

## **The River has its way: A perlustration of river and small ship cruising in the Great Lakes Region and Midwestern United States**

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### **Abstract**

As the travel industry emerges from the COVID-19 pandemic, the river and small ship cruise industry is seeing strong consumer demand with bookings up 25% over pre-pandemic levels. New competitors offering new itineraries, coupled with experienced and well-regarded competition offering newly-designed ships, is helping to expand consumer options and interest. Concurrently, many consumers are showing a preference of traveling close to home to explore places they are familiar with but have never visited. This manuscript provides an overview of river and small ship cruise activity in the Midwestern United States and Great Lakes region. Existing cruise options in each market are identified. Waterways offering possible growth potential in these geographic markets are explored.

Finally, some of the marketing strategy and operational challenges of the industry are discussed.

**Key terms:** river cruises; small ship cruises; leisure cruise industry.

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## **Introduction**

River travel is nothing new in the United States as folklore runs deep with images of Mark Twain watching Paddlewheel ships on the Mississippi River from his perch in the Northeast Missouri town of Hannibal. A river has its way, indeed. Small passenger ships would pass freight barges on the Ohio River leaving Pittsburgh, PA for destinations down the Ohio River. Further, some areas of the Great Lakes were only reachable via ships before the introduction of a vast highway system. Long before ocean cruises grew in popularity, passengers traversed the Great Lakes. Marine historian Harry Wolf once noted, “at one time there were more people asleep on boats on the Great Lakes than on any other ocean of the world” (The Cruise People, 2011).

Viking is a global leader in river cruises and small ship expedition cruising. Viking operates over 60 specially-designed river ships cruising across Europe, Asia, and Africa (Wood, 2021). In May 2022, the company entered the Great Lakes cruise market with the introduction of the *Viking Octantis*, a 655-foot vessel that is the largest cruise ship to sail the Great Lakes and to dock at its home port of Milwaukee, WI. This expedition ship will split time between Antarctic expedition cruises and the Great Lakes region (Lewis, 2022). A companion ship, the *Viking Polaris*, will be introduced in 2023 (Zelinski, 2022). Here is how Viking described the ship (Viking Octantis, 2022):

*‘First, we invented modern river cruising. Then, we redefined ocean cruising. Now, experience all the comfort and elegance of our award-winning fleet with an expedition ship built specifically to explore the world’s most remote destinations and allow you to immerse yourself in these regions.’*

The introduction of the global leader Viking to the United States river cruise and Great Lakes markets highlights the attractiveness and growth potential of the United States river and small ship/expedition cruise markets. Torstein Hagen, Chairman of Viking, described the reception his company has received with their new ship and Great Lakes cruises this way, ‘*This region has been historically underserved by cruise lines, and we are delighted by the warm and enthusiastic reception we have received from the local communities*’ (Mayntz, 2022).

The purpose of this manuscript is to provide an overview of U.S. river and small ship cruises with a focus on the geographic markets and waterways of the Midwestern United States and the Great Lakes region. First, an overview of river cruising is offered, including a comparison to larger vessel ocean cruising. Second, the current state of the United States river and small ship/expedition cruise industry is provided. Third, a listing of current (and announced) river and small ship cruises in the Great Lakes region and Midwestern United States is presented. Some possible growth markets are offered for consideration as new ship designs make some waterways more navigable. Finally, some of the marketing strategy and operational challenges of the cruise industry are addressed.

## **An Overview of the River Cruise Industry and Experience**

Scholarly research does not provide a formal definition of a river cruise. Broadly put, a river cruise is a multi-day voyage taken for leisure purposes on a river vessel along navigable rivers or

inland waterways where passengers spend the night on the vessel (von Balen et al., 2014). The vessels may also pass through connected lakes and rivers, including seacoasts if the waterways are connected (Bosnic & Gasic, 2019). As such, day trips on the Chicago River and Lake Michigan (such as Mercury Cruises in Chicago, IL) or the Mississippi River (such as the Gateway Arch Riverboats in St. Louis, MO) are not included in this category.

The river cruise industry is heavily concentrated in Europe, which serves approximately 90% of river cruise passengers. The majority of these cruises are on the Danube and Rhine rivers and their tributaries. In 2018, there were 1.64 million river cruise passengers in the European Union compared to 7.8 million ocean cruise passengers (or, the river cruise markets are about 20% the size of the ocean cruise market) (Tomej & Lund-Durlacher, 2020). Steinbach (1995) notes that European countries offer extensive networks of navigable waterways traversing through historic towns with castles, wineries, and monasteries located along the waterways. Dimitrov and Stankova (2019) found that attractive tourist destinations tend to make river cruises from those locations more appealing to consumers, which further increases the appeal of that destination city. River cruise companies use this dynamic to their advantage by proving a day-before-the-cruise excursion in the home port city. In essence, river cruisers leaving St. Louis, MO get to see that city before departing on their cruise.

A river cruise vacation (as well as a Great Lakes cruise vacation) allows the traveler to unpack just once for their vacation and to never change hotels rooms. Multiple countries can be visited in one trip, such as Great Lakes cruises that visit both US and Canadian port cities. Passengers travel on smaller vessels, with 100-400 passenger capacities, to smaller destinations which allows for a deeper engagement with the way of life for the locals. With fewer passengers aboard, cruisers can make more personal connections with their fellow passengers and the ship's staff.

River cruises are typically offered as all-inclusive vacations that combine staterooms, meals (and alcohol), guest lectures and enrichment programs, entertainment, and most shore excursions for one price. Many cruises include a pre-cruise hotel stay and transfers to the ship. The pace is casual as is the dress code. Shore excursions tend to be cultural or educational (history, military history, national parks, etc.). Passengers seeking the above travel experience can avoid flying overseas (spending both money and time) to begin their cruise vacations (section relies heavily on Zable, 2022). Hines (2021) noted that many cruise passengers find the small ships, with fewer passengers, preferable to the larger ocean ships while cruising during the COVID era. **Table 1** provides a broad comparison between the smaller ship river and coastal waterway cruises and larger-ship ocean cruises.

**(Insert Table 1 Here)**

### **The Current State of the North American River and Small Ship Cruise Industry**

There are currently 14 cruise lines offering river and small ship cruises in the United States and the Great Lakes region. These firms vary in the size of their fleets, variety of cruises offered, and variety of markets served. There are 11 distinct geographic clusters of waterways in the United States and Canada: (1) Lower Mississippi River; (2) American Heartland and Tributaries to the Mississippi River; (3) Upper Mississippi River; (4) Great Lakes Region (including Saint Lawrence Seaway); (5) New England Coast and Canadian Maritimes; (6) Mid-Atlantic Coast; (7) South Atlantic Coast; (8) Pacific Northwest – Puget Sound; (9) Pacific Northwest – Snake & Columbia Rivers; (10) California Coast; and (11) Alaska & British Columbia Coast. Some

cruises combined these clusters in one trip, such as Viking's *Great River Cruise* – a 15-day trip on the Mississippi River between New Orleans, LA and St. Paul, MN.

Given the focus of this manuscript on the markets and waterways of the Great Lakes region and Midwestern United States, the focus here will be on three markets: (1) Upper Mississippi River; (2) American Heartland and Tributaries to the Mississippi River; and (3) Great Lakes region. **Table 2** shows the major cruise providers in each market. The reader will note that two cruise lines (American Queen Voyages and Viking) have a presence in all three markets while one cruise line (American Cruise Lines) competes in two of these three markets. American Cruise Lines started sailing in 2000 while the American Queen Steamboat Company (now known as American Queen Voyages), started sailing in 2012 (Sampson, 2020). Both have seen accelerated growth in recent years. Viking entered both the Mississippi River and Great Lakes markets in Summer 2022.

**(Insert Table 2 Here)**

### **River Cruise Passenger Profile**

Approximately 80% of river cruise passengers are Baby Boomers (i.e., those born between 1946-1964) with the remaining 20% typically being people in their 50's attracted to the addition of yoga rooms, gyms and unique gathering areas to modern riverboats. These target markets are active travelers with the time and money needed to explore the Canadian and United States waterways at the slower pace of the riverboat (Sampson, 2020). Similarly, Great Lakes cruises tend to serve Baby Boomer consumers. Chris Gray Faust, the managing editor of *Cruise Critic*, a cruise ship review site, noted that Great Lakes cruises were already gaining in popularity before the COVID-19 pandemic. After the pandemic, their attractiveness continued to grow. Gray Faust noted, '... *they (consumers) looked for places close to home, maybe places they hadn't been. It made sense that cruising would evolve on the Great Lakes*' (Goodman & Turner, 2022).

The river cruise industry, as well as the Great Lakes cruise industry, tends to follow a one-port-per-day model, with ports typically visited in the daylight hours for a specific amount of time. Some researchers have noted that this model may need to be modified in the future as the next generation of consumers (i.e., Generation X) reports a preference for a less structured cruise experience with docking times expanded and overnights stays in select ports to allow more interaction with the local community (Cooper et al, 2019).

### **Riverboat and Small Ship Cruise in-Port Passenger Spending**

River cruises often include a home port excursion the day before the cruise embarks on its waterway journey. It is expected that over 80% of cruise visitors to Alton, Illinois (across the Mississippi River from St. Louis, MO) will spend an additional day in town, thus adding to their total economic impact (*The Edwardsville Intelligencer*, 2019). Research conducted by the port of Duluth, MN found that, on average, cruise passengers spend \$111 per day while the ship is in port while the ship's crew members spend \$49 per day. For those passengers arriving at the home port to begin their cruise, these passengers spend \$180 in that city (University of Minnesota Duluth, 2021).

The port of Cleveland estimates each Great Lakes cruise passenger will spend \$150 per day during their port visits to their city. In 2022, Cleveland expects to welcome 36 cruise ships with each vessel carrying 200-400 passengers. Local Cleveland tourism officials recognize the importance of this visitor spending. However, they are attracted to the larger impact of positioning Cleveland as a tourist destination and the larger impact of this effort (Goodman & Turner, 2022).

## **Current Cruises Offerings in the Midwestern United States and Great Lakes Region**

### ***Upper Mississippi River***

The region of the Mississippi River running from St. Louis, MO / Alton, IL to Minneapolis/St. Paul, MN is often referred to as the “Upper Mississippi.” Cruises in this area tend to be offered between June and October. Here, cruise operators can assign their largest ships, including the *Viking Mississippi* (386 passengers) and American Queen Voyage’s *American Queen* (436 passengers, the largest steamboat ever built). Here is a list of the most common port stops in this region across all operators:

- Hannibal, MO
- Burlington, IA
- Quad Cities (Bettendorf and Davenport, IA)
- Dubuque, IA
- LaCrosse, WI
- Winona, MN
- Red Wing, MN

**Table 3** provides a look at the itineraries available to river cruise travelers.

**(Insert Table 3 Here)**

### ***American Heartland and Tributaries to the Mississippi River***

The portion of the Mississippi River running from Memphis, TN to St. Louis, MO (or across the river to Alton, IL) can be considered the Mid-Mississippi River area or “American Heartland” with the tributary waterways of the Ohio, Cumberland, and Tennessee Rivers emptying into the Mississippi River in this region. Cruise operators can connect the following larger cities: Pittsburgh, PA; Louisville, KY; St. Louis, MO; Nashville, TN, Chattanooga, TN, and Memphis, TN. One operator (American Cruise Lines) connects suburban Chicago (via Ottawa, IL) and St. Louis, MO. Cruises in this area tend to be offered between May and October. Here is a list of the most common port stops in this region across all operators:

- New Madrid, MO
- Cape Girardeau, MO
- St. Louis, MO
- Paducah, KY
- Savannah, TN
- Dover, TN
- Clarksville, TN
- Nashville, TN
- Florence, AL
- Decatur, AL
- Chattanooga, TN
- Pittsburgh, PA
- Marietta, OH
- Maysville, KY
- Cincinnati, OH
- Louisville, KY
- Henderson, KY

**Table 4** provides a look at the itineraries available to river cruise travelers.

(Insert Table 4 Here)

### ***Great Lakes Region***

Unlike the river cruises profiled in the previous two sections, Great Lakes cruises are often referred to as small ship cruises or expedition cruises. The five Great Lakes - Superior, Michigan, Huron, Erie and Ontario – constitute the largest fresh water system in the world. The Great Lakes waterways run over 750 miles from east to west and contain 20% of the world's fresh water supply (Michigan Economic Development Corporation, 2022). To travel this entire distance, ships must traverse rivers that connect the Great Lakes (such as the St. Mary's River connecting Lake Superior and Lake Huron), lock systems that address the changes in elevation (such as the SOO locks in Sault Saint Marie, Michigan), and canals (such as the Welland Canal, a 27-mile canal that connects Lake Ontario and Lake Erie) (American Great Lakes Port Association, 2022). In May 2022, during its maiden voyage on the Great Lakes, the *Viking Octantis* became the largest passenger ship to ever pass through the Welland Canal. The ship had 11 inches of total clearance, or less than 6 inches on either side of the vessel (Mayntz, 2022).

Cruises on the Great Lakes were suspended in 2020 and 2021 due to the global pandemic. Pent-up consumer demand, along with the availability of new ships and cruise itineraries, has led to cruise bookings exceeding 2019 pre-pandemic levels (Schmidt, 2022). In 2022, cruise passengers will make approximately 150,000 passenger visits to Great Lakes ports, up 25% from 2019. Nine ships will combine to produce an economic impact over \$120 million in the Great Lakes region (Cruise the Great Lakes, 2022). Depending on the itinerary and type of room booked, cruise prices can range from \$5,000 to \$20,000 per person (Falinski, 2022). Here is a list of the most common port stops in this region across all operators:

- Duluth, MN
- Thunder Bay, ONT
- Sault Saint Marie, MI
- Mackinac Island, MI
- Alpena, MI
- Frazier Bay, ONT
- Killarney, ONT
- Parry Sound, ONT
- Windsor, ONT
- Cleveland, OH
- Niagara Falls, ONT
- Toronto, ONT
- Milwaukee, WI
- Chicago, IL
- Holland, MI
- Muskegon, MI

**Table 5** provides a look at the itineraries available to Great Lakes cruise travelers.

(Insert Table 5 Here)

### **Untapped Markets - The Tributaries of the Mississippi River**

At the time of this writing, cruise lines are working with ship manufacturers to bring forward updated ship designs that will allow the development of new river cruise experiences by allowing access to waterways that cannot be sailed with existing ships. For example, one river cruise specialist (American Cruise Lines) has plans to introduce up to twelve catamaran-style twin-hull river boats over the next several years. The design allows the vessel to cruise in more shallow river waters as well as ocean coastal waterways, particularly those incorporating the waters of the Intracoastal Waterway System that runs primarily along the Atlantic Coast and Gulf of Mexico (Jainchill, 2022).

### ***The Missouri River***

The Mississippi River is the second longest river in North America. The “Great River” contains approximately 40% of the United States land mass in its watershed (National Parks Service, 2022). The longest river in the United States is the Missouri River, one of the tributaries to the Mississippi River. The Missouri River runs from Bozeman, MT to St. Louis, MO (American Rivers, 2022). Today, the Missouri River is the largest tributary to the Mississippi that does not offer cruise excursions. There are currently three cruise lines that provide local day trips on the Missouri River (Thomas, 2017): (1) Missouri Breaks River Company in Great Falls, MT; (2) Lewis and Clark Riverboat Cruises in Bismarck, ND; and (3) River City Star’s Riverboat Cruises in Omaha, NE.

The U. S. Army Corps of Engineers has constructed six dams along the Missouri River with dams located in Montana, North Dakota and South Dakota. None of these six dams have lock systems to allow ships to traverse around them (North Dakota Water Resources, 2022). The larger cities (and possible ports of call) on the Missouri River, but below the up-river dam system, include:

- Sioux City, IA
- Omaha, NE
- Kansas City, MO
- St. Joseph, MO
- St. Louis, MO

The Army Corps of Engineers works to ensure this section of the Missouri River is a navigable waterway (Hogan, 2016). New ship technology may allow cruise operators to explore multi-day cruises along this section of the Missouri River while working with the above cities as possible ports of call.

### ***The Arkansas River***

Another Mississippi River tributary that does not currently offer cruise excursions is the Arkansas River. The *Arkansas Queen* previously provided day-trip cruises on the Arkansas River in Little Rock, AR but has ceased operations (Sandlin, 2015). The U. S. Army Corps of Engineers has constructed six dams along the Arkansas River. However, a series of locks allows continuous navigation along the McClellan-Kerr Arkansas River Navigation System (MKARNS), a 445-mile stretch of the Arkansas River that runs from Tulsa, OK (along the Verdigris River which feeds into the Arkansas River) to the Mississippi River (U. S. Army Corps of Engineers, 2022). The larger cities (and possible ports of call) along the MKARNS waterway and below the up-river dams include:

- Tulsa, OK
- Muskogee, OK
- Fort Smith, AR

- Little Rock, AR
- Pine Bluff, AR

A challenge for developing cruise activity on the Arkansas River is the lack of a larger city for use as the embarkation (departure) or disembarkation (arrival) port. Memphis, TN is over 100 miles north of the point where the Arkansas River drains into the Mississippi River. Cruise operators may find it necessary to develop itineraries that include both the Mississippi River (via Memphis, TN) and the Arkansas River to attract cruise passengers and to provide access to air services to bring passengers to their departure/arrival home port.

### **Marketing Strategy and Operational Challenges**

Like all industries, the river cruise and small ship cruise industry has its unique operational challenges. What the industry does not have, however, is a rich literature base of published empirical studies to draw upon. In the space below, some of the marketing strategy and operational challenges of the industry are presented. This list concurrently serves as a preliminary research agenda to encourage others to engage in research that can help inform decision-makers in this growing industry.

### **Expanding the Market for River and Great Lakes Cruises**

When evaluating a target market, marketers can qualify a targeted market using the MAD approach: (1) do consumers have the MONEY to support the purchase?; (2) do consumers have the AUTHORITY to make the decision?; and (3) do consumers have the DESIRE for the product? (see Grewal & Levy, 2023). In recent years, Baby Boomer consumers have been the majority of river cruise and small ship cruise passengers. They are active consumers with the time and money available to explore places that are interesting to them. In a post-pandemic period, they also seem more interested in exploring places closer to home that are familiar to them (Goodman & Turner, 2022). River cruises and Great Lakes cruises are an attractive option for many of these consumers.

The operational challenge for the industry has always been to find ways to expand beyond their traditional consumer group (i.e., older consumers) and to design itineraries that can serve both audiences simultaneously. It must be noted that river and small cruise ships do not offer the wide array of entertainment venues that ocean cruise ships provide (Woodruff, D & Woodruff, 2022). This ship design feature can limit simultaneous programming to vastly different audiences (say, Boomers and Generation Z - those born between 1997-2009). To continue to expand the market for river cruises beyond its primary Baby Boomer market, cruise operators are currently focused on family travel, small group travel (such as girlfriend's get-away cruises) and passenger willingness to spend more on upper-level cabins. In the post COVID-19 market, many consumers are attracted to the smaller ships cruising closer to home and the desire to reconnect with family and friends (Edenedo, 2022).

Research conducted in 2021 by Tripadvisor and Accenture found that higher-income millennials were more interested in cruising than ever before, with more than half of these respondents planning to take a cruise vacation for their next leisure trip (Edenedo & Zelinski, 2022). Data from the Cruise Lines International Association (CLIA) 2020 Global Market Report confirm that consumers over age 60 (i.e., Baby Boomers) are still their largest consumer group



with passengers between ages 20 and 39 making up 20% of cruise passengers. Further, Millennials have a positive attitude toward cruises, with 85% of Millennial cruisers reporting they would cruise again (Edenedo & Zelinski, 2022).

As previously noted, the river cruise industry, as well as the Great Lakes cruise industry, tends to follow a one-port-per-day model, with ports typically visited in the daylight hours for a specific amount of time. The reader will note most itineraries listed in **Tables 3, 4, and 5** are for 8-10 days, and often longer. Some researchers have noted that this model may need to be modified in the future as the next generation of consumers (i.e., Generation X) reports a preference for a less structured cruise experience with docking times expanded and overnights stays in select ports to allow more interaction with the local community (Cooper et al, 2019). One can imagine a 4- or 5-night cruise between Chicago, IL and Windsor, ONT or a similar trip from Chicago, IL to Duluth, MN with stops in Mackinac Island, MI and Thunder Bay, ONT.

### **Ship Deployment in High Fixed Cost Industry**

The cruise industry is very capital-intensive and requires a significant investment to introduce and update a fleet of ships (Cooper, 2014). It can take 12-18 months for a cruise ship to be built (Ma, 2022). As an illustration, Viking did note in a 2015 press release they intended to invest \$90 to \$100 million for each new river ship (Magill, 2022). Cruise operators strive to keep ships busy serving passengers and covering their high fixed costs of operation. As previously noted, the *Viking Octantis* entered service in the Great Lakes cruise market in May 2022. Prior to that, the ship provided expedition cruises to Antarctica and other southern hemisphere cruises (Cruisemapper.com, 2022).

- 44-day "From the Arctic to Antarctica" (from Tromso, Norway to Ushuaia, Argentina)
- 19-day "Antarctic and South America Discovery" (from Buenos Aires, Argentina to Rio de Janeiro, Brazil)
- 18-day "South America and Antarctic Discovery" (from Rio de Janeiro, Brazil to Ushuaia, Argentina)
- 15-day and 13-day "Antarctic Adventure" (from Buenos Aires, Argentina to Ushuaia, Argentina)
- 15-day "Atlantic and Equator Sojourn" (from Cork, Ireland to Rio de Janeiro, Brazil)
- 13-day "Arctic Adventure" (roundtrip from Tromso, Norway)
- 13-day "Viking's Northern Isles" (from Tromso, Norway to Cork, Ireland)
- 10-day "Caribbean Connections" (from Bridgetown, Barbados to New York City, NY)

The planned 2023 cruise calendar for the Ocean Voyager, operated by American Queen Voyages, is provided in **Table 6**. This data provides another good example of the operational challenge of managing weather, passenger loads, and consumer demand to maintain full deployment of a cruise ship (an expensive asset in a high fixed cost industry). The reader will note the ship will operate in the South Atlantic, New England and Canadian Maritime Islands, and Great Lakes markets in 2023 (American Queen Voyages, 2022).

**(Insert Table 6 Here)**

### **Staffing Challenges**

The COVID-19 pandemic forced widespread cancellation of river and ocean cruises for 2020 and much of 2021. The cruise industry relies on a global workforce that works on a series of time-limited contracts. When ships are not cruising, cruise employees are not working. Currently, it is estimated that 40% of cruise employees have not returned to the water. In

response to this staffing shortage, some cruise lines have cancelled cruises or limited their number of passengers. Additionally, some cruise lines have limited dining and/or entertainment options on cruises giving staffing shortages (McGillivray, 2022). Over time, the cruise industry must continue to identify, train, and retain cruise ship employees to ensure passengers received their desired level of service while on-board.

### **Impact of Climate Change on Waterways**

As previously noted, the river cruise industry is largely concentrated in Europe. That market has been experiencing a drought in Summer 2022. In fact, over 60% of the land mass in Europe and the United Kingdom experienced drought warnings or alerts (Buckley, 2022). There is a paradox facing cruise operators: at a time when demand for cruises is growing, the rivers that allow cruise lines to supply these desired cruises can be threatened by changed in the climate. While the Mississippi River and Great Lakes region may be less vulnerable to climatic impact, cruise lines must monitor this development and prepare accordingly. This could include an increase in demand for services along the Mississippi River and Tributaries as well as the Great Lakes.

### **Impact of Currency Fluctuations**

To aid passenger planning, cruise lines typically announce their cruise itineraries and dates one or two years in advance. With cruises serving both the United States and Canada, the influence of currency fluctuations on consumer decision-making must be considered. From January 2022 to January 2023, the exchange rate between the U.S. Dollar (USD) and the Canadian Dollar (CAD) fluctuated between \$1.24 USD-CAD to \$1.39 USD-CAD. That is, in January 2022, \$1.00 USD was worth \$1.24 CAD. During the year, \$1.00 USD was worth up to \$1.39 CAD, which is a 12% change in currency values, and now sits at \$1.34 (barchart.com, 2023). Due the changes in exchange rates, the U.S. Dollar provides more local purchasing power in Canada. This makes it less expensive for Americans to travel to Canada and/or buy Canadian goods. However, it makes it more expensive for Canadians to travel to the United States or buy U.S. goods. With passengers from both countries considering cruise travel in the region, cruise ship executives must monitor currency exchange rates to predict their impact on the purchasing patterns of their possible consumers.

### **Benefits of this Research Stream**

There are many stakeholders that can benefit from an increased focus on river cruising in the Midwestern/Great Lakes areas. Cities along waterways that could be potential new ports of call need to examine the potential benefits of becoming a port of call or start/end points in a journey. Local employment opportunities, tourist dollars being spent, tax revenue being generated are just some of the issues to be carefully examined. The cruise industry will benefit from further research into generational differences which could impact itineraries, cruise lengths, and port of call stay lengths. From a marketing standpoint, both product and place might need to be adjusted here. Promotion and price would follow suit. The cruise lines could also push for partnerships with ports of call to possibly secure tax benefits. Cruises provide tourists dollars, staff dollars in port, fuel and provisions bought at local ports, and employment opportunities for local workers. Joint efforts by both the cruise industry and land-based state and local governments would be seen to benefit both parties in many ways, all while giving cruise purchasers even more close to home itinerary options.

### **COVID Post Script and Concluding Remarks**

The U.S. river and Great Lakes cruise industries are emerging from the COVID-19 global pandemic with cruise bookings approximately 25% of the pre-pandemic levels of 2019. Many consumers are finding these cruises to be appealing alternatives to global travel to cruise the rivers of Europe or the oceans of the Caribbean and Atlantic. The desire to explore familiar destinations that are close-to-home but not previously visited is a positive outcome for the river and small ship cruise industry. Furthermore, many cruise passengers find the small ships, with fewer passengers, preferable to the larger ocean ships with what they believe to be higher risk factors for virus transmission.

The industry continues to work to expand its consumer base beyond its traditionally-older Baby Boomer audience. New ships, new itineraries, and new types of shore excursions are aiding in the desire to expand passenger levels. The cruise industry must continue to address operational matters such as ship deployment, crew member staffing, passenger safety, health and safety protocols, and other matters as they seek to continue the wave of momentum present in the post-pandemic environment.

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**Table 1: A Comparison of River and Ocean Cruises**

	<b>River and Small Ships</b>	<b>Ocean Ships</b>
Port location	Often in center of city	Often in outskirts of city
Ship length	300-400 feet	1,000 feet or more
Number of decks	4-6	10-16
Number of passengers	100 - 400	2,500-5,000
Boarding process	Less cumbersome	More cumbersome
Cost	More expensive per day	Less expensive per day
Meals	Included	Included
Alcohol	Included	Additional Charge
Port Cities	Smaller communities	Larger cities
Cabins	Fewer options	More options
Number of restaurants	1-2	10 or more
Number of bars	1-2	Many more
Entertainment options	Fewer	Many more
Health spa	Not common, can get services in port cities	Commonly available
Casino gambling	Not available	Commonly available
Motion sickness	Less likely to occur	More likely to occur
On-land excursions	Included	Additional charge
Passenger age	Tend to be older	Tend to be younger
On-land scenery	More interesting	Less interesting
On-board shopping	Limited	Prevalent

Source: Draws heavily from Woodruff and Woodruff (2022).

**Table 2: Representation in Each Market by Carrier**

<b>Region</b>	<b>Existing Cruise Providers</b>
American Heartland and Mississippi Tributaries	1. American Cruise Lines 2. American Queen Voyages 3. Viking River Cruises
Upper Mississippi	1. American Cruise Lines 2. American Queen Voyages 3. Viking River Cruises
Great Lakes Region	1. American Queen Voyages 2. Hapag-Lloyd Cruises 3. Pearl Seas Cruises 4. Plantours 5. Ponant Cruises

	6. Tauck
	7. Viking

Source: Original. Data taken from company websites.

**Table 3: Cruise Offerings on the Upper Mississippi River**

<b>Cruise Line</b>	<b>Cruise Name</b>	<b>Cruise Length</b> <b># of Passengers</b>	<b>Cruise Embark and Debarking Location</b>
American Cruise Lines	Upper Mississippi River Cruise	8-day / 7-night 180 Passengers	St. Louis, MO to St. Paul, MN ( <b>and reverse</b> )
American Queen Voyages	St. Louis to Minneapolis	9-day / 8-nights 436 Passengers	St. Louis, MO to Minneapolis, MN ( <b>and reverse</b> )
Viking	America's Heartland	8-day / 7-night 386 Passengers	St. Louis, MO to St. Paul, MN ( <b>and reverse</b> )

Source: Original. Data taken from company websites.

**Table 4: Cruise Offerings in American Heartland and Tributaries to the Mississippi River**

<b>Cruise Line</b>	<b>Cruise Name</b>	<b>Cruise Length</b> <b># of Passengers</b>	<b>Cruise Embark and Debarking Location</b>
American Cruise Lines	Ohio River Cruise	11 Days / 10 Nights 150 Passengers	Pittsburgh, PA to St. Louis, MO
American Cruise Lines	Music Cities Cruise	8 Days / 7 Nights 175-190 Passengers	Memphis, TN to Nashville, TN ( <b>and reverse</b> )
American Cruise Lines	Tennessee Rivers	8 Days / 7 Nights 175-185 Passengers	Nashville, TN to Chattanooga, TN ( <b>and reverse</b> )
American Queen Voyages	Pittsburgh to Louisville	9 Days / 8 Nights 436 Passengers	Pittsburgh, PA to Louisville, KY ( <b>and reverse</b> )
American Queen Voyages	Louisville to St. Louis	9 Days / 8 Nights 436 Passengers	Louisville, KY to St. Louis, MO
American Queen Voyages	Nashville to Chattanooga	9 Days / 8 Nights 436 Passengers	Nashville, TN to Chattanooga, TN
American Queen Voyages	Nashville to Memphis	9 Days / 8 Nights 436 Passengers	Nashville, TN to Memphis, TN



American Queen Voyages	Louisville to Nashville	9 Days / 8 Nights 166 Passengers	Louisville, KY to Nashville, TN
American Queen Voyages	Ottawa to St. Louis	9-Days / 8-Nights 245 Passengers	Ottawa, IL to St. Louis, MO

Source: Original. Data taken from company websites.

**Table 5: Cruise Offerings on the Great Lakes**

<b>Cruise Line</b>	<b>Cruise Name</b>	<b>Cruise Length # of Passengers</b>	<b>Cruise Embark and Debarking Location</b>
American Queen Voyages	Chicago to Niagara Falls	9-Days / 8-Days 202 Passengers	Chicago, IL to Niagara Falls, ONT
American Queen Voyages	Detroit to Montreal	11-Days / 10-Nights 202 Passengers	Detroit, MI to Montreal Qc ( <b>and reverse</b> )
Hapag-Lloyd Cruises	Great Lakes – The Sea in the Wilderness	11-Days / 10-Nights 230 Passengers	Toronto, ONT to Chicago, IL
Hapag-Lloyd Cruises	Great Lakes – Contrasts with Vast Lake Backdrops	13-Day / 12-Nights 230 Passengers	Chicago, IL to Windsor, ONT
Hapag-Lloyd Cruises	Great Lakes – The American Dream Amidst the Lakes	10-Days / 9-Nights 230 Passengers	Windsor, ONT to Chicago, IL
Hapag-Lloyd Cruises	Great Lakes – Masterpiece of Nature	14-Days / 13-Nights 230 Passengers	Chicago, IL to Toronto, ONT
Hapag-Lloyd Cruises	Great Lakes – Lakes Awash with the American Dream	11-Days / 10-Nights 230 Passengers	Toronto, ONT to Milwaukee, WI
Hapag-Lloyd Cruises	Great Lakes and the S. Lawrence River: A Confluence of Wilderness and History	18-Days / 17-Nights 230 Passengers	Milwaukee, WI and Halifax, NS
Hapag-Lloyd Cruises	Great Lakes – North America’s Scenic Shores	13-Days / 12-Nights 230 Passengers	Toronto, ONT to Milwaukee, WI
Hapag-Lloyd Cruises	Great Lakes – Masterpieces of Nature	13-Days / 12-Nights 230 Passengers	Milwaukee, WI to Toronto, ONT

<b>Cruise Line</b>	<b>Cruise Name</b>	<b>Cruise Length # of Passengers</b>	<b>Cruise Embark and Debarking Location</b>
Pearl Seas Cruises	7-Night Great Lakes and Georgian Bay	8-Days / 7-Nights 210 Passengers	Milwaukee, WI to Toronto, ONT
Pearl Seas Cruises	11-Night Great Lakes and Georgian Bay	12-Days / 11-Nights 210 Passenger	Toronto, ONT to Milwaukee, WI
Plantours	Indian Summer on the Great Lakes of North America	18-Days /17-Nights 420 Passengers	Montreal, Qc to Montreal, Qc
Ponant Cruises	Great Lakes of North America	8-Days / 7-Nights 184 Passengers	Milwaukee, WI to Toronto, ONT ( <b>and reverse</b> )
Tauck	Cruising the Great Lakes: Toronto to Chicago	12-Days / 11-Nights 184 Passengers	Toronto, ONT to Chicago, IL
Viking	Great Lakes Collection	15-Days / 14-Nights 378 Passengers	Toronto, ONT to Duluth, MN ( <b>and reverse</b> )
Viking	Niagara and the Great Lakes	8-Days / 7-Nights 378 Passengers	Toronto, ONT to Milwaukee, WI
Viking	Undiscovered Great Lakes	8-Days / 7-Nights 378 Passengers	Thunder Bay, ONT to Milwaukee, WI
Viking	Great Lakes Explorer	8-Days / 7-Nights 378 Passenger	Milwaukee, WI to Thunder Bay, ONT

Source: Original. Data taken from company websites.

**Table 6: Planned 2023 Deployment of the Ocean Voyager (American Queen Voyages)**

<b>Month</b>	<b>Itineraries (departure date)</b>
January	Roundtrip Amelia Island, FL (1-2)
February	Roundtrip Jacksonville, FL (2-16) Roundtrip Jacksonville, FL (2-26)
March	Roundtrip Jacksonville, FL (3-8) Roundtrip Jacksonville, FL (3-18) Roundtrip Jacksonville, FL (3-28)
April	Roundtrip Jacksonville, FL (4-9) Savannah, GA to Halifax, NS (4-19)
May	Portland, ME to Toronto, ONT (5-7)

	Toronto, ONT to Chicago, IL (5-17) Chicago, IL to Toronto, ONT (5-26)
June	Toronto, ONT to Chicago, IL (6-4) Chicago, IL to Toronto, ONT (6-13) Toronto, ONT to Chicago, IL (6-22)
July	Chicago, IL to Toronto, ONT (7-1) Toronto, ONT to Chicago, IL (7-10) Chicago, IL to Toronto, ONT (7-19) Toronto, ONT to Chicago, IL (7-28)
August	Chicago, IL to Toronto, ONT (8-6) Toronto, ONT to Chicago, IL (8-15) Chicago, IL to Toronto, ONT (8-24)
September	Toronto, ONT to Chicago, IL (9-2) Toronto, ONT to Chicago, IL (9-20) Chicago, IL to Montreal, QEB (9-29)
October	Boston, MA to Saint John, NB (10-19)
November	Boston to Nassau (11-2) Roundtrip Jacksonville (11-19) Roundtrip Jacksonville (11-29)
December	Roundtrip Jacksonville (12-9) Roundtrip Jacksonville (12-19) Roundtrip Jacksonville (12-30)

Source: American Queen Voyages (2022).