Adriatic Sea Tourism Report

2017

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RISPOSTE TURISMO

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is a project by

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The 2017 edition is presented on the occasion of

ADRIATIC SEA FORUM
CRUISE FERRY SAIL & YACHT
BUDVA, 2017
APRIL 27-28

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ADRIATIC SEA TOURISM REPORT
2017 EDITION

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Adriatic Sea Tourism Report and Adriatic Sea Forum are projects by

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METHODOLOGY

Risposte Turismo produces for the fifth year this Adriatic Sea Tourism Report through direct requests addressed to the key stakeholders in maritime tourism. Answers and results are checked with other official statistics.
Moreover, each year we carry out two direct surveys to address issues related to nautical demand.
The following is a list regarding the main assumptions and features of this report:

- for the purposes of this study, a cruise ship is considered to be a ship travelling to multiple destinations (so excluding day cruises) according to a fixed itinerary.
- Cruise and ferry traffic data has been directly collected from Adriatic ports and terminals, and combined and checked with data from national statistics offices.
- Cruise traffic of the entire Mediterranean Sea from MedCruise and CLIA data sources, has been processed and integrated by Risposte Turismo with data referring to ports that are not members of the associations.
- Forecasts for cruise and ferry traffic have been directly provided by single ports and terminals. Where not available, some values (passenger movements or calls) have been estimated by Risposte Turismo according to multi-year data sets, quarter trends and scheduled ships.
- Maps of the main cruise and ferry routes in the Adriatic Sea have been created by Risposte Turismo to calculate how many times a cruise ship or ferry goes from one port to another with data based on information collected from the online cruise and ferry catalogues (or booking forms) of companies sailing the Adriatic in 2017.
- As Greek and Italian coastlines exceed the Adriatic, only the ports of Corfu, Igoumenitsa and Patras are considered Adriatic, while only part of the Apulia region is included (until Punta Meliso - S. Maria di Leuca).
- The nautical tourism data offer is compiled through an ad-hoc count of moorings and marinas based in the Adriatic Sea. Desk research was conducted in order to map all berths and marinas available for the 2017 season in the Adriatic area. Starting from the data already available from Risposte Turismo, the work carried out consisted of eliminating berths that no longer existed and adding the new berths in order to complete a new comprehensive database of berths and structures located in the Adriatic Sea.
- Two surveys were conducted from February to April on marinas and charter companies. As is the case each year, a Risposte Turismo database consisting of 331 marinas and 227 charter companies was used to send dedicated forms to the samples, who were asked to fill in the forms with data and information relating to the last season (2016) and forecasts for the upcoming season (2017). In this edition, 65 marinas and 24 charter companies took part in the survey by completing the form, representing in the first case 19.3% of all active operators.
- Regarding the intensity of the maritime tourism at the end of the first chapter, seven factors were identified and each of these factors was then rated on a scale from 0 to 5, for which 5 is the value registered by the strongest Adriatic region. Factors were calculated for cruise ships and ferries using passenger traffic and calls (demand), and for nautical tourism using the number of structures and berths in the region (supply).
- The stakeholders' comments, included in the chapter 5, were collected through a few open questions.

1 MARITIME TOURISM IN THE ADRIATIC SEA

The 5th edition of Adriatic Sea Tourism Report (ASTR) continues the annual analysis and description of maritime tourism in the Adriatic Sea, with information and data that have been updated every year since the first edition in 2013. This report provides in-depth quantitative and qualitative information on the three sectors of maritime tourism in the Adriatic Sea: cruise, ferry and sail and yachting tourism. The results of this edition were presented in Montenegro during the 3rd edition of *Adriatic Sea Forum – cruise, ferry, sail & yacht* (Budva, 27-28 April).

As summarized in the previous methodology box, this report is the result of information and data collection directly carried out by Risposte Turismo thanks to extensive dialogue with several Adriatic stakeholders who collaborated. Among these, ports and marinas (individual and networks), passenger terminals, charter operators, navigation and tourism companies, national institutes of statistics, single tourism destinations, public administrations and tourism boards. ASTR contains also the results of analysis, researches, studies of data and info regarding traffic, investments, demand, supply, plans, strategies, priorities and obstacles within the maritime tourism sectors in the area.

In this 2017 edition a new listening activity with many different operators and stakeholders has been carried out. A field of work to highlight advantages, potentialities and issues of the Adriatic area from many points of view, which confirmed for example that this area is an international space that still requires efforts to be fully recognised as a unique destination. The last chapter is entirely dedicated to this.

A key role in the way toward a possible cohesion of the Adriatic area is increasingly played by the European Commission that, with its action plans, strategies and financed projects, contributes to facilitating collaboration within destinations and among stakeholders of the area. In May 2016 the 1st EUSAIR (EU Strategy for the Adriatic-Ionian Region) Forum took place in Dubrovnik (Croatia), and on this occasion the first steps of development of the Strategy were made. The Action Plan of the Strategy defined the 4 thematic Pillars: Blue Growth, Connecting the Region, Environmental quality, Sustainable tourism.

On the occasion of the 2nd EUSAIR Forum (that will take place in Ioannina – Greece – in May 2017) Blue Growth has been chosen as the central theme of discussion, in any case without excluding the other Pillars. It is interesting to note that EUSAIR Strategy does not have its own funds, but the many programmes of cooperation of the area turn to best account, and support, projects with activities and aims that are in line with the EUSAIR's. For these reasons we actively participate in these programs, encourage operators to do the same, and follow the possible improvements the EC would make in this regard.

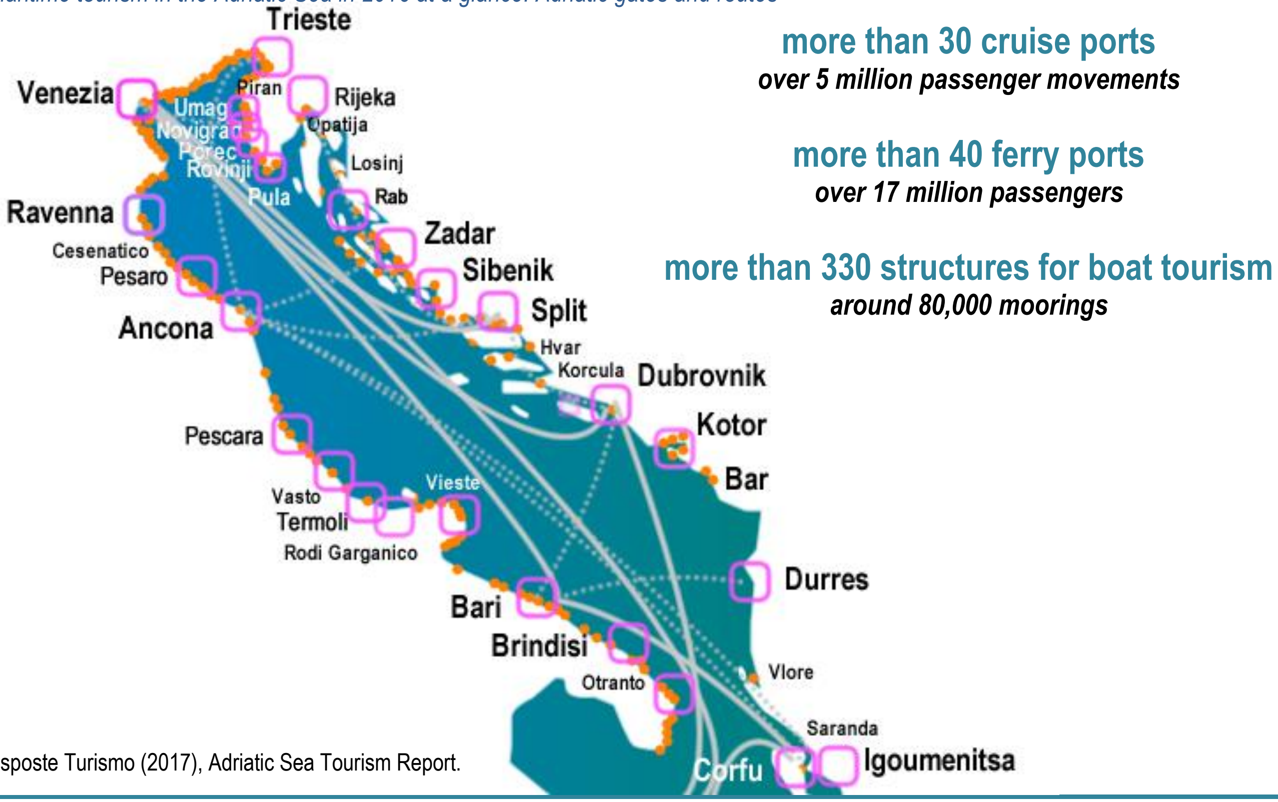
Many of these aims are at the base of the Adriatic Sea Forum project, which finds in the Adriatic Sea Tourism Report a core element - a document which could be also of use to the new EU programmes or projects involving the Adriatic region as it includes updated information with which to take on maritime, tourism and transport issues. In fact, during these first months of 2017, we entered a new cycle of programmes with opportunities of funding projects of cooperation. From the current new Italy-Croatia CBC Programme to the Italy-Albania-Montenegro programme, but also, in late 2017, a second call for programmes (such as Italia-Slovenia) will boost Adriatic development. These programmes encourage not only cooperation among the territories, by supporting projects in the fields of blue innovation, climate change adaptation, the environment, culture and transport, but also the identification of common needs to tackle together.

The 2017 edition of the report contains – in addition to methodology and this introduction – three chapters, each of which focused on the cruise, ferry and sail and yachting sectors, with graphs, tables and maps and an examination of the movements of tourists by sea, directions, dimensions and behaviours. As mentioned, the final chapter this year is dedicated to opinions, considerations, suggestions and thoughts from experienced stakeholders about the Adriatic and its maritime tourism. The report also includes a box focused on coastal tourism in the Adriatic, a setting so closed to the maritime one, with new info and data about tourism flows and bed availability in the municipalities of the 7 countries facing the Adriatic. Again this year a double ad-hoc survey on the nautical sector was conducted in the early months of 2017 and was addressed to marinas and charter companies. It highlights information related to demand and supply with a transnational perspective.

Regarding some results of 2016, more than 30 cruise ports exceeded 5 million cruise passenger movements (including transits, embarks and disembarks) and more than 17 million passengers travelled on a ferry, hydrofoil or fast catamaran in the Adriatic (with additional travellers crossing domestic channels and reaching islands by sea). The latest update on nautical tourism reveals more than 330 structures with around 80,000 moorings for boats. The following map provides a summary of these initial fundamental numbers.

The research of this year shows that the Adriatic again displayed an increase in cruise traffic (growth for two years in a row after the drop in 2014), despite the fact that the leading port of Venice is still suffering from traffic restrictions. The Adriatic is the area of the Mediterranean Sea with the highest positive variation in 2016 traffic compared to the previous year. Also ferry, hydrofoil and fast catamaran traffic provided a positive signal in 2016 in terms of passengers on board. From the boating angle, interviewed marinas and charter companies noted an increase in their clientele in 2016, providing a more positive framework than that emerging from the results of the previous year. Therefore the results reveal an overall positive framework in maritime tourism and transport in the Adriatic in 2016.

Map 1] *Maritime tourism in the Adriatic Sea in 2016 at a glance: Adriatic gates and routes*



Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

Some changes have been noted in terms of overall traffic distribution by country and in terms of routes operated by cruise companies. The cruise industry is seeking a new balance, pending a definitive solution for Venice, and in the meantime results are highly positive in the southern part of the area (especially Corfu and Kotor). Ferries are witnessing growth once more, partly thanks to lower bunker costs, with operators introducing or planning to introduce new routes.

The trends registered on nautical sector about clientele of marinas and charter companies revealed positive results in 2016, and optimistic vision of expected activities and confidence for the upcoming season. Moreover, investments in new marinas and renovation work on existing ports have also been noted. This is an interesting scenario, likely to bring positive new developments in the medium term.

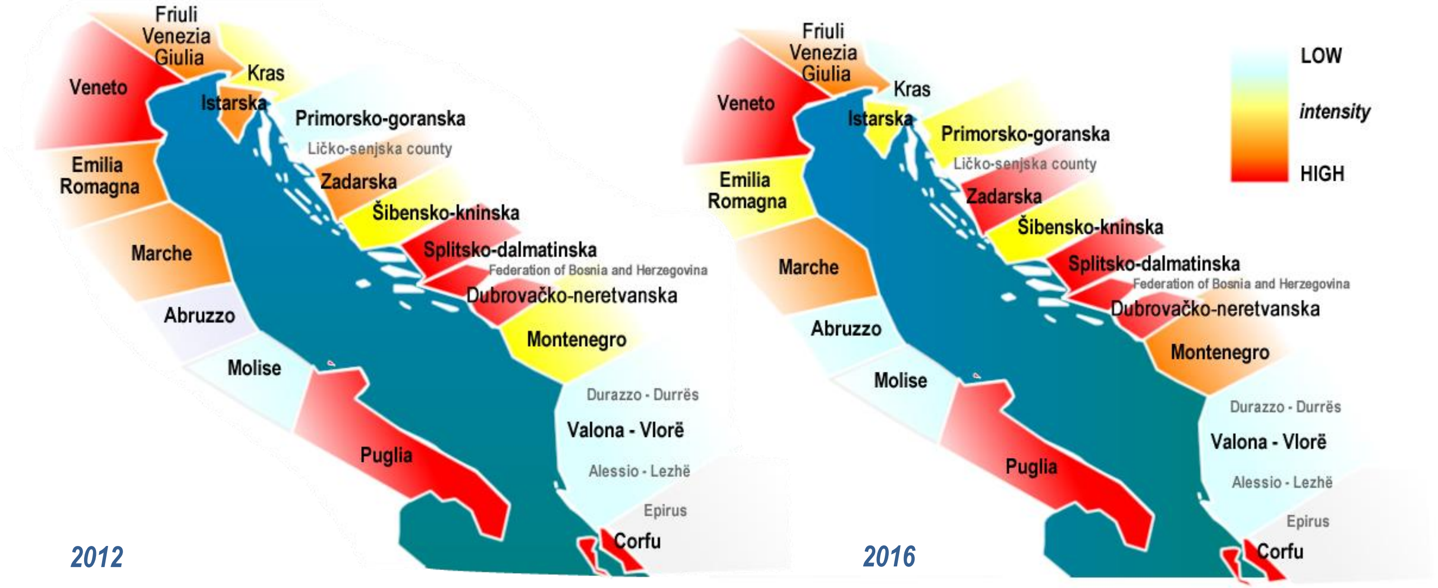
Focusing on the current season, ASTR forecasts reveal different trends in the various sectors of maritime traffic and tourism in the Adriatic. A marked decrease in cruise traffic - common to what is happening in the entire Med - a kind of stability of ferry traffic and again positive results in the nautical sector.

Since the first edition of the report we have highlighted the relevance and potentialities of the Adriatic as a tourist destination and the opportunity to consider maritime tourism as a whole. Each of its components is influenced by issues and challenges that the businesses have in common, such as for example land accessibility, port facilities and infrastructures, relationships with local communities, investments and promotional activities.

The map in the following page illustrates the present (on the right) intensity of maritime tourism (as a combination of the three components) of each Adriatic region compared with the intensity we recorded in 2013 on the occasion of the first edition of the report (on the left). It shows how traffics and activities are (or aren't) distributed and balanced in the various areas and how the regions can benefit from maritime tourism as an economic source. 6 regions (Veneto and Puglia in Italy, the regions of Zadar, Split and Dubrovnik in Croatia, and Corfu region in Greece) confirm their high level of intensity in each sector, while on the other hand there are areas with a low involvement in maritime tourism, with no more than small ports able to host cruise or ferry ships, mainly not so big, or a limited marinas supply. It is not just a way to express ranking, but to understand if an area has maritime tourism gaps to be filled through addressing its investments, activities, programs, initiative and so on, always keeping in mind, of course, that each region may have its own priorities and aims.

Compared to the maritime tourism intensity in 2012 shown in the map on the left, some changes are visible, in particular for the regions of Primorsko-Goranska, Zadarska and Montenegro that increased their level (mainly thanks to a growth in cruise traffic respectively in Rijeka, Zadar and Kotor), while Emilia Romagna, Kras, Istarska and Vlorë areas show a decrease (mainly due again to cruise traffic in Ravenna and Durres and to the ferry, hydrofoil and fast catamaran traffic in the Kras and Istarska regions).

Map 2] *Maritime tourism intensity in the Adriatic regions (combination of cruise, ferry, sail and yacht tourism), 2012 and 2016*



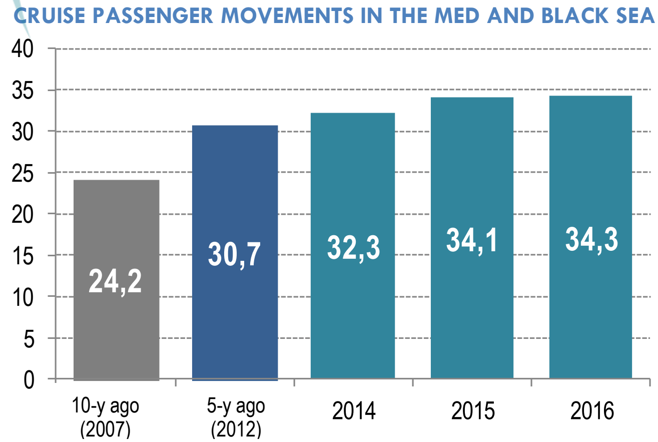
Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

HIGHLIGHTS OF ADRIATIC SEA TOURISM REPORT 2017:

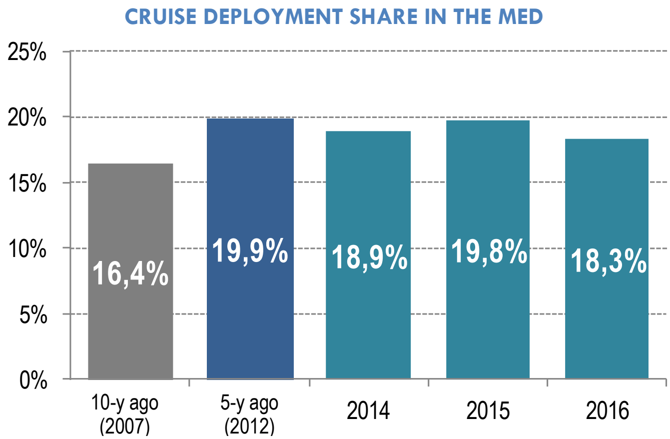
- 2016 came to a positive close for all forms of maritime tourism in the Adriatic.
- 5 million cruisers in 2016 in the Adriatic Sea (+5.5% on 2015), a number that confirms the Adriatic's marked cruise commitment (it is also the Mediterranean area that presents the highest positive variation on 2015).
- Cruise traffic is present throughout year, with the period from May to October concentrating more than 85% of total traffic.
- The Adriatic is mainly characterized by transit traffic (but Venice and Trieste present a share of embarks and disembarks higher than transit traffic).
- A drop in cruise traffic is foreseen for 2017: 4.73 million passenger movements and about 3,400 cruise calls are expected.
- Italy leads the ranking in cruise passenger movements, and Croatia in terms of ferry, hydrofoil and fast catamaran traffic.
- A total of more than 17.6 million passengers was reached in 2016 for ferry, hydrofoil and fast catamaran traffic (+3.5% on 2015), with more than 83,000 calls (+4.6%).
- Ferry traffic shows a more pronounced seasonality concentration, especially due to routes operating only in summer or in any case during a limited period of the year (with a peak in August).
- The Italian port of Bari is the first in terms of international traffic in the Adriatic (1.1 million), followed by Ancona (about 950,000) and Durres (840,000).
- Ferry traffic fluctuates less than cruise traffic, and that is why the ranking of ports in 2016 remained substantially the same compared to 2015; forecasts are difficult to define, but for 2017 this traffic is expected to be slightly higher than for the previous year.
- The updated mapping of marinas and small ports dedicated to nautical tourism revealed, over the last few months, more than 330 structures (331), with around 80,000 moorings (78,238) located in the Adriatic area.
- Italy leads the ranking in terms both of berths (62.2% of total) and structures (56.8%). While the number of structures in Slovenia, Montenegro and Greece is lower than in Italy and Croatia, the average number of berths per structure is almost double.
- We deduced a positive outlook for nautical tourism from the 2016/2015 variation both for marinas and charter companies.
- A positive picture of turnover in the nautical sector was provided by a sample of surveyed marinas and charter companies, with fairly positive clientele trend forecasts.

2 CRUISE TRAFFIC

Graphs 1 & 2] *Cruise passenger movements and deployment of ship cruises in the Mediterranean and Black Sea, 2007 -2016*



Source: estimations from MedCruise data "Cruise Activities in MedCruise ports", various editions. Note: Values in million.



Source: elaborations from data appeared in CLIA "State of the Industry", various ed.

According to the most recent data, 24.2 million cruisers have been estimated at a global level in 2016 by CLIA (Cruise Lines Int.l Association) and the value is expected to rise in 2017 to 25.3 million, thanks to very high occupancy rates and new cruise ships introduced every year.

Focusing on the Mediterranean, after the growth in 2015, the area remained quite stable in 2016 in terms of cruise passenger movements (more than 34 million), as shown in graph. 1.

The Mediterranean Sea is the second destination area in terms of lower berths capacity (with a share on total in 2016 of 18.3%), behind the Caribbean. The expected share for 2017 will fall to 15.5% and, if confirmed, will represent the lowest data of the last 10 years. It should be noticed in any case that the number of lower berths had doubled in 10 years rising from 14.7 to 26.3 million from 2007 to 2017. The cruise lines supply is not decreased in the Med area, but it experienced a drop in the share on total, due to higher competition among all areas (especially Asia, that today holds a share of 11%).

Table 1] *Cruise passenger traffic in the 4 macro areas of the Mediterranean in MedCruise ports, share percentages, 2012-2016*

Region	2016	2015	% Variation 2016 on 2015	2014	2013	2012	% Variation 2016 on 2012
WEST MED	20,077,773	19,641,139	2.2%	17,971,531	18,857,996	18,546,398	8.3%
ADRIATIC	**4,746,762**	**4,532,940**	**4.7%**	**4,604,764**	**5,117,572**	**4,859,013**	**-2.3%**
EAST MED	2,604,421	3,516,851	-25.9%	3,022,838	3,583,558	3,261,300	-20.1%
BLACK SEA	16,742	70,934	-76.4%	162,588	187,872	146,249	-88.6%
Total	**27,445,698**	**27,761,864**	**-1.1%**	**25,761,721**	**27,746,998**	**26,812,960**	**2.4%**

Source: MedCruise (2017), "Cruise Activities in MedCruise ports". Note: the figures refer to members of MedCruise and therefore, even if they are representative of the entire Mediterranean area, they are an underestimate (around 4/5 of total cruise passenger movements in the Med).

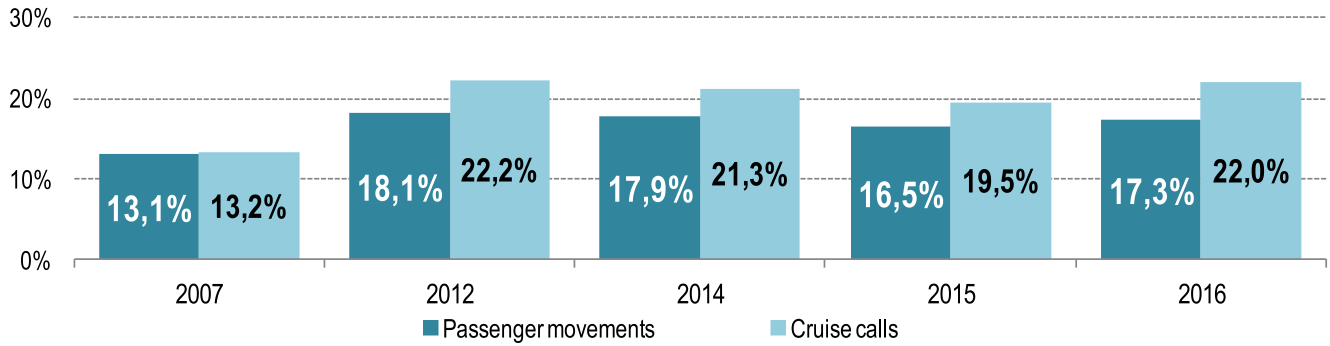
Table 2] *Cruise calls in the 4 macro areas of the Mediterranean in MedCruise ports, share percentages, 2012-2016*

Region	2016	2015	% Variation 2016 on 2015	2014	2013	2012	% Variation 2016 on 2012
WEST MED	8,617	8,284	4.0%	8,327	8,881	8,641	-0.3%
ADRIATIC	**2,961**	**2,578**	**14.9%**	**2,917**	**3,221**	**3,259**	**-9.1%**
EAST MED	1,861	2,590	-28.1%	2,140	2,430	2,525	-26.3%
BLACK SEA	28	81	-65.4%	332	332	237	-88.2%
Total	**13,467**	**13,533**	**-0.5%**	**13,716**	**14,864**	**14,662**	**-8.2%**

Source: MedCruise (2017), "Cruise Activities in MedCruise ports". Note: the figures refer to members of MedCruise and therefore, even if they are representative of the entire Mediterranean area, they are an underestimate (around 4/5 of total cruise calls in the Med).

More than 100 Mediterranean ports figure in the itineraries of cruise companies; among them there are, on one hand, large developed ports, with facilities and structures dedicated to this traffic, and, on the other, ports having only recently entered the cruising map.
The traffic in the Mediterranean Sea in 2016 remained essentially stable on the previous year according to MedCruise members, with more than 27 million passengers and 13,500 calls. A consistent drop occurred in the areas of the East Med and Black Sea, while the Adriatic (considering its MedCruise members alone) is the area with the highest positive variation both in terms of passenger movements (+4.7%) and cruise calls (+14.9%). Considering the last five years, there has been an increase in passenger movements (+2.4%), but a negative variation in terms of cruise calls (-8.2%). This may be explained by larger ships sailing in the Mediterranean Sea: while in 2012 there was an average of 1,800 passenger movements per call, last year Mediterranean ports recorded more than 2,030 per call (+13%).

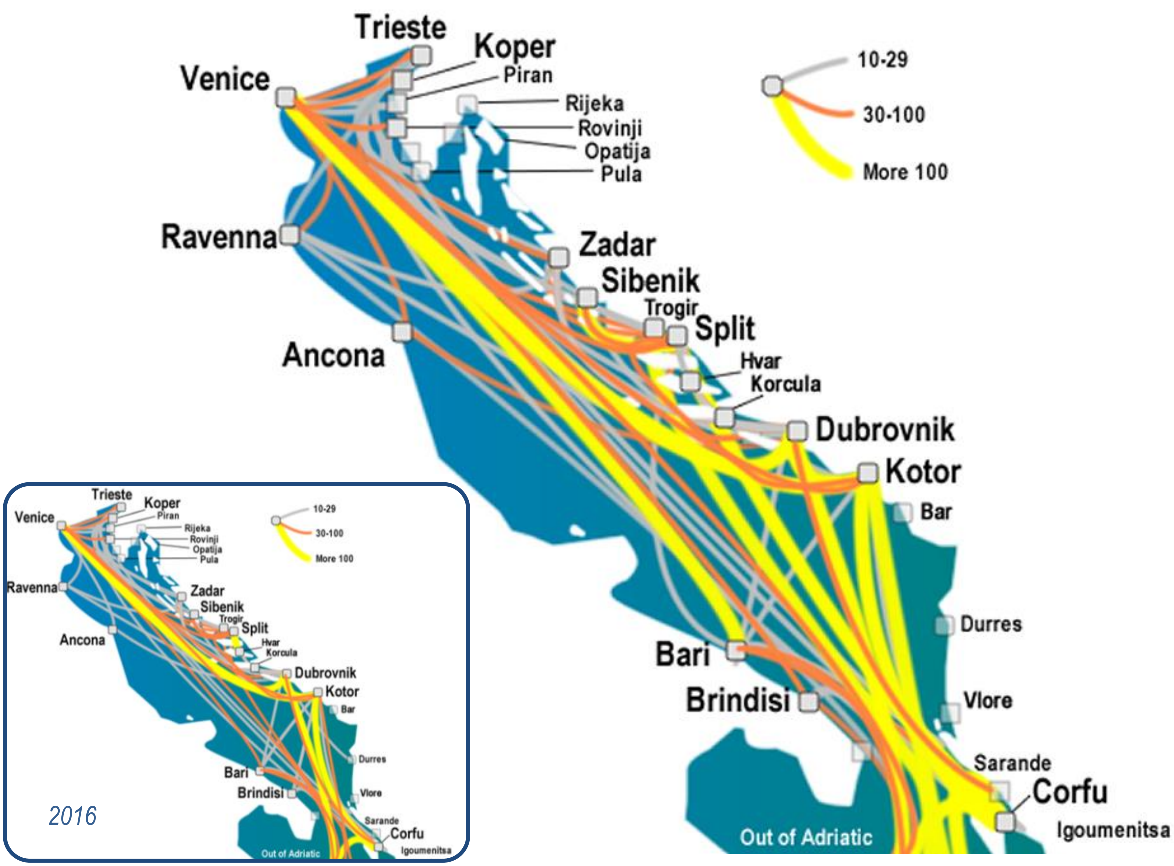
Graph 3] *Adriatic cruise passenger movements and cruise calls share of the Mediterranean 2007, 2012 and 2014-2016*



Source: MedCruise (2017), "Cruise Activities in MedCruise ports" and previous editions. Note: the figures refer to members of MedCruise and therefore, even if they are representative of the entire Mediterranean area, they are an underestimate.

In the cruising geography of Mediterranean, the Adriatic Sea increased its role both in terms of passenger movements and calls in 2016 compared to the previous year (after a drop registered in 2015), representing 17.3% of overall passengers and 22.0% of calls.
However, these values are similar to those registered 5 years ago. A more evident development is revealed on comparison of the shares with the total in the decade 2007-2016, although growth appeared in particular in the earlier period (2007-2012).

Map 3] *Main cruise routes in the Adriatic Sea, 2017*



Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

Venice, Dubrovnik, Corfu and Kotor confirm their leadership as ports on the main cruise routes in the Adriatic Sea. Compared to last year, a higher frequency is calculated on the routes connecting Venice to Split and Bari and also to other ports located in the Northern Adriatic such as Ravenna, Ancona and Zadar. Also for 2017, a number of routes sailing directly out of the Adriatic are planned, especially from/to Corfu and Dubrovnik (one port that is often linked to Adriatic ports is Malta by P&O Cruises). In any case the Adriatic continues to show a dense cruise framework of links.

Table 3] *The main 20 cruise ports of the Adriatic and overall traffic, absolute values and percentages, 2016 and variations on 2015*

	Cruise port	Country	Cruise traffic		Share % on total		Variation % on 2015	
			passenger movements	calls	passenger movements	calls	passenger movements	calls
1	VENICE	ITA	1,605,660	529	31.7%	14.2%	1.5%	1.5%
2	DUBROVNIK	HR	833,588	639	16.5%	17.2%	2.6%	6.0%
3	CORFU	GRE	748,916	481	14.8%	12.9%	15.7%	18.2%
4	KOTOR	MON	535,232	493	10.6%	13.3%	19.3%	20.0%
5	BARI	ITA	400,875	145	7.9%	3.9%	9.0%	-1.4%
6	SPLIT	HR	278,259	286	5.5%	7.7%	2.5%	9.6%
7	TRIESTE	ITA	145,991	61	2.9%	1.6%	8.7%	35.6%
8	ZADAR	HR	136,462	114	2.7%	3.1%	82.8%	18.8%
9	KOPER	SLO	78,923	69	1.6%	1.9%	36.3%	40.8%
10	ANCONA	ITA	54,901	34	1.1%	0.9%	39.8%	41.7%
11	RAVENNA	ITA	45,613	44	0.9%	1.2%	14.1%	29.4%
12	HVAR	HR	34,260	128	0.7%	3.4%	14.9%	-4.5%
13	SARANDE	ALB	30,783	87	0.6%	2.3%	78.6%	0.0%
14	KORČULA	HR	29,407	159	0.6%	4.3%	-30.8%	19.5%
15	ROVINJI	HR	18,172	67	0.4%	1.8%	16.5%	21.8%
16	DURRES	ALB	14,760	25	0.3%	0.7%	83.1%	108.3%
17	RIJEKA	HR	13,876	15	0.3%	0.4%	52.8%	114.3%
18	SIBENIK	HR	12,276	106	0.2%	2.9%	-30.1%	15.2%
19	BAR	MON	8,660	7	0.2%	0.2%	n.a.	n.a.
20	IGOUMENITSA	GRE	7,623	7	0.2%	0.2%	146.7%	16.7%
	Other ports		30,138	231	0.6%	6.2%	-83.2%	-6.9%
	TOTAL		**5,064,375**	**3,727**	**100%**	**100%**	**5.5%**	**10.5%**

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report. Data provided to Risposte Turismo directly by cruise ports and national institutions (Croatian Bureau of Statistics, Hellenic Ports Association).

Venice again leads the table of the main 20 Adriatic cruise ports listed above, with 1.6 million passenger movements in 2016; Dubrovnik confirms its leadership in terms of cruise calls (more than 600) with a share of 17% on total. Notably more than 35 ports hosted cruise traffic in 2016.
The total cruise traffic in the Adriatic (that takes into account all the ports – this is the reason why the total differs from MedCruise traffic) exceeded for the third time the 5 million mark in 2016, with a positive result on 2015 that concerns also the number of cruise calls, that increased to 3,727.

Table 4] *Concentration of cruise passenger movements in Adriatic ports, 2014-2016*

Passenger movements	first 3	first 5	first 10
2016	63.0%	81.4%	94.1%
2015	63.6%	80.7%	95.1%
2014	69.9%	88.6%	97.0%

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

The concentration for the first ports was almost stable in 2016 compared to the marked decrease recorded between 2014 and 2015. The first three ports maintain more than half of total cruise traffic.

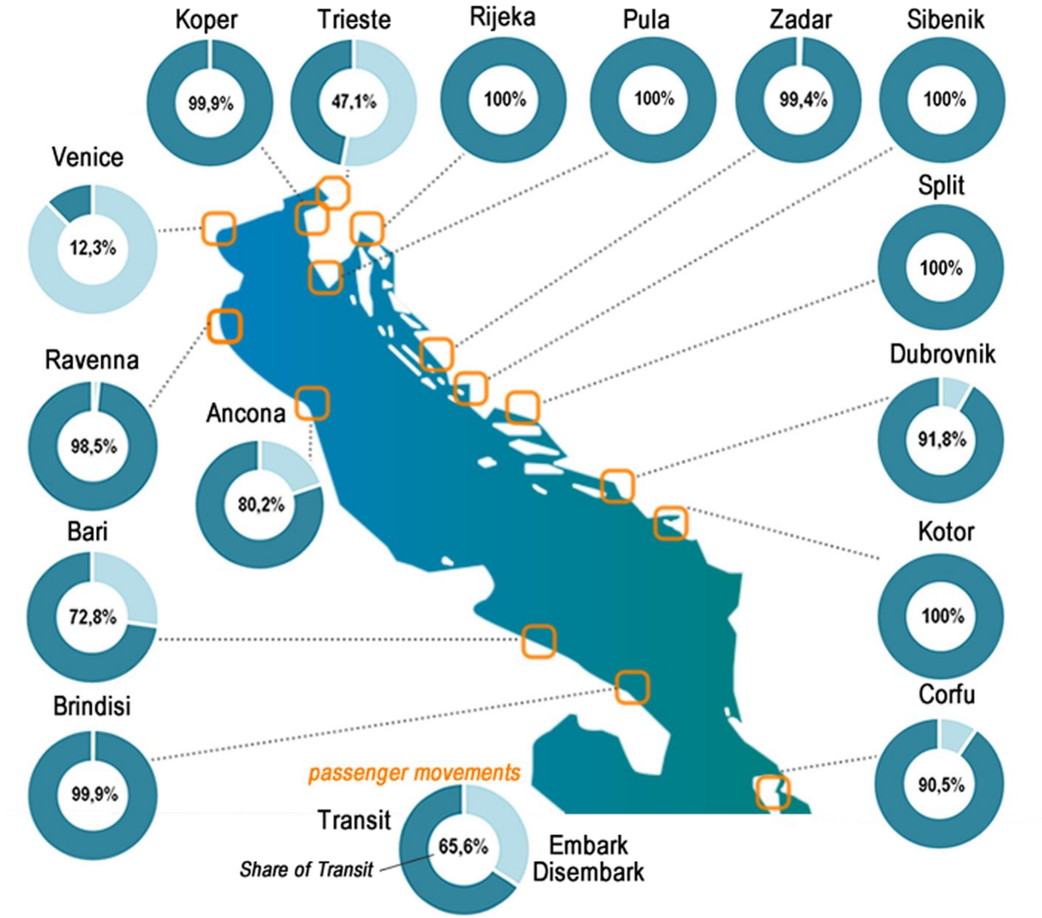
Table 5] *Cruise traffic by country, absolute values and share percentages, 2015 and 2016*

PORTS	2016		Share % on total		2015		Variation % on 2015	
Country	Pax. mov.	Calls	Pax. mov.	Calls	Pax. mov.	Calls	Pax. mov.	Calls
ITALY*	2,260,364	843	44.6%	22.6%	2,319,190	855	-2.5%	-1.4%
CROATIA	1,376,532	1,697	27.2%	45.5%	1,293,139	1,524	6.4%	11.4%
GREECE*	757,282	490	15.0%	13.1%	651,526	416	16.2%	17.8%
MONTENEGRO	543,892	500	10.7%	13.4%	448,579	411	21.2%	21.7%
SLOVENIA	79,562	80	1.6%	2.1%	60,913	66	30.6%	21.2%
ALBANIA	46,743	117	0.9%	3.1%	25,446	100	83.7%	17.0%
BOSNIA-HERZEGOVINA	0	0	0.0%	0.0%	0	0	0	0
TOTAL 2016	**5,064,375**	**3,727**	**100%**	**100%**	**4,798,793**	**3,372**	**5.5%**	**10.5%**

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report. Note (*): both for Italy and Greece, only their Adriatic ports are considered.

At a national level, Italy leads the ranking in passenger movements terms point of view, with about 2.3 million cruisers – representing the 44.6% of the total – and more than 800 cruise calls. Croatia boasts the highest number of calls, thanks to its numerous ports. All the Adriatic countries (except Italy) showed increases in 2016 both in terms of passengers and calls, with Albania showing the highest positive variation on the previous year, counting on the growth of the 3 ports of Sarande, Durres and Vlore. Montenegro experienced an increase in total cruise traffic, with Kotor with most of the national traffic but with Bar that is gaining a place for itself in Adriatic cruise geography.
Overall, in 2016 the Adriatic as a whole showed a positive year over year variation: +5.5% on passengers and +10.5% on cruise calls.

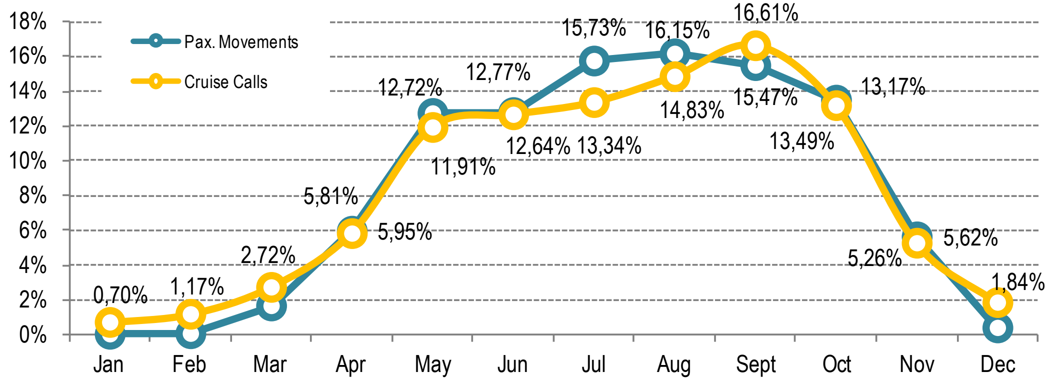
Map 4] *Percentage distribution of cruise traffic between embarks-disembarks and transits, 2016*

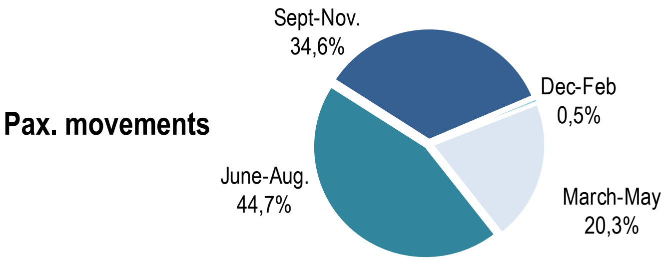


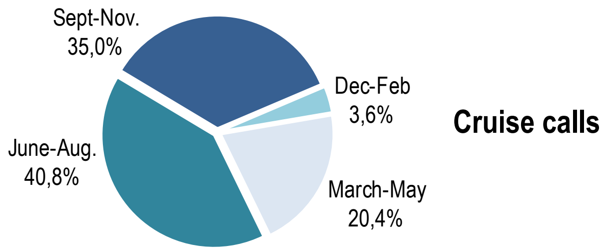
Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

The dynamics of cruise traffic in the Adriatic are connected to home port and transit activities of single ports. The map above shows that the Adriatic is mainly characterized by transit traffic, with Venice and Trieste showing a share of embark and disembark that is higher than transit traffic. Italy is the country with the highest number of ports with home in/out traffic.

Graphs 4 & 5] *Monthly and trimester share of cruise passenger movements (left pie) and cruise calls (right pie) of Adriatic cruise ports, 2016*



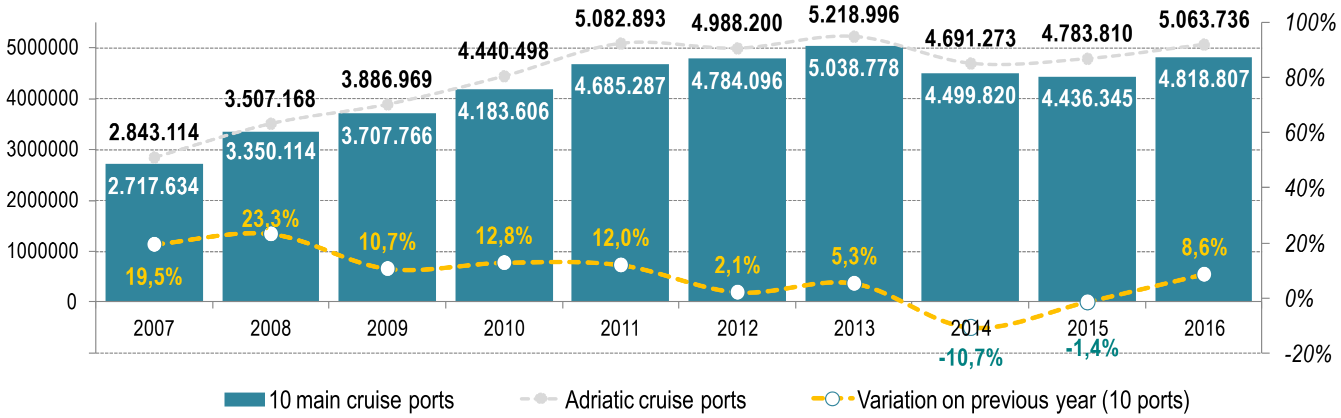




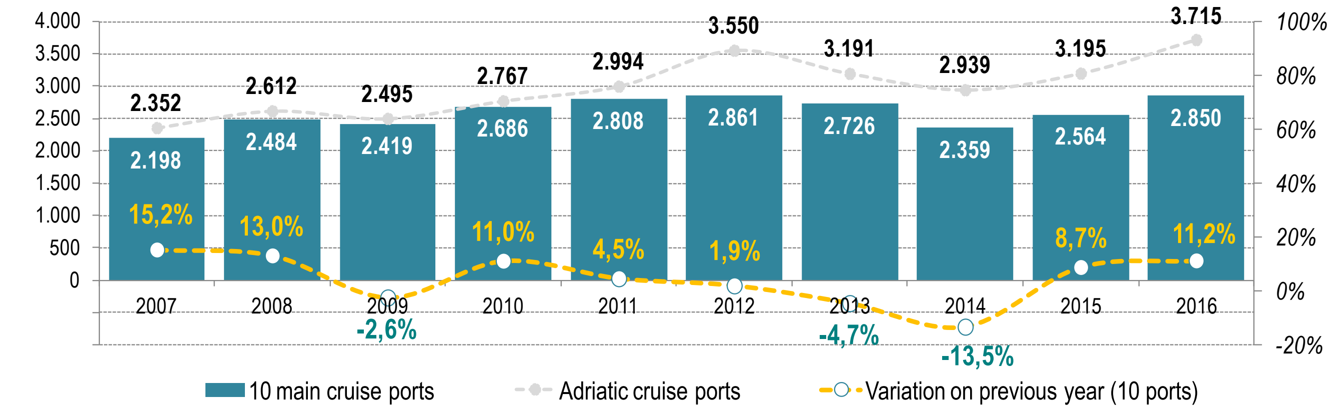
Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

The graphs above give seasonality and fluctuation details of cruise traffic in the Adriatic. Even if all the months see cruise sailing the Adriatic, the traffic concentrates in summer months, with a peak in August for passengers and in September for calls (with percentages higher than 16%). Lower traffic values are noted in the winter season. Cruise traffic is present during the whole year, with the period from May to October concentrating more than 85% of total traffic and values that never fall below 12%. The summer trimester from June to August holds more than 40% of the total of both passengers and calls.

Graph 6] *Trend of cruise passenger movements and growth rates in the main 10 and all Adriatic cruise ports, 2007-2016*



Graph 7] *Trend of cruise calls and growth rates in the main 10 and all Adriatic cruise ports, 2007-2016*



Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

Graphs 6 and 7 show trends of cruise passengers and calls in the last decade at the main 10 ports (with the variation on previous year) and at all Adriatic ports. Considering only the 10 main ports, in 2016 the volumes significantly increased on 2015 (+8.6% passengers and +11.2% calls, with better performance compared with all Adriatic cruise ports). As to total figures, in 2016, passenger movements overtook the level of 5 million for the 3rd time in the last ten years (after 2011 and 2013). Moving to cruise calls, these have increased for the second year in a row after the market fall in 2014.

Table 6] *Cruise traffic in Adriatic, forecasts for 2017 and variations on 2016*

	Pax. mov.	Calls	Variation 2017 on 2016			
	2017	2017	% Pax. mov.	% Calls	Abs. Pax	Abs. Calls
Ancona	54,900	31	stable	-8.8%	stable	-3
Bar	9,270	8	7.0%	14.3%	610	1
Bari	400,000	134	-0.2%	-7.6%	-875	-11
Brindisi	105,800	40	1,907.6%	185.7%	100,530	26
Corfu	635,000	408	-15.2%	-15.2%	-113,916	-73
Dubrovnik	744,598	537	-10.7%	-16.0%	-88,990	-102
Igoumenitsa	11,986	12	57.2%	71.4%	4,363	5
Koper	71,000	60	-10.0%	-13.0%	-7,923	-9
Kotor	500,000	459	-6.6%	-6.9%	-35,232	-34
Opatija	2,688	10	-20.8%	-44.4%	-704	-8
Pula	12,000	62	118.3%	226.3%	6,502	43
Ravenna	50,000	49	9.6%	11.4%	4,387	5
Rijeka	14,000	14	0.9%	-6.7%	124	-1
Rovinj	18,000	67	stable	stable	stable	stable
Sibenik	30,000	120	144.4%	13.2%	17,724	14
Split	270,000	229	-3.0%	-19.6%	-8,259	-56
Venice	1,422,000	473	-11.4%	-10.6%	-183,660	-56
Zadar	130,000	110	-4.7%	-3.5%	-6,462	-4
18 Adriatic ports providing forecasts on passenger movements: -6.51% on 2016						
Korcula	n.a.	137	n.a.	-13.8%	n.a.	-22
Durres	n.a.	9	n.a.	-64.0%	n.a.	-16
Monopoli	n.a.	11	n.a.	450.0%	n.a.	9
Ortona	n.a.	11	n.a.	new	n.a.	11
Pesaro	n.a.	11	n.a.	n.a.	n.a.	11
Sarande	n.a.	74	n.a.	-14.9%	n.a.	-13
Sistiana	n.a.	16	n.a.	n.a.	n.a.	n.a.
Trieste	n.a.	55	n.a.	-9.8%	n.a.	-6
26 Adriatic ports providing forecasts on cruise calls: -8.01% on 2016						
TOTAL FORECASTS 2017: 4.73 MILLION PASSENGER MOVEMENTS AND 3,428 CRUISE CALLS						

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report on data provided by single ports or terminals. Notes: forecasts on passenger movements are based on data for 18 ports (representing 94.7% of the total traffic registered in 2016) while cruise calls are based on data for another 8, also, making for a total of 26 ports (representing 91.8% of the total traffic registered in 2016).

The forecasts for 2017 cruise traffic in the Adriatic foresee a drop both in passenger movements and calls, of 6.51% and 8.01%, respectively, taking the traffic back to 2015 values. At the end of the year 4.73 million movements should be recorded in the Adriatic ports, with a total of about 3,400 calls. Venice will maintain its leadership with 1.4 million passengers (albeit with a variation of -11.4% on 2016). Most ports indicate negative variations on 2016, but some very positive variations must also be noted (Brindisi, Pula and Sibenik). It is interesting to note that in 2017 three new Italian Adriatic ports will join cruise itineraries: Ortona, Pesaro and Sistiana (the latter managed by Trieste Terminal Passeggeri).

3 FERRY, HYDROFOIL AND FAST CATAMARAN TRAFFIC

Compared to other components of maritime tourism, for the ferry, hydrofoil and fast catamaran the sources, researches and information that may be relied upon concerning demand and supply are less official in nature. This is so, despite the fact that sea passenger transport is a worldwide phenomenon that involves also vehicles and – from the commercial side – goods and products.

Thanks to low oil prices, which reduced the operating costs, the main European ferry groups demonstrated positive financial performances in 2015 (Shippax Market 2016). 2015 was also the first year when newbuilding capacity at a global level showed positive signs of recovery after a long time, due mainly to new ships delivered in (and destined for) Asia. During the period from 2011 to 2015 the global number of Ro-Pax units increased by almost a hundred (from 1,159 to 1,253). In 2015, in the Mediterranean Sea more than 460 million passengers were on board ferries (in addition to 213,000 cars and 10.2 million buses), with a share of 20.7% on total ferry passengers in the world.

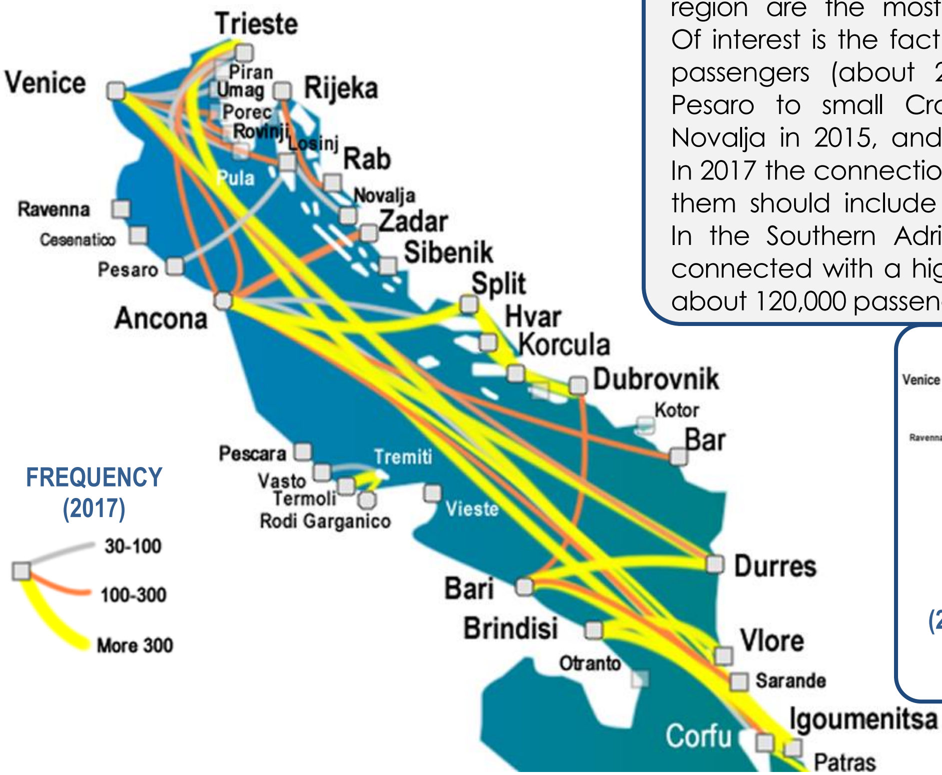
Focusing on the Adriatic, this area shows several ferry connections that cross it on both the horizontal and vertical axes, with some major routes that are highlighted on the next page. Considering the geographical structure of the Adriatic, ferries are a valuable means of transport. As cited in the previous editions of Adriatic Sea Tourism Report, the ferry traffic shows significant volumes of movements, values that increased again in 2016 on the previous year. The positive trend is also underscored on fast connections that include hydrofoils and fast catamarans. The strengths of this type of traffic are speed, operational flexibility (personalized timetables meeting demand, possibility of transfer among various routes) and reduced costs (capital costs and lower crew personnels than traditional ferries). However, such traffic presents a number of weaknesses, for example weather variability potentially affecting activity.

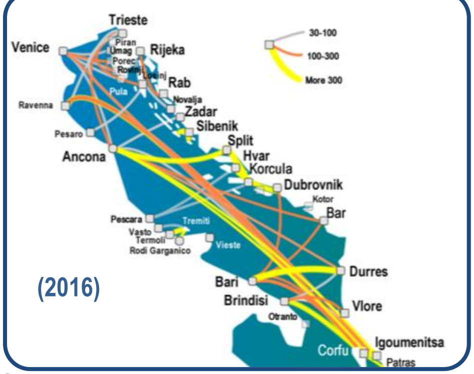
According to the latest Shippax, 2015 was a good year for vessel orders and deliveries, and in 2016 there were globally over 1,500 passenger vessels, 35 small passenger/vehicle fast ferries and 110 large ones in service. Vessels that could host only passengers account for 91% of fast ferries in service, and vessels for both passengers and vehicles account for 7% of total.

Map 5] *Main Adriatic ferry, hydrofoil and fast catamaran routes, 2017*

Focusing on the Adriatic Sea, some changes in the activities of ferry companies should be noticed: throughout 2017, in Venice 2 ships of Grimaldi Lines (previously working in Trieste with Minoan Lines) operate for the first time (connecting Venice to Greece) while the route between Bari and Bar will not function. The major routes remained those linking Italian ports with Greece (both sailing vertically the entire Adriatic but also through shorter journeys from southern Italy) followed by some routes connecting horizontally the Italian port of Ancona with Croatian ports and Bari or Brindisi with Albanian ports.

Hydrofoils and HSC (High Speed Craft) between Venice and the Croatian ports located in the Istria region are the most stable throughout the years. Of interest is the fact that a fast catamaran carries passengers (about 260) from the Italian port of Pesaro to small Croatian ports: Mali Losinj and Novalja in 2015, and in 2016 also Rab and Rovinj. In 2017 the connections should be doubled (some of them should include also the port of Cesenatico). In the Southern Adriatic, Corfu and Sarande are connected with a high speed hydrofoil that moved about 120,000 passengers during the 2016 season.





Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

Table 7] *Ferry, hydrofoil and fast catamaran overall traffic in Adriatic ports, absolute values and percentages, 2016 and variations on 2015*

	Port	Country	Traffic		Share % on total		Variation % on 2015	
			passenger movements	calls*	passenger movements	calls	passenger movements	calls
1	Split**	HR	4,511,967	14,254	25.6%	17.1%	3.0%	8.6%
2	Igoumenitsa	GRE	2,426,880	10,160	13.8%	12.2%	2.8%	1.8%
3	Zadar	HR	2,268,949	17,130	12.9%	20.5%	3.6%	24.6%
4	Corfu	GRE	1,582,466	13,712	9.0%	16.4%	6.9%	-1.2%
5	Bari	ITA	1,120,713	2,218	6.4%	2.7%	-0.3%	-41.2%
6	Korčula	HR	987,952	7,100*	5.6%	8.5%	2.4%	-0.1%
7	Ancona	ITA	950,178	2,710	5.4%	3.2%	-2.1%	2.4%
8	Durres	ALB	839,598	1,036	4.8%	1.2%	8.4%	-5.0%
9	Patras	GRE	576,991	1,400*	3.3%	1.7%	4.5%	7.7%
10	Dubrovnik	HR	550,102	5,100*	3.1%	6.1%	3.7%	0.0%
11	Brindisi	ITA	511,678	1,078	2.9%	1.3%	8.3%	24.5%
12	Šibenik	HR	276,234	2,784	1.6%	3.3%	2.7%	-1.2%
13	Sarande	ALB	251,311	1,534	1.4%	1.8%	30.8%	26.3%
14	Vlore	ALB	198,079	420	1.1%	0.5%	-9.8%	-2.3%
15	Venice	ITA	151,764	613	0.9%	0.7%	-1.7%	39.3%
16	Rijeka	HR	128,279	726	0.7%	0.9%	-5.9%	10.3%
17	Poreč	HR	81,375	390	0.5%	0.5%	15.1%	-6.4%
18	Trieste	ITA	64,971	300	0.4%	0.4%	95.8%	0.0%
19	Bar***	MON	35,925	160*	0.2%	0.2%	-8.3%	-3.6%
20	Pula	HR	35,254	153	0.2%	0.2%	45.4%	28.6%
	OTHER FERRY PORTS		71,926	625	0.4%	0.7%	-11.1%	-15.0%
	TOTAL		**17,622,592**	**83,601**	**100%**	**100%**	**3.5%**	**4.6%**

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report. Data provided to Risposte Turismo directly by ports and national institution (Croatian Bureau of Statistics, Hellenic Ports Association, Statistical Office of Montenegro). The table does not include ports that are active only for internal national connections (mainly in Croatia). Notes: (*) where not available, some values (pax. movements or calls) had been estimated according to multi-year dataset or quarter trend; (**) data does not include tourist and small boats; (***) global data for Montenegro but referring only to Bar.

The ferry, hydrofoil and fast catamaran traffic in the Adriatic Sea reached 17.6 million passenger movements (+3.5% on 2015) and more than 83,000 calls (+4.6%) in 2016. The table above lists the first 20 ferry ports with details about their share on total; leadership goes to Split, with more than 4.5 million passengers, about 26% on total, and a +3.0% variation on 2015, followed by the Greek port of Igoumenitsa (2.4 million) and the Croatian port of Zadar (2.3) which is the first port in terms of calls. It should be remembered that this type of traffic has a relevant part that moves from tourist and leisure point of view (in contrast to cruising), in fact many of the routes connect islands and local territories. Also because of this consideration, ferry traffic fluctuates less than cruise one, and that is why the ranking of ports in the table remained substantially the same compared to the previous year.

Map 6] *Map of the main internal passenger transport routes in Croatia*

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

Focusing, on this page, only on the internal national routes in Croatia that link the numerous islands and the mainland, the map to the left shows the main 10 routes, also listed in the table below with volumes of traffic. In 2016, total passenger movements surpassed the 10 million mark, with a growth of about 4% on 2015 and 12% over the last five years. Although dedicated more to transport as such than tourist transport, this traffic should also be taken into consideration, given the great number that year by year have risen.

Table 8] *Main passenger transport routes in Croatia, 2011-2016; variation 2016/11 and 2016/15*

	FERRIES ROUTES	pax 2011	pax 2012	pax 2013	pax 2014	pax 2015	pax 2016	var % 16/11	var % 16/15
A	Zadar/Gaženica - Ošljak - Preko	1,617,167	1,606,123	1,642,286	1,645,921	1,068,266	**992,985**	-38.6%	-7.0%
B	Split - Supetar	1,538,513	1,534,340	1,598,371	1,604,776	1,745,929	**1,881,052**	22.3%	7.7%
C	Valbiska - Merag	769,177	763,515	762,526	806,316	1,025,199	**1,068,453**	38.9%	4.2%
D	Stinica - Mišnjak	655,620	701,912	679,858	683,677	846,193	**804,012**	22.6%	-5.0%
E	Prizna - Žigljen	697,943	673,017	663,556	657,602	766,583	**799,955**	14.6%	4.4%
F	Split - Stari Grad	593,634	601,445	626,472	618,919	671,145	**724,017**	22.0%	7.9%
G	Brestova - Porozina	584,695	568,769	548,486	501,114	545,700	**575,893**	-1.5%	5.5%
H	Orebić - Dominče	477,227	486,225	482,585	496,383	592,237	**667,215**	39.8%	12.7%
I	Biograd - Tkon	448,198	441,862	448,096	447,500	450,875	**454,347**	1.4%	0.8%
M	Drvenik - Sućuraj	272,926	269,728	283,963	293,015	348,294	**363,683**	33.3%	4.4%
	MAIN 10 ROUTES	7,655,100	7,646,936	7,736,199	7,755,223	8,060,421	**8,331,612**	8.8%	3.4%
	OTHER ROUTES	1,486,436	1,502,542	1,535,173	1,595,053	1,791,033	**1,905,334**	28.2%	6.4%
	TOTAL PAX	9,141,536	9,149,478	9,271,372	9,350,276	9,851,454	**10,236,946**	12.0%	3.9%

Source: elaboration based on data provided by Agencija za obalni linijski pomorski promet (Tablice Statistika 2012-2013-2014 and 2015-2016).

Table 9] *Concentration of ferry, hydrofoil and fast catamaran passenger movements in Adriatic ports, 2014- 2016*

Passenger movements	first 3	first 5	first 10
2016	52.5%	67.9%	90.2%
2015	52.7%	70.2%	90.4%
2014	51.0%	66.3%	85.1%

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

The concentration of traffic in the first 3 Adriatic ports remained stable in 2016 on comparison with 2015 (more than half of total passenger movements); stability is shown also for the first 10 ports, while the concentration of the first 5 ports slightly decreased.

Table 10] *Ferry, hydrofoil and fast catamaran passenger movements by country, absolute values and percentage shares, 2016 and variation on 2015*

PORTS	2016*		Share % on total		2015		Variation % on 2015	
Country	Pax. mov.	Calls	Pax. mov.	Calls	Pax. mov.	Calls	Pax. mov.	Calls
CROATIA	8,872,444	47,928	50.3%	57.3%	8,604,949	43,343	3.1%	10.6%
GREECE **	4,586,337	25,272	26.1%	30.2%	4,393,279	25,162	4.4%	0.4%
ITALY **	2,824,858	7,100	16.0%	8.5%	2,783,882	8,348	1.5%	-15.0%
ALBANIA*	1,288,988	2,990	7.3%	3.6%	1,186,017	2,735	8.7%	9.3%
MONTENEGRO*	35,925	160	0.2%	0.2%	39,198	166	-8.3%	-3.6%
SLOVENIA	14,040	151	0.1%	0.2%	11,154	132	25.9%	14.4%
BOSNIA-HERZEGOVINA	0	0	0.0%	0.0%	0	0	n.a.	n.a.
TOTAL	17,622,592	83,601	100%	100%	17,018,479	79,886	3.5%	4.6%

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report. Notes: (*) where not available, some values (pax. movements or calls) were estimated with multi-year dataset trend; (**) for Italy only the Adriatic ports were considered, for Greece only Corfu, Igoumenitsa and Patras.

Focusing the analysis on a regional level, Croatia recorded about half of the total number of passengers and more than 57% of ferry, hydrofoil and fast catamaran calls (this value could be even higher, considering the short internal connections, here above excluded) with figures for both passengers and calls having increased on 2015. The table above shows that almost all the Adriatic countries displayed a growth in this type of traffic, except Montenegro, where for 2017 a suspension of the routes that link Bar (the only Montenegrin ferry port) to Italy is expected, causing the absence of traffic in this country. The most significant growth belongs to Slovenia that recorded 14,000 passengers, followed by Albania with a growth of 8.7%. The overall framework shows a ferry traffic increase in 2016 (3.5% on 2015 in terms of passenger movements and 4.6% of calls).

Table 11] *Main ferry, hydrofoil and fast catamaran ports for international traffic, 2016*

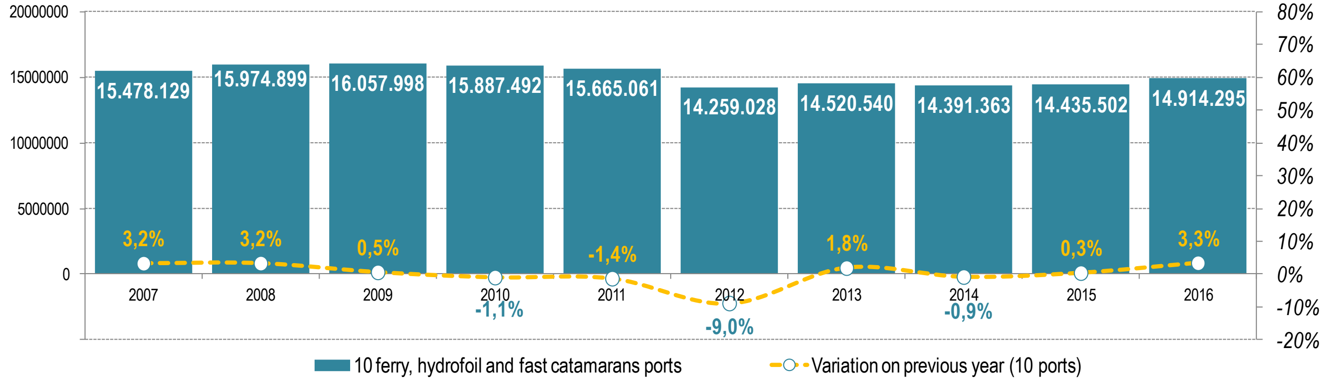
	Port	Country	Passenger movements			
			International	Domestic	Total	International % share on total
1	Bari	ITA	**1,120,713**	0	1,120,713	100.0%
2	Ancona	ITA	**948,436**	1,742	950,178	99.8%
3	Durres	ALB	**839,598**	0	839,598	100.0%
4	Igoumenitsa	GRE	**822,155**	1,604,725	2,426,880	33.9%
5	Brindisi	ITA	**511,678**	0	511,678	100.0%
6	Patras	GRE	**458,329**	118,662	576,991	79.4%
7	Vlore	ALB	**198,079**	0	198,079	100.0%
8	Split*	HR	**194,227**	4,317,740	4,511,967	4.3%
9	Corfu	GRE	**187,823**	1,391,242	1,579,065	11.9%
10	Venice	ITA	**151,764**	0	151,764	100.0%
	TOTAL 10 ports		**5,432,802**	**7,434,111**	**12,866,913**	**42.2%**

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report. Note: (*) data does not include tourist and small boats.

The ferry, hydrofoil and fast catamaran traffic within the Adriatic ports is made up of both international and domestic traffic; in fact some ports are linked only to foreign ports, while others are involved only in domestic routes (especially with the islands). The table above shows the first 10 Adriatic ports by international traffic.
Bari is the first port in the table, with all its passengers moved to/from foreign ports (1.1 million), followed by Ancona (948,000) and Durres (839,000).

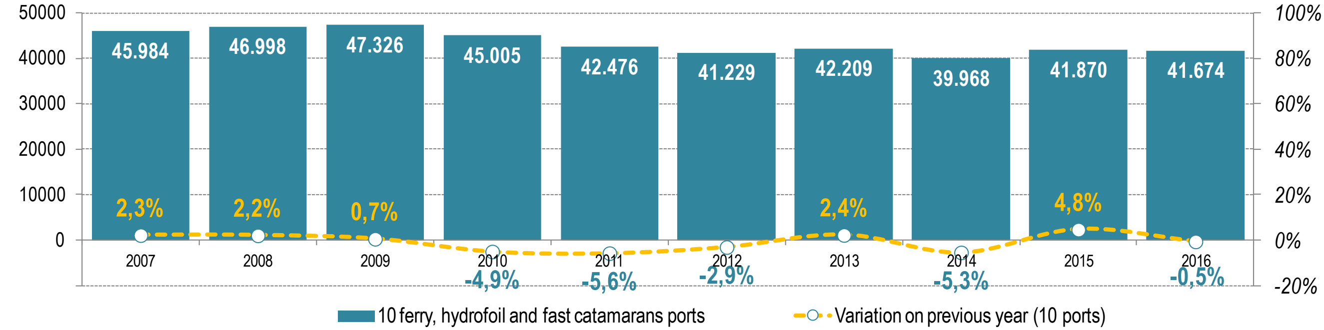
If we take a look at the share of international traffic vs the overall numbers, Split is the port with the lowest share (4.3%) while prevailing domestic traffic, followed by Corfu (11.9%) and Igoumenitsa (33.9%, even at the fourth place in the ranking with more than 820,000 passengers on international routes). Zadar – the third port for overall traffic – is not included in this table since less than 2% of total traffic refers to international routes.

Graph 8] *Trend of ferry, hydrofoil and fast catamaran passenger movements and growth rate in 10 Adriatic ports, 2007-2016*



Source: Risposte Turismo (2017), Adriatic Sea Tourism Report. Note: trend for 10 ports with a complete 10-year dataset (Split, Igoumenitsa, Zadar, Corfu, Bari, Ancona, Durres, Dubrovnik, Brindisi and Venice).

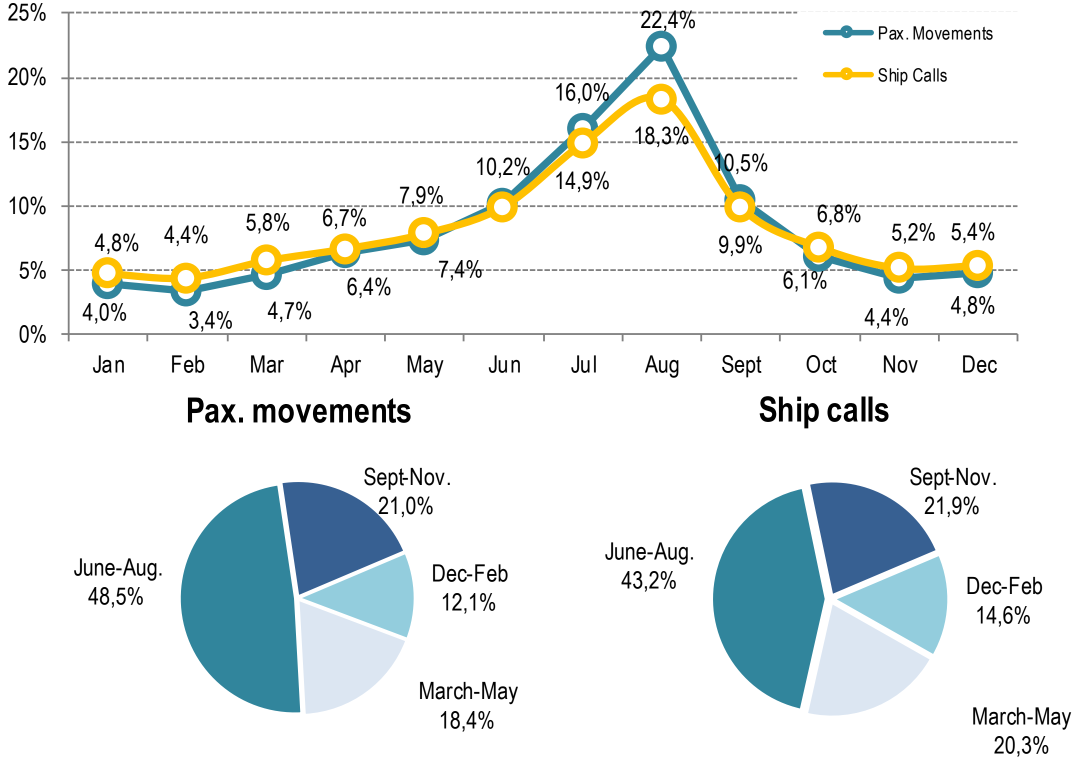
Graph 9] *Trend of ferry, hydrofoil and fast catamaran calls and growth rate in 10 Adriatic ports, 2007-2016*



Source: Risposte Turismo (2017), Adriatic Sea Tourism Report. Note: trend for 10 ports with a complete 10-year dataset (Split, Corfu, Dubrovnik, Sibenik, Bari, Brindisi, Durres, Rijeka, Venice and Pula).

The trend of passenger movements and calls and their respective variations on the previous year have been analyzed for the Adriatic ports with a complete 10-year dataset (from 2007 to 2016): the results show that in 2016 the number of ferry passengers in these 10 ports increased on 2015 with a variation of 3.3%, while calls remained quite stable. In the last decade the passenger movements have fluctuated around the value of 15 million, but the number of calls in the last five years did not reached the values recorded up to 2010 remaining at around 40,000, due to greater ferry ships capacity and higher occupancy rates.

Graphs 10 & 11] *Monthly and trimester shares of ferry, hydrofoil and fast catamaran passenger movements (left pie) and calls (right pie) in the Adriatic ports, 2016*



Source: Risposte Turismo (2017), Adriatic Sea Tourism Report. Note: ports provided seasonality details: Ancona, Bari, Brindisi, Corfu, Dubrovnik, Durres, Igoumenitsa, Korčula, Pesaro, Pescara, Pula, Rijeka, Rovinj, Split, Trieste, Umag, Venice, Zadar.

This type of traffic shows a more pronounced seasonality trend, especially due to routes operating only in summer or in any case during a limited period of the year. The peak of traffic – both in terms of passengers and calls – is in August, when passenger movements reach 22.4% of the total. About half of the passenger traffic is concentrated from June to August, but it is present throughout the year, thanks to a number of some regular connections.

Map 7] *Adriatic ferry, hydrofoil and fast catamaran ports, forecasted variation in some ports*

Forecasting ferry, hydrofoil and fast catamaran traffic remains difficult and problematic for port authorities and terminal operators due to the dynamics of this type of traffic and the approach both of the offer and the demand on comparison with cruise traffic. Difficulties emerge, apparently frequently, regarding the occupancy rates, last minute changes in routes and availability of links.

For 2017, a number of changes in the Northern Adriatic are already underway: a ferry line from/to Greece has moved from Trieste to Venice with 2 ferry ships calling twice a week throughout the year, therefore in Trieste fewer passengers should transit in the port, and Venice should experience an increase in Ro-Pax traffic, especially in terms of passengers and vehicles (rather than trailers and commercial traffic). Remaining in Italy, the port of Pesaro will double the connections with the Croatian islands (about 64 calls) and the port of Otranto should be connected with Corfu during the summer for the first time, while the port of Pescara will not cover the routes from/to Croatia. Ancona and Brindisi expect stability in their own traffic (950,000 and 510,000 respectively). Moving to Croatia, in the port of Rijeka about 130,000 passengers will transit (+1.3% on 2016); Šibenik forecasts 285,000 passengers (+3.2%) and Pula 60,000 (45,000 in international hydrofoils and catamarans and 15,000 in domestic catamarans); positive variations are expected also in Split (+2.0% with 4.6 million of passengers) and Zadar (+1.9% with 2.3 million). In Dubrovnik (550,000 passengers), Poreč (81,000), Rovinj (23,000) and Umag (9,500), stability is forecast (as in the Slovenian port of Piran with 14,000 movements). The Albanian port of Durres expects about 847,000 passengers in 2017 (0.9% on 2016).

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

These indications and forecasts have been provided by ports that represent little more than half of 2016 total traffic (58%). It would therefore not be prudent to apply their expectations to the overall ferry traffic in the Adriatic. In any case, in the light of some positive and negative variations and other stable situations, we consider it reasonable to forecast for 2017 slightly higher traffic on 2016, in terms of passenger movements (around +1.5%) and calls (around +0.3%).

4 SAIL AND YACHT BOAT TRAFFIC

Map 8] *Marinas and small ports in the Adriatic Sea, 2017*

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

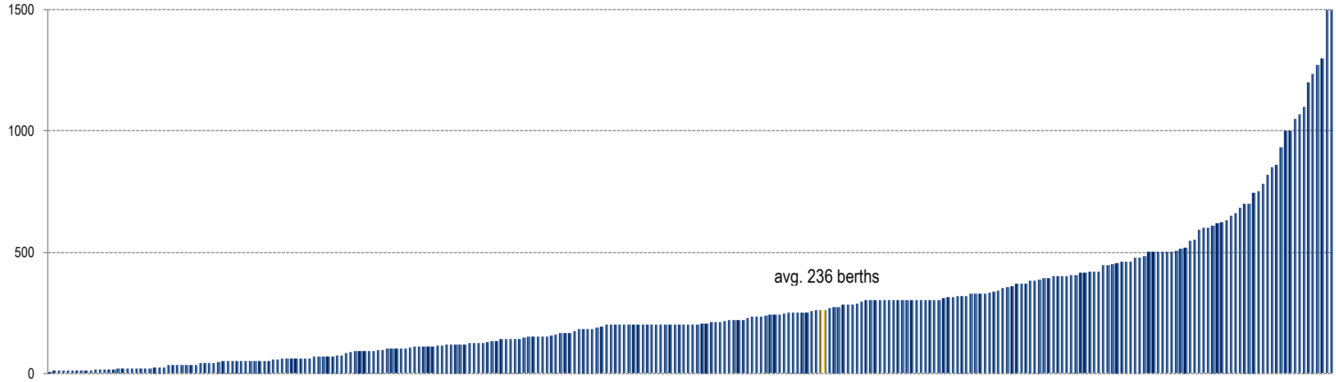
The updated mapping of marinas and small ports dedicated to nautical tourism revealed, over the last few months, more than 330 structures (331), with around 80,000 moorings (78,238) located in the Adriatic area. We note with interest that, even if the number of structures in Slovenia, Montenegro and Greece is lower than in Italy and Croatia, the average number of berths per structure is almost double, with a peak of 564 for Greece. Bosnia Herzegovina remains the only country with access to the Adriatic Sea that has no marinas dedicated to nautical tourism.

Table 12] *Values and shares of berths and structures in Adriatic by country, 2017*

	Berths		Structures		Avg. berths per structure**
	value	% share	value	% share	
ITALY*	48,642	62.2%	188	56.8%	259
CROATIA	20,221	25.8%	122	36.9%	166
SLOVENIA	3,470	4.4%	8	2.4%	434
MONTENEGRO	3,450	4.4%	8	2.4%	431
GREECE*	2,255	2.9%	4	1.2%	564
ALBANIA	200	0.3%	1	0.3%	200
BOSNIA-H.	0	0.0%	0	0.0%	n.a.
TOTAL	**78,238**	**100%**	**331**	**100%**	**236**

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report. Notes: (*) both for Italy and Greece, only their Adriatic ports have been considered; (**) the values are rounded either up or down to whole numbers

Graph 12] *Distribution of the boat structures based on the number of mapped berths (vertical axis), 2017*



Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

The graph above shows the distribution of structures according to number of berths. Visually it is clear that most structures on the Adriatic Sea have less than 400 berths. As listed in table 13, the largest marinas (with more than 400 berths) represent more than half of the total capacity of berths on the Adriatic Sea (53%), although they make up only 19% of the total structures.

Table 13] *Berths and shares of medium–large structures (> 400 berths), by country, 2017*

	Berths		Structure		Share on total*	
	value	% share	value	% share	berths	structure
ITALY**	24,165	58.4%	40	64.6%	31%	12%
CROATIA	9,735	23.5%	14	22.6%	12%	4%
MONTENEGRO	2,809	6.8%	3	4.8%	4%	1%
SLOVENIA**	2,800	6.8%	3	4.8%	4%	1%
GREECE	1,855	4.5%	2	3.2%	2%	1%
TOTAL	**41,364**	**100%**	**62**	**100%**	**53%**	**19%**

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report. Notes: (*) share of medium and large structures on total; (**) both for Italy and Greece, only their Adriatic ports are considered.

Table 14] *Density of boat structures and berths by Adriatic region, 2017*

COUNTRY	REGION	COASTLINE (KM)	BERTH/KM*	KM PER STRUCTURE*
ITALY	Puglia (Adriatic coast)	560	20	10
ITALY	Molise	35	21	18
ITALY	Abruzzo	133	17	22
ITALY	Marche	180	33	13
ITALY	Emilia Romagna	130	53	5
ITALY	Veneto	170	64	4
ITALY	Friuli Venezia Giulia	130	82	3
SLOVENIA	Karst	47	74	6
CROATIA	Istarska	539	9	36
CROATIA	Primorsko-goranska	1,065	2	107
CROATIA	Zadarska	1,082	4	22
CROATIA	Šibensko-kninska	806	6	38
CROATIA	Splitsko-dalmatinska	1,064	3	46
CROATIA	Dubrovačko-neretvanska	1,025	1	542
MONTENEGRO	Montenegro**	294	12	37
ALBANIA	Vlorë	244	1	244
GREECE	Corfu	200	6	200
GREECE	Lefkada	117	5,3	117
GREECE	Epirus	200	2	100

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report. Notes: (*) the values have been rounded either up or down to whole numbers; (**) overall Montenegro coastline. Table does not include some regions without structures, as in Croatia Ličko-senjska county (200km of coastline), in Federation of Bosnia and Herzegovina (23.5km), in Albania Lezhë (38km) and Durrës (62km).

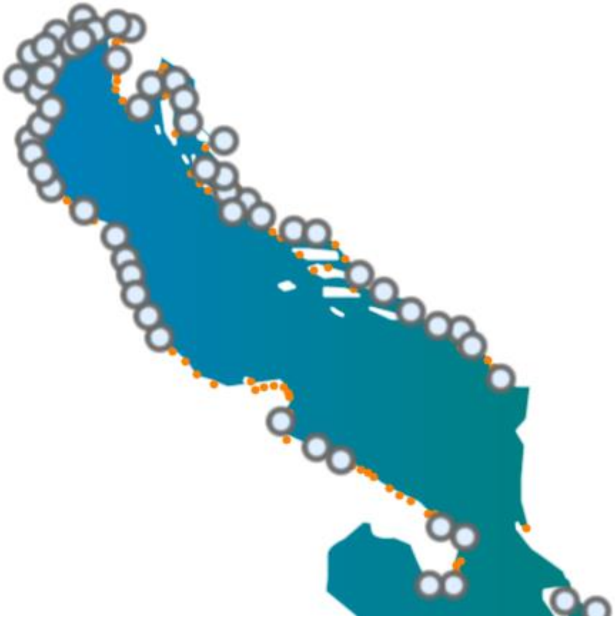
As regards the number of berths per km of coast in the Adriatic, the table shows that Friuli Venezia Giulia can count on 82 berths per km, followed by Karst (74), Veneto (64) and Emilia Romagna (53). Croatia, due to its particular geographical configuration, shows high kilometre-per-structure values. Taking into consideration table 15, it is interesting to note that most berths (55.9%) and structures (58.6%) are located in the Northern part of the Adriatic Sea, that is in one third of the whole area.

Table 15] *Berths, structures and the average of berths by structure in the Adriatic areas, 2017*

	Berths		Structures		Avg. berths* by structure
	value	% share	value	% share	
North	43,698	55.9%	194	58.6%	225
Centre	16,123	20.6%	64	19.3%	252
South	18,417	23.5%	73	22.1%	252
TOTAL	**78,238**	**100%**	**331**	**100%**	**236**

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report. (**) Values are rounded either up or down to whole numbers

Map 9] *The sample of marinas collaborating at 2017 edition of ASTR*



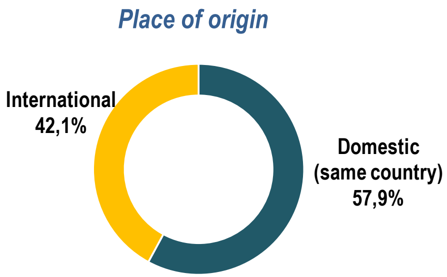
The sample of 65 structures that took part in the survey this year can count on almost 22,000 moorings, with 726 permanent employees in addition to 203 seasonal employees during the tourist season.

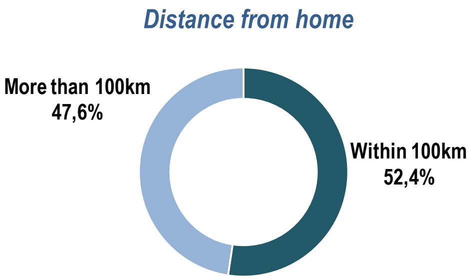
It is a particularly heterogeneous sample, comprising both marinas geared towards an international clientele (42.1%), and marinas offering their services in almost the same way to a domestic or nearby resident market (more than half of their clientele being located within 100km from the structure).

97% of the surveyed marinas have an annual opening period, while only 3% have a seasonal opening period.

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

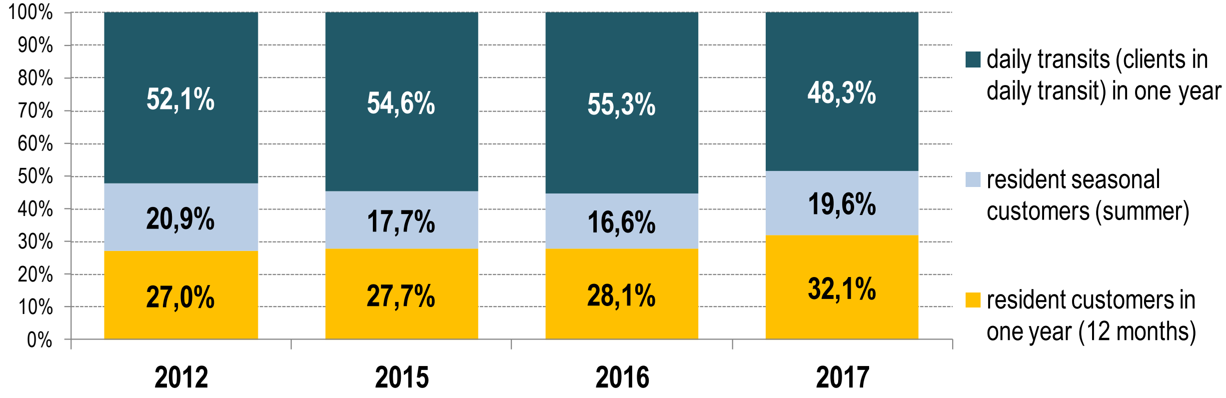
Graphs 13] *Comparison by place of origin of clients of the sample of marinas, 2017*





Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

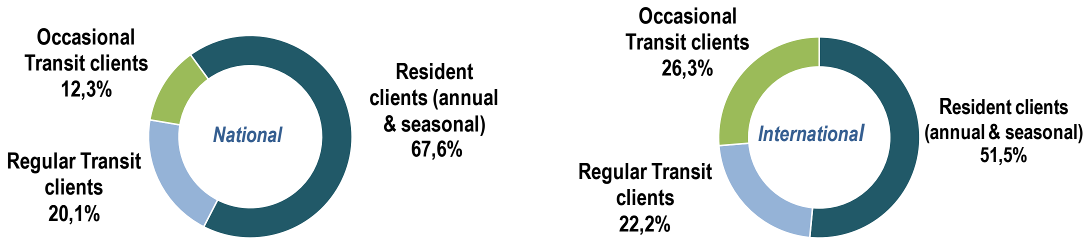
Graph 14] *Distribution of the type of clients of the sample of marinas, 2012, 2015, 2016 and forecasts, 2017*



Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

As highlighted in each of the previous editions, daily transits – meaning clients who use the boat structure facilities for only one day during the season – continue to represent the majority of demand for the sample of surveyed marinas, confirming a marked phenomenon of boat movements and trips on the Adriatic. It is also interesting to note the upswing of the resident customers data, that, since 2012, has increased continuously.

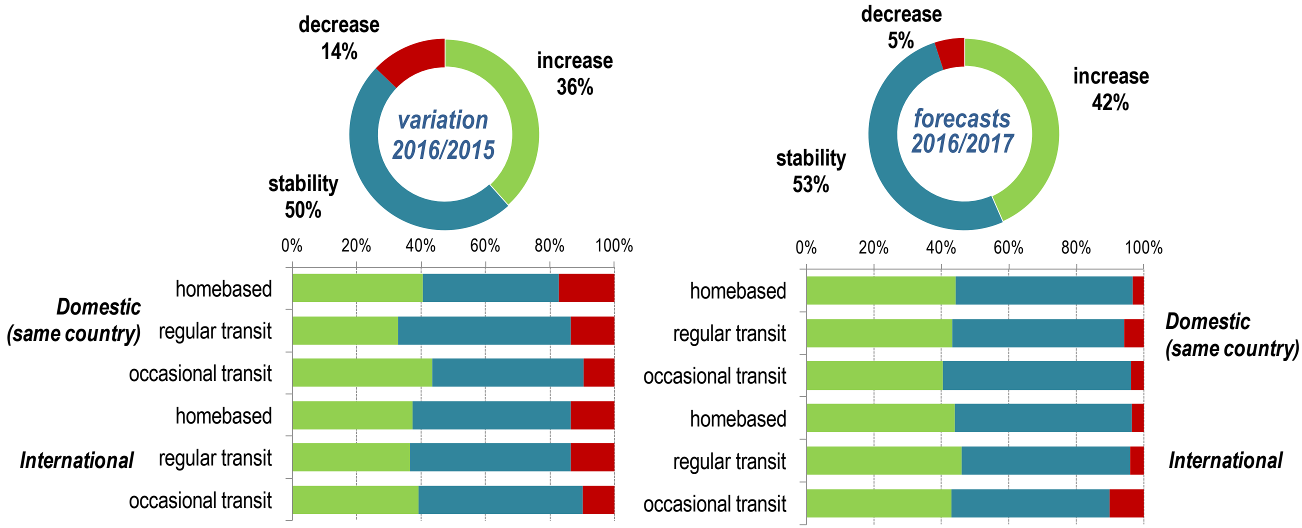
Graphs 15] *Distribution of customers of the sample of marinas by type and origin (national or international), 2016*



Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

National customers of marinas are mainly resident clients (67.6%). The share of occasional and regular (more than once during the season) transit clients for the international demand is higher.

Graphs 16] *Variations in domestic and international clientele of interviewed marinas, 2016/2015 and forecasts, 2017*



Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

A positive outlook for nautical tourism is what we deduced from the 2016/2015 variation. Only 14% of the respondents recorded a decrease, in particular in *homebased* domestic clientele.
The right graphs above show also a quite positive forecasting for the 2017 season: while most of the surveyed marinas (53%) are not expecting a clientele variation during this year, few, 5%, expect a decrease. This is due to 42% of the respondents who interestingly declared that they are expecting higher numbers of clients this season. An increase should be noted for all forms of clientele, with the highest decrease apparently to be expected from the international occasional transits.

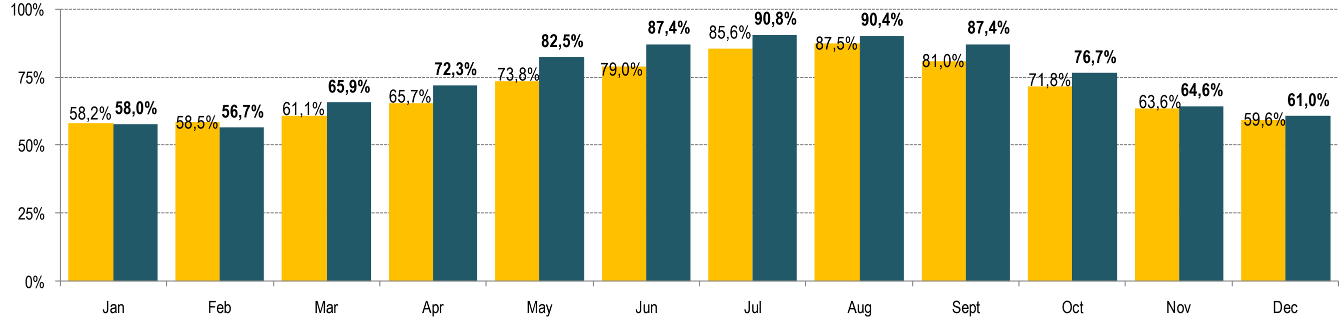
Table 16] *Number of annual and seasonal clients and daily calls of the sample, mean values and variations 2012, 2015, 2016 and forecasts 2017*

	mean values				variations		
	2012	2015	2016	2017	16 on 12	16 on 15	17 on 16
Annual clients	741	729	738	774	-0.37%	-2.77%	4.89%
Seasonal clients	657	579	526	585	-19.94%	-9.25%	11.35%
Calls	1,689	1,789	1,682	1,544	-0.22%	-5.94%	-8.22%

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

Since the first edition, the Adriatic Sea Tourism Report has continued to collect information relating to the dimension of the market. The table above shows the total number of clients in the sample - both annual and seasonal (as well as boats in daily transit) - in order to start defining a map of nautical tourism movements in the Adriatic. After a small year-on-year decline in 2016, the surveyed marinas expect, for 2017, a growth in terms of annual and seasonal clients that should lead to the higher number of annual clients and seasonal clients for the 2015-2017 period.

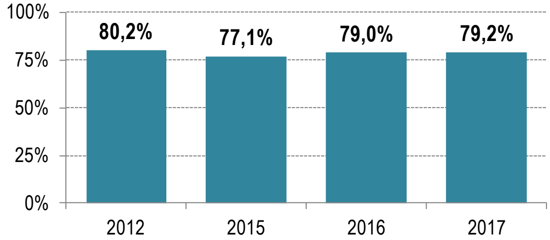
Graph 17] *Monthly occupancy rates forecasts in interviewed marinas, 2017 vs. 2016*



Source: Risposte Turismo (2017), Adriatic Sea Tourism Report and 2016 edition (for 2015 data).

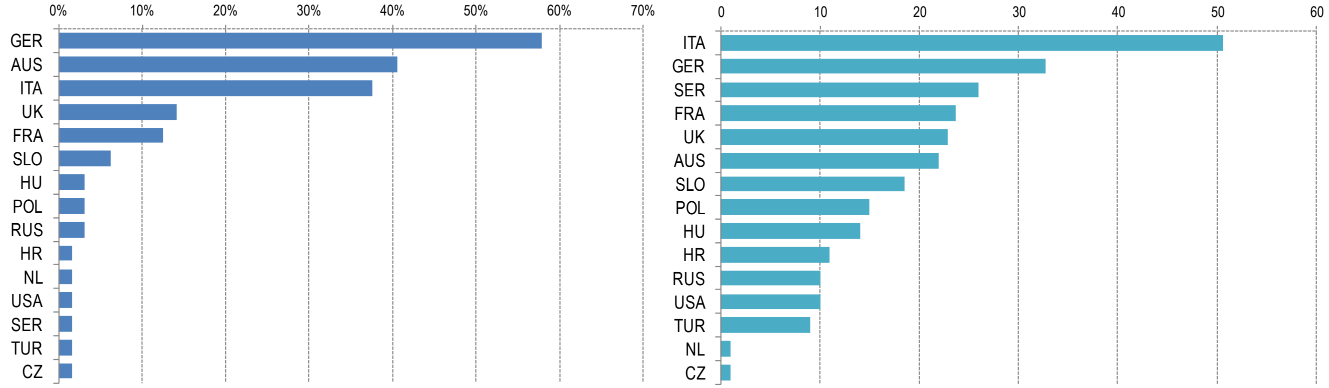
The comparison between 2017 (yellow) and 2016 (blue) in graph 24 shows that the average values for occupancy rates per month slightly decrease almost every month, that is, excepting during January and February. On graph 25, the occupancy trend for 2012, 2015, 2016 and 2017, shows that the highest value was reached in 2012 (80.2%).

Graph 18] *Trend of occupancy rates in interviewed marinas 2012, 2015, 2016 and forecasts 2017*



Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

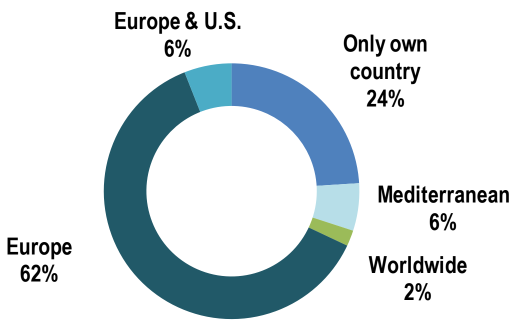
Graph 19]. *Origin countries of the customers of interviewed marinas and their relative percentage on the overall customers, 2017*



Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

The marinas were asked to reveal their clients' main origin countries and their relative percentage on overall customers. The results show mainly markets near the Adriatic area but also some less obvious ones, like Turkey or Czech Republic. Almost 60% of the companies in the sample cited Germany. The graph on the right represents the average values of the percentages that the marinas declared. The two graphs show some differences as to how many times a given country has been cited and its weight on total clientele of the surveyed marinas, e.g. Austria has been cited by 40% of marinas (left graph) but the average weight is around 22% (right graph). The U.K. has not been frequently cited by the surveyed marinas (about 14%). However, it has a markedly consistent presence and weight.

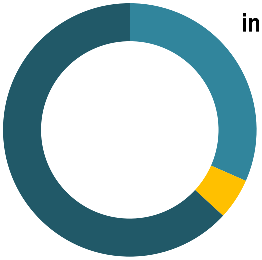
Graph 20] *Areas of promotion for the surveyed marinas activity, 2017*



Graph 20 shows the areas where the surveyed marinas promote their activity. Most of the focus is on the European area, with a small part on Europe and U.S. Only 2% conduct promotion worldwide.

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

Graph 21] *Marinas tariffs variation expected for 2017*



Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

As regards the prices applied, most of the surveyed marinas (63%) will not apply tariff changes this year. Only 5% will lower the prices. Moreover, we surveyed the average prices for:

- 3 days in May with 6 passengers on board, 15 mt boat: 226€;
- 3 days in August with 4 passengers on board, 7 mt boat: 105€.

INVESTMENTS OF MARINAS

In the last two years in Italy some new structures began their activity. In particular, in the Venice area two new marinas have been opened: *Marina di Sant'Elena*, with 150 berths and *Marina Certosa – Vento di Venezia*, with 400 berths. The Port of Otranto enlarged its capacity with a 200 berths inner dock. Over the next two years, some new openings are planned: in particular, in the Veneto area *darsena Alberoni* (100 berths) and *Porto Caleri* marina (550 berths). Also in Abruzzo, a new opening is planned: the new *Francavilla a Mare* port, with 250 berths. In Puglia a 500 berths tourist harbour shall be launched in Otranto in 2019. As regards the closed marinas, in Vallugola (Rimini) the 150 berths tourist port ceased its activity owing to financial problems.

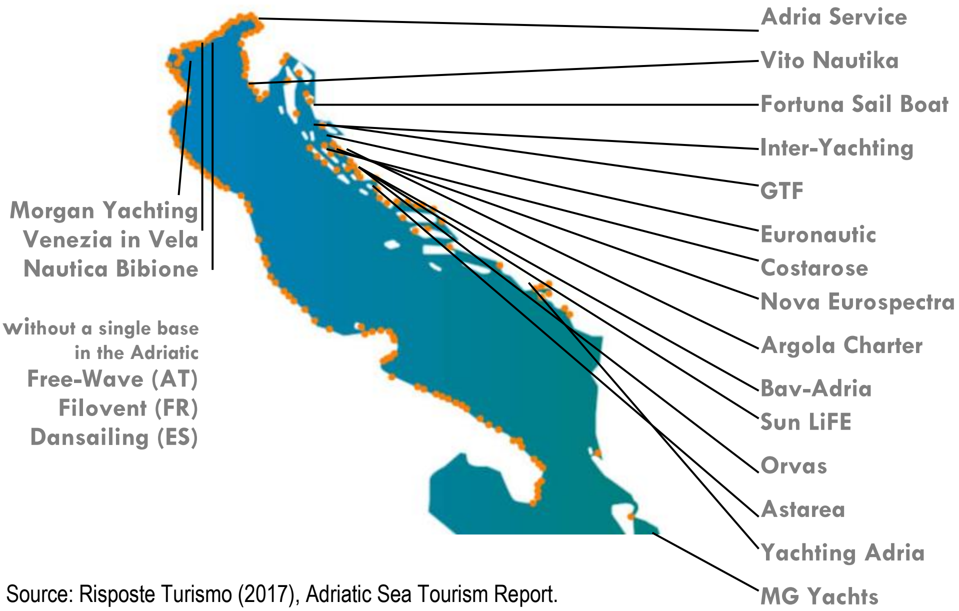
Continuing along the Adriatic coast, while Slovenia is not expected to enlarge its berth capacity, Croatia is shall increase its offering. The *ACI Marina "Veljko Barbieri"* in Slano was opened in summer 2015 providing Croatia with 200 berths more. On the other hand, *ACI Marina Rovinj* (447 berths) will be closed until summer 2018 for extension works. In the next two years, some new launches are planned also in Croatia: in particular, in late 2017 *Marina Muroskva*, in the Kvarner County with 170 berths and the *Port Podbaran Marina* (250 berths).

In 2018, the new *Marina Gruz* (220 berths)will be opened in Dubrovnik. As regards Montenegro, the opening of *Portonovi Marina Hotel* in Kotor (238 berths) is planned for late summer 2017.

Considering both the on-going and the planned works for the next two years (2018-2019), the Adriatic Sea will increase its offer with 2,700 berths in 9 marinas. According to the gathered info the total investment is around 100M euro. Taking into consideration only the 3 year period (2015-2017) work in progress and programmed openings within the end of this year, the investments is more than 50 million euro. One of these marinas is part of a larger 500 million euro investment for the construction of a luxury resort in the Bay of Kotor.

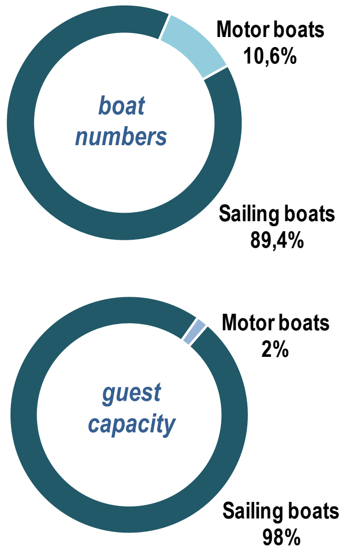
Beside investments, some news come from the management front. In 2016, a new network of marinas has born in Italy: 12 marinas in the Friuli Venezia Giulia region have been gathered under the *Rete delle Marine del Friuli* (Friuli Marinas Network). The network was born thanks to the desire of nautical structures to jointly promote the activities of the marinas.

Map 10] *The sample of charter companies collaborating at 2017 edition of ASTR*



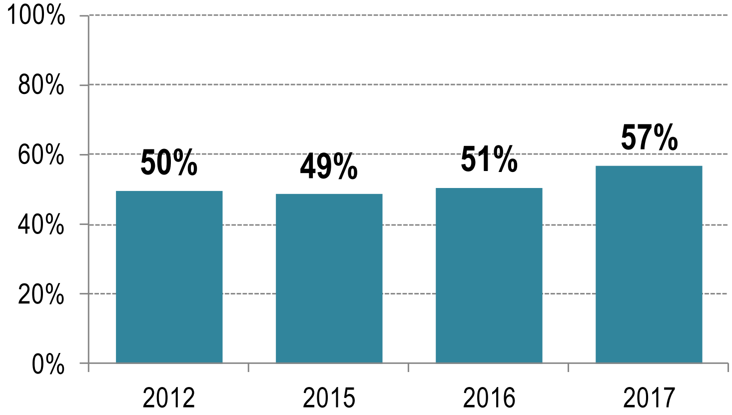
Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

Graphs 22] *Typology of boats in the sample fleet*



The sample of charter companies of the Adriatic Sea Tourism Report 2017 is composed of 24 different organisations located in Italy, Slovenia, Croatia, Montenegro and Greece. Of the total amount of fleets, 89% are sailing boats concerns and only 11% motorboats concerns, while, as regards guest capacity, the gap is even greater: 98% sailing boat guests and only 2% motorboat guests.
Most companies (87.5%) have their nautical bases on the East coast of the Adriatic Sea. More specifically, 58.3% of the bases are located in the central part of the Eastern coast.
On average, 6 fixed term people are employed permanently by the charter companies. In addiction, 6 seasonal workers are employed during tourist season.
Almost half (46%) of the surveyed companies declared that they promoted their activity worldwide but the focus on European market still remains fundamental (42%) with a minority that promotes its product solely on a national level (12%).

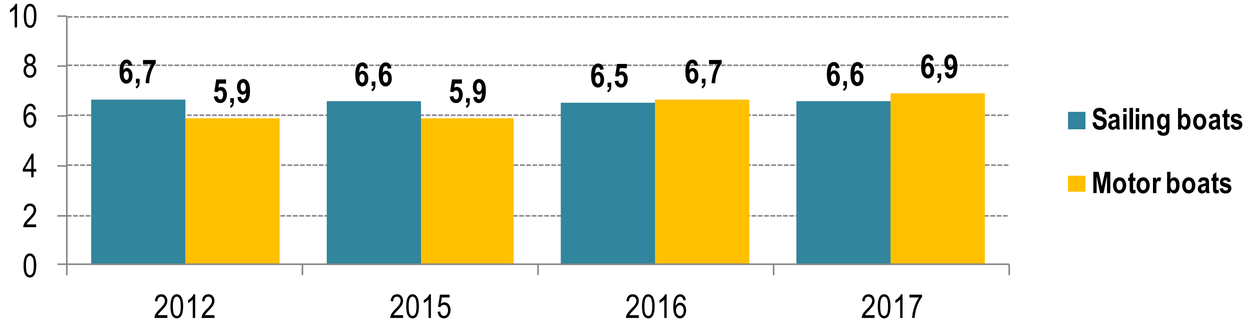
Graph 23] *Booking rates for boats of the sample charter companies fleets in 2012 and 2015-2017*



Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

Booking rates as for sailing boats and for motorboats remained very stable between 2012 and 2016 (between 49% and 51%), but the estimates for 2017 are slightly more optimistic (57%). If the estimates are confirmed, 2017 will be the best year for booking rates since 2012.

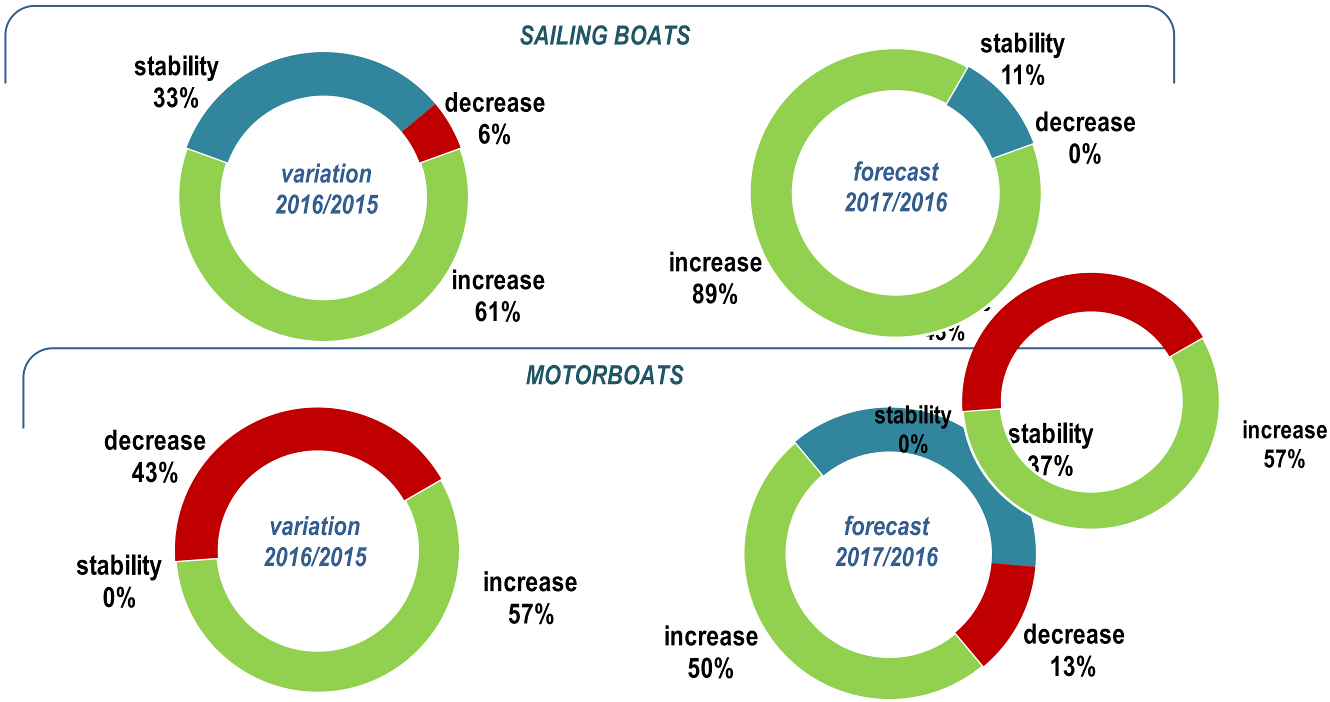
Graph 24] *Average duration of bookings for sailing and motorboat clients of the sample charter companies in 2012 and 2015-2017*



Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

In 2016 the average duration of bookings for motorboats and for sailing boats remained more or less the same (6.7 and 6.5 days), similarly to the years 2012 and 2015 when the percentage for sailing boats was slightly higher. The estimate for 2017 is even more optimistic: 6.6 for sailing boats and 6.9 days for motorboats, confirming the tendency toward a longer duration of bookings for motorboats.

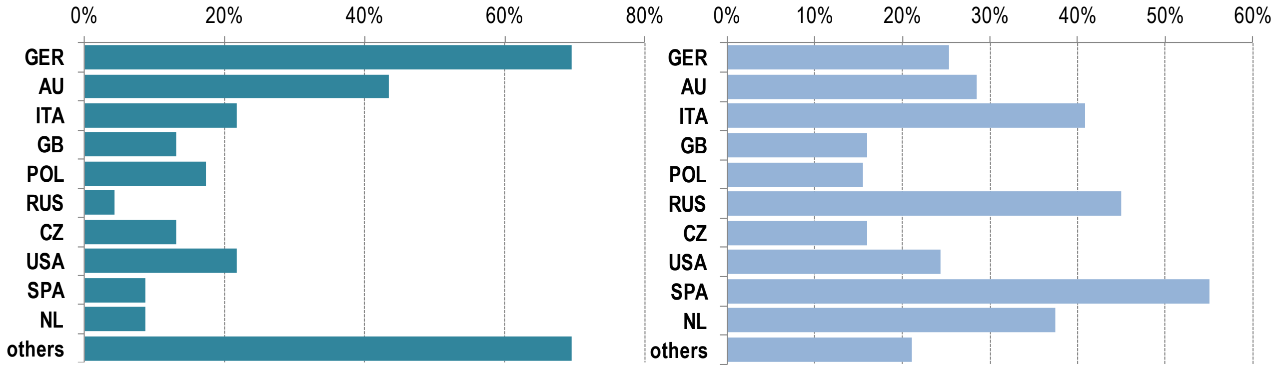
Graphs 25] *Variations in clientele of interviewed charter companies per type of boat, 2016/2015 and forecasts 2017/2016*



Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

The information from the graphs above is particularly surprising: the shares of increase in clientele are all higher than 50% in 2016, and this very positive vision is also confirmed for 2017.
The increase in clientele for sailing boats and motorboats was very similar in 2016 (61% for sailing boats and 57% for motorboats) but while sailing boats remained mostly stable (33%) and only 6% decreased, motorboats showed a marked 43% decrease. The forecasts for 2017 appear to be more positive than the 2016 data: the decrease could be very small for motorboats (just 13%) and sailing boats may even have no real decrease in acquisition of clientele and just 11% stability. In all the graphs, neither stability nor decreases are noted for more than 50% of the share: increases in clientele always exceed 50%, with the exception of motorboat forecasts for 2017, where increase and stability values are very close (50% and 37%). The graphs present an encouraging scenario especially for sailing boats, but also for motorboat rentals there will be no real reduction in clientele.

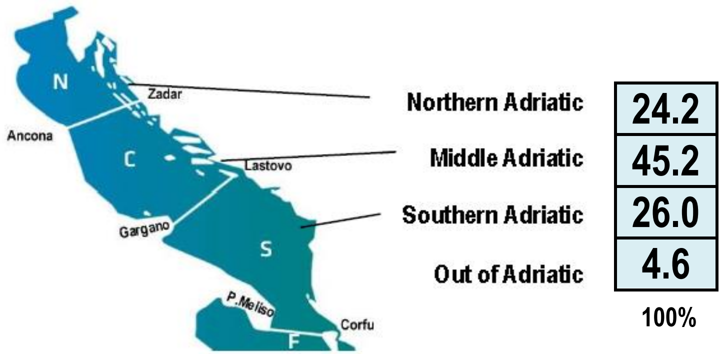
Graphs 26] *Origin countries of the customers of interviewed charter companies and their relative percentage on the overall customers, 2016*



Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

Charter companies were asked to state the country of origin of their main clients and their percentage on overall customers. The graph shows that the German tourists were the most cited (70%) followed by Austrians, Italians and Americans (respectively 43%, 22% and 22%). The Russian market shows a better performance in comparison to the previous years thanks to some companies that are specialized in that particular market. In addition to the Russian market also Spanish, Italian and Dutch markets seem to be served by only few specialized companies for which they constitute the 55%, 41% and 38% of the total clientele.

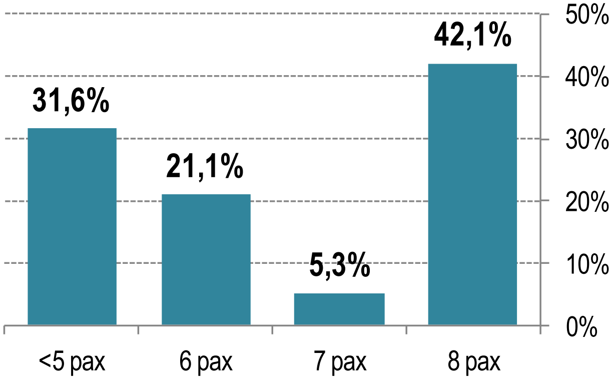
Map 11] *The distribution of the itineraries chosen by the charter companies customers among the 4 areas of the Adriatic Sea, 2016*



Most of the charter companies' clientele prefers to sail in the Middle Adriatic, particularly in the area of Split and Zadar (45.2%). The Southern Adriatic has a higher percentage than the Northern Adriatic (26% on 24.2%) with a lower percentage of companies that operate mainly outside the Adriatic (4.6%).

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

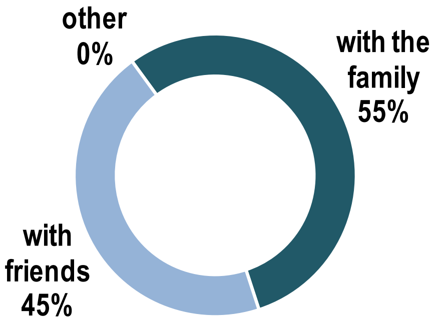
Graph 27] *Most frequent occupancy of the boats of the sample charter companies, 2016*



Looking at the data about the most frequent occupancy of the charter companies, it may be noted that the range of the answers goes from a minimum of 4 passengers to a maximum of 12 passengers, depending on the size of the boat. The most frequent occupancy has been of 8 people, very much higher than the percentage for 7 people.

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

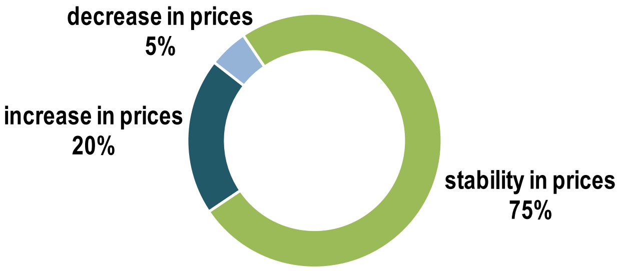
Graph 28] *General composition of the travel client groups of the sample charter companies, 2016*



To gain a better understanding of the main target clients of the charter companies we proposed a division into three groups: family, friends and other combinations. The percentage shows slightly more people with their families than people who come with their friends (55% and 45%). It may be noted that the absolute majority of the respondents declared that their customers do not require a skipper (74%).

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

Graph 29] *Intentions of charter companies to modify tariffs in 2017*



A marked majority of the respondents will leave the prices unvaried for the next season (75%) while just 5% of the companies will reduce their prices. Increases in prices will regard 20% of the surveyed companies.

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

Table 17] *Average cost of some particular offer combinations, 2017*

	Sailing boats	Motorboats
6 people, 15 mt boat for 3 days in May, skipper included	1,683 €	2,214 €
4 people, 7 mt boat for 3 days in August, skipper included	1,466 €	1,060 €

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

For this edition of the survey, queries were included for the first time about the prices and tariffs of charter companies: the companies indicated the tariffs for 3 days' charter with two examples of size of boats (both for sailing boats and motorboats) in two different periods and seasons during the year (in May and August). The results are shown in the table above.

5 WORKING TOWARD DEVELOPMENT OF THE ADRIATIC: THE STAKEHOLDERS' VIEW

The starting point for the ASF project as a whole lies in our company belief that, from the point of view of organising and fostering the tourism offer, the Adriatic Sea deserves more attention and commitment. Efforts should aim to, from the quali-quantitative angle, improve on the results achieved to date – with potential benefits for nations as a whole, local communities, companies and individual operators. This conviction should translate into an ambitious project capable of pooling not just good intentions but also the commitment and action of tourism-industry operators and other players and organisations.

Compared to other phenomena and sectors, maritime tourism – and its components – might emerge as the major driver and protagonist of such developments and potential outcomes, namely a stronger Adriatic from the tourism angle. In terms of tourism demand, notable drawing power is exerted by the wealth of assets of the many towns, cities and so forth that look over the Adriatic Sea. We note assets of natural-history interest, landscapes and sights and locations of historical, artistic and architectural interest, not to mention the bustling social and cultural life of the various peoples of the area. However, the true common denominator for this large variegated zone – with all its exuberance – is its expanse of water. The various maritime tourism solutions may therefore became the symbolic focal point and the strength to promote the area. A promotion that shall also benefit the rich tourism offer to be found in the coastal districts themselves, and their hinterlands.

On the occasion of publication of the fifth edition of ASTR, as a research group we wanted to interface with a number of professional stakeholders endowed with experience and vision. In their respective capacities, these stakeholders contribute to the dynamics of Adriatic maritime tourism. We wanted to consider their various viewpoints, listen to possible propositions and consider criticalities, to understand whether there was a shared stance or whether opinions diverged in regard to various issues and aspects. To this end, we asked some simple questions. Although the responses might justify hours and hours of reflection, our task for the time being was to provide only a summary account. In the notes and pages that follow we present our findings and the opinions currently prevailing as regards the issues raised. We include these responses and viewpoints without ascribing them to any given individual interlocutor.

It is a widely shared opinion that the Adriatic is not recognised at present as a brand, logo or name capable of immediately evoking a set of values, or propositions or opportunities for visiting and discovering localities. As opposed to this marked consensus, differences of opinion re-emerge when we pass on from brand concept to the concept of destination, the latter very frequently defined in geographic terms (and thus a response more to the question "where is it?" than to "what does it offer?"). Some operators are convinced the Adriatic is a destination, while others firmly believe that, actually, it is the "container" of other more specific destinations already well known – such as Venice and Dubrovnik (to name but two localities). Furthermore, many operators reckon that possible perceptions vary according to the profiles of individuals. As to the very idea of what the Adriatic is, tourists may see it (the Adriatic) as an entity whose sense is distinct or, conversely, indistinct. This is due to their own specific cultural profiles, geographic origins or manner of holidaymaking (for the cruise tourism sector and for the boating sector, the identity of the Adriatic may indeed differ). In any case, divergences will emerge. Maritime tourism operators and tourism operators in general in the Adriatic may also be rather undecided as to the question of a unitary approach to management and promotion of this "piece of the Mediterranean". Indeed, they may not believe there is such a thing as a unitary approach.

However, opinions converge once more over the fact that the Adriatic (with its various eastern, western, northern and southern zones) does merit a project that is capable of ascribing to the area as a whole a real identity as a destination. This would be done by turning to best account both the common characteristics and the differences, with a view to constructing – or, rather, systematically reshaping (since it already exists and does not have to be created) – a global offer that is not only composite but also markedly distinct as an entity, that identifies with, and finds expression in, a brand. This brand, of course, must not be the aim of such a project as this. It is only a symbolic synthesis or an element that may be propitious, if, as is hoped, it consolidates and gains a foothold for itself in people's awareness, namely as a filter (together with many other factors both quantitative and qualitative in nature) – a filter by means of which we can assess the success of this hypothesised path.

There is an awareness that, up to the present time, no one has embarked, however tentatively, on an initiative such as this. However, the work put in by the EU, with its EUSAIR strategy, for example – or certain cross-border cooperation programmes – might function as a facilitator for such a welcome initiative as this.

Various causes may be pointed to. However, the generally accepted view is that – among nations, regions or cities and suchlike entities – there is a lack of will to work together. These various players prefer to dedicate their energies to promoting their own local interests, thus pointing more to a scenario of internal competition within the area of the Adriatic as a whole, than to a one in which the team spirit will prevail. Even in the presence of a shared-commitment project, this internal competition would remain. Indeed, it would spur us on to 'go the extra mile'. However, such competition might emerge on a secondary level or tier, with the primary level consisting instead in construction of a shared identity as a destination, and in a strategy to affirm and promote that identity. The target of this latter strategy, in particular, would be the more distant markets (extra-European and represented by European countries lying at some distance from the Adriatic).

When our concern is how we must compete in an international scenario, it goes without saying that many distinctions must be made, in terms of the products, targets, objectives and so forth. The impression we gain on listening to professional players therefore undeniably underscores a shared intention – or at least a shared idea – pointing toward jointly promoting the Adriatic and toward the kind of recognisability (also as name/brand) that other zones and expanses of water (such as the Baltic, Caribbean and Red Sea) have obtained over time. Such promotion may exploit the fame and renown of certain destinations in this area but should also go beyond this limited ambit, and foster a broader and more adequately articulated tourism offer. Furthermore, all players acknowledge the fact that, in this area, the various countries, regions and towns present characteristics thanks to which it would appear reasonable (if not mandatory) to promote themselves individually. The core issue, then, concerns, on the one hand, establishing what can and should be done centrally – thus clarifying objectives, processes, backup investments and responsibilities – in order to further Adriatic coordination, and, on the other, establishing what can and should be done locally. In any case, since there is currently no central governance entity, or at least no central promotional entity, quite a few difficulties would emerge. Probably – even if we decide not to rank the need for superstructures as our top priority – some attention should be paid to this question. At a later stage, the components of maritime tourism and the differences among targets (in terms of places of origin and reasons for travelling and holidaymaking) shall clarify how far we can go in the direction of attempting to get all parties to work together to augment the strengths of the Adriatic and its tourism offer, without in any way nullifying or limiting local activities (whether already under way or prospective).

When the question concerned the advantages of the Adriatic and which of these advantages might represent competitiveness factors that would successfully attract an international tourism demand – demand for the area, as opposed to for individual countries or localities – there was absolute consensus as to Adriatic's beauty, wealth of assets and quality. Some underscored the history, spanning millennia, shared by these lands and their peoples. Others pointed to the vicissitudes and transformations of hundreds of years that have produced the Adriatic as we see it today. We find a history that proceeds from Ancient Greece and Rome, and Byzantium, to the founding of City-States – a narrative bound to arouse curiosity and generate demand if the presentation and promotion work is appropriate, with the focus on the area itself within which all these events took place (namely, the Adriatic Sea; and, that is, as opposed to the various towns, cities and so forth, considered singly).

In equal measure, many of the responses emphasised the wealth of landscapes and assets of naturalistic interest, whether of the sea (many pointed to how clean the sea is in much of the Adriatic) or of the coastline and adjoining hinterlands. Richness and proximity seem to be two relevant strengths which may drive promotion of the whole area, ideal for favouring travel experiences that are as varied as they are comfortable. And then there is the climate (with also the water conditions at sea), which (above all in the southernmost portion) is a significant strength throughout the year (which might, by the way, provide a solution for visitors on the lookout for alternatives to the Red Sea, in the light of the social and political instability of that area). Indeed, personal safety – a further issue raised by the responders, as professionals – is an element of crucial importance nowadays, and one borne in mind by international tourists when looking through their options. We note the presence of international tourists from various markets, and the fact that the Adriatic is just round the corner from certain significant source markets (Germany, Austria, Northern Italy, not to mention the United Kingdom). We note also the satisfactory (albeit improvable) transport network and a network of air, rail and ferry traffic links (for which more efforts are required also in the field of promotion – apparently missing at present). Thanks to these factors, we can look to a catchment area with great potentials, which can then be augmented by attempting – ambitiously, but also feasibly – to reach out and generate demand from other continents.

The infrastructures and services side was also stressed as a competitive advantage: a good supply of marinas and ports for cruisers and ferries, enabling an abundance of solutions close to hand (benefitting shipping companies, from the point of view of planning, as well as tourists who are considering sailing or motor boats trips). The mean level of quality of these ports and marinas and the impressive array of services on offer have also been highlighted. Along the coastlines, too, we registered comments around a satisfactory situation in terms of services, both in quantitative and qualitative terms, representing a logistical solution favouring combined onshore and offshore experiences. On this point, the professionals consulted were keen to point out how much could be done to promote and to bring people into contact with a number of the area's 'gems', so to speak (that even today remain practically unexplored). These locations include islands (stunning locations, in truly abundant supply) and hinterland settlements (complementing the tourism offer represented by the more well-known old, historic town and city centres), not to mention wines and gastronomic treats, marine wildlife parks, the many stretches of coastline that have not yet been developed, and former military and industrial zones to be converted, reclaimed and exploited.

The Adriatic, therefore, presents as an area well stocked with resources that could form the centre-piece of a well-designed, jointly organised promotional action. Considered singly, these resources are already capable of generating demand. Combined, they could be successfully deployed to promote the Adriatic as a destination and, as such, ensure that at least it fully becomes a part of the mindset of tourism sector operators and tourists alike. The variety of locations of cultural and historic interest, and the landscapes, not only generate a catchment area of potentially enormous proportions; they also predispose tourists to making return visits to this part of Europe – and, on each return journey, these visitors will choose from any number of holidaymaking solutions on offer.

When the focus is shifted to what's missing as regards the area, or to where greater commitment is required to bring about a change of direction for the Adriatic – and for its inhabitants and others with roles there – most respondents point to limited dialogue and a limited propensity for engagement and collaboration among the various governmental and administrative bodies: a limited propensity, in part, also noted among private players. Given this obstacle – and in view also of a certain lack of interest – unity of vision and, at least in part, of action is undermined. Without this unity, from the tourism-industry angle, there shall be no growth in the area. Many believe that, if the area is to at last take its place alongside others as a component part of the geography of world tourism, the task of creating a shared path toward promoting the Adriatic should be prioritized. This path seems to necessitate various tools, among which the creation of a single source of information (information ranging from transport links and connections, accommodation and catering structures, titbits of historical interest for excursionists, and so forth). This source should be capable of providing potential tourists with an idea of what they might find if they decide to come to the Adriatic on holiday. The task of running this project should be delegated to an independent player, as facilitator of a process of pooling various resources, ideas and solutions.

A further aspect that was frequently mentioned concerned infrastructures providing links for accessibility (for incoming visitors) and for mobility within the area itself (particularly as regards East-West movements). Many operators believe port infrastructures (irrespective of type of traffic) should be improved, alongside improved services for ships. Nautical charter activities might (and indeed should) find conditions conducive to greater development in the area. A further aspect considered a drawback (which should in some way be put behind us) concerns the mass of red tape and tax rules encountered by users – end customers and operators alike – as a result of which these various players are less likely to see the area as a single entity. The area is a single entity, but people still tend not to see it that way – and, accordingly, it is not likely to be promoted as such. Some ascribe this lack of commitment also to a certain reluctance on the part of leading players from localities that are comparatively more recognisable and more attractive.

Much attention was also paid to the question of providing environmental safeguards for the Adriatic Sea, and also safeguards for sights of historical and architectural interest, and for certain instances of excellence, such as Venice and Dubrovnik (to name but two). Indeed, some players consider this the top priority, and a field that should see greater investment. It has also been pointed out that it may be opportune to have a new authority with the power to regulate marine traffic in the area, once again in order to prevent naturally occurring damage, if not disasters, and overcrowding in some places.

To round off, respondents were asked who should handle such a project as this, paving the way to construction of a single destination with its own brand, entailing promotional activities. Most respondents agreed that the first step should see the involvement of a consortium (or some other form of coordination) made up of the governments of each country and the local governments of the various regions. This conclusion arose out of various considerations, institutional in nature and regarding representation and aspects over which the private sector has no mandate. Furthermore, a key consideration concerns the resources to be earmarked for this common commitment. Involving private players as a source of funding presents problems, and it seems more reasonable look to the public sector. Both operatively, for the purposes of common action, and in order to fund some of the first steps toward achieving this ambitious end, EU programmes and calls for tenders may provide a solution.

However, some see as a more satisfactory solution an independent – and structurally and operationally lean – structure equidistant from all centres of power. It goes without saying that the operator must have the required qualifications as a player accredited in the eyes of all parties joining the Adriatic system for enhancement (followed by promotion) of the maritime tourism offer. Alongside the structure and the project as such, the thinking that goes into it must be resilient, credible and able not just to generate interest but also attract contributions. As to the question of resources, here too, the general view is that the governments of each country, or their national tourism bodies, should earmark part of their budgets to starting up this joint promotional process. Investments from private players might be forthcoming – conditional, however, upon fuller convergence between commitments and outcomes.

Other views that emerged looked at the possible roles of Chambers of Commerce, municipalities, counties, districts, regions – as opposed to central governments – and ports, or the roles of already existing and operational cross-border consortia and associations (despite the fact that many of these latter parties focus on given segments of maritime tourism or on a specific aspect or fields potentially open to development).

All agree that it will be very hard to find a feasible solution that might efficaciously and concretely bring about this commonly held desideratum, namely implementing steps toward the Adriatic Sea's emergence as an international tourism destination of excellence, while working toward results (economic, social, environmental and regarding employment) that are increasingly stable, satisfactory and thus defensible and sustainable. Concomitant with this process of implementation is the realization that there is no other way. Indeed, we must rule out the idea that steps such as these can't be implemented solely on the basis of initiatives embarked upon autonomously and with no coordination between public and private players in the area.

The overall impression is that everyone is waiting for someone to make the first move, to offer their services – armed with an idea, a solution, a plan of action – as a pivot and facilitator for a long-term project whose aims are to highlight and showcase not only the qualities of the Adriatic Sea and of the maritime tourism sector, but also the extraordinary beauty of this part of the world.

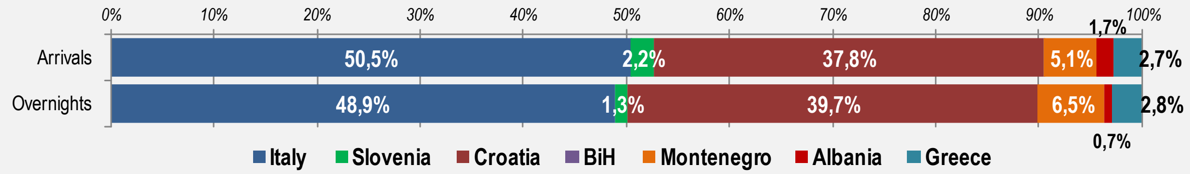
COASTAL TOURISM IN ADRIATIC

Coastal tourism definition is based on a combination of many different factors that are at the intersection between sea and land. We can present it like travelling from a place of residence to a coastal destination that includes in its offer also maritime activities and recreation. Regarding tourism in Adriatic coasts there is not so much available data, while given figures are referred to the whole Europe. Among them, it is remarkable how European coastal areas attract more than one third of all tourism business in Europe.

Trying to fill the gap, or at least to start filling the gap, we have collected data from all the 244 Municipalities facing Adriatic Sea. That means we have not included the entire Adriatic Regions but only the coastal destinations. Details of the considered areas are available at the end of this focus.

Adriatic Sea coastal tourism areas hosted in 2015 30.04 million of arrivals and 163.76 million of overnights. More in details 30,037,689 arrivals and 163,765,749 overnights. Adriatic coastal tourism capacity exceeded 2.3 million beds (meaning that one out of 12 beds in Europe was located in the Adriatic coast). The aggregated data for single countries are shown in the following graph.

Graph F1] *National share tourism arrivals and overnights of coastal tourism in Adriatic, 2015*



Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

The overall Adriatic average of overnights-arrivals ratio was 5.45 and on a national scale the results were very different, with the highest value in Montenegro (6.99) and the lowest in Slovenia (3.28); Croatia and Italy totalized 5.73 and 5.28 respectively.

Considering the data on a regional perspective, Italian municipalities of Emilia-Romagna region coast were the ones with the highest number both of arrivals and overnights (5,488,601 and 27,917,179) followed by the Italian coastal municipalities of Veneto (4 million arrivals and 25 million overnights) and the Croatian coastal municipalities of Istra (3,408,423 and 22,637,432). Only these 3 coastal areas took 42% of total Adriatic tourism arrivals and 46% overnights. The average ratio overnight-arrivals on a regional coastal scale resulted higher in Montenegro (with Tivat, Bar and Herceg Novi to lead the rank).

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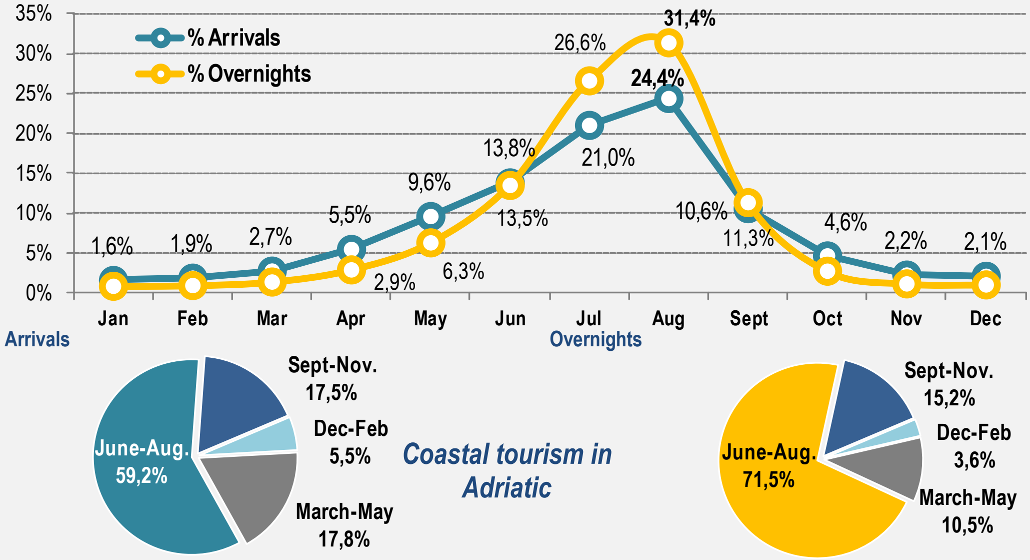
Additional and interesting info are the ones related to seasonality, which we tried to analyse in order to provide some details.
We divided the area into Western Adriatic comprising all the Italian coastal municipalities and Eastern Adriatic comprising all the other municipalities. We managed to collect 2015 data from 79.3% of the Balkan municipalities (all the Montenegrin and the great majority of Croatian municipalities) while a lower representation of Italian municipalities (we started focusing on the more representative tourism destinations in terms of arrivals and overnights like for example Bari, Lecce, Ravenna, Venice and Vieste). The Eastern Adriatic Municipalities showed 67.9% of arrivals share and 75.8% of overnights share in the three summer months (June, July and August). Western Adriatic shown lower values with 51.6% of the total arrivals and 66.4% of the total overnights in the summer months. We noticed that autumn months (September, October and November) had a higher share than spring (March, April and May) in Eastern Adriatic municipalities both in arrivals and in overnights (16.5%/14.9% and 13.4%/8.2%) while in Western municipalities (Italy) spring share was higher than autumn share just for arrivals but not for overnights (21.6%/13.3% for spring and 18.3%/15.5% for autumn). Winter coastal tourism in Adriatic had, of course, the lowest share in both coasts.

Graphs F2, F3, F4] *Monthly and trimester share of coastal tourism in Adriatic (arrivals left pie and overnights right pie), 2015*



Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

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With regards to the variation of 2015 data on the previous year, a general trend of growth for the entire Adriatic coastal area was recorded, with arrivals that grew up to +7.4% and overnight stayed up to +9.1%, with Croatia and Montenegro to show the greater positive variations. To have some further detail of tourism economies of Adriatic destinations we also started analysing specific results about 15 of them that have maritime tourism among their strengths. These selected municipalities in addition to coastal tourism have an intense maritime activity mainly based on cruises and ferries: Venice, Bari, Brindisi, Trieste, Ancona, Ravenna, Pula, Dubrovnik, Split, Zadar, Rijeka, Kotor, Bar, Igoumenitsa and Corfu.

Table T1] *Coastal tourism in some maritime tourism destinations Adriatic, 2015*

	Tourism Arrivals	Tourism Overnights	Overnights/arrival ratio
Bar	183,416	1,532,596	8.36
Ravenna (only Lidi*)	349,546	2,186,740	6.26
Corfu	771,162	4,438,356	5.76
Pula	292,852	1,544,364	5.27
Kotor	74,964	358,609	4.78
Zadar	391,144	1,433,701	3.67
Dubrovnik	932,621	3,301,667	3.54
Ancona	147,261	482,564	3.28
Venice (only Lido*)	189,022	567,700	3.00
Split	487,474	1,339,598	2.75
Igoumenitsa	43,599	110,194	2.53
Brindisi	64,808	148,592	2.29
Trieste	343,139	780,242	2.27
Rijeka	106,056	213,549	2.01
Bari	339,698	629,501	1.85

Source: Risposte Turismo (2017), Adriatic Sea Tourism Report. Note (*) see methodology below.

Methodology; regarding Italy we considered all the Municipalities bordering Adriatic Sea starting from Castrignano del Capo in the South to Muggia in the North for a total of 130 entities in 7 Regions (Puglia, Molise, Abruzzo, Marche, Emilia-Romagna, Veneto and Friuli-Venezia Giulia). For the purpose of this entire work for Venice and Ravenna we considered just the data of their coastal zone and not the city centres. Regarding Slovenia we analysed its four Municipalities that border Adriatic Sea (Ankaran, Koper, Izola and Piran, as Portoroze is included in Piran). The Croatian coastal zone is the second biggest area after Italy: stretching from Umag in the North to Dubrovnik in the South, it comprises 86 Municipalities and 7 Counties (Istra, Primorje-Gorski Kotar, Lika-Senj, Zadar, Šibenik-Knin, Split-Dalmatia and Dubrovnik–Neretva). Neum is the only Bosnian Municipality bordering the Adriatic Sea while Montenegro and Albania comprise 6 and 13 Municipalities respectively (from Herceg Novi to Sarandë). In regards to Greece we included in the survey just three northern Municipalities that stretch toward Adriatic Sea (Corfu, Souli-Filiates and Igoumenitsa).

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