

# ADRIATIC SEA TOURISM REPORT

## 2024 EDITION

### EXECUTIVE SUMMARY

#### MARITIME TOURISM IN THE ADRIATIC SEA UP TO THE 2024 THRESHOLD

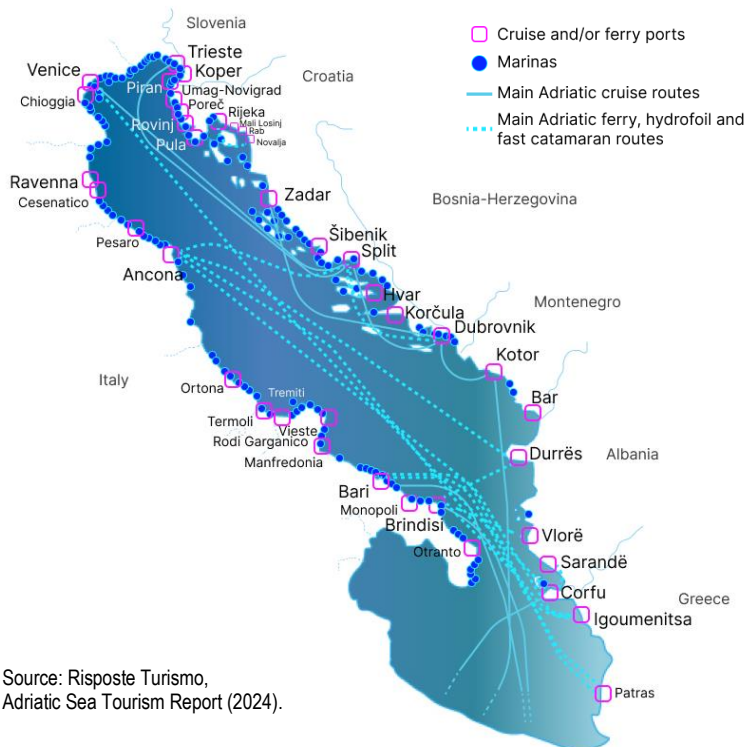
Since 2013, Adriatic Sea Tourism Report (ASTR) has aimed to outline and provide an in-depth analysis and description of maritime tourism in the Adriatic Sea. The report offers quantitative and qualitative information on the three sectors of maritime tourism in the Adriatic: cruise, ferry, and sail & yachting tourism, providing a common framework for understanding the dynamics of what is happening in the Adriatic.

This report is the result of information and data collection carried out directly by Risposte Turismo thanks to extensive dialogue and collaboration with several Adriatic stakeholders, including ports and marinas (individual and networks), passenger terminals, charter operators, navigation and tourism companies, national institutes of statistics, individual tourism destinations, public administrations and tourist boards. ASTR also contains the results of analysis, research, studies of data and info regarding traffic, investments, demand, supply, and plans within the maritime tourism sectors in the area.

The 2024 edition of the report consists of four chapters, an introductory one plus a further three, each of which focuses on the cruise, ferry, and sail & yachting sectors, with graphs, tables, maps and an examination of the movements of tourists by sea, directions, dimensions and behaviours. The report features estimates on traffic, including, for the first year, one related to the tourist component of nautical traffic, as shown on the map below.

The Adriatic is a wonderful macro-region, offering historical, landscape and cultural treasures and multiple recreational resources and opportunities, making it an ideal destination for many different segments of tourists. The area welcomes tourists, starting from those who live in the Adriatic countries, who, on their travels, are able to recognise common elements, together with a rich cultural variety that generates wealth. Nevertheless, this is a destination that continues to record results below its potential.

#### Maritime tourism in the Adriatic Sea in 2024 at a glance: Adriatic gates and routes



**more than 30 cruise ports**  
**4.9 million passenger movements**  
**and 3,251 cruise calls**

**more than 30 ferry ports**  
**20.7 million passengers,**  
**5.5 of them on international routes**

**344 structures for boat tourism**  
**more than 500,000 nautical tourist movements**  
**+80,000 moorings**

Source: Risposte Turismo,  
Adriatic Sea Tourism Report (2024).

## EXECUTIVE SUMMARY

### MARITIME TOURISM MOVEMENTS IN ADRIATIC COUNTRIES

Cruise traffic by country, absolute values and % share, 2024

PORTS	2024		Share % on total	
	Country	Pax. mov.	Calls	Pax. mov.
ITALY*	2,004,975	882	40.7%	27.1%
CROATIA	1,375,669	1,316	28%	40.5%
GREECE*	736,858	413	15%	12.7%
MONTENEGRO	657,184	499	13.4%	15.3%
SLOVENIA	125,485	97	2.5%	3%
ALBANIA	21,578	44	0.4%	1.4%
BOSNIA-HERZEGOVINA	-	-	-	-
<b>TOTAL 2024</b>	<b>4,921,749</b>	<b>3,251</b>	<b>100%</b>	<b>100%</b>

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

Ferry, hydrofoil and fast catamaran passenger movements by country, absolute values and % share, 2024

PORTS	2024		Share % on total	
	Country	Pax. mov.	Calls	Pax. mov.
CROATIA	10,502,279	45,018	50.8%	53.5%
GREECE **	5,537,532	28,433	26.8%	33.8%
ITALY **	3,048,302	5,973	14.7%	7.1%
ALBANIA	1,576,010	4,610	7.6%	5.5%
SLOVENIA	13,348	149	0.1%	0.2%
MONTENEGRO	n.a.	n.a.	n.a.	n.a.
BOSNIA-HERZEGOVINA	0	0	0.0%	0.0%
<b>TOTAL 2024</b>	<b>20,677,471</b>	<b>84,183</b>	<b>100%</b>	<b>100%</b>

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, 2024

Country	Berths		Structures		Avg. berths per structure**
	value	% share	value	% share	
ITALY*	49,262	61.1%	192	55.8%	257
CROATIA	21,291	26.4%	128	37.2%	166
MONTENEGRO	3,759	4.7%	9	2.6%	418
SLOVENIA	3,521	4.4%	8	2.4%	440
GREECE*	2,647	3.2%	6	1.7%	441
ALBANIA	200	0.2%	1	0.3%	200
BOSNIA-H.	0	0.0%	0	0.0%	n.a.
<b>TOTAL</b>	<b>80,680</b>	<b>100%</b>	<b>344</b>	<b>100%</b>	<b>235</b>

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

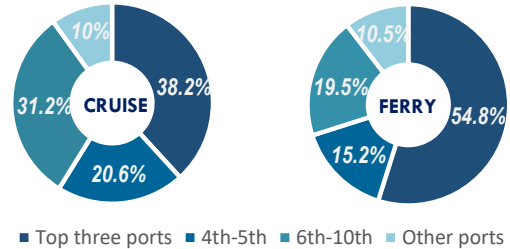
Berths, structures and the average of berths per structure in the Adriatic areas, 2024

Area	Berths % share	Structures % share	Avg. berths per structure
NORTH	56.4%	57.8%	229
CENTRE	19.9%	19.2%	243
SOUTH	23.7%	23.0%	242
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>	<b>235</b>

Notes: (\*) the values are rounded either up or down to whole numbers.

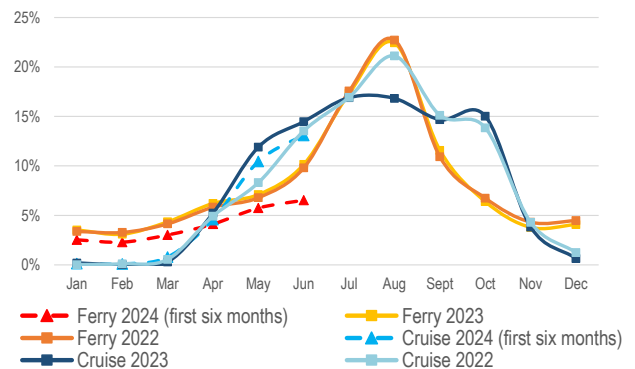
### MARKET CONCENTRATION (PORTS TRAFFIC)

Concentration of cruise and ferry passenger movements in Adriatic ports, 2024



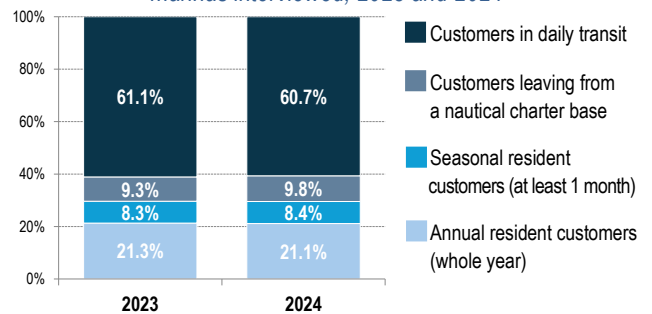
### ADRIATIC SEASONALITY

Monthly share of cruise and ferry passenger movements of Adriatic cruise and ferry ports, 2022, 2023, and first semester 2024



### BOATING CLIENTS IN ADRIATIC

Distribution of the type of customers in the marinas interviewed, 2023 and 2024



The distribution of the itineraries chosen by the charter operators' customers among the four areas of the Adriatic Sea, 2024



CRUISE

FERRY

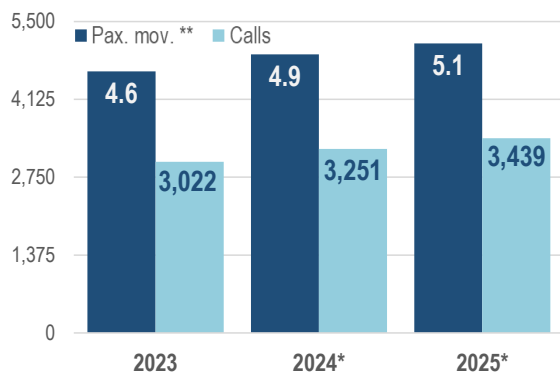
SAIL & YACHT

ADRIATIC SEA TOURISM REPORT 2024 - EXECUTIVE SUMMARY

	2024 Cruise forecast		Variations 2024 on 2023	
	Pax. mov.	Calls	Abs. Pax	Abs. Calls
Corfu	729,000	385	61,818	32
Kotor	609,092	485	104,016	51
Dubrovnik	542,652	387	16,238	3
Venice	540,000	240	44,114	15
Trieste	475,000	158	-1,727	0
Bari	473,200	169	55,841	0
Split	465,000	366	76,796	61
Ravenna	257,493	87	-73,459	-12
Zadar	220,000	220	45,352	61
Koper	120,000	74	-538	-4
Brindisi	104,215	60	30,576	15
Ancona	99,000	54	11,173	6
Chioggia	50,000	34	3,682	0
Bar	48,092	14	6,187	-7
Rijeka	44,566	30	6,873	10
Šibenik	35,826	83	5,998	-8
Hvar	26,055	n.a.	2,219	n.a.
Korčula	20,500	111	-2,127	6
Sarandë	19,200	21	1,625	-6
Rovinj	17,644	98	912	24

## CRUISE

Adriatic passenger movements and cruise calls share of the Med, absolute values, 2023, 2024 ad 2025 forecasts



Notes: (\*) 2024 and 2025 data are a forecast by Risposte Turismo; (\*\*) the values of passengers are expressed in millions.

## 2025 FERRY FORECASTS



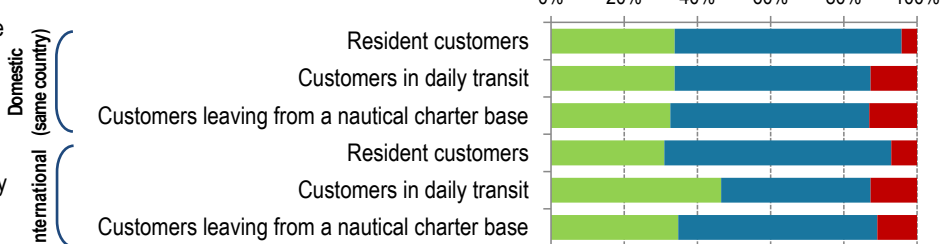
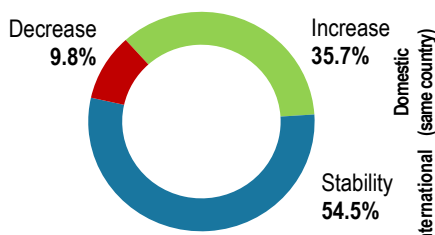
## FERRY

Estimates for 2024 were not straightforward, as requests for statistics on this type of traffic often meet with a lack of data collection by some ports, which does not always correlate with port size or traffic volume. Because of this, forecasting ferry, hydrofoil and fast catamaran traffic for 2025 poses several challenges.

As shown on the map, traffic forecasts vary depending on the coastline. While main Italian ports pointed to stability, those on the opposite coast, particularly Croatian and Albanian ports, expect a slight rise in traffic compared to the year before (e.g. Split +2.5%, Zadar +2%).

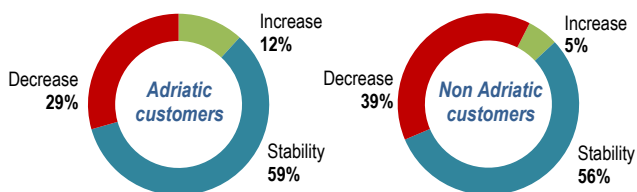
## SAIL & YACHT

### Variations in the clientele of interviewed marinas in the Adriatic, 2024 on 2023

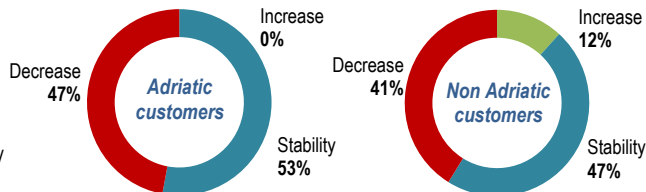


### Variations in rentals by the interviewed charter operators' clientele, 2024 on 2023

#### < 14 MT. BOATS RENTAL



#### ≥ 14 MT. BOATS RENTAL



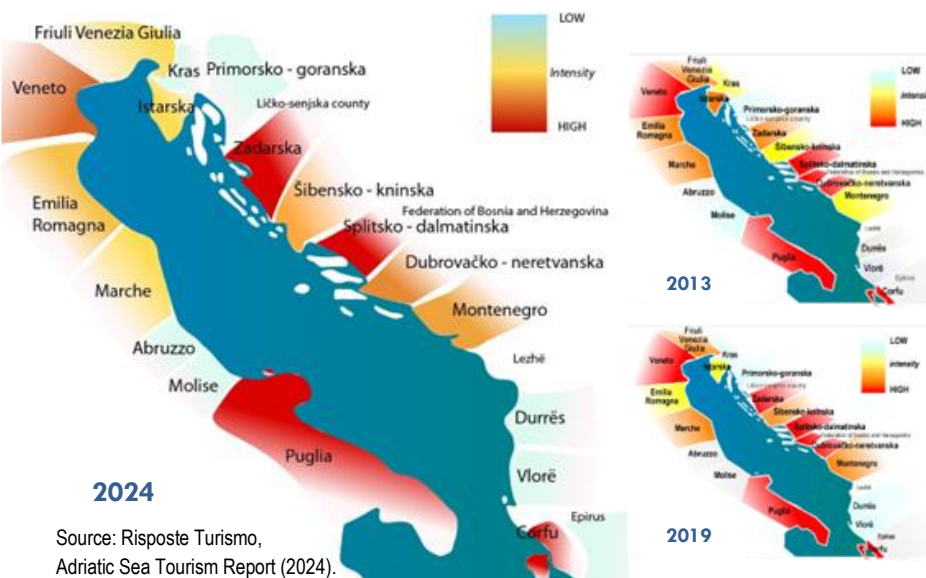
### INVESTMENTS



Source: Risposte Turismo, Adriatic Sea Tourism Report (2024).

The Adriatic Sea and its coastline remain an area where the various tourist ports and marinas, along with the respective Port Authorities and terminal operators, continue to invest with the aim of improving and enhancing the quality of services and infrastructures. At least around 190 million euros will be invested in the next few years to build new marinas and tourist ports, or to enlarge existing ones, while not less than 200 million euros will be invested in the construction of passenger terminals and other facilities for cruise and ferry traffic.

### A COMMON FRAMEWORK



Source: Risposte Turismo, Adriatic Sea Tourism Report (2024).

The larger map illustrates the current estimated intensity of maritime tourism as a combination of the three components (cruise, ferry, sail and yacht) in each Adriatic region, compared to the intensity that Risposte Turismo's team recorded in 2013 and 2019 (shown in the smaller maps). It highlights how traffic and activities are (or are not) distributed and balanced across various areas, and how the regions can benefit from maritime tourism. The aim is to understand whether an area has maritime tourism gaps to be filled through addressing investments, activities, programmes or initiatives, while considering that each region may have its own priorities and aims. Puglia, Split, Corfu, and Zadar show high-intensity maritime tourism, with Zadar experiencing growth in all sectors compared to 2013. In contrast, regions such as Veneto and Dubrovnik are seeing a decline, mainly due to a reduction in cruise traffic.

Adriatic Sea Tourism Report and Adriatic Sea Forum are projects by



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