



EVALUATION AND ANALYSIS OF CRUISE TOURISM DEVELOPING STRATEGIES IN SHANDONG, CHINA

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ABSTRACT

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Cruise tourism in China brings many tourism benefits to the local area. However, the cruise tourism market is facing a slowdown in growth. Based on the current situation of the cruise tourism market in China, this paper uses the PEST embedded SWOT analysis method to analyze the Chinese cruise tourism market and explore the potential problems to promote its growing. The findings are, in addition to the construction of dedicated cruise terminal as soon as possible, perfecting the relevant supporting facilities, the basis of Shandong diversification, innovation should be encouraged to attract qualified international cruise lines or investment developers cruise homeport development and construction, and take unified development pattern of the construction of the wharf and the surrounding areas, with other facilities earnings in its terminal yield, improve the enthusiasm of enterprise construction of pier. In summary, the improvement of the cruise industry service chain, the training of cruise professionals, the optimization of cruise tourism products, and the specific policy recommendations for the role of the cruise industry association are all discussed.

Contribution/Originality: This study is one of very few studies which have investigated cruise tourism developing strategies in Shandong, china. This paper uses the PEST embedded SWOT analysis method to analyze the Chinese cruise tourism market and explore the potential problems to promote its growing.

1. INTRODUCTION

Cruise industry, the "gold industry floating in the sea", can create tourism value, meanwhile drive business development of the port operation, vessel maintenance, crew services, etc. Recently, in addition to deepening the main target market, such as passengers of Japan and South Korea, Hong Kong and Macao, Malaysia, and Canada to develop tourism, governments of many countries and regions also uphold concept of "diversified development, global layout" to actively strive for the emerging markets of cruise, hoping make cruise industry become significant tourism at home and abroad, and bind to peripheral industry to promote economy industrial development and create employment opportunities.

China is entering the era of cruise, in the global cruise market downturn hovering, the rise of China's rich class brought just the need for tourism, enough to support China into the cruise power. In recent years, the layout of the world cruise in China has been accelerated. It can be expected that a superpower of the cruise industry is rising. In

the face of a prosperous product and changing demand era, China's cruise economy, as a new industry, its present situation and future will face opportunities and challenges is worth exploring.

The development of cruise tourism in China mainly relies on foreign cruise companies, which has no obvious pulling effect on local economy (Wang & Ye, 2017). However, with the rapid development of cruise tourism at home and abroad, understanding the cruise tourism needs of potential tourists in the Asia-Pacific Region can further promote the cruise-related market and formulate marketing strategies (Hung & Petrick, 2012). Therefore, it is particularly important to recognize the supply characteristics of the cruise market and grasp the development trend of cruise industry in China and even in the Asia-Pacific Region (Sun 2015).

On the coast of China, Shandong Province is an important province of the Blue Ocean Economic Belt and the Belt and Road Initiative. As the largest foreign trade port of Shandong Province, Qingdao City occupies a key position in the coastal cities of northern China. Qingdao is the sixth city with cruise homeport in China, and the fourth one has been approved as "China cruise tourism development experimental zone". Today, when port functions should be diversified and developed, developing the cruise industry can not only enhance port functions, but also bring great economic benefits to the surrounding areas.

Shandong Maritime Safety Administration's "Eight Measures to Serve Cruise and Marine Tourism Leisure Industry" supports and serves the development of cruise and marine tourism leisure industry in Shandong (China Shandong Network, 2018) which contributes to the transformation and upgrading of Shandong Marine tourism industry, improving quality, efficiency, safety and health. At present, Qingdao, Yantai and Weihai and other cities have built or planned to build professional cruise terminals, forming a group of cruise ports in northeast Asia. Facing the trend of the cruise market from Europe and America to China, as well as a series of favorable policies for cruise and tourism development issued by relevant departments, the hot spot of cruise tourism consumption will strongly promote the development of cruise economy in Shandong.

Based on the above research contents, this study focuses on two aspects: (1) Investigation on the development status of cruise tourism in China; and (2) Analysis on the development strategies of cruise tourism in China. The key points of the research are: (1) the definition of the time and scope of cruise tourism development in China; and (2) analysis and judgment of cruise tourism development strategies in China.

2. LITERATURE REVIEW

2.1. Cruise Travel

Since 1980, the annual passenger growth rate of the international cruise market has reached 8.2% (Travel Weekly China Travel News, 2018). The number of trips per passenger has grown from an average of six to an average of seven. This indicates that cruise travel has been favored by many tourists around the world. Cruise Lines International Association (CLIA) is bullish on the future of international cruise travel. According to the CLIA survey, more than 76.1% of cruise passengers agree that cruise travel is better than traditional destination travel. The United States has the highest percentage of cruise passengers, with 17 percent of the domestic market still having never cruised, let alone many of the world's untapped markets. Therefore, the potential future international cruise tourism market development is unlimited.

The world tourism organization predicts that China will become the world's largest cruise destination by 2020. China national knowledge infrastructure (CNKI) is China's most authoritative academic literature database. Up to November 30, 2018, CNKI has published 409 articles on the theme of "Cruise tourism" in the past five years. The represented one is "seasonal characteristics of cruise tourism: an empirical analysis based on the north American market" (Sun, Wu, & Feng, 2015b). There are 261 articles on the theme of "cruise line", and "a study on the basic characteristics and planning elements of cruise line setting" provides powerful impact (Sun, Wu, & Feng, 2015a). There are 280 articles on "cruise products" and 207 articles on "cruise tourists", "the comparative study of cruise company products based on routes and ships" is cited mostly (Wang & Ye, 2017). According to Sun and Feng

(2012) the key to cultivating China's cruise tourism consumption market is to provide cruise tourism products that meet the needs of consumers.

The average cruise traveler spends \$1,341, nearly twice as much as the average tourist, according to North American Cruise Companies. Cruise Mainly for sightseeing around countries or places of interest, has successfully managed this tourism market. In addition, according to statistics of the tourism market from international tourism organization in the last five years, cruise market create the highest profits and value. According to Sun et al. (2015a) only by providing excellent cruise ports and matching routes in emerging markets can the tourist market of the cruise industry be guaranteed and the risk of sudden infrastructure idling be effectively resisted.

2.2. The Background of the Development of Cruise Tourism in Shandong

Cruise Lines International Association (2019) pointed out that China is the largest tourist market for cruise ships in Asia. The popularity of cruise travel among Chinese is growing, fully demonstrating the potential of the island's cruise market. Japan and Korea has been a mature market for cruise tourism. Shandong is located in northeast Asia border, and has rich cultural tourism resources and other advantages, is bound to draw close a number of international cruise. As long as cruise operators actively promote cooperation and promote growth under the simultaneous development of port of call and homeport business, Shandong can take advantage of its geographical advantages to develop the cruise tourism industry to the mainland and southeast Asia with promising future.

In order to cultivate the Marine tourism zone and advance development of ocean power, Shandong has formulated the implementation plan of vigorously promoting the high-quality development of global tourism (Department of Culture and Tourism of Shandong Province, 2018). The plan focuses on building an international first-class port, promoting the construction of China (Qingdao) cruise tourism development experimental zone, building Qingdao and Yantai international cruise homeport as "Northeast Asia Regional International Cruise Homeport", and building Weihai and Rizhao as cruise port and yacht base.

3. RESEARCH METHODS

3.1. SWOT Analysis

SWOT analysis is a well-known strategic planning in business management theory. This study mainly analyzes the important internal strengths and weaknesses of Shandong, China, as well as the opportunity and threat faced by the external environment, in order to find out the niche that can be developed in the two provinces and serve as an important reference for strategy formulation.

3.1.1. Internal Analysis

Internal analysis is to understand the strengths and weaknesses of an organization, such as its mission, financial resources, professional capabilities, organizational culture, human resources, product features, marketing resources, etc. For example, a travel agency's advantage may be that its products are highly distinctive; while its disadvantage may be its poor access.

In addition, internal analysis is necessary to understand the implementation potential of each department. For example, if there is a strategy to expand the organization of promotional activities, can the finance department support the related funds for promotion? If what advertisement claims to want to convey is the affinity of employee, can operation department do? The purpose of internal analysis is not only to find out the strengths and weaknesses, but also to understand the coordination ability of various departments.

3.1.2. External Analysis

An enterprise's discussion of the external environment is called external analysis. External analysis can be further divided into environmental analysis, major competitor analysis and market potential analysis.

3.2. PEST Analysis

PEST Analysis is a model that uses environmental scanning to analyze Political, Economic, Social and Technological factors in the overall environment. It is also part of the external analysis of market research that gives policymakers an overview of the different factors in the overall environment. This strategic tool can also effectively understand the growth or decline of the market, the situation of the enterprise, the potential and the direction of the operation.

Based on the SWOT analysis of cruise tourism development in Shandong, China, this study introduces PEST to form the embedded SWOT analysis of PEST, referred to as SWOT-PEST, to deeply explore the internal and external environment of the strategy for analysis.

4. RESEARCH RESULTS

The cruise tourism market is changing rapidly. This study only uses the policies of 2015-2018 to analyze the development of cruise tourism in Shandong, China.

4.1 SWOT-PEST of Developing Cruise Tourism in Shandong Province

4.1.1. Strengths

(1) Political and legal factors

① Policy support and financial incentives

Qingdao, Weihai and Yantai have all issued the incentive policies for cruise affiliation. In the future, they will connect the mountain-city-sea-island-port tourism routes through the configuration of cruise yacht terminals and related facilities, reflecting the open and elegant attitude of Shandong land and water ports, highlighting the city's characteristic image, and enhancing the city brand value of land and sea cultural integration.

② Superior geographical location and location conditions

China, Japan and South Korea all have the conditions to develop cruise tourism and build a cruise economic industry chain of China, Japan and South Korea. Shandong has many international seaports and regional hub airports, with the Shandong Peninsula blue economic zone approved by the State Council, and the Jiaodong peninsula is the main node of the "one belt and one road" and the strategic fulcrum of maritime cooperation.

③ Prospering the city with port: promoting the coordinated development of port city

Yantai port and Qingdao port carry out cultural tourism development for the old warehouse and old factory buildings in the old port area, and make use of the flow of people information brought by the cruise home port to respectively build the leisure and recreation cultural experience belt and the blue economic high-end business belt.

(2) Economic factors

① Rich tourism resources

This is an important reason for Shandong to attract international cruise ships. At present, the service system of Shandong's tourism industry is gradually in line with international norms, integrating the comprehensive supporting facilities of "food, housing, transportation, tourism, shopping and entertainment".

② Rapid growth of cruise lines

At present, Shandong promotes cruise homeport city at Qingdao and forms a cruise combination port. In recent years, we have developed Northeast Asia, Europe and the United States, increased the connection density, and developed the home port routes of Dalian, Shanghai, Xiamen, Taiwan, Hong Kong or Hainan, as well as other East Asian cruise routes.

③ Huge potential customer market scale

China's cruise passenger volume will see 10 million in 2030, and the penetration rate of cruise market will increase by 0.5% - 1%. Cruise tourism will not only become mass tourism, but also become the world's largest cruise tourism market (Shanghai International Shipping Research Center, 2015).

(3) Social and cultural factors

① Rich cultural tourism destination resources

Shandong is a province with a large economy, culture and population. It has a profound cultural heritage, beautiful natural scenery and hospitable people. The profound advantages of human resources are easily recognized by Chinese and foreign tourists.

② Livable city group

Jiaodong Peninsula has beautiful urban environment and high green coverage. It has a long coastline, many islands and a warm climate. In recent years, Qingdao, Yantai and Weihai have won the title of "the most suitable city for human habitation in the United Nations", so they are suitable for living, leisure and tourism.

③ A new way of tourism and leisure

Jiaodong Peninsula is a place for leisure and health preservation. The marine tourism culture and cruise tourism culture fit together.

(4) Technical factors

① Rich ship building foundation

Qingdao, Yantai and Weihai have made outstanding achievements in the design and construction of ships and supporting facilities, laying a technical foundation for the construction and maintenance of luxury cruise ships, as well as providing technical support for the good development of cruise economy.

② Superior port conditions and abundant transportation resources

All ports in Shandong are excellent natural harbors. Shandong has successively built a highway network, railway network and airport, enabling the seamless connection of transportation network among four ports in Shandong, such as roads, railways and airports, to provide strong traffic support for the construction of cruise home port.

③ Port and waterway transformation and upgrading

Shandong has invested heavily in infrastructure construction of the port and shipping industry, accelerating structural adjustment and transformation and upgrading, promoting the informatization construction of port and shipping, and actively developing the Internet + port and shipping, and creating intelligent ports. The next step will be to optimize the port layout and functional configuration, upgrade the old port area, and enhance the service functions of cruise, tourism and passenger transport in the old port area, which are closely integrated with the urban development.

④ Rich experience in cruise reception

Many international Cruises (such as Costa, Royal Caribbean and Star Cruises) have landed in Qingdao to bring many tourists. Weihai has also opened the route of Mount Tai China, which has accumulated experience for the development of cruise tourism in Shandong.

4.1.2. Weaknesses

(1) Political and legal factors

① Imperfect management and coordination mechanism of cruise tourism

The mechanism of developing cruise tourism in Shandong has not been industrialized, internationalized and marketized, and the market has not played a basic role in resource allocation. Some institutional barriers and departmental barriers lack sufficient power and vitality to restrict the development of cruise tourism.

② Lack of sufficient publicity and promotion

The promotion of cruise tourism in Shandong Province is rare, and the form is single. The relevant industries and consumers in Shandong Province know little about it, and they lack the desire of marketing, purchase and consumption.

(2) Economic factors

① The urban brand effect is not strong enough and the overall economic development level is not high

Compared with the cruise routes, cruise flights, cruise brands, number of stops and number of tourists, the Yangtze River Delta is led by Shanghai, the Bohai rim is centered by Tianjin, the South China coastal rim is centered by Hong Kong, Guangzhou and Shenzhen, and the two sides of the Taiwan Strait are centered by Xiamen. Shandong is not competitive for the time being.

② The route is not innovative enough

There is little difference among the cruise tourism routes in Shandong, with Jeju, Incheon, Seoul in South Korea, Fukuoka and Okinawa in Japan as the main business entities, with single routes and little change in destinations.

(3) Social and cultural factors

① Low recognition and popularity of cruise tourism market

There are still many misconceptions about the consumption of cruise products by people in Shandong Peninsula, and the specific work of each city has not really extended to the cruise economy.

② Low public recognition

The price of cruise tourism, the homogeneity of routes and the recognition of consumers are the problems that travel agencies should solve. Tourists in Shandong Province are more sensitive to price, which makes tourists have a low awareness of cruise travel.

(4) Technical factors

① Imperfect port control procedures and soft environment need to be optimized and improved

Qingdao port is the only port in the four major ports in Shandong Province with a relatively complete passenger transport hub, while the other three ports have no dedicated cruise terminals. The supporting construction of specialization and modernization is also lagging behind, which directly affects the international cruise docking.

② Cruise tourism professionals are insufficient, professional quality needs to be improved

In Shandong, there is a shortage of foreign language guides who explain the itinerary to tourists from all over the world. In addition, a few colleges and universities in the province offer cruise crew major or related courses, and there is also a lack of departments dedicated to cruise tourism, resulting in the scarcity of cruise tourism professionals.

4.1.3. Opportunities

(1) Political and legal factors ① The central government strongly supports the cruise tourism industry

In 2015-2016, the State Council issued three documents, which clearly proposed to promote the development of cruise tourism industry, encourage enterprises to develop and build cruise ships, and give 15 days of visa free support to international tourists entering the country through cruise ships. Some opinions on promoting the integrated development of transportation and tourism are proposed to promote the infrastructure of cruise ports and increase cruise tourism routes (Ministry of Transport of China, 2017).

② The opportunity of China South Korea FTA

The favorable policies of FTA can attract tourists to choose the cruise tourism products of the Korean line, promote tourism shopping and consumption, and expand the cruise tourism influence of the two countries.

③ A good prospect for the development of cruise tourism in the world

The World Tourism Organization predicts that China will become one of the largest tourism destinations in the world in 2020 (Xinhua Net, 2018). Domestic and foreign tourists have obvious and urgent demand for cruise tourism. In recent years, Shandong has become a tourist destination city for tourists from Japan, South Korea and other countries, and also attracts Western European and American tourists who are interested in oriental culture.

④ Integration and integration: integration of Port Development

Qingdao is now the director unit of cruise branch of WTCF. Next, Shandong high-speed group integrates Binzhou port, Dongying Port and Weifang port to form Shandong Bohai Bay Port Group. Qingdao port and Weihai port will be listed and merged by Qingdao port. When conditions are ripe, Qingdao port, Bohai Bay Port, Yantai port and Rizhao port are integrated into a provincial port group.

⑤ Japan and South Korea enhance visa convenience

The government of Japan and South Korea actively promotes Chinese citizens to travel to South Korea for personal reasons and improves various visa services. These convenient visa measures make it more convenient for Chinese tourists to travel to Japan and South Korea by Cruise.

(2) Economic factors

① Attention of major cruise companies to the Chinese market

The international cruise market is gradually shifting from Europe and the United States to Southeast Asia, which makes the presidents of the world's four major cruise companies have full confidence in the future development of China's cruise industry.

② The growth of tourist strength in Shandong Province

Shandong's increasing consumption of education and culture, leisure and entertainment, tourism and health care, etc., has bred the demand for holiday leisure consumption. The growing consumption of local tourists is a solid market foundation for the development of cruise economy.

③ Transformation and upgrading: high-end port business

The United Nations Conference on Trade and development pointed out that at present, the world's ports are developing towards non loading and unloading services such as whole supply chain and ship leasing, and improving the level of port intelligence (United Nations, 2013). Shandong port is catching up with the development trend of the world port and striving to become a high-end industry.

(3) Social and cultural factors

① Change of tourism concept and diversification of tourism mode

At present, most people still actively welcome the development of cruise tourism, believing that the industrial chain formed by cruise tourism can promote the development of local economy and provide them with more employment opportunities (Pei, 2017). Jin (2016) pointed out that the level of China's national income has gradually improved, and the awareness of traveling and leisure has gradually increased.

(4) Technical factors

① Good interaction between port and city

Shandong's cruise port is located in the central city, realizing a good interaction between international cruise city and urban development. China's cruise ports have a good foundation in berthing capacity, functionality and reception capacity.

4.1.4. Threats

(1) Political and legal factors

① Security threats from conflicts in parts of the world

Because of the disputes between the two Koreas, Japan and South Korea, the Bohai Sea and the Yellow Sea have become the hidden dangers hindering their security development.

② Policies restrict foreign cruise companies

At present, China's policies prevent foreign cruise companies from setting up wholly-owned or holding cruise companies, and prohibit foreign-funded travel agencies from operating China's outbound tourism business; also restrict foreign investment from operating part of water transport routes.

③ Restrictions on customs clearance procedures

At present, China adopts general regulations on entry-exit management and port management, which results in too long entry-exit time for cruise passengers and inconvenient entry-exit port. When our people disembark in the middle of the domestic port by Cruise, they are deemed to enter the country, and when they return to the cruise line, they are deemed to re exit the country, and they must go through the exit formalities again (Zhao, 2013). This has a negative impact on the consumption of domestic tourists' cruise tourism products.

(2) Economic factors

① Developing cruise ports in surrounding countries

In the east of Shandong Province, the main port cities of South Korea and Japan, such as Busan, Osaka, Yokohama and Kobe, also have good software and hardware conditions for cruise home port.

② Excessive competition and insufficient investment in tourism development

Dalian, Tianjin, Shanghai, Shenzhen, Sanya and other international cruise home ports have been navigable one after another, becoming the competitors of Shandong international cruise home port development

③ Lack of relevant tourism products

At present, the products of cruise tourism are monotonous and expensive, and the initial understanding and acceptance of the cruise products by the citizens are insufficient. The quantity and quality of cruise products in Shandong cannot be compared with those in the world's cruise home port area.

(3) Social and cultural factors

① Differences in cruise consumption concepts between the East and the West

International Cruise tourists have a high enthusiasm for traveling to China, international cruise companies have a high enthusiasm for the Chinese market, coastal port cities have a high enthusiasm for developing cruise economy, and Chinese people have a low enthusiasm for cruise tourism consumption.

(4) Technical factors

① Resource consumption and cruise environmental pollution

Cruise ships have a large demand for materials, which may cause oil spills during operation or port connection, causing pollution to the marine environment and port environment. Noise may interfere with the living environment of marine organisms.

② Domestic cruise tourism competition intensifies

There are some new international cruise centers in China, most coastal port cities pay more and more attention to the cruise economy, accelerate the planning and construction of cruise terminals, all of which form a competition for the development of Shandong cruise tourism.

③ Threats to the development of international cruise tourism

With the rapid development of the world's cruise economy, Singapore and other international metropolises have infiltrated the elements of "cruise economy". Shandong's cruise tourism has experienced fierce domestic competition, but also been challenged by the development of international cruise tourism.

5. CONCLUSION AND SUGGESTION

5.1. Conclusion

This study summarizes the SWOT analysis framework of the above PEST factors, and establishes the SWOT-PEST analysis matrix of cruise tourism development in Shandong. In addition to the construction of dedicated cruise terminal as soon as possible, perfecting the relevant supporting facilities, the basis of Shandong

diversification, innovation should be encouraged to attract qualified international cruise lines or investment developers cruise home port development and construction, and take unified development pattern of the construction of the wharf and the surrounding areas, with other facilities earnings in its terminal yield, improve the enthusiasm of enterprise construction of pier.

5.2. Managerial Implication

In terms of management mode, it is suggested to introduce experienced cruise terminal operators through joint venture, so as to quickly establish a more market-oriented and international cruise management system. At the same time, we should also accelerate the training and introduction of cruise management personnel, timely development of cruise industry.

Tour operators should carefully investigate the target market of cruise tourism. Must be different from the general traditional tourism product design, planning, marketing and strategy. Tourists are mostly loyal customers who have higher feelings of return after participating in cruise tourism. Therefore, in the marketing of cruise tourism products, it is a kind of friendly trust relationship, and loyal consumers will become the most convincing word of mouth marketers because they establish long-term trust relationship with each other.

5.3. Limitations and Suggestions for Future Research

First of all, this study only investigates Shandong, China. However, we should take a macro view of China's overall cruise industry. Therefore, this study suggests that the scope of future research should be extended to the development of cruise tourism in China. Secondly, this study adopts PEST embedded SWOT analysis for strategy evaluation, which may still be too subjective judgment. There are still many methods of industrial environmental strategy assessment, such as five forces analysis and blue ocean strategy, which are recommended for future research.

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