

Competitor Strategies in Travel

February 2023

Table of Contents

COMPETITOR STRATEGIES IN TRAVEL

Scope

Key takeaways

AIRLINES

US carriers dominate global airline spending

Airlines see strong growth, but inflation remains a threat

Travel restrictions contribute to fragmentation in Asia and Eastern Europe

Chinese airlines set to return to prominence

Inflation drives up cost of global airfares

International travel drives full-service airlines' recovery

LODGING

Airbnb leads global lodging

Strong recovery post pandemic for lodging

Inflation to force lodging providers to look for efficiencies

Short-term rentals ahead of the global lodging recovery curve

Lodging a fragmented market, except in North America

Despite globalisation, developed markets dominate most key players' revenues

Key players rely on few core brand, despite expanding brand portfolios

Loyalty programmes help global chains increase share and online direct sales

Global rankings predicted to see only minor changes

TRAVEL INTERMEDIARIES

Airbnb surges in travel intermediary rankings

Intermediaries enjoy strong post-lockdown recovery

Short-term rentals drive growth for intermediaries

Business intermediaries struggle to recover sales

Travel intermediaries focus on customer loyalty

Package holidays outpace overall intermediaries growth

KEY FINDING

Key takeaways

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