



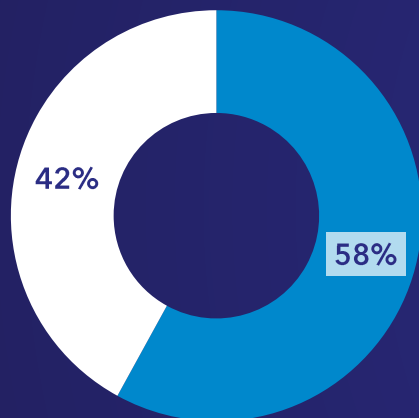
**Travel Intelligence analysis:**  
**Low season opportunities**  
**Croatia and the Mediterranean**

Tourism 365 Conference  
**October 2023, Tuheljske Toplice**

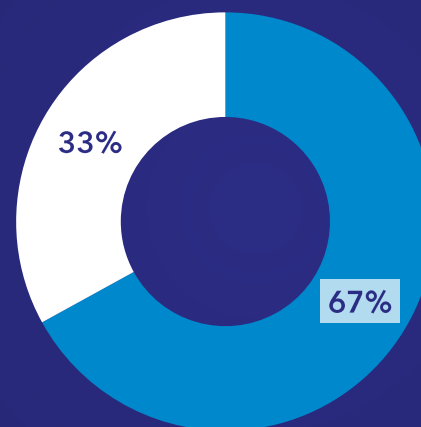
Low season opportunities for Croatia and the Mediterranean

# The Southeast Mediterranean region is highly seasonal

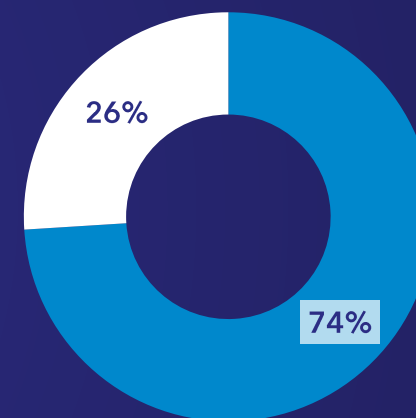
Seasonality in the nearby Mediterranean



Seasonality in the Southeast Mediterranean



Seasonality in Croatia

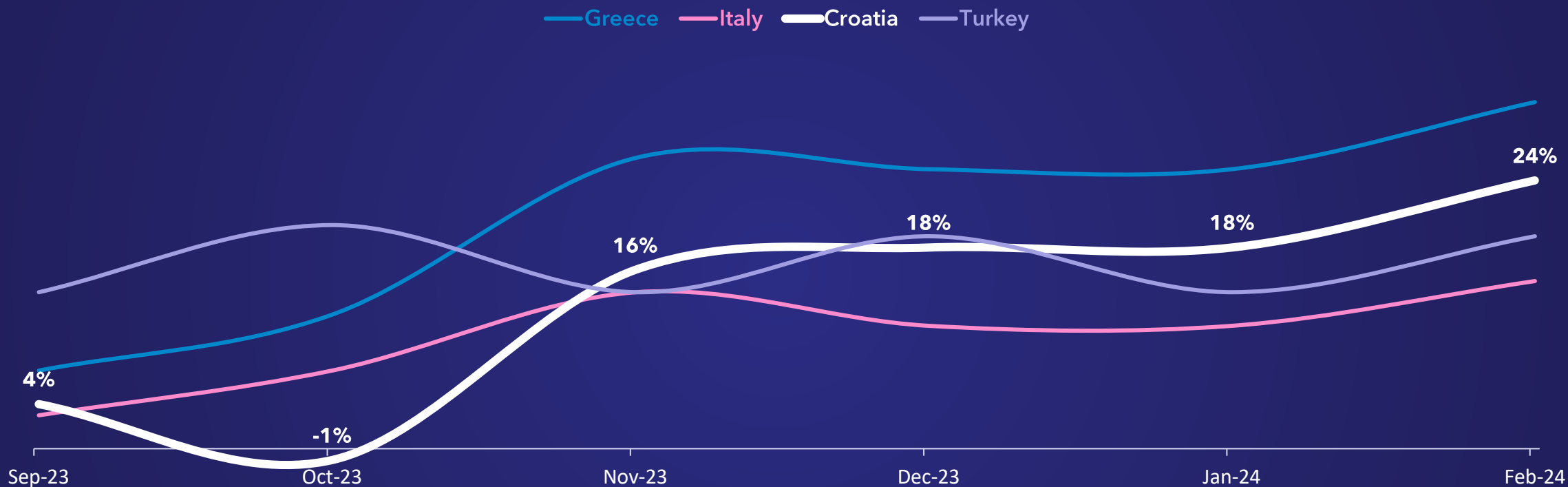


■ Spring-Summer ■ Autumn-Winter

**GREAT ROOM FOR GROWTH IN THE LOW SEASON**

Low season opportunities for Croatia and the Mediterranean

# Off-season tourism forecast: activity share 23 vs 22

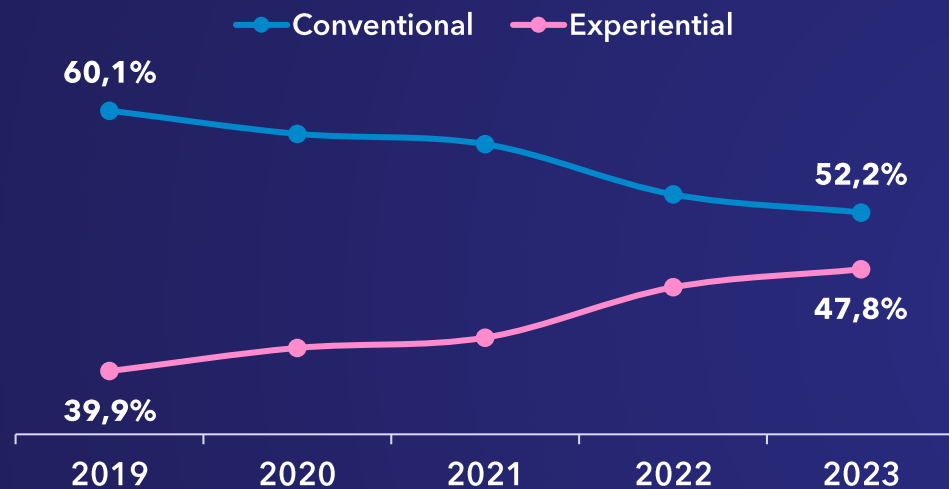


**10% AVERAGE GROWTH IN CROATIA**

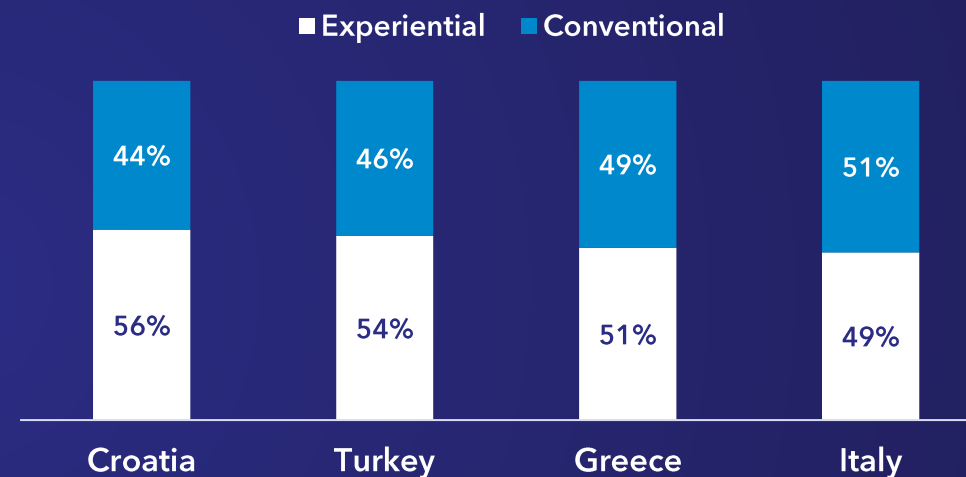
Low season opportunities for Croatia and the Mediterranean

# What are travellers looking for?

Global evolution of travel motivations



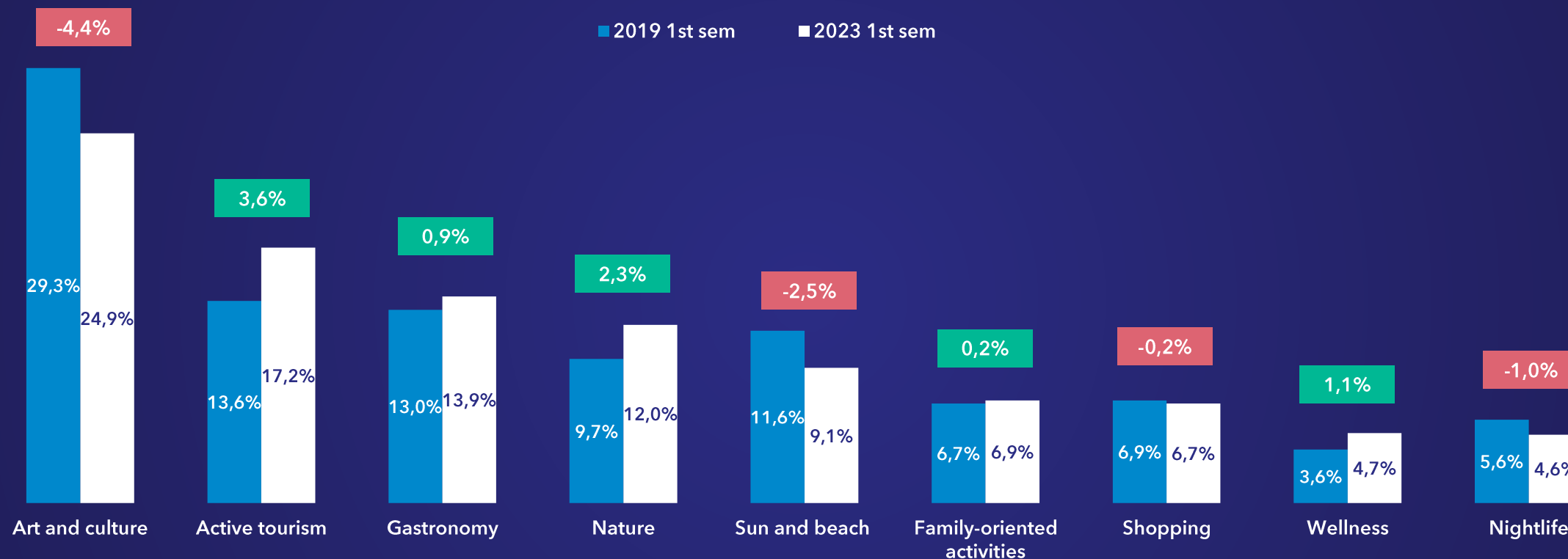
Off-season travel motivations



**TRAVELLER MOTIVATIONS ARE SHIFTING FROM CONVENTIONAL TO EXPERIENTIAL ACTIVITIES**

Low season opportunities for Croatia and the Mediterranean

# What are travellers looking for?

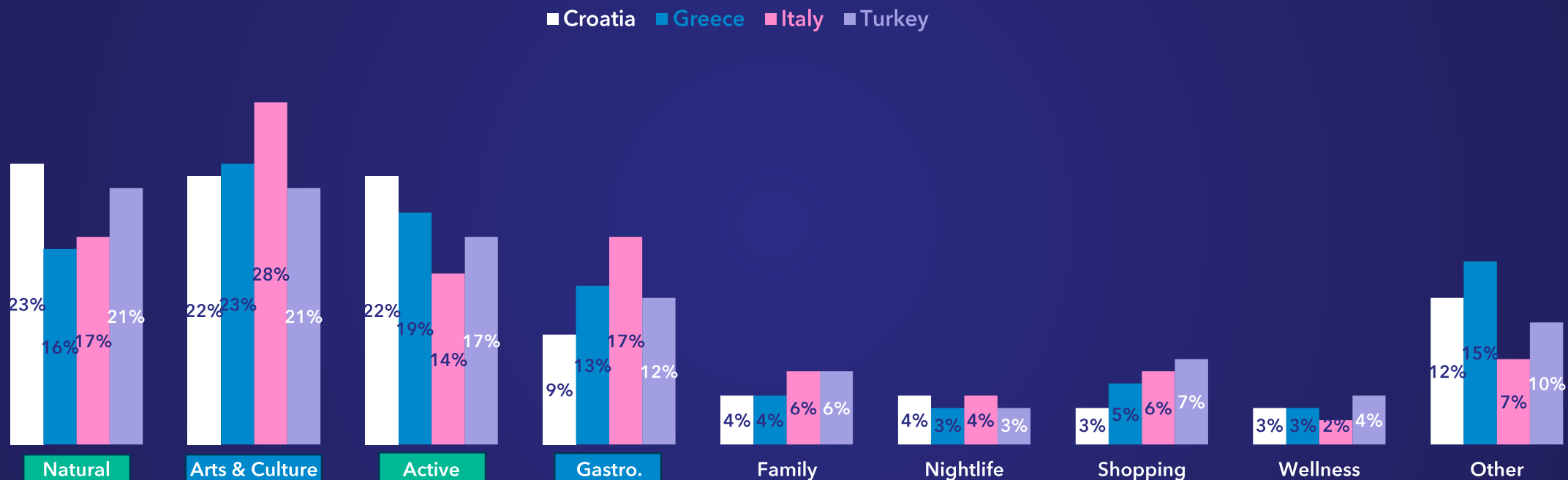


**MORE ACTIVE AND NATURE ACTIVITIES VS CULTURAL AND SUN & BEACH**

Low season opportunities for Croatia and the Mediterranean

# Croatia's strengths and opportunities

Interest in tourist products from October 2022 to March 2023



**CROATIA IS WELL POSITIONED TO TACKLE THE LOW SEASON GROWTH**

## Low season opportunities for Croatia and the Mediterranean

# Focus points: main targets and partners

### To consolidate the strengths

### To seize opportunities

	 <b>Germany</b>	 <b>Netherlands</b>	 <b>Italy</b>	 <b>United Kingdom</b>	 <b>France</b>	 <b>USA</b>
<b>Interest share</b>	24% in Nature & Active tourism	25% in Nature & Active tourism	31% in Nature & Active tourism	51% in Culture and Gastro tourism	46% in Culture and Gastro tourism	49% in Culture and Gastro tourism
<b>Market position by air connectivity</b>	1st (growing 10%)	3rd	7th	2nd	4th (growing +11%)	No direct connectivity. +80% with stopover
<b>Position by Spend</b>	2nd European market	In the top 10 European markets	In the top 10 European markets	1st European market	2nd in restaurants	Overall 1 <sup>st</sup> (+60% above the average)



**Let's talk!**

**Carlos Cendra**  
Chief Marketing &  
Communications Officer

[carlos@mabrian.com](mailto:carlos@mabrian.com)  
[www.mabrian.com](http://www.mabrian.com)