



# Mood survey within the river cruise industry

Spring 2021





# Many thanks to...

...the representatives of our longtime partners of **ARGE Donau Österreich**,  
**Mag. Bernhard Schröder** and **Petra Riffert**,

...**Prof. Gerhard Skoff** (stage4solutions)

and

...the team of **River Cruise Europe** with **Monic van der Heyden** and  
**Kathelijne Soydan**

who supported us actively in developing the questionnaire and/or sending  
out the survey links!

...and of course to all who participated in the survey!





## QUESTIONS TO BE ANSWERED

- ⦿ How is the crisis changing the market?
- ⦿ What is the mood in the industry?
- ⦿ What are the expectations for the near future?
- ⦿ Will we be able to return to the success we had before Covid?
- ⦿ What fundamental changes will all those involved have to adjust to?



## SURVEY METHODOLOGY

- ⦿ Online survey
- ⦿ Target group: companies/institutions with direct or indirect relation to the river cruise industry
- ⦿ Focus: Rhine-Main-Danube

## SAMPLE

The realized sample includes 122 complete cases with stakeholders who belong to the target group.

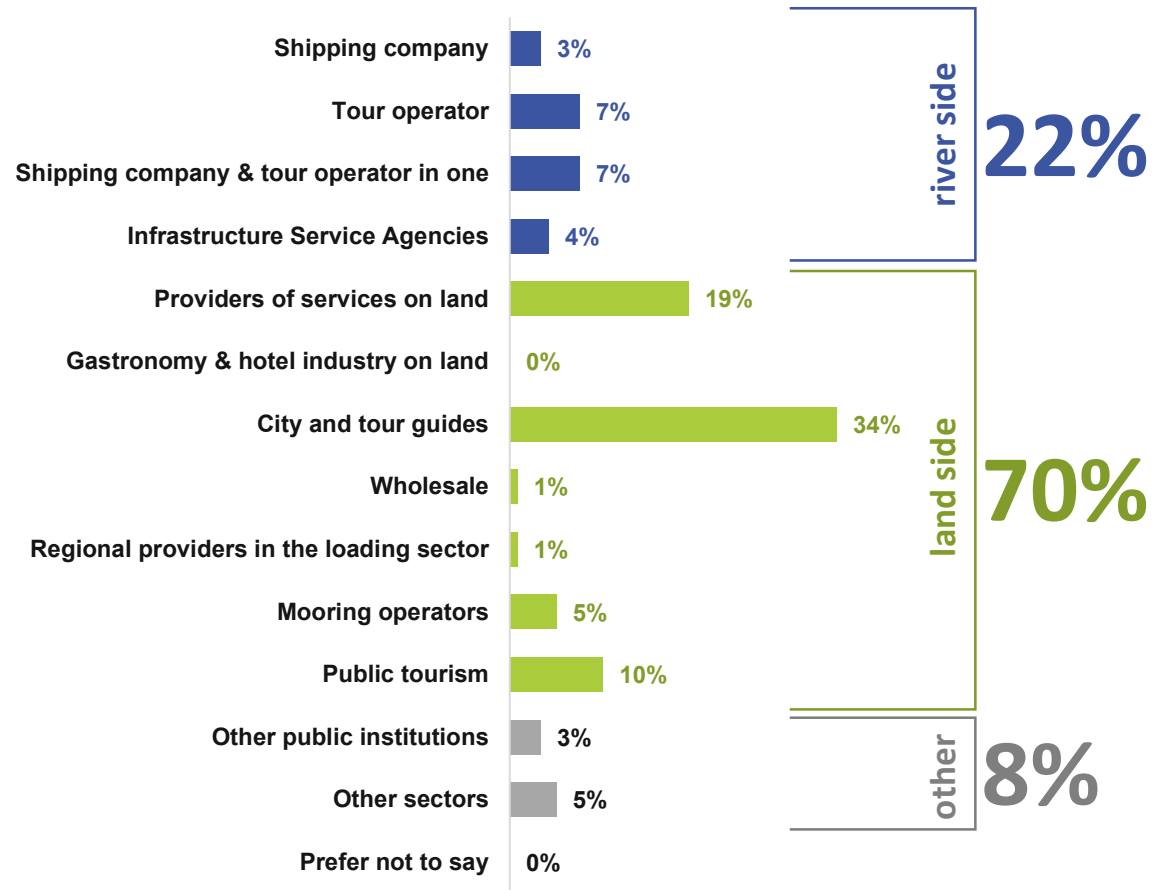
## SURVEY PERIOD

March 8 - March 23, 2021



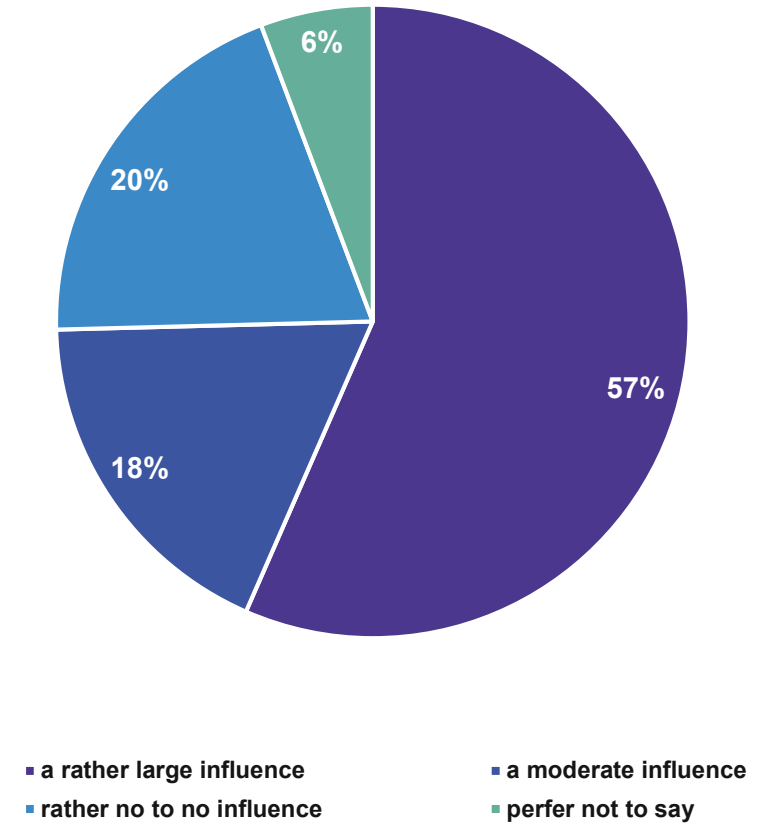
# Sample (1)

F1 Which sector do you belong to? If more than one sector applies, please choose the main sector.



N=122, only one answer was possible

F2 What influence do you have within your company in regard to strategic decisions?

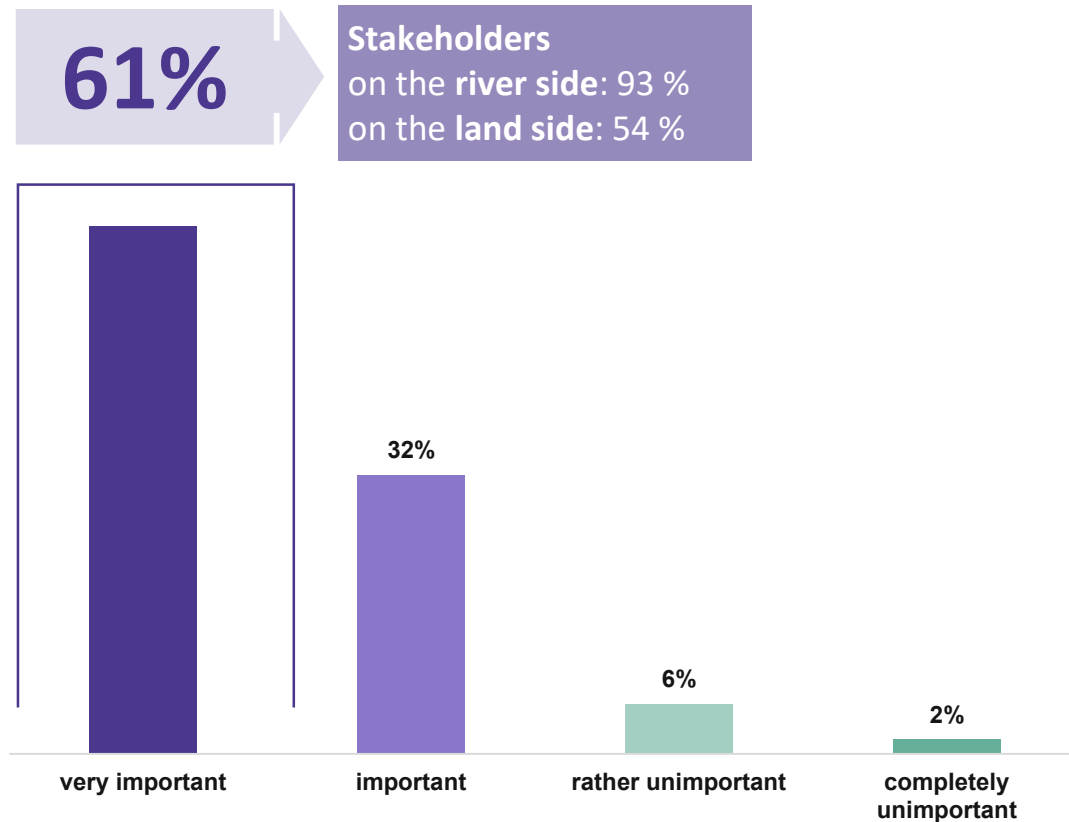


N=122



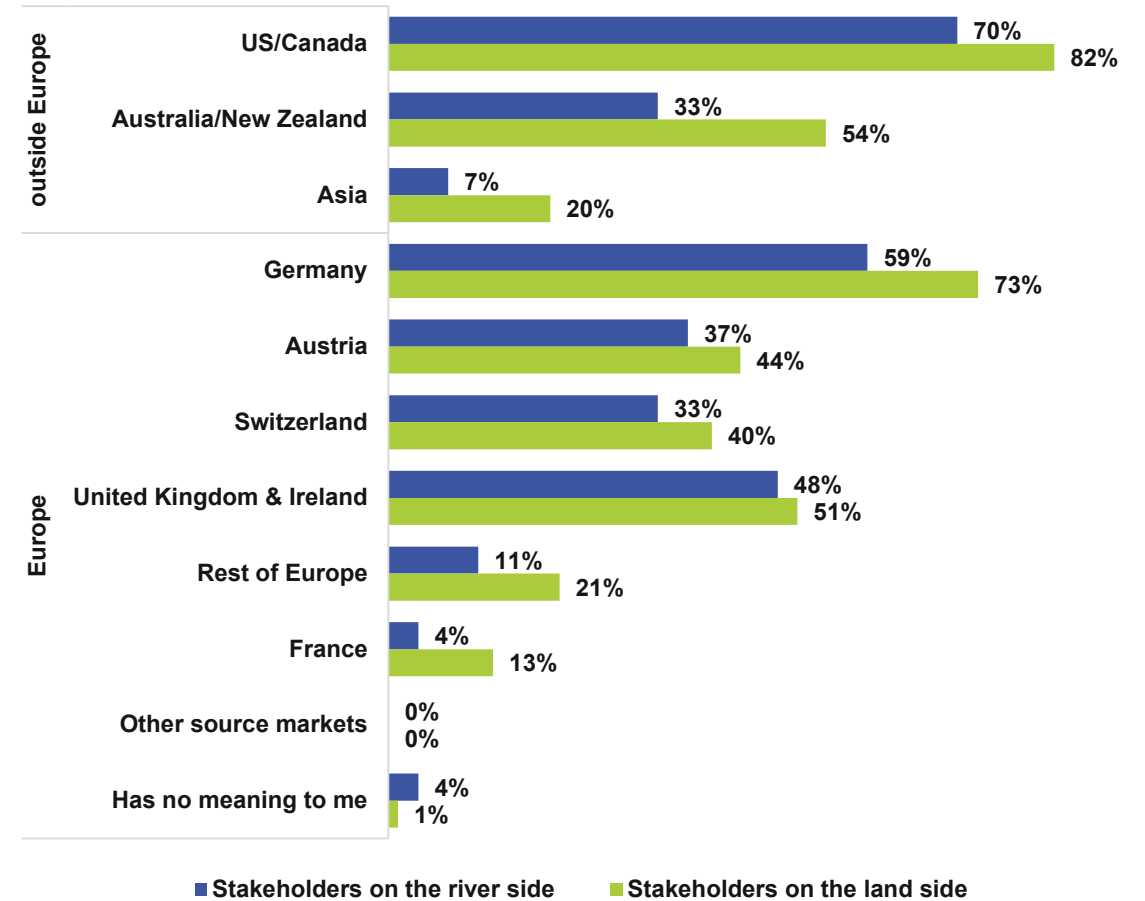
# Sample (2)

F3 What is the current importance of river cruising in your company or institution (regardless of Covid)?



N=122

F4 Which source markets significantly influence your business success? Where is your focus?

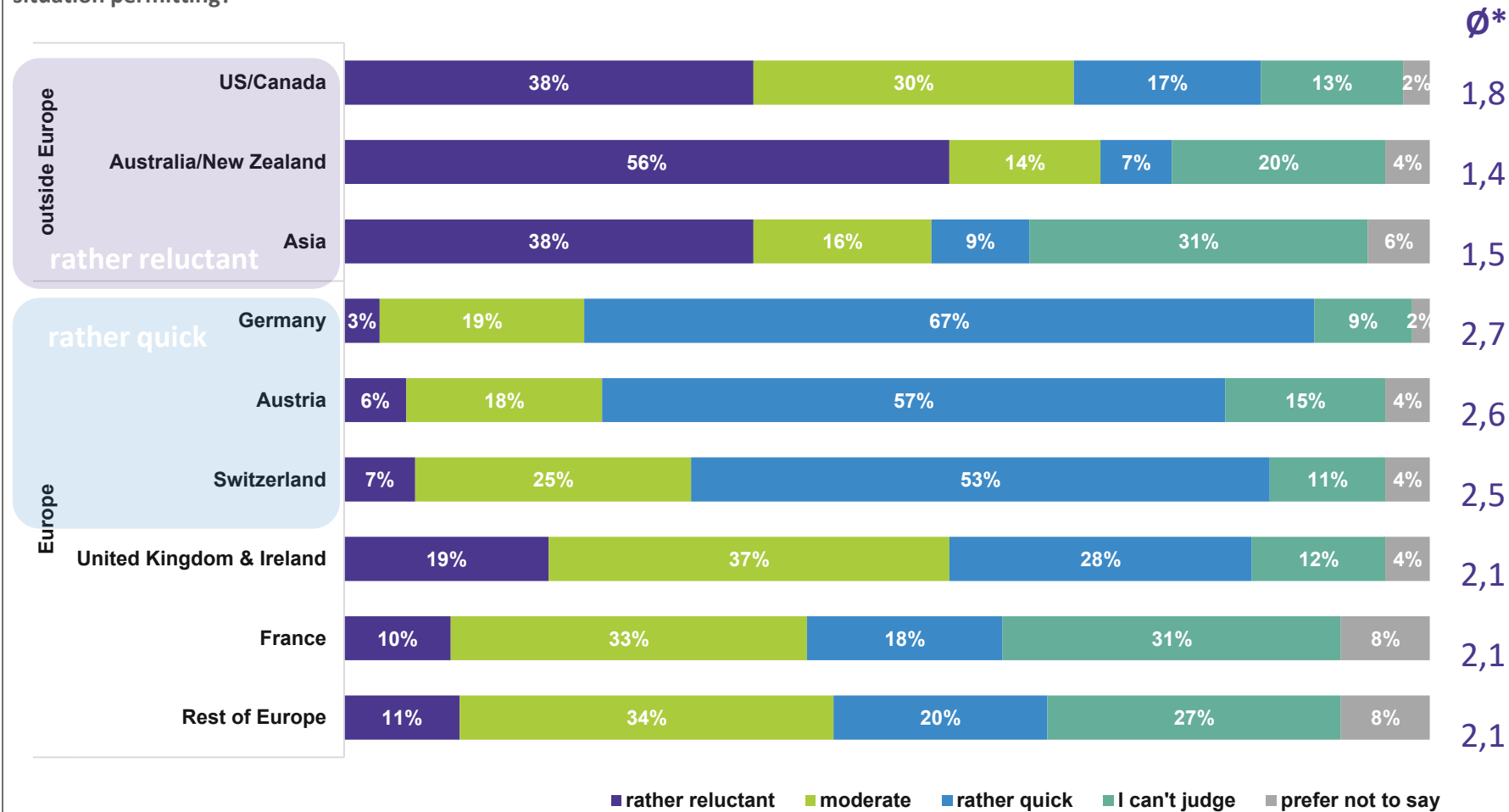


River side: N=27, land side: N=85; multiple answers were possible



# Development of the Danube river cruising

F5 How do you assess the development of the Danube river cruising? How quickly will passengers from the following source markets return to the Danube (also Rhine-Main-Danube Canal), situation permitting?



**First markets to come back**

Germany, Austria & Switzerland (D-A-CH)

**Markets that will react rather cautiously**

Australia/New Zealand, US/Canada, Asia

**Difficult to estimate**

Asia, France, Rest of Europe

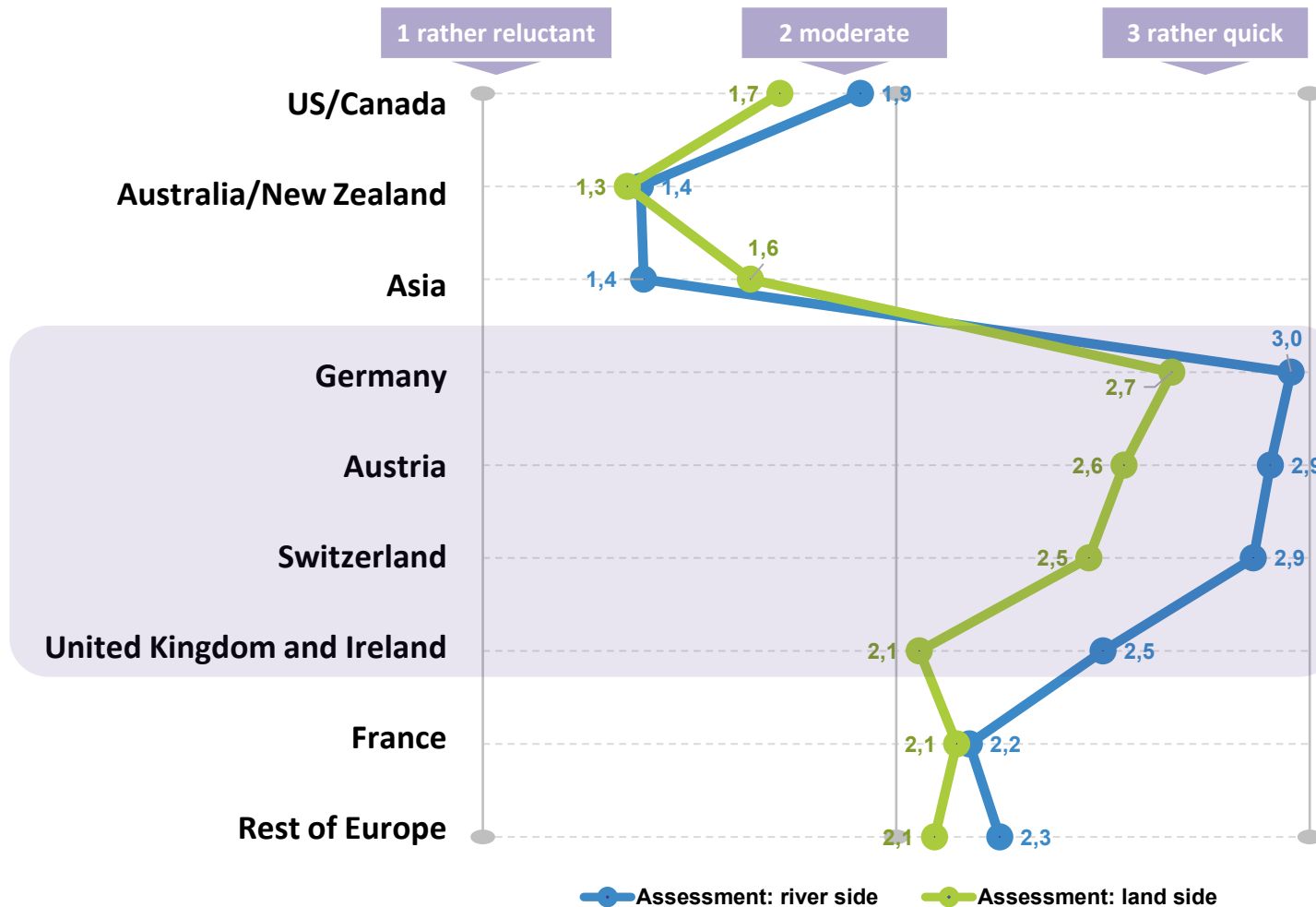
N=122

\*On a 3-point scale of 1=rather reluctant, 2=moderate to 3=rather quick



# Development of the Danube river cruising

F5 How do you assess the development of the Danube river cruising? How quickly will passengers from the following source markets return to the Danube (also Rhine-Main-Danube Canal), situation permitting?



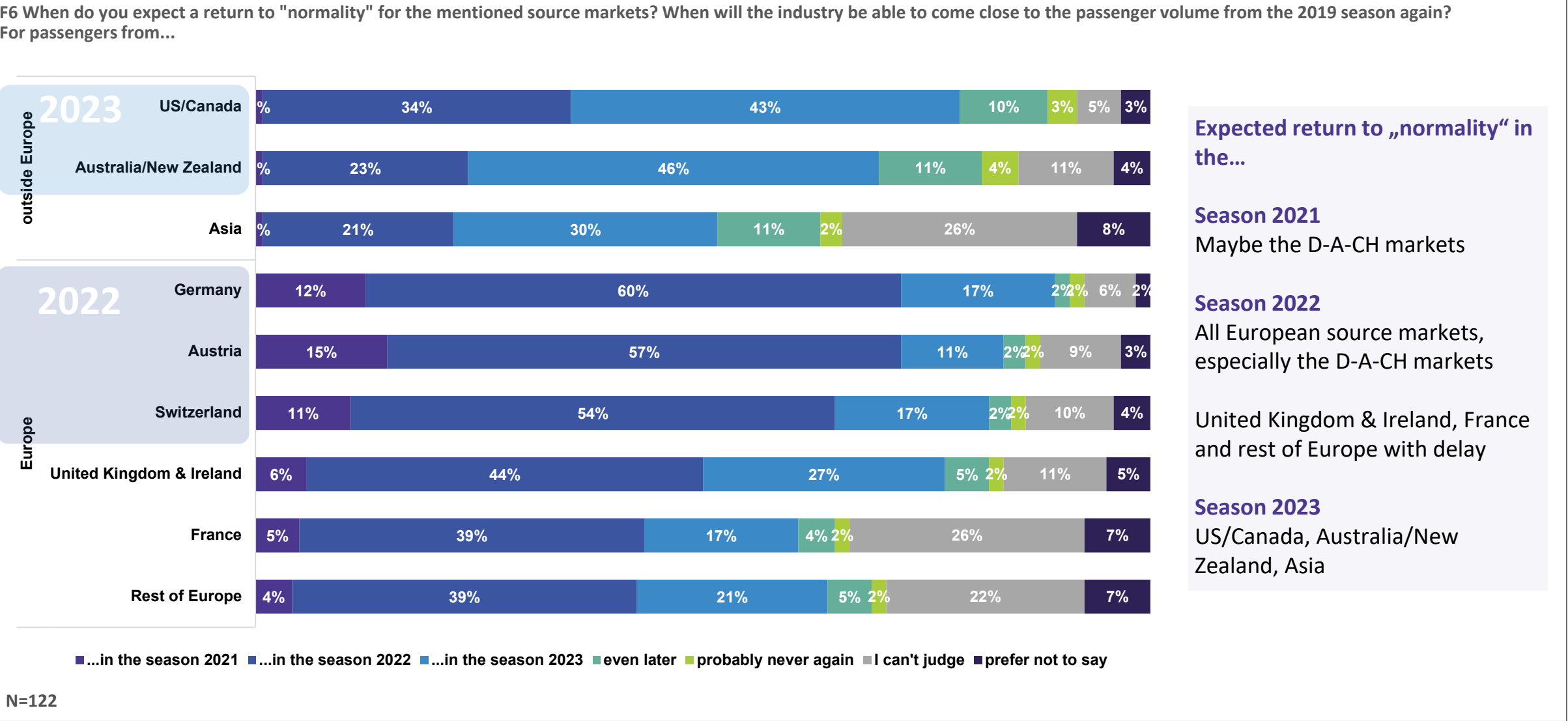
## Different assessments

- D-A-CH markets and UK & Ireland are assessed somewhat more cautiously by the land side.
- Asia is assessed more optimistically from the land side than from the river side.

Mean values on a 3-point scale of 1=rather reluctant, 2=moderate to 3=rather quick



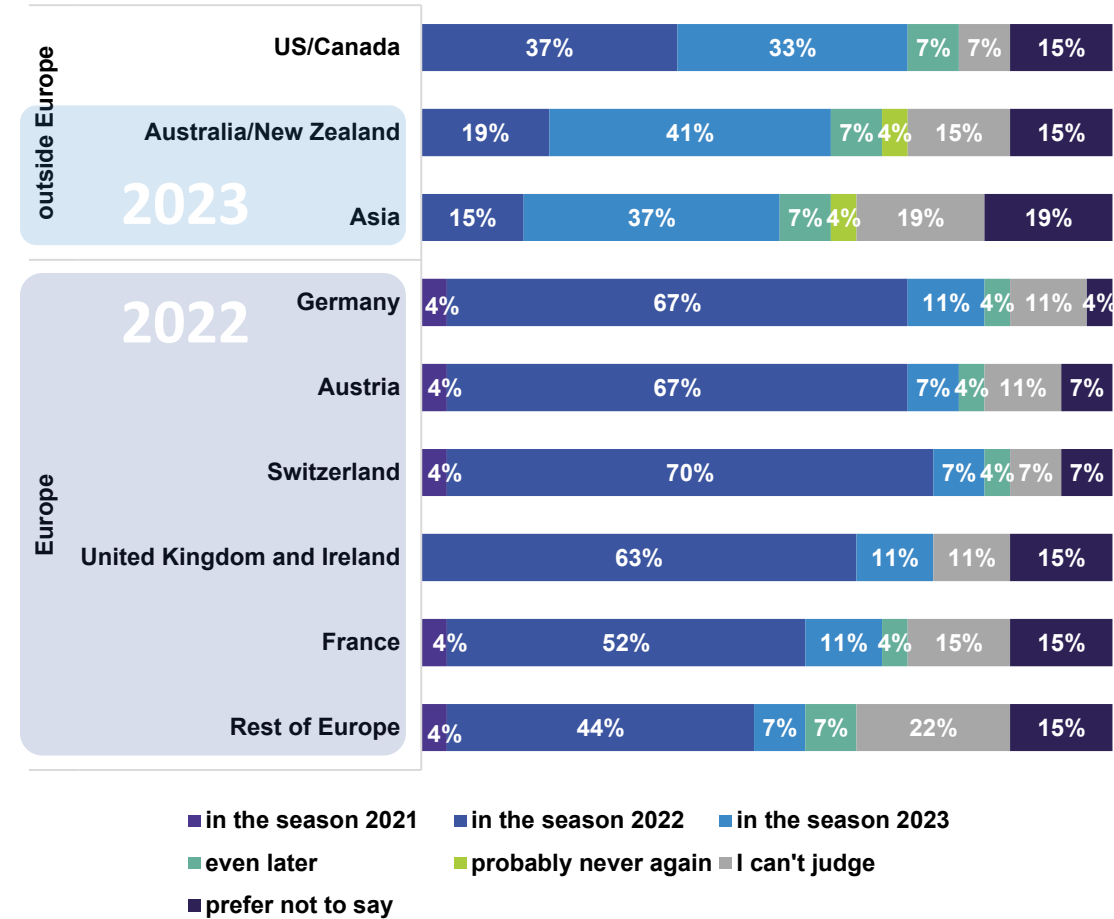
# Expected return to "normality"





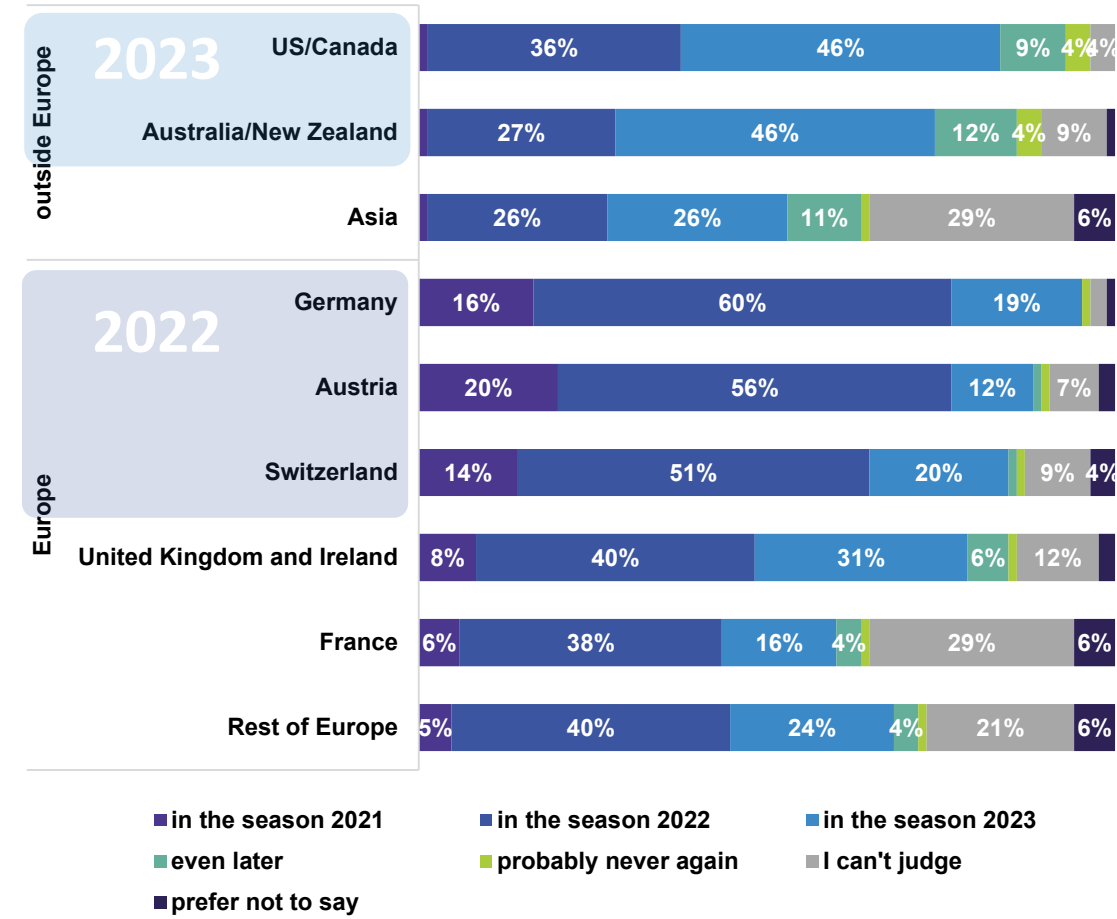
# Expected return to "normality"

## Assessment: river side



N=27

## Assessment: land side

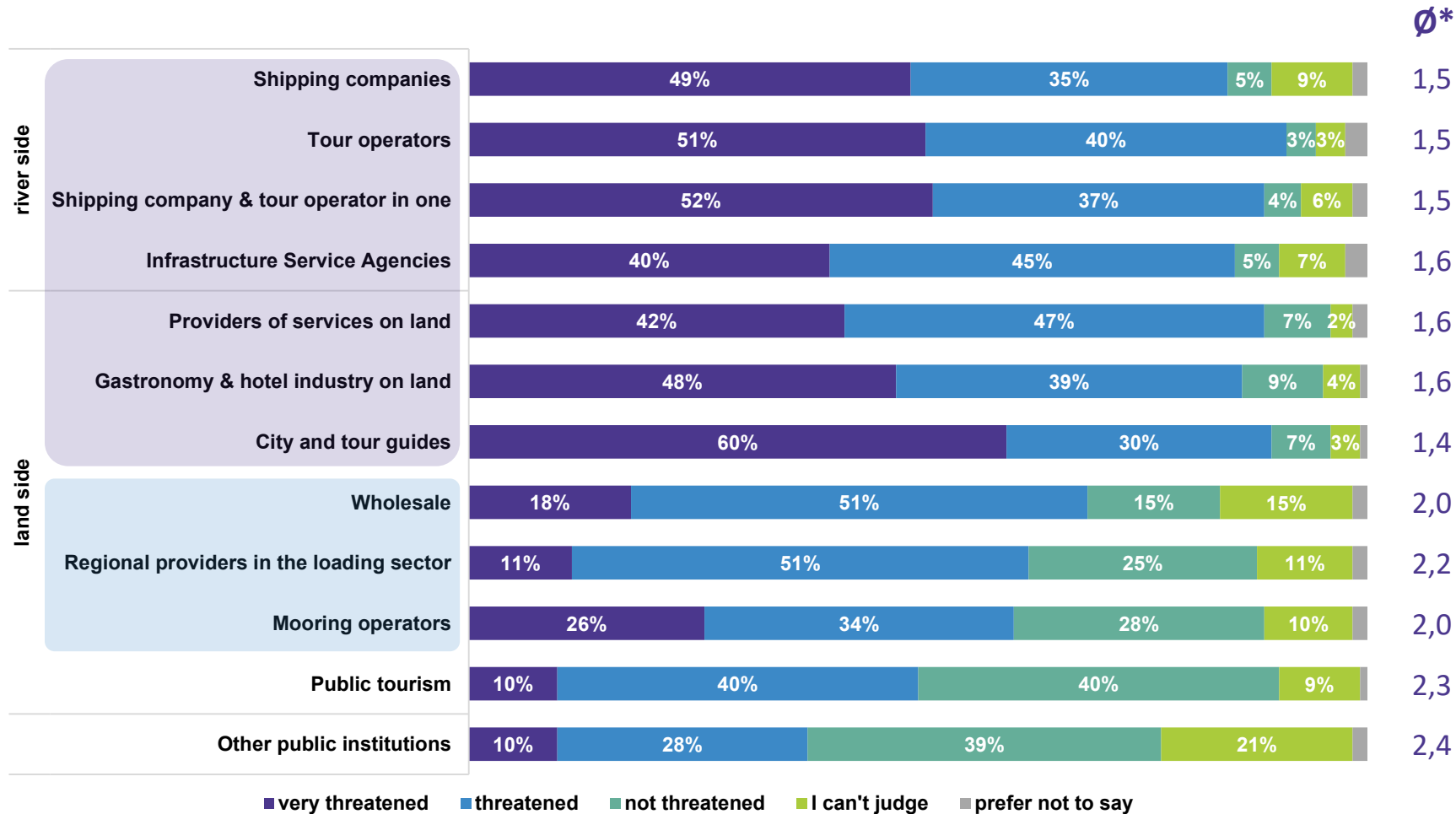


N=85



# Threatened sectors or stakeholders

F7 In your opinion, which sectors or stakeholders of the river cruise industry are currently particularly threatened in their existence?



## Very threatened sectors

- city and tour guides
- all river side sectors
- gastronomy and hotel industry on land
- providers of services on land

## Threatened sectors

- wholesale
- regional providers in the loading sector
- mooring operators

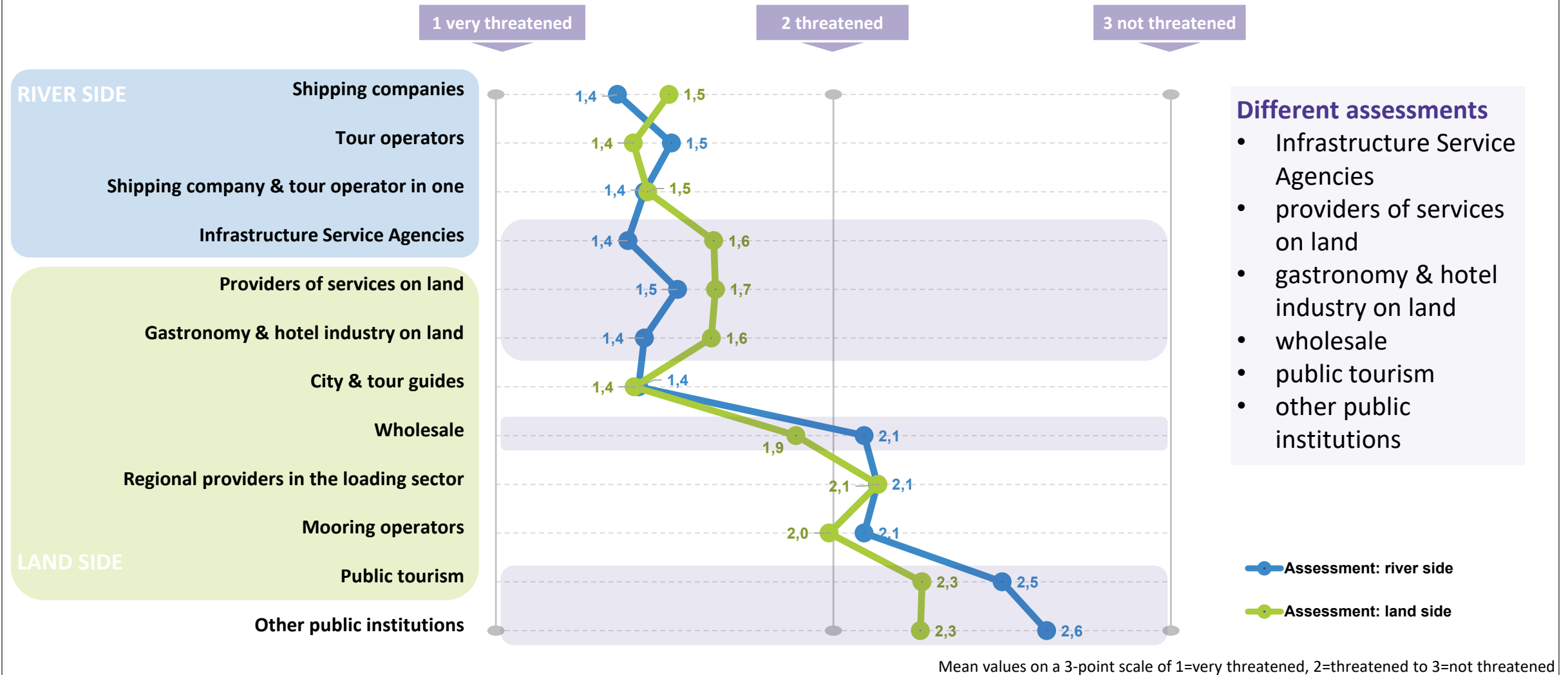
N=122

\*On a 3-point scale of 1=very threatened, 2=threatened to 3=not threatened



# Threatened sectors or stakeholders

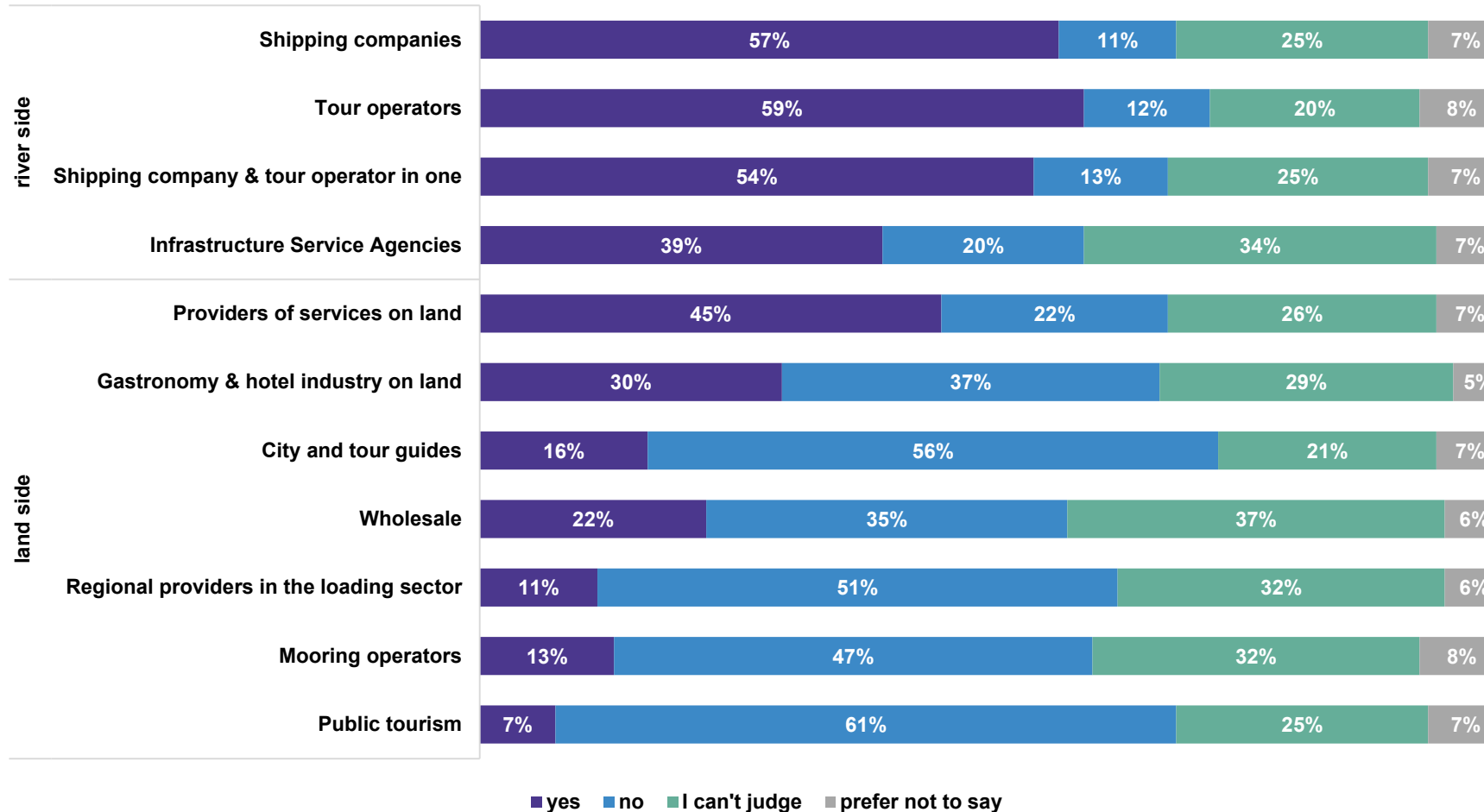
F7 In your opinion, which sectors or stakeholders of the river cruise industry are currently particularly threatened in their existence?





# Expected market takeovers or mergers

F8 Do you expect market takeovers or mergers of companies or institutions in the short to medium term? In which sectors?



## Expected takeovers or mergers

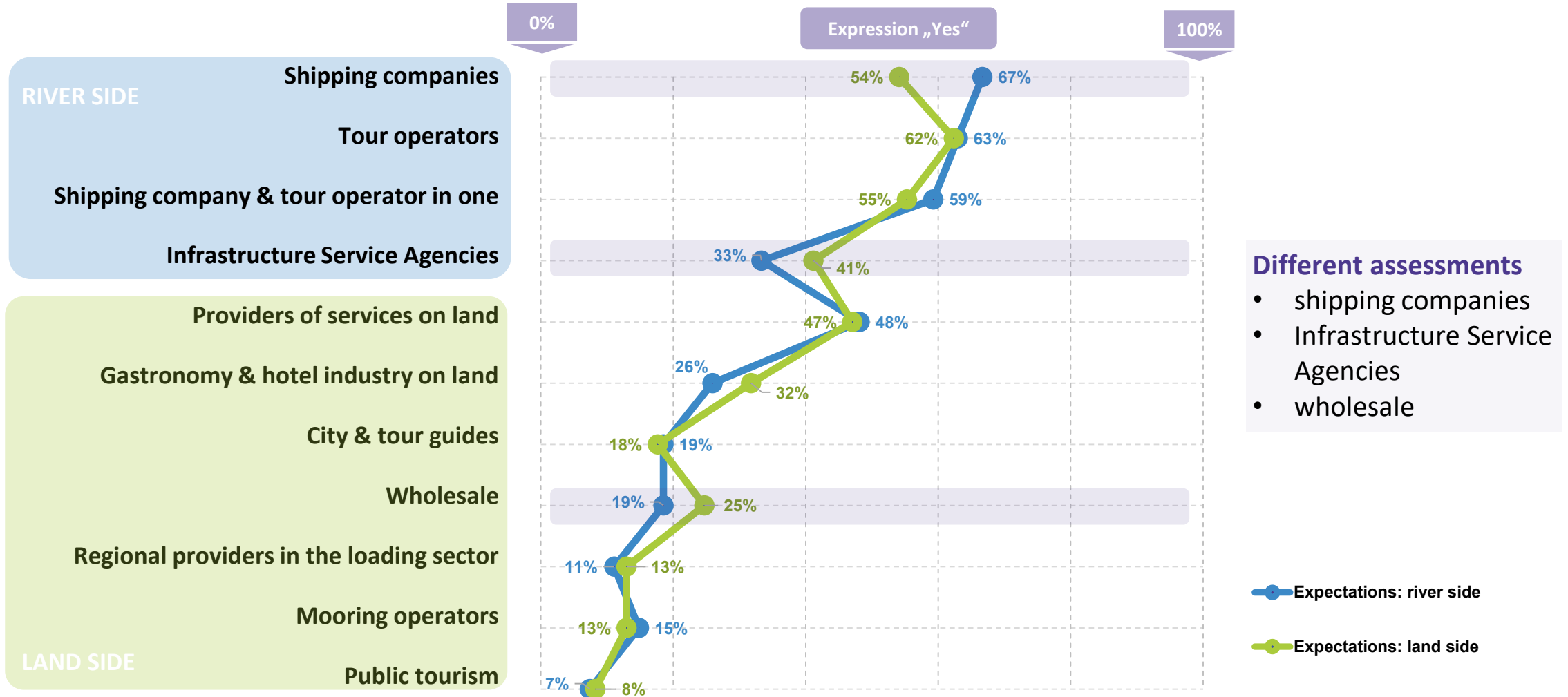
- shipping companies and tour operators (or both)
- Infrastructure Service Agencies
- providers of services on land

N=122



# Expected market takeovers or mergers

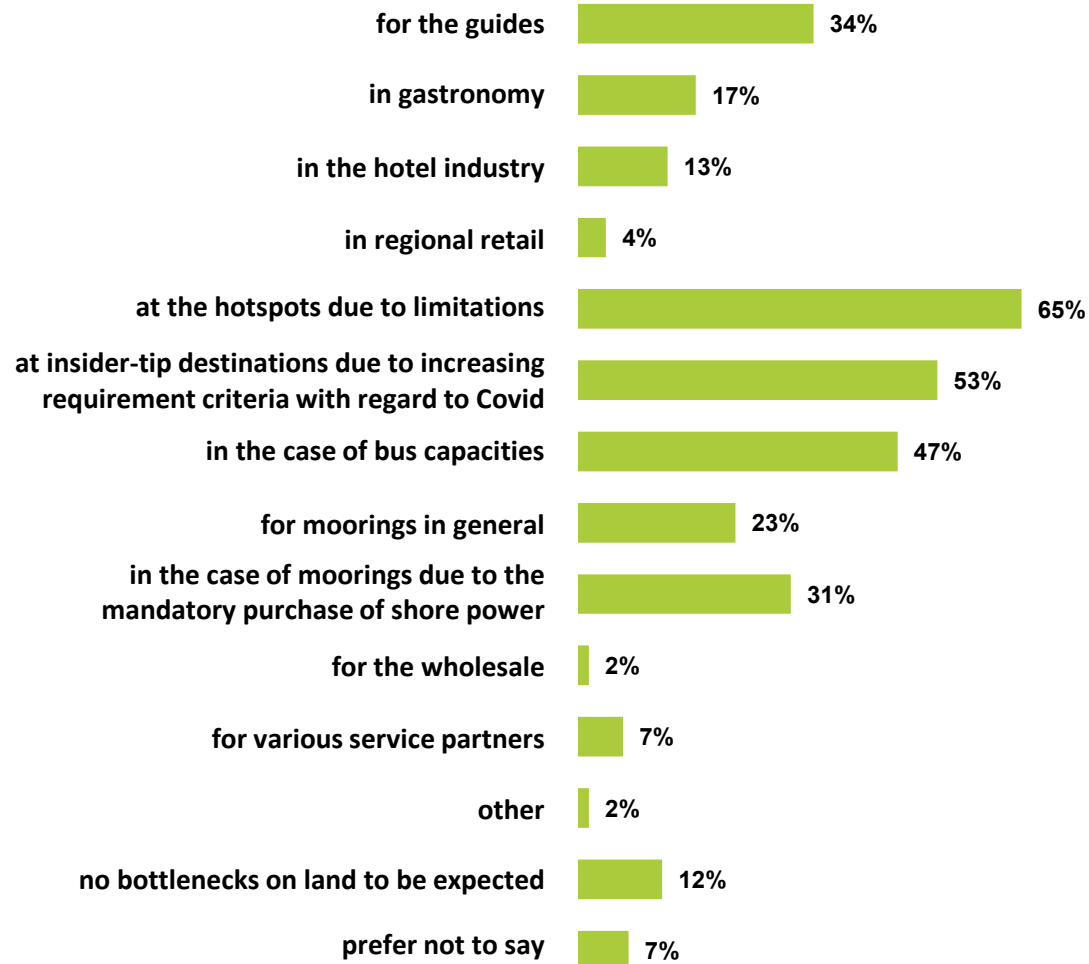
F8 Do you expect market takeovers or mergers of companies or institutions in the short to medium term? In which sectors?





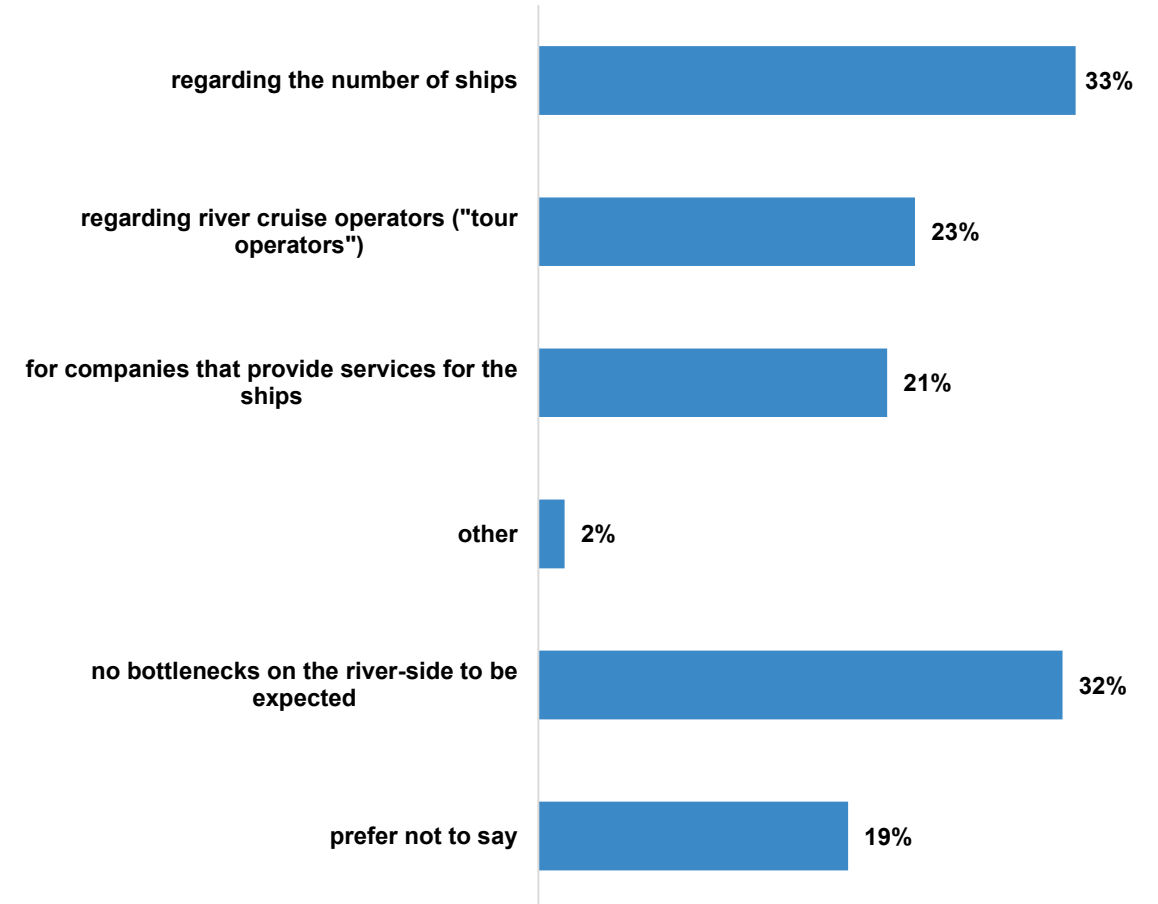
# Expected bottlenecks

F9a Where do you think there could be bottlenecks in the river cruise industry in the future?  
On the land side



N=122, multiple answers were possible

F9b Where do you think there could be bottlenecks in the river cruise industry in the future?  
On the river side

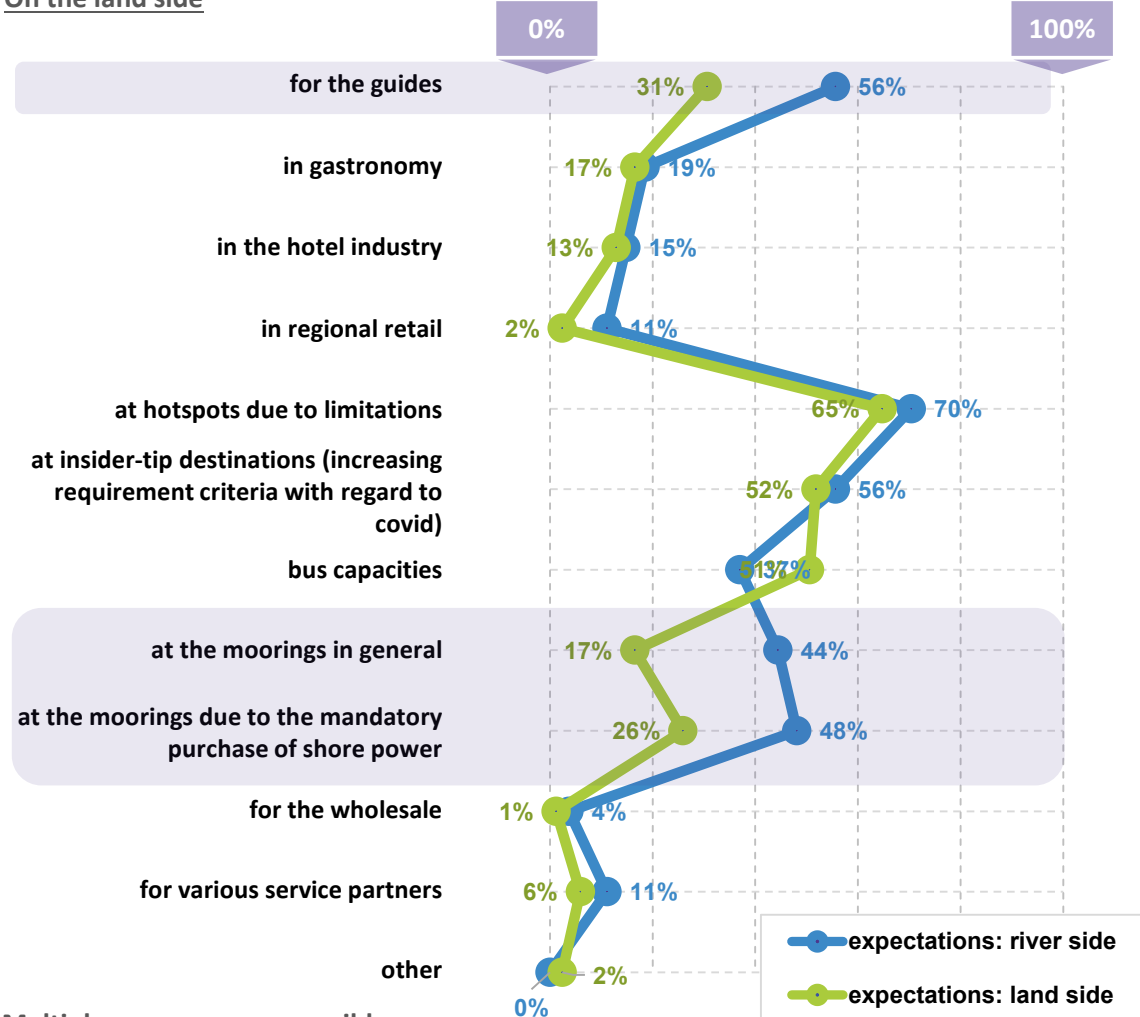


N=122, multiple answers were possible



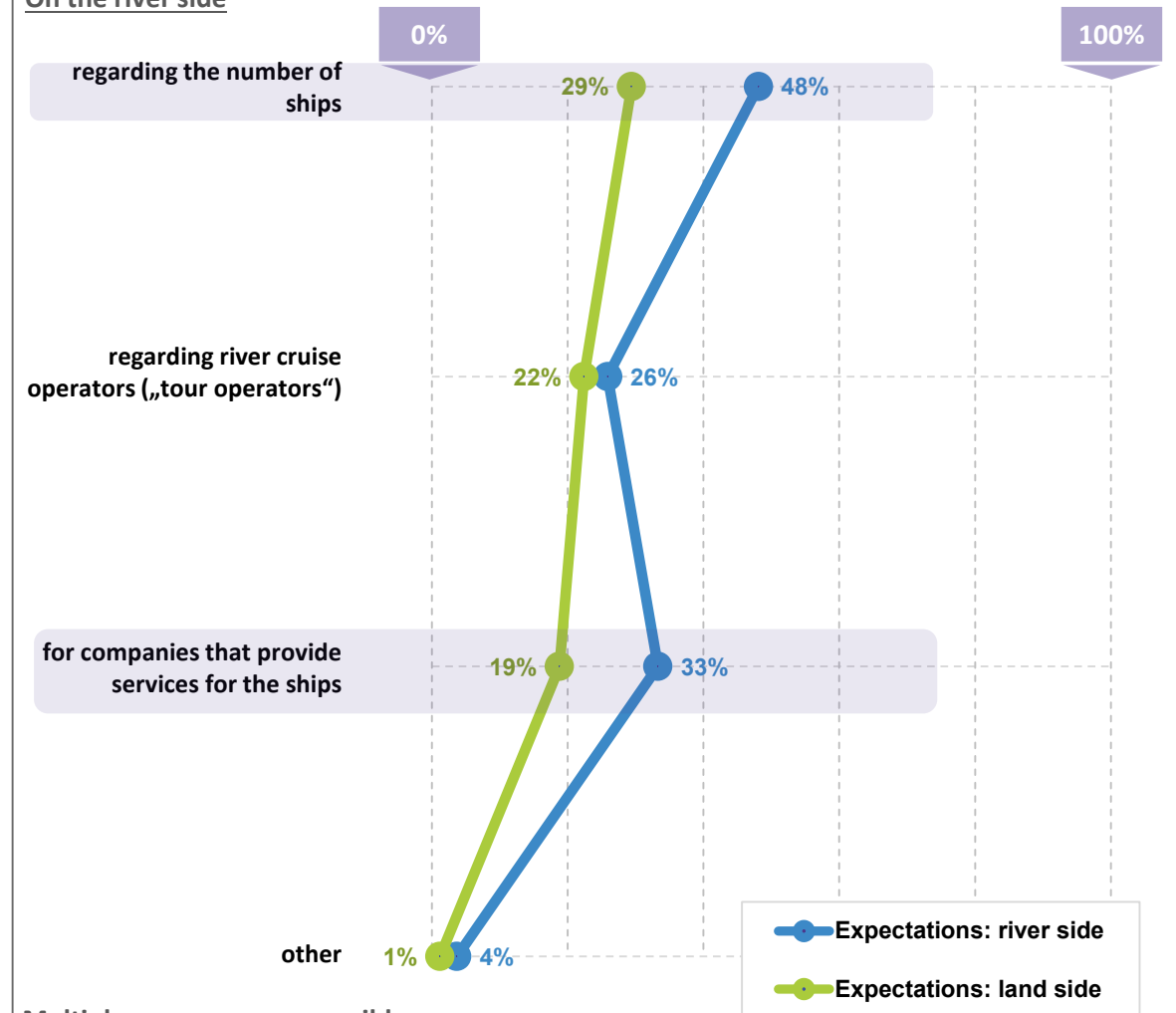
# Expected bottlenecks

F9a Where do you think there could be bottlenecks in the river cruise industry in the future?  
On the land side



Multiple answers were possible.

F9b Where do you think there could be bottlenecks in the river cruise industry in the future?  
On the river side

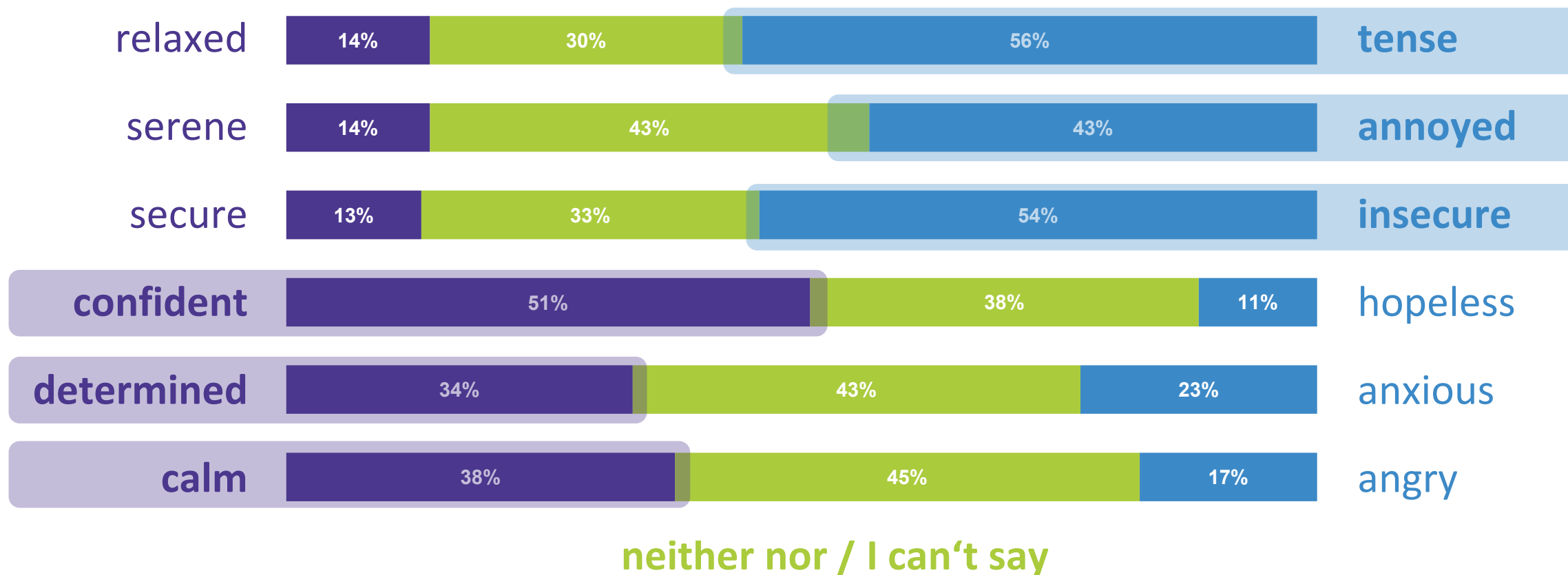


Multiple answers were possible.



# Current mood in the company

F10 Please describe the current mood in your company with regard to the river cruise

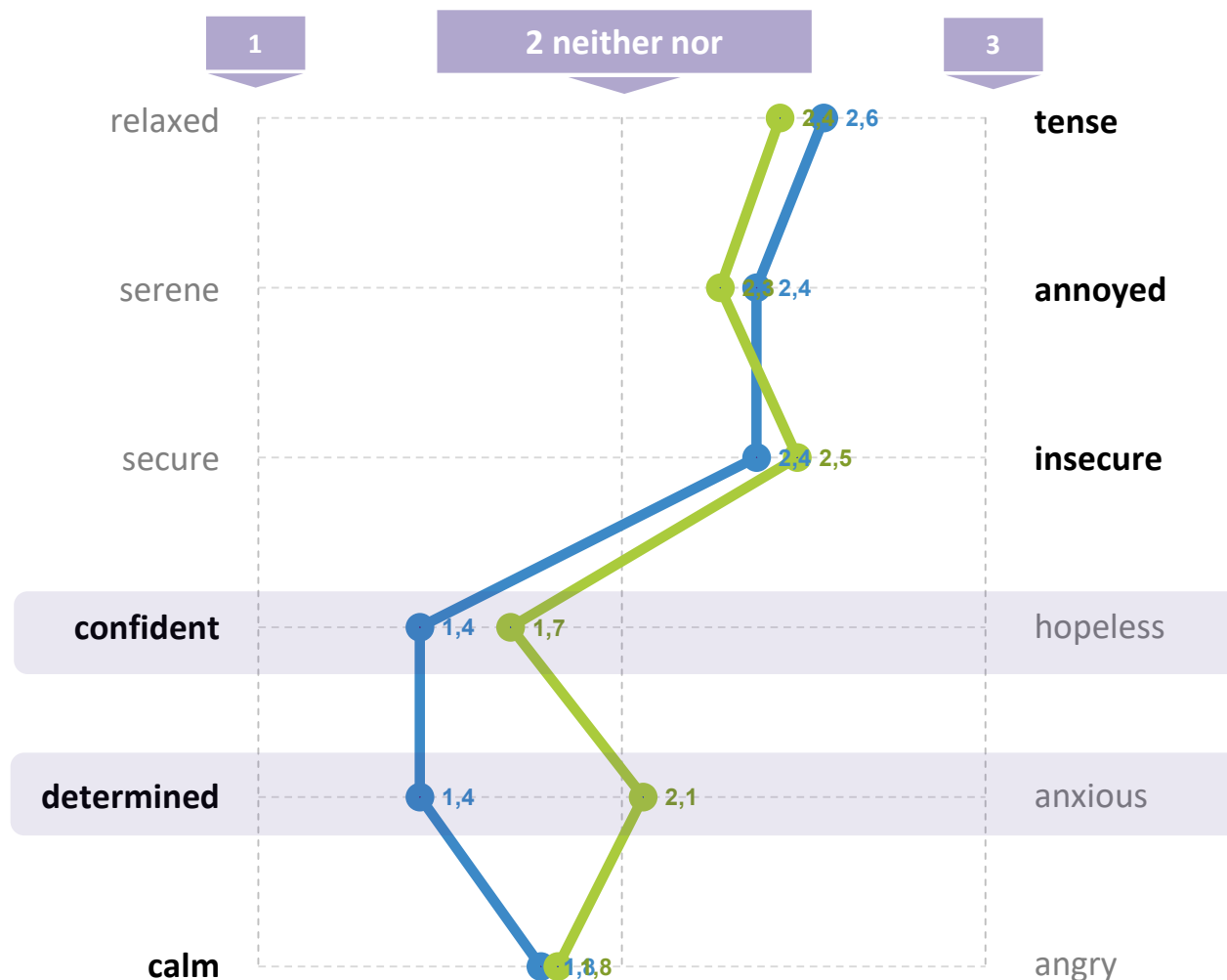


N=122



# Current mood in the company

F10 Please describe the current mood in your company with regard to the river cruise



Similar mood between land and river side.

**Except** for the pairs of opposites “**determined – anxious**” and “**confident – hopeless**”

Although the mood is rather tense, annoyed and insecure, **stakeholders are confident, determined and calm about the future.**

— Stakeholders on the river side

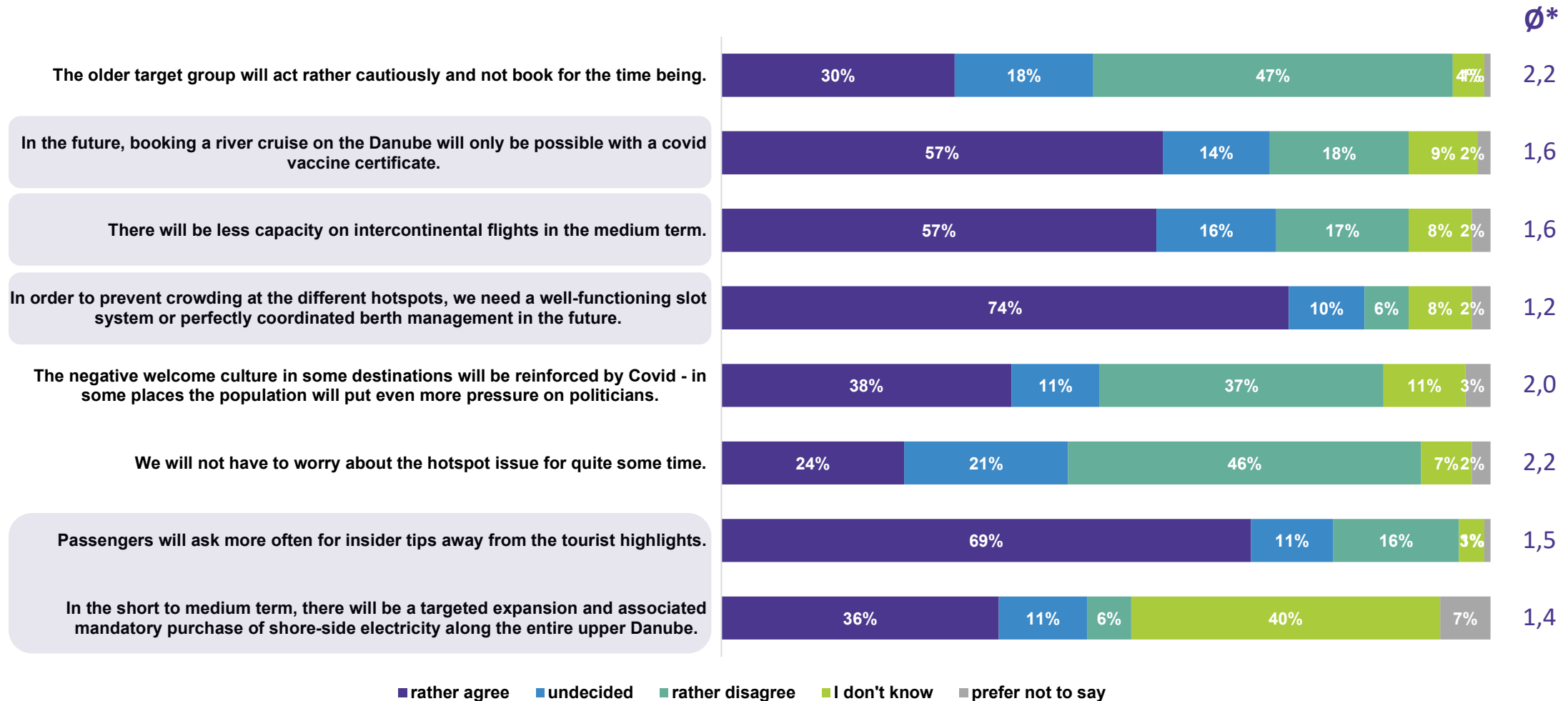
— Stakeholders on the land side

Mean values on a scale between 1=expression on the left side, 2=neither nor, 3=expression on the right side



# Evaluation of individual statements

F11 Please read the following statements and express your opinion on a scale from "1=rather agree", "2=undecided" to "3=rather disagree"



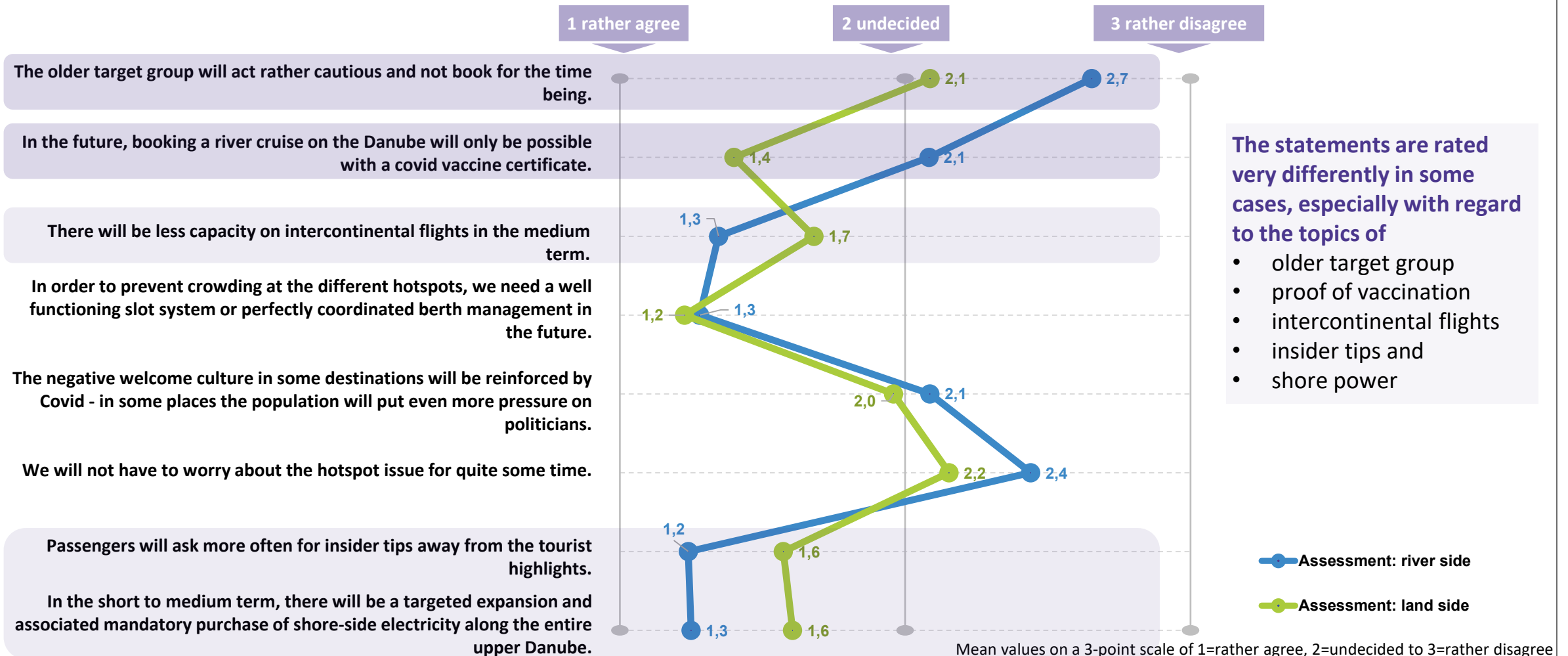
N=122

\*On a 3-point scale of 1=rather agree, 2=undecided to 3=rather disagree



# Evaluation of individual statements

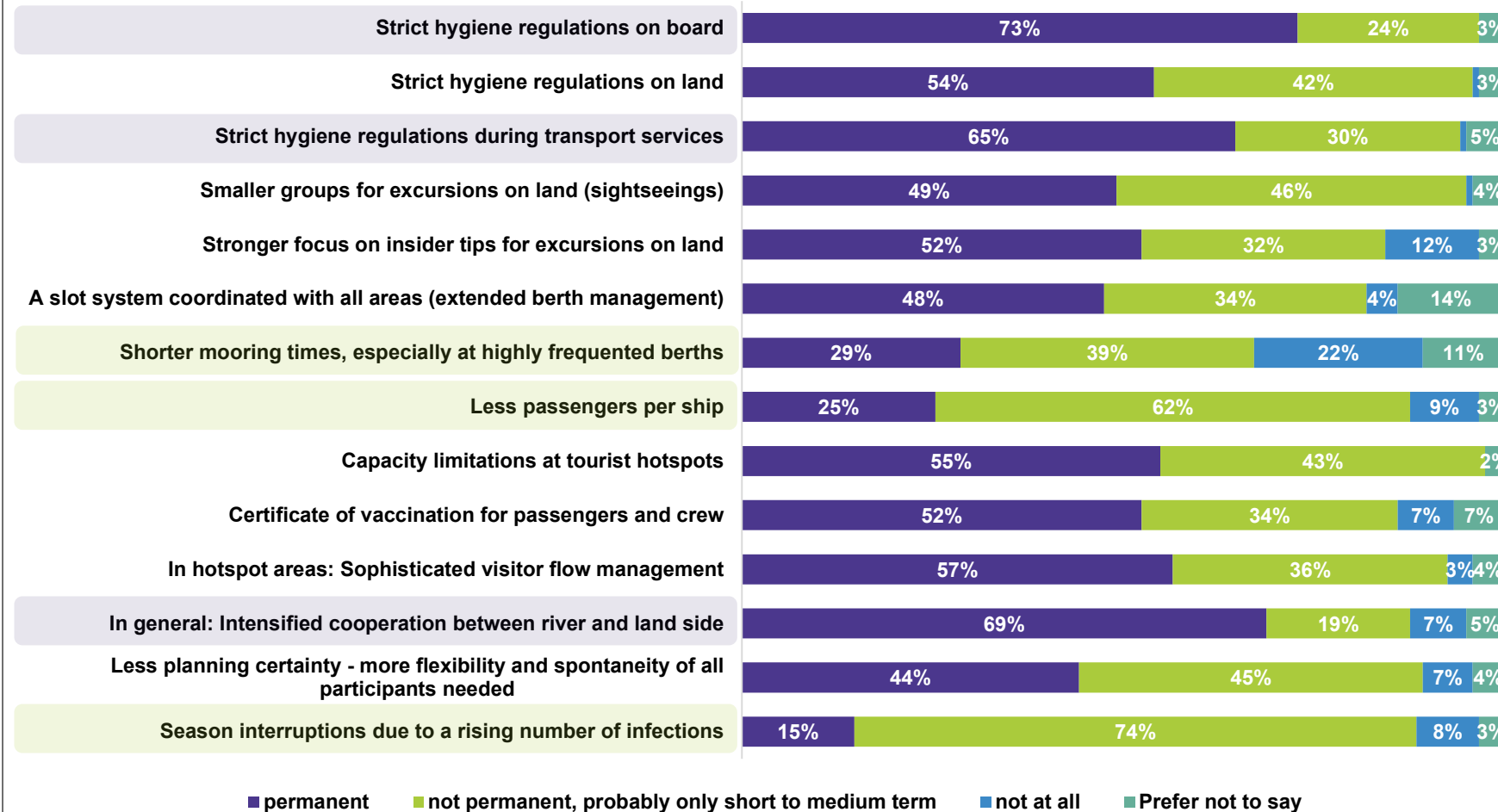
F11 Please read the following statements and express your opinion on a scale from "1=rather agree", "2=undecided" to "3=rather disagree"





# Fundamental changes

F12 What fundamental changes do you think the river cruise industry will have to adapt to PERMANENTLY?



N=122

## Long-term changes

- Strict hygiene regulations on board
- Strict hygiene regulations during transport services
- In general: Intensified cooperation between river and land side

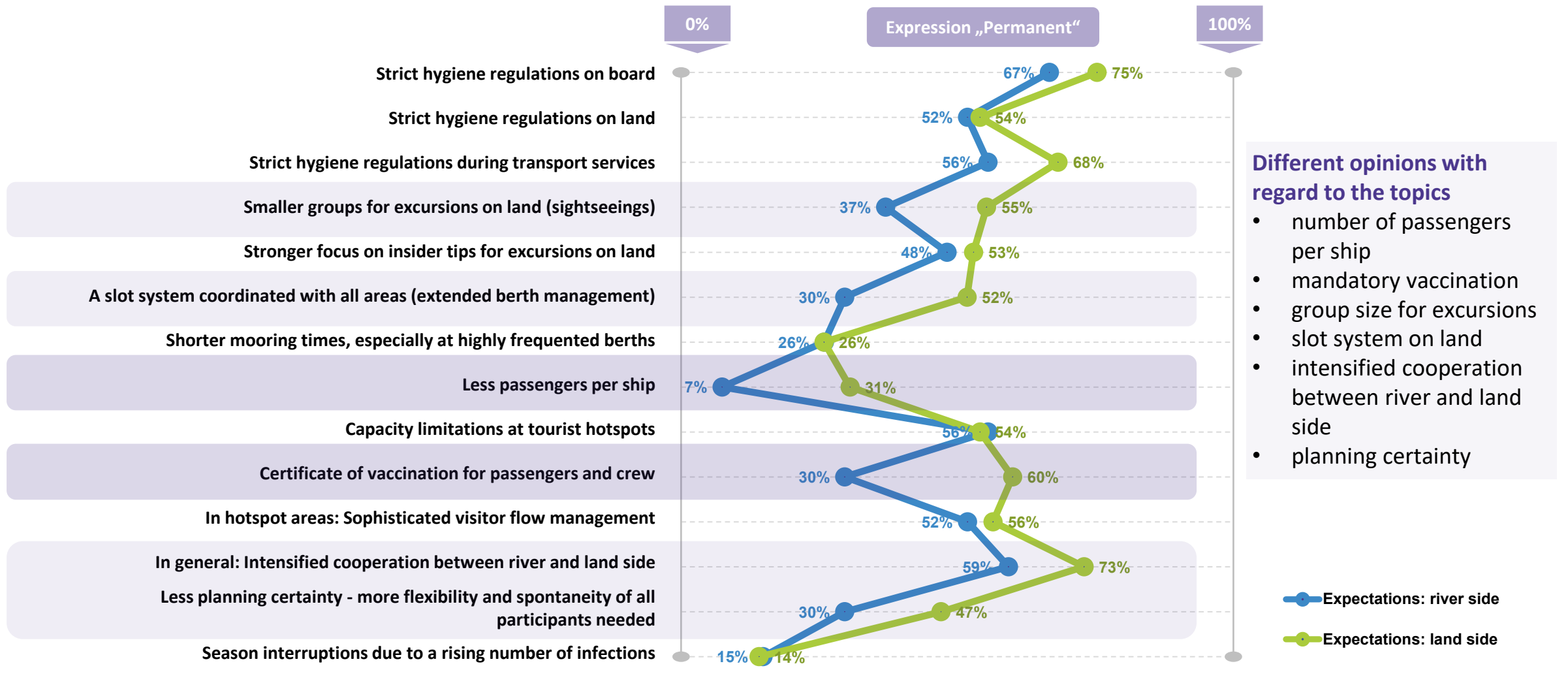
## Short-term changes

- Shorter mooring times
- Less passengers per ship
- Season interruptions due to a rising number of infections



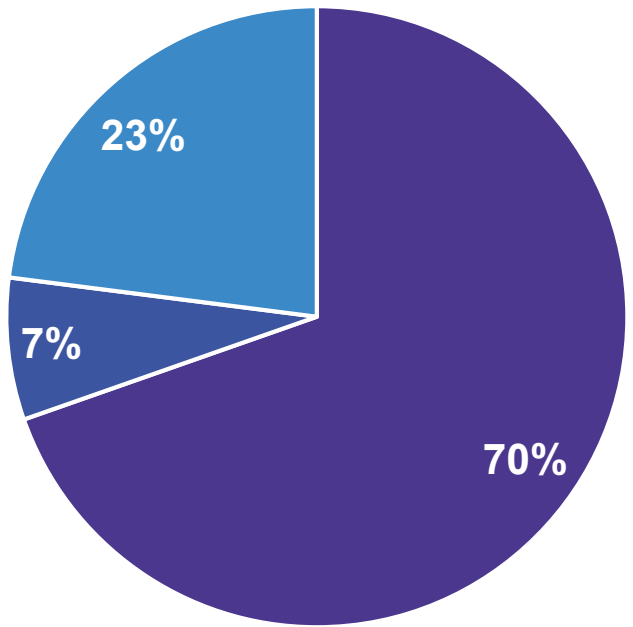
# Fundamental changes

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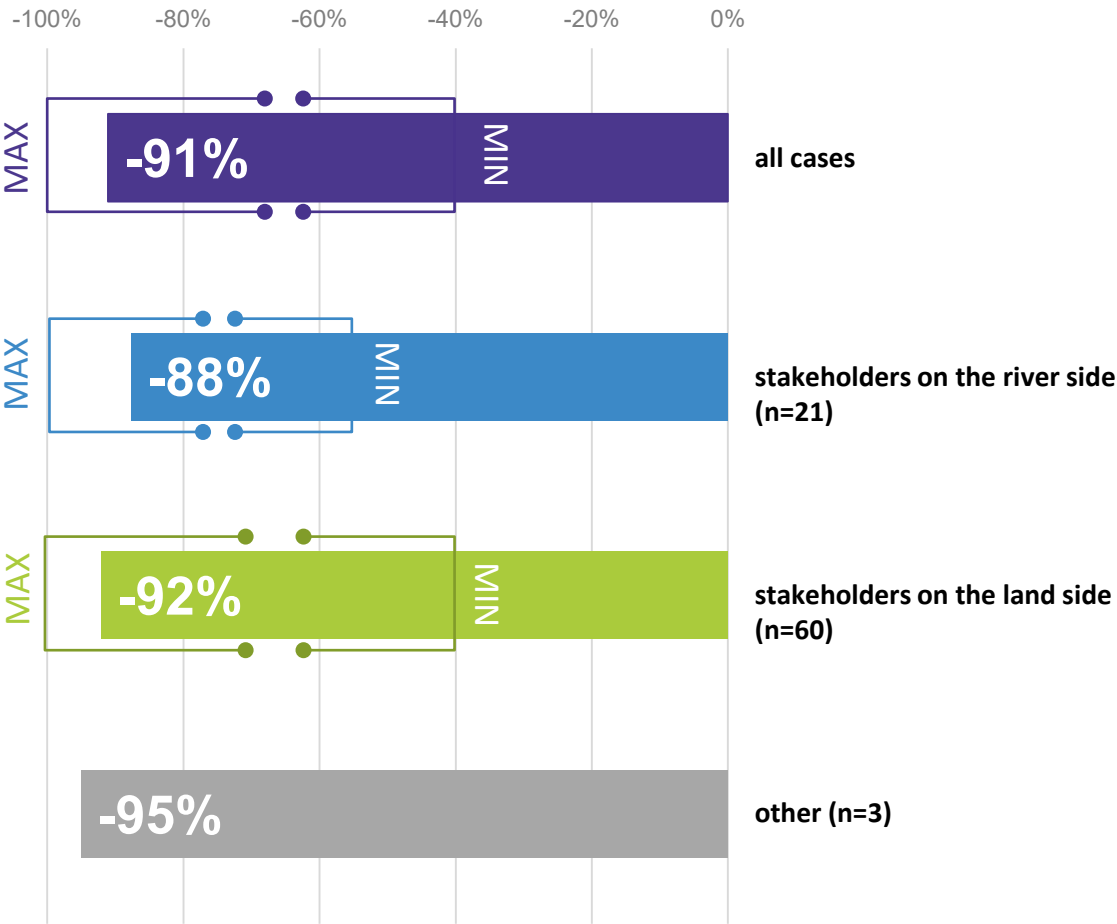
F13 What was your business success in 2020 in the river cruise sector compared to 2019?  
Give an estimate of the percentage change and the relevant sign (loss: - / profit: +).



■ with percentage ■ business success is not measured by sales ■ prefer not to say

N=122

## Deviation from prior-year sales in percent

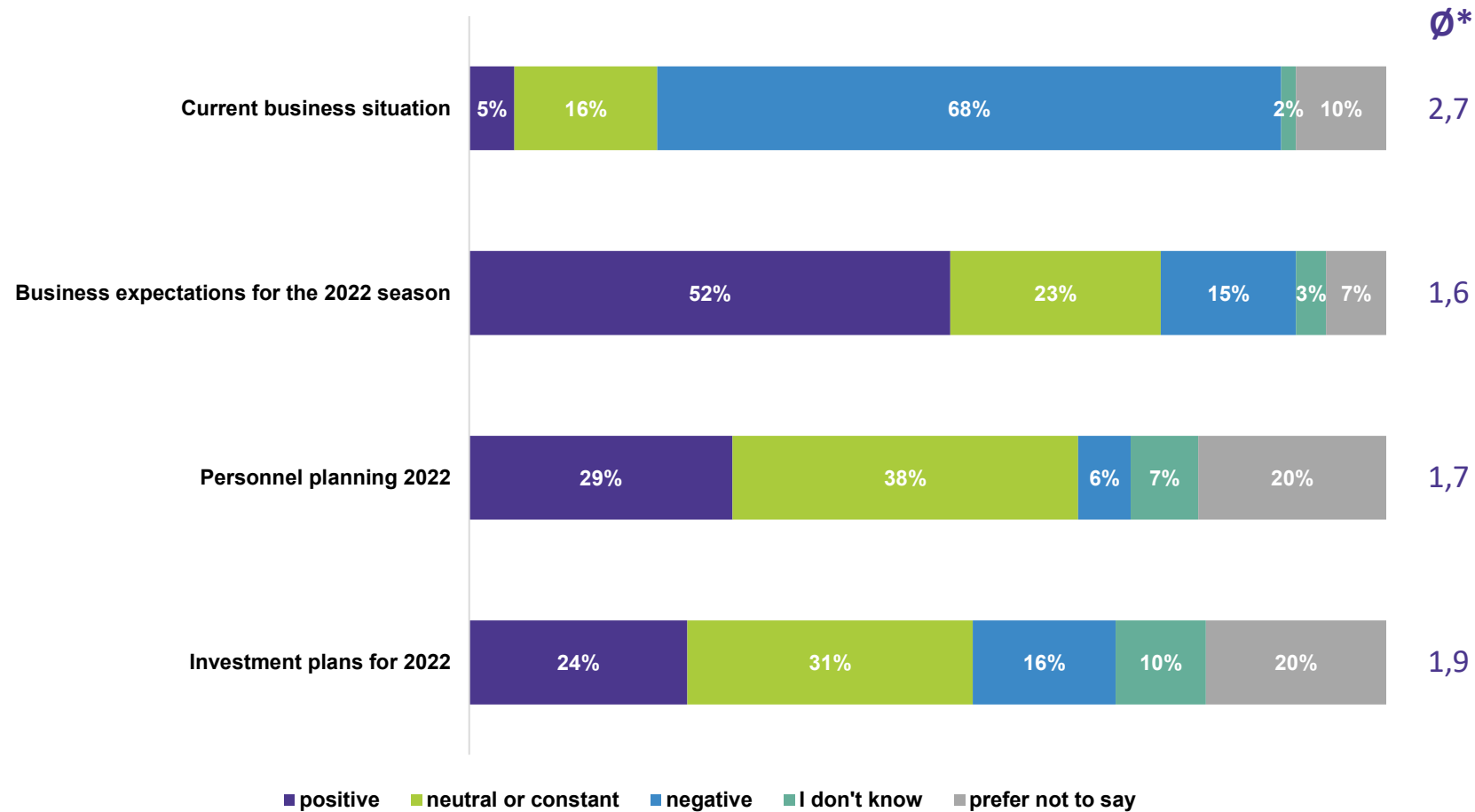


N=84



# Business situation and expectations

F14 Please rate the following aspects in general in relation to your company on a scale from "1=positive", "2=neutral or constant" to "3=negative"



„positive“  
business expectations for the  
2022 season

„neutral or constant“  
• personnel planning 2022  
• investment plans for 2022

„negative“  
current business situation

N=122

\*On a 3-point scale of 1=positive, 2=neutral or constant to 3=negative



# Business situation and expectations

F14 Please rate the following aspects in general in relation to your company on a scale from "1=positive", "2=neutral or constant" to "3=negative"



Although the **current business situation** is **negative**, **expectations** for the 2022 season are **quite positive** - both on the river and on the land side.

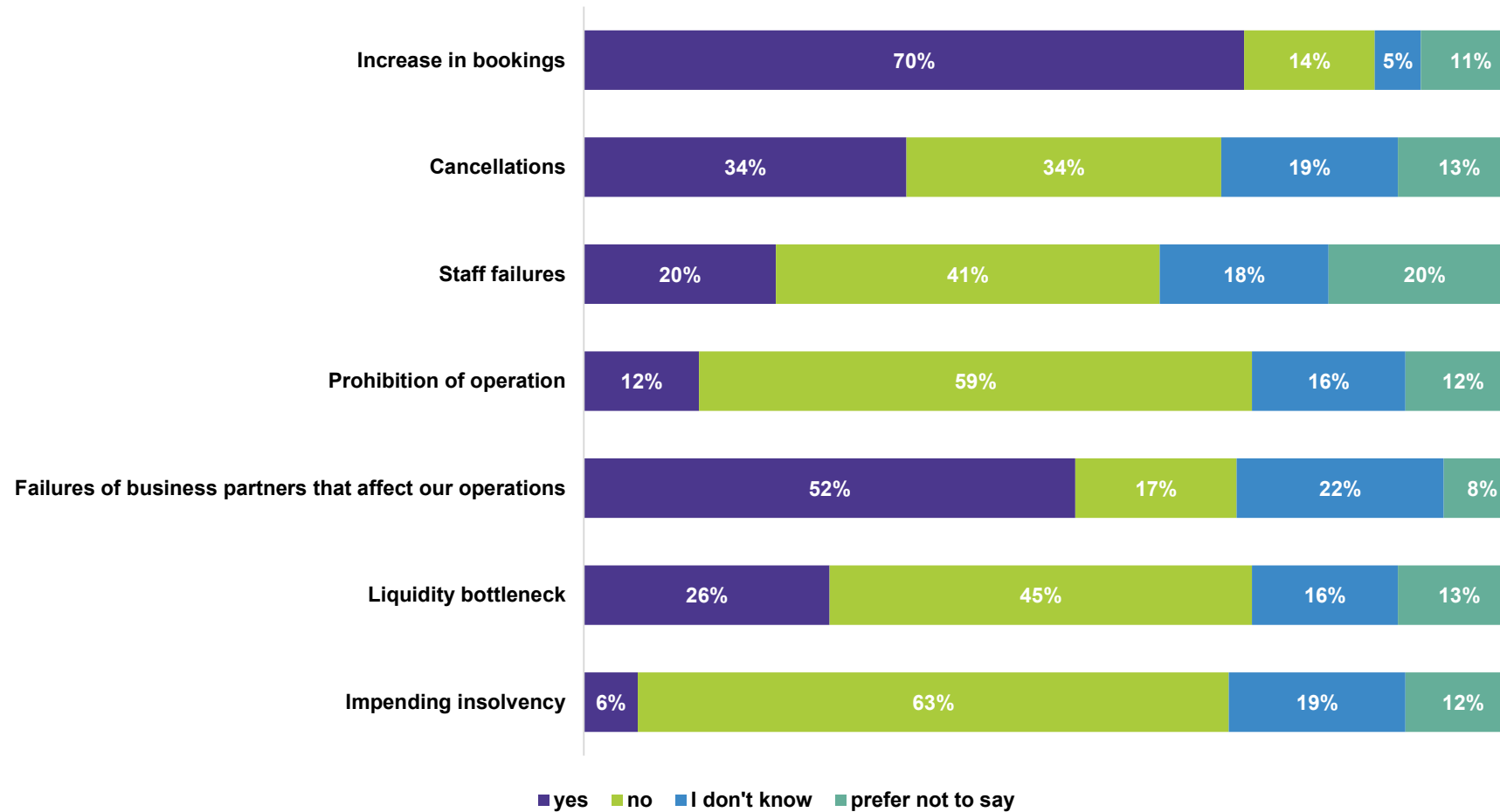
In general, with regard to the 2022 season, expectations on the river side are more positive.

Mean values on a 3-point scale of 1=positive, 2=neutral to 3=negative



# Expected economic effects

F15 What concrete economic effects do you expect for your company by the end of the 2022 season?



→ basically positive economic effects are expected by the end of 2022 season

except

- failures of business partners

not to underestimate

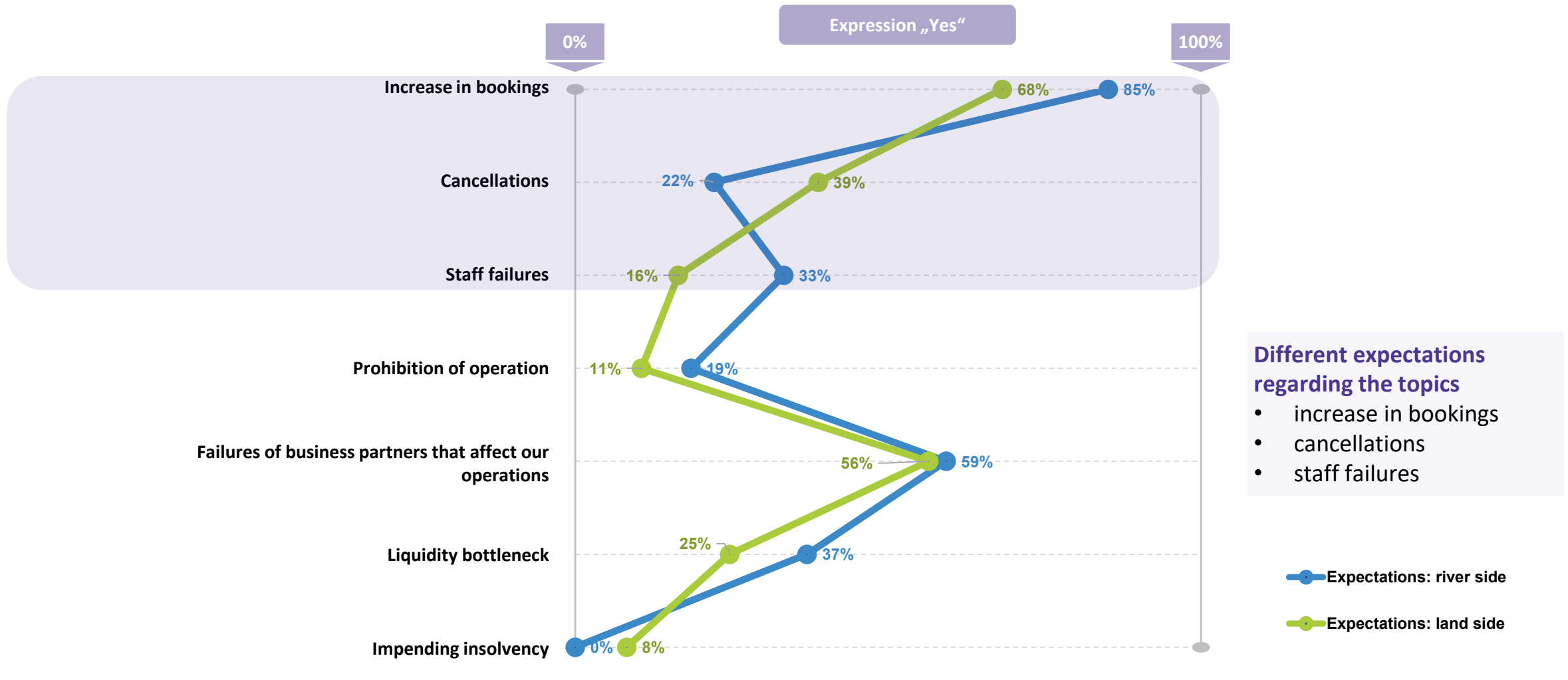
- cancellations
- staff failures
- liquidity bottleneck

N=122



# Expected economic effects by the end of 2022 season

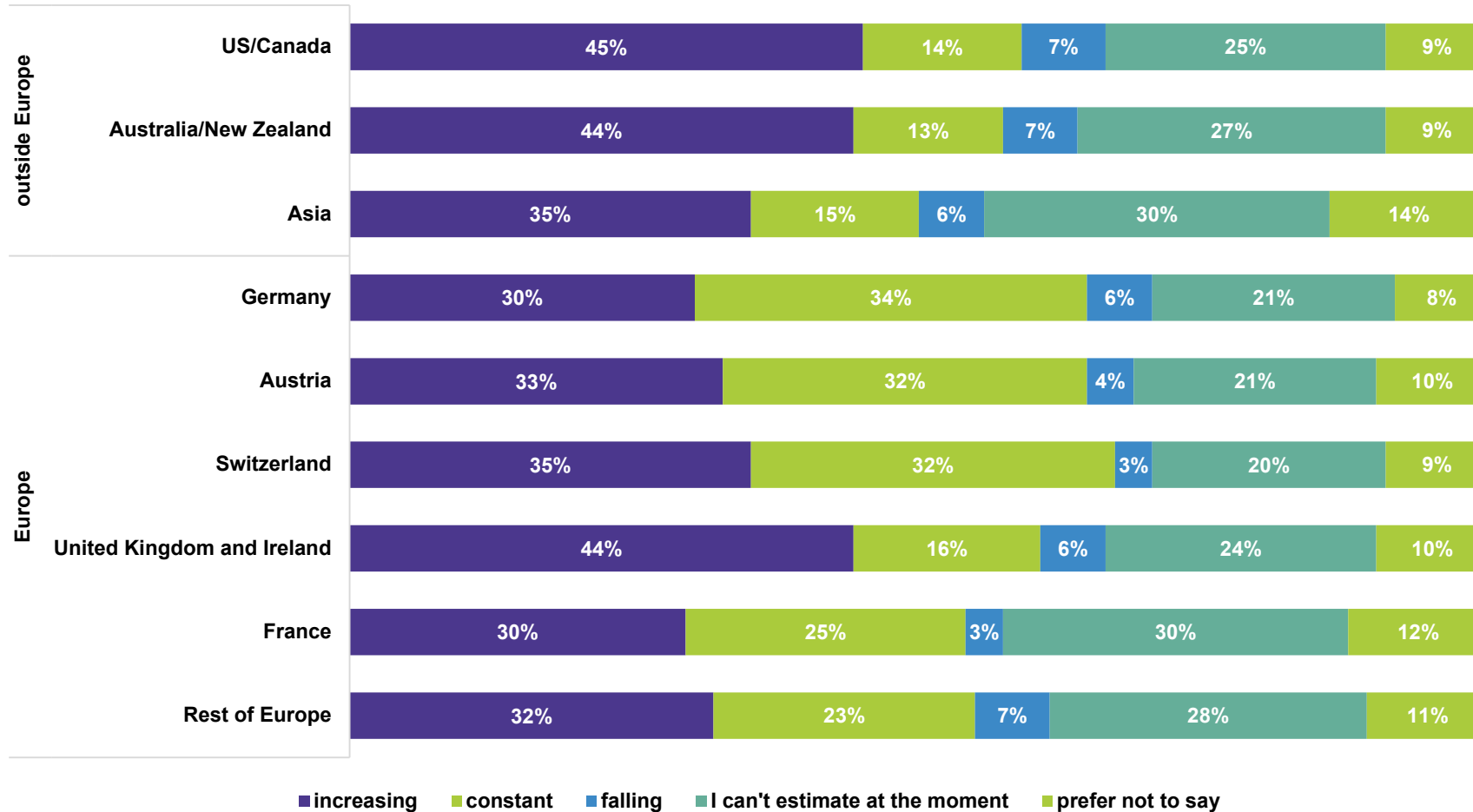
F15 What concrete economic effects do you expect for your company by the end of the 2022 season?





# Expected price development

F16 How will the prices for a Danube river cruise develop in the 2023 season? Please differentiate between the source markets and also take into account the costs for travel.



N=122

**Tendency to increase prices, especially for the source markets**

- US/Canada
- Australia/New Zealand
- United Kingdom & Ireland

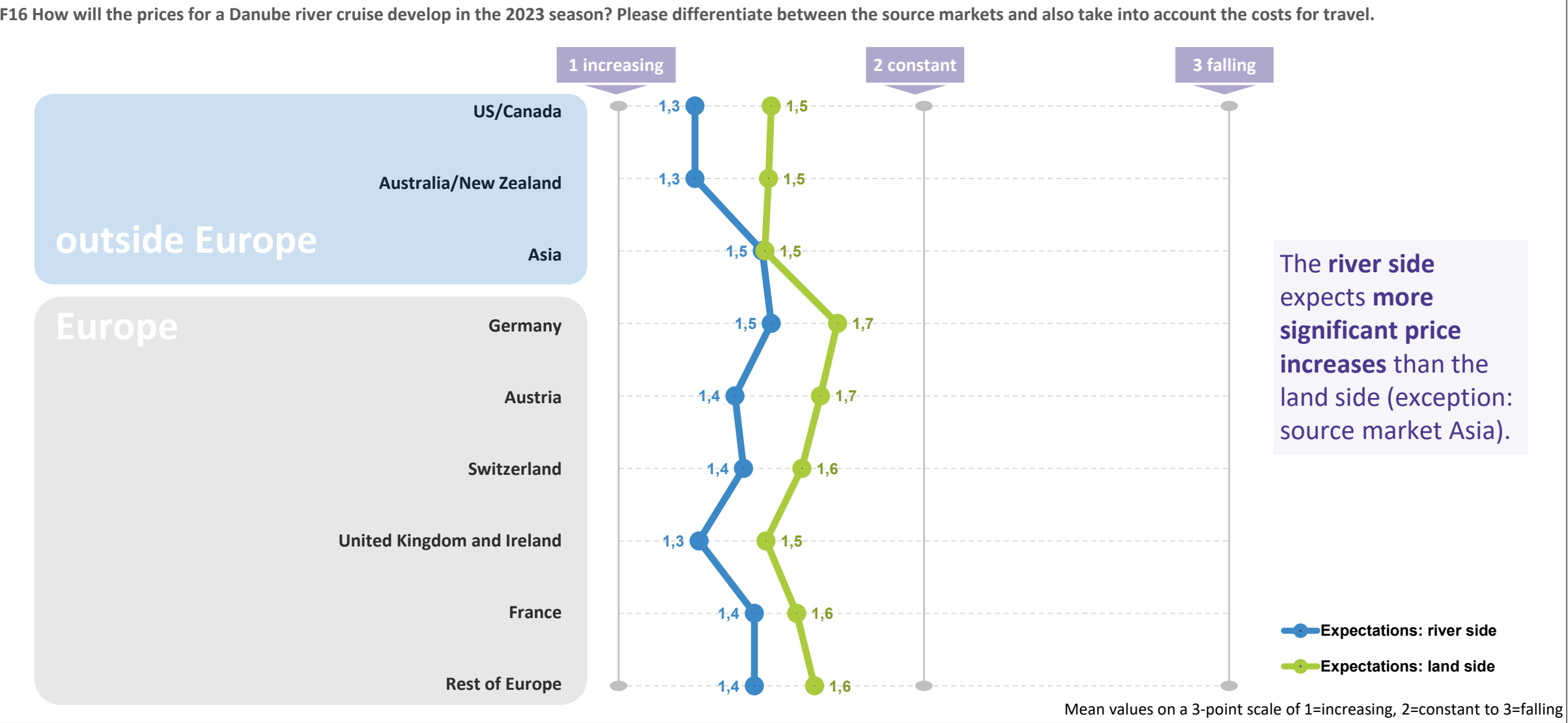
**In general**

The price development for the 2023 season is currently difficult to estimate.

**High uncertainty** especially for the source markets Asia and France.



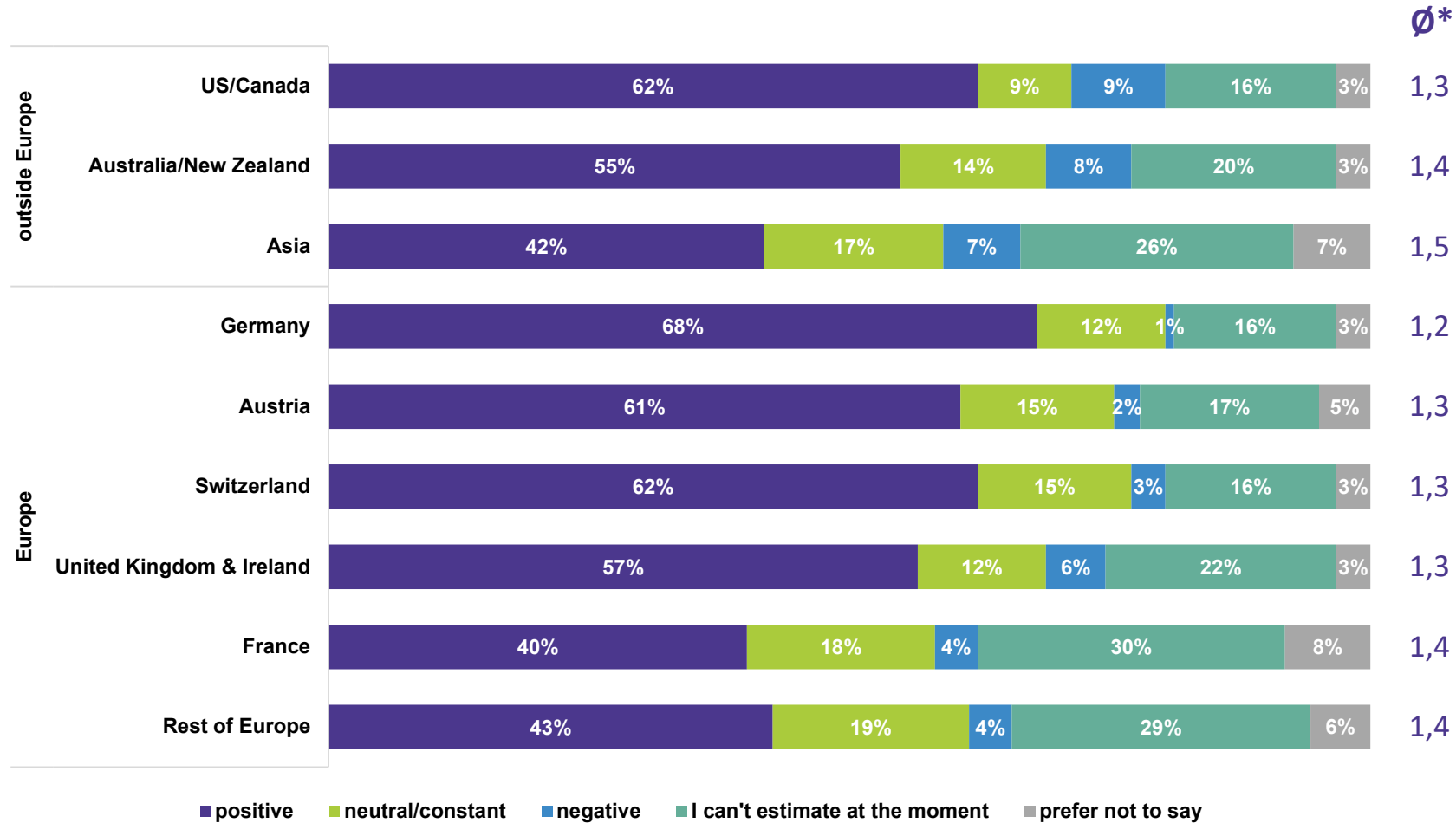
# Expected price development





# Expected development of demand in the 2023 season

F17 How do you estimate the demand for Danube river cruises in the 2023 season? Please differentiate again between the source markets.



## Positive expectations for

- the D-A-CH source markets
- US/Canada
- United Kingdom & Ireland
- Australia & New Zealand

## Difficult to assess, but the expectations tend to be positive

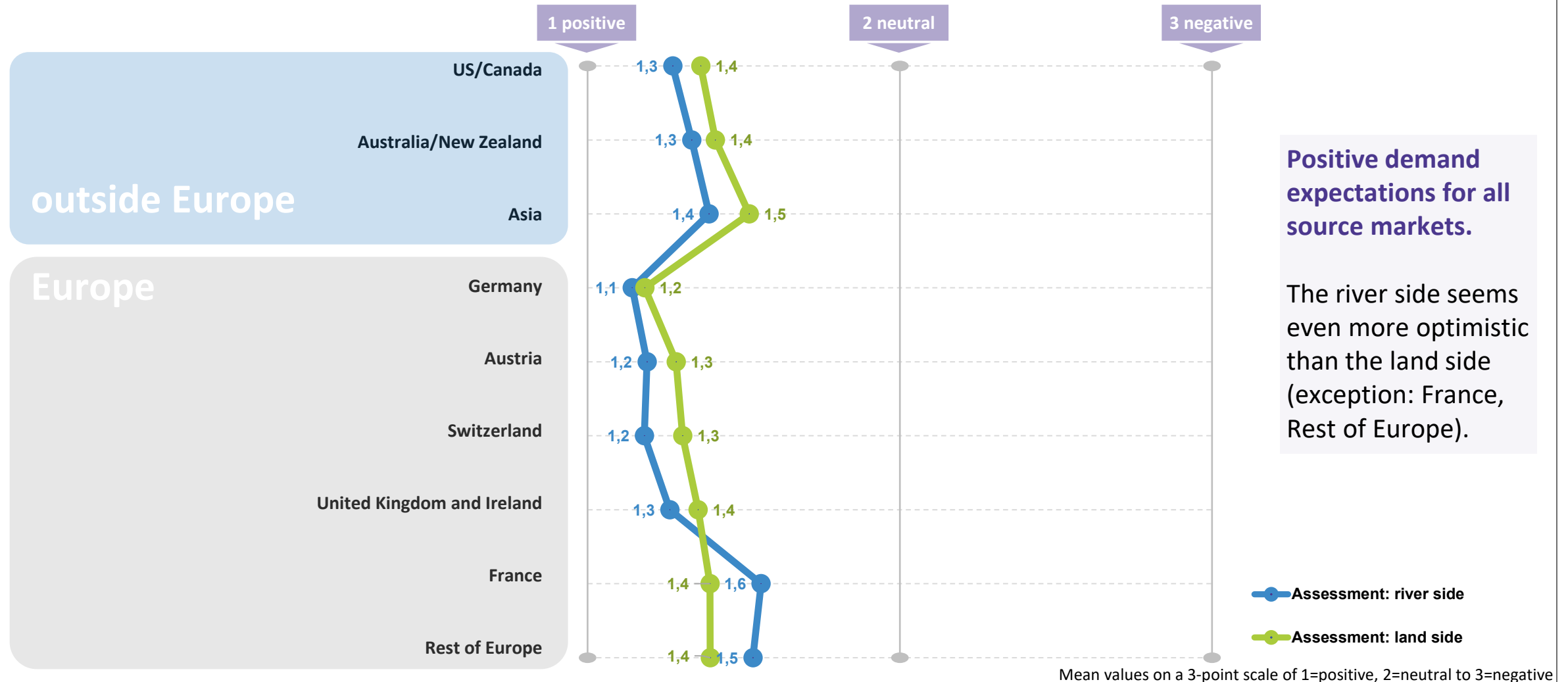
- France
- Rest of Europe
- Asia

N=122



# Expected development of demand

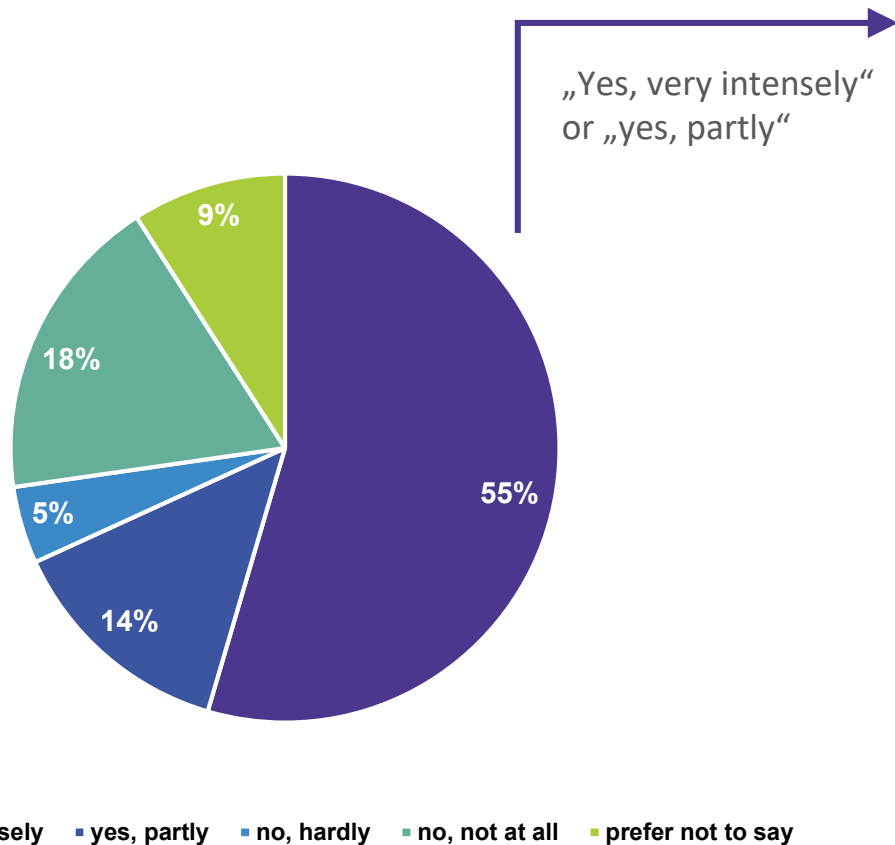
F16 How will the prices for a Danube river cruise develop in the 2023 season? Please differentiate between the source markets and also take into account the costs for travel.





# Reorganization of schedules

F18 Have you reorganized your schedules with the beginning of the pandemic in order to achieve the best possible utilization of your fleet?



N=22; Base: Shipping companies, tour operators (or both)

**We have shifted our focus to the following cruising areas:**

**Reasons:**

German rivers

proportion of passengers

less capacity on Danube/Rhine

balancing demand

Rhine/Main, Danube to Passau

Danube countries are currently difficult to assess

Rhine, Douro

simpler bureaucracy / coordination processes

Netherlands and Belgium

France failed

ports along the Danube that were not classified as risk areas, was very dynamic

Risk area in Germany

focus Rhine

Reduction of cross-border travel

central Europe

domestic-only cruises

N=9



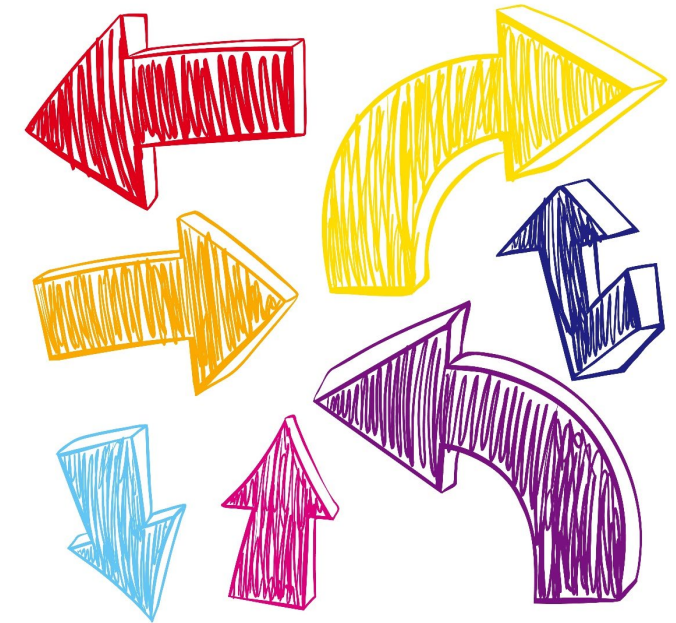
# Summary





# How is the crisis changing the market?

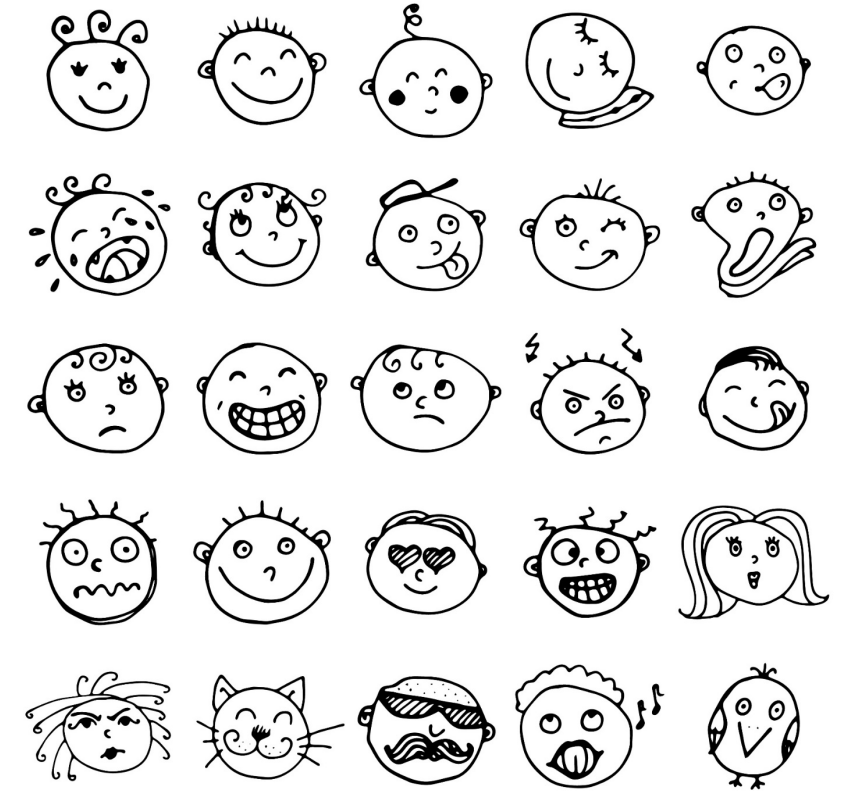
- Some industries are (very) **threatened by the crisis**, especially industries of the river side, but also the city and tour guides, the gastronomy and hotel industry on land and providers of services on land.
- Accordingly, **market takeovers or mergers** are expected for these industries in particular: Shipping companies and/or tour operators, infrastructure service agencies and providers of services on land.
- Mergers or takeovers of **city and tour guides** are less expected. Nevertheless, here could also be a relevant gap in supply in the medium to long term. Possibly there will be too few qualified guides in the future to cover the entire market (not just river cruises).
- In the future, **bottlenecks** are expected **mainly on the land side**: At hotspots due to limitations, at insider-tip destinations due to increasing requirement criteria with regard to Covid, in the case of bus capacities and – independent of Covid - at the moorings due to the mandatory purchase of shore power. A shortage of guides is expected primarily by river side stakeholders. **On the river side**, bottlenecks in particular with regard to the number of ships and service providers are expected (especially from river side stakeholders).
- The crisis is possibly an **opportunity for insider tips**: It is expected that passengers will ask more often excursion destinations away from the tourist highlights. There may also be a permanent rethinking among passengers.
- The industry **will also have to deal with hotspots in the future**: Almost one in two respondents rejects the statement that you don't have to worry about hotspots in the long term.
- The **impact of Covid on the (negative) welcome culture** in some destinations is assessed differently by the respondents. The land side is more likely to see a negative development than the river side.





# What is the mood in the industry?

- The mood within the industry is certainly **not relaxed**, stakeholders **feel uncertain** and they are understandably **annoyed** by the current situation. Nevertheless, all stakeholders are **confident, determined** (especially those on the river side) and **remain calm**.
- The **revenue drop in 2020** was enormous: On average, the river side recorded -88% of the previous year's sales, while on the land side it was even -92%.
- 68% of respondents also rate the **current business situation** as negative (stakeholders on the land side: 74%, stakeholders on the river side: 56%).
- **High flexibility and spontaneity** in the industry: About two-thirds of the stakeholders on the river side changed their travel areas at the beginning of the pandemic in order to offer as many trips as possible.





# What are the expectations for the near future?

- **First markets to come back** are Germany, Austria and Switzerland (the “D-A-CH”-markets). The markets Australia/New Zealand, US/Canada and Asia **will react rather cautiously**. **Difficult to estimate** are the source markets Asia, France and Rest of Europe.
- The **business expectations** for the 2022 season are predominantly **positive**. Despite this, **human resources planning** and **investment plans** for 2022 are **mostly neutral** or **cannot be evaluated** at this time. Expectations tend to be more negative on the land side than on the river side.
- The majority of respondents (70%) expect an **increase in booking numbers** for the 2022 season. However, about one third of those surveyed also expect **cancellations** for 2022. Around one in two respondents see the **failure of business partners** as a major risk for their own business success. Staff failures, prohibition of operations, liquidity shortages and impending insolvency are not expected at the end of 2022.
- **Price increases** for the 2023 season are **expected for all markets**, but in particular for the source markets **US/Canada, Australia/New Zealand** and **UK & Ireland**. This may also be related to the fact that travel from these markets is becoming more expensive due to **limited flight capacity**. More than half of respondents expect a reduction in capacity for intercontinental flights in the medium term. Basically, however, the price development for the season after next is still difficult to estimate. **Great uncertainty** exists in the markets of **Asia** and **France**. Stakeholders on the river side expect price increases more clearly than stakeholders on the land side. At the same time, stakeholders on the river side expect a more **positive development of demand** than on the land side, although here too the trend is very positive (especially for the D-A-CH-markets).
- Stakeholders (especially on the river side) do not expect the **older target group** to react cautiously. But in the future, vaccination is expected to be compulsory.



# Will we be able to return to the success we had before Covid?

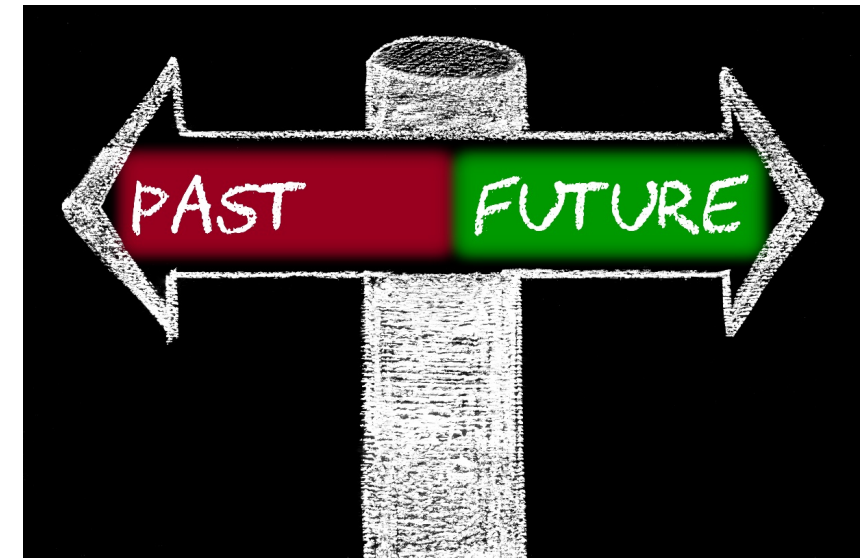
- The industry will probably be able to build on the successes of the 2019 season **at the earliest in the 2022 season**. The D-A-CH markets and other European markets will be the first to return to normality.
- The **long-distance markets** US/Canada and Australia/New Zealand will probably have to wait a year longer.  
**Remark:** For these markets to be able to regain momentum, there must be regulated flights. Political statements could also influence developments.
- None of the core markets relevant to the Danube are expected to return to the level of 2019. So it's only **a matter of time before the industry can build on previous successes**.





# What fundamental changes will all those involved have to adjust to?

- **General hygiene rules on board and ashore**, combined with a vaccination certificate, are intended to **make the river cruise permanently safe**.
- In addition, **further Covid regulations are likely to prevail in the long term**: smaller groups for excursions, stronger focus on insider tips, a slot system coordinated with all areas, capacity limitations and sophisticated visitor flow management at tourist hotspots.  
**Remark:** Not all of these measures involve significant additional costs – optimization measures generally lead to cost savings. And: The necessary change from hotspots to insider tips could be a great opportunity for the land side.
- In general, the **exchange between the land and the river side** will have to be intensified in the future in order to be able to implement all these measures.
- Shorter mooring times, fewer passengers per ship and seasonal interruptions due to increasing infections **are probably only of a short-term nature**.
- Stakeholders on the land side tend to view the measures more long-term than stakeholders on the river side do.







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## PROJECT MANAGEMENT

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Picture source: Colourbox