HORIZONS

Destination & Booking Insights – Q1 2023

Skyscanner

Where's trending and when are travellers booking

In this edition, we reveal the world's top trending destinations from March to September and how booking windows have changed in Q1 2023.

We've broken down each trend for EMEA, APAC and AMER, so you can discover where travellers in each region want to go and how far ahead they're booking.

Travellers are looking east as global air connections are restored and long-haul booking windows lengthen.

Introduction

Despite a backdrop of higher fares, we're seeing strong demand as travel remains a top priority.

Booking windows

Discover how booking windows for travellers worldwide have evolved through Q1 2023.

Trending destinations

Find out the top 10 destinations with the biggest year on-year increase in searches from each region.

INTRODUCTION

A global leader in travel

Skyscanner is a global leader in travel, helping over 100 million travellers 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.

Travel's momentum continues in 2023

We've seen strong and continued demand for all travel types across Q1 this year as record numbers of travellers search for inspiration for their next trip, comparing dates and destinations to find the best deals. Despite a backdrop of higher airfares and a challenging economic climate for some, travelling internationally is a top priority for many people across the world.

Destinations in Asia-Pacific feature heavily in searches globally as travellers show a desire to return to the East after the easing of restrictions across the region. Fuelling this demand is a combination of VFR (visiting friends and relatives) and leisure travel.


Unique monthly visitors to Skyscanner's platforms now exceed more than 100 million.
100M+

Over half of travellers are exploring, with no fixed dates or destinations in mind.

Travel's momentum continues post-pandemic as global tourism re-emerges. The sector is capitalising on opportunities from new and returning air connectivity, as well as growing interest from people in prioritising travel spend and the unique experiences travel creates.

At Skyscanner, we're lucky to witness these changes firsthand. Our marketplace connects more than 100 million travellers every month to thousands of travel providers and destination marketing organisations.

Laos

+367%

YoY growth in searches from EMEA travellers

Everywhere

+701%

YoY growth in searches from APAC travellers

Japan

+266%

YoY growth in searches from AMER travellers

"Globally, we're seeing more travellers come to Skyscanner than ever before. It's indicative of both the sector's continued recovery and the exceptional travel demand across all regions.

Destinations, particularly in APAC, are benefitting from increased search volumes and, at the same time, long-haul booking windows are lengthening. Long-haul international travel has been slower to recover than other segments, but 2023 looks set to change that."

Mike Ferguson

Director of Destination Marketing
Skyscanner

DIGITAL TOURISM THINK TANK

"The resurgence of long-haul travel globally is a key opportunity for destinations to seize, competing to win over high-value travellers undeterred by a challenging economic climate."

Nick Hall
CEO of Digital Tourism Think Tank

CAPA CENTRE FOR AVIATION

"Skyscanner's important Horizons report once again reaffirms the industry results CAPA has seen within the Aviation industry."

Marco Navarria
Global Content & Marketing Director at CAPA

Chapter 1

BOOKING WINDOWS

EMEA travellers are planning ahead for summer

Travellers across the region are getting ready for their summer holidays by booking flights two to three months in advance.

Domestic

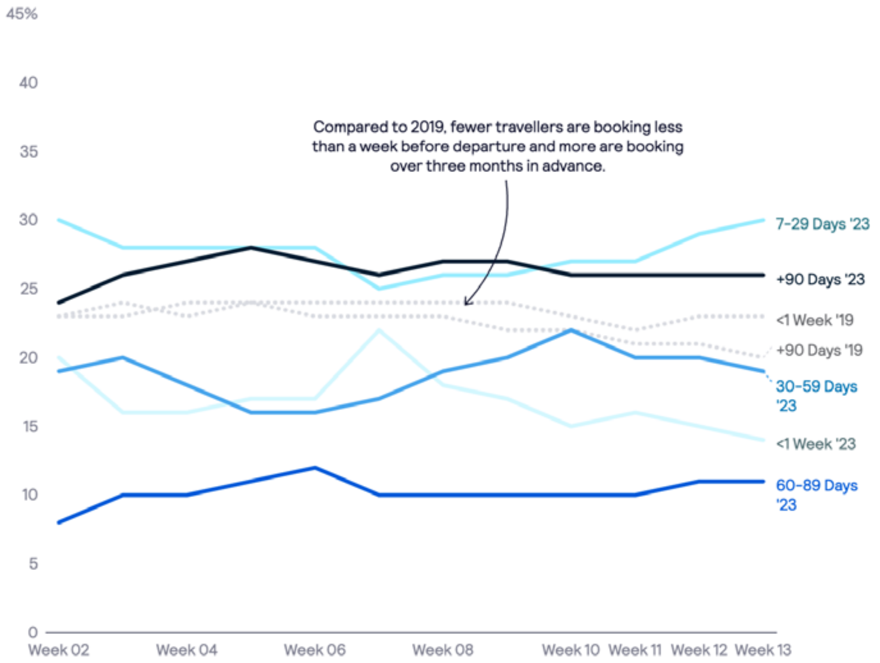
During Q1 2023, domestic travel in countries across the region was primarily booked in the 7-29 day window – gaining share from the end of March.

The shortest booking horizon – less than a week – declined during Q1 by 26%, as fewer travellers booked last-minute trips.

The biggest growth was 60-89 days, increasing by 50%, as people planned for summer and booked their flights further ahead in time.

EMEA domestic

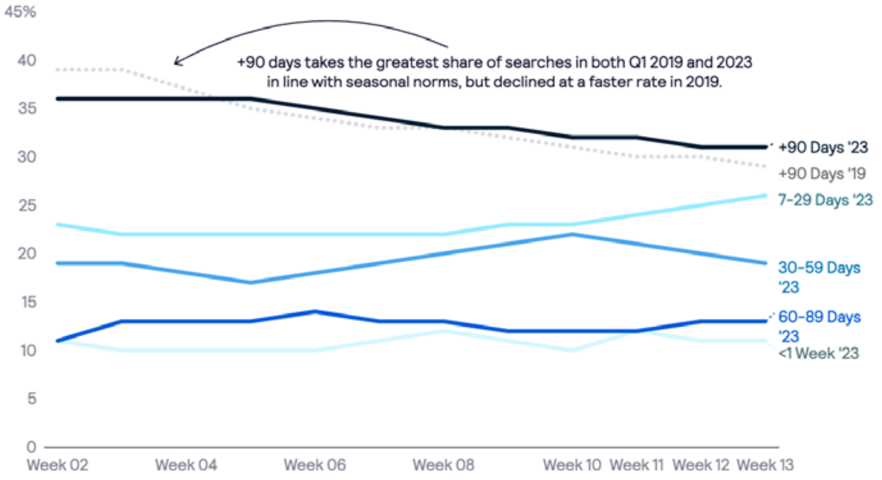
% of searches for booking window segments in Q1 2023, with selected comparisons to Q1 2019



Travellers in EMEA like to book their summer holidays at least two months in advance.

EMEA short haul

% of searches for booking window segments in Q1 2023, with selected comparisons to Q1 2019



Short haul

60-89 days also grew the most (25%) for short-haul holidays, while the 7-29 day window increased over the quarter too, by 15%.

Windows of +90 days declined by 15% as some travellers favoured booking closer to their departure dates.

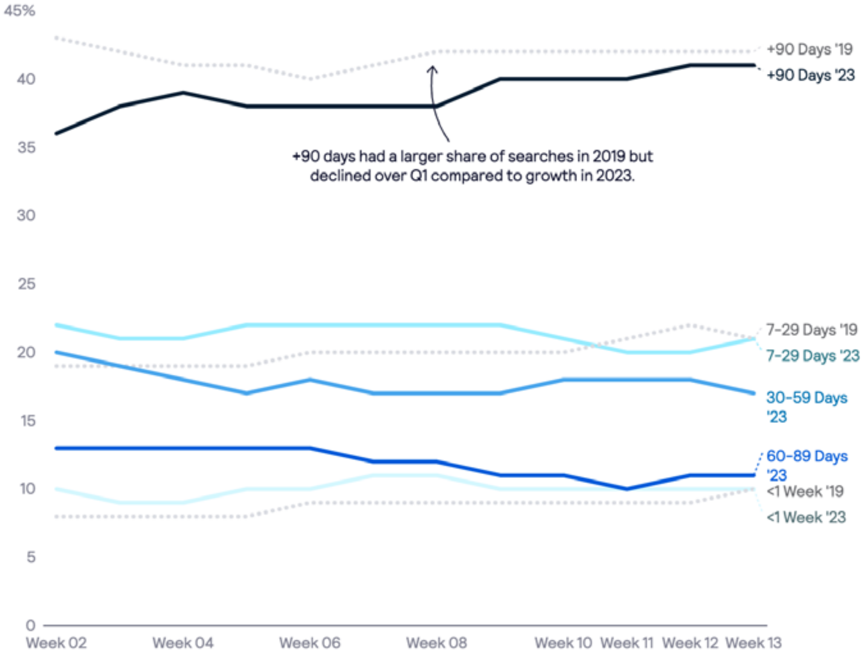
At the end of Q1, however, +90 days is still the highest share, at 31%, as travellers book summer holidays at least two months in advance.

Long haul

Booking windows of +90 days increased by 11% over Q1 to reach a 40% share. It's a sign travellers are now much more confident to book long-haul travel further ahead in time – especially to destinations in Asia-Pacific after the uncertainty during Covid.

EMEA long haul

% of searches for booking window segments in Q1 2023, with selected comparisons to Q1 2019



AMER travellers are booking further in advance

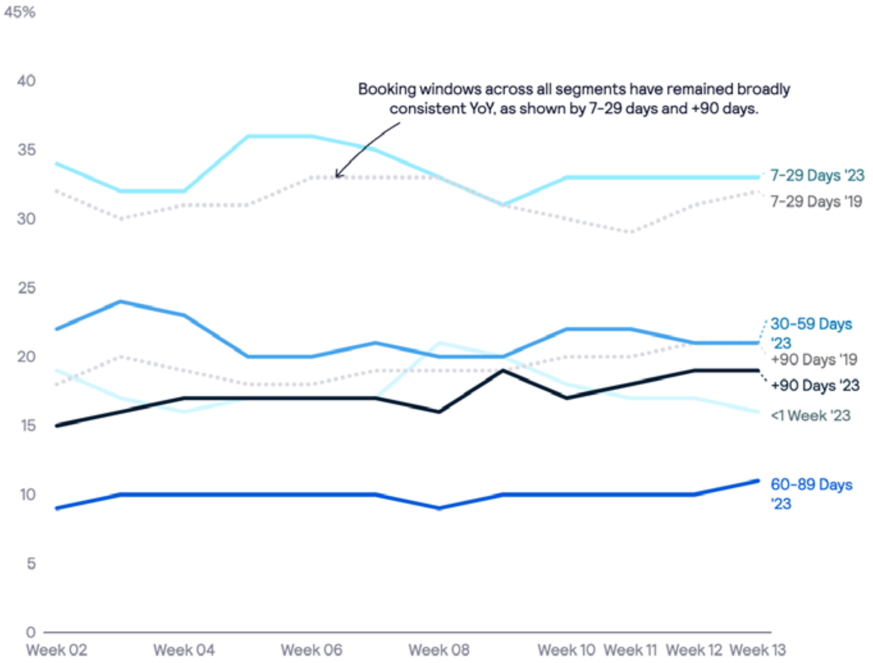
There's growth in the longest booking windows as travellers plan their domestic and short-haul trips at least two months out.

Domestic

In Q1, all booking windows of less than 60 days fell. Growth came in the segments of 60-89 days (+14%) and +90 days (26%), as travellers booked further ahead.

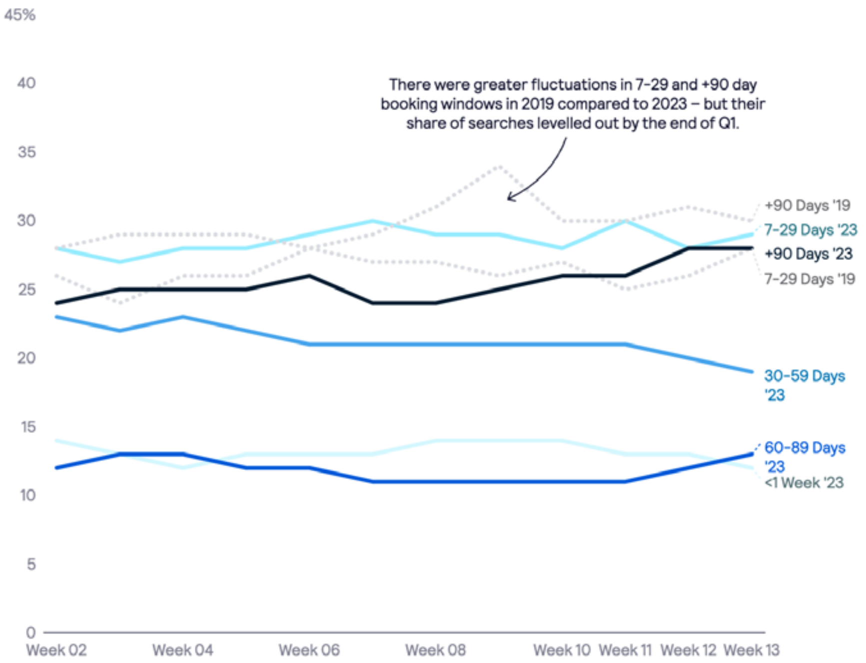
AMER domestic

% of searches for booking window segments in Q1 2023, with selected comparisons to Q1 2019



AMER short haul

% of searches for booking window segments in Q1 2023, with selected comparisons to Q1 2019



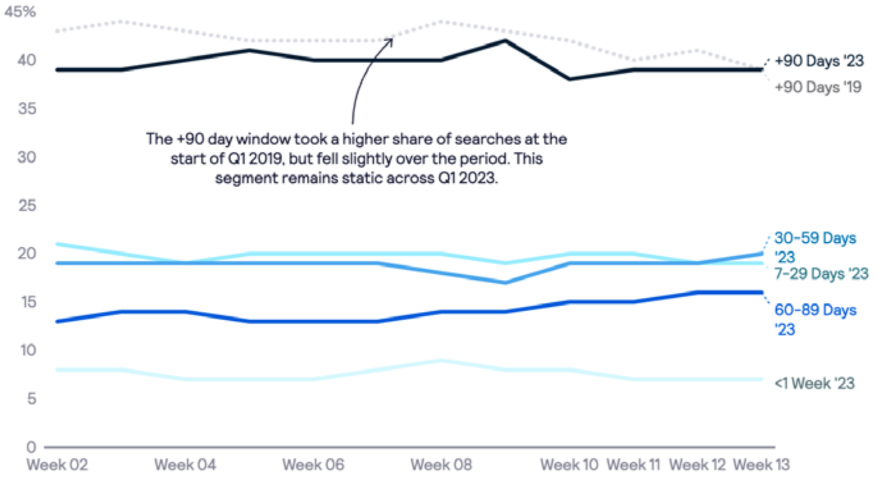
Short haul

It's a similar story for short-haul travel. There were declines of -20% for windows of less than a week and -15% for 30-59 days. At the same time, 60-89 days and +90 days grew by +12% and +17%, as more travellers booked short-haul trips further in advance compared to earlier in the year.

Almost 40% of long-haul flights were booked over 90 days before departure.

AMER long haul

% of searches for booking window segments in Q1 2023, with selected comparisons to Q1 2019



Long haul

The highest growth was 60-89 days, which rose by nearly a fifth (+19%). Despite marginal growth for the +90 days segment, its share remained the largest at 39%.

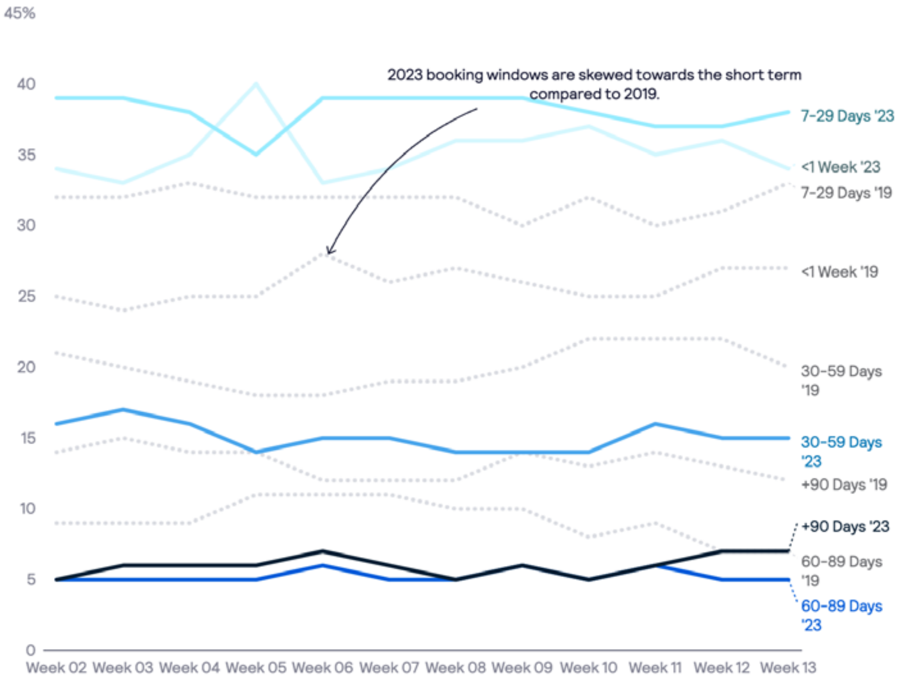
This shows a continued preference (and continued confidence) in booking bigger, usually more expensive trips at least three months ahead, likely to places that have recently opened up in Asia-Pacific.

APAC travellers are booking both last minute and long term

After the region's more recent lifting of restrictions, travellers are booking their flights a few days out and also much further in advance.

APAC domestic

% of searches for booking window segments in Q1 2023, with selected comparisons to Q1 2019



Travellers in APAC are overwhelmingly booking domestic flights within a month of departure.

Domestic

Booking horizons remained fairly static across Q1. At the end of March, segments of less than one week and 7-29 days represented three quarters of the total share. Short booking windows are clearly favoured by people looking to travel domestically.

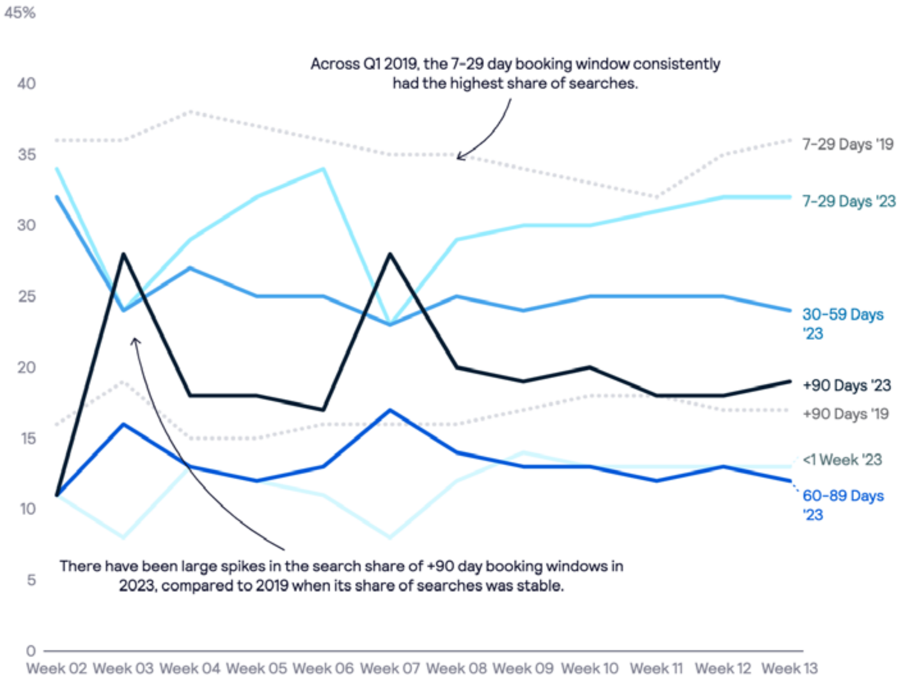
Short haul

The biggest growth was in +90 days, at 55%, followed by less than a week, at 22%. We're seeing that after restrictions have lifted, people are booking both last minute and much further ahead in time.

Mid-length booking windows of 30-59 days declined the most, by -22%. But, alongside 7-29 days, these two segments comprise nearly two-thirds of the total for short-haul searches at the end of Q1.

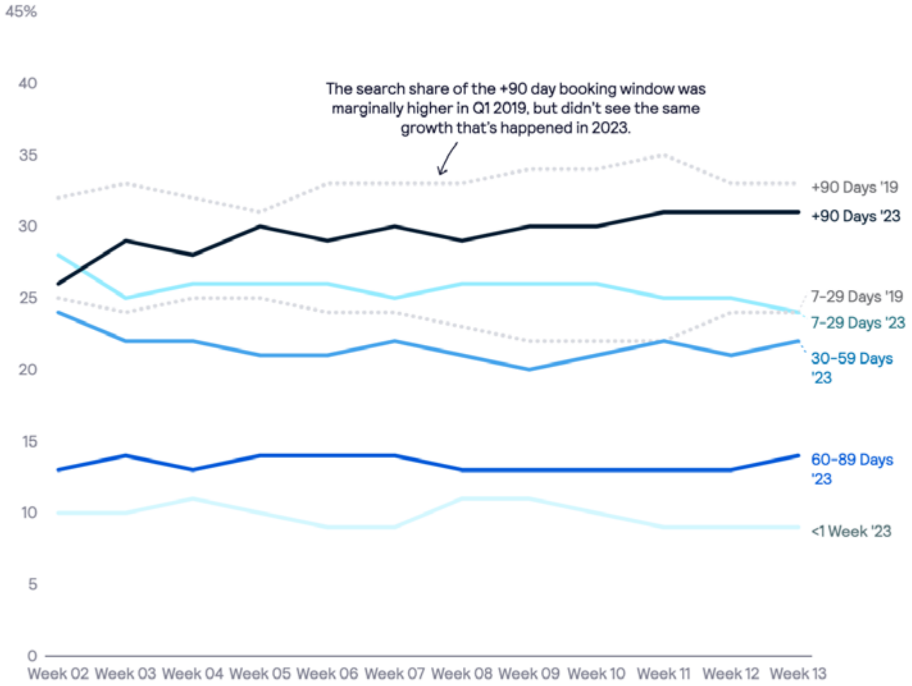
APAC short haul

% of searches for booking window segments in Q1 2023, with selected comparisons to Q1 2019



APAC long haul

% of searches for booking window segments in Q1 2023, with selected comparisons to Q1 2019



Long haul

The booking windows with the biggest increases are +90 days (+22%) and 60-89 days (+10%), as confidence grows in travelling further away and booking further out.

Chapter 2

TRENDING DESTINATIONS

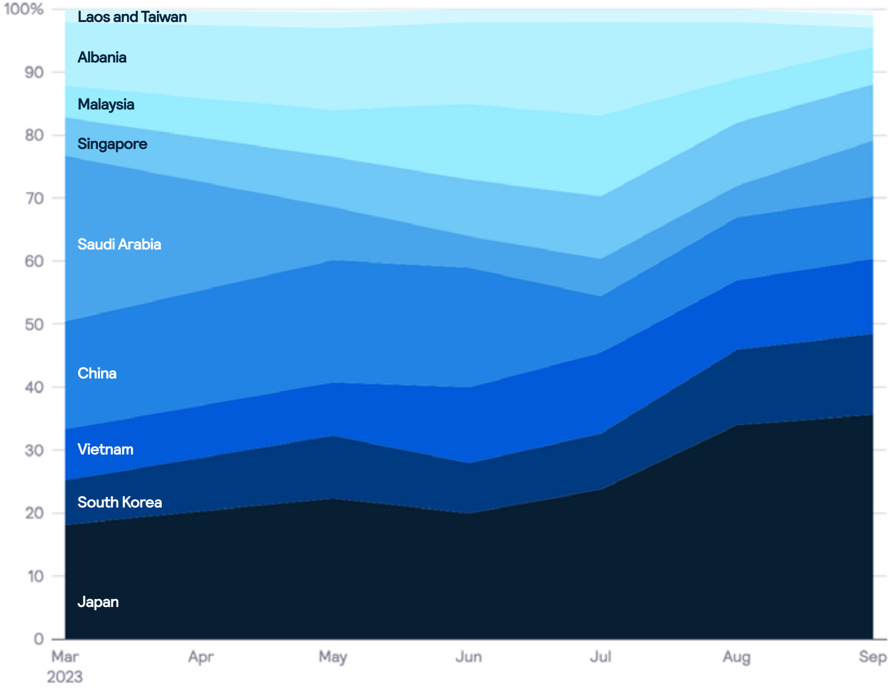
Top trending destinations for travellers from EMEA

The countries with the biggest YoY increase in Q1 searches for travel in the next six months, compared to the same period in 2022, are:

1. **Taiwan** +791%
2. **Japan** +433%
3. **Laos** +367%
4. **China** +359%
5. **Saudi Arabia** +264%
6. **Malaysia** +259%
7. **Albania** +254%
8. **Singapore** +245%
9. **South Korea** +215%
10. **Vietnam** +201%

EMEA – trending destinations

% share of searches for travel to Q1's trending destinations in Q2-3 2023



EMEA travellers look east to Asia

Travellers in EMEA are taking advantage of recent border re-openings and the relaxation of restrictions across Asia, with the continent boasting eight of the world's top 10 trending destinations. The two nations outside Asia with the biggest increase in searches from last year during Q1 are Saudi Arabia and Albania – the latter an increasingly popular European hidden gem.

Travel demand to Saudi Arabia peaks in the short term due to Eid al-Fitr in April, then falls in popularity from May before picking up again in September after the hot summer months.

Despite Taiwan topping the list by some way, its relative share of searches is small. Japan takes the largest share, followed by South Korea then Vietnam - all three countries benefitting from improved non-stop services and air connections.

China and Albania are at their most popular until June and July, respectively, then start to decline. The popularity of China, Malaysia, Taiwan and Singapore have been boosted by the resumption of direct flights.

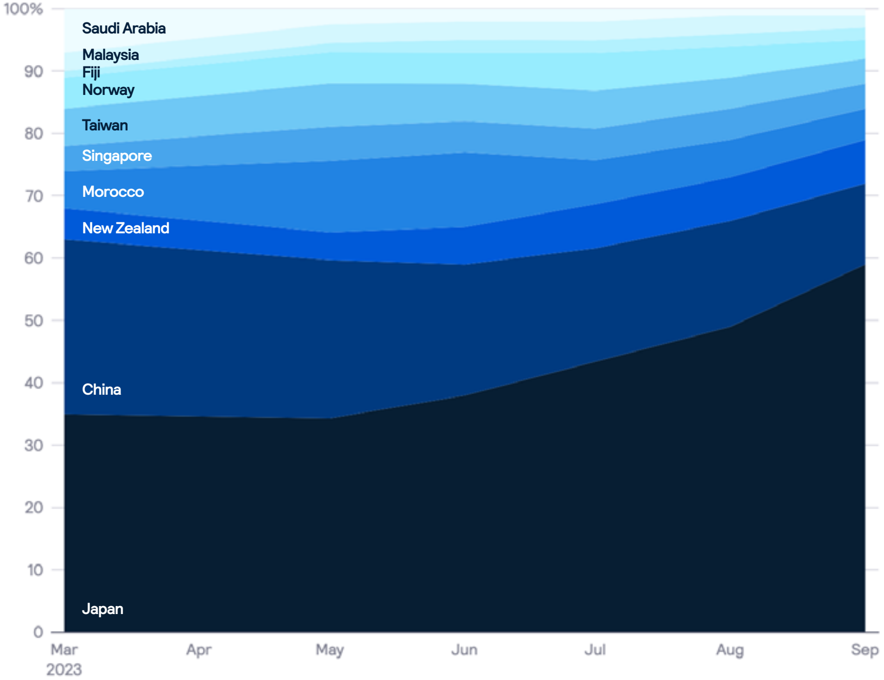
Top trending destinations for travellers from AMER

The countries with the biggest YoY increase in Q1 searches for travel in the next six months, compared to the same period in 2022, are:

1. **China** +317%
2. **Japan** +266%
3. **Taiwan** +215%
4. **Singapore** +172%
5. **Malaysia** +169%
6. **New Zealand** +136%
7. **Norway** +127%
8. **Morocco** +125%
9. **Saudi Arabia** +124%
10. **Fiji** +118%

AMER- trending destinations

% share of searches for travel to Q1's trending destinations in Q2-3 2023



AMER travellers also choose Asia-Pacific

While Europe remains one of the most popular regions for AMER travellers, there's strong desire to return to destinations in the East, with APAC taking up seven of the top 10 trending spots and Asian countries holding all top five spots.

When looking at searches by departure date, both China and Saudi Arabia start to decline in popularity for travel between May and June (the former after this April's Eid al-Fitr celebrations).

Interest in visiting Morocco and Norway grows between May and July. Both countries are benefitting from more demand in transatlantic flights into Europe from markets like North America.

Japan,again, takes the largest share of searches and is especially popular from July onwards.

Other APAC destinations including Taiwan, Singapore, Malaysia and New Zealand remain consistently popular over time.

Bucket list destinations like New Zealand and Fiji, which rely heavily on aviation connectivity, are seeing new routes added from across the region.

Top trending destinations for travellers from APAC

The countries with the biggest YoY increase in Q1 searches for travel in the next six months, compared to the same period in 2022, are:

1. **Taiwan** +1426%
2. **Laos** +895%
3. **Japan** +800%
4. **Everywhere** +701%
5. **Mongolia** +679%
6. **China** +618%
7. **Thailand** +580%
8. **Vietnam** +545%
9. **Austria** +469%
10. **Hungary** +462%

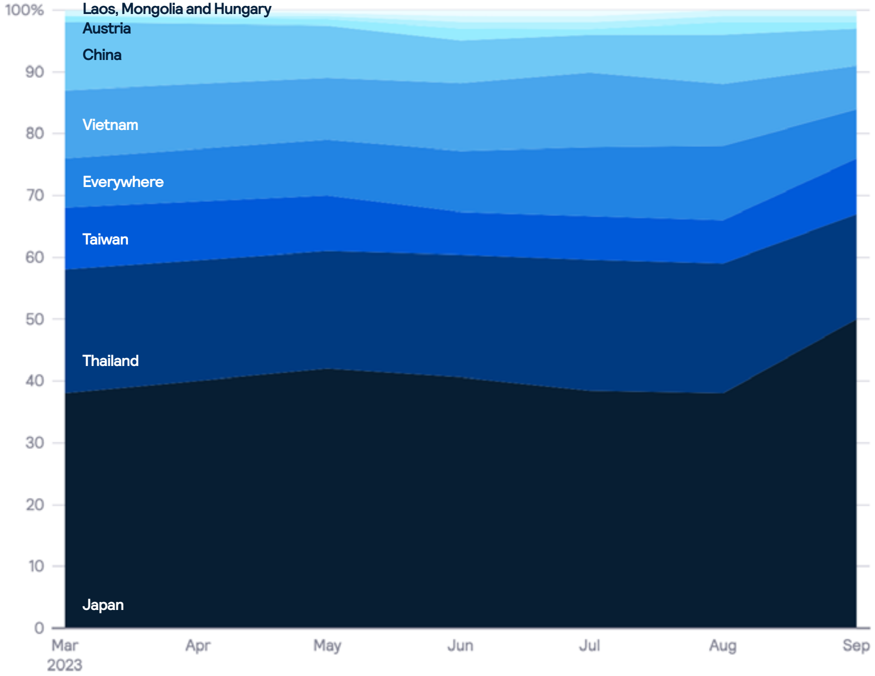
APAC travellers want to explore their region

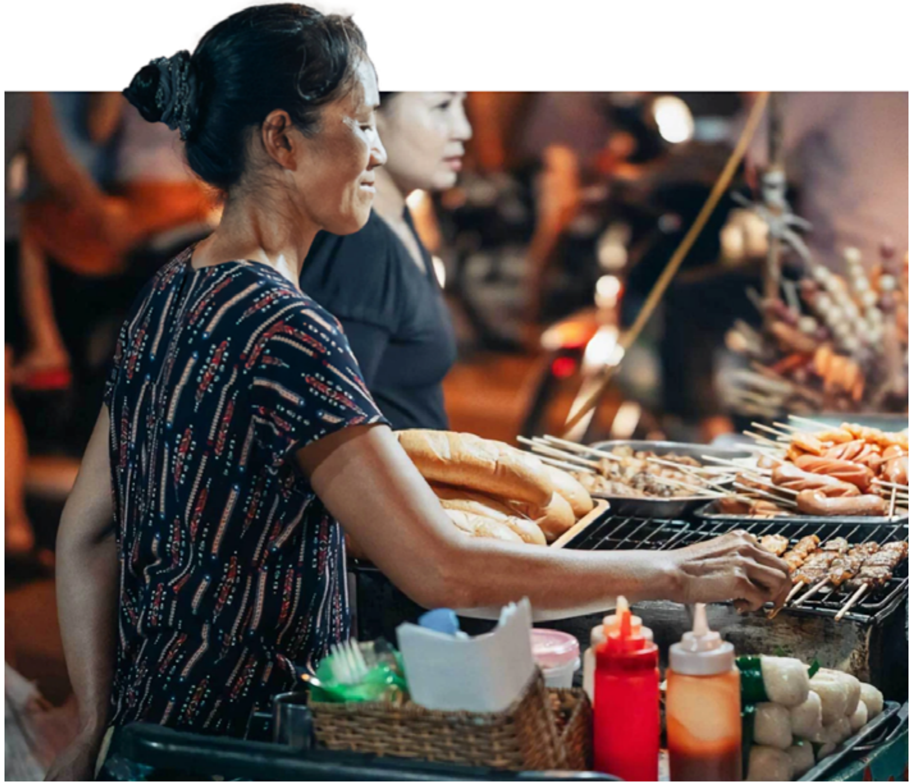
Seven out of the top 10 trending destinations for APAC travellers are within APAC itself, pointing to improved air connections following the easing of restrictions. Taiwan, Laos and Japan are seeing the biggest year-on-year growth, with Laos in particular enjoying the revival and introduction of new routes from international and regional airlines.

Destinations not within APAC include 'Everywhere', Skyscanner's popular search feature that gives travellers inspiration on when and where to travel, as well as Austria and Hungary – most likely due to recent increases in non-stop flights to Europe.

APAC – trending destinations

% share of searches for travel to Q1's trending destinations in Q2-3 2023





Looking at searches by departure date, both China and Taiwan decline in popularity between May and July, before seeing upticks in August and September.

And while destinations such as Laos and Mongolia feature in the top 10 – due to a combination of relaxed restrictions, improved air connections and a desire from travellers to get off the beaten track – their overall search volumes are relatively small. Japan and Thailand alone make up 50% of searches. Between May and August, Thailand increases in popularity, while Japan surges from August.

Report methodology: analysis of Skyscanner Travel Insight search and redirect data, based on Q1 2023 activity for travel in Q2 and Q3 2023 with selected comparisons to the equivalent pre-pandemic period (2019). Year-on-year comparisons for trending destinations are based on the same 2023 parameters and the equivalent search and travel period in 2022. Analysis conducted between 10-16th April 2023.

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