TRAVEL AND TOURISM

Unpacking the $15 Trillion Opportunity in Leisure Travel

By Christina Mollenkamp, Dennis Utomakh, Mario Farida, Yassin El Khoussy, Lara Koslow, Lauren Taylor, Frederike Schneemann, and Aparna Bhandary

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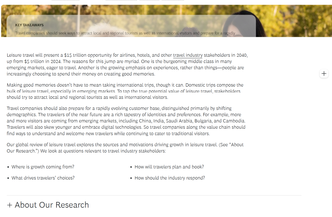
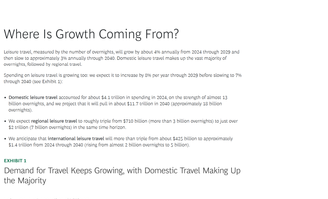




Leisure travel will present a $15 trillion opportunity for airlines, hotels, and other travel industry stakeholders in 2040, up from $5 trillion in 2024. The reasons for this jump are myriad. One is the burgeoning middle class in many emerging markets, eager to travel. Another is the growing emphasis on experiences, rather than things—people are increasingly choosing to spend their money on memories.

Making good memories doesn't have to mean taking international trips, though it can. Domestic trips compose the bulk of leisure travel, *especially in emerging markets*. To see the true potential value of leisure travel, stakeholders should try to attract local and regional tourists as well as international visitors.

Travel companies should also prepare for a rapidly evolving customer base, distinguished primarily by shifting demographics. The travelers of the near future are a rich tapestry of identities and preferences. For example, more and more visitors are coming from emerging markets, including China, India, Saudi Arabia, Bulgaria, and Cambodia. Travelers will also skew younger and embrace digital technologies. Or travel companies along the value chain should find ways to understand and welcome more travelers while continuing to cater to traditional visitors.

Our global review of leisure travel explores the sources and motivations driving growth in leisure travel. (See "About Our Research.") We look at opportunities relevant to travel industry stakeholders:

- Where is growth coming from?
- What drives travelers' choices?
- How will travelers plan and book?
- How should the industry respond?

+ About Our Research

Where Is Growth Coming From?

Leisure travel, measured by the number of overnights, will grow by about 4% annually from 2024 through 2029 and then slow to approximately 3% annually through 2040. Domestic leisure travel makes up the vast majority of overnights, followed by regional travel.

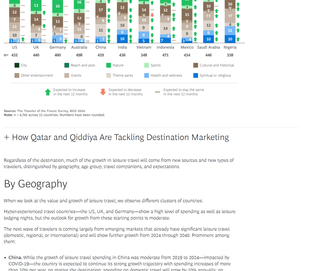
Spending on leisure travel is growing too: we expect it to increase by 6% per year through 2029 before slowing to 7% through 2040 (see Exhibit 1).

- **Domestic leisure travel** accounted for about $4.1 trillion in spending in 2024, on the strength of almost 13 billion overnights, and we expect that it will be in about $12.7 trillion in 2040 (approximately 18 billion overnights).
- We expect **regional leisure travel** to roughly triple from $710 billion (more than 1 billion overnights) to just over $2.1 trillion (7 billion overnights) in the same time horizon.
- We anticipate that **international leisure travel** will more than triple from about $415 billion to approximately $1.4 trillion from 2024 through 2040 (rising from almost 2 billion overnights to 5 billion).

EXHIBIT 1

Demand for Travel Keeps Growing, with Domestic Travel Making Up the Majority

Leisure travel spending ($billions)



Sources: Tourism Economics; BCG analysis.
Note: Regional travel refers to outbound, but not long-haul, travel. Example: Travel from the US to Canada would be regional travel, and travel from the US to China would be international travel. Based on a sample of 66 countries. Numbers have been rounded.

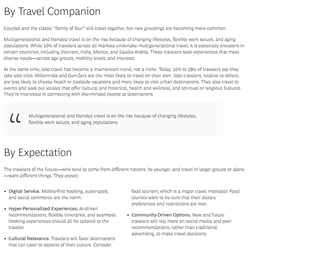
Note that the evolving geopolitical landscape, US tariffs, and shifting immigration policy may affect travel demand. Some sources have adjusted travel forecasts downward, particularly to and from the US; we have not modified the outlooks shared in this report. Changing demand will have both negative and positive implications for travel companies and destinations. But the fact that leisure travel is relatively discretionary may help to temper the long-term impact of policy developments on travel to the US and on leisure travel overall, remains to be seen.

Nevertheless, leisure travel continues, and whether travelers are more or less price sensitive, they seek a variety of destination types. (See Exhibit 2.) Beaches, nature trips, and cities—the classics—are still alluring. They remain the top destinations for leisure travel. Solo travelers prefer cities even slightly more than others. High spenders favor these three destination types, too. But now, travelers are also seeking destinations that offer more curated, purpose-driven experiences. (For an example, see "How Qatar and Qiddiya Are Tackling Destination Marketing.") Wellness and spiritual travel is becoming more popular, with rising demand for mindfulness retreats, holistic health resorts, and religious trips.

EXHIBIT 2

Where To? Travelers Prioritize City Life, Nature, and Beaches

Primary leisure trip destinations booked in the past 12 months (% share)



Sources: The Traveler of the Future Survey, BCG, 2024.
Note: n = 4,000, across 12 countries. Numbers have been rounded.

+ How Qatar and Qiddiya Are Tackling Destination Marketing

Regardless of the destination, much of the growth in leisure travel will come from new sources and new types of travelers, distinguished by geography, age group, travel companions, and expectations.

By Geography

When we look at the value and growth of leisure travel, we observe different clusters of countries.

Hyper-experienced travel countries—the US, UK, and Germany—show a high level of spending as well as leisure lodging nights, but the evidence for growth from these starting points is moderate.

The next wave of travelers is coming largely from emerging markets that already have significant leisure travel (domestic, regional, or international) and will show further growth from 2024 through 2040. Prominent among them:

- **China.** While the growth of leisure travel spending in China was moderate from 2019 to 2024—impacted by COVID-19—the country is expected to continue its strong growth trajectory with spending increases of more than 10% per year, no matter the destination: spending on domestic travel will grow by 10% annually; on regional travel, 12%; on international travel, 12%. China is on track to become the country with the highest travel leisure spending. On a similar note, domestic, regional, and international travel spending will increase by 7%, 9%, and 9%, respectively, per year.
- **India.** India experienced notable strong growth in leisure travel spending from 2019 through 2024, suggesting a quick recovery from COVID-19-related impacts on travel. We expect significant continued growth. Indian travelers are increasingly exploring their own country, as well as the world (domestic, regional, and international overnights will rise by 9%, 6%, and 8%, respectively, per year). Spending will increase by 12% per year domestically, 8% per year regionally, and 10% per year internationally. Our survey found that younger generations are especially keen to travel more and spend more on travel.
- **Saudi Arabia.** Saudi Arabia has been experiencing—and will likely continue to experience—strong growth in leisure travel spending, especially when it comes to domestic travel, where spending rose by 10% from 2019 to 2024. Spending on regional travel grew by 9%, while spending on international travel declined slightly. Looking ahead to 2040, spending on domestic, regional, and international travel will increase annually by 7%, 3%, and 2%, respectively. Domestic overnights will rise by 3% annually through 2040; regional overnights, by 3%; international overnights, 4%. Contributing factors: the importance of religious travel and the appeal of new destinations within Saudi Arabia.

People from Bangladesh, Bulgaria, Egypt, Morocco, and Vietnam, among other countries, are also part of this group of travelers.

A second wave of travel newcomers is ready to pack their bags and go, though they are starting from relatively low numbers, we expect significant growth. These travelers will come from Bolivia, Malaysia, and Turkey, as well as other countries.

By Age Group

Millennials and GenZers are the most influential travelers globally. Relative to older generations, they are planning more trips. (The share of younger generations planning to increase the number of trips is 4 to 28 percentage points higher than that of older generations.) These cohorts are mobile-savvy, socially conscious, and highly engaged online.

In emerging markets, GenAlpha remain an important segment, particularly in India and China.

By Travel Companion

Couples and the classic "family of four" still travel together, but new groupings are becoming more common.

Multigenerational and blended travel is on the rise because of changing lifestyles, flexible work setups, and aging populations. While 18% of travelers across all markets undertake multigenerational travel, it is especially prevalent in certain countries, including Vietnam, India, Mexico, and Saudia Arabia. These travelers seek experiences that meet diverse needs—across ages, interests, mobility levels, and interests.

At the same time, solo travel has become a mainstream trend, not a niche. Today, 16% to 39% of travelers say they take solo trips. Millennials and GenZers are the most likely to venture on their own. Solo travelers, relative to others, are less likely to choose beach or poolside vacations and more likely to visit urban destinations. They also travel to events and seek out locales that offer cultural and historical, health and wellness, and spiritual or religious features. They're interested in connecting with like-minded people as destinations.

> Multigenerational and blended travel is on the rise because of changing lifestyles, flexible work setups, and aging populations.

By Expectation

The travelers of the future—who tend to come from different cultures, be younger, and travel in larger groups or alone—expect different things. They expect:

- **Digital Service.** Mobile-first booking, super-apps, and social commerce are the norm.
- **Hyper-Personalized Experiences.** AI-driven recommendations, flexible itineraries, and seamless booking experiences should all be tailored to the traveler.
- **Cultural Relevance.** Travelers will favor destinations that can cater to aspects of their culture. Consider food tourism, which is a major travel motivator. Food tourists want to be sure that their dietary preferences and restrictions are met.
- **Community-Driven Options.** Now and future travelers will rely more on social media and peer recommendations, rather than traditional advertising, to make travel decisions.

What Drives Travelers' Choices?

Wanderlust is always a motivator. It's baked into our DNA: people everywhere have a deep desire to explore beyond their horizons and experience other geographies and cultures.

But people vary their leisure time to travel for reasons that go far beyond simply taking a vacation. Travelers today seek meaning, convenience, and experiences that align with their lifestyles. But don't scrap the beach chairs, cabanas, snorkeling, golf courses, and the like. The primary motivations for leisure travel continue to be relaxation, escape, exploration, social activity, and visiting friends and relatives.

In addition, a quest for health and wellness, an appetite for great food, and even a desire to combine work time with leisure time are becoming important motivators.

> People use their leisure time to travel for reasons that go far beyond simply taking a vacation.

Motivations for Travel

Across all markets, relaxing and spending quality time with loved ones remain top reasons to travel.

What's changed? How people relax.

Traditional beach getaways, urban adventures, and nature experiences are still popular. Other travel themes—including sports, cultural and historical interests, health and wellness, and spiritual or religious goals—are on the rise.

And food tourism is booming, especially in Asia. Travelers from China, Vietnam, and Indonesia, in particular, rank food as a top motivator. Travelers plan entire trips around food experiences, from Michelin-starred dining to tours focused on street food. Food tourism has its place in Western markets too, though it remains secondary to travel aimed at relaxation and related traditional motivators.

Other niches of interest:

- Religious travel overall is a niche, but one that is more prominent among travelers from India, Nigeria, and Saudi Arabia.
- Travelers from experienced and hyper-experienced markets want to increase exploration, health and wellness, and romantic getaways.
- Travelers from the US and UK want more for educational purposes.

Business trips and leisure trips are coming together in what is known as "bleisure" travel, which manifests in different ways. Sometimes people extend work trips to allow for leisure time, taking advantage of the opportunity to save money on the trip overall. Sometimes they are living the life of digital nomads, who can work from almost any location and at any time, making it easier to incorporate leisure into their schedules. (See "How Bleisure Travel Benefits MICE Locations.")

+ How Bleisure Travel Benefits MICE Locations

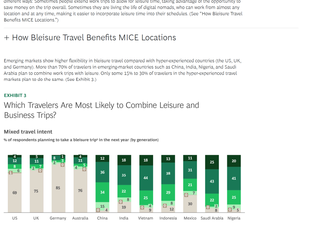
Emerging markets show higher flexibility in leisure travel compared with hyper-experienced countries (the US, UK, and Germany). More than 70% of travelers in emerging-market countries such as China, India, Nigeria, and Saudi Arabia plan to combine work with leisure. Only some 12% to 20% of travelers in the hyper-experienced travel markets plan to do the same. (See Exhibit 3.)

EXHIBIT 3

Which Travelers Are Most Likely to Combine Leisure and Business Trips?

Mixed travel intent

% of respondents planning to take a bleisure trip[1] in the next year (by generation)



Sources: The Traveler of the Future Survey, BCG, 2024.
Note: n = 4,000, across 12 countries. Numbers have been rounded.
[1]Includes domestic, worldwide, and digital nomad trips.

Five Traveler Archetypes

We cross-tabulated our survey results to create five archetypes of leisure travelers that encapsulate their needs and describe their foremost motivations and concerns. These archetypes tend to vary regionally. Understanding who they are and what they need is essential for travel companies' growth. (See Exhibit 4.) Here are the five archetypes:

- **Relaxation.** As we've seen, the desire for relaxation remains a dominant and consistent need. It's especially important to older generations. More than 60% of travelers who make up our relaxation contingent are 55 and older. Relaxation is also the top motivator for travelers in countries including Nigeria, India, Vietnam, and Saudi Arabia.
- **Meaningful Value.** People in this category want

- **Fun.** These travelers are all about freedom, escape, and enjoyment. Their motivations include exploration, food, adventure, and shopping. This archetype is particularly common in Germany and Australia.
- **Safety.** Travelers in this group value choices that keep them and their families safe and healthy. This encompasses health, the environment, and social impact. It's especially important for travelers from comfort, good value, and stress-free trips with family and friends. They crave fun connection, relief, and exploration. Travelers from Western countries place particular emphasis on these needs.
- **Uncompromising.** These travelers—many of whom come from emerging markets (such as China, India, Indonesia, Mexico, and Saudi Arabia) and are young (millennials and GenZers)—defy easy categorization. They want it all: relaxation as well as adventure, affordability as well as luxury, the best of a balance of comfort, value, and sustainability. Their desires reflect the "premiumization" and "extremes-are-things" trends that we observe; reasons that luxury is also on the rise.

EXHIBIT 4

The Characteristics of Five Traveler Archetypes

	Archetype overview	Top priorities	AI use*	Preferred destinations	Inspiration	Key behavior
Relaxation n = 832	Rejuvenation, freedom, and escape	• Good times with friends and family • Relaxed • Fun	23%	• Beach • City • Nature	Friends and family, internet research	Price-sensitive, saves more to travel
Fun n = 688	Uninhibited enjoyment	• Fun • Relaxed • Comfortable	33%	• Beach • City • Nature	Internet research, friends and family	Prefers nearby, willing to spend for quality
Safety n = 883	Security and health	• Friends and family • Safe choices • High-quality	47%	• Beach • Nature • City	Friends and family, internet research, media	Composes itinerary with carbon offsets
Meaningful value n = 866	Value and time well spent	• Value for money • Relaxed • Comfortable	38%	• City • Beach • Nature	Internet research, friends and family	Prefers well-known brands, cares more about sustainability because of income
Uncompromising n = 1,206	Freedom and quality	• Adventurous • High-quality • Value for money	54%	• City • Nature • Beach	Social media, internet research	Reduces travel for CO₂, info-overloaded

Low | Medium | High

Source: The Traveler of the Future Survey, BCG 2024.
*AI is used for travel planning and booking.
**AI is used for travel planning and booking.

AI Arrives. How Will Travelers Plan and Book?

People who aspire to travel already use multiple channels for inspiration and search. Although friends and family are the most influential, travelers also rely on online travel agencies (OTAs), search engines, and social media recommendations for travel ideas. To get travelers' attention—and dollars—companies should be able to engage in real-time, two-way communications and offer seamless booking across multiple channels.

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Our survey found that travelers—especially those from emerging markets—are using these new tools. Emerging-market travelers have the most browsing (such actions as interacting with social media and short videos) and the most general internet research, friend and retailer websites, and online advertising. Interestingly, they are also the most likely to say they often experience information overload.

Nonetheless, information abroad travel still abound and become all the more accessible. Search capabilities based on large language models (LLMs) are already reshaping traditional search behaviors in multiple categories, such as shopping, real estate, and automotive classifieds.[1] (See Exhibit 5.) Travelers now engage in deeper, more interactive conversations with LLM-based search agents such as ChatGPT and Gemini, significantly expanding their research phase. Rather than simply searching for a specific hotel or destination, they can ask detailed, exploratory questions and receive personalized inspiration. This frequently leads travelers to directly visit provider or destination websites, making it essential that these sites use search engine optimization to ensure that they will be found.

EXHIBIT 5

LLM-Based Search and Discovery Will Change the Value Chain

Classic value chain	Inspiration Browsing social media feeds	Search Looking for specific travel agency and destination	Consideration Reaching out to travel agency	Booking Booking the travel
LLM impact	Optimize to be found by AI-led discovery LLM profiles suggestions based on travelers' values and preferences	LLM search turns into end-to-end itinerary planning LLM narrows down choices, in conversational style, and can help to plan the complete vacation itinerary	Direct booking is possible in LLM-powered agents Travelers can book directly in LLM without visiting a travel agency website	

Having their own AI agents can help travel agencies stay relevant

Source: BCG analysis.

As a next stage, travelers can make even greater use of AI when it comes to planning and booking their trips. LLMs are evolving into comprehensive travel agents capable of performing complex itineraries. Travelers can converse with advanced AI systems like ChatGPT's new Operator offering, orchestrating everything from itinerary recommendations to eventual booking—with travelers also increasingly looking to AI for inspiration.

Looking forward, travelers will move beyond dedicated LLM search chatbots into social media environments like Instagram and Facebook. Here, travelers enter an AI integration and inspiration phase. Leveraging social interactions, likes, and viewed content, AI-powered travel agents can proactively suggest and facilitate trip planning directly within the social platforms. This contextually enriched browsing experience evolves into an immersive user behavior shift, transforming casual browsing into a highly personalized, seamless booking journey and fundamentally disrupting current travel discovery and booking paradigms.

In fact, GenAI search may pose an existential threat to travel companies as AI-driven search platforms take on a more active role in directing users to relevant offers—bypassing traditional aggregators. The pace of change remains uncertain, but companies should begin adapting.

> GenAI search may pose an existential threat to travel companies.

Travel aggregators such as Booking.com, Expedia, Tripadvisor, and GuideGeek are launching their own LLM-powered conversational booking agents to enhance the customer experience. By engaging users in conversations, the search process becomes highly personalized to individual preferences, providing relevant inspiration that can drive upselling opportunities and ultimately increase conversion rates. Most LLM trends observed in e-commerce, conversational search is on track to gradually replace traditional search and planning functionalities on travel websites, becoming the primary interaction method for users.

But the growing appreciation of AI does not negate the value of human interaction for travelers. (See Exhibit 6.) Interestingly, in countries where AI is considered particularly valuable for travel planning, human interaction is also especially important to travelers. Smart integration and handoffs between technology and the human touch will best meet travelers' needs. Winning platforms will combine AI-powered simplicity with personalization, cultural relevance, and hybrid engagement.

EXHIBIT 6

AI Versus Human in Travel Planning and Booking: Both Matter

While many people are using AI-powered tools or chatbots ...

% of respondents who say they use AI-powered tools or chatbots

... the human touch remains important during travel planning

% of respondents who say the human touch remains important

Countries		
US	31	45
UK	44	43
Germany	9	32
Australia	37	46
China	65	80
India	70	88
Vietnam	64	89
Indonesia	58	79
Mexico	56	76
Saudi Arabia	49	72
Nigeria	49	82

Source: The Traveler of the Future Survey, BCG 2024.
Note: n = 8,136 across 21 countries.

How Should the Industry Respond?

More people are taking vacations, and they are taking them more frequently. Our research shows that the number of overnight spent on leisure trips will only increase. So will the diversity of trips—and the use of tech-related platforms and channels.

Travelers have new expectations, behaviors, and decision-making patterns, all of which will continue to evolve. Overall, travel is becoming a modular, lifestyle-aligned ecosystem. Personalization and flexibility now shape the full journey. For travel companies, this means knowing more and doing more, by taking advantage of new technologies. They should consider their general strategies and specific tactical plans for attracting and pleasing the traveler of the future.

The Strategic Travel Plan

Know your emerging traveler. The next generation of travelers is more diverse than ever before. Growth is coming from travelers in emerging markets, solo travelers, and active travelers. Companies should research these archetypes to understand what travelers need and how to meet those needs. They can establish themselves as a service and destination of choice for particular millennial and GenZ segments.

Inspire differently. Personalization is key for travel companies seeking to attract the next waves of travelers. So is understanding where to reach them. Travelers are accessing travel information by tapping into AI-powered sites and feeds, social media, and influencers. Companies should carefully work to make those connections, too.

Embrace AI. Companies should make sure that travelers seeking information and booking opportunities through AI-powered channels can discover their companies and book with them. They should ensure that they can be found via LLM search, watch out for OTAs that might be entering their business space, and start investing in their own AI chatbots. These bots should be able to communicate with travelers and host them easily. One key role for the travel company's site is to improve the user experience and as social media sites to attract and convert new customers.

Leverage loyalty. Travel companies will benefit from developing an understanding of the evolving characteristics of loyalty programs. Travelers who fear multigenerational or leisure travel, for example, will seek new kinds of rewards. Companies should continue to leverage loyalty programs and their benefits to incentivize travelers to book directly.

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The Tactical Approach

Travel companies should take advantage of new technologies to facilitate everything from trip planning and booking to personalization to loyalty programs that ensure ongoing relationships and repeat business. A host should offer more than hotel amenities; for example—it should also be a technology-driven platform that leverage digital options and a curator that can deliver on a host of tailored travel experiences.

Along these lines, different travel sectors can take specific steps to prosper in the future of travel.

Insights for airlines:

- **Refine networks on the basis of new travel routes.** Now travel flows are shifting toward emerging markets in the East and away from traditional patterns. To capture growth, airlines should understand the importance of regional travel.
- **Review fleet requirements and deployments.** Analyze the current fleet and its deployment to optimize it. For example, narrow-body, long-range aircrafts enable direct access to secondary cities.
- **Make cabin configuration flexible.** Cabin configurations that are more modular and customization—offering, for example, the ability to create family configurations or business class or opportunities for premiumization—could be useful.

Insights for hotels and other lodging hosts:

- **Cater to bleisure travelers.** Companies should analyze detailed needs and corresponding options to integrate work-friendly amenities, like coworking lounges or meeting-friendly rooms, into leisure environments.
- **Adapt to multigenerational travel.** Consider how best to provide family configurations and tiered experiences (such as activities for teens and accessible amenities for seniors) to support diverse needs.
- **Ensure "findability" in AI-driven platforms to stay relevant in LLM searches.** Hosts should provide structured data and integrate with AI-driven platforms so that travelers can discover them.
- **Optimize loyalty programs.** Most players already offer loyalty programs. Further personalization can make offers more attractive and incentivize customers to book directly.
- **Capitalize on multicity tour demand.** Affluent travelers want to visit cities. Hotel chains can meet this demand with packages that feature multicity urban destinations.
- **Respond to the growth of vacation rentals with flexible models.** As the number of emerging markets and multigenerational travelers increases, the need for apartments and homes is likely to rise.
- **Optimize revenue management.** Companies can analyze the benefits of offering flexible workday rates to lifeless travelers, bundled family packages for multigenerational trips, and premium upgrades for high spenders.

Insights for cruise lines:

- **Establish emerging markets as cruise hubs.** Cruise operators should consider expanding deployment hound traditional hubs such as Miami and European ports to cities like Singapore and Dubai, where infrastructure and regional demand are rapidly evolving.
- **Attract first-timers.** Amid rising numbers of middle-class travelers and increasing travel intents—especially among millennials and GenZers—establishing an early presence would allow operators to capture loyalty and shape their new customer base. They can foster this early offerings to give first-time passengers a glimpse of the cruise experience while keeping barriers to booking low.
- **Leverage revenue management.** Modular cruise formats enable dynamic pricing by ship, segment, or cabin type. In the future, with advances in technical capabilities, flexible embarkation and disembarkation across different ports of a trip might help to boost fill capacity and apply differentiated pricing strategies—maximizing yield per available berth and catering to travelers with varied time and budget constraints.

Insights for online travel aggregators (OTAs):

- **Optimize the AI interface and findability.** With travelers increasingly using LLMs for trip inspiration and planning, traditional search engine optimization and advertising (SEO and SEA) are not sufficient anymore. Businesses should seek ways to refine their SEO and SEA tactics to ensure findability in today's LLM-based searches.
- **Actively monitor the evolution of LLM search engines.** OTAs that prepare for the future can avoid falling behind when the next wave of AI search disruption hits.
- **Prepare for conversational shopping to become the new standard.** Consumers expect a conversational, human-like interaction that leads to highly personalized offerings. Companies can leverage their own LLM-empowered agents to make trip planning more intuitive, convenient, and upsell.
- **Expand business lines to remain relevant.** OTAs can bolster their business lines, moving, for example, into the B2B space with GDS and API and advertising capabilities. Other possibilities: investing to provide convenience and services, exploring options for partnerships (with credit card companies, for example), and finding ways to form long-term relationships with customers via loyalty programs.

Insights for tourism boards and destination management companies:

- **Boost personalized marketing campaigns.** Travelers in emerging markets often rely on social media for travel planning. Companies have the opportunity to use AI to personalize ads and suggestions on these platforms, to capture higher clickthrough rates and shorter researches.
- **Develop regional tourism partnerships and short-trip incentives.** Because mass trips are demonic or regional, destinations can look for opportunities to attract volume while minimizing travel friction—for example, promoting "weekend getaway" packages.
- **Collaborate with tour operators to bundle curated experiences.** Tourism boards and destination commanders can collaborate with companies to create For example, culinary-focused tours in Vietnam or Indonesia can bundle local food tours with cooking classes and street food crawls, appealing to Asian travelers who prioritize gastronomy.
- **Team up with MICE agencies to attract bleisure travelers.** Companies can leverage options to position their destination as feature-ready by combining professional and leisure offerings. They can promote destination packages that include both high-quality MICE facilities and access to cultural or recreational experiences, such as cultural or wellness retreats, and guided tours to help develop infrastructure and messaging that enable seamless business-to-leisure transitions.

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