



# SKIFT TRAVEL HEALTH INDEX

## APRIL 2022 HIGHLIGHTS

### SKIFT RESEARCH TAKE

The latest data and insights from our partners shows that the travel industry is continuing to return to 'traditional' levels of demand, and traveler behavior is looking increasingly like it did before the pandemic.

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# REPORT OVERVIEW

This report highlights the latest insights from the Skift Travel Health Index. The index covers travel's performance since January 2020, up to and including April 2022.

The Skift Travel Health Index is a real-time measure of the performance of the travel industry at large, and the core verticals within it. The Index provides the travel industry with a powerful tool for strategic planning, which is of utmost importance as times remain uncertain.

Skift Research launched the Index in May 2020 as the Skift Recovery Index. At the start of 2022 we rebranded the Index as the Skift Travel Health Index, to reflect some far-ranging changes: the addition of many more indicators, additional data partners, and most importantly, our continued effort to track the industry health beyond the impact of the Covid-19 pandemic.

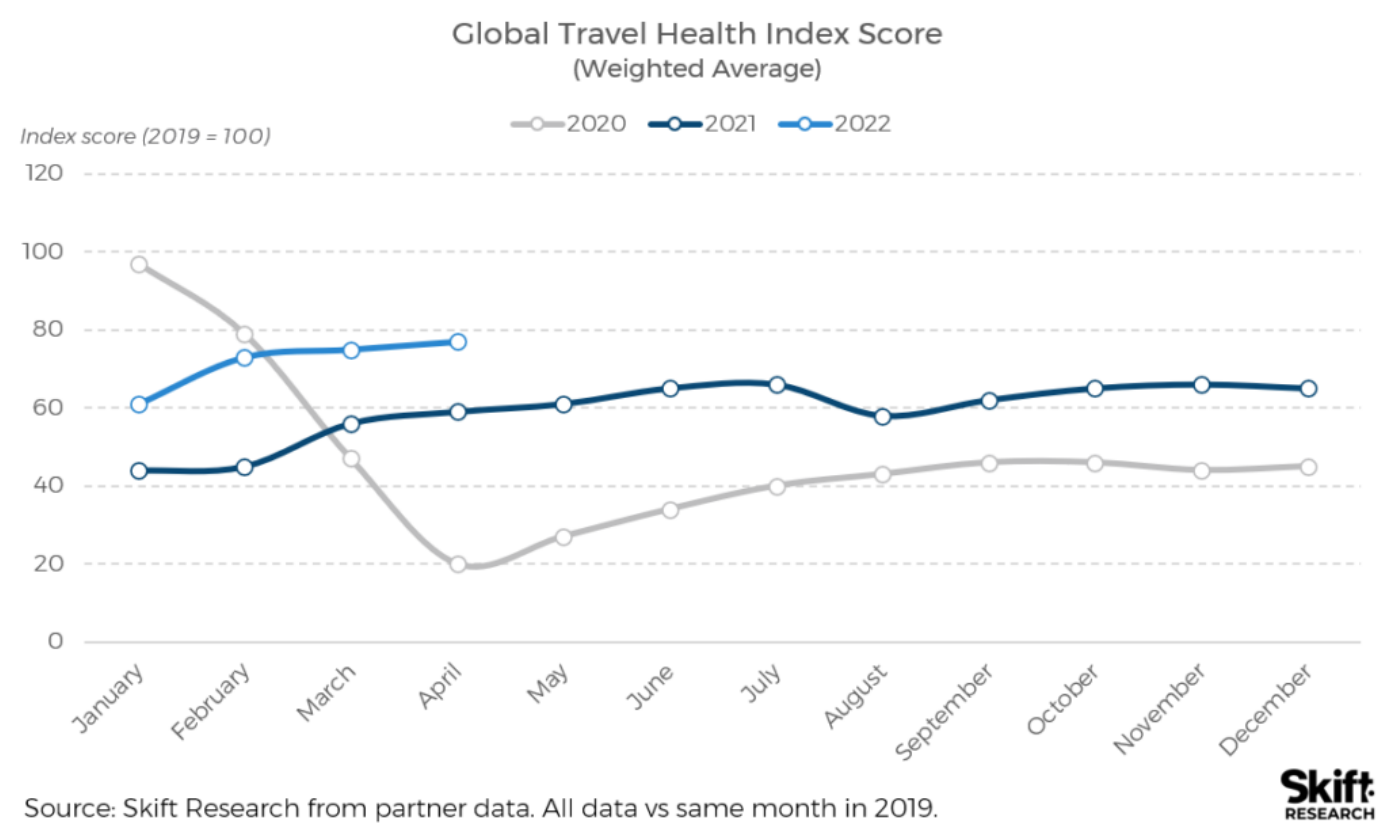
We are thankful for the support of our data partners: [Amadeus](#), [Aviasales](#), [Beyond](#), [CarTrawler](#), [Cendyn](#), [Collinson](#), [Criteo](#), [Duetto](#), [ForwardKeys](#), [Hotelbeds](#), [Key Data Dashboard](#), [OAG](#), [Onyx CenterSource](#), [OTA Insight](#), [RateGain](#), [Shiji Group](#), [Skyscanner](#), [Sojern](#), [Transparent](#), and [TrustYou](#). Their data allows us to provide you with a monthly assessment of travel's performance.

*In this latest Skift Travel Health Index update we are taking a slightly different approach, speaking with Skyscanner's Vice President of Flights Hugh Aitken to get his views on how the aviation industry and the broader travel industry are recovering.*

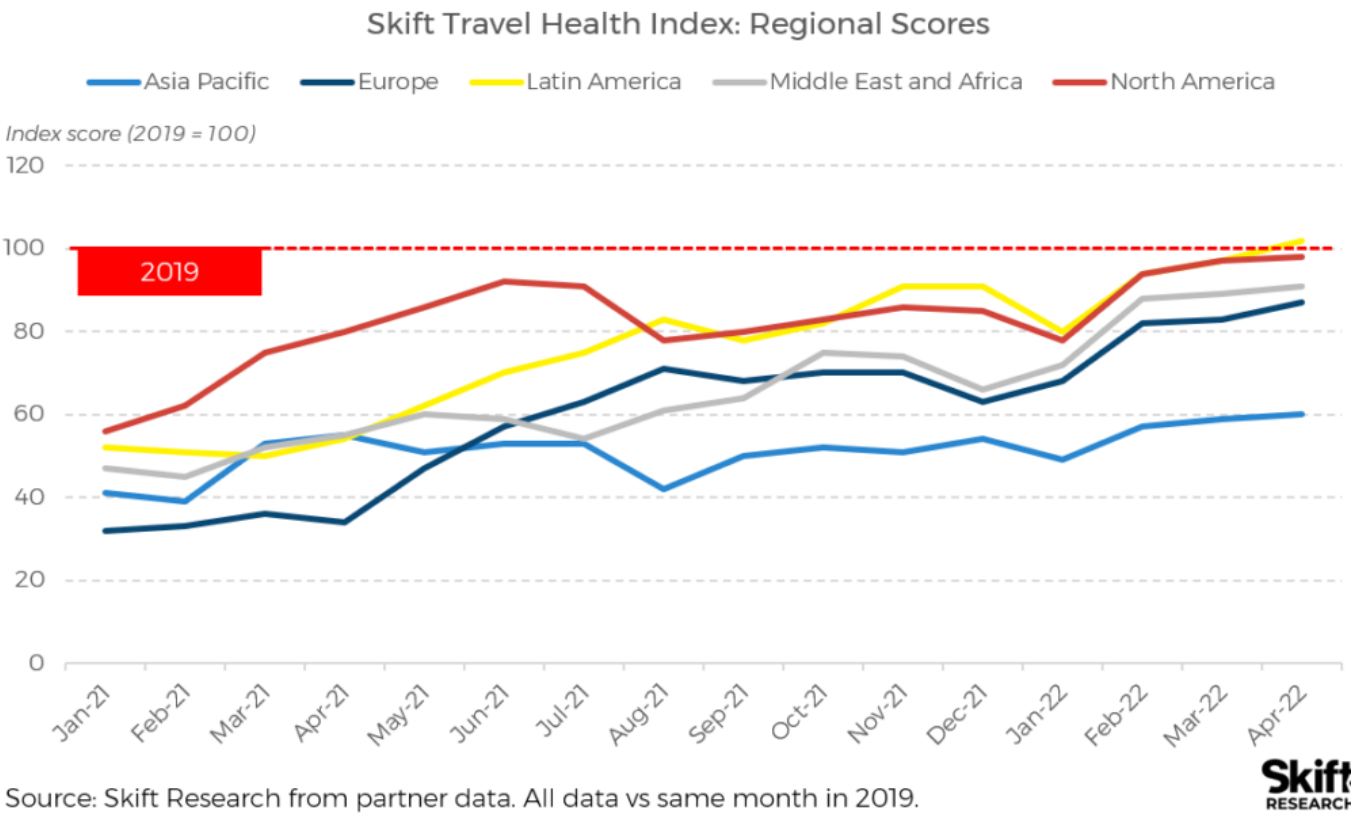
*But as you are used to by now, first a quick update on the latest Index data.*

# WHAT A DIFFERENCE TWO YEARS MAKES

Exactly two years ago, April 2020, was the all time low of the pandemic, with the Index recording a score of 20. April 2022 registered the highest score since, with the Index now standing at 77 points, against a 2019 baseline of 100. This means that the travel industry, measured using a myriad of indicators, has recovered to 77% of pre-pandemic levels.



All regions performed positively during April, with Latin and North America just crossing and closely approaching 2019 levels of travel performance. Asia Pacific is the weakest performing region, sitting at around 60% of pre-pandemic travel performance.



Old news by now is the fact that Russia and China continue to see their performance decline. The former due to the continued war in Ukraine, which means sanctions and flight bans. The latter due to lockdowns of districts and cities to halt Omicron outbreaks, which are now being lifted. This hampered domestic travel; there was little to no pre-existing international travel with country borders still closed.

China and Hong Kong are weighing heavily on the global recovery of travel. Japan, also, is still not back to 50% of pre-pandemic performance, but with recent announcements of border openings to more tourists, this will likely change in the coming months.

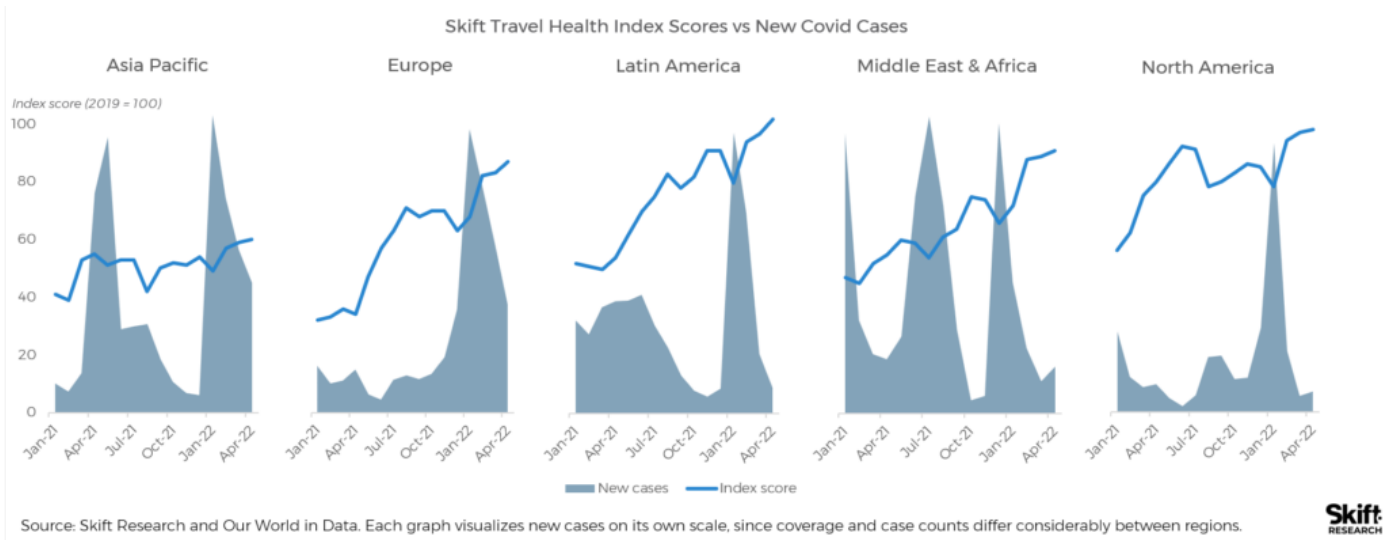
At the top of the table, it is a mixed bag of reopening Asian countries, and European and Latin American countries seeing strong recovery after being impacted hard by the Omicron variant.

	Index score		MoM Growth	MoM Growth
	March	April	(abs)	(%)
Thailand	60.3	70.7	10.4	17.2%
Argentina	85.2	98.9	13.7	16.1%
Singapore	66.4	76.7	10.3	15.5%
Indonesia	64.4	71.4	7.0	10.9%
Germany	71.9	79.6	7.7	10.7%
India	85.8	94.5	8.7	10.1%
Italy	85.2	92.2	7.0	8.2%
Turkey	97.8	104.2	6.4	6.5%
Australia	85.5	91	5.5	6.4%
Brazil	97.3	103	5.7	5.9%
Japan	47.2	48.8	1.6	3.4%
United Arab Emirates	97.5	100.4	2.9	3.0%
United Kingdom	91.2	93.3	2.1	2.3%
South Africa	76.7	78.3	1.6	2.1%
France	93.2	95	1.8	1.9%
U.S.	97.8	99.3	1.5	1.5%
Canada	90.1	91.2	1.1	1.2%
Spain	87.8	88.7	0.9	1.0%
Hong Kong, China	33.5	33	-0.5	-1.5%
Mexico	109.3	106.1	-3.2	-2.9%
China	50.7	46.5	-4.2	-8.3%
Russia	56.4	51.4	-5.0	-8.9%

Source: Skift Research from partner data

# THE IMPACT OF OMICRON IS WANING

While data on new Covid cases is undoubtedly becoming less reliable, with more and more countries removing official testing requirements (instead opting for self testing regimes), the data still provides the best indication of new outbreaks. Comparing the regional scores with monthly new Covid cases in each region shows that Omicron is waning in all regions, with Asia Pacific and Europe still seeing the highest numbers relative to each region’s peak.



Omicron had an impact on all regions’ travel performance, with Latin America’s travel score impacted most. All regions, however, showed a quick rebound, with Europe and Middle East and Africa the slowest to recover, but still registering scores that were above the pre-Omicron performance within two months.

## THE IMPACT OF OMICRON WAS SHORT-LIVED

Region	Month of Omicron slump	Drop in Index score vs previous month	Time for Index score to recover to pre-Omicron level
Asia Pacific	Jan-22	5 Index points	1 month
Europe	Dec-21	7 points	2 months
Latin America	Jan-22	11 points	1 month
Middle East & Africa	Dec-21	8 points	2 months
North America	Jan-22	8 points	1 month

Source: Skift Research



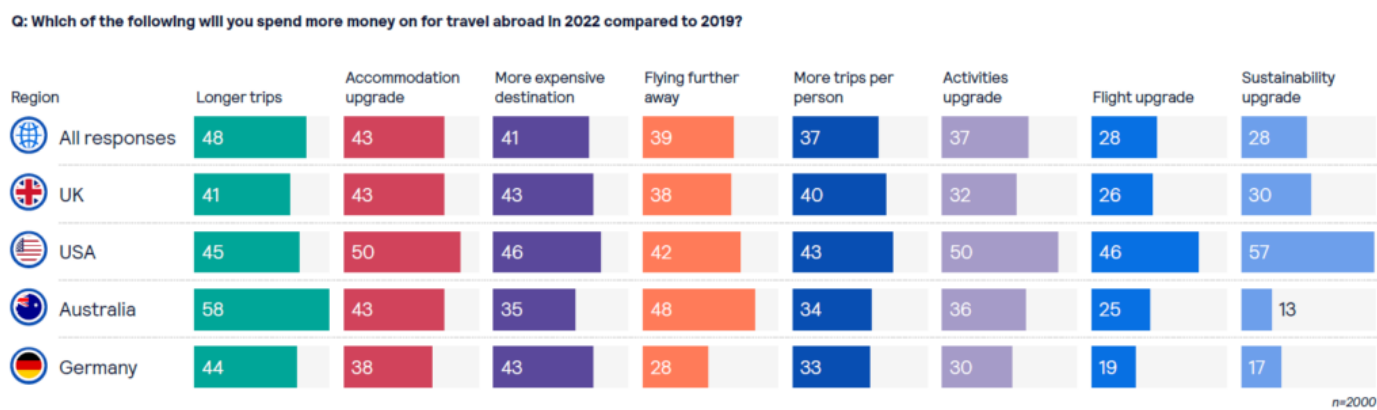
# Q&A WITH HUGH AITKEN, VP OF FLIGHTS AT SKYSCANNER

Our data partner Skyscanner released its latest [Horizons report](#), combining search and booking data from its platform with additional surveys. The report provides interesting insights into how some of the pre-pandemic booking behaviors are starting to return, as well as insights into popular destinations for the rest of 2022.

We spoke with Hugh Aitken, Skyscanner's Vice President of Flights, to dive a little deeper into the data:

**SKIFT RESEARCH: THERE IS A LOT OF TALK ABOUT PENT-UP DEMAND AND REVENGE TRAVEL. WHAT DID YOUR SURVEY FIND REGARDING EXPECTED SPENDING LEVELS ON TRAVEL THIS COMING YEAR?**

Hugh Aitken: We see strong demand for international travel, especially for the summer across all regions. Our research shows that travelers are set to prioritize spending on travel in 2022. 86% of survey respondents plan to spend more or the same on international travel than they did in 2019, with 40% planning to spend more. However, travelers are price sensitive, and cost remains a key factor in booking.



Source: Skyscanner Horizons report

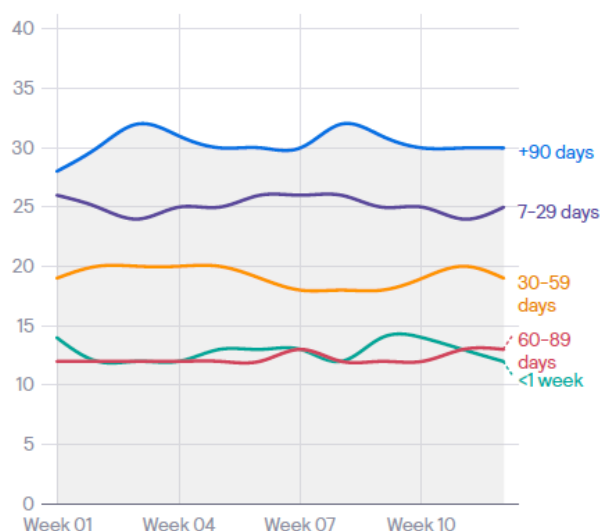
**SR: THE INDUSTRY HAS SEEN SOME MAJOR SHIFTS IN BOOKING AND TRAVEL BEHAVIOR, BUT THE QUESTION REMAINS: ARE THESE SHIFTS PERMANENT? HOW IS YOUR BOOKING DATA LOOKING TODAY, COMPARED TO BEFORE THE PANDEMIC?**

HA: We see signals that ‘traditional’ travel patterns are returning in many parts of the world, booking horizons are lengthening and trip duration is up for the important summer season.

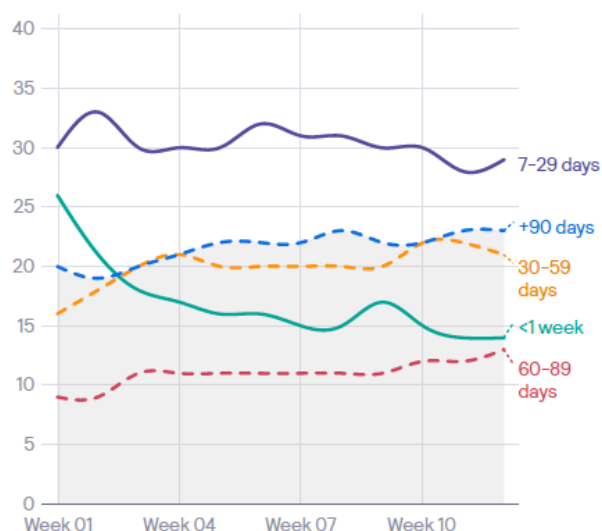
What we saw during the pandemic, certainly in the last year or so when travel has come back, was a shift to short booking horizons – for example a destination re-opened and the pent-up demand meant travelers booked very soon after, whether for leisure or to reunite with friends and family.

What we're seeing now is a stabilization of booking horizons, so growth in longer segments of over 60-89 days and +90 days and the decline in shorter segments, especially less than one week. There are some nuances depending on the region you are looking at, but broadly speaking this is reflective of the strong demand for travel.

### AMERICAS booking horizons 2019



### AMERICAS booking horizons 2022



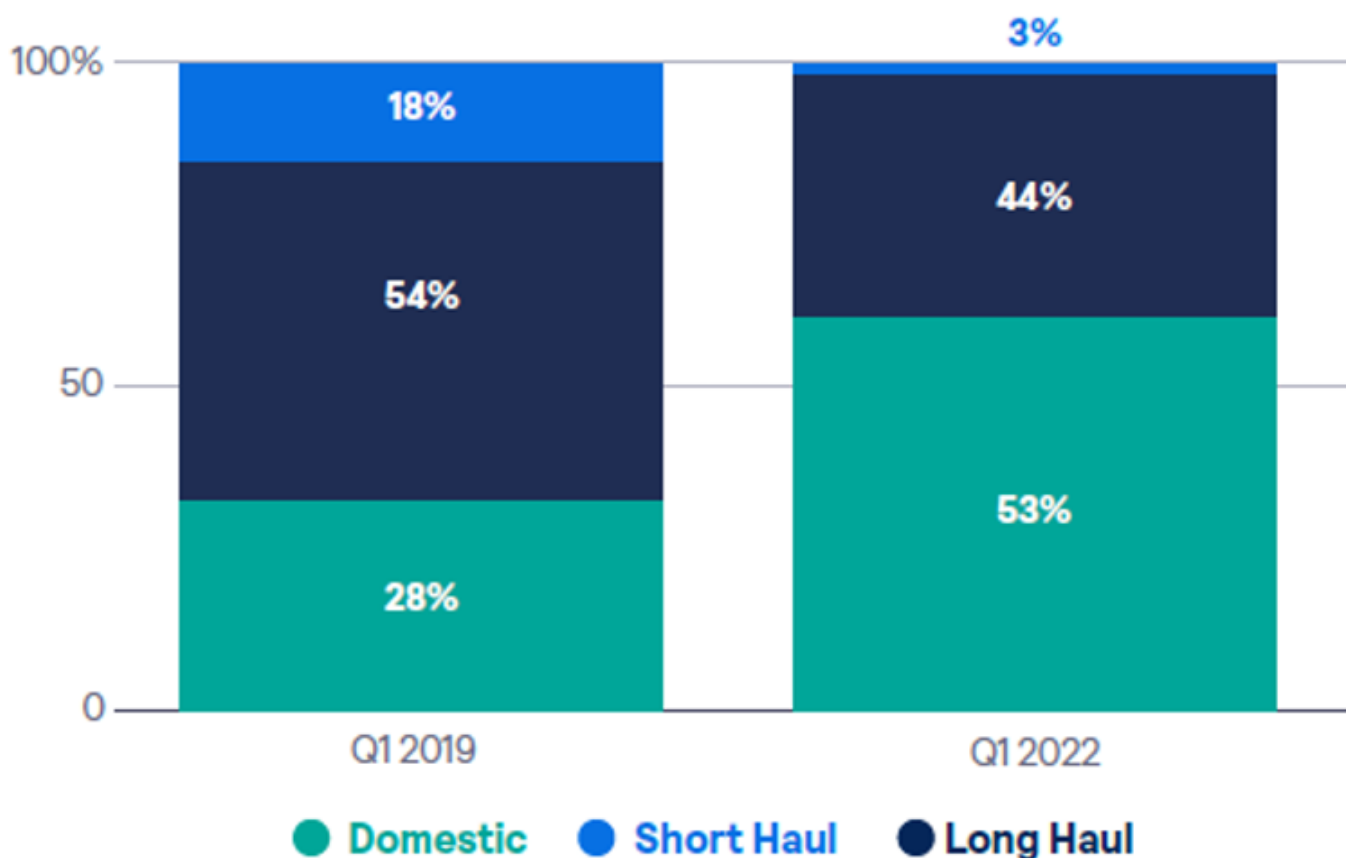
Source: Skyscanner Horizons report

### SR: WHAT IS THE DATA SHOWING US REGARDING THE CONTINUED POPULARITY OF DOMESTIC TRAVEL? ARE YOU SEEING A RETURN IN INTERNATIONAL TRAVEL, AND WHAT TYPE OF DESTINATIONS ARE MOST POPULAR?

Markets with large domestic markets such as the U.S., Brazil, India, and Australia continue to prove their resilience powered by demand for this itinerary type. We are also seeing a preference for short-haul travel in Europe, especially intra-European, with bookings increasing during Q1. Transatlantic and travel to the Middle East is also performing well, and we expect transatlantic to really accelerate once the testing requirement for the U.S. is dropped.

With the re-opening of countries in Asia Pacific, in particular popular pre-pandemic destinations in South-East Asia, we also expect long haul travel to make a comeback this year. We have seen a huge uptick in search volumes in APAC, with increases in outbound flight searches from Indonesia and Singapore of 150% and 135% respectively, over the period Jan-March 2022.

## APAC – haul type by year



Source: Skyscanner Horizons report

### SR: WITH PRICES FOR FLIGHTS HIGH AT THE MOMENT, DO YOU THINK THIS IS IMPACTING BOOKING BEHAVIOR?

HA: We continue to see latent demand coming back into the market – the desire to travel remains exceptionally strong despite higher airfares. Our audience is growing globally (now at over 75 million monthly unique users, up from 68 million in January) and traffic is approaching or even outpacing 2019 levels in some markets.

### SR: WE'VE HEARD FROM PLAYERS LIKE AIRBNB THAT PEOPLE ARE LOOKING FOR MORE INSPIRATION ON GOOD DESTINATIONS TO TRAVEL TO. HAVE YOU SEEN THIS?

HA: People are looking for inspiration. Approximately 35% of people coming to Skyscanner at the moment are using our 'Explore Everywhere' search feature.

### SR: DEMAND FOR VIRTUAL INTERLINING (WHERE CONSUMERS PICK TWO SEPARATE FLIGHTS TO GET TO THEIR DESTINATION) SPEAKS TO HOW AIRLINES ARE STRUGGLING TO REBUILD OPTIMAL ROUTE NETWORKS. WHAT ARE YOU SEEING IN YOUR DATA REGARDING THIS?

HA: Our data is showing that the share of virtual interlining itineraries selected by travelers on Skyscanner platforms remains higher than pre-Covid. This is likely due to airlines still working to restore their networks to full capacity. However, we are seeing that travelers are more open

to virtual interlining itineraries than before. At the same time there are some interesting industry developments including Low Cost Carrier to legacy carrier tie ups, as well as new codeshares.

**SR: WE KNOW YOU DON'T HAVE A CRYSTAL BALL, BUT HOW DO YOU THINK THE SECOND HALF OF 2022 WILL PAN OUT? WILL PRICES REMAIN HIGH, WILL RECOVERY CONTINUE?**

HA: Travelers will continue to drive demand and airlines will react accordingly. For example, airline networks are anywhere between 70-90% of pre-pandemic capacity depending on where you look. But their networks are different in many cases. New routes are opening, widebody jets are being used on domestic and short-haul routes and, in some cases, airlines are operating closer to their home markets. Airlines will continue to shift capacity based on two main factors: 1) where they can fly (based on crew, staffing and borders reopening) and 2) where there is demand (where traveler demand is outstripping planned capacity).

The key for the industry will be the continued re-opening of Asia Pacific as both a regional growth area and an inbound long-haul travel destination for Western business and leisure travelers. I know that this is top of mind for many airline executives.

Skyscanner's Horizons report can be [downloaded here](#).

# METHODOLOGY

## DATA PARTNERS

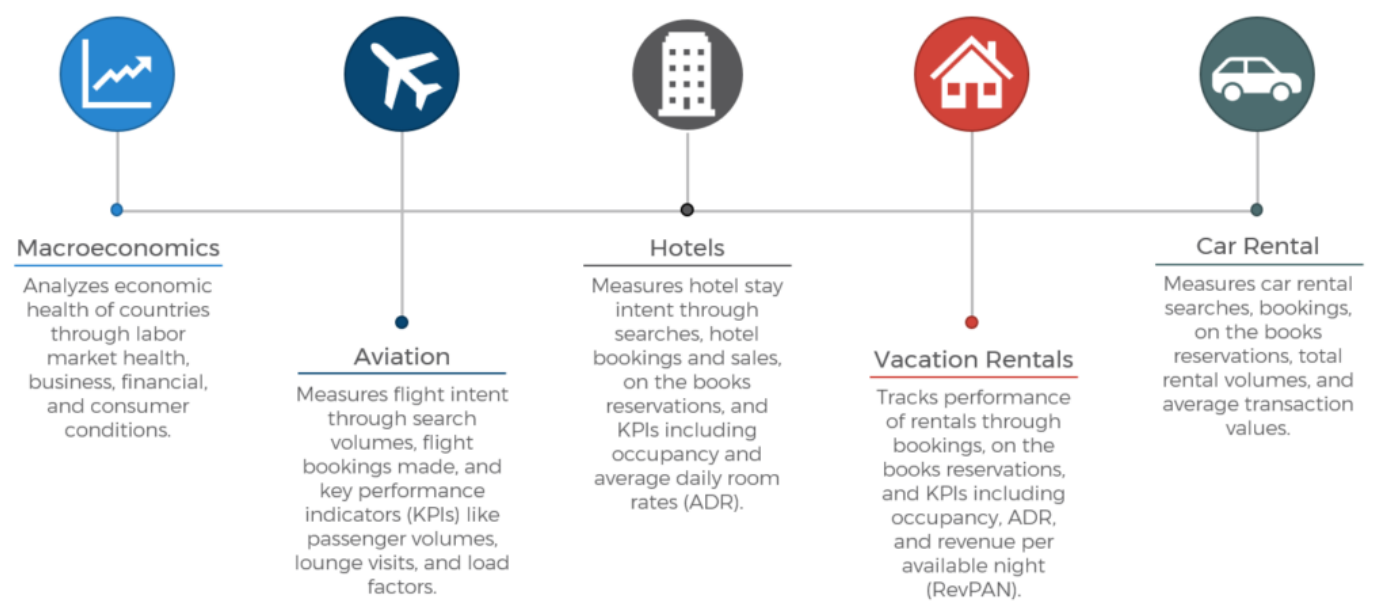
Skift Research collects and analyzes data from 20 different data partners, to provide the most comprehensive view of the travel industry's performance.



## INDEX DESIGN

The Index tracks 84 indicators per country to assess the health of the travel industry in each country. These indicators are aggregated into performance categories and sub-categories. The top level of division is by travel vertical, and each vertical is further divided by intent indicators, booking indicators, and key performance indicators.

The Index covers the following travel sectors:



## COUNTRY COVERAGE

The Index focuses on the travel performance in 22 of the largest tourism economies, combined accounting for 62% of inbound tourism receipts, 67% of outbound tourism expenditure, and 78% of global 2019 GDP.

- Argentina
- Australia
- Brazil
- Canada
- China
- France
- Germany
- Hong Kong, China
- India
- Indonesia
- Italy
- Japan
- Mexico
- Russia
- Singapore
- South Africa
- Spain
- Thailand
- Turkey
- U.S.
- United Arab Emirates
- United Kingdom

## INDEX SCORE CALCULATION

The Index is designed to provide an easy overview of the health of the travel industry. We have tracked the industry since the beginning of 2020. For 2020, 2021, and 2022 data, the

performance of each indicator is compared to the same time in 2019. The Index provides a score relative to a baseline reading of 100 for the same month in 2019.

The full methodology document can be found on our [website](#).

# DATA TABLES

## Total Skift Travel Health Index Scores by Country

	Sep 2021	Oct 2021	Nov 2021	Dec 2021	Jan 2022	Feb 2022	Mar 2022	Apr 2022
Argentina	51.1	60.8	71.6	72.2	63.3	80.0	85.2	98.9
Australia	33.3	38.4	53.6	61.2	59.8	73.5	85.5	91.0
Brazil	82.2	86.5	94.5	94.8	80.9	97.0	97.3	103.0
Canada	66.4	68.7	73.7	65.1	56.8	77.1	90.1	91.2
China	58.5	56.9	51.3	55.5	47.9	54.4	50.7	46.5
France	68.8	73.1	80.0	71.0	74.3	95.2	93.2	95.0
Germany	60.8	61.5	54.0	48.0	55.4	68.4	71.9	79.6
Hong Kong, China	30.0	30.0	31.0	32.2	28.6	33.9	33.5	33.0
India	58.6	68.2	68.8	67.7	55.7	77.0	85.8	94.5
Indonesia	30.5	35.7	37.1	43.2	52.8	53.2	64.4	71.4
Italy	62.3	66.1	67.7	59.8	62.7	79.6	85.2	92.2
Japan	29.2	33.5	34.4	38.7	43.4	41.9	47.2	48.8
Mexico	94.8	93.6	103.2	99.5	94.5	104.7	109.3	106.1
Russia	84.1	77.6	74.4	80.4	81.2	75.7	56.4	51.4
Singapore	25.3	29.2	32.9	36.5	46.1	58.0	66.4	76.7
South Africa	51.1	60.3	57.0	44.7	63.7	73.8	76.7	78.3
Spain	66.8	70.8	73.3	64.5	72.2	85.1	87.8	88.7
Thailand	22.7	28.4	32.1	35.9	45.2	51.1	60.3	70.7
Turkey	83.0	88.5	89.5	81.2	71.7	87.1	97.8	104.2
U.S.	80.2	83.5	87.0	85.5	79.9	95.7	97.8	99.3



	Sep 2021	Oct 2021	Nov 2021	Dec 2021	Jan 2022	Feb 2022	Mar 2022	Apr 2022
United Arab Emirates	72.0	84.2	85.8	80.0	78.5	98.1	97.5	100.4
United Kingdom	63.9	66.9	68.7	58.1	73.3	87.5	91.2	93.3

Aviation Scores by Country

	Sep 2021	Oct 2021	Nov 2021	Dec 2021	Jan 2022	Feb 2022	Mar 2022	Apr 2022
Argentina	45.1	52.4	58.9	60.4	52.8	63.1	68.4	69.4
Australia	26.5	30.0	42.2	54.5	48.3	64.0	80.8	85.0
Brazil	83.0	84.9	96.2	102.3	83.7	101.5	100.2	103.3
Canada	48.3	52.9	57.6	53.7	49.1	63.6	73.5	70.0
China	36.8	37.3	31.2	34.9	26.2	31.1	28.3	21.1
France	53.1	55.7	61.3	58.0	62.2	76.4	79.5	80.0
Germany	46.6	49.4	50.1	48.3	48.7	57.2	64.6	70.1
Hong Kong, China	11.4	10.6	12.5	13.4	8.0	8.1	9.8	8.9
India	44.7	50.5	57.6	54.9	59.7	76.2	87.2	89.1
Indonesia	17.8	19.6	19.9	23.5	25.9	27.6	38.7	42.9
Italy	53.0	58.1	57.5	54.3	62.1	77.8	85.2	96.2
Japan	20.3	25.1	28.2	30.2	26.2	26.6	33.4	34.1
Mexico	75.6	78.7	83.2	81.7	89.8	95.7	98.5	92.4
Russia	84.7	81.8	81.2	87.6	87.3	84.9	65.0	54.8
Singapore	12.3	16.3	22.8	27.0	22.9	29.3	41.1	47.4
South Africa	41.2	48.4	53.0	44.9	56.2	64.2	69.5	66.9
Spain	62.4	66.5	68.2	65.0	73.1	85.8	88.8	91.6
Thailand	12.2	15.2	22.0	25.6	28.4	33.4	40.6	44.2

	Sep 2021	Oct 2021	Nov 2021	Dec 2021	Jan 2022	Feb 2022	Mar 2022	Apr 2022
Turkey	80.0	85.1	86.3	84.6	79.1	87.0	87.9	97.8
U.S.	71.2	77.0	80.0	77.0	69.5	81.2	86.3	84.5
United Arab Emirates	51.4	63.6	68.1	65.5	69.3	83.0	85.6	82.4
United Kingdom	43.3	50.8	55.6	50.5	62.1	76.5	82.1	82.3

Aviation contributes 37.5% to the total score. The scores in this table have been indexed to give a better insight into performance. 100 = pre-pandemic level.

### Hotel Scores by Country

	Sep 2021	Oct 2021	Nov 2021	Dec 2021	Jan 2022	Feb 2022	Mar 2022	Apr 2022
Argentina	45.2	57.1	72.1	72.7	67.3	76.1	96.6	123.0
Australia	25.6	32.9	48.9	54.4	52.8	65.5	81.2	87.4
Brazil	80.7	91.4	101.0	96.4	78.2	91.5	95.7	107.3
Canada	71.2	70.5	77.9	63.7	54.3	71.2	94.9	103.3
China	72.3	67.6	57.7	61.4	52.4	64.6	46.0	44.8
France	70.9	73.1	76.8	57.4	66.6	85.2	92.4	101.4
Germany	65.9	64.5	50.7	35.1	47.7	63.4	73.2	87.4
Hong Kong, China	41.9	42.8	44.2	42.7	36.9	49.7	38.0	41.3
India	72.1	87.1	84.8	83.5	47.5	81.2	94.2	113.5
Indonesia	39.4	48.7	53.0	61.9	72.2	64.7	89.8	101.9
Italy	59.7	64.2	65.6	50.1	55.7	76.8	86.3	94.3
Japan	29.1	34.1	32.1	35.6	64.7	58.9	61.0	62.6
Mexico	91.5	96.7	107.4	96.3	89.7	105.8	123.9	129.1
Russia	88.2	74.3	66.8	74.3	74.7	66.3	21.8	20.1

	Sep 2021	Oct 2021	Nov 2021	Dec 2021	Jan 2022	Feb 2022	Mar 2022	Apr 2022
Singapore	29.2	33.5	36.5	39.1	58.1	76.8	93.2	108.1
South Africa	46.8	62.3	52.1	26.8	65.2	77.0	78.8	87.5
Spain	65.8	71.2	72.2	53.6	57.6	74.6	83.5	87.8
Thailand	25.0	35.8	40.2	41.1	58.2	62.1	76.9	101.6
Turkey	94.0	100.4	98.9	81.7	63.8	91.7	118.7	127.7
U.S.	77.4	81.4	87.6	85.9	79.2	95.0	102.3	109.9
United Arab Emirates	93.3	107.1	107.2	95.7	68.1	93.5	99.1	111.6
United Kingdom	70.4	71.3	72.1	54.2	61.0	78.9	89.2	97.3

Hotels contributes 32.5% to the total score. The scores in this table have been indexed to give a better insight into performance. 100 = pre-pandemic level.

### Vacation Rental Scores by Country

	Sep 2021	Oct 2021	Nov 2021	Dec 2021	Jan 2022	Feb 2022	Mar 2022	Apr 2022
Argentina					118.8	133.8	139.1	141.8
Australia	64.5	72.7	104.1	106.8	140.8	137.8	128.9	131.9
Brazil	84.5	79.9	74.4	70.7	114.0	116.9	113.2	114.9
Canada	95.9	100.5	102.3	93.0	103.1	111.6	123.4	120.2
China	99.3	98.1	109.9	124.1	119.9	117.0	116.2	114.7
France	99.0	114.0	132.2	124.7	106.1	139.4	129.5	120.1
Germany	81.4	85.0	70.4	75.1	97.3	97.8	94.5	95.4
Hong Kong, China	42.5	43.2	37.1	51.5	62.6	57.3	57.5	55.6
India	63.7	76.3	69.1	75.3	96.6	94.2	99.9	103.2
Indonesia	31.1	40.2	34.4	45.1	120.0	97.8	73.7	76.0

	Sep 2021	Oct 2021	Nov 2021	Dec 2021	Jan 2022	Feb 2022	Mar 2022	Apr 2022
Italy	81.1	83.9	90.0	83.8	108.9	109.2	114.7	104.7
Japan	35.2	38.8	40.4	55.7	65.6	57.9	57.1	56.4
Mexico	168.2	138.1	159.8	166.2	132.5	134.0	135.7	122.4
Russia	68.1	69.7	68.9	73.5	111.1	92.6	118.8	112.4
Singapore	39.1	46.2	41.8	48.7	100.9	93.9	89.1	83.3
South Africa	77.6	84.1	73.4	72.9	84.9	92.6	98.4	101.1
Spain	72.8	79.0	85.0	81.4	120.0	120.1	131.9	110.1
Thailand	33.6	38.3	30.7	45.8	84.6	78.7	80.9	82.8
Turkey	58.0	69.8	75.3	66.1	101.9	99.7	110.3	107.1
U.S.	119.1	115.0	114.3	112.3	120.3	119.1	116.4	113.1
United Arab Emirates	77.9	92.0	84.1	80.0	123.8	126.2	131.6	123.7
United Kingdom	123.2	122.5	117.8	109.2	134.0	132.2	132.5	135.7

Vacation Rentals contributes 10% to the total score. The scores in this table have been indexed to give a better insight into performance. 100 = pre-pandemic level. 2021 VR data for Argentina missing.

## Car Rental Scores by Country

	Sep 2021	Oct 2021	Nov 2021	Dec 2021	Jan 2022	Feb 2022	Mar 2022	Apr 2022
Argentina	72.0	61.3	72.0	72.0	73.8	112.2	103.7	115.2
Australia	32.0	26.7	29.3	29.3	65.2	86.3	93.1	104.0
Brazil	72.0	61.3	72.0	72.0	92.2	110.5	105.0	109.0
Canada	61.3	53.3	53.3	53.3	75.4	110.0	112.5	116.6
China	32.0	26.7	29.3	29.3	29.4	41.9	52.8	52.7
France	72.0	61.3	72.0	72.0	115.1	150.2	120.1	117.9

	Sep 2021	Oct 2021	Nov 2021	Dec 2021	Jan 2022	Feb 2022	Mar 2022	Apr 2022
Germany	69.3	53.3	48.0	48.0	66.4	88.2	80.2	83.1
Hong Kong, China	31.0	25.7	28.8	28.8	36.1	46.5	55.7	58.0
India	31.0	25.7	28.8	28.8	41.4	61.5	69.8	78.8
Indonesia	31.0	25.7	28.8	28.8	41.4	61.5	69.8	78.8
Italy	71.7	62.2	72.2	72.2	61.7	80.3	74.9	77.2
Japan	31.0	25.7	28.8	28.8	39.6	46.6	61.1	67.0
Mexico	71.7	62.2	72.2	72.2	118.8	128.9	115.8	114.6
Russia	61.1	52.2	53.8	53.8	74.6	74.6	74.6	74.6
Singapore	31.0	25.7	28.8	28.8	56.7	78.3	90.0	115.3
South Africa	61.1	52.2	53.8	53.8	81.1	110.0	96.0	92.5
Spain	71.7	62.2	72.2	72.2	74.2	91.7	77.9	79.1
Thailand	31.0	25.7	28.8	28.8	55.6	73.2	74.5	80.2
Turkey	71.7	62.2	72.2	72.2	74.7	92.6	84.5	90.3
U.S.	72.8	67.1	66.8	66.8	93.0	123.5	111.3	111.1
United Arab Emirates	61.1	52.2	53.8	53.8	102.5	137.5	111.2	117.2
United Kingdom	68.8	53.8	47.5	47.5	94.2	115.3	103.4	100.0

*Car Rental contributes 15% to the total score. The scores in this table have been indexed to give a better insight into performance. 100 = pre-pandemic level.*

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