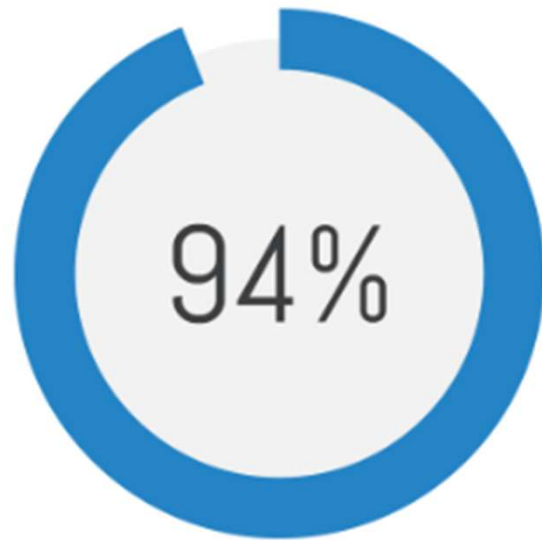


# USTOA ANNUAL ACTIVE MEMBER TREND SURVEY

*Released on December 4, 2023  
at USTOA's Annual Conference & Marketplace*



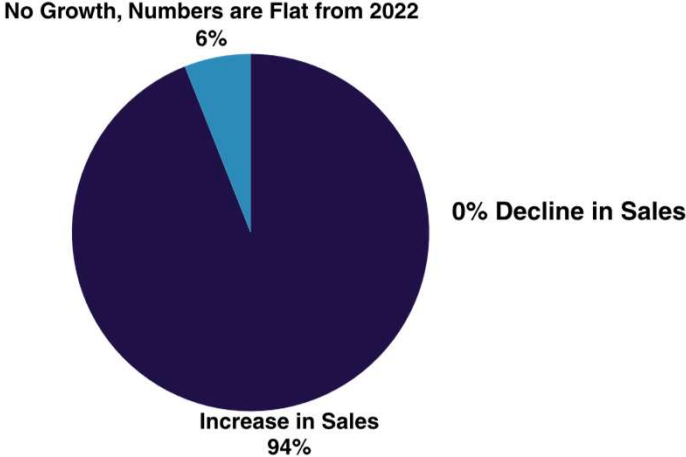
# USTOA Active Member Survey



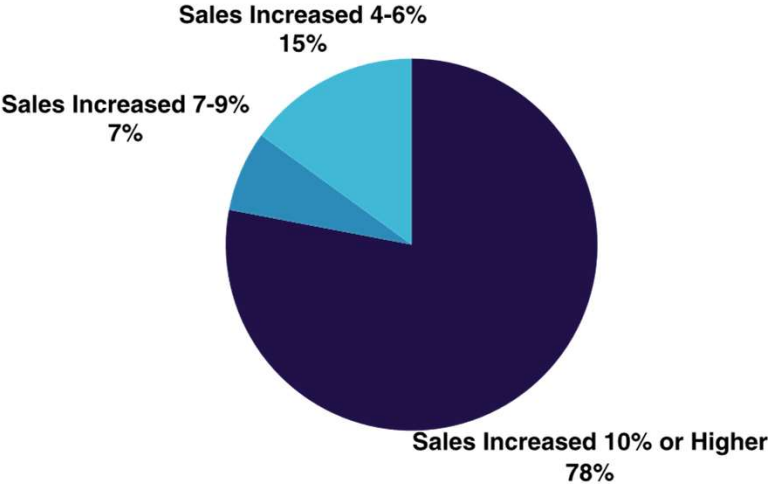
PARTICIPATION BY ACTIVE MEMBERS

# How's Business?

**94%** REPORTED AN INCREASE IN SALES IN 2023



OF THOSE, **78%** SAID SALES INCREASED 10% OR HIGHER



# How's Business?

## 2023 TRAVELERS

**94%** OF MEMBERS REPORTED  
A GROWTH IN PASSENGERS  
IN 2023



**73%** OF THOSE MEMBERS  
SAID PASSENGER NUMBERS  
GREW 10% OR HIGHER



# 2024 BUSINESS FORECAST



## 2024 Bookings

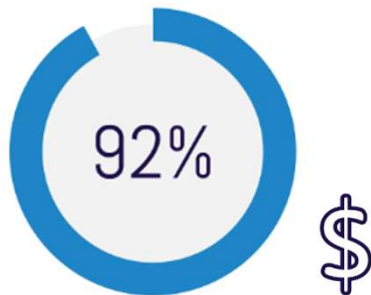
86%

Active Members are “highly confident to confident” that guest bookings will increase in 2024



2024

## SALES



anticipate growth in sale volumes in 2024...and **two thirds (63%)** forecasting “optimistic” to “significant” growth anywhere from 7 to 10% and higher

## PASSENGERS



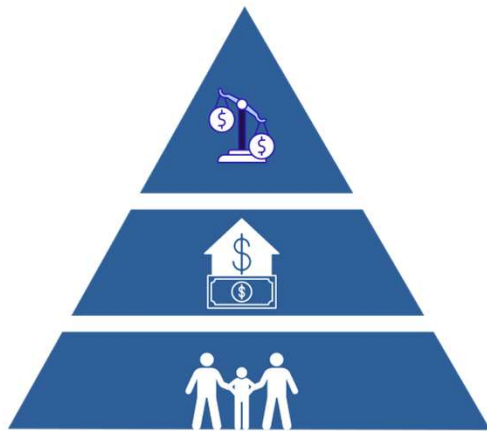
anticipate growth in passengers in 2024...and **two thirds (63%)** forecasting “optimistic” to “significant” growth anywhere from 7 to 10% and higher



# Potential Threats To Confidence In Travel In 2024

## TOP THREE

1. ECONOMIC UNCERTAINTY
2. COST OF LIVING INCREASES
3. TERRORISM



INTEGRITY  
IN TOURISM **USTOA**  
United States Tour Operators Association

## FOLLOWED BY...

POLITICAL INSTABILITY  
CONTINUED WAR IN EUROPE  
PANDEMICS/OTHER HEALTH CRISES  
PRESIDENTIAL ELECTION  
NATURAL DISASTERS  
WIDESPREAD STAFFING SHORTAGES  
CROWDED TOURISM DESTINATIONS





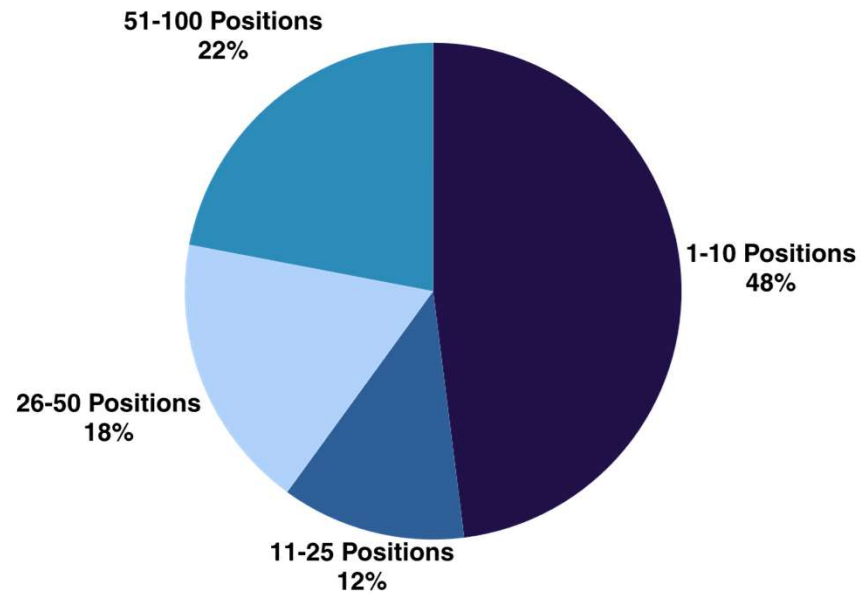
# STAFFING



## 2023 Jobs

# 86%

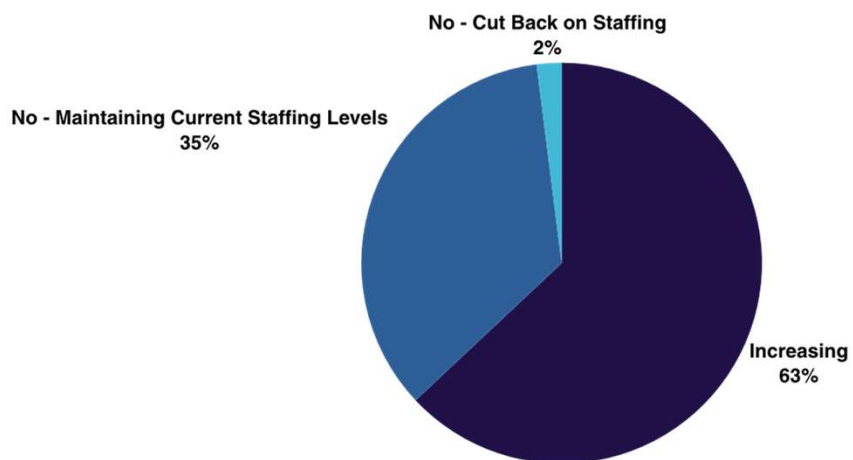
### ACTIVE MEMBERS INCREASED STAFFING LEVELS IN 2023



# 2024 Jobs

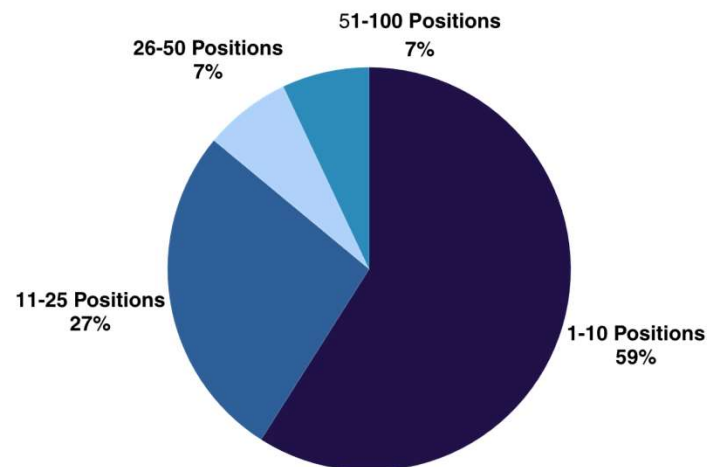
## TWO THIRDS (63%)

PLAN TO INCREASE STAFF  
HEADCOUNT IN 2024



## MORE THAN HALF (59%)

PLAN TO INCREASE STAFF HEADCOUNT BY  
1 – 10 POSITIONS



# TRAVEL ADVISORS



## Travel Advisor Impact

**88%** of members plan to utilize travel advisors to generate sales in **2024**



**80%** of members report that travel advisors will play a very important/important role in their business in **2024**



In 2024, **98%**

of members expect business booked by travel advisors to increase or remain the same



# 2024 TRAVEL TRENDS



# TOP INTERNATIONAL DESTINATIONS



Italy



France



UK & Spain  
(tied)

# TOP DOMESTIC DESTINATIONS

1



California

2



Alaska

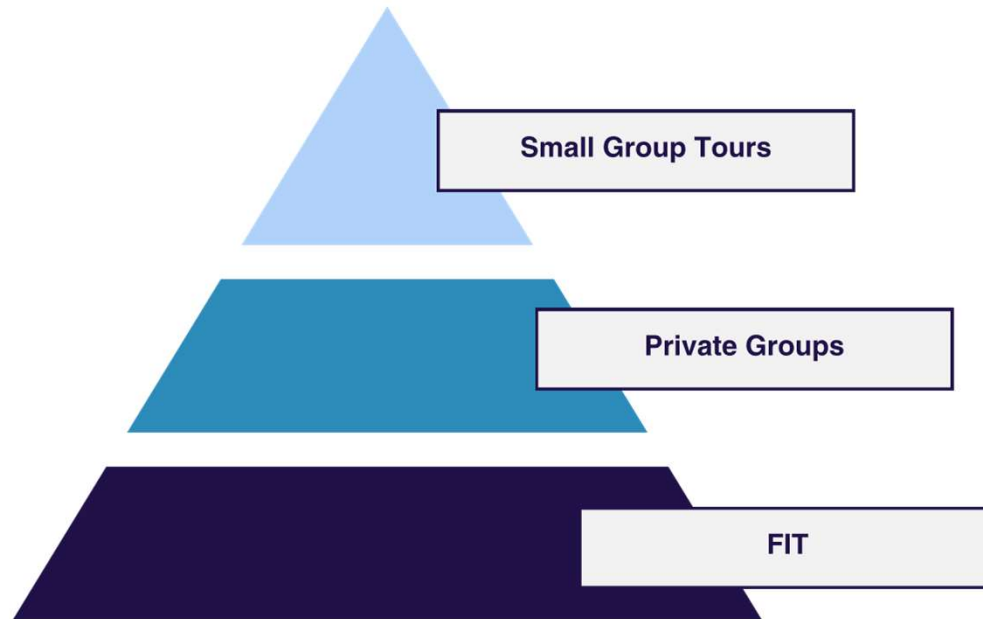
3



New York



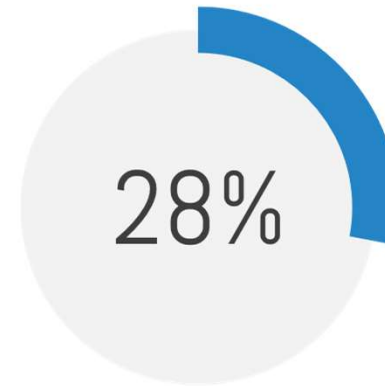
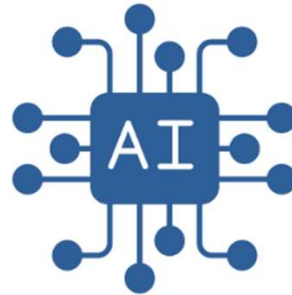
# 2024 PRODUCTS WITH STRONGEST PASSENGER GROWTH TRAJECTORY



# What will influence consumers choosing a travel destination in 2024?



# AI



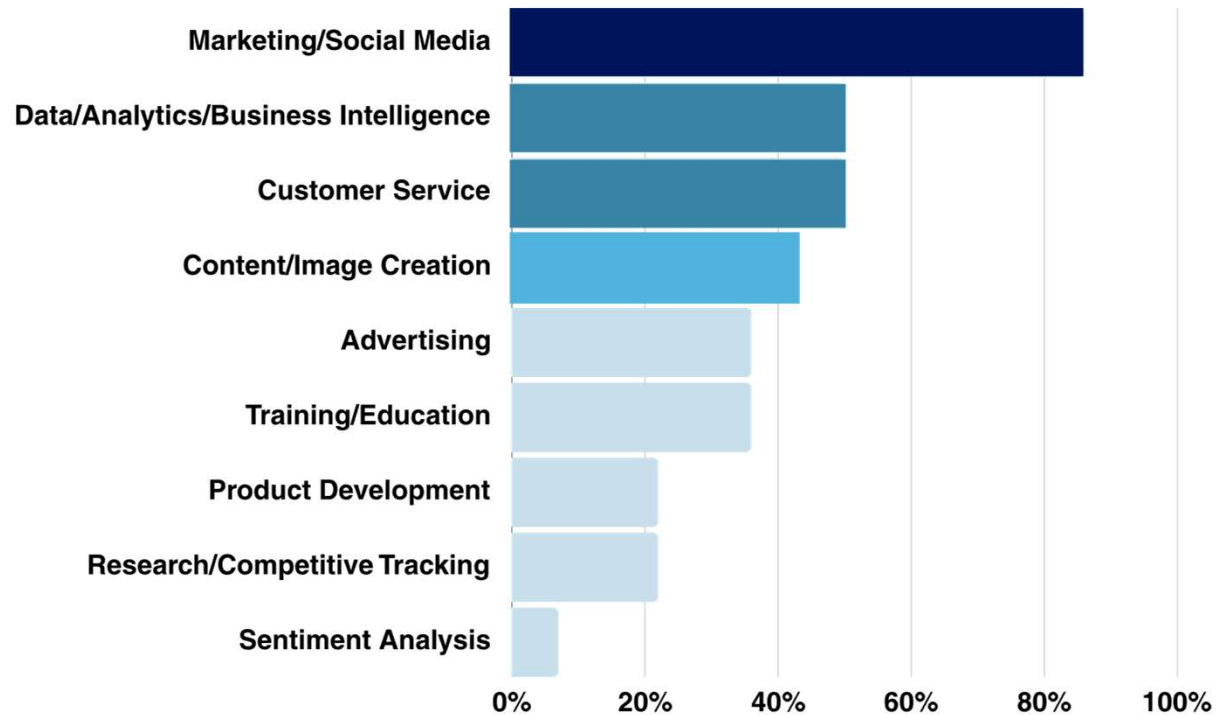
**MORE THAN HALF (55%)**  
OF MEMBERS VIEW AI AS AN OPPORTUNITY  
FOR THEIR BUSINESS

**A QUARTER (28%)** OF  
MEMBERS ARE CURRENTLY USING AI AS  
PART OF ITS BUSINESS MODEL...**MORE**  
**THAN A THIRD (39%)** ARE NOT  
CURRENTLY USING AI BUT PLAN TO IN THE  
FUTURE

# HOW USTOA ACTIVE MEMBERS ARE USING AI

## TOP THREE USES

1. Marketing/social media
2. Customer service and Data/analytics/business intelligence
3. Content/image creation

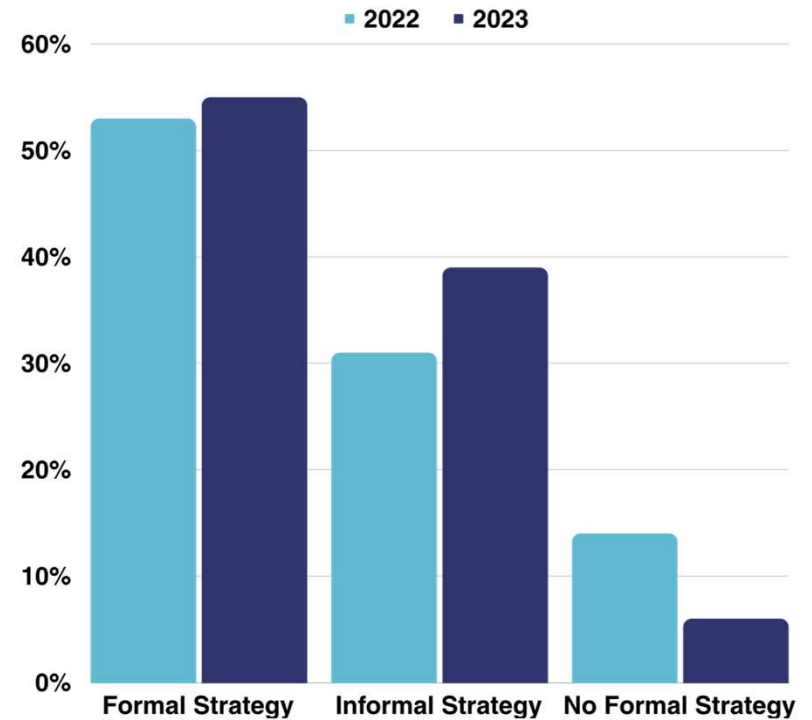


# SUSTAINABILITY/DEI



# USTOA ACTIVE MEMBER POSITION ON SUSTAINABILITY

**MORE THAN HALF (55%)**  
OF MEMBERS AT LEAST HAVE A  
FORMAL, DOCUMENTED  
SUSTAINABILITY STRATEGY



# REASONS FOR ADOPTING A SUSTAINABILITY STRATEGY

## TOP THREE

1. CORPORATE VALUES AND CULTURE
2. RESPONDING POSITIVELY TO GLOBAL CRISES
3. BRAND & PR



## FOLLOWED BY...

- Stakeholders (staff, board, shareholders, customers, public demanding it)
- Directive from organization leadership
- Compliance with regulations/policies
- Competition (falling behind - staying ahead)
- Reputational risk
- Reducing costs
- Access to finance

# External Influence

## VENDORS

NINE OUT  
OF TEN

TAKE INTO ACCOUNT A COMPANY'S APPROACH TO SUSTAINABILITY AND SOCIAL IMPACT WHEN CHOOSING A VENDOR PARTNER

## CUSTOMERS

ONE THIRD (33%)

SAY SUSTAINABILITY IS "IMPORTANT" TO "VERY IMPORTANT" TO THEIR CUSTOMERS

HALF (49%)

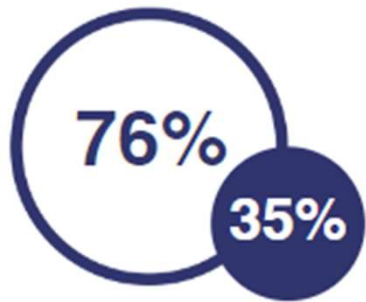
OF MEMBERS REPORT THAT SUSTAINABILITY IS "SOMEWHAT IMPORTANT" TO THEIR CUSTOMERS.





# Diversity & Inclusion - Networks & Policies

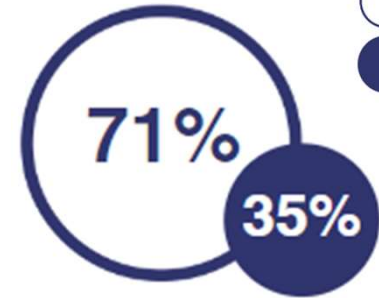
○ Policies  
● Networks



Race and Ethnicity



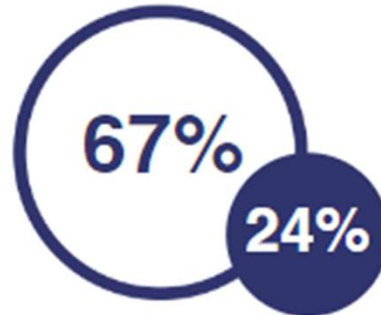
LGBTQ+



Gender



Age



Faith/Religion



Seen or Unseen Disability



## SUSTAINABILITY/DEI IN MARKETING AND SALES



ROUGHLY HALF (45%) CURRENTLY USE **SUSTAINABILITY MESSAGING** IN MARKETING AND/OR SALES...WHILE 37% PLAN TO INCORPORATE SUSTAINABILITY MESSAGING IN 2024/2025



MORE THAN A THIRD (39%) CURRENTLY USE **DEI MESSAGING** IN MARKETING AND/OR SALES...WHILE 18% PLAN TO INCORPORATE DEI MESSAGING IN 2024/2025