

A comparative evaluation of main cruise ports in Korea, China and Japan in Northeast Asia¹

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Abstract

The cruise travel market has increased average 8% per annum for the last 30 years and has closed relation with basic industries with area where cruise berths. Accordingly, many countries in the world make every effort to attract cruise forwarder. It is necessary to examine required conditions for Jeju to be a hub port by comparing main cruise ports of Jeju Port, Yokohama Port and Shanghai Port in Korea, China and Japan.

Key words :

cruise, cruise home port, cruise tour

1) This article is a revised and amended version of ph.d dissertation of Yang, Jeong cheol(2015) 『A study on the selection factor of cruise home port』.

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1. Introduction

For the last 30 years, the world cruise travel market has increased average 8% per annum. Compared with annual growth rate of 4% in the global travel market, it is more than double (Hung, K. & Petick, J. F. 2010 pp206–207). Cruise industry has closely related to businesses of calling port and home port such as travel, aviation, maritime, service, agricultural, fishery and livestock and local cultural businesses recognized as the high value added industry in the 21st century. As for the global cruise market growth, there were 17,800,000 travelers in 2009 with 21,300,000 in 2013 and 23,000,000 in 2015 (CLIA, 2015). As for regions, Caribbean market with the US at its center accounted for more than 50% followed by Europe with more than 30% and other central and south American, Oceanian and Asian markets. In particular, in Asian markets, Singapore became a cruise home port in Asia in 1990s playing a role as a cruise hub in Southeast Asia. Recently, routes in Korea, China and Japan has been rapidly expanded with China at its center. It is because global forwarders expanded routes in Korea, China and Japan along with the activation of cruise tourism thanks to the rapid economic growth of China and cruise promotion policy. Therefore, It is necessary to examine required conditions for Jeju to be a hub port by comparing main cruise ports of Jeju Port, Yokohama Port and Shanghai Port in Korea, China and Japan.

2. Theoretical background of cruise tour

2-1. Concept and effect of cruise tour

According to the definition of World cruise Association and associated scholars, cruise tour is defined as a traveling ship having more than 2 calling ports. cruise tour also means a ship that transports more than 1 calling port regularly or irregularly by equipping accommodation, food and drink and quality leisure service facilities equipped with general conditions of floating, loading and mobility. (Jeju Special Self-Governing Province, 2014). As for effects of cruise tour, according to world cruise forwarder data in 2015, global market size of cruise tour in 2013 was \$11.7 billion with 891,000 associated employees with total \$3.8 billion won of wage. The cruise industry of the Caribbean ocean market of North America which accounts for more than 50% of the world cruise market had \$4.4 billion of size with 363,000 employee and \$1.8 billion dollars of wage (CLIA. 2015 p13).

It has indirect effects including local development by government investment for cruise industry, development of waterfront space

by related enterprises and port area and new job creation (Ministry of culture, sports and tourism 2013 P.4). In addition, total effects and individual effect by cruise tour in many reports can be summarized as follows.

Firstly, it has effect from global view. According to the report of the World cruise Association, cruise tour industry is a complex industry with other institutions. 50,000 agents, 13,500 travel agencies and 250 administrative partners including port authorities, shop repair vendors, hotel and resort, agricultural and livestock industry, cruise sales office, cruise travel agency, forwarder sales office, entertainment industry, oil refinery, interior, insurance, local travel industry, shipbuilding industry and maritime pilotage industry have connected to one another (CLIA, 2014, p.13).

Secondly, it has economic effect in the region. According to the cruise industry activation measure published in the central government in 2013, the cruise tour is defined as high value added industry having a serial effect in marine transport, aviation, shipbuilding and distribution. Economic effect of 30,000 ton size cruise is estimated to have 90.2 billion won with 968 new jobs. And, according to the survey by the Korea Tourism Organization in 2012, direct expenditure of 280,000 travellers in calling port in Korea was 130 billion KRW. It is average \$512 per traveler which is twice higher than ordinary travellers (Related dept. joint meeting resource, 2013, pp.1–2).

2-2. Type of cruise tour

Generally, type of cruise tour can be divided by area of navigation, size of cruise, nature of cruise and objective of cruise. It is as in (Table 1).

〈Table1〉 Classification of type of cruise tour

Area of navigation	Size of cruise	Nature of cruise	Objective of cruise
<ul style="list-style-type: none"> · Marine cruise · Coastal cruise · River cruise 	<ul style="list-style-type: none"> · Small cruise · Medium cruise · Large cruise · Mega size cruise 	<ul style="list-style-type: none"> · Traditional cruise · Resort cruise · Premium cruise · Luxury cruise · Special cruise 	<ul style="list-style-type: none"> · Travel cruise · Seminar cruise · Theme cruise

Source: Lee Kyung Mo, 『Understanding of cruise industry』, Daewangsa, 2013, p.43.

cruise by area of navigation is divided into marine cruise linking countries, coastal cruise linking cities and river cruise linking rivers.

By size, it includes small cruise under 25,000 ton with 500 passengers, medium cruise between 25,000~70,000 ton with 500~1,000 passengers, large cruise between 70,000 and 100,000 ton with more than 1,000 and mega size cruise more than

100,000 ton with 25,000 passengers.

By nature, it is divided into traditional cruise, resort cruise with resort level amenities, premium cruise showing premium atmosphere, and special cruise exploring niche market such as the Antarctic and Amazon.

By purpose, it is divided into travel cruise for travelling the calling port, seminar and party cruise for business and travel and theme cruise selling commodities with special purpose(Lee Kyung Mo, 2013, pp.43-47).

3. Analysis of main cruise ports in Korea, China and Japan

The study compared main cruise ports of Northeast Asian routes in Korea, China and Japan through export interview based on 30 factors including international airport and immigration facilities in Jeju, Shanghai an Yokohama. Home ports that global forwarders prefer to are Shanghai in China and Yokohama in Japan. The best calling port in Asia is located in the central route of Northeast Asia and there is Jeju having record of 242 calling in 2014.

In case of Shanghai in China, it is the area where there is a huge hinterland market of 1.3 billion population, and it has larger home port than one in Hong Kong Autonomous District. As for Yokohama port in Japan, it is a representative trade port and is regarded as a beautiful travel port of Asia. It has 1.2 billion population of hinterland market and Tokyo, a large market. Jeju is a global travel city with more than 13 million tourists per year and it is the most favorite calling port in Northeast Asia cruise market by global cruise forwarders. It is necessary to figure out limit of Jeju and plan to overcome by comparing these 3 ports.

Basic information of each ports in Korea, China and Japan is as in <Table2>.

<Table2> General information on target area in each country

Category	Jeju, Korea	Shanghai, China	Yokohama, Japan
Location	Jeju port	Usongkeou Port	Osanbasi
Water depth	12m	9m~13m	10m~12m
Berth size	140,000 to 1 cruise Reserve 80,000 ton 1 cruise	100,000 ton 1 berth 200,000 ton 1 berth	10 ton 4 cruise
Total terminal area	9,885㎡(under construction)	50,000㎡	4,4000㎡
Distance from int'l airport	10km	50km	19km
Urban accessibility	2km	23km	2km
Traffic	Bus, taxi	Bus, taxi, subway	Bus, taxi, railway

Travel link	Moderate	Excellent	Excellent
Shopping link	Moderate	Excellent	Excellent
Accommodation	Excellent	Excellent	Excellent
Topography	Island	Mainland	Mainland
Port features	Cargo/ cruise port	cruise port	cruise port
Marine transport	Good	Good	Good

Source: Developed by researcher by sorting out data in each port authority

3-1. Geographical status of Jeju · Shanghai · Yokohama¹

Northeast Asian market includes 660 million population in the routes of Korea, China and Japan. First is Shandong, Hebei and Liaoning with 170 million of potential cruise customers. Second is Shanghai, Anhu, Fujian, Guangdong and Taiwan with 270 million population. Third is Korea, south of Japan including Fukuhoka, Hiroshima and Kitakyushu with 50 million customers. Fifth is central and north Japan with 40 million customers. Next is Far East Asian market of Vladivostok with 130 million customers. It shows that Northeast Asian market which is in the beginning stage of cruise can be an important market in the world cruise market. It is as in <Fig. 1>.



<Fig.1> Potential cruise market size of Northeast Asia
Source: 『Development direction of Jeju cruise industry』,(2013:22)

Jeju is located at the center of Northeast Asia cruise market. It is as in 『Fig. 1』. It shows that Jeju can be a hub of Northeast Asia geographically. Distance between each calling port is important in selecting cruise route. As shown in the above figure, it takes 27 hours to travel 900km between Shanghai and Fukuhoka.

Optimal cruise route is departure in the evening and arrival in the evening at the calling port. In that sense, Jeju becomes calling port as it is too far to make direct voyage. It takes 54 hours to travel 1,850 km between Yokohama and Shanghai. It shows that Jeju can play a supplementary role as a calling port

1) Travel distance marked in the study is based on straight distance in the map.

in the central route of Northeast Asia.

To figure out geographical condition of calling port, cruise sailing speed was calculated based on Royal Caribbean Line. Average sailing speed was 18knot ~ 20knot, which is 33.3km - 37km being 1knot = 1,85km. Maximum sailing speed of Royal Caribbean Line includes 70,000 ton with 24knot, 80,000 ton with 18 knot, 90,000 ton with 25 knot, 140,000 ton with 22knot, 150,000 ton with 22knot, 160,000 ton with 21 knot and 170,000 ton with 22 knot. Sailing condition per port was analyzed with average sailing speed of 18knot ~ 20knot.

1) Sailing condition with Jeju as its home port

Assuming Jeju as the home port in the source market, the selection requirements of home port are as follows. It needs to calculate route from Jeju. As cruise has a route to move to ocean, it needs centrality on the route

Jeju is 540km away from Shanghai and it reaches 14.5 hours with cruise speed. Fukuoka is 335km away and can be reached in 9 hours. So, East Sea Rim route with Jeju at its center can be developed to connect Asia and Pacific route beyond Japan and China.

Vladivostok is 1,150km away from Jeju and Far East Asia route can be developed by linking Japan and North Korea with Jeju as its home port. That route can be a peace route to improve South and North relation and has a meaning of connection of peace and culture between Siberian railway and marine Silk Road. As most holiday period in Asian countries is less than 7 days, Jeju may have sufficient competitiveness if cruise facility is refurbished. Distance and time taken per calling port is as in <Table 3>.

<Table3> Sailing time per calling port with Jeju as home port

Departure City	distance (km)	destination	Flight times	Remarks
Incheon	500	Jeju	13.5 ~ 15.0	
Busan	302		8.1 ~ 9.0	
Shanghai	540		14.5 ~ 16.2	
Tianjin	1,150		31 ~ 34.5	
Qingdao	634		17.1 ~ 19	
HongKong	1,740		47.0 ~ 52.2	
Dalian	741		20.0 ~ 22.2	
Yantai	702		18.9 ~ 21.0	
FUZHOU	1,080		29.1 ~ 32.4	
Taipei	1,050		31.5 ~ 28.3	
Fukuoka	335		9.0 ~ 10.0	
Yokohama	1,240		33.5 ~ 37.2	
Osaka	840		22.7 ~ 25.2	
Okinawa	817		22.0 ~ 24.5	
Nagasaki	325		8.7 ~ 9.7	
Hokkaido	1,673		45.2 ~ 50.2	

2) Shanghai home port sailing condition

Shanghai is China's first economic city with huge market. Shanghai is a home port with active global forwarders. But, Shanghai is insufficient to be the central route in Northeast Asia.

Shanghai is 1,600 km away from Vladivostok straightforward, but if it is circumvent by calling ports, it takes more than 2,000km making it difficult to design East Sea rim route as it is lack of centrality of route. And, it is also difficult to create Hokkaido route of Japan and multi-route in Korea, China and Japan. As route to detour calling port is long, it is hard to make route including whole Japan. It is shown in <Table 4>.

<Table4> Sailing time per calling port with Shanghai as home port

Departure City	distance (km)	destination	Flight times	Remarks
Jeju	540	Shanghai	14.5 ~ 16.2	
Incheon	907		24.3 ~ 27.2	
Busan	880		23.7 ~ 26.4	
Tianjin	1,311		35.4 ~ 39.3	
Qingdao	556		15.0 ~ 16.6	
HongKong	1,574		42.5 ~ 47.2	
Dalian	1,011		27.3 ~ 30.6	
Yantai	951		25.7 ~ 28.5	
FUZHOU	723		19.5 ~ 21.7	
Taipei	675		18.2 ~ 20.2	
Fukuoka	911		24.6 ~ 27.3	
Yokohama	1,825		49.3 ~ 54.8	
Osaka	1,504		40.6 ~ 45.1	
Okinawa	833		22.5 ~ 25.0	
Nagasaki	853		23.0 ~ 25.6	
Hokkaido	2,238		60.4 ~ 67.2	

3) Yokohama home port sailing condition

Among Korea, China and Japan, Japan developed cruise industry first for 20 years ago, and Yokohama is a world famous beautiful port with many travellers. As Yokohama is located in the right pacific ocean in the Northeast Asia market, it is limited to be the central route. If it goes to China, most routes take more than 2,000 km. Thus, Northeast Asia route is limited. That is the limit of cruise tour in Northeast Asian route from Yokohama.

Normal days of travel in Asia cruise travellers are 3~4 days, which made it difficult to visit Korea, China and Japan from Yokohama. As days of holiday in Asian companies is 7 days which is less than American and European countries with 15 days, it is not suitable to be the central route in the Northeast Asia cruise. For this reason, cruise industry in Japan has been activated domestically. Calling port distance and sailing time are in <Table 5>.

〈Table5〉 Sailing time per calling port with Yokohama as home port

Departure City	distance (km)	destination	Flight times	Remarks
Shanghai	1,852	Yokohama	49.3 ~ 54.8	
Tianjin	2,615		70.6 ~ 78.5	
Qingdao	2,178		58.8 ~ 65.4	
HongKong	3,148		85 ~ 94.5	
Dalian	2,313		62.5 ~ 69.4	
Yantai	2,315		62.5 ~ 69.5	
FUZHOU	2,212		59.7 ~ 66.4	
Taipei	2,093		56.5 ~ 62.8	
Fukuoka	1,418		38.3 ~ 42.5	
Okinawa	1,545		41.7 ~ 46.3	
Nagasaki	1,271		34.3 ~ 38.1	
Hokkaido	1,088		29.4 ~ 32.6	
Osaka	889		24.0 ~ 26.6	
Jeju	1,488		40.2 ~ 44.6	
Incheon	2,133		57.6 ~ 64.0	
Busan	1,542		41.6 ~ 46.3	

4) Analysis of location of Jeju as home port for flight and cruise

To analyze geographical condition of Jeju as home port of cruise in Northeast Asia, it was assumed to analyze condition of flight and cruise as in 〈Fig.2〉. The study analyzed large cities of Northeast Asia with Jeju at its center

Within 3 hours of travel are Beijing, Shanghai, Tianjin, Xiamen and Harbin which gives possibility to preoccupy 600 million population market. As for Shanghai, the closest city, it takes 50 minutes by flight and if Jeju is developed as home port, it can be the greatest central axis. Lack of 24 hours airport is regarded as the greatest disadvantage to be a cruise home port. Under this circumstance, if it becomes a cruise home port, it is analyzed that 50% of cruise passengers have travel at the home port by 1~2 days advanced arrival and 50% of passengers to come to the cruise on the day for cruise tour. It is same with departure after cruise tour. 50% will stay one day in Jeju and 50% will have tour before departure to overseas. If so, it can play a role as home port with existing airport.



Distance analysis for Flight and Cruise



Analysis of sailing distance with Jeju as home port



Analysis of sailing distance with Shanghai as home port



Analysis of sailing distance with Yokohama as home port

〈Fig.2〉 Location of port of Flight and Cruise

3-2. Result of comparison of home ports in Korea, China and Japan

Overall factors of ports in Jeju, Shanghai and Yokohama were classified into 72 among which 30 were selected for evaluation. Qualitative study was taken to find important factors, which was

transferred to quantitative study. For this purpose generally used 5 point scale evaluation index was employed². As for the analysis of important factors, Jeju had the highest point in centrality of marine transport. It is because Jeju has the most favorable geographical location in Northeast Asia. Shanghai is lack of centrality compared with Jeju as it is in the mainland. So is Yokohama.

As for source market capacity, Shanghai is competitive with 1.3 billion population of hinterland market. Yokohama has hinterland market of domestic cruise industry for 20 years. As for casino license, foreigners can enjoy casino, but strict standard is applied in cruise.

In Japan, casino is developed as a travel industry deviating from restriction of casino. And, casino is permitted in the domestic cruise. As for China, casino is legitimate in Macao but domestic is illegal. But, open sea casino in cruise is allowed in Hong Kong.

As for Jeju, source market is very rare. Incentives per berth is tax reduction benefits by the number of berth in Korea, China and Japan.

As for simplified immigration process of passenger, visa-wave entry is possible as an immigration office staff is onboard in Jeju, but it takes longer due to the extension of cruise terminal. China has rather time consuming as immigration is made after alight. Yokohama employs systematic immigration system and it takes 30 minutes based on 2,000 passengers.

As for corporate tax in Korea, it is 27%, but foreign investment is exempted for taxation under the special act on exemption of tax. Subsidy in the industry can be enacted in August according to article 8 of "the act on cruise industry promotion and support." In China, corporate tax rate is 15%, but most foreign investment companies enjoy exemption benefits. From August 2015 "Act on cruise industry promotion and support" has been activated, the effect of cruise industry in Jeju has been ever expanded. Japan applies 34.62%(35.64% in Tokyo). From 2015 onward, low tax rate of 2% is applied and it will be reduced 5% for 5 years(Yonhap News, 2014). Besides, income expansion promotion taxation system and employment promotion taxation system are introduced to reduce corporate tax.

Regarding passenger amenities, first-aid facilities, CIQ facility, customs and quarantine facilities, Japan and China received excellent points as they are inside cruise terminal. There is no cruise terminal installed in Jeju causing inconvenience. International mail and currency exchange system is evaluated as moderate but Shanghai and Yokohama are excellent.

For berth, China and Japan are possible for good berthing, but Jeju is impossible to berth 2 ships of 100,000 ton. If civil and military complex port is complete, berthing capacity will accommodate 2 ships of 150,000 ton.

As for night anchoring facility, desalination supply line, waste and spoiled water treatment facilities, ports in China and Japan are exclusively for cruise having amenities for cruise. But, it is inconvenient in Jeju as it is complex port. As for luggage treatment facility, it is insufficient in Jeju without cruise terminal, but it is good to China and Japan with cruise terminal. Width of port and towing facility, Japan is convenient with good berthing structure. But, Jeju takes much time for berthing. As for Osong. Shanghai Usongkeou cruise terminal takes 3 hours for sailing from towing.

As for marine rescue and police support, three are excellent. As for cruise dedicated dept, China and Japan are excellent, but cruise dept. in Jeju is dualized. As for cruise amenities, Japan and China are available to make routine repair at cruise, but it is impossible in Jeju. As for international airport, China and Japan is possible to make systematic transportation in two airports, but Jeju has limited lines in limited time.

As for food material supply, Japan and Jeju are available to have fresh agricultural and industrial products, but China is rather insufficient. For convenient accommodation, Shanghai, Yokohama and Jeju equip perfect accommodation. As for public transportation connection, diversified transportation means in urban area and travel attractions, Japan is available to connect via subway and has good public transportation route. China also has good public transportation system using main road network linked to the terminal. Jeju has inconvenient public transportation and is lack in connection system to the urban center.

As for experience (adventure) travel areas, Japan has developed travel attractions near Minato Mirai 21 that enables inland travel using Shinkansen. As for Shanghai, many tourist attractions are in Pudong and city center of Shanghai. But, tourist attractions in Jeju is rather scanty. As for natural landscape, three calling ports are excellent as they are all international tourism places.

A for convenient travel system, Yokohama is Excellent, but Jeju and Shanghai are rather inconvenient to connect into city area. As for convenient interpretation service, Yokohama is good, but Shanghai is inconvenient. Jeju uses smart phone App to fill the gap of interpretation service, but it is rather inconvenient. Strengths and weaknesses of each factor are analyzed in <Table6>.

2) It is a scale to evaluate the subject and differentiate attributes assuming that attributes of the measurement target (phenomenon, figure of object) are located in a serial line.

〈Table6〉 Overall assessment table of port analysis
(30 comparison items)

division	Jeju	Shanghai	Yokohama	Evaluation Items
centrality of marine transportation	◎	●	△	proximity between the ports of call
	5	3	2	
cruise passenger attraction capability (source market)	▽	◎	◎	Hinterland Facilities
	1	5	5	
casino license standards eased(improved)	●	◎	◎	Legal and Institutional Capabilities
	3	5	5	
incentive benefits of cruise	○	○	○	Cruise
	4	4	4	
customs clearance procedures(passengers and crews) simplified	○	●	○	Simplify Immigration
	4	3	4	
tax reduction benefits available if selected as home port	▽	○	○	Cruise
	1	4	4	
passenger amenities (Observatory, waiting room, internet)	▽	◎	◎	Cruise Terminal
	1	5	5	
emergency medical facilities (Convenience Clinics, pharmacy)	△	◎	◎	Cruise Terminal
	2	5	5	
CIQ(emigration/immigration) facilities	○	●	◎	emigration/immigration
	4	3	5	
customhouse and quarantine facilities	▽	◎	◎	emigration/immigration facility
	1	5	5	
international mailing facilities and banks	●	◎	◎	Cruise Terminal
	3	5	5	
dock(more than 2) and docking facility(over 400m)	●	◎	◎	anchorage facilities in good condition
	3	5	5	
water depth(8-14m)	●	○	●	anchorage facilities in good condition
	3	4	3	
nighttime anchorage facilities	●	◎	◎	anchorage facilities in good condition
	3	5	5	
waste disposal facilities and sewage/wastewater treatment facilities	●	◎	◎	Are there any ship amenities
	3	5	5	
desalination supply lines (Fresh water supply)	◎	◎	◎	Are there any ship amenities
	5	5	5	
luggage processing facilities	▽	◎	◎	passenger amenities
	1	5	5	
port width and towing facilities	●	◎	◎	Are there any ship amenities
	3	5	5	
offshore rescue and police support	○	◎	◎	Are the offshore rescue and police support easily available
	4	5	5	
department dedicated to cruise	△	◎	◎	Is there any department dedicated to cruise
	2	5	5	
any ship amenities (Ship Repair and Towing of ships)	●	◎	◎	Are there any ship amenities
	3	5	5	
international airport (Fly and Cruise)	△	◎	◎	cruise home port selection factors
	1	5	5	
food (food on board ship) be supplied	●	○	○	cruise home port selection factors
	3	4	4	
any convenient accommodation facilities	◎	◎	◎	cruise home port selection factors
	5	5	5	
public transportation and transfer facilities (Transit facilities)	●	◎	◎	convenient tourist information system
	3	5	5	
downtown and Tourist destination various transportation (Public transportation, Taxi, subway)	●	◎	◎	convenient tourist information system
	3	5	5	
experiential(adventure type) tour facilities	●	○	◎	convenient tourist information system
	3	4	5	
excellent natural scenery	◎	○	○	natural scenery
	5	4	4	
convenient tourist information system	◎	●	◎	convenient tourist information system
	3	3	5	
convenient interpretation service	●	●	◎	convenient tourist information system
	3	3	5	
Visitors	88	134	141	

Note) ◎: Excellent 5, ○: Good 4, ●: Moderate 3, △: Poor 2, ▽: Very poor 1

4. Conclusion

When Jeju, Shanghai and Yokohama were compared for analysis, Jeju has poor condition in other target home ports in all aspects. But as shown above, Jeju is the best calling port in Northeast Asia. There is one reason why global forwarders select Jeju despite such poor environment. It is because Jeju is central in the Northeast Asian route. It will be of great benefit in the promotion of policy by Jeju.

As in 『Fig. 2』, Jeju has the optimal location in the flight and cruise in Northeast Asia. If the international airport runs for 24 hours, it will lead to expand of route to attract more cruise tourists with the optimal condition. Besides, Jeju is an international free city and leisure city attracting worldwide. This is one of the best conditions of home port. Jeju can develop infrastructure of pleasant tourism environment and it is verified its capacity with more than 13 million visitors to Jeju per year. If unique culture of Jeju is combined to create unique cultural travel sites, the location of cruise home port will be solidified.

If cruise industry promotion plan is studied and consumer convenience for shopping is enhanced by the policy support of the central government (new airport) and enactment of decree of the local government of Jeju, Jeju can be the best cruise home port. It will, in turn, lead to activate local and national economy and Jeju will be benefited from population inflow as international free city.

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