

PRESS RELEASE

RISPOSTE TURISMO: growth in 2023 for sea tourism in the Adriatic

According to the latest edition of the Adriatic Sea Tourism Report:

- **Cruisers: 4.3 passenger movements expected (+27% vs 2022)**
- **Ferries and hydrofoils: more than 18 million passenger movements in 2023 (+5-10% vs 2022)**
- **Nautical tourism: more than 100 million in investments ongoing or planned by 2024 in 9 nautical facilities and more than 3,000 new moorings**

The forecasts presented by Risposte Turismo during the day of the opening of the fifth edition of Adriatic Sea Forum – Cruise, Ferry, Sail & Yacht, in Bari

The year 2023 as a year of growth for seaborne tourism in the Adriatic, driven by forecasts of a further revival of cruise traffic, by a general forecast of growth in ferry traffic (as indicated by the main ports on both coastlines), and by the confidence of marinas and nautical charter companies as to volumes of customers expected in the coming year.

All this emerges from the latest edition of the **Adriatic Sea Tourism Report** published by Risposte Turismo and presented by Francesco di Cesare, the President of Risposte Turismo, during the opening of the fifth edition of **Adriatic Sea Forum - Cruise, Ferry, Sail & Yacht**, the international itinerant event hosted by the Cruise Terminal in Bari and dedicated to seaborne tourism in the Adriatic.

This event, the brainchild of Risposte Turismo, was organised this year in partnership with Autorità di Sistema Portuale del Mar Adriatico Meridionale (the port system authority of the southern Adriatic Sea) and Pugliapromozione. It is once more the setting for presentation of the key results of Risposte Turismo's research work, which serves as a point of reference for all local maritime tourism operators.

Ongoing recovery of the cruise traffic sector: in 2023, 4.3 passenger movements expected (+27% vs 2022)

In regard to cruise traffic, according to Risposte Turismo's study, 4.3 million passengers will be handled (embarking, disembarking and transiting) during 2023 at Adriatic cruise ports (up 27% on the 2022 closing forecast). However, the level is still far below the area's historical record of 2019 (5.7 million passengers handled).

According to Risposte Turismo forecasts, Corfu will top the ranking of cruise ports in the Adriatic, with more than half a million passengers expected. Similar performance is expected in Dubrovnik (525,000) and Kotor (over 500,000). The Puglia region's Adriatic ports are expected to host more than half a million passengers (at the ports of Bari and Brindisi).

These forecasts are the result of the projection made by Risposte Turismo based on the estimates for 16 Adriatic cruise ports: ports of call that, in total, in 2022 accounted for 69% of total passengers handled and 70% of ship calls.

Ferry passenger movements in 2023, again in excess of 18 million

On analysis of passenger movement on ferries, hydrofoils and catamarans, the Adriatic Sea Tourism Report foresees for the top 14 Adriatic ports an increase in traffic in 2023 vs this year, albeit varying in scale. While more marked growth is expected in the eastern Adriatic area (due to the strengthening of internal connections between the mainland and islands), moderate growth or basic stability is expected to the west vs 2022. In all, the 18 million passengers threshold will once more be topped (+5-10% vs 2022).

Among the ports surveyed, we have positive forecasts for Zadar (2.3 million, +4% vs 2022), Dubrovnik (480,000, +3%), Sibenik (137,000, +3%), and Rijeka (134,000, +60%). Performance of Bari and Brindisi is good, with an increase of +10% expected (therefore in excess of about 1.1 million and 400,000 passengers, respectively).

More than 100 million euros in investments ongoing or planned by the close of 2024

As in the previous editions, Risposte Turismo's research report also contains an in-depth look at sea tourism in the seven countries bordering the Adriatic.

With reference to new marinas upcoming, and to planned investments, between the second half of 2022 and 2024 the Adriatic will see new moorings in 9 facilities (7 new and 2 expansion projects) totalling more than 3,000, with investments exceeding 100 million euros, in Italy, Croatia and Albania.

From the analysis of marinas along the Italian coastline - in addition to completion of the San Pietro marina in Termoli, with plans to add about 100 moorings, and the San Foca marina (Lecce), whose goal is to triple the 183 moorings currently available – construction of a new marina for superyachts (up to 100 mt) is planned for Bari, with an investment of 36 million euros, as part of the San Cataldo Pier redevelopment project.

On the Croatian front, construction work on the new ACI Marina in Novalja (which will host about 300 moorings) is expected to be completed by the end of this year. By mid-2023, the Croatian company ACI-Gitone is expected to begin construction work on the new Porto Baroš marina in Rijeka, which will host 230 moorings and is expected to become operational in 2024. Also nearing completion within the next two years are the Marina Korkyra expansion projects in Vela Luka, where growth in capacity is expected from 132 to 177 moorings, and Marina Polesana in Pula, which is expected to bring 1,150 additional moorings.

In Albania, the luxury Porto Albania complex at the peninsula of Kalaja and Turrës with a marina for more than 700 moorings, and the new “Durrës, Yachts and Marina” project at the Durrës marina are expected to be completed. This project is to be unveiled today at the Adriatic Sea Forum. Covering 44 hectares, it includes tourist and waterfront upgrades worth an additional sum of 140 million euros.

According to an analysis of the geographical distribution of facilities and moorings, among the countries bordering the area, Italy firmly maintains its leadership: 189 marinas (56.1% of the total) and 48,677 moorings (61.5% of the total). Ranking second is Croatia (126 marinas, standing at 37.4% of the total - and nearly 21,000 moorings, standing at 26.4% of the total) ahead of Montenegro (3,545 moorings, standing at 4.5% of the total, and 8 marinas: 2.4% of the total).

The report also includes forecasts for 2023 for the activities of a representative sample of 58 marinas (about 20,000 moorings and 695 employees in all, including seasonal workers), and of 23 charter companies operating in the Adriatic.

For both samples examined, the survey indicates stability or growth, vs the previous year, for clientele served in 2022 and expected in 2023, with particularly rosy forecasts for charter companies and demand for sailing boats in the coming year. Still prevailing for marinas, however, remains the demand for proximity, given a still slow recovery rate for long-haul travel.

On further analysis of tourist marinas, the Adriatic Sea Tourism Report foresees growth in the occupancy rate for 2023 (from 78.3% in 2022 to 84.1%) and an increase in day-to-day transiting customers (from 68.3% in 2022 to 70.8%).

“Through our research work,” comments Francesco di Cesare, “we have found data that enable us to sketch out growth in 2023 vs 2022 for all the maritime tourism of the Adriatic. Supply grows, demand grows, the result of investment, and eager efforts on the part of operators to revive pre-pandemic affairs, as well as a desire on the part of tourists to return to holidaymaking. However, volumes will not return to those of 2019. This is true for cruising (which in the Adriatic also suffers from limited ship access to Venice); and it is true for ferry and hydrofoil traffic (which, while it will not show significant differences compared to 2019, continues not to accelerate on the available connections front). This is true also for boating, despite the number of facilities available along the Adriatic coastline and the potential draw of the various destinations in the area, which could generate much more traffic than at present. Therefore, it is right to stress the growth forecasts for 2023 vs 2022 and this year's higher numbers vs last year. But one must also reflect on hindrances to more rapid recovery to pre-covid levels alongside the force of attraction that is so fitting for an area of such great potential and wealth as the Adriatic.”

12 events and more than 50 international speakers

The fifth edition of Adriatic Sea Forum opens with introductory addresses by Ines Pierucci - Councillor for Tourism and Culture of the Municipality of Bari, by Luca Scandale. Director General of the regional agency, Pugliapromozione, and by Admiral Vincenzo Leone, the Maritime Director of Puglia and Ionian Basilicata, plus an introductory speech by Ugo Patroni Griffi, President of the Sistema Portuale del Mar Adriatico Meridionale (the southern Adriatic sea port system authority).

The forum continues with a round table dedicated to tourist profiling, the characteristics of Adriatic maritime tourists, and strategies that operators and territories can adopt to intercept tourists' needs and expectations

The forum will conclude with four round tables dedicated to the future of the ferries sector and its potentials that are not fully expressed as yet, strategies for innovation and progress, analysis of supply chains, challenges facing local operators, the draw of the Adriatic for nautical tourism, and the problems faced by companies looking to the labour market for qualified workers to further their affairs and provide the services required.

The two days in Bari dedicated to business networking, comparing notes, and debating the potentials and challenges posed by the Adriatic, begin once more tomorrow at 9:45 with a round table on LNG as a fuel and electric power in the various sectors of maritime tourism, Then comes a panel dedicated to the future of the cruises industry, with MSC Crociere, Costa Crociere, Venezia Terminal Passeggeri and the Cruise Lines International Association. Lastly, a round table on accessing, and mobility within, the area of the Adriatic, and the investments planned for the coming years.

The afternoon will see Assoportri talk on port infrastructures, followed up by a round table dedicated to the future of maritime tourism in Puglia, which is one of the most valid protagonists in the Mediterranean in this sector.

The Bari forum shall also provide an opportunity to learn about MIMOSA, FRAMESPORT, SUSPORT and TECHERA (European interregional cooperation projects active in the Adriatic area).

Gruppo Bassani is the main sponsor of the fifth edition of Adriatic Sea Forum, Cruise, Ferry, Sail & Yacht. ECOLAB and MedCruise are sponsors. Supporting the event is Bari's Chamber of Commerce.

The event is also held under the auspices of the Ministry of Tourism and Ministry of Sustainable Infrastructure and Mobility. Supporting organisations are also Assoportri, Assomarinas, Assonat, the Forum of Adriatic and Ionian Chambers of Commerce, Propeller Club, Youngship Italia and the Italian and Croatian travel agency associations FIAVET and UHPA.

The full programme is available at adriaticseaforum.com and on the [Twitter](#) and [LinkedIn](#) pages.

Risposte Turismo

Risposte Turismo is a research and consultancy concern serving the tourism macro-industry. It has been active for over 20 years in Italy and Europe, specialising in providing planning and operational solutions for organizations and companies in the tourism sector.

In addition to Adriatic Sea Forum, Risposte Turismo has devised (and implements) Italian Cruise Day, a key event for the Italian cruise industry, which in 2023 will see the eleventh edition in Taranto, plus Shopping Tourism, and Forum Italiano, the first event dedicated to shopping tourism in Italy, this year with an unprecedented "on tour" format (Venice 27 October, Ancona 16 November and Bologna 1 December)

Among the themes and sectors most deeply studied: maritime tourism, shopping tourism, film induced tourism, running tourism, wine tourism, glamping, territorial spillovers of major events, and destination management.

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