



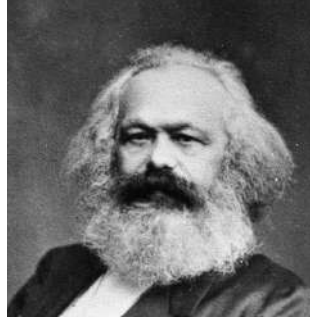
Hospitality Exchange

Top 10 Tourism Trends that will shape the future by 2030

Belfast, 15 October 2025

Yannick Cabrol,
EY Future Destinations Leader in Europe

After this presentation you will know which public figure will have the biggest influence on tourism



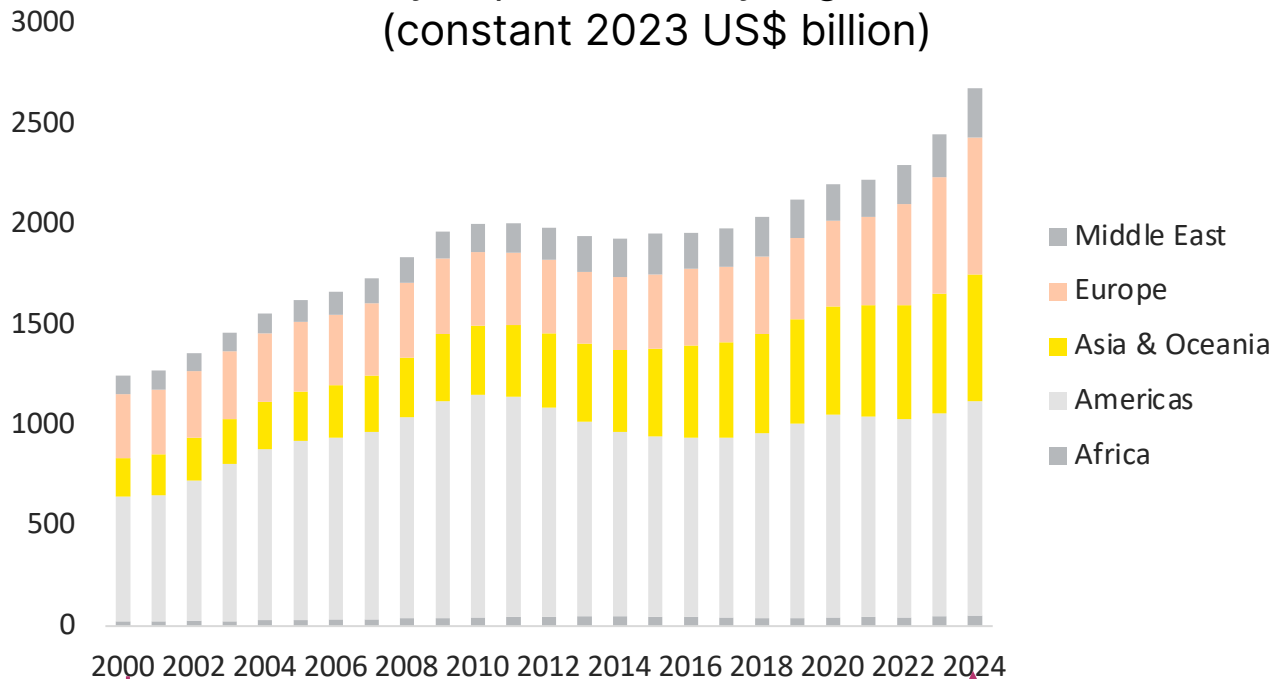
Trend #1: The dictators' era = less global and more regional & domestic tourism



The End Of History?

This summer an article by Francis Fukuyama became all the rage in Washington. In it he argued that liberal capitalism had triumphed, that history had finally come to an end.

World military expenditure, by region, 2000-2024
(constant 2023 US\$ billion)

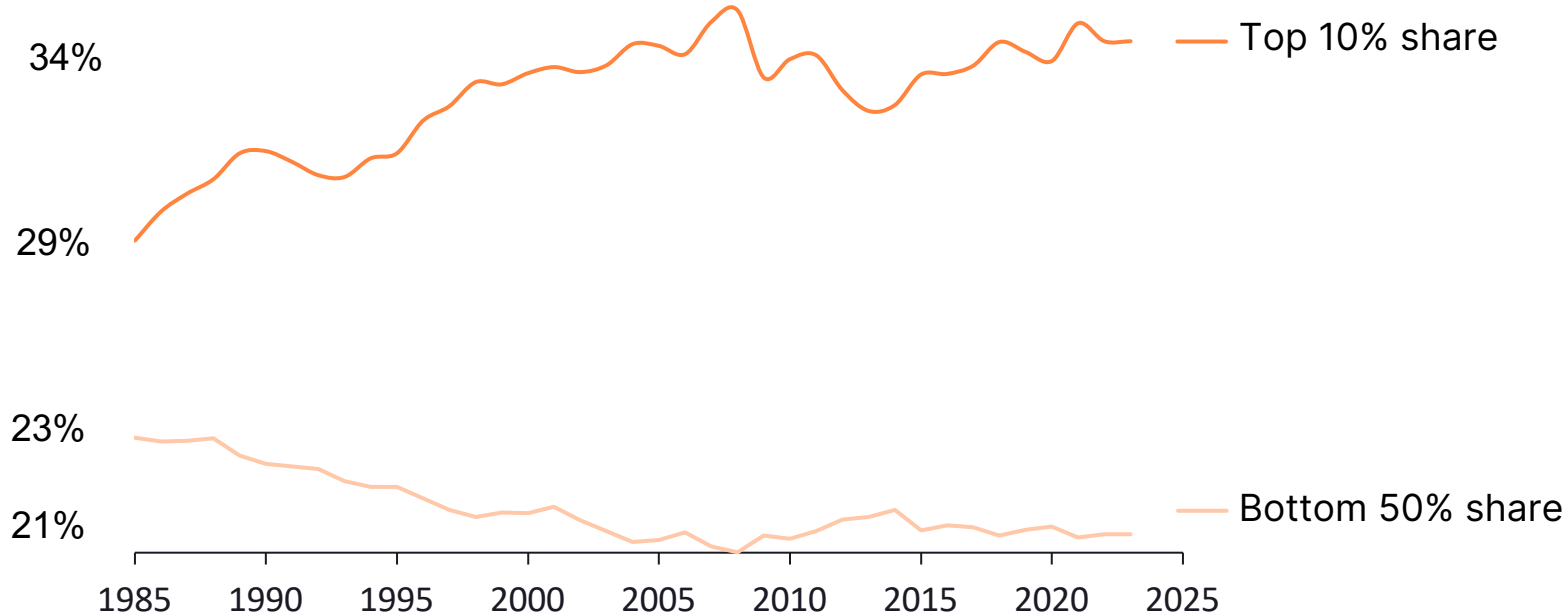


+64%

Source : SIPRI Military expenditure Database, April 2025

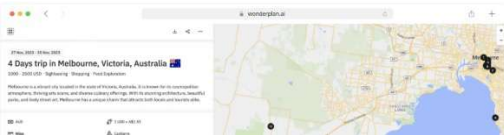
Trend #2: The Piketty effect = a more polarized tourism market than ever

Share of income of the population category in total income in France



Trend #3: Man vs AI = “A la carte” demand... but a bigger focus on peer recommendations

Craft Unforgettable Itineraries with AI Trip Planner

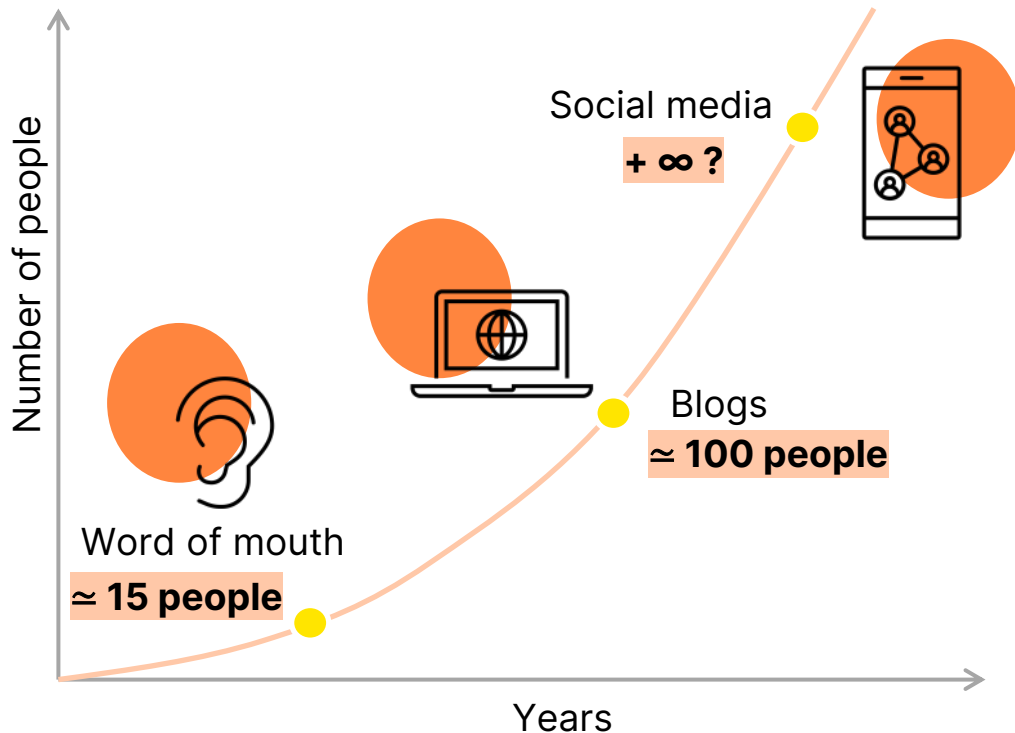


Among those who haven't used an AI tool,



55%

say a lack of trust is their primary barrier



Source : Kantar research study, 10,000 consumers across 10 countries, 2024

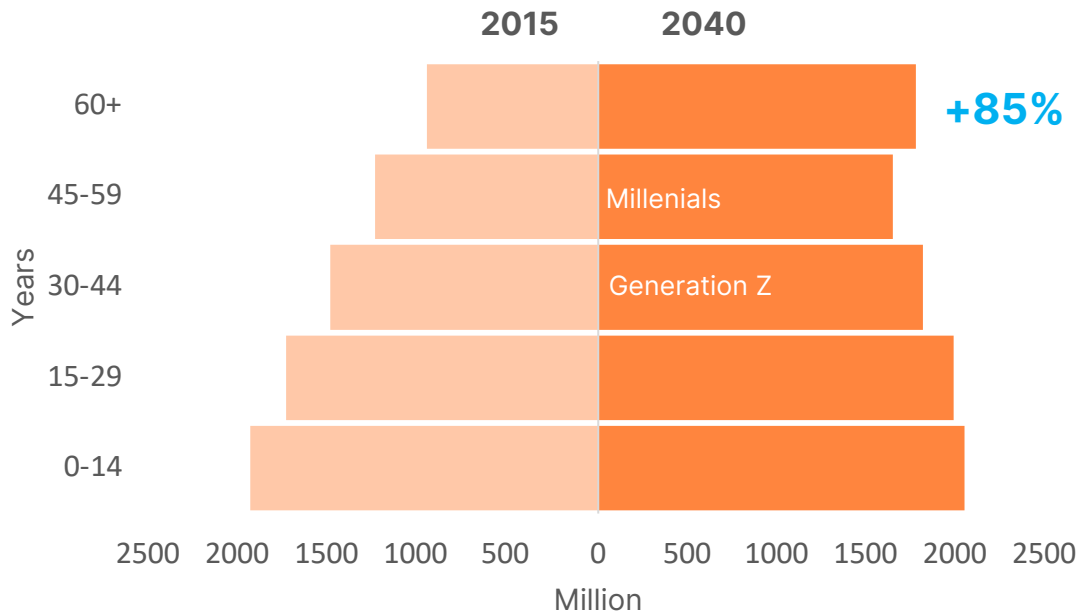
Trend #4: The baby bust = higher focus on safety vs adventure

THE THRILL OF EXTREME TOURISM



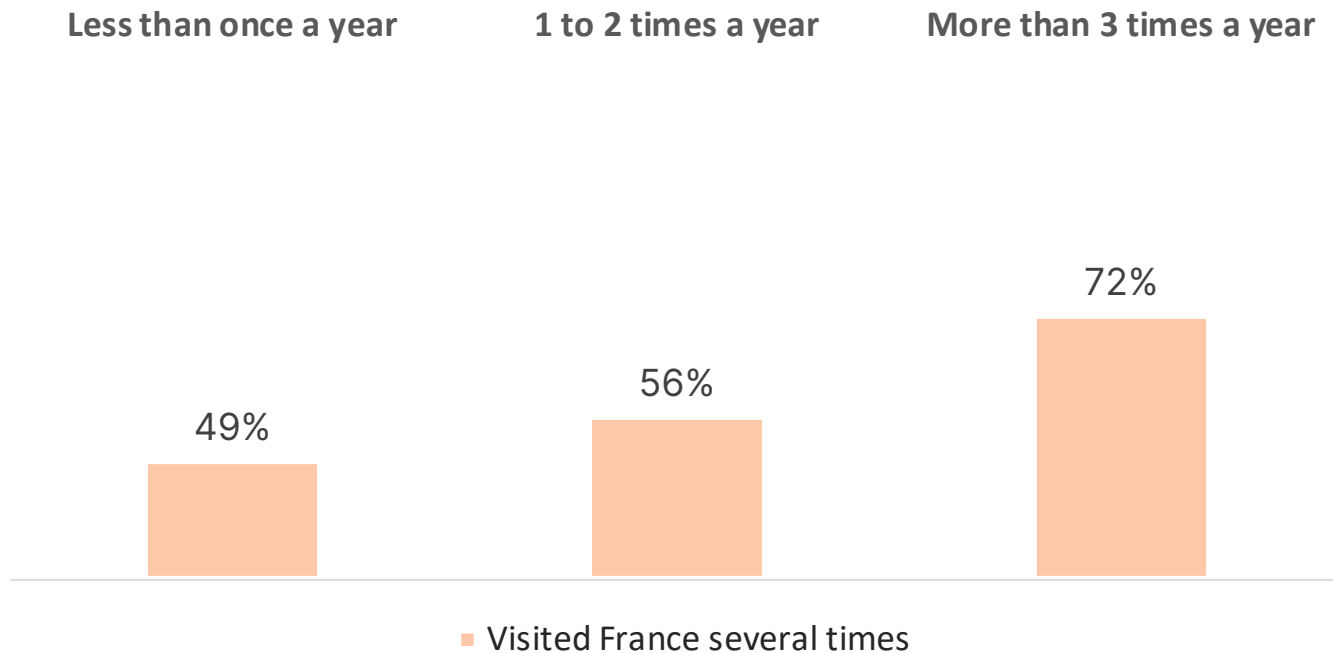
*"Dance Like There's
No Tomorrow"*

World Population – Age composition



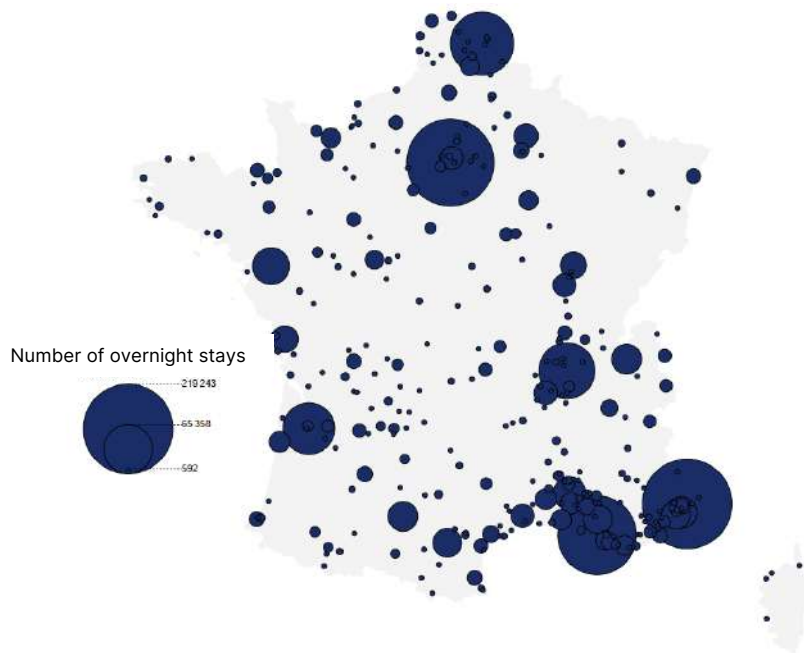
Trend #5: The Netflix boom = bigger importance of TV Shows

Impact on tourism in France depending on the frequency of watching French films or series

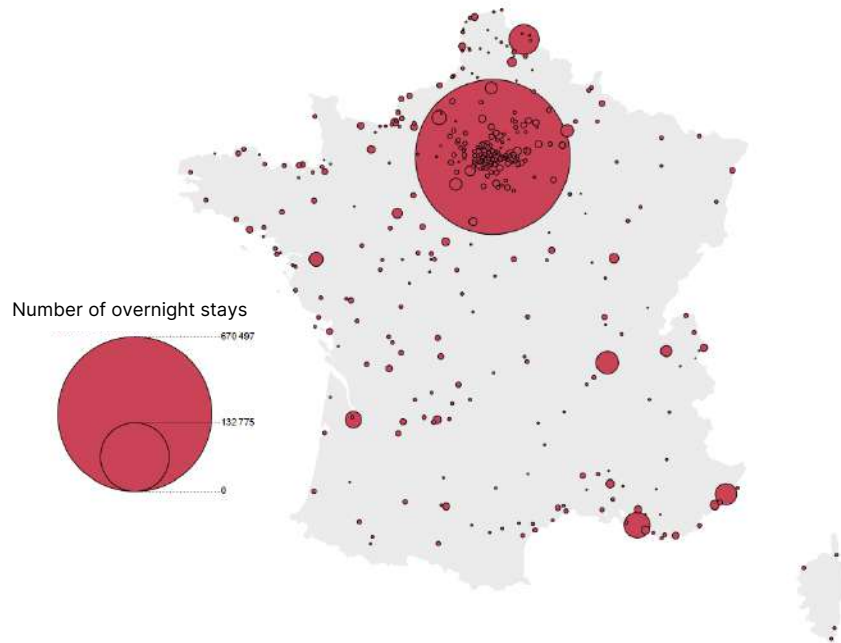


Trend #6: Small (and very big) is beautiful = stronger emphasis on some major events and local experiences

Distribution of overnight stays in France by British spectators who attended a match of the 2023 Rugby World Cup

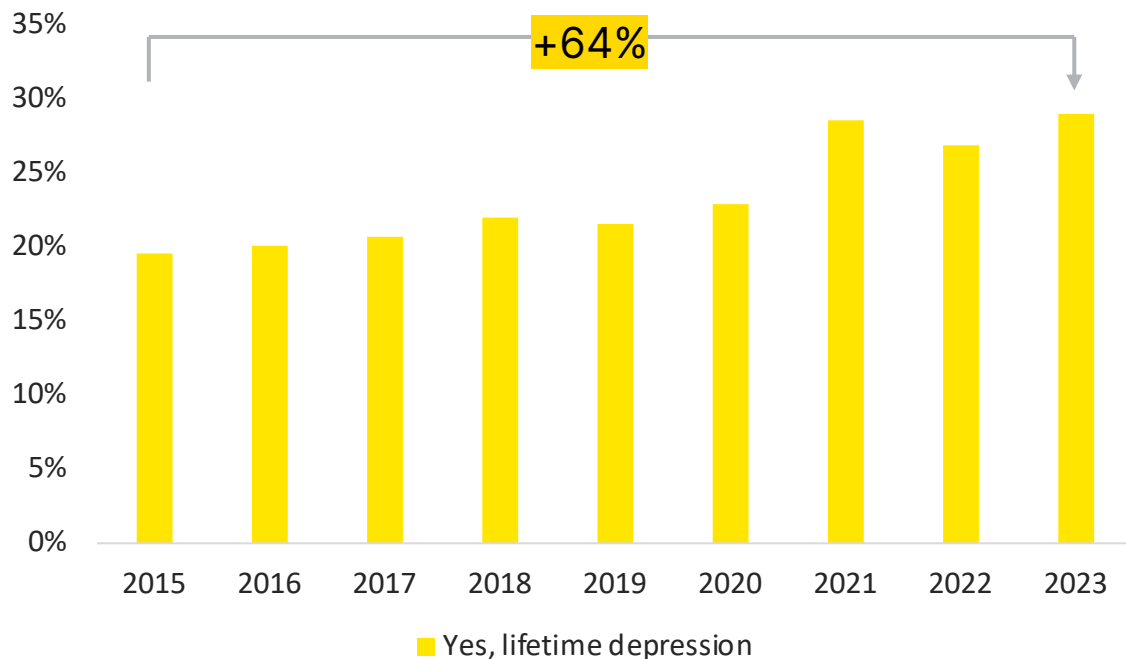


Distribution of overnight stays in France by British spectators who attended the Paris 2024 Olympic Games



Trend #7: The great resignation = stronger emphasis on well-being

Rising Trends: Lifetime and Current Depression rates in USA (% of panel surveyed)



The resignation rate in the USA **has more than doubled in two years**: 1,5% in April 2020 vs 3,2% in April 2022 ($\approx$ 4 millions job quits)

Trend #8: Chillseekers = more demand in cooler places and cooler seasons?

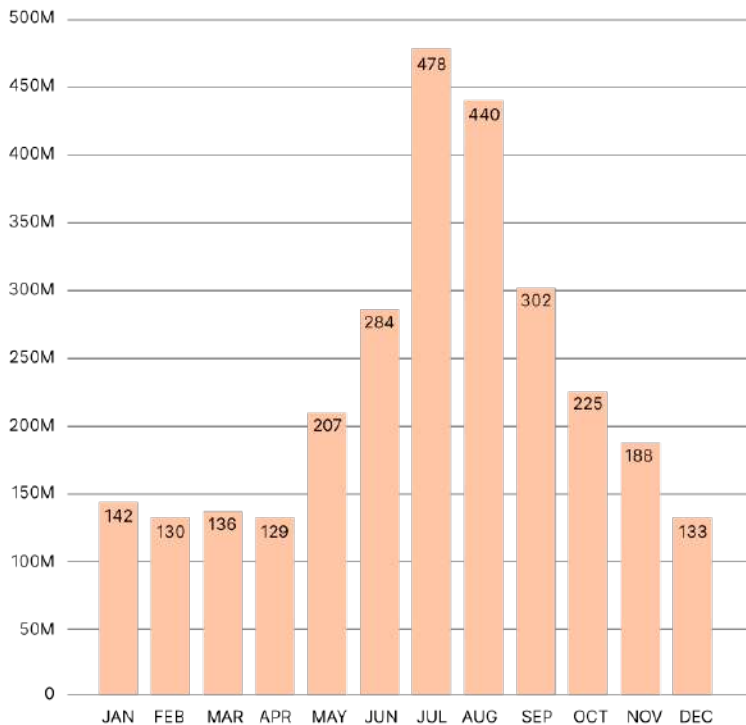


Projected evolution of the European regional tourism demand for all the global warming scenarios, compared to the present (2019) in percentage terms

Source : Regional impact of climate change on European tourism demand, JRC
Technical Report, European Commission

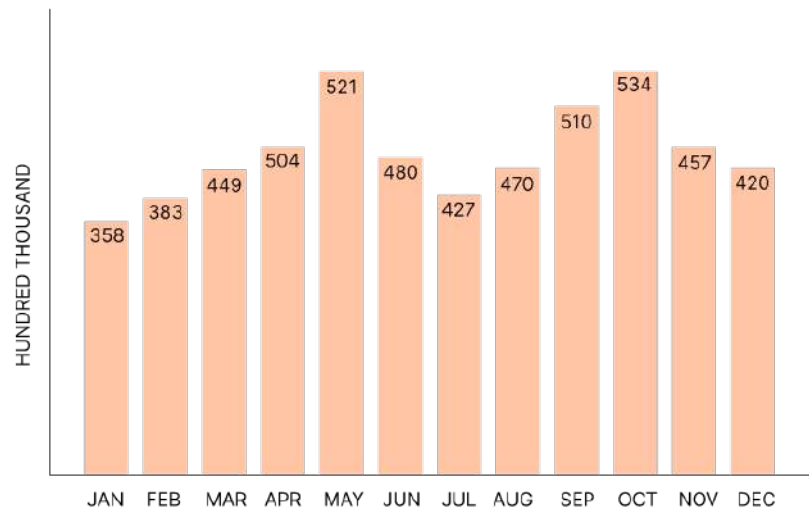
Trend #8: Chillseekers = more demand in cooler places and cooler seasons?

Summer in Europe: 50% of the turnover



Source: SchengenVisaInfo.com, 2022
Eurostat data in euro

Summer in Sevilla: 25% of the turnover

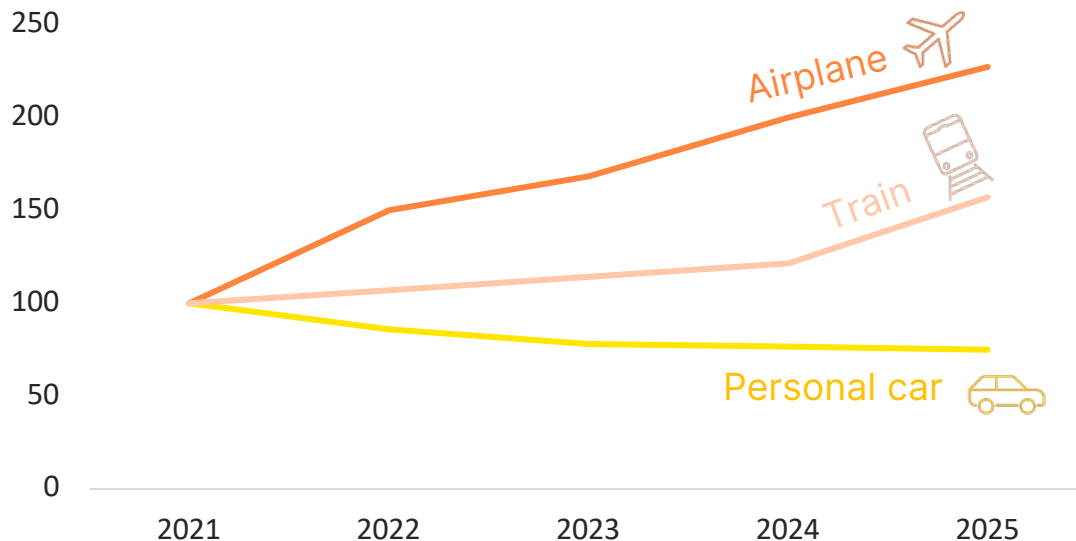


Source: Sevilla tourism office, 2018
Number of nights

Trends #9: The Greta Effect = bigger pressure on policy makers = fiscal changes = less demand for cruises and long-hauls?



Evolutions between 2021 & 2025 of transportation modes used to go to destination (Europe, base 100)

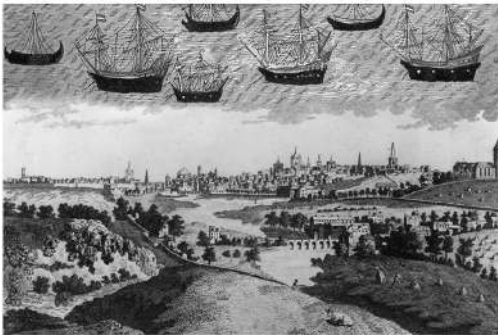


The ecological factor is the second-to-last factor considered by Europeans in their choice of transportation for vacations.

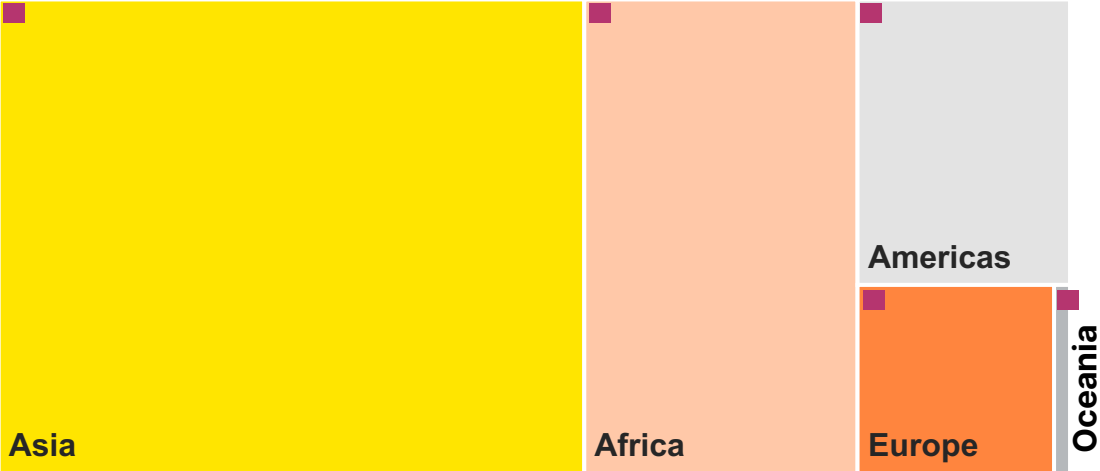
Trend #10: The Uninhabitable Earth = more space tourism?

Ireland's Upper Sea

In medieval Ireland, ships that sailed across the sky were both marvelous and mundane.



World Population in 2050



2024 World Population Prospects (UN)



Average estimated price for a ticket to space: \$250.000

The 1 minute recap



What is happening



What will happen



What will remain an idea

So what for tourism professionals?



Product development



Marketing strategy



Skills development



Policy changes

Danke
Thank You
Merci !
Grazie

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Sustainability

