Euromonitor International

TOURISE



THE FUTURE TRAVELLER

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FOREWORD



The future of tourism will be defined by how well we understand why people travel, what they value, and how their expectations are evolving.

Global tourism continues to demonstrate remarkable strength, with international arrivals reaching 1.52 billion in 2025. Yet beneath this growth, a profound transformation is underway. Economic uncertainty, technological innovation, demographic shifts and changing lifestyles are reshaping global travel demand, creating new challenges and opportunities for destinations around the world.

The Future Traveller, developed by TOURISE in collaboration with Euromonitor International, challenges conventional assumptions about travel demand. It highlights a fundamental shift: travellers can no longer be understood through fixed demographic profiles alone. Their choices are increasingly shaped by distinct travel moments, reflecting the motivations, priorities and circumstances behind each journey.

These shifts present significant opportunities. Travellers are becoming more deliberate in their choices, seeking experiences that reflect their priorities and deliver meaningful value. They increasingly seek authentic cultural connections, personal wellbeing, greater flexibility and journeys that are easier to navigate. Artificial intelligence and emerging technologies can help meet these expectations, enabling more personalised, connected and responsive travel experiences.

For governments, destinations and businesses, the implications are significant. Meeting these expectations requires us to rethink how destinations are developed, how investment is directed and how the wider tourism ecosystem operates.

The opportunity is to build destinations that are not only more attractive to visitors, but also more connected, adaptable and capable of delivering lasting benefits to the communities that welcome them.

Equally important is how we define success. Visitor numbers and expenditure remain important measures of growth, but tourism's contribution must also be measured by the value it creates. We must look beyond attracting high-value travellers towards enabling high-value trips that enrich visitor experiences, strengthen local economies, empower communities and contribute to the long-term prosperity of destinations.

At TOURISE, our ambition is not simply to anticipate the future of tourism, but to help shape it. By convening leaders from tourism and beyond, we seek to challenge established thinking, advance new ideas and forge the partnerships needed to translate insight into meaningful action. This report contributes to that ambition, offering policymakers, industry leaders and investors a fresh perspective on the traveller of 2030 and the opportunities ahead.

The destinations that lead tomorrow will be those that turn a deeper understanding of travellers into better experiences, stronger communities and more prosperous economies.



HIGHLIGHTS: EXECUTIVE SUMMARY

Ten takeaways for destinations, businesses and investors preparing for the traveller of 2030.

01

The Future Traveller Is Not a Demographic. It Is a Moment.

The same person can be a budget traveller on one trip and a premium guest on the next. Affordability, influence and control over time are redefining demand. The travel moment, not the demographic profile alone, is the new strategic lens.

02

Travellers Are Cutting Costs, Not Their Reasons to Travel.

In Q2 2026, 54% of surveyed US travellers were cutting spending elsewhere to preserve their travel plans. Travellers are making sharper trade-offs around what matters most. Destinations must create compelling reasons to visit, not simply compete on price.

03

The Battle for Tourism Demand Is Won Before the Search.

With 76% of surveyed parents reporting Gen Alpha influence on international destination choice, traditional marketing assumptions are being challenged. Children, creators, communities and AI increasingly shape consideration before planning begins. Destinations must rethink how and where they influence demand.

04

Time, Not Just Money, Is Reshaping Travel Demand.

Older travellers account for a disproportionate share of consumer spending, while flexible work and changing family structures reshape travel schedules. Control over time is becoming a powerful demand driver, creating opportunities to extend stays and attract visitors beyond peak periods.

05

Authenticity Cannot Be Manufactured. Its Economic Value Can Be Unlocked.

Canada's Indigenous tourism generated CAD 3.7 billion in 2023, demonstrating the economic potential of living culture. Destinations that empower local communities and cultural enterprises can create distinctive experiences, strengthen local economies and build advantages that competitors cannot easily replicate.

06

The Seamless Journey Is Not Enough. The Recoverable Journey Matters.

Travellers increasingly expect journeys that adapt when plans change. The next challenge is connecting providers so disruption does not become the traveller's problem to solve alone. Real-time information, coordinated alternatives and clear accountability can turn reliability into differentiation.

07

Stop Chasing High-Value Travellers. Start Creating High-Value Trips.

A high-spending visitor does not automatically generate the greatest destination value. Timing, local expenditure, economic retention and pressure on infrastructure all matter. The next measure of tourism success must capture the value each trip creates, not just what visitors spend.

08

AI Could Redraw the Map of Tourism Winners and Losers.

With 31% of surveyed generative AI users reporting use for travel planning and booking in 2026, the rules of discovery are changing.[1] As AI increasingly mediates travel decisions, destinations and businesses face a critical challenge: remain visible, bookable and differentiated without surrendering the traveller relationship.

09

In an Age of Disruption, Confidence Becomes Part of the Product.

With 72% of surveyed travellers concerned about geopolitical instability, confidence increasingly shapes travel decisions. Flexible terms, credible alternatives and effective disruption support are no longer merely operational considerations. They are becoming important elements of the tourism value proposition.

10

Tourism's Biggest Opportunities Lie Beyond Tourism.

Travellers experience destinations as one place, but the industry operates across fragmented systems. Unlocking greater value requires new alliances connecting tourism with technology, mobility, healthcare, culture, finance and communities. The destination ecosystem, not individual assets alone, becomes the strategic priority.

INTRODUCTION

The future traveller is not a person. It is a moment, and that moment keeps moving.

International tourist arrivals reached an estimated 1.52 billion in 2025, 4% more than the year before. Yet growth figures alone reveal little about how travel decisions are shaped. Rising costs and geopolitical uncertainty are changing what travellers can afford. Children, creators and AI are influencing which destinations enter consideration, often before formal planning begins. Meanwhile, retirement, flexible work and evolving family structures are reshaping when and for how long people travel. Understanding demand therefore requires looking beyond who travellers are to the circumstances shaping each trip.

Fixed traveller personas alone can no longer adequately explain these choices. The same person can be value-conscious on one trip and a premium buyer on the next, a solo traveller in spring and a family organiser in summer.

THE UNIT OF DEMAND

The travel moment

Five elements come together around a specific trip to define 'The Travel moment'

- **Purpose** — Why this trip
- **Budget** — What it can cost
- **Companions** — Who comes along
- **Schedule Flexibility** — When and how long
- **Source of Inspiration** — What sparked it

↑ Three forces shape every moment

01 Affordability
Shapes **what is possible**

02 Influence
Shapes **what enters consideration**

03 Time wealth
Shapes **when people travel, for how long and with whom**

Traveller demand is becoming more dynamic and situational, while much of the tourism ecosystem still plans, markets and delivers through fixed segments, products and operating models. That gap is increasingly becoming a commercial risk: it affects which destinations enter consideration, how products are designed and distributed, where investment flows and how much value remains in the place.

The report looks towards 2030, drawing on the latest evidence from 2025 and 2026.

Section 1 examines the three forces reshaping demand.
Section 2 shows how they change what travellers want from a trip, from living culture to measurable local value.
Section 3 follows the journey itself and the expectations now attached to it.
Section 4 turns these findings into an agenda for a future-ready tourism ecosystem.

The question for every destination and business is the same. Not who the traveller is, but what is shaping this traveller, on this trip, right now.



1.0 The Future Traveller:
A Profile in Constant Flux

The future traveller is no longer defined by a fixed persona.
Demand is increasingly shaped by the circumstances surrounding each trip.

Global tourism has entered a new phase of growth, but the scale of recovery masks a more fundamental shift in the drivers of demand. International tourist arrivals reached an estimated 1.52 billion in 2025, 4% more than in 2024.[3] Yet volume alone no longer explains where demand is heading. Economic and geopolitical volatility is redefining which trips remain viable and at what cost. Demographic change is shifting who holds time and spending power. New systems of influence, from creators and online communities to AI, are changing which destinations enter consideration. As a result, three forces are reshaping each travel moment. **Affordability** is becoming a live calculation as prices, connectivity and geopolitical shocks change what remains viable. **Influence** is moving upstream as children, creators, communities and AI shape desire before formal planning begins. **Time wealth** is growing in value as older travellers, flexible workers and multigenerational households gain greater control over when and how long they travel.

Euromonitor forecasts international trips, measured as outbound departures, to rise from about 1.54 billion in 2025 to 1.85 billion in 2030, an increase of roughly 20%. This expanding market makes understanding the circumstances behind each trip increasingly important.[4]

As a result, age, income and life stage have become weaker predictors of behaviour on their own. The same person can make very different choices from one trip to the next. A US study by SkiftX and Amazon Ads shows that the same person may take a solo wellness retreat, a concert weekend and a family road trip, each with a different motivation and discovery channel.[5] Indeed, it is now essential to treat the travel moment, rather than the traveller profile, as the unit of demand.

1.52 Billion International tourist arrivals in 2025.[2]

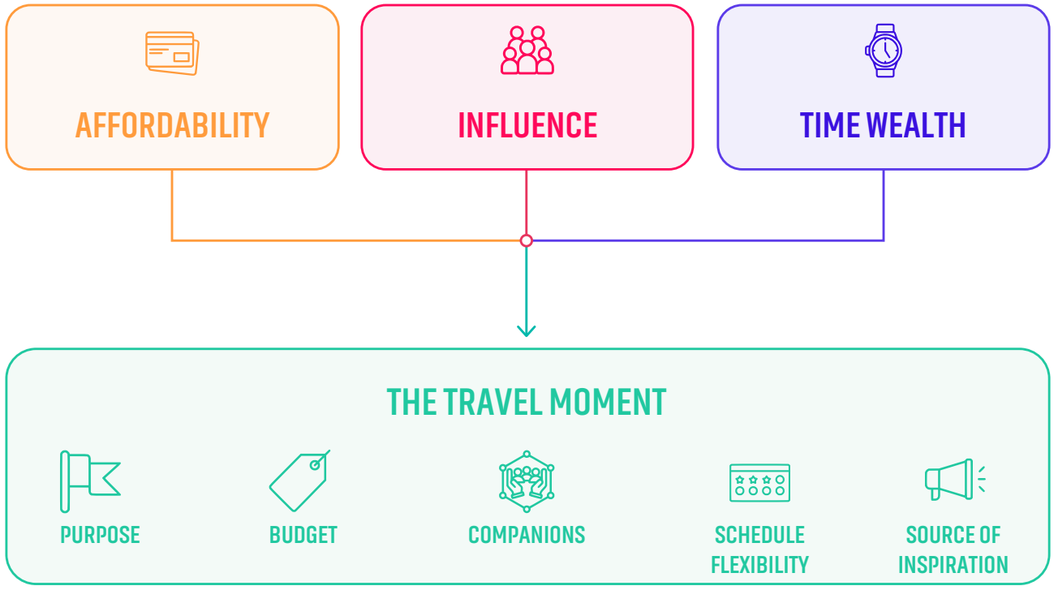
48% of surveyed travellers across 14 markets add solo days before or after a family holiday.[6]

59% of surveyed EMEA travellers have paired a longer holiday with a short luxury stay.[7]

29% of surveyed EMEA travellers believe that upgrading to luxury accommodation for part of their trip gives them access to experiences that they could not afford for the entire trip.[7]

The Three Forces

Age, income and life stage remain useful for sizing demand, but they do not explain a trip on their own. Together, affordability, influence, and time wealth inform five parts of the travel moment:



The central question therefore shifts from

“Who is the traveller?”

to

“What is shaping this traveller’s decisions, on this trip?”

This shift in travel decision-making has direct commercial implications. For destinations and travel businesses alike, growth will depend on understanding the specific needs, constraints and drivers shaping each trip rather than relying on fixed traveller personas. The following subsections examine how affordability, influence and time wealth are redefining demand.

1.1 The Future Travel Wallet: A Real-Time Value Equation

In a volatile environment, travellers are protecting the reason for the trip, then rebuilding everything else around it in real time.

The first shift in this value equation is the expansion and eastward rebalancing of the global travelling class. By 2030, nearly 150 million additional households are projected to have sufficient discretionary income for international leisure travel, with almost 110 million of these households in Asia Pacific.[8] This will widen access to international travel and increase the importance of Asian source markets in future demand. Euromonitor's Passport estimates show the same shift: the number of households with disposable income above USD 25,000 is forecast to grow by around a quarter by 2030, with Asia Pacific adding more than all other regions combined. At higher incomes the picture is more balanced, as North America and Western Europe still hold about two-thirds of households above USD 75,000.[9]

The international trip forecasts also point to a shift in where demand originates. Outbound departures from Asia Pacific are forecast to grow by about 6% a year between 2025 and 2030, accounting for around 41% of the global increase. Western Europe is expected to remain the largest origin region, growing by about 2% a year, although its share of global departures falls from about 36% to 34%. Departures from Middle East and Africa are forecast to grow by about 4.6% a year.[10]

X2 growth in jet fuel prices between February and April 2026.[11]

Travel costs have also become more volatile, with airfares providing the most direct transmission to travellers. The closure of the Strait of Hormuz on 28 February 2026 disrupted refinery output in the Middle East and constrained global crude oil supply, contributing to a near doubling of jet fuel prices. The gap between jet fuel and crude oil prices, known as the crack spread, reached a record USD 80 per barrel in April. Although the price spike has since eased, jet fuel prices remain above 2025 levels. This has significant implications for airlines because fuel is one of their largest operating costs. Higher prices raise the cost of each flight, while longer routings and airspace restrictions increase fuel consumption further and reduce effective capacity. Even so, the International Air Transport Association expects global passenger traffic to continue growing in 2026, albeit at a slower pace,[12] pointing to a moderation in demand rather than a collapse.

54% of surveyed US travellers were cutting spending elsewhere to maintain travel plans in Q2 2026.[13]

To date, travellers have been adapting their trips rather than abandoning them. This is less a reduction in overall travel spending than a reallocation and reprioritisation of the travel wallet towards the experience that gives the trip its purpose. Travellers are cutting back elsewhere in their lives or trading down on less defining parts of the journey to protect that experience. More than half of US travellers surveyed in Q2 2026 were reducing spending in other areas of life to maintain their travel plans.[14] Euromonitor's 2026 Lifestyles Survey suggests travel remains a relative priority within consumers' wider budgets globally: 26.5% of respondents planned to increase travel spending over the next 12 months, compared with 21.7% planning cuts. By contrast, more consumers planned cuts than increases in spending on restaurants, cinema, concerts and theatre, and novelty experiences.[15] These comparisons concern broad consumer spending categories, rather than how travellers allocate their budgets within a trip.

Within the trip itself, evidence from Asia Pacific illustrates a second level of trade-off: travellers under budget pressure said they would be more likely to reduce spending on flights and accommodation than on experiences.[16] The travel wallet is therefore becoming more selective: flights, accommodation and trip length may be adjusted, while spending is prioritised towards the defining experience. The result is a fragmented travel wallet. Travellers economise on access and spend more on the experience that justifies the trip, such as pairing a budget flight with a premium dining experience. Premiumisation can therefore happen within a single trip, including among travellers who would not be classed as luxury consumers. This favours destinations and experience providers that offer clear price ladders, so travellers trade down on some elements without abandoning the trip.

Affordability is creating a more layered and regional travel map rather than a wholesale retreat from long-haul travel. Across 11 EMEA markets, the average surveyed traveller planned five holidays in 2026: two domestic trips, two short-haul breaks within a 4-hour flight and one long-haul journey.[17] A similar preference for proximity is visible in Asia Pacific, where, according to Visa's 2026 Global Travel Intentions study, 63% of surveyed travellers had travelled within the region. This does not mean travellers are simply choosing the nearest option: 37% of Asia Pacific respondents planned trips around distinctive local experiences, above the global average of 29% .[18] Secondary destinations are also gaining consideration as travellers seek better value and greater distinctiveness. Across Asia, searches for secondary destinations on Agoda grew 15% faster than searches for established hubs over the two years to mid-2025, and these destinations accounted for 34% of all accommodation searches in the first half of 2025.[19] Lower cost was the leading motivation identified, alongside local culture, outdoor activities and promotions. Euromonitor's 2026 Travel and Loyalty Survey also points to a domestic base globally: 77% of respondents had taken at least one domestic personal trip, compared with 48% who had taken an international one. Meanwhile, 27% take day trips at least monthly.[20] Together, the evidence suggests an emerging cross-regional pattern: travellers are building a portfolio of more frequent nearby trips, including accessible secondary destinations and more selective long-haul journeys.

The opportunity is to win a role in that portfolio, whether as the easy regional trip, the better-value alternative or the experience worth travelling farther for.



1.2 The Future Travel Influence: Starting before the Search

A trip can now be inspired, shaped and sold before the traveller ever searches for a destination, making who or what inspires the trip as consequential as who pays for it.

The experience-first mindset is not a generational divide. Millennials helped pioneer it, and real-world experiences matter in similar proportions across every adult generation. In Euromonitor's 2026 Travel and Loyalty Survey, the share of respondents who agreed that they value real-world experiences was similar across all four adult generations:

73% of Gen Z respondents

76% of millennial respondents

77% of Gen X respondents

76% of baby boomer respondents

The similarity is the insight: the generational difference lies less in whether experiences matter and more in how travel desire is formed and converted into a booking.[21]

Generational differences are more evident in how brands earn loyalty and in willingness to pay. Among respondents answering the loyalty questions in Euromonitor's 2026 Travel and Loyalty Survey, 17% of Gen Z respondents named immersive experiences among the most important ways a brand can earn their loyalty, compared with 4% of baby boomers, and 19% of Gen Z respondents cited brand communities, compared with 6% of baby boomers. Among respondents willing to pay more for relaxation, 52% of Gen Z would pay at least 30% extra, compared with 14% of baby boomers.[22]

Younger travellers often discover destinations through their interests and communities before any search begins. In the UK, those aged 18-24 were more than twice as likely as those aged 45-54 to use social media for holiday inspiration in 2025.[23] Creators, films, games, sport and online communities can build a preference for a place long before a trip is planned.

Influence is entering the household before purchasing power does. Research across 11 markets, and separately in the US, shows children shaping family destination choices and requesting trips inspired by film, television, games or celebrities.[25] Children can therefore place a destination on the family shortlist even when adults still control the budget and final booking.

AI is adding a further layer of influence, helping travellers discover destinations, compare possibilities and shape an itinerary before a final purchasing decision is made. Its growing role in the journey does not necessarily mean that travellers are ready to delegate every decision or transaction to an AI assistant. For choices carrying greater cost or risk, established travel brands and personal sources of influence such as family continue to provide reassurance and validation.[26] In the near term, AI is therefore more likely to expand how travel ideas are formed and evaluated than to replace trusted providers at the point of purchase.[27]

Creators are also moving closer to the transaction, even though the people who inspire, plan and pay for a trip may still be different. Expedia Group's Travel Shops allow creators to turn recommendations into bookable storefronts.[28] A creator may spark the trip, an AI tool may help assemble it and a parent may still pay, but the distance between inspiration and a bookable option is shrinking.

76% of parents of Gen Alpha children said their children held strong sway over international destination choice.[24]

Destinations are using existing interest as an entry point. The Singapore Tourism Board's **Travel Outside Your Algorithm campaign** encouraged well-known Australian personalities to explore beyond their usual interests.[29] Saudi Arabia's **I Came for Football, I Stayed for More** campaign similarly used football to showcase motorsport, esports, boxing, culture and the wider destination.[30] Both campaigns attract travellers through one interest and then broaden the journey.

The implication for destinations is that influence is compressing the path from inspiration to purchase. A creator's post, an AI recommendation or an entertainment franchise can introduce travellers to a destination and shape their itinerary. Increasingly, it can also lead directly to something bookable. Destinations therefore need to build cultural relevance before formal search begins, make their offer legible to AI systems and be ready to convert interest when it peaks.



1.3 Time Wealth: Moving from an Age Cohort to a Trip Condition

The most valuable traveller may be the one who can travel when others cannot.

Time wealth is not confined to a particular age group: retirement, flexible work and multigenerational travel can each give a traveller greater control over when to travel, how long to stay and how much to fit into each day.

Euromonitor's 2026 Travel and Loyalty Survey highlights generational differences in travel patterns. Millennials and Gen Z each selected an average of 1.8 travel companion types, excluding solo travel, compared with 1.3 among baby boomers. Among international leisure travellers, Gen Z reported travelling in an average of 2.2 separate months during the previous year, compared with around 1.9 among baby boomers.[31] These patterns do not, however, establish how much flexibility travellers have to choose when to travel or how long to stay.

1 in 6 people worldwide will be aged 60 or over, equivalent to around 1.4 billion people in 2030 and rising to 2.1 billion by 2050.[32,33]

Their economic weight is even greater: people aged 60 and over account for around 15% of the global population in 2026 but an estimated 27% of consumer spending.[34,35] That spending power is backed by concentrated assets in some mature markets. In the US, baby boomers hold at least USD 93 trillion in assets,[36] more than Gen X and millennials combined. While this is a US measure, and wealth remains highly uneven within the cohort, it helps explain why older travellers can finance and shape trips beyond those they take alone.

However, age is not a proxy for affluence. Euromonitor's 2026 Travel and Loyalty Survey shows that older consumers are more value-led than younger ones. Valuing experiences is not the same as paying for them: baby boomers value real-world experiences in similar proportions to younger generations, yet only 46% agreed that it is important to spend money on them, compared with 59% of Gen Z and 60% of millennials. Among baby boomers in loyalty programmes, 65% do so for discounts or offers, compared with 39% of Gen Z.[37] Wealth in later life brings purchasing power, but not always a willingness to spend.

What older travellers usually hold in greater supply is time. That translates into longer stays, off-peak travel and a slower pace. Across 10 European markets, travellers aged over 55 are twice as likely as those aged 18-24 to plan stays of more than 12 nights.[38] Across different trips, they act as guests, decision makers, organisers and sponsors.

Control over the calendar matters as much as trip length. Across 14 markets, half of surveyed travellers said they would accept a pay cut for unlimited leave, while 60% would take an extended break from work to travel for months or years.[39]

Euromonitor's 2026 Travel and Loyalty Survey shows differences in travel timing by generation. Among international leisure travellers, baby boomers have the highest proportion travelling in September (23%) compared with other adult generations.[40] In July and August, the proportions travelling are highest for Gen Z (22% and 25%, respectively) and lowest for baby boomers (16% and 17%) compared with other adult generations. Respondents could select more than one month, explaining why overall shares would exceed 100%.[41] For destinations, the relevance lies in timing. A traveller able to shift a trip into off-peak periods can fill capacity that peak-only demand cannot, making schedule flexibility a form of travel value.

Peak and quietest travel months by generation, 2026

GENERATION	PEAK MONTH	QUIETEST MONTH
Gen Z	August, 25%	May, 14%
Millennials	August, 22%	February, 13%
Gen X	August, 21%	February, 11%
Baby boomers	September, 23%	January, 9%

Source: Euromonitor International, Voice of the Consumer: Travel and Loyalty Survey, 2026. Note: Share of each generation's international leisure travellers who reported travelling in that month. Respondents could select more than one month, so shares do not sum to 100%. Gen Alpha is excluded because of its small sample size.

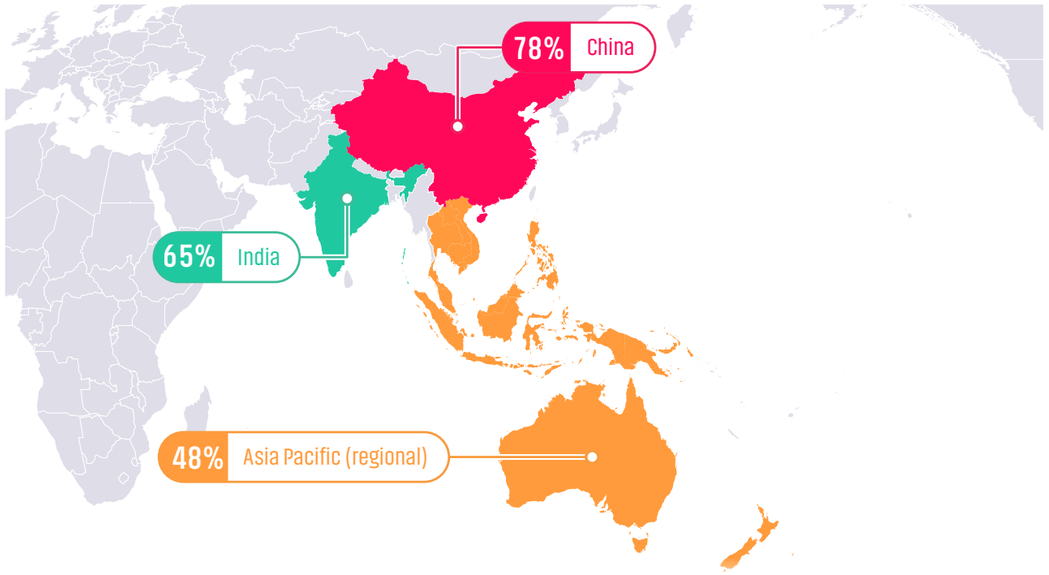
This also implies that time wealth is extending beyond retirement and older age brackets, chiefly through two routes. The first is flexible work. In 2025, 18.5 million US workers, around 12% of the workforce, described themselves as digital nomads, staying an average of 6.4 weeks in each location.[42] This remains a niche, self-reported US measure. It nevertheless shows that extended travel is becoming less tied to retirement, and mainstream travel products are adding slow-travel features in response, as travellers are seeking deeper engagement with destinations and communities.[43]

Family travel is the other route, spreading older travellers' time and spending power across generations. Hilton's 14-market research found that 53% of adults travelling with children included at least one adult child.[44] Across Asia Pacific, 60% of Hilton survey respondents had taken or planned a skip-generation trip, in which grandparents travel with grandchildren. In addition, 48% of families travel with three or more generations at least once a year.[45]

Family travel is also extending older consumers' economic influence across generations. Globally, 44% of parents travelling with adult children paid for the entire trip.[46] Grandparents are contributing directly too: in the US, they spent an average of USD 5,205 on multigenerational family travel in 2024.[47] Together, the findings show how one traveller's time and spending power can enable participation across a wider family group.

Older travellers therefore shape demand as travellers, organisers and sponsors, often approving and funding a trip whose initial appeal was shaped by younger family members.

Families travelling with three or more generations at least once a year, 2026



Source: Hilton, 2026 Trends Report (Asia Pacific). Note: Comparable results using the same measure were not available for other regions.

Euromonitor's 2026 Travel and Loyalty Survey provides a related measure of travel with parents: 42% of Gen Z respondents and 67% of Gen Alpha respondents said they travel with their parents, compared with 20% of millennials and 10% of Gen X. The Gen Alpha result is directional since it is based on a small sample.[48]

Tourism has long been measured through disposable income, but control over time is becoming an equally important determinant of trip length, timing and pace. The commercial opportunity therefore extends beyond an age-based segment. The same traveller may be time-constrained on one trip and time-rich on another, depending on work, companions and the purpose of the journey. Destinations and businesses that make longer stays, flexible pacing and mixed-age itineraries easy to book can serve these different travel moments across a wider market.

By 2030, knowing who travels will no longer be enough. The advantage will come from understanding why this trip, with these companions, at this time, and what the traveller will protect. Destinations should begin building demand intelligence around those moments now.

The forces shape not only who travels and when, but also what travellers seek from the journey. Sections 2 and 3 examines four behavioural shifts emerging from this change.

From the forces shaping demand to what travellers seek

FORCE SHAPING DEMAND	HOW IT SHAPES THE TRIP	WHAT TRAVELLERS SEEK
Affordability	Protecting the defining experience →	**Experiences worth paying for** Credible value in living culture and wellness. Sections 2.1 and 2.3
Influence	Discovery before formal search →	**Offers they can find, trust and book** Through AI, creators and familiar brands. Section 3.1
Time wealth	Greater flexibility in timing, duration and pace →	**More scope to explore and adapt** Places beyond established hubs and stays that respond as needs change. Sections 2.2 and 3.3

Across all three: expectations that span the journey

Journey continuity
Fewer repeated processes, reliable connections and clear information across providers.

Section 3.2

Booking confidence
Flexible terms, viable alternatives and accountable support when plans change.

Section 3.4

Visible local benefit
Clear evidence of who benefits locally and what spending supports.

Section 2.4

These connections are illustrative, not exclusive; the forces interact across travel moments.

2.0 The Future Traveller: Travel that Creates Lasting Value

Travellers increasingly expect a trip to deliver an outcome beyond the immediate stay: deeper connection, improved wellbeing or value that is visibly delivered to the host destination.

Travel remains a source of pleasure, escape and discovery, but the value travellers seek from it is expanding. They may want to participate in local life rather than observe it, return feeling restored, or understand more clearly how their spending supports the place they visit.

These motivations do not define every traveller or every trip. They change with affordability, influence, available time, purpose and companions. The same traveller may seek cultural connection on one journey, recovery on another and a visible local contribution on a third.

For destinations, the opportunity is to translate these expectations into more durable value: living culture sustained by residents, longer stays and local spending in lesser-known places, wellness offers matched by credible capability, and responsible choices that create visible benefits for the host destination.

Four shifts show where this opportunity is emerging. Living culture creates deeper participation and engagement. Lesser-known destinations retain more value when they earn an overnight stay. Wellness moves from an amenity to a destination capability as the promise becomes more specialised. Responsible tourism gains meaning when local benefit is visible and measurable.

2.1 Local Immersion as the New Cultural Tourism Premium

The cultural premium lies in living heritage, with residents at its core and travellers invited to participate in, contribute to and co-create the experience.

Destinations have spent two decades turning culture into something visitors can actively participate in. Cooking classes, craft workshops, farm visits and supper clubs have brought travellers closer to local life and created new sources of income. Their success has also made these formats easy to copy. Many have become standard products that can be reproduced without the people, places and knowledge that once gave them meaning. In some historic centres, the shift towards a visitor-only economy has also displaced local businesses and residents, eroding the distinctiveness that attracted visitors in the first place. Participation alone therefore no longer sets a destination apart.

Living culture offers a stronger proposition. It connects participation to residents who practise the culture beyond tourism, the businesses and spaces that sustain it, and the knowledge and relationships that give it meaning. A traveller may participate for a few hours, but the source of the experience remains rooted in the destination. This context makes it harder to copy.

64% of surveyed respondents said experiencing cultures other than their own was important.[49]

Beyond broad interest, cultural immersion can also command a price premium. Among respondents willing to pay more for it, 36% overall and 48% of Gen Z respondents would pay at least 30% extra.[50]

Local guides, food producers, craftspeople, performers and organisers turn cultural assets into experiences that can command time and spend. Peru's national community tourism strategy, for instance, has supported 80 community-based organisations and around 2,500 entrepreneurs since 2010 to design and operate experiences around farming, fishing, craft and local culture.[51] In AlUla, Madrasat Addeera connects visitors with practitioners working in palm weaving, clay and textiles.[52] The next opportunity is to scale such experiences so that more visitor spending stays with the people who deliver the experience.

Success stories from Australia and Canada have brought this opportunity to life. Tourism Australia's Discover Aboriginal Experiences collective brings together more than 50 businesses offering over 200 experiences led by Aboriginal guides; close to 1.25 million international trips included an Indigenous experience in the year ending March 2026, up by nearly 7% from the previous year.[53] In Canada, Indigenous tourism generated an estimated CAD 3.7 billion in revenue in 2023, directly contributed CAD 1.6 billion to GDP and supported approximately 34,700 jobs.[54]

CAD 3.7 Billion revenue generated by Canada's Indigenous tourism sector in 2023, directly supporting approximately 34,700 jobs.[55]

As culture becomes more integral to the visitor economy, effective cultural stewardship becomes increasingly important. Practitioners and communities should play a central role in determining what may be shared, how it is interpreted, where appropriate boundaries are established and how value is distributed. Destinations should strengthen the cultural ecosystem underpinning these experiences through practitioner development, local procurement and the safeguarding of cultural knowledge. Their long-term advantage lies in enabling travellers to engage with a living culture sustained by its communities and economy.

2.2 The Overnight Opportunity for Secondary Destinations

Secondary destinations will redraw the tourism map when they convert visitor interest into overnight stays through compelling experiences, suitable accommodation and access adapted to the place.

"Secondary" describes a destination's current position in an itinerary, not its permanent value. The same place may be an optional detour for one traveller, an overnight stop for another, and the main purpose of a third journey.

Overcrowding, affordability and the search for distinctiveness are directing attention beyond established hubs. Across 35 markets, 43% of surveyed travellers planned to avoid overcrowded destinations in 2026. Yet, attention alone does not spread value. A day trip may move visitors while leaving accommodation revenue and much of their spending in the gateway. The value changes when the visitor stays overnight.

43% of surveyed travellers across 35 markets planned to avoid overcrowded destinations in 2026.[56]



A lesser-known place can progress through three positions:

From an optional detour to a reason to travel

THE PLACE'S ROLE IN THE ITINERARY

01 · Detour
A reason to add it
Discoverable and easy to add to an established itinerary.

02 · Overnight stop
A reason to stay
A compelling experience, suitable accommodation and activities beyond the main attraction.

03 · Destination in its own right
A reason to make the journey
A coherent proposition, reliable access and capacity suited to the place sustain demand beyond one attraction or season.

Three demand routes can support this progression

Proximity-led demand
An easy addition to an existing trip.

Purpose-led demand
A cultural, culinary, sporting or natural experience that shapes the itinerary.

Climate- and calendar-led demand
Relevance through better conditions, value or availability.

These positions can coexist for different travellers.
Progression should suit local capacity and priorities; some places are better served by day visits.

Spain's 2026 total solar eclipse shows how quickly a specific purpose can change the map. Ahead of the event, international hotel bookings in smaller cities along the eclipse path had increased by 383%.[57] The longer-term opportunity is to turn event-led attention into repeat reasons to stay.

Whatever initiates demand, earning the night requires the same foundations: a compelling reason to remain, manageable access and infrastructure suited to the place. Manageable access does not have to mean a frictionless journey. A mountain road, walking route or locally operated transfer can strengthen the experience when it is clearly explained and reliably arranged. Investment should support the proposition and remain useful to residents beyond peak periods.

Japan's Hida Furukawa is a case in point. Reached by limited-express train from Nagoya, this small mountain town offers small-group cycling tours led by local guides through the surrounding farming villages, with overnight stays in traditional farmhouses.[58]

Each route can move a place from optional detour to overnight stop and, ultimately, a destination. Secondary destinations should establish the reason to stay before building for scale. Where appropriate, converting day visitors into overnight guests can substantially increase the value retained locally. Not every place should pursue it, however. Some destinations are better suited to day visits because of environmental limits, accommodation capacity or proximity to larger hubs. For these destinations, increasing local spending and encouraging repeat visits may be more appropriate goals than attracting overnight guests.

2.3 Wellness Tourism: Capability Defines the Credible Offer

As wellness offers become more specialised, destination capability increasingly determines what can be promised and delivered credibly.

Wellness demand is broadening. At the forecast growth rate of 6.1% a year, wellness tourism spending would reach around USD 141 billion by 2030. Growth alone, however, is not the strategic shift. Euromonitor's 2026 Lifestyles Survey shows that more consumers planned to increase health and wellness spending than reduce it. Travel is increasingly used to restore energy, improve sleep, address burnout and support long-term wellbeing, influencing choices across destinations, accommodation, food and activities. In Euromonitor's 2026 Travel and Loyalty Survey, relaxation, a destination feature that includes spa and wellness alongside sun, water and beach, was the most frequently selected feature, chosen by 25% of respondents. Among those willing to pay more for it, 37% would pay at least 30% extra.[60] As wellness moves beyond traditional retreats and spa holidays, destinations must determine which outcomes they can credibly support. This becomes more important as diagnostics, recovery technologies and longevity protocols move into hospitality settings, raising the expertise, evidence, oversight and care required to deliver each promise.

Wellness is moving from a tourism product to a destination capability. Almost any destination can support general wellbeing, but moving into structured programmes, diagnostics, longevity services or medical care requires deeper expertise, evidence, regulation and systems of care.

These offers are better understood as distinct propositions rather than stages in a natural progression. They may coexist within the same destination ecosystem, but they respond to different motivations, purchasing journeys and risk considerations:

Wellness-supported travel

Integrates sleep, nutrition, movement and restoration into the wider trip. Travellers primarily seek to feel better, and delivery depends on thoughtful hospitality, accessible environments and consistent service.

Structured wellness programmes

Organise the stay around an objective such as stress recovery, mobility, fitness or sleep. They require qualified practitioners, credible methods, appropriate assessment and support after departure.

Medical and procedure-led travel

Is driven by a need for diagnosis, treatment or clinical intervention. It includes diagnostics, rehabilitation, fertility care and cosmetic procedures, and requires licensed facilities and practitioners, clinical governance, informed consent, data protection, provider insurance, emergency protocols and aftercare.

These propositions can overlap, particularly where hospitality settings incorporate diagnostics or clinical expertise. They are not, however, one continuous consumer trend. A traveller seeking better sleep, a traveller purchasing longevity diagnostics and a patient travelling for surgery require different levels of trust, evidence and regulation. Nor is medical tourism the natural progression of wellness tourism. Some destinations will create greater value by specialising in wellbeing without a clinical offer, while others may build competitive medical tourism sectors without a broader wellness proposition.

Travellers may move between these propositions from one trip to another. Income influences the format and intensity of the offer rather than determining whether wellbeing matters. In a 10-market survey conducted in mid-2025, 58% of higher-income respondents had booked or were considering a wellness holiday in 2026, compared with 26% of lower-income respondents.[61] A value-conscious traveller may protect one wellness experience within a wider trip, while a higher budget may open access to longer programmes, diagnostics or specialist care.

Spain's SHA Wellness Clinic illustrates a structured wellness offer, offering 7- and 14-night stress-management programmes that combine medical consultations, therapies, nutrition, breathing techniques and stress-management sessions.[63] At the more clinically intensive end of the offer, RAKxa's 7-night Integrative Longevity Programme in Bangkok makes the required capability visible. It combines a medical consultation, laboratory diagnostics, individual assessments, personalised planning and follow-up, with an average of seven specialists and staff supporting each guest.[64] Standards rise as an offer becomes more clinically intensive. South Korea illustrates the destination-wide capability required.

A record 1.17 million foreign patients received treatment in the country in 2024, nearly double the previous year, within a system that has allowed registered medical institutions to attract international patients since 2009.[65] Dermatology accounts for more than half of these visits, but the broader strategic advantage lies in the regulation, clinical oversight, insurance, patient support and aftercare required across medical procedures.

Destinations should compete only at the level their expertise, regulation, insurance and care systems can safely support. Entering more clinically specialised services is a strategic choice rather than a goal in itself. Many destinations will create more value by excelling at wellness-supported travel or structured programmes than by entering medical care, which may not suit their market, regulation or identity.

USD 105 Billion

global wellness tourism expenditure in 2025, up by nearly 10% year on year and expected to grow at a compound annual growth rate (CAGR) of 6.1% for the period 2025-2030.[59]

34%

of consumers intended to increase their spending on health and wellness, compared with 9% who intended to reduce it.[62]

"The next generation of wellness destinations will not just be defined by the facilities they offer, but by the ecosystems they build around health, expertise and trust." **- Ingo Schweder, Chief Executive Officer, GOCO Hospitality**

2.4 Credible Choices and Measurable Local Value in Responsible Tourism

Responsible tourism must work at two levels: travellers need credible, accessible choices that deliver a valued experience, while destinations need measurable benefits for residents, local businesses and the assets on which tourism depends.

Travellers increasingly want their trips to contribute to the places they visit. This remains an intention rather than guaranteed booking behaviour, but it signals that personal enjoyment and positive local impact can form part of the same travel decision.

69% of respondents across 35 markets said they wanted to leave destinations better than they found them.[66]

Euromonitor's 2026 surveys provide perspectives on attitudes and stated travel preferences. In the Lifestyles Survey, 51% of respondents agreed that their choices and actions can make a difference to the world.[67] In the Travel and Loyalty Survey, 5% selected eco-tourism or sustainable travel options as a destination feature they look for, and 3% said they would pay more for them. These findings however, do not track how individual attitudes translate into bookings.[68]

The first test comes at purchase. A responsible option must be easy to find, credible in its claims and worthwhile as an experience. Labels such as "eco-friendly" or "community-based" carry limited weight when travellers cannot see who benefits or what their spending supports. Standards such as those of the Global Sustainable Tourism Council can establish a common baseline, but proof still needs to appear at product level.[69]

29% increase in CopenPay-linked bike rentals during the 2024 pilot. The programme expanded from 24 attractions in 2024 to over 100 in 2025.[70]

Copenhagen's CopenPay turns intent into action by rewarding visitors for cycling, using public transport or joining clean-ups.[71] The programme shows the same principle: responsible choices gain traction when they are visible, simple and rewarding.

7 in 10 CopenPay participants reported changing their behaviour after returning home.[72]

The second test is where the value goes. Nepal's Community Homestay Network, for instance, publishes a revenue-sharing model in which 80% of each traveller's payment goes directly to host families and communities.[73] Canada's Fogo Island Inn takes this transparency further through an Economic Nutrition label showing where each guest dollar goes. More than half remains on Fogo Island, 96% stays in Canada and operating surpluses are reinvested in the community.[74] Local benefit becomes something the traveller can understand and the operator can measure.

Showing where one booking goes is the first level of accountability. Destinations must then assess the combined effect of tourism across the place. Visitor spending may create jobs and support local businesses, while the costs of growth are carried by other residents through congestion, housing pressure, strained services or reduced access to shared spaces. Total spend therefore cannot show whether tourism is strengthening the destination. The real test is who captures the value, who absorbs the pressure and whether public services, natural resources and cultural assets can continue supporting residents and future visitors.

Taken together, these shifts expand the value that travel can create. Travellers may seek deeper cultural participation, improved wellbeing and clearer evidence of positive local impact, while destinations benefit from longer stays, wider local spending and stronger community participation.

Responsible tourism must ultimately pass two tests: whether travellers can act on their intentions, and whether the destination retains enough value to justify the pressure tourism creates. It should therefore be judged not only by the choices travellers make, but by the benefits destinations retain and the costs residents bear.

By 2030, the competitive question will not be how many experiences a destination offers, but what those experiences leave behind: a living culture with an economy of its own, value retained beyond established hubs, credible wellbeing outcomes and measurable benefit for host communities. The capabilities and measurement systems behind those promises must be built now.

The next challenge is to make the journey itself capable of delivering these outcomes consistently, from planning and booking through arrival and the stay, including when a cancelled flight, extreme weather or another disruption forces plans to change.



3.0 The Future Traveller: Expectations of an Adaptive Journey

Travellers increasingly expect the journey to remove work that adds no value, adapt as their plans change and preserve their control over the decisions and experiences that matter.

Euromonitor forecasts global online booking value to rise from about USD 2.10 trillion in 2025 to USD 2.86 trillion in 2030, an increase of about 36%. The online share of total booking value is expected to rise more modestly, from about 69% to 71%. Yet a booking made online does not necessarily connect the services behind a trip.[75]

Travel services have become easier to find and book, yet the overall travel experience remains fragmented. Travellers still have to provide the same information to multiple providers, coordinate connections, update several bookings when plans change and work out who is responsible when something goes wrong.

As digital assistance becomes more familiar, travellers increasingly expect continuity. They want information they already provided to move with them across services, itineraries that can keep up with shifting conditions in real time and help that remains clear and reliable when plans are disrupted.

Technology can support this continuity, but it cannot deliver it alone. AI may suggest an alternative, but providers still need to share the right information, coordinate booking changes and decide who is responsible when one part of the journey is disrupted. The traveller expects one journey, but the industry still often manages it as separate transactions.

Selective seamlessness is the guiding principle: travellers do not need every step of the journey to be instantaneous. Security checks, timed access to fragile places, slower local routes and guided encounters can protect destinations or enrich the experience. By contrast, repeated forms, conflicting updates, disconnected handovers and uncertainty about where to turn for help add no value and should be eliminated.

Travellers can express what they need, but delivering a journey that adapts to those needs requires destinations and providers to coordinate data, infrastructure, inventory and operations, with clear responsibility for delivery. Four areas are central to this response: AI, mobility, hospitality and resilience planning.

- **AI keeps the journey responsive,** helping travellers plan, book and adapt their trip as circumstances and preferences change.
- **Mobility becomes a question of fit,** reducing administrative delays while ensuring physical access suits the destination and its experience offering.
- **Hospitality becomes the local anchor,** using technology to adapt the stay, while staff and local partnerships make the stay feel rooted in the destination and in human connections.
- **Resilience planning becomes part of the offer,** providing flexible terms, clear information, viable alternatives and accountable support when disruption affects the journey.

Together, they move the journey from a sequence of transactions towards a system that can adapt without making every trip feel the same.

3.1 From Planning a Trip to Managing a Journey

As travellers adopt AI-assisted planning, the next opportunity is assistance that continues throughout the journey while leaving consequential decisions to the traveller.

31% of surveyed generative AI users globally used it for travel planning and booking in 2026.[76]

AI is becoming part of travel planning. In 2026, 31% of surveyed generative AI users globally reported using it for travel planning and booking. The proportion was 29% among Gen Z users, 34% among millennials and 31% among both Gen X and baby boomers. More broadly, 59% reported using generative AI to seek information or recommendations, a measure not specific to travel.[77] This proportion was 54% among Gen Z users, 57% among millennials, 65% among Gen X and 67% among baby boomers. These findings reflect self-reported use, not verified bookings.[78] Industry forecasts suggest that AI agents could play a growing role in travel discovery and booking. If these forecasts hold, AI will increasingly shape which destinations and products travellers see.[79]

The deeper shift is from a planning tool to a travel companion. A traveller could use the same system to compare destinations, build an itinerary, adjust it after a delay, find an experience nearby and reshape the following day around weather, energy levels or a change of interest. The commercial opportunity therefore extends beyond helping travellers choose, and toward helping them manage the journey as conditions, needs and preferences change. There are early signs of demand for this support wherein, 64% of consumers surveyed in 2025 said they would pay for an AI assistant providing information during the trip.[80]

However, travellers want this assistance without necessarily wanting to relinquish control. Booking.com found that 89% of surveyed consumers wanted to use AI in future travel planning, yet only 12% were comfortable allowing it to make decisions independently.[81] This points to a hybrid near-term model in which AI narrows and adapts the options, while trusted people and brands validate decisions carrying greater cost or risk.

The traveller's expectation can be stated simply: know my preferences, adapt to my needs, but leave the important decisions to me. The greater the consequence of a decision, the more visible the traveller's control should become.

As AI takes a larger role in travel planning, visibility becomes a three-stage test: can the system find the offer, can it act on it and can it explain why the traveller should choose it?

First, the offer must be discoverable and accurately represented. Opening hours, prices, locations, access information, availability and booking conditions need to be current, structured and easy for AI to interpret. Missing or inconsistent information may remove an offer from consideration before the traveller ever sees it.

Second, the offer must be digitally bookable and actionable. By 2030, online bookings are forecast to account for about 81% of total booking value in North America, around 70% in Asia Pacific and Western Europe, 55% in Middle East and Africa and 52% in Latin America.[82] These regional shares provide context for digital distribution, but do not measure whether individual businesses are ready for AI.

A family-run guide or rural guesthouse may provide one of the destination's most distinctive experiences yet still be excluded from an AI-built itinerary if the system cannot check availability or complete the booking. Being visible is no longer enough if the traveller cannot act on the recommendation.

Third, the offer must remain differentiated. If destinations and businesses optimise around the same prompts and recommendation logic, their offers risk becoming interchangeable through the AI lens. Accurate data can earn a place on the shortlist and the ability to book online can keep the offer in the itinerary, but a distinctive proposition, credible evidence and human endorsement still give the traveller a reason to choose it.

Being found is the entry requirement. Being bookable keeps the offer in the journey. Being distinctive wins the choice.

AI intermediation will also change how tourism businesses reach travellers and who controls the commercial relationship. If an AI assistant helps define what travellers want, recommends options and directs them to a booking provider, it can become a new gatekeeper between the supplier and the customer. Direct connections to hotel and experience inventory could reduce dependence on traditional intermediaries. At the same time, AI platforms could introduce another layer of distribution costs, limit suppliers' access to customer data and weaken their ability to build loyalty directly.

Accor's AI integration shows one response to this shift. Accor's ALL Concierge supports discovery, booking management and real-time assistance, while its Butler tool helps hotel teams respond to operational needs.[83] The opportunity is not simply to automate more of the journey, but to use shared context to help travellers and staff act more effectively.

Destinations are applying AI at different stages of the journey. Indonesia's MaiA assistant, launched on the national tourism portal in 2025, offers personalised destination recommendations, automatic itinerary creation and an interactive map in multiple languages.[84] In Canada, Destination BC's HelloBC AI Concierge, launched in beta in 2024, brings together information from more than 30 regional tourism organisations, attractions and resorts to support travellers both before and during the trip.[85] In Saudi Arabia, Visit Saudi's Noura AI assistant provides a conversational interface for destination discovery and trip planning.[86]

Together, the examples show that continuous assistance depends on trusted, connected destination information as much as the AI interface itself. TOURISE and Globant describe the next stage as "Agentic Tourism": AI agents operating under human oversight to coordinate decisions and actions across the journey, rather than improving isolated touchpoints.[87] Competition will increasingly shift from being visible when the trip is booked to remaining accurate, relevant and bookable as the itinerary changes. Destinations therefore need to prepare for AI across the journey, while ensuring that travellers retain control over consequential decisions.

"Travellers don't experience touchpoints; they experience a journey. Agentic Tourism brings AI-native services to that whole journey, with people always in charge, so travellers spend less time managing the trip and more time living it."

- Martin Migoya, CEO and Co-Founder of Globant

3.2 Journey Continuity as the New Measure of Mobility

Travellers now define convenience by continuity, not simply speed. They want unnecessary friction removed while preserving the effort that belongs to the experience.

Speed at the checkpoint solves only one part of the journey. A ten-second border process offers limited reassurance if the traveller cannot see whether their bag will arrive, whether a missed connection has been rebooked, or whether a transfer is still waiting. Travellers experience these stages as one journey, even when different organisations deliver them. Biometrics and digital identity can reduce repeated checks, but convenience is ultimately measured through consistent information, visible baggage status, reliable connections and clear responsibility when a handover fails.

Growing biometric adoption shows acceptance of simpler identity checks at individual touchpoints. The next opportunity is to let verified identity carry across more of the journey, reducing repetition without removing traveller choice.

The benefit is less repetitive work and greater continuity, but convenience cannot come at the expense of choice. Among passengers unwilling to share biometric data, 42% said stronger privacy assurances could change their view, so opt-in approaches and clear alternatives remain essential.[89] Continuity should give travellers greater confidence, without requiring them to surrender control over their identity or data.

International Air Transport Association's (IATA) 2026 digital identity trials show what this can look like across providers. On a journey connecting Tokyo, Hong Kong and a European airport, passengers shared their identity in advance and reused it across multiple airports and airlines, including at the transfer stage.[90] The value came from connecting the journey rather than accelerating one checkpoint in isolation.

Euromonitor's 2026 Lifestyles Survey suggests that consumers value saving time and simplicity: 49% agreed that they are willing to spend money to save time and 69% that they are looking for ways to simplify their lives.[92]

Continuity and character are not competing goals. The objective is not to maximise speed everywhere, but to remove difficulty created by disconnected systems while preserving journeys that contribute to the destination experience.

50% of respondents in IATA's 2025 Global Passenger Survey had used biometrics during an airport journey.[88]

88% of the same respondents said real-time baggage tracking would increase their confidence.[91]

Once unnecessary administrative friction is removed, travel within a destination should still reflect its character and pace. A slower journey is not automatically an inconvenient one. In some rural or nature-based destinations, a walk, boat journey, bicycle route or locally operated transfer forms part of the experience. The more useful distinction is between effort that adds meaning and difficulty created by weak systems.

Mobility therefore faces two related but distinct tests. Across the journey, continuity means fewer disconnected handovers, repeated processes and information gaps. Within the destination, fit means mobility that is reliable and accessible while remaining appropriate to the character and capacity of the place.

That second test is not simply how much transport infrastructure can be built. Faster and larger systems may expand reach, but they can also erode the heritage and character that made the destination worth reaching. The right mobility model should match the destination's proposition and the level of demand it can responsibly serve.

This does not excuse inaccessibility or poor infrastructure. Destinations need to provide clear guidance about distance and intensity, reasonable options for travellers with different mobility needs, and reliable emergency access. The test is whether the effort is intentional, clearly communicated and supported by suitable alternatives.

Infrastructure also needs a life beyond peak seasons and cyclical tourist demand. Roads, public transport and digital systems create stronger long-term value when residents can use them throughout the year. Tourist-only infrastructure carries greater seasonal and financial risk.

Taken together, the mobility advantage lies not in making every stage faster, but in making the journey dependable and appropriate to the place. Across providers, that means fewer repeated processes, clearer information and assigned responsibility at handovers. Within the destination, it means routes and infrastructure that serve residents year-round while preserving forms of movement that add meaning or protect the place. Once travellers arrive, the same expectation of continuity extends to the stay itself.



"Travellers experience and wish to experience one journey, yet our industry still, in many ways, operates in silos. The next frontier of seamless travel is connecting every touchpoint into one coherent experience and ecosystem management."

- Thomas Woldbye, CEO of Heathrow Airport

3.3 Adaptive Hospitality for a Fluid Traveller

The fluid traveller is pushing hospitality beyond the fixed room: the stay must adapt as its purpose, pace and travelling party change, without losing human judgement or local character.

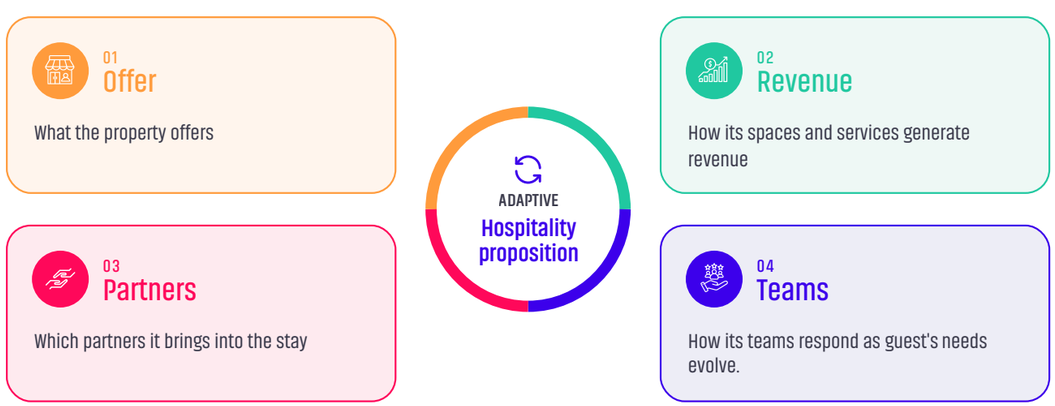
The fluid traveller becomes most visible after arrival. A family trip may include time alone, a business stay may extend into leisure, and a guest may protect one event while adapting everything around it. As Section 1 showed, many travellers add solo days before or after family trips. Euromonitor's 2026 Lifestyles Survey suggests this need extends beyond travel: 25% of respondents ranked time for themselves as their top personal priority, the most common first choice among the 10 priorities listed, and 72% ranked it among their top five. More than a quarter also intend to seek time alone during group travel.[93]

A single booking can therefore contain several travel moments. The guest arriving for work may need leisure recommendations later in the stay. A family travelling together may also need space to separate. A carefully planned itinerary may need to change with the weather, energy levels or a new interest discovered after arrival.

Accommodation providers hold one of the longest continuous relationships with travellers at the destination. This positions them to move from delivering the room booked months earlier to managing a stay that can adapt to the needs of the guests. Workspace, dining, wellbeing, family activities, time alone and local experiences can be combined differently as the purpose and rhythm of the trip evolve.

This shift changes both what properties offer guests and how they operate and generate revenue. Flexible spaces and services allow the property to serve several travel moments through one booking. New commercial models can generate value from workspaces, pools, spas, restaurants and events beyond the overnight room. Partnerships with local businesses and experience providers extend the offer into the destination, while connected inventory and empowered staff allow services to adapt without asking the guest to begin planning again.

The hospitality proposition therefore becomes adaptive across four dimensions: what the property offers, how its spaces and services generate revenue, which partners it brings into the stay, and how its teams respond as guest's needs evolve.



Personalisation, however, combines machine memory with human judgement. AI can handle repeatable requests, retain preferences and identify relevant options. Staff become more valuable where the decision requires firsthand advice, reassurance, taste or local knowledge.

52% of international travellers said they would pay more for advice guaranteed to come from a human expert rather than AI.[94]

The division of roles should reflect the decision. Technology can adjust a booking, remember a dietary preference or surface available activities. A member of staff can interpret whether an experience suits the guest, reassure a family when plans change or recommend a place that an algorithm may overlook. The strongest service model uses technology to recognise the changing travel moment and people to respond with judgement.

Adaptability should not make properties interchangeable. As architectural spectacle becomes easier to reproduce, hotels can distinguish themselves by becoming trusted gateways to the destination's living culture. Local food, craft, events, suppliers and partnerships create a stronger connection to place than design motifs alone because they link the stay to the local economy and everyday life.

Grand Mercure Yichang Waitan puts this principle into practice. Its design began with research at Yichang Museum, translating local history, landscape and materials into a contemporary hotel.[95] Naviva, a Four Seasons Resort in Mexico, demonstrates the adaptive model more directly. Personal guides organise the stay around each guest, including planned and unscripted experiences, while flexible dining operates without fixed menus or schedules.[96] The offer can therefore change as guests decide whether they want to be active, restorative or spontaneous during their stay. Adaptation continues beyond booking rather than being fixed in advance.

The opportunity extends beyond additional revenue. A property that responds as the trip changes can become a more relevant and trusted partner throughout the traveller's stay, creating opportunities to strengthen satisfaction, loyalty and repeat consideration. These outcomes are not automatic: they depend on useful personalisation, empowered staff and partnerships that connect the guest meaningfully to the destination. Euromonitor's 2026 Travel and Loyalty survey points the same way across sectors: making the shopping process more convenient was the most cited driver of loyalty (29% of respondents), ahead of personal recognition based on past visits (18%).[97]

> "The next frontier of hospitality is not simply personalising a room, but creating experiences that adapt to the changing needs, expectations and purpose of every stay."
>
> **- Sebastien Bazin, Group Chairman & CEO of Accor**

3.4 Confidence Built into the Booking

In an era of disruption, confidence is entering the purchase decision as travellers look for flexibility, viable alternatives and accountable support when plans fail.

Geopolitical instability, extreme weather, health events and operational failures are increasingly influencing travel decisions before departure. Rather than simply cancelling, travellers may change the destination, route, timing, booking window or level of protection. They increasingly evaluate a trip through three practical questions:
Can I change it? What happens if one part fails? Who will help repair the rest?

Allianz Partners' 2026 research across 10 markets found that 72% of respondents were concerned about geopolitical instability and 59% about delays and cancellations.[98] Among travellers purchasing insurance, 42% did so at the same time as booking the trip.[99] In Euromonitor's 2026 Travel and Loyalty Survey, 15% of respondents said they would pay more for a trip to a safe destination. Among this group, 40% said they would pay at least 30% extra.[100] These findings provide context on risk perceptions and stated willingness to pay for destination safety, but do not measure whether, or to what extent, flexibility or recovery support influenced booking choice.

The industry opportunity is to make optionality visible before and after departure. Before the trip, it means flexible terms, clear change policies and suitable insurance. During the journey, it means live information, viable alternatives and access to someone authorised to act. Insurance may cover the loss, but travellers still need help completing the trip.

This is where the connected journey faces the ultimate test. A flight, hotel, transfer and activity may appear in one itinerary, even though four providers remain responsible. If the flight is cancelled, the traveller should not have to repair every booking alone. The service that brought the journey together should help reorganise it, or make clear at purchase who will. AI can detect disruption and turn around options quickly, but accountability still needs a named provider, clear terms and access to human intervention.

Lufthansa Express Rail is a case in point across different modes of transport. Rail and air are sold as one connected journey,[101] with a transfer guarantee and automatic rebooking onto the next train or flight if a delay breaks the connection. Beyond convenience, the integrated product sells a route forward when the original plan fails.

The same traveller expectation applies at the destination level. Japan's Safety Tips app, for instance, provides international visitors with emergency warnings and guidance in 15 languages, turning national preparedness into information travellers can use during the journey.[102] TOURISE and Oxford Economics analysed 85 major crises over two decades and found that destinations that prepared before a crisis recovered up to 1.5 times faster than those that waited.[103] Preparedness protects confidence, connectivity and commercial relationships before demand disappears.

Flexibility, reliable recovery support and clearly assigned accountability can differentiate one offer from another before purchase and protect trust when plans fail. Their commercial value does not depend on every traveller paying more: they can reduce hesitation, strengthen preference and give travellers a reason to return to a provider. The strongest promise is simple: when something goes wrong, the traveller knows who is responsible, what options remain and how the journey can continue.

By 2030, the adaptive journey will be shaped less by the number of technologies deployed than by whether providers can act together when the trip changes. No airline, hotel, platform or mobility provider can guarantee the recovery of a multi-provider itinerary alone. This requires shared data, agreed responsibilities and the authority to act across organisational boundaries. The adaptive journey is therefore not a product that one provider can deliver, but an ecosystem capability.





4.0 From Traveller Insight to Ecosystem Action

Travellers experience a destination as a whole. Future-ready destinations must therefore align the organisations behind that experience around shared objectives, coordinated decisions and measurable outcomes.

Traveller demand is becoming harder to predict through fixed profiles, while the journey must respond as needs and circumstances change. Demand is forming around travel moments. Depending on the trip, travellers may seek participation, wellbeing or visible local benefit. As digital assistance becomes more familiar, greater continuity is emerging as the next expectation. AI is also shaping which destinations and experiences enter consideration. **Together, these shifts raise a practical question: how can multiple organisations deliver the connected experience travellers increasingly expect?**

Most destinations continue to operate through separate functions. Marketing teams study demand, product teams develop experiences, technology teams improve platforms, infrastructure teams expand capacity and sustainability teams measure impact. Travellers, however, encounter these functions as a single experience. A difficult booking process, poor transport connection or district detached from local life can weaken their perception of the destination as a whole. A future-ready ecosystem therefore depends not only on new assets, but on connecting existing ones around travellers' journeys and residents' daily lives.

Residents and travellers must also sit at the centre of how destinations plan for growth. Residents sustain a destination's identity and demonstrate whether investment retains value beyond peak periods. Travellers rely on many of the same transport systems, public spaces and services for a shorter period. Development that serves both groups is therefore more resilient than development designed for visitors alone.

The Five Imperatives that follow set out what destinations need to achieve.
Cross-Sector Partnerships to Deliver the Five Imperatives then illustrates who needs to work together and what each partnership can achieve.
The High-Value Trip Scorecard assesses the value trips create and guides five practical destination decisions.
Actions by Stakeholders across the Five Imperatives sets out what each group can do next.

4.1 Five Imperatives for the Future-Ready Tourism Ecosystem

The five imperatives below translate the report's findings into an action agenda. Each sets out what destinations need to achieve; how policymakers, Destination Management Organisations (DMOs) and private-sector players can contribute; and where they must work together.

The imperatives create opportunities through both near-term service improvements and longer-term investment in destination capability. Some actions can begin immediately by improving how journeys are planned, booked and managed, making offers easier to find, adapt and connect. Others require longer-term investment, including infrastructure, workforce capacity, climate resilience and ecosystem coordination. Future-ready destinations should pursue both tracks simultaneously: practical improvements that strengthen the traveller experience today, alongside investments that expand destination value and resilience over time.

1. Plan for fluid travel moments, not fixed traveller profiles

Why it matters:

The same traveller can be value-conscious on one trip and a premium buyer on the next. Demographics continue to indicate broad needs and purchasing power, but the travel moment determines the trip: why the journey is being made, who influences it, which expenditure is protected, how much time is available and who travels.

The practical response is to replace persona-based planning with a map of the travel moments that the destination can credibly serve. For each moment, destinations should identify the point of entry, whether sport, wellness, a family occasion or a cultural interest, together with the typical spending pattern and the trigger for a return visit.

No single organisation has a complete view of the travel moment. Airlines, accommodation providers, platforms, payment providers and destination authorities each hold different signals of demand. Combining these perspectives can provide a more complete understanding of traveller behaviour.

The role of policymakers and DMOs:

Policymakers and DMOs should build demand intelligence around purpose, timing, companions, influence and protected expenditure, alongside nationality, age and income.

The role of private-sector players:

Private-sector players should create product and pricing structures that allow the same traveller to move between value and premium choices within one journey.

Working together:

Putting this into practice requires partners to agree how their evidence will be combined and used, with clear rules for responsible data use. This shared view should guide four practical choices:

- **Which products and experiences to develop.**
- **Which travel moments and source markets to prioritise.**
- **Which seasons and locations to support through pricing and incentives.**
- **Where marketing investment can create the highest destination value.**

2. Build around outcomes the destination can credibly deliver

Why it matters:

Attractions tell travellers what they can do; a destination promise tells them why they should choose the place. Cultural participation, wellbeing and visible local benefit are three opportunities explored in this report, alongside propositions built around sport, entertainment, nature or family experiences. Whatever the promise, the destination must have the capability to deliver it. Wellness requires qualified expertise and clear boundaries with healthcare. Cultural participation requires residents to lead the experience and retain its value. For a lesser-known destination seeking overnight demand, the promise must be compelling enough to turn a day visit into a stay, supported by manageable access and suitable accommodation.

Destinations should therefore prioritise a differentiated promise rooted in what the place can credibly deliver, invest in the capabilities required to substantiate it and develop supporting products around that promise.

AI readiness helps make that destination promise findable, bookable and distinctive. Destinations need clear, reliable information that explains what distinguishes their offer, whom it suits and how it supports the promised outcome. For wellness, this includes programme content, practitioner qualifications and suitability; for cultural experiences, the activities offered and who leads them. Linking this information to current prices, availability and booking options helps travellers move from an AI-assisted recommendation to an experience the destination can credibly deliver.

The role of policymakers and DMOs:

Policymakers and DMOs should align infrastructure, skills development, licensing, standards, incentives and destination marketing around the outcomes the destination has chosen to own.

The role of private-sector players:

Private-sector players should translate that promise into credible, bookable products and services, supported by the expertise and evidence the outcome requires.

Working together:

Delivering the chosen promise requires capabilities that sit across different organisations. Destination authorities, operators, regulators, education providers, investors and community representatives should resolve three practical questions:

- **What expertise, service standards and evidence are needed to substantiate the chosen promise?**
- **Which partners will close the gaps in skills, infrastructure or specialist provision, and how will this be funded?**
- **How will partners ensure that information used in marketing, AI recommendations and booking accurately reflects what the destination can deliver?**

3. Connect the journey, then own the handovers

Why it matters:

Travellers still perform much of the work between touchpoints by repeating information, monitoring connections and identifying who can help when disruption occurs. AI and digital identity are beginning to reduce this friction, but primarily within individual companies rather than across the full journey.

Connecting the full journey requires dependable data, staff who understand how to use it, and clear authority to act when plans break down. Rather than attempting to integrate the entire destination ecosystem at once, destinations and industry partners should begin with the handovers that cause travellers the most difficulty. An airport, airline, rail or transfer operator and hospitality partner could, for example, agree which disruption information is shared, who contacts the traveller and who has the authority to adjust onward transport or accommodation. These targeted agreements allow one change to move through the itinerary without requiring the traveller to repair every booking separately.

The role of policymakers and DMOs:

Policymakers and DMOs should create the conditions for services to work across organisations through interoperable standards, secure data-sharing frameworks, appropriate digital-identity systems and clear consumer protections.

The role of private-sector players:

Private-sector players should connect bookings and service handovers, share relevant real-time information and give a named provider the authority to intervene when one booking affects the rest of the itinerary.

Working together:

For each priority handover, the providers involved should agree:

- What real-time information must be shared when a connection or booking changes?
- Who will contact the traveller and coordinate the response across affected providers?
- Who is authorised to adjust onward transport, accommodation or activities, and when is traveller approval required?

4. Make local value a condition of tourism growth

Why it matters:

Scale remains important for destinations seeking to build awareness, access and capacity. However, the way growth is designed determines whether it strengthens the destination or gradually erodes the qualities that made it attractive.

Hotels and districts can express local identity through climate-responsive design, regional materials, craft and building traditions, but authenticity cannot end with appearance. It must extend into operations and the wider visitor economy. A hotel may look locally rooted while importing most of what guests eat, experience and buy; equally, a historic district may preserve its buildings while losing the residents and businesses that gave it meaning. Tourism growth strengthens a destination only when local identity shapes how the sector operates as well as how it looks.

Local sourcing, employment and resident use should therefore be treated as measurable conditions of new development rather than optional additions. This requires destinations to set clear targets and track how much tourism value remains within the local economy. What gets measured is more likely to influence investment and operational decisions.

To assess whether growth delivers these local benefits, destinations can track the share of tourism jobs held by local residents, procurement expenditure directed to local suppliers and small and medium-sized enterprises (SMEs), the estimated share of visitor spending retained within the destination, resident satisfaction and residents' access to tourism-supported amenities. These are illustrative measures, not a prescribed set of requirements; each destination should establish baselines and set targets and thresholds suited to its economy, capacity and development priorities.

The role of policymakers and DMOs:

Policymakers and DMOs should embed local-value requirements within procurement, planning, licensing, development agreements, workforce policy and investment incentives, then measure performance against them.

The role of private-sector players:

Private-sector players should set and report targets for local sourcing, employment and SME integration, while investing in resident-facing amenities and partnerships with local cultural producers.

Working together:

Planning authorities, investors, operators, local businesses, cultural organisations and resident representatives should agree how local benefit will be built into development agreements from the outset. Heritage-led reuse, converting underused historic buildings into hotels and venues, is one application, but the same principle applies to new development. Partners should resolve three practical questions:

- What local hiring and purchasing commitments will investors and operators make, and which supply opportunities can local businesses fulfil?
- What protections will safeguard heritage, existing local businesses and residents' access to shared spaces and amenities?
- How will residents and local businesses help shape these commitments before development agreements are finalised?

5. Manage the destination as one system

Why it matters:

Tourism performance at a destination depends on decisions made across government, destination authorities, mobility, hospitality, attractions and infrastructure. When each part of the ecosystem works from a different view of demand, capacity, visitor movement, spending, resident pressure and disruption, investment and operational decisions can work against one another.

Collaboration becomes valuable when it leads to coordinated decisions, accountable delivery and measurable outcomes.

A shared view should change how investment priorities are set. The starting question is not "what tourism should build next", but "what is currently preventing the destination from creating more value". The answer may be another hotel or flagship attraction. It may instead be last-mile transport, workforce housing, climate adaptation or systems that enable local businesses to be discovered and booked. Investment should address the constraint that matters most to the destination.

A destination-wide view should also show how different source markets support the tourism economy across seasons, locations and periods of disruption. In 2026, 42% of travellers surveyed across 10 markets planned to holiday within their own country.[104] Euromonitor's 2026 Travel and Loyalty Survey also points to a strong domestic base globally: 77% of respondents had taken at least one domestic personal trip, compared with 48% who had taken an international one.[105] Domestic demand helps businesses stay open and people stay employed when international travel is disrupted. It may not fully replace the spending or reach of inbound markets, so destinations should build it before disruption, with products, pricing and stories that appeal to residents.

The role of policymakers and DMOs:

Policymakers and DMOs should consider establishing a shared view of demand, capacity, visitor movement, expenditure, resident pressure and disruption. They should also define common priorities, assign responsibility for cross-sector decisions and ensure that the evidence leads to action.

The role of private-sector players:

Private-sector players can contribute to destination planning by sharing relevant, aggregated data and identifying emerging capacity or service constraints. They can also coordinate operational responses to peak demand, major events and disruption, while protecting commercially sensitive information and retaining control over their own commercial decisions.

Working together:

Managing the destination as one system requires four foundations:

- **Shared intelligence that establishes a common view of demand and capacity.**
- **Agreed priorities that define the outcomes the destination is pursuing.**
- **Clear governance that assigns decision-making and delivery responsibilities.**
- **Common performance indicators that show whether action is producing the intended result.**

A future-ready destination coordinates intelligence, investment and operations as deliberately as it develops hotels and attractions. This requires public authorities and businesses to use their shared understanding of demand and capacity to agree priorities, assign responsibility and review results together. When transport, staffing or infrastructure limits growth, investment and operational decisions across organisations need to address that same constraint. The result is an ecosystem that can direct resources where they are most needed and respond to change while maintaining a connected experience for travellers and lasting benefits for residents.

Cross-sector partnerships to deliver the five imperatives

The Future Traveller pushes Tourism beyond Tourism.

PARTNERSHIP	WHO COMES TOGETHER	SHARED OUTCOME
Fluid travel moments	DMOs × Airlines × Hospitality × Platforms × Payment and data providers	A fuller view of demand that informs product development, pricing, marketing and capacity planning.
Adaptive journey	Tourism × AI × Digital identity × Borders × Mobility	A connected journey with fewer repeated processes, more responsive assistance and clearer accountability.
Wellness destination	Tourism × Healthcare × Insurance × Hospitality	A credible wellness offer in which expertise, standards, protection and aftercare match the promise.
Living culture	Tourism × Communities × Cultural institutions × Developers	Experiences that sustain living heritage, strengthen local participation and retain more value within the destination.
Resilient destination	Tourism × Climate and data × Infrastructure × Finance and insurance	Contingency and crisis planning, coordinated recovery and greater continuity for travellers, businesses and residents.

Note: These partnerships are illustrative; each can support more than one imperative.

4.2 From High-Value Traveller to High-Value Trip

A fluid traveller makes value situational: the return depends on when, where, why and how each trip takes place.

Destination value depends on the fit between a particular trip and what the place can responsibly support. The same traveller can generate very different returns across seasons, locations and purposes.

The label "high-value traveller" assumes that value travels with the individual. In practice, value is created through the interaction between the traveller, the itinerary and the destination's available capacity. A budget-conscious visitor who travels off-peak, stays longer and spends across local businesses may create more value than a high spender whose short peak-season stay is concentrated in one hotel and a small number of venues. Value must therefore be assessed trip by trip rather than traveller by traveller.

The balance between volume and value will differ by destination because each place begins with a different level of demand, capacity and constraint. Emerging destinations may still need greater awareness, connectivity and visitor scale, while mature cities may need to redirect demand beyond their busiest seasons and districts. Islands and rural destinations may place greater weight on length of stay, local expenditure and ecological limits. Volume reveals the scale of tourism; value reveals what that scale contributes, where the benefits remain and what pressures it creates.

USD 419 Billion

Global consumer spend on package holidays including experiences by 2030, growing at a nominal CAGR of 5.7% from 2025.[106]

Experiences often anchor the high-value trip because they are the part of the journey travellers are most likely to protect when budgets tighten. A compelling cultural event, wellness stay or family occasion can justify the trip itself and generate demand across accommodation, mobility, food, retail and local experiences. The strategic opportunity is therefore not simply to sell more activities, but to develop distinctive experiences that anchor the itinerary and distribute value across the wider destination.

The High-Value Trip Scorecard: Four Dimensions of Destination Value

The High-Value Trip Scorecard helps destinations compare trips on four dimensions before deciding what to develop, price, distribute or fund. Destinations can use it to review trips side by side, treating the four dimensions as a basis for judgement rather than a single score.

01	**Economic return**	Expenditure, length of stay and spending on locally delivered experiences.
02	**Distribution**	When and where value occurs, and whether the destination has available capacity.
03	**Local return**	Employment, procurement, ownership, SME participation and cultural contribution.
04	**Destination cost**	Pressure on infrastructure, residents and natural or cultural assets, and whether that pressure can be sustained.

A high-value trip generates a strong total return from the capacity the destination can responsibly provide. A value flight, mid-market accommodation and one high-investment experience can form part of the same itinerary. What matters is the return generated across the trip, who participates in that value and the pressure placed on assets or services already closest to capacity.

Destination management is moving in this direction. Industry stewardship frameworks increasingly place resident satisfaction, local prosperity, seasonal and geographic distribution and resilience alongside visitor growth. Cities such as Madrid and Dubrovnik similarly manage demand by place and time rather than relying on annual totals alone.

CASE STUDY|MADRID

Spreading demand across the city and the year

THE CHALLENGE

Madrid set out to decentralise visitor flows and reduce seasonality while protecting value for residents and visitors alike.[107]

THE RESPONSE

The 2024–2027 Tourism Strategic Plan, approved in January 2025, made redistribution an explicit objective. A Tourism Intelligence System now combines visitor, spending, accommodation, sustainability and visitor-flow data, showing where and when tourism occurs.[108]

REPORTED PROGRESS

Madrid reported more than 900,000 visitors a month for nine months in 2025. Six years earlier, that level was reached in roughly half as many months. The city also has a plan to spread tourism benefits across 22 tourist areas.[109]

9 months with 900,000+ visitors in 2025

22 tourist areas covered by the plan to spread tourism benefits more widely

CASE STUDY|DUBROVNIK

Managing pressure in the historic core by place and time

THE CHALLENGE

Crowding in the Old Town is concentrated in both time and space, driven by cruise arrivals, day visitors and popular filming locations.[110]

THE RESPONSE

Live headcounts at the Old Town gates are combined with scheduled cruise passengers, arrivals, overnight stays and weather forecasts to anticipate surges. Occupancy is published online as a simple traffic-light signal.[111]

Alongside a 2019 memorandum of understanding with the cruise industry body CLIA, cruise lines have developed tours to sites beyond the Old Town.[112]

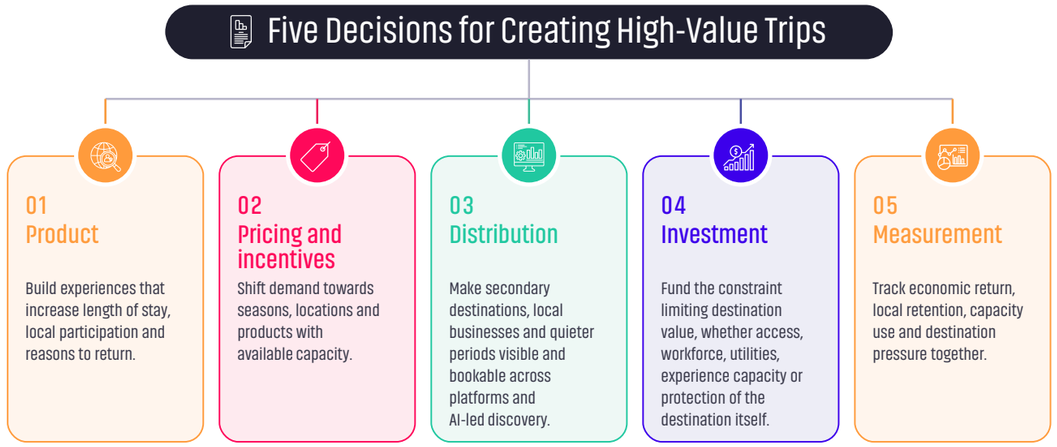
THE RESULT

Cruise lines staggered arrival and departure schedules in 2018 and 2019 to relieve congestion at the Old Town's Pile Gate.[113]

11,275 people is the Old Town's carrying capacity, tracked live against six gate counters

"The future of destination competitiveness will depend not just on how much visitors spend, but on where that spending goes, when it happens, and the lasting value it creates for local communities." **- Eduardo Santander, CEO/Executive Director, European Travel Commission (ETC)**





Finland's Tourism Monitor illustrates how this wider evidence base can work. It considers visitor volume and expenditure alongside carbon footprint, trip duration, visitor segments and satisfaction, allowing demand, value and the condition of the destination to inform the same decisions.[114]

Arrivals measure reach, while receipts measure economic scale. Neither reveals the complete return from the trip. Future-ready destinations must also understand where value is retained, when capacity is consumed, who benefits and what condition the place is left in.

Value is multidimensional: a trip can create economic value for businesses while retaining little locally or adding significant environmental pressure. The High-value Trip Scorecard therefore measures destination value, not visitor expenditure alone – and value becomes something the destination can design, distribute and measure, one trip at a time.

The defining question is therefore: **which trips create the strongest and most durable return from the capacity the destination can responsibly provide?**

The Destination of the Future

A future-ready destination understands what it stands for, which travel moments it can serve distinctively and which promises it can deliver credibly. This clarity allows it to develop experiences that travellers will protect, direct demand towards seasons and locations with available capacity, and make local businesses more visible and bookable. The commercial opportunity lies in designing trips that create stronger returns across accommodation, mobility, food, retail and experiences while remaining appropriate to the destination.

Realising this opportunity requires coordinated action. Destinations need to plan around the travel moment, invest in the capabilities behind a credible outcome, remove friction that adds no value and use shared evidence to direct growth. Technology can improve discovery, booking and adaptability without making the offer interchangeable. Infrastructure can expand access while serving residents throughout the year. Hospitality can connect contemporary service with local experiences, suppliers and culture. Together, these choices can increase length of stay, distribute spending more widely, strengthen local enterprises and protect the cultural, natural and social assets on which future demand depends. This is the commercial foundation of a future-ready tourism ecosystem.

Actions by Stakeholders Across the Five Imperatives

The table below brings together the actions arising from the five imperatives by stakeholder, providing a consolidated reference for each group.

STAKEHOLDER	WHAT TO DO NEXT
Governments and policymakers	**Treat tourism as an interconnected ecosystem requiring coordinated action across government, with businesses and communities as partners in its development.** Align visa, aviation, health, culture and data policy around the travel moments the country can serve, set measurable local-value conditions for new development, and build the standards that let identity, bookings and information move across providers.
Tourism authorities and DMOs	**Replace persona-based planning with a map of travel moments.** Build demand intelligence around purpose, timing, companions and protected spend, prioritise a differentiated promise the destination can credibly deliver, and manage demand by place and season rather than by annual arrivals.
Airlines, airports and mobility providers	**Compete on continuity.** Connect identity, baggage and rebooking across the journey, sell flexibility and clear change terms as part of the product, and make capacity visible early so travellers can adapt a trip rather than cancel it.
Hospitality and experience operators	**Design for the fluid guest.** Let one booking carry several travel moments, use technology for routine requests and people for judgement, anchor the stay in living local culture, and offer clear price ladders so travellers can trade down on some elements while paying a premium for the ones that matter.
Platforms, AI and technology providers	**Make the offer readable by machines and trustworthy to people.** Keep destination data current and structured, give smaller operators a route to bookable visibility, and design AI assistance that narrows and adapts options while leaving the consequential decisions to the traveller.
Investors and developers	**Direct capital towards the constraints that most limit destination value.** The priority may be accommodation or a flagship attraction, or it may be last-mile access, workforce housing, climate adaptation or systems that let local businesses be found and booked. Assess investments not only for their financial returns, but also for their contribution to local economic value, the distribution of demand and pressure on destination capacity.
Communities and cultural institutions	**Lead the experiences built on local culture.** Decide what can be shared and how, keep practitioners at the centre of the product, and use transparent accounting of where visitor spending goes to turn resident support into a lasting competitive advantage.

Source: Euromonitor International analysis

Conclusion

By 2030, the opportunity will not be to serve one future traveller, but to build a tourism ecosystem that can recognise and respond to changing travel moments at scale.

The four sections of this white paper describe how traveller behaviour is changing and what those changes mean for destinations and businesses. Demand is becoming more fluid and situational, shaped less by fixed demographics than by the circumstances surrounding each trip. Travellers increasingly seek participation, wellbeing and visible value from their journeys, while expecting experiences that adapt as needs and conditions change.

Understanding the travel moment will become increasingly important to destination planning, product development and investment decisions. Competitive advantage will depend not only on attracting visitors, but on delivering credible outcomes, coordinating the journey across providers and retaining more value within the destination.

The strategic shift is therefore from counting travellers to designing high-value trips. Destinations and businesses should invest in research and analysis that connects travellers' motivations and intentions with their actual booking and travel behaviour. This should help them understand how changes in price, available time, influence and confidence could alter those choices.

By 2030, leading destinations will use the travel moment to shape demand, build around outcomes they can support, coordinate the journey across providers and measure the return created from the capacity they responsibly provide. Success will be reflected not only in arrivals and expenditure, but in longer and better-distributed stays, stronger local enterprises, more resilient infrastructure, greater confidence during disruption and cultural and natural assets able to sustain future demand.

The defining opportunity for the tourism ecosystem is to make growth more adaptive, more distinctive and more valuable to the place that hosts it.



Methodology: About the Data

This report uses 2030 as its main strategic horizon. It draws on the latest available evidence from 2025 and 2026, and uses longer-range indicators, such as population projections to 2050, only to describe structural demographic change. Survey evidence is labelled by geography and describes stated intentions or reported behaviour unless otherwise indicated.

Euromonitor Survey Evidence:
The report draws on two 2026 surveys from Euromonitor International's Voice of the Consumer series:

- The Travel and Loyalty Survey covers 40,105 respondents on travel behaviour and attitudes (Gen Z n=12,259; millennials n=11,756; Gen X n=9,584; baby boomers n=6,145; Gen Alpha n=360), with loyalty questions asked of a subset of respondents (n=20,085) and generative AI questions asked of respondents who use generative AI (n=26,027). The Travel and Loyalty Survey was fielded in March 2026 across 40 markets globally and was representative of online consumers aged 15–65+ years.

- The Lifestyles Survey covers around 40,000 respondents (n=40,225 for attitudes and life priorities; n=39,949 for spending intentions) and is reported for the total sample only. The Lifestyles Survey was fielded in January-February 2026 across 40 markets globally. The Lifestyles Survey was representative of online consumers aged 15–65+ years.

Reading the Survey Evidence:
Survey findings describe stated attitudes, intentions or reported behaviour at a single point in time and do not track the same individuals across trips. Differences between generations are directional, as no significance testing has been applied. Gen Alpha results are based on small samples and are directional only. Results for the features respondents would pay more for are conditional on the respondent having selected the feature, are often based on small subsamples and should not be read as population shares. Average companion types and travel months by generation are Euromonitor calculations from the survey shares.

Definitions

- Destination Capability: The combination of infrastructure, services, skills, governance and experiences that enables a destination to reliably deliver the outcomes travellers seek.
- Destination Management Organizations (DMO): Organisations responsible for coordinating how a destination is planned, marketed and managed, bringing together public authorities, businesses and communities. They can operate at national, regional or city level.
- Destination Value: The economic, social and environmental benefits generated by tourism for businesses, residents and the destination over time, rather than visitor volume alone.
- High-Value Trip: A trip that creates strong value for travellers, businesses and the host destination, assessed through economic return, distribution, local benefit and the pressure placed on destination capacity and resources.
- Protected Spend: Categories of expenditure that travellers prioritise and seek to preserve even when budgets come under pressure.
- Travelling Class: Households with sufficient discretionary income for international leisure travel.
- Time Wealth: Control over when, and for how long, a person can travel.
- Travel Moment: The combination of purpose, budget, companions, schedule flexibility and source of inspiration that shapes a specific trip.

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About TOURISE

TOURISE is the world's premier platform for redefining and shaping the future of tourism.

Powered by the Saudi Ministry of Tourism, the inaugural TOURISE Summit took place 11-13, November 2025 in Riyadh. TOURISE convened visionaries from government, business, investment, tourism and technology communities to deliver high impact initiatives and transformative deals that will reset the industry and build a tourism sector that is sustainable, equitable, and future-focused.

A year-round platform, TOURISE brings together leaders who share a vision to shape the traveler economy. This is where the next 50 years of tourism are shaped.

For more information about TOURISE, visit www.TOURISE.com

For further details contact: media@TOURISE.com

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