



How can Taiwan create a niche in Asia's cruise tourism industry?



Chun-An Chen*

Department of International Business, Chung Hua University, 707, Sec. 2, WuFu Rd., HsinChu, 30012 Taiwan

HIGHLIGHTS

- The study explores how Taiwan could build a niche in Asia's cruise tourism industry.
- This study applies the Fuzzy Delphi and Fuzzy IPA methods.
- The results can serve as important reference to promote the cruise tourism industry.

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ABSTRACT

Cruise tourism is a significant growth trend in Europe and America. However, in recent years, it has gradually gained popularity among tourists in Asia, showing great potential. Strategically located in Asia, Taiwan is an ideal place to develop cruise tourism. This study explores how Taiwan could build a niche in Asia's cruise tourism industry. It applies the Fuzzy Delphi and Fuzzy IPA methods. According to study results, Taiwan should prioritize on the following aspects: establishing a 24-h tourist service center, providing a complete cruise logistics service, inviting foreign cruise operators to inspect special resources in Taiwan, cooperating with other Asian countries, setting up a special government unit, as well as planning and developing unique tourism resources.

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1. Introduction

Tourism is the largest industry in the world and cruise tourism has been the fastest growing sector of this industry (Dwyer & Forsyth, 1998). The global cruise industry is forecast to exhibit dynamic growth in the period up to 2025, taking annual passenger demand up from around 20.9 million in 2012 to approximately 24 m passengers by 2015, 29.7 m by 2020 and 36.4 m by 2025. This represents an overall forward expansion of 74% (OSC, 2013). In 2013 there were 802 Asia–Asia cruises, in 2015, we will see 981. The growth in capacity is even more impressive, driven by increasingly large and modern ships being deployed. In 2013, there was capacity for 1.4 million guests to take Asia–Asia cruises. In 2014 there will be room for 2.05 million, an annual growth of 19.5 percent (CLIA, 2014).

For large international cruise lines, the emerging cruise market

in Asia will drive the growth of the cruise market in Europe and America. A new journey to Asia will surely attract more foreign cruise tourists (CLIA, 2005). At present, the Asia–Pacific region is becoming an emerging cruise market. Over the years, many harbors in the Asia–Pacific region have rapidly flourished with the significant development of harbor cities such as Hong Kong, Shanghai, Xiamen, Singapore and Taiwan (OSC, 2005). The emerging economy in Asia has also resulted in the rapid growth of the cruise tourism market in the region (ECC, 2012).

With the change in lifestyle, enhancement of social wellbeing and improvement of overseas travel experience, people have recently preferred an easier and independent way to travel. At the same time, they have higher expectations when it comes to recreational experience. Therefore, cruise travel has become another leisure option for Taiwanese tourists (Josiam, Huang, Spears, Kennon, & Bahulkar, 2009). Taiwan is strategically located at the center of the Asia–Pacific region. Moreover, its four major ports; namely, Keelung Port, Taichung Port, Kaohsiung Port and Hualien Port adhere to standards that support the development of the cruise industry (Lin, 2008).

* Corresponding author.

E-mail address: cachen@chu.edu.tw.

The primary goal of tourism development is to promote the country's major attractions so as to encourage many foreign tourists to visit. In turn, the country's tourism income would increase and more employment opportunities will be created (Nieh & Chou, 2002). Currently, the world's top three cruise companies are Carnival, RCI and Star which are involved in developing the Taiwan market (KCMB, 2015). In 2014, the number of Taiwanese cruise passengers reached more than 100,000 (Fang, 2014). In recent years, Taiwan has actively promoted the tourism industry which is also helpful in developing the cruise tourism industry (Chen, Lee, & Yang, 2012).

Studies related to Taiwan's cruise industry are quite rare and most of them are focused on the sentiments of tourists rather than the development of Taiwan's cruise industry. Thus, the primary goal of this study is to explore how to elevate Taiwan's competitiveness in the cruise tourism industry, which can serve as a reference to the government and cruise tourism operators in promoting Taiwan's cruise tourism. In terms of study methods, the first step is to gather related literatures and to determine the approach to elevating Taiwan's overall competitiveness in the cruise tourism industry. The next step is to apply Fuzzy Delphi to screen out crucial aspects. After which, the Fuzzy IPA (Importance-Performance Analysis) will be used to explore the current operating performance of Taiwan's cruise tourism industry and recommendations will be proposed based on the analysis results.

2. Cruise-related studies

This section covers the literature review based on six categories.

2.1. Relevant laws and regulations

According to Ivona (2012), a modern cruise port management system must be organized. Infrastructure and environmental management should follow more stringent requirements. In addition, there is a need to resolve problems such as hospitality, travel as well as tourist destinations and sightseeing tours to effectively develop the cruise tourism market. Developing the cruise industry entails various problems, so promoting it is similar to advocating major national construction programs. Government institutions must coordinate closely both at the national and regional levels. Furthermore, related laws and regulations, including construction, must consistently adhere to policies at all levels to enable Taiwan to quickly develop its cruise-related industries (Chao, 2005).

In Taiwan which is an island country, the port plays a crucial role in the economy. Port success depends on the management of operational efficiency and port expense. Efficient clearance is also a key element to improving the port's international competitiveness (Hsiao, Lin, Chang, & Chen, 2005; Lin & Yahalom, 2009; Lin & Yau, 2012). If the port invests more manpower and resources to increase the efficiency of passenger clearance, allowing more tourists to clear customs quickly, there would be more time for cruise tourists to spend on entertainment and sightseeing.

Therefore, to develop the cruise tourism industry in Taiwan, there is a need to amend related laws and regulations, so as to improve the operational efficiency of the port.

2.2. Cultivating talents

Mancini (2000) believes that a cruise is a multi-functional transport vehicle, integrating hotel accommodation, food service and recreational facilities. Apart from transportation, a cruise also covers other aspects such as entertainment and tourism. To improve competitiveness, cruise lines must provide more attractive facilities and services that can meet demands such as food, clothing,

accommodation, transport, education and leisure (Gibson, 2006). Many tourists who join the cruise prefer to use the casino facilities (Juan & Chen, 2011). This implies that casino enthusiasts could be a potential niche market in the cruise industry.

Social interaction is crucial for cruise tourists (Huang & Hsu, 2010; Papathanassis, 2012; Yarnal & Kerstetter, 2005). It is very important to provide them with a happy and memorable social experience (Papathanassis, 2012; Weaver, 2005). Cruise tourists often face personnel who provide service. Thus, high-quality customer service is a key consideration for tourists provided for the consumers is one of the key reasons for tourists wanting to take a cruise vacation (Hung & Petrick, 2011; Josiam et al., 2009; Teye & Paris, 2011). According to Qu and Wong (1999), tourists would join a cruise again depending on the accommodation, food service and entertainment experience onboard. Therefore, service quality is also important.

In summary, when developing Taiwan's cruise tourism industry, cultivating various cruise-related talents is an important aspect to consider.

2.3. Strengthening cruise port's software and hardware facilities

Based on Greenwood & Barron (2006), the facilities, safety and environment of the home port, as well as the distance from the port, affect cruise vacation planning. Gibson (2006) points out the importance of developing and constructing a good harbor city ideal for cruise ports that can adapt to weather conditions and the four seasons, for better management of various leisure activities. The port must be capable of handling large cruise liners. It should have a convenient transport system that can access tourist destinations surrounding the port. The port should also provide comfortable, convenient, safe and professional services along with warehousing facilities. It should also offer diverse tourist attractions and supporting facilities. The passenger transport center should be equipped with an art museum exhibition. The disembarking passengers can bring many economic benefits in the ports (Brida, Fasone, Scuderi, & Zapata-Aguirre, 2014).

In addressing the issue of cruise tourism development, Lin (2008) points out that cruise tourism outcome can improve if the port could cooperate with the government in the construction of a tourist service center and passenger transport center that can be integrated into a passenger transport city that would help in the proper planning and performance of clearance and service facilities, cross-industry strategic alliance, voyage, ship type and sailing, as well as in improving the characteristics of Taiwan's cultural tourism. Sung and Wang (2007) believes that cruise lines can link with land and air traffic networks to develop and promote the overall tourism industry of Taiwan. Moreover, Lu, C.S., & Tseng, P.H. (2012) mentioned about the safety issue, so the port's software and hardware facilities should value this part.

Thus, Taiwan should actively strengthen the different software and hardware facilities of its cruise ports.

2.4. Enhancing international marketing

A successful TV series which aired in 1977 called "The Love Boat" greatly contributed to the popularity of cruise vacations. The show made people dream of taking a cruise (Cartwright & Baird, 1999; Dickinson & Vladimir, 1997). At that time, more tourists discovered and accepted the concept of cruising which made an impact in global tourism with its rapid growth. According to Fogg (2001), marketing and planning are important considerations for cruise operators to attract cruise tourists.

Wang and Hu (2009) believe that a tourism spokesman has a positive influence on the image and impression of Taiwan tourism.

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