

**amADEUS**

# Demand Generation

## Market snapshot

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September - December 2025

- [Asia Pacific >>](#)
- [Europe >>](#)
- [North America >>](#)
- [Latin America >>](#)
- [Middle East & Africa >>](#)

# ASIA PACIFIC

The cornerstone of any effective **demand generation strategy** is a deep understanding of your target audience, at every touchpoint.

Powered by **Amadeus Travel Intelligence**, this market snapshot reveals key travel trends in Asia Pacific to inform your decision-making.

Unlock the full potential of your travel data and turn data-driven insights into new business opportunities.

# Key actions

## From Airline data insights



**Identify** new or emerging markets driving demand.

[Learn more>>](#)



**Prepare** for periods of high demand by adjusting your strategy, staffing, and inventory.



**Spot** key segments at every touchpoint to launch targeted marketing campaigns.



**Leverage** the right media channels to maximize visibility and increase bookings. [Learn more>>](#)

Source: Amadeus Navigator360™ data, as of August 15th, 2025.

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## Top 10 searched destinations

SEPT-DECEMBER 2025

2025 Ranking

Vs 2024

1		Japan	=
2		Thailand	=
3		India	=
4		China	=
5		South Korea	↗
6		Australia	↘
7		Indonesia	↗
8		Vietnam	=
9		Philippines	↘
10		Malaysia	=

Global Air Searches towards the region

## Top 10 booked destinations

SEPT-DECEMBER 2025

2025 Ranking

Vs 2024

1		Japan	↗
2		South Korea	↗
3		Australia	↘
4		Thailand	↗
5		China	↘
6		Taiwan	↗
7		India	↘
8		Vietnam	↗
9		Philippines	↘
10		Malaysia	↗

Global Air GDS bookings towards the region

## Top 10 origin markets

SEPT-DECEMBER 2025

2025 Ranking

Vs 2024

1		South Korea	↗
2		Japan	↗
3		Australia	=
4		USA	↗
5		China	=
6		Taiwan	↗
7		Thailand	↘
8		UK	↗
9		Malaysia	↗
10		Vietnam	=

Air GDS bookings from all global origin markets for travel between Sep. and Dec. 2025



Hotels drive stays. Destination Management Organizations can, too. [See How >>](#)



APAC KEY HOTEL KPIs (YTD)

	Occupancy	ADR	RevPAR
2025	67.0%	↑ \$144	↑ \$96
2024 (same period)	67.6%	\$140	\$94

Sep-Dec 2025 Occupancy rate (Vs Same time period, 2024)



# Key actions

## From Hotel data insights



**Benchmark** to make smarter decisions.

[Learn more>>](#)



**Understand** key metrics like occupancy, ADR, and channel.



**Leverage AI tools** to speed up decisions with faster, sharper insights.

[See how>>](#)



**Optimize** your strategies and special offers.

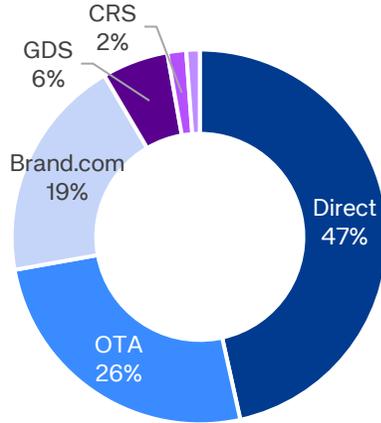


**Implement** multi-channel Digital Marketing plan targeting demand based on lead times and embrace tailored marketing for top markets. [Learn more>>](#)

Source: Demand360@ data, as of August 15th, 2025.

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## Hotel Booking share by channel mix (YTD)

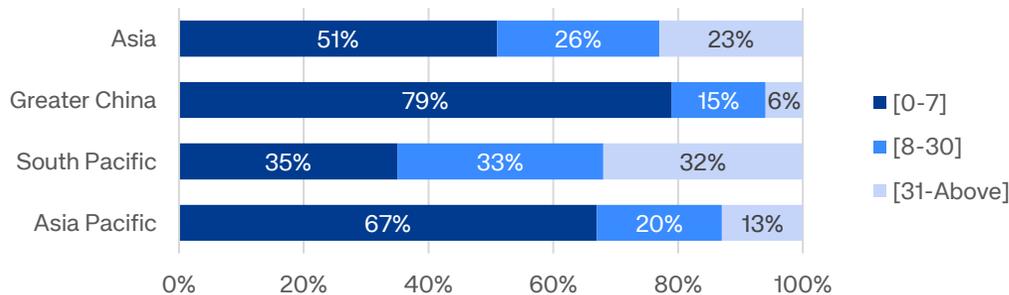


Growth that lasts starts with **the right mix**. Ready to blend it perfectly?

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Booking Channels	Vs 2024
Direct	-2%
OTA	+1%
Brand.com	0%
GDS	+1%
CRS	0%

## Hotel Lead time (by number of days) - YTD



# EUROPE

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# Key actions

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Source: Amadeus Navigator360™ data, as of August 15th, 2025.

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### Top 10 searched destinations

SEPT-DECEMBER 2025

2025 Ranking

Vs 2024

1		Spain	=
2		Italy	=
3		UK	=
4		France	=
5		Germany	=
6		Portugal	=
7		Greece	=
8		Netherlands	=
9		Switzerland	=
10		Ireland	=

Global Air Searches towards the region

### Top 10 booked destinations

SEPT-DECEMBER 2025

2025 Ranking

Vs 2024

1		UK	=
2		Germany	↗
3		Italy	↗
4		Spain	↘
5		France	↘
6		Portugal	↗
7		Switzerland	↗
8		Norway	↘
9		Netherlands	=
10		Greece	↘

Global Air GDS bookings towards the region

### Top 10 origin market

SEPT-DECEMBER 2025

2025 Ranking

Vs 2024

1		USA	=
2		Spain	=
3		Germany	↗
4		Italy	↘
5		Portugal	↗
6		Thailand	↗
7		Japan	↗
8		France	↘
9		UK	↘
10		U.A.E	↗

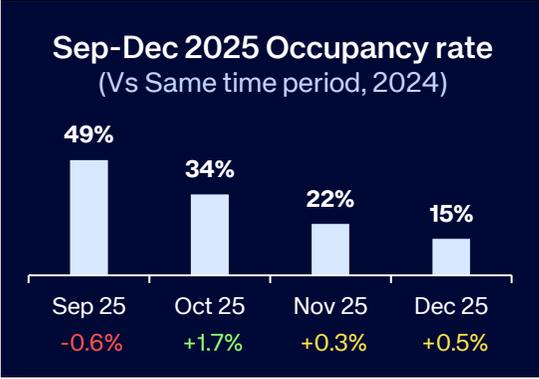
Air GDS bookings from all global origin markets for travel between Sep. and Dec. 2025



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EUROPE KEY HOTEL KPIS (YTD)	Occupancy	ADR	RevPAR
<b>2025</b>	↑ 70.3%	↑ \$226	↑ \$158
<b>2024</b> <small>(same period)</small>	70.0%	\$218	\$152

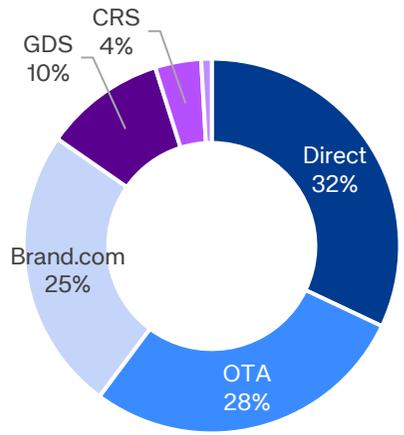


# Key actions

## From Hotel data Insights

- Benchmark** to make smarter decisions. [Learn more>>](#)
- Understand** key metrics like occupancy, ADR, and channel.
- Leverage AI tools** to speed up decisions with faster, sharper insights. [See how>>](#)
- Optimize** your strategies and special offers.
- Implement** multi-channel Digital Marketing plan targeting demand based on lead times and embrace tailored marketing for top markets. [Learn more>>](#)

## Hotel Booking share by channel mix (YTD)

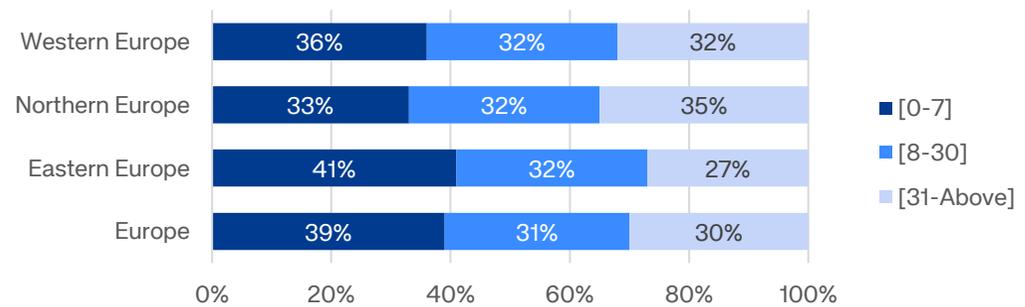


Booking Channels	Vs 2024
<b>Direct</b>	-2%
<b>OTA</b>	+1%
<b>Brand.com</b>	+1%
<b>GDS</b>	0%
<b>CRS</b>	0%

Growth that lasts starts with **the right mix**. Ready to blend it perfectly?

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## Hotel Lead time (by number of days) - YTD



Source: Demand360@ data, as of August15th, 2025.

# NORTH AMERICA

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# Key actions

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**Leverage** the right media channels to maximize visibility and increase bookings. [Learn more>>](#)

Source: Amadeus Navigator360™ data, as of August 15th, 2025.

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### Top 10 searched destinations

SEPT-DECEMBER 2025

2025 Ranking

Vs 2024

1		New York	=
2		Los Angeles	=
3		Miami	=
4		Toronto	=
5		Orlando	=
6		San Francisco	=
7		Chicago	↗
8		Vancouver	↘
9		Honolulu	↗
10		Baltimore	↘

Global Air Searches towards the region

### Top 10 booked destinations

SEPT-DECEMBER 2025

2025 Ranking

Vs 2024

1		New York	=
2		Los Angeles	=
3		Toronto	↗
4		San Francisco	↘
5		Orlando	↗
6		Miami	↗
7		Chicago	↘
8		Boston	=
9		Honolulu	↗
10		Washington	↘

Global Air GDS bookings towards the region

### Top 10 origin markets

SEPT-DECEMBER 2025

2025 Ranking

Vs 2024

1		USA	=
2		Canada	=
3		Mexico	=
4		UK	=
5		Italy	↗
6		Japan	↗
7		France	↗
8		Spain	↗
9		Germany	↘
10		India	↘

Air GDS bookings from all global origin markets for travel between Sep. and Dec. 2025



Hotels drive stays. Destination Management Organizations can too. [See How >>](#)



NORAM KEY HOTEL KPIS (YTD)

	Occupancy	ADR	RevPAR
2025	68.1%	↑ \$184	\$125
2024 (same period)	68.9%	\$181	\$125

Sep-Dec 2025 Occupancy rate (Vs Same time period, 2024)



# Key actions

## From Hotel data Insights



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[Learn more>>](#)



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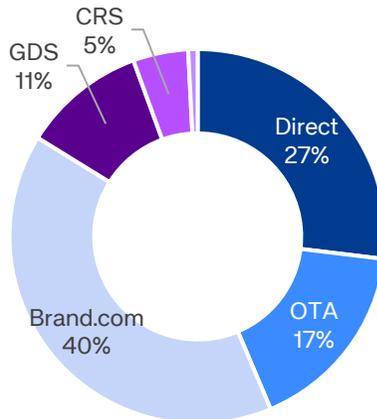


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## Hotel Booking share by channel mix (YTD)

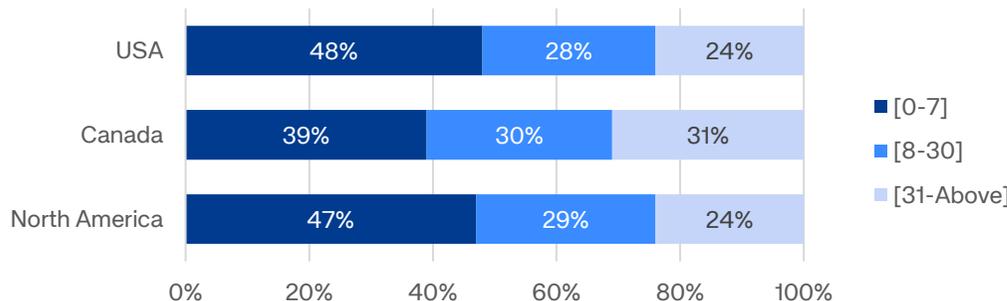


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Booking Channels	Vs 2024
Direct	-1%
OTA	+1%
Brand.com	0%
GDS	+1%
CRS	0%

## Hotel Lead time (by number of days) - YTD



# LATIN AMERICA

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# Key actions

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### Top 10 searched destinations

SEPT-DECEMBER 2025

2025 Ranking

Vs 2024

1		Mexico	=
2		Brazil	=
3		Dom. Rep.	=
4		Colombia	=
5		Argentina	=
6		Peru	=
7		Costa Rica	=
8		Puerto Rico	=
9		Chile	=
10		Ecuador	=

Global Air Searches towards the region

### Top 10 booked destinations

SEPT-DECEMBER 2025

2025 Ranking

Vs 2024

1		Mexico	=
2		Argentina	=
3		Brazil	=
4		Peru	↗
5		Dom. Rep.	↗
6		Chile	↘
7		Colombia	↘
8		Puerto Rico	↗
9		Costa Rica	↗
10		Ecuador	=

Global Air GDS bookings towards the region

### Top 10 origin market

SEPT-DECEMBER 2025

2025 Ranking

Vs 2024

1		USA	=
2		Argentina	↗
3		Mexico	↘
4		Spain	↗
5		Brazil	↗
6		Canada	↗
7		Italy	↗
8		Chile	↘
9		Peru	↘
10		France	=

Air GDS bookings from all global origin markets for travel between Sep. to Dec. 2025



Hotels drive stays. Destination Management Organizations can too.

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LATAM KEY HOTEL KPIS (YTD)

	Occupancy	ADR	RevPAR
2025	61.2%	\$177	\$107
2024 (same period)	61.7%	\$179	\$110

Sep-Dec 2025 Occupancy rate (Vs Same time period, 2024)



# Key actions

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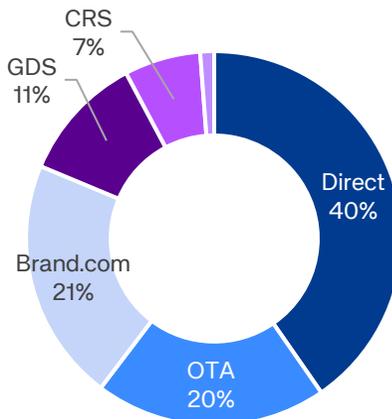


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## Hotel Booking share by channel mix (YTD)

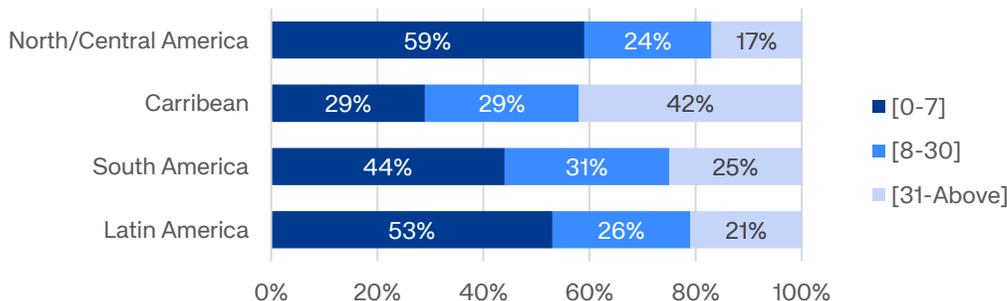


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Booking Channels	Vs 2024
Direct	-3%
OTA	+2%
Brand.com	0%
GDS	0%
CRS	0%

## Hotel Lead time (by number of days) - YTD



# MIDDLE EAST & AFRICA

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## Top 10 searched destinations

SEPT-DECEMBER 2025

2025 Ranking

Vs 2024

1		U.A.E	=
2		Turkey	=
3		Egypt	=
4		South Africa	=
5		Saudi Arabia	↗
6		Morocco	↘
7		Tanzania	=
8		Mauritius	=
9		Israel	↗
10		Kenya	↘

Global Air Searches towards the region

## Top 10 booked destinations

SEPT-DECEMBER 2025

2025 Ranking

Vs 2024

1		U.A.E	↗
2		South Africa	↗
3		Egypt	=
4		Turkey	=
5		Saudi Arabia	↘
6		Israel	↗
7		Mauritius	↗
8		Morocco	=
9		Tanzania	↗
10		Qatar	↘

Global Air GDS bookings towards the region

## Top 10 origin markets

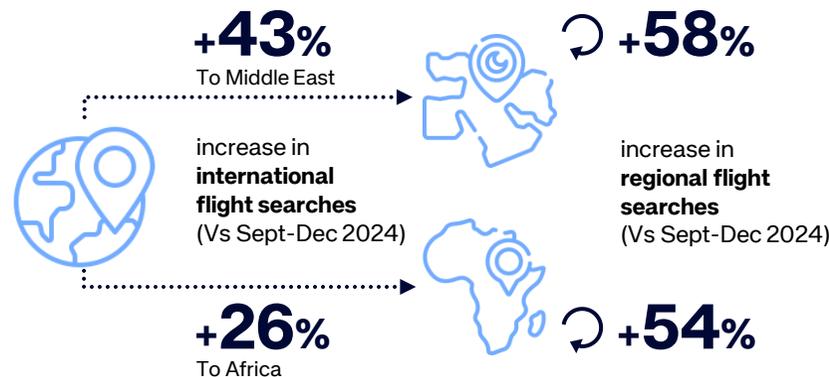
SEPT-DECEMBER 2025

2025 Ranking

Vs 2024

1		UK	↗
2		France	↗
3		Germany	↗
4		USA	↗
5		South Africa	↘
6		Egypt	↘
7		Italy	↗
8		Spain	↗
9		Australia	↘
10		Switzerland	↗

Air GDS bookings from all global origin markets for travel between Sep. to Dec. 2025



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MEA KEY HOTEL KPIS (YTD)

	Occupancy	ADR	RevPAR
2025	↑ 64.3%	↑ \$207	↑ \$132
2024 (same period)	62.1%	\$201	\$124

Sep-Dec 2025 Occupancy rate (Vs Same time period, 2024)



# Key actions

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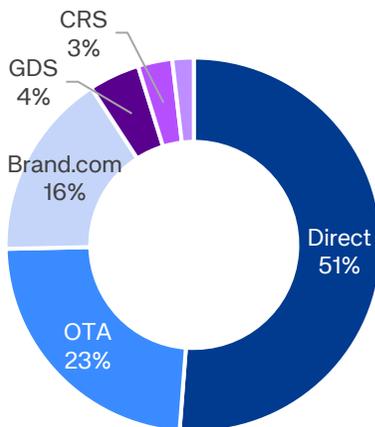


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### Hotel Booking share by channel mix (YTD)



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Booking Channels	Vs 2024
Direct	-3%
OTA	0%
Brand.com	+1%
GDS	0%
CRS	0%

### Hotel Lead time (by number of days) - YTD

