

Travel in the US

September 2023

Table of Contents

Travel in the US

EXECUTIVE SUMMARY

Travel in 2023

Airlines: Key trends

Hotels: Key trends

Booking: Key trends

What next for travel?

MARKET DATA

- Table 1 Surface Travel Modes Sales: Value 2018-2023
- Table 2 Surface Travel Modes Online Sales: Value 2018-2023
- Table 3 Forecast Surface Travel Modes Sales: Value 2023-2028
- Table 4 Forecast Surface Travel Modes Online Sales: Value 2023-2028
- Table 5 In-Destination Spending: Value 2018-2023
- Table 6 Forecast In-Destination Spending: Value 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Tourism Flows in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Strong tailwinds for inbound and outbound travel

Domestic trips recover in 2023

PROSPECTS AND OPPORTUNITIES

Strong US dollar and visa issues could threaten inbound travel

Business travel will continue to recover; leisure travellers increasingly look for value

CATEGORY DATA

- Table 7 Inbound Arrivals: Number of Trips 2018-2023
- Table 8 Inbound Arrivals by Country: Number of Trips 2018-2023
- Table 9 Inbound City Arrivals 2018-2023
- Table 10 Inbound Tourism Spending: Value 2018-2023
- Table 11 Forecast Inbound Arrivals: Number of Trips 2023-2028
- Table 12 Forecast Inbound Arrivals by Country: Number of Trips 2023-2028
- Table 13 Forecast Inbound Tourism Spending: Value 2023-2028
- Table 14 Domestic Trips by Destination: Number of Trips 2018-2023
- Table 15 Domestic Spending: Value 2018-2023
- Table 16 Forecast Domestic Trips by Destination: Number of Trips 2023-2028
- Table 17 Forecast Domestic Spending: Value 2023-2028
- Table 18 Outbound Departures: Number of Trips 2018-2023
- Table 19 Outbound Departures by Destination: Number of Trips 2018-2023
- Table 20 Outbound Tourism Spending: Value 2018-2023
- Table 21 Forecast Outbound Departures: Number of Trips 2023-2028
- Table 22 Forecast Outbound Departures by Destination: Number of Trips 2023-2028
- Table 23 Forecast Outbound Spending: Value 2023-2028

Airlines in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Airlines' profits see recovery in 2023

Staffing shortages make it difficult for airlines to meet demand

PROSPECTS AND OPPORTUNITIES

Possible headwinds for airlines

Growth at both ends of the spectrum - extreme low-cost and luxury leisure

CATEGORY DATA

Table 24 - Airlines Sales: Value 2018-2023

Table 25 - Airlines Online Sales: Value 2018-2023

Table 26 - Airlines: Passengers Carried 2018-2023

Table 27 - Airlines NBO Company Shares: % Value 2018-2022

Table 28 - Non-Scheduled Carriers Brands by Key Performance Indicators 2023

Table 29 - Low Cost Carriers Brands by Key Performance Indicators 2023

Table 30 - Full Service Carriers Brands by Key Performance Indicators 2023

Table 31 - Forecast Airlines Sales: Value 2023-2028

Table 32 - Forecast Airlines Online Sales: Value 2023-2028

Lodging (Destination) in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for lodging in the leisure segment remains strong; in business, it continues to recover Blended travel continues to influence developments in lodging

PROSPECTS AND OPPORTUNITIES

Value as a brand differentiator

Sustainability and branding

CATEGORY DATA

Table 33 - Lodging (Destination) Sales: Value 2018-2023

Table 34 - Lodging (Destination) Online Sales: Value 2018-2023

Table 35 - Hotels Sales: Value 2018-2023

Table 36 - Hotels Online Sales: Value 2018-2023

Table 37 - Other Lodging Sales: Value 2018-2023

Table 38 - Other Lodging Online Sales: Value 2018-2023

Table 39 - Lodging (Destination) Outlets: Units 2018-2023

Table 40 - Lodging (Destination) Rooms: Number of Rooms 2018-2023

Table 41 - Lodging (Destination) by Incoming vs Domestic: % Value 2018-2023

Table 42 - Hotels NBO Company Shares: % Value 2018-2022

Table 43 - Hotel Brands by Key Performance Indicators 2023

Table 44 - Forecast Lodging (Destination) Sales: Value 2023-2028

Table 45 - Forecast Lodging (Destination) Online Sales: Value 2023-2028

Table 46 - Forecast Hotels Sales: Value 2023-2028

Table 47 - Forecast Hotels Online Sales: Value 2023-2028

Table 48 - Forecast Other Lodging Sales: Value 2023-2028

Table 49 - Forecast Other Lodging Online Sales: Value 2023-2028

Table 50 - Forecast Lodging (Destination) Outlets: Units 2023-2028

Booking in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Business travel bookings are on the rebound Expedia's One Key as a disruptor

PROSPECTS AND OPPORTUNITIES

Direct booking continues to evolve
All-inclusive pricing is gaining traction

CATEGORY DATA

Table 51 - Booking Sales: Value 2018-2023

Table 52 - Business Travel Sales: Value 2018-2023

Table 53 - Leisure Travel Sales: Value 2018-2023

Table 54 - Travel Intermediaries NBO Company Shares: % Value 2018-2023

Table 55 - Forecast Booking Sales: Value 2023-2028

Table 56 - Forecast Business Travel Sales: Value 2023-2028

Table 57 - Forecast Leisure Travel Sales: Value 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer
 trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with
 country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/travel-in-the-us/report.