

2022-2023:

THE YEAR IN REVIEW & THE YEAR AHEAD



DECEMBER 14, 2022

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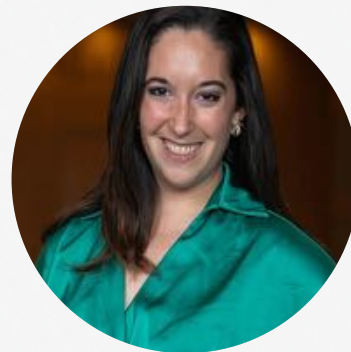
Elena Prostova

*Vice President
Miles Partnership*



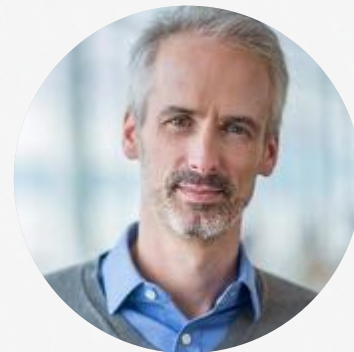
Carolina Sass de Haro

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*Co-Founder & CEO
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WEBINAR RESOURCES



Research, slides and other resources will be sent by email and available at www.MilesPartnership.com/Phocuswright

Trends to Watch

1. Travel Tech & Marketing
2. Evolution of Accommodations
3. International Travel Recovery
4. Generational Shifts in Experiences

#1

TRAVEL TECH & MARKETING TRENDS TO WATCH

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Last Year:

~~Tech to solve COVID~~
~~Ancillary Sales => Unbundling~~
Fintech

This Year:

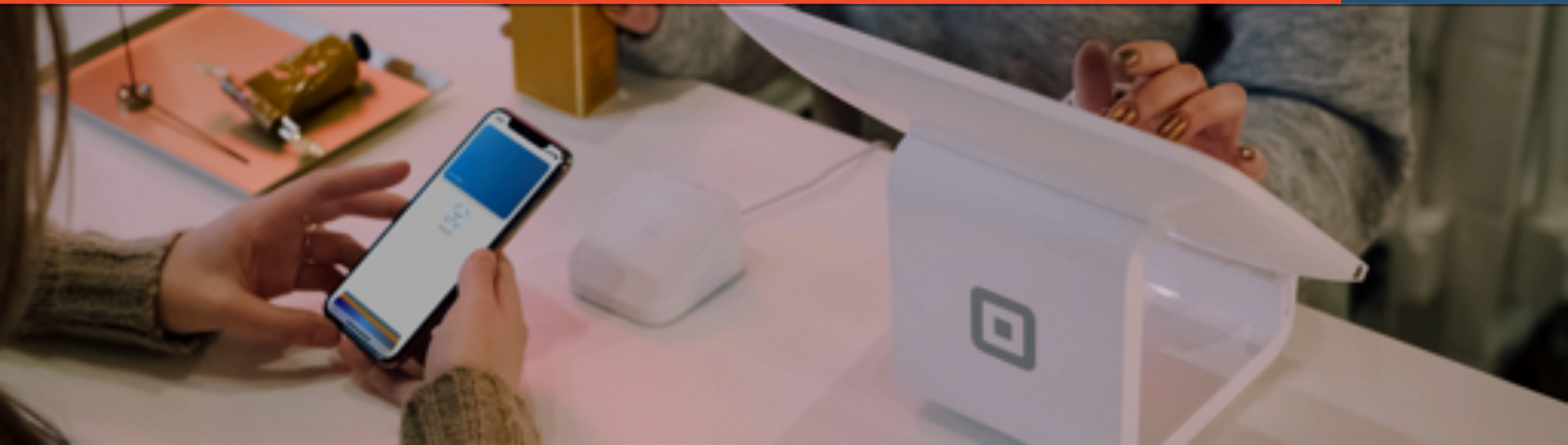
Fintech
Attribute-Based Selling
Subscriptions Evolve
Evolution of
Inspiration/Shopping





FINTECH

Reduce processing costs, provide traveler flexibility and minimize friction for business travelers



Trend 1: Fintech

Fintech and Travel



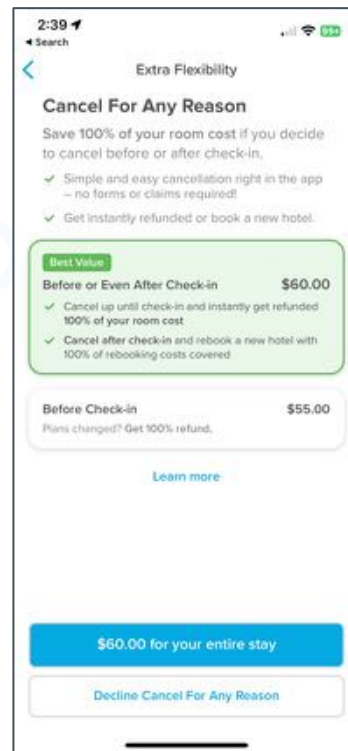
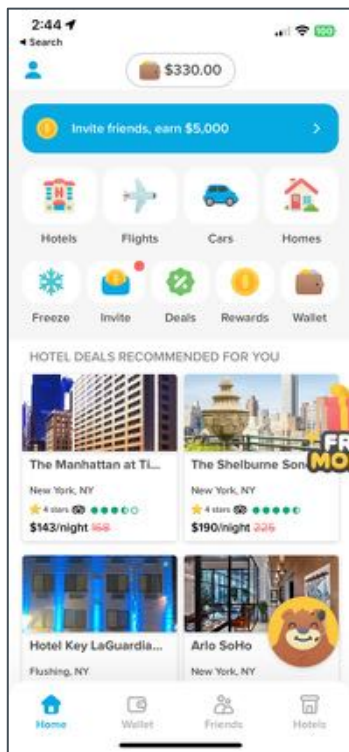
Trend 1: Fintech

Travel's Fintech Future



Hopper and Fintech

Price Prediction, Price Freeze, Cancel For Any Reason Before or After Check-in





ATTRIBUTE-BASED SELLING

Inspire loyal guests to spend more, return often and become brand advocates



Trend 2: Attribute-based Selling

Merchandising



Trend 2: Attribute-based Selling

Revenue Management



Examples of ABS

PhocusWire 

 HOT TRAVEL STARTUPS 2023



HOT 25 TRAVEL STARTUPS FOR 2023: GAUVENDI





SUBSCRIPTION ECONOMY



Travel Subscriptions



eDreamsPrime Flights Hotels Flight + Hotel Car rental Shuttles and transfers

30-day FREE trial

**LOWEST PRICES.*
NO SURPRISES**

Join 3 million Prime members already saving.

Just search for
FREE for 30 day
Cancel anytime.

Start my 30-day



**GOWILD! ALL-YOU-CAN-FLY
PASS™**

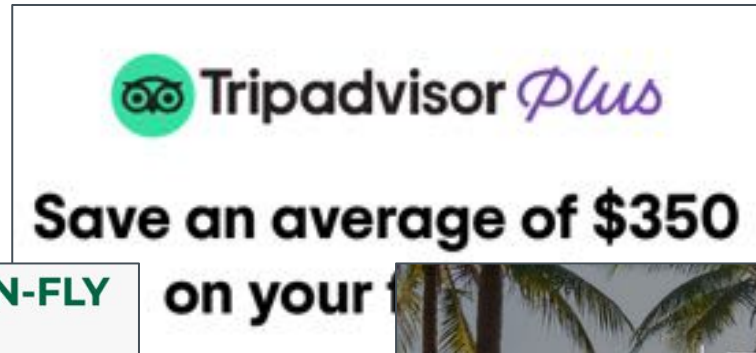
Go Wild!
ALL-YOU-CAN-FLY

ON SALE FOR \$799/YR!

A limited number of passes will be made available at this price; the sale ends at 11:59 PM Mountain Time on December 12, 2022.

Retail and Renewal Price \$1,999/yr

BUY NOW



Tripadvisor Plus

Save an average of \$350

on your f



INSPIRATO | PASS

Experience the world's first luxury travel subscription

Subscribe to luxury travel for \$2,500 per month, all nightly rates, taxes, and fees included.

By January 1, 2023, the Pass subscription will increase to \$2,500/month and annual rates will increase to \$2,500.

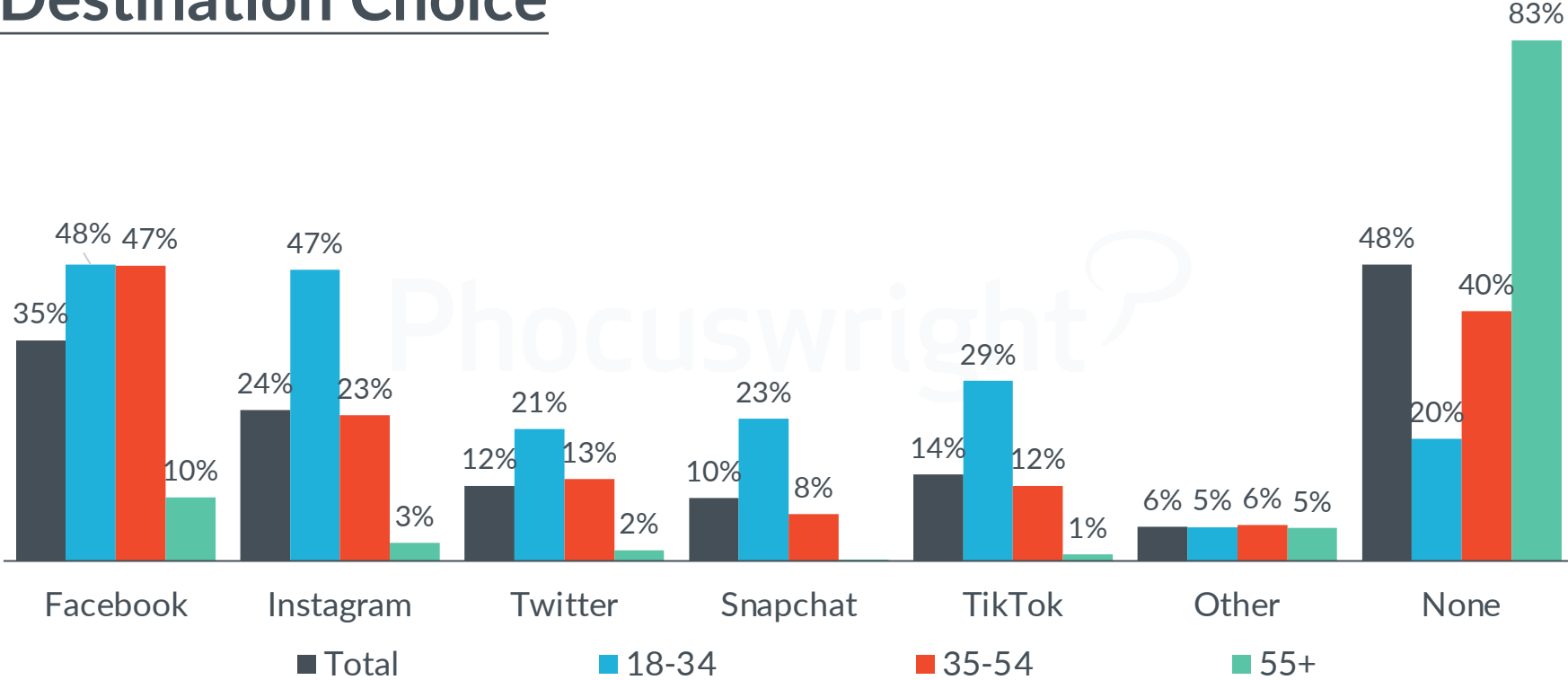




EVOLUTION OF SHOPPING & INSPIRATION



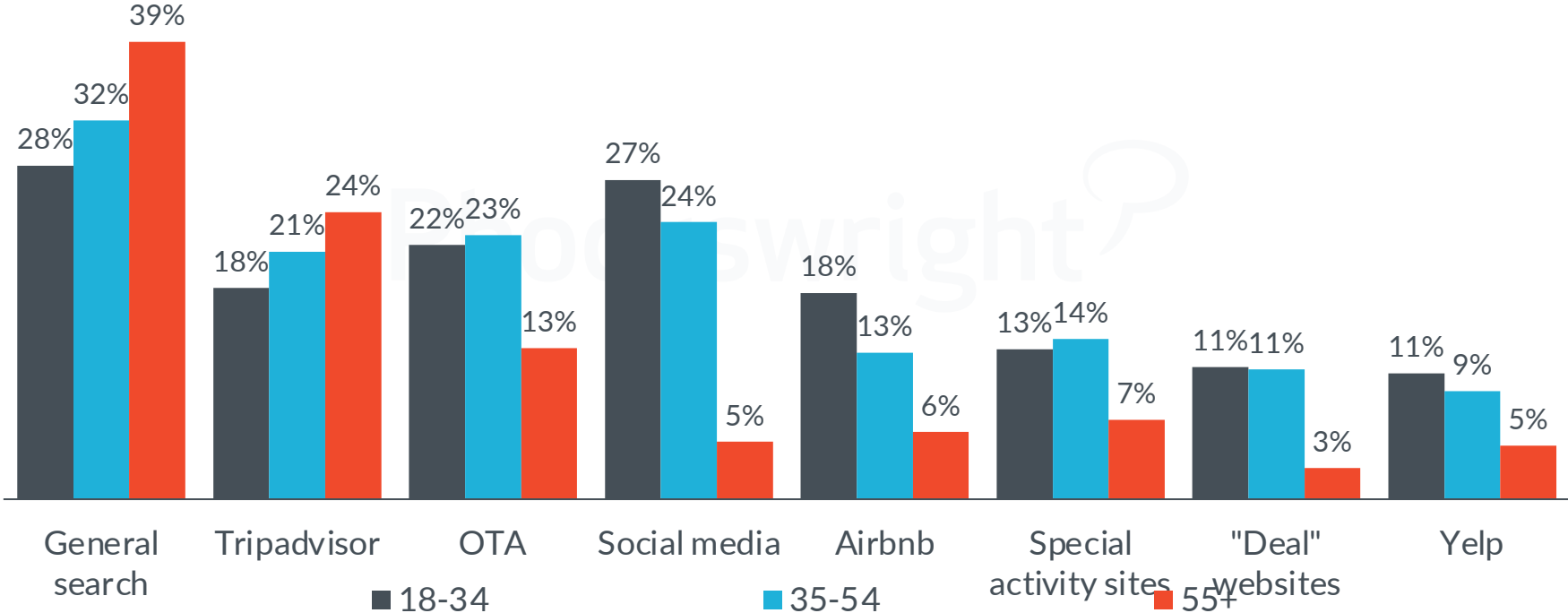
Social Media Sources Used to Help Make Destination Choice



Source: Phocuswright's U.S. Consumer Travel Report 2022



Online Sources Typically Used to Research In-Destination Activities, by Age



Source: Phocuswright's U.S. Consumer Travel Report 2022

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A person in a pink jacket stands in the foreground, looking out over a landscape filled with hot air balloons at dawn. The sky is a soft, pale blue, and several colorful balloons are visible in the air. The overall scene is serene and evocative of travel and adventure.

TRAVEL TECH & MARKETING

EXAMPLES IN ACTION

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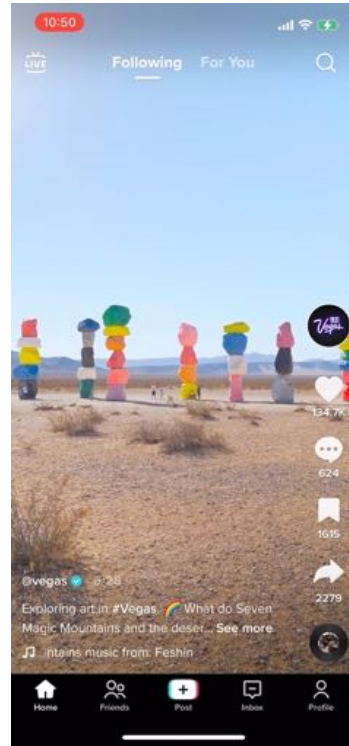


CONTENT ON TIKTOK

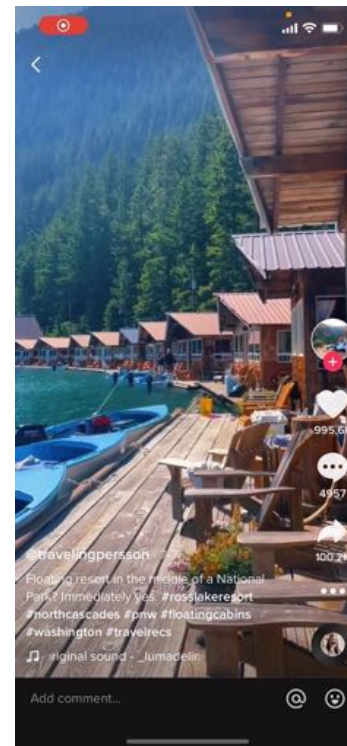
Adventures



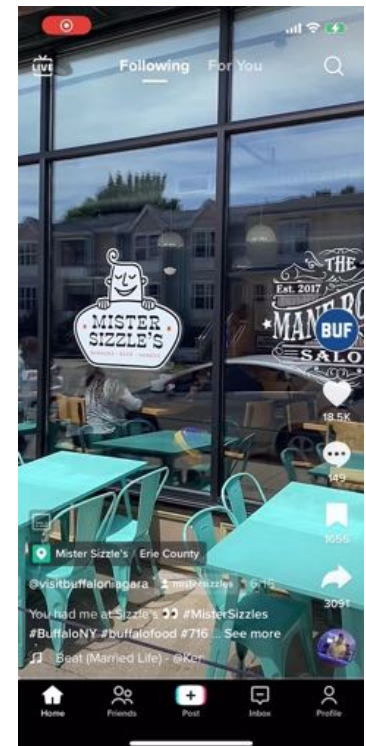
Unusual Findings



Hidden Gems



Food



TIKTOK

Destinations Analysts' TikTok Content Co-operative Research Study

Resources:

www.milespartnership.com/online-video-research-resources



SUBSCRIPTION MODELS IN TRAVEL



SUBSCRIPTION MODELS IN TRAVEL



[Book](#) [Manage](#) [Check in](#) [Where we fly](#) [Traveling with us](#) [Mileage Plan](#)

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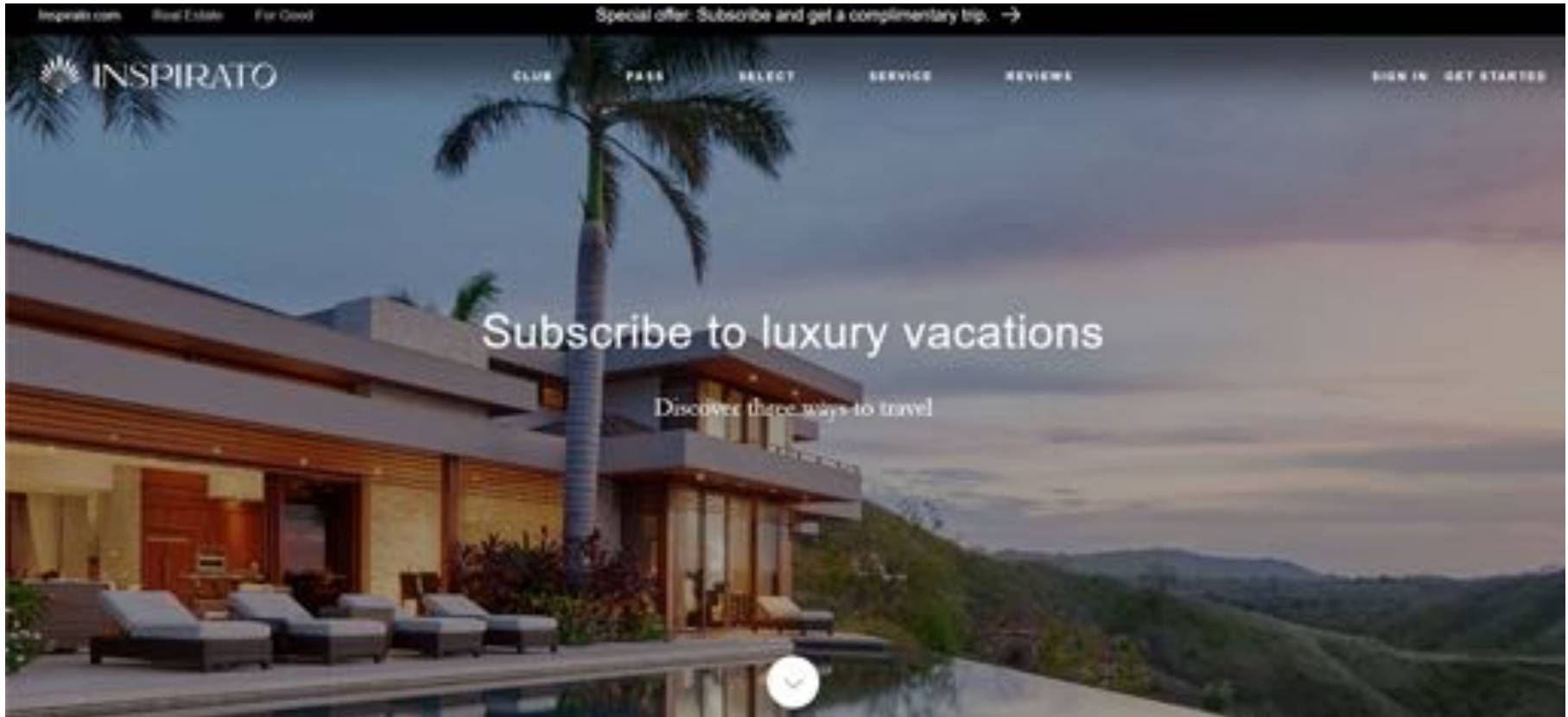


With an Alaska Airlines Flight Pass subscription, you'll land frequent, flexible flights for one monthly fee from \$49/month. Ready to choose your own travel adventure?

[Subscribe to Flight Pass](#)

From
SAN DIEGO
To
FRESNO/YOSEMITE
MONTEREY
SACRAMENTO
SALT LAKE CITY
SAN FRANCISCO
SAN JOSE
SAN LUIS OBISPO
SANTA ROSA

SUBSCRIPTION MODELS IN TRAVEL



SUBSCRIPTION MODELS IN TRAVEL



SUBSCRIPTION MODELS IN TRAVEL



#2

EVOLUTION OF ACCOMMODATIONS

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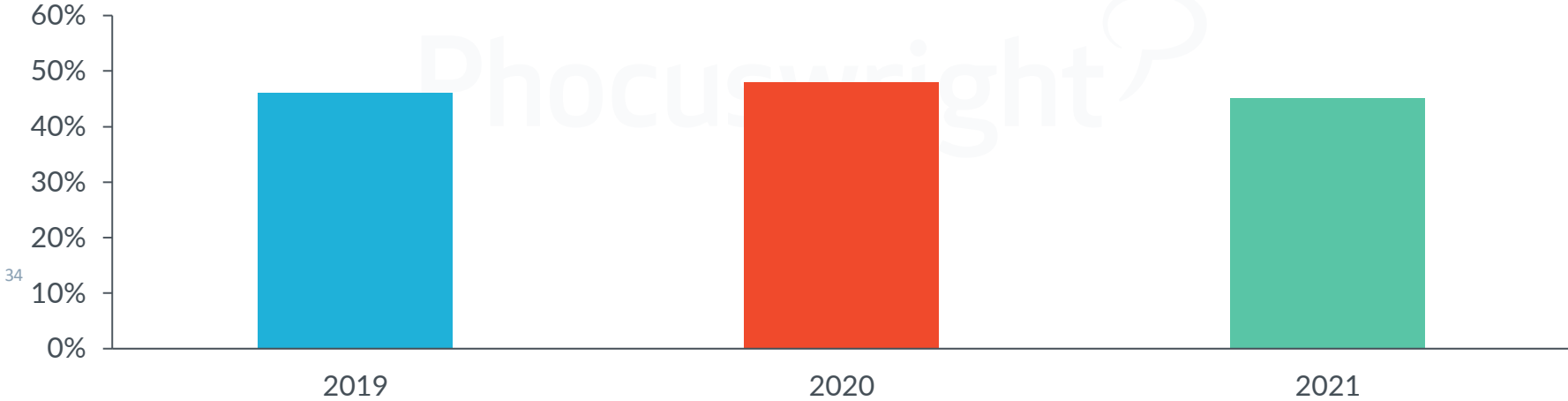
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Incidence of Hotel vs. STR Use



Travelers have kept their comparison habits through the pandemic

STR Users Who Compared Rentals With Hotels



Source: Phocuswright's U.S. Consumer Travel Reports 2020-2022



Inherent STR strengths, according to travelers:



Character



Local
immersion



Privacy



Personalized
experience

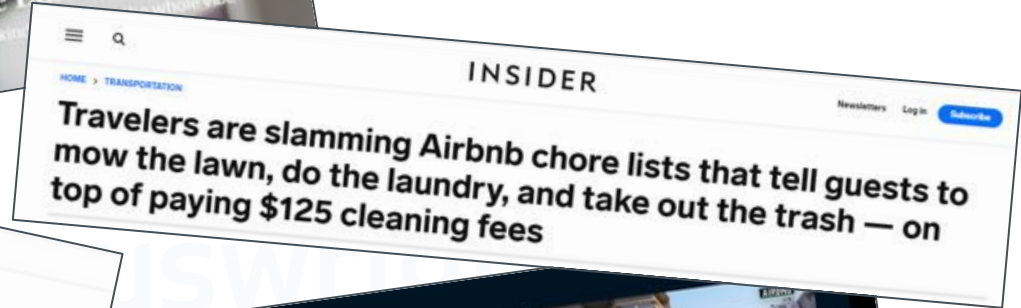


Value for
money



Overall
comfort





Hilton

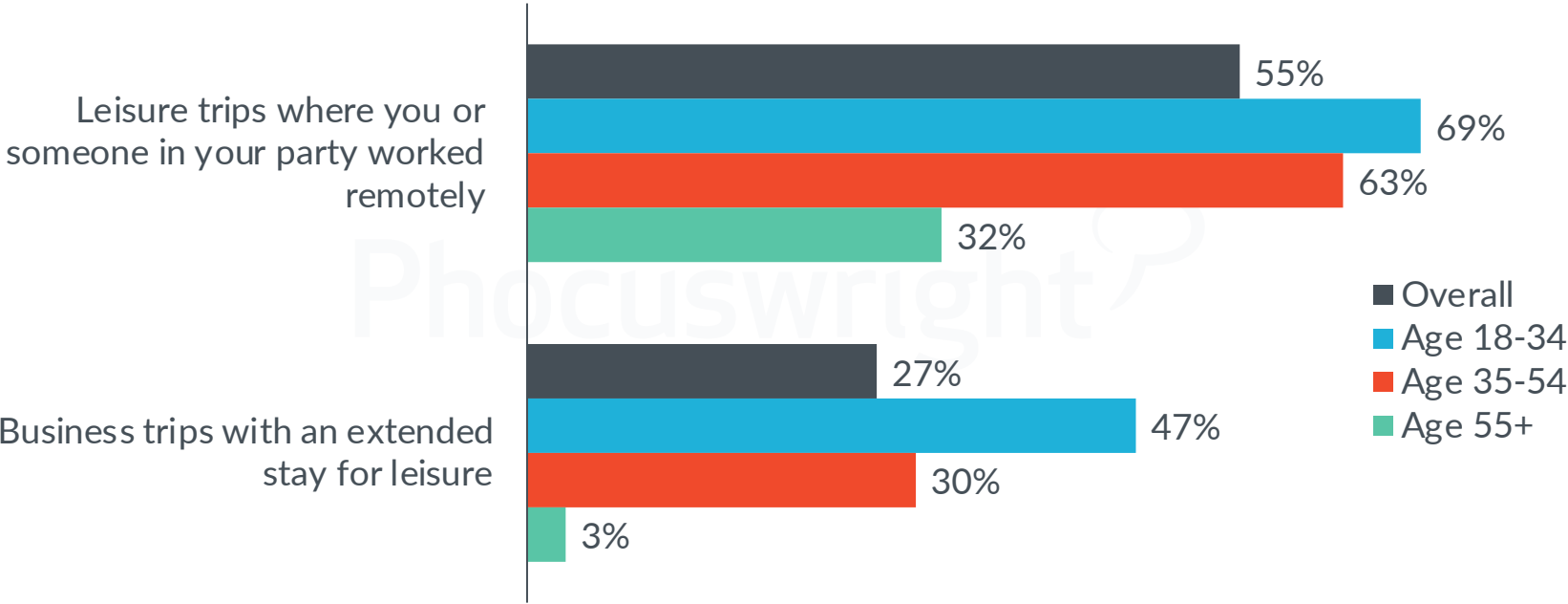




THE BLENDED TRAVELER'S ACCOMMODATIONS

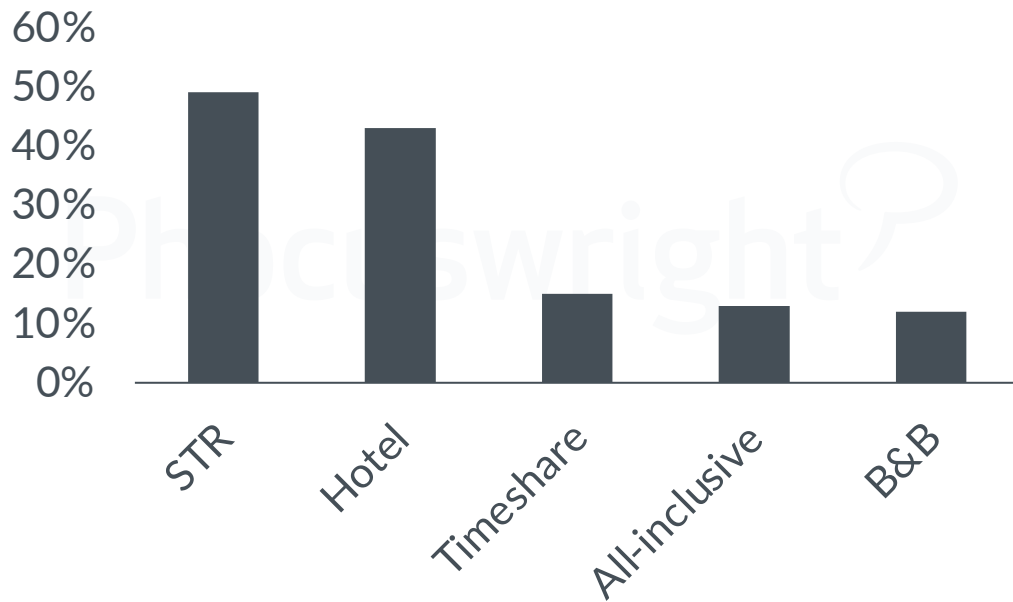


Types of Trips Taken in Past 12 Months





Top 5 Paid Lodging Categories Used by Nomads/Blended Travelers



Source: Phocuswright's *The New Nomad: Work and Play From Anywhere 2021*



Top features sought when working remotely from lodging



Strong Wi-Fi



Strong cell reception



Reviews from other remote workers



Desk space



Table space



Secluded areas


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EVOLUTION OF ACCOMMODATIONS

EXAMPLES IN ACTION

Tourism Meets Economic Development



35% of U.S. travelers plan to work remotely for at least two weeks in 2023

EVOLUTION OF ACCOMMODATIONS



EVANISMERE

ABOUT BRANDS COLLABORATE WITH US STUDIOS POSITIVE IMPACT

Hotels & Coworking

Brands Founders Develop with us



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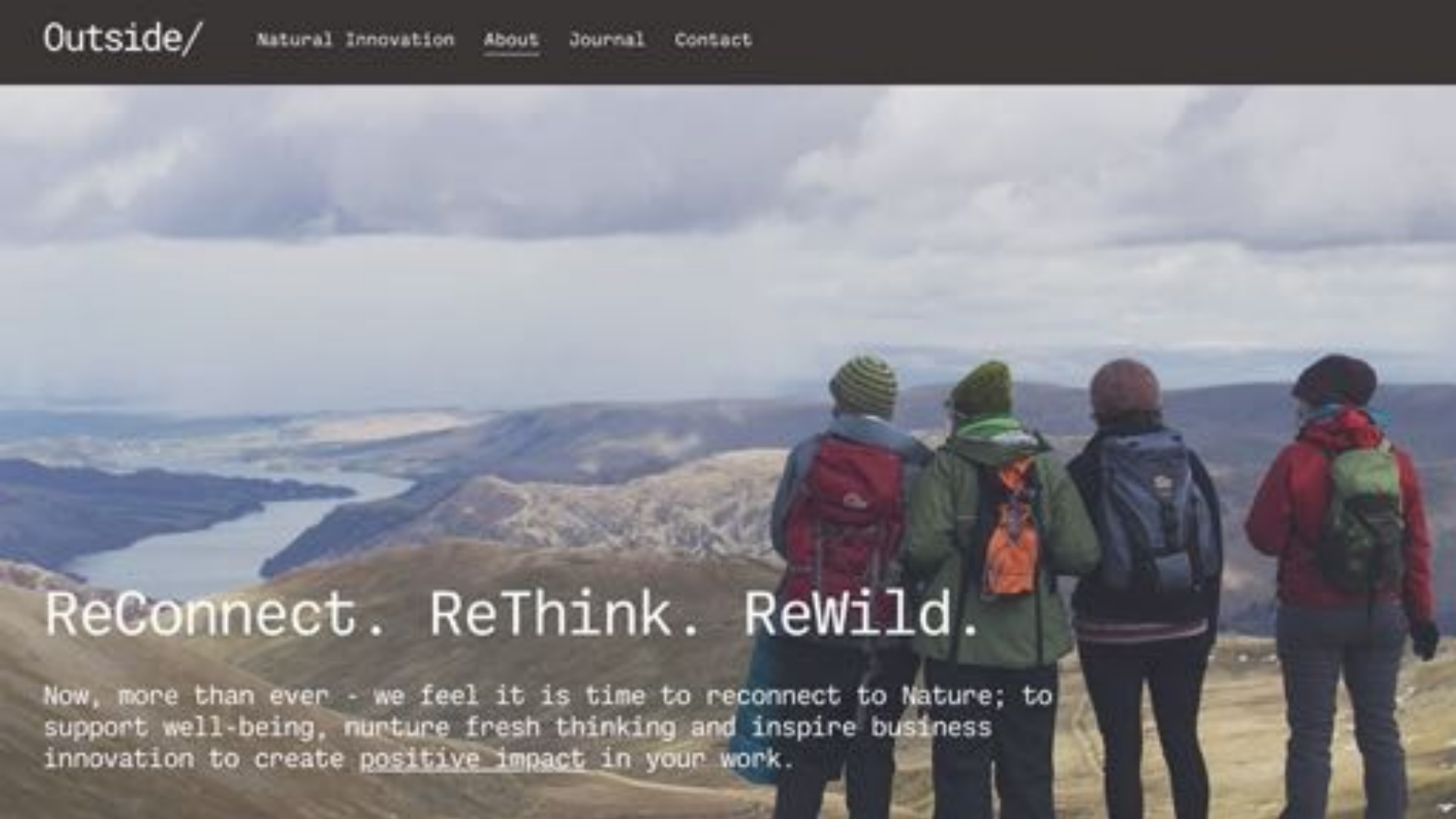


Become a franchise partner with the industry leader.

We invented the hybrid workspace model more than 30 years ago.

APPLY





ReConnect. ReThink. ReWild.

Now, more than ever - we feel it is time to reconnect to Nature; to support well-being, nurture fresh thinking and inspire business innovation to create positive impact in your work.

#3

INTERNATIONAL TRAVEL RECOVERY

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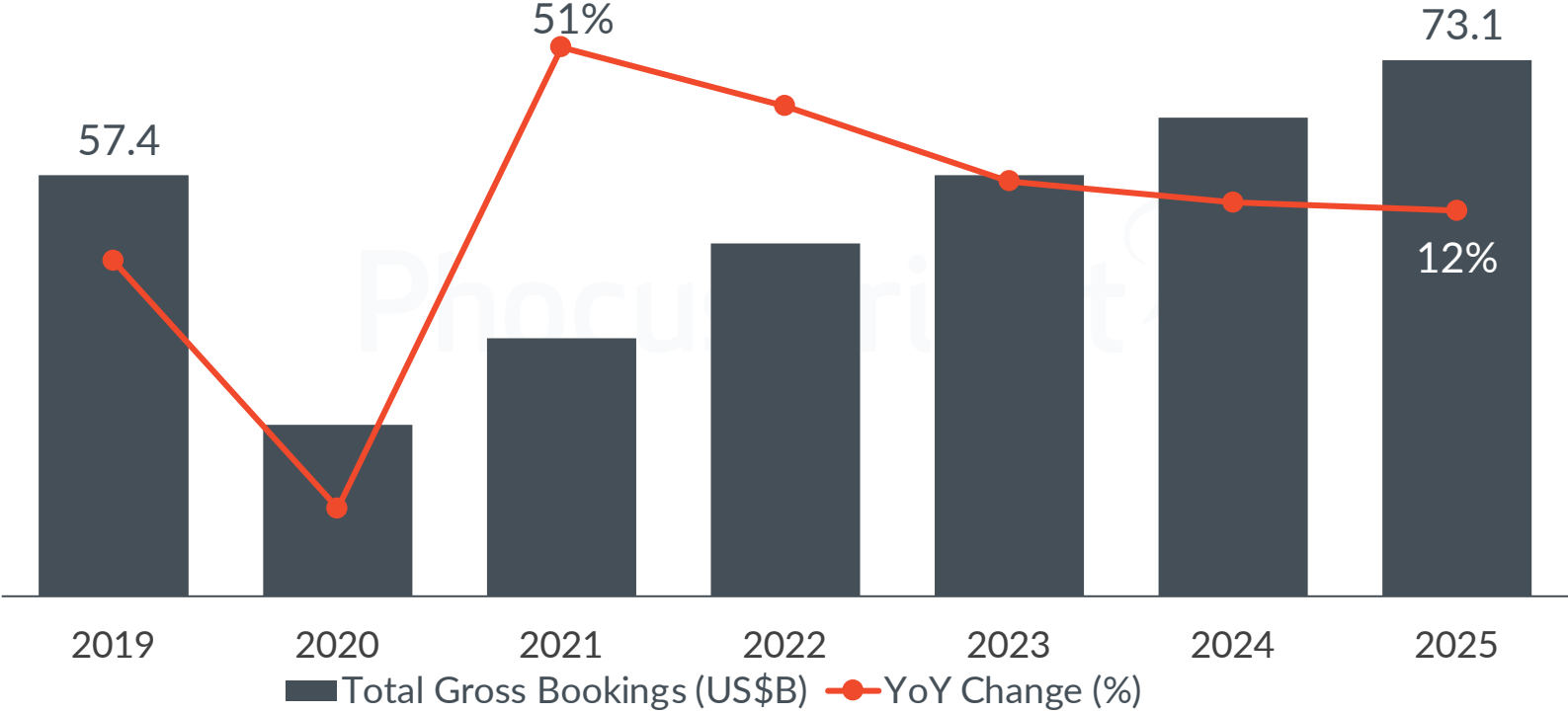


SPOTLIGHT

LATIN AMERICA



Total Travel Gross Bookings (US\$B) and YoY Change (%), 2019-2025



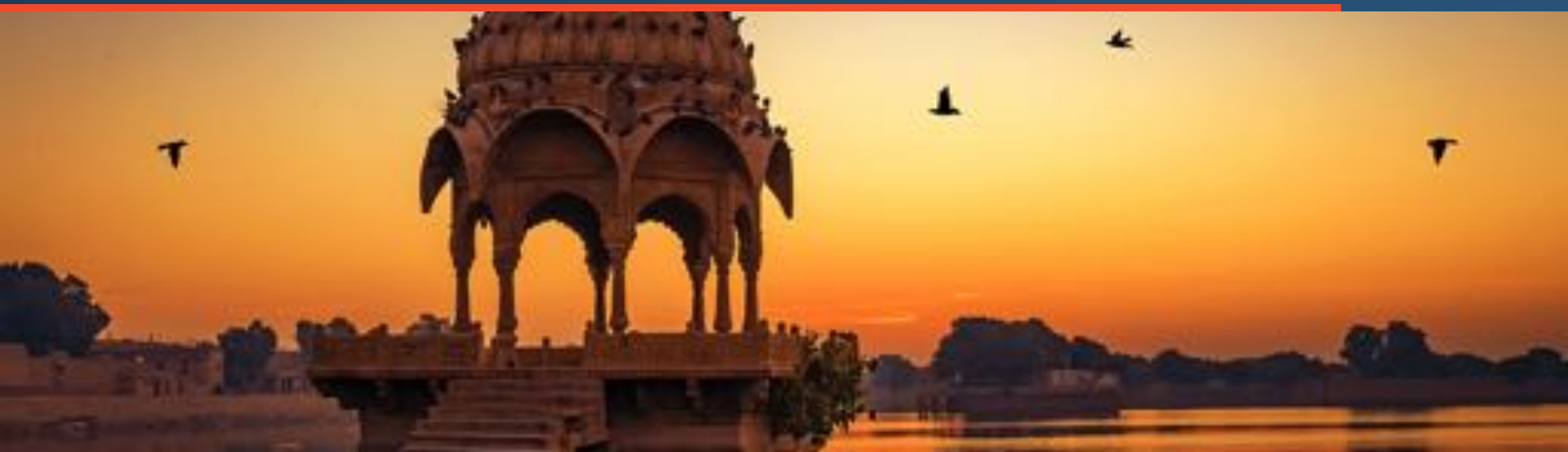
Note: 2022-2025 projected. Annual change indexed to 2019.
Source: Phocuswright's Latin America Travel Market Report 2021-2025



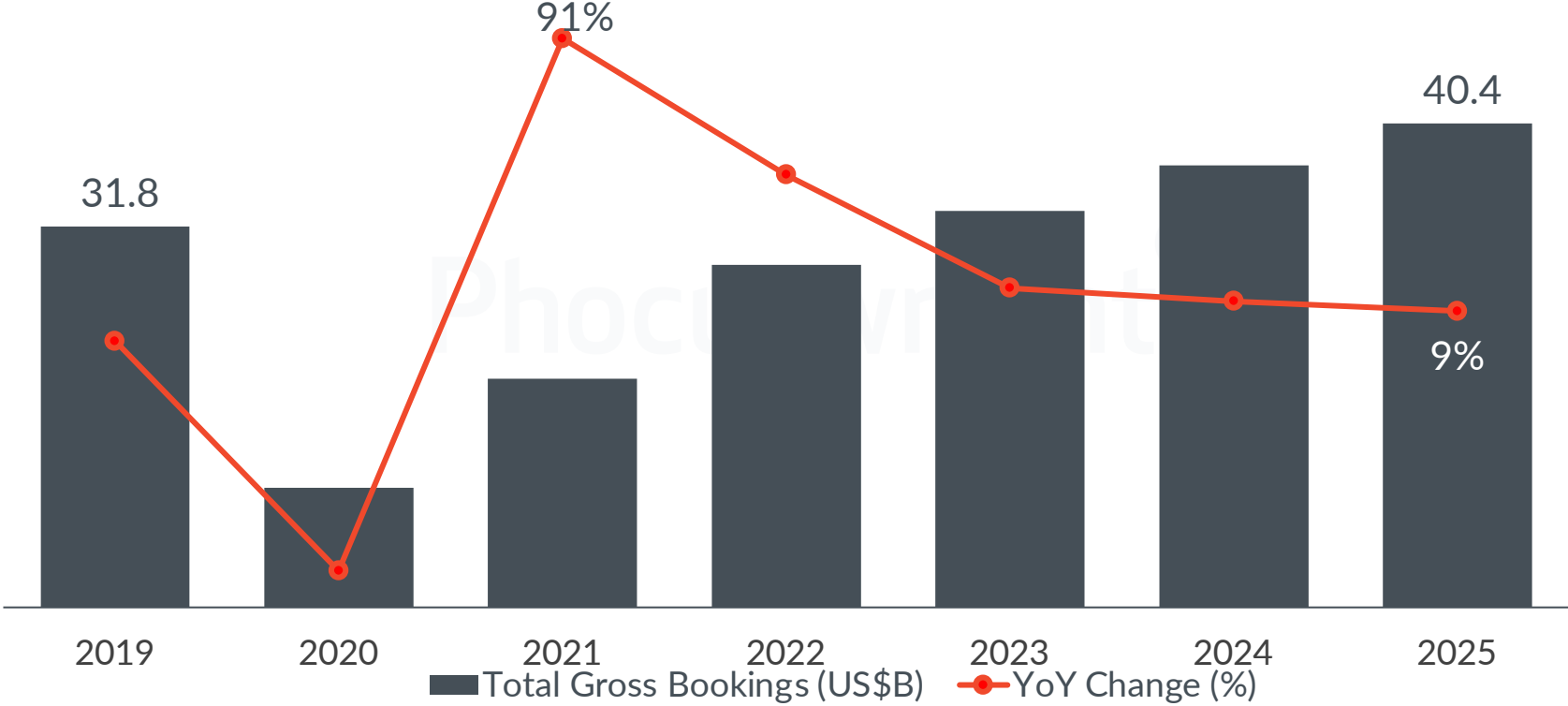


SPOTLIGHT

INDIA



India: Total Travel Gross Bookings (US\$B) and YoY Change (%), 2019-2025



Note: 2021-2025 projected. Annual change indexed to 2019.
Source: Phocuswright's India Travel Market Report 2021-2025



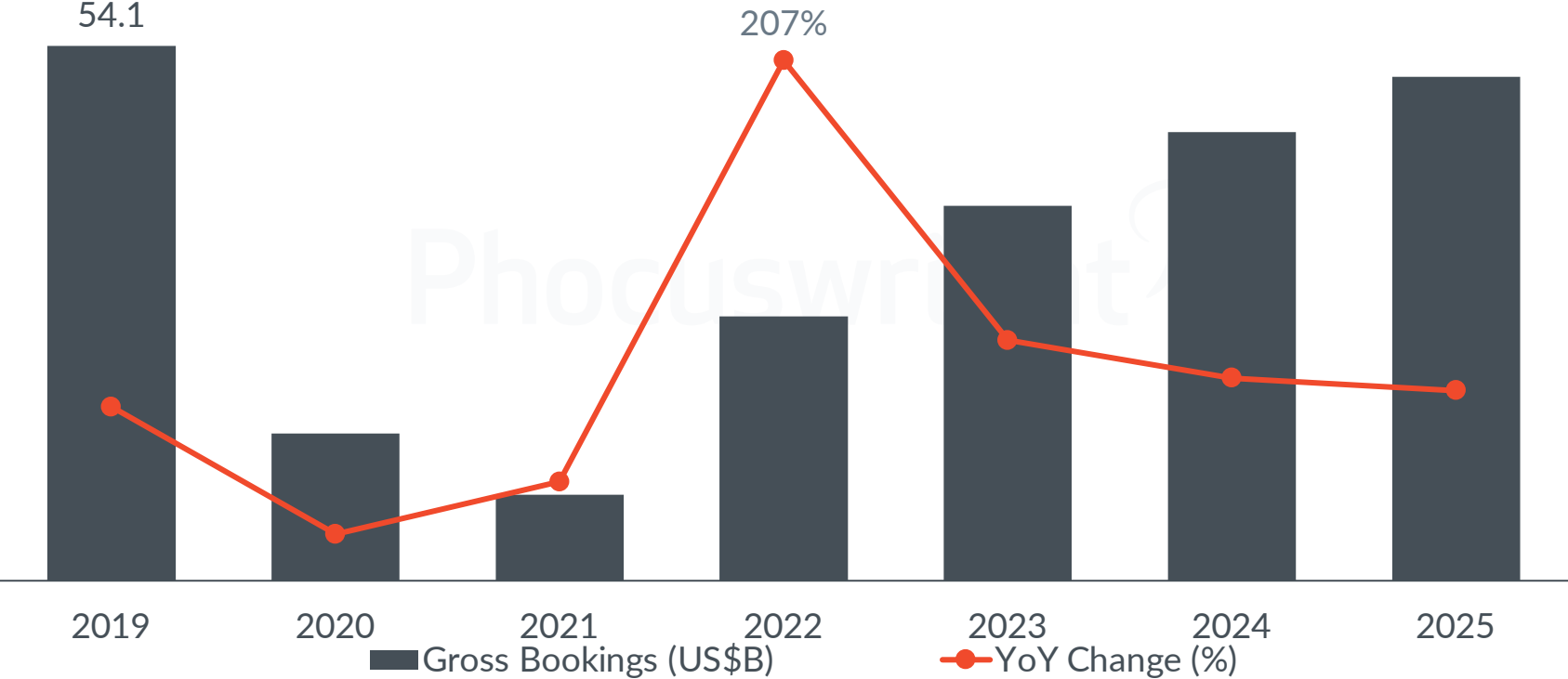


SPOTLIGHT

SOUTHEAST ASIA



Total Travel Gross Bookings (US\$B) and YoY Change (%), 2019-2025



Note: 2022-2025 projected. Annual change indexed to 2019.
Source: Phocuswright's Southeast Asia Travel Market Report 2021-2025



INTERNATIONAL TRAVEL RECOVERY

EXAMPLES IN ACTION

International Tourism: Rise of Global Middle Class

- The world's middle class grew from 507 million in 2000 to 2+ billion in 2022
- India's middle class grew from 14% to 31% of the whole population from 2005 to 2022
- Indonesia, the world's 4th most populous nation, has a middle class of 55 million out of the total population of 276 million
- More than 30% of households in Latin America are in the middle class (250 million)

*Source: [Credit Suisse Global Wealth Report 2022](#) & [Pew Research Institute](#)

SOLUTIONS FOR A DIGITALLY CONNECTED FUTURE

– McKinsey & Company

Reimagining the \$9 trillion tourism
economy—what will it take?

August 5, 2020 | Article

“ ...Overcome the digital gap within the sector and to level the playing field for SMEs. The Tourism Exchange Australia (TXA) platform, is an example of enabling at scale.

It acts as a matchmaker, connecting suppliers with distributors & intermediaries...[adding] to Australia’s destination attractiveness...”

Global Tourism Exchanges





#4

THE GENERATIONAL SHIFT IN EXPERIENCES

& WHAT IT MEANS
FOR TRIP PLANNING

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The Path to Purchase



Experiences come last

Transportation → Accommodation → Things to do



Experiences come last

Stays Flights Cars Packages Things to do Cruises

1 room, 2 travelers ▾


Going to

Check-in Dec 22

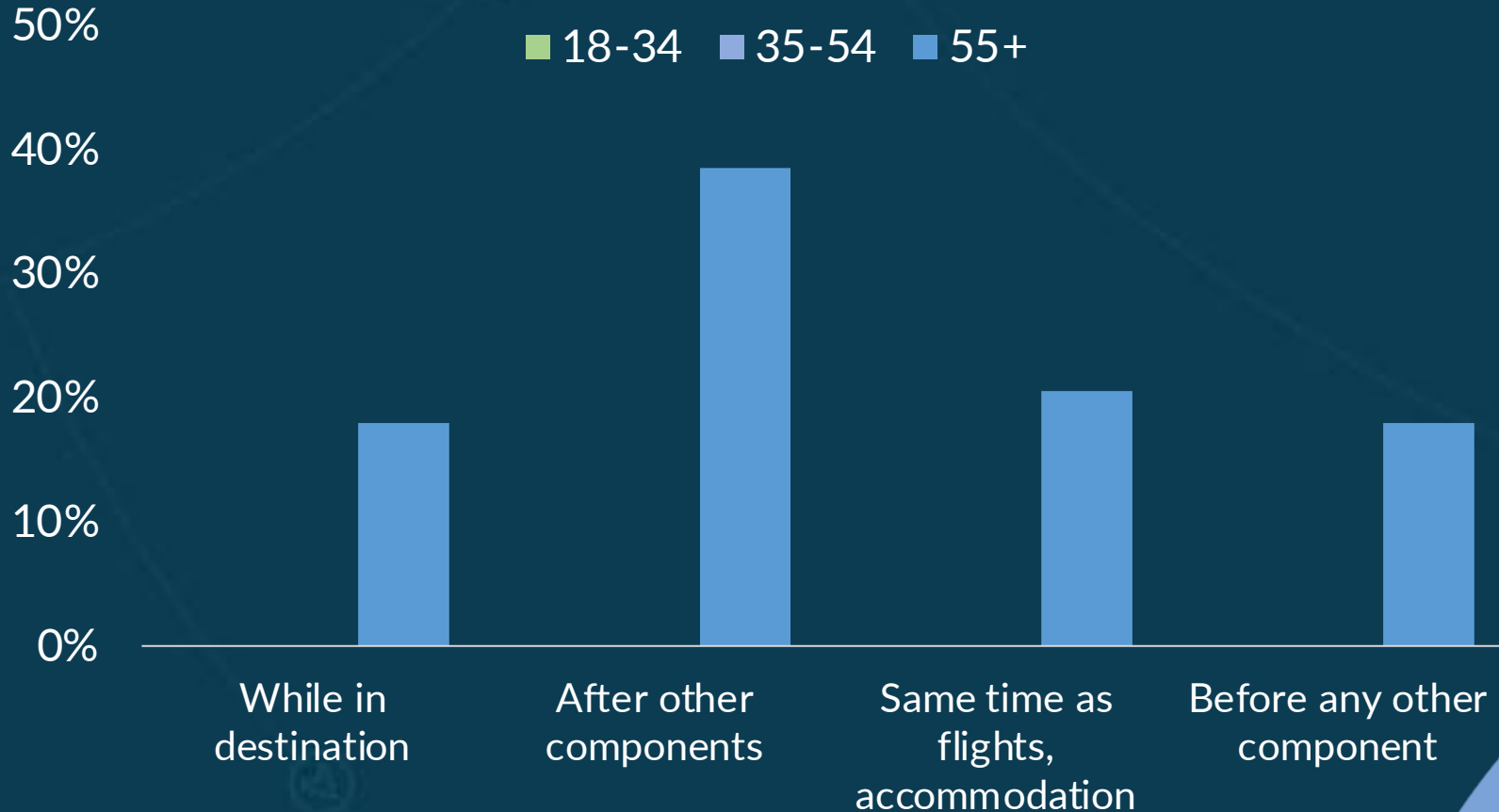
Check-out Dec 23

Add a flight Add a car

Search



When Booking – Tours (U.S.)



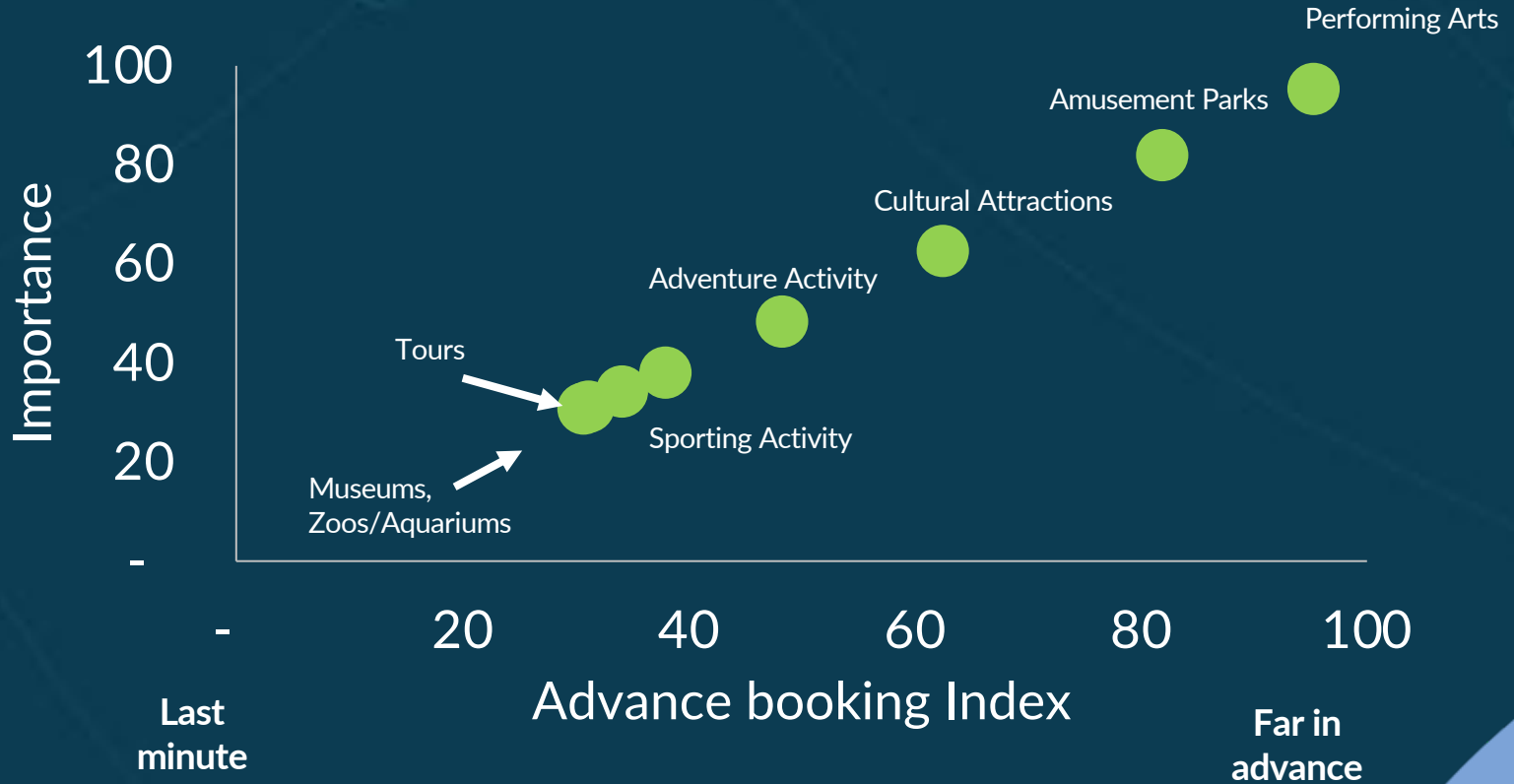
Change Underway...



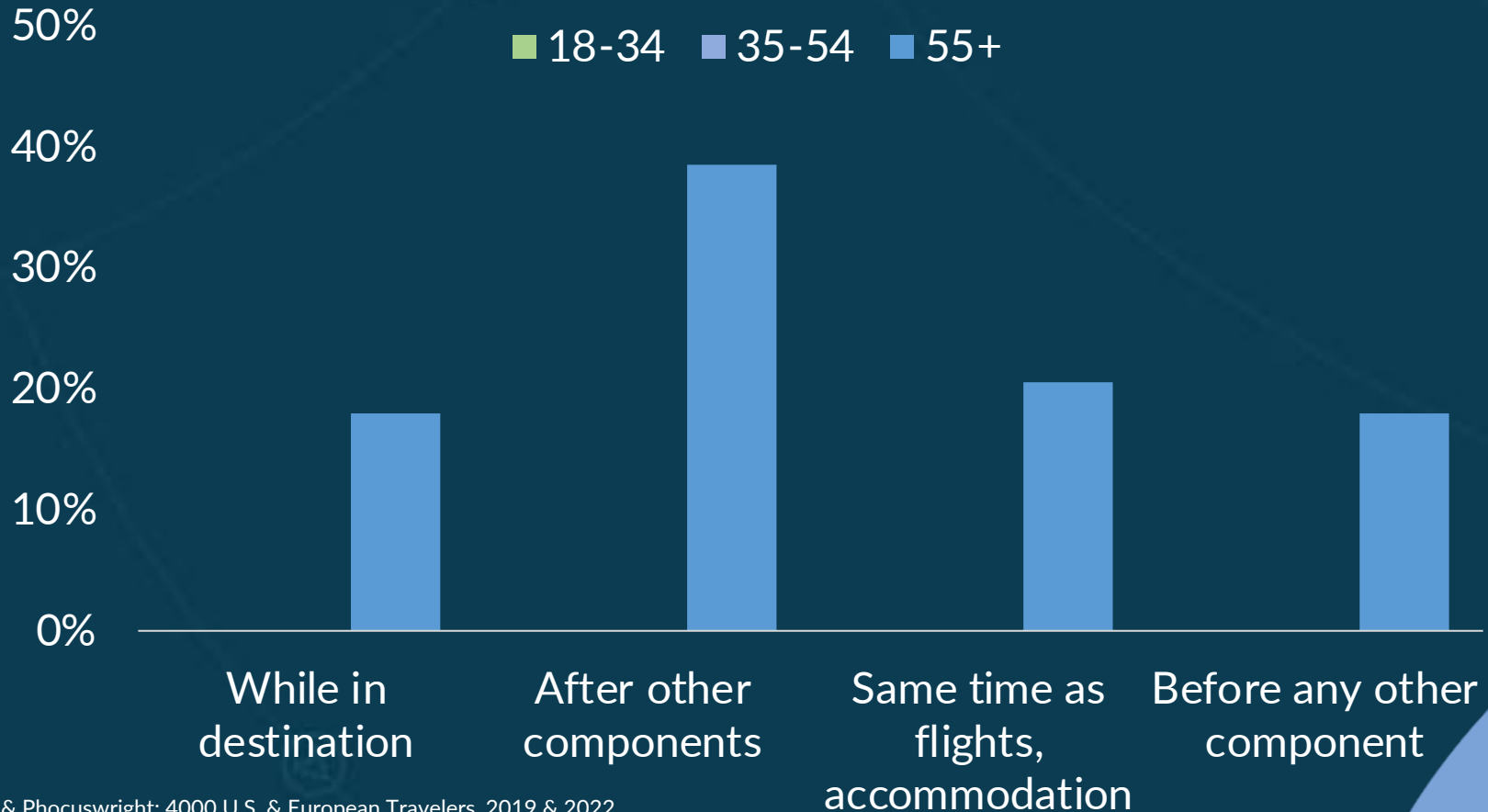
Importance vs. Advance Booking



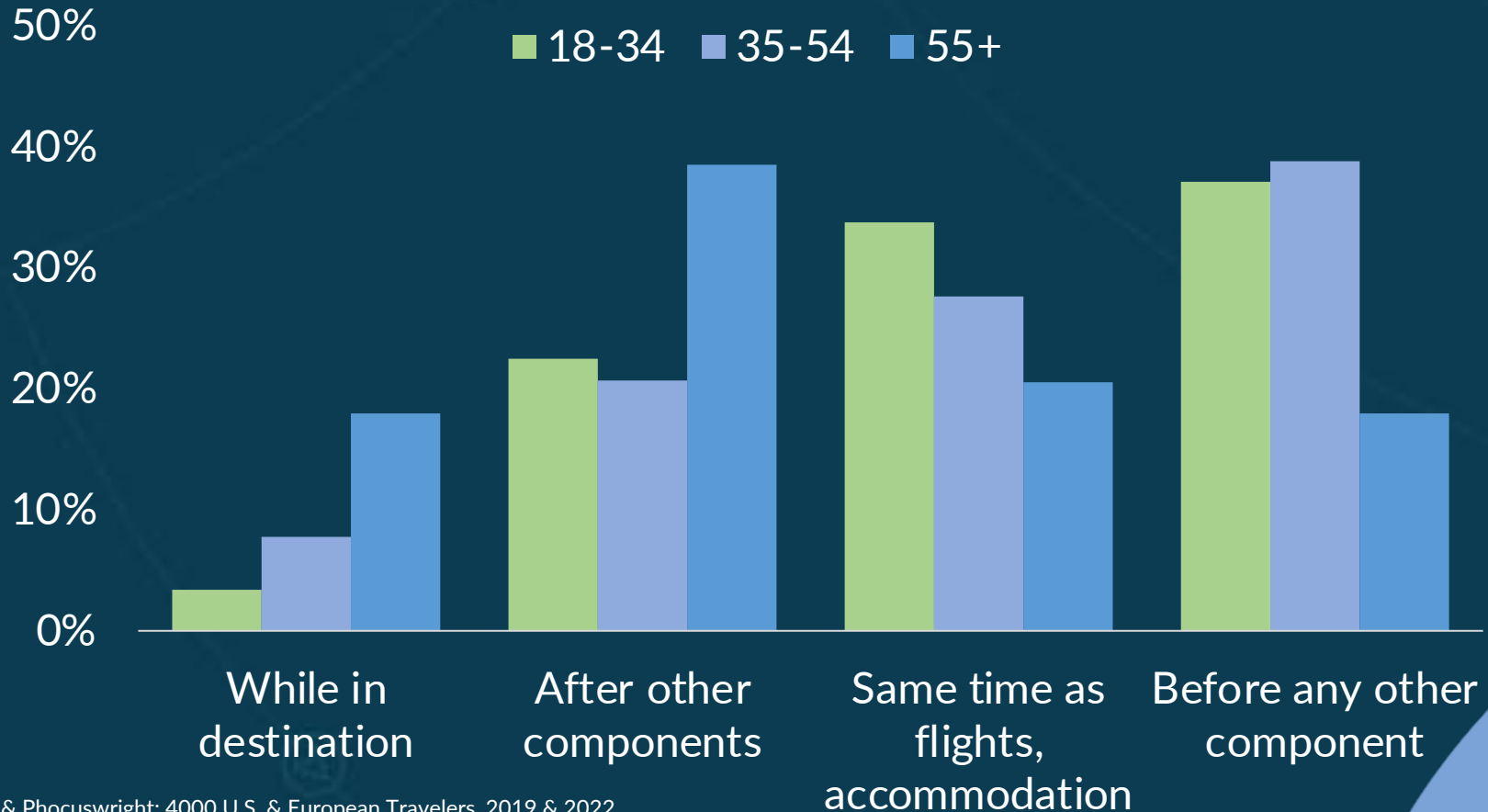
Importance vs. Advance Booking



When Booking – Tours (U.S.)



When Booking – Tours (U.S.)



1.

**“The tour happens to
be in Costa Rica”**



2.

Passions & Community



3.

Visual (video) Search

Amazon launches Inspire, a TikTok-like shopping feed that supports both photos and videos

Sarah Perez @sarahintampa / 12:28 PM EST • December 8, 2022

Comment

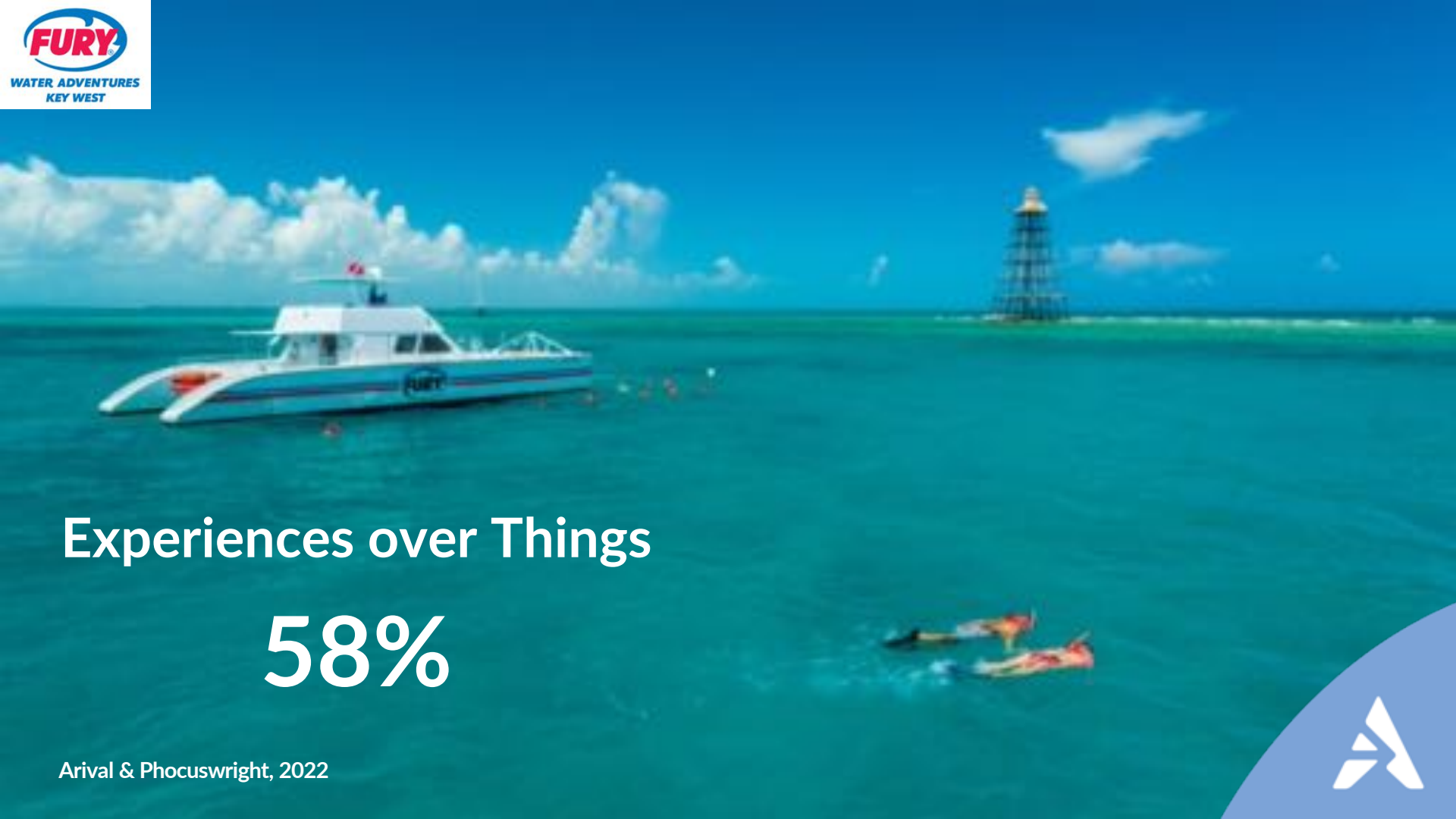


Amazon is bringing a TikTok-like shopping experience to its app. The company today announced the launch of **Inspire**, a new short-form video and photo feed that allows consumers to explore products and ideas and shop from content created





WATER ADVENTURES
KEY WEST



Experiences over Things

58%

Arival & Phocuswright, 2022



SHIFT IN EXPERIENCES

A person wearing a blue jacket, red pants, and a backpack is skiing down a snowy slope. The background features a line of evergreen trees under a soft, dim light, suggesting a sunset or sunrise. The overall scene is serene and active.

EXAMPLES IN ACTION

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Application Process

If your community has identified tourism as an economic development strategy, we invite you to apply to bring a tourism studio to your area. [LEARN MORE & APPLY](#)

[Home](#) + [Opportunities](#) + [Programs & Initiatives](#) + [Oregon Tourism Studies](#) + [Tourism Experience Studio](#)

Mountain biking Catamount Trail courtesy of Willamette Valley
Visitors Association

Tourism Experience Studio

What local experience do you want to create for others?

[Questions?](#)

[Reach out to our staff](#)

MULTICULTURAL TOURISM & DEVELOPMENT



STR guests value character in a property. Nearly nine out of 10 actively seek out properties with an interesting look and feel



Vacation rentals in remote locations can become destinations in themselves



An aerial photograph of the San Francisco Bay Bridge, showing its two main towers and the suspension cables. The bridge spans across the water, with the San Francisco city skyline visible in the background under a warm, golden sunset sky. The word "Resources" is overlaid in white text on the left side of the image, with a red underline.

Resources

WEBINAR RESOURCES



Research, slides and other resources will be sent by email and available at www.MilesPartnership.com/Phocuswright

North American Edition

TIME FOR

DMOCRACY

WEBINAR

Wednesday, January 25, 11am ET

milespartnership.com/time-for-democracy

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North America & South Pacific Lead

In association
with:

GROUP
NAO

and

C
coraggiogroup

Destination  Analysts

 GLOBAL
DESTINATION
SUSTAINABILITY
MOVEMENT

TCI Research
Tourism Competitive Intelligence



Every report,
chart and
data set.

One subscription
unlocks access for
your entire company.

Open Access for Destination Marketers:

[Phocuswright.com/Subscriptions/Open-Access-DMO](https://phocuswright.com/subscriptions/open-access-dmo)

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Questions



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