HORIZONS

2023-2024 Destination & Booking Insights

Skyscanner

Introduction

In this edition of Skyscanner Horizons, we share the latest travel industry and traveller behaviour trends that we're seeing on a global and regional level.

Chapter 01

Planning trends

Discover traveller spending habits and the number of trips they plan to take.

Chapter 02

Destination trends

Know the type of trips and experiences that travellers are excited to book.

Chapter 03

Booking windows

See how booking windows have changed through 2023 for travellers worldwide.

Chapter 04

Trending destinations

Find out destinations with the biggest year-on-year search increases vs 2022.

Discover the latest and greatest trends in global travel

As travel continues to flourish, how can providers and destinations meet the demand and propensity to travel in 2024?

Blending our own search and booking data with a survey of **18,000 travellers worldwide**, this report provides a unique forward-looking view of changing traveller attitudes, including spend, destination type and booking behaviour.

Travel is a top priority in 2024

The global travel industry has made big strides this year despite operational challenges like staffing and capacity restraints, as well as facing disruption from extreme weather conditions.

In aviation, there's been progress in restoring domestic and international air connectivity. In several markets, seat capacity is nearing and, in some cases, exceeding pre-pandemic 2019 levels, as airlines strive to meet sustained traveller demand.

At the same time, some destinations, such as Spain, have seen **a surge in international tourism numbers, reporting record visitors**.

In Asia-Pacific, where many destinations were slower to re-open to travellers compared to in other regions, demand is accelerating as routes and connections are restored.

We're seeing that, against a backdrop of higher average fares vs pre-pandemic, travel remains a top priority. People are continuing to ring-fence their travel budget and invest their discretionary spend in leisure trips through 2023 and into 2024.

More than ever travellers are searching for cultural experiences in 2024. From gig trippers catching their favourite band or artist abroad, to celebration vacationers creating memorable milestone moments away, travellers are letting culture drive their decision-making.

Nick Hall
CEO of Digitial Tourism Think Tank

This report is a clear demonstration that travel is well and truly back, with propensity remaining high now and into the future.

High travel propensity means destinations must focus on values and experiences. This report is a clear demonstration that travel is well and truly back, with propensity remaining high now and into the future, even amongst a climate of global economic uncertainty.

With travel spend a key priority for consumers globally, destinations, along with their industry partners, must focus on value proposition more than ever. Honing in on what sits at the very core of the destination's brand values is key to winning travellers' hearts. Yet, driving demand, with timely product proposition, is key to shaping decisions.

Marco Navarria
Global Content and Marketing Director at CAPA

Recovery from the pandemic has allowed airlines to rebuild and expand their networks to explore new and different locations.

Airlines are responding to travellers requests for niche markets. As highlighted in the 2023/24 Skyscanner Horizons report, travellers are increasingly opting for connections to smaller niche markets over the major tourist destinations of years gone by. Recovery from the pandemic has allowed airlines to rebuild and expand their networks to explore new and different locations.

This willingness to venture into new routes and build new markets supported the rebuild of global capacity to pre-pandemic levels in 2023. There are increased expectations that airlines will go beyond this in 2024, connecting the globe better than ever before.

Mike Ferguson
Director of Destination Marketing
at Skyscanner

Destination choice is increasingly influenced by personal identity.

2023 has been a seminal year in travel. In all regions we see that travellers are highly engaged in the booking and planning process, searching for destination inspiration from a variety of sources and planning long-haul trips further in advance. Destination choice is increasingly influenced by not only cultural factors but also the particular 'vibe' that aligns with individual preferences and motivations.

Hugh Aitken
VP of Strategic Relations and
Development at Skyscanner

Travellers in many markets are signalling a willingness to upgrade their fares and build customised itineraries.

Countries such as India and Turkey have outlined ambitious plans and will be important drivers of both domestic and international air connectivity in 2024 and beyond. At the same time, travellers in many markets are signalling a willingness to upgrade their fares and build customised itineraries that provide them with the best value.

A global leader in travel

We help over 100 million users* a month plan and book with ease and confidence.

Our team of experts provide trusted, industry-leading analysis to help business partners understand shifting travel behaviour, while our innovative advertising and data insight solutions help them meet their strategic objectives.

*Average monthly users, defined as the number of estimated unique users accessing Skyscanner's platforms.

Chapter 01

PLANNING TRENDS

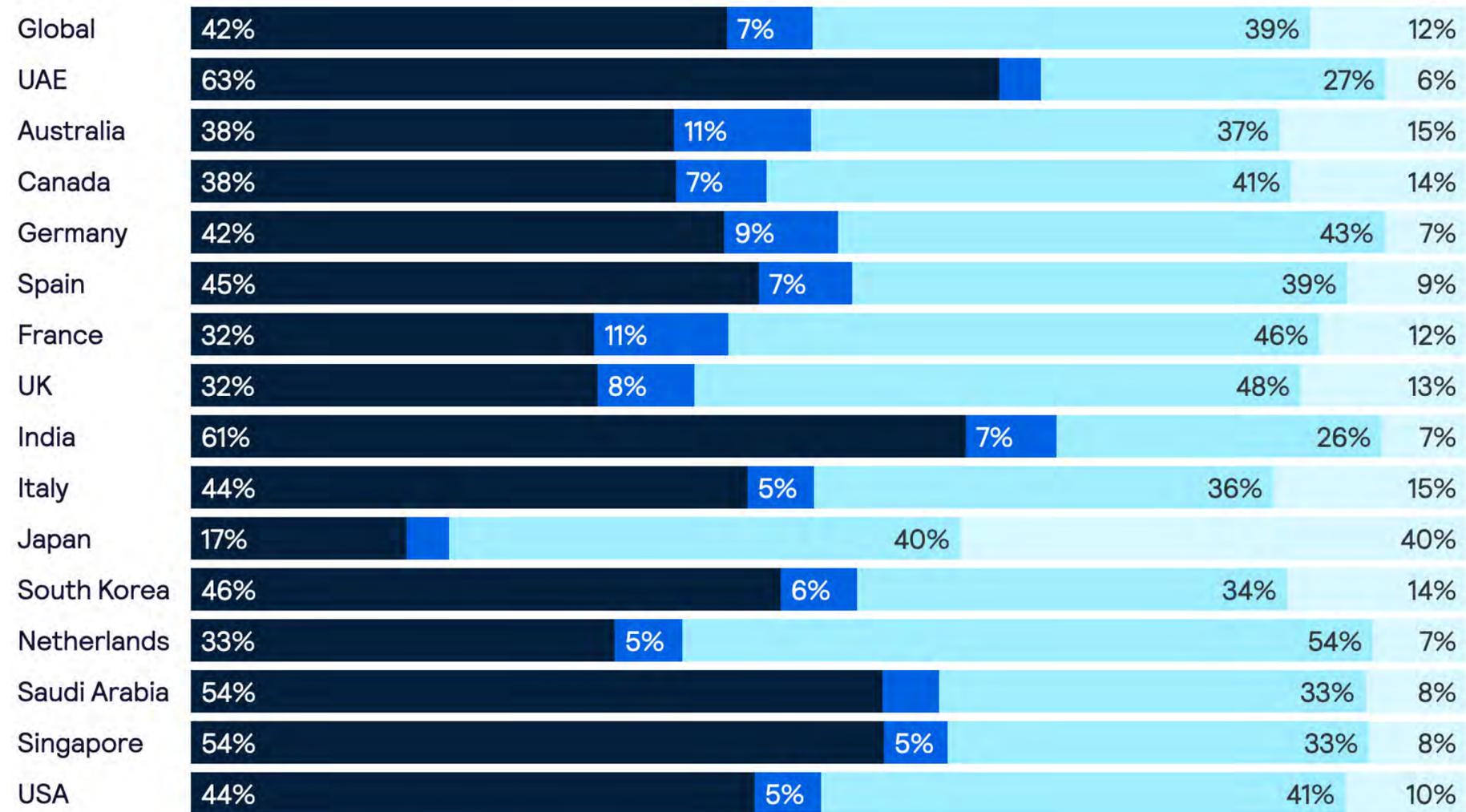# Travel and travel spend remain a top priority for people worldwide

We asked

18,000 travellers in 15 countries about their 2024 travel plans

Travel propensity in 2024

● More ● Less ● The same ● I don't know yet

Country	More	Less	The same	I don't know yet
Global	42%	7%	39%	12%
UAE	63%		27%	6%
Australia	38%	11%	37%	15%
Canada	38%	7%	41%	14%
Germany	42%	9%	43%	7%
Spain	45%	7%	39%	9%
France	32%	11%	46%	12%
UK	32%	8%	48%	13%
India	61%	7%	26%	7%
Italy	44%	5%	36%	15%
Japan	17%		40%	40%
South Korea	46%	6%	34%	14%
Netherlands	33%	5%	54%	7%
Saudi Arabia	54%		33%	8%
Singapore	54%	5%	33%	8%
USA	44%	5%	41%	10%

Q: Are you planning on vacationing abroad more, less or the same in 2024 vs 2023? n=18000

81% of travellers globally are planning to take more or the same number of trips in 2024 compared to 2023. Just under half (42%) are planning more and only 7% are planning less.
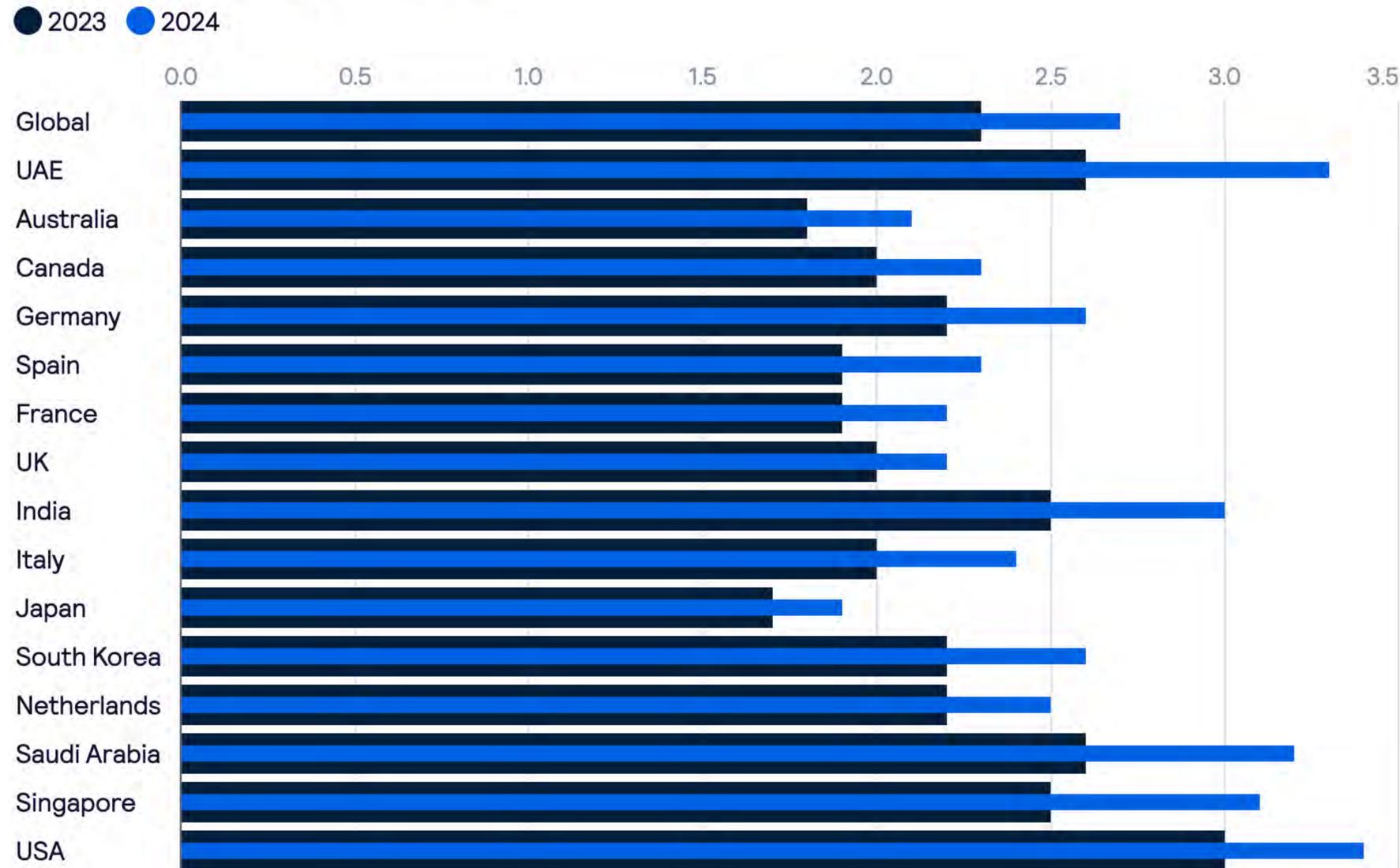
Travellers from the Middle East and Asia (UAE, India, South Korea, Saudi Arabia and Singapore) are planning the most trips, while a higher proportion of European travellers (from the likes of Germany, France, the UK and the Netherlands) have suggested they'll take a similar number of trips to 2023.

81% are planning to travel more or the same in 2024 vs 2023

42% are planning to travel more in 2024

7% are planning to travel less in 2024

Number of trips planned

● 2023 ● 2024

	0.0	0.5	1.0	1.5	2.0	2.5	3.0	3.5

Global
UAE
Australia
Canada
Germany
Spain
France
UK
India
Italy
Japan
South Korea
Netherlands
Saudi Arabia
Singapore
USA

Q: How many trips abroad did you take/do you plan to take in... – 2023/2024 n=18000

Globally, the average number of trips taken in 2023 was 2.3. US travellers took the most (3), while Japanese travellers took the least (1.7).

In 2024, **the global expected number of trips is set to increase to 2.7**. Again, Americans lead the way at 3.4. They're followed by travellers from the UAE (3.3), Saudi Arabia (3.2), Singapore (3.1) and India (3).

Japanese travellers are the most undecided. Almost half (40%) don't know if they'll travel more of less than this year. UAE travellers are the most decided – over 90% already know what their travel plans look like.
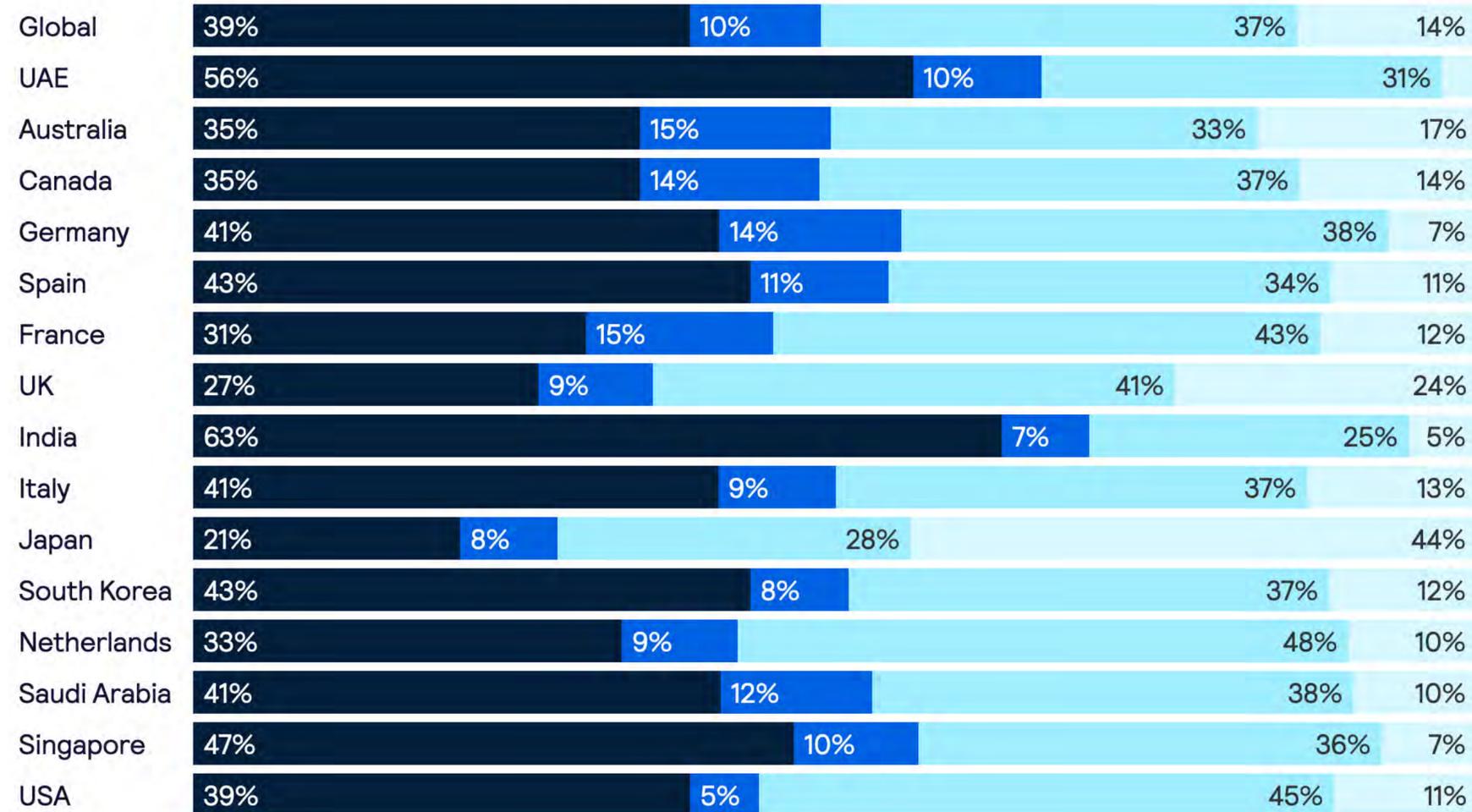
Travellers are upping their budgets

Three quarters of travellers worldwide (76%) plan to spend more or the same on travel in 2024 vs 2023, with 39% budgeting to spend more.

Travel spend in 2024

● Budgeted to spend more on travel in 2024   ● Budgeted to spend less on travel abroad in 2024   ● Budgeted to spend about the same on travel abroad in 2024   ● I don't know

	Spend more	Spend less	Spend same	Don't know
Global	39%	10%	37%	14%
UAE	56%	10%	31%	
Australia	35%	15%	33%	17%
Canada	35%	14%	37%	14%
Germany	41%	14%	38%	7%
Spain	43%	11%	34%	11%
France	31%	15%	43%	12%
UK	27%	9%	41%	24%
India	63%	7%	25%	5%
Italy	41%	9%	37%	13%
Japan	21%	8%	28%	44%
South Korea	43%	8%	37%	12%
Netherlands	33%	9%	48%	10%
Saudi Arabia	41%	12%	38%	10%
Singapore	47%	10%	36%	7%
USA	39%	5%	45%	11%

Q: Have you budgeted to spend more or less money (per person) on travel abroad in 2024 compared to 2023? n=18000

Indian travellers lead the way, with two thirds (63%) saying they'll spend more, followed by UAE travellers (56%), Singaporeans (47%), Spaniards (43%) and South Koreans (43%).

44% of Japanese and 24% of UK travellers surveyed are still unsure of their budgets for next year. While more travellers from Australia, Canada, Germany and France indicate they will spend less, compared to the global average.

What's clear across all markets, however, is that travel spend is being prioritised as **the majority of travellers will spend the same if not more than in 2023**.

When asked which flight ancillaries they'd spend their money on, the five most popular choices were:

Insurance 36%
Seat selection 36%
Better quality food 29%
Extra baggage 26%
Airport lounge access 22%
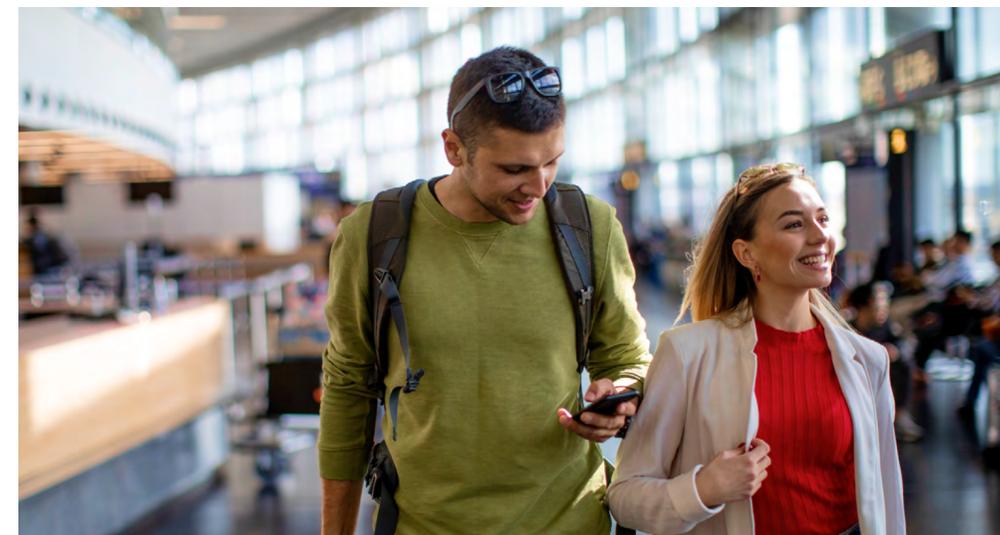
Travel spend in 2024 – ancillaries

	Insurance	Seat selection on flight	Better quality of food on flight	Extra baggage on flight	Access to airport lounge	Upgrade flight to business/ first class
Global	36%	36%	29%	26%	22%	20%
UAE	40%	42%	57%	41%	42%	37%
Australia	47%	35%	23%	21%	16%	15%
Canada	41%	43%	26%	22%	19%	18%
Germany	32%	35%	21%	23%	15%	12%
Spain	36%	30%	22%	31%	10%	15%
France	26%	24%	16%	22%	9%	8%
UK	43%	34%	14%	15%	14%	9%
India	38%	52%	65%	37%	44%	37%
Italy	32%	28%	21%	32%	10%	12%
Japan	17%	18%	10%	6%	19%	11%
South Korea	16%	44%	23%	14%	19%	22%
Netherlands	38%	36%	17%	23%	9%	12%
Saudi Arabia	27%	39%	47%	34%	36%	31%
Singapore	48%	38%	39%	32%	25%	23%
USA	37%	39%	40%	38%	39%	38%

Q: Thinking about your vacations abroad in 2024, how likely are you to spend money on any of the following? [Select all that apply] n=18000

20% of travellers also indicated a desire to upgrade to business or first class, which was particularly prevalent among Americans (38%), UAE travellers (37%) and Indians (37%).

It's clear that not only are people putting more money towards holiday spend when they're away, they're also investing towards making the whole end-to-end experience as rewarding and enjoyable as possible.

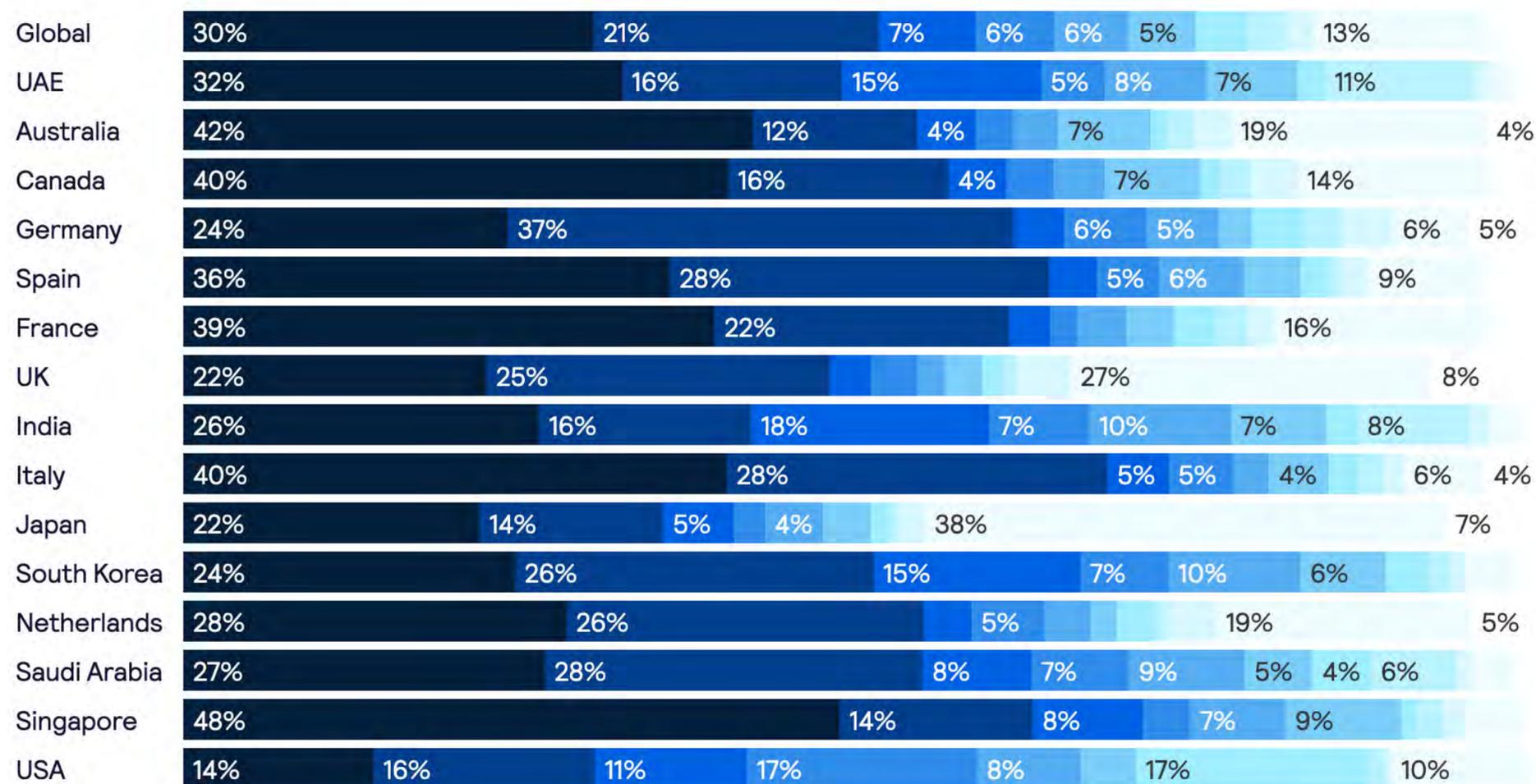# 20% of travellers plan to upgrade to business or first class

Airfares are the biggest decision-making factor

We asked travellers worldwide about the biggest factors when choosing a destination. Flights and hotels made up over half, at 30% and 21% respectively. **13% of respondents said they hadn't yet researched or booked travel for 2024.**

Cost factors when choosing a destination

Legend: ● Cost of flight ● Cost of hotel ● Cost of tourist attractions ● Cost of food and drink ● Cost of activities (e.g., shopping etc.) ● Favourable currency rate ● Cost of car hire ● Cost of a visa ● Other ● N/A; I have not researched/booked a 2024 vacation abroad ● Not sure

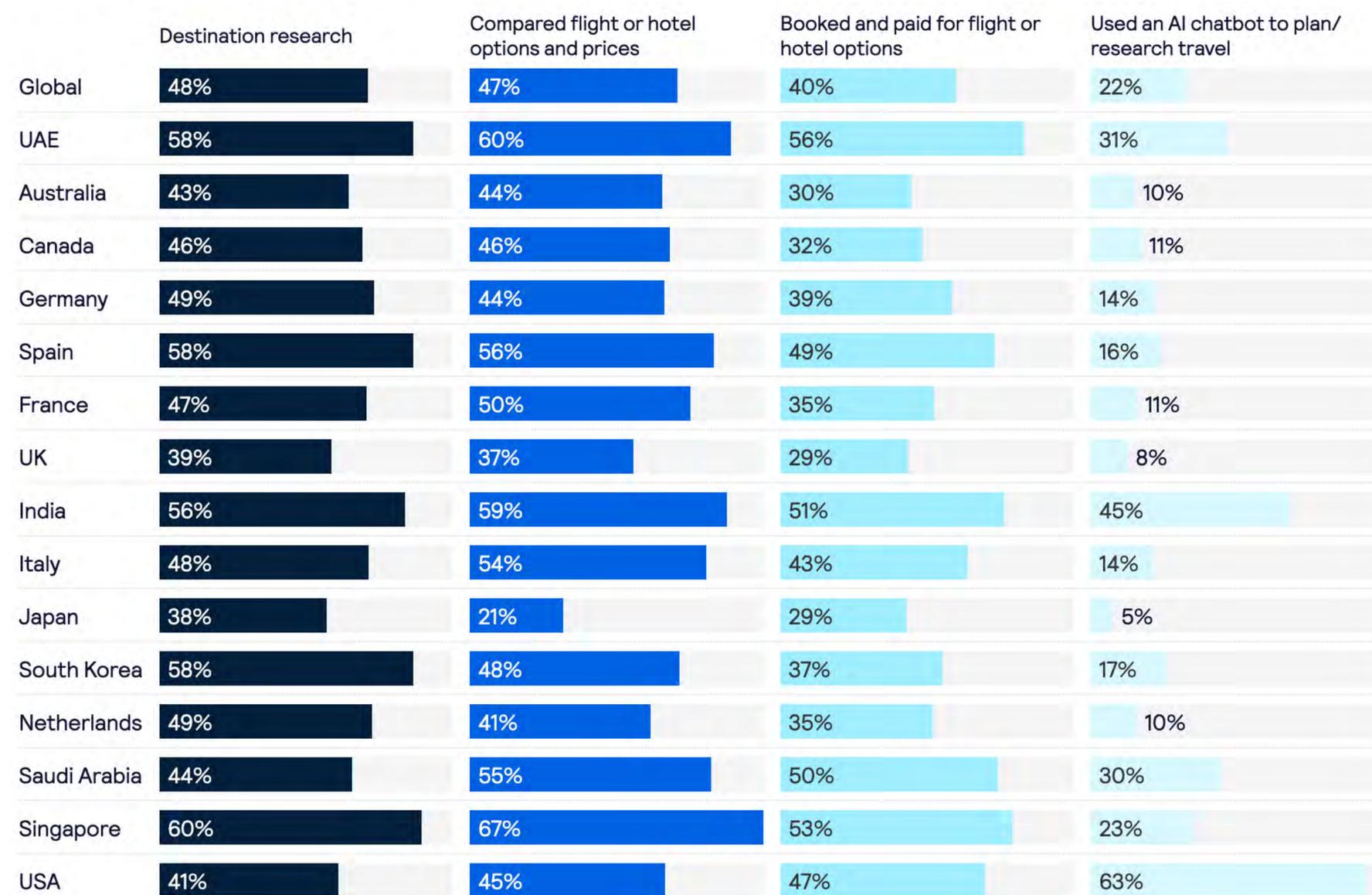|	Cost of flight	Cost of hotel	Cost of tourist attractions	Cost of food and drink	Cost of activities	Favourable currency rate	Cost of car hire	Cost of a visa	Other	N/A	Not sure
Global	30%	21%	7%	6%	6%	5%				13%	
UAE	32%	16%	15%	5%	8%	7%				11%	
Australia	42%	12%	4%	7%		19%				4%	
Canada	40%	16%	4%	7%		14%					
Germany	24%	37%	6%	5%		6%	5%				
Spain	36%	28%	5%	6%		9%					
France	39%	22%				16%					
UK	22%	25%		27%		8%					
India	26%	16%	18%	7%	10%	7%	8%				
Italy	40%	28%	5%	5%	4%		6%	4%			
Japan	22%	14%	5%	4%	38%			7%			
South Korea	24%	26%	15%	7%	10%	6%					
Netherlands	28%	26%	5%		19%			5%			
Saudi Arabia	27%	28%	8%	7%	9%	5%	4%	6%			
Singapore	48%	14%	8%	7%	9%						
USA	14%	16%	11%	17%	8%	17%			10%		

Q: When researching/booking your 2024 vacation abroad, which cost factor mostly determines your choice of destination? n=18000

Australian, Canadian, Spanish, French, Italian and Singaporean travellers rated flight costs as their top cost factor, significantly above the global average. On the other hand, German, Spanish, UK, South Korean, Dutch and Saudi Arabian travellers said hotel costs were either the joint or single most important factor.

US travellers rated the cost of food and drink (17%) and car hire (17%) as their joint top cost factors. The cost of attractions was also a top factor for travellers from the UAE (15%), India (18%) and South Korea (15%).

For one in ten Indian and South Korean travellers, the cost of activities, such as shopping, is also an important cost consideration.

Planning and booking on a mobile device

	Destination research	Compared flight or hotel options and prices	Booked and paid for flight or hotel options	Used an AI chatbot to plan/ research travel
Global	48%	47%	40%	22%
UAE	58%	60%	56%	31%
Australia	43%	44%	30%	10%
Canada	46%	46%	32%	11%
Germany	49%	44%	39%	14%
Spain	58%	56%	49%	16%
France	47%	50%	35%	11%
UK	39%	37%	29%	8%
India	56%	59%	51%	45%
Italy	48%	54%	43%	14%
Japan	38%	21%	29%	5%
South Korea	58%	48%	37%	17%
Netherlands	49%	41%	35%	10%
Saudi Arabia	44%	55%	50%	30%
Singapore	60%	67%	53%	23%
USA	41%	45%	47%	63%

Q: Which of the following travel planning and booking actions have you done on a mobile device (phone/ tablet) in the last 6 months? [Select all that apply] n=18000

Nearly half of travellers have undertaken destination research (48%) and compared flights (47%) on a mobile device, with 40% booking travel.

Those from the UAE, Spain, India, South Korea, Saudi Arabia and Singapore are the most likely to book on a mobile device.

Australian, Canadian, Japanese, Dutch and UK travellers are less likely to use a mobile device for planning and booking travel.

According to the survey, **over a fifth (22%) of travellers globally have sought the help of an AI chatbot to plan and research where to go**.

American and Indian travellers are significantly above the global average, with UAE and Saudi Arabian travellers also above average.

The countries where AI has been used the least are Japan, the UK, the Netherlands and Australia.

22%

of travellers worldwide have used AI to help them plan and research travel

Chapter 02

DESTINATION TRENDS

Cultural experiences top the 2024 agenda

Culture vultures take flight

More than ever, travellers next year will be seeking out cultural experiences. If last year was about the freedom of 'revenge travel' after Covid restrictions lifted, then 2024 is about visiting destinations which inspire a certain feeling.

Though value for money remains top of mind, **travellers are increasingly letting culture drive their decision making** – from gig trippers wanting to be moved by music, to analogue adventurers switching off from the 'always on'.

46% of travellers choose a destination to discover the local cuisine

42% of travellers love to explore a destination on a cultural tour

41% of travellers pick a destination based on its overall vibe

Travellers are following their stomachs

Destination choice is also influenced by the type of activities on offer. Globally, travellers surveyed rated the following as the top five in-destination activities:

Sampling local food 46%
Sightseeing 42%
Beach 40%
Shopping 39%
Sleeping 27%

In-destination activities

	Sampling local food	Sightseeing	Hitting up the beach	Shopping/ retail therapy	Sleeping	Nightlife	Hiking	Water sports	Wildlife spotting	Heading to an art gallery
Global	46%	42%	40%	40%	27%	24%	24%	22%	21%	19%
UAE	36%	44%	40%	48%	24%	35%	26%	30%	27%	19%
Australia	56%	50%	39%	49%	31%	23%	17%	18%	24%	22%
Canada	53%	48%	49%	48%	31%	26%	24%	22%	19%	20%
Germany	49%	30%	58%	44%	31%	29%	28%	29%	16%	12%
Spain	57%	56%	52%	25%	30%	32%	26%	18%	18%	21%
France	57%	57%	30%	40%	27%	25%	42%	19%	18%	14%
UK	52%	43%	40%	30%	32%	19%	18%	13%	20%	14%
India	38%	45%	38%	49%	20%	37%	23%	36%	37%	26%
Italy	50%	37%	46%	25%	24%	25%	51%	17%	22%	28%
Japan	21%	34%	12%	41%	18%	6%	10%	9%	6%	10%
South Korea	49%	33%	43%	37%	21%	13%	9%	25%	10%	20%
Netherlands	57%	46%	56%	41%	39%	18%	21%	22%	19%	13%
Saudi Arabia	35%	38%	50%	42%	22%	32%	34%	25%	28%	23%
Singapore	54%	46%	31%	58%	23%	28%	23%	22%	19%	17%
USA	27%	28%	28%	27%	24%	25%	22%	30%	24%	26%

Q: Which of the following activities do you plan to participate in on your next vacation? [Select all that apply] n=18000

Trying local food is the top choice for travellers from Australia (56%), Canada (53%), France (57%), the UK (52%), South Korea (49%), the Netherlands (57%) and Singapore (54%).

Over half of Australian, Spanish and French travellers also regard sightseeing as a top activity. Similarly, beach activities are the most popular for German (58%), Spanish (52%), Dutch (56%) and Saudi Arabian (50%) travellers.

Americans rated a lot of activities equally, while **Japanese travellers favoured road trips more than other nationalities**.

Factors affecting destination choice

Legend: ● The weather ● The food ● The culture ● The attractions ● The vibe

	The weather	The food	The culture	The attractions	The vibe
Global	60%	58%	54%	49%	41%
UAE	68%	61%	60%	64%	42%
Australia	65%	56%	55%	65%	29%
Canada	70%	63%	57%	61%	37%
Germany	63%	57%	49%	38%	49%
Spain	64%	60%	59%	24%	46%
France	59%	51%	57%	30%	43%
UK	69%	57%	55%	53%	27%
India	65%	71%	65%	63%	43%
Italy	60%	53%	59%	52%	43%
Japan	33%	65%	47%	18%	43%
South Korea	38%	56%	43%	57%	43%
Netherlands	67%	58%	60%	26%	57%
Saudi Arabia	64%	63%	54%	48%	57%
Singapore	66%	75%	58%	70%	41%
USA	45%	46%	44%	45%	40%

Q: Which, if any, of the following factors are important to you when picking a vacation destination? [Select all that apply] n=18000

We asked travellers globally what their top five factors were when picking a destination. They said:

Weather 60%
Food 58%
Culture 54%
Attractions 49%
Vibe 41%

54% of travellers are drawn to the culture of a destination

Globally, YouTube is the top source of travel inspo

Social and online platforms are providing huge sources of inspiration for travellers worldwide, with influence differing country by country.

YouTube tops the list globally, with **almost half (40%) of travellers watching videos to discover their next trip.**

56%

of our users come to Skyscanner every month without a destination in mind, looking to be inspired

Sources of travel inspiration

	YouTube	Word of mouth recommendations	Instagram	Online media	Guidebooks	Film and TV	Facebook	TikTok	Books	Print media
Global	40	35	33	27	27	26	26	21	19	19
USA	33	30	32	31	26	29	31	29	26	31
UK	21	43	20	22	23	28	15	8	19	19
UAE	67	31	58	39	19	28	53	45	22	19
South Korea	56	27	32	24	16	30	13	12	16	9
Singapore	64	41	54	34	16	25	41	38	11	13
Netherlands	31	31	23	29	37	20	22	15	16	13
Saudi Arabia	57	27	44	22	29	25	27	45	17	14
Japan	32	19	17	30	45	26	8	4	29	20
Italy	33	26	34	22	40	25	23	21	21	21
India	79	31	64	49	25	39	57	0	32	32
France	24	40	18	18	41	11	20	12	16	14
Spain	37	38	39	23	29	24	20	23	17	14
Germany	34	38	37	22	30	28	17	30	16	15
Canada	39	48	31	28	19	22	25	24	16	19
Australia	31	46	22	24	19	28	25	14	14	20

Q: Which, if any, of the following sources do you use as inspiration for travel? [Select all that apply] n=18000

YouTube is followed by more traditional word-of-mouth recommendations (35%) and then, close behind, Instagram (33%).

Other social platforms like Facebook (26%) and TikTok (21%) also make the top 10 – and they're used the most by travellers from the UAE, Singapore, Saudi Arabia and India for travel inspiration.

In many other markets, more traditional media like guidebooks are still very popular. Globally, they still beat Facebook, TikTok and other printed media – and especially in Japan, the Netherlands and France. UK **travellers still rely heavily on word of mouth**.

2024's trending travel vibes and types

Skyscanner has identified seven travel vibes and trip types that travellers worldwide are seeking in 2024:

01
Gig tripping

Catching their favourite band or artist abroad.

02
Main character energy

Embracing the cultural zeitgeist and stepping into the shoes of their favourite on-screen character.

03
Destination zzzz

Being attune to the rising trend of sleep tourism to switch off from the modern world.

04
Budget bougie foodie

Finding value in eating the best local cuisine and authentic food, even at Michelin-starred restaurants.

05
Analogue adventurers

Gen Z travellers are craving old-school getaways, using old tech to help them disconnect and slow down.

06
Celebration vacationers

Creating memorable milestone moments in group trips away with friends and family.

07
Lux-for-less seekers

Finding luxury where they can, within their budget.

Chapter 03

BOOKING WINDOWS

EMEA travellers are booking flights further in advance

Travellers from EMEA continue to book over 90 days ahead for both short-haul and long-haul trips, tracking above 2022 levels.

Short haul

The majority of travellers in EMEA are booking short-haul flights within 30 days of departure – which is slightly below 2022 levels: 34% in 2023 compared to 37% last year.

The 90+ day booking window has been trending above 2022 levels so far this year. After the expected dip in summer, it's picked back up again and is tracking at +3% year-on-year with a 15% share.

% of searches for booking window segments in 2023 YTD, with selected comparisons to 2022
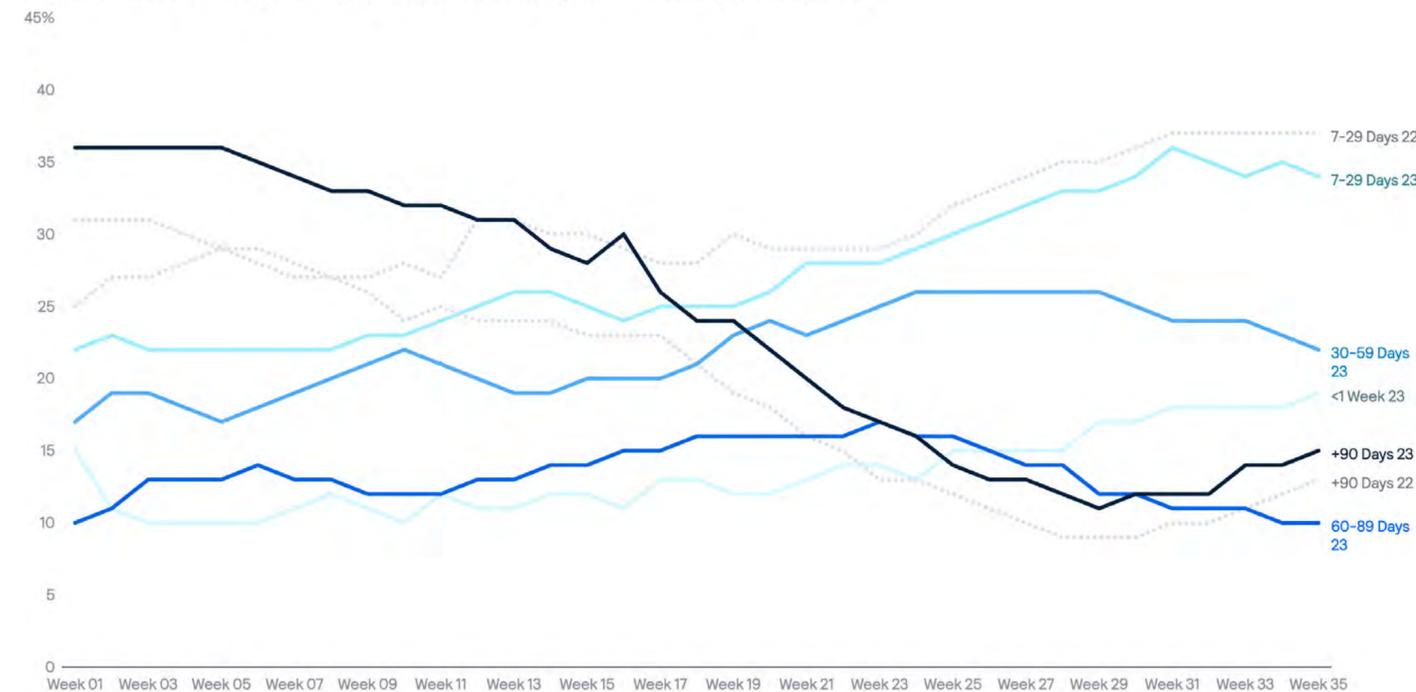
Long haul

Throughout 2023, the 90+ day booking window share has been higher compared to 2022 and as of week 35, it's tracking at 32% vs 30%.

The medium length windows of 30-59 days and 60-89 days are more stable this year compared to last year, with less volatility.

Overall, **every booking window is normalising** after a few years of irregularity caused by the pandemic as travellers negotiated restrictions lifting or put in place as destinations opened and closed.

% of searches for booking window segments in 2023 YTD, with selected comparisons to 2022
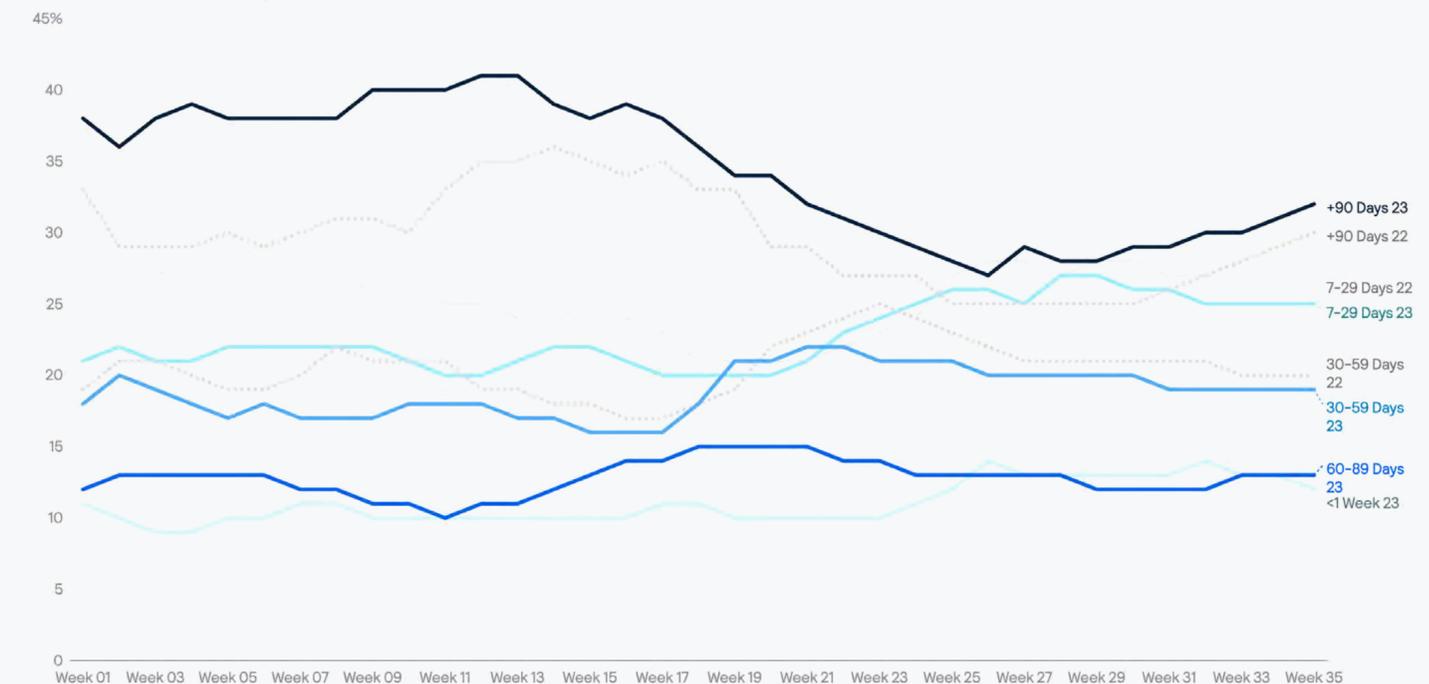
34%

of travellers in EMEA are booking short-haul flights within 30 days of departure

32%

of EMEA travellers are booking long haul at least three months in advance vs 30% last year
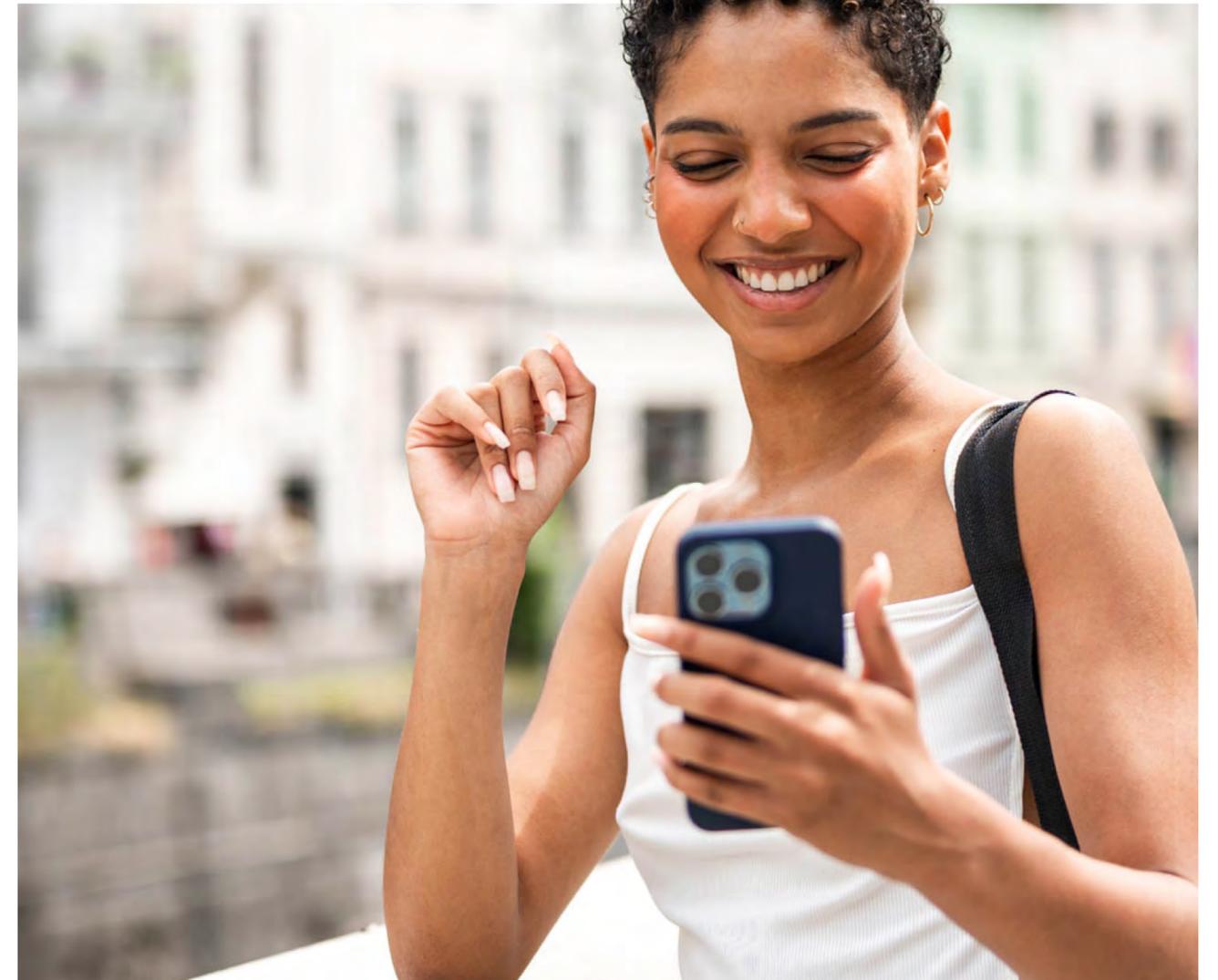
Domestic

The most popular booking window for people travelling domestically is 7-29 days, which closely mirrors what was happening during 2022.

The shortest booking window of less than a week increased over the summer in line with seasonality as **travellers planned and booked last-minute escapes**.

Broadly speaking, over the past five weeks, all windows are in line with how they were in 2022 – indicating similar forward-booking patterns to last year.

% of searches for booking window segments in 2023 YTD, with selected comparisons to 2022

Chart legend: 7-29 Days 22, 7-29 Days 23, <1 Week 23, 30-59 Days 23, +90 Days 23, +90 Days 22, 60-89 Days 23

X-axis: Week 01, Week 04, Week 07, Week 10, Week 13, Week 16, Week 19, Week 22, Week 25, Week 28, Week 31, Week 34

Y-axis: 0, 5, 10, 15, 20, 25, 30, 35, 40, 45%

EMEA domestic travellers prefer to book 7–29 days in advance

AMER travellers are booking further ahead for long haul

Forward booking patterns are normalising, with 90+ day booking windows for long-haul flights exceeding 2022 levels.

Short haul

Through 2023, a similar proportion of travellers in AMER are choosing to book their flights between 7 and 29 days in advance, in line with 2022 profiles.

At the other end of the spectrum, the 90+ days booking window – the second largest share this year – has continued to outpace its share in 2022. It's now the most popular booking window as of week 35, up 2% on 2022.

Other windows are normalising in line with 2022, except for a spike in bookings of less than a week during week 27 – which was likely driven by last-minute travel in the US for the Fourth of July.

% of searches for booking window segments in 2023 YTD, with selected comparisons to 2022
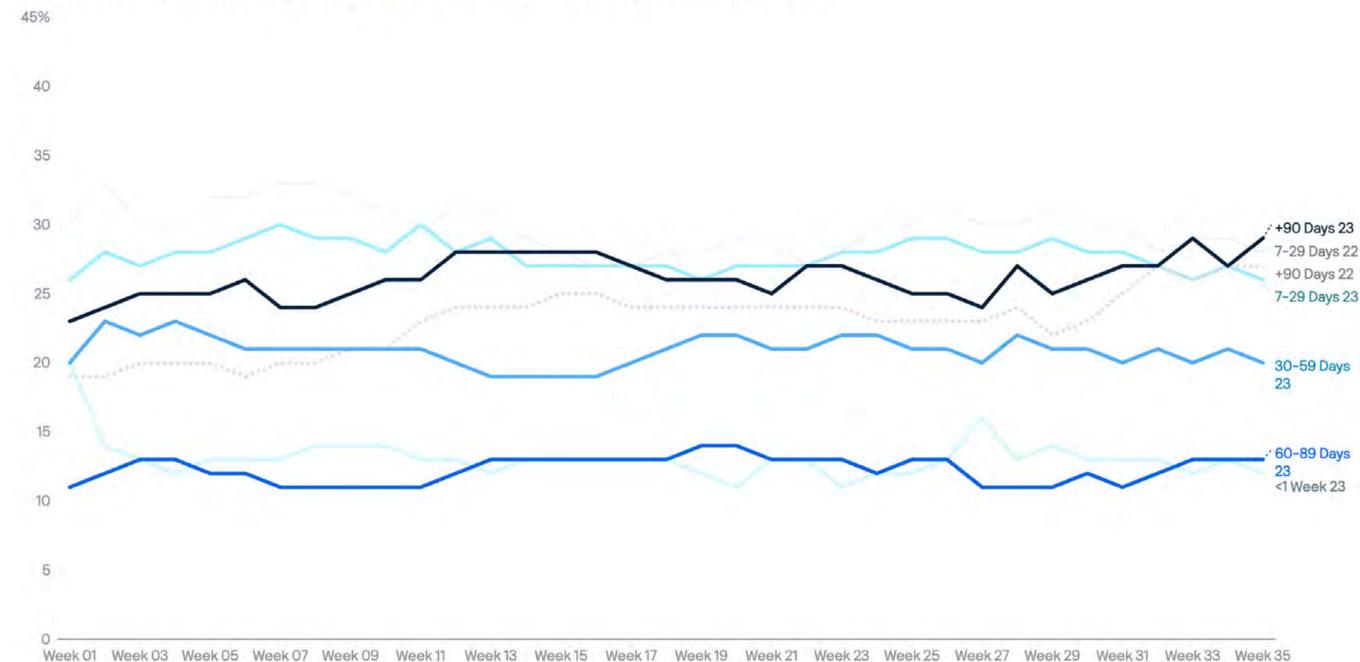
Long haul

90+ days has consistently tracked well above 2022 across the whole year, with nearly a 40% share, up 4% from last year – indicating that **travellers in AMER are more confident booking bigger trips further ahead in time**.

At the same time, 90+ days has been trending upwards from week 34 and the 7-29 day window has been trending down – and, as of week 35, holds a 2% lower share than in 2022.

Other windows have now normalised and are tracking on par with 2022.

% of searches for booking window segments in 2023 YTD, with selected comparisons to 2022
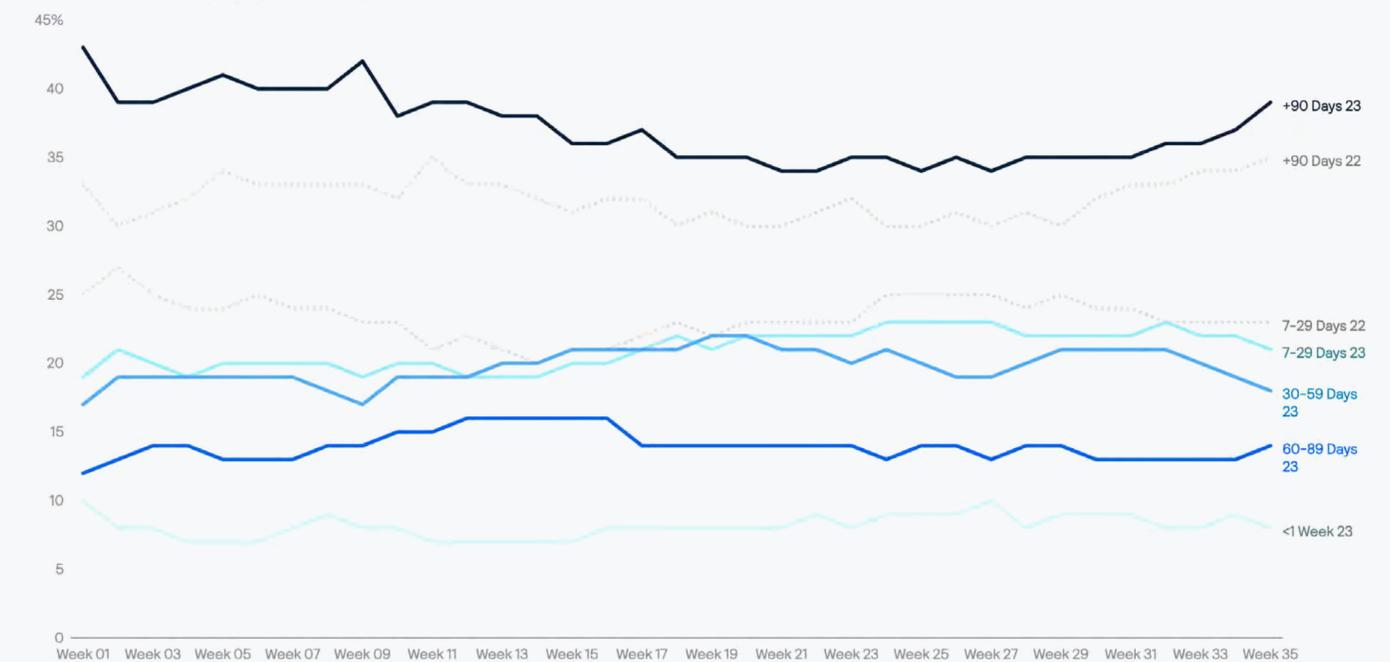
40% of AMER travellers are booking long-haul flights more than 90 days in advance, up 4% on last year.
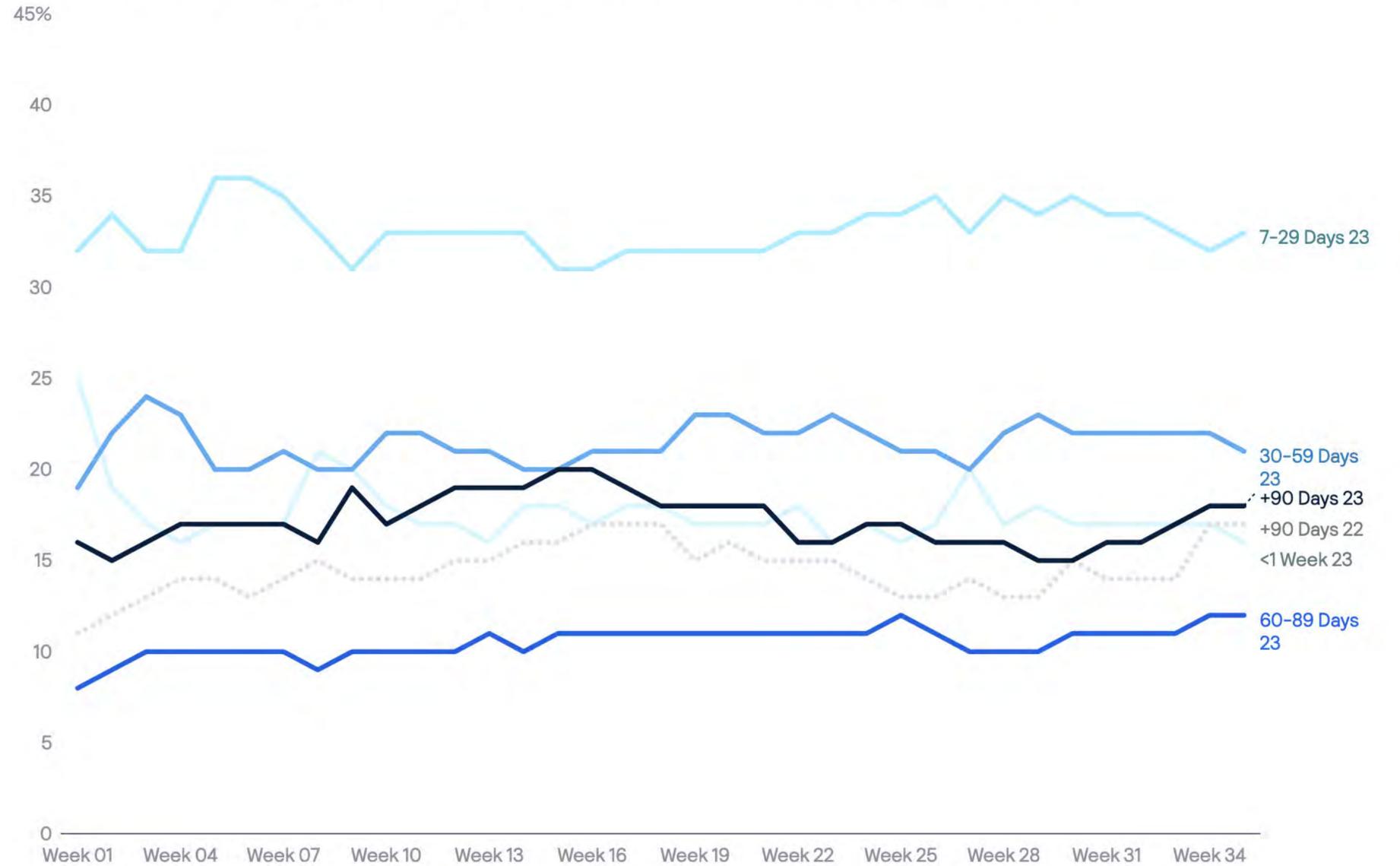
Domestic

Easily the most popular booking window for flying domestically is 7-29 days, which is tracking inline with 2022 with roughly a third of the overall share.

The shortest window of less than a week has been trending lower than last year as **more travellers favour booking further ahead in time, even for internal flights.**

For most of the year, 90+ days was tracking higher than it was in 2022, as more people booked over three months ahead. As of week 35, however, it's tracking alongside 2022 levels.

% of searches for booking window segments in 2023 YTD, with selected comparisons to 2022

Legend labels: 7-29 Days 23, 30-59 Days 23, +90 Days 23, +90 Days 22, <1 Week 23, 60-89 Days 23

X-axis: Week 01, Week 04, Week 07, Week 10, Week 13, Week 16, Week 19, Week 22, Week 25, Week 28, Week 31, Week 34

Y-axis: 0, 5, 10, 15, 20, 25, 30, 35, 40, 45%

The majority of AMER travellers book domestic flights between 7–29 days in advance

Booking windows are normalising for APAC travellers

Despite some volatility, booking windows are becoming more stable and returning to 2022 levels.

Short haul

There continues to be greater volatility in all short-haul booking windows in APAC compared to other regions.

Travellers in Asia-Pacific are choosing to book their domestic flights between 7-29 days before departure. This is a similar trend to last year, but 2023 is relatively more stable.

After tracking below 2022 for a number of weeks, **there's been a recent surge in last-minute bookings** (less than a week) from August. As of week 35, medium-length bookings of 60-89 days have been trending slightly higher than in 2022, at 3% – indicating a small rise in the number of travellers who are more confident to book travel further in advance.

% of searches for booking window segments in 2023 YTD, with selected comparisons to 2022
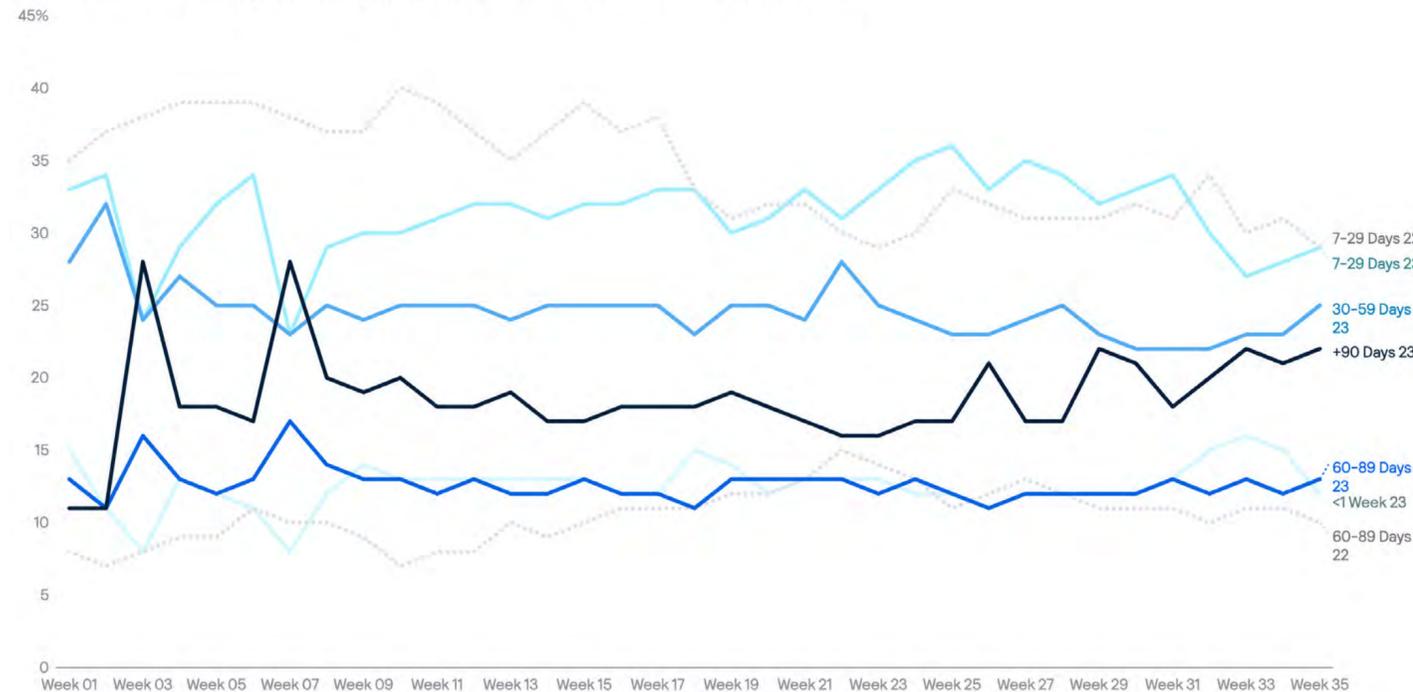
Long haul

More travellers are booking further in advance than they were last year. The booking window of 90+ days comprises more than a quarter of total bookings, at a 28% share – 2% more than the same time in 2022.

On the other hand, however, almost one third of travellers (30%) are booking their long-haul flights within 30 days of departure.

All other windows are normalising and acting how we'd expect them to at this time of the year.

% of searches for booking window segments in 2023 YTD, with selected comparisons to 2022
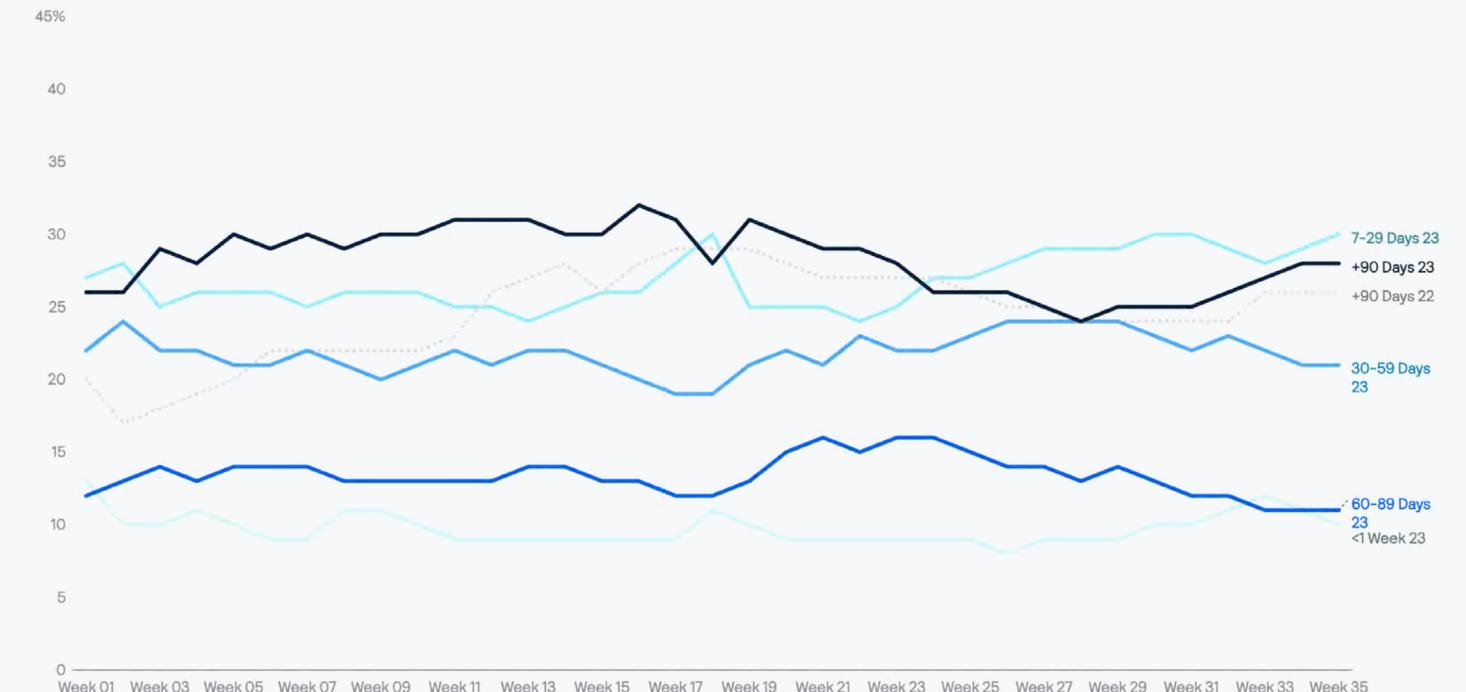
There's **greater volatility in all short-haul booking windows** in APAC when compared to other markets.

30%

of travellers in APAC are booking long-haul flights within 30 days of departure
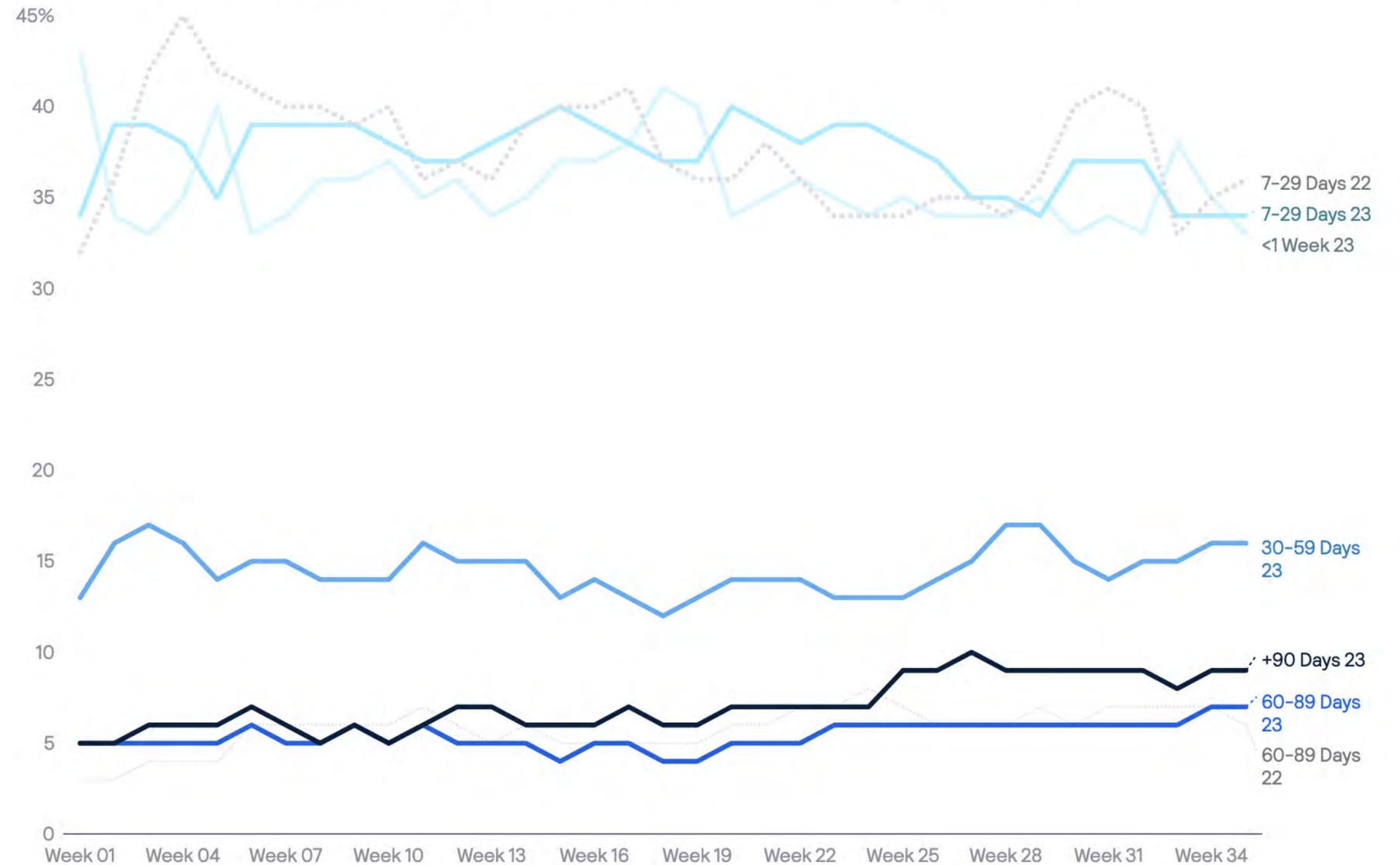
Domestic

Overall, domestic booking windows are following a similar pattern to 2022.

The majority of travel is being booked in the short term, less than 30 days before departure, as travellers favour waiting to buy tickets nearer their departure date.

Although booking windows of 90+ days make up a small percentage share as of week 35, there's some movement from last year at +3%.

% of searches for booking window segments in 2023 YTD, with selected comparisons to 2022

7-29 Days 22
7-29 Days 23
<1 Week 23
30-59 Days 23
+90 Days 23
60-89 Days 23
60-89 Days 22

Week 01 Week 04 Week 07 Week 10 Week 13 Week 16 Week 19 Week 22 Week 25 Week 28 Week 31 Week 34

Chapter 04

TRENDING DESTINATIONS

EMEA travellers are searching for hidden gems

The top 10 destinations with the biggest year-on-year increases in searches for travel, compared to the same period in 2022, are:

1. **Rayong,** Thailand

2. **Ouarzazate,** Morocco

3. **Pristina,** Kosovo

4. **Klagenfurt,** Austria

5. **Castletown,** Isle of Man

6. **Wenzhou,** China

7. **Riyadh,** Saudi Arabia

8. **Osijek,** Croatia

9. **Warsaw,** Poland

10. **Samarkand,** Uzbekistan

📍 Rayong, Thailand

Warsaw, Poland

Ouarzazate, Morocco

5/10

trending destinations for EMEA travellers are within Europe

Klagenfurt, Austria

Travellers in EMEA are seeking out smaller **hidden gems away from the larger cities** and better known, more touristy areas.

Rayong offers sunseekers and families beach retreats and islands to explore, while Klagenfurt is on the shores of Austria's Lake Wörthersee, one of Europe's largest and warmest Alpine lakes.

Castletown and Ouarzazate, on the other hand, provide travellers with rich history and small-town vibes – one an ancient capital, the other a gateway to the Sahara.

Spotlight on
Saudi Arabia

Top trending cities worldwide for Saudi Arabian travellers in 2023.

The top trending destinations for Saudi Arabians are predominately within Europe, with nine of the top 10 being spread across the continent – from London in England to Larnaca in Cyprus, and from Brussels in Belgium to Bucharest in Romania. Italy features three times with Venice, Rome and Italy.

There's only one destination outside of Europe and that's New York.

1. **Bucharest,** Romania
2. **Larnaca,** Cyprus
3. **Venice,** Italy
4. **Vienna,** Austria
5. **Rome,** Italy

6. **Barcelona,** Spain
7. **Brussels,** Belgium
8. **Milan,** Italy
9. **London,** UK
10. **New York,** USA

Long-haul booking windows

Booking windows for Saudi Arabian travellers are broadly following a similar pattern to 2022, albeit with some slight variations. While 7-29 days continues to take the greatest share of forward bookings (35%), it's down 5% YoY.

Booking windows of less than a week have also been tracking higher in H2, suggesting **the majority of Saudi Arabian travellers are booking long-haul travel at short notice**.

Saudi Arabia long haul
% of searches for booking window segments in 2023 YTD, with selected comparisons to 2022
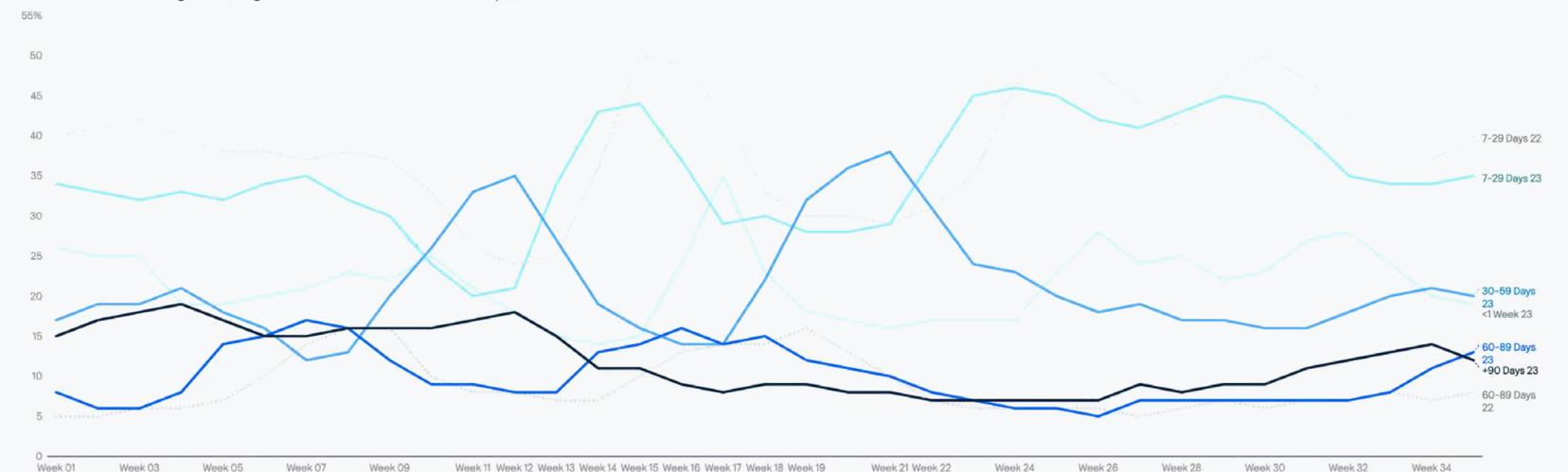
AMER travellers are looking east towards Asia

The top 10 destinations with the biggest year-on-year increases in searches for travel, compared to the same period in 2022, are:

1. **Joinville,** Brazil

2. **Campina Grande do Sul,** Brazil

3. **Sapporo,** Japan

4. **Cayman Islands**

5. **Osaka,** Japan

6. **Tokyo,** Japan

7. **Bucharest,** Romania

8. **Beijing,** China

9. **Taipei,** Taiwan

10. **Bermuda**

Tokyo, Japan

There's a strong desire for travellers from the Americas to return to the East, with Asian cities taking five of the top 10 spots.

Japanese cities feature strongly, with Sapporo, Osaka and Tokyo in the top six as travellers take advantage of the country's more recent re-opening. Other cities along the far east of the continent include the capitals of Beijing and Taipei.

Large, second-tier cities in Brazil's south and northeast make up the second and third spots.

AMER travellers are also **searching for their island paradise** – the Cayman Islands and Bermuda, though both small in size, are packed with beach resorts, long sunny days and activities like water sports.

Beijing, China

Cayman Islands

United States of America

Top trending cities worldwide for American travellers in 2023.

American travellers are searching for stunning island getaways – from the Caribbean's Cayman Islands, US Virgin Islands, St Maarten and Aruba, to the South Pacific's French Polynesia and Bermuda in the north Atlantic. Outside of beach paradises, the Japanese cities of Osaka and Tokyo, as well as Taiwan's capital Taipei, are popular. Bucharest, again, is surging in popularity.

1. **Cayman Islands**

2. **French Polynesia**

3. **Osaka,** Japan

4. **Tokyo,** Japan

5. **US Virgin Islands**

6. **Bucharest,** Romania

7. **Bermuda**

8. **Taipei,** Taiwan

9. **St Maarten**
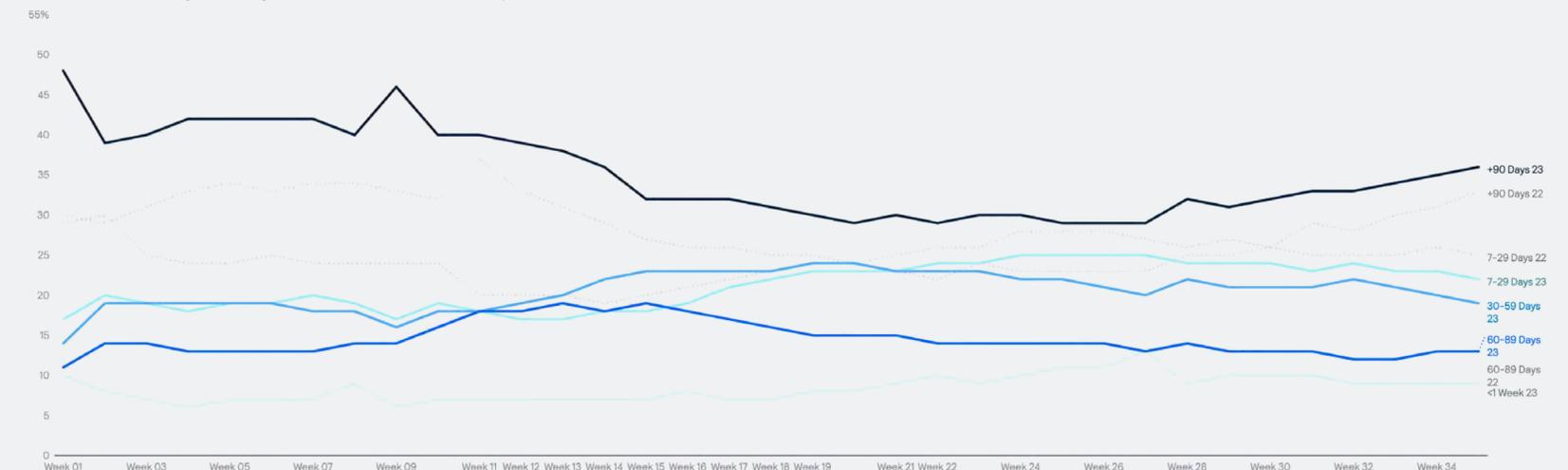
10. **Oranjestad,** Aruba

Long-haul booking windows

When looking at long-haul bookings for American travellers, the 90+ day window has been tracking higher this year vs 2022 and, as of week 35, was +3% higher – with the greatest share of forward bookings (36%).

Other booking windows are now tracking in line with 2022 levels, except for some spikes for less than a week – evident of last-minute holiday travel like Fourth of July.

USA long haul
% of searches for booking window segments in 2023 YTD, with selected comparisons to 2022

Line chart: y-axis from 0 to 55%, x-axis labelled Week 01 through Week 34. Series labelled +90 Days 23, +90 Days 22, 7-29 Days 22, 7-29 Days 23, 30-59 Days 23, 60-89 Days 23, 60-89 Days 22, <1 Week 23.

APAC travellers have their hearts set on Japan

The top 10 destinations with the biggest year-on-year increases in searches for travel, compared to the same period in 2022, are:

1. **Kitakyushu,** Japan

2. **Shizuoka,** Japan

3. **Macau, China**

4. **Okayama,** Japan

5. **Kaohsiung,** Taiwan

6. **Saga,** Japan

7. **Fukuoka,** Japan

8. **Can Tho,** Vietnam

9. **Takamatsu,** Japan

10. **Taipei,** Taiwan

Taipei, Taiwan

Japanese destinations dominate the top 10 list, featuring six times – with three in the top five. But they're not the big hitters – these places are smaller Japanese cities, most commonly prefecture capitals and gateways to their region.

It's evident of Japan's recent bounce back after the country lifted its remaining Covid restrictions earlier this year, making international and domestic travel far more straightforward.

Outside of Japan, there are the popular hotspots of Macau and Taipei. But they're surrounded by smaller, second- and third-tier cities – as travellers look to explore beyond the better-known destinations.

Can Tho, for example, a small city at the heart of south Vietnam's Mekong Delta, sits in eighth place. While Kaohsiung, a bustling port on Taiwan's southern coast and the country's second most populated city, is in fifth.

6/10

trending destinations for APAC travellers are in Japan, with three in the top five

Mount Fuji, Japan 📍

Spotlight on

India

Top trending cities worldwide for Indian travellers in 2023.

The top trending cities for Indian travellers reveal a mix of destinations and holiday types. There are the two cultural capitals of Central Asia: Almaty and Baku, which mix tradition with modern flair. Then there are the beautiful beaches and coastal resorts of Vietnam's Da Nang, Thailand's Krabi and Seychelles' Mahé island, a jumping off point to the quieter parts of the Indian Ocean archipelago.

Once again, the city of Osaka – famed for its nightlife and food scene – makes the top 10. Indians are also looking to visit Vienna and Auckland.

1. Da Nang, Vietnam

2. Almaty, Kazakhstan

3. Baku, Azerbaijan

4. Osaka, Japan

5. Hanoi, Vietnam

6. Krabi, Thailand

7. Budapest, Hungary

8. Mahé Island, Seychelles

9. Vienna, Austria

10. Auckland, New Zealand

Long-haul booking windows

Much like 2022, the majority of Indian travellers are booking long-haul flights within 30 days of departure, with the 7-29 day window taking the greatest share (41%),

despite a lower share at the start of the year. 90+ day windows were tracking higher YoY and have since normalised, along with other booking windows.

India long haul
% of searches for booking window segments in 2023 YTD, with selected comparisons to 2022
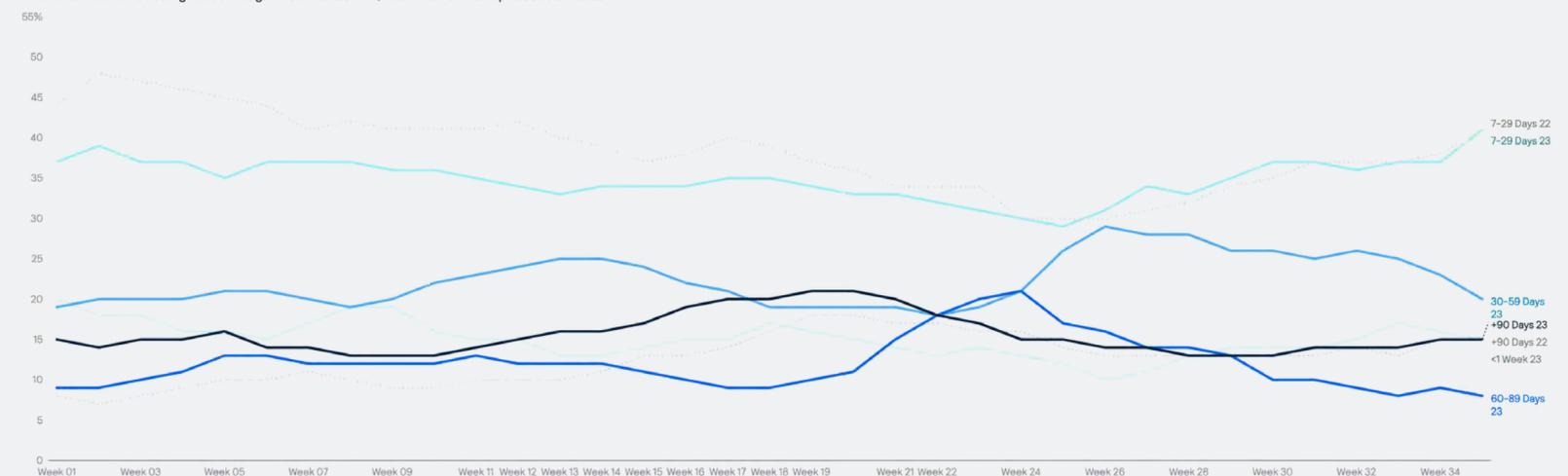
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