

# TRAVEL TRENDS

2023  
REPORT

THE  
POINTS  
GUY 



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## FOREWORD

To travel is to experience emotions, but over the past several years the travel industry has whipsawed in so many different directions, it can be hard to understand what “the new normal” is.

I’ll be honest, the level of change — whether in airline policies or travelers’ misbehavior in the sky — has shaken even the most hardened travelers like me to the core. It’s easy to make judgement on the state of travel from our own limited experiences, but at The Points Guy, we wanted to take a 30,000-foot snapshot on what actually is going on in travel.

Our team of experts rigorously follow the airline, hotel and cruise industries — with a focus the credit cards and loyalty programs tied to each — and have compiled this first-of-its-kind report showing the state of travel today and the trends to keep an eye on.

While Americans might have — finally — gotten the “pent-up” demand out of their systems, they continue to invest heavily in travel experiences. After all, “travel is the only expense that makes you richer,” so while it might be becoming more expensive (and at times exhausting), travelers are looking for ways to connect deeper and extract more value from every trip.

I hope you enjoy this special report, and I’m proud of our team who worked tirelessly to encapsulate where we are today.



**BRIAN KELLY**  
The Points Guy Founder





# WHERE TO GO

# DESTINATIONS TO WATCH IN 2023

📍 LAS VEGAS

📍 ORLANDO



## LAS VEGAS

There's always something new happening in Sin City. When the long-delayed Fontainebleau finally opens, it will welcome 3,700 new hotel rooms. There's a new casino off the Strip, a cannabis-friendly hotel and a handful of ambitious entertainment projects — including a “sphere” at The Venetian. And later this year, Formula One will turn Sin City into a racetrack in November, with cars zipping by its iconic attractions on a temporary track at more than 200 miles per hour.

## ORLANDO

There's more than theme parks here. Orlando has a gleaming new airport terminal to welcome more international travelers; will see its Brightline high-speed train connection to Miami completed, whisking visitors between the two cities in just three hours; and is home to the spectacular new Steinmetz Hall theater and concert venue. At the theme parks, there is the new Tron / Lightcycle Run ride at Disney's Magic Kingdom, and Universal Studios will welcome a new Minions-themed attraction and cafe.



# DESTINATIONS TO WATCH IN 2023

AOTEAROA NEW ZEALAND

## AOTEAROA NEW ZEALAND

The island nation used its prolonged closure to double down on sustainability efforts, connectivity initiatives and exceptional Maori cultural encounters. But Aotearoa New Zealand is welcoming back visitors with other high-appeal events and incentives, such as a spate of noteworthy new hotels. Aotearoa New Zealand will also co-host the largest FIFA Women’s World Cup ever along with Australia, and will also host the Women’s Rugby World Cup in 2023.



## JAPAN

After two years of closed borders, the Land of the Rising Sun reopened to international travelers late last year. They will be able to rediscover longstanding wonders along with exciting new hotels like the luxurious Roku Kyoto, part of Hilton’s LXR Collection, which opened during the pandemic, and new destinations like Azumi Setoda, a traditionally inspired inn set on a small island in Japan’s Inland Sea.



# DESTINATIONS ARE MAKING MAJOR INVESTMENTS IN TRAVEL AND TOURISM

Saudi Arabia plans to spend \$1 trillion on tourism infrastructure within the next decade – including major new airports, cruise hubs and resort developments along its coasts – with the goal of attracting more than 100 million travelers in the same period. It’s even opening its coastline to cruising for the first time with a new terminal at the Jeddah Islamic Port. The kingdom is also planning to add 500,000 hotel rooms, open an archeological attraction and launch a new airline, Riyadh Air, with the purchase of 39 new Boeing 787 Dreamliners, with the option for 33 more. This is one of the largest wide-body orders in Boeing’s history. However, a troubling human rights record, including ongoing restrictions on women and LGBTQIA+ individuals, plus the egregious treatment of journalists, are just a few of several major headwinds facing the kingdom’s plans.

The Philippines is also a destination to watch, if travel and tourism gross domestic product growth and employment are indications. Investment in this industry – which currently accounts for 1 in every 11 jobs in the world, the World Travel & Tourism Council reports – is a strong indicator of where travelers can expect to see massive infrastructure improvements (a new airport is underway in Manila, for example) and other developments that will make a destination more appealing and, critically, more accessible to travelers in the years to come.



SAUDI ARABIA



THE PHILIPPINES

# TRENDING DESTINATION: THEME PARKS

The ability to skip some lines at Walt Disney World keeps going up in price. Guests used to get free FastPass tickets. But those were replaced with Genie+ for \$15 per person per day. Then, in late 2022, Disney started setting the price based on demand. Some days shot up to \$29 per person – that’s \$116 for a family of four. And that’s in addition to the tickets just to enter the park.

And that’s just the beginning of the extra costs for a visit, as the parks try to make more money off each person who passes through the gate.



**BREAKFAST**  
**\$11.08**

Coffee and cinnamon roll at Gaston’s Tavern



**LUNCH**  
**\$14.58**



Chicken fingers and soft drink at Cosmic Ray’s

**SNACK**  
**\$5.99**



Mickey ice cream bar

**DINNER**  
**\$51.60**



Entree, soda and tip at Skipper Canteen

**COST FOR INDIVIDUAL LIGHTNING LANE RIDE**  
**\$10-\$25**

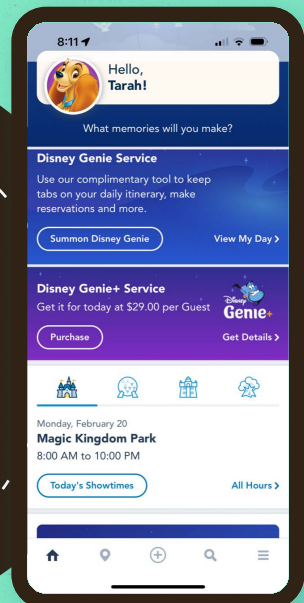
**GENIE+**  
**\$15-\$35**

\*Based on July 22, 2023, at Magic Kingdom

**TICKET**  
**\$159\***



**TOTAL:**  
**\$292.25**  
**FOR 1 PERSON**  
(using \$15 Genie+ and \$10 Lightning Lane)  
**FOR A FAMILY OF 4 THAT COULD EQUAL OVER**  
**\$1,000 PER DAY**  
not including airfare, lodging, etc.



Over at Universal Orlando, it may cost more or less to cut the line, depending on where you stay. Universal’s Express Pass costs more than Disney’s Genie+, but it is also “free” if you stay at the park’s highest tier of hotels, something that isn’t true at Disney World.

Ticket prices at Universal Orlando start at \$109 for access to one park, and go up to \$159.

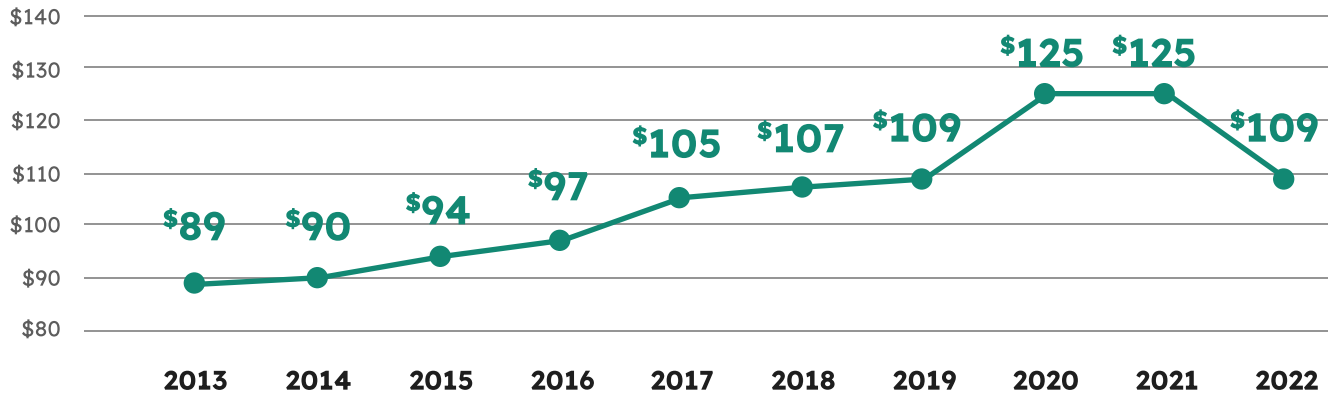
However, if you want a Universal Express Pass, know that it’s expensive, starting around \$100 per person and going up from there.



## DISNEY WORLD STARTING TICKET PRICES



\*prices vary on peak days and do not include Magic Kingdom entry fee.



### SIX FLAGS OVER TEXAS

- 🚩 \$54.99 ticket
- 🚗 \$36.95 parking
- ★ \$60-\$165 for a Flash Pass to reduce waiting in line (prices vary by date)

### DOLLYWOOD

- 🚩 \$89 ticket
- 🚗 \$22.80 parking
- ★ TimeSaver \$60-plus tax

## WHAT YOU PAY DEPENDS ON WHEN YOU GO

What we are seeing with theme parks are price increases that way outpace inflation for the busiest dates. As the parks look to more evenly spread out demand, the prices for the dates with the lowest demand aren't necessarily changing, but those school break dates are jumping in price.

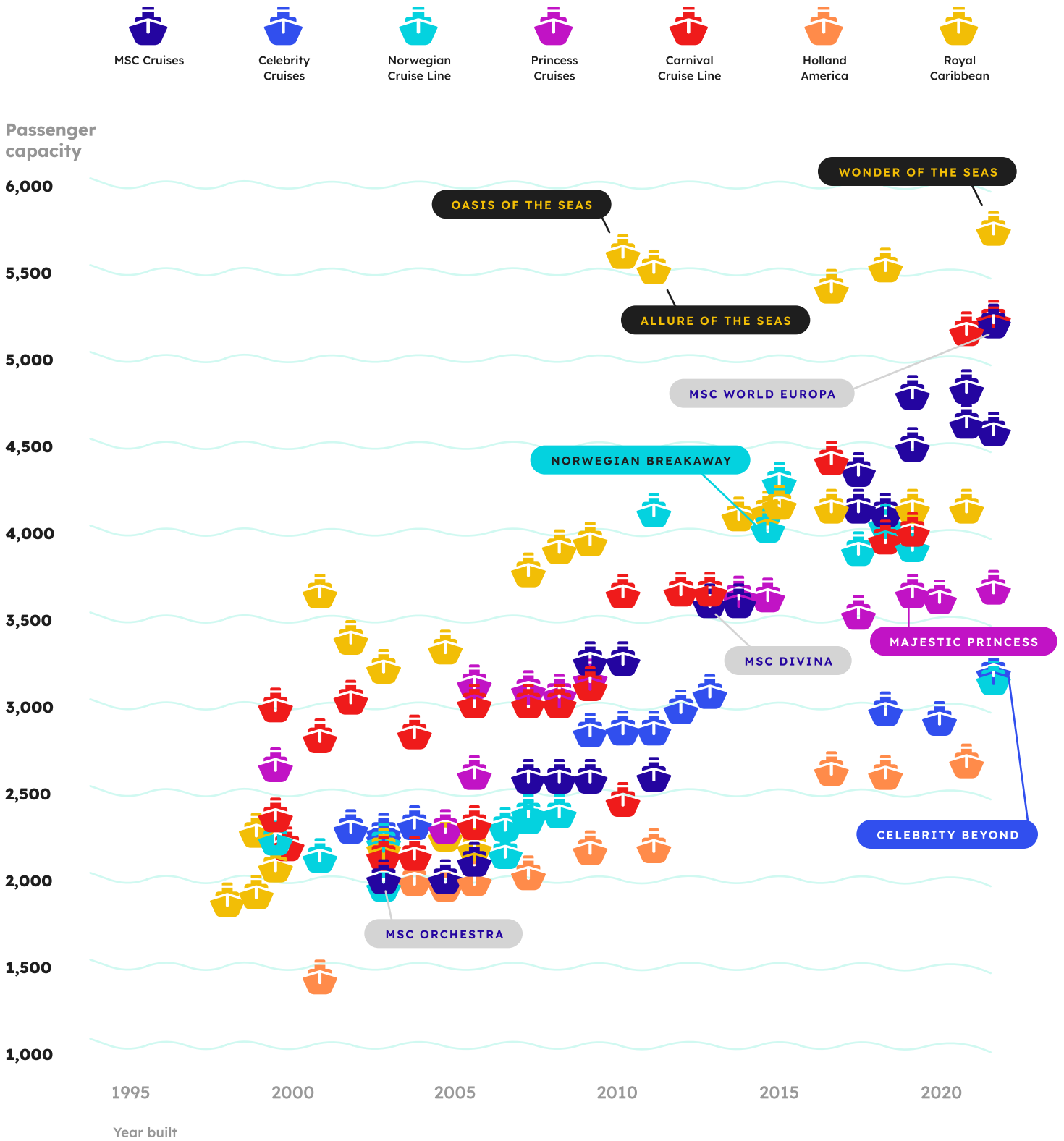
With Disney World specifically, prices in 2022 increased up to 20% for the most peak of park dates, from a max of \$159 to a new high of \$189.

## WHAT TO WATCH

- With Disney CEO Bob Iger back at the helm and growing public pressure over rising costs and the increasing number of fees, Disney World recently ended parking fees for its resort guests, after first instituting that fee in 2018. We'll be watching to see whether the high-water mark has been hit on increasing complexities and add-on fees for Disney.
- A rise in membership programs, similar to a Disney+ subscription providing discounts on Disney cruises and Disney resorts.

# CRUISES

## CRUISE SHIPS KEEP GETTING BIGGER



Luxury cruises remain the one area where small and intimate is still the goal

**6,800**   
PASSENGERS

The average capacity of the five biggest cruise ships currently at sea

**576**   
PASSENGERS

The average capacity of the five most notable new luxury ships

**12X** 

The size ratio between the biggest ships and the newest luxury ships

The largest ship at sea holds 6,800 passengers. Compare that to New York City’s largest hotel, the Marriott Marquis, with 1,971 rooms. The largest hotel in Las Vegas, the Venetian Resort, has 7,100 rooms.



## And luxury cruising is booming

Six new luxury cruise lines have just debuted or are on the way, including four tied to high-end hotel chains.

### NEW PLAYERS IN LUXURY CRUISING:

Line	Ships in service	Ships on order	First ship debut
Atlas Ocean Voyages	2	3	2021
The Ritz-Carlton Yacht Collection	1	2	2022
Explora Journeys	0	6	2023
Four Seasons Yachts	0	1	2025
Orient Express	0	2	2026
Aman Resorts	0	1	2026



## ONBOARD CHARGES AND FEES ON SHIPS ARE SOARING

The fees many cruise lines add to passenger bills for things like room service have been rising sharply since cruising resumed in earnest in early 2022. Cruise lines are looking for ways to increase revenue to pay down the enormous debt they took on during the COVID-19 pandemic. At a number of the biggest cruise brands, such fees are up 15% to 25% over the past year:

**Service fees (tips and gratuities)** are up 25% in a year at Norwegian Cruise Line, from \$20 to \$25 per person per day for passengers in most cabins.

**Restaurant fees** for onboard steakhouses are up 26% in a year at Carnival Cruise Line, from \$38 to \$48 per person.

**Premium drinks package fees** are up 58% in two years at Celebrity Cruises, from \$69 to \$109 per person per day.

**The fee of a four-device Wi-Fi plan** is up 167% in a year at Princess Cruises, from \$15 to \$40 a day.

**Room service delivery fees** are up 101% in a year at Celebrity Cruises, from \$4.95 to \$9.95 per order.



# WHERE TO STAY

# BRANDING BONANZA FOR HOTELS

Just when you thought there were too many brands in the hotel orbit, hotel companies began adding more soft brands. This is a type of affiliation that connects a hotel to the loyalty networks and reservations systems of a major hotel company like Hilton or Marriott, without having the standardized look of a hard brand like Westin or Waldorf Astoria.

The addition of soft brands came as hotel companies tried to fill in any blank spaces in their networks. They include The Luxury Collection and Autograph Collection for Marriott, MGallery for Accor, Unbound Collection and JdV for Hyatt and Curio Collection for Hilton.

Much of the brand explosion looks like a barbell: concentrating in the luxury sector at one end and the middle-market, mainstream sector at the other — with the narrow band between representing more legacy offerings like Sheraton, Hilton, Marriott and Hyatt Regency.

That means expect to see more luxury brands like Ritz-Carlton, Raffles and Park Hyatt as well as newer, more affordable middle-market options like Voco. Never heard of Voco? Well, IHG has opened 100 of the hotels in the past five years.

Hotel companies are also continuing to invest in vacation rentals. Airbnb, by far the leader in this space, added 900,000 new listings to its platform last year, bringing the total to 6.6 million. When Marriott launched Homes & Villas in 2019, it had just 2,000 listings; by the end of 2022 it had more than 80,000. Expect more brands to follow.

With 124 hotels at the end of 2022, The Luxury Collection is Marriott's largest luxury brand by property count — a fairly rapid ascent compared to Ritz-Carlton's current brand incarnation spanning 115 hotels that began in 1983, a decade prior to The Luxury Collection's launch in the 1990s.

## Number of brands under each hotel conglomerate over the years:

	2010	2015	2023
Hyatt	7	10	26
Hilton	10	12	19
Marriott	13	18	31*
IHG	7	12	18
Accor	10	10	40-plus

\*Marriott International is expected to close on an acquisition of its 31st brand, City Express, by the end of the second quarter of this year.



# HIGHER ROOM RATES AND A SHIFT TO FLUCTUATING POINT PRICING

## The era of deals is over

Hotels used to discount rates in order to fill every room possible. But that mindset is no longer the norm.

- Hotel rate discounts are a thing of the past in the name of protecting profits. Empty hotel rooms are fine as long as the guests you do have are paying market rate for a room, industry logic goes these days.
- Occupancy rates aren't back to pre-pandemic levels across the hotel industry (65.8% in 2019 versus 62.6% in 2022, according to STR) but overall performance recovered because rates are so much higher than before. Because of this, don't expect mass bargains to happen like they did in prior years.
- While discounts could sell out hotels immediately, there's no need to go to all that trouble and add in the expense of hiring more housekeepers to remedy all that wear and tear.

## Average daily rate increase by year:

	2019	2022	% change
Hyatt	\$238.00	\$267.00	12.2%
Hilton	\$144.79	\$151.01	4.3%
Marriott	\$160.55	\$172.85	7.7%
IHG	\$115.97	\$124.17	8.2%
Accor	\$98.30 (about 92 euros)	\$108.68 (about 103 euros)	10.6%

### Major hotel loyalty programs with published award charts

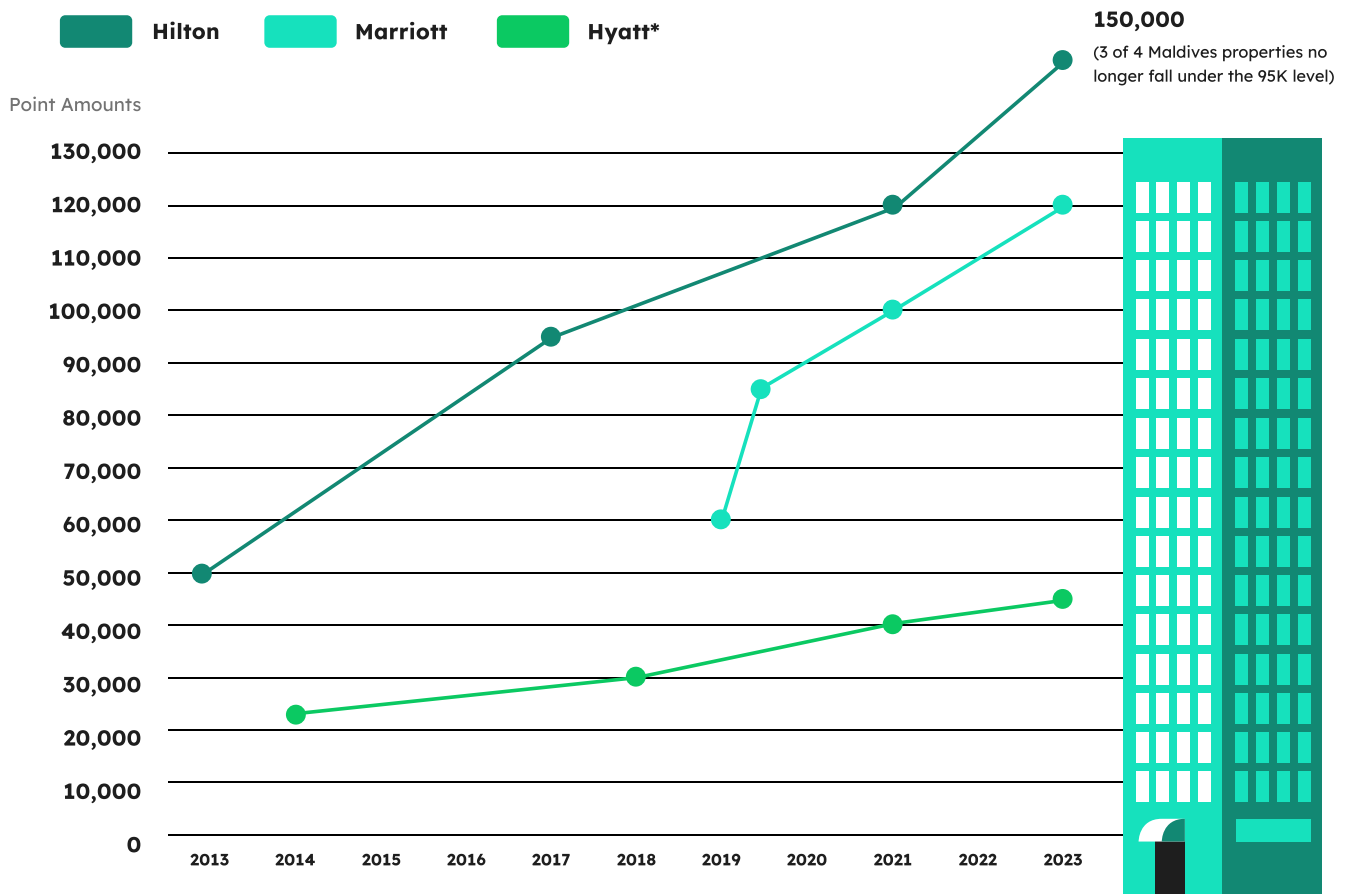
2015	2019	TODAY
Marriott	Marriott	Hyatt
Hilton	Hyatt	
IHG		
Hyatt		

### The changing cost of award stays

Hotels have shifted in the past few years from fixed award charts to dynamic prices that are closely tied to the cash room rates.



## MORE POINTS ARE NEEDED FOR THE TOP LUXURY HOTELS



\*Notably the only one of these three that still publishes this upper bound



# ALL-IN ON ALL-INCLUSIVE RESORTS

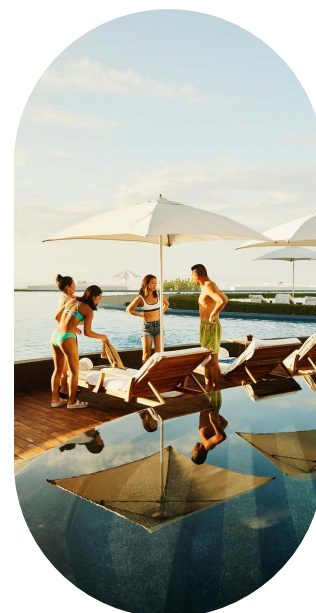
- Once snubbed for mediocre food, watered-down drinks and less-than-glamorous rooms and amenities, all-inclusives are a new focus for major hotel companies like Hyatt, Marriott and Hilton, among others, who are doubling down on the know-what-you-get-upfront vacation type. In the last four years, the three conglomerates have gone from nearly 30 all-inclusive resorts to over 150, plus nearly two dozen in the pipeline.
- Though Marriott started 2019 with just one all-inclusive resort, its portfolio currently has over 30, plus nearly a dozen in the pipeline. It's also leading the trend in bringing the format to its well-known luxury brands, with plans to open all-inclusive outposts of W, Ritz-Carlton and JW Marriott resorts, along with the recent opening of the first Luxury Collection all-inclusive resort.



Hyatt is leading the pack of all-inclusive growth, going from fewer than 10 resorts in 2019 to over 120 as of this year, plus another 10 in the pipeline.

# NO HIDDEN FEES HERE

- Travelers hate pesky — and often hidden — resort fees that can easily tack on \$25 to \$50 per night. But they love all-inclusive resorts for the (mostly) all-in pricing without resort fees, which can easily save \$150 on a weeklong vacation. But will this shift in consumer trends mean resorts will follow with additional fees for all-inclusive resorts?
- Not every all-inclusive resort falls into the typical beach experience. Expect to see growth in nontraditional all-inclusive experiences, like Hyatt's wellness- and spa-focused Miraval brand.





# HOW TO GET THERE

# NONTRADITIONAL AIRLINES ARE GROWING

## Number of cities served

Airline	Jan. 22	Jan. 23
Avelo	19	33
Breeze	16	29
Spirit	81	89
Sun Country	46	47
Allegiant	128	124
Frontier	108	93

Source: Cirium

The last two decades have been filled with airline mergers, leaving passengers to mostly pick among the “Big Four” carriers — American Airlines, Delta Air Lines, United Airlines and Southwest Airlines — that account for 75% of the U.S. market.

But that is starting to change. Travelers today are finding a slew of refreshing new options with airlines that don’t force them to connect in giant hubs.

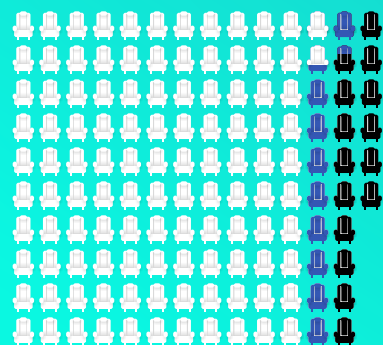
Two new budget airlines — Avelo and Breeze — are ones to watch. Both launched in 2021 but have rapidly grown since — already doubling their number of destinations. They are joined by the relatively new “semi-private” carrier JSX.

Yes, they are tiny compared to the overall industry, but they fill a vacuum created by the big airlines: flying nonstop to “underserved” markets — routes like Providence-Cincinnati, Louisville-San Francisco and Chicago-New Haven, Connecticut. The airlines are also known for offering rock-bottom base fares — which, even with the add-on fees being charged, helps put downward pressure on fares.

# PLANES ARE GETTING BIGGER

It’s not your imagination: There may be more people on your plane now than a decade ago. Planes flying U.S. passengers have been trending larger; there are fewer small regional jets and a general “upgauging” of planes to higher-capacity versions of popular jets in the Boeing 737 and Airbus A320 families of aircraft.

## AVERAGE SEATS PER AIRCRAFT



2015 - 111.8

2019 - 121.3

2023 - 136.0

Seats per departure on flights from U.S. airports.  
Source: Cirium



## Regional jets are flying less

The latest versions of the Boeing 737 and Airbus A320 families to come off assembly plant lines are longer than previous models, with more rows of seats. Even the smallest planes in their fleets — so-called regional jets — are getting bigger. The regional carriers that fly feeder flights for their big partners American, Delta and United have also been “upgauging” — or replacing their smallest regional jets with bigger ones.

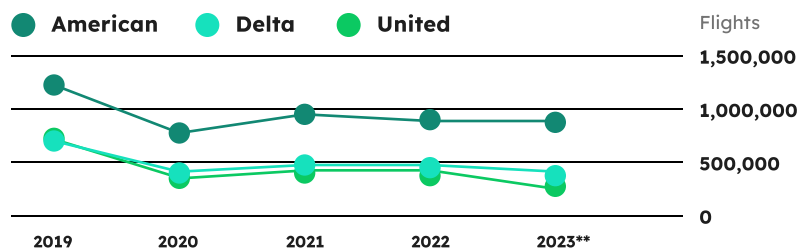
One of the most pronounced changes has been a decline in the number of flights operated by regional jets. Airlines are now operating a smaller percentage of flights as airlines move more flights to bigger regional aircraft. Some of the smallest, least-popular regional jets are becoming especially scarce. The cramped cabin of the 50-seat CRJ200, for example, is flying for few carriers these days. Delta, where the jet was once a staple of its regional Delta Connection fleet, intends to phase out the plane altogether by year’s end. The cramped cabin of 50-seat CRJ200, for example, is flying for few carriers these days. Delta, where the jet was once a staple of its regional Delta Connection fleet, intends to phase out the plane altogether by year’s end.

This does mean that smaller cities are losing flight frequencies or being dropped completely from the route map.

### SCHEDULED REGIONAL JET FLIGHTS\* PER YEAR BY THE U.S. ‘BIG 3’

\*Counts smaller jets typically operating with fewer than 100 seats that operate flights under the regional brands of American, Delta and United. \*\*Includes flights currently published on airline schedules through the end of 2023.

Source: OAG



## INFLIGHT WI-FI IS GETTING CHEAPER

U.S. airlines are moving in the direction of making Wi-Fi cheaper — if not completely free.

In February, Delta began offering free Wi-Fi on its planes equipped by Viasat — a move that covers most of its domestic mainline flights. In doing so, Delta jumped closer to JetBlue in offering customers complimentary Wi-Fi on all flights.

That development comes as most U.S. airlines have worked to add faster Wi-Fi to their planes. While that gives passengers something to look forward to in years ahead, here’s how Wi-Fi in the skies stacks up across different airlines. And note that not everyone is feeling the peer pressure. Three U.S. budget airlines — Allegiant, Sun Country and Frontier — currently don’t offer any inflight Wi-Fi service and aren’t expected to do so any time soon.

### Percent of mainline\* fleet with Wi-Fi



- 100% American
- 100% JetBlue
- 100% Southwest
- 100% Alaska
- 100% United



- 98.7% Delta will be 100% by May
- >80% Spirit



- 0% Allegiant
- 0% Sun Country
- 0% Frontier
- 0% Hawaiian\*\*

\*Connectivity varies on regional jet fleets

\*\*Free Wi-Fi rollout begins this year on select planes

### Price of domestic Wi-Fi

(for a single device)

#### DELTA

Free on Viasat-equipped planes, begins at \$6 on Intelsat-equipped planes

#### JETBLUE

Free

#### UNITED

Begins at \$8 or 1,600 miles for MileagePlus members; \$10 for everyone else

#### SPIRIT

Browsing starts at \$2.99 and streaming starts at \$5.99

#### AMERICAN

Begins at \$9

#### SOUTHWEST

Begins at \$8 per leg

#### ALASKA

Begins at \$8

#### ALLEGIAN / FRONTIER / HAWAIIAN / SUN COUNTRY

N/A

# THERE ARE NO LONGER SET PRICES FOR AWARD TICKETS

Just like with hotel loyalty programs, the airline industry has shifted primarily to dynamic award pricing and increased price ranges.

## Major US airlines with published award charts

2015	2019	TODAY
Delta	American	American*
American	United	Alaska**
United	Alaska	
Alaska		

\*American will be removing published charts in the first quarter of 2023.

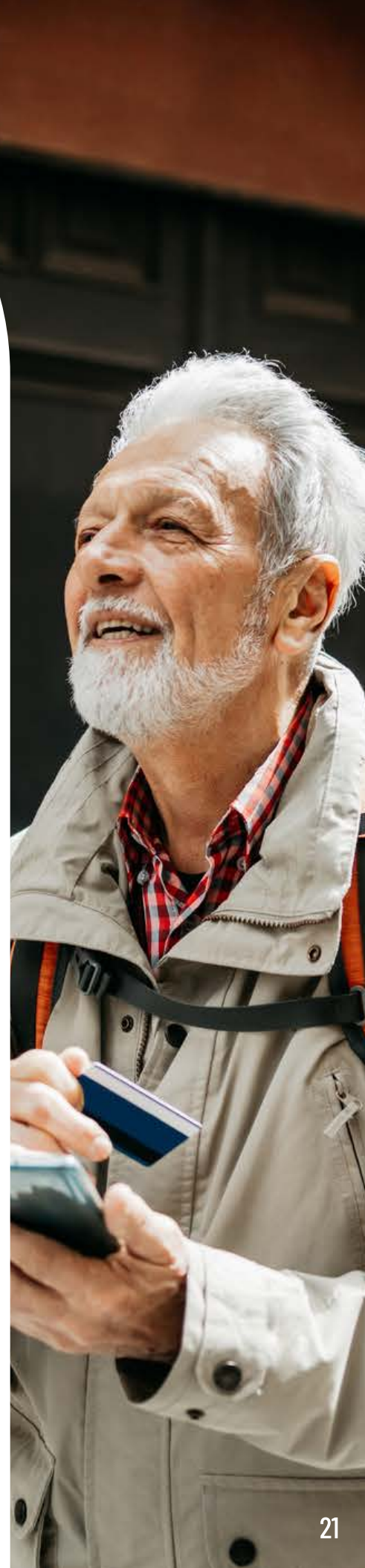
\*\*Alaska's award charts remain published but use the language "starting from" for award rates.

# REDEFINING AIRLINE LOYALTY AND ELITE STATUS

In the years following the Great Recession of 2008, loyalty programs generally awarded status (and requisite perks) based on miles flown or nights spent. Now, the paradigm has shifted to reward spending and holders of cobranded credit cards.

- Delta requires a certain amount of flying and spending to reach its elite Medallion status — though you can remove the revenue requirement via high spending on a Delta credit card.
- United allows elite status qualification based solely on spending.
- American went even further with Loyalty Points, a new elite-status system it unveiled in 2021, awarding credit toward elite status for virtually every base mile earned across the entire program, including credit card spending and other partner activity, not just flying.

In perhaps the most significant example of prioritizing credit card membership over customer loyalty, Delta implemented new Sky Club access policies in February, restricting elite members traveling internationally from once-free access to now requiring a membership or the right credit card. Gold, Platinum and Diamond members now must have a club membership, hold an eligible (premium) credit card, or be confirmed in premium economy (or higher) on long-haul flights to get in.



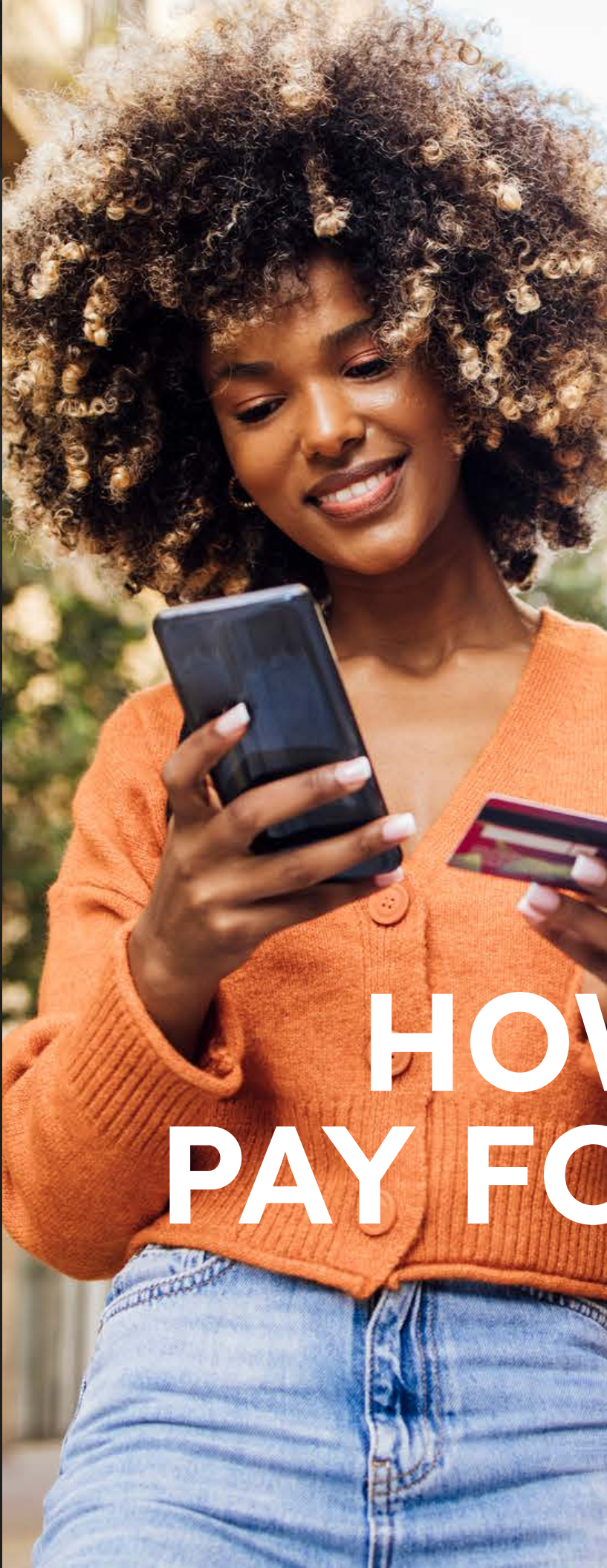
# FAMILY TRAVEL: STATUS OF SEATING AND BOARDING POLICIES

Over the past decade, airlines have reserved more and more seats for elite members or those willing to pay to be closer to the front of the plane. That's often meant that families have had to pay up or be split up. But this is now changing.

- United Airlines recently rolled out a really flexible new set of policies around family seating, even allowing families to switch flights if they aren't able to be seated together.
- Southwest Airlines has also loosened its rules, allowing children up to age 13 to preboard so families could sit together, since Southwest doesn't offer assigned seating.
- Delta Air Lines also rolled out a family seating plan in early 2023, which is a small step in the right direction.
- American Airlines' freshly amended customer service plan now reads: "We guarantee children 14 and under will be seated adjacent to an accompanying adult at no additional cost, including Basic Economy fares."

TPG's push to other airlines is to make it a priority for families to sit together, for the sake of all passengers on board. It's better when children can be with their parents. Hopefully, this is a trend we'll see gain momentum over the rest of 2023.





# HOW TO PAY FOR IT

# CREDIT CARDS SHIFT TO LIFESTYLE PERKS

In recent years, credit card issuers have added lifestyle perks beyond the traditional travel-related benefits. These new benefits help offset the significant – and climbing – annual fees, but are not always easy to use or the right fit for all members.

- The combination of monthly, quarterly and annual statement credits on The Platinum Card® from American Express promise more than \$1,500 in annual value, but the mix is very odd: Airline fee credits, streaming services, Walmart+ membership and high-end fitness clubs are just a few of the statement credit hodgepodge. Plus, these require consistent attention to use and maximize.
- The Chase Sapphire Reserve has followed suit with credits for food delivery, ride-hailing services and exercise brands, promising hundreds of dollars in annual statement credits doled out in monthly allowances that are difficult to fully utilize.
- The Marriott Bonvoy Brilliant® American Express® Card removed its \$300 annual Marriott credit and replaced it with monthly dining credits.

# PREMIUM CARDS, HIGHER FEES

Banks have significantly raised the annual fees on their most-prestigious cards, created a new tier of cards with \$200-plus annual fees and stripped benefits from their no-annual-fee cards. While credit cards can unlock more benefits than ever before, those added perks come at a cost.

The Chase Sapphire Reserve's annual fee increased from **\$450** to **\$550** in 2021.

The annual fee on The Platinum Card® from American Express jumped from **\$450 to \$550** in 2017 and then to **\$695** in 2021.

The Marriott Bonvoy Brilliant® American Express® Card updated its benefits in 2022 to offer higher elite status and a more valuable free night award, then increased its annual fee from **\$450 to \$650**.

Other cards kept their annual fees the same but slashed benefits, such as the U.S. Bank Altitude Reserve Visa Infinite® Card, UBS Visa Infinite Credit Card and City National Crystal Visa Infinite Credit Card.

New credit cards with a mid-tier annual fee of \$250 have been introduced: the Marriott Bonvoy Bountiful Card (new in 2022), Marriott Bonvoy Bevy™ American Express® Card (new in 2022) and United Quest Card (new in 2021).





# ACKNOWLEDGMENTS

This is one of the most exciting times to travel, with profound shifts happening across the industry.

Multiple teams at The Points Guy worked together to make this first-of-its-kind travel trends report a reality.

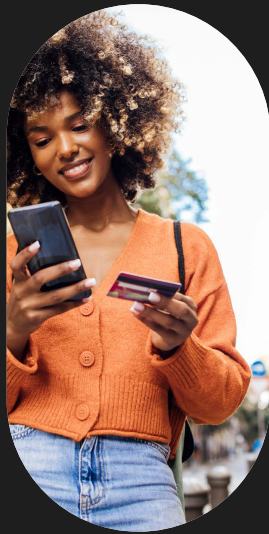
Our industry experts across the editorial team collaborated data from different destinations, hotels, cruises, airlines, credit card issuers and loyalty programs to bring you these insights. Special thanks go to Nick Ewen, Eric Rosen, Summer Hull, Melanie Lieberman, Ben Mutzabaugh, Madison Blancaflor, Matt Moffitt, Andrew Kunesh, Gene Sloan, Tanner Saunders, Cameron Sperance, Katie Genter, Zach Griff, David Slotnick, Ryan Smith, Becky Blaine, Caroline Lascom, Senitra Horbrook, Emily Thompson, Christine Gallipeau and Treena Simington, all of whom played a part writing or editing the report.

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**SCOTT MAYEROWITZ**  
TPG Executive Editor





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