

# Tourism Outlook: 2026 and Beyond

Bing Pan, Ph.D. ([bingpan@psu.edu](mailto:bingpan@psu.edu))

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# What determine tourist volumes?

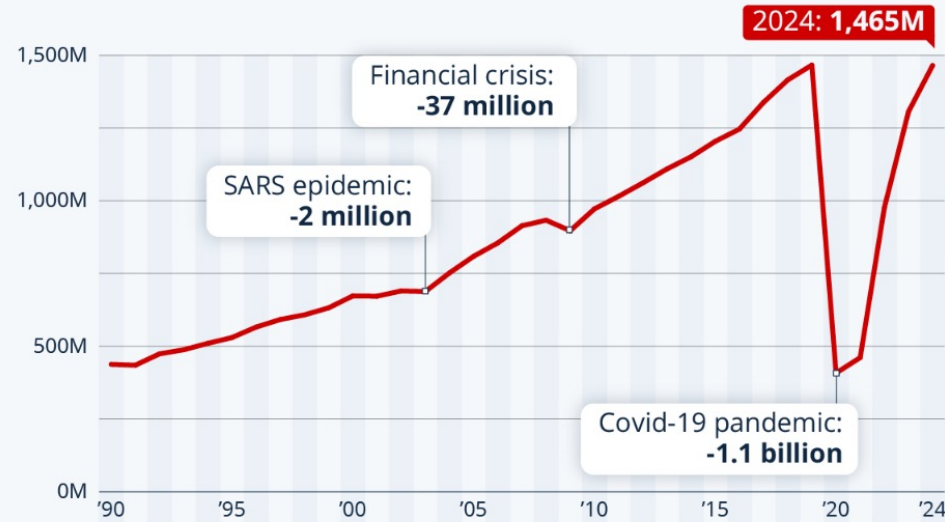
- Income level of origin country
- Population of the origin country
- Relative price in the destination
- Travel cost
- Political stability and security
- Destination image
- Visa requirements and convenience of customs

*Perceived!!*



# Full Recovery: Global Tourism Returns to Pre-Pandemic Level

International tourist arrivals worldwide since 1990



Source: UNWTO

Global tourism grew 5% in the first half of 2025, expected to continue in the rest of the year and surpass 2019 level.  
-- UNWTO

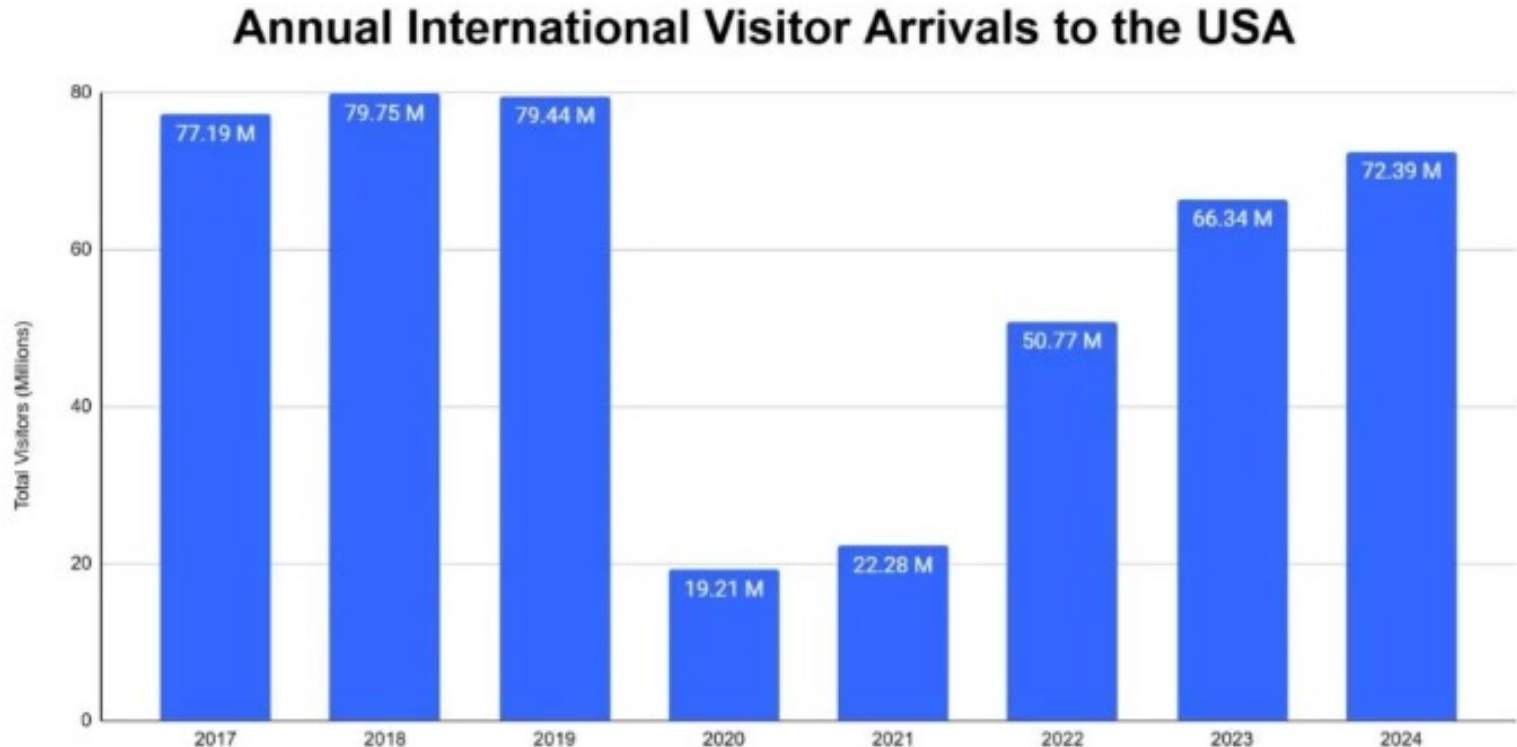


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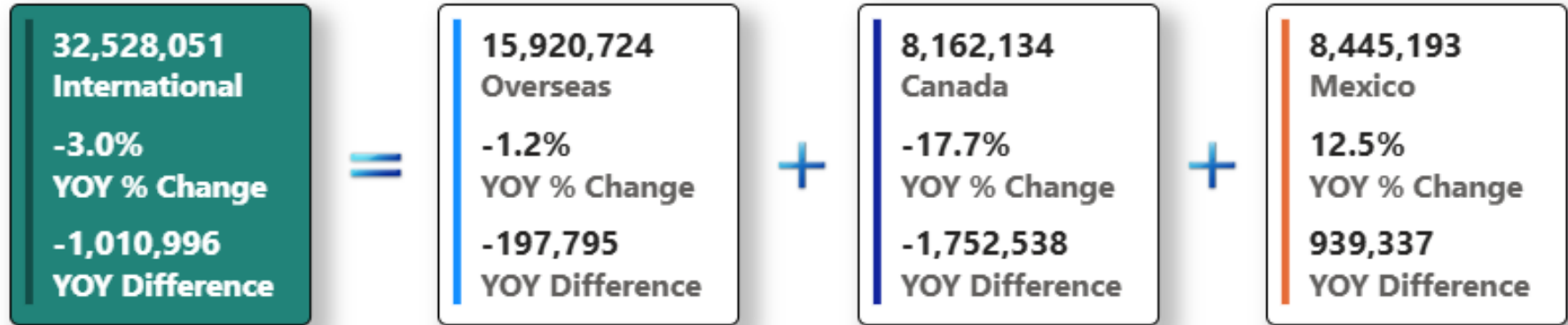
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# Recovery of U.S. International Visitors – International Trade Administration



# The Year of 2025 is not looking good.

## Current State of Visitor Arrivals to the United States (Year-To-Date) - June 2025



**USTA forecast -6.3% in 2025; NTTDO forecasted 6.5% increase**



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# Regional differences in recovery

From 2019 to 2024:

India: 149% level

Italy: 103%

Dominican Republic: 114%

Colombia: 113%

Ecuador: 108%

China: 57% level

South Korea: 74%

Canada: down -18% in 2025 from 2024



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# Factors

- Strong U.S. dollar
- More strict U.S. immigration and visa policies
- Slow visa processing time
- Geopolitical and political tensions



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# Forecast for 2026 and beyond?

- Inbound arrival will be up from 2025 level and reach pre-pandemic level due to some Mega-events (FIFA 2026 and America's 250<sup>th</sup> Anniversary in 2026)
- East Asian markets will be staying at low-levels, but Canadians will come back
- Economic decoupling, tribalism, and climate challenge will put pressure on global tourism growth in near future....
- Is there an international tourism crisis?



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# Further explosion of GenAI use

53% of AI users rely on it to find attractions and restaurants;  
47% use it for travel inspiration and transportation planning;  
88% use AI services for overall booking and travel experience.  
- Adobe report (2025)

Customer service chatbots increased productivity

Content generations for marketing and communication



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# AI is still not there yet...

- **Nonexistent Sacred Canyon in Peru:** AI placed tourists at an altitude of over 4,000 meters (about 13,000 feet) without proper resources, such as oxygen or phone signal, requiring intervention from local guides. – BBC News
- **AI sent tourists to a mountain due to incorrect opening time** – BBC News



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# We need to get ready...

Past: search algorithms and algorithmic marketing; the filter bubble and the Mathew effect

Future: communicate with your customers but also for AI models



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## Preparation for AI revolution

- Embed AI in the tourist research and planning process
- Mandatory AI literacy training
- Automate marketing and reservation with AI agents
- More authentic and high-touch hospitality service will be even more valued: marketing for non-AI service



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