BENEFITS OF BEING A CRUISE SHIP DESTINATION TO HUMBOLDT BAY

STAKEHOLDERS

By

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ABSTRACT

BENEFITS OF BEING A CRUISE SHIP DESTINATION TO HUMBOLDT BAY STAKEHOLDERS

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Humboldt Bay is a natural deep water port located in Eureka, California and is the gateway to the ecotourism opportunities available in the Humboldt region. As a port on the United States west coast the Port of Humboldt is along the route taken by cruise ships as they transit from southern California ports to Alaska. This creates the opportunity for Humboldt Bay to serve as a port-of-call during repositioning voyages. The research question that this paper sought to answer was - does cruise tourism represent a viable source for tourism development for Humboldt Bay stakeholders? This was investigated by synthesizing secondary sources which provided a review of the current state of the cruise industry, development of a cruise passenger profile, and the creation of a prospectus of potential excursion activities. The activities chosen were then coded based on the three basic dimensions of ecotourism and cruise passenger market segments. The research found that the ecotourism opportunities available in the Humboldt region would be appealing to cruise passengers. Therefore, cruise tourism does represent a viable source for tourism development for Humboldt Bay stakeholders.
ACKNOWLEDGEMENTS

“The redwoods, once seen, leave a mark or create a vision that stays with you always. No one has ever successfully painted or photographed a redwood tree. The feeling they produce is not transferable. From them comes silence and awe. It's not only their unbelievable stature, nor the color which seems to shift and vary under your eyes, no, they are not like any trees we know, they are ambassadors from another time.” – John Steinbeck, _Travels with Charley: In Search of America_

The experience of living behind the redwood curtain while attending Humboldt State University truly cannot be put into words and must be experienced firsthand.

I would like to thank Dr. Michelle Lane for agreeing to be my advisor for this project, it has been a joy to work with her and I truly appreciate the guidance she has provided. This experience could not have happened without the love and support of my family and friends. Thank you for understanding my absence from so many celebrations, gatherings, and life events, however I was there in spirit. To my mom and pops your unconditional support has empowered me to become the best person that I can be. To my cheerleaders in life Joel & Brian and Ann & Amee your unconditional love has provided me with the inspiration to begin and the drive to complete this journey.

To all the friends that I have made here in Humboldt thank you for keeping me safe, sane, and true to my goals. A-A-ron thank you for your editorial review and guidance, I look forward to reading your doctoral dissertation in a few years.
To my colleagues with the ITS department thank you for making sure that I always made being a student my first priority. Also to all of the HSU staff and administrators that I have had the privilege to get to know in various capacities, thank you for your encouragement.

A special thank you to Mr. Thomas Boyd (Class of ’72) for the generous financial contribution which sponsored my research and allowed for me to focus on completing this project. I am glad that we share the same enthusiasm for tourism and cruise ships attending Humboldt Bay.

Finally, I want to express to my fellow MBA cohort members, group team members, and to this program’s faculty how grateful I am to have shared this experience with you. I wish everyone fantastic, prosperous and exciting futures!
# Table of Contents

Abstract ............................................................................................................................... ii

Acknowledgements............................................................................................................ iii

List of Tables ..................................................................................................................... vi

List of Figures ................................................................................................................... vii

List of Appendices ........................................................................................................... viii

Introduction ......................................................................................................................... 1

Research Question .......................................................................................................... 3

Cruise Industry ..................................................................................................................... 4

Cruise Tourism History .................................................................................................... 4

Growth of the Cruise Industry ........................................................................................ 5

Cruise Destinations, Themes, and Value ......................................................................... 9

Cruise Passengers ......................................................................................................... 12

Humboldt Bay Region ...................................................................................................... 15

Overview ....................................................................................................................... 15

What is Ecotourism? ..................................................................................................... 17

Ecotourism Opportunities ............................................................................................. 19

Conclusions ....................................................................................................................... 27

References ......................................................................................................................... 29

Appendices ........................................................................................................................ 38


LIST OF TABLES

Table 1 Cruise market segment.................................................................................................................. 14
Table 2 Vessel operating in Alaska in 2016 that are ≤ 850 feet .............................................................. 16
Table 3 Cruise passenger market segments .......................................................................................... 18
Table 4 Mean anticipated spending for market segments....................................................................... 19
Table 5 Excursion prospectus for Humboldt Bay region....................................................................... 21
LIST OF FIGURES

Figure 1 Number of cruise passengers carried globally 2011 through 2016 ...................... 5
Figure 2 Occupancy percentage 2011 - 2015 ..................................................................... 7
Figure 3 Annual growth of onboard revenues – Source: (Mergent, 2016)......................... 8
Figure 4 Global vessel deployment in 2016 by available lower berth days ..................... 10
Figure 5 Count of “market segment appeal” combinations .............................................. 26
LIST OF APPENDICES

APPENDIX A .......................................................................................................................... 38
APPENDIX B .......................................................................................................................... 39
APPENDIX C .......................................................................................................................... 41
INTRODUCTION

For centuries Humboldt Bay lay hidden from European explorers of the California coastline. Its entrance undiscernible to notable navigators such as Sir Francis Drake, in the late 1500s, and George Vancouver, in the 1700s, due to its geography obscuring the entrance to this magnificent port (Heckrotte, 1973). The secretive Humboldt Bay entrance was discovered by Russian fur traders in the early 1800s. However, its documented discovery remained undeclared until the middle of that century when in St. Petersburg in 1852 the location of the Bay of Indians had been recorded in the *Atlas of the Northwest Shores of America* by Captain M.D. Tebienkov based on visits he made prior to 1848 (Heckrotte, 1973). In the period of time between the activities of the Russian fur traders and the publishing of its location the Bay was rediscovered by American merchants in 1849 with continued access to it solidified by the California Gold Rush and the need to access the gold mines of the Trinity mountain range ("Historic Humboldt Bay | Humboldt Bay Harbor District," 2016). Since its discovery Humboldt Bay has been the gateway for commerce and development for the region.

The goals that this paper seeks to achieve are twofold – provide a context for cruise tourism as a viable modality of tourism development for the Humboldt Bay region and identify the current tourism opportunities that the region has to offer to the cruise tourism industry. These goals will be achieved through the research, analysis, and presentation of secondary sources such as academic publications, industry literature, regulatory filings, and web resources. A brief history of the cruise industry will be
presented as a means to illustrate how this industry has developed. Followed by an examination of the growth that this tourism sector has been experiencing globally and particularly in the North American market. Through the synthetization of sources this paper will develop a relevant cruise passenger demographic profile inclusive of their propensity to explore and learn while in port.

Due to the predominant presence of nature in the region the paper will further develop a prospectus of potential excursion activities available in the Humboldt Bay region utilizing the three basic dimensions of ecotourism as defined by Blamey (2001). These dimensions are:

- nature based – offerings dependent on the natural environment
- environmentally educated – programs that fulfill a desire for knowledge about the environment
- sustainably managed – experiences that encompass the natural and cultural environment.

Blamey’s dimensions of ecotourism were selected as the framework for identifying excursion opportunities in the Humboldt Bay region because their underlying sustainability principle is the support of local economies (R. K. Blamey, 2001) and they also represent a trend for cruise passengers’ desired types of activities identified in much of the literature reviewed (Brida & Zapata, 2009; Business Research & Economic Advisors, 2014; Cruise Lines International Association, 2015; Dowling, 2006; Dwyer,
Research Question

The research question that this paper seeks to answer is as follows:

- Does cruise tourism represent a viable source for tourism development for Humboldt Bay stakeholders?
CRUISE INDUSTRY

Cruise Tourism History

The cruise tourism industry has grown quite substantially from Samuel Cunard’s modest first cruise voyage with 63 passengers aboard the steamship Britannia in 1840 (Gulliksen, 2008). Early cruise voyages had a duration of several weeks to months and were a means of long distance transportation linking travelers to coastal destinations across the globe (Dowling, 2006; Ward & Berlitz Publishing, 2016), a task which is now achieved in hours by modern aircraft. Initial long haul cruise voyages were aboard vessels designed more for their utility than the comfort and entertainment of all the passengers who were treated as cargo, divided by social class with the quality of accommodations determined by their ability to pay. Accommodations ranged from opulent first-class suites to the overcrowded confines of the steerage class below deck. During World Wars I and II cruise ships were appropriated by the military, taken away from performing their immigrant transport duties, to becoming troop transport vessels bringing soldiers to the theater of war (Gulliksen, 2008). The post-world war era propagated the rise of the middle classes in the industrialized world however the cruise vacation concept was still seen as an older wealthy person’s prerogative (Gulliksen, 2008). The trips of the cruise industry as we know it today, is composed of roundtrip voyages averaging 7 days which depart from embarkation points, usually strategically located near major airports, then visiting several ports-of-call began in 1972 with
Carnival Cruise Lines “Fun ship” concept (Brida & Zapata, 2009). No longer would cruising be relegated to the oceanic passenger trade as grand casinos and discos became generators of onboard revenues (Klein, 2009). Leading to the creation of the cruise vacation and a global industry projected to carry more than 24 million passengers in 2016 (CLIA, 2016) this is illustrated in Figure 1 below.

![Cruise Passengers Carried - Industry Global](image)

**Figure 1 Number of cruise passengers carried globally 2011 through 2016**

**Growth of the Cruise Industry**

The industry has grown from a mode of transportation connecting passengers to far-off locations to the newest vessels becoming destination unto themselves (CLIA, 2016; Dowling, 2006; Gulliksen, 2008; Ward & Berlitz Publishing, 2016). They take passengers on roundtrip voyages from strategically located embarkation points to ports-
of-call clustered in the Caribbean, Mediterranean, Europe/Scandinavia, and Alaska representing the top four global regions (Rodrigue & Notteboom, 2012). Increases in vessel capacity will continue to drive growth in the cruise industry. Orders booked for new ocean rated cruise vessels are currently at 52 vessels for delivery in 2016 through 2022 and will join the 471 cruise vessels currently in service (CLIA, 2016). In the 1970s through 1980s the number of cruise passengers grew from half a million to 1.4 million. Then significantly increasing by 63% to 3.8 million passengers in 1990 (Brida & Zapata, 2009). In 2016 the industry projection is 24 million passengers creating an industry valued at over $119 billion (CLIA, 2016). As the number of passengers and revenues increased so has the selection of vessels, itineraries, and destinations. Figure 2 illustrates the occupancy percentage for the cruise brands owned whole or in part by Carnival Corporation, Royal Caribbean Cruises Ltd, and Norwegian Cruise Line Holdings for fiscal years 2011 through 2015, as reported in the firm’s 10-K report filing with the United States Securities and Exchange Commission. Percentages are based on double occupancy of available lower berth days (ALBD)\(^1\) with values over 100% indicating that on average some cabins were occupied by more than two passengers (Carnival Corporation, 2013). This data is representative of an industry with strong demand and has the ability to scale supply in order to accommodate the demand.

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\(^1\) available lower berth days (ALBD): The standard industry measurement of a cruise vessel’s passenger capacity; calculated by “multiplying passenger capacity by revenue-producing ship operating days” (CSIMarket, 2016).
Figure 2 Occupancy percentage 2011 - 2015

Today’s vessels such as Royal Caribbean’s Harmony of the Seas, currently the largest class of cruise ship in service, has a passenger capacity of 5,496 (Ward & Berlitz Publishing, 2016) was placed into service in May 2016. It would be hard to have a dull moment aboard the Harmony of the Seas with amenities such as a central park, 37 bars including the Bionic Bar with robotic mixologists, waterslides, an outdoor AquaTheater, skydiving and surfing simulators in addition to the shops, casinos, swimming pools, and indoor theaters available on most modern cruise ships (Dowling, 2006; "Harmony of the Seas | Royal Caribbean International," 2016; Rodrigue & Notteboom, 2012; Ward & Berlitz Publishing, 2016; Yarnal, 2005). Cruise lines have used their vessel offerings as a means of differentiation in an industry where competition is high and the ports-of-call are often common between carriers making onboard revenues and repeat cruisers even more
important. Figure 3 below illustrates the growth of onboard revenue streams as reported by Royal Caribbean Cruises Ltd.\(^2\) and Carnival Corp.\(^3\) in fiscal years 2006 through 2015.

![Growth of Onboard Revenues](image)

**Figure 3 Annual growth of onboard revenues – Source: (Mergent, 2016)**

Growth in the industry is promoted by the Cruise Line International Association (CLIA), an organization that represents 95% of global cruise capacity created by its 62 member cruise lines aboard their 471 cruise ships (CLIA, 2016). It has the mission of “advocating, educating, and promoting for the common interest of the cruise community” ("About CLIA," 2016). Data provided by the CLIA is highly cited, this is due to its mission to promote the cruise industry, in the available literature and textbook regarding the cruise industry and represents a potential source of bias for some of the statistics

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\(^2\) Stock symbol – NYS: RCL  
\(^3\) Stock symbol – NYS: CCL
provided in this report but lacking alternatives it is the most logical reference for industry data (Brida & Zapata, 2009; Dowling, 2006; Dwyer et al., 2004; Hritz & Cecil, 2008; Jainchill, 2009; Klein, 2011; Ringer, 2006; Rodrigue & Notteboom, 2012; Yarnal, 2005). The United States cruise industry has an oligopolic structure dominated by five cruise brands – Carnival Cruise Lines, Royal Caribbean International, Celebrity Cruises, Holland America Line, and Princess Cruises representing 75% of non-wage operating and administrative expenses in 2013 (Business Research & Economic Advisors, 2014).

**Cruise Destinations, Themes, and Value**

The next factor in the cruise industry profile mix are destinations. By offering diverse itineraries cruisers have the choice of selecting a pre-established list of ports-of-call for which they are able to book excursions and activities in advance of arrival to the port or even several weeks in advance of departing for their trip. It is undeniable that the Caribbean region is the top destination for cruise tourist (Adams, 2010; Brida & Zapata, 2009; Carrier, 2004; Cruise Lines International Association, 2015; Dowling, 2006; Dwyer et al., 2004; Gulliksen, 2008; Hall, 2001; Hritz & Cecil, 2008; Johnson, 2006; Klein, 2009, 2011; Lacher, 2012; Mak, 2008; Ringer, 2006; Terrero, 2013; B. Thurau et al., 2015; Timothy, 2014; Tyrrell, Paris, & Biaett, 2012; Yarnal, 2005) receiving on average over 30% of ALBD. Followed by the Mediterranean with 18.7%, Europe\(^4\) with 11.7%, and Alaska at 4.1% as illustrated in Figure 4 below.

\(^4\) Excluding Mediterranean
In a 2014 survey of 1,600 residents of the United States and Canada performed on behalf of the CLIA by a third party research firm found that when asked the destination of their next cruise that 32% identified the Caribbean/Eastern Mexico, 20% Alaska, 16% Hawaii, 11% Mexico, 8% Domestic North America, and 8% Coastal United States (Cruise Lines International Association, 2015). This survey also revealed that 42% of cruisers returned to an itinerated destination after a cruise visit (Cruise Lines International Association, 2015; CSIMarket, 2016).
Themed cruises are also a part of the mix and have been a staple offering in the industry for several decades (Dowling, 2006). Cruise themes have included adventure/exploration, gay & lesbian, murder mystery\(^5\), food & wine, health & well-being, sporting destinations\(^6\), nudism, music and dance. The cruise industry is also experiencing increased interest from the convention and incentive marketing industry (2006). Theme cruises offer passengers the opportunity to experience a voyage with likeminded passengers and to destinations that are relevant to the theme.

Value is the last component, economies of scale in the cruise industry are being achieved through the building of larger capacity vessels. Cruise lines are realizing additional onboard revenues from the increase in passenger load (Rodrigue & Notteboom, 2012). The additions to the cruise lines fleet allow them to position vessels according to seasonal demand. This creates the opportunity for repositioning itineraries that occur as vessels shift to their new seasonal regions, allowing cruise lines to offer unique itineraries at bargain prices often offsets the higher air travel costs passengers incur due to return flights home departing from a different city than which they had arrived at for embarkation (2012). An example of a cruise ship repositioning would be a vessel changing from the Caribbean theater of operation to the United States west coast port of Long Beach via the Panama Canal in order to serve the Alaskan cruise market.

The cruise passengers’ perception of value has been identified by Petrick and Li (2006) as being two dimensional “perceived price” and “give”. The “perceived price” dimension

\(^5\) Usually short cruises of 1-3 nights
\(^6\) Such as golfing or surfing
relates to how cruise passengers perceive the financial cost for the cruise that was incurred. While the “give” dimension represents the non-monetary costs that cruise passengers experience while seeking a cruise vacations, the image of the cruise brand they select, and the convenience of the booking process (2006). The passenger’s perception of value is the balance between the two dimensions versus the cruise experience, onboard services, amenities (onboard and ashore). This is weighed against the utility of not taking the cruise versus the overall benefits they received taking the cruise (Petrick, 2004). Satisfaction within these dimensions has been identified as one of the leading factors for a cruise passenger’s propensity to book future cruises (Petrick, 2004; Petrick & Li, 2006; Yarnal, 2005).

Cruise Passengers

Much like the cruise industry, the global profile of the average cruise passenger is in a state of continuous evolution. In 1995 the average age of a cruise passenger was 69 years old (Rodrigue & Notteboom, 2012) however by 2014 the average age had fallen to 49 years old (Cruise Lines International Association, 2015). During that same period, 1995 to 2014, average incomes grew from $50,000 (Dowling, 2006) to $114,000. The cruise passengers of today are 72% employed, 21% retired, and 7% not employed. The profile also indicates that 84% of these passengers are married and 69% have college or post-college education levels (Cruise Lines International Association, 2015). The CLIA 2014 consumer profile (2015) further identified that when asked the “benefits of cruising versus other vacations” 70% felt it was a “chance to visit several locations” while 59%
sought to “explore vacation area/return later”, 52% are seeking adventure and excitement, and 40% would like a cultural learning experience. On average these passengers spent $565 for onboard and shore expenses (2015). Miller and Grazer (2006) further develop the cruise passenger profile with a focus on the North American market stating that 85% of North Americans have not cruised indicating “vast market potential”. Additional highlights from the Miller and Grazer (2006) profile indicate that cruise passengers can be segmented into six categories as presented in Table 1 below (see Appendix A for definitions). These market segments are representative of the diversification of the cruise passenger profile and are subject to evolve over time. It has been identified that 70% of cruise passengers booked their cruise vacation through a travel agent while 67% used an agent to plan their cruise (Cruise Lines International Association, 2015). The literature also indicates that one of the cruise passengers top concerns when selecting which ports to disembark at is the concern for their own safety while ashore (Fanning & James, 2006; Klein, 2009; Petrick & Li, 2006).

In a study of cruise passengers in Australia, Fanning and James (2006) found that cruise passengers sought to have experiences that were perceived to be of the highest quality and value for money. They further build the passenger profile by stating that passengers desire to feel special, seek attractions that are not overcrowded, and do not want to feel like they are being herded through a site or activity. Additionally, they found that the passengers who had attended excursions had a strong desire to feel a ‘sense of place’ by visiting the central business district either before or after the excursion. This study provided little demographic data on respondents however it was identified that their
origins were as follows - 50% USA, 17% UK, 6% Germany, and 15% Australia (Fanning & James, 2006).

**Table 1 Cruise market segment**

<table>
<thead>
<tr>
<th>Segment</th>
<th>%</th>
<th>Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restless baby boomers</td>
<td>33</td>
<td>Cost of is a factor in vacation selection</td>
</tr>
<tr>
<td>Enthusiastic baby boomers</td>
<td>20</td>
<td>Enthusiastic about cruising; seek escape from stressful life; vacations are coveted</td>
</tr>
<tr>
<td>Luxury seeking boomers</td>
<td>14</td>
<td>Money is not an issue when it comes to vacation selection; seek luxury and pampering</td>
</tr>
<tr>
<td>Consummate shoppers</td>
<td>16</td>
<td>Avid cruisers who seek best value for their money</td>
</tr>
<tr>
<td>Explorers</td>
<td>11</td>
<td>Highly education and experienced travelers; interested in diverse destinations; seek to learn and explore</td>
</tr>
<tr>
<td>Ship buffs</td>
<td>6</td>
<td>Extensive cruisers; vessel selection trumps other considerations</td>
</tr>
</tbody>
</table>
HUMBOLDT BAY REGION

Overview

Humboldt Bay is the gateway to adventure amongst the majestic redwoods of Northern California. This isolated region 271 miles north of San Francisco is nestled in a narrow corridor often considered difficult to access from a traditional traveler’s perspective. Situated in a natural deep water bay with a depth ranging from 38 to 48 feet is maintained annually through dredging by the United States Army Corp of Engineers (Simeone, 2015). The Humboldt Bay Harbor District has designated Schneider Dock for the reception of cruise vessels (Conner, 2015) with its 400 foot pier located at 990 W. Waterfront Drive, Eureka California and is able to accommodate vessels with a length of up to 850 feet ("Schneider Dock," 2016). Table 2 below lists the cruise vessels positioned in Alaska for the 2016 season and are under 850 in length which Schneider Dock could accommodate ("Alaska Cruises | Alaska Vacation Packages | Norwegian Cruise Line," 2016; "Alaska Cruises | Oceania Cruises," 2016; "All-Inclusive Alaska Cruises | Alaska Cruise Luxury Vacations | Regent Seven Seas Cruises," 2016; "Cruise Ships Database ::: TrueCruise.com," 2016; "Cruises to Alaska & Alaskan Cruise Vacations - Holland America Line," 2016; "Crystal Cruises," 2016; "Experience the Best Alaskan Luxury Cruises | Silversea," 2016; "Ultra-Luxury Cruises to Alaska | Alaskan Vacations - Seabourn Cruises," 2016).
The dock is a 1.1 mile walk to the shops, restaurants, and activities available in the historic Old Town district of Eureka. While the Wharfinger Building located at 1 Marina Way, Eureka California is a shorter walking distance from the dock, 0.4 miles, and it presents a potential use as a welcome center which then can be used as the departure and/or return point for excursions booked by cruise passengers. As a focal point for engaging with cruise passengers, the Wharfinger Building also provides a location for the sale of locally produced crafts, merchandise, food and beverage sampling, as well as educational and cultural programming (see Appendix B for relative locations).

Nestled between 110 miles of Pacific Ocean coastline and the majestic redwood curtain ("California Coastal Trail," 2016) Humboldt County California has a population of 135,727 (County Populations, 2015) concentrated in the cities of Eureka, Arcata, and

<table>
<thead>
<tr>
<th>Vessel Name</th>
<th>Cruise Line</th>
<th>Length in feet ≤ 850</th>
<th>Passengers</th>
<th>Crew</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crystal Serenity</td>
<td>Crystal Cruises</td>
<td>820.2</td>
<td>1090</td>
<td>650</td>
</tr>
<tr>
<td>Amsterdam</td>
<td>Holland America</td>
<td>780.8</td>
<td>1380</td>
<td>600</td>
</tr>
<tr>
<td>Maasdam</td>
<td>Holland America</td>
<td>719.3</td>
<td>1266</td>
<td>557</td>
</tr>
<tr>
<td>Norwegian Sun</td>
<td>Norwegian Cruise Line</td>
<td>848.0</td>
<td>1963</td>
<td>916</td>
</tr>
<tr>
<td>Regatta</td>
<td>Oceania Cruises</td>
<td>593.7</td>
<td>684</td>
<td>386</td>
</tr>
<tr>
<td>Seven Seas Mariner</td>
<td>Regent Seven Seas Cruises</td>
<td>713.0</td>
<td>708</td>
<td>445</td>
</tr>
<tr>
<td>Seven Seas Navigator</td>
<td>Regent Seven Seas Cruises</td>
<td>559.7</td>
<td>490</td>
<td>325</td>
</tr>
<tr>
<td>Seabourn Sojourn</td>
<td>Seabourn</td>
<td>650.0</td>
<td>450</td>
<td>330</td>
</tr>
<tr>
<td>Silver Discoverer</td>
<td>Silversea Cruises</td>
<td>337.9</td>
<td>124</td>
<td>52</td>
</tr>
<tr>
<td>Silver Shadow</td>
<td>Silversea Cruises</td>
<td>610.2</td>
<td>388</td>
<td>295</td>
</tr>
</tbody>
</table>

Table 2 Vessel operating in Alaska in 2016 that are ≤ 850 feet
Fortuna. It is home to the largest concentration of old growth coastal redwood forests almost all of which are protected (Bolsinger & Waddell, 1993) for future generations to explore and study. It is also host to numerous seasonal countywide art and cultural events such as art walks, galleries, architectural tours, and festivals ("Redwood Coast," 2016). Most significantly the county is home to several national and state parks, a UNESCO World Heritage Site, and the world’s tallest trees. This provides the perfect environmental mix required for the development and pursuit of ecotourism as well as traditional tourism opportunities. For the purpose of clarity this paper will focus on the ecotourism opportunities available in the Humboldt region, although traditional activities will be identified when possible.

**What is Ecotourism?**

Ecotourism can be broadly defined as “travel with substance” (Williams, 1992). The focus of ecotourism participants is to experience natural areas that are undisturbed for the purpose of enjoying the scenery inclusive of its wild animals and foliage (1992). The definition is further developed in the literature as the concept of experiencing “the natural environment in a way that has minimal negative consequences for the environment” (Carrier, 2004). Additionally, The International Ecotourism Society (TIES) provides the following definition of ecotourism “responsible travel to natural areas that conserves the environment and improves the well-being of local people” (B. Thurau et al., 2015). A common component in the literature investigated is that of ecotourism’s inclusion of cultural experiences (R. Blamey, 2001; Carrier, 2004; B.
Thurau et al., 2015; Williams, 1992) which refers to programming that is interactive, educational and experientially positive for the guests as well as the hosts.

Ecotourism as a travel sector complements the growth experienced in the cruise industry and has been identified as one of the fastest growing sectors of the tourism industry (R. Blamey, 2001; Carrier, 2004; Johnson, 2006; B. Thurau et al., 2015; Williams, 1992). Tourist who seek ecotourism opportunities are found to be, in comparison to other tourists, more affluent, better educated, and have a heightened awareness of the environment (B. Thurau et al., 2015; Weaver & Lawton, 2007). Thurau et al. (2007) identified that cruise passengers can be segmented into four categories, as presented in Table 3. It was found that ecotourism opportunities would appeal to passengers that fall into three of the segments – cultural discovery, action adventure, and natural discovery.

<table>
<thead>
<tr>
<th>Segment</th>
<th>Motivation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultural discovery tourists</td>
<td>cultural and historical learning opportunities</td>
</tr>
<tr>
<td>Action adventure tourists</td>
<td>outdoor sporting and local culinary experiences</td>
</tr>
<tr>
<td>Natural discovery tourists</td>
<td>seek wildlife viewing and escaping daily routines</td>
</tr>
<tr>
<td>Conventional tourists</td>
<td>safety, security, cleanliness, and family travel</td>
</tr>
</tbody>
</table>

A study conducted by Thurau et al. (2015) surveyed 181 passengers from American and British based cruise lines calling on two ports in the Panama Canal Watershed (PCW), Colon and Cristobal. Of the 181 passengers surveyed 110 passengers were able to be segmented into the four passenger market segment categories provided in Table 3. This study further identified the expenditure patterns of these passengers based
on their respective market segment category. This data from Thurau et al. (2015) is reproduced, in its entirety in Table 4 below. It should be noted that this information is anecdotal however due to a lack of alternative data sources it provides a representative indication of potential spending by cruise passengers who can be segmented as ecotourists. This data does indicate that passengers in all of the ecotourist market segments are highly likely to spend more than the conventional tourist segment.

Table 4 Mean anticipated spending for market segments

<table>
<thead>
<tr>
<th>Market Segments</th>
<th>Mean</th>
<th>Standard Deviation</th>
<th>n</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ecotourist (combined)</td>
<td>$128.13</td>
<td>151.38</td>
<td>80</td>
</tr>
<tr>
<td>Cultural discovery tourists</td>
<td>$106.11</td>
<td>119.47</td>
<td>18</td>
</tr>
<tr>
<td>Action adventure tourist</td>
<td>$146.35</td>
<td>196.57</td>
<td>26</td>
</tr>
<tr>
<td>Natural discovery tourists</td>
<td>$125.97</td>
<td>129.20</td>
<td>36</td>
</tr>
<tr>
<td>Conventional tourists</td>
<td>$85.17</td>
<td>58.67</td>
<td>30</td>
</tr>
</tbody>
</table>

Note: Standard deviations are truncated at $0.00. Reported estimates of expenditures range from a minimum of $0.00 to a maximum of $1,000.00. Source: Thurau, B., et al. (2015)

Ecotourism Opportunities

In 1980, the United Nations added the 42,400 hectares of California’s Redwood National and State Parks to the UNESCO World Heritage list (UNESCO World Heritage Centre, 2016) becoming the first in California7 (Appendix C). It is representative of the one of the many opportunities for ecotourism that the Humboldt Bay region has to offer. Utilizing Blamey’s (2001) three basis dimensions of ecotourism and the market segments identified by Thoreau et al. (2015) this section will develop a prospectus of the excursion

7 Yosemite was added to the list in 1984
activities available to cruise passengers calling on Humboldt Bay. The prospectus will be developed by providing a description of the individual activities then coded by identifying the dimensions using the following scale – (N) nature based, (E) environmentally educated, and (S) sustainably managed. The activities will also be coded for their appeal to the cruise passenger marketing segments as follows – (CD) cultural discovery, (AA) action adventure, (ND) natural discovery, and (CT) conventional tourists. All relevant segments and dimension will be coded as it is possible for activities to fall into multiple dimensions and appeal to multiple marketing segments. This data is presented in Table 5 Excursion prospectus for Humboldt Bay region below.
Table 5 Excursion prospectus for Humboldt Bay region

<table>
<thead>
<tr>
<th>Destination</th>
<th>Description/Activity</th>
<th>Ecotourism Dimension</th>
<th>Market Segment Appeal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arcata Architectural Homes Tour</td>
<td>Community created walking tours that highlight the historic and eclectic architecture of the town.</td>
<td>S</td>
<td>CD, CT</td>
</tr>
<tr>
<td>Arcata Community Forest</td>
<td>Considered a model for sustainable community owned forests. Offers a network of maintained hiking, biking, and horse riding trails.</td>
<td>N, E, S</td>
<td>AA, ND</td>
</tr>
<tr>
<td>Arcata Marsh and Wildlife Sanctuary</td>
<td>The Arcata Marsh Interpretive Center provides exhibits, bookstore, bird checklist and guided tours. Tours take you around the 307-acre wildlife sanctuary with many bird watching opportunities. Has 5 miles of hiking and biking trails.</td>
<td>N, E, S</td>
<td>AA, ND</td>
</tr>
<tr>
<td>Avenue of the Giants</td>
<td>32-mile drive amongst the trees with opportunities to shop, dine, and explore.</td>
<td>N, E</td>
<td>CD, ND, CT</td>
</tr>
<tr>
<td>Bergeron Winery</td>
<td>Experience the ambiance of the tasting room with views of the redwoods while enjoying pairings of wine, cheese, and breads.</td>
<td>S</td>
<td>CD, CT</td>
</tr>
<tr>
<td>Blue Lake Museum</td>
<td>Housed in the historic Arcata &amp; Mad River Railroad depot this museum displays artifacts from the regions indigenous, mining, and forestry roots.</td>
<td>S</td>
<td>CD, CT</td>
</tr>
<tr>
<td>Blue Ox Millworks &amp; Historic Park</td>
<td>Features demonstrations of Victorian era tools, a fully functional wood mill creates authentic period works.</td>
<td>S</td>
<td>CD, CT</td>
</tr>
<tr>
<td>Briceland Vineyards Winery</td>
<td>Learn the story of handmade small lot vintages. Features winery tours and a tasting patio in southern Humboldt.</td>
<td>S</td>
<td>CD, CT</td>
</tr>
<tr>
<td>Chapman’s Gem &amp; Mineral Shop and Museum</td>
<td>Local family owned gem store and museum. Contains extensive collection of gemological artifacts.</td>
<td>S</td>
<td>CT</td>
</tr>
<tr>
<td>City of Arcata</td>
<td>Home to Humboldt State University this historic gold rush town offers antique shops, museums, and architectural diversity. A variety of restaurants, coffee shops, and bookstores can satisfy any craving.</td>
<td>S</td>
<td>CD, CT</td>
</tr>
<tr>
<td>City of Eureka &amp; Waterfront</td>
<td>Stroll along Humboldt Bay, stop by the shops or grab a bite to eat in Old Town. Where you can even take a self-guided</td>
<td>N</td>
<td>CD, AA, ND, CT</td>
</tr>
<tr>
<td>Destination</td>
<td>Description/Activity</td>
<td>Ecotourism Dimension</td>
<td>Market Segment Appeal</td>
</tr>
<tr>
<td>------------------------</td>
<td>--------------------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>City of Ferndale</td>
<td>walking tour of the historic district. Visit the Humboldt Bay Aquatic Center to rent a stand-up paddle board or kayak then relax on the calm waters of the bay.</td>
<td></td>
<td>CD, CT</td>
</tr>
<tr>
<td>City of Ferndale</td>
<td>Identified by Forbes as one of “America’s Prettiest Towns”, this preserved Victorian era village takes you back in time to discover this hidden treasure.</td>
<td>S</td>
<td>CD, CT</td>
</tr>
<tr>
<td>City of Fortuna</td>
<td>The “Friendly City” of Fortuna is home to many antique shops, historic sawmills, and the Depot Museum.</td>
<td>S</td>
<td>CD, CT</td>
</tr>
<tr>
<td>City of Trinidad</td>
<td>One of the oldest incorporated cities in California, this seaside village offers amazing views of the Pacific Ocean from is cliff top vantage point. Numerous activities for all levels of interests and activeness are available.</td>
<td>N, E, S</td>
<td>CD, ND, CT</td>
</tr>
<tr>
<td>Clarke Historical Museum</td>
<td>Located in the historic Bank of Eureka building in Old Town Eureka. Displays a diverse exhibit of the regions past.</td>
<td>S</td>
<td>CD, ND, CT</td>
</tr>
<tr>
<td>Discovery Museum</td>
<td>Children’s museum offers exhibits and programs promoting hands-on, open-ended discovery in the areas of science, art, culture and technology.</td>
<td>S</td>
<td>CD, CT</td>
</tr>
<tr>
<td>Elk Meadow</td>
<td>Picnic while watching Roosevelt Elk in their natural environment.</td>
<td>N, E</td>
<td>ND</td>
</tr>
<tr>
<td>Fern Canyon</td>
<td>Featured in the film Jurassic Park II, this one mile canyon offers hiking along a canyon with walls covered in 5 varieties of ferns.</td>
<td>N, E</td>
<td>AA, ND, CT</td>
</tr>
<tr>
<td>Fern Cottage</td>
<td>Home to settlers Joseph &amp; Zipporah Russ exhibits the history of the Eel valley and the region. Celebrating 150 years in 2016.</td>
<td>S</td>
<td>CD, CT</td>
</tr>
<tr>
<td>Fortuna Depot Museum</td>
<td>Features the history of the region with artifacts of the last 140 years. This includes an operational blacksmith shop.</td>
<td>S</td>
<td>CD, CT</td>
</tr>
<tr>
<td>Fort Humboldt State Historic Park</td>
<td>“See how the artisans at Fire &amp; Light have transformed 9 million recycled bottles and jars into a line of beautiful hand-made glass tableware.”</td>
<td>S, E</td>
<td>CD, CT</td>
</tr>
<tr>
<td>Fortuna Depot Museum</td>
<td>Housed in the former Northwestern Pacific Railroad depot it displays artifacts of the regions past.</td>
<td>S</td>
<td>CD, CT</td>
</tr>
<tr>
<td>Destination</td>
<td>Description/Activity</td>
<td>Ecotourism Dimension</td>
<td>Market Segment Appeal</td>
</tr>
<tr>
<td>-----------------------------------------</td>
<td>-------------------------------------------------------------------------------------</td>
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<td>-----------------------</td>
</tr>
<tr>
<td>Humboldt Bay Maritime Museum</td>
<td>Collection of artifacts, photographs, archives and materials relating to the rich maritime history of California's North Coast.</td>
<td>S</td>
<td>CD, CT</td>
</tr>
<tr>
<td>Humboldt Bay National Wildlife Refuge</td>
<td>Protecting habitats for native species of birds, plants, mammals, and invertebrates since 1971. This refuge is a birdwatchers nirvana.</td>
<td>N, E, S</td>
<td>CD, ND</td>
</tr>
<tr>
<td>Humboldt Bay Oyster Tours</td>
<td>&quot;Wind in your hair, mud in your eye, and tasty Bucksport oysters in your belly.&quot;</td>
<td>N, E, S</td>
<td>CD, AA, ND</td>
</tr>
<tr>
<td>Humboldt Bay Tourism Center</td>
<td>Experience the tastes of Humboldt, featuring local beer, wine, cider, cheese, and more.</td>
<td>S</td>
<td>CD, CT</td>
</tr>
<tr>
<td>Humboldt Beer Tours</td>
<td>Explore the history and hand-crafted beers of Humboldt County.</td>
<td>S</td>
<td>CD, CT</td>
</tr>
<tr>
<td>Humboldt Botanical Garden</td>
<td>44.5-acre world-class living museum featuring a wide variety of native and exotic plants overlooking Humboldt Bay and the Pacific Ocean.</td>
<td>N, E, S</td>
<td>CD, ND, CT</td>
</tr>
<tr>
<td>Humboldt Coastal Nature Center</td>
<td>Learn about the diverse habitats of the Humboldt region through exhibits, interpretive trails, and hands on conservation activities.</td>
<td>N, E, S</td>
<td>ND, CT</td>
</tr>
<tr>
<td>Humboldt Lagoons State Park</td>
<td>Hike the California Coastal Trail and paddle (boat rentals available), swim, and fish at the lagoons. See wildlife in the ocean and along the shoreline.</td>
<td>N, S</td>
<td>AA, ND</td>
</tr>
<tr>
<td>Humboldt Redwoods State Park</td>
<td>Drive or walk through living redwood trees. Experience the beauty of Founder’s Grove. Opportunities to visit historic and cultural sites, participate in environmental interpretive guided tours.</td>
<td>N, E, S</td>
<td>CD, AA, ND, CT</td>
</tr>
<tr>
<td>Julia Morgan Historic Estate &amp; Garden Tours</td>
<td>Tour Redwood Grove and the estate designed by architect Julia Morgan.</td>
<td>S</td>
<td>CD, CT</td>
</tr>
<tr>
<td>Kinetic Museum Eureka</td>
<td>“Glorious Home for the History of Human Powered Art Racing.”</td>
<td>S</td>
<td>CD, CT</td>
</tr>
<tr>
<td>Lady Bird Johnson Trail</td>
<td>Level hiking through the grove designed for the dedication of Redwood NP.</td>
<td>N</td>
<td>AA, ND, CT</td>
</tr>
<tr>
<td>Loleta Cheese Factory</td>
<td>Real California cheese maker producing more than 34 varieties of cheese offers tastings and viewing of old-fashioned cheese making techniques.</td>
<td>S</td>
<td>CD, CT</td>
</tr>
<tr>
<td>Mad River Fish Hatchery</td>
<td>Guided and self-guided tours of this steelhead hatchery are available. It is</td>
<td>N, E, S</td>
<td>ND</td>
</tr>
<tr>
<td>Destination</td>
<td>Description/Activity</td>
<td>Ecotourism Dimension</td>
<td>Market Segment Appeal</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>--------------------------------------------------------------------------------------</td>
<td>----------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>Madaket Cruise</td>
<td>Located in beautiful Blue Lake which has breathtaking views.</td>
<td>N, S</td>
<td>CD, ND, CT</td>
</tr>
<tr>
<td>Morris Graves Museum of Art</td>
<td>Offers a variety of topical tours around Humboldt Bay including historical, wildlife, and cocktail cruises.</td>
<td>S</td>
<td>CD, CT</td>
</tr>
<tr>
<td>Natural History Museum</td>
<td>Inspiring art collection dedicated to the arts and artists of the Pacific Northwest.</td>
<td>N, S</td>
<td>CD, ND, CT</td>
</tr>
<tr>
<td>Old Town Carriage Co.</td>
<td>Take in the sights of Historic Old Town Eureka while riding in a horse drawn carriage.</td>
<td>S</td>
<td>CD, CT</td>
</tr>
<tr>
<td>Patrick’s Point State Park</td>
<td>This one square mile park offers a variety of activities for all levels of experience. Go agate hunting, discover tide pools, and stroll through a jungle of shrubs and trees as you peek out at sea lions, seals, and amazing migrating whales.</td>
<td>N, E, S</td>
<td>CD, AA, ND</td>
</tr>
<tr>
<td>Prairie Creek Visitor Center</td>
<td>Information, park film, passport stamps, bookstore, exhibits, picnic area, trailheads, also ranger-led activities and programs (seasonal).</td>
<td>N, E, S</td>
<td>CD, ND, CT</td>
</tr>
<tr>
<td>Redwood Coast Fishing</td>
<td>Guided fishing trips on the regions rivers catching striped bass and spring chinook salmon in the spring. Then steelhead and coastal salmon in the fall.</td>
<td>N, E</td>
<td>AA, ND</td>
</tr>
<tr>
<td>Redwood Creek Buckarettes</td>
<td>Horseback tours of Redwood National &amp; State Parks. The trail takes you through the variety of ecosystems in the redwood forest.</td>
<td>N, E, S</td>
<td>AA, ND</td>
</tr>
<tr>
<td>Redwood National &amp; State Parks</td>
<td>California’s 1st UNESCO World Heritage Site. The tallest trees on earth live here and are accessible by hiking trails aimed at novice to advance hikers. Opportunities for animal viewing including Roosevelt Elk</td>
<td>N, E, S</td>
<td>AA, ND, CT</td>
</tr>
<tr>
<td>Redwood Region Audubon Bird Walks</td>
<td>Community led bird watching tours. Learn about native and migratory bird species.</td>
<td>N, E, S</td>
<td>ND</td>
</tr>
<tr>
<td>Riverbend Cellars</td>
<td>European style hand-crafted artisan winery located on the Avenue of the Giants.</td>
<td>S</td>
<td>CD, CT</td>
</tr>
<tr>
<td>Rockefeller Forest</td>
<td>10,000 acre preserve of old growth forest. Step back in time on the loop trail hiking through some of the oldest trees on Earth.</td>
<td>N, E, S</td>
<td>AA, ND, CT</td>
</tr>
<tr>
<td>Destination</td>
<td>Description/Activity</td>
<td>Ecotourism Dimension</td>
<td>Market Segment Appeal</td>
</tr>
<tr>
<td>---------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>Scotia Logging Museum</td>
<td>Step back in time when visiting this 19th century logging town. Experience exhibits and architecture that express its history.</td>
<td>S</td>
<td>CD, CT</td>
</tr>
<tr>
<td>Sequoia Park &amp; Zoo</td>
<td>The oldest zoo in California features exhibits of endangered Red pandas. Located next to an old growth redwood forest.</td>
<td>N, E, S</td>
<td>CD, ND, CT</td>
</tr>
<tr>
<td>Sumeag Village</td>
<td>Recreated Yurok village located at Patrick’s Point in Trinidad. Experience the cultural traditions of the Yurok tribe.</td>
<td>S</td>
<td>CD, ND, CT</td>
</tr>
<tr>
<td>Tall Trees Grove</td>
<td>Hike to trees as tall as a 35 story building, home to the famous 368 feet Libby Tree- once the tallest tree in the world.</td>
<td>N, E, S</td>
<td>AA, ND</td>
</tr>
<tr>
<td>Telonicher Marine Laboratory</td>
<td>Humboldt State University’s marine lab is open to the public for tours and provides hands-on experiences with their touch-tank.</td>
<td>N, E, S</td>
<td>ND, CT</td>
</tr>
<tr>
<td>Trees of Mystery</td>
<td>Offers a variety of attractions including an interpretive walking trail, museum and Sky Trail taking along the tree canopy.</td>
<td>N, E, S</td>
<td>CD, ND, CT</td>
</tr>
<tr>
<td>Trinidad Museum</td>
<td>Trinidad’s rich cultural and natural history, with emphasis on indigenous traditions, the Gold Rush, whaling, and features historic and native gardens.</td>
<td>S</td>
<td>CD, ND, CT</td>
</tr>
<tr>
<td>Trinidad State Beach</td>
<td>Relax, picnic and search for sand dollars on this secluded yet relaxing beach.</td>
<td>N</td>
<td>ND</td>
</tr>
</tbody>
</table>

*Key –
Ecotourism Dimension: (N) nature based; (E) environmentally educated; (S) sustainably managed.
Market Segment Appeal: (CD) cultural discovery; (AA) action adventure; (ND) natural discovery; (CT) conventional tourist*

This table contains 57 destinations which is a sampling of the activities available in the Humboldt region. The table identified that 86% of the destinations fall into the (S) sustainably managed dimension, with 53% being (N) nature based, and 44% (E)
environmentally educated. The market segment appeal of these destinations denote ten unique combinations of potential appeal which are illustrated in Figure 5 below.

Figure 5 Count of “market segment appeal” combinations

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8 sum of the percentages is more that 100% due to destinations meeting criteria for multiple dimensions
CONCLUSIONS

The congruence of interests discussed in this paper creates an opportunity for the development of Humboldt Bay as a cruise tourism destination. This potential is supported by factors which have been presented in this paper. One factor to support this conclusion is the cruise passenger profile which has been developed. The profile indicates that the average cruise passengers’ age is decreasing while their income and desire for alternative types of excursions are increasing. They are highly educated and have a desire to seek adventure and excitement. A cruise represents the chance to experience many locations in a short amount of time. It is an opportunity for them to scope out what different locales have to offer. A good experience while attending Humboldt Bay has the ability to entice the passengers to return either on another cruise or on their own accord.

The Humboldt Bay region has the excursion elements that are becoming increasingly attractive to cruise tourist. The majority of the 57 destinations identified in the prospectus of Table 5 are a complimentary mix of environmentally educative and natured based activities combined with action adventure and natural discovery. These are components of the desired types of excursion opportunities developed in the cruise passenger profile. Overtime investment in the development and marketing of additional action adventure types of activities (i.e. zip lining, hiking tours) will further add to the appeal of the region. Cultural discovery destinations represent the greatest market segment offering in the region. These signify the potential for the development of numerous combinations of excursion packages that can be offered.
The development of Humboldt Bay as a cruise port destination could further be facilitated by being included on repositioning itineraries. Repositioning cruises offer passengers additional value through discounted booking costs. As the cruise passenger profile identified, value to them includes the non-monetary benefits they receive from the overall experience. The ecotourism forms of excursions available in the region have the ability to fulfill the desires of a variety of types of cruise passengers. Another opportunity for cruise port development is partnering with other west coast ports. This has the potential to create a new selection of destinations that can be included in themed itineraries based on the gold rush history of the coast, the ecotourism attributes of the variety of excursions available, or even coastal epicurean tours featuring the food, wine, beer, and spirits of each port.

The currently proposed Schneider Dock facility presents a potential barrier to Humboldt Bay’s wider acceptance by the cruise industry due to the vessel size restriction. This restriction on the length of the vessel of ≤ 850 feet limits the number of vessels able to call on the port, of the cruise ships calling on Alaskan ports in the 2016 season only 10 meet the criteria, see Table 2. Due to their ships not meeting the criteria, leads to the exclusion of major cruise lines such as Royal Caribbean, Carnival, and Princes Cruises.

Further research on this topic would benefit from engagement with local and industry stakeholders. Local stakeholders will be able to further develop the profile of Humboldt Bay and the excursion possibilities of the region. Industry stakeholders would be able to provide a perspective on their needs for a viable port-of-call as well as the needs of their passengers.
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Cruise market segment definitions (Willis, 2009) –

- Restless baby boomers:
  - are in their 40s & 50s, family oriented, looking for value, thrifty and likes the cost saving value of a cruise

- Enthusiastic baby boomers:
  - A little younger (early 40s) than the above category, adventurous, fun loving & family-oriented, the romantic experience appeals to them, see cruises as an entertaining way to meet many people

- Luxury seeking boomers:
  - Values ships that offer fine dining, pampering, money is not an issue as long as they perceive good value, cultured, well educated, experienced and active, average age – 52

- Consummate shoppers:
  - Well-travelled, 55 and above, like the pampering and the fine dining, the ship is as important to them as the destination, thrifty and looking for best deal for their money

- Explorers:
  - They see a cruise as a means to discover the world, destinations are far more important than the ship itself, well-educated and use their sightseeing to learn more, older (average 64) but still active, plans their cruise well ahead of time- not for the “early bird” discount but to make sure they have the desired cruise

- Ship buffs:
  - Most cruise savvy, they have an unusual knowledge of ships and itineraries, like longer cruises, average age is 68