

### Current situation - Organised BE Travel Market - Final 2024

#### Turnover

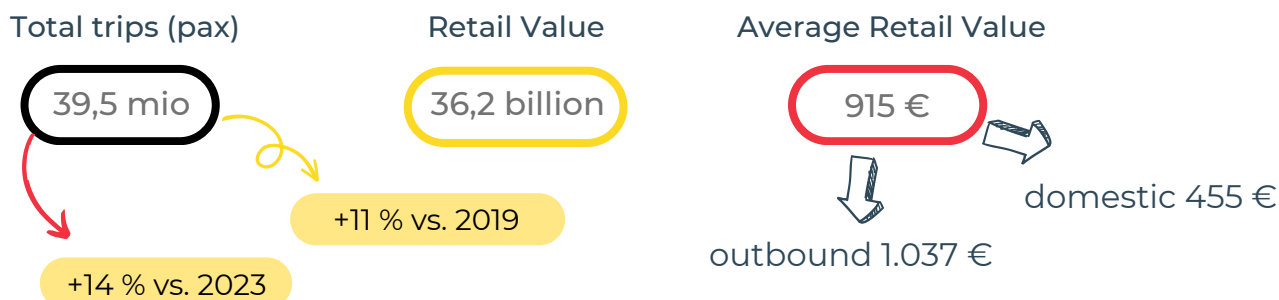
Source: TravelNote Trends - Final figures 2024 vs. previous years



### Current situation - Global BE Travel Market - Final 2024

#### Number of trips (pax) & Retail value

Source: Euromonitor - BE residents domestic and outbound departures - full year 2024



#### Growth Source: Euromonitor – M: million / B: billion – 2024 and forecast 2025 – Trips & Retail Sales Price (RSP)

| Category            |       | 2018   | 2019   | 2020   | 2021   | 2022   | 2023   | 2024   | 2025   | % Y24 vs. Y23 | % Y24 vs. Y19 |
|---------------------|-------|--------|--------|--------|--------|--------|--------|--------|--------|---------------|---------------|
| Total Trips         | Trips | 34,4 M | 35,5 M | 17,6 M | 22,3 M | 32,1 M | 34,7 M | 39,5 M | 41,4 M | 14%           | 11%           |
| Domestic Tourism    | RSP   | 3,6 B  | 3,7 B  | 2,5 B  | 3,0 B  | 3,3 B  | 3,5 B  | 3,8 B  | 4,0 B  | 7%            | 1%            |
| Domestic Tourism    | Trips | 7,8 M  | 8,2 M  | 5,2 M  | 6,5 M  | 7,7 M  | 8,4 M  | 8,3 M  | 8,8 M  | -2%           | 0%            |
| Outbound Departures | RSP   | 19,9 B | 20,4 B | 9,5 B  | 13,4 B | 22,6 B | 25,8 B | 32,4 B | 34,4 B | 26%           | 59%           |
| Outbound Departures | Trips | 26,6 M | 27,3 M | 12,4 M | 15,8 M | 24,4 M | 26,3 M | 31,3 M | 32,6 M | 19%           | 15%           |

#### Top 5 Destinations

Source: Euromonitor - Outbound departures per country

##### Inside Europe



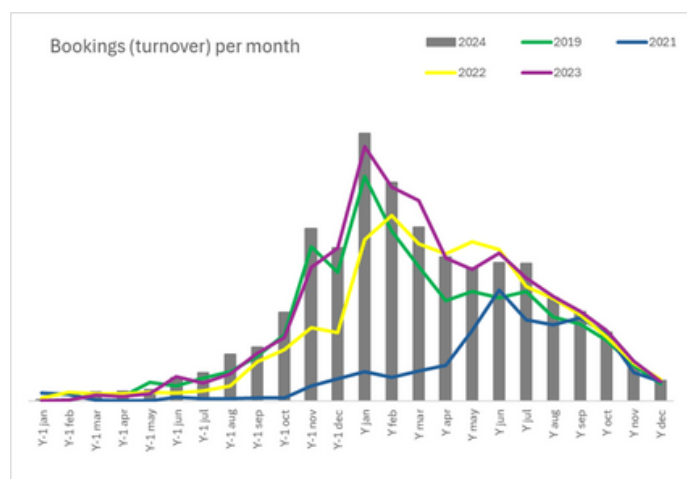
##### Outside Europe (% x 10)



### Current situation - Organised BE Travel Market - Final 2024

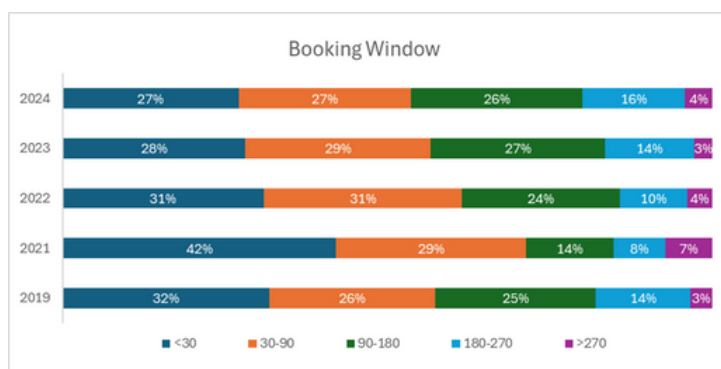
#### Time of booking - Final 2024

Source : TravelNote Trends - Turnover for departures in 2024 vs. previous years (all bookings)



#### Booking window - Final 2024

Source : TravelNote Trends - Booking window for departures in 2024 (all bookings)



#### Bookings per target group - Final 2024

Source : TravelNote Trends - Bookings per target group for departures in 2024 (all bookings)

|        | 2019 | 2021 | 2022 | 2023 | 2024 |
|--------|------|------|------|------|------|
| Couple | 29%  | 34%  | 32%  | 33%  | 34%  |
| Family | 27%  | 27%  | 29%  | 27%  | 28%  |
| Group  | 25%  | 23%  | 24%  | 24%  | 24%  |
| Single | 20%  | 16%  | 15%  | 15%  | 15%  |

#### Top 5 Destinations Source: TravelNote Trends - share vs. total pax - final 2024

##### Short-Medium Haul

- 1  SP 21,6%
- 2  TR 8,7%
- 3  FR 8,1%
- 4  GR 6,7%
- 5  IT 6,2%

##### Long Haul

- 1  US 3,1%
- 2  UA 1,2%
- 3  CV 1,0%
- 4  MX 0,9%
- 5  TH 0,8%

### Current situation - Organised BE Travel Market - YTD 2025

#### Turnover

Source: TravelNote Trends - year-to-date figures 2024 vs. previous years (Turnover until Feb/2025 - Week 09)

YTD 2025 vs. YTD 2024

+ 8,8 %

+ 3,6 %



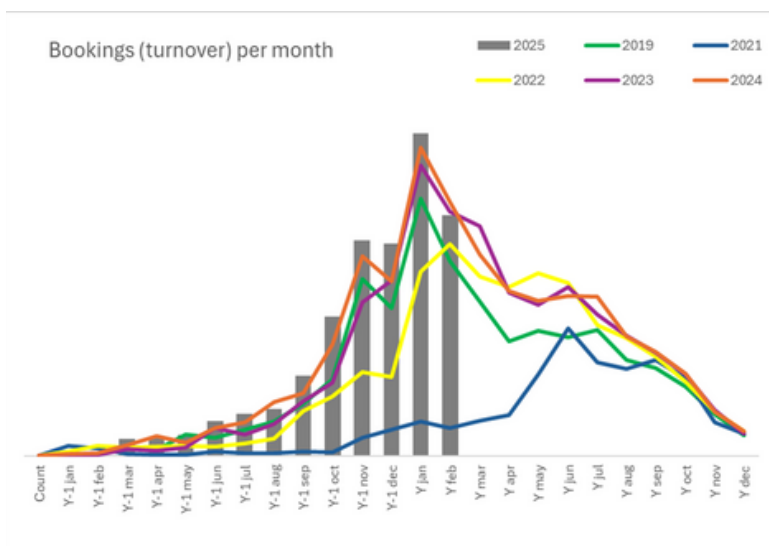
YTD 2025 vs. YTD 2023

+ 24,2 %

+ 10,9 %

#### Time of booking - YTD 2025

Source : TravelNote Trends - Turnover for departures in 2025 vs. previous years (bookings until Feb/2025 - Week 09)



#### Progression - Top 10 Destinations

Source: TravelNote Trends - Progression vs. last year - YTD 2025

|   |                                                                                     |    |      |   |    |                                                                                     |    |       |   |
|---|-------------------------------------------------------------------------------------|----|------|---|----|-------------------------------------------------------------------------------------|----|-------|---|
| 1 |  | SP | +0 % | = | 6  |  | AT | +19 % | ↗ |
| 2 |  | FR | +1 % | ↗ | 7  |  | BE | +9 %  | ↗ |
| 3 |  | IT | -1 % | ↘ | 8  |  | EG | +50 % | ↗ |
| 4 |  | GR | +4 % | ↗ | 9  |  | US | -3 %  | ↘ |
| 5 |  | TR | +4 % | ↗ | 10 |  | PT | +4 %  | ↗ |