

The State of the Industry

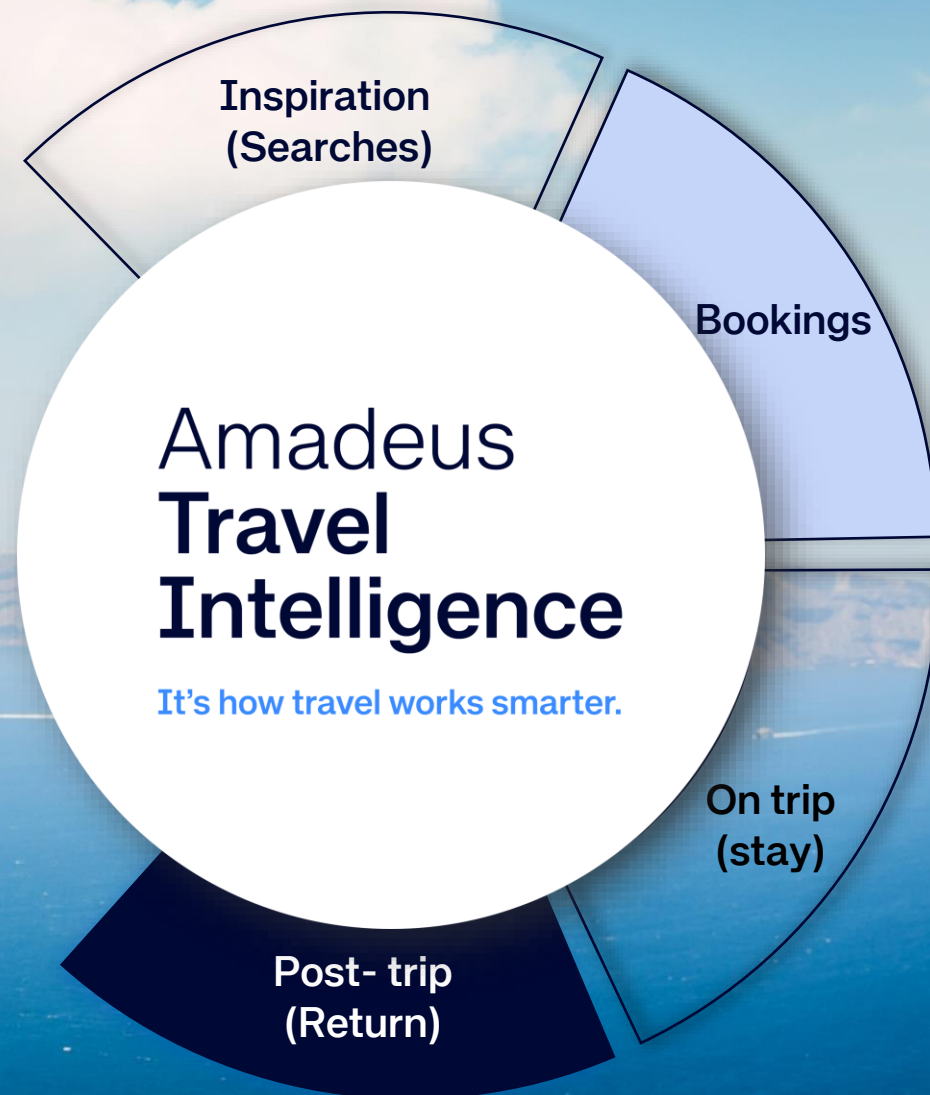
Understanding key trends in uncertain times

North America



Understand the entire Traveler Journey

Data-driven insights that fuel the travel ecosystem



Identify patterns and trends that indicate past and forward-looking travelers' behavior



Traveler socio demographic

- Age
- Gender
- Nationality

Air searches and air fares

- Search volume
- Top origin markets
- Booking window

Air bookings and hotel demand

- Preferred Travel Dates
- Trip duration
- Lead time
- Air spending
- Booking channels

Traffic and schedule

- Route availability
- Direct vs. indirect flights
- Travel time/convenience
- Passenger volume
- Flight capacity

Hotel occupancy and length of stay

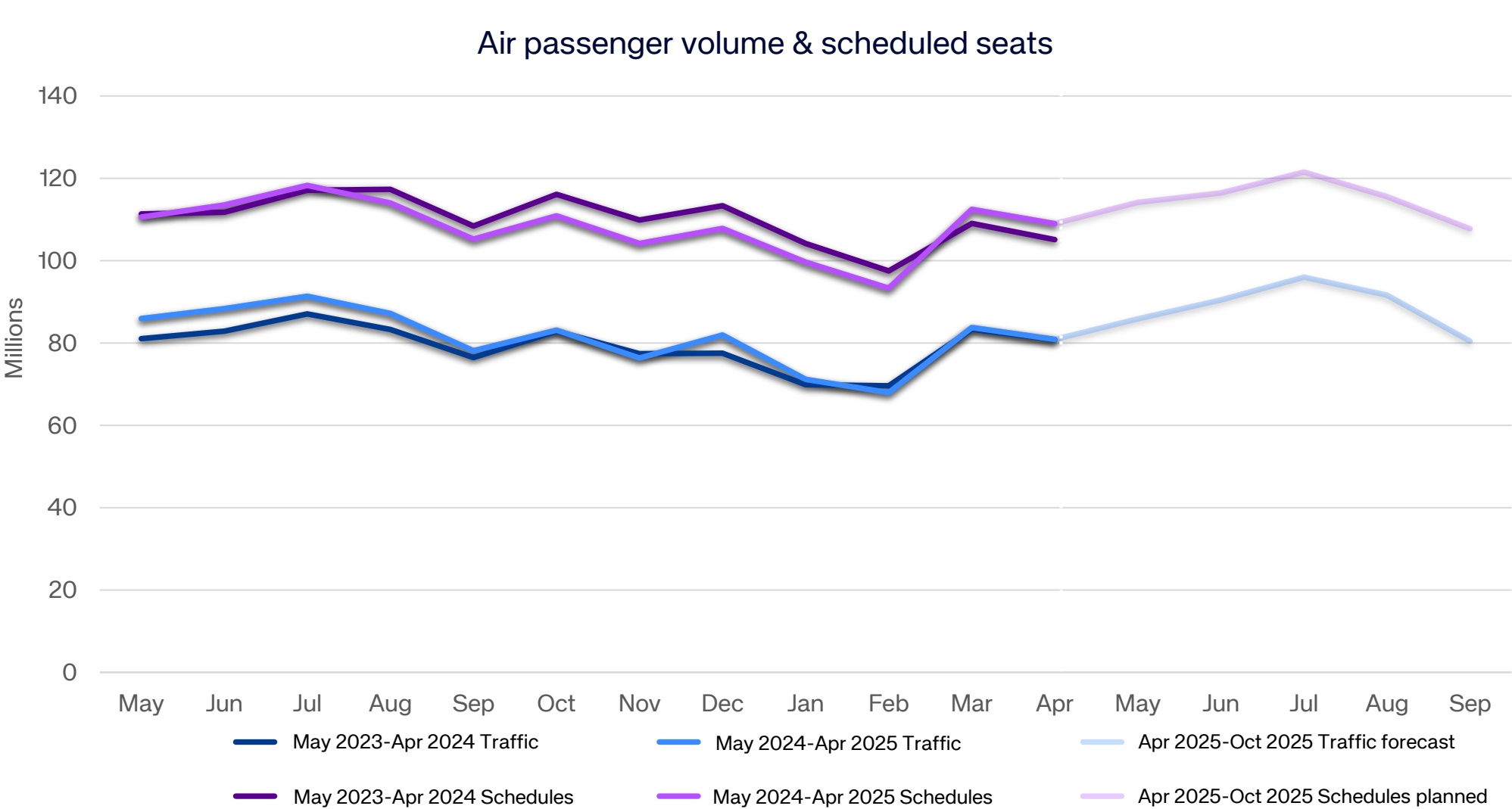
- Occupancy rates
- RevPAR
- Lead time
- Hotel booking spending

Travel Market Overview - United States



Airflow Overview

Worldwide to United States: Passenger traffic and Capacity analysis



Understand better my market and detect if new trends



2.5% growth

Passenger traffic YoY

Travel Change YoY	2022 vs 2021	2023 vs 2022	2024 vs 2023	2025 vs 2024 YTD.
United States to United States (domestic)	24.3%	9.1%	3.6%	-0.2%
From Canada to United States	-	36.3%	10.4%	-1.0%
From Europe to United States	-	23.7%	7.2%	2.5%

Passenger traffic YoY

Travel Change YoY	2022 vs 2021	2023 vs 2022	2024 vs 2023	2025 vs 2024 YTD.
United States to United States (domestic)	24.3%	9.1%	3.6%	-0.2%
From Canada to United States	-	36.3%	10.4%	-1.0%
From Europe to United States	-	23.7%	7.2%	2.5%



Worldwide Travel patterns: Reality vs. aspirations

Top 10 searched markets

Destinations	May.23-Apr.24 ranking	May.24-Apr.25 ranking
United States	1	1
India	3	2
China	6	3
Spain	2	4
Japan	7	5
United Kingdom	4	6
Italy	5	7
Thailand	10	8
Brazil	8	9
Canada	11	10

Top 10 destinations receiving passengers

Destinations	May.23-Apr.24 ranking	May.24-Apr.25 ranking	May.24-Apr.25 vs May.23-Apr.24
United States	1	1	-3%
India	2	2	5%
China	9	3	44%
Japan	6	4	18%
Spain	3	5	0%
Thailand	10	6	10%
Australia	4	7	-5%
Saudi Arabia	7	8	2%
Canada	5	9	-8%
United Kingdom	8	10	-9%
Total	49.3%	49.9%	

Travel patterns of the Americans: Reality vs. aspirations

Top 10 destinations searched from United States

Destinations	May.23-Apr.24 ranking	May.24-Apr.25 ranking
United States	1	1
Mexico	2	2
India	3	3
Canada	5	4
United Kingdom	4	5
Japan	8	6
China	7	7
Italy	6	8
France	9	9
Spain	10	10

Top 10 destinations receiving passengers from United States

Destinations	May.23-Apr.24 ranking	May.24-Apr.25 ranking	May.24-Apr.25 vs May.23-Apr.24
United States	1	1	-3%
Mexico	2	2	-3%
Canada	3	3	1%
India	4	4	-2%
United Kingdom	6	5	-2%
Italy	5	6	-6%
Dominican Republic	7	7	-1%
Puerto Rico	10	8	7%
France	9	9	0%
Philippines	8	10	-4%
Total	82.3%	82.4%	

Travel patterns of the Americans: Reality vs. aspirations*

Top 10 destinations searched from United States

Destination cities	May.23-Apr.24 ranking	May.24-Apr.25 ranking
New York	1	1
Orlando	2	2
Las Vegas	3	3
Los Angeles	4	4
Chicago	5	5
Ft Lauderd.	7	6
Miami	6	7
Atlanta	8	8
Dallas	12	9
San Franci.	10	10

Top 10 destinations receiving passengers from United States

Destination cities	May.23-Apr.24 ranking	May.24-Apr.25 ranking	May.24-Apr.25 vs May.23-Apr.24
New York	1	1	-4%
Los Angeles	2	2	-5%
Chicago	3	3	-4%
Orlando	4	4	-3%
Las Vegas	5	5	-3%
Seattle	6	6	-3%
Dallas	8	7	1%
Atlanta	7	8	-1%
Boston	10	9	0%
San Franci.	9	10	-5%
Total	39.6%	39.6%	

* Domestic flights only

Where do United States visitors come from? Reality vs. aspirations

Top 10 markets searched to United States

Markets	May.23-Apr.24 ranking	May.24-Apr.25 ranking
United Sta.	1	1
Canada	2	2
United Kin.	3	3
China	12	4
Mexico	5	5
India	4	6
Brazil	6	7
Germany	7	8
Japan	11	9
Italy	8	10

Top 10 markets receiving passengers to United States

Markets	May.23-Apr.24 ranking	May.24-Apr.25 ranking	May.24-Apr.25 vs May.23-Apr.24
United Sta.	1	1	-3%
Canada	2	2	-2%
United Kin.	3	3	-5%
Mexico	4	4	-4%
India	5	5	-4%
Italy	6	6	-3%
South Korea	8	7	-2%
Japan	9	8	10%
Germany	7	9	-11%
Brazil	10	10	-14%
Total	86.1%	86.2%	

Where do United States visitors come from? Reality vs. aspirations

Top 10 markets searched to United States

Markets	Jan.24-Apr.24 ranking	Jan.25-Apr.25 ranking
United Sta.	1	1
Canada	2	2
Mexico	5	3
China	8	4
India	3	5
Brazil	4	6
United Kin.	6	7
Japan	9	8
South Korea	13	9
Colombia	11	10

Top 10 markets receiving passengers to United States

Markets	Jan.24-Apr.24 ranking	Jan.25-Apr.25 ranking	Jan.25-Apr.25 vs Jan.24-Apr.24
United Sta.	1	1	0%
Canada	2	2	0%
Mexico	4	3	-25%
United Kin.	3	4	33%
India	5	5	0%
South Korea	6	6	0%
Japan	8	7	-13%
Italy	10	8	-20%
Germany	7	9	29%
Brazil	9	10	11%

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Where do United States visitors come from? Reality vs. aspirations*

Top 10 markets searched to United States

Markets	May.23-Apr.24 ranking	May.24-Apr.25 ranking
Canada	1	1
United Kin.	2	2
China	11	3
Mexico	4	4
India	3	5
Brazil	5	6
Germany	6	7
Japan	10	8
Italy	7	9
France	8	10

Top 10 markets receiving passengers to United States

Markets	May.23-Apr.24 ranking	May.24-Apr.25 ranking	May.24-Apr.25 vs May.23-Apr.24
Canada	1	1	-2%
United Kin.	2	2	-5%
Mexico	3	3	-4%
India	4	4	-4%
Italy	5	5	-3%
South Korea	7	6	-2%
Japan	8	7	10%
Germany	6	8	-11%
Brazil	9	9	-14%
France	10	10	-8%
Total	50.3%	50.4%	

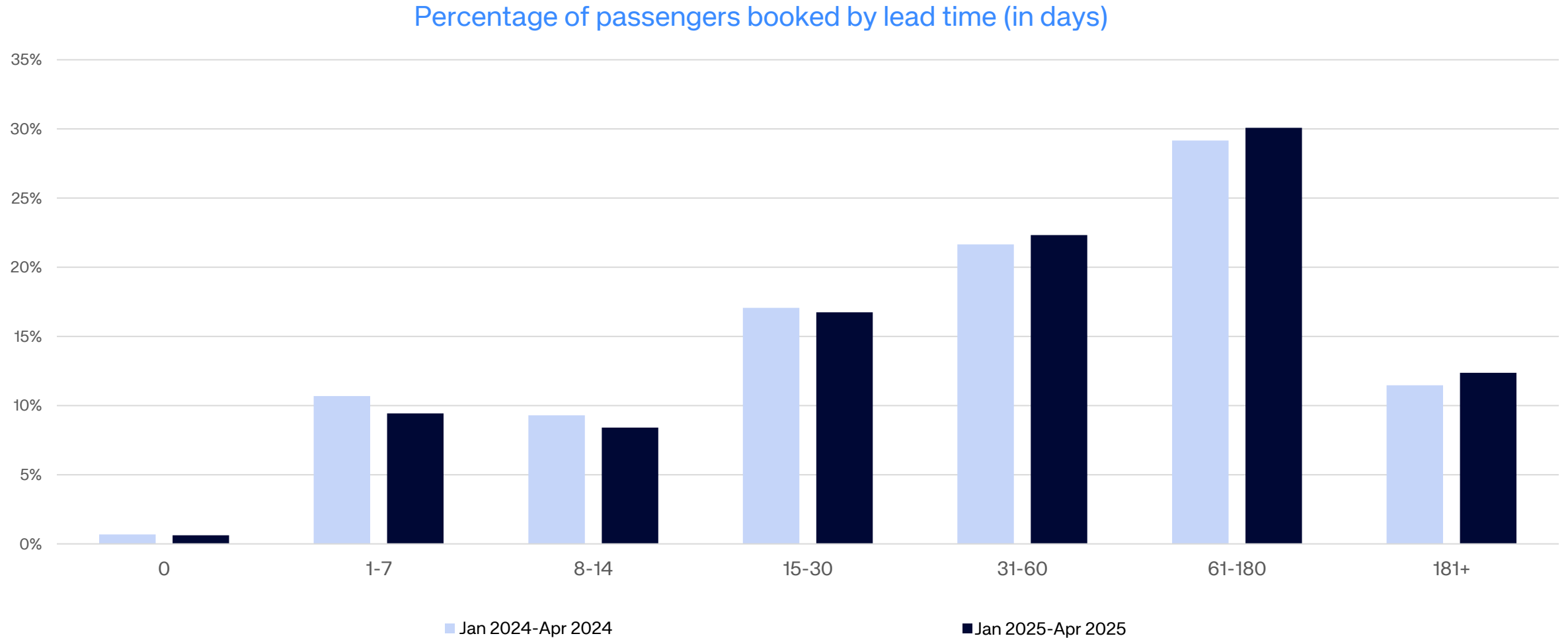
* International flights only

Worldwide to United States: Air travel bookings by Lead time

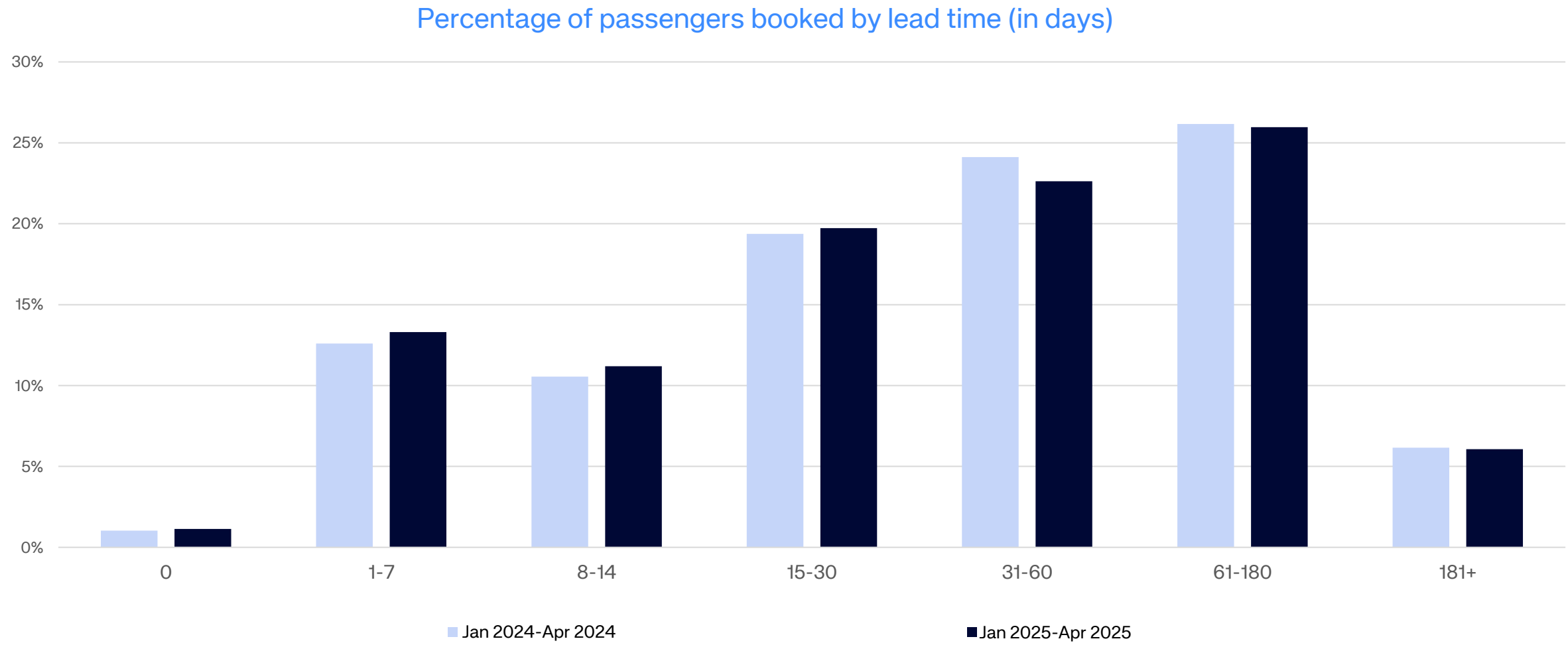


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Europe/Canada to United States: Air travel bookings by Lead time

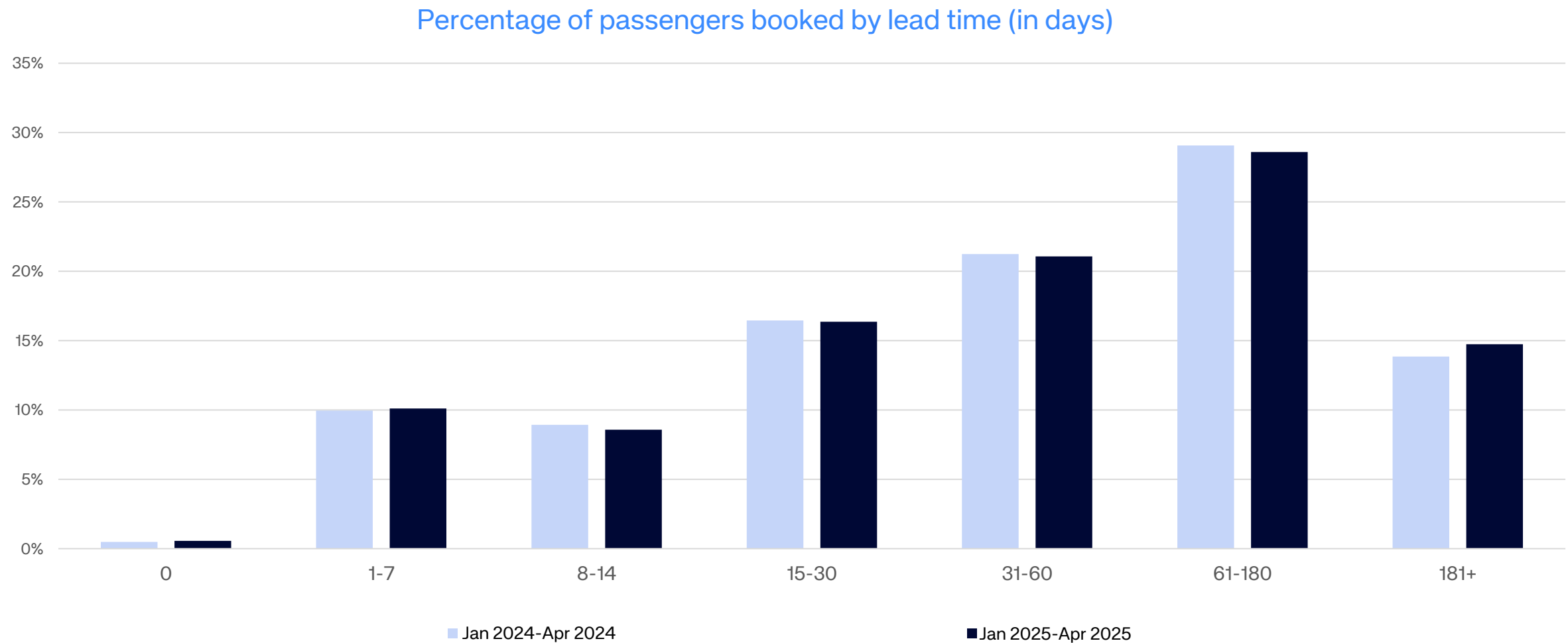


Canada to United States: Air travel bookings by Lead time



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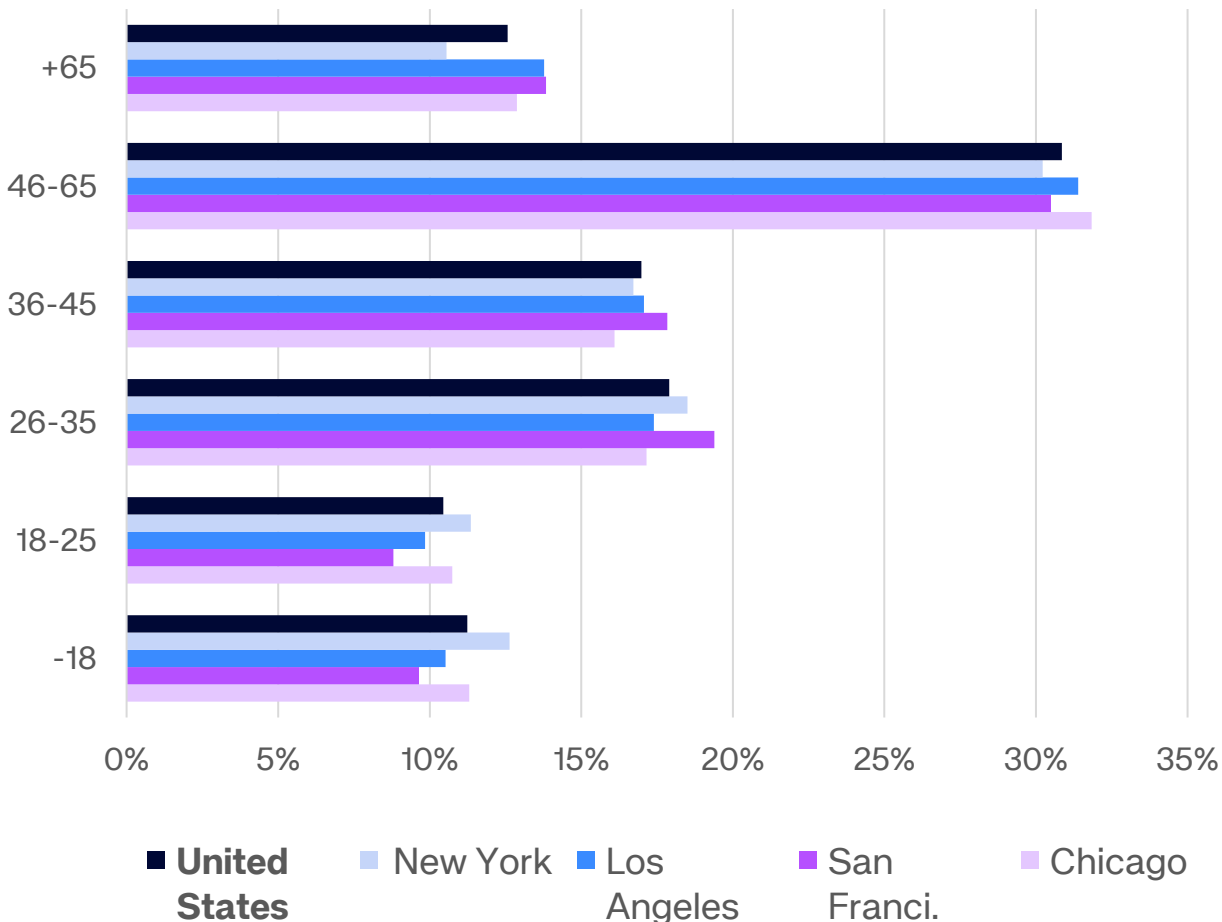
Europe to United States: Air travel bookings by Lead time



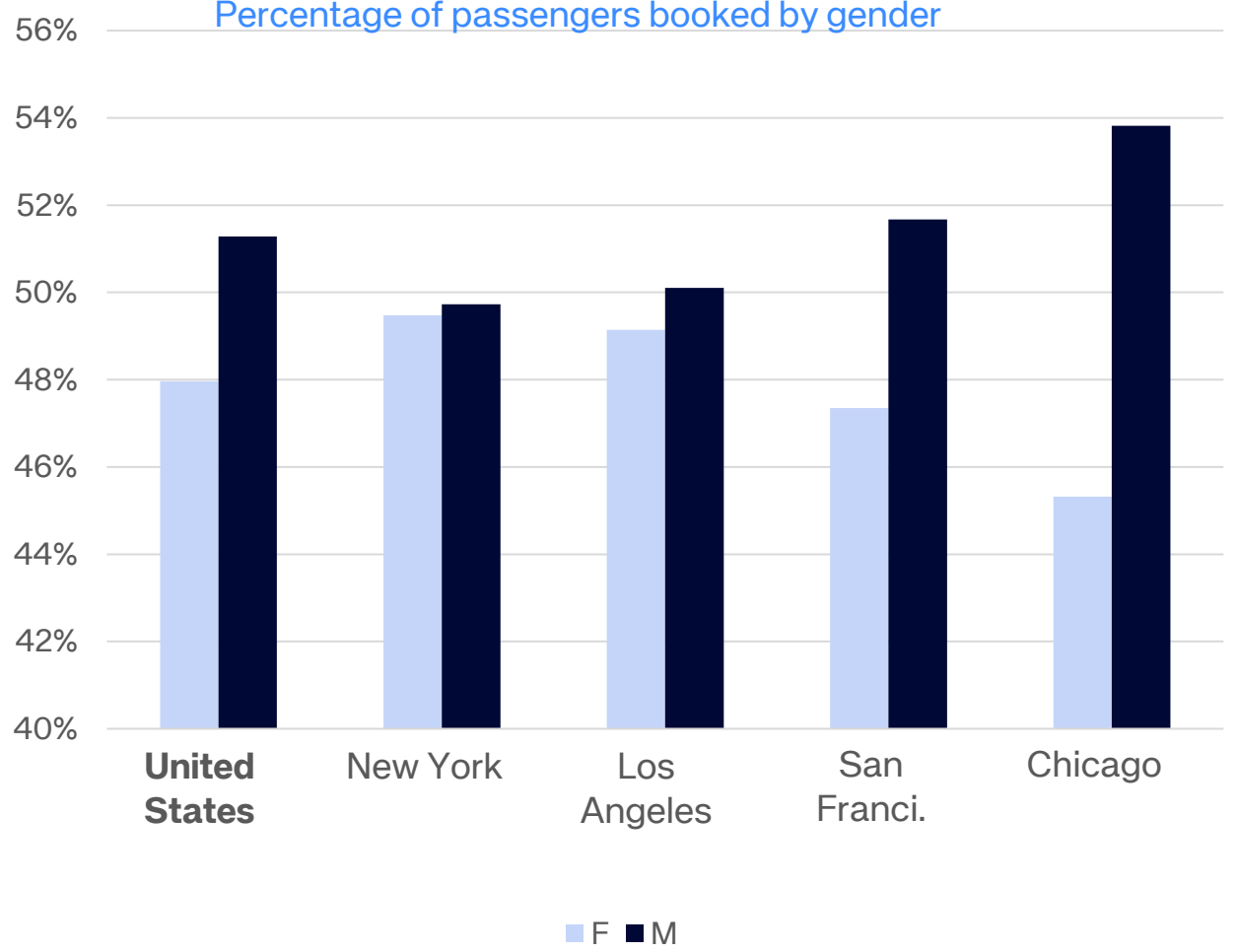
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Worldwide to United States: Exploring the types of travelers

Percentage of passengers booked by age category



Percentage of passengers booked by gender



Worldwide to United States: What is the cabin class distribution ?

Top 5 markets cabin class distribution to United States

Markets	May.24-Apr.25 Economy	Growth Economy	Growth Business
United States	93%	-4%	17%
Canada	94%	-3%	-1%
United Kingdom	65%	-8%	5%
Mexico	92%	-4%	5%
India	75%	-7%	3%

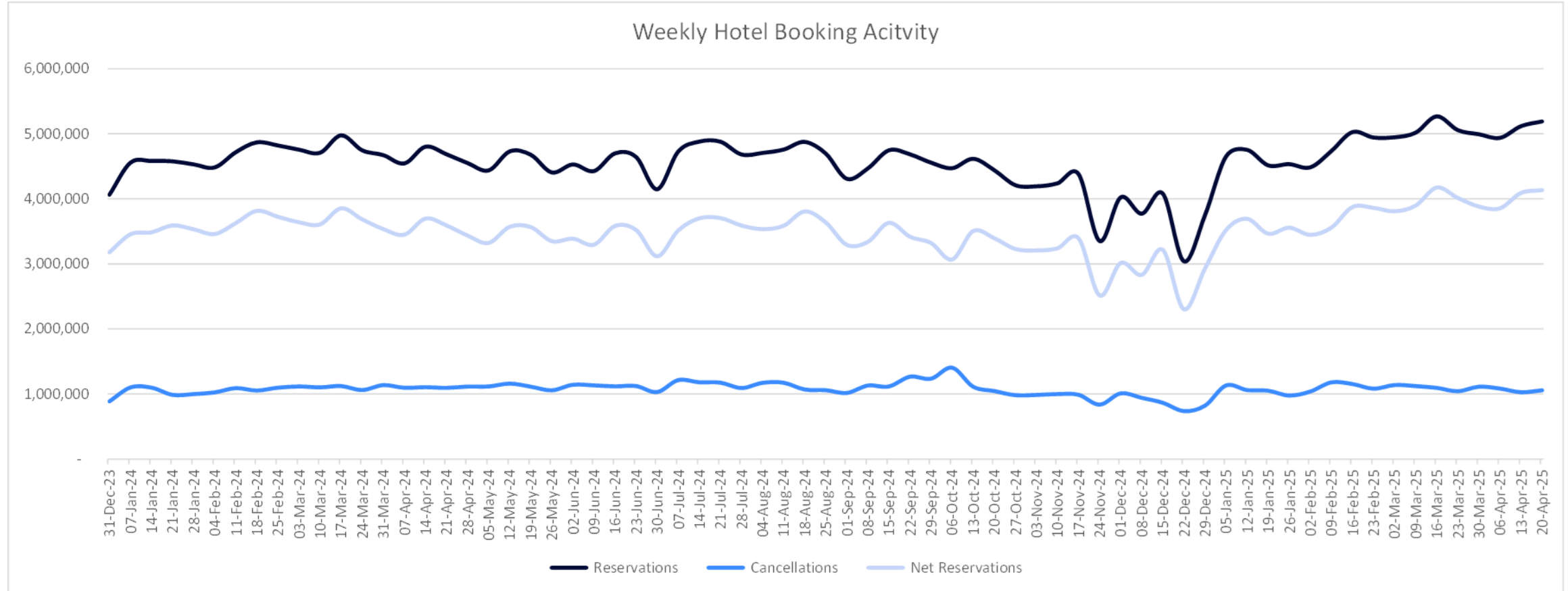
Worldwide cabin class distribution to United States and top 4 arrival cities

Destinations	May.24-Apr.25 Economy	Growth Economy	Growth Business
United States	90%	-4%	7%
New York	84%	-6%	2%
Los Angeles	85%	-7%	1%
San Francisco	83%	-7%	4%
Chicago	89%	-5%	20%

Hospitality Occupancy Overview – US/ Canada

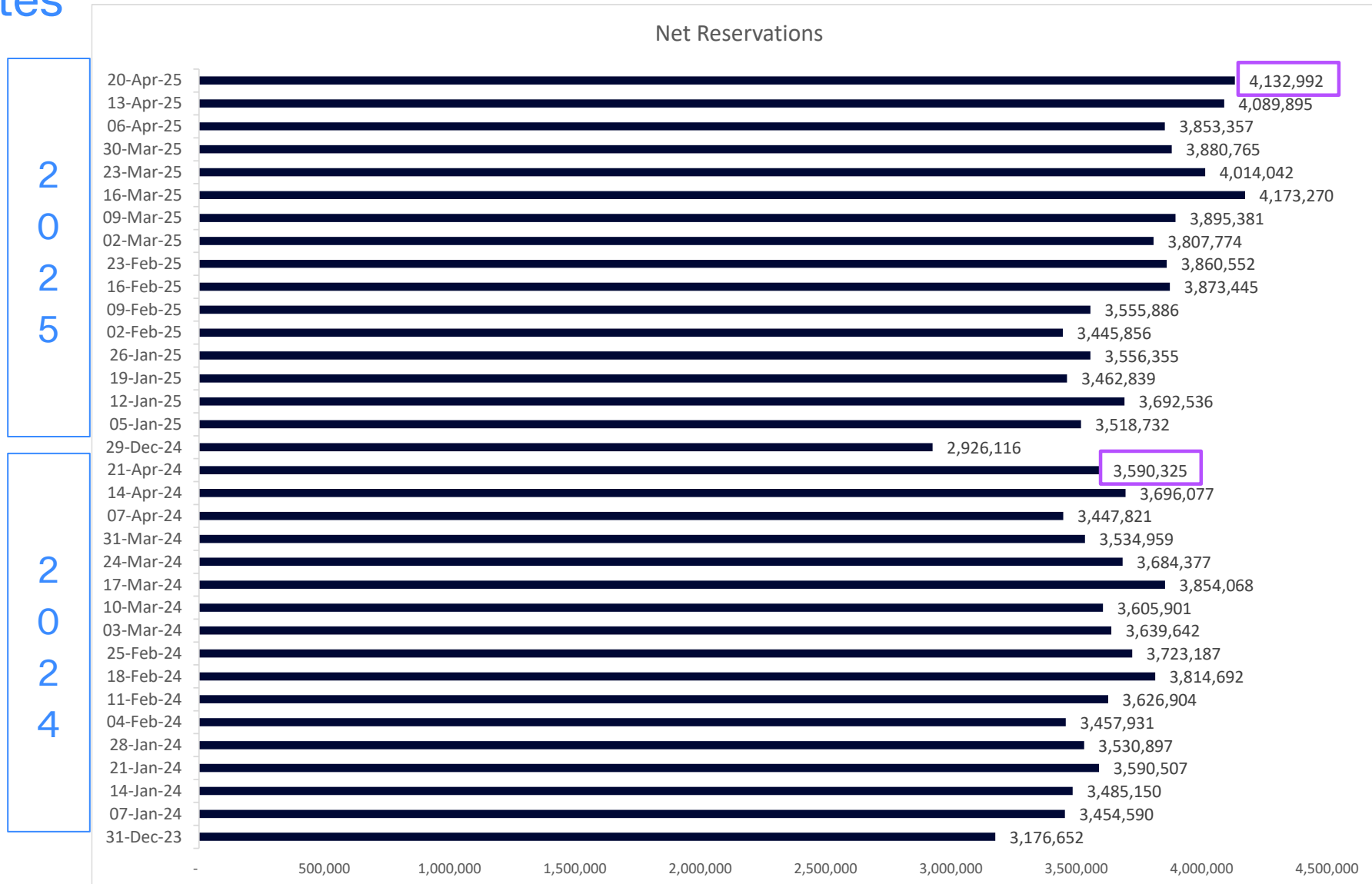
United States Hotel Booking Activity

Hotel Demand360®



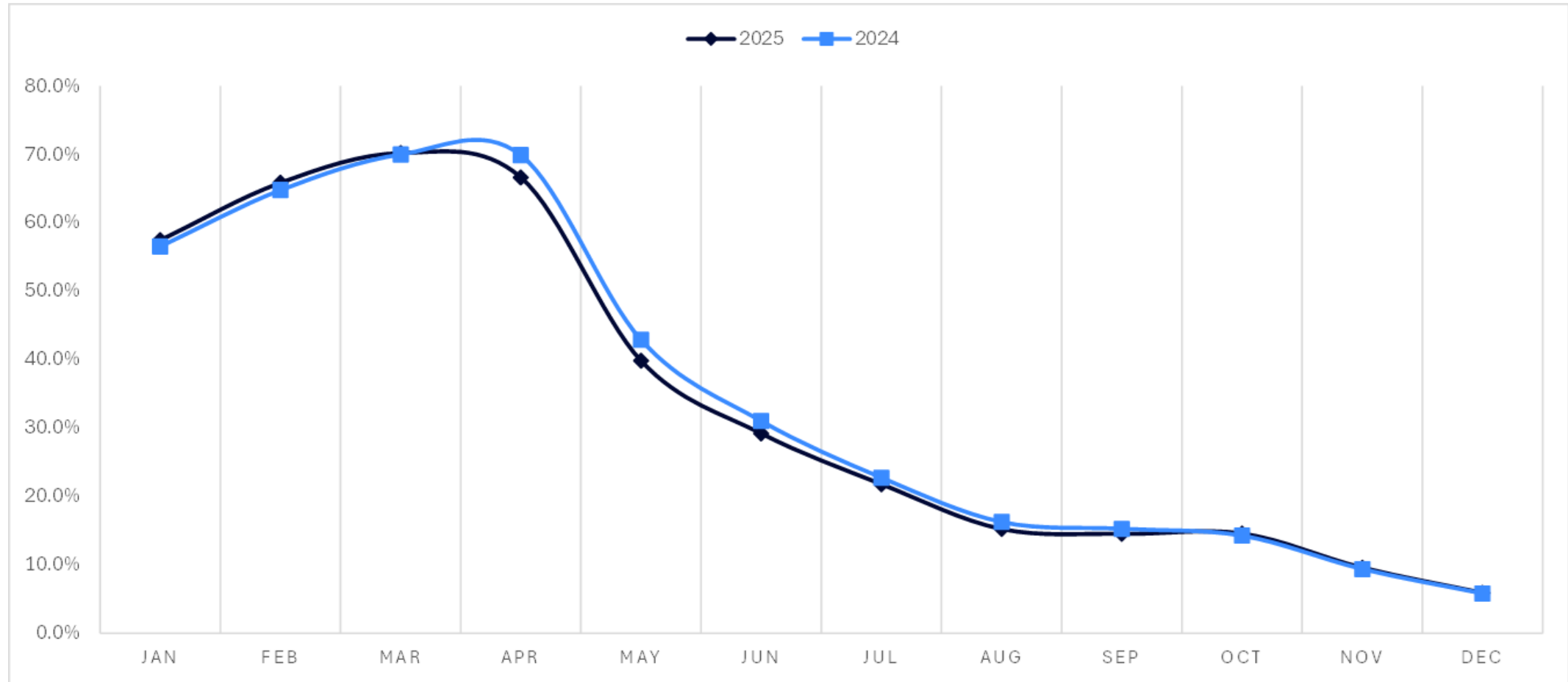
Net Hotel Booking Activity

United States



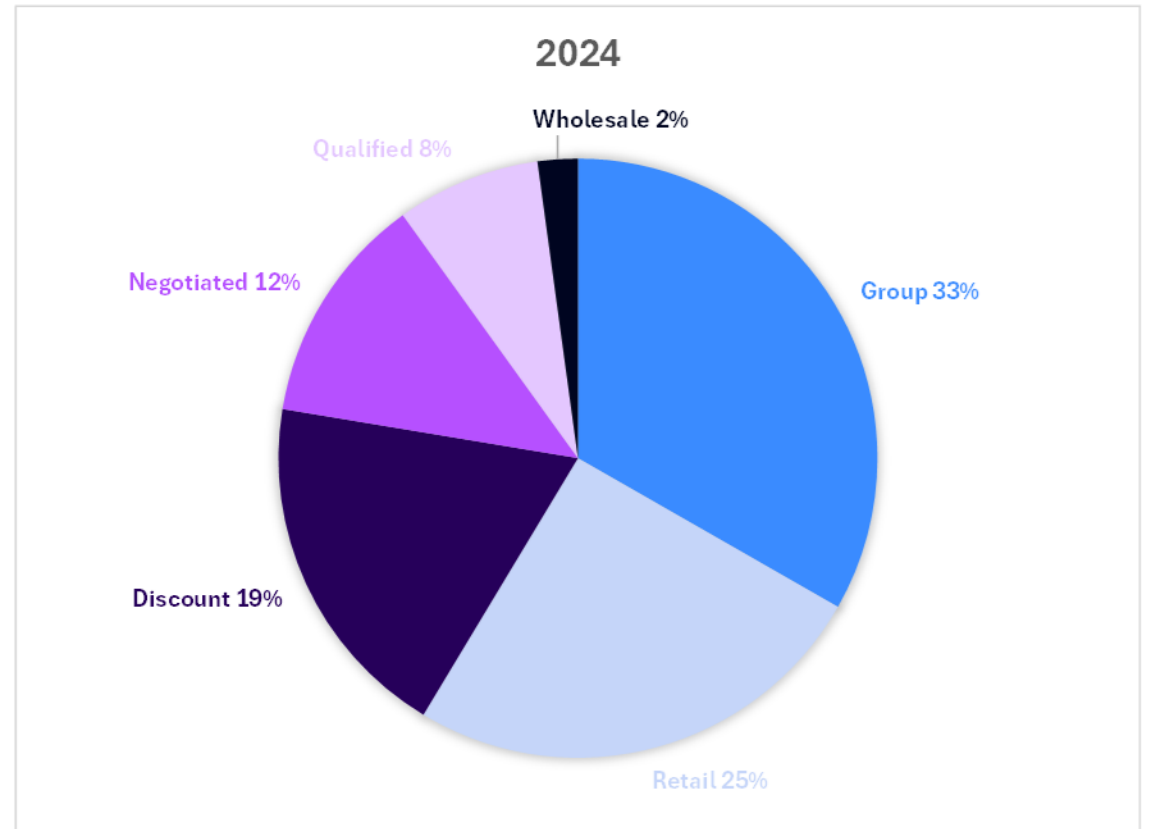
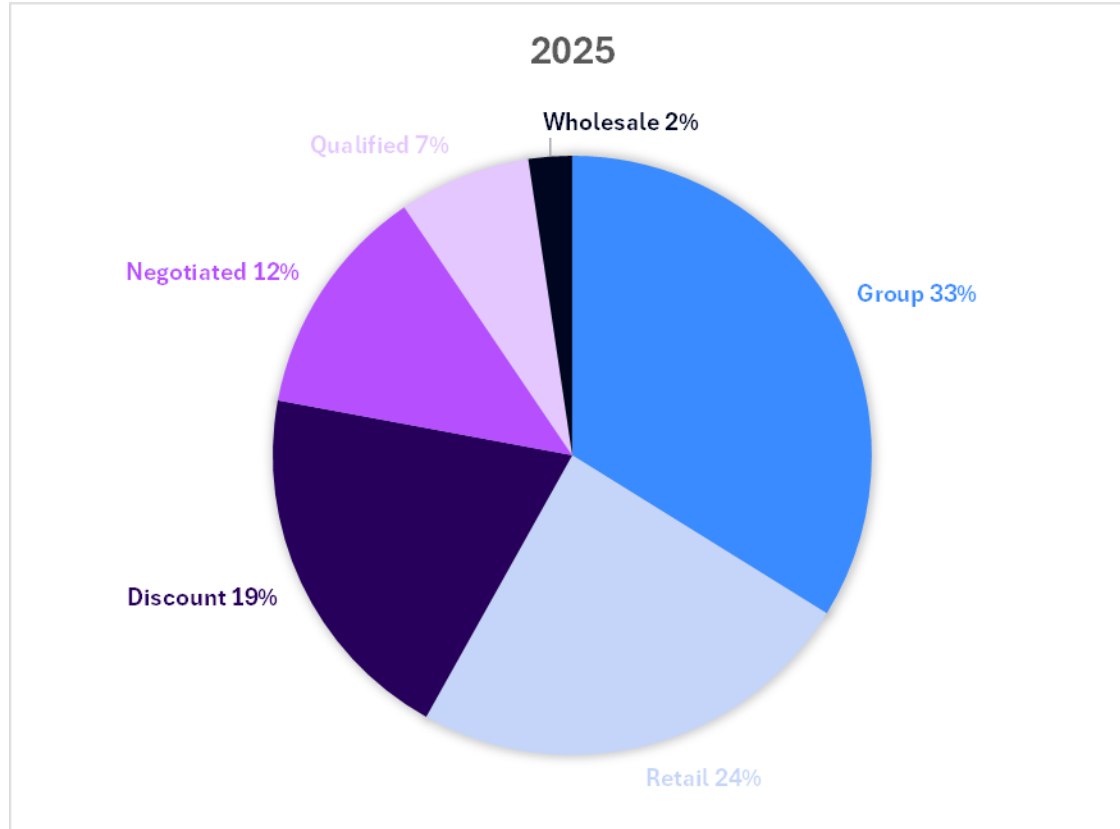
United States Occupancy

On-the-Books occupancy for 2025 is -0.6% points less than STLY



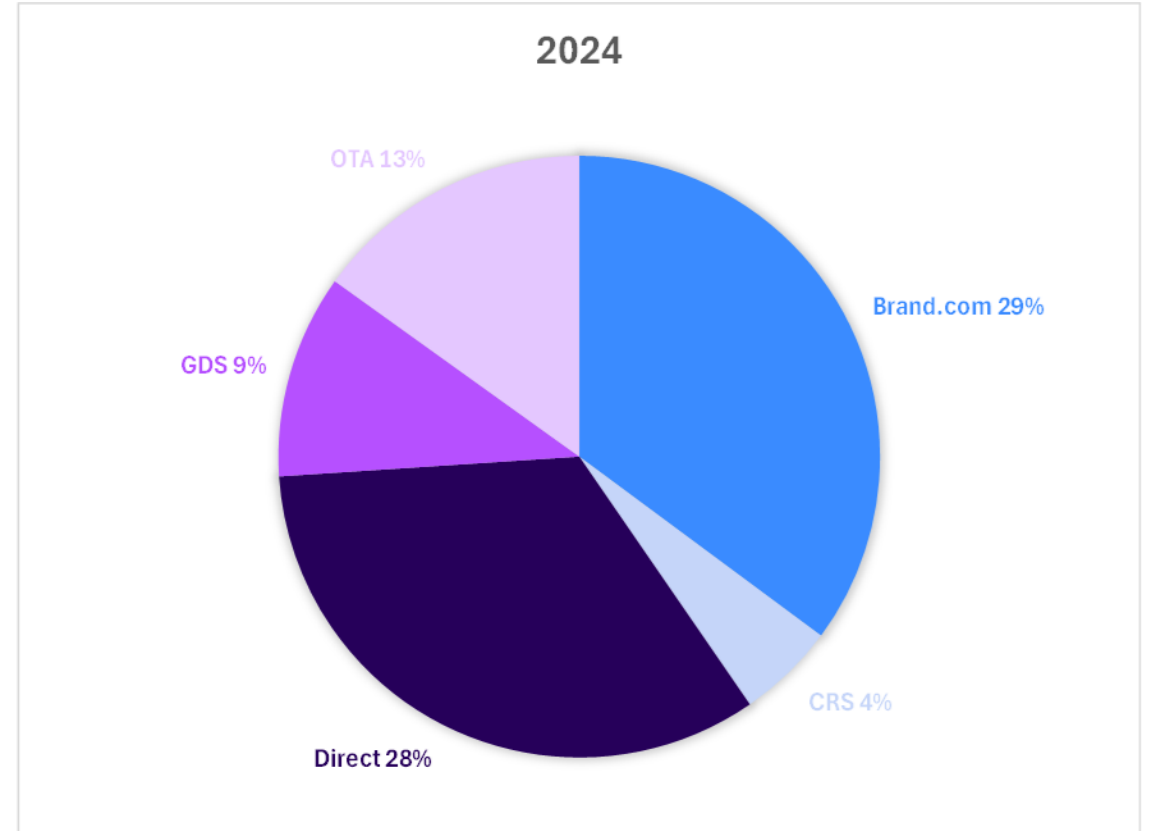
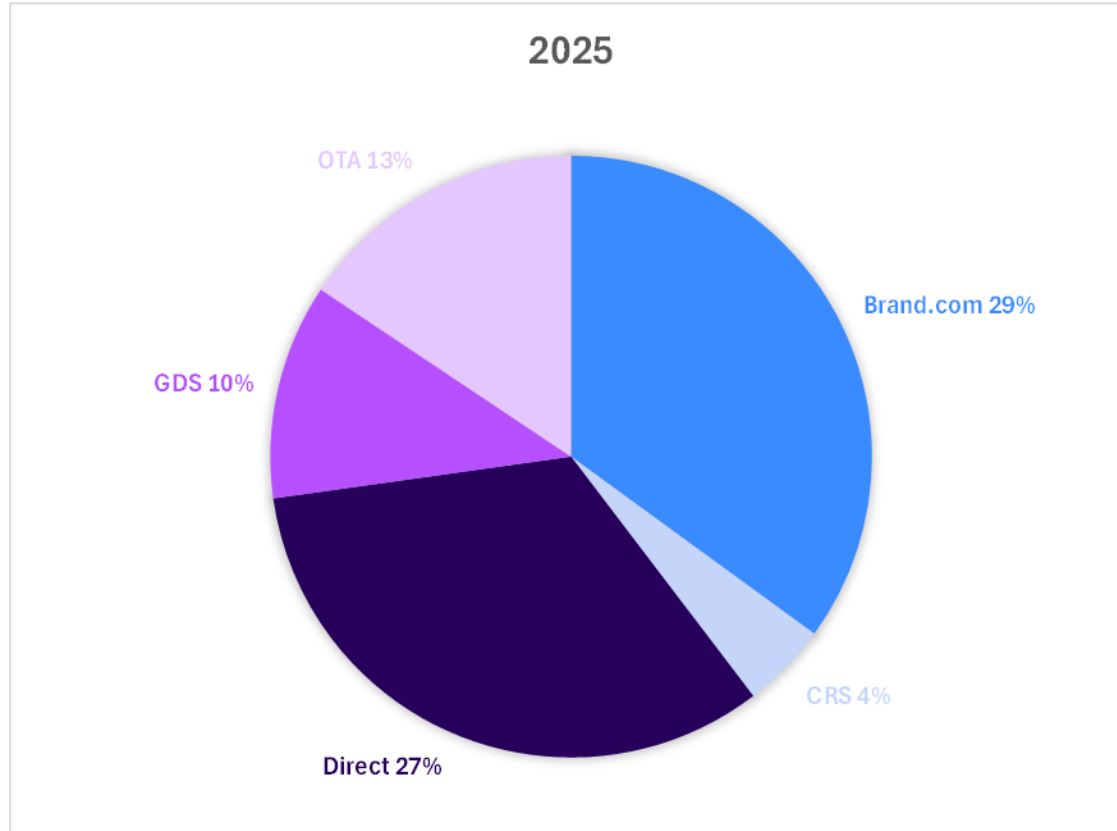
United States

Mix of Business



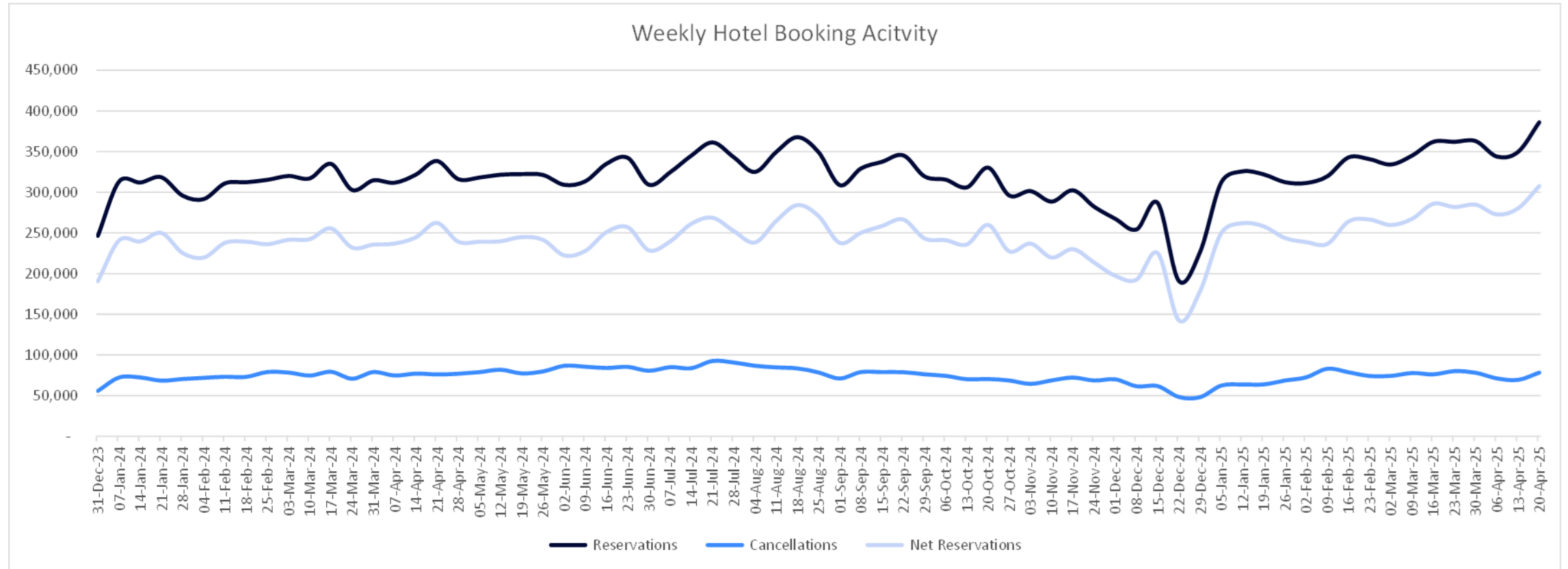
United States

Channel Mix



Canada Hotel Booking Activity

Hotel Demand360®

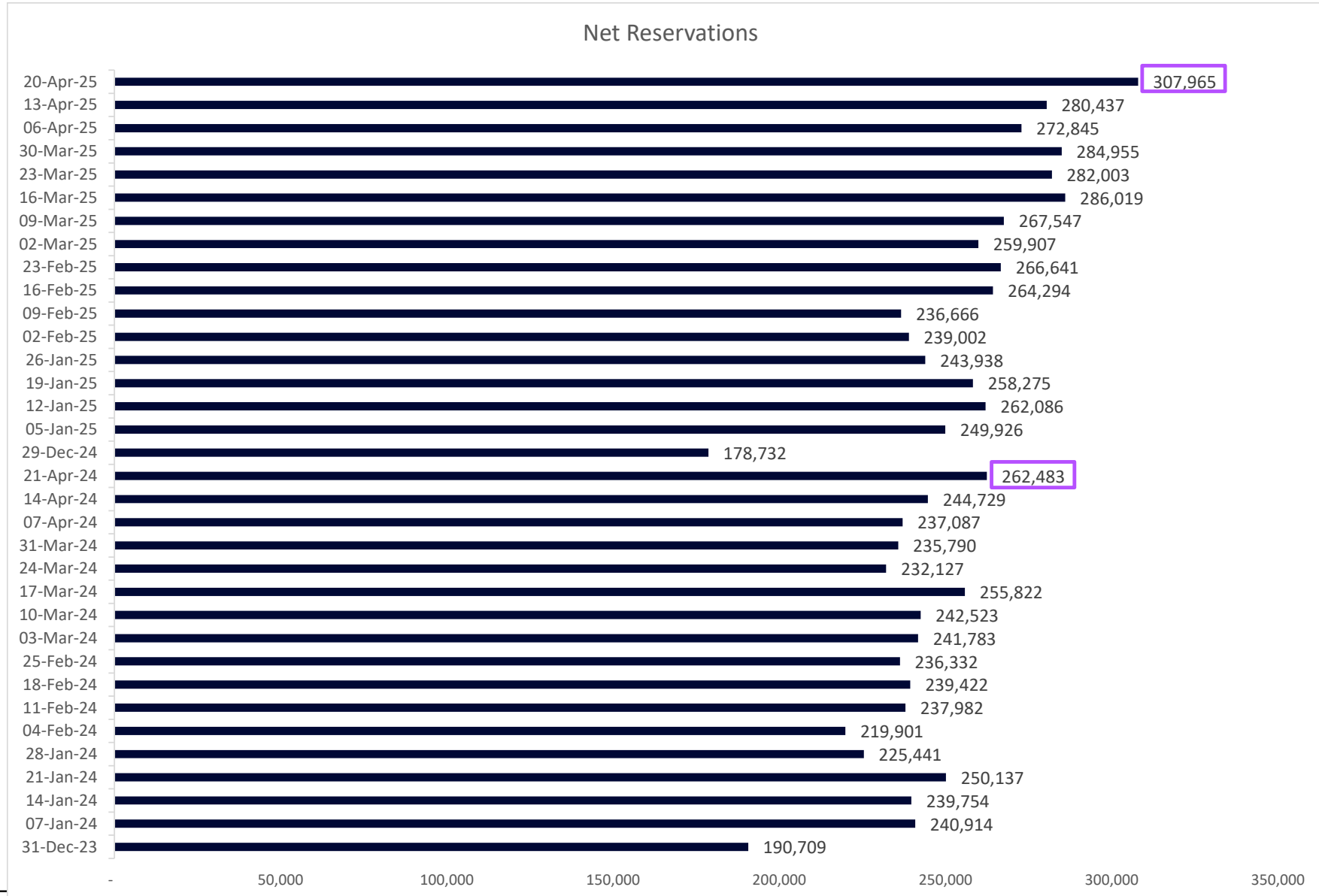


Net Hotel Booking Activity

Canada

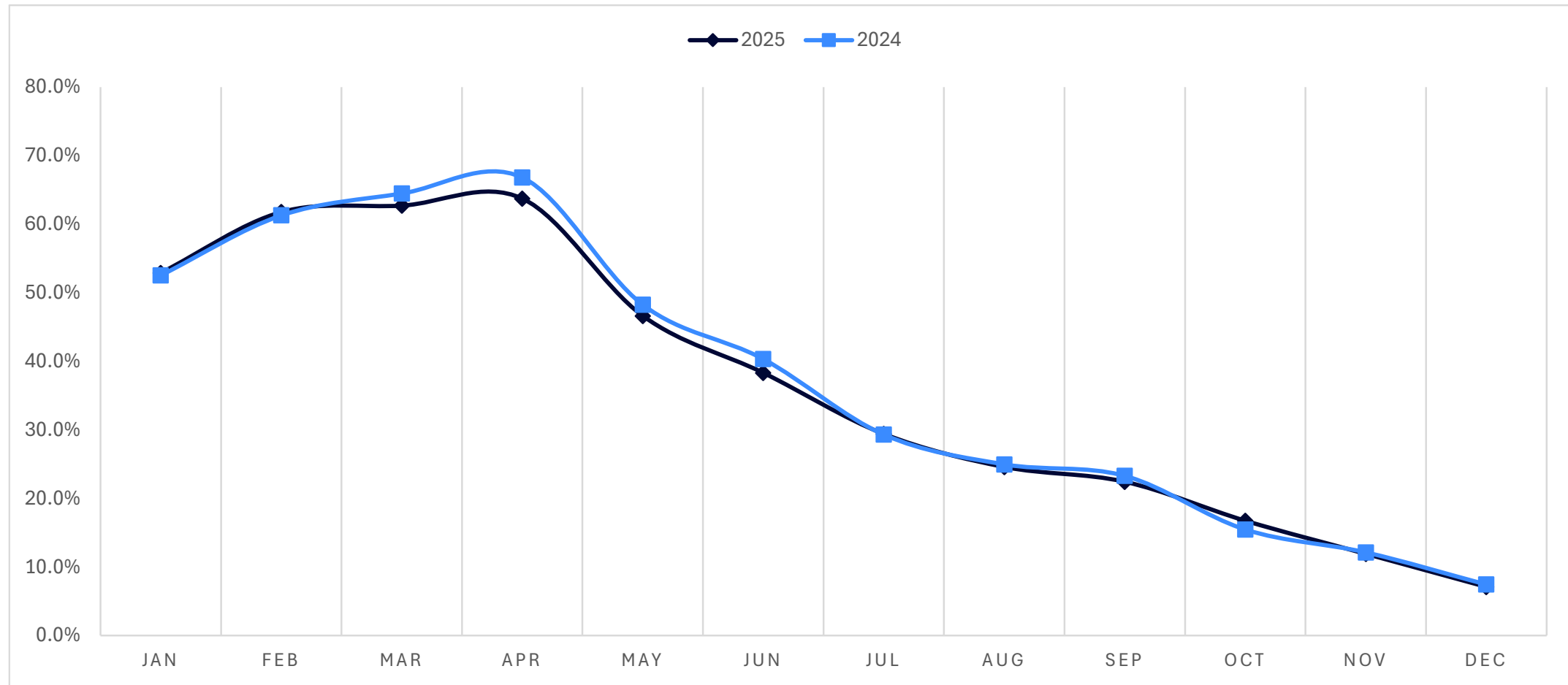
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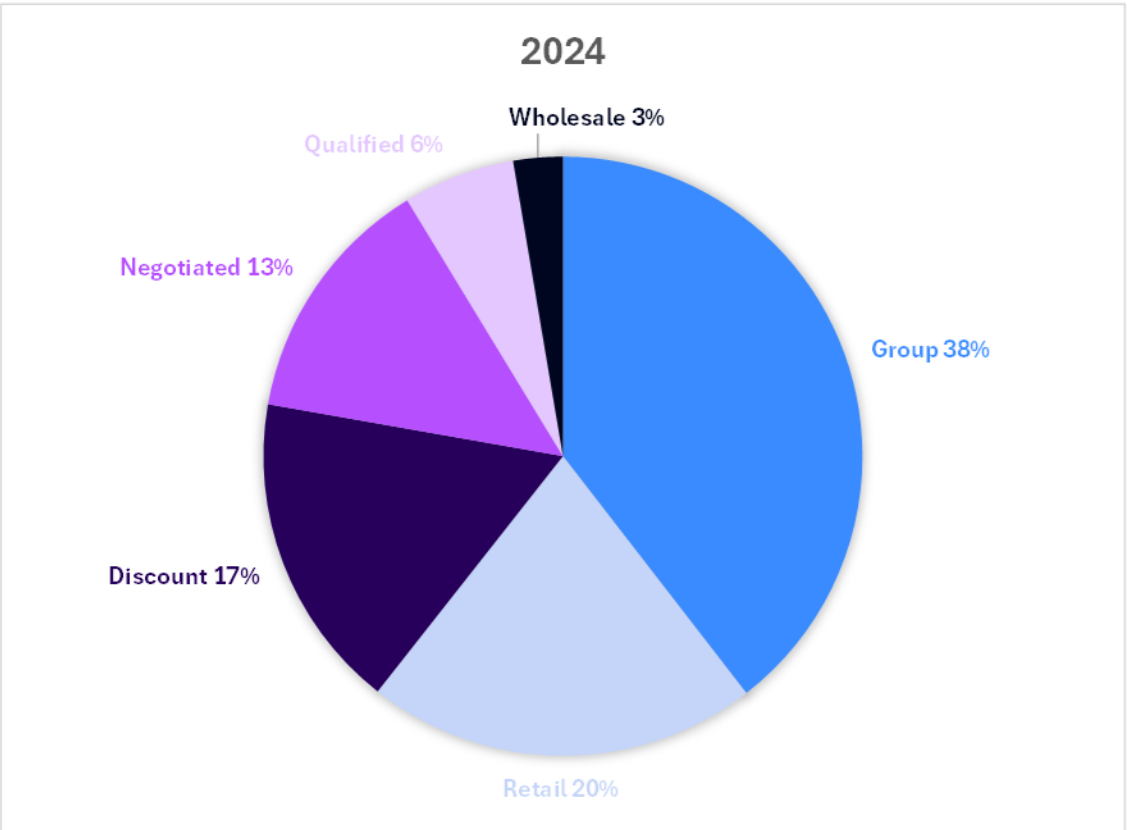
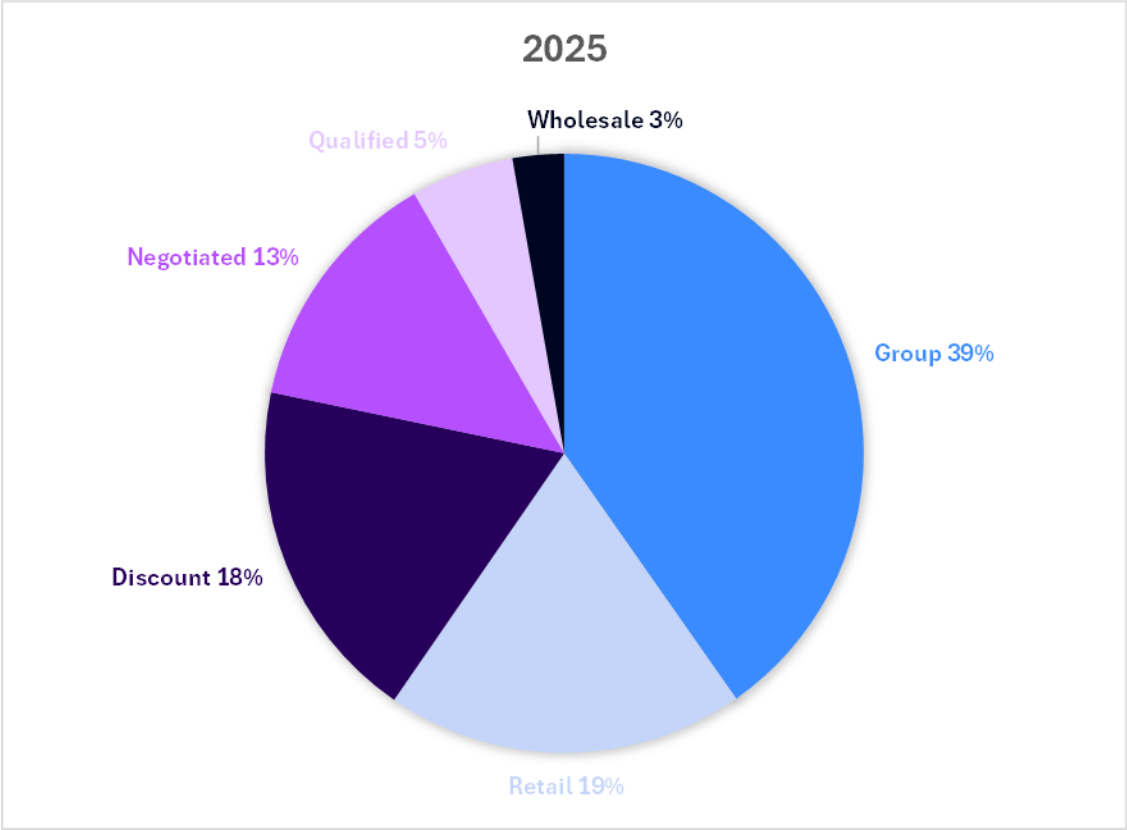
Canada Occupancy

On-the-Books occupancy for 2025 is -0.7% points less than STLY



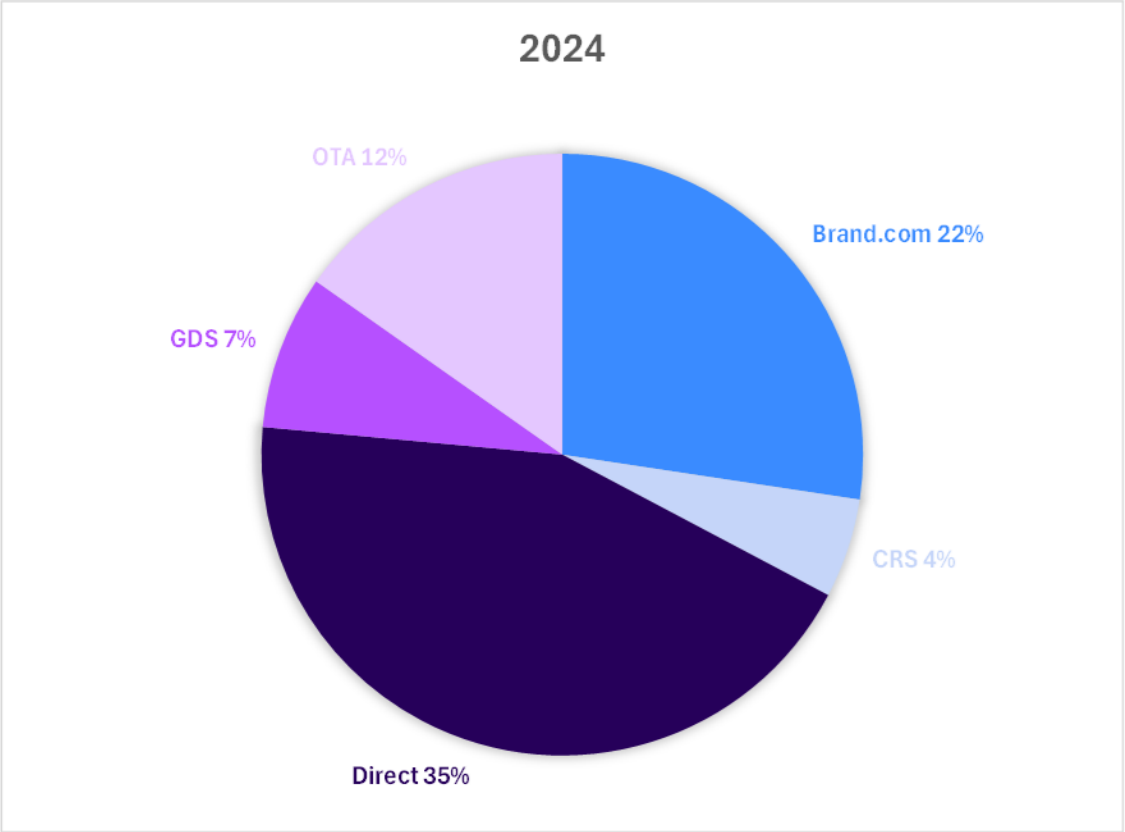
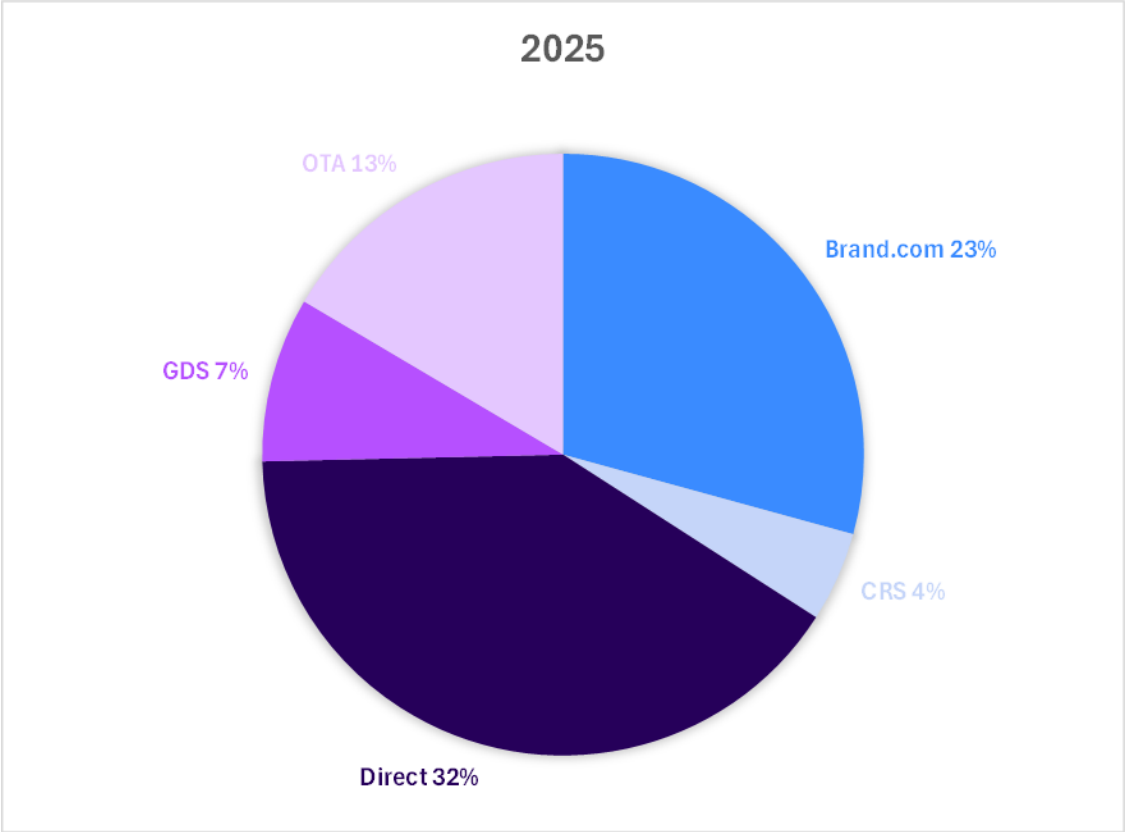
Canada

Mix of Business



Canada

Channel Mix



Poll

Are you interested in additional free virtual training/solution information focused on a specific role?

- a) Training for Sales
- b) Training for Directors of Marketing
- c) Training for Revenue Management
- d) Training for other roles
- e) Not interested



Thank you