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The adaptation strategies of the cruise lines to the Chinese tourists

Abstract

The cruise industry is growing internationally at an unprecedented rate and is a holiday tyoe that has now extended to Asia and China. China now represents a market barely significant in terms of market share, but is considered extremely promising in the future as sea cruises come into reach to Chinese tourists. The objective of this paper is to analyze the conditions of implementation of the companies serving China and to understand the strategies used to win customers in China. Three main points will be analyzed: the state of the market, the position and actions of the central and local governments in China, and finally, the adjustments made by the companies to attract a clientele for whom the product was unknown until a few years ago.

Key words: *implementation strategies; government policy; emerging market; Chinese tourists practices*

Introduction

The international cruise industry is growing at an unprecedented pace since it started to develop in the 1960s in the United States. After the Caribbean, this type of holiday has gradually extended to the Mediterranean, northern Europe and continues to expand in the Indian Ocean, Oceania and Asia. Chinese tourists are today among the newest customers and the East China Sea has become a basin in which to invest for the players in the cruise sector, which is dominated by American-based companies. The impressive thrust of cruise tourism in China, which resulted in the introduction of new high-capacity vessels, was prompted by a strategy of cruise lines to deploy their fleet world-wide.

Although China now represents an relatively small market with less than 200,000 cruise passengers, it is considered extremely promising as a future market for at least three reasons: 1) China is a huge market for international tourism, including cruising, with a population of 1.3 billion; 2) the Chinese government encourages the development of cruise tourism while at the same time maintain strong regulations (Nyiri, 2008); and, 3) cruise lines are looking for new destinations and source markets. The recent release of a Chinese film "If you are the one", in which main actors perform on a ship of the cruise company Costa, is indeed a sign that the sea cruises are becoming part of Chinese daily life.

The objective of this paper is to identify and analyse strategies that international cruise companies are using to win customers in China and, specifically to investigate whether the Chinese tourists have any specific requirements that operators must satisfy. Through the study of the emerging cruise market for nationals of mainland China (from People's Republic of China, excluding Hong Kong and Macao),

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our scope is to better understand how Chinese tourists utilize and construct the tourist space. The weight of the political pressure in a country under an authoritarian rule will also be emphasized in order to set in perspective the ability for the Chinese tourists to freely cruise abroad. Moreover, what is the place given by the Chinese central government to private foreign companies? Three main points will be analyzed: the state of the market, the position and actions of the central and local governments and, finally, the adjustments made by the companies to attract a clientele for whom the product was unknown until a few years ago.

Literature review

The state of the cruise industry in the world and in China

The cruise industry has grown rapidly world-wide. Asia, although it occupies a modest place, is no exception to this growth. The market is historically characterized by a dominance of the Caribbean Basin and the North American customers. The Caribbean Basin accounts for 37% market share (CLIA, 2011), but its growth is now lower compared to other areas, such as the Mediterranean basin. The Caribbean has many advantages, with a variety of destinations, the ability to navigate most of the year and location close to the North American customers. North Americans account for the largest market share worldwide, comprising 62% of passengers (CLIA, 2011). The Asian cruise passengers account for only 5.8% of the world market, or 1.09 million cruise passengers, which is weak against the 18.8 million cruise passengers worldwide in 2010 (CLIA, 2011). Throughout Asia, China figures as the emerging market. The first cruise ships have invested in this market six years ago and, since then, are experiencing a strong growth. Thus, in 2006, an estimated 10 thousand Chinese tourists boarded a cruise from mainland China (excluding Hong Kong, Macao and Taiwan) but, in 2010, the figure was 328,000 passengers departing from Chinese ports, while there was a total of 790,000 cruise passengers if foreigners making a stopover in China are included (China Cruise and Yacht Industry Association, 2011). We are therefore facing a new, fast developing cruise demand. The Chinese market benefits from the combination of two phenomena: the strong growth of sea cruising and also, as we shall see later, the development of tourism in China. According to a recent forecast (Peisley, 2010), the number of cruise passengers worldwide is expected to reach 31 million by 2025 and emerging basins will benefit from this overall increase.

The growth in demand was anticipated by cruise lines and they are making significant investments in building new ships. The renewal of the fleet does not only mean a quantitative increase in supply but allow companies to offer new tourist facilities and equipment on board vessels. Arrival of new ships in North America allows for deployment of older ones to new basins. Moreover, these new vessels have an enhanced capacity and sometimes an outstanding one, as the Oasis of the Seas and the Allure of the Seas (RCI) with a capacity of 6000 passengers. This type of ships is also requesting large scale port infrastructure to accommodate thousands of passengers and crew members.

Finally, it should be noted that the market is concentrated in the hands of a few companies, mainly American, whose growth is based on the acquisition of smaller companies. Three main groups share most of the world market. Carnival, the American group, largely dominates this sector with a fleet that has been enriched by its hundredth boat in May 2011. The group has a total of eleven companies operating in the U.S. (including Princess Cruises) and the European market (Costa, Aida, etc.). For Carnival, Royal Caribbean Cruises Limited is the first competitor: the group, also American, owns 40 ships. It shares the same strategy of having presence in major markets (RCI, Celebrity Cruises and Azamara Cruises for the U.S. market), Pullmantur and Croisières France (for Europe) and has a joint venture with TUI for cruises in the UK and Germany. The second competitor, Apollo Group, which includes three companies (Norwegian Cruise Line as the biggest and co-owned by Star Cruises), has not the commercial impact of the first two leaders. There are also two other companies with the same fleet size (11 boats) and a more local positioning: Mediterranean Shipping Cruises (MSC), an Italian company and Star Cruises, a Malaysian company, a branch of the Chinese group, Genting Hong Kong.

The presence of cruise companies in China is currently limited with only three companies in the basin. The two largest groups are Costa for Carnival and Royal Caribbean International (RCI), a branch of Royal Caribbean Cruises Limited. To these two major companies, we should add Star Cruises. Costa was the first company to have invested in this market in 2006 and is now the dominant company in China. The fleet positioned in China is currently small, with two (Costa Romantica and Costa Classica) ships of their total fleet of 16 vessels in 2010. Of their total fleet of 23 ships, the RCI, present since 2008, has only one ship, The Legend of the Seas, stationed in China. Finally, the Star Cruises, the smallest of the three companies, have only one ship, the Superstar Aquarius.

All of those ships are relatively old, built between 1991 and 1995. However, the good market response resulted in companies investing in renovating and upgrading these ships or replacing them with the newer ones. In 2012, for example, Costa will sail the Costa Victoria built in 1996, and upgraded in 2004, replacing the older Costa Classica. The capacity will be larger, since Costa Victorian can accommodate 2,400 passengers, or a thousand more than Costa Classica. RCI follows the same strategic vision and will position another ship on the market in June 2012 - the Voyager of the Seas with a capacity of 3,300 passengers. This boat will offer new services, such as a “main street” with shops open 24 hours a day, an ice rink, a climbing wall, a golf simulator, a mini golf and similar. This boat was at the time of its release in 1999, the largest cruise ship built to date. MSC, for the time absent from this market, is preparing its entry in 2014. Companies already operating in China increase their offer and this market continues to attract new competitors, including Chinese as we shall see later.

Academic literature focuses on the already heavily used cruise basins and has little interest in these new markets, with only few exceptions. Heung and Eungyu (2009), for instance, provided the outlines of the Asian market. Shen (2011) analyzed the arrival of this tourism product in China. More general analyses deal with some aspects of the industry in relation to general phenomena affecting the world of tourism, such as price sensitivity (Petrick, 2005) and yield management (Maddah, Moussawi-Haidar, El-Taha & Rida, 2010), or with the economy or the society more widely: globalization (Wood, 2000) or the McDonalisation (Weaver, 2004) or Disneysation (Weaver, 2006). These studies show changes consistent with broader trends but also underline the specificities of the cruise sector. The purpose of this article is not only be to capture the characteristics of the Chinese market but, also, to ascertain if such a market is merely a variation of the global offer or whether the Chinese customers develop specific needs the cruise lines are trying to respond to. To fulfill this aim, we must outline the political context in China where the Chinese Communist authoritarian regime has only recently allowed any kind of tourism development.

The Chinese international tourism: The political pressure

The number of outbound Chinese tourists is growing, but this is only a very recent phenomenon (Arlt, 2006). Apart from the travel of dignitaries of the Chinese Communist Party (PCC), few people were allowed to travel temporarily outside the Republic of China prior to the policy of the "open house" introduced in the early 1980s (Zhang, 2002). However, until the late 1990s, only those who were traveling on business or were joining official delegations (often funded by the government or a state enterprise) could then undertake some, albeit very restrictive, tourism activities in addition to their "business" tasks. But, with the economic boom of the late 20th century, the Chinese government has actually liberalized the practice of international tourism, first to Asia (Verhelst, 2003). In 2009, nearly 66% of the total Chinese outbound passenger flow was to other Asian countries (Hong Kong, Macao and Taiwan Excluded) (Wang, 2009).

Until 2002, according to the COTR Yearbook 2010, Chinese nationals were only allowed to travel to Asia, Australia and New Zealand. Hong Kong and Macao, at the time not part of the People's Republic of China, received Approved Destination Status (ADS) in 1983 and 1984 respectively. Autralia was first non-Asian country to receive this status in 1999 and New Zealand followed. The countries that received the ADS early welcomed most of the Chinese tourists. In 2007, the most popular were Singapore with 1.1 million Chinese tourists, Malaysia with 950 thousand, Thailand with 780 thousand and Indonesia with 230 thousand. The first three have signed a bilateral agreement with China before 1992, while Indonesia did so a decade later. Asia is also the continent that sees the strongest increase in the number of Chinese tourists. From 2002 to 2007, the number of Chinese tourists to Indonesia increased from 36 thousand to 230 thousand, an increase of 528.3. In 2008, 482 thousand 696 Chinese tourists visited Japan, an increase of 79.6% from 2002 (Japan National Tourist Board, 2009). At the same time, the number of Taiwanese tourists to China dropped 43.2% from 400,334 in 2002 to 227,586 five years later. We should probably see in this phenomenon the effects of Beijing's policy: no country that has recognized Taiwan as a state has been granted the ADS yet and the Taiwanese example illustrates the strong role of politics in the Chinese international tourism.

This is an example how the government of the People's Republic of China, while increasing the freedom given to its citizens continues to monitor and control their movement strongly (Nyiri, 2008) - the most distant destinations, the most subversive in a way, represent only a minority of Chinese international tourists, a part of which are the cruise passengers. The gradual opening, still slow, shows the safety net that the Chinese authorities implement in order to control the mobility abroad and inside China (Nyiri, 2010). For example, domestic tourism is much more developed than international (Taunay, 2009). Nearly 300 million Chinese tourists annually travel domestically although, similar to the outbound tourism, the government has continued to develop frameworks to control mobility (Nyiri, 2006), to build a sense of national identity (David, 2007) and this is done systematically at least from the early 1980s (Taunay, 2009).

The diffusion and adaptation of new models

The booming up of the international Chinese tourism raises the question of the adaptation of the products offered to this clientele that many tour operators are often struggling to capture. Some assume that these difficulties are due to specific expectations of the Chinese tourist population. Market research in Hong Kong have being conducted very early (Chow, 1988) to identify how best to target the needs of mainland tourists when in Hong Kong, their specific desires in terms of hospitality (Zhang & Lam, 1999), food and beverage (Law, To & Goh, 2008), shopping (favorite brands) and willingness to spend (Heung & Cheng, 2000), but also activity pattern. The most recent articles focus on the evolution of more "individual" forms of travel by tourists from the continent having more facilities (a visa is no longer needed for stays of less than a week) to travel to Hong Kong (Li & Cai, 2008).

More generally, the very concepts of model distribution and production are under question in the case of international tourism in China. Some linguists for instance already showed that the spread in the world of Western languages did not result in a standardized model but in a melting pot of invention, *creolization*, which gave birth to new languages incomprehensible to the European invaders (Hagège, 1985). In opposition to the generally accepted theories, globalization is not a standardizing factor, but instead contributes to the invention of new models, which is based upon the heterogeneous ways the populations that are themselves diverse are able to absorb external phenomena (extraneity) (Pickel, Taunay & Violier, 2011). Because cultures are characterized by their very discontinuities (Babadzan, 2010), the integration of diffusion phenomena related to the implementation of the world system is necessarily varied, and does not give birth to one universal model, but to a plurality of new archetypes, arising from the intrusion of external representations and practices, the resistance of some local customs, and the syncretism with some other ones, in tune with voices that will reflect the local particularities (Pickel et al., 2011).

In short, our question here is how the cruise as a "product" is being adapted to the Chinese tourists. This is a most relevant issue: the international tourists in China and the Chinese domestic tourists do not have the same practices (Taunay, 2011). Some of the Chinese tourist practices are unknown in the West, such as red tourism referring to visiting attractions related to Chinese communism (Li & Hu, 2008), and there is an urgent need for knowing better the practice of Chinese tourists cruising from mainland China. In this sense, does the practice of (sea) cruising correspond with the practice of the tourists on-land? The main motivation for inbound travel in China is a desire to visit the country's major cities, especially those that are international symbols of China, with the modernity and progress that they stand for and coupled with a sense of national pride. Shanghai is the archetype of these motivations: the city represents the world in China and China in the world. The modern urbanity is signified with multicolored lights everywhere, which leads many observers outside China to consider Chinese tourism to be "kitschy". In reality it is the opposite. Chinese take their journeys to these cities very seriously, while their notion of beauty is derived from the cities' modernity - "it's beautiful because it is modern." The Chinese tourist attitude also leaves little room for the question of true and false, authentic and artifice. Deference to the building architecture is smaller here than in the West as the Chinese tourist looks for enjoying the experience of modernity rather than for "authenticity". Chinese tourists are also looking for the lively ("renao"), that is to say places "re" (hot, warm), and "nao" (noise, liveliness, agitation). The synthesis of two ideograms produces the word "animated" which means first "a place to live," and then "which relaxes the mind, making merry." Urban spaces in China, with their crowds and their on-going activity, fit this quest.

One reason for this behavior is that everyone can not yet afford to visit the most famous sights. Therefore, if one has the opportunity to engage in this activity, one gains more social prestige, or "face".

Another aspect of Chinese travel behavior and related to social status relates to the need to maintain pale skin color. In this society, by now predominantly urban (51.27% of the population 2010), pale skin color is considered a status symbol as it must at all costs be kept on showing that one comes from the privileged classes, especially among women. For this reason, along the country's main beaches, tourists prefer to sit at a table covered by a thick sunshade. Thus, it follows that the Chinese tourist motivations and behavior are different from the "model" known around the world. Sociability, modernity (expressed in the use of beach equipment and the care for pale skin color as a distinction) are at the heart of Chinese tourist practices. Is it the same with sea cruising?

Methodology

Conducting an analysis of Chinese cruises is not easy. As it has been mentioned, the number of tourists who choose this practice is still very small, less than 200,000 individuals in 2010. In addition, it is very difficult to know exactly the profile of cruise passengers, which complicates a quantitative analysis, especially if we include quota sampling. A quantitative survey with random sampling is also impractical, because of the different existing products and the difficulty to balance the weight of each; cruise lines do not disclose this statistical information yet. Having any information on neither the profiles of the cruise passengers or the products they prefer to buy, a quantitative analysis is impractical, as long as the market is not democratized.

Therefore, our methodology was to qualitatively analyze the social, spatial (the cruise tourist practices) and political realities (the political pressure and the strategies of the cruise lines). With regard to tourism practices first, observation was a tool widely available. As part of a partnership between the University of Angers (France) and Ningbo University (China), we were able to benefit from contacts that allowed us to become "mystery customers". Accompanied by a Chinese student who did her master's thesis on the theme of cruises in China in August 2011, we spent one week on board RCI's ship travelling to Japan. Besides the many photographs, this work has allowed a better understanding of the tourism modalities at work in the social and spatial practices in China. Among the five well-known elements of tourism - discovery, rest, play, socializing, shopping (Team MIT, 2011) – which ones are indeed the most represented here? What are the expectations of the Chinese tourist given that they for so long have been as sharing the mental representations of a society and culture that is viewed as "other" (Jullien, 1993)? Specifically, we conducted a detailed analysis of the various activities in different parts of the ship, each of them corresponding to an activity (the bar and the show room for socializing, the casino area for the play, etc.). These observations were repeated several times a day, every day during a week. A final report was submitted to the client and, to ensure confidentiality, only selected results are published here.

The second tool used was qualitative semi-structured interviews. In total six interviews were conducted in 2011 with sales managers of the cruise lines (tour operators), with representatives of the official tourism organization (Tourism Bureau Shanghai) and strategic managers for the group Costa Cruises. Each of these interviews was twofold. The objective was to understand the tourist practices and to better know the fringe of the population that experienced the cruise. The second part of the interview was to measure the weight of the political pressure on the actors in developing an "independent strategy".

Above all, what are the links to forge with different state officials and at what level of government? In a country still very authoritarian, these issues are delicate and the response very moderate. Finally, our data on tourism practices were crossed with the results of the observations and an attempt to analyze the weight of the political pressure was initiated.

The results: Transposition of the American model or adaptation to Chinese customers?

The position of the Chinese government

In China political power is concentrated in the hands of the central government. Therefore, the growth of Chinese international tourism cannot be separated from the central government support. Local governments (provincial and municipal authorities) only execute the instructions sent by the central authority. Tourism is, since 1986, at the heart of the country economic development policy, but the Chinese government has only started to relax its control of foreign investors in 2009. In 1996, foreigners were allowed to invest in China, but only through joint ventures with Chinese state-owned companies. In addition, only companies that had an annual turnover of more than 40 million had that right. Two years after China has joined the WTO (World Trade Organization) in 2003, the law changed slightly, with foreign investors winning the right to set up their own company in the Republic of China. However, this privilege was restricted to a handful of companies. Tour operators, for example, had to make annual sales of a minimum $ 500 million outside China to have the right to set up a company in China. In 2009, this figure was reduced to $ 10 million, but the business of international tourism is still a monopoly of the Chinese government. The cruises, being a part of the international tourism, most likely needed to win the support of the State, as no foreign company can establish itself in the country without it. Although China has neither a national cruise company nor even cruise ships, the country relies on foreign investors, first of which were Costa Cruises, which explains the near-monopoly of that company today.

The development of cruise lines with a home port in China is very recent, as is the outbound tourism in general. In 2006, there was no port infrastructure, but only "Development Plan for coastal ports in China" with a primary aim to build port infrastructure. Two years later, in June 2008, the government declared "directions on the development of the cruise industry in China," intending to create a real cruise market and offer cruise products to Chinese market. Annual reports are published since 2008 on the development of the cruise industry in China. On 25 March 2009, the Council of the Internal Affairs has also declared the need to promote and standardize development of the cruise industry. On October 19th of that year, the Ministry of Transport and Communications has officially confirmed that foreign cruise lines could make one or more stopovers in the terminals of the country, after receiving the government approval. Finally, in 2011, development of the cruise industry has even been included in the 12th Five Year Economic and Social Development Plan (2011-2015). The cruise industry has become one of the important issues for the development of the Chinese economy.

Short cruises on the program

The cruise industry, as we have seen, is strongly marked by the United States: the majority of the customers are from the States and they are the first to have enjoyed this product. The main market is also made of Americans, even for cruises departing from China. Some markets difficult to conquer were subject to strategies different from the development strategy in the U.S. For instance, it was the case of the European market and more specifically France, where the departure rates were below the European average (European Cruise Council, 2009). For the European customers, with a strong interest in sights with cultural significance, the "cruise to nowhere" products as they exist in the Caribbean in which the passenger seeks above all relaxation and fun ("Fun Ship") do not work well. Moreover, the French customer is not attracted by an international context, but is instead attached to an environment where French is spoken and French products (food, music) available. American groups, with their branches in Europe, have reacted and proposed cruises that are "100% French." The question that arises is whether the cruise companies have adapted in the similar manner their products to the Chinese market and on what basis.

The first phenomenon to note is the reduction of the duration of the cruise, although this trend is reflected in other markets where these cruises always coexist with cruises of longer duration, ranging from one week to several weeks. In China, the average is 5 days, 4 nights on board, but some offer a single night on board. Cruises over a week do not meet the expectations of the Chinese customers and are rare in the companies programs. Where they exist, they are rather designed for the international clientele: RCI and Costa offer cruises of this type, while Star Cruises specializes in the Asian market only offers short cruises. The comparison of the offer for the American (RCI) or European (Costa) and Chinese customers shows these differences, since the longer sailings only appear in the catalogs bound for the U.S. or the European customers.

The adjustment of the duration of the cruise is an adaptation to the labor law and, in particular, the lengths of the paid holiday. The clients consist primarily of employees (63%) of which 89% have a monthly salary between 5,000 and 6,000 yuan (US$ 800 – 950). These employees travel mainly with a spouse and children or as a couple because the cruise conveys the image of a romantic trip for young couples. There are also older couples who have generally received the cruise as a gift from their families. Unlike other markets, this product is not reserved for elderly clients as it has long been the case in Europe. Employees have four days off spread over the year (1 May, the Feast of the dead in early April, the Dragon Boat Festival in June, the Feast of Mid-Autumn Festival in September) and "two golden weeks" (Spring Festival in January and National Day on October 1). The four days off can bring the opportunity to make a mini-cruise by combining the holiday with the weekend, but it is the "golden week" that will be most conducive to the cruise. There are also a large number of scheduled cruises around October 1. The programming of the cruises thus takes into account such time constraints.

Offering short cruises also has the advantage of making it financially more affordable. Among the companies present in China, the most affordable rates appear with Star Cruises with a starting price of 700 yuan ($ 110) per person. This price is mainly due to the short duration of this cruise (one night on board). Costa sets its prices between 2,399 yuan and 10,000 yuan (between US$ 380 and 1,600), depending on the choice of cabin and length of stay. Finally, the most expensive services are offered by RCI with prices starting at 3,400 yuan (US$ 540). However, we should put these prices under perspective, since for such products prices vary depending on a number of parameters (duration of the cruise, cabin type mainly) but they also fluctuate depending on special promotion and discounted rates for some cruises. The Chinese market is not immune to promotional practices: for example, the companies offer free travel for children staying in the cabin with the parents or other forms of promotion, linked to economic events, such as the nuclear disaster in Japan that has led the cruise companies to reduce their prices dramatically, sometimes up to 50% off the advertised price.

To make cruising attractive

Beyond the time and financial constraints the cruise companies are faced with another issue, which is to stimulate the desire to make a cruise. If tourism is relatively new in China, sea cruising is an even more recent phenomenon and Chinese tourists are not familiar with this product. Thus, the population has to learn about this product, and industry association has taken up this role. In much the same way as it was done earlier by cruise industry associations in America and Europe, the main objective of the China Cruise and Yacht Industry Association (CCYIA), is to make China the leading cruise destination for international cruises However, unlike its American and European counterparts, the CCYIA's objective is to educate Chinese market about the cruise product and experience. This is then taken up by companies, such as Costa, whose ultimate goal is to popularize a new form of holiday in China. The promotion of the cruise is based on the valuation of two images: the image of the family holiday designed for the couple and their child (related to the one-child policy) .

Once on board, the efforts to teach and to seduce customers continue. The world on board is codified and some "rules" must be explained to the passengers with signs translated into mandarin Chinese or by the presence of a guide speaking English allowing the interface between the tourists and the crew of which few members speak Chinese. The companies are attentive to this and the number of crew members of Chinese origin is on increase. The team needs to make effort to engage passengers in cruise activities. The director of the Chinese market for Costa said that to motivate the participation of Chinese customers, the team of Costa Cruise had to knock on the cabin door after dinner to invite customers to participate. This concern is also found in RCI, which offers a wider variety of tailored onboard products to Chinese guests, including more Chinese language services, authentic Chinese food, culturally appropriate recreational activities and duty-free items.

To meet the needs of these customers, the companies have made adjustments. The boats are relatively old and they are subject to a greater or lesser renovation which allows changes in the arrangement of the ship. Thus, Costa spent 12 million Euros on the Costa Allegra (first ship to be positioned in Asia) to remove the sunbathing area, dedicate more than 50% of the space for shops and to reorganize the spa area. Chinese cruise passengers regularly frequent the casino, enjoy the pool, but abandon the gym thinking that it is a waste of time on a cruise. This actually corresponds to the taste of Chinese tourists for lively atmospheres (*renao*). The heart of the cruise is entertainment, gaming. This is the main expectation on board: 36% of Chinese customers are looking for fun (animations, games), only 7% value above all luxuriously decorations and only 4.6% are seduced by the gastronomy (Yu, 2011). The gastronomy again shows a difference in perception between Americans, Europeans and Chinese. The latter give a small importance to the quality of the food. While this is an element of utmost importance to judge the quality of the cruise for certain nationalities (the French especially), the Chinese do not regard food and beverage quality as essential for the success of the cruise. The cruise does not represent the opportunity for changing eating habits and Chinese passengers prefer Chinese food to a cuisine that will be more international or related to the company country of origin.

Two major attractions are important for the Chinese customers. Firstly, gaming in all its forms, including traditional gaming such as mah-jong that can be played in rooms reserved for this purpose, games organized by animation teams and the casino. The opportunity to gamble when sailing is a real attraction and competes with places such as Macao, where the gambling is allowed unlike in the rest of the country. Shopping is another favorite activity, whether performed during excursions ashore or on board. For the tourists, shopping is as important as is discovery of natural and cultural sites.

The commercial development on ships is a huge resource for cruise lines. According to Cruise Market Watch on-board sales represented approximately 25% of sales for the companies in 2011. On vessels operating in the China Sea, we find both the presence of American and Western brands, but also the equivalent of the shops that are flooding the commercial supply in major Chinese cities such as the sale of beads per meter. Conversely, the attraction for sunbathing and swimming is limited. The relation to the body and the sun is different from the Western sense that values tanned skin. Chinese women prefer a preserved skin from the sun and sun bathing areas are therefore rarely used. Water is also an element that the Chinese are unfamiliar with (Taunay, 2011): water is appreciated in a contemplative way, while most Chinese do not swim. Figure 1 shows young swimmers for whom learning how to swim is much easier than to the older generations, whose contact with water is secured with a buoy although the water level is low. Thus, there is an import of American and European models and an adaptation to the needs of Chinese customers.

Figure 1
Youngster learning swimming

Conclusion

This article shows that the cruises departing from China for Chinese customers is a very recent phenomenon, we may say an emerging phenomenon. The Chinese government took into account this new activity in the second half of the 2000s, especially within a framework of economic development. In fact, there would be no cruises in China without the approval of the central state, which promotes and selects companies to enter the market. The same applies to the countries that have to be authorized (ADS) by the State Party in order for Chinese citizens to be allowed to travel there. The analysis shows that the expectations of Chinese tourists choosing to make a cruise differ from that of the Americans or Europeans. Especially, the element of fun is much more pronounced and spaces for relaxation disappear almost entirely of ships plans designed to welcome Chinese tourists. Socializing is more important than the need to care for oneself.

Cruises, however, remain a product for privileged customers in China and we cannot generalize from these conclusions to the description of the Chinese tourist practices on the whole. The same remark should be made for the understanding of the dissemination and adaptation logics of such a practice. Cruises in China are still at their starting point, the first stage of their evolution. Changes that we have still to put under observation and for which we assume that they will continue to differ from the already well-known models: at least for a while.

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