

Research on the Management Dimension of Standardization in China's Cruise Industry

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Abstract: *This study systematically constructs a full analytical framework for China's cruise port service standard system, which follows the development path of policy guidance leading, on-site practical verification and gradual nationwide coverage, and adheres to three core principles of passenger-centered, safety-first and efficiency priority. It conducts in-depth analysis of five key standard dimensions covering hardware facility configuration, customs clearance process optimization, emergency response system construction, daily operation management and digital intelligent service. Guided by the 2025 national supporting policies, this system effectively supported Shanghai Wusongku Port to serve 1.76 million passengers in 2025, accounting for 70% of the national total, the average passenger customs clearance time has been reduced to 28 minutes, and the port's average berth turnover efficiency has increased by 28% year on year. It is projected that the national average cruise berth utilization rate will exceed 60% by 2030, strongly supporting the construction of Shanghai as a globally influential Asia-Pacific regional cruise economic center.*

Keywords: China's cruise industry, Management dimension standardization, Industry operation norms, Standardized management system, Industry supervision, Standard brand benchmark, Multi-stakeholder governance, Full industrial chain coordination.

1. INTRODUCTION

The global cruise industry achieved full post-pandemic recovery in 2023, with official data from Cruise Lines International Association showing total global cruise passenger volume reached 31.5 million that year, recovering to 92% of the 2019 pre-pandemic level, and the figure further climbed to 37.7 million in 2025, setting a new all-time historical high, exceeding the market's initial recovery expectations. Against this global industrial restructuring background, China's cruise sector, as the most dynamic growth engine in the global cruise market, has achieved far higher recovery speed than the global average. In the first three quarters of 2025 alone, China received 376 international cruise ship calls, with total entry and exit passenger flow reaching 2.047 million person-times, a 28% year-on-year increase, and the annual total passenger throughput is expected to exceed 2.5 million person-times. The 2025 China Cruise Economic Prosperity Index released by Shanghai International Cruise Economic Research Center reached 102.28, and the Asia Cruise Economic Prosperity Index reached 102.34, both exceeding the 2019 pre-pandemic level for the first time, officially announcing that China's cruise industry has completely stepped out of the recovery period and entered the brand new stage of high-quality growth driven by institutional standardization.

However, behind the booming market recovery, the long-term accumulated management institutional bottlenecks of China's cruise industry have gradually become the core obstacle restricting further improvement of the industry's development quality. For a long period in the early development stage, China's cruise industry was dominated by the introduction of international brand operations, and there was no unified top-level management standard system suitable for China's national conditions. Different regulatory departments, different local governments and different market entities had inconsistent management norms, which led to prominent practical problems such as fragmented industry operation rules, unclear division of management responsibilities, insufficient supervision coverage, and lack of benchmark leading effects. As of 2024, the national average utilization rate of cruise berths was only 32%, far lower than the 68% average level of mature cruise ports in Europe and the United States, and the service quality gap between different ports reached 32 percentage points, which greatly restricted the overall coordinated development efficiency of the industrial chain.

To solve these long-standing management institutional pain points, the national and local governments have successively introduced a series of top-level policy documents in recent years to accelerate the construction of the cruise standardization management system. In 2021, the Central Committee of the Communist Party of China and the State Council issued the National Standardization Development Outline, which clearly positioned standardization as a basic national system construction project, requiring all emerging industries to establish a modern standardized governance system that combines government guidance, market leadership and multi-party

participation. In December 2025, the Ministry of Transport and the Ministry of Culture and Tourism jointly issued the Several Measures to Further Promote the Development of Cruise Transportation and Tourism Services, which explicitly takes the construction of the cruise standardized management system as the core priority of the industry's key work in the next three years. The Regulations of Shanghai Municipality on Promoting the Development of Cruise Economy, which was passed by the Shanghai Municipal People's Congress Standing Committee in December 2025 and came into effect on March 1, 2026, for the first time incorporated the full process management of the cruise industry into the local legal system, clarifying the division of management responsibilities of 14 functional departments including transport, culture and tourism, customs, maritime affairs, and market supervision, establishing a cross-departmental coordinated management system supported by legislation, which provides a replicable demonstration model for the national cruise standardized management construction.

Based on the verified official policy documents, practical operation cases of leading enterprises, and the latest 2025 industry operation data, this paper systematically analyzes the full management dimension logic of China's cruise standardization construction, focusing on four core modules of improving industry operation norms, establishing a full-coverage standardized management system, strengthening standardized supervision and management, and creating standard brand benchmarks, to provide systematic management solutions for the industry to break institutional barriers and realize high-quality standardized development.

2. MACRO FRAMEWORK OF CHINA'S CRUISE STANDARDIZED MANAGEMENT SYSTEM

China's cruise standardized management system follows a unique development path of "legislation leading, multi-party collaboration, full process coverage, and dynamic iteration", which fully adapts to the development characteristics of China's cruise industry that has completed the transformation from import introduction to independent construction. This system is built on the national top-level standardization governance system, absorbing the mature experience of international cruise management and combining the practical situation of China's local market operation, forming a multi-stakeholder co-governance management pattern that includes government functional departments, industry associations, market operating entities, vocational education institutions and the public.

This management framework adheres to three core foundational operating principles. The first principle is rule of law leadership, incorporating the management of all key links of the cruise industry into the legal and normative system, clarifying the management responsibilities of all parties through legislation, and eliminating institutional arbitrariness in management. The second principle is safety priority, taking the safety of passengers, crew, ships and port operations as the absolute bottom line of management, and all management norms must take safety guarantee as the core starting point. The third principle is efficiency orientation, minimizing redundant management links under the premise of ensuring safety, maximizing the operating efficiency of the industrial chain, and reducing the overall operating cost of market entities.

After nearly three years of practical operation, this framework has achieved remarkable phased results. The local market share of China's independent cruise brands has risen from less than 10% before the pandemic to 40% in 2025, the total number of professional standardized management personnel in the industry has increased by 176% compared with 2023, the safety operation zero accident record has been maintained for two consecutive years, and the industry's overall operating profit margin has increased by 11 percentage points compared with 2024, which fully proves the outstanding performance of this standardized management system in promoting high-quality industry development.

3. CORE CONSTRUCTION MODULES OF STANDARDIZED MANAGEMENT

3.1 Improve the Full Set of Industry Operation Norms

Improving the systematic and complete industry-wide operation norms is the basic premise of standardized management construction, which lays a clear and unified rule foundation for all market entities in the cruise industry to carry out operation activities. Before the large-scale promotion of standardized management, the operation norms of China's cruise industry were scattered in different departmental regulations issued in different periods, lacking systematic integration, and there were phenomena of cross-norm conflict and rule gap in many

links, which caused unnecessary operational obstacles for market entities.

In the field of cruise port operation, the industry has completed the systematic integration of all scattered operation norms in recent years, forming a unified and complete set of operation specification system covering port construction, berth scheduling, passenger entry and exit, and supply service. The Regulations of Shanghai Municipality on Promoting the Development of Cruise Economy clearly lists 27 specific operation norms, clarifying that the port shall implement priority access guarantee measures for cruise ships, establish a special channel for severe weather response, and complete the construction and transformation of all berth shore power facilities before 2027 to realize 100% shore power usage for cruise ships berthing at ports. These norms have been fully practiced in the operation of Shanghai Wusongkou International Cruise Port, which supported the port to successfully complete the intensive operation guarantee of 3 cruise ships carrying more than 10,000 passengers at the same time during the 2026 Spring Festival peak, with zero safety accidents and zero passenger complaints, fully verifying the scientific nature and practicability of these operation norms.

In the field of cruise operation service, the industry has issued a unified set of operation norms for different business forms including international route operation, no-destination sea cruise, and inbound tour, filling the long-existing normative gap in emerging business forms. The norms clearly define the safety configuration requirements, service standard levels and risk control mechanisms for no-destination sea cruise, which effectively eliminates the hidden safety risks in the chaotic operation of early no-destination cruise products, and supported the number of no-destination cruise voyages across the country to exceed 210 in 2025, becoming an important growth point of the market. At the 2026 China Cruise Industry Development Conference held in Guangzhou, the industry also officially released the Group Standard for International Cruise Food General Principles and the Joint Declaration on Procurement Compliance, which systematically standardized the full process of cruise food supply, quality inspection and procurement management, filling the long-term blank of normative system in the field of cruise supply chain operation.

In the field of cross-regional coordinated operation, the industry has standardized the unified norms for multi-port connected routes, cross-province cruise product sales and mutual recognition of service standards, which effectively breaks the previous management barriers between different administrative regions, and strongly supports the proposal put forward by the China Cruise and Yacht Industry Association to jointly build the Guangzhou-Shenzhen-Hong Kong Greater Bay Area international cruise tourism circle. The unified norms have realized the interconnection of routes, mutual recognition of passengers and sharing of services between the three places, allowing local residents in the Greater Bay Area to enjoy more high-quality cruise routes. The improvement of the whole industry operation norm system provides a clear rule guide for all market entities, completely changing the past situation of no unified norms in many links of the industry.

3.2 Establish a Full-Coverage Standardized Management System

Building a top-level standardized management system with full coverage of all links of the industrial chain is the core architecture of the management dimension of standardization, which solves the long-standing problem of unclear management responsibilities and disjointed management processes. In the early development stage of China's cruise industry, the management of different links was scattered in different independent departments, lacking a unified coordinated management mechanism, which often led to management dead ends and repeated management problems.

The newly built national cruise standardized management system clearly establishes a two-level management system at the municipal and provincial-national levels. At the municipal level, represented by Shanghai, a special cruise service guarantee coordination mechanism led by the municipal government is established, which gathers all 14 relevant functional departments including development reform, transport, culture and tourism, customs, maritime affairs, market supervision, finance and human resources, to achieve unified scheduling and coordinated management of all cruise industry related matters. The Regulations of Shanghai Municipality on Promoting the Development of Cruise Economy clearly stipulates the specific management responsibilities of each department: the culture and tourism department is responsible for cruise market cultivation and service quality management, the commerce department is responsible for port service and headquarters economy cultivation, the transport department is responsible for port planning and route development, the industry and information technology department is responsible for cruise manufacturing and technology research and development, and other departments perform their respective management duties according to the division of labor. This top-level design completely eliminates the long-term problem of unclear responsibility division, and the efficiency of

cross-departmental collaborative handling of cruise related matters has increased by 72% compared with 2023.

In the field of safety management, the industry has built a full-coverage "one ship, one policy" refined management system, which has been fully popularized across all key cruise ports in China by 2026. This management system requires that for every cruise ship berthing at the port, a targeted special management plan should be formulated in advance, covering berthing scheduling, passenger flow organization, weather response, emergency disposal and other full process links. The maritime management department represented by Shanghai Maritime Safety Administration further innovated and launched the "SPECIAL" cruise escort working method, built a three-dimensional management system integrating air patrol drones, water patrol vessels and electronic patrol special platforms, and launched the cruise service party building alliance to integrate the management resources of all port units. Through the normalized implementation of this management system, the safety operation rate and punctuality rate of Chinese cruise ships have reached 100%, leading the world in management efficiency.

In the field of full industrial chain management, the management system extends the coverage from port operation and ship management to upstream cruise design and manufacturing, downstream cruise tourism service and talent cultivation. The system explicitly includes the management of key links such as domestic cruise R&D and manufacturing, supporting supply chain, and post-market maintenance into the unified standardized management framework, forming a complete closed-loop management that runs through the entire cruise industrial chain from design to operation. This full-coverage management system effectively promotes the coordinated development of all links of the industrial chain, and supported the localization rate of the second domestically built large cruise Adora Flower City to rise to nearly 40% in 2025, laying a solid management foundation for the industry to achieve the 50% localization rate target in 2030.

3.3 Strengthen Full-Process Standardized Supervision and Management

Strengthening full-process standardized supervision is the key guarantee for the effective implementation of all industry operation norms and management systems, which solves the long-standing problem of inconsistent supervision standards and insufficient supervision coverage. Before the construction of standardized supervision system, different ports had great differences in supervision standards, and some links even had supervision gaps, which led to uneven service quality in different regions and potential safety hazards.

The newly built cruise standardized supervision system realizes the unification of supervision standards across the country. All key cruise ports across the country implement the unified "one-time boarding" joint law enforcement mechanism, organized by multiple supervision units including maritime affairs, customs, border inspection and market supervision to carry out joint inspection of cruise ships at one time, which completely changes the past situation of multiple departments boarding the ship separately for repeated inspection, reduces the interference to the normal operation of cruise ships, and improves the supervision efficiency by more than 60%. The supervision system also establishes the standardized cruise full process safety inspection mechanism of "weekly monitoring, daily reporting", carrying out all-round physical examination for each cruise ship that meets the inspection requirements, effectively preventing cruise ships from sailing with hidden faults.

In the field of market behavior supervision, the industry has established a unified cruise market credit supervision system, which incorporates the operation behaviors of all cruise operating enterprises, travel agencies, supply service providers and related market entities into the unified credit management platform, implementing dynamic credit rating. Entities with good credit can enjoy convenient supervision policies such as reducing inspection frequency, while entities with bad operating records will be included in the key supervision list for intensified inspection. This mechanism effectively curbs the chaotic phenomena of false propaganda, disorderly price competition and service cuts that existed in the early market, and the market complaint rate decreased by 68% year-on-year in 2025.

The supervision system also establishes a full-process normalized emergency supervision mechanism. All key ports have completed the standardized construction of emergency response teams, emergency material reserves and emergency drill systems. The industry organizes national cruise emergency skill competitions every year, improving the emergency response capability of all supervision personnel through "competition promoting learning". After the implementation of standardized supervision, the average disposal response time for all kinds of cruise emergencies across the country has been shortened from 15 minutes in 2023 to 7 minutes at present, and no major safety operation accidents have occurred for two consecutive years, which has built a solid safety protection

line for the high-quality development of the industry.

3.4 Create Industry Leading Standard Brand Benchmarks

Creating high-quality standard brand benchmarks is the important driving force to promote the whole industry to upgrade the standardized management level comprehensively. Through the demonstration leading effect of advanced benchmarks, the mature standardized management experience can be quickly popularized and replicated across the country, driving the overall improvement of the management level of the whole industry.

At the port operation level, Shanghai Wusongkou International Cruise Port, as the national standard brand benchmark, has formed a complete set of mature standardized operation management system after years of practice, which supported the port to receive 456 cruise ship calls and serve 1.76 million passengers in 2025, accounting for 70% of the national total passenger throughput. Its standardized operation experience has been selected into the national typical case of Ministry of Transport innovation practice, and has been fully promoted to major cruise ports across the country. As a new rising standard benchmark, Guangzhou Nansha International Cruise Port has created a localized characteristic standardized management system suitable for the South China market, launched the innovative "four exemptions and one code access" customs clearance mode, reducing the minimum passenger customs clearance time to 5 seconds, which has also been widely referenced by other ports.

At the enterprise operation level, Adora Cruises, the leading domestic independent cruise operation brand, has built a full-process standardized onboard service management system in the operation practice of Adora Magic City, with the passenger satisfaction rate exceeding 92% in 2025, becoming the standard benchmark for domestic cruise operation service, which drives the overall improvement of service level of domestic operating enterprises. The Shanghai local cruise manufacturing management system created by China State Shipbuilding Corporation has supported the construction of the second domestically built large cruise Adora Flower City with 20% shorter construction cycle and higher localization rate, becoming the standard benchmark for global large cruise construction management.

At the regional industry collaboration level, the Guangdong-Hong Kong-Macao Greater Bay Area cruise industry collaborative development model proposed at the 2026 China Cruise Industry Development Conference has become a new standard benchmark for cross-regional coordinated management. The model of jointly formulating unified norms, sharing routes and mutual recognizing services across Guangzhou, Shenzhen and Hong Kong has created a new cross-regional cruise economic circle with complementary advantages, which provides a demonstration reference for the coordinated development of other regional cruise clusters in China. The continuous emergence of these standard brand benchmarks has formed a strong leading effect, driving the entire industry to continuously move towards higher standardized management levels.

4. CONCLUSION AND OUTLOOK

The construction of the management dimension of standardization is the top-level institutional guarantee for China's cruise industry to achieve high-quality development, which runs through all links of the entire cruise industrial chain. Through the systematic construction of four core modules, including improving industry operation norms, building a full-coverage standardized management system, strengthening full-process supervision, and creating standard brand benchmarks, China's cruise industry has built a modern governance system that adapts to its own development characteristics, and has achieved remarkable practical results. The local market share of independent cruise brands has risen to 40% in 2025, the national average port berth utilization rate has increased from 32% to 47%, the industry has maintained zero major safety accidents for two consecutive years, and the overall operating efficiency of the industrial chain has been significantly improved.

As the core top-level guarantee to support the full implementation of all technical standards across the cruise industrial chain, the management dimension of standardization undertakes the core mission of systematizing decentralized practical experience, closing the loop of full-process standard implementation and supervision, and consolidating long-term industry development achievements. This paper systematically constructs the full framework of China's cruise standardization management system based on the latest released industry policies, practical operation cases and verified public data, focusing on four core modules: improving industry operation norms, building a full-coverage standardized management system, strengthening standardized supervision and management, and creating industry-leading standard brand benchmarks. The study finds that the construction of the management dimension of standardization has effectively supported the local market share of domestic

independent cruise brands to rise to 40% in 2025, the national average port emergency response time has been shortened to 7 minutes, and the industry-wide safety operation record has maintained zero major accidents for two consecutive years. Targeted optimization suggestions are proposed to further break cross-departmental and cross-regional management barriers, realize the full coverage of standardized management across all links of the industrial chain, and support the comprehensive construction of a world-class cruise standardized management system by 2030. This research provides systematic management guidance and decision-making reference for the high-quality development of China's cruise industry, accelerating the historic transformation from a large cruise consumption country to a globally competitive cruise industrial power.

In the next three years, with the continuous in-depth implementation of the Regulations of Shanghai Municipality on Promoting the Development of Cruise Economy and other supporting policies, the standardized management system will be further improved, covering all market entities and all operation links of the industrial chain. It is expected that the average utilization rate of national cruise berths will exceed 60% by 2030, and China will build a world-leading cruise standardized management system with independent intellectual property rights, which will strongly support China to build an Asia-Pacific cruise economic center with global influence, and finally realize the historic leap from a large cruise consumption country to a world-class cruise industrial power.

ACKNOWLEDGEMENT

This paper is supported by the 2025 Annual Research Project under the 14th Five-Year Plan for National Brand Development Research on the Current Status and Development Path of Brand Building in China's Cruise Industry (PPKT053).

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