

郵輪商機就在眼前！

Profit from cruising now!

安德魯·科金斯 Andrew Coggins

郵輪業現況

郵輪旅遊是增長得最快的旅遊門類之一。雖然乘郵輪只為度假的做法可追溯至二十世紀初葉，但現代郵輪業要到一九六六年才算啟航——那一年挪威加勒比郵輪公司(Norwegian Caribbean Lines)在邁阿密以向陽號(Sunward)開始經營郵輪旅遊業務。自一九五零年代起，亞洲就已是西方長途及環球郵輪旅遊的目的地。可是，以亞洲旅客為對象的高檔大眾郵輪市場，要到一九九三及九四年，麗星郵輪分別於新加坡及香港開展業務後才算起步。

以往，乘郵輪度假是淡季期間善用閒置的遠洋客輪的一種方法。現代郵輪業發軔於邁阿密的幾艘中檔船隻，現在已發展成普及全球的度假方式。在早期階段，郵輪只有六百至八百名乘客，排水量一萬五千至二萬噸，航程多在加勒比地區，為期由三至十四天不等。一九七五年時，全球還只有少於二十艘專為海上度假而建造的遠洋郵輪。但到了今天，這種郵輪已超過三百艘，為一千二百多萬名乘客提供愉快的郵輪假期。

這些郵輪大小不一，小的只有三千噸，像遊艇一般，大的則如皇家加勒比國際郵輪(Royal Caribbean International)達十五萬噸的海洋自由號(Freedom of the Seas)級別郵輪，以及快將面世達二十二萬噸的創始(Genesis)級別郵輪。可是，以「巴拿馬極限型船」(Panamax ship，指可以通過巴拿馬運河的最大船隻，約二百九十三米 × 三十二點三米)來說，大多數都在七萬至九萬噸之間，而以「超巴拿馬型船」(post-Panamax ship，指不能通過巴拿馬運河的船隻)來說，大多數則介乎十一萬至十三萬噸之間。載客量則由氣氛親親熱熱的五十人，到熱熱鬧鬧的四千五

The cruise industry today

One of the fastest growing segments of tourism, cruising, travelling by sea solely for vacation purposes, has its roots in the early 20th century, while the modern cruise industry started in Miami in 1966 with Norwegian Caribbean Lines' *Sunward*. Asia has been a destination for Western market long and world cruises since the 1950s. However, high-quality mass market cruising for Asian passengers did not start until 1993 and 1994 when Star Cruises set up business in Singapore and Hong Kong respectively.

Historically, cruising was a way of utilising redundant long-distance ocean liners during periods of low demand. Starting with a few contemporary ships in Miami, the modern cruise industry has evolved into a worldwide vacation form. In the beginning, cruise ships carried 600 to 800 passengers and were 15,000 to 20,000 tons. Cruises were three to 14 days and mostly in the Caribbean. As late as 1975, there were less than 20 purpose-built ocean-going cruise ships worldwide. Today, there are slightly more than 300, carrying over 12 million happy passengers.

These ships range in size from a yacht-like 3,000 tons to Royal Caribbean International's 150,000 ton *Freedom of the Seas*-class and its upcoming 220,000 ton *Genesis*-class ships. However, most of the fleet clusters around 70,000 to 90,000 tons for Panamax (the largest ship that can fit through the Panama Canal, ~293m x ~32.3m) and 110,000 to 130,000 tons for post-Panamax (too large for the Panama Canal) ships. Passenger capacity ranges from an intimate 50 to a bustling 4,500, soon to be 6,000 plus. Standard passenger capacities are 2,000 to 3,000 for Panamax and 3,500 to 4,000 for post-Panamax ships. Cruises are as short as one-night getaways and as long as 100-night plus world cruises. However, the most popular lengths are three to seven nights.

Cruise ships are homeported in North and South America, Europe, Asia, Africa, Australia and the South Pacific. Though the Caribbean remains the most popular cruising grounds, cruise ships can be seen in Alaska; Hawaii; along all the coasts of

百人，很快更會達到六千人以上。巴拿馬極限型船的標準載客量是二千至三千人，而超巴拿馬型船則是三千五百至四千人。至於航程方面，短的可以僅只一晚，不外小休而已，長的則是可達一百晚以上的環球郵輪旅程。不過，最受歡迎的航程由三晚至七晚不等。

郵輪的母港在南北美洲、歐洲、亞洲、非洲、澳洲，以及南太平洋多處地方。雖然加勒比地區仍然是最熱門的郵輪旅遊地點，但在下列地方都可以一睹郵輪的蹤影：阿拉斯加；夏威夷；南北美沿岸各處；地中海、黑海、波羅的海各處；北歐各處；印度洋和非洲東南沿岸；南太平洋、澳洲、紐西蘭各處；亞洲南北各處；以及南極和北極。

全球郵輪的總載客量超過一千五百萬人，載客率在百分之九十以上。大約百分之七十的市場在北美洲，百分之二十四在歐洲，百分之四在亞洲。除了海上郵輪旅遊外，河船旅遊是現時增長迅速的冷門市場。乘客坐的或是舒適的運河船，或是專用於河船旅遊的豪華船隻，遊覽的地方包括歐洲的河流；北美洲的密西西比河、哥倫比亞河、蛇河；非洲的尼羅河；中國的長江；以及緬甸的伊洛瓦底江。

要說郵輪品牌或郵輪公司，可謂多不勝數。但以載客量來說，三大公司就已佔去市場的百分之八十左右：嘉年華集團(Carnival Corporation)有十個品牌，市場佔有率達百分之四十五左右；皇家加勒比郵輪(Royal Caribbean Cruises)有五個品牌，市場佔有率約為百分之二十二；麗星郵輪的品牌有三個，約有百分之十一的市場佔有率。

雖然把市場分類的方法形形色色，但《郵輪業新聞》(Cruise Industry News)的分類方法平實可用：豪華(luxury)市場、高檔(premium)市場、中檔(contemporary)市場、經濟(budget)市場。大部份郵輪(約百分之六十五)都屬於中檔市場，通常航行於

North and South America; throughout the Mediterranean, Black and Baltic Seas; throughout Northern Europe; in the Indian Ocean and along the East and South coasts of Africa; throughout the South Pacific and in Australia and New Zealand; from North to South in Asia; and at both ends of the earth in the Arctic and Antarctica.

Worldwide capacity stands at more than 15 million passengers and occupancy rate at 90% plus. Approximately 70% of the market is in North America, 24% in Europe and 4% in Asia. In addition to ocean-going cruising, there is a rapidly expanding niche market of river cruising. Ranging from comfortable canal boats to luxurious specially designed river cruise boats, this market covers the rivers of Europe; the Mississippi, Columbia and Snake river systems in North America; the Nile in Africa; the Yangtze in China; and the Ayeyarwady in Myanmar.

There are numerous cruise brands or cruise lines. However, based on capacity, the industry is dominated (~80%) by three corporations, Carnival Corporation (10 brands and approximately 45% of market); Royal Caribbean Cruises (five brands and approximately 22%); and Star Cruises (three brands and approximately 11%).



最熱門的地區，航程在七晚以下，船上有多采多姿的活動和引人入勝的娛樂，吸引各種不同的旅客。中檔市場的定價甚具競爭力，初次乘郵輪度假的旅客都趨之若鶩。第二大的市場(約百分之二十五)是高檔市場。這個市場以服務、美食、航程取勝，乘坐的郵輪較為昂貴，以經驗豐富的旅客為對象，航程在七晚以上。

經濟市場(約百分之六)在北美洲已形同消失，原因是價錢不敵中檔市場。北美洲仍有少數郵輪公司專注於這個市場，歐洲則有較多，如路易斯郵輪(Louis Cruises)、普爾曼特郵輪(Pullmantur Cruises)。經濟市場的郵輪一般都船齡較大，但價錢卻頗便宜。豪華市場只佔百分之二至三左右，乘坐非常小型到大型的郵輪，無論是服務、膳食還是設施，都是最上乘的。航程方面，以七至十四晚較多，但也有更長的，所到之處遍及世界各地。除此之外，還有種種專門以特定顧客為對象的冷門市場。要把市場大致分類的話，還可以按每人的收費為準則：經濟市場(一百美元以下)、中檔市場(一百至一百五十美元)、高檔市場(二百至三百美元)、豪華市場(三百至三百五十美元及以上)。

郵輪與香港

香港擁有的天然良港景色優美，向來都是最熱門的旅遊地點之一，可說是郵輪母港的不二之選。香港船塢眾多，貨櫃碼頭業務蓬勃，海事基礎設施屬於世界一流水平，旅遊服務業名聞遐邇，提供出色的酒店服務。此外，香港還位於亞洲郵輪旅遊區域的地理中心，航空交通又十分發達，這些都是優點所在。

麗星郵輪自一九九四年起已有駐香港郵輪，歌詩達郵輪(Costa Cruises)於二零零六至零七年的冬季和春季也加以效法。這個冬季三大郵輪公司會有四艘郵輪以香港為母港：麗星郵輪的處女星號和天秤星號；嘉年華集團的愛蘭歌娜號(Costa Allegra)；皇家加勒比郵輪的海洋迎風號(Rhapsody of the Seas)。上述郵輪除了有小休一晚的航程外，還有兩晚至十六晚的航程，前往廈門、海口、三亞、下龍灣、高雄、基隆、上海、湛江、天津、濟州、長崎、

Although there are various classifications used to segment the cruise market, *Cruise Industry News'* system of luxury, premium, contemporary and budget segments forms a good general basis. The majority (~65%) of cruise ships belong to the contemporary market segment. These ships appeal to a broad range of passengers with extensive activities and fantastic entertainment. These ships are usually employed in the most popular areas on cruises of seven nights or less. Competitively priced, these are very attractive to first-time cruisers. The next largest segment (~25%) is the premium market. Concentrating on service, cuisine and itineraries, these ships are more expensive, appeal to experienced travellers and make cruises of seven nights or more.

The budget market (~6%) has virtually disappeared from North America in the face of price competition from the contemporary sector. It still exists with some North American niche operators but is larger in Europe, notably with Louis Cruises and Pullmantur Cruises. These ships are generally older and offer attractive prices. The luxury segment accounts for approximately 2-3%. These ships, offering the very finest in service, cuisine and facilities, vary in size from very small to large. Their itineraries cover the globe and tend to be seven to 14 nights or longer. The rest of the market belongs to various niche sectors serving specialised clientele. Another rough way of segmenting the market would be by per diem rates: budget (under US\$100); contemporary (US\$100-150); premium (US\$200-300); and luxury (US\$300-350 and higher).

Cruising and Hong Kong

Possessing one of the world's finest and most scenic natural harbours and consistently ranking among the top tourist destinations, Hong Kong is a prime candidate for a cruise homeport. Its shipyards and thriving container business provide a world-class maritime infrastructure while its renowned hospitality industry provides superb hotel support. Hong Kong's location at the geographic centre of Asia's cruising regions is another plus. Airlift is also not a problem.

Basing ships in Hong Kong since 1994, Star Cruises was joined by Costa Cruises for the 2006-2007 winter and spring seasons. This winter season will see four homeported ships representing the three major corporations, Star Cruises' *SuperStar Virgo* and *SuperStar Libra*; Carnival Corporation's *Costa Allegra*; and Royal Caribbean Cruises' *Rhapsody of the Seas*. Apart from one-night getaways, these ships will also visit Xiamen, Haikou, Sanya, Halong Bay, Kaohsiung, Keelung, Shanghai, Zhanjiang, Tianjin, Cheju, Nagasaki, Kobe, Tokyo, Manila, Ho Chi Minh City,

神戶、東京、馬尼拉、胡志明市、峴港、新加坡、哥打基納巴盧(沙巴首府)、斯里巴加灣市(汶萊首都)等地。

此外，有不少西方長途郵輪已到或將到香港：藍寶石公主號(Sapphire Princess)、鑽石公主號(Diamond Princess)、太陽公主號(Sun Princess)、太平洋公主號(Pacific Princess)、曙光號(Aurora)、奧麗安娜號(Oriana)、阿姆斯特丹號(Amsterdam)、斯特丹姆號(Statendam)、世鵬精神號(Seabourn Spirit)、銀色耳語號(Silver Whisper)、銀色幻影號(Silver Shadow)、七海航行者號(Seven Seas Voyager)、七海旅行者號(Seven Seas Mariner)、娜蒂卡號(Nautica)、薩迦羅絲號(Saga Rose)、歐羅巴號(Europa)、德意志號(Deutschland)、首度來港的維多利亞皇后號(Queen Victoria)、與香港告別的伊利沙伯皇后二號(Queen Elizabeth 2)。

上述郵輪載着的旅客都手頭寬裕，見多識廣而又富旅遊經驗，即使不是在二零零七至零八年抵港，也肯定會在二零零八至零九年到訪，到時要向他們銷售新穎而符合個人喜好的岸上行程，可說是黃金機會。這些郵輪中，有部份會提供由香港出發或以香港為終點的航程，這正好推銷給香港的顧客。以本地為母港的郵輪所提供的二至五晚短途航程，能使香港的顧客熟習乘坐郵輪的度假方式。這種旅遊產品性質獨特，不管是富亞洲風味、意大利風味還是美國風味的，都能令旅客享受既多樣又獨一的海上假期。嘗過這種度假方式的旅客，超過八成都會再乘郵輪度假。

售賣郵輪假期的妙處

簡單來說，售賣郵輪假期是一門好生意。國際郵輪協會(Cruise Lines International Association)認為：

- 在各種度假方式之中，郵輪旅遊令旅客滿意的比率最高，超過百分之四十五的旅客極為滿意。
- 與其他旅客相比，乘郵輪度假的旅客更可能光顧旅行社，而且不只是購買郵輪假期而已，還會購買多種旅遊產品。
- 乘郵輪度假的旅客比其他旅客的消費更多。
- 郵輪公司仍然向旅行社支付佣金，最少也有百分之十，

Da Nang, Singapore, Kota Kinabalu and Bandar Seri Begawan, on cruises from two to 16 nights.

In addition, Hong Kong has been or will be visited by a number of Western market ships on long cruises: *Sapphire Princess*, *Diamond Princess*, *Sun Princess*, *Pacific Princess*, *Aurora*, *Oriana*, *Amsterdam*, *Statendam*, *Seabourn Spirit*, *Silver Whisper*, *Silver Shadow*, *Seven Seas Voyager*, *Seven Seas Mariner*, *Nautica*, *Saga Rose*, *Europa*, *Deutschland*, *Queen Victoria* on her maiden call, and *Queen Elizabeth 2* on her farewell visit.

Carrying affluent, sophisticated and experienced travellers, these ships offer a golden opportunity for innovative and individualised shore excursions, maybe not for the 2007-2008 season but definitely for 2008-2009. A number of these ships are also offering segments originating from or terminating in Hong Kong that can be sold to Hong Kong clients. The short two-to-five-night cruises offered by the homeported ships present an opportunity to familiarise Hong Kong clients with cruising. The distinct nature of the product, Asian, Italian and American, opens the door to multiple but unique cruises enjoyed by the same client. Once someone has cruised, over 80% will cruise again.

The joy of selling cruises

Simply put, selling cruises is good business. According to the Cruise Lines International Association (CLIA):

- Cruising has the highest rate of guest satisfaction among all vacation forms, over 45% extremely satisfied.
- Cruisers are more likely than non-cruisers to use travel agents, not just for cruises but a variety of travel products.
- Cruisers spend more than non-cruisers.
- Cruise lines still pay commissions, minimum of 10% and even more for high-performing agents. For example,
 - A high-season premium balcony cabin for a six-night transatlantic cruise on *Queen Mary 2* would have a commission of US\$660;
 - A similar cabin on a 12-night European cruise on *Queen Victoria* would bring US\$1,000 plus;
 - Selling a premium cabin for a full world cruise on *Queen Elizabeth 2* can result in US\$7,000-10,000.

銷售額高的旅行社更不只這個數目。比如說：

- 在旺季作橫渡大西洋的六晚之旅，乘的是瑪麗皇后二號(Queen Mary 2)，住的是高級陽台客房，佣金會有六百六十美元；
- 如果要乘維多利亞皇后號作十二晚歐洲海上旅程，同樣是住高級陽台客房的話，佣金會超過一千美元；
- 要是住在伊利沙伯皇后二號的高級客房周遊世界的話，佣金更會高達七千至一萬美元。

找尋門路

售賣郵輪假期的成功竅門，在於為旅客找出合適的郵輪。以下幾個主要的業界組織都致力於向旅行社傳授郵輪假期的產品知識及銷售技巧：

- 北美洲的國際郵輪協會，網址：www.cruising.org。
 - 英國的客船航運協會(Passenger Shipping Association)，網址：www.the-psa.co.uk。
 - 澳洲和紐西蘭的澳大拉西亞國際郵輪協會(International Cruise Council Australasia)，網址：www.cruising.org.au。
- 上述組織也提供培訓和證書課程，詳情可瀏覽有關網址。

在業界的展覽會和會議上，不僅可獲取資訊，還可結交業者。《旅遊業》(Travel Trade)雜誌(網址：www.traveltrade.com)和國際郵輪協會會在一年中的不同日子為旅行社舉辦好些業界展覽會，參加這些展覽會對於考取國際郵輪協會的證書也有幫助。郵輪業最矚目的業界展覽會是海上貿易公司(Seatrade)在邁阿密舉行的郵輪業務會議展覽(Seatrade Cruise Shipping Convention；網址：www.cruiseshipping.net)，通常在三月的第二個星期舉行。這個展覽會為期三至四天，有一千多名郵輪業各範疇的業者及幾百名業外人士參加。雖然邁阿密的會議展覽對於瞭解郵輪業的方方面面非常有用，但要結識業者的話，更有效的方法，是出席海上貿易公司舉行的一些較小型的區域會議，或者是參加《旅遊業》雜誌的展覽會。海上貿易公司上一次的亞洲活動是二零零五年在新加坡舉行的招待會，那次聚會為郵輪公司的行政人員和旅遊地點的代表提供了會面機會。

Making contact

Putting the right client on the right cruise is essential for success. There are several major trade organisations dedicated to educating travel agents about the cruise product and how best to sell it. These are:

- Cruise Lines International Association in North America (www.cruising.org);
- Passenger Shipping Association (PSA) in the UK (www.the-psa.co.uk); and
- International Cruise Council Australasia (ICCA) in Australia and New Zealand (www.cruising.org.au).

More information on their training and certification programmes can be found at their websites.

Trade shows and conferences can provide both information and networking opportunities. *Travel Trade* magazine (www.traveltrade.com) in cooperation with CLIA holds a number of trade shows throughout the year which are targeted at travel agents. These shows also present opportunities to work towards CLIA certification. The cruise industry's major tradeshow is the Seatrade Cruise Shipping Convention (www.cruiseshipping.net) in Miami, usually during the second week of March. This three-to-four-day conference is attended by over 1,000 delegates from all aspects of the industry and several thousand trade show visitors. Though Miami is very valuable for learning about the industry and understanding its scope, networking opportunities are better at one of Seatrade's smaller regional conferences or at the *Travel Trade* shows. Seatrade's last Asian event was the House Party in Singapore in 2005, which brought together cruise line executives and destination representatives.

Founts of knowledge

There are also a number of reasonably priced (under US\$125 per year) publications that familiarise travel agents with the ships and current industry issues. These are:


- *Berlitz Complete Guide to Cruising & Cruise Ships* (www.berlitzbooks.com) by Douglas Ward
 - well organised, easy access to information, worldwide coverage, basic information on cruising, detailed information on ships
 - published annually

知識泉源

要瞭解不同的郵輪和郵輪業的當前狀況，旅行社也可挑選一些定價相宜的讀物(每年費用少於一百二十五美元)：

- 道格拉斯·沃德(Douglas Ward)所著的《伯力茨郵輪旅遊與郵輪船隻通覽》(Berlitz Complete Guide to Cruising & Cruise Ships；網址：www.berlitzbooks.com)
 - 編排有序，易於找尋資料，涵蓋世界各地，有郵輪旅遊的基本資料，以及郵輪的詳細資料
 - 每年出版一次
- 《郵輪業新聞季刊》(Cruise Industry News Quarterly；網址：www.cruiseindustrynews.com)
 - 對郵輪業重要事情的報導十分出色
 - 對郵輪公司與郵輪業專題的報導甚佳
- 《郵輪旅遊》(Cruise Travel；網址：www.cruisetravelmag.com)
 - 郵輪、海港、航程的資料
 - 對旅行社有用的資料
 - 一年出版六次
- 《海洋郵輪新聞》(Ocean & Cruise News；網址：www.oceancruisenews.com)
 - 從乘客的角度出發，對業界事情的報導非常優異
 - 出色的分類與評分指南，全面報導郵輪和郵輪旅遊
 - 由世界海洋郵輪協會(The World Ocean & Cruise Liner Society；網址：www.wocls.org)每月出版一次

乘風破浪去！

政府今年十一月九日為啟德新郵輪碼頭重新招標，新碼頭預計於二零一二年落成，到時香港會更適合成為郵輪的母港。郵輪多了，旅客也會增加，旅行社就可以向他們售賣上船前或下船後的行程，還可以向香港的顧客銷售郵輪假期。但其實旅行社只要具備郵輪的產品知識和一股衝勁，是不用等到二零一二年的，因為機會就在今天！

安德魯·科金斯博士(andrewc@baf.msmail.cuhk.edu.hk)任教於香港中文大學酒店及旅遊管理學院。

- *Cruise Industry News Quarterly* (www.cruiseindustrynews.com)
 - excellent coverage of important industry issues
 - company and issues focus gives a good picture of the industry
- *Cruise Travel* (www.cruisetravelmag.com)
 - ship, port and itinerary information
 - good information for travel agents
 - published six times a year
- *Ocean & Cruise News* (www.oceancruisenews.com)
 - excellent coverage of industry issues from the passenger point of view
 - excellent classification and value guides, comprehensive ship and cruise reports
 - published monthly by The World Ocean & Cruise Liner Society (www.wocls.org)

Sally forth!

The new Kai Tak Cruise Terminal is planned to open in 2012. On 9 November 2007, the Government reopened the request for tenders. The new terminal will greatly increase Hong Kong's ability to homeport ships. More ships mean more opportunities to handle inbound passengers, provide pre- and post-cruise packages, and also sell cruises to Hong Kong clients. However, armed with product knowledge and enthusiasm, travel agents don't have to wait until 2012. The opportunities are there today! 

Dr Andrew Coggins (andrewc@baf.msmail.cuhk.edu.hk) teaches at the School of Hotel and Tourism Management, The Chinese University of Hong Kong.