



# SKIFT RECOVERY INDEX

## MONTH OF AUGUST

SKIFT RESEARCH TAKE



by + Skift Team  
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# Skift.

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# REPORT OVERVIEW

This report highlights the latest insights from the Skift Recovery Index. The index covers travel's performance from December 29th, 2019 to August 29th, 2020 (weeks 1 to 35). This report focuses on the performance during the month of August.

The Skift Recovery Index is a real-time measure of where the travel industry at large — and the core verticals within it — stands in recovering from the COVID-19 pandemic. It provides the travel industry with a powerful tool for strategic planning, of utmost importance in this uncertain business climate.

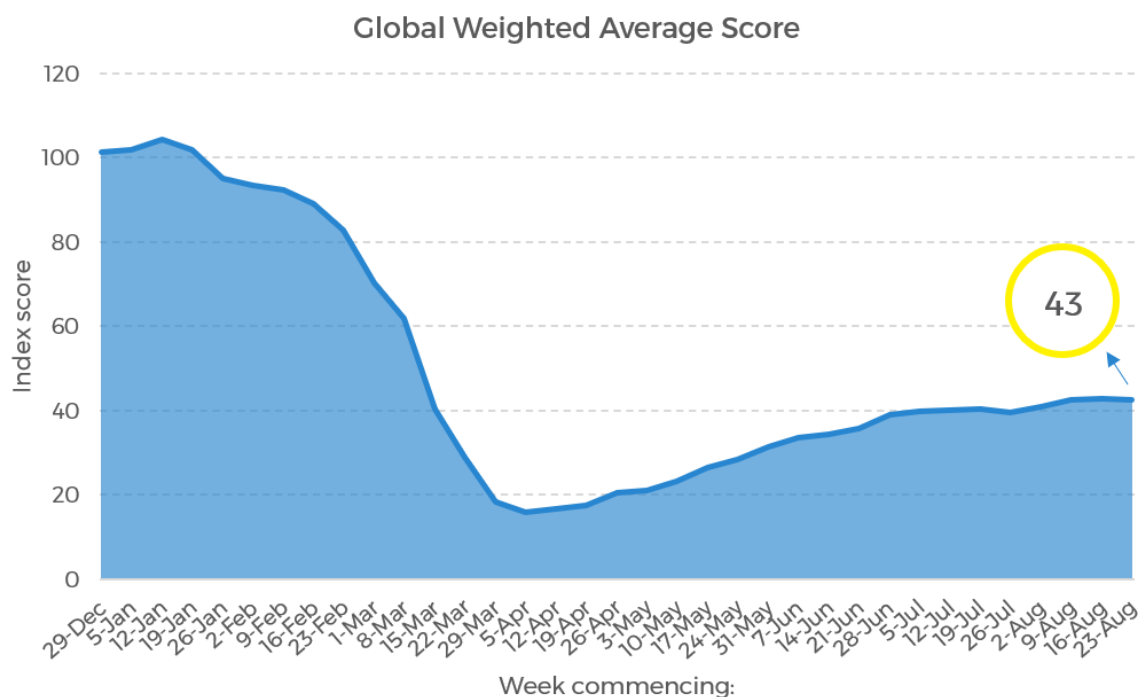
Since the last update in July, we have added data from Aviasales and Onyx CenterSource to the index. [Aviasales](#), a major travel search engine in Russia, offers us a better insight into search and booking behavior of Russian travelers. [Onyx CenterSource](#), a provider of payment solutions for the hospitality industry, gives a better insight into hotel commissions. We also continue to work with [Amadeus](#), [Arrivalist](#), [Collinson](#), [Criteo](#), [Duetto](#), [Hotelbeds](#), [Key Data Dashboard](#), [OAG](#), [RateGain](#), [Shiji Group](#), [SimilarWeb](#), [SiteMinder](#), [Skyscanner](#), [Sojern](#), [Transparent](#), and [TrustYou](#) as data partners.



## Recovery Score Has All But Flatlined

August. Normally a summer bumper month; this year far from it. The Skift Recovery Index has stalled at 43 over the past month, against a baseline of 100 for 2019 performance during the same weeks.

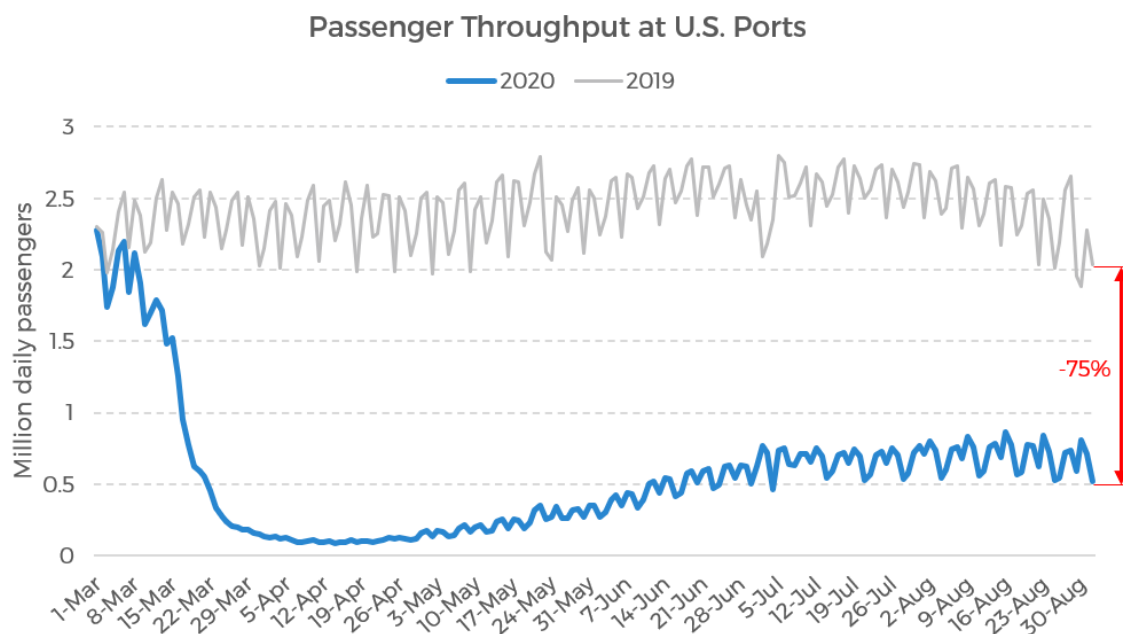
### Exhibit 1: Skift Recovery Index score has seen little movement



Source: Skift Research. Data as of August 2020.

This is not to say that travel volumes and bookings have not grown. As the recovery index tracks the current performance against that of the same time last year, seasonality is taken into account, and a flat performance in the index means a growth in travel volumes like any other August for destinations in the northern hemisphere, including the U.S. and European markets. We can see this in many of the sources that are incorporated in the index.

In the U.S., where there are still major pockets of outbreaks, passenger throughput at major ports, as measured by the [Transportation Security Administration](#) has been increasing, although total volumes are still far from 2019 levels.

**Exhibit 2: Passenger throughput at 25% of pre-COVID levels**

Source: TSA. Data as of August 2020.

Likewise, new flight bookings made in 2020 by Russian travelers through the Aviasales platform have increased by 6% CAGR since early June, after slowing down significantly during April and May. Weekly bookings are now at a higher level than at the start of the year.

**Exhibit 3: Cumulative flight bookings shows healthy growth in Russia**

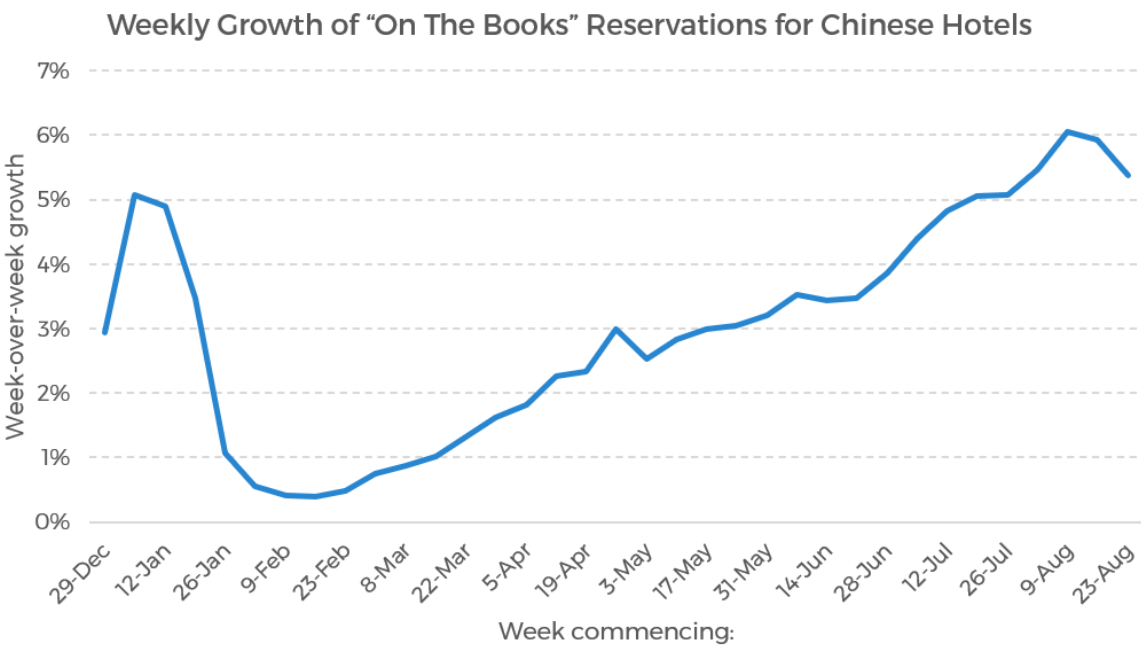
Source: Aviasales. Data as of August 2020.

The question now is whether the industry can stretch the summer peak into September and October, or whether demand will fall as it would do in normal times. If the industry

manages the former, we might see strong increases in index scores over the coming few months. If the latter comes to pass, the index is cursed to remain between the 40 to 50 mark for the foreseeable future.

China might be providing some indication. The country has benefited from a strong domestic travel season, and has seen domestic flight capacity and hotel occupancy close to pre-COVID levels. The country has experienced an accelerating recovery over the past few months, but according to hotel booking data from Shiji Group, the pace of growth has slowed down in August. The end of summer holiday period and children returning to school might have contributed to this slowdown.

**Exhibit 4: On the books reservation growth has sped up over the past months**

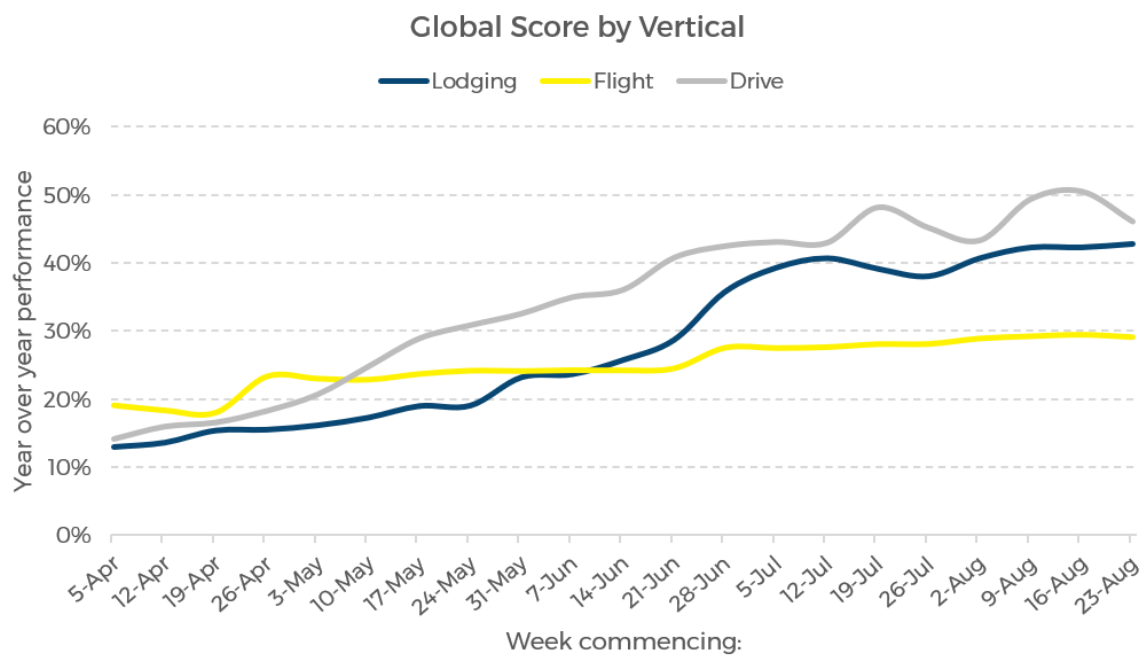


Source: Shiji Group. Data as of August 2020.

**Analyzing the Recovery by Travel Sector**

Splitting the indicators by travel vertical, or sector, shows that drive remains a strong performer, and clearly a direct substitute for flying. Lodging continues the upward movement. In other words, no matter whether travelers drive or fly, travel accommodations seem to benefit from any growth in travel demand.

Exhibit 5: Skift Recovery Index breakdown by travel vertical



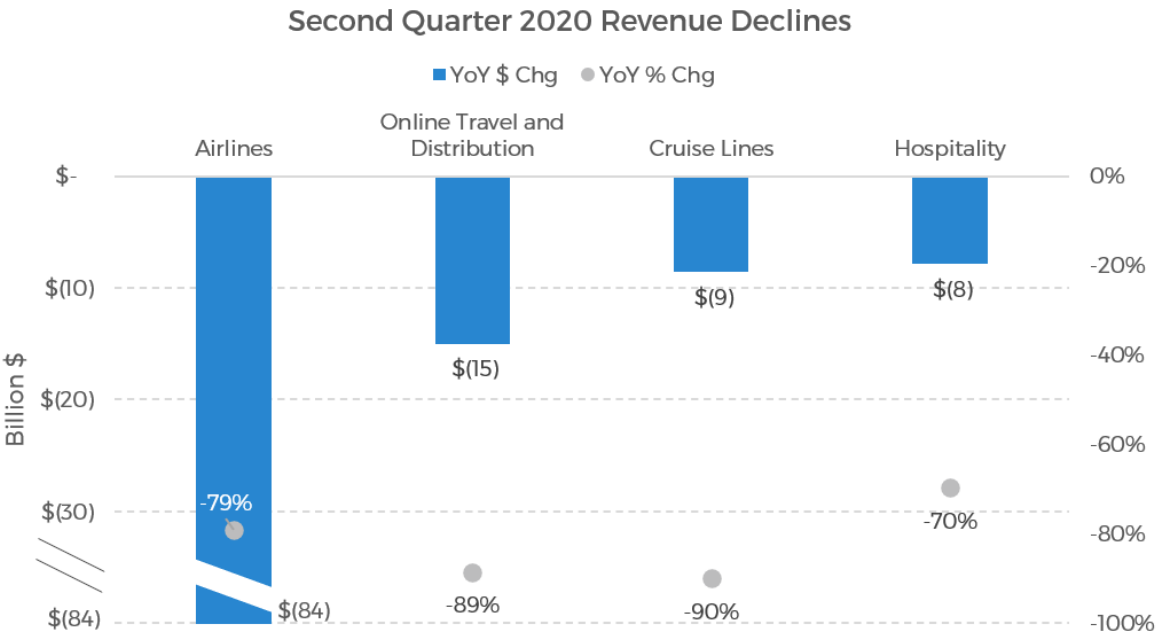
Source: Skift Research. Data as of August 2020.

AIR RECOVERY REMAINS SLOW

It has become clear that the airline industry particularly has a long road to recovery.

Skift Research tracks the performance of 100 public travel companies through the [Skift Health Score](#). Part of the score is based on company revenues. Our Health score shows that in dollar terms, airlines in the top 100 public travel companies have lost [more than \\$84 billion](#) in revenue in the second quarter of 2020, compared to the second quarter of 2019.

Exhibit 6: Travel saw 70-90% Revenue Declines in 2Q 2020



Source: Skift Research. Data as of August 2020. Note line break on the left-hand Y-axis.

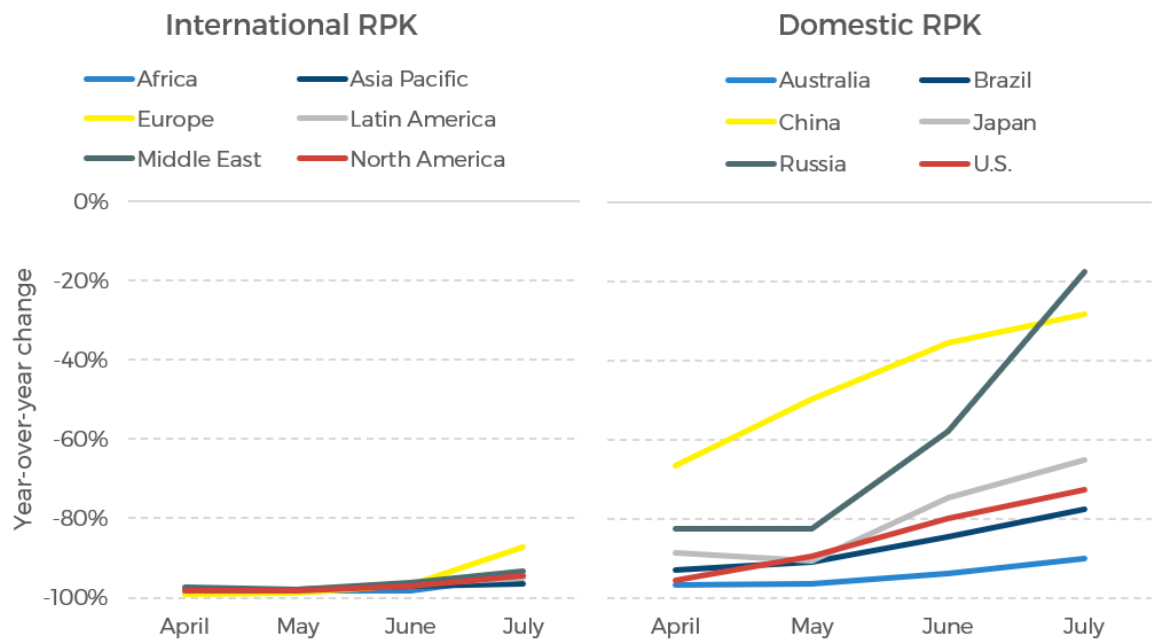
IATA recently released [an update](#) which forecasts passenger demand to return to pre-COVID levels by 2024. This is largely in line with what airline CEOs have been saying during second quarter earning calls.

SAS Group CEO Rickard Gustafson, for example, explained his expectations for the coming years, predicting that up to 2022 demand will increase in what he called a “ramp-up phase” and that it is “going to take another few years” after that for demand to return to 100% pre-COVID levels.

While flight performance has clearly been impacted, seat capacity data from OAG shows some bright spots. By the end of August, the amount of seats available on commercial planes was back up to 92.9% of 2019 levels. In Russia this was just short of 80%, and in the U.S. at around 53%.

Furthermore, monthly data from IATA (not yet available for August) shows that RPK (revenue passenger kilometres, a key metric in airline reporting measuring kilometres flown by paying customers) is starting to increase slightly for international flights, particularly in Europe, and has registered a strong rebound for domestic flights in markets like China and Russia.

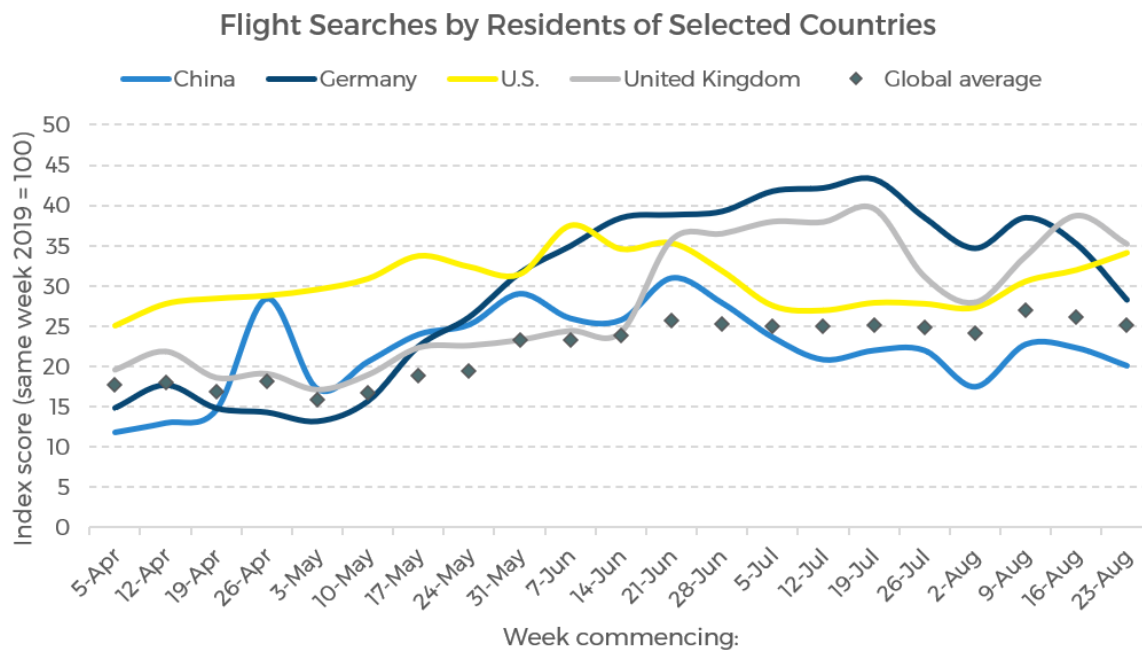
Exhibit 7: Domestic RPK performance leading the way



Source: IATA. Data as of August 2020.

However, a strong indicator of forward-looking travel demand in these uncertain times is consumer search behavior, and here the data looks less positive. The Skift Recovery Index tracks search behavior from some of the largest companies in airline search and distribution, including Skyscanner, Amadeus, and Sojern, and has registered a very flat performance since April. While there are some short-term spikes as countries change lockdown rules or announce travel corridors, there is little upward movement when viewing this longer term.

## Exhibit 8: Average flight search only at a quarter of last year's performance



Source: Amadeus, Skyscanner, Sojern, Skift Research. Data as of August 2020.

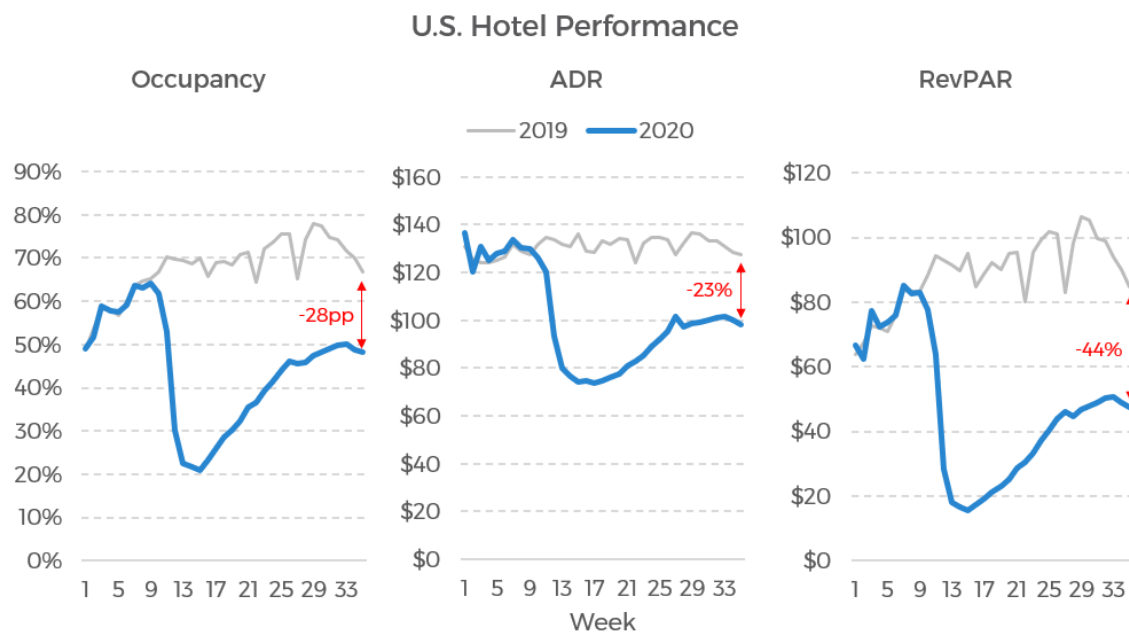
With this in mind, it becomes clear why airlines CEOs and airline bodies like IATA are thinking in terms of years rather than months when forecasting a full recovery. The month of August showed very little signs of recovery for airlines. Instead it is more of the same since we reached the lowest point in April. Despite some bright spots, mostly in terms of domestic travel, the global performance remains depressed considerably, and it might not be until 2021 that we will start to see considerable growth.

### LODGING RELATIVELY STRONG, BUT GROWTH STAGNATED

There is no denying that hotels were hit as hard as airlines at the depths of April and May, although they seem to have been better able to benefit from pent-up travel demand since.

STR data — used in the index — shows that average hotel performance across most destinations is improving. In China, weekly occupancy rates have returned to 90% of 2019 levels, with RevPAR only trailing last year's performance by 23%.

## Exhibit 9: U.S. hotel recovery stagnated in July



Source: STR. Data as of September 4, 2020

The U.S. has seen performance improving steadily as well, although most of the gains were made before the summer months of July and August. As the above data from the U.S. hotel market shows, the largest jump was made before week 28 (start of July), and since then performance has slightly stagnated.

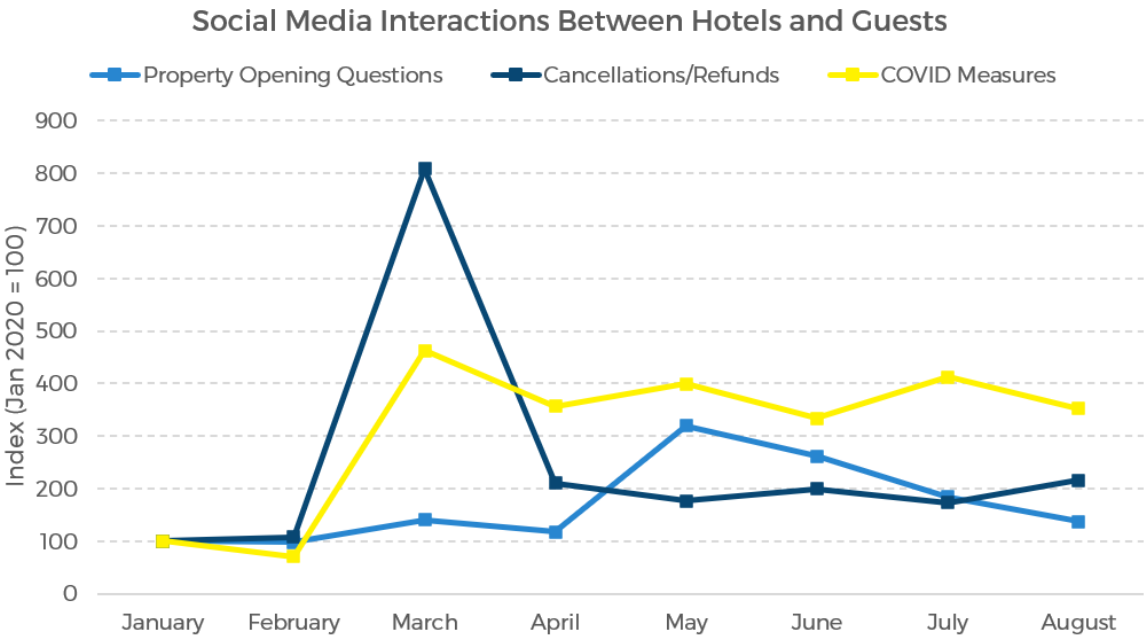
For full year 2020, STR and Oxford Economics expect U.S. RevPAR to decline by 52.3%. The companies expect that demand won't return to pre-COVID levels until 2023, with ADR and RevPAR expected to take until at least 2024 to reach 2019 levels. So while things are improving, also for lodging there is a long road to recovery.

July and August certainly saw some steps in the right direction. Hotel openings is one area where things continued to improve. Data provided to Skift Research by [OTA Insight](#) shows that 62% of hotels in New York City that were operating pre-pandemic were still or again operating at the end of August, largely unchanged for the last couple of months. In London, however, 80% of pre-pandemic hotels are now open and operating, an increase of more than 10pp since the start of July.

Hotels in Chinese cities have been performing even better, benefitting from domestic travel returning to near normal conditions in China. 92% of hotels in Shanghai were open at the end of August, up from 87% at the beginning of July. In Beijing, open rates currently stand at 84%, 7% higher than at the start of summer.

This settling into some form of normality is also apparent from hotel interactions with travelers on social media. RateGain analysis of social media interactions between hotels and guests shows that there is certainly a greater drive from guests to communicate with hotels, but the nature of the questions has moved on from questions about hotel closures or cancellations, to understanding the type of measures and restrictions that are in place at the hotel.

Exhibit 10: Social media interactions are up, nature of questions changed

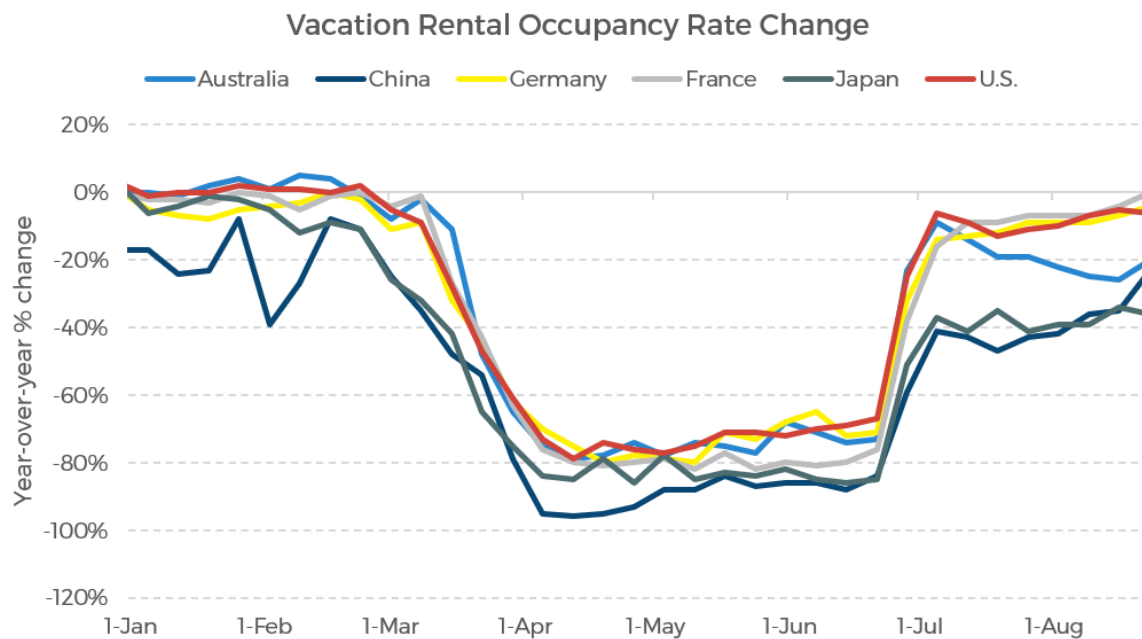


Source: RateGain. Data as of August 2020.

While hotels saw mixed performance over the summer months, with key performance indicators on average still below 50% of pre-COVID levels, vacation rentals have seen a much stronger rebound.

The positive performance for vacation rentals meant that Vrbo, the vacation rental brand of Expedia Group, went from black sheep to priced horse in a matter of months, as the brand became “the [largest contributor](#) to the improved booking trends” registered by the company during May and June, with gross bookings of the overall company up from -85% to -45%.

Data from Transparent which is used in the index shows that occupancy levels have returned to pre-COVID levels in many markets. Particularly in the U.S. and major European markets, performance has recovered since the beginning of July.

**Exhibit 11: Occupancy levels have almost completely recovered in major markets**

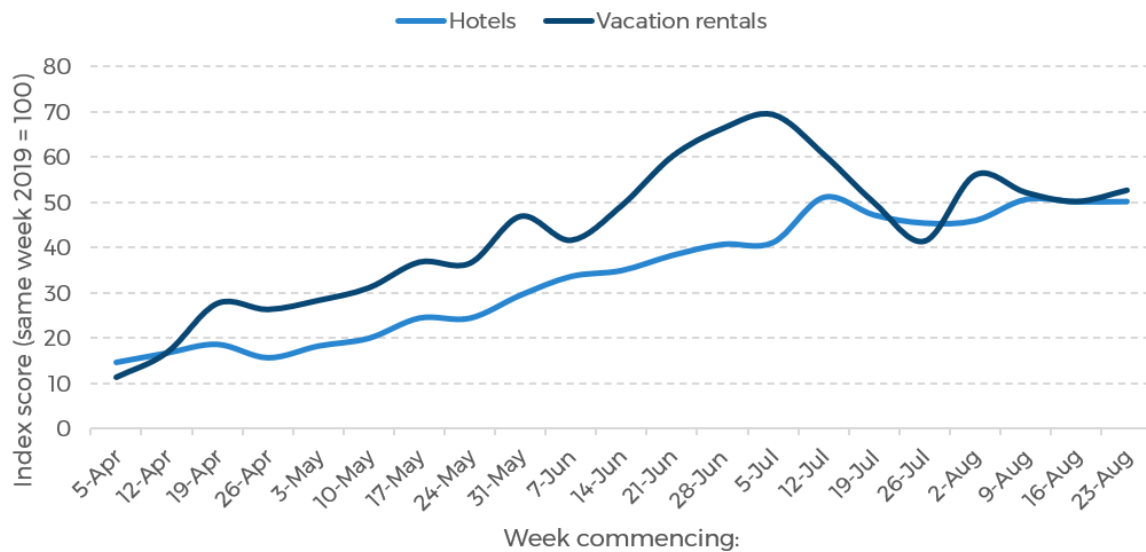
Source: Transparent. Data as of August 2020.

Yet, the recovery here is also not as straightforward as it may seem. Companies focused on predominantly urban rentals, which includes Airbnb, have suffered more than those focusing largely on rentals in more rural and secluded destinations. Vacation rentals in the centre of Amsterdam, for example, still registered [occupancies of only 25%](#) of 2019 levels in the summer months.

And when looking at booking data for future dates, it is clear that vacation rentals were in a strong position to benefit from the crisis when recovery started in April, but data from the index shows that in August new rental booking levels have dropped, and now track at around 50% of 2019 levels, similarly to hotel bookings.

## Exhibit 12: New vacation rental bookings have dropped since their initial peak

Weekly Global New Bookings for Hotels and Vacation Rentals



Source: Duetto, Hotelbeds, KeyDataDashboard, RateGain, Shiji Group, SiteMinder, Transparent, Skift Research. Data as of August 2020.

There is no doubt that vacation rentals will remain a popular accommodation option, but with the majority of hotels reopened, it seems that August might be the start of a return to some form of normality in the hotel vs. vacation rental dynamics.

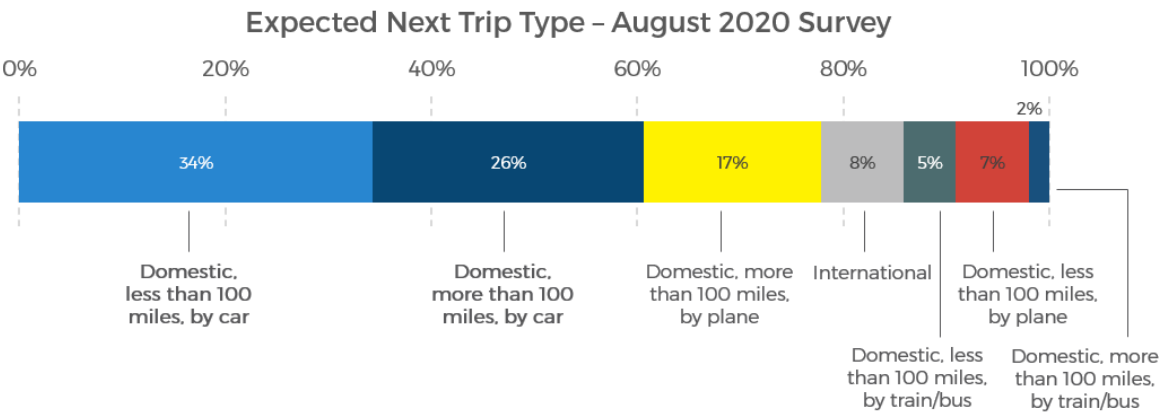
### DRIVE REMAINS AHEAD OF THE PACK

The car rental segment is interesting as it conceivably would have benefited from the strong performance of the Drive vertical, as tracked in the index. However, the trough for this sector was as deep as that of the other verticals, and with a high reliance on car rental at airports, not all companies were able to deal with the downturn. Publicly traded Hertz was forced to file for Chapter 11 bankruptcy in May, and reported that airport rentals were [down by 82%](#) during the second quarter.

[Data from RateGain](#) shows that average car rental rates in Europe have steadily increased towards the summer months, and in July 2020 were around a third higher than in July 2019. If we use pricing as a proxy for demand, this tells us that demand for car rental is indeed high. Updated analysis by [Technavio](#) expects the car rental industry to grow by 16.5% in 2020 compared to 2019, despite the downturn at the beginning of the year.

Skift Research's [Travel Tracker](#), which surveys U.S. residents about their travel behavior, also shows the car as the main form of transportation for current trips. When asked what their next trip will look like, 60% of respondents in August said it would be a trip by car.

Exhibit 13: Majority of U.S. residents looks to take next trip by car



Source: Skift Research Travel Tracker. Data as of August 2020.

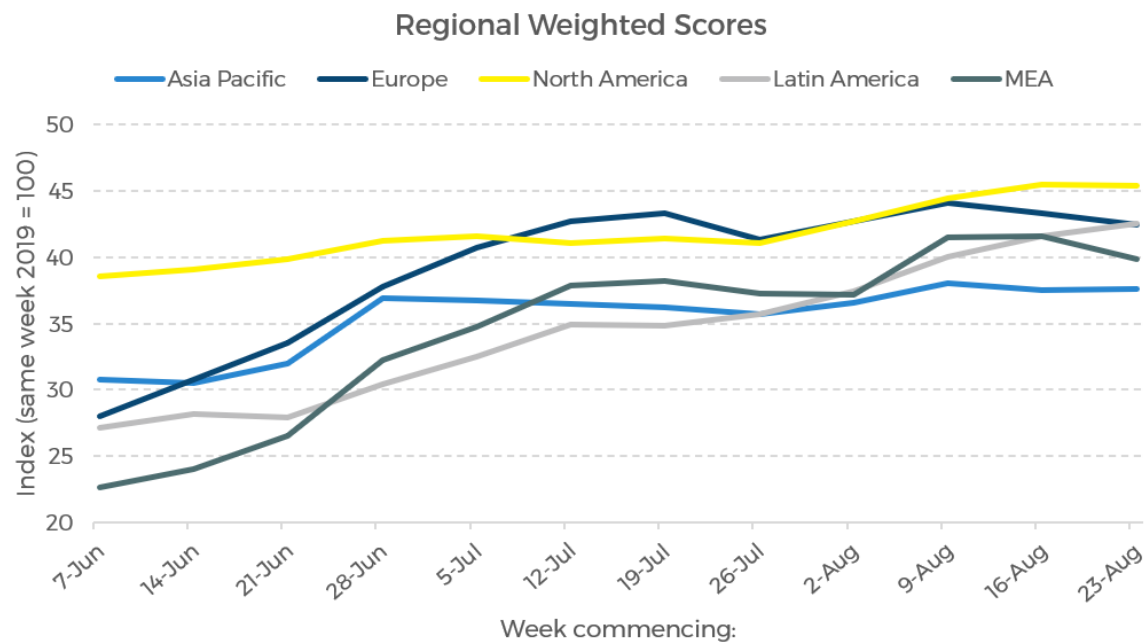
This of course, does not only benefit car rental players, as many families will travel with their own car or decide to purchase one. Indeed, 82% of respondents said they would travel with their own car on their next personal trip, with 13% looking to rent a car.

Undoubtedly, road trips will remain popular for the rest of 2020, which should aid the recovery for the car rental industry. All in all, it seems that car rental companies have opportunities to get out of this crisis ahead of the pack, although it is undeniable that their fortunes are closely linked to the airline industry recovery. On the one hand, a return of flights will decrease the demand for road trips, but on the other hand will significantly boost demand for airport rentals.

Regional Insights from the Index

Below we will have a brief look at the performance of regions and countries in the index.

Exhibit 14: Latin America shows strongest growth in August

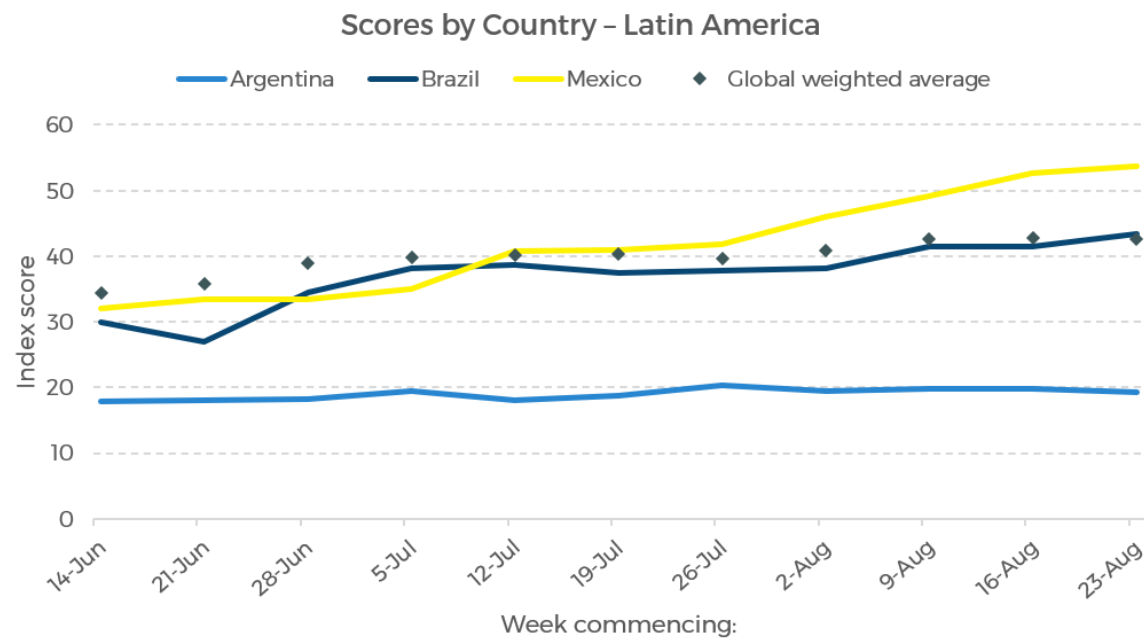


Source: Skift Research. Data as of August 2020.

LATIN AMERICA

The standout region in August was Latin America, which has seen strong growth in travel performance. Where performance growth in other regions flattened or declined, Latin America saw a 14-percentage-point growth in its index score between week 32 (Aug 2-8) and week 35 (Aug 23-30).

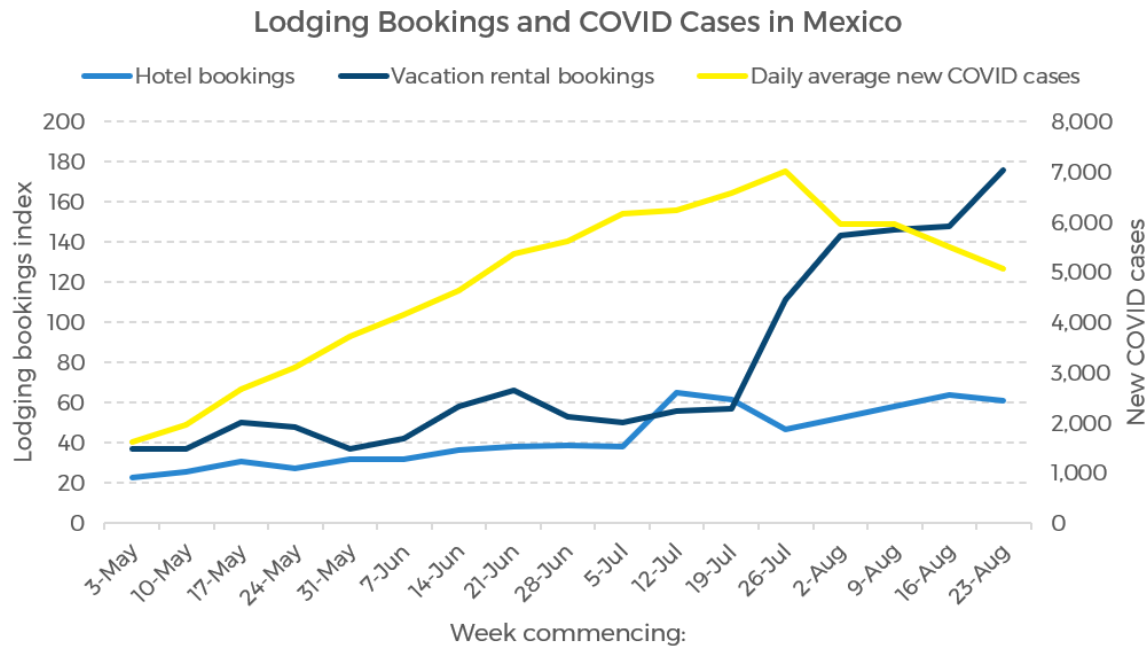
Exhibit 15: Latin American country performance



Source: Skift Research. Data as of August 2020.

The index covers the performance of Mexico, Brazil, and Argentina. Brazil reopened its borders to all international visitors on July 29, with a rise in travel performance as a result. Mexico also saw a strong rise in August, despite the land border with the U.S. remaining closed for non-essential travel. Mexico reached a peak in cases at the end of July, and new cases have since started to drop slowly. There seems to be a correlation with travel performance, as especially vacation rentals have seen a strong uptick in August.

Exhibit 16: Mexican lodging bookings up as COVID cases decline



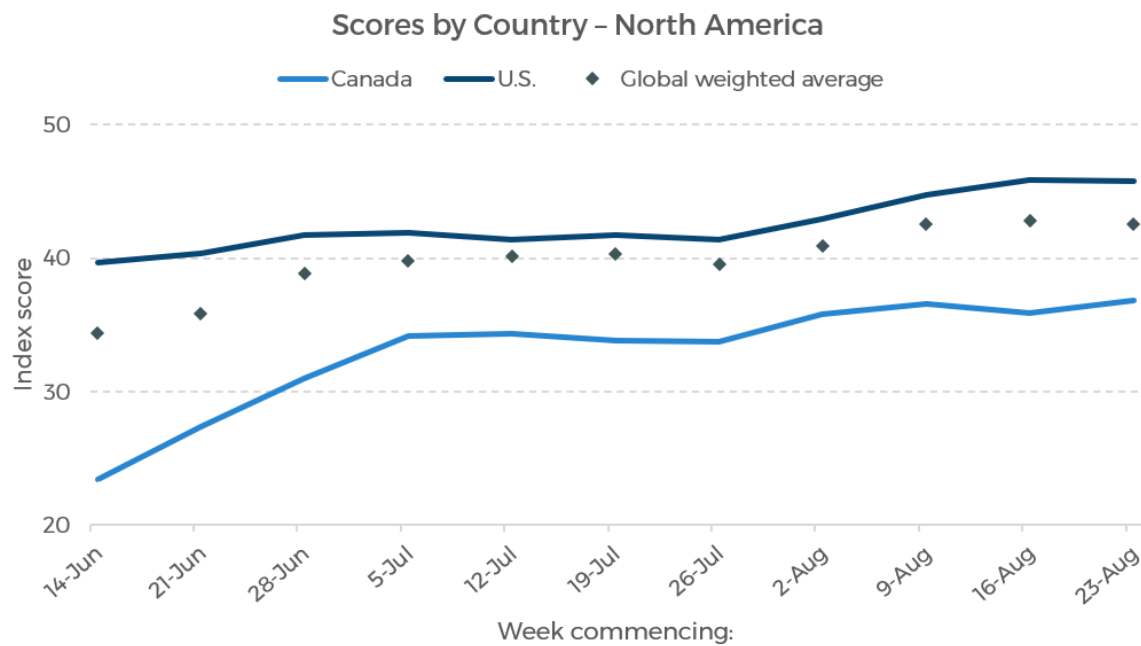
Source: Duetto, KeyDataDashboard, RateGain, SiteMinder, Skift Research. Data as of August 2020.

NORTH AMERICA

It is well documented that the U.S. is struggling with a unified response to the COVID pandemic. The country registered an initial strong recovery, as it had fewer strict lockdowns and a strong traveler base looking to travel domestically. However, over the summer months recovery has largely stalled.

Canada, which has had a stricter lockdown than its southerly neighbors, and has had a very controlled way out of lockdown, continues to see below-average performance. The country remains closed to all foreign tourists with no reopening date known as yet.

Exhibit 17: Slow upward slope in U.S. and Canada



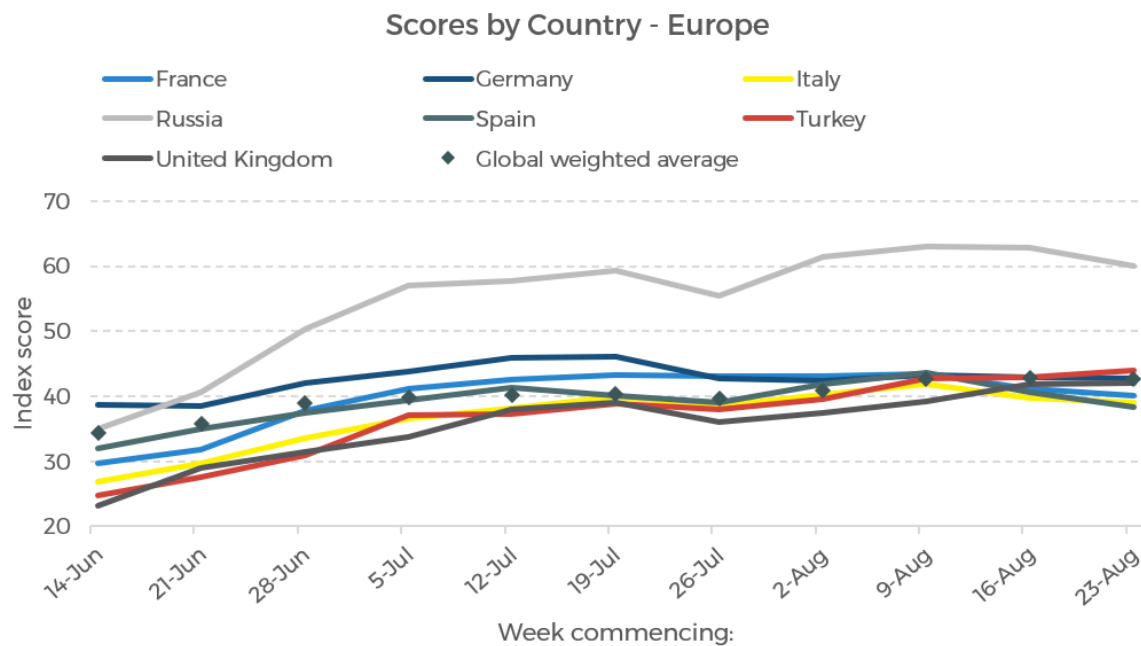
Source: Skift Research. Data as of August 2020.

EUROPE

Also in Europe, recovery has been dampened during July and August, despite an initial surge in performance in June when borders reopened. Recovery has been patchwork in Europe, with internal EU borders theoretically open to visitors, but with many exceptions and last-minute changes in travel advice as the COVID situation keeps changing. This has resulted in uncertainty amongst travelers, many of whom will opt to stay in their own country. For a region so reliant on international arrivals, this is felt particularly during the summer months.

Countries that fall outside the European Union are taking slightly different approaches. Turkey has reopened to international travelers from almost all countries. Russia reopened to a few countries, including the United Kingdom and Switzerland, from August 1, and is set to open to more countries in September. The UK has its own list of safe-travel destinations.

Exhibit 18: Most countries’ performance remains level

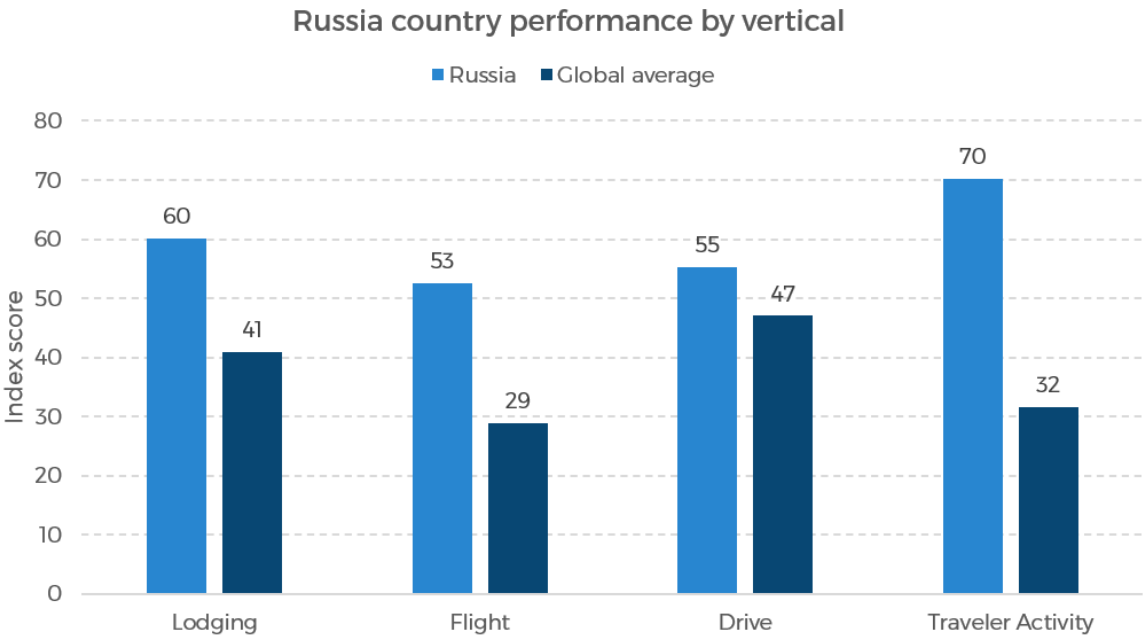


Source: Skift Research. Data as of August 2020.

July and August are normally bumper months for countries like France, Spain and Italy. These countries have all shown a slight decline in their index score, because they were unable to register the same growth as they would normally do in the summer months. France and Spain have also struggled with increasing new COVID cases as they opened their borders to summer vacationers, which has led to some countries changing their travel advice.

Russia is the standout performer in Europe. It is the strongest performer globally of any country we track in the recovery index, standing at over 60% performance. The country is seeing an above-average score for both flight and lodging, with domestic flight RPK back to 83% of 2019 levels as mentioned before. What particularly stands out is the strong traveler activity score, which captures Russian residents’ travel searches and bookings, and makes up a quarter of the total score. At present, Russians really want to travel!

Exhibit 19: Russians’ traveler intent is high



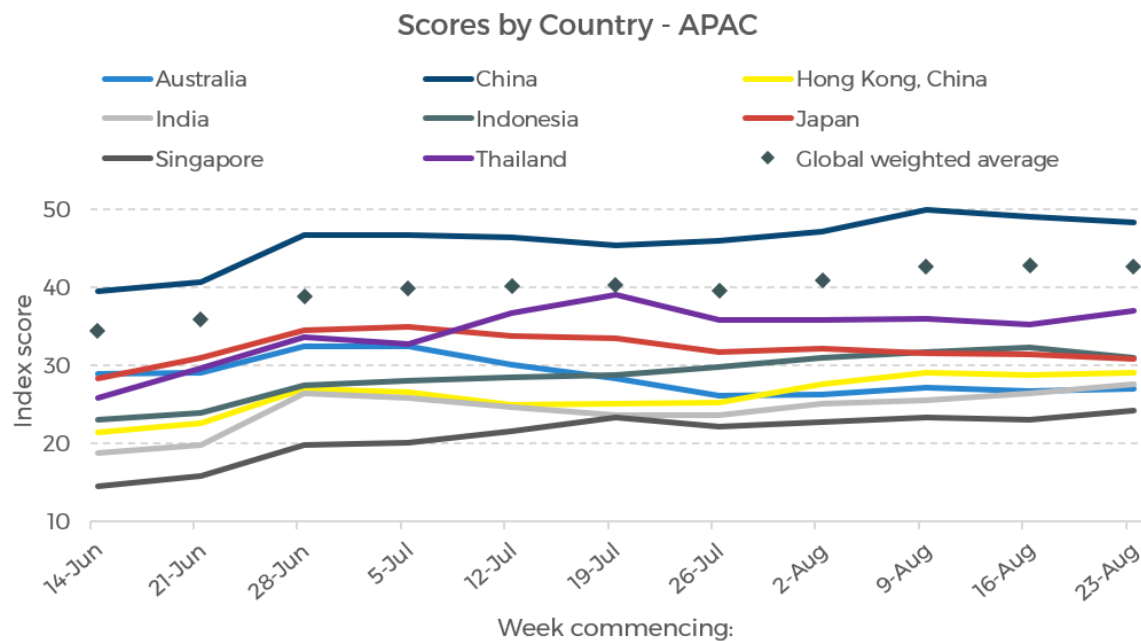
Source: Skift Research

ASIA PACIFIC

In Asia Pacific, China remains the only country tracking above the global average, largely thanks to a largely successful response to the spread of COVID initially, and a strong domestic traveler base to boost its performance. Most countries in this region remain closed to international tourists.

Australia saw some consistent declines in July as cases flared up, but its performance has now flattened out. Country borders remain closed for foreign travelers, so the Australian travel industry needs to rely on domestic tourism only.

Exhibit 20: Asia Pacific country performance

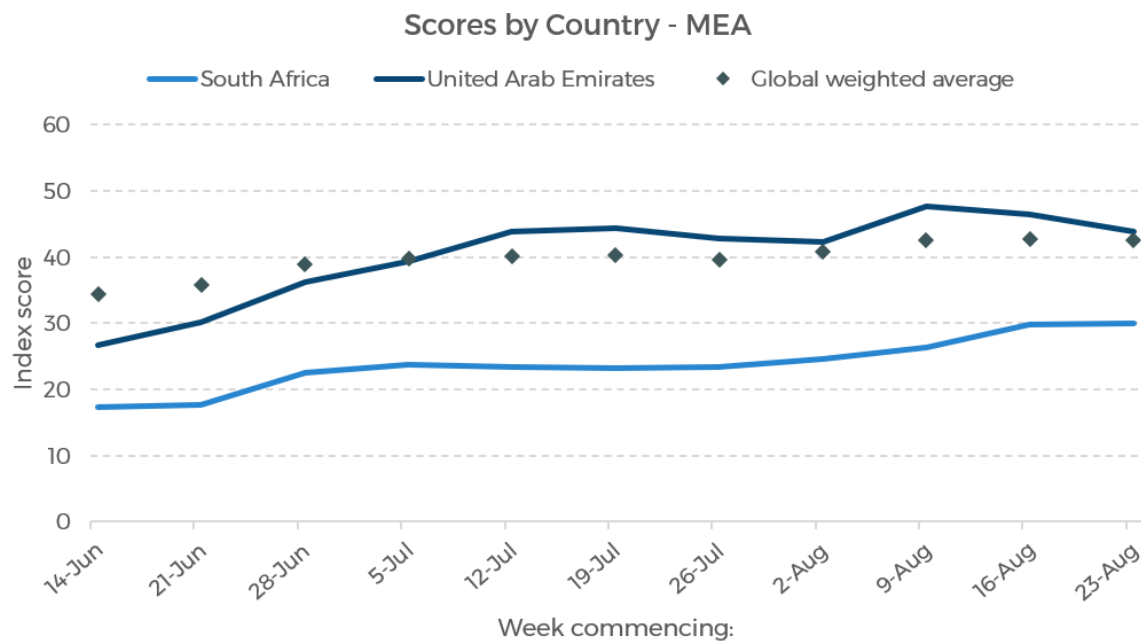


Source: Skift Research. Data as of August 2020.

MIDDLE EAST AND AFRICA

The index tracks two countries in the MEA region - South Africa and the UAE. Both countries have seen slow progress over the past months, although this seems to have stalled in the UAE in the second half of August. While the UAE has opened up to tourists, South Africa remains closed to all foreign tourists.

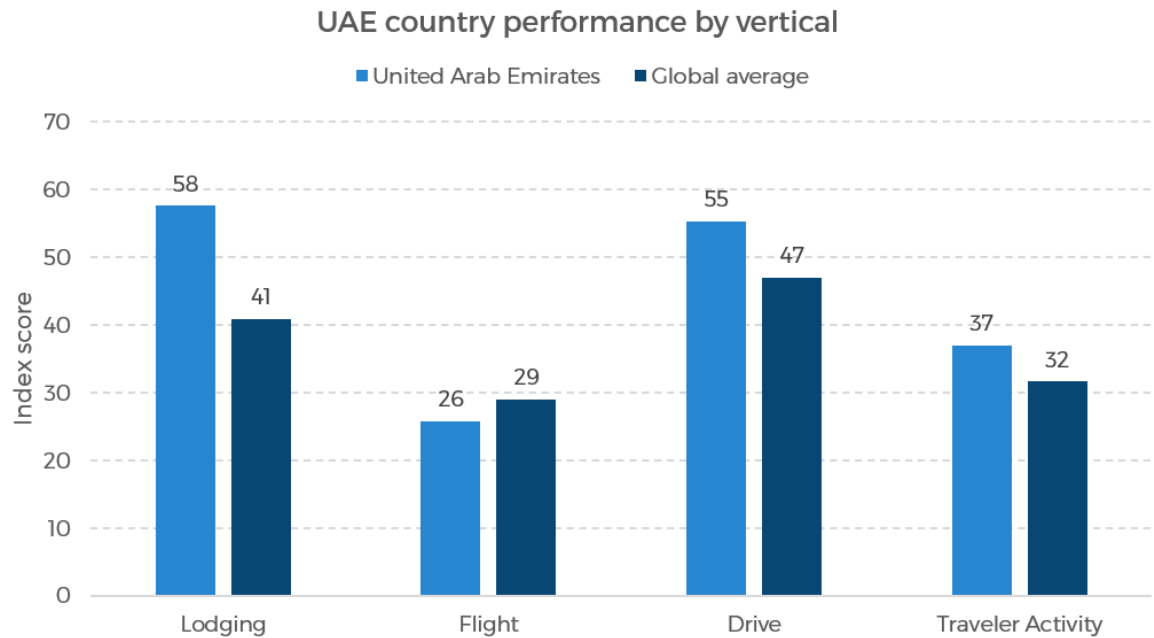
Exhibit 21: Middle East and Africa country performance



Source: Skift Research. Data as of August 2020.

The UAE reopened to foreign travelers at the beginning of August, requiring a negative COVID test result upon arrival at the airport. The relatively strong travel performance, which is above the global average, is predominantly down to a [surge in hotel demand](#).

Exhibit 22: UAE hotels boost travel recovery



Source: Skift Research. Bars show average index scores for month of August.

COUNTRY BY COUNTRY PERFORMANCE

Exhibit 23: Travel performance in August by country

Country	Current score (w/c Aug 23)	Lowest score (since Jan 1)	Highest score (since April 5)	Week-over-week change			
				2 Aug	9 Aug	16 Aug	23 Aug
Asia Pacific							
China	48	23	50	<div><div></div></div> 2%	<div><div></div></div> 6%	<div><div></div></div> -2%	<div><div></div></div> -1%
Thailand	37	15	39	<div><div></div></div> 0%	<div><div></div></div> 1%	<div><div></div></div> -2%	<div><div></div></div> 5%
Indonesia	31	23	32	<div><div></div></div> 4%	<div><div></div></div> 2%	<div><div></div></div> 2%	<div><div></div></div> -4%
Japan	31	19	35	<div><div></div></div> 1%	<div><div></div></div> -2%	<div><div></div></div> -1%	<div><div></div></div> -2%
Hong Kong	29	16	29	<div><div></div></div> 9%	<div><div></div></div> 5%	<div><div></div></div> -1%	<div><div></div></div> 1%
India	28	13	28	<div><div></div></div> 6%	<div><div></div></div> 2%	<div><div></div></div> 3%	<div><div></div></div> 5%
Australia	27	15	33	<div><div></div></div> 1%	<div><div></div></div> 3%	<div><div></div></div> -2%	<div><div></div></div> 1%
Singapore	24	10	24	<div><div></div></div> 3%	<div><div></div></div> 2%	<div><div></div></div> -1%	<div><div></div></div> 5%

Europe							
Russia	60	18	63	↑ 11%	↑ 3%	→ 0%	↓ -5%
Turkey	44	13	44	↑ 4%	↑ 8%	→ 0%	↑ 3%
Germany	43	15	46	↓ -1%	↑ 2%	↓ -1%	→ 0%
UK	42	14	42	↑ 4%	↑ 5%	↑ 7%	→ 0%
France	40	12	44	→ 0%	↑ 1%	↓ -6%	↓ -3%
Italy	39	11	42	↑ 5%	↑ 4%	↓ -5%	↓ -2%
Spain	38	14	44	↑ 7%	↑ 4%	↓ -7%	↓ -5%

North America							
U.S.	46	15	46	↑ 4%	↑ 4%	↑ 3%	→ 0%
Canada	37	13	37	↑ 6%	↑ 2%	↓ -2%	↑ 3%

Latin America							
Mexico	54	21	54	↑ 10%	↑ 7%	↑ 7%	↑ 2%
Brazil	43	17	43	↑ 1%	↑ 8%	→ 0%	↑ 5%
Argentina	19	15	20	↓ -5%	↑ 1%	→ 0%	↓ -3%

Middle East							
UAE	44	17	48	↓ -1%	↑ 13%	↓ -3%	↓ -6%
South Africa	30	13	30	↑ 5%	↑ 7%	↑ 13%	↑ 1%

# DATA PARTNERS

We would like to thank the following partners who are collaborating with Skift Research by providing their data which shapes the Skift Recovery Index.

**AMADEUS** is a global travel technology leader that delivers the most trusted, critical systems across the travel industry to airlines, airports, hotels, travel agents, and car rental and railway providers. Amadeus is providing insight on travel search trends and behavior for the Skift Recovery Index.

**ARRIVALIST** uses mobile location datasets to provide actionable insights on consumer behavior, competitive share, media effectiveness, and market trends, and has been [tracking driving behavior](#) of U.S. residents, which we have included in the Index.

**AVIASALES** was launched as a blog on bargain air tickets in 2007 and grew out to become the world's biggest independent travel search. Aviasales serves 20 million monthly active users from Eastern Europe & Central Asia, and provides flight and hotel booking data for Russian travelers for the index.

**COLLINSON** is a global travel services business, creating traveler experiences, loyalty strategy and programs, travel insurance, and travel and medical assistance. Priority Pass is operated by Collinson and provides frequent travelers access to over 1,300 lounges, with Collinson providing aggregated customer lounge visit data for the index.

**CRITEO** is a global technology company powering the world's marketers with trusted and impactful advertising. The company provides indexed data from various OTA, airline, and car rental partners. Criteo provides data for airline and car rental web traffic and sales.

**DUETTO** delivers a suite of cloud applications to simplify hospitality revenue decisions and allow hoteliers to work smarter, increasing organizational efficiency, revenue, and profitability. More than 4,000 hotel and casino resort properties in more than 60 countries have partnered to use Duetto's applications. Duetto provides hotel bookings and cancellations data.

**HOTELBEDS** provides over 180,000 hotels across the globe with access to high-value, complementary distribution channels that do not compete with the hotelier's direct distribution strategy. The company provides data on hotel bookings and source market performance.

**KEY DATA DASHBOARD** is a provider of real-time, direct-source vacation rental data for the short-term rental sector, aggregating data sourced directly from more than 30+ reservation systems of 700+ professional property managers around the world. Key Data provides bookings, RevPAR and cancellations data for the Skift Recovery Index.

**OAG** collects and analyzes data about every journey, every booking, every take-off and landing, departure, and delay, totalling over 110,000 flights, 100,000 schedule changes daily and over 4 million flight status updates. OAG provides flight capacity data for the Skift

Recovery Index.

**ONYX CENTERSOURCE** is a leading global provider of business-to-business payments and business intelligence solutions to the hospitality industry. With a legacy dating to 1992, the company facilitates in excess of \$2.1 billion in payments annually, and partners with more than 150,000 hotel properties. The company provides hotel stay, cancellations, and commission data.

**RATEGAIN** helps travel and hospitality companies with cognitive revenue management, smart e-distribution, and brand engagement. RateGain supports over 250,000 hotel properties globally by providing 240 billion rate and availability updates, and powering over 30 million bookings. For the Index, RateGain provides hotel bookings and cancellation data.

**SHIJI GROUP** provides software solutions and services for the hospitality, food service, retail, and entertainment industries, serving over 74,000 hotels, 200,000 restaurants and 600,000 retail outlets across the world. Shiji Group provides China hotel bookings and room night data for the Skift Recovery Index.

**SIMILARWEB** gathers digital data from multiple sources, including first-party direct measurement, public data sources, anonymous behavioral data, and external partners. For the Index, SimilarWeb provides unique visitor data to the top 10 travel websites per country.

**SITEMINDER** works with over 35,000 hotels as their guest acquisition platform to generate in excess of 100 million reservations worth over US\$35 billion in revenue for hotels each year. SiteMinder provides hotel booking data for the Skift Recovery Index, pulled from its [World Hotel Index](#).

**SKYSCANNER** has 100 million peak monthly active users, over 100 million app downloads, and more than 1,200 partners across flights, hotels, car rental, and more. Skyscanner's [Travel Insight](#) product helps companies guide their COVID-19 recovery plans, and the company contributes flight search data from Travel Insight for the Skift Recovery Index.

**SOJERN** provides digital marketing solutions for the travel industry, helping to drive direct demand for more than 10,000 hotels, attractions, tourism boards, and travel marketers. Sojern contributes flight and hotel search data for the Skift Recovery Index.

**TRANSPARENT** provides business intelligence serving the vacation rental industry, including insights around supply growth, demand patterns, rate changes, and property manager activities. Transparent contributes occupancy and bookings data for the Skift Recovery Index. The company draws on data from the 34 million vacation rental listings they track worldwide, in every geography.

**TRUSTYOU** provides a guest feedback platform that makes listening to customers easy, powerful, and actionable. In response to the current crisis, TrustYou has put together a [Travel Health Index](#), using hotel reviews managed through its platform as a proxy for hotel occupancy. TrustYou's Travel Health Index is integrated in the Skift Recovery Index.

We would welcome more partners who want to join this effort, especially in the drive (car rental) and tours and activities space. Please [get in touch](#) to talk about a possible

collaboration.

DATA TABLES

Total Skift Recovery Index (SRI) Score by Country

Country/Week	28	29	30	31	32	33	34	35
Argentina	19.4	18.0	18.8	20.4	19.5	19.8	19.9	19.2
Australia	32.4	30.1	28.4	26.1	26.3	27.2	26.7	27.1
Brazil	38.1	38.6	37.5	37.8	38.2	41.4	41.4	43.4
Canada	34.2	34.3	33.8	33.7	35.8	36.6	35.9	36.9
China	46.6	46.3	45.4	46.0	47.1	49.9	49.0	48.3
France	41.1	42.6	43.3	43.1	43.0	43.5	41.1	40.0
Germany	43.8	45.9	46.0	42.7	42.3	43.2	43.0	42.8
Hong Kong, China	26.5	25.0	25.1	25.3	27.6	29.1	28.7	29.1
India	25.9	24.6	23.6	23.7	25.0	25.6	26.4	27.7
Indonesia	28.1	28.5	28.7	29.8	31.0	31.7	32.3	30.9
Italy	36.6	38.1	39.9	38.5	40.3	41.8	39.8	39.0
Japan	34.9	33.8	33.4	31.7	32.1	31.6	31.4	30.8
Mexico	35.0	40.7	41.0	41.9	45.9	49.2	52.7	53.7
Russia	57.0	57.7	59.3	55.5	61.5	63.1	62.8	60.0
Singapore	20.1	21.6	23.4	22.2	22.8	23.4	23.1	24.2
South Africa	23.8	23.4	23.2	23.4	24.6	26.3	29.7	30.0
Spain	39.3	41.3	40.0	39.0	41.8	43.5	40.6	38.4
Thailand	32.7	36.7	39.0	35.8	35.7	36.0	35.2	37.0
Turkey	37.1	37.3	38.9	38.0	39.6	42.8	42.8	44.0
U.S.	41.9	41.4	41.7	41.4	43.0	44.8	45.9	45.8
United Arab Emirates	39.3	43.8	44.4	42.9	42.3	47.7	46.4	43.9
United Kingdom	33.8	38.0	39.1	36.1	37.5	39.3	41.9	42.1

Destination Scores by Country

Country/Week	28	29	30	31	32	33	34	35
Argentina	17%	16%	17%	18%	18%	18%	18%	18%
Australia	35%	32%	30%	27%	28%	29%	28%	28%
Brazil	40%	41%	39%	39%	40%	43%	43%	45%
Canada	35%	36%	34%	34%	37%	38%	37%	37%
China	53%	54%	52%	53%	54%	58%	57%	56%
France	40%	41%	42%	42%	41%	41%	39%	38%
Germany	41%	43%	43%	40%	40%	42%	42%	42%
Hong Kong, China	28%	27%	27%	27%	30%	31%	30%	31%
India	27%	26%	24%	24%	25%	25%	26%	28%
Indonesia	29%	28%	28%	29%	30%	30%	31%	29%
Italy	33%	35%	37%	36%	38%	40%	39%	39%
Japan	34%	33%	32%	31%	32%	31%	31%	30%
Mexico	35%	41%	41%	42%	47%	50%	53%	54%
Russia	54%	54%	55%	51%	59%	59%	59%	56%
Singapore	21%	21%	22%	21%	22%	23%	22%	24%
South Africa	23%	23%	22%	23%	24%	26%	30%	30%
Spain	39%	42%	41%	39%	41%	42%	39%	37%
Thailand	29%	29%	29%	27%	27%	26%	27%	29%
Turkey	36%	38%	38%	37%	40%	44%	44%	45%
U.S.	44%	44%	43%	42%	45%	46%	46%	46%
United Arab Emirates	40%	45%	44%	43%	43%	47%	47%	45%
United Kingdom	30%	34%	34%	33%	35%	36%	38%	38%

Destination Performance indicators contribute 75% to the total score. The scores in this table have been adjusted to 100% to give a better insight into performance

## Origin Scores by Country

Country/Week	28	29	30	31	32	33	34	35
Argentina	26%	23%	23%	28%	24%	26%	26%	24%
Australia	27%	25%	24%	24%	23%	24%	24%	23%
Brazil	31%	32%	33%	34%	33%	36%	37%	38%
Canada	34%	34%	35%	36%	38%	35%	37%	38%
China	26%	24%	25%	25%	26%	29%	28%	27%
France	48%	48%	48%	47%	49%	50%	47%	45%
Germany	52%	53%	56%	50%	48%	48%	46%	45%
Hong Kong, China	22%	21%	21%	20%	22%	24%	24%	24%
India	23%	22%	22%	22%	24%	27%	28%	27%
Indonesia	26%	29%	31%	33%	35%	37%	36%	36%
Italy	48%	49%	50%	48%	49%	49%	44%	42%
Japan	37%	38%	38%	35%	34%	34%	34%	34%
Mexico	41%	46%	46%	45%	46%	48%	54%	54%
Russia	67%	68%	72%	70%	69%	76%	74%	71%
Singapore	19%	23%	28%	25%	24%	25%	26%	25%
South Africa	25%	25%	27%	26%	25%	27%	30%	30%
Spain	43%	43%	43%	44%	49%	52%	48%	45%
Thailand	45%	60%	69%	62%	62%	65%	61%	61%
Turkey	40%	36%	43%	40%	38%	38%	40%	42%
U.S.	40%	40%	42%	43%	44%	46%	48%	49%
United Arab Emirates	37%	40%	46%	43%	41%	50%	46%	42%
United Kingdom	46%	50%	54%	45%	45%	48%	53%	54%

Origin Performance indicators contribute 25% to the total score. The scores in this table have been adjusted to 100% to give a better insight into performance

## Macroeconomics Scores by Country

Country/Week	28	29	30	31	32	33	34	35
Argentina	72%	75%	75%	75%	74%	74%	74%	74%
Australia	72%	75%	75%	75%	74%	74%	74%	74%
Brazil	80%	83%	83%	83%	82%	82%	82%	82%
Canada	61%	64%	64%	64%	63%	63%	63%	63%
China	80%	77%	77%	77%	78%	78%	78%	78%
France	96%	96%	96%	96%	97%	97%	97%	97%
Germany	101%	101%	101%	101%	102%	102%	102%	102%
Hong Kong, China	64%	64%	64%	64%	65%	65%	65%	65%
India	75%	75%	75%	75%	73%	73%	73%	73%
Indonesia	91%	91%	91%	91%	90%	90%	90%	90%
Italy	107%	109%	109%	109%	108%	108%	108%	108%
Japan	93%	96%	96%	96%	95%	95%	95%	95%
Mexico	99%	99%	99%	99%	98%	98%	98%	99%
Russia	85%	85%	85%	85%	85%	85%	85%	85%
Singapore	72%	72%	72%	72%	72%	72%	72%	72%
South Africa	77%	77%	77%	77%	76%	76%	76%	76%
Spain	93%	96%	96%	96%	95%	95%	95%	95%
Thailand	77%	77%	77%	77%	76%	76%	76%	76%
Turkey	93%	93%	93%	93%	94%	94%	94%	94%
U.S.	80%	80%	80%	80%	80%	80%	80%	80%
United Arab Emirates	91%	91%	91%	91%	91%	91%	91%	91%
United Kingdom	93%	93%	93%	93%	94%	94%	94%	94%

Macroeconomics are a subsection of Origin Performance, and contribute 3.75% to the total score. The scores in this table have been adjusted to 100% to give a better insight into performance

## Traveler Activity Scores by Country

Country/Week	28	29	30	31	32	33	34	35
Argentina	17%	14%	14%	20%	16%	17%	17%	15%
Australia	18%	16%	16%	15%	14%	15%	15%	14%
Brazil	23%	23%	24%	26%	25%	28%	29%	30%
Canada	29%	29%	30%	31%	33%	30%	32%	34%
China	16%	15%	16%	16%	17%	20%	19%	17%
France	40%	39%	40%	39%	40%	42%	38%	36%
Germany	43%	45%	48%	41%	39%	39%	37%	35%
Hong Kong, China	14%	13%	13%	13%	14%	17%	16%	16%
India	14%	13%	13%	13%	15%	19%	19%	19%
Indonesia	15%	18%	21%	23%	26%	28%	27%	27%
Italy	38%	38%	40%	37%	38%	39%	32%	30%
Japan	27%	27%	29%	25%	23%	24%	23%	23%
Mexico	31%	37%	37%	36%	37%	39%	46%	46%
Russia	64%	65%	71%	67%	66%	74%	72%	69%
Singapore	9%	14%	20%	17%	16%	17%	17%	16%
South Africa	16%	16%	18%	17%	16%	19%	21%	22%
Spain	34%	33%	34%	35%	41%	45%	40%	37%
Thailand	39%	57%	68%	60%	59%	63%	58%	58%
Turkey	31%	26%	34%	31%	28%	28%	30%	33%
U.S.	34%	33%	36%	36%	38%	40%	43%	44%
United Arab Emirates	27%	31%	38%	35%	32%	43%	38%	33%
United Kingdom	37%	43%	47%	36%	37%	40%	46%	47%

Traveler Activity are a subsection of Origin Performance, and contribute 21.25% to the total score. The scores in this table have been adjusted to 100% to give a better insight into performance

## Lodging Scores by Country

Country/Week	28	29	30	31	32	33	34	35
Argentina	11%	10%	10%	12%	12%	11%	11%	12%
Australia	46%	41%	38%	32%	34%	35%	34%	34%
Brazil	46%	47%	41%	42%	42%	47%	46%	51%
Canada	45%	46%	43%	42%	48%	49%	47%	47%
China	63%	63%	60%	62%	64%	70%	68%	66%
France	45%	48%	48%	46%	45%	44%	42%	40%
Germany	46%	50%	48%	45%	45%	45%	45%	47%
Hong Kong, China	38%	35%	36%	36%	41%	43%	42%	43%
India	31%	29%	26%	27%	28%	27%	29%	33%
Indonesia	32%	30%	29%	30%	31%	31%	33%	31%
Italy	32%	36%	37%	35%	37%	39%	39%	39%
Japan	38%	35%	33%	31%	33%	32%	32%	31%
Mexico	34%	45%	44%	45%	52%	59%	64%	66%
Russia	56%	57%	57%	50%	64%	63%	63%	58%
Singapore	25%	27%	28%	26%	28%	29%	28%	32%
South Africa	27%	26%	24%	26%	29%	32%	37%	38%
Spain	43%	47%	43%	40%	42%	42%	38%	36%
Thailand	36%	36%	36%	32%	32%	30%	31%	35%
Turkey	37%	40%	37%	36%	40%	46%	45%	48%
U.S.	56%	54%	52%	51%	55%	56%	57%	57%
United Arab Emirates	50%	59%	57%	56%	55%	61%	58%	55%
United Kingdom	29%	35%	34%	34%	36%	37%	39%	39%

Lodging is a subsection of Destination Performance, and contributes 41.25% to the total score. The scores in this table have been adjusted to 100% to give a better insight into performance

## Flight Scores by Country

Country/Week	28	29	30	31	32	33	34	35
Argentina	22%	21%	21%	21%	20%	20%	21%	20%
Australia	22%	22%	22%	21%	21%	22%	22%	21%
Brazil	32%	32%	32%	32%	34%	34%	35%	36%
Canada	20%	20%	20%	20%	20%	21%	21%	21%
China	45%	45%	46%	45%	44%	45%	46%	45%
France	31%	32%	33%	34%	36%	36%	35%	34%
Germany	29%	29%	30%	30%	31%	32%	31%	30%
Hong Kong, China	16%	15%	15%	15%	15%	15%	15%	15%
India	23%	22%	22%	21%	23%	23%	23%	22%
Indonesia	25%	27%	27%	28%	29%	29%	29%	27%
Italy	32%	33%	34%	35%	37%	37%	36%	35%
Japan	31%	31%	31%	31%	30%	31%	30%	29%
Mexico	34%	34%	35%	35%	37%	35%	36%	37%
Russia	50%	50%	51%	51%	53%	53%	54%	54%
Singapore	14%	13%	14%	14%	14%	14%	14%	14%
South Africa	15%	14%	14%	14%	14%	14%	15%	16%
Spain	33%	34%	35%	34%	38%	38%	37%	36%
Thailand	20%	20%	20%	20%	21%	21%	21%	21%
Turkey	33%	34%	35%	35%	37%	38%	38%	38%
U.S.	28%	28%	28%	28%	28%	29%	30%	30%
United Arab Emirates	25%	25%	25%	23%	25%	26%	29%	28%
United Kingdom	26%	27%	28%	29%	30%	31%	32%	32%

Flight is a subsection of Destination Performance, and contributes 30% to the total score. The scores in this table have been adjusted to 100% to give a better insight into performance

## Drive Scores by Country

Country/Week	28	29	30	31	32	33	34	35
Argentina	51%	51%	64%	61%	62%	73%	71%	61%
Australia	21%	21%	21%	21%	21%	21%	20%	21%
Brazil	51%	51%	64%	61%	62%	73%	71%	61%
Canada	48%	45%	51%	48%	42%	49%	54%	54%
China	21%	21%	21%	21%	21%	21%	20%	21%
France	56%	51%	56%	51%	49%	55%	51%	46%
Germany	80%	85%	88%	72%	65%	77%	90%	82%
Hong Kong, China	21%	21%	21%	21%	21%	21%	20%	21%
India	21%	21%	21%	21%	21%	21%	20%	21%
Indonesia	21%	21%	21%	21%	21%	21%	20%	21%
Italy	51%	51%	64%	61%	62%	73%	71%	61%
Japan	21%	21%	21%	21%	21%	21%	20%	21%
Mexico	51%	51%	64%	61%	62%	73%	71%	61%
Russia	53%	56%	61%	53%	49%	57%	61%	56%
Singapore	21%	21%	21%	21%	21%	21%	20%	21%
South Africa	53%	56%	61%	53%	49%	57%	61%	56%
Spain	51%	51%	64%	61%	62%	73%	71%	61%
Thailand	21%	21%	21%	21%	21%	21%	20%	21%
Turkey	51%	51%	64%	61%	62%	73%	71%	61%
U.S.	59%	56%	59%	59%	55%	61%	65%	60%
United Arab Emirates	53%	56%	61%	53%	49%	57%	61%	56%
United Kingdom	72%	77%	80%	64%	57%	69%	81%	72%

Drive is a subsection of Destination Performance, and contributes 3.75% to the total score. The scores in this table have been adjusted to 100% to give a better insight into performance

# ABOUT SKIFT

Skift is the largest intelligence platform in travel, providing media, insights and marketing to key industry sectors.

## THE SKIFT RESEARCH DIFFERENCE

Skift Research is the official research arm of Skift. Our reporting combines:

- Skift's extensive industry experience
- Rigorous financial & quantitative analysis
- Qualitative insights from top executives at nearly every major travel company

We conduct primary research, summarize our findings through desk analysis, and present them back to you in a digestible format which you can take to your team, partners, and clients to understand the market and make decisions.

Using our proprietary blend of qualitative and quantitative analysis, Skift Research closes the information gap faced by businesses today.

Contact us at [research@skift.com](mailto:research@skift.com)!