

Adriatic Sea Tourism Report

2022 EDITION

EXECUTIVE SUMMARY

NEW CHALLENGES FOR MARITIME TOURISM IN THE ADRIATIC SEA

The 2022 edition of Adriatic Sea Tourism Report (ASTR) continues the series of analysis and description of maritime tourism in the Adriatic Sea, with information and data that have been updated since 2013. This report provides in-depth quantitative and qualitative information on the three sectors of maritime tourism in the Adriatic Sea: cruise, ferry and sail and yachting tourism.

This report is the result of information and data collection directly carried out by Risposte Turismo thanks to extensive dialogue with several Adriatic stakeholders who collaborated. Among these, ports and marinas (individual and networks), passenger terminals, charter operators, navigation and tourism companies, national institutes of statistics, tourism destinations, public administrations and tourism boards.

The 2022 edition of the report – in addition to methodology and an introduction – keeps the structure of three chapters, each of which focused on the cruise, ferry and sail and yachting sectors, with graphs, tables and maps and an examination of the movements of tourists by sea, directions, dimensions, and behaviours. As for the previous Adriatic Sea Tourism Report, the final chapter is dedicated to a special focus, this year on four international Adriatic maritime tourism projects ongoing. Again, this year a double ad-hoc survey on the nautical sector was conducted in the summer and was addressed to marinas and charter companies. It highlights information related to demand and supply with a transnational perspective.

The Adriatic is an international space that still requires efforts to be fully recognised as a brand and a unique destination. Studies and analysis like this may give a contribution but a stronger commitment both from public and private operators is needed. The summary of data that follows below should be sufficient to give an idea of the unequivocal relevance that the Adriatic assumes in international geography and maritime tourism – even if in a year of recovery after two years of pandemic that interrupted a continuous growth that led to the 2019 records.

Maritime tourism in the Adriatic Sea in 2022 at a glance: Adriatic gates and routes



more than 30 cruise ports
3.37 million passenger movements
and 2,928 cruise calls

more than 40 ferry ports
almost 18 million passengers,
6 of them on international routes

337 structures
for boat tourism
more than 79,000 moorings

Source: Risposte Turismo,
Adriatic Sea Tourism Report (2022).

CRUISE

Cruise traffic by country, absolute values and % share, 2022

PORTS	2022		Share % on total	
	Country	Pax. mov.	Calls	Pax. mov.
ITALY*	1,367,046	927	40.5%	31.7%
CROATIA	900,404	995	26.7%	34.0%
GREECE*	560,282	415	16.6%	14.2%
MONTENEGRO	415,000	453	12.3%	15.5%
SLOVENIA	76,389	94	2.3%	3.2%
ALBANIA	56,280	44	1.7%	1.5%
BOSNIA-HERZEGOVINA	-	-	-	-
TOTAL 2022	3,375,402	2,928	100%	100%

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

Ferry, hydrofoil and fast catamaran passenger movements by country, absolute values and % share, 2022

PORTS	2022		Share % on total	
	Country	Pax. mov.	Calls	Pax. mov.
CROATIA	9,086,500	44,208	50.8%	54.5%
GREECE **	4,700,000	26,333	26.3%	32.4%
ITALY **	2,716,100	6,983	15.2%	8.6%
ALBANIA	1,365,000	3,378	7.6%	4.2%
SLOVENIA	25,000	278	0.1%	0.3%
MONTENEGRO	n.a.	n.a.	n.a.	n.a.
BOSNIA-HERZEGOVINA	0	0	0.0	0.0
TOTAL 2022	17,892,600	81,180	100%	100%

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

Values and shares of berths and structures in Adriatic by country, 2022

	Berths		Structures		Avg. berths per structure**
	value	% share	value	% share	
ITALY*	48,677	61.5%	189	56.1%	258
CROATIA	20,921	26.4%	126	37.4%	166
MONTENEGRO	3,545	4.5%	8	2.4%	443
SLOVENIA	3,470	4.4%	8	2.4%	434
GREECE*	2,358	3.0%	5	1.5%	472
ALBANIA	200	0.3%	1	0.3%	200
BOSNIA-H.	0	0.0%	0	0.0%	n.a.
TOTAL	79,171	100%	337	100%	235

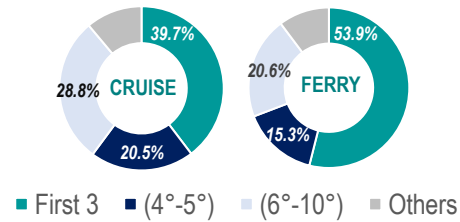
Notes: (*) both for Italy and Greece, only their Adriatic ports have been considered; (**) the values are rounded either up or down to whole numbers.

Berths, structures and the average of berths per structure in the Adriatic areas, 2022

	Berths % share	Structures % share	Avg. berths per structure
NORTH	55.7%	57.9%	226
CENTRE	20.5%	19.6%	246
SOUTH	23.8%	22.6%	248
TOTAL	100%	100%	235

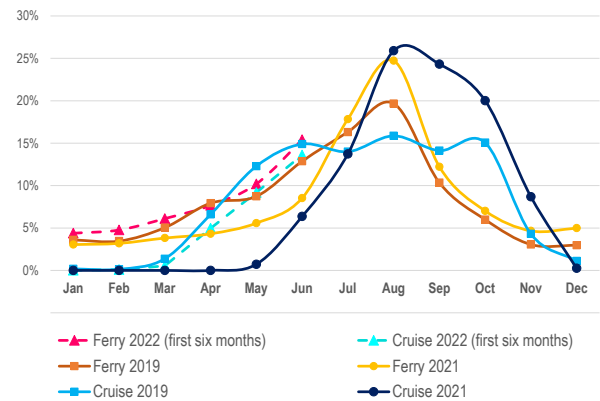
MARKET CONCENTRATION (PORTS TRAFFIC)

Concentration of cruise and ferry passenger movements in Adriatic ports, 2022



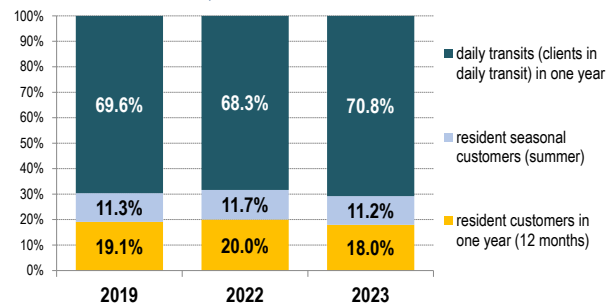
SEASONALITY (CRUISE AND FERRY)

Monthly share of cruise and ferry passenger movements of Adriatic cruise and ferry ports, 2019-2022

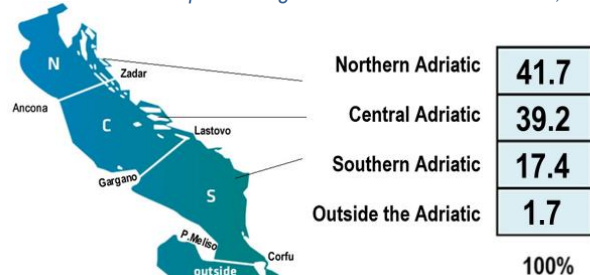


BOATING CLIENTS IN ADRIATIC

Distribution of the type of clients of the sample of marinas, 2019, 2022 and 2023 forecasts



The distribution of the itineraries chosen by the charter companies' customers of the sample* among the 4 areas of the Adriatic Sea, 2022



Note: (*) the 2022 panels count on 58 marinas and 23 charter companies

FERRY

SAIL & YACHT

Adriatic Sea Tourism Report

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Adriatic Sea Tourism Report 2022 - EXECUTIVE SUMMARY

	2022 CRUISE FORECASTS		Variations 2022 on 2019	
	Pax. mov.	Calls	Abs. Pax	Abs. Calls
Corfu	558,903	411	-208,770	-9
Kotor	400,000	444	-222,558	-20
Trieste	380,000	230	202,788	161
Dubrovnik	365,950	312	-402,974	-174
Bari	325,000	184	-355,021	-50
Split	320,000	288	-39,955	-215
Venice	245,000	196	-1,358,516	-301
Ravenna	150,000	100	134,179	67
Zadar	134,000	154	-49,034	23
Brindisi	122,000	61	35,904	19
Monfalcone	80,000	27	80,000	27
Koper	75,000	65	-40,581	-7
Ancona	60,000	38	-40,109	-16
Sarande**	51,708	27	-37,275	-4
Rijeka	24,215	14	-16,922	-10
Sibenik	22,177	67	3,043	50
Korcula	20,000	72	-15,957	-64
Bar	15,000	9	-5,000	-7
Rovinj	11,776	76	5,923	76
Monopoli	2,700	23	576	-2

CRUISE

2022 and 2023 cruise passengers forecast in Adriatic 2022/2019, 2023/2022 (in millions) and 2023/2019 variation



Notes: (*) 2022 and 2023 data are a forecast by Risposte Turismo. (**) Sarande data is an estimate by Risposte Turismo. Forecasts on passenger movements are based on cruise ports representing the 98% of the Adriatic total passengers and 97% of cruise calls.

2023 FERRY FORECASTS



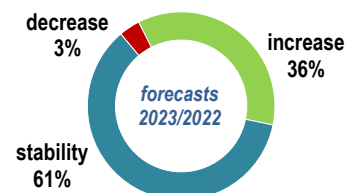
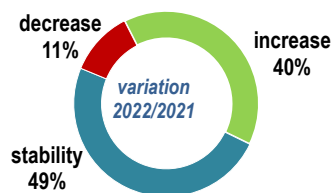
FERRY

Producing a forecast for ferry, hydrofoil, and catamaran traffic entails difficulties of estimation, given several factors. When considering 2022, Risposte Turismo estimates that the Adriatic area will reach almost 18 million passengers carried with 81,000 ship calls, a threshold that will be passed next year.

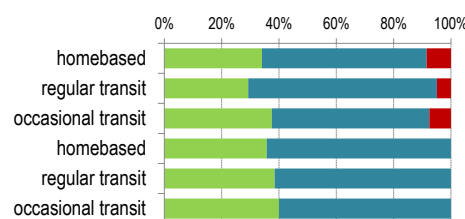
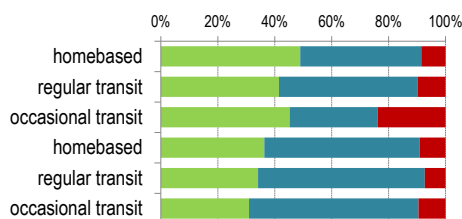
14 Adriatic ports provided forecasts for 2023, including the main ports of the top 20 ranking for 2022. Compared to the current year, an increase in the overall Adriatic traffic is expected, though slightly in most of the cases (Dubrovnik +3%, Zadar +4%, Bari/Brindisi +10%), while many ports pointed to stability. No one fears a reduction of ferry traffic.

SAIL & YACHT

Variations in clientele of interviewed marinas in Adriatic, 2022/2021 and 2023/2022 forecasts

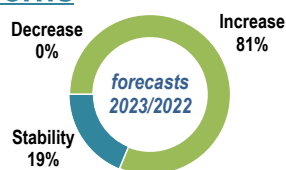
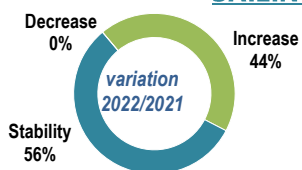


Domestic (same country)
International

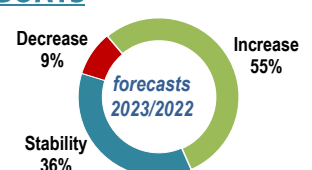
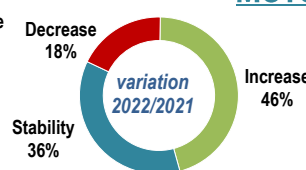


Variations in clientele of interviewed charter companies in Adriatic, 2022/2021 and 2023/2022 forecasts

SAILING BOATS



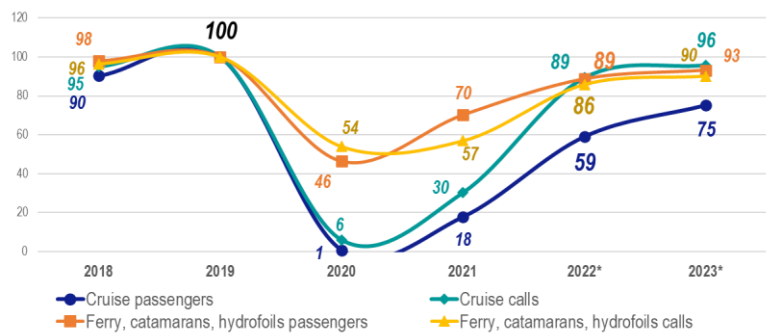
MOTORBOATS



CRUISE & FERRY

The indexed graph beside shows both cruise and ferry traffic using the results in 2019 as value 100. It is possible to notice the very strong drop in cruise traffic while instead the ferry held also in 2020. Cruising starts its recovery between 2021 and 2022 in particular in terms of number of ships cruising the Adriatic while the volume of passenger movements has lower indexed values (the blue line). The first 2023 estimates all indicate growing values in comparison to 2022 but still not an indicator will fully recover reaching the 2019 records.

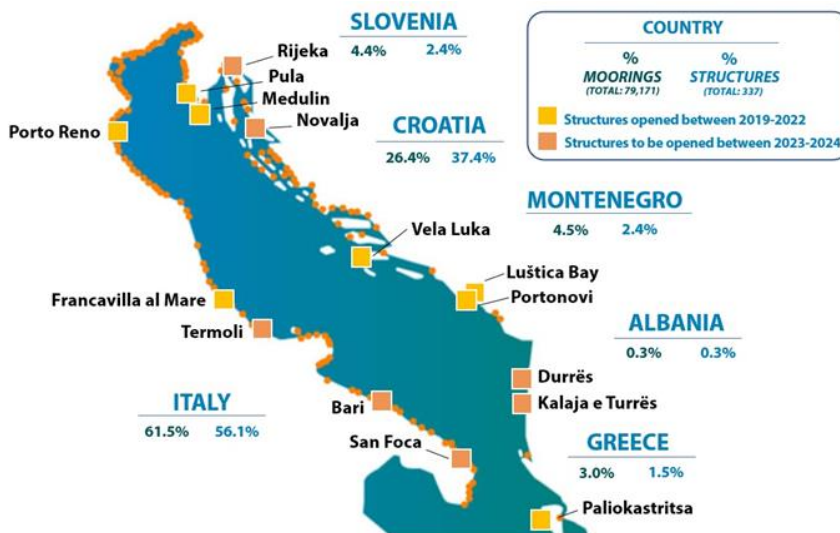
Cruise and ferry traffic in Adriatic (indexed value 2019 = 100)



SAIL AND YACHT

NEW STRUCTURES IN THE ADRIATIC FOR NAUTICAL TOURISM

Analysis of the nautical sector of the Adriatic area points to overall growth in the number of marinas and tourist ports, driven by Croatia, which inaugurated 3 new marinas over the last three years, and which plans to open 2 more (and expand as many) by 2024 – followed by Italy and Montenegro (with two). Considering both enlargements of marinas and brand-new structures, it is estimated that at least 40 million euros have been invested in the last two years, with an increase of 8 marinas and around 4,000 berths. In the next two years – from the second half of 2022 until 2024 – the Adriatic coast should count on 9 new marinas (including the two expansion projects) and more than 3,000 new berths, with investments of more than 100 million euros.



The quantitative increase of structures berths is equal to +1.5% and +5.5% respectively, compared to the first half of 2019. However, this increase is much more significant from a tourism point of view, as it shows how increasingly large – and ambitious – are the projects and investments that specifically target tourists. If all the projects announced for the next two-year period are actually brought into being, it will be possible to surpass the threshold of 80,000 berths on the Adriatic (+9.6% vs the first half of 2019).

Source: Risposte Turismo, Adriatic Sea Tourism Report (2022).

Adriatic Sea Tourism Report and Adriatic Sea Forum are projects by



Full report available on
www.adriaticseaforum.com

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