



— THE FUTURE OF ISLAND TOURISM · 2026

The future of island tourism, **from volume to value.**

The post-recovery decade will not reward the destinations that attract the most visitors. It will reward the ones that capture the most value from each. A field guide to the eleven forces reshaping global travel in 2026 — and what small and island destinations should build now.

● ROATÁN TOURISM BUREAU · INTELLIGENCE SERIES

Tourism has entered a new era.

For two years the industry talked about recovery. That conversation is over. Global tourism has not just returned to its 2019 peak — it has passed it. The more useful question now is not whether travel comes back, but what kind of travel it comes back as.

The answer is already visible in the numbers. Arrivals have recovered; spending has overshoot. Travelers are taking fewer, longer, more deliberate trips, and paying more for experiences that restore, transform, teach and connect. They expect the places they visit to work seamlessly — and to protect what made them worth visiting in the first place.

This is good news for destinations that have spent years feeling like they were losing a numbers race they could never win. The post-recovery era is not about more arrivals. It is about **better arrivals, longer stays, deeper spend, stronger local value, and more resilient destination models**. That reframing changes who gets to win. A small island will never out-volume a mega-resort coast. It can absolutely out-value one.

This report is the Roatán Tourism Bureau's flagship reading of where travel is going. It is deliberately destination-neutral: a strategic map of the forces, a framework any board can use to assess itself, and a playbook of what to build. We publish it because we believe the destinations that read these shifts early — and act on them — will define the next decade of tourism. The application of this framework to a specific island follows in a separate brief.

— *Gonçalo Hall*

CEO · Roatán Tourism Bureau

The economics of tourism are changing faster than the volume.

Global tourism has recovered. Its economics have not stood still. The old model — volume, cheap packages, cruise dependency, and generic, interchangeable attractions — is becoming less resilient with every passing season. The new model rewards something harder to copy.

Travelers are concentrating their spending on meaning, wellness, nature, culture, and seamless infrastructure, and they are rewarding destinations that offer distinctiveness and longer-stay value. Receipts are now recovering faster than arrivals; wellness travelers out-spend ordinary tourists by roughly 40%; remote workers stay for months where tourists stayed for days; and discovery itself is migrating from search boxes to AI assistants that only recommend destinations they can clearly read.

The destinations that win the next decade will not be the ones chasing the most visitors. They will be the ones that increase value per visitor — by building around meaning, wellness, nature, culture, technology, longer stays, and regenerative models.

That is the argument of this report. Part I lays out the eleven forces reshaping demand. Part II offers a readiness framework any destination can score itself against. Part III is a practical playbook of what to build over the next twelve months, three years, and decade. None of it requires being big. All of it requires being deliberate.

THE CENTRAL ARGUMENT

Stop optimizing for arrivals. Start optimizing for value.

For decades, destination success was measured in one number: how many people came. It is the wrong number. Arrivals are a vanity metric that says nothing about what a visitor paid, how long they stayed, whether they came back, or whether the place survived them. The destinations pulling ahead have quietly switched the scoreboard.

What to optimize for instead.

Nine measures that, taken together, describe a healthier visitor economy — and a more defensible one. Few destinations track even half of them today.

01

Yield per visitor

Receipts divided by visitors — the single number that turns volume into value. Manage it, and the rest follows.

02

Length of stay

Every extra night compounds spend across lodging, food, and experiences. Nights, not arrivals, pay the bills.

03

Repeat visitation

A returning guest costs nothing to acquire and spends with confidence. Loyalty is cheaper than reach.

04

Local spend retention

What share of the visitor dollar actually stays on the island, versus leaking to outside operators and chains.

05

Environmental resilience

The natural asset is the product. Its condition is a balance-sheet item, not an externality.

06

Community benefit

Tourism that residents resent does not last. Local buy-in is a strategic asset, not a courtesy.

07

Brand distinctiveness

What can only be experienced here. Distinctiveness is the only durable defense against price competition.

08

Digital discoverability

Whether travelers — and the AI assistants they now ask — can find, understand, and choose you.

09

Year-round demand

Shoulder- and off-season demand turns fixed costs into profit and a seasonal economy into a stable one.

THE SHIFT IN ONE LINE

Move the destination's primary KPI from **how many came** to **how much value each visit created and left behind**. Everything in this report serves that one reframing.

PART ONE

The eleven forces reshaping travel in 2026.

Each force below is global and already underway. For every one, we set out what is changing, why it matters, how it shows up in practice, who is thriving on it, and — most importantly — what small and island destinations should do about it now. Figures are directional and drawn from the sources noted at the end.

\$1.6T

GLOBAL TOURISM RECEIPTS,
2024 — A RECORD, RECOVERING
FASTER THAN ARRIVALS · UN
TOURISM

TREND 01 · THE ECONOMICS

Value is overtaking volume

International tourism is fully back — roughly 1.4 billion arrivals in 2024 — but the more important number is receipts, which hit a record. Spend is recovering faster than headcount, and the destinations gaining ground are raising yield per visitor rather than simply filling more beds.

● IN PRACTICE

Boards are retiring arrival counts as their headline metric and managing to receipts, length of stay, and spend retained locally.

● WHO IS THRIVING

Bhutan's high-value, low-volume model; Iceland's per-visitor spend gains; islands shifting marketing budgets from headcount to yield.

WHAT SMALL & ISLAND DESTINATIONS SHOULD DO NOW

Choose one yield metric — receipts per visitor, or dollars retained on-island — and manage to it. Audit honestly which visitors actually pay the bills, and which just crowd the harbor.

\$894^B

GLOBAL WELLNESS TOURISM,
2024 — UP ~14% IN A YEAR ·
GLOBAL WELLNESS INSTITUTE

TREND 02 · DEMAND

Wellness and longevity go mainstream

Wellness tourism is now a near-trillion-dollar market growing far faster than travel overall, and wellness travelers spend about 41% more per trip than the average international tourist. Longevity — sleep, recovery, healthspan — is the fastest-moving new layer on top of it.

● IN PRACTICE

Resorts add recovery, diagnostics and longevity programming; destinations market "come back better," not just "come visit."

● WHO IS THRIVING

Costa Rica's blue-zone positioning; Thailand and the Gulf's medical-and-wellness build-out; longevity clinics attached to resorts.

WHAT SMALL & ISLAND DESTINATIONS SHOULD DO NOW

Layer wellness onto existing nature and food assets before building spas. A reef, a forest, or a quiet coast is already a wellness product — the work is naming and packaging it as one.

Depth

OVER DISTANCE — THE TRIP
JUDGED BY HOW IT CHANGES
YOU

TREND 03 · MEANING

Experiential and transformational travel

Travelers increasingly judge a trip by how it changed them, not how many sights they ticked off. Transformational travel — learning, challenge, cultural immersion, personal growth — is moving from niche to mainstream expectation, and it commands a premium because it cannot be commoditized.

● IN PRACTICE

Operators package skill, story and access — learn to free-dive, cook with a local family, train with a guide — over generic sightseeing.

● WHO IS THRIVING

New Zealand and Norway's nature-as-transformation branding; Indigenous-led cultural tourism; slow-travel itineraries.

WHAT SMALL & ISLAND DESTINATIONS SHOULD DO NOW

Build one signature experience that can only happen with you and that a visitor will tell a story about for years. Distinctiveness beats breadth, and a single unforgettable thing beats ten forgettable ones.

~75%

OF TRAVELERS SAY THEY WANT
TO TRAVEL MORE SUSTAINABLY ·
BOOKING.COM

TREND 04 · VALUES

From sustainable to regenerative

Around three in four travelers say they want to travel more sustainably, and the frontier is moving from "do less harm" to "leave it better." Regenerative tourism — visits that fund the restoration of the very asset they depend on — is becoming the next standard, and travelers increasingly audit the claims.

● IN PRACTICE

Destinations tie visitor activity to measurable restoration — reef, forest, wildlife — and report results credibly rather than greenwashing.

● WHO IS THRIVING

Palau's conservation pledge; Costa Rica's reforestation brand; reef-positive dive operators that fund what they show.

WHAT SMALL & ISLAND DESTINATIONS SHOULD DO NOW

Make conservation a product, not a tax. Fund restoration through experiences travelers actively want to buy, and publish the outcomes. Credibility is the moat; greenwashing is now a liability.

Fastest

-GROWING TRAVEL SEGMENTS ARE OUTDOOR, NATURE AND MARINE

TREND 05 · PRODUCT

Nature, adventure and the blue economy

Adventure and nature travel are among the fastest-growing segments, and marine tourism — diving, sailing, marine wildlife — commands premium prices and fierce loyalty. For most island destinations, the natural asset is the product; everything else is packaging around it.

● IN PRACTICE

Destinations protect and program their natural assets — marine parks, trails, dark skies — and build premium, low-impact access to them.

● WHO IS THRIVING

The Maldives and Galápagos on marine exclusivity; Norway and Patagonia on wilderness; dive destinations with healthy, protected reefs.

WHAT SMALL & ISLAND DESTINATIONS SHOULD DO NOW

Protect the asset first — it is the product. A degraded reef or an overrun trail is a permanent discount on everything you sell, and no marketing budget can buy it back.

~35M

CRUISE PASSENGERS IN 2024 — A RECORD, STILL CLIMBING · CLIA

TREND 06 · VOLUME

Cruise booms — but captures its own spend

Cruise demand is at record highs and rising. But cruise lines increasingly capture passenger spend onboard and at private islands engineered as self-contained destinations, leaving port towns with footfall and very little yield. Volume ashore is no longer the same as value ashore.

● IN PRACTICE

The smartest port destinations stop competing on call volume and convert a slice of passengers into higher-value experiences — or future stay-over visitors.

● WHO IS THRIVING

Ports that pair calls with signature shore products and "come back and stay" campaigns, and protect their brand from over-tourism.

WHAT SMALL & ISLAND DESTINATIONS SHOULD DO NOW

Treat cruise as marketing reach, not the main event. Measure spend ashore and conversion to overnight — not passengers landed — and design the shore day to start a longer relationship.

60+

COUNTRIES NOW OFFER
DIGITAL-NOMAD OR LONG-STAY
VISAS

TREND 07 · LENGTH OF STAY

Remote work rewrites length of stay

Tens of millions of people now work location-independently, and more than sixty countries have launched nomad or long-stay visas to court them. A remote worker who stays a month is worth a multiple of a one-week tourist — and, crucially, fills the shoulder season that breaks most seasonal economies.

● IN PRACTICE

Destinations add reliable connectivity, coworking, mid-term housing and community to convert visitors into months-long residents.

● WHO IS THRIVING

Portugal and Madeira; Bali; Mexico City; a wave of purpose-built island "nomad hubs."

WHAT SMALL & ISLAND DESTINATIONS SHOULD DO NOW

Compete on the unglamorous basics — internet, payments, housing, community. Long-stay is won on infrastructure, not brochures, and it is the single best lever against seasonality.

Women

INFLUENCE THE MAJORITY OF
TRAVEL DECISIONS WORLDWIDE

TREND 08 · THE TRAVELER

Who travels is changing

Women influence the majority of travel decisions, and solo female travel is among the fastest-rising search trends. At the same time, multigenerational trips, active "silver" travelers, and Gen Z's values-led spending are reshaping demand. The median traveler of 2026 looks nothing like the one destinations were built for.

● IN PRACTICE

Destinations design explicitly for safety, accessibility, family logistics and solo-friendliness — and say so, clearly, up front.

● WHO IS THRIVING

Operators with women-led and solo-female programming; destinations marketing safety and accessibility as features, not disclaimers.

WHAT SMALL & ISLAND DESTINATIONS SHOULD DO NOW

Design for women, families and older travelers first; those choices make the destination better for everyone. Treat safety perception as a growth lever, not a footnote.

Faster

LUXURY & PREMIUM TRAVEL IS GROWING AHEAD OF THE MARKET

TREND 09 · YIELD

Premiumization, top to bottom

Luxury and premium travel are growing faster than the market overall, and "premium" has broadened from five-star hotels to better food, better guides, and better access at every tier. Travelers will pay more for less friction and more meaning — and that willingness now reaches well down the price ladder.

● IN PRACTICE

Destinations introduce a credible premium tier — without going mass-luxury — and let it lift the perceived value of the whole brand.

● WHO IS THRIVING

The Maldives; the Caribbean's private-island resorts; emerging destinations that added a single genuine high-end anchor.

WHAT SMALL & ISLAND DESTINATIONS SHOULD DO NOW

Introduce one genuinely premium product to reset perceived value. You do not need to be expensive everywhere — you need to be unmistakably worth it somewhere.

AI

IS ENTERING TRIP PLANNING — AND DISCOVERY — FAST

TREND 10 · INFRASTRUCTURE

AI discovery and the cashless expectation

Travelers increasingly begin with an AI assistant rather than a search box, and expect to pay by phone everywhere they go. Destinations that are not machine-readable — clearly described, structured, and current online — are quietly going invisible at the moment of discovery, before a human ever weighs them.

● IN PRACTICE

Boards rewrite their content to be AI-legible and current; operators go cashless and mobile-first to remove friction from the visit.

● WHO IS THRIVING

Destinations with clean, structured digital content and seamless payments; places that fixed friction before their rivals noticed it.

WHAT SMALL & ISLAND DESTINATIONS SHOULD DO NOW

Audit two things this year: whether an AI assistant can describe and recommend you accurately, and whether a visitor can pay everywhere by phone. Both are now table stakes, not advantages.

Fewer,

RICHER, MORE INTENTIONAL
TRIPS PER TRAVELER

TREND 11 · BEHAVIOR

Intentional and milestone travel

Constrained by time and cost, travelers are taking fewer but more deliberate trips, and weighting them toward milestones — birthdays, anniversaries, reunions, once-in-a-lifetime experiences. Each trip now carries more expectation and more budget, and the destination that owns the occasion captures both.

● IN PRACTICE

Destinations court celebration and milestone travel with packages worth crossing an ocean for, and capture the higher spend that comes with them.

● WHO IS THRIVING

Places built around once-in-a-lifetime moments — the Northern Lights, the Galápagos, milestone safaris, anniversary escapes.

WHAT SMALL & ISLAND DESTINATIONS SHOULD DO NOW

Give travelers a reason to choose you for the trip that matters, not the trip they forget. Own a moment, not a category — occasions defend price in a way features never will.

— THE SYNTHESIS

What all eleven forces agree on.

Strip away the categories and the eleven forces are telling one story. The modern traveler is trading accumulation for meaning.

They are taking fewer, richer, more intentional trips. They are paying for experiences that restore, transform, teach, connect, and align with their values. They expect the destination to work seamlessly — to book, to navigate, to pay — and they expect it to protect what makes it special. Volume, price, cruise dependency, and generic attractions all point the same direction: toward commoditization, the one race a small destination cannot win.

Meaning, wellness, nature, culture, distinctiveness, and seamless infrastructure point the other way — toward value, loyalty, and resilience. That is the race a small or island destination can win, because it is the one place size is a disadvantage and character is the whole game.

The through-line

Every trend in this report rewards the same thing: **knowing what you are worth, protecting what makes you rare, and designing the visitor economy around value rather than headcount.** Destinations that internalize this will look, in ten years, like they planned for a future everyone else was merely surprised by.

— → STRATEGIC IMPLICATIONS

What island and small destinations should prioritize.

The forces are global; the response is local. Ten priorities translate the shift from volume to value into things a board can actually own.

Switch the scoreboard

Move from arrival-counting to value-per-visitor economics. You cannot manage yield you do not measure.

Build signature experiences

Replace generic, interchangeable tours with a few things only you can offer. Distinctiveness is the defense against price.

Protect the natural asset

Treat the reef, forest or coast as the core product and a balance-sheet item — because that is exactly what it is.

Add wellness and recovery

Layer wellness onto what you already have. It is the highest-yield demand segment and it loves nature destinations.

Convert short stays to long

Turn day-trippers and cruise calls into overnights, and tourists into long-stay guests. Nights are where value lives.

Remove every friction

Make booking, payment, transport and connectivity seamless. Friction is silent leakage of spend and goodwill.

Become machine-readable

Make the destination AI-discoverable and content-legible, or disappear at the moment travelers now start their search.

Coordinate local operators

The visitor experiences your weakest link. Set standards, train, and align the people who deliver the product.

Design for the new traveler

Build for women, families, older travelers, remote workers and premium guests — explicitly, and say so.

Engineer year-round demand

Use long-stay, wellness and milestone travel to fill the shoulder season and turn fixed costs into profit.

PART TWO

The destination readiness framework.

Strategy is only useful if a destination can locate itself on it. Twelve dimensions determine whether a place is ready to compete on value. Score each honestly — strong, mixed, or weak — and the priorities for the next year fall out of the lowest scores. For each, we give why it matters, what to ask, the signal of weakness, and the priority action.

1 · Natural asset strength

Why it matters — the asset is the product; its condition caps everything you can charge.

Ask — Is the core asset improving or degrading, and do you actually measure it?

Weak signal — Declining reef, forest or water quality; visible crowding; no monitoring.

Priority — Protect and measure it before you market it.

2 · Experience quality

Why it matters — distinctiveness drives yield, loyalty and word of mouth.

Ask — Do you have a signature experience only you can offer?

Weak signal — Generic, interchangeable tours that any destination could run.

Priority — Build and package one signature; cut the commodity filler.

3 · Stay-over potential

Why it matters — overnight visitors out-yield day-trippers many times over.

Ask — What share of visitors sleep here, and for how many nights?

Weak signal — High day-tripper or cruise share; very short average stays.

Priority — Engineer reasons to stay the extra night, then the extra week.

4 · Wellness potential

Why it matters — wellness travelers spend ~40% more and love nature destinations.

Ask — Can your nature, food and pace be framed as wellness today?

Weak signal — No wellness product, and no wellness narrative.

Priority — Name and package the wellness you already have before building spas.

5 · Regenerative credibility

Why it matters — values-led travelers reward it — and increasingly audit it.

Ask — Does visitor spend measurably restore your assets?

Weak signal — Claims without evidence; exposure to greenwashing backlash.

Priority — Tie a real restoration outcome to a sellable experience, and report it.

6 · Digital & payment infrastructure

Why it matters — friction quietly loses bookings and on-island spend.

Ask — Can a visitor book, navigate and pay by phone, end to end?

Weak signal — Cash-only operators; patchy connectivity; clunky booking.

Priority — Close the payment and connectivity gaps first; they touch everything.

7 · Air access & mobility

Why it matters — lift is the hard ceiling on every demand ambition.

Ask — Who can fly to you, how often, and from which markets?

Weak signal — Thin or seasonal routes; painful transfers; single-market reliance.

Priority — Protect and grow strategic routes; smooth the last mile on the ground.

8 · Safety perception

Why it matters — perception gates whole segments: solo, family, premium.

Ask — Do your highest-value segments feel safe choosing you?

Weak signal — Unmanaged perception; an incident-driven public narrative.

Priority — Manage and communicate safety as a product feature, proactively.

9 · Local operator coordination

Why it matters — the visitor experiences the weakest operator, not the average.

Ask — Do operators meet a shared, visible standard of quality?

Weak signal — Fragmented quality; no standards; no coordination body.

Priority — Set standards, train to them, and coordinate the front line.

10 · AI & search discoverability

Why it matters — discovery now runs through machines before humans.

Ask — Can an AI assistant describe and recommend you accurately?

Weak signal — Thin, stale, unstructured content; wrong or missing basics online.

Priority — Make the destination machine-readable, current and structured.

11 · Premium product readiness

Why it matters — one credible premium anchor resets the whole brand's value.

Ask — Is there a genuinely high-end option, even one?

Weak signal — Everything mid-market; nothing a discerning traveler aspires to.

Priority — Add one credible premium product and let it lift perception.

12 · Long-stay readiness

Why it matters — long-stay guests fill shoulder seasons at high value.

Ask — Can someone live and work with you comfortably for a month?

Weak signal — No mid-term housing, weak connectivity, no community.

Priority — Build the long-stay basics: housing, internet, coworking, belonging.

PART THREE

The 2026 playbook: what to build, and when.

Strategy without sequence is a wish-list. The moves below are grouped by horizon — what a destination can do inside a year, what takes one to three, and the big bets that define the decade. Start at the left; the quick wins fund the credibility to attempt the rest.

Quick wins

UNDER 12 MONTHS

- Package one signature experience and price it for value, not volume.
- Refresh destination content for AI and search — accurate, structured, current.
- Lead with women-led travel and safety storytelling.
- Build local food and culture trails from assets you already have.
- Run shoulder-season campaigns aimed at long-stay and wellness demand.
- Audit payment friction and push operators cashless and mobile-first.
- Launch a cruise- and day-trip-to-overnight conversion campaign.

Builds

1–3 YEARS

- Adopt regenerative operator standards tied to real restoration.
- Develop wellness and recovery products on your natural assets.
- Stand up long-stay and remote-work programs with housing and coworking.
- Roll out cashless, mobile-first destination infrastructure end to end.
- Create a local experience marketplace that keeps spend on-island.
- Train and coordinate operators to a shared quality standard.

Big bets

3+ YEARS

- Anchor a premium lodging and wellness flagship.
- Build conservation-financing models that fund restoration at scale.
- Establish a destination innovation or intelligence hub.
- Develop a year-round MICE, retreat and events ecosystem.
- Set a long-stay and residential-tourism strategy for the decade.

CONCLUSION

Know what you are worth.

The future of tourism will not reward destinations that simply attract more bodies. The volume game is a race to the bottom, and the bottom is crowded. It will reward destinations that **know what they are worth, protect what makes them rare, and design the visitor economy around value, meaning, and resilience.**

None of that requires being large. It requires being deliberate — choosing a yield metric and managing to it, building one unforgettable thing, protecting the asset that is the product, and removing the friction between a traveler and their money. The forces in this report are doing the hard part already; they are pushing demand toward exactly the qualities a small or island destination can own.

The destinations that win the next decade will be the ones that stop counting arrivals and start counting what each visit is worth — and leaves behind.

NEXT REPORT

This framework is built to be applied.

The forces, the readiness framework, and the playbook in this report describe what any island or small destination faces in 2026. The companion brief in this series puts the framework to work on a single destination — assessing one island against all twelve readiness dimensions and turning the global playbook into a specific, sequenced strategy. The framework is general; the advantage is in the application.

The Future of Island Tourism 2026 — From Volume to Value. The flagship report of the Roatán Tourism Bureau's Intelligence Series: a destination-neutral reading of the forces reshaping global travel, and what small and island destinations should build now.

SOURCES: UN TOURISM · WTTC · CLIA · IATA
GLOBAL WELLNESS INSTITUTE · BOOKING.COM
SKIFT · AMEX TRAVEL · VIRTUOSO

FIGURES ARE DIRECTIONAL