

GREEN BOOK OF CRUISE INDUSTRY

ANNUAL REPORT ON CHINA'S CRUISE INDUSTRY (2016)

Advisor: QIAN Yongchang

Editor-in-Chief: WANG Hong

Associate Editors: YE Xinliang, SHI Jianyong, XIA Yu,
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An Introduction to the Editor in Chief

WANG Hong, Doctor of Enterprise Management of Shanghai Jiao Tong University and Postdoctor of Applied Economics of Fudan University, is currently assuming the office of Secretary of Baoshan Party Committee of CCP and Director of Shanghai International Cruise Economy Research Center; as a doctoral tutor and professor of Shanghai Jiao Tong University, she also enjoys the special allowance of the State Council, and is one of the members of the 10th, 11th, 12th and 14th NPC of Shanghai Municipal, and a national candidate for the New Century National Hundred, Thousand and Ten Thousand Talent Project.

Professor WANG Hong assumed the office of Vice Chairman of the Committee of Teaching for Business Administration of Higher Education under the Ministry of Education, and held the position Vice Chairman of the Committee of Teaching for Management Science and Engineering of Higher Education under the Ministry of Education. At present, Professor Wang Hong is in the list of the scholars chosen for the New Century Talent Support Program of the Ministry of Education as well as the Dawn Plan and Dawn Tracking Plan of Shanghai Municipality, honored as the leading talent and excellent academic leader of Shanghai Municipality.

Professor WANG Hong initiatively interfaces with the general trend of development of the international cruise industry, and has innovatively extended the content of teaching of the discipline of tourism management. She is the first person in China to start the undergraduate and graduate programs for cruise



economy and becomes the discipline leader. She led the Program of Innovative Practices for Cultivating Badly-Needed Talents of the International Cruise Industry on the Basis of Government Support, Industry Development, Talent Cultivation, Scientific Research and User Application, and won the second prize for 2014 National Teaching Achievements and the outstanding award for Shanghai Teaching Achievements. Professor Wang Hong emphasizes the direct transformation of research achievements into productivity and application. Some of the achievements have been converted into the basis for decision-making by cruise companies and the government. She has successively held several major projects of National Social Science Foundation, National Soft Science projects, 6 major projects of National Development and Reform Commission (NDRC) and over 30 provincial and ministerial research projects, published over 70 monographs and essays, many of which have been included by EI and ISTP. More than 30 of his research achievements have been successively awarded the first prize for Shanghai Governmental Decision-Making and Consultation Research Achievements, the second prize for Shanghai Science and Technology Progress Award, the excellent award of Shanghai Deng Xiaoping Theory Research and Propaganda, the excellent award of Shanghai Philosophy and Social Science Community Discussion, the first prize for Shanghai Teaching Achievements, and the first prize for Shanghai Education and Scientific Research Achievements and other provincial and ministerial awards.

Professor WANG Hong is also the former member of the Execution Committee of All-China Federation of Trade Unions, member of All-China Women's Federation, Dean of Shanghai University of Engineering Science, Vice Chairman of Shanghai Federation of Trade Unions, Vice Chairman of Shanghai Association of Enterprise Management, Vice Chairman of Shanghai Creative Industry Association, and Vice President of Shanghai Association of Science and Art, etc.

Foreword

China's cruise industry has been developed for a decade since 2006. The first decade has far-reaching significance for the future development of China. Although the history of cruise industry in China is short, the development speed and achievements are exciting.

Over the decade, China's cruise industry has grown out of nothing, with the market rapidly developed from a few coastal cities to the entire coastal area and further into inland cities, and cruise reception service and management experiences gradually accumulated to form an integral system. From an external viewpoint, over the decade, China has risen rapidly in the international cruise industry and has been highly valued by the world, becoming a new growth pole and breakthrough for the global cruise industry. It is reasonably believed that Asia will become the new center for the development of the global cruise industry in the near future. 2016, being the last year of the first decade, has profound influences on the orientation of the development of China's cruise industry in the following decade. Currently, China's cruise industry has entered into a critical and difficult development period. The key is to strategically participate in the competition of the international cruise market, whereas the difficulty lies in creating local cruise ship brands.

However, there are also some problems in the rapid growth of China's cruise industry. In China, the cruise industry starts late and the industry chain is incomplete. At present, China's cruise industry mainly focuses on ship berthing and tourist reception at cruise ports, which is a downstream link of



the industry chain, and the economic pulling effects of cruise ports are not obvious. Although local cruise industry has been growing, there is still a lack of local features and professional local operation talents, making it hard to create competitive national brands. The development mode for cruise tourism has not been formed yet, not to mention the disturbed market order by cut-throat competition in the cruise tourism market. There is also a lack of research on the pattern of the development of cruise economy to provide effective theoretical support and guidance for practice.

In 2011, Shanghai International Cruise Economy Research Center was settled down in Baoshan District, Shanghai Municipality to vigorously develop cruise industry in the district. Regarding the cruise industry as the leverage for regional economic restructuring, the Collection of Books has been introduced since 2014. The books focus on the pattern of cruise development, economic driving effect, supporting policies and economic and management modes of the cruise industry, the development and research on cruise tourism resources, tourism services, and marketing, etc.

After publication, the Collection of Books is followed closely by the tourism academic circle and the cruise tourism industry. The research findings in the collection are highly valued and approved, and regarded as the most authoritative cruise economy research works currently available and the theoretical basis for the government and enterprises to set down the policies and plans for the development of the cruise industry. It has been my honor to work as the editorial consultant of the Green Book on Cruise Industry. I'm satisfied with the influences of the Book.

The 2016 Green Book on Cruise Industry includes the annual feature articles for the reform on the supply side and the cruise industry, which focuses more on the development of local cruise tourism in the context of the structural reform on the supply side of the industry and includes more

innovative contents. It is believed that the Book will provide a reference for the development of the cruise industry in China as well as guidance for future development of the industry.

I hereby express deep gratitude to my colleagues who have long been contributing to the Book, as well as heart-felt thanks to all the friends who have cared for and supported the publication of the Book. Hopefully, my colleagues will make persistent efforts to achieve abundant findings in cruise economy research and thus provide strong intellectual support for the healthy development of China's cruise industry.

I hereby preface the Book and I hope more valuable contributions will be made.

QIAN Yongchang

钱永昌

2002年2月22日



Abstract

The Annual Report on China's Cruise Industry (2016) is an annual research report written by cruise experts organized by Shanghai International Cruise Economy Research Center on the basis of the latest development status of China's cruise industry. It is an integral part of Collection of Books of Social Sciences Academic Press. The Green Book on Cruise Industry for this year is the third book of the collection, and includes general report, report on the ten hot topics of cruise tourism this year, two feature articles and six special reports, with more abundant and complete contents in comparison with other editions. In general report, an overview is made on the new environment, new progress, and new normal and new stage of the development of China's cruise industry in 2016. The trend of development of the cruise industry is reflected in ten hot topics. Three annual feature articles introduce the achievements and failure of China's cruise industry in the past decade, in which the highlights for development of local cruise tourism in the context of the structural reform on the supply side are specially mentioned. Annual feature articles are divided into two parts to present the regional development and industrial structure of the cruise industry. Problems in the development of the cruise industry are discussed and policy suggestions are proposed.

In 2016, China's cruise industry keeps rapid growth. Coastal regions adhere to the national development strategy and seize the opportunity to become the world's center of cruise tourism. On the basis of complete construction of existing port cities, extended development of the cruise industry chain has been



continuously promoted and deepened. A complete cruise industry supporting system is being established to provide strong supports for long-term and sustainable development of China's cruise industry. A systematic and overall description in this regard is given in the general report. With the development strategy for China's cruise industry becoming more and clearer, a basic economic pattern consisting of three major economic circles is established, and infrastructure construction of cruise ports is basically completed. In general, the construction of cruise home port in China has been approaching to international advanced level. Currently, the main tasks are to continuously complete the infrastructure construction of cruise ports, establish port service standards, develop the cruise information platform, perfect immigration control formalities for customs clearances of outbound and inbound tourists, strengthen safety supervision over navigation channels, setup a complete vessel supply system, improve the carriage dispute response system, and maximize the interest of cruise tourists and construction of other associated software facilities. The central government and local governments have provided policy supports and financial aids for the cruise industry to further promote the construction of port cities and encourage the rise of national cruise brands.

Although it is late to kick off the market of cruise industry in China, it has been developed rapidly, and the market has been expanding. Along with the economic restructuring of China, especially in the general context of structural reform on the supply side, the great potential of the cruise tourism market is being unleashed. The book gives an in-depth analysis of how to promote the development of local cruise industry, how to prepare and introduce favorable policies for the industry and how to deepen and complete the cruise industry chain. In retrospect of the development of China's cruise industry over the decade (2006-2016), the year of 2017 welcome a more vigorous cruise industry enriched by more cruise products and routes. In 2017, customized routes

tailored based on individual demands will be designed and put into operation. In general report, forecast of the development of China's cruise industry are discussed based on the achievements and challenges during 2006-2016.

Special reports focus on various evaluation indicators of the cruise industry, development status of the industry and policy suggestions. In industry part, systematic research and analysis are carried out on industrial development in the context of institutional innovation for FTZ, establishment of the evaluation indicator system for economic contribution of cruise industry, the development and design of the customer satisfaction evaluation system and performance evaluation of the cruise industry, etc. It is pointed out that the evaluation system needs to be further assessed in the development progress of the industry, and the directions are proposed for further improvement of the cruise industry system of China. In policy part, opinions regarding cruise sales talents, and low-carbon emission of cruise ship, etc. are put forward. Responsibilities of the competent authorities in the development of cruise ports are clearly stated in order to complete the management function of each segment in port development, and improve management efficiency.



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General Reports

G.1

China's Cruise Industry During 2015–2016: New Environment, New Development, New Normal and New Stage

WANG Hong, YE Xinliang, SUN Ruihong, SHEN Dadong

Abstract: Despite the complicated changes in environments at home and abroad, China's cruise industry performed impressively in 2015, and smoothly entered into a new year of rising in 2016. The international cruise market still keeps growing steadily. The cruise market in Asia, especially in China, is steaming ahead with few surprises. As China's economy turns to consumption economy, people's tourism demands have been constantly increased, indicating the inception of the era of mass tourism. In this context, cruise tourism market expands fast.

Although Chinese cruise tourism market is growing, complicating issues like difficulties in design and manufacture, cruise route



products in urgent demand for diversification, unsound and inadequate policies for local cruise development, a growing number of disadvantages of chartered cruise ships and the high cost for talent loss in mid- to high-end cruise operation, management, design and manufacture hurt progress. However, as Chinese cruise tourism market keeps growing, capitals are provided through different channels for cruise industry, and cruise route products are developed; governments introduce preferential policies from time to time to support and encourage the development of cruise industry for boosting the development of Chinese cruise industry. With all these efforts, the industry is expected to have a sustainable development. It is believed that higher per capita income knowledge about the consumption pattern and a wider and deeper concept of the cruise tourism keep the staggering growth of Chinese cruise market.

Keywords: Cruise tourism; Chinese cruise industry; Local cruise

1 Analysis on Environment at Home and abroad for the Development of Chinese Cruise Industry in 2016

Compared with that in European and American countries, cruise tourism in China develops late but rapidly; meanwhile, the market keeps growing. The forecast of global economic growth and the analysis of international cruise tourism market prospects enable the cruise tourism in China to know clearly its position in the global cruise tourism market . Based on the experience in international cruise tourism development, the potential cruise tourism market



in China will be developed; the industrial chain of cruise tourism in China will be established and further improved for seeking a new breakthrough in the development of tourism economy in China and create an emerging type of operation. In this context, it is quite necessary to analyze the development environment for the cruise tourism in China from international and domestic environment.

1.1 International Environment

International environment could be analyzed mainly from two points of view: the international economic growth and the global cruise tourism market development during 2016-2017.

1.1.1 Global economy recovering slowly and tourist consumption market growing fast

Since 2014, world economy has gradually been recovered, and basically consolidated and maintained. Affected by the fluctuations in prices of bulk commodities, geopolitical changes, international capital flow, internal and external economic policies and relevant structural reforms caused by the economic entities, the world economic growth in 2015 was generally lower than the expected. As a whole, the economic development of developed economic entities in the world is growing, however the economic growth of emerging markets and developing countries tends to drop. Compared with that in 2014, the global economic growth declines to a certain extent. According to the *World Economic Outlook* updated by IMF, the global economic growth is expected to be 3.1% and 3.4% respectively in 2016 and 2017. The economic growth of China in 2016 forecasted by IMF is increased by 0.1%.

Among the main developed economic entities, the economy in the United States, Euro zone and Japan rises, while that of others declines significantly. In 2015, the GDP of the United States increased by 2.6%



and that of the Euro zone and Japan by 1.5% and 0.6%. Moreover, all of them increased by 0-1% compared with that in 2014. The GDP of other developed economic entities except for the United States, Euro zone and Japan increased by about 2.2%, which dropped by 0.6% compared with that in 2014. In addition, the overall growth of the emerging markets and developing countries in 2015 dropped by about 0.6% on average, while that in 2013 and 2014 by just 0.2% and 0.4%, respectively. In 2016, the economic growth in emerging markets will face many challenges. However, as a whole, the emerging markets and developing Asian countries are still the fastest growing economies in the world. In 2015, the growth rate was about 6.5%. However, according to the estimates of the World Bank, the global economic growth in 2015 was about 2.4%, and that of the developed countries and developing countries was 1.6% and 4.3%, respectively. Thus, it can be seen that the global economy is recovering slowly, which will further increase the disposable income and promote the sustainable development of the international cruise tourism consumption industry.

1.1.2 Global cruise tourism growing steadily and the center of cruise economy shifting eastward rapidly

According to the statistics of the Cruise Lines International Association (CLIA), 22.04 million tourists in the world took the cruise ship in 2014, including 12.16 million from the North America, increased by 3.4% compared with that in 2013. The number in 2013 increased by 2% compared with that in 2012, indicating increasing demands of global tourists for cruise tourism. It also drives the reforms and the new establishment of cruise lines and the expansion of the scale of the cruise ships in global cruise industry.

Over the past 30 years, in North America, Europe, Australia and the