



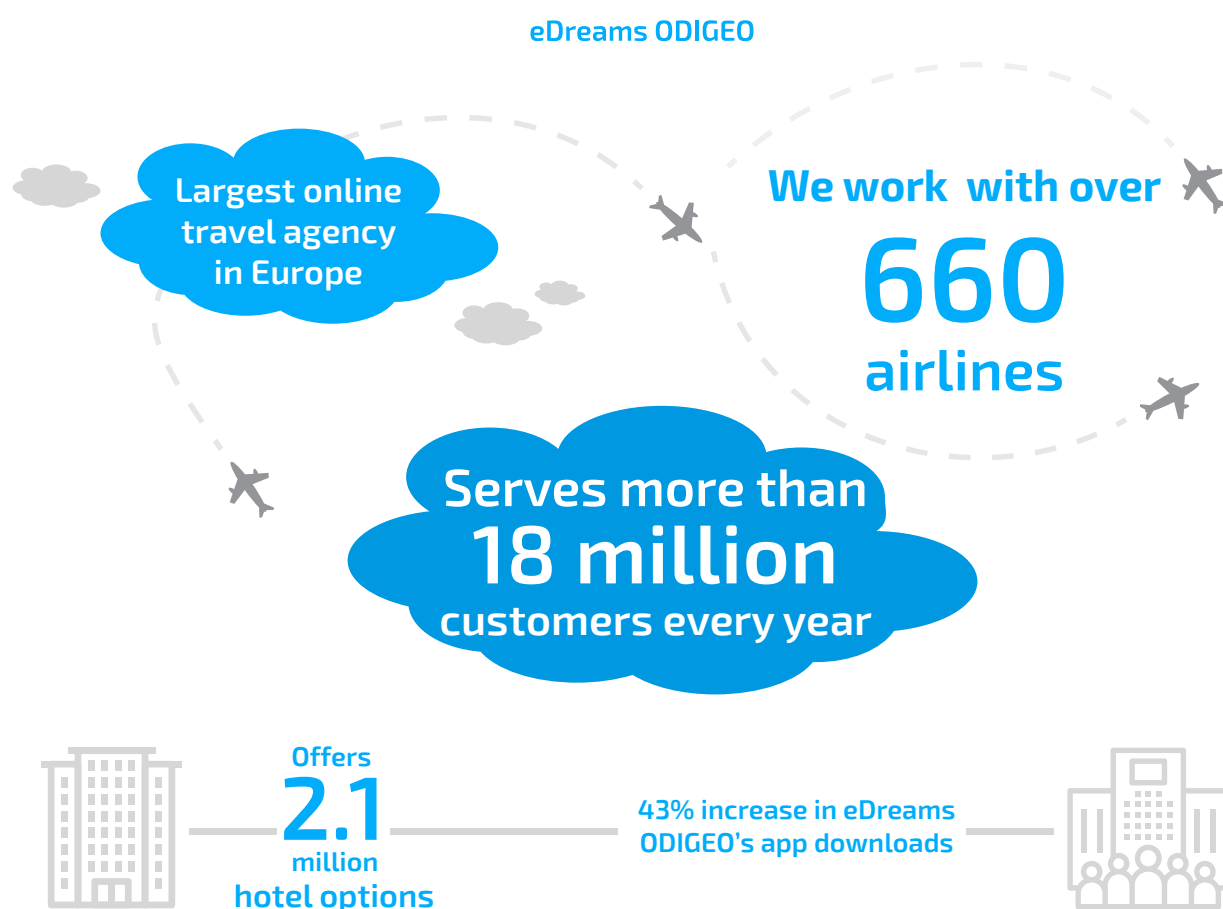
eDreams ODIGEO

European Traveller Insights Report 2019

A close look at the ultimate travel trends

About eDreams ODIGEO

eDreams ODIGEO is Europe's largest online travel company, putting technology to work on behalf of the consumer so that they may achieve the best price with the greatest convenience. With 20 years of experience, eDreams ODIGEO has grown a successful business and operates highly regarded global brands including eDreams, GO Voyages, Opodo, Travellink, and the metasearch engine Liligo. It offers the best, most convenient deals in travel services, including flights, hotels, car rental, and insurance.



Top growth countries for European travellers

Top 10 growth countries in 2019

Australia is a favourite amongst European travellers in 2019, with a 74% year-on-year passenger growth. The country has a number of global attractions that entice the average globetrotter, including competitive flight pricing, the breathtaking natural surroundings and, of course, the friendly locals.

Visitors from European markets, compared to the other markets all over the world, have a higher chance of travelling to regional destinations and staying longer.¹

In 2018–2019, 47% of the visitors travelled to Australia on their holidays for leisure purposes (30% visiting friends or relatives; 7.3% for business and 6.5% for education).² International visitor numbers to Australia are projected to grow by 64% in 2026–27 compared to 2017–18.³

Albania, the small jewel of Eastern Europe, places second with an impressive 41% growth. The Tourism Office's communications campaign based on the film "Taken" may have contributed to the country gaining mass public attention.⁴ Moreover, the diversity of landscapes, its cultural, historical wealth and its ideal location for European travellers, only confirmed its status as a must-see destination in 2019.

A significant promotion of Albania, led by the European Union and the European Bank for Reconstruction and Development (EBRD), was launched in May 2019. The program aims to highlight the tourism offer across four regions (Berat, Korçë, Fier and Shkodra).⁵

As a destination for tourists, **Indonesia** grew by an impressive 33%. Hardly a surprise as one could visit this country several times and still have so many hidden treasures to uncover. The 17,000 islands have much to offer, including enchanting temples, spectacular mountains, vibrant rice fields, sandy white beaches, rich diving sites, tantalising food, and so much more.

South Africa has seen a 31% growth. Large-scale investments were made in the tourism sector, contributing to establishing the transport and food industries for the country.⁶

In addition to the many historical and cultural assets such as dynamic cities, safaris, the Cape of Good Hope, wine regions and much more, this English speaking country attracts nationalities from all over the globe.

¹ [The beach, bush and beyond: understanding regional dispersal of Australian tourists - Australian Government, p.6](#)

² <https://www.abs.gov.au/ausstats/abs@nsf/products/96186853887C130ACA25740300108D05>

³ Tourism Research Australia, 2018, State Tourism Satellite Accounts 2016–17, p.2

⁴ <https://www.lonelyplanet.com/articles/taken-by-albania>

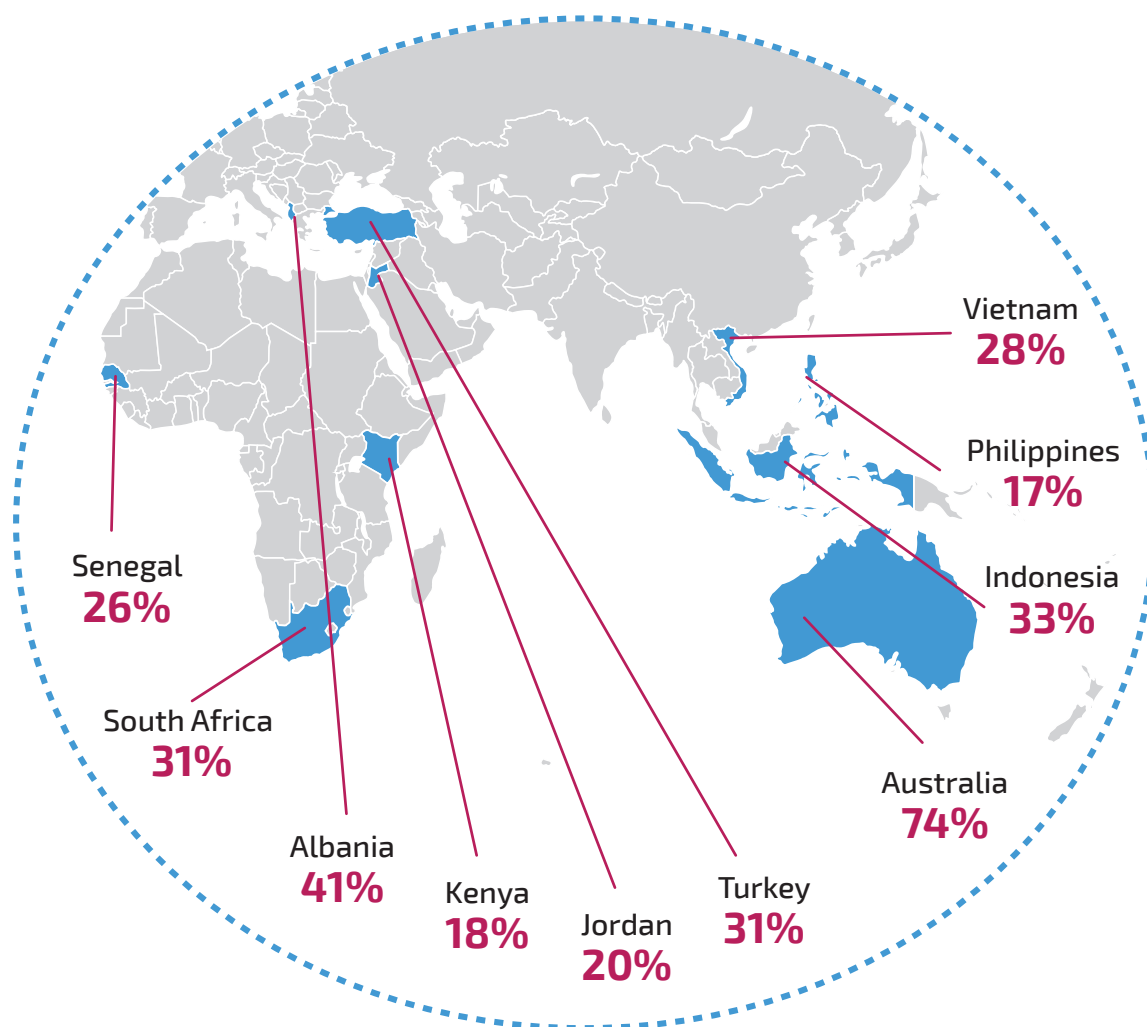
⁵ https://eeas.europa.eu/delegations/albania/61803/albania-launches-new-%E2%80%99tourism-development-programme-eu-and-ebrd-support_en

⁶ <http://www.statssa.gov.za/?p=11800>

South Africa continues to appeal to new tourism partners such as MSC Cruises who are launching a new ship in 2021.⁷

In 2019, European travellers didn't hesitate to travel to the other side of the world to discover new cultures, but that doesn't mean that short-haul destinations were left aside and forgotten.

Top 10 countries by year-on-year passenger growth for all European travellers



⁷ <https://www.moneyweb.co.za/news/south-africa/construction-on-r200m-durban-cruise-terminal-to-start-in-november-msc-cruises-confirms/>

Top short-haul* growth cities for European travellers in 2019

Greece is a major global destination of choice, with the Greek Tourism Ministry announcing a 13% increase in arrivals during the first four months of 2019.⁸ **Preveza** is our number 1 short-haul destination with a staggering 121% growth in 2019. In addition to beautiful historical sites, picturesque charm and an ideal location (bordered by bays and lagoons), Preveza will benefit from the opening of new flight routes (with Jet2 and Jet2holidays), as well as routes that remain open after the crowded summer period has passed.⁹

Taking the third position in our ranking, and with a magnificent 59% growth is the city of **Kefalonia**. The second Greek city in our top short-haul cities list, this enigmatic destination is the sixth-largest island in the country. This beautiful island is most famously known for being the setting of the romantic and memorable Hollywood film Captain Corelli's Mandolin.

Bulgaria, and more precisely **Varna**, has experienced a 60% growth. The ambition of this destination is believed to be as attractive all year round, not only during the summer months. It welcomes around 2 million visitors a year thanks to its incredible mineral springs, a rich local culture, as well as iconic culinary specialties. The contribution of tourism to the national economy is essential: 70% of the available accommodation is located on the Black Sea coast.¹⁰ The launch of new travel routes also contributes to this growth.¹¹

Zadar was a must-see city to discover in 2019. The Croatian football team had already become a recognised international entity during the 2018 World Cup, notoriety achieved in part due to their iconic captain Luka Modric, formerly from Zadar. Another potential reason for this increased attraction is low-cost airlines flooding the market (both in terms of price and in terms of the number of flights). Transavia has announced that they will be strengthening their proposition to Zadar for 2020.¹² In May 2020, Jet2 will also be launching direct flights to Zadar from London Stansted and Manchester.¹³

With two Croatian cities in our top 10, the country may have also gained visibility and public awareness as a result of the Games of Thrones series, filmed there post season 2.¹⁴

This growth in short-haul destinations reinforces the belief that Europeans prefer to take a couple of days off to fly a few hours from their homes for spectacular sights as well as relaxation

¹ <https://news.gtp.gr/2019/06/11/ministry-greek-2019-tourism-performance-robust/>

⁹ <https://news.gtp.gr/2019/10/02/aegean-committed-extend-greeces-tourism-season/>

¹⁰ <https://www.euronews.com/2018/07/12/bulgaria-an-emerging-tourist-destination>

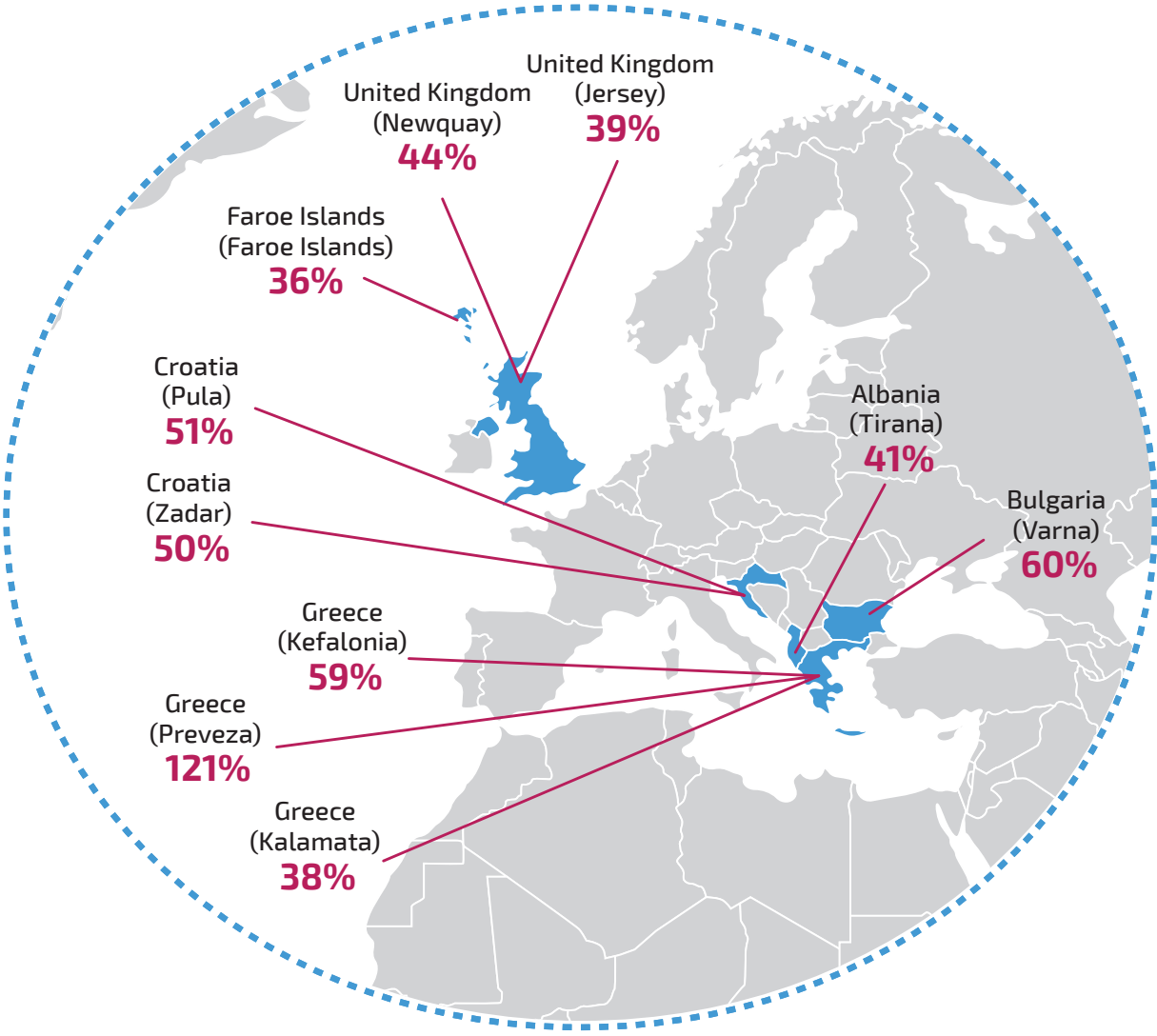
¹¹ <https://travelbulgaria.news/fly-new-destinations-varna-winter/>

¹² <https://www.total-croatia-news.com/travel/38524-zadar>

¹³ <https://www.croatiaweek.com/jet2-launching-new-flights-from-the-uk-to-zadar/>

¹⁴ <https://eu.usatoday.com/story/travel/destinations/2019/09/24/croatia-go-beyond-game-thrones-locations/2419014001/>

Top 10 short-haul destinations by year-on-year booking growth for all European travellers



*eDreams ODIGEO defines short haul flights as those booked to another country within the same continent.

Top long-haul** growth cities for European travellers in 2019

Izmir, Turkey's third-largest city, has attracted a vast score of tourists securing the number one spot in our ranking with an impressive 87% in growth. It appears that the on average 300 days of sunshine a year, two UNESCO World Heritage sites nearby (Ephesus and Pergamon), fantastic museums, food and beaches have all influenced the rise in numbers of European travellers for 2019.

The capital of Victoria, Australia's smallest mainland state, **Melbourne**, has been designated as the most livable city for seven years in a row.¹⁵ Condast Traveller readers voted for a Melbourne hotel as their first choice hotel among a list of hotels covering Australia!¹⁵⁶

Additional attractions and grandstand events should continue to engage travellers from all over the world, including the Australian Open that will be taking place in January 2020.

Australia counts another city in the top rankings: **Brisbane**. Queensland's state capital is forging its reputation and identity as a top tourist destination. Brisbane continues to break records, with more than 9 million visitors worldwide spending a record \$7.6 billion as they enjoyed the opening of new hotels and new tourist experiences across the city.¹⁷

Many sporting events featured in the calendar such as the Bledisloe Cup (Rugby), the Ashes Series (Cricket), the Rugby League World Cup finals, Brisbane International (tennis) and Brisbane World Science Festival. On a European perspective, the UK was Brisbane's third-largest market, with visitation up 1.3% to 132,000. Germany produced a 3.4% annual growth of 60,000 visitors.¹⁸

Kerala, nicknamed the "Land of the Gods", is the perfect Indian province for visitors in search of spirituality. This region is well worth a visit with its secluded temples (some 2000 years old), lush vegetation and incredible wildlife. The eDreams ODIGEO websites noted a 75% growth for **Kochi** in 2019. The campaign #Keralatales went viral with additional video stories that will only continue to help drive this growth.¹⁹

¹⁵ <https://www.abc.net.au/news/2017-08-16/melbourne-named-worlds-most-liveable-city-for-seventh-year/8812196>

¹⁶ <https://www.news.com.au/travel/australian-holidays/victoria/best-hotels-in-the-world-2019-cond-nast-travelers-readers-choice-award/news-story/7e081dd3866278006a60575715c4d67a>

¹⁷ <https://teq.queensland.com/news-and-media/latest-news/federal-tourism-data-shows-queensland-is-breaking-records>

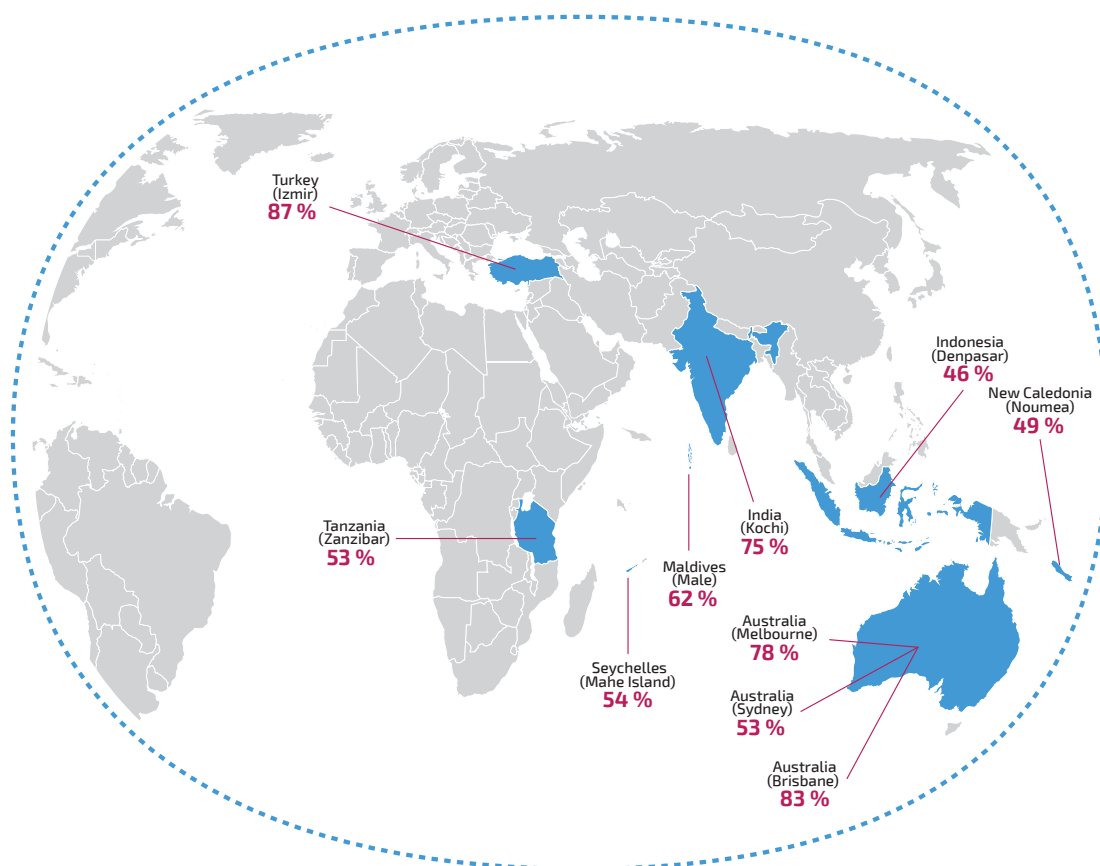
¹⁸ <https://www.businessacumen.biz/news-business-travel-events/3813-records-broken-brisbane-attracts-25-more-chinese-visitors>

¹⁹ <https://www.exchange4media.com/advertising-news/kerala-tourism-trends-with-keralatales-98040.html>

Tourism accounts for 27.9% of the Maldives' GDP ²⁰. **Male** is ranked as eDreams ODIGEO's fifth long haul destination, the starting point before reaching a dreamy sun-kissed island. Long sandy beaches, turquoise water, incredible marine life are the main attractions of these islands that only continue to grow with 14 hotel openings in 2019 alone. Travellers have a plethora of beautiful locations to discover across this picturesque landscape of wonders. ²¹

Sun seems to be one of the main drivers in this top 10, with Australia being the big winner with two of its cities being featured. Such escapes undoubtedly require preparation and anticipation, so which countries book earliest?

Top 10 long-haul destinations by year-on-year booking growth for all European travellers



²⁰ <https://edition.mv/business/12574>

²¹ <https://www.hoteliermaldives.com/14-resort-openings-maldives-look-forward-2019/>

**eDreams ODIGEO defines long haul flights as those booked to another country within another continent.

The Danish book the earliest

The Danish are a nation known to book earliest in advance of a short or long trip. Our report notes that on average the Danes booked 45 days ahead of journeys less than 6 days in duration and 66 days for trips over 6 days.

In comparison, for short trips, Italian travellers are the most spontaneous leaving 32 days on average, and for long trips, the Portuguese book the latest with 43 days on average.

As in 2018, January and February remained the two months when travellers booked the furthest in advance.

The average advanced booking time for short breaks increased from 46 days in January 2018 to 50 days in January 2019 - while advanced booking for long breaks also increased from 62 days in January 2018 to 71 days in January 2019.

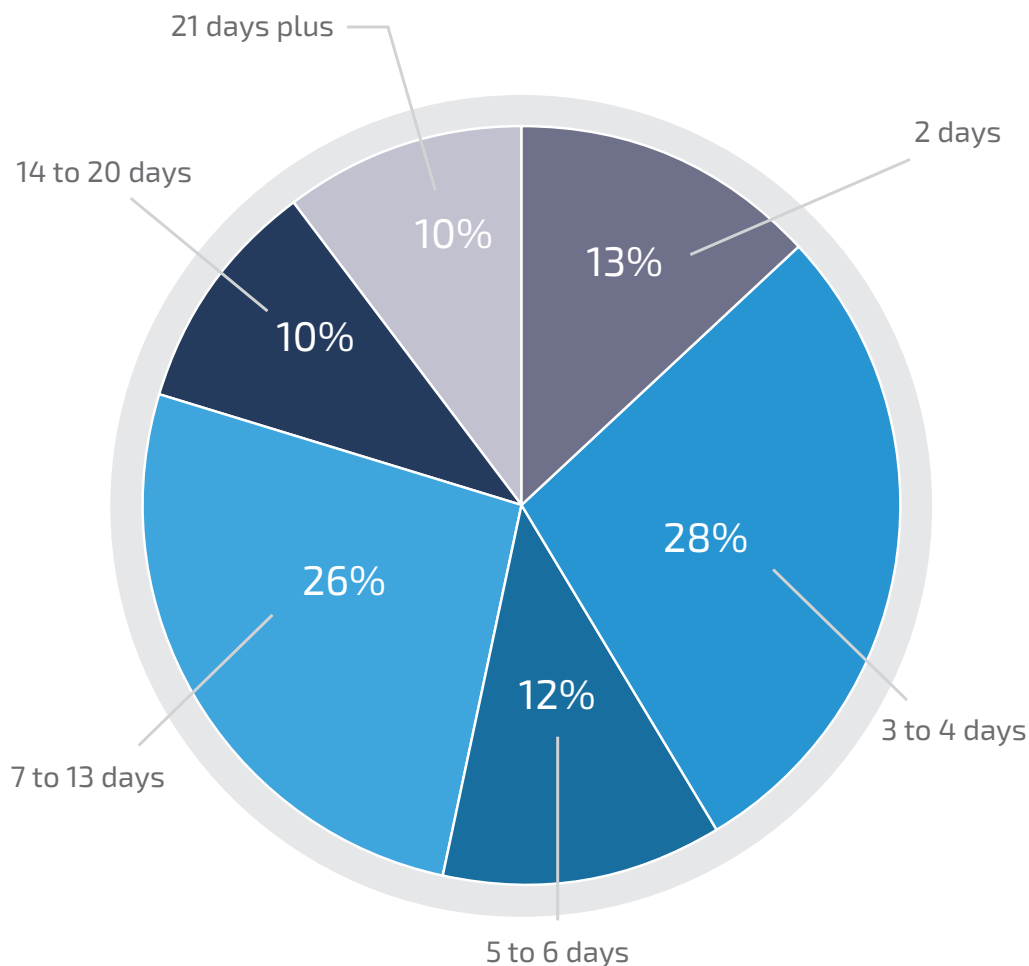
Spontaneous or anticipated, each European nation has its own unique habits. But what about the duration of their trip, do they prefer short trips throughout the year or do they prefer to fly away for several weeks at a time?

Short breaks are still the European favourite

On a European scale, short breaks were the most popular holiday option for 2019 as it was in 2018, with 28% of all bookings spanning 3 and 4 days in duration. Mid-length trips came in second place, with 26% of all bookings spanning 7 and 13 days in length.

In 2019, although the 3 to 4 day breaks were the most popular among all European countries, the UK, France, Switzerland & Denmark stand out with a preference for 7 to 13 day breaks rather than the shorter favourite.

European holiday length options



A look ahead to 2020

Predictions for 2020 holiday hotspots (booked in 2019)

Looking at early bookings made by European travellers (flights purchased the year before travel), it is possible to gain an indication of the cities which are most likely to receive a tourism boost in 2020.

Our research focuses the attention on three impressive cities that have developed exciting plans for tourism in 2020, including a broad range of sporting events and ambitious government initiatives.

The Empire of the Rising Sun radiates across the globe; its capital **Tokyo** is particularly in the spotlight in 2020 with a 90% growth of European tourists from our websites. The Rugby World Cup 2019 hosted in Japan provided exceptional focus to the country, flight bookings to Japan from the competing nations grew by 38.1% ahead of where they were, during the equivalent period last year (12th September to 6th November).²² We will see how the upcoming 2020 Olympic Games in Tokyo continue to boost the destination. It seems the country has big ambitions to attract 40 million visitors by 2020 and a further 60 million by 2030!²³

Senegal has a lot to offer, with historical and cultural destinations such as the Island of Gorée, the colonial city Saint-Louis, the Sally or Casamance beaches, safaris and much more on offer. The government aims for Senegal to be in the top five African tourist destinations, achieving at least three million visitors a year by 2023.²⁴ To reach these objectives, Air Senegal plans to open new European routes to **Dakar** in December 2019: Marseille in France and Barcelona in Spain.²⁵ During the IFTM Top Resa in Paris in October 2019, the Minister of Tourism Alioune Sarr announced several projects including the opening of airline routes in 2020 to Geneva and New York, 200 new rooms to come at the club med Cap Skirring, as well as the opening of three schools linked to the travel industry.²⁶ With such an impressive program of initiatives planned in, the destination should continue to gain in public attention throughout 2020 and beyond.

Another city, with its sights firmly set on driving tourism over the coming years is **Tel Aviv**. The destination named as the 'Mediterranean Capital of Cool' registered a 17% increase in bookings for travel in 2020. Indeed, in June 2019, Tel Aviv Mayor Ron Huldai presented a plan to increase tourism over the next decade. The objective of the project "Tel Aviv-Jaffa 2030" is to position the city as one of the most popular urban destinations in the world by incorporating new tourist attractions and accommodation. The goal is to double the number of hotel rooms from the current 10,500 within a decade.²⁷

²² <https://en.mercopress.com/2019/10/02/the-rugby-world-cup-fuels-a-boom-in-japan-s-tourism>

²³ <https://skift.com/2019/01/23/how-japan-is-transforming-its-visitor-economy-for-the-next-wave-of-tourism/>

²⁴ <http://www.dotynews.com/focus/senegal-a-rising-star-for-tourism-investment#>

²⁵ <https://simpleflying.com/air-senegal-growth/>

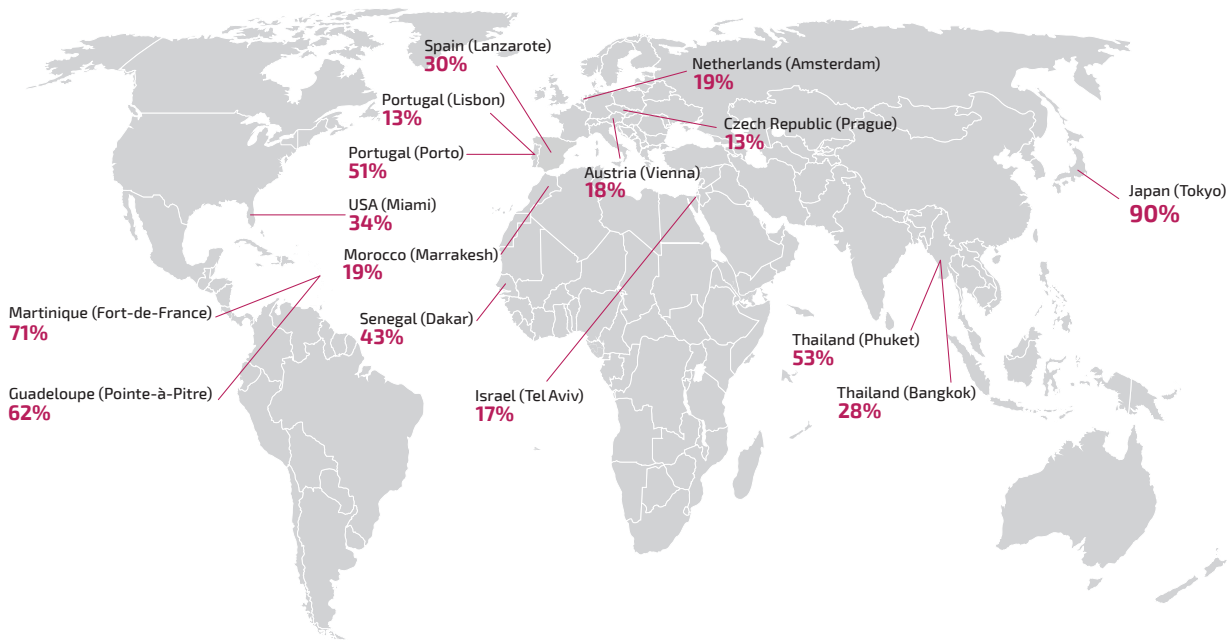
²⁶ https://www.francetvinfo.fr/monde/afrique/economie-africaine/le-senegal-met-ses-infrastructures-a-niveau-et-multiplie-les-offres-de-tourisme_3644487.html

²⁷ <https://travelwirenews.com/tel-aviv-in-2030-city-releases-master-plan-for-increased-tourism-1480916/>

In 2019 Tel Aviv hosted the Eurovision Song Contest – which enabled the municipality to enhance the tourist attractions of the city.

The Ben Gurion Airport (Tel Aviv) will be expanded. Transportation Minister Israel Katz was quoted by Channel 12 as saying: "I have approved an investment plan worth NIS3bn (\$840m) for the Israel Airports Authority to be ready for the increase of up to 30 million passengers a year, and to be prepared for a later increase of up to 35 million passengers."²⁸

Top 15 destinations for growth in 2020



²⁸ <https://www.airport-technology.com/news/ben-gurion-airport-expansion/>

Methodology

The eDreams ODIGEO 2019 European Traveller Insights Report is collated utilising booking data from the company's online travel agency brands (eDreams, Opodo, Go Voyages and Travellink). It covers the periods from January 2018 to September 2018, and January 2019 to September 2019 with data from major European markets.

The main European markets are Denmark, Finland, Sweden, Norway, France, Germany, Austria, Switzerland, Portugal, Spain, Italy and the UK.

About eDreams ODIGEO

eDreams ODIGEO is one of the world's largest online travel companies and one of the largest European e-commerce businesses. Under its four leading online travel agency brands – eDreams, GO Voyages, Opodo, Travellink, and the metasearch engine Liligo – it offers the best deals in regular flights, low-cost airlines, hotels, cruises, car rental, dynamic packages, holiday packages and travel insurance to make travel easier, more accessible, and better value for the 18 million customers it serves across 46 markets. eDreams ODIGEO is listed on the Spanish Stock Market.

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