Travel Insights 2025 and Trends 2026
Focus on the Americas

Olivier Ponti
Director Intelligence & Marketing
10th December, 2025

amadeus

In collaboration with

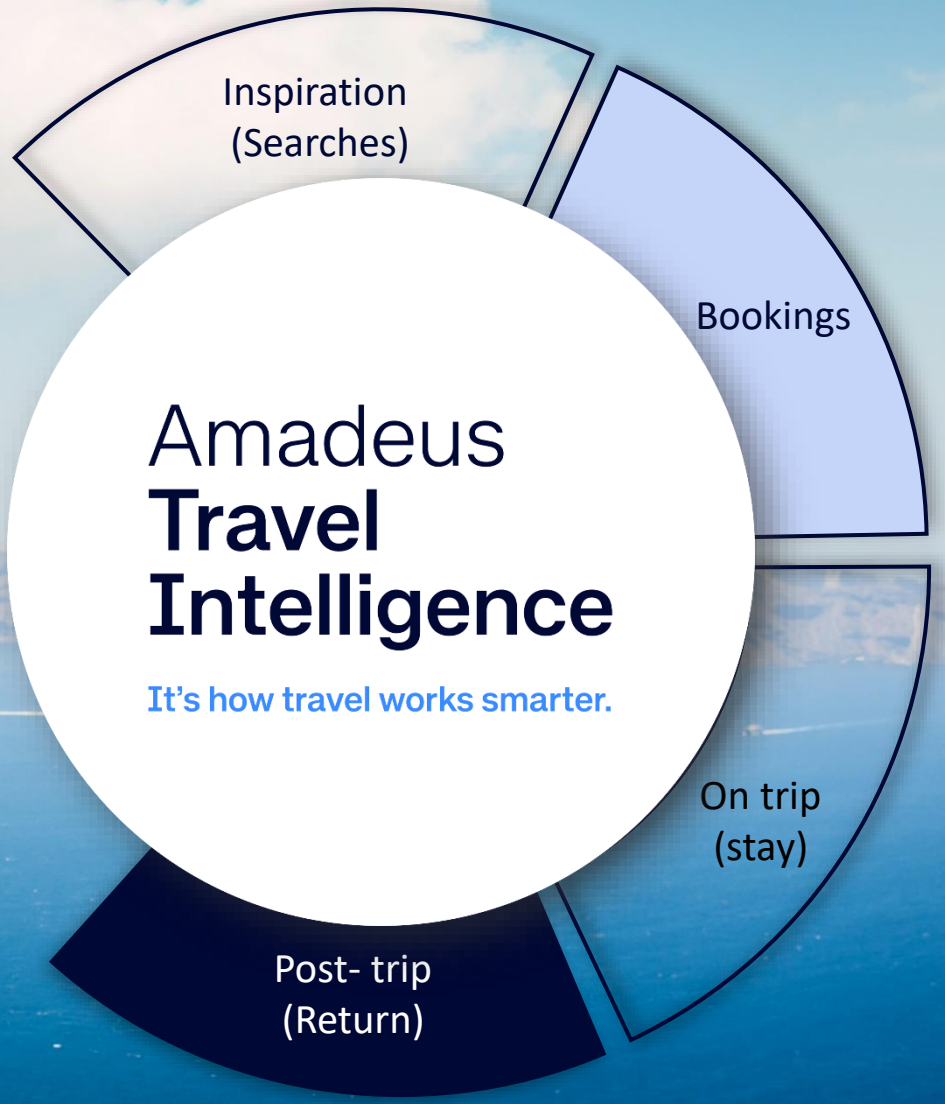
UN Tourism



Amadeus. It's how travel works better.

Understand the entire Traveler Journey

Data-driven insights that fuel the travel ecosystem



Amadeus. It's how travel works better.

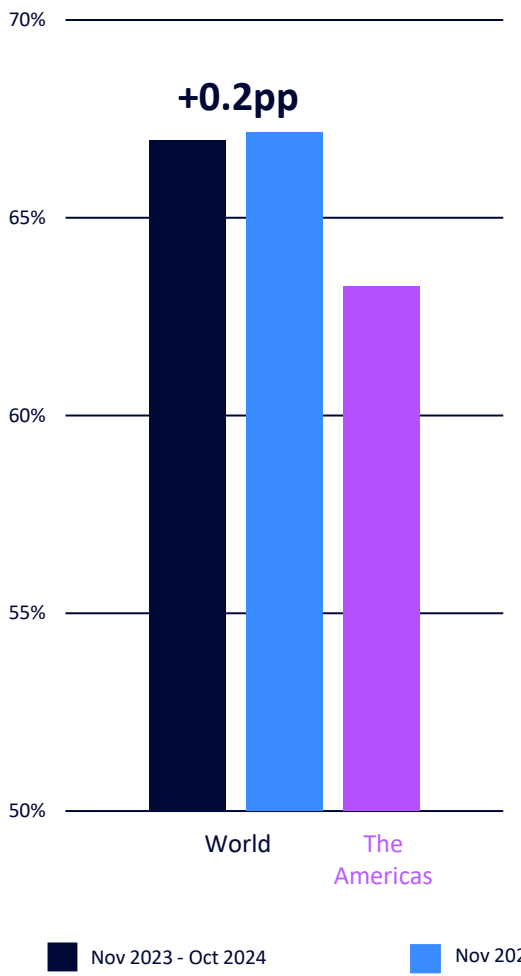
CONFIDENTIAL

Global Trends

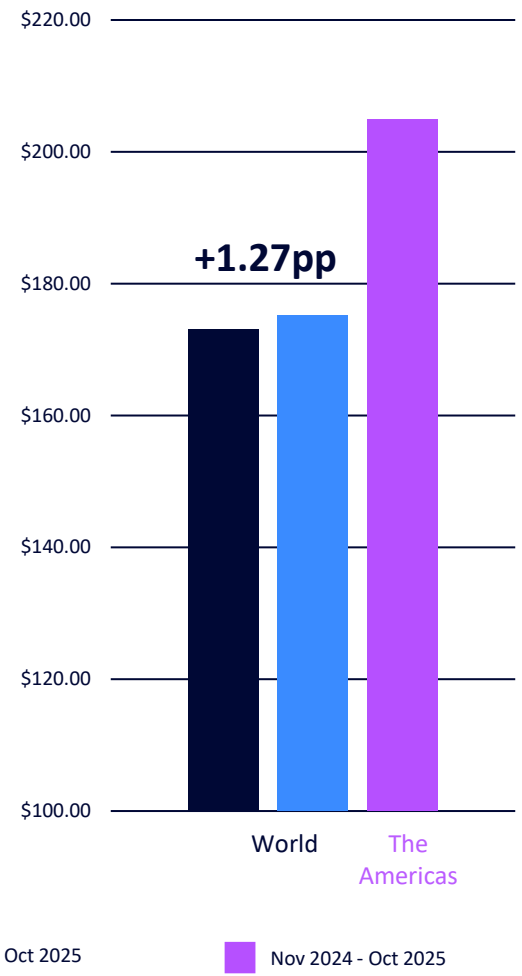


Hospitality market indicators

Occupancy evolution
(Average of 12 months period in %)

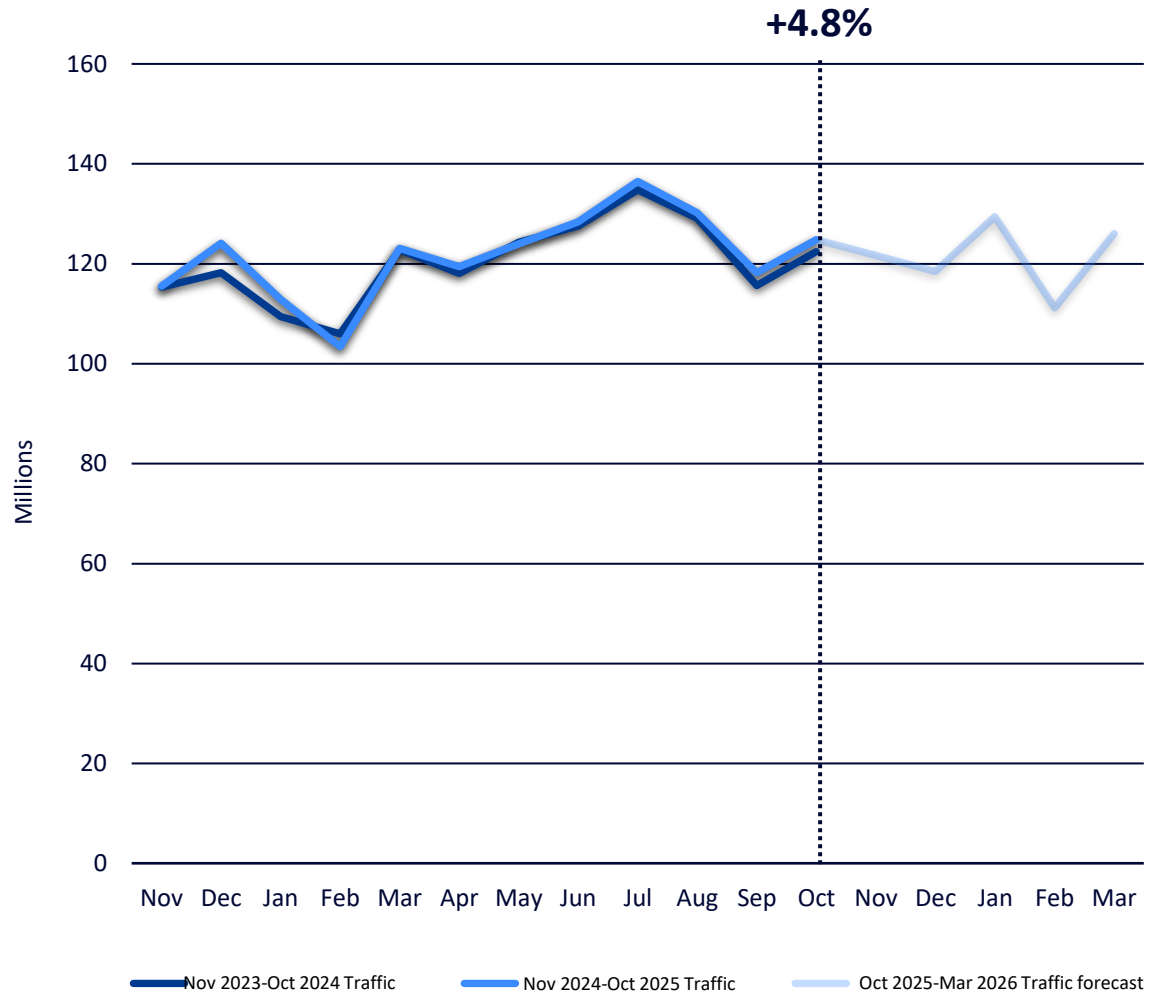


Average Daily Rate ("ADR") evolution in USD
(Average of 12 months period)



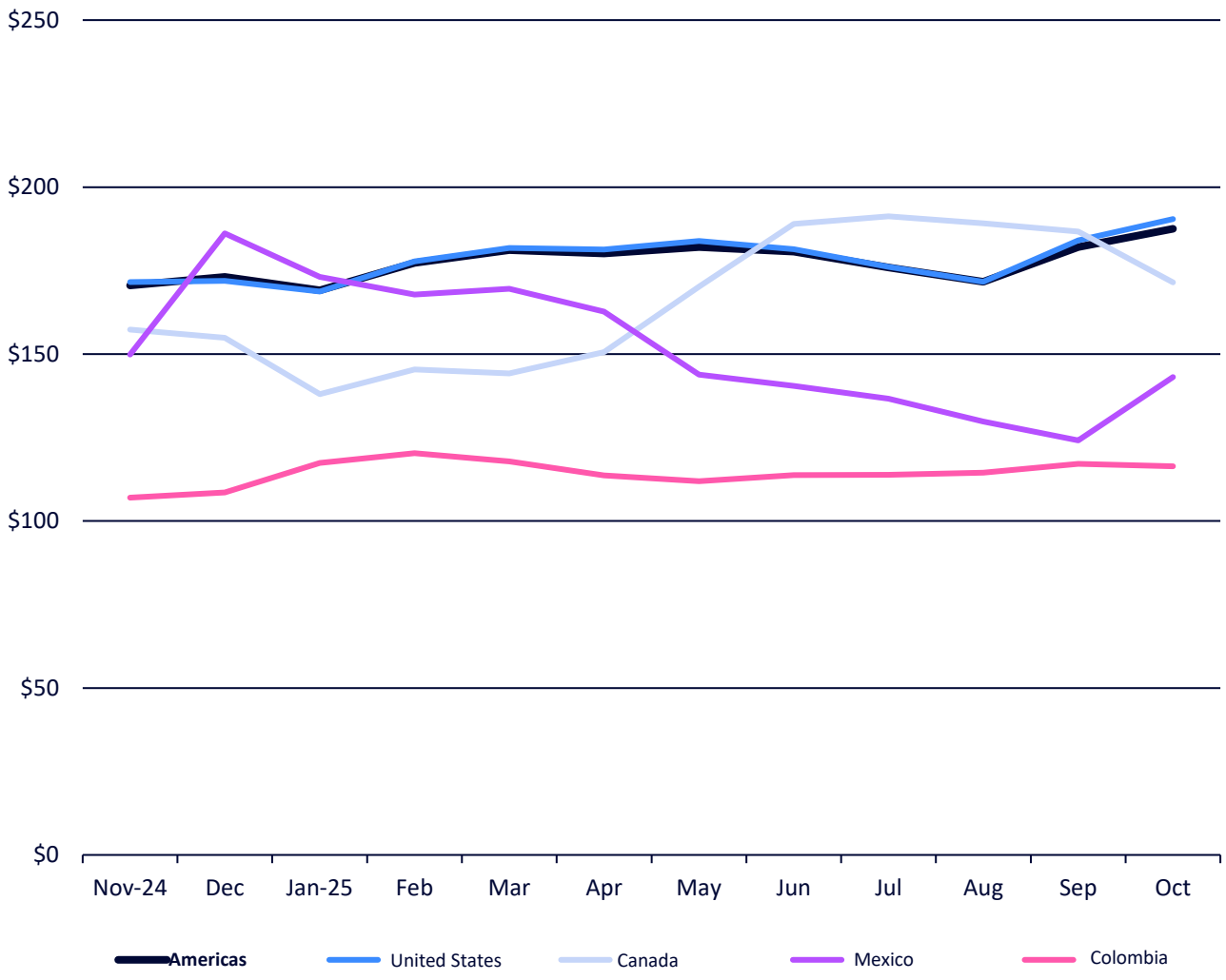
Rising Air Traffic in the Americas

Worldwide to the Americas: International and domestic passenger traffic



© Amadeus IT Group and its affiliates and subsidiaries

Average Daily Rate (ADR) in USD





Fuente: Destination Gateway™ a domingo, 16 de noviembre de 2025

The Americas



© Amadeus IT Group and its affiliates and subsidiaries

Where do visitors come from?

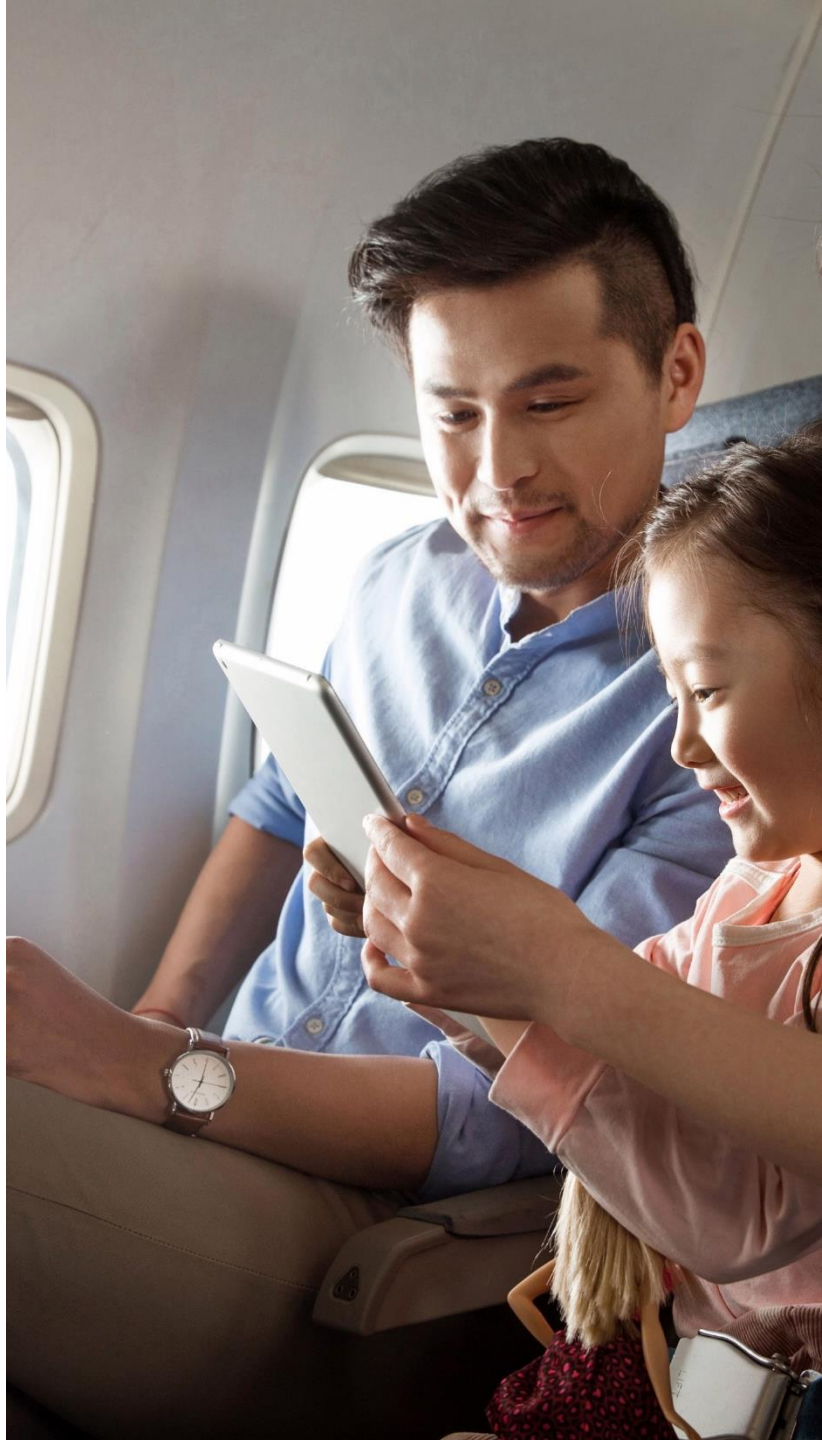
Reality vs. aspiration

Top origin markets **searching** for the Americas

Origin market	Nov.23-Oct.24 ranking	Nov.24-Oct.25 ranking
United States	1	1
Brazil	2	2
Canada	3	3
Mexico	4	4
United Kingdom	5	5
Colombia	6	6
Argentina	7	7
China	12	8
India	8	9
Spain	11	10

Top origin markets **travelling** to the Americas

Origin market	Nov.23-Oct.24 ranking	Nov.24-Oct.25 ranking
United States	1	1
Canada	2	2
Argentina	4	3
Mexico	3	4
Colombia	5	5
Brazil	6	6
United Kingdom	7	7
Chile	8	8
Spain	10	9
India	9	10



Fuente: Destination Gateway™ a domingo, 16 de noviebre de 2025

Are travelers from these markets to the Americas already on your radar?

Top origin markets searching for the Americas with the highest growth (among the TOP 30)

Origin market	Nov.24-Oct.25 vs Nov.23-Oct.24 ranking	YoY Growth
Canada	1	41%
China	2	41%
Rep. of Korea	3	40%
Japan	4	32%
United States	5	28%
Dominican Republic	6	28%
Mexico	7	28%
Puerto Rico	8	28%
Portugal	9	24%
Argentina	10	23%

Top origin markets travelling to the Americas with the highest growth (among the TOP 30)

Origin market	Nov.24-Oct.25 vs Nov.23-Oct.24 ranking	YoY Growth
Argentina	1	13%
Puerto Rico	2	8%
China	3	6%
Israel	4	5%
Japan	5	5%
Rep. of Korea	6	1%
Australia	7	1%
United States	8	-1%
Italy	9	-2%
Taiwan (pr. of China)	10	-2%



Fuente: Destination Gateway™ a domingo, 16 de noviebre de 2025

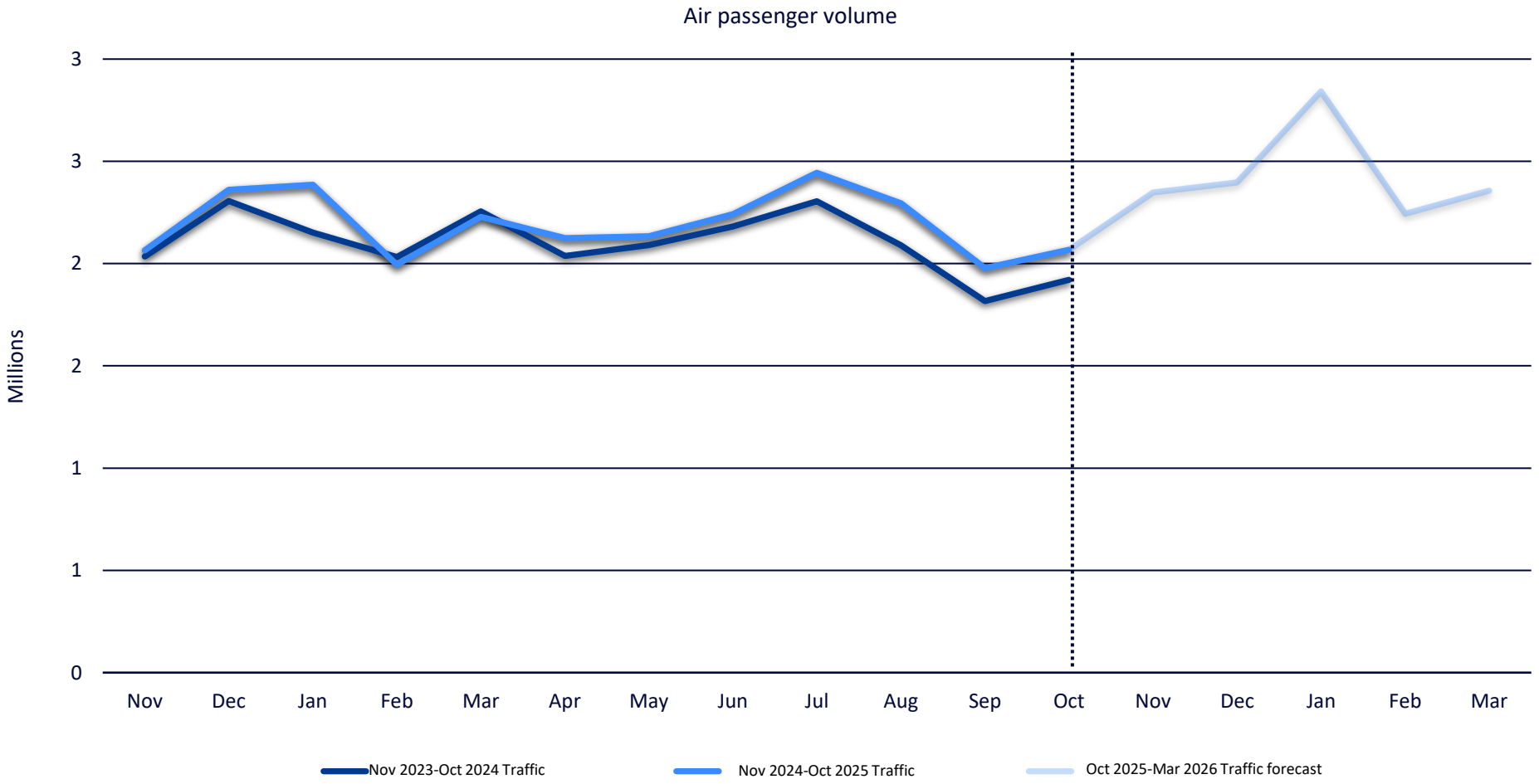
The Americas – North America



© Amadeus IT Group and its affiliates and subsidiaries

Worldwide to North America

International and domestic passenger traffic



0.2%
year-on-year growth
in passenger traffic

Source: Destination Gateway™ as of Sunday, 16 November 2025

amadeus

Where do visitors come from? Reality vs. aspirations

Top origin markets **searching** for North America

Origin market	Nov.23-Oct.24 ranking	Nov.24-Oct.25 ranking
United States	1	1
Canada	2	2
Mexico	3	3
United Kingdom	4	4
China	6	5
India	5	6
Brazil	7	7
Germany	8	8
Japan	11	9
France	9	10

Top origin markets **travelling** to North America

Origin market	Nov.23-Oct.24 ranking	Nov.24-Oct.25 ranking
United States	1	1
Canada	2	2
Mexico	3	3
United Kingdom	5	4
India	4	5
Italy	6	6
Rep. Of Korea	8	7
Japan	9	8
Germany	7	9
France	10	10



Source: Destination Gateway™ as of Sunday, 16 November 2025

Are travellers from these markets to North America already on your radar?

Top origin markets **searching** for North America with the highest growth (among the TOP 30)

Origin market	Nov.24-Oct.25 vs Nov.23-Oct.24 ranking	YoY Growth
Canada	1	46%
Rep. Of Korea	2	41%
China	3	38%
Japan	4	33%
Mexico	5	28%
Taiwan (pr. of China)	6	28%
United States	7	27%
Dominican Rep.	8	27%
Puerto Rico	9	26%
Costa Rica	10	20%

Top origin markets **travelling** to North America with the highest growth (among the TOP 30)

Origin market	Nov.24-Oct.25 vs Nov.23-Oct.24 ranking	YoY Growth
Puerto Rico	1	7%
Israel	2	6%
Japan	3	6%
China	4	2%
Rep. Of Korea	5	1%
Australia	6	1%
Ireland	7	-1%
Canada	8	-1%
United States	9	-1%
Taiwan (pr. of China)	10	-2%

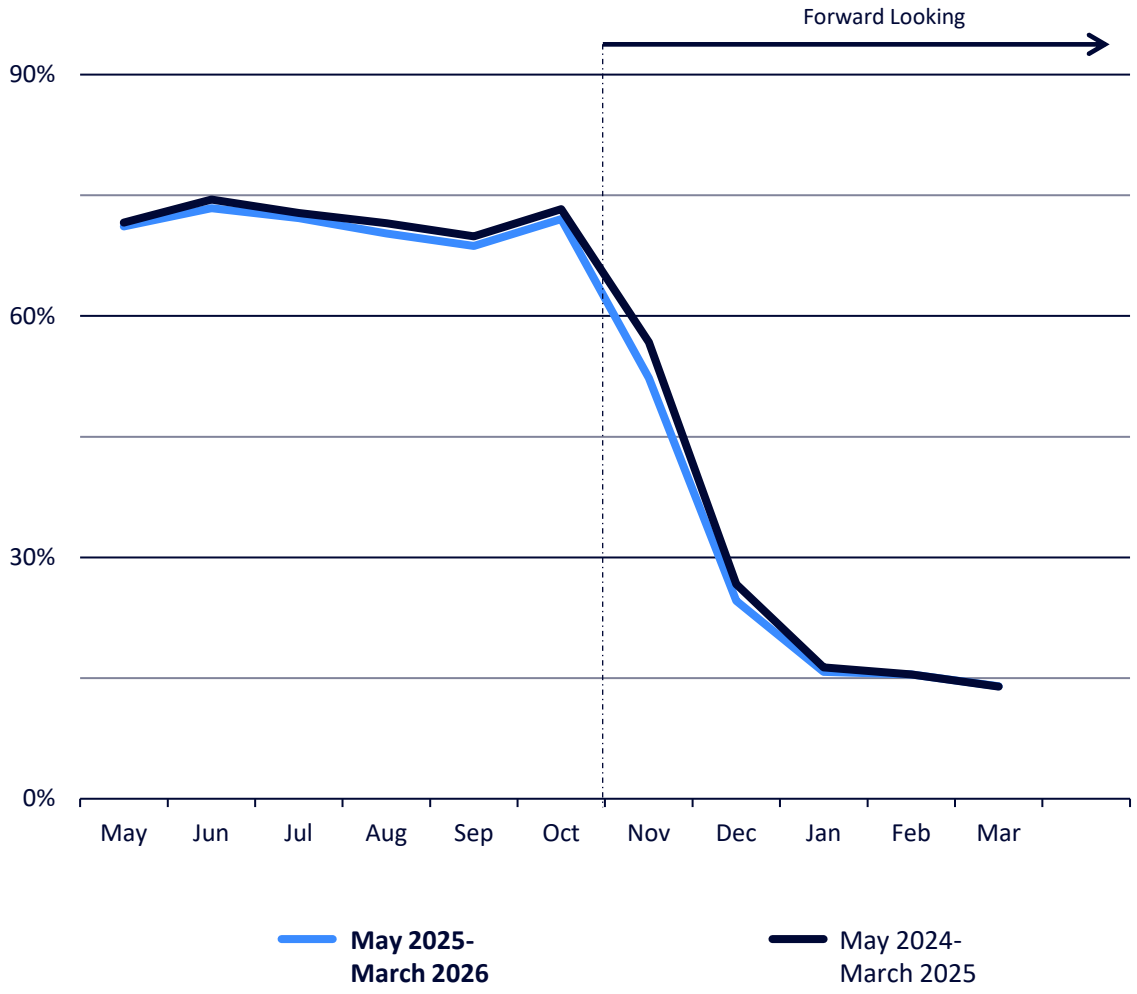


amadeus

Source: Destination Gateway™ as of Sunday, 16 November 2025

Hotel Occupancy in North America

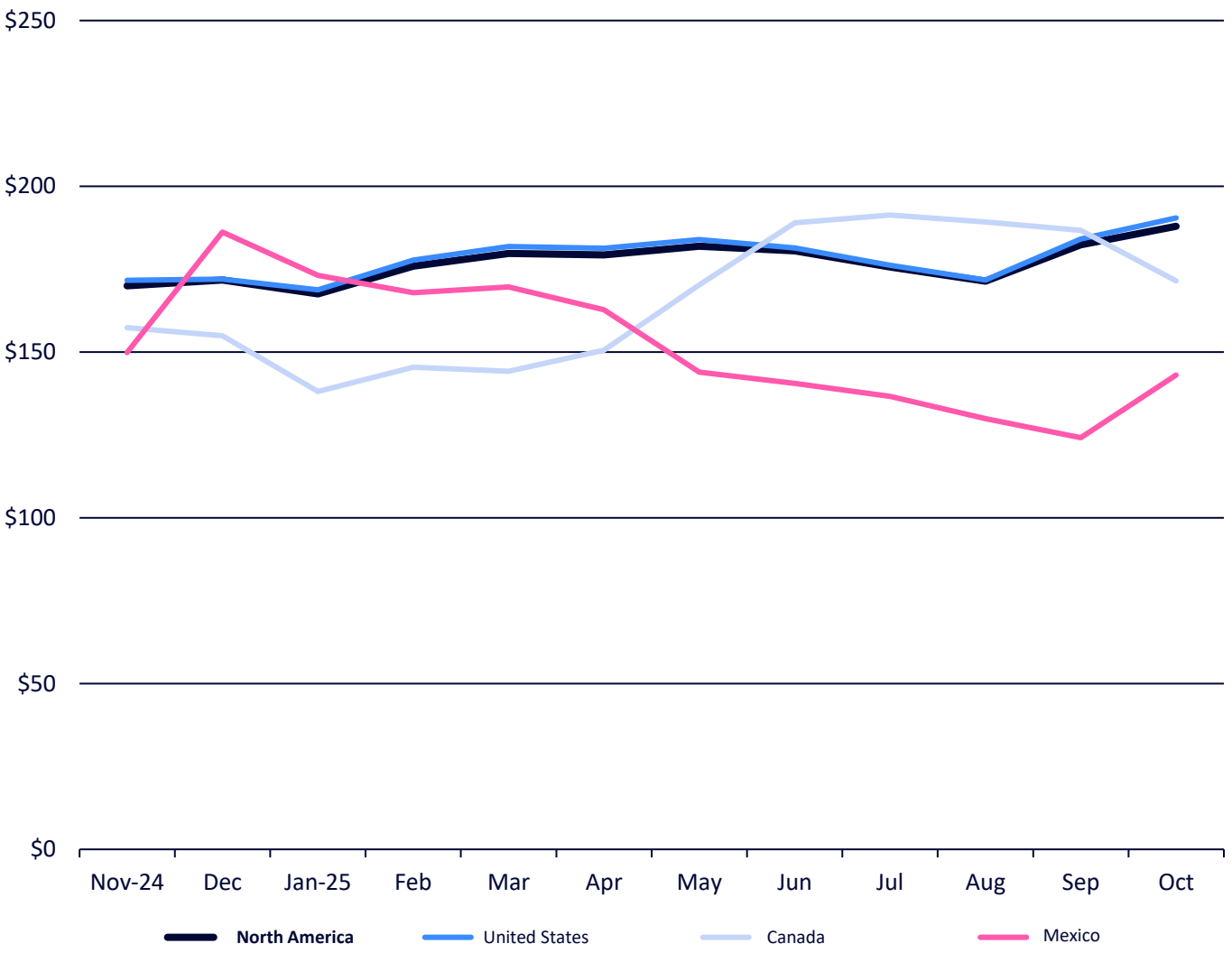
On-the-books by month compared to same month last year





Source: Destination Gateway™ as of Sunday, 16 November 2025

Average Daily Rate (ADR) in USD





Source: Destination Gateway™ as of Sunday, 16 November 2025

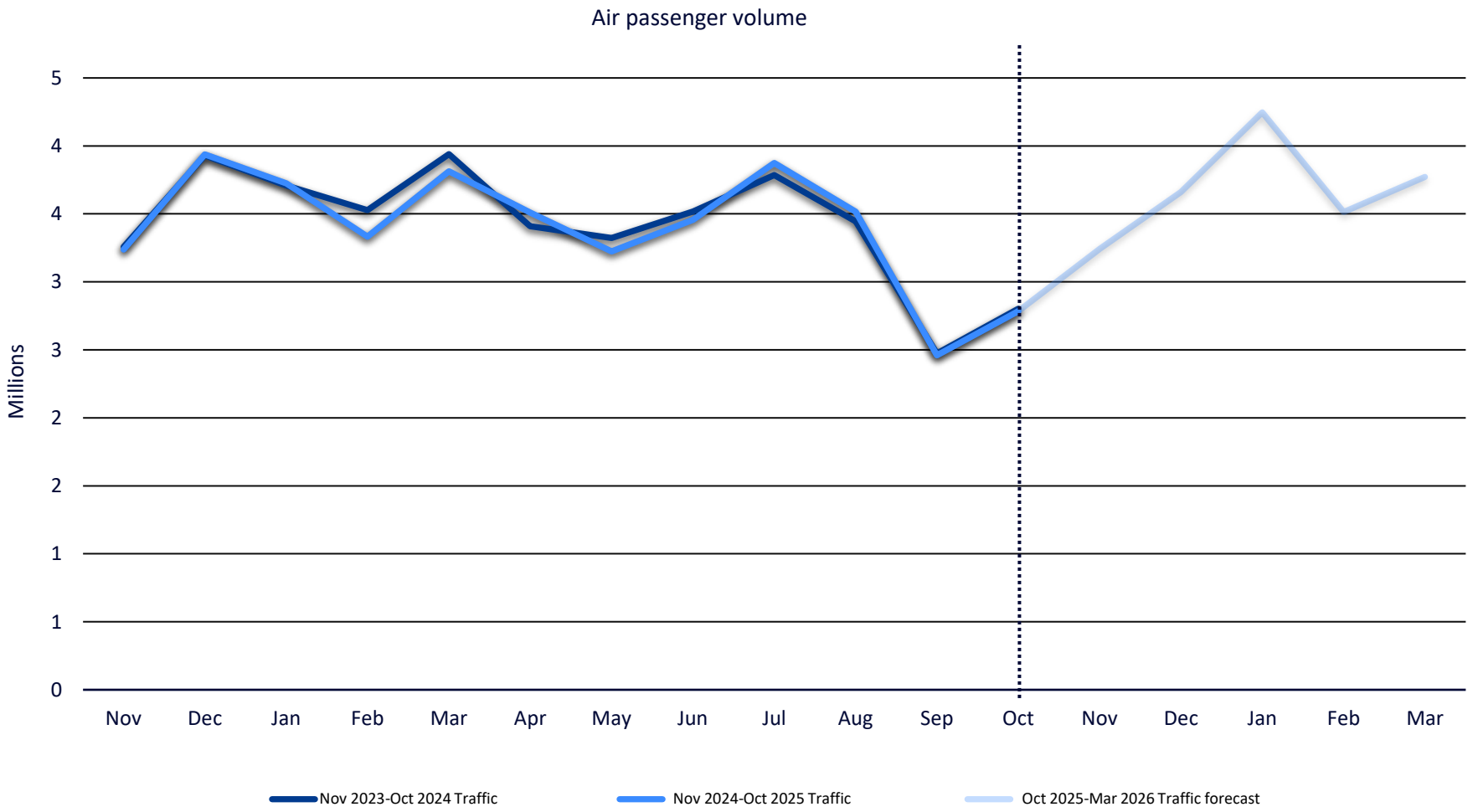
The Americas - Caribbean



© Amadeus IT Group and its affiliates and subsidiaries

Worldwide to the Caribbean

International and domestic passenger traffic



-0.6%

year-on-year growth in passenger traffic

amadeus

Source: Destination Gateway™ as of Sunday, 16 November 2025

Where do visitors come from? Reality vs. aspirations

Top origin markets **searching** for the Caribbean

Origin market	Nov.23-Oct.24 ranking	Nov.24-Oct.25 ranking
United States	1	1
Canada	2	2
France	3	3
United Kingdom	4	4
Argentina	5	5
Brazil	7	6
Colombia	8	7
Germany	6	8
Spain	9	9
Italy	10	10

Top origin markets **travelling** to the Caribbean

Origin market	Nov.23-Oct.24 ranking	Nov.24-Oct.25 ranking
United States	1	1
France	2	2
Canada	3	3
United Kingdom	4	4
Argentina	5	5
Spain	6	6
Italy	7	7
Puerto Rico	8	8
Colombia	9	9
Germany	10	10

Source: Destination Gateway™ as of Sunday, 16 November 2025



Are travellers from these markets to the Caribbean already on your radar?

Top origin markets **searching** for the Caribbean with the highest growth (among the TOP 30)

Origin market	Nov.24-Oct.25 vs Nov.23-Oct.24 ranking	YoY Growth
China	1	79%
Puerto Rico	2	45%
Mexico	3	43%
Costa Rica	4	37%
Guatemala	5	35%
Dominican Rep.	6	31%
Netherlands	7	31%
Peru	8	31%
United States	9	31%
Panama	10	29%

Top origin markets **travelling** to the Caribbean with the highest growth (among the TOP 30)

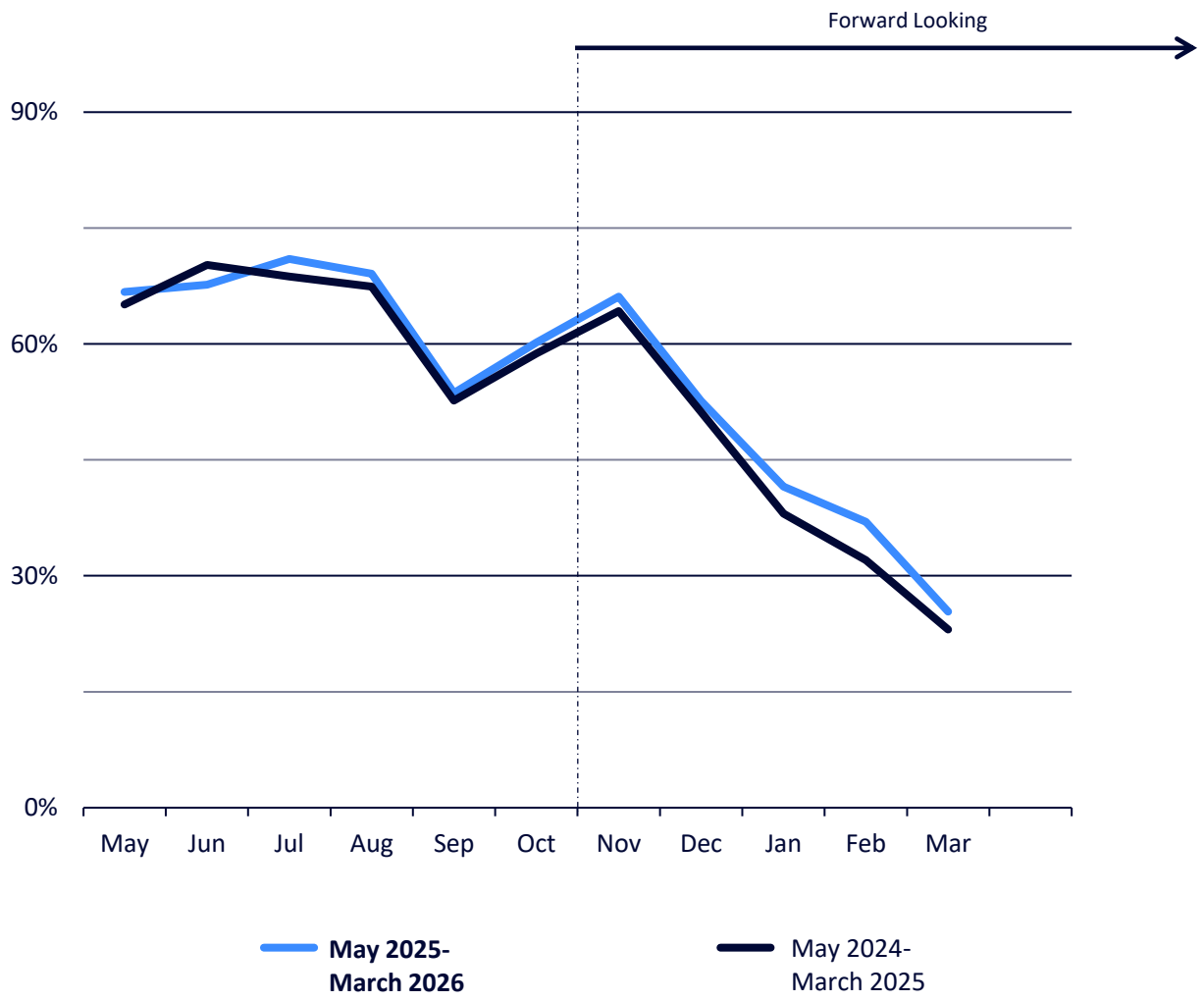
Origin market	Nov.24-Oct.25 vs Nov.23-Oct.24 ranking	YoY Growth
Argentina	1	21%
Suriname	2	17%
Mexico	3	11%
Puerto Rico	4	8%
Peru	5	6%
Guyana	6	4%
United States	7	2%
US Virgin Islands	8	1%
Trinidad & Tobago	9	0%
Antigua & Barbuda	10	-1%

Source: Destination Gateway™ as of Sunday, 16 November 2025



Hotel Occupancy in the Caribbean

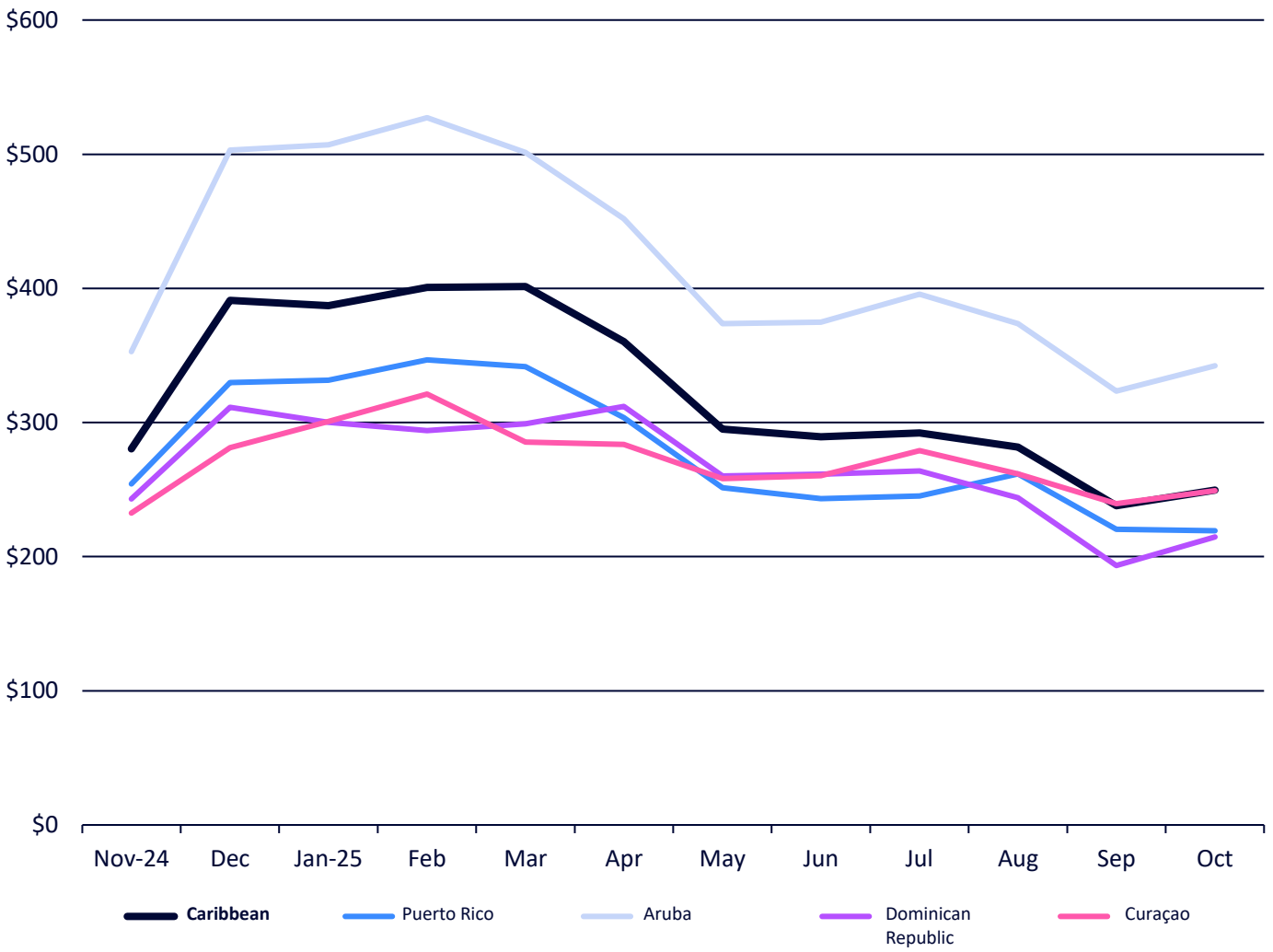
On-the-books by month compared to same month last year

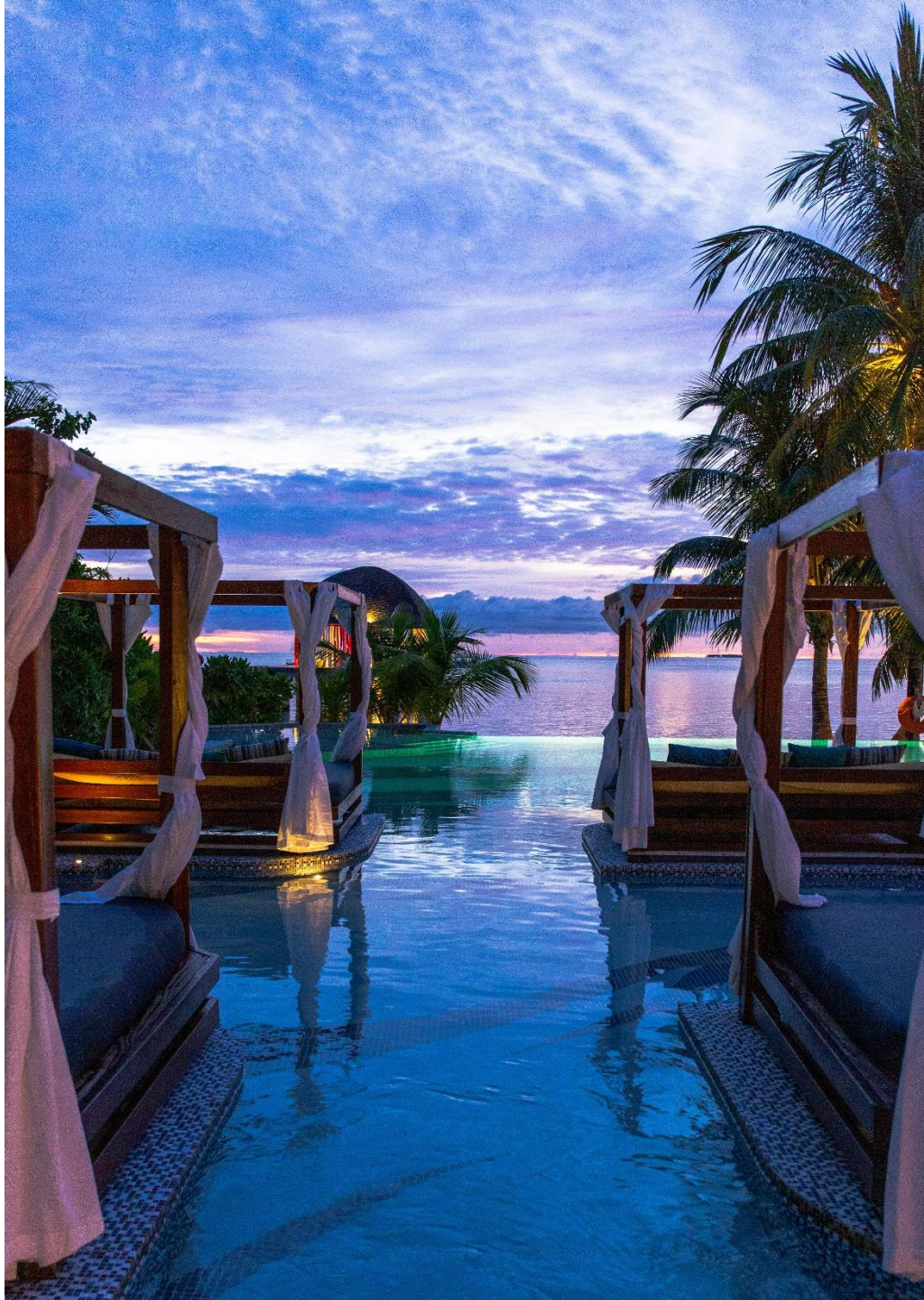




Source: Destination Gateway™ as of Sunday, 16 November 2025

Average Daily Rate (ADR) in USD





Source: Destination Gateway™ as of Sunday, 16 November 2025

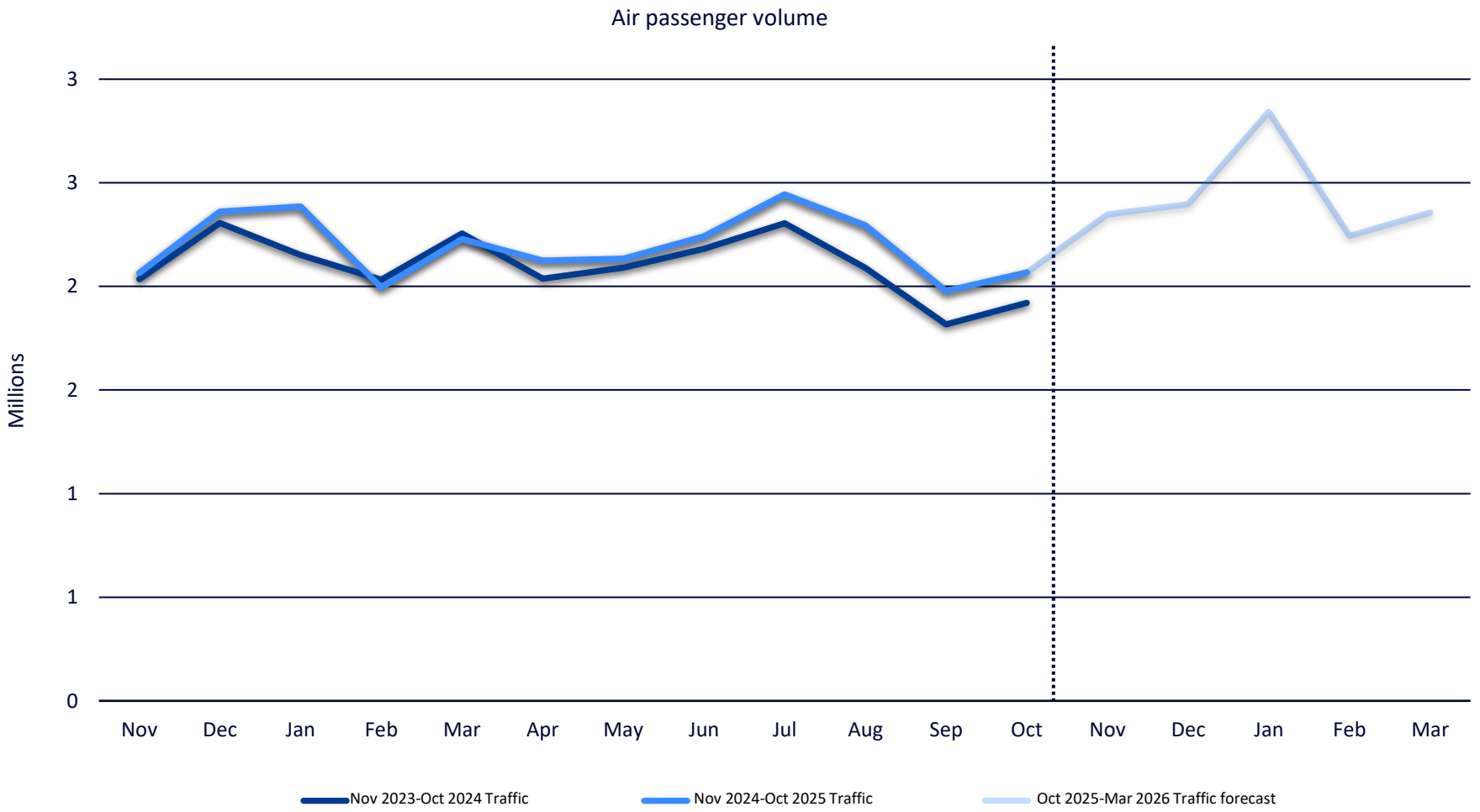
The Americas – Central America



© Amadeus IT Group and its affiliates and subsidiaries

Worldwide to Central America

International and domestic passenger traffic



Source: Destination Gateway™ as of Sunday, 16 November 2025

4.3%

year-on-year growth in passenger traffic

Where do visitors come from? Reality vs. aspirations

Top origin markets **searching** for Central America

Origin market	Nov.23-Oct.24 ranking	Nov.24-Oct.25 ranking
United States	1	1
Canada	2	2
Mexico	4	3
Colombia	3	4
Spain	5	5
Germany	6	6
Costa Rica	10	7
Brazil	8	8
United Kingdom	7	9
Guatemala	11	12

Top origin markets **travelling** to Central America

Origin market	Nov.23-Oct.24 ranking	Nov.24-Oct.25 ranking
United States	1	1
Spain	2	2
Canada	3	3
Mexico	4	4
Colombia	5	5
Guatemala	6	6
Costa Rica	12	7
United Kingdom	10	8
Germany	11	9
Panama	9	10



Source: Destination Gateway™ as of Sunday, 16 November 2025

Are travellers from these markets to Central America already on your radar?

Top origin markets **searching** for Central America with the highest growth (among the TOP 30)

Origin market	Nov.24-Oct.25 vs Nov.23-Oct.24 ranking	YoY Growth
China	1	121%
United States	2	43%
Jamaica	3	38%
Argentina	4	28%
Mexico	5	24%
Costa Rica	6	18%
Dominican Rep.	7	14%
Canada	8	13%
Austria	9	12%
Peru	10	11%

Top origin markets **travelling** to Central America with the highest growth (among the TOP 30)

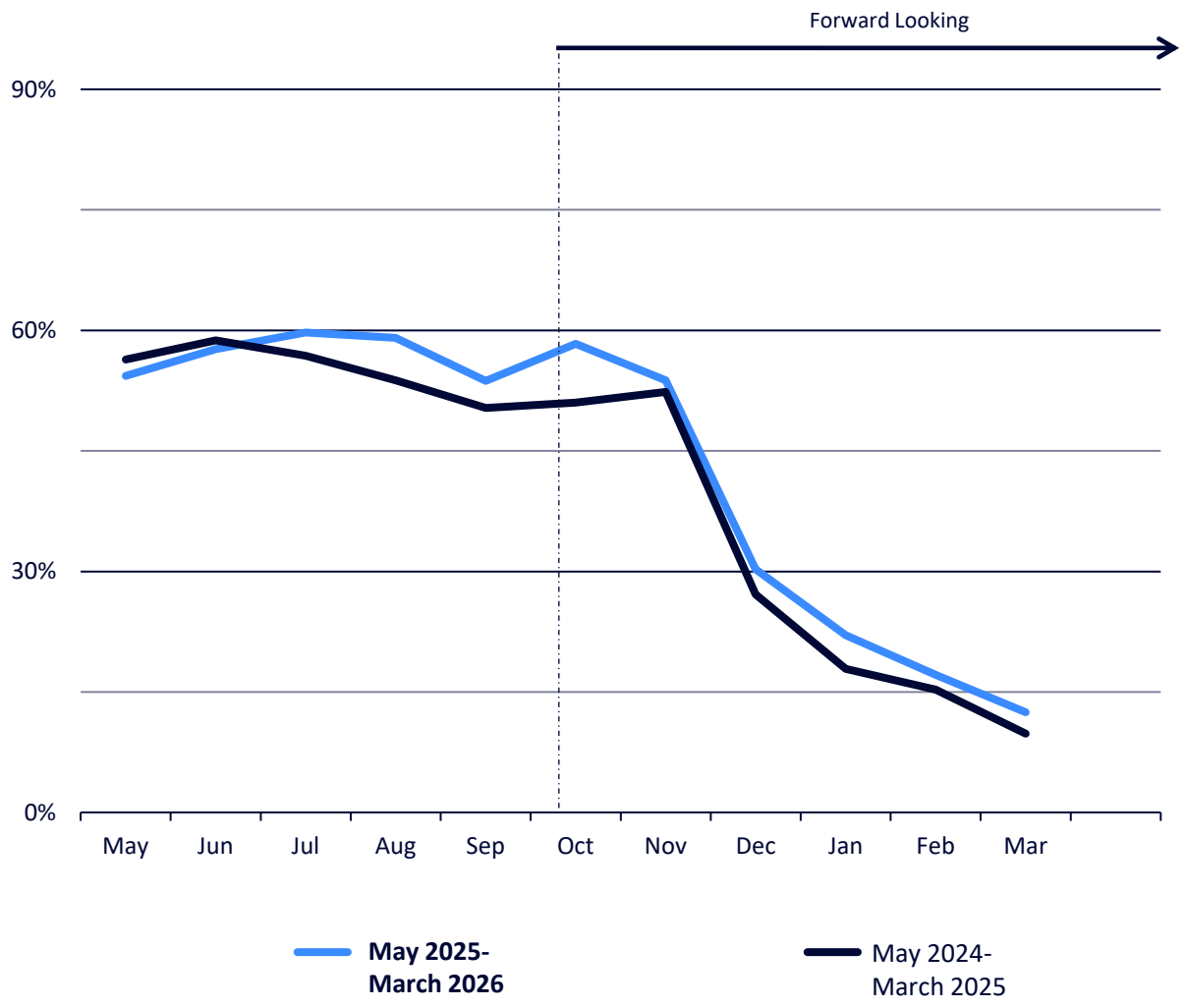
Origin market	Nov.24-Oct.25 vs Nov.23-Oct.24 ranking	YoY Growth
Philippines	1	8%
Costa Rica	2	8%
India	3	3%
Puerto Rico	4	0%
Israel	5	-1%
Belgium	6	-1%
Belize	7	-2%
Italy	8	-3%
United States	9	-5%
Argentina	10	-6%



Source: Destination Gateway™ as of Sunday, 16 November 2025

Hotel Occupancy in Central America

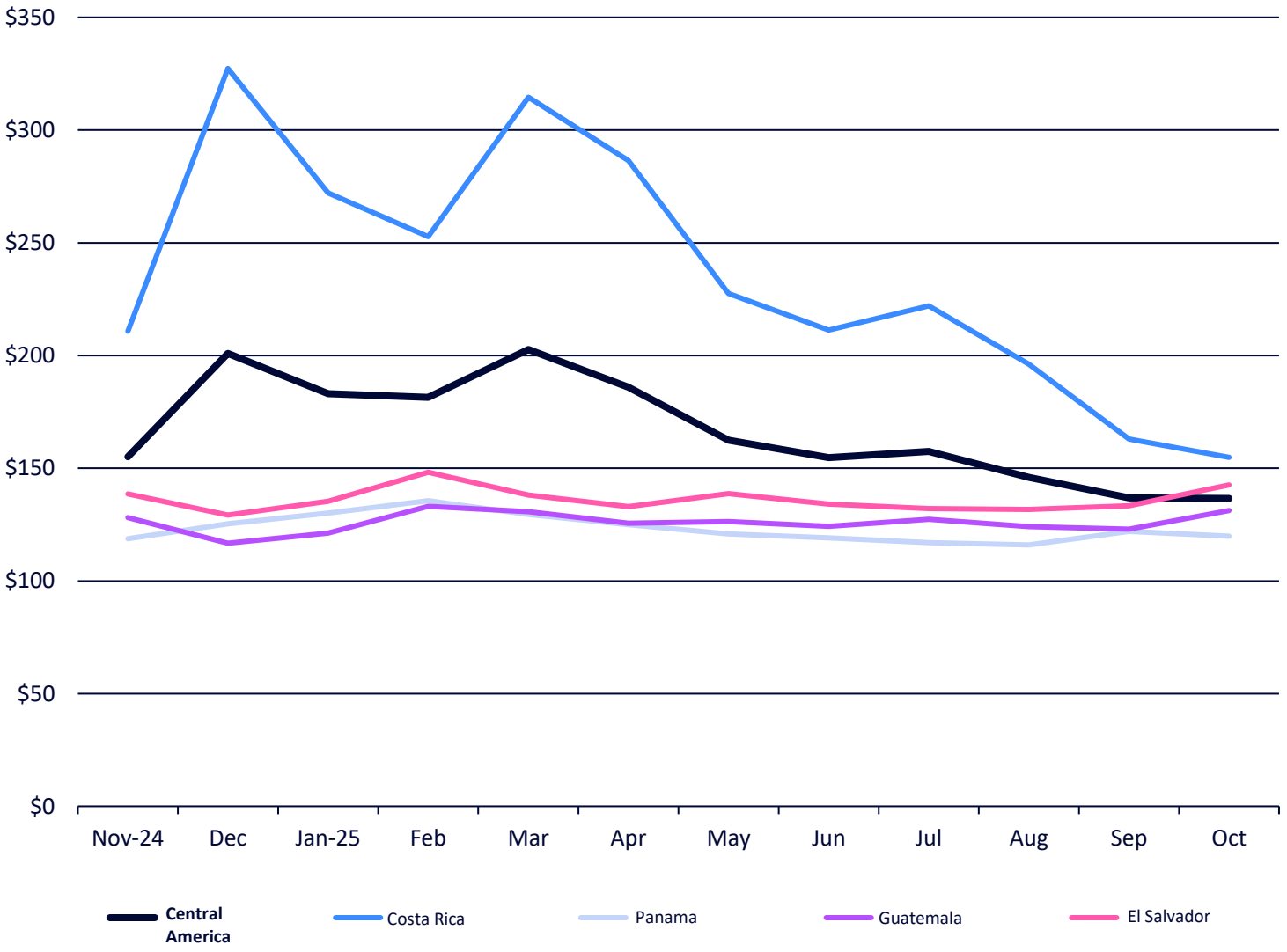
On-the-books by month compared to same month last year



Source: Destination Gateway™ as of Sunday, 16 November 2025



Average Daily Rate (ADR) in USD





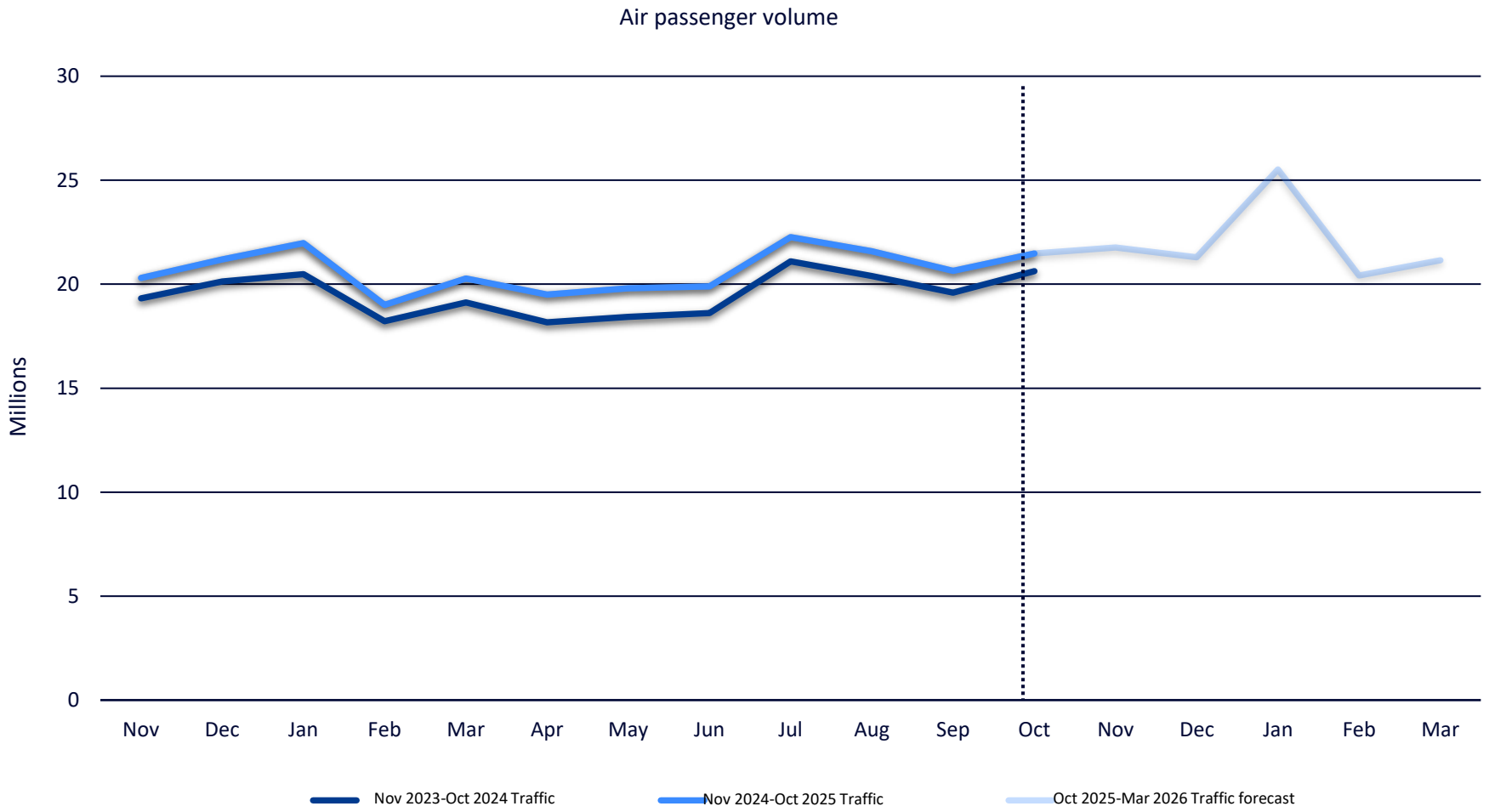
Source: Destination Gateway™ as of Sunday, 16 November 2025

The Americas – South America



Worldwide to South America

International and domestic passenger traffic



5.8%
year-on-year growth
in passenger traffic

Source: Destination Gateway™ as of Sunday, 16 November 2025

amadeus

Where do visitors come from? Reality vs. aspirations

Top origin markets **searching** for South America

Origin market	Nov.23-Oct.24 ranking	Nov.24-Oct.25 ranking
Brazil	1	1
United States	2	2
Argentina	4	3
Colombia	3	4
Chile	5	5
Peru	6	6
Spain	7	7
Mexico	8	8
Canada	9	9
Italy	10	10

Top origin markets **travelling** to South America

Origin market	Nov.23-Oct.24 ranking	Nov.24-Oct.25 ranking
Argentina	1	1
Colombia	2	2
Chile	3	3
Brazil	4	4
United States	5	5
Peru	6	6
Spain	7	7
Bolivia	8	8
Italy	10	9
Ecuador	9	10



Source: Destination Gateway™ as of Sunday, 16 November 2025

Are travellers from these markets to South America already on your radar?

Top origin markets **searching** for South America with the highest growth (among the TOP 30)

Origin market	Nov.24-Oct.25 vs Nov.23-Oct.24 ranking	YoY Growth
China	1	82%
United States	2	35%
Dominican Rep.	3	35%
Portugal	4	34%
Paraguay	5	33%
Argentina	6	29%
Uruguay	7	27%
Chile	8	25%
South Korea (ROK)	9	23%
Japan	10	22%

Top origin markets **travelling** to South America with the highest growth (among the TOP 30)

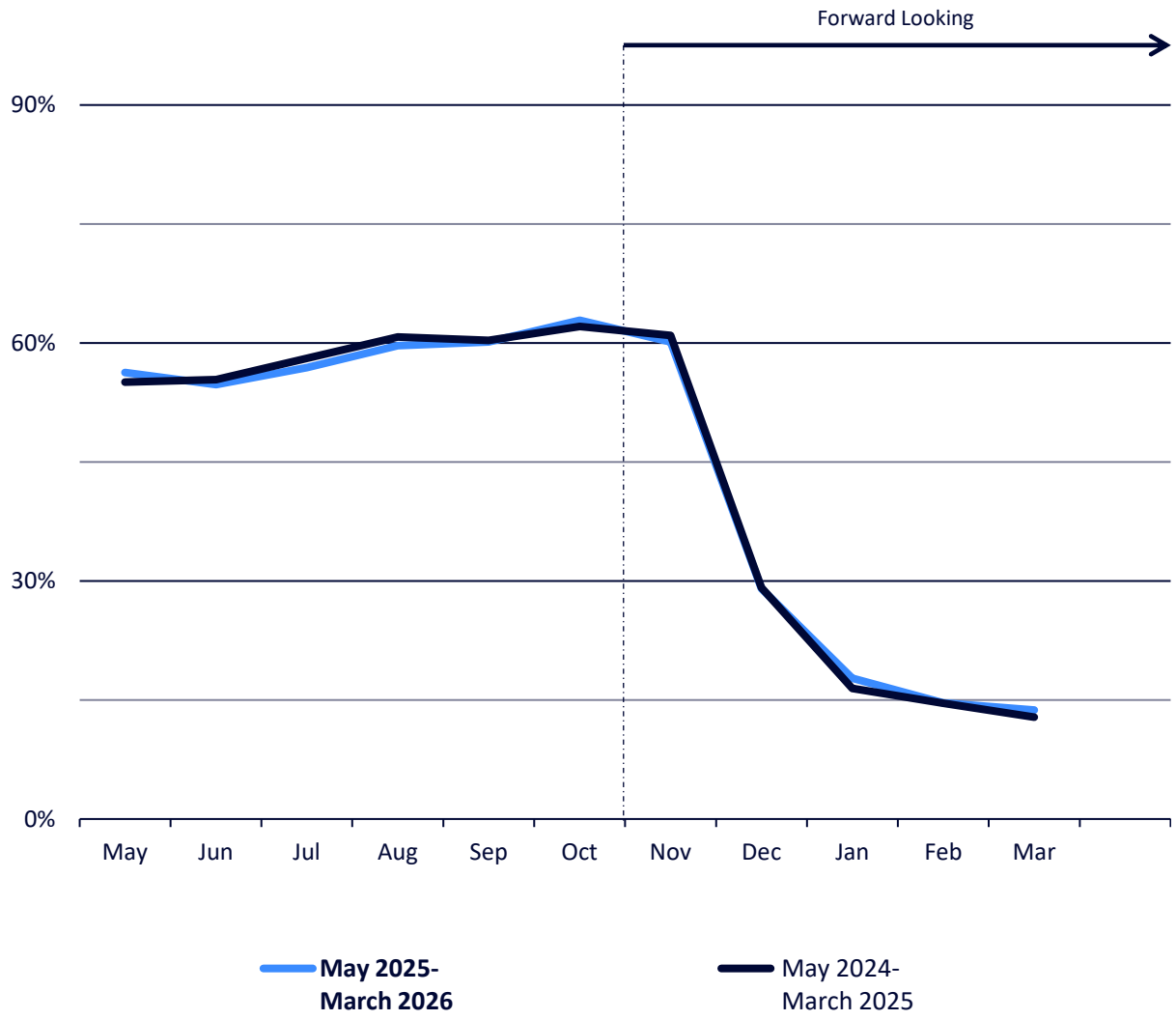
Origin market	Nov.24-Oct.25 vs Nov.23-Oct.24 ranking	YoY Growth
China	1	46%
Puerto Rico	2	32%
Argentina	3	16%
Paraguay	4	8%
Dominican Rep.	5	3%
Philippines	6	3%
Italy	7	2%
Uruguay	8	1%
Peru	9	1%
Australia	10	0%



Source: Destination Gateway™ as of Sunday, 16 November 2025

Hotel Occupancy in South America

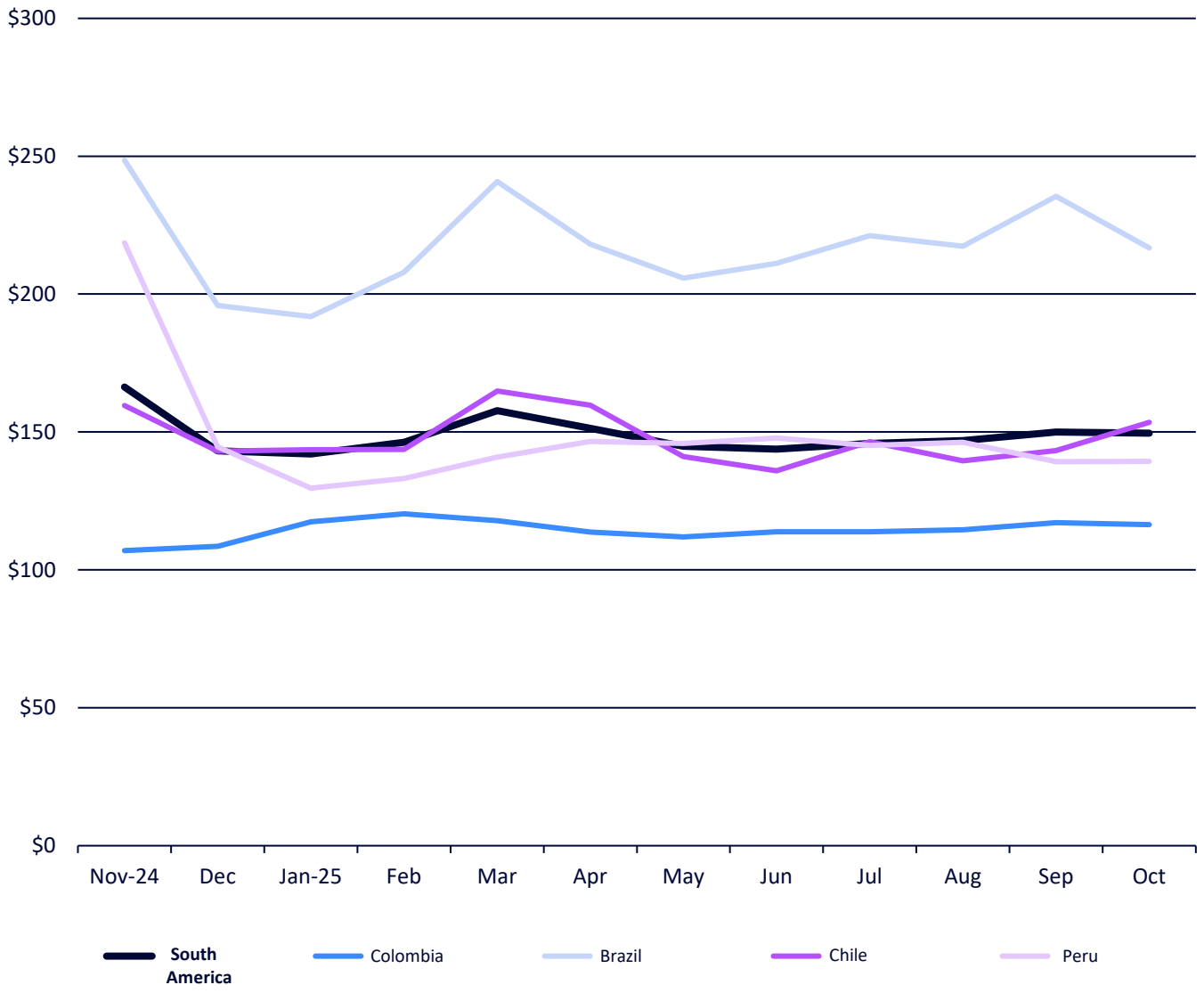
On-the-books by month compared to same month last year



Source: Destination Gateway™ as of Sunday, 16 November 2025



Average Daily Rate (ADR) in USD





Source: Destination Gateway™ as of Sunday, 16 November 2025

Key takeways

Travel demand across the Americas continues to strengthen with year-on-year passenger growth visible in most regions, especially Central America and the Caribbean, where traffic is expanding at a faster pace than North America.

Hotel performance remains resilient, with rising occupancy and solid ADR levels especially during peak months, suggesting that both leisure and VFR segments continue to fuel strong market activity.

Origin-market behavior is diversifying with emerging markets in Asia and Latin America showing some of the fastest YoY growth in search and booking activity

Forward-looking data points to a strong flow of bookings, as on-the-books occupancy trends point to sustained momentum heading into early 2026, supported by stable rates and consistent demand across key destinations



Request your own market landscape report to know:

- 2025/2026 Travel Trends
- Who is searching and visiting your destination
- What was your Hotel occupancy and ADR (12 months)

© Amadeus IT Group and its affiliates and subsidiaries