Competitor Strategies in Travel

February 2023

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COMPETITOR STRATEGIES IN TRAVEL

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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
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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

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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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