Adriatic Sea Tourism Report

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RISPOSTE TURISMO

Adriatic Sea Tourism Report 2014

ADRIATIC SEA TOURISM REPORT
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MARITIME TOURISM IN THE ADRIATIC SEA

This short report is dedicated to the analysis and description of maritime tourism and passenger traffic in the Adriatic Sea. It has been realised with the clear intention of making a contribution to the knowledge of tourism dynamics within the Adriatic area, with particular attention to cruise, ferry, sailing and yachting tourism.

It is the result of an extensive dialogue carried out by Risposte Turismo with many Adriatic stakeholders: ports and marinas (individual and networks), passenger terminals, charter operators, tourism companies and national institutes of statistics.

The aim is to allow all these professionals, as well as other stakeholders, to be able to count on a working tool that is updated annually. It is a report that includes useful information for all those involved in the regulation of or those who – now or in the future - operate in or have an interest in the cruise, ferry, sailing and yachting sector in the Adriatic Sea.

It should be considered to be the continuation of a course of study started with the Adriatic Sea Tourism Report 2013. The first edition of ASTR was presented last year in Trieste on the occasion of the first Adriatic Sea Forum - cruise, ferry, sail & yacht, a two-day event organised by Risposte Turismo aimed at focusing attention on an area that has a strong tourism vocation but that is also an area that is shared by seven countries and has 150 destinations.

The Adriatic is a tourism destination that still requires a considerable amount of work in order to be fully recognised, maybe in conjunction with the Ionian Sea, given that the European Union is paying particular attention to this area. It should be remembered that two other macro regional strategies in Europe (the Baltic Sea Region and the Danube Region) led the European Council in December 2012 to request the European Commission to present a new EU Strategy for the Adriatic and Ionian Region before the end of

2014 (the so called EUSAIR that covers eight countries: four EU member states - Croatia, Greece, Italy and Slovenia - and four non-EU countries - Albania, Bosnia and Herzegovina, Montenegro and Serbia).

Until now, the stakeholders' consultation on the content of the future action plan of the new strategy and the subsequent presentation and discussion of the results during a public event, has supported the preparation of the strategy. The Communication on the EU Strategy for the Adriatic and Ionian Region, accompanied by its Action Plan, has been adopted by the European Commission on 17 June last. The Action Plan have been transmitted to the other EU institutions and bodies, and they will be discussed in the Council with a view of its endorsement by the European Council during the Italian presidency (second semester of 2014). After this, the implementation period will formally kick-off.

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 the creation of jobs, by improving its attractiveness, competitiveness and connectivity, while preserving the environment and ensuring healthy and balanced marine and coastal ecosystems.

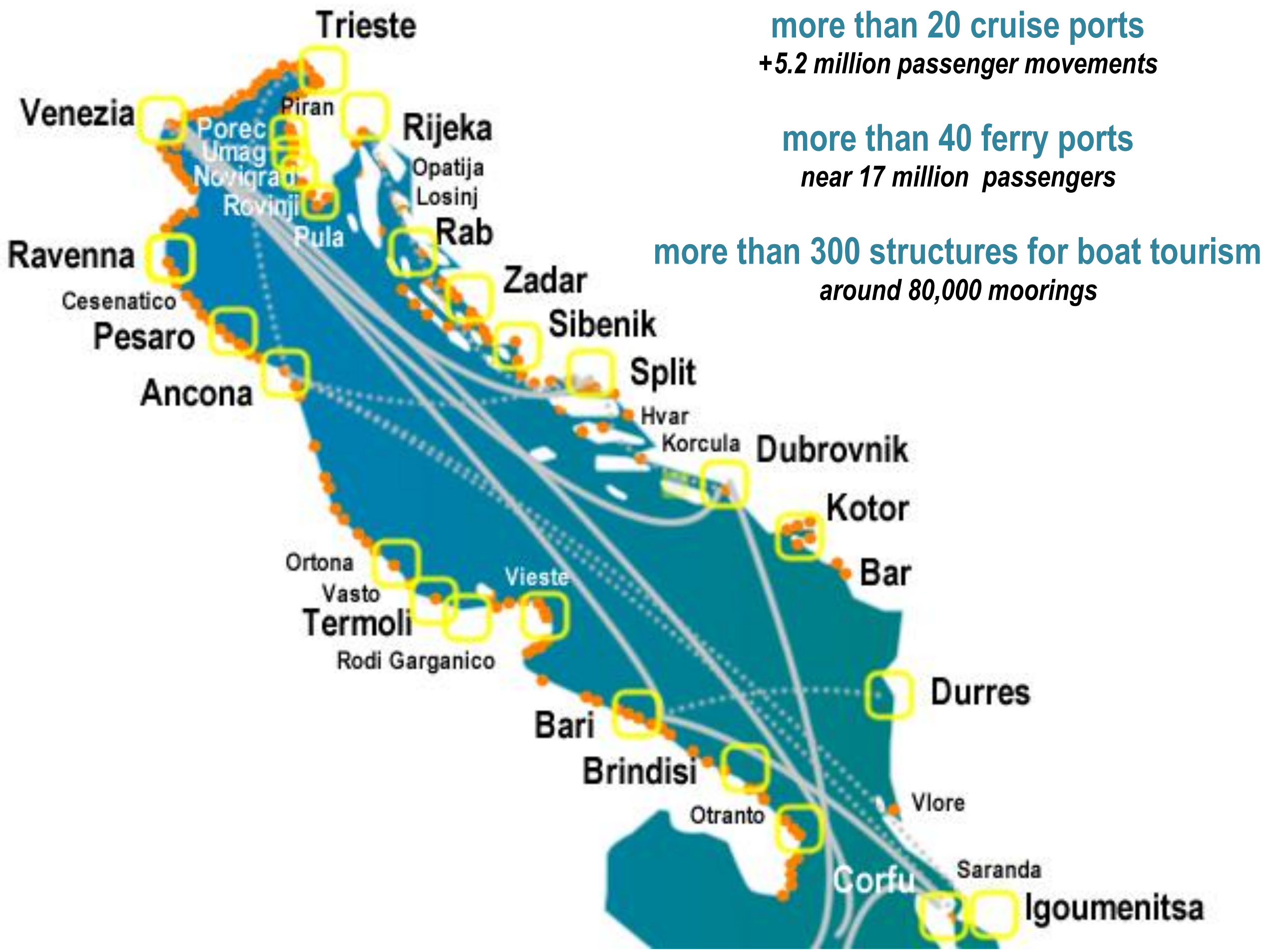
Four main pillars have been identified, focusing on different topics, among them "Driving innovative maritime and marine growth" and "Increasing regional attractiveness (tourism)". Within this framework the Adriatic Sea Tourism Report 2014 aims to be useful also to the new EU programmes or projects involving the Adriatic region as it includes updated information with which to take on maritime, tourism and transport issues.

This short report is presented in three sections dedicated to cruise, ferry, and sailing and yachting, with this introduction and final considerations to complete it. The document is mainly made up of an examination of the movement of tourists by sea, recording flows, dimensions, directions and behaviours in tables, graphs and maps. A double ad-hoc survey, addressed to marinas and charter companies, realised in the first months of 2014, completes the statistical data highlighting information related to demand and supply of nautical tourism in the Adriatic with a transnational perspective, an element that characterises the Adriatic Sea Tourism Report series.

Summarising the information in the following pages, the Adriatic has experienced intense activity in all maritime tourism dimensions. In 2013 more than 20 cruise ports recorded 5.2 million cruise passenger movements, a value that includes both cruisers in transit or embarking and disembarking operations. Nearly 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 below shows the dimensions of maritime tourism in the Adriatic Sea in 2013.

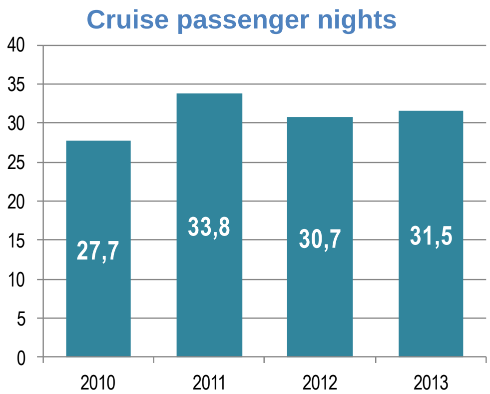
Map 1] *Maritime tourism in the Adriatic Sea in 2013 at a glance*

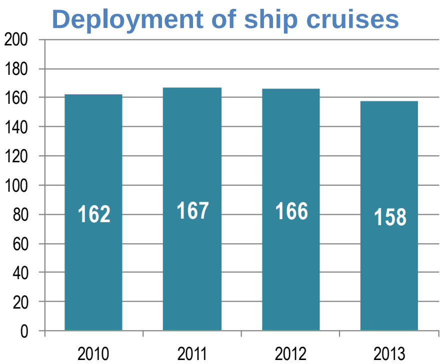


Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

CRUISE TRAFFIC

Graphs 1 & 2] *Evolution of cruise passenger-nights and deployment of ship cruises in the Mediterranean and Black Sea, 2010-2013*





Cruising is one of the many way to discover tourism destinations but also a phenomenon that showed the highest growth curve in the past decades.

Despite the recent facts (in particular related to the early 2012 season) it is still growing on a global scale reaching 21.3 million passengers in 2013 and that is forecasted to achieve another record by the end of 2014 with 21.7 million cruisers in the world.

Focusing on the Mediterranean, the area played a key role in the past decade gaining share on the total cruise beds deployed per destination, reaching the 21.7% at the end of 2013. The bars of graph 1 and 2 show an estimate of 31.5 million of nights spent on the 158 cruise ships that sailed the Med Sea in 2013.

For 2014 it is expected the redeployment of some cruise ships from the Med to other world areas, a fact that will influence also the Adriatic.

Source: G.P. Wild International (2014). “Regional Cruise Market Report; Mediterranean and Northern Europe 2013”, appeared in MedCruise (2014) “Cruise Activities in Medcruise ports”, Athens.

Table 1] *Cruise passenger traffic in the 4 macro areas of the Mediterranean, share percentages, 2009-2013*

Region	2013	2012	% Variation 2013 on 2012	2011	2010	2009	% Variation 2013 on 2009
WEST MED	18,832,657	18,315,662	*2.8%*	18,889,267	17,238,845	15,372,152	*22.5%*
ADRIATIC	5,118,126	4,819,443	*6.2%*	4,730,153	4,111,186	3,687,208	*38.8%*
EAST MED	2,856,161	2,632,912	*8.5%*	3,116,337	2,568,771	2,681,229	*6.5%*
BLACK SEA	213,840	157,619	*35.7%*	138,679	134,869	101,543	*110.6%*
Total	**27,020,784**	**25,925,636**	***4.2%***	**26,874,436**	**24,053,671**	**21,842,132**	***23.7%***

Source: MedCruise (2014), "Cruise Activities in MedCruise ports", Athens. 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.

Table 2] *Cruise calls in the 4 macro areas of the Mediterranean, share percentages, 2009-2013*

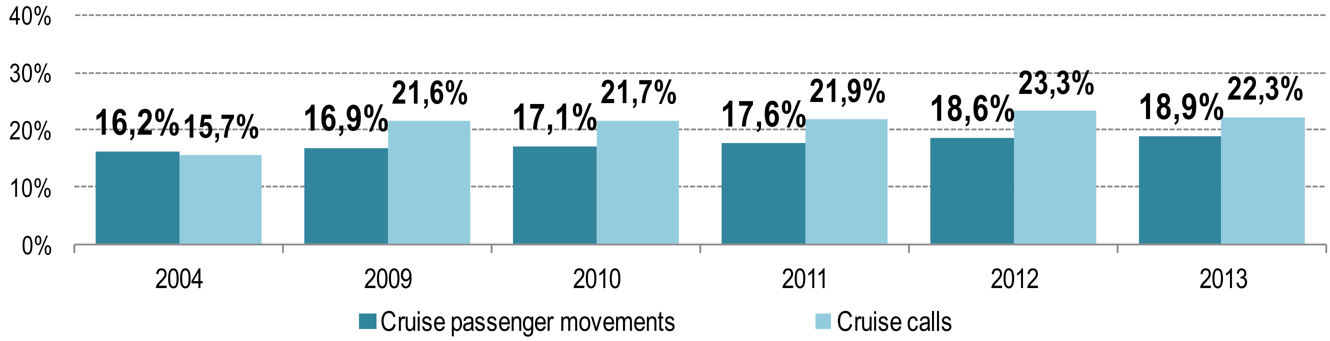
Region	2013	2012	% Variation 2013 on 2012	2011	2010	2009	% Variation 2013 on 2009
WEST MED	8,807	8,414	*4.7%*	8,431	8,403	8,001	*10.1%*
ADRIATIC	3,219	3,234	*-0.5%*	3,230	3,075	2,919	*10.3%*
EAST MED	1,983	1,985	*-0.1%*	2,509	2,239	2,435	*-18.6%*
BLACK SEA	419	270	*55.2%*	324	277	183	*128.9%*
Total	**14,428**	**13,903**	***3.8%***	**14,494**	**13,994**	**13,538**	***6.6%***

Source: MedCruise (2014), "Cruise Activities in MedCruise ports", Athens. 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.

Cruise companies operating in the Mediterranean have the chance to define their itineraries among more than 100 cruise ports, with some of them which have just appeared on the map thanks to new investments in facilities for ships and passengers and/or to the ability of cruise operators to find new alternatives. It is evident the growth of the Mediterranean (around 4%) both in terms of passenger movements and cruise calls of 2013 on 2012, getting approximately back to 2011 values. Considering the past 5 years the variation 2013 on 2009 is higher in terms of passenger movements (+23.7%) but consistent also in terms of cruise calls (6.6%).

Dividing the Med into 4 macro areas that are listed in table 1 and 2, the Adriatic is part of this growth revealing a negative figure only in cruise ship calls variation 2013 on 2012, although still positive looking back to 2009 (+10%).

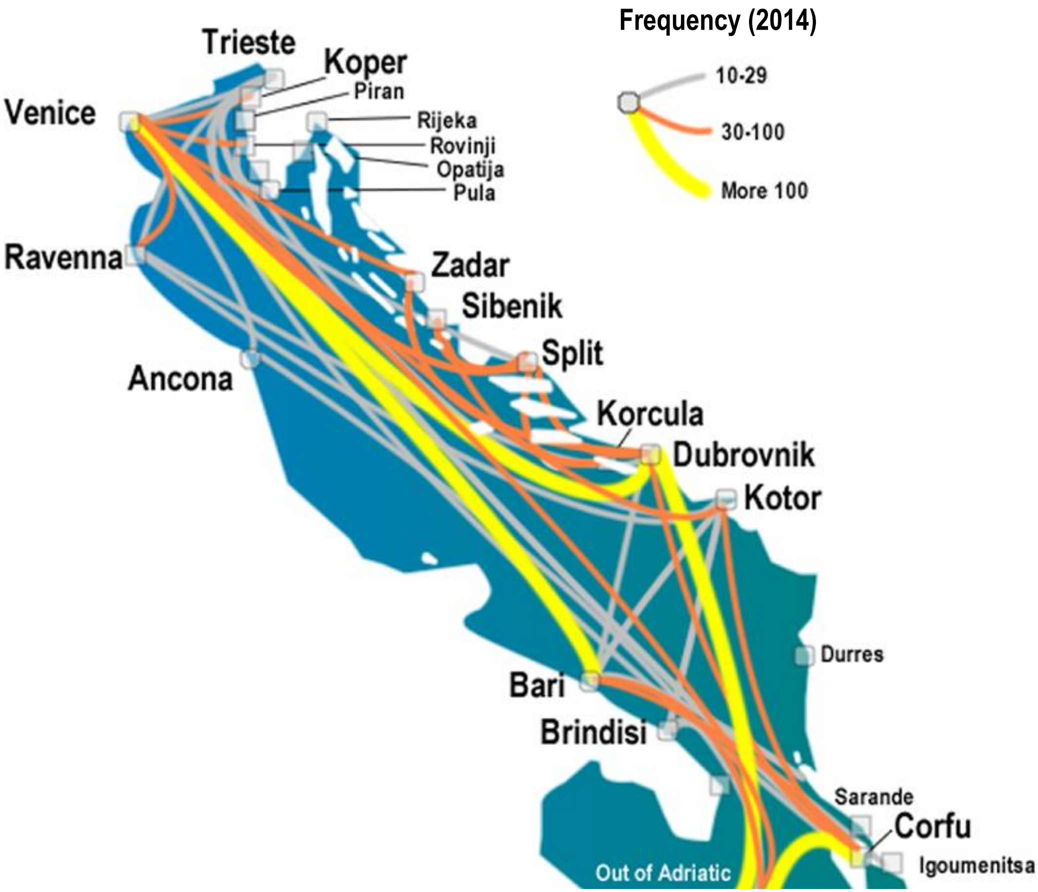
Graph 3] *Adriatic cruise passenger movements and cruise calls share of the Mediterranean 2004 and 2009-2013*



Source: MedCruise (2014), MedCruise 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.

The Adriatic Sea role in the Mediterranean geography of cruising registered an increase of importance. This is particularly evident in relation to 10 years ago in terms of share on the entire Med. Adriatic cruise passenger movements represent in 2013 the 22,3% of overall traffic while 18,9% in terms of cruise calls.

Map 2] *Main cruise routes in the Adriatic Sea, 2014*



Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

In the Adriatic sea the main cruise routes involve the ports of Venice, Dubrovnik, Corfu and Bari but there is a branched net of connection among all Adriatic cruise ports revealing different options of itinerary sailed by cruise companies.

Table 3] *The main 20 cruise ports of the Adriatic and overall traffic, absolute values and percentages, 2013*

	Cruise port	Country	Cruise traffic		Share % on total	
			passenger movements	calls	passenger movements	calls
1	VENICE	ITA	1,815,823	548	34.8%	17.2%
2	DUBROVNIK	HR	1,086,925	692	20.8%	21.7%
3	CORFU	GRE	744,651	480	14.3%	15.0%
4	BARI	ITA	604,781	171	11.6%	5.4%
5	KOTOR	MON	317,746	387	6.1%	12.1%
6	SPLIT	HR	189,107	225	3.6%	7.1%
7	ANCONA	ITA	109,492	68	2.1%	2.1%
8	RAVENNA	ITA	97,041	74	1.9%	2.3%
9	TRIESTE	ITA	70,244	32	1.3%	1.0%
10	KOPER	SLO	65,434	54	1.3%	1.7%
11	ZADAR	HR	34,575	69	0.7%	2.2%
12	SIBENIK	HR	29,784	100	0.6%	3.1%
13	KORCULA	HR	24,786	151	0.5%	4.7%
14	ROVINJI	HR	8,889	59	0.2%	1.8%
15	IGOUMENITSA	GRE	4,650	14	<0.1%	0.4%
16	BRINDISI	ITA	4,628	15	<0.1%	0.5%
17	PULA	HR	4,541	20	<0.1%	0.6%
18	OPATIJA	HR	2,280	15	<0.1%	0.5%
19	PIRAN	SLO	2,154	12	<0.1%	0.4%
20	OTRANTO	ITA	780	4	<0.1%	<0.1%
	TOTAL		**5,218,996**	**3,191**	**100%**	**100%**

Source: Risposte Turismo (2014), Adriatic Sea Tourism Report. Note: the Albanian cruise ports (mainly Durres and Saranda) data for 2013 were not available at the time of the publication.

Venice leads, with more than 1.8 million passenger movements, the table 3 that lists the main 20 cruise ports of the Adriatic, being also in the world top 10. Dubrovnik, second in terms of passengers, leads for cruise calls. The first 10 positions remained the same as 2012 with a total traffic in Adriatic that overtakes the 5 million (5.22) achieved with nearly 3,200 cruise calls.

Table 4] *Concentration of cruise passenger movements in Adriatic ports, 2012-2013*

Passenger movements	first 3	first 5	first 10
2013	69.9%	87.6%	97.7%
2012	68.3%	85.7%	97.5%

Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

In 2013 concentration related to passenger movements slightly increased from 2012 values. Corresponding figures for cruise calls have a similar trend but with lower values (54% of the calls in the first 3 ports).

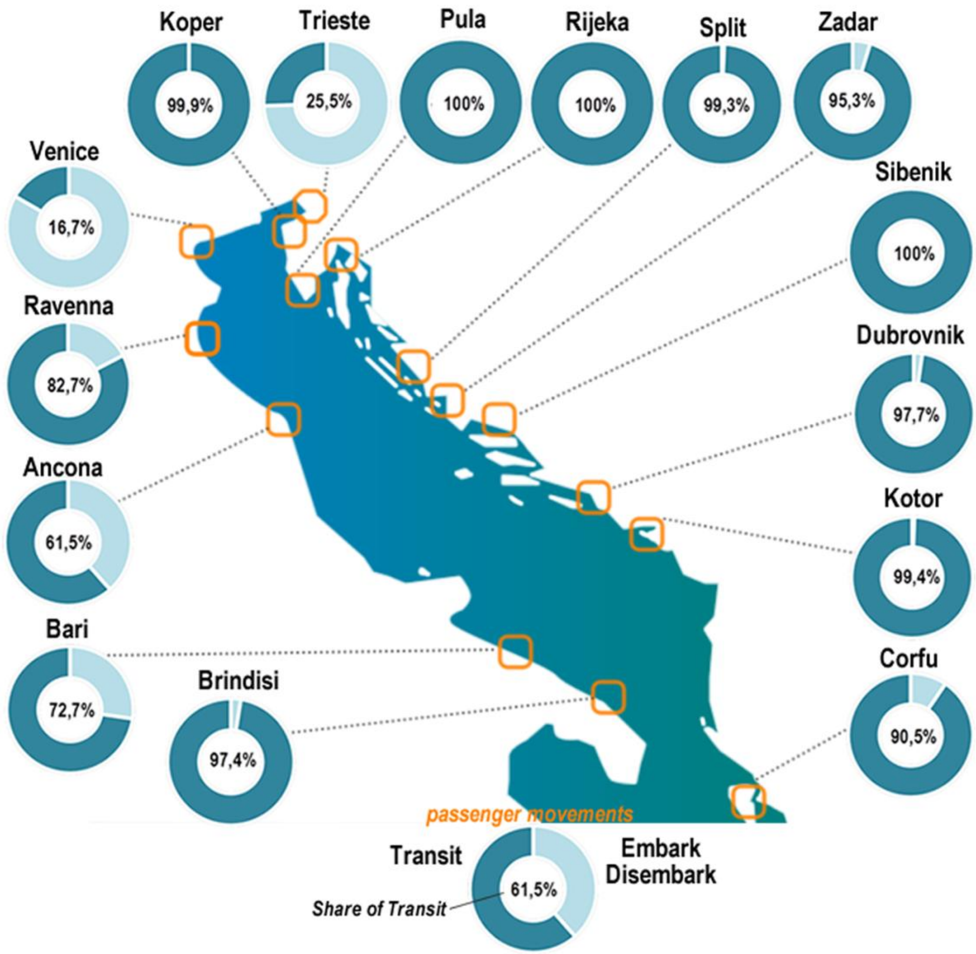
Table 5] *Cruise traffic by country, absolute values and share percentages, 2013*

PORTS	2013		Share % on total		2012		Variation % on 2012	
Country	Pax. mov.	Calls	Pax. mov.	Calls	Pax. mov.	Calls	Pax. mov.	Calls
ITALY*	2,702,789	912	51.8%	28.6%	2,691,415	1,074	0.4%	-15.1%
CROATIA	1,381,572	1,332	26.5%	41.7%	1,326,955	1,365	4.1%	-2.4%
GREECE*	749,301	494	14.3%	15.5%	657,591	489	13.9%	1.0%
MONTENEGRO	317,746	387	6.1%	12.1%	246,623	343	28.8%	12.8%
SLOVENIA	67,588	66	1.3%	2.1%	65,616	56	3.0%	17.9%
ALBANIA	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
BOSNIA-HERZEGOVINA	0	0	0.0%	0.0%	0	0	0	0
TOTAL 2013	**5,218,996**	**3,191**	**100%**	**100%**	**4,988,200**	**3,327**	**4.6%**	**-4.1%**

Source: Risposte Turismo (2014), Adriatic Sea Tourism Report. Note (*): both for Italy and Greece, only their Adriatic ports are considered. The Albanian cruise ports (mainly Durres and Saranda) data for 2013 were not available at the time of the publication.

The two main countries (that represent four-fifths of the whole Adriatic Sea) show different trends, but both are the ones that, in the considered area, had lost cruise ship calls on 2012. Italy recorded in 2013 an evident decrease in cruise ship calls, due in particular to less calls in Venice, Bari and Brindisi, although balanced by a stability in terms of passenger movements. With regards to Croatia, beside some decreasing ports others showed a growth in 2013 on 2012 and this reflects to an overall passenger movements growth of 4%.
The increase of cruise traffic in Montenegro continues steadily with a growth of passengers of 29%.
These figures show an overall growth of passenger movements (+4.6%) and a negative variation (-4.1%) in terms of ship calls. This reveals the use of larger cruise ships in these ports as well as an increment in embark and disembark operations able to generate more passenger movements for each cruise call (the average raised from the 1,499 passenger movements per call in 2012 to 1,635 in 2013).

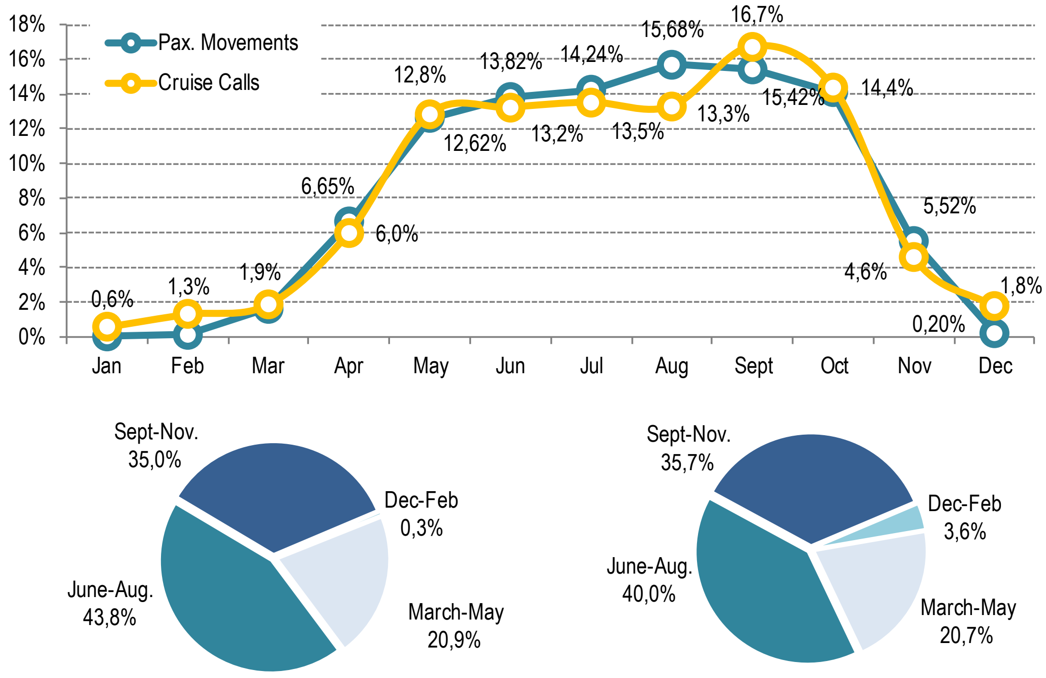
Map 3] *Percentage distribution of cruise traffic between embarks-disembarks and transits, 2013*



Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

Among the 15 main cruise ports detailed, only Venice and Trieste have a percentage distribution with cruisers on embark and disembark outnumbering the transit ones.

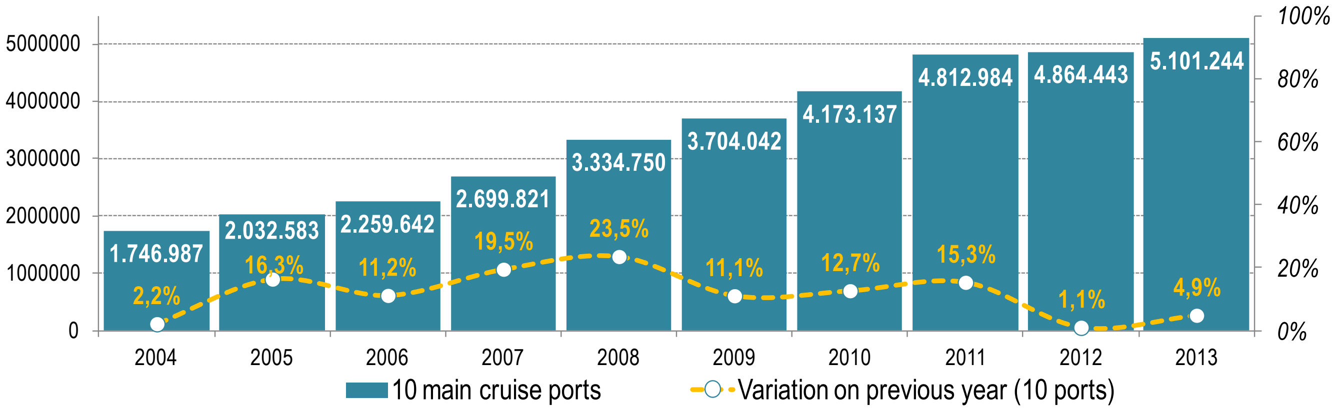
Graphs 4, 5 & 6] *Monthly and trimester share of cruise passenger movements (left pie) and cruise calls (right pie) of 20 Adriatic cruise ports, 2013*



Source: Risposte Turismo (2014), Adriatic Sea Tourism Report. Note: 20 cruise ports provided seasonality details (Ancona, Bari, Brindisi, Corfu, Dubrovnik, Igoumenitsa, Koper, Korcula, Kotor, Opatija, Otranto, Pula, Ravenna, Rijeka, Rovinji, Sibenik, Split, Trieste, Venice, Zadar).

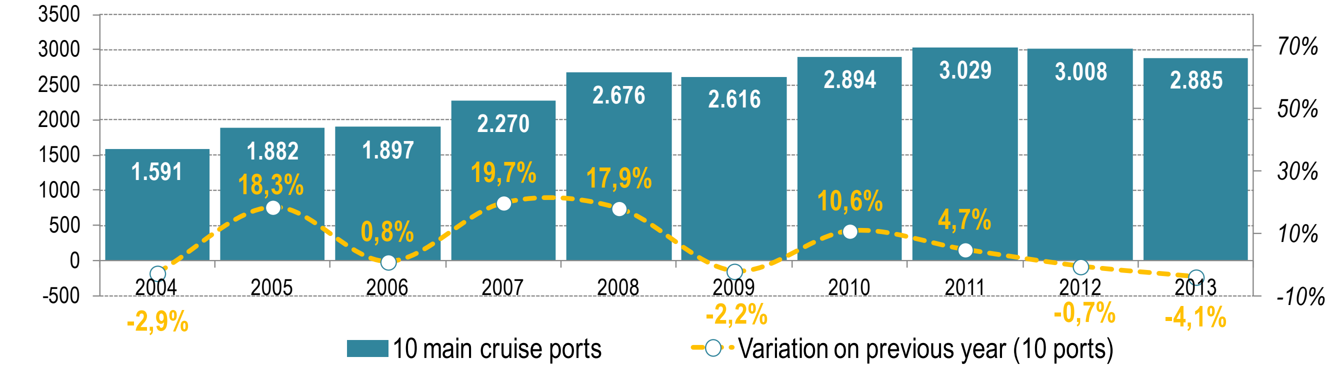
Seasonal fluctuations of cruise passenger movements are quite similar than the cruise calls as showed in the two series of graph 4. Small differences are related to the winter months when it is registered the 3.7% of cruise calls while only the 0.3% of passengers.
Monthly peak of passenger movements is in August while cruise calls highest month is September. Each month of the central season from May to October never fall down the 12% with this half of the year representing four-fifths of the overall traffic achieved by the 20 cruise ports that provided seasonality details.

Graph 7] *Trend in cruise passenger movements and growth rates in the main 10 Adriatic cruise ports, 2004-2013*



Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

Graph 8] *Trend of cruise calls and growth rates in the main 10 Adriatic cruise ports, 2004-2013*



Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

The two graphs above (7 and 8) show trend in passenger movements and calls in the last decade for the 10 main Adriatic cruise ports. While the orange line, that expresses the variation on previous year, is always positive during all the decade 2004-2013 in terms of passenger movements, the cruise calls reveals a non-linear trend, with frequent changes in tendency, increasing or decreasing.

Table 6] *Cruise traffic in Adriatic, forecast for 2014 and variations on 2013*

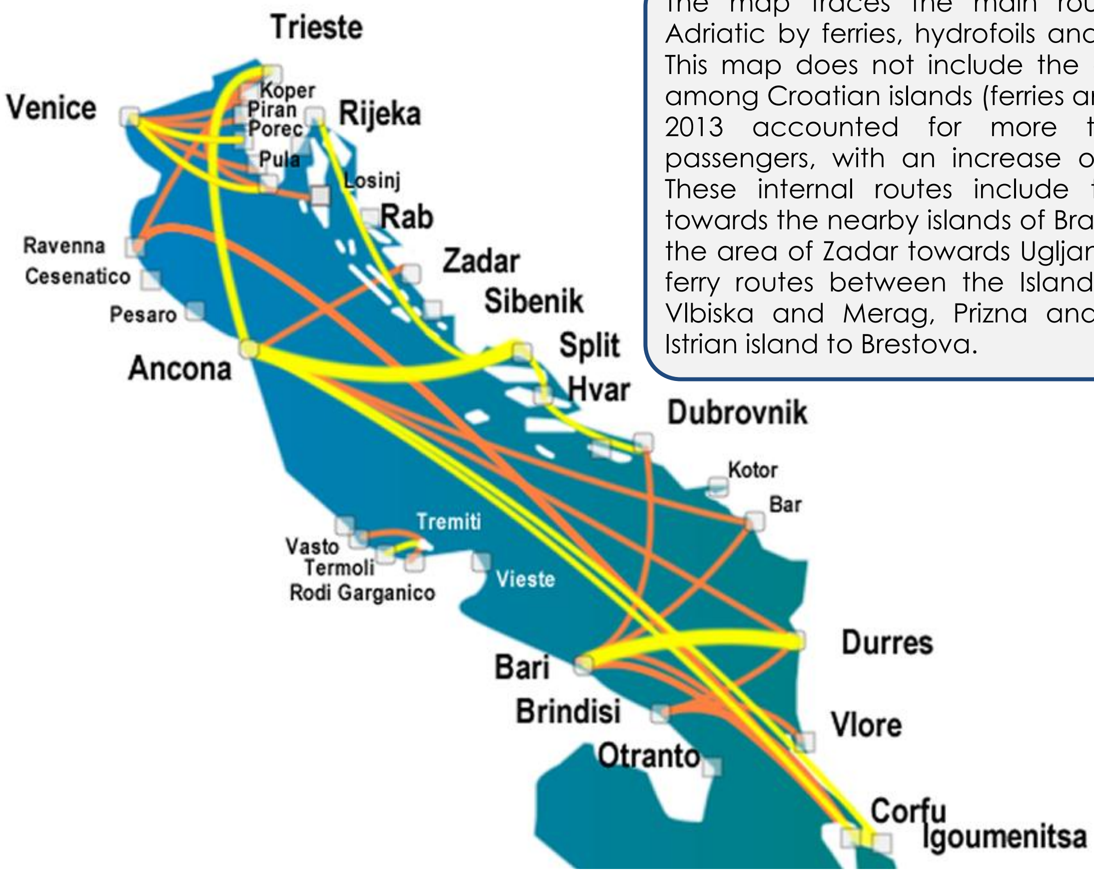
	Pax. mov.	Calls	Variation 2014 on 2013				2013	
	2014	2014	% Pax. mov.	% Calls	Abs. Pax	Abs. Calls	Pax. mov.	Calls
Ancona	40,000	25	-64%	-63%	-69,492	-43	109,492	68
Brindisi	20,000	23	332%	53%	-5,372	-+	4,628	15
Corfu	634,735	381	-15%	-21%	-109,916	-99	744,651	480
Dubrovnik	907,542	542	-17%	-22%	-179,383	-150	1,086,925	692
Koper	65,434	55	stable	2%	0	+1	65,434	54
Opatija	1,790	15	-21%	0%	-490	0	2,280	15
Pula	3,200	17	-30%	-15%	-1,341	-3	4,541	20
Ravenna	44,000	40	-55%	-46%	-53,041	-34	97,041	74
Trieste	47,700	20	-38%	-34%	-22,544	-12	70,244	32
Venice	1,696,000	491	-7%	-10%	-119,823	-57	1,815,823	548
Zadar	52,000	75	50%	9%	+17,425	+6	34,575	69
11 Adriatic ports providing forecast on passenger movements: -13.0% on 2013								
Bari	n.a.	150	n.a.	-12.3%	n.a.	-21	604,781	171
Igoumenitsa	n.a.	7	n.a.	-50.0%	n.a.	-7	4,650	14
Kotor	n.a.	365	n.a.	-5.7%	n.a.	-22	317,746	387
Rijeka	n.a.	2	n.a.	+100%	n.a.	+1	685	1
Sibenik	n.a.	100	n.a.	stable	n.a.	0	29,784	100
Split	n.a.	232	n.a.	+3.1%	n.a.	+7	189,107	225
17 Adriatic ports providing forecast on cruise calls: -14.3% on 2013								

Source: Risposte Turismo (2014), Adriatic Sea Tourism Report on data provided by single ports or terminals. Note: forecasts on passenger movements are based on 11 ports data (representing the 75.2% of the total traffic registered in 2013) while cruise calls also on other 6 ports data for a total of 17 ports (representing the 92.9% of the total traffic registered in 2013).

The table above is dedicated to the last forecasts for 2014 and variations on 2013 provided by a selection of cruise terminals, expressed both as passenger movements and cruise calls.
As some ports have been able to indicate the cruise calls only, the numbers of considered ports are different: 11 (representing the 77.3% of the total 2013 traffic) for passenger movements while 17 (representing the 92.9%) for cruise calls.
In comparison to 2013 a decrease of passenger movements of –13% is expected, together with a one of -14.3% in terms of cruise ship calls. This is in line with what is happening for the entire Med with the already cited redeployment of ships to other world areas, after years of investments of the cruise companies increasing the offer in the Med area.

FERRY, HYDROFOIL AND FAST CATAMARAN TRAFFIC

Map 4] *Main Adriatic ferry, hydrofoil and fast catamaran routes, 2014*



The map traces the main routes sailed in the Adriatic by ferries, hydrofoils and fast catamarans. This map does not include the dense connection among Croatian islands (ferries and fast ships that in 2013 accounted for more than 11.3 million passengers, with an increase of 1.73% on 2012). These internal routes include the area of Split towards the nearby islands of Brac, Salta, Hvar, and the area of Zadar towards Ugljan and Pasnam, the ferry routes between the Island of Cres and Krk, Vlbiska and Merag, Prizna and Zigljen, and the Istrian island to Brestova.

Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

Table 7] *Ferry, hydrofoil and fast catamaran overall traffic in Adriatic ports, absolute values and percentages, 2013*

Port		Country	Traffic		Share % on total	
			Passenger movements	Calls*	Passenger movements	calls
1	Split**	HR	4,011,954	14,882	23.7%	18.3%
2	Igoumenitsa	GRE	2,499,199	10,811	14.7%	13.3%
3	Zadar	HR	2,405,841	17,000	14.2%	20.9%
4	Corfu	GRE	1,575,473	15,197	9.3%	18.7%
5	Bari	ITA	1,095,810	1,582	6.5%	1.9%
6	Ancona	ITA	1,064,562	2,697	6.3%	3.3%
7	Durres*	ALB	731,917	1,183	4.3%	1.5%
8	Patras	GRE	723,991	1,886	4.3%	2.3%
9	Dubrovnik	HR	527,168	5,078	3.1%	6.3%
10	Brindisi	ITA	469,968	1,061	2.8%	1.3%
11	Rovinji	HR	266,612	607	1.6%	0.7%
12	Sibenik	HR	233,407	2,077	1.4%	2.6%
13	Porec*	HR	175,734	3,308	1.0%	4.1%
14	Rijeka	HR	165,253	727	1.0%	0.9%
15	Termoli	ITA	162,058	771	1.0%	0.9%
16	Tremiti	ITA	143,879	n.a.	0.8%	n.a.
17	Venezia	ITA	138,648	213	0.8%	0.3%
18	Trieste	ITA	66,641	161	0.4%	0.2%
19	Montenegro***	MON	43,097	n.a.	0.3%	n.a.
20	Umag/Novigrad*	HR	37,855	74	0.2%	0.1%
OTHER FERRY PORTS			420,585	1,867	2.4%	2.5%
TOTAL			**16,959,652**	**81,182**	**100%**	**100%**

Source: Risposte Turismo (2014), Adriatic Sea Tourism Report. Table shows only the main 20 ports for international traffic. Notes: (*) where were not available, some values (pax. movements or calls) were estimate with multi-year dataset trend. (**) data does not include tourist and small boats. (***) all ports of Montenegro.

Table 7 lists the main 20 ferry, hydrofoil and fast catamaran Adriatic ports in terms of passenger movements. We should remember that this kind of product it is not used exclusively for tourism. In contrast to cruising - entirely for leisure purposes - many of the routes supply transport services, often public ones, to assist island residents and connect local territories, rather than responding to tourist demand even if they are registered, and provided to us by the ports itself, as the same in a very heterogeneous and complex sector. In terms of absolute values Split is the first port that registers over 4 million in 2013 (not including tourist and small boats). The first 10 positions remained the same of 2012 with an overall traffic in the collected ports equal to 16.96 15.1059 million of passengers (it was 17.1 in 2012). Even if slightly less reliable, the ferry call data (81,182) show a decrement of -0.9% on 2012 values, with Zadar leading the rank.

Table 8] *Concentration of ferry, hydrofoil and fast catamaran passenger movements in Adriatic ports, 2012 and 2013*

Passenger movements	first 3	first 5	first 10
2013	52.6%	68.3%	89.1%
2012	52.2%	68.5%	88.8%

Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

For this kind of traffic Adriatic reveals a strong concentration, even if lower than the cruise one, with more than half of the passenger movements in the first 3 ports.

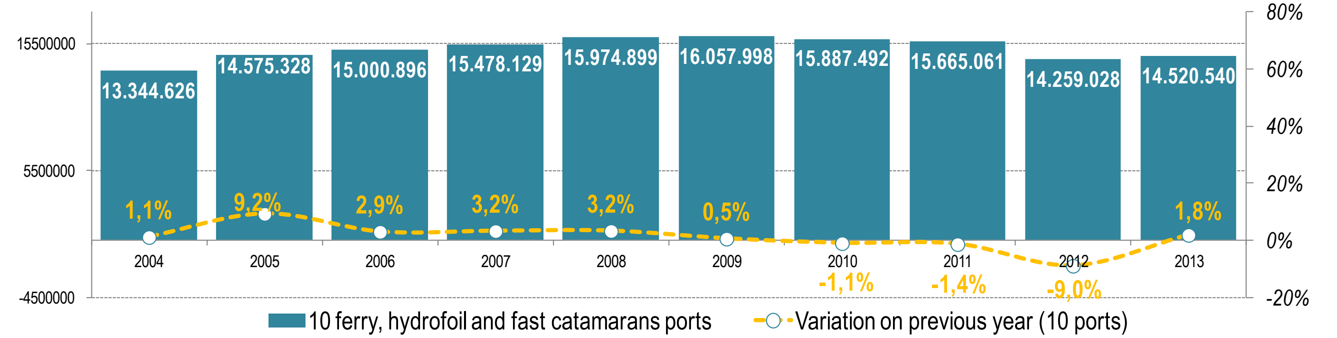
Table 9] *Ferry, hydrofoil and fast catamaran passenger movements by country, absolute values and percentage shares, 2012-2013*

PORTS	2013*		Share % on total		2012		Variation % on 2012	
Country	Pax. mov.	Calls	Pax. mov.	Calls	Pax. mov.	Calls	Pax. mov.	Calls
CROATIA	7,874,264	43,961	46.4%	54.2%	7,822,238	43,252	0.7%	1.6%
GREECE **	4,798,663	27,894	28.3%	34.4%	4,556,500	28,688	5.3%	-2.8%
ITALY **	3,223,948	7,539	19.0%	9.3%	3,566,808	8,057	-9.6%	-6.4%
ALBANIA	1,009,186	1,632	6.0%	2.0%	1,101,025	1,780	-8%	-8%
MONTENEGRO	43,097	n.a.	0.2%	n.a.	53,259	n.a.	-19%	n.a.
SLOVENIA	10,494	156	0.1%	0.2%	10,494	156	stable	stable
BOSNIA-HERZEGOVINA	0	0	0.0%	0.0%	0	0	0.0%	0.0%
TOTAL	**16,959,652**	**81,182**	**100%**	**100%**	**17,110,324**	**81,935**	**-0.9%**	**-0.9%**

Source: Risposte Turismo (2014), Adriatic Sea Tourism Report. Notes: (*) where were 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.

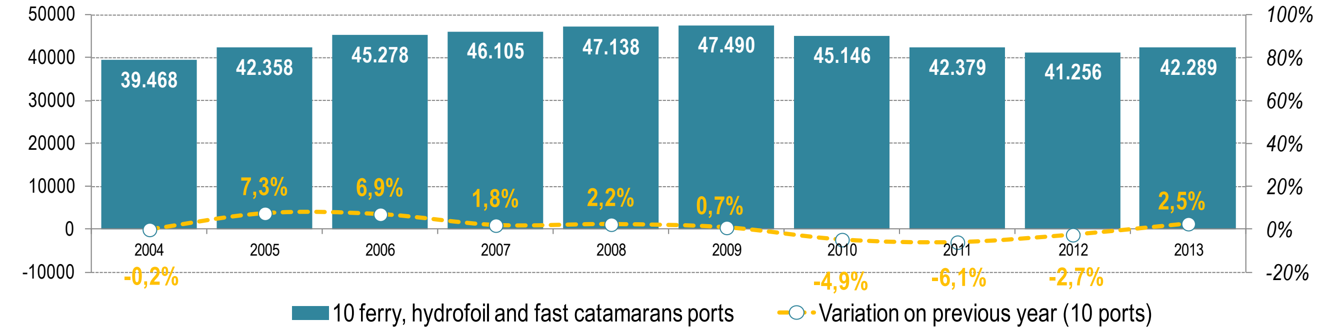
Considering the Adriatic countries - limited to 6 of them as Bosnia-Herzegovina does not host ferry, hydrofoil and fast catamaran traffic - it is possible to notice the supremacy of Croatia that registers around half of the total Adriatic traffic even if only medium and long haul movements are here considered, excluding some short internal connections.
In an overall framework of decrease (near 1% both in passenger movements and ship calls) it is also possible to register that the considered ports of Greece showed the stronger increase whilst Italian ports continue suffering a decrease in traffic both in terms of passenger movements (-9.6%) and in terms of calls (-6.4%).

Graph 9] *Trend of ferry, hydrofoil and fast catamaran passenger movements and growth rate in 10 Adriatic ports, 2004-2013*



Source: Risposte Turismo (2014), Adriatic Sea Tourism Report. Note: trend referred to 10 ports with a complete 10 year dataset (Ancona, Bari, Brindisi, Corfu, Dubrovnik, Durres, Igoumenitsa, Split, Venezia and Zadar).

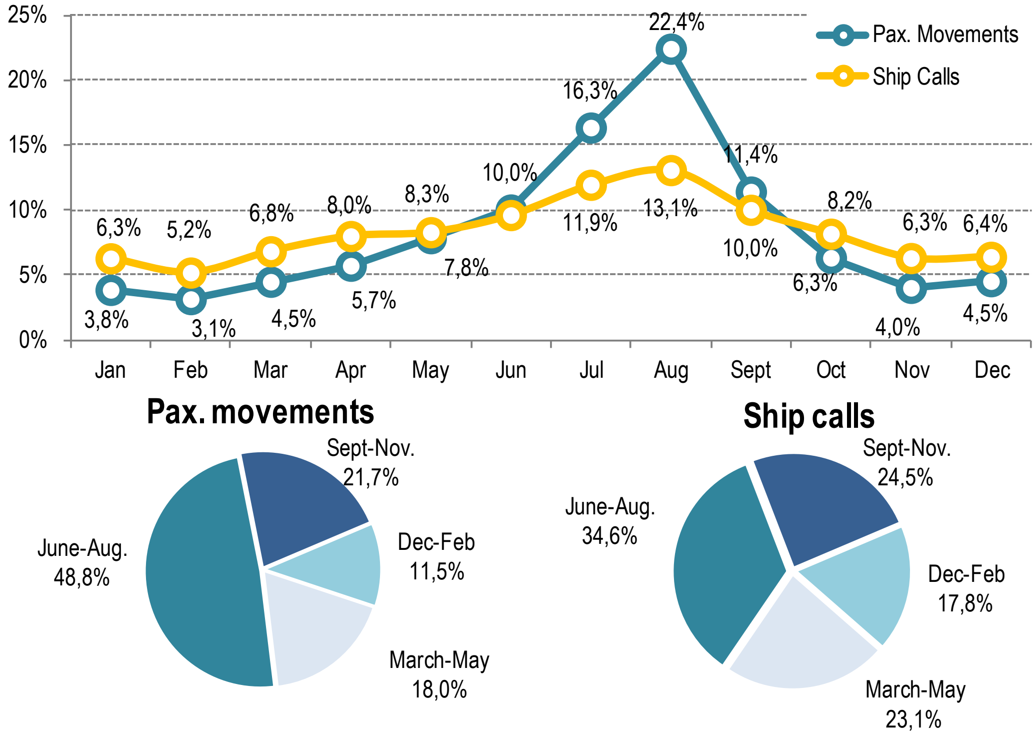
Graph 10] *Trend of ferry, hydrofoil and fast catamaran calls and growth rate in 10 Adriatic ports, 2004-2013*



Source: Risposte Turismo (2014), Adriatic Sea Tourism Report. Note: trend referred to 10 ports with a complete 10 year dataset (Bari, Brindisi, Corfu, Dubrovnik, Durres, Ravenna, Rijeka, Sibenik, Split and Venezia).

The two series show trends of passenger movements and calls of 10 among the main ports in the Adriatic with a complete 10 year dataset during the decade 2004-2013. It is possible to notice a sort of curve that ended in 2012 to change its direction. 2013 reveals itself as the first one with a reverse trend in both variables (confirmed by the orange line that expresses the variations on previous year, showing 2009 as the peak of set).

Graphs 11, 12 & 13] *Monthly and trimester shares of ferry, hydrofoil and fast catamaran passenger movements (left pie) and calls (right pie) in the Adriatic, 2013*



Source: Risposte Turismo (2014), Adriatic Sea Tourism Report. Note: 16 ports provided seasonality details (Ancona, Bari, Brindisi, Corfu, Dubrovnik, Igoumenitsa, Novigrad, Pula, Ravenna, Rijeka, Rodi Garganico, Sibenik, Split, Trieste, Venezia, Vieste).

Seasonality of this kind of traffic, with respect to cruise, is more pronounced in two summer months for passenger movements. In July and August it is registered around 40% of the total traffic of the year. The two pies express the share of the traffic divided into four periods of three months each. Also in this elaboration the summer stands out in terms of passenger movements with a more equilibrated division of the cruise calls.

Table 10] *Ferry, hydrofoil and fast catamaran traffic in the Adriatic, forecast for 2014 and variation on 2013*

	Pax. mov.	Calls	Variation 2014 on 2013				2013	
	2014	2014	% Pax. mov.	% Calls	Abs. Pax	Abs. Calls	Pax. mov.	Calls
Ancona	1,064,562	2,697	stable	stable	0	0	1,064,562	2,697
Brindisi	505,216	1,141	among 5-10%	among 5-10%	35,248	80	469,968	1,061
Corfu	1,575,473	15,197	stable	stable	0	0	1,575,473	15,197
Dubrovnik	n.a.	4,723	n.a.	-7%	n.a.	-355	527,168	5,078
Pirano	10,494	156	stable	stable	0	0	10,494	156
Pola	20,462	99	-3.4%	-53%	-12,205	-110	32,667	209
Ravenna	10,130	318	10%	10%	921	29	9,209	289
Rijeka	173,516	763	5%	5%	8,263	36	165,253	727
Sibenik	250,000	2,077	7.1%	0%	16,593	0	233,407	2,077
Split*	4,172,432	n.a.	4%	n.a.	160,478	n.a.	4,011,954	n.a.
Trieste	66,641	161	stable	stable	0	0	66,641	161
Zadar	2,405,841	17,000	stable	stable	0	0	2,405,841	17,000
12 Adriatic ports providing forecast: +2.1% passenger movements and -0.7% calls on 2013								

Source: Risposte Turismo (2014), Adriatic Sea Tourism Report. Note (*) Split data does not include tourist and small boats.

The 12 ports here listed have collaborated to this analysis in providing their forecasts for 2014. These ports represent the 60% of the 2013 total ferry, hydrofoil and fast catamaran traffic in Adriatic.
If Split will confirm at the end of the year its +4% forecast also with regards to ship calls, that could mean the beginning of a change in tendency from the negative phase, as we should observe in 2014 a stability or – even - a light increase with respect to the previous year.
This is the result of the declarations of five of these twelve ports (some of which very representative on overall ferry, hydrofoil and fast catamaran traffic in the Adriatic) as they confirm in fact a stability of the traffic with respect to 2013. And this is an element to do not undervalue after years of decrease in terms of passengers for this kind of traffics.

SAIL AND YACHT BOAT TRAFFIC

Map 5] *Marinas and small ports in the Adriatic Sea, 2014*

Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

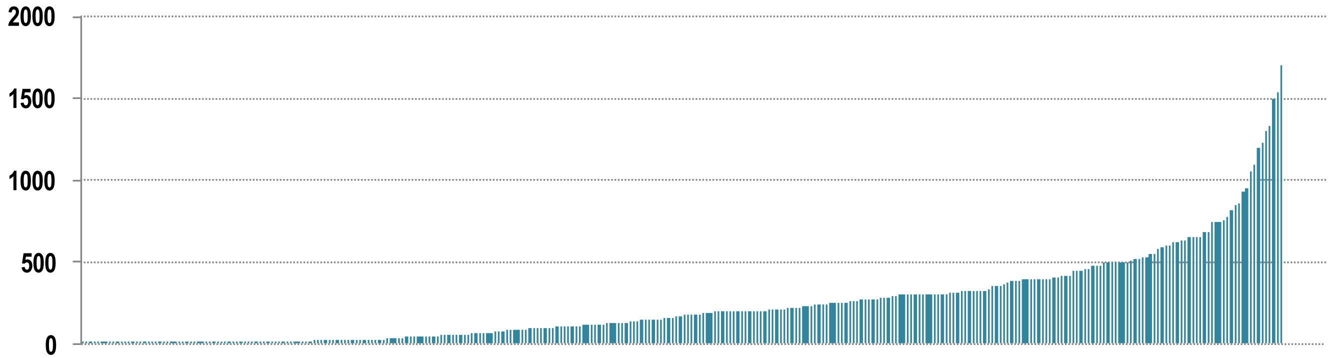
The mapping of marinas and small ports dedicated to boat tourism conducted in the past few months allowed to identify more than 300 structures (323) with around 80,000 moorings (76,884) located in the Adriatic area.
Italy is the country with the largest share both in terms of berths (61.5%) and structures (55.7%).
In the Adriatic Sea the average of berths per structure is around 240. Federation of Bosnia and Herzegovina is the only country that in its coastline could not count on a marina or a dedicated structure for nautical tourism.

Table 11] *Values and shares of berths and structures in Adriatic by country, 2014*

	Berths		Structures		Avg. berths per structure**
	value	% share	value	% share	
ITALY*	47,298	61.5%	180	55.7%	263
CROATIA	21,059	27.4%	126	39.0%	167
MONTENEGRO	3,586	4.7%	8	2.5%	448
SLOVENIA	2,886	3.8%	6	1.9%	481
GREECE*	1,855	2.4%	2	0.6%	928
ALBANIA	200	<0.3%	1	<0.3%	200
BOSNIA-H.	0	0.0%	0	0.0%	n.a.
TOTAL	**76,884**	**100%**	**323**	**100%**	**238**

Source: Risposte Turismo (2014), Adriatic Sea Tourism Report. Notes: (*) both for Italy and Greece, only their Adriatic ports are 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), 2014*



Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

The graph above shows the distribution of the boat structures in 2014 based on the number of mapped berths in Adriatic. The values are generally low for large part of the graph highlighting how small or medium many structures are. The largest ones (with more than 400 berths), as listed in table 12, represent more than a half of the total capacity of the Adriatic Sea (58%) even if only the 20% of the total structures. Two third of them (62.7%) are located in Italy.

Table 12] *Berths and shares of medium–large structures (> 400 berths) , per country, 2014*

	Berths		Structure		Share on total*	
	value	% share	value	% share	berths	structure
ITALY**	25,486	57.0%	42	62.7%	33.1%	13.0%
CROATIA	11,202	25.1%	16	23.8%	14.6%	5.0%
MONTENEGRO	3,508	7.8%	4	6.0%	4.6%	1.2%
SLOVENIA	2,700	6.0%	3	4.5%	3.5%	0.9%
GREECE**	1,855	4.1%	2	3.0%	2.4%	0.5%
TOTAL	**44,751**	**100%**	**67**	**100%**	**58.2%**	**20.6%**

Source: Risposte Turismo (2014), Adriatic Sea Tourism Report. Notes: (*) share of medium and large structure on total structures. (**) both for Italy and Greece, only their Adriatic ports are considered.

Table 13] *Density of boat structures and berths per Adriatic region, 2014*

COUNTRY	REGION	COASTLINE (KM)	BERTH/KM*	KM PER STRUCTURE*
ITALY	Puglia (Adriatic coast)	560	15	12
ITALY	Molise	35	23	18
ITALY	Abruzzo	133	20	19
ITALY	Marche	180	32	14
ITALY	Emilia Romagna	130	51	5
ITALY	Veneto	170	66	4
ITALY	Friuli Venezia Giulia	130	89	3
SLOVENIA	Karst	47	62	8
CROATIA	Istarska	539	7	45
CROATIA	Primorsko-goranska	1,065	3	89
CROATIA	Zadarska	1,082	5	18
CROATIA	Šibensko-kninska	806	6	40
CROATIA	Splitsko-dalmatinska	1,064	2	66
CROATIA	Dubrovačko-neretvanska	1,025	1	171
MONTENEGRO	Montenegro**	294	12	37
ALBANIA	Vlorë	244	1	244
GREECE	Corfu	200	9	100

Source: Risposte Turismo (2014), 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 Adriatic, the table shows that Friuli Venezia Giulia could count on 89 berths per km, followed by Veneto (66) and the Karst (62), the only region of Slovenia faced onto the sea. Croatia presents lower values, due to its numerous islands and coastline kilometres. If we pay attention at the km per structure figures, again, it is possible to notice that, apart from Albania with one marina only, located in the Vlore region, Croatia shows high values, moreover if compared to the Italians' one.

Table 14] *Berths, structures and the average of berths per structure in the Adriatic areas, 2014*

	Berths		Structures		Avg. berths* per structure
	value	% share	value	% share	
North	43,809	57.0%	169	52.3%	259
Centre	19,005	24.7%	98	30.4%	194
South	14,070	18.3%	56	17.3%	251
TOTAL	**76,884**	**100%**	**323**	**100%**	**238**

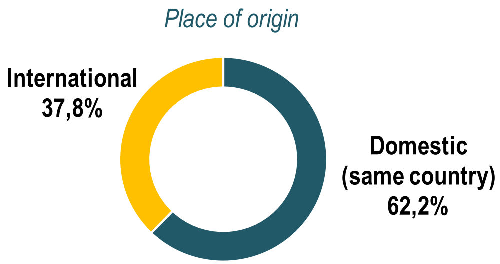
Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

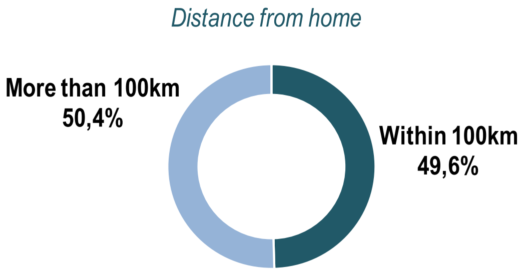
Map 6] *The sample of marinas collaborating at 2014 edition of ASTR*

The sample of 52 structures that collaborates filling the submitted forms or that were available for a direct interview represents around 19,000 moorings for almost 600 permanent employees, to whom should be added other 220 seasonal ones.
It is a particularly heterogeneous sample, composed both by marinas oriented to an international clientele (a fifth of them deals with international clients representing 90% of their total) as well as marinas mainly offering their services to a domestic or nearby resident clientele (half of their clientele is located within 100km from the structure).

Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

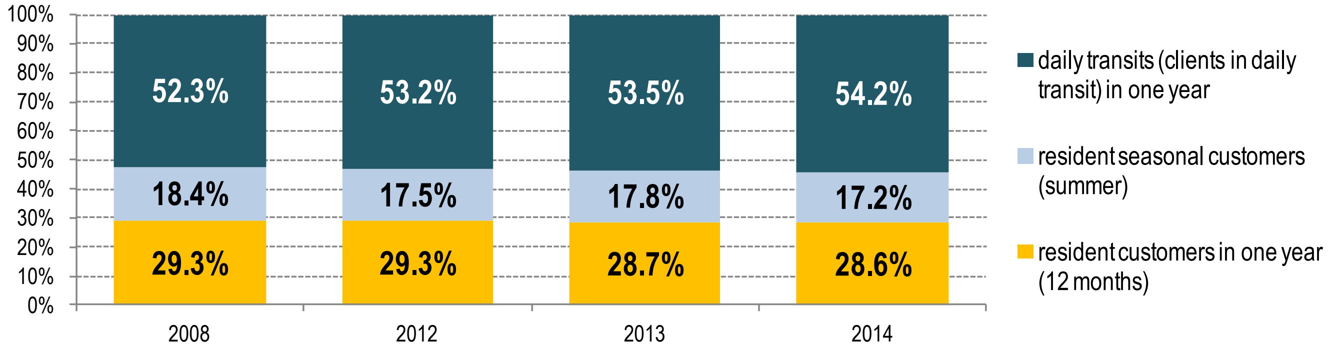
Graphs 15 & 16] *Comparison by place of origin of clients of the sample of marinas, 2013*





Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

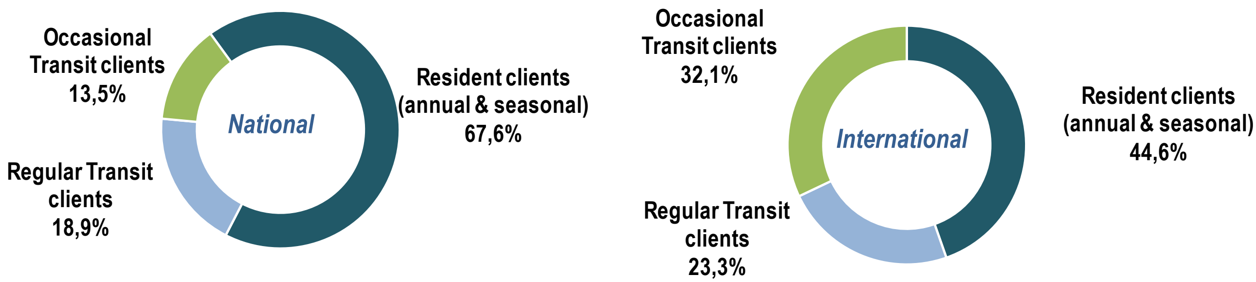
Graph 17] *Distribution of the type of clients of the sample of marinas, 2008, 2012, 2013 and 2014*



Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

Daily transits, that is clients that use the boat structures facilities only one day during the season, represent the majority of the clients of the sample of marinas indicating the presence of movements in the Adriatic. It is interesting to notice how the shares remained substantially stable with a small decline in the resident seasonal customers (the ones that use the boat structure only during summer time).

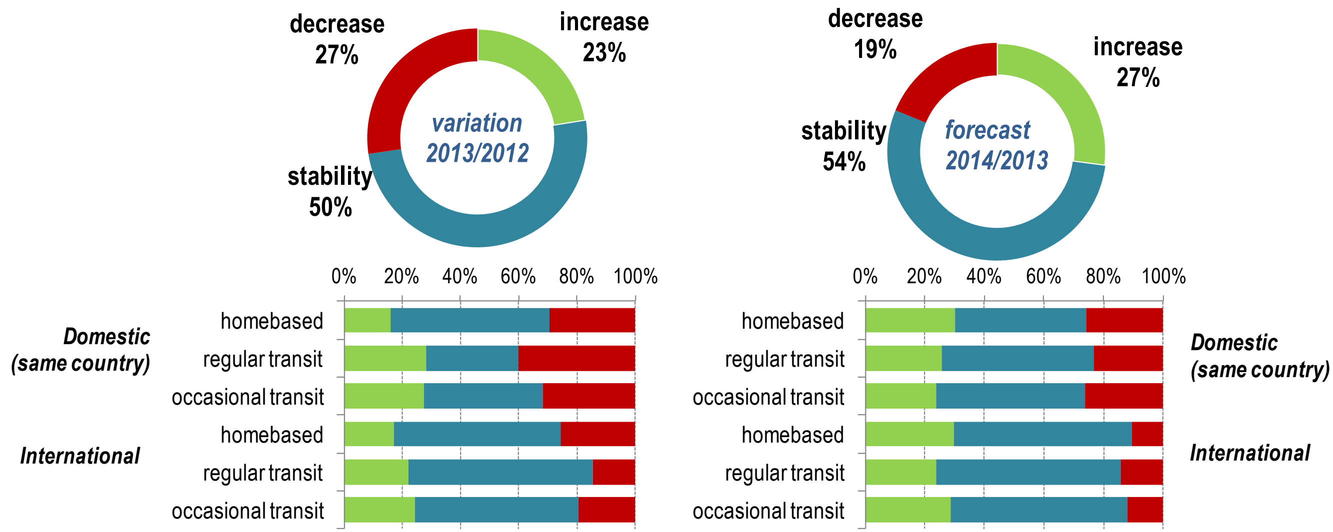
Graphs 18 & 19] *Distribution of customers of the sample of marinas by type and origin, 2013*



Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

National customers of marinas are mainly resident clients (67.6%) while occasional or regular (more than once during the season) transit clients represent more than a half of the international clients (55.4%).

Graphs 20, 21, 22 & 23] *Variations in clientele of interviewed marinas, 2013/2012 and forecasts, 2014*



Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

The marinas were asked to provide two values summarizing their variation of clientele 2013 on 2012 as well as a forecast of the variation of the upcoming one on 2013. The sample had to choose among three possibilities (decrease, stability or increase).
In general the collaborating structures expressed an increase in their positive confidence on the future as it is lower the share of the ones that forecast a decrease in 2014.
The stability is the choice that prevails among the respondents.
In relation to the forecast for 2014 season, as growth and stability are similar among the domestic or international clients, it is possible to notice that the last three red bars of the second graph on the right are smaller. The results show a stronger confidence in a less possible decline in international clients in relation to the domestic market.

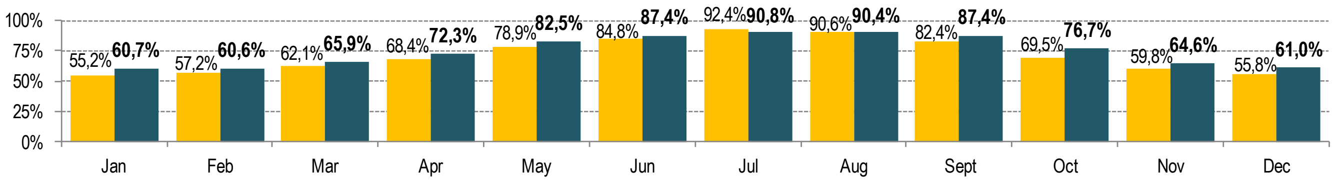
Table 15] *Number of annual and seasonal clients and daily calls of the sample, mean values and variations 2008, 2012, 2013 and forecast 2014*

	mean values				variations		
	2008	2012	2013	2014	13 on 08	13 on 12	14 on 13
Annual clients	1,072	1,153	1,093	1,117	2.02%	-5.16%	2.19%
Seasonal clients	687	701	692	713	0.73%	-1.33%	3.07%
Calls	1,957	2,137	2,118	2,250	8.25%	-0.87%	6.22%

Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

After ASTR 2013 Risposte Turismo continued acquiring information related to the dimension of the market. Table 15 shows the total number of clients of the sample, both annual or seasonal (as well as the boat in daily transit) in order to start defining a map of nautical tourism movements in the Adriatic. After a small decline on 2012 the 2013 is expected to grow for all the three variables (annual and seasonal clients plus calls) here considered.

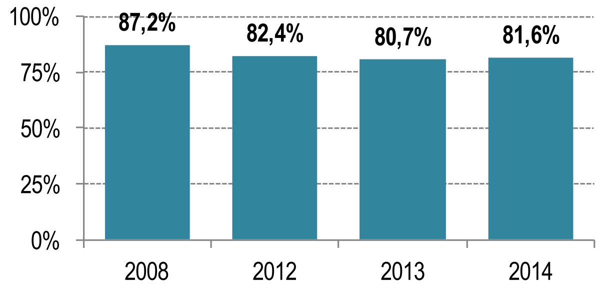
Graph 24] *Monthly occupancy rates forecast in interviewed marinas, 2013 vs. 2012*



Source: Risposte Turismo (2014), Adriatic Sea Tourism Report and 2013 edition (for 2012 data).

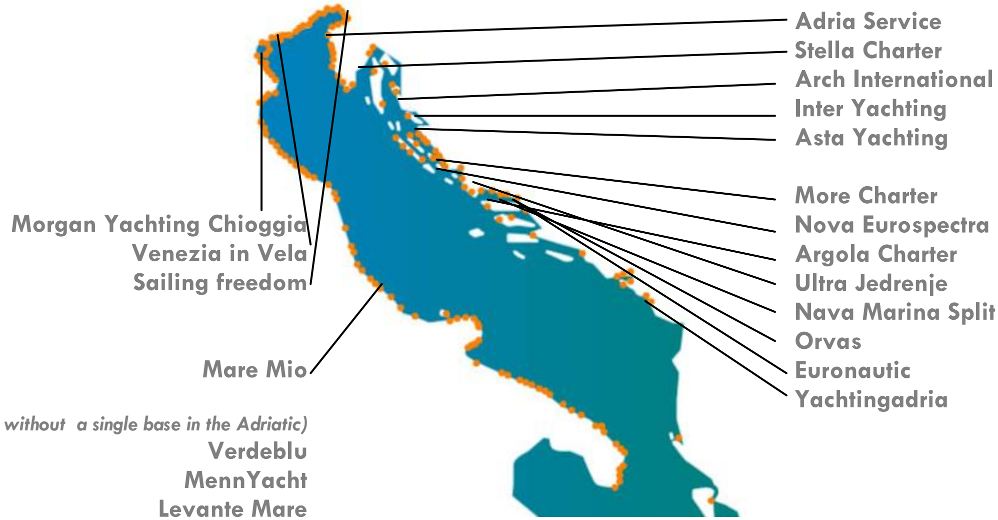
The monthly occupancy rates for 2013 showed in graph 24 are quite similar to the ones that emerged in Adriatic Sea Tourism Report 2013 (2012 data) even if the sample is not the same. The graph shows only a larger occupancy during the end of the season, but in both series the occupancy, even in winter months, never fell down half of the total berths. Looking back at 2008, the average yearly trend is slightly decreasing with, in 2014, an expected occupancy of 81.6% of the total berths.

Graph 25] *Trend of occupancy rates in interviewed marinas 2008, 2012, 2013 and forecast 2014*

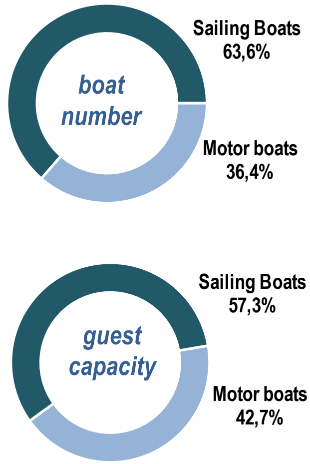


Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

Map 7] *The sample of charter companies collaborating at at 2014 edition of ASTR*



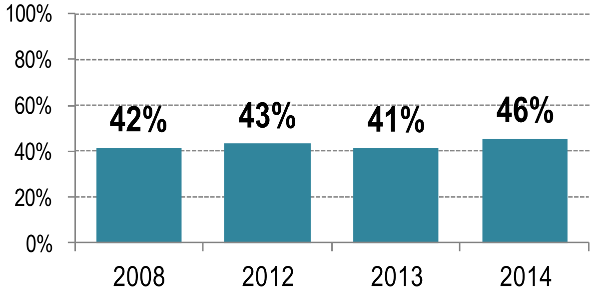
Graphs 26 & 27] *Typology of boats in the sample fleet*



Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

The sample of charter companies of Adriatic Sea Tourism Report 2014 edition is composed of 20 organisations. These boating tourism operators have, on average, a fleet of 13 sailing boats and 8 motorboats and this is reflected by graphs 26 and 27.
The majority of the companies have their nautical bases on the eastern cost of the Adriatic sea. Three of them are also brokers, so they do not have a nautical base whereas their main offices are located inland (Italy and in Austria).
On average, 8 fixed term employees work in the companies and during the peak season they are helped by 5 seasonal workers.
Concerning the opening year of these companies, the oldest of the sample opened in 1991 in Croatia, meanwhile the youngest, which has its base in Venice, started its activity just this year. More than half (60%) of the interviewed companies operate only in their own country while a similar percentage of the sample promotes their services mainly in Europe.

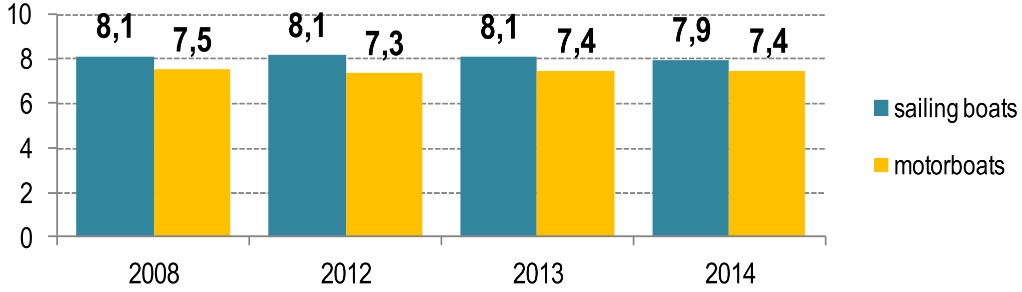
Graph 28] *Booking rates for boats of the sample charter companies fleets in 2008, 2012, 2013 and 2014*



Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

In relation to the operating period of the charter companies and the number of boats each one manages, the booking rates in 2013 stay among 41% and 46% as forecast for 2014.

Graph 29] *Average duration of bookings for sail and motor boats clients of the sample charter companies in 2008, 2012, 2013 and 2014*

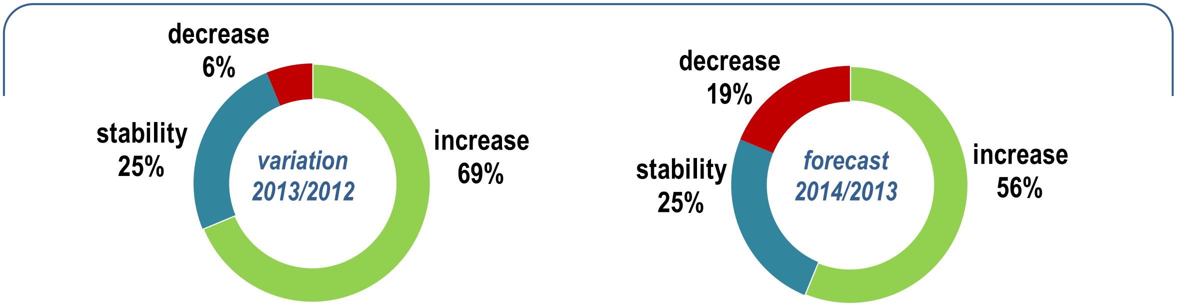


Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

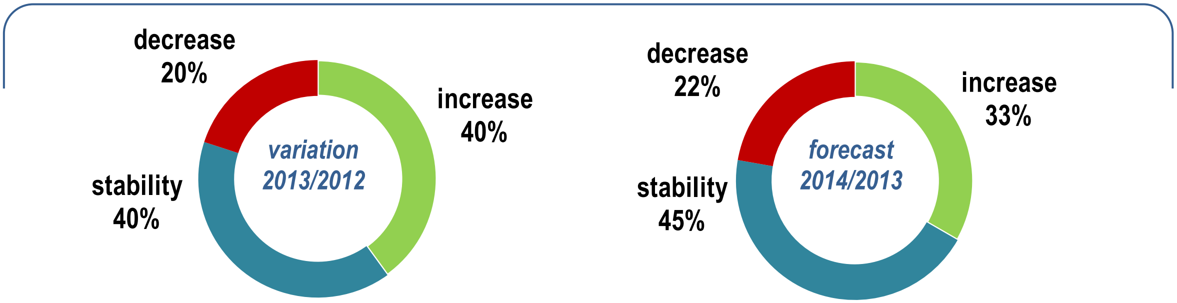
The average duration of bookings of the boats is around 7-8 days both for sailing and motorboats. Observing the blue columns of graph 29, it is possible to notice that in 2008 and in the last two years the customers booked the sailing boats for about 8 days, meanwhile for 2014 the companies forecast a little decrease (-0.2%).
This is not the case of the motor boats (yellow columns), which register a stability, confirming for 2014 season an average booking duration of 7.4 days.

Graphs 30, 31, 32 & 33] *Variations in clientele of sample charter companies for type of boat, 2013/2012 and forecasts 2014 /2013*

SAILING BOATS



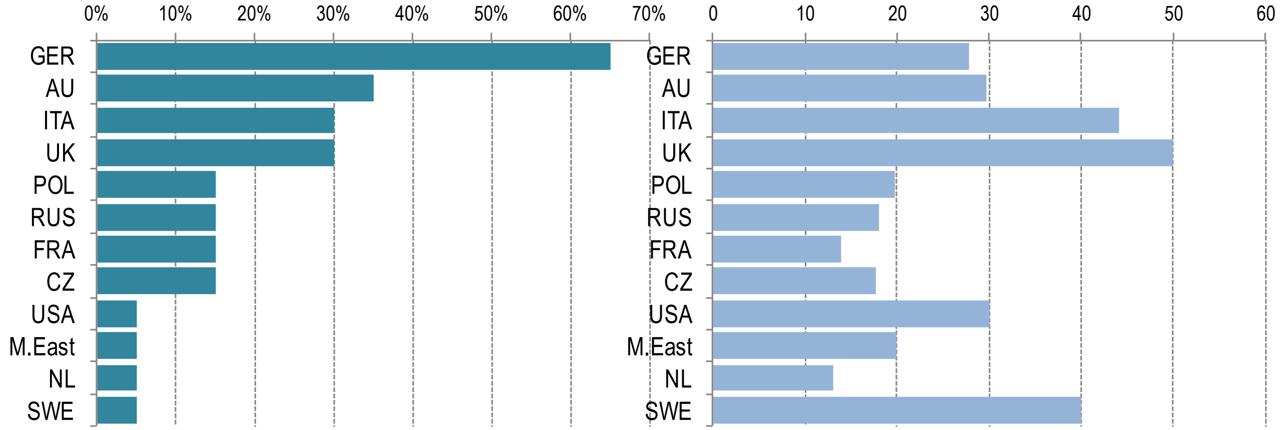
MOTOR BOATS



Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

The four graphs show, for sailing and motor boats, the variation of 2013 on 2012 clientele expressed by the sample companies, and the forecast for the upcoming season.
In relation to the type of boat there is a less optimism for motor boats than the sail ones even if the overall framework appears positive. More in general the outlook shows an increase always higher than the decrease. Forecasts for 2014 season reveal a worse situation than the one recorded in 2013. It is possible to register a larger share of decreases as well as smaller shares of respondents who affirmed a 2014/2013 increase in comparison to the variation 2013/2012. Consideration true both for sailing and motor boats.

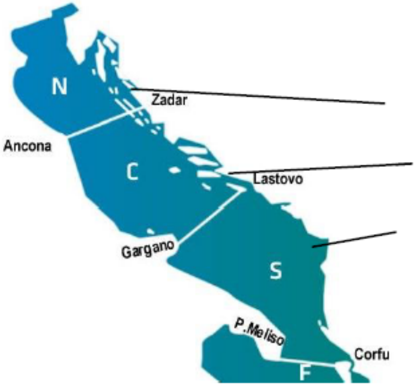
Graphs 34 & 35] *Origin countries of the customers of interviewed charter companies and their relative percentage on the overall customers, 2014*



Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

The charter companies were asked to unveil which were their clients' main origin countries and their relative percentage on overall customers. Results show mainly markets near to the Adriatic area but also some less obvious ones. More than 60% companies among the sample cited Germany. It should be interesting to notice that for some particular markets (like UK or SWE) charter companies reveled an high specialisation with these markets representing on average around half of the clientele (represented with the light blue column in the right graphic).

Graph 36] *The distribution of the itineraries chosen by the charter companies customers among the 4 areas of the Adriatic Sea, 2013*

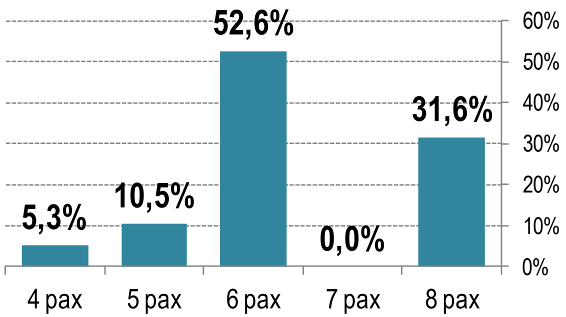


Northern Adriatic	30,5
Middle Adriatic	45,2
Southern Adriatic	19,0
Out of Adriatic	5,3
	100%

It is the middle Adriatic the area more chosen in 2013 (45.2%) by the clients of the interviewed charter companies to develop their itineraries, and three of four are located in Middle or Northern Adriatic.

Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

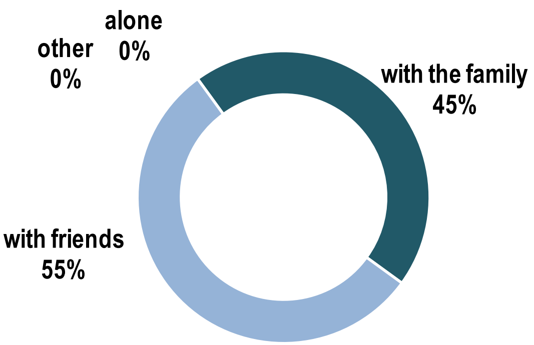
Graph 37] *Most frequently occupancy of the boats of the sample charter companies, 2013*



Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

In order to start a reflection related to the number of boat tourists that navigate throughout the Adriatic Sea, the charter companies were asked to declare the most frequently occupancy of their boats in 2013.
The sample indicates a range of the most frequently occupancy of the boats from a minimum of 4 passengers to a maximum of 8. On average, the occupancy is about 6.4 passengers per boat.

Graph 38] *General composition of the travel group clients of the sample charter companies, 2013*



Source: Risposte Turismo (2014), Adriatic Sea Tourism Report.

An information that could be influent for Adriatic tourism destinations is the kind of group that sails in chartered boats.
With the possibility to choose among 4 categories, the sample selected only two of them: the group travel is composed for the majority by friends (55%) meanwhile the other 45% of the customers sails with the family.
It should be cited that, according to the information provided, very few clients require a skipper (only 4 companies of 20 affirmed that the majority of their clients require one).

A COMMON FRAMEWORK FOR MARITIME TOURISM IN THE ADRIATIC SEA

Coastal and maritime tourism is not just a set of different phenomena. Even if in this report its components: cruise, ferry, sailing and yachting, have been presented separately, it is evident that these components are closely connected, facing similar challenges and problems with the need to reach similar goals, individually as well as collectively for a overall result for the territories and communities involved. It is sufficient to consider issues such as infrastructure investments, port dredging, land accessibility, integrated information systems, the promotion of local tourism and destination management in order to understand that these four elements of coastal and maritime tourism should be, or at least could be, considered as a whole.

This is particularly true when comprehension, analyses, forecasts and predictions for a specific area such as the Adriatic are considered, where all the components of the industry and tourism traffic co-exist and develop side by side, often involving the same operators and stakeholders. For this reason building and using a common framework should be considered to be an essential requirement to understanding the relevance of coastal and maritime tourism in the area, its problems, opportunities and perspectives. A common framework could also assist in competing with other destinations and regions in terms of building a unique image, if not a brand, and working in and promoting the whole area as a single destination, given that other regions such as the Caribbean, the Red Sea and the Baltic Sea have already taken the relevant steps and obtained significant results.

Risposte Turismo, within this framework, with the purpose of understanding the internal dynamics and how traffic and activities are, or are not, distributed and balanced, has continued – after its launch in the first edition of the Adriatic Sea Tourism Report – in its attempt to express the distribution of maritime tourism in the Adriatic regions: in Italy, Abruzzo, Emilia-Romagna, Friuli Venezia Giulia, the Marche, Molise, Puglia and the Veneto; the Karst 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.

Table 16, below provides an idea of the more or less significant presence of maritime tourism, showing how the different Adriatic regions position themselves in relation to the average values of cruise, ferry, sailing and yachting tourism traffic registered in the whole area. In order to draw it up six factors were identified for each region in an attempt to "read and measure" cruise, ferry, sailing and yachting tourism. The factors had been calculated using some of the values previously shown for 2013: for cruise and ferry, passenger traffic and the calls (demand), and for nautical tourism the number of structures and berths in the region (supply) are shown. Only the region of Puglia has above average values for all of them (sailing and yachting are considered together as nautical tourism). For the other five regions (three in Croatia, one in Italy and one in Greece) only one of the factors is below average. It should be noted that only five of the Adriatic regions where data for all forms of maritime tourism were available showed values of below average for all of them, which in a macro area with 25 regions could be considered to be a good result, the expression of a widespread phenomenon.

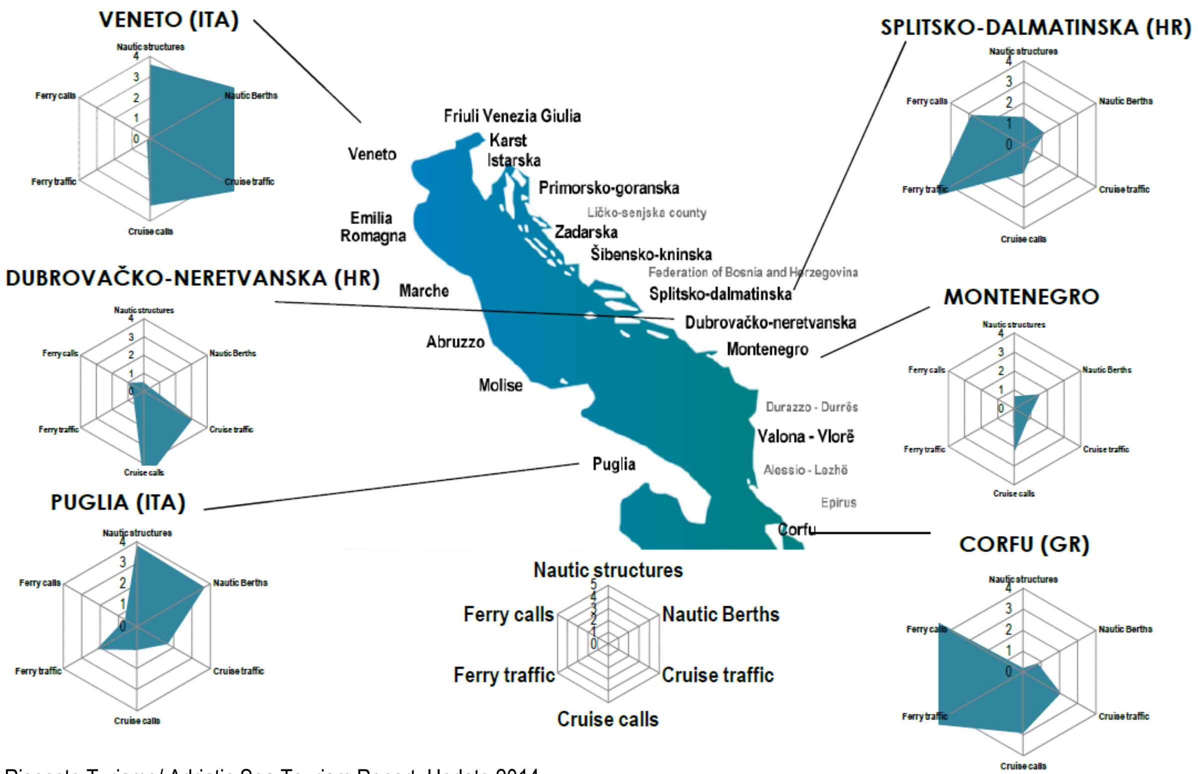
Table 16] *Relation with the average values for each maritime tourism form*

	Adriatic Region
each of the 3 form is over average	Puglia
2 on 3 over average	Corfu Dubrovačko-neretvanska Splitsko-dalmatinska Veneto Zadarska
1 on 3 over average	Emilia-Romagna Friuli-Venezia Giulia Šibensko-kninska Istarska Montenegro
all under average	Abruzzo Marche Molise Primorsko Goranska Karst

Source: Risposte Turismo (2014), Adriatic Sea Tourism Report. Not available all the data for: Ličko-senjska county, Epirus, Lezhë, Durrës, Valona and Herzegovina.

To provide additional evidence of how the individual regions compete with the other regions, but also to get an idea of how they may lean more toward one or two specific kinds of traffic, map 8 shows six diagrams representing some example regions in the Adriatic area. Each of the 6 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 allow easy recognition of the strengths but also the weakness in maritime tourism for each of the regions considered. It can be seen that Puglia is quite strong for each maritime tourism component (even if it has a low value for ferry calls), Montenegro shows interesting results for maritime tourism with good values for cruising whereas Veneto suffers from an absence of ferry traffic. With its two relevant ports, Corfu in Greece leads the Adriatic for ferries both in terms of calls and traffic, followed by Split in Croatia. In 2013 Dubrovačko-neretvanska registered the highest Adriatic value in terms of cruise calls.

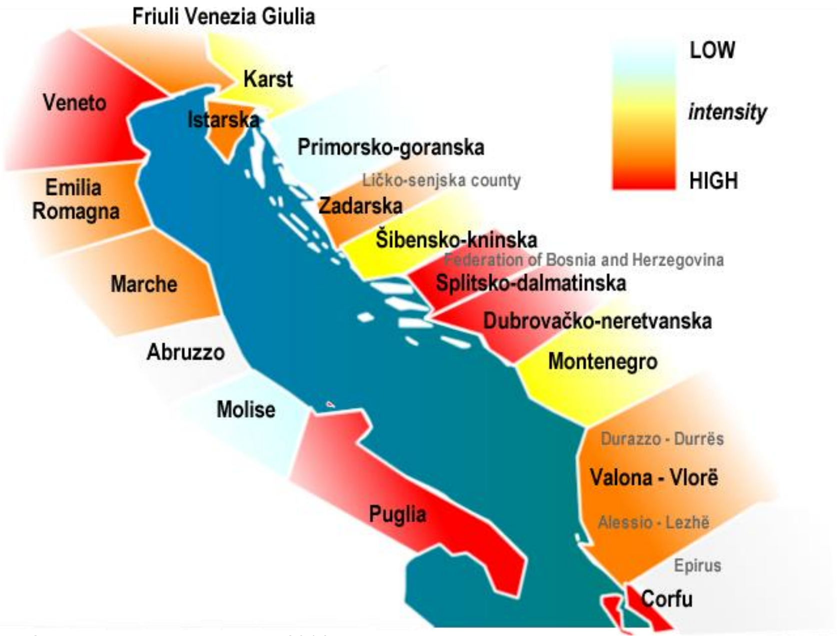
Map 8] *Maritime tourism intensity in 6 regions (combination of cruise, ferry, sail and yacht tourism)*



Source: Risposte Turismo/ Adriatic Sea Tourism Report, Update 2014.

The numbers and data provided in this report show that maritime tourism in the Adriatic area should be considered as a relevant phenomenon and as a priority for political, institutional and economic agendas of the governments of the individual countries as well as the agenda of the European Union. The attention the EU is paying to the Adriatic-Ionian macro region seems to testify that the right direction has been taken. The Adriatic shown in the map above shows different concentrations of maritime tourism implying that many steps still have to be taken, inspired in most part by the idea that a common strategy and approach are necessary to address the desired improvements and to successfully compete on a global scale. These steps include: 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; a strong promotional strategy to create a new awareness of the macro region as a destination, which is still a long way off, especially considering the potential demand outside Europe.

Map 9] *Maritime tourism intensity in the Adriatic regions (combination of cruise, ferry, sail and yacht tourism)*



Source: Risposte Turismo/ Adriatic Sea Tourism Report, Update 2014.

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