

### Current situation - Organised BE Travel Market YTD 2023

#### Turnover & Pax

Source: TravelNote Trends - year-to-date 2023 vs. previous years (Turnover until 11/2023 - Week 47)

YTD 2023 vs. YTD 2022

**+18,5 %**



YTD 2023 vs. YTD 2019

**+19,1 %**

### Travel Forecast Model - Overall BE Travel Market Y2023

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

Source: Euromonitor - BE residents domestic and outbound departures - forecast full year 2023 (revised data dd. 15/11/2023)

Total trips (pax)

**37,2 mio**

+10 % vs. 2022

Retail Value

**31,0 billion**

+5 % vs. 2019

Average Retail Value

**832 €**

outbound 953 €

domestic 417 €

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

Category		2018	2019	2020	2021	2022	2023	2024	% Y23 vs. Y22	% Y23 vs. Y19
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

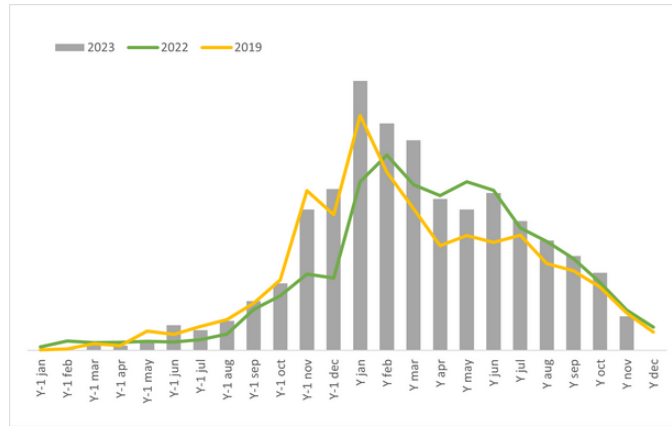
- 1  FR 36%
- 2  BE 23%
- 3  SP 7%
- 4  NL 7%
- 5  DE 4%

Outside Europe (% x 10)

- 1  TR 17%
- 2  MA 7%
- 3  US 6%
- 4  EG 3%
- 5  AE 3%

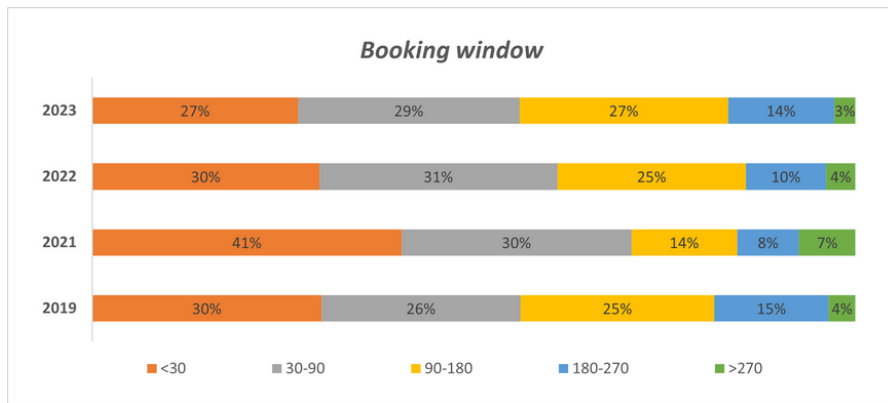
### Time of booking - YTD 2023

Source : TravelNote Trends - Turnover for departures in 2023 vs. previous years (bookings until Week 47)



### Booking window - YTD 2023

Source : TravelNote Trends - Booking window for departures YTD 2023 (bookings until Week 47)



### Bookings per target group - YTD 2023

Source : TravelNote Trends - Bookings per target group for departures YTD 2023 (bookings until Week 47)

	YTD2019	YTD2021	YTD2022	YTD2023
Couple	29%	34%	32%	34%
Family	27%	27%	29%	28%
Group	25%	23%	24%	24%
Single	19%	16%	15%	15%

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

#### Short-Medium Haul

- 1 SP 19,5%
- 2 TR 8,7%
- 3 FR 8,1%
- 4 IT 6,3%
- 5 GR 6,0%

#### Long Haul

- 1 US 2,8%
- 2 CV 1,1%
- 3 UA 1,0%
- 4 MX 0,9%
- 5 TH 0,7%