Wave
01

Global Survey

2022

INSIDE:

TRAVEL LIFESTYLE NETWORK

thrive

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METHODOLOGY

Travel think tank Thrive is unique in its commitment to solid market intelligence data. As such, Thrive works consistently with global research firm AudienceNet, and their global tracking partner GWI *(Global Web Index)*, to provide up-to-the minute data on consumers of travel around the world.

These data points are collected in two distinct, and wholly complementary ways:

1. QUANTITATIVE TRACKER

Each quarter, nationally representative research is conducted by GWI across key markets, via online surveys. While sample sizes differ within countries, strict quota sampling ensures that each survey is statistically and demographically representative of each respective country's online population, between the ages of 16-64 years. Rigid data verification and professionally accredited panel provision ensures that the margin of error in the total data for each country is no more than +/-3%.

As of Q1 2022, the GWI quarterly tracker is inclusive of 48 countries, with a total quarterly sample size of 244,000 unique respondents.

AudienceNet conducts rigorous anlayses of these data, keeping think tank, Thrive, fully informed in global shifts and trends in travel consumption. The travel experts Thrive use these analyses to shape conversation and contextualise market intelligence for the wider industry. Thrive continually identifies the core questions which need to be answered.

The TLN tracker comprises data from the 28 markets covered by its local agencies. In Q1 2022 this amounted to a sample size of 179,446.

In addition to the core tracker survey data, which forms the basis for the majority of this report, reference is also made, where relevant, to three other nationally representative, ad hoc, studies, conducted by GWI at different stages in the pandemic. One, conducted in Q2 2020, was solely concerned with US and UK. Another, conducted in Q3 2021, focussed on six specific markets, namely, Brazil, China, India, Italy, UK and USA. A third, conducted in Q1 2022, focussed on four European markets, the France, Germany, Spain and the UK.

Working with historic tracking data we have also been able to contextualise the Q1 2022 data presented here, with data from Q4 2019 (i.e., the picture immediately preceding the global pandemic) as well as with Q1 2020 and Q1 2021 data.

Please note that in certain parts of the report, totals may add up to 99% or 101% due to rounding.

2. QUALITATIVE CONVERSATION

An entirely unique offering from think tank Thrive is the establishment, early in 2022, of an on-going dialogue with travellers across all 28 markets. With professional moderation from travel experts at Thrive, TLN is following a 24/7 conversation with people travelling, and intending to travel, around the world. The key themes to have emerged in 2022, so far, are detailed in the final section of the present report, while individual verbatim comments appear throughout the report to illustrate and support the quantitative findings from the tracker.

The conversation continues.

BREAKDOWN OF Q1 2022 SAMPLE BY REGION AND EACH OF THE 28 TLN MARKETS

Total Sample - 179,446

Asia Pacific	58,567	Middle East and Africa	7,098
Europe	69,840	North America	32,886
Latin America	11,055		

Argentina	1,841	Italy	10,501
Australia	8,081	Netherlands	2,631
Austria	2,099	New Zealand	1,976
Belgium	2,103	Portugal	2,354
Brazil	9,214	Saudi Arabia	1,827
Canada	6,561	Singapore	3,545
China	25,261	South Africa	1,846
Denmark	1,579	South Korea	2,367
France	10,887	Spain	10,716
Germany	10,885	Sweden	2,606
Hong Kong	2,070	Switzerland	1,513
India	15,267	UAE	1,847
Ireland	1,462	UK	10,504
Israel	1,578	USA	26,325

TRAVEL LIFESTYLE NETWORK

Analysing the Data Showing the State of Travel Today

The leading PR consultancy group, *Travel Lifestyle Network (TLN)*, together with think tank *Thrive* and *AudienceNet*, has established a continual tracking survey to assess the state of travel and tourism worldwide.

After a turbulent two years, the first edition of the survey highlights both obstacles and opportunities.

Travel is no less desirable now than it has ever been, with a strong interest and appetite for the experiences that travel provides, but the industry will have to contend with consumer concerns relating to ongoing, Covid-induced complexities and the evolving cost of living crisis.

TLN has established four themes that point towards the trends, obstacles and opportunities surrounding the industry as a whole. *Outlined in the following section, such themes comprise the global picture, providing insight into the state of travel across the 28 relevant markets considered.*

1. WANDERLUST

Wanderlust is abound with a strong desire to seize the experiences that travel offers. Appetite for and interest in travel remains high in the post-Covid climate. During the pandemic, people longed for new experiences, culinary adventures and change of scenery. With global stress levels high and families separated, there was also a strong desire to reunite with loved ones and relax.

Personal interest in travel - high across the globe:

Latin America
57%

Europe
54%

Middle East and Africa
53%

North America
49%

Asia-Pacific
42%

Describing self as 'someone who likes to explore the world':

Middle East and Africa
60%

North America
51%

Europe
49%

Asia-Pacific
44%

Latin America
43%

Now with travel restrictions lifted, almost one-quarter of all adults, living within the 28 countries covered by our tracker, are planning domestic vacations while 13% have plans to travel internationally.

The desire for relaxation, cultural and once-in-a-lifetime experiences are acting as key influences on destination choice.

Vacation purchasing plans for 2022:

Planning to purchase an international vacation
13%

Planning to purchase a domestic vacation
24%

Planning to purchase travel tickets (e.g., a flight)
18%

Almost half of all adults (46%), surveyed across our 28 markets, are currently citing travel as being one of their personal interests. The same proportion (46%) describe themselves as being 'someone who likes to explore the world'.

A survey conducted by GWI* in the US and UK in Q2 2020 (i.e. during the pandemic) identified the following five aspects re travel and vacations that the public were most looking forward to:

What's Been Missed Most (US & UK):

1. Exploring new places	40%
2. The change of scenery	37%
3. Spending time with loved ones	32%
4. Relaxing / sunbathing	25%
5. Eating different foods	23%

** see methodology p. 2-3*

Across all 28 markets, the respondents were asked which factors tended to influence their decision with regard to where they travelled on vacation. Value for money emerged as the number 1 consideration.

A further survey conducted by GWI* in six key markets (Brazil, China, India, Italy, UK and USA) in Q3 2021 - i.e., as lockdown restrictions were lifting, examined consumer attitudes and behaviours towards travel plans for 2022. At this time, just under 40% were at least exploring their options.

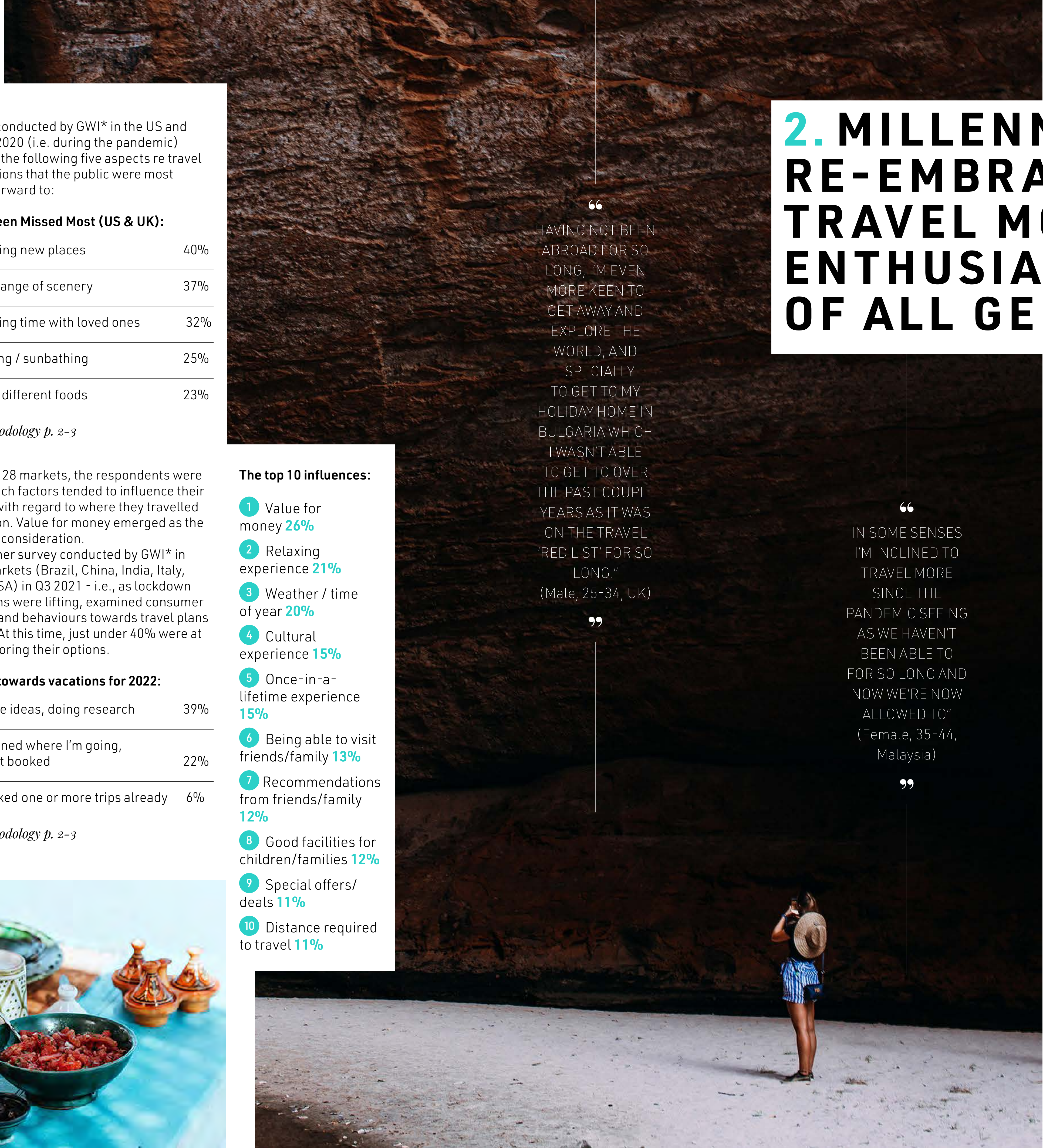
Feelings towards vacations for 2022:

Have some ideas, doing research	39%
Have planned where I'm going, but not yet booked	22%
Have booked one or more trips already	6%

** see methodology p. 2-3*

The top 10 influences:

1. Value for money **26%**
2. Relaxing experience **21%**
3. Weather / time of year **20%**
4. Cultural experience **15%**
5. Once-in-a-lifetime experience **15%**
6. Being able to visit friends/family **13%**
7. Recommendations from friends/family **12%**
8. Good facilities for children/families **12%**
9. Special offers/ deals **11%**
10. Distance required to travel **11%**



"HAVING NOT BEEN ABROAD FOR SO LONG, I'M EVEN MORE KEEN TO GET AWAY AND EXPLORE THE WORLD, AND ESPECIALLY TO GET TO MY HOLIDAY HOME IN BULGARIA WHICH I WASN'T ABLE TO GET TO OVER THE PAST COUPLE YEARS AS IT WAS ON THE TRAVEL 'RED LIST' FOR SO LONG."
(Male, 25-34, UK)"

"IN SOME SENSES I'M INCLINED TO TRAVEL MORE SINCE THE PANDEMIC SEEING AS WE HAVEN'T BEEN ABLE TO FOR SO LONG AND NOW WE'RE NOW ALLOWED TO"
(Female, 35-44, Malaysia)"

2. MILLENNIALS ARE RE-EMBRACING TRAVEL MOST ENTHUSIASTICALLY OF ALL GENERATIONS

Exploring demographics, TLN has established generational trends relating to vacation purchasing. Before the pandemic, this was relatively equal across Millennials, Gen X and Baby Boomers.

Fast forward to 2022 and recovery is more evident among both Millennials and Baby Boomers when compared with Gen X. Baby Boomers are showing the greatest appetite to resume international travel whereas domestic travel intentions are most pronounced among Millennials.

Purchased a vacation abroad in the last 3 to 6 months:

	Q4 2019	**Q1 2022**
Gen Z	14%	11%
Millennials	18%	12%
Gen X	18%	9%
Baby Boomers	21%	19%

Purchased a domestic vacation in the last 3 to 6 months:

	Q4 2019	**Q1 2022**
Gen Z	27%	22%
Millennials	33%	28%
Gen X	33%	24%
Baby Boomers	33%	21%

3. COVID IMPACTED TRAVEL WORLDWIDE, BUT CONSUMERS ARE DETERMINED TO NAVIGATE THE NEW COMPLEXITIES

The purchase of vacations, along with bookings of hotels, rented accommodation and car hire all point towards the impact of the pandemic worldwide. Though the impact of Covid continues to be evident in our Q1 2022 data, this is reflective of the previous period in which lockdowns restrictions were more widespread. It will be of great interest to examine the upward trends in successive quarterly waves of our global tracker.

Should we say quarterly here when the results would have been every 6 months?

Some green shoots from our ongoing qualitative conversation with consumers across all markets reveal that, while flight cancellations and delays, as well as added, and sometimes unpredictable, protocols, are sources of anxiety for today's travellers, many are determined to resume pre-pandemic travel habits and are finding ways to navigate post-Covid travel realities.

"There is a lot of paperwork that you need to fill out and I was worried about being stopped at the boarding gate because I hadn't answered a question correctly. This was an extra layer of anxiety for me. I live in Australia and am visiting my small grandchildren in London so being able to travel again is important to me." (Female, 65+, Australia)

"Unfortunately, the pandemic has made travel more expensive and less comfortable, but my desire to travel remains intact." (Female, 45-54, Spain)

Our tracker (see methodology p 4 - 5) enables us to look back historically. The data which follows sets out the position immediately before the global pandemic – i.e. Q4 2019 and then draws comparisons from Q1 2020, Q1 2021 and Q1 2022.

The proportion that had purchased a vacation abroad in the last 3 - 6 months:

2019	17%
2020	17%
2021	11%
2022	11%

The proportion that had purchased a domestic vacation in the last 3 - 6 months:

2019	32%
2020	29%
2021	23%
2022	24%

The proportion that hire a rental car once a year or more:

2019	47%
2020	46%
2021	44%
2022	41%

The proportion that stay in a hotel once a year or more:

2019	66%
2020	65%
2021	61%
2022	58%

The proportion that stay in rented accommodation (e.g. Airbnb) stays once a year or more:

2019	50%
2020	49%
2021	48%
2022	47%

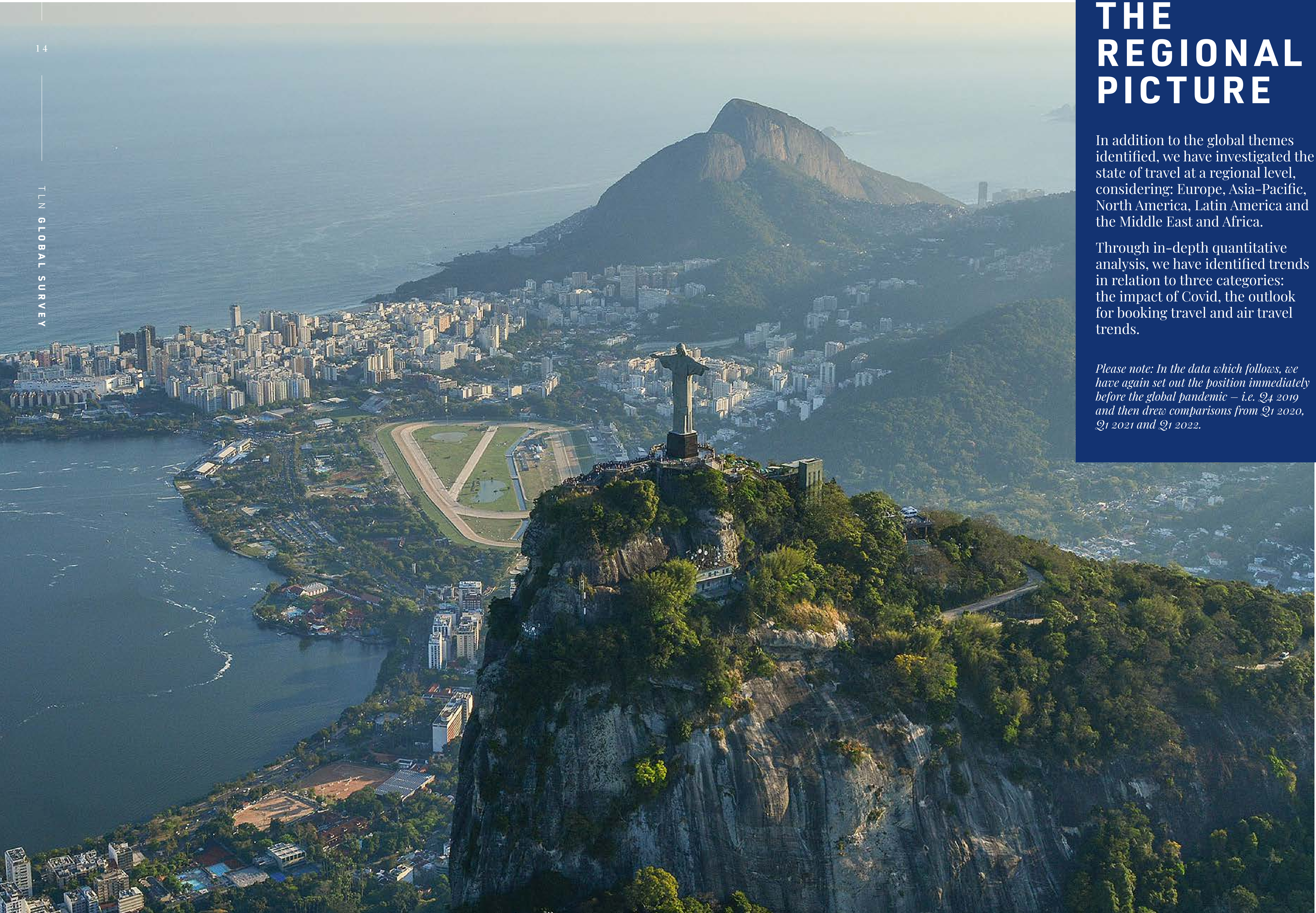
"I'M FLYING A LOT AT THE MOMENT AND CAN'T AFFORD TO PAY FOR THE BETTER FLIGHT TIMES DURING THE DAY EVERY TIME I FLY, SO I OFTEN CHOOSE FLIGHTS SCHEDULED TO LAND AROUND 9 AT NIGHT AT MY DESTINATION AS THESE ARE CHEAPER. HOWEVER, WITH THE CONSTANT DELAYS AT THE MOMENT, WHENEVER MY FLIGHT IS DELAYED AT NIGHT, IT MEANS THAT I MISS THE LAST TRAIN AT MY DESTINATION AND END UP HAVING TO TAKE TAXIS COSTING A BOMB FROM THE AIRPORT TO GET TO WHERE I'M STAYING"
(Female, 25-34, UK)

4. VALUE FOR MONEY IS LIKELY TO BECOME A KEY FACTOR IN TRAVEL-RELATED DECISION MAKING

In the context of the evolving cost-of-living crisis, the travel industry must also contend with consumer concerns relating to the price of travel. With value for money the factor that has the most impact on decisions about where to travel on vacation for just over a quarter (26%), affordability is likely to have a significant impact on travel-related purchasing in the second half of 2022 and into 2023. Furthermore, as qualitative conversations demonstrate, some travellers are already opting for the cheapest airlines.

26%

selected value for money as the leading factor shaping decisions about where to travel for vacations.



THE REGIONAL PICTURE

In addition to the global themes identified, we have investigated the state of travel at a regional level, considering: Europe, Asia-Pacific, North America, Latin America and the Middle East and Africa.

Through in-depth quantitative analysis, we have identified trends in relation to three categories: the impact of Covid, the outlook for booking travel and air travel trends.

Please note: In the data which follows, we have again set out the position immediately before the global pandemic – i.e. Q4 2019 and then drew comparisons from Q1 2020, Q1 2021 and Q1 2022.

EUROPE

THE IMPACT OF COVID

The impact of the pandemic on the travel industry was more acute in Europe than any other global region, with a 21% decline in the proportion purchasing vacations abroad between 2019 and 2021.

The proportion that had purchased a vacation abroad in the last 3 - 6 months:

2019	31%
2020	31%
2021	12%
2022	17%

The proportion that had purchased a domestic vacation in the last 3 - 6 months:

2019	31%
2020	29%
2021	21%
2022	26%

The proportion that hire a rental car once a year or more:

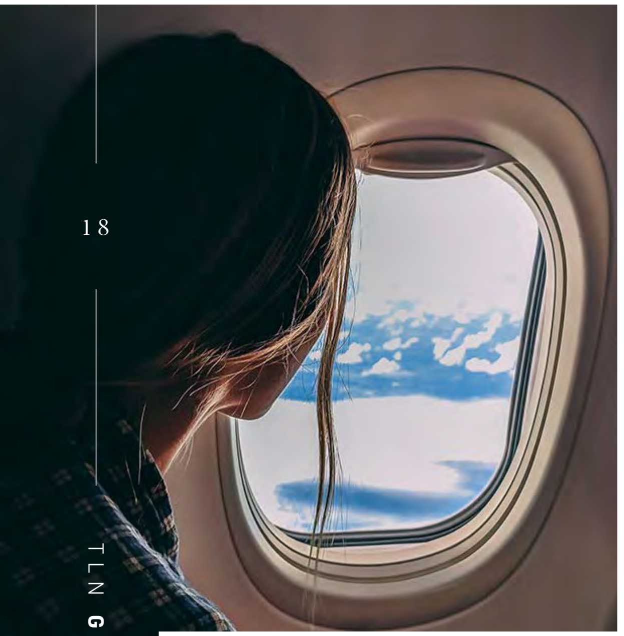
2019	25%
2020	26%
2021	22%
2022	22%

The proportion that stay in a hotel once a year or more:

2019	62%
2020	63%
2021	53%
2022	54%

The proportion that stay in rented accommodation (e.g. Airbnb) once a year or more:

2019	37%
2020	38%
2021	35%
2022	37%



AIR TRAVEL TRENDS

Low-cost airlines are popular amongst leisure fliers, with one third (33%) of consumers considering Ryanair, making it the top choice. This may well be increasingly the case due to recent increases in the cost of living.

Thrive's ongoing conversation with travellers tends to reflect this:

"Due to rising fuel prices and the economic impact of covid, unfortunately it's become a case of booking with the cheapest airline." (Male, 25-34, UK)

Business travellers do not favour low-cost airlines as strongly. None of the top four choices are low-cost carriers and Ryanair drops down to the fifth most popular choice. The proportion purchasing travel tickets (e.g flights) has declined by 12% since 2019. However, with a 5% increase between 2021 and 2022, an upwards trend is emerging. The story is similar for the proportion planning to purchase with a recovery of 4% since 2021.

Top 5 airlines that consumers would consider for leisure flights:

1. Ryanair	33%
2. Lufthansa	32%
3. EasyJet	29%
4. Air France	28%
5. British Airways	27%

Top 5 airlines that consumers would consider for business flights:

1. Lufthansa	10%
2. Air France	9%
3. British Airways	9%
4. Emirates	8%
5. Ryanair	7%

The proportion flying business or first class once a year or more:

2019	2020	2021	2022
19%	19%	16%	17%

The proportion that had purchased travel tickets (e.g a flight) in the last 3-6 months:

2019	2020	2021	2022
29%	28%	12%	17%

The proportion planning to purchase travel tickets (e.g. a flight):

2019	2020	2021	2022
24%	23%	14%	18%

THE OUTLOOK

Europe appears to be recovering faster than other regions with regards to foreign travel, with nearly one quarter (23%) planning to purchase an international vacation. However, across five markets, the proportion planning to purchase an international vacation is lower than the proportion planning to purchase a domestic vacation.

The proportion planning to purchase vacations in 2022 at a regional level:

Abroad
23%
Domestic
26%

The proportion planning to purchase vacations in 2022 at an individual market level:

Market	Abroad	Domestic
Austria	40%	32%
Switzerland	39%	25%
Belgium	34%	20%
Ireland	31%	24%
Denmark	31%	21%
Netherlands	30%	21%
Germany	28%	27%
UK	21%	24%
Sweden	20%	21%
Portugal	20%	29%
Italy	19%	30%
France	19%	25%
Spain	18%	32%

TOP 5 INTENDED VACATION DESTINATIONS FOR 2022 ACROSS FOUR KEY MARKETS:

A survey conducted by GWI* in Q1 2022 identified the top 5 intended vacation destinations in France, Germany, Spain and the UK. An average of 40% are intending to visit their home country for vacation, reinforcing the popularity of domestic holidays.

→ France — Top Destinations

1	**France**	**27%**
2	Spain	17%
3	Italy	14%
4	Portugal	10%
5	Greece	7%

→ Germany — Top Destinations

1	**Germany**	**34%**
2	Spain	15%
3	Italy	13%
4	Greece	10%
5	USA	10%

→ Spain — Top Destinations

1	**Spain**	**41%**
2	Portugal	17%
3	Italy	16%
4	France	16%
5	USA	11%

→ UK — Top Destinations

1	**UK**	**40%**
2	Spain	19%
3	USA	14%
4	Italy	11%
5	France	10%

* see methodology p. 2-3

ASIA PACIFIC

THE IMPACT OF COVID

Since 2019, the proportion purchasing vacations abroad has declined across the Asia-Pacific. With domestic holidays emerging as a more common travel habit across the region, due to Covid, purchasing habits in this area have been the most significantly affected. As of 2022, the region is not yet showing signs of major recovery, with key indicators such as vacation purchasing, car hire rental and hotel and rented accommodation use lower now than in 2021.

The proportion that had purchased a vacation abroad in the last 3 - 6 months:

Year	%
2019	16%
2020	15%
2021	12%
2022	11%

The proportion that had purchased a domestic vacation in the last 3 - 6 months:

Year	%
2019	33%
2020	28%
2021	25%
2022	24%

The proportion that hire a rental car once a year or more:

Year	%
2019	59%
2020	56%
2021	56%
2022	50%

The proportion that stay in a hotel once a year or more:

Year	%
2019	71%
2020	69%
2021	68%
2022	62%

The proportion that stay in rented accommodation (e.g. Airbnb) once a year or more:

Year	%
2019	59%
2020	58%
2021	57%
2022	52%

THE OUTLOOK

Though the Covid-induced decline in travel trends continues, market specific deep dives provide scope for optimism. Intentions to spend more on travel in the second half of 2022 are high in China (44%) and India (50%), and between one quarter and one third of both populations intend to book one of several popular vacation types. * Additionally, in all markets except Singapore and Hong Kong, at least one-fifth plan to purchase a domestic vacation.

* *see methodology p. 2-3*

The proportion planning to purchase vacations in 2022 at a regional level:

Abroad	Domestic
21%	26%

The proportion planning to purchase vacations in 2022 at an individual market level:

Market		
India	Abroad	15%
	Domestic	29%
Singapore	Abroad	12%
	Domestic	16%
China	Abroad	11%
	Domestic	20%
Hong Kong	Abroad	10%
	Domestic	17%
New Zealand	Abroad	10%
	Domestic	26%
Australia	Abroad	10%
	Domestic	24%
South Korea	Abroad	7%
	Domestic	26%

The vacation types that residents in China are most likely to book in 2022:

Country/rural escape	30%
Short summer break (e.g. 1 week)	27%
Long weekend (domestic)	27%
Walking/hiking trip	25%
City break	24%

The vacation types that residents in India are most likely to book in 2022:

Road trip	36%
Long weekend (domestic)	34%
Short summer break (e.g. 1 week)	32%
Country/rural escape	28%
Long summer break (e.g 2 weeks)	27%

The proportion flying business or first class once a year or more:

2019	2020	2021	2022
52%	50%	49%	46%

The proportion that had purchased travel tickets (e.g a flight) in the last 3-6 months:

2019	2020	2021	2022
24%	22%	20%	20%

The proportion planning to purchase travel tickets (e.g. a flight):

2019	2020	2021	2022
22%	23%	14%	18%

Top 5 airlines that consumers would consider for leisure flights:

1. China Eastern	15%
2. China Southern	15%
3. Air China	15%
4. Air India	14%
5. Air Asia	11%

Top 5 airlines that consumers would consider for business flights:

1. China Eastern	11%
2. Air China	11%
3. China Southern	11%
4. Air India	8%
5. Air Asia	7%

AIR TRAVEL TRENDS

Across airlines considered for both business and leisure, Chinese airlines emerge in the top-three spots. Market specific data is presented in section 3.

Overall, there has been a slight decline in the proportion purchasing travel tickets since 2019 (-4%). However, this has stabilised since 2020 and the proportion planning to purchase has begun to recover with a 4% increase since 2021.

24%

'A Relaxing Experience' is the most popular reason for booking a vacation for those living in Australia.

'A once-in-a-lifetime experience' is the key motivation behind vacations taken by 25% of those living in Hong Kong.

NORTH AMERICA

THE IMPACT OF COVID

Purchases of domestic vacations are returning to pre-pandemic levels, rising from 21% in 2021 to 24% in 2022, whereas purchases of vacations abroad have only increased from 7% to 8% in the same period. Rental car hire has remained the same at over one-third (34%) before, during and after the pandemic.

The proportion that had purchased a vacation abroad in the last 3 - 6 months:

Year	%
2019	13%
2020	12%
2021	6%
2022	8%

The proportion that had purchased a domestic vacation in the last 3 - 6 months:

Year	%
2019	29%
2020	28%
2021	19%
2022	24%

The proportion that hire a rental car once a year or more:

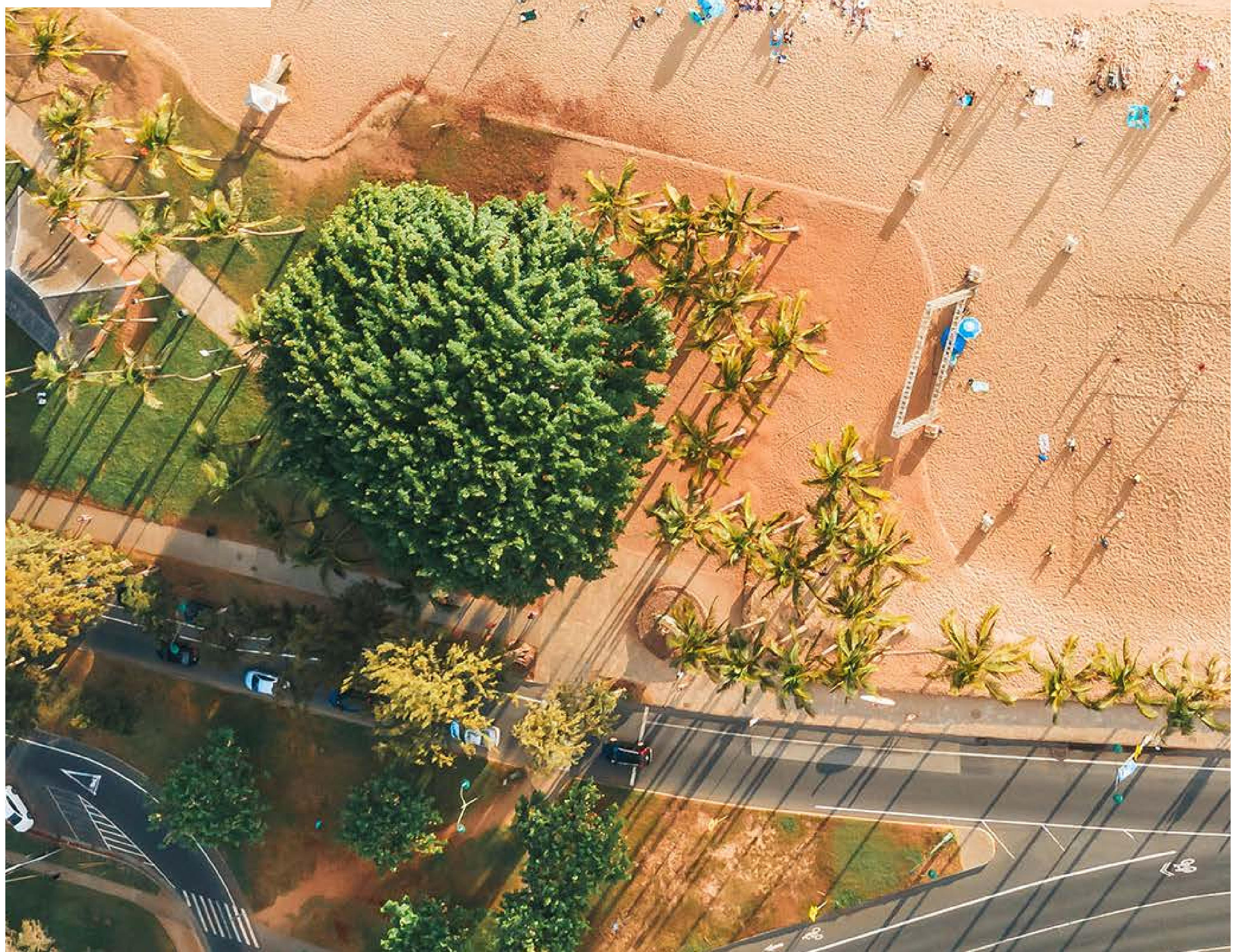
Year	%
2019	34%
2020	34%
2021	32%
2022	34%

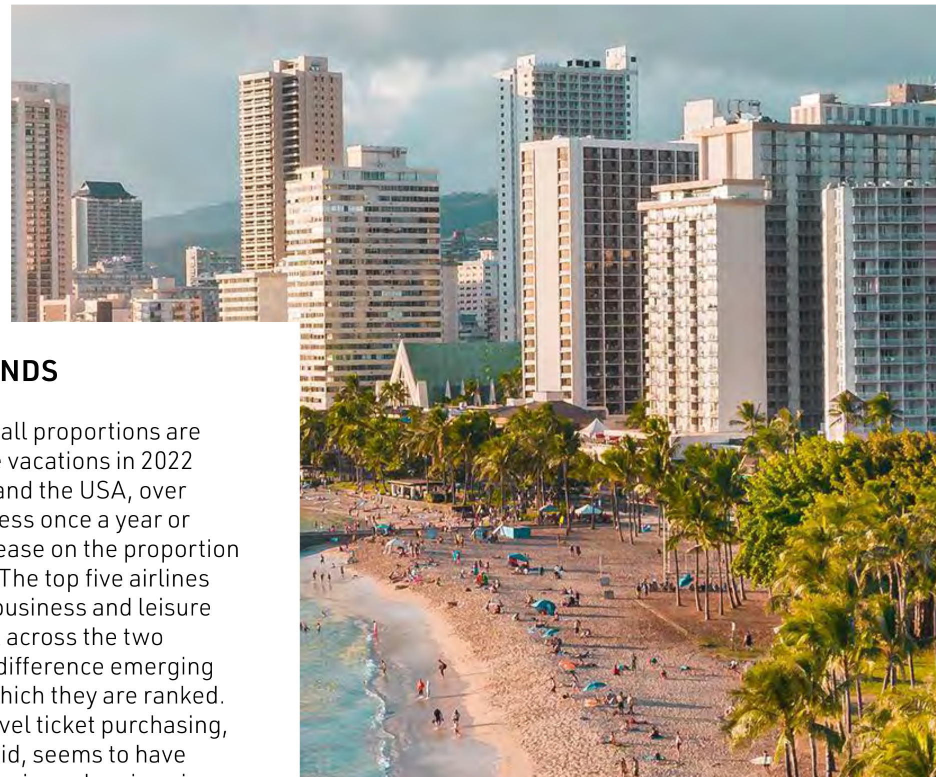
The proportion that stay in a hotel once a year or more:

Year	%
2019	64%
2020	63%
2021	56%
2022	59%

The proportion that stay in rented accommodation (e.g. Airbnb) once a year or more:

Year	%
2019	30%
2020	31%
2021	31%
2022	35%





THE OUTLOOK

In both the USA and Canada, over one fifth are planning to purchase a domestic vacation in 2022, with domestic long weekends and road-trips particularly popular in the USA (32% respectively intend to book these types of vacation). Vacations abroad are unsurprisingly less popular, given the diversity of travel experiences available to both sets of residents in their home countries.

The proportion planning to purchase vacations in 2022 at a regional level:

Abroad
10%

Domestic
25%

The proportion planning to purchase vacations in 2022 at an individual market level:

Canada		
	Abroad	14%
	Domestic	20%
USA		
	Abroad	14%
	Domestic	20%

The vacation types most likely to be booked in 2022 in the USA:

33%
Country/rural escape

33%
Road trip

32%
Long weekend (domestic)

22%
Long summer break (e.g 2 weeks)

22%
Staycation

AIR TRAVEL TRENDS

Though relatively small proportions are planning to purchase vacations in 2022 across both Canada and the USA, over one quarter fly business once a year or more, with a 4% increase on the proportion doing so since 2019. The top five airlines considered for both business and leisure flights are consistent across the two categories, with the difference emerging only in the order in which they are ranked.

The decline in travel ticket purchasing, likely induced by Covid, seems to have peaked in 2021 and is since showing signs of recovery with a +5% increase on the proportion having done in 2022.

Top 5 airlines that consumers would consider for leisure flights:

1. Delta	40%
2. American Airlines	40%
3. United Airlines	38%
4. SouthWest Airlines	32%
5. JetBlue	20%

Top 5 airlines that consumers would consider for business flights:

1. American Airlines	16%
2. Delta	15%
3. United Airlines	14%
4. SouthWest Airlines	10%
5. JetBlue	8%

The proportion flying business or first class once a year or more:

2019	2020	2021	2022
21%	22%	24%	25%

The proportion that had purchased travel tickets (e.g a flight) in the last 3-6 months:

2019	2020	2021	2022
27%	26%	16%	21%

The proportion planning to purchase travel tickets (e.g. a flight):

2019	2020	2021	2022
23%	23%	18%	20%

LATIN AMERICA

THE IMPACT OF COVID

The proportion of people in Latin America purchasing vacations abroad is still less than half of what it was before the pandemic. Domestic vacation purchases are gradually returning to pre-pandemic levels, but are still lower. Hotel stays in 2022 remain much lower than in 2019, at 36%, however the proportion of those staying in rented accommodation has returned to pre-pandemic levels.

The proportion that had purchased a vacation abroad in the last 3 - 6 months:

2019	13%
2020	11%
2021	4%
2022	6%

The proportion that had purchased a domestic vacation in the last 3 - 6 months:

2019	29%
2020	32%
2021	21%
2022	26%

The proportion that hire a rental car once a year or more:

2019	23%
2020	22%
2021	18%
2022	19%

The proportion that stay in a hotel once a year or more:

2019	44%
2020	44%
2021	32%
2022	35%

The proportion that stay in rented accommodation (e.g. Airbnb) once a year or more:

2019	30%
2020	30%
2021	26%
2022	29%

AIR TRAVEL TRENDS

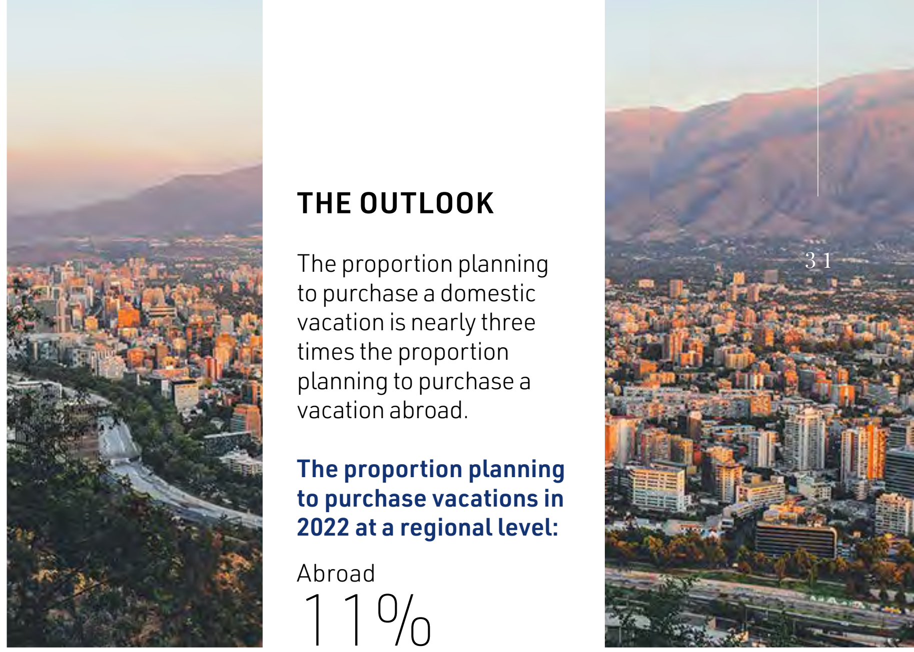
Business and leisure fliers appear to present no differences in top-airlines considered, with three Latin-American based airlines (Gol, LATAM, and Azul) leading the way, followed by American Airlines and Emirates, both of which are more global in scope. The popularity of Gol, the low-budget airline, may reflect the importance of value for money in the current climate. However, travel ticket purchasing is not yet showing major signs of recovery, with no statistically significant increases between 2021 and 2022.

Top 5 airlines that consumers would consider for leisure flights:

1. Gol	51%
2. LATAM	47%
3. Azul	44%
4. American Airlines	20%
5. Emirates	17%

Top 5 airlines that consumers would consider for business flights:

1. Gol	26%
2. LATAM	24%
3. Azul	22%
4. American Airlines	11%
5. Emirates	9%



THE OUTLOOK

The proportion planning to purchase a domestic vacation is nearly three times the proportion planning to purchase a vacation abroad.

The proportion planning to purchase vacations in 2022 at a regional level:

Abroad
11%

Domestic
30%

The proportion planning to purchase vacations in 2022 at an individual market level:

Argentina	
Abroad	13%
Domestic	24%
Brazil	
Abroad	10%
Domestic	31%

The proportion flying business or first class once a year or more:

2019	2020	2021	2022
23%	22%	18%	21%

The proportion that had purchased travel tickets (e.g a flight) in the last 3-6 months:

2019	2020	2021	2022
23%	23%	13%	15%

The proportion planning to purchase travel tickets (e.g. a flight):

2019	2020	2021	2022
23%	22%	15%	16%

The vacation types most likely to be booked in 2022 in Brazil:

Road trip	**34%**
Short summer break	**32%**
Long weekend (domestic)	**31%**
Long summer break (e.g 2 weeks)	**29%**
City break	**20%**

MIDDLE EAST & AFRICA

THE IMPACT OF COVID

The proportion of those purchasing vacations abroad remains at 8%, half the proportion in 2019. This has not increased from 2021 to 2022. Stays in rental accommodation have increased since before Covid, and stays in hotels are returning to pre-pandemic levels, increasing from 45% in 2021 to 49% in 2022.

The proportion that had purchased a vacation abroad in the last 3 - 6 months:

2019	16%
2020	15%
2021	7%
2022	8%

The proportion that had purchased a domestic vacation in the last 3 - 6 months:

2019	27%
2020	26%
2021	21%
2022	24%

The proportion that hire a rental car once a year or more:

2019	32%
2020	34%
2021	27%
2022	30%

The proportion that stay in a hotel once a year or more:

2019	51%
2020	54%
2021	44%
2022	49%

The proportion that stay in rented accommodation (e.g. Airbnb) once a year or more:

2019	41%
2020	44%
2021	40%
2022	43%

AIR TRAVEL TRENDS

Emirates and British Airways are the leading airlines considered for both leisure and business flights. Despite a small decline in the proportion flying business or first class once a year or more, over a quarter of the regional sample continue to do so.

2021 saw the depths of the decline in travel ticket purchasing, with 13% decrease in the proportion that had done so in the last 3 - 6 months, and a 7% decrease in the proportion planning to purchase. 2022 is showing signs of recovery with 5% and 3% increases in the two categories respectively.

Top 5 airlines that consumers would consider for leisure flights:

1.	Emirates	43%
2.	British Airways	24%
3.	Saudia	21%
4.	Qatar	20%
5.	Mango	20%

Top 5 airlines that consumers would consider for business flights:

1.	Emirates	24%
2.	British Airways	14%
3.	Qatar	12%
4.	Saudia	12%
5.	Etihad	9%

The proportion flying business or first class once a year or more:

2019	2020	2021	2022
30%	33%	27%	27%

The proportion that had purchased travel tickets (e.g a flight) in the last 3-6 months:

2019	2020	2021	2022
28%	23%	15%	20%

The proportion planning to purchase travel tickets (e.g. a flight):

2019	2020	2021	2022
28%	26%	21%	24%

THE OUTLOOK

At a regional level, domestic vacations are set to be more popular in 2022 than vacations abroad, with +10% planning to purchase the former relative to the latter. Market-specific data does, however, highlight nuances, with vacations abroad just as popular as domestic vacations in the UAE.

The proportion planning to purchase vacations in 2022 at a regional level:

Abroad
14%

Domestic
24%

The proportion planning to purchase vacations in 2022 at an individual market level:

Market	Abroad	Domestic
Israel	22%	26%
UAE	19%	19%
Saudi Arabia	18%	25%
South Africa	9%	25%

QUALITATIVE CONVERSATION

TRAVEL LIFESTYLE NETWORK ASSESSES VIEWS ON THE STATE OF TRAVEL TODAY

In addition to TLN's continual global tracking survey, we have launched an on-going dialogue with travellers, starting in the UK and gradually engaging travellers across all 28 markets. *The dialogue kicked off in early 2022 and already some key themes are emerging...*

With professional moderation from travel experts at *Thrive*, *TLN* is following a 24/7 conversation with people travelling, and intending to travel, around the world.

There is notable longing to resume pre-pandemic travel habits with strong desire to visit new places and return to old favourites.

"Having not been abroad for so long, I'm even more keen to get away and explore the world, and especially to get to my holiday home in Bulgaria which I wasn't able to get to over the past couple years as it was on the travel 'Red list' for so long." *(Male, 25-34, Country of Residence: UK)*

"Honestly I'm more inclined to travel since the pandemic – being stuck made us prioritize personal travel and planning it!"*(Female, 45-54, USA)*

"My feelings towards travelling stayed the same, if anything it made it more of a surreal and exciting experience during 2020." *(Male, 25-34, UAE)*

"I still love travelling and, in a way, I have a lot more of a desire to travel now than I did before, possibly because it's not so much of a given now" *(Female, 25-34, UAE)*

Many express increased stress and anxiety thanks to post-Covid complexities, with some going as far as to suggest that the hassle is creating hesitancy about international travel. Ever-changing Covid protocols, flight delays and cancellations and prolonged periods without air-travel are key factors contributing to increased stress and anxiety.

"I tend to give myself more time at the airport since the pandemic, as there is more paperwork which is stressful and long." *(Male, 25-34, Brazil)*

"I have experienced additional costs, flights being cancelled or rescheduled at short notice and staff shortages since the pandemic. A LOT of my friends are complaining about cancelled flights – which are different to delays or weather issues." *(Female, 45-54, USA)*

"The problems at airports have and do make me consider if it is worth the hassle traveling internationally." *(Male, 55-64, UK)*

"I have the ability to travel where I please and work remotely with my job and I am concerned that flight delays and/or cancellations will impact my work schedule or my general wellbeing such as hours of sleep." *(Female, 16-24, Germany)*

"Compared to before the pandemic, air travel has definitely become more stressful. It's more nerve-wracking when booking flights to destinations which require you to obtain a negative Covid test result within a few days of departure – it adds a layer of anxiety that you may not be able to get on your flight despite having paid for it." *(Female, 25-34, UK)*

"Things are getting worse, tickets are getting pricier, there is a shortage of flight attendants and air staff... airports are a mess. It's really not looking good. I really hope all these factors can improve so that travelling can be reasonably stressful again (and not ridiculously stressful!). If these issues continue to be problematic and ticket prices continue to soar, it will definitely have an impact on travelling. Perhaps considering more road trips to nearby destinations will be the temporary option since travelling with young kids does add up quickly." *(Female, 35-44, Canada)*

Extra safety measures in relation to Covid are not a key frustration for most, with some adding that they in fact provide increased comfort around flying.

"Initially I was hesitant to travel as I worried about catching Covid on the plane or at the airport (and I have small children), but now that Covid has been de facto "normalised", I feel more confident. I also think that given all the checks that the airports and airlines conduct (vaccination certificates, masks, tests) it is actually safer to go on a plane rather than the tube in London." (Female, 35-44, UK)

"The problems at airports don't concern me too much as I understand that with the extra safety measures in place, this is bound to take additional time, and I'd rather feel safe while travelling." *(Female, 35-44, Malaysia)*

Some travellers are more inclined to book with providers and airlines that provide flexibility, with a shift away from third-party providers that seem to be less accommodating in relation to fluctuating situations.

"I only buy flights you can rebook now and I actually feel less inclined to book through an accredited travel operator because during a weekend of cancellations because of fires in Summer 21, Delta Air Lines said they would only answer emails from people who booked directly with airline and if you booked through a 3rd party then to call them... which you know is practically impossible." *(Female, 45-54, USA)*

"I now book as far in advance as possible with a flexible option in case of cancellations. I also used to use travel operators such as Kiwi, but now I like to book directly with the airline as this seems to be more flexible now as third party websites don't always offer all the options as booking directly does, such as baggage and flexible tickets etc." *(Female, 38, Malaysia)*

Concern about the inflation of travel costs, and specifically air travel costs, are widespread. Added Covid protocols and the need for tests, which can be expensive are cited as contributing factors in the short-term, but global crises relating to energy shortages, the price of oil and the profit-motives of airlines are seen as factors that will likely have a longer-term impact. In relation to this, some are prioritising affordability ahead of other possible considerations such as comfort or flexibility.

"In the economic aspect, it has made travel more expensive, not only because of the price of the ticket but also because of having to add to it the price of diagnostic tests and various bureaucracies." *(Female, 45-54, Spain)*

"I think airlines have (and will always) take any opportunity to inflate costs and profits and we will continue to not see any of that cost 'trickle down' to the staff or passenger level."*(Female, 35-44, USA)*

"Due to rising fuel prices and the economic impact of Covid, unfortunately it's become a case of booking with the cheapest airline." *(Male, 27, UK)*

"I can foresee having less disposable income to spend on travel as overall the cost of living is going up." *(Female, 42, UK)*

Some are hopeful that the situation at airports and the prices of travel will settle down, but in the context of recent turbulence relating not only to the pandemic but also the invasion of the Ukraine, there is also scepticism about the prospect of normality.

"I think things will over the next year get back to normal but you just never know if something else will happen to prevent that!" *(Female, 55-64, China)*

"I am sure things will settle down and improve soon if the governments are able to contain the new spread of the virus." *(Female, 45-54, UAE)*

"I do think that it's getting easier slowly and countries have less restrictions so hopefully it will get better, but I don't think it will be as it was before." *(Female, 25-34, UAE)*

AUSTRIA

BUSINESS TRAVELLERS

1.5m

Gender

Men 69%

Women 31%

Age

16-24	12%
25-34	25%
35-44	25%
45-54	26%
55-64	13%

Top 5 Airlines Considered by Business Travellers

1	**Austrian Airlines**	**25%**
2	Lufthansa	23%
3	Emirates	14%
4	British Airways	13%
5	Air France	12%

LEISURE TRAVELLERS

4.6m

Gender

Men 50%

Women 50%

Age

16-24	19%
25-34	22%
35-44	21%
45-54	22%
55-64	16%

Top 5 Airlines Considered by Leisure Travellers

1	**Austrian Airlines**	**69%**
2	Lufthansa	62%
3	Emirates	38%
4	British Airways	33%
5	Eurowings	32%

BELGIUM

BUSINESS TRAVELLERS

1.3m

Gender

Men 68%

Women 32%

Age

16-24	16%
25-34	30%
35-44	25%
45-54	20%
55-64	9%

Top 5 Airlines Considered by Business Travellers

1	**Brussels Airlines**	**11%**
2	KLM	7%
3	TUI	7%
4	Lufthansa	7%
5	Air France	6%

LEISURE TRAVELLERS

5.6m

Gender

Men 53%

Women 47%

Age

16-24	21%
25-34	21%
35-44	20%
45-54	21%
55-64	17%

Top 5 Airlines Considered by Leisure Travellers

1	**Brussels Airlines**	**56%**
2	TUI	46%
3	Ryanair	39%
4	KLM	24%
5	Air France	23%

DENMARK

BUSINESS TRAVELLERS

846,821

Gender	
Men	73%
Women	27%

Age	
16-24	17%
25-34	23%
35-44	22%
45-54	23%
55-64	15%

Top 5 Airlines Considered by Business Travellers

1	**Scandinavian Airlines**	**10%**
2	Norwegian Air	8%
3	Lufthansa	7%
4	KLM	6%
5	British Airways	6%

LEISURE TRAVELLERS

3.0m

Gender	
Men	52%
Women	48%

Age	
16-24	21%
25-34	19%
35-44	19%
45-54	22%
55-64	19%

Top 5 Airlines Considered by Leisure Travellers

1	**Norwegian Air**	**41%**
2	Scandinavian Airlines	36%
3	Lufthansa	31%
4	Ryanair	28%
5	KLM	27%

FRANCE

BUSINESS TRAVELLERS

8.1m

Gender	
Men	66%
Women	34%

Age	
16-24	16%
25-34	27%
35-44	25%
45-54	21%
55-64	12%

Top 5 Airlines Considered by Business Travellers

1	**Air France**	**15%**
2	Easyjet	5%
3	Emirates	5%
4	British Airways	5%
5	Lufthansa	5%

LEISURE TRAVELLERS

30.1m

Gender	
Men	52%
Women	48%

Age	
16-24	20%
25-34	20%
35-44	21%
45-54	21%
55-64	18%

Top 5 Airlines Considered by Leisure Travellers

1	**Air France**	**55%**
2	Easyjet	30%
3	Ryanair	21%
4	Lufthansa	16%
5	Emirates	15%

GERMANY

BUSINESS TRAVELLERS

13.4m

Gender

Men
65%

Women
35%

Age

16-24	15%
25-34	24%
35-44	25%
45-54	23%
55-64	14%

Top 5 Airlines Considered by Business Travellers

1	**Lufthansa**	**18%**
2	Emirates	9%
3	Eurowings	9%
4	Condor	8%
5	TUI	8%

LEISURE TRAVELLERS

41.2m

Gender

Men
52%

Women
48%

Age

16-24	17%
25-34	20%
35-44	20%
45-54	24%
55-64	19%

Top 5 Airlines Considered by Leisure Travellers

1	**Lufthansa**	**58%**
2	TUI	38%
3	Condor	34%
4	Eurowings	33%
5	Emirates	27%

MARKET COMPENDIUM: EUROPE

IRELAND

BUSINESS TRAVELLERS

732,036

Gender

Men
66%

Women
34%

Age

16-24	15%
25-34	22%
35-44	31%
45-54	22%
55-64	10%

Top 5 Airlines Considered by Business Travellers

1	**Aer Lingus**	**16%**
2	Ryanair	11%
3	British Airways	10%
4	Emirates	10%
5	Etihad	8%

LEISURE TRAVELLERS

2.5m

Gender

Men
50%

Women
50%

Age

16-24	19%
25-34	20%
35-44	24%
45-54	22%
55-64	15%

Top 5 Airlines Considered by Leisure Travellers

1	**Aer Lingus**	**70%**
2	Ryanair	68%
3	British Airways	34%
4	Emirates	28%
5	Lufthansa	23%

ITALY

BUSINESS TRAVELLERS

7.6m

Gender

Men 68%

Women 32%

Age	
16-24	9%
25-34	22%
35-44	28%
45-54	28%
55-64	13%

Top 5 Airlines Considered by Business Travellers

1	**Ryanair**	**11%**
2	Lufthansa	11%
3	Air France	9%
4	Easyjet	8%
5	Emirates	8%

LEISURE TRAVELLERS

27.2m

Gender

Men 52%

Women 48%

Age	
16-24	17%
25-34	18%
35-44	23%
45-54	25%
55-64	17%

Top 5 Airlines Considered by Leisure Travellers

1	**Ryanair**	**55%**
2	Easyjet	38%
3	Lufthansa	36%
4	Emirates	27%
5	Air France	25%

NETHERLANDS

BUSINESS TRAVELLERS

2.6m

Gender

Men 70%

Women 30%

Age	
16-24	18%
25-34	30%
35-44	26%
45-54	17%
55-64	9%

Top 5 Airlines Considered by Business Travellers

1	**KLM**	**18%**
2	Transavia	7%
3	TUI	6%
4	Emirates	6%
5	Air France / British Airways / Qatar	5%

LEISURE TRAVELLERS

8.4m

Gender

Men 52%

Women 48%

Age	
16-24	21%
25-34	20%
35-44	19%
45-54	21%
55-64	19%

Top 5 Airlines Considered by Leisure Travellers

1	**KLM**	**63%**
2	Transavia	40%
3	TUI	37%
4	Ryanair	24%
5	Easyjet	23%

PORTUGAL

BUSINESS TRAVELLERS

1.4m

Gender

Men 64%

Women 36%

Age

16-24	9%
25-34	25%
35-44	29%
45-54	25%
55-64	12%

Top 5 Airlines Considered by Business Travellers

1	**TAP Portugal**	**24%**
2	Ryanair	16%
3	Easyjet	14%
4	Emirates	12%
5	Air France	10%

LEISURE TRAVELLERS

4.8m

Gender

Men 51%

Women 49%

Age

16-24	17%
25-34	21%
35-44	26%
45-54	23%
55-64	14%

Top 5 Airlines Considered by Leisure Travellers

1	**TAP Portugal**	**69%**
2	Ryanair	56%
3	Easyjet	46%
4	Emirates	27%
5	Air France	26%

SPAIN

BUSINESS TRAVELLERS

7.1m

Gender

Men 65%

Women 36%

Age

16-24	7%
25-34	23%
35-44	31%
45-54	24%
55-64	14%

Top 5 Airlines Considered by Business Travellers

1	**Iberia**	**19%**
2	Vueling	10%
3	Air France	10%
4	Ryanair	9%
5	British Airways / Lufthansa	8%

LEISURE TRAVELLERS

25.1m

Gender

Men 51%

Women 49%

Age

16-24	14%
25-34	18%
35-44	26%
45-54	24%
55-64	18%

Top 5 Airlines Considered by Leisure Travellers

1	**Iberia**	**64%**
2	Ryanair	42%
3	Vueling	41%
4	Air France	28%
5	British Airways	24%

SWEDEN

BUSINESS TRAVELLERS

1.3m

Gender

Men 65%

Women 35%

Age	
16-24	13%
25-34	22%
35-44	25%
45-54	24%
55-64	16%

Top 5 Airlines Considered by Business Travellers

1	**Scandinavian Airlines**	**14%**
2	Lufthansa	12%
3	Norwegian Air	11%
4	KLM	9%
5	British Airways	8%

LEISURE TRAVELLERS

4.9m

Gender

Men 51%

Women 49%

Age	
16-24	19%
25-34	22%
35-44	20%
45-54	22%
55-64	18%

Top 5 Airlines Considered by Leisure Travellers

1	**Scandinavian Airlines**	**45%**
2	Norwegian Air	45%
3	Lufthansa	37%
4	TUI	36%
5	Ryanair	30%

SWITZERLAND

BUSINESS TRAVELLERS

1.4m

Gender

Men 65%

Women 36%

Age	
16-24	12%
25-34	24%
35-44	25%
45-54	24%
55-64	15%

Top 5 Airlines Considered by Business Travellers

1	**SWISS**	**21%**
2	Lufthansa	12%
3	Emirates	10%
4	Edelweiss Air	9%
5	Easyjet	9%

LEISURE TRAVELLERS

4.9m

Gender

Men 50%

Women 50%

Age	
16-24	16%
25-34	22%
35-44	21%
45-54	23%
55-64	18%

Top 5 Airlines Considered by Leisure Travellers

1	**SWISS**	**71%**
2	Easyjet	46%
3	Lufthansa	41%
4	Edelweiss Air	38%
5	Emirates	31%

UK

BUSINESS TRAVELLERS

10.9m

Gender

Men
67%

Women
33%

Age

16-24	19%
25-34	25%
35-44	26%
45-54	20%
55-64	10%

Top 5 Airlines Considered by Business Travellers

1	**British Airways**	**15%**
2	Emirates	10%
3	Virgin	9%
4	Qatar	6%
5	Easyjet	6%

LEISURE TRAVELLERS

33.1m

Gender

Men
50%

Women
50%

Age

16-24	19%
25-34	21%
35-44	21%
45-54	21%
55-64	18%

Top 5 Airlines Considered by Leisure Travellers

1	**British Airways**	**54%**
2	Easyjet	43%
3	Virgin	38%
4	Jet2	34%
5	Emirates	33%

AUSTRALIA

BUSINESS TRAVELLERS

4.9m

Gender

Men
67%

Women
33%

Age

16-24	21%
25-34	28%
35-44	26%
45-54	18%
55-64	8%

Top 5 Airlines Considered by Business Travellers

1	**Qantas**	**18%**
2	Virgin	11%
3	Emirates	10%
4	Singapore Airlines	8%
5	Air New Zealand	8%

LEISURE TRAVELLERS

11.7m

Gender

Men
52%

Women
48%

Age

16-24	20%
25-34	23%
35-44	22%
45-54	19%
55-64	16%

Top 5 Airlines Considered by Leisure Travellers

1	**Qantas**	**57%**
2	Virgin	42%
3	Jetstar	36%
4	Emirates	31%
5	Air New Zealand	29%

CHINA

BUSINESS TRAVELLERS

406.8m

Gender

Men
54%

Women
46%

Age	
16-24	12%
25-34	36%
35-44	30%
45-54	17%
55-64	4%

Top 5 Airlines Considered by Business Travellers

1	**China Eastern**	**17%**
2	Air China	17%
3	China Southern	17%
4	Shanghai Airlines	11%
5	XiamenAir	8%

LEISURE TRAVELLERS

551.2m

Gender

Men
51%

Women
49%

Age	
16-24	20%
25-34	31%
35-44	26%
45-54	16%
55-64	7%

Top 5 Airlines Considered by Leisure Travellers

1	**China Eastern**	**24%**
2	China Southern	24%
3	Air China	24%
4	Shanghai Airlines	15%
5	XiamenAir	11%

HONG KONG

BUSINESS TRAVELLERS

1.9m

Gender

Men
50%

Women
50%

Age	
16-24	7%
25-34	19%
35-44	23%
45-54	26%
55-64	26%

Top 5 Airlines Considered by Business Travellers

1	**Cathay Pacific**	**24%**
2	Cathay Dragon	13%
3	Singapore Airlines	11%
4	Hong Kong Airlines	11%
5	Japan Airlines	9%

LEISURE TRAVELLERS

3.7m

Gender

Men
43%

Women
57%

Age	
16-24	12%
25-34	21%
35-44	22%
45-54	23%
55-64	22%

Top 5 Airlines Considered by Leisure Travellers

1	**Cathay Pacific**	**49%**
2	Hong Kong Airlines	32%
3	Cathay Dragon	31%
4	Japan Airlines	27%
5	Singapore Airlines	20%

INDIA

BUSINESS TRAVELLERS

189m

Gender

Men 65%

Women 36%

Age

16-24	20%
25-34	42%
35-44	26%
45-54	9%
55-64	3%

Top 5 Airlines Considered by Business Travellers

1	**Air India**	**24%**
2	IndiGo	17%
3	Emirates	12%
4	AirAsia	11%
5	Spicejet	8%

LEISURE TRAVELLERS

309m

Gender

Men 63%

Women 37%

Age

16-24	37%
25-34	33%
35-44	19%
45-54	7%
55-64	3%

Top 5 Airlines Considered by Leisure Travellers

1	**Air India**	**44%**
2	IndiGo	34%
3	Emirates	21%
4	AirAsia	17%
5	Spicejet	16%

NEW ZEALAND

BUSINESS TRAVELLERS

681,775

Gender

Men 73%

Women 27%

Age

16-24	23%
25-34	25%
35-44	24%
45-54	20%
55-64	9%

Top 5 Airlines Considered by Business Travellers

1	**Air New Zealand**	**23%**
2	Emirates	12%
3	Qantas	8%
4	Singapore Airlines	8%
5	Qatar	5%

LEISURE TRAVELLERS

2.2m

Gender

Men 52%

Women 48%

Age

16-24	23%
25-34	21%
35-44	19%
45-54	21%
55-64	17%

Top 5 Airlines Considered by Leisure Travellers

1	**Air New Zealand**	**76%**
2	Emirates	43%
3	Qantas	37%
4	Singapore Airlines	31%
5	Jetstar	25%

SINGAPORE

BUSINESS TRAVELLERS

1.5m

Gender

Men
63%

Women
37%

Age

16-24	15%
25-34	20%
35-44	25%
45-54	24%
55-64	16%

Top 5 Airlines Considered by Business Travellers

1	**Singapore Airlines**	**33%**
2	Emirates	11%
3	Cathay Pacific	8%
4	Qatar	8%
5	Japan Airlines	7%

LEISURE TRAVELLERS

2.8m

Gender

Men
52%

Women
48%

Age

16-24	17%
25-34	20%
35-44	22%
45-54	22%
55-64	19%

Top 5 Airlines Considered by Leisure Travellers

1	**Singapore Airlines**	**66%**
2	Scoot	30%
3	Jetstar	25%
4	AirAsia	22%
5	Emirates	22%

SOUTH KOREA

BUSINESS TRAVELLERS

8.9m

Gender

Men
68%

Women
32%

Age

16-24	6%
25-34	21%
35-44	28%
45-54	27%
55-64	20%

Top 5 Airlines Considered by Business Travellers

1	**Korean Air**	**21%**
2	Asiana Airlines	15%
3	Jeju Air	5%
4	Jin Air	4%
5	Air Busan	3%

LEISURE TRAVELLERS

24.8m

Gender

Men
53%

Women
47%

Age

16-24	18%
25-34	20%
35-44	22%
45-54	22%
55-64	18%

Top 5 Airlines Considered by Leisure Travellers

1	**Korean Air**	**56%**
2	Asiana Airlines	43%
3	Jeju Air	22%
4	Jin Air	17%
5	T'way Air	13%

CANADA

BUSINESS TRAVELLERS

6.4m

Gender		Age	
Men	65%	16-24	19%
Women	35%	25-34	25%
		35-44	27%
		45-54	18%
		55-64	11%

Top 5 Airlines Considered by Business Travellers

1	**Air Canada**	**24%**
2	WestJet	14%
3	British Airways	8%
4	Delta	8%
5	United Airlines	7%

LEISURE TRAVELLERS

17.3m

Gender		Age	
Men	51%	16-24	18%
Women	49%	25-34	22%
		35-44	22%
		45-54	20%
		55-64	18%

Top 5 Airlines Considered by Leisure Travellers

1	**Air Canada**	**67%**
2	WestJet	46%
3	Delta	22%
4	American Airlines	20%
5	British Airways	20%

USA

BUSINESS TRAVELLERS

61.3m

Gender		Age	
Men	63%	16-24	15%
Women	37%	25-34	32%
		35-44	26%
		45-54	18%
		55-64	9%

Top 5 Airlines Considered by Business Travellers

1	**American Airlines**	**17%**
2	Delta	15%
3	United Airlines	15%
4	Southwest Airlines	11%
5	JetBlue	8%

LEISURE TRAVELLERS

149.2m

Gender		Age	
Men	51%	16-24	18%
Women	49%	25-34	24%
		35-44	21%
		45-54	19%
		55-64	18%

Top 5 Airlines Considered by Leisure Travellers

1	**Delta**	**42%**
2	American Airlines	42%
3	United Airlines	40%
4	Southwest Airlines	36%
5	JetBlue	23%

ARGENTINA

BUSINESS TRAVELLERS

6.2m

Gender

Men
64%

Women
36%

Age	
16-24	16%
25-34	32%
35-44	26%
45-54	17%
55-64	10%

Top 5 Airlines Considered by Business Travellers

1	**Aerolineas Argentinas**	**20%**
2	LATAM	14%
3	American Airlines	10%
4	United Airlines	7%
5	Emirates	7%

LEISURE TRAVELLERS

18.5m

Gender

Men
52%

Women
49%

Age	
16-24	23%
25-34	25%
35-44	24%
45-54	17%
55-64	12%

Top 5 Airlines Considered by Leisure Travellers

1	**Aerolineas Argentinas**	**59%**
2	LATAM	42%
3	American Airlines	26%
4	Emirates	17%
5	Qatar	14%

BRAZIL

BUSINESS TRAVELLERS

45m

Gender

Men
56%

Women
44%

Age	
16-24	20%
25-34	31%
35-44	25%
45-54	16%
55-64	8%

Top 5 Airlines Considered by Business Travellers

1	**Gol**	**31%**
2	Azul	27%
3	LATAM	26%
4	American Airlines	11%
5	Emirates	10%

LEISURE TRAVELLERS

88m

Gender

Men
50%

Women
50%

Age	
16-24	24%
25-34	27%
35-44	23%
45-54	16%
55-64	10%

Top 5 Airlines Considered by Leisure Travellers

1	**Gol**	**59%**
2	Azul	52%
3	LATAM	48%
4	American Airlines	19%
5	Emirates	18%

ISRAEL

BUSINESS TRAVELLERS

1.5m

Gender

Men 71%

Women 29%

Age	
16-24	27%
25-34	25%
35-44	21%
45-54	19%
55-64	9%

Top 5 Airlines Considered by Business Travellers

1	El Al	19%
2	Israir	9%
3	Arkia	8%
4	Lufthansa	7%
5	American Airlines	7%

LEISURE TRAVELLERS

4.0m

Gender

Men 55%

Women 45%

Age	
16-24	26%
25-34	22%
35-44	21%
45-54	18%
55-64	13%

Top 5 Airlines Considered by Leisure Travellers

1	El Al	61%
2	Arkai	38%
3	Israir	37%
4	British Airways	23%
5	Lufthansa	22%

SAUDI ARABIA

BUSINESS TRAVELLERS

8.9m

Gender

Men 68%

Women 32%

Age	
16-24	12%
25-34	35%
35-44	35%
45-54	15%
55-64	3%

Top 5 Airlines Considered by Business Travellers

1	Saudia	37%
2	Emirates	21%
3	Qatar	13%
4	Flynas	12%
5	Etihad	11%

LEISURE TRAVELLERS

16.4m

Gender

Men 60%

Women 40%

Age	
16-24	23%
25-34	30%
35-44	29%
45-54	14%
55-64	3%

Top 5 Airlines Considered by Leisure Travellers

1	Saudia	66%
2	Emirates	38%
3	Flynas	24%
4	SaudiGulf Airlines	23%
5	Qatar	20%

SOUTH AFRICA

BUSINESS TRAVELLERS

10.2m

Gender

Men 60%

Women 40%

Age	
16-24	23%
25-34	38%
35-44	23%
45-54	11%
55-64	5%

Top 5 Airlines Considered by Business Travellers

1	**Emirates**	**25%**
2	British Airways	24%
3	Qatar	14%
4	FlySafair	12%
5	Mango	11%

LEISURE TRAVELLERS

20.6m

Gender

Men 53%

Women 47%

Age	
16-24	30%
25-34	32%
35-44	20%
45-54	11%
55-64	7%

Top 5 Airlines Considered by Leisure Travellers

1	**Emirates**	**45%**
2	Mango	42%
3	British Airways	41%
4	FlySafair	38%
5	kulula.com	30%

UAE

BUSINESS TRAVELLERS

4.3m

Gender

Men 83%

Women 17%

Age	
16-24	8%
25-34	43%
35-44	31%
45-54	14%
55-64	4%

Top 5 Airlines Considered by Business Travellers

1	**Emirates**	**46%**
2	Etihad	26%
3	Flydubai	14%
4	Qatar	12%
5	Air Arabia	10%

LEISURE TRAVELLERS

6.9m

Gender

Men 76%

Women 24%

Age	
16-24	13%
25-34	37%
35-44	31%
45-54	15%
55-64	4%

Top 5 Airlines Considered by Leisure Travellers

1	**Emirates**	**69%**
2	Etihad	40%
3	Flydubai	30%
4	Air Arabia	28%
5	Qatar	16%