



[The European market potential for cruise tourism](#)

Cruise tourism used to be a luxurious way of travelling for the rich. Nowadays, it is accessible for many Europeans, especially in Germany and the United Kingdom. There are many forms of cruise tourism. World and sea cruises normally use large ships, which may not be affordable for you as a small and medium-sized enterprise. In addition, most large cruise ships are not environmentally sustainable at all. As the demand for sustainable tourism increases, small sea and river cruises which contribute to local communities become more appealing for small and medium-sized tourism operators.

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1 . Product description

Cruise tourism can be defined as a luxurious, all-inclusive way of travelling usually for at least 48 hours following a specific itinerary and at which the cruise ship calls on a variety of ports and their connected cities or hinterland. It is a tourism product that offers and combines [attractions, activities, access, accommodation, and amenities](#). The nature of cruise ships makes them as destinations in themselves, where features and amenities are comparable or even superior to resorts on land.

According to [Kenniscentrum Toerisme](#), cruise tourism comprises a variety of different types of cruises, varying in duration and destinations:

- Expedition cruises: Special, normally inaccessible locations. The target group of expedition cruises is mostly curious, highly educated, nature focused and adventurous people. Ships are often small or medium in size with a limited depth to access more remote places. On-board facilities are fairly comfortable.
- River cruises: River cruise tourists spend several nights on board. Ships are reasonably small to be able to navigate close to river banks. River cruise companies focus mostly on couples and singles.
- Sea cruises: Sea cruises cover large distances, sailing the world's seas and oceans. Ships are large and very large including a wide variety of facilities and services to cater to different target groups. As a result of the size of the vessels, the ports that accommodate these ships need adequate facilities.
- Theme cruises: These are cruises that follow a specific theme throughout the journey, such as

- wine cruises, golfing cruises, cooking cruises, active cycling cruises, music and celebrity cruises.
- Mini cruises: These are regular cruises that last considerably shorter. Mini cruises start close to home, are cheaper and the ships are smaller.
 - World cruises: World cruises are cruises for travelling around the world in a relaxed way. They enable passengers to visit destinations scattered over continents and countries. World cruises have all the facilities passengers need and don't need, but prices are quite high. Departures from Europe are generally scheduled in January and journeys normally last between 60 and 100 days, stopping at 30 to 60 ports.
 - Transit cruises: In this type of cruise, the destination serves as a stopover. The destination welcomes passengers early in the morning or afternoon, so they can explore it. Their duration is between one and a few days. After one destination has been visited, the ship moves on to the next.
 - Turnaround cruises: These are cruises that start and return to the same destination. Cruise ships moor at ports for the purpose of embarking and disembarking passengers. For passengers, these ports may not be their desired destination, but they sometimes make use of the opportunity to make a tourism trip.

Tips:

- Focus on a cruise type that is feasible for you. Expedition cruises, [theme cruises](#), mini cruises, transit cruises and turnaround cruises may offer opportunities.
- Focus on activities and sights instead of luxury, as offering a high-level luxury requires big investments.

2 . What makes Europe an interesting market for cruise tourism?

The cruise industry is one of the largest growing sectors in the tourism industry. It has steadily been growing, even during the economic recession in the 2000s. Between 2009 and 2019, the number of cruise tourists worldwide rose significantly from 17.8 million passengers in 2009 to an expected 30 million in 2019. The industry continues to grow and expand into new destinations. This growth is fuelled by various trends, as described in the [CLIA 2019 Trends & Industry Outlook](#). More than 26.6 million tourists enjoyed a cruise holiday in 2017, [contributing €114 billion to the global economy](#).

After North America, Europe is the largest cruise market in the world, where it is the fastest growing tourism submarket. From 2016 to 2018, [passenger volume of cruises in Europe increased from 6.79 million to 7.17 million](#), of which 6.96 million were European residents.

The global cruise tourism market is expected to grow incrementally between 2018 and 2022 by 6%. According to the 2018 [Cruise Industry News Annual Report](#), the biggest growth in passenger numbers will come from Europe. By 2027, 51% of cruise passengers will probably be coming from North America (14% in 2019), 31.5% from Europe ([7.17% in 2019](#)) and 17.5% from Asia-Pacific (5.7% in 2019). That means that the growth rate of cruise tourism in Europe is anticipated to be bigger than in the US and Canada, but the absolute number of cruise passengers in Europe will not exceed the number in North America.

There are three major [factors driving the global growth](#) in cruise tourism:

- A strong economic recovery, causing an increase in consumer spending and a gradual increase in luxury lifestyle and leisure travel expenses.
- A substantial increase in repositioning cruises, which refers to moving a ship from one sailing destination to another. According to Technavio, [consumer interest in repositioning cruises](#) includes exploring different destinations and their price advantage when compared with regular

cruising. Cheap one-way flights for travellers to return to their homes or reach the ships in the first place are also an attractive factor.

- The growth of cruise ship capacity. According to the 2018 [Cruise Industry News Annual Report](#), ocean cruise ship capacity will increase by 48% from 2018 to 2027, from 26.7 million to 39.6 million passengers.

The following table shows the most visited regions with at least 4,000 passengers involving developing countries.

Table 1: Number of sea cruise passengers per destination region

Relevant destination regions	Number of cruise passengers 2018 (in 1,000)	2017 year-to-year growth	2018 year-to-year growth	Countries of origin (in descending order)
Eastern Mediterranean	745.8	-11%	+8%	Italy, UK and Ireland, Germany, Spain, France
Africa, Middle East	219.0	-4%	-9%	Germany
Asia and China	139.4	+9%	+9%	UK and Ireland, Germany
Exploration destinations *	78.4	+43%	+11%	UK and Ireland
Panama Canal, South America	61.8	+15%	+3%	UK and Ireland, Germany
Australia, New Zealand, Pacific	44.7	+8%	-4%	UK and Ireland
North America's West Coast, Mexico, California, Pacific Coast	18.0	-11%	+1%	UK and Ireland
Transatlantic, World Cruise	209.2	+8%	+17%	UK and Ireland, Germany

* Exploration destinations include, for example, the Arctic, the Galápagos Islands and Antarctica.

Source: [CLIA 2018 Europe Market Report](#)

European cruise passengers on transatlantic world cruises or travelling through the Panama Canal, to South America, Australia, New Zealand, Pacific, Asia and China have the highest average ages (58+) and make the longest trips (more than 12 days). To the Eastern Mediterranean, European passengers have the youngest average age (47) and do the shortest trips (approximately 8 days). Passengers to North America's West Coast, Mexico, California, Pacific Coast, Africa and Middle East have an average age of 51-52 and take a trip of 12-13 days.

Tips:

- Understand the market. Continuously collect data, facilitate market research, monitor the industry and consumer trends. A good place to acquire data is CLIA, which publishes an [annual market report about Europe](#) and other reports, such as the [Ocean and River Cruise Review](#).
- Develop new cruise products. Although cruising is already well developed as a product, you could focus on developing new products based on market analysis and feedback, keeping in mind the varied target audience.
- Target your customers via European cruise operators, regular tour operators, destination management companies, or directly. To reduce your dependence on one sales channel, sell your cruises via a variety of channels.
- Promote your region together with other potential destinations to CLIA Europe. [CLIA](#) is the global organisation of the cruise industry, which includes [CLIA Europe](#). It represents more than 50 cruise lines (ocean, river, and specialty cruise lines), 340 executive partners (key suppliers and cruise line partners such as ports and destinations, suppliers and business services), 15 thousand travel agencies and agent members worldwide.

3 . Which European countries offer most opportunities for cruise tourism?

In passenger volume, the two most important European markets for cruises are Germany and the combined market of the UK and Ireland. Together they accounted for nearly 60% of all European cruise passengers in 2018.

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The remaining cruise tourism markets in Europe's top six are Italy, Spain, France and Switzerland. All these countries show increases in passenger volume between 2016 and 2018, [the biggest](#)

[increases being in Italy and Spain](#). The tables below show which of these countries have the biggest potential for destinations (with at least 4,000 passengers) in developing countries.

Germany

Germany offers the biggest cruise market in Europe (31%), but growing little annually. Cruise holiday lengths also show small increases. The Caribbean, Bahamas and Bermuda are the most important destination for German cruise goers (10%-11%), followed by Africa and the Middle East (5%-6%) and the Eastern Mediterranean (5%).

Table 2: German cruise market key statistics

Year	Number of passengers (in 1,000)	Annual growth	Average duration in days	Average age
2018	2,233	3.0%	9.1	49
2017	2,169	7.5%	8.8	50
2016	2,018		8.8	50
Market share Europe 2018: 31%				

Source: [CLIA 2018 Europe Market Report](#).

Destinations in developing countries show a decline over the past three years. The decline is visible in the age groups 20-29 and 40+, especially in one-day cruises and cruises of 21 days or more.

Table 3: German cruise market most visited destination regions

	2018 (market share/ in 1,000 passengers)	2017 (market share / in 1,000 passengers)	2016 (market share / in 1,000 passengers)
Caribbean, Bahamas, Bermuda	9.5% / 210	11.1% / 236	11.4% / 222
Africa and Middle East	4.8% / 107	5.6% / 120	6% / 117
Eastern Mediterranean	4.5% / 100	4.6% / 97	5.3% / 104
Asia, China	1.9% / 42	2.8% / 59	3% / 58
Panama Canal, South America	0.7% / 17	0.9% / 19	0.9% / 17
Exploration destinations	0.9% / 20	1.1% / 23	0.6% / 12

Source: [CLIA 2018 Europe Market Report](#).

UK and Ireland

The UK and Ireland combined make up 27% of the cruise market in Europe, the second-largest share. Compared with the other top-five markets in Europe, cruise passengers from the UK and Ireland are the oldest (56-57 years) and take the longest cruise holidays on average (10 days). Market data shows a marginal increase of this market in the past two years and a marginal increase in holiday length.

Table 4: UK and Ireland cruise market key statistics

Year	Number of passengers (in 1,000)	Growth	Average duration in days	Average age
2018	2,009	2.0%	10.1	57
2017	1,971	0.5%	10.3	56
2016	1,960		10.4	56
Market share Europe 2018: 27%				

Source: [CLIA 2018 Europe Market Report](#).

Caribbean, Bahamas, Bermuda (14%-15%) and Eastern Mediterranean (7%-8%) are the most visited destination regions by British and Irish cruise travellers. Interest in Caribbean, Bahamas, Bermuda, and Asia, China, and Panama Canal and South America has been slightly increasing since 2016.

Table 5: UK and Ireland cruise market most visited destination regions

	2018 (market share / in 1,000 passengers)	2017 (market share / in 1,000 passengers)	2016 (market share / in 1,000 passengers)
Caribbean, Bahamas, Bermuda	14.7 / 295	14.1 / 276	13.8 / 268
Africa and Middle East	1.2 / 24	2.4 / 48	2.0 / 38
Eastern Mediterranean	6.9 / 137	7.3 / 144	8.2 / 159
Asia, China	3.2 / 63	2.3 / 45	1.9 / 37
Panama Canal, South America	1.3 / 26	1.0 / 20	0.8 / 16
Exploration destinations	1.2 / 32	1.1 / 22	1.1 / 22

Source: [CLIA 2018 Europe Market Report](#)

Italy

Italy is the third-largest cruise market in Europe, making up 12% of the total European cruise market. Interest in cruise holidays shows a clear increase in the past two years. Compared to the other top-five markets in Europe, Italian cruise passengers are the youngest on average at 43 and take the shortest cruise holidays on average (7 days), which has shortened marginally in the last three years.

Table 6: Italian cruise market key statistics

Year	Number of passengers (in 1,000)	Growth	Average duration in days	Average age
2018	831	8.0%	7.3	43
2017	769	2.5%	7.5	43
2016	751		7.5	42
Market share Europe 2018: 12%				

Source: [CLIA 2018 Europe Market Report](#)

Italians' interest in cruise holidays to the Caribbean, Bahamas, Bermuda has clearly increased over the past few years. Cruise holidays to Africa and Middle East show a small decline, mainly visible in the age group 20-39. From 2017 to 2018 all age groups showed increases. With reference to the length of the cruise, 1-3 day cruises, 8-13 day cruises and cruises longer than 21 days declined between 2016 and 2018, but probably due to economic recovery these figures were turned to strong growth again in 2018. However, the popularity of 15-20 day cruises has been declining, and this decline has been stronger in 2018 than in 2017.

Table 7: Italian cruise market most visited destination regions

	2018 (market share / in 1,000 passengers)	2017 (market share / in 1,000 passengers)	2016 (market share / in 1,000 passengers)
Caribbean, Bahamas, Bermuda	9.7 / 81	10.0 / 77	8.2 / 61
Africa and Middle East	2.9 / 24	2.6 / 20	4.0 / 30
Eastern Mediterranean	23.4 / 195	22.3 / 172	23.3 / 174
Asia, China	0.4 / 3		
Panama Canal, South America			
Exploration destinations	0.4 / 3	0.3 / 2	

Source: [CLIA 2018 Europe Market Report](#)

Spain

Spain's cruise market has a market share of 7% in Europe, which is similar to France's. Compared to the other top-five markets in Europe, the Spanish cruise holidays are the shortest (7 days), having reduced in length marginally in the last three years. The shares of cruise holidays to various destinations fluctuate from year to year.

Table 8: Spanish cruise market key statistics

Year	Number of passengers (in 1,000)	Growth	Average duration in days	Average age
2018	530	3.9%	7.3	46
2017	510	6.4%	7.5	44
2016	480		7.6	44
Market share Europe 2018: 7%				

Source: [CLIA 2018 Europe Market Report](#)

The most visited destinations by Spanish cruise goers are Eastern Mediterranean (16%–18%) and Caribbean, Bahamas, Bermuda (6%–8%). The latest figures show a small decline of visits to the Caribbean, Bahamas, Bermuda and a small increase to Africa and the Middle East, and Eastern Mediterranean. The decline was mainly associated with a decline in cruise popularity in all age groups older than 20 years. However, in 2018 all age groups showed a strong increase again. The decline in 2017 was mainly in the market of cruises of 15 days or more. In 2018, the longest category of cruises (21+ days) still showed a decline, whereas all other cruise lengths showed increases.

Table 9: Spanish cruise market most visited destination regions

	2018 (market share / in 1,000 passengers)	2017 (market share / in 1,000 passengers)	2016 (market share / in 1,000 passengers)
Caribbean, Bahamas, Bermuda	7.3 / 39	8.1 / 41	6.4 / 31
Africa and Middle East	1.7 / 9	1.1 / 6	1.9 / 9
Eastern Mediterranean	17.6 / 94	15.9 / 81	16.1 / 77
Asia, China	0.6 / 3		
Panama Canal, South America	0.4 / 2	0.6 / 3	0.5 / 2
Exploration destinations	0.5 / 2	0.5 / 3	

Source: [CLIA 2018 Europe Market Report](#)

France

France also has 7% of the European cruise market. Two destination areas stand out: Caribbean, Bahamas, Bermuda (21%-24%) and Eastern Mediterranean (11%-14%).

Table 10: French cruise market key statistics

Year	Number of passengers (in 1,000)	Growth	Average duration in days	Average age
2018	521	3.4%	7.9	49
2017	504	-9.1%	7.7	48
2016	554		8.0	48
Market share Europe 2018: 7%				

Source: [CLIA 2018 Europe Market Report](#)

It seems that the Caribbean, Bahamas, Bermuda region has become more popular in the past three years among French cruise travellers (from 20.5% to 23.3%), while the Eastern Mediterranean slightly less popular (from 13.6% to 12.7%). Travellers between 13 and 30 years of age and from 40 to 49 showed slightly declining shares in 2016-2017, but all age groups were on the rise again in 2018. Cruises of 4-6 days and 14 days showed sharp declines in 2018. Cruises of 8-13 days and more than 21 days also declined in 2017 but increased sharply in 2018.

Table 11: French market most visited destination regions

	2018 (market share / in 1,000 passengers)	2017 (market share / in 1,000 passengers)	2016 (market share / in 1,000 passengers)
Caribbean, Bahamas, Bermuda	23.3 / 121	24.4 / 120	20.5 / 111
Africa and Middle East	2.5 / 13	2.1 / 10	2.6 / 14
Eastern Mediterranean	12.7 / 66	11.1 / 55	13.6 / 74
Asia, China	1.0 / 5		
Panama Canal, South America	0.9 / 5	1.0 / 5	0.7 / 4
Exploration destinations	0.9 / 5	0.7 / 3	

Source: [CLIA 2018 Europe Market Report](#)

Switzerland

Switzerland has a small market share in the European cruise market of only 2%.

Table 12: Swiss cruise market key statistics

Year	Number of passengers (in 1,000)	Growth	Average duration in days	Average age
2018	154	1.5%	9.0	49
2017	152	3.2%	9.0	49
2016	147		9.2	49
Market share Europe 2018: 2%				

Swiss cruise holidaymakers most often go to destinations in the Eastern Mediterranean region (14%–16%) and the Caribbean, Bahamas, Bermuda region (10%–12%). These percentages show some fluctuation since 2016. In 2018, the age groups between 20 and 29 and those between 40 and 69 declined clearly in market share. All other age groups increased. Figures clearly show that cruises of 14 days or longer have become less popular in the Swiss cruise market, but shorter cruises increased.

Table 13: Swiss cruise market most visited destination regions

	2018 (market share / in 1,000 passengers)	2017 (market share / in 1,000 passengers)	2016 (market share / in 1,000 passengers)
Caribbean, Bahamas, Bermuda	10.3 / 16	11.7 / 18	10.6 / 15
Africa and Middle East	4.9 / 8	3.7 / 6	5.0 / 7
Eastern Mediterranean	14.3 / 22	13.8 / 21	16.4 / 24
Asia, China	2.2 / 3	2.2 / 3	2.2 / 3
Panama Canal, South America	1.8 / 3	2.0 / 3	2.0 / 3
Exploration destinations	2.0 / 3	2.1 / 3	

Source: [CLIA 2018 Europe Market Report](#)

If you run a business in the Eastern Mediterranean regions, in the Asia-China region, or in the Galápagos Islands, you have the biggest opportunities to seize in the European cruise market; these destinations combine a significant number of passengers with the biggest growth in passenger volume (table 1). If we consider the strong growth of transatlantic and world cruises (8% in 2017

and 17% in 2018), businesses in the latter two destination regions might have even more opportunities.

Tips:

- Focus on the UK, Ireland or Germany. The UK and Ireland combined, and Germany, are the most interesting markets for you to focus in Europe.
- Consider products and services in the market of expedition cruises and river cruises because they have strong potential.

4 . What trends offer opportunities or pose threats in the European cruise tourism market?

Growing demand for sustainable cruises

Sustainability and sustainable tourism are big topics in the political agenda in Europe. Travellers, especially the younger generations, and businesses are increasingly aware of and concerned about sustainability. Holiday choices are also increasingly influenced by ethics, moral values, concerns about the environment, animal welfare, production and labour practices, and social impact on local communities and people. These travellers demand affordability and availability of environmentally friendly, sustainable and socially responsible tourism services and products. They want to reduce their holiday carbon footprint, but often want to improve the destination as well. That is why do good, feel good holidays and ecological tours are growing in popularity.

Cruise tourism in general [is seen as unsustainable](#). When huge ships pay visits to small communities, this normally has a big impact on the lives of locals. Because they bring many visitors, who stay only a short amount of time, it may cause over tourism and not create many jobs. Cruise tourism also hardly contributes to local communities, as only 8% of the total holiday expenditure is spent on location. The biggest problem with cruise tourism however is that it generates a lot of pollution, particularly large cruise ships. This includes air pollution (by CO₂ and NO_x emissions) as well as water pollution, since ships create a lot of waste that is partly dumped in waterways, seas and oceans.

The cruise industry is slowly responding to the growing demand for sustainability by working together with destinations, local cultures and landmarks to limit their environmental footprint. There has been an increase of sustainable practices on board, such as waste management, and sustainable tourism activities on shore, such as voluntourism initiatives that focus on creating a positive environmental and social impact at destinations.

Examples of good practices by cruise tourism operators include:

- [AmaWaterways](#) offers river cruises with the [Zambezi Queen](#) in South Africa on the Chobe River. It uses various approaches to sustainability, such as purified river water for on-board showers, taps and the pool; biodegradable cleaning products; solar-heated hot water; and a water-jet propeller system that doesn't disrupt the riverbed.
- [Uniworld Cruises](#) (Ireland): environmentally friendly river cruising.
- [Aqua Expeditions](#): river cruises ships' doctors deliver medical supplies and healthcare to remote Amazon villages.

Tips:

- Study the [UN Sustainable Development Goals](#) and develop a policy on increasing sustainability. Start small, for example, by reducing waste using reusable dishes. Have

clear rules on your ship for passengers, for example, about not throwing rubbish in overboard. Invest in a motor that produces less emissions.

- Large ships can also use technology to reduce wastewater, install solar panels or use alternative fuels like biodegradable fuels.
- Use your sustainability practices to market your product. Showing you care about the environment will prove popular among European tourists.
- Review [our study on trends in the tourism sector](#), where you can find more information on the rising demand for sustainable holidays, including background information, best practices and tips.

Growing European market for millennials

The millennial market for tourism is growing. This generation looks for personalised and transformational travel experiences. Especially river and small ship cruises are gaining in importance among millennials.

The tourism market for millennials or Generation Y travellers, born between 1980 and 1995, is growing rapidly. This generation prefers high-end travel experiences over possessions, while they are tech savvy and technologically driven. Millennials increasingly search for extreme adventures and transformational experiences that contribute to their quality of life. Especially when it comes to destination experiences, cruise tourists increasingly search for acquiring authentic experiences in the destination and the cruise industry responds to this growing demand by establishing connections with the destination and prioritising physical visits and experiences in the destination.

Cruising originally targeted high-spending tourists, but nowadays it is increasingly accessible to people on small budgets, including millennials. Packages now focus on ever-expanding itineraries, destination experiences and options for obtaining Instagram-perfect moments, clearly targeting millennials.

Examples of companies that have successfully tapped into the millennial cruise market include:

- [Aqua Expeditions](#) offers small-boat luxury river cruises in Peru, Cambodia and Vietnam. It has achieved global recognition as a leader in luxury small-ship river cruising.
- [Merapi](#) offers various adventurous budget cruises in Indonesia on small boats. Cruise ships take travellers to snorkelling locations, traditional villages and places to relax, including excursions.
- [Taonga Safaris](#) offers river cruises for tourists aiming to enjoy wildlife.
- [Uniworld River Cruises](#) in collaboration with [ME to WE](#), offers a 12-day New Delhi-to-Kolkata journey that starts with four days of cultural immersion and service projects in rural Rajasthan, followed by eight days on the Ganges, sailing round-trip from Kolkata.
- The South Pacific experts from [Paul Gauguin Cruises](#) have partnered with [Te Mana O Te Moana](#), a non-profit education and conservation organisation, to offer free Moana Explorer programme for kids to participate in daily naturalist-led activities and outings, from conducting water experiments to learning about underwater life through board games. Parents are also welcome to participate. Read more on multi-generational travel on our CBI study on this topic.

Tips:

- Read the [CBI tourism trends report](#) for more detailed information on the needs and wants of Generation Y.
- Investigate the ocean cruises that pass along the coast and the river cruises in your country. Get in touch with the organisations behind these cruises and discuss options to

offer authentic, adventurous and immersive activities.

- Initiate expedition or river cruises with small boats or try to be put on the itinerary of existing ocean or river cruises.
- Provide challenging activities to cruise travellers in a specific destination, such as a traditional canoe journey during a cruise stopover in Papua New Guinea.
- Contribute with connections to the hinterland by providing authentic on-shore transport facilities to bring people from the port to landmarks and activity places.

This study has been carried out on behalf of CBI by [Molgo](#) and [ETFI](#).

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