

D.3.3.1 Updated passenger flow analysis

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Introduction

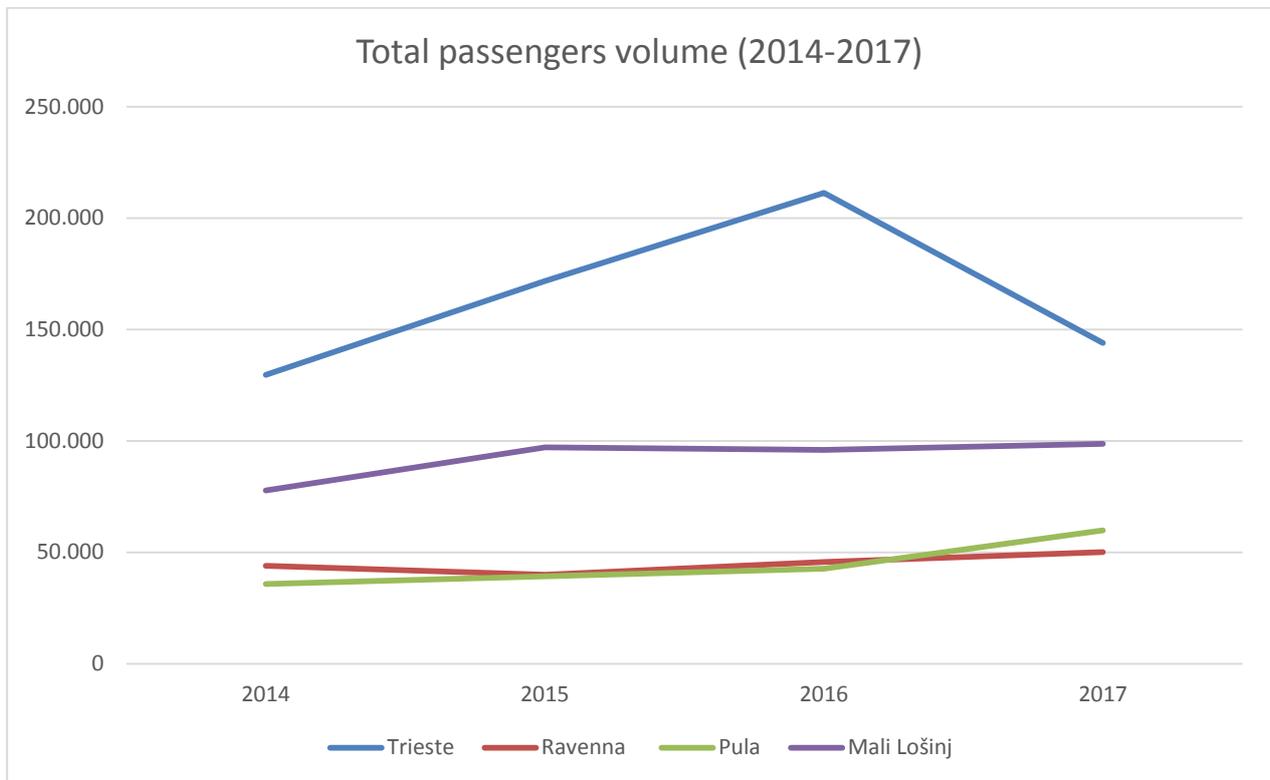
The report “D.3.3.1 Updated passenger flow analysis” synthetize the main data related to touristic passengers flows collected in the period 2014-2017 by the Moses partners in their main port hubs. These data refers to Trieste and Ravenna for Italy (data on Molise Region Termoli port were not provided) and Pula and Mali Lošinj for Croatia.

This touristic flows analysis activity is related to the Moses WP3 “Setting up the framework for successful pilot activities”. The WP3 main objective is to setting up the knowledge framework at CBC level in order to better understand the contexts on which the different Moses pilot actions are working on. In particular the activity 3.3 “Wrapping up past results and update people and tools” is related to the updating of the CBC passenger flow analysis carried out during the EA SEA-WAY project in 2015.

In this report there is a synthesis of the main comparable data related to passengers flows in the port hubs involved in the Moses Italy-Croatia project. All the others detailed data are in the Excel files related to the present report.

1. Total passengers flows in the Moses ports (2014-2017)

In this paragraph there is a summary of the total passengers flows monitored in the Moses port hubs in the period 2004-2017.

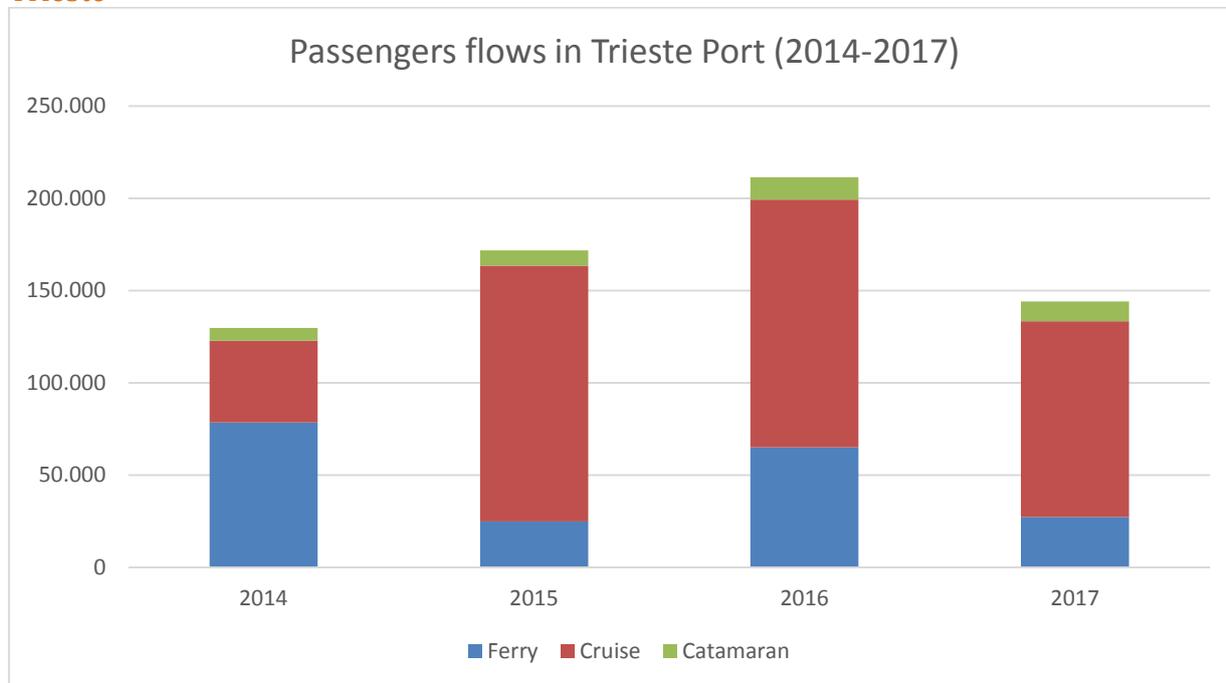


Total passengers volume (2014-2017)				
	2014	2015	2016	2017
Trieste	129.691	171.813	211.375	144.028
Ravenna	43.887	39.982	45.617	50.133
Pula	35.755	39.133	42.650	59.794
Mali Lošinj	77.772	97.150	95.961	98.686

FIGURE 1. TOTAL PASSENGERS VOLUME IN 4 MOSES PORT AREAS (2014-2017)

1.1 Details on Moses ports passengers flows per typology of maritime access

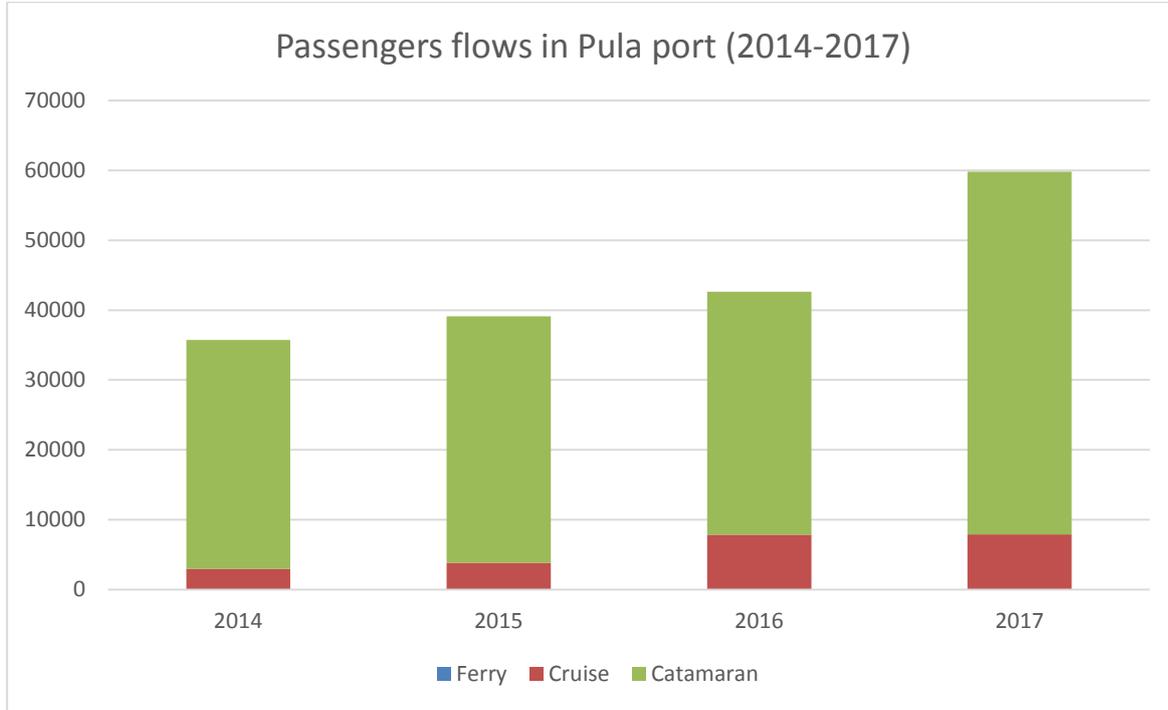
Trieste



Passenger traffic in Trieste Port				
	2014	2015	2016	2017
Ferry	78.549	24.820	64.971	27.311
Cruise	44.236	138.635	134.401	106.018
Catamaran	6.906	8.358	12.003	10.699

FIGURE 2. PASSENGERS TRAFFIC IN TRIESTE PORT PER MARITIME MODES

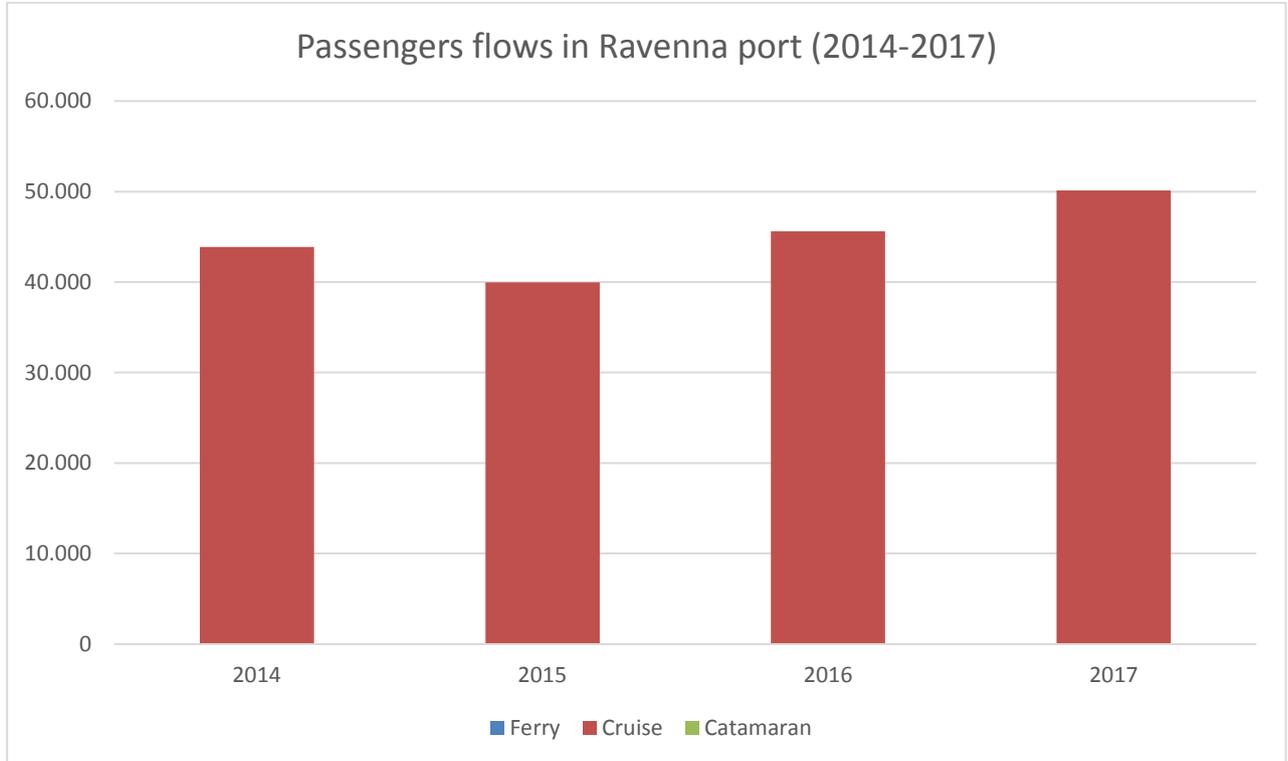
Pula



Passengers traffic in Pula port				
	2014	2015	2016	2017
Ferry	0	0	0	0
Cruise	2.950	3.860	7.854	7.904
Catamaran	32.805	35.273	34.796	51.890

FIGURE 3. PASSENGERS TRAFFIC IN PULA PORT PER MARITIME MODES

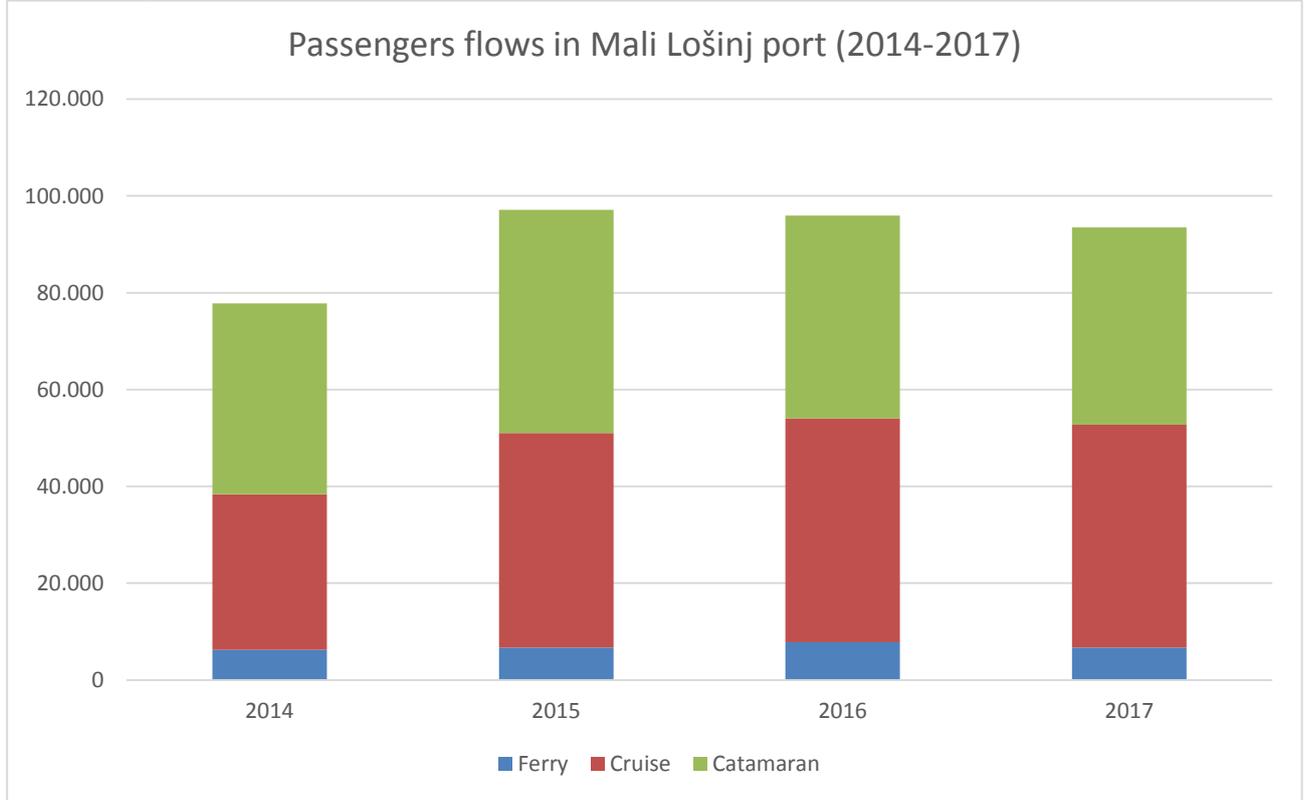
Ravenna



Passengers traffic in Ravenna port				
	2014	2015	2016	2017
Ferry	0	0	0	0
Cruise	43.887	39.982	45.617	50.133
Catamaran	0	0	0	0

FIGURE 4. PASSENGERS TRAFFIC IN RAVENNA PORT PER MARITIME MODES

Mali Lošinj



Passengers traffic in Mali Lošinj port				
	2014	2015	2016	2017
Ferry	6.230	6.676	7.848	6.720
Cruise	32.104	44.338	46.234	46.016
Catamaran	39.438	46.136	41.879	40.779

FIGURE 5. PASSENGERS TRAFFIC IN MALI LOŠINJ PORT PER MARITIME MODES

2. Swot Analysis

The SWOT analysis allow to identify the strengths, weaknesses, opportunities, and threats related to a project planning. Defined the objectives of a project, the SWOT methodology allow to identify the internal and external factors that are favourable and/or unfavourable to achieving those objectives. The SWOT analysis analyse four different parameters:

- **Strengths:** characteristics of the project that give it an advantage;
- **Weaknesses:** characteristics of the project that place the project at a disadvantage;
- **Opportunities:** elements in the environment that the project could exploit to its advantage;
- **Threats:** elements in the environment that could cause trouble for the business or project.

In the following paragraphs the Swot analysis related to the Moses pilot areas of intervention.

Ravenna Cruise Terminal SWOT analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> - Ravenna is a very known UNESCO World Heritage city. The Ravenna city is very attractive among Italian and foreigners tourists - The cruise terminal in Ravenna is very close to the most important beaches and natural areas of the Ravenna province. This allows to work on offering to tourists an high quality 	<ul style="list-style-type: none"> - The cruise passengers terminal is far from the city centre (12 km) - The bike and public transport connections among the Cruise terminal and the city centre are poor - Underdeveloped/old port infrastructure and supra structure

<p>touristic offer;</p> <ul style="list-style-type: none"> - Good road connections - The municipality is working on improving the main port transport infrastructures, included the cycle paths; - High quality management system of the port services and area. 	
<p>Opportunities</p> <ul style="list-style-type: none"> - New bike lines connecting the Ravenna cruise terminal with the most important artistic and natural attractions are under development by the municipality and others EU projects like Interreg Med project LOCATIONS; - The Ravenna Port Authority during the 2018 invested significant economic resources to solve the problem of silted sea beds that hinder the possibility of big ships to attract in the Ravenna cruise port; - Good development of municipality and town centers; - Big tourist potential. 	<p>Threats</p> <ul style="list-style-type: none"> - During the 2018, problems with sand blocking the access to the cruise terminal to the biggest ships had reduced the number of tourists arriving in Ravenna respect the previous years; - Strong winds, mainly during the autumn season, and the peculiar port infrastructures (long access piers) may generate problems for docking; - Frequent law changes; - Insufficient local, regional and national sources of financing projects

Port of Trieste CBC maritime passengers public transport services SWOT analysis

<p>Strengths</p> <ul style="list-style-type: none"> - Availability of regional funds to keep fast maritime public transport cross-border 	<p>Weaknesses</p> <ul style="list-style-type: none"> - Lack of co-financing of maritime cross border services by Croatian institutions;
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<p>services available;</p> <ul style="list-style-type: none"> - Legal framework defined and approved by EU Commission in compliance with State aid rules for cross-border maritime services; 	
<p>Opportunities</p> <ul style="list-style-type: none"> - The new selected regional public transport operator is expected to set up from 2020 a wider range of maritime public transport services at regional level, which might be complimentary to the existing cross-border maritime lines, increasing the attractiveness of both the services. 	<p>Threats</p> <ul style="list-style-type: none"> - The lack of direct, safe and easy connections to the other transport terminals (railway station, interurban bus station), although located very closed to the piers dedecated to passengers transport (less then 400 mt) is bound to make more difficult the increase of the choice of intermodal solutions by potential passengers.

Port of Pula SWOT analysis

<p>Strengths</p> <ul style="list-style-type: none"> - Good geostrategic position - Increasing demand for cruising in Mediterranean and Adriatic sea - The City of Pula is an important tourist destination 	<p>Weaknesses</p> <ul style="list-style-type: none"> - Limited financial resources - Inadequate port infrastructures - Lack of terminal buildings - Insufficient depth at mooring
<p>Opportunities</p> <ul style="list-style-type: none"> - Creation of new tourist services - Passenger port development - Construction and renovation of the existing port infrastructures 	<p>Threats</p> <ul style="list-style-type: none"> - Loosing passenger traffic to competing ports in the North Adriatic

Port of Mali Lošinj SWOT analysis

<p>Strengths</p> <ul style="list-style-type: none"> - Attractiveness of port and island for passengers from Italy and in general from EU; 	<p>Weaknesses</p> <ul style="list-style-type: none"> - The possibility of coming to Mali Lošinj with a catamaran from Rijeka for a price of 8 EUR per person in one direction and therefore the smaller competitiveness of Trieste - Mali Lošinj line compared to the "parallel" line subsidized by the Republic of Croatia in the context of better connecting the islands with the mainland and benefiting for the islanders.
<p>Opportunities</p> <ul style="list-style-type: none"> - In the future, there is the possibility of increasing the number of passengers as they become more aware of the existence of the line and the possibility for coming to Mali Lošinj without the use of road traffic and the adequate application of the multimodality of the traffic branches planned in the future 	<p>Threats</p> <ul style="list-style-type: none"> - Lack of maritime carriers' interest due to the small number of passengers (for now) and their poor response to published tenders for the line

Conclusions

The touristic flows in the 4 Moses port hubs analyzed show as the future challenges for increasing the attractiveness and the receptiveness are challenging. The Moses project contribute in analyze more in deep these challenges and provide thanks to its different pilots and activities some evidences on how to face these touristic and transport challenges crucial for a sustainable and strong growth of the Italy-Croatia area.