

Travel Market Report's Outlook on Global Travel Trends 2025

















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LETTER FROM THE EDITOR



Dear Travel Advisor,

The global travel industry is always changing. In recent years, tourism has been shaped not only by post-pandemic wanderlust but also by technological innovation, economic shifts, and changing consumer values. As we compiled our very first Outlook dedicated to global travel trends, one thing became abundantly clear: the desire to travel remains strong.

Today, Travel Market Report is proud to release the inaugural Outlook on Global Travel Trends. The information presented in the following pages is based on insight from almost 700 travel advisors, capturing a wide-angle view of where clients are headed, what motivates travel spending, and how advisors in the U.S. and Canada are adapting to meet demand.

While Europe remains the top choice for international travel, growth in other regions—particularly Asia-Pacific, the Middle East, and South America—suggests potential in less touristed areas. Today's travelers also want more for their money. Cultural immersion, culinary discovery, and adventure travel are no longer niche interests: They are driving demand.

Notably, this is also our first Outlook to explore how travel advisors are incorporating artificial intelligence into their work. While usage is still uneven, many advisors report that AI can streamline administrative tasks. And yet, the data also reminds us that relationship-building is the backbone of this profession; clients still rely on the expertise, intuition, and firsthand knowledge that only a trusted advisor can provide.

We hope TMR's first Outlook on Global Travel Trends offers inspiration and guidance to help grow your travel business. Whether you're seeking to diversify your product offerings, deepen your client relationships, or embrace new tools, the insights here can help you chart a more confident path forward.

Sincerely,

Daniel McCarthy

Editor-in-chief, Vice President, TMR



2025

- More than 9 out of 10 advisors said that they booked destinations in Europe. Advisors also booked trips to North America (87%) and Central and South America (58%).
- North America bookings contributed 39% to gross annual sales in 2024. Europe contributed 34%.
- Within Europe, Italy (85%) is the most popular destination. France (73%), Greece (68%), and U.K. (66%) make it to the top 4.
- The most popular Middle East and Africa destinations are South Africa (40%), Egypt (37%), Morocco (31%) and Kenya (24%).
- Peru (45%), Belize (36%), Argentina (33%), and Brazil (32%) are the most sought-after destinations in Central and South America.
- Most advisors (84%) said that their clients prefer beach/ocean vacations. Resort towns/all-inclusive resorts (72%) and urban/city centers (62%) are other preferred destination settings.
- Key motivators for taking vacations beyond North America are visiting a bucket-list destination (82%), celebrating a special occasion (71%), and exploring a historical site (67%).
- Two-thirds of the advisors said that all-inclusive resorts, boutique hotels, and luxury hotels are the most preferred accommodations.
- Seeking adventure travel (67%), culinary experiences (67%) and cultural immersion (62%) were the most common reasons why clients booked a trip.
- More than three-fourths of the advisors said that their clients took trips between 7 and 10 days long.
- About 7 out of 10 advisors said that their clients booked 6 to 12 months ahead of the trip.

← KEY FINDINGS



- Seniors, Gen X, and empty nesters continue to be the most in-demand clients for 9 out of 10 advisors. Reunions (86%), leisure groups (84%), and solo travelers (84%) are also popular.
- Roughly 4 out of 5 clients found the high cost of airfare a challenge while booking trips beyond North America. More than half were concerned about safety and security, and also overcrowded destinations.
- Almost 1 out of 2 advisors said that travelers' hesitation to take long-haul flights was a challenge while booking flights outside North America.
- Three-fourths of the advisors said that there was demand for pre- and post-cruise extensions.
- Most pre- and post-cruise stops were at Rome (76%), Barcelona (70%), and Amsterdam (55%) in Europe; Sydney (40%), Tokyo (31%) and Singapore (27%) in the Asia-Pacific region; Istanbul (27%), Dubai (25%), and Cape Town (23%) in the Middle East and Africa; and Buenos Aires (37%), Rio de Janeiro (26%) and Panama City (20%) in Central and South America.
- Word-of-mouth referrals and current/past clientele are the top lead generation sources, said 4 out of 5 advisors. Social media is catching up, said 1 in 2 advisors.
- Personal experience of the destination/product is the most preferred supplier support needed to sell destinations beyond North America. Advisors want FAM trips (80%), product/destination training (68%), and specialization training (52%).
- While 3 out of 5 advisors (60%) said that Al technology had helped them with improved booking and management tools, only one-third (34%) used Al for customized itinerary creation. More than half of the advisors (57%) said that they used Al for real-time flight and hotel availability.

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INTRODUCTION



Just as the industry was recovering from the pandemic, it is facing another challenge.

Geopolitical tensions and economic uncertainties will have an impact on tourism in the coming year.

However, within every challenge is an opportunity.

Travel Market Report's Outlook on Global Travel Trends, 2025 explores which destinations are shaping traveler preferences around the world.

Different destinations offer different benefits. While some may be well-known bucket-list experiences, such as European countries like Italy and Greece, others promise travelers an opportunity to explore beyond the familiar.

For example, the Middle East's tourism sector is surging. Total tourism spend in the region is expected to hit US\$350 billion by 2030. While much of this growth is attributed to business travel, the Middle East is also seeing unprecedented growth in leisure and lifestyle travel, driven by high-net-worth travelers.¹

The Asia-Pacific region also offers a range of unique experiences that appeal to travelers, such as local cuisine, shopping, and immersive activities. Exploring new destinations will also address a client's fear of overcrowded attractions.

In addition to being our first Global Travel Trends Outlook, this is also the first TMR Outlook that addresses travel advisors' use of Al technology.

With the world changing politically and technologically almost every day, we hope that this Outlook provides insights on how travel advisors can navigate the changes and growth of their businesses.



This online survey was conducted by Travel Market Report in April 2025. A total of 682 travel advisors from U.S. and Canada participated in the survey. Of this, 75% were from the U.S. and 25% were from Canada. The aggregated results and analysis in this report are based on the responses of these advisors.

Discrepancies or nuances in the analysis are highlighted, wherever applicable. In some charts, the total percentages may not add up to 100% due to rounding.





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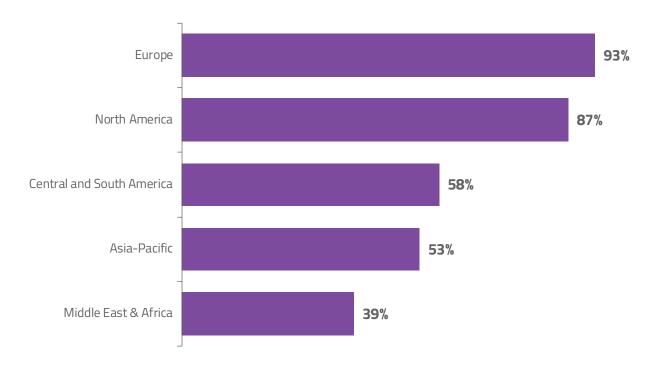




Europe has always been a popular destination among American and Canadian travelers, and 9 out of 10 advisors predict this trend will continue. North America is second on the list.

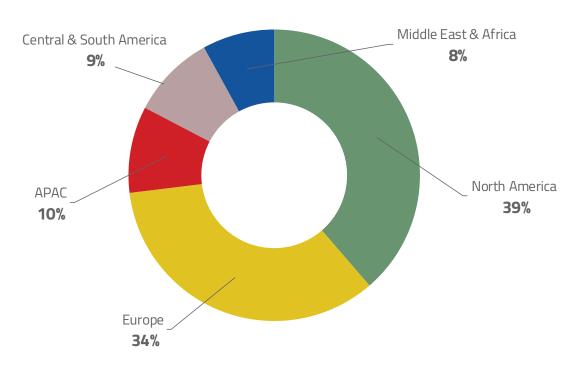
Over half of the advisors said that their clients opted for travel to Central and South America (58%) and Asia-Pacific (53%), compared to 39% of the advisors who booked travel to the Middle East and Africa.

INCIDENCE OF BOOKING TRAVEL BY REGION (%)





2024 ANNUAL GROSS SALES, SHARE BY DESTINATION (%)





The preference for Western destinations is also seen in the annual gross booking sales from 2024 with advisors saying that two-thirds of this share belongs to North America and Europe combined.

Asia-Pacific (10%), Central and South America (9%), and the Middle East and Africa (8%) account for the remaining one-third.

Advisors shared that interest in other regions is culture- and experience-specific, and these could be mined for more engaging trips. One advisor shared, "I am a small agency, with a comfortable number of loyal, mostly high-end, repeat clients. Europe tends to be their favorite destination, but I have done an African safari, as well as Peru and Costa Rica."

Another added,



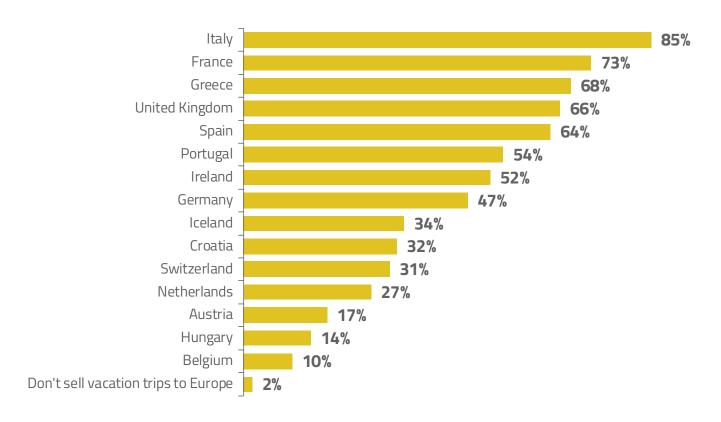
I booked a wine club group to South America in 2024, which skewed the percentage higher. Typically, my bookings to Europe and the Mediterranean are the highest of all sales.





Almost all advisors sell European destinations to their clients. Within Europe, Italy continues to dominate, with 85% of the advisors saying that their clients prefer it. France (73%), Greece (62%), the United Kingdom (66%), and Spain (64%) are also in the top 5. There has been more interest in Portugal and Ireland in the last two years. Compared to the data in TMR's European Travel Trends Outlook, 2023, the share of Portugal has risen from 42% to 54%, and Ireland's share increased from 45% to 52%.

POPULAR DESTINATIONS IN EUROPE







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After a fun-filled day in the sun, invite your clients to relax at one of many hotel havens, like the Tivoli Carvoeiro Algarve Resort, Iberostar Selection Lagos or Hotel 3HB Guaraná.



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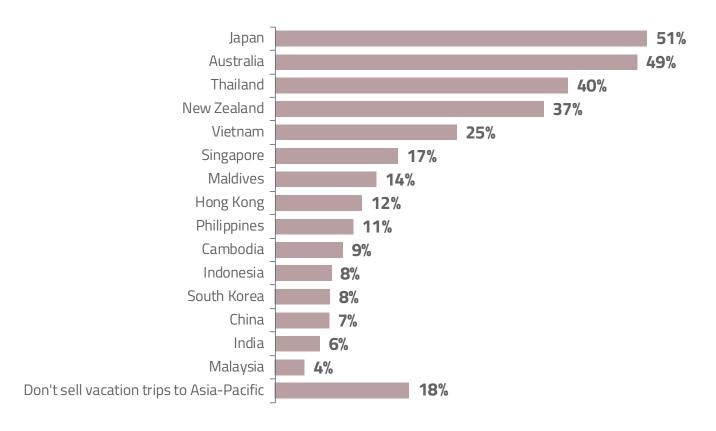




A weakening Yen and an enduring interest in Japanese culture and cuisine have contributed to a significant growth in tourism in Japan. Half of the advisors said that it's the most in-demand destination in the Asia-Pacific region, followed closely by Australia at 49%. Thailand (40%), New Zealand (37%), and Vietnam (5%) are also in the top five.

There is an opportunity to explore here for the 1 out of 5 advisors who said that they don't sell Asia-Pacific. In 2024, the region welcomed 33% more tourists than in 2023, making it the second most visited destination in the world, after Europe.²

POPULAR DESTINATIONS IN ASIA-PACIFIC

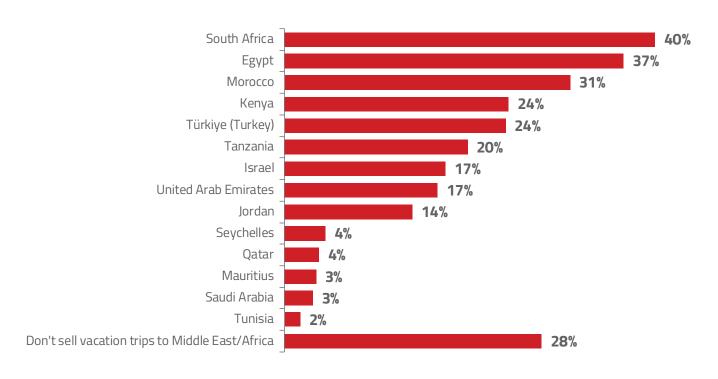






South Africa is the most popular destination in Middle East and Africa among U.S. and Canadian clients, said 2 out of 5 advisors. A similar share also said that Egypt was in demand, and one-third of the advisors said that Morocco was popular with their clients. Kenya (24%) and Türkiye (24%) were in the top 5 in this region. With as many as 3 out of 10 advisors stating they don't sell travel to the Middle East and Africa, this is certainly a region to be explored. Spending on tourism infrastructure in the Middle East is set to increase, and the availability of affordable luxury, diverse cultural experiences, and breathtaking landscapes,3 is adding to the region's allure.

POPULAR DESTINATIONS IN MIDDLE EAST & AFRICA



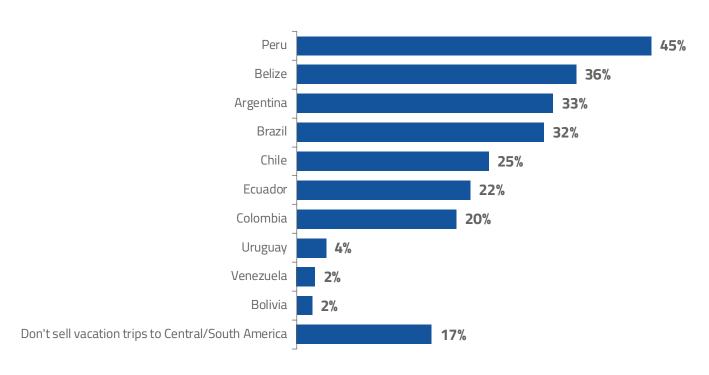
^{3.} https://iol.co.za/travel/africa/2024-12-03-why-africa-and-the-middle-east-are-emerging-as-top-travel-destinations-in-2025/



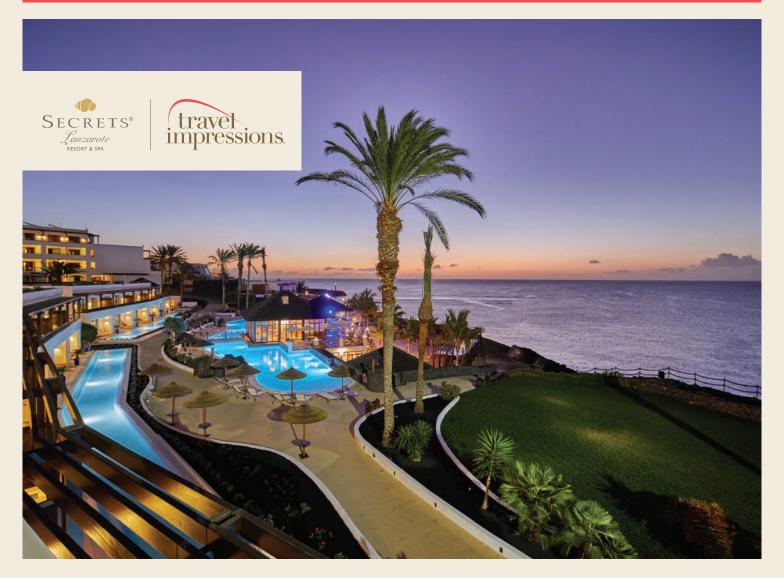


The most popular destination in the Central and South America region is Peru, driven by its rich history and diverse landscapes. Belize (36%), Argentina (33%), Brazil (32%) and Chile (25%) are also popular destinations in the region.

POPULAR DESTINATIONS IN CENTRAL & SOUTH AMERICA



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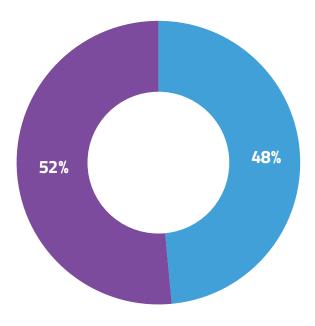
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Packing in multiple countries within the same region is both time- and cost-effective, since returning to the region costs clients another trip. Half of the advisors are already encouraging their clients to book a multidestination trip, and the opportunity is great for the remaining 48% who don't.

INCIDENCE OF TRIPS TO DESTINATIONS IN SINGLE-COUNTRY VS. MULTIPLE COUNTRIES



Destinations within only one country

■ Destinations in two or more countries

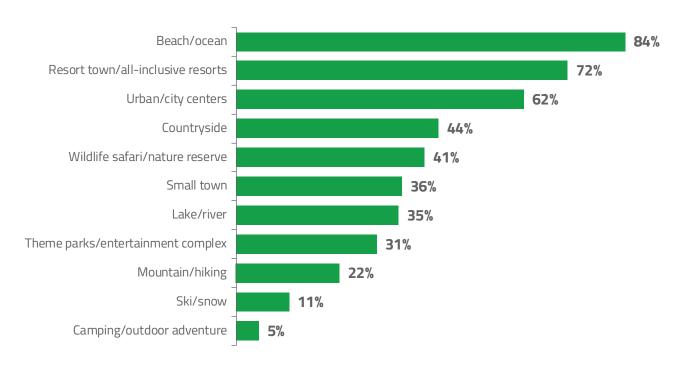




In terms of destination settings, most advisors (84%) said that their clients preferred a beach/ocean destination. Resort towns/all-inclusive resorts came next, said 7 out of 10 advisors.

One-third of the advisors said their clients visit theme parks or an entertainment complex, while 2 out of 5 advisors said that countryside and wildlife safaris/nature reserves were also in demand.

PREFERRED DESTINATION SETTING

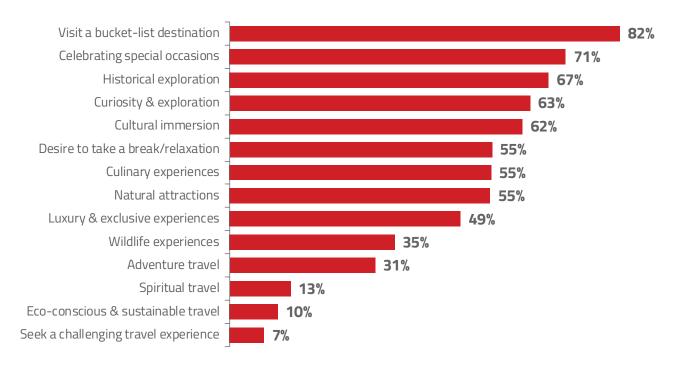






Crossing off a bucket-list destination was the most important reason for taking a vacation, said 8 out 10 advisors. Celebrating special occasions (71%) and learning more about the world—through historical explorations (67%) or cultural immersions (63%) were other prominent factors. Half of the advisors said that all their clients wanted from the vacation was to take a break or relax.

KEY MOTIVATORS FOR TAKING VACATIONS BEYOND NORTH AMERICA





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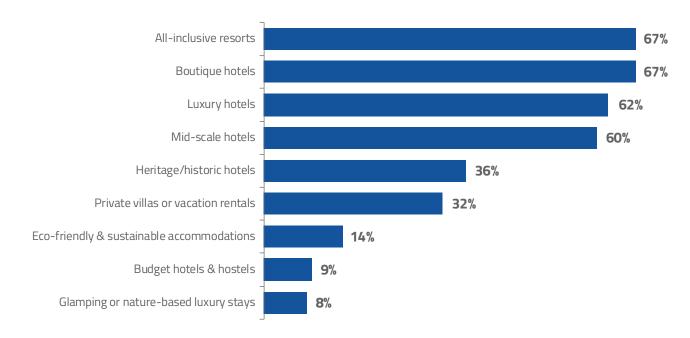




The most preferred accommodation for clients traveling outside of North America are all-inclusive resorts and boutique hotels, with 67% of the advisors saying that these were the most in-demand choices.

The accommodation preferences show that clients lean towards luxury and exclusive options, with the maximum benefits. Predictably, the most low-cost accommodations, like budget hotels and hostels, are the least picked options.

ACCOMMODATION PREFERENCES

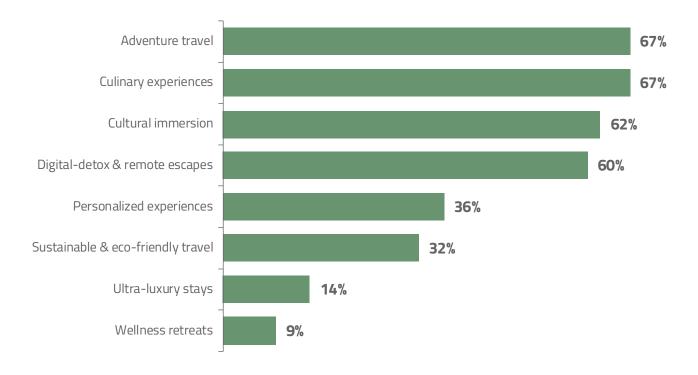






Advisors said that their clients travel across the world seeking adventure (67%), new culinary (67%), and cultural (62%) experiences. Nearly two-thirds of the advisors said that their clients also wanted a digital-detox and remote escape from a hyper-connected world.

PREFERENCES FOR IN-DESTINATION ACTIVITIES & EXPERIENCES



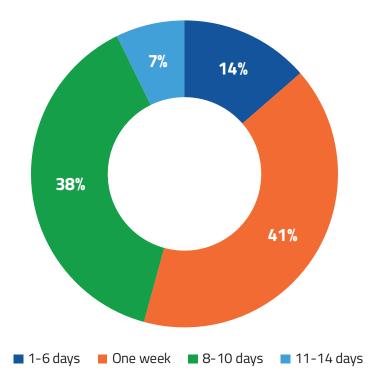




Week-long trips remain the most popular length (41%). For 8 out of 10 advisors, the average length of trip ranges between seven to 10 days. Only 7% of the advisors said that their clients take vacations that are 11 to 14 days long.

A little over one-sixth (14%) of the advisors said that their clients take vacations that are shorter than one week (six days or fewer). This might be an opportunity for advisors to convert these clients into taking week-long trips, perhaps by pointing out schedules and itineraries that could make this possible.

LENGTH OF TRIP



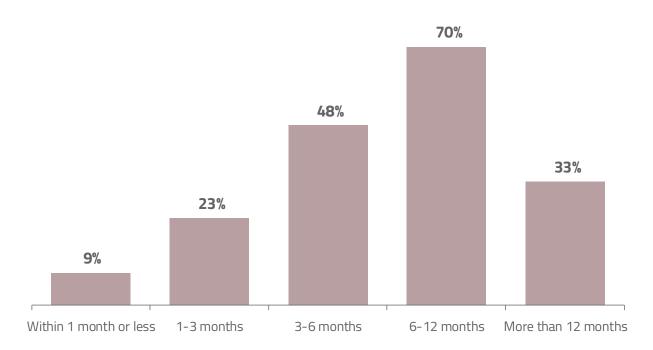




What is the best time to reach out to clients for vacation bookings? Nearly half of the advisors said that their clients book 3 to 6 months ahead of the travel, while 7 out of 10 advisors said that a period between 6 to 12 months was ideal. One-third of the advisors said that their clients typically booked more than a year in advance for their vacation.

The variation could also be a factor of the kind of trip and the destination. With cruises being much in demand, many cruise lines are booked a year in advance. And those looking for luxury and exclusive options in tourist hotspots are also better off planning ahead.

ADVANCE PURCHASE WINDOW





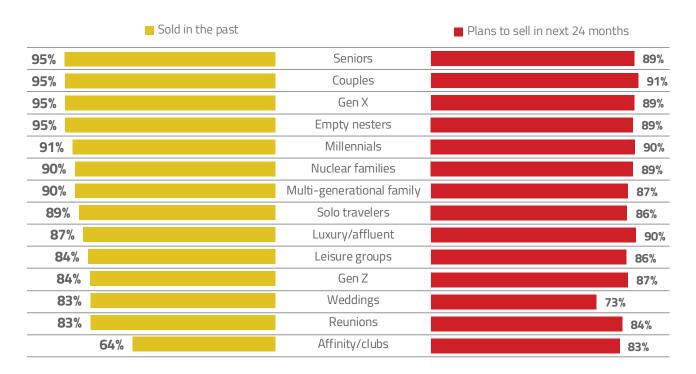


As noted in previous TMR Outlooks, advisors are keen to sell to all client groups, with seniors (89%), couples (91%), and empty nesters (89%) being at the top of the chart

Most advisors also sell to, or plan to sell to, solo travelers (86%) and leisure groups (86%). The biggest gap is between advisors who have sold to affinity groups (64%) versus advisors who plan to sell to affinity groups (83%).

Whether it's travelling for pickle-ball vacations or women-only cruises, there's a huge opportunity in selling to affinity groups and clubs. The work here might be to identify vacations that cater to specific needs and interests, and then market these trips to clients.

PAST PERFORMANCE & OUTLOOK BY CLIENT SEGMENTS





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High airfare costs and limited flight options (80%) and safety/ security concerns (61%) are the top client concerns when taking trips outside of North America, advisors said. Other factors such as visa requirements and local transportation come next but occupy a smaller share.

One advisor said, "Political unrest and the attitude towards Americans in light of recent tariffs and safety [are some of the challenges faced while taking trips outside of North America]."

In addition to costs of airfare and security concerns, clients were also concerned with factors that affected the quality

of their experience. Approximately half of the advisors said their clients found overtourism and crowded attractions a challenge. A third of the advisors said that their clients faced language barriers in trips outside of North America, which posed a challenge to their experience.

Meanwhile, 52% of advisors said the rising cost of accommodations outside of North America posed a challenge to selling trips. A similar share (47%) also said that their clients were averse to taking long-haul flights.

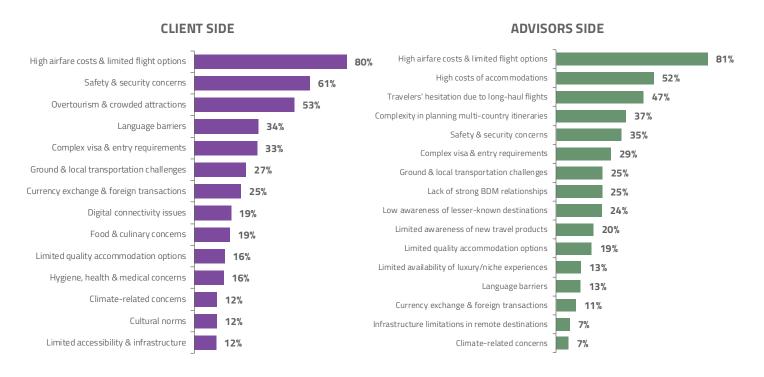
More than one-third of the advisors shared that complexity of planning multi-destination itineraries was a challenge.

In addition, one advisor shared,



The biggest issue is accessibility. Lots of older couples want to travel, but one will have limited mobility yet want to see the 'famous' sites. It's hard to find solutions for them.

CHALLENGES FACED WHILE TAKING TRIPS TO DESTINATIONS BEYOND NORTH AMERICA







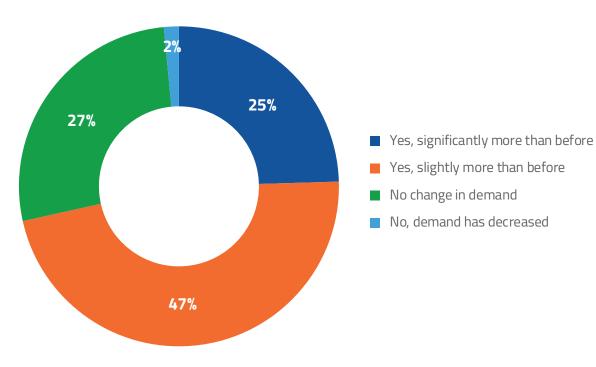
With many clients traveling to tick off a bucket list experience, it's no surprise then that they'd want to extend their trip beyond the cruise just a little bit longer to explore more.

Almost three-quarters of the advisors said that there is an increase in demand for pre- and post-cruise extensions.

One advisor shared,

I see people now saying, 'Well! We're in this place and probably won't be back, so let's stay before or after to explore.' This has me thinking outside the box and my ideas are sometimes crazy... a cruise promo that includes like a day pre- and post- stay.

DEMAND TRENDS FOR PRE- & -POST CRUISE EXTENSIONS





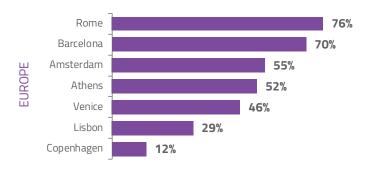


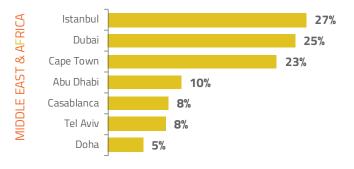
What are the destinations that are most likely to sell for a post-cruise vacation? While there are top spots in each region, Europe vacations are the most popular.

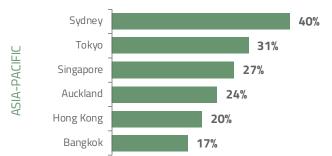
Advisors said that Europe, Rome (76%), Barcelona (70%), and Amsterdam (55%) are the most popular. In Asia-Pacific, 2 out of 5 advisors said that Sydney was the most preferred stop, followed by Tokyo (31%) and Singapore (27%).

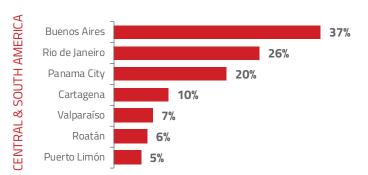
In the Middle East and Africa, the top three destinations were Istanbul (27%), Dubai (25%), and Cape Town (23%). And in Central and South America, cruising clients were most likely to extend their vacations by stays in Buenos Aires (37%), Rio de Janeiro (26%), and Panama City (20%).

POPULAR CITIES FOR PRE- & -POST CRUISE EXTENSIONS







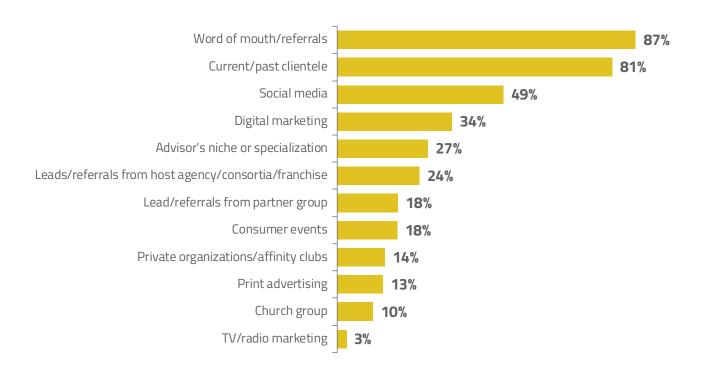


The one steady trend in the industry has been the advantage of a good reputation. Word of mouth (87%) and current and past clientele (81%) continue to be the top lead generation sources.

As the client base moves towards the more digitally active Millennials and Gen Zs, social media is also emerging as a lead source.



TOP LEAD GENERATION CHANNELS



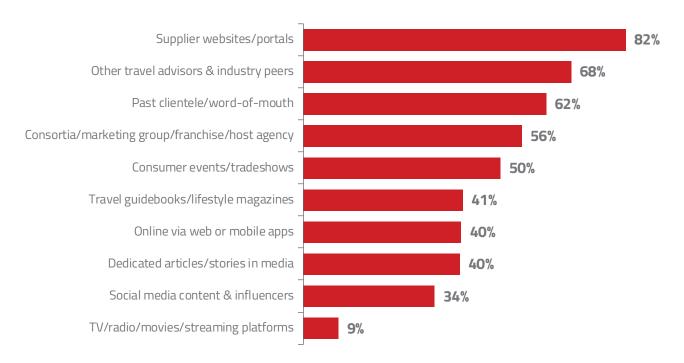




Where do advisors go to research vacation trips and activities they can sell to their clients? Many advisors said that they try their best to experience these destinations personally. The top choice is direct from the suppliers: 82% of the advisors said they use supplier websites and portals.

Two-thirds of the advisors said that other travel advisors and industry peers are good information sources. Half of the advisors said that consumer events and tradeshows are also useful for learning about vacation trips.

RESEARCH/INFORMATION SOURCES USED BY ADVISORS







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Considering how important it is for advisors to personally experience a destination, FAM trips are, unsurprisingly, the supplier support that most advisors (80%) want. Almost 7 out of 10 advisors also said that product or destination training would also be helpful, and just over half wanted specialization training.

Interestingly, 3 out of 10 advisors also expressed a desire for AI training. Embracing AI tools and technology to service clients faster and more efficiently could benefit travel advisors without losing the human touch and personal relationships that this industry is built on.

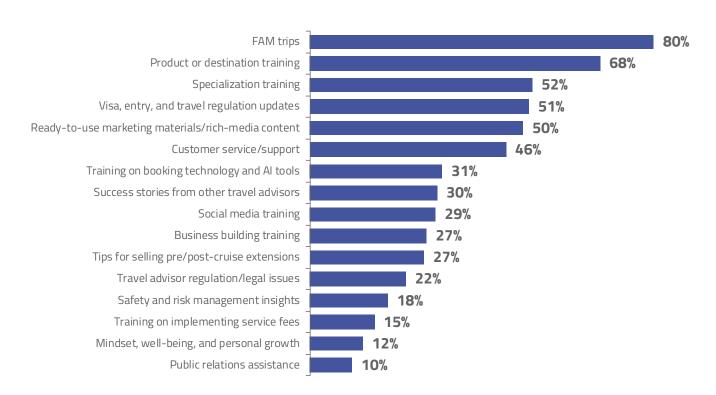
Some of the advisors did bring up issues that suppliers should think about, such as accessibility for those with disabilities to printed brochures for those who are averse to reading everything digitally.

On another note, one advisor shared,



[I'd like] The ability to have more FIT suppliers that are more reasonable in cost. [I] Would take a lesser commission for better options and a one-stop supplier. This is more prevalent for complex trips in Europe.

SUPPLIER SUPPORT NEEDED TO BETTER SELL DESTINATIONS BEYOND NORTH AMERICA







As Al adoption increases within the travel industry, many advisors are embracing new tools to help them service their clients with greater ease and efficiency. Improved booking and management tools top this list for 3 out of

5 advisors. A similar share of advisors has also seen the advantage of AI in tracking real-time flight and hotel availability. Just under half of the advisors (45%) have also used AI to simplify complex multi-destination trip management.

While many advisors shared concerns that the current Al technology is often inaccurate when used for research, this is a fast-developing technology and therefore it would be best to learn how to use it and keep up with the latest Al trends.

One advisor said,



Travel booking tech is still way behind other industries. Al has been helpful creating packing lists and social media posts, but definitely not for trip planning—too many errors or outdated material.

IMPACT OF AI & TECHNOLOGY ON TRAVEL PLANNING AND SALES



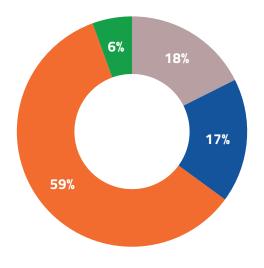
Over one-third of the advisors who participated are affiliated with agencies, while the remaining are Independent Contractors (ICs).

Around a quarter of all advisors have less than 5 years of experience in the industry. Over one-third of the advisors have spent 6 to 20 years in the industry, and 43% have over 20 years of experience. Agencies skew toward experienced advisors, with 67% of advisors having over 20 years of experience versus just 10% with five years or less.

Not surprisingly, there are more ICs with 6 to 20 years of experience compared to the average.

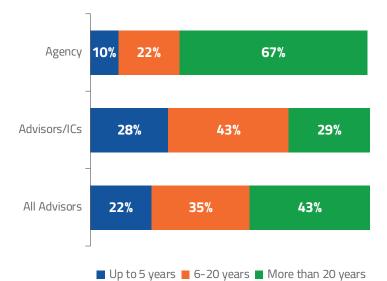


TRAVEL ADVISORS BY BUSINESS TYPE, SHARE (%)



- Retail travel agency with a storefront location
- Retail travel agency with an office/non-storefront location
- Independent contractor/advisor working with a host agency/franchise/consortium
- Independent contractor/advisor working on your own (not affiliated)

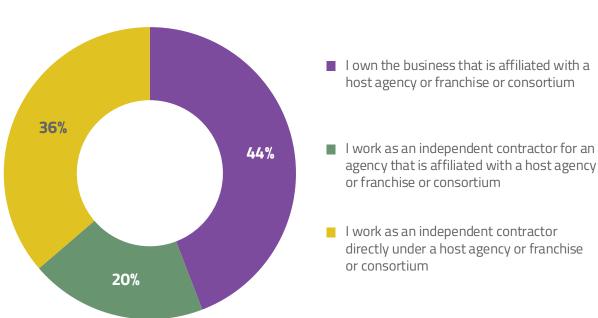
TRAVEL ADVISORS BY YEARS OF **EXPERIENCE, SHARE (%)**





Close to 1 in 2 advisors said that they own the business affiliated with a host agency, franchise, or consortium. Nearly 40% of the advisors said that they work as an independent contractor directly with a host agency, franchise, or consortium, while 20% of the advisors said that they work as an IC for an agency that is affiliated with a host agency, franchise, or consortium.

AGENCY/ADVISOR POSITION, SHARE (%)

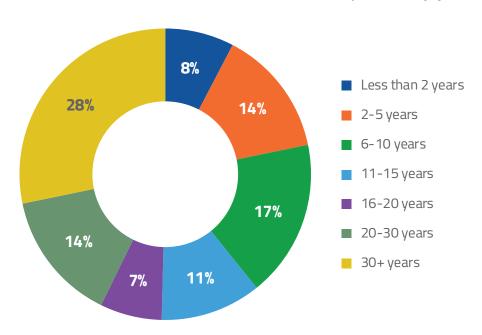




Under one-quarter of the advisors said that they have less than 5 years of travel sales experience. Reflecting the trends seen in the previous TMR Outlooks, the share of advisors joining the industry is increasing slightly, while the share of veterans is decreasing slightly.



YEARS OF TRAVEL SALES EXPERIENCE, SHARE (%)





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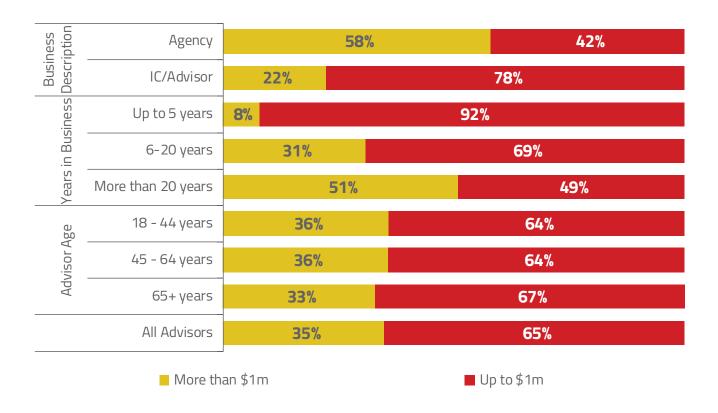


Agencies are typically the high grossers, with nearly 60% making more than \$1 million annually.

While advisor age does not appear to impact performance, experience does. Those with more years in the industry typically sell more. While approximately one-third of the advisors with 6 to 20 years of experience said that they made \$1 million, half of the advisors with over 20 years of experience reached this mark.

It's heartening to see that across age and experience bands, the share of advisors making more than \$1 million is increasing. This share is 35% in the current Outlook, while it was 26% in the TMR Outlook on Expedition Cruises, 2024.

ANNUAL GROSS SALES BY BUSINESS TYPE, YEARS IN BUSINESS & ADVISOR AGE, SHARE (%)

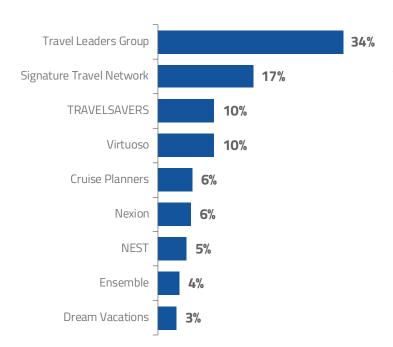


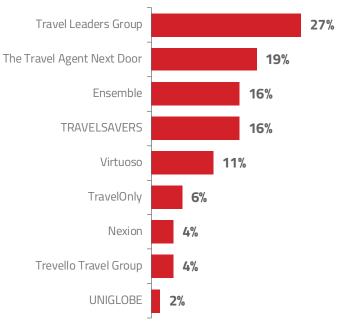


One-third of American advisors said that they are affiliated with Travel Leaders Group, and 17% said that they were affiliated with Signature Travel Network. TRAVELSAVERS and Virtuoso came next with 10% each. In Canada, most advisors said they were affiliated with Travel Leaders Group (27%), The Travel Agent Next Door (19%), Ensemble (16%), and TRAVELSAVERS (16%).

AGENCY/ADVISORS AFFILIATION—U.S.

AGENCY/ADVISORS AFFILIATION—CANADA





CONCLUSION



In a post-pandemic world, travel remains a priority for many living in the U.S. and Canada. Consumer preferences have shifted toward memory-making experiences over consumer goods.⁴ It has been estimated that the industry is likely to grow at a compound annual growth rate (CAGR) of 7.8% from 2025 to 2030.⁵

This atmosphere is the perfect opportunity for travel advisors to offer clients new avenues of exploration.

While Europe continues to be a favorite among travelers, there are many destinations around the world, especially in Middle East and Asia, that also offer rich cultural, culinary, and adventure experiences.

This TMR Outlook also showed that there is an opportunity to sell multi-country/destination trips to clients who want to get the most out of their travels.

Over the last couple of years, there has been a shift away from focused client segments. From empty nesters to Gen Zs, advisors are looking to sell to everyone. In this Outlook, we wish to underscore the opportunity that lies in reaching out to affinity groups and clubs. From special cruises to travel trips for specific sports or tours of historical significance, dipping into affinity groups is likely to pay rich dividends.

An understanding of what the client wants continues to be the most important tool in the advisor's kit. And this relationship and the trust in the advisor's guidance will continue to thrive, even with the coming of Al technology.

In fact, Al can become a tool that helps advisors service their clients with more efficiency. We hope that suppliers and advisors are encouraged to collaborate with each other for building tools that help the growth of the industry.

And lastly, in this Outlook too, advisors have shared how valuable FAM trips and product and destination training are. These help them understand the experience that their client will have and pitch one that suits their needs the best.

We hope that this TMR Outlook on Global Travel Trends, 2025 speaks to the suppliers and advisors, with insights on how they can grow together for the industry's benefit.

 $^{{\}tt 4.\ https://home.barclays/insights-old/2024/06/making-memories--the-rise-of-the-experience-economy/}$

^{5.} https://www.grandviewresearch.com/industry-analysis/us-canada-travel-market-report





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