

What is the demand for outbound tourism on the European market?

As a large source market, Europe offers many opportunities for tourism entrepreneurs in developing countries. Germany, the United Kingdom and France are the largest markets. From Europe as a whole, outbound tourism is expected to grow. The highest growth rates are expected in Eastern Europe.

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1. What makes Europe an interesting market for tourism?

Tourism in developing countries is growing fast. In 2018, tourism arrivals in emerging economies were 7.2% higher than in 2017, making for a total of [45.8% of the global share](#). The European Union (from here: EU) offers a huge market, as it was responsible for 31.7% of all international tourist departures worldwide in 2017.

Tip:

Read [our study on requirements](#) to learn more about which requirements you need to comply with to entry the European market.

European outbound trips

In 2017, European outbound tourism (tourism trips to other countries) increased by 4.4% compared to 2016 to a total of over 464 million trips. Out of these trips, almost 13% had a developing country destination.

Based on [UNWTO statistics](#), European tourism to developing countries increased by 4.6% in 2017, after a decline in 2015 and 2016. This increase can be explained by the prospering European economy and more safety and stability in some North African destinations. Countries close to the EU like Egypt, Morocco, Albania and Tunisia profited most.

According to the [travel organisation Odigeo](#), short trips of between two and six days are most popular. In 2018, 53% of European travellers booked a short trip. 26% travelled for one to two weeks, and 20% travelled for more than two weeks. Of course, European tourists stay longer as they need to travel further.

Tips:

Focus on two to three European priority countries. The European source market consists of many countries with different characteristics.

Check your country's air connectivity, when selecting a target country in the EU. Can travellers easily reach your country and are flights affordable?

The forecast on European outbound tourism is positive

On the short term, the forecast on European outbound tourism is very positive. In 2019, the amount of outbound trips is expected to rise by 6%. The forecast is most positive for [Poland, Sweden, Russia, Italy, Germany and Austria](#).

In the long term (until 2030), we expect European outbound tourism to grow further due to economic growth, especially in Eastern Europe. In general, the European outbound tourism market is expected to grow by 2-3% per year. The number of trips to developing countries is expected to rise faster, with a growth rate of 3-5% per year. The prognoses differ greatly per country and per region, as we will discuss in the following sections: Trips to Africa and the Middle East, Trips to Asia and Trips to Latin America.

Main threats to the growth of tourism to developing countries:

- Reduced wealth and increased uncertainty of British citizens caused by the United Kingdom leaving the EU (Brexit)
- Political instability and insecurity in developing countries
- Political regulation (like taxes on flights and CO2) and changing consumer attitude caused by climate change

Tip:

Read more in the CBI [study on trends offering opportunities](#) for developing countries.

Main developing country destinations for EU citizens

The developing countries attracting most tourists from the EU are Turkey, Thailand, Ukraine, Morocco, China and India. Together, they account for more than 50% of all EU tourists traveling to developing countries.

Where Thailand showed an average growth rate of 7.8% between 2015-2017, the amount of EU visitors to Turkey dropped by an average of -16.3% in the same period. This drop in the Turkish tourism sector was mainly caused by political and security concerns. Recently, however, the Turkish tourism sector has recovered, mainly due to the falling Turkish lira. In the short term, the forecast is that the Turkish tourism sector will recover quickly from the drop in 2016 and 2017.

Tip:

See our study on [analyses of air flows of European travellers](#) to find out how many Europeans fly to your destination.

Trips to Africa and the Middle East

European tourism to Africa and the Middle East greatly depends on the political stability of the region. Due to an ongoing politically instable situation in some countries, terrorist attacks on tourists and the war with Islamic State (ISIS), tourism numbers to North Africa and the Middle East have dropped dramatically. Examples are Egypt, Tunisia and Jordan. As a region, however, North Africa is still very important for European tourism and rebounding fast.

Market access can be a problem, mainly in Africa. Mainstream tour operators have the bargaining power to

dominate the market. For small and medium-sized businesses, it is hard to gain a foothold. Companies with business partners in Western Europe or in the United States have a better chance of survival.

Morocco shows very high tourism numbers, especially from Spain and France. These numbers increased even further by 8% in 2018. In the short term, further growth is uncertain, due to [the murder of two European tourists](#) in December 2018 and political instability in the region. Furthermore, the country is expensive for tourists compared to other North African countries.

Although there are many concerns, [the forecast for Egypt is mainly positive](#). After a major drawback, tourists are returning to Egypt, with a very high average annual growth rate of 33% between 2016–2018. On the other hand, Egypt is still considered an unsafe country by many outbound travellers.

Namibia is expected to have [a very high growth rate of 43%](#) in 2019 from European tourists. Most European tourists travelling to Namibia come from Germany (over [120,000 tourists in 2017](#)), followed by the United Kingdom and France (both [over 30,000 tourists in 2017](#)). In total, European travellers accounted for [about 20%](#) of total visitor arrivals in 2017. A main reason for this growth is Namibia's ability to [realise sustainable tourism](#).

Tips:

Make sure to be flexible in your contracts. Political and other events in your country or the region may have a huge impact on European tourist arrivals.

Be aware of political events in the broader region. Political events in neighbouring countries may hugely affect your revenues from European tourists.

Read [our tips on how to manage risks in tourism](#) to learn how to deal with a fluctuations in tourism offers.

Set up partnerships with European tour operators, alone or together with others. [Abang Africa Travel](#) is an example of a network of different tour operators which has managed to bring European and local tour operators together in order to provide sustainable tourism.

Trips to Asia

Europe is an important source of tourism for Asia, as it contributes about 10% to the total amount of tourists. Between 2016 and 2017, the amount of travellers from Europe to developing countries in Asia (excluding the Middle East) grew by 2.8%. Also, the forecast for Asia is positive, as it is expected to rise by [4.2% yearly until 2022](#).

Table 1: Top 10 Asian developing country travel destinations for European travellers

Destination	Amount of travellers in 2017	Growth rate between 2016–2017
Thailand	4,521,506	-0.1%
China	3,274,412	0.9%

India	2,219,628	5.6%
Indonesia	1,614,731	9.3%
Vietnam	1,122,185	11.0%
Malaysia	983,171	-4.2%
Mauritius	760,830	6.2%
Cambodia	758,416	9.9%
Sri Lanka	733,093	-0.4%
Korea	627,601	-5.4%

Source: based on figures from the World Tourism Organisation

Number 11 in our list (not mentioned in Table 1) is the Philippines. European visits have risen by 7% in 2019. According to Odigeo, the amount of European travellers is expected to increase further by 40% in 2019. Other sources confirm less spectacular growth rates, although they are still high. Important reasons for these high growth rates include the reopening of [Boracay Island](#) and [successful marketing campaigns](#).

Although most Asian countries are doing well, Laos (number 16 of the most visited Asian countries) showed a decline of over 30% in the number of European tourists between 2016 and 2017. In 2018, this decline had even worsened. The main reason is that Laos was struck by [several natural disasters](#) in the last years.

Tip:

Read the [Horwath HTL Market Report on Asia Pacific](#) to obtain more insights into travel trends and statistics for Asia.

Trip to Latin America

South American tourism is booming, as it grew by 5.5% in 2017. European citizens contributed to this growth with a total of over 10 million travellers to Latin America. Also, tourism to Latin America is [expected to grow](#) until 2022.

Table 2: Top 10 Latin American developing country travel destinations for European travellers

Destination	Amount of travellers in 2017	Growth rate between 2016-2017
Mexico	2,149,696	7.3%

Brazil	1,388,141	-8.6%
Dominican Republic	1,128,861	4.3%
Argentina	893,561	-2.2%
Peru	616,186	3.6%
Colombia	464,450	11.8%
Costa Rica	439,367	7.0%
Jamaica	322,109	10.6%
Panama	247,858	7.9%
Ecuador	223,737	0.9%

Source: based on figures from the World Tourism Organisation

While Brazil is the country in Latin America attracting most tourists from all over the world, Mexico receives most European tourists. One of the contributors to this difference is the bad reputation that Mexico has in the United States, which is one of the most important sources of tourism to Latin America.

Venezuela (which was number 14 in our list of best performers in 2017) experienced a drop of over 40% in European tourism arrivals between 2016 and 2017, a number that [has decreased ever since](#). Due to the tense political situation, we do not expect any improvement soon.

The reasons for the high growth numbers in Latin America are diverse, ranging from governmental efforts to [improve the infrastructure \(Mexico\)](#), to increased safety and [smart offerings by entrepreneurs \(Colombia\)](#).

The main tourism types that visitors are looking for in South America are

- [nature tourism \(25%\)](#)
- [adventure tourism \(23%\)](#)
- history and [cultural tourism \(22%\)](#)
- [gastronomic tourism \(18%\)](#)

Tips:

Always consider safety aspects when attracting European customers. Be aware that many European travellers consider Latin America an unsafe destination.

Offer a unique experience, like [high-altitude training in Peru](#) or a [Narcos tour](#) in Colombia.

2. Which European markets offer most opportunities for tourism?

Europe is diverse and offers many markets. The largest markets are Germany, the United Kingdom and France, followed by Italy, Spain and the Netherlands. Eastern European tourists are most willing to travel to developing countries, although they mainly focus on a few neighbouring countries.

Germany, the United Kingdom and France are the main EU markets

For developing countries, Germany, the United Kingdom and France are by far the largest markets. Together, they account for almost 50% of the European trips to developing countries. The developing country destinations in these markets are very diverse. This shows that visitors from these countries may also book via your company if your offer is attractive to a certain target group.

Germany

Many German tourists have a focus on Turkey, although many other developing countries are visited as well. This can partly be explained by the high amount of trips to visit friends and relatives.

Source: based on UNWTO statistics. Where statistics of 2017 were not available, figures were based on previous years

With around 82 million citizens, Germany is the largest country within the EU in terms of population. Germany is also by far the largest economy in the EU and the fourth economy in the world, with a gross domestic product of €3.3 trillion.

When attracting German tourists, you need to know a few things about German culture. German tourists generally don't like uncertainty. They tend to read a lot before visiting a place. They are, like most Europeans, direct in their communication, and are well known for their tendency towards organisation and punctuality.

German travellers prefer active holidays (like walking), with 37% preferring sun & beach holidays, 36% going to visit friends and relatives and 30% preferring nature tourism, the German tourist very much resembles the average European. In 2016, only 37% booked their holiday online.

Tips:

If you want to attract German travellers to your destination, make sure you deliver on time.

Provide your German customers with a lot of information, like for example information about additional payment not included in the total price, services offered, the quality of the accommodation(s) and [much more](#).

Offer well-organised tours without too many surprises.

Read the [Market and Trade Profile Germany](#) by VisitBritain for a detailed profile of the German traveller, insights into their booking behaviour and details on how to reach them.

France

The French are even more diverse in their choice of developing country destinations, partly due to their colonial history.

France has the third largest population within the EU, with about 65 million inhabitants. It is also the EU's third economy and the seventh largest economy in the world. Its gross domestic product is €2.3 trillion(2018). The French share some cultural aspects with the Germans. For example, both people are for example very straightforward in their communication (you may also [consider it rude](#)). However, the French prepare their holidays in a different way. The French are more spontaneous. Trips with a length between two and five days are on average booked [36 days in advance](#). Trips of between one and two weeks are generally booked [48 days before departure](#).

48% of all French tourists see visiting friends and relatives as the most important reason for their holiday. This is relatively high compared to the average EU citizen (38%). Especially former colonies, like Morocco and Tunisia, profit from these visitors.

In a [poll by Eurobarometer](#), natural features/nature (58%) and cultural and historical attractions (36%) were mentioned most often as reasons to return to the same destination for a holiday (compared to 45% and 31% for the EU in total).

Tips:

Offer your information in French. Especially older French visitors are proud of their language.

Read the [Market and Trade Profile France](#) by VisitBritain for a detailed profile of the French traveller, insights into their booking behaviour and details on how to reach them.

Seduce the French with beautiful nature trips. Do so by [writing travel blogs](#). An interesting platform in France is [Votre Tour du Monde](#).

United Kingdom

Partly due to their shared history, India and South Africa are relatively important destinations for the British.

With a population of 66 million and a gross domestic product of € 2.321 trillion, the United Kingdom just exceeds the population and economy of France, making it the fifth largest economy in the world and the second in Europe.

The British share their love for their country with the French and tend to speak no other language than English. The UK is trying to leave the European Union (Brexit), but there is still no deal with the European Union. Leaving the European Union will probably have a [huge impact on the British economy](#), especially in the short term.

Tips:

Invest in proper English information. Automatic translation by for example [Google Translate](#) may be helpful, but is not accurate enough. It is essential to attract British tourists, and it is the most accepted language in Europe.

Stay up to date on [Brexit news](#).

Italy, Spain and the Netherlands are the next top markets

Almost two third of all tourists to developing countries come from the main six markets, which also include Italy, Spain and the Netherlands.

From these countries, the Netherlands had the smallest growth rate per year between 2013–2017 (0.3%) and Spain had the largest growth rate (7.3%). Morocco profited by far the most from this increase in Spanish tourists to developing countries, as the number of visitors rose by almost 100,000 between 2016 and 2017. Relatively, Albania profited most, as the number of visitors almost doubled in this period. The total amount of Spanish visitors, however, was just over 20,000 per year.

Although these countries are still the largest sources for tourists traveling to developing countries, the willingness to travel to developing countries declined slightly between 2013–2017, up to a maximum of -1.0% yearly for the United Kingdom.

An interesting fact is that tourists from the Netherlands show the highest willingness to travel to developing countries per capita. Almost one out of every five trips (18.3%) had a developing country destination in 2017. This was followed by the United Kingdom (14.9%), France (12.1%) and Germany (11.9%). In Spain (6.8%) and Italy (5.4%), the amount of trips to developing countries per capita was much lower.

People from the Netherlands are travel-minded by nature. On average they take 2.82 holidays per year, [spending €13.8 billion per year on outbound travel](#). Most is spent by the 45–64 age group. Some trends in the Netherlands are an increase in do-it-yourself holidays, luxury travel and intercontinental travel. Over 80% of tourists book their holiday online, according to the [Market and Trade Profile Netherlands](#) by VisitBritain (which is a must-read if you wish to attract Dutch travellers).

More than other EU citizens, the Dutch go on holiday for nature (50% versus 31%) and culture (39% versus 26%). They are less interested in wellness and health during their holidays (3% versus 13%) compared to other EU citizens. As price is relatively important to attracting Dutch tourists on their first trips, nature is by far the most important aspect to make tourists return, also in comparison to other EU citizens (53% versus 45%).

Tips:

Target the Netherlands if your aim is maximum efficiency with a limited marketing budget.

Attend tourism trade events in these countries, especially [ITB](#) in Germany, [WTM](#) in the United Kingdom, [Top Resa](#) in France and [Vakantiebeurs](#) in the Netherlands.

Focus on specific product market combinations within these source markets, as there is a lot of competition out there.

Eastern European tourists often visit developing countries

Some Eastern European countries are the source of relatively many tourist visits to developing countries. In 2017, many tourists travelled to developing country destinations from Greece (31.4%), Hungary (29.6%), Bulgaria (22.7%) and Poland (21.5%). With the exception of Poland, these countries showed very high growth rates as well. Between 2013–2017, the annual growth rate of tourists visiting developing countries was 3.3% for Greece, 4.2% for Bulgaria and even 9.3% for Hungary. Most travellers from these countries were first-generation travellers. They generally chose mainstream holidays like sun & beach holidays and city trips.

It is important for you to realise that tourists from these countries focus on a few developing country

destinations. Most of their destinations are neighbouring destinations. Out of all Hungarian developing country tourists, 82.3% visit Ukraine. Bulgarian tourists who visit a developing country also have a very specific focus - about 90% visit Turkey. While Greek developing country visitors also show much willingness to visit Turkey (48.0%), many Greeks travel to neighbouring Albania (37.6%). Polish developing country visitors mostly visit Ukraine (46.5%), followed by Belarus (18.1%) and Turkey (12.0%).

Tips:

Focus on tourists from European countries nearby (if possible). They show great willingness to visit your country.

See our study about [outbound tourism from emerging Eastern European countries](#).

3. Which holiday types have most potential on the European tourism market?

Within the tourism sector, many different holiday types can be mentioned. For European travellers, sun & beach holidays are most popular. Furthermore, some interesting niche markets, like adventure tourism, cruises and food tourism, are on the rise.

Sun & beach holidays are the most important holiday type

Out of all Europeans travelling to developing countries, 25.1% chooses a sun & beach holiday. The expectation is that the number of people who book this type of holiday will rise by 8% in 2019. Sun & beach holidays are followed by holidays to visit friends and family, which form 23.3% of the total. For developing countries, this type of holiday will be less prevalent, except when your country has strong ties with a European country. In general, the number of holidays to visit friends and family is expected to rise by 5% in 2019. Nature tourism is an important holiday type. It is even more important for developing country destinations and is expected to grow as well.

Table 3: Types of holidays taken by European tourists

Holiday type	Percentage
Sun & beach tourism	25.1%
Visiting friends and relatives	23.3%
Nature tourism	13.3%
Cultural tourism	9.8%
City trips	9.1%
Wellness, spa and health treatment	5.4%
Sport-related tourism (like surf tourism or golf tourism)	4.0%

Other types of tourism	6.6%
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Source: based on figures from [Eurobarometer](#) and the World Tourism Organisation

Most European tourists enjoy a combination of holiday types, like Europeans who visit Thailand for a sun & beach holiday, but also to enjoy nature and visit a city.

Tips:

Focus on a specific holiday type. Either choose a main market or a niche market, such as the multi-generation holiday market (mostly in Western European markets). Multi-gen groups tend to spend more money than other groups. To attract these groups, you need to offer a diverse set of activities and accommodations that supply privacy as well as connecting rooms.

Offer a unique experience. Although sun & beach tourism is still the largest tourism type, the importance of pure leisure holidays is in decline. You can do so by bringing tourists into contact with locals. There are [many ways](#) to do this.

Holiday types differ per European country

It is important to realise that preferences differ per country. Although sun & beach tourism is preferred in most countries, we can distinguish a Top 3 per holiday type.

Table 4: Top 3 country preference per holiday type

Holiday type	Top 3	Percentage
Sun & beach tourism	1. Slovenia	52%
	2. Croatia	36%
	3. Greece	35%
Visiting friends and relatives	1. Estonia	35%
	2. Latvia	33%
	3. Finland	30%
Nature tourism	1. Czech Republic	26%
	2. Netherlands	25%
	3. Bulgaria	23%

Cultural tourism	1. Spain	16%
	2. Malta	15%
	3. Estonia	15%
City trips	1. Cyprus	20%
	2. Finland	17%
	3. Italy	17%
Wellness tourism	1. Iceland	19%
	2. Hungary	16%
	3. Portugal / Slovakia	15%
Sport-related tourism	1. Iceland	10%
	2. Austria	10%
	3. Czech Republic	9%

Source: based on figures from [Eurobarometer](#) and the World Tourism Organisation

Although the preferences in Table 4 may help you find a suitable target market, you need to realise that not all these people travel to developing countries. For example, Slovenian tourists, who highly prefer sun & beach holidays, spend most holidays on their own beaches as well as on Italian beaches. However, they may still be an interesting target. In 2017, about 40,000 Slovenians visited Turkey or Albania.

Visiting friends and relatives

Visiting friend and relatives ([VFR](#)) can be seen as a sustainable form of tourism. The demand is relatively stable (less seasonal), trips are generally longer and they encourage local tourism, because the host and the tourist often enjoy trips together. Tourists visiting friends and relatives in your country often become ambassadors in Europe, encouraging 'regular' tourists to visit your country as well.

Although the Top 3 for visiting friends and relatives consists of Estonia, Latvia and Finland, developing countries that have historical connections with Europe will profit most from this type of tourism. Some important examples are Turkish 'guest workers' in Germany returning, or Moroccan immigrants living in France visiting their families.

Tips:

Target a European country where your offer will be popular. Read more about preferential differences across countries [in the Eurobarometer survey](#).

To get started, read [our tips for finding European buyers](#), or read [our tips on how to do business with](#)

European buyers.

Cruises, adventure tourism and food tourism are interesting holiday types

Besides the main holiday types mentioned above, there are many more interesting markets. We have selected some sectors with high growth rates. More information can be found in [our studies on promising segments](#).

Cruises

European cruises are booming. Around [6.7 million Europeans](#), mostly tourists from Germany and the United Kingdom, go on a cruise each year. Although many of these tourists stay in Europe or visit North America, South America and Asia are also common destinations. In total, European cruise tourists spend more than €12 billion on their holidays. The forecast for European cruise tourism is positive, as it is expected to rise to 7.1 million passengers in 2020.

A drawback of cruise tourism is that large European tour operators profit most from these tourists. Cruise tourists spend only about 8% of their holiday budget in your economy. However, there are also smaller river cruises, like [Taonga Safaris](#), which contribute more to the local society.

Another disadvantage of cruise tourism is that big cruise ships emit large volumes of CO₂, and there is an increasing demand among European travellers [for sustainable holidays](#). Smaller river cruise ships cause less pollution. Still, sustainability will be an important issue when attracting European customers. A simple example of a sustainability policy, which you can use to write your own, can be found on [the Travel Foundation website](#).

Tips:

Target European cruise operators, but make sure that you have sufficient capacity to deal with many tourists in a short period of time.

Spend much effort on partnerships with local tourism companies if your aim is to start a local river cruise. They may be your main source of clients.

Read [our study on cruise tourism](#) to gain more insight into this sector.

Read [a column on Trip Savvy](#) for some inspiring examples of local cruises.

Develop a sustainability policy and communicate this to your stakeholders.

Adventure tourism

Adventure tourism is another tourism product that is on the rise. Worldwide, adventure tourism had a growth rate of [21% per year between 2012-2017](#). This product is very important for developing country destinations in particular. According to UNWTO, 57% of all adventure trips is expected to have a developing country destination in 2030, which equates to 900 million visitors to developing countries.

According to [ATTA](#), Europe is a major source market, contributing 40% of all clients of African adventure travel tour operators, and 32% of all South American tour operators.

Adventure tourists also contribute highly to the local economy, spending more than twice the amount of money in local markets compared to package tourists. According to ATTA, about 66% of the trip costs remain in the

region of the destination. Especially the southern part of Africa is a main destination for European adventure tourists, as are Eastern Europe and South East Asia.

Families, multi-generational groups and [solo travellers](#) are the main customer groups for adventure tourism. Major activities are hiking, eco-tourism, cycling and safaris. The preference, however, differs per region. While safaris are the preferred activity in Africa, hiking is most preferred in Asia. [Tripsavvy](#) offers an inspiring description of several types of adventure travel.

Tips:

Target European adventure tourists, as they spend more money in your economy than regular tourists.

Read [our study on adventure tourism](#) to gain more insight into this sector.

Make sure your tours are well-organised, as European tourists are very demanding.

Have a [safety and risk management plan](#). All tourism (but especially adventure tourism) does involve some risk. Especially in Africa and Europe, many companies do not have such a plan yet.

Food tourism

Food tourism, which is closely related to gastronomy tourism and culinary tourism, is an important aspect for many tourists, mainly cultural tourists. Although there are only few tourists who see the culinary experience as the sole goal of their travel, 80% of all tourists see culinary activities as a motivator to visit a certain area. Some major developing country food tourism destinations are Mexico, India, South Africa, Thailand and Turkey.

There are many ways to boost food tourism. In a UNWTO poll among experts, food events showed the most promise, followed by cookery workshops and food tours.

Table 5: Gastronomic activities you can organise, as recommended by experts

Gastronomic activity	Percentage
Food events	79%
Gastronomic routes/food tour	62%
Cooking classes and workshops	62%
Food fairs featuring local products	59%
Visits to markets and producers	53%
Museums	12%
Presentations	6%

Other	20%
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Source: based on figures from the World Tourism Organisation

For inspiration, you may want to visit the websites of travel organisations like [World Expeditions](#), which offer organised trips to discover the culinary offerings of a country. The [UNWTO Global Report on Food Tourism](#) offers you many inspiring examples and tips, with a focus on your country.

Tips:

Increase your attractiveness to food tourists in cooperation with other entrepreneurs. Because food tourists seek diversity, you cannot do this on your own.

Read [our study on culinary tourism](#) to gain more insights into this sector.


Organise food-related activities, such as food events and food tours.


Ensure a variety of booking channels to communicate your offer, because the [booking behaviour is changing](#).


This study has been carried out on behalf of CBI by [Molgo](#) and [ETFI](#).

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