



FORUM

delle Camere di Commercio dell'Adriatico e dello Ionio
of the Chambers of Commerce of the Adriatic and Ionian Area

ADRION PROJECT MASTER PLAN Integrated tourism in the Adriatic Ionian area

Ida Simonella, 24th April 2008

project co-funded by



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1 THE PROJECT: AIMS AND PROMOTERS

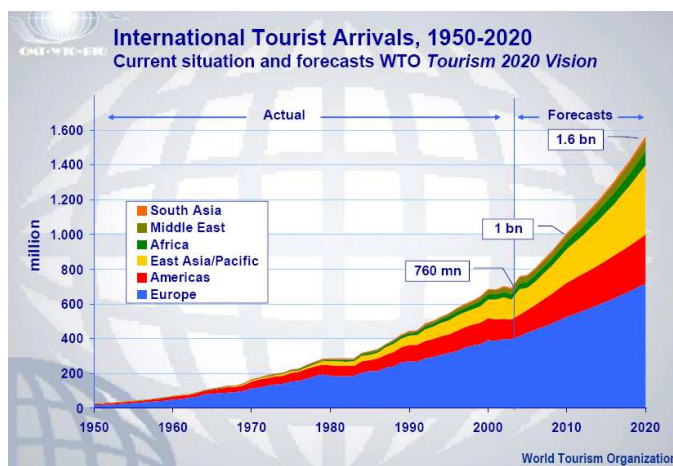
The Forum of the Chambers of Commerce of the Adriatic and Ionian Area, is a non-profit voluntary transnational association that groups together 36 Chambers of Commerce from 8 different countries: Italy, Croatia, Slovenia, Albania, Montenegro, Bosnia and Herzegovina, and Greece.

For some years now, the Workgroup for Tourism has been working on developing a **unitary tourism system** that involves countries of the area. The basic idea comes from the fact that the current tourist offers, still anchored to an individual country of reference, with the exception of Venice, Croatia and Greece, experience great difficulty in becoming established on an international level. In some cases this is due to the maturity reached by the tourism product (such as in the Italian Adriatic sea), and in others because we are dealing with territories with as yet little known tourism potential (Montenegro, Albania, Bosnia Herzegovina).

This Master Plan illustrates the strategies and actions necessary to developing a form of integrated tourism, supported by a summary of the analyses that have been carried out at various stages.

2 THE INTERNATIONAL TOURIST SCENE AND THE TERRITORIES OF THE ADRIATIC AND IONIAN AREA

The World Tourism Organisation states that the international tourism market will continue to grow at a sustained rate until 2020. The current 800 million international tourists will become 1.6 billion by 2020.



The main world tourist destination will continue to be Europe, but its market share will drop from the current 55% to a total of 45%. The areas of greatest growth will be the Far East and the Asian Pacific, where China and India will dominate.

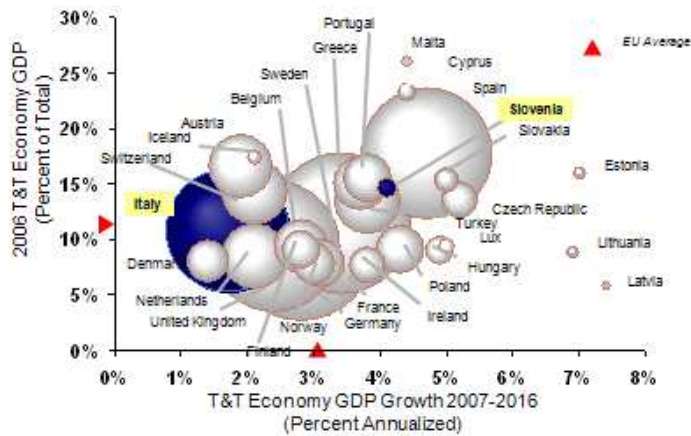
In this scenario, some of the more specific analyses carried out by the *World Tourism and Trade Council* in 2006 are of particular interest. They illustrate the positioning of various

different tourist destinations in relation to two variables: current importance of the tourist economy on the total of the GDP, and development rates of the tourist economies estimated for the ten-year period 2007-2016. Italy as a whole (i.e. not just the Adriatic regions), of all the countries of the basin, represents the most important tourist economy, and is basically in line with the EU in terms of the share of GDP that can be attributed to this field, yet the forecast development rates are much more cautious than European averages. Slovenia and Greece, on the other hand, are tourist economies with development rates that are higher than the average by approximately 1-2 percentage points. It is, however, the non-EU countries belonging to the

area for which extremely high development rates are forecast. Croatia first and foremost, whose weight on the tourist sector on the national GDP is almost double that of the European average, and will grow over the next few years, with average development rates of 8-9%.



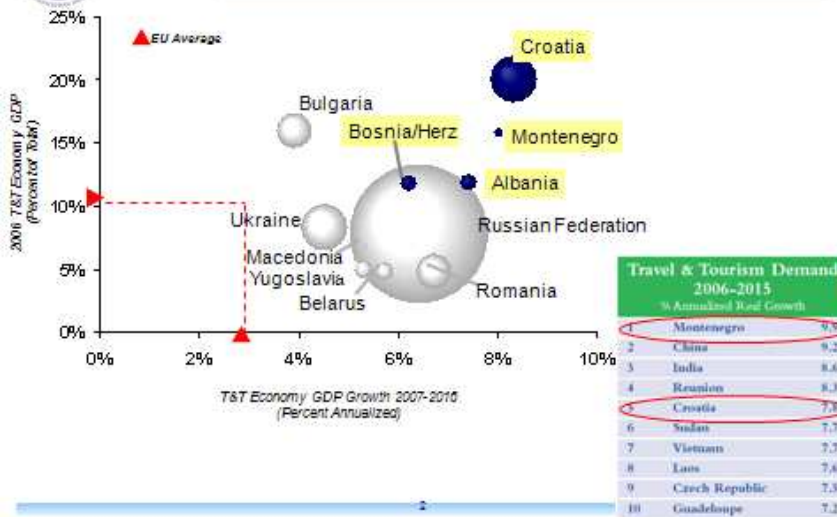
Forecast 10-year period: development rates of UE tourist economies



Source: World Tourism and Travel Council, 2006



Forecast 10-year period: development rates of East Europe tourist economies



High growth rates, although on generally very limited volumes, are also forecast for Bosnia Herzegovina and Albania.

Montenegro, on the other hand, is rather unique, as its economic growth connected to tourism is forecast as around 10% annually according to all the most major international research institutes on tourism.

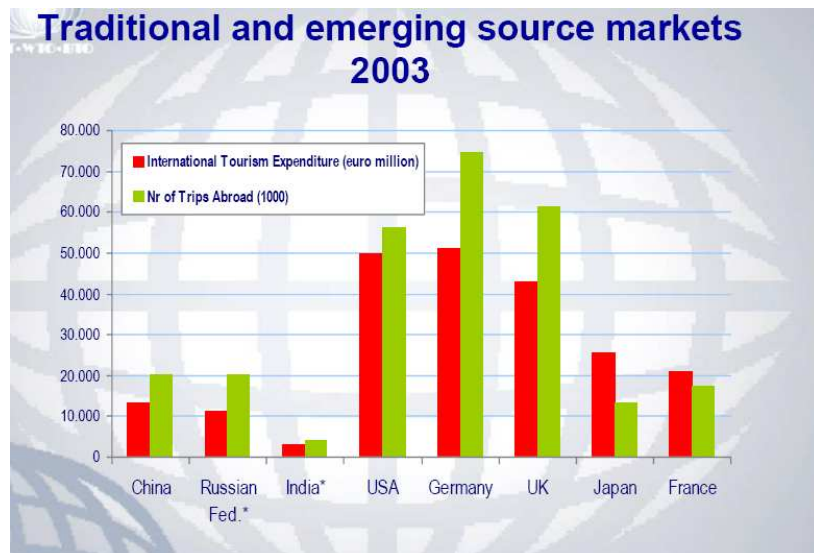
The emergence of new tourist economies on the international scene is confirmed in the altered international scene with regards to the distribution of flows amongst the main tourist destinations worldwide.



		MAIN TOURIST DESTINATIONS WORLDWIDE							
		1950	Share	1975	Share	1990	Share	2004	Share
1	USA	Italy		France		France		France	
2	Canada	Canada		USA		Spain		Spain	
3	Italy	France	43%	Spain	38%	USA	33%	USA	
4	France	Spain		Italy		Italy		China	
5	Switzerland	USA		Hungary		Hungary		Italy	
6	Ireland	Austria		Austria		United Kingdom		United Kingdom	
7	Austria	Germany		United Kingdom		Hong Kong		Hong Kong	
8	Spain	Switzerland	22%	Mexico	19%	Mexico	14%	Mexico	14%
9	Germany	Ex-Yugoslavia		Germany		Germany		Germany	
10	United Kingdom	United Kingdom		Canada		Canada		Austria	
11	Norway	Hungary		Switzerland		Canada		Canada	
12	Argentina	Czechoslovakia		Greece		Hungary		Hungary	
13	Mexico	Belgium	10%	Portugal	10%	Turkey	11%	Turkey	11%
14	Netherlands	Bulgaria		Malaysia		Malaysia		Malaysia	
15	Danemark	Romania		Croatia		Poland		Poland	
		OTHERS	3%	OTHERS	25%	OTHERS	33%	OTHERS	42%
		25 millions		166 millions		456 millions		760 millions	

In 1950, the first 15 tourist destinations gathered 97% of international arrivals. This share has progressively diminished, and in 2004 was reported at 58%. International tourist preferences have changed, and together with the traditionally strong countries (such as Italy, France, the USA, and Spain), new tourist destinations have emerged, with China particularly standing out in recent years.

The international tourism market has basically grown over the years, bringing with it a strong differentiation in the markets of destination. The countries of origin of international tourists are also ever more varied. Western Europe, the United States, Canada and Japan remain the markets from which the largest shares of tourists depart. And yet, these are markets with enormous potential for further growth:



- In first place, ever more segments of the population are taking holidays. Furthermore, the annual frequency of holidays of each person has increased: a trip is ever more rarely an isolated episode;
- The change of the demographic structure of the population has a direct effect on the greater number of holidays: simply consider the share of the elderly population that has a lot of time and often sufficient resources to go on long trips, so much so that retirement tourism is taking an ever increasing share of the total market. It is an interesting segment, because it is a form of low and medium season tourism, generally speaking with a high interest in culture.
- Some 'exogenous' phenomena lead to ever more frequent travel: the most obvious case in Europe is the explosion of the low cost airlines that, in actual fact, guarantee easier access to tourist destinations.

The behaviour and consumption profiles of the tourist change significantly. Ever more often, he is independent - do it yourself - he tends to 'package' a made-to-measure holiday, has greater experience, looks for an active holiday, and is more willing to learn from other cultures. He is sensitive to social and environmental matters and strongly guided by technology.

THE MAIN TOURIST SEGMENTS IN 2020

1	Sun and Beach (long-distance travel, combined trips, specific segments)
2	Sports (winter sports, water sports)
3	Adventure
4	Nature tourism
5	Cultural tourism
6	City tourism
7	Rural tourism
8	Cruises
9	Theme parks
10	Meetings and conferences

Source: WTO 2006

The tourist is ever more the lead player in his own holiday. He requires an 'immersion' in his destination and pays greater attention to the cultural, natural and social aspects of his destination.

The greater attention to the environment leads to two different types of behaviour. The first is a general awareness of the environmental aspects of his holiday destination (according to an estimate by IUCN, almost 60% of tourists include 'environment' as a reason for choosing a specific destination). The second relates to the choice of specific products, 'eco-tourism' products. Eco-tourism is, in fact, one of the areas of tourism that is in greatest growth, and includes: excursions, agricultural tourism and volunteer work.

This evolution of the style of holidays leads us to forecast that over the next few years, there will be significant growth of those tourist areas that have great experience and are actively involved in the consumer side of the holiday. These include particularly the areas of sport, nature, adventure and wellbeing.

Alongside this evolution of the more mature market, we have ever more tourists coming from the so-called emerging countries: China, Russia, South Korea, India, but also the Middle East and Singapore, where ever more sections of the population have sufficient income to take at least one holiday a year.

According to the World Tourism Organisation, the political and institutional system will play an ever more key role in the factors that determine the future success of tourist areas, ever more in competition.

KEY FACTORS TO ENCOURAGE THE DEVELOPMENT OF TOURISM

- *1 The political and institutional system must support the tourism system*

- *2 Appropriate legal system*

- *3 Investments*

- *4 Development of transport*

- *5 Integration*

- *6 Promotion / marketing*

- *7 Quality*

- *8 Public-private partnership*

Source: WTO

The transversal nature of the tourist offer, which includes both primary attractions (nature, culture, etc...) and secondary factors such as the system of infrastructure accessibility, reception services, additional services, impose an active role of policy makers and institutional subjects that alone, should be able to coordinate all elements necessary to encourage tourist competition of the territories.

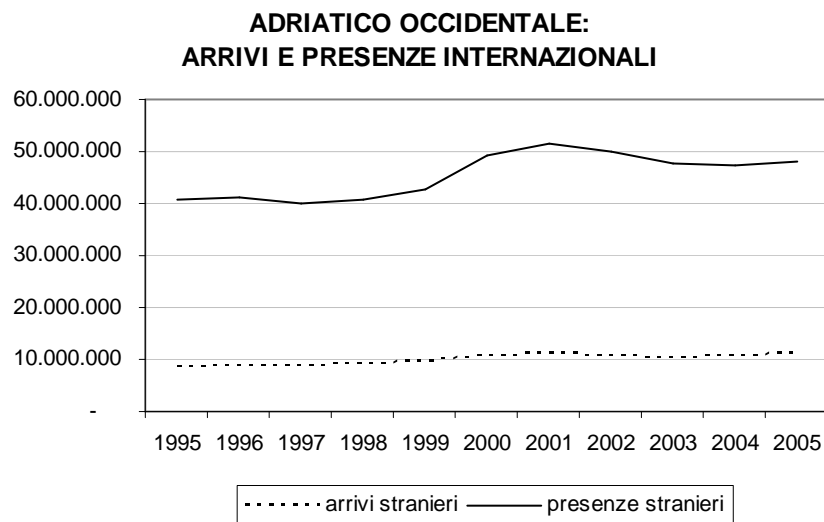
2.1 Tourist attraction capacity of the area

In 2005, the Adriatic Ionian Regions, or rather the Italian Adriatic Regions together with Slovenia, Croatia, Montenegro, Albania and Greece, already boasted 22 million international arrivals, to which approximately 15 million international arrivals to Greece can be added. If we were a single area of international tourism destination, we would be well placed as a top destination.

Unfortunately, the historic series of information often different for countries of the basin, does not allow us to take a homogenous in depth look at tourist data. Some general considerations can, however, be made.

On the western Adriatic, apart from a good performance recorded in 2006, the trend of international arrivals is more or less flat. The data recording presences also shows a loss of 3 million presences in the reception businesses from 2001 (51 million) to 2006 (48 million).

We should also stress that the overall dynamics of the area are greatly affected by the results of Veneto and Venice that alone account for almost 70% of arrivals and international presences in the western Adriatic.



Source: our processing of ISTAT data

In actual fact, within the area positive results have been reported for Veneto and Venice, and good performance in recent years for Apulia. The Marche has recently shown signs of recovery, and reported good growth in 2006. The five-year period 1996-2001 was very positive. The last 5 years, on the other hand, have been marked by significant development difficulties.

VARIATION RATES OF ARRIVALS AND PRESENCES IN THE FIVE-YEAR PERIODS 1996-2001 AND 2001-2006

	arrivals		Presences	
	Change 2001-1996	Change 2006-2001	Change 2001-1996	Change 2006-2001
VENETO	31%	10%	36%	2%
FRIULI-VG	8%	-6%	1%	-15%
EMILIA ROMAGNA	22%	1%	9%	-7%
MARCHE	19%	-3%	6%	2%
ABRUZZO	74%	4%	70%	-3%
MOLISE	53%	-12%	79%	-14%
APULIA	46%	41%	44%	10%
total	28%	0%	26%	-7%

Source: our processing of ISTAT data

In total, the eastern Adriatic attracts approximately 11.5 million international tourists, a figure that it is basically similar to that of the western Adriatic. More than 80% of international movements concern Croatia, followed by Slovenia (15%). Montenegro (3.5%), Bosnia Herzegovina and Albania represent approximately 5% of foreigners to reach the eastern area.

For Croatia and Slovenia, we can add that, differently from the Italian Adriatic regions, in recent years constant growth rates of arrivals and presences have been recorded (moreover that can be hypothesised also for the other countries that do not have any significant historical data).

Such data, apart from the initial data on Greece, does not include the flows of cruisers that we know are an extremely powerful segment on the eastern banks.

As both banks exploit the same international basins (Germany, Italy, Austria and France are the most important countries), it is clear that there is significant competition.

INTERNATIONAL ARRIVALS IN CROATIA AND SLOVENIA:

	2003	2004	2005	2006	2007
Croatia	7.408.593	7.911.874	8.466.886	8.658.876	9.306.691
% change		7%	7%	2%	7%
Slovenia	1.373.137	1.498.852	1.554.969	1.616.650	1.751.332
% change		9%	4%	4%	8%

3 THE INTEGRATED OFFER OF THE ADRIATIC AND IONIAN AREA

3.1 The current integrated offer of area on the international market

3.1.1 *The aims of the analysis and the methodology of investigation adopted.*

During the analyses carried out to define the intervention strategy of the initiative, an investigation into international tourist packages was carried out, that considered the Adriatic-Ionian area as a sole area of destination. In particular, those offers considering the presence in a single package of more than one tourist destination within the countries of the basin, i.e. Italy, Slovenia, Croatia, Montenegro, Bosnia Herzegovina, Albania and Greece, were analysed.

This type of investigation allows us to check if, and in what way, a single image of the area exists in the perception of the tour operator and customer.

The analysis was carried out on two different levels:

1. the first concerned **a wide ranging investigation into tourist packages promoted and/or operator offers** (mainly as tour operators) through websites, with the constraint of choosing those subjects that offered tourist attractions of more than one country of the area, at the same time. In practise, those operators and packages offering just one of the countries of reference were excluded: for example, individually, Italy, Croatia and Greece are included in the catalogues and offer of many operators, but much fewer offer these together with other countries of the basin.

With regards to the countries of origin of the packages and the operators analysed, priority was assigned to the consolidated tourism markets, and specifically: the USA and Canada, Italy, the United Kingdom, Germany, France, Holland, and Sweden.

These are also those countries from which most international tourists coming to the Adriatic, originate. We are also aware that the potential exists in new markets such as those of China, India, Russia and Korea, although all the more consolidated behaviours provide more significant signs as to the ways in which the tourism market of the Adriatic-Ionian basin can be approached.

We should also specify that this study is not intended to provide statistical information, the investigations carried out do not start from a defined universe from which a sample, stratified to a greater or lesser extent, has been extracted and is greatly representative.

The approach remains, instead, one of quality, in order to highlight the greatest evidence as to the perception of the Adriatic market by operators and international tourists.

2. In second place, we have attempted to better understand the profile of the tourist and the sensitivity/potential that the operators see in the Adriatic-Ionian basin, through a telephone questionnaire with tour operators who, in the field of the first level of investigations, were amongst the most interesting.

The results of these two levels are reported in brief over the following paragraphs.

3.1.2 *The results of the investigation into tour operators.*

As stated on more than one occasion, the investigation has privileged the choice of tourist offers that consider more than one country of the Adriatic-Ionian basin at the same time.

Here we should specify an all-Italian trait. In this field of investigation, Italy is represented by the regions of the Adriatic area, or rather Friuli Venezia Giulia, Veneto, Emilia Romagna, Umbria, Marche, Abruzzo, Molise and Apulia.

Generally speaking, with the exception of Venice (rather than Veneto) these are marginal regions in international tourist circuits. The destinations preferred by foreign tourists are 'classically Italian' ones, such as Rome, Florence, Naples and Venice, or other such places that have an extremely strong consolidated image abroad. This is the case of the Amalfi coast, the Cinque Terre in Liguria, the lakes and Alps, Tuscany, Sicily and, more recently, also Umbria. The other Italian regions are, in fact, outside the larger figures of the International circuit. There have been positive signs in recent years for Apulia, placing it within itineraries of southern Italy, or food-related tourism, but they remain fairly limited figures.

Despite this, on an International level, many operators offer the sea and regions of eastern Italy, but more generally, when speaking of the Adriatic, reference is made mainly to Croatia, the Dalmatian coast, and less to the other regions facing onto this sea.

Fundamentally, a tourist offer concerning the Adriatic in the broader sense (and not a single region or a single country) almost always includes Croatia, and sometimes other regions/countries too.

This is why, in order to better target research, we have attempted to understand which operators sold Croatia, evaluating then if around this, there was also a broader offer. In order to do such, we have referred to the National Office of Croatian Tourism that, in its portal (www.croatia.hr) states for the main international markets, the list of tour operators that offer Croatia as part of their packages. For each of these (approximately 400), the site has been visited and the offer analysed in detail.

From these investigations, some models have emerged.

a) *The Italian model: the parallel offers.* These are operators in which the presence of catalogues offering various countries making up the Adriatic-Ionian area have been reported, albeit separately, or rather only very rarely are integrated tours of the area present (or of some regions of such). The parallel offer of more than one destination of the eastern Adriatic dominates.

This is very common amongst Italian tour operators, numerically significant as compared with other European countries.

The attached table 1 lists the operators and the inclusion of offers/catalogues according to country of reference.

In the analysis carried out, 48 operators were found to fall into the above-stated category. Most of the time, the first integration model between areas concerns Croatia and Slovenia, with Montenegro and Albania included less often.

Catalogues on Greece are often also included in the operator offers that also have Croatia or other destinations in their portfolio. We should, however, stress that Greece is a catalogue of the larger tour operators.

Association with Bosnia Herzegovina is, instead, almost exclusively linked to the areas of Medjugorie.

Within these macro considerations, we can, however, find profiles and characteristics of the differentiated offer:

- many operators specialise in offering these geographical areas, and in particular countries of ex-Yugoslavia (approximately 30%) and, in any case, keep separate offer profiles (hence we have named this model 'parallel offers').

Only in rare cases is the Italian Adriatic offer accompanied by that of the eastern coast. Itermar is included amongst these (although we should also mention the Amatori group), tour operators from Cattolica, who, amongst other offers, offer their clients both the Italian Adriatic Riviera and the eastern Adriatic coastline. It does not, moreover, work in a promotion logic, rather the sales manager, spoken to over the telephone, states that these areas compete as they generally use the same markets, and Italy and Germany mainly.

In general, the major Italian tour operators are not overly specialised. Very often, the tourist offer comes from the agency activity on ticketing for ferries, now very common between the two shores (Amatori Viaggi, Cosmos Travel, Hassiten, to name just a few).

- Some integrated packages can be found amongst specialist operators. In particular, we would mention Amatori Viaggi, who offer accompanied tours in the eastern area in their catalogue.



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2° giorno: SPLIT – TROGIR
Dopo la prima colazione, incontro con la guida locale per la visita della città di Split e dei suoi più importanti monumenti. Al termine, tempo libero e pranzo in hotel. Nel tardo pomeriggio partenza per Trogir, cittadina dichiarata patrimonio dell'UNESCO nel 1997. Rientro a Split, cena e pernottamento.

3° giorno: SPLIT – MOSTAR
Dopo la prima colazione, partenza per Mostar. Costeggiando il mare si potrà ammirare lo splendido panorama della costa Dalmata. Lungo il percorso, sosta a Vidi, per la visita del parco e del museo archeologico di Narone. Proseguimento per Mostar. Sistemazione in hotel a pranzo.

8° giorno: SIBENIK – SPLIT
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N.B.: Per i clienti in arrivo dopo le ore 14:00 non potrà essere effettuata l'escursione a Crms e nulla verrà rimborsato.

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	950,00	225,00

La quota comprende:

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- pranzi in hotel o ristoranti come da programma
- servizio di guida locale a Split, Mostar e Dubrovnik
- assistenza di accompagnatore per tutto il circuito.

La quota non comprende:

- trasferimenti dall'aeroporto/porto di Split in hotel
- pranzi non indicati, bevande, ingressi, mance, extra in genere, tutto quanto non indicato alla voce "la quota comprende"

- The experiment of Croatia Experience, based in Loreto, is very interesting. They have combined ticketing with a stay in Croatia, giving their customers the possibility of visiting Marche or Rimini prior to embarking, thereby attempting to blend the offers of the two shores.

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La città di Rimini, famosa in tutto il mondo per le sue spiagge e le sue attrazioni dedicate sia ai giovani che alle famiglie, vi accoglierà per un week-end o una settimana prima di proseguire il vostro viaggio verso le coste dell'Istria o della Dalmazia.

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L'aeroporto di Ancona è servito dalle altre destinazioni europee come Barcellona Girona, Copenhagen, Liverpool, Londra Stansted, Monaco di Baviera, Mosca Domodedovo, Parigi Charles De Gaulle, Varna.

In the telephone interview, the owner of the company stated that this integration model of the tourist offers of the eastern Adriatic and those of the western Adriatic, can even be added to further. In its 2008 proposals, the company exploits the low cost flights arriving at Venice, Rimini, Ancona and Pescara, which connect various European countries with the Italian coast. At this point, packages of 3, 4 or 5 days stay in Italian areas are offered (Venice for beauty, Rimini for entertainment, etc...) before heading for Croatia, and the rest of the holiday. Vice versa coming from Croatia. Furthermore, the possibility of 'integrating' the events of these two countries is also being evaluated.

This is an offer model that has been developed as an 'embryo' around 5 years ago, and which today is being consolidated with a widespread network of agencies in Europe and specific agreements with Eurofly and Delta Airlines, with a Fly and Drive formula.

Generally speaking, the under-40s are more interested in this package, customers who are more used to an independent management of their holidays, and to building their own offers. The formula is not that of the accompanied tour, which is more typical for the middle aged or older, but certainly represents a model of reference for a reformulation of Adriatic offers from an integrated viewpoint.

b) *the integrated product. the USA and Canada.* In analysing the tourist packages of the north American market, various different integration elements have been identified in the offer. Despite the fact that there are many operators specialised in individual countries of the area, accompanied tours with different and differentiated itineraries are very common.

The list of north American operators providing tours of the area is provided in the attached table 2. There are approximately 40 operators (tour operators and large agencies). Only a few of these are particularly specialised in markets of the area, very often these are subjects operating on the global market, in which the 'Adriatic' offer represents a segment. In these cases, they also offer (acting as agencies) cruises or pilgrimages, that consider the area.

The following main considerations emerge:

- in relation to tourist itineraries, the integration element between countries of the eastern Adriatic remains strong. Typical itineraries, should they privilege the sea or nature, tend to involve areas from Slovenia to Greece, through Croatia, Montenegro and Albania. Other packages cover just a few of these routes.

Gli itinerari tipici



16

- Packages privileging cultural itineraries also include Sarajevo and Mostar, and sometimes also Serbia.
- In both cases, Venice is a sort of compulsory stopover, but in actual fact the presence of the regions of the western Adriatic is limited to this. The eastern Adriatic, instead, tends to be associated with the countries of the inland areas, up to the Black Sea.



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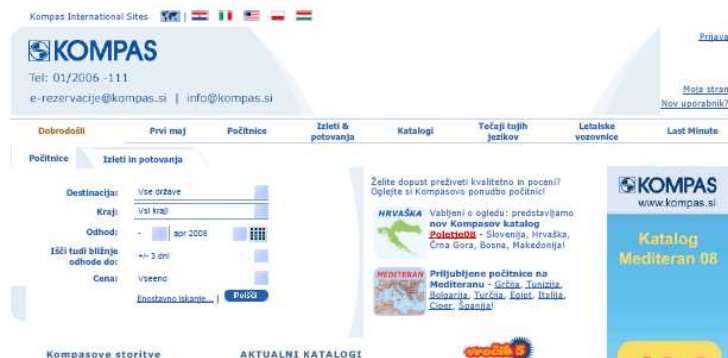


- Many integrated itineraries are sold by operators working in the adventure holiday sector, where there are many offers including Montenegro and Albania, but also Macedonia and countries that are not included in our circuit of reference. Of the more interesting operators in this field, we would mention *AdventureAbroad* and *Intrepid Travel*.



- c) *The European models*: represent a mixture of the position of the north American market and that of the Italian. Besides the travel proposals for individual countries or areas (which remain the most common formulas) there are proposals that copy the itineraries of the Adriatic, although these are somewhat rarer. We should mention a good offer of the Balkans from Tour Operators of the United Kingdom.

One of the most important European operators in terms of specialisation in holidays in the Balkans is Kompas, which has its general headquarters in Slovenia, but which operates throughout western Europe, as well as in the north American market. It is clear how the offer by the same operator can be divided up into different markets, showing a privilege given to the offer of integrated packages (and cruises) particularly in the United States, whilst there continues to be a distinction made between the individual countries of Europe.



d) *coincidental integration: pilgrimages.* The pilgrimage sector represents a stand alone offer. Both in Italy and in Europe or North America, there are some that operate with a great specialisation of offers of religious itineraries in the five continents. Of these, one operator, *206tours* stands out in particular, for the fact that it offers a religious itinerary pretty much everywhere. This operator's range of products is the widest of those analysed. We can state that all the others (see attached table 2) are a sub-segment of the product portfolio of *206tours*. For this reason, the detailed analysis of this tour operator provides us with complete indications as to the method of integration of the religious offer that concerns the Adriatic area.

It is clear that the strongest product in religious terms for the Adriatic area is Medjugorie.

In fact, in the world scenario, the pillars of religious offer are the Holy Land, the Vatican and Rome, and some Marian sanctuaries such as Lourdes in France, Fatima in Portugal, Santiago de Compostela in Spain, Guadeloupe in Mexico and, of course, Mejugorie in Bosnia Herzegovina.

Around these, further itineraries are often constructed, such as St. Paul between Greece and Turkey, the sanctuaries of France, Krakow, and Poland of Pope John Paul II, the Italian sanctuaries. Of these, Assisi is that offered most commonly, but the *religious sanctuaries* include Loreto, San Giovanni Rotondo, Lanciano, Padua, Orvieto and Siena.

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- Round-trip air from New York (special Add-on Airfare from all other US gateways)
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 - ~ 2 nights: San Francisco Hotel Monumento, Santiago De Compostela, Spain
 - ~ 1 night: Hotel Mundial, Lisbon, Portugal
 - ~ 2 nights: Santa Maria Jardim, Fatima, Portugal
 - ~ 1 night: Hotel Abba Fonseca, Salamanca
 - ~ 1 night: Hotel Abba, Burgos, Spain
 - ~ 3 nights: Hotel Paradiso of Scilla, Lourdes, Lourdes, France
 - ~ 3 nights: Hotel Cicerone or Guilinaia, Rome
 - ~ 2 nights: Hotel Gran Paradiso, San Giovanni Rotondo
 - ~ 3 nights: Hotel Giotto, Assisi
 - ~ 2 nights: Hotel Mediterraneo, Florence
 - ~ 2 nights: 2 nights: Hotel Biri, Padua
 - ~ 7 nights: A modern home/hotel with private baths in Medjugorje
- Breakfast and dinner daily
- Transportation by air-conditioned motor coach
- Guided tours and admission fees
- Hotel taxes and service charges
- Catholic Priest and Mass daily
- Baggage handling

127 out of 207 proposals are itineraries including Medjugorje, and include all possible combinations of holy places and Christian sanctuaries: from the simple proposal of the Marian sanctuary, to combinations with the great Christian destinations, and routes that include many French or Italian sanctuaries.

As such, the duration of the packages varies significantly from just a few days, even only 9/10, with prices starting from 1,500 - 1,600 dollars, up to 30-31 days, with a package value of around 7,000 - 8,000 dollars.

The religious itineraries including Greece are, instead, generally associated with Turkey and find the 'Pilgrimage of St. Paul' as a main common thread. Naturally, there are plenty of integrations with the great Christian religious destinations (the Holy Land, Rome) which therefore provide a constant factor in the construction of pilgrimage-related packages.

Adriatic Travel Inc., a Californian operator specialised in the tourist offers for the Adriatic area, has a section devoted to pilgrimages. The packages suggested are fewer than those offered by 206tours, and there is a greater presence of offers of countries facing onto the Adriatic. The most consolidated combinations of religious offer, however, are included: from the Holy Land, to Fatima, to Lourdes. Furthermore, the Italian itineraries do not privilege, or select only religious areas of the Adriatic: the attraction of Rome or Assisi is too great to exclude them from itineraries involving Italy.

ITALY AND MEDJUGORJE

Tour 11 - A Message of Peace, Conversion, Faith, Prayer, Fasting and Penance

Tour Highlights

- ◉ Roundtrip air on regular scheduled flights
- ◉ Transfers and sightseeing in air conditioned motor coach
- ◉ Round trip ferry ticket Ancona/Split/Ancona
- ◉ Services of a professional tour escort/guides
- ◉ Accommodation in first class hotels and superior tourist class hotels
- ◉ Accommodation in private homes in Medjugorje
- ◉ Breakfast and dinner daily
- ◉ All entrance fees, local taxes and luggage handling (one piece per person)

Itinerary

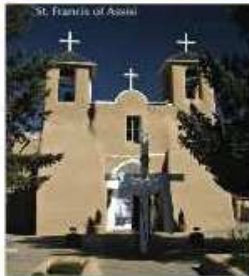
Day 1 Depart USA

Day 2 Milan/Padua

Arrival and a short panoramic tour of Milan. Drive to Padua and visit the Basilica that contains the remains of St. Anthony, patron saints of things lost.

Day 3 Padua/Venice/Padua

This morning we begin with a guided city tour in Venice to visit the Golden



Day 5 Orvieto/Cascia/Assisi
Our morning visit in Orvieto includes the Cathedral, located in the town's main square, which is the landmark of the tiny city. View the holy corporal containing the blood from the Eucharistic Miracle of Orvieto in 1263 that occasioned the proclamation of the Feast of Corpus Christi. On to Cascia to visit the Basilica of St. Rita that contains Rita's incorrupt body. Continue to Assisi.

Day 6 Assisi/Loreto/Ancona

Today we explore the hilltop birthplace of St. Francis. Visit the Basilica of

we depart Medjugorje to Split. We tour the old city with its Roman heritage and its Renaissance and Gothic structures. Visit the Roman ruins and the Cathedral of St. Dominus, the town's patron saint. Overnight ferry boat to Ancona.

Day 10 Ancona/San Giovanni

Arrive in the morning to Ancona, Italy from where we continue our visit of Italy. On our way to San Giovanni Rotondo, we stop in Bari and visit the tomb of St. Nicholas.

Day 11 San Giovanni Rotondo/Monte Sant'Angelo

We will spend the day in and around San Giovanni to see the places associated with St. Pio. Visit the Shrine of Our Lady of Grace that houses the tomb of Padre Pio. Later we visit the Grotto of Michael the Archangel in Monte Sant'Angelo. Many Popes have knelt in prayer here seeking the protection of St. Michael.

Day 12 San Giovanni Rotondo/Pompeii/Monte Cassino



"Send me your guardian angel."
Padre Pio

MIRACLES OF THE EUCHARIST

Tour 20 - Venice, Padua, Siena, Assisi, Cascia, Loreto, Lenciano, San Giovanni Rotondo, and Rome Including Papal Audience

Tour Highlights

- ◉ Roundtrip air on regular scheduled airlines
- ◉ Transfers and sightseeing in air conditioned motor coach
- ◉ Services of a professional tour escort/guides
- ◉ Accommodation in first class and superior tourist class hotels with private facilities
- ◉ Breakfast and dinner daily
- ◉ All entrance fees, local taxes and baggage handling (one piece per person)
- ◉ Papal Audience and Holy Mass arranged as per group

Itinerary

Day 1 USA/Milan

Upon arrival we will be welcomed to Italy by our Tour Escort. After a short panoramic city tour of Milan, we continue to Padua, the home of St. Anthony, patron saint of things lost. Visit the richly decorated tomb inside the Basilica that contains the remains of the beloved miracle-worker. One of the Catholic Church's greatest preachers, his incorrupt tongue is kept in the Chapel of the Reliquaries.

incorrupt head of St. Catherine at the Basilica of St. Dominic. Continue to Orvieto to see the Cathedral, located in the town's main square and is the landmark of the tiny city. View the holy corporal containing the blood from the Eucharistic Miracle of Orvieto in 1263 that occasioned the proclamation of the Feast Corpus Christi.

Day 5 Orvieto/Assisi

Today we explore the hilltop birthplace of St. Francis. In the crypt of St. Francis Basilica lies the tomb of one of the most beloved saints of all time, St. Francis of Assisi. See the Basilica of St. Clare and the Crucifix from which Jesus spoke to St. Francis, Basilica of St. Mary of the Angels and the place where the Miracle of the Eucharist of Assisi took place in 1240, and the Porziuncola (located on the lower plains of Assisi).

Day 6 Assisi/Cascia/Loreto

Depart this morning to Cascia, the site of our next Eucharistic Miracle. Visit the Basilica of St. Rita, the Chapel with St. Rita's incorrupt body, the Eucharistic Miracle, Relics of St. Rita, including her wedding ring and habit in the Monastery of St. Rita, and the Crucifix from which St. Rita received the stigmata. We follow the Adriatic coast to the great Marian shrine of



Day 9 San Giovanni Rotondo/Pompeii/Monte Cassino/Rome

Drive to Pompeii and tour the ancient ruins including the Temples of Apollo, Jupiter and the Forum, the commercial district and a Pompeii Bakery.



"I am the living bread which came down from heaven. If any man eat of this bread, he shall live for ever; and the bread that I will give, is my flesh, for the life of the world."

We should point out how, as an attempt to offer an 'all-Adriatic' religious itinerary, the package of the Marian sanctuaries of Croatia combined with Medjugorje. This is, however, an exception that is compatible with the great specialisation of the Adriatic market of Adriatic Travel, and with the attempt to enrich the offers involving this area.

In brief, currently, although in the full offer of Christian sanctuaries in the Adriatic regions, any combinations, itineraries proposed, are only coincidentally linked to the area. Instead, they really meet the need to enrich and to complete the offer of the great Christian destinations, of which, in the American market, only Medjugorje would appear to be part.

e) *a truly integrated market: cruises.* Cruises are the real integrated tourist integrated product in the area, as it is highly recognized and identified on the market. In this respect the Adriatic is a sub-market of the Mediterranean market, whereby the latter represents a large share of the global cruise market. It is namely known that the Caribbeans, the Mediterranean, Northern Europe and the East are the macrosegments of cruise market .in terms of destinations.

Also thanks to the boom currently experienced by the cruise segment, the Adriatic has now reached undebatable levels of growth and can boast a very large offer range both in terms of itineraries and in terms of services and prices.

All major navigation companies, ranging from the Carnival Group that comprises Costa Crociere and MSC, to Royal Carribbean to Star Clippers, are present in the Adriatic.

Yet together with these big players many other navigation companies can be found, oftentimes from the United States, as the vast majority of cruise tourists worldwide come from the United States. These companies have smaller cruise ships but are often able to meet a top market demand (luxury cruises). Motor sailer cruises represent ever more of a niche market segments.

The annexed table 4 shows the complete list of the analyzed 25 US companies that offer cruises in the Adriatic, among other destinations. Though based in the US, many of them are of different origin, however offers for the American target market are always present.

As for itineraries, the analysis of the offers made by these companies has allowed to identify three compulsory stopovers in the Adriatic and Ionian Area, i.e. Venice, Dubrovnik and Croatia in general, and Corfu and the Greek Islands. Together with the above destinations, Kotor in Montenegro and Saranda in Albania appear to be increasingly present in the wish list of cruise tourist destinations.

SOME EXAMPLES OF CRUISE CLASSICAL ITINERARIES IN THE ADRIATIC

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- Caribbean & Mexico Cruises
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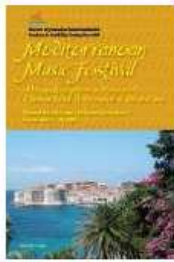
- THE MEDITERRANEAN
- NORTHERN EUROPE & THE BALTIC
- AFRICA & THE INDIAN OCEAN
- THE FAR EAST & SOUTH PACIFIC
- ALASKA & THE PACIFIC COAST
- THE CARIBBEAN & MEXICO
- SOUTH AMERICA & THE AMAZON
- TRANSOCEANIC



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21

Within the above itineraries, theme-specific cruises are also organized. These are often linked to food and wine or music. Travel Dynamics International offers, by way of example, a cruise along the entire Eastern shore of the Adriatic with music as its linking thread: the package is namely offered as the Mediterranean Music Festival and features internationally famous concert artists performing on topics, which are closely related with the cruise stopovers. This is thus a luxury cruise with rates starting from 8,000.00 dollars.



strong musical instincts, and first rate chops" (*Boston Globe*). The ensemble of eminent musicians is rounded out by soprano, **Brenda Rae**; pianist, **William Hobbs**; cellist, **Scott Kluxsdahl**; flutist, **Marya Martin**. We are also delighted to have aboard **Martina Arroyo**, the world-class soprano, who will share with us the highlights of her illustrious career, which included twelve seasons at the Met, during an informal evening of conversation.

The musical events promise to be utterly magical, and together with the other unique adventures that await you—be it a luncheon at an organic 17th-century farm in Crete or a walking tour of labyrinthine streets of Montenegro's stunning medieval city of Kotor—this voyage promises nothing short of its own kind of unforgettable opus.

Your home for this enchanting journey will be the graceful, 114-guest, all-suite *Corinthian*. It is at once large enough to offer all the amenities of a large cruise ship, such as a spacious restaurant, two comfortable lounges, a gym and a sun deck with a Jacuzzi, but small enough to navigate small inlets and harbors and lend an intimate feel to our musical adventure.

If you love classical music, as well as thought-provoking travel, don't miss the opportunity to combine both passions on this melodic odyssey in what is arguably the most beautiful part of the Mediterranean.

Itinerary



The stopovers made in the Adriatic are sometimes just one part of the overall itineraries of a cruise trip. These cruises are often of longer duration and refer to very long trips affordable only at very high prices.

In these cases the Adriatic is combined with both the Western and the Eastern Mediterranean Sea, including the Black Sea. In some cases cruises even go beyond the same Mediterranean.

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*Remain connected to the world
as much, or as little, as you want.*



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The price bracket for cruises in the Adriatic ranges from some hundred euros to very high prices, when the stopovers in the Adriatic are part of much longer cruise trips.

The marginal role played by Western Adriatic, with the exception of Venice, clearly emerges from the cruise packages. The same applies to accompanied tours. Costa Crociere and MSC, i.e. the most important navigation companies in the Mediterranean, have Ancona e Bari as their reference stopovers, with Bari being the home port for MSC for Eastern Mediterranean cruises. Yet it clearly emerges that many North-American companies of the sector clearly prefer the Eastern part of the Mediterranean. This choice has positive repercussions also on Montenegro and Albania, whose shores are reached by the itineraries from North to South and viceversa.

This marginal role can be well explained by the itinerary of a navigation company, with a stopover in the port of Ancona. The suggested itinerary, however, includes Umbria.

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ITINERARY

TO CALL BUTLER
RING BELL

- CHOOSE OTHER:
- Other Regional Cruises
 - Cruises around this time

Ship: Nautica Sailing Date: October 13, 2008

Day	Port	Arrive	Depart
1	Venice, Italy		
2	Venice, Italy		6:00PM
3	Pula/Rovinj, Croatia	8:00AM	6:00PM
4	Umbria (Ancona), Italy	8:00AM	6:00PM
5	Dubrovnik, Croatia	9:00AM	11:00PM
6	Kotor, Montenegro	8:00AM	5:00PM
7	Sarande, Albania	7:00AM	12:30PM
7	Corfu, Greece	3:00PM	11:00PM
8	Cruising the Ionian Sea		
9	Aghios Nikolaos (Crete), Greece	8:00AM	6:00PM
10	Santorini, Greece	8:00AM	6:00PM
11	Kusadasi, Turkey	8:00AM	6:00PM



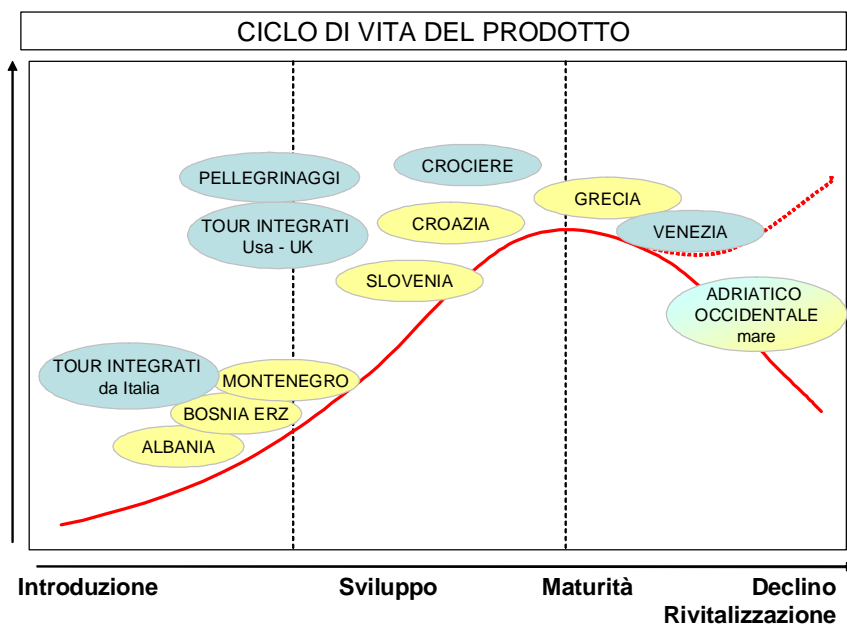
E. MEDITERRANEAN & GREEK ISLES

3.2 Conclusions and guidelines for the strategic plan

In the light of the above analyses, some conclusions can be drawn as regards the tourist system in the Adriatic and Ionian Area. These conclusions have been reached on the basis of a SWOT analysis and can be summarized as follows:

<i>STRENGTHS</i>	<i>WEAKNESSES</i>
<ul style="list-style-type: none"> • Strong attraction capacity of the Adriatic area as a whole (21 million international arrivals) and of the Ionian area (15 million international arrivals). • Presence of absolute tourist excellencies, which are strongly consolidated on the market, i.e. the Greek Islands, Venice and the Croatian coast. • Widespread potential in terms of primary attraction factors (nature, culture, sea, gastronomy, religious itineraries) • Consolidated single image (Adriatic product), which is well recognized on the cruise market, where offer integration is a structural feature of the segment concerned • Presence on “distant markets”, and more experimentally also in Europe, of tourist packages that actually include Balkan countries, also emerging ones 	<ul style="list-style-type: none"> • Big imbalance between highly attractive areas (Croatia, Venice, Greece) and areas that are considered to be marginal in international tourist circuits. • Imbalance also among countries with a large number of quality accommodation facilities and countries where these are scarcely present. • General lack of a recognized single image for the Adriatic and Ionian area. The Adriatic Sea normally evokes images of its Eastern shore, whereby the Western Adriatic shore plays a marginal role. • Italian Adriatic regions are rarely included in the Italian itineraries of international tour operators, except for Venice, and are equally not included in the offers for the Eastern Adriatic area.
<i>OPPORTUNITIES</i>	<i>THREATS</i>
<ul style="list-style-type: none"> • International demand is in rapid growth and consumers can choose among an increasingly varied range of destinations. • The characteristics of international demand when it comes to the evolution of the profile of tourists or the increase of active tourist segments, can find a detailed answer in the tourist offer by Adriatic and Ionian territories. • New big markets are emerging, from which international tourists can come, i.e. Russia, China, India. These markets should be focussed on to adequately promote the Adriatic and Ionian area as a tourist destination. 	<ul style="list-style-type: none"> • Increase in the international competition between tourist destinations • Possible effects of the internal competition between the areas of the Adriatic and Ionian basins, without effective and integrated promotion initiatives.

If one were to briefly position the countries and tourist products in the area within a theoretical product life cycle, the emerging picture is quite clear. Greece and Croatia are definitely the most mature tourist areas, as well as the ones that, for the time being, are the most consolidated in the overall Adriatic and Ionian area. The Slovenian market is also solid and rapidly growing. Emerging countries include above all Montenegro, Bosnia-Herzegovina and the more distant Albania. The Western Adriatic is internationally perceived as a declining area, as its image is mainly linked to the sea as tourist product.



In terms of product, instead, Venice undoubtedly represents a mature tourist product, which is however continuously being revitalized, hence the difficulty to place it within a standard life cycle. Cruises, i.e. a tourist product that is very much linked to Venice and Croatia, are in a phase of development/maturity. Pilgrimages are experiencing a strong growth, and also integrated tourism from the United States and Northern Europe is rapidly growing, whereby integrated tourism is almost entirely targeted to Eastern Adriatic countries. Some first hints of integrated tourism are registered also from Italy.

4 THE STRATEGIC PLAN

The results emerged from the analyses help reconsider some initiatives, which were started in the past few years, and interpret them within the framework of a strategic plan that can provide an overview of what has been achieved and indicate some guidelines to guide the future activities of the Workgroup.

4.1 Mission

The mission pursued with the initiatives started by the Workgroup for Tourism is to *strengthen the image of Adriatic and Ionian territories as a whole especially on international markets, thereby highlighting their varied character and the multifaceted nature of the tourist products characterizing them. In this respect, promoters aim at enhancing the development of all those initiatives that can help provide a single and integrated image of the area.*

4.2 The strategic choices made: the tourist label of the area.

The main action strategy is based on the realisation of an area label, whose main aim is to reinforce the image of the area on the outside tourist market (especially on new international circuits) within the logic of a single system.

The label identified during the 2007 Portonovo Forum as the result of an online competition was ADRION, whose *pay off* reads “Adriatic and Ionian Lands”, thereby highlighting not only the sea component, but also all tourist attractions offered by the territory.

The label image draws its inspiration from a Corinth column, whose shaft evokes a Roman amphitheatre and whose capital suggests the idea of a wave sea. The following are the typical elements characterizing the brand:



- joint belonging to the Adriatic and Ionian Sea;
- variety of tourist products offered around the above sea. in this respect, the slogan for the ADRION initiative, which will be published in the institutional brochure, is “*The sea in the middle*”;
- preference given to tourist offers and packages which draw their inspiration from the fact that they belong to the same area and offer more destinations of various countries.

The label is the property of the Forum, which with this operation aims at

- help private tourist operators promote themselves on international tourist markets with more strength and greater support by institutions;

- support tourist operators in rethinking those tourist products, that are less and less appreciated on tourist international circuits;
- promote deseasonalization developments, thereby allowing tour operators to formulate new offers in comparison to traditionally sold products;
- support those tourist areas, which are still growing too slowly, through a link with more established tourist areas;
- provide consumers/tourists with the possibility of an immediate identification with the tourist services and products of the area.

Alongside with these aims, whose common element lies in the willingness to support the market more strongly, the commitment by promoting players should be highlighted, who have tried to look for a better coordination as regard the tourist initiatives in the area, thereby trying to use available resources in a more rational way.

4.3 Actions to implement the area label.

Once the tourist area label has been realized, it is necessary to define a whole series of actions that make it possible to implement it, use it by interested players, or spread it on target markets.

The following are the fundamental steps for these action guidelines. "Action options" are identified for each of them, with said action options representing elements supporting the decisions that will have to be made.

4.4 1st step setting up a coordination committee

The working modalities for implementing the actions foresees a range of steps, whose starting point is, however the setting up of a coordination committee. This will act as a *super partes* body, whose ultimate aim is to guide the initiatives of all the players involved towards the attainment of common goals.

This organization can coincide with the Coordination Committee of the Workgroup for Tourism, which should be supported by some private tour operators for the skills it can convey.

Typically, an organization of this kind must anyway meet the representativeness needs of the players involved in terms of knowledge of the territory and tourist skills, but it must also be lean and able to act rapidly.

The organization tasks involve the following:

- follow and coordinate all the actions foreseen for the realization of the initiatives that are linked to the label;
- inform and raise the awareness of institutional players and private individuals on the aims of the tourist label and of the initiative that started it;
- periodically monitor and assess results, so as to start possible correction measures.

SUPER PARTES ORGANIZATION: STRATEGIC OPTIONS

<i>Coordination committee of the Workgroup for Tourism</i>	<i>New Coordination committee</i>
Constraints: Representativeness of territories and worker's associations: Highly work-oriented structure	

4.5 2nd step: network creation and internal communication

The creation of the ADRION tourist label presupposes that all tourist *stakeholders* of the territories concerned are actively involved, although work should be carried out gradually to guarantee that everybody becomes fully aware of the project value.

It is however necessary to create a real cooperation and collaboration network, thereby bearing in mind the following strategic objectives:

- I. favour the promotion of the tourist label and image through initiatives, which directly involve the FORUM and the network of its 36 chambers of commerce.
- II. favour the development of commercial initiatives put forward by private tour operators, especially when it comes to the creation of integrated tourist packages.

The two strategic lines above are clearly closely related one to the other. The more solid the communication activities implemented by institutional players, and the higher the number of institutional stakeholders, i.e. not only chambers of commerce, involved in the initiative, the greater the ability to attract commercial players in the ADRION initiative.

To enhance the active participation of tour operators and for the benefit of the action coordinated by the Forum chambers, it is first and foremost necessary to set the rules to join the ADRION initiative and above all its label.

Basically two strategic actions can be carried out. These are summarised as follows:

CREATION OF THE NETWORK AND ITS RULES: STRATEGIC OPTIONS

	PULL STRATEGY	PUSH STRATEGY
	DRAWING UP OF A SET OF RULES OF ADMISSION TO THE USE OF THE TOURIST LABEL FOR BODIES AND PRIVATE PLAYERS	COMMON ADMISSION RULES FOR CHAMBERS OF COMMERCE INVOLVEMENT THROUGH THE FORUM CHAMBERS (“APPOINTMENT BY COOPTION?”) OF SELECTED TOUR OPERATORS, WHO WILL BECOME PROJECT PARTNERS
CHARACTERISTIC	<ul style="list-style-type: none"> • Aims of the Label, • Types of label licensees (public and private), • Foreseen use (presence of elements of integration between the offers of the area) • Possible charges, • General rules of admission (applications, investigation, checks, approval, signing of the agreement) • Rules concerning standards and formats to maintain in the use of the label • Norms on the use of patronage, which can be granted for public events (events, conferences...) • Norm violations/clauses on label revocation. 	<ul style="list-style-type: none"> • Definition of standards (uniform format for brochures, standards for placards, etc....) for label use by the chambers, so as to maintain a uniform and coordinated image. • Norms on the use of patronage, which can be granted for public events (events, conferences...) • Use of the label granted only to those players, with whom the Forum chambers have agreed on a shared system of rules (actual presence of integrated tourist packages, availability to training activities, etc....)
MANAGING SUBJECT	<ul style="list-style-type: none"> • Coordination Committee 	<ul style="list-style-type: none"> • Coordination Committee
BENEFITS	<ul style="list-style-type: none"> • Explicit rules, bottom-up approach, 	<ul style="list-style-type: none"> • Gradual approach: the Forum chambers are obliged to use the label only on certain occasions and in specific ways • The tour operators allowed to participate in the partnership are selected at the source, whereby chambers of commerce and the Coordination Committee can play a more discretionary role • This can be the first step (test) for a later implementation of the PULL strategy.
DEFICITS	<ul style="list-style-type: none"> • Burdensome control and certification activities in case of close-meshed system • Risk of poor selectivity / quality in case of large-meshed system, with the possible consequence of a loss in the value of the label itself 	<ul style="list-style-type: none"> •

In the PUSH approach, only tour operators should be selected, who really stand out from the others for their motivation, their central role in comparison to their business, their availability to be trained on the ADRION initiative, alongside with the possibility for them to propose integrated tourist offers.

At this stage the above subjects can use the label only to promote integrated tourist offer initiatives and always within the limits set to the Forum chambers of commerce too in terms of common graphics, formats, image size. Furthermore, their tourist packages would also be promoted through the ADRION portal.

Training to tour operators working in the area, especially within those contexts where tourist culture is not yet well-established, can represent a decisive measure to involve them in the initiative.

In this respect, within the framework of the TERRITORIAL INITIATIVE PROJECTS (TIP) for international solidarity and development cooperation for the three-year period 2007/2008/2009, published by the Marche Region, the Chamber of Commerce of Ancona presented the AdrionTour project, whose aim is to raise the awareness of private tour operators on the opportunities offered by the market, to facilitate their meeting with international tour operators, and to support them in creating tourist packages under the Adrion label. This can be achieved through adequate training and direct support to tourist companies. If the project is financed, it will allow the start of the above initiatives in Albania, Bosnia-Herzegovina and Montenegro.

In the PULL approach, once the rules on the adoption of the labels are set, the Coordination Committee will have to the task to act as managing subject for the label. This presupposes consistent bureaucratic and administrative tasks to fulfil (keeping of registers, check of the applications, starting of proceedings, inspections, etc...), as well as control and monitoring activity on the facilities and the initiatives that applied for the label. The Coordination Committee would in this case act as a “certifying body”, with all related consequences.

If the criteria ruling the use of the label are not so strict, there exists the risk to create a network of subjects who might be poorly qualified, thereby reducing the effectiveness of the label and the value of its image.

4.6 3rd step: external communication.

This action will guide in a synergic way all communication and promotion activities of the institutional chamber network, in those cases when the ADRION label is used.

The general drafting of the communication plan will have to provide an answer to some clear fundamental questions. The following table shows the guidelines identified, which will have to be shared and agreed upon with the Forum members.

STEPS FOR THE DRAFTING OF AN INTEGRATED COMMUNICATION PLAN

What are the main objectives we want to achieve with the tourist label for the Adriatic and Ionian Area?	Who are our target customers?	What mix of tools are we going to use?	What is the timing set?
Awareness-raising on the ADRIATIC-IONIAN area as a whole	<ul style="list-style-type: none"> ○ Tourists and tourist agencies (from Northern Europe? From which country?) ○ DIY tourists? 	<ul style="list-style-type: none"> ○ Development of advertising material ○ Participation in trade fairs ○ Educational tours ○ ○ ○ Development of a web portal (contents, promotion) 	○
Development of more integrated tourist packages	<ul style="list-style-type: none"> ○ International tour operators (from the Adriatic-Ionian area, from outside the Adriatic-Ionian area) 	<ul style="list-style-type: none"> ○ Exhibitions ○ Events ○ Conventions ○ Co-marketing actions with private tour operators 	

The aim is to implement a first planning effort, which is able to effectively act as guidance for future actions.

Some communication tools have already been realised in the form of prototypes, some others have been developed in a more structured way. Specifically, the following tools have already been realised:

- An institutional brochure, which has been prepared in such a way, so as to present the area with images of the main tourist attractions in each region and the main factors that characterize the area: sea, nature, culture, spirituality, food and wine and living well.
- A tourist web portal, which takes the main attraction factors identified in the area as starting points and offers the possibility to access information on each single territory with links and reference websites. The portal also makes it possible to view information on each single territory in a geo-referenced way. Once the desired topic has been selected, this makes it possible for the portal to show all the places in the Adriatic basin that the topic concerned refers to, with additional information on the place (i.e., historical, cultural, service-oriented, etc....).

Similarly, also the integrated tourist packages proposed by the tour operators who will be part of the ADRION network can be georeferenced.

The entire portal has thus been created to present within the logic of a better presentation of the Adriatic and Ionian basins, thereby highlighting the elements of integration between the various territories.

The portal is mainly targeted to DIY tourists, but it can also be useful information too for tourist agencies that offer packages in the area.

Alongside with these basic tools, there can be a wider range of instruments that can be used for external communication.

When it comes to choosing the tools, however, it is necessary to work beforehand on the objectives to reach, thereby considering all possible constraints, including budget limitations that must always be included. Objectives may include single markets, whereby each of them should be approached differently.

By way of example, the following table refers to a series of tools that can be activated to implement communication.

Also on the basis of the information emerged from the interviews and the contacts established with tour operators, a new market can be approached with targeted communication tools , i.e. the so-called below-the-line tools, like educational for agencies or journalists, trade fairs, PR activities. Starting advertising campaigns on the media in any target country having a significant potential is very costly and this action may turn out to be poorly effective if advertising is not carried out frequently and with continuity.

COMMUNICATION TOOLS: WHAT MIX IN A TARGET COUNTRY?
STRATEGIC OPTIONS (PRIORITIES)

	<i>Description</i>	<i>Specific targets</i>	<i>Prevailing targets</i>	<i>Priorities</i>
1. Publications				
Monographs				2
Brochures				1
Press kits (dossier for the press)				1
Trade fair kits				1
2. Merchandising				
Placards, posters				1
Promotional items				1
Gadgets – decalcomanias				1
3. Multimedia projects				
Web portal				1
Multimedia CDs				2
4. Advertising				
Development and realization of the advertising campaign				3
Marketing actions with private tour operators				2
Publications and editorials				2
6. Presentations				1
Presentations to the press				1
Participation in trade fairs				1
Educational tours for agencies and journalists				1
Workshops/Congresses and conferences				1
Events and sponsorships				1
Public relations				1

At this stage, the detailed planning of activities, specific objectives and targets, costs, resources, responsibilities, priorities and result parameters must be carried out for each action / tool foreseen.

COMMUNICATION TOOLS: BUDGET DEVELOPMENT PLAN

	<i>Estimated cost</i>	<i>Organization resources</i>	<i>Responsibilities</i>	<i>Result parameters</i>
1. Publications				
Monographs				
Brochures				
Press kits (dossier for the press)				
Trade fair kits				
2. Merchandising				
Placards, posters				
Promotional items				
Gadgets – decalcomanias				
3. Multimedia projects				
Web portal				
Multimedia CDs				
4. Advertising				
Development and realization of the advertising campaign				
Marketing actions with private tour operators				
Publications and editorials				
6. Presentations				
Presentations to the press				
Participation in trade fairs				
Educational tours for agencies and journalists				
Workshops/Congresses and conferences				
Events and sponsorships				
Public relations				

5 GUIDELINES FOR 2008-2009: OUTLINE OF MEASURES AND ACTION PLAN

The action plan for the next 12 months should include all those measures necessary for the Adrion label to become fully operational. Specifically, this includes

- Strategic choices made by the project coordinating body (Coordination Committee of the Workgroup for Tourism or other subject?) and modalities to build the network (Push or Pull method?);
- the first operational steps of the coordination committee in identifying the communication/decision targets of a target market, definition of action strategies and budget;
- realization of the necessary tools for effective communication actions on the selected market,
- realization of some targeted communication initiatives.

Decisions and activities	2008										2009		
	A	M	J	J	A	S	O	N	D	J	F	M	
Decisions on the nature of the Coordination Committee (CC). Identification of members													
Decisions on the modalities to be allowed to use the label (PUSH or PULL method) and membership application presentation (at least for chambers)													
Network creation: selection and training of partner tour operators													
CC: Definition of annual strategic objectives and identification of a target market													
CC: Definition of strategy, tool mix, resources to deploy for the admission of the target country													
Completion of tools (including the web portal)													
Implementation of actions (trade fairs? educational, meetings with the press?)													
Reporting by the CC at the 2009 Forum													

COMMITMENTS FOR THE CHAMBERS

<i>Decisions and activities</i>	<i>Type of commitment required to the Forum Chamber</i>
Decisions on the nature of the Coordination Committee (CC).	Shared strategic choice on the characteristics and composition of the Coordination Committee (to be made during the 2008 Forum)
Decisions on the modalities to be allowed to use the label (PUSH or PULL method) and membership application presentation (at least for chambers)	Shared strategic choice (to be made during the 2008 Forum)
Network creation: selection of partner tour operators	Identification of 2/3 reference tour operators. Availability to organize information/training activities on the Adrion project
CC: Definition of annual strategic objectives and identification of a target market	Approval of the CC plan
CC: Definition of strategy, tool mix, resources to deploy for the admission of the target country	Approval of a budget
Completion of tools (including the web portal)	
Implementation of actions (trade fairs? educational, meetings with the press?)	Sharing of human, organizational and financial resources
Reporting by the CC	Approval of the 2008-2009 activities and launch of the 2009-2010 activities

6 ANNEXES – TOUR OPERATORS AND TOURIST OFFERS ANALYSED

Table 1 – Italian tour operators compared by parallel offers

Name	italy	Croatia	slovenia	Montenegro	Albania	Greece	Bosnia-Herz.
AGESTEA - VACANZE AGESTOUR		X		x	x		
AMATORI - CUTTY SARK		X	x	x	x		
ATERNUM VAIGGI		X	x	x			
AURORA VIAGGI		X	x			x	
BREVIVET		X	x				x
CARAVANTOURS		X	x				
CHARMING HOUSE by Equatour		X	x				
CLUANA VIAGGI		x		x			
COSMOS TRAVEL		x	x	x		x	
EIRENE TRAVEL T.O. by Kinos		x				x	
ETERIA VIAGGI	x	x					x
EUROMOND		x		x			
EXECUTIVE TRAVEL SERVICE		x	x			x	
EXTEMPORE VIAGGI		x	x				
FIRMATOUR	x	x	x				
FOSCHILANDIA		x	x				x
FRASE VIAGGI		x	x	x	x		
GUINNESS TRAVEL		x	x				
HASSITEN VIAGGI		x		x		x	
HOT WINGS VIAGGI	x	x					
I VIAGGI DELLE PLEIADI		x	x				
IL CERCHIO VIAGGI		x					x
IL PICCOLO TIGLIO		x	x	x			x
INICOM Viaggi - Croatia Experience	x	x					
ITERMAR		x	x	x	x		
KOMPAS		x	x	x			
LIBARNA VIAGGI	x	x					
LOLIMAR		x	x				
LORUSSO		x	x				
MIMANDI VIAGGI		x	x				
NOBILTOUR	x	x	x				
NUOVAGONDOLA by LARVIAGGI		x	x			x	
OBY WHAN		x				x	
OLTRE OGNI META		x	x				
PODIUM T.O.		x				x	

PROSPETTIVE 2000	x	x	x	x
RUSCONI VIAGGI	x			x
SAN MARINO T.O.	x	x	x	x
SUPERADRIA - Fil. Italia	x	x		
TECNO TURISM srl	x	x	x	
VIAGGI & MITI T.O.	x	x		
VIAGGI CONCHIGLIA	x	x		
VIAGGI OGGI		x		x
VILORATOUR		x		x
VIRTUS VIAGGI		x		x
VISUAL VIAGGI		x		x
ZAINETTO VIAGGI srl		x	x	
ZANGARDI TOURS	x	x	x	

TABLE 2. NORTH AMERICAN TOUR OPERATORS OFFERING INTEGRATED TOURIST PACKAGES

<i>name</i>	<i>web site</i>
ABERCOMBIE & KENT INTL.	www.abercrombiekent.com
ADRIATIC LUXURY JOURNEYS	www.adriaticluxury.com
ADRIATIC SUNSHINE TRAVEL	www.adriaticsunshine.com
ADRIATIC TOURS	www.adriatictours.com
ADRIATRIPS	www.adriatrips.com
ADVENTURES ABROAD TRAVEL	www.adventures-abroad.com
AMERICAN TRAVEL ABROAD	www.amta.com
ATOURZ	www.atourz.ca
AUXANO ADRIATIC TRAVEL	www.auxanotravel.com
BEACH'S MOTORCYCLE ADVENTURES	www.bmca.com
CENTRAL HOLIDAYS	www.centralholidays.com
CICLISMO CLASSICO. INC	www.ciclismoclassico.com
CROATIA TRAVEL	www.croatiatravel.com
EARTHBOUND EXPEDITIONS	www.earthboundexpeditions.com
EURO GROUPS	www.eurogroups.com
FRIENDLY PLANET TRAVEL	www.friendlyplanet.com
GATE 1 TRAVEL	www.gate1travel.com
GENERAL TOURS	www.generaltours.com
GRAND CIRCLE TRAVEL	www.gct.com
GRAND EUROPEAN TOURS	www.getours.com
HIGH COUNTRY PASSAGE	www.highcountrypassage.com
INSIGHT VACATIONS	www.insightvacations.com
INTREPID TRAVEL	www.intrepidtravel.com
JAUNTEE - CROATIA EXPERT TRAVEL PLANNING	www.jauntee.com
KOMPAS HOLIDAYS	www.kompas.net
KUTRUBES TRAVEL	www.kutrubesttravel.com
MADRIATIC BLU	www.madriaticblu.com
ODYSSEYS UNLIMITED	www.odysseys-unlimited.com
SLOVENIA TRAVEL	www.sloveniatravel.com
SMARTOURS	www.smartours.net
STERLING VACATIONS	www.sterlingvacations.com
TRAVCOA	www.travcoa.com
TRAVEL TIME	www.traveltimeny.com
VANTAGE TRAVEL	www.vantagetravel.com
AUSTRIAN VACATIONS	www.austrianvacations.ca
CTH TRAVEL	www.cthtravel.com
ELDERTREKS	www.eldertreks.com
GAP ADVENTURES	www.GAPadventures.com
INCURSION VOYAGES	www.incursion-voyages.com
JERRY VAN DYKE TRAVEL SERVICE	www.jerryvandyke.com

TABLE 3. NORTH AMERICAN TOUR OPERATORS SPECIALIZED IN PILGRIMAGES

<i>name</i>	<i>address</i>	<i>web site</i>
EDUCATIONAL TRAVEL	P.O.Box 6929 ; Lakeland, FL 33807	www.ets.travelwithus.com
206 TOURS	289 E. Main St.; Smithtown, NY 11787	www.206tours.com
ADRIATIC PILGRIMAGES	777 West 9th Street; San Pedro, CA 90731	www.adriatictours.com
ADRIATIC SUNSHINE TRAVEL	4619 N. Lincoln Avenue; Chicago, IL 60625	www.adriaticsunshine.com
CORPUS CHRISTI PASSAGE	PMB #384; 14493 SPID, Ste A; Corpus Christi, TX 78418	www.passagetravelagency.com
PEACE CENTER TOURS	558 Park Avenue; Elmhurst, IL 60126	www.peacecentertours.com
REGINA TOURS	494 8th Ave, 22nd floor; New York, NY 10001	www.regina-tours.com
SELECT INTERNATIONAL	916 Somerset St.; Watchung, NJ 07069	www.selectinternational.tv

TABLE 4. NORTH AMERICAN TOUR OPERATORS SPECIALIZED IN CRUISES

<i>name</i>	<i>address</i>	<i>web site</i>
ADRIATIC TOURS	777 W. 9th Street; San Pedro, CA 90731	www.adriatictours.com
CAROL KENT YACHT CHARTERS	77 N. Washington St. ,Ste # 200; Boston, MA 02114	www.carolkent.com
CELEBRITY CRUISE LINE	1050 Caribbean Way; Miami, FL 33132	www.celebrity.com
COSTA CRUISE LINE	200 South Park Rd., Ste.200; Hollywood, FL 33021	www.costacruises.com
CRYSTAL CRUISES	2049 Century Park East, #1400; Los Angeles, CA 90067	www.crystalcruises.com
CUNARD, INC.	24844 Avenue Rockefeller, Valencia, CA 91355	www.cunard.com
ELEGANT CRUISES & TOURS	24 Vanderverter Av.; Port Washington, NY 11050	www.elegantcruises.com
HOLLAND AMERICA LINE	300 Elliott Ave. W; Seattle, WA 98119	www.hollandamerica.com
INTERPAC YACHTS, INC.	4918 N. Harbor Drive; San Diego, CA 92106	www.interpacyachts.com
LINDBLAD EXPEDITIONS	96 Morton St, 9th floor; New York, NY 10014	www.expeditions.com
MSC CRUISES	250 Moonachie Road; Moonachie, NJ 07074	www.msccruises.com
NORWEGIAN CRUISE LINE	7665 Corporate Ctr.; Miami, FL 33126	www.ncl.com
OCEANIA CRUISES INC.	8300 Nw 33rd street, 308, Miami, FL 33122	www.oceaniacruises.com
POSEIDON CHARTERS	558 notre Dame, suite 203, St. Lambert, Quebec, J4P 2K7, CANADA	www.poseidoncharters.com
PRINCESS CRUISES	24305 Town Center Dr.; Santa Clarita, CA 91355	www.princess.com
RADISSON SEVEN SEAS	600 Corporate Dr.; Ft. Lauderdale, FL33334	www.rssc.com
REMOTE ODYSSEYS WORLDWIDE	P.O.Box 579; Coeur d'Alene, ID 83816	www.rowinternational.com
SEABOURN CRUISES	6100 Blue Laguna Drive, Miami, FL 33126	www.seabourn.com
SEACLOUD CRUISES	32-40 North Dean St.; Englewood, NJ 07631	www.seacloud.com
SILVERSEA CRUISES	110 E. Broward Blvd; Ft. Lauderdale, FL 33301	www.silversea.com
STERLING VACATIONS	5213 Doe Valle Lane; Austin, TX 78759	www.sterlingvacations.com
TAUCK WORLD DISCOVERY	10 Norden Place; Norwalk, CT 06855	www.tauck.com
TRAVEL DYNAMICS INTERNATIONAL	132 East 70th Street; New York, NY 10021	www.traveldynamicsinternational.com
UNIQUE WORLD CRUISES	154 Village Road; Manhasset, NY 11030	www.uniqueworldcruises.com

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WINDSTAR CRUISES	300 Elliott Avenue W; Seattle, WA 98119	www.windstarcruises.com