

The State of the Industry

Understanding key trends in uncertain times

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Identify patterns and trends that indicate past and forward-looking travelers' behavior



Traveler socio demographic

- Age
- Gender
- Nationality

Air searches and air fares

- Search volume
- Top origin markets
- Booking window

Air bookings and hotel demand

- Preferred Travel Dates
- Trip duration
- Lead time
- Air spending
- Booking channels

Traffic and schedule

- Route availability
- Direct vs. indirect flights
- Travel time/convenience
- Passenger volume
- Flight capacity

Hotel occupancy and length of stay

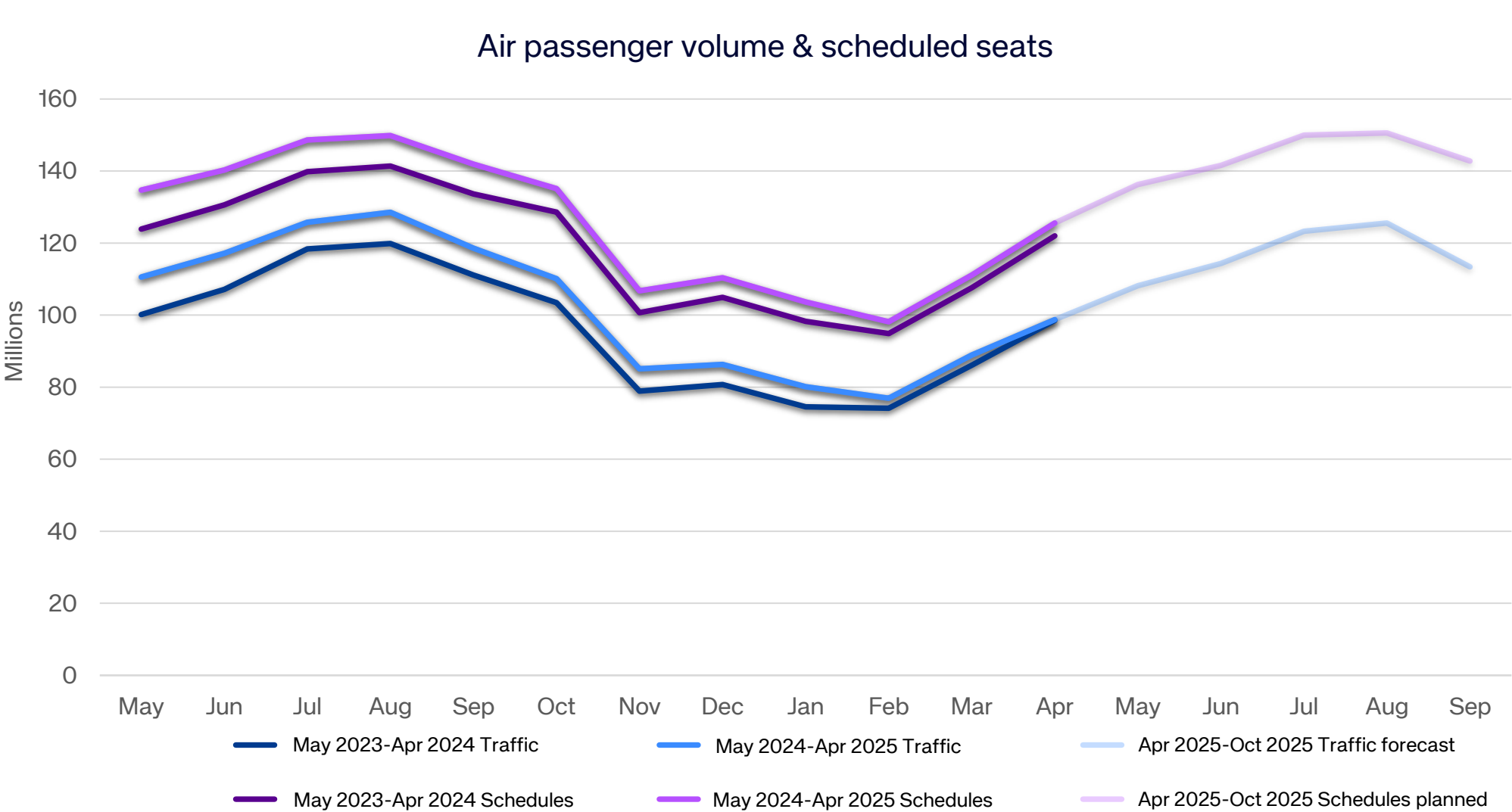
- Occupancy rates
- RevPAR
- Lead time
- Hotel booking spending

Travel Market Overview – Europe



Airflow Overview

Worldwide to Europe: Passenger traffic and Capacity analysis



Understand better my market and detect if new trends

Passenger traffic YoY

Travel Change YoY	2023 vs 2022	2024 vs 2023	2025 vs 2024 YTD.
Europe to Europe (domestic)	15.0%	8.7%	0.5%
From APAC to Europe	71.4%	21.4%	7.0%
From NORAM to Europe	19.5%	7.8%	2.2%



Travel patterns from Europe: Reality vs. aspirations

Top 10 countries searched from Europe

Destination countries	May.23-Apr.24 ranking	May.24-Apr.25 ranking
Spain	1	1
Italy	2	2
United Sta.	3	3
United Kin.	4	4
France	5	5
Germany	6	6
Turkey	7	7
Greece	8	8
Thailand	10	9
Portugal	9	11

Top 10 countries receiving passengers from Europe

Destination countries	May.23-Apr.24 ranking	May.24-Apr.25 ranking
Spain	1	1
United Sta.	2	2
Italy	3	3
France	4	4
Germany	5	5
United Kin.	6	6
Norway	7	7
Portugal	9	8
India	10	9
Thailand	12	10
Total	44.3%	44.7%

Travel patterns from Europe to World*: Reality vs. aspirations

Top 10 destinations searched from Europe

Destinations	May.23-Apr.24 ranking	May.24-Apr.25 ranking
United States	1	1
Thailand	2	2
China	5	3
India	3	4
United Arab.	4	5
Morocco	6	6
Japan	10	7
Egypt	8	8
Canada	7	9
Brazil	9	10

Top 10 destinations receiving passengers from Europe

Destinations	May.23-Apr.24 ranking	May.24-Apr.25 ranking
United Sta.	1	1
India	2	2
Thailand	4	3
United Ara.	3	4
China	5	5
Japan	8	6
Canada	6	7
Vietnam	11	8
Pakistan	7	9
Indonesia	12	10
Total	46.0%	48.0%

*excluding Europe

Travel patterns from Europe to Europe: Reality vs. aspirations

Top 10 destinations searched from Europe to Europe

Destinations	May.23-Apr.24 ranking	May.24-Apr.25 ranking
Spain	1	1
Italy	2	2
United Kin.	3	3
France	4	4
Germany	5	5
Turkey	6	6
Greece	7	7
Portugal	8	8
Poland	10	9
Netherlands	11	10

Top 10 destinations receiving passengers from Europe to Europe

Destinations	May.23-Apr.24 ranking	May.24-Apr.25 ranking
Spain	1	1
Italy	2	2
France	3	3
Germany	4	4
United Kin.	5	5
Norway	6	6
Portugal	8	7
Turkey	7	8
Sweden	9	9
Greece	10	10

Total	72.1%	71.9%
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Travel patterns from Europe to United States: Reality vs. aspirations

Top 10 origin markets searched from Europe to US

Origin markets	May.23-Apr.24 ranking	May.24-Apr.25 ranking
United Kin.	1	1
Germany	2	2
Italy	3	3
France	4	4
Spain	5	5
Netherlands	6	6
Ireland	7	7
Switzerland	8	8
Poland	10	9
Portugal	9	10

Top 10 origin markets receiving passengers from Europe to US

Origin markets	May.23-Apr.24 ranking	May.24-Apr.25 ranking
United Kin.	1	1
Italy	2	2
Germany	3	3
France	4	4
Spain	5	5
Netherlands	6	6
Switzerland	7	7
Ireland	8	8
Portugal	10	9
Poland	11	10
Total	80.0%	80.0%

Where do European's visitors come from*? Reality vs. aspirations

Top 10 origin markets searched to Europe

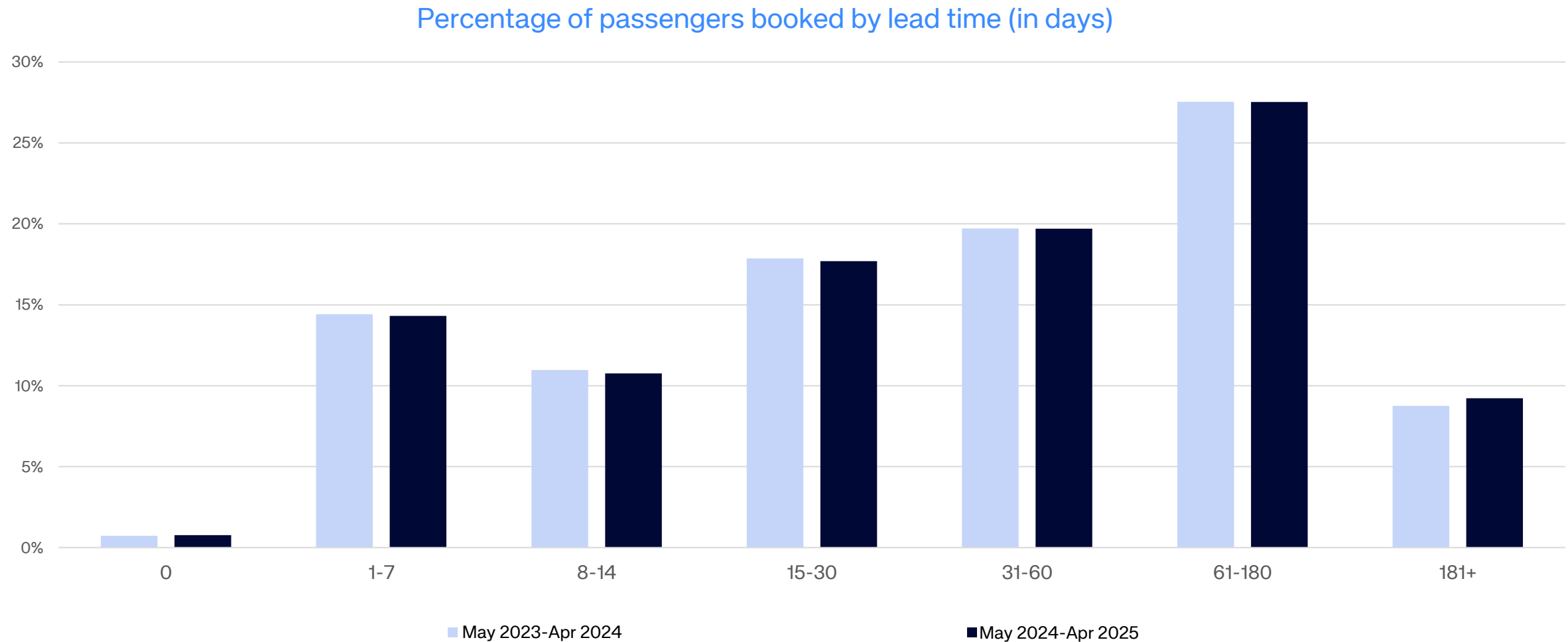
Origin markets	May.23-Apr.24 ranking	May.24-Apr.25 ranking
United Sta.	1	1
China	8	2
Brazil	2	3
Canada	3	4
India	4	5
Israel	5	6
United Ara.	6	7
South Korea	9	8
Japan	12	9
Australia	7	10

Top 10 origin markets receiving passengers to Europe

Origin markets	May.23-Apr.24 ranking	May.24-Apr.25 ranking
United Sta.	1	1
India	2	2
Australia	4	3
Israel	3	4
Canada	5	5
Brazil	6	6
Algeria	7	7
South Korea	8	8
United Ara.	9	9
Saudi Arab.	10	10
Total	52.0%	52.0%

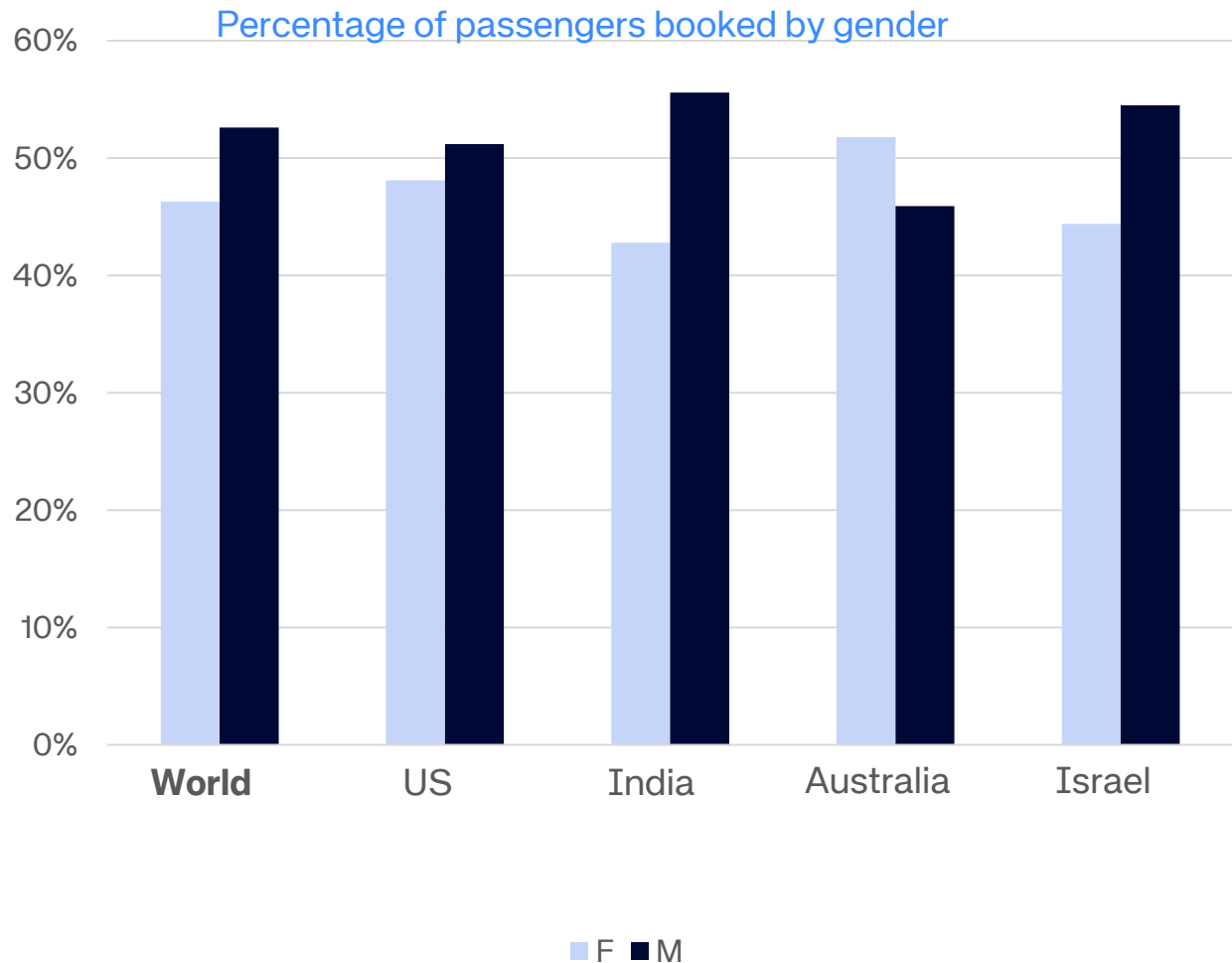
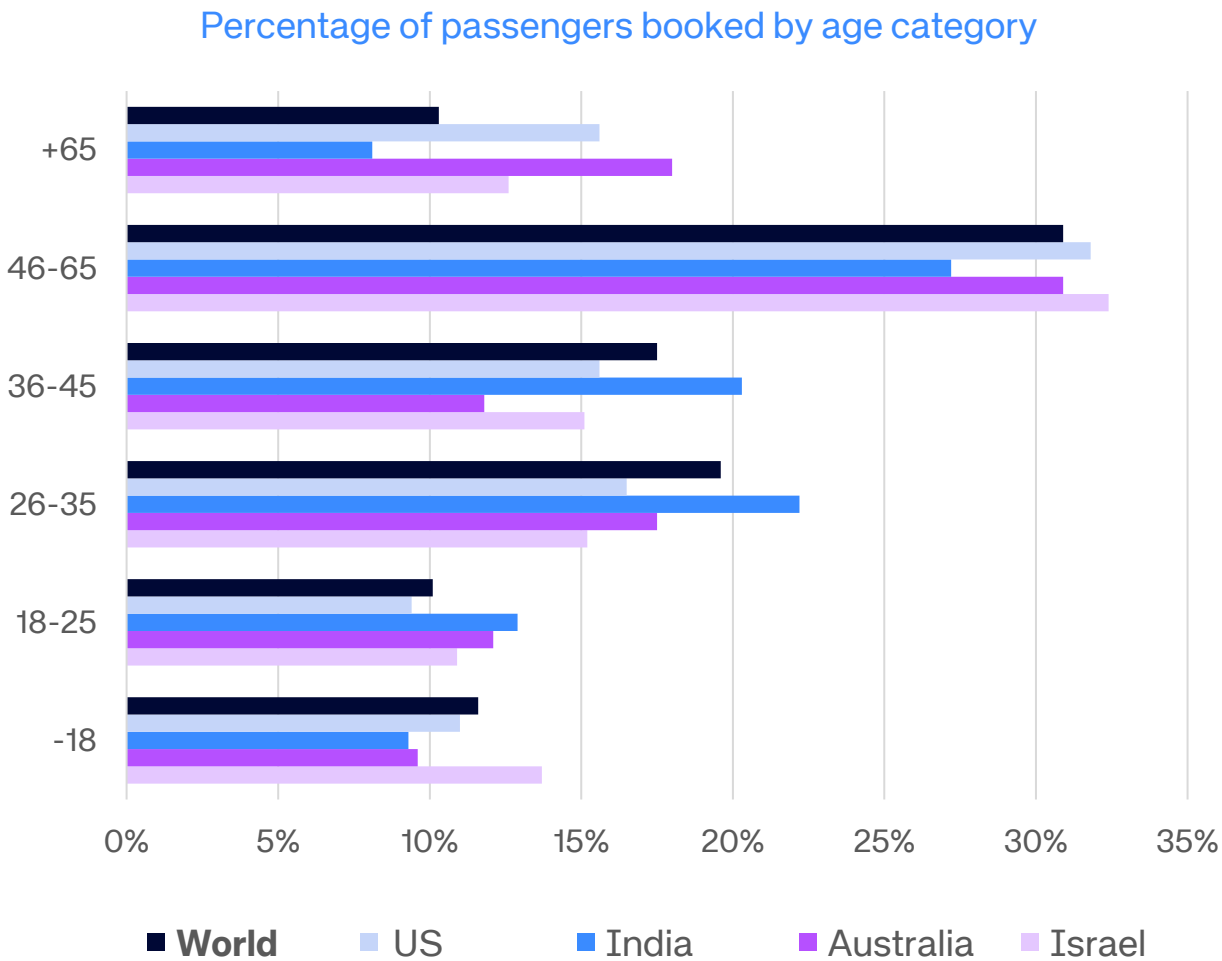
* International flights only, out of Europe

Worldwide* to Europe: Air travel bookings by Lead time



*excluding Europe

Worldwide* to Europe: Exploring the types of travelers

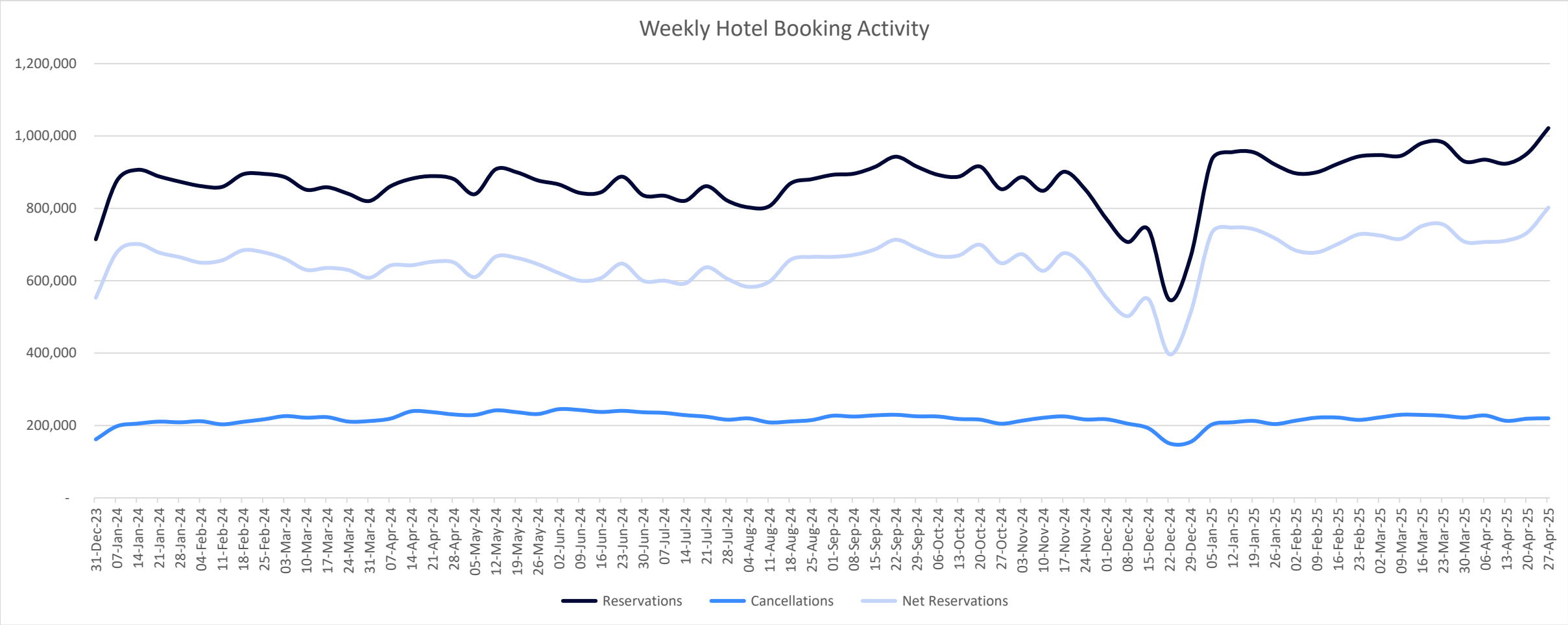


*excluding Europe

Hospitality Occupancy Overview – Europe

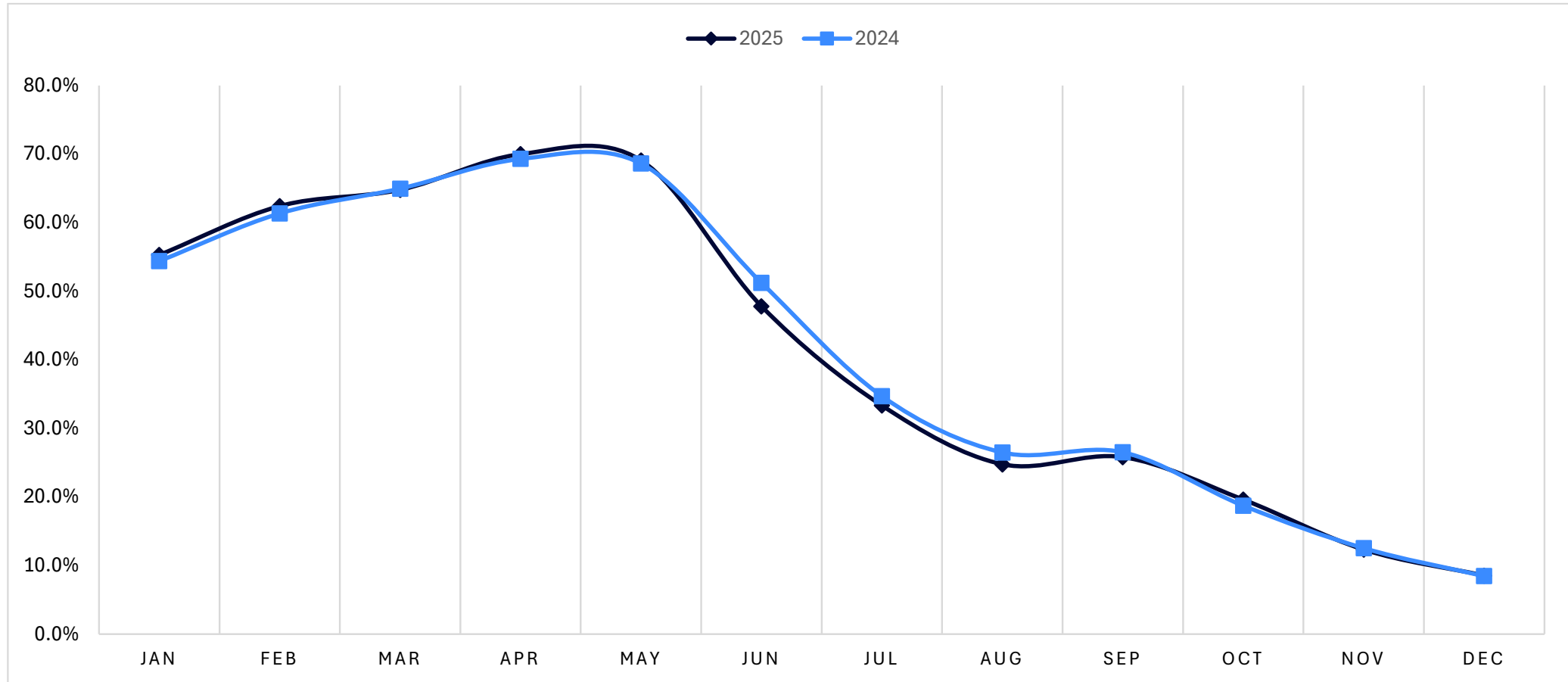
Europe Hotel Booking Activity

Hotel Demand360®



Europe Occupancy

On-the-Books occupancy for 2025 is -0.2% points less than STLY

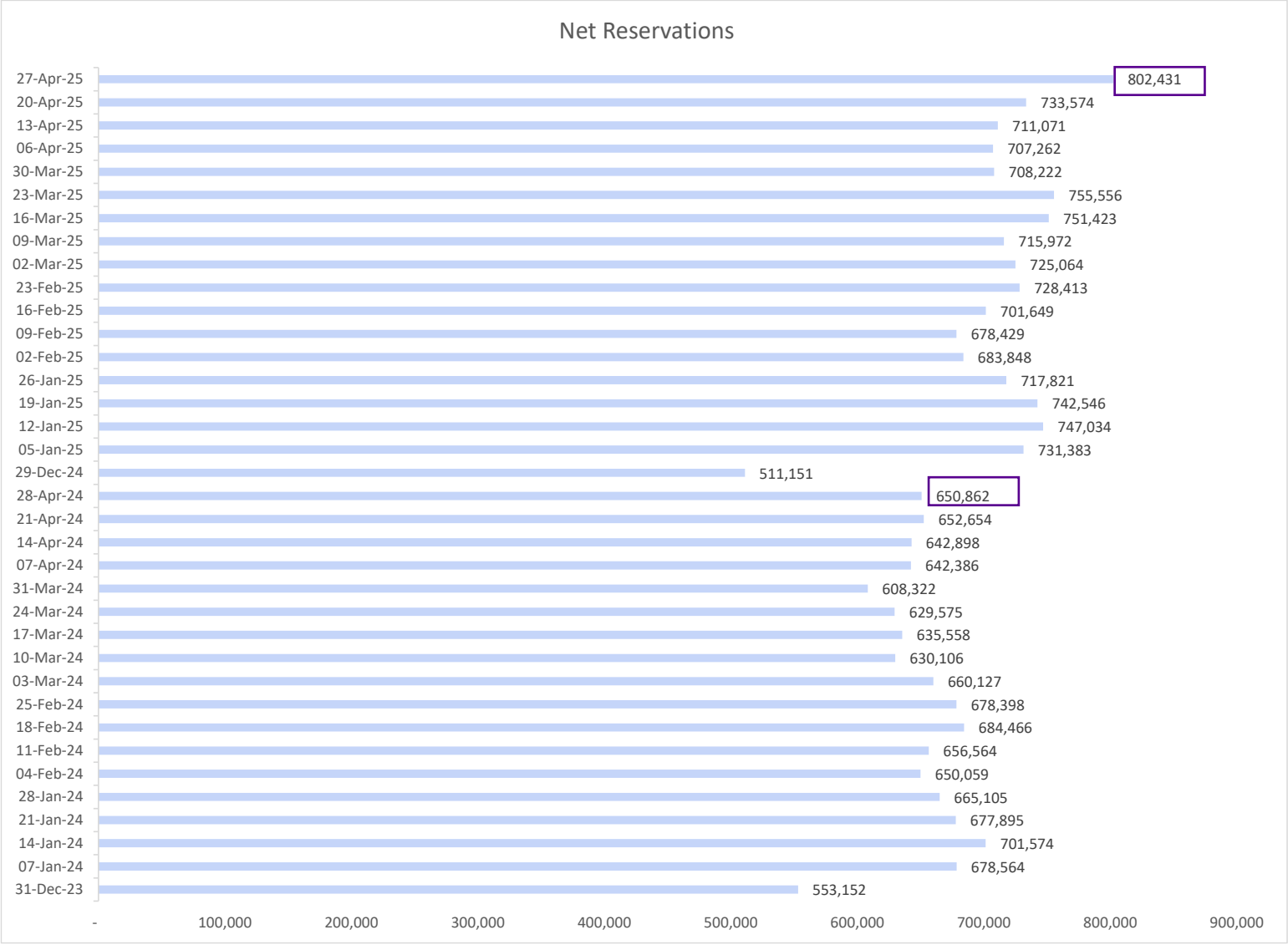


Net Hotel Booking Activity

Europe

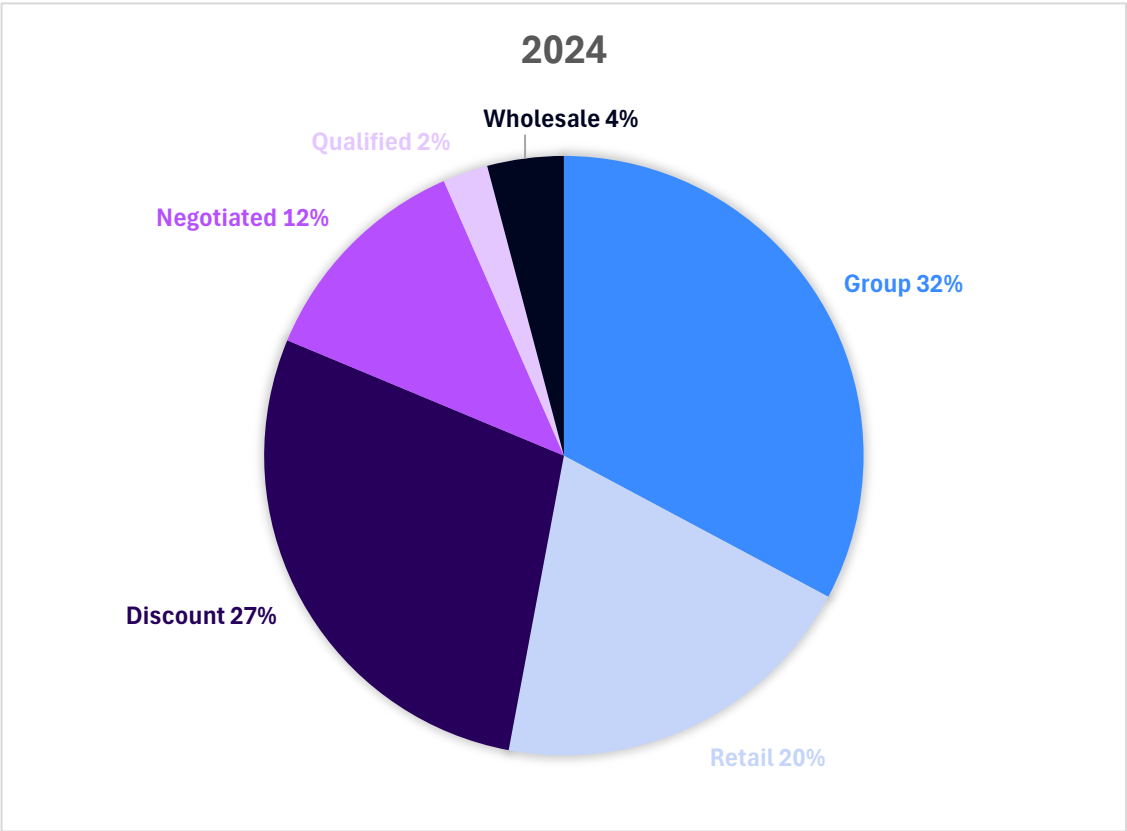
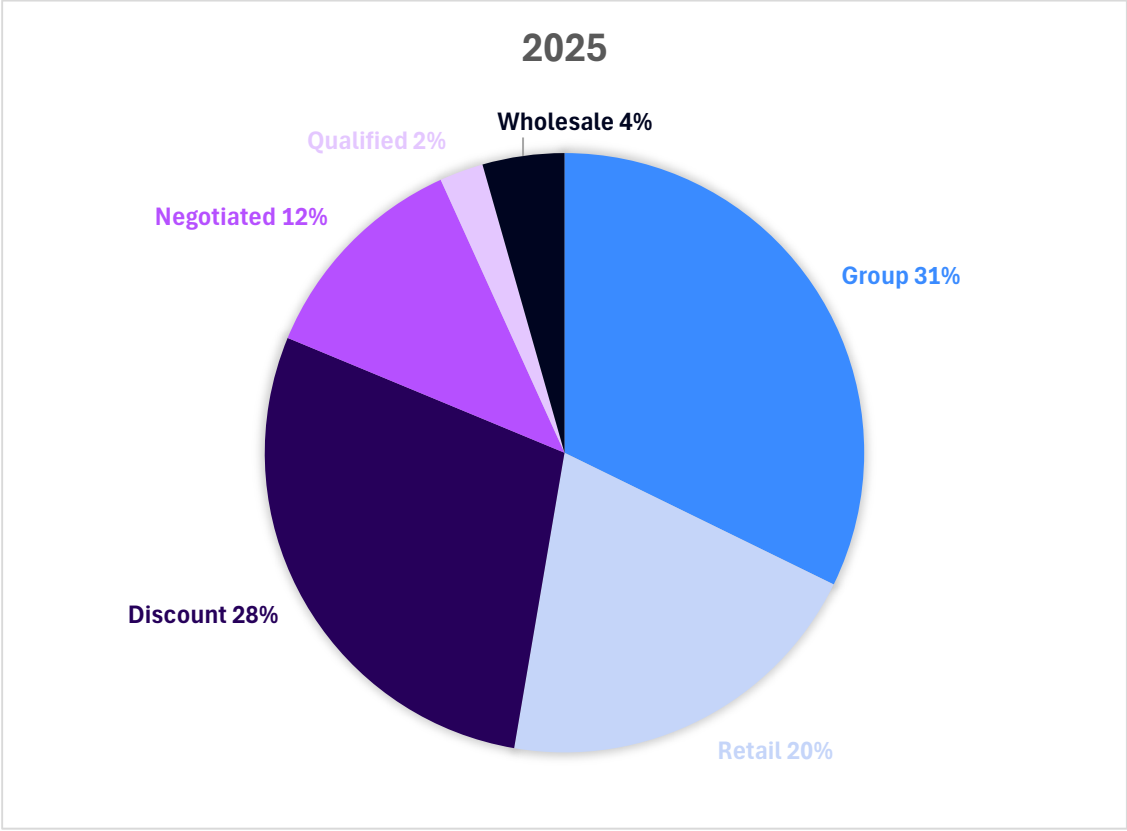
2025

2024



Europe

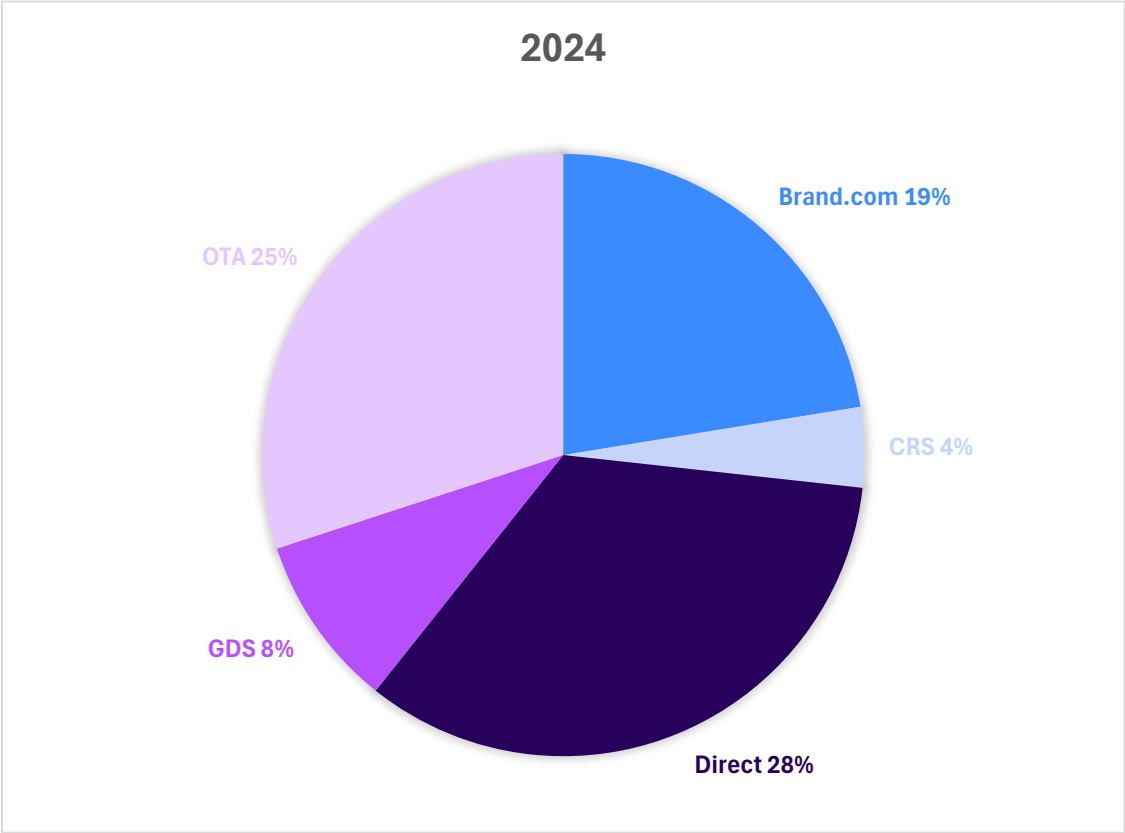
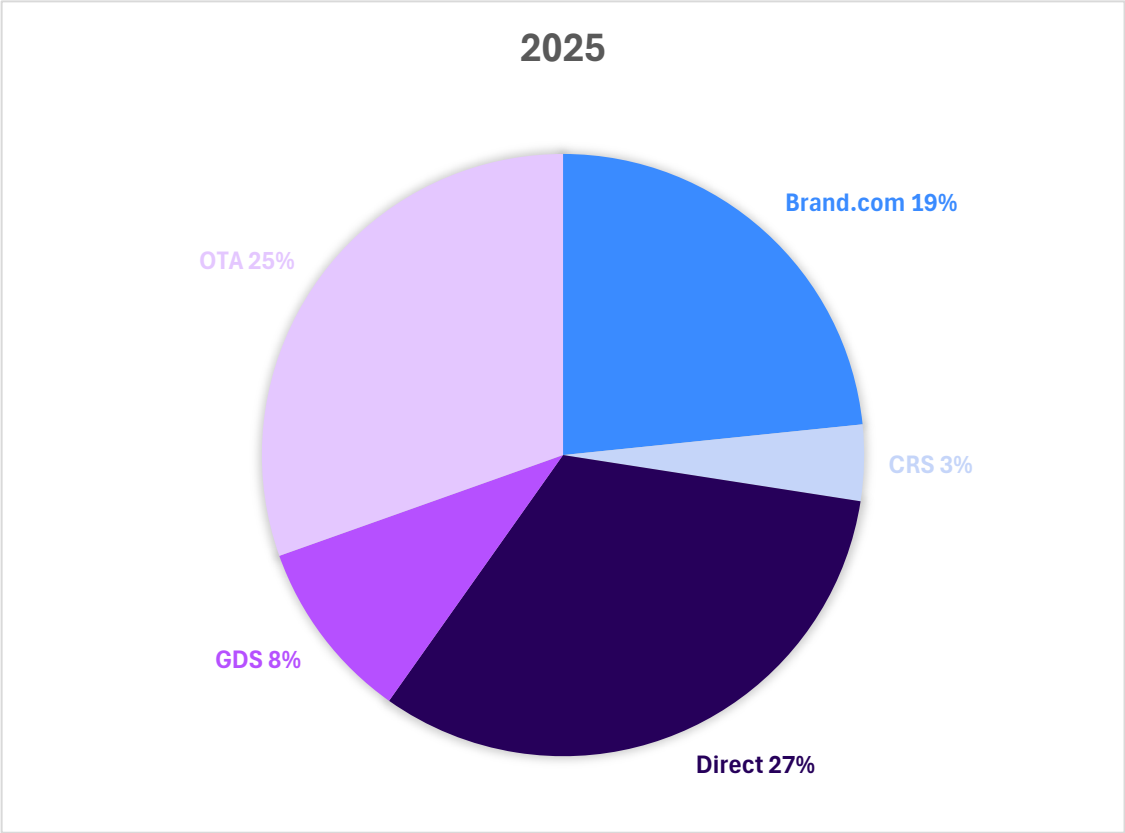
Mix of Business



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Europe

Channel Mix



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Poll

Would you like to explore how data can support your specific goals or challenges?

- a) Yes, I'd like to discover insights tailored to my business
- b) Maybe later – keep me updated
- c) Not at the moment



Thank you