



# SKIFT TRAVEL HEALTH INDEX

## JUNE 2022 HIGHLIGHTS

### SKIFT RESEARCH TAKE

China is finally starting to recover, after months of decline amid renewed lockdowns. The overall Index dropped for the first time in 2022 though, as the mess at airports and airlines is catching up with the industry.

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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 June 2022.

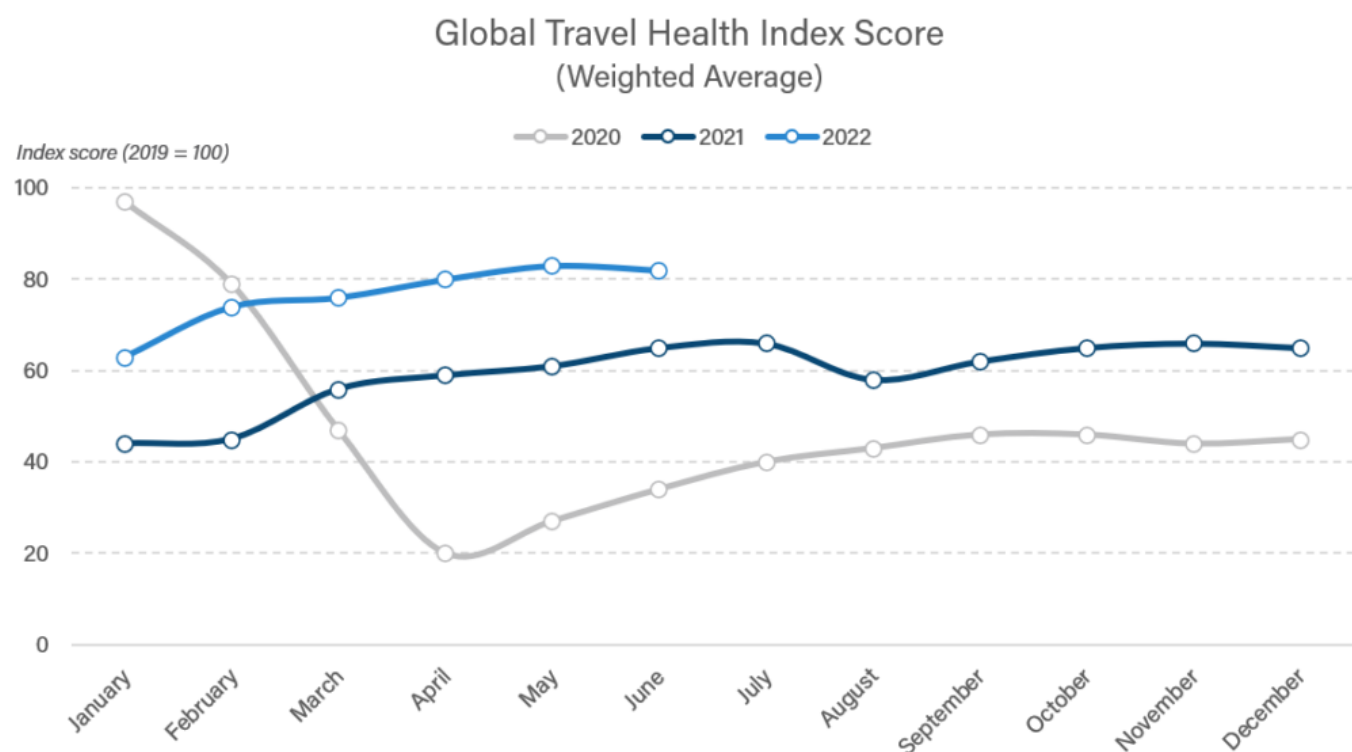
The Skift Travel Health Index is a real-time measure of the performance of the travel industry at large, and the core verticals within it. The Index provides the travel industry with a powerful tool for strategic planning, which is of utmost importance as times remain uncertain.

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.

# FIRST DECLINE IN INDEX SINCE START OF 2022

During June 2022, the Skift Travel Health Index dropped one point compared to the previous month. It is the first time since January 2022 that the Index registered a decline, and although small, it is significant in what it implies. Economic worries, mass cancellations at airports, and price hikes seem to be catching up with the industry.



Source: Skift Research from partner data. All data vs same month in 2019.

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We are seeing a weakening of the performance in all regions, with the exception of Asia Pacific, although the latter still has some catching up to do and continues to have the lowest overall score.

	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	May-June change
Asia Pacific	50	58	59	63	66	69	+3 pp
Europe	68	84	85	90	99	91	-8 pp
Latin America	82	96	98	106	104	99	-5 pp
Middle East and Africa	73	88	94	91	99	95	-4 pp

	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	May-June change
North America	83	96	98	103	103	97	-6 pp
Global average	63	74	76	80	83	82	-1 pp

# CHINA ON THE WAY UP

China is finally showing an increase in performance again, after months of decline and stagnation due to continued Covid-induced lockdowns. The country continues to hold on to its closed-border approach, but domestic travel is picking up as internal curbs are relaxed. By the end of June, there were rumblings that travel restrictions would be lifted, which had an immediate effect on travel searches.

[The Business Standard](#) reported that online searches for Chinese airline tickets on domestic and international routes surged following the news that Covid-19 quarantine requirements would be slashed. Online travel agency Qunar reported searches for air tickets rose 60% and doubled for hotels in the 30 minutes after the announcement. Another OTA, Ly.com, saw a similar rise, with a particular interest for tickets to China by consumers in Japan, Singapore, and South Korea.

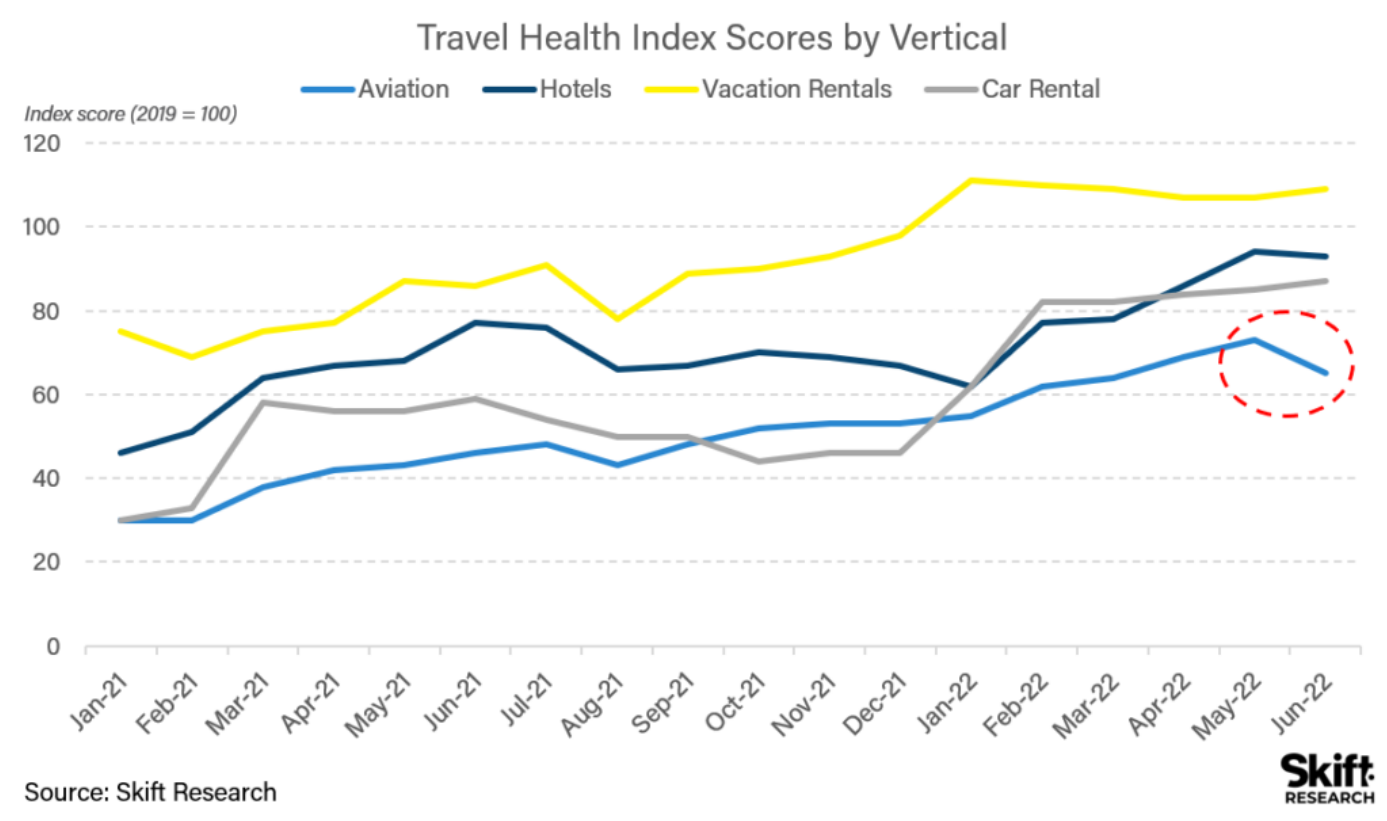
As reported in the [Daily Lodging Report](#), however, during a recent visit to Wuhan, President Xi declared Covid Zero the most “economic and effective” policy for China, casting the strategy as proof of the superiority of the country’s political system. Xi said relaxing Covid controls would risk too many lives, and China would rather endure some temporary impact on economic development than let the virus hurt people’s safety and health. Don’t expect a flood of Chinese tourists just yet.

Country	May 2022 score	June 2022 score	MoM Growth (abs)	MoM Growth (%)	YoY Growth (%)
China	49.5	59.3	9.8	19.8%	-13%
Australia	91.6	97.3	5.7	6.2%	71%
South Africa	81.2	86	4.8	5.9%	73%
Russia	52.8	53.8	1.0	1.9%	-31%
Canada	97.3	99.1	1.8	1.8%	100%
Argentina	97.8	97	-0.8	-0.8%	161%
Thailand	81.7	80.2	-1.5	-1.8%	236%
Turkey	114	111.4	-2.6	-2.3%	61%
Japan	60	58.2	-1.8	-3.0%	94%
Mexico	111.2	106.3	-4.9	-4.4%	5%
Hong Kong, China	38	36.3	-1.7	-4.5%	35%

Country	May 2022 score	June 2022 score	MoM Growth (abs)	MoM Growth (%)	YoY Growth (%)
Indonesia	85.7	81.3	-4.4	-5.1%	131%
Germany	94.2	88.7	-5.5	-5.8%	71%
U.S.	104.2	97.6	-6.6	-6.3%	4%
Singapore	85.5	79.1	-6.4	-7.5%	200%
Brazil	104	96.2	-7.8	-7.5%	41%
India	102.6	94.2	-8.4	-8.2%	132%
United Kingdom	102.5	94	-8.5	-8.3%	86%
Italy	107.5	97.9	-9.6	-8.9%	80%
United Arab Emirates	111.9	101	-10.9	-9.7%	57%
France	108.7	96.9	-11.8	-10.9%	69%
Spain	103.7	89.9	-13.8	-13.3%	55%

# AIRPORT WOES HURT RECOVERY

The declining performance comes predominantly from the aviation sector, which has been hit by major staff shortages, especially at airports, resulting in high levels of forced flight cancellations.



Data from OAG shows how scheduled seats in airplanes have dropped in almost all countries. Comparing data for seat capacity in July 2022, as extracted on June 5 and July 3, shows that there are large amounts of seats scrapped. In Asia there still is lingering uncertainty about travel requirements, while in Europe airports have been unable to process the passenger and baggage flows.

## DIFFERENCE IN SCHEDULED SEATS FOR JULY 2022, AS SCHEDULED ON JUNE 5 VS JULY 3

	June-July diff	% of total seats
Thailand	-903,760	-20%
South Africa	-321,151	-19%
India	-2,666,739	-16%
Argentina	-152,366	-9%
China	-4,488,662	-6%

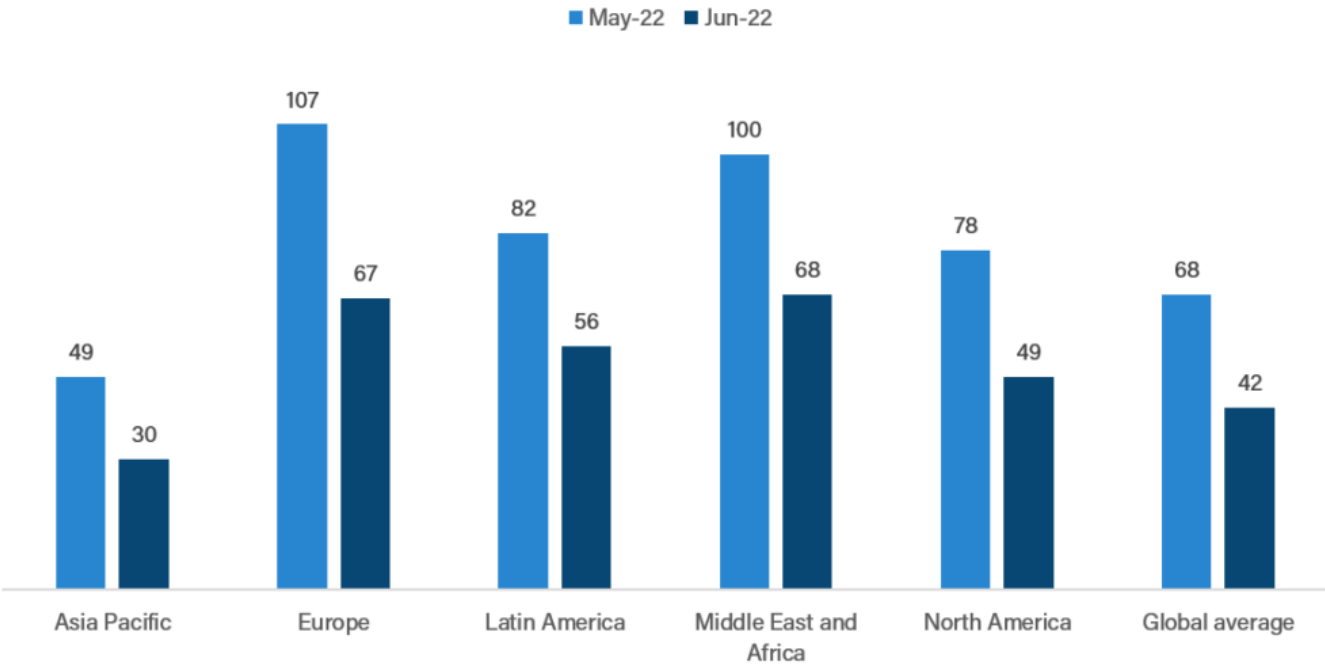


	June-July diff	% of total seats
Germany	-611,182	-5%
UK	-646,882	-4%
Japan	-563,941	-4%
Mexico	-382,554	-4%
Australia	-273,552	-4%
Canada	-260,756	-3%
Singapore	-60,332	-3%
Indonesia	-287,396	-3%
Italy	-327,747	-3%
Turkey	-238,598	-2%
Brazil	-225,574	-2%
France	-198,341	-2%
Spain	-204,817	-1%
U.S.	-753,088	-1%
Russia	-79,337	-1%
UAE	38,311	1%
Hong Kong	84,084	13%

Source: OAG

Flight search data from Amadeus, Skyscanner, and Sojern, however, shows that the bad press is also having an impact on flight intent. Searches dropped considerably, with our score for flight searches (which combines the performance as reported by the three data partners) dropping from 68 percentage points globally in May to 42 percentage points in June compared to 2019 levels. Europe dropped a full 40 percentage points from 107 (indicating that flight searches in May 2022 were higher than in May 2019) to 67.

Flight Search Performance - May-June 2022

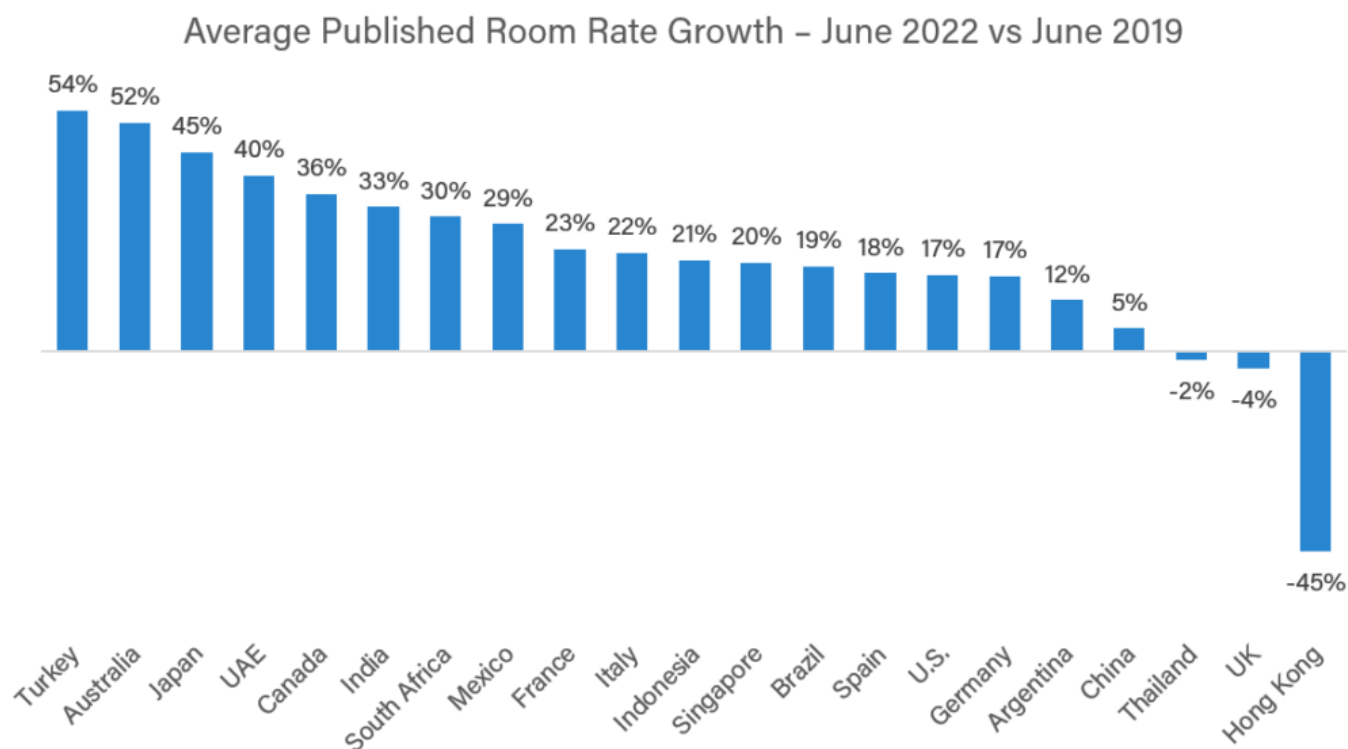


Source: Skift Research from Amadeus, Skyscanner, and Sojern



# HIGH PRICES DRIVEN BY HIGH INFLATION

While the industry is struggling to cater to pent-up demand, we continue to see that prices are high. In the hotel industry, data from OTA Insight shows that almost every country is seeing hotel room prices significantly higher now than in 2019.



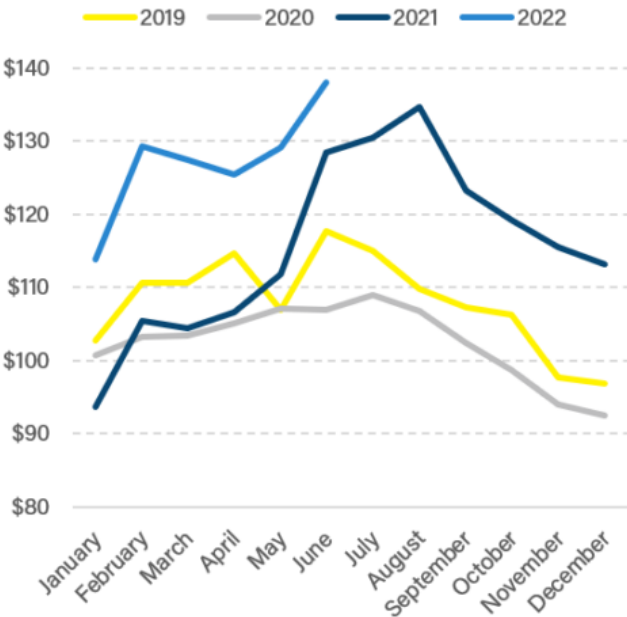
Source: OTA Insight

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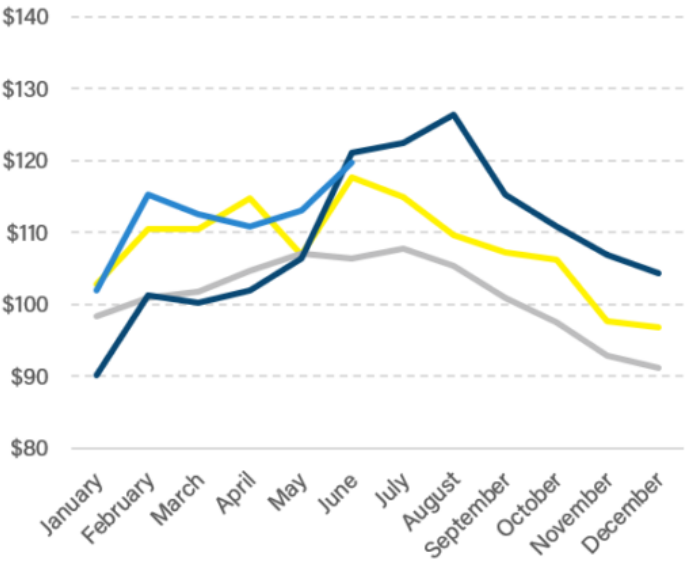
We have been reporting on these high prices for a few months now, and want to dive a little deeper. These high prices come in conjunction with high inflation, so we used the pricing data and adjusted this using the Consumer Price Index for the U.S. and Europe to get an insight into how real prices are developing.

Interestingly, for both the U.S. and Europe, hotel room prices once adjusted for inflation are tracking at around the same value as 2019 prices. The financials of running a hotel involve a combination of prices and occupancy levels, and pricing alone does not provide the full picture, but the high rates might not translate into more cash in the hoteliers' pockets. Given that labor prices as well as the Producer Price Index (PPI), which impacts the supply chain of hotels, are also rising next to the CPI, it's unlikely that the high rates will translate into higher profits to recuperate some of the lost incomes from the past two years for hoteliers. As economists seem to agree that inflation will continue to increase this year, it is unlikely that prices for travel products will drop.

Published Rates for U.S. Hotel Rooms



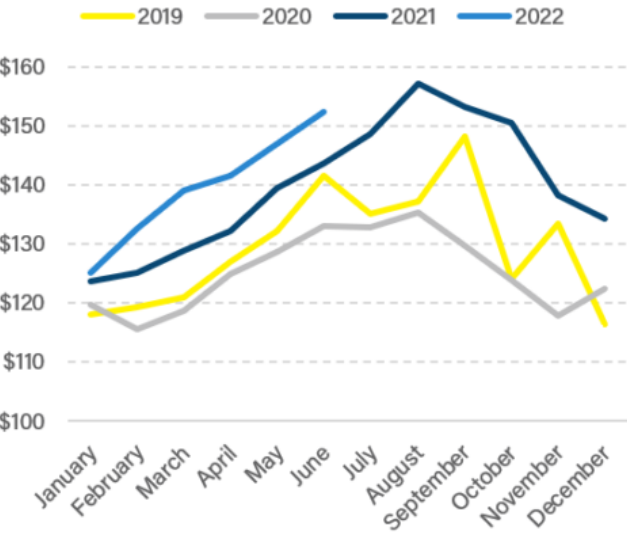
Real Published Rates for U.S. Hotel Rooms  
(Adjusted to 2019)



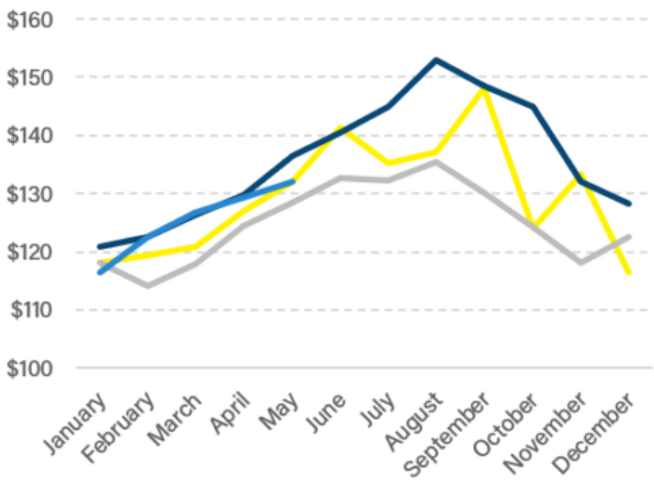
Source: Skift Research from OTA Insight, FRED. Data as of July 2022.  
Real rates are adjusted for inflation using the Consumer Price Index.



Published Rates for European Hotel Rooms



Real Published Rates for European Hotel Rooms  
(Adjusted to 2019)



Source: Skift Research from OTA Insight, ECB. Data as of July 2022.  
Real rates are adjusted for inflation using the Consumer Price Index for EU27. European hotel prices based on rates in France, Germany, Italy, Spain, and UK. Local currency converted to U.S. dollars using current exchange rates.



# METHODOLOGY

## DATA PARTNERS

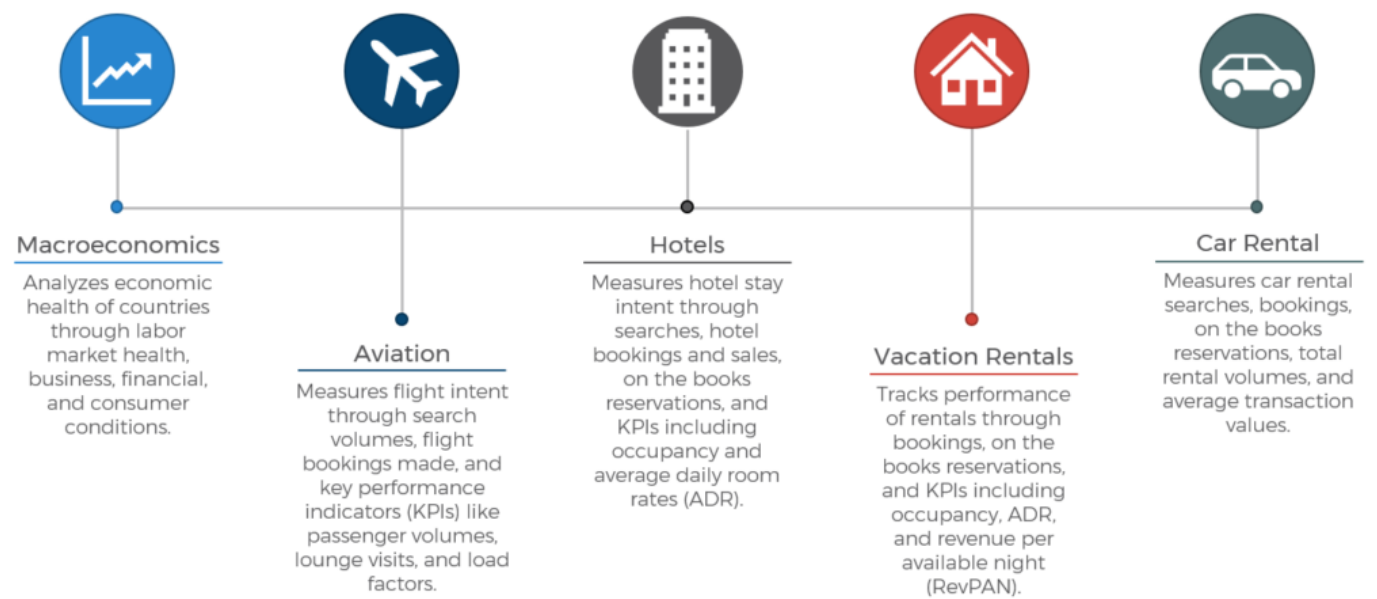
Skift Research collects and analyzes data from 20 different data partners, to provide the most comprehensive view of the travel industry's performance.



## 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 can be found on our [website](#).

# DATA TABLES

## Total Skift Travel Health Index Scores by Country

	<b>Nov 2021</b>	<b>Dec 2021</b>	<b>Jan 2022</b>	<b>Feb 2022</b>	<b>Mar 2022</b>	<b>Apr 2022</b>	<b>May 2022</b>	<b>Jun 2022</b>
Argentina	71.6	72.2	65.5	80.3	85.2	99.1	97.8	97.0
Australia	53.6	61.2	60.2	73.5	88.9	97.1	91.6	97.3
Brazil	94.5	94.8	85.0	98.1	99.6	108.6	104.0	96.2
Canada	73.7	65.1	60.4	77.7	95.4	93.6	97.3	99.1
China	51.3	55.5	49.7	54.0	50.1	50.1	49.5	59.3
France	80.0	71.0	71.0	95.2	94.4	98.3	108.7	96.9
Germany	54.0	48.0	56.0	78.1	78.9	82.8	94.2	88.7
Hong Kong, China	31.0	32.2	28.6	35.7	33.4	33.8	38.0	36.3
India	68.8	67.7	55.7	79.4	85.9	95.4	102.6	94.2
Indonesia	37.1	43.2	52.8	56.9	64.9	72.6	85.7	81.3
Italy	67.7	59.8	66.2	79.7	88.7	100.7	107.5	97.9
Japan	34.4	38.7	48.2	41.8	47.1	52.5	60.0	58.2
Mexico	103.2	99.5	95.0	106.6	109.1	109.1	111.2	106.3
Russia	74.4	80.4	81.2	75.6	49.8	52.6	52.8	53.8
Singapore	32.9	36.5	46.1	58.7	68.0	78.2	85.5	79.1
South Africa	57.0	44.7	63.9	74.0	88.8	79.7	81.2	86.0
Spain	73.3	64.5	73.7	86.0	88.5	94.7	103.7	89.9
Thailand	32.1	35.9	45.2	51.7	59.7	71.7	81.7	80.2
Turkey	89.5	81.2	69.4	87.1	97.6	96.0	114.0	111.4
U.S.	87.0	85.5	84.2	97.6	98.7	104.0	104.2	97.6



	<b>Nov 2021</b>	<b>Dec 2021</b>	<b>Jan 2022</b>	<b>Feb 2022</b>	<b>Mar 2022</b>	<b>Apr 2022</b>	<b>May 2022</b>	<b>Jun 2022</b>
United Arab Emirates	85.8	80.0	79.0	98.7	97.7	99.9	111.9	101.0
United Kingdom	68.7	58.1	73.6	87.6	92.4	96.3	102.5	94.0

### Aviation Scores by Country

	<b>Nov 2021</b>	<b>Dec 2021</b>	<b>Jan 2022</b>	<b>Feb 2022</b>	<b>Mar 2022</b>	<b>Apr 2022</b>	<b>May 2022</b>	<b>Jun 2022</b>
Argentina	58.9	60.4	58.5	64.0	68.6	70.9	74.4	71.2
Australia	42.2	54.5	49.2	64.0	88.8	97.5	80.6	91.3
Brazil	96.2	102.3	94.7	104.5	106.2	117.9	109.6	87.0
Canada	57.6	53.7	58.1	64.8	88.5	75.4	81.3	85.3
China	31.2	34.9	31.0	30.0	26.8	31.2	27.0	29.9
France	61.3	58.0	53.4	76.4	82.3	83.4	98.1	82.6
Germany	50.1	48.3	48.7	80.8	81.9	74.7	95.3	86.8
Hong Kong, China	12.5	13.4	8.0	12.7	10.0	12.0	11.0	13.0
India	57.6	54.9	59.7	82.5	87.8	92.4	102.4	77.4
Indonesia	19.9	23.5	25.9	37.4	40.2	47.1	60.7	52.2
Italy	57.5	54.3	71.2	77.7	93.3	112.0	110.8	101.3
Japan	28.2	30.2	39.2	26.5	33.0	43.8	41.8	40.6
Mexico	83.2	81.7	91.6	101.1	98.1	100.2	107.0	91.9
Russia	81.2	87.6	87.3	84.6	64.8	59.7	59.6	74.9
Singapore	22.8	27.0	22.9	31.6	46.0	52.8	63.6	58.3
South Africa	53.0	44.9	56.2	64.2	101.4	71.6	75.3	90.8
Spain	68.2	65.0	77.1	87.8	88.8	101.2	118.5	94.0
Thailand	22.0	25.6	28.4	35.1	38.9	47.2	55.8	53.9

	<b>Nov 2021</b>	<b>Dec 2021</b>	<b>Jan 2022</b>	<b>Feb 2022</b>	<b>Mar 2022</b>	<b>Apr 2022</b>	<b>May 2022</b>	<b>Jun 2022</b>
Turkey	86.3	84.6	72.8	87.0	87.5	80.9	117.8	101.3
U.S.	80.0	77.0	81.2	86.6	88.5	95.4	98.9	85.4
United Arab Emirates	68.1	65.5	70.5	84.1	85.5	83.1	97.0	92.9
United Kingdom	55.6	50.5	62.8	76.5	84.6	87.4	97.4	81.3

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

	<b>Nov 2021</b>	<b>Dec 2021</b>	<b>Jan 2022</b>	<b>Feb 2022</b>	<b>Mar 2022</b>	<b>Apr 2022</b>	<b>May 2022</b>	<b>Jun 2022</b>
Argentina	72.1	72.7	67.3	76.1	96.6	123.1	115.4	118.0
Australia	48.9	54.4	53.0	66.1	81.7	91.1	94.7	96.3
Brazil	101.0	96.4	78.2	91.4	95.7	107.4	105.9	109.9
Canada	77.9	63.7	54.4	71.3	95.3	105.3	109.6	109.5
China	57.7	61.4	52.4	64.6	46.4	44.5	55.7	70.0
France	76.8	57.4	66.8	85.5	93.2	107.6	116.5	110.4
Germany	50.7	35.1	47.8	63.6	73.9	91.4	99.0	96.3
Hong Kong, China	44.2	42.7	36.9	49.9	37.5	40.2	49.3	35.5
India	84.8	83.5	47.5	81.2	94.2	113.8	126.0	120.6
Indonesia	53.0	61.9	72.2	64.7	89.8	101.7	121.1	114.3
Italy	65.6	50.1	55.8	77.2	87.3	101.4	116.9	102.9
Japan	32.1	35.6	64.7	58.9	61.0	62.8	78.2	72.2
Mexico	107.4	96.3	89.6	105.7	123.8	129.8	129.6	127.1
Russia	66.8	74.3	74.8	66.2	1.5	18.3	22.0	10.3

	<b>Nov 2021</b>	<b>Dec 2021</b>	<b>Jan 2022</b>	<b>Feb 2022</b>	<b>Mar 2022</b>	<b>Apr 2022</b>	<b>May 2022</b>	<b>Jun 2022</b>
Singapore	36.5	39.1	58.1	76.4	91.6	104.5	106.4	93.1
South Africa	52.1	26.8	65.2	77.0	78.8	86.2	82.9	83.3
Spain	72.2	53.6	57.7	75.0	84.4	95.1	102.4	90.1
Thailand	40.2	41.1	58.2	62.1	76.9	101.3	116.9	110.1
Turkey	98.9	81.7	63.8	91.7	118.7	123.8	138.2	147.0
U.S.	87.6	85.9	79.2	95.1	102.6	111.9	114.5	104.7
United Arab Emirates	107.2	95.7	68.2	94.0	100.3	110.8	129.5	102.5
United Kingdom	72.1	54.2	61.2	79.3	89.8	99.5	104.9	101.5

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

	<b>Nov 2021</b>	<b>Dec 2021</b>	<b>Jan 2022</b>	<b>Feb 2022</b>	<b>Mar 2022</b>	<b>Apr 2022</b>	<b>May 2022</b>	<b>Jun 2022</b>
Argentina			118.8	133.8	138.8	138.8	137.7	138.5
Australia	104.1	106.8	140.8	135.6	131.1	134.0	129.9	132.8
Brazil	74.4	70.7	114.0	116.9	113.7	115.2	108.9	104.7
Canada	102.3	93.0	104.1	112.5	124.5	122.4	122.3	123.4
China	109.9	124.1	119.9	117.0	115.0	113.9	119.9	124.4
France	132.2	124.7	105.4	138.7	128.7	119.9	127.9	125.9
Germany	70.4	75.1	102.4	105.2	96.9	96.6	101.2	102.7
Hong Kong, China	37.1	51.5	62.6	57.3	57.1	55.5	59.5	64.8
India	69.1	75.3	96.6	94.2	98.1	99.2	100.1	101.1
Indonesia	34.4	45.1	120.0	97.8	73.4	72.7	82.5	78.8

	<b>Nov 2021</b>	<b>Dec 2021</b>	<b>Jan 2022</b>	<b>Feb 2022</b>	<b>Mar 2022</b>	<b>Apr 2022</b>	<b>May 2022</b>	<b>Jun 2022</b>
Italy	90.0	83.8	109.5	109.0	115.2	107.8	120.2	120.0
Japan	40.4	55.7	65.6	57.8	57.4	56.3	59.9	60.0
Mexico	159.8	166.2	131.2	132.8	135.0	120.7	120.0	121.5
Russia	68.9	73.5	111.1	92.6	119.2	111.7	101.9	93.2
Singapore	41.8	48.7	100.9	93.9	91.9	89.3	88.3	87.7
South Africa	73.4	72.9	87.3	94.4	99.4	101.7	100.5	93.9
Spain	85.0	81.4	119.6	119.5	131.0	110.3	105.6	108.2
Thailand	30.7	45.8	84.6	78.7	80.9	82.2	83.9	85.8
Turkey	75.3	66.1	101.9	99.7	109.3	101.7	104.6	93.7
U.S.	114.3	112.3	120.0	118.4	115.2	112.7	105.3	110.8
United Arab Emirates	84.1	80.0	123.8	126.2	130.2	118.4	126.0	118.9
United Kingdom	117.8	109.2	133.9	132.1	133.4	139.6	134.5	130.2

*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

	<b>Nov 2021</b>	<b>Dec 2021</b>	<b>Jan 2022</b>	<b>Feb 2022</b>	<b>Mar 2022</b>	<b>Apr 2022</b>	<b>May 2022</b>	<b>Jun 2022</b>
Argentina	72.0	72.0	73.8	112.2	103.7	115.2	114.6	111.4
Australia	29.3	29.3	65.2	86.3	93.1	104.0	106.7	109.8
Brazil	72.0	72.0	92.2	110.5	105.0	109.0	111.3	109.8
Canada	53.3	53.3	75.4	110.0	112.5	116.6	117.3	115.4
China	29.3	29.3	29.4	41.9	52.8	52.7	43.1	48.5
France	72.0	72.0	115.1	150.2	120.1	117.9	117.0	103.2

	<b>Nov 2021</b>	<b>Dec 2021</b>	<b>Jan 2022</b>	<b>Feb 2022</b>	<b>Mar 2022</b>	<b>Apr 2022</b>	<b>May 2022</b>	<b>Jun 2022</b>
Germany	48.0	48.0	66.4	88.2	80.2	83.1	85.5	81.2
Hong Kong, China	28.8	28.8	36.1	46.5	55.7	58.0	66.0	76.2
India	28.8	28.8	41.4	61.5	69.8	78.8	83.5	92.5
Indonesia	28.8	28.8	41.4	61.5	69.8	78.8	83.5	92.5
Italy	72.2	72.2	61.7	80.3	74.9	77.2	80.0	79.3
Japan	28.8	28.8	39.6	46.6	61.1	67.0	86.0	90.2
Mexico	72.2	72.2	118.8	128.9	115.8	114.6	119.7	115.2
Russia	53.8	53.8	74.6	74.6	74.6	74.6	74.6	74.6
Singapore	28.8	28.8	56.7	78.3	90.0	115.3	114.9	114.8
South Africa	53.8	53.8	81.1	110.0	96.0	92.5	95.1	97.9
Spain	72.2	72.2	74.2	91.7	77.9	79.1	83.2	83.2
Thailand	28.8	28.8	55.6	73.2	74.5	80.2	85.4	93.7
Turkey	72.2	72.2	74.7	92.6	84.5	90.3	78.7	84.7
U.S.	66.8	66.8	93.0	123.5	111.3	111.1	115.2	113.4
United Arab Emirates	53.8	53.8	102.5	137.5	111.2	117.2	116.9	117.9
United Kingdom	47.5	47.5	94.2	115.3	103.4	100.0	102.0	101.7

*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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