



Image courtesy of Seabourn

# EXPEDITION CRUISE NETWORK

## INSIGHTS REPORT 2023/2024

# WELCOME TO THE EXPEDITION CRUISE NETWORK



## Welcome to the most exciting sector of the travel industry and the inaugural Expedition Cruise Insights Report from the Expedition Cruise Network (ECN).

Spanning UK sales trends, intelligence and challenges from 2023 as well as informed predictions into 2024 and beyond, this report provides a unique deep dive into the fastest growing area of the cruise industry.

Since its launch in April 2023, Martin Johnson, its chair and I, the two co-founders of the ECN have experienced the most incredible response from the industry, and we are both proud and humbled that 18 expedition cruise operators and over 900 travel trade members have joined us to promote expedition cruising as an incredible choice for travellers from across the world.

Expedition cruise operator members are characterised by offering unique, cruise-style holidays onboard small ships with an emphasis on exploration - often to remote destinations.

We set up this membership organisation following two years of the sector doubling in size and a rising demand from expedition

cruise operators for an authentic, trustworthy and authoritative voice for the sector. In 2023 we have again seen growth, and due to buoyant demand, growth is again expected in 2024.

Much of this growth has come from the rising consumer demand for the polar regions and we look at the top sellers across the globe.

We also look at the most important issue of our time – the climate emergency. Our members are mindful of their responsibilities. We recognise their journey and look to their next steps.

*Akvile Marozaitė*

**AKVILE MAROZAITE, CEO**  
Expedition Cruise Network

# METHODOLOGY



Image courtesy of Silversea Expeditions

Research for the data in this report includes responses from two distinct surveys undertaken between October and November 2023.

**The first is a survey of 17 expedition cruise operator members out of the 18 who have joined the Expedition Cruise Network.**

It asked expedition cruise operator members about their sales trends, future expectations, challenges they face in the sector, and more.

*Look out for these two coloured boxes for survey results!*

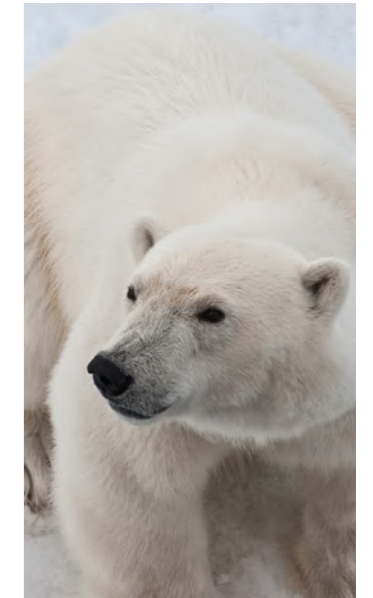
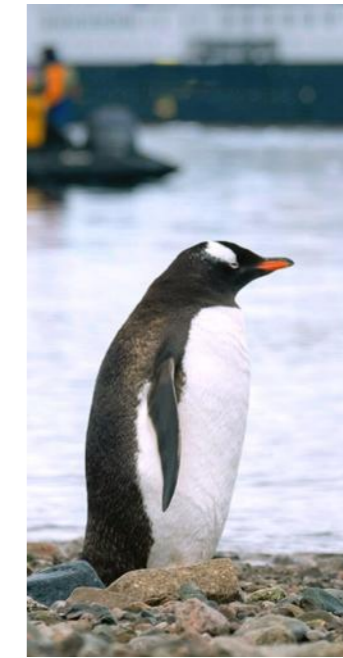
**The second is a survey of over 160 travel trade professionals** who work in the United Kingdom market from within and outside the Expedition Cruise Network's membership.

Amongst topics asked about, respondents revealed information about their relationship with the expedition cruise sector, what support they need from expedition cruise operators to increase sales, and how expedition cruise fits into their wider sales portfolio.

By comparing the two reports, **The Expedition Cruise Insights Report 2023/2024** gives crucial insight into the current state of expedition cruise and indications of future trends.



Image courtesy of Australis Cruises



# CONTENTS

<b>STATE OF THE MARKET</b>	<b>6</b>
<b>SELLING EXPEDITION CRUISE</b>	<b>9</b>
Expedition Cruise Operators	
Challenges	
Product Knowledge	
<b>DESTINATION TRENDS</b>	<b>15</b>
<b>FUTURE OF EXPEDITION CRUISE</b>	<b>19</b>
Sustainability	

# STATE OF THE MARKET



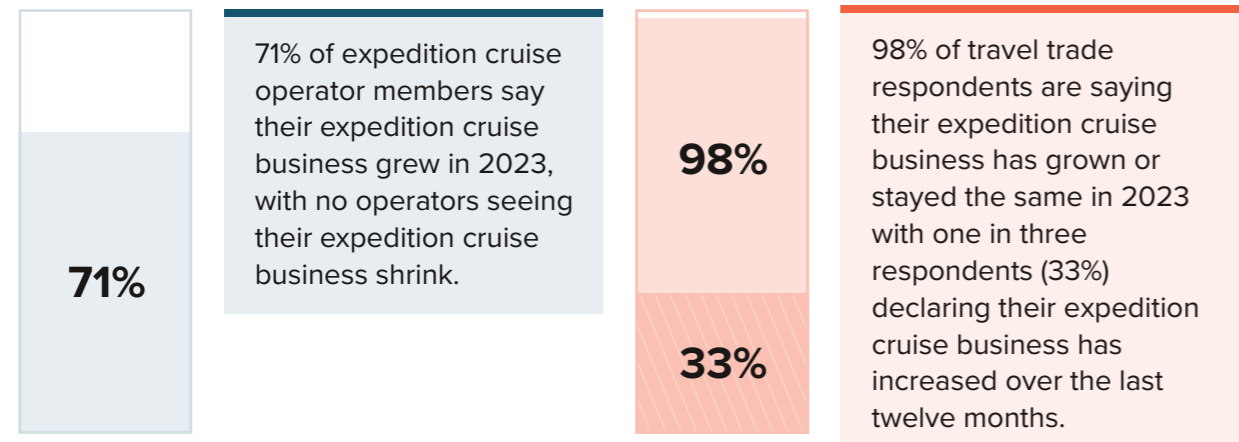
## The 18 expedition cruise ship operators who have joined the Expedition Cruise Network make up a significant share of the expedition cruise market.

According to the Expedition Cruise Market Report 2023 by Cruise Industry News, there are 101 expedition ships in operation worldwide offering 16,406 berths. The Expedition Cruise Network members account for 71% market share and 68% berths sold worldwide. The US market remains the largest market for expedition cruising, followed by Germany and United Kingdom according to this report.

### The expedition cruise operator members of the Expedition Cruise Network are:

- AE Expeditions
- Albatros Expeditions
- Australis Cruises
- Hapag Lloyd Cruises
- Heritage Expeditions
- Intrepid
- Latin Trails
- Lindblad Expeditions
- Metropolitan Touring
- Oceanwide Expeditions
- Polar Latitudes
- Ponant
- Quark Expeditions
- Seabourn Expeditions
- Silversea Expeditions
- Swan Hellenic
- UnCruise Adventures
- HX Hurtigruten Expeditions

Responses from both the expedition cruise operator members and the travel trade reveal the expedition cruise sector is growing significantly.



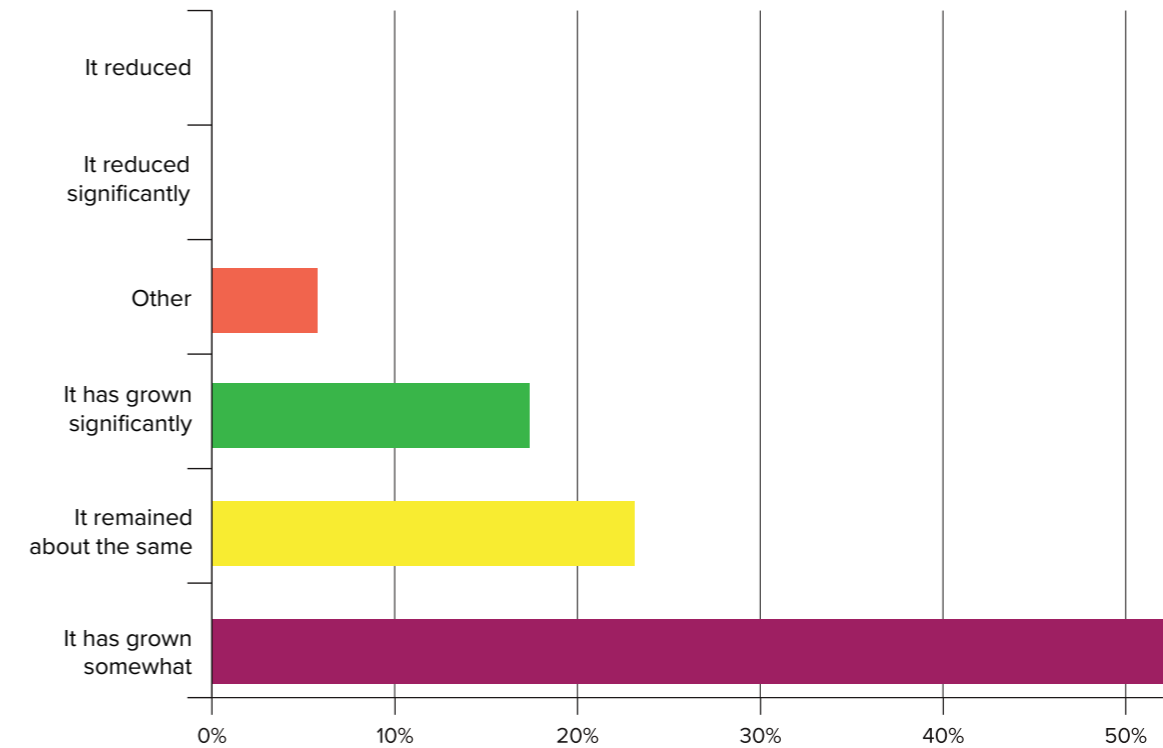
## Akvile Marozaitė, CEO of ECN says:

The post-pandemic realisation that it is unwise to put off bucket list trips, contributed to the growth of the expedition cruise sector in 2021 and 2022, but as travel trends normalised across the rest of the travel industry, expedition cruising still grew substantially in 2023. Due to the reduced number of new ships expected in the market, capacity will slow from double to single digit growth. In addition, more

restrictive regulations will come into force in ecologically sensitive destinations, so booking early will be an imperative.

“There is still growth in this market and travel trade professionals need to think expedition cruise when it comes to capitalising on the continuing demand for personalised small-group, exclusive, experiential travel experiences.”

## In 2023, has your expedition business in UK grown, remained about the same, or reduced?



**£8000pp**

Over half (53%) of expedition cruise operators say their average booking cost is over £8,000 pp

Due to specialist ships, fewer passengers on board, and a high staff to guest ratio, expedition cruise trips, on the whole, have a higher price point than traditional cruise. Over half (53%) of expedition cruise operator members say the average booking cost of a 2023 trip is over £8,000 per passenger and almost a third (29%) report that the average booking cost is over £10,000 per person.

Many of the expedition cruise operator members offer varied length itineraries to polar regions including lengthy voyages

such as the Northwest Passage crossing, some of which can last several weeks or more which incur additional operator costs.

There are also more affordable expedition cruise options which may offer better value in exchange for shorter itineraries. One in six (18%) expedition cruise operator members say the average booking cost of a 2023 trip is under £6,000 per person. Itineraries which are more likely to fit within this price bracket include trips to destinations such as the Galapagos and Patagonia.



Image courtesy of Silversea Expeditions

# SELLING EXPEDITION CRUISE



Image courtesy of HX Expeditions

**35%**

**of expedition cruise operators rely on the UK travel trade for over 20% of their business**

The UK travel trade forms an important part of expedition cruise operator sales but there is room for growth. This is exemplified by **one in three (35%)** ECN expedition cruise operator members relying on the UK travel trade for over 20% of their business. Likewise, 18% of expedition cruise operators rely on the UK travel trade for over 30% of their business.

Direct sales and international travel trade sales continue to play a role for expedition cruise operators with **one in three (35%)** of expedition cruise operators relying on

the UK travel trade for less than 10% of their business.

Strengthening relationships with the UK travel trade may increase expedition cruise operator sales as many travel trade professionals already actively promote expedition cruise. **One in three (35%)** regularly or very regularly promote expedition cruise on social channels, online, over the phone, or in-person and 94% of travel trade respondents proactively promote expedition cruise to some extent.

## **A. Expedition Cruise Operators**

### **HX Hurtigruten Expeditions is the most sold expedition cruise operator according to the UK travel trade**

HX Hurtigruten Expeditions is the most sold expedition cruise company among UK travel trade respondents, with **64% currently selling their products**. HX Hurtigruten Expeditions is one of the largest and most established brands in the expedition cruise sector, having launched its first coastal Norwegian voyages over a century ago in 1893.

Close behind HX Hurtigruten Expeditions are Silversea Expeditions (61%), Seabourn

Expeditions (43%) and Ponant (40%). As expected, larger expedition cruise operators with more product offering have a larger market share. Overall, the market share remains incredibly diverse, with 18 companies seeing their product sold by at least 10% of travel trade respondents.

**The full breakdown of most sold expedition cruise companies is on the following page.**

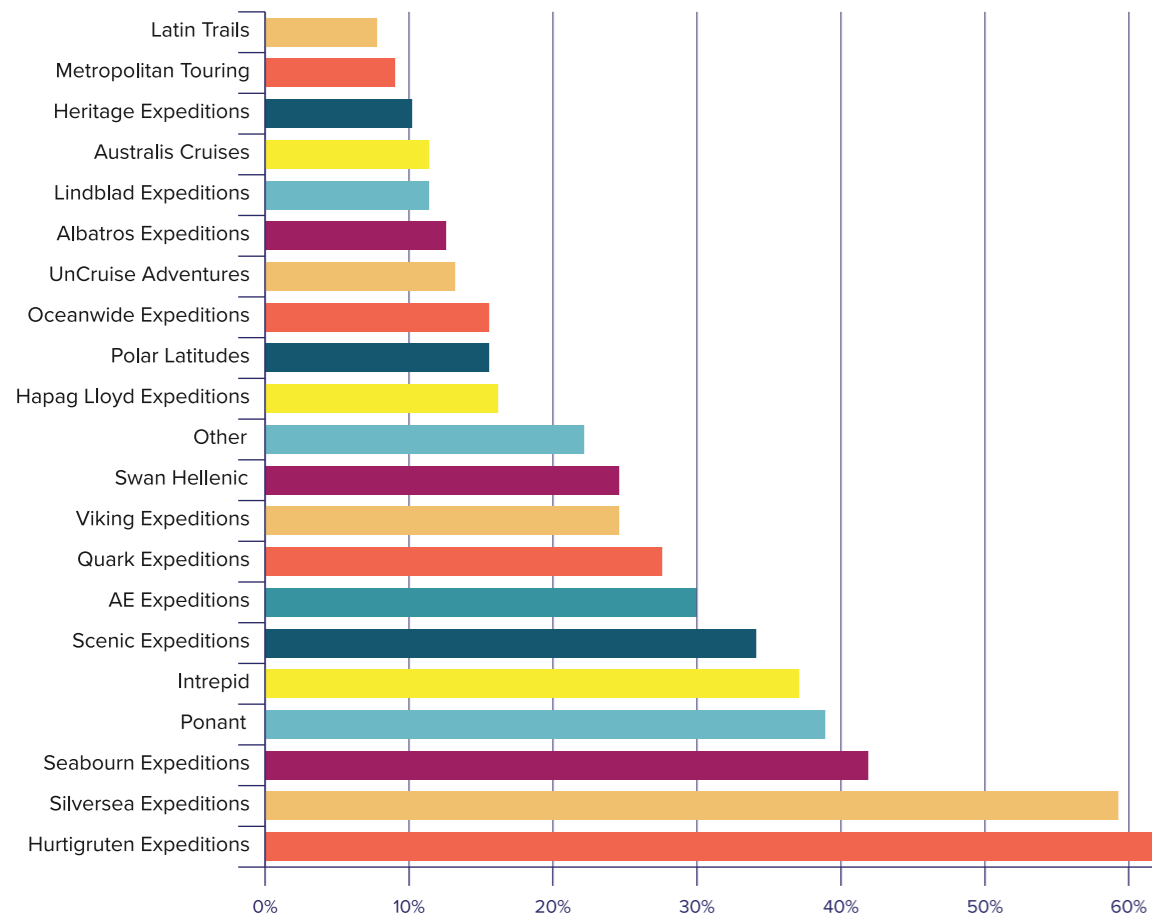
## A. Expedition cruise operators (contd.)



All ECN members see their product sold by at least 8% of respondents. The expedition cruise market is diverse; 18 companies see their product sold by over 10% of respondents.

Martin Johnson, Chairman of ECN says:

Expedition Cruises are big ticket items and can command sizeable commissions and with one in three ECN expedition cruise operator members relying on travel agents for a third of their sales, the travel trade proves time and again that they are valuable sales channels, especially when 94% of the travel agent respondents reported promoting expedition cruise.



## B. Challenges

61%

of the travel trade say finding the right consumer is the biggest challenge faced when selling expedition cruise

For 61% of travel trade respondents, the biggest challenge for selling expedition cruise is finding the right consumer with the right mindset and budget. The travel industry is increasingly competitive, with more options for consumers than ever before, so in order to stand out and secure sales, agents need to lean on expertise and inside knowledge.

Other key challenges include:

1. a lack of firsthand experience (58%),
2. a lack of product knowledge (33%),
3. and not understanding the differences between different cruise brands (32%).

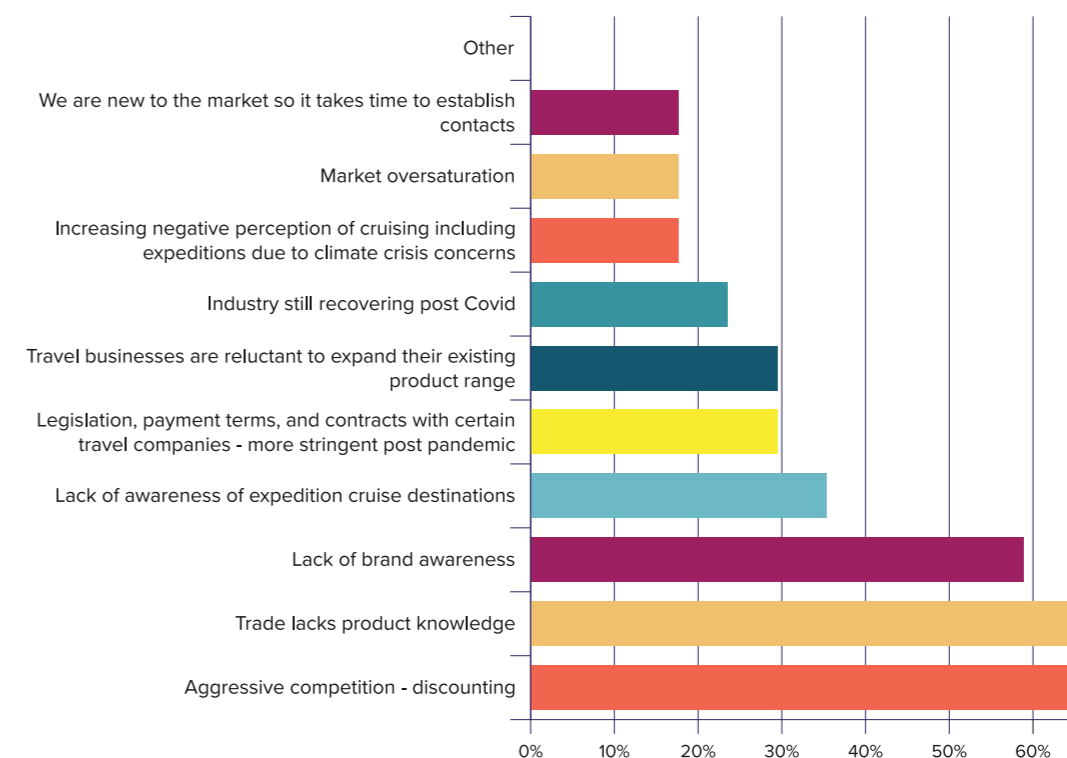
The travel trade lacking product knowledge and aggressive competition are the biggest challenges expedition cruise operators face

Expedition cruise operators agree with their travel trade colleagues on sales challenges, with questions around product knowledge dominating discussions, but equally – at 65% of respondents – expedition cruise operator members believe that aggressive competitor discounting is as great a challenge.

Related to product knowledge, over half – 59% - believe lack of company brand awareness is an issue whilst 35% believe a lack of awareness of expedition cruise destinations is also a challenge.

The full breakdown of the key challenges expedition cruise operators face is below.

### Key Challenges in Selling in the UK Market



## B. Challenges (contd.)

Expedition cruise operator members recognise the need to provide support to agents selling expedition cruise.

76%

of expedition cruise operator members provide dedicated sales resources to help agents sell

However, the importance of the provision of face-to-face opportunities to learn more about a niche sector within the travel industry is the most common theme.

Expedition cruise operators cannot rely solely on digital portals to engage with travel trade professionals. When asked what expedition cruise operators can do better to improve their support, the most common answer from respondents was increase ship visits and fam trips.

59%

of expedition cruise operator members offer a number of cabins for high-value fam trips

71%

organise ship visits to give agents first-hand experience of life on-board

Travel trade respondents have a range of other suggestions for expedition cruise operators to increase sales through the trade. The most common ideas are to clarify the unique selling points of each expedition cruise trip and products.

Agents want to increase expedition cruise sales but many lack the resources to do so. Other recurring comments include requests for social media marketing templates to promote expedition cruise more easily on social channels, and more training, including training certification to give customer confidence.



Image courtesy of Seabourn

## C. Product Knowledge

Martin Johnson, Chairman of ECN says:

For a high value product, such as expedition cruise, agents need to understand the nuances of the sector. We have launched a dedicated online Training Hub for travel trade professionals wishing to increase their expedition cruise knowledge to better sell the sector to consumers.

**The Training Hub has over 100 training videos from the ECN and individual members.**

Webinar topics vary from broad discussions such as cruising trends and popular destination summaries, to introductions to ECN members' expedition itineraries and ships. There is everything from full webinars with the ECN and expedition cruise partners, to ship tours, sustainability activations, how to sell polar regions, new routes for 2024, luxury know-how and cruise line showcase videos for those short on time.

53%

of travel trade respondents say their knowledge of expedition cruise is non-existent to average

39%

of travel trade respondents say expedition cruise operators do not do enough to differentiate their products from other products

There is an urgent need to up-skill travel agents regarding expedition cruise knowledge, including knowledge on destinations, companies, products, and the sector as a whole. Over half (53%) of travel trade respondents say their knowledge of expedition cruise is non-existent to average. While there are respondents who feel confident in their product knowledge, the number is much lower: **just one in four say their knowledge of expedition cruise is superior or expert (28%).**

Not only do travel trade respondents feel that there is an issue with understanding the unique-selling-point of the expedition cruise sector as a whole, but there are also challenges with expedition cruise product differentiation. **39% of travel trade respondents say expedition cruise operators do not do enough to differentiate their products from other products** in their portfolio or products from competitor expedition cruise operators. This is particularly evident in the polar regions where there are multiple cruise operators offering similar trips.

77%

of travel trade respondents want more awareness of expedition cruising in the media

The issue of lack of awareness and product knowledge extends to the media too, impacting both the travel trade's ability to confidently sell and the consumers likelihood to purchase. Three in four (77%) respondents think there needs to be more awareness of expedition cruising in the consumer media.

Meanwhile, **exactly half (50%) of travel trade respondents think there needs to be more awareness of expedition cruising in the travel trade media.** Coverage on expedition cruise destinations, companies, and itineraries serves to boost the profile of the sector as a whole and engage consumers and professionals alike.

# DESTINATION TRENDS

Image courtesy of Lindblad Expeditions

**76%**

of expedition cruise operator members say that Antarctica is a top selling destination for 2023

**47%**

report that Greenland is the second most popular destination

Antarctica remains the leading destination for expedition cruise operator members, with over 76% indicating it as a top-selling destination for both 2023 and 2024. All the top destinations in 2023 show continued popularity into 2024.

Greenland is the second most sold destination for expedition cruising, reported by 47% of members for both 2023 and 2024. Svalbard, the third top-selling destination, shows a similar consistent trend. Other destinations of note include the Galapagos, with 29% of expedition cruise operator members saying it is a top selling destination in 2023 and 35% saying it is a top selling destination for 2024.

**70%**

of expedition cruise operators expect Antarctica to be the destination with the most growth in 2024

**29%**

of expedition cruise operators believe Svalbard is the 2nd most popular destination in 2024

Seventy per cent of expedition cruise operator members named Antarctica as a destination with the most growth in 2024. While not all expedition cruise operator members offer trips to the polar regions, it remains the destination with the most consumer demand. Meanwhile, Svalbard is the destination with the second most expected growth, with 29% of expedition cruise operators naming it as such. The Canadian Arctic, Greenland, and South Pacific Islands are all tied for third place (24%).



**39%**

**of travel trade respondents named Africa (West and East) as the destination most in demand**



<b>35%</b> Indian Ocean	<b>29%</b> Asia
<b>35%</b> Latin America	<b>26%</b> North America

Thirty-nine per cent of travel trade respondents named Africa (West and East) as an expedition cruise destination they want to see further developed with more trips being offered in the future.



Other destination which travels trade respondents want to see include the Indian Ocean (35%), Latin America (35%), Asia (29%) and North America (26%). The range of new destinations demonstrate there is an enormous appetite among the travel trade to be able to sell destinations outside of polar destinations.

**Akvile Marozaitė, CEO of ECN says:**

Expedition cruising really comes to life when exploring hard-to-reach destinations few other people ever witness, which is why the polar regions have enduring appeal.

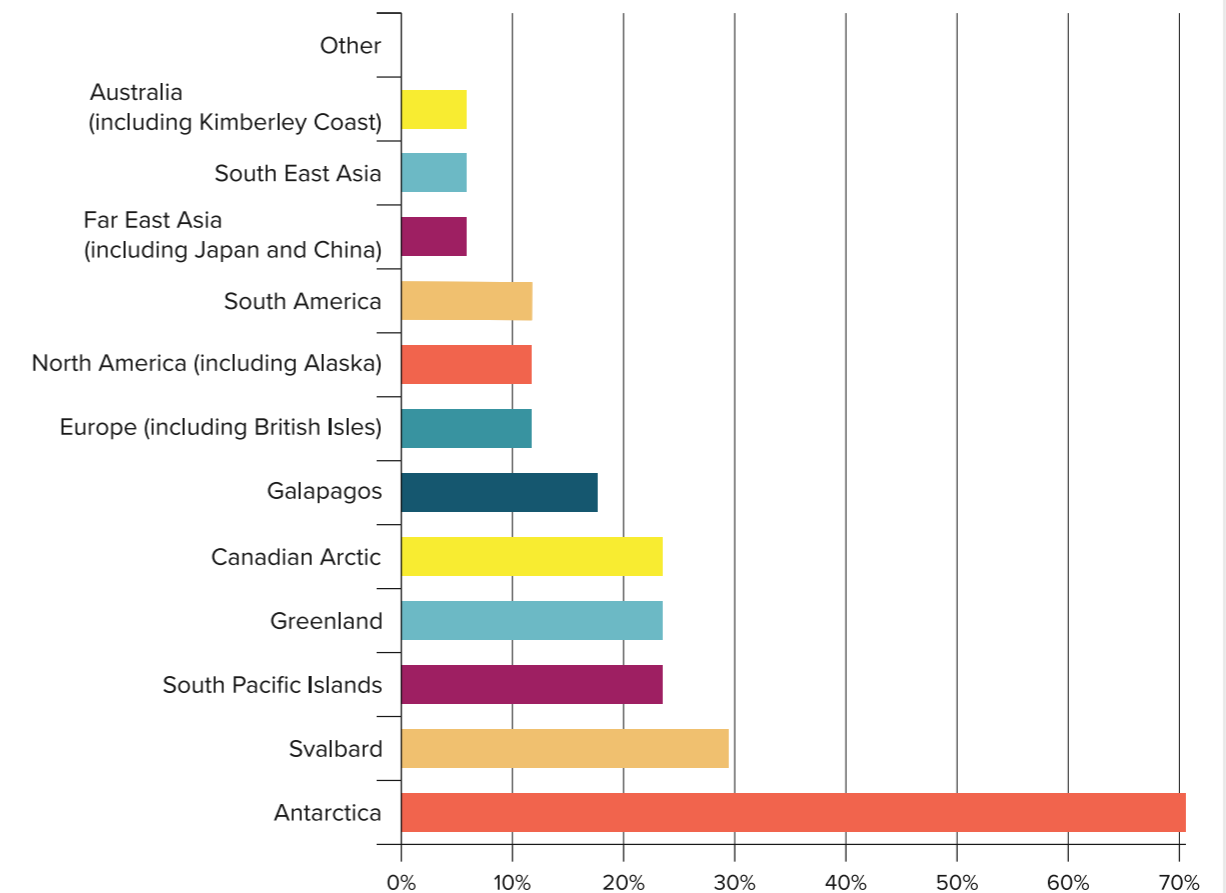
Antarctica, with its remoteness, no permanent human population, otherworldly landscapes, dramatic history and unique wildlife elicits the sense of the ultimate adventure. This is why it so sparks the imagination in consumers, continues to attract modern day explorers, and remains the top destination for expedition cruising, while still being at the ends of the earth.

On the other side of the world the Arctic, covering Greenland, Svalbard and the Canadian Arctic boasts equally dramatic landscapes and icebergs but is home to very different wildlife including polar bears and arctic foxes.

But not all ECN members offer polar product, and the Galapagos with its 19 main islands and its rich biodiversity has long been a warmer wildlife favourite with plenty of variety to explore.

But with much of the world's waters still unchartered, there are always new options for expedition cruise companies to explore. Travel agents are keen to see more Africa, Asia and South America on itineraries, but destinations such as the Kimberlys in Australia, Papua New Guinea and West Africa already feature.

**2024 Destination Expected Growth**





# FUTURE OF EXPEDITION CRUISE



**Martin Johnson, Chair of ECN says:**

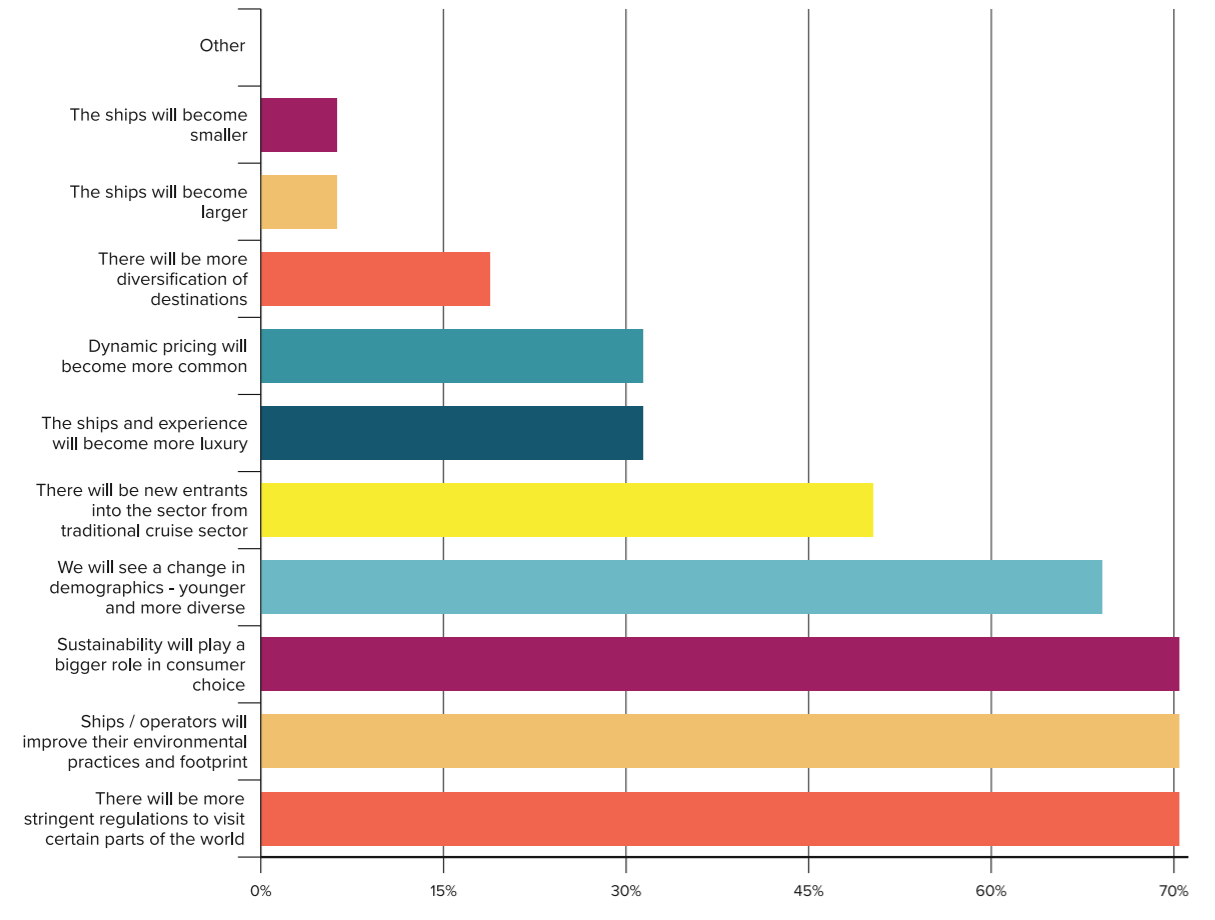
Expedition Cruising is trending right now, but almost half of travel agents sell little or no expedition cruise product but want to start or sell more (49%). The onus is on us to help them get the knowledge and tools they need to help them do this. With our new training hub, we can already help.

**Expedition Cruising is trending right now, but although they want to, almost half of travel agents don't sell it or sell very little (49%).**

With expedition cruising becoming more popular, it is not surprising that a prediction from our expedition cruise members is that the age demographic will shift. But now even within expedition cruising, the type of experience you choose can be quite diverse. Customers can choose how active they want to be. Traditionally expedition cruising was quite physically challenging – with trips out on zodiacs, rough seas, kayaking and hiking all part of the experience. Expedition cruise ships were originally re-purposed Russian ships or ferries but now new to market ships can be high-spec, high tech, ultra-luxury vessels that are more efficient and are specially designed for all their customer needs in mind, not just designed for tough conditions.

As well as diversified product, new destinations will come into play as discussed previously, but with sustainability concerns, come concerns about restrictions on regulations on visiting environmentally sensitive destinations, which could mean that rapid growth plateaus to meet sustainability targets.

Key Trends for Next Five Years



94%

of expedition cruise operator members expect business to grow in 2024

33%

of expedition cruise operator members forecast growth of 20% or more



Image courtesy of Seabourn

Market oversaturation and overcapacity

65%

of expedition cruise operator members believe that market oversaturation and overcapacity are the biggest threats to expedition cruising

Despite predicted sector growth, a chief concern is market oversaturation with **65% of expedition cruise operator members naming it as a key threat**. As the sector grows in appeal, more traditional operators and competitors are entering the sector, leading to increased competition.

Conversely, matching capacity with demand is also a key concern with **65% also naming overcapacity as a threat**. While the average size of expedition ships is much smaller than traditional crafts. Longer itineraries and high unit costs, it is important for smaller expedition cruise operators to keep the product offer in line with consumer demand.

Other key threats include **destinations becoming less accessible due to more stringent regulations (47%)** and an increase in running costs (**41%**). Fuel prices, which impact the entire travel industry are still an ongoing concern for the expedition cruise sector.

Other key threats

65%

Overcapacity

47%

Regulations

41%

Fuel Prices

Future Trends

65%

of the expedition cruise operator members believe that there will be a change in demographics amongst clients with a younger and more diverse clientele

46%

of expedition cruise operator members forecast new clients from the traditional cruise sector

Sixty-five per cent of the expedition cruise operator members believe that there will be a change in demographics amongst clients with a younger and more diverse clientele coming through to enjoy the unique experiences, whilst 46% predict more new entrants into the sector from the traditional cruise sector. Both will occur as a result of the expected growth in the market, reaching wider audiences and attracting more competition.



## Sustainability is the major expedition cruise trend for the next five years

71%

of expedition cruise operator members think that sustainability will play a big role in consumer choice

The three biggest trends expedition cruise operator members named however, all relate to sustainability. 71% per cent of expedition cruise operators say sustainability will play a bigger role in consumer choice, with 71% also believing that ships and expedition cruise operators need to improve their environmental practises and footprint, and the same number predicting more

stringent regulations to visit certain parts of the world. Expedition cruise operators also recognise that the sector must keep up with the wider travel industry when it comes to sustainability efforts to stay competitive for the consumer.

The full data of expedition cruise trends over the next five years is below.

### Sustainability

83%

of expedition cruise operator members have a sustainability charter

71%

measure their greenhouse gas emissions

41%

choose to publicly share them



Expedition cruise operators value sustainability credentials but improvements need to be made. **Four out of five expedition cruise operators have a sustainability charter (83%), and 71% measure their greenhouse gas emissions. Despite 71% measuring emissions, only 41% choose to publicly share them.**

Communicating sustainability efforts and transparency is an essential part of the sustainable transformation which expedition cruise operator members are working towards.

### Sustainability

Akvile Marozaitė, CEO of ECN says:

Expedition cruising visits some of the wildest areas on earth and both seafarers and guests see nature in all its glory and vulnerability. As a result, they are some of the biggest environmental advocates.

As we have seen from our member survey, there is gap between measuring carbon emissions and publicly reporting them. In the coming years, public reporting will become increasingly important as we need to benchmark progress.

But it is good to see that the vast majority of expedition operator members have a sustainability charter, even though we all admit we have so much more to do.



Earlier in 2023 we reported that

- All ECN expedition cruise operator members report to have either significantly reduced or completely eliminated single use plastics;
- Although just a handful of expedition cruise operators claim to be carbon neutral right now, others, such as Ponant, aim to reduce carbon emissions by 30% by 2030; to become carbon neutral in 2040 and net zero in 2050.
- Latin Trails said that they hold a protected rainforest reserve in the Amazon to achieve carbon neutrality
- Over 90% of ECN expedition cruise operators work with citizen science projects and charities
- Polar Latitudes will partner with the non-profit Oceanites on seven voyages throughout '23-'24 season. Oceanites has been recording penguin populations in Antarctica for 30 years and is the world's only publicly supported research programme monitoring the impacts of a warmed Antarctic Peninsula
- In 2023/24 season, Intrepid will host Avian Influenza scientists from the Antarctic Wildlife Health Network onboard its ship Ocean Endeavour to research the effects of Avian Influenza in order to establish the best way to manage the disease.

## Sustainability (contd.)

- HX Hurtigruten Expeditions is continuing to push up industry standards with initiatives ranging from banning heavy fuel oil and single use plastic, to using biofuels. In February 2022, Hurtigruten became the world's first cruise ship operator to issue a green bond by successfully completing the issuance of a new, green, senior unsecured bond issue of €50 million and as part of a major effort to make Hurtigruten Norway's fleet more sustainable, the company has invested nearly €100 million towards green upgrades which will continue to be implemented across the fleet in 2023 and finished in 2024. This is Europe's largest environmental upgrade. This will cut fuel usage and CO2 emissions by up to 25% and NOx emissions by 80%.
- Ponant has announced that it will launch a zero impact newbuild ship, which will assess all the potential impacts:
- All Hapag-Lloyd Cruises vessels possess state-of-the-art seawater desalination systems for drinking water production and four out of the five ships in the fleet use cleaner, shore power.
- In May 2023, Swan Hellenic announced a partnership with leading ocean foundations to support an EU Mission to restore marine biodiversity and reduce emissions at sea.
- Silversea has become the first tour operator to gain certification in environmental management in the Galapagos Islands, Ecuador and has become the first operator to divert all waste from landfill disposal in the Galapagos.



**Thank you for your interest in the expedition cruise industry.**

Travel trade and journalists can join the Expedition Cruise Network, free of charge, see further details on the member section of [expeditioncruisenet.com](https://expeditioncruisenet.com)

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