



FORUM

delle Camere di Commercio dell'Adriatico e dello Ionico
of the Adriatic and Ionian Chambers of Commerce
Gospodarskih Komora Jadransko-jonskog područja

**What do local businesses
expect from the cruise
industry.**

**The experience of the AIC
Forum.**

Olympia, 23th May 2015

Mr. Andrea Mosconi
Business Manager
Ancona Chamber of Commerce



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WHAT IS THE FORUM OF THE ADRIATIC AND IONIAN CHAMBERS OF COMMERCE?



Trans-national non-profit Association
with Italian legal entity of 45
Chambers of Commerce and
Economy of the Adriatic and Ionian
Area established in 2001 by the
Ancona Chamber of Commerce and
the Split Chamber of Economy.

It represents about 1.800 000 SME's
with € 26,7 billion trade exchange



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GOALS

The Forum AIC aims at:

- Promoting the economic development of the Adriatic-Ionian area
- Reinforcing relations among the Chambers of cross-border countries
- Facilitating legal and administrative cooperation through harmonised procedures among the countries
- Contributing to EU integration.
- creating conditions and working tools for the growth of the Adriatic and Ionian Macroregion
- reinforcing partners' capacities to ensure the application of the EU proximity policy principles
- allowing to its members better possibilities of access to various funds
- creating joint initiatives for development of economic and commercial relations among its members also with the involvement of other stakeholders active in the Adriatic and Ionian area.



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TOURISM WORKGROUP

It's one of the 6 AIC Forum workgroups.

Its principal aims are:

- The analysis of tourism market trends;
- **The creation of a tourist identity for the Adriatic-Ionian macro-region;**
- The promotion of a network of services organized according to shared criteria and quality standards;
- The exploitation of particular resources of each single territory and of unifying factors as well;
- The extension of the tourist season - Preservation of natural and cultural heritage.



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ADRION
Adriatic and Ionian Lands

ADRION INITIATIVE

ADRION initiative was launched in 2008 by AIC Forum within the thematic workgroup on Tourism in order to develop new sustainable tourism products and services and to boost their quality and value.

- The **Vision** of the ADRION initiative is that new tourism products should enhance local identity, respect for human rights, include accessible tourism and protect natural and cultural heritage.
- The **Mission** is the enhancing of a new sustainable and responsible tourism management based on innovation and quality.



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ADRION INITIATIVE

Three main activities referred to ADRION have been planned and developed thanks to a cross-border cooperation among different partners:

1. Adrion as an umbrella trademark of the Area
2. Training courses and technical workshop
3. Developing innovative, quality tourism products and services

Most of the actions carried out within these activities have been possible thanks to the AIC Forum funds and grants from European Union, National and Regional Organizations.



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ADRION TRADEMARK

- Registered and owned by the AIC Forum since 2008
- Aims at helping the tourist operators of the Adriatic and Ionian area to have more strength when they offer their destinations on international market
- A tool for an integrated and joint tourist (but not only) promotion of the Area
- **Officially recognised as a reference “*best practice*”** in the European Commission Communication n.713 of 30th November 2012 in the Maritime Strategy for the Adriatic and Ionian Seas and in the Action plan of the Adriatic and Ionian Macroregion published on the last 17th of June
- Regulations of use of the Adrion has been drawn up and recently amended by fully corresponding to the Adriatic Ionian Macroregion priorities.



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INNOVATIVE PRODUCTS & SERVICES

Best practices

The promo-commercialization is based on common themes and two of the best practices developed within ADRION are:

- **The TECH-TOUR Project** - TOUR Technology and tourism: augmented reality for the promotion of **the Roman and Byzantine itineraries**. (DG Enterprises and Industry Ref. Trans-national Cooperation Projects on European Cultural Routes)
- **The project VeroTour - Venetian routes**: enhancing a shared European multi-cultural sustainable tourism (DG Enterprises and Industry Ref. Support to transnational thematic tourism products as means of enhancing competitiveness and sustainability of European tourism)



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TOURISM IN THE AREA

Maritime tourism in the Adriatic and Ionian Seas in 2014 at glance

The Adriatic Sea experienced intense activity in all maritime tourism dimensions...

...BUT

International economic crisis and strong low cost companies competition are changing the competitive background for small and medium ports.

More than 20 cruise ports
4,6 million passenger movements

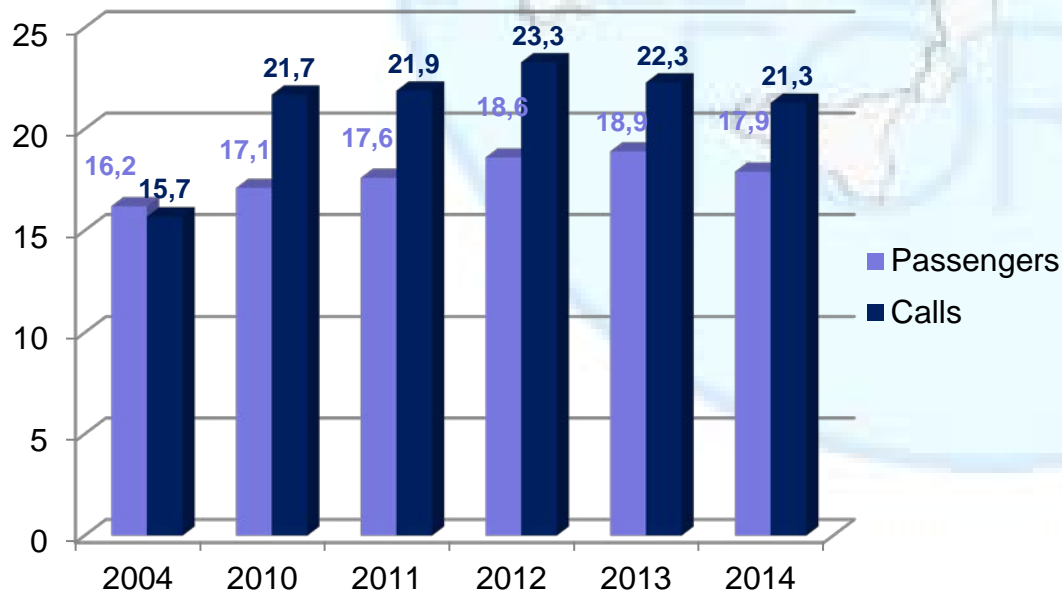
More than 40 ferry ports
About 17 million passenger movements

More than 300 structures for boat tourism
About 80,000 moorings

TOURISM IN THE AREA

Cruising is one of the many way to discover tourism destinations but also a phenomenon that showed the highest growth curve in the past decades.

Adriatic cruise passenger movements and cruise calls share of the Mediterranean 2004 and 2010-2014



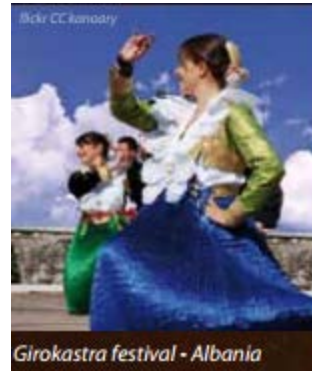
TOURISM IN THE AREA

The cruise sector alone is showing a strong potential for growth.

However

to locally capture the economic benefits and **mitigate the possible negative effects of short and massive tourist arrivals**, cruise sector should be better integrated in the tourist offer of the Adriatic-Ionian territories.

The full potential of the Region's rich **natural, cultural, historic and archaeological heritage** is not yet exploited in a **sustainable and responsible way**. This should build on climatic as well as on existing market advantages.





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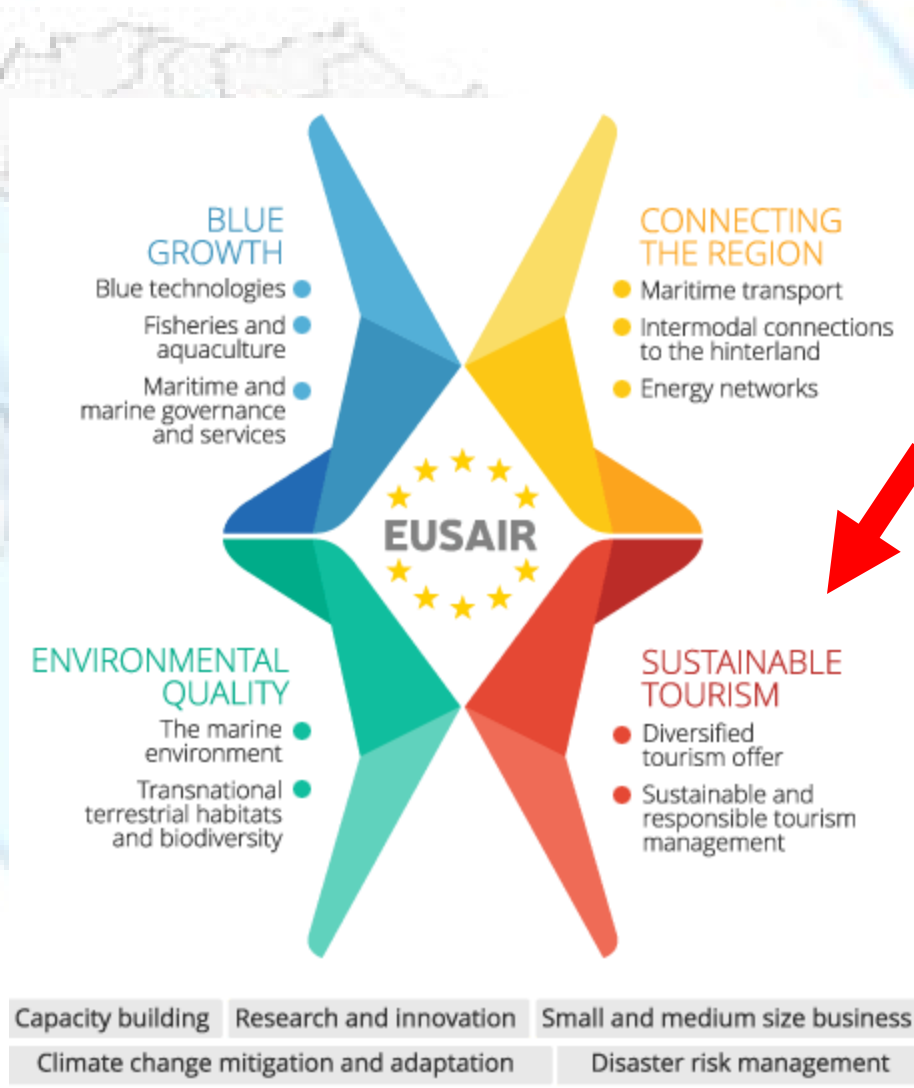


EU Strategy for the
Adriatic and Ionian Region
EUSAIR

EUSAIR STRATEGY

The European Union is paying particular attention to this area.

The Sustainable Tourism represents the **4th Pillar** of the new **European Strategy for the Adriatic and Ionian Region** whose Communication and Action Plan were officially endorsed by the European Council on November 2014.



New web site: <http://www.adriatic-ionian.eu/>



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EUSAIR STRATEGY



4th Pillar “Sustainable Tourism”

This pillar focuses on:

- developing the sustainable and responsible tourism potential of the Adriatic-Ionian Region
- promoting responsible tourism behaviour on the part of all stakeholders
- facilitating the socio-economic perspectives, removing bureaucratic obstacles, enhancing business opportunities

To achieve the above mentioned objectives the pillar will focus on two topics:

- Topic 1 - Diversified tourism offer (products and services);**
- Topic 2 - Sustainable and responsible tourism management (innovation and quality).**



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EU Strategy for the
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EUSAIR

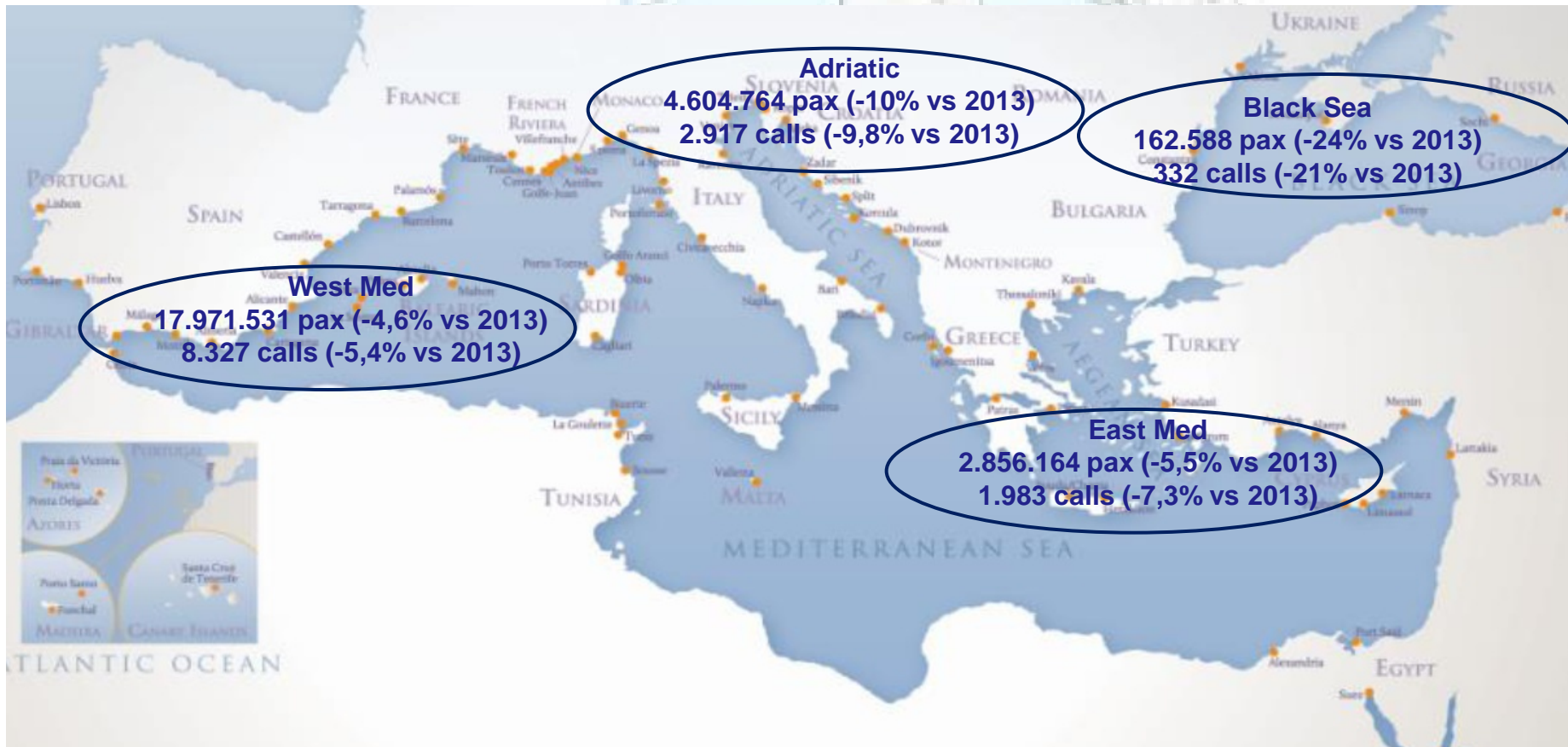
EUSAIR STRATEGY

4th Pillar “Sustainable Tourism”

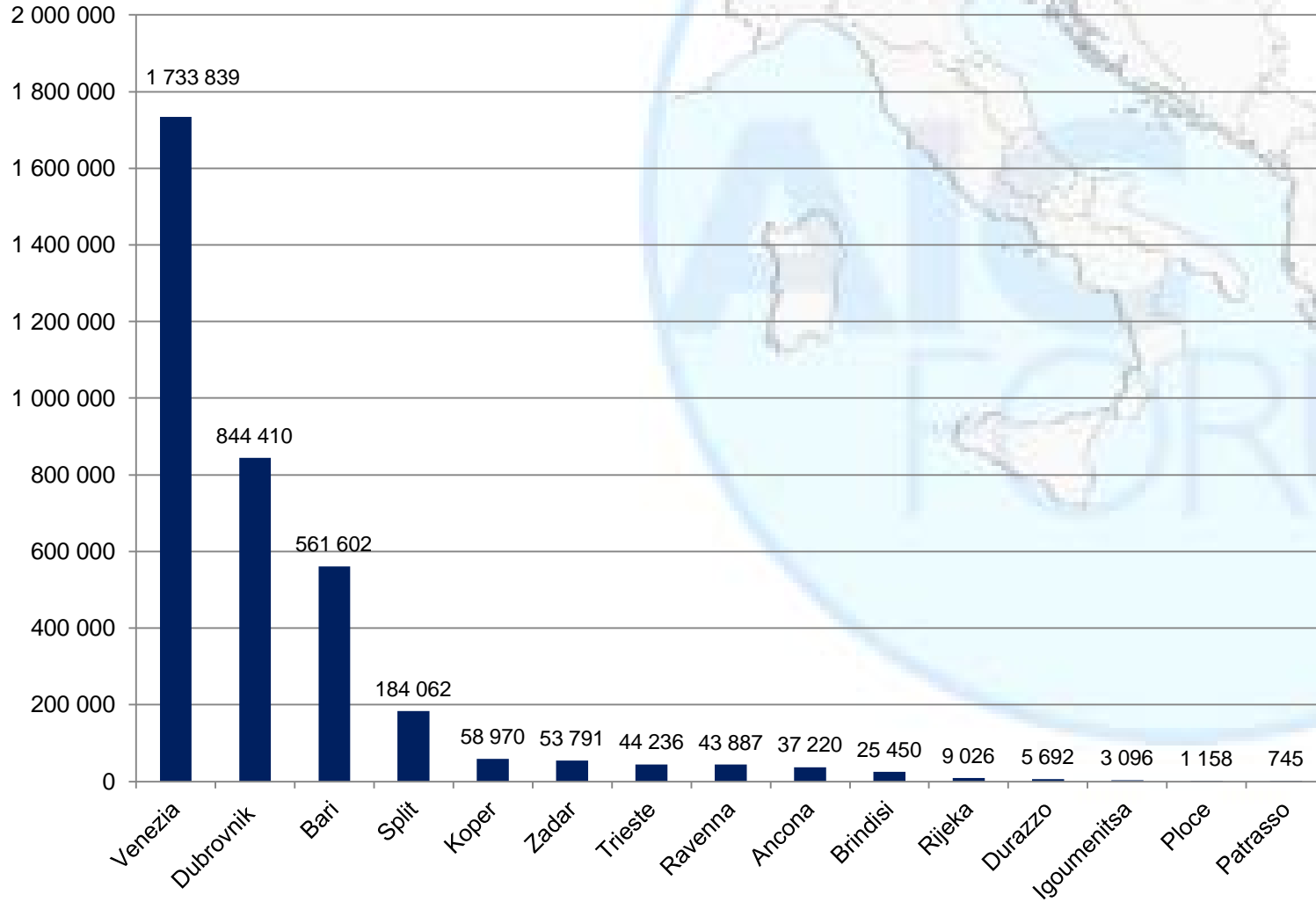
“Sustainability in tourism should be strongly linked to commercial and business perspectives. In this regard, the Forum of the Adriatic and Ionian Chambers of Commerce (AIC Forum) is linking the chambers of commerce of most of countries participating in this Strategy [...]” (pg. 52 of the Action Plan)

The AIC Forum, as one of the major stakeholder for the EUSAIR consultation phase, also has been recognised as one of the key actor for the implementation of the Strategy with particular reference to the 4th Pillar.

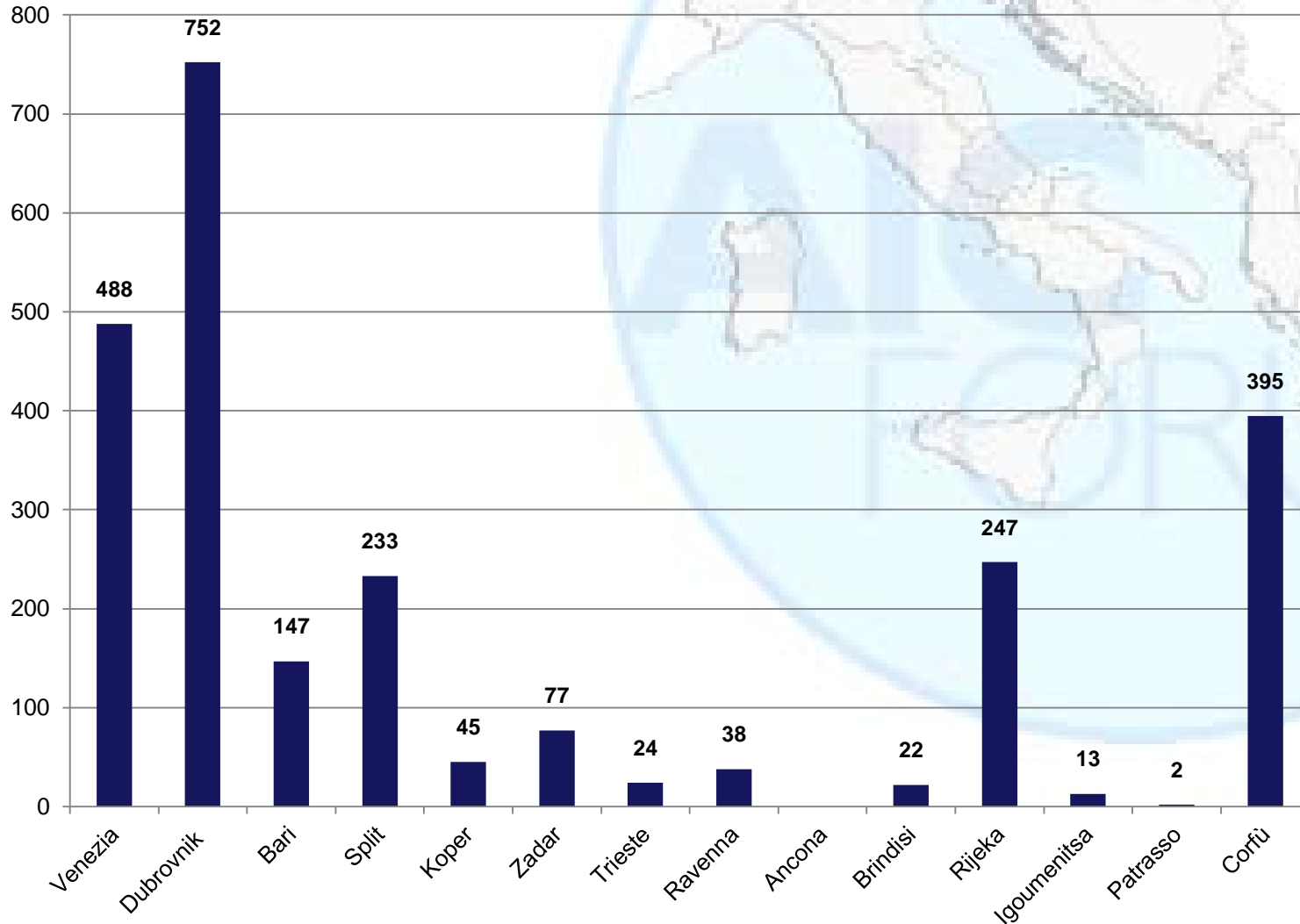
CRUISE PASSENGERS AND CALLS IN THE MEDITERRANEAN SEA



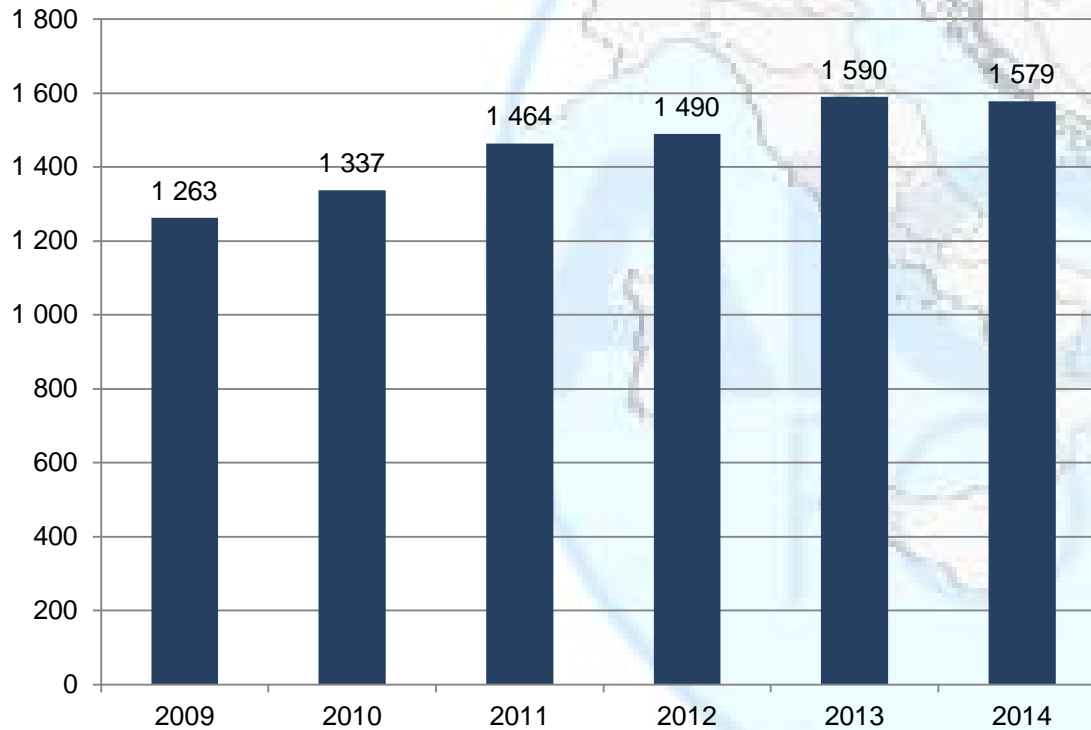
CRUISE PASSENGER IN ADRIATIC AND IONIAN PORTS (2014)



CRUISE CALLS IN ADRIATIC AND IONIAN PORTS (2014)



PAX/CALLS IN THE ADRIATIC AND IONIAN PORTS (2014)



	2009	2010	2011	2012	2013	2014	Var 2014/2009
West Med	1.921	2.051	2.242	2.177	2.138	2.158	12%
Adriatic	1.263	1.337	1.464	1.490	1.590	1.579	25%
East Med	1.101	1.147	1.242	1.326	1.440	1.440	31%
Black Sea	555	487	428	584	510	490	-12%



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THE ECONOMIC IMPACT OF THE CRUISE SECTOR

The CLIA “Cruise industry” report says that in 2013 the cruise industry generated expenditures of 16,2 billion €; 3,8 billion € of them (23,4%) are due to the cruise and crew spending.

Ports are different potential place of spending, it depends if they are home in/out or transit ports, which is their touristic and historical appeal and the welcome organization on land.

Venice and Barcelona, for example, can't be considered a benchmarking for most of the cruise ports, especially those of the Adriatic and Ionian basin.



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THE ECONOMIC IMPACT OF THE CRUISE SECTOR. TWO EXAMPLES: ANCONA AND SAVONA



A study of the University of Turin about the medium expenditure of cruise tourists in a transit port.



According to the reports, a cruise tourist spends about **26 €** in Ancona and **37 €** in Savona. Other studies (in other cities) give different results. Not all the tourist can be included in this evaluation, some of them buy guided tour directly from cruise companies and others don't disembark. THEN, the global expenditure from cruisers can be calculate only with a large approximation.



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THE ECONOMIC IMPACT OF THE CRUISE SECTOR. TWO EXAMPLES: ANCONA AND SAVONA

- Cruises can influence indirectly the economy and quality of life of cities where they dock. The cases of Ancona and Savona can be still useful. The two cities don't have a strong and consolidate capacity to attract tourists and their ports have been for a long time used for commercial purposes (goods and short sea shipping).
- Cruisers' arrivals are an opportunity to study a new setting for tourist ports: project for waterfront, welcoming activities, new accommodation structures and bar and restaurants, stronger focus on the quality of shopping in area surrounding the ports.
- Cruises can create tourist economic network also where there are a prior touristic tradition and generate growth and new jobs.



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THE ECONOMIC IMPACT OF THE CRUISE SECTOR. TRENDS AND RISKS

- Cruise companies prefer bigger ships (270 meters), increasing the number of passenger for each call.
- This trend could be a problem for those ports that should invest in new infrastructures to maintain their attractiveness for this market.
- There are also problems with the main cruise port of the Adriatic and Ionian area, Venice. Debate about the opportunity to pass (or not) through the old city with cruise ships. Venice Municipality's decisions could affect cruise results for a lot of Adriatic minor ports.



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WRAP UP

- 1) AIC Forum launched the ADRION initiative to develop a common touristic brand for the Adriatic and Ionians countries. New opportunities in this sense could come from the Adriatic and Ionian Macroregion strategy.
- 2) Various methods to calculate economic impact of cruise traffic on local economies; it depends on the kind of port and on the attractiveness of the city. But there are effects also for minor ports, especially for their waterfront and for the touristic activities in the surrounding area.
- 3) Imminent threats from the bigger dimension of cruise ship and fro their effects on infrastructure needs; role of Venice for the Adriatic and Ionian basin.