Skift Travel Health Index
November 2023 Highlights

The global Travel Health Index rose to 105, continuing the trend of surpassing pre-pandemic levels and setting a new benchmark. Latin America, propelled by the Taylor Swift Eras Tour led the score, soaring to an all-time high regional index of 117 in November 2023.

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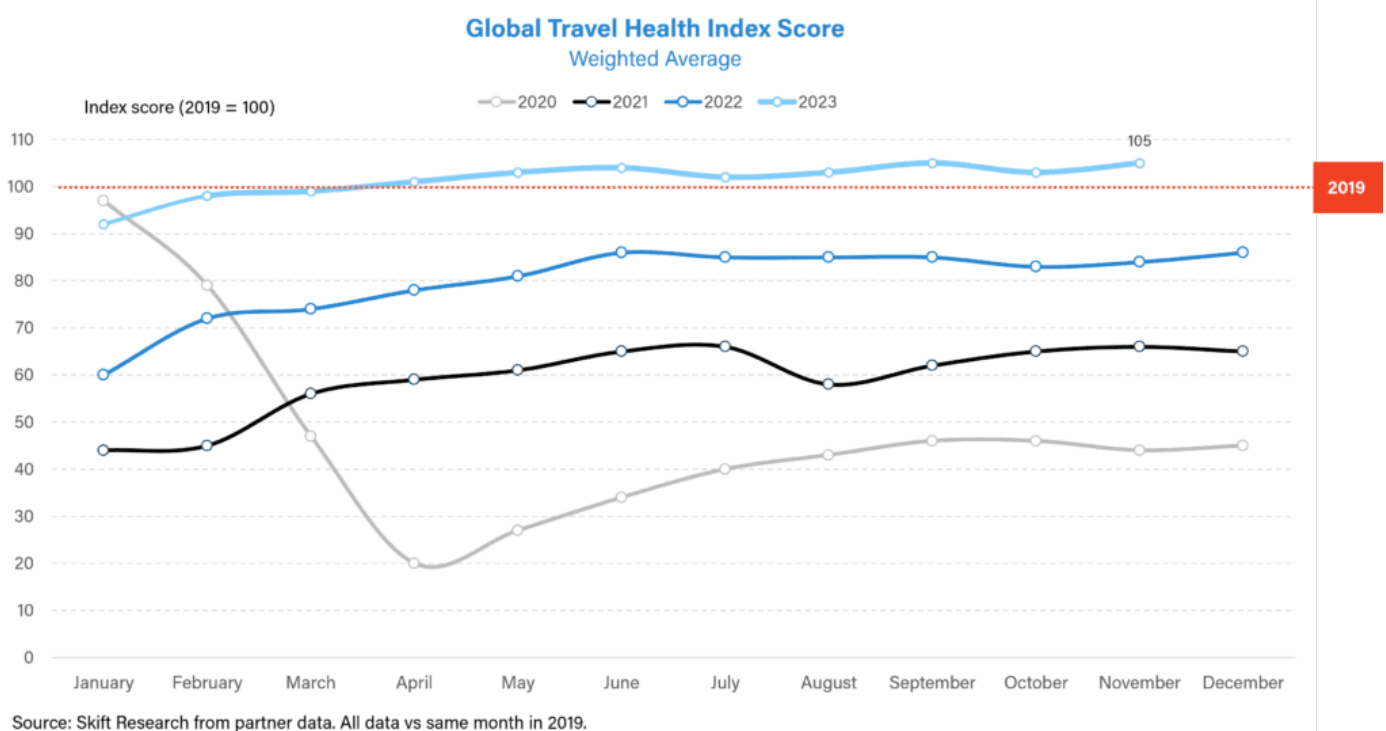
Executive Summary

The Skift Travel Health Index stands at 105 in November 2023, gaining 2 percentage points (pp) over the last month.

Latin America's Travel Health Index score witnessed a "Swiftie bump" this month, achieving the highest-ever regional score of 117. The Taylor Swift Eras Tour gracing Argentina and Brazil sparked an upsurge in demand across all sectors within the region. Hotels and airlines in the region have the highest global scores this month.

Inbound travel volumes, though, have not completely rebounded back to 2019 levels in most countries in the region. Brazil's plan to implement an e-visa requirement in 2024 might influence inbound arrivals to the country.

Global Travel in 2023 Sets New Benchmarks

As winter travel fuels demand, global travel is back to 105 in November 2023, gaining 2 pp over the previous month. This indicates another month of the index overtaking 2019 performance levels, setting a new benchmark for the travel industry.

Global Travel Health Index Score
Weighted Average

Index score (2019 = 100)

— 2020 — 2021 — 2022 — 2023

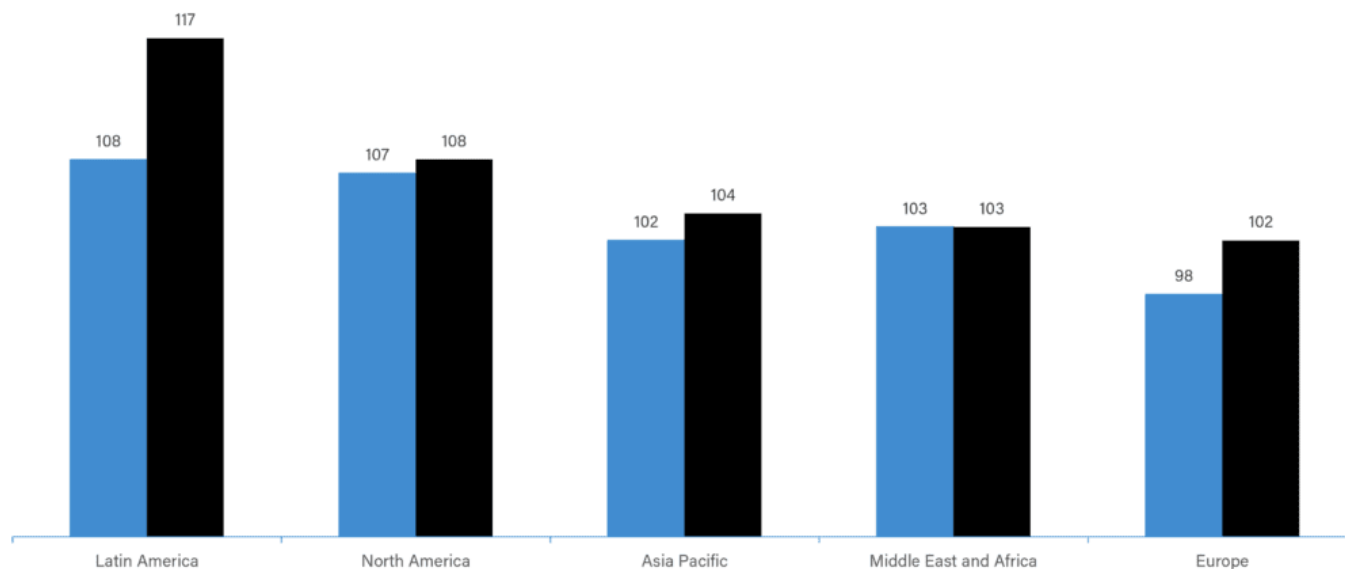Source: Skift Research from partner data. All data vs same month in 2019.

Regional performance shows gains across all regions. Latin America continues to lead, surging by 9 pp this month to achieve an index of 117, the highest regional index ever.

Travel Health Index Score by Region
Relative to 2019

■ Oct-23   ■ Nov-23

	Latin America	North America	Asia Pacific	Middle East and Africa	Europe
Oct-23	108	107	102	103	98
Nov-23	117	108	104	103	102

Source: Skift Research from partner data

The top of the table is a mixed bag of countries across all regions, with Mexico and Brazil leading and driving the index for Latin America. Argentina, too, is one of the best-performing countries this month.

The European region, notably Spain, showed significant progress this month, gaining 12 pp, to stand at 115, which is 15 pp above November 2019. According to data from ForwardKeys, the volume of air ticket purchases to Spain was 10.7% higher than in 2019. The country welcomed 6.2 million international passengers in November 2023, marking a 15.8% increase over November 2022. All other sectors in the country benefited from this surge.

5 out of the 7 European countries tracked by the index have surpassed pre-pandemic performance levels this month. Germany and Russia, where recovery has been slower, have improved over the past month too.

The U.S. and Canada are also among the top-performing countries this month, with all travel sectors having surpassed the pre-pandemic performance levels.

Most countries in the Asia Pacific are at the bottom end of the table, mainly countries dependent on Chinese travel, which has not rebounded yet. On the other hand, China
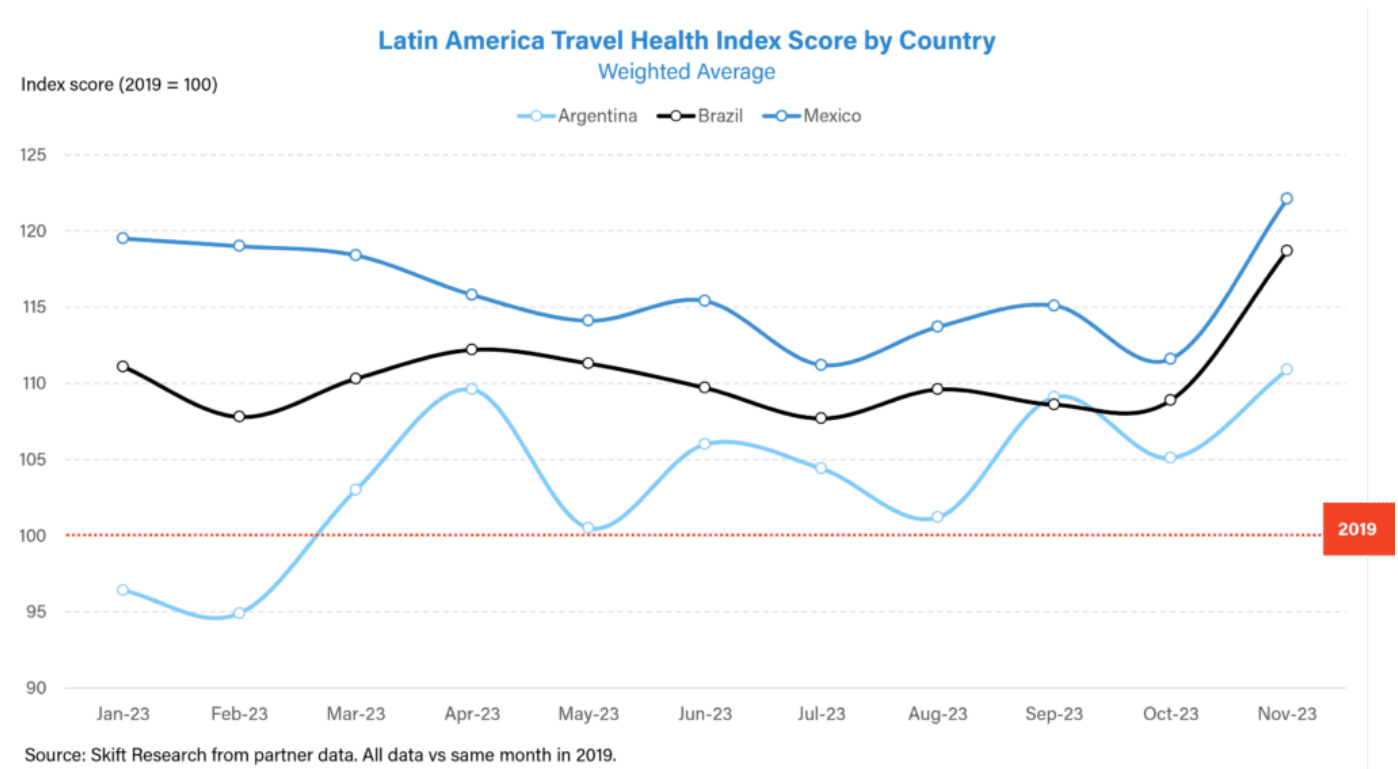
has recovered 6 pp over 2019 levels, owing to the domestic travel surge in the country.

Skift Travel Health Index Performance by Country

Country	Nov-23	Oct-23	MoM Growth (abs)	YoY Growth (abs)
Mexico	122	112	11	8
Brazil	119	109	10	15
Spain	115	104	12	16
United Arab Emirates	115	116	-1	12
Turkey	113	114	0	5
Argentina	111	105	6	20
India	111	116	-5	13
United Kingdom	110	107	3	12
U.S.	109	108	1	5
Canada	107	105	2	12
China	106	101	5	49
Japan	106	104	2	33
France	103	102	2	7
Italy	103	99	4	8
Australia	100	96	4	7
Germany	96	92	4	13
Thailand	94	92	2	14
Indonesia	93	90	3	12
Singapore	93	93	0	5
Hong Kong, China	91	91	0	36
South Africa	87	85	2	5
Russia	67	65	2	15

Latin America Travel Performance Peaks

Latin America's travel performance peaked at 117 this month, marking the highest-ever regional index recorded. Mexico leads the travel performance rankings within the region, closely followed by Brazil. Argentina has consistently surpassed 2019 travel performance levels since March this year.

Latin America Travel Health Index Score by Country
Weighted Average

Index score (2019 = 100)

—○— Argentina   —○— Brazil   —○— Mexico

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

While inbound travel to some countries in the region is still recovering, others seem to have gained popularity this year. For instance, inbound travel to the Dominican Republic as of September this year is 21% higher than in 2019 for the same period. Nonetheless, Mexico still has the highest number of inbound arrivals and remains the most popular travel destination in the region.

Since 2019, Brazil has waived its visa requirement for travelers from the U.S., Australia, Canada, and Japan. However, the country's tourism board has declared the implementation of an e-visa requirement from January 2024 onwards. As of September 2023, inbound arrivals to Brazil were still 9% lower than in 2019. The introduction of the new visa policy may potentially impact these arrival numbers further.

Inbound Arrivals to Latin America by Destination (Jan-Sept 2023)

Rank #	Country	Arrivals (in mil.)	Growth over 2019
1	Mexico	30.9	-6%
2	Dominican Republic	6.0	21%
3	Argentina	5.3	-2%
4	Brazil	4.4	-9%
5	Colombia	3.4	11%
6	Chile	2.6	-25%
7	Costa Rica	2.1	-13%
8	Cuba	1.8	-45%
9	Peru	1.8	-46%
10	Panama	1.4	5%
11	Ecuador	1.1	-38%
12	Bolivia	0.8	-21%
13	Paraguay	0.4	-53%

Source: UNWTO

OAG data suggests that international airline seat capacity is ~17% above 2019 levels. It is one of the few destinations that never really shut down, even through the pandemic, and has quickly ramped up since travel restrictions around the world were eased. Data from ForwardKeys shows that air passenger arrivals to Mexico rebounded to pre-pandemic levels early this year and have been on an upward trend ever since.

Latin America Growth in Air Passenger Arrivals by Destination
Relative to 2019

— Argentina   —●— Brazil   —●— Mexico
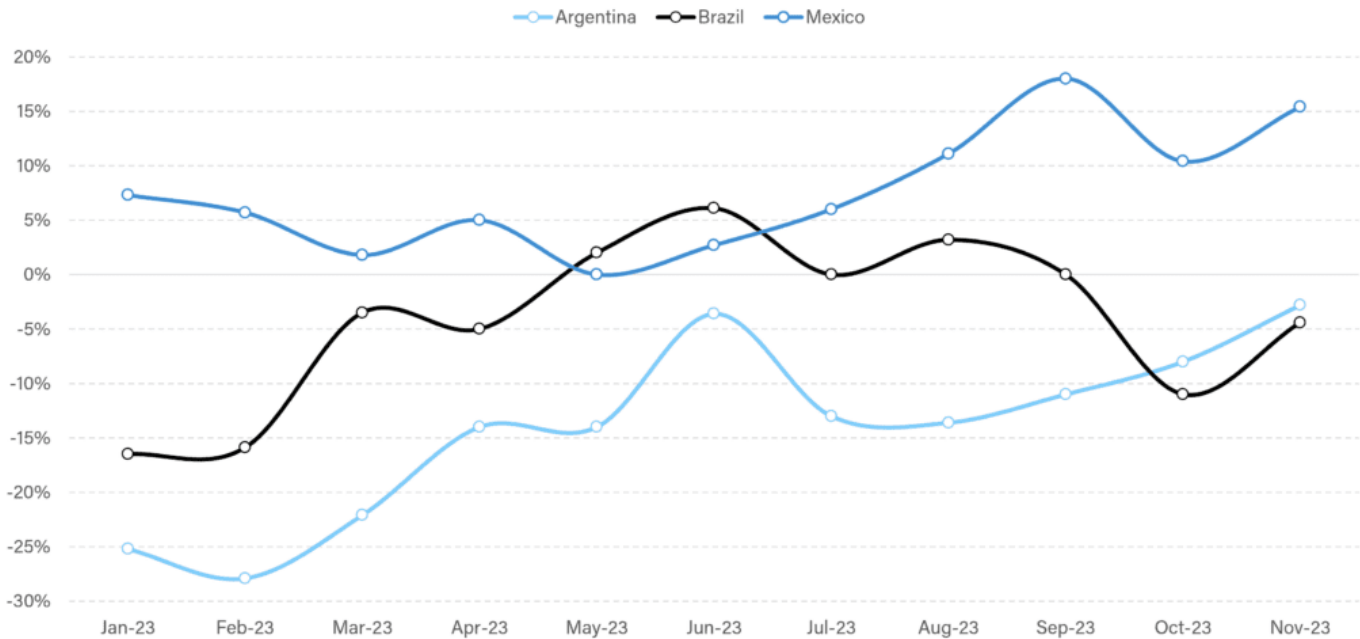
Source: ForwardKeys

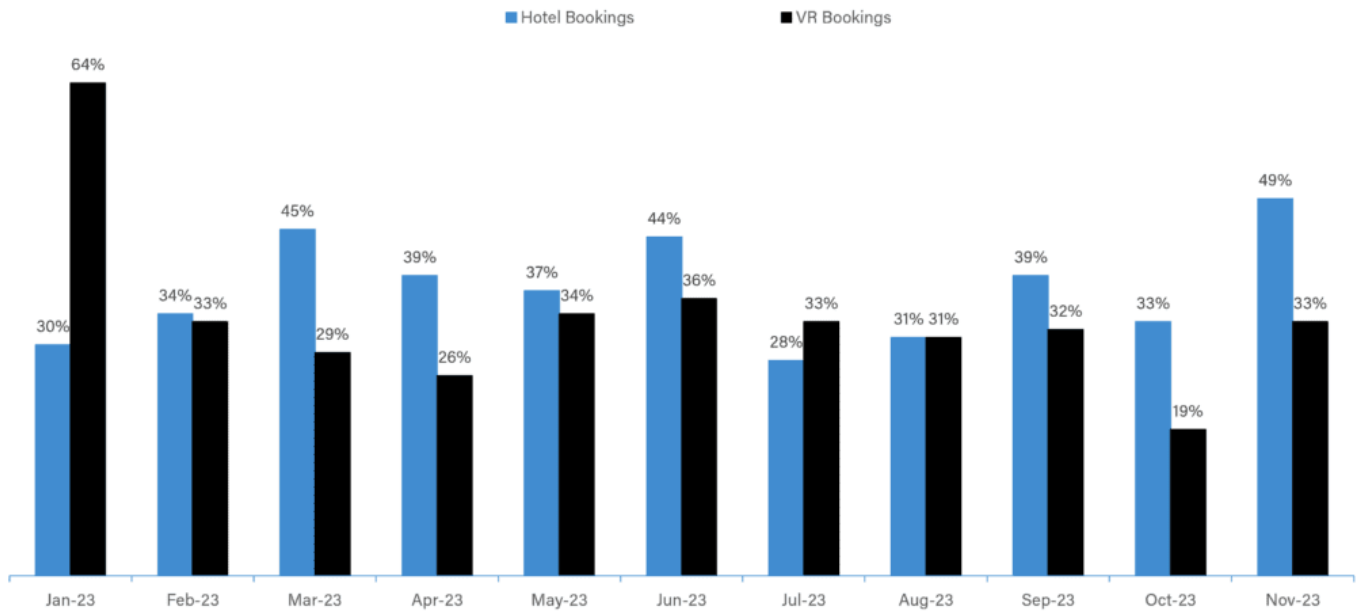# Accommodation Sector's Stellar Performance in Latin America

Examining the data on a sectoral level shows robust growth across all sectors in Latin America. The accommodation sectors, like hotels and vacation rentals, stand out, exhibiting 35% and 29% growth over November 2019, respectively.

Latin America Skift Travel Health Index Performance by Sector

Sector	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Oct-Nov
Aviation	104	104	105	101	104	113	+9
Hotels	132	122	126	128	125	135	+10
Vacation Rentals	128	131	132	134	125	129	+4
Car Rental	98	94	90	103	100	101	+1

Hotel and vacation rental bookings in the region have, on average, been 34%-37% higher than those in 2019. Hotel bookings in the region witnessed the highest jump in November 2023. This growth can be tied to the "Taylor Swift Effect." The Eras Tour moved to Argentina and Brazil in November 2023. According to RateGain, hotel bookings in Argentina were soaring even after the concert dates.

Latin America Hotel and Vacation Rental Booking Growth
Relative to 2019

■ Hotel Bookings   ■ VR Bookings

|	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23
Hotel Bookings	30%	34%	45%	39%	37%	44%	28%	31%	39%	33%	49%
VR Bookings	64%	33%	29%	26%	34%	36%	33%	31%	32%	19%	33%

Source: Skift Research from partner data

Hotel ADRs have witnessed significant growth compared to 2019 as well as last year. Hotels in cities hosting The Era's Tour reported very high occupancy levels, even with elevated rates due to the surging demand.

São Paulo, Brazil, hosted a myriad of events in November, including the UFC Fight Night, the Brazilian Grand Prix, and Taylor Swift's Eras Tour. The city's hotel industry, as a result, achieved its highest monthly ADR of BRL 749.67 (US$ 152) this month, marking a 20.7% increase over last year. Occupancy, too, surged 5 pp year-on-year to reach 71.9%, marking only the second time since November 2019 that occupancy surpassed the 70% mark.

Latin America Hotel Published Rate Growth

■ Growth over 2019 ■ Growth over 2022
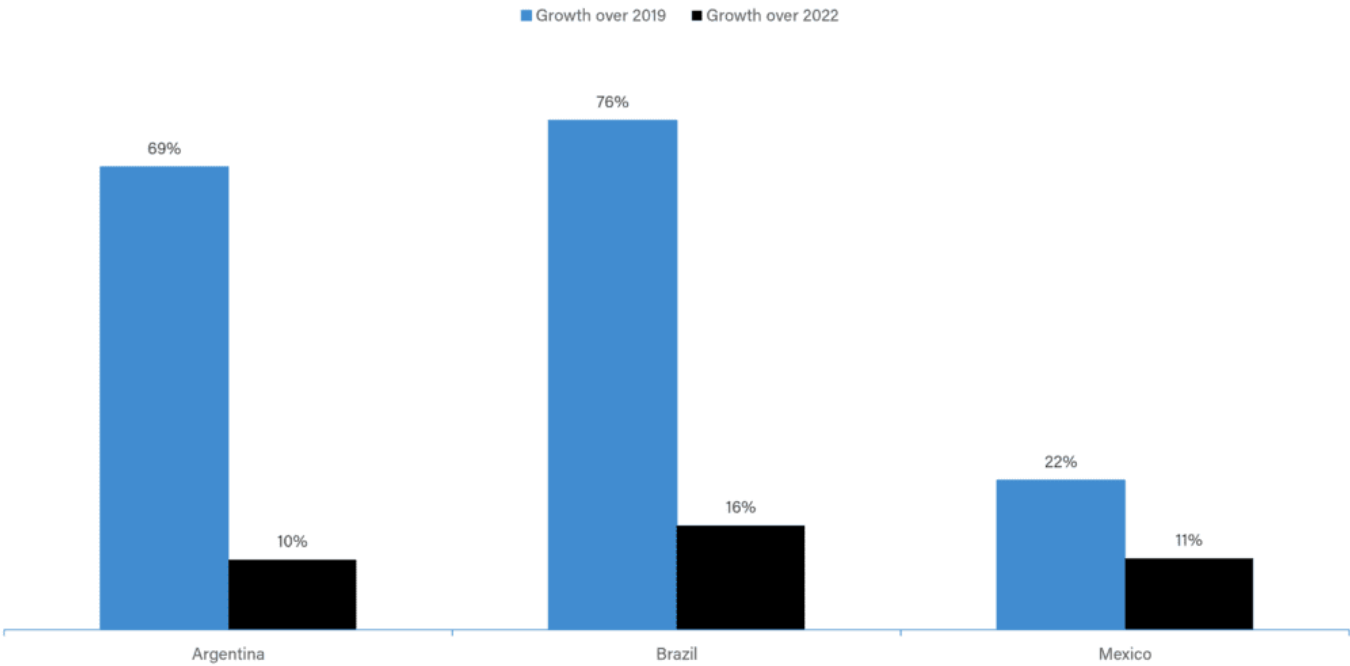
Source: Lighthouse

On-the-books data for vacation rentals shows that both occupancy and ADR in the region are expected to exhibit growth over 2019 levels.

Latin America Vacation Rental On-the-Books Occupancy and ADR Growth
(Relative to 2019)

■ Occ Growth Dec-23 ■ Occ Growth Jan-24 ■ Occ Growth Feb-24   ■ ADR Growth Dec-23 ■ ADR Growth Jan-24 ■ ADR Growth Feb-24
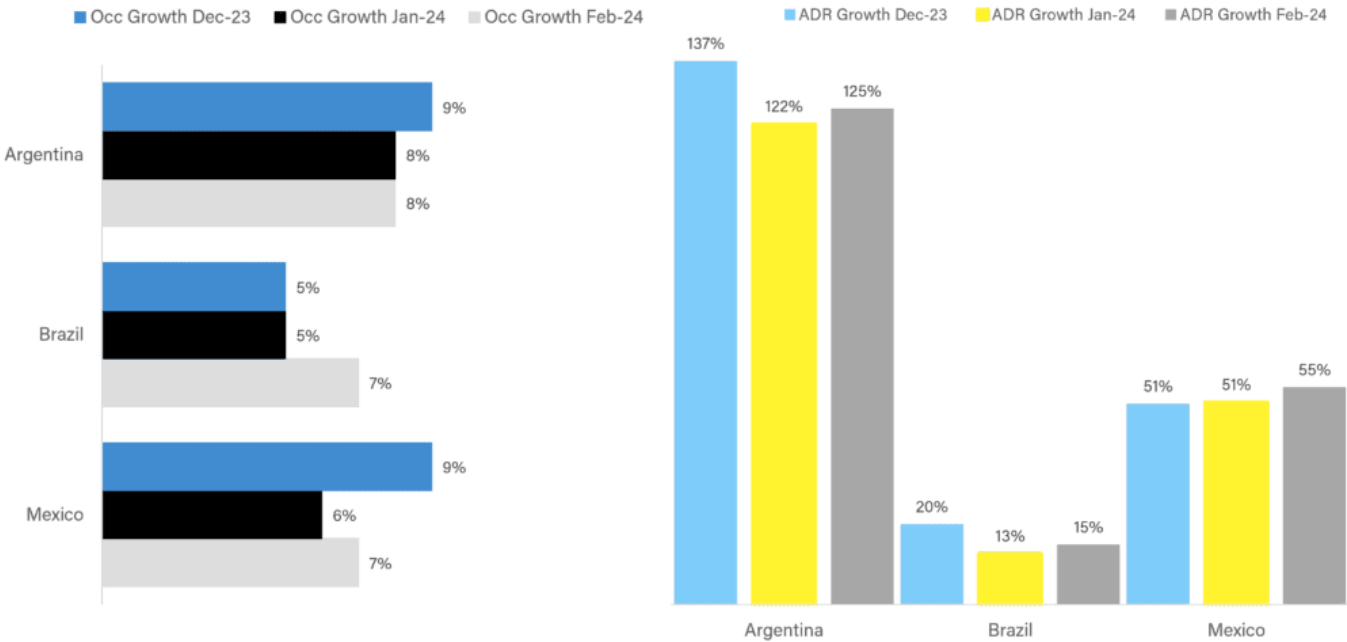
Source: Lighthouse

Conclusion

The global Travel Health Index rose by 2 pp to reach 105, continuing the trend of surpassing pre-pandemic levels for another month. Latin America soared to an all-time high regional index of 117, led by the Taylor Swift Eras Tour, igniting robust demand across all sectors.

Despite overall positive trends, inbound travel across various countries in the region has yet to rebound to 2019 levels. Policy changes, such as Brazil's upcoming e-visa implementation, might influence future arrivals.

Methodology

Data Partners

Skift Research collects and analyzes data from 21 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:

Aviation	Hotels	Vacation Rentals	Car Rental
Measures flight intent through search volumes, flight bookings made, and key performance indicators (KPIs) like passenger volumes, lounge visits, and load factors.	Analyzes hotel stay intent through searches, hotel bookings and sales, on the books reservations, and KPIs including occupancy and room rates.	Tracks performance of rentals through bookings, on the books reservations, and KPIs including occupancy, nightly rates, and revenues.	Measures car rental searches, bookings, on the books reservations, total rental volumes, and average transaction values.

Country Coverage

The Index focuses on the travel performance in 22 of the largest tourism economies, namely, Argentina, Australia, Brazil, Canada, China, France, Germany, Hong Kong, India, Indonesia, Italy, Japan, Mexico, Russia, Singapore, South Africa, Spain, Thailand, Turkey, U.S., United Arab Emirates, and United Kingdom. These countries together account for 62% of inbound tourism receipts, 67% of outbound tourism expenditure, and 78% of global 2019 GDP.

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, 2022, and 2023 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

	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023

	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023
Argentina	109.6	100.5	106.0	104.4	101.2	109.1	105.1	110.9
Australia	97.2	94.7	99.5	97.0	97.3	99.9	96.4	99.9
Brazil	112.2	111.3	109.7	107.7	109.6	108.6	108.9	118.7
Canada	99.9	104.4	108.9	106.2	105.5	107.5	105.3	106.9
China	102.0	101.8	99.7	97.6	96.1	102.2	101.1	106.0
France	111.3	111.9	109.9	105.0	107.8	107.7	101.7	103.3
Germany	93.8	93.3	96.6	92.1	91.2	97.2	91.7	96.0
Hong Kong, China	76.0	73.2	70.1	76.5	100.2	89.9	91.1	91.3
India	110.0	110.1	112.7	110.3	116.2	115.5	115.6	110.7
Indonesia	90.2	93.6	104.5	88.8	94.0	94.1	89.9	93.0
Italy	101.9	108.6	105.6	102.2	102.6	103.6	99.1	102.6
Japan	104.7	107.9	106.9	104.6	109.8	107.2	103.9	105.7
Mexico	115.8	114.1	115.4	111.2	113.7	115.1	111.6	122.1
Russia	64.4	65.9	69.0	69.1	66.9	67.8	64.6	66.5
Singapore	102.2	101.3	104.1	96.7	98.2	96.6	92.5	92.5
South Africa	89.9	91.5	92.3	89.8	88.5	86.3	84.8	86.7
Spain	107.3	104.6	102.5	103.4	104.7	104.9	103.8	115.4
Thailand	103.6	102.8	104.0	102.0	96.7	98.1	91.7	93.6
Turkey	107.8	118.7	120.6	108.0	120.4	119.3	113.6	113.3
U.S.	98.6	102.3	108.8	107.6	107.8	110.5	108.0	109.0
United Arab Emirates	109.1	121.6	110.9	104.8	113.6	118.6	115.6	114.6
United Kingdom	104.8	110.0	108.3	109.2	110.1	109.6	106.8	109.8

Aviation Scores by Country

	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023
Argentina	98.5	84.4	95.6	94.2	92.2	92.6	97.0	100.9
Australia	94.5	93.3	99.6	101.2	104.5	105.6	105.9	112.6
Brazil	110.4	113.2	106.8	105.4	108.2	98.3	100.7	111.4
Canada	88.1	89.5	95.2	99.8	102.2	100.3	101.2	106.0
China	61.2	63.0	64.4	66.5	65.8	66.7	66.3	80.0
France	105.7	99.4	96.1	95.5	97.9	96.2	93.0	95.7
Germany	92.1	90.2	94.1	93.6	93.0	90.4	87.1	91.5
Hong Kong, China	54.6	53.0	56.3	59.8	77.8	76.3	75.5	77.2
India	104.1	110.3	112.8	109.8	112.5	114.1	111.4	111.8
Indonesia	64.8	68.0	83.6	64.6	71.5	74.8	73.1	76.8
Italy	100.3	117.0	110.8	109.7	109.8	111.3	106.5	107.3
Japan	89.5	95.7	95.7	95.7	106.2	105.2	105.9	108.0
Mexico	111.4	109.6	109.6	112.9	114.1	116.3	116.6	128.3
Russia	70.7	73.9	79.9	79.1	73.1	76.6	70.0	73.6
Singapore	76.2	75.8	86.1	83.7	82.1	82.0	81.7	89.7
South Africa	73.6	75.0	71.5	72.5	67.2	69.1	67.9	67.1
Spain	111.3	109.3	107.0	108.0	108.2	109.4	110.4	123.2
Thailand	83.9	81.6	91.1	88.1	90.6	91.4	93.8	95.3
Turkey	104.5	114.1	114.0	107.7	114.3	109.4	101.5	104.7
U.S.	92.0	97.3	108.8	112.9	114.3	116.0	112.6	110.5
United Arab Emirates	96.0	112.6	102.4	99.6	104.6	106.9	101.9	98.2

	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023
United Kingdom	92.4	99.7	95.2	100.2	103.5	103.9	102.1	103.4

Aviation contributes 40% 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

	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023
Argentina	124.5	124.0	128.3	120.6	118.9	130.0	125.0	134.8
Australia	90.1	89.0	96.7	90.0	91.7	92.6	82.9	83.5
Brazil	132.3	128.7	135.4	127.7	131.1	131.2	132.0	141.8
Canada	109.6	123.6	131.6	117.5	113.5	123.9	119.4	118.8
China	112.6	114.0	113.6	108.6	110.3	114.5	101.7	95.8
France	113.6	121.5	125.8	115.2	118.2	115.6	103.1	104.5
Germany	100.4	100.6	110.4	99.0	99.2	110.2	98.0	99.5
Hong Kong, China	87.6	75.2	68.5	81.2	121.7	99.9	105.4	102.1
India	116.7	109.6	115.1	111.3	123.8	121.9	124.9	108.2
Indonesia	110.6	115.0	128.6	103.7	110.4	107.6	96.7	98.2
Italy	108.5	108.3	106.1	101.7	100.7	101.4	94.3	91.4
Japan	120.7	121.8	122.9	124.3	128.6	111.1	99.5	100.2
Mexico	126.5	125.4	130.4	115.8	125.8	120.9	113.9	126.7
Russia	48.3	47.2	46.7	46.7	46.6	45.2	44.2	46.4
Singapore	131.6	128.5	122.2	106.3	110.4	109.2	99.2	92.9
South Africa	111.2	111.5	116.5	110.3	113.6	105.7	109.2	114.8
Spain	109.7	106.2	102.9	102.3	104.6	99.9	96.7	106.2

	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023
Thailand	133.6	123.6	123.5	117.6	107.6	107.7	88.3	87.8
Turkey	113.3	135.9	141.5	109.5	134.6	136.0	123.0	114.8
U.S.	105.2	112.6	117.3	112.3	108.8	105.0	100.6	104.5
United Arab Emirates	113.7	127.7	110.9	98.1	108.8	116.6	118.3	117.1
United Kingdom	116.3	123.0	124.5	123.6	120.3	112.7	111.0	115.3

Hotels contributes 35% 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

	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023
Argentina	147.3	147.1	149.2	154.9	152.8	154.3	151.9	154.6
Australia	136.1	126.7	128.4	128.2	121.2	131.4	120.3	122.8
Brazil	129.5	125.6	125.6	131.6	128.4	129.6	117.1	119.0
Canada	124.4	125.2	124.6	131.6	128.6	117.2	101.9	102.4
China	178.1	175.4	154.4	147.7	141.2	160.4	154.4	164.0
France	132.7	133.2	132.4	130.6	126.9	142.4	145.5	142.5
Germany	113.2	105.8	101.9	102.4	102.5	110.9	112.2	122.4
Hong Kong, China	83.9	82.4	85.3	93.1	106.5	105.4	101.2	108.4
India	112.4	113.9	119.5	122.8	122.6	118.9	113.5	117.2
Indonesia	92.9	99.8	107.3	114.3	112.7	112.1	109.0	115.2
Italy	129.2	133.3	128.2	128.2	132.0	131.8	129.6	135.3
Japan	118.2	120.7	117.1	115.0	120.1	123.8	123.0	131.6
Mexico	121.5	119.6	115.6	109.9	120.6	123.8	117.9	124.2

	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023
Russia	107.5	113.3	121.7	126.2	128.3	128.6	126.7	123.0
Singapore	117.9	120.3	121.7	124.8	128.5	122.7	113.9	115.2
South Africa	88.0	91.0	90.9	95.5	95.3	91.5	88.7	91.2
Spain	125.3	124.3	122.8	121.5	126.7	132.1	138.7	144.4
Thailand	118.3	109.4	108.1	115.0	114.6	111.7	109.6	114.5
Turkey	117.7	122.1	126.0	131.9	133.2	142.2	142.7	159.3
U.S.	122.1	117.2	119.7	119.4	117.0	121.9	120.3	122.0
United Arab Emirates	140.1	144.9	140.0	150.7	157.8	170.6	170.8	172.0
United Kingdom	124.3	122.0	122.9	125.8	123.1	130.3	116.0	117.6

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

	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023
Argentina	97.5	93.7	88.9	77.9	85.3	92.6	84.8	88.6
Australia	107.1	105.6	101.5	99.6	90.3	98.8	98.8	104.4
Brazil	98.7	100.9	96.8	96.2	91.2	109.5	107.0	107.1
Canada	118.3	116.5	110.4	107.2	106.8	113.4	116.9	111.9
China	135.0	128.0	131.1	121.3	119.7	135.6	156.7	160.3
France	121.4	123.9	109.3	101.4	103.4	106.2	101.4	104.0
Germany	85.0	88.1	82.8	80.0	72.3	84.7	84.8	94.6

	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023
Hong Kong, China	109.8	116.6	109.8	108.3	114.5	101.8	101.7	101.5
India	117.3	116.7	111.3	110.4	112.7	111.1	115.1	118.1
Indonesia	117.3	116.7	111.3	110.4	112.7	111.1	115.1	118.1
Italy	84.4	85.2	87.8	84.2	77.4	81.2	79.1	100.2
Japan	116.7	117.7	110.4	111.6	104.7	110.3	113.9	113.2
Mexico	113.4	110.0	109.9	107.2	94.1	103.5	102.7	104.6
Russia	74.6	74.6	74.6	74.6	74.6	74.6	74.6	74.6
Singapore	116.2	111.3	110.0	101.9	110.8	107.0	109.7	107.8
South Africa	103.0	101.6	104.0	96.5	88.3	95.8	88.3	88.6
Spain	88.1	89.9	84.8	87.6	83.8	92.2	88.7	106.0
Thailand	98.7	110.6	104.0	103.0	88.9	98.1	95.4	97.8
Turkey	109.2	94.2	103.6	95.3	95.3	97.4	110.4	113.8
U.S.	97.1	93.6	96.6	89.8	97.3	115.9	113.6	116.0
United Arab Emirates	121.5	124.5	123.1	112.7	123.8	128.6	117.8	123.5
United Kingdom	107.2	108.0	104.6	100.4	101.1	109.7	109.7	114.9

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.