Adriatic Sea Tourism Report
2019 Edition

EXECUTIVE SUMMARY

MARITIME TOURISM IN THE ADRIATIC SEA AND THE 2020 THRESHOLD

The 2019 edition of Adriatic Sea Tourism Report (ASTR) continues the series dedicated to analysis and description of maritime tourism in the Adriatic Sea, with information and data updated every year since the first edition (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.

This report is derived from information and data collected directly by Risposte Turismo, thanks to lengthy, in-depth dialogue with several Adriatic stakeholders who collaborated. These stakeholders include ports and marinas (individual and networks), passenger terminals, charter operators, navigation and tourism companies, national institutes of statistics, tourism destinations, public administrations and tourism boards. ASTR also contains 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.

The 2019 edition of the report – in addition to methodology and this introduction – maintains its chapter structure, the ones focussing on the cruise, ferry and sail and yachting sectors. The edition includes graphs, tables and maps and an examination of the movements of tourists by sea, directions, dimensions and behaviours. As was the case with the previous Adriatic Sea Tourism Report, the final chapter has a special focus. This year it concerns the Adriatic maritime tourism projects ongoing and recently approved. A double ad-hoc survey of the nautical sector was conducted again this year in the first five months of 2019. It was addressed to marinas and charter companies, and it highlights information relating to demand and supply from a transnational viewpoint.

The Adriatic is an international space for which efforts are still required if it is to be fully recognised as a brand and as a unique destination. Studies and analysis like this may contribute, but greater commitment both from public and private operators is needed. The summary of data below should be sufficient to give an idea of the unequivocal relevance that the Adriatic assumes in international geography and maritime tourism. However, the overall results - even with an expected increase due to an overall positive outlook in 2019 - still do not appear to be aligned with the potentials.

Maritime tourism in the Adriatic Sea in 2019 at a glance: Adriatic gates and routes

Source: Risposte Turismo (2019), Adriatic Sea Tourism Report.

more than 30 cruise ports
5,16 million passenger movements and 3127 cruise calls

more than 40 ferry ports
over 19 million passengers, 6 of them travelling the international routes

332 structures for boat tourism
more than 75,000 moorings

Full report available on **www.adriaticseaforum.com**

Adriatic Sea Forum – Cruise Ferry Sail & Yacht

Adriatic Sea Tourism Report and Adriatic Sea Forum are projects by Risposte Turismo

ADRIATIC SEA TOURISM REPORT 2019 EDITION
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MARITIME TOURISM MOVEMENTS IN ADRIATIC COUNTRIES

CRUISE

Cruise traffic by country, absolute values and share %, 2018

PORTS	2018		Share % on total	
Country	Pax. mov.	Calls	Pax. mov.	Calls
ITALY*	2,420,333	978	46.9%	31.3%
CROATIA	1,300,845	1,180	25.2%	37.7%
GREECE*	737,479	415	14.3%	13.3%
MONTENEGRO	514,948	427	10.0%	13.7%
SLOVENIA	101,415	75	2.0%	2.4%
ALBANIA	84,815	52	1.6%	1.6%
BOSNIA-HERZEGOVINA	0	0	0.0%	0.0%
TOTAL 2018	5,159,835	3,127	100%	100%

Note (*): both for Italy and Greece, only their Adriatic ports are considered.

FERRY

Ferry, hydrofoil and fast catamaran passenger movements by country, absolute values and share %, 2018

PORTS	2018		Share % on total	
Country	Pax. mov.	Calls	Pax. mov.	Calls
CROATIA	9,560,814	46,433	48.4%	50.9%
GREECE **	5,394,028	33,765	27.3%	37.0%
ITALY **	3,292,455	7,302	16.7%	8.0%
ALBANIA	1,487,568	3,525	7.5%	3.9%
SLOVENIA	14,850	120	0.1%	0.1%
MONTENEGRO	n.a.	n.a.	n.a.	n.a.
BOSNIA-HERZEGOVINA	0	0	0.0	0.0
TOTAL 2018	19,749,715	91,145	100%	100%

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.

SAIL & YACHT

Values and shares of berths and structures in Adriatic by country, 2019

	Berths		Structures		Avg. berths per structure**
	value	% share	value	% share	
ITALY*	49,186	65.5%	186	56.0%	264
CROATIA	17,459	23.3%	125	37.7%	140
SLOVENIA	3,101	4.1%	8	2.4%	388
MONTENEGRO	2,851	3.8%	8	2.4%	356
GREECE*	2,255	3.0%	4	1.2%	564
ALBANIA	200	0.3%	1	0.3%	200
BOSNIA-H.	0	0.0%	0	0.0%	n.a.
TOTAL	75,052	100%	332	100%	226

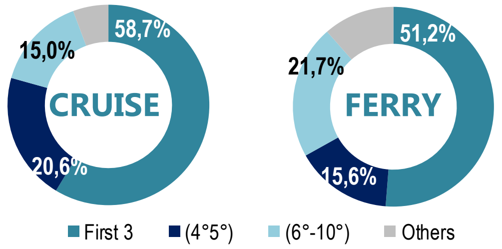
Notes: (*) both for Italy and Greece, only their Adriatic ports were considered; (**) the values are rounded either up or down to whole numbers.

Berths, structures and the average of berths per structure in the Adriatic areas, 2019

	Berths % share	Structures % share	Avg. berths per structure
NORTH	57.7%	58.7%	222
CENTRE	19.5%	19.3%	229
SOUTH	22.8%	22.0%	234
	100%	100%	226

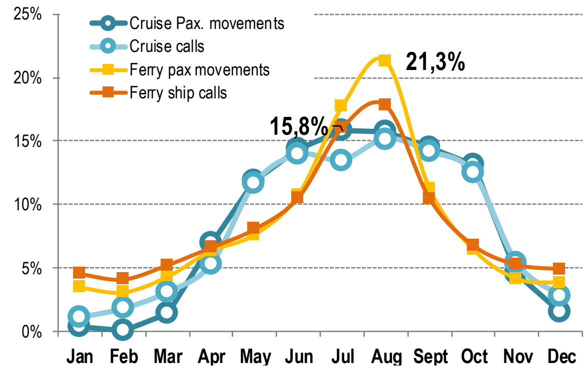
MARKET CONCENTRATION (PORTS TRAFFIC)

Concentration of cruise and ferry passenger movements in Adriatic ports, 2018



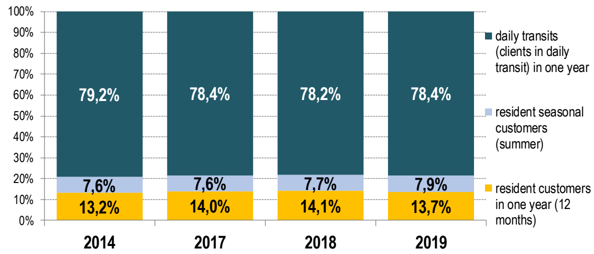
ADRIATIC SEASONALITY

Monthly share of cruise and ferry passenger movements and cruise and ferry calls of Adriatic cruise and ferry ports, 2018

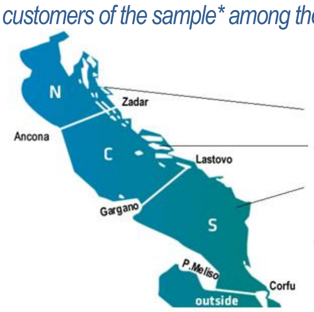


BOATING CLIENTS IN ADRIATIC

Distribution of the type of clients of the sample of marinas, 2014, 2017, 2018 and forecasts, 2019*



The distribution of the itineraries chosen by the charter companies customers of the sample among the 4 areas of the Adriatic Sea, 2019*



Northern Adriatic	39.7
Central Adriatic	41.0
Southern Adriatic	17.3
Outside the Adriatic	2.0
	100%

Note: (*) the 2019 panel count on 49 marinas and 19 charter companies

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CRUISE

FORECASTS

2019 CRUISE FORECASTS	Pax. mov.	Calls	% Pax. mov.	% Calls	Abs. Pax	Abs. Calls
			Variations 2019 on 2018			
Venice	1,560,579	502	*stable*	*stable*	*stable*	*stable*
Corfu	787,389	416	7.0%	0.7%	51,557	3
Dubrovnik	745,815	475	1.8%	8.4%	13,384	37
Kotor	638,572	519	29.7%	26.3%	146,097	108
Bari	610,000	233	6.5%	9.4%	37,094	20
Split	337,042	292	9.7%	12.3%	29,903	32
Zadar	182,214	142	9.4%	6.8%	15,686	9
Sarande	120,000	65	53.3%	54.8%	41,718	23
Brindisi	110,000	45	5.3%	-2.2%	5,572	-1
Koper	102,400	69	1.0%	-8.0%	985	-6
Trieste	100,000	63	7.7%	10.5%	7,152	6
Ancona	92,100	46	37.4%	15.0%	25,069	6
Rijeka	46,427	27	325.4%	145.5%	35,514	16
Bar	23,000	17	2.3%	6.6%	527	1
Sibenik	20,823	99	-41.7%	-9.2%	-14,906	-10
Korcula	16,363	95	-23.4%	-23.4%	-4,995	-29
Durres	13,100	20	100.5%	100.0%	6,567	10
Ravenna	11,720	34	-35.1%	-2.9%	-6,348	-1
Rovinj	11,388	60	0.0%	-7.7%	0	-5
Pula	3,200	26	16.6%	0.0%	441	0

+7.3% on 2018

+7.2% on 2018

Notes: forecasts on passenger movements are based on 23 ports data (representing the 99.7% of the total passengers and 99.3% of cruise calls registered in 2018)

FERRY

2019 FERRY FORECASTS

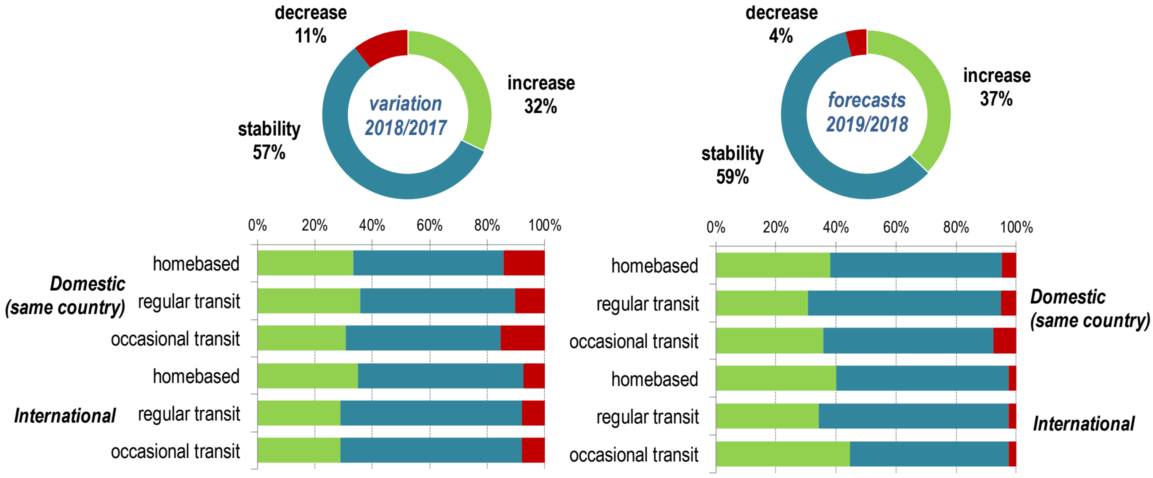
Half of the Adriatic ports provided forecast for 2019 but some of the major ports are missing: this is the reason why it is difficult to make forecasts on the overall ferry traffic in the Adriatic. Moreover, this kind of traffic is highly dependent on external factors, such as weather, petrol costs and travel alternatives.

Anyway, with the positive or negative variations previously presented, and with several ports that foresee a certain stability, it is reasonable to expect that this sector won't register relevant variation.

SAIL & YACHT

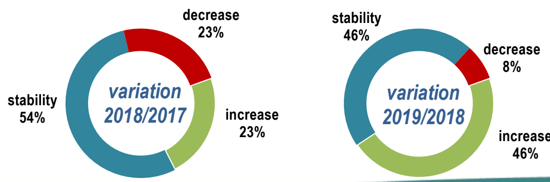
FORECASTS

Variations in clientele of interviewed marinas in Adriatic, 2018/2017 and 2019/2018

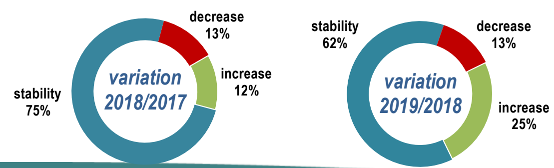


Variations in clientele of interviewed charter companies in Adriatic, 2018/2017 and 2019/2018

SAILING BOATS



MOTORBOATS



CRUISE AND FERRY PASSENGERS BRINGS ECONOMIC BENEFITS

Risposte Turismo estimates that the cruise tourists spent in 2018 more than 362 Million euro in Adriatic destinations, considering not only the 1.78 million cruisers that embarked or disembarked in one of the ports of the region but also the 3.356 million cruisers who visited other ports along their itineraries. This value does not take into account crew expenditures onshore (approximately an additional 14 Million euro over the year) and the impact of the extended cruise industry (ships, ports, suppliers, and so on). This is therefore an amount limited to the cruisers' expenditures on shore. Risposte Turismo estimates that direct expenditures on shore by ferry passengers in the Adriatic and only on international routes reached 60 Million euro in 2018. Furthermore it should be considered that the entire ferry industry and tourism guarantees a much higher economic impact when other kinds of expenditures are considered (once again, for these industry, ships, ports, crews, suppliers and so on).

Considering just the expenditures of tourists/passengers on shore moving through the two components of maritime tourism in Adriatic, cruise and ferry - accounted for more than 420 Million euro in 2018, but the economic impact of these two sectors (cruise & ferry) in the area is indeed much higher, considering the fact that tourists' direct expenditures are just a part of the overall contribution to the Adriatic economy.

EUROPEAN PROGRAMMES, PROJECTS AND THE ADRIATIC MARITIME TOURISM

From the point of view of organizing and fostering the tourism supply side, our company believes that the Adriatic Sea merits yet more attention and commitment as one of the pillars of the ASF project as a whole.

When the first Adriatic Sea Forum took place, the EU Strategy for the Adriatic and Ionian region had not yet been adopted. However, in 2013 the Europe 2020 agenda, the 10-year plan, was already in effect and was used as a reference framework for all the activities at EU and national and regional levels. Approaching the end of the 2014-2020 programming period, EUSAIR Strategy hasn't had – and will not have – its own funds, but cooperation programmes of cooperation of the area funded and supported projects with activities and aims that are in line with EUSAIR activities and aims. Adriatic regions are eligible in many programmes: from the latest IPA CBC Italy-Albania-Montenegro and on to Italy-Croatia, Italy-Slovenia, ADRION or Interreg MED and others.

In the Adriatic Sea Tourism Report 2019 itself, we analyse all these programmes, highlighting the more relevant projects for stakeholders operating in maritime tourism in Adriatic. The overall budget of all the selected projects is **19.5 million euro**. This significant economic value should boost the three sectors and, more in general, the maritime tourism economy and jobs, if the expected objectives are achieved. The topics targeted by the approved projects are described in the full report. Some of these topics are as follows: **cruise and ferry homeports** integration for various modes of transport, especially regional airports in peak seasons; development of **sustainable urban mobility plans** and mitigation of the impact that cruise ships related **traffic** has on cities, to enhance the quality of life of inhabitants and passengers; development of a common model and plans for the enhancement of **nautical tourism in 21 small and medium-sized ports;** promotion of sustainable tourism and blue growth in the program area through turning the important **maritime cultural heritage** of 8 Adriatic Italian and Croatian ports to best account; the **maritime production cluster** (including the shipbuilding area), interaction gaps; and more sustainable and greener shipbuilding.

The overall impression is that, even with concerted efforts on the part of the joint secretariats to attain higher cost efficiency (in particular, leakages in dissemination and promotion activities) and new networking opportunities, project partners differ in their views on priorities. Compared to the project aims, the activities carried out focus on narrow and local scopes and do not impact the framework in the mid-term.

Adriatic Sea Tourism Report and Adriatic Sea Forum are projects by

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