Adriatic Sea Tourism Report

2016

realised by

Risposte Turismo

ADRIATIC SEA TOURISM REPORT
2016 EDITION

INDEX

Adriatic Sea Tourism Report and Adriatic Sea Forum are projects by

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METHODOLOGY

Since its first edition, Risposte Turismo has produced the Adriatic Sea Tourism Report through direct requests addressed to the key stakeholders in maritime tourism, checking answers and results 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 2016.
- 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 2016 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 327 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 (2015) and forecasts for the upcoming season (2016). In this edition, 59 marinas and 24 charter companies took part in the survey by completing the form, representing 17.1% and 10.6% respectively, of all active operators.
- Regarding the 'common framework', 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).

1 MARITIME TOURISM IN THE ADRIATIC SEA

Since 2013 Adriatic Sea Tourism Report provide an annual document dedicated to the analysis and description of maritime tourism and passenger traffic in the Adriatic Sea. At its 4th edition Adriatic Sea Tourism Report is a reliable tool to be informed and deepen quantitative and qualitative info about cruise, ferry, sailing and yachting tourism in the Adriatic Sea.

Again in 2016 this report is the result of an extensive dialogue carried out by Risposte Turismo with many Adriatic stakeholders – among them ports and marinas (individual and networks), passenger terminals, charter operators, tourism companies and national institutes of statistics – we would like to thank for their collaboration. It is also the result of a continuous effort in terms of analysis, studies, search of info and data about traffics, investments, priorities, strategies and plans related to the dynamics of the monitored sectors in the Adriatic area and not only.

As we already wrote in the past editions of this report, the Adriatic is an international space that still requires a considerable amount of work in order to be fully recognised as a destination with its own image, position and character. Studies and analysis like this may give a contribution but a stronger commitment both from public and private operators is needed. After almost 18 months from its formal adoption by the European Commission, the EU Strategy for the Adriatic and Ionian Region (EUSAIR) with its Action Plans could be considered a platform quite well known by the professional involved in the dynamics – not only the tourist and the maritime ones – of that area, but many steps have to be made in order to reach concrete results and produce real consequences developing the pillars of the strategy. The 1st EUSAIR Forum was held in Dubrovnik on the 12th and 13th of May 2016, where some of the info included in this report have been presented, and should represent a new incentive to move forward.

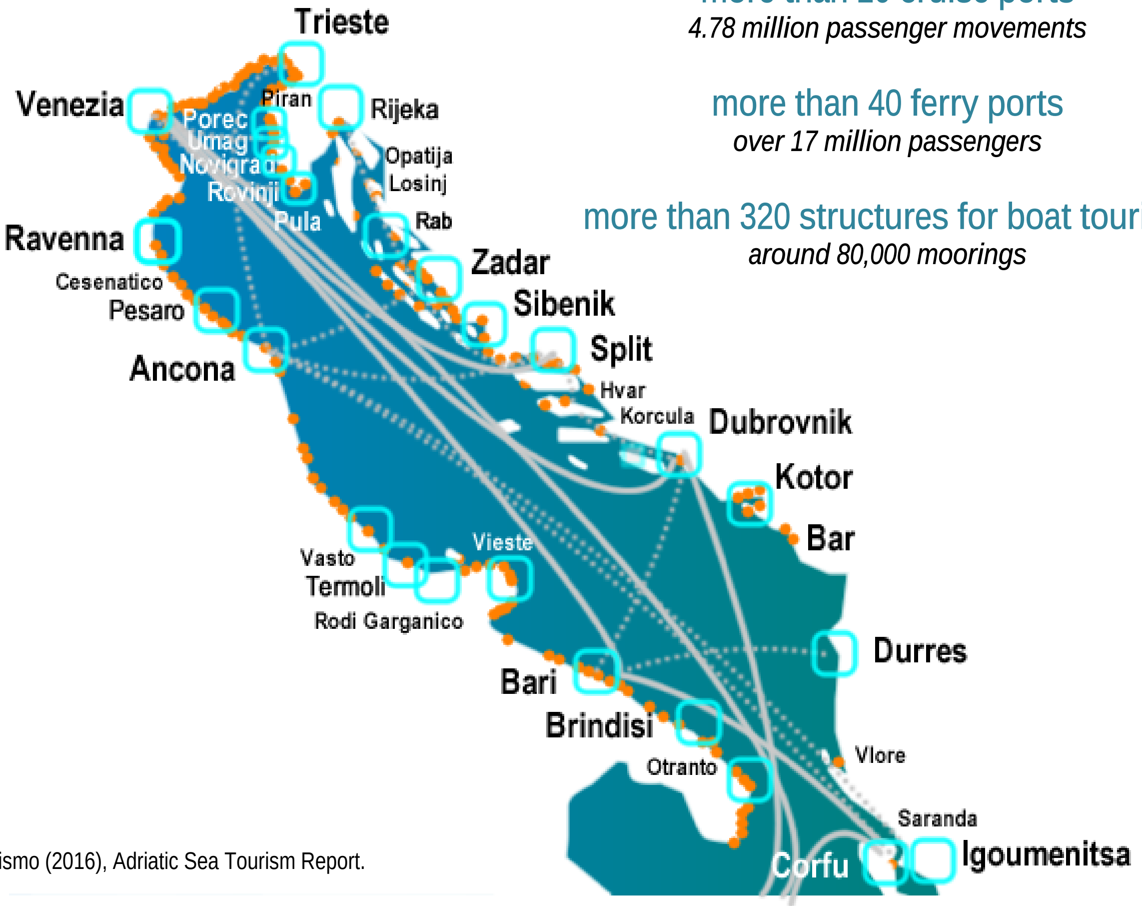
The UE affirms that the general objective of the new strategy is to promote sustainable economic and social prosperity of the region through growth and creation of jobs, by improving its attractiveness, competitiveness and connectivity, while preserving the environment and ensuring healthy and balanced marine and coastal ecosystems. 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 useful 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.

As for the previous editions, the 2016 report contains, together with this introduction, three chapters each of them focused on cruise, ferry, and sailing and yachting, to close with a final chapter that try to summarize and highlight few strategic elements to better understand and frame the all Adriatic area as a unique one for the entire maritime tourism sector. The document is mainly made up of an examination of the movements of tourists by sea, recording flows, dimensions, directions and behaviours in tables, graphs and maps. For the fourth year in a row a double ad-hoc survey, addressed to marinas and charter companies, realised in the first months of 2016, completes the statistical data highlighting information related to the demand and supply of nautical tourism in the area with a transnational perspective, an element that characterises the Adriatic Sea Tourism Report series.

In 2015 more than 20 cruise ports recorded 4.8 million cruise passenger movements, a value that includes both cruisers in transit or embarking and disembarking. Over 17 million sea travellers used a ferry, a hydrofoil or a fast catamaran in the Adriatic, with additional passengers crossing domestic channels and reaching islands by sea. With regard to nautical tourism this latest update reveals more than 320 structures dedicated to this form of tourism that could host up to 80,000 boats. The map provides a synthesis of these first fundamental numbers.

Overall, the Adriatic showed different trends within the single ways of enjoying the common sea. A cruise sector that in the ASTR 2013 seemed unstoppable with a constant growth year by year registered in the following ones' different directions. This was particularly evident in Venice, that still suffers an unclear legislative framework that influences the overall Adriatic traffic. The fall registered since 2014 in cruise traffic in Adriatic was the highest ever, not so different if compared to other Mediterranean areas. Ferry kept the positive signal already showed last year, or at least maintained a stability instead of a

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



more than 20 cruise ports
4.78 million passenger movements

more than 40 ferry ports
over 17 million passengers

more than 320 structures for boat tourism
around 80,000 moorings

Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

constant decline in passengers on board, once again positively affected by the drop of the oil price fell down from $100 in April 2014 to $40 in April 2016. Little changes have been registered in terms of concentration traffic in ports and seasonality of maritime tourism traffics, both regarding cruising and ferry. Nautical sector in Adriatic registered various trends, but the interviewed marinas and charter companies revealed an increasing level of confidence in a positive future, something definitively different from the sentiment registered back in 2013.

What seems interesting, in a middle-term perspective, is the creativity and commitment of some operators and companies even if too often new routes had been active just for one season.

So, quite good results but still not aligned with the potentialities of this outstanding area full of precious natural, historical and artistic resources able to attract tourists from every corner of the world. But to really let them come to sail and visit the Adriatic many efforts still have to be produced, in terms of infrastructures, services and promotion.

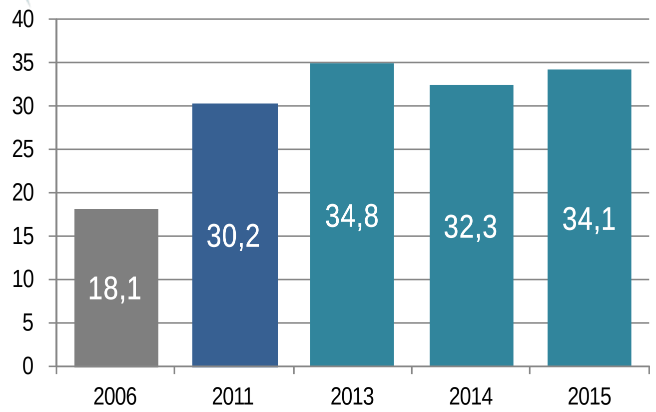
With this report, and the work that is behind it, we want to reserve to this area a useful support through in-depth analyses capable to give a contribution to the strategic approach and to the management policies to be adopted to guarantee - for the whole area, to those who work and live there - a harmonious, sustainable and at the same time solid future development. But evidently concrete results may be achieved only through a serious long-term commitment expressed by the governments of the Adriatic countries. A commitment with which not only to stimulate investments and actions of the numerous private operators involved in this articulated phenomenon, but also to concretely support the launch of the Adriatic as a unique destination to compete on a global scale with desirable products to be sold in a global market.

Let's work together to give the Adriatic maritime tourism industry the strength and results it deserves. We are and will be grateful to all the ones who decide to help us in giving this report continuity and always new contents, and look forward to see you at the next edition of Adriatic Sea Forum.

2 CRUISE TRAFFIC

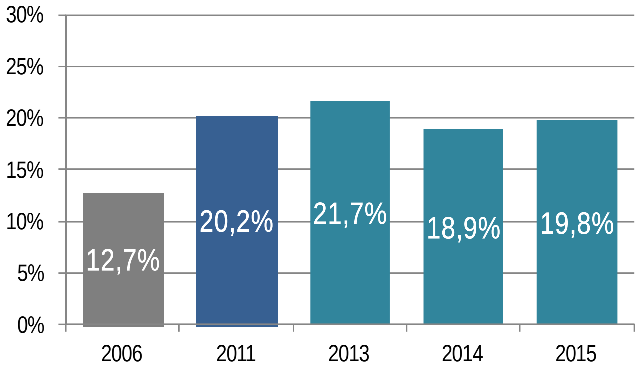
Graphs 1 & 2] *Cruise passenger movements and deployment of ship cruises in the Mediterranean and Black Sea, 2006 -2015*

CRUISE PASSENGER MOVEMENTS IN THE MED AND BLACK SEA



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

CRUISE DEPLOYMENT SHARE IN THE MED



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

Cruising is growing on a global scale with 23 million customers recorded in 2015 according to CLIA data, and forecasts of another record achieved by the end of 2016 with 24 million cruisers worldwide, continuing the positive trend.

Focusing on the Mediterranean, after the drop in 2014, the area again recorded a growth in cruise passenger movements in 2015 with around 34 million (graph 1).

The area has played a key role in the past decade gaining a significant share of the total cruise beds deployed per destination, and reaching around 20% by the end of 2015. Graph 2 shows the growing deployment in the Med in 2015.

For 2016, the redeployment of some cruise ships is expected, so the Med would lose a small amount of its global share (down to 18.7%) in favour of larger shares of Northern Europe and Asia, which in 2016 will be the fourth deployment area in the world (9.2%).

Table 1] *Cruise passenger traffic in the 4 macro areas of the Mediterranean, share percentages, 2011-2015*

Region	2015	2014	% Variation 2015 on 2014	2013	2012	2011	% Variation 2015 on 2011
WEST MED	19,640,962	17,971,531	9.3%	18,857,996	18,529,712	18,942,057	3.7%
ADRIATIC	4,493,707	4,604,764	-2.4%	5,117,572	4,819,754	4,730,757	-5.0%
EAST MED	3,001,964	3,022,838	-0.7%	3,583,558	3,261,300	377,129	696.0%
BLACK SEA	69,930	162,588	-57.0%	187,872	142,168	117,632	-40.6%
Total	27,206,563	25,761,721	5.6%	27,746,998	26,752,934	24,167,575	12.6%

Source: MedCruise (2016), "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 under estimate (around 80% of total cruise passenger movements in the Med).

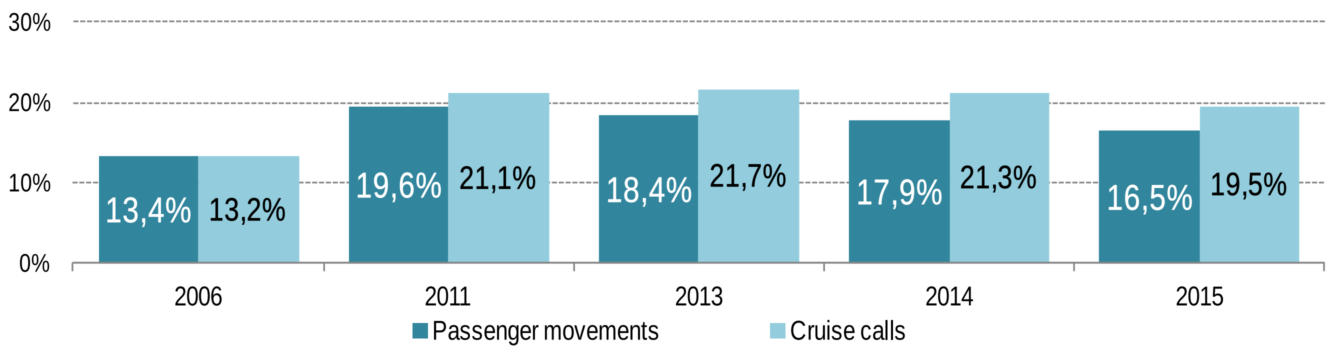
Table 2] *Cruise calls in the 4 macro areas of the Mediterranean, share percentages, 2011-2015*

Region	2015	2014	% Variation 2015 on 2014	2013	2012	2011	% Variation 2015 on 2011
WEST MED	8,284	8,327	-0.5%	8,881	8,590	8,780	-5.6%
ADRIATIC	2,555	2,917	-12.4%	3,221	3,239	3,236	-21.0%
EAST MED	2,167	2,140	1.3%	2,430	2,525	3,083	-29.7%
BLACK SEA	76	332	-77.1%	332	234	232	-67.2%
Total	13,082	13,716	-4.6%	14,864	14,588	15,331	-14.7%

Source: MedCruise (2016), "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 under estimate (around 77% of total cruise calls in the Med).

Cruise companies operating in the Mediterranean can define their itineraries among more than 100 cruise ports, with some of these having only recently developed their role thanks to new investments in facilities for ships and passengers. The growth of the Mediterranean is evident (around 5%) in terms of passenger movements in 2015 compared to the previous year, with cruise passengers again reaching the threshold of 27 million. On the other hand, cruise calls continued to drop in 2015 (-4.6%). Considering the last five years, there has been a positive variation between 2011 and 2015 in terms of passenger movements (+12.6%), but consistently negative variation in terms of cruise calls (-14.7%). Dividing the Med into the four macro areas listed in tables 1 and 2, the Adriatic reveals a negative variation 2015 on 2014 in both variables of cruise traffic (-2% considering MedCruise member ports).

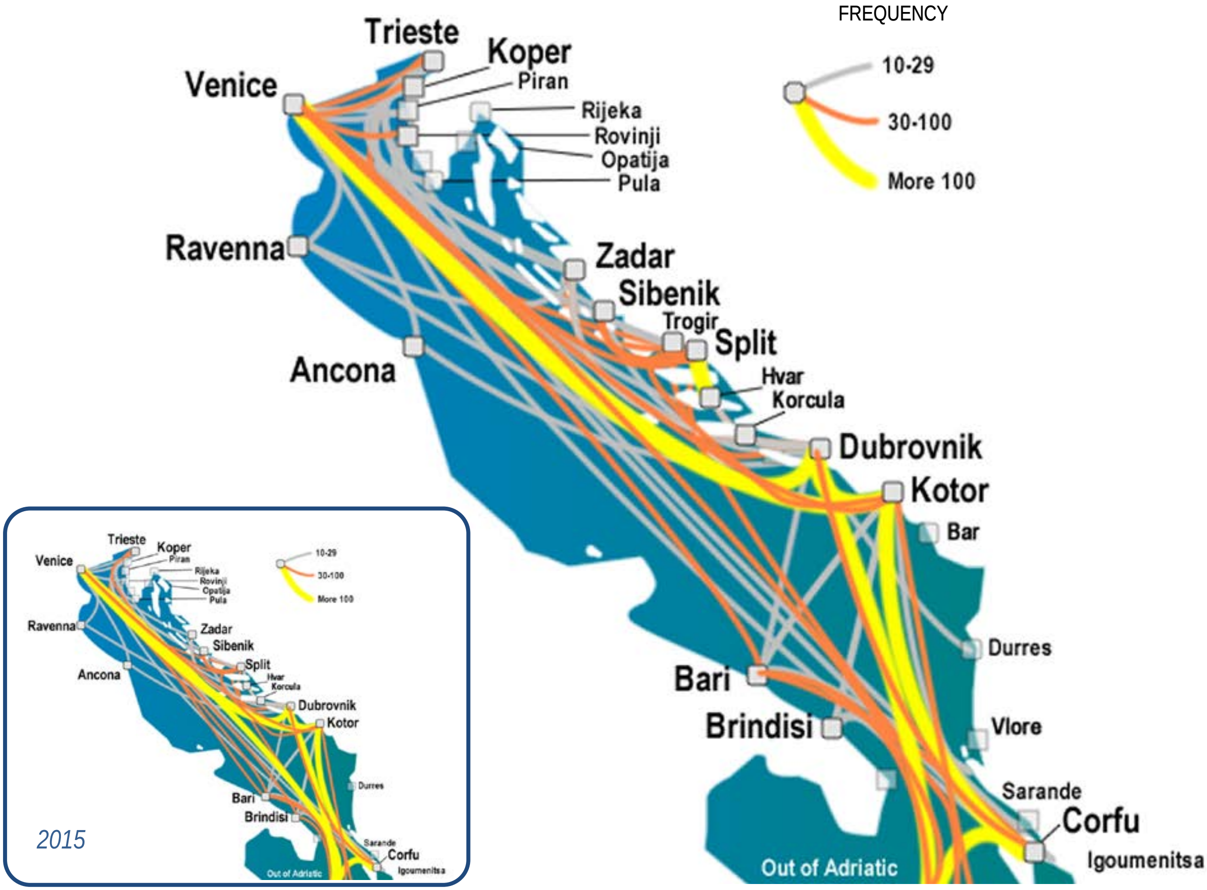
Graph 3] *Adriatic cruise passenger movements and cruise calls share of the Mediterranean 2006, 2011 and 2013-2015*



Source: MedCruise (2016), "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 under estimate.

The Adriatic Sea's role in the cruising geography of Mediterranean registered a small decrease both in terms of passenger movements and calls over the last three years, recently dropping to under 20%. In 2015, Adriatic cruise passenger movements represented 16.5% of overall traffic and 19.5% in terms of cruise calls.

Map 2] *Main cruise routes in the Adriatic Sea, 2016*



Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

In the Adriatic Sea, the main cruise routes involve the ports of Venice, Dubrovnik, Corfu and Kotor. There is a branched network of connections among all Adriatic cruise ports that is expected to increase this year revealing different options for the itineraries sailed by cruise companies, including more connections to Albanian ports.

According to 2016 cruise schedules, even if slightly less than in 2015, a considerable number of cruises, after calling at Venice, still overstep the Adriatic without any other port calls in the area.

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

	Cruise port	Country	Cruise traffic		Share % on total	
			passenger movements	calls	passenger movements	calls
1	VENICE	ITA	1,582,481	521	33.1%	16.3%
2	DUBROVNIK	HR	812,608	603	17.0%	18.9%
3	CORFU	GRE	647,346	407	13.5%	12.7%
4	KOTOR	MON	448,579	411	9.4%	12.9%
5	BARI	ITA	367,791	147	7.7%	4.6%
6	SPLIT	HR	271,445	261	5.7%	8.2%
7	BRINDISI	ITA	151,922	60	3.2%	1.9%
8	TRIESTE	ITA	134,265	45	2.8%	1.4%
9	ZADAR	HR	74,660	96	1.6%	3.0%
10	KOPER	SLO	57,893	49	1.2%	1.5%
11	KORČULA	HR	42,645	143	0.9%	4.5%
12	RAVENNA	ITA	39,964	34	0.8%	1.1%
13	ANCONA	ITA	39,277	24	0.8%	0.8%
14	HVAR	HR	29,815	72	0.6%	2.3%
15	SIBENIK	HR	17,562	92	0.4%	2.9%
16	SARANDE	ALB	17,236	87	0.4%	2.7%
17	ROVINJI	HR	15,593	55	0.3%	1.7%
18	RIJEKA	HR	9,082	7	0.2%	0.2%
19	DURRES	ALB	8,060	12	0.2%	0.4%
20	PULA	HR	5,288	14	0.1%	0.4%
	Other ports		10,298	55	0.2%	1.7%
	TOTAL		4,783,810	3,195	100%	100%

Source: Risposte Turismo (2016), Adriatic Sea Tourism Report. Data provided to Risposte Turismo directly by cruise ports and national statistics offices.

Venice continues its leadership among the main 20 cruise ports of the Adriatic listed in table 3, consisting of more than 1.5 million passenger movements, with a share of 33% of the total. Dubrovnik - second in terms of passengers - leads also this year for cruise calls. The total traffic in the Adriatic increased from the results achieved in 2014 to nearly 4.8 million. Cruise calls also increased to 3,195.

Table 4] *Concentration of cruise passenger movements in Adriatic ports, 2013-2015*

Passenger movements	first 3	first 5	first 10
2015	63.6%	80.7%	95.1%
2014	69.9%	88.6%	97.0%
2013	69.9%	87.6%	97.7%

Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

In 2015 concentration related to passenger movements decreased from 2014 if related to values of the three cases of table 4. Cruise calls show lower values, with 48.2% of the calls registered in the first 3 ports, revealing a wider distribution.

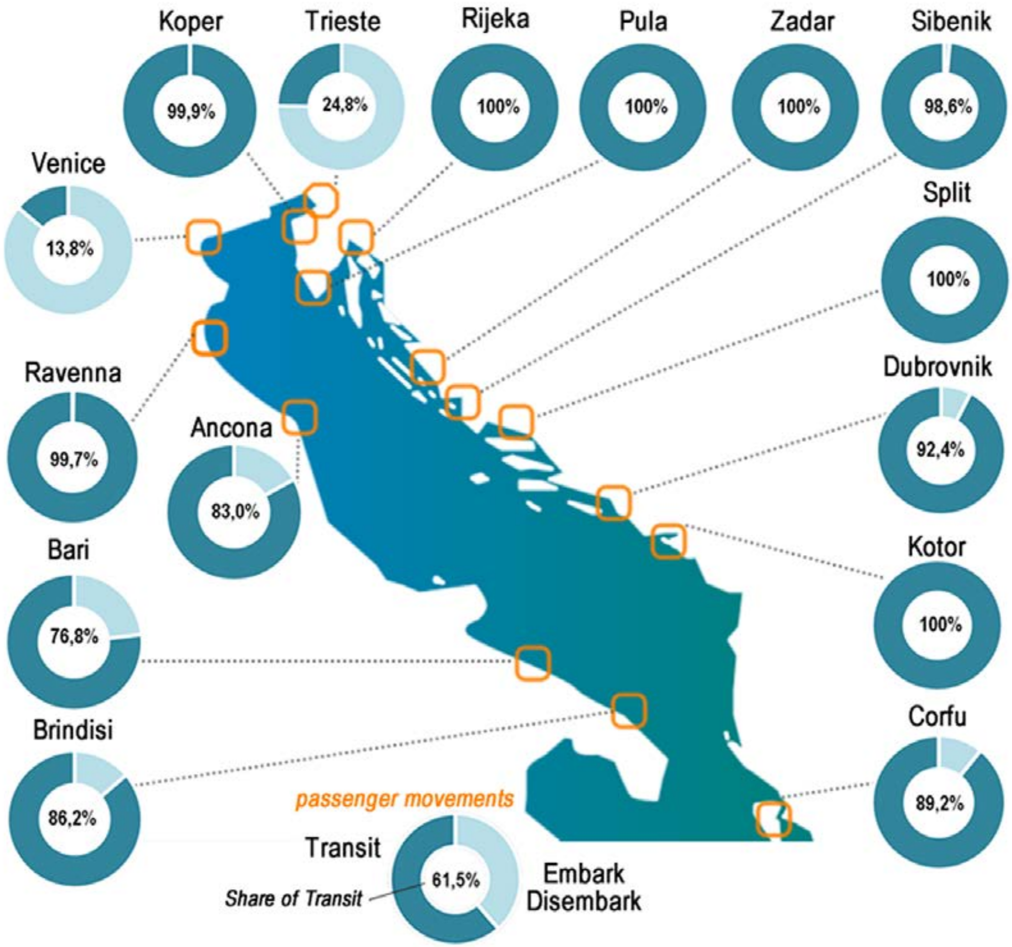
Table 5] *Cruise traffic by country, absolute values and share percentages, 2014 and 2015*

PORTS	2015		Share % on total		2014		Variation % on 2014	
Country	Pax. mov.	Calls	Pax. mov.	Calls	Pax. mov.	Calls	Pax. mov.	Calls
ITALY*	2,317,486	850	48.4%	26.6%	2,446,775	768	-5.3%	10.7%
CROATIA	1,280,010	1,353	26.8%	42.3%	1,184,832	1,308	8.0%	3.4%
GREECE*	651,526	416	13.6%	13.0%	676,209	410	-3.7%	1.5%
MONTENEGRO	448,579	411	9.4%	12.9%	309,322	353	45.0%	16.4%
SLOVENIA	60.913	66	1.3%	2.1%	60,499	54	0.7%	22.2%
ALBANIA	25,296	99	0.5%	3.1%	13,636	46	85.5%	115.2%
BOSNIA-HERZEGOVINA	0	0	0.0%	0.0%	0	0	0	0
TOTAL 2015	4,783,810	3,195	100%	100%	4,691,273	2,939	2.0%	8.7%

Source: Risposte Turismo (2016), Adriatic Sea Tourism Report. Note (*): both for Italy and Greece, only their Adriatic ports are considered.

The two main countries that represent more than 7/10 of the whole Adriatic Sea show different trends. Croatia has grown both in passenger movements and cruise calls while Italy only in cruise calls. The Adriatic country of Montenegro recorded a positive variation from 2014 to 2015, thanks to an increase in cruise passengers in the port of Kotor. It is interesting to note that cruise traffic in Albanian ports of Durres and Sarande doubled in one year, even though the country represented a share of less than 1% of total passenger movements in 2015.
These figures show an overall stability in terms of passenger movements (positive variation of 2%) recovering the drop recorded from 2013 to 2014 in line with the positive results of the entire Med; with a great positive variation also shown in terms of ship calls (8.7% of cruise calls on 2014).

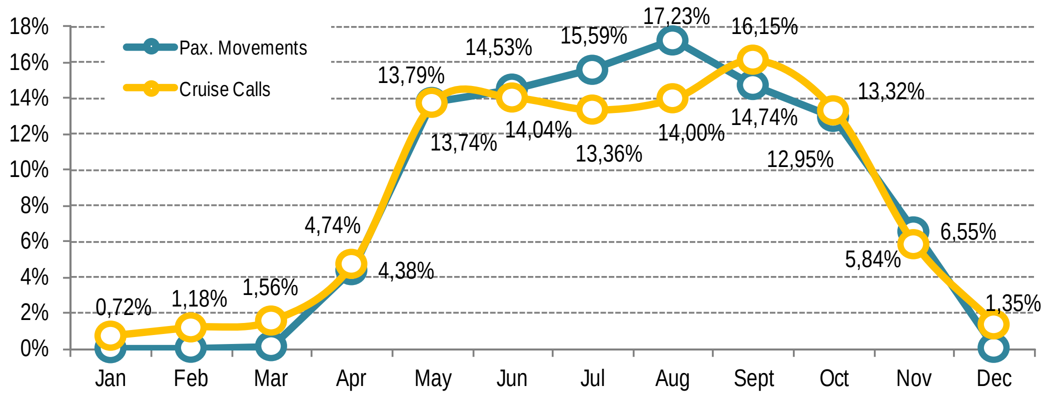
Map 3] *Percentage distribution of cruise traffic between embarks-disembarks and transits, 2015*

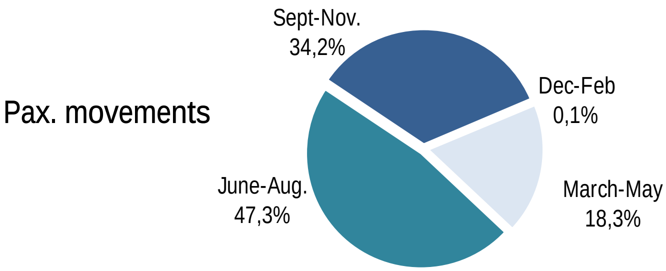


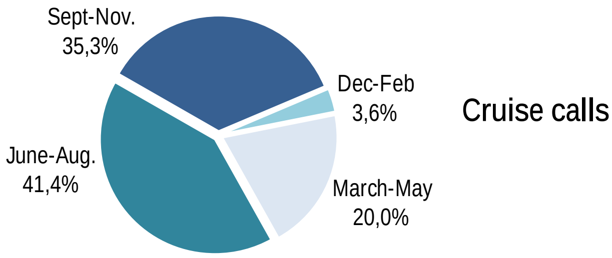
Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

Additional data relevant to analyzing traffic and dynamics is related to the main role played by a port, and distinguishing between the profile of a home port and a transit port. Among the main cruise ports listed, only Venice and Trieste have a percentage distribution with cruisers on embark and disembark outnumbering the transit ones.

Graphs 4, 5 & 6] *Monthly and trimester share of cruise passenger movements (left pie) and cruise calls (right pie) of Adriatic cruise ports, 2015*



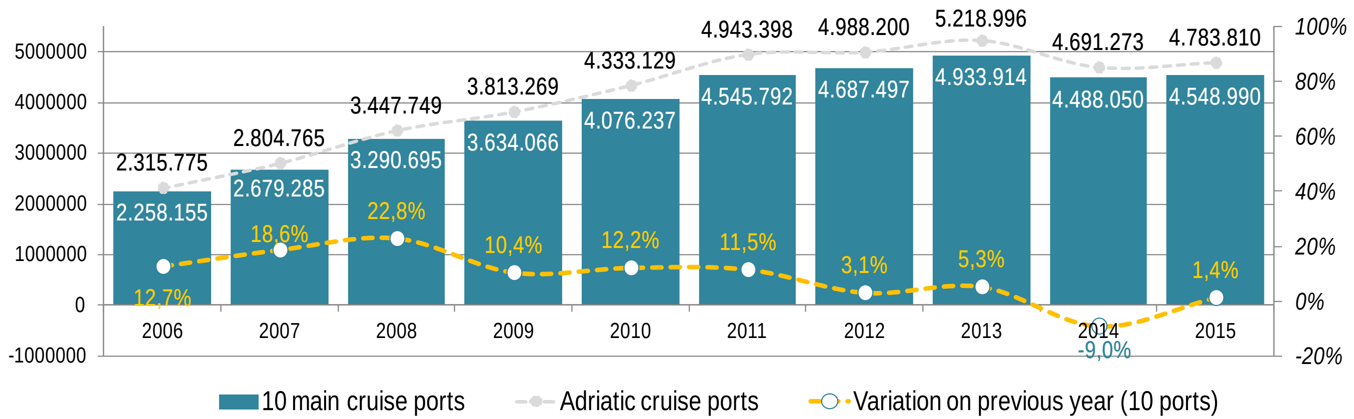




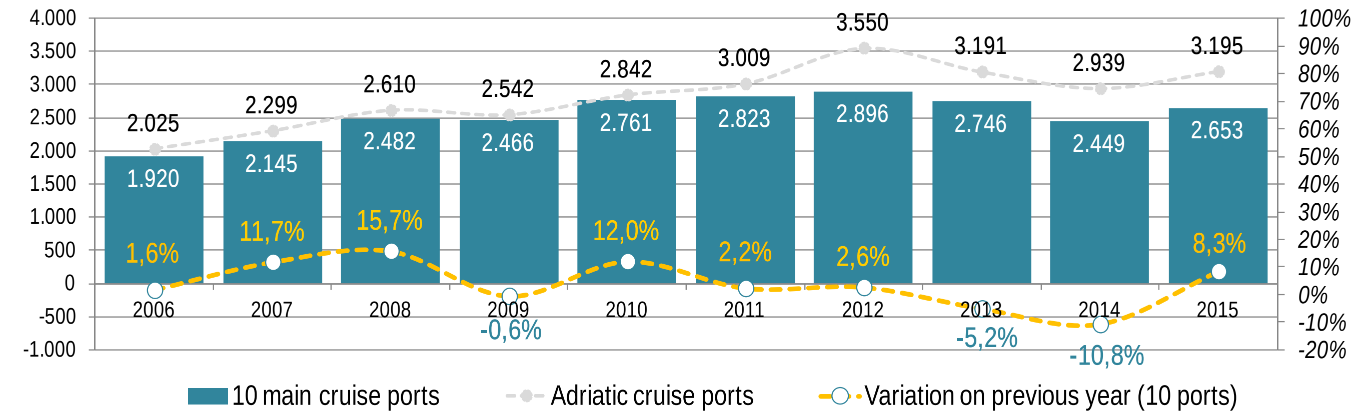
Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.
Note: among main cruise ports only Corfu, Korcula and Hvar did not provide their 2015 seasonality details.

Seasonal fluctuations of cruise passenger movements are quite similar to the cruise calls, as shown in the two series in graph 4. There are small differences in those related to the winter months, when less than 5% of cruise calls are recorded, and only 0.3% of passengers.
Cruise calls confirmed their peak in September in 2015, while passenger movements moved to August concentrating more than 17% of total traffic. Each month of the central season from May to October this never fell below 12%, with this half of the year representing more than four-fifths of the overall traffic achieved by the cruise ports that provided seasonality details.

Graph 7] *Trend of cruise passenger movements and growth rates in the main 10 and all Adriatic cruise ports, 2006-2015*



Graph 8] *Trend of cruise calls and growth rates in the main 10 and all Adriatic cruise ports, 2006-2015*



Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

The two graphs above (7 and 8), show trends in passenger movements and calls in the last decade for 10 and all Adriatic cruise ports. The orange line, which shows the variation on the previous year, remained positive - except for 2014 – during the decade 2006-2015 in terms of passenger movements, while cruise calls reveal a non-linear trend, with frequent changes in tendency, whether increasing or decreasing. In 2015, cruise calls increased after two consecutive years of decline.

Table 6] *Cruise traffic in Adriatic, forecasts for 2016 and variations on 2015*

	Pax. mov.	Calls	Variation 2016 on 2015			
	2016	2016	% Pax. mov.	% Calls	Abs. Pax	Abs. Calls
Bari	450,000	150	22.4%	2.0%	82,209	3
Brindisi	6,000	14	-96.1%	-76.7%	-145,922	-46
Dubrovnik	880,239	629	8.3%	4.3%	67,631	26
Igoumenitsa	10,738	11	247.5%	83.3%	7,648	5
Koper	70,000	65	20.9%	32.7%	12,107	16
Kotor	491,632	478	9.6%	16.3%	43,053	67
Opatija	3,392	18	158.5%	80.0%	2,080	8
Pula	6,279	15	18.7%	7.1%	991	1
Ravenna	50,000	46	25.1%	35.3%	10,036	12
Rijeka	12,000	15	32.1%	114.3%	2,918	8
Rovinj	15,593	60	stable	stable	0	5
Sibenik	12,000	100	-31.7%	8.7%	-5,562	8
Split	300,000	291	10.5%	14.0%	28,555	32
Venice	1,550,000	529	-2.1%	1.5%	-32,481	8
Trieste	160,000	58*	19.2%	28.9%	25,735	13
Zadar	120,000	120	60.7%	25.0%	45,340	24
16 Adriatic ports providing forecasts on passenger movements: +3.61% on 2015						
Ancona	n.a.	34	n.a.	41.7%	n.a.	10
Durres	n.a.	22	n.a.	83.3%	n.a.	10
Sarande	n.a.	89	n.a.	2.3%	n.a.	2
19 Adriatic ports providing forecasts on cruise calls: +8.29% on 2015						
Total forecasts 2016: 4.96 million passenger movements and 3,460 cruise calls						

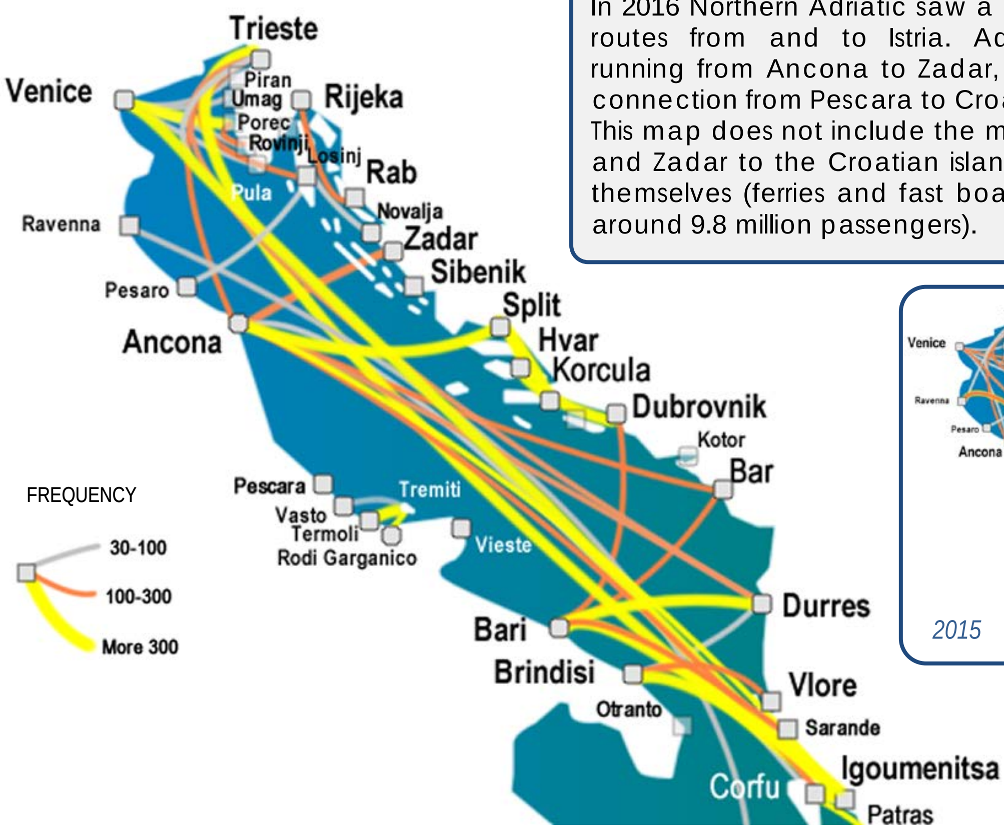
Source: Risposte Turismo (2016), Adriatic Sea Tourism Report on data provided by single ports or terminals. Notes: forecasts on passenger movements are based on 16 ports data (representing the 83.5% of the total traffic registered in 2015) while cruise calls count also on other 3 ports data for a total of 19 ports (representing the 79.3% of the total traffic registered in 2015); Corfu is among the cruise ports that did not provide 2016 forecasts: with 647,346 passenger movements in 2015, it should maintain the third place of the ranking in 2016 too; (*) one more call in Trieste will have no passengers.

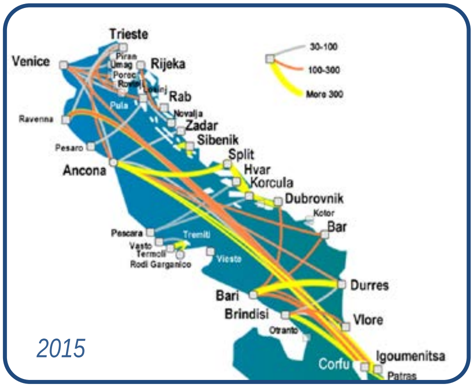
The table above reflects the latest forecasts for 2016 and variations on 2015 provided by the Adriatic cruise terminals and ports, shown both as passenger movements and cruise calls.
As some ports have been able to indicate cruise calls only, the numbers of ports taken into account are different: 16 (representing 83.5% of the total traffic in 2015) for passenger movements while 19 for cruise calls, representing a high percentage of the total. In comparison to 2015, a positive variation of passenger movements is expected, together with an even stronger increase in cruise calls.

3 FERRY, HYDROFOIL AND FAST CATAMARAN TRAFFIC

Map 4] *Main Adriatic ferry, hydrofoil and fast catamaran routes, 2016*

The map traces the main routes sailed in the Adriatic by ferries, hydrofoils and fast catamarans.
In 2016 Northern Adriatic saw a partial recovery of cyclical routes from and to Istria. Additional connections are running from Ancona to Zadar, while there is no longer a connection from Pescara to Croatia.
This map does not include the many connections from Split and Zadar to the Croatian islands, or between the islands themselves (ferries and fast boats that in 2015 accounted around 9.8 million passengers).





Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

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

	Port	Country	Traffic		Share % on total	
			Passenger movements	calls*	Passenger movements	calls
1	Split**	HR	4,378,677	13,125	25.0%	16.6%
2	Igoumenitsa	GRE	2,361,325	9,981	13.5%	12.6%
3	Zadar	HR	2,189,695	13,750	12.5%	17.4%
4	Corfu	GRE	1.479.753	13.881*	8.4%	17.5%
5	Bari	ITA	1,124,175	3,772	6.4%	4.8%
6	Ancona	ITA	970,867	2,646	5.5%	3.3%
7	Durres	ALB	774,411	1,090	4.4%	1.4%
8	Patras	GRE	552,201	1,430*	3.2%	1.6%
9	Dubrovnik	HR	529,863	5,100*	3.0%	6.4%
10	Brindisi	ITA	472,423	866	2.7%	1.1%
11	Sibenik	HR	268,969	2,819	1.5%	3.6%
12	Sarande	ALB	192,114	1,215	1.1%	1.1%
13	Rijeka	HR	136,251	658	0.8%	0.8%
14	Venezia	ITA	154.313	440*	0.9%	0.6%
15	Porec	HR	70,704	390	0.4%	0.5%
16	Montenegro***	MON	39,198	166*	0.2%	0.2%
17	Trieste	ITA	31,484	202	0.2%	0.3%
18	Rovinj	HR	31,086	231	0.2%	0.3%
19	Pula	HR	24,249	119	0.1%	0.2%
20	Rodi Garganico	ITA	16,904	204	0.1%	0.3%
	OTHER FERRY PORTS		1,729,216	7,549	9.9%	9.5%
	TOTAL		17,527,878	79,179	100%	100%

Source: Risposte Turismo (2016), Adriatic Sea Tourism Report. Data provided to Risposte Turismo directly by ports and national statistics offices. Table shows only the main 20 ports for international traffic. 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; (***) data include all the ports of Montenegro.

Table 7 lists the main 20 ferry, hydrofoil and fast catamaran Adriatic ports in terms of passenger movements. It should be noted that these kind of products are not used exclusively for tourism. In contrast to cruising - entirely for leisure purposes - many of the routes provide transport services, often public ones, to assist island residents and connect local territories, rather than responding to tourist demand. In terms of absolute values, Split is the only port that records over 4 million passenger movements, a value that is increasing year-on-year. The first 10 positions have remained almost the same as 2014 with an overall traffic equal to 17.53 million passengers. Although slightly less reliable, ferry calls are around 80,000 with Corfu leading the rankings.

Considering overall values, the Adriatic records 221 ferry calls each day of the year.

Table 8] *Main passenger transport routes in Croatia, 2015-2010; variation 2015/10 and 2015/14*

	FERRIES ROUTES	pax 2010	pax 2011	pax 2012	pax 2013	pax 2014	pax 2015	var % 15/10	var % 15/14
A	Zadar/Gaženica - Ošljak - Preko	1,657,065	1,617,167	1,606,123	1,642,286	1,645,921	1,068,266	-35.5%	-35.1%
B	Split - Supetar	1,531,933	1,538,513	1,534,340	1,598,371	1,604,776	1,745,929	14.0%	8.8%
C	Valbiska - Merag	717,058	769,177	763,515	762,526	806,316	1,025,199	43.0%	27.1%
D	Jablanac/Stinica - Mišnjak	650,000	655,620	701,912	679,858	683,677	846,193	30.2%	23.8%
E	Prizna - Žigljen	647,042	697,943	673,017	663,556	657,602	766,583	18.5%	16.6%
F	Split - Stari Grad	577,272	593,634	601,445	626,472	618,919	671,145	16.3%	8.4%
G	Brestova - Porozina	569,740	584,695	568,769	548,486	501,114	545,700	-4.2%	8.9%
H	Orebić - Dominče	457,715	477,227	486,225	482,585	496,383	592,237	29.4%	19.3%
I	Biograd - Tkon	456,103	448,198	441,862	448,096	447,500	450,875	-1.1%	0.8%
M	Drvenik - Sućuraj	262,185	272,926	269,728	283,963	293,015	348,294	32.8%	18.9%
	MAIN 10 ROUTES	7,526,113	7,655,100	7,646,936	7,736,199	7,755,223	8,060,421	7.1%	3.9%
	OTHER ROUTES	1,465,749	1,486,436	1,502,542	1,535,173	1,595,053	1,791,033	22.2%	12.3%
	TOTAL PAX	8,991,862	9,141,536	9,149,478	9,271,372	9,350,276	9,851,454	9.6%	5.4%

Source: elaboration on data provided by Agencija za obalni linijski pomorski promet (Tablice Statistika 2011-2012-2013 and 2014-2015).

Map 5] *Map of the main internal passenger transport routes in Croatia*

Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

The above table lists the main 10 Croatian ferry routes that provide regular services connecting the main islands, in order to ensure the so-called territorial contiguity. Although these should be considered a sort of sea bridges, as the islands are not connected in any other way, this traffic should also be taken into consideration, having increased over the last five years, reaching a peak in 2015 with a variation of 5.4% on the previous year and 9.6% on 2010.

The map beside shows the locations of routes along the Croatian coast.

Table 9] *Concentration of ferry, hydrofoil and fast catamaran passenger movements in Adriatic ports, 2013- 2015*

Passenger movements	first 3	first 5	first 10
2015	50.9%	65.8%	81.9%
2014	51.0%	66.3%	85.1%
2013	52.6%	68.3%	89.1%

Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

Although less in volume than cruise, traffic of this kind is strongly concentrated in the Adriatic, and in 2015 the first three ports represented around half of total passenger movements.

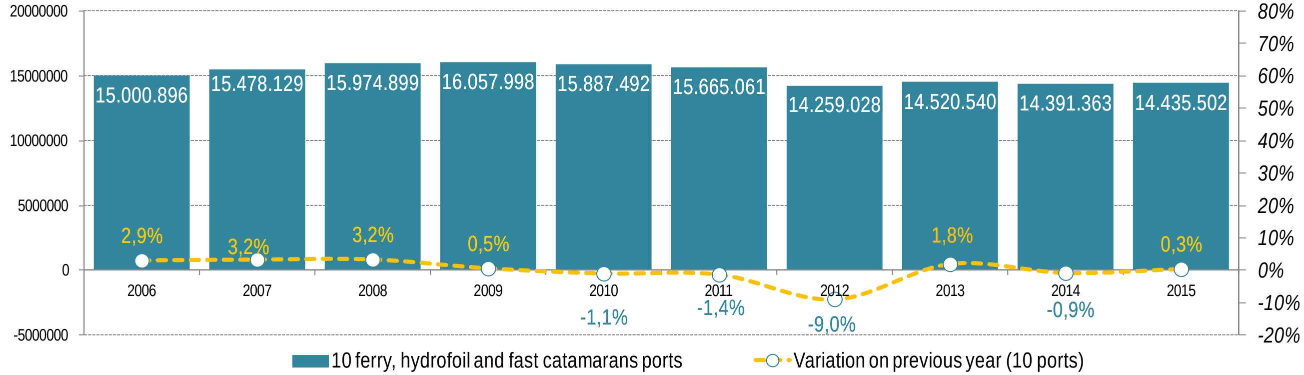
Table 10] *Ferry, hydrofoil and fast catamaran passenger movements by country, absolute values and percentage shares, 2015 and variation on 2014*

PORTS	2015*		Share % on total		2014		Variation % on 2014	
Country	Pax. mov.	Calls	Pax. mov.	Calls	Pax. mov.	Calls	Pax. mov.	Calls
CROATIA	9,308,048	43,387	53.1%	54.8%	9,052,546	45,826	2.8%	-5.3%
GREECE **	4,393,279	25,162	25.1%	31.8%	4,613,896	26,156	-4.8%	-3.8%
ITALY **	2,789,730	8,484	15.9%	10.7%	2,913,943	8,302	-4.3%	2.2%
ALBANIA*	966,525	1,980	5.5%	2.5%	938,162	1,632	3.0%	21.3%
MONTENEGRO*	39,198	166	0.2%	0.2%	42,494	180	-7.8%	-7.8%
SLOVENIA	31,098	n.a.	0.2%	n.a.	22,297	n.a.	39.5%	n.a.
BOSNIA-HERZEGOVINA	0	0	0.0%	0.0%	0	0	0	0
TOTAL	17,527,878	79,179	100%	100%	17,583,338	82,096	-0.3%	-3.6%

Source: Risposte Turismo (2016), Adriatic Sea Tourism Report. Notes: (*) where not available, some values (pax. movements or calls) were estimate with multi-year dataset trend; (**): for Italy only the Adriatic ports were considered, for Greece only Corfu, Igoumenitsa and Patras.

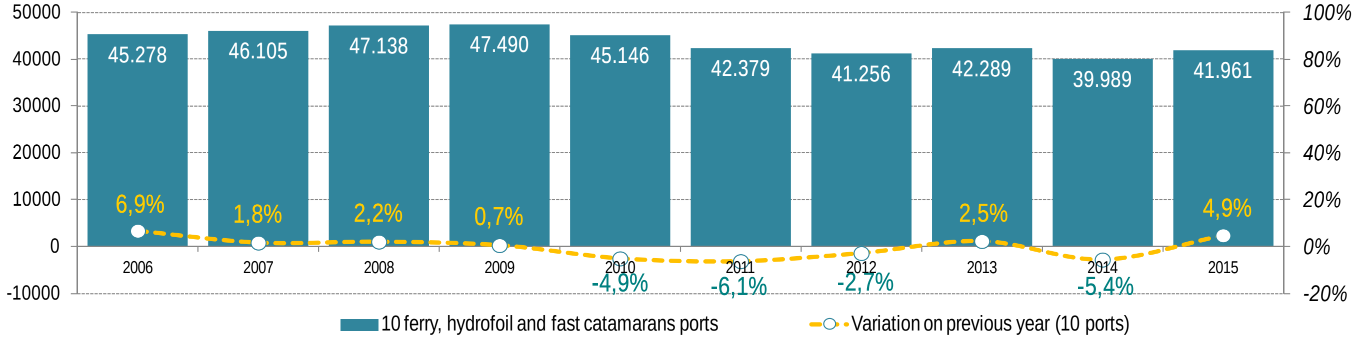
Focusing on the Adriatic countries - limited to six of them as Bosnia-Herzegovina does not host ferry, hydrofoil or fast catamaran traffic – Croatia is notably in the lead, recording around half of the total Adriatic traffic, even if only medium and long haul movements are taken into account and some short internal connections are excluded.
In the overall framework, a decline in passenger traffic (less than 1%) and ferry calls (about 3%) is shown. It is also possible to note that only Albania has achieved an increase in both passengers and calls, while Greece and Montenegro have shown a double decrease. Croatia and Italy reveal different trends however, Croatia having grown in terms of passengers and decreased in calls, while Italy has decreased in passengers but increased in calls.

Graph 9] *Trend of ferry, hydrofoil and fast catamaran passenger movements and growth rate in 10 Adriatic ports, 2006-2015*



Source: Risposte Turismo (2016), Adriatic Sea Tourism Report. Note: trend referred to 10 ports with a complete 10-year dataset (Split, Igoumenitsa, Zadar, Corfu, Bari, Ancona, Durres, Dubrovnik, Brindisi and Venice).

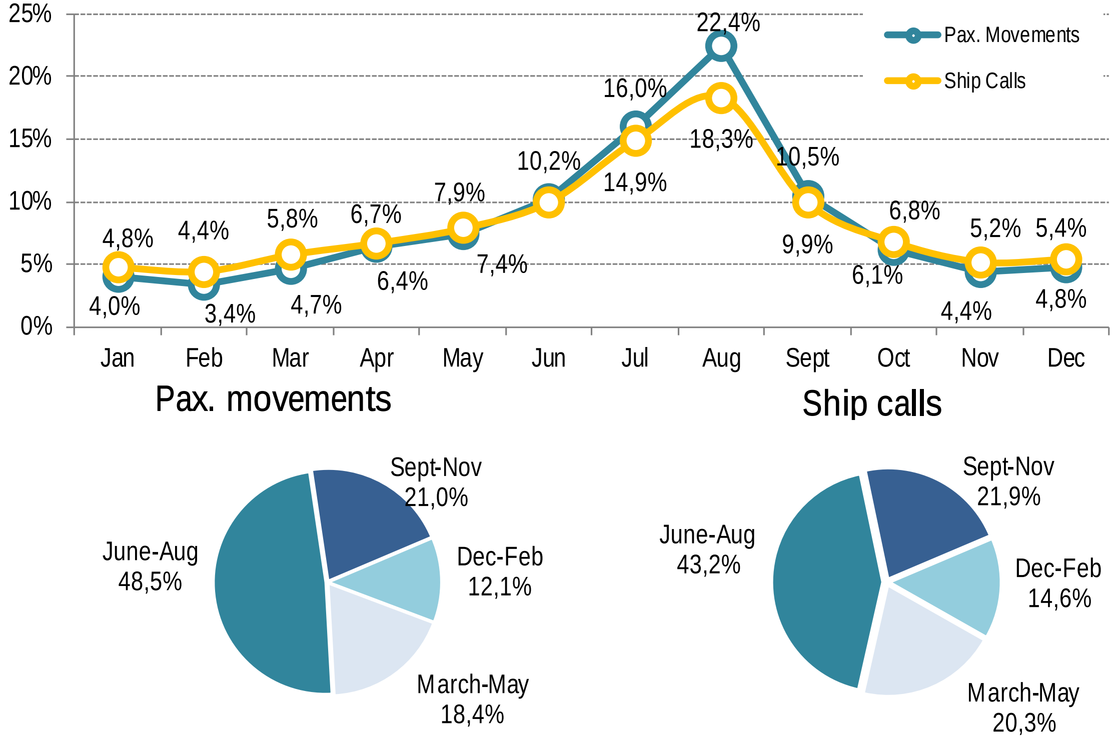
Graph 10] *Trend of ferry, hydrofoil and fast catamaran calls and growth rate in 10 Adriatic ports, 2006-2015*



Source: Risposte Turismo (2016), Adriatic Sea Tourism Report. Note: trend referred to 10 ports with a complete 10-year dataset (see graph 9 for full list).

The main ports in the Adriatic with a complete 10-year data set during the decade 2006-2015 (representing 82% of total passenger movements and 53% of ferry calls in 2015) have been analysed both in terms of passenger movements and calls, with the orange line showing the variation on the previous year. After the first four years of the decade in which both traffic variables grew, a decline can be noted from 2010 to 2012. Following a small recovery in 2013 and a drop in 2014, a new increase was recorded in 2015. These 10 ports showed a different trend compared to the whole Adriatic as the entire area experienced -0.3% and -3.6% in comparison to 2014, while the top 10 recorded respectively +0.3% and +4.9% respectively.

Graphs 11, 12 & 13] *Monthly and trimester shares of ferry, hydrofoil and fast catamaran passenger movements (left pie) and calls (right pie) in 18 Adriatic ports, 2015*



Source: Risposte Turismo (2016), Adriatic Sea Tourism Report. Note: 18 ports provided seasonality details (Ancona, Brindisi, Dubrovnik, Durres, Igoumenitsa, Pesaro, Pula, Ravenna, Rijeka, Rodi Garganico, Rovinj, Poreč, Split, Trieste, Umag, Venice, Vasto, Zadar).

The seasonality of this kind of traffic, with respect to cruises, is more pronounced for passenger movements in two particular summer months. July and August record around 40% of the total traffic for the year. The two pies show shares of traffic divided into four periods of three months each. The figures show how the summer, and in particular the two central months, lead in terms of passenger movements, although the whole year shows a slightly more balanced division of calls.

Table 11] *Ferry, hydrofoil and fast catamaran traffic in the Adriatic, forecasts for 2016 and variation on 2015*

	Pax. mov.	Calls	Variation 2016 on 2015			
	2016	2016	% Pax. mov.	% Calls	Abs. Pax	Abs. Calls
Ancona	970,867	2,646	stable	stable	stable	stable
Brindisi	472,423	866	stable	stable	stable	stable
Dubrovnik	527,000	5,100	-0.5%	stable	-2,863	stable
Durres	796,156	1,073	2.8%	-1.6%	21,745	-17
Pesaro	8,744	31	100.0%	93.8%	4,372	15
Poreč	70,704	390	stable	stable	stable	stable
Pula	24,249	119	stable	stable	0	0
Rijeka	140,000	660	2.8%	0.3%	3,749	2
Rovinj	31,086	231	stable	stable	0	0
Sibenik	290,000	2,819	7.8%	stable	21,031	0
Split*	4,480,000	13,125	2.3%	2.3%	101,323	304
Trieste	31,484	202	stable	stable	stable	stable
Venice	154,313	440	stable	stable	stable	stable
Umag/Novigrad	5,971	86	-5.0%	-5.0%	-314	-5
Zadar	2,235,000	13,770	2.1%	0.1%	45,305	20
15 Adriatic ports providing forecasts: +1.9% passenger movements and +0.8% calls on 2015						
Total forecasts 2016: 17.87 million passenger movements and 79,787 ferry calls						

Source: Risposte Turismo (2016), Adriatic Sea Tourism Report. Notes: where not available, some values (pax. movements or calls) had been estimated according to multi-year dataset or ferry scheduled ships; (*) Split data does not include tourist and small boats.

The 15 ports listed here - representing more than half of the 2015 total ferry, hydrofoil and fast catamaran traffic in the Adriatic (57.3% of passenger movements and 52.5% of ferry calls) - contributed to the analysis for the 2016 edition and provided their forecasts for the current season. The forecasts seem to confirm a positive phase continuing on from the figures recorded last year, again observing a slight increase with respect to the previous year (2016 on 2015) both in passenger movements and calls. These estimates are undoubtedly influenced by half of the 13 ports expressing stability in their traffic, both for passengers and calls. As highlighted in past editions of the Adriatic Sea Tourism Report, even an expected “stability” is not to be undervalued after years of decrease in terms of passengers for this kind of traffic.

4 SAIL AND YACHT BOAT TRAFFIC

Map 6] *Marinas and small ports in the Adriatic Sea, 2016*

Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

The mapping of marinas and small ports dedicated to nautical tourism conducted in the last few months allowed to identify more than 300 structures (327), with around 80,000 moorings (76,467) located in the Adriatic area.

Italy is the country with the largest share both in terms of berths (62%) and structures (55%).

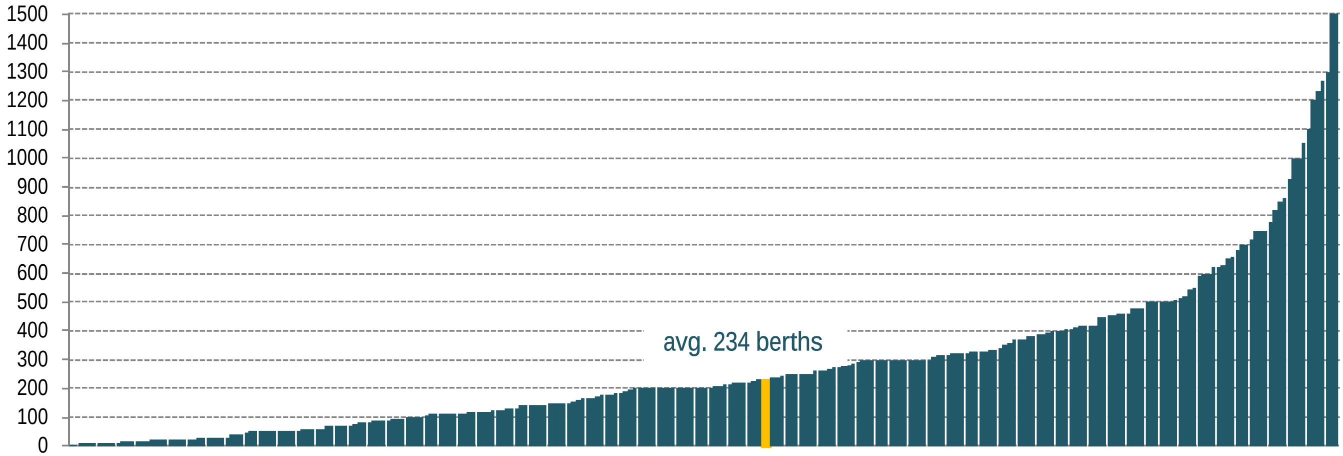
In the Adriatic Sea, the average of berths per structure is stable around 234. The Federation of Bosnia and Herzegovina remains the only country that could not count on a marina or a dedicated structure for nautical tourism.

Table 12] *Values and shares of berths and structures in Adriatic by country, 2016*

	Berths		Structures		Avg. berths per structure**
	value	% share	value	% share	
ITALY*	47,415	62.0%	180	55.0%	263
CROATIA	20,954	27.4%	130	39.8%	161
SLOVENIA	3,232	4.2%	8	2.4%	404
MONTENEGRO	2,931	3.8%	6	1.8%	488
GREECE*	1,855	2.4%	2	0.6%	927
ALBANIA	80	0.1%	1	0.3%	80
BOSNIA-H.	0	0.0%	0	0.0%	n.a.
TOTAL	76,467	100%	327	100%	234

Source: Risposte Turismo (2016), 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 14] *Distribution of the boat structures based on the number of mapped berths (vertical axis), 2015*



Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

The graph above shows the distribution of boat structures in 2016 based on the number of berths mapped in the Adriatic. The values are generally low for the large section of the graph, highlighting how small or medium in size many structures are. The largest ones (with more than 400 berths), as listed in table 13, represent more than half of the total capacity of the Adriatic Sea (54%), even if they make up only the 18% of the total structures. Two thirds of them (64%) are located in Italy.

Table 13] *Berths and shares of medium–large structures (> 400 berths), by country, 2016*

	Berths		Structure		Share on total*	
	value	% share	value	% share	berths	structure
ITALY**	24,555	59.4%	38	64.4%	32%	12%
CROATIA	9,322	22.5%	13	22.0%	12%	4%
SLOVENIA	2,809	6.8%	3	5.1%	4%	1%
GREECE**	2,800	6.8%	3	5.1%	4%	1%
MONTENEGRO	1,855	4.5%	2	3.4%	2%	1%
TOTAL	41,341	100%	59	100%	54%	18%

Source: Risposte Turismo (2016), 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, 2016*

COUNTRY	REGION	COASTLINE (KM)	BERTH/KM*	KM PER STRUCTURE*
ITALY	Puglia (Adriatic coast)	560	14	12
ITALY	Molise	35	22	18
ITALY	Abruzzo	133	17	19
ITALY	Marche	180	33	14
ITALY	Emilia Romagna	130	62	5
ITALY	Veneto	170	69	4
ITALY	Friuli Venezia Giulia	130	86	3
SLOVENIA	Karst	47	61	8
CROATIA	Istarska	539	8	36
CROATIA	Primorsko-goranska	1,065	3	97
CROATIA	Zadarska	1,082	4	19
CROATIA	Šibensko-kninska	806	5	40
CROATIA	Splitsko-dalmatinska	1,064	3	44
CROATIA	Dubrovačko-neretvanska	1,025	1	512
MONTENEGRO	Montenegro**	294	11	37
ALBANIA	Vlorë	244	1	244
GREECE	Corfu	200	6	216
GREECE	Lefkada	117	5	117

Source: Risposte Turismo (2016), 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 Durrés (62km), in Greece Epirus (200km).

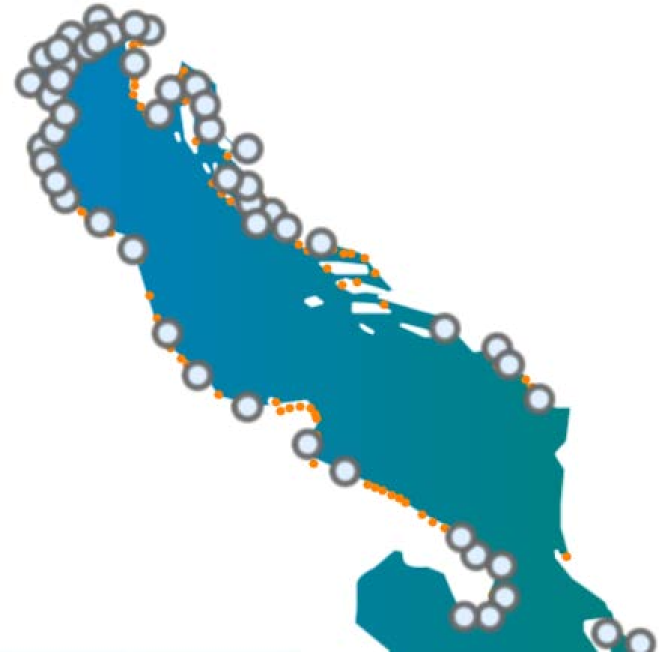
With regard to the number of berths per km of coast in the Adriatic, the table shows that Friuli Venezia Giulia can count 86 berths per km, followed by Veneto (69), Emilia Romagna (62) and Karst (61). Croatia presents lower values due to its numerous islands and the length of coastline. Taking into consideration the kilometre per structure data, it is again interesting to note that apart from Albania with only one marina located in the Vlore region, Croatia shows higher values, particularly if compared to the Italian data.

Table 15] *Berths, structures and the average of berths by structure in the Adriatic areas, 2016*

	Berths		Structures		Avg. berths* by structure
	value	% share	value	% share	
North	48,257	63.1%	206	63.0%	234
Centre	15,953	20.9%	67	20.5%	238
South	12,257	16.0%	54	16.5%	226
TOTAL	76,467	100%	327	100%	234

Source: Risposte Turismo (2016), Adriatic Sea Tourism Report. (**) Values are rounded either up or down to whole numbers

Map 7] *The sample of marinas collaborating at 2016 edition of ASTR*



Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

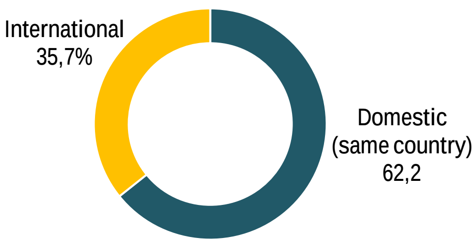
The sample of 59 structures that took part at the survey by filling in the form or were available to be interviewed around 22,000 moorings for almost 779 permanent employees in addition to 303 seasonal employees.

It is a particularly heterogeneous sample, comprising both marinas geared towards an international clientele (35.7%), and marinas mainly offering their services to a domestic or nearby resident market (almost half of their clientele being located within 100km from the structure).

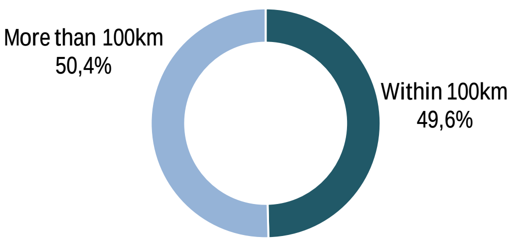
78% of the marinas affirmed to promote their activity and more than a half of them focused their promotion to the European market. Just a small share (7%) explores the worldwide market.

Graphs 15 & 16] *Comparison by place of origin of clients of the sample of marinas, 2015*

Place of origin

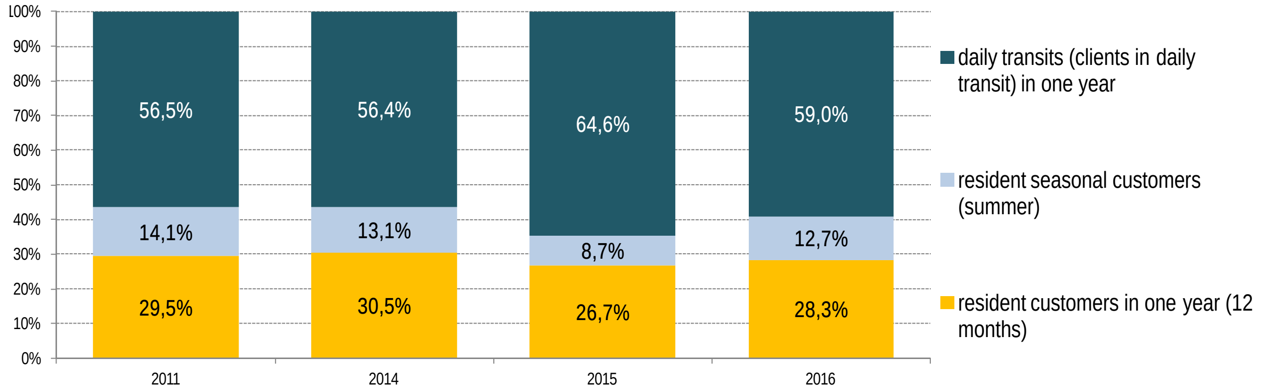


Distance from home



Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

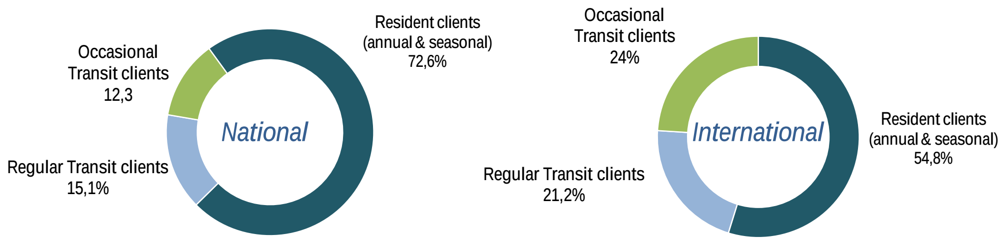
Graph 17] *Distribution of the type of clients of the sample of marinas, 2011, 2014, 2015 and forecasts, 2016*



Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

As highlighted in each of the previous editions, daily transits – meaning clients that use the boat structure facilities for only one day during the season – continue to represent the majority of demand for the sample of marinas, confirming a large phenomenon of boat movements and travels in the Adriatic. During 2015 there was a small decline in the seasonal resident customers, but for this summer season a readjustment of this data has been forecasted.

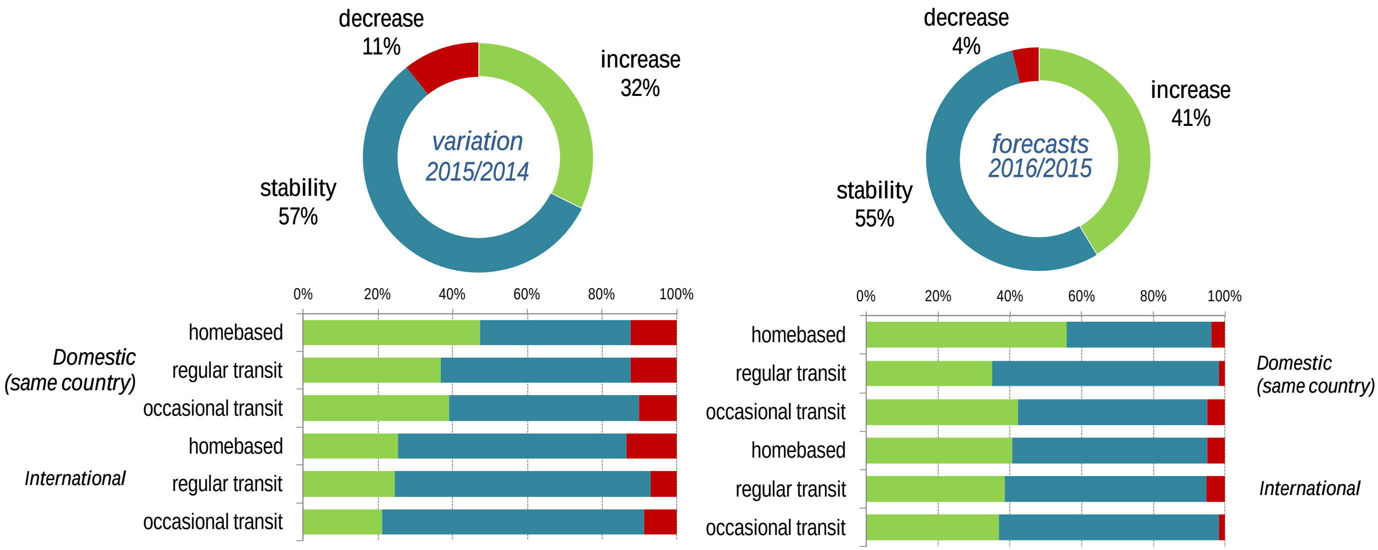
Graphs 18 & 19] *Distribution of customers of the sample of marinas by type and origin, 2015*



Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

National customers of marinas are mainly resident clients (72.6%) while occasional or regular (more than once during the season) transit clients represent half of the international demand (55.2%), a value that has decreased in recent years.

Graphs 20, 21, 22 & 23] *Variations in clientele of interviewed marinas, 2015/2014 and forecasts, 2016/2015*



Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

According to results that have emerged in the last few years and are confirmed by this edition, the number of marinas recording a variation growth of their clientele (32%) has in fact increased. This positive framework is also seen in the second two graphs with higher green columns in comparison to last year, and a reduction in red columns.

Respondents (57%) have predominantly chosen the 'stable' answer, but compared to the variation of 2014/2013 there is a significant decrease in the answered rates, indicating a fall in clientele (26% last year, 11%, as shown in graph 20, for the variation between 2015/2014).

In relation to the forecast for 2016, the growth will increase, concerning more the homebased and the occasional transit clients. It is possible to notice that the red bars of the right graph are even smaller.

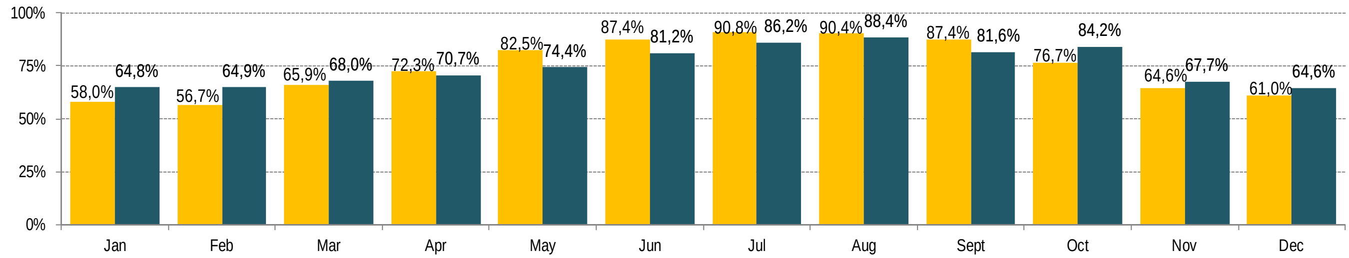
Table 16] *Number of annual and seasonal clients and daily calls of the sample, mean values and variations 2011, 2014, 2015 and forecast 2016*

	mean values				variations		
	2011	2014	2015	2016	15 on 11	15 on 14	16 on 15
Annual clients	733	693	474	693	-35.34%	-31.58%	46.19%
Seasonal clients	401	324	164	335	-59.20%	-49.55%	104.82%
Calls	1573	1452	1352	1667	-14.05%	-6.87%	23.25%

Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

Since the first edition, the Adriatic Sea Tourism Report has continued to acquire information related 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 decline during 2015, for 2016 a recovery to 2014 values is expected, with a clear increase in terms of calls and seasonal clients.

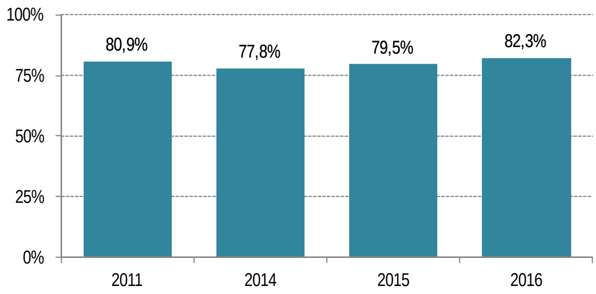
Graph 24] *Monthly occupancy rates forecasts in interviewed marinas, 2015 vs. 2014*



Source: Risposte Turismo (2016), Adriatic Sea Tourism Report and 2015 edition (for 2014 data).

The monthly occupancy rates for 2015 are quite similar in the considered period.
The graph shows only a larger occupancy at the end of the season, but in both series, even in the winter months it never fell below 56% of the total berths.
The average yearly trend is slightly increasing with an expected occupancy of 82.3% of the total berths in 2016, higher than the value of 2011 (in line with what emerges in table 16).

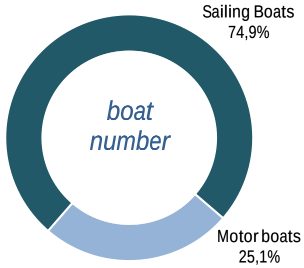
Graph 25] *Trend of occupancy rates in interviewed marinas 2011, 2014, 2015 and forecasts 2016*

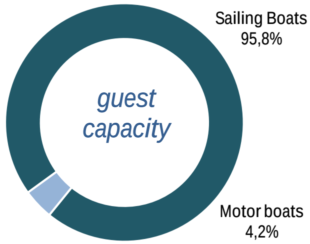


Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

Map 8] *The sample of charter companies collaborating at 2016 edition of ASTR*

Graphs 26 & 27] *Typology of boats in the sample fleet*





Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

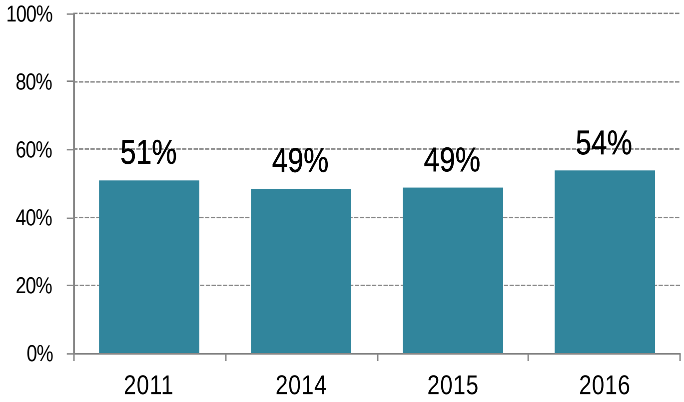
The sample of charter companies of the Adriatic Sea Tourism Report 2016 is composed of 24 organisations located in Italy, Slovenia, Croatia, Albania and Greece. These boating tourism operators have, on average, a fleet of 17 sailing boats and six motorboats and this is reflected by graphs 26 and 27.

The majority of the companies have their nautical bases on the east coast of the Adriatic Sea. Seven companies have more than one nautical base, and five of them are Croatian charter companies.

On average, eight fixed term employees work in the companies and during peak season they are helped by six seasonal workers.

Of the interviewed companies, 83% operate only in their own country, but 58% of the operators promote their services at a worldwide level, while 25% of the companies still focused promotion at European level.

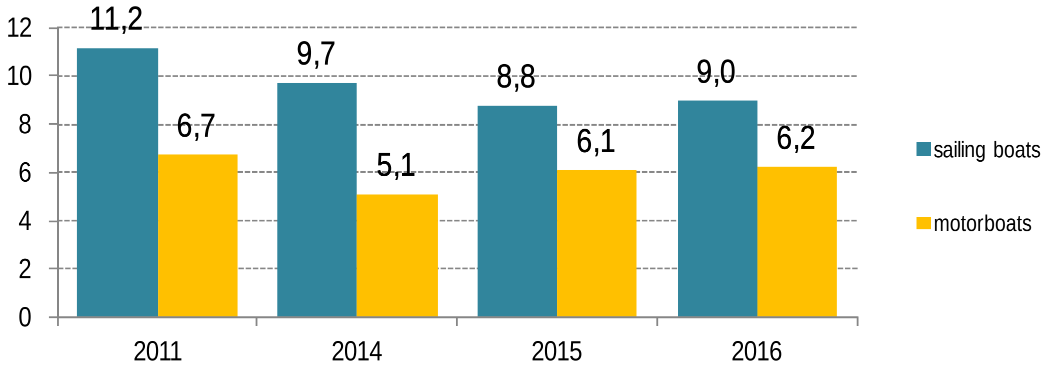
Graph 28] *Booking rates for boats of the sample charter companies fleets in 2011 and 2014-2016*



Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

With regards the operating period of the charter companies and the number of boats each one manages, the booking rates in 2016 were the highest since 2011.

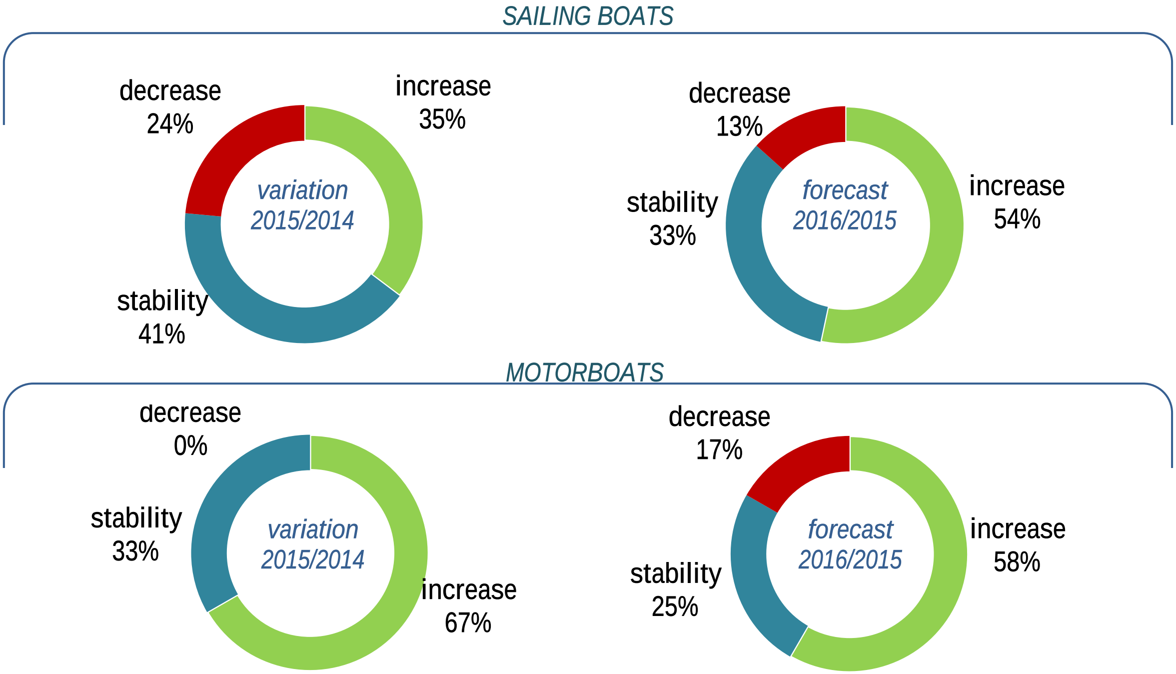
Graph 29] *Average duration of bookings for sailing and motorboats clients of the sample charter companies in 2011 and 2014-2016*



Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

The average duration of bookings is around nine days for sailing boats and six days for motorboats, still far from the values reached in 2011, when the duration was its highest in the period (overall for sailing boats). The 2016 motorboat data is almost reaching the 2011 value, while both motorboats and sailing boats are expected to be booked with similar durations to the past.

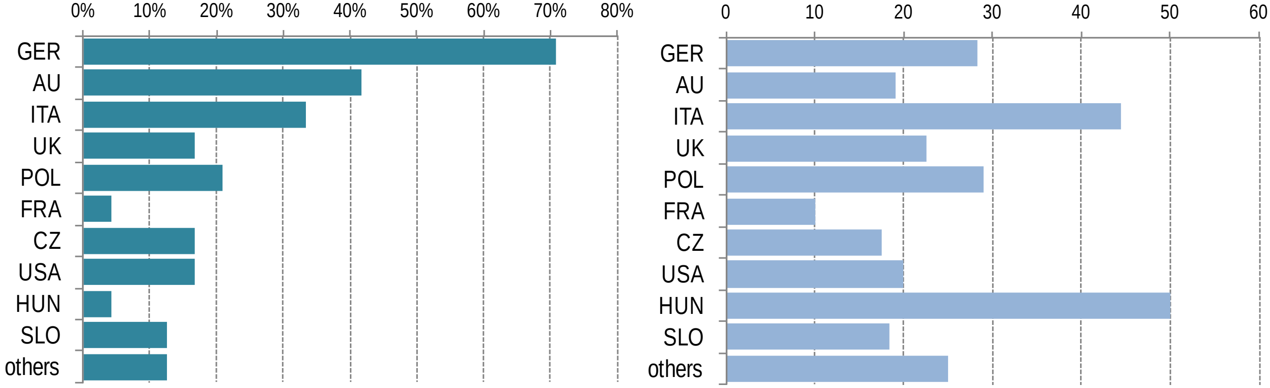
Graphs 30, 31, 32 & 33] *Variations in clientele of interviewed charter companies per type of boat, 2015/2014 and forecasts 2016 /2015*



Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

The four graphs show, for sailing and motorboats, the 2015 on 2014 variation of the clientele expressed by the sample companies, and the forecasts for the upcoming season.
Regarding boat type, there is less optimism for motorboats than sail boats even though the overall framework appears positive. In general, the outlook shows an increase always higher than the decrease.
Forecasts for the 2016 season reveal a better situation for sailing boats with clientele expected to grow by 54%. The forecasts for motorboats are more pessimistic, with a clientele drop of 17% expected between 2016 and 2015.

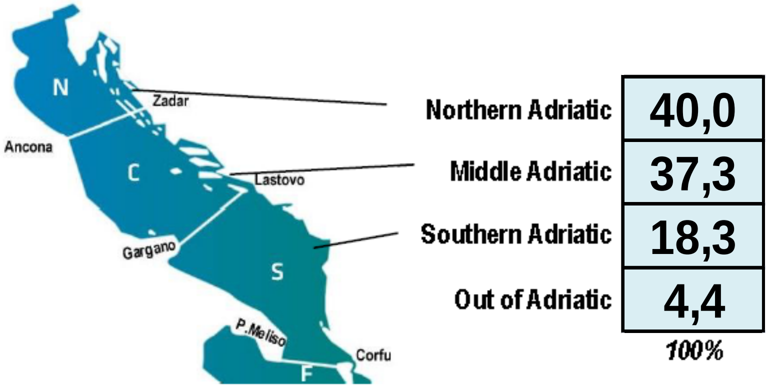
Graphs 34 & 35] *Origin countries of the customers of interviewed charter companies and their relative percentage on the overall customers, 2015*



Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

Charter companies were asked to disclose which were the main countries of origin of their customers, and the relative percentages overall. The results of the 2016 survey confirm that most markets are near the Adriatic, while also showing some changes compared to the last edition. Even with a slightly different panel it is notable that none of the interviewed companies recorded Russian clientele in the Adriatic. More than 70% of the companies among the sample cited Germany. It is interesting that for some specific markets such as Italy and Hungary, charter companies revealed a high specialisation, representing on average around half of the total clientele (the light blue column in the right graphic).

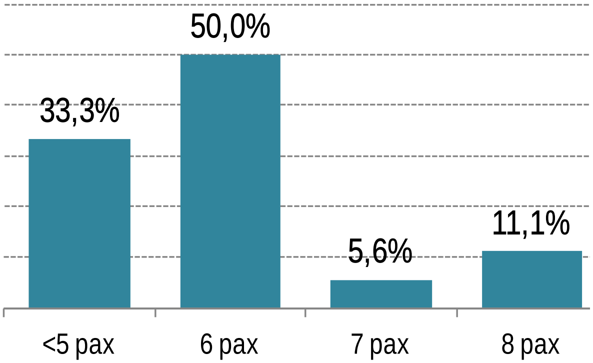
Map 9] *The distribution of the itineraries chosen by the charter companies customers among the 4 areas of the Adriatic Sea, 2015*



In previous editions, the Middle Adriatic was the most chosen area for the interviewed charter companies to develop their itineraries, but in 2015 they opted for Northern Adriatic itineraries (40%).
Southern Adriatic records the highest decrease in comparison to 2013, 2014 and 2015.

Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

Graph 36] *Most frequent occupancy of the boats of the sample charter companies, 2015*

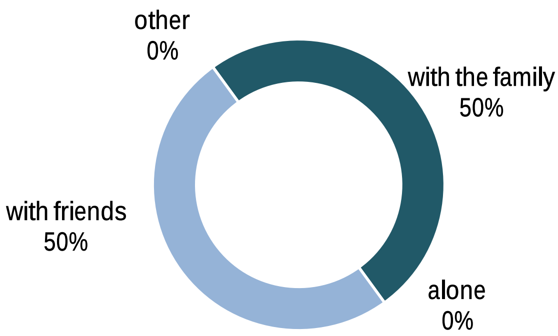


Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

In order to begin reflecting on the number of boating tourists that navigate throughout the Adriatic Sea, charter companies were asked to declare the most frequent occupancy of their boats in 2015.

The sample indicates that the range of the most frequent occupancy of boats is from a minimum of three passengers to a maximum of over eight. On average, occupancy is around 7.7 passengers per boat (it was 6.2 last year).

Graph 37] *General composition of the travel client groups of the sample charter companies, 2015*



Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

Information that could influence Adriatic tourism destinations is the kind of group that sails in chartered boats.

Although it was possible to choose among four categories, the sample chose only two of them, with the main travel groups being families and friends.

It should be noted that, according to the information provided, the percentage of clients that required a skipper fell to 13.5%, from 35% last year.

5 A COMMON FRAMEWORK FOR MARITIME TOURISM IN THE ADRIATIC SEA

Some concepts are at the base of the Adriatic Sea Forum project and its Adriatic Sea Tourism Report: the relevance and potentialities of the Adriatic as a tourist destination and the opportunity, if not the need, to consider in a combined manner the components of the so called maritime tourism - cruise, ferry and boating - so closely connected, facing similar challenges and problems with the need to reach similar goals, individually as well as collectively for an overall result for the territories and communities involved. We have already and repeatedly affirmed that the strategic plans and the definition of priorities by the governments, as well as the regional and local authorities, should start with the awareness that these traffics and touristic movements could be supported, managed and promoted through a unique vision, albeit recognising the specific peculiarities. We started recognizing how many issues and challenges the cited businesses and tourist traffics have in common: land accessibility, integrated information systems, port dredging, customers' services, relationships with the local communities, infrastructure investments, promotional activities, just to list some of them. And how many are the common results they aim to: to attract new demand, to better serve the present one, to find a profitable asset for private companies, to provide shared economic impacts for the local communities, to contribute to the employment, to stimulate the creation of new business ideas and the launch of new activities, and the list could be really longer.

As already done in the past editions, Risposte Turismo collected info to update in this report how traffics and activities are, or are not, distributed and balanced in the Adriatic regions which may have in the maritime tourism a source of economic, and not only, benefits: in Italy, Abruzzo, Emilia-Romagna, Friuli Venezia Giulia, the Marche, Molise, Puglia and the Veneto; the Krst in Slovenia; in Croatia, Dubrovačko-neretvanska, Istarska, Ličko-senjska, Primorsko Goranska, Šibensko-kninska, Splitsko-dalmatinska and Zadarska; Herzegovina in Bosnia and Herzegovina; the coastal region of Montenegro; Lezhë, Durrës and

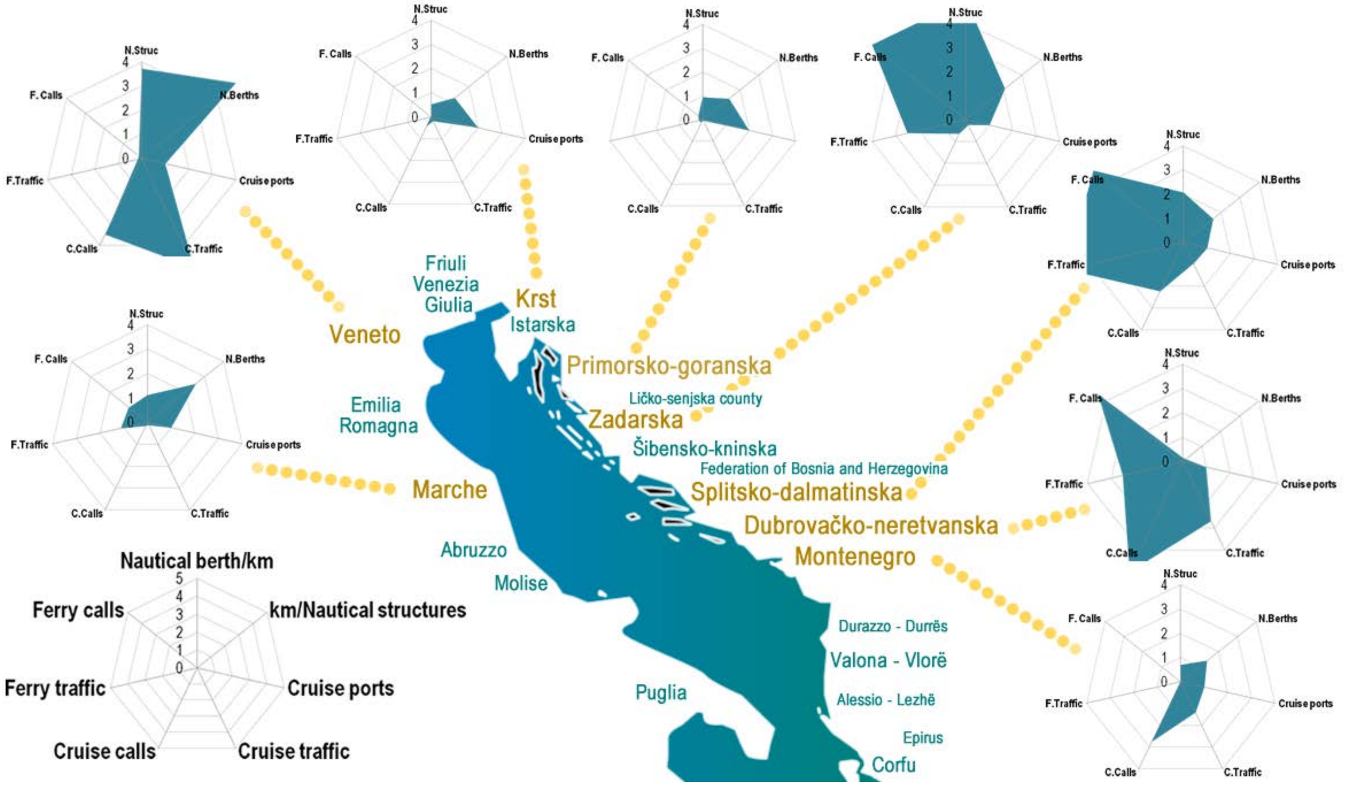
Valona in Albania; Corfu and Epirus in Greece. The table, graph and map which close the chapter and the report once again try to design a sort of Adriatic geography in terms of regional intensity of the monitored traffics. A way not just to express rankings or make comparisons but to understand where and how the whole Adriatic should address new investments, initiatives, programs and so on.

Map 10 provides a representation at a glance to help getting an idea of the more or less significant presence of maritime tourism in the Adriatic regions, positioning themselves in relation to the average values of cruise, ferry, sailing and yachting tourism traffic registered in the whole area. As for previous edition of the report, also for this one in order to draw it up 7 factors were identified in an attempt to "read and measure" cruise, ferry, sailing and yachting tourism. Factors had been calculated using some of the values previously shown: for cruise and ferry passengers traffic and the calls (demand), and for nautical tourism the number of structures and berths in the region (supply).

To get an idea of how the individual regions compete with the others but, more important, of how they may lean more toward one or two specific kinds of traffic, the following map shows eight diagrams representing some example regions in the Adriatic area. Each of the 7 previously mentioned factors had been recalculated on a scale from 0 to 5, where 5 is the value registered by the strongest Adriatic region. The diagrams in the Map aside allow easy recognition of the strengths but also the weaknesses in maritime tourism for each of the regions considered. Splitsko-dalmatinska and Zadar region are quite strong for each maritime tourism component (even if they have a low value for cruise traffic), also Dubrovnik region shows interesting results for maritime tourism with outstanding values for cruising whereas Veneto suffers from low ferry traffic. Ferry traffic which, as evident in the diagrams, was absent in 2015 in Krst, Montenegro and Istarska.

We also tried to point out few basic goals the entire community of public (on transnational, national and regional scales) and private operators should take into account and should work on. Among them: a unique information platform and database of available structures and services, useful both for industry considerations and as a demand-side research tool; a harmonised taxation policy which fully respects competition between countries avoiding harmful mutual obstacles within the area; working towards global competitiveness; investment in infrastructure to adjust supply to the requirements of present and future demand both in terms of quantity and in terms of average standards; to set up and manage an open dialogue with the local communities in order to find, share and fix common goals for a sustainable and

Map 10] *Maritime tourism intensity in 8 regions (combination of cruise, ferry, sail and yacht tourism)*



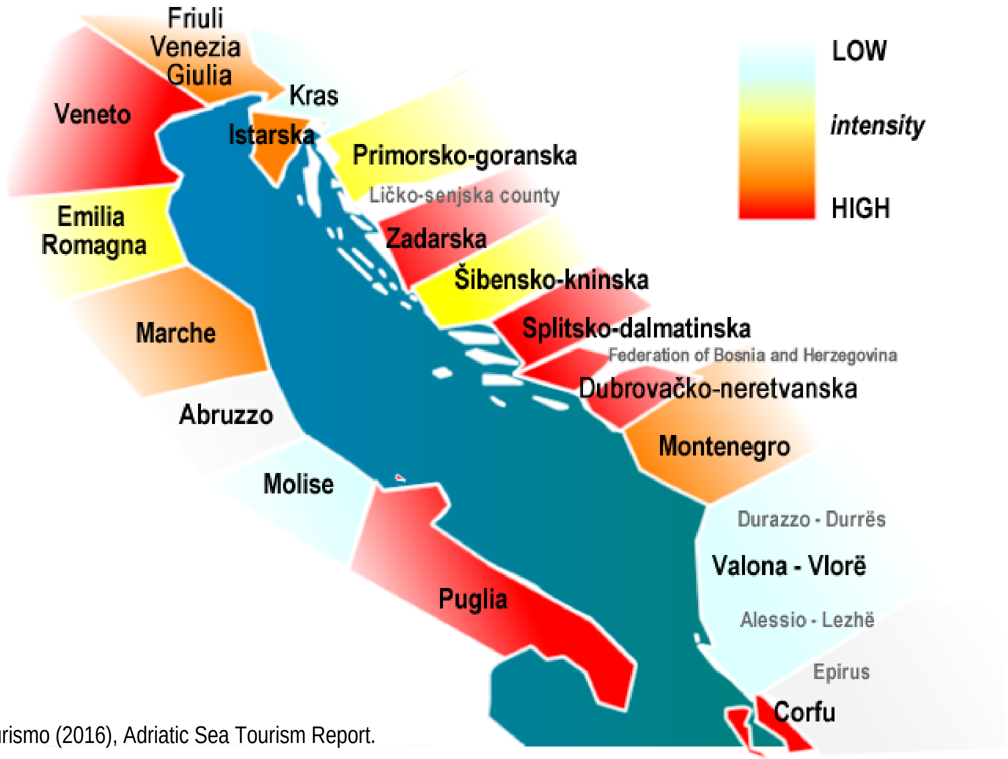
Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

good growth; an improvement of the professional skills and global knowledge the private and public companies may rely on; a strong promotional strategy to create a new awareness of the macro region as a destination especially for the potential demand outside Europe.

A common strategy and approach are necessary to address the desired improvements and to successfully compete on a global scale, but, as always, the path to agree upon which priorities should be listed, which boundary should be given to the strategy, which limitations a common action would entail to the single entities' autonomy and who should do what, is full of obstacles. The hope is first of all that the attention the EU is paying to the Adriatic-Ionian macro region will be maintained and will grow in the future, but, more

important, that will be supplied with tools, resources and concrete helps to the national governments, local authorities and private operators and companies.
At the same time, that these stakeholders will seriously adopt this common vision and approach to the development of the maritime tourism in the Adriatic, referring and addressing their investments and actions coherently with the shared idea under the conviction, and not the hope, that wider and stronger results achieved by the whole area are the insurance for their own success.

Map 11] *Maritime tourism intensity in the Adriatic regions (combination of cruise, ferry, sail and yacht tourism)*



Source: Risposte Turismo (2016), Adriatic Sea Tourism Report.

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