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OBSERVATORY ON TOURISM IN THE EUROPEAN ISLANDS
OBSERVATOIRE SUR LE TOURISME DANS LES ILES EUROPÉENNES

RESEARCH DEPARTMENT

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CRUISE TOURISM EFFECTS ON THE MEDITERRANEAN ISLANDS'ECONOMIES

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ABSTRACT

Precedent studies show that cruises are able to generate daily visitors distributing additional expenditure for tourist destinations, giving new possibilities to support existing and future local economic activities.
For Mediterranean islands, particularly related to this kind of tourism, the economic effects of cruise tourism seem to be different if compared with other territories, here defined as *mainland*.

The aim of this paper is to analyze the effects of cruise tourism in the Mediterranean ports of call for insular and non insular territories.

By focusing on Daily Cruise Visitors behaviour and by analyzing the passengers spending patterns in this work, we evaluated the economic effects of cruise tourism considering two categories: excursion buyers and independent passengers.

Results show that the cruise stops in the Mediterranean islands port of call are relevant in terms of passenger flows. We can argue that islands are considered attractive stops along the itineraries. We surveyed that cruise daily visitors prefer to be independent during the stop, looking for a real experience in the island, organizing the visit on their own, searching and purchasing goods and services from local suppliers. Islands, if some conditions are respected, could be able to profit from the economic impact deriving from cruise tourism.

Keywords: cruise tourism, Mediterranean islands, expenditure patterns

1. Introduction

In the last twenty years the cruise market has achieved a high and rising level of growth, compared to the other tourism segments. The increase in terms of new vessels ordered, cruise bed capacity and passenger numbers demonstrate the cruise market performance.

European markets are leading this trend with a 10% growth rate in terms of passengers, followed by US and Asian market (Papathanassis A. , Gibson P., 2009). This increasing traffic is generating demand for new ports, also providing new and more passengers for existing cruise ports, particularly in the Caribbean and Mediterranean areas.

These trends are relevant for the development strategies in the harbours and coastal cities. Cruises are able to offer increasing number of daily visitors in the costal territories, but they could also guarantee weekly or monthly stops in case of repetitive cruise itineraries.

From a customer point of view, the transportation's option typical of a cruise liner, compared to a traditional destination, offers the opportunity to visit different places along the journey simply by staying on a 'floating resort' while travelling (Gulliksen, 2008). This way the stops-over of cruise vessels represent, then, an occasion to create and characterize the cruise product offered with a wide range of different territories to visit. In cruise tourism, ports and cruise product are strictly connected.

From a destination point of view, cruises generate daily visitors in terms of excursionist flows, and could be considered a good way to support local economies. In this regard, we have to consider that daily cruise visitors are responsible for tourism expenditure, which means that the economic impact on destination is connected with their expenditure behaviour. This is also connected to the availability of local commercial activities that can support expenditure decisions, the time of the stop in the harbour, the passenger flows, and their expenditure patterns.

This way, cruises have an important role in terms of economic benefits in coastal areas, but the effects are related with some variables that should be investigated in order to gain the best advantages from this opportunity.

Cruises are able to generate for tourist destinations daily visitors distributing additional expenditure, giving new possibilities to support existing and future local economic activities.

The aim of the paper is to present the divergence of the economic effects for the islands, proposing some ways to increase the impacts on local economies.

In the first part of the paper we show the differences between DCV (Daily Cruiser Visitors) flows generated by cruises in the Mediterranean islands compared to the ones generated in the continental areas.

The results seem to show that local economies generated by DCV could give a higher level of economic impact in the Mediterranean islands if some conditions are respected.

2. The Theoretical framework

Precedent studies show the economic significance of cruise tourism (Macpherson, 2008), providing also a framework to assess the economic impact (Dwyer L., Forsyth P., 1998). Also expenditure categories were proposed in order to determine the economic impact of a cruise ship's visit (Douglas N., 2004). Further studies concentrated the attention to the port situation, and the port site to explain the success of cruise ports (McCalla, 1997). Also the attractiveness and the condition of the management of the port-territory system was considered (Errichiello L., Volpe T., 2009).

Researchers, as Dwyer and Forsyth, underline the relevance of cruise tourism economies in the small island states particularly in Caribbean and south Pacific, underline the importance to distinguish between the expenditure in a base port and in a stop-over port as small islands (Dwyer L., Forsyth P., 1998) .

From these studies, we can argue in this issue about the relevance of the shape of the territories, as the islands, in order to explain different economic effects generated by cruise visits.

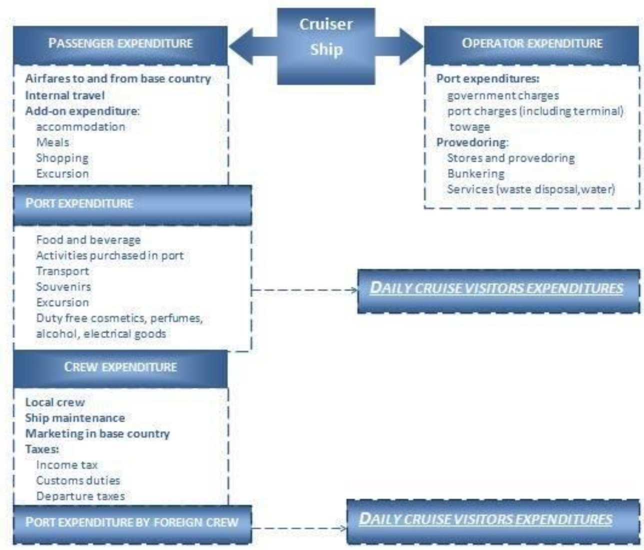
In terms of economics of cruise tourism, we are interested to differentiate cruise stops in harbours located on the mainland, the ones near big cities that are better organized, from the ones that are located on the small and medium sized islands.

For both territories, the principal variable to be observed in the port of call, is the expenditure of cruise passengers. This component is one partition of the total passenger expenditure for cruise package (Douglas N., 2004). Port expenditure is the main contribution from the cruise passengers to local businesses and services, and not tied to the pre-packaged goods and services provided and well offered on the ship directly from the cruise line.

Cruise related expenditure framework is well represented in the paper of Ngaire and Norman Douglas, including the contribution of preceding studies. **Figure 1** Propose a new classification, considering the moment of the expenditure decision.

In this case the paper focuses on the relevance of the port expenditure in each cruise stop, as a main contribution of passenger visit to the destination.

Figure 1: Cruise related expenditure framework



The expenditure behaviour of cruise passenger, indicated as Daily Cruise Visitors (CDV), considering the destination point of view, could be also influenced for the shape of the territory. We argue that a small island and a small harbour near a little town could determine a modification in expenditure behaviour and in the composition of the basket expenditure.

There are, for instance, successful ports of call on the Mediterranean islands, where harbours and towns are fully organized to manage the cruise daily visitors flows. This way the attractiveness of the local stops is high compared to the offer provided and managed from the cruise line.

This challenge is played on the field of Port or local expenditure, where the passenger chooses between the option of organizing a single visit for each destination or purchasing a pre-packed excursion or itinerary, provided by the cruise operator directly on board.

In this context, Islands could play a leading role due to their attractiveness, warm welcoming, small and secure context, offering self-made visit experience also to passengers linked to cruise packages.

3. Cruise tourism and Island's development

In European Union lives more than 14 million of people whose overall land mass is about 4% of Community surface. Regarding tourism, Mediterranean islands manage 40 million of tourist arrivals with approximate 300 million of overnights (OTIE, 2008).

Tourism represents, for small and medium size islands a single industry often tied to seasonality, with problems linked to carrying capacity, with limited connections to the other international tourism markets, and with insufficient internal financial resources to invest on tourism activities (Insuleur, 2005).

Islands territories are also affected by structural problems (transportation system, infrastructures, air connection, etc.) and handicaps due to their insularity (far from main markets and opportunities), their geographical isolation and their low population density.

Islands also have a different economic and organisational structure compared to the mainland, and it is show by the prevalence of microenterprises, especially in the services and tourism sectors, which occupy the main part of the local economies (Ruggieri, 2006).

The vulnerability of these territories (Briguglio, 1995), are even increased by the tourism industry which represents the main economy in most of the small and Medium sized islands.

Besides this consideration, tourism effects in the islands request a particular approach due to their insularity. According to researchers special economic indicators need to be considered to approach tourism analysis and politics (Briguglio e Kisanga 2004).

For island economies, tourism could represent a good chance to support the local productions and commercial activities but at the same time tourist expenditure, due to the request of tourists or due to the economic structure, often activates a high level of import flows.

In these territories positive and negative effects of tourism should be considered for each segment of tourism, proceeding with a balance able to capture both negative and positive effects.

Cruise tourism for islands could be considered a chance to receive and manage economies coming out from daily cruise visitors.

Products and services provided for Daily Cruise Visitors (DCV) should be appropriate and connected with local productions, personalized and linked to expenditure patterns (Dwyer, Forsyth, 1998).

These considerations are useful as general overviews on the islands economic organization and lead us to the need to use a different approach in the field of tourism particularly for the islands.

Moving from these considerations, the evaluation of economic impact related to cruise tourism for islands are interesting to take in consideration and will be discussed in this paper.

For Mediterranean islands, particularly related with this kind of tourism, the economic effects of cruise tourism seems to be different if compared with other territories, defined as mainland.

The benefit of cruise tourism for islands should be accurate holding in consideration the internal and external effects, the carrying capacity in terms of daily passengers, the structure of commercial activities, and the capability to amplify the multiplier effects on local business activities.

4. Methodology

The analysis of the cruise tourism in the Mediterranean basin has been developed considering the information coming from the main cruise ports, and the information on cruise passengers displayed from research centres and Cruise Companies.

The former is realized by calculating the passenger flows for each port, thanks to the database of Mediterranean Association of Mediterranean Cruise Ports. Mediterranean cruise consortium is constituted by 70 members representing 67 ports around the Mediterranean regions.

For cruise tourism, ports are important bases for embarkation and debarkation and, along the cruise route, they serve as intermediate destination for excursions and resupply (McCALLA R., 1997).

Consequently in the analysis, we considered the differentiation between (Martini, B.E.,1990); *home ports* for incoming and outgoing passengers, due to the fact that they have to start embarking and debarking procedures, and *ports of call* as part of cruise itineraries, where cruise lines stops offer visits to main sites.

Proceeding from the total passengers flows calculation, a bipartition between passengers in transit and passenger embarked and disembarked was calculated.

It's then possible to recognize two different effects of cruise tourism on the territories: the ones generated in harbours at the beginning and at the end of a cruise, from the ones addressed to the passengers in transit during the cruise stop.

Second step was to calculate the passenger flows identifying the harbours located on the islands' territories and the ones on the mainland in the Mediterranean Basin.

Considering the information collected from the database of the two major cruise lines as Costa (Carnival Group) and Msc Cruise line, the average was calculated of people that decide to buy excursions, from the ones who prefers to be independent visitors of the destination. Cruise lines provide the data regarding passenger excursions for each stops, due to their revenue on the excursions services. This is easily determined by calculating the average of passengers who stop in main ports and/or island ports to visit the location, from those who spend their time on board.

Another research step was to calculate the DCV's average pro-capita expenditure.

Considering the excursion prices offered on board by the cruise company for each stop, the average price per excursion was calculated, considering mainland excursions programmes and the ones offered in the island ports. This way excursionist pro-capita expenditure was determined.

To gather independents DCV information, data, provided by Carnival Cruise line, was utilized in accordance also to the data given from the Mediterranean Port Authorities network. Calculating the expenditure matrix, considering the two variables, independent vs excursionist and Mainland vs Islands, the effects of cruise tourism in the Mediterranean ports of call insular and non insular territories were determined.

The total amount of passenger spending is a first step to take into consideration for the economic relevance of cruise tourism in the intermediate destinations.

The study deliberately did not measure the expenditure pattern due to the difficulties to have specific data or detailed information from cruise line statistical offices.

We have also consider some factors which are influencing the expenditure pattern, as weather, profile of the passengers, nature of the ports, shopping opportunities and ship tours and activities purchased ashore (McCALLA, 1996).

5. Cruise tourism: mainland and islands

The European Cruise market is second worldwide for importance and in terms of passenger flows. The stable vessels operating in Europe are 76 with a capacity of almost 130,100 lower berths. Europe generates 3.3 million of passengers representing 23% of all cruises worldwide and 2.8 million choose European itineraries (G.P. Wild International Limited, 2007). The vast majority of these cruises visited ports in the Mediterranean, the Baltic and other European regions and generated 13.1 million passenger visits.

Looking at the Mediterranean basin over 119 cruise ships were active in 2007 with a capacity of 110,725 lower berths on 1,879 cruises.

This data shows that cruise tourism is responsible for a large number of passenger flows in terms of embarkation and disembarkation and transits.

To better analyze the role of home ports and ports of call in the Mediterranean area comparing the mainland to the islands, we must necessarily divide the data considering the number of passengers embarked and disembarked from the number of passengers in transit.

The first table shows the total passenger flows in the main ports divided in two classes: mainland and islands harbours.

Data shows that islands manage approximately 36% of the total cruise passenger flows, and most of them are concentrated in Greece followed by Italy and Spain.

This demonstrates that islands have a good share in terms of total passenger flows originated on cruise lines.

In terms of transit flows Mediterranean islands received 3,472,330 daily passengers per visit, excursion and other activities. It also appears that islands' transit flows are more consistent than embarking and disembarking flows. It therefore demonstrates the high presence of ports of call instead of home ports in the Mediterranean islands.

The mainland areas draw 64% of the total passenger flows where three countries, as Italy, Spain and Greece, manage most of it.

In terms of cruise passengers in transit, Italy attracts a relevant share of 37%, while the other Mediterranean countries have an average share approx of 10%. Also Italy and Spain are the top countries for home cruise ports considering they have transport hubs connected to the main harbour system. Similar but more appropriate results are obtained by focusing on the islands and mainland ports.

Of the 32 ports considered, 12 of them are located on the islands and we have to consider also that ports handle an average of 500.000 total passenger flows per year. While islands ports manage a higher number of passengers in transit per year, other ports on the mainland are specialized for embarking and disembarking. It means that the Islands seem to be more apt to handle daily visitor flows instead of being terminal points for the cruise lines, due also to their characteristics and the level of airport connections and infrastructural systems owned by the big ports in the mainland. For these territories the *top destinations* in the Mediterranean area are: Barcelona, Civitavecchia, Venice, Naples and Piraeus.

Considering single areas instead of the countries, taking into account, for example, Palermo's and Messina's harbours have a market share of 29.6% followed by Palma de Mallorca's with 15.2% of the total cruise flows on the islands. Other islands hold a lower percentage of passenger flows. This explains the relation between the cruise passenger flows and the geographical positions and dimensions of the islands.

Finally, comparing the total daily visitor flows arriving to the islands, we can observe that the distribution is quite homogeneous. This way we can argue that that cruise flows in the port are independent from the shape of the island.

In terms of economic impact produced by the daily cruise passenger expenditure, Islands could reach a different advantage considering the size of the island and the structure of local productions and services supply.

Table 1: Cruise passenger flows generated by cruise companies in the Mediterranean lands and islands

Countries	Total passengers flows	Share (%)	Passengers in transit	Share (%)	Embarking and disembarking flows	Share (%)
Italy	4,249,144	42.7%	2,200,033	37.2%	2,049,111	50.8%
France	829,315	8.3%	764,556	12.9%	64,759	1.6%
Greece	1,031,834	10.4%	613,706	10.4%	418,128	10.4%
Spain	1,252,372	12.6%	548,522	9.3%	703,850	17.5%
Turkey	609,131	6.1%	516,605	8.7%	92,526	2.3%
Tunisia	485,245	4.9%	485,245	8.2%	-	-
Croatia	476,841	4.8%	472,921	8.0%	3,920	0.1%
Monaco	187,647	1.9%	159,285	2.7%	28,362	0.7%
UK	710,625	7.1%	138,625	2.3%	572,000	14.2%
Israel	116,079	1.2%	18,079	0.3%	98,000	2.4%
Total mainlands	9,948,233	100%	5,917,577	100%	4,030,656	100%
Greece	2,233,215	40.1%	2,041,331	58.8%	191,884	9.2%
Italy	1,647,576	29.6%	507,576	14.6%	1,140,000	54.5%
Spain	846,801	15.2%	319,563	9.2%	527,238	25.2%
Malta	387,287	7.0%	359,463	10.4%	27,824	1.3%
France	162,320	2.9%	162,320	4.7%	-	-
Cyprus	285,757	5.1%	82,077	2.4%	203,680	9.7%
Total Islands	5,562,956	100%	3,472,330	100%	2,090,626	100%

Source: elaborations on Mediterranean cruise database (2007)

Table 2: Cruise passengers flows generated by the cruise companies in the Mediterranean ports

Ports	Countries	Total passengers flows	Share (%)	Passengers in transit	Share (%)	Embarking and disembarking flows	Share (%)
Barcelona	Spain	1,252,372	12.6%	548,522	9.3%	703,850	17.5%
Civitavecchia	Italy	1,051,702	10.6%	520,102	8.8%	531,600	13.2%
Venice	Italy	851,015	8.6%	80,258	1.4%	770,757	19.1%
Naples	Italy	771,581	7.8%	771,581	13.0%	-	-
Piraeus	Greece	726,409	7.3%	308,281	5.2%	418,128	10.4%
Gibraltar	UK	710,625	7.1%	138,625	2.3%	572,000	14.2%
Savona	Italy	498,448	5.0%	76,824	1.3%	421,624	10.5%
Tunis	Tunisia	485,245	4.9%	485,245	8.2%	-	-
Dubrovnik	Croatia	476,841	4.8%	472,921	8.0%	3,920	0.1%
Livorno	Italy	472,289	4.7%	470,165	7.9%	2,124	0.1%
Nice-Villefranche	France	392,096	3.9%	363,810	6.1%	28,286	0.7%
Genoa	Italy	383,060	3.9%	60,054	1.0%	323,006	8.0%
Kusadasi	Turkey	354,596	3.6%	336,180	5.7%	18,416	0.5%
Marseille	France	305,853	3.1%	275,804	4.7%	30,049	0.7%
Katakolon	Greece	305,425	3.1%	305,425	5.2%	-	-
Istanbul	Turkey	254,535	2.6%	180,425	3.0%	74,110	1.8%
Bari	Italy	221,049	2.2%	221,049	3.7%	-	-
Monte Carlo	Monaco	187,647	1.9%	159,285	2.7%	28,362	0.7%
Cannes	France	131,366	1.3%	124,942	2.1%	6,424	0.2%
Haifa	Israel	116,079	1.2%	18,079	0.3%	98,000	2.4%
Total mainlands		9,948,233	100%	5,917,577	100%	4,030,656	100%
Palermo	Italy	1,431,584	25.7%	291,584	8.4%	1,140,000	54.5%
Palma De Mallorca	Spain	846,801	15.2%	319,563	9.2%	527,238	25.2%
Rhodes	Greece	526,171	9.5%	458,171	13.2%	68,000	3.3%
Mykonos	Greece	516,438	9.3%	516,438	14.9%	-	-
Santorin	Greece	473,263	8.5%	473,263	13.6%	-	-
La Valletta	Malta	387,287	7.0%	359,463	10.4%	27,824	1.3%
Limassol	Cyprus	285,757	5.1%	82,077	2.4%	203,680	9.7%
Corfu	Greece	273,956	4.9%	225,290	6.5%	48,666	2.3%
Heraklion	Greece	228,767	4.1%	153,549	4.4%	75,218	3.6%
Messina	Italy	215,992	3.9%	215,992	6.2%	-	-
Patmos	Greece	214,620	3.9%	214,620	6.2%	-	-
Ajaccio	France	162,320	2.9%	162,320	4.7%	-	-
Total Islands		5,562,956	100%	3,472,330	100%	2,090,626	100%

Source: elaborations on Mediterranean cruise database (2007)

6. Economic impact of cruise tourism in the Island's

After having identified the amount of daily cruise visitors (DCV) in the islands, it is now interesting to show their expenditure behaviours, in order to better understand the economic impact factor generated by the cruise market. This approach could have some implications in terms of destination policy, particularly for islands that belong to a network of cruise ports of call.

Looking at the total amount paid by customers for their cruise vacation we can argue that cruise company are the main recipients. They manage and distribute passenger expenditure to the other providers for airfares, port fees, accommodation, food, entertainments, etc..

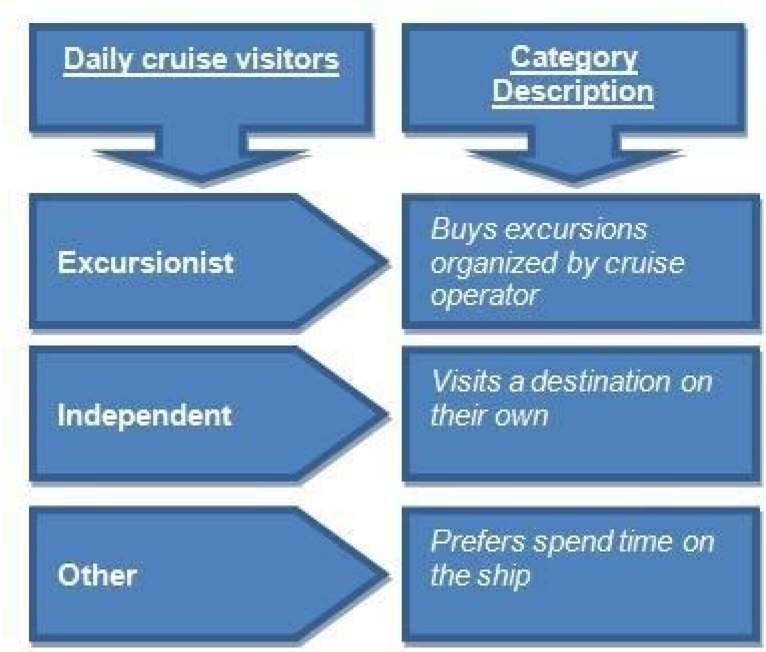
A smaller component of services or goods not included in the cruise package, as excursions, beverage on the ship, tips, etc. are the additional expenses that we can consider as potential recipients in each ports of call, totally managed by the cruise passenger. This evidence appears in preceding studies (Douglas. N., 2004).

More consideration should be made regarding the passenger's decision to buy excursion programmes, organized by the cruise company, or independently choose and organize visits to single locations for each port of call.

According to some results of the major cruise lines' surveys, operating in the Mediterranean areas, we can distinguish three categories of cruise passengers.

This way DCVs are excursionists, independent visitors or ones who know destinations and prefers spending time on the ship (Figure 2).

Figure 2: The different types of daily cruiser visitors



Survey results show how much, in the ports of call in the Islands, cruise passengers prefers to organize a visit to the town or to the coastal areas on their own. Probably islands are considered easier to access and often due the small dimension of the town look to be friendlier to visitors. The percentage of people that prefer spending time on the ship is less relevant taking into account the islands' situation.

It means that we can expect a different expenditure patterns in the two case study, due to the dissimilar decision behaviour.

Starting with the total DCV flows, and taking in consideration the cruise passenger behaviour show in the table, we derived the two main visitors flows: DCV independent and the ones who choose to visit the transit destination buying a pre-packaged excursion.

Matrix shows the prevalence of cruise passengers that choose to get excursion programmes, 5,652,037 on the total visitors 9,389,907. Independent passengers instead are relevant particularly for the small and Medium size islands. The total visitors achieve the 3,525,626 units, and in some case considering the short time of the visit is a challenge for the management of the harbour and the small town.

Another step in the analysis should be done to evaluate the economic impact of the DCV categories in the two territories. An estimation on the passengers survey available from Carnival Cruise Company that operates in the Mediterranean sea has been used, comparing with information available form the Mediterranean Port Authority. The tables show the average pro capita expenditure, considering the different locations of the ports of call.

In the islands, the average pro-capita expenditure is less compared to the ones on the mainland. It is possible to argue that in the islands the excursion does not often includes cultural programmes and are often planned half day tours.

Data presented draw us to the estimation of the economic impact generated on the territories from the expenditure decision of the DCV.

The total expenditure for the DCVs was calculated considering the product of the two matrixes: the average pro-capita expenditure matrix in the table 5 and the DCV flows matrix in the table 4.

By analyzing the economic impact of cruise tourism in the ports of call, especially in the Mediterranean islands, we can observe the economic relevance of these cruises. It means that each cruise stop represent for harbour and tourism destination an opportunity for the local market and for the economic activities. Economic impacts offered by the excursionists are also relevant, but have less effects, because a percentage of it comes back to the cruise company in terms of commission on sale. Cruise lines are interested to manage excursions programmes but they have also to take into account the attractiveness of the destinations for the independent cruise passengers.

Looking at the composition of the expenditure for independent CDSs, we can argue, according with some conclusion coming from the literature (Douglas, N, 2004) cruise companies, that main categories are: transports, tickets and guides, shopping, food and others non-relevant components.

Some activities as local transportation systems and restaurants, bar, coffee shops and others are the main services DCVs search for.

As for shopping, visitors often search for something that could represent a local and unique resource, avoiding international brands. This means that each port of call, as a stop-over destination, should be different and unique compared to others, looking from the DCVs' point of view.

Implications for economic impacts are more significant than we can imagine, but we have to underline that the expenditure basket changes accordingly to tourists' characteristics, cruise itineraries and, of course, the ports of call and the structure of the local economies.

Table 3: Cruise passenger behaviours in the port of call (island and mainland)

DCV	Category Description	Mainland	Islands
Excursionists	buy excursions organized by cruise operator	0.65	0.52
Independent	visit a destination on their own	0.32	0.47
Others	prefers spend time on the ship	0.03	0.01
Total	Cruise passenger category	1.00	1.00

Source: Observatory on Tourism in the EU Islands on European cruise line database (2007)

Table 4: DCV flows in the main ports of call in the Mediterranean area (2007)

Ports	Total DCV	Independent	Excursionist	Others
Islands Port of call	3,472,330	1,631,995	1,805,612	34,723
Mainland port of call	5,917,577	1,893,625	3,846,425	177,527
Total transit visitors	9,389,907	3,525,620	5,652,037	212,251

Table 5: DCV's average pro-capita expenditure – expressed in Euro

Ports	Independent	Excursionist
Islands Port of call	38.00	45.00
Mainland port of call	42.00	50.00

Source: Estimation based on Carnival Cruise line database (MediterraneanCruise 2007)

Table 6 Economic impact of cruise tourism in the Island's and in the main port of calls in the Mediterranean area (2007) – expressed in Euro

Ports	Total DCV	Independent	Excursionist
Islands' port of call	143,268,350	62,015,810	81,252,540
Mainland's port of call	271,853,500	79,532,250	192,321,250
Total transit visitors expenditure	415,121,850	141,548,060	273,573,790

7. Conclusions

In the future, the Mediterranean area is going to hold a higher market share as a destination region in the world cruise market.

New vessels will be responsible for increasing the number of stops in the Mediterranean harbours and cruise passengers flows will increase too.

Cruise lines are looking for new itineraries and new ports to extend their offer, also increasing the number of passengers in all the European countries. It means that more territories and tourist destinations will have in the next years the opportunity to take advantage of the cruise lines.

The aim of this paper was to determine and analyze the effects of cruise tourism in the Mediterranean ports of call for islands and no island territories.

The previous data indicates that islands manage approximately 36% of the total cruise passenger flows, and most of them are concentrated in Greece followed by Italy and Spain.

Islands are preferred stops for cruise operators and they often appear in the principal cruise Mediterranean itineraries.

Secondly data shows the high presence in the Mediterranean islands of ports of call instead of home ports. It means that Islands are chosen as stops-over along the cruise itineraries and seem to be more able to handle daily visitor flows instead of terminal points.

A new framework was proposed to estimate the contribution of the CDV, considering the two categories: excursion buyers or independent passengers.

In the islands case, cruise daily visitors preferred to be independent during the stop, looking for a real experience in the island, organizing the visit on their own, searching and providing good and services from local suppliers. This could be interpreted because islands have an important key factor due to their specificity based on the easy and open way to the territory.

Considering that, in the islands, the average pro-capita expenditure is less, compared with the ones in the mainland, this territory could have in the near future the opportunity to increase the passenger spending opportunities. This way, islands, could offers a local and unique resource, avoiding international brands.

This way the main effort is to build around the expenditure categories new businesses providing goods and services, since visitors often search for something that could recall in the future the visit to the islands.

In order of taking advantage of this kind of trend, the EU islands could organize their local economies, creating patterns that are able to capture the cruise expenditure capacity, reducing spill over effects and import flows.

Islands represents important stops-over along the cruise itinerary, and should develop an economic system around the DCV expenditure related to independent visitors.

It is also important to keep in mind that DCVs could become the future tourist demands for the islands, which means that local policy makers should implement tourism policies trying to convert daily cruise visitors into effective tourist demand.

Then the consolidation of the local island economies, through cruise tourism, should become a priority to be taken advantage of, considering this supplementary tourism demand.

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