



Overlook 2023

**Croatia, Slovenia, Albania, Bulgaria, Romania, Serbia,
Montenegro, Moldova and Greece**

March 2023

Your partner to analyse and anticipate tourism trends

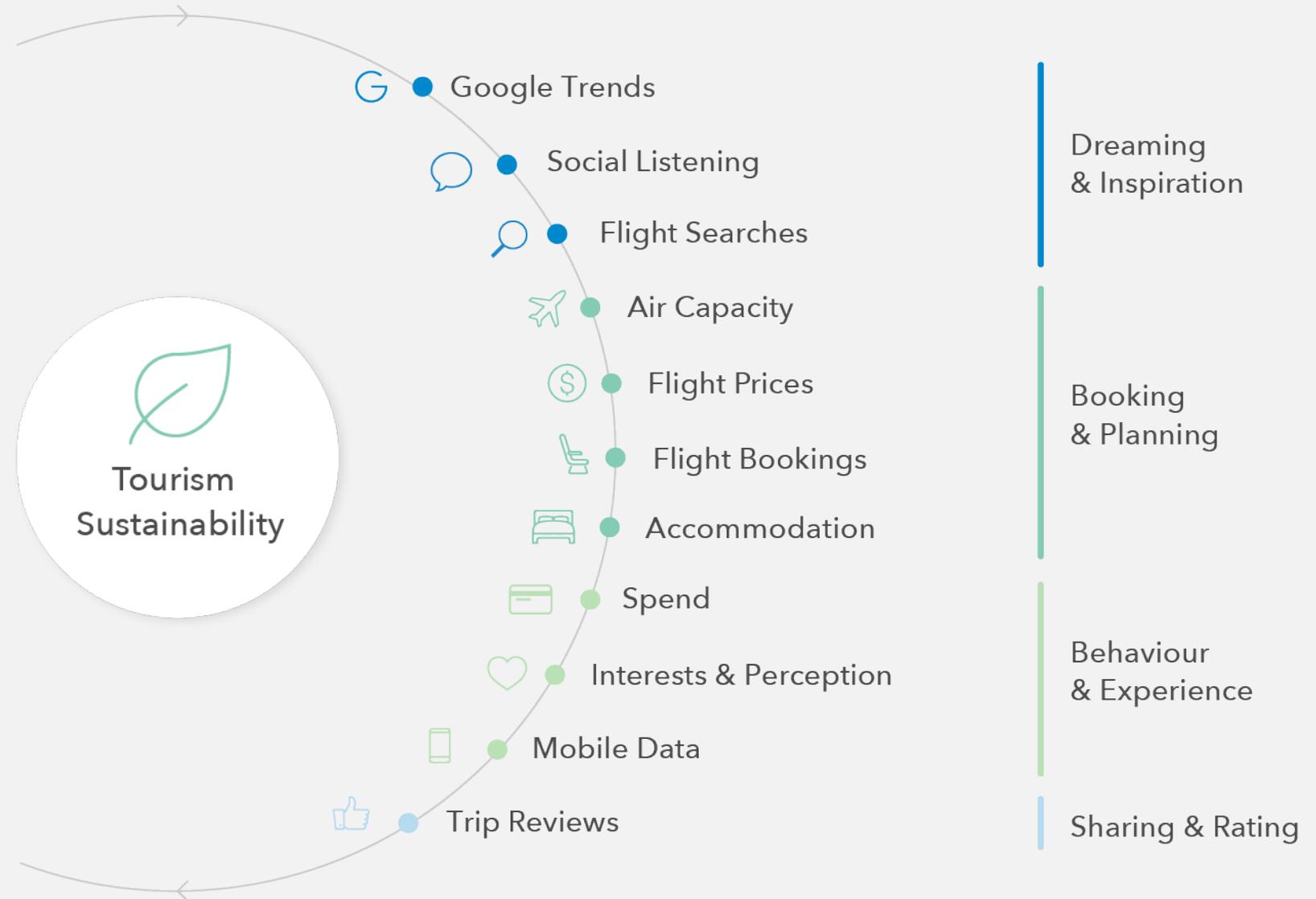


Multiple data analysis for a holistic view

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.





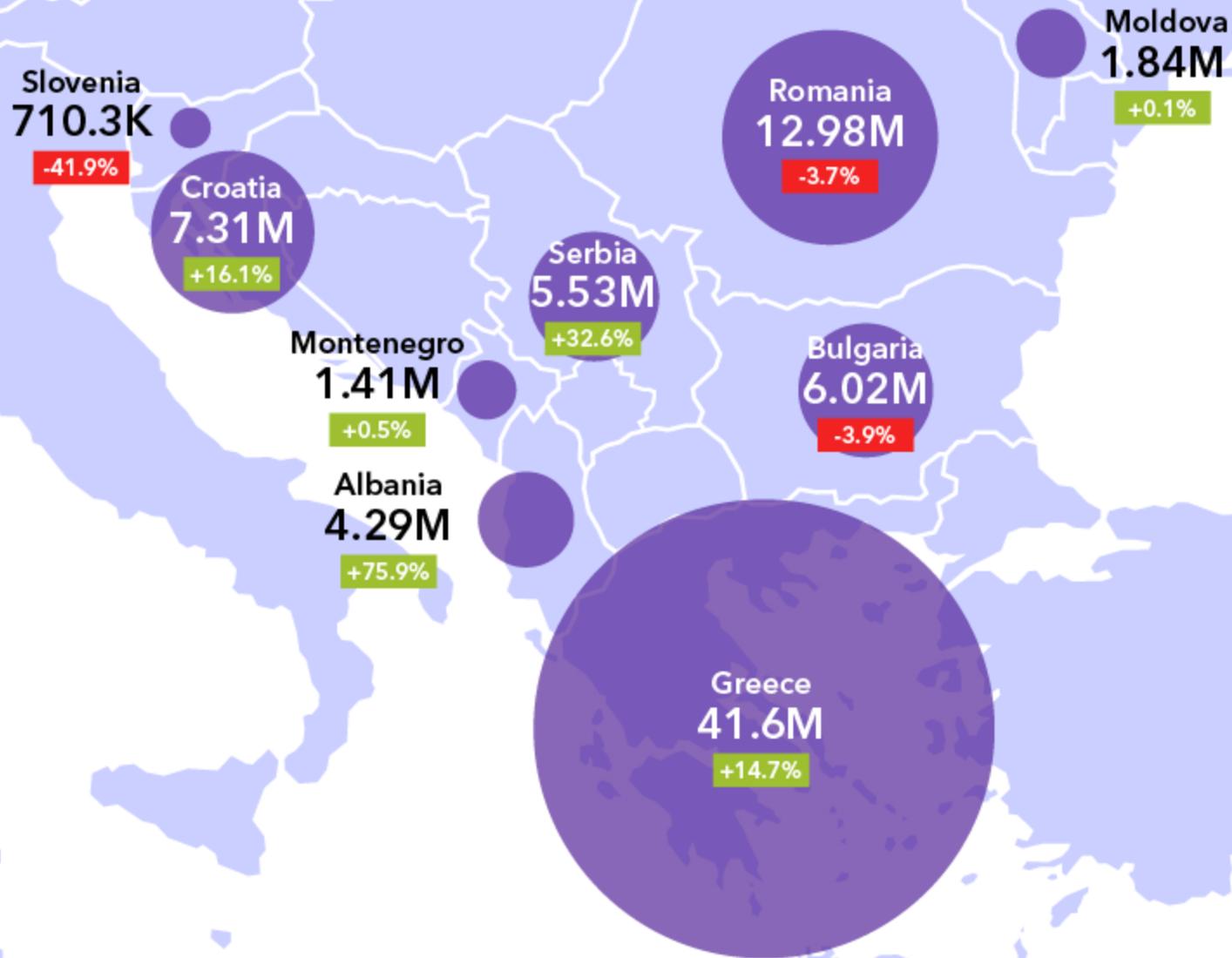
Incorporate data-driven decision culture into your organisation

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



Air Connectivity 2023 vs 2019 of South East Europe destinations

Flight schedule from 01 January 2023 and 31 December 2023 vs. 2019 Source: Mabrian Technologies Travel Intelligence



Air Connectivity 2023 vs 2019

Flight schedule from 01 January 2023 and 31 December 2023 vs. 2019 Source: Mabrian Technologies Travel Intelligence

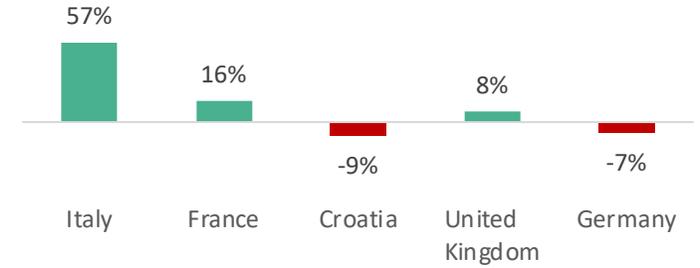
Croatia



Seats

7.31 M

+16.1%



Romania



Seats

12.98M

-3.7%



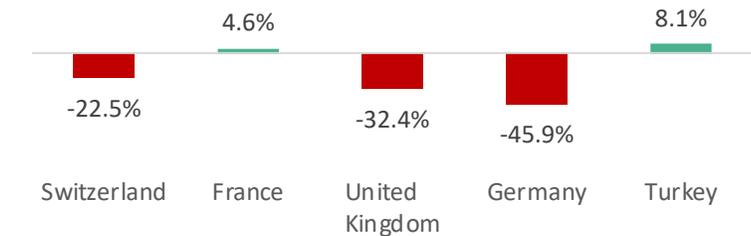
Slovenia



Seats

710.3 K

-41.9%



Air Connectivity 2023 vs 2019

Flight schedule from 01 January 2023 and 31 December 2023 vs. 2019 Source: Mabrian Technologies Travel Intelligence

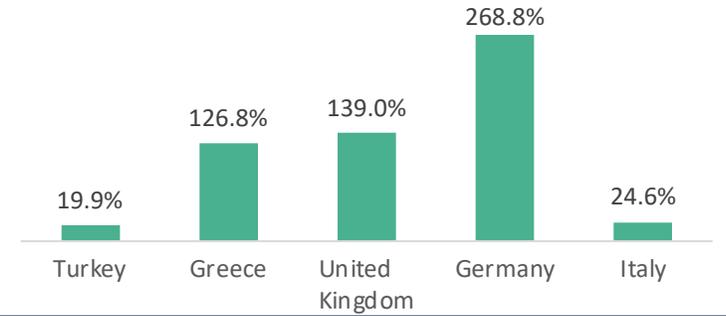
Albania



Seats

4.29 M

+75.9%



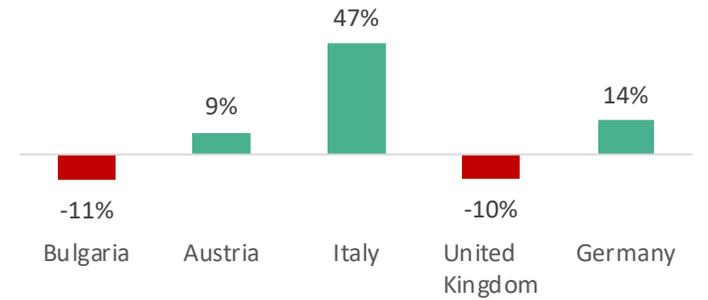
Bulgaria



Seats

6.02M

-3.9%



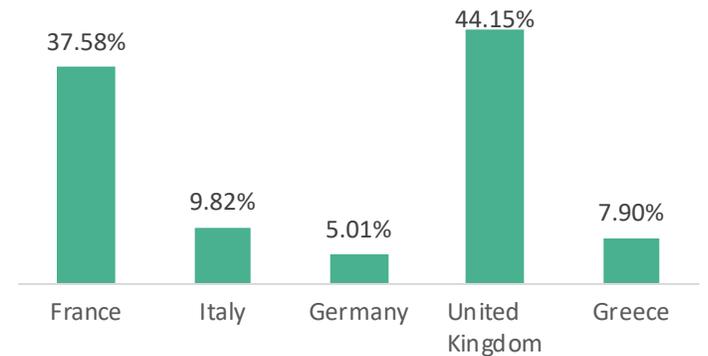
Greece



Seats

41.6 M

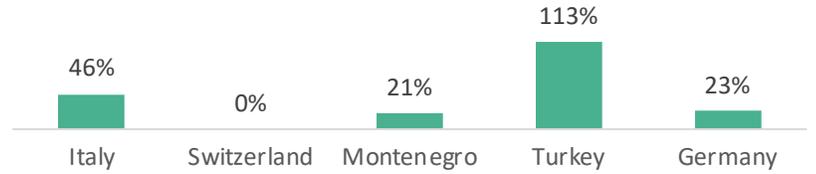
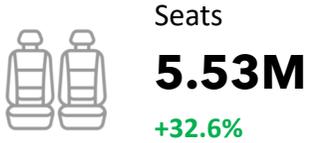
+14.7%



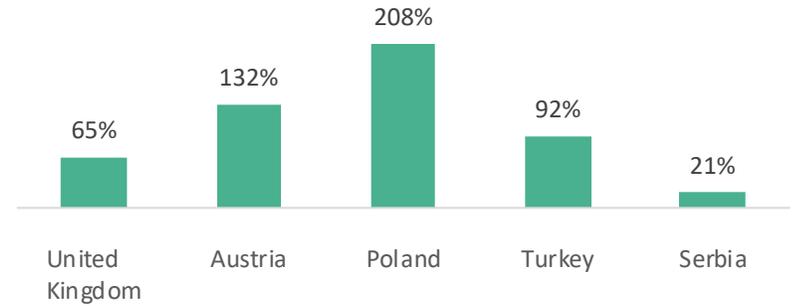
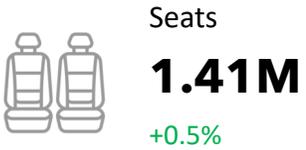
Air Connectivity 2023 vs 2019

Flight schedule from 01 January 2023 and 31 December 2023 vs. 2019 Source: Mabrian Technologies Travel Intelligence

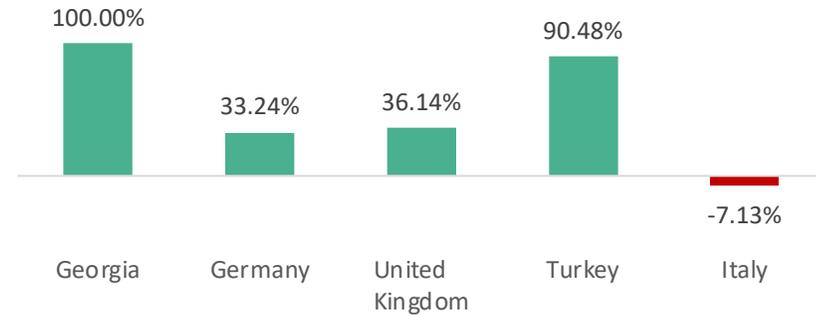
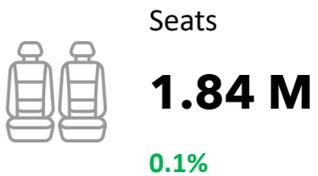
Serbia



Montenegro



Moldova



Accommodation Price Evolution Summer 2023 vs 2022

Average price per night, double room, weekends, breakfast excluded, period from 02 January 2023 and 16 August 2023 vs. 2022 Source: Mabrian Technologies

Hotel 3 *

Hotel 4 *

Hotel 5 *

2023		2022	2023		2022	2023		2022
Greece	107 €	10.6%	Greece	166 €	11.4%	Greece	281 €	10.6%
Slovenia	107 €	9.3%	Croatia	150 €	18.1%	Croatia	257 €	13.7%
Croatia	103 €	13.7%	Slovenia	144 €	10.8%	Slovenia	233 €	9.3%
Serbia	73 €	10.2%	Serbia	112 €	15.5%	Serbia	221 €	41.7%
Montenegro	65 €	21.7%	Montenegro	103 €	6.2%	Montenegro	220 €	14.6%
Bulgaria	57 €	16.8%	Bulgaria	97 €	19.8%	Bulgaria	125 €	16.80%
Albania	51 €	6.3%	Albania	71 €	-4.1%	Albania	119 €	6.3%



Connectivity Assessment

Connectivity

Croatia, Greece, Serbia and Albania have overcome the number of 2019. The main growth comes from international flights, which confirms that international travelling will continue to recover during 2023.

Albania stands out with an increase of 75% in international flights compared to the pre-pandemic year.

Bulgaria is getting closer to the volumes of 2019 also with better signs of recovery for international flights than for domestic.

Slovenia still needs to recover the connectivity for 2023 the scheduled flights represent just 58% of the 2019 ones.

Moldavia and Montenegro have reached and slightly overcome the figures of 2019 however there are important changes in the capacity of the main markets

Accommodation Prices

The hotel rates continue to go up for all destinations and categories. The destination with higher increases in prices regard to 2022 are Bulgaria, Serbia and Croatia.



Connectivity Assessment per market

Destination accessibility is one of the most important factors that travelers consider when choosing their next travel destination

Croatia

The destination has improved significantly the direct connectivity with Italy, the main international market, with 57% more seats available on the scheduled flight however the Domestic and German markets are under the numbers of 2019.

Romania

Romania,

The international demand overtakes the volumes of 2019 when the domestic one is 43% below. Italy and the UK have improved their connectivity while Germany and Spain are still 20,9% and 2.83% below the pre-pandemic figures.

Slovenia

The air connectivity hasn't reached the numbers of 2019, the main markets: Germany, UK and Switzerland are between 22% and 46% have less capacity when France and Turkey slightly increased their connectivity.

Albania

There is a rise of 75% in international air connectivity, with more capacity and with new direct routes that connect the markets with the destination

The main increase is with Germany, UK and Greece with a growth of 268%, 139% and 126% respectively.



Greece

The destination has increased its capacity for both international and domestic flights. The top 5 origin markets increased their capacity for the current year, French and UK markets, stand out with 37.6% and 44% of the increase

Moldova

The destination has reached the numbers of 2019 and even shows a slight growth. Turkey and George have increased their capacity by more that 90% while Germany and the UK have a growth of more than 30% however Italy is 7% below the 2019 figures

Serbia

There is a significant growth in capacity for both domestic and international markets.

From the international markets, the main growth comes from Turkey with an increase of 113% followed by Italy with 46% more programmed seats.

Montenegro

The destination showed a slight increase in the capacity that comes from international flights. The top 5 main international markets by capacity show important growth, Poland, Austria and Turkey have increased their connectivity by 208%, 113% and 92% respectively.

Bulgaria

Although the capacity volumes are still not reaching the pre-pandemic some of the international markets are raised their connectivity, Italy with 47% more scheduled seats for 2023 followed by Germany and Austria with a rise of 14% and 9% respectively.

Let's talk !

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