



Euromonitor
International

Beyond Affordability: How Premium Drives Value in Travel

July 2025

EXECUTIVE SUMMARY

Why read this report?

Key findings

INTRODUCTION

Despite income lag, consumers want elevated experiences that justify their spend

Amid high costs and rising expectations, premium is a necessity

PREMIUM MEANS MEANINGFUL, NOT PRICEY

Premium is about making consumers feel they are getting something personally relevant

Sonder: Offering premium stays through design and technology

Breeze Airways offers tiered bundles that let travellers pay more for what matters to them

The meaning of “premium” varies across different travel sectors

DEEP INSIGHTS INTO TRAVELLER TYPES ARE A COMPETITIVE EDGE

Understanding what matters to different traveller types is critical for business success

Varying preferences by traveller types

CitizenM: Elevating perceived value through brand personality

Hilton x Autocamp: Diversifying demand through lifestyle adjacency

Unlock revenue growth with granular insights into different traveller types

PERSONALISATION AT SCALE

If it feels personal, it feels premium

Airbnb pivots to a holistic ecosystem focused on personalisation and affordability

JetBlue Airways: Blueprint for predictive travel personalisation

The most powerful form of premium is personal relevance

CONCLUSION

Pivot to premium for value creation in travel: How to win

Evolution of pivot to premium in travel

Questions we are asking

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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/beyond-affordability-how-premium-drives-value-in-travel/report.