Travel Market Report’s Outlook on River Cruises
Based on the Voice of the Travel Advisor 2019
One-of-a-kind, award-winning ships | The most all-inclusive amenities | Delicious farm-to-table cuisine
Outstanding service | See the world from an ultra-luxurious perspective

ALL-INCLUSIVE LUXURY RIVER CRUISING TO AN ENTIRELY NEW LEVEL.

ELEVATING

We stock our bars with 11 VODKAS AND 28 WHISKEYS AND BOURBONS—most of which are premium and included.

The only ships on the rivers with REAL WATERFALLS, ORIGINAL ARTWORK by Picasso, Monet, Chagall and more, and SAVOIR OF ENGLAND BEDS.

Our crew consists of 100% UNIWORLD EMPLOYEES, with an impressive 93% returning from one season to the next.

To learn more about the “#1 RIVER CRUISE LINE” as voted by readers in the Travel + Leisure 2019 World’s Best Awards, VISIT UNIWORLD.COM OR CALL 1-800-653-4296.
Dear Readers,

If there were any questions about whether or not the bloom was off the rose when it comes to River Cruises, the more than 850 travel advisors who responded to our TMR Outlook on River Cruises survey say otherwise, overwhelmingly.

In fact, you might call it a love affair. River cruise clients are not only highly profitable for advisors, but they are also ideal for groups. Agents also say that, virtually without exception, clients come back happy and become pied pipers generating referrals.

We queried respondents, all readers of Travel Market Report, about whether or not they specialize in river cruises; their sales volume during the past year as well as projections for the next 12 months; how much they influence category and supplier selections; preferences and characteristics of river cruise clients; destination interest; obstacles to selling even more; future customer target; which marketing tools are most effective; what type of B2B support they want; which lines they are selling; and much more.

I want to personally thank all of Travel Market Report’s readers who took the time to share their insights. I know this TMR Outlook on River Cruises will be a valuable resource for the entire travel industry.

Yours truly,

Anne Marie Moebes
Executive Vice President and Publisher
OVER 850 TRAVEL ADVISORS PARTICIPATED IN THE SURVEY, which took an average of 12:27 minutes to complete, and the results have a +/- 3% margin of error with 95% confidence.

94% OF AGENTS SOLD RIVER CRUISES IN PAST 12 MONTHS, and 99% expect to sell river cruises in next 12 months.

SLIGHTLY MORE THAN HALF OF RESPONDENTS (52%) SAID THEY OR SOMEBODY ELSE IN THEIR AGENCY SPECIALIZES IN RIVER CRUISES. As a comparison, significantly less answered “yes” when we asked the same question in our TMR Outlook on Expedition Cruises, where 20% of respondents described themselves as specialists.

Nearly eight in ten (77%) SAID THAT PERSONAL OR AGENCY SALES HAVE INCREASED in the past year, with another 20% saying revenues were flat.

SIXTY-NINE PERCENT (69%) OF RESPONDENTS SAID RIVER CRUISE SALES INCREASED IN THE PAST 12 MONTHS with 21% saying they were flat versus just 4% saying they saw a decrease, showing the category was helpful in boosting sales for advisors.

HALF (50%) OF ALL RESPONDENTS SAID CLIENTS CHOOSE A DESTINATION OVER A NEW VESSEL. Only 8% said, clients “would select a newer vessel over an itinerary.”

EIGHTY-SEVEN PERCENT (87%) OF RESPONDENTS ARE PROJECTING AN INCREASE IN RIVER CRUISE SALES IN THE NEXT YEAR, including 43% who expect sales to go up by more than 10%, and 22% who are expecting gains of more than 25%.

FORTY-TWO PERCENT (42%) SAY CUSTOMERS “GENERALLY AREN’T FAMILIAR WITH THE RIVER CRUISE LINES OR SHIPS, and they come to me for my recommendations.”

TWENTY-FIVE (25%) OF AGENTS told us customers “wouldn’t have considered a river cruise if I hadn’t recommended it to them.”

THE MOST COMMON TRAIT AMONG RIVER CRUISE CUSTOMERS is they are well traveled (81%), said the agents who took our survey. Sixty-four percent (64%) said, “They want inclusive travel that includes meals such as guided tours and cruises,” an equal number (64%) said, “They also travel independently.”

Eighty-four percent (84%) of advisors said clients are “MOST INTERESTED IN THE DESTINATIONS AND ITINERARY OF THE CRUISE.”

SIXTY-TWO PERCENT (62%) SAID CLIENTS OFTEN COMBINE PRE-OR POST-CRUISE LAND VACATIONS WITH A RIVER JOURNEY.

“TOO EXPENSIVE” WAS THE TOP OBSTACLE (55%) agents said prevented them from selling more river cruises.

Boomers (69%) and Luxury Travelers (63%) who have not taken a River Cruise before are “VERY LIKELY” THE BEST NEW PROSPECTS OVER THE NEXT 24 MONTHS, say advisors.

Of over 55 companies that sell river cruises, 40 HAD LESS THAN 50% AWARENESS WITH THIS AUDIENCE of heavy sellers in the segment.

AMAWATERWAYS AND VIKING RIVER CRUISES WERE THE MOST WIDELY SOLD (85%) followed by Avalon Waterways (79%), Uniworld/U by Uniworld (71%), Tauck River Cruises (65%), Crystal River Cruises (64%), American Queen Steamboat Company (58%), American Cruise Lines (57%), Emerald Waterways (52%), Scenic Luxury Cruises (51%), G Adventures (46%), and Abercrombie & Kent (41%).

REFERRALS (69%) ARE BY FAR THE MOST POPULAR WAY AGENTS PROMOTE RIVER CRUISES followed by agency websites (58%), their own email list (54%), their own social media (45%), the agency’s social media (42%), marketing programs from their consortia (38%), direct mail (36%), an email list from their agency (33%), events they host for potential clients (32%), and consortia websites (31%).

Agents say more Fam Trips (82%), followed by content they can share with their clients (61%) are the TWO AREAS THEY WOULD LIKE MORE SUPPORT FROM SUPPLIERS.
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**INTRODUCTION**

*River Cruises are niche no more. In this Travel Market Report Outlook on River Cruises, 94% of the over 850 travel advisors who responded told us they currently sell this way to vacation on the world’s most popular as well as lesser-known waterways.*

What’s more, 99% expect to sell River Cruises in the next 12 months with 87% expecting an increase, including 22% who believe their bookings will increase by more than 25%.

In this Outlook, you will find insight into how advisors influence selection of the category and brands, consumer preferences, profitability, future targets, as well as obstacles to growth. We also give you an in-depth look at which lines they are selling, including the ones where they are focusing their sales efforts, as well as those players that are trying to make it onto their radar.

You’ll also want to read about which marketing tools they find most effective and see what they say when we asked them to speak out about River Cruises.
Between July 24 and Aug. 3, 2019, Travel Market Report surveyed via email its readers about River Cruises. An incentive of two $100 gift certificates was offered.

Of the 887 respondents, 79% said they work in or for travel agencies based in the United States and 19% said they work in agencies based in Canada.

You’ll note on many behavioral questions, we allowed agents to select multiple answers in multiple-choice questions versus just a single choice. This means totals will add up to more than 100%. It also enables respondents to give us a full view of the clients they serve instead of being pigeon-holed into a single answer.

We’ve highlighted any differences between Canadian respondents and the overall sample.

Two percent (2%) who didn’t work in or for travel agencies were exited from the survey. The survey took an average of 12:27 minutes to complete.

Of the agents who took our survey, 51% described their role as agent/advisor while 34% said they were both agency owner and advisor and 12% described themselves as exclusively owner/manager of a travel agency. Three percent (3%) said they held other positions in a travel agency.

For Canadian respondents, 67% said the were advisor/agents exclusively and only 18% said they held a dual role of manager and advisor, both statistically outside the margin or error in terms of differences from the overall sample.

The pool of those surveyed (Travel Market Report readers) is experienced – averaging 12.8 years in the travel industry – and highly productive – personally selling 1 million plus in leisure travel annually.

Results have a 95% confidence level with a +/- 3% margin of error.
I n 2021, award-winning AmaWaterways continues to enhance their unparalleled river cruise experiences in some of Europe’s most sought-after destinations. With one new ship, four unique new itineraries and land extensions, the line offers even more variety for all types of travelers.

New Ship and More River Cruises in France
Sister ship to the award-winning AmaLea, the spectacular AmaLucia will join AmaWaterways’ innovative fleet, sailing their Tulip Time and Rhine & Moselle itineraries. Responding to guests’ and travel advisors’ feedback, as well as the increased demand for sailings in France, AmaWaterways will welcome their award-winning twin-balcony ship AmaKristina and beautiful AmaDante to their French river fleet, offering travelers more opportunities to discover the best of French food, culture and lifestyle.

Enticing New European Itineraries and Land Extensions
Nature enthusiasts will love AmaWaterways’ new 7-night Impressions of the Seine & Paris. They’ll admire gardens such as Monet’s in Giverny, the romantic gardens of Château d’Acquigny, the Italian Renaissance garden of Château d’Ambleville and Château de Harcourt Arboretum. This cruise can be enhanced with a new pre- or post-cruise land program in Brittany, featuring the high-walled city of St. Malo and the magical island monastery of Mont St. Michel, and one night in Paris.

For foodies and wine connoisseurs, AmaWaterways’ new 7-night Essence of Burgundy & Provence between Chalon-Sur-Saône and Arles is certain to delight their palates with excursions to a culinary school in Valence, along with Chalonnaise and Mâconnaise wine tastings, among others. During a new land program in Geneva, Switzerland, they can visit Geneva’s lakeside medieval fortress, Chillon Castle; Annecy, the “Pearl of the French Alps”; and Dijon, the capital of the historic Burgundy region.

Romantics can live out fairytale fantasies during a 7-night Rhine Castles & Swiss Alps cruise between Basel, Switzerland and Amsterdam, Netherlands. Storybook castles, historic vineyards and the stunning remnant of a world frozen over with glaciers, Italy’s Lake Como, are part of the experience when your clients book an all-encompassing 12-night cruise and land adventure. They’ll also witness the dramatic peaks of the Swiss Alps and Lucerne’s glistening lake, as well as Bellagio, the “Pearl of Lake Como.”

AmaWaterways’ new 7-night Best of Holland & Belgium roundtrip Amsterdam cruise offers all the beauty these countries have to offer with visits to Utrecht’s De Haar Castle – the largest castle in Holland; the majestic Castle of the Counts and the UNESCO-designated Kinderdijk Windmills; as well as Belgium’s magical gems, Ghent and Bruges; and Holland’s oldest city, Dordrecht.

For guests traveling on cruises beginning or ending in Luxembourg, they can enjoy a new 2-night land extension in France’s celebrated Champagne region (Reims), with visits to Hautvillers, Epernay, and Champagne makers of Veuve Clicquot and Moet et Chandon; plus, one night in Paris.

Early Booking Discounts
Encourage your clients to book by April 30, 2020 for 5% savings on balcony staterooms and suites – plus, up to $1,500 off per stateroom on select 2021 departures! And remember, you earn generous commission on AmaWaterways’ pre- and post-cruise land programs, so be sure your clients maximize their time in Europe with these seamless experiences.

Book your clients’ 2021 river cruise adventure by calling 1.888.626.1399 or visit the Travel Advisor Portal at AmaWaterways.com today!
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Book your clients’ 2021 river cruise adventure by calling 1.888.626.1399 or visit the Travel Advisor Portal at AmaWaterways.com today!
Slightly more than half of respondents (52%) said they or somebody else in their agency specializes in River Cruises. As a comparison, it’s significantly higher than when we asked the same question in our Outlook on Expedition Cruises (20%), which perhaps speaks to the evolution of River Cruises becoming a bread-and-butter segment for many agencies.

One agent put it this way: “I specialize in cruises; river cruises are a sub specialty.” Several respondents told us that having advisors who specialize in the category is part of being a full-service agency. “We service all types of travel,” she said. Another added, “I sell river cruises as part of my full service travel agency.”

Still, many respondents (44%) said they are active sellers of river cruises, although they don’t consider themselves specialists. “We don’t specialize in this but a significant portion of my sales come from river cruises,” said one advisor.

Another said, “We are knowledgeable and sell them, but I don’t consider us specializing in river cruises.” One advisor said, “I specialize in luxury cruises and propose river cruises as alternative to my clients.”

Do you, if answering individually, or does your agency, if answering as an owner/manager, specialize in River Cruises?

![Chart 1]

- **Yes**: 52%
- **No**: 44%
- **Not Sure**: 5%
WE LOVE OUR TRAVEL ADVISORS

As part of our continued commitment to supporting you in growing your business, we are pleased to introduce you to valuable new travel advisor tools and incentives.

AmaAcademy
AmaWaterways’ interactive new travel advisor training program. Unlock special FAM rates and earn a $50 digital Mastercard reward!

Webinar Wednesdays
Join our new webinar series created just for our loyal travel partners. These informative sessions are hosted by AmaWaterways executives and are designed to help you grow your business and gain a deeper understanding of our itineraries, ships and points of distinction.

Sell Five, Sail Free Incentive
The more river cruises you sell, the closer you become to experiencing the AmaWaterways difference!

Book your clients’ next river cruise adventure by calling 1.888.626.1399 or visit the Travel Advisor Portal at AmaWaterways.com today.
The readers of Travel Market Report, who were the respondents to this survey, are having a big year. Nearly 8 in 10 (77%) said that personal or agency sales have increased in the past year, with another 20% saying revenues were flat.

Fifty-four percent (54%) said sales increased by more than 10% while 30% said sales increase by more than 25% and one in eight (12%) said sales have jumped by more than 50% in the past year.

Of the 3% who saw sales fall, several commented that the decline was based on personal situations, such as caring for sick relatives or personal injuries.

Canadian agents said they were enjoying similar success with 68% seeing increased revenues and 28% saying business was flat. Ten percent (10%) said sales had increased by over 50%.
River Cruise sales over the past 12 months saw similar jumps to overall advisor/agency sales with 69% of respondents marking an increase versus 21% saying they were flat. Only 4% had a decrease.

Six percent (6%) said they had no River Cruise sales in the past 12 months. Those respondents told us it’s because they are newly minted advisors, and that they expect to begin selling river cruises soon. A quarter of respondents (25%) said sales increased by more than 25% and 43% said they had double digit gains.

Over the PAST 12 months, how have your personal River Cruise Sales if answering for yourself, OR agency’s River Cruise Sales, if answering as an owner/manager, changed?

- **Up more than 50%**: 10%
- **Up 26-49%**: 15%
- **Up 11-25%**: 18%
- **Up 6-10%**: 13%
- **Up 1-5%**: 13%
- **Flat**: 21%
- **Down 1-5%**: 2%
- **Down 6-10%**: 1%
- **Down 11-25%**: 1%
- **Down 26-50%**: 0%
- **Down more than 50%**: 0%
- **We had no River Cruise Sales in the past 12 months**: 6%
Advisors are bullish on future sales of River Cruises with 87% projecting an increase over the next 12 months, including 43% who expect sales to go up by more than 10%. A further 22% are expecting gains of more than 25%.

While 12% are forecasting a flat market, no respondents expect a decrease and only 1% of respondents said they don’t expect to sell any River Cruises in the next 12 months.

Not all the sales are single cabins, either. One agent told us, “I have chartered a ship for 2021 and may do another.”

A new agent said she “plans to have several cruise nights presenting river cruise options.”

**Over the NEXT 12 months, how do you expect your personal River Cruise Sales if answering for yourself, OR agency’s River Cruise Sales, if answering as an owner/manager, to change?**
Advisors are key to guiding the customer’s journey in selecting a River Cruise, whether it’s entirely dependent on them from the get-go or helping select the most appropriate cruise line, itinerary, or destination.

While the market and profile of River Cruises may have grown over the past two decades, a quarter of all agents (25%) told us customers “wouldn’t have considered a river cruise if I hadn’t recommended it to them.”

“They are generally not familiar with river cruises,” said one advisor, while another added, “Most (clients) have never heard of river cruises.”

Only 33% of advisors say they have clients who “come to me with a specific River Cruise Line and I book it” while a like number (33%) said, “If I don’t think it’s right, I recommend something else.”

Most respondents (56%) said while customers have “a general idea” of suppliers, that is the starting point for discussion. A similar number (54%) said consumers come with a “specific destination/itinerary/river they want to cruise, and then we discuss the options.”

In a world where the top 100 advertisers spent $267 billion last year, according to Ad Age, agents say River Cruise Lines, with limited budgets, have done little to build awareness of their brands with consumers.

“Most clients have only heard of one or two specific river cruise companies and have no idea what is actually out there,” said an advisor.

River cruising has also developed true advocates with the retail trade. “I suggest river cruises even when they come in for something else,” one advisor said.

Agents gave us plenty of specific examples on how they drive category decisions. “We had an affinity group of ballroom dancers that was looking at a Mediterranean cruise. We told them about river cruises in Europe, and advised them river cruises are smaller, more exclusive, and we could arrange special excursions just for them.”

**Generally speaking, in regards to my clients for River Cruises (Check all that apply):**

- They come to me with a general idea of River Cruise Lines they are interested in and then we discuss the options
- They come to me with a specific destination/itinerary/river they want to take, and then we discuss the options
- They generally aren’t familiar with the River Cruise Lines or Ships, and they come to me for my recommendations
- They come to me with a specific River Cruise Line, but if I don’t think it’s right, I recommend something else
- They come to me with a specific destination/itinerary/river they want to travel with, but I usually suggest a River Cruise Line
- They come to me with a specific River Cruise Line and I book it
- They wouldn’t have considered a river cruise if I hadn’t recommended it to them

![Chart showing percentages](chart-5.png)
The most common trait among River Cruise customers is they are well traveled, with 81% of respondents answering so. While 64% said, “They want inclusive travel that includes meals such as guided tours and cruises,” an equal number (64%) said, “They also travel independently.”

There is also crossover with Guided/Escorted Group Tours (51%), Luxury Hotels/Resorts (47%), Luxury Ships (45%), and Mega Ships (27%).

It’s crucial not to generalize. One agent told us, “I just took a large group that I have had three successful sailings on Carnival with 200 to 250 in the group each time. I pitched a river cruise to them on their last Carnival cruise. We are chartering the ship and booked 50% of it within two weeks. I am booking daily into this group as we continue. For most it will be their first river cruise.”

Still, River Cruises don’t appear to be a gateway to other types of Cruising. Only 16% say they are first-time cruisers.

Nearly half (49%) said customers “like to travel as a couple or with immediate family” with 39% saying they travel in friends and family groups. Only 14% said “they prefer to travel in a group as opposed to on their own.”

**Thinking about River Cruise customers, which statements best describe their previous travel preferences (check all that apply):**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>They are well traveled</td>
<td>81%</td>
</tr>
<tr>
<td>They want inclusive travel that includes meals like guided tours &amp; cruises</td>
<td>64%</td>
</tr>
<tr>
<td>They also travel independently</td>
<td>60%</td>
</tr>
<tr>
<td>They also travel on guided/escorted group tours</td>
<td>51%</td>
</tr>
<tr>
<td>They like to travel as a couple or with immediate family</td>
<td>50%</td>
</tr>
<tr>
<td>They use river cruises to visit destinations for the first time</td>
<td>49%</td>
</tr>
<tr>
<td>They also stay in luxury hotels and resorts</td>
<td>47%</td>
</tr>
<tr>
<td>They also sail on luxury ships</td>
<td>45%</td>
</tr>
<tr>
<td>They like to travel in friends and family groups</td>
<td>39%</td>
</tr>
<tr>
<td>They also sail on mega ships</td>
<td>27%</td>
</tr>
<tr>
<td>They like to travel to exotic and remote destinations</td>
<td>25%</td>
</tr>
<tr>
<td>They don’t like ocean cruises</td>
<td>21%</td>
</tr>
<tr>
<td>They are first-time cruisers</td>
<td>16%</td>
</tr>
<tr>
<td>They prefer to travel in a group as opposed to on their own</td>
<td>14%</td>
</tr>
<tr>
<td>They also sail on expedition cruises</td>
<td>13%</td>
</tr>
<tr>
<td>They are more likely to be concerned about security than other clients</td>
<td>8%</td>
</tr>
</tbody>
</table>
Treat your clients to an unparalleled travel experience that can only be found on the world’s best and most awarded luxury river cruise line.

Our cruises garner an astounding 4.9/5 AVERAGE CUSTOMER rating on Feefo, an independent review platform.

Each butler assumes the role of butler 100% of the time and is trained to the same standards required by BUCKINGHAM PALACE.

Our itineraries feature EXCLUSIVE EXPERIENCES reserved solely for Uniworld guests—like private early access to popular museums.

To learn more about the “#1 RIVER CRUISE LINE” as voted by readers in the Travel + Leisure 2019 World’s Best Awards, VISIT UNIWORLD.COM OR CALL 1-800-653-4296.
While there is a plethora of new vessels, advisors overwhelmingly (84%) said clients are “most interested in the destinations and itinerary of the cruise.” While 50% said they have clients who would choose a destination over a new vessel, only 8% said clients “would take a newer vessel over an itinerary.”

Many agents told us they like the extra earning opportunities that pre-and-post cruise travel provides, and 62% said they have clients who “often combine pre- or post-cruise land vacations with a river journey.”

The food (68%), enjoying culture and visiting museums (66%), cultural experiences with locals (65%), history (51%), active shore excursions such as biking and walking tours (46%), visiting wineries and wine tastings (37%), and wanting to visit places that are hard to reach by land (27%) were all cited as reasons customers cruise on the river. With Canadian agents, food (77%) was more heavily cited.

Even with the heavy amount repeat river cruise clients, 52% of agents tell us clients, “see the different river cruise lines as being similar and need my help to select the right one.”

While nearly half (48%) said “they want a luxury experience as part of their river cruise,” a third (33%)

### Characteristics of River Cruise Clients

Thinking about all of your customers whom you book on River Cruises (check all that apply):

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>They are most interested in the destinations and itinerary of the cruise</td>
<td>84%</td>
</tr>
<tr>
<td>Food is an important part of their vacation experience</td>
<td>68%</td>
</tr>
<tr>
<td>They enjoy culture and visiting museums</td>
<td>66%</td>
</tr>
<tr>
<td>They want a cultural experience with locals they will meet</td>
<td>65%</td>
</tr>
<tr>
<td>They often combine land vacations pre- or post- River Cruise</td>
<td>62%</td>
</tr>
<tr>
<td>The destination was on their bucket list</td>
<td>58%</td>
</tr>
<tr>
<td>They see River Cruises as an alternative to Escorted/Guided Tours</td>
<td>56%</td>
</tr>
<tr>
<td>They see the different River Cruise Lines as being similar and need my help to select the right one</td>
<td>52%</td>
</tr>
<tr>
<td>They are history buffs</td>
<td>51%</td>
</tr>
<tr>
<td>They would choose a destination they want to cruise to over a newer vessel</td>
<td>50%</td>
</tr>
<tr>
<td>They want a luxury experience as part of their River Cruise</td>
<td>48%</td>
</tr>
<tr>
<td>They are interested in active shore excursions, such as biking or walking tours</td>
<td>46%</td>
</tr>
</tbody>
</table>
said “they understand vessels may not have the same luxuries and service levels as the hotels and ships they normally use.”

Over half of customers (56%) see river cruises as an alternative to escorted tours, perhaps a good reason major players in the guided market have offerings in both categories.

Nearly 6 in 10 (58%) say River Cruises are a way to check destinations off their bucket lists.

While agents tell us one attraction of being on a ship is only having to unpack once, only 10% said clients view cruising as an alternative to renting a car.

And even though sustainability is front and center with many suppliers, only 10% said they have clients who ask about the environment and sustainability practices of the lines and ships they are considering.

Also, with limited importance, spa and fitness facilities were mentioned by only 6% of agents as being a deciding factor.

Most of all, River Cruises are considered an easy way to see the places you want to go and customers come back happy. “You are traveling right through the heart of each country and can see the history first hand as you cruise,” was the response from an advisor, while another told us, “It is rare for us to get a valid complaint from one of our clients about their river cruise experience.”

Thinking about all of your customers whom you book on River Cruises
(check all that apply):

- They are oenophiles, and enjoy visiting wineries and wine tastings
- They understand that a River Cruise Ship may not have the same luxuries and service levels as the hotels and ships they normally use
- They want to visit destinations that are hard to reach via land
- They see River Cruises as part of their own ‘learning path’
- They prefer all types of cruise vacations over land vacations
- They are interested in cruise departures with specific themes or onboard programming (wine cruises, guest speakers, etc.)
- They ask me about the environment and sustainability practices of the cruise line and ships they sail on
- They see River Cruises as an alternative to renting a car
- They would choose a newer vessel over an itinerary
- The vessels’ spa and fitness facilities are important when choosing a River Cruise
- They choose suppliers based on the environmental and sustainability practices of that company
The main destinations for river cruising - Central Europe, including Holland, Germany, Austria, Switzerland, Hungary, Romania, Bulgaria, Serbia, Croatia, Czech Republic - go from strength to strength.

Over half of respondents (52%) said these are the places, home to the major rivers of the continent, clients are “Extremely Interested” in visiting, nearly double France (28%) and more than double Portugal’s Douro River (23%), which is often combined with land vacations to Spain.

In terms of overall interest (Extremely, Very and Somewhat Interested), France ranked highest (98%), followed by Portugal and Spain (94%), Italy (87%), US/Canada (81%), UK (72%), Russia (71%), Vietnam/Cambodia (69%), Egypt (64%), and China (64%). Several agents told us there is interest in the Amazon.

Getting clients to go someplace out of their comfort zone isn’t always easy. One agent said, “I truly wish I could convince people to go to Africa. My experience is that it’s a decision they’ve made before they come to me.”

### Destination Interest for River Cruises

When it comes to taking a River Cruise, what is the level of interest of your customers in the following destinations:

<table>
<thead>
<tr>
<th>Destination</th>
<th>Extremely Interested</th>
<th>Very Interested</th>
<th>Somewhat Interested</th>
<th>Not Interested At All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central Europe – Holland, Germany, Austria, Switzerland, Hungary, Romania, Bulgaria, Serbia, Croatia, Czech Republic</td>
<td>52%</td>
<td>39%</td>
<td>9%</td>
<td>0%</td>
</tr>
<tr>
<td>France</td>
<td>28%</td>
<td>48%</td>
<td>22%</td>
<td>2%</td>
</tr>
<tr>
<td>Portugal &amp; Spain</td>
<td>23%</td>
<td>39%</td>
<td>32%</td>
<td>6%</td>
</tr>
<tr>
<td>Italy</td>
<td>22%</td>
<td>31%</td>
<td>34%</td>
<td>13%</td>
</tr>
<tr>
<td>U.S/Canada</td>
<td>10%</td>
<td>23%</td>
<td>48%</td>
<td>19%</td>
</tr>
<tr>
<td>UK</td>
<td>9%</td>
<td>22%</td>
<td>40%</td>
<td>28%</td>
</tr>
<tr>
<td>Vietnam/Cambodia</td>
<td>7%</td>
<td>21%</td>
<td>41%</td>
<td>31%</td>
</tr>
<tr>
<td>Russia</td>
<td>7%</td>
<td>21%</td>
<td>43%</td>
<td>29%</td>
</tr>
<tr>
<td>Egypt</td>
<td>5%</td>
<td>17%</td>
<td>42%</td>
<td>36%</td>
</tr>
<tr>
<td>China</td>
<td>4%</td>
<td>15%</td>
<td>45%</td>
<td>36%</td>
</tr>
<tr>
<td>Africa - except Egypt</td>
<td>4%</td>
<td>13%</td>
<td>37%</td>
<td>46%</td>
</tr>
<tr>
<td>India</td>
<td>1%</td>
<td>6%</td>
<td>32%</td>
<td>61%</td>
</tr>
</tbody>
</table>
“Too Expensive” was the top obstacle — 55% of agents said they have clients who are deterred by price. It was mentioned by 71% of Canadian advisors, a statistically significant difference for the overall sample.

“While the river cruise industry has definitely grown since I have been selling river cruises over the past six years, it’s becoming harder as more people are being attracted but they are mostly not good prospects because of income level,” said one respondent.

Other agents said price objections have more to do with showing value to a prospect. They would like more support from lines in explaining the value of River Cruises to clients (See Section 14: Support Most Needed).

Beyond that, all respondents said re-routings and disruptions due to low water (53%) are a barrier, followed by lack of interested clientele (24%), not enough personal experience to sell with confidence (23%), and lack of inventory for the times and places my clients want to go (23%).

Nearly a quarter of advisors (24%) said they have no obstacles to increasing sales of river cruises, while only 11% said they had seen a decline in customer interest, and only 2% said quality of current river cruise ships is lacking.

Agents also commented on other roadblocks mentioned by clients including “boring” evening entertainment, small cabins, not enough larger suites, lack of solo cabins, access challenges for travelers with disabilities, side-by-side docking, and extended advance payment requirements.

What are the biggest obstacles to selling more River Cruises? (check all that apply)
Cruisers can be choosers.

Who says your clients can’t rise when they like, dine when they want, and explore as they wish? On an Avalon cruise, schedules give way to whims, leaving your clients the freedom to do exactly as they please, when they please. Oodles of included excursions are on every cruise, from in-depth sightseeing to local discoveries and active pursuits...whatever floats their boat. Sail with us and one thing is certain—your clients are free to rock their style their way.
Your view of the world is about to change—big time. At Avalon, we transformed ordinary cruise cabins into our one-of-a-kind Open-Air Balcony™, starring cruising’s only bed with a view and the space to take it all in. Pair panoramic scenes with the widest-ranging excursion choices in river cruising for an experience as wide open as the view.

Sail with us and one thing is certain—your outlook has never been brighter.

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ADVISORS BASED IN THE US: For more information, visit GLOBUSFAMILYPARTNER.COM or call us at 800.221.0090
While price may be an objection with some clients, perhaps the willingness of those customers who buy river cruises to spend led 74% of agents to tell us, “They are among my highest spending, most profitable clients.” That was 10 points higher than when we asked the same question in our TMR Outlook on Expedition Cruises.

“I have been selling River Cruise for the last 11 years and it has been profitable,” said one advisor.

Another told us, “In 2006 my wife and I booked an inside cabin on the ship named Amadeus with Gate 1. We choose the cheapest cabin to experience river cruising for the first time. We loved every concept river cruising offered. While flying home we discussed how our retirement town of Venice, Florida would love and embrace this product. We decided to make a big effort to sell river cruises. By 2009 river cruising had become the most profitable segment of our company, and 10 years later it still is.”

**Which best describes your clients who take River Cruises?**

- They are among my highest spending, most profitable clients: 74%
- Their spending is about the same as my typical clients: 23%
- They typically spend and travel less than most of my clients: 3%
Future Targets For River Cruising

Boomers (69%) and Luxury Travelers (63%) who have not taken a River Cruise before being “the best new prospects over the next 24 months” were tabbed “Very Likely” by the most advisors.

Overall (Very Likely + Somewhat Likely) advisors said they also believe Clients who take multiple seven-plus day vacations annually (86%), Family and Friends Groups (81%), Generation X (77%), Silents (69%), and Incentive and Affinity Group Clients (52%) are also solid prospects for the category.

Still, opportunities to sell River Cruises are broader than some might think.

“I did not think about recommending a river cruise to clients as my impression was that it was for really old people. Then, I sailed on a river cruise, and found out what a great way to travel it really is for any age, and have been recommending them ever since,” one advisor told us.

Another said she has found River Cruises are ideal for honeymooners. “I have 10 couples booked right now,” she said.

Several agents who believe there is demand from solo travelers are looking for the lines to offer solo cabins, an interesting comment when put together with feedback from several agents that there is not enough inventory of larger suites. Perhaps there is a way to design a vessel with a combination of larger suites and cabins for singles.

Thinking toward the future, which segments of your current customer base who have not taken a River Cruise are your best prospects to sell a River Cruise in the next 24 months:

<table>
<thead>
<tr>
<th>Segment</th>
<th>Very Likely</th>
<th>Somewhat Likely</th>
<th>Unlikely</th>
<th>I Don’t Have These Type of Clients</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boomers (ages 55 to 73)</td>
<td>69%</td>
<td>30%</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>Luxury Travelers</td>
<td>63%</td>
<td>33%</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>Clients who take multiple 7+ day vacations annually</td>
<td>37%</td>
<td>49%</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Family and Friend Groups</td>
<td>28%</td>
<td>53%</td>
<td>18%</td>
<td>1%</td>
</tr>
<tr>
<td>Generation X (ages 39-54)</td>
<td>19%</td>
<td>58%</td>
<td>20%</td>
<td>3%</td>
</tr>
<tr>
<td>Silent (ages 74 to 91)</td>
<td>19%</td>
<td>50%</td>
<td>22%</td>
<td>9%</td>
</tr>
<tr>
<td>Incentive and Affinity Group Clients</td>
<td>17%</td>
<td>35%</td>
<td>27%</td>
<td>21%</td>
</tr>
<tr>
<td>Millennials (ages 23 to 38)</td>
<td>2%</td>
<td>22%</td>
<td>65%</td>
<td>10%</td>
</tr>
<tr>
<td>Generation Z (ages 7 to 22)</td>
<td>0%</td>
<td>6%</td>
<td>62%</td>
<td>31%</td>
</tr>
</tbody>
</table>
We identified 59 companies that sell river cruises, and common comments from agents is there are a lot more suppliers than they were aware of. In fact, only 13 had 80% awareness, and the vast majority, over 40 of the companies (not all shown), had less than 50% awareness with this audience of heavy sellers in the segment.

“If I don’t know about them, I can’t sell them. If they want business from agents, they need to do more,” said one advisor. Another added, “Whew I am embarrassed about so many unfamiliar companies.”

Of the long list, AmaWaterways and Viking River Cruises were the most widely sold (85%). Other widely sold lines included Avalon Waterways (79%), Uniworld/U by Uniworld (71%), Tauck River Cruises (65%), Crystal River Cruises (64%), American Queen Steamboat Company (58%), American Cruise Lines (57%), Emerald Waterways (52%), Scenic Luxury Cruises (51%), G Adventures (46%), and Abercrombie & Kent (41%).

There was a big difference in how Canadian agents answered this question, with the main finding being that only a few lines had broad penetration, led by Emerald Waterways (51%), G Adventures (44%), Avalon Waterways (44%), Viking (43%), Scenic (42%), AmaWaterways (41%), Uniworld (41%), Crystal (37%), Tauck (35%), and American Queen (31%).

Either way, there seems to be an opportunity for many of these companies to build sales through retail travel agencies if they can generate awareness to start.

“There are so many lines I have never heard of. Training on those would be wonderful,” said one agent, while another noted, “I have the ability to book any cruise...”

Please check off the most appropriate box for each of the below River Cruise Lines:

<table>
<thead>
<tr>
<th>Company</th>
<th>I/My Agency Sells This Company</th>
<th>I Am Not Familiar with This Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>AmaWaterways</td>
<td>85%</td>
<td>2%</td>
</tr>
<tr>
<td>Viking River Cruises</td>
<td>85%</td>
<td>3%</td>
</tr>
<tr>
<td>Avalon Waterways</td>
<td>79%</td>
<td>4%</td>
</tr>
<tr>
<td>Uniworld/U by Uniworld</td>
<td>71%</td>
<td>4%</td>
</tr>
<tr>
<td>Tauck River Cruises</td>
<td>65%</td>
<td>6%</td>
</tr>
<tr>
<td>Crystal River Cruises</td>
<td>64%</td>
<td>6%</td>
</tr>
<tr>
<td>American Queen Steamboat Company</td>
<td>58%</td>
<td>6%</td>
</tr>
<tr>
<td>American Cruise Lines</td>
<td>57%</td>
<td>8%</td>
</tr>
<tr>
<td>Emerald Waterways</td>
<td>52%</td>
<td>8%</td>
</tr>
<tr>
<td>Scenic Luxury Cruises &amp; Tours</td>
<td>51%</td>
<td>8%</td>
</tr>
<tr>
<td>G Adventures</td>
<td>46%</td>
<td>14%</td>
</tr>
<tr>
<td>Abercrombie &amp; Kent</td>
<td>41%</td>
<td>15%</td>
</tr>
<tr>
<td>Amadeus River Cruises</td>
<td>28%</td>
<td>19%</td>
</tr>
<tr>
<td>European Waterways</td>
<td>18%</td>
<td>34%</td>
</tr>
<tr>
<td>Belmond</td>
<td>16%</td>
<td>42%</td>
</tr>
</tbody>
</table>

Chart 12-a continued on next page

---
Please check off the most appropriate box for each of the below River Cruise Lines:

<table>
<thead>
<tr>
<th>River Cruise Company</th>
<th>I/My Agency Sells This Company</th>
<th>I Am Not Familiar with This Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crosieurope</td>
<td>16%</td>
<td>43%</td>
</tr>
<tr>
<td>St. Lawrence Cruise Lines</td>
<td>15%</td>
<td>44%</td>
</tr>
<tr>
<td>French Country Waterways</td>
<td>14%</td>
<td>48%</td>
</tr>
<tr>
<td>Victoria Cruises</td>
<td>14%</td>
<td>51%</td>
</tr>
<tr>
<td>Fred. Olsen River Cruises</td>
<td>12%</td>
<td>54%</td>
</tr>
<tr>
<td>Zambezi Queen</td>
<td>12%</td>
<td>54%</td>
</tr>
<tr>
<td>Riviera Travel River Cruises</td>
<td>11%</td>
<td>56%</td>
</tr>
<tr>
<td>APT – Australia Pacific Touring River Cruises</td>
<td>11%</td>
<td>58%</td>
</tr>
<tr>
<td>Wendy Wu River Cruises</td>
<td>10%</td>
<td>58%</td>
</tr>
<tr>
<td>Aqua Expeditions</td>
<td>9%</td>
<td>59%</td>
</tr>
<tr>
<td>A-Rosa</td>
<td>8%</td>
<td>60%</td>
</tr>
<tr>
<td>Grand Circle Cruise Line</td>
<td>7%</td>
<td>62%</td>
</tr>
<tr>
<td>KD Cruise Services</td>
<td>7%</td>
<td>63%</td>
</tr>
<tr>
<td>Vantage World Deluxe</td>
<td>5%</td>
<td>69%</td>
</tr>
</tbody>
</table>

line, but am unaware of many of these listed. I would have to know who they are and why to book them over anyone else.”

Getting the word out is the starting point. Speaking about companies she wasn’t familiar with, an advisor said, “You show up. We sell you. Simple.”

Typical comments included, “I have not sold many of the listed yet, but I plan to make it my business to learn about them” and “I would like to know more about the ones I am familiar with as well as those about whom I am not.”
While we found at least some advisors who sold all of the 59 companies we identified, Viking River Cruises (41%), AmaWaterways (39%), Uniworld/U by Uniworld (28%), Avalon Waterways (27%), Tauck River Cruises (21%), and Crystal River Cruises (21%) had the most advisors who said either they or their agencies had been recognized as top producers.

We were also interested if a top producer for one line was also a top producer for another.

Of respondents who told us they were top producers for Viking, 65% said they were also top producers for AmaWaterways, while 53% said they were also top producers for Uniworld and 52% of Avalon. In fact, 92% of Viking’s top producers also said they sell AmaWaterways, 88% Avalon, 85% Uniworld, and 80% Tauck.

For AmaWaterways, it was similar with 69% of its top sellers say they rank as top performers for Viking and 60% holding top status with Uniworld.

Agents explain holding top sales status with multiple lines as matching clients to the company, ships, and itineraries that best meet their needs. Similarly, advisors say even if it means losing an override, they sell based on making sure the customer gets the product that best matches their needs, so while being recognized as a top producer is nice, the client comes first.

For suppliers, it perhaps means digging deeper to understand how their top producers perceive what they are offering versus other lines, and then use those insights to explain to advisors how they are able to cater to those needs, if in fact they do.

### Chart 12-b

<table>
<thead>
<tr>
<th>Company</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Viking River Cruises</strong></td>
<td>41%</td>
</tr>
<tr>
<td><strong>AmaWaterways</strong></td>
<td>39%</td>
</tr>
<tr>
<td><strong>Uniworld/U by Uniworld</strong></td>
<td>28%</td>
</tr>
<tr>
<td><strong>Avalon Waterways</strong></td>
<td>27%</td>
</tr>
<tr>
<td><strong>Tauck River Cruises</strong></td>
<td>21%</td>
</tr>
<tr>
<td><strong>Crystal River Cruises</strong></td>
<td>21%</td>
</tr>
<tr>
<td><strong>Scenic Luxury Cruises &amp; Tours</strong></td>
<td>15%</td>
</tr>
<tr>
<td><strong>Emerald Waterways</strong></td>
<td>12%</td>
</tr>
<tr>
<td><strong>Abercrombie &amp; Kent</strong></td>
<td>12%</td>
</tr>
<tr>
<td><strong>G Adventures</strong></td>
<td>11%</td>
</tr>
</tbody>
</table>

*Note: Sales of River Cruise Companies for each company.*
### Which lines get the most productivity from advisors?

<table>
<thead>
<tr>
<th>Company</th>
<th>Productivity</th>
</tr>
</thead>
<tbody>
<tr>
<td>American Cruise Lines</td>
<td>11%</td>
</tr>
<tr>
<td>American Queen Steamboat Company</td>
<td>11%</td>
</tr>
<tr>
<td>Amadeus River Cruises</td>
<td>6%</td>
</tr>
<tr>
<td>Belmond</td>
<td>4%</td>
</tr>
<tr>
<td>European Waterways</td>
<td>3%</td>
</tr>
<tr>
<td>CroisiEurope</td>
<td>3%</td>
</tr>
<tr>
<td>Victoria Cruises</td>
<td>2%</td>
</tr>
<tr>
<td>French Country Waterways</td>
<td>2%</td>
</tr>
<tr>
<td>St. Lawrence Cruise Lines</td>
<td>2%</td>
</tr>
<tr>
<td>A-Rosa</td>
<td>2%</td>
</tr>
<tr>
<td>APT - Australia Pacific Touring River Cruises</td>
<td>2%</td>
</tr>
</tbody>
</table>
“I would sell this as a solid 4-star cruise with no hesitation. Anyone looking for good value need not look any further.”

Jessie Cassar,
Travel Edge

“The whole vacation from start to finish was flawless. Every staff member did everything they could to ensure we had a totally enjoyable voyage.”

Michael Sacchetti,
Mt. Carmel Travel

“The cabin was bigger than I expected for a river cruise and the bathroom was very impressive – I found the food to be good and plentiful. In the alternative restaurant, The Bistro, the food and service were excellent.”

Veronica Dempter,
Travel Edge

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Mar. 31, Nov. 3, 2020
The Blue Danube
Mar. 27 & 30, Apr. 3 & Nov. 2, 2020
The Douro, Porto & Salamanca
Nov. 8 & 13, 2020
The Seine, Paris & Normandy
Mar. 31, 2020
Medieval Germany
Oct. 24, 2020

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The high client satisfaction of River Cruises and the popularity of their destinations make Word of Mouth (69%) by far the most popular way agents promote them. One agent said, “100% of my river cruise business comes from referrals.”

It also means repeat business. “I just had a group of 10 couples come back from an Avalon River Cruise... They are ready to book for 2021. As a travel agent, this is what makes me happy,” she said.

Agency Websites (58%), My Email List (54%), My Social Media (45%), My Agency’s Social Media (42%), Marketing Programs from My Consortia (38%), Direct Mail (36%), An Email List from My Agency (33%), Events I Host for Potential Clients (32%), and Consortia Websites (31%) were also frequently mentioned.

“We are a new agency less than two years and affected by the Paradise Fire in California. Despite set backs, we have hosted two river cruise nights for consumers and as a result had sales. This is a great way to raise consumer awareness and our own knowledge,” one respondent told us.

Another said, “After a River Cruise Night with AmaWaterways I was able to book seven cabins off of the interest that it generated for my clients that attended.”

And while Incentive and Affinity organizations were only mentioned by 11% of respondents, the payoff can be big. One agent told us, “My church’s travel ministry has used me to book two European river cruises. I have 32 people going on the Castles Along the Rhine cruise with Uniworld.”

Agents also shared how creativity sells. “I partnered with a local wine shop to promote a wine themed river cruise with AmaWaterways and was successful in selling.

Which of the following do you use to promote River Cruises? (check all that apply)

Referrals from existing clients
My agency website
My email list
My social media
My agency’s social media
Marketing programs from my consortia
Direct Mail
An email list from my agency
Events I host for potential clients
10 cabins for a sailing in March 2020,” one advisor told us.

Strategic social media also works. “I think the best form of promoting of river cruises is by posting pictures or blogs of past clients who have had an amazing time on the cruise,” said one agent.

Sometimes it’s taking advantage of tools that are ready and waiting. “Thanks to direct mail from my consortia and preferred suppliers, my river cruise sales have increased 150%,” another agent said.

Which of the following do you use to promote River Cruises? (check all that apply)
Fam trips (82%), followed by content I can share with my customers (61%) are the tools most in demand when we asked advisors what type of additional support they would like. A lower percentage of respondents mentioned webinars (46%), in-person training (45%), and more educational information (45%).

While Canadian advisors were in agreement about Fams (88%), In-person training (63%) was in higher demand than the overall sample.

One agent said she would like “help with cruise nights for prospective clients,” while another said he wanted “better videos I can share with my clients.” Several agents said suppliers should make sure webinars can be replayed so they can watch them later.

Training courses without fams have limited effect. “I have completed all the river cruise companies training that I sell, but have only sailed on one line (and) need to see more,” said one agent.

Another told us, “I believe personal experience is the best incentive. I've sold more river cruises this past year than ever before because of sailing on AmaWaterways and CroisiEurope recently, and more Crystal Rivers and longer cruises since attending Cruise Planners’ Luxury/River Cruising Forum for the past two years.”

Suppliers also need to pay more attention to their collateral. “I need digital content suitable for client consumption that clearly identifies the travel agency and not the vendor. We will not promote a vendor unless the travel agency is clearly the point of contact,” one advisor noted.
ADVISORS SPEAK OUT: A Love Story – River Cruises and the Travel Trade

We asked advisors to share their own stories about selling river cruises. We got nearly 400 responses, many of which we might classify as love letters.

Here are some highlights:

- “River cruises are a fabulous product and everyone comes home satisfied, even with low river levels and other challenges, but getting past the high sticker price is the biggest challenge. Once the sale is made and the clients travel, they are extremely happy, however.”

- “I was fortunate enough to do the Danube 10 years ago and the first-hand information was the best publicity I could pass on to my clients, and I have successfully booked many clients on them.”

- “I am semi-retired, but I still have people calling and wanting me to put together a group river cruise.”

- “Love them! Lots of ocean cruisers have been everywhere and river cruising has opened up a whole new world for them!”

- “I have sold many river cruises, mostly either Viking or Tauck, and have always had repeat customers. Clients always return satisfied with the experience, and the lines do everything in their power to be sure of customer satisfaction.”

- “I have a multi-generational family group that did their first river cruise on Adventures by Disney on AmaWaterways last year. They loved it so much they did a different ABD on AmaWaterways river cruise this year, are looking at another for next year. They are hooked on river cruising.”

- “I have clients who sail Uniworld often, and I do not need to sell them on the idea of repeating.”

- “I love river cruises. I just had a $100,000 booking with Crystal River Cruises.”

- “At first, I was selling Viking River Cruises because of their advertising campaign on our local PBS station. Then I began getting referrals. We had several consumer events, which created more bookings as we were educating the clients on the benefits of river cruising.”
River Cruises may be a relatively new product category, and is often considered a niche, but it is definitely mainstream with 99% of respondents expecting to sell the product in the next year.

It’s also a profitable market with 74% of advisors saying their River Cruise customers are their most profitable. Many agents also told us about how they are making big bucks by selling groups.

Still, agents say they haven’t reached the ceiling with 43% saying they expect sales to increase by double digits in the next 12 months.

Agents say outside of Viking River Cruises, few clients know the other brands, however, that really doesn’t matter.

Most said even when clients come in with a specific brand in mind, they won’t hesitate to recommend somebody else if they feel it better fits that customer’s needs.

With price as the number one objection, agents also say they would like more content they can share with clients that would help them explain the value of River Cruises.

And the good news for supplier and agents is respondents universally say they want to sell more in large part because the high satisfaction levels generate referrals of new clients and repeat bookings. For the lines, retail travel agencies are truly a multiplier.
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