Cruise Tourism Development in Valencia (Spain): Stakeholders' views and residents' attitude

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Abstract

Objectives – Cruise tourism in the Mediterranean area represents 12% of the overall cruise industry, with Italy ranking second after Spain. So far, several papers have discussed costs and benefits of this economic activity on destinations, categorizing its impacts in three main areas: economic, environmental and socio-cultural effects. There are also some published papers aimed at analyzing residents' perceptions of cruise tourism development, However, it could be argued that knowledge on this topic for the Mediterranean area still needs to be further expanded, especially in some emerging cruise ports as Valencia, the third largest city in Spain. This paper aims at exploring and contrasting opinions on cruise tourism development from three different groups of stakeholders: liners consignees, incoming agencies and residents. This combined approach (three targets within the host population and two different techniques) offers an appraisal for better understanding the potential competitive position of Valencia as a cruise destination.

Methods – A two stage methodological process was adopted: a qualitative approach targeting key informants of the cruise industry in Valencia (N=8) through on line interviews, followed by an exploratory quantitative survey on residents perceptions and attitude toward cruise tourism development (N=126)

Results – Findings show that all key stakeholders are expressing an overall positive attitude toward the cruise tourism development. Further they suggest several actions that could be adopted to enhance the attractiveness of Valencia as a cruise tourism destination and to increase the favorableness of residents' likelihood toward cruise tourism development.

Conclusion – Perceptions of both local key stakeholders and residents and their attitude towards the impact of any proposed tourism development model should be taken into account when planning the future of a cruise tourism destination. Local government and policy makers should make some investments to eliminate the weakness that Valencia currently shows, based on the key stakeholders' views, as a tourism destination and would need to run internal marketing and communication activities to increase the favourableness of residents' attitudes toward tourism delivering tailored messages which demonstrate the positive impacts of cruise tourism over their life.

Key words: Cruise tourism development, Valencia, Key stakeholders, Community perspectives, residents' support.

1. Introduction

On a global level, the cruise industry is relatively "new" (Chin, 2008). Originating in the early 1970s in Miami for cruises throughout the Caribbean, in the late 80s this industry had a important development, having an indicator in the construction of new cruise ship vessels for tourism (Hernández, 2008; Salvadó, 2010). The global demand is increasing in speed as the shipyards. In the period 2010-2014, 29 new cruise vessels are predicted, providing 850,900 new beds, with a total investment of 13.800.000.000 euros (Wild, 2010). The cruise industry represents a significant part of the international worldwide tourism, corresponding to 1.6% of the total tourists and 1.9% of the total number of nights (Brida and Zapata, 2010). According to the Cruise Lines International Association – CLIA, (2008), the average annual growth rate in the number of worldwide cruise passengers for CLIA members was 7.4% in the period from 1990 to 2007.

As a result, nowadays, cruise tourism is growing faster than any other sector of the tourism industry (Chin, 2008). As a consequence, understanding the mechanisms that underlies the success of cruise tourism has become a crucial issue both for practitioners and researchers. In the last four decades, the cruise line industry has been able to create a new market where none existed before (Chin, 2008; Salvadó, 2010). The ability to maintain these rates of growth in the last two decades, without showing signs of fatigue, has been the result of decisive investments by cruise operators in innovation and constant improvement. But, what are the reasons behind this highly positive tendency? What makes tourism cruise market different from other tourism products? Academic research can help answering such questions, as the stakeholders that surround cruise tourism market are diverse and cruise tourism consumer behavior is highly idiosyncratic and complex (Hung and Petrick, 2011; Li and Petrick, 2008).

The main difference and advantage from land-based tourism is that cruise ships are mobile and can be moved from a region of declining demand to one of growth. They can also be modified to suit the needs of niche markets (Butler, 2008). This flexibility allows the cruise industry to cope with the development of tourism demand and economic conditions. In fact, the strong growth of the European cruise industry has continued despite the global economic slowdown. In 2011, the total contribution of the global cruise industry to the European economy rose to a record €36.7 billion, from €35.2 billion in 2010 (European Cruise Council, 2012b).

Among European countries, Italy and Spain dominate home porting: their destinations can reap generally greater economic benefits, since passengers usually spend more at a homeport than at a port of call (European Cruise Council, 2012a). Among them, Valencia´s Port (SPAIN), is a partial home port, since before it was considered only as a call port, and now it is already providing home port services (Spadoni, 2010). Specifically, in Valencia, the cruise industry has dramatically grown in the last decade: going back in time, in 1999 there were only 12 calls up to 203 calls in 2011, so that, nowadays Valencia is the sixth most important cruise destination in Spain (Turismo Valencia, 2010, 2011).

One of the relevant issues for the development of a reliable cruise industry in a destination relies on community's perspectives. Local stakeholders and resident's attitudes towards cruise tourism development remains crucial and have been the subject of recent academic researches (e.g. Brida, Del Chiappa, Meleddu and Pulina, 2012a, Brida, Del Chiappa, Meleddu and Pulina, 2012b.) This paper aims at analyzing a thriving cruise tourism sub-sector in Valencia, by proposing a twofold objective. First, to explore the opinions of key informants of the cruise industry (liners consignees and the incoming agencies) in order to investigate their views toward the idea of Valencia being able to consolidate itself as a cruise ship destination. Second, to analyze residents' perceptions and attitude toward cruise tourism development in their city by means of an exploratory survey. To achieve this aim of exploring and contrasting opinions on cruise tourism development from three different groups of local stakeholders: a mixed method combining qualitative and qualitative approaches was designed. This combined approach (three targets and two different techniques) offers a chance both for researchers and practitioners for better understanding the potential competitive position of Valencia as a cruise destination.

After having introduced the study, the paper is organized as follows. Section 2 describes the theoretical framework and offers an overview of prior research undertaken on cruise tourism development and community perspectives and, then, of Valencia cruise market, with figures and data from secondary sources. Section 3 describes research aims and methodology and section 4 illustrates the findings of both qualitative and quantitative study. Sections 5, 6, 7 and 8 discuss the findings and limitations of the study, thereby setting out the direction of future research and highlighting some managerial implications for destination marketers and policy makers involved and interested in the future of Valencia as a cruise destination.

2. Theoretical framework

2.1. Cruise tourism development and community perspectives: a literature review

Cruise ships generate several impacts (both positive and negative) on the hosting destination: economic, politic, environmental and socio-cultural (Brida and Zapata, 2010; Brida, Riaño and Zapata, 2011; Johnson, 2002; Scherrer, Smith and Dowling, 2011; Eijgelaar, Thaper and Peeters, 2010). Average expenditure per person depends on the destination and on the category of the port: homeport or port of call (Brida and Zapata, 2010) with passengers' expenditure being higher in homeport cruise destinations than in a port of call (Mckee, 1998). Further, cruise tourism development generates also promotion/marketing effects. As regard to the latter, prior research showed that passengers during their visit to a cruise destination have the opportunity to learn about and experience the local tourism attractions. This could then influence their likelihood to return to visit the destination as independent land tourists and/or to recommend the destination to friends and relatives, thus originating the so-called showcasing (Gabe, Lynch and McConnon, 2006).

Recently, academic research has been devoted to the perceptions and attitudes of residents toward cruise tourism development (e.g: Brida, Riaño and Zapata, 2011; Del Chiappa and Abbate, 2012, Brida et al. 2012a, Brida et al. 2012b; Diedrich, 2010; Gatewood and Cameron, 2009; Hritz and Ceci, 2008). This is due to the fact that in tourism planning there is a need "...harmonious relationship between local communities, the private sector, and governments in developmental practices that protect natural, built, and cultural environments in a way compatible with economic growth" (Edgell, 2006: 4). Indeed, the local community is one of the principle stakeholders as it is the one most closely affected by the positive and negative impacts that tourism development can produce economically, environmentally and socio-culturally (Besculides, Lee and McCormick, 2002; Madrigal, 1995; Perdue, et al., 1990). As a consequence, residents' perceptions, their expectations and their attitude towards the impact of proposed tourism development model should be taken into account when planning the future of any tourism destination (Mowforth and Munt, 2003). Further, when studying the tourism sustainability of a destination another relevant issues emerge, that is to study how far the views of stakeholders who most influence the local tourism development converge with each other and whether they are able to keep up with those of local residents (Del Chiappa, 2012).

Specifically, recent research showed that residents' perceptions and attitude toward cruise tourism development can be differentiated based on several socio-demographic characteristics of residents such as gender, age, reliance on cruise tourism, residence-port distance, residence-tourim area distance, level of education, income and contact with cruise tourists (Del Chiappa and Abbate, 2012; Del Chiappa, Meleddu and Pulina, 2012; Brida et al. 2012a, 2012b). For example, Del Chiappa and Abbate (2012) showed that in Messina (Sicily Island in Italy) further developments of cruise tourism market appeared to be most wanted by residents whose income depends on the cruise sector, middle-aged people, highly educated, living close to the tourism area, residing in the city for less than 5 years and interacting intensively with tourists. Del Chiappa, Meleddu and Pulina (2012) found similar results in their study on residents' perceptions and attitude toward cruise tourism development in the city of Olbia, a port of call in the North-East of Sardinia island (Italy). In another comparative study Brida et al. (2012b) showed that residents' perception and attitude toward cruise activity in Messina and Olbia is quite similar despite these two tourism destinations are in a different stage of the life cycle of their cruise tourism development.

In their study on Key West, Hritz and Cecil (2008) found residents fearing that cruise tourism may threaten the laid-back atmosphere of their location and asking for greater involvement in tourism planning. Diedrich (2010) carried out research in two communities in Belize and reported residents preferring to attract stay-over tourists over cruisers. Other research found the most part of local community preferring the development of historic/cultural tourism while few people would wish to experience a growth in cruise tourism in their destination (Gatewood and Cameron, 2009). Similarly, Del Chiappa and Abbate (2012) in their study in Messina, showed that the local community would rather see the development of historic/cultural tourism, followed by sea, sun and sand tourism, cruise tourism and sport tourism. Brida, Riaño and Zapata (2011) carried a cluster to analyze residents' attitude towards the cruise tourism development in Cartagena de Indias. They considered just economic and socio-cultural impacts. Overall the study revealed a positive recognition of the economic impacts. The same was also for social-cultural impacts, even if to a lower degree. In particular they found four different clusters which they labelled as "opponents", "neutrals", "developers" and "tourism workers". The opponents were found to be mainly women, older age residents, with a bachelor or master degree, living not far from the area visited by cruise passengers and not having a job related to the tourism industry. The majority of neutrals are males, less than 45 years and not having a job related to cruise sector. The majority of supporters do not work in a cruise-related sector and are in the lowest income bracket. Finally, the majority of "tourism workers" work in a related sector and interact frequently with cruise passengers.

2.2. Valencia as a cruise destination within European ports: present situation and further perspectives

Europe is the fastest growing market for cruise ships, since more than three-quarters of Europeans choose to cruise within Europe: 61% in the Mediterranean or Atlantic Islands, 16% in Northern Europe in 2010 (European Cruise Council, 2012a). The Spanish cruise market has had a strong growth for the past ten years. Spain was in fourth position since the number of Spanish cruise passengers has raised up to 703,000 in 2011 (Table 1).

Table 1 - European cruise market by country, 2004-2011

Passengers (000s)	2004	2005	2006	2007	2008	2009	2010	2011	ƛ %
UK	1.029	1.071	1.204	1.335	1.477	1.533	1.622	1.700	5
Germany	583	639	705	763	907	1027	1219	1388	14
Italy	400	514	517	640	682	799	889	923	4
Spain	**300**	**379**	**391**	**518**	**497**	**587**	**645**	**703**	**9**
France	222	233	242	280	310	347	387	441	14
Scandinavia (inc Finland)	56	42	62	94	123	173	283	306	8
Benelux	41	42	64	82	92	110	126	159	26
Switzerland	50	51	56	64	65	76	91	121	33
Austria	38	39	44	52	59	80	93	104	12
Other*	115	117	123	175	211	213	212	224	6
Total	2.835	3.126	3.409	4.004	4.422	4.944	5.567	6.068	9

Source: European Cruise Council (2011)

The leading cruises regions within Spain are Barcelona, Islas Canarias and Baleares, Málaga, Valencia and Vigo. Barcelona takes over as the number one cruise destination. Those ports located on the shores of the Mediterranean received around 70% coming to Spain. As Table 2 shows, Barcelona remains the busiest port in Spain with 2.6 million of passengers, followed by The Balearic Islands with 1,6 million.

Table 2 - Spanish Ports ranking by number of passengers in 2011

Port Authorities	Cruise Passengers	Port Authorities	Cruise Passengers
Barcelona	2.642.493	Sevilla	16.058
Baleares	1.614.499	Santander	14.207
S.C .Tenerife	828.590	Ferrol	9.423
Las Palmas	760.896	Motril	8.998
Málaga	638.845	Gijón	7.297
Valencia	378.463	Ceuta	4.841
Bahía de Cadiz	374.217	Vilagarcia de Arousa	3.126
Vigo	253.637	Melilla	844
A Coruña	128.563	Tarragona	752
Alicante	108.435	Huelva	650
Cartagena	88.081	Castellón	586
Bilbao	77.345		
Almeria	37.047	**TOTAL**	**7.997.893**

Source: Puertos del Estado - http://www.puertos.es/estadisticas/estadistica_mensual/index.html

It is noteworthy Valencia´s progress, with an increase of close of 50% to 378.463 passengers makes it a leading destination with very positive prospects for the next few years. In fact, at the turn of XX century, Valencia´s Port was practically commercial and it was not considered yet within the Mediterranean cruise competitive market. However, thanks to the effort made by the city council, Valencia Port Authority and Tourism Valencia Convention Bureau, it has been developed a new tourism sub-product for the city of Valencia (Turismo Valencia. 2010; 2011). As a result, more and more cruise shipping companies are getting interested in including Valencia in their packages.

Cruise companies are looking for new destination to be offered, and Valencia is in the front sight for many of them, this fact is being reflected in the calls and cruise passenger figures, as can be shown in Tables 3 and 4. After 9% in calls in 2010 a further rise of 30% to 203 calls which means an increase of 153% in the last six years.

Table 3 - Valencia cruise calls: an evolution

Year	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**
Cruise Calls	80	155	164	143	156	203

Source: Own elaboration out of **Port** Authority and Valencia Tourism web pages (http://www.valenciaport.com)

As Table 3 shows, back in 2006, only 80 cruise calls were recorded in Valencia's port, increasing gradually up to 156 cruise calls in 2010, and 203 in 2011. This increase in cruise traffic is due to new international cruise ships had chosen Valencia as a home port, these are: Costa Cruceros, Iberocruceros and Royal Caribbean, apart from those companies, MSC and Happy cruises that have been in Valencia for a few years. It is also noteworthy that in 2012 Pullmantur will begin to operate from Valencia as a home port (Turismo Valencia, 2011). As regards traffic data of 2011, there is an increase of 33% in vessel calls and 57% in passenger numbers. At the end of 2010, there were 253,743 passengers and 378,463 in 2011. Half of these passengers embarked on cruises, which began and ended their voyages in Valencia as their homeport. (Rodriguez, 2012).

Regarding the volume of cruise passengers, the number has consequently increased during this period: in 2011 Valencia received about 378.463 cruise passengers, which increased by 57% in comparison to 2010, due to a growth in cruise line companies with bigger cruise vessels, as well as more cruise companies which are setting up their home port in Valencia (Portnewspaper, 2012). When one of this vessels calls at Valencia as a homeport, it is counted the passengers who disembark because they have ended their itinerary, but also remain registered those passengers who embark. These are the main factors which are making changes with new historic records, as shown in Table 3 and 4.

Table 4 - Valencia Cruise Passengers: an evolution

Year	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**

Cruise passengers	86.776	179.209	199.335	184.909	253.743	378.463

Source: Own elaboration out of Port Authority and Valencia Tourism web pages (http://www.valenciaport.com)

As Table 4 indicates, Valencia is experiencing a buoyant demand leading to profits for the cruise lines. Whereas the ship-owners are giving support and encouragement to Valencia, they are generating new job and business opportunities for the city. However, Valencia Port have a role to play in this growing hospitality industry, both sides are in pursuit of passenger´s satisfaction, thus according to their opinions the cruise ship companies will decide either disembark or not disembark their passenger the following year in Valencia. It is true that Valencia has witnessed a substantial tourism growth in the last decade due to the organization of latest special events, such as America´s Cup and the Formula 1 World Championship.

Table 5 - Most relevant actions in the Valencia's cruise market industry (1998-2012)

Year	**A shared vision at the destination to promote the cruise tourism: ACTIONS**
1998	Valencia Port Authority (VPA) became member of Medcruise **(Association of Mediterranean Cruise Ports, which helps to promote the cruise industry along the Mediterranean Sea as well as controlling the congestion and the infrastructures at ports.**
1998	Cooperation and collaboration agreement between VPA and **CACSA (The City of Arts and Sciences administrative company) with TVCB and Valencia Catering association in order to promote Valencia and its tourist attractions as a cruise destination**
Since 1999	VPA and TVCB began their presence in cruise fair trade.
2002	-City Twinning programme by Miami- Dade Port and VPA. -Sea Trade Miami (March 2002) and Sea Trade Génova (September 2002) **coordinated by VPA with TVCB.**
2002	ACCIONA TRASMEDITERRANEA the unique and new passenger's terminal.
2007	Consortium Valencia 2007**, was created since Valencia was selected as the host city of the 32nd America´s Cup, was a General State Administration, the regional and the city of Valencia) which assumed the main task of reshaping the inner basin of the port of Valencia to make it the best scenario for the sailing event.** - Marina Real Juan Carlos I - America´s Cup sailing Championship
2008	Formula 1 World Championship
2009	Meeting of Medcruise members firstly in Cartagena and secondly in Monaco
2010	-VPA took part in CTUR "city you are" **to promote the city center to cruise passengers** - European project: Seatoland - Seatrade Cruise Shipping Convention 2010 in Cannes. - Formula 1 World Championship - Valencia Cruise Forum
2011	- Actions plan 2011 by TVCB - Formula 1 World Championship - Three more cruise vessels **bet for Valencia as a Home Port** - Updating of the APV's Strategic Plan**, as the targets set out in the 2001-2015** - The 2020 updated plan **aims to prepare for the new economic challenges of the future, as the Strategic Plan have been already reached** - MSC decided to locate its headquarters in Valencia, **means the continuation and consolidation of the partnership between MSC and the Port of Valencia.**
2012	-Seatrade Cruise Shipping Convention 2012 in Miami **(APV and TVCB)** - New Valencia Passenger Services Terminal (VPS) **private initiative to cruise services. This a temporal terminal while the management model of the new cruise terminal is under study.** - Northern expansion is under construction; **it will have the capacity to handle the world's largest cruise ships, which will be ready in 2013.** - Formula 1 World Championship - Pullmantour comes back to Valencia as a home Port

Besides, the city itself owns a wide range of attractions, both historical and cultural, as well as some growing modern city areas, such as The City of Arts and Sciences. Some additional external factors strengthen Valencia's position as a cruise ship destination: the equidistant situation towards other Mediterranean ports, the high speed train which connects with Madrid

since November 2011, the saturation that has reached in some European ports, with the addition of the current position of Valencia as an *avant-garde* city.
All these assets, if the cruise industry tendency keeps growing up, will likely guarantee the success of Valencia as cruise tourism destination, as long as the strategy implemented is appropriated. As aforementioned, the support of Valencia local stakeholders within the cruise market is an important point to be followed, as proposed in the present work, in an explanatory way.
As a last section of our theoretical framework, and with the aim of better understanding the idiosyncrasy of the setting chosen for our empirical work, Table 5 has been build to show, in chronological order, the most relevant actions that have been taken place since Valencia is within the cruise market industry from the respective stakeholders, including: Valencia Port Authority (APV), Tourism Valencia Convention Bureau (TVCB), government authorities and service providers.

3. Research aims and methodology

In view of the fact that Valencia is in the growth stage, the aim of this paper is to explore the potential of the Valencia´s cruise industry adopting the perspectives of two main groups of cruise industry stakeholders, that is: the cruise liners consignees and the incoming agencies on one hand, and the residents' community on the other hand. In order to achieve it, there have been defined the following research questions, corresponding to two specific aims:

1. What are the views of key informants toward the idea of Valencia being able to consolidate itself as a cruise tourism destination with a strong awareness and image both nationally and internationally?
2. How does the local community perceive the economic, environmental and socio-cultural impacts (both positive and negative) of cruise tourism and to what extent the would like to support the idea of further development within the destination?

Accordingly to these two specific aims, the first part of the study consisted in eight semi-structured questionnaires with open-ended questions targeted to service providers in the cruise tourism: targeted consignees and incoming agencies. Specifically, the questions looked for generating qualitative data about the quality of the services and facilities that is offered to the vessels that are berthing at the port of Valencia. In order to select the targets to be asked about Valencia and its potential as a Cruise destination, a primary information was gathered from two personal interviews: one with the Head of the Valencia Port Authority´s Cruise

Department and one with the person responsible for the promotion of cruising in Valencia Convention Bureau. These primary interviews provided the names and detail contacts of eight key informants within Valencia cruise industry: four cruise liners consignees and four incoming agencies that were keen to participate in our research. The participants of this convenience sample were interviewed through semi-structured questionnaires with open-ended questions (see below Tables 7 and 8 with the questions and the findings) that were sent by email as a qualitative information collection instrument (Ritchie and Lewis, 2003). This method is consistent with the exploratory nature of our first specific aim (Veal, 2006).

To cope with the second specific aim, i.e. to analyse residents' perceptions and attitude toward cruise tourism development, we referred to the research carried out by Del Chiappa and Abbate (2012) and Brida et al. (2012a, 2012b). Specifically, the questionnaire was divided into three sections. The first section focused on socio-demographic information, the second section listed 26 items related to residents' perceptions towards the economic, environmental and socio-cultural impact generated by the cruise tourism development. A 5-point Likert scale (1 = completely disagree; 5 = completely agree) was used to evaluate residents' responses. Finally, the third part asked respondents to express to what extent they agree or disagree with a list of four statements specifically chosen to investigate their attitude towards further cruise tourism development. Again, a 5-point Likert scale was used (1 = completely agree; 5 = completely disagree) to indicate their answers. The third part also asked respondents to what extent they would support different types of tourism (cruise tourism, sport tourism, cultural tourism and sea, sun and sand tourism) by using a 5-point Likert (1 = not at all, 5 = very much). Data were collected through face-to-face interviews conducted by one trained interviewer directly supervised by the authors. Only individuals older than 16 years old were allowed to take part in the survey. A total of 126 complete questionnaires were obtained from residents living at different distance from the port and in different parts of the city

4. Findings

The research results were grouped into two sections with the aim of analyzing Valencia as a cruise destination: the key-informants' perception of cruise tourism impacts and their attitude toward a further development of cruise sector and, secondly, some preliminary results of the exploratory and quantitative research on residents' perceptions and attitude toward cruise tourism development.

4.1. The attitude of key stakeholders and operators toward cruise tourism development

As aforementioned, those informants that subsequently were interviewed by e-mail were 8 stakeholders (four consignees and four incoming agencies). They were asked about their views on the current port and city strengths and weaknesses. Nobody knows better the needs of passengers than the supply side of the vessels themselves, so their opinion on issues and challenges that Valencia´s cruise industry faces was interesting for the present study. These experts' insights and information gathered has been organized in the following tables (Tables 6, 7, 8), where the exact answers are reported. In the first question, respondents were asked to rank in order of importance from 1 to 4 (where 1=more important, 4=less important) four different actions that could be adopted to improve Valencia as a cruise tourism destination. Specifically, the statements were as follow: a) "To improve berths, docks, infrastructures for large cruise vessels and the cruise passenger terminal", b) "To turn the look of the port, cruise passengers docks and the interface port – city into a properly-equipped", c) "To extend the parking areas for buses, cars, private cars and taxis, at the port and in the city as well", d) "To improve the adaptability and the connection from the port towards the city center". Table 6 shows, the results of this first question. Specifically, it reports the four consignees expressing a rather general agreement on the need for an improvement in infrastructure as well as in the physical appearance of the port. The shift from a commercial port to a leisure cruise port is still an urgent issue to cover. Connection with the city and parking places remain areas of minor importance for the interviewees. The opinion of the agencies is different. Specifically, they were reported assessing accessibility and connections with the city as being the most important priority to improve the attractiveness of Valencia as a cruise tourism destination, followed by the other actions considered in the study.

Table 6 - Ranked opinions on needed improvements for Valencia's Port

	Consignees		
B.C TOURS, S.L	**Transcoma**	**Roca Monzó**	**C MA CGM IBERICA, S.A.**
1. a.	1. a.	1. a.	1. a.
2. b.	2. b.	2. b.	2. b.
3. c.	3. d.	3. c.	3. c.
4.d.	4.c.	4.d.	4.d.
	Incoming agencies		
Turiart	**Valencia Guias**	**Ambia Tours**	**Tourist partners**
1. d.	1. d	1.d	1. d
2. c.	2. b	2.b	2. a
3. .b	3. .a	3. .a	3. .c
4..a	4..c	4..c	4..b

After the first question, 10 open-ended questions were asked to the four consignees and 12 to the incoming agencies.

The contend of the questions were mainly the same for the two targets as the aim of gathering information on Valencia's potential for cruise development was common to both. Nevertheless some subtleties in the questions were introduced, as reported in Table 7 e 8, where all the verbal findings are registered, for each of the four consignees and each of the four incoming agencies.

Table 7 – Liner Consignees' views

1. **In your opinion, which are the main cruise conditions to berth a vessel? Valencia´s Port has not handle with them yet or which those should be improved?**

B.C TOURS, S.L	For transit ports must be offered tourist activities and attractions based on the needs and expectations of customers, whereas as a home ports must have better logistic connection by train, plane and road.
Transcoma	Pay attention to detail from a passenger and a pedestrian perspective, between the port and the city.
Roca Monzó	Valencia needs new docks and a passenger terminal, and I hope Valencia´s northern extension open in 2013 as it is supposed.
C MA CGM IBERICA, S.A.	Shuttles from the terminal to those points where cruise tourist normally visit. Nowadays, it is shameful seeing the cruise passengers carrying with their bags 800 meters from the terminal to the point where they can get a transport to go to the city.

2. **In your opinion, is Valencia properly-equipped to receive more cruise calls?**

B.C TOURS, S.L	Not yet, there are not enough passenger terminals and the one there is now is quite small to handle the demand.
Transcoma	Yes, but at this point in time, we are doing that with some difficulties.
Roca Monzó	Yes, however while the northern extension is under construction, our challenge is offer to passengers and shipping companies all the necessary services so that the embarkation and disembarkation of passengers in the port of Valencia is carried out in an effective and comfortable way.
C MA CGM IBERICA, S.A.	No

3. **Does the port of Valencia have a proper passenger terminal to handle the current demand?**

B.C TOURS, S.L	No
Transcoma	Yes, but the volume of passengers is turning up, so the unique terminal is not going to be enough big.
Roca Monzó	No, as the current terminal is small and insufficient.
C MA CGM IBERICA, S.A.	No

4. **Which sort of public transport service should be incorporate in order to improve the connection with the main tourist points of the city?**

B.C TOURS, S.L	n.a
Transcoma	Shuttles free, normally cruise liners pay them, but it would be interesting to provide this service for free, above all in high season.
Roca Monzó	Currently, a cruise vessel is provided with the number of busses that have been required in advance. However, there should be a more public transport services for those tourist that visit the city on their own.
C MA CGM IBERICA, S.A.	Shuttles which at least will guide the tourist to get outside the port and to the main areas of the city. Normally, passengers have to take a taxi because they cannot reach all touristic points with the current public transport services close to the port

5. **Which are those requirements that cruise tourists normally call for an excursion and Valencia has not got them yet?**

B.C TOURS, S.L	In general, the city is well equipped of tourist interest, although it should be increased the number of official tourist guides.
Transcoma	I think that Valencia has got attractive tourist resources.
Roca Monzó	Cruise passengers demand to be treated very well, don't be deceived with prices and claim a theft security.
C MA CGM IBERICA, S.A.	Logistic connection from port to the destination of the excursion and vice versa and wider metro service.

6. **What should be improved in Valencia to meet the needs of the one day cruise visitor?**

B.C TOURS, S.L	Valencia should keep making a commitment to cruise ships.
Transcoma	A place where passengers can have a rest and logistic areas for passengers who embark from Valencia.
Roca Monzó	There should be continuous campaigns from the chamber of commerce, city council, Valencia tourism to make storekeepers and taxi drivers aware of the manners that cruise passengers are looking forward to receive from them.
C MA CGM IBERICA, S.A.	Some old neighborhoods close to the harbor are inadequate for tourists

7. **Do you think Valencia will be able to become marquee port?**

B.C TOURS, S.L	If Valencia wants to achieve that, must be improved the port-city relationship involving much more the society.
Transcoma	I think that Valencia hold enough tourist attractions to consolidate as a *marquee port.*
Roca Monzó	Yes
C MA CGM IBERICA, S.A.	It is going to be difficult as there are other cities better than Valencia in terms of infrastructures, for instance Barcelona.

8. **According to your experience, which national or international port should be taken as a model to improve services and infrastructures at the port of Valencia?**

B.C TOURS, S.L	Barcelona – Fort Lauderdale – Venezia, because their continuous development and adaptation to the present.
Transcoma	Barcelona
Roca Monzó	All ports are different between them, Valencia just need more infrastructures.
C MA CGM IBERICA, S.A.	Barcelona due to all port infrastructures and services for the tourist. In Valencia, there should have been more investments at the port instead of encouraging initiatives such as: the Formula 1 World Championship or America´s cup sailing competition.

9. **Which are the advantages of Valencia in comparison to other cruise ports-destinations that enhance the city to consolidate as a cruise tourism destination?**

B.C TOURS, S.L.	Valencia is well connected with Madrid and Barcelona, although should be increased the number of international flight connections.
Transcoma	Most of the tourist attractions are having positive repercussions after the Formula 1 World Championship or America´s cup sailing competition
Roca Monzó	People like Valencia because there an old and modern area within the city which can be visited because its exceptional climate, in addition the speed train which connects with Madrid will attract more passengers.
C MA CGM IBERICA, S.A.	The modern and old part of the city make an attractive overview

10. **Finally, what would you advise to the city of Valencia to consolidate as a cruise tourism destination?**

B.C TOURS, S.L.	Bench marketing with those ports that have already achieved their consolidation.
Transcoma	Valencia port Authority with all government authorities have to make every effort to consolidate Valencia as a cruise tourism destination, as far as I know Valencia's Northern Expansion will be finished in 2013.
Roca Monzó	Shopkeepers and taxi drivers should treat cruise tourist much better. Valencia Port and Tourism Valencia convention bureau should establish the best relationship between them above all in busy season.
C MA CGM IBERICA, S.A.	Neighborhood like Cabañal, near by the harbor should be cleaned up, because if a tourist visits this area it would not bring nice impression of the city.

Table 8 - Incoming agencies interviews responses

1. **In your opinion, is Valencia properly-equipped to receive more cruise calls?**

Turiart	Not yet, although there is a plan for the improvement of the existing infrastructure.

Valencia Guías	Not yet, as there is a lack in several aspects.
Ambia Tours	No, it is not enough
Tourist partners	No

2. **Does the port of Valencia have a proper passenger terminal to handle the current demand?**

Turiart	No yet, although there is a plan for a new terminal coming shortly
Valencia Guías	It does not have and the current terminal is tiny for the demand
Ambia Tours	It is not enough, small and without parking and signaling is not good.
Tourist partners	The unique terminal is not enough to host the large vessels

3. **Which sort of public transport service should be incorporate in order to improve the connection with the main tourist points of the city?**

Turiart	The best option would be metro, but neither proper buses services nor tram do exist.
Valencia Guías	Metro and more buses lines should go to the port.
Ambia Tours	Metro
Tourist partners	Metro, more taxis and public bus services

4. **What are the tourist tours that you most offer for cruise passengers in Valencia?**

Turiart	City center, Lladró Museum and Albufera Natural Park
Valencia Guías	City center, Lladró Museum and Albufera Natural Park
Ambia Tours	Valencia City center and its surroundings.
Tourist partners	City center, The City of Arts and Sciences and Albufera natural park

5. **Which are those deficiencies in the city of Valencia that are hindering to provide better services?**

Turiart	There is a lack of coordination between port, consignees and other cruise stakeholders.
Valencia Guías	There is a shortage of official guides and staff should have a second language
Ambia Tours	Coordination between tourism Valencia , APV and excursion agencies
Tourist partners	Staff do not speak a second language in an 80% of cases

6. **According to your opinion, what is the general cruise passenger's satisfaction, once they finish their city tour? Please answer selecting a number from 1 to 5 (1=Not satisfied at all, 5=very satisfied)**

   All respondents were reported ranking 4

7. **Please, write down either a positive or negative comment from the cruise passengers about the city or port, which has brought your attention.**

Turiart	Positive: the size and variety of touristic spaces Negative: meet and greet spaces at the port are small when a big group of passengers disembark; also toilets and parking area are not enough.
Valencia Guías	Positive: There is a wide range of tourist offers and the Valencia´s climate is extremely mild and pleasant Negative: lack in the logistic connection between the port and the airport
Ambia Tours	Positive: Valencia is a city which surprise because of its charming and beauty. Negative: Inefficient access at the port as well as shops timetable not adapted to the cruise tourism
Tourist partners	Positive: Attractive tourism resources those were unknown. Negative: Museums and shop timetables not adapted.

8. **Which are those requirements that cruise tourists normally call for an excursion and Valencia has not got them yet?**

Turiart	Cruise liners do not allow offering a customized package to the passengers.
Valencia Guías	More information to visit the city in their own.
Ambia Tours	More adapted timetables and better infrastructures, most of the staff should speak a second language, better signing within the city center.
Tourist partners	Sometimes the shops remain closed while tourists visit the city and most of them just speak their mother tongue.

9. **Do you think Valencia will be able to become marquee port?**

Turiart	Yes, but there are still gaps to be fulfilled in terms of accessibility, variety and quality of services.
Valencia Guías	Yes, it could be possible improving the coordination between the supply side
Ambia Tours	Yes it could be possible
Tourist partners	Yes, as up to date Valencia has got most of the characteristics to become marquee port

10. **Which are the advantages of Valencia in comparison to other cruise ports-destinations that enhance the city to consolidate as a cruise tourism destination?**

Turiart	The good weather, the size of the city, the wide range of tourist attractions and the speed train between Valencia and Madrid.
Valencia Guías	Speed train Madrid -Valencia, the climate, the gastronomy.
Ambia Tours	Climate, gastronomy, touristic resources and Mediterranean atmosphere.
Tourist partners	Speed train Madrid-Valencia, climate, sagely combining its heritage with modernity.

11. **Finally, what would you advise to the city of Valencia to consolidate as a cruise tourism destination?**

Turiart	Tourist and cruise companies and official institutions must maintain cooperation relationship with transparency
Valencia Guías	First of all, must be improved the infrastructures, thus is the first impression of the city
Ambia Tours	There must be an improvement in those deficiencies that Valencia has, further there is a need to develop a strategy leaded by professionals
Tourist partners	Better relationship between public and private institutions

4.2 Residents' perceptions and attitude toward cruise tourism development: exploratory quantitative research

Table 9 presents the general profile of the sample population. The sampling procedure is not random, in accordance with the exploratory nature of the study. Consequently the sample might be slightly biased in gender, age and education. The majority of residents were female (65.3%), whereas males accounted for 34.72% of respondents. Most respondents reported not to be economically dependent on cruise tourism (90%). Most respondents reported having a bachelor's degree (53.2%) whereas 29% had a postgraduate degree or master.

Table 9 - Socio-demographic characteristics of the sample (%) – N= 126

Gender		Other	4.9
Male	34.7	**Distance from home to tourist area**	
Female	65.3	Less than two	33.6
Age		Between 3 and 5	28.6
Young (18-35)	46.7	Between 6 and 10	20.2
Middle aged (36-55)	46.9	Between 11 and 20	11.8
Senior (more than 55)	6.4	More than 21	5.9
Education		**Distance from home to port of Valencia**	
Below high school	11.3	Less than two	11.7
High school	6.5	Between 3 and 5	45.8
Bachelor's degree	53.2	Between 6 and 10	19.2
Post degree/Master	29	Between 11 and 20	13.3
Number of members in household		More than 21	10
Two or less	27.6	**Does your income relate to the cruise tourism?**	
Three and four members	49.1	Yes	10
Five or more	23.3	No	90
Occupation		**Years of residence in Valencia**	
Administrative worker	51.2	Less than five	9.5
Executive manager	5.7	Between 6 and 10 years	5.6
Freelance	17.1	Between 11 and 20 years	11.1
Retired	2.4	Between 21 and 30 years	26.2
Unemployed	8.9	More than 31 years	47.6
Student	9.8		

Types of respondents' occupation were: administrative worker (51.2%), executive manager (5.7%), free-lance (17.1%), retired (2.4%), unemployed (8.9%), students (9.8%) and other jobs (4.9%). The majority of residents belonged to the 36-55 age group (46.9%) and reported living in household of three or four members (49.1%). Most residents reported a length of residency above 31 years (47.6%) and living less than 2 km away from the main tourist area (33.6%) and between 3-5 away from the port (45.8%).

Table 10 – Mean scores and % for the questionnaire items

Items: cruise tourism…	Residents' perceptions (N = 126)						
	1	2	3	4	5	Mean	S. D.
Positive economic impacts							
Increases public investments and infrastructures	-	12.4	20.4	33.6	33.6	3.88	1.016
Increases private investments and infrastructures	-	8.8	20.2	41.2	29.8	3.92	.923
Increases job opportunities	-	4.4	15.8	35.1	44.7	4.20	.864
Increases the income of local people	1.8	7.9	11.4	46.5	32.5	4.00	.959
Positive socio-cultural impacts							
Enhances the quality of life	5.3	15.9	38.9	28.3	11.5	3.25	1.031
Allows to meet new people and to experience new culture	4.4	17.5	21.9	33.3	22.8	3.53	1.154
Enhances the local offer of cultural entertainment activities	4.4	10.6	27.4	42.5	15	3.53	1.018
Makes the best of this location's identity and authenticity	4.4	10.5	18.4	47.4	19.3	3.67	1.045
Enhances the quality of restaurants, hotels and retail facilities	5.3	11.4	22.8	37.7	22.8	3.61	1.117
Improves the safety and security of the city	4.4	20.2	36.8	28.1	10.5	3.20	1.023
Enhances social and cultural life for local people	8.8	15.9	30.1	36.3	8.8	3.25	1.031
Positive environmental impacts							
Incentivizes the preservation of the environment	12.3	27.2	32.5	21.1	7	2.83	1.112
Incentivizes better infrastructures	6.1	16.7	21.1	43	13.2	3.40	1.103
Enhance the quality of public services	7	17.5	27,2	36.8	11.4	3.28	1.101
Allows to preserve and to exploit the local cultural heritage	4.4	7	29.8	47.4	11.4	3.54	.942
Enhances the physical and socio-cultural settings	8	8.8	32.7	38.9	11.5	3.37	1.062
Negative economics impacts							
Increases the cost of living	10.7	21.4	26.8	33	8	3.06	1.141
Produces benefits that mostly go to external business investors	5.3	16.8	34.5	31	12.4	3.28	1.056
Subtracts financial resources from other projects	12.4	26.5	32.7	23	5.3	2.82	1.088
Negative socio-cultural impacts							
Increases car-traffic	25.4	33.3	28.9	9.6	2.6	2.31	1.040
Increase the number of minor crimes	27.2	36	25.4	8.8	2.6	2.24	1.033
Forces me to change the way I manage my daily life	52.2	23	15.9	3.5	5.3	1.87	1.138
Negative environmental impacts							
Alters the ecosystem	19.3	19.3	31.6	24.6	5.3	2.77	1.175
Increases air and marine pollution	15	16.8	32.7	31.9	3.5	2.92	1.111
Makes local entertainment facilities/public area overcrowded	10.6	15	28.3	35.4	10.6	3.20	1.151
Produces significant levels of waste/garbage	16.8	19.5	28.3	30.1	5.3	2.88	1.174
Overall it brought more benefits than costs	1.8	7.1	13.3	41.6	36.3	4.04	.972

For coping with our aim of exploring and contrasting stakeholders perceptions and attitudes towards cruise tourism development, the qualitative study has a descriptive nature, proposing one-dimensional measures for each question. Table 10 shows that respondents think that, on the whole, cruise tourism is bringing more benefits than costs (M=4.04, SD=.972). Further, results show that respondents expressed low concern or "neutral" responses ($M \leq 3$) toward all but three statements used to asses their perceptions about the negative impacts rising from the cruise tourism development. In particular, they appeared to be concerned by the idea that most of the benefits of cruise tourism go in the hands of external business investors (M=3.28, SD=1.056), that cruise tourism makes local entertainment facilities/public area overcrowded (M=3.20, SD=1.151) and, even if slightly, that cruise development increases the cost of living (M=3.06, SD=1.141).

At the same time, respondents displayed positive attitudes toward some of the economic, socio-cultural and environmental impacts of cruise tourism. The benefits of cruise tourism in terms of improvement in private investments and infrastructure (M=3.92, SD=.923), job creation (M=4.20, SD=.864), improved quality of restaurants, hotels and retail facilities (M=3.61, SD=1.117), increasing the opportunities of cultural exchange (M=3.53, SD=1.154), exploitation of local identity/authenticity (M=3.67, SD=1.065) and cultural heritage (M= .54, SD=.942) were highly ranked by the respondents.

Respondents were also asked whether they would support additional cruise tourism development (Table 11). They reported a positive attitude about this possibility showing a low level of agreement with the statement "The number of cruise ships that arrive in our city should be limited/stopped (M=2.09, SD=0.969).

In particular, they think that local institutions should incentivize this kind of tourism through subsidies, tax cuts (M=3.57, SD=1.231), revitalizing the area inside the center (M=4.05, SD=.843).

Table 11 – Mean scores and % for the residents' support toward cruise tourism development items

Type of tourism	Residents' attitude toward cruise tourism (N = 126) 1	2	3	4	5	Mean	S. D.
The number of cruise ships that arrive in our city should be limited/stopped	33.6	31.9	27.4	6.2	0.9	2.09	.969
The revitalization of retail facilities in the city center would be useful to attract more cruise tourism	-	6.2	14.2	47.8	31.9	4.05	.843
Local institutions should attract (trough subsidies, tax cuts, etc) cruise ships	7.1	15.9	15.9	35.4	25.7	3.57	1.231

However, when they were asked to asses to what extent they would support four different types of tourism, cruise tourism was not the favorite (Table 12).

Table 12 – Mean scores and % for the residents' preferences of different type of tourism

Type of tourism	Residents' preferences for four type of tourism (N = 126)						
	1	**2**	**3**	**4**	**5**	**Mean**	**S. D.**
Cruise tourism	3.5	12.4	19.5	31	33.6	3.79	1.145
Sport tourism	3.5	8.8	25.7	38.1	23.9	3.70	1.043
Sun and sea tourism	6.3	8.9	29.5	27.7	27.7	3.62	1.164
Cultural tourism	1.8	1.8	8	31.3	57.1	4.40	.854

In particular, results showed that the local community would rather see the development of historic/cultural tourism (M=4.40, SD=.854) followed by cruise tourism (M=3.79, SD=1.145), sport tourism (M=3.70, SD=1.043) and sun and sea tourism (M=3.62, SD=1.164). This seems to confirm prior pioneer research aimed at analyzing residents' perceptions and attitude toward the development of cruise tourism (Gatewood and Cameron, 2009; Del Chiappa and Abbate, 2012).

5. Discussion and conclusions

With the aim of exploring the potential of Valencia as a sustainable cruise tourism destination, this paper studied the opinion of different stakeholders of the cruise industry and local community by means of a mixed method which combined both qualitative and quantitative study.

The qualitative approach consisted in semi-structured questionnaires with open-ended questions sent to eight key stakeholders (consignees and incoming agencies) in order to find out their views and to collect information about the current port and city weakness. The quantitative approach focused on an exploratory survey on 126 residents and was aimed at investigating their perceptions and attitude toward cruise tourism development in Valencia. The adoption of such a mixed method allowed us to obtain an overview of the current situation in the city as regard to its attractiveness for tourism as a whole and for cruise activities in particular.

It is universally acknowledged that evaluating perceptions of residents – as key local stakeholders – is a key step before investing in any given type of tourism (Vernon, Essex, Pinder, and Curry, 2005). A planning process that is sensitive to community's needs and attitudes toward tourism development is understood as one of the integral components of sustainability (Fredline and Faulkner 2000).

Although the impact of tourism has deeply interested researchers attempting to investigate the attitudes of the host population toward tourism development (e.g. Mowforth and Munt, 2003; King, Pizam, & Milman, 1993), research on perceptions and attitude of local community (residents and tourism businesses) towards cruise tourism development is still rather scarce. The general topic has been researched considering different segments of tourism development, rather than tourism as a generic activity (e.g. Fredline and Faulkner, 2000). In that sense, research shows that residents, who may negatively regard a type of tourism, may be more favorable, however, towards another type of tourism development (King, Pizam and Milman, 1993; Pulina, Meleddu and Del Chiappa, 2012). Extra research on particularities of cruise tourism development and sustainability remains a potential area of knowledge.

Ensuring the sustainable development of tourism destination is very difficult and requires collaborative policymaking between local authorities, government agencies, businesses and host communities, who must work all together to plan and regulate tourism development projects (Vernon, Essex, Pinder and Curry 2005). Further, when studying the tourism sustainability of a destination is pivotal to study how far the views of stakeholders who most influence the local tourism development converge with each other and whether they are able to keep up with those of local residents. This occurs also when cruise tourism destinations are specifically considered. In fact, in spite of a certain lack of interest from researchers, we believe cruise tourism can involve host communities in a sharper way that some other sort of tourism (as adventure tourism or sport resort tourism, among others), as interactions between cruise tourists and residents are very intensive, both in time and space. All that said, it is reasonable to think of the existence of a close relation between sustainable tourism destination and sustainable cruise tourism destination, where further knowledge is expected to come.

Given this importance of resident's input in tourism development (Gursoy and Rutherford, 2004), our findings can usefully contribute to the academic debate on community-based tourism in cruise tourism destinations, where no published paper do exist in our best knowledge on home-port, and can also support policy makers' in their effort towards a more sustainable model for cruise tourism destinations.

On the whole both key informants and local community has a positive attitude toward the cruise tourism development within the destination, even if some actions are asked to be done to achieve these aims.

On the one hand, key stakeholders believe that Valencia holds an attractive tourist offer for the current and future demand (Madrid-Valencia speed train, Mediterranean climate, popular gastronomy, plain city which allows cycling, tourist resources with recognition, etc). Furthermore, most of them have considered that Valencia could possibly consolidate as a marquee port in the next future, as long as port infrastructures for mega ships are improved (berths and passenger terminal) as well as the surrounding of the port get restored (Cabañal and Nazaret neighborhoods). As a matter of fact, consignees and agencies agreed that there is a lack of public transport services between the port and the city, though agencies give more priority to the improvement of transport than consignees since they believe that the outlook lies in all the infrastructures improvements. As it has been mentioned above, the main requirement for Valencia port is to extend the berths as well as the passenger terminals to provide a better service to passengers shipping companies in an effective, comfortable and satisfying way. In fact, Valencia's Northern Expansion is already under construction, which will increase the port of Valencia´s land surface area. On the top of that, in 2012, the Consortium Valencia 2007 has awarded to Valencia Passenger Services the offices that requested this Temporary Union of Companies at the Maritime Station of the port of Valencia to render a better service to cruise passengers that call at the port of Valencia, while the management model of the new cruise terminal is under study. Apart from that, there are some other improvement lines within the relationship cruise passengers-city, such as: adapting the shops and museums timetables to the cruise demand as well as is required a better tourists treatment in terms of languages knowledge and kindness, as a matter of fact more synergies should be obtained between the different stakeholders.

On the other hand, residents were reported thinking that cruise tourism is bringing more benefits than costs and, accordingly to the social exchange theory (Ap, 1992), they would support additional cruise tourism development, even if findings revealed that local community would rather see the development of historic/cultural tourism (followed by cruise tourism sport tourism and sun and sea tourism). However, it should be noted that they appear to be concerned by the idea that the most of the benefits of cruise tourism go in the hands of external business. These and other issues are still a need for further development of the cruise sub-product in the Spanish tourism industry.

6. Limitations

Aside from the contribution of the study, as with all research, there are limitations pertaining to this study that should be solved in further works. Specifically, the sampling method has not been random in either the qualitative or the quantitative approach. And the results offered are merely descriptive, in coordination with the type of aim pursued (exploratory). As a consequence, the present paper has to be considered as preliminary research and a first attempt to investigate stakeholders' views and local community perspectives toward cruise tourism development

7. Future research

Aside from the limitations just discussed, the present study does highlight several possible future research paths. Further, a bigger sample of residents, randomly selected, should be reached in the future thus allowing authors to obtain more consistent and representative findings. This, would also allow us to run deeper statistical procedures (One-way ANOVA, t-test, cluster analysis, etc) in order to find out whether any significant differences in residents' perceptions and attitude towards cruise tourism do exist based upon their socio-economic and demographic characteristics. This information would be valuable for both the academia and practitioners. On the one hand, it would develop further knowledge on the area of community-base tourism in cruise tourism destination (studying, for instance tropics such as increasing competition between tourists and residents for using primary resources like water, or the precise relationship between local shoppers an tourists shoppers, etc...), where in our best knowledge no published paper do exist analysing residents' perception and attitude in a home port. On the other, it would support destination marketers and policy makers in their attempt to draw marketing and communication operations which are tailored coherently with the socio-economic and demographic characteristics of residents, to their current attitudes and corresponding latitude of acceptance, thus resulting in a higher capability to be persuasive and able to increase the favourableness of residents' attitudes toward cruise tourism development.

8. Managerial implications

After the tragic events (at Giglio island, Italy) which affected the image of the cruise sector as a whole, the world's cruise industry have moved swiftly to review and improve operational safety measures, and to reassure customers that cruising is a safe and enjoyable holiday. Although it is too soon to give industry-wide data for booking trends so far this year, the industry is well positioned to continue its growth. According to Manfredi Lefebvre d'Ovidio, Chairman of the ECC "Despite this challenging environment the cruise industry remains resilient and there are good reasons to believe that we will come through this period of uncertainty in a strong position." (European Cruse Council, 2012b). Spain cruise industry has a relevant choice to make to cope with this period of uncertainty from which the country is particularly suffering, by means of consolidating some of its cities (Valencia and others) as homeports within the growing European cruise industry.

Findings of our study give support to policy makers attempting to understand whether and how more public resources should be invested in the cruise business. Specifically, based on the key stakeholders' views, they suggest that several action should be adopted to improve the offer of Valencia as a cruise tourism destination. Among them we can cite the need for an improvement in the port infrastructures and facilities, in the public transport connection between the city and the port area as well as for an extension in berths/terminal and in the shops and museums timetables in order to make them available for passengers. As a matter of fact a stronger networking between all the public and private stakeholders within the destination is required to achieve an effective cruise tourism development. Further, findings highlight that destination marketers and policy makers would need to let residents be fully cognizant about the benefits that cruise tourism bring to the local community thus avoiding that they can continue to be concerned by the idea that the most of the benefits of cruise tourism go in the hands of external business. To achieve this aim, policy makers should target residents with communication operations delivering them information on some objective data related to the positive impacts that the development of cruise sector generate for local people (such as the number of residents who are involved in the cruise sector, the economic induced effect on residents, etc).

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