

Current situation - Organised BE Travel Market - Final 2023

Turnover

Source: TravelNote Trends - Final figures 2023 vs. previous years



Current situation - Global BE Travel Market - Final 2023

Number of trips (pax) & Retail value

Source: Euromonitor - BE residents domestic and outbound departures - full year 2023



Growth Source: Euromonitor – M: million / B: billion – forecast 2023 and 2024 – Trips & Retail Sales Price (RSP)

		2018	2019	2020	2021	2022	2023	2024	% Y23 vs. Y22	% Y23 vs. Y19
Total Trips		34,4 M	35,5 M	17,6 M	23,6 M	33,9 M	37,2 M	40,4 M	10%	5%
Domestic Tourism	RSP	3,6 B	3,7 B	2,5 B	3,0 B	3,3 B	3,5 B	3,7 B	8%	-6%
Domestic Tourism	Trips	7,8 M	8,2 M	5,2 M	6,5 M	7,7 M	8,4 M	8,8 M	8%	2%
Outbound Departures	RSP	19,9 B	20,4 B	9,3 B	13,5 B	23,4 B	27,5 B	31,6 B	17%	34%
Outbound Departures	Trips	26,5 M	27,2 M	12,4 M	17,1 M	26,1 M	28,8 M	31,6 M	10%	6%

Top 5 Destinations

Source: Euromonitor - Outbound departures per country

Inside Europe



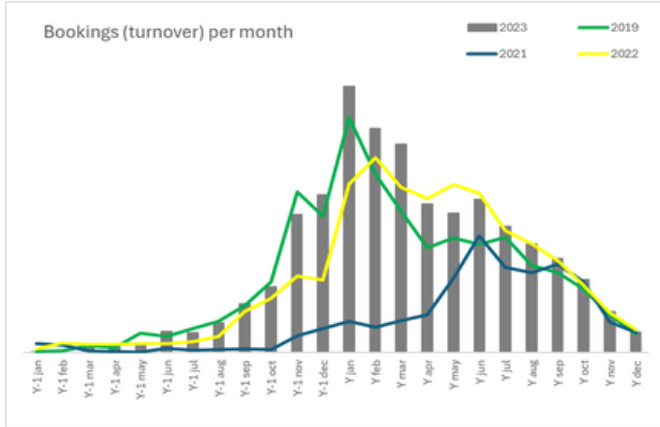
Outside Europe (% x 10)



Current situation - Organised BE Travel Market - Final 2023

Time of booking - Final 2023

Source : TravelNote Trends - Turnover for departures in 2023 vs. previous years (all bookings)



Booking window - Final 2023

Source : TravelNote Trends - Booking window for departures in 2023 (all bookings)



Bookings per target group - Final 2023

Source : TravelNote Trends - Bookings per target group for departures in 2023 (all bookings)

	2019	2021	2022	2023
Couple	29%	34%	32%	34%
Family	27%	27%	29%	27%
Group	25%	23%	23%	24%
Single	20%	16%	15%	15%
	100%	100%	100%	100%

Top 5 Destinations Source: TravelNote Trends - share vs. total pax - final 2023

Short-Medium Haul

- 1 SP 20,8%
- 2 TR 9,4%
- 3 FR 8,7%
- 4 GR 6,4%
- 5 IT 6,0%

Long Haul

- 1 US 3,0%
- 2 CV 1,2%
- 3 UA 1,1%
- 4 MX 0,9%
- 5 TH 0,7%

Current situation - Organised BE Travel Market - YTD 2024

Turnover

Source: TravelNote Trends - year-to-date figures 2024 vs. previous years (Turnover until Jan/2024 - Week 05)

YTD 2024 vs. YTD 2023

+13 %

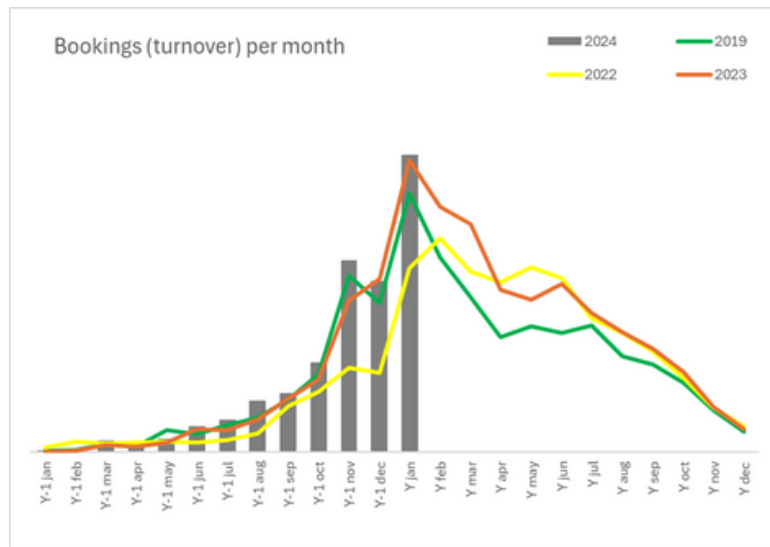


YTD 2024 vs. YTD 2019

+15 %

Time of booking - Final 2023

Source: TravelNote Trends - Turnover for departures in 2024 vs. previous years (bookings until Jan/2024 - Week 05)



Progression - Top 10 Destinations

Source: TravelNote Trends - Progression vs. last year - YTD 2024

1		SP	+21 %		6		AT	+2 %	
2		FR	+5 %		7		US	+25 %	
3		GR	+27 %		8		BE	-6 %	
4		TR	-8 %		9		PT	+22 %	
5		IT	-14 %		10		DE	+24 %	