Current Tourism Trends in The Balkans

New Deal Europe **- the only platform dedicated to growing tourism to the entire Greater Balkans region.**

NEW DEAL **EUROPE**®

Agenda for today:

Introduction:

Robert Dee & Tine Murn
Co-Flounders of New Deal Europe

Report: *Travel Trends in the Balkans*

Anna Borduzha
VP Business Development, Mabrian

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New Deal Europe

5 Elements of the Platform

1. *Representation*
2. *Consultation*
3. *Media*
4. *Education*
5. *Events*

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Partnership

ETOA: European Tourism Association

ETOA

NEW DEAL EUROPE

Partnership

ETOA: European Tourism Association

- **Founded in 1989** as a not-for-profit association to give a voice for the European travel industry at EU, national and local levels

- **1,100+ member companies includes:**
    - 700+ European in-destination partners
    - 115 National and local tourist boards
    - 350+ Tour Operators

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Key benefits

ETOA: European Tourism Association

ETOA

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Key benefits

ETOA: European Tourism Association

- A voice for the Balkan Region
- Access for all staff to 6000+ member contacts across the ETOA membership network
- Exclusive access to online resources, market intelligence, research and reports
- Regular member-exclusive updates and webinars
- Use of the ETOA member logo for all marketing and communications
- Range of B2B Marketplace events

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ETOA GEM 2022

2022
The Global European Marketplace

3. – 4. November 22
London

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ETOA GEM 2022

- ETOA's showpiece marketplace
- The whole membership comes together for one day
- Over 800 decision makers from across the entire membership
- @ 18,000 meetings in one day
- **Special discounted** membership and GEM packages available exclusively **through New Deal Europe**

2022
The Global European Marketplace

3. – 4. November 22
London

NEW DEAL **EUROPE**

Global Travel Week

London 28-29 September 2022

GLOBAL
TRAVEL WEEK

Join us at the New Deal Europe Pavilion!

NEW DEAL EUROPE

Global Travel Week

London 28-29 September

Join us at the New Deal Europe Pavilion:

- **Full attendance** at Global Travel Marketplace
- **A meeting diary** of pre-scheduled appointments & experiences
- **Comprehensive** content & educational programme
- Lunch & evening **networking receptions**
- An **invitation only** event

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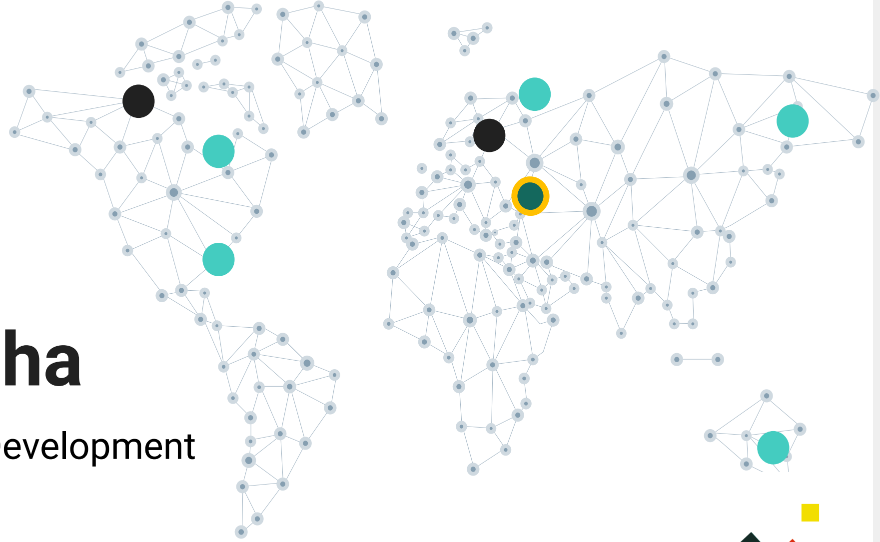
Travel Trends in The Balkan Region - report

MABRIAN
FULLCYCLE TRAVEL ANALYTICS

Anna Borduzha

Vice President Business Development
Mabrian Technologies



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MABRIAN

South East Europe

Insights on South East Europe Summer Recovery 2022

May 2022

Mabrian provides answers to key questions

In 6 main areas of destination management and marketing by using Big Data

Travel Intelligence

- Demand & Targeting
- Air Access to Destination
- Branding & Communication
- Client Experience
- Destination Benchmarking
- Tourism Sustainability

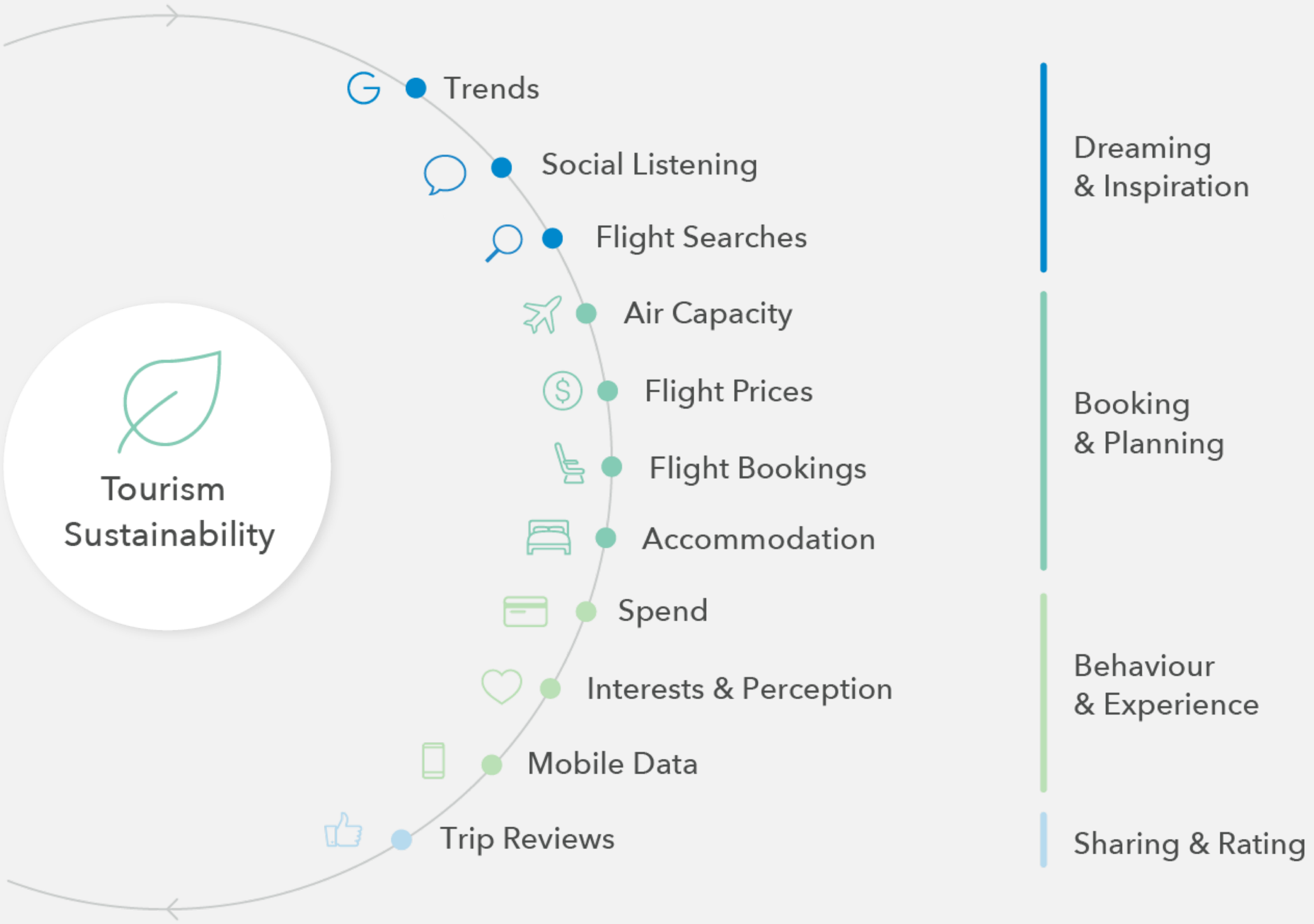
Strategic and operational planning

Monitoring of results

Multiple data analysis for a holistic view

We observe and record visitors' behaviour throughout all decision phases.
Pre-   During-   Post-Trip

From the inspirational moment for the trip, through flight searches and price comparison, flight bookings, all the way to behaviour and spend patterns at destination.



Incorporate data-driven decision culture into your organisation

We accompany our clients through an evolving process to incorporate information into their operational and strategic decision-making flows.

The importance of our sources

Our company only works with global and reliable data providers, ensuring the strict compliance of Personal Data Protection regulations.

Our global partnerships with data providers enable us to work with any destination in the world. From public to private sector, our services can be adapted to any organisation size: National, Regional and Local Tourism Organisations, Hotel Chains, Airlines, Investors, etc.

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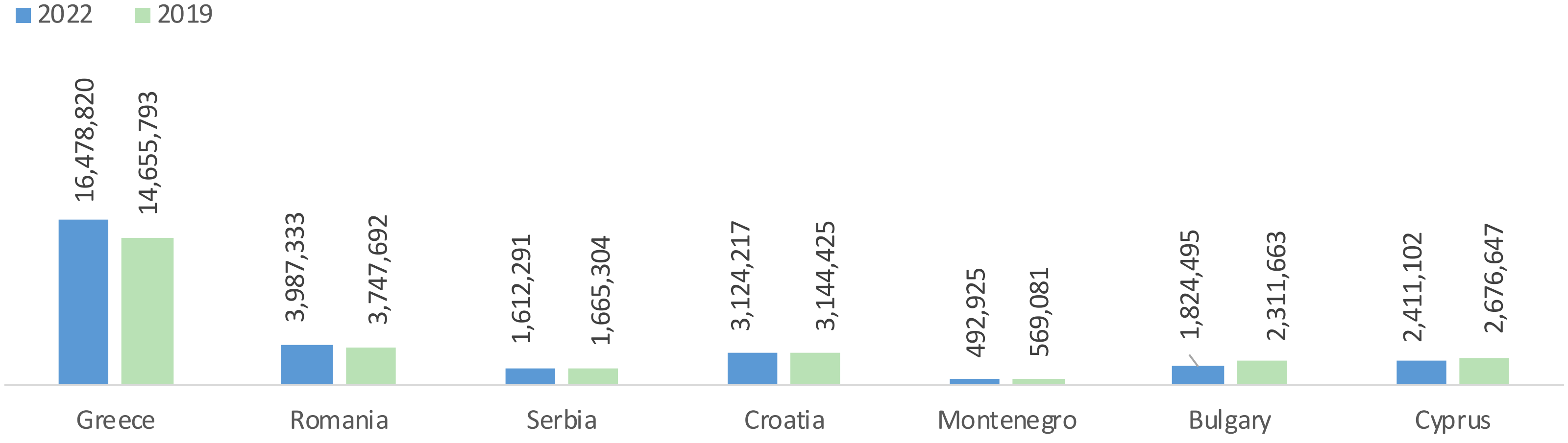
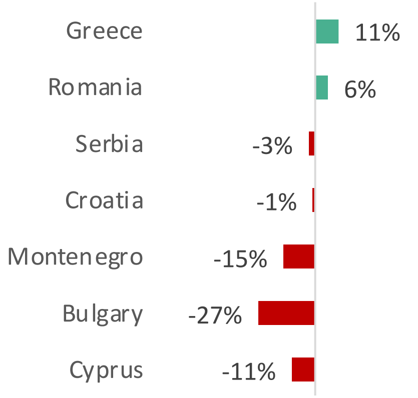
Overview of Air Capacity for East South Europe

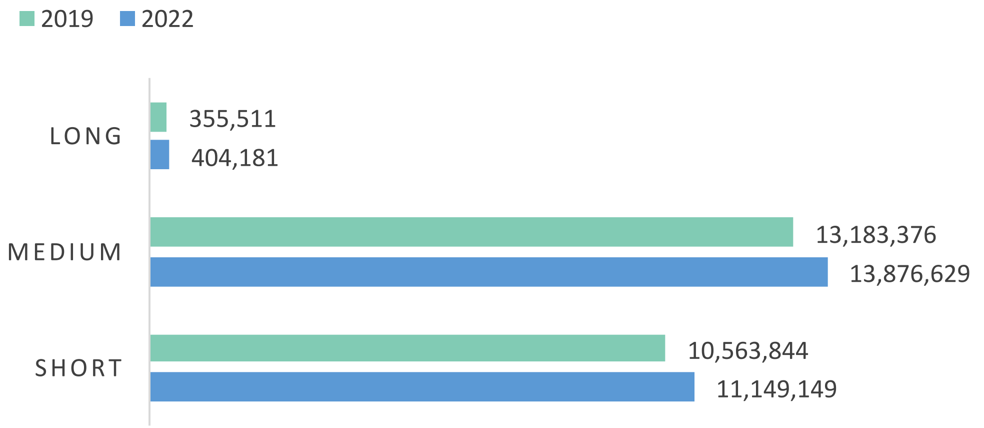
Air Capacity Evolution
Travel Date: 1 of June to 31st of August



Air Capacity Evolution YOY%
Travel Date: 1 of June to 31st of August



Seat Capacity Based on type of flight
Travel Date: 1 of June to 31st of August



Overall situation: pre-pandemic air capacity is being slowly reached. However, we identify 3 groups of countries meaning that recovery is very heterogeneous within South East of Europe:

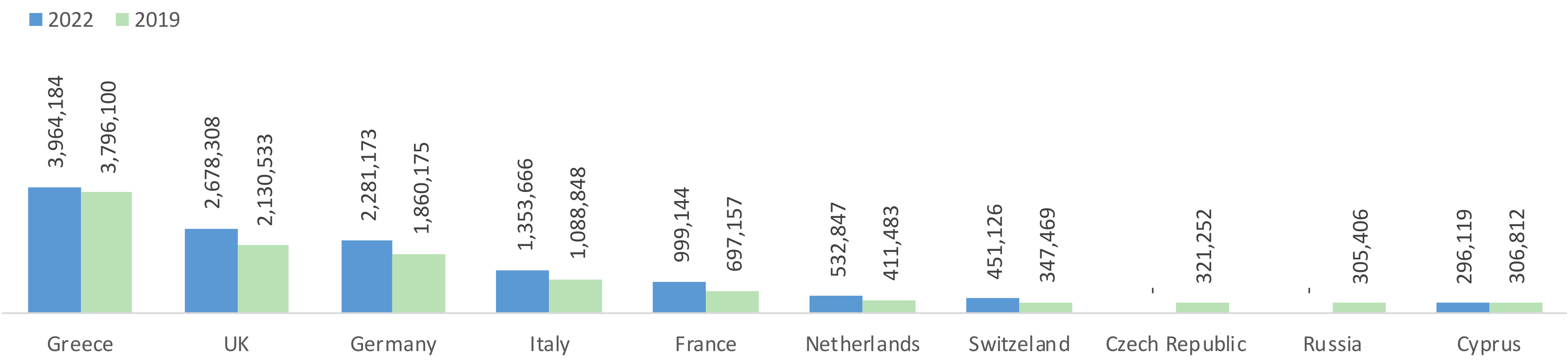
- High level of recovery: Greece, Romania
- Medium level of recovery: Serbia, Croatia
- Low level of recovery: Montenegro, Bulgaria, Cyprus

Capacity is increasing in all types of flights.
However, the increase in long Haul flights is due to the rise in capacity for Greece from US market and for Montenegro from Kazakhstan

Air Capacity with Source Markets for East South Europe

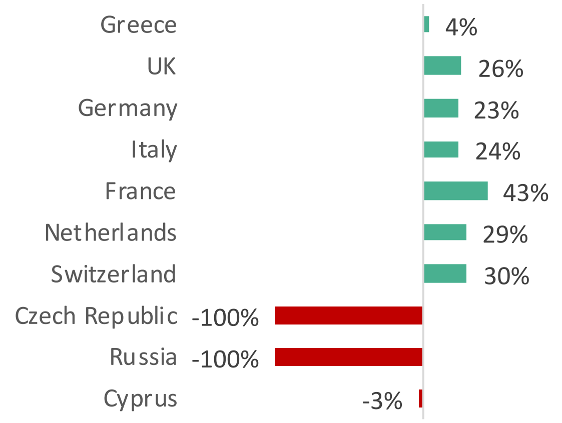
GREECE Direct Air Capacity seats – TOP 10 SOURCE MARKETS

Travel Date: 1 of June to 31st of August



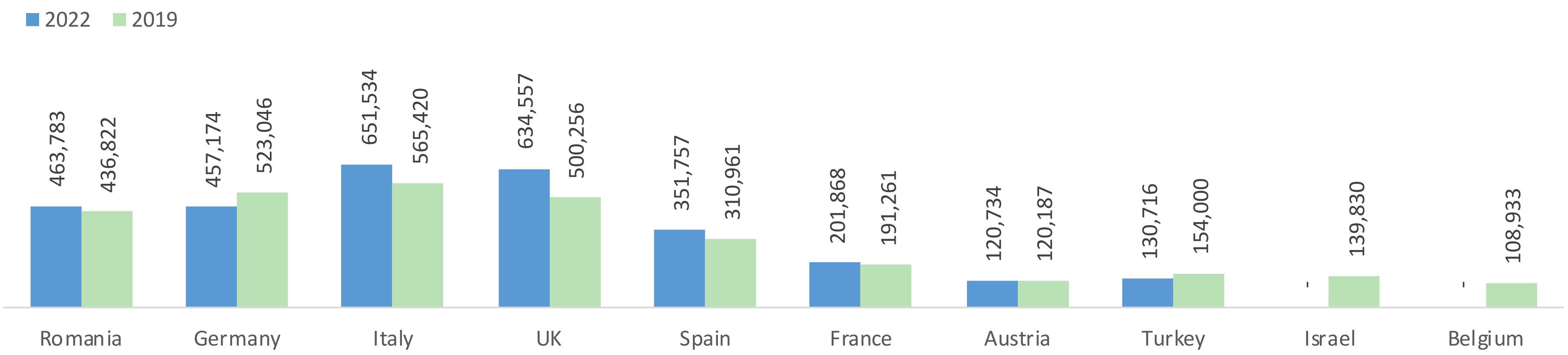
YOY% 2022 - 2019

Travel Date: 1 of June to 31st of August



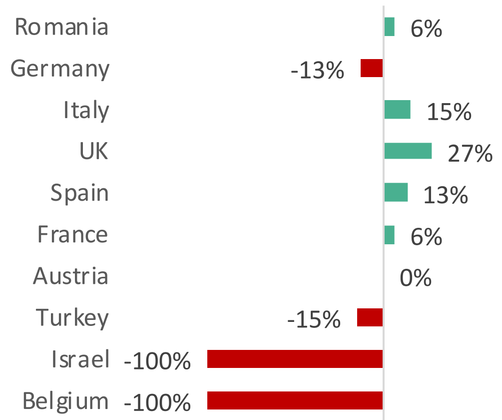
ROMANIA Direct Air Capacity seats – TOP 10 SOURCE MARKETS

Travel Date: 1 of June to 31st of August



YOY% 2022 - 2019

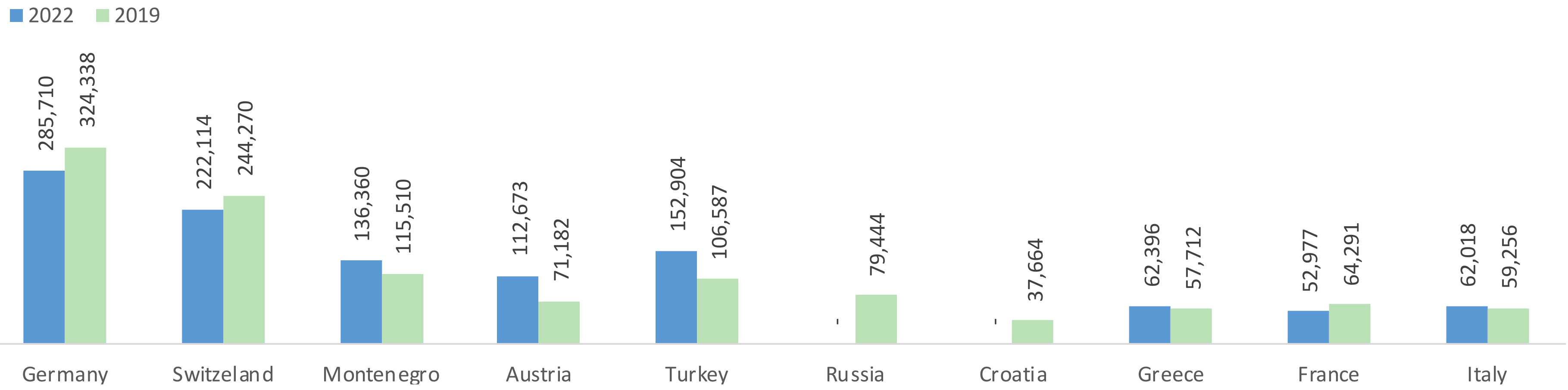
Travel Date: 1 of June to 31st of August



Air Capacity with Source Markets for East South Europe

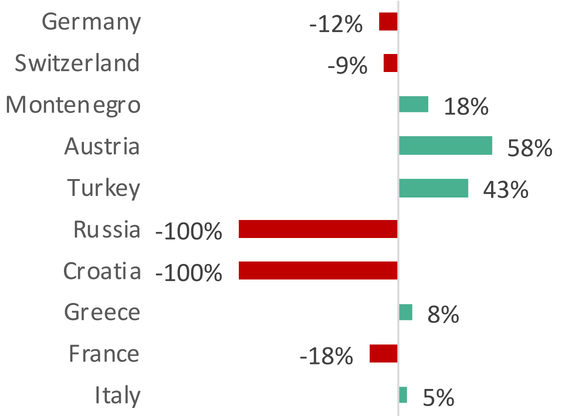
SERBIA Direct Air Capacity seats – TOP 10 SOURCE MARKETS

Travel Date: 1 of June to 31st of August



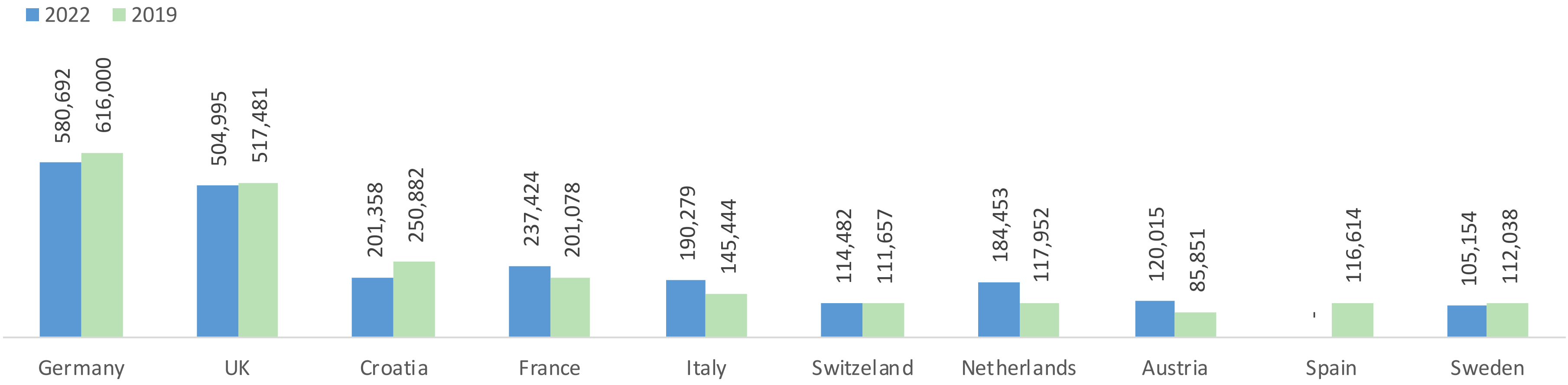
YOY% 2022 - 2019

Travel Date: 1 of June to 31st of August



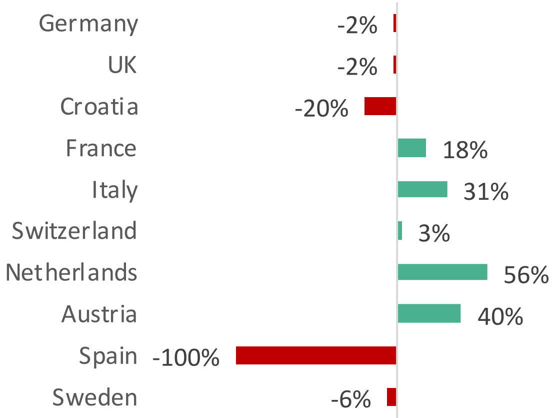
CROATIA Direct Air Capacity seats – TOP 10 SOURCE MARKETS

Travel Date: 1 of June to 31st of August



YOY% 2022 - 2019

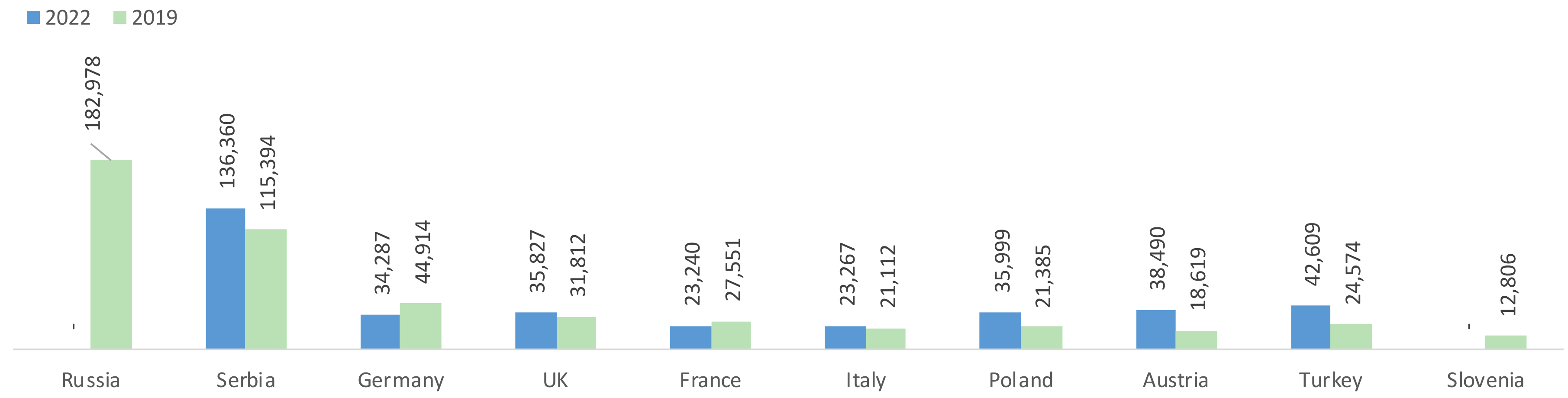
Travel Date: 1 of June to 31st of August



Air Capacity with Source Markets for East South Europe

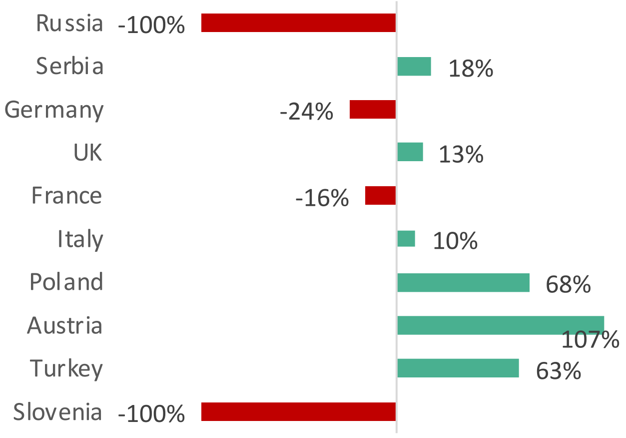
MONTENEGRO Direct Air Capacity seats – TOP 10 SOURCE MARKETS

Travel Date: 1 of June to 31st of August



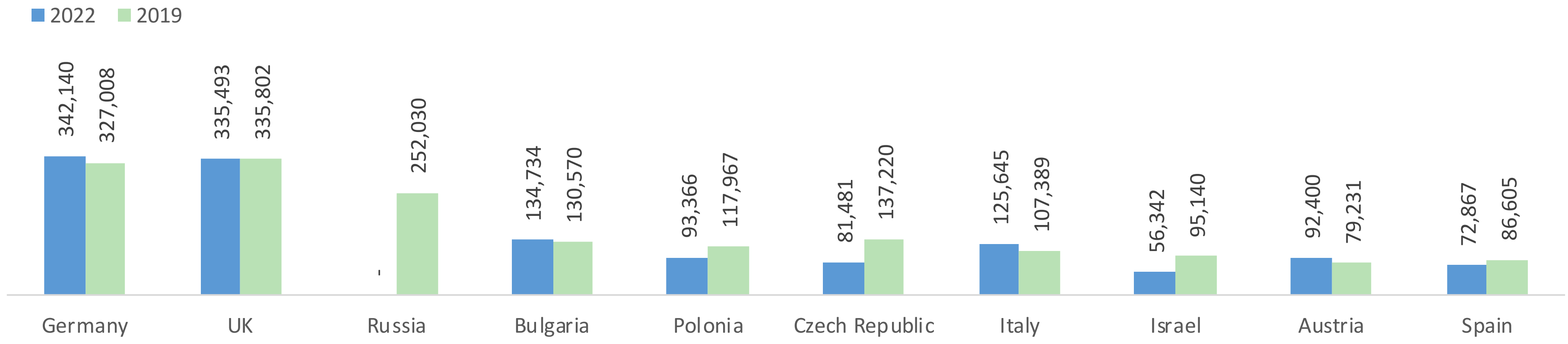
YOY% 2022 - 2019

Travel Date: 1 of June to 31st of August



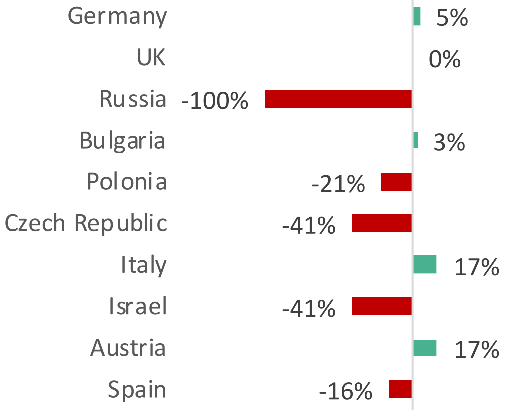
BULGARIA Direct Air Capacity seats – TOP 10 SOURCE MARKETS

Travel Date: 1 of June to 31st of August



YOY% 2022 - 2019

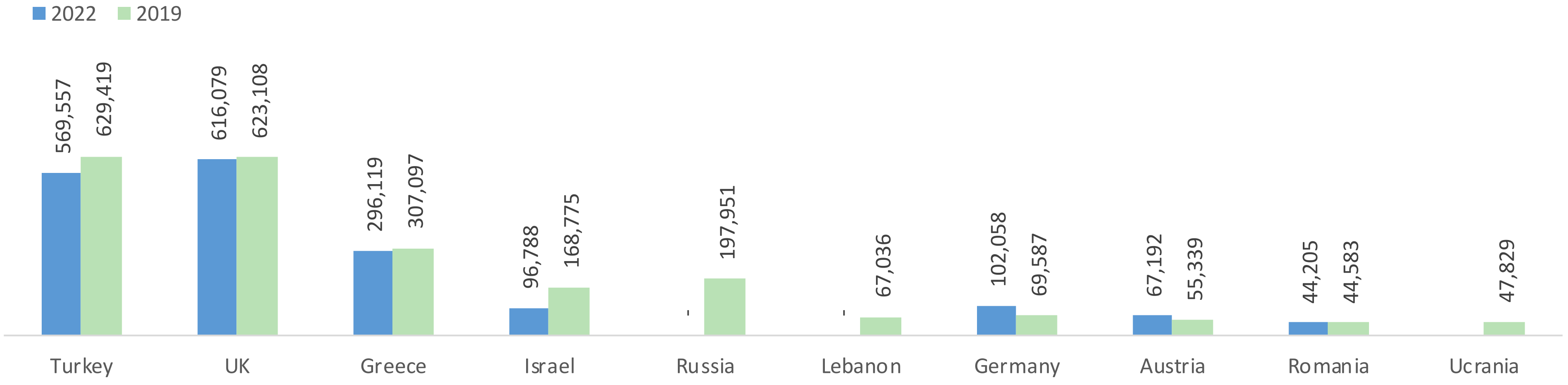
Travel Date: 1 of June to 31st of August



Air Capacity with Source Markets for East South Europe

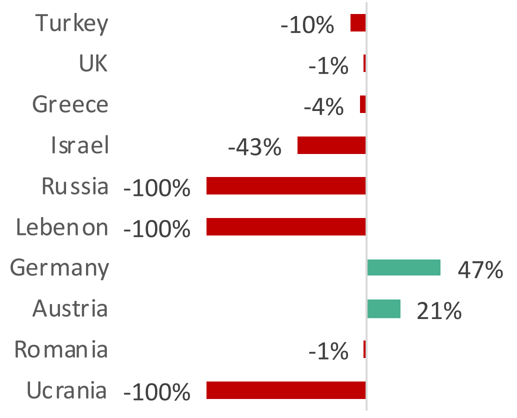
CYPRUS Direct Air Capacity seats – TOP 10 SOURCE MARKETS

Travel Date: 1 of June to 31st of August



YOY% 2022 - 2019

Travel Date: 1 of June to 31st of August



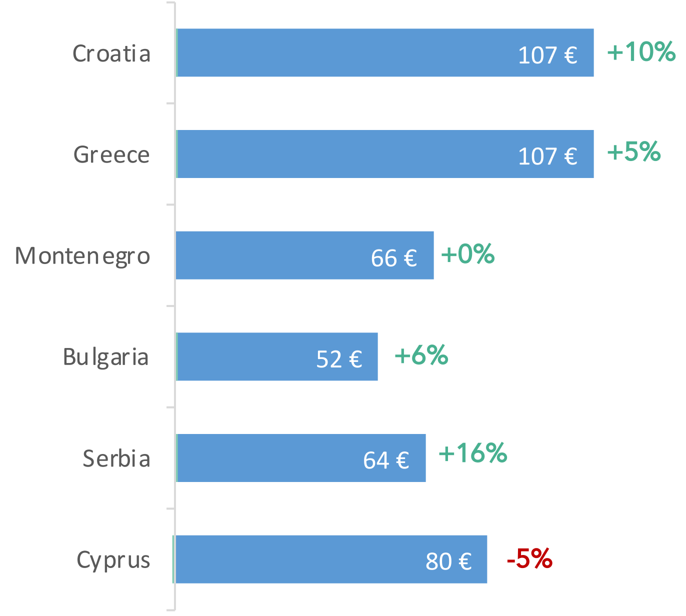
General insights for all markets

- The western European markets are the main markets and the ones that show the increase in the capacity in all destinations
- The exception is the German market which shows a decrease in the capacity in all destinations besides Greece, Cyprus, and Bulgaria
- The capacity for Russian Federation dropped by 100%

Accommodation Price Evolution Summer 2022 – South East Europe

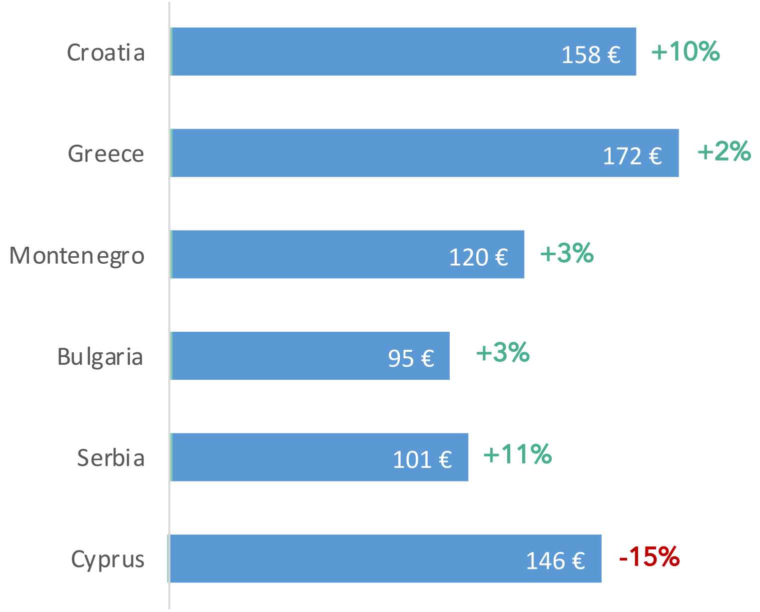
3 * Hotel Prices

Travel Date: 1 of June to 31st of August 2022 vs 2021



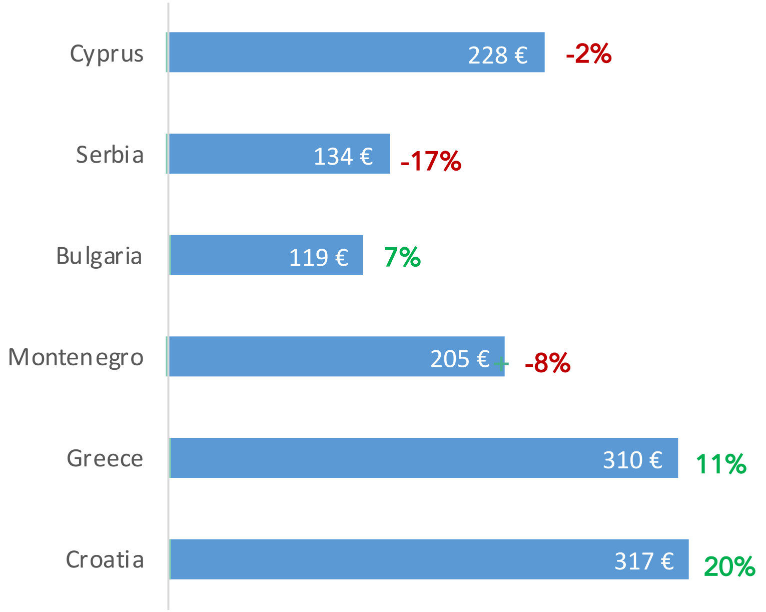
4 * Hotel Prices

Travel Date: 1 of June to 31st of August 2022 vs 2021



5 * Hotel Prices

Travel Date: 1 of June to 31st of August 2022 vs 2021



- Prices recovery has come to the hospitality sector and it is especially the case within the 4* properties. Croatia, Greece & Bulgaria show an increase in prices in all kinds of hotel categories while Cyprus is the only listed country that displays negative growth in 3*, 4* & 5* hotels.
- Cyprus: In 2021, Russia was the third market in terms of air capacity and the second in hotel reviews. The lack of Russian tourists for next summer is a strong pain point for this destination.
- The same concern can be highlighted in Serbia & Montenegro. In terms of hotel reviews, Russia was classified as the 3rd market for Montenegro and 4th for Serbia. The absence of Russian guests might affect the prices of luxury properties.

Summer demand by source market

MONTENEGRO

Share of Flight Search Index*	Length of Stay in days	2021 vs 2022
Germany	11.8	+7,9%
Russian Fed.	13	+8,4%
UK	7.8	-18%
France	9.8	-3,7%
US	14.3	+22%

CROATIA

Share of Flight Search Index*	Length of Stay in days	2021 vs 2022
UK	7	-14,7%
Germany	9.1	-11,6%
France	8.1	-11,6%
Italy	7.1	-24,7%
Poland	8.3	-9,8%

GREECE

Share of Flight Search Index*	Length of Stay in days	2021 vs 2022
Italy	7.9	-7.3%
Germany	10.9	-12%
UK	8.5	-7.7%
US	12.3	-5,4%
France	8.8	-4,2%

Travel date: from June to August /Searches from January to April 2022 vs. 2021

- Average length of stay in Croatia of 8 days, which is lower than Montenegro (-20%) and Greece (-11%). Hotel prices of Croatians 3* & 4* properties are the second-highest in the region which can interfere with inspirational demand
- Overall Greece: Length of Stay is decreasing as hotel prices have risen vs 2021 (specially in 5* properties, by 10%) and are the highest in southeast Europe
- UK Origin Market: Besides a drop in searches, British are also shortening their length of stay

Let’s talk

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Join us on New Deal Europe Viber Group

Scan QR to join!

Or type: rb.gy/xjl129

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