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.