Project co-financed by the European Regional Development Fund

SIROCCO Project

Sustainable InteRegional cOastal & Cruise maritime tourism through COoperation and joint planning

MED/1425

WP 3 – Studying

Activity 3.5 – Cruise value chain operational analysis

DELIVERABLE D3.5.3:

CRUISE VALUE CHAIN SOCIETAL IMPACT & DISTRIBUTION

Interreg Mediterranean SIROCCO
Project co-financed by the European Regional Development Fund

Project title	*Sustainable InterRegional cOastal & Cruise maritime tourism though COoperation and joint planning*
Acronym	SIROCCO
Reference number	1425
Starting date	2016/11/01
Closure date	2018/04/30
Short description of the project	With €40 billion economic impact and 6 mil. passengers, cruise tourism plays a key role in Europe and especially in the MED, being the top cruise market and amidst strong socio-economic pressures. As cruise tourism grows, the challenge for the Mediterranean is to exploit its full potential in a sustainable way. SIROCCO has the ambition to provide: 1. An integrated view of the current state of Mediterranean cruise tourism and its impacts 2. A foresight of Mediterranean cruise tourism for the following decades 3. Evidence-based, transferable recommendations on developing sustainable & responsible Cruise Value Chains in the MED 4. Coordinated strategies & policies at regional and transnational level regarding the development of a sustainable and responsible cruise maritime/coastal tourism SIROCCO employs a transnational approach, reflected both in its content and its partnership.
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1 Scope of the document

This report includes final results for the Deliverable D3.5.3 of the SIROCCO project.

The deliverable aims to evaluate the societal impact & distribution of cruise value chain using as example five ports: Civitavecchia, Rhodes, Split, Limassol and Valencia.

All the values and data used in this document are taken from the reports provided by all the port authorities involved in the project.

2 The European Cruise Tourism sector

2.1 Quick Facts

In 2015 the cruise industry in Europe generated a total expenditures value of 16.89 billion of euro. The 64% of this value were concentrated in three countries: Italy, UK and Germany. This is due mainly to the fact that these countries are at the same time:

- Source and destination for cruises and their passengers;
- Location of shipping companies headquarters and crew facilities;
- Location of shipbuilding and repair service facilities;
- Location for provisioning and fuelling of cruise ships.

In Europe are located around 30% of all world cruise passengers. In 2015 around 6.59 million European citizens booked a cruise.

The passengers embarked on their cruises from a European port are 6.12 million and around 5.0 million of these were from European countries, the rest are from outside Europe.

The totality of passengers and crews produces an economic spending impact of around 3.83 billion of euro.

Each passenger spends an average of 61.82 euro at each port visited, while a crew member around 22.99 euro.

In Europe 39 cruise companies are domiciled and they operate 123 cruise ships with a total capacity of around 149,000 lower berths.

The non-European companies that operate in the continent are 23, with 73 vessels and around 100,000 lower berths.

The vast majority of these cruises visits Mediterranean and Baltic regions, and all together touch around 250 European port cities.

In Europe, 4.60 million of euro is the value in spending for the construction, maintenance and refurbishment of cruise vessels in 2016.

European shipbuilding companies have contracts for building around 48 cruise ships.

Cruise lines in 2015 spent around 6.90 billion of euro in European ports for goods and services necessary as supports for their cruise operations.

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All these expenditures generate employment and employee compensation across a wide range of industries and in every country that hosts a cruise ship call port.

The total number of direct job employees in Europe is around 185,476 people (the 37,85% of the global value), while considering also the indirect ones, the total number reaches a value of 360,571 employees.

2.2 Cruise ship traffic in Europe

The European cruise market saw a general growth in the six-years period 2012-2017.
The total passengers' embarkation value is constantly increasing and, in 2017, it reached the value of more than 6.9 million people (Figure 1).

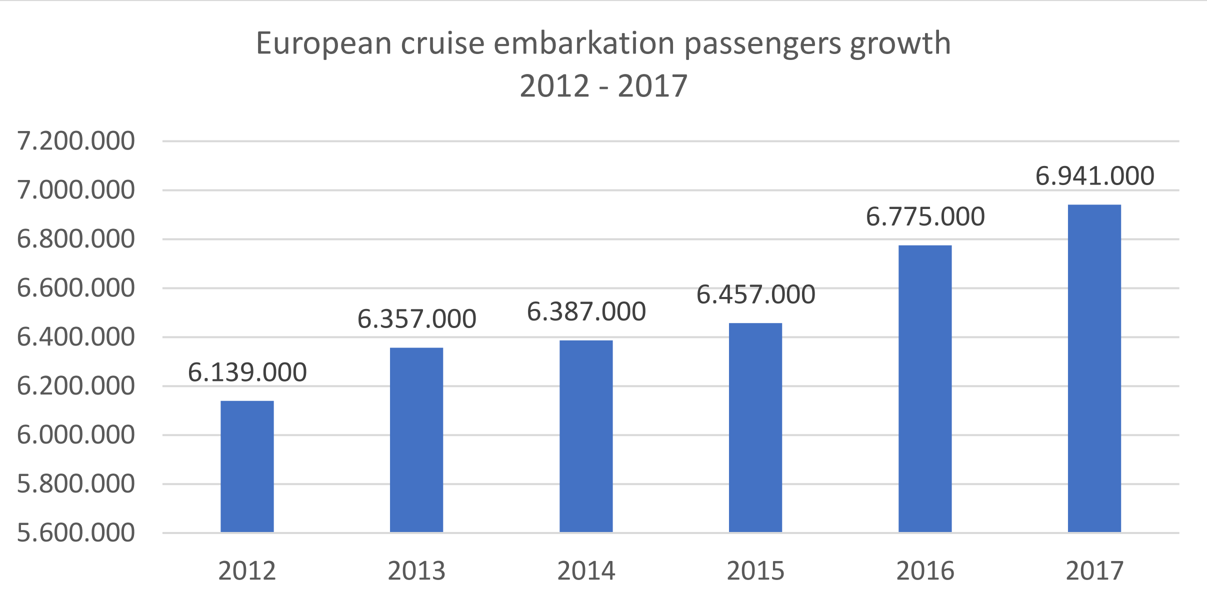

Figure 1: Cruise passengers embarkation growth in Europe

This value represents around 26% of all global value and, combined with the total transit passengers value and the total crew members value, it reaches the final value of 45.88 million of passengers (Figure 2).

It means also a +3.1% compared to the same value of previous year.

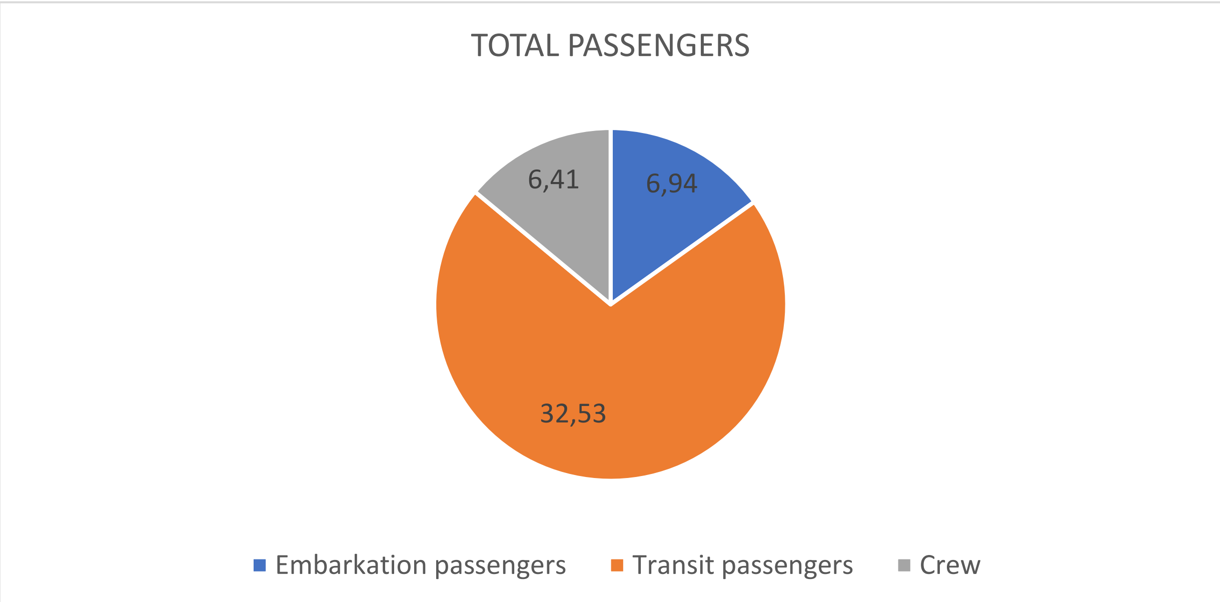

Figure 2: Percentages of embarkation, transit and crew

The Mediterranean cruise area is a fairly self-contained business with 61% of its market directly produced and consumed inside its borders.

Most of the itineraries originate and end within the region.

The Mediterranean area alone produces around 30.5 million of bed days, while the rest of Europe produces 19.2 million of bed days.

The major cruise home ports are:

- In the Mediterranean: Barcelona, Civitavechia, Genoa, Venice and Savona;
- In the rest of Europe: Copenhagen, Hamburg and Southampton.
- The major destination or transit ports are:
- In the Mediterranean: Naples, Marseille, Tenerife, Dubrovnik and Piraeus;
- In the rest of Europe: Bergen, Cadiz, Helsinki, Lisbon and Rostock.

With a total global quantity of 24.4 million crew visits in both home and transit ports, the European harbours alone represent the 26.12% of this traffic, with a value of 6.4 million.

2.3 Economic contribution generated by Cruise Tourism in Europe

Talking about total expenditures generated by cruise tourism sector, this value is composed by the union of three different components: cruise passengers' expenditures, crew members' expenditures and cruise companies' expenditures.

In Europe, passengers spend annually around 4.31 billion of dollars, which represents the 26% of the total global value (16.39 billion of dollars).

Analysing more in deep in this value, it is possible to see that home port passengers represents the 54% of the total expenditures (1.62 billion), while transit passengers represent the remaining 46% (1.98 billion).

Expenditures by crew members account a total annual value of 0.16 billion dollars, that means the 11,42% of the global value.

Expenditures by cruise companies consist of purchases of goods consumed and used on ships, port charges and fees, travel agent commissions, administrative expenses and wages paid to shore side employees and crew among others.

In Europe, its value accounts around 16.22 billion of dollars and it consists of the 40.39% of the total global value.

Summing up all the expenditures in Europe, the total European value runs around 20.69 billion dollars.

The direct cruise tourism expenditures in Europe amount to a value of 20.69 billion dollars, while the direct incomes value in Europe amounts to 5.99 billion dollars.

Compared to the relative global values, these amounts represent the 35.71% and the 33.71% of the total, respectively.

Beyond the direct expenditures, there are also indirect and induced contributions which are generated by the spending of the directly impacted businesses and their employees.

These values considered together generate in Europe a total output of 43.30 billion dollars and total income value of 27.12 billion.

Finally, combining the direct, indirect and induced contributions, cruise tourism in Europe generate an estimated 50.15 billion dollars in total output of goods and services while the total incomes value generated is 12.32 billion dollars.

The total amount of people involved in the sector (direct, indirect and induced) is of 381.426.

3 Cruise Destinations

3.1 The Civitavecchia Cruise Destination

Civitavecchia manages around the 20% of the total Italian cruise traffic and the 9% of all the European one.

In the Mediterranean area its market share is second only after Barcelona, despite its growth rate is greater, 3.5% vs 1.5%.

In the seven-years period 2010 - 2016, the yearly flow of passengers has seen a fluctuating trend with a total average value of 2,693,892.

Civitavecchia is not an important Mediterranean home port but it has an important transit traffic due to passengers interested to visit Rome and its regional cultural heritages.

The average year difference between transit passengers and home-porting passengers is around 41%.

The total number of port calls in 2017 was 693, with a reduction of 140 units compared to 2016.

In 2018 are planned to operate in Civitavecchia 43 cruise companies.

More than 50% of cruises in Civitavecchia are during the "summer" quarter, but in general the traffic is spread all year long:

- February – May: 34.10%;
- June September: 52.60%;
- October – January: 13.30%.

In 2016, the average length of stay for a cruise ship was around 10.34 hours, and the average annual crew members number was 711,382.00.

Regarding the passengers and crew members expenditures, the value for one person are 163 euro and 48 euro, respectively.

Regarding the infrastructures, Civitavecchia is one of the ports most developed for handling cruise traffic.

The harbour can manage simultaneously more than 5 ships together.

There are five quays for cruises and in each of them there is a specific passenger terminal.

Quays length varies from the 150 meters of the shortest one, for only one cruise ship, to the 795 meters of the longest, where can be accommodated more than one cruise ship.

The minimum draft is 7.70 meters, the maximum is 13.5 m, and there are not maximum width and beam limits.

The passengers terminals are five (min surface 800 sqm, max 13,000 sqm) and the maximum distance between one terminal and quay is 60 meters.

The maximum number of passengers that can be handled in one day is 40,000.

3.2 The Valencia Cruise Destination

The development of the cruise sector in Valencia has shown great promise over the past 10 years, passing from a value of 88,170 passengers in 2006 to a value of 403,264 passengers in 2016. In the same period the port calls rose from 98 to 181.

In 2016 each cruise ship carried an average of 2,200 passengers and the percentage division between transit passengers and embarking/disembarking passengers reached values of, respectively, 15% and 85%.

The growth of cruising sector has led to a clearer market segmentation in Valencia where, nowadays, 54% of cruise traffic is represented by Budget & Contemporary vessels while the remaining 46% are Luxury/Premium vessels.

This division is more net if the topic are passengers, where 71% of them are clients of a Budget & Contemporary cruise and only 29% of them come from a Luxury/Premium cruise.

The average docking time of Luxury/Premium ships is around 11 hours, while the average time for Budget & Contemporary cruises is around 9 hours.

In Valencia, currently, there is only one passenger terminal and its use is shared with ferry traffic.

The cruise quays are four with a minimum and maximum length of, respectively, 219 and 395 meters. Draft depth varies between 9 and 12 meters.

Valencia as tourist destination is endowed with important attractions, for example:

- The 39 different local beaches and bathing areas;
- The 5 natural interest protected areas;
- The more than 100 monuments and historic sites declared of cultural interest;
- And the more than 60 art galleries and museum present in the city and in the region.

3.3 The Split Cruise Destination

In 2016 there were 286 arrivals of cruise ships, the number of cruise ships which sailed into the Croatian port was 61 and they operated under 9 different shipping agents. The average number of ships per agent was 6.78.

The total number of embarkations was 367 and total number of disembarkation 512.

The total number of passengers in transit was 277,380 and the average time of stay of cruise ships was 17.5 hours.

The seasonality shows a prevalence of passengers in the three-months period between June and August where are focused the 45.44% of traffics.

Between March and May there is concentrated the 19.48% of passengers, between September and November the 34.34%, while between December and February the traffic is practically zero, with only the 0.63% of annual passengers.

Split is nowadays an important cruise destination thanks to its history as ancient Greek and roman city and, principally, as home region of the Roman Emperor Diocletian that here decided to build up its magnificent palace, nowadays integrated part of the city.

The harbour has only one terminal and its use is shared with ferry traffic.

Berths that can be used also by cruise ships are 10, with a length that varies between 63 and 173 meters. The maximum draft depth is 8.20 meters.

The maximum size allowable for a cruise ship is: 250 meters length, 8.20 meters draft, no air/hight limit.

3.4 The Rhodes Cruise Destination

In Rhodes the number of passengers in last years saw a fluctuating trend, with a final reduction in the years 2015 and 2016:

- 2015: 342,919
- 2016: 319,154
- Difference: -23,765 passengers (= -7.44%).

The same trend was followed also by the number of crew members with a final reduction in the two-years period 2015 and 2016:

- 2015: 147,757
- 2016: 140,380
- Difference: -7,377 crew members (= -4.99%).

The number of ship calls is passed from 388 to 300 (-11.24%) and the and the average staying time of cruises in the Greek port is between 12 and 13.5 hours.

In the last year the number of cruise companies operating in the port was around 40.

The seasonality trends are similar to ones of Split, with around 43% of total passengers concentrated in the period June-August and with the "winter season" (December-February) with practically no traffics (2.86%).

Between March and May it is possible to find the 20% of passengers traffic, while between September and November there is the remaining 34.5%.

The port of Rhodes can accommodate maximum five cruise ships simultaneously and there is only one passengers' terminal. The maximum number of daily passengers manageable is 10,000.

3.5 The Limassol Cruise Destination

During 2016, 98 cruise ship and passenger ship arrivals occurred at the port of Limassol.

According to statistical data the ships stayed at the port for a total of 113 days or 1,245 hours. Among the 78 arrivals, the 76 corresponded to an average stay of 11.82 hours at the port (with a minimum of 6 and a maximum of 40 hours per stay).

The number of ships visiting the port was 23 and they operated under 11 different agents.

As for previous ports, also Limassol has a greater tendency to be a transit port than a home port.

The total number of boardings at the port was 27,414, while the total number of landings at the port was 28,657.

The total number of transit passengers was 44,754.

Between 2015 and 2016 there was a reduction of 20 port calls in the Cypriot harbour, from 98 to 78.

Limassol, with its being a port city in Cyprus, nowadays is an attractive city where it is possible to find a mix of different cultures, attractions, traditions and architectures from Europe and Asia, that lures cruises and invites them to berth in the port for at least 17 hours.

The seasonality shows a concentration of passengers in the so called "winter season" (October - January) when there is focused 60% of total traffic.

The lowest traffic value is in the period June - September with the 5.72% of passengers.

The remaining 32% is spread the four-months period between February and May.

4 The Cruise Value Chain

4.1 Civitavecchia Cruise Value Chain

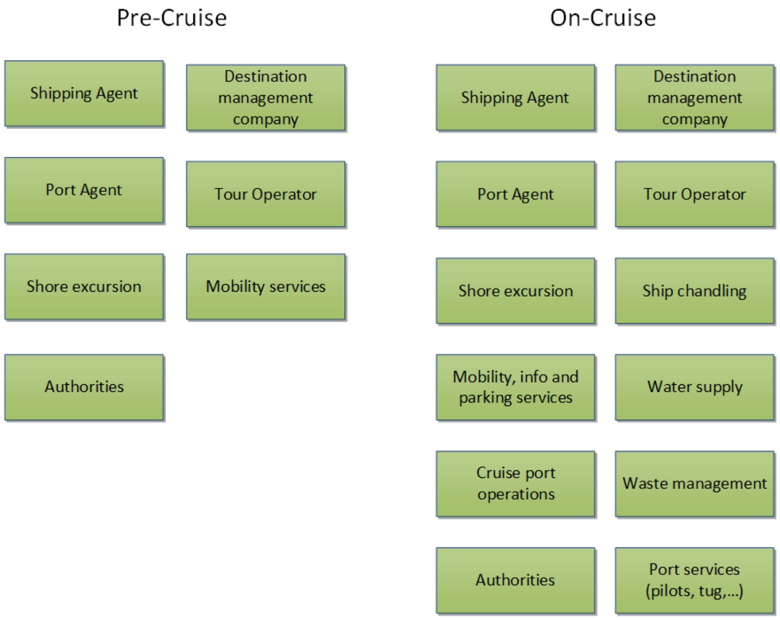

Figure 3: Cruise Value Chain in Civitavecchia

4.2 Valencia Cruise Value Chain

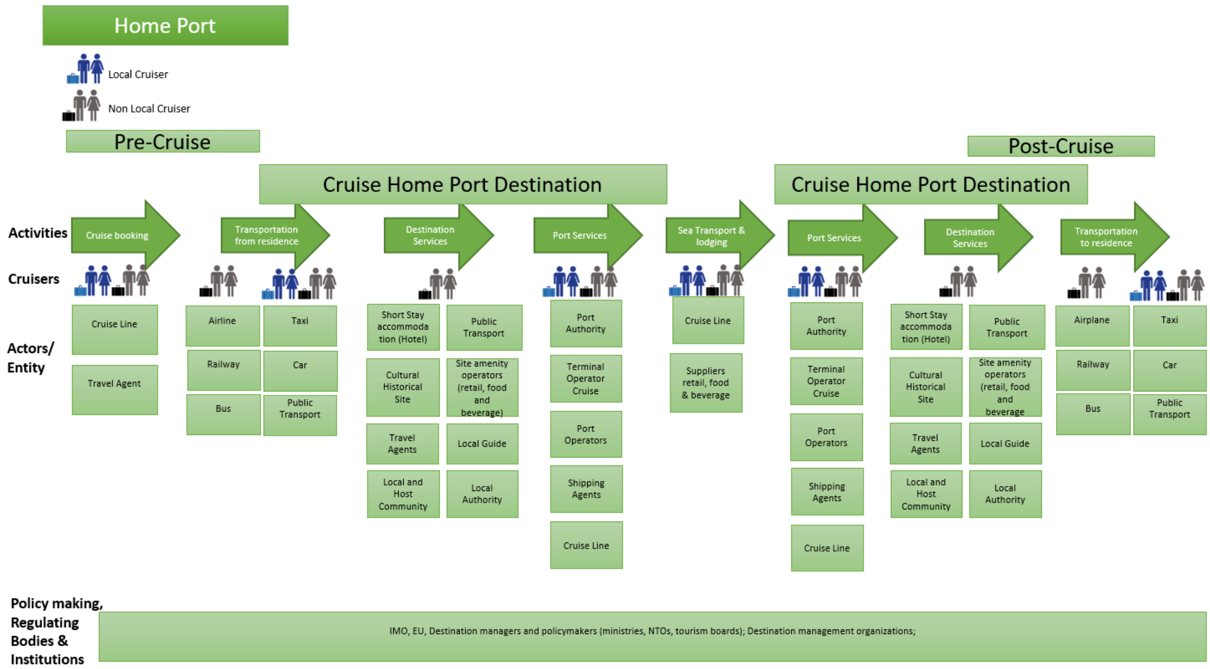

Figure 4: Cruise Value Chain in Valencia - home port

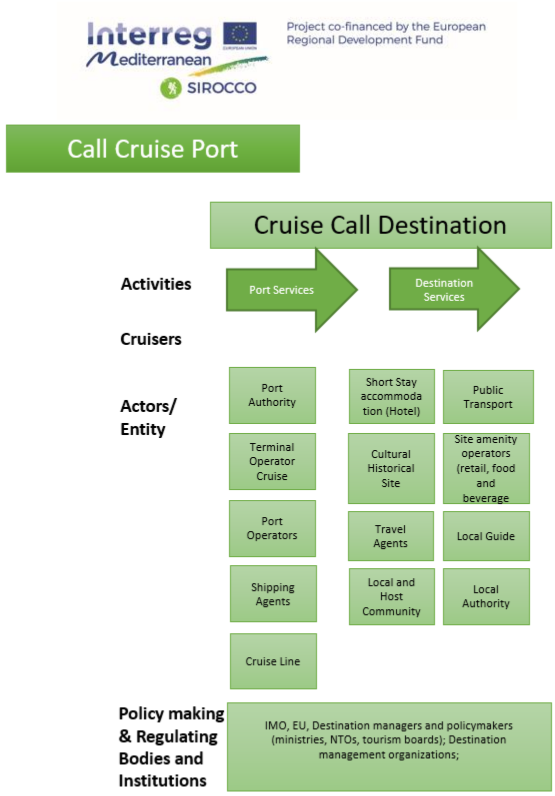

Figure 5: Cruise Value Chain in Valencia - call port

4.3 Split Cruise Value Chain

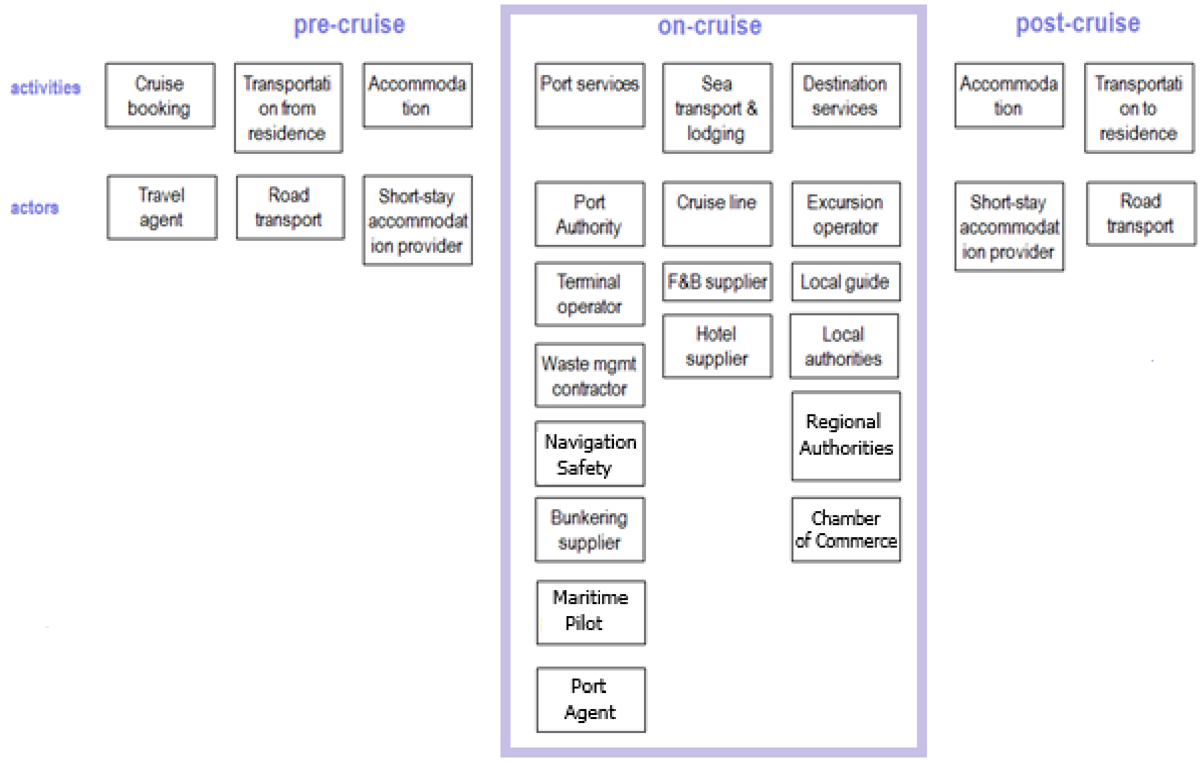

Figure 6: Cruise Value Chain in Split

4.4 Rhodes Cruise Value Chain

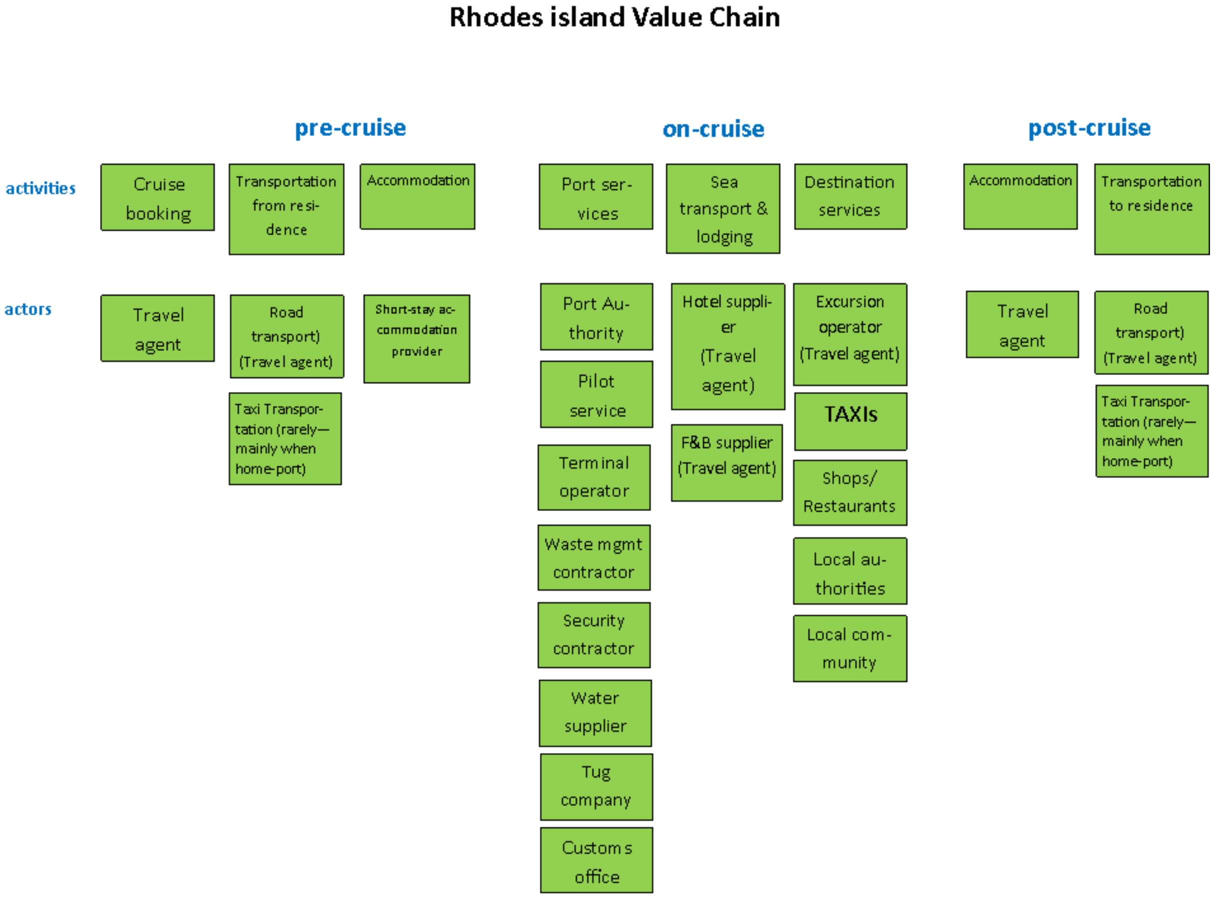

Figure 7: Cruise Value Chain in Rhodes

4.5 Limassol Cruise Value Chain

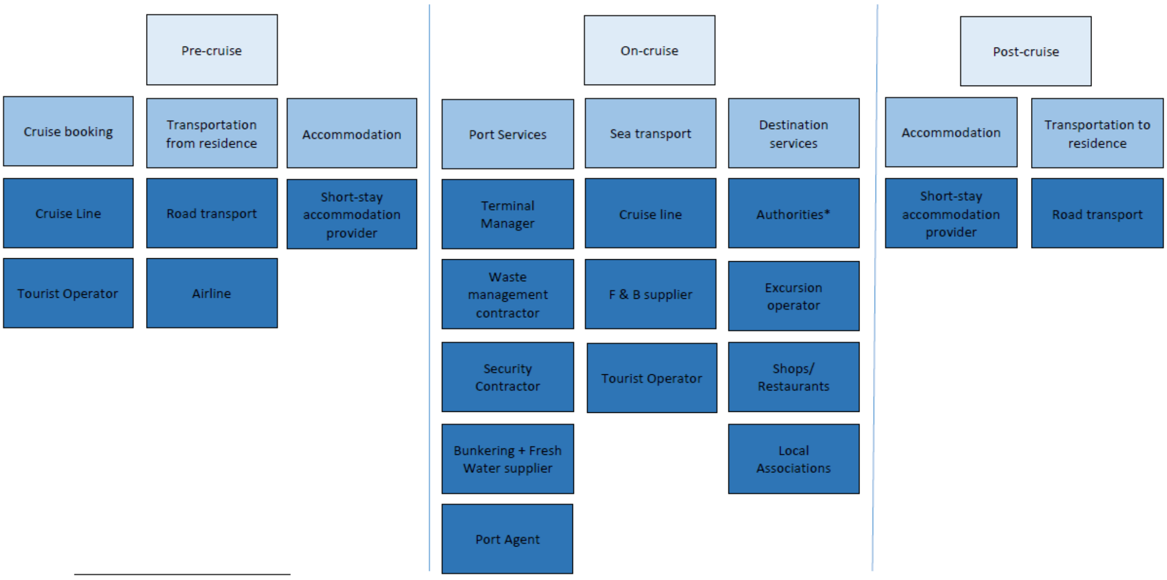

Figure 8: Cruise Value Chain in Limassol

5 Stakeholders involved

In the survey were involved 56 different companies operating in the Cruise Value Chains of the five ports considered for the project.

Stakeholders could operate in the three different phases in which the chain is divided.

5.1 Civitavecchia companies/organizations

Company	Role	Pre-Cruise	On-Cruise	Post-Cruise
ASC	Port Agent			
CAMBIASO E RISSO	Shipping Agent Shore Excursion			
DOCK&DISCOVER	Port Agent Shore Excursion			
FEPAG LA ROSA	DMC Shore Excursion			
BELLETTIERI & C.	Shipping Agent			
MEDITERRANEA	Ship Chandling			
PORT MOBILITY	Mobility, info and parking services			
PORT UTILITIES	Water Supply			
RTC	Cruise port operations			

Figure 9: Stakeholders in Civitavecchia

5.2 Valencia companies/organizations

Company	Role	Pre-Cruise	On-Cruise	Post-Cruise
AGOCV	Destination Services			
APV	Port Authority			
DoYouBike	Destination services			
Chamber of Commerce	Destination services			

Perez & Cia	Port and destination services			
Transmediterranea	Terminal operator			
Valencia Convention Bureau	Policy making			
Valencia Guìas	Destination services			

Figure 10: Stakeholders in Valencia

5.3 Split companies/organizations

Company	Role	Pre-Cruise	On-Cruise	Post-Cruise
MSC Krstarenja	Port agent			
ADRIATIC DMC	Port and destination services			
ATLAS	Destination servies			
CIAN	Waste management, Port services			
CISTOCA	Waste management			
Grad Split	Destination services			
Chamber of Economy	Destination services			
Jadroagent	Portservices			
Split Port Authority	Port services			
Plovput	Port services			
Pomorski peljar	Pilotage service			
SORDES	Waste management			
Split-Dalmatia County	Destination services			
TZ SDZ	Destination services			

Figure 11: Stakeholders in Split

5.4 Rhodes companies/organizations

Company	Role	Pre-Cruise	On-Cruise	Post-Cruise
Rhodes Port Authority	Port Authority			
Chamber of Commerce	Destination services			
Water supply company	Water supply			
Cooperative Radiotaxi	Destiantion services and transportation			
Medieval Rose	Destination services			
Union of Store Owners	Destination services			
Antipollution SA	Port Services			
GEM Travel	Destination services			
Custom office	Port Services			
Security Services MON. S.A.	Port Services			
Carayanides Travel	Shipping Agent and Destination services			
Municipal Port Fund	Port services			
Dodekanisiakai Rymoulkiseis Afoi Pipinou	Tug service			
Georgiadis	Destination services			

Figure 12: Stakeholders in Rhodes

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5.5 Limassol companies/organizations

Company	Role	Pre-Cruise	On-Cruise	Post-Cruise
World Cruises PLC	Cruise representant			
Cyprus Tourism Organization	Destination services			
Limassol Tourism Board	Destination services			
Lofou Association	Destination services			

Chamber of Commerce	Destination services			
Salamis Cruise Lines	Cruise representant			
Agios Tychonas	Destination services			
Cypromar Ltd	Tourist operator			
Celestyal Cruises	Cruise representant			
DP World Limassol	Terminal manager			

Figure 13: Stakeholders in Limassol

Combining, structuring and analysing data reported into surveys by companies, it was found:

- Companies operating (also or exclusively) into "Pre-Cruise" phase are 18;
- Companies operating (also or exclusively) into "On-Cruise" phase are 52;
- Companies operating (also or exclusively) into "Post-Cruise" phase are 14;
- The 22% of companies (12) operate in all three phases;
- The 4% of companies (2) operate both in phase "Pre-Cruise" and "Post-Cruise";
- The 5% of companies (3) operate both phases “Pre-Cruise” and “On-Cruise”;
- The 2% of companies (1) operate only in “Pre-Cruise” phase;
- The 67% of companies (37) operate only in “On-Cruise” phase;
- No one company operates in phases "On" and "Post" together and in phase "Post-" alone.

6 SOCIETAL INDICATORS

- HIRED EMPLOYEES IN THE LAST 3 YEARS

Companies were invited to report the number of hired people in last three years for professional activities related to cruise business operations inside ports.

- SATISFACTION OF DESTINATION RESIDENTS

Companies were asked to report their ideas, opinions, conclusions about the satisfaction of destination residents about the cruise tourism present in their territories of residence.

Options to choose between:

1. Very dissatisfied
2. Dissatisfied;
3. Neutral;
4. Satisfied;
5. Very satisfied.

- Accessibility of public transports

Companies were exhorted to report their opinion about the performances of public transports inside port area. Accessibility is a fundamental component for attracting tourists to shore excursions during time in which cruise ship is docked at port.

Options to choose between:

- Scarce;
- Fair;
- Good;
- Very good;
- Optimal.

- Accessibility of ports infrastructures

Accessibility of port infrastructures inside harbour is fundamental in order to maximise performances of cruise experience and time inside port. This is the reason why companies were invited to quantify, considering their experiences, the level of accessibility and availability of infrastructures present in harbour area.

They could choose between options:

- Scarce;
- Fair;
- Good;

- Very good;
- Optimal.

- Intensity of cultural events

Tourism is not only for cultural heritages present in the location, but very often people are attracted to visit a destination also for the cultural/artistic events that take place there. Companies were invited to give a judgment regarding the intensity, frequency and availability of cultural events present in that cruise destination.

The evaluation options were:

- Scarce;
- Fair;
- Good;
- Very good;
- Optimal.

For most of indicators analysed, together with their effective and practical value reported by stakeholders involved into project, it was asked also to quantify the importance value of the single indicator for the activities carried out into cruise value chain.

This in order to understand how much is the impact and the influence of these parts, phases and components, directly from the subjects that everyday practice them into the port activities.

For example, a single indicator could have a low economic impact over all chain, but it could be fundamental for the progression of the entire working program.

7 QUESTIONNAIRES RESULTS

7.1 HIRED EMPLOYEES IN THE LAST 3 YEARS

The cruise sector is a branch of the tourism business that generally has never suffered a crisis period. This is why the 98% of companies involved in survey answered whit positive indication about people hired in last three years. Only the 2% answered with a reduction of their workforce in the same period (Figure 14).

The 88% of companies stated as range of hired people in last three years the interval 0 – 10 (Figure 15).

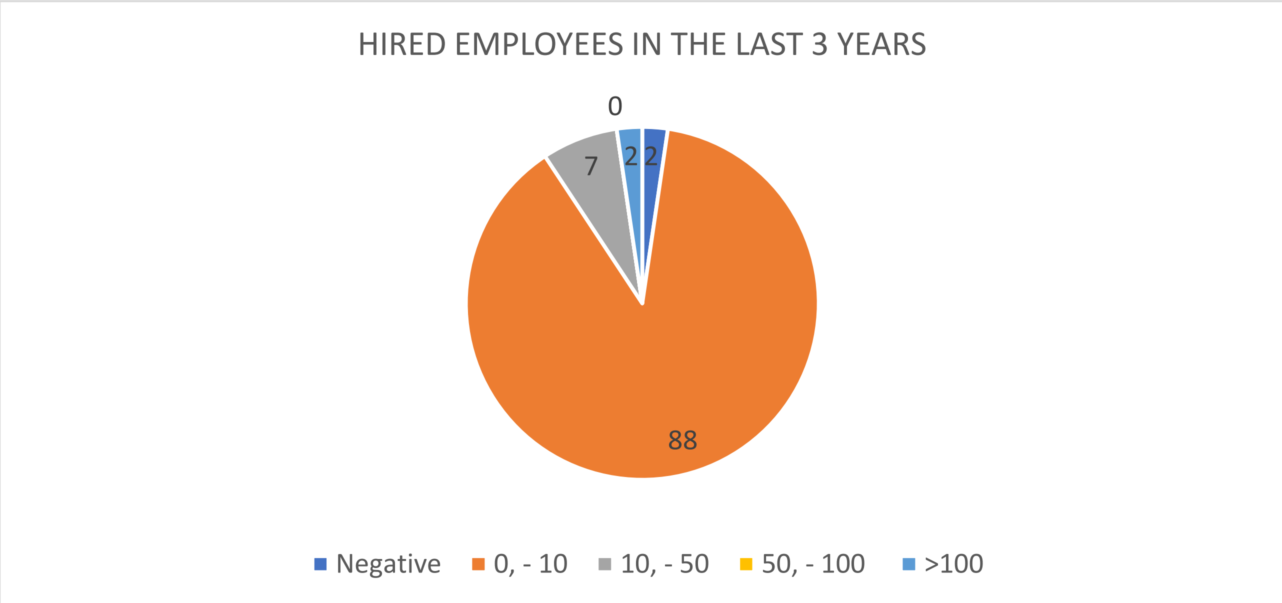

Figure 15: Hired employees in the last three years

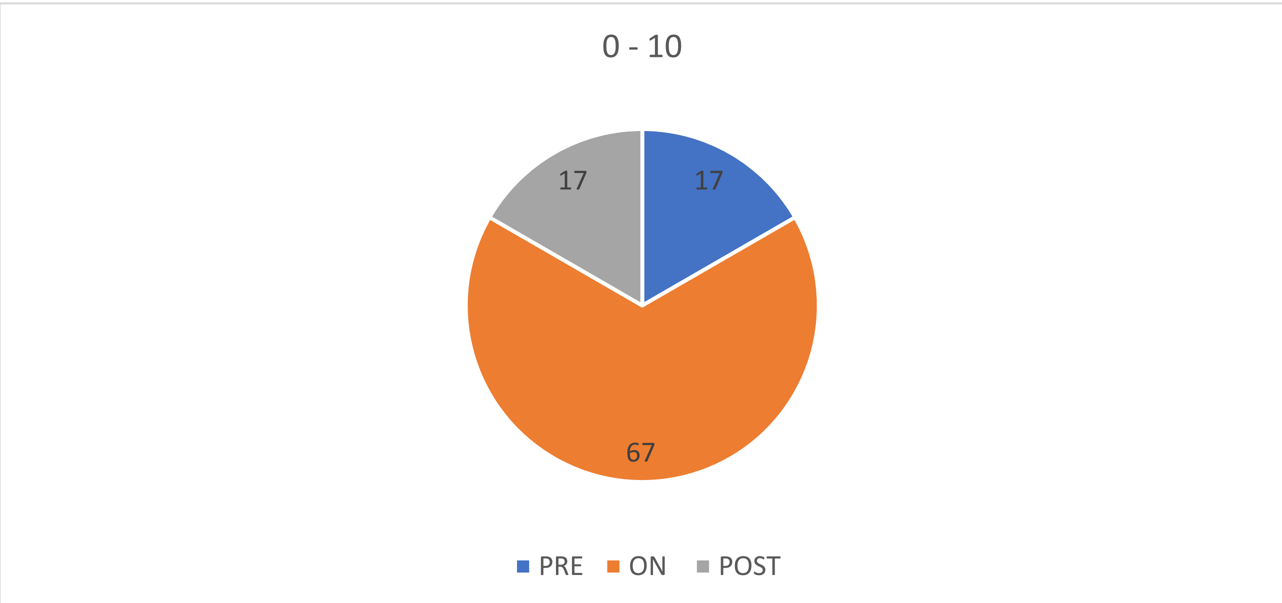

Figure 14: Composition of companies that hired employees in the percentage 0-10%

7.2 SATISFACTION OF DESTINATION RESIDENTS

As in many tourism destinations the "satisfaction" of local residents for the touristic business is a wide and heavy topic, also in the 5 ports selected this is a difficult argument. The survey results, in fact, show a companies opinion very varied, with a prevalence of "neutral" that got the 38%. Second in the ranking, with the 23%, there is "Very satisfied" (Figure 16).

Over the 60% of companies that chose "neutral" are operators of the phase "On-cruise" (Figure 17).

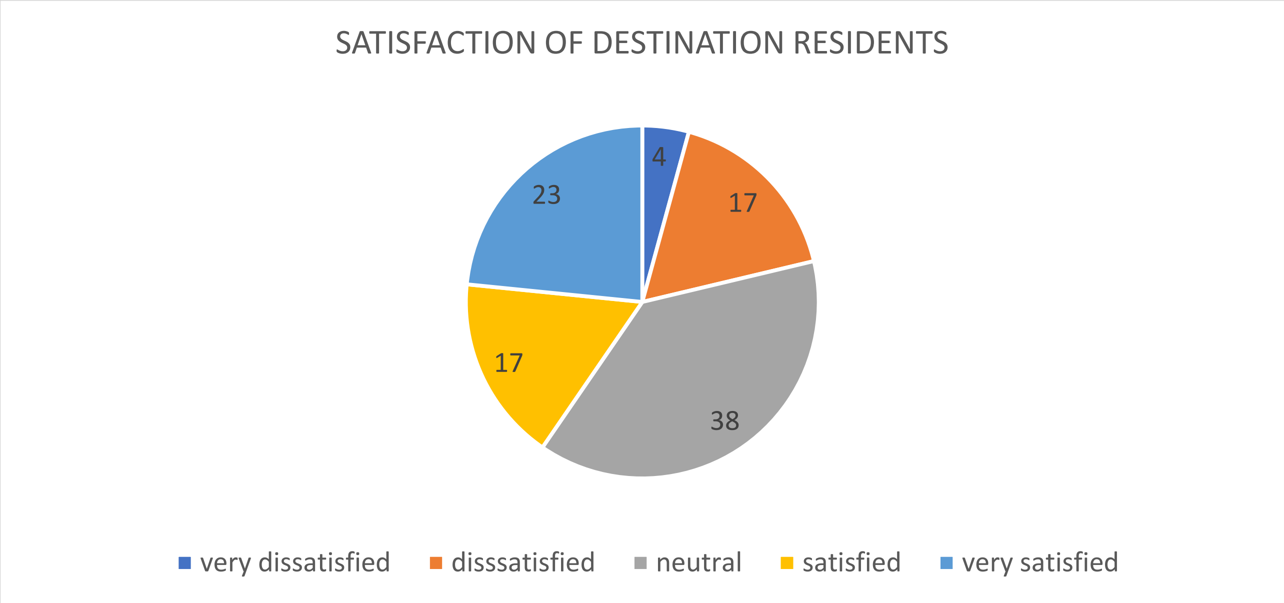

Figure 17: Satisfaction of destination residents

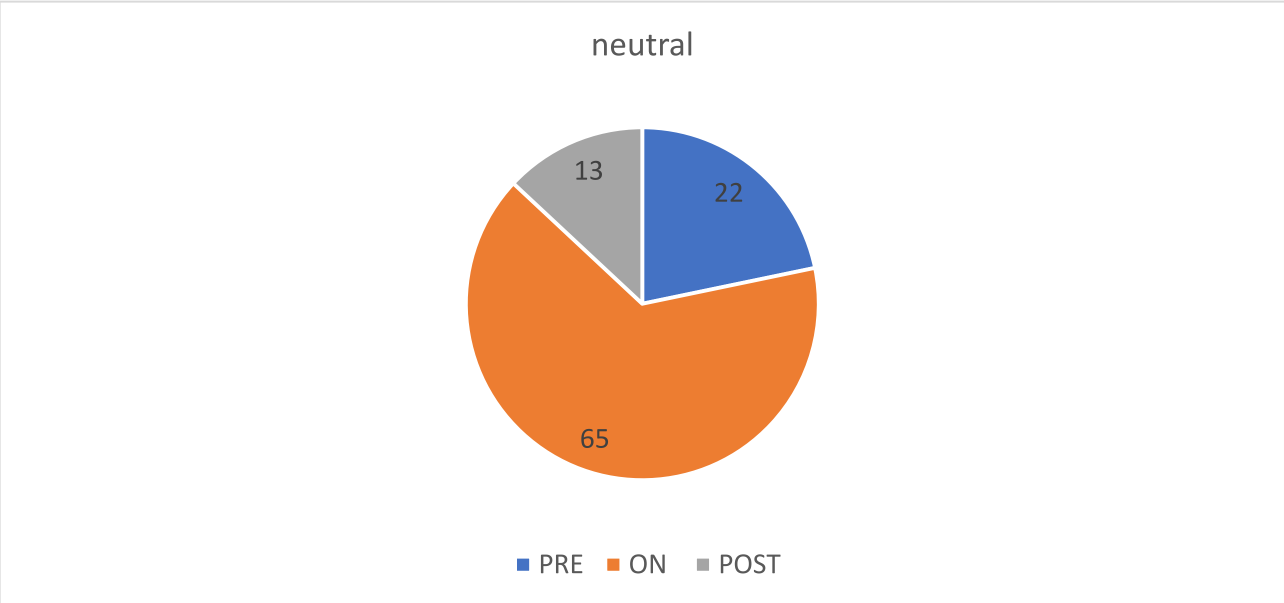

Figure 16: Composition of companies that indicated as "neutral" the satisfaction

Despite the variegated results of survey, compact is the block of companies that, with the 54%, indicated as "Very important" this indicator (Figure 18).

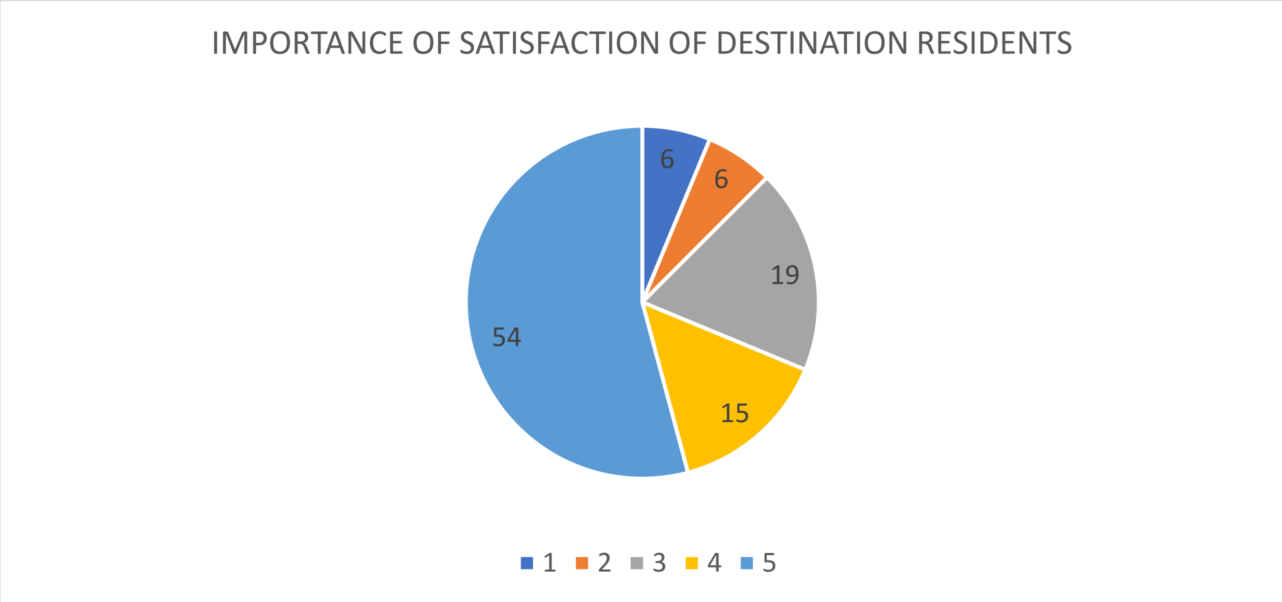

Figure 18: Importance of the indicator "Satisfaction of destination residents"

7.3 ACCESSIBILITY

It is interesting to notice that, despite it is world widely well-known how much is important the accessibility for a port (equally tourist and industrial), from the survey results does not come out a positive general consideration of the situation in the ports selected.

For both the kinds of accessibility analysed, there is a wide percentage of stakeholders that gave a low/negative evaluation.

7.3.1 ACCESSIBILITY OF PUBLIC TRANSPORTS

The typical public transports infrastructural gap, often present into Mediterranean ports, is here clearly demonstrated by the provided stakeholders negative judgements. Adding together the percentages of "Scarce" and "Fair" it is reached the total value 61%.

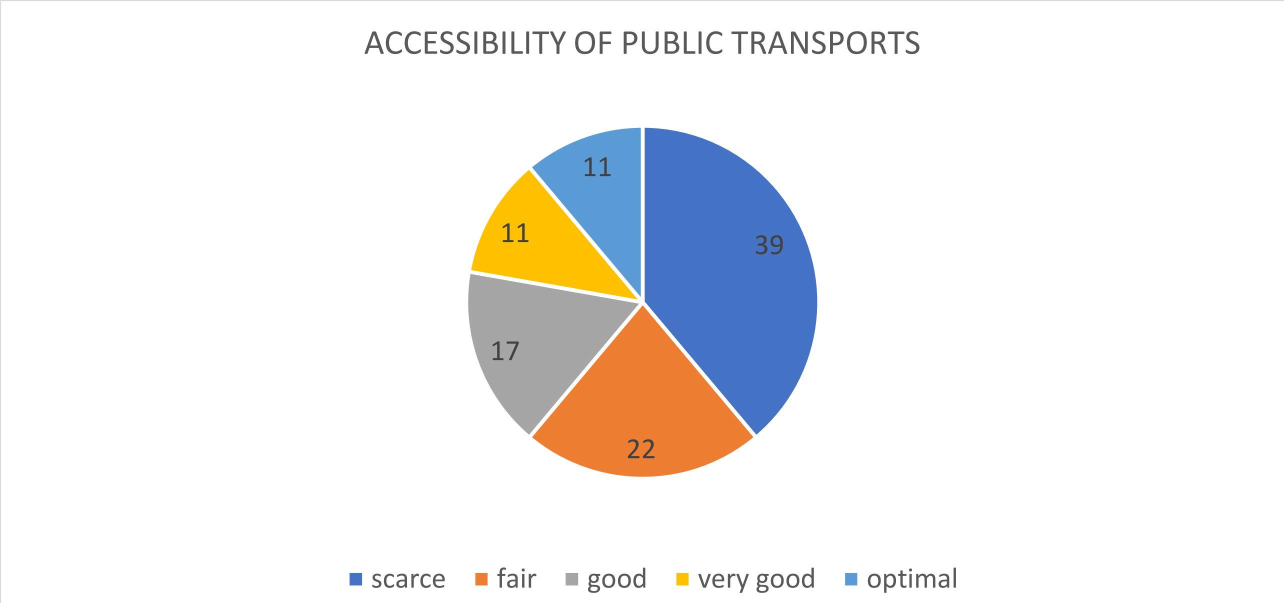

Figure 19: Accessibility of public transports

With the 59% of stakeholders, the phase "On-cruise" is the most represented in the group of ones that gave the importance evaluation "Scarce".

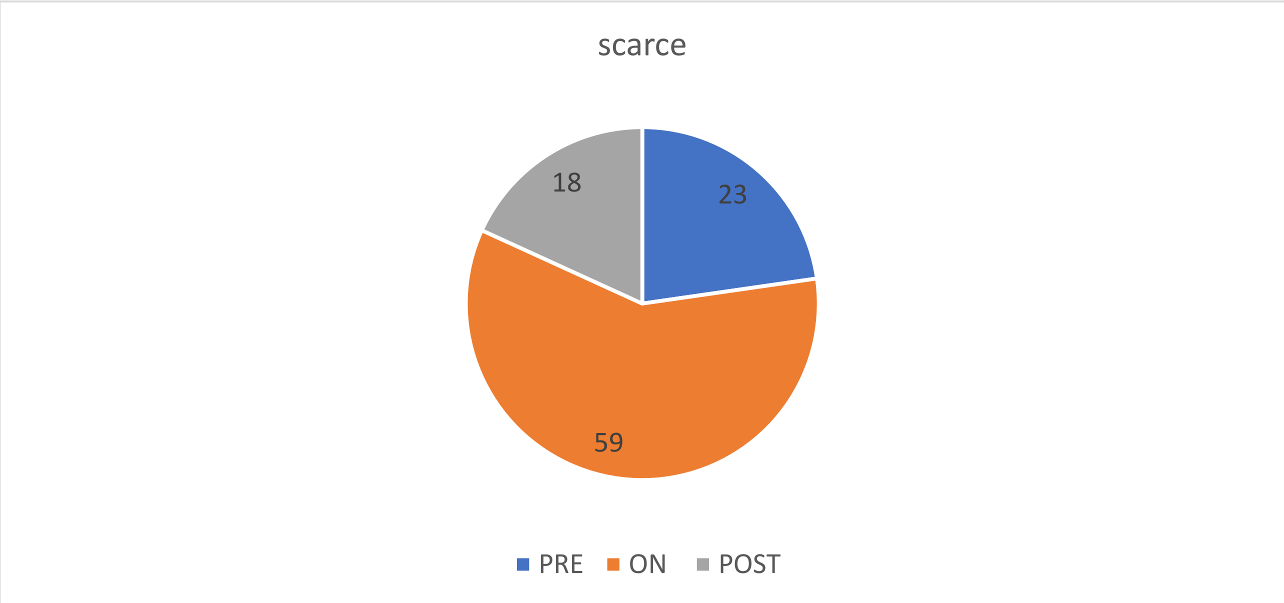

Figure 20: Composition of companies that indicated as "scarce" the accessibility of public transports

Despite the low quality evaluation given, most of stakeholders understood the importance of this kind of accessibility, in fact the 62% of them gave importance evaluation 5, "Very important".

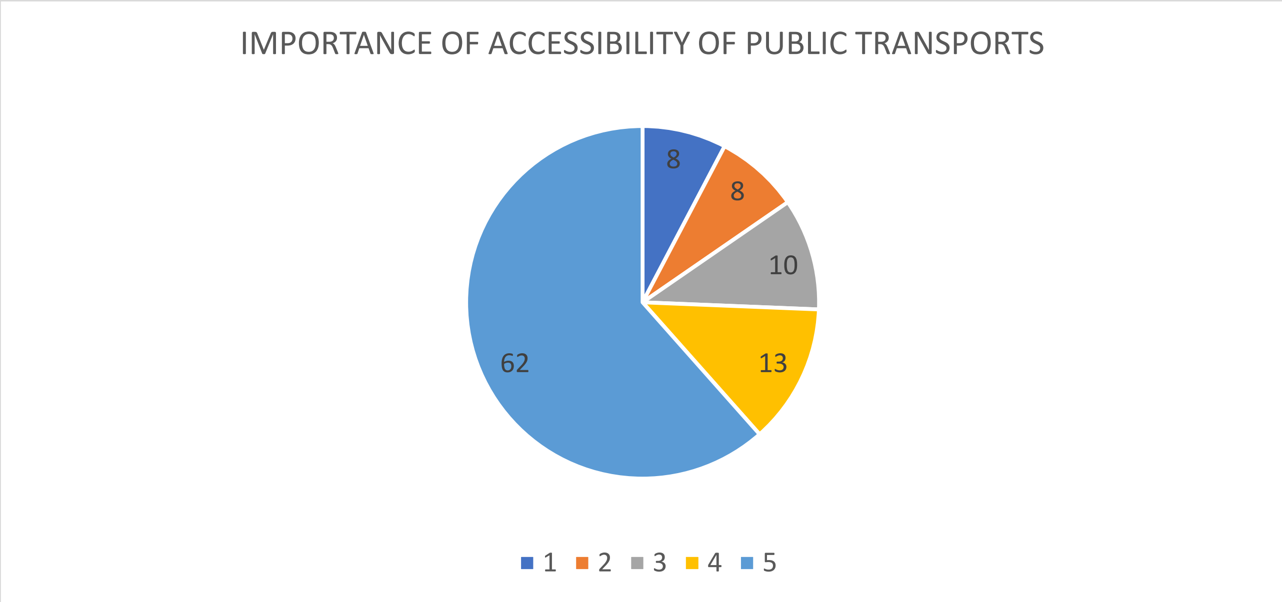

Figure 21: Importance of the indicator "accessibility of public transports"

7.3.2 ACCESSIBILITY OF PORTS INFRASTRUCTURES

The accessibility problem present in the ports analysed does not regards only public transport systems and infrastructures, but it is general for all infrastructures inside harbour borders. Most of ports are composed by infrastructures anachronistic and outdated, often designed when there was not the present modern vision of accessibility.

This is why the survey results give a fragmented view of the situation with the evaluation level "Very optimal" that is only the fourth in the final ranking, with only the 17% of votes.

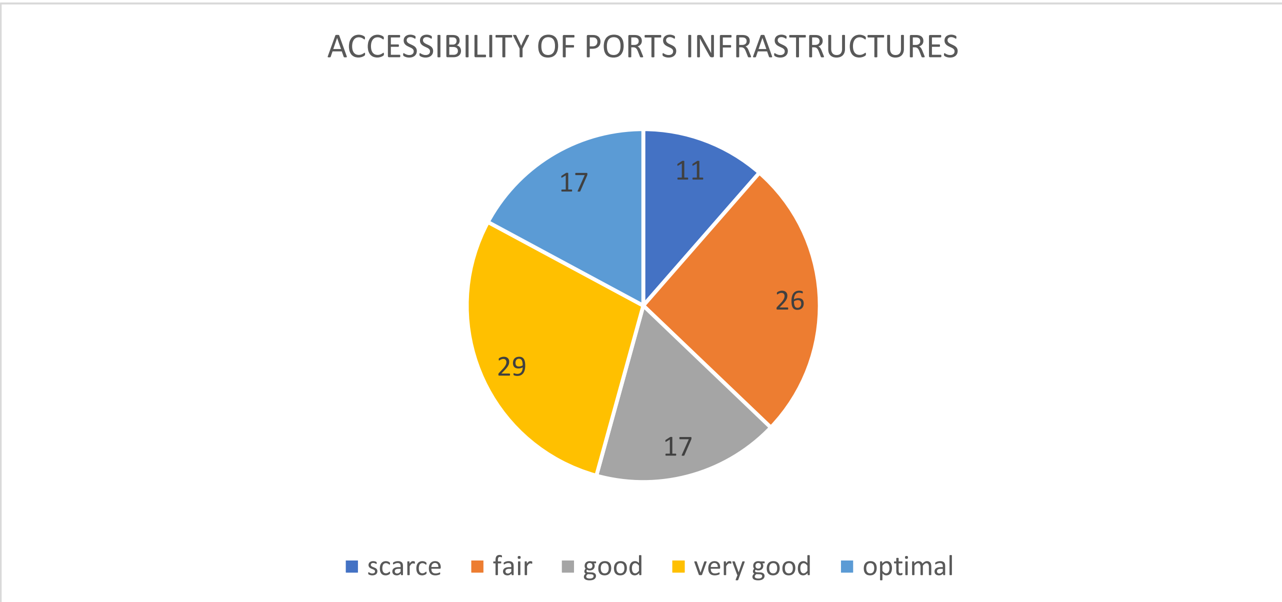

Figure 22: Accessibility of ports infrastructures

As for the other kind of accessibility, also for this one there is a high awareness from the stakeholders regarding the importance of the "accessibility" concept and this is evident in the 55% of votes that the importance indicator 5 (Very important) received.

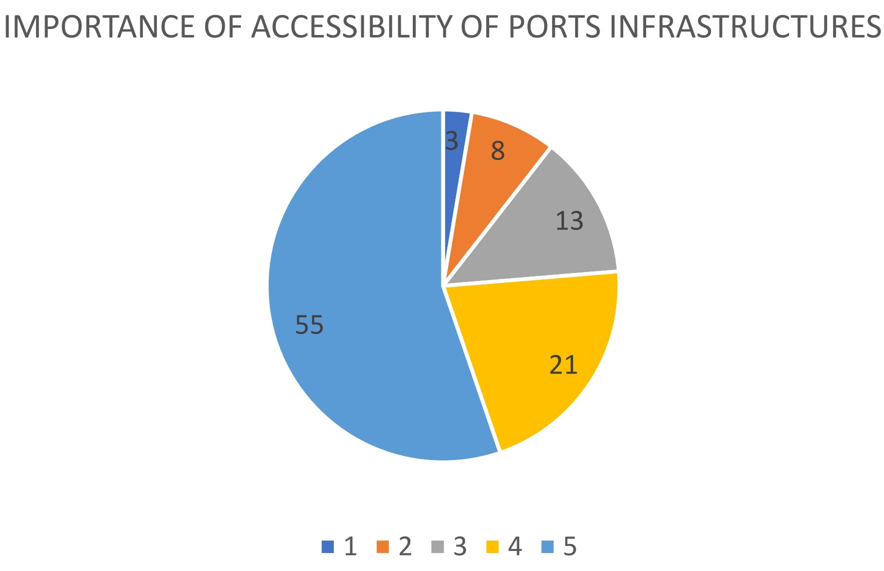

Figure 23: Importance of the indicator "accessibility of port infrastructures"

7.4 INTENSITY OF CULTURAL EVENTS

A large touristic traffic as the cruise one should be a reason for promoting, increasing and incentivizing events, especially cultural ones. Elements like this are necessary because could make the port city and its surrounding area more attractive.

This looks as not happening in the ports analysed for the project. Checking values reported by stakeholders, the 53% of them consider the intensity of cultural events organised in their ports as "Scarce".

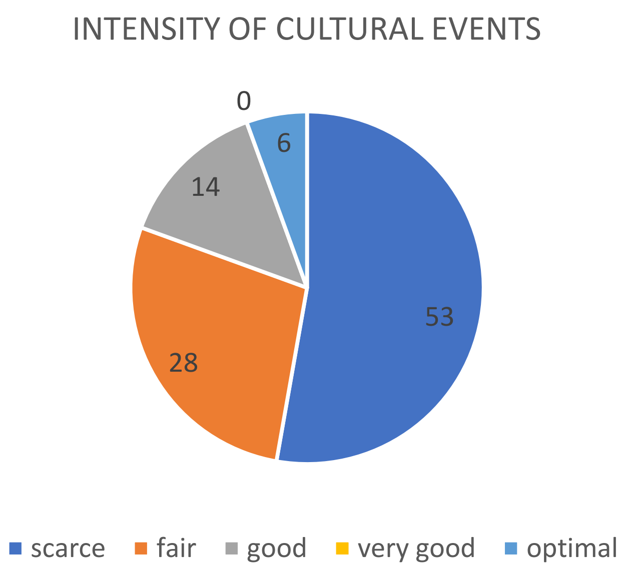

Figure 24: Intensity of cultural events

As for the previous indicators, also in this one the greater amount of stakeholders that gave the judgment finally resulting as principal (Scarce) are members operating in the "On-cruise" phase.

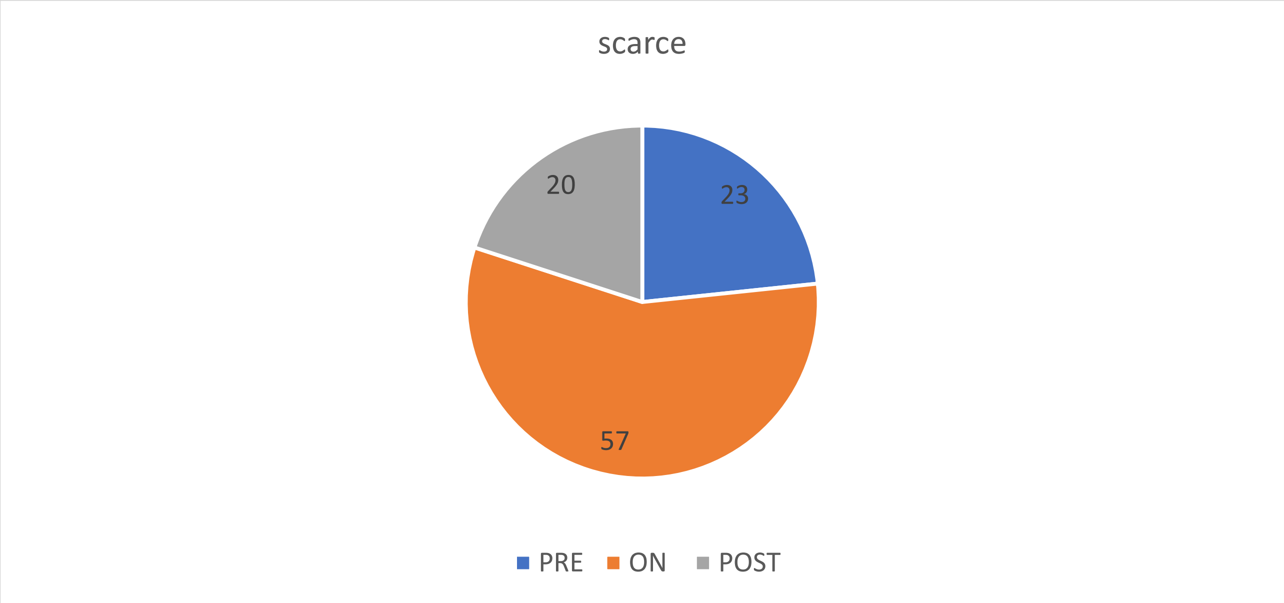

Figure 25: Composition of companies that indicated as "scarce" the intensity of cultural events

Asking to companies the importance level of this indicator for them, from the answers stands out a situation in which at the head of ranking there are the two opposite judgments: “very important”, with the 39%, “Not important”, with the 25%.

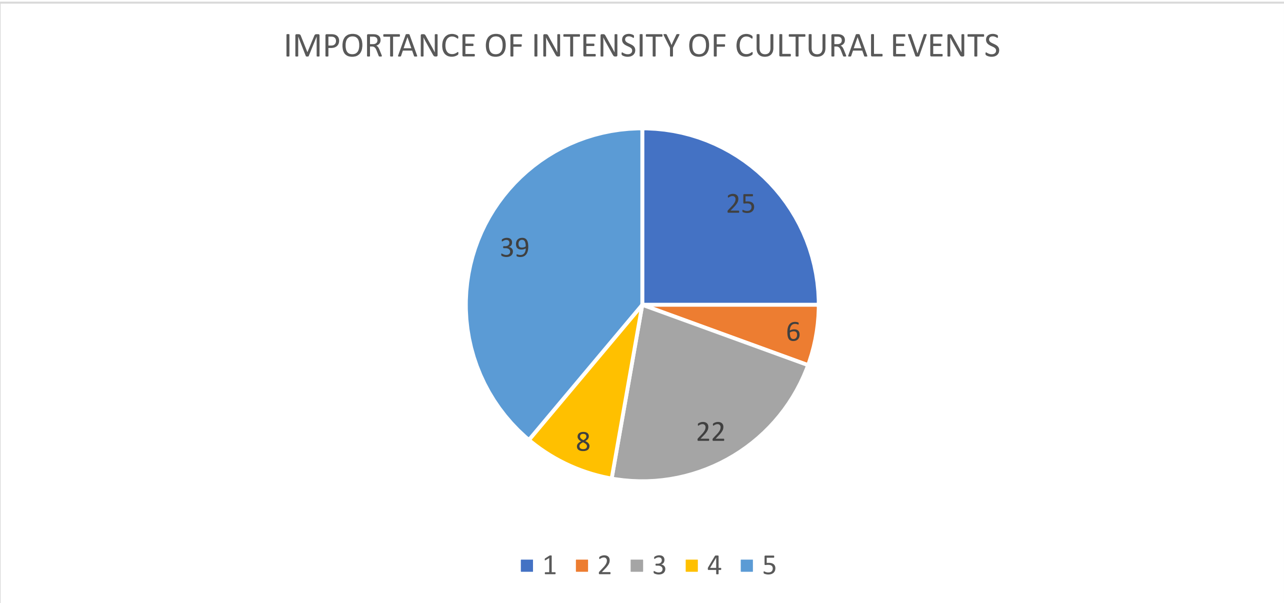

Figure 26: Importance of the indicator "Intensity of cultural events"

CONCLUSIONS

- The 98% of stakeholders involved reported a positive number of hired people in last three years. The most indicated hired people interval is 0-10. Only the 2% of companies indicated a negative number, layoffs.
- The residents' satisfaction for the tourism situation in their cities and regions is a heavy and wide argument. From the surveys gathered come out a variegated situation with a prevalence (the 38%) of "Neutral" opinions.
- Thinking about the influence of this indicator all over the business, the 54% of stakeholders gave, as importance indication, the value 5 (Very important).
- Both kinds of accessibility evaluations inside the analysed harbours gave disappointing results.
- Adding together all negative or quite negative evaluations, the Accessibility of Public Transports and the Accessibility of ports infrastructures get contrary judgments with percentages over 50%. Despite these negative percentages, it is possible to notice that most of stakeholders understood the relevance of the accessibility concept. This is why, for both the indicators, over the 50% of votes (54% and 62%) are for "Very important".
- The intensity of cultural events as magnet for attracting new tourism is not yet a fully understood concept. For this reason, the 53% of stakeholders indicated as "Scarce" the current existing intensity. About the importance of this indicator, it is curious to see that as first and second of ranking are the two opposite evaluation indicators: "Very important", with the 39%, and "Not important", with the 25%.
- For all the indicators analysed, the most representative group of companies that answered the surveys, is the one composed by entities operating in the "On-cruise" phase.