

WTM Global Travel Report 2026 Highlights

In association with:

TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY

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INTRODUCTION

Welcome to the WTM Global Travel Report 2026

INTRODUCING THE WTM GLOBAL TRAVEL REPORT



As the world's most influential travel and tourism event, World Travel Market London brings together the global travel community, offering inspiration, networking and sourcing opportunities to help professionals create exceptional travel experiences. As the pace of change across the industry continues to accelerate, WTM is committed to equipping professionals with the insights and intelligence they need to navigate emerging challenges, identify opportunities and plan for the year ahead.

The annual WTM Global Travel Report delivers authoritative data and analysis on the trends shaping global travel, covering more than 185 countries and key tourism flows worldwide to provide a comprehensive overview of the industry and its future direction.

Chris Carter-Chapman
Event Director
World Travel Market London

INTRODUCING TOURISM ECONOMICS



Travellers are more active in 2026 than ever before. Leisure travel remains a key priority in consumer budgets, even as travellers are adapting how and where they visit in response to ongoing disruption and cost-of-living pressures. The industry is on course for another record year.

Tourism Economics, an Oxford Economics company, transforms global economic intelligence into actionable insights for the travel industry. We are delighted to continue our partnership with World Travel Market to share this report, which examines the forces shaping global travel today and over the coming years. Rising incomes and a rebound in long-haul travel point to a future in which more people than ever can explore the world, and destinations that embrace changing traveller preferences are set to gain share and achieve sustainable growth.

Dave Goodger
Managing Director EMEA
Tourism Economics

KEY TAKEAWAYS

Five things to know about travel in 2026

Global travel is set to reach new records in 2026, even as growth slows due to conflict in the Middle East, which has led to increased uncertainty and higher travel costs. Consumers continue to prioritise travel, but are changing how, where and when they go away. Five findings summarise the forces shaping demand into 2027 and beyond:

1 DEMAND IS RESILIENT

Despite disruption from conflict and squeezed household budgets, global travel is on track for new records in 2026. Growth is set to accelerate into 2027 and remain strong to 2032. The industry now recovers from crises in roughly half the time it took two decades ago.

1.57bn
international arrivals in 2026, a new record

2 GROWTH IN 2026 IS CLOSER TO HOME

Long-haul trips, most exposed to higher fares and safety concerns, dip in 2026 as travellers switch to closer destinations, lifting Europe in particular. Long-haul is set to rebound in 2027.

2026 (vs 2025)
+3% within region visits
-3% inter-regional visits

3 TRAVELLERS WANT TO DISCOVER, CONNECT, VENTURE AND RECHARGE

Discovery, local connection, natural offerings and opportunities to disconnect from daily life top wish lists in 2026. These motivations are compatible, so destinations can package them for broader appeal.

37%
travelled abroad to relax, up from 31% in 2025

4 VALUE AND LUXURY BOTH GROWING SEGMENTS

Value-seeking is increasingly important for many, yet a third of travellers have recently undertaken a luxury trip. Tiered products, with clear value at entry level and premium upgrades, can serve both ends of the market.

56%
interested in both budget and premium travel experiences

5 AI IS RESHAPING TRAVEL PLANNING, BUT TRUST RESTRICTS AI BOOKING

Four in five travellers use digital tools to plan, and AI use rises each year. Although most trust AI to search and recommend destinations and itineraries, fewer trust agentic tools to book and pay.

36%
trust AI to complete a travel booking for them

Source: Tourism Economics, 2026



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2026 AT A GLANCE

Global travel reaches new records in 2026, despite disruption

Global travel is set to break records in 2026 across visitor arrivals, nights and spending. Growth is slower than in recent years as the Middle East conflict, oil prices and living costs weigh on demand, but consumers continue to prioritise travel, with domestic trips remaining the backbone of the industry.

1.57bn
international overnight arrivals
+2% vs 2025

23.9bn
total visitor nights (domestic & international)
+<1% vs 2025

US$7.8tn
in-destination spending (domestic & international, nominal)
+9% vs 2025

3 in 4

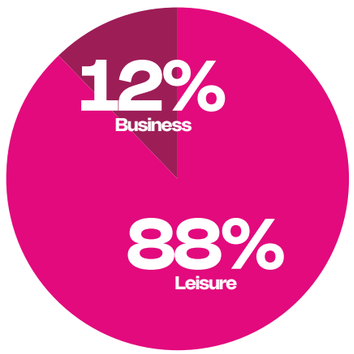


consumers say taking leisure trips each year is an important priority, despite rising cost-of-living pressures

Share of global visitor nights



International visits by purpose



Source: Tourism Economics, 2026

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2026 IN GROWTH

Short-haul holds firm as long-haul stalls

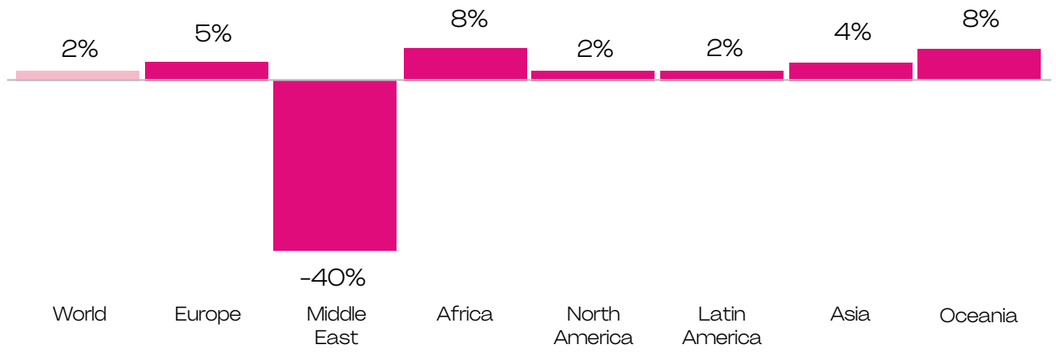
International arrivals are set to rise 2% in 2026. This is slower than in recent years but still results in a record of nearly 1.6 billion arrivals, while visitor spending is expected to grow 9% to US$7.8 trillion. The Middle East has been hit hardest, while Europe, Asia and Africa grow robustly. Disruption and uncertainty are leading travellers to swap long-haul trips for destinations closer to home.

+3%
within region (short/medium-haul) trips, 2026 vs 2025

-3%
inter-regional (long-haul) trips, 2026 vs 2025

-40%
Middle East arrivals; GCC also down **42%** 2026 vs 2025

International overnight arrivals growth by region
2026 vs 2025



Three channels of disruption

Affordability
Higher oil prices lift inflation and fares, squeezing budgets.

Air travel
Less capacity via Gulf hubs (accounting for 15% of global transit in 2025).

Sentiment
Cost and safety worries make travellers cautious.

Source: Tourism Economics, 2026

2027 OUTLOOK

Strong rebound in 2027 as disruption eases

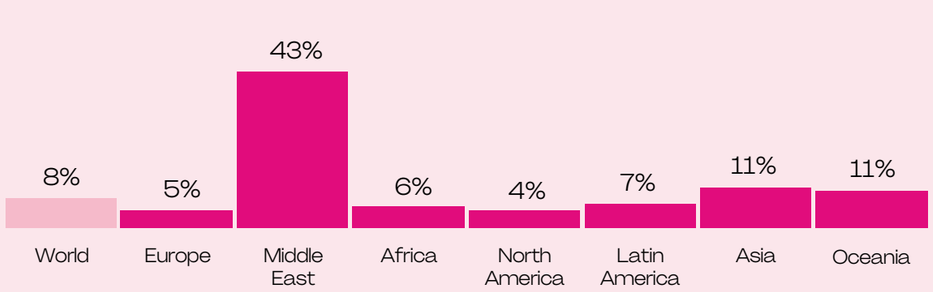
Growth is expected to accelerate in 2027, with international arrivals up 8% as disruption eases. Long-haul travel, the segment hit hardest in 2026, will recover by 11%, as the Middle East is set to rebound (+43%), albeit to levels below 2025 peaks. Recoveries from crises are becoming quicker, as the industry repeatedly proves its resilience. However, there remains significant uncertainty in the short-run due to ongoing geopolitical tensions and resumption of conflict could delay the anticipated recovery.

+8%
global international arrivals growth, 2027 vs 2026

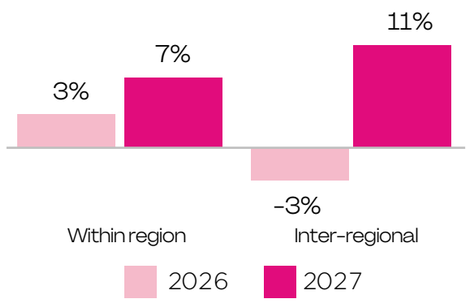
+11%
inter-regional trips in 2027, after **-3%** in 2026

+43%
Middle East arrivals rebound in 2027

International overnight arrivals growth by region
2027 vs 2026



International trips growth



Faster recoveries

10–12 months

average recovery from major crises, down from **~24 months** in the early 2000s

Source: Tourism Economics, 2026

THE ROAD TO 2032

Long-term demand intact to 2032

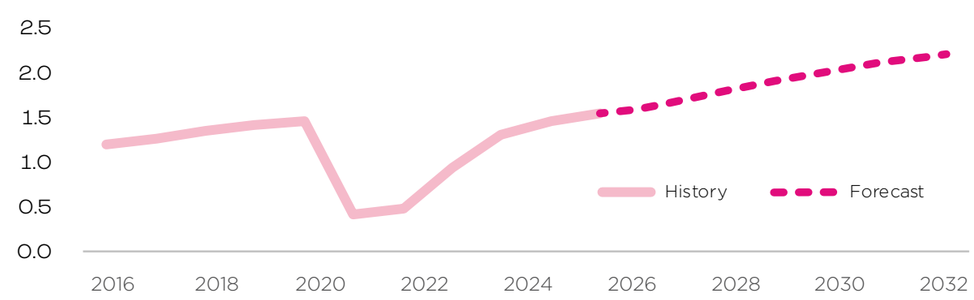
Through to 2032, rising incomes, travel prioritisation and expanding air and accommodation capacity will keep tourism growing faster than the wider economy. International arrivals will rise by around 6% a year to reach 2.2bn in 2032, while total in-destination spending (including domestic) will climb to US$11.3tn. Regionally, the Middle East is set to grow fastest as it recovers from its 2026 setback, while Europe is expected to add the most visitors in absolute numbers.

2.2bn
international overnight arrivals by 2032

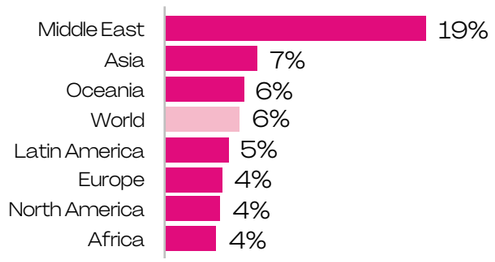
30.6bn
visitor nights worldwide by 2032 (domestic & international)

US$11.3tn
in-destination spending by 2032 (domestic & international)

Global international overnight arrivals
2015–32 (bn)



Avg. annual arrivals growth
2026–32



+599m
more international arrivals in 2032 than in 2026; Europe adds the most **(+226m)**

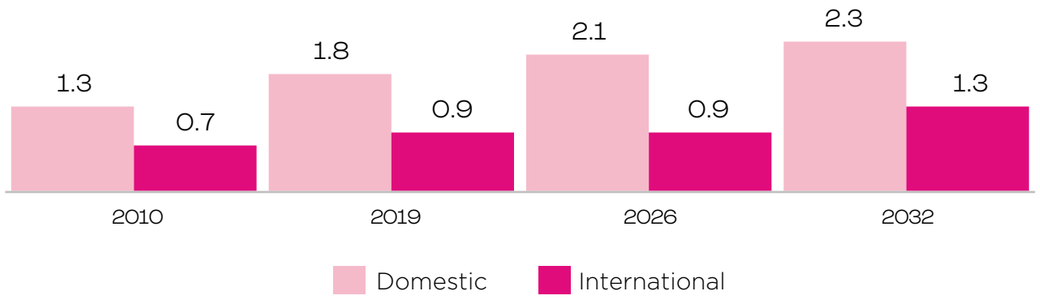
By 2032:
+46% Business arrivals
+37% Leisure arrivals

Source: Tourism Economics, 2026

The travelling class keeps growing, and travelling abroad more

More people are travelling, and more often. The average person spends 2.1 nights a year on domestic trips and 0.9 abroad. International travel is growing much faster: outbound nights per person are set to increase 41% between 2026 and 2032, compared with 13% for domestic nights, as rising incomes put trips abroad within reach of more households. International nights per person are already significantly higher in most developed economies. While couples and families dominate travel parties overall, younger travellers are more likely to travel with friends - and to travel more often.

Global propensity to travel: nights per person per year



+24 million
additional households in India and China able to afford international travel by 2032 (vs 2026)

25
international trips per 100 people worldwide in 2032, up from **19** in 2026

Who they travel with

49%
usually travel in a family group (incl. extended family)

31%
with a partner only

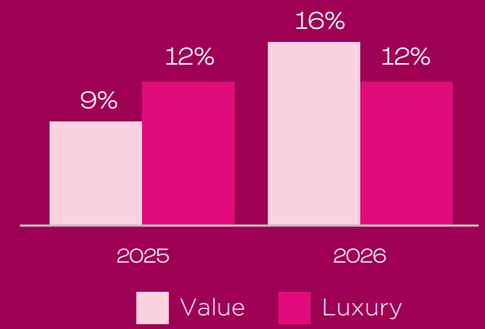
28%
travel with friends (vs. **42%** of 18-34s)

Source: Tourism Economics, 2026

Value vs Luxury: Trading up and trading down

Travellers' spending is polarising, with many economising on some elements of a trip while splurging on others. Value is an increasingly important driver of destination choice, while luxury is reaching a larger and younger audience. These are not separate audiences: many travellers trade up and trade down at the same time. When it comes to accommodation, hotels remain the default, with luxury and midrange sharing the market almost evenly.

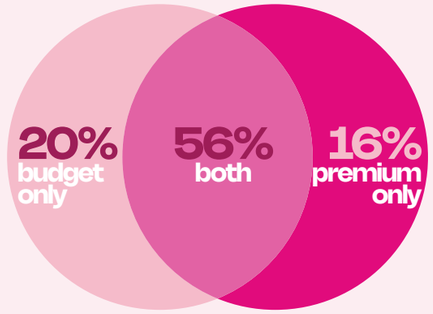
Chose last international destination for value/luxury





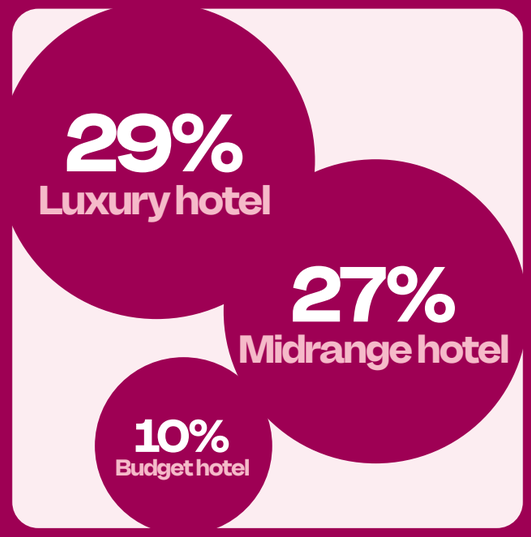
have spent on luxurious experiences when travelling, up from 41% in 2025

Interested in budget, premium or both



50%
of those who spend on luxury also limit their travel spending overall

Main accommodation, last international trip



Source: Tourism Economics, 2026

WHAT DO TRAVELLERS WANT?

Discover, connect, venture, recharge

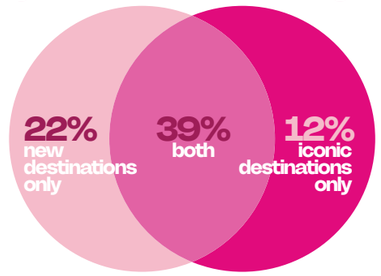
In 2026, traveller priorities are defined by a blend of motivations. Travellers seek personalised, experiential itineraries built around individual passions, spanning four themes: **discover, connect, venture and recharge.** Crucially, these motivations are complementary and can be packaged together within the same trip – pairing a visit to an iconic landmark with exploring an unfamiliar neighbourhood, or a hike with a spa retreat by the sea.

Discover: explore new places, alongside iconic ones

39%
are very interested in visiting both new and iconic destinations

Most discovery-minded: 77% of those considering Sub-Saharan Africa and 74% considering South America are very interested in new destinations

Very interested in visiting...

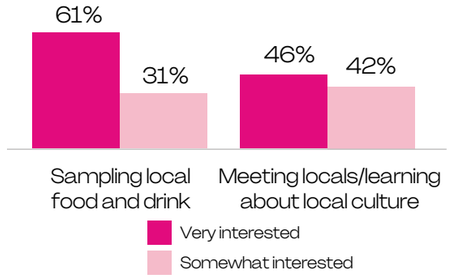


Connect: experience local food, culture, people & shared moments

58%
of international travellers took a trip abroad to attend an event in the past two years (rising to 80% of 18-34s)

Music events are the most travelled-for type of leisure event (37% of all international travellers), followed by sport (24%) and cultural events (22%)

Interested in...



Source: Tourism Economics, 2026

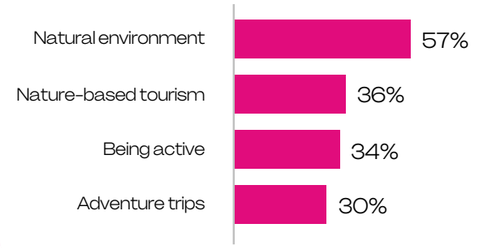
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Venture: be active & adventurous in nature

57%
are very interested in visiting the natural environment

Parents of under-16s are twice as likely as parents of older children to be very interested in nature-based tourism (50% vs 27%) and adventure (42% vs 20%)

Very interested in...



Recharge: relax & slow down

37%
chose their last international destination to relax and unwind, up from 31% in 2025

Luxury is being redefined: among those for whom luxury matters, relaxation (50%) ranks second only to comfort (59%)

Top reasons for choosing last international destination



Source: Tourism Economics, 2026

HOW ARE TRAVELLERS BOOKING?

AI is now a trusted trip planning tool, but not yet a trusted booking agent

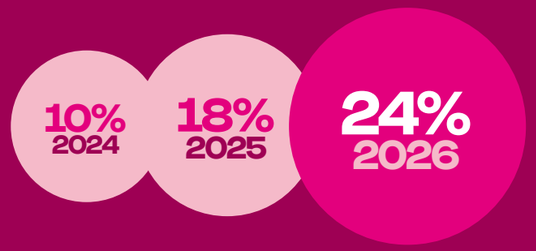
Digital tools now shape most international trips, with consumers increasingly expecting technology to streamline and centralise their trip. When it comes to travel planning, online travel agents are the leading discovery channel and consumer AI usage is rising every year. Younger and Asia-Pacific travellers lead adoption. Most travellers trust AI to search and recommend, but far fewer are ready to let it complete a booking independently.

79%
used at least one digital tool to plan or book their last international trip

Sources used for last international trip



AI use in trip planning



Trust in AI to...

58% compare prices

53% make recommendations

36% complete bookings

54% of 18-34s trust AI to book vs **18%** of those aged 55+

Almost 5x
Those under 35 are almost five times as likely to use AI for travel inspiration than those 55 or over

63%
say new border technology makes journeys faster

59%
want more travel services available on their mobile

Source: Tourism Economics, 2026

HOW ARE BUSINESSES RESPONDING?

The industry is moving to meet digital demand

Tourism professionals increasingly see AI shaping how consumers choose and book travel, and businesses are moving quickly. Platforms and hotel groups are building agentic booking into AI interfaces while airports are scaling biometric journeys. At the same time, destinations are using film, TV and creators to convert inspiration into visits. In 2027, the winners will earn the trust needed for travellers to let AI manage booking.

51%
of tourism professionals rate AI chatbots as very important in shaping travel decisions, up from 37% a year earlier

37%
of tourism professionals expect wider use of AI tools to increase travel spending

Agentic booking in practice

Google launched hotel booking in AI Mode in August 2026, with partners including Booking.com, Expedia, Hilton, Marriott and IHG. Travellers search, compare and pay without leaving the chat, while the hotel or OTA remains the seller. Flights are set to follow.

50%
of air passengers have used biometrics on their last international trip

85%
of those who used biometrics were satisfied with their experience

Source: Tourism Economics, 2026

REGIONAL NARRATIVES

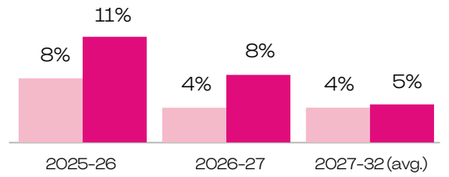
Seven regions, seven stories: Leisure spending (Domestic & International)

Europe

International visitors account for around a third of Europe's leisure spending, the highest share of the three largest regions. International spending is rising 11% in 2026, and domestic 8%. Growth will slow to 5% and 4% a year respectively to 2032.

US$2.05tn
leisure spending in 2026

Leisure spending growth

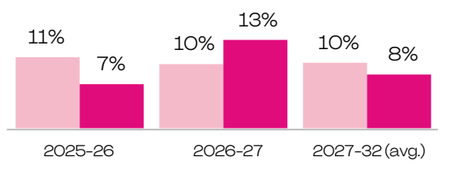


Asia

Domestic travel dominates for Asia, at three-quarters of total leisure spending, and will grow 10% a year to 2032, the fastest of any region. International leisure spending is rising 7% in 2026 and will accelerate to 13% in 2027.

US$1.82tn
leisure spending in 2026

Leisure spending growth

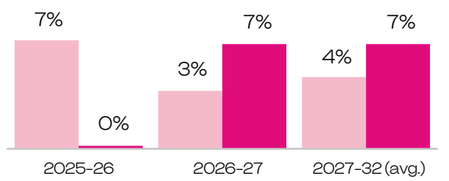


North America

Domestic travellers account for nine-tenths of the region's leisure spending, which is growing 6% in 2026. International leisure spending, broadly flat in 2026, is set to grow by 7% in 2027 and to outpace domestic growth through to 2032.

US$1.57tn
leisure spending in 2026

Leisure spending growth



* Spending reported in nominal US$

Source: Tourism Economics, 2026

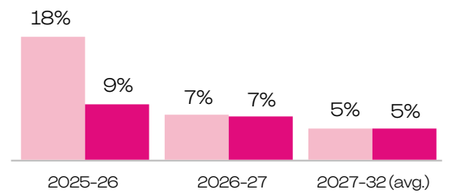
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Latin America

Leisure spending is rising sharply in 2026: domestic spending is up 18%, and international spending 9%. Growth will then settle at around 5% a year for both domestic and international spending through to 2032.

US$0.33tn
leisure spending in 2026

Leisure spending growth

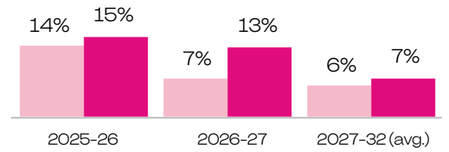


Oceania

International leisure spending is growing strongly in Oceania, rising 15% in 2026 and 13% in 2027, then 7% a year to 2032. Domestic travellers still account for over three-quarters of spending, set to experience growth of around 6% a year to 2032.

US$0.17tn
leisure spending in 2026

Leisure spending growth

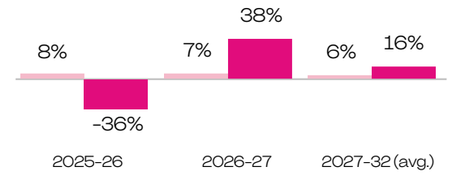


Middle East

International visitors account for over 40% of leisure spending in the Middle East, amplifying the impact of 2026 disruptions: international spending is forecast to decline by 36%, while domestic spending will increase by 8%. A 38% rebound in 2027 will be followed by growth of 16% a year to 2032, the fastest of any region.

US$0.16tn
leisure spending in 2026

Leisure spending growth

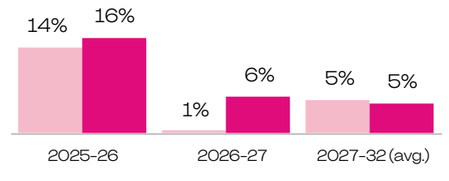


Africa

Leisure spending is more evenly split between domestic and international for Africa than most regions, with international visitors accounting for over 40%. Domestic and international spending are rising 14% and 16% in 2026, and will then grow by around 5% a year to 2032.

US$0.15tn
leisure spending in 2026

Leisure spending growth



Source: Tourism Economics, 2026

REGIONAL SNAPSHOT

Seven regions, seven stories: Leisure nights (International)

Growth is diverging across regions as leisure travellers favour destinations closer to home. Europe remains the largest destination region by number of international leisure nights, while most of the growth comes from Asia Pacific. The Middle East faces a sharp setback in 2026 (-33%) before rebounding strongly in 2027 (+48%). Across all regions, the outlook depends on air connectivity, the strength of key source markets and resilience to shocks.

Europe

Largest region experiencing slower growth as intra-regional demand matures.

+4%	+5%	+4%
2025-26	2026-27	2027-32 (avg.)

Middle East

A story of decline and rebound, with a 2026 setback giving way to a robust and resilient long-term trajectory.

-33%	+48%	+14%
2025-26	2026-27	2027-32 (avg.)

Asia

The main driver of global outbound travel growth over the coming half-decade, due largely to Chinese outbound normalisation and India's travelling class.

+4%	+10%	+6%
2025-26	2026-27	2027-32 (avg.)

North America

Inbound leisure demand remains subdued after a weak 2025, with the FIFA World Cup 2026 and LA 2028 Olympics providing a strong platform for future growth once sentiment improves.

-1%	+5%	+5%
2025-26	2026-27	2027-32 (avg.)

Latin America

Central America leads the way with growing connectivity while offering increasing value to visitors.

+5%	+7%	+5%
2025-26	2026-27	2027-32 (avg.)

Africa

Emerging as a high-growth market from a low base, with future expansion contingent on improved connectivity and increased visa flexibility.

+8%	+6%	+4%
2025-26	2026-27	2027-32 (avg.)

Oceania

Continued reliance on long-haul travel presents both a vulnerability and a growth opportunity for the region.

+4%	+11%	+5%
2025-26	2026-27	2027-32 (avg.)

Source: Tourism Economics, 2026

Source: Tourism Economics, 2026

About Tourism Economics

Tourism Economics, an Oxford Economics company, combines deep travel industry knowledge with rigorous economic tools to help clients make smarter marketing, investment, and policy decisions. The team delivers best-in class forecasting, economic impact analysis, and consulting services for destinations, industry organisations, and corporations worldwide.

Oxford Economics is the world's foremost independent economic advisory firm. Covering more than 200 countries, 100 industrial sectors, and 8,000 cities and regions, we provide rigorous economic analysis and forecasting to empower leaders to make faster, more confident decisions in an uncertain world. With 450+ economists, strategists, and analysts across 20+ global offices, Oxford Economics serves more than 2,800 clients worldwide.

October 2026

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