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Travel Trends and Outlook

International Tourism Fair: Madagascar

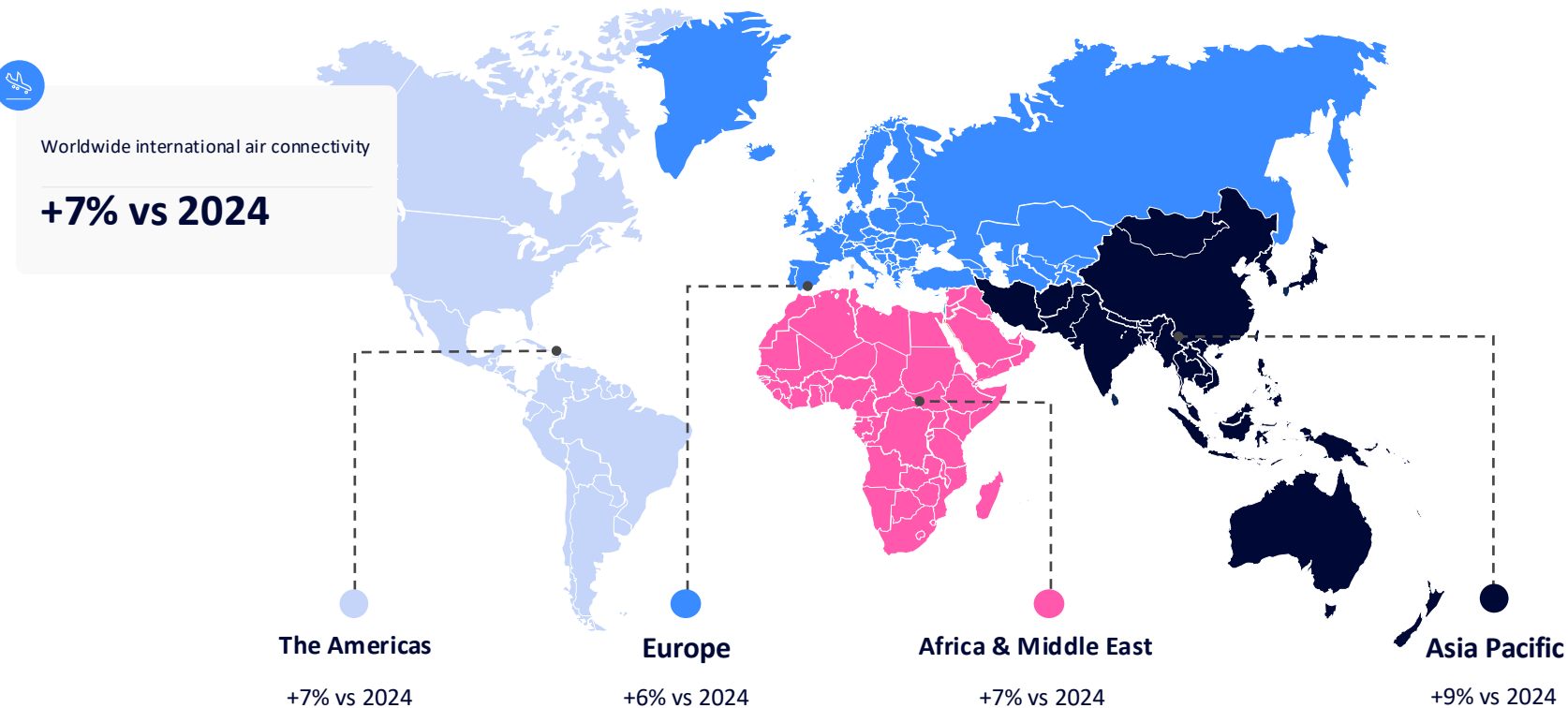
Olivier Ponti – Director of Intelligence and Marketing

June 2025

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Airlines boost available seats for record 2025 year of air travel

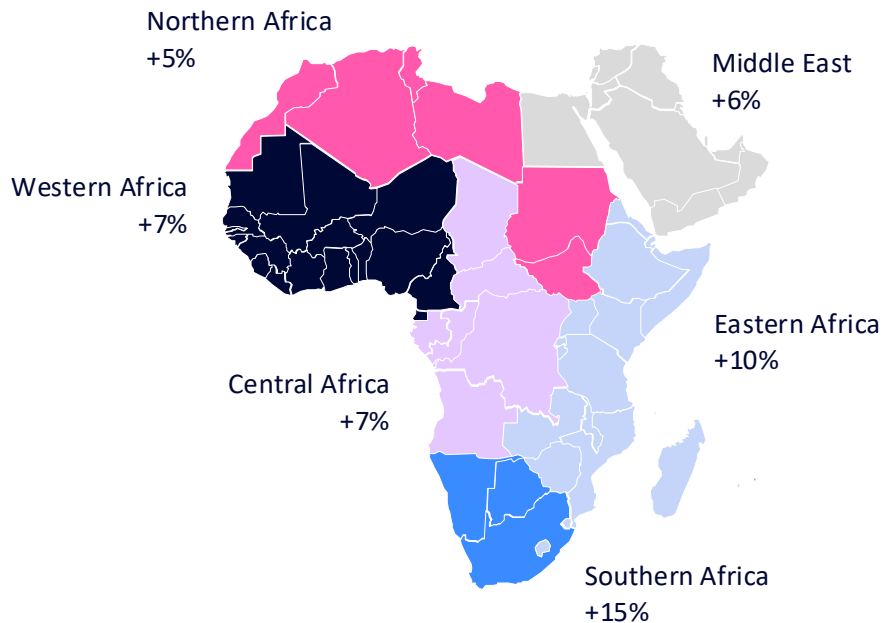
Flown and Forecasted air supply for international flights between July and September 2025; vs previous year



Boosts in air connectivity to Eastern and Southern Africa drive growth

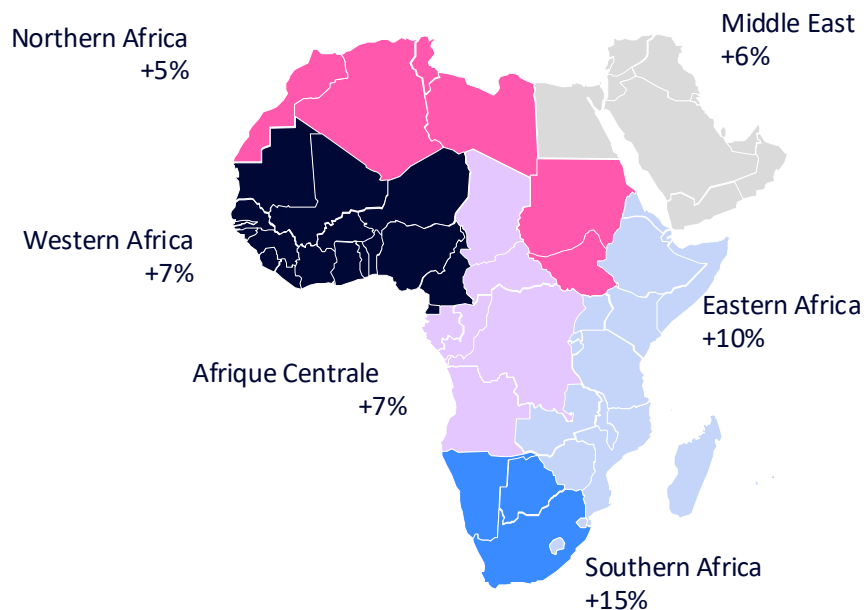
Flown and Forecasted air supply for international flights to Africa and the Middle East between July and September 2025; vs previous year

Africa & MIDE
 +7% vs 2024



Boosts in air connectivity to Eastern and Southern Africa drive growth

Flown and Forecasted air supply for international flights to Africa and the Middle East between July and September 2025; vs previous year

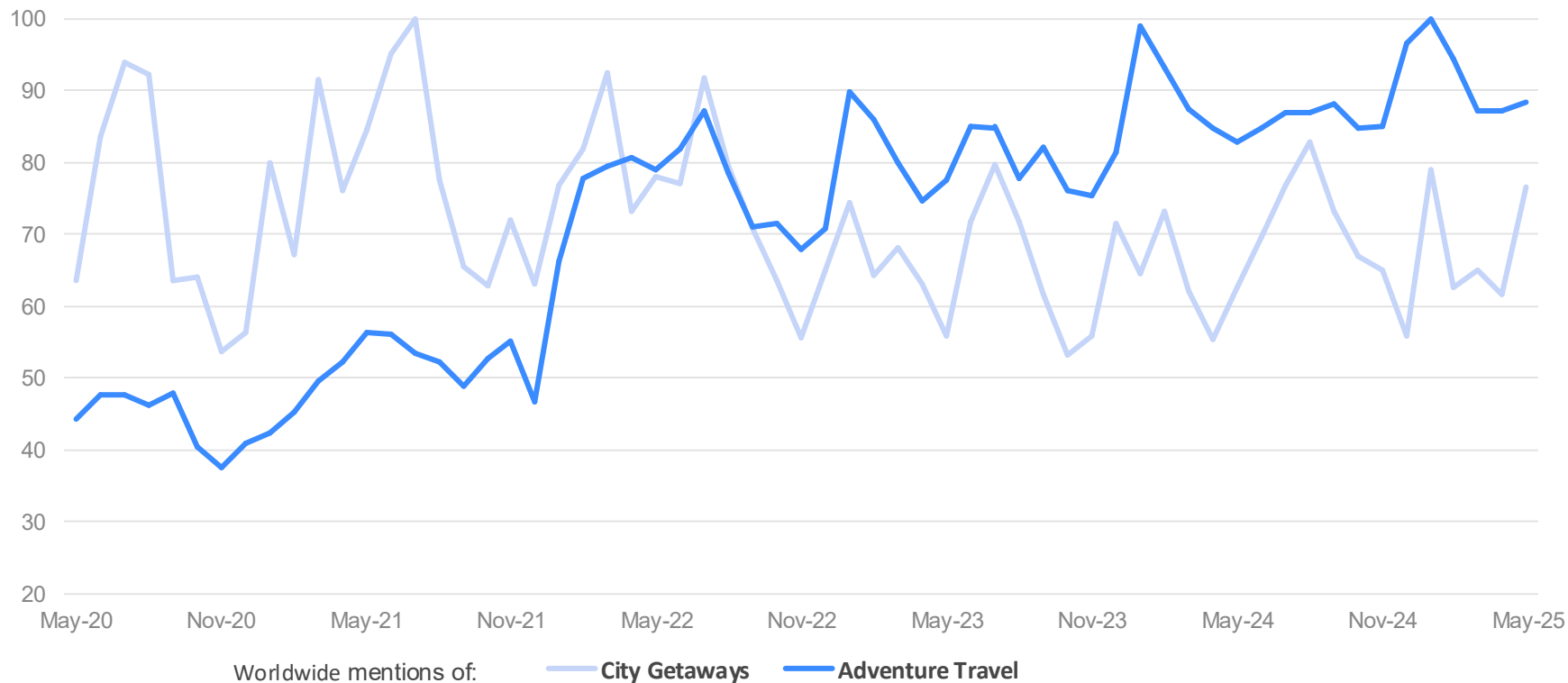


Top Performing Destinations*		Vs 2024
●	Seychelles	+33%
●	Namibia	+20%
●	Gabon	+17%
●	Sudan	+16%
●	Mali	+13%
●	Madagascar	+13%
●	Guinea	+11%
●	Uganda	+11%
●	Cape Verde	+11%
●	Togo	+10%

*considering destinations that represent between 0.5% and 2% share

Adventure Tourism is gaining popularity

Google Trends – Worldwide mentions of city getaways and Adventure Travel in the last 5 yrs



Understanding key markets: Travel Intent

Madagascar Travel Intent: Up and coming markets are key drivers of growth

Flight Searches made year-to-date for travel to Madagascar between July and September 2025; vs 2024

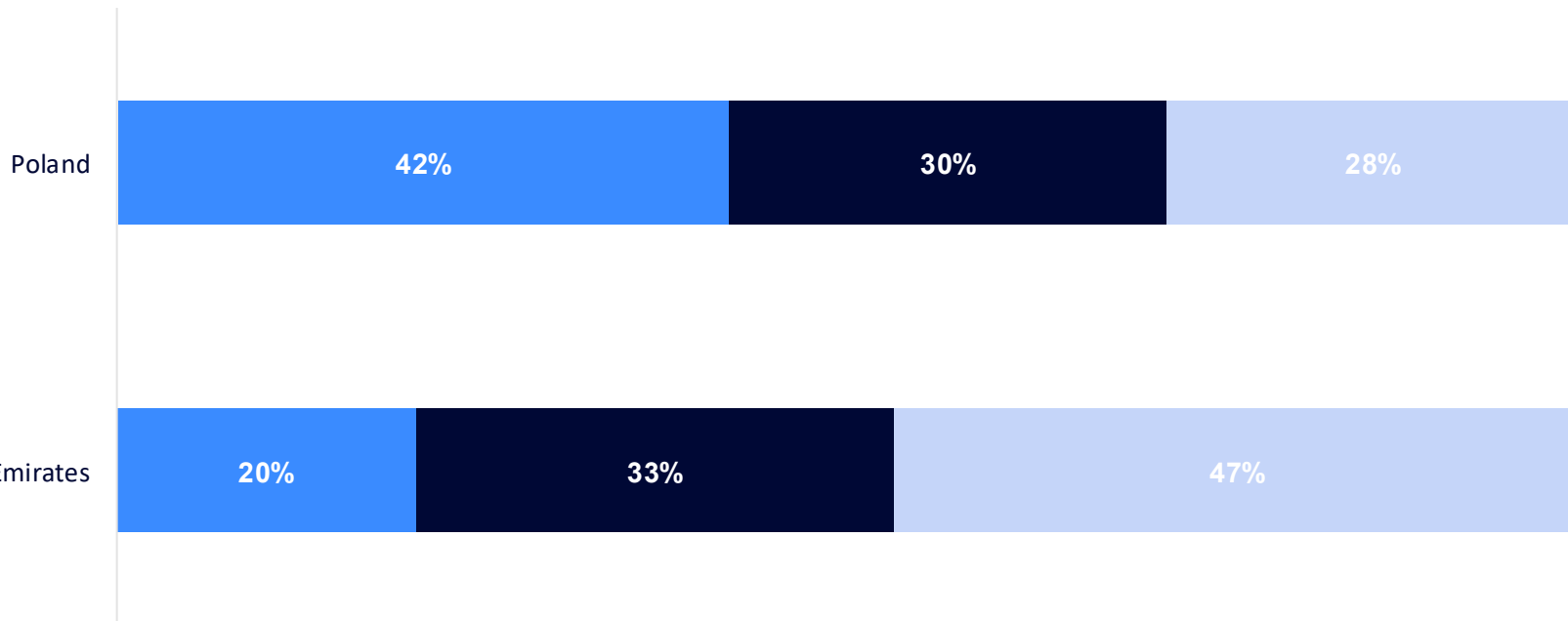
Top performing origin markets*	% Share	Vs 2024
Poland	1.8%	+48%
United Arab Emirates	1.0%	+45%
Austria	1.7%	+9%
United Kingdom	2.2%	+9%
Spain	5.7%	+7%
South Africa	2.1%	+6%
Belgium	1.7%	+5%
Mauritius	1.3%	+2%
France	33.7%	+2%
Italy	13.9%	+1%

**considering markets that represent more than 0.75% share*

Madagascar Travel Intent: Comparing search patterns of top performing markets

Flight Searches made year-to-date for travel to Madagascar between January and March 2025; vs 2024

- Long leadtimes
 More than 90 days anticipation
- Medium Leadtimes
 Between 30-89 days anticipation
- Short Leadtimes
 Less than 30 days anticipation



Opportunities – Air Connectivity Network

Emirates: Now #2 in Madagascar Following New Routes

Top Airlines operating direct flights to Madagascar year-to-date



Seats: 57,443
% Share: 23.9%



Seats: 34,188
% Share: 14.2%



Seats: 30,017
% Share: 12.5%



AIR AUSTRAL

Seats: 22,936
% Share: 9.5%



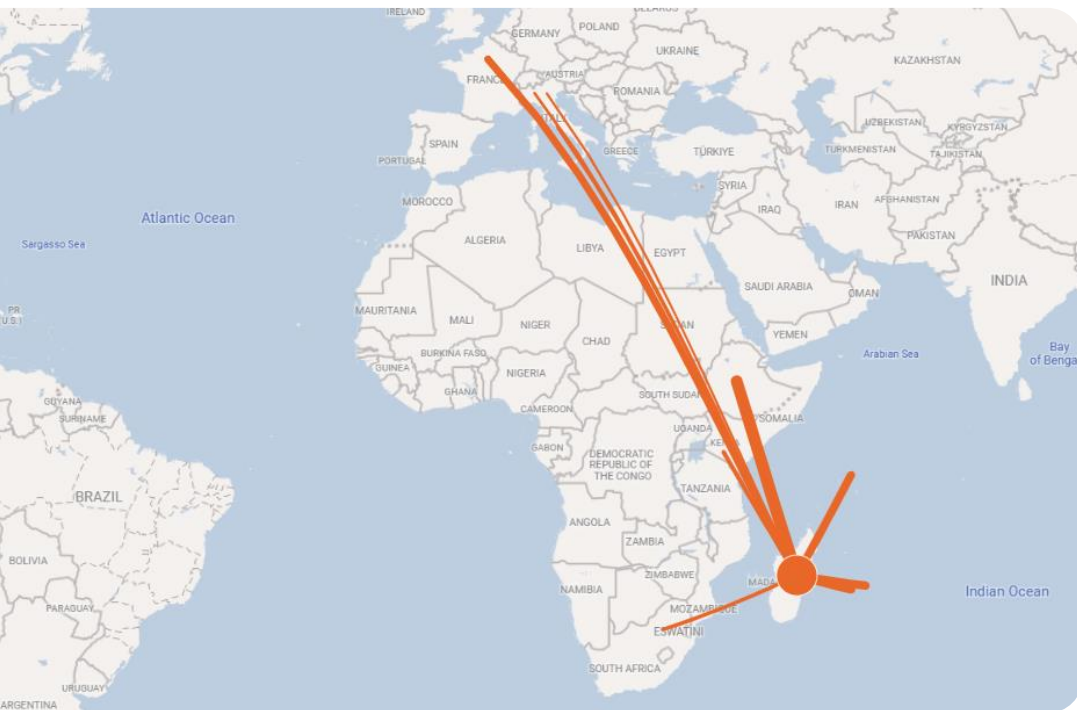
Seats: 21,080
% Share: 8.8%



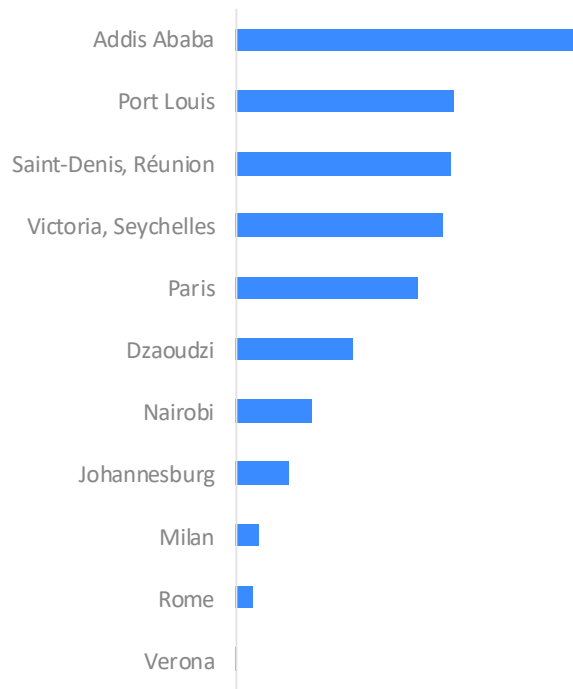
Seats: 19,072
% Share : 7.9%

Limited Direct Access: Just 11 Routes Make Madagascar Dependent on Key Hubs

International Air Supply for flights arriving to Madagascar year-to-date



Seats on direct flights from:



Addis Ababa remains a key driver of success for Madagascar tourism

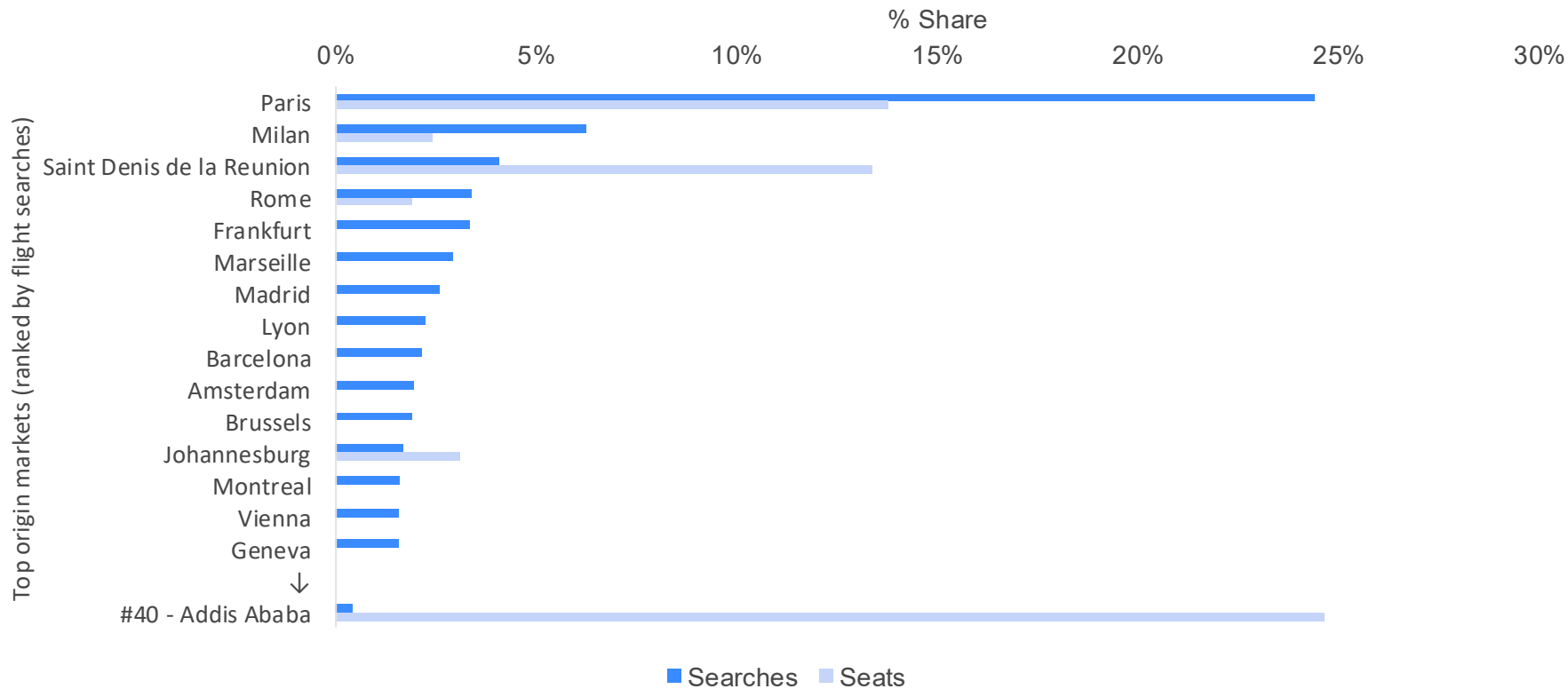
International air reservations made year-to-date for travel to Madagascar; vs 2024

Connecting Hub	Var vs 2024
Addis-Abeba ADD	+31%
Paris CDG	+2%
Total non-direct	+1%

Direct Flights	Var vs 2024
Antananarivo TNR	+7%
Total direct	+4%

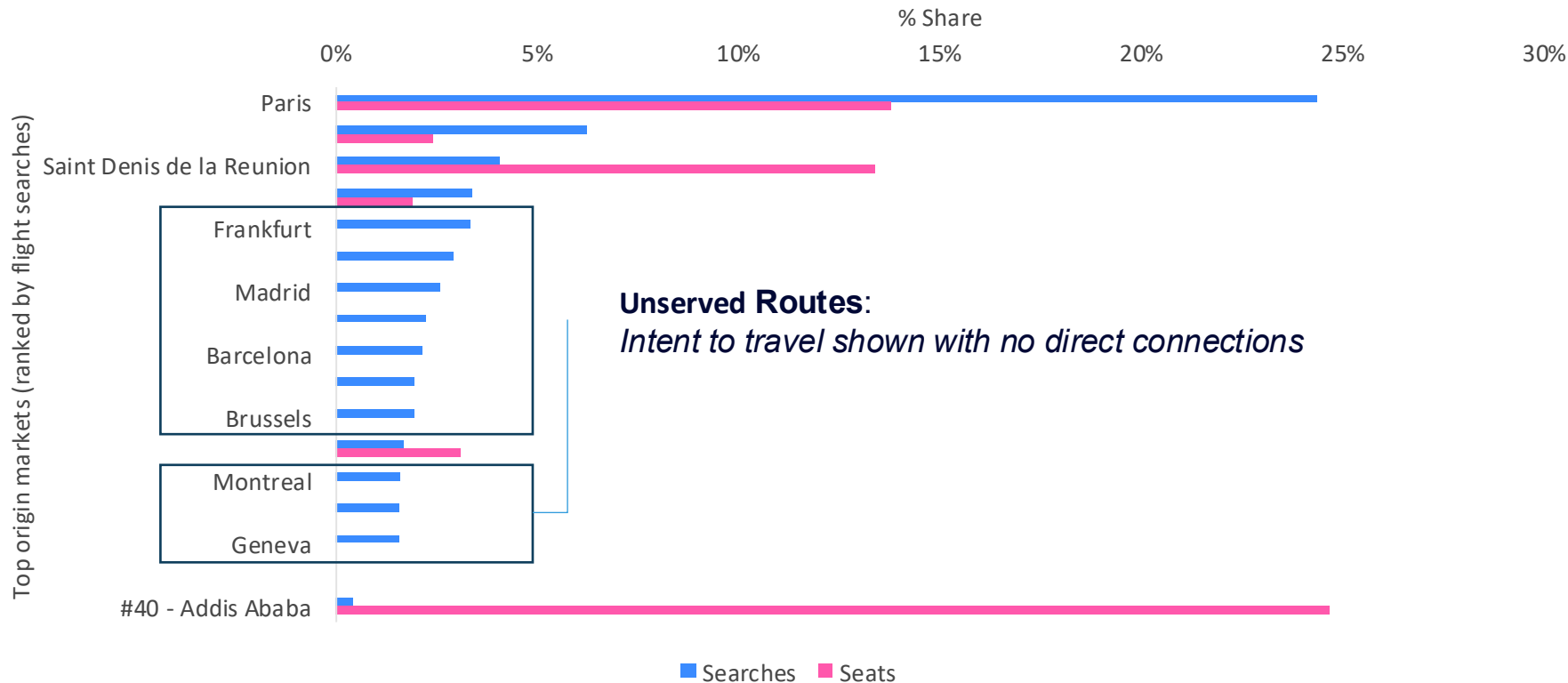
Identifying Opportunities: Underserved Routes

Flight Searches made and forecasted seat capacity for flights to Madagascar between July and September



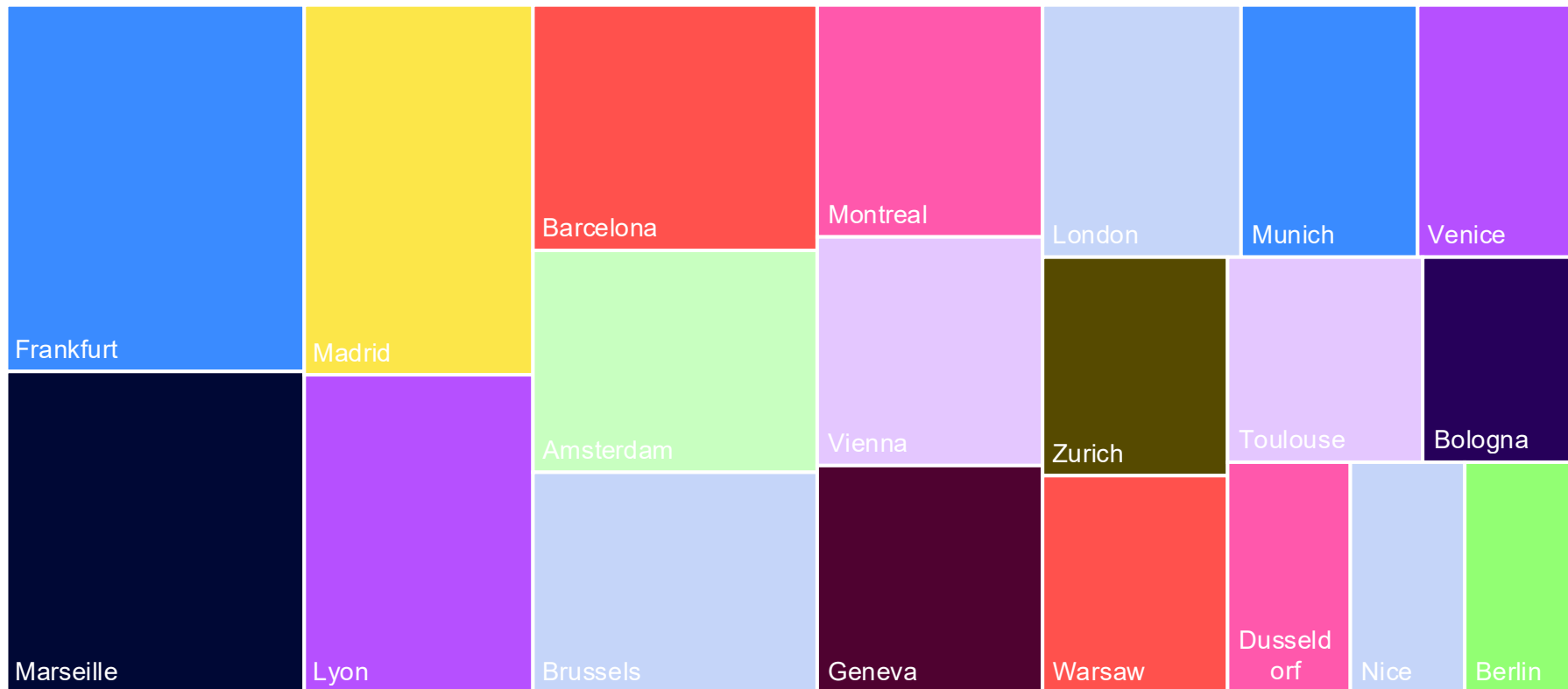
Identifying Opportunities: Underserved Routes

Flight Searches made and forecasted seat capacity for flights to Madagascar between July and September



Identifying Opportunities: Unserved Routes

Flight Searches made and forecasted seat capacity for flights to Madagascar between July and September



Traveller Profiles

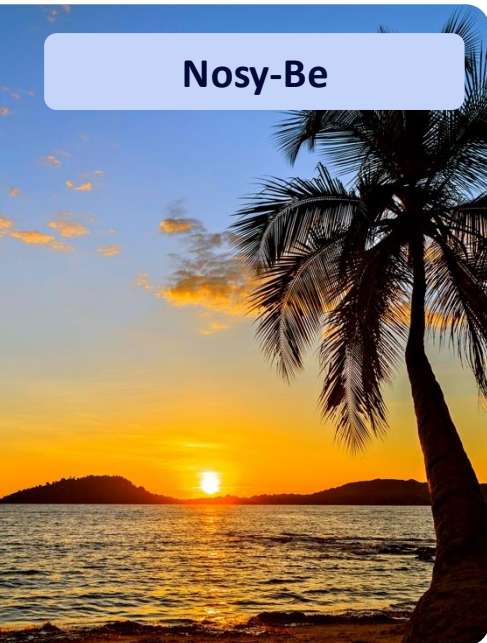
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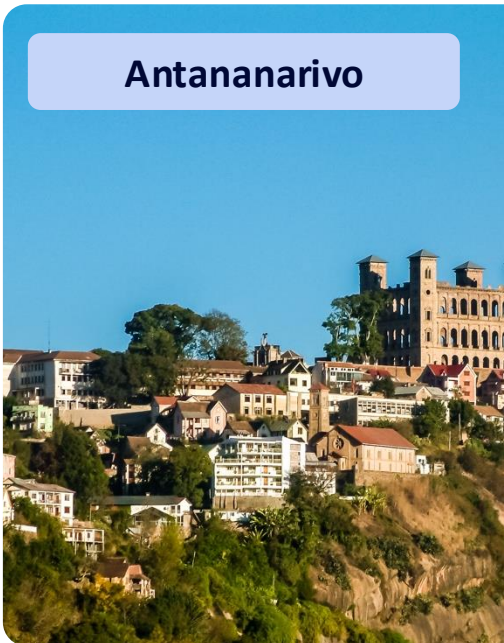
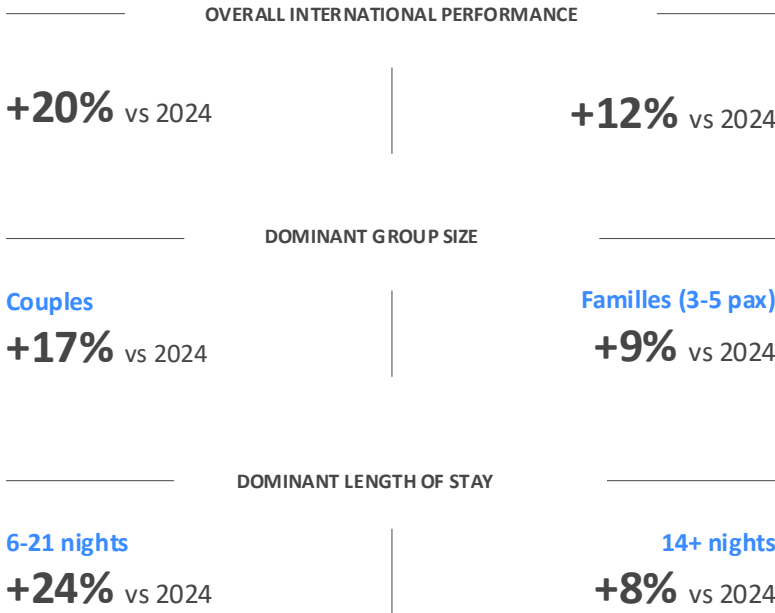


How distinct destination offerings attract different traveller profiles

International air reservations to Madagascar as of 28 May for arrivals between July and September



Nosy-Be



Antananarivo

Strong growth from key markets

International air reservations to Madagascar as of 28 May for arrivals between July and September

Nosy-Be



+20% vs 2024

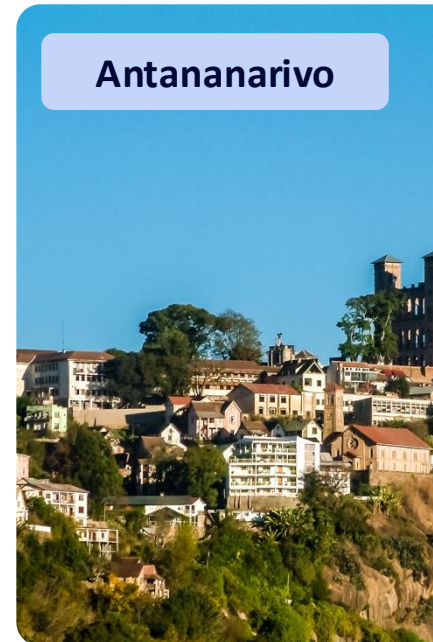
Top Performing Markets	Vs 2024
Belgium	+51%
Italy	43%

OVERALL INTERNATIONAL PERFORMANCE

+12% vs 2024

Top Performing Markets	Vs 2024
Germany	+70%
Switzerland	+24%

Antananarivo



Madagascar is attracting group bookings to drive tourism growth

International air reservations to Madagascar between January and September, as of 28 May 2025; vs 2024



Solo

+2% vs 2024



Couples

+7% vs 2024



Families

Considering itineraries with 3-5 pax

+10% vs 2024



Large Groups

Considering itineraries with 6+ pax

+22% vs 2024

Madagascar is attracting more family bookings

International flight reservations arriving to the Vanilla Islands between January and September; vs 2024



Families

Considering itineraries with 3-5 pax

Destination	Var vs 2024
Mayotte	+21%
Madagascar	+10%
Comoros	+7%
Reunion Island	+4%
Seychelles	+2%
Mauritius	-3%

Madagascar is attracting more family bookings... and they're staying longer

International flight reservations arriving to the Vanilla Islands between January and September; vs 2024



Families

Considering itineraries with 3-5 pax

Destination	Var vs 2024	Avg. Length of stay
Mayotte	+21%	8 nights
Madagascar	+10%	16 nights
Comoros	+7%	12 nights
Reunion Island	+4%	13 nights
Seychelles	+2%	9 nights
Mauritius	-3%	9 nights

High-value travellers

International air reservations on premium cabins to Madagascar between January and September, as of 28 May 2025; vs 2024

Top Performing Premium Origin Markets	Var vs 2024
Australia	+56%
South Africa	+54%
Italy	+37%
Reunion Island	+33%
Mauritius	+27%
U.S.A.	+24%
Germany	+22%
TOTAL	+10%

Take-Aways



1

Travel demand remains strong

2

International air connectivity is key

3

**There are still many untapped
opportunities**

4

**Leveraging data is key for
meaningful growth**

THANK YOU!

Olivier Ponti

Director of Intelligence and Marketing

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