

amadeus



In collaboration with  
UN Tourism

# Travel Insights

Focus on  
Americas

# 2024

September to December

## About This Report

Building on the success of the previous two editions, this third Travel Insights: Focus on Americas report is the result of a collaborative effort between Amadeus and UN Tourism, offering updated insights on key travel trends in the Americas for the period from September to December 2024.

Tailored to the unique dynamics of the Americas and its subregions, the report delivers comprehensive, forward-looking data on traveler demand, market trends, aviation, and other factors shaping the tourism sector. These insights empower policy makers and industry players to monitor shifts in the market and anticipate changes, enabling them to keep ahead of the curve.

The Report is designed to support National Tourism Administrations (NTAs) and National Tourism Organizations (NTOs), Destination Management Organizations (DMOs), and private sector entities in building strategic plans and making informed decisions to drive tourism growth in their areas.

It begins with an overview of travel trends in the Americas, focusing on top searched and booked markets, destinations of interest, leading origin markets, and air travel capacity forecasts.

It then provides a deep dive into each of the four subregions including North America, Central America, South America, and the Caribbean. Within each subregion, the report also highlights trends related to the most searched and booked destinations, enabling strategic decision-making on how to capture the interest of travelers already considering a destination in the Americas or a particular subregion.

The report includes insights as of August 16, 2024, from Amadeus Navigator360™, including the following data sets: Amadeus Air Searches, Amadeus Air Bookings, and Amadeus Air Schedules.

This updated report also offers a refined perspective by comparing forward-looking insights for September to December 2024 with the same period in 2023. This year-over-year comparison provides valuable context, allowing industry stakeholders to better understand pacing and track performance with greater alignment between forward-looking and historical data.



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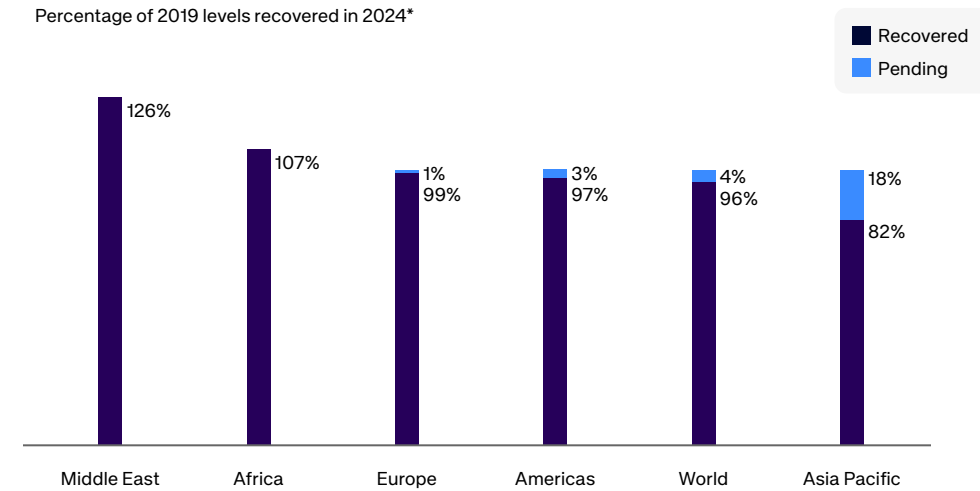
# Global Overview



## World Tourism Barometer International Tourism

### International Tourist Arrivals

Percentage of 2019 levels recovered in 2024\*



Source: UN Tourism, World Tourism Barometer, September 2024.

\* Refers to provisional figure or data

According to the latest World Tourism Barometer by UN Tourism, around 790 million tourists traveled internationally in the first seven months of 2024, about 11% more than in 2023 and only 4% less than in 2019.

Data shows a strong start to the year, followed by a more modest second quarter. With increased air connectivity and visa facilitation supporting the recovery in international travel, the data shows all world regions have recorded a strong year so far. The Americas recovered 97% of pre-pandemic arrivals this seven-month period, backed by solid intraregional demand. Strong travel from the United States benefitted destinations in Central America (+18.6% as compared to the same period of 2019) and the Caribbean (+8.7% as compared to 2019) in particular. Arrivals to North America remained 7% below pre pandemic levels and South America 4.3% below.

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Regional Overview

# The Americas



Despite the challenges posed by inflation, the U.S. election, and other geopolitical factors, all subregions in the Americas are experiencing growth and high demand for travel during the peak season.

Travelers are showing confidence as they are planning and booking their trips earlier compared to last year, which is reflected in the year-over-year (YoY) increase in searches and travel agency bookings. This shift in travel behavior is a notable trend in 2024.

For many travelers, North America continues to be the favored subregion. The United States, Canada, and Mexico maintain their top spots in the rankings, drawing significant interest from tourists. A number of destinations in the Americas are seeing notable year-over-year increases in bookings, marked by double-digit growth. Peru and Brazil stand out, in particular.

With the easing of travel restrictions, China and Japan have seen remarkable year-over-year growth as major origin markets heading to the North America subregion.

Due to its favorable economic conditions, Mexico is emerging as a more significant origin market in the region. The peso is at an all-time high, making travel to other destinations in the Americas more accessible for Mexican travelers.

While the distribution of seats to the region remains comparable to 2023, South America has seen an increase in its share due to the introduction of new flight routes.

South American countries are seeing a surge in travel and emerging as strong outbound players, thanks to their favorable economic and political conditions.

## Air Searches to the Americas

### Top 10 Searched Destinations

Including Year-over-Year Volume Growth Achievement, Sep – Dec 2024 vs. 2023

	YOY Growth	2024 Rank	2023 Rank
U.S.	7%	1	1
Canada	8%	2	2
Mexico	19%	3	3
Brazil	11%	4	4
Argentina	1%	5	5
Columbia	27%	6	6
Dominican Republic	20%	7	7
Peru	24%	8	8
Chile	29%	9	9
Costa Rica	16%	10	10

The list of top 10 searched destinations remains the same as what it was in 2023, with no changes in the ranking order with The U.S., Canada, and Mexico topping the list and sparking significant travel interest.

The highest year-over-year growth rate was achieved by Chile with 29%, followed by Colombia with 27% and Peru with 24%, highlighting the increased interest to travel to South America.

### Top 5 Searched Countries with the Highest Volume Growth

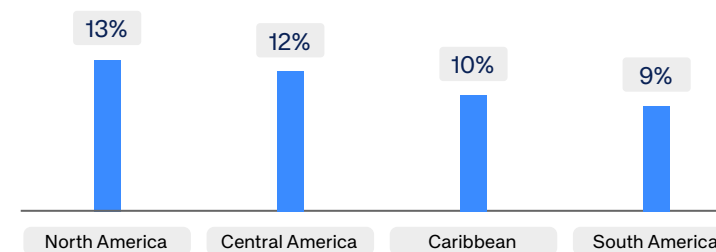
Calculated Among Top 30 Most Searched Countries Based on Search Volume, Sep – Dec 2024 vs. 2023

	YOY Growth	2024 Rank	2023 Rank
Curaçao	30%	20	23
Chile	29%	9	9
Columbia	27%	6	6
El Salvador	25%	17	19
Peru	24%	8	8

When analyzing the top 5 searched countries based on search volume growth, Curaçao is seeing a surge in demand. It experiences a 30% increase in year-over-year search volume and rises three places in the global ranking. El Salvador experiences a 25% year-over-year rise in search volume, moving up two ranks compared to 2023.

### Year-over-Year Search Volume Growth Achievement by Subregion

Sep – Dec 2024 vs. 2023



Search volumes in North America have increased by 13% over the past year, with Central America showing similar growth.



## GDS Air Bookings to the Americas

### Top 10 Booked Destinations

Including Year-over-Year Volume Growth Achievement, Sep – Dec 2024 vs. 2023

	YOY Growth	2024 Rank	2023 Rank
U.S.	10%	1	1
Mexico	-1%	2	2
Canada	6%	3	4
Dominican Republic	-2%	4	3
Brazil	33%	5	5
Argentina	-15%	6	6
Jamaica	-16%	7	7
Peru	42%	8	10
Columbia	3%	9	8
Costa Rica	1%	10	9

Although the top booked destinations based on GDS booking volumes remained largely the same from 2023 to 2024, there has been a slight shift in their rankings.

Peru has seen a 42% year-over-year increase in bookings, reclaiming its strong position as one of the most popular destinations in the region post-pandemic. Experiencing notable year-over-year growth, the country has advanced by two positions on the list.

Although Brazil maintains its ranking position, it too witnessed significant growth of 33%.

### Top 5 Booked Countries with the Highest Volume Growth

Calculated Among Top 30 Most Booked Countries Based on Booking Volume, Sep – Dec 2024 vs. 2023

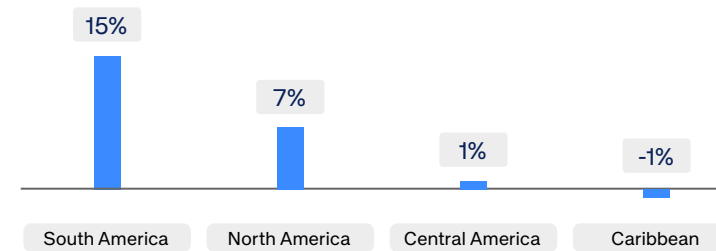
	YOY Growth	2024 Rank	2023 Rank
Paraguay	43%	25	28
Peru	42%	8	10
Brazil	33%	5	5
Bolivia	31%	21	25
El Salvador	27%	18	19

The year-over-year growth rate of the 5 top booked countries based on GDS booking volume has been truly impressive, ranging from 27% to 43%.

Paraguay, Peru and Bolivia were among destinations with the most notable results. Paraguay rose from the 28th to the 25th position, Peru moved up from the 10th to 8th position, and Bolivia climbed from the 25th to the 21st position. This indicates that these South American countries have become more popular destinations for travelers booking through travel agencies over the past year.

### Year-over-Year Booking Volume Growth Achievement by Subregion

Sep – Dec 2024 vs. 2023

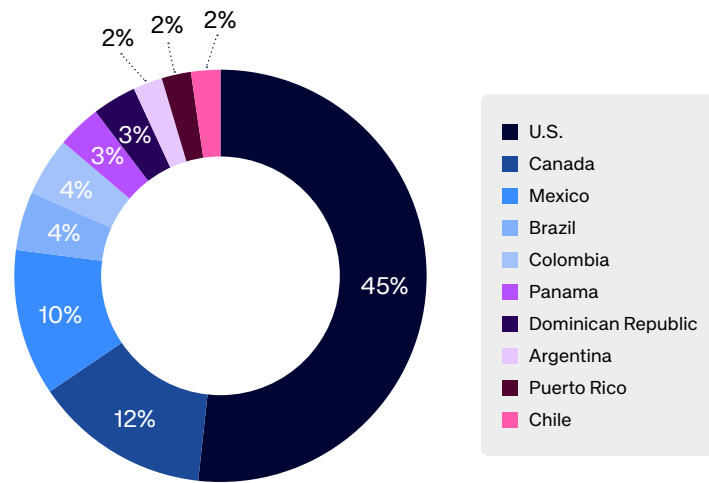


The data indicates that South America experienced the most significant growth in bookings, with a rate of 15%, which is likely attributable to the robust travel demand driven by the region's leading destinations.

## Available Seats to the Americas

### Available Seats by Country

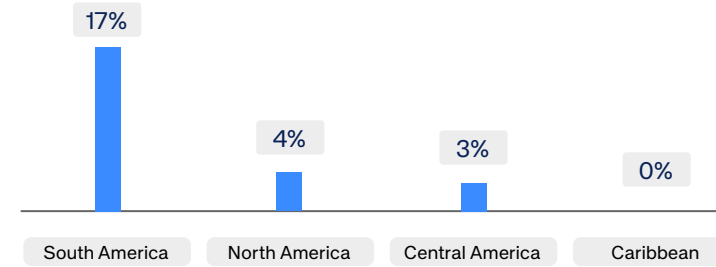
Sep - Dec 2024



Examining the seat distribution to the Americas by country reveals minimal changes in the top 10 positions. The U.S. remains at the forefront with a 45% share, while Canada and Mexico hold 12% and 10% shares, respectively. The rise in seat availability, frequently influenced by increasing travel demand to these regions, is an important aspect to monitor.

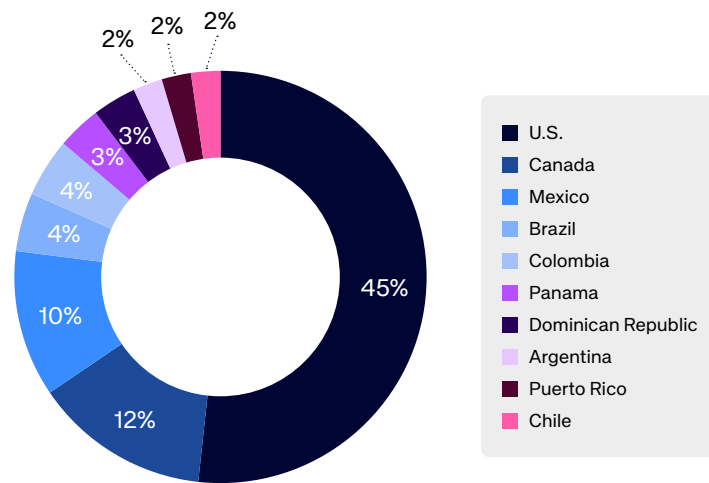
### Year-over-Year Seat Volume Growth Achievement by Subregion

Sep - Dec 2024



The total number of available seats increased by 17% in South America from 2023 to 2024, largely due to the addition of new routes. Both North and Central America experienced a small increase in air capacity.

Sep - Dec 2023



## Origin Market Focus

### Top 10 Origin Markets Searching for the Americas

Including Year-over-Year Volume Growth Achievement, Sep – Dec 2024 vs. 2023

	YOY Growth	2024 Rank	2023 Rank
U.S.	20%	1	1
Brazil	12%	2	3
UK	6%	3	2
Canada	20%	4	4
Germany	-2%	5	5
Spain	-4%	6	6
France	-1%	7	7
Italy	7%	8	8
Argentina	12%	9	9
Mexico	18%	10	10

Travelers from the Americas are interested in traveling within the region. Notably, South American markets are becoming increasingly relevant as origin markets for the Americas, experiencing a strong year-over-year growth for regional trips. Brazil increased one position in the ranking of top 10 origin markets searching for the Americas, moving from third to second place.

### Top 5 Origin Markets with the Highest Volume Growth

Calculated Among Top 30 Most Searched Countries Based on Search Volume, Sep – Dec 2024 vs. 2023

	YOY Growth	2024 Rank	2023 Rank
China	53%	15	19
Japan	36%	11	13
Chile	31%	17	18
Canada	20%	4	4
U.S.	20%	1	1

One of the most notable trends in the travel industry is the resurgence of Chinese travelers, who are showing a renewed confidence and interest in exploring distant destinations. This is largely due to the improved air connectivity and the easing of travel restrictions in many countries. China is among the top 30 origin markets based on search volume, showing a year over year growth of 53% compared to last year.

The travel demand from Japan also shows a notable increase, growing by 36% and following a similar trend.

Chile is also experiencing a strong increase of travel interest in the region, rising one position from last year.



Subregion Overview:

# North America



## North America Spotlight

Traveler interest in North America remains high, with the U.S. again being the most searched destination in the region from September to December 2024, as it was last year.

When looking at cities with the highest year-over-year growth in travel interest among the top 30 searched, Puerto Vallarta and Guadalajara in Mexico and Calgary in Canada stand out.

New York City is the leading destination in terms of search popularity and bookings within the subregion, while Toronto and Los Angeles also contribute significantly to travel demand. Cancun and Miami lead the way in travel agency bookings.

Travelers from the U.S., UK, Canada and Brazil provide the top search volumes to North America for September through December 2024.

The origin markets with the highest growth of search volumes from 2023 to 2024 include Japan, the U.S., Canada, Mexico, and Brazil. Notably, Japan demonstrated a growth of 40% year over year.




The U.S. represents 20% of air seats to the subregion, while inter-regional flights are gaining traction, with Mexico and Canada holding notable shares of 13% and 11%, respectively. Beyond the Americas, the UK has the largest share of air capacity at 7%.

An analysis of direct routes to North America from September to December 2024 showed slight declines from the U.S. and Mexico, with most countries seeing small year-over-year decreases.

## Air Searches and GDS Air Bookings to North America

### Top Searched Destinations











Including Year-over-Year Volume Growth Achievement, Sep – Dec 2024 vs. 2023

	YOY Growth	2024 Rank	2023 Rank
 U.S.	7%	1	= 1
 Canada	8%	2	= 2
 Mexico	19%	3	= 3

Mexico shows noteworthy year-over-year search volume growth of 19%, continuing the trend from last year, as beach destinations became more popular during the winter holiday season.

### Top 10 Searched Cities with the Highest Volume Growth

Calculated Among Top 30 Most Searched Cities Based on Search Volume, Sep – Dec 2024 vs. 2023

	YOY Growth	2024 Rank	2023 Rank
 Puerto Vallarta, Mexico	27%	21	↑ 24
 Guadalajara, Mexico	27%	24	↑ 27
 Calgary, Canada	22%	16	↑ 18
 Fort Lauderdale, U.S.	22%	15	↑ 17
 San Jose del Cabo, Mexico	21%	22	↑ 25
 Mexico City, Mexico	20%	8	↑ 10
 Miami, U.S.	19%	5	↑ 6
 Orlando, U.S.	17%	6	↑ 7
 Vancouver, Canada	14%	7	↑ 9
 Dallas, U.S.	13%	18	↑ 20

Reflecting the strong year-over-year travel demand growth from Mexico, the top 10 most searched cities, chosen from the top 30 by search volume, show a similar trend. Notably, most growth is outside the top 10, with Puerto Vallarta and Guadalajara leading the list and climbing significantly in rank.

### Top 10 Searched and Booked Cities

Sep – Dec 2024

#### Top 10 Searched Destination Cities



#### Top 10 Booked Destination Cities



U.S. cities lead the list of top searched and booked destinations in North America with New York City capturing the biggest share.

While San Jose del Cabo isn't among the top 10 searched cities, it ranks high in bookings due to its appeal as a leisure spot working with tour operators and travel agencies.

## Origin Market Focus

### Top 10 Origin Markets Searching for the Subregion

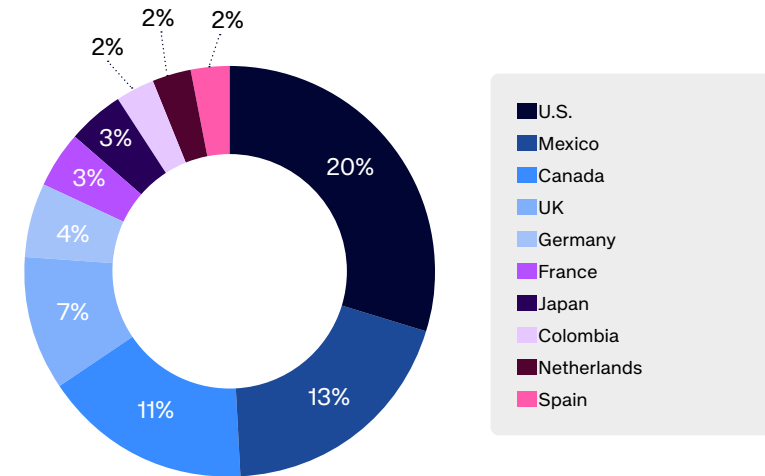
Sep – Dec 2024 vs. 2023

	YOY Growth	2024 Rank	2023 Rank
U.S.	29%	1	1
UK	11%	2	2
Canada	25%	3	3
Brazil	21%	4	4
Germany	-1%	5	5
France	-1%	6	7
India	-2%	7	6
Japan	40%	8	11
Italy	9%	9	8
Mexico	23%	10	10

Among the top 10 origin markets searching to travel to North America, Japan stands out, jumping three spots with a 40% increase in searches year over year. The U.S. leads the ranking showing a 29% growth, while Canada is third with a 25% rise.

### Available Seats to North America by Origin Market











(Domestic travel excluded),  
Sep – Dec 2024



Excluding domestic travel, inter-regional flights are on the rise, with Mexico and Canada accounting for a notable share of seats—13% and 11%, to the North American subregion. Beyond the Americas, the United Kingdom boasts the largest air capacity share at 7%.

### Number of Direct Routes to North America

Sep – Dec 2024 vs. 2023

	2024	Variance	2023
 U.S.	709	↑	671
 Mexico	522	↑	495
 Canada	468	↑	456
 UK	111	↓	113
 Germany	98	↑	94
 France	78	↑	77
 Japan	57	↑	55
 Colombia	63	=	63
 Netherlands	46	↑	43
 Spain	56	↑	54

In examining the direct routes to North America between September and December 2024, the U.S. and Mexico saw the largest increase from 2023. Other countries experienced minor year-over-year increases, with the UK seeing a small decrease and Colombia maintaining the same number of direct routes.





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Subregion Overview:

# Central America



## Central America Spotlight

Traveler interest in Central America is strong, with Costa Rica being the top searched destination from September to December, closely followed by Panama, as it was last year.

When looking at cities with the highest year-over-year growth in travel interest among the top 30 searched, Costa Rican cities lead the way with significant year-over-year growth: La Fortuna (109%), Palma Sur (55%), and Liberia (43%).

San Jose in Costa Rica is the leading destination in terms of search popularity and bookings within the subregion, while Panama and San Salvador significantly contribute to travel demand. San Salvador and Liberia lead in travel agency bookings.

We acknowledge El Salvador as a regional success story in destination promotion. The foundation of this achievement is the country's stability, which significantly boosts travel interest and bookings.

For the period from September through December 2024, travelers from the U.S., Canada, and Germany generate the highest search volumes for Central America.

The origin markets showing the largest increase in search volumes year-over-year are Argentina, the U.S., Colombia, and Canada. Argentina exhibits a significant year-over-year growth rate of 45% in searches to Central America.

The U.S. accounts for 46% of air seats to the subregion, while Colombia achieves a significant double-digit share at 14%.

An analysis of direct routes to Central America from September to December 2024 shows a slight increase from the U.S., Ecuador, Brazil, and Spain. Other countries experienced small declines, while Argentina's number of direct routes remained unchanged.

## Air Searches and GDS Air Bookings to Central America

### Top Searched Destinations











Including Year-over-Year Volume Growth Achievement, Sep – Dec 2024 vs. 2023

	YOY Growth	2024 Rank	2023 Rank
 Costa Rica	16%	1	1
 Panama	7%	2	2
 El Salvador	25%	3	4
 Guatemala	14%	4	3
 Honduras	3%	5	5
 Nicaragua	0%	6	6
 Belize	4%	7	7

The top most searched destinations have seen little change in their rankings compared to last year. Costa Rica remains at the top, demonstrating a healthy 16% year-over-year growth in search volumes. El Salvador has shown significant growth of 25%, moving up to third place.

### Top 10 Searched Cities with the Highest Volume Growth

Calculated Among Top 30 Most Searched Cities Based on Search Volume, Sep – Dec 2024 vs. 2023

	YOY Growth	2024 Rank	2023 Rank
 La Fortuna, Costa Rica	109%	14	23
 Palmar Sur, Costa Rica	55%	29	38
 Liberia, Costa Rica	43%	5	5
 San Salvador, El Salvador	25%	3	4
 Coxen Hole, Honduras	21%	10	10
 Tambor, Cost Rica	16%	19	21
 Flores, Guatemala	15%	17	19
 Guatemala City, Guatemala	14%	4	3
 San Pedro Sula, Honduras	13%	8	8
 Rio Hato, Panama	12%	24	26

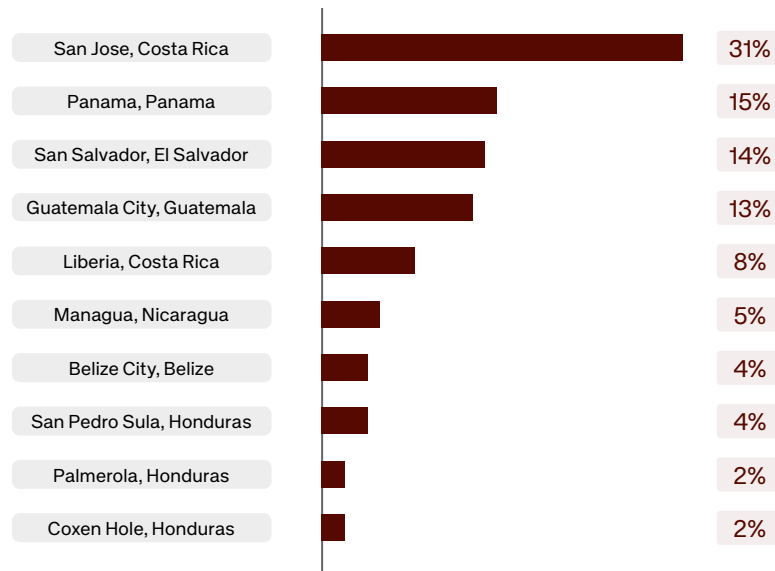
Costa Rica is gaining popularity at the city level, attracting interest outside of the main destination cities. Among the top 30 most searched cities, the top 10 includes three Costa Rican cities with significant year-over-year growth: La Fortuna (109%), Palma Sur (55%), and Liberia (43%). This indicates these cities are emerging as top travel preferences for travelers to Costa Rica, underscoring a growing preference among travelers for Costa Rican destinations during the specified winter months.

These evolving traveler preferences emphasize the need for industry stakeholders to adapt strategies and enhance offerings to cater to the growing demand for these preferred options within the region.

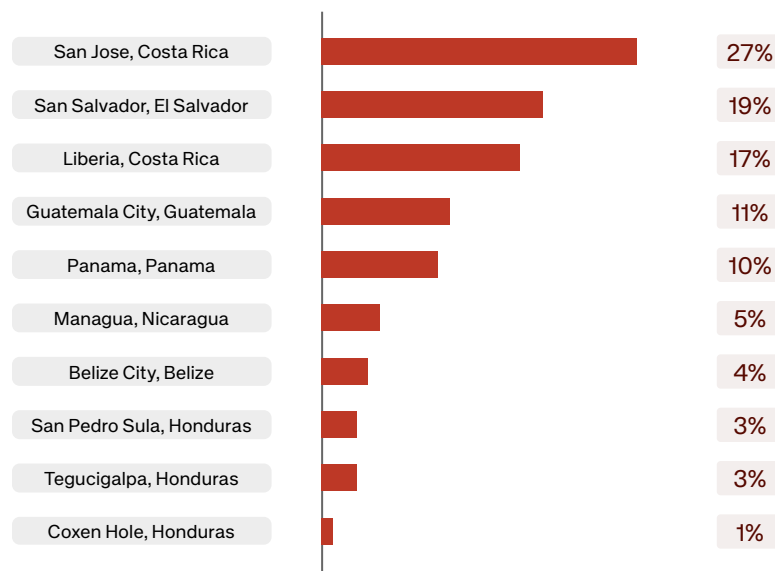
## Top 10 Searched and Booked Cities

Sep – Dec 2024

### Top 10 Searched Destination Cities



### Top 10 Booked Destination Cities



Costa Rican destinations consistently lead GDS bookings in Central America, with San Jose, Costa Rica leading as the most searched for and booked destination.

Additionally, San Salvador experiences a substantial surge, in the second position as the most booked destination, signaling a rising popularity and heightened allure of San Salvador as a pivotal destination in Central America.

The destination cities in Honduras are highly popular vacation spots for US travelers. It's not surprising to see them among the top searched and booked destinations.

## Origin Market Focus

### Top 10 Origin Markets Searching for the Subregion

Sep – Dec 2024 vs. 2023

	YOY Growth	2024 Rank	2023 Rank
U.S.	28%	1	1
Canada	21%	2	2
Germany	-11%	3	3
Spain	-7%	4	4
Colombia	24%	5	5
Mexico	6%	6	6
UK	-8%	7	7
Brazil	16%	8	9
France	-16%	9	8
Argentina	45%	10	11

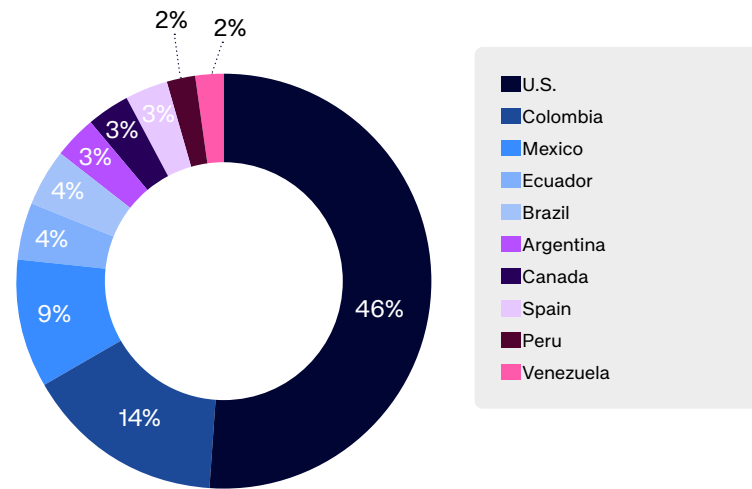
There has been little change in ranking between 2023 and 2024. The U.S. remains dominant as the leading origin market, with a 28% year-over-year increase in search volume.

South American markets are also experiencing growth, with travelers from Colombia, Brazil, and Argentina increasingly keen to plan trips to Central America. Brazil and Argentina have both risen by one position in the rankings due to their strong double-digit year-over-year growth rates.

Conversely, demand for travel from Europe is declining, highlighting the necessity for industry stakeholders to reassess their promotional tactics and closely monitor accessibility to the destination.

### Available Seats to Central America by Origin Market

Sep – Dec 2024



The U.S. dominates as the leading source of international seats to Central American destinations, holding a 46% share. Other countries contribute less significantly, with only Colombia achieving a double-digit share at 14%. These trends highlight the evolving air travel patterns to Central America and offer crucial insights for industry stakeholders to adapt strategies and address the shifting demands of travelers from various origin markets during the given timeframe.

### Number of Direct Routes to Central America

Sep – Dec 2024 vs 2023

	2024	Variance	2023
U.S.	154	↑	153
Colombia	25	↓	26
Mexico	27	↓	31
Ecuador	9	↑	8
Brazil	8	↑	6
Argentina	4	=	4
Canada	22	↓	29
Spain	9	↑	8
Peru	4	=	4
Venezuela	10	↓	13

For the September to December travel period, the U.S., Ecuador, Brazil, and Spain experienced a slight year-over-year increase in the number of direct routes to Central America. Other countries experienced small declines, while Argentina's and Peru's number of direct routes remained unchanged.

Data Source: Amadeus Navigator360, Data as of August 16, 2024



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Subregion Overview:

# Caribbean



## Caribbean Spotlight

Traveler interest in the Caribbean remains robust, with the Dominican Republic ranking as the most searched destination from September to December. Puerto Rico follows closely, seeing 22% year-over-year growth and rising to the second spot. Curaçao has demonstrated the highest year-over-year increase in travel demand at 30%, gaining traction among tourists and benefiting from a strong development of connectivity to South America. Curaçao is becoming a very popular destination for South American travelers.

When looking at cities with the highest year-over-year growth in travel interest among the top 30 searched, Bonaire Island and La Romana stand out as the fastest-growing Caribbean destinations, largely due to improved connectivity.

Punta Cana is the most popular destination based on search popularity and bookings in the subregion. San Juan in Puerto Rico and Montego Bay in Jamaica also play a significant role in driving travel demand. However, these two destinations swap rankings when it comes to bookings through travel agencies.

Between September and December 2024, the highest search volumes for the Caribbean come from travelers in the U.S., Argentina, and the UK. South America is becoming an increasingly important source market for the Caribbean. Argentina ranks second with moderate year-over-year search growth, while Brazil and Colombia each show a growth rate of over 20% each year.











The U.S. holds a significant 61% market share to the Caribbean, followed by Canada with a 9% share, highlighting North America's importance in Caribbean air capacity. Meanwhile, Europe exhibits only a minor share.

An analysis of direct flights to the Caribbean between September and December 2024 indicated a modest overall decline compared to 2023. The number of routes originating from Panama and France experienced a slight increase, whereas the number of direct routes from Germany remained constant.

## Air Searches and GDS Air Bookings to the Caribbean

### Top 10 Searched Destinations











Including Year-over-Year Volume Growth Achievement, Sep – Dec 2024 vs. 2023

	YOY Growth	2024 Rank	2023 Rank
 Dominican Republic	20%	1	1
 Puerto Rico	22%	2	4
 Jamaica	9%	3	3
 Cuba	-26%	4	2
 Aruba	24%	5	5
 Bahamas	13%	6	6
 Curaçao	30%	7	8
 Barbados	-3%	8	7
 St. Lucia	1%	9	10
 U.S. Virgin Islands	1%	10	11

There are only minor changes in the top 10 searched destinations between 2023 and 2024. The Dominican Republic remains the most popular, with a 20% increase in search volume due to affordable flights, and promotion of cultural and natural attractions. Puerto Rico jumps to second place with a 22% growth. Curaçao shows the highest year-over-year growth in travel demand, becoming increasingly popular among travelers.

### Top 10 Searched Cities with the Highest Volume Growth

Calculated Among Top 30 Most Searched Cities Based on Search Volume, Sep – Dec 2024 vs. 2023

	YOY Growth	2024 Rank	2023 Rank
 Bonaire Island, Bonaire Saint Eustatius & Saba	36%	24	47
 City of Curaçao, Curaçao	30%	7	13
 Freeport, Bahamas	28%	29	60
 San Juan, Puerto Rico	26%	2	3
 Aruba Island, Aruba	24%	5	8
 La Romana, Dominican Republic	24%	25	49
 Saint Kitts, Saint Kitts-Nevis	23%	27	55
 Sint Maarten, Sint Maarten	21%	11	22
 Santo Domingo, Dominican Republic	21%	4	6
 Santiago de Los Caballeros, Dominican Republic	21%	18	34

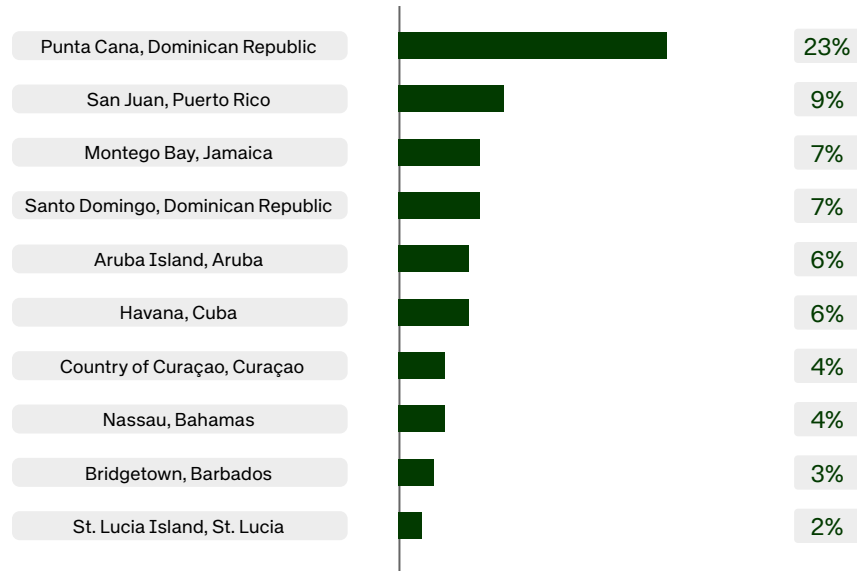
Examining the top 10 cities with the highest search volume growth from among the top 30 most searched destinations reveals that many of these rapidly growing cities are not located in countries within the top 10 ranking. Bonaire Island and Curaçao are climbing the ranks and experiencing significant year-over-year growth for the analyzed period.



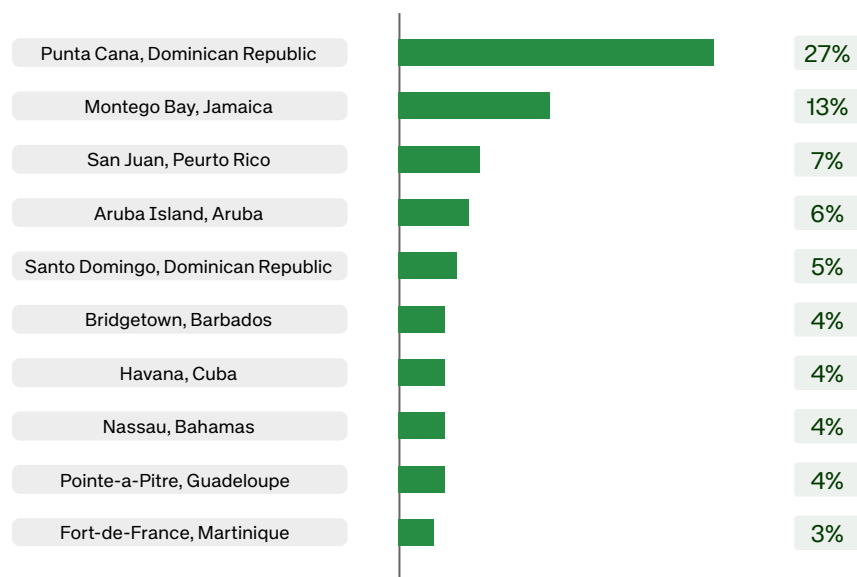
### Top 10 Searched and Booked Cities

Sep – Dec 2024

#### Top 10 Searched Destination Cities



#### Top 10 Booked Destination Cities



Punta Cana tops the charts for searches and bookings, with Montego Bay second in bookings and third in searches. This trend emphasizes the enduring attraction of certain Caribbean spots. For destinations like Curaçao and St. Lucia, which are often searched but less booked, boosting visibility through multiple channels is crucial. Improving air routes and collaborating more with tour operators and travel agencies are essential steps.

### Origin Market Focus

#### Top 10 Origin Markets Searching for the Subregion

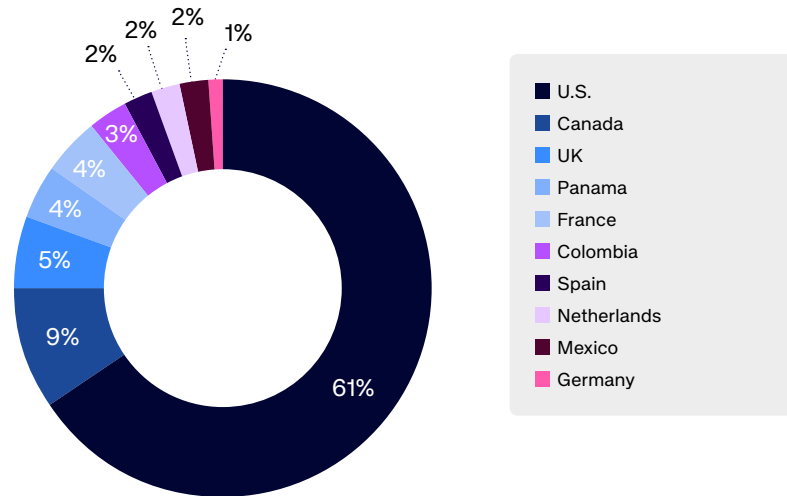
Top 10 Origin Markets Searching for the Subregion, Sep – Dec 2024 vs. 2023

Country	YOY Growth	2024 Rank	2023 Rank
U.S.	24%	1	1
Argentina	9%	2	3
UK	-14%	3	2
Canada	9%	4	4
France	1%	5	5
Brazil	21%	6	7
Germany	-8%	7	6
Colombia	28%	8	10
Spain	-11%	9	8
Italy	20%	10	11

While the U.S. remains at the top of the ranking, South America is increasingly significant for the Caribbean as a source market for the analyzed period. Argentina holds the second spot, and Brazil and Colombia exhibit year-on-year growth exceeding 20%. Italy has entered the top 10 with a 20% year-on-year increase, demonstrating growth in contrast to other European origin markets.

### Available Seats to Caribbean by Origin Market

Sep – Dec 2024



The U.S. holds a strong 61% market share due to significant air connectivity to the Caribbean, highlighting its role in searches and bookings. Canada follows with a 9% share of available seats, underscoring North America's importance in Caribbean air travel.

### Number of Direct Routes to the Caribbean

Sep – Dec 2024 vs. 2023

	2024	Variance	2023
U.S.	454	↓	456
Canada	168	↓	195
UK	18	=	18
Panama	17	↑	16
France	15	↑	13
Colombia	25	↓	39
Spain	16	↓	18
Netherlands	8	↓	9
Mexico	17	↓	30
Germany	16	=	16

The overall number of direct routes to the Caribbean decreased slightly compared to 2023 for the analyzed period. Routes from Panama and France saw a small increase, while the number of direct routes from Germany stayed unchanged.

Data Source: Amadeus Navigator360, Data as of August 16, 2024



2024

Subregion Overview:

# South America



## South America Spotlight

Traveler interest in South America is strong. Brazil remains the top travel destination in South America, with a notable year-over-year search volume growth of over 20% from Colombia, Peru, and Chile for the analyzed period.

Florianopolis tops the list of cities with the highest year-over-year travel interest, showing an 87% increase. Cusco follows with a 42% rise, with notable growth seen in both primary and secondary cities.

Buenos Aires is the leading destination in terms of search popularity and bookings within the subregion, while two major Brazilian cities, Sao Paulo and Rio de Janeiro significantly contribute to travel demand. Rio de Janeiro and Lima, Peru lead in travel agency bookings.

For the travel period between September and December 2024, travelers from the U.S., Brazil, and Argentina topped the search volumes for South America. Argentina moved up one spot in the rankings, entering the top 3 with a robust year-over-year growth of 46%.











In South America, air capacity relies more heavily on strong inter-regional connections than ties to the U.S., which constitutes only 18% of the total capacity. Brazil represents 12% of this capacity, while both Chile and Argentina each make up 10%.

An analysis of direct routes to South America from September to December 2024 showed a noticeable positive trend. The number of routes has increased in most destinations and has risen significantly in countries such as Brazil, Chile, Argentina, Peru, and Colombia.

## Air Searches and GDS Air Bookings to South America

### Top 10 Searched Destinations











Including Year-over-Year Volume Growth Achievement, Sep – Dec 2024 vs. 2023

	YOY Growth	2024 Rank	2023 Rank
 Brazil	11%	1	1
 Argentina	1%	2	2
 Colombia	27%	3	3
 Peru	24%	4	4
 Chile	29%	5	5
 Ecuador	-19%	6	6
 Uruguay	-13%	7	7
 Bolivia	-2%	8	8
 Paraguay	-8%	9	9
 Guayana	2%	10	10

There are only minor changes in the top 10 searched destinations between 2023 and 2024. The Dominican Republic remains the most popular, with a 20% increase in search volume due to affordable flights, and promotion of cultural and natural attractions. Puerto Rico jumps to second place with a 22% growth. Curaçao shows the highest year-over-year growth in travel demand, becoming increasingly popular among travelers.

### Top 10 Searched Cities with the Highest Volume Growth

Calculated Among Top 30 Most Searched Cities Based on Search Volume, Sep – Dec 2024 vs. 2023

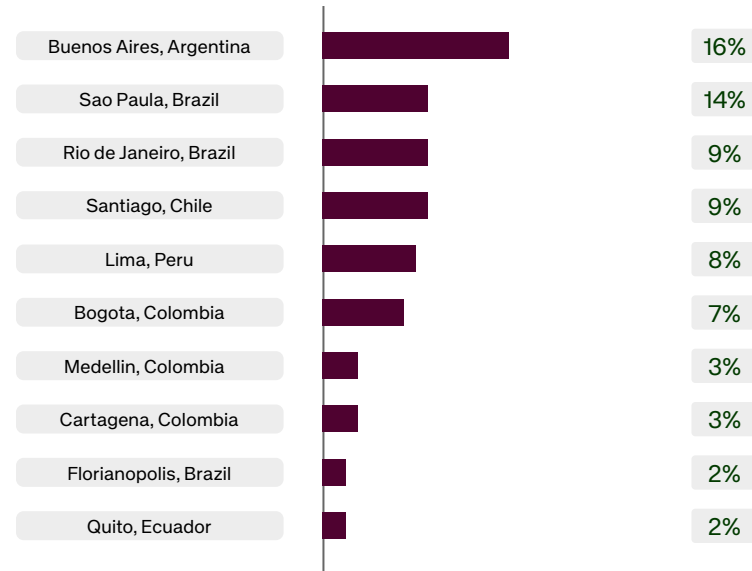
	YOY Growth	2024 Rank	2023 Rank
 Florianopolis, Brazil	87%	9	17
 Cusco, Peru	42%	13	20
 San Andres, Colombia	40%	19	24
 San Carlos de Bariloche, Argentina	35%	22	27
 Medellin, Colombia	34%	7	8
 Santiago, Chile	31%	4	5
 Cali, Colombia	30%	12	14
 Bogota, Colombia	25%	6	6
 Lima, Peru	23%	5	5
 Rio de Janeiro, Brazil	20%	3	4

Among the top 10 cities with the highest search volume spikes, Florianopolis leads with an 87% growth year-over-year. Cusco, a key travel destination, follows with a 42% increase, signaling Peru's comeback noted in the Americas overview. Both San Andres and San Carlos de Bariloche also show significant year-over-year growth, each climbing 5 spots compared to 2023. Overall, there's notable growth at both the primary city level and among secondary cities.

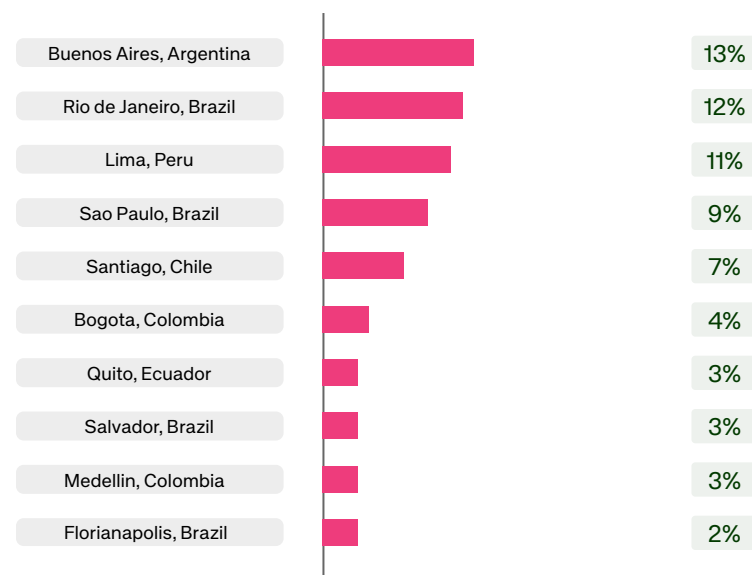
### Top 10 Searched and Booked Cities

Sep – Dec 2024

#### Top 10 Searched Destination Cities



#### Top 10 Booked Destination Cities



Buenos Aires is experiencing a notable surge in searches and GDS bookings and emerging as the leading destination in South America for the analyzed period. Other favored destinations in the region, namely Sao Paulo, Rio de Janeiro, and Santiago, maintain a stable positioning, reflecting consistent popularity among travelers.

The noteworthy shift in Buenos Aires' prominence highlights a clear trend in traveler preferences, emphasizing the city's growing appeal. These insights into the shifting dynamics of booked destinations provide valuable information for stakeholders in the travel industry to align their offerings with the evolving preferences of travelers.

### Origin Market Focus

#### Top 10 Origin Markets Searching for the Subregion

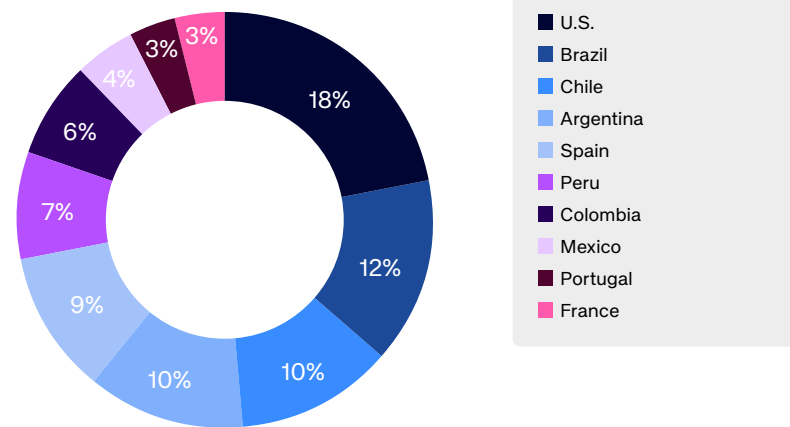
Sep – Dec 2024

Country	YOY Growth	2024 Rank	2023 Rank
U.S.	15%	1	1
Brazil	8%	2	2
Argentina	46%	3	4
Spain	-2%	4	3
Chile	56%	5	10
Mexico	32%	6	11
Italy	1%	7	5
UK	2%	8	7
Germany	-6%	9	6
Portugal	3%	10	8

The U.S. leads in searches for South American trips during fall and winter. Argentina and Chile saw impressive growth from 2023 to 2024, showing high outbound travel demand. Mexico, with double-digit growth, is a rising origin market. European origin markets lack year-over-year growth. These trends suggest that stakeholders might consider new markets like Mexico for their marketing initiatives.

### Available Seats to South America by Origin Market

Sep – Dec 2024



Air capacity in South America is more dependent on robust inter-regional connections than on links to the U.S., which accounts for 18% of the capacity. Meanwhile, Brazil holds a 12% share, and Chile and Argentina each account for 10%. Prioritizing inter-regional connectivity is crucial.

### Number of Direct Routes to South America

Sep – Dec 2024 vs. 2023

	2024	Variance	2023
U.S.	123	↑	122
Brazil	86	↑	80
Chile	56	↑	47
Argentina	75	↑	66
Spain	46	↑	41
Peru	42	↑	36
Colombia	44	↑	37
Mexico	27	↓	32
Portugal	16	↑	15
France	13	↑	12

Regarding the availability of direct routes to South America during the travel period of September to December, there is a noticeable positive trend. The number of these routes has increased in most destinations and has risen significantly in countries such as Brazil, Chile, Argentina, Peru, and Colombia, underscoring the growth in interregional connectivity.

Data Source: Amadeus Navigator360, Data as of August 16, 2024



## Methodology and Data Sources

Data included in this report was extracted from Amadeus Navigator360, including following data sets: Amadeus Air Search, Amadeus Air Booking, and Amadeus Schedule as of August 16, 2024.

### Amadeus Air Searches:

Amadeus Air Search data provides a unique view of over 200M true searches per day from over 2,500 global OTAs (including the top 10 worldwide OTAs), and the world's best known global travel websites. Available at a daily granular level, refreshed weekly and included 12 months of historical and forward-looking data. Bot and split queries are removed to provide the most accurate and actionable search data.

### Amadeus Air Bookings:

Amadeus Air Booking data sourced from the 3 major Global Distribution Systems (GDSs) provides unparalleled depth with details on bookings by origin and destination, cabin class, business versus leisure and travel agency profile.

### Amadeus Air Schedules:

Amadeus Schedule Analytics offers data from over 900 scheduled flights. Airline schedules can be viewed in terms of number of flights or number of seats. This data is both historical and forward-looking, with access to schedules up to 12 months into the future. This allows destinations to monitor the recovery of capacity and identify new markets opening up with scheduled flights.

Amadeus Navigator360™ is the most comprehensive collection of air, hotel and sociodemographic data available today for organizations and businesses impacted by evolving travel trends.





## Acknowledgements

### About UN Tourism

UN Tourism is the United Nations specialized agency for fostering tourism as a vehicle for equal, inclusive and sustainable development. Working with its Member States, international organizations and the private sector, UN Tourism promotes safe and seamless travel for all. UN Tourism also works to make tourism the foundation of trust, and international cooperation, as well as a central pillar of growth and opportunity. UN Tourism is at the forefront of global efforts to achieve the 2030 Agenda for Sustainable Development through its ability to create decent jobs, promote equality and preserve natural and cultural heritage.

To find out more about UN Tourism, visit [unwto.org](http://unwto.org)

### About Amadeus

Amadeus powers more personalized and authentic travel experiences. Our solutions are designed to enrich every stage of the traveler's journey and help hospitality providers acquire, service, and retain guests by profitably driving demand and converting them into loyal fans. Backed by over 30 years of experience, we design open, cutting-edge software to provide the most efficient, trusted, and reliable systems for our customers. With experts in 175+ countries, we have a deep understanding of the hospitality industry and a desire to enable our hotel partners to create memorable guest experiences.

To find out more about Amadeus, visit [amadeus-hospitality.com](http://amadeus-hospitality.com).

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