ADRIATIC SEA TOURISM REPORT

2017 EDITION

EXECUTIVE SUMMARY

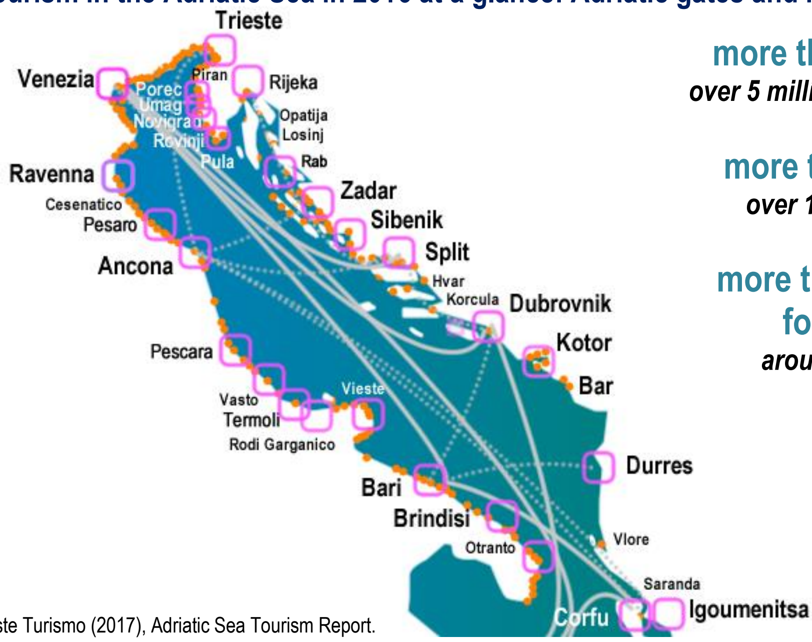
MARITIME TOURISM IN THE ADRIATIC SEA

The 5th edition of Adriatic Sea Tourism Report (ASTR) continues the annual analysis and description of maritime tourism in the Adriatic Sea, with information and data that have been updated every year since the first edition in 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 dialogues 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, single tourism destinations, public administrations and tourism boards. ASTR contains also the results of analysis, researches, studies of data and info regarding traffic, investments, demand, supply, plans, strategies, priorities and obstacles within the maritime tourism sectors in the area.

The 2017 edition of the report contains – in addition to methodology and the introduction – 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. The final chapter this year is dedicated to report opinions, considerations, suggestions and thoughts about the Adriatic and its maritime tourism, collected from experienced stakeholders. The report also includes a box focused on coastal tourism in the Adriatic, a setting so closed to the maritime one, with new info and data about tourism flows and bed availability in the municipalities of the 7 countries facing the Adriatic. Again this year a double ad-hoc survey on the nautical sector was conducted in the early months of 2017 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, but the overall results still do not appear aligned with the potentialities.

Maritime tourism in the Adriatic Sea in 2016 at a glance: Adriatic gates and routes



Source: Risposte Turismo (2017), Adriatic Sea Tourism Report.

more than 30 cruise ports
over 5 million passenger movements

more than 40 ferry ports
over 17 million passengers

more than 330 structures for boat tourism
around 80,000 moorings

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CRUISE

MARITIME TOURISM MOVEMENTS IN ADRIATIC COUNTRIES

Cruise traffic by country, absolute values and share %, 2016

PORTS	2016		Share % on total	
Country	Pax. mov.	Calls	Pax. mov.	Calls
ITALY*	2,260,364	843	44.6%	22.6%
CROATIA	1,376,532	1,697	27.2%	45.5%
GREECE*	757,282	490	15.0%	13.1%
MONTENEGRO	543,892	500	10.7%	13.4%
SLOVENIA	79,562	80	1.6%	2.1%
ALBANIA	46,743	117	0.9%	3.1%
BOSNIA-HERZEGOVINA	0	0	0.0%	0.0%
TOTAL 2016	**5,064,375**	**3,727**	**100%**	**100%**

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

FERRY

Ferry, hydrofoil and fast catamaran passenger movements by country, absolute values an d share %, 2016

PORTS	2016		Share % on total	
Country	Pax. mov.	Calls	Pax. mov.	Calls
CROATIA	8,872,444	47,928	50.3%	57.3%
GREECE*	4,586,337	25,272	26.1%	30.2%
ITALY*	2,824,858	7,100	16.0%	8.5%
ALBANIA	1,288,988	2,990	7.3%	3.6%
MONTENEGRO	35,925	160	0.2%	0.2%
SLOVENIA	14,040	151	0.1%	0.2%
BOSNIA-HERZEGOVINA	0	0	0.0%	0.0%
TOTAL 2016	**17,622,592**	**83,601**	**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.

SAIL & YACHT

Values and shares of berths and structures in Adriatic by country, 2017

	Berths		Structures		Avg. berths per structure**
	value	% share	value	% share	
ITALY*	48,642	62.2%	188	56.8%	259
CROATIA	20,221	25.8%	122	36.9%	166
SLOVENIA	3,470	4.4%	8	2.4%	434
MONTENEGRO	3,450	4.4%	8	2.4%	431
GREECE*	2,255	2.9%	4	1.2%	564
ALBANIA	200	0.3%	1	0.3%	200
BOSNIA-H.	0	0.0%	0	0.0%	n.a.
TOTAL	**78,238**	**100%**	**331**	**100%**	**236**

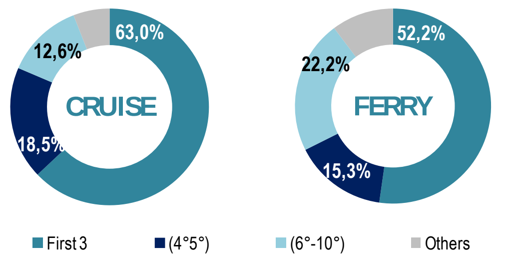
Notes: (*) both for Italy and Greece, only their Adriatic ports have been considered; (**) the values are rounded either up or down to whole numbers.

Berths, structures and the average of berths per structure in the Adriatic areas, 2017

	Berths % share	Structures % share	Avg. berths per structure
NORTH	55.9%	58.6%	225
CENTRE	20.6%	19.3%	252
SOUTH	23.5%	22.1%	252
	100%	**100%**	**236**

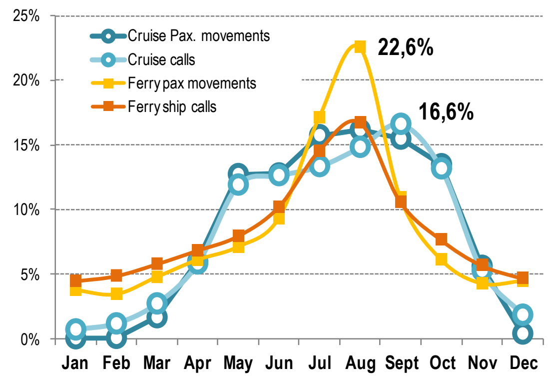
MARKET CONCENTRATION
(PORTS TRAFFIC)

Concentration of cruise and ferry passenger movements in Adriatic ports, 2016



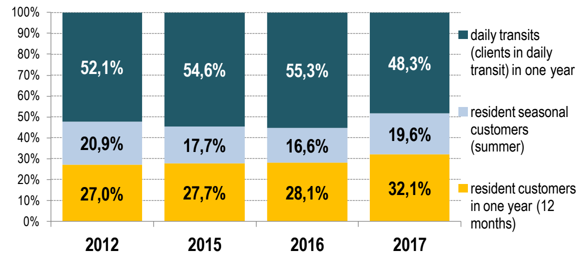
ADRIATIC SEASONALITY

Monthly share of cruise and ferry passenger movements and cruise and ferry calls of Adriatic cruise and ferry ports, 2016



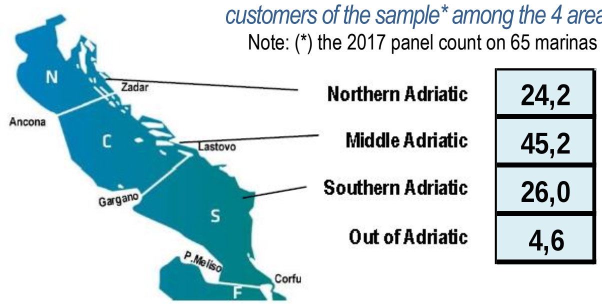
BOATING CLIENTS IN ADRIATIC

Distribution of the type of clients of the sample of marinas, 2012, 2015, 2016 and forecasts, 201*



The distribution of the itineraries chosen by the charter companies customers of the sample among the 4 areas of the Adriatic Sea, 2016*

Note: (*) the 2017 panel count on 65 marinas and 24 charter companies



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2017 CRUISE FORECASTS			Variations 2017 on 2016			
	Pax. mov.	Calls	% Pax. mov.	% Calls	Abs. Pax	Abs. Calls
ANCONA	54,900	31	stable	-8.8%	stable	-3
BAR	9,270	8	7.0%	14.3%	610	1
BARI	400,000	134	-0.2%	-7.6%	-875	-11
BRINDISI	105,800	40	1,907.6%	185.7%	100,530	26
CORFU	635,000	408	-15.2%	-15.2%	-113,916	-73
DUBROVNIK	744,598	537	-10.7%	-16.0%	-88,990	-102
IGOUMENITSA	11,986	12	57.2%	71.4%	4,363	5
KOPER	71,000	60	-10.0%	-13.0%	-7,923	-9
KOTOR	500,000	459	-6.6%	-6.9%	-35,232	-34
OPATIJA	2,688	10	-20.8%	-44.4%	-704	-8
PULA	12,000	62	118.3%	226.3%	6,502	43
RAVENNA	50,000	49	9.6%	11.4%	4,387	5
RIJEKA	14,000	14	0.9%	-6.7%	124	-1
ROVINJ	18,000	67	stable	stable	stable	stable
SIBENIK	30,000	120	144.4%	13.2%	17,724	14
SPLIT	270,000	229	-3.0%	-19.6%	-8,259	-56
VENICE	1,422,000	473	-11.4%	-10.6%	-183,660	-56
ZADAR	130,000	110	-4.7%	-3.5%	-6,462	-4

CRUISE

-6.51% on 2016

-8.01% on 2016

Notes: forecasts on passenger movements are based on 18 ports data (representing the 94.7% of the total traffic registered in 2016) while cruise calls also on other 8 ports data, not shown in the table, for a total of 26 ports.

2017 FERRY FORECASTS

FERRY

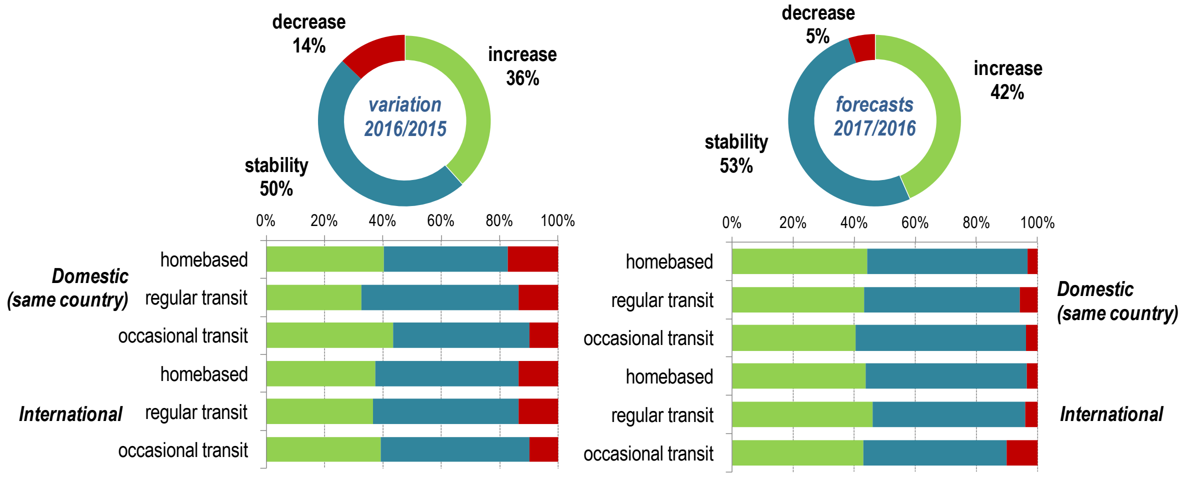
These indications and forecasts have been provided by ports that represent little more than half of 2016 total traffic (58%), therefore it should not be prudent to apply their expectations on the overall ferry traffic in the Adriatic. Anyway considering some positive and negative variations and other stable situations, we consider reasonable to forecast for 2017 a little higher traffic on 2016 in terms of passenger movements and calls.

+1.5% on 2016

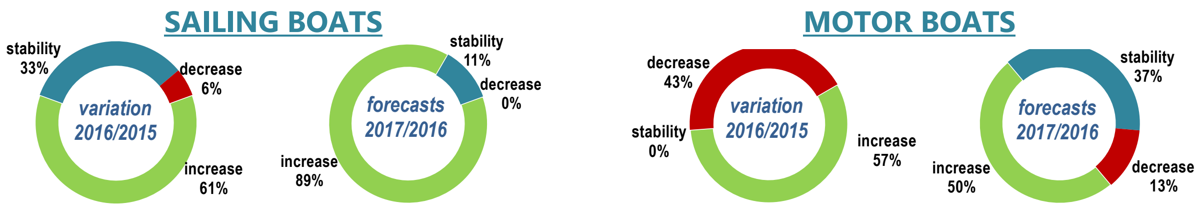
+0.3% on 2016

SAIL & YACHT

Variations in clientele of interviewed marinas in Adriatic, 2016/2015 and forecasts, 2017/2016



Variations in clientele of interviewed charter companies in Adriatic, 2016/2015 and forecasts 2017/2016



TOWARDS THE ADRIATIC DEVELOPMENT

The starting point for the ASF project as a whole lies in our company belief that, from the point of view of organising and fostering the tourism offer, the Adriatic Sea deserves more attention and commitment. Efforts should aim to, from the quali-quantitative angle, improve on the results achieved to date – with potential benefits for nations as a whole, local communities, companies and individual operators. This conviction should translate into an ambitious project capable of pooling not just good intentions but also the commitment and action of tourism-industry operators and other players and organisations.

Compared to other phenomena and sectors, maritime tourism – and its components – might emerge as the major driver and protagonist of such developments and potential outcomes, namely a stronger Adriatic from the tourism angle. In terms of tourism demand, notable drawing power is exerted by the wealth of assets of the many towns, cities and so forth that look over the Adriatic Sea. Assets of natural-history interest, landscapes and sights and locations of historical, artistic and architectural interest, not to mention the bustling social and cultural life of the various peoples of the area. However, the true common denominator for this large variegated zone – with all its exuberance – is its expanse of water. The various maritime tourism solutions may therefore became the symbolic focal point and the strength to promote the area. A promotion that shall also benefit the rich tourism offer to be found in the coastal districts themselves, and their hinterlands.

Within the Adriatic Sea Tourism Report 2017 production, we have collected various viewpoints from professional stakeholders endowed with experience and vision. Some of the outcomes are listed below.

- The most recurrent cited **advantages** of the Adriatic are: beauty, wealth of assets, history, climate, personal safety, weather conditions, infrastructures and services of ports and marinas, many regions for a full variety of tourism options.
- **What's missing** as regards the area: limited dialogue and limited propensity for engagement and collaboration among the various governmental and administrative bodies, needed improvement of port infrastructures and services for ships, provision of environmental safeguards.
- Regarding the **branding** topic, it is a widely shared opinion that the Adriatic is not recognised at present as a brand, logo or name capable of immediately evoking a set of values, or propositions or opportunities for visiting and discovering localities.
- Some operators are convinced that the Adriatic is already a **destination**, while others firmly believe that, actually, it is just a "container" of other more specific destinations already well known. Opinions converge over the fact that the Adriatic (with its various eastern, western, northern and southern zones) does merit a project that is capable of ascribing to the area as a whole a real identity as a destination.
- The generally accepted view is that – among nations, regions or cities and suchlike entities – there is a lack of will to work together. Even in the presence of a shared-commitment project, the internal competition would remain: indeed, it would spur us on to '**go the extra mile**'.
- A **jointly promotion** of the Adriatic may exploit the fame and renown of certain destinations in this area but should also go beyond this limited ambit, and foster a broader and more adequately articulated tourism offer. The core issue concerns, on the one hand, establishing what can and should be done centrally – thus clarifying objectives, processes, backup investments and responsibilities – in order to further Adriatic coordination, and, on the other, establishing what can and should be done locally.

The overall impression is that everyone is waiting for someone to make the first move, to offer their services – armed with an idea, a solution, a plan of action – as a pivot and facilitator for a long-term project whose aims are to highlight and showcase not only the qualities of the Adriatic Sea and of the maritime tourism sector, but also the extraordinary beauty of this part of the world.

Adriatic Sea Tourism Report and Adriatic Sea Forum are projects by

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