

# ADRIATIC SEA TOURISM AGENDA

Last update June 18<sup>th</sup>, 2019

Besides being an opportunity for debates, meetings and business networking, the fourth edition of *Adriatic Sea Forum – cruise, ferry, sail & yacht*, held in Ancona in May, 30<sup>th</sup> – 31<sup>st</sup>, has also launched **Adriatic Sea Tourism Agenda**: the initiative has been conceived as an open and shared platform of ideas, solutions and possible initiatives to **promote the development of maritime tourism in the Adriatic**. It targets all the stakeholders who believe in the potential of the sector in this area and want to be an active part in its sustainable future growth in the respect of both territories and local communities.

The Agenda aims to be the place to share and ease the direct realisation by operators - and group of operators and stakeholders - of projects that can have many purposes such as, for example, a better recognition of the **Adriatic brand** through common targeted **promotion** initiatives and the **awareness** raising of the European Union on issues of interest in order to develop and support the area.

Intervention **priorities** should be shared to allow the Adriatic to fully realise its potential, from the identification of possible areas of action to increase its **competitiveness** in the international tourism scenario to the need for stakeholders to work together in order to achieve **new growth horizons**.

Moreover, a path of **common actions** can be built ranging from operative marketing ones such as common strategies to support the sectors to face the competition of the neighbouring areas to initiatives as the identification of the best possible synthesis between protection and conservation of environmental resources and efficiency of production processes.

The Agenda starts from the results of the **three technical working tables** that gathered together professionals in the **cruise, ferry and boating industries** during the forum. Those intense debates offered participants the occasion to discuss several themes of crucial importance for the future of each sector in the Adriatic, to tackle current issues and list recommendations and priorities as to foster the Adriatic maritime tourism development.

The recognition made by Risposte Turismo in the new edition of Adriatic Sea Tourism Report, in fact, shows the potential of the Adriatic Sea as far as the discussed sectors are concerned.

**Map 1: Maritime tourism in the Adriatic Sea in 2019 at a glance: Adriatic gates and routes**



An historical record in **cruise passenger movements** in the area is expected by the end of 2019. There will be **5,52 million** passenger movements (embarkments, disembarkments and transits) in the Adriatic (+7,3% compared to 2018) and over 3 thousand ship calls (+7,2%). Also the forecasts for **ferries, hydrofoils and catamarans** present a positive situation: the current year should experience an increase compared to the already positive results registered in 2018 with **19,74 million passenger movements**, (+2,4% compared to 2017), the biggest one in the last 10 years. As for **nautical tourism**, nowadays the offer in the seven countries on the Adriatic Sea consists of **332 operative marinas** with approximately **75 thousand berths**. Over the next two years new investments are expected, adding other 2.570 berth to the current offer.

The scenario described in Adriatic Sea Tourism Report clearly conveys an idea of possible development and improvement of the Adriatic maritime tourism, thus connecting to the aims proposed by the Agenda.

The Agenda **aims to enrich itself over time** with new contributions and reflections by those operators working in the area. If you want to be updated on possible further steps of the Agenda write us at **agenda (at) adriaticseaforum.com to be included** in the e-mail newsletter.

The focuses that follow – one for each sector – are just the beginning of a development **tool for comparison, sharing and creations of a common strategy for the Adriatic**.

## WHICH WILL BE THE NEXT STEPS?

- **Diffusion of Adriatic Sea Tourism Agenda to relevant stakeholders.**
- **Creation of a private LinkedIn group on invitation (all participant at Adriatic Sea Forum will receive the invitation > requests at [www.linkedin.com/groups/8798837](http://www.linkedin.com/groups/8798837));**
- **Collection of eventual further proposals and recurrent updates of the agenda for minor updates;**
- **Diffusion of the updated Agenda in case of major updates or launch of initiatives with a dedicated e-mail newsletter.**

## WHAT CAN YOU DO NOW?

- **Share this document with relevant stakeholders and invite them to send us an email asking to receive future news about the initiative;**
- **Express your interest in trying to achieve one of the possible initiatives either informing us by email that you are working in one of those fields or dialoguing with other Adriatic stakeholders and telling us about it in order to enable further connections;**
- **Suggest further possible initiatives, comments, news, issues to be considered by writing an e-mail > [agenda \(at\) adriaticseaforum.com](mailto:agenda(at)adriaticseaforum.com)**
- **Inform and update us about the development of the single initiatives so we can spread the voice using Adriatic Sea Forum channels, with particular attention to those included in the agenda but also to other common goals which are relevant for the region or more than one sector.**

# CRUISE

## The current situation in the Adriatic

Entities and operators working in the Adriatic have a high level of diversity, from those who experience an annual growth by 25% to those who face the relationship with local citizens on a daily basis.

Common grounds have been found in the importance of the **port agent** in solving problems (e.g. the berthing process for those operating in neighbouring ports, which is a less recurring issue in international ports) and the need to identify actions so as to increase the tourism economic impact in the city hosting the port ("**givebacktothecity**").

## Some critical issues to be considered

- **Weekly concentration** of tourist flows;
- **Joint specialisation** on some cruise industry segments.

## Possible common initiatives

- **Zero waste in the Adriatic:** land cruise waste management in order develop fruitful recycling processes;
- **The Adriatic brand:** joint actions in targeted promotion of the Adriatic cruise industry (addressed to final customers, cruise lines and other operators);
- **The Adriatic Berths Platform:** a platform that could help cruise lines in quickly checking the availability of moorings in Adriatic ports in order to better create cruise itineraries, thus avoiding ports overcrowding and its consequent issues;
- **"Discover the Adriatic" database:** developing a database (that could possibly become a platform) listing shore excursions made available to cruise lines to offer new suggestions to discover and strengthen tourism options in the Adriatic;
- **Venice calls the Adriatic ports:** an international support to solve Venice and the cruise industry issue, which has consequences also on other Adriatic ports and their economies and needs a direct active commitment from all stakeholders concerned.

# FERRY

## The current situation in the Adriatic

The involved stakeholders stated that few ports organise activities to promote their city centers in order to attract ferry tourists in the destination and provide passengers with effective connections between the ferry port and the city.

Transportation by ferry is a mature market that was activated with another purpose but then hasn't kept the pace in terms of services. Rebranding should focus on the concept of the evolution from passenger to customer. This can be achieved through the organization of a more fluid system in the flow management and education of all operators in tourism.

## Some critical issues to be considered

- **Competition among ferry, cruise and aviation sectors** is immense, even from different points of view: perceptions of tourists, incentives, benefits, regulations;
- **Underestimation of the ferry industry** by public bodies both from a social point of view and environmental;
- Improve the services in order to establish **ferry as more than just a means of transport**;
- **LNG issue**: the European directive has stimulated Italy to "innovate" and an attempt has been made to create a global initiative both to avoid competitiveness between ports and to create a shared system. However, there is the lack of adequate infrastructures (not only in the Adriatic but also in the entire Mediterranean) and an updated punctual and standardized legislation (e.g. security, supplies, and so on).

## Possible common initiatives

- **Improve the perception of the ferry** as a means of transport through communication plans and adequate marketing, highlighting the profit for both the local territory and community.
- **Coordinate a lobby action** to promote either a mutual regulatory framework on the topic of refueling with LNG or the incentive mechanisms of the ferry sector.
- **Improve services to make ferries an attractive means of transportation** and also the travel experience when it comes to not only services on board, but also on the land side, like port infrastructures (maritime stations), roads and paths that passengers need to follow in order to board.
- **Develop the professionalism of the port operators** involved (dockside staff, check-in staff) by changing the conception of the passenger – now he has become a client who requires a series of services.

# SAIL & YACHT

## The current situation in the Adriatic

Operators identified the **lack of homogeneous regulation** among territories **and supranational coordination**, in particular in the VAT reductions and tax issues. This situation has been leading the boating industry demand to other countries that offer economic advantages, thus losing customers and the consequent tourist impact.

## Some critical issues to be considered

- The **offer in the destination** must guarantee many frequent flight connections, shopping opportunities for a luxury market, the urbanistic quality of the city (e.g. restaurants, hotels), low VAT on charter contracts, more refit and repair opportunities;
- **Taxation and regulations are unpredictable** both inside and among Adriatic countries, creating uncertainty for either current or future owners and charter companies;
- **Ecology and environmental issue**: reaching a compromise between superyacht accesses and the respect for the environment by keeping the pace with the evolution of maritime EU directives;
- Countries must give **rules** to be applied by local communities;
- More **funds** for projects that enhance the sector.

## Possible common initiatives

- **Do it together**: governments, regions and counties must reach common aims, have common standards and guarantee high quality, by constantly keeping in touch and exchange information.
- **Suggest regulations** both in the tax issue and environmental protection. Adriatic countries must put pressure on the EU Commission and propose solutions to boost the sector. Submitting new ideas could lead to getting necessary funds from the EU and finding best practices and common grounds. As for the VAT issue, there is the need to create a lobby in order to be part of those sectors that have better rates.
- **Work together for a joint communication and promotion**: promote the Adriatic as a green and clean sea in boat shows (es. Fort Lauderdale, MYBA Yacht Show). It is necessary to create awareness and use possible EU funds in full and joint promotion (also on the Internet), which can be an asset that allows to make more contained investments. Potential customers should understand that the Adriatic Sea is an interesting destination from the cultural, historical and naturalistic point of view.
- **Find solutions in order to attract new customers** and therefore redirect boats to the Adriatic instead of Greece and Turkey that are now offering better conditions (like economic advantages, low tax, VAT reductions).