Skyscanner Horizons

The Return of Travel

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"With international travel once again on the horizon, we've looked at how, when and where it's likely to return ahead of the peak travel season. Our analysis reveals how travellers' preferences are changing compared to pre-pandemic and we've identified a number of emerging global trends that offer a snapshot of today's travel landscape that will influence the sector in 2021.

"That said, there are still many pieces of the puzzle needed to fully restore traveller confidence and truly unlock underlying demand. As we have seen in the past, travellers are adept at adjusting to new measures. However, we are entering a period where the importance of clear, straightforward and timely information is vital, especially relating to restrictions, quarantines and testing requirements."

Hugh Aitken, VP of Flights - Skyscanner

"As identified by Skyscanner's impressive analysis of the industry, leisure traffic and VFR [Visiting Friends and Relatives], the low yielding segments for airlines will dominate travel profiles for the remainder of 2021 and beyond. Fewer business travellers, the key to long-haul full-service operations, will take longer to take to the skies, so the leisure/VFR markets, particularly domestic and short-haul international, will be in the ascendency. For the airlines in this environment, low costs are king, so LCCs are well positioned."

Derek Sadubin, Managing Director - CAPA (Centre for Aviation)

"Following more than a year of global travel restrictions, Skyscanner's report finally shines light on the path to recovery. It reveals a clear distinction in traveller preferences today, compared to pre-pandemic travel. Notwithstanding the obvious disruption caused to the industry, the report reveals for the first time a strikingly different set of traveller profiles emerging.

"For destinations, the clear growth in confidence shown by travellers means adopting a more tactical approach for a few months yet, focusing on certainty and the possibility of a total shake-up of traditional markets and segments. For secondary and domestic destinations, this is a rare opportunity to turn an anomaly into a permanent trend."

Nick Hall, CEO - Digital Tourism Think Tank

Glancing back, looking forward

In what's been a year like no other, COVID-19 has caused a seismic, permanent shift in how we live, work – and travel. Now, as some countries start to emerge from the pandemic, we're sharing our latest insights on what this new world of travel will look like.

Skyscanner is in a privileged position to share global insights. As a world-leading travel marketplace, millions of people use our app or website every day to find their perfect flight, hotel or car, as well as search for trip and destination inspiration. Our powerful, forward-looking data reveals insights into demand, habits and behaviours, so we can drill down into what travellers are doing in 2021.

For our first Skyscanner Horizons report, we analysed traveller activity on a global scale to uncover those big, shared stories, and dug deeper to discover regional and market trends.

It's been 13 months since the World Health Organization declared COVID-19 a pandemic in March 2020, an announcement that's fundamentally changed how we plan and book travel.

For the popular travel months of June to October, airfares this year are lower than in 2019 and 2020, especially in Europe, with confident travellers willing to book and take advantage of cheaper flights.

Price has long been the biggest consideration factor when booking a flight. Now there's a more complex decision-making process to navigate. Factors like safety and hygiene, flexibility, direct vs indirect, the number of stops and destination type play a bigger role in shaping travel plans.

Trip planning is different too. Booking windows shrunk at the start of the pandemic, but are rising as confidence grows in booking further in advance. People are going away for longer (to make their trips count!), visiting different destinations (hello beaches and nature, goodbye city breaks) and staying closer to home (or not leaving their country at all).

It all means that as we start to explore the world again, travel is going to feel brilliantly, wonderfully familiar yet unmistakably different.

Welcome to a new era of travel.

Chapter 1: The evolution of trip planning

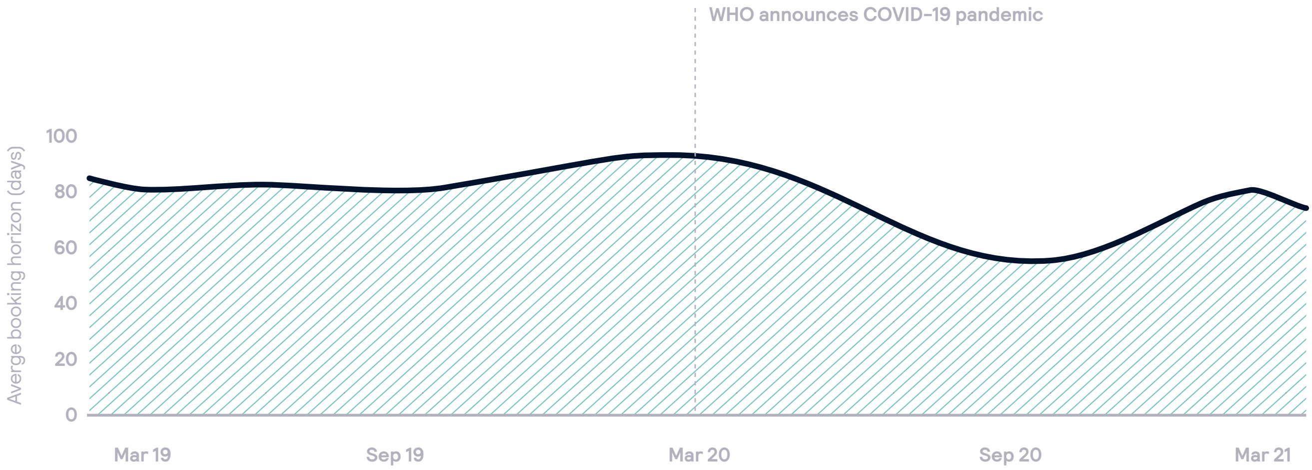
From shorter booking horizons to airline safety scores, the past 12 months have recalibrated the trip-planning process.

Booking horizons are growing

Booking horizons – the gap between purchase date and travel date – decreased sharply with the pandemic. As international travel ground to a halt, trips were cancelled and people quickly returned home, short-term solutions replaced long-term planning.

Booking horizon trends

Average globally (March 2019 – March 2021)



International and domestic travel both picked up again halfway through the year. But given the unpredictable nature of the pandemic and concerns about the future, booking horizons remained short as many gambled on a last-minute adventure.

In Europe, especially, travel corridors were sometimes added and removed with only a day or two's notice, plus concerns over a second wave later in the year, meant mid- to long-term travel planning was almost impossible.

Travel is now back on the agenda. Booking horizons started to grow at the beginning of 2021, approaching pre-pandemic levels – possibly as a result of vaccination programmes giving people more confidence in booking further in advance.

Booking horizons grow with traveller confidence

Booking horizons are currently 80 days in EMEA, 70 in AMER and 54 in APAC. UK travellers have by far the longest at 113 days – just over three and a half months – buoyed by their vaccination progress and the high chance of summer holidays in Europe and beyond.

There's a groundswell of positivity towards travel in recent weeks from UK travellers. A recent Skyscanner pulse survey highlighted that two-thirds believe the global COVID-19 situation is getting better, a trend that's been increasing since January.

Other booking horizons

Brazil and Italy
84 days

Spain
77 days

France
68 days

Germany and USA
64 days

Russia
52 days

India
48 days

South Korea
43 days

It's a different story in some APAC markets. While 65% of Australians believe the global COVID-19 situation is improving, only 34% of South Koreans and 32% of Japanese agree. In AMER, where booking windows are higher, 75% of Americans think the situation is getting better.

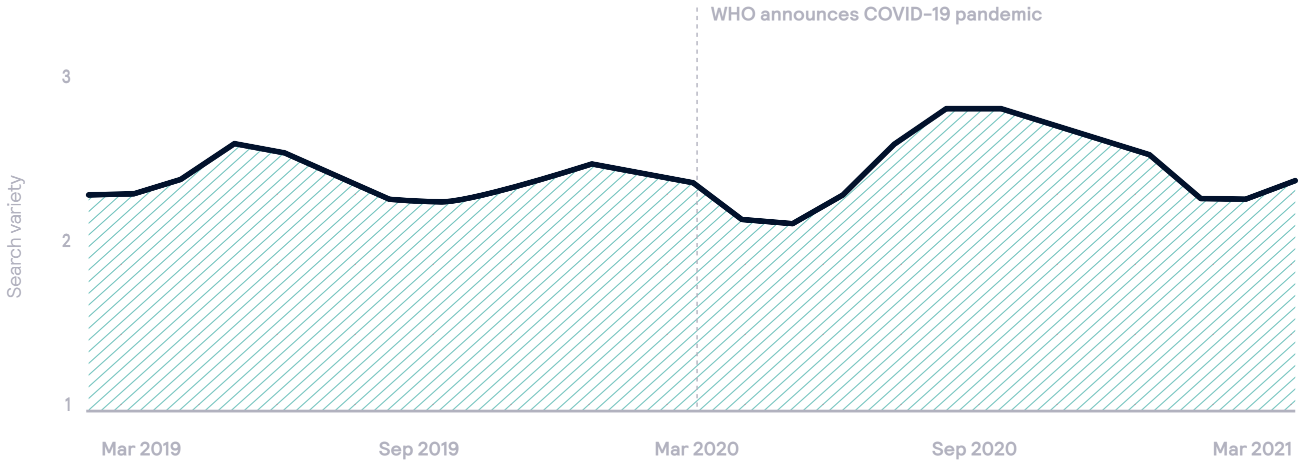
Spain was the top destination booked by UK travellers on Skyscanner following the government's recovery roadmap announcement in February, with the most popular outbound month being August. Searches to Greece from the UK for summer 2021 have increased 44% week-on-week, with the top increases being London to Mykonos (+278% WoW) and London to Zante (+363% WoW).

Dreaming and planning rise alongside confidence levels

On the graph, '1' equals a traveller performing a search to one destination using one set of travel dates, e.g. they know where they're going and when. '2' represents when a traveller changes either the destination or the dates once.

Average search variety trend

March 2019 – March 2021 (globally)



Search variety dropped by 20% in March 2020, as dreaming and planning phases were replaced by the need to relocate as quickly as possible.

Location and date search variety increased from July to October 2020, surpassing pre-pandemic levels from August, as travellers looked for trip inspiration and explored their options amid all the restrictions that were in place.

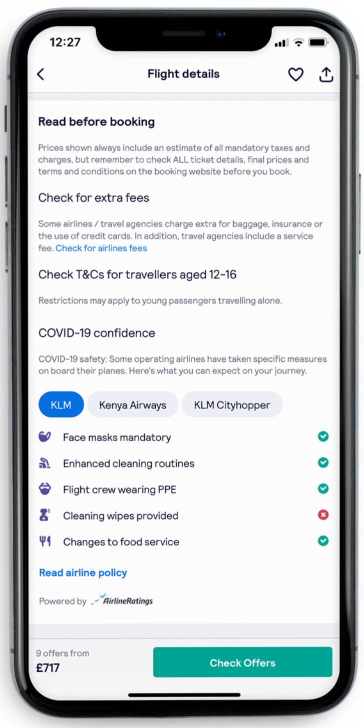
Safety is a growing priority

When a traveller searches for a flight on Skyscanner, they can see each airline's safety score. It's rated from 1 to 5 and is checked against:

- Mandatory face masks
- A daily deep-clean of the plane
- Flight crew wearing PPE
- Cleaning wipes provided
- A change to the food service

More travellers are choosing airlines with higher safety scores, reaching an average of 4.8/5 at the end of January 2021 – after having steadily increased from last summer from just under 4.2/5. At the same time, more airlines were introducing safety scores to increase traveller confidence in flying.

> 95% of Skyscanner users are shown an itinerary with an airline safety score.



Chapter 2: Travel, redefined

This year, travellers are making their holidays count. With most being denied the luxury of a trip abroad – or any trip at all – in 2020, and with vaccination numbers increasing, bigger, longer getaways are being planned for June to October.

Average trip duration

Globally, the average trip length during 2021 is 16 days – up from 14 days last year and the year before, with the biggest increase in trips over 21 days. Travellers are after that one big getaway and it's at the expense of shorter trips and city breaks.

Average trip duration

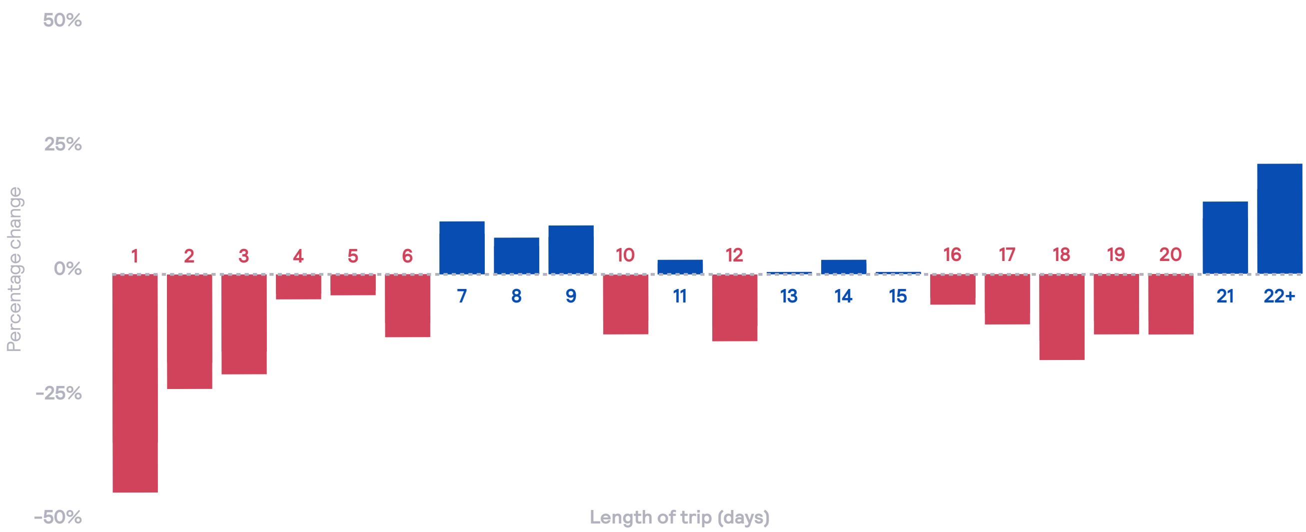
Two days higher in 2021

14 days
Average trip duration
2019

16 days
Average trip duration
2021

Percentage change in trip length

This year, more travellers are going away for three weeks or longer (2021 vs 2019)



At a country level, the biggest drivers are Singapore (setting aside extended time to visit friends and family), South Korea and Japan. In the United States, Australia, India, Russia and Brazil, travellers are taking fewer days this year than in 2019.

18 days	**17 days**	**15 days**
Up from 13 in 2019	Same as 2019	Up from 14 in 2019
APAC	AMER	EMEA

Late September surges

Trips are longest at the end of June and early July – and this hasn't changed. In 2020 and 2019, average trip length fell from the start of July. But this year, trip length climbs again from the start of September – averaging nearly two weeks at the month's end.

Trips are being pushed back

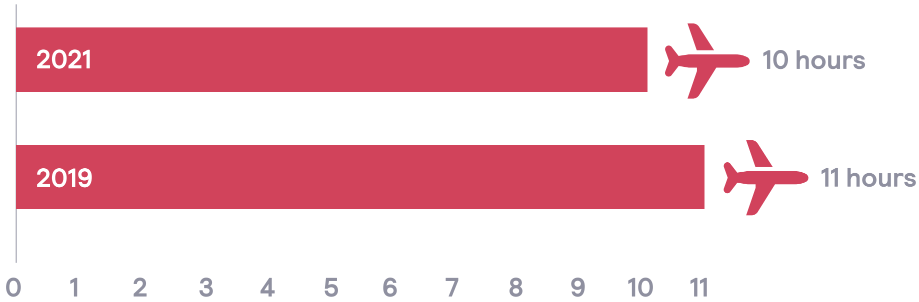
With travel restrictions and uncertainty still a factor, people are pushing their travel dates back later in the year. Fewer are searching for trips in May, June and August compared to 2019, with July, September, October and November more popular than they were two years ago.

Journey time has decreased

This year, there are longer trips in the calendar but shorter journey times. Travellers are staying closer to home from June to September and then looking to travel further afield from October. Back in 2019, the average journey time during June to October was 11 hours. This has fallen to 10 hours in 2021.

Travel times have dropped by one hour from 2019

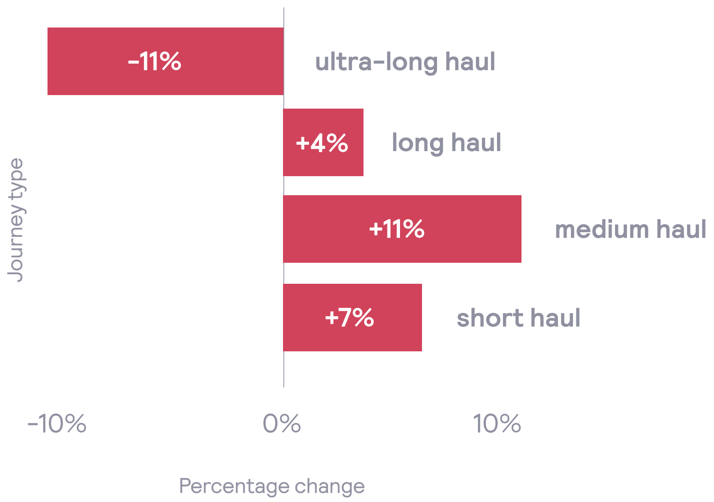
The average journey time in hours in 2021 vs 2019



Travel times stayed the same in the UK (9 hours), dropped in the US (14 to 13 hours), Australia (16 to 14 hours) and Germany (10 to 9 hours), but rose in South Korea (11 to 12 hours). Looking at changes in journey duration popularity, all distances have increased apart from ultra-long-haul flights (12 hours+).

Fewer travellers are going ultra-long haul

The percentage change in journey duration popularity in 2021 vs 2019



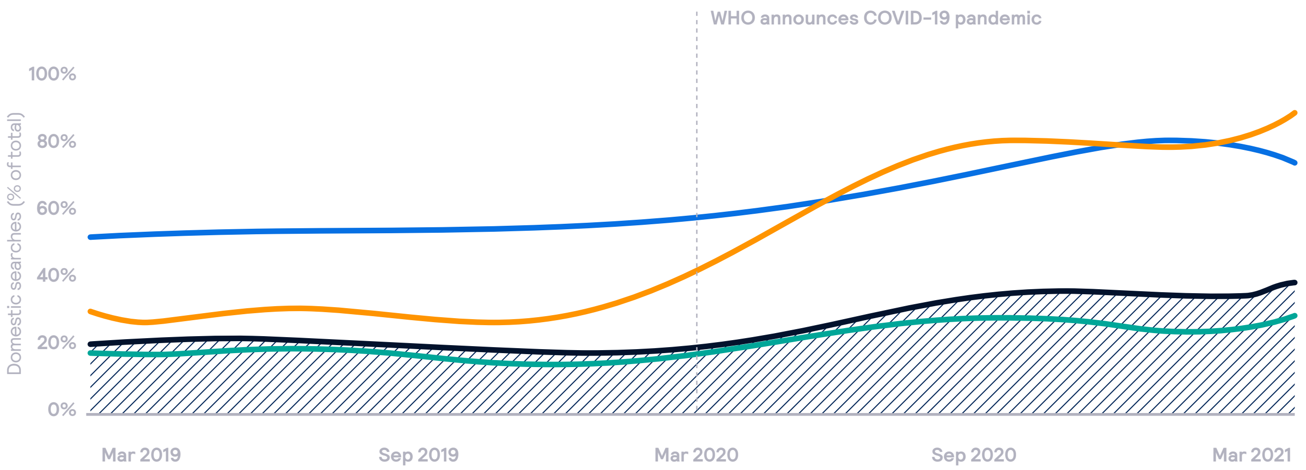
Domestic air travel continues to remain high

Almost a quarter of bookings this year (23%) are domestic, up from 17% in 2019 and 2020 – an increase of 6%. They're being driven by travellers in APAC and AMER, with a recent increase in EMEA.

Percentage of domestic searches over time

Domestic travel in APAC has grown to 83% of all searches

AMER 70% APAC 83% Global 38% EMEA 29%



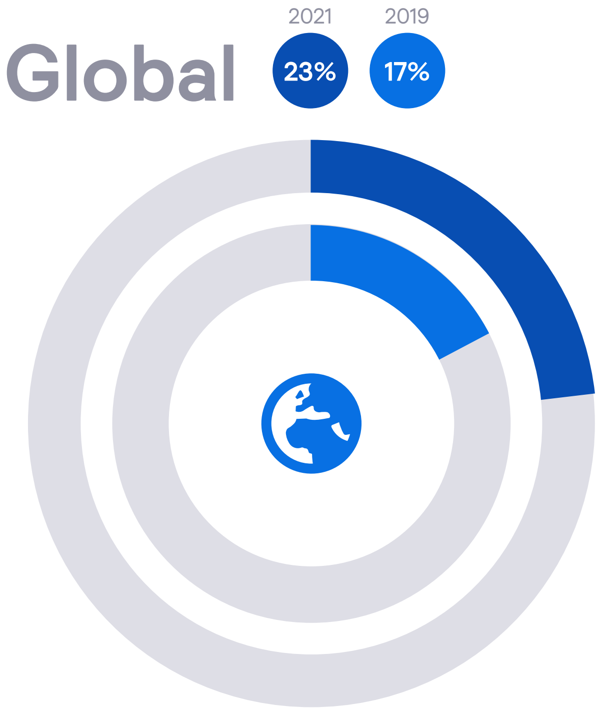
Domestic air travel in June to October 2021 remains high

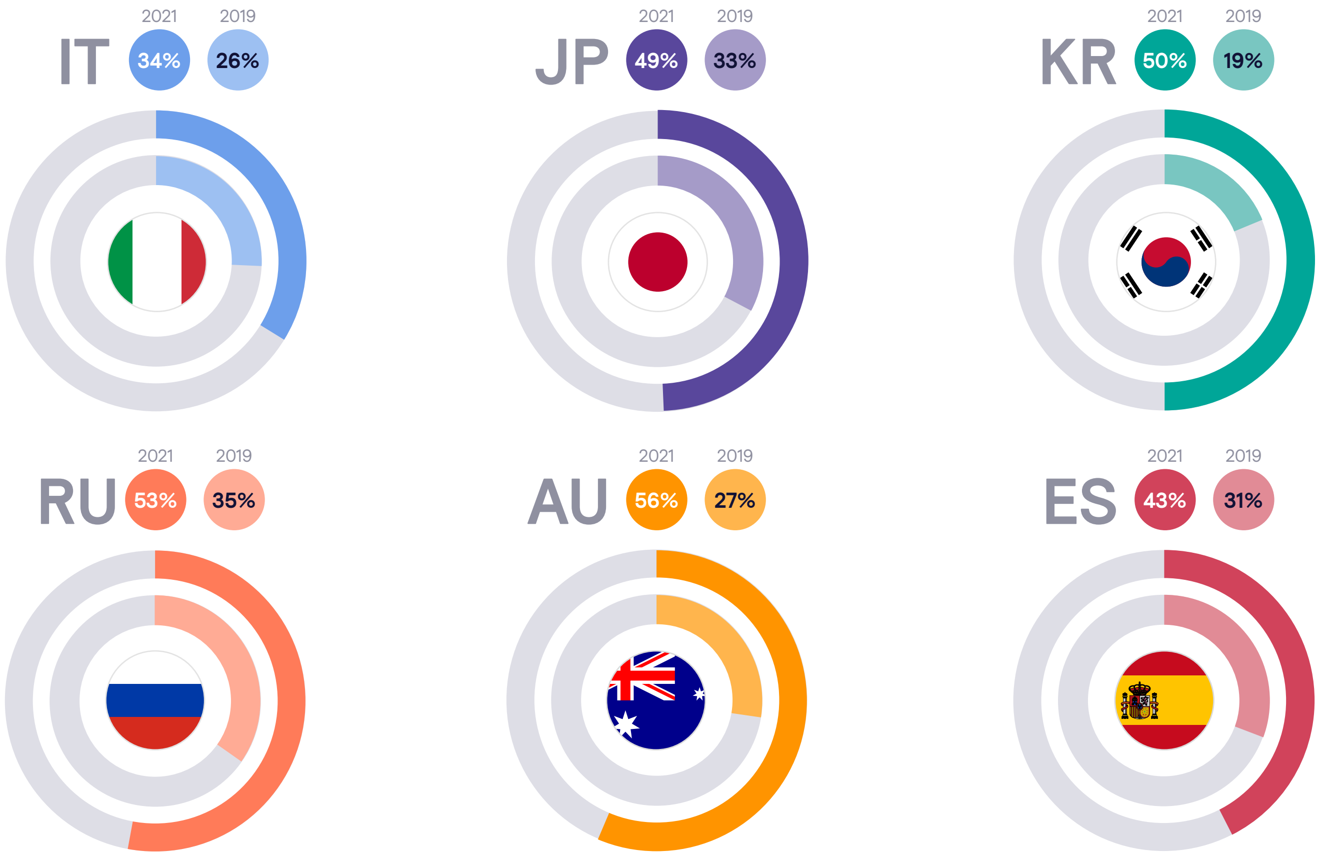
But which countries are driving this staycation trend? There are a few, but it's mainly South Korea (up 31%), Russia (up 18%) and Australia (up 29%).

Domestic searches are down by 2% in the United States and 6% in Germany from 2019 – as travellers likely seek alternative modes of transport to explore their own backyards.

Percentage of domestic searches

Travel June to October in 2021 vs 2019





Hello beaches and the great outdoors!

Now that international travel is back on the horizon and people are planning post-lockdown trips, which are the biggest trending destinations?

There are some interesting movers, revealing a desire from travellers to seek out areas which are quieter, coastal, more rural and away from the crowds.

The average city score has trended down since 2019, remaining at its lowest this year.*

0.44
Average city score
2019

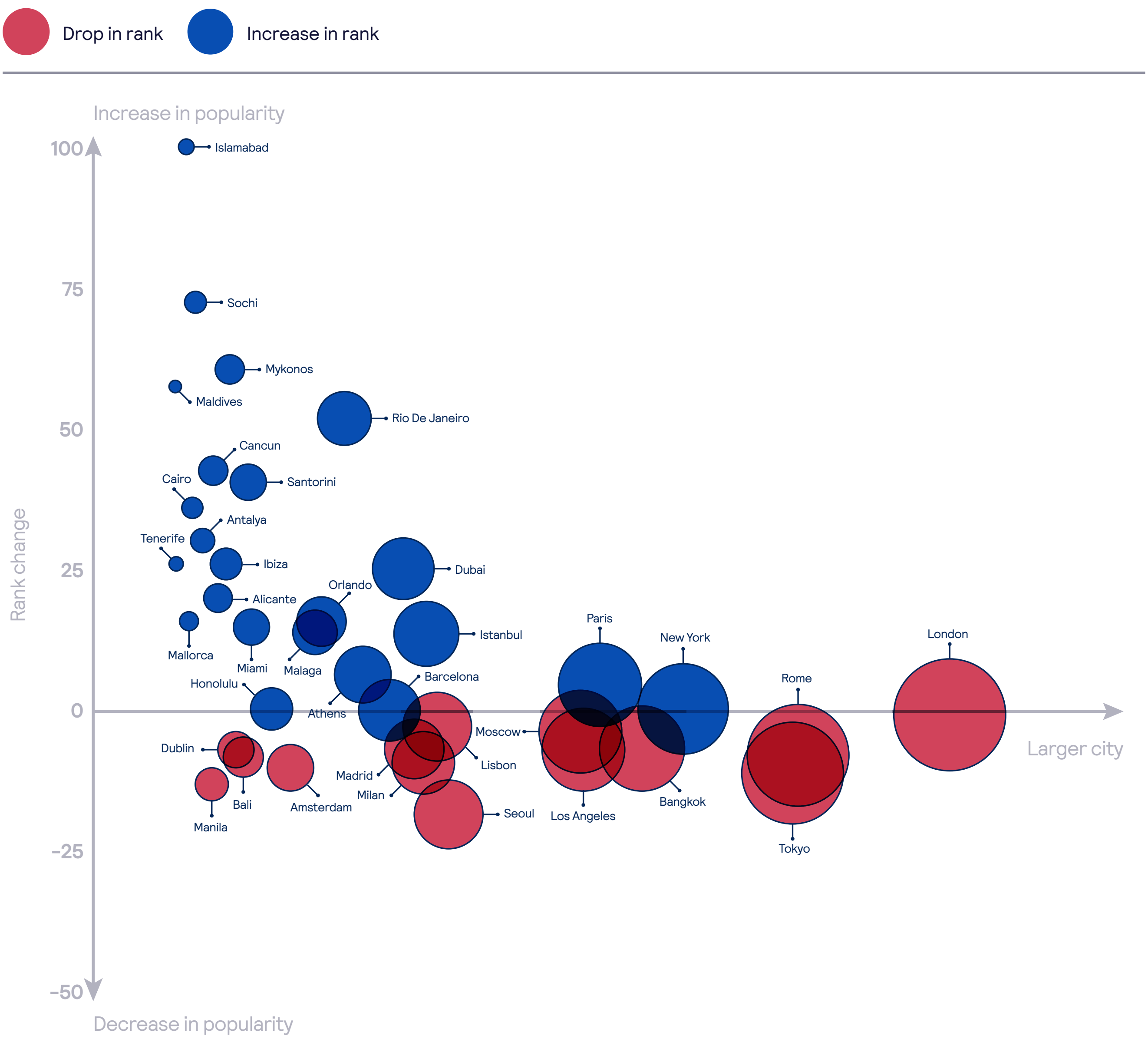
0.38
Average city score
2021

The world's biggest cities have dropped in popularity, apart from Paris and New York, with travellers preferring smaller coastal destinations.

* Our 'city score' is a unique Skyscanner scoring system based on destination content from Wikivoyage and Skyscanner data. Cities are given a score from 0 to 1 based on size.

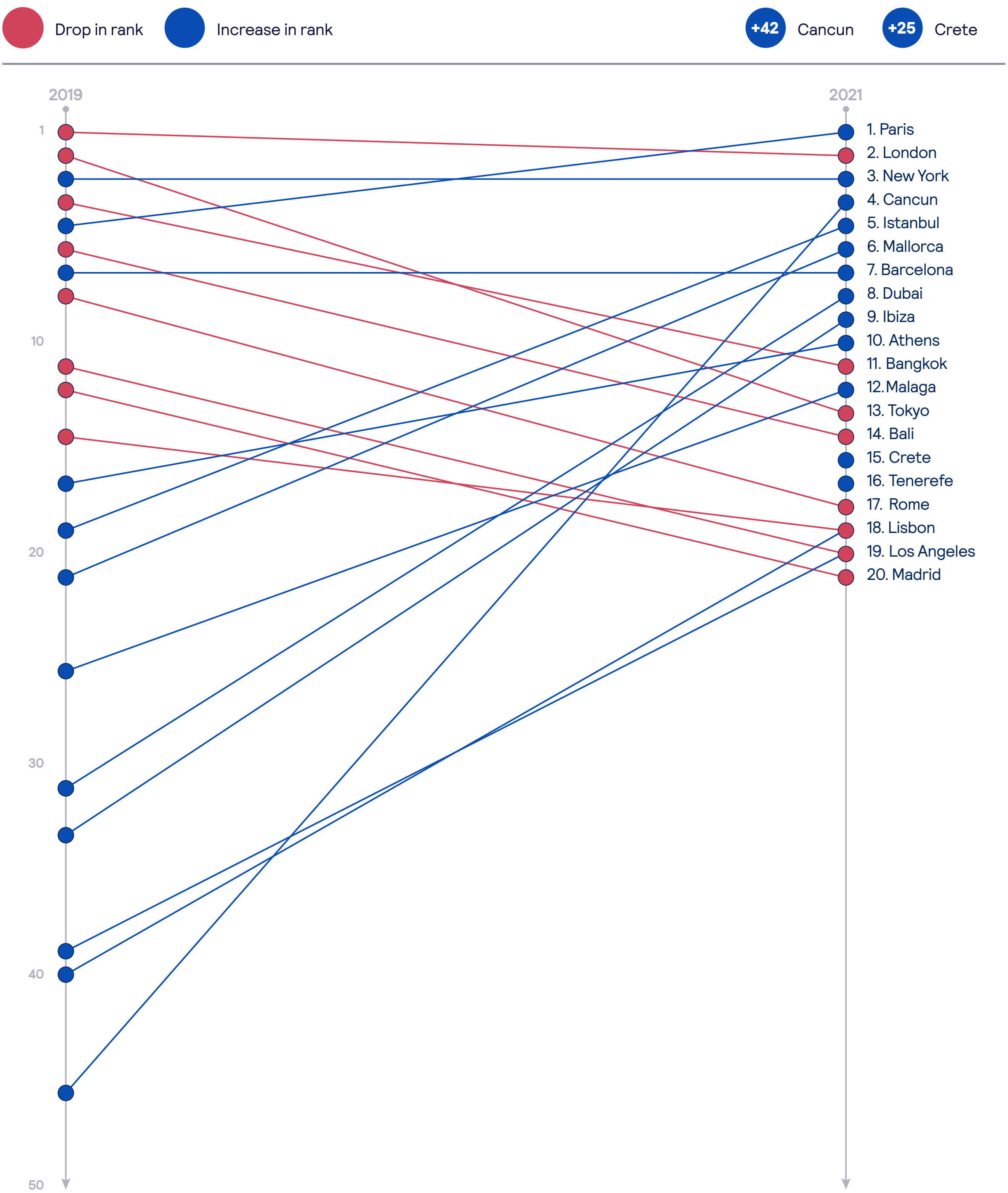
The top 40 cities are comprised of more smaller cities than before

The change in search ranking of small versus large cities in 2021 vs 2019



The top 20 global search destinations

Change in global search rank in 2021 vs 2019



Cancun is the biggest riser, followed by Crete, Ibiza, Dubai and Tenerife. All boast long, warm days and access to sprawling beaches with the option to get away from the crowds.

Below are the top 20 destinations which have moved up by at least five positions. Sub-tropical, uncrowded Mauritius saw the launch of more routes last winter and introduced exclusive remote working opportunities to attract visitors. While Pakistan's capital, Islamabad, has seen a wave of searches as family and friends plan reunions.

Rank increase (vs 2019)	Destination
126	Mauritius
101	Islamabad
95	Dalaman
85	Zante (Zakynthos)
76	Menorca
72	Lanzarote
69	Miami
68	Sochi
68	Corfu
60	Zanzibar
56	Mexico City
56	Mykonos
55	Gran Canaria
54	Kyiv
53	Maldives
52	Simferopol
47	Rio De Janeiro
45	Jeju
42	Cancun
42	Sao Paulo

Destinations which have fallen down the rankings include the big cities of Bangkok, Tokyo and Rome, plus the capital of Bali, Denpasar. The beach destinations of Mexico and EMEA are growing in popularity over their Asian counterparts.

Some of the biggest fallers include international business hubs like Beijing, Taipei, Osaka, Hong Kong and Singapore, with European inland cities such as Prague, Munich and Budapest dropping by around 50 places each.

A quiet spot on the Indian Ocean island nation of Mauritius, the destination with the biggest search rank increase from 2019.

Top 20 destinations per passenger type

Of course, different demographics want different things from their holidays. So let's drill down into the top 20 most searched destinations for June to October 2021 for three different types of passenger: two adults, groups of adults (more than two), and families.

Top 20 destinations for two adults

2021 global search rank	Destination
1	Bali
2	Crete
3	Tenerife
4	Alicante
5	Santorini (Thira)
6	Maldives
7	Las Vegas
8	Corfu
9	Lanzarote
10	Porto
11	Naples
12	Jeju
13	Dalaman
14	Venice
15	Paphos
16	Dominican Republic
17	Rhodes
18	Madeira
19	Sardinia
20	Fuerteventura

Two adults travelling together overwhelmingly favour islands and coastal destinations, with Bali topping the list, followed by largely European islands.

Top 20 destinations for groups

2021 global search rank	Destination
1	Mallorca
2	Ibiza
3	Malaga
4	Crete
5	Tenerife
6	Alicante
7	Faro
8	Orlando
9	Menorca
10	Corfu
11	Malta
12	Cyprus
13	Lanzarote
14	Gran Canaria
15	Split
16	Jeju
17	Dalaman
18	Zante (Zakynthos)
19	Paphos
20	Fuerteventura

The Spanish Mediterranean island of Mallorca is the most searched destination, followed by Ibiza, Malaga and predominately European islands. In fact, it's only Jeju and Orlando which are from outside EMEA.

Top 20 destinations for families

2021 global search rank	Destination
1	Istanbul
2	Mallorca
3	Dubai
4	Crete
5	Tenerife
6	Antalya
7	Orlando
8	Sochi
9	Islamabad
10	Simferopol
11	Cairo
12	Cyprus
13	Lanzarote
14	Jeju
15	Dalaman
16	Paphos
17	Rhodes
18	Thessaloniki
19	Fuerteventura
20	Anapa

The destinations here are more varied, with Pakistan's capital Islamabad and Egypt's capital Cairo coming in at nine and 11, respectively. The rest of the list remains fairly similar to what we've seen with the other two – sunny, coastal resorts and Mediterranean islands.

Chapter 3: Price vs value

Airfares in many countries are now cheaper than they were before the pandemic – and travellers are taking advantage. But it's no longer just about the cheapest ticket, as people select prices more expensive than the lowest available.

UK travellers spend more to stay safe

Pre-pandemic, the average fare chosen by UK travellers was 27% higher than the cheapest price available – showing how people were willing to pay more to find the right flight.

When the pandemic hit in March 2020, the difference between the cheapest fare available and the average fare selected increased fourfold – as people ditched price in favour of flights that would get them home fast.

After April 2020, the fare gap decreased but remained about 30% higher than pre-pandemic levels. Since January 2021, the price difference has remained around double.

From March 2020, UK travellers ditched price in favour of flights that got them home fast.

Getting home faster

UK travellers made more stops per leg in March 2020, rising from 1.6 to 2.2 as global lockdowns upended traditional routes and prevented many direct flights from operating. In short, they paid more for longer journeys to get home.

As lockdowns eased, infection rates fell and travel corridors opened up with safe destinations for summer holidays, stops fell to an average of 1.7 per leg as travel partially resumed.

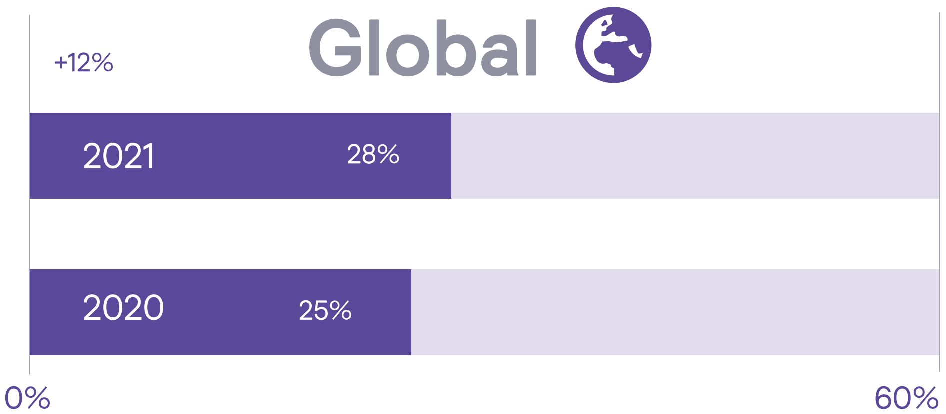
Selected prices today are 12% higher than pre-COVID

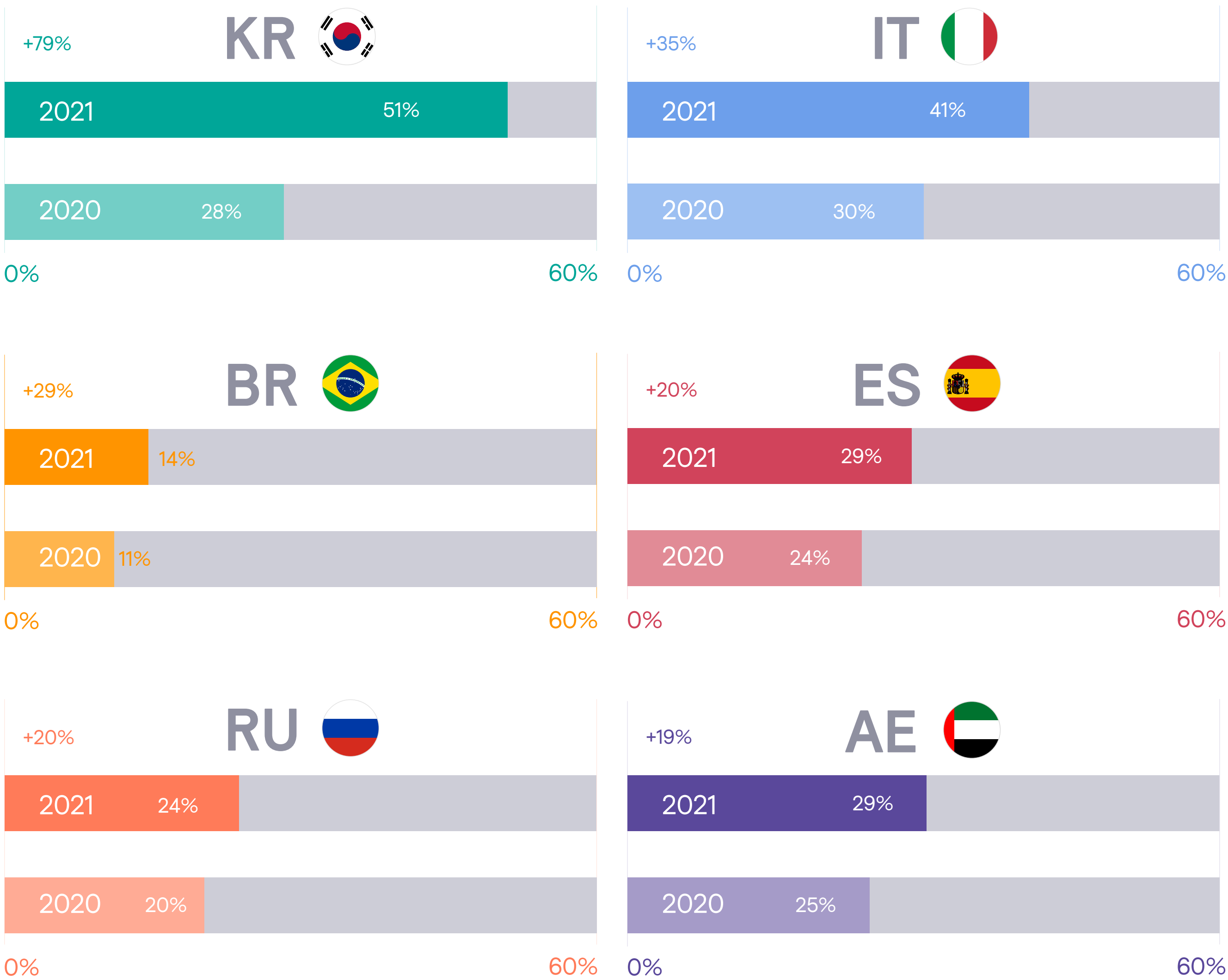
For the first two and a half months of 2020, travellers globally selected prices 25% more expensive than the cheapest price available – highlighting their willingness to spend more to find their perfect flight.

For the same period in 2021, this increased to 28%. In fact, selected prices relative to the cheapest rose in all markets across EMEA, APAC and AMER.

Selected prices relative to the cheapest rose in all markets

The percentage difference in the selected price compared to the cheapest price, plus the year-on-year growth



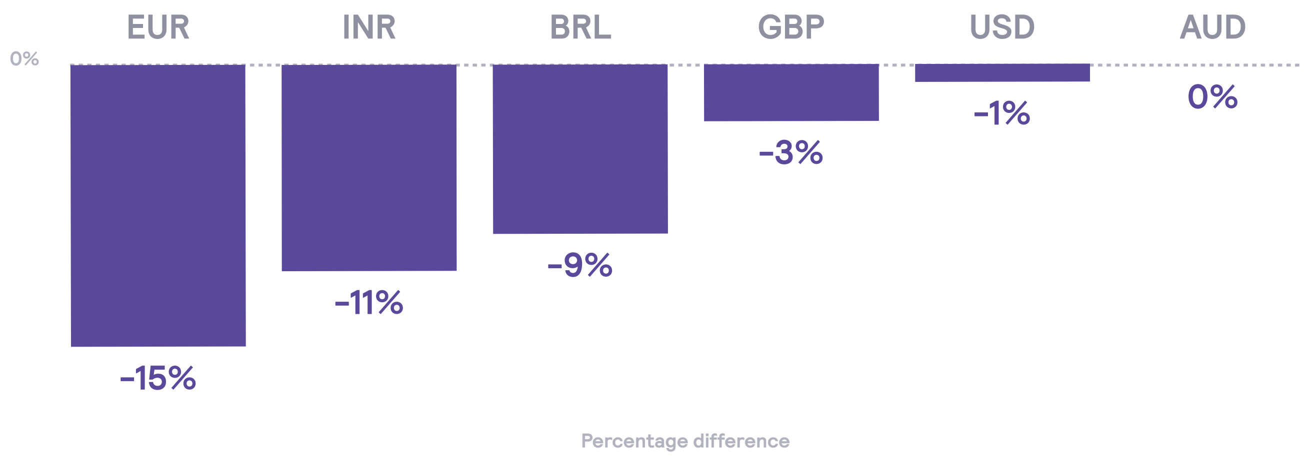


June to October travel months: Cheaper prices than pre-COVID in some markets

But when we look at the cheapest ticket prices available for June to October 2021, they've fallen across the majority of markets, especially Europe, India and Brazil.

Prices are cheaper in some markets

The percentage difference in the cheapest price shown in 2021 vs 2019. Selected currencies.

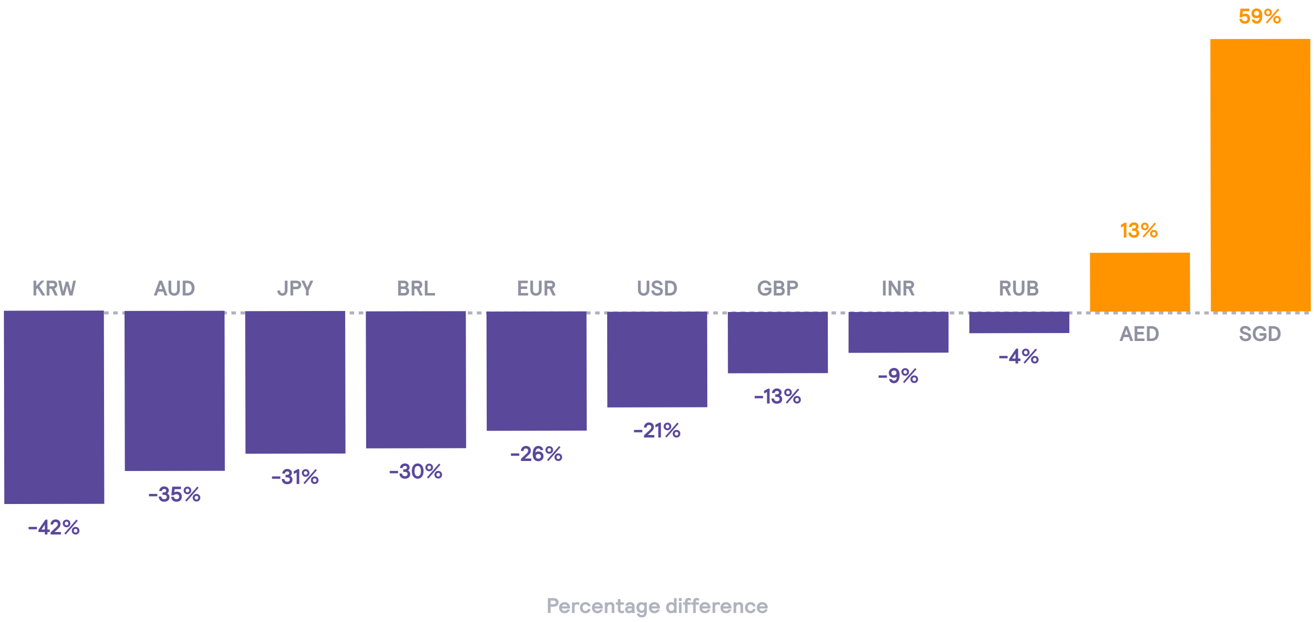


June to October travel months: People are spending less

Travellers are spending less on flights for the months of June to October compared to pre-COVID – and for the UK, US and Europe, this period includes the high season of June, July and August. Only Singaporeans and those from the United Arab Emirates are spending more.

Travellers are spending less on flights

The percentage difference in the selected redirect price in 2021 vs 2019



Methodology

Analysis is based on Skyscanner's global search and redirect data and is segmented by country. Countries include Australia, Brazil, France, Germany, Italy, India, Japan, Netherlands, Russia, Singapore, South Korea, Spain, United Arab Emirates, United Kingdom and United States.

Analysis period is March 2021 compared to March 2019 for travel between June and October in the corresponding years, unless otherwise stated.

The volumes of searches, redirects and the number of available itineraries in 2021 is lower than in 2019. Therefore analysis is based on a proportion of total, removing changes in volume over time. Analysis is not representative of a country's entire population, just those actively searching for travel.

Airfare prices are affected by supply and demand as well as seasonality. Prices may have evolved since the time of the analysis due to market changes.

Skyscanner's Pulse Survey is a weekly survey of travellers visiting Skyscanner's platforms running since March 2020 in 19 countries. N=5000 per week.

Destination rankings are calculated as follows:

» Top destinations in 2021 with the rank change vs 2019
» Trending up – top destinations in 2021 that have moved up by at least five positions vs 2019
» Passenger type – 2021 destinations with the highest share of relevant itineraries, ranked by popularity

Our 'city score' is a unique Skyscanner scoring system based on destination content from Wikivoyage and Skyscanner data. Cities are given a 'city score' from 0 to 1 – with large cities like London receiving a score of 1 and smaller cities like Palma de Mallorca receiving a lower score closer to 0.

Data analysis conducted by **Christina Tulloch** and **Marco Bertetti**. Report written by **Simon Hoskins** and designed by **Martyna Lutrzykowska.** Edits by **Matt Bradford** and **Betsy Croft.**

About our data

We collect data from every traveller search and redirect, across 295 different data points, including parameters like search and travel dates, type of journey, number of passengers and stops, cabin class, and device used.

The search is a great way of understanding the demand of a route or date, while the redirect – where the user is sent to a partner's website or purchases directly on Skyscanner – represents bookings. By capturing the time of every search and redirect – and for which travel dates – we get a clearer picture of seasonal trends in the short and longer term.

Go further with Travel Insight

Skyscanner's Travel Insight data empowers businesses by giving them insight into the search and booking behaviour of our global app and website users, as well as showing the real demand behind every flight and route.

Right now, Travel Insight is helping our partners, businesses and the wider travel industry to rapidly respond to market changes, stay one step ahead of emerging trends and travel habits, and guide their COVID-19 recovery strategies.

Find out how it could transform your business at:
partners.skyscanner.net/data/travel-insight