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LASTING

PASSENGER MOBILITY IN THE LOWER ADRIATIC (PMLA)

INTERREG IPA CBC ITALY-ALBANIA-MONTENEGRO
2014-2020

Research Report



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RESEARCH

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Executive Summary

This report aims to offer a comprehensive analysis of passenger traffic flow in the lower Adriatic region, providing a focus on the connectivity between the main ports in Region: Bari (Italy), Bar (Montenegro) and Durres (Albania). The quantitative research is developed by using statistical analysis and it is supplemented by the design of a qualitative survey, which would allow identifying the passengers' reasons for travelling over the routes connecting the ports of Bari, Bar and Durres, and obtaining a description of the difficulties faced by passengers, and their expectations for the future.

The quantitative research is reported in Section 1 and Section 2. Specifically, Section 1 shows the results of the context analysis. The research examines the aggregated passenger traffic at Italian, Albanian and Montenegrin ports by considering the total number of passengers and its growth rate over a period of time of ten years, to shed some light on the general passenger traffic trend, with attention to the impact of COVID-19 pandemic. Moreover, the research, still considering the aggregated passenger traffic, place attention on passenger traffic flow between the ports of Bari/Brindisi and all the ports in Albania and Montenegro.

The results of the analysis carried out in Section 1 are necessary to better contextualize the results from the analysis shown in Section 2, which focuses on the specific passenger traffic flow on the routes connecting the ports of Bari, Durres and Bar. To this aim, Section 2 first provides an overview of the port infrastructures. Then, the research turns the attention to the analysis of the passenger traffic on the routes connecting the ports of Bari, Durres and Bar. Additionally, the air passenger traffic on the Tirana-Bari city pair is analysed to offer a comparison between two competing modal alternatives. Finally, Section 2 concludes with an analysis of the port-city-to-airport connectivity, to identify the main obstacles and difficulties in the connectivity between the port and the other transport facilities. The main results from the quantitative research are summarized by the following points:

- Bari port, and to some extent also Brindisi port, show a positive outlook in terms of total passenger traffic compared to the trend of the Italian ports overall considered; a positive rebound emerges after the COVID-19 lockdown that interrupted the passenger traffic internationally;
- the percentage share of passenger traffic at Bari port to/from ports of Albania appears to be remarkable and shows an increasing trend: starting from the third quarter of 2018, the share of passenger traffic is 60% and even more (except for the third quarter of 2020 in which the share of passenger traffic falls to about 44%);
- the passenger traffic from Albanian ports has constantly ranged above 1 million passengers since 2010, showing a robust and persistent increase up to the years 2020-2021 when the COVID-19 pandemic determined a significant decline in passenger traffic, that anyway seems to be reverted in 2022; in this generally positive framework, Durres outperforms other ports in the country;
- the Durres-Bari-Durres route shows a relatively stable and increasing trend in the period 2014-19 and a strong rebound after the COVID-19 pandemic;
- the Bar-Bari-Bar route instead is characterised by a weak passenger performance and is in line with the steady decline of the passenger traffic to/from Montenegro;
- the air passenger traffic trend of the Bari-Tirana city pair is in line with the passenger traffic trend on the Bari-Durres route; indeed, it shows a robust performance before and after the COVID-19 pandemic, with a substantial increase in the total number of passengers by 42% from 2017 (56.344 pax) to 2022 (79.905 pax);

- concerning connectivity, port and train stations are located near each other; however, the transit from the port to the train station with public transport facilities is not always direct and is not frequently available; on the other hand, there is always an available public transport transit to (from) the nearest international airport.

The qualitative research, reported in Section 3, provides the design of a survey questionnaire that collects information on three main dimensions of travelling passengers: 1) the socio-economic characteristics of the passengers; 2) the travel information (among the others, the ferry company, the travel motivation, the ticket price and purchase methods, the travel frequency both before and after the COVID-19 pandemic); the difficulties experienced by passengers and their expectations for the future (among the others, the means of transport used to reach the port and the time taken to reach the port of call and the factors that might represent a difficulty for the journey). The qualitative survey, enclosed in this research in four languages, can be administered to passengers through direct interviews both at the ports and at the airports.



I. Context analysis: the passenger traffic at Italian, Albanian and Montenegrin ports

Introduction

The present section provides an analysis of the total passenger traffic at Italian, Albanian and Montenegrin ports by considering the total number of passengers and its growth rate over a period of time of around ten years, to shed some light on the general passenger traffic trend, with attention to the impact of COVID-19 pandemic.

Firstly, the analysis considers the aggregated passenger traffic at Italian ports; then, still considering the aggregated passenger traffic, the attention is placed on passenger traffic flow between the ports of Bari/Brindisi and all the ports in Albania and Montenegro. Secondly, the section analyses the total passenger traffic flow at the four Albanian ports (Durrës, Vlora, Saranda and Shengjini) and concludes with the analysis of passenger traffic in Montenegro.

The results of the analysis carried out in this section are needed to better contextualize the results from the analysis shown in the following section, which focuses on the specific passenger traffic flow on the routes connecting the ports of Bari, Durrës and Bar.

I.1 Passenger traffic at Italian ports

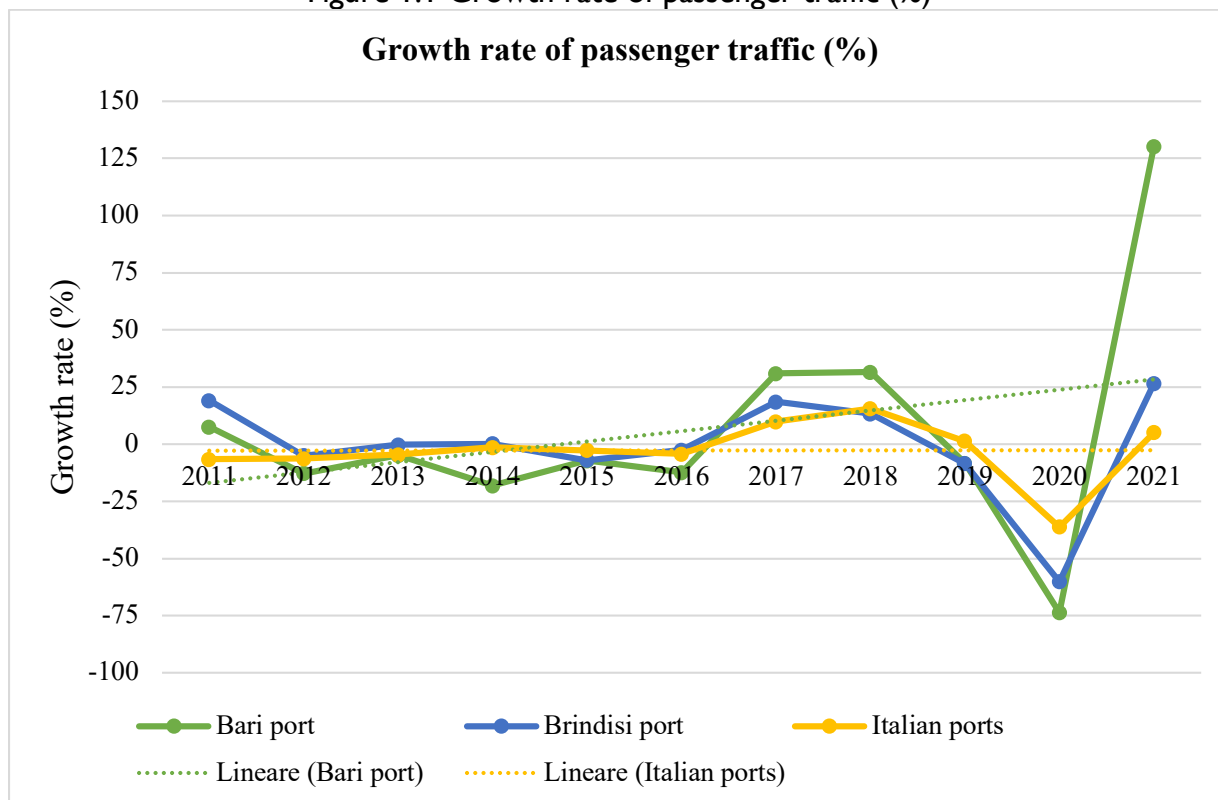
Table I.1 shows passenger traffic, in terms of number and growth rate, at all Italian ports, over the period 2010-2021. Special attention is also devoted to total passenger traffic at Bari and Brindisi ports. Figure I.1 graphically displays the growth rate of passenger traffic to highlight the trend during the period considered.

Table I.1 Passenger traffic (embarked/disembarked).

	Bari port		Brindisi port		Italian ports	
	Passengers (thousands)	Growth rate (%)	Passengers (thousands)	Growth rate (%)	Passengers (thousands)	Growth rate (%)
2010	1,486		413		87,658	
2011	1,597	7.47	492	19.13	81,895	-6.57
2012	1,393	-12.77	467	-5.08	76,735	-6.3
2013	1,324	-4.95	466	-0.21	73,238	-4.56
2014	1,083	-18.2	467	0.21	72,225	-1.38
2015	1,005	-7.2	434	-7.07	70,268	-2.71
2016	881	-12.34	423	-2.53	67,273	-4.26
2017	1,153	30.87	501	18.44	73,876	9.82
2018	1,517	31.57	568	13.37	85,382	15.57
2019	1,390	-8.37	520	-8.45	86,530	1.34
2020	366	-73.67	207	-60.19	55,147	-36.27
2021	843	130.33	262	26.57	57,916	5.02

Source: Elaborations on EUROSTAT data.

Figure I.1 Growth rate of passenger traffic (%)

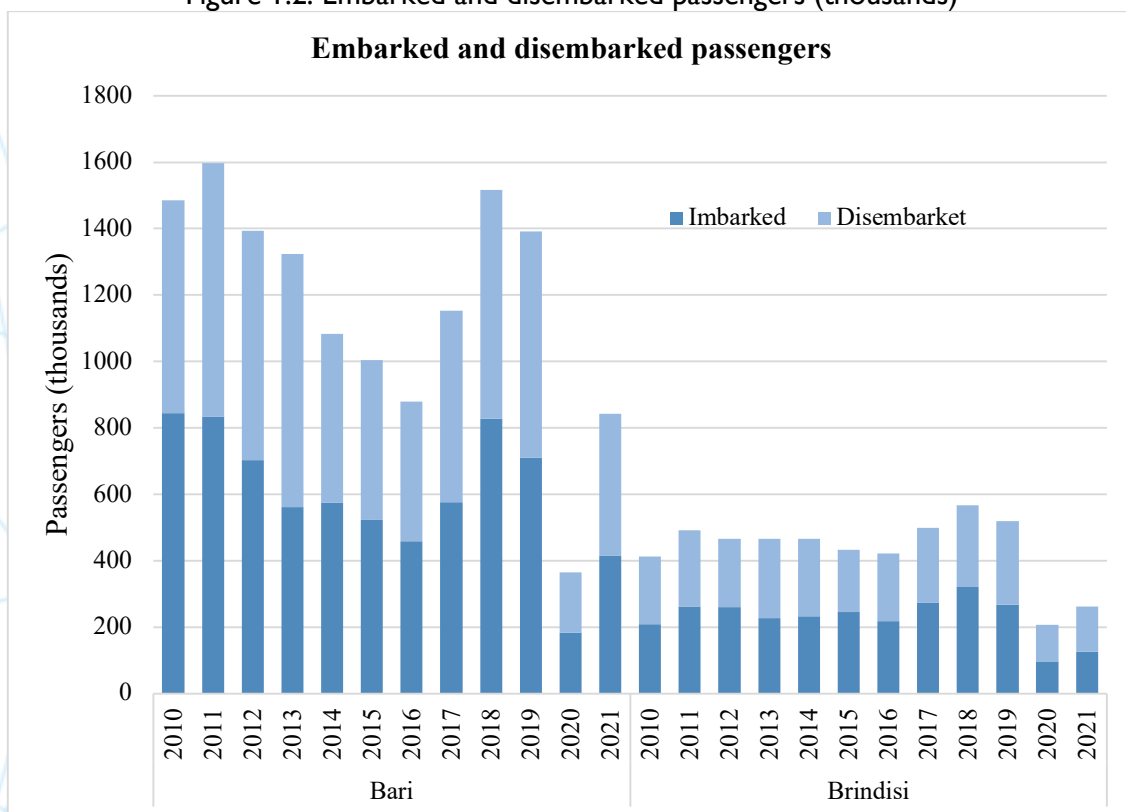


Source: Elaborations on EUROSTAT data

First, after a year of growth in 2011, the passenger traffic at Bari and Brindisi ports steadily decreases over the period 2012-2016. Particularly, the greatest reduction in passenger traffic at Bari port occurs in 2014 (-18.2%), while at Brindisi port occurs in 2015 (-7%). Overall, Bari port experiences a more marked decrease in passenger traffic as compared to Brindisi ports and all the other Italian ports. During the following years 2017-2018, passenger traffic at Bari port is characterised by a substantial growth of about 31% for both years. Such an increase also concerns, to a lesser extent, the Brindisi port, about 18% in 2017 and 13% in 2018. Instead, 2019 is characterised again by a reduction in passenger traffic at both ports of about 8%, in contrast with the other Italian ports that experience a limited increase of 1%. The negative trend extends to 2020 because the COVID-19 pandemic has determined a huge reduction in passenger traffic at Bari and Brindisi ports of about 74% and 60%, respectively. Such a negative situation also concerns, but to a lesser extent, the Italian ports that, overall, are characterised by a reduction of 36% in passenger traffic. Instead, 2021 shows signs of recovery as the passenger traffic, although lower than in previous years, remarkably increases at Bari and Brindisi ports by 130% and 26%, respectively, while the Italian ports show an increment of only 5%.

Figure I.2 portrays passenger traffic by taking into account the distinction between embarked and disembarked passengers at Bari and Brindisi ports.

Figure I.2. Embarked and disembarked passengers (thousands)



Source: Elaborations on EUROSTAT data

Table 1.2 shows quarterly data on passenger traffic at Bari and Brindisi ports to/from ports of Albania and Montenegro over the period 2010-2021.

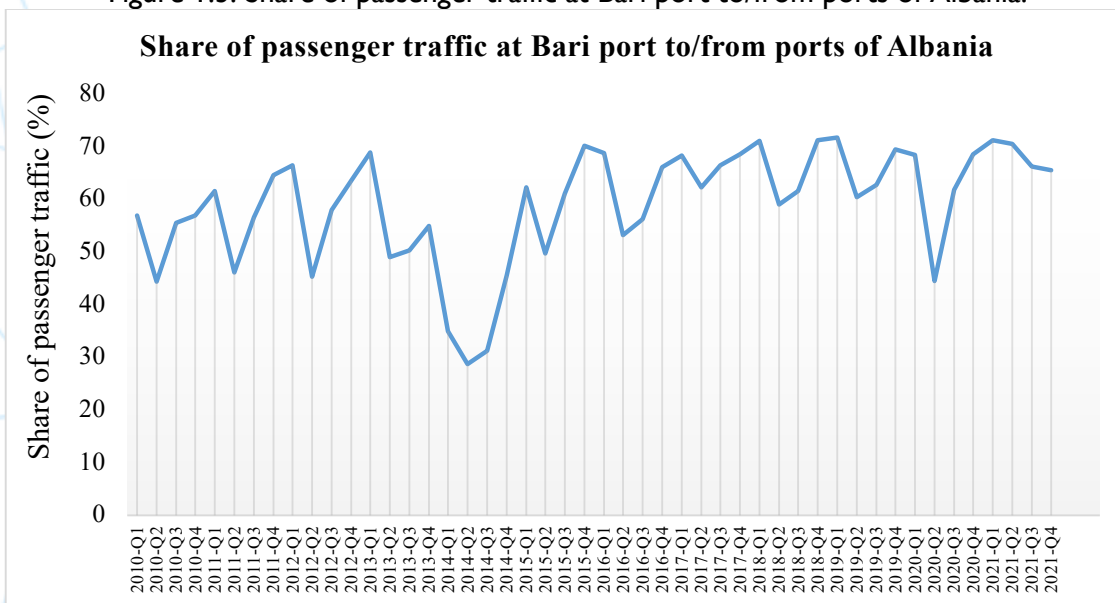
Table 1.2. Passenger traffic at Bari port and Brindisi port to/from ports of Albania and Montenegro.

	Passenger traffic at Bari port					Passenger traffic at Brindisi port		
	Total	(thousands) Montenegro	Albania	(share%) Montenegro	Albania	(thousands) Total	(share%) Albania	Albania
2010-Q1	197	7	112	3.55	56.85	48	24	50.00
2010-Q2	232	10	103	4.31	44.40	51	18	35.29
2010-Q3	637	33	354	5.18	55.57	258	61	23.64
2010-Q4	209	4	119	1.91	56.94	30	14	46.67
2011-Q1	213	5	131	2.35	61.50	73	28	38.36
2011-Q2	256	8	118	3.13	46.09	82	17	20.73
2011-Q3	603	28	341	4.64	56.55	267	76	28.46
2011-Q4	223	6	144	2.69	64.57	71	34	47.89
2012-Q1	125	3	83	2.40	66.40	40	24	60.00
2012-Q2	247	9	112	3.64	45.34	75	25	33.33
2012-Q3	595	26	345	4.37	57.98	262	79	30.15
2012-Q4	170	5	108	2.94	63.53	91	34	37.36
2013-Q1	138	5	95	3.62	68.84	70	25	35.71
2013-Q2	204	8	100	3.92	49.02	96	29	30.21
2013-Q3	507	24	255	4.73	50.30	211	96	45.50
2013-Q4	142	4	78	2.82	54.93	88	37	42.05
2014-Q1	146	4	51	2.74	34.93	106	47	44.34
2014-Q2	202	8	58	3.96	28.71	92	34	36.96
2014-Q3	452	25	141	5.53	31.19	184	71	38.59
2014-Q4	200	3	91	1.50	45.50	85	37	43.53
2015-Q1	114	4	71	3.51	62.28	64	22	34.38
2015-Q2	173	7	86	4.05	49.71	89	29	32.58
2015-Q3	522	22	319	4.21	61.11	187	105	56.15
2015-Q4	154	3	108	1.95	70.13	89	38	42.70
2016-Q1	125	4	86	3.20	68.80	52	24	46.15
2016-Q2	156	4	83	2.56	53.21	55	28	50.91
2016-Q3	402	24	226	5.97	56.22	225	88	39.11
2016-Q4	121	2	80	1.65	66.12	91	30	32.97
2017-Q1	120	n.a.	82	n.a.	68.33	80	29	36.25
2017-Q2	172	n.a.	107	n.a.	62.21	93	26	27.96
2017-Q3	500	n.a.	332	n.a.	66.40	219	85	38.81
2017-Q4	159	n.a.	109	n.a.	68.55	78	27	34.62
2018-Q1	152	n.a.	108	n.a.	71.05	60	20	33.33
2018-Q2	222	n.a.	131	n.a.	59.01	102	32	31.37
2018-Q3	671	n.a.	413	n.a.	61.55	227	98	43.17
2018-Q4	184	n.a.	131	n.a.	71.20	103	33	32.04
2019-Q1	152	n.a.	109	n.a.	71.71	81	25	30.86
2019-Q2	212	2	128	0.94	60.38	96	28	29.17
2019-Q3	670	15	420	2.24	62.69	251	81	32.27
2019-Q4	193	2	134	1.04	69.43	77	23	29.87
2020-Q1	98	n.a.	67	n.a.	68.37	40	n.a.	n.a.
2020-Q2	27	0	12	0.00	44.44	45	5	11.11
2020-Q3	165	1	102	0.61	61.82	81	22	27.16
2020-Q4	73	n.a.	50	n.a.	68.49	40	0	0.00
2021-Q1	139	n.a.	99	n.a.	71.22	84	10	11.90
2021-Q2	200	1	141	0.50	70.50	94	8	8.51
2021-Q3	880	9	583	1.02	66.25	246	62	25.20
2021-Q4	238	1	156	0.42	65.55	98	18	18.37

Source: EUROSTAT (number of passengers excludes cruise passengers).
Data on passenger traffic at Brindisi port to/from Montenegro are not available.

Figures I.3 to I.5 graphically display the percentage share of passenger traffic at Bari and Brindisi ports to/from ports of Albania and Montenegro over the total passenger traffic (all ports).

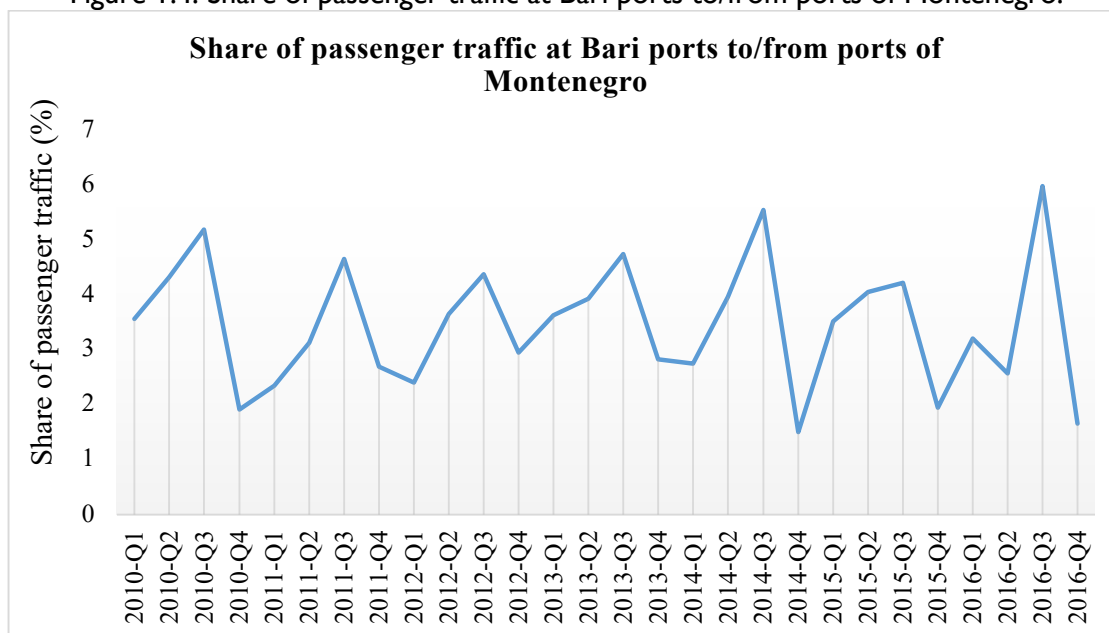
Figure I.3. Share of passenger traffic at Bari port to/from ports of Albania.



Source: Elaborations on EUROSTAT data

The percentage share of passenger traffic at Bari port to/from ports of Albania appears to be remarkable over the period considered. In more detail, the lowest share occurs in the fourth quarter of 2014 (about 1.5%), while the highest share occurs in the first quarter of 2019 (about 72%). It is worth noting that the share of passenger traffic at Bari port to/from ports of Albania shows an increasing trend. Specifically, starting from the third quarter of 2018, the share of passenger traffic is 60% and even more, except for the third quarter of 2020 in which the share of passenger traffic falls to about 44%.

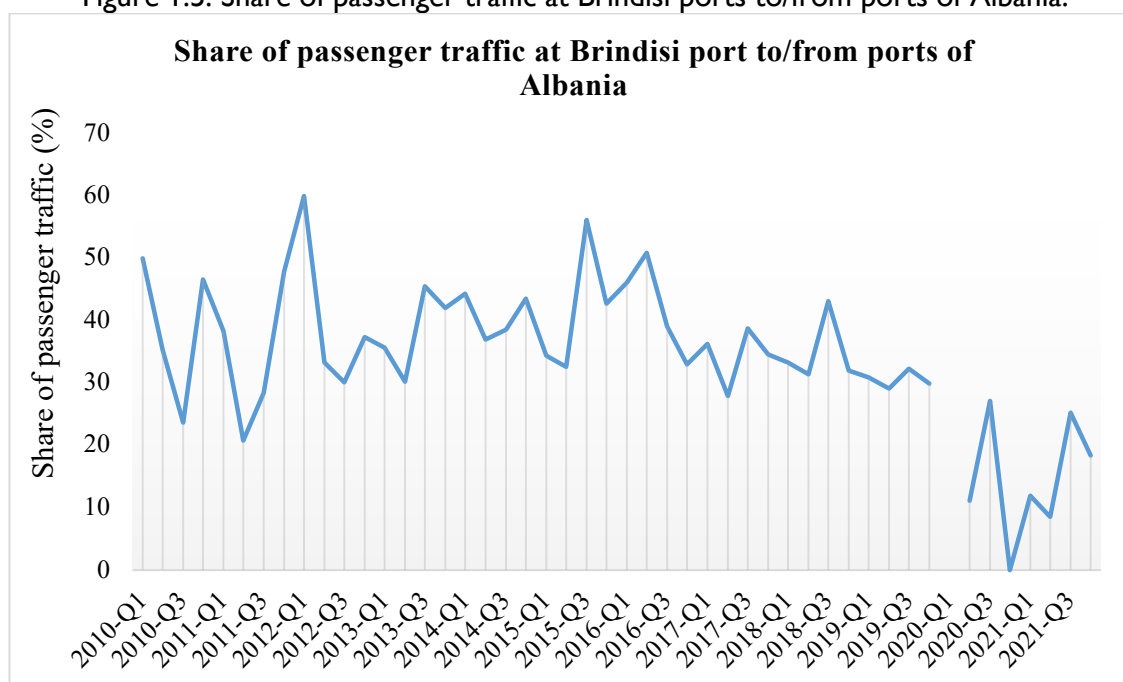
Figure I.4. Share of passenger traffic at Bari ports to/from ports of Montenegro.



Source: Elaborations on EUROSTAT data

Figure 1.4 focuses on the period 2010-2016 because the following data on passenger traffic to/from ports of Montenegro are not available. Differently from passenger traffic to/from ports of Albania, the percentage share of passenger traffic at Bari port to/from ports of Montenegro appears to be limited. In more detail, the lowest share occurs in the third quarter of 2014 (about 31%), while the highest share occurs in the third quarter of 2016 (about 6%). It is worth noting that the share of passenger traffic at Bari port to/from ports of Montenegro is remarkably seasonal, with peaks occurring typically in the third quarter of each year.

Figure 1.5. Share of passenger traffic at Brindisi ports to/from ports of Albania.



Source: Elaborations on EUROSTAT data

Similarly, to Bari port, the share of passenger traffic at Brindisi port to/from ports of Albania is notable over the period 2010-2021 (see Figure 1.5). In more detail, the lowest share occurs in the first quarter of 2021 (0%), while the highest share occurs in the first quarter of 2012 (about 60%). Differently from Bari port, the share of passenger traffic at Brindisi port to/from ports of Albania shows a decreasing trend, which seems to start from the third quarter of 2015 and steadily continues to the last available year.

I.2. Passenger traffic at Albanian ports

Table I.3 shows passenger traffic, in terms of number and growth rate, from the four Albanian ports (Durrës, Vlora, Saranda and Shengjini) over the period 2010-2021. The total passenger traffic is reported also for the entire passenger traffic in Albania. Moreover, Figure I.6 graphically displays the growth rate of passenger traffic to highlight the trend during the period considered.

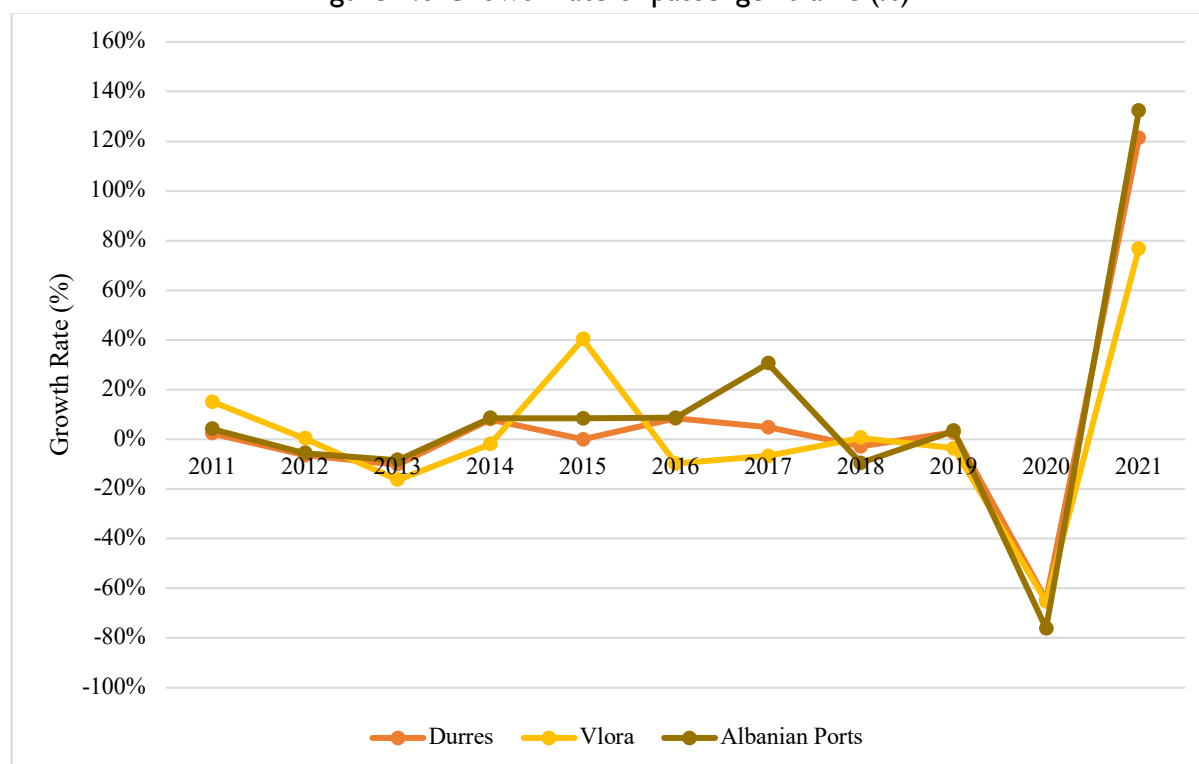
Figure I.6 also shows the relative weight of the four main ports in Albania.

Table I.3 Passenger traffic (embarked/disembarked) at Albanian ports.

	Durrës port		Vlora port		Saranda port		Shengjini port		Albanian Ports	
	Passengers	Growth Rate	Passengers	Growth Rate	Passengers	Growth Rate	Passengers	Growth Rate	Passengers	Growth Rate
2010	834,040		165,227		116,069		4,467		1,119,803	
2011	853,748	2%	190,228	15%	121,793	5%	..		1,165,993	4%
2012	798,524	-6%	190,82	0%	111,681	-8%	..		1,100,880	-6%
2013	717,399	-10%	159,625	-16%	132,162	18%	..		1,009,104	-8%
2014	774,681	8%	156,407	-2%	163,481	24%	..		1,094,865	8%
2015	774,411	0%	219,429	40%	192,114	18%	..		1,186,531	8%
2016	839,598	8%	198,079	-10%	251,311	31%	..		1,289,283	9%
2017	879,905	5%	184,917	-7%	442,119	76%	175		1,682,681	31%
2018	854,637	-3%	186,043	1%	482,216	9%	..		1,522,964	-9%
2019	878,687	3%	179,22	-4%	516,188	7%	..		1,574,156	3%
2020	311,302	-65%	62,193	-65%	5,589	-99%	..		376,796	-76%
2021	688,586	121%	109,969	77%	64,202	1049%	..		875,224	132%

Source: Elaborations on Port Authority data

Figure I.6 Growth rate of passenger traffic (%)



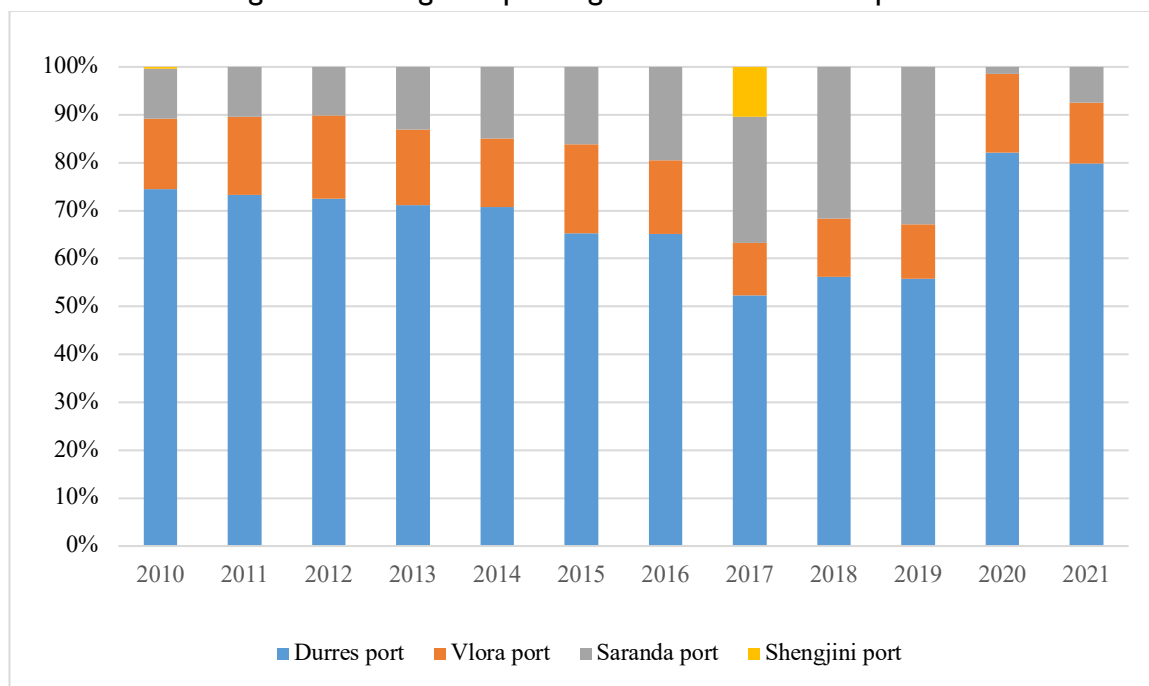
Source: Elaborations on Port Authority data

The above table and figure show that the passenger traffic from Albanian ports has constantly ranged above 1 million passengers since 2010, with significant upward fluctuations between 2014 and 2017. After that the 2018 financial crisis has determined a significant decline in terms of volume of passengers, that remained in the period 2018-2019 above the level reached between 2010 and 2016, showing a robust and persistent increase in compared to historical trends.

However, this situation changed dramatically in 2020 and in 2021 when the COVID pandemic and its aftermath determined a significant decline in passenger traffic, that anyway seems to be reverted in 2022.

When we turn our attention to the relevance of the Albanian ports in terms of passenger traffic it is apparent how Durres represents the main passenger port in the country followed by Vlora and Saranda (see Figure 1.7).

Figure 1.7 Weight of passenger traffic at Albanian ports



Source: Elaborations on Port Authority data

Durres constantly hosts around 800 thousand passengers each year with relatively stable traffic over time and it represents around 75 percent of the passenger traffic in Albania.

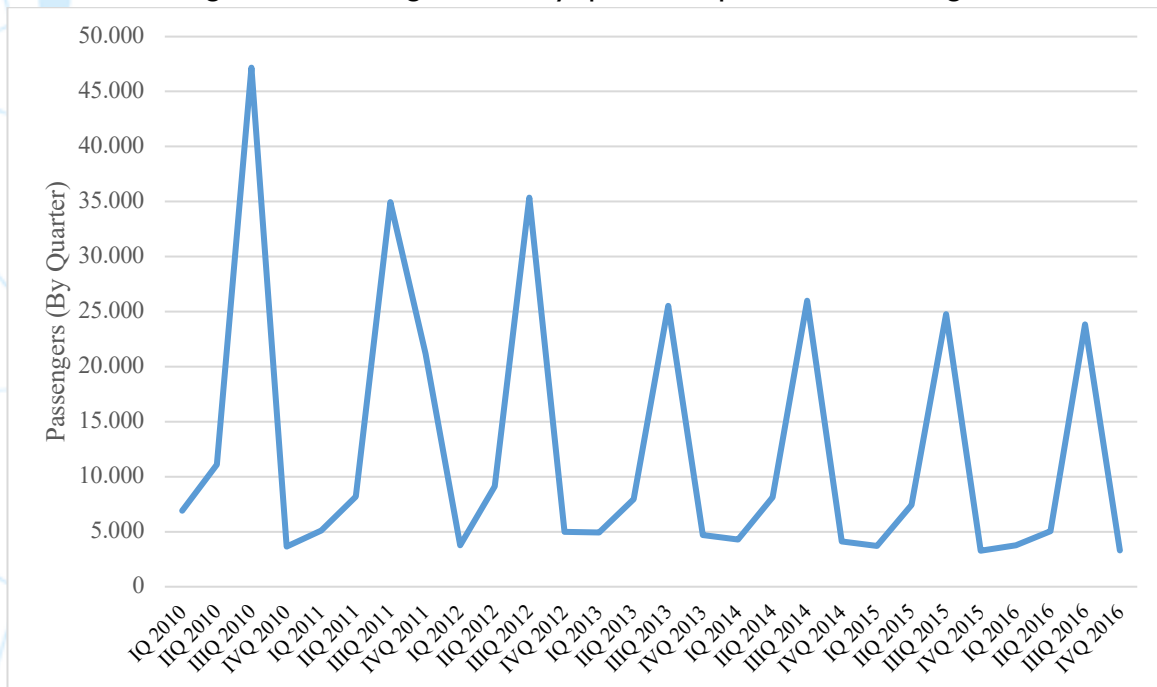
However, in this stable picture, with the well-known fluctuation relative to the COVID and post-COVID crisis, an interesting dynamic is affecting the relative relevance of other ports in Albania. Saranda port, while being constantly outperformed by Vlora in the period 2010-5 has regularly increased its traffic overtaking Vlora from 2016 and showing a very dynamic performance over time.

This is linked to the increase in tourism in the Saranda region which has heavily suffered the COVID-19 crisis but nonetheless represents a significant trend in the Albanian port scenario.

1.3. Passenger traffic at Montenegrin ports

The passenger traffic in Montenegro, while limited to the period 2010-2016, shows the well-known seasonality with peak passenger traffic in the third quarter confirming the touristic inclination of Montenegro destinations, with traffic in the third quarter representing 60% of the annual traffic.

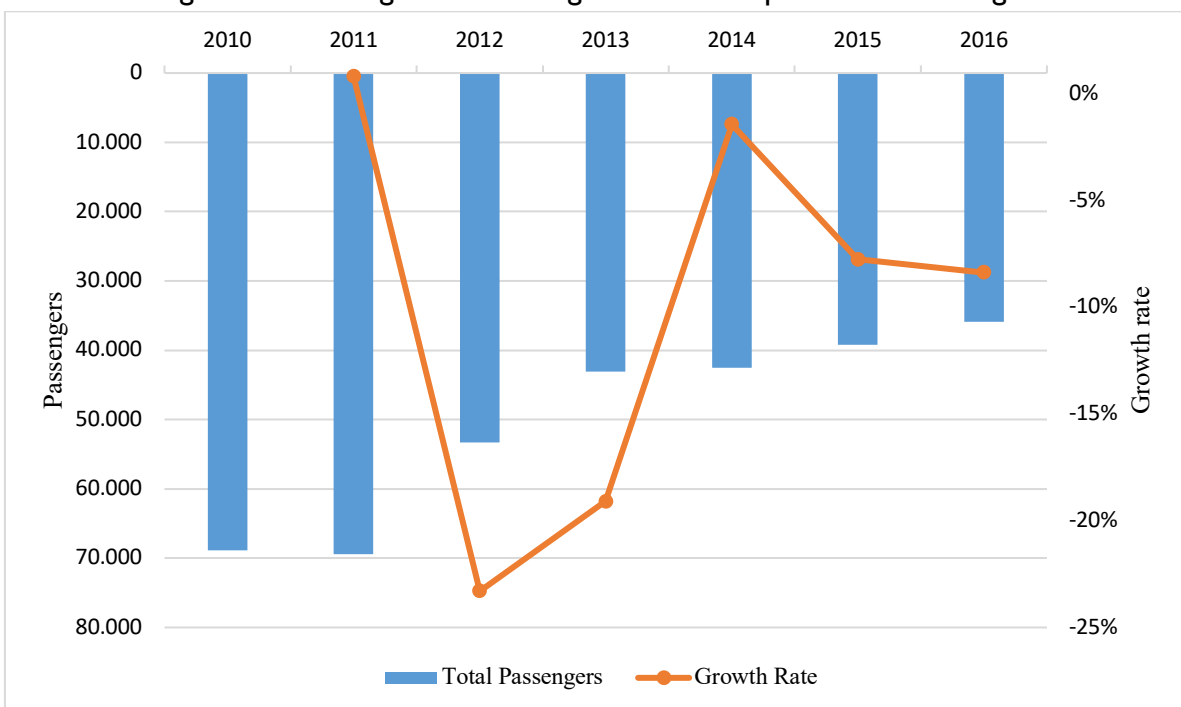
Figure 1.8 Passenger traffic by quarter at ports of Montenegro



Source: Elaborations on Statistical Office of Montenegro

If we look at the annual growth rate in the period considered we can identify a clear declining trend starting after 2011, which is confirmed both in the summer period (third quarter) as well as in the remaining periods. This negative trend has stabilised the passenger traffic below the threshold of 40000 passengers per year, almost halving the level registered in 2010.

Figure 1.9 Passenger traffic and growth rate at ports of Montenegro



Source: Elaborations on Statistical Office of Montenegro

2. Passenger traffic flows on the routes connecting the ports of Bari, Durres and Bar

Introduction

As mentioned before, the analysis carried out in the previous section considers the total passenger traffic at Italian, Albanian and Montenegrin ports. Instead, the present section focuses the analysis on the routes connecting the ports of Bari, Durres and Bar, to provide a more detailed knowledge of the passenger traffic flow.

To this aim, this section starts by providing an overview of the infrastructures of Bari, Durres and Bar ports. Then, it analyses the passenger traffic, in terms of the number of passengers and its growth rate, on the Bari-Durres-Bar routes.

Additionally, the air passenger traffic on the Tirana-Bari city-pair is analysed to offer a comparison between two competing modal alternatives. Finally, Section 2 concludes with an analysis of the port-city-to-airport connectivity, to identify the main obstacles and difficulties in the connectivity between the port and the other transport facilities.

2.1. Characteristics of the port infrastructures

Figure 2.1 and Figure 2.2 provide the overview, respectively, of the quays at the Bari Port and the Brindisi Port with information on their length, depth and use

Figure 2.1. Quays at the Bari Port.

Nome	Numero	Lunghezza (mt)	Profondità (m)	Utilizzazione prevista
Molo San Vito	1	95	5,00	
	2	120	6,00	
	3	165	7,00	Ormezzo traghetti con destinazione extra Schengen
	4	85	6,00	
Banchina Dogana	4a	86	4,50	Ormezzo traghetti con destinazione extra Schengen
	4b	100	4,50	
Banchina Capitaneria	5	70	4,50	Ormezzo traghetti con destinazione extra Schengen
	6	230	7,00	
Molo di S. Maria	7	75	5,50	
	8-9	380	6,00	Meca nautica, rimorchiatori, ormeggiatori, Vigili del Fuoco
Cassa di Piombo	10	245	11,50	Ormezzo traghetti con destinazione Schengen e navi da crociera
	11	300	11,50	
Molo di S. Maria	12	290	9,00	Ormezzo traghetti con destinazione Schengen e navi da crociera
	12a	60	9,00	
Banchina Deposito Petroli	13-14	297	9,00	Ormezzo navi da crociera
Banchina Veleggiatori	15	110	9,00	Ormezzo navi da carico
Banchina di Livorno	16	130	9,00	
Molo Fossile	17	180	11,00	Ormezzo navi da carico
	18	170	11,00	
Il Donicco Nuovo Molo Fossile	19a	110	9,00	
	19b			
	20	100	9,00	Ormezzo navi da carico
Molo Fossile	21	125	12,00	
	22	100	12,00	
	23	85	12,00	

Source: Port Authority's website

Figure 2.2. Quays at the Brindisi Port.

QUAY FACTS						
CODE	NAME	STATUS	DEPTH	LENGTH	WIDTH	USE
01	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
02	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
03	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
04	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
05	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
06	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
07	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
08	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
09	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
10	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
11	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
12	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
13	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
14	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
15	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
16	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
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90	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
91	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
92	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
93	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
94	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
95	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
96	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
97	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
98	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
99	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)
100	BERGAMO (MARELLI)	USE (MARELLI)	10.00	170	10	USE (MARELLI)



Moreover, Table 2.1 provides information on the quays at the Durres Port.

Table 2.1. Quays at the Durres Port.

Terminal	Quay length	Quay depth	Terminal building	Yard surface	Storage capacity	Handling capacity	Rails	Lines
Ferry	500 ml	8.5-10.00 m	5.400 m2			1.5 million psg/year		Durres-Ancona Durres-Bari
Container	265 ml	8.6-10.00 m		60.062 m2	3.000 TEU	180.000 TEU/year		MSC (Gioia Tauro) CMA CGM (Valleta) Maersk (Valleta) Cosco (Piraeus) Hapagloyd (Piraeus) Zim (Piraeus)
General cargo west	800 ml	7.00-8.2 m		92.680 m2		1.500.000 tons/year		
Bulk cargo east	422 ml	6.5-11.5 m		135.000 m2		1.8 million tons	1.000 ml	

Source: Durres Port Authority (<https://www.durresport.al/index.php/en/berths-terminals/>)

Finally, Figure 2.3 reports an overview of the quays at the Bar Port.

Figure 2.3. Quays at the Bar Port.

OPERATIONAL QUAY	BERTHS	DRAFT (m)	LENGTH (m)
Pier 1, south quay	1.1	11.5	165
Pier 1, south quay	1.2	11.5	165
Pier 1, north quay	1.3	11.0	165
Pier 1, north quay	1.4	11.0	165
Pier 2, south quay	2.1	11.0	155
Pier 2, south quay	2.2	11.0	155
Pier 2, west quay	2.3	10.5	150
Pier 2, north quay	2.4	11.0	140
Pier 2, north quay	2.5	10.5	140

Source: Port Authority's website

2.2. Analysis of passenger traffic on Bari-Durres-Bar routes

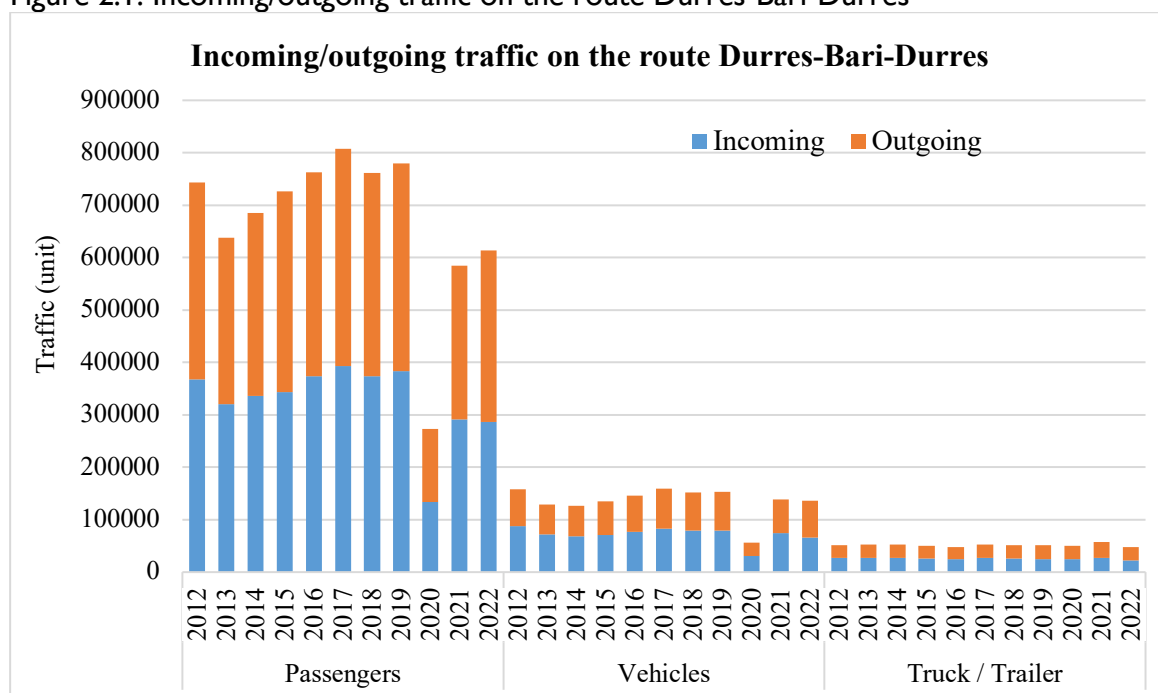
Table 2.2 reports traffic data, in terms of passengers, vehicles and ferries on the route Durres-Bari-Durres over the period 2012-2022. Moreover, Figure 2.1 portrays traffic by taking into account the distinction between incoming and outgoing traffic on the observed route.

Table 2.2. Traffic on the route Durres-Bari-Durres

	Incoming			Outgoing			Total			
	Passengers	Vehicles	Trucks/Trailers	Passengers	Vehicles	Trucks/Trailers	Passengers	Vehicles	Trucks/Trailers	Ferries
2012	367074	87319	26696	376330	70199	24515	743404	157518	51211	1086
2013	320709	72574	27208	317022	56185	25084	637731	128759	52292	914
2014	336011	68285	26821	349285	58522	25189	685296	126807	52010	943
2015	343665	70910	25672	382277	64499	24569	725942	135409	50241	943
2016	373997	76738	24322	388793	69513	23589	762790	146251	47911	807
2017	393041	82887	27244	414063	76138	25917	807104	159025	53161	836
2018	373804	79395	25754	387687	72645	25605	761491	152040	51359	822
2019	383217	79473	25223	396397	73875	25808	779614	153348	51031	814
2020	133636	30466	24774	138974	26255	25642	272610	56721	50416	649
2021	290925	73912	27429	293549	64917	29474	584474	138829	56903	825
2022*	286577	65837	22815	327534	69972	25152	614111	135809	47967	684

Source: Durres Port Authority (*note: ten months for 2022)

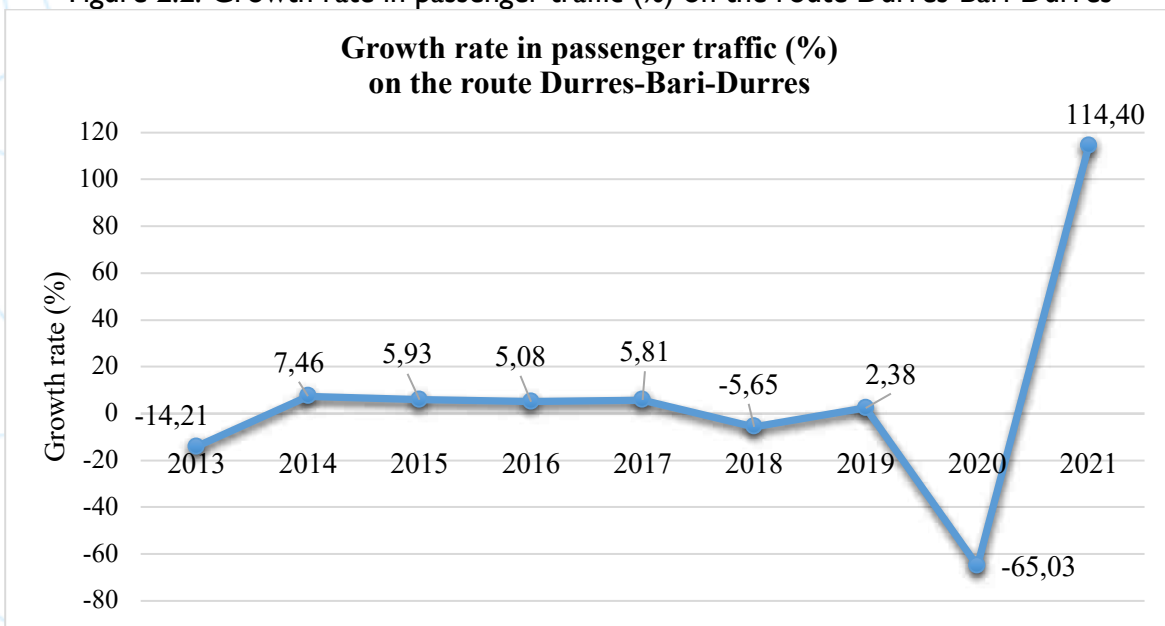
Figure 2.1. Incoming/outgoing traffic on the route Durres-Bari-Durres



Source: Elaborations on Durres Port Authority data

Moreover, Figures 2.2 to 2.5 graphically display the growth rate of traffic (passengers, vehicles and trucks/trails and ferries, respectively) to highlight the trend during the period considered.

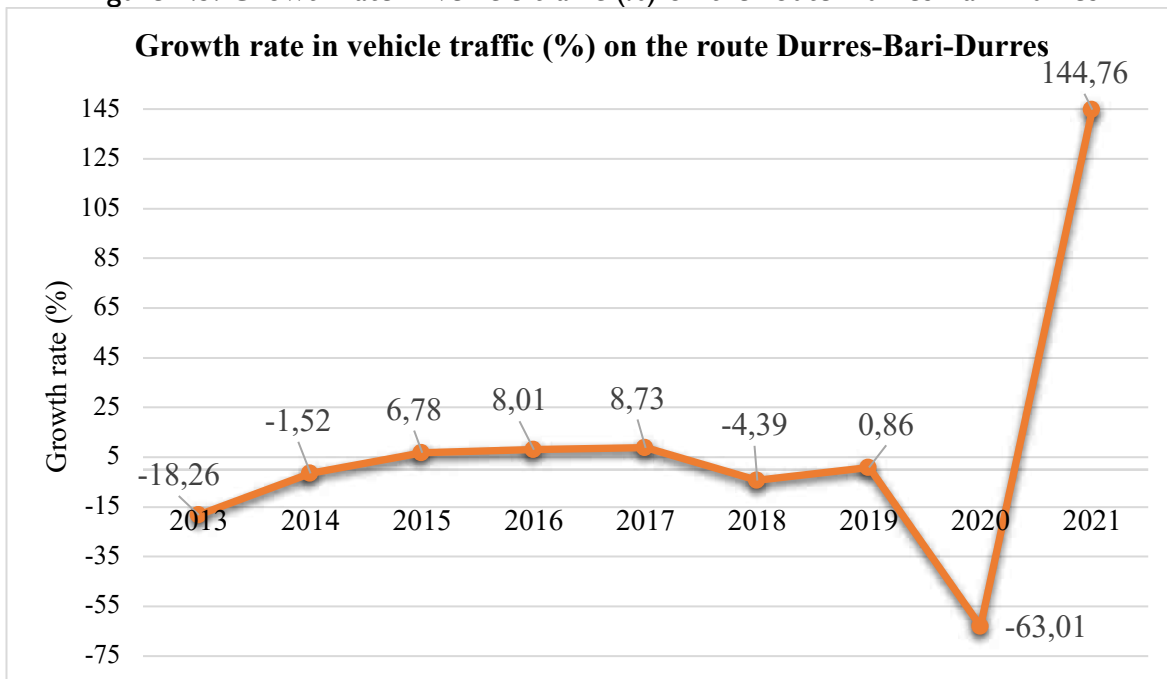
Figure 2.2. Growth rate in passenger traffic (%) on the route Durres-Bari-Durres



Source: Elaborations on Durres Port Authority data

The years 2014-2017 are characterised by a steady increase in passenger traffic, from 5 to 7.5%. Instead, in 2018 passenger traffic decreases by 5.6%, while in 2019 passenger traffic again increases but to a lesser extent (2.4%), as compared to previous years. Due to the COVID-19 pandemic, in 2020 passenger traffic substantially drops by 65%. Nevertheless, in 2021 passenger traffic more than doubled, thus showing signs of recovery.

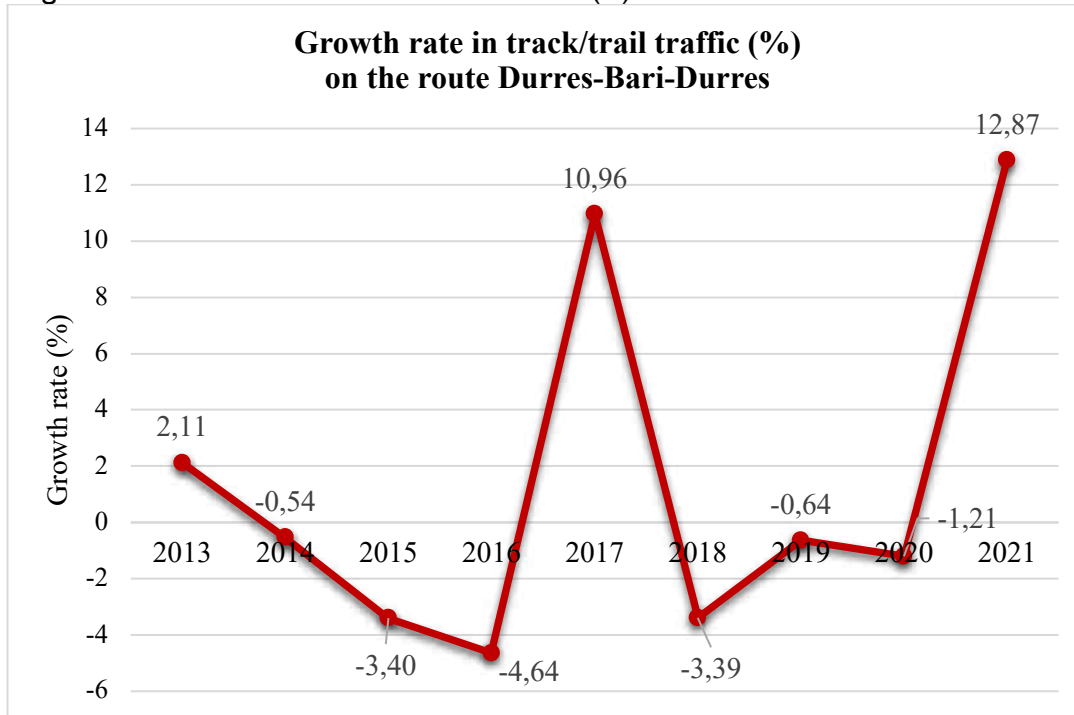
Figure 2.3. Growth rate in vehicle traffic (%) on the route Durres-Bari-Durres



Source: Elaborations on Durres Port Authority data

The growth rate in vehicle traffic almost mirrors the growth rate in passenger traffic. The years 2015-2017 are characterised by a steady increase in vehicle traffic, from 6.7 to 8.7%. Instead, in 2018 vehicle traffic decreases by 4.4%, while in 2019 vehicle traffic modestly increases by less than 1%. Due to the COVID-19 pandemic, in 2020 vehicle traffic substantially drops by 63%. However, in 2021 vehicle traffic remarkably increases by 144%.

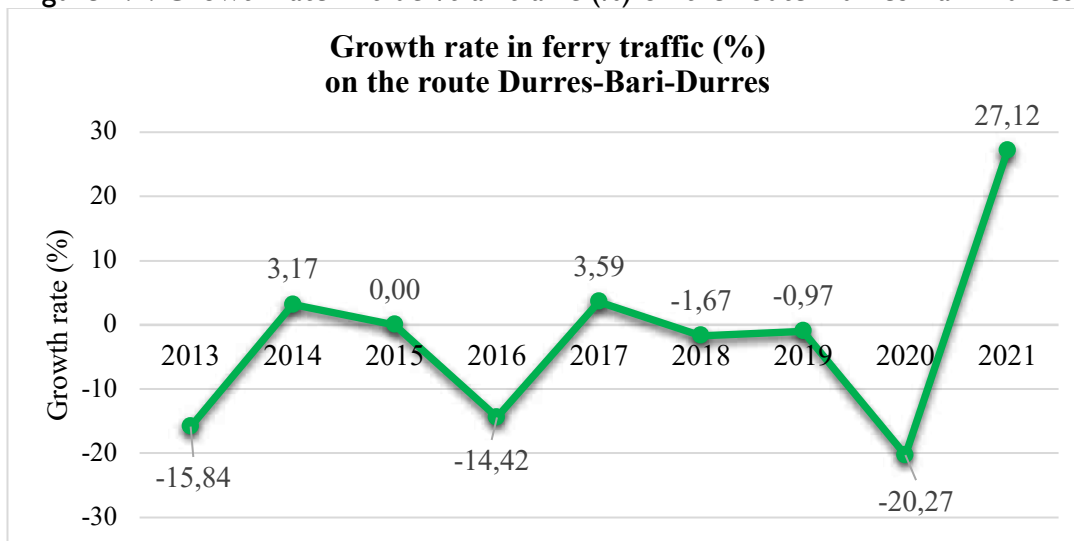
Figure 2.4. Growth rate in truck/trail traffic (%) on the route Durres-Bari-Durres



Source: Elaborations on Durres Port Authority data

The years 2013-2021 are, generally, characterised by a decrease in truck/trail traffic, except for a few years that, instead are characterized by an increase, such as 2013 (+2.1), 2017 (+11%) and 2021 (-12.8%).

Figure 2.4. Growth rate in truck/trail traffic (%) on the route Durres-Bari-Durres



Source: Elaborations on Durres Port Authority data

The growth rate in ferry traffic is negative at the beginning (-15.8% in 2013) but modestly increases in the following two years. Instead, in 2016 ferry traffic decreases by 14.4%, while in 2017 ferry traffic again modestly increases by 3.6%. Over the year 2018-2020, ferry traffic again decreases, especially in 2020 in which, due to the COVID-19 pandemic, the traffic drops by 20%. However, in 2021 ferry traffic increased by 27%.

The passenger and vehicle traffic to Bar-Bari-Bar is also analysed below. This route is the only seaway connecting the low Adriatic ports in Italy with Montenegro and therefore represents the global traffic in the southwest direction from/to Montenegro. The data available are limited and refer to the period 2019-21 and are therefore heavily biased by the COVID-19 pandemic that has reduced to only 1901 passengers, 4% of the passenger traffic compared to pre-pandemic levels, while the vehicles traffic in 2020 stabilised at 10% suggesting that the route has been used in 2020 only for commercial reasons. In 2021 the traffic rebounded to 11528 in only 3 trimesters, showing an encouraging recovery at around 25% of the pandemic traffic.

Table 2.3. Traffic on the route Bar-Bari-Bar

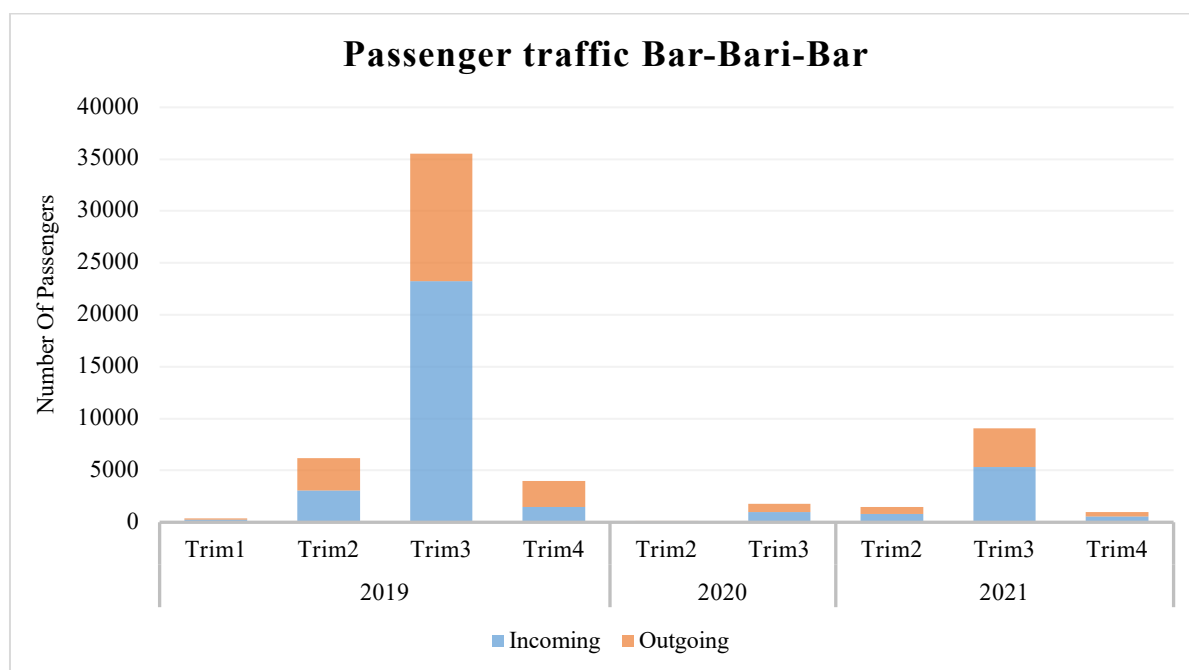
	Passengers		Vehicles		Total	
	Incoming	Outgoing	Incoming	Outgoing	Passengers	Vehicles
2019	28004	18049	5907	0	46053	5907
Quarter 1	226	135	19	0	361	19
Quarter 2	3077	3099	537	0	6176	537
Quarter 3	23256	12285	5109	0	35541	5109
Quarter 4	1445	2530	242	0	3975	242
2020	1066	835	292	284	1901	576
Quarter 2	75	50	25	20	125	45
Quarter 3	991	785	267	264	1776	531
2021	6669	4859	1905	1412	11528	3317
Quarter 2	778	682	234	232	1460	466
Quarter 3	5322	3733	1511	1086	9055	2597
Quarter 4	569	444	160	94	1013	254
Total	35739	23743	8104	1696	59482	9800

Source: Bari Port Authority

Figure 2.5 illustrates the well-known peak in the summer trimester (trim 3) that represents 80% of the annual traffic (in each year) with a prevalence of incoming passengers (directed to Bari).

While the limitation in the data availability prevents to identify general trends, the data provided seems to confirm a declining trend as described in section 1.3 (Passenger traffic at ports of Montenegro) that is now well below the 40,000 passengers (per single direction) recorded in the period 2010-2016 as in 2019, before the COVID-19 pandemic recorded only 28000 incoming passengers, representing 1 to 3% (peak/off-peak period) of the total traffic at Bari port during the year.

Figure 2.5. Incoming/outgoing passenger traffic on the route Bar-Bari-Bar



Source: Bari Port Authority

2.3. Analysis of the air traffic on the Tirana-Bari city-pair

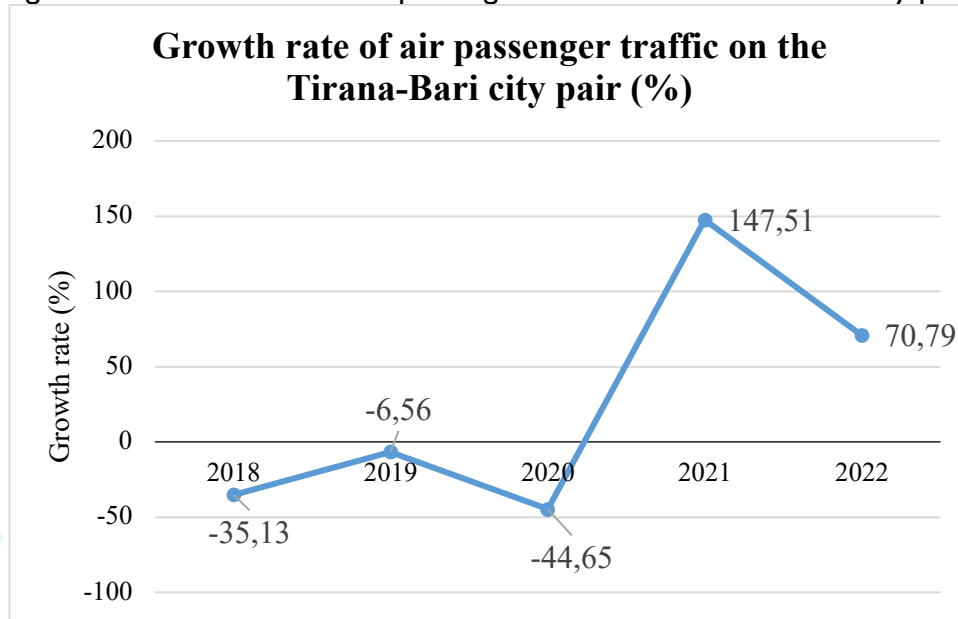
Along with the maritime connection between Bari Port and Durres Port, it is also available an air connection between the Bari Airport and the Tirana Airport. Therefore, it is also useful to analyze the volume and the growth of air passenger traffic to make a comparison between the two modal alternatives. Table 2.4 shows the size of air passenger traffic, while Figure 2.6 portrays the growth rate of air passenger traffic on the Tirana-Bari city-pair.

Table 2.4. Air passenger traffic on the competing routes.

Country	Origin/Destination	Airport	YEAR						Total
			2017	2018	2019	2020	2021	2022*	
Albania	Tirana	Brindisi	435	1.167	78	122			1.802
		Bari	56.344	36.552	34.153	18.902	46.785	79.905	272.641
	Total		56.779	37.719	34.231	19.024	46.785	79.905	274.443
Montenegro	Tivat	TIV BRI	3.084						3.084
	Total		3.084						3.084
Total			59.863	37.719	34.231	19.024	46.785	79.905	277.527

Source: Airport data (*note: January-august for 2022).

Figure 2.6. Growth rate of air passenger traffic on the Tirana-Bari city pair.



Source: Elaborations on Airport data.

As emerges from the figure above, the growth rate of the air passenger traffic on the Tirana-Bari city-pair is negative for the period 2018-2020. Particularly, in 2020 air passenger traffic reduces by 44.65% compared to the previous year. However, a notable increase of 147,5% occurs in 2021. This positive trend seems to be confirmed for 2022 (+70.8%) whose data, it is important to note, refers only to 8 months (January-August), thus the actual increase between 2021 and 2022 is likely to be much greater.

2.4. Analysis of the port-city (railway) to airport connectivity

One of the objectives of this research is to identify the main obstacles and difficulties in the connectivity between the port and the other transport facilities including the connectivity with the nearest railways and airport in the three target ports analysed in this report.

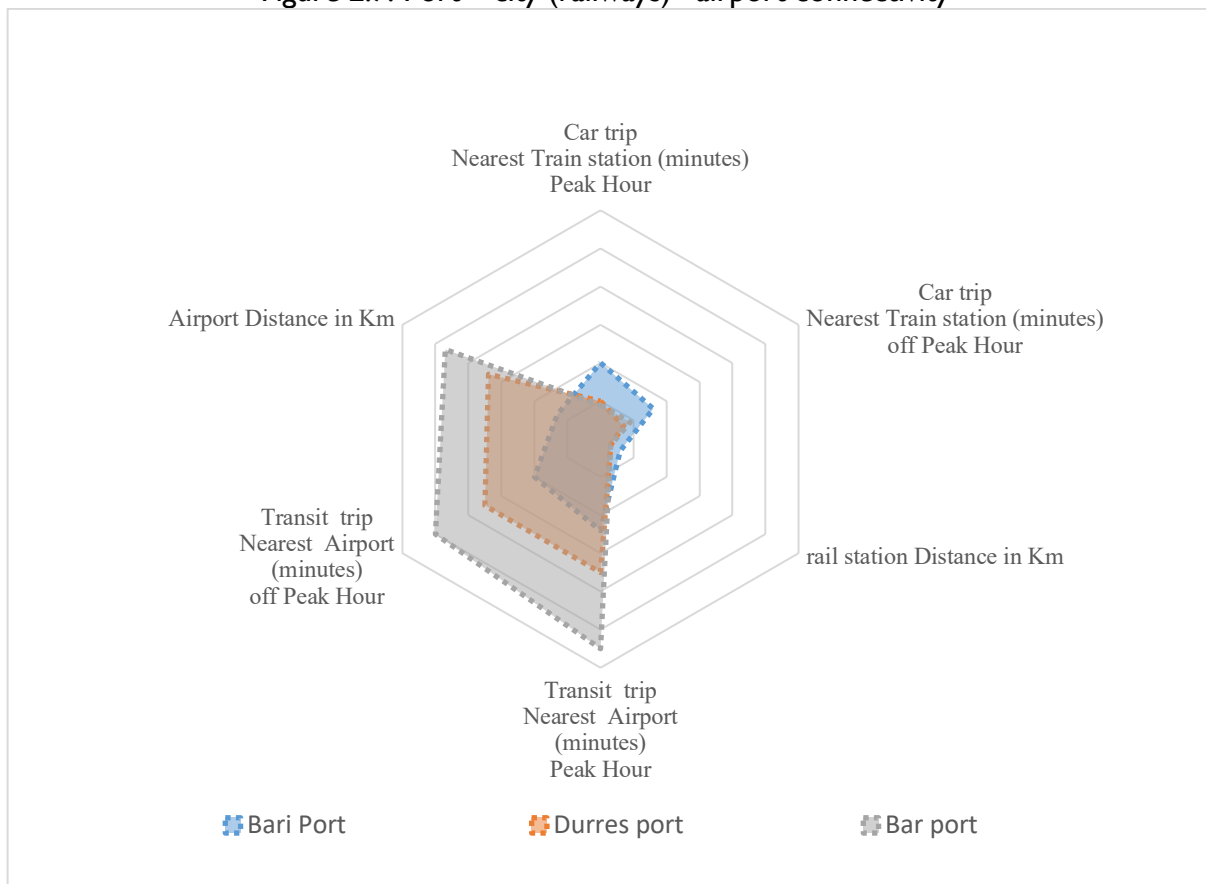
Figure 2.6 below shows that port facilities are situated in close vicinity to the main railway station of the city considered, within a radius that varies between 3 to 6 km. This is due to the structure and traditional interlinkages between rail and port facilities that have often been considered complementary infrastructure for commercial and touristic development and therefore have been combined in close coordination.

The data also show that the availability of a nearby international airport is less convenient and the distances range between 13 to 47 km from the considered port locations.

This reflects the locational constraints that have characterised the development of airport facilities, which typically cannot be located in close vicinity of port facilities, and the limited coordination of the intermodal connectivity in the location considered.

The duration of the trip reflects this different localisation. The transfer time remains quite short between the train station and port facilities ranging between 7 to 20 minutes depending on the timing of the transfer by car and are only partially impacted by local traffic condition. Only the connection between the port and the railway station in Bari shows a measurable difference in peak and off-peak traffic situations. Whereas the transit time by car between port facilities and the nearest international airport ranges between 20 to 55 minutes depending on the location considered and it is very little affected by traffic conditions, showing good highways and motorways infrastructures between ports and airports and direct connectivity.

Figure 2.7. Port – city (railways)– airport connectivity



Source: Authors' elaboration based on Google map, MUVT data, port authorities' data

However, if we turn our attention to the mode of connectivity between those transport facilities, the situation is more scattered with only partial and incomplete transit services to and from port locations. Typically, the offer for port-to-trans station transit is very limited, also due to the relative closeness of the two infrastructures, limiting the offer of this service that is only provided by taxi service. When available, public transportation between port and railways requires a relatively long duration (between 47 and 75 minutes in Bari) and it is not available with good continuity.

The transit service between ports and airports is better structured with greater availability of connection, however also in this case the service quality and frequency are concentrated in the peak hours of the day and might require a significant lead time after 19:00.

Table 2.5. Port-city- airport connection overview

Trimester	Departure	Time	Travel Modes	Duration trip Nearest Train station (minutes)	Distance in Km	Duration trip Nearest Airport (minutes)	Distance in Km	
Trim 2	Bari Port	11/05/2023	7:00 AM	Driving	16	6	20	13
Trim 2	Bari Port	11/05/2023	13:00 PM	Driving	20	6	24	13
Trim 2	Bari Port	11/05/2023	19:00 PM	Driving	16	6	20	13
Trim 2	Bari Port	11/05/2023	7:00 AM	Transit	47	6	69	13
Trim 2	Bari Port	11/05/2023	13:00 PM	Transit	75	6	51	13
Trim 2	Bari Port	11/05/2023	19:00 PM	Transit	NO	6	56	13
Trim 2	Bari Port	11/05/2023	Walking	72	6	NO	13	
Trim 2	Durres port	11/05/2023	7:00 AM	Driving	7	3	35	34
Trim 2	Durres port	11/05/2023	13:00 PM	Driving	10	3	35	34
Trim 2	Durres port	11/05/2023	19:00 PM	Driving	9	3	35	34
Trim 2	Durres port	11/05/2023	7:00 AM	Transit	NO	3	76	34
Trim 2	Durres port	11/05/2023	13:00 PM	Transit	NO	3	76	34
Trim 2	Durres port	11/05/2023	19:00 PM	Transit	NO	3	76	34
Trim 2	Durres port	11/05/2023	Walking	36	3	NO	34	
Trim 2	Bar port	11/05/2023	7:00 AM	Driving	9	3	50	47
Trim 2	Bar port	11/05/2023	13:00 PM	Driving	9	3	55	47
Trim 2	Bar port	11/05/2023	19:00 PM	Driving	9	3	55	47
Trim 2	Bar port	11/05/2023	7:00 AM	Transit	NO	3	NO	47
Trim 2	Bar port	11/05/2023	13:00 PM	Transit	NO	3	NO	47
Trim 2	Bar port	11/05/2023	19:00 PM	Transit	NO	3	NO	47
Trim 2	Bar port	11/05/2023	Walking	41	3	NO	47	

Source: Authors' elaboration based on Google map, MUVT data, port authorities' data

3. Analysis of passengers' reasons for travelling, the difficulties faced by passengers, and their expectations for the future.

Introduction

The quantitative research on passenger traffic flow developed in the previous sections is supplemented by the realization of a qualitative survey. This survey can be administered by direct interviews with passengers – selected by systematic random sampling – to be interviewed at the ports of Bari, Durres and Bar, as well as at the airports of Bari and Tirana.

This section starts by offering a description of the qualitative survey's construction, which is articulated in three main parts: 1) socio-economic characteristics of the passengers; 2) travel information; 3) evaluation of difficulties experienced by passengers and their expectations for the future. Thereafter, the surveys in English, Albanian, Montenegrin and Italian are enclosed in this document.

3.1. Description of the qualitative survey

The qualitative survey aims to provide an accurate picture of passenger's profile along with a description of the difficulties experienced by passengers, and their expectations for the future. The qualitative survey is divided into three parts:

1. the first part of the qualitative survey includes questions aimed at collecting information on the socio-economic characteristics of the passengers, such as gender, country and city of residence, income level, education and job.

2. the second part of the qualitative survey includes questions aimed at acquiring travel information, by focusing on the type of trip (one-way or return), the ferry company, the port of departure and arrival, and the eventual intermediate stages of the trip; moreover, further questions concern the travel motivation, the ticket price, the ticket purchase methods, the type of accommodation on the ferryboat, the time spent in port before embarkation and the embarked vehicle; finally, a specific question is devoted to travel frequency both before and after the COVID-19 emergency to understand whether and how the pandemic has affected the travel behaviour;

3. the third part of the qualitative survey includes questions that point out the difficulties experienced by passengers and their expectations for the future. First of all, the survey questionnaire collects information on the means of transport used to reach the port and the time taken to reach the port of call. Then, a specific question is devoted to understanding the factors that might represent a difficulty for the journey by including a wide range of factors such as the reachability of the port of call, the offer of public transport services to/from the port of call, the waiting times at boarding and disembarkation, the clarity in the display of port signs and indications, the total duration of the trip and services offered on board. The passengers interviewed are asked to evaluate the level of difficulty of each factor, starting from no difficulty up to high difficulty. Moreover, the passengers interviewed are asked to indicate three of the factors previously mentioned that they consider a priority to improve in the near future to make the journey more efficient and comfortable. There is also a specific question regarding the means of transport chosen to reach the port that aims at identifying the importance of several factors in this choice, such as total travel time, the total cost of transport, the number of changes, the probability of arrival on time and compatibility with departure time, the link frequency, the availability of friends/relatives to accompany and of a private car. The passengers interviewed are asked to evaluate the level of importance of each factor, starting from no importance up to extreme importance. Finally, two questions concern maritime transport as compared to air transport in terms of factors that might favour the choice of maritime transport.

The qualitative survey can be administered to passengers through direct interviews at the ports of Bari, Brindisi, Durres and Bar. The survey questionnaire has been developed in Italian and English and translated into Albanian and Montenegrin by the personnel of the respective port authority. In the following pages, the survey questionnaire in the four languages is enclosed.

3.2. Qualitative survey in English

1. Gender		2. Residence	
<input type="checkbox"/> Man	<input type="checkbox"/> Woman	Country_____	City_____

3. Age		4. Gross annual income (in euros)	
<input type="checkbox"/> Under 18 years	<input type="checkbox"/> 45-54	<input type="checkbox"/> Up to 5.000 €	<input type="checkbox"/> 20-35.000 €
<input type="checkbox"/> 18-24	<input type="checkbox"/> 55-64	<input type="checkbox"/> 5-10.000 €	<input type="checkbox"/> 35-50.000 €
<input type="checkbox"/> 25-34	<input type="checkbox"/> More than 65 years	<input type="checkbox"/> 10-20.000 €	<input type="checkbox"/> More than 50.000 €
<input type="checkbox"/> 35-44			

5. Education (please state which highest level of education you have completed)		6. Job		
<input type="checkbox"/> Primary school	Bachelor's degree	<input type="checkbox"/> Freelance professional	<input type="checkbox"/> Trader	<input type="checkbox"/> Housewife/ husband
<input type="checkbox"/> Secondary School	Master	<input type="checkbox"/> Executive, Officer	<input type="checkbox"/> Employee	<input type="checkbox"/> Unemployed
<input type="checkbox"/> High School	Doctorate	<input type="checkbox"/> Farmer, Craftsman, Workman	<input type="checkbox"/> Student	<input type="checkbox"/> Retired
		<input type="checkbox"/> Other _____		

7. Type of trip		8. Shipping company chosen for the trip	
<input type="checkbox"/> One way	<input type="checkbox"/> Return	_____	

9. Port of departure	10. Port of arrival
_____	_____

11. Final destination of the trip	12. Please state if you had any intermediate stage for this trip
_____	<input type="checkbox"/> No <input type="checkbox"/> Yes (Specify) _____

13. Did you travel alone or with somebody else?		14. Main reason for the trip		
<input type="checkbox"/> Nobody	<input type="checkbox"/> Friends	<input type="checkbox"/> Tourism	<input type="checkbox"/> Study	<input type="checkbox"/> Religion
<input type="checkbox"/> Partner	<input type="checkbox"/> Colleagues	<input type="checkbox"/> Business/Work	<input type="checkbox"/> Sport	<input type="checkbox"/> Health care
<input type="checkbox"/> Relatives	Enter the number _____	<input type="checkbox"/> Visit relatives/friends	<input type="checkbox"/> Events	<input type="checkbox"/> Other _____

15. Ticket price (in euro) _____

16. Where you have purchased your ticket?		17. Type of accommodation	
<input type="checkbox"/> Port ticket office	<input type="checkbox"/> Travel agency	<input type="checkbox"/> Deck seat	<input type="checkbox"/> Cabin
<input type="checkbox"/> Internet	<input type="checkbox"/> Altro _____	<input type="checkbox"/> Assigned Seats	<input type="checkbox"/> Other _____

18. Time spent in port before embarkation for control procedures		19. Embarked vehicle		
<input type="checkbox"/> Less than 30'	<input type="checkbox"/> between 1 e 2 ore	<input type="checkbox"/> None	<input type="checkbox"/> Motorcycles/ Scooters	<input type="checkbox"/> Van/Truck
<input type="checkbox"/> Between 30' and 60'	<input type="checkbox"/> Over two hours	<input type="checkbox"/> Bicycle	<input type="checkbox"/> Car	<input type="checkbox"/> Camper
		<input type="checkbox"/> Other _____ (please specify)		

20. Before the COVID-19 emergency, how often did you travel to/from this port?		21. After the COVID-19 emergency, how often did you travel to or from this port?	
<input type="checkbox"/> Less than once a year	<input type="checkbox"/> Four to six times a year	<input type="checkbox"/> Less than once a year	<input type="checkbox"/> Four to six times a year
<input type="checkbox"/> Once a year	<input type="checkbox"/> Seven to ten times a year	<input type="checkbox"/> Once a year	<input type="checkbox"/> Seven to ten times a year
<input type="checkbox"/> Two to three times a year	<input type="checkbox"/> More than ten times a year	<input type="checkbox"/> Two to three times a year	<input type="checkbox"/> More than ten times a year

22. Means of transport used to reach the port of call			23. Time taken to reach the port of call from the place of departure	
<input type="checkbox"/> Private vehicle	<input type="checkbox"/> Bus	<input type="checkbox"/> Other _____	<input type="checkbox"/> Less than 30'	<input type="checkbox"/> Between 1 e 2 Hours
<input type="checkbox"/> Rental vehicle	<input type="checkbox"/> Taxi	Expenses (in Euros) _____	<input type="checkbox"/> Between 30' and 60'	<input type="checkbox"/> Over two hours

24. Which of the following factors represents a difficulty for your journey to/from this port of call (1 = no difficulty; 5 = high difficulty)					
	1	2	3	4	5
Reachability of the port of call from the point of origin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Offer of public transport services to/from the port of call	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Waiting times at boarding (including pre-boarding checks)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Waiting time on disembarkation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clarity in the display of port signs and indications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Total duration of the trip	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Services offered on board (catering, toilets, points of sale, battery charging points)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

25. How important are the following aspects in choosing the means of transport used to reach this port? (1 = not at all important; 5 = extremely important).					
	1	2	3	4	5
Total travel time (from the place of departure to the port)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Total cost of transport (ticket, fuel, highway, parking)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of changes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Probability of arrival on time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compatibility with departure time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Link frequency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of friends/relatives to accompany	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of a private car	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

26. How much did the following aspects influence the choice to use maritime transport compared to air transport? (1 = not at all influential; 5 = extremely influential).					
	1	2	3	4	5
Lower rates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Centrality of the port with respect to the airport	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Need to embark a means of transport	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of outdoor spaces during the trip (wrt COVID-19)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall travel comfort	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

27. In light of your travel experience, what means of transport would you use to travel to/from this destination next time?	
<input type="checkbox"/> Ship/ferry <input type="checkbox"/> Aeroplane <input type="checkbox"/> Any means of transport <input type="checkbox"/> Wouldn't come back here again	

28. Please indicate <u>three factors</u> that you think are a priority to improve in the near future to make your journey to/from this port of call more efficient and comfortable.	
Reachability of the port of call from the point of origin	<input type="checkbox"/>
Offer of public transport services to/from the port of call	<input type="checkbox"/>
Waiting times at boarding (including pre-boarding checks)	<input type="checkbox"/>
Waiting time on disembarkation	<input type="checkbox"/>
Clarity in the display of port signs and indications	<input type="checkbox"/>
Total duration of the trip	<input type="checkbox"/>
Services offered on board (catering, toilets, points of sale, battery charging points)	<input type="checkbox"/>

3.3. Qualitative survey in Albanian

1. Gjinia		2.Vendbanimi	
<input type="checkbox"/> Mashkull	<input type="checkbox"/> Femër	Shteti _____	Qyteti _____

3. Moshë		4. Të ardhura vjetore Bruto (në euro)	
<input type="checkbox"/> Nën 18vjeç	<input type="checkbox"/> 45-54	<input type="checkbox"/> Mbi 5.000 €	<input type="checkbox"/> 20-35.000 €
<input type="checkbox"/> 18-24	<input type="checkbox"/> 55-64	<input type="checkbox"/> 5-10.000 €	<input type="checkbox"/> 35-50.000 €
<input type="checkbox"/> 25-34	<input type="checkbox"/> Më shumë se 65 vjeç	<input type="checkbox"/> 10-20.000 €	<input type="checkbox"/> Më shumë se 50.000 €
<input type="checkbox"/> 35-44			

5. Edukimi (Ju lutem tregoni nivelin më të lartë të arsimit që keni përfunduar)		6. Profesioni		
<input type="checkbox"/> Shkolla Fillore	Diplomë Baçelor	<input type="checkbox"/> Profesionist I I pavarur	<input type="checkbox"/> Tregtar	<input type="checkbox"/> Shtëpiake / Bashkëshort
	Master	<input type="checkbox"/> Ekzekutiv , Oficer	<input type="checkbox"/> Punonjës	<input type="checkbox"/> I Papunë
<input type="checkbox"/> Shkolla mesme	Doktoraturë	<input type="checkbox"/> Bujk, Zejtar, Punëtor	<input type="checkbox"/> Student	<input type="checkbox"/> Në Pension
		<input type="checkbox"/> Tjetër _____		

7. Lloji I udhëtimit		8. Kompania e Transportit që keni zgjedhur për udhëtim	
<input type="checkbox"/> Vetëm vajtje	<input type="checkbox"/> Kthim	_____	

9. Porti i nisjes	10. Porti i mbërritjes
_____	_____

11. Destinacioni fundit i udhëtimit	12. Ju lutem tregoni nëse keni pasur ndonjë fazë të ndërmjetme në këtë udhëtim	
_____	<input type="checkbox"/> JO	<input type="checkbox"/> PO (Specifiko) _____

13. Keni udhëtuar vetëm ose me dikë tjetër ?		14.Arsyet kryesore për udhëtimin		
<input type="checkbox"/> Asnjë	<input type="checkbox"/> Miq	<input type="checkbox"/> Turizëm	<input type="checkbox"/> Studime	<input type="checkbox"/> Fe
<input type="checkbox"/> Partner	<input type="checkbox"/> Kolege	<input type="checkbox"/> Biznes/ Pune	<input type="checkbox"/> Sport	<input type="checkbox"/> Shëndet
<input type="checkbox"/> Të afërm	Shkruani Numrin _____	<input type="checkbox"/> Të takoj të afërmit/Miq të	<input type="checkbox"/> Evente	<input type="checkbox"/> Të tjera ____

15. Çmimi Biletës (në euro) _____

16. Ku e keni blere biletën tuaj ?		17. Lloji I akomodimit	
<input type="checkbox"/> Pranë zyrave portuale	<input type="checkbox"/> Agjensi udhëtimi	<input type="checkbox"/> Vend në kuvertë	<input type="checkbox"/> Kabinë
<input type="checkbox"/> Internet	<input type="checkbox"/> Tjetër _____	<input type="checkbox"/> Vende të caktuara	<input type="checkbox"/> Tjetër _____

18. Koha e kaluar në port para nisjes për procedurat e kontrollit		19. Mjeti embarkos		
<input type="checkbox"/> Më pak se 30'	<input type="checkbox"/> Midis 1 ose 2 orë	<input type="checkbox"/> Asnjë	<input type="checkbox"/> Motoçikleta/S kuter	<input type="checkbox"/> Fugon/Kamion
<input type="checkbox"/> Midis 30' dhe 60'	Mbi dy orë	<input type="checkbox"/> Biçikletë	<input type="checkbox"/> Makinë	<input type="checkbox"/> Kamper
		<input type="checkbox"/> Tjetër _____	(Specifiko)	

20. Përpara COVID-19 emergency, sa shpesh keni udhëtuar drejt/ nga ky port?		21. Pas COVID-19, sa shpesh keni udhëtuar drejt/ nga ky port?	
<input type="checkbox"/> Më pak se një herë në vit	<input type="checkbox"/> Katër – gjashtë herë në vit	<input type="checkbox"/> Më pak se një herë në vit	<input type="checkbox"/> Katër – gjashtë herë në vit
<input type="checkbox"/> Një herë në vit	<input type="checkbox"/> Shtatë deri në 10 herë në vit	<input type="checkbox"/> Një herë në vit	<input type="checkbox"/> Shtatë deri në dhjetë herë në vit
<input type="checkbox"/> Dy ose tre herë në vit	<input type="checkbox"/> Më shumë se dhjetë herë në vit	<input type="checkbox"/> Dy ose tre herë në vit	<input type="checkbox"/> Më shumë se dhjetë herë në vit

22. Mjetet e transportit të përdorura në portin prites			23. Koha e nevojshme për të arritur në portin prites nga vendi i nisjes	
<input type="checkbox"/> Mjet privat	<input type="checkbox"/> Bus	<input type="checkbox"/> Tjetër _____	<input type="checkbox"/> Më pak se 30'	<input type="checkbox"/> Midis 1 e 2 orë
<input type="checkbox"/> Mjet me qira	<input type="checkbox"/> Taxi	Shpenzime (në Euro) __	<input type="checkbox"/> Midis 30'dhe 60'	<input type="checkbox"/> Mbi dy orë

24. Cili nga faktorët e mëposhtëm përfaqëson një vështirësi për udhëtimin tuaj drejt/nga ky port prites (1 = pa vështirësi; 5 = vështirësi e lartë)					
	1	2	3	4	5
Arritshmëria e portit pritës nga pika e origjines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ofertat e transportit publik për tek/ nga Porti prites	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Koha e pritjes në hipje duke përfshirë dhe kontrollet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Koha e pritjes gjatë zbarkimit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Qartësia e vijëzimit dhe treguesve në port	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kohëzgjatja totale e udhëtimit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shërbimet e ofruara në bord(katering, tualete, pika shitjeje, pika karikimi të baterive)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

25. Sa të rëndësishme janë aspektet e mëposhtme në zgjedhjen e mjeteve të transportit të përdorura për të arritur në këtë port? (1 = aspak e rëndësishme; 5 = jashtëzakonisht e rëndësishme).					
	1	2	3	4	5
Koha totale e udhëtimit (nga vendi i nisjes për në port)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kosto totale e udhëtimit (bileta, karburanti, autostrada, parkimi)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Numri i ndryshimeve	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mundësia e arritjes në kohë	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pajtueshmëria me kohën e nisjes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Frekuenca e lidhjes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Disponueshmëria e miqve/ të të afërmeve për shoqërim	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Disponueshmëria e një makine private	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

26. Sa kanë ndikuar aspektet e mëposhtme në zgjedhjen e përdorimit të transportit detar në krahasim me transportin ajror? (1 = aspak me ndikim; 5 = jashtëzakonisht me ndikim).					
	1	2	3	4	5
Norma më të ulëta	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Afërsia portit me aeroportin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nevoja për të përdorur një mjet transporti	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Disponueshmëria e hapësirave të jashtme gjatë (wrt COVID-19)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Komoditeti i përgjithshëm në udhëtim	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

27. Nga ekperienca juaj në udhetime , cfare mjete transporti do të perdorni për të udhëtuar nga /tek destinacioni juaj I ardhshëm ?

- Anije/Traget
- Aeroplan
- Çdo mjet transporti
- Nuk do të kthehesha më këtu

28. Ju lutemi, tregoni tre faktorë që mendoni se janë prioritet për t'u përmirësuar në të ardhmen e afërt për ta bërë udhëtimin tuaj drejt/nga ky port kontakti më efikas dhe komod.

Arritshmëria e portit pritës nga pika e origjines	<input type="checkbox"/>
Ofertat e transportit publik për tek/ nga Porti prites	<input type="checkbox"/>
Koha e pritjes nëe hipje duke përfshirë dhe kontrollet	<input type="checkbox"/>
Koha e pritjes gjatë zbarkimit	<input type="checkbox"/>
Qartesia e vijezimit dhe treguesve në port	<input type="checkbox"/>
Kohëzgjatja totale e udhëtimit	<input type="checkbox"/>
Shërbimet e ofruara në bord(katering, tualete, pika shitjeje, pika karikimi të baterive)	<input type="checkbox"/>

3.4. Qualitative survey in Montenegro

1. Pol		2. Prebivalište	
<input type="checkbox"/> Muški	<input type="checkbox"/> Ženski	Država _____	Grad _____

3. Godine		4. Bruto godišnji prihod (u eurima)	
<input type="checkbox"/> Ispod 18 godina	<input type="checkbox"/> 45-54	<input type="checkbox"/> Do 5.000 €	<input type="checkbox"/> 20-35.000 €
<input type="checkbox"/> 18-24	<input type="checkbox"/> 55-64	<input type="checkbox"/> 5-10.000 €	<input type="checkbox"/> 35-50.000 €
<input type="checkbox"/> 25-34	<input type="checkbox"/> Više od 65 godina	<input type="checkbox"/> 10-20.000 €	<input type="checkbox"/> Više od 50.000 €
<input type="checkbox"/> 35-44			

5. Obrazovanje (molimo Vas da navedete najviši stepen Vašeg obrazovanja)		6. Zanimanje		
<input type="checkbox"/> Osnovna škola	Bečelor diploma	<input type="checkbox"/> Frilenser	<input type="checkbox"/> Trgovac	<input type="checkbox"/> Domaćica/ domaćin
<input type="checkbox"/> Srednja stručna škola	Master diploma	<input type="checkbox"/> Menadžer, službenik	<input type="checkbox"/> Zaposleni	<input type="checkbox"/> Nezaposleni
<input type="checkbox"/> Srednja škola	Doktorat	<input type="checkbox"/> Zemljoradnik, zantlija, radnik	<input type="checkbox"/> Student	<input type="checkbox"/> Penzioner
		<input type="checkbox"/> Ostalo _____		

7. Vrsta putovanja		8. Kompanija koja je izabrana za putovanje	
<input type="checkbox"/> U jednom pravcu	<input type="checkbox"/> Povratno	_____	

9. Luka polaska	10. Luka dolaska
_____	_____

11. Konačno odredište putovanja	12. Molimo Vas da navedete ukoliko ste u međuvremenu negdje pristajali
_____	<input type="checkbox"/> Ne <input type="checkbox"/> Da (Navesti) _____

13. Da li ste putovali sami ili sa još nekim?		14. Glavni razlog putovanja		
<input type="checkbox"/> Sam/a	<input type="checkbox"/> Sa prijateljima	<input type="checkbox"/> Turistički	<input type="checkbox"/> Studiranje	<input type="checkbox"/> Religija
<input type="checkbox"/> Sa supružnikom/com	<input type="checkbox"/> Sa kolegama	<input type="checkbox"/> Posao	<input type="checkbox"/> Sport	<input type="checkbox"/> Zdravstveni razlozi
<input type="checkbox"/> Sa rođacima	Unesite broj _____	<input type="checkbox"/> Posjeta rođacima/prijateljima	<input type="checkbox"/> Događaji	<input type="checkbox"/> Ostalo __

15. Cijena karte (u eurima) _____

16. Gdje ste kupili kartu?		17. Vrsta smještaja	
<input type="checkbox"/> Na šalteru luke	<input type="checkbox"/> U putničkoj agenciji	<input type="checkbox"/> Bez kabinskog smještaja	<input type="checkbox"/> Kabina
<input type="checkbox"/> Na internetu	<input type="checkbox"/> Ostalo _____	<input type="checkbox"/> Avio sjedište	<input type="checkbox"/> Ostalo _____

18. Vrijeme provedeno u luci prije ukrcaja zbog procedure kontrole		19. Ukrcano vozilo		
<input type="checkbox"/> Manje od 30'	<input type="checkbox"/> Između 1 i 2 sata	<input type="checkbox"/> Nijedno	<input type="checkbox"/> Motocikl/Skuter	<input type="checkbox"/> Kamion

<input type="checkbox"/> Između 30' i 60'	<input type="checkbox"/> Preko dva sata	<input type="checkbox"/> Bicikl	<input type="checkbox"/> Automobil	<input type="checkbox"/> Kamp prikolica
		<input type="checkbox"/> Ostalo _____ (molimo Vas navedite)		

20. Prije COVID-19, koliko često ste putovali u ovu luku/iz ove luke?		21. Nakon COVID-19, koliko često ste putovali u ovu luku/iz ove luke?	
<input type="checkbox"/> Manje od jednom godišnje	<input type="checkbox"/> Četiri do šest puta godišnje	<input type="checkbox"/> Manje od jednom godišnje	<input type="checkbox"/> Četiri do šest puta godišnje
<input type="checkbox"/> Jednom godišnje	<input type="checkbox"/> Sedam do deset puta godišnje	<input type="checkbox"/> Jednom godišnje	<input type="checkbox"/> Sedam do deset puta godišnje
<input type="checkbox"/> Dva ili tri puta godišnje	<input type="checkbox"/> Više od deset puta godišnje	<input type="checkbox"/> Dva ili tri puta godišnje	<input type="checkbox"/> Više od deset puta godišnje

22. Vid transporta korišćen da bi se stiglo do usputne luke			23. Vrijeme potrebno da se stigne od usputne luke do mjesta polaska	
<input type="checkbox"/> Privatni automobil	<input type="checkbox"/> Autobus	<input type="checkbox"/> Ostalo _____	<input type="checkbox"/> Manje od 30'	<input type="checkbox"/> Između 1 i 2 sata
<input type="checkbox"/> Iznajmljen automobil	<input type="checkbox"/> Taksi	Troškovi (u eurima) _____	<input type="checkbox"/> Između 30' i 60'	<input type="checkbox"/> Preko dva sata

24. Koji od sljedećih faktora predstavljaju prepreke na Vašem putovanju u usputnu luku/iz usputne luke (1 = nema prepreka; 5 = dosta teško)					
	1	2	3	4	5
Udaljenost usputne luke od mjesta polaska	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ponuda usluga javnog prevoza iz/do usputne luke	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vrijeme čekanja pri ukrcaju (uključujući kontrole pri ukrcaju)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vrijeme čekanja prilikom iskrcaja	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jasnoća prikaza lučkih znakova i oznaka	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ukupno trajanje putovanja	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Usluge koje se nude na palubi (ketering, toaleti, prodajna mjesta, električne punionice)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

25. Koliko su važni sljedeći aspekti pri odabiru vida transporta da bi se stiglo do ove luke? (1 = uopšte nije važno; 5 = veoma važno).					
	1	2	3	4	5
Ukupno vrijeme putovanja (od mjesta polaska do luke)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ukupni troškovi prevoza (karta, gorivo, put, parking)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Broj presijedanja	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vjerovatnoća dolaska na vrijeme	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Usklađenost sa vremenom odlaska	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Učestalost	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dostupnost prijatelja/rođaka da putuju	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dostupnost privatnog automobila	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

26. Koliko su sljedeći aspekti uticali na izbor pomorskog saobraćaj u odnosu na vazdušni saobraćaj? (1 = uopšte ne utiču; 5 = veoma utiču).					
	1	2	3	4	5
Niže cijene	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Udaljenost luke od aerodroma	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Potreba da se ukrca neko vozilo	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dostupnost otvorenih površina tokom putovanja (wrt COVID-19)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cjelokupna udobnost putovanja	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

27. S obzirom na Vaše putovanje, koje biste prevozno sredstvo koristili naredni put do/iz ove destinacije?	
<input type="checkbox"/> Brod/feribot <input type="checkbox"/> Avion <input type="checkbox"/> Bilo koji vid transporta <input type="checkbox"/> Ne bih se ovdje vraćao/la	
28. Molimo Vas da ukažete na <u>tri faktora</u> za koja mislite da treba unaprijediti u bližoj budućnosti kako bi Vaše putovanje u/iz ove usputne luke učinili efikasnijim i udobnijim.	
Udaljenost usputne luke od mjesta polaska	<input type="checkbox"/>
Ponuda usluga javnog prevoza iz/do usputne luke	<input type="checkbox"/>
Vrijeme čekanja pri ukrcaju (uključujući kontrole pri ukrcaju)	<input type="checkbox"/>
Vrijeme čekanja prilikom iskrcaja	<input type="checkbox"/>
Jasnoća prikaza lučkih znakova i oznaka	<input type="checkbox"/>
Ukupno trajanje putovanja	<input type="checkbox"/>
Usluge koje se nude na palubi (ketering, toaleti, prodajna mjesta, električne punionice)	<input type="checkbox"/>

3.5. Qualitative survey in Italian

1. Genere		2. Residenza	
<input type="checkbox"/> Uomo	<input type="checkbox"/> Donna	Nazione _____	Città _____

3. Età		4. Reddito annuo lordo (in euro)	
<input type="checkbox"/> Meno di 18 anni	<input type="checkbox"/> 45-54 anni	<input type="checkbox"/> Fino a 5.000 €	<input type="checkbox"/> 20-35.000 €
<input type="checkbox"/> 18-24 anni	<input type="checkbox"/> 55-64 anni	<input type="checkbox"/> 5-10.000 €	<input type="checkbox"/> 35-50.000 €
<input type="checkbox"/> 25-34 anni	<input type="checkbox"/> Più di 65 anni	<input type="checkbox"/> 10-20.000 €	<input type="checkbox"/> Più di 50.000 €
<input type="checkbox"/> 35-44 anni			

5. Istruzione		6. Professione		
<input type="checkbox"/> Licenza elementare	Laurea triennale	<input type="checkbox"/> Imprenditore, Libero professionista	<input type="checkbox"/> Commercia nte	<input type="checkbox"/> Casalingo
<input type="checkbox"/> Licenza media	Laurea magistrale	<input type="checkbox"/> Dirigente, Funzionario	<input type="checkbox"/> Impiegato	<input type="checkbox"/> Disoccupato
<input type="checkbox"/> Diploma	Dottorato	<input type="checkbox"/> Agricoltore, Artigiano	<input type="checkbox"/> Studente	<input type="checkbox"/> Pensionato
		<input type="checkbox"/> Altro _____		

7. Viaggio di:		8. Compagnia marittima scelta per il viaggio	
<input type="checkbox"/> Andata	<input type="checkbox"/> Ritorno	_____	

9. Porto di partenza	10. Porto di arrivo
_____	_____

11. Destinazione finale del viaggio	12. Tappe intermedie	
_____	<input type="checkbox"/> No	<input type="checkbox"/> Sì (indicare) _____

13. Compagni di viaggio		14. Motivo principale del viaggio		
<input type="checkbox"/> Nessuno	<input type="checkbox"/> Amici	<input type="checkbox"/> Turismo	<input type="checkbox"/> Studio	<input type="checkbox"/> Religione
<input type="checkbox"/> Partner	<input type="checkbox"/> Colleghi	<input type="checkbox"/> Affari/Lavoro	<input type="checkbox"/> Sport	<input type="checkbox"/> Salute
<input type="checkbox"/> Parenti	Indicare il numero _____	<input type="checkbox"/> Visita parenti/amici	<input type="checkbox"/> Eventi	<input type="checkbox"/> Altro _____

15. Prezzo del biglietto (in euro) _____
--

16. Canale di acquisto del biglietto		17. Tipologia sistemazione	
<input type="checkbox"/> Biglietteria portuale	<input type="checkbox"/> Agenzia viaggi	<input type="checkbox"/> Passaggio ponte	<input type="checkbox"/> Cabina
<input type="checkbox"/> Internet	<input type="checkbox"/> Altro _____	<input type="checkbox"/> Poltrona	<input type="checkbox"/> Altro _____

18. Tempo di permanenza in porto prima dell'imbarco per le procedure di controllo		19. Veicolo imbarcato		
<input type="checkbox"/> Meno di 30'	<input type="checkbox"/> Tra 1 e 2 ore	<input type="checkbox"/> Nessuno	<input type="checkbox"/> Moto/Scoote r	<input type="checkbox"/> Furgone/Camion
<input type="checkbox"/> Tra 30' e 60'	<input type="checkbox"/> Oltre due ore	<input type="checkbox"/> Bicicletta	<input type="checkbox"/> Automobile	<input type="checkbox"/> Camper
		<input type="checkbox"/> Altro _____ (indicare)		

20. Prima dell'emergenza COVID-19, con che frequenza ha viaggiato da/per questo scalo portuale?		21. Dopo l'emergenza COVID-19, con che frequenza ha viaggiato da o per questo scalo portuale?	
<input type="checkbox"/> Meno di una volta l'anno	<input type="checkbox"/> Quattro-sei volte l'anno	<input type="checkbox"/> Meno di una volta l'anno	<input type="checkbox"/> Quattro-sei volte l'anno
<input type="checkbox"/> Una volta l'anno	<input type="checkbox"/> Sette-dieci volte l'anno	<input type="checkbox"/> Una volta l'anno	<input type="checkbox"/> Sette-dieci volte l'anno
<input type="checkbox"/> Due-tre volte l'anno	<input type="checkbox"/> Più di dieci volte l'anno	<input type="checkbox"/> Due-tre volte l'anno	<input type="checkbox"/> Più di dieci volte l'anno

22. Mezzo di trasporto utilizzato per raggiungere lo scalo portuale			23. Tempo impiegato per raggiungere lo scalo portuale dal luogo di partenza		
<input type="checkbox"/> Mezzo privata	<input type="checkbox"/> Bus	<input type="checkbox"/> Altro _ _ _ _ _	<input type="checkbox"/> Meno di 30'	<input type="checkbox"/> Tra 1 e 2 ore	<input type="checkbox"/> Meno di 30'
<input type="checkbox"/> Mezzo a noleggio	<input type="checkbox"/> Taxi	Spesa (in euro) _ _ _	<input type="checkbox"/> Tra 30' e 60'	<input type="checkbox"/> Oltre due ore	<input type="checkbox"/> Tra 30' e 60'

24. Quali dei seguenti fattori hanno rappresentato una difficoltà per il suo viaggio da/per questo scalo portuale (1 = nessuna difficoltà; 5 = difficoltà elevata).					
	1	2	3	4	5
Raggiungibilità dello scalo portuale dal punto di origine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Offerta di servizi di trasporto pubblico da/per lo scalo portuale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tempi di attesa all'imbarco (compresi i controlli pre-imbarco)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tempi di attesa allo sbarco	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comprensibilità della segnaletica portuale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Durata totale del viaggio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Servizi offerti a bordo (ristorazione, toilette, punti vendita, punti di ricarica batterie)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

25. Quanto sono importanti i seguenti aspetti nella scelta del mezzo di trasporto utilizzato per raggiungere questo scalo portuale? (1 = per niente importante; 5 = estremamente importante).					
	1	2	3	4	5
Tempo di percorrenza totale (dal luogo di partenza fino porto)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Costo totale del trasporto (biglietto, carburante, autostrada, parcheggio)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Numero di cambi	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Probabilità di arrivo in orario	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compatibilità con l'orario di partenza	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Frequenza del collegamento	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Disponibilità di amici/parenti ad accompagnarla	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Disponibilità di un'auto privata	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

26. Quanto hanno influito i seguenti aspetti nella scelta di utilizzare il trasporto marittimo rispetto al trasporto aereo? (1 = per niente influente; 5 = estremamente influente).					
	1	2	3	4	5
Tariffe più basse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Centralità del porto rispetto all'aeroporto	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Necessità di imbarcare un mezzo di trasporto	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Disponibilità di spazi all'aperto durante il viaggio (rif. COVID-19)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comodità complessiva del viaggio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

27. Alla luce della sua esperienza di viaggio, quale mezzo di trasporto utilizzerebbe per viaggiare di nuovo da/per questa destinazione?	
<input type="checkbox"/> Nave <input type="checkbox"/> Aereo <input type="checkbox"/> Qualsiasi mezzo di trasporto <input type="checkbox"/> Non ritornerei	

28. Indichi <u>massimo tre fattori</u> che ritiene sia prioritario migliorare nel prossimo futuro per rendere il viaggio da/per questo scalo portuale più efficiente e confortevole.	
Raggiungibilità dello scalo portuale dal punto di origine	<input type="checkbox"/>
Offerta di servizi di trasporto pubblico da/per lo scalo portuale	<input type="checkbox"/>
Tempi di attesa all'imbarco (compresi i controlli pre-imbarco)	<input type="checkbox"/>
Tempi di attesa allo sbarco	<input type="checkbox"/>
Comprensibilità della segnaletica portuale	<input type="checkbox"/>
Durata totale del viaggio	<input type="checkbox"/>
Servizi offerti a bordo (ristorazione, toilette, punti vendita, punti di ricarica batterie)	<input type="checkbox"/>

4. Conclusions

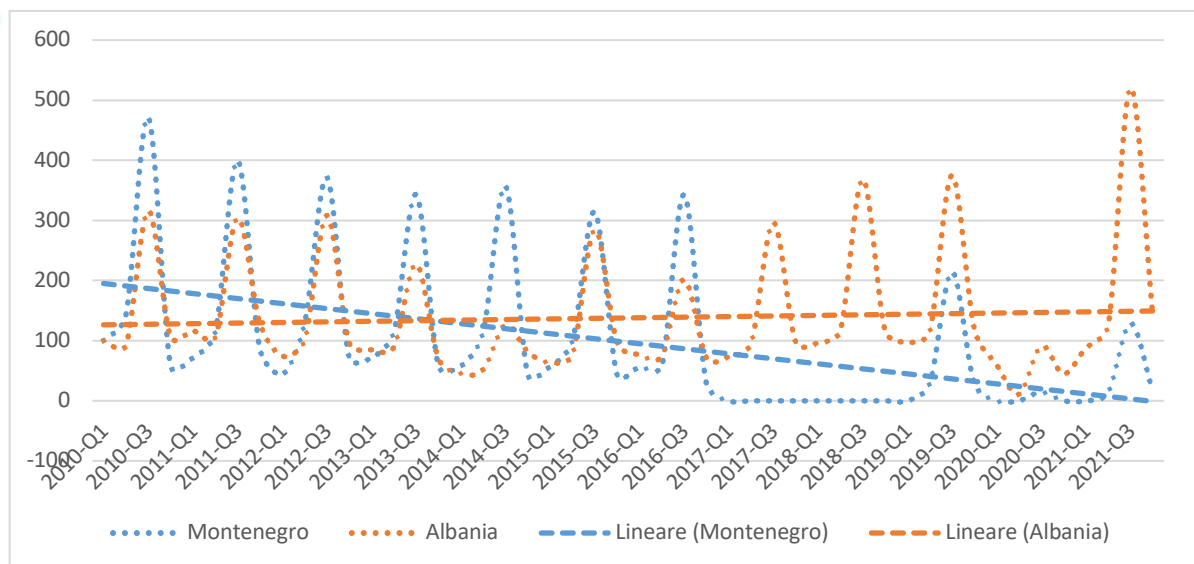
The analysis provided in this report has offered a comprehensive overview of passengers' mobility in the lower Adriatic region, providing a special focus on the connectivity between the main ports in Region: Bari (Italy), Bar (Montenegro) and Durres (Albania).

The research has analysed, based on the data available at the time of the compilation of the study, long-term trends in Port connectivity and has briefly analysed the Air transport connectivity between Bari – Albania (Tirana) and Montenegro (Tivat).

The report has also explored the availability and characteristics of port-city-airport connectivity for each of the port destinations analysed.

- The analysis has shown that Bari port, and to some extent also Brindisi port, show a positive outlook in terms of general port traffic compared to the trend in Italy, performing a positive rebound after the COVID-19 lockdown that has virtually stopped port traffic internationally.
- The long-term trend with data normalised at the reference year (2010 Q1) depicted in Fig 2.8 shows two diverging trends, with a growing weight in relative and absolute terms of the traffic to and From Albania and a slightly decreasing trend for Montenegro. While in absolute value the volume of traffic from Albania has been larger than the traffic from Montenegro, (representing respectively 59% and 5% of the total passenger traffic mobilised at Bari Port for the period considered) this difference in terms of relative and absolute weight is increasing over time due to the decline in passengers' traffic from Montenegro.

Figure 2.8. Passenger traffic at Bari port – 2010/2021



Source: EUROSTAT (number of passengers excludes cruise passengers).

These results are confirmed when we focus on the main routes, connecting respectively Durres-Bari-Durres and Bar-Bari-Bar.

- The route Durres-Bari-Durres shows a relatively stable and increasing trend in the period 2014-19 and a strong rebound after the COVID-19 pandemic. In this generally positive framework, Durres outperforms other ports in the country (Vlora and Saranda) and confirms its leading role in Albania (refer to Fig. 1.6. and 1.7.)
- The route Bar-Bari-Bar instead is characterised by a weak passenger performance and is in line with the steady decline of the passenger traffic to/from Montenegro.

Also, the air traffic data confirm the picture described above for port passengers in the Region.

- Air traffic Bari-Tirana shows a robust performance before and after the COVID-19 pandemic and increased the total number of passengers on the route from 56.344 in 2017 to 79.905 in 2022.
- On the contrary, the air traffic Bari – Tivat connecting Bari with Montenegro ceased activities after 2017 confirming the negative outlook limited offer and demand for connectivity between these locations.

We have turned our attention to analysing the interconnectivity between transport facilities and infrastructures at the city level exploring the transit time between port, nearest train station and nearest international airport. The results depicted in Table 2.5 show a multifaceted situation.

- Port and train stations are located in close proximity to each other (max 6km radius) and this undoubtedly facilitates the transit to and from the station after (before) disembarkment (embarkment) with own transportation or on foot.
- However, the transit from the port to the train station with public transport facilities is not always direct and is not available with continuity.
- On the other hand, there is always an available public transport transit to (from) the nearest international airport. However, this might be direct (Durres, Bar) or with changes (Bari) with an obvious impact on the duration of the transit.

From the above indications, some consideration seems to emerge. The general macroeconomic scenario defines a relatively stable, trending upward, traffic between the two shores of the Adriatic Sea, where the decline in one route (Bar-Bari-Bar) has been more than compensated by the increase between Durres-Bari-Durres. In this framework, the increasing integration and mobility of the respective communities gravitating around the three port areas considered requires a parallel integration of the intermodal transport opportunities between air, sea, and rail passengers that would benefit from reinforced interconnections between transport facilities at the destination.

Finally, we consider it would be beneficial to identify directly from customers and passengers obstacles and priorities for maritime transportation at each destination. This analysis together with a set of socio-economic indicators will allow policymakers and port authorities to better calibrate their interventions in the future to align their service offering to customers needs and expectations. To this end, a set of qualitative surveys has been designed and is made available for further adoption in the future.



Autoriteti Portual Durrës
DURRËS PORT AUTHORITY



Autorità di Sistema Portuale
del Mare Adriatico Meridionale
Sist. Portuale Meridionale Adriatico

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