

PRESS RELEASE

ADRIATIC SEA FORUM: Dubrovnik today sees the opening of the second edition of the Adriatic Sea Forum – cruise, ferry, sail & yacht, a travelling international event dedicated to the sea tourism sector in the Adriatic.

Presentation of the new edition of the Adriatic Sea Tourism Report: in 2015, approx. 4.89 million cruise passengers (up 5.05% on 2014) are expected to pass through the ports in the Adriatic.

The number of ferry passengers passing through the ports considered is expected to remain stable at the end of (up 0.32% on 2014).

325 marinas identified in the areas, adding up to a total of approx. 80 thousand berths. 2015 is expected to see a rise in the turnover of the marinas and the charter companies operating in the area.

This morning, Dubrovnik played host to the opening of the second edition of the Adriatic Sea Forum - cruise, ferry, sail & yacht, the international travelling event dedicated to the sea tourism sector in the Adriatic devised by Risposte Turismo, a research and consultancy company for the tourism macro industry.

The Forum, organised this year in partnership with the Port Authority of Dubrovnik, the Municipality of Dubrovnik, Dubrovnik Tourist Board and ACI Club, aims to offer participants the chance to meet and work together to encourage the creation or further development of shared actions and projects, as well as the opportunity to study, discuss and analyse the potential of the Adriatic as an outstanding tourist destination for maritime tourism.

Following an introductory address and a brief presentation of the host city by Andro Vlahušić, the Mayor of Dubrovnik, the forum moved on to the plenary opening session entitled "*The Adriatic: a sea, a destination, a brand*".

This session, which saw the participation of Maja Pak, Head of the Research and Development Sector of Spirit Slovenia (an agency for the promotion of business, innovation, development, investments and tourism); Cristiano Radaelli, Special Commissioner of the Italian National Agency of Tourism ENIT, and Željka Radak Kukavcic, Director of the National Tourism Organisation of Montenegro, included a discussion on how useful it could effectively be to promote the Adriatic as a single tourist destination, in order to boost the positive impact on the various countries in the area.

Although the speakers expressed a favourable opinion, it was highlighted that the word "Adriatic" hardly appears in any of the promotional materials of the countries that look onto it.

Also highlighted during the session was the need to identify tools able to help promote the Adriatic as a brand.

In the afternoon, when work resumed, Francesco di Cesare – President of Risposte Turismo – presented the new edition of the Adriatic Sea Tourism Report, the benchmark research report on sea tourism in the Adriatic in the cruise, ferry, sail & yacht sectors, drafted by Risposte Turismo.

As regards cruise traffic, the study conducted by Risposte Turismo indicates that in 2015, approx. 4.89 million passengers will pass through the cruise ports of the Adriatic (up 5.05% on 2014), with 3.072 calls (+ 8.47%).

These figures come from the projection made by Risposte Turismo on forecasts regarding, respectively 15 and 20 cruise ports in the Adriatic, which together accounted, in 2014, for 86.7% of the total amount of passengers carried and almost 100% of the calls.

It should be noted that this increase will not offset the fall in passenger cruise traffic registered in 2014 (down 10.9% on 2013) and that the upturn expected in the Adriatic will be below the general recovery forecast by Risposte Turismo for Italy as a whole for the end of 2015 (up 5.4% on 2014).

If we look at the individual ports, at the end of 2015, Venice is expected to maintain its top position, with some 1.63 million di cruise passengers carried (-5.7%) and 525 calls (+7.6%), followed by Dubrovnik, with approx. 870 thousand cruise passengers (+3.1%) and 584 calls (+1.2%) and Corfu, with 670 thousand cruise passengers (stable) and 405 calls (+2.5%).

With regard to cruise traffic per country, the new edition of the Adriatic Sea Tourism Report confirms that in 2014, Italy topped the list with approx. 2.4 million cruise passengers (52.6% of the total for the area) and 768 calls (27.1% of the total), followed by Croatia (approx. 1.1 million cruise passengers, i.e. 24.9% of the total and 1247 calls, i.e. 44% of the total) and Greece (approx. 676 thousand cruise passengers, i.e. 14.5% of the total, and 410 calls, i.e. 14.5% of the total).

Moving on to the ferry sector, the report contains an analysis of passenger numbers and calls in 40 ports in the Adriatic.

The forecasts for 2015 for 15 ports, accounting for 58.4% of the total number of passengers carried in 2014, show a situation that remains largely stable compared to the previous year (17.31 million passengers, +0.32%), and a similar result is also expected for the number of calls by the end of the year (up 0.98% to an estimated 80,600).

Specifically, among the ports examined, Split is expected to close 2015 with a figure of over 4 million passengers carried (+3%), Zadar with approx. 2.2 million (-3.2%), Corfu with over 1.5 million (stable) and Ancona with just over 1 million (stable).

Based on the analysis of passenger numbers per country, the Adriatic Sea Tourism Report has confirmed, for 2014, the leadership position of Croatia, with just over 9 million passengers carried (accounting for 52.5% of overall traffic in the Adriatic area) and approx. 46 thousand calls (accounting for 57.4% of the total calls registered).

Behind Croatia comes Greece, with just over 4 million passengers (23.5% of the total), and approx. 25 thousand calls (31.1% of the total), followed by Italy, which in 2014 registered over 2 million passengers carried (17.9% of the total) and approx. 7 thousand calls (9% of the total).

In addition to cruises and ferries, the 2015 edition of the Adriatic Sea Tourism Report offers a broad overview of the whole sea tourism sector, dedicating ample attention to the boating sector. The survey work initiated in the first edition of the report in 2013 has continued, with the mapping of 325 marinas with a total of 78 thousand berths, with the average of about 240 berths remaining stable compared to 2014.

Among the countries facing onto the Adriatic, Italy is once again the country with the largest number of marinas (181, i.e. 55.7% of the total) and berths (48,900, i.e. 62.5% of the total).

Alongside Italy on the podium are Croatia (127 marinas and approx. 20,500 berths) and Slovenia – Montenegro, with, respectively, 6 and 8 marinas and 2993 and 2893 berths.

The report also contains forecasts for 2015 regarding the turnover of a sample of 70 marinas and 20 charter companies in the Adriatic.

Both samples show strongly optimistic signs for the current year, with figures expected to remain stable or increase.

Specifically, as regards the marinas, 53% of those interviewed expect to see the value of visitors remaining stable, while 36% expect to see an increase, while as far as charter companies are concerned, 67% of the sample expects to see a rise in yachts, increasing to 83% for motorboats.

Day one of the Forum continued with a keynote speech by John Tercek, Vice-President for New Business Development at Royal Caribbean Cruise Line, in which he will present an analysis of the infrastructures dedicated to the cruise industry in the Adriatic, and two parallel sessions dedicated, respectively, to the future of the nautical sector in the areas (*"Which future for the nautical sector in the Adriatic?"*) and to the creation of new ferry links (*"Focus ferry: building new routes"*).

"The figures presented today on maritime tourism in the Adriatic, a selection of the more detailed results contained in the new edition of the Adriatic Sea Tourism Report, show a positive turnaround for the cruise industry in 2015, confirming the upturn – modest for the moment - in ferry traffic and in the confidence of operators in an increase in business in the nautical sector, also characterised by continual investments right along the Adriatic coast".

"These signals," di Cesare continued, "are not sufficient to close the significant gap that remains between the potential of the Adriatic as a destination and a scenario for tourism and the results achieved so far. This gap could be closed by working on a medium-to-long-term project able to give the Adriatic as a destination its own distinctive image, positioning and brand and to present the Adriatic as a single destination composed of a number of distinct areas".

"It is in this direction," concluded di Cesare, "that operators and public decision-makers should be moving, and it is on this path that we find the Adriatic Sea Forum, which – once again in this second edition – wishes to help give the Adriatic area the prominent role it deserves on the international tourist scene".

The Forum will continue tomorrow morning with two plenary sessions dedicated, respectively, to the guiding role to be played by the cruise industry in the development of the Adriatic (*"Cruise sector to lead Adriatic development"*), and to the marinas in the area (*"The marinas on the Eastern and Western coasts of the Adriatic"*). It will then close with a plenary session entitled *"The sustainable economic growth of the Adriatic"*.

The detailed programme of the event can be found on the website www.adriaticseaforum.com

Contact: Barabino & Partners
Jacopo Pedemonte
Tel: +39 010.272.50.48
Cell: +39 347.06.91.764
Email: j.pedemonte@barabino.it

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