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A Review of River and Small Ship Cruising in the Mid-Atlantic, Northeastern United States, and Eastern Canadian Markets

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Abstract – Currently, there is a lack of cruise industry related articles in the tourism, business, and marketing literature. This manuscript provides an overview of river and small ship cruise activity in the Mid-Atlantic, Northeastern United States and Eastern Canada in three geographic clusters and waterways: (1) Mid-Atlantic Coast; (2) New England Coast and Canadian Maritimes; and (3) Eastern Canada & the Saint Lawrence Seaway. The existing cruise options in each market are identified. The operating characteristics of this region that aid and challenge cruise operators are then explored. Finally, the Product-Market Growth Matrix is used to present growth strategies available to cruise line operators as they seek to expand the reach of their industry following the COVID pandemic.

Key Words – river cruises, small ship cruises, cruise industry, cross-border travel

Relevance of Marketing Educators, Researchers, and/or Practitioners – Many consumers are familiar with ocean cruising and the topic has received much research attention. By contrast, small-ship or river cruising has received limited research attention, particularly in the United States and Canada. This manuscript presents an overview of the industry along with a model to plan for growth in the future.

Introduction

A consumer interested in a cruise vacation that explores the New England coast has many options. For example, Carnival Cruise Line offers itineraries ranging from 4-days to 14-days leaving from Norfolk, VA; Baltimore, MD, and New York, NY. A 4-day cruise leaves New York, travels to one port (Saint John, New Brunswick Canada) and returns to New York. The 8-day voyage from Norfolk includes stops in Maine and Nova Scotia. Conversely, a 14-day cruise from Baltimore includes 6 days at sea with port visits to two locations in Greenland and three locations in Canada (Newfoundland and Nova Scotia, Canada) (Carnival, 2022). Other large ship cruise lines (such as Royal Caribbean, Norwegian, Holland America, Princess Cruises, and others) also compete in this market.

Vacationers who choose a large cruise ship experience are attracted by the large list of options a larger ship can provide: more dining options; more entertainment options; more pools and spas; more activities; more children's programs; more alone time; and more flexibility to create a unique cruise experience just for you (Bogle, 2021). However, the 'cost' of having more

options includes longer treks to each activity, dining option, or entertainment venue, larger crowds to contend with, and the presence of many obstructed views of the ocean or waterway given the large ship cabin layouts.

Hines (2021) noted that many cruise passengers find the smaller ships with few passengers, including river cruises, to be preferable to the larger ocean ships while cruising during the COVID era. Smaller ships can access ports that cannot accommodate the larger ocean vessels. These smaller ships can take their passengers right into the center of a port city to provide a closer connection to the local culture. By operating closer to land, passengers can see the aesthetic beauty of the coastline, which is part of the draw of cruising areas such the New England coast and the Canadian Maritime provinces.

The purpose of this manuscript is to provide an overview of river and small ship cruises with a focus on the geographic markets and waterways of the mid-Atlantic, the northeastern United States and eastern Canada. First, an overview of river cruising is offered, including a comparison to larger vessel ocean cruising. Second, the current state of the United States and Canadian river and small ship/expedition cruise industry is provided. Third, a listing of current (and announced) river and small ship cruises in the northeastern United States and eastern Canada is presented. Finally, some of the operating characteristics of the region that may aid and/or challenge cruise operators are offered.

An Overview of the River/Small Ship 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 and Gasic, 2019). Therefore, excursions such as a day-trip on Boston Harbor or a 4-hour whale watching cruise from the Gloucester, MA area not included in this study.

Currently 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, river cruises are roughly about 20% the size of the ocean cruise market) (Tomej and 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. Cruises get the added benefit of visiting multiple countries (and experiencing multiple cultures) all in one itinerary.

A river or small ship cruise vacation allows the traveler to unpack just once for their vacation and to never change hotels rooms. They travel on smaller vessels with 100-400 passengers to smaller destinations which allows for a deeper engagement with the local cultures they encounter. Smaller cruise ships can also help foster a more personal connection between passengers and with the crew/staff. River and small ship 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, relating to such topics as history, military history, national parks, etc.). Passengers seeking the above travel experience in the northeastern United States and eastern Canada can avoid flying overseas (spending both money and time) to begin their cruise vacations (section relies heavily on Zable, 2022), although international visitors to the United States and Canada can also participate in these itineraries. **Table 1** provides a broad comparison between the smaller ship river and coastal waterway cruises and larger-ship ocean cruises.

Table 1: A Comparison of River and Ocean Cruises

	River and Small Ships	Ocean Ships
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).

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 by 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 a region at the slower pace of the riverboat (Sampson, 2020). The river 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 which can allow for more interaction with the local community (Cooper et al, 2019).

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 market, many consumers are attracted to the smaller ships cruising closer to home and the desire to reconnect with family and friends (Edenedo, 2022).

Waterways of the Mid-Atlantic, Northeastern United States and Eastern Canadian Markets

There is much similarity between river cruises and small ship cruises and the passengers attracted to them. Many cruise lines (such as American Cruise Lines or American Queen Voyages) provide both experiences in a variety of locations. In this geographic region, however, there are fewer rivers included in the overall regional transportation system compared to other regions (such as the Mississippi River, Ohio River, or the Columbia and Snake Rivers). The Hudson River (New York) along with the St. Lawrence River and Ottawa River in Canada, provide river cruising opportunities. The remainder of the cruises offered in this region are the coastal waterways tied to the Atlantic Ocean and its associated Bays (e.g., Chesapeake Bay; Cape Cod Bay; Massachusetts Bay; Penobscot Bay; Bay of Fundy; and many others), Gulfs (e.g., Gulf of Maine; Gulf of St. Lawrence) and the Intercoastal Waterway along the east coast of the United States.

At the time of this writing, cruise lines are working with boat manufacturers to develop new boat designs that will allow the development of new cruise experiences by allowing access to waterways that cannot be sailed with existing ships. For example, 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 waters as well as ocean coastal waterways along the East Coast, Pacific Northwest, and Alaska (Jainchill, 2022). This may allow the development of cruise excursions along the Connecticut River, the Delaware River, or the Penobscot River in the future (see American Rivers (2022) for a description of these waterways).

The Current State of the U.S. and Canadian River and Small Ship Cruise Industry

There are currently 12 cruise lines offering river and small ship cruises in the United States, Great Lakes, and Eastern Canada. 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 & St. 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.

The focus of this manuscript is the markets and waterways of the mid-Atlantic and northeastern United States and eastern Canada. A review of current cruises serving this market reveals there are four itinerary groups: (1) Mid-Atlantic; (2) New England – All USA Ports, (3) Canadian Maritimes and St. Lawrence River/Seaway (No USA Ports); and (4) Connecting the USA and Canada with both USA and Canadian Ports). **Table 2** shows the major cruise providers in each market.

Table 2: Cruise Lines Serving Each Market and/or Itinerary Type

	Mid-Atlantic Cruises	Northeastern USA (no Canadian Ports)	Connecting USA and Canada (Both USA and Canadian Ports)	Canadian Maritimes and St. Lawrence River (No USA Ports)
American Cruise Lines	X	X		
American Queen Voyages			X	
Hapag-Lloyd Cruises			X	
Lindblad Expeditions	X			X
Pearl Seas Cruises			X	
Ponant Cruises			X	
Silverseas Cruise Lines			X	
St. Lawrence Seaway Cruise Lines				X
Tauk			X	

Current Small Ship Cruises Offered in Each Geographic Market or Itinerary Type

Mid-Atlantic Coast

The three most common embarkation/debarkation ports of the mid-Atlantic region are: New York, NY; Baltimore, MD; and Annapolis, MD. Fall foliage cruises on the Hudson River tend to start and end in New York City in the month of October. Cruise operators (such as American Cruise Lines) package history-focused tours in this region under such names as “*American Revolution Cruise*,” or the “*Chesapeake Bay Cruise*” and visit such historically important cities as Williamsburg, VA, Yorktown, VA, Annapolis, MD, and others. Given the weather in the mid-Atlantic region, tours tend to run from March to December. Here is a list of the most common port stops in this region across all operators:

- West Point, NY
- Catskill, NY
- Albany, NY
- Norfolk, VA
- Williamsburg, VA
- Yorktown, VA
- Washington, D.C.
- Mount Vernon, VA
- Cambridge, MD
- St. Michaels, MD
- Crisfield, MD
- Tangier, VA

Table 3 provides a look at the itineraries available to mid-Atlantic cruisers.

Table 3: Cruise Offerings in Mid-Atlantic States

Cruise Line	Cruise Name	Cruise Length # of Passengers	Cruise Embark and Debarking Location
American Cruise Lines	Hudson River Cruises	8 Days / 7 Nights 100-170 Passengers	New York, NY to New York, NY
Lindblad Expeditions	Exploring the Hudson River: Fall Colors, Conservation & Creativity	8 Days / 7 Nights 62 Passengers	New York, NY to New York, NY
American Cruise Lines	American Revolution	11 Days / 10 Nights 109-170 Passengers	Baltimore, MD to Baltimore, MD
American Cruise Lines	Chesapeake Bay	6 Days / 5 Nights 100-170 Passengers	Baltimore, MD to Annapolis, MD (and reverse)
Lindblad Expeditions	Wild Chesapeake Escape	6 Days / 5 Nights 62 Passengers	Annapolis, MD to Annapolis, MD

Northeastern United States

The port city of Boston, MA is the hub of New England cruises for both ocean cruises and small ship cruises. According to the Massachusetts Port Authority, Boston's Flynn Cruiseport generates \$135.5 million in annual economic impact and supports 2,200 jobs in the local community. In 2022, the Port of Boston welcomed 125 ships across 19 different cruise lines. Four ocean cruise lines (Norwegian, Holland America, Celebrity, and Royal Caribbean) starting using Boston as homeports for its ships for at least part of the year (Gove, 2022). Gus Antorcha, President of Holland America Line, describes the appeal of this cruise market as follows: "*Our summer sailings are popular with couples, families and friends that love the rich history of this region, while the fall foliage departures attract those looking for a bucket-list experience with the beautiful colors of the season*" (Gove, 2022).

The cruise industry is important to the smaller port cities of the region as well. Bar Harbor, Maine expected to welcome 175 ships (typically for day visits) while Portland, Maine projected 95 cruise ship calls in 2022. According to a 2019 study by the Maine Office of Tourism, cruise passengers in Maine spent approximately \$70 each at every port they visited (Maguire, 2022). Cruises in this region tend to run from May to October. Here is a list of the most common port stops in this region across all operators:

- Portland, ME
- Bar Harbor, ME
- Gloucester, MA
- Newport, RI
- Rockland, ME
- Providence, RI
- Martha's Vineyard, MA
- Nantucket, MA

Table 4 provides a look at the itineraries available to cruises visiting only U.S. ports in the New England while **Table 5** presents the small ship or river cruises visiting with both U.S. and Canadian ports of call.

Table 4: Cruise Offerings in Northeast United States (no Canadian Ports)

Cruise Line	Cruise Name	Cruise Length # of Passengers	Cruise Embark and Debarking Location
American Cruise Lines	Cape Codder Cruise	8 Days / 7 Nights 109-170 Passengers	Boston, MA to Boston, MA
American Cruise Lines	New England Explorer Cruise	11 Days / 10 Nights 170 Passengers	Boston, MA to Boston, MA
American Cruise Lines	Grand New England Cruise	15 Days / 14 Nights 109 Passengers	Boston, MA to Boston, MA
American Cruise Lines	Maine Coast and Harbors Cruise	8 Days / 7 Nights 100-109 Passengers	Portland, ME to Portland, ME
American Cruise Lines	New England Island Cruise	8 Days / 7 Nights 100 Passengers	Providence, RI to Providence, RI
American Cruise Lines	Downeast Maine Cruise	8 Days / 7 Nights 109 Passengers	Bangor, ME to Bangor, ME

Table 5 Connecting the United States and Canada (both USA and Canadian Ports)

Cruise Line	Cruise Name	Cruise Length # of Passengers	Cruise Embark and Debarking Location
American Queen Voyages	Boston to Halifax	11 Days / 10 Nights 202 Passengers	Boston, MA to Halifax, NS
American Queen Voyages	Boston to Saint John	9 Days / 8 Nights 202 Passengers	Boston, MA to Saint John, NB
American Queen Voyages	Portland to Toronto	12 Days / 11 Nights 202 Passengers	Portland, ME to Toronto, ONT
Hapag-Lloyd Cruises	St Lawrence River and Nova Scotia - Canadian way of life	15 Days / 14 Nights 230 Passengers	Boston, MA to Toronto, ONT
Hapag-Lloyd Cruises	The states of New England: the historic cradle of the USA	12 Days / 11 Nights 400 Passengers	New York, NY to New York, NY (with stop in Canadian Maritimes)

Cruise Line	Cruise Name	Cruise Length # of Passengers	Cruise Embark and Debarking Location
Pearl Seas Cruises	Maine Coast and Canadian Harbors	8 Days / 7 Nights 210 Passengers	Portland, ME to Portland, ME (with stops in Canadian Maritimes)
Pearl Seas Cruises	Canada and New England Fall Foliage	11 Days / 10 Nights 210 Passengers	Quebec City, QC to Portland, ME
Pearl Seas Cruises	Canadian Maritimes and St. Lawrence Seaway	15 Days / 14 nights 210 Passengers	Portland, ME to Toronto, ONT
Ponant Cruises	From Canada to the American East Coast	15 Days / 14 Nights 64 Passengers	Toronto, ONT to Gloucester, MA
Ponant Cruises	From the St. Lawrence River to the American East Coast	13 Days / 12 Night 64 Passengers	Montreal, QB to Boston, MA
Ponant Cruises	From Québec to the Big Apple: nature & remarkable cities	15 Days / 14 Nights 64 Passengers	Montreal, QB to New York, NY
Silverseas Cruises	Quebec City to New York	11 Days / 10 Nights 392 Passengers	Quebec City, QB to New York, NY (and reverse)
Silverseas Cruises	Quebec City to Boston	9 Days / 8 Nights 392 Passengers	Quebec City, QB to Boston, MA
Silverseas Cruises	Quebec City to New York	10 Days / 9 Nights 392 Passengers	Quebec City, QB to New York, NY (and reverse)
Silverseas Cruises	Quebec City to New York	12 Days / 11 Nights 392 Passengers	Quebec City, QB to New York, NY (and reverse)
Tauck Cruises	Shores of Eastern Canada and New England	13 Days / 12 Nights 690 Passengers	New York, NY to Quebec City, QB

Canadian Maritimes and St. Lawrence River/Seaway (No U.S. Ports)

The Canadian Maritime Provinces – Nova Scotia, New Brunswick, and Prince Edward Island – are located east of the U.S. coast of Maine and are dominated by their large coastlines and small seaside port communities. The following description is offered by Roughguides.com (2022), a travel booking website:

“As their name suggests, Canada’s Maritime Provinces – Nova Scotia, New Brunswick and Prince Edward Island – are dominated by the sea, with a long, jagged coastline punctured by picturesque bays, sandy beaches, towering cliffs, some of the prettiest towns in Canada and the freshest, tastiest lobster in the world – Nova Scotia’s slogan “Canada’s ocean playground” is no exaggeration. Indeed, the ocean was crucial to the development of the Maritimes, not only in bringing waves of settlers but also accounting for its greatest industries: shipbuilding and fishing. Forestry became important in the nineteenth century, and even today, the bulk of the region remains intractable wilderness – 84 percent of New Brunswick, for example, is covered by trees.”

Geographically, the Maritimes are part of the Atlantic Canada region with the addition of Newfoundland and Labrador. This region, which includes the Gulf of St. Lawrence, serves as the geographic entry point to the St. Lawrence Seaway via the St. Lawrence River to provide ocean access to Canada’s inland provinces through the Great Lakes. It took over four years to construct the 189-mile waterway connecting Montreal to Lake Ontario and, ultimately, to the Atlantic Ocean (St. Lawrence Seaway System, 2022).

As its name implies, Canada’s St. Lawrence Seaway Cruise Lines (2022) offers passengers the opportunity to explore the seaway from Kingston, Ont. (in the west) to Montreal, QC to Quebec City, QC (in the east). Cruisers can also explore the Ottawa River, a tributary to the St. Lawrence River. Lindblad expeditions offered dedicated cruises focused on the Maritime provinces themselves. **Table 6** provides a look at the itineraries available to cruises serving the Canadian Maritimes and St. Lawrence Seaway with no U.S. ports.

Table 6: Cruise Offerings in Canadian Maritimes and St. Lawrence Seaway (no U.S. Ports)

Cruise Line	Cruise Name	Cruise Length # of Passengers	Cruise Embark and Debarking Location
Lindblad Expeditions	The Canadian Maritimes and Newfoundland	10 Days / 9 Nights 148 Passengers	Saint Johns, NF to Saint Johns, NF
St. Lawrence Seaway Cruise Lines	Celebration of Spring Seaway Discovery Heritage Summer Fall Harvest and Colour	8 Days / 7 Nights 66 Passengers	Kingston, ONT to Kingston, ONT
St. Lawrence Seaway Cruise Lines	Canadian Connection Cruise	7 Days / 6 Nights 66 Passengers	Kingston, ONT to Quebec City, (QB) (and reverse)
St. Lawrence Seaway Cruise Lines	Canada's Capital Cruise Confederation Cruise	6 Days / 5 Nights 66 Passengers	Kingston, ONT to Ottawa, ONT (and reverse)
St. Lawrence Seaway Cruise Lines	Upper River Expedition	5 Days / 4 Nights 66 Passengers	Kingston, ONT to Kingston, ONT

Local Market Conditions that Aid the Small Ship Cruise industry

The operating environment is multi-faceted and ever-changing. Company leaders seek a match between the opportunities present in the marketplace and the firm's ability to capitalize on them. Below is a list of local market conditions that aid the small ship cruise industry in the mid-Atlantic, northeastern United States, and eastern Canada.

Appealing Embarkation and Debarkation Ports

Dimitrov and Stankova (2019) found that attractive tourist destinations tend to make river cruises beginning from those locations more appealing to consumers. In essence, when cruising from Boston or Toronto, a consumer also gets to experience that city. According to the World Atlas, New York, NY is the most visited U.S. city while Boston, MA is the 9th most visited U.S. city. The list of most-visited Canadian cities includes: Toronto (#1); Montreal (#3); and Quebec City (#6) (World Atlas, 2022a & 2022b). These three cities are all located along the waterways listed above. As illustrated in **Tables 3, 4, and 5**, these cities are common embarkation and debarkation ports for cruises in the markets evaluated in this study.

Appealing Ports of Call

The characteristics that make European river cruises popular (i.e., historic towns, numerous attractions to visit, multiple cultural influences) are very present in the mid-Atlantic, northeastern United States and eastern Canadian cruise markets. In 2022, *New England Travel* named its "Top 10 Prettiest Coastal Towns in New England." Five of these cities are common small ship cruise ports of call (Minkin, 2022):

- Bar Harbor, Maine
- Camden, Maine
- Newport, Rhode Island
- Oak Bluffs (Martha's Vineyard), Massachusetts
- Provincetown, Massachusetts

A similar list of Canada's "7 Charming Coastal Towns in Canada" includes popular small ship destinations such as Lunenburg, Nova Scotia, Percè, Quebec, and St. John's, Newfoundland (Big 7 Travel, 2021).

The region offers an abundance of natural attractions, some of which are visible from the balcony or sun deck of a small cruise ship. Examples include:

- Cape Cod National Seashore (near Wellfleet, MA)
- Thunder Hole in Acadia National Park (Bar Harbor, ME)
- Aquinnah Cliffs (near Martha's Vineyard, MA)
- Block Island (near Shoreham, RI)
- Bay of Fundy (New Brunswick)
- Grand Manan Island (New Brunswick)

The legendary castles visible during European river cruises are ‘replaced’ by the estates of Newport, RI, the fishing villages and lighthouse of New England, and the historic homes of the Hudson Valley in New York. Here is how American Cruise Lines describes its Hudson River cruises (American Cruise Lines, 2022a):

“Surrounded by the Catskill Mountains on the western shore and the Taconic and Berkshire Hills to the east, the Hudson River is rich in both history and beauty. The cities and towns along the river date back to Dutch and English rule and feature some of the most magnificent architecture in America.”

“Our expert guides will lead you through these grand and historic sites including the Vanderbilt Mansion, the home of Franklin D. Roosevelt, and the Olana State Historic Site, home to one of the most influential Hudson River School Painters, Frederic Church.”

“At West Point Military Academy, walk the hallowed grounds traversed by some of the nation's greatest generals, and later visit the riverside town of Sleepy Hollow made famous by the great American writer Washington Irving.”

Cultural Diversity

This region of analysis offers a rich diversity of cultural experiences for travelers. For example, the dichotomy of busy urban areas and smaller coastal towns is present. The British, French, and broader European influences present in the province of Quebec as well as the provinces of Atlantic Canada (i.e., Nova Scotia, New Brunswick, Prince Edward Island, Newfoundland and Labrador) provide for easily accessible daily excursions for cruise passengers. Additionally, there are many opportunities to learn more about the indigenous people of Canada (Destination Indigenous, 2022). American Queen Voyages (2022a) describes its 12-day cruise from Portland, ME to Toronto, ONT as follows:

“Lighthouse-illuminated capes hug rocky shorelines and beachside vistas embrace emerald pastures on this postcard-worthy journey. Portland’s cobbled walks and Halifax’s Citadel Hill are complemented by Charlottetown’s pastoral beauty and the European contemporary design of Montreal.”

Convenience of Coastal Destinations

Traditionally, river- and small ship cruises follow a ‘one port per day’ model. All areas under evaluation for this manuscript offer an abundance of attractive destinations for daily stops while concurrently providing a scenic experience for travel between ports of call. American Queen Voyages (2022b) describes its 11-day Halifax to Boston cruise as follows:

“Between Halifax and Boston, this cruise gives you a front-row seat to New England’s impressive coastline. Enjoy cruising along North America’s stunning East Coast as the Ocean Navigator or Ocean Voyager traces historic sites from the Tea Party-era buildings of Boston to the hilltop citadel in Halifax. Along the way, you’ll experience the postcard-pretty sites in the United States as well as Canada’s Atlantic Ocean ports. Revel in the old-

world elegance of Newport's summer homes and explore galleries in lively Provincetown. Tour the first Pilgrim settlement in Plymouth and the old port waterfronts of Portland. Then sail to Bar Harbor, the gateway to the mountains, and the spectacular cliffs of neighboring Acadia National Park, before arriving in Halifax."

Waterway Stability

In Summer 2022, low river water levels affected shipping and cruise ship traffic on the Mississippi River in the United States. For example, Viking had to cancel select voyages and ports visited during their inaugural 2022 Mississippi River cruises due to drought conditions which led to historic low water levels. The same issue afflicted European river cruises in Summer 2022 (Watts et al, 2022). The cruise markets discussed in this study in the mid-Atlantic, northeastern United States, and eastern Canada traverse ocean waters or river waters connected directly to ocean waters which makes the likelihood of disruptions due to low water levels less likely. This geographic trait may also make these cruise markets less impacted (at least in the short-run) by any changes in water levels due to climate change.

Local Market Conditions that Challenge the Small Ship Cruise industry

Much as local market conditions can aid a specific product or industry, there are typically some local market conditions that offer unique challenges to firms that elect to compete in that market. Below is a list of local market conditions that challenge the small ship cruise industry in the mid-Atlantic, northeastern United States, and eastern Canada.

Seasonal Operations

The climate of the northeastern United States and eastern Canada typically experiences 4-6 months of winter weather, including the freezing of some slow-moving waterways. The St. Lawrence Seaway closes each year based on local weather conditions. The system tends to close in late December and re-open in mid- to late-March (American Great Lakes Port Association, 2022). Furthermore, the anticipated cold weather makes small ship cruises, with outdoor deck seating and port visits less appealing to their traditional consumer group of older passengers. This operating characteristic limits the length of the cruise season thereby reducing revenue potential of the industry.

St. Lawrence Cruise Lines operates its ship from May to October each year. The firm has a 6-month season in which to generate the majority of their revenue each year (St. Lawrence Cruise Lines, 2022). Like all seasonal operations, it can be difficult to retain employees from season to season when there is little off-season earnings potential offered by the firm.

The short season of 'fall foliage changes' is a seasonal trait to address as there is a limited amount of time for this natural phenomenon to occur each year. Cruise passengers interested in booking the "Maine Coast and Harbors Cruise" offered by American Cruise Lines have six options with all cruises offered in September and October (American Cruise Lines, 2022b). The popularity of its fall foliage cruises on New York's Hudson River allows American Cruise Lines to assign

two ships to serve passengers during its September and October operating season (American Cruise Lines, 2022a).

High-Cost Fixed Asset Utilization

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). Then, a cruise operator seeks to keep the ship moving and full of passengers to recoup their investment and cover their operating costs. This operating characteristic impacts the various small ship cruise lines differently. Some examples are provided below.

Pearl Sea Cruises operates the *Pearl Mist* from May to August in the Great Lakes and September in New England and the Canadian Maritimes (Pearl Seas Cruises, 2022a; Pearl Seas Cruises, 2022b). The company did offer its 12-Day Cuba Cultural Voyages in November and December 2018 via a round-trip cruise from Fort Lauderdale, FL. However, the U.S. government changed its travel regulation to Cuba in 2019 prompting the cancellation of such trips (Leposa, 2019). This cancellation effectively blocked the firm from diversifying their revenue with the addition of this Caribbean cruise. There may be additional opportunities for Canadian cruise operators, as Canadian citizens are free to travel to and from Cuba for vacations.

In 2023-24 cruising season, American Cruise Lines' deployed its *American Constitution* in the following geographic regions over the year: Mid-Atlantic (March-April); New England (May-September); Hudson Valley (September-October); and Mid-Atlantic (October-December) (American Cruise Lines, 202c). The reader will note the ship will be active for nine of the twelve months of the year. The Lindblad Expedition ship *National Geographic Sea Lion* operates year-round offering itineraries ranging from 6-days to 21-days in Alaska, Bahamas, Belize and Guatemala, Pacific Northwest, USA and South Atlantic Coast USA (National Geographic Sea Lion, 2022). It must be noted the ship can only accommodate 62 passengers per voyage (which limits its overall revenue potential even though it achieves 12-months of operation).

Influence 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 October 22 to October 2023, the exchange rate between the U.S. Dollar (USD) and the Canadian Dollar (CAD) fluctuated between \$1.30 USD-CAD to \$1.40 USD-CAD. That is, in October 2023, \$1.00 USD was worth \$1.30 CAD. One year later, \$1.00 USD was worth \$1.40 CAD, which is a 7.6% change in currency values (barchart.com, 2023).

Due the changes in exchange rates, the U.S. Dollar commands 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.

The cruise industry allows passengers to purchase future trips up to two years in advance. While this practice allows a passenger to lock in the price of their trip, international passengers must accept exchange rate risk or ‘transaction exposure.’ That is, the price of their trip is established in the present time but the actual out-of-pocket cost due to changes in exchange rates will be determined in the future (Hill, 2023, p. 329). Cruise lines must also deal with ‘translation exposure.’ That is, changes in exchange rates affect their overall profitability as reported on their financial statements (Hill, 2023, p. 329).

Port Facilities in each City Vary

As river cruising and small ship cruising in the United States and Canada is enjoying an increase in demand in the post COVID era, some port facilities are lacking in select markets. For example, the port of Detroit was not ready for the maiden cruise of the highly-anticipated *Viking Octantis* to visit in May 2022. The ship had to be diverted to a larger cargo terminal. Cities that used to welcome freighters are learning how to welcome cruise ships. Some of these communities are upgrading their port facilities for passenger traffic, including the needed customs facilities, as passengers from a variety of countries may be attracted to the cruise itinerary (Starr, 2022). Since cruise ships make timed visits to each port to stay on schedule each day, it is not desirable for passengers to wait in long lines to begin their shore excursions.

Match between Ship and Waterway Characteristics

Cruise operators must find a match between their ships and any local requirements such as ship beam (width), ship height, and ship draft (or depth in water). 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). The dimensions of the Welland Canal were factored into the design of the ship in anticipation of offering Great Lakes cruises.

As previously noted, cruise lines are working with boat manufacturers to develop new boat designs that will allow the development of new cruise experiences by allowing access to waterways that cannot be sailed with existing ships. American Cruise Lines’ CEO Charles Robertson noted the transformative effect of the new ship design (Jainchill, 2022):

"There's a lot of new itinerary potential. We go to about 100 ports in total now, and this boat can go to hundreds more. It can get into some really cool nooks and crannies in Maine and get further south down the waterway in Florida and do more in the Chesapeake Bay. It can hit these gems of towns that have really never been on cruise itineraries before."

The catamaran ship design, which requires less water depth to safely operate, is appealing as cruise operators seek “to enter small, New England harbors with a draft shallow enough for the Intracoastal Waterway on the East Coast yet stable enough to run coastwise routes in the Pacific Northwest and Alaska” (Jainchill, 2022).

Planning for Growth: Product/Market Growth Matrix

At the core, businesses (and industries) sell goods and services to consumers. Growth can be achieved by the sale of existing or new products to existing or new consumer groups. Some cruise operators are trying to expand the overall market by appealing to younger cruisers, expanding the summer cruise season, expanding into winter-month voyages, and expanding into new waterways (Futuremarketinginsights.com, 2022). By focusing on increasing overall demand for the river cruise industry (market growth vs. market share growth), all operators in the industry benefit. Generally, only the largest competitors/operators can employ this strategy however.

The Product/Market Growth Matrix can be an effective way to present the four growth options from this product/market mapping: Market Penetration; Market Development; Product Development; and Diversification (Grewal and Levy, 2023, p.45). **Figure 1** presents the Product/Market Growth Matrix applied to the river and small ship cruise industry. Each strategy is then discussed with examples provided.

Figure 1: Product/Market Growth Matrix

<p style="text-align: center;">Market Penetration Current Markets / Current Products</p> <ul style="list-style-type: none"> • Serving Repeat Customers • Pre-Cruise City Tours • Cruise Line Exclusive Attractions 	<p style="text-align: center;">Product Development Current Markets / New Products</p> <ul style="list-style-type: none"> • New Cruise Itineraries with New Ship Designs • Shorter Cruises in Current Destinations
<p style="text-align: center;">Market Development New Markets / Current Products</p> <ul style="list-style-type: none"> • Addressing the “Holy Grail” • Multi-Port Stops Per Day • Family Cruise Excursion Option • More International Travelers 	<p style="text-align: center;">Diversification New Market / New Products</p> <ul style="list-style-type: none"> • Guided Travel Experiences • Bundling of Cruise and Rail Experiences

Market Penetration

A market penetration strategy involves a focus on current customers consuming more of a firm’s current product/service offering. American Cruise Lines (ACL) created *The Eagle Society*, a guest loyalty program which provides incentive for satisfied customers to cruise again and to recommend others to do so. After one sailing, cruisers are eligible for membership. *Eagle Society* members receive a variety of benefits, including VIP access to ships when in port near their homes, payments of guest referrals to recommend others take American Cruise Line trips, travel gear, and cumulative rewards for subsequent cruises taken. Each year, ACL dedicates several cruises specifically for *Eagle Society* members, which include a welcome reception, onboard gifts, an

exclusive dining experience, and VIP access at a historically significant venue (American Cruise Lines, 2022d).

Pearl Seas Cruises offers its pre-cruise experience, including 1-night pre-cruise lodging and a guided city tour the day of departure. The guided city tour ends at the ship where guests find their luggage conveniently placed in the staterooms. Passengers departing from Portland, Maine enjoy a hotel stay just blocks from the port. They get to take in the maritime history of Portland before a late afternoon departure for their 8-day/7-night *Maine Coast and Canadian Harbors cruise* (Pearl Seas Cruises, 2022b). The operational advantages for the company include the certainty that passengers are on-time for their departure. Furthermore, the firm is generating revenue and providing value for passengers before the cruise begins.

Another strategy for implementing a market penetration strategy is the development of exclusive cruise-line attractions that draw passengers to a specific cruise line experience. For example, American Queen Voyages (AQV) (2022c) features an exclusive port at Nottoway Mansion on the south bank of the Mississippi River just outside of Baton Rouge, LA. Cruise passengers have many options along the lower Mississippi. However, it is reasonable to assume that some cruise passengers may be drawn to this exclusive AQV experience which is akin to ocean ship cruises spending the day on an island owned by Disney, Carnival, or other ocean cruise providers.

Market Development

A market development strategy involves expanding the market (i.e., reaching new consumers) for a firm's current product/service offering. Approximately 80% of river cruise passengers are Baby Boomers 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 United States at the slower pace of the riverboat (Sampson, 2020). A challenge for the industry is to expand the market for river and small ship cruises while concurrently maintaining and serving their traditional target market.

As noted previously, the river 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).

River and small ship cruises tend to be scheduled for 8-days (7-nights) or longer. The time commitment needed for a 7-night cruise may discourage younger cruises from these itineraries, particularly those travelling with children. While there are some 3-4 day ocean cruise experiences available, there are very few 3-4 day river or small ship cruise itineraries. One strategy (which combines product development to reach a new market segment) could be the development of 3-4 day trips from Boston, New York, Portland, or other attractive destinations. Port destinations in these markets are clustered together sufficiently to allow an easy-to-construct 3- or 4-day cruise experience. To test the appeal of this model, a cruise line could simply take 1-2 weeks per year

and offer two 3-or 4-day trips (likely in the summer months to allow families with children to participate) rather than offering the familiar 8-day/7-night trip popular with older travelers.

In the post COVID market, many consumers are attracted to the smaller ships cruising closer to home, and have the desire to reconnect with family and friends (Edenedo, 2022). To continue to expand the market for river and small ship cruises beyond its primary Baby Boomer market, these shorter-duration trips can appeal to families and small group travel (such as girlfriend's get-away cruises).

Large eastern cities such as New York, and Boston in the United States and Toronto and Montreal in Canada have large numbers of international flights. For example, Boston's Logan Airport served over 650,000 international passengers in September of 2022 (approximately 28% of total passengers) with over 60% of these passengers from Europe (Massachusetts Port Authority, 2022). In Canada, over 64% of the airline passengers at both Toronto and Montreal airports were international travelers in 2019. Together, these two airports served more than 44 million international passengers during that year (Statistics Canada, 2022). As travel to Canada was more restricted than travel to the United States during the global pandemic, the pre-pandemic year of 2019 is used as it is more illustrative of normal operations and travel patterns. This passenger volume allows cruise companies to more easily target international travelers for river and small ship cruise vacations.

Product Development

A product development strategy involves developing new products/services that appeal to existing consumer groups. New ship designs will allow cruise experiences to be developed to explore new waterways and communities. Three U.S. rivers (Delaware River, Connecticut River, and Penobscot River) were identified earlier for possible new cruise itineraries. Earlier quotes offered by industry leaders noted the great potential in the northeastern United States and eastern Canada for new cruise itineraries. Shorter-duration cruises are both a product development and market development strategy by offering a new cruise experience to attract an under-represented market segment (i.e., younger cruise passengers) (Cooper et al, 2019).

A geographically clustered area, such as the New England coast or Canadian Maritimes, allows the development of new 2-ports-per-day cruises. While this may counter the traditional one-port-per-day model, shorter port stays (with short distances in between) may also attract younger passengers who have embraced such concepts as speed dating, speed golf, and even speed job interviews. One can imagine a 'speed cruise' of 3-4 days with 2 ports per day.

The excursions offered for river and small ship cruises tend to be cultural or educational, relating to such topics as history, military history, national parks, etc.) (Zable, 2022). Small ship cruise lines, in select locations, could develop 'family-oriented' cruises and introduce excursions that are more appealing to children and their parents (such as children's museums in Boston, MA, Portland, ME, or Halifax, N.S.). The appeal of this strategy is a cruise line can offer the standard itinerary with a parallel 'family friendly' option and experiment with new excursions with minimal risk.

Diversification

A diversification strategy involves the development of new products/services that appeal to a market segment not currently served by the firm. In essence, new products/services bring new consumers to the organization. At the core, small ship cruise lines are providers of group travel with a focus on water and land travel. A cruise line could use their group travel expertise to develop on-land group travel experiences (likely via motorcoach and/or rail).

Cruise lines could also offer inter-model travel experiences. There may be overlap in the consumers interested in rail excursions and cruise excursions. One can imagine a cruise that terminates in Montreal connecting those passengers to a cross-Canada rail excursion provided by VIA Rail. Similarly, cruise passengers in Boston could connect to Amtrak for group travel to New York, Philadelphia, and Washington, DC.

Concluding Remarks

River and small ship cruises were gaining in popularity before the COVID global pandemic hit in Spring 2020. Research by the American Automobile Association (AAA) found that 40% of Americans are considering a cruise vacation in the next two years with Millennials even more eager (52%) for cruise vacations (Edmunds, 2022). The pent-up demand for travel spending (and cruise vacations, in particular) has helped propel cruise bookings above their pre-COVID levels. The successful summer 2022 cruise season suggests we may see growth in this travel category in the future. The strategies offered above may aid industry leaders in reaching their growth goals and desire to expand the market for river and small ship cruises beyond their traditional consumer groups.

The christening ceremony at the launch of a new ship is meant to offer ‘good luck and protection’ to the vessel and its crew in the future. Similarly, this study offers a baseline on current operations and the possibility of an expanding market for river and small ship cruise travel in the eastern United States and eastern Canada in the future.

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