

Chapter 5

Research on High-Quality Development Pattern and Path Improvement of Cruise Tourism in China



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Abstract Cruise tourism is a high-end form of modern tourism, the pursuit of high-quality tourism experience becomes the real demand of more tourists, so that cruise tourists experience a more quality-assured cruise tourism products, is to consolidate and enhance the international competitiveness of China's cruise market an important aspect. At present, there are some problems in China's cruise tourism market, such as unbalanced market supply and demand, unstable attraction of inbound cruise tourism, low interaction between cruise tourism and other tourism resources, etc. To promote the development of cruise product quality and specialization, to promote the transformation of cruise tourism to quality service, and to construct characteristic cruise tourism. The cruise market product system, the construction of a new order for the healthy development of the cruise tourism market, the creation of good basic conditions for inbound cruise tourism, the construction of a new cruise tourism market development system to further enhance.

Keywords Cruise tourism · Competitiveness · Quality tourism · Sustainable development

1 Introduction

The three tourism formats of domestic tourism, inbound tourism, and outbound tourism have achieved full prosperity in China that ranks first among global outbound tourist source countries and fourth among global inbound tourism host countries. Tourism has become a hotspot of social investment and a big comprehensive

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industry. In the era of mass tourism, people's needs for leisure and vacation rapidly grow, the pattern that pays too much attention to market scale has fallen behind and shifted to high-quality development that is already a development trend and consensus of the tourism community. Tourism itself is people's spiritual consumption, and quality is the soul of modern tourism. China has already possessed a huge scale and volume after the pursuit of scale growth for years. In the new era, there is a need to pursue more the improvement of quality, traditional tourism format and pattern will be replaced by new ones, and it's necessary to build the "China services" with Chinese quality, and build fine tourism products. The *Opinions of the State Council on Accelerating the Development of Tourism Industry* clearly proposes to make the tourism industry a strategic backbone industry of the national economy and make it a more satisfactory modern service industry to the people. The *Opinions of the State Council on Promoting Reform and Development of the Tourism Industry* clearly proposes to promote shift of tourism service onto high-quality service, to realize organic unification between standard service and individualized service. The *Opinions on Further Promotion of Tourism Investment and Consumption* proposes to focus efforts on improving the soft environment for tourism consumption, establish and improve standards for the quality of tourism products and services ..., and improve mechanisms for tourism complaints processing and service quality supervision. Tourist satisfaction is an important premise to promote the sustainable development of the cruise market, and enhancement of such satisfaction needs to be based on tourism quality improvement, to increase market competitiveness with better products and reduce substitutability. Cruise tourism is a high-end format of modern tourism. Pursing high-quality tourism experience has become a real demand of more tourists, while promoting high-quality development of cruise tourism is also an important foundation for promoting growth of cruise market size. Cruise tourism will gradually return to the right track of gaining competitive advantages in reliance upon product and service quality improvement, and to have cruise tourists experience cruise tourism products with more quality assurance is an important aspect of consolidating and improving the international competitiveness of the cruise market of China.

2 Analysis on the Cruise Tourism Development Situation in China

2.1 The Global Cruise Tourism Market Is Providing a Good Environment for China

The size of global cruise market maintains steady growth. According to the latest report of the Cruise Lines International Association (CLIA), in 2018, cruise ships will maintain the growth situation, and cruise market size is expected to reach 25.80 million visits, and to reach 37.60 million visits in 2025. According to the latest statis-

tics, the order for global luxury cruise ships has increased to 113 ships, with amount totaling USD 67 billion. International cruise lines including MSC Cruises, Princess Cruises, Norwegian Cruise Line, TUI Cruises, Star Cruises, and Costa Crociere, etc. have contracted with Italian Fincantieri and STX France, etc. for shipbuilding, with the latest delivery time already arranged to 2027, wherein, orders for 30 expedition cruise ships are expected to be delivered between 2018 and 2024. Cruise lines paid €5.6 billion to European shipyards in 2017, which are expected to build 66 new cruise ships by 2021, with total value exceeding €29.4 billion. Economic contributions of the cruise industry have continued to increase, including direct economic contribution, indirect economic contribution, and induced economic contribution. The economic contribution of European cruise industry reached USD 56.3 billion in 2017, increased by 17% compared with 2015 (Table 1).

According to data of CLIA, in 2017, there were 66 cruise ships in Asian cruise market, with 35 cruise brands, and cruise market size reaching 4.24 million tourists, increased by 36.7% compared with the 3.10 million in 2016, while the growth of global cruise market size was only 4.4% in 2017, meaning that the growth of Asian market was 8.34 times that of the world, which was directly associated with the good economic foundation of Asia.

2.2 The Size of the Cruise Tourism Market in China Is Progressing While Maintaining Stability

According to the *Report on the Tourism Work of China 2018*, the total tourism income achieved will reach CNY 5.98 trillion in 2018, with a year-on-year increase of 13%. In 2017, China's outbound tourism market reached 131 million visits, and outbound tourism spending reached USD 115.29 billion, with a year-on-year increase of 6.9 and 5.0%, respectively. The goals expected for 2020 are that the total tourism market size reaches 6.7 billion visits, total tourism investment reaches CNY 2 trillion, and total tourism income reaches CNY 7 trillion. In 2018, China continues to comprehensively promote supply-side structural reform, push the quality improvement and speed increase of social and economic development, promote steady development of economy, and implement the Belt and Road Initiative, etc., which provides a good environment for the cruise tourism development, however, the development of the cruise tourism market size has experienced a staged decline.

In the first half of 2018, China received 447 voyages of cruise ships, with a year-on-year decrease of 16%, and received 2.285 million visits of outbound and inbound tourists, with a year-on-year increase of 9%, wherein, it received 402 voyages of cruise ships from home ports, with a year-on-year decrease of 15%, and 2.189 million visits of outbound and inbound tourists via home ports, with a year-on-year increase of 11%, received 45 voyages of cruise ships from ports of call, with a year-on-year decrease of 26%, and received 95,600 visits of outbound and inbound tourists via ports of call, with a year-on-year decrease of 26%. In the first half of

Table 1 Building orders of global new cruise ships in 2018

Cruise lines	Cruise ship name	Cost (unit: USD one million)	Tonnage	Passenger volume (unit: person)	Target market
Carnival Cruises	Horizon Cruise	780	135,000	4000	Europe/Caribbean
Royal Caribbean	MS Symphony of the Seas	1300	227,625	5400	Europe/Caribbean
MSC Cruises	MSC Seaview	950	154,000	4140	Europe
TUI Cruises	Mein Schiff 1	625	110,000	2900	Europe
Seabourn Cruise	Ovation	350	40,350	604	Global
Norwegian Cruise	Bliss	1100	164,600	4200	Alaska
Ponant Cruise	Le Clamplian	110	1000	180	Global
Hurtigruten Cruise	Roald Amundsen	220	2000	600	Europe
Scenic Cruises	Ecliplc	175	16,500	228	Global
Celebrity Cruises	Edge	900	117,000	2900	Caribbean
Holland America	Nieuw Statendam	520	99,000	2660	Caribbean
AIDA Cruises	AIDInova	950	183,900	5000	Europe
Mystic Cruise	World Explorer	100	9300	200	Global

Data sources Cruise lines international association

2018, the voyages of cruise ships berthed in China were down by 85, only four ports had at least 50 voyages of cruise ships berthed there, including Shanghai Wusongkou International Cruise Terminal, Tianjin International Cruise Home Port, International Cruise Terminal of Guangzhou Port, and Shenzhen China Merchants Shekou International Cruise Homeport, and many cruise ports had less than 30 voyages of cruise ships berthed there, wherein, Zhoushan Archipelago International Cruise Port only had one voyage, and Yantai Port and Xiuying Port had 0 voyages. Shanghai Port International Cruise Terminal that receives the largest number of cruise ships from ports of call only received 11 voyages of inbound cruise ships in the first half of this year, markedly less than the 17 voyages in 2017; Sanya Phoenix Island International

Table 2 Number of home-port and visiting-port cruise tourists received in 2018

Port	Number of home-port tourists in January-June 2017	Number of home-port tourists in January-June 2018	Year-on-year growth (%)	Number of visiting-port tourists in January-June 2017	Number of visiting-port tourists in January-June 2018	Year-on-year growth (%)
Shanghai	118.9	126	5.9	5.79	4.08	-29
Tianjin	38.4	32.97	-14	2.64	2.27	-14
Sanya	0	0.68	-	2.00	0.64	-68
Xiamen	6.45	11.65	81	1.51	1.82	21
Qingdao	4.92	2.32	-53	0.11	0.03	-70
Zhoushan	0.132	0	-100	0.48	0.035	-93
Dalian	2.32	2.31	0	0.34	0.66	91
Guangzhou	19.76	24.56	24	0	0	-
Haikou	0	0	-	0	0	-
Shenzhen	6.32	18.37	191	0	0.0092	-
Yantai	0	0	-	0	0	-
Total	196.8	218.9	11	12.91	9.56	-26

Data source CCYIA

Cruise Terminal was the largest port of call of China in 2017, but it only received four voyages of cruise ships from ports of call in the first half of 2018, with a year-on-year decrease of 33% (Table 2).

2.3 Cruise Tourists' Requirements for Product Quality Are Becoming Increasingly Higher

As China's cruise tourism market develops, cruise ship form enters the upgrading period, and improving cruise product differentiation and quality becomes an important development direction and competition strategy. Many cruise brands, in order to better attract Chinese tourists, have promoted the cruise product upgrading, improved service quality, changed to use new and large cruise ships, and launched theme products. According to the statistics of Tuniu.com, in terms of cruise brand selection, Royal Caribbean's *Quantum of the Seas*, Costa's *Serena*, Royal Caribbean's *Ovation of the Seas*, Norwegian's *Joy*, Costa's *Fortuna*, Royal Caribbean's *Mariner of the Seas*, Dream Cruises' *World Dream*, *Majestic Princess*, Costa's *Atlantica*, and SkySea's *Golden Era* rank top 10 by popularity. Cabin environment, catering and

food, performances on board, onshore excursion itinerary, and theme activities, etc. are what tourists are most concerned about. And tourists have increasingly higher requirements for onshore routes, with personalized needs lifted significantly. Chinese tourists' outbound tourism is no longer limited to just buying, and their in-depth travel and self-service travel have become increasingly common. They pay more attention to outbound tourism experience and quality, and spend more and more on catering and cultural recreation.

In order to better meet Chinese tourists' needs for high-quality products, international cruise lines combine more Chinese elements fully with western cruise culture, for example, Chinese food such as hot pot and noodles is brought to cruise ships; Costa has joined hands with the 100-year brand: Quanjude Roast Duck, to integrate the Italian style and Chinese cuisine and further promote cultural exchanges between Italy and China; Ornaments with colored painting on Dream Cruises' Genting Dream and World Dream, etc. are integrated with "Chinese elements"; the Joy of Norwegian Cruise Line has phoenix, lotus, and auspicious cloud totems in red, yellow, and blue colors. In terms of cruise decoration, free sketch paintings of Chinese flowers, birds, insects and fishes are specially hung in some places. In terms of recreational facilities, more creative elements have been added, for example, FlowRider and Ripcord by iFly, etc. are available from Royal Caribbean's Quantum *of the Seas*, Go Cart and VR Game, etc. are available from Norwegian's Joy, and waterslides, etc. are available from Dream Cruises' World Dream.

3 Analysis on the Problems in the Cruise Tourism Market of China

3.1 Imbalance of Market Supply and Demand

In recent years, China's cruise market has experienced staged imbalance between supply and demand, resulting in lower profitability of cruise lines and declined experience of tourists (Wang 2017). The staged oversupply results in cruise tourism products to experience fierce price competition, a large number of chartered travel agencies to slid into loss, and foreign cruise lines to start to adjust transport capacity put into operation in China: Royal Caribbean's Mariner *of the Seas* and Princess Cruises' Sapphire Princess with Shanghai as home port left the Chinese market in 2017; Princess Cruises' Majestic Princess and Costa Crociere's Victoria operated with Shanghai as home port will say goodbye to the Chinese market in 2018; and Royal Caribbean's Quantum *of the Seas* will leave for Singapore in 2019.

From the perspective of market supply, the rapid growth of China's cruise market has caused cruise lines to centrally put cruise ships with large scales into operation within a short time. According to the data of home port cruise ships deployed at Shanghai Wusongkou International Cruise Terminal in 2017, 7 among the 12 home port cruise ships reached 100,000 ton, and the Quantum *of the Seas* with the largest

gross tonnage has standard passenger capacity of 4180 people. The cruise market supply has a structural surplus in China. Relevant department of China has not approved the pilot work of open-sea cruise route because, among other reasons, it is difficult to support visa without destination according to the existing laws and regulations and to control gambling tools on cruise ships. Long routes do not match the vacation system and costs (Shi and Sun 2017). Cruise products are now mainly based on 4–5 day short trips; as to the development of long trip products, most passengers cannot afford the time cost under current vacation system of China, which restricts the consumer group development. “Multi-port call” helps enrich the route design, promote port collaboration, and enhance attractiveness of ports of call. However, according to requirements of the *Announcement on Foreign Cruise Ships’ Conduct of Multi-port Call Business in China* of the Ministry of Transport, the multi-port call of foreign cruise ships belongs to domestic transportation that may be conducted only upon approval. The tedious application procedure and long approval time affect the enthusiasm of cruise lines. It’s difficult for service capacity of cruise port supporting facilities to meet demands within the short term, and for cruise ports to satisfy catering, accommodation, leisure and entertainment needs of tourists (Ye et al. 2014).

3.2 Attractiveness of Inbound Cruise Tourism to Be Enhanced

Shanghai’s efforts in cultivating and developing overseas cruise market are slightly insufficient, besides the insufficient cultivation of local cruise market. The inbound cruise tourism in China currently attracts inbound cruise tourists in the form of port of call. From January to June 2018, the development of inbound cruise tourism decreased significantly. The number of visiting-port cruise ships decreased remarkably. The number of visiting-port cruise ships received in China was 45, showing a significant decrease from the 61 in 2017. Even Shanghai Port International Passenger Transport Center that receives the most visiting-port cruise ships in China received only 11 inbound cruise ships in the first half year; and the number was significantly lower than the 17 in 2017. Sanya Phoenix Island International Cruise Terminal was China’s largest visiting port in China in 2017, but the port only received four visiting-port cruise ships in the first half year in 2018, showing a year-on-year decrease of 33%.

The outbound and inbound tourism of the cruise market has structural imbalance. From the perspective of market attractiveness, design of domestic cruise tourism products lacks richness and diversity, and domestic travel agencies are insufficient in overseas market expansion capacity (Sun et al. 2016), resulting in domestic and Shanghai cruise markets to be difficult to attract inbound tourists; publicity and introduction of Shanghai tourism are not much seen on some cruise ships, and some cruise staff members are not familiar with Shanghai’s tourism resources, and have low awareness rate of 114 h visa-free transit policy and 15-day visa-exemption entry

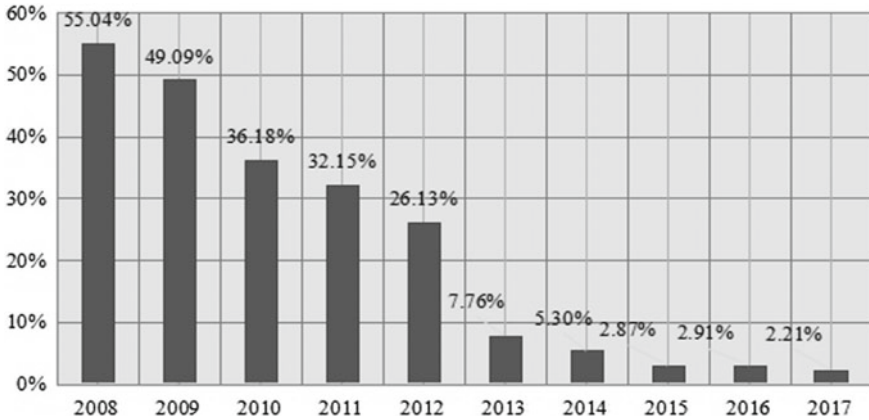


Fig. 1 Change diagram of proportion of inbound cruise tourists in Shanghai in 2008–2017. *Data source* Calculated by the authors

policy for foreign tour groups by cruise, etc. It’s difficult to increase motivation of foreign cruise lines in expanding inbound cruise tourism market in China because the cruise customs clearance and multi-port call policies in China have not been in line with international policies (Fig. 1).

3.3 Low Interaction Between Cruise Tourism and Other Tourism Resources

Currently, cities of many cruise ports are famous tourist cities in China where there are rich tourism resources, however, the development of cruise tourism in China is not much linked up with other types of tourism resources, resulting in tourists to fail to fully experience different tourism formats during the travel, not conducive to better improving the whole experience of and satisfaction toward cruise tourism. Cruise tourism of Shanghai where the largest cruise home port of Asia-Pacific region is located is insufficient in resource integration and joint development with tourism brands such as Huangpu River Cruise and Disney and with Jiangsu, Zhejiang and other surrounding areas, and lacks good overall design of tourist routes and brand publicity (Ye and Sun 2007).

The joint development of Shanghai cruise tourism and Yangtze River Delta tourism resources needs to be strengthened. The U.S. is still the world’s largest cruise tourism destination, and accounts for nearly 50% share of global cruise tourism destinations. It’s necessary to compare the construction of Shanghai and other international cruise city destinations, make clear advantages, and look for gaps, to thus construct Shanghai cruise tourism destination. There are 946 tourist attractions in Yangtze River Delta, accounting for 22.9% of the total in China, wherein, there are 27

AAAAA National Tourist Attractions, accounting for 20.8% of the total in China, and 254 AAAA National Tourist Attractions, accounting for 22.9% of the total in China. It's necessary to effectively integrate Shanghai and surrounding tourism resources, accelerate construction of Shanghai cruise tourism destination, and cultivate the cruise market, to boost the sense of gain of the people toward cruise tourism. However, there is a lack of good integration and joint development for the rich tourism resources of Yangtze River Delta. Despite the rich inland river tourism resources and cruise port resources in Shanghai (Ye and Sun 2007), Shanghai is insufficient in developing characteristic inland river tourism resources and conducting collaboration with other cruise ports in Yangtze River Delta, and has not conducted full integrative development of cruise tourism.

4 Suggestions on Countermeasures for Promoting High-Quality Development of Cruise Tourism

4.1 Constructing a Characteristic Cruise Market Product System

Promote the quality and characteristic development of cruise products, and drive cruise tourism to shift towards quality services. Support the tourist routes with characteristics and different periods that depart from Shanghai. Encourage and support cruise lines to open routes with Shanghai as port of call, and increase the voyage density in a scientific and orderly manner. Strive for policy support and convenience for opening new cruise routes from the relevant national ministries and commissions, develop multi-port call cruise routes departing from Shanghai and combination routes that include Hong Kong, Macao, Taiwan, and overseas ports (Mei and Ye 2018), strengthen cooperation with foreign port cities, promote development of fixed routes with multiple countries and home ports, and conditionally open cruise routes to nowhere and to surrounding islands. We should continue to deepen the implementation of policies for “multi-port call” and routes involving Hong Kong and Macao; and try to change the current operation-after-approval system to operation-after-filing system. Attract cruise ships with excellent quality and distinct characteristics to open Shanghai home port route, and form a cruise tourism product system that has rich hierarchy and is well-ordered. Support market players such as cruise lines to organize and operate theme cruise voyages with distinct characteristics of Chinese culture, and encourage Chinese cultural performance groups and performing arts companies to perform on cruise ships in European and American markets, to constantly increase influence of Chinese culture and promote tourism diplomacy.

4.2 *Creating a New Order for the Sound Development of Cruise Tourism Market*

We should strengthen the supervision and management of related institutions operating cruise tourism products to ensure an orderly development of product sales channels; incorporate the sales of cruise tourism products into Shanghai tourism industry management and integrity construction system for implementation of blacklist system; Set up a normalized mechanism of joint consultation and law enforcement of departments, and crack down on behaviors disturbing the sound development of the cruise market such as illegal stocking up on berths (Sun 2015). Support the establishment of cruise ticket management platforms. We should implement the pilot tasks of ticketing system of the Ministry of Transport in an all-round way, and establish a public cruise ticket management platform with supervision and service functions such as certification and inquiry; research and establish a mechanism for the admission, evaluation, punishment and withdrawal of a ticket sales agent based on the management system.

Improve the cruise ticket control mechanism: cruise lines shall establish the ticket sales agency access system and regulation system, define levels and criteria of agencies, conduct rating, filing and certification, and assessment and supervision of their authorized agencies, and grant sales agencies with higher levels the right to issue tickets, encourage cruise lines to establish a management and control mechanism of ticket information, and improve the ticket refund and change system.

We should encourage cruise lines and their sales agencies to explore the distribution models of direct selling and retailing in line with the characteristics of cruise market in China and to develop boutique onshore routes for cruise tourism; allow cruise lines to sell cruise tourism related service products provided by other qualified enterprises on their sales platforms.

4.3 *Creating Good Basic Conditions for Inbound Cruise Tourism*

Strive to create Shanghai cruise tourism destination. Effectively integrate Shanghai tourism resources, and accelerate cruise tourism destination construction. Increase publicity and promotion of Shanghai as a cruise tourism destination, and form international brand attractiveness of Shanghai cruise tourism destination. Promote development of the “air-water collaboration” and “water-water collaboration” cruise tourism patterns (Zhang and Cheng 2012). With the help of domestic and foreign tourism promotion conferences and exhibitions, we should make more efforts to advertise Shanghai cruise tourism to the world. Increase marketing of Shanghai cruise tourism, and give full play to 144-h visa-free transit policy and 15-day visa-exemption entry policy for foreign tour groups by cruise, etc., to attract international tourists to take cruise ships in Shanghai. Explore the incentives for international cruise lines and

foreign travel agencies that organize foreign tourists to conduct inbound tours, and further optimize the policy to provide convenience for the transit visa of international tourists via Port of Shanghai, to promote development of inbound cruise tourism market.

Improve the tourist service quality. Comprehensively improve the infrastructure supporting of cruise tourism, optimize short berthing service of cruise port, increase transportation convenience for tourists to reach port, improve facility supporting of cruise port areas, and enhance the experience of port services, according to the development idea of all-for-one tourism and requirements of international metropolis standards. Additionally, we should ensure more efficient cooperation among the departments at the cruise port, promote innovations in the customs clearance system and model of the cruise port, and comprehensively promote the general application of advanced technologies, such as face recognition, to reach higher clearance efficiency. Strive to expand the coverage of 144-h visa-free transit policy and visa-exemption entry policy for foreign tour groups by cruise.

4.4 Constructing a New System for the Development of Cruise Tourism Market

We should enhance the spreading of cruise culture. We should strengthen public media publicity, encourage the promotion of cruise culture in various public channel platforms, make full use of digital media, mobile Internet and other means, give full play to the advantages of new media communication, and build a comprehensive, multi-level and wide-range cruise culture spreading pattern. We should support the establishment of cruise columns in the media channels such as radio, television, newspapers, magazines and the Internet, the production of series advertising videos of cruise culture and public welfare, as well as film and television works about cruise themes. strengthening the integration of industry communication channels and resources, promoting cooperation with railways, airlines, star-rated hotels and other units, and intensifying precision marketing promotion; providing financial support for hosting or participating in major domestic and international tourism exhibitions and cruise-themed festivals.

We should support the development of the cruise source market in mainland China. encouraging cruise lines and agencies to develop cruise tourist market in mainland China, support to establish a joint-way and collaboration mechanism for the airlines and railways in Shanghai, and advancing the orderly development of “cruise + aviation”, “cruise + railway”, “cruise + interprovincial bus” and other “other+” in order to provide tourists with more convenient transportation conditions; Governmental departments at all levels should issue relevant policies to encourage and support cruise lines and agencies to cultivate and develop customers overseas and from other provinces and cities (Sun and Feng 2012). We should enhance the social influence of important cruise festivals and exhibitions, provide more support

for important cruise brand activities, and further enhance the social popularity and influence of Shanghai Cruise Tourism Festival and other cruise culture promotion activities. We should continuously make use of Shanghai's influence and resource advantages in Asia-Pacific cruise market, and strive for permanent settlement of cruise-related conferences with greater international influence in Shanghai, such as Asia-Pacific Cruise Conference.

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