



SKIFT RECOVERY INDEX

WEEK OF JULY 5

SKIFT RESEARCH TAKE



by + Skift Team
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REPORT OVERVIEW

This report highlights the latest insights from the Skift Recovery Index, as we have added data for July 5 to July 11. The total available dataset now spans from December 29th, 2019 to July 11th, 2020 (weeks 1 to 28).

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.

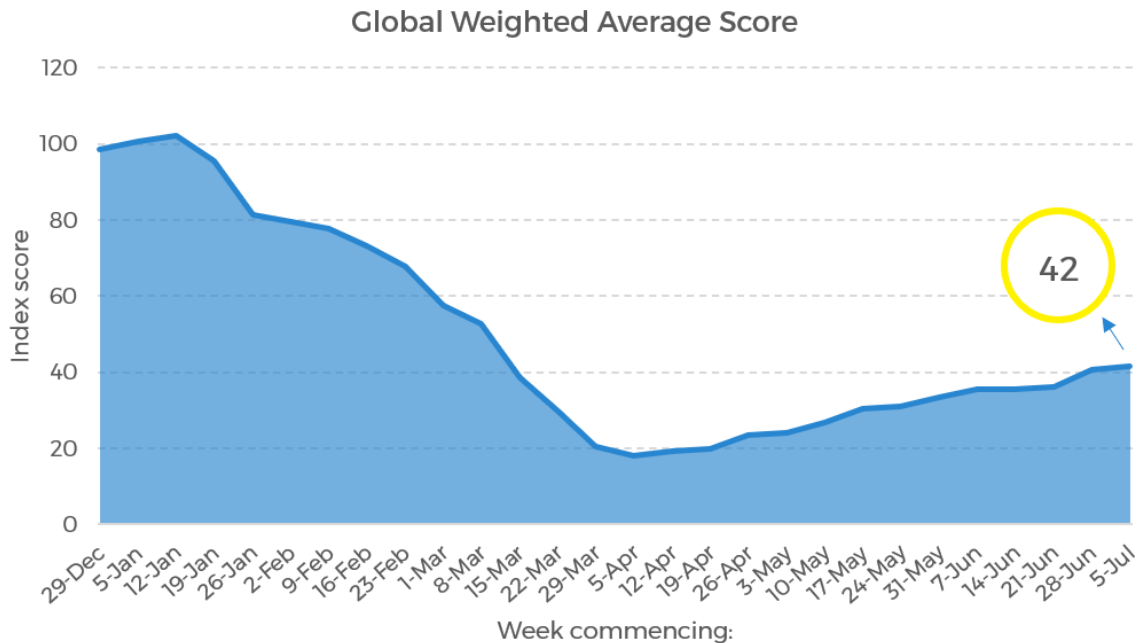
We are working with [Amadeus](#), [Arrivalist](#), [Collinson](#), [Criteo](#), [Duetto](#), [Hotelbeds](#), [Key Data Dashboard](#), [OAG](#), [RateGain](#), [Shiji Group](#), [SimilarWeb](#), [SiteMinder](#), [Skyscanner](#), [Sojern](#), [Transparent](#), and [TrustYou](#) as data partners for the Skift Recovery Index.

We remain open to adding additional partners, especially in the drive (car rental) and tours and activities space. Please get in touch at research@skift.com if you'd like to contribute.

Overall Rise in Performance, Asia Stalls

The global weighted index now stands at 42, representing 42% of the travel industry performance at this time last year.

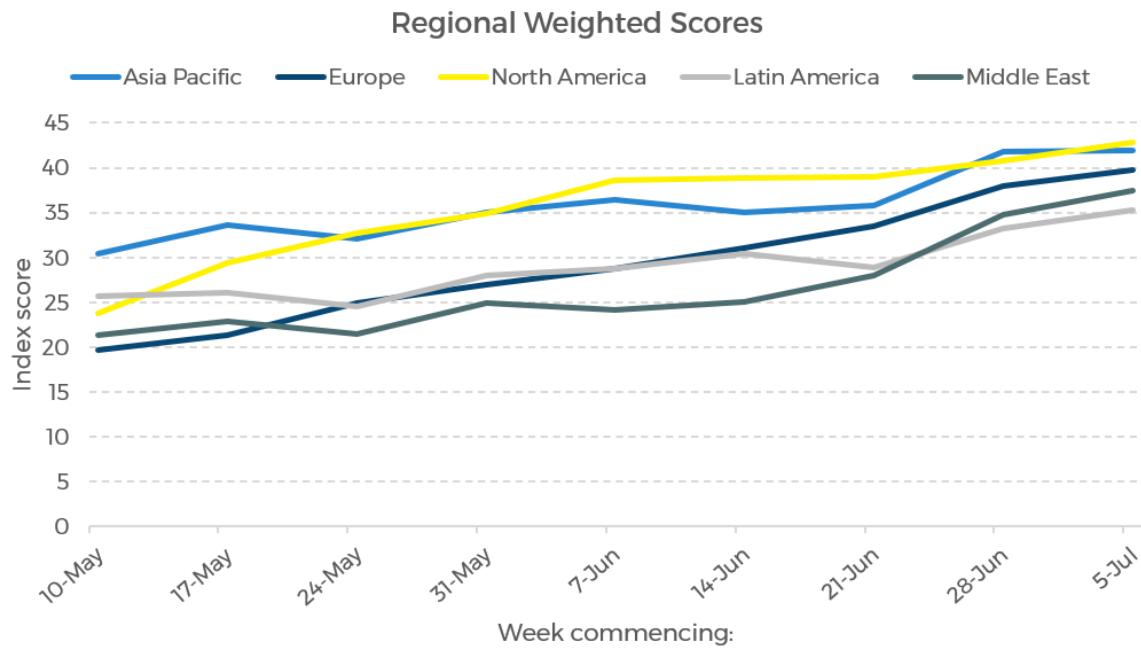
Exhibit 1: Travel performance up another 2%



Source: Skift Research

Travel recovery in Asia Pacific came to a halt last week, as India has reinstated lockdowns in parts of the country, parts of Australia are registering their highest daily increases in cases, and Singapore announced its GDP contracted by 41.2% in Q2, compared to the first quarter.

Exhibit 2: Asia Pacific recovery has stalled



Source: Skift Research

When we look at the country level, all countries in Europe maintained their positive course, although the United Kingdom couldn't match the strong performance it has shown in previous weeks.

After dips, North America and Latin America are registering surprisingly positive performance in the past week, despite major increases in coronavirus cases in countries like the U.S. and Brazil.

Exhibit 3: Europe remains "green"

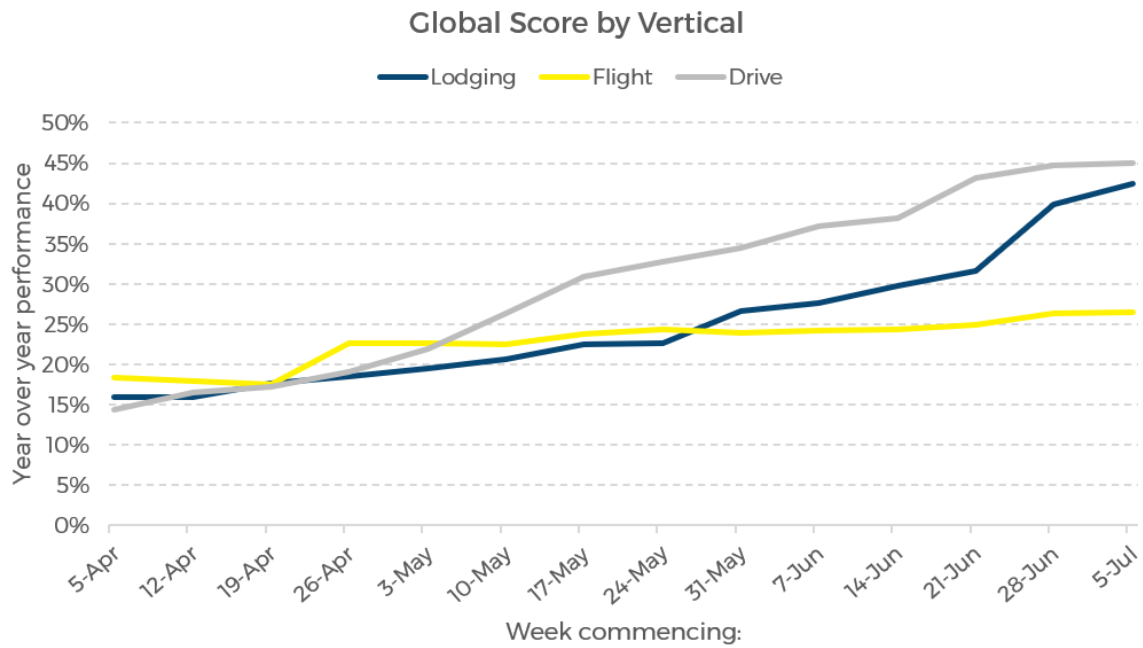
Country	Current score (w/c July 5)	Lowest score (since Jan 1)	Highest score (since April 5)	Week-over-week change						
				7 Jun	14 Jun	21 Jun	28 Jun	5 Jul		
Asia Pacific										
China	48	24	48	↑ 6%	↓ -6%	↑ 2%	↑ 15%	↑ 1%		
Australia	34	14	34	↓ -3%	↑ 6%	↓ -1%	↑ 14%	↑ 1%		
Thailand	32	14	33	↓ -1%	↑ 4%	↑ 8%	↑ 14%	↓ -2%		
India	26	13	26	↓ -2%	↑ 3%	↑ 3%	↑ 34%	↓ -1%		
Singapore	21	8	21	↓ -4%	↑ 1%	↑ 5%	↑ 20%	↑ 2%		
Europe										
Germany	44	16	44	↑ 2%	↑ 7%	▬ 0%	↑ 12%	↑ 4%		
France	41	13	41	↑ 4%	↑ 12%	↑ 7%	↑ 21%	↑ 7%		
Spain	39	16	39	↑ 18%	↑ 5%	↑ 7%	↑ 5%	↑ 6%		
Italy	38	12	38	↑ 11%	↑ 11%	↑ 10%	↑ 14%	↑ 8%		
UK	35	17	36	↑ 3%	↑ 9%	↑ 25%	↑ 7%	↑ 1%		
North America										
U.S.	43	14	43	↑ 10%	↑ 1%	▬ 0%	↑ 4%	↑ 5%		
Canada	39	11	39	↑ 7%	↓ -1%	↑ 14%	↑ 20%	↑ 9%		
Latin America										
Mexico	36	20	36	↑ 9%	▬ 0%	↑ 7%	↑ 3%	↑ 5%		
Brazil	35	14	35	↓ -1%	↑ 10%	↓ -12%	↑ 24%	↑ 7%		
Middle East										
UAE	37	17	37	↓ -3%	↑ 3%	↑ 12%	↑ 24%	↑ 8%		

Source: Skift Research

Flight Edging Up - Finally

The flight vertical, which has seen very little movement since April, is finally starting to show an upward trend. At the same time, car rental has flattened out for a few weeks now.

Exhibit 4: Flight starting to show upward movement



Source: Skift Research

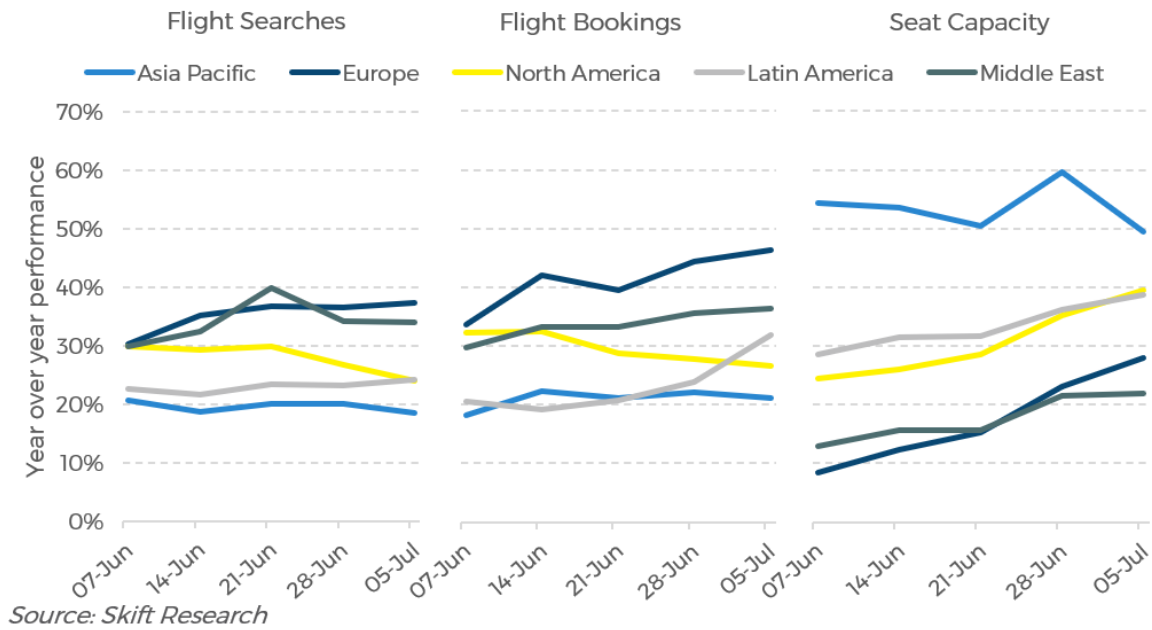
Flight performance is definitely not a runaway success just yet. Searches are still low, indicating that browsing for potential flights or vacations is not common place, but actual flight bookings are showing a significant uptick.

Seat capacity is also increasing, with capacity in Asia Pacific particularly high. This is mainly driven by China, where seat capacity in the week of July 5 was at 75% compared to the same time last year. With bookings only at 24% in the country, there are likely many empty seats.

In Europe we are seeing the highest increase in seat capacity, as searches and bookings in the region are ahead of anywhere else in the world.

Exhibit 5: Recovery is a mixed bag

Regional Source Market Flight Performance

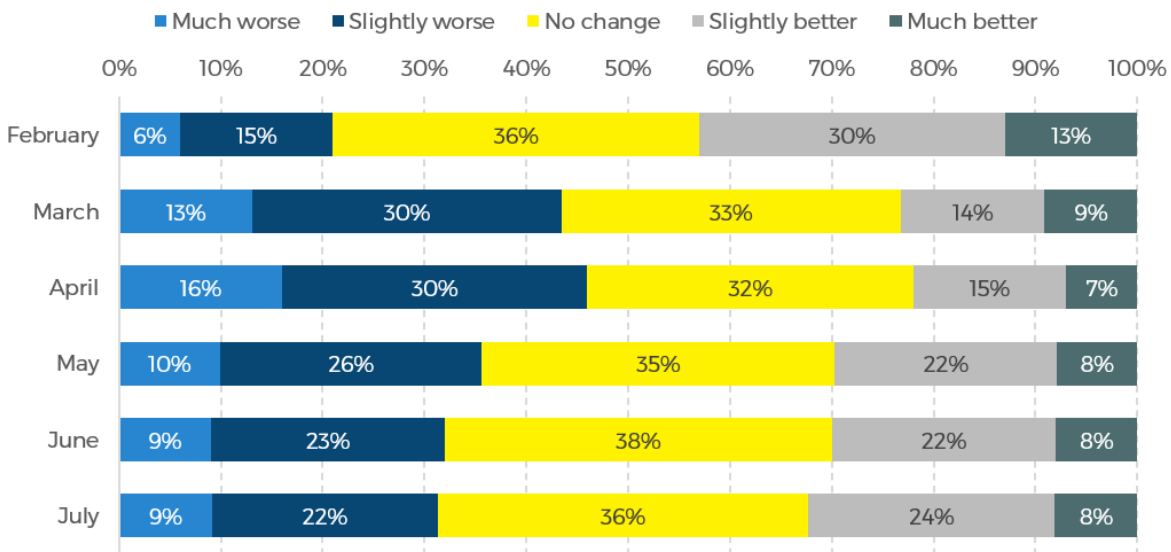


Travel Intent Rising

Earlier this week we launched the latest, monthly updated, [travel tracker](#) which gauges travel behavior and sentiment amongst U.S. travelers. The report contains some interesting findings which seem to resonate with the index. Consumer confidence and individuals' perceived economic conditions are trending up, with a growing group of respondents believing that their financial situation would improve over the next 12 months.

Exhibit 6: U.S. Travel Tracker shows growing confidence in economy

U.S. Perception of Personal Economic Condition in the Next 12 Months

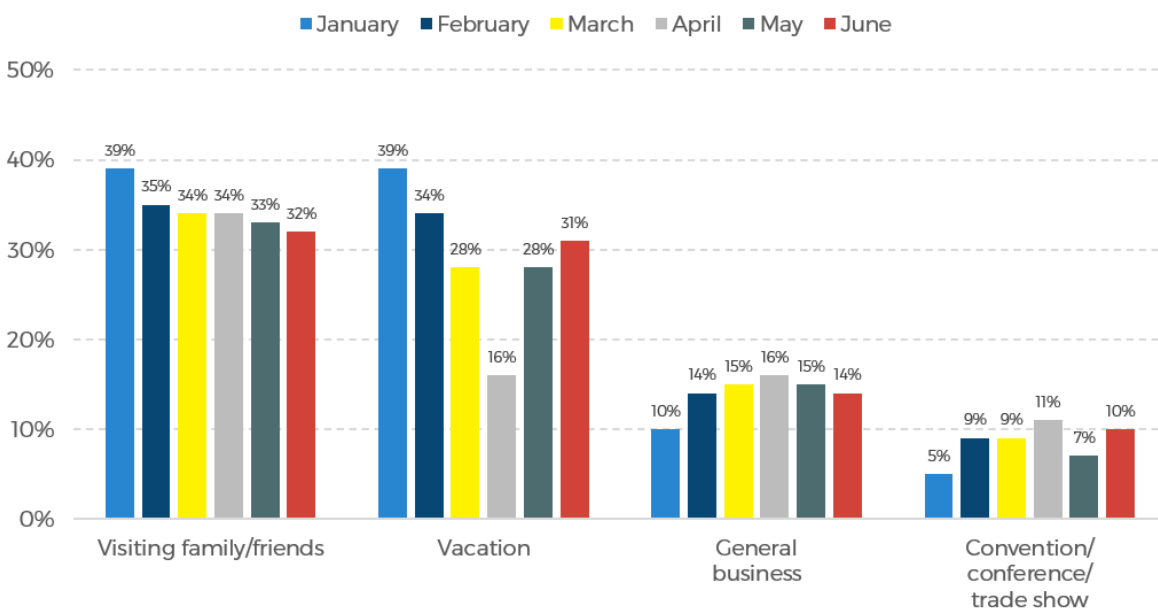


Source: Skift Research, U.S. Travel Tracker June 2020

This is mirrored by travel behavior seen in the U.S., with 33% of respondents of the travel tracker taking at least one trip during the month of June. Americans traveling for vacation saw the highest increases in the May and June survey.

Exhibit 7: Vacations are on the rise

Top Travel Purposes for U.S. Travel



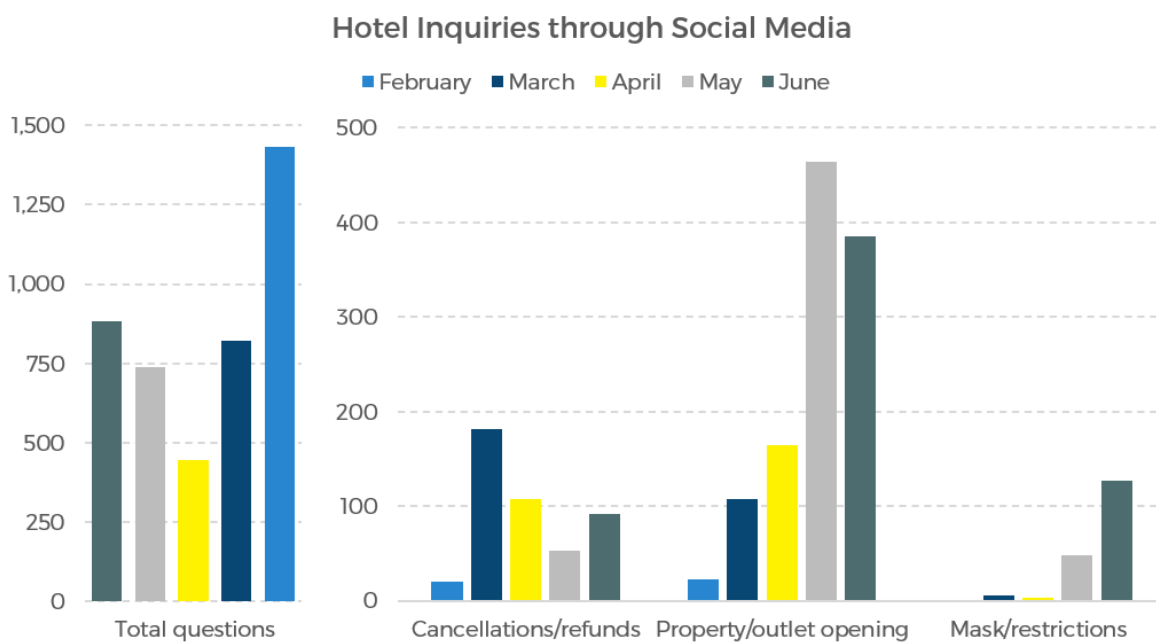
Source: Skift Research, U.S. Travel Tracker June 2020

The ethicality of some of these trips will be questionable, but they highlight an inherent drive from U.S. travelers to get back to traveling.

RateGain, one of our data partners, shared some interesting social media data from its hotel clients, showing that questions asked via social media have increased significantly since travel came to a halt in April, further supporting the notion that interest in traveling is picking up. The nature of the questions, however, has changed, with less questions in June about reopenings, and instead more about policies around masks and restrictions.

Questions about cancellations also showed an uptick in June. While our index data shows that cancellations globally are generally down compared to the heights of March/April, and also compared to last year, the social media data highlights that local lockdowns and ever-changing regulations still result in much uncertainty amongst travellers that needs to be addressed by hoteliers.

Exhibit 8: Nature of consumer questions are changing



Source: BCV, a RateGain company

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.

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.

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	21	22	23	24	25	26	27	28
Australia	23.5	25.1	29.7	28.7	30.3	30	34.1	34.3
Brazil	24.4	23.8	27.5	27.2	29.9	26.2	32.6	34.9
Canada	19.8	21.7	24.3	26.1	25.8	29.5	35.3	38.5
China	39.1	37.3	41	43.3	40.9	41.7	47.9	48.3
France	17.9	20.5	25.3	26.2	29.3	31.3	37.8	40.5
Germany	27.5	30.8	34.8	35.4	37.8	37.8	42.4	44.1
India	20.9	18.8	18.7	18.3	18.8	19.4	25.9	25.6
Italy	16.3	19.6	22.7	25.3	28	30.7	34.9	37.6
Mexico	28.9	25.9	28.7	31.3	31.4	33.5	34.4	36
Singapore	17	16.5	16.9	16.3	16.5	17.3	20.7	21.1
Spain	21.6	25.4	26.6	31.3	32.9	35.2	36.8	39
Thailand	22.4	23.1	25.8	25.6	26.6	28.7	32.6	31.9
U.S.	29.9	33.3	35.5	39.2	39.6	39.5	41.1	43
United Arab Emirates	22.9	21.4	24.9	24.2	25	28	34.7	37.4
United Kingdom	20.3	24.3	21.1	21.7	23.7	29.7	31.9	32.3

Destination Scores by Country

Country/Week	21	22	23	24	25	26	27	28
Australia	25%	25%	31%	30%	32%	32%	37%	38%
Brazil	23%	23%	27%	27%	30%	25%	34%	36%
Canada	20%	20%	23%	25%	27%	29%	36%	39%
China	42%	40%	44%	46%	43%	44%	52%	53%
France	16%	18%	22%	22%	25%	28%	34%	38%
Germany	25%	28%	32%	31%	33%	33%	38%	40%
India	21%	18%	18%	17%	18%	19%	27%	26%
Italy	17%	17%	19%	21%	23%	27%	30%	33%
Mexico	30%	27%	30%	32%	33%	35%	35%	36%
Singapore	16%	16%	16%	15%	15%	16%	21%	22%
Spain	22%	26%	26%	30%	32%	35%	36%	38%
Thailand	20%	20%	23%	22%	23%	25%	30%	29%
U.S.	33%	34%	37%	40%	41%	42%	45%	46%
United Arab Emirates	22%	20%	23%	22%	23%	26%	34%	37%
United Kingdom	18%	24%	18%	19%	21%	26%	33%	32%

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	21	22	23	24	25	26	27	28
Australia	24%	25%	26%	28%	29%	27%	28%	27%
Brazil	29%	27%	30%	29%	30%	29%	28%	31%
Canada	27%	28%	30%	32%	33%	34%	39%	40%
China	29%	29%	32%	35%	33%	34%	37%	35%
France	27%	32%	38%	42%	46%	46%	52%	52%
Germany	35%	39%	43%	47%	51%	51%	56%	55%
India	20%	20%	21%	22%	21%	22%	24%	25%
Italy	29%	33%	38%	42%	46%	47%	51%	54%
Mexico	31%	30%	32%	35%	34%	34%	38%	41%
Singapore	19%	18%	19%	19%	20%	20%	20%	19%
Spain	27%	32%	35%	38%	43%	43%	46%	46%
Thailand	30%	34%	36%	37%	38%	40%	40%	39%
U.S.	36%	36%	38%	42%	41%	42%	42%	41%
United Arab Emirates	26%	25%	32%	30%	32%	34%	38%	39%
United Kingdom	29%	31%	33%	34%	36%	44%	44%	45%

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	21	22	23	24	25	26	27	28
Australia	72%	72%	75%	72%	72%	72%	74%	74%
Brazil	83%	83%	83%	83%	83%	80%	81%	81%
Canada	61%	61%	64%	61%	61%	61%	62%	62%
China	75%	75%	75%	75%	75%	75%	77%	77%
France	85%	88%	88%	88%	88%	85%	86%	86%
Germany	91%	93%	96%	93%	93%	93%	94%	94%
India	69%	69%	72%	72%	72%	72%	72%	72%
Italy	99%	101%	101%	101%	101%	101%	101%	100%
Mexico	91%	91%	91%	91%	91%	91%	93%	93%
Singapore	69%	69%	69%	69%	69%	72%	73%	73%
Spain	93%	93%	96%	93%	96%	93%	94%	94%
Thailand	77%	77%	77%	77%	77%	75%	76%	76%
U.S.	75%	77%	77%	75%	75%	75%	75%	75%
United Arab Emirates	91%	88%	88%	88%	91%	88%	89%	89%
United Kingdom	88%	88%	88%	88%	88%	88%	87%	87%

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	21	22	23	24	25	26	27	28
Australia	15%	16%	17%	20%	21%	19%	20%	19%
Brazil	19%	17%	20%	19%	21%	20%	19%	22%
Canada	21%	22%	24%	27%	28%	29%	35%	36%
China	21%	21%	25%	28%	26%	26%	30%	28%
France	17%	23%	30%	34%	38%	38%	46%	46%
Germany	25%	29%	34%	39%	43%	44%	49%	48%
India	11%	11%	12%	13%	12%	13%	15%	16%
Italy	17%	21%	26%	32%	36%	38%	42%	46%
Mexico	21%	19%	22%	25%	24%	24%	29%	32%
Singapore	10%	10%	10%	10%	10%	10%	11%	10%
Spain	16%	21%	24%	28%	34%	34%	38%	38%
Thailand	23%	26%	28%	30%	31%	34%	34%	33%
U.S.	29%	29%	31%	36%	35%	36%	36%	35%
United Arab Emirates	15%	14%	21%	20%	22%	24%	29%	30%
United Kingdom	18%	21%	24%	24%	27%	36%	37%	37%

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	21	22	23	24	25	26	27	28
Australia	27%	27%	38%	37%	40%	40%	49%	50%
Brazil	19%	18%	25%	25%	29%	21%	37%	40%
Canada	20%	20%	25%	27%	32%	36%	46%	52%
China	42%	38%	44%	48%	43%	43%	57%	61%
France	16%	17%	24%	24%	28%	32%	41%	46%
Germany	24%	29%	36%	35%	38%	37%	45%	50%
India	9%	8%	10%	9%	11%	12%	20%	24%
Italy	15%	12%	17%	20%	24%	29%	33%	36%
Mexico	34%	28%	30%	32%	33%	37%	36%	36%
Singapore	11%	11%	12%	10%	11%	12%	20%	22%
Spain	26%	28%	31%	38%	40%	43%	43%	46%
Thailand	16%	17%	21%	19%	22%	24%	33%	32%
U.S.	40%	42%	46%	51%	53%	54%	57%	60%
United Arab Emirates	25%	22%	25%	24%	25%	28%	42%	47%
United Kingdom	13%	23%	13%	16%	18%	27%	39%	37%

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	21	22	23	24	25	26	27	28
Australia	23%	23%	23%	23%	23%	23%	23%	23%
Brazil	29%	29%	29%	29%	29%	29%	29%	29%
Canada	18%	18%	19%	19%	18%	18%	19%	20%
China	46%	46%	46%	46%	48%	49%	47%	45%
France	17%	19%	19%	20%	21%	21%	24%	25%
Germany	18%	20%	19%	20%	20%	20%	22%	23%
India	38%	33%	28%	28%	28%	27%	36%	30%
Italy	21%	24%	21%	21%	21%	22%	25%	27%
Mexico	27%	27%	32%	33%	33%	33%	34%	34%
Singapore	23%	22%	22%	22%	22%	22%	22%	21%
Spain	18%	23%	20%	19%	21%	23%	26%	27%
Thailand	24%	24%	25%	26%	25%	26%	28%	28%
U.S.	21%	22%	22%	24%	23%	23%	24%	24%
United Arab Emirates	15%	15%	16%	16%	16%	19%	19%	21%
United Kingdom	19%	21%	17%	17%	17%	19%	19%	20%

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	21	22	23	24	25	26	27	28
Australia	19%	19%	19%	19%	19%	21%	23%	20%
Brazil	19%	21%	24%	29%	35%	40%	44%	51%
Canada	43%	40%	40%	45%	40%	51%	53%	48%
China	19%	19%	19%	19%	19%	21%	23%	20%
France	19%	21%	21%	27%	32%	35%	43%	55%
Germany	83%	85%	93%	93%	93%	99%	88%	81%
India	19%	19%	19%	19%	19%	21%	23%	20%
Italy	19%	21%	24%	29%	35%	40%	44%	51%
Mexico	19%	21%	24%	29%	35%	40%	44%	51%
Singapore	19%	19%	19%	19%	19%	21%	23%	20%
Spain	19%	21%	24%	29%	35%	40%	44%	51%
Thailand	19%	19%	19%	19%	19%	21%	23%	20%
U.S.	51%	51%	51%	59%	56%	64%	67%	59%
United Arab Emirates	40%	43%	45%	48%	48%	53%	54%	54%
United Kingdom	67%	69%	69%	72%	77%	80%	74%	71%

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!