The Omio European Mobility Report

An insight into traveller habits through the COVID-19 pandemic, from 2019 to 2021.

Q1 2022

In this report

NB: all trend sections highlight overall global trends. Each section also includes a breakdown either by country for France, Germany, Italy, Spain and the UK, by transport mode, or by year. If you would like to take a look at our data in more depth, please get in touch.

About this report

As we become accustomed to a new normal following the outbreak of the global pandemic in 2020, we wanted to take a look at back our data in order to assess the role of travel in an altered world and to see how travel habits have shifted.

Omio is in a unique position to do so, as we sell tickets for trains, buses, flights and ferries in 37 different countries. We believe that, for travel to fully rebound in a responsible way that is empowering for travellers, we need be open and transparent with our data.

“At Omio we love to explore data and see the world behind it. We believe that the many journeys taken by travellers around the globe make for the best stories,” Jörg Engelbergs, Vice President of Controlling, Data Science & Insights.

This report looks at Omio’s booking data from 01/01/2019 to 31/12/2022 at a global level, and with country or mode specific deep-dives.

NB: while the report focuses on data from the start of 2019 to the end of 2021, we want to acknowledge the invasion of Ukraine by the Russian government in March 2022, something we as an organisation condemn. While we anticipated a decrease in travel, we actually saw the opposite happen. People are continuing to travel more and more and we are seeing a weekly uptick in the number of bookings made on the platform.

About the data collection: as this report is concerned with travellers’ behaviours, we have aggregated data from all individual bookings made during the specified timeframe. All of our takeaways are based on these total data amounts, and we have shared the quarter-on-quarter percentage changes (Omio does not share total numbers). Different metrics, such as a monetary volume, distance travelled etc, have been used for different trend sections, and this is noted. Data shown in the report here focuses on quarter on quarter % increases (each quarter is compared with the prior quarter) from Jan 2019 to Dec 2021. The featured date indicates when the data was pulled, and refers to the trailing quarter).

A note from our CEO

Travel is a powerful connector of people, and we believe that it is more important than ever before to bridge different cultures through travel.

At Omio, we are working hard to help enable this cross-cultural connection through simplifying the experience of booking personalised journeys. We aim to allow travelers to book very complex multi-modal trips effortlessly and in one place, taking away misunderstandings of timetables, ticket types and purchasing options, and thus empowering travelers to simply search, compare and book travel digitally that will take them from where they are to where they want to be.

While the world, to a degree, remains - and will continue to be - an uncertain place, we deeply believe that in 2022 travel will bounce back stronger than before the pandemic. We believe that to create true change in the industry, the whole sector needs to adapt. We hope that in sharing our insights, we can help others build better transport experiences.

— **Naren Shaam,** CEO and Founder, Omio Group

Tracked and transparent:

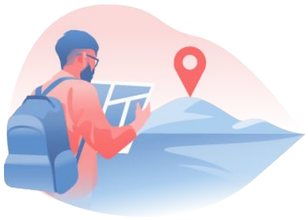
Travel trends

An in depth look at Omio's European data from 01/2019-12/2021

Eight travel trends observed by Omio

1 Travel is increasingly resistant to COVID-19

Travel is recovering strongly; from the significant impact of the first COVID-19 wave in 2020, **the later waves have had less and less impact on travel,** with more and more people taking trips.



2 People are travelling shorter distances

Long distance (800+ km) travel is down 25% to pre-COVID-19, while **mid/long distance travel (400-800 km) is a tenth lower.**

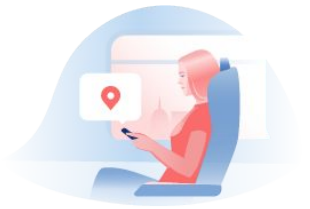
3 Short-haul flights are being avoided

We saw a **significant decline in short-haul flights** (of less than 400 km) between 2019 to 2021.

4 Different types of transport were affected differently

Train travel significantly gained traveller shares during the COVID- variant waves while **flight and bus shares dropped significantly.**

Eight travel trends observed by Omio



5 Travellers are exploring their home country

There was a **significantly lower share of international travel** in 2020 and 2021 and a correlating increase in domestic travel.

6 Travel bookings are increasingly made last minute

With uncertainty during the pandemic, Omio has seen **last-minute bookings nearly double,** with over 20% of trips being booked on the same day that travel is happening. **In 2021, the number peaked at around 25%**, whereas in 2019, the number was closer to 10%.

7 Travel to top destinations was most impacted

We saw a **gradual shift from the most popular routes to more long-tail ones**. A small shift back has already occurred as the impact of Covid on travel eases.

8 People travelled alone more through COVID-19 waves

Travelling together was often not an option during the pandemic but we see a **resurgence in group trips.** At the end of 2021 people were travelling together about as much as alone, **but summer 2019 saw a higher ratio of 2:1.**

Industry growth:

Is travel a priority?

Travel and tourism are important for people

1

When markets reopen, people re-start travelling.

The steep drop-off in travel bookings at the start of 2020 was temporary. We now see a significant increase in travel bookings, comparable to 2019 levels; data shows that, as soon as markets reopened, there was an immediate uptick in travel bookings.

2

Regulations changed travel behaviours, rather than stopping it.

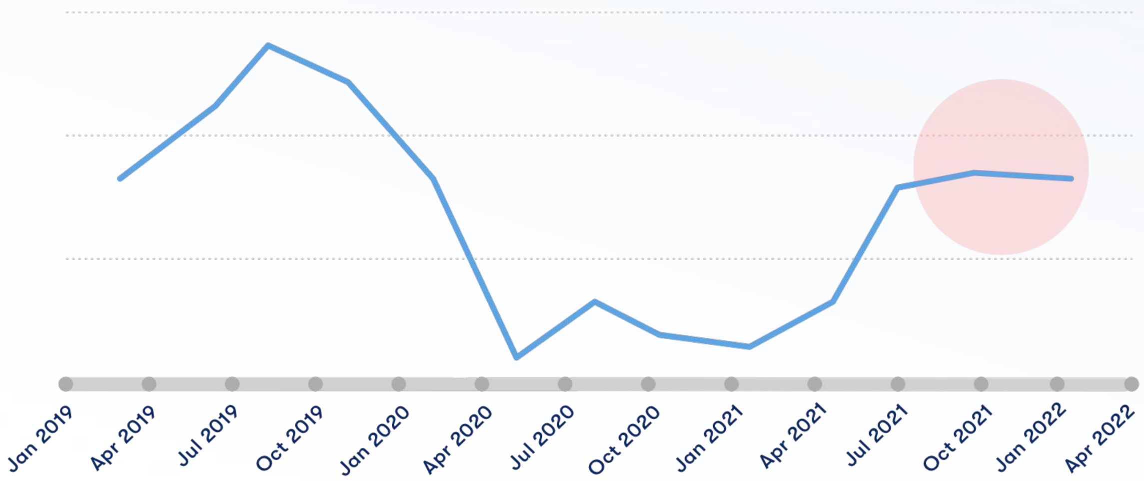
COVID-19 regulations forced people to adapt their travel habits rather than preventing them from travelling. Cross-border travel was determined by government regulations and local policies, and when uncertainty prevailed, people preferred to explore local destinations.

3

Germans and Italians were more cautious about travel than other EU countries.

Country-specific data shows that those from the UK, Italy and Spain were travelling much more in 2021 than in 2020, while the corresponding data from Germany and Italy suggests a little more caution with travel growing more slowly in 2021.

Industry growth: Global booking data

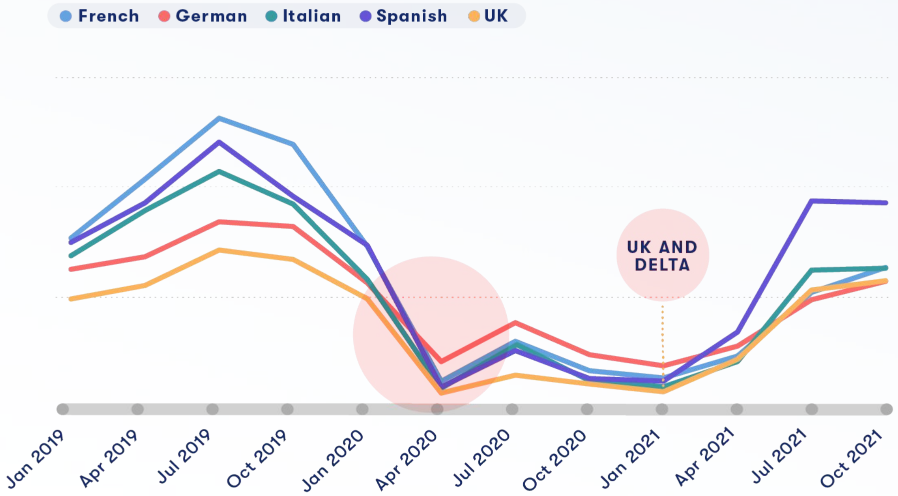


Key takeaway
Travel remains a priority to many. There is a strong correlation between borders reopening and an increase in tickets purchased.

QUARTER	QoQ % CHANGE
January 2019	Baseline
April 2019	25%
July 2019	27%
October 2019	-11%
January 2020	-32%
April 2020	-87%
July 2020	190%
October 2020	-48%
January 2021	-27%
April 2021	146%
July 2021	163%
October 2021	11%
January 2022	-3%
April 2022	-7%

Data shown here is quarter on quarter % increase data (based on total € amount) from Jan 2019 to Dec 2021. It looks at all of Omio's bookings.

Industry growth: Country specific booking data

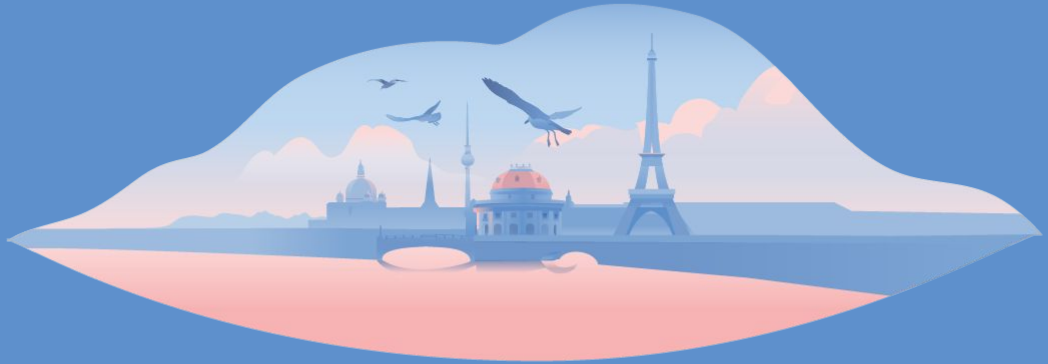


Key takeaway
Travellers in France, Germany, Italy, Spain and the UK reacted fairly similarly to the COVID-variant waves. Italy, who were arguably hit the hardest by the first wave, bounced back the strongest after that wave. While the Delta variant arguable impacted the UK more, and we see a stronger bounceback in the UK following this variant.

QUARTER	FRANCE QoQ %	GERMANY QoQ %	ITALY QoQ %	SPAIN QoQ %	UK QoQ %
January 2019	Baseline				
April 2019	36%	10%	31%	25%	13%
July 2019	27%	24%	21%	31%	31%
October 2019	-9%	-3%	-14%	-21%	-6%
January 2020	-40%	-32%	-38%	-24%	-28%
April 2020	-87%	-67%	-90%	-91%	-92%
July 2020	205%	99%	322%	266%	228%
October 2020	-49%	-41%	-62%	-56%	-34%
January 2021	-24%	-24%	-31%	-11%	-46%
April 2021	96%	56%	180%	249%	361%
July 2021	142%	85%	233%	191%	167%
October 2021	23%	18%	1%	-1%	8%

Long-distance travel:

What journeys are being prioritised?



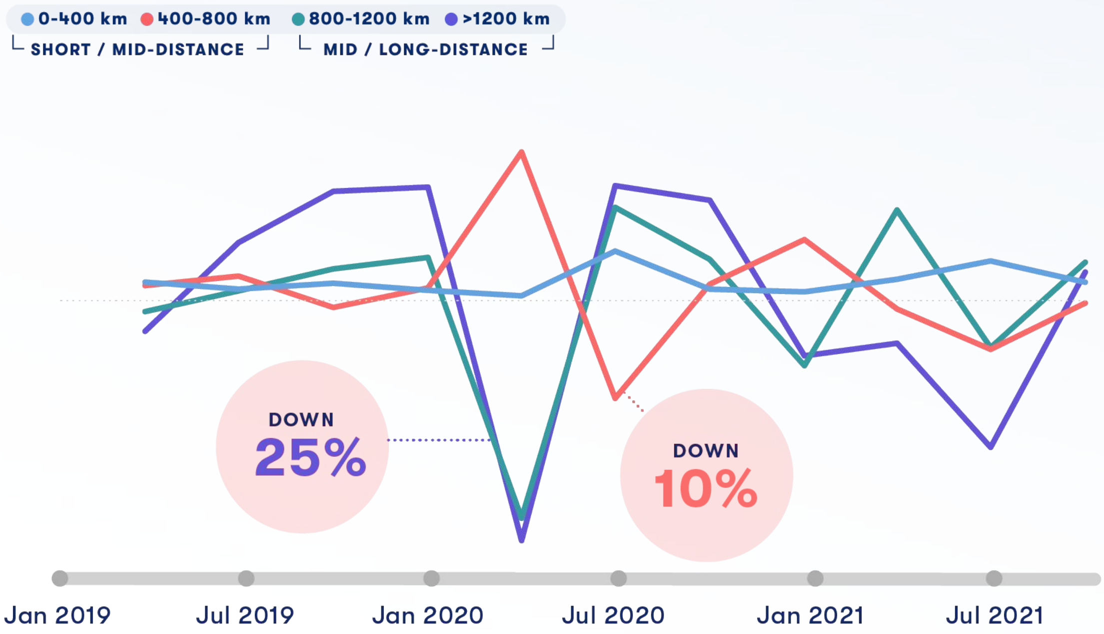
Long-distance ground-travel decreased, while long-distance flights increased

1. **No one wants to take short-haul flights during a pandemic.**
   Short haul flights became less popular, with people opting for alternative transportation options such as train and bus travel.

2. **Shorter distances were covered by travellers on trains and buses.**
   Long-distance bus and train travel saw a significant decrease in bookings, suggesting travellers wanted to minimise time in transit.

3. **Long-haul flights increased during COVID-19 waves.**
   The percentage of long-haul flights taken increased, implying people were taking more significant journeys.

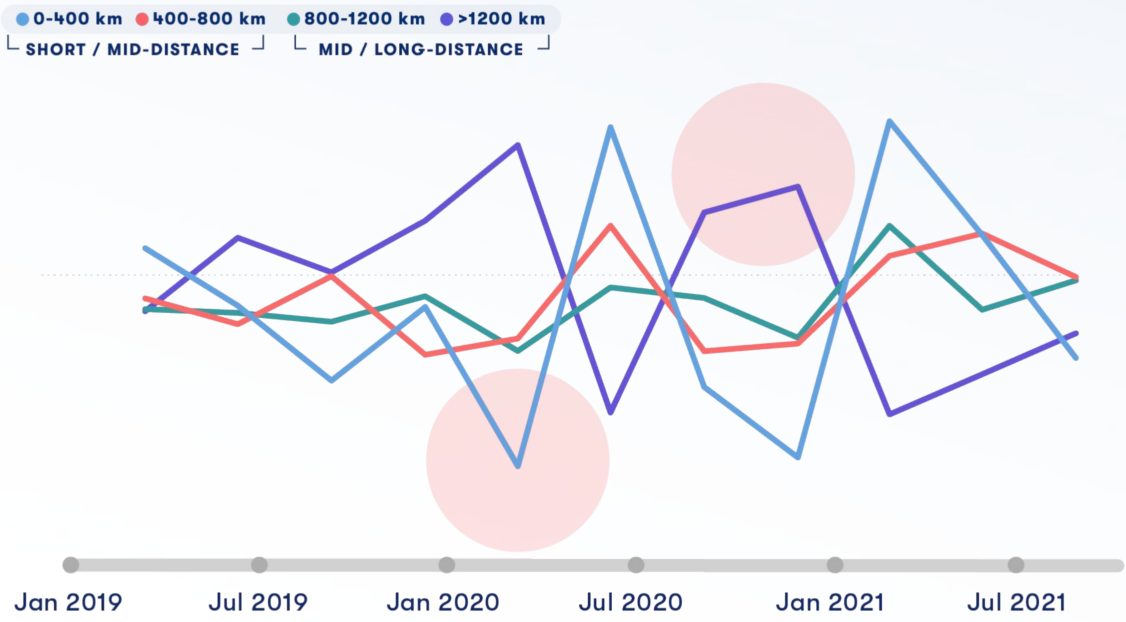
Long-distance travel: Global data all modes



Key takeaway
Long distance (800+ km) travel is 25% down to pre-Covid; mid/long distance travel (400-800 km) share is also a tenth lower.

QUARTER	>1200 km	800-1200 km	400-800 km	0-400 km
January 2019	Baseline			
April 2019	-8%	-5%	0%	1%
July 2019	8%	-1%	2%	-1%
October 2019	17%	3%	-4%	0%
January 2020	18%	5%	0%	-1%
April 2020	-47%	-42%	24%	-2%
July 2020	18%	14%	-21%	6%
October 2020	16%	5%	0%	-1%
January 2021	-13%	-15%	8%	-1%
April 2021	-11%	14%	-4%	1%
July 2021	-30%	-11%	-12%	4%
October 2021	2%	4%	-3%	1%

Long-distance travel: Global flight data

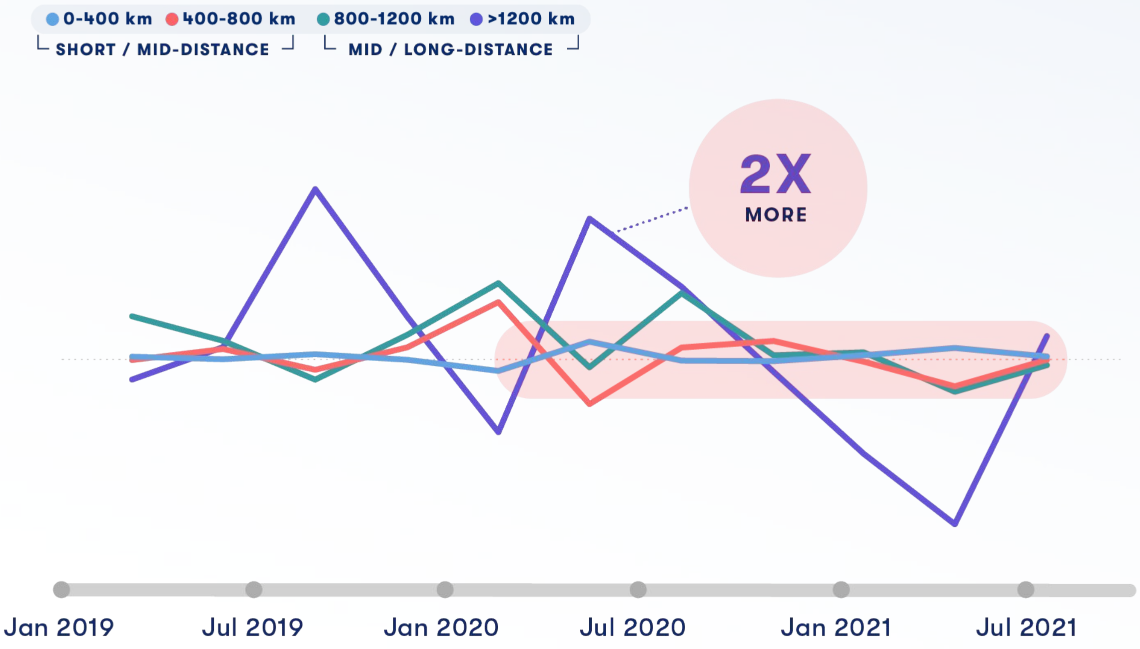


Key takeaway
Short distance flights are being avoided, while long haul flights picked up, especially during COVID-19 waves and increased restrictions.

QUARTER	>1200 km	800-1200 km	400-800 km	0-400 km
January 2019	Baseline			
April 2019	9%	-2%	-4%	-1%
July 2019	4%	-3%	4%	-12%
October 2019	12%	1%	-8%	-1%
January 2020	23%	-8%	-6%	-25%
April 2020	-17%	2%	11%	26%
July 2020	13%	0%	-8%	-13%
October 2020	17%	-6%	-6%	-23%
January 2021	-17%	11%	7%	27%
April 2021	-11%	-1%	10%	10%
July 2021	-5%	3%	3%	-9%
October 2021	-2%	-1%	0%	8%

 | Data shown here is quarter on quarter % increase data (based on total km per journey) from Jan 2019 to Dec 2021.

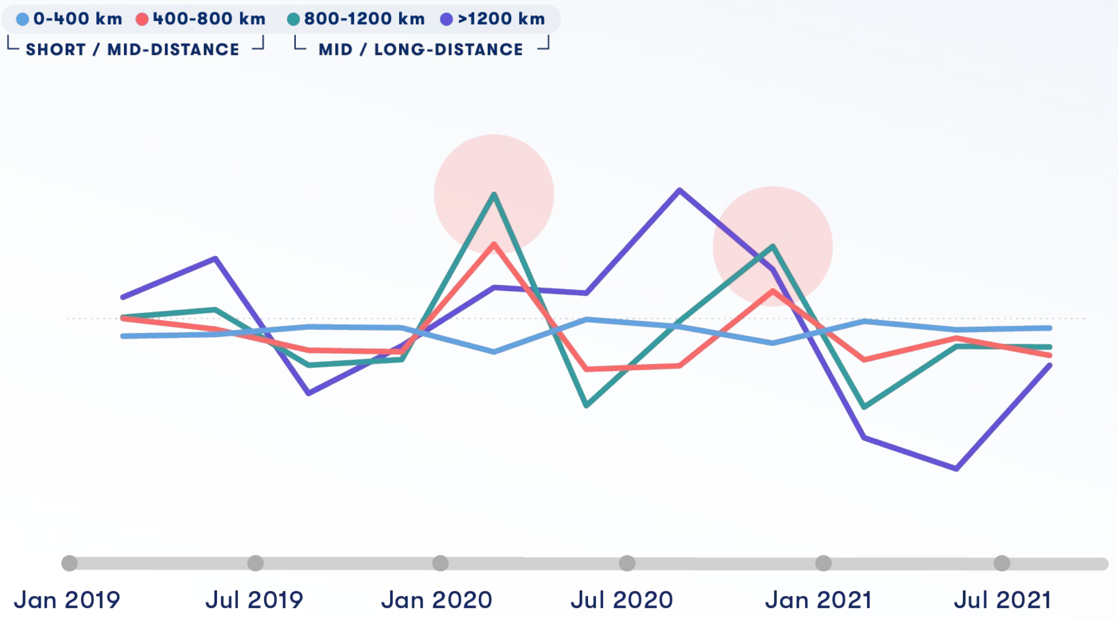
Long-distance travel: Global train data



Key takeaway
The number of passengers taking mid-/long-distance train journeys has doubled, while shorter distance journeys have remained relatively stable.

QUARTER	>1200 km	800-1200 km	400-800 km	0-400 km
January 2019	Baseline			
April 2019	-11%	21%	-1%	1%
July 2019	5%	8%	4%	-1%
October 2019	84%	-11%	-6%	1%
January 2020	20%	11%	5%	-1%
April 2020	-38%	37%	28%	-7%
July 2020	70%	-5%	-24%	8%
October 2020	35%	32%	5%	-2%
January 2021	-7%	1%	8%	-2%
April 2021	-50%	2%	-2%	1%
July 2021	-84%	-17%	-15%	5%
October 2021	11%	-4%	-1%	0%

Long-distance travel: Global bus data



Key takeaway
Buses appear to have stood in as a temporary replacement for cross-border European flights (non-domestic short haul).

QUARTER	>1200 km	800-1200 km	400-800 km	0-400 km
January 2019	Baseline			
April 2019	18%	8%	7%	-2%
July 2019	37%	11%	2%	-1%
October 2019	-30%	-16%	-9%	3%
January 2020	-7%	-13%	-10%	2%
April 2020	22%	69%	44%	-10%
July 2020	20%	-36%	-18%	7%
October 2020	71%	6%	-17%	3%
January 2021	31%	43%	21%	-5%
April 2021	-52%	-37%	-14%	6%
July 2021	-68%	-7%	-3%	1%
October 2021	-16%	-7%	-11%	2%

 | Data shown here is quarter on quarter % increase data (based on total km per journey) from Jan 2019 to Dec 2021.

Modal shift:

Which transport modes have risen or fallen?

Flight travel suffered the most

1

Flying feels less frightening.

Flights share is gradually recovering but it is still lower to pre-COVID-19.

2

The shift to train travel through COVID-19 waves was only temporary.

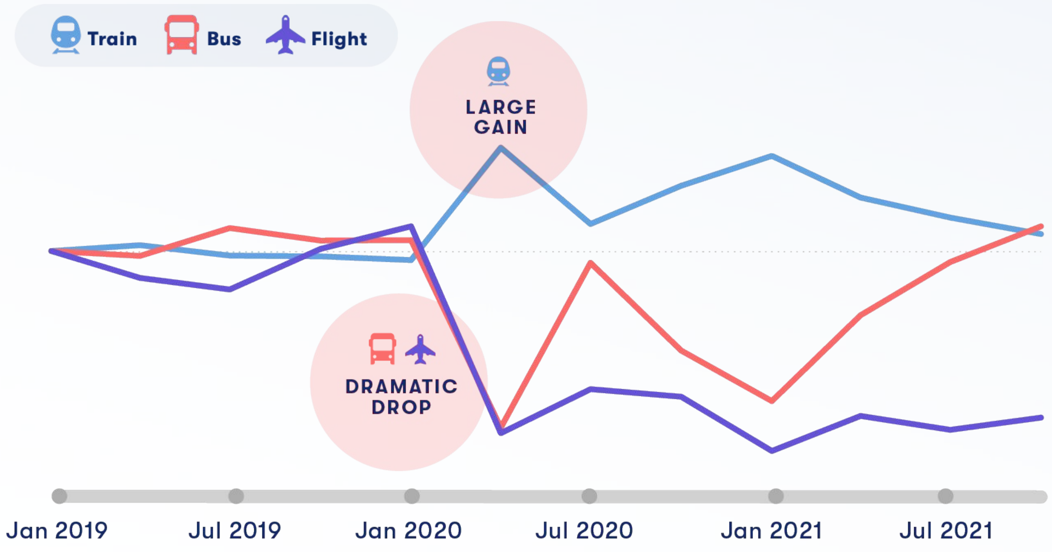
Train travel significantly gained traveller shares during the COVID-variant waves, but the shift wasn't sustained.

3

International travel is yet to fully recover.

We see less travellers coming from overseas, therefore meaning a decrease in flight travel within Europe.

Modal shift: Global booking data

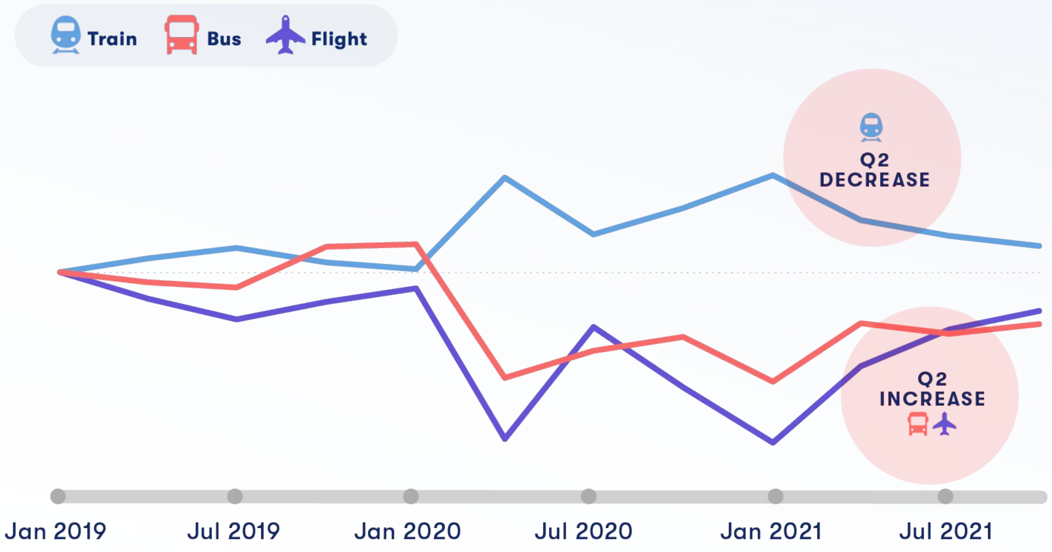


Key takeaway
— *Flight and bus* share dropped dramatically during the first European lockdown, but their usage is gradually recovering.
— *Train travel* significantly gained traveller shares during the COVID-variant waves, but now, as restrictions are eased, bus and flight are regaining shares.

QUARTER	FLIGHT QoQ %	TRAIN QoQ %	BUS QoQ %
January 2019	Baseline		
April 2019	-8%	2%	-1%
July 2019	-4%	-3%	9%
October 2019	14%	0%	-4%
January 2020	7%	-1%	0%
April 2020	-59%	35%	-55%
July 2020	30%	-18%	109%
October 2020	-4%	11%	-28%
January 2021	-30%	8%	-22%
April 2021	27%	-10%	48%
July 2021	-9%	-5%	20%
October 2021	8%	-5%	11%

 | Data shown here is quarter on quarter % increase data (based on total # of bookings) from Jan 2019 to Dec 2021. It looks at all of Omio's bookings.

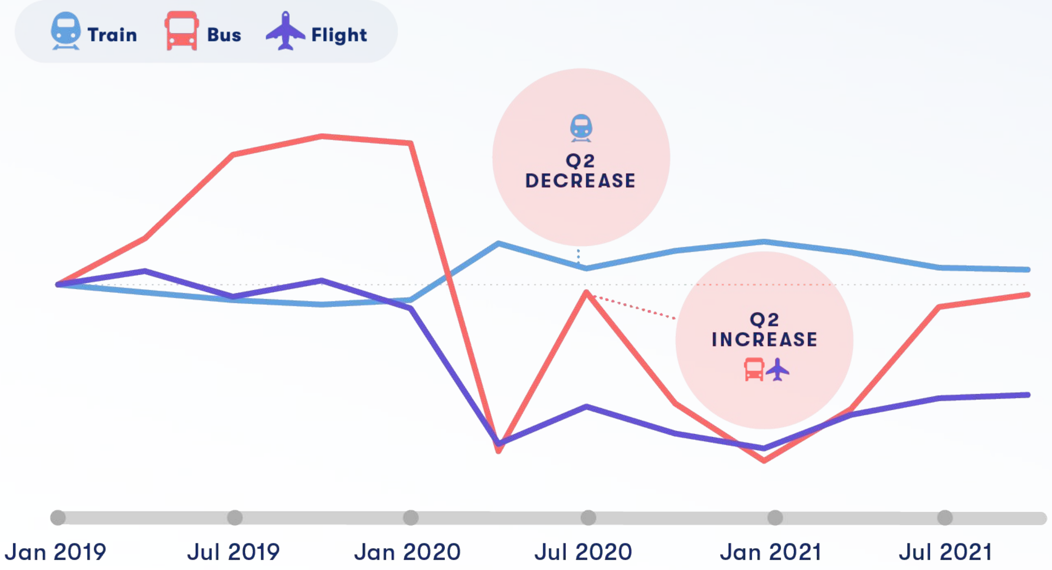
Modal shift: French booking data



Key takeaway
In Q2 2021, after the second lockdown, there was a decrease in trains taken, and steep increase in number of flight and bus journeys taken.

QUARTER	FLIGHT QoQ %	TRAIN QoQ %	BUS QoQ %
January 2019	Baseline		
April 2019	-6%	8%	-15%
July 2019	-3%	5%	-13%
October 2019	24%	-7%	13%
January 2020	1%	-3%	9%
April 2020	-64%	49%	-91%
July 2020	35%	-21%	721%
October 2020	13%	12%	-47%
January 2021	-38%	13%	-82%
April 2021	80%	-16%	647%
July 2021	-8%	-7%	42%
October 2021	8%	-5%	15%

Modal shift: German booking data



Key takeaway
Following the loosening of restrictions in Germany in Q2 2020, there was a slight but sustained decrease in the number of trains taken, but a steep increase in amount of flight and bus journeys taken.

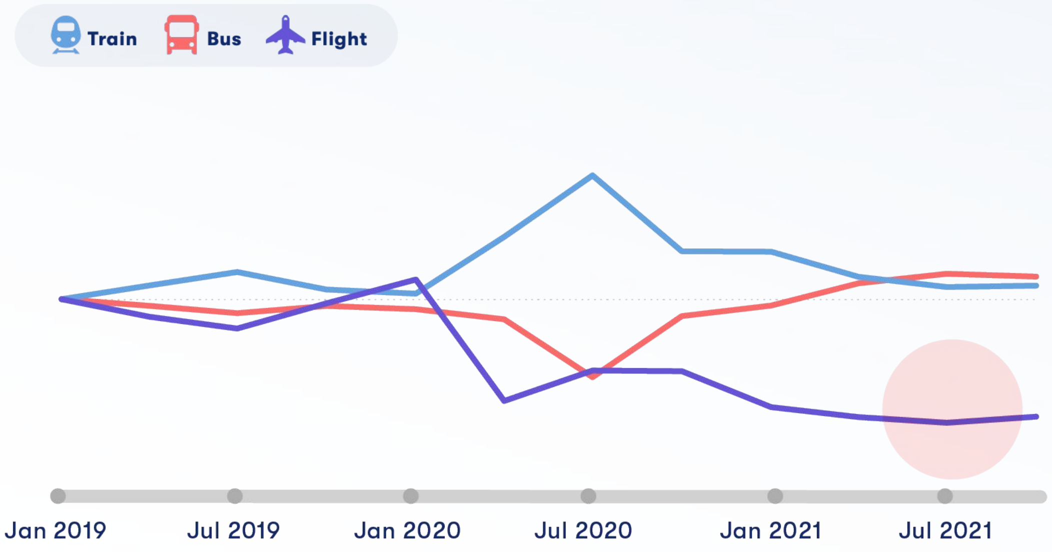
QUARTER	FLIGHT QoQ %	TRAIN QoQ %	BUS QoQ %
January 2019	Baseline		
April 2019	7%	-4%	23%
July 2019	-12%	-4%	34%
October 2019	9%	-2%	6%
January 2020	-14%	3%	-2%
April 2020	-77%	31%	-90%
July 2020	93%	-10%	487%
October 2020	-35%	8%	-58%
January 2021	-30%	4%	-71%
April 2021	95%	-4%	225%
July 2021	24%	-7%	136%
October 2021	4%	-1%	7%

Modal shift: Italian booking data

Key takeaway
In comparison to other countries, Italy had only small percentage changes in number of people travelling across mode. Train travel only ever saw a ~10% change (up or down), and flight travel only dropped by 30% in April 2020 (all other countries dropped by 55-75%).

QUARTER	FLIGHT QoQ %	TRAIN QoQ %	BUS QoQ %
January 2019	Baseline		
April 2019	-18%	2%	-5%
July 2019	3%	-6%	39%
October 2019	16%	-1%	-1%
January 2020	19%	0%	-11%
April 2020	-31%	5%	0%
July 2020	-17%	-1%	11%
October 2020	34%	1%	-17%
January 2021	-34%	2%	13%
April 2021	26%	1%	-16%
July 2021	-34%	0%	22%
October 2021	12%	-13%	75%

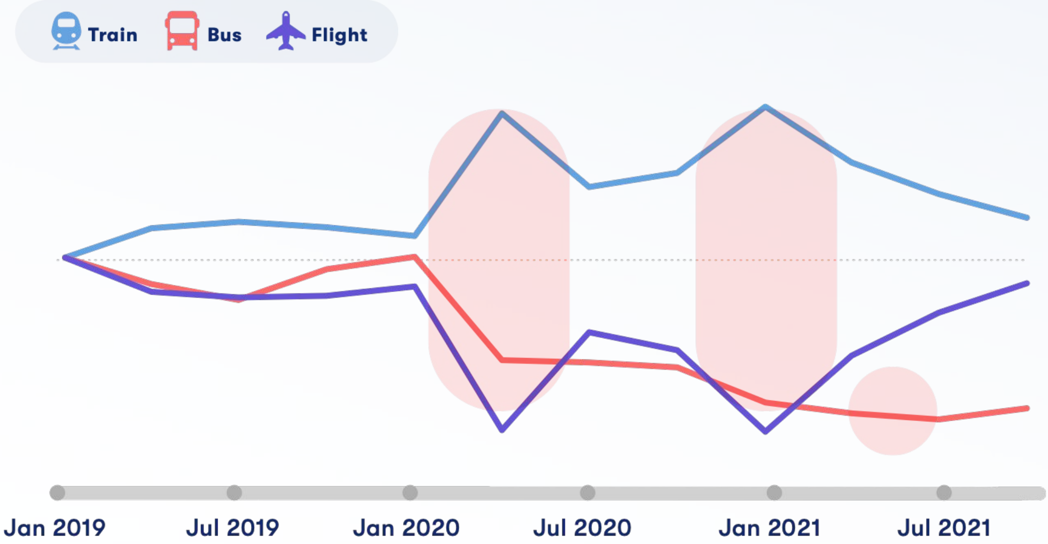
Modal shift: Spanish booking data



Key takeaway
Air and bus travel in Spain slowed completely at the onset of the pandemic, while train picked up steeply. Differently to other markets, plane travel has never really recovered.

QUARTER	FLIGHT QoQ %	TRAIN QoQ %	BUS QoQ %
January 2019	Baseline		
April 2019	-9%	-3%	7%
July 2019	-6%	-4%	6%
October 2019	14%	4%	-8%
January 2020	12%	-2%	-2%
April 2020	-54%	-5%	27%
July 2020	30%	-32%	23%
October 2020	0%	49%	-23%
January 2021	-27%	6%	0%
April 2021	-10%	11%	-10%
July 2021	-7%	4%	-5%
October 2021	8%	-1%	1%

Modal shift: United Kingdom booking data



Key takeaway
The return to travel in the UK was more unpredictable than in other markets. All decreases in flight share are matched by a corresponding increase in plane share (and vice versa). Bus share decreased significantly from 2019 levels.

QUARTER	FLIGHT QoQ %	TRAIN QoQ %	BUS QoQ %
January 2019	Baseline		
April 2019	-14%	15%	-17%
July 2019	-9%	3%	-4%
October 2019	20%	-2%	1%
January 2020	7%	-4%	6%
April 2020	-53%	57%	-86%
July 2020	-3%	-22%	430%
October 2020	-5%	5%	-15%
January 2021	-41%	24%	-79%
April 2021	-21%	-16%	359%
July 2021	-15%	-11%	44%
October 2021	33%	-9%	21%

Data shown here is quarter on quarter % increase data (based on total # of bookings) from Jan 2019 to Dec 2021.

Cross-border travel:

Have *staycations* increased?

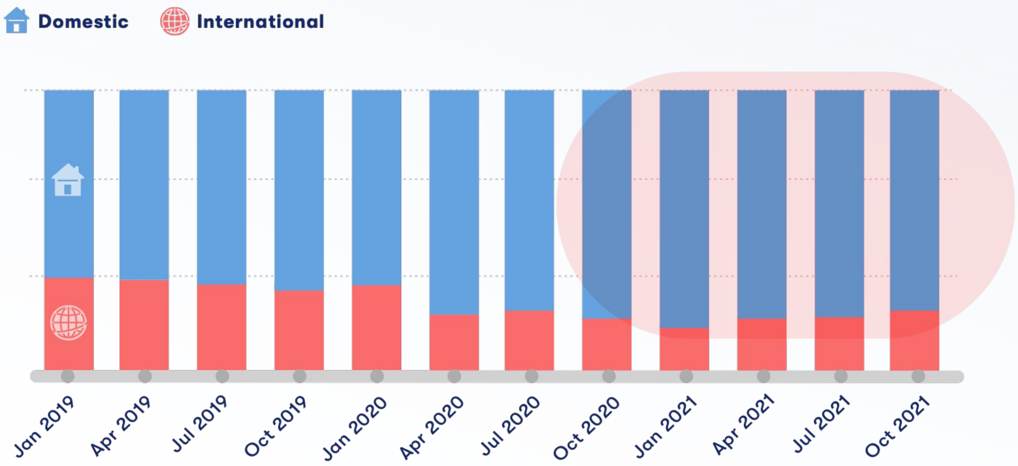
Staycations have increased dramatically

1 **Domestic travel is booming.**
1 in 4 journeys which was international pre-COVID is now domestic.

2 **Spaniards and Italians are more than happy exploring their home countries.**
In both Spain and Italy, countries which already had an exceptionally high amount of domestic travel, saw the amount of international half from 2019 to 2021.

3 **Germany is the only exception to this rule.**
Germany is the only one of our core market countries where international travel increased again after dropping in 2020, whereas in the UK, international travel plummeted from 14% to 2%, though this of course could additionally reflect Brexit and other factors.

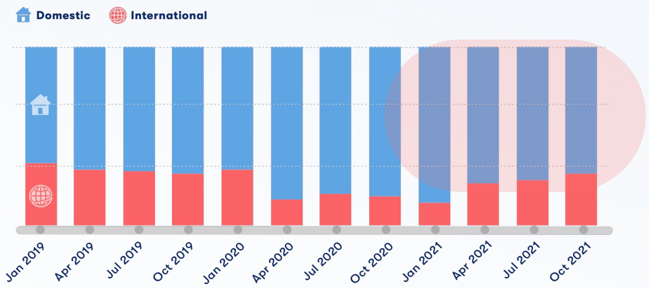
Cross-border travel: Global data



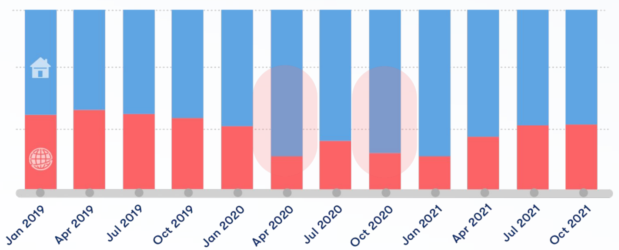
Key takeaway
Overall, there's been a notable and sustained increase in the amount of travelling happening domestically, implying many people are re-discovering their home countries as valuable travel destinations.

QUARTER	INTERNATIONAL QoQ %	DOMESTIC QoQ %
January 2019	Baseline	
April 2019	-3%	2%
July 2019	-3%	2%
October 2019	1%	0%
January 2020	-1%	1%
April 2020	-34%	15%
July 2020	7%	-2%
October 2020	-12%	3%
January 2021	-16%	4%
April 2021	17%	-3%
July 2021	3%	-1%
October 2021	12%	-3%

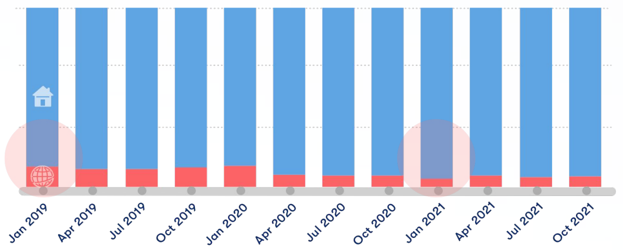
Cross-border travel: France, Germany, Italy



Key takeaway France
France had the strongest rebound of international travel in Q2 when restrictions were loosened, but there was only a minor corresponding decrease in domestic travel.



Key takeaway Germany
Domestic travel in **Germany** only peaked after the first lockdown (in Q2 2020) and before second lockdown (in Q4), most German travellers seem to travel abroad.



Key takeaway Italy
Domestic travel was barely impacted in **Italy,** while international travel halved from Jan 2019 to Dec 2021.

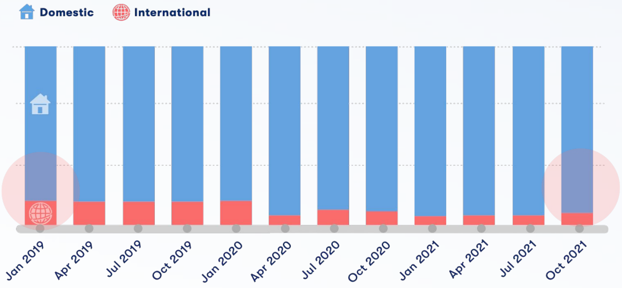
DOMESTIC DATA

	FRANCE	GERMANY	ITALY	SPAIN	UK
January 2019	Baseline				
April 2019	6%	-4%	2%	0%	1%
July 2019	2%	4%	0%	0%	4%
October 2019	2%	4%	-1%	0%	0%
January 2020	-4%	7%	-1%	0%	0%
April 2020	25%	26%	6%	10%	8%
July 2020	-4%	-10%	0%	-3%	0%
October 2020	2%	10%	0%	1%	2%
January 2021	4%	2%	2%	3%	1%
April 2021	-13%	-13%	-2%	-1%	1%
July 2021	-2%	-9%	1%	0%	0%
October 2021	-5%	0%	-1%	-1%	-1%

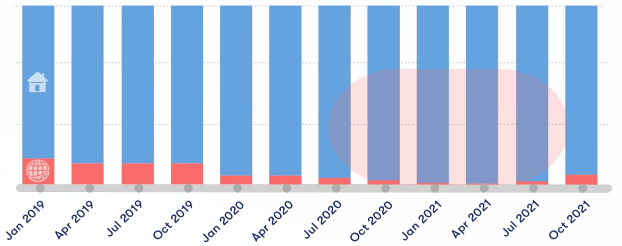
INTERNATIONAL DATA

	FRANCE	GERMANY	ITALY	SPAIN	UK
January 2019	Baseline				
April 2019	-10%	6%	-13%	-1%	-3%
July 2019	-4%	-5%	2%	-1%	-21%
October 2019	-4%	-6%	9%	1%	2%
January 2020	9%	-10%	5%	3%	1%
April 2020	-53%	-47%	-43%	-60%	-55%
July 2020	22%	45%	-3%	58%	4%
October 2020	-9%	-26%	-3%	-11%	-24%
January 2021	-23%	-9%	-25%	-35%	-27%
April 2021	89%	59%	36%	10%	-35%
July 2021	7%	22%	-15%	2%	-20%
October 2021	15%	0%	14%	23%	57%

Cross-border travel: Spain, UK



Key takeaway Spain
Spain led slightly in Q2 2020, following the onset of the pandemic, while international travel halved from Jan 2019 to Dec 2021 (with a slight increase in Q4 2021).



Key takeaway United Kingdom
International travel from the **UK** took a heavy hit over the pandemic from 2020-2021, only beginning to increase again in Q4 2021 (other factors of uncertainty such as Brexit could also play a role here).

DOMESTIC DATA

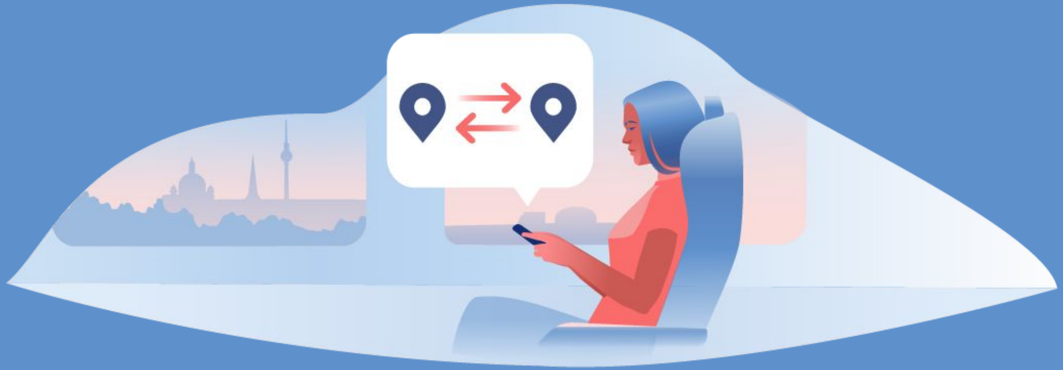
	FRANCE	GERMANY	ITALY	SPAIN	UK
January 2019	Baseline				
April 2019	6%	-4%	2%	0%	1%
July 2019	2%	4%	0%	0%	4%
October 2019	2%	4%	-1%	0%	0%
January 2020	-4%	7%	-1%	0%	0%
April 2020	25%	26%	6%	10%	8%
July 2020	-4%	-10%	0%	-3%	0%
October 2020	2%	10%	0%	1%	2%
January 2021	4%	2%	2%	3%	1%
April 2021	-13%	-13%	-2%	-1%	1%
July 2021	-2%	-9%	1%	0%	0%
October 2021	-5%	0%	-1%	-1%	-1%

INTERNATIONAL DATA

	FRANCE	GERMANY	ITALY	SPAIN	UK
January 2019	Baseline				
April 2019	-10%	6%	-13%	-1%	-3%
July 2019	-4%	-5%	2%	-1%	-21%
October 2019	-4%	-6%	9%	1%	2%
January 2020	9%	-10%	5%	3%	1%
April 2020	-53%	-47%	-43%	-60%	-55%
July 2020	22%	45%	-3%	58%	4%
October 2020	-9%	-26%	-3%	-11%	-24%
January 2021	-23%	-9%	-25%	-35%	-27%
April 2021	89%	59%	36%	10%	-35%
July 2021	7%	22%	-15%	2%	-20%
October 2021	15%	0%	14%	23%	57%

Advanced planning time:

How far in advance are people planning to travel?



Advanced planning time: What the data shows

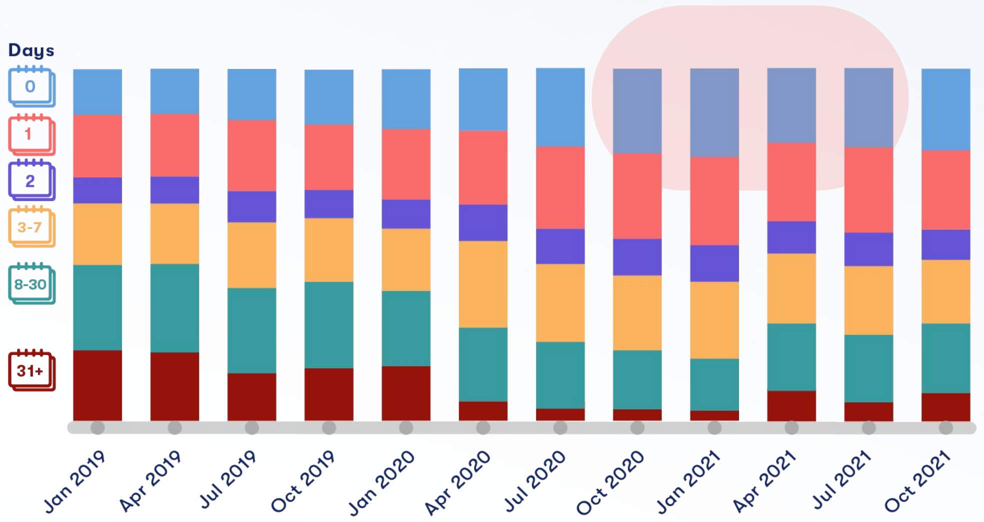
There has been a significant increase in last-minute bookings

1 **Once markets reopened, travellers were keen to plan.**
Following COVID-variant waves, long-term (61+ days in advance) and mid-term (31-60 days) travel bookings increased significantly.

2 **The uncertainty of COVID forced people to make same-day travel decisions.**
There was steady increase in same day-bookings following the outbreak of the pandemic.

3 **Compared to other markets, the Italians were the most last-minute with bookings.**
Italians travelled more and more last-minute (two-days before, one day before, same day bookings) than other core markets.

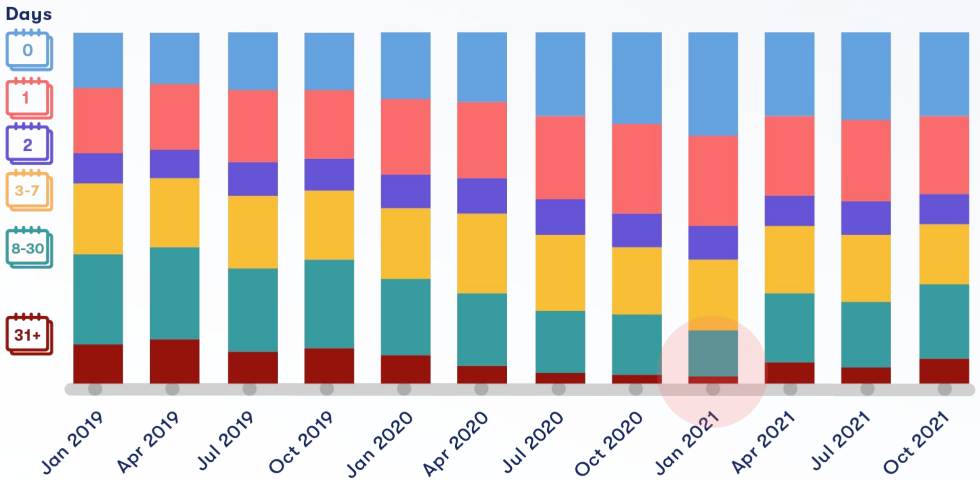
Advance planning time: Global booking data



Key takeaway
Approximately every third journey was booked at least a week in advance pre-COVID - now 3 out of 4 are booked within a week, and more than 20% of bookings are on the day of departure.

QUARTER	61+	31-60	8-30	3-7	2	1	0
January 2019	Baseline						
April 2019	-3%	2%	-3%	2%	-3%	2%	2%
July 2019	-3%	2%	-3%	2%	-3%	2%	2%
October 2019	1%	0%	1%	0%	1%	0%	0%
January 2020	-1%	1%	-1%	1%	-1%	1%	1%
April 2020	-34%	15%	-34%	15%	-34%	15%	15%
July 2020	7%	-2%	7%	-2%	7%	-2%	-2%
October 2020	-12%	3%	-12%	3%	-12%	3%	3%
January 2021	-16%	4%	-16%	4%	-16%	4%	4%
April 2021	17%	-3%	17%	-3%	17%	-3%	-3%
July 2021	3%	-1%	3%	-1%	3%	-1%	-1%
October 2021	12%	-3%	12%	-3%	12%	-3%	-3%

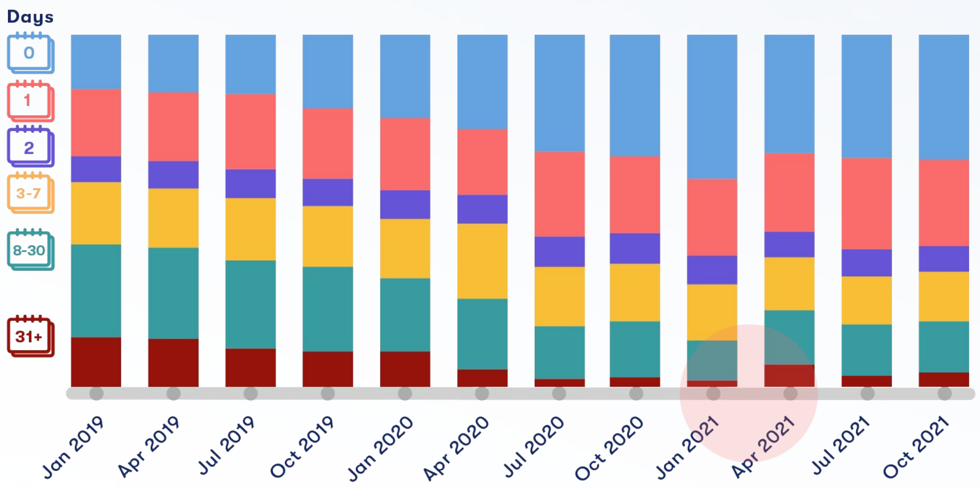
Advance planning time: French booking data



Key takeaway
In France, future travel planning (more than 30 days in advance) only increased following the second lockdown (Q2 2021), prior to that, there was a steady increase in same-day bookings.

QUARTER	61+	31-60	8-30	3-7	2	1	0
January 2019	Baseline						
April 2019	0%	12%	3%	-3%	-3%	-2%	-6%
July 2019	-55%	-27%	-5%	9%	16%	18%	17%
October 2019	32%	13%	3%	-4%	-7%	-6%	-1%
January 2020	13%	-20%	-14%	0%	9%	10%	14%
April 2020	-70%	-37%	-2%	17%	8%	4%	9%
July 2020	-68%	-45%	-13%	-4%	4%	10%	23%
October 2020	61%	-11%	-6%	-10%	-5%	6%	11%
January 2021	-18%	-22%	-23%	3%	2%	4%	11%
April 2021	290%	213%	50%	-7%	-14%	-15%	-20%
July 2021	-60%	-27%	-3%	2%	9%	5%	6%
October 2021	110%	65%	9%	-9%	-11%	-6%	-6%

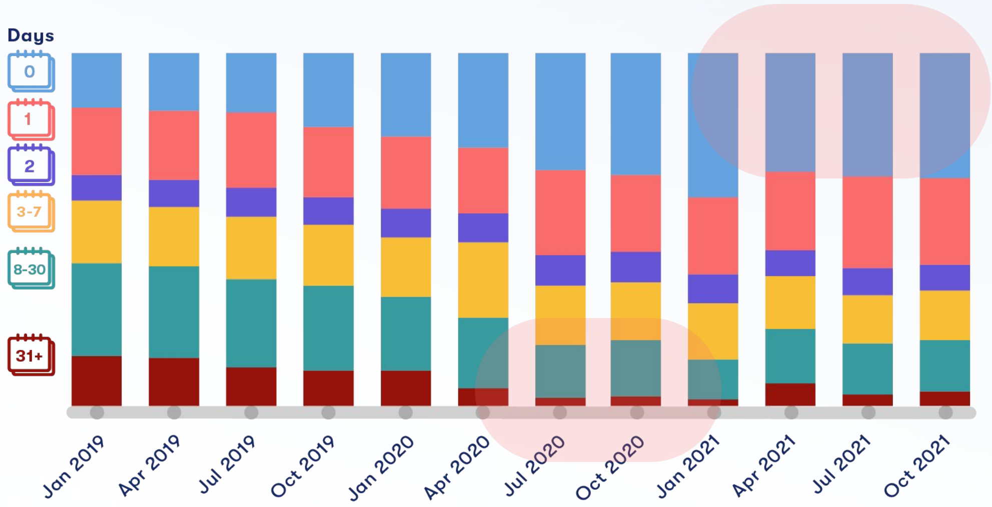
Advance planning time: German booking data



Key takeaway
In Germany, travel planning time was only marginally impacted by the pandemic; but there was a surge in long-term planning in Q2 2021, following the second lockdown.

QUARTER	61+	31-60	8-30	3-7	2	1	0
January 2019	Baseline						
April 2019	-17%	7%	3%	3%	0%	-2%	-2%
July 2019	-49%	-18%	1%	11%	15%	15%	5%
October 2019	23%	20%	-2%	-8%	-9%	-5%	9%
January 2020	41%	-25%	-11%	4%	13%	11%	9%
April 2020	-84%	-60%	-11%	42%	34%	18%	0%
July 2020	-41%	7%	18%	-5%	-9%	-8%	2%
October 2020	-10%	-25%	-19%	-1%	12%	17%	19%
January 2021	48%	-11%	-3%	6%	1%	-2%	-4%
April 2021	149%	127%	15%	-13%	-13%	-9%	-5%
July 2021	-51%	-10%	9%	-1%	-1%	-3%	4%
October 2021	89%	50%	1%	-9%	-7%	-6%	-1%

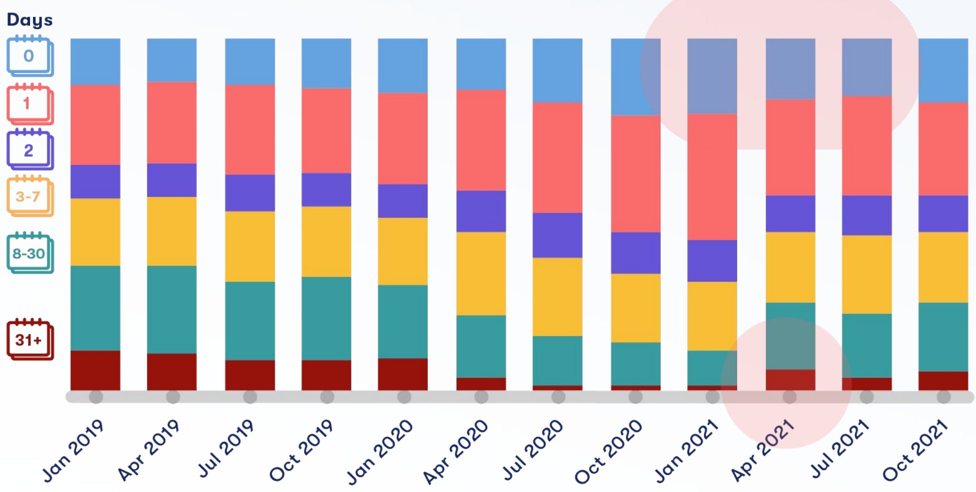
Advance planning time: Italian booking data



Key takeaway
There was a steep drop in advanced planning following the onset of the pandemic, with a correlating increase in same-day travel bookings.

QUARTER	61+	31-60	8-30	3-7	2	1	0
January 2019	Baseline						
April 2019	-16%	-2%	0%	-4%	1%	8%	5%
July 2019	-45%	-15%	0%	8%	14%	11%	9%
October 2019	20%	-12%	-4%	0%	-7%	-7%	21%
January 2020	55%	-2%	-15%	-7%	-2%	1%	10%
April 2020	-82%	-48%	4%	34%	13%	-5%	22%
July 2020	-72%	-50%	-26%	-19%	5%	31%	25%
October 2020	145%	16%	7%	-4%	-3%	-9%	3%
January 2021	-16%	-36%	-27%	-3%	-3%	-1%	19%
April 2021	255%	245%	29%	-5%	-11%	0%	-20%
July 2021	-78%	-47%	-3%	-8%	7%	21%	6%
October 2021	48%	23%	2%	1%	-7%	-6%	2%

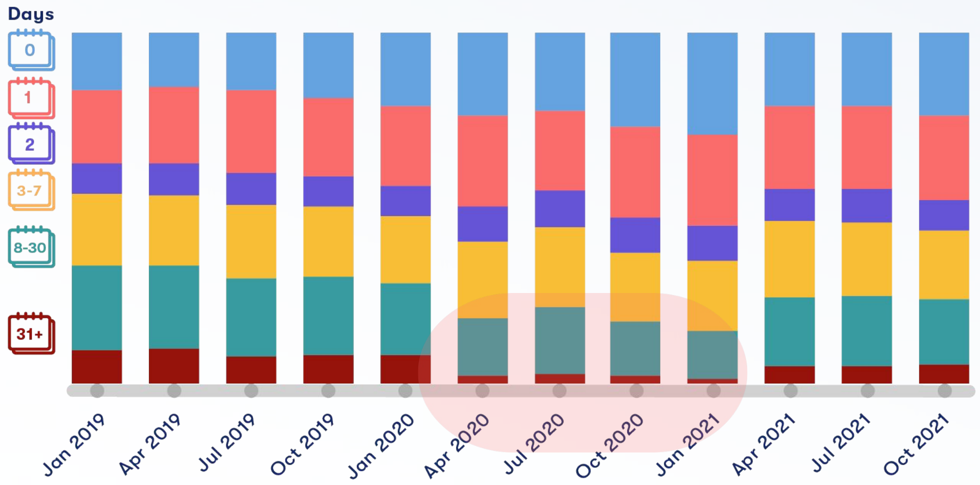
Advance planning time: Spanish booking data



Key takeaway
From the end of 2020, there was an increase in long-term planning and decrease in last-minute travel booking.

QUARTER	61+	31-60	8-30	3-7	2	1	0
January 2019	Baseline						
April 2019	-20%	-7%	7%	2%	1%	2%	-3%
July 2019	-46%	-17%	-9%	7%	14%	12%	10%
October 2019	18%	3%	5%	-1%	-7%	-6%	4%
January 2020	70%	0%	-13%	-7%	-2%	4%	8%
April 2020	-74%	-58%	-12%	29%	26%	18%	-3%
July 2020	-76%	-55%	-21%	-4%	7%	10%	28%
October 2020	4%	-16%	-11%	-13%	-7%	6%	20%
January 2021	81%	-8%	-17%	0%	0%	7%	-3%
April 2021	277%	384%	82%	0%	-14%	-25%	-21%
July 2021	-65%	-37%	-1%	12%	14%	4%	-4%
October 2021	77%	51%	5%	-9%	-12%	-6%	11%

Advance planning time: UK booking data



Key takeaway
In the UK, last-minute travel was preferable pre-pandemic and has remained this way, with a decrease in advance bookings happening through the pandemic.

QUARTER	61+	31-60	8-30	3-7	2	1	0
January 2019	Baseline						
April 2019	-14%	5%	0%	0%	5%	4%	-4%
July 2019	-37%	-22%	-4%	5%	8%	10%	9%
October 2019	5%	4%	0%	-3%	-7%	-6%	15%
January 2020	46%	-3%	-8%	-7%	0%	0%	10%
April 2020	-71%	-68%	-18%	20%	19%	19%	17%
July 2020	-54%	20%	17%	6%	2%	-10%	-5%
October 2020	-34%	-27%	-19%	-12%	-2%	12%	21%
January 2021	85%	-27%	-13%	0%	-1%	1%	7%
April 2021	151%	224%	43%	7%	-6%	-12%	-29%
July 2021	-22%	-3%	5%	-3%	-2%	2%	1%
October 2021	-19%	11%	-7%	-8%	-5%	3%	12%

Long-tail travel:

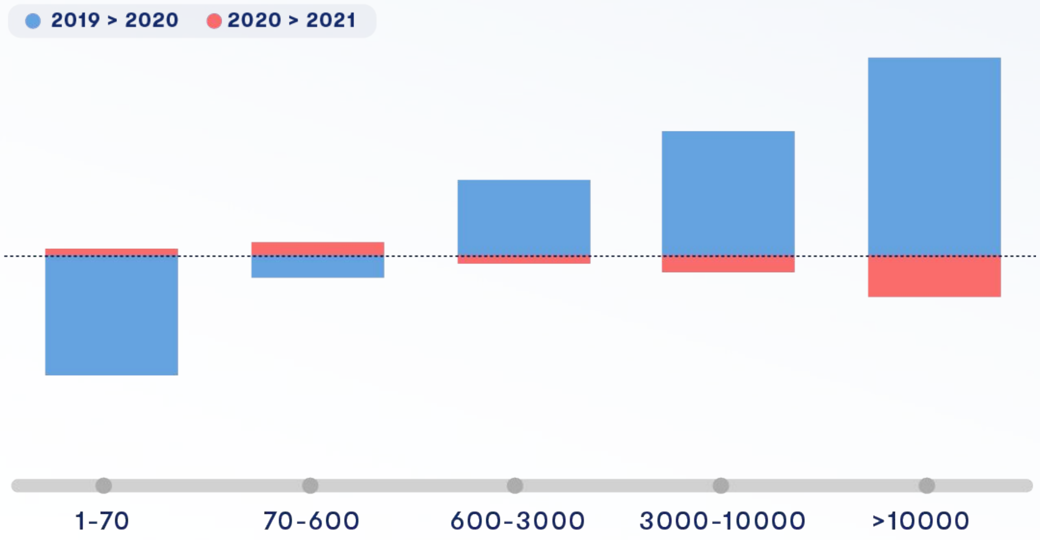
Are travellers seeking out new destinations?

Off-the-beaten-track travel has increased

1 **Getting away from it all became more of a literal sentiment.**
Long-tail destinations have picked up a percentage share of travellers, implying a desire in people to explore new and perhaps more rural destinations.

2 **Cities continue to entice as much as the countryside.**
There continues to be an even spread of people travelling to big cities and rural areas.

Long-tail travel: Global booking data



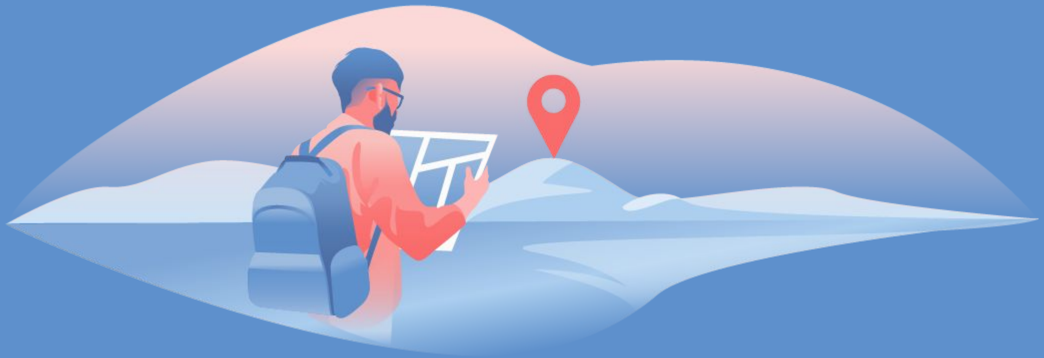
Key takeaway
COVID-19 has brought out the exploration desire in people; we see a gradual shift from the most popular routes to more long-tail ones. A small shift back has already occurred as the impact of COVID-19 on travel eases

ROUTE POPULARITY (ranked by most booked)	2019 > 2020	2020 > 2021
1st-10th	-38%	23%
11st-30th	-24%	-7%
31st-70th	-16%	3%
71st-150th	-11%	6%
151st-300th	-2%	0%
301th-600	0%	3%
601st-1300th	6%	0%
1301st-3000th	15%	-1%
3001st-10000th	27%	-4%
>10000th	42%	-9%

 | Data shown here is quarter on quarter % increase data (based on most booked routes, total booking #) from Jan 2019 to Dec 2021. It looks at all of Omio's bookings.

Passenger count:

Has solo-travel increased?



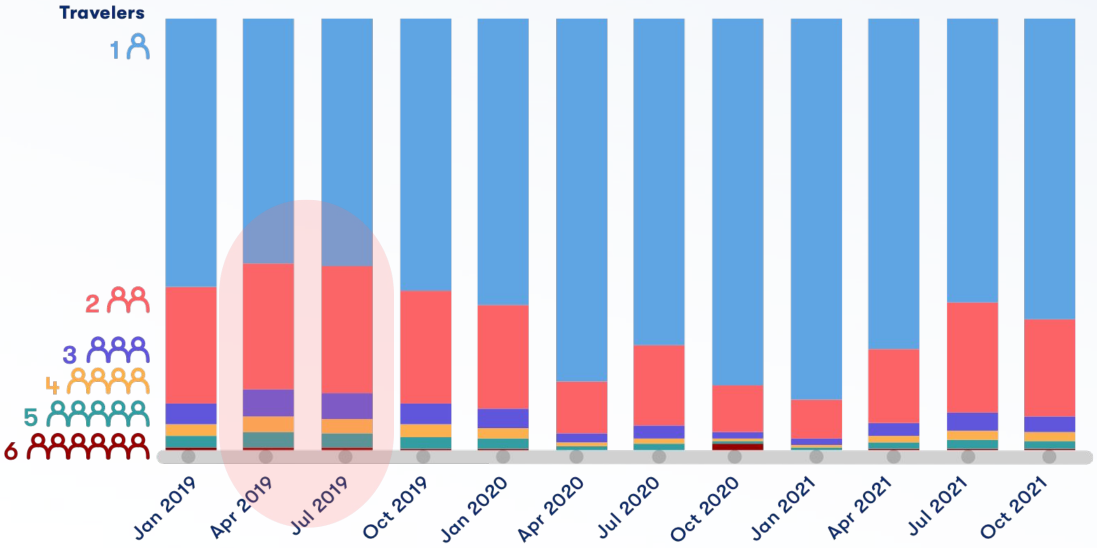
Passenger count: What the data shows

A major change in the way people book travel together

1 **Booking travel is simpler if you do it for yourself.**
The majority of people book tickets for one.

2 **Once the vaccine programme rolled out, group bookings picked up.**
But group bookings (2+ tickets) across different transportation modes increased from Q2 2021.

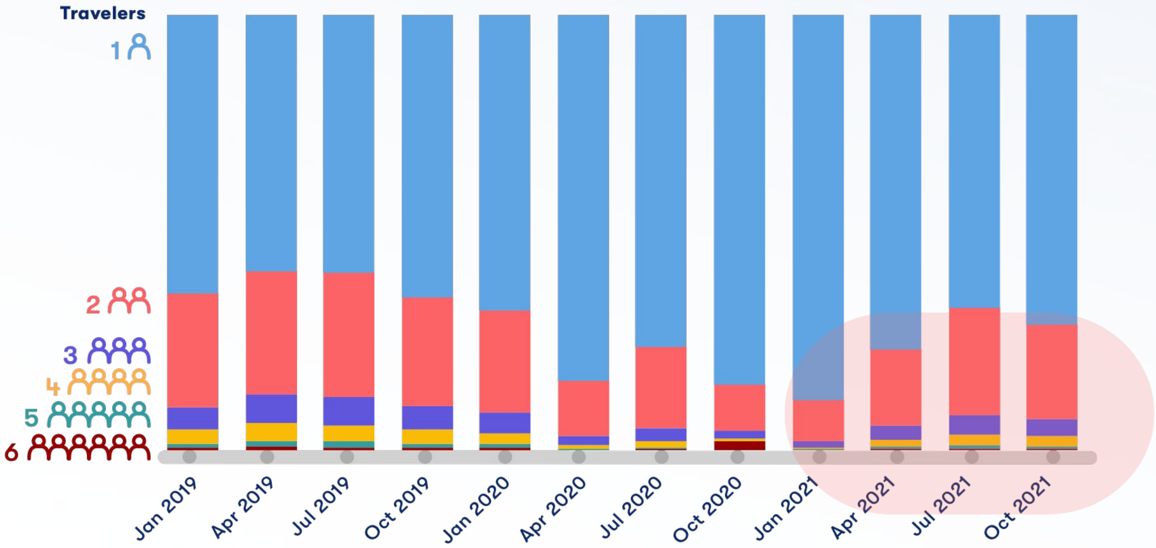
Passenger count: Global booking data



Key takeaway
People are travelling together about as much as alone. But summer 2019 was even higher at a 2:1 ratio.

QUARTER	6+	5	4	3	2	1
January 2019	Baseline					
April 2019	32%	36%	33%	22%	9%	-7%
July 2019	-9%	-9%	-7%	-3%	1%	0%
October 2019	-22%	-17%	-20%	-17%	-12%	9%
January 2020	-5%	-14%	-13%	-11%	-7%	4%
April 2020	-70%	-57%	-63%	-52%	-47%	23%
July 2020	41%	38%	45%	42%	48%	-9%
October 2020	599%	-55%	-53%	-47%	-42%	12%
January 2021	-95%	-16%	-10%	-8%	-13%	4%
April 2021	339%	196%	179%	109%	87%	-13%
July 2021	34%	33%	40%	36%	41%	-12%
October 2021	-17%	-10%	-11%	-12%	-12%	6%

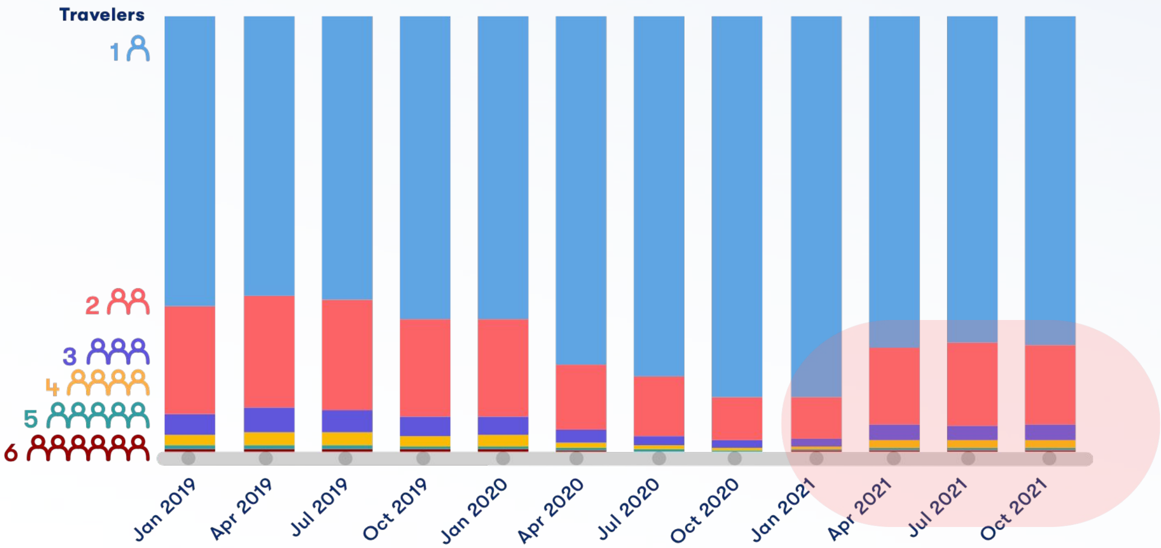
Passenger count: Flight booking data



Key takeaway
From Q2 2021, there was a steep increase in bookings of 2-4 people, where as in the preceding year, there was a small increase in the number of people flying alone.

QUARTER	6+	5	4	3	2	1
January 2019	Baseline					
April 2019	14%	22%	15%	16%	3%	-3%
July 2019	-5%	-4%	-5%	-5%	0%	1%
October 2019	-19%	-14%	-15%	-18%	-11%	7%
January 2020	8%	0%	2%	-1%	-1%	0%
April 2020	-38%	-40%	-44%	-30%	-34%	15%
July 2020	-51%	-13%	-33%	-27%	-7%	3%
October 2020	-39%	-33%	-25%	-28%	-28%	6%
January 2021	114%	12%	7%	16%	-2%	0%
April 2021	99%	73%	140%	83%	84%	-13%
July 2021	-12%	-6%	-3%	0%	8%	-2%
October 2021	4%	13%	7%	1%	-4%	1%

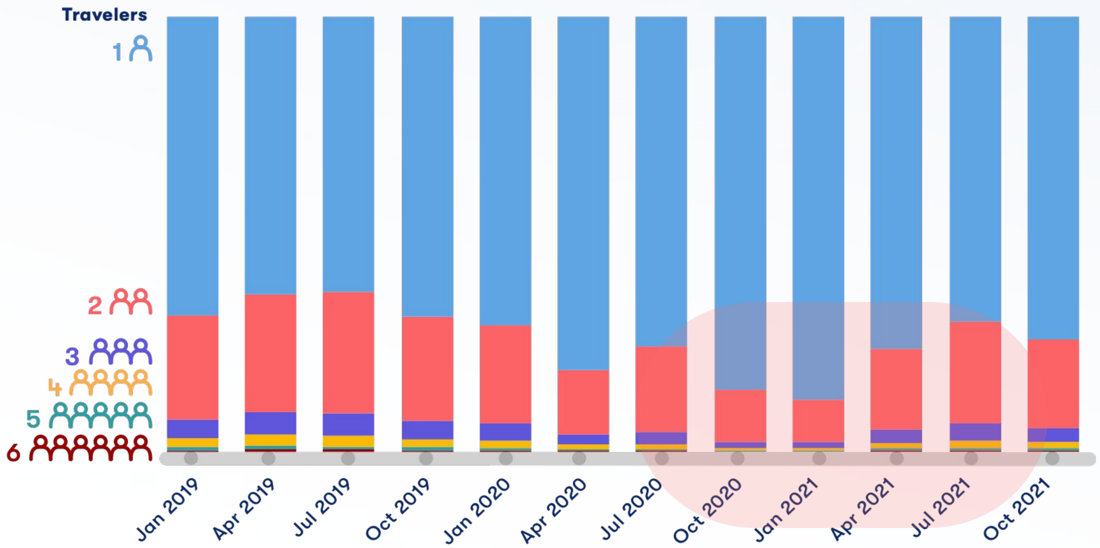
Passenger count: Train booking data



Key takeaway
During the early onset of the pandemic, there was an increase in travellers travelling alone on trains. But in the summer 2021, there was a steep increase in the percentage of 2+ travellers booking together.

QUARTER	6+	5	4	3	2	1
January 2019	Baseline					
April 2019	36%	38%	36%	24%	8%	-8%
July 2019	-7%	-9%	-8%	-4%	1%	1%
October 2019	-24%	-16%	-20%	-16%	-11%	9%
January 2020	-9%	-16%	-16%	-13%	-8%	6%
April 2020	-79%	-64%	-68%	-56%	-50%	26%
July 2020	78%	57%	63%	52%	54%	-10%
October 2020	855%	-57%	-55%	-48%	-43%	12%
January 2021	-97%	-21%	-11%	-9%	-13%	4%
April 2021	405%	214%	187%	111%	85%	-13%
July 2021	46%	41%	49%	41%	49%	-14%
October 2021	-21%	-8%	-10%	-10%	-11%	6%

Passenger count: Bus booking data



Key takeaway
There was a decrease in group bookings for the year following the outbreak of the COVID-19 pandemic, but an increase from Q2 2021.

QUARTER	6+	5	4	3	2	1
January 2019	Baseline					
April 2019	27%	34%	29%	19%	13%	-7%
July 2019	-12%	-5%	-2%	2%	2%	-1%
October 2019	-18%	-20%	-22%	-19%	-14%	9%
January 2020	-2%	-13%	-10%	-9%	-5%	3%
April 2020	-16%	-28%	-43%	-40%	-34%	14%
July 2020	-25%	-7%	13%	31%	32%	-7%
October 2020	-43%	-58%	-51%	-47%	-39%	13%
January 2021	-26%	5%	-8%	-8%	-17%	3%
April 2021	226%	174%	162%	107%	87%	-13%
July 2021	15%	22%	24%	30%	26%	-8%
October 2021	-8%	-17%	-16%	-18%	-13%	6%

 The Omio European Mobility Report | Data shown here is quarter on quarter % increase data (based on total # of bookings) from Jan 2019 to Dec 2021.

“Travel intent and demand is stronger than ever in 2022.”

— **Yesh Munnangi**, CEO of Rome2rio, part of the Omio Group

About Omio

Since launching in 2013, Omio has helped customers discover different ways to travel. We are an all-encompassing travel hub, one that supports our customers' need to explore Europe, the United States and Canada via train, bus, flight and ferry.

Omio is active in 37 countries and has partnerships with 1000+ different transportation providers across modes (train, bus, flight and ferry). Customers can book in 21 different languages and pay 26 different currencies. In the last 8 years, we have sold more than 33 million tickets.

From a small startup of just a few people, our team has grown to 300 employees hailing from more than 50 countries who work at offices in Berlin, Prague, Melbourne, and London. We come together daily to bring our vision to fruition, with the goal of empowering customers to embark on journeys that move them.

For more information or interview requests, please contact:

Emily McDonnell, Corporate Communications Manager and Omio's Spokesperson

— press@omio.com

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