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Determinants and directions of change in the European river cruise market

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Abstract

The European river cruise market is the leading cruise market in the world and is also one of the fastest growing tourism segments in Europe. However, the demand structure of the European river cruise market has seen significant changes over recent years, and the aim of the studies described in this article was to identify the determinant factors and the ensuing changes in supply and demand within this market. The primary trend observed was a shift in demand, as the share of tourists from outside Europe has been growing with the share of Europeans (to date, the main group of customers) shrinking. These changes are attributable to social, economic, political, and technical factors that have resulted, in particular, in changes in river cruise passengers' preferences, which in turn have led to specific reactions by river cruise operators. The analyses have shown that river cruise passengers, who are seem increasingly interested in being educated about the local culture, traditions, ecology, wildlife, arts, foods, and history, expect that the river cruise offer will be extended to include new destinations. They also expect an extended offer of wellness-related services and more active river cruises, as well as high-quality passenger space on board ship. In response, European river cruise operators have developed a cruise network and a fleet of river cruise vessels based on these emerging river cruise markets and increased the diversity and comprehensiveness of their offered services. The evolution of the European river cruise market will also constitute a challenge for emerging river cruise destinations, which will need to meet the changing expectations of both passengers and operators.

Introduction

In the European transport system, inland navigation is still associated primarily with freight shipping, a transport mode that, to a large extent, fulfils the expectations of sustainable development (Kotowska, Mańkowska & Pluciński, 2018). However, over recent years, a decline in inland shipping has been observed in the modal split of European freight transport, for which small increases on the main European routes only partially compensate (CNNR, 2018). In addition to the market factors, the recent decline in inland shipping can be attributed to difficult navigation conditions (low/high navigable water) on the main European inland waterways. At the same time, river cruising – the tourism function of inland waterway transport – has exhibited fast growth. Like ocean cruising or barge cruising (Cooper et al., 2019), river cruising is a form of water tourism and is a manifestation of the role of rivers in tourism (i.e., river-based tourism) (Prideaux, Timothy & Cooper, 2009).

Since 1992, i.e., the year of the commissioning of the Rhine-Main-Danube canal connecting the basins of the North Sea and the Black Sea, the European river cruise market has been the leading cruise market in the world and is one of the fastest growing tourism segments in Europe (CNNR, 2018). The demand for river cruising in Europe is to a large extent generated by passengers who have so far taken sea cruises, as well as tourists who like to combine leisure time with sightseeing. The changes simultaneously taking place in that market are determined by social, economic, political and technical factors, in particular, changes in river cruise passengers' preferences, which, in turn, lead to specific reactions on the supply side – i.e., by river cruise operators. The aim of the studies described in this article was to identify the determinant factors and the ensuing changes in supply and demand of the European river cruise market.

In contrast to ocean cruising, the river cruise market is rarely addressed in the academic literature. The majority of the existing studies focus on various aspects of interactions between river cruise market development and port cities/river cities development. In particular, there is a research gap regarding the changes taking place in the river cruise market, and this paper seeks to remedy this issue.

Literature review

River cruising is defined as a form of water tourism enjoyed on board luxurious river cruise ships making their way along inland waterways. Cruises may take a few days and cover small distances, or a few weeks and include visiting various tourist attractions (Steinbach, 1995, Mańkowska & Mańkowski, 2011). This form of travelling combines leisure and sightseeing options, making exploration of historic towns and cities in Europe possible. A typical river cruiser has an average capacity of around 100 to 250 passengers, compared to an average of over 3,000 passengers on mega cruise liners (World Cruise Network, 2019). As Kaup and Łozowicka (2018) stress, in contrast to the freight shipping function, the tourism function of inland navigation satisfies the need for both travelling and sightseeing. The extent to which the need for travelling may be satisfied is limited by the technical infrastructure of the inland waterway, which determines the type of fleet that may be used and the quality of service offered in sea- and inland ports (Woś, 2005, Kaup & Chmielewska-Przybysz, 2011, 2013, Pomianowski, 2018). Any needs in that respect are reported by river cruiser operators. Tourists choose this form of water tourism out of an urge to travel, as river cruising is a tourist product that competes with other forms of tourism (Mańkowska, 2013). The extent to which the urge to travel is satisfied depends on the tourist offer on board (which differs for various vessel types) and the tourist offer on land. In this context, it is important to integrate the offer available on board with the activities taken by individual entities responsible for developing water tourism products at the destination. That is, river cruise products must be carefully integrated with the tourist products offered on land (Mańkowska & Mańkowski, 2011).

On the basis of the Danube-related experience, Dragin et al. (Dragin et al., 2007) analysed the impact of river cruising on the levels of regional and local development. As the authors point out, river cruising may be the starting point for creating a combined tourist offer by riverine regions across different countries and have a positive effect on their growth as a consequence of the direct and indirect outcomes of tourist traffic development. Based on the case study of the Singapore River thematic zone as identified by the Singapore Tourism Board, Savage et al. (Savage, Huang, & Chang, 2004) point out that river-based tourism can ensure sustainable urban tourism, based especially on its cultural districts and heritage sites. Citing the case of the Brisbane River (Australia), Marzano et al. (Marzano, Laws & Scott, 2009) point out the importance of cooperation between various entities responsible for developing river cruise products at destinations, at the same time identifying the key barriers and ensuing conflicts in the area of promoting river tourism as part of the tourism destination brand. Sun and Jiang (Sun & Jiang, 2010) analysed the factors that stimulate the development of river cruising at destinations. Based on the experience of Huangpu River Cruise, in Shanghai and during the 2010 Shanghai World Expo, they indicate the important role of organising mass events in the riparian areas as a river cruise promoting factor. Analysing trends in the river cruise market in Europe over the years 2000–2006, Vojvodic (Vojvodic, 2008) notes first and foremost an increase in popularity of less-known rivers, development of thematic cruises and of winter cruises (thereby extending the season), and increased sizes of river cruisers, at the same time stressing the significance of climate change in this market's growth. Ružić et al. (Ružić, Bosnić & Kelić, 2018), focusing on the supply side of the market and addressing the issues of marketing communications on the river cruise market, point out the key determinants of the application of marketing communications to achieve the business goals of riverboat operators under strong market competition and challenging demand. While examining the potential impacts of generational changes on the river cruise market, Cooper et al. (Cooper et al., 2019) point out that further changes in tourism motivations will significantly influence the market, as the so-called Generation X will take over and replace the current generation of baby boomers.

The aim of this article is to verify and supplement the theoretical knowledge regarding the determinants and directions of changes taking place in the volume and structure of demand and supply in the river cruise market.

Methodology

The research methods applied in the study included one qualitative research method: analysis of documentation, which is the literature dedicated to river cruising as a segment of the tourist and transport market, as well as reports, market analyses, press releases, and published interviews with industry representatives regarding the river cruise market in Europe and worldwide. Particular attention was paid to analysing the data contained in reports issued by specialized organisations, analytical centres, and other entities involved in river cruise market research (i.e., travel bloggers), such as the Cruise Lines International Association (CLIA), the Central Commission for the Navigation of the Rhine (CNNR), Growth from Knowledge (GfK Global), and ForwardKeys, River Cruise Advisor.

Based on the literature review and the source data regarding the European river cruise market, identifying the major trends regarding changes in the volume and structure of demand and supply within this market was possible. The time scope of the analysis covered the period 2012–2017, and, additionally, some parts of the analysis also applied some data from the previous years in order to demonstrate rates of changes. Based on the conclusions drawn from the analyses, specifying the main determinants that currently influence demand and supply on the river cruise market and will have an impact on it in the future was possible. It was also possible to specify the primary directions of resulting changes in the demand and supply.

Analysis of changes in the volume and the demand structure of the European river cruise market

In terms of the fleet quantity, the world river cruise market can be divided into the European, Russian, Egyptian, and other markets, with the latter including the fragmentary markets of America and Asia. The Russian market, which was once dominant, is currently experiencing stagnation, mainly due to the lack of new vessels. Also, the Egyptian market, following the plunge in the tourist traffic in 2011, has been in decline. In contrast, a growing trend has been observed on river cruise routes in Asia and in both Americas. The markets demonstrating increasing importance include North America (the Columbia and Mississippi rivers), China (the Yangtze River), and Southeast Asia (the Mekong River). Also, the European river cruise market has been growing at a fast rate.

In 2017, more than 1.4 million passengers were travelling on river cruise ships in Europe, whereas in 2012 there were only 840 k (Table 1). The market growth rate slowed in 2016 and 2017, most likely due to political and economic factors (i.e., the terrorist attacks in Europe in 2015), leading to a decreased demand for river cruises in Europe, mainly among tourists coming from outside Europe (primarily from America). Hard navigation conditions on European inland waterways, caused by low water levels (CNNR, 2018), also affected transport volume.

Table 1. Number of passengers and passenger growth rate in the European cruise market (in thousands) in the years 2012–2017 (CNNR, 2018)

Year	No. of river cruise passengers (in thousands)	% change
2012	840	–
2013	853	2%
2014	1107	30%
2015	1330	20%
2016	1376	3%
2017	1425	4%

The European water trails are among the most frequently used river cruise routes in the world and comprise ca. 15,000 km of waterways (Schulz, 2009). The European inland waterways that are the most popular among tourists are mainly those in Western Europe, such as the Main-Danube Canal and the main currents of the Danube, Rhine, Main, Moselle, and Saar, as well as the Elbe and the canals in Holland (Table 2).

Table 2. Comparison of the number of cruise vessel transits on the main European routes in 2002 and in 2017 (CNNR, 2018)

River		Main-Danube Canal	Main	Rhine	Danube	Moselle	Saar
Q-ty of cruise vessel transits	2002	1697	932	869	326	413	151
	2017	3204	2543	1372	1289	1129	205
% change		295	173	128	89	45	21

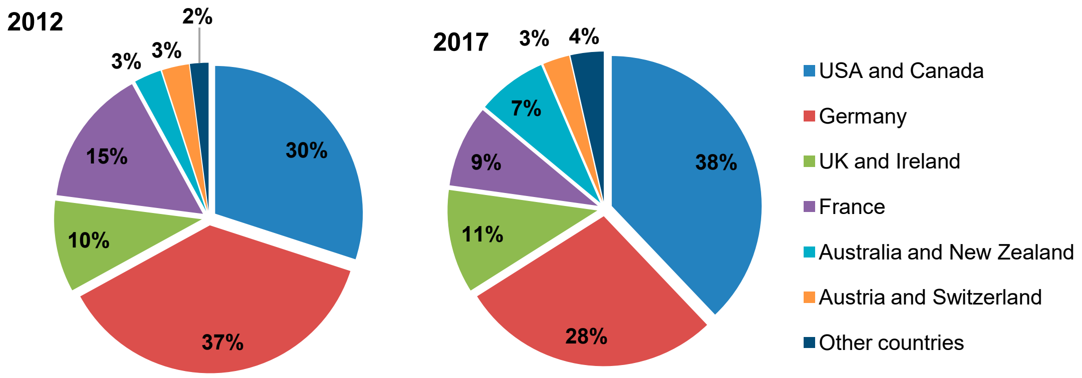

Figure 1. Structure of demand for river cruising in Europe by country of origin of tourists, in 2012 and 2017 (CNNR, 2018)

The river cruise passengers come mainly from the countries of Western Europe, predominantly from Germany, and also France, Great Britain, Holland, and Austria. Passengers from outside Europe come primarily from North America (predominantly the USA and Canada) and, recently, also from Australia, New Zealand, and China.

According to the data presented by CNNR (CNNR, 2018), the structure of the demand on the European river cruise market has been changing significantly over recent years. The share of tourists from outside Europe is growing, and the share of Europeans is shrinking. Since 2014, tourists from North America have been the largest group of river cruise passengers in Europe, outnumbering the citizens of Germany, who up to this point have been the most numerous group. Compared to 2012, the share of river cruise passengers from Germany rose by 29% in 2017, whereas for Canada and USA, it rose by 114%. In the years 2016-2017, a rise in the number of German tourists was seen only in relation to the Danube cruises (5%), whereas in the case of cruises on the Rhine (and its tributaries) their number fell by 11%, on the French rivers by 9%, and on routes including the Elbe, Oder, and Havel – by as much as 28%. In the same period, the number of German tourists taking other routes in Europe increased by 12%, and outside Europe – by as much as 36%. The relative decrease in the share of German tourists has been compensated for, not only by the increased share of citizens of the USA and Canada, but also by increases in numbers of tourists from Australia and New Zealand. In fact, the most significant growth rate on the European market, measured in 2017 in relation to 2012, was observed in the case of tourists from Australia and New Zealand (328%). According to the data provided by river cruise operators (Cruise Trade News, 2019), the share of tourists from China is also on the rise. At the same time, Asian routes are becoming increasingly popular among European river cruise passengers. One of 2019's most popular destinations has been the Mekong, which starts in China and runs through six countries to Vietnam.

River cruises are organised by cruise ship owners themselves, acting in this case as tour operators, or tourist companies that charter the vessels from their owners. The major river ship companies or tour operators that offer river cruises, not only in Europe but worldwide, include first and foremost Viking River Cruise, Phoenix Flussreisen, A-ROSA, CrosiEurope, Uniworld Boutique River Cruise Collection, AmaWaterways (APT), Tauck, Scenic Cruises, Avalon Waterways, Crystal RiverCruises, Nicko Cruises, and Dertour Flusskreuzfahrten. The growing demand also translates into an increasing number of river cruisers, and the fleet as a whole is gradually being replaced with newer vessels. In 2017, the European market operated the largest river cruise fleet in the world, amounting to 346 vessels with 50,616 beds. Every year, new vessels are launched (17 river cruisers in 2017). In 2017, 153 out of 346 cruise vessels were registered in Switzerland, and another 62 river cruisers were registered in Germany (CNNR, 2018). Typical river cruisers are equipped with 65–85 cabins, and, on average, they carry under 200 passengers. The river cruiser fleet varies depending on the particular routes served by the vessels (Straubhaar, 2005). River cruisers also differ in terms of passenger facility standards, which are classified analogously to those of hotels, as, in addition to cabins, they also include bars, restaurants, libraries, shops, and wellness and spa centres. The parameters of the operated vessels must also account for the size and height restrictions imposed on European river ships due to lock sizes and bridge clearances. The biggest river vessels, in terms of technical parameters and passenger capacity, are operated mainly on the Danube, Rhine, Moselle, and on the waterways of Russia and the Ukraine. Today, most of the vessels operating on the European market are

110–135 m in length, with beams (widths) of 11.4–11.45 m. This is the maximum width allowed to pass through locks that are 12.0 m wide (CNNR, 2018). The largest river cruise vessel ever built for Europe, the AMAMAGNA (carrying max. 194 passengers) is currently under construction and will be launched (on the Danube) in 2019.

Identification of determinants and directions of changes in the demand for river cruising in Europe. Implications for river cruise operators

The analysis of the changes in volume and structure of the demand for river cruising in Europe shows that the market is influenced by social, economic, political and technical factors.

The social determinants that have an effect on the river cruise market in Europe pertain, in particular, to the changes in the demand age structure (generation changes) and the new group of customers entering the market (so-called non-cruisers). As for the changes in the age structure, compared to 2016, in 2017 the greatest increase (67%) still pertained to the baby boomer generation (born in 1948-1966), the traditional river cruise customer group. Nevertheless, over the analogous period, there was a steady increase in the shares of new customer groups: by 42% in the so-called Generation X (1967-1981) group and by 36% in the Generation Y / Millennials (born after 1981) group. The market also attracts non-cruisers to cruising, as confirmed by 80% of travel agencies that offer river cruises in Europe (Marcellin, 2019). These changes mean that cruise operators will need to adapt to the preferences and needs of new customer groups.

Political determinants also affect the volume and structure of the European river cruise market, as demonstrated by the drop in the number of American tourists on the European river cruise market in the wake of the terrorist attacks in Europe in 2015. An analogous situation took place in other areas (e.g., the Nile). Another significant determinant affecting consumer decisions is policies pursued by governments in the source countries of river cruise passenger traffic. For instance, river cruise operators noted that British customers, who constitute a considerable segment of river cruise passengers in Europe, had concerns connected with the UK's leaving the EU (Brexit), which affected their decisions concerning holiday bookings (Clausing, 2019). ForwardKeys (ForwardKeys, 2019) indicated that summer bookings from the UK to EU countries in 2019 were lagging 4.6% compared with 2018. At the same time, destinations in the southern Mediterranean, e.g., Turkey, increased by 31%. Thus, uncertainty connected with the effects of foreign policies resulted in shifting the demand from the European market to alternative river cruise markets in other parts of the world.

There are also both macro- and micro-scale economic determinants. Macroeconomic determinants are related primarily to the situation on the stock market, exchange rates, and price levels in the countries of river cruise passenger destinations. These exert a significant influence on decisions taken by river cruise passengers and non-cruisers. The survey made by CLIA and GfK (CLIA & GfK, 2015) indicates that price is one of the biggest barriers to attracting new customers to the river cruise market in Europe. Microeconomic determinants, in turn, relate mainly to the intensity of competition on the market, and they lead directly to changes on the supply side. As CLIA and GfK (CLIA & GfK, 2015) stress, competition with the river cruise market takes two forms: with other river cruise operators and with other types of holidays, referred to as intrabranch and interbranch competition, respectively. Intensity of intrabranch competition is determined predominantly by changes in customers' preferences in connection with the quality of service and the attractiveness of cruise routes, as confirmed by the long-standing, established competitive position of the biggest operators that developed their operations in the 1990s, such as Viking River Cruisers or CroisiEurope, and in the 2000s, like AmaWaterways (APT) or A-Rosa. Outstanding customer loyalty underlies their business success. The intensive market growth observed over the recent years invites increased competition in this sector and encourages new players to enter the market, as exemplified by the fast growth of Emerald Waterways (since 2013) and *Crystal River Cruises (since 2016) that so far has been a leader on the ocean and river cruise market.* As for the interbranch competition — CLIA and GfK (CLIA & GfK, 2015) and Clausing (Clausing, 2019), Cruise Trade News (Cruise Trade News, 2019) have shown that the general awareness and knowledge of river cruise tourism products are relatively low compared to other forms of tourism. River cruising is a relatively new type of holiday, especially compared to beach holidays and city breaks. Consequently, winning new customers, especially younger ones, is still a challenging task for the operators. At the same time, surveys have shown that 42% of those who actively looked into river cruise holidays but did not book one ended up booking a city break instead. This is indicative of similar tourist preferences in choosing the two types of holiday (cultural immersion, variety, excursions, education), and the criterion that differentiates them is predominantly the higher price of river cruises compared to city breaks. On the other hand, once acquired, river cruise passengers tend to be loyal customers. CLIA (CLIA, 2018) indicated high satisfaction with river cruises (81%) compared to ocean cruises (73%) and land-based hotels and resorts (62%), which inclines tourist to choose this form of tourism in subsequent years.

Technical determinants directly affect the functioning conditions of river cruise operators and refer to navigation conditions on waterways, which depend on the quality of the infrastructure and climate changes. Navigation conditions on waterways, connected with both low or high water levels, hinder navigation or periodically make navigation impossible (e.g., the flood on the Danube in 2013 or historically low water levels during sailing months on the Danube and the Rhine rivers in 2018). Such conditions place limitations on the operators, who are often forced to exclude attractive destinations that are desired by cruise passengers (e.g., Prague).

Challenging navigation conditions in combination with restrictions regarding the size and height of vessels travelling on European rivers, along with the fast growing river traffic, lead to the risk of congestion on waterways and subsequently to decreased navigation safety.

The social, economic, political, and technical factors discussed above determine specific changes on the market, which are manifested primarily via changes in the preferences and needs of river cruise passengers (see Figure 2).

One of the most noticeable changes in preferences is that river cruise passengers look for new river cruise itineraries. The so-far traditional and well-established river cruise customer group, made up of the baby boomer generation, has already penetrated the main European routes and is now looking for new river cruising emerging markets, also outside Europe. Facilitating this has been the development of air transport, which increases the availability of new destinations, in particular when there is a considerable distance between the inbound and outbound countries. This fact is particularly important taking into account the dominating age groups of river cruise passengers, i.e., primarily people aged 55+, experienced travellers, well-educated travellers, and those interested in culture and history, with relatively high incomes (Straubhaar, 2005). Thus, specified needs of river cruise passengers lead to shifting some of the demand created by the key passenger groups (citizens of Germany) from the traditional European market to the European emerging markets or markets outside Europe (see Figure 1). However, thanks to the attractiveness of this sector as such, the increase in demand in new customer groups compensates for the decline in the demand in this passenger segment.

Another significant change in the preferences and needs of river cruise passengers as well as non-cruisers who are interested in taking a cruise is the increased importance of landscape and education aspects of a river cruise. The increased importance of such aspects is observed predominantly among well-established and experienced tourists, i.e., the baby boomer group. As Marcellin (Marcellin, 2019) indicates, river cruise passengers are much more interested in being educated than ocean cruise passengers. Consequently, tour operators to an increasingly greater extent focus on developing a range of excursions and ship-board experiences that educate the guests on the local culture, traditions, ecology, wildlife, arts, foods, and history. Another change of key importance taken care of by river cruise operators is the increased segment of passengers who prefer wellness services and active river cruises. This change has resulted in remodelling the passenger space on board ship (i.e., to develop wellness and

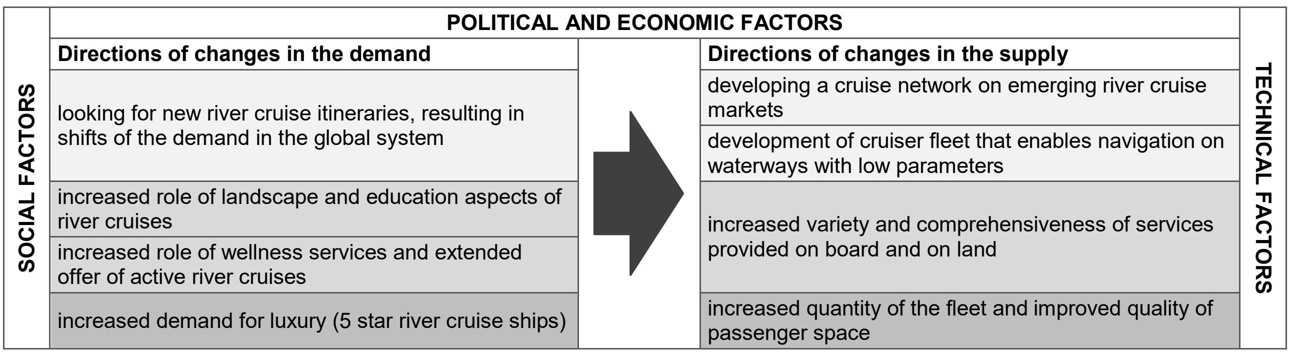

Figure 2. Major directions of changes in the demand and supply on the European river cruise market

spa studios) and in offering more active options on board and at destinations, such as hiking and cycling excursions. River cruise passengers also expect increasingly luxurious ships with increased space allocated to staterooms and a greater number of facilities.

The changes in demand affect the decisions taken by river cruise operators. One of the most discernible directions of the market development is increasing the diversity and comprehensiveness of river cruise products. River cruise operators systematically extend the range of offered services towards all-inclusive itineraries. In addition to extending the scope of basic services connected with organising river cruises, they also systematically broaden the assortment of additional services connected with organising the river cruise passengers' stay ashore (excursions included), door-to-door transfers, and covering extra costs such as, e.g., port charges (River Cruise Advisor, 2019). Measures taken in that respect are carried out in cooperation with a number of entities operating in the transport, tourist, catering, or insurance sectors. In the context of meeting the expectations regarding new itineraries, taking into account the considerable distance between the source and destination of tourist traffic, the matter of key importance is in particular ensuring the availability of transport to the embarkation and disembarkation ports. In view of the growing share of tourists from outside Europe in the structure of the European river cruise market, cooperation with entities operating in the transport sector is of key importance. To this end, the biggest river cruise companies cooperate in close partnerships, e.g., Viking River Cruise with British Airways and Eurostar high-speed service connecting London to Paris, Lille, and Brussels via the Channel Tunnel, as an alternative to flying.

Changes in preferences and needs of the river cruise market as well as technical factors have an impact on the varying quantity and structure of the European river cruise fleet. Changes in the structure of the fleet employed on European routes are manifested mainly by launching new vessels that offer larger and more diverse, high-standard passenger space and that are referred to as "floating boutique hotels" with "more suites, more dining venues and more luxurious finishes, while maintaining a 2:1 staff to guest ratio" (Marcellin, 2019). At the same time, new vessels do not differ much from their predecessors in terms of technical parameters (width, length, and draught), which are limited by the already mentioned navigation restrictions on the European waterways (due to lock sizes and bridge clearances). The size and height restrictions placed on European river ships is not a concern, e.g., in Southeast Asia. Therefore, bigger vessels with larger cabins and increased public space are used by European river cruise operators mainly on the routes outside the continent. An important area of measures taken by operators to mitigate the limitations connected with the navigation conditions determined by the technical parameters and the climate conditions on the European waterways is implementation of technological changes in production of river cruise ships. For instance, one of the directions of fleet development chosen by CrossiEurope is based on the application of paddlewheel systems (Riviera Newsdesk, 2015). The draught of paddlewheel ships does not exceed 80 cm, thus enabling their operators to organise cruises on routes that are inaccessible or hardly accessible but attractive in terms of landscape and education values (e.g., the Elbe cruises calling at Berlin and Prague, and also cruises in the shallow waters of the Loire, inaccessible to the traditional fleet at the time of low navigable water).

Conclusions

The European river cruise market has been growing intensively, as is manifested by the increasing number of river cruise passengers on most routes. Simultaneously, the results of the analyses presented in this article indicate that the fast market growth entails specific changes in its structure, in particular with regard to passenger preferences and needs. The main trend observed on the European market is the gradual shift of the main customer group (tourists from Germany) from the part of the European market comprising the canals and main currents of the Rhine, Main, and Danube to the less popular European submarkets as well as markets other than European, while at the same time the number of tourists from outside Europe continues to grow. The changes are determined by a number of social, economic, political, and technical factors (including those of an environmental nature). The impact of social factors is related primarily to the effects of generation changes in demand: Generation X and Generation Y are entering the market and replacing the baby boomer generation (in the future is also Generation Z). The impact of political factors is mainly connected with the effects of foreign policies of the tourist source countries and with the safety level in the tourist destination countries. The impact of the macroeconomic factors mainly pertains to the situation on the foreign exchange markets and the level of prices in the countries of the river cruise passenger traffic destinations. On the micro scale, these factors influence the intensity of intrabranch and interbranch competition. Technical factors affect the operation conditions of tour operators with regard to the operated cruiser fleet and the offered cruise routes.

The impact of the factors that determine the development of the river cruise market in Europe is reflected by the changes in the volume and structure of the demand, which results from the changes in preferences and needs of river cruise passengers. As the analyses have shown, river cruise passengers expect that the river cruise offer will be extended to include new destinations (emerging river cruise markets). Moreover, they are more interested in being educated about the local culture, traditions, ecology, wildlife, arts, foods, and history and also expect an extended offer of wellness-related services and more active river cruises, as well as high-quality passenger space on board ship.

Changes on the demand side entail changes on the supply side. River cruise operators in Europe take measures aimed at meeting demand-side expectations, including in particular development of the cruise network based on the emerging river cruise markets and development of the fleet (increased number of vessels, increased quality of the passenger space, development of the fleet such that it can navigate on low-quality waterways). River cruise operators thus are systematically increasing the diversity and comprehensiveness of offered services, an action that involves the increased importance of cooperation with other stakeholders aimed at creating an attractive river cruise product. One of the main challenges faced by river cruise operators is to keep the river cruise concept appealing, but at the same time to make river cruising a more attractive form of holiday for a new group of customers (in particular the younger generation of non-cruisers). This requires continuous monitoring of changes in the preferences and needs of the current and of potential customers. The evolution of the European river cruise market will also be a challenge for the emerging river cruise destinations, which will need to meet the expectations of passengers and operators alike.

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