

WORLDWIDE DIGITAL TRAVEL SALES

**eMarketer's Estimates for
2016–2021**

JULY 2017

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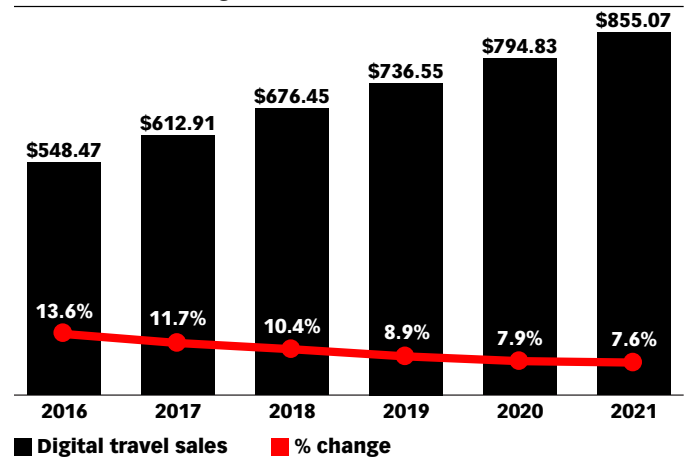
WORLDWIDE DIGITAL TRAVEL SALES: EMARKETER'S ESTIMATES FOR 2016–2021

eMarketer estimates worldwide digital travel sales—which include leisure and unmanaged business travel sales booked via any device—will rise by 11.7% in 2017 to nearly \$613 billion. Gains will continue throughout the forecast period, driven primarily by strong growth in Asia-Pacific.

- Asia-Pacific will surpass North America to become the No. 1 digital travel market in the world this year. This is due mainly to strong sales gains in China and India.
- On a country-by-country level, the US will still account for the largest share (30.9%) of worldwide digital travel sales in 2017. China is closing in, however, and each country will make up roughly a quarter of sales by the end of 2021.
- Despite safety concerns due to recent terrorist attacks, Western Europe remains a popular travel destination. Digital already represents a sizable share of the region's travel market, and sales will continue to grow through the end of the forecast period.
- Argentina is Latin America's fastest-growing digital travel market, and sales will keep rising as currency controls and import barriers continue to be lifted. Brazil will remain the regional leader in terms of total sales, however.
- Two major sporting events in Russia are expected to draw both foreign and domestic travelers to the country, boosting digital travel sales growth in Central and Eastern Europe in 2017 and 2018.

WHAT'S IN THIS REPORT? This report includes eMarketer's forecast for worldwide digital travel sales. The projections, which run through 2021, include breakouts by region and country. eMarketer's data on worldwide digital travel sales can be found in this [report's accompanying spreadsheet](#).

Digital Travel Sales Worldwide, 2016-2021
billions and % change



Note: includes leisure and unmanaged business travel sales booked via any device, regardless of the method of payment or fulfillment
Source: eMarketer, July 2017

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KEY STAT: Worldwide digital travel sales will total \$612.91 billion in 2017, up 11.7% from last year. Steady growth will continue through 2021, when sales will reach \$855.07 billion.

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WORLDWIDE OVERVIEW

eMarketer estimates worldwide digital travel sales will increase 11.7% in 2017 to \$612.91 billion.

Growing demand for travel among rising middle-class populations in emerging markets, particularly in Asia-Pacific, will drive continued sales growth through the end of the forecast period.

This year, Asia-Pacific will account for more than one-third (34.9%) of worldwide digital travel sales, ahead of North America (32.6%) for the first time. Western Europe will remain in third place with a 23.1% sales share, followed by the Middle East and Africa (4.3%), Latin America (4.0%) and Central and Eastern Europe (1.1%).

Digital Travel Sales Worldwide, by Region, 2016-2021

	2016	2017	2018	2019	2020	2021
Digital travel sales (billions)						
Asia-Pacific	\$174.80	\$214.07	\$253.56	\$290.66	\$326.98	\$366.64
North America	\$190.40	\$200.05	\$209.20	\$217.73	\$225.53	\$232.49
Western Europe	\$133.99	\$141.68	\$148.05	\$153.44	\$158.04	\$161.61
Middle East & Africa	\$22.30	\$26.07	\$30.40	\$35.39	\$41.02	\$47.42
Latin America	\$20.86	\$24.32	\$27.45	\$30.73	\$33.98	\$37.04
Central & Eastern Europe	\$6.11	\$6.72	\$7.80	\$8.59	\$9.29	\$9.87
Worldwide	\$548.47	\$612.91	\$676.45	\$736.55	\$794.83	\$855.07
Digital travel sales growth (% change)						
Asia-Pacific	26.2%	22.5%	18.4%	14.6%	12.5%	12.1%
Middle East & Africa	17.3%	16.9%	16.6%	16.4%	15.9%	15.6%
Latin America	21.3%	16.6%	12.9%	11.9%	10.6%	9.0%
Central & Eastern Europe	9.4%	10.0%	16.0%	10.2%	8.1%	6.3%
Western Europe	7.1%	5.7%	4.5%	3.6%	3.0%	2.3%
North America	7.5%	5.1%	4.6%	4.1%	3.6%	3.1%
Worldwide	13.6%	11.7%	10.4%	8.9%	7.9%	7.6%
Digital travel sales share (% of total)						
Asia-Pacific	31.9%	34.9%	37.5%	39.5%	41.1%	42.9%
North America	34.7%	32.6%	30.9%	29.6%	28.4%	27.2%
Western Europe	24.4%	23.1%	21.9%	20.8%	19.9%	18.9%
Middle East & Africa	4.1%	4.3%	4.5%	4.8%	5.2%	5.5%
Latin America	3.8%	4.0%	4.1%	4.2%	4.3%	4.3%
Central & Eastern Europe	1.1%	1.1%	1.2%	1.2%	1.2%	1.2%

Note: includes leisure and unmanaged business travel sales booked via any device, regardless of the method of payment or fulfillment

Source: eMarketer, July 2017

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eMarketer defines digital travel sales as leisure or unmanaged business travel sales—including airlines, car rentals, hotels, accommodation and transportation—booked via any device.

Developing digital travel markets will post the biggest sales gains. In Asia-Pacific and the Middle East and Africa, for example, the growth rate will remain in double digits through the end of the forecast period. Growth will be steady but significantly slower in both North America and Western Europe, a reflection of the maturity of those markets.

Overall, eMarketer estimates worldwide digital travel sales will total \$855.07 billion by the end of 2021.

Behind the Numbers

eMarketer's forecasts and estimates are based on an analysis of quantitative and qualitative data from research firms, government agencies, media firms and public companies, plus interviews with top executives at publishers, ad buyers and agencies. Data is weighted based on methodology and soundness. Each eMarketer forecast fits within the larger matrix of all its forecasts, with the same assumptions and general framework used to project figures in a wide variety of areas. Regular re-evaluation of available data means the forecasts reflect the latest business developments, technology trends and economic changes.

ASIA-PACIFIC

In 2017, Asia-Pacific will claim the title of the world's largest market for digital travel sales—a position which has been held by North America. eMarketer estimates digital travel sales in the region will reach \$214.07 billion this year, equating to 34.9% of worldwide sales. Growth will remain in double digits through the end of 2021, when digital travel sales in Asia-Pacific will total \$366.64 billion.

Digital Travel Sales in Asia-Pacific, by Country, 2016-2021

	2016	2017	2018	2019	2020	2021
Digital travel sales (billions)						
China*	\$88.36	\$113.11	\$137.99	\$161.45	\$184.05	\$211.66
Japan	\$27.96	\$29.41	\$30.79	\$32.02	\$34.26	\$35.36
India	\$16.93	\$22.52	\$27.93	\$32.34	\$36.06	\$39.09
South Korea	\$9.78	\$10.86	\$12.21	\$13.31	\$14.31	\$15.21
Indonesia	\$6.01	\$7.08	\$8.22	\$9.39	\$10.57	\$11.74
Australia	\$5.65	\$5.83	\$5.99	\$6.11	\$6.20	\$6.28
Other	\$20.10	\$25.26	\$30.43	\$36.04	\$41.53	\$47.30
Asia-Pacific	\$174.80	\$214.07	\$253.56	\$290.66	\$326.98	\$366.64
Digital travel sales growth (% change)						
India	46.0%	33.0%	24.0%	15.8%	11.5%	8.4%
China*	34.5%	28.0%	22.0%	17.0%	14.0%	15.0%
Indonesia	19.5%	17.7%	16.2%	14.2%	12.5%	11.1%
South Korea	13.7%	11.0%	12.5%	9.0%	7.5%	6.3%
Japan	5.4%	5.2%	4.7%	4.0%	7.0%	3.2%
Australia	3.6%	3.3%	2.6%	2.0%	1.6%	1.3%
Other	28.4%	25.7%	20.5%	18.5%	15.2%	13.9%
Asia-Pacific	26.2%	22.5%	18.4%	14.6%	12.5%	12.1%
Digital travel sales share (% of worldwide digital travel sales)						
China*	16.1%	18.5%	20.4%	21.9%	23.2%	24.8%
Japan	5.1%	4.8%	4.6%	4.3%	4.3%	4.1%
India	3.1%	3.7%	4.1%	4.4%	4.5%	4.6%
South Korea	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%
Indonesia	1.1%	1.2%	1.2%	1.3%	1.3%	1.4%
Australia	1.0%	1.0%	0.9%	0.8%	0.8%	0.7%
Other	3.7%	4.1%	4.5%	4.9%	5.2%	5.5%
Asia-Pacific	31.9%	34.9%	37.5%	39.5%	41.1%	42.9%

Note: includes leisure and unmanaged business travel sales booked via any device, regardless of the method of payment or fulfillment; numbers may not add up to total due to rounding; *excludes Hong Kong
Source: eMarketer, July 2017

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China will again be the regional leader in digital travel thanks to its massive population, rising levels of disposable income and widespread mobile adoption. eMarketer expects digital travel sales in the country will grow by 28.0% in 2017 to \$113.11 billion. In all, China will account for 18.5% of the worldwide digital travel market, second only to the US (30.9%).

- Mobile already makes up a large share of China's digital travel sales and will be the main driver of future sales growth. According to the China Tourism Academy and Ctrip, 64% of digital travel bookings made on Ctrip's platform during last year's Golden Week in China took place via mobile devices, compared with 36% for computers. (Golden Week occurs every year beginning October 1 and is one of China's biggest travel periods. During that week in 2016, 589 million people traveled either domestically or internationally, according to the China Tourism Academy).

- China's digital travel market will also benefit from increased investment from sharing economy services within both the transportation and lodging sectors. In an effort to grow its business there, Airbnb recently rebranded its China site to "Aibiyong," which translates to "welcome each other with love." The home-sharing platform has also announced plans to launch its peer-to-peer led tour and activities product, Airbnb Trips, in Shanghai.

In India, the travel industry is beginning to feel the impact of last year's demonetization, which took the country's highest-value banknotes out of circulation. The lack of cash is driving down offline travel sales, particularly of larger overseas trips. On the flip side, the use of online travel services is growing steadily and digital travel sales are soaring. eMarketer estimates India will be the fastest-growing digital travel market worldwide this year. Sales will climb by 33.0% to \$22.52 billion—a figure that will nearly double by the end of 2021.

- Much of the growth in India's digital travel sales comes from nonmetropolitan Tier 2 and Tier 3 cities, as consumers there adopt more digital transactions as a result of the demonetization.
- Most of the dominant digital travel platforms in India, including MakeMyTrip.com and Yatra.com, are domestic. Like their customers, those platforms tend to be mobile-first.

Indonesia's weak economy will continue to hold back digital travel sales in the country this year. Nevertheless, ongoing infrastructure developments in public transportation, toll roads and improved airport facilities are likely to attract more visitors, and this will help drive growth in the country's digital travel market. eMarketer estimates digital travel sales in Indonesia will reach \$7.08 billion in 2017, representing a 17.7% increase from last year.

Japan is one of the most established digital travel markets in Asia-Pacific. eMarketer expects digital travel sales will rise by just 5.2% to \$29.41 billion in 2017. The growth rate will jump to 7.0% in 2020 due to the Summer Olympics in Tokyo, and sales will reach \$34.26 billion that year.

eMarketer has raised its estimates for digital travel sales in South Korea, ahead of the 2018 Winter Olympics in Pyeongchang. Much of the infrastructure is already in place, and digital travel sales will rise by 11.0% to reach \$10.86 billion this year. In 2018, the growth rate will climb

to 12.5% before slowing back down to 6.3% in 2021, when digital travel sales will total \$15.21 billion.

Australia has a small but well-developed digital travel market. Sales on online travel platforms continue to rise at the expense of offline travel services, with airlines' own websites and apps registering the most growth. eMarketer expects digital travel sales in Australia will grow by 3.3% in 2017 to reach \$5.83 billion.

CENTRAL AND EASTERN EUROPE

With just \$6.72 billion in sales in 2017, Central and Eastern Europe is the smallest regional digital travel market in eMarketer's forecast. Russia will make up more than one-third (35.9%) of sales in the region.

Digital Travel Sales in Central & Eastern Europe, by Country, 2016-2021

	2016	2017	2018	2019	2020	2021
Digital travel sales (billions)						
Russia	\$2.20	\$2.41	\$2.79	\$3.03	\$3.26	\$3.47
Other	\$3.91	\$4.31	\$5.00	\$5.56	\$6.03	\$6.41
Central & Eastern Europe	\$6.11	\$6.72	\$7.80	\$8.59	\$9.29	\$9.87
Digital travel sales growth (% change)						
Russia	9.3%	9.6%	16.0%	8.5%	7.5%	6.3%
Other	9.5%	10.2%	16.0%	11.1%	8.4%	6.3%
Central & Eastern Europe	9.4%	10.0%	16.0%	10.2%	8.1%	6.3%
Digital travel sales share (% of worldwide digital travel sales)						
Russia	0.4%	0.4%	0.4%	0.4%	0.4%	0.4%
Other	0.7%	0.7%	0.7%	0.8%	0.8%	0.7%
Central & Eastern Europe	1.1%	1.1%	1.2%	1.2%	1.2%	1.2%

Note: includes leisure and unmanaged business travel sales booked via any device, regardless of the method of payment or fulfillment; numbers may not add up to total due to rounding
Source: eMarketer, July 2017

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Digital travel sales growth in Central and Eastern Europe will be driven by the 2017 Confederations Cup and the 2018 FIFA World Cup, both of which will be held in Russia. In 2017, eMarketer expects digital travel sales will rise by 10.0% regionally and by 9.6% in Russia. Next year, the regional sales growth rate will mirror that of Russia, at 16.0% each.

LATIN AMERICA

Despite the region's political and economic turmoil, Latin America's digital travel market is performing well. eMarketer estimates digital travel sales in the region will rise by 16.6% in 2017 to \$24.32 billion. The growth rate will remain in double digits through 2020 before dipping to 9.0% in 2021.

Digital Travel Sales in Latin America, by Country, 2016-2021

	2016	2017	2018	2019	2020	2021
Digital travel sales (billions)						
Brazil	\$9.43	\$10.37	\$11.31	\$12.27	\$13.25	\$14.26
Mexico	\$3.99	\$4.65	\$5.37	\$6.16	\$6.93	\$7.63
Argentina	\$1.73	\$2.27	\$2.74	\$3.20	\$3.63	\$4.00
Other	\$5.71	\$7.02	\$8.03	\$9.10	\$10.16	\$11.15
Latin America	\$20.86	\$24.32	\$27.45	\$30.73	\$33.98	\$37.04
Digital travel sales growth (% change)						
Argentina	47.8%	31.0%	20.5%	17.0%	13.5%	10.2%
Mexico	18.0%	16.5%	15.5%	14.7%	12.5%	10.0%
Brazil	16.5%	10.0%	9.0%	8.5%	8.0%	7.6%
Other	25.5%	23.1%	14.4%	13.2%	11.7%	9.7%
Latin America	21.3%	16.6%	12.9%	11.9%	10.6%	9.0%
Digital travel sales share (% of worldwide digital travel sales)						
Brazil	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%
Mexico	0.7%	0.8%	0.8%	0.8%	0.9%	0.9%
Argentina	0.3%	0.4%	0.4%	0.4%	0.5%	0.5%
Other	1.0%	1.1%	1.2%	1.2%	1.3%	1.3%
Latin America	3.8%	4.0%	4.1%	4.2%	4.3%	4.3%

Note: includes leisure and unmanaged business travel sales booked via any device, regardless of the method of payment or fulfillment; numbers may not add up to total due to rounding
Source: eMarketer, July 2017

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Argentina is again expected to make the strongest digital travel sales gains in Latin America this year, though this may be partly due to the country's high inflation rate. In January 2017, the new government lifted the last of the major currency controls established by the Kirchner regime, and the country is now primed for a boom in ecommerce—and consequently digital travel. eMarketer estimates Argentina's digital travel sales will grow by 31.0% this year to \$2.27 billion.

- The currency controls implemented in 2011 limited access to the foreign cash consumers needed to travel, holding back travel sales in the country. Restrictions on the use of domestic payment cards abroad and on cross-border ecommerce sites further hindered travel sales, particularly digital.

- The recent arrival of low-cost airlines to Argentina will help boost digital travel sales. As of May 2017, Ireland-based Ryanair has been selling flights from Europe to Argentina as part of a partnership with Spain's Air Europa airline. The government has also authorized local budget airline Flybondi to start operating domestic and international flights, while Norwegian Air is waiting for approval to do the same.

Brazil is home to the largest digital travel market in Latin America. eMarketer estimates digital travel sales in the country will total \$10.37 billion in 2017, accounting for 42.6% of sales in the region.

- According to comScore, travel sites reached more than one-third (34.6%) of desktop internet users in Brazil in 2016. As internet access expands in Brazil, so too will the number of digital travel bookers, leading to an increase in digital travel sales.
- As is to be expected for a popular tourist destination like Brazil, digital travel sales in the country are outpacing retail ecommerce sales. In 2017, travel sales booked via digital devices will grow by 10.0%, eMarketer estimates, compared with 9.5% for digital purchases of goods and services (except travel and event tickets).
- Despite overall digital travel sales growth, sales of airline tickets in Brazil are down. Due to the uncertain economy, consumers are opting to take less expensive and shorter trips by car.

Mexico's digital travel market is continuing to grow at a steady pace, as consumers become increasingly comfortable booking transport and lodging online. eMarketer estimates digital travel sales in the country will rise by 16.5% in 2017 to reach \$4.65 billion. The growth rate is expected to remain in double digits through the end of the forecast period.

- Online purchases of airline tickets, both directly from an airline or through a travel agency, are a major driver of digital travel sales growth in Mexico. Last year's agreement between the US and Mexico allowing for increased air travel between the two countries will likely continue to boost digital airline sales in Mexico.

- Travel is already one of the leading categories bought online in Mexico, and an increasing number of travel bookings are taking place via mobile. According to AMIPCI (Asociación Mexicana de Internet) and comScore, 25% of mobile device users in the country booked a flight via a smartphone or tablet in 2016, up from 21% in 2015. The share of mobile accommodations bookers rose from 23% to 27% during the same time period.

NORTH AMERICA

In 2017, North America will no longer be the world's largest digital travel market—that title will go to Asia-Pacific. eMarketer estimates digital travel sales in North America will reach \$200.05 billion this year, representing 32.6% of worldwide sales.

Digital Travel Sales in North America, by Country, 2016-2021

	2016	2017	2018	2019	2020	2021
Digital travel sales (billions)						
US*	\$180.59	\$189.62	\$198.15	\$206.08	\$213.29	\$219.69
Canada	\$9.81	\$10.43	\$11.05	\$11.65	\$12.24	\$12.80
North America	\$190.40	\$200.05	\$209.20	\$217.73	\$225.53	\$232.49
Digital travel sales growth (% change)						
Canada	6.7%	6.3%	5.9%	5.5%	5.0%	4.6%
US*	7.5%	5.0%	4.5%	4.0%	3.5%	3.0%
North America	7.5%	5.1%	4.6%	4.1%	3.6%	3.1%
Digital travel sales share (% of worldwide digital travel sales)						
US*	32.9%	30.9%	29.3%	28.0%	26.8%	25.7%
Canada	1.8%	1.7%	1.6%	1.6%	1.5%	1.5%
North America	34.7%	32.6%	30.9%	29.6%	28.4%	27.2%

Note: includes leisure and unmanaged business travel sales booked via any device, regardless of the method of payment or fulfillment; numbers may not add up to total due to rounding; *forecast from June 2017
Source: eMarketer, July 2017

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On a country-by-country basis, however, the US will still account for the largest share (30.9%) of the global digital travel market. Canada's share of the total will reach 1.7%, or \$10.43 billion, this year.

Domestic travel will be a major driver of digital travel sales growth in Canada in 2017, as the country celebrates its 150th anniversary. A May 2017 poll by Ipsos for RBC Insurance found that 60% of the country's internet users who planned to travel this year would do so within Canada.

The weak Canadian dollar is also encouraging travelers in Canada to stay closer to home. Therefore, it's hardly a

surprise that car rental sales are rising and will contribute to this year's 6.3% growth in the country's digital travel market.

WESTERN EUROPE

Like North America, Western Europe has a well-developed digital travel market. eMarketer estimates digital travel sales in the region will rise by 5.7% to \$141.68 billion in 2017. Sales will continue to grow at a slow but steady pace through 2021, when the digital travel market will be worth \$161.61 billion.

Digital Travel Sales in Western Europe, by Country, 2016-2021

	2016	2017	2018	2019	2020	2021
Digital travel sales (billions)						
UK*	\$33.05	\$35.42	\$37.61	\$39.65	\$41.43	\$42.88
Germany	\$26.33	\$27.44	\$28.07	\$28.52	\$28.83	\$29.06
France	\$19.60	\$20.41	\$21.11	\$21.70	\$22.14	\$22.38
Spain	\$9.05	\$9.86	\$10.50	\$11.03	\$11.52	\$12.01
Italy	\$7.73	\$8.19	\$8.52	\$8.77	\$8.99	\$9.19
Netherlands	\$5.31	\$5.58	\$5.83	\$6.06	\$6.28	\$6.49
Norway	\$4.36	\$4.50	\$4.62	\$4.73	\$4.82	\$4.90
Sweden	\$4.28	\$4.44	\$4.60	\$4.75	\$4.89	\$5.01
Denmark	\$3.43	\$3.59	\$3.70	\$3.78	\$3.84	\$3.86
Finland	\$3.18	\$3.27	\$3.35	\$3.43	\$3.49	\$3.55
Other	\$17.69	\$18.99	\$20.13	\$21.02	\$21.81	\$22.30

Western Europe \$133.99 \$141.68 \$148.05 \$153.44 \$158.04 \$161.61

Digital travel sales growth (% change)

Spain	10.4%	9.0%	6.5%	5.0%	4.5%	4.2%
UK*	9.7%	7.2%	6.2%	5.4%	4.5%	3.5%
Italy	8.4%	6.0%	4.0%	3.0%	2.5%	2.2%
Netherlands	6.5%	5.0%	4.5%	4.0%	3.6%	3.3%
Denmark	5.5%	4.7%	3.1%	2.2%	1.5%	0.5%
Germany	6.4%	4.2%	2.3%	1.6%	1.1%	0.8%
France	3.6%	4.1%	3.5%	2.8%	2.0%	1.1%
Sweden	4.5%	3.8%	3.5%	3.3%	2.9%	2.5%
Norway	4.2%	3.2%	2.8%	2.3%	1.9%	1.6%
Finland	3.2%	2.8%	2.5%	2.0%	1.9%	1.5%
Other	7.9%	7.3%	6.1%	4.4%	3.7%	2.3%

Western Europe 7.1% 5.7% 4.5% 3.6% 3.0% 2.3%

Note: includes leisure and unmanaged business travel sales booked via any device, regardless of the method of payment or fulfillment; numbers may not add up to total due to rounding; *forecast from June 2017

Source: eMarketer, July 2017

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The UK is Western Europe's largest digital travel market, with \$35.42 billion in sales this year, eMarketer estimates. Sales will continue to rise throughout the forecast period, though at a declining rate.

- The weak British pound following Brexit has helped increase the number of international tourists to the UK by making it cheaper for them to travel there. The Office for National Statistics (ONS) – UK reported that the number of overseas visitors to the UK rose by 11% from February to April 2017 compared with the same period in 2016.
- While the recent string of terror attacks has caused some concern in the UK travel industry, it has not appreciably deterred travelers. According to a May 2017 forecast from Euromonitor, the number of visitors to the UK will rise by 4.9% in 2017. Still, this a slight downgrade from its earlier projection of 5.1%.

Germany's digital travel market will continue to benefit from the country's strong economy and high levels of consumer confidence, which will encourage consumers in the country to spend their money on travel. eMarketer estimates digital travel sales in the country will reach \$27.44 billion in 2017, up 4.2% from last year.

The growing popularity of online travel agencies (OTAs) will contribute to digital travel sales growth in France. This year, digital travel sales in the country will increase by 4.1% to \$20.41 billion. By the end of 2021, that figure will rise to \$22.38 billion.

With \$4.50 billion in sales this year, Norway will be the largest digital travel market in the Nordic region, which also includes Denmark, Finland and Sweden. Digital travel sales in the Nordic countries combined will reach \$15.80 billion in 2017 and grow to \$17.31 billion in 2021.

- Sharing economy services, particularly Airbnb, will be a driving force behind digital travel sales growth in the Nordic countries. As in other Western European countries, however, there have been challenges to sharing economy adoption in the Nordics. Most recently, Uber suspended its unlicensed UberPOP service in Finland until next year, when a new law deregulating the taxi market is expected to take effect.

As one of the leading travel destinations in Western Europe, Spain will be the region's fastest-growing digital travel market this year. eMarketer estimates digital travel sales in the country will rise by 9.0% to reach \$9.86 billion.

- The improving economy is helping spur domestic tourism in Spain, while political uncertainty and threats of terrorism in nearby countries on the Mediterranean, particularly Egypt, Turkey and Tunisia, are pushing more international tourists to visit Spain instead. These factors will contribute to continued growth in Spain's digital travel market through the end of the forecast period.

Italy has lagged behind other Western European markets in terms of digital travel due in part to slow consumer adoption of digital devices. As smartphones continue to proliferate and travel service providers direct their focus to mobile platforms, however, digital travel sales in the country will rise. eMarketer estimates digital travel sales in Italy will grow by 6.0% this year to reach \$8.19 billion.

As the home of one of the world's most popular digital travel suppliers, Booking.com, the Netherlands plays an important role in the global digital travel market. eMarketer estimates digital travel sales in the country will reach \$5.58 billion in 2017, up 5.0% from last year.

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