

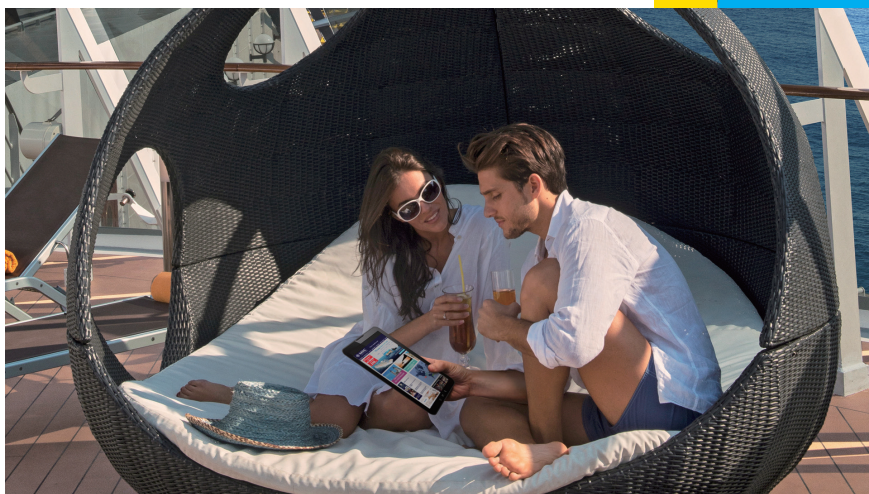
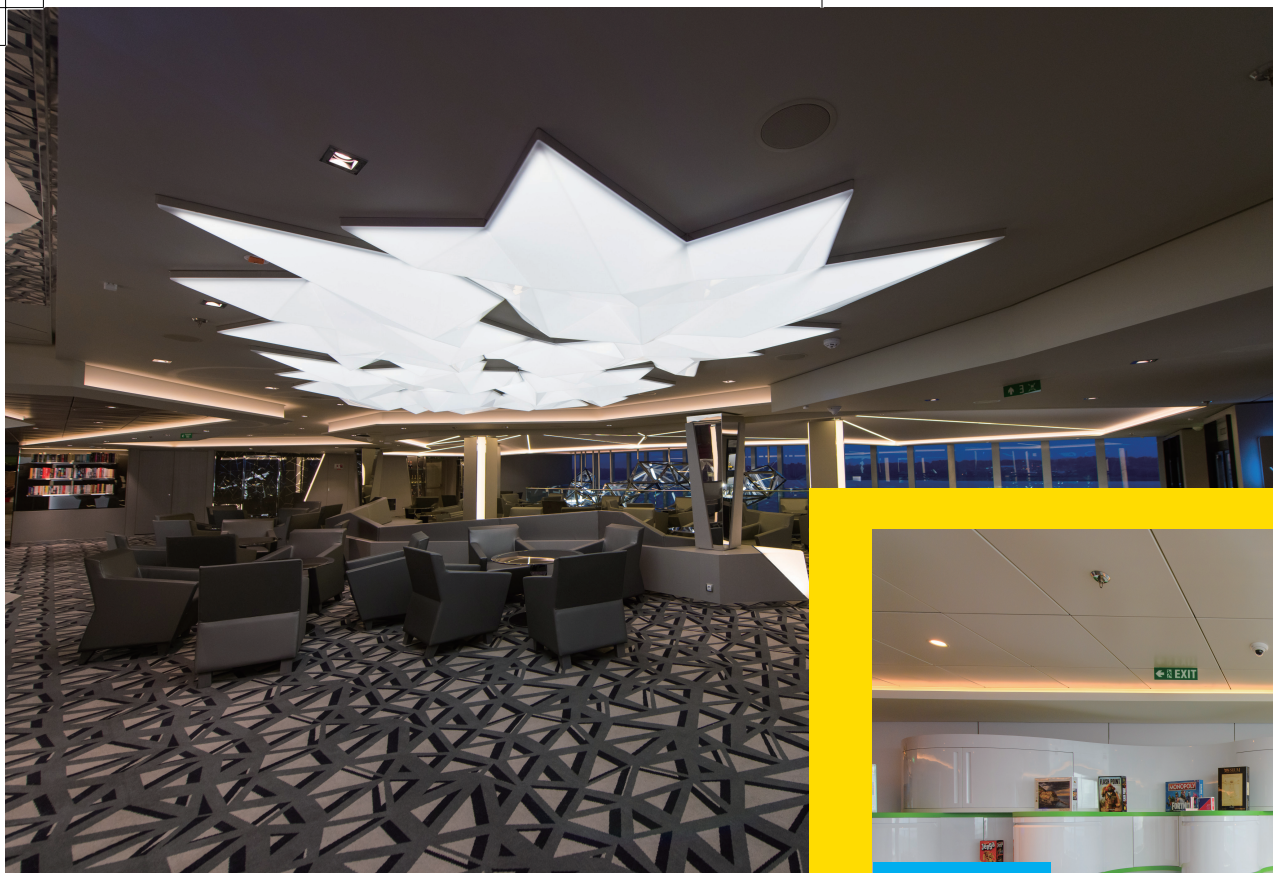


新船变阵 或助邮轮业 走出阵痛

文/赵乾坤 图/全景



过去七八年内，中国邮轮产业曾保持了在其他行业罕见的高增长率。但高速增长也导致问题频出，如市场的低渗透率、价格战愈演愈烈、分销渠道屡遇瓶颈、岸上游同质化等，倒逼邮轮产业进入调整期。在经历了游客增量速持续性放缓后，我国邮轮产业在 2018 年旅客量最终还是步入下降通道，整个行业也进入“寒冬”。而云顶邮轮旗下星梦邮轮却在 2019 年年初率先在中国市场部署新船“探索梦号”，打响了“破冰之战”的第一枪。之后，随着新船——歌诗达邮轮“威尼斯号”、皇家加勒比游轮“海洋光谱号”在中国母港的悉数登场，以



“为中国市场量身定制”又是否真正满足了经历“阵痛”之后、进入调整期的中国市场的所需？本文将围绕这些话题展开探讨。

云顶邮轮：调整期是市场优化的产物，创新是产业突围利器

在云顶邮轮集团市场部主管、高级副总裁李凤霞看来，中国邮轮产业在过去两年的确经历了增速放缓甚至下降的阶段，但这并不是指中国邮轮市场已经走到高点而后开始走向衰退，而是说，在经过十年从无到有的爆发式增长之后，

及 2020 年 MSC 地中海“荣耀号”，以及 2021 年星梦邮轮“环球级”邮轮的进驻，中国邮轮市场是否能从“疲态”中走出？而新船在航线、目的地、销售模式上会有哪些“变阵”？新船上所谓的

市场要转入一个更为全面、更具深度的发展期。“而在这之前我们首先进入的是一个健康的调整期，这是新兴邮轮市场进一步发展前的一个阶段。”

作为中国邮轮产业走过调整期后迎来的第一艘新邮轮，云顶集团旗下星梦邮轮第三名成员“探索梦号”于今年 4 月在上海首航，这一新船将为云顶旗下将于 2021 年初下水的 20 万吨“环球级”邮轮打下良好的市场基础。而“环球级”邮轮的特点也已在业内引起关注，据李凤霞介绍，该船部署于华东、华北市场，将成为亚洲最大的母港邮轮，同时也是造船史上技术含量最高的人工智能邮轮。

云顶近年来对新船及相应产品的打造都融入了创新和个性化的设计观念和智能化的发展理念。新近下水的“探索梦号”在春夏期间以上海及天津为母港，推出了系列长短不一的日本航线。秋冬期间则将迎合市场对海外长航线的需求，

城市旅客邮轮旅行经历日渐丰富，预计空海联航需求将会与日俱增，而今冬“探索梦号”由悉尼或奥克兰出发的全新航线的推出也正是为了顺应这一需求。到2021年，“环球级”邮轮也将带来系列全新海外长航线。

MSC地中海邮轮：定制化让国际品牌落地，智能互联打破产业边界

提到中国游客在邮轮旅行时的主要诉求，MSC 地中海邮轮大中华区总裁黄瑞玲指出，一般来说，宾客主要有三个方面的诉求，也是通常造成“大排队”的主要原因——即信息查询、行程预定以及账单结算。“而地中海邮轮在近年来华新船上配备的独家科技——‘MSC For Me’智能邮轮计划、便利的移动终端设备以及支付宝和微信等多样化的支付方式，可以创造智能互联的邮轮体验。”如，游客可以通过“MSC For Me”智能邮轮计划获得精确导航，迅速获知最新活动信息和日程安排，从而进行更合

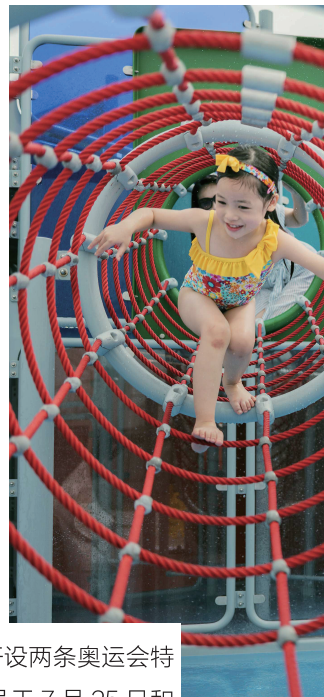
理高效的行程规划；还可利用“MSC For Me”智能邮轮计划登记入住并提前预定自己想要参与的活动，节省等待时间；可以更便利地在邮轮上通过终端结算设备进行账单结算。“此外，为了更好地满足中国宾客的移动支付习惯，我们与支付宝合作，成为全球首个全船队覆盖支付宝服务的国际邮轮品牌，之后又进一步开通了微信支付功能。”值得一提的是，在新一代旗舰邮轮地中海荣耀号上，每间客舱还配备了全球邮轮行业首个智能语音私人助理 ZOE，可提供包括中文在内的7种语言智能化服务，回答邮轮相关的数百个问题，并提供船上服务指南、协助预定服务等。“ZOE 的到来将进一步减少‘大排队’的现象，提供更丰富、优化的智能邮轮体验。”

除了智能化外，MSC 地中海邮轮还在邮轮产品定制化上不断深耕。如，在发现“多代出游”成为中国游客邮轮旅行的一大趋势时，MSC 地中海邮轮在尽可能保留原汁原味的欧式邮轮体验的同时，在将于明年到来的新船——地中

转港至澳大利亚及新西兰，提供每周由悉尼或奥克兰出发的全新母港航线。这是云顶邮轮了解到中国成熟邮轮度假客对远程度假地关注激增的消费习惯后的一次创新尝试。在销售模式上，云顶邮轮集团一直坚持自主分销和科学定价策略，形成了以“散卖为主、团队为辅，以中国特色的会议奖励旅游进行补充”的新型营销模式，并根据库存和市场消费情况制定及时的市场营销策略。在未来销售模式的探索上，李凤霞坦言，“环球级”邮轮最高载客量可达9000人，届时的销售情况会更为复杂。“我们将不断加强在直销端的投入，并开拓更多企业客户，更深、更广地挖掘客源市场。”

而提到新船上的设施和设置，作为最早进入中国开展邮轮业务的邮轮公司，云顶邮轮已在中国邮轮市场深耕25载，深谙中国消费者的个性和需求。这可以从以下几点看出，第一，为满足中国旅客，特别是高净值人群，追求更个人化、更高私密度的旅游产品的消费个性，云顶特以“船中豪华船”概念打造了“The Palace 皇宫”贵宾专属区，为旅客提供一价尽享式私享尊贵体验。相关数据显示，“环球级”邮轮的“The Palace 皇宫”贵宾专属区域将拥有151间套房。第二，针对邮轮消费渐趋年轻化的趋势，“环球级”邮轮拥有丰富的休闲、娱乐、餐饮设施，包括主题乐园内配合虚拟现实科技的过山车、电影院、亚洲及西式水疗等。同时，云顶邮轮还针对年轻人市场通过与电影IP、游戏IP、时尚品牌合作等方式打造主题航次。第三，随着中国沿海





海荣耀号上进行了一系列定制化的“改造”，对亲子活动、餐饮、购物、娱乐设施等方面进行了中国本土化调整，以满足不同客群的差异化需求，如可连通的家庭舱房、与世界著名品牌乐高和婴幼儿用品专家智高推出的儿童游乐区和儿童娱乐项目、与亚洲星厨梁子庚合作开设的火锅餐厅、与“太阳马戏”独家合作的全新原创剧目等。

皇家加勒比游轮：优化不是本土化

2019年是皇家加勒比国际游轮进入中国市场的第十年。今年6月，皇家加勒比将旗下新船——超量子系列首艘邮轮“海洋光谱号”部署中国母港，皇家加勒比国际游轮亚洲区主席刘淄楠指出，此举是希望能用一系列的科技创新与服务升级，为中国游客带来邮轮旅行的“超

量子时代”。

众所周知，皇家加勒比的船通常体量较大，这赋予了娱乐、餐饮设施更多空间，但同时大体量的船也将让“大排队”问题更加棘手。对此，刘淄楠表示，对于这一情况已有进一步优化，如新码头实施了不同交通工具的分流规划和皇家电子登船证等。目前，皇家已推出行前服务，使宾客在行前便可规划、预订船上活动及岸上行程。并开发了全新的Royal APP，帮助宾客管理和计划海上之旅，而在新船“海洋光谱号”上，住客还可通过这一APP来控制舱房内的多种设施。在岸上观光线路拓展、航线开拓方面，皇家加勒比专注于美食游、亲子游、探索游这三大特色产品的开发，“2020年皇家加勒比于中国母港出发的过夜深度游航线数量将较2019年增长达1.5倍，为消费者深度探索目的地提

供更多可能。且还将开设两条奥运会特别航线——海洋光谱号于7月25日和8月2日的上海出发航次将在夏季奥运会期间造访东京并过夜。”

刘淄楠将当下这一阶段定位为邮轮消费的2.0时期。他指出，当下，中国邮轮游客的特征包括两个方面：一是对新鲜产品和活动的尝鲜心理；二是一些成熟邮轮消费者追求深度体验。基于此，新船光谱号不仅引入以VR科技创造冒险体验的“南极球”，还特别推出川菜料理“川谷荟”，并优化游客在码头的行前体验。在新船硬件产品优化方面，刘淄楠强调，皇家加勒比的策略不是本土化，而是优化。“这就是为什么在皇家游轮上诸如北极星、南极球等都是首创性体验。这样的话，中国邮轮市场将可持续发展。这种发展不仅对邮轮公司有利，也将造福中国消费者。”



未来，部署中国的新船有哪些特征？中国邮轮产业将走向何方？



李凤霞

云顶邮轮集团市场部
主管、高级副总裁

李凤霞：未来，部署中国的新船将更加智能化、功能化、定制化、品质化，而不是一味地强调越大越好。鉴于目前邮轮旅游的渗透率在中国还不够高，初次乘船的旅客倾向选择大船、新船，相信大船在未来一段时间内仍会是消费主流之一。但随着邮轮消费的趋势完成从

沿海向内陆的渗透，多次乘船旅客人数显著增长，邮轮旅游的真正价值被更多人所认知，相信彼时，在迎合大众市场的大型邮轮之外，也会有更多中型邮轮进入市场，可以满足那些追求休闲舒适的高端度假旅客的需求。此外，走过调整期后的中国邮轮市场将进入新的纵深发展通道，从航线产品优化、市场纵深拓展、产业结构升级以及经济影响深化各方面实现深入发展。



刘淄楠

皇家加勒比国际
邮轮亚洲区主席

刘淄楠：中国市场仍需优质全新的邮轮刺激市场发展，但对于新船来说，大不是消费者追求的唯一方向，大只是赋予了邮轮承载更多娱乐设施的基础，这是一个先决条件，消费者还是要看船上承载的环境、设施、体验是否能够满足他们的期待。新船是未来的趋势之一，科技化、智能化和家庭出游同样也是，皇家加勒比对中国邮轮产业一直非常有信心，一直坚持把最好最新的邮轮产品带给中国市场。未来，皇家加勒比会不断加大对中国市场的投入，会把更好的邮轮产品及地道的国际邮轮氛围带到中国。在2020年中国航线部署中，

皇家加勒比船队将提供覆盖27个目的地港口的约130个岸上观光精品游线路。



黄瑞玲

MSC 地中海邮轮大
中华区总裁

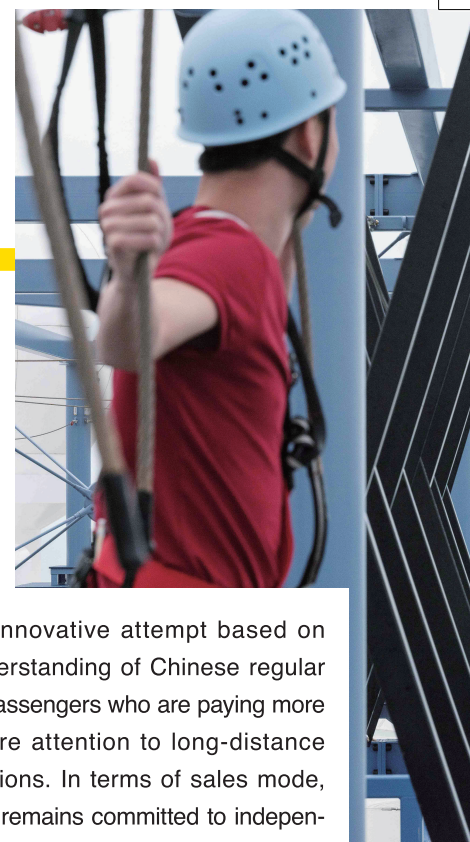
黄瑞玲：作为舶来品，邮轮在进入中国市场后，带来了最优质的硬件，并且软件方面也在不断根据中国宾客的消费习惯提升。近年来，邮轮新船在向着越来越大的方向发展，邮轮越大，意味着越能提供更大的活动空间和丰富体验，但是，我们相信，“大”不完全是制胜点，品质才是一个品牌获得市场和消费者认可的首要因素。故此，我们希望能够保留原汁原味的欧式奢华邮轮体验的基础上，通过不断优化和改进，提供满足中国宾客消费习惯的个性化服务。未来，二三线城市及内陆城市的市场潜力仍有待发掘，将有越来越多的家庭和团队愿意尝试并喜欢上这种旅行方式；而依据成熟邮轮市场的经验，中国邮轮市场将愈发走向大众化和成熟化，复购率和回头客也将随之增多。但需要注意的是，中国的分销渠道目前还比较窄，拓宽分销渠道、共同进行邮轮文化的普及和传播是整个行业努力的重点。



New ships may help cruise industry rise up again

Article/Zhao Qiankun Image/Quanjing

In the past seven or eight years, the cruise industry in China has maintained high growth rate that is rare in other industries. And yet, the problems that high growth rate generates start to emerge, such as low market penetration rate, fierce price war, intractable market channels, and homogenization of shore excursion, which in turn makes the industry enter a stage of adjustment. After continued slowdown in the rise of tourist number, Chinese cruise industry declined in terms of tourist volume in 2018, hence the grim market. Luckily, Dream Cruises, under the Genting Cruise Lines, takes the lead in deploying its new member "Explorer Cruise" at the beginning of 2019 in China, injecting momentum into the bleak market. After that, followed by the homeport appearance of Costa Venezia, and Spectrum of the Seas owned by Royal Caribbean Cruises in China, and the entering of MSC Splendid in 2020 as well as Dream Cruises new Global Class cruise ships in 2021, could China ride out the sluggish market in cruise? And what changes could the new vessels make in itiner-



ary, destinations, and sales modes? As for the principle of "tailored for the Chinese market", can the new vessels really satisfy the needs of Chinese market that has suffered from pain and entered the adjustment stage? This article will have a discussion on these topics.

Genting Cruise Lines: Adjustment is the result of market optimization, whereas innovation is the tool for industry survival

Li Fengxia, Director of Marketing Department, Senior Vice President of Genting Cruise Lines, argues that Chinese cruise did go through a slowing or even declining growth, but it does not mean that Chinese cruise market has climbed to the top and will go through recession. On the contrary, the market, after a decade of explosive growth starting from scratch, will transform into a more comprehensive and in-depth growth. "Before that we should first go into a healthy recalibration period, a stage before the emerging cruise market obtains further development."

Genting Cruise Lines welcomed the third

member of its Dream Cruise with an inaugural deployment of Explorer Dream in April, Shanghai. Explorer Dream is the first newly-launched cruise ship of the post-recalibration period in Chinese cruise industry, laying a solid market foundation for the 200,000-ton Global Class, set to debut in 2021. People in the industry pay close attention to the features of the Global Class. According to Li Fengxia, with deployment in Eastern and Northern Chinese market, it will become the third largest homeport cruise in Asia as well as the most technologically advanced artificial intelligence cruise ship in the history of shipbuilding.

In recent years, Genting has applied innovation, individualized design and intelligence concept to its new ships. The newly-sailing Explorer Dream, with homeport in Shanghai and Tianjin during spring/summer with a selection of voyages of various durations from Shanghai or Tianjin to Japan. In order to cater to the needs of long-distance overseas routes, Explorer Dream will transfer to Australia and New Zealand in autumn/winter, offering brand new weekly voyages departing from Sydney or Auckland.

It's an innovative attempt based on the understanding of Chinese regular cruise passengers who are paying more and more attention to long-distance destinations. In terms of sales mode, Genting remains committed to independent distribution and scientific pricing, and works out a marketing mode that is "retail as the main and wholesale as the subsidiary, and supplemented with incentive travel with Chinese characteristics." In addition, we will make timely marketing strategies based on stock and consumption in the market. As for future sales mode, Li Fengxia says, "as Global Class ships are able to accommodate up to 9,000 passengers, it will be more complicated to carry out marketing work. So, we will strengthen investment in direct selling, and increase our customer base by extensively exploring passenger source."

When it comes to the facilities and settings of the new ships, Genting Cruise Lines, as the earliest cruise company devoted to cruise business in China, has devoted to cruise for 25 years in China and deeply understands Chinese customers' individual needs in terms of the following aspects: First, in order to satisfy the personalized, private consumption needs from Chinese tourists, especially high net worth individuals, Genting, guided by the concept of "luxury cruise", creates "The Palace" VIP exclusive area, offering tourists valued comprehensive experience with one-off price. According



to relevant data, "The Palace" VIP exclusive area of the Global Class cruise will offer 151 suites. Second, given a growing trend of consumption among the youth, Global Class cruise owns plentiful amenities, including a theme park equipped with roller coaster, cinema, asian spa and western spa, all built with virtual reality technology. At the same time, Genting creates theme voyages by cooperating with IP films, IP games, and fashion brands. Third, as Chinese tourists in the coastal cities have an abundance of cruise experience, the need of fly cruise is expected to increase, hence the brand new voyages of Explorer Dream departing from Sydney or Auckland this summer. By 2021, Global Class cruise will launch a selection of new voyages of long duration.

MSC Cruises: Customization helps international brands settle down; connected intelligence breaks through the industrial framework

As for the requests of Chinese tourists during cruise voyage, Huang Ruiling,

president of MSC Cruises Greater China, pointed out that passengers usually have requests on three aspects, which is the main reason of "long lines" – information inquiry, itinerary planning and bill payment. "But our special technology 'MSC For Me', an intelligent project equipped on new cruises for China in recent years, convenient mobile terminals and diversified payments like Alipay and WeChat Pay, can create intelligent and interconnected cruise experience", said Ms. Huang. In detail, passengers can use "MSC For Me" to get accurate navigation, obtain the latest activity information and schedule quickly, so as to make itinerary plans more efficiently. Besides, passengers can check in and book the activities they want to join in advance, saving a lot of time, and they can also use terminals on the cruise to pay the bills. "In addition, to meet Chinese passengers' need of mobile payment, we have partnered with Alipay and become the first international cruise brand that achieves full coverage of Alipay service on every cruise, and later we have also integrated WeChat Pay", mentioned Ms. Huang. Noticeably, every cabin of

the MSC Bellissima, the new flagship cruise, is equipped with ZOE, the first intelligent personal voice assistance in the world cruise industry, offering intelligent service in seven languages, including Chinese. ZOE answers hundreds of questions related to cruise and offers onboard service guidance and reservation service. "ZOE will reduce the "long lines" and provides a more profound and optimized intelligent cruise experience."

Besides intelligence, MSC Cruises remains committed to the customization of cruise products. For example, after getting the knowledge of a major trend of "multi-generational travel" among Chinese tourists, MSC Cruises tries to maintain genuine European cruise experience as much as possible, while carrying out customized "modifications" on MSC Bellissima to be launched next year. In order to meet differentiated needs of various tourists, localized Chinese modifications in parent-child activities, catering, and amusement facilities will be made such as interconnected cabins, children's play area and entertainment projects co-built by world-renowned brand Lego, and Chicco, man-

ufacture of baby care products, a hotpot restaurant cooperated with Asian master chef Jereme Leung, and original plays co-written by Cirque du Soleil.

Royal Caribbean Cruises: Optimization over localization

2019 marks the 10th anniversary of Royal Caribbean Cruises stepping into Chinese cruise market. In June this year, Royal Caribbean Cruises deployed "Spectrum of the Seas", the first Quantum-Ultra class cruise, in the homeport in China. Liu Zinan, President of Asia Pacific Region, hoped to bring Chinese passengers the "era of quantum ultra" via a series of technological innovations and service upgrading.

As we all know, cruises of the Royal Caribbean are of large capacity, offering a bigger space for entertainment and catering facilities, which, however, also exacerbates the problem of "long lines". For that, Dr. Liu said that it has been optimized by, for example, implementing traffic diversion for different vehicles at the new port, and passing out boarding cards. At present, Royal Caribbean has carried out pre-departure service, helping passengers make plans, book on-board activities and set itineraries before getting onboard. In addition, we have developed a brand new Royal APP, helping passengers to manage and plan their voyages. Onboard the "Spectrum of the Seas", passengers could also use Royal APP to control the facilities in the cabin. In terms of routes both ashore and offshore, Royal Caribbean Cruises focuses on the three special products – gourmet tour, parent-child tour and exploration tour. In 2020, Royal Caribbean Cruises will provide 1.5 times of the overnight in-depth routes that start from homeport in

China than in 2019, offering consumers more chances to explore the tourist destinations in depth. Besides, two Olympic routes will be added – voyages of the Spectrum of the Seas that set off from Shanghai on July 25 and August 2 will visit Tokyo during the Summer Olympic Games and stay overnight.

Dr. Liu Zinan defines such next stage as cruise consumption 2.0. He pointed out

What are the features of new cruises deployed in China in the future? Where does Chinese cruise market set off in the future?

Li Fengxia: In the future, the new cruises deployed in China will be more intelligent, customized with sufficient high-quality functions, instead of just trying to be bigger and bigger. Given



that at present, cruise passengers from China share two features: they are curious about new products and activities, and some of the mature passengers pursue in-depth experience. Based on that, the Spectrum of the Seas will introduce "Sky Pad"—a VR thrill, and "SiChuan Red" – a restaurant of Sichuan cuisines, optimizing the pre-departure experience for passengers at the port. As for the optimization of hardware products, Dr. Liu highlighted that the strategy of Royal Caribbean Cruises is not localization, but optimization. "That's why the 'North Star' and 'Sky Pad' on the Spectrum of the Seas are initiative experience. Because by that the Chinese cruise market could develop in a sustainable way, which is beneficial to not only cruise companies, but also Chinese consumers."

that the penetration of cruise tourism in China is not high enough yet, the first-time passengers would prefer large and new ships, so that large-size ships will remain as a major consumption driver in the near future. But, as the tendency of cruise consumption completes penetrating from coastal areas to inland, more people join the cruise tour, and the true value of cruise tourism is appreciated by more people. I believe that by that time, more middle-size cruises, not just the large-size cruises that cater to the mass market, will enter the market, to satisfy the needs of tourists who seek high-end, luxury and leisure tours. In addition, the Chinese cruise market, after the adjustment stage, will enter a new in-depth development stage, digging deeper into aspects from optimization of voyage

products, longitudinal market expansion, industrial restructuring to the deepening of economic influence.

Liu Zinan: China's market still needs brand new high-quality cruises to impel its development. But for new cruises, large size is not what tourists only want, because size is only the basis for more entertainment facilities, which is a precondition. Consumers will still judge whether

the environment, facilities and experience could meet their expectations. New cruises are a future trend, so is technology and intelligence application, and so is family cruise tour. Royal Caribbean Cruises is always confident in the Chinese market, and will keep bringing the best and newest cruise products to China. In the future, Royal Caribbean will keep investing more and more, creating the authentic cruise experience for the Chinese tourists. In 2020, Royal Caribbean plans to deploy 130 onshore boutique routes covering 27 destination ports in China.

Huang Ruiling: As an imported product, cruise, after entering the Chinese market, has brought the best hardware, as well as software that have been upgrading according to the Chinese passengers' consumption habits. In recent years, new cruises tend to be built in larger and larger size, which would make possible bigger activity space and more colorful experience. But we believe that "large"

is not the ace card, instead, quality is the primary factor for a brand to win recognition from the market and customers. Therefore, we hope to keep upgrading and improving our already authentic luxury European cruise experience, and provide Chinese customers with customized service that meets their consumption habits. In the future, second and third-tier cities as well as inland cities are there for us to exploit for market potential, and there will be more and more families and groups willing to try and take a liking to voyage. At the same time, in accordance with the experience of the cruise market, China's cruise market is also heading towards the popular and mature path, with repurchase rate and regular customers rise in number. More importantly, China's channels of distribution are relatively narrowed now. So, broadening the channels and jointly promoting the cruise culture are the key points that the whole industry must work on together.





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