

# Entering the European market for cruise travel products

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The interest in cruising on both oceans and rivers is growing among European travellers, especially those from Germany and the UK & Ireland, the two largest markets. However, there is an increasing need for the cruise industry to become more sustainable in the face of criticism over polluting the seas and overtourism in major city destinations. Local operators in the industry must implement sustainable best practices within their business if they are to succeed in attracting the European market.

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## 1. What requirements must cruise tourism travel products comply with to be allowed on the European market?

The global cruise industry is heavily regulated, and safety is the most important issue for the major operators across the ocean and river cruise segments. To enter the European market for ocean and river cruises, local operators must consider safety and sustainability to be the most important factors for their business. The cruise industry is growing and, as a result, there are numerous opportunities for local operators to provide shore excursions to ships, shore excursion agents or directly to passengers.

### COVID-19 and the Cruise Industry

The cruise industry has been badly affected by the COVID-19 pandemic. It was one of the first sectors to be severely impacted, and there was much negative publicity as many thousands of passengers and crew were stranded on infected ships around the world. Consequently, the industry has suffered from considerable reputational damage, and there is much work to be done to rebuild trust among consumers.

The European Centre for Disease Prevention and Control (ECDC) has issued comprehensive [guidance on the safe and gradual resumption of cruises in the European Union in relation to the COVID-19 pandemic](#) (issued 27 July 2020), which will give you useful information pertaining to what is acceptable to the European market. CLIA's [Cruise Industry COVID-19 Facts and Resources](#) is another important resource for you to study and was updated in mid-August 2020.

The Adventure Travel Trade Association (ATTA) has developed a range of insights and frameworks to support the resumption of tourism for a range of tourism niches including small ship cruises. You can download the report, [Small Vessels Cruising Amid COVID-19 – Recommendations](#) for clear and helpful information. It is designed to be used alongside [Adventure Travel – COVID-19 Health and Safety Guidelines](#).

The industry itself has taken a robust and proactive approach to recovery in terms of maintaining health and safety practices on board. Ships have introduced a wide range of strict new protocols to help regain consumer confidence. Some of these measures (not all implemented by every cruise line) include:

- Arriving at cruise terminals at appointed time slots
- Screening passengers before boarding via temperature checks, COVID-19 swab tests, medical reviews and health questionnaires
- Equipping vessels with laboratories and expanded medical teams
- Regularly testing crew members
- Implementing contactless options for onboard use, such as for opening doors without touching handles and making payments
- Reducing capacity on ships, some taking 40% fewer guests
- Limiting participants in sporting/entertainment events on board
- Limiting and/or temporarily discontinuing city stops
- Other measures are under review, such as modifying/eliminating buffets and addressing issues raised by the possibility of spreading the virus on shore excursions

In addition, cruise lines are expected to work closely with public health authorities worldwide and CLIA to enforce strict health requirements.

A few cruise lines attempted to launch sailings in the late 2020 season with mixed success. Hurtigruten suffered a major outbreak of COVID-19 on one of its ships in August 2020 and has cancelled all further sailings until 2021. Other major cruise lines appear to be following suit including Crystal and Princess Cruises. In the UK, the British Government continues to advise British nationals not to take international trips on sea/ocean cruises. Germany and other European nations have issued similar advice. However, in the UK this advice was further updated and clarified in mid-July to enable British nationals to take domestic river cruises on account of shorter itineraries and fewer passengers. Similarly, in the European Union (EU), nationals have been cleared to take domestic river cruises assuming specific hygiene measures are in place. This article, [When will cruise ships start sailing again](#), profiles a wide range of cruise lines and their sailing plans for 2020 and 2021.

Nevertheless, research has shown that cruise travellers are a loyal customer base and are optimistic about taking a cruise again. [Bookings for 2021 are reported to be higher than those in 2019](#).

To succeed in the cruise industry following the pandemic, you must carefully consider what measures you should take to encourage cruise travellers back to your business.

For the remainder of this report, all discussion, insight and advice has been provided on the basis of travel in normal circumstances.

## **What are the mandatory requirements?**

The cruise industry is a heavily regulated industry and there are clearly defined standards. Safety is the industry's top priority and cruise ships are subject to a comprehensive system of regulation, enforcement and inspection, which protects passengers, crew and the environment. Vessels are subject to several announced and unannounced safety inspections every year and there are thousands of specific requirements that have been established by the [International Maritime Organisation \(IMO\)](#) and other organisations. Many ships go substantially above and beyond what is required by international law.

Cruise ships are subject to three layers of inspection and enforcement of international law:

- Port States – enforce compliance with international and domestic laws and regulations and detain ships in the incidence of serious violations.
- Countries of Registration – ensure that ships meet all international and domestic requirements and inspect ships on a regular basis.

- Classification Societies – independent bodies that conduct inspections on behalf of Flag States (countries of registration), cruise ship owners, insurers and other members of the maritime community to ensure that ships comply with applicable standards.

### Tips:

- Contact your Port Authority for compliance details that relate to cruise ship regulations in your country.
- Familiarise yourself with [CLIA \(Cruise Lines International Association\)](#), the world's largest cruise industry trade association and the leading authority in the global cruise industry. It conducts and publishes numerous research studies, which you may find useful.

The [International Convention for the Safety of Life at Sea \(SOLAS\)](#) is an international maritime treaty first implemented in 1912 after the Titanic disaster, which sets minimum safety standards for all merchant vessels, including passenger ships carrying more than 12 passengers on international voyages. While the regulations do not generally apply to domestic passenger ships, such as pleasure cruisers or passenger ferries, many countries base their regulations on the IMO standards. Ensuring safety at sea involves the following:

- Trained crew – proper training in safety procedures, security and first aid in everyday and emergency situations. Safety drills in multiple languages prior to departure.
- Lifeboats and rafts – with a capacity that exceeds the total number of crew and passengers by around 25%, plus the equivalent number of lifejackets.
- Fire – safety training and drills, smoke detectors and fire extinguishers, sprinklers and fire hoses.
- Electronic navigational systems - that conform with modern standards.

Many revisions of the Treaty have been adopted over the years in response to major incidents, and as a result of a pro-active approach by the industry to keep regulations up to date.

### Tips:

- Make sure you keep up to date with current safety regulations in the cruise industry, so you can adapt your business as necessary. [CLIA's Safety at Sea](#) is a good place to start – you can be sure that CLIA will always feature and publish the most up to date information on its website.
- You can find out more about maritime safety from the [IMO](#).

## What additional requirements do buyers often have?

### Sustainability

Economic, environmental and cultural sustainability is very important to the future of the cruise industry. In the past, the industry has suffered from a negative reputation over issues such as pollution, plastic waste and overtourism. Today, the cruise industry is investing heavily in environmental stewardship to increase its appeal to a new generation of cruisers demanding more sustainable travel options.

Sustainability and environmental stewardship in the cruise industry covers several areas:

- Air – shipping fuel that is high in sulphur is a major environmental concern, and a 2020 IMO regulation requires ships to use low-sulphur fuel alternatives that are less harmful to the environment. In 2020, CLIA

reasserted its pledge to reduce the rate of carbon emissions across its industry fleet by 40% by 2030. The industry is also exploring other fuel alternatives, such as liquefied natural gas (LNG) and fuel cells. Hurtigruten launched [the world's first hybrid electric-powered expedition ships](#), MS Roald Amundsen in 2019 and sister ship MS Fridtjof Nansen in 2020, which use large banks of batteries to supplement engines that use low sulfur marine gas oil. A third, similarly powered Hurtigruten vessels is under construction, due to launch in 2021. French operator [Ponant's new hybrid electric-powered icebreaker](#), Le Commandant Charcot, powered by batteries and LNG, is also due to enter service in 2021, when it makes its inaugural trip to the Arctic.

- Energy – the use of energy-efficient engines and hull coatings to reduce friction and fuel consumption are cutting-edge developments in the industry. Other energy-saving initiatives include the use of LED lights and more efficient appliances, recycling hot water in cabins and reusing water within engine cooling and air conditioning systems.
- Waste management – following waste management and recycling practices to prevent waste in oceans. Some cruise ships now repurpose all their waste on board by reducing, reusing, donating, recycling and converting waste into energy.
- Ensuring ocean health and supporting local economies – committing to best practices and having a positive impact on the communities and destinations visited.

The infographic below outlines the environmental technologies and practices that CLIA cruise ships adhere to.

Chart 1: CLIA Sustainability Facts

Source: CLIA

### Tips:

- Read more about CLIA's commitment to protecting and preserving the environment in its [Sustaining the Seas we Sail](#) study.
- Establish your own sustainability charter for your business. Read what initiatives the [Motor Yacht Tucano](#) has adopted to establish sustainable river cruise travel on the Amazon River in Brazil.

## Infrastructure

Built infrastructure is a key requirement for cruise tourism, either on the sea/ocean, river or lake. This involves a cruise terminal or other docking facility. Docks need to be of sufficient length and the water of sufficient depth to accommodate the size of incoming vessels. If larger ships are unable to land, ships will dock offshore and tenders are used to transport passengers to shore. Tenders are more typical in more remote destinations or on islands where cruise infrastructure is more limited.

### Tips:

- Assess what the current port infrastructure is for cruises at your destination.
- Make sure you know what size ship the port or ports can easily handle, or whether cruise ships dock offshore and tenders are used to bring passengers to shore. Find out more about the difference between docks and tenders in Cruise Critic's, [Docks vs Tenders: Two Ways to Get Ashore](#).
- Contact your local Port Authority for more advice on what facilities there are for cruises in your destination.

## What are the requirements for niche markets?

When developing a cruise business, it is useful to know what factors about a destination are important to your potential cruise passenger. Research on the decision criteria for cruise passengers in the North Sea Region in northern Europe provides some useful information that can be applied across the cruise industry. While safety and security emerge as an essential factor, the attractiveness of the destination, its reputation and availability and quality of tourist activities will all have an impact on whether cruise passengers will join your cruise.

Chart 2: Destination Criteria that Attract Cruise Passengers

Source: EU; Cruise Gateway North Sea; The Interreg IVB North Sea Region Programme

### Tips:

- Study each criterion carefully to assess whether your destination would be suitable for a cruise business.
- Consider whether there are services you could offer to cruise companies that use your local port.

## Planning and marketing your cruise

It is important that you take the time to plan itineraries and/or routes. Most major cruise lines plan their routes at least 18 months/2 years in advance, as there are many considerations to take into account. You should make sure to consider the following:

- Ensuring the safety of the vessel – This is the number one priority for the cruise industry, and you can never make a vessel ‘too safe’. It is essential that all boats conform with the applicable safety laws in your destination and have a supply of lifejackets that exceeds the number of passengers and crew on board. To begin with, make sure you know what the local regulations are by contacting your local Port Authority.
- Plan the route – incorporate stops that are enticing for passengers. When they disembark, be clear about what they can do and how long the stop is for.
- Provide guides – if your cruise is guided, make sure the guide you provide is qualified in the relevant field, is professional and can speak the language well.
- Accessibility to the dock/port – it must be easy/convenient for your passengers to reach your cruise. Check that signage in the area is clear. If it could be improved, consult the relevant authorities to see if there are plans in place to improve the signage, or press for improvements to be implemented.
- Length of cruise – be clear about the duration of the cruise, whether it is a few hours, a day trip, or longer with overnight stays.
- Onboard facilities – the vessel should have adequate seating and/or accommodation with clean bathroom facilities. If you will be serving meals on board, there should be adequate and clean kitchen and serving facilities.
- Staff – make sure you have enough crew to service the cruise. They must be fully trained in all safety procedures.
- Maximising onboard revenue – make sure you can generate additional revenue from your passengers through the sale of additional merchandise. This could be food and drink, memorabilia, clothing or equipment.
- Be competitive – consider adding value by offering additional services such as free kayaks or snorkelling equipment that could help you stand out from other cruises in the area.
- Marketing – ensure that all the information you publish about your trips is clear and transparent and includes full safety details.

### Tips:

- Make sure your website provides comprehensive details about your cruises and/or boat trips to ensure that potential customers have all the details they need to make a booking.
- Ensure that the details about your trips on your website are the same as any listings you have with OTAs.
- Read the [CBI's Tips for Organising your tourism services export to Europe](#) for information about promoting your business online and driving bookings with OTAs.

## Selling shore excursions to your passengers

You may want to consider selling shore excursions to your passengers as they represent a major source of income for cruise lines and land-based tour operators. They are usually sold to the passenger by the cruise line, or passengers can purchase an excursion from the tour operator either directly or via an agent.

To sell a shore excursion to your passenger, you must develop compelling itineraries. These are the steps you should take when selecting suitable suppliers:

- Safety – knowing that safety is the most important element to the cruise line, your suppliers must have comprehensive excursion insurance that covers the participants in all eventualities. Find out more about [Excursion Insurance](#) here.
- The nature of the excursion – your trips must offer something that passengers on board will be interested in. You could offer a city tour if the cruise is a cultural tour, or a visit to an animal sanctuary if your cruises have a family audience. If the cruise is an expedition vessel, perhaps you could consider an adventure activity, like a cycling tour.
- It must be good value – ensure that your passenger prices are attractive to passengers. Make sure you are transparent about the prices and that there are no hidden extras. Again, you can find out more about setting prices in the [CBI's Tips for Doing Business with European tourism buyers](#).
- Time and convenience – your suppliers must be able to deliver the excursion within the ship's timetable and commit to returning passengers on time. The OTA Tours by Locals includes a '[No One Left Behind](#)' shore excursion guarantee for its customers and will arrange transportation to return passengers to the ship if the return time is missed for any reason.
- Trained/qualified staff – you must be confident that the excursion you are providing will be delivered by qualified professionals.

### Tip:

- To find out more about obtaining relevant liability insurance, read the [CBI's Requirements that tourism services should comply with for the European Tourism market](#).

## 2. Through what channels can you get cruise tourism travel products on the European market?

### How is the end-market segmented?

Before the pandemic, the cruise market was witnessing strong growth in the key source markets of Germany, the UK and Ireland, Italy, Spain and France. Global growth in 2020 was expected to reach 32 million passengers, up from 30 million in 2019, according to CLIA. You can read more about the size of the cruise market in Europe

in the European market potential for Cruise Tourism Study.

The market can be broadly segmented into five major categories as indicated in the table below. The segments of most interest to local cruise operators in developing countries are those in the Excursion and Day Trip Market, and the Budget Segment.

Local tour operators offering shore excursions may be interested in all the segments, depending upon the nature of the excursion they are offering.

Table 1: Cruise Tourism Segments

Segment	Demographics	Typical Itinerary Durations	Ship Characteristics	Representative Ships/Cruise Lines
Excursion and Day Trip Market	FITs, couples and singles, families	Part-day/day trip; 1-5 days	Local cruise vessels, vary in size, range from budget, mid-range to luxury	Motor Yacht Turcano, Brazil Panama Canal Tour Boats Traditional Dahabiyas, Egypt
Budget	Youth and lower-income population segments	3-7 days	Small ships with minimum on-board facilities and services	TUI - Marella Cruises Local cruise lines
Contemporary	Broad target market - first-time cruisers, families, couples, young people	3-7 days	Large ships, resort-type facilities, emphasis on-board activities (shops, family entertainment, beauty, spa, etc)	Carnival Cruises Celebrity Cruises Costa Norwegian Cruise Line P&O Royal Caribbean
Premium	40+, often professionals, repeat passengers	Varied; emphasis on cruises longer than 7 nights	Smaller than Contemporary segment; refined furnishings	Fred Olsen Holland America Line Oceania Cruises

Luxury	Couples and singles with a taste for luxury resorts	More than 10 days	Smaller ships, spacious accommodation, quality interior design, exclusive atmosphere. High crew-to-passenger ratio	Crystal Cruises Hapag-Lloyd Kruezfahrten Peter Deilmann Kreuzfahrten Seabourn Silversea
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Source: UNWTO; Acorn Tourism Consulting (Note: FIT = Fully Independent Traveller)

## Through what channels do cruise travel products end up on the end-market?

The market for selling cruises is vast, and there are numerous ways to select and book a cruise. The main routes to sell products to cruise customers are shown in the chart below.

Chart 3: Route to market for Cruises and Shore Excursions

Source: Acorn Tourism Consulting

### Direct from individual cruise lines

This method is usually used by cruisers who know exactly what they want and which cruise line they want to travel with. Customers who book directly with the cruise line are more likely to be repeat customers. The major cruise lines include [Carnival](#) and [Royal Caribbean](#), two of the world's largest cruise lines; [Silversea](#) and [Seabourn](#), specialising in luxury cruises; and [CroisiEurope](#) and [Viking River Cruises](#), specialising in river cruises.

### Travel agents

They are a crucial sales channel for the cruise industry and there are numerous agencies. It is a highly competitive market and most have a strong online presence. Some travel agents also have high street shops. For potential customers, the benefit of using a traditional travel agent is that they can offer specialised advice and are able to negotiate deals and promotions that customers may not know about.

There are two groups of travel agent:

- General travel agents – that sell cruises alongside other travel products. Leading German travel company TUI has a strong presence throughout Europe, and its cruise division is branded [Mein Schiff](#) in Germany, [Marella Cruises](#) in the UK, and [TUI](#) in the Netherlands. [Kuoni](#) is another leading European travel company, part of the German DER Touristik Group.
- Specialist cruise agents – these agents focus only on selling cruise holidays and can provide support by phone to help cruise passengers find the right cruise for their needs. Examples include [Kreuzfahrten](#), [E-hoi](#) and [Astoria Kreuzfahrten Zentrale](#) in Germany, and in the UK, [Cruise Direct](#), [Iglu Cruise](#), [Cruise 1st](#) and [Planet Cruise](#).

### Aggregator Websites

Provide comprehensive searches across all cruise lines, using filters that can include dates, length of trip, destination, port of departure and more. [Expedia](#), [Priceline](#), and [Tripadvisor](#) are examples of aggregator websites, and each has a cruise tab on its website.

### Specialist OTAs and local travel agencies

For less formal cruise products in developing countries, such as boat trips or short river cruises, local travel

agents or specialist online travel agents (OTAs) such as [Viator](#) offer FITs (fully independent travellers) and land-based tourists the opportunities to book trips once at their destination.

## Shore Excursions Agents

A further business opportunity for suppliers of excursions to the cruise industry are agents that sell shore excursions directly to cruise passengers. An example is [Shore Excursion](#) (a subsidiary of specialist cruise agent, Cruise Compete) and [Cruising Excursions. Tours By Locals](#) also offers shore excursions to cruise ship passengers and [Inter cruises Shoreside & Port Services](#) is a global organisation working with cruise ships in more than 50 countries. In Europe, specialist German operators include [Kreuzfahrtausflüge](#) and [Seereiseplanung Kreuzfahrten](#).

## What is the most interesting channel for you?

If you are operating boat trips or local cruises, specialist OTAs and local travel agencies are the best channels for you to work with.

If you want to supply shore excursions to passengers on cruises, you should consider two channels:

- Contact the relevant Shore Excursion Directors for each cruise line you wish to sell to, to discuss their needs and find out if you would be a suitable supplier.
- You could also consider submitting your excursion to one or more of the shore excursion agencies as listed above, if they serve the cruise lines you wish to target.

## 3. What competition will you face on the European cruise tourism market?

### Which countries are you competing with?

As the world is predominantly covered in water (71%), there are numerous destinations around the world that offer cruises and boat trips for the purposes of leisure tourism, as well as the traditional cruise arrivals on the major cruise lines. Analysing the busiest cruise ports in developing countries is a useful starting point to identify competing destinations for local cruises and boat trips. The busiest cruise ports in 2019 in developing countries are listed as:

- Cozumel, Mexico
- Shanghai, China
- Ports of Jamaica
- San Juan, Puerto Rico
- Roatan, Honduras

River tourism is growing in popularity. Ships tend to be smaller and shore excursions are more numerous, leading to a more intimate cruise experience. This offers local operators good opportunities to enter the market competitively. You should consider the major competing destinations for river cruises in developing countries to be:

- Brazil
- Egypt
- India
- Panama
- Thailand
- Vietnam

Other, secondary competitors that also have strong river tourism opportunities include Botswana (Okavango Delta), Cambodia (Mekong River), China (Yangtze and Li Rivers), Laos (Mekong River), Malaysia (Rejang River),

and Myanmar (Irrawaddy River).

## **Brazil**

The Amazon River is one of Brazil's major tourist attractions, and there are multiple cruise ships that operate on the world's longest river on sailing itineraries lasting three days to two weeks. Manaus is the most common starting point for river cruises. In the interior, the tropical wetland area of the Pantanal is renowned for its wildlife and the best way of viewing it is by boat. Brazil is becoming more accessible for Europeans. Airline Norwegian launched the first low-cost flights from the UK to Brazil in March 2019 although for now (September 2020) Norwegian is only flying to European destinations. Most European countries, including the UK, Germany, the Netherlands, France and Spain can now travel to Brazil without a tourist visa, which helps to make it an attractive, accessible destination for Europeans looking for a long-haul destination.

## **Egypt**

Tourism to Egypt is recovering following years of security fears. The ancient sites and monuments situated on the shores of the River Nile are the country's key tourism attractions, and cruising down the river is a popular way to reach them. Cruising on the Nile can be broadly divided into two types: large, standard cruise vessels known as 'floating hotels', and smaller, traditional sailing boats with cabins, known as dahabiyas. Day/part-day boat trips are usually on feluccas that have no cabins; sometimes passengers stay overnight on feluccas and sleep in the open air on deck. OTAs including [GetYourGuide](#) and [Viator](#) both feature day trips/part-day trips on feluccas.

## **India**

River cruising in India has been increasing in popularity over the past five years and the most popular rivers are the Brahmaputra River in Assam and the River Ganges in the north. In south India, Keralan backwaters are among the state's biggest tourist attractions. A journey on a Kerala houseboat has a reputation for being one of the world's top ten journeys. The river cruise sector is estimated to account for 9,000 tourists annually, and an increasing number of local cruise ships are applying for permits.

## **Panama**

A cruise or boat trip on the Panama Canal is a popular option for visitors to Panama. There are numerous trips offering partial or full transits of the Canal, travelling from either the Atlantic or Pacific coasts. On a partial transit, boats sail into the Gatun Lake, and some drop anchor and tender passengers ashore for boat tours of the lake. The San Blas islands in the Caribbean Sea are popular destinations for island hopping cruises. The Islands are an indigenous protected zone.

## **Thailand**

In the north, the Mekong River meanders through one of the most biologically diverse environments in the world, and cruising the river is the best way to view the wildlife and flora. Cruises on the river often continue north into Laos or south into Cambodia. Cruises of varying lengths are the mainstays of river cruise tourism in Thailand, and it is easy to book them directly or via OTAs. The numerous islands and beaches of southern Thailand are popular with international visitors and day/part-day cruises and island hopping are popular activities.

## **Vietnam**

Tourism is booming in Vietnam, and it is a leading emerging destination among developing nations. In the south, the major waterways of the vast Mekong Delta provide major tourism opportunities for local operators and boat trips and cruises on the river are numerous. Cruising is also the most popular activity in the north in Halong Bay, and there is a wide variety of different types of cruises ranging from luxury to budget, and with different durations.

### Tip:

- Study the different rivers cruises that are offered in each country to judge how they compare with what is on offer in your destination.

## Which companies are you competing with?

Europe is one of the worst-hit areas by the COVID-19 pandemic, and although Europeans are keen to travel again, they will need strong and encouraging reassurance. To stay ahead of the competition, you must inform them of measures you are taking to keep them safe when they use your services. To do this, it is essential that you include a prominent link and/or message on the Homepage of your website, and you should list all the measures you are taking to keep them safe.

European tour operators already feature very detailed information about how they will keep their customers safe, and you should research how they are communicating with their customers. For instance, [Intrepid Travel](#) (UK) provides a link on its homepage and uses the message, 'Your safety remains our priority'. [Globetrotter Abenteuer](#) (Germany) immediately draws your eye to the 'Current Situation'. [TUI](#) (Global) uses the website's top navigation to promote its 'Travel with Confidence Hub', which provides all the information customers need to make their holiday decisions. OTAs are also very strong on their messages to keep customers safe. [Viator](#) provides a direct link to detail safety procedures under its Homepage message, As the world reopens.

## Brazil

[Amazon Tours Brazil](#) has offered boat trips and cruises on the Amazon for 34 years, going to places that other tour operators do not go. It offers several options for river travel such as hotel boats with cabins, traditional riverboats and sheltered speedboats. Its tours are aimed at a wide audience including families, nature lovers, and couples, and options include luxury and budget, so there is much to appeal to a broad demographic. The operator has international recognition from Tripadvisor, Lonely Planet, Footprint and Fodors.

[Amazon Eco Travel](#) specialises in Amazon jungle tours, river cruises, fishing trips and expeditions that are sustainable, with the social inclusion of the local and indigenous population. The operator uses regional riverboats, and its tours typically offer extras such as canoeing in creeks, jungle hikes, swimming with pink river dolphins and visiting local families.

[Gasparetour Pantanal Tours](#) is a sustainable tour operator based in Cuiaba, which offers tours in the northern Pantanal Wetlands. Focusing on viewing the wildlife, its packages and tours cover a range of activities including boat tours, and it is ranked the #1 operator in the region on TripAdvisor. Its guides speak multiple languages and there is a clear focus on providing an outstanding service to its clients. It clearly features testimonials on its website. The operator has recently published trips for autumn 2020 and onwards on its website.

## Egypt

Leading travel publications Rough Guide and Lonely Planet recommend Nile cruises on traditional dahabiyas offered by [Djed Egypt Travel](#). They are operated in both directions between Esna and Aswan and rely solely on wind power. Visits to ancient sites en route are accompanied by experienced Egyptologists. The operator provides a direct link to its TripAdvisor page from its website.

[Egypt Felucca Ride on the Nile](#) offers private, short felucca trips from Cairo, Luxor and Aswan. All trips are accompanied by Egyptologists, transfers to/from accommodation are included along with lunch and entrance fees. Trips are tailor-made and operated at times to suit clients.

## India

[Karma Kerala](#) offers a range of cruises of between one and three nights on houseboats that are luxury, superior or standard, and with varying numbers of beds. Boats are rated according to age, design, hygiene, crew and general 'ambience', and boats are matched to client needs. The operator offers a 'price match' guarantee, where they will match another's price as long as it is directly comparable.

The cruise vessel [Alfresco Grand](#) operates a wide range of river cruises on the Brahmaputra River including day/part-day cruises at sunset, lunch, dinner or day-long charters, along with overnight cruises. It has two ISO certifications, ISO9001:2008 (quality management systems) and ISO22000:2005 (food safety systems) although please note that these have both been superseded by revised standards [ISO9001:2015](#) and [ISO22000:2018](#). Alfresco Grand is a subsidiary of Brahmaputra Cruise Pvt and its cruises are also listed by Tripadvisor.

## Panama

[Panama San Blas Tours](#) offers day cruises around the islands, island hopping and overnight trips. Vessels are catamarans or monohulls. Trips by plane or helicopter are also provided. The organisation actively supports the local community through employment opportunities. Tours are recommended by Get Your Guide (top rated), Expedia (five star) and Tripadvisor (2019 Certificate of Excellence). To help support local families derive income during the pandemic, sales of locally made masks are enabled through the website, shipped internationally.

[Panama Canal Tours](#) offers both full and partial transit trips through the Panama Canal on tour boats with capacities of between 120 and 500 people. It regularly achieves a Certificate of Excellence from Tripadvisor and promotes itself as a Green Company. The organisation has partnered with a Costa Rican operator to create combination packages in both countries that includes the canal transit. The operator has published its 2021 season of cruises online.

Panama-based [Tao Travel 365](#) is an online marketplace aiming to provide travellers with a one-stop-shop, offering tours, itineraries and advice, 24 hours a day, 7 days a week. Sailing adventures and cruises in Panama are among its itineraries, and it also sells its tours on Viator. The operator has committed to a range of safety precautions to keep customers and staff safe during COVID-19, as evidenced in the chart below:

Chart 4: Tao Travel 365's COVID Safety Precautions



Source: Tao Travel 365/Viator

## Thailand

[Cruise Asia](#) owns and operates the RV River Kwai cruise vessel, the first inland cruise ship in Thailand. Two cruise packages are promoted, a seven-day cruise and a four-day cruise on the River Kwai, which begin at the town of Kanchanaburi. Prices for cruises in late 2020 and into 2021 have been published, and the map feature showing the cruising area and sites to visit along the way are useful tools for potential customers.

Based in Bangkok, [Manohra Cruises](#) offers dining cruises, charter cruises and other special events cruises on its fleet of restored antique rice barges built in the traditional 'krachaeng' style, meaning boat with canopy, once the main way of navigating the river. All cruises are operated on the Chao Phraya River and cruising experiences include private dinner cruises, sightseeing around some of Bangkok's most famous cultural sites and evening cruises.

## Vietnam

[MekongBoat.com](#) is an established Vietnamese tour company offering river cruises in the five countries of

Vietnam, Cambodia, Thailand, Laos, and Myanmar. As well as promoting cruises, its website also shares information and advice about cruising on the Mekong, publishes reviews and supports passengers while planning their cruise. It can book cruises on international cruise lines as well as local, cheaper cruises and day cruises. The website is available in English, French and Spanish.

[Cat Ba Ventures](#) is a locally owned and operated tour company on Cat Ba Island offering trips in sailing boats and junks (Chinese sailing ship) around Lan Ha Bay and Halong Bay. In addition, the operator has diversified to offer a range of land-based tours and facilitates mountain climbing experiences. Recommendations from TripAdvisor, Lonely Planet and Rough Guides feature prominently on the website. As a specialist operator in the Halong Bay area, it has published a Green Travel Guide that encourages visitors to treat the World Heritage Site with respect, outlining a range of tips to help.

### Tips:

- Study the activities of these local operators to see what you might learn. Examine how they operate and price their trips.
- Closely analyse how they have constructed their websites to see if there are any tips you can adopt for your own website, such as promoting TripAdvisor and testimonials more prominently.

## What products are you competing with?

The main competing products for local cruise and/or boat trips are land-based day trips and short trips aimed at the adventure market. In many developing countries, there is a considerable range of trips for FITs (fully independent travellers) both water-based and land-based. This means that you will have to work hard to create a Unique Selling Point (USP) to differentiate your travel product from others on the market. To find out more about creating a USP, you can read [CBI's Tips for Doing Business with European Tourism Buyers](#).

### Tips:

- Conduct a SWOT analysis to identify the strengths, weaknesses, opportunities and threats for your business. A SWOT analysis is a useful business tool to help you take the right steps to develop your business by understanding how to exploit your strengths and improve in areas that are weaker.
- Research what other boat trip operators and providers are doing in your area to gain an understanding of what your competitors are doing. This research will ensure that you have a thorough understanding of the market in your area.
- To find out more about the adventure market, consult the [CBI's Entering the European Market for Adventure Tourism](#).

## 4. What are the prices for cruise tourism travel products on the European market?

When pricing your cruise product, the main consideration for local operators is to decide what is included in the price. Prices of river cruises are most typically 'all-inclusive'. This means that once passengers have paid the agreed fare, there will be nothing else to pay. All meals, drinks and excursions are likely to be included in the price.

Advice on pricing that is given to passengers offers useful information for local operators:

- Asia River Cruise Prices – cruising on rivers in China, Vietnam, Thailand, Cambodia and Myanmar often

includes land-based components that are longer than the cruise itself. Seasonality plays a big part in pricing Asian cruises, which can differ from as little as €270 per night during the rainy season (June to August) on the Mekong and Yangtze, to €320 during peak travel times. River cruises on the Irrawaddy in Myanmar command prices that are roughly 20% higher.

- Amazon River Cruise Prices – The Amazon River that winds through Peru and Brazil is the most expensive river in the world for cruising. One reason is that it is more difficult to get to than other destinations. A nine- or 10-night cruise with a major operator starts from €448 per night (Avalon) to €635 per night (Lindblad). An Amazon cruise is characterised more by its shore excursions than time spent on board. However, cruises are less seasonal than in Asia, taking place all year round.
- Nile River Cruises – on average, Nile cruises cost €448 per night. The market offers a good mix of itineraries from 3-, 4- and 6-night cruises and some extend to Lake Nasser. Cruising on the Nile is seasonal, on account of the extreme heat in the summer, although they do happen year-round. Pricing variance between high and low seasons can be as much as 25%.

You can read more about how river cruises are priced in this article by Cruise Critic, [River Cruise Prices – A Primer for the First Timer](#).

As the cruise industry recovers over the coming months, it is anticipated that prices will be discounted to entice passengers back on board. Prices for regular ocean cruises in 2021 are showing discounted prices for early bookings, cabin upgrades and/or drinks packages. You should research the current pricing structures adopted by your competition and adapt your charges as appropriate.

Table 2: Sample Prices of River Cruises in Competing Destinations, 2020

Cruise	Country	Duration	Guide price per person (€)
<i>Day/Part-day Cruise</i>			
Felucca Ride on the Nile	Egypt	2 hours	33.70
Amazon River Cruises	Brazil	Day	51.10
Ayutthaya Temples and River Cruise	Thailand	9 hours	54.60
Lan ha Bay and Halong Bay	Vietnam	7 hours	81.00
Kerala Backwaters Houseboat Cruise	India	7 hours	103.40
Full Day in San Blas	Panama	Day	127.80
Partial Transit Canal Tour	Panama	Day	153.40
Full Transit Canal Tour	Panama	Day	213.00
<i>Overnight Cruises</i>			

Halong Bay Overnight Cruise	Vietnam	2 days	128.40
Standard Houseboat in Kerala	India	3 nights	139.00
Chaing Rai to Luang Prabang	Thailand/Laos	4 days	170.40
Deluxe Houseboat in Kerala	India	3 nights	208.50
Amazon Jungle Adventure Tour	Brazil	4 days	344.80
Mekong Delta	Vietnam	6 days	383.40
Sailing Trip to San Blas Islands	Panama	3 days	485.70
Dahabiya Nile Cruise	Egypt	4 nights	760.00
Cruise on River Kwai	Thailand	4 days	1,316.00
Panama Discovery Cruise	Panama	7 days	3,280.00

Source: Acorn Tourism Consulting

Notes: Research conducted online in September 2020 with various tour operators. Guide prices exclude international airfares.

You should consider the following steps:

- When pricing your cruise or shore excursion, be clear about what your trip offers and what it does not. You should include this on your website. Trips on OTA Viator always very clearly display what is included and what is not. See this example for the [Viola Cruise](#) in Halong Bay, Vietnam (see chart below).

Chart 5: What's Included/What's Not – Viola Cruise in Halong Bay



Source: Viator

- Consider adding extras to your trip to make it more appealing to a wider audience.
- If you decide to include entrance fees and sightseeing tickets in your price, make sure you have allowed for these when setting your own prices.
- If seasonality is a factor in your destination, consider a range of prices that takes into account low and high seasons.

### Tip:

- When setting your prices, research what your competitors are selling similar products for. Only set a higher price if you believe you are offering a better service than your competitor. [Read CBI's Organising your Tourism Services Export](#) for more information about setting prices.



This study was carried out on behalf of CBI by [Acorn Tourism Consulting Limited](#).

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