

AMADEUS' DESTINATION INSIGHTS

Caribbean Travel Trends 2025

May 2025

amadeus



CARIBBEAN
HOTEL & TOURISM
ASSOCIATION

CARIBBEAN TRAVEL TRENDS 2025

amadeus



The data included in this document is accurate according to Amadeus' (formerly ForwardKeys) market research database as of April 2025.

© Amadeus IT Group and its affiliates and subsidiaries, 2025.

Foreword

As global tourism competition intensifies in 2025, Caribbean destinations, heavily reliant on this vital sector, face a pivotal year. The region's ability to remain competitive and thrive in the year ahead will significantly depend on implementing smart strategies, particularly in enhancing air connectivity and deploying highly targeted marketing campaigns.

In an era of abundant choice for travellers, understanding market shifts, anticipating demand, and identifying the right visitor segments are no longer optional – they are fundamental to achieving sustainable growth and maintaining a competitive edge. Harnessing data provides the clarity needed to make informed decisions, allocate resources effectively, and tailor offerings to meet evolving traveller expectations.

To support this, Amadeus' (formerly ForwardKeys) and the Caribbean Hotel and Tourism Association (CHTA) present this third collaborative report. Packed with forward-looking insights derived from air travel and hospitality data, it focuses on tangible business opportunities and best practices, empowering stakeholders with crucial intelligence for the coming year ahead.

Our shared focus on actionable intelligence aligns with CHTA's mission – to enable Caribbean stakeholders to share knowledge and grow stronger together. Using these insights, we can refine strategies and work towards a prosperous and resilient 2025 for Caribbean tourism.



Olivier Ponti
Director - Intelligence & Marketing
Amadeus (formerly ForwardKeys)



Sanovnik Destang
President,
The Caribbean Hotel & Tourism Association



About this report

amADEUS

About Amadeus (formerly ForwardKeys)

Amadeus (formerly ForwardKeys) is trusted by organisations worldwide to deliver actionable insights through superior travel data and product innovation. As a global leader in travel intelligence, we deliver real-time and predictive analysis of airports, airlines and annual passengers, helping destinations and businesses better understand and anticipate traveller behaviour.

Our proprietary algorithms, powered by advanced AI and machine learning, process millions of data points daily, offering unmatched granularity to inform strategic decisions in marketing, operations, and growth. Destinations and businesses can gain hyper-targeted information about geographic areas, enabling more effective marketing, store placements, and strategic planning.

By leveraging detailed travel behaviour data across nationalities, routes, regions, and seasonality, Amadeus (formerly ForwardKeys) helps businesses focus their strategies, giving them a competitive edge and maximising growth opportunities.



About the Caribbean Hotel and Tourism Association (CHTA)

The Caribbean Hotel and Tourism Association (CHTA) is the Caribbean's leading association representing the interests of national hotel and tourism associations. For more than 60 years, CHTA has been the backbone of the Caribbean hospitality industry. Working with some 1,000 hotel and allied members, and 32 National Hotel Associations, CHTA is shaping the Caribbean's future and helping members to grow their businesses. Whether helping to navigate critical issues in sales and marketing, sustainability, legislative issues, emerging technologies, climate change, data and intelligence or, looking for avenues and ideas to better market and manage businesses, CHTA is helping members on issues which matter most.

Methodology

Data used in this report

The insights on Travel Intent and Air Connectivity in this report were compiled from Amadeus' (formerly ForwardKeys) data Smarts, whilst the Social Demographic Profiles and Traveller Spend data are sourced from Amadeus Navigator360™. Together, this data provides segmented global air travel monitoring for historical and forward-looking tourist arrivals.

Travel intent

Table of contents

01 Travel intent	7
Dominican Republic and Puerto Rico top of mind in travel searches	8
Latin America leads annual growth in Caribbean travel interest	9
02 Seasonality	11
Canadian summer demand presents low-season opportunity	12
03 Traveller profiles	15
Curaçao and Cayman Islands segment visitors via targeted offerings	16
Contrasts in traveller spending reflect market positioning	18
04 Connectivity	19
Aligning supply and demand could unlock growth potential	20
05 Lead times	22
Market-specific search horizons inform promotional strategy	23
06 Event impact	24
Cultural and traveller spending events boost Caribbean travel intent	25

01

Dominican Republic and Puerto Rico top of mind in travel searches

Flight search data for July-September 2025 reveals a stable picture for travel intent to the Caribbean, currently tracking search volumes seen in the same period in 2024. However, at a more granular level, we see certain destinations significantly outperforming the year-over-year average.

The Dominican Republic leads the region in terms of overall search volume, with a 31.9% share of all flight searches for summer travel to the Caribbean this year. Year-over-year growth in search intent of +7% indicates increasing appeal, likely bolstered by its diverse tourism offerings and extensive accommodation options.

Puerto Rico, while attracting a lower overall share of searches (16.6%), is showing impressive growth in traveller interest over last year, with a +44% surge compared to the equivalent period in 2024. This predicts exceptionally strong demand and standout performance for the upcoming season – likely supported by popular interest in the “Bad Bunny” artist residency taking place July–September as discussed in greater detail later in this report.

Overseas flight searches made for travel between Jul-Sep 2025

Destination*	Searches (% Share)	Var vs 2024
Puerto Rico	16.6%	+44%
Sint Maarten	2.8%	+22%
Dominican Republic	31.9%	+7%
Saint Lucia	2.2%	+2%
Curaçao	4.9%	+2%

*considering destinations that represent more than 0.5% share



Other destinations are also significantly outperforming the regional average growth rate. Sint Maarten stands out with a +22% increase in search volume (capturing a 2.8% share), reflecting considerable growing interest among potential travellers. Curaçao (4.9% share) and Saint Lucia (2.2% share) also display positive trends relative to the regional benchmark, both registering a +2% year-over-year uptick in searches.

This granular analysis is important in demonstrating that while regional trends remain stable, the performance of individual destinations can vary significantly, and underlines the importance of access to forward-looking data to enable DMOs to adapt their marketing and outreach campaigns, boost their visibility and capitalise on broader interest in the region.

Latin America leads annual growth in Caribbean travel interest

Looking at the origin markets with the greatest proportion of flight searches for travel to the Caribbean between July and September 2025 reveals the growing importance of Latin American travellers to tourism in the region.

Mexico stands out as the top-performing origin market in terms of year-over-year growth, with flight searches for Caribbean destinations more than doubling, followed closely by Colombia and Brazil, each showing increases in travel intent of around a third. Canada, a traditionally strong source market, also displays healthy growth, with searches up +22% year-over-year, accounting for a significant 7.1% share of total searches. Spain too emerges as a key long-haul market, with a +21% increase in search volume resulting in a 4.2% share of traveller interest overall.

The dynamic growth emanating from Latin America presents a significant opportunity for Caribbean destinations. For DMOs, this suggests that market-specific campaigns targeting major hubs in these markets with connectivity into the Caribbean will be invaluable in driving visitor numbers and ensuring a successful summer season in 2025.

Overseas flight searches made for travel between Jul-Sep 2025

Origin Market*	Searches (% Share)	Var vs 2024
Mexico	2.4%	+107%
Colombia	3.3%	+37%
Brazil	2.8%	+30%
Canada	7.1%	+22%
Spain	4.2%	+21%

*considering origin markets that represent more than 1.25% share

GET IN TOUCH TO LEARN MORE ABOUT OUR CONSULTING SERVICES

[CONTACT US](#)

Seasonality



Know exactly who's visiting, when and for how long

DMOs have evolved — and destination marketing is now only a part of the equation. Balancing the needs of tourists versus locals requires a detailed understanding of the economic, social and environmental impact of inbound travel.

With Amadeus (formerly ForwardKeys) you'll gain access to the comprehensive data you need to understand traveller behaviour at a granular level — past, present and future.

[LEARN MORE](#)

ForwardKeys solutions for DMOs



Destination Gateway

A revolutionary app for DMOs!

Rapid, actionable insights via advanced analytics dashboards. Comprehensive data visualisation for everyone in your organisation.



ForwardKeys Connect

Our data — your way!

Stay ahead of industry trends and boost ROI — with no-code access to the most comprehensive, granular and up-to-date global travel data in the industry.



ForwardKeys Smarts

Transform the way you work with data

Data Smarts are curated and processed datasets, enriched with advanced data science — allowing you to answer key business questions across a range of use cases. Get direct access to our library via our Connect DaaS platform and other delivery methods.



ForwardKeys Nexus

Our most advanced BI solution

A fully-featured real-time BI application with a focus on datasets — allowing you to navigate our data and extract any piece of information contained within.

02

Canadian summer demand presents low-season opportunity

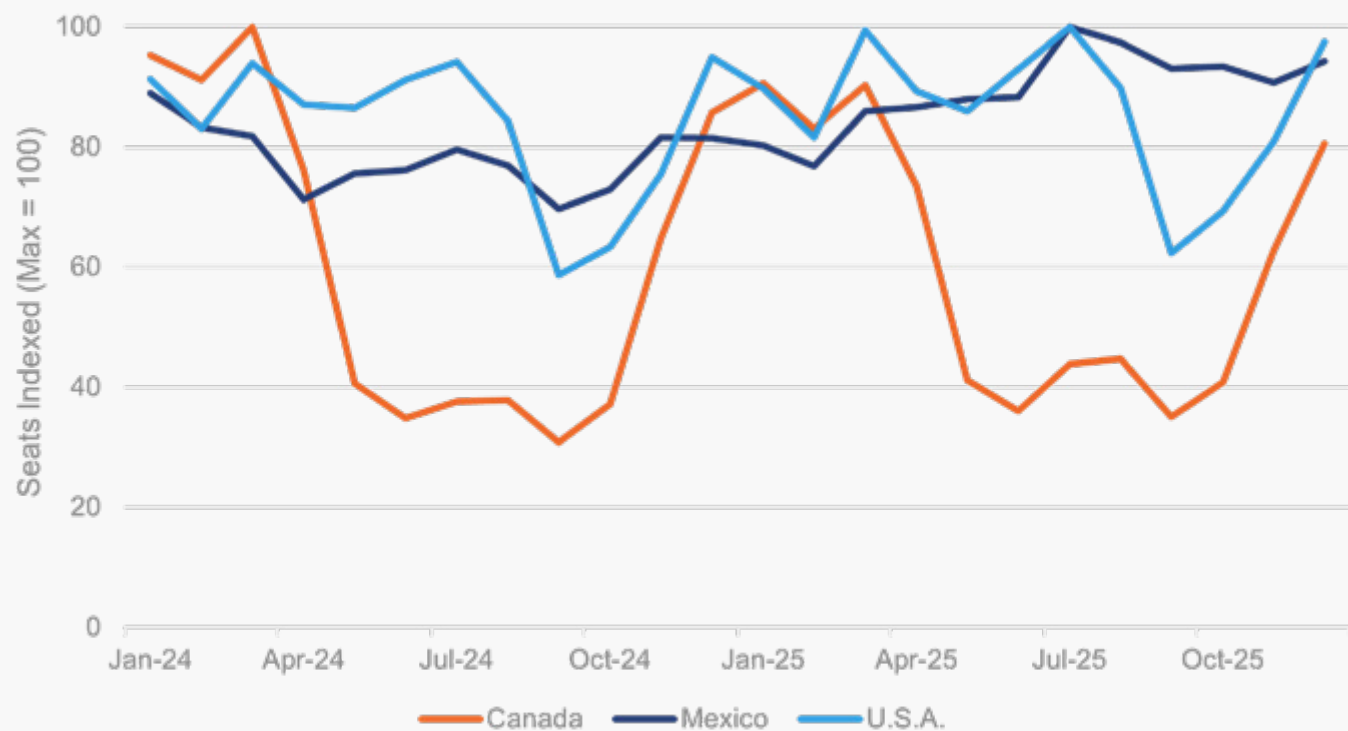
Canadian air connectivity to the Caribbean currently follows a pronounced seasonal pattern, with available seats typically decreasing during the low season spanning from May through October. However, this period coincides with the northern hemisphere's summer vacation period, presenting a strategic window for Caribbean destinations to attract more Canadian visitors.

Encouragingly, travel intent from Canada shows robust growth during this window. Flight searches from Canada for travel in Q3 2025 (July-September) are up 22% year-over-year, driven by major urban centres like Montreal, which shows a 62% surge in searches. Airlines appear to be recognising this opportunity, with seat capacity from Canada to the Caribbean in summer 2025 forecast to be +16% higher than in 2024, although this increase still lags behind the growth in travel intent (+22%), suggesting potential unmet demand.

The connectivity gap is further highlighted by strong search growth from Canada towards destinations currently lacking direct flights during this period, such as the US Virgin Islands (+193%) and British Virgin Islands (+124%), as well as destinations like Puerto Rico (+121%) and Saint Kitts & Nevis (+92%), which receive direct Canadian flights in peak season but not during the summer, show significant demand.

Currently, the lack of direct summer flights forces the majority of Canadian travellers heading to the Caribbean in Q3 to transit via the U.S., with Atlanta serving as the primary hub. This reliance on connections adds complexity and potential cost, and reveals a clear opportunity for airlines and DMOs to collaborate on adding or extending direct flight schedules further into the summer low season.

Forecasted Seat Capacity for overseas flights arriving to the Caribbean in 2024 and 2025



Source: Amadeus (formerly ForwardKeys) Air Supply

Flight Searches made for travel between July and September 2025 from Canada to the Caribbean; var vs 2024

Destination*	Searches	Var vs 2024	Direct Connectivity
US Virgin Islands	1.2%	+193%	✗
British Virgin Islands	1.4%	+124%	✗
Puerto Rico	5.4%	+121%	✗
Saint Kitts and Nevis	1.5%	+92%	✗
Haiti	1.6%	+70%	✓
Bermuda	2.7%	+66%	✓
Cayman Islands	2.8%	+51%	✓
Saint Lucia	3.8%	+44%	✓
Saint Vincent and the Grenadines	2.2%	+41%	✓
Antigua and Barbuda	2.3%	+37%	✓

✗ No direct connections during the low-season, however airlines do operate at other times in the year

Source: ForwardKeys Flight Searches and Air Supply

DISCOVER GROWTH OPPORTUNITIES FOR LOW SEASONS

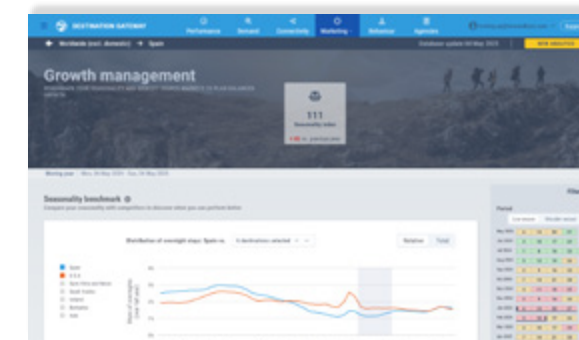
Destination Gateway is Amadeus' (formerly ForwardKeys) latest innovation. Built specifically for DMOs and tourist boards, this powerful yet intuitive solution provides destination clients with travel data at each step of the consumer journey in near-real time.

NEW GROWTH MANAGEMENT MODULE

- Be smarter than the competition Benchmark your seasonality index and use your competitive set to identify demand.
- Be informed about your growth potential Highlights the size of each market to establish growth during low-seasons.
- Build resilience Identify potential new source markets for a more resilient market mix.



Amadeus' (formerly ForwardKeys) Data Solution for DMOs





Strategic and tactical decision making made easy for destinations

Destination Gateway is Amadeus' (formerly ForwardKeys) latest innovation. Built specifically for DMOs and tourist boards, this powerful yet intuitive solution provides destination clients with travel data at each step of the consumer journey in near-real time.

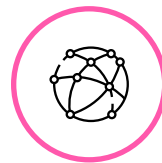
Destination Gateway comprises:



Performance
Understand the performance of your destination regarding specific travel audiences – including historical trends, current patterns and outlook.



Demand
Chart the intention to travel by using flight searches. Monitor the impact of your campaigns or other events impacting travel and understand per market which travel periods are in high demand.



Connectivity
Power up your decision-making and negotiations with airlines by studying air capacity and supply to your destination, with a load factors feature displaying the proportion of seats taken up on individual routes to a destination.



Market planning
Understand your source markets' travel behaviour and profiles to optimally prepare your marketing plans and campaigns. Focus your analysis on your key markets or your key events.



Growth Management
This module uses prescriptive analytics to highlight your growth potential per source market during your low season.



Behaviour
Provides key insights into visitors' behaviour at a destination using geolocation data, including visitor dispersion, activity popularity, dwell time and visitor residence.

AMADEUS' DATA SOLUTION FOR DMOS

[LEARN MORE](#)

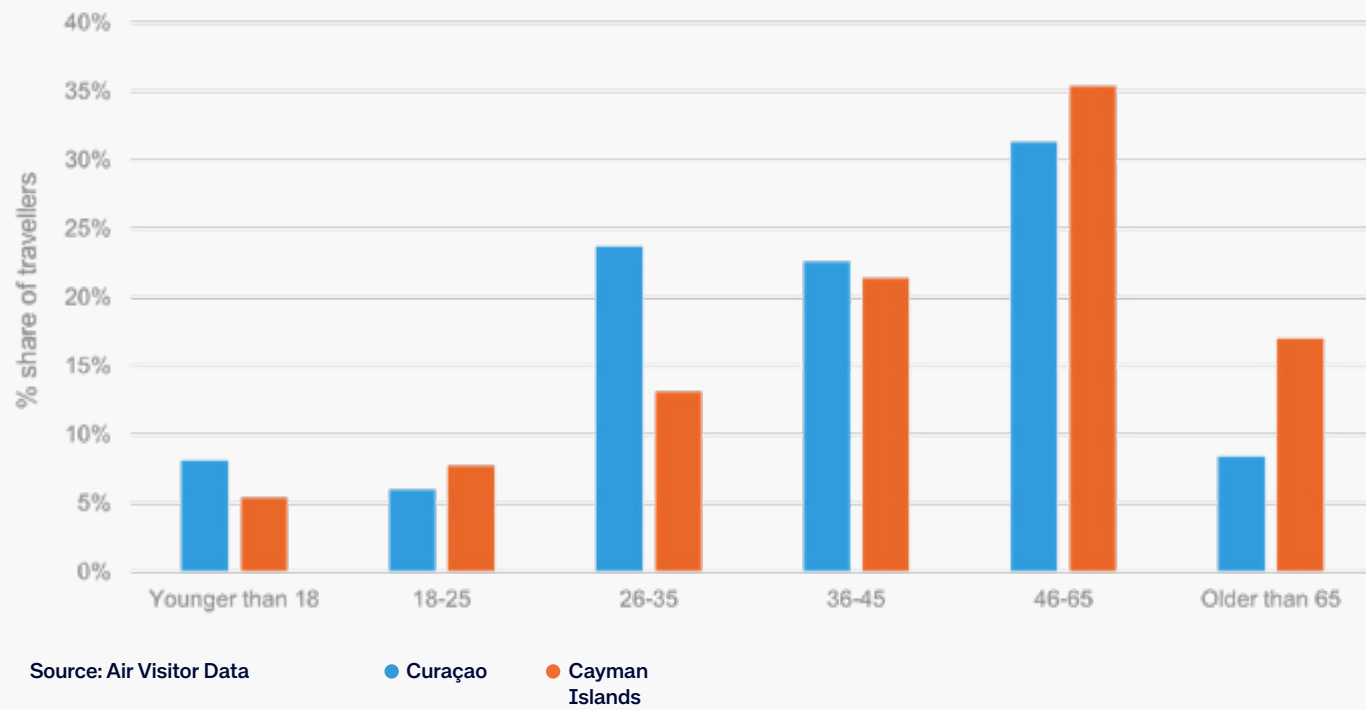


Traveller profiles

03

Curaçao and Cayman Islands segment visitors via targeted offerings

Tourist Arrivals to Caribbean destinations in May 2025



Caribbean destinations are increasingly successful at attracting distinct traveller demographics by tailoring their offerings and programs to specific lifestyle preferences and needs to cultivate unique market niches. Focusing on two destinations in particular – Curaçao and the Cayman Islands – highlights the impact of specialised government initiatives as a tool to target specific types of travellers.

Curaçao has effectively positioned itself as a magnet for younger professionals and families. Data reveals a significant concentration of visitors in the 26-35 age group (23.7%), drawn by the island’s relatively affordable cost of living, vibrant local culture, and appealing work-life balance.

It appears that the “@Home in Curaçao” digital nomad program has been a driver of this trend, simplifying residency for remote workers, but Curaçao’s family-friendly appeal is also evident, with children (8.1% share) and the 36-45 age bracket (22.6% share) making up a substantial portion of arrivals.

By contrast, the Cayman Islands cater primarily to older, more affluent visitors. A strong influx of visitors in the higher-earning

46-65 age range (35.4%) reflects the islands’ reputation for luxury, exclusivity, and a high standard of living.

The “Global Citizen Concierge Program”, which facilitates long-term stays for high-net-worth individuals and remote professionals, plus the islands’ world-class amenities, fine dining, pristine beaches, and robust financial services sector, all increase its appeal to this wealthier demographic.

Armed with the right data, destinations elsewhere in the Caribbean can leverage similar demographic insights and analysis of traveller motivations to effectively segment audiences, tailor marketing efforts and incentives, to strategically attract their desired mix of visitors.

Caribbean destinations are increasingly successful at attracting distinct traveller demographics by tailoring their offerings and programs to specific lifestyle preferences and needs to cultivate unique market niches



Contrasts in traveller spending reflect market positioning

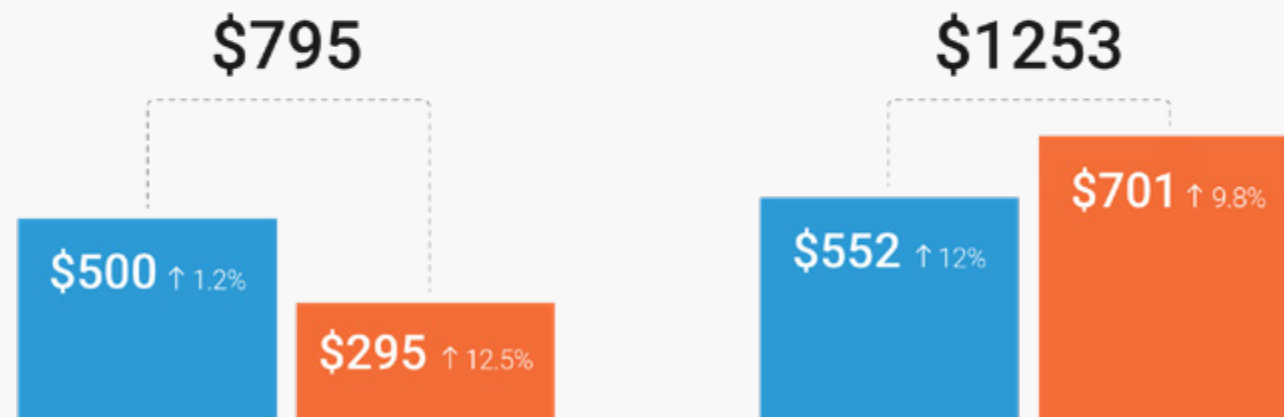
Travel Spending to Caribbean destinations in Apr 2025

Curaçao

Global travel spending is **+5.1%** higher than last year

Cayman Islands

Global travel spending is **+10.8%** higher than last year



Source: Air Bookings & Hotel Bookings Data

● Flight ● Hotel

Analysis of traveller spending patterns in April 2025 in Curaçao and the Cayman Islands provides valuable insights into the two destinations' distinct market positioning and appeal.

Curaçao presents a more accessible price point for travellers, with average combined spend on flights and hotels at approximately US\$795. However, while flight costs saw a modest increase of 1.2% year-over-year, average hotel costs rose significantly by 12.5%.

This substantial increase in hotel rates, despite remaining considerably lower than the Cayman Islands, suggests strong demand and growing popularity, allowing accommodation providers to raise prices, a positive indicator for Curaçao's tourism health. This is supported by overall global travel spending in Curaçao, showing a 5.1% increase year-over-year.

In contrast, in the Cayman Islands average spend on flights and accommodation reached US\$1253, with accommodation representing over 50% of the total, compared to around a third in Curaçao. Both components saw significant year-over-year increases, with flight costs up +12% and hotel costs up +9.8%.

While flight costs to the two destinations are comparable, the considerably higher average hotel price (US\$701 vs. US\$250) clearly differentiates the Cayman Islands, reflecting its appeal to more affluent travellers seeking premium experiences. This focus is reflected in the strong overall growth in global travel spending within the destination, up +10.8% year-over-year.

It's a reminder to destinations that differing price structures, particularly in accommodation, can effectively support targeted market strategies focused on attracting a specific mix of visitor demographics.

Connectivity

04

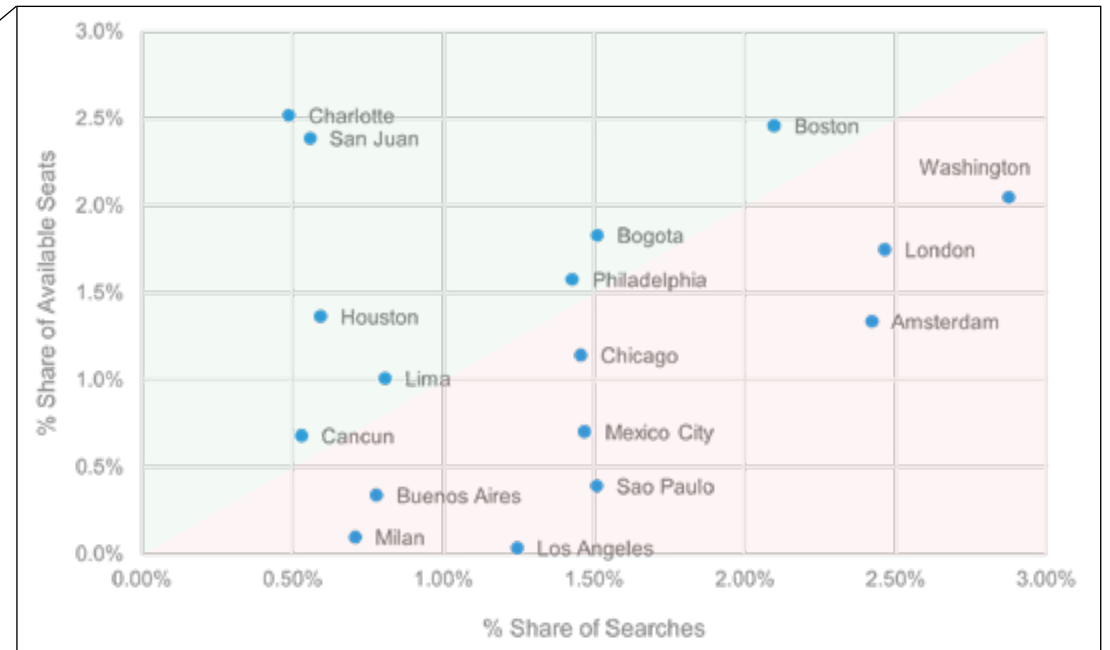
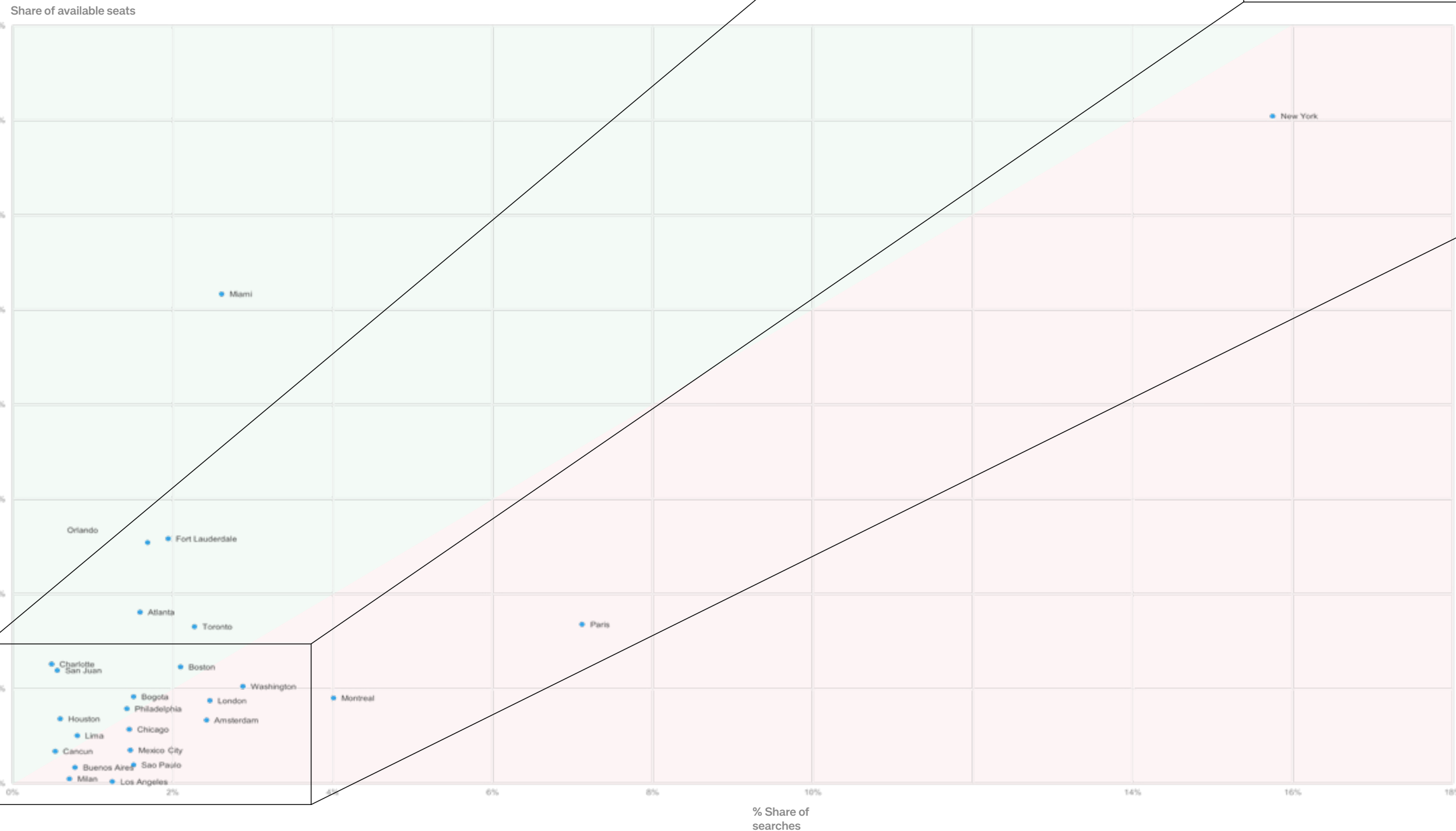
Aligning supply and demand could unlock growth potential

Optimising air connectivity is fundamental to fuelling tourism growth, requiring a strategic alignment between available seat capacity (supply) and traveller search interest (demand). By analysing the relationship between the share of available seats and the share of flight searches for travel to the Caribbean in Q3 2025 (July-September), destinations can identify distinct opportunities to increase tourist arrivals. Our analysis reveals two key categories of interest — ‘underused’ and ‘underserved’ routes.

‘Underused routes’ are characterised by having a higher proportion of available airline seats compared to their share of flight searches. This suggests that while ample connectivity exists, traveller intent hasn’t yet grown to match the available supply. Key examples of markets falling into this category include Boston, Philadelphia, and Tampa. Major US hubs like

Overseas seat capacity and searches made for travel between July and September to the Caribbean

Underused Underserved



Source: Amadeus (formerly ForwardKeys) Flight Searches & Air Supply

Miami, Orlando, Fort Lauderdale, Charlotte, Atlanta, and Dallas also show strong connectivity to the region.

For Caribbean destinations, these routes represent immediate opportunities. Targeted marketing campaigns aimed at travellers in these specific origin cities can stimulate demand and help fill existing capacity, potentially yielding relatively quick results in visitor numbers.

Conversely, ‘underserved routes’ exhibit a lower proportion of available seats relative to their share of flight searches. This indicates that traveller demand from these origins outstrips the current air supply. Prominent examples include high-volume markets like New York, Paris, and Montreal, west-coast US hubs Los Angeles, San Diego and San Francisco and Latin American capitals such as Mexico City and Buenos Aires.

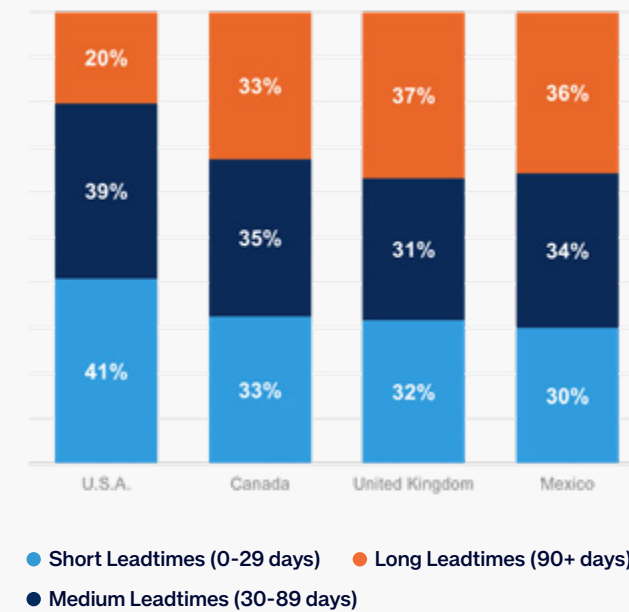
These markets signal a clear opportunity for longer-term growth through route development. Engaging with airlines to establish new direct routes or increase capacity on existing ones from these underserved origins is crucial for capturing unmet demand, unlocking additional tourism potential.

By differentiating between these route types, destinations can tailor their connectivity strategies, implementing short-term marketing pushes for underused routes while pursuing longer-term route development for underserved markets to ensure sustainable growth.

Lead times

Market-specific search horizons inform promotional strategy

Overseas flight searches made for travel to the Caribbean between January and March 2025



Source: Amadeus (formerly ForwardKeys) Flight Searches

Understanding when potential visitors begin searching for flights is crucial for optimising marketing strategies and ensuring messages reach audiences at the optimal point in their decision-making process, and analysis of overseas flight searches for travel to the Caribbean between January and March 2025 reveals distinct trends across key origin markets.

Lead times – the period between a flight search and the intended travel date – vary significantly. The US, the Caribbean's largest source market, displays a notably shorter search horizon compared to other key markets. A significant 41% of US-based searches for Caribbean travel occurred within 30 days of the intended departure date (short lead time), with another 39% falling into the medium lead time category (30-89 days). Only 20% of searches from the US were made 90 days or more in advance (long lead time). This indicates a strong tendency towards shorter-term planning and potentially more spontaneous travel decisions among US travellers.

In contrast, the United Kingdom market demonstrates the longest lead times. Over a third (37%) of UK searches were conducted more than 90 days ahead of the travel period, likely driven by the need to plan and budget for more expensive long-haul, transatlantic flights. Canada and Mexico show more balanced distributions, with roughly a third of searches falling into each category.

These differences in search behaviour have direct implications for DMOs. Campaigns targeting US travellers, for instance, should maintain visibility closer to the desired travel periods, potentially emphasising short-term inspiration, availability, and last-minute offers to capture the significant short-lead-time segment. Conversely, reaching UK travellers requires a much earlier start, ideally launching campaigns 3 to 6 months before peak seasons, focusing on value propositions, unique experiences, and well-planned itineraries that appeal to those investing significant time and resources in planning. For top-performing markets Canada and Mexico which demonstrate an even spread of lead times, a balanced approach, with consistent messaging over time is key to unlocking their significant growth potential.

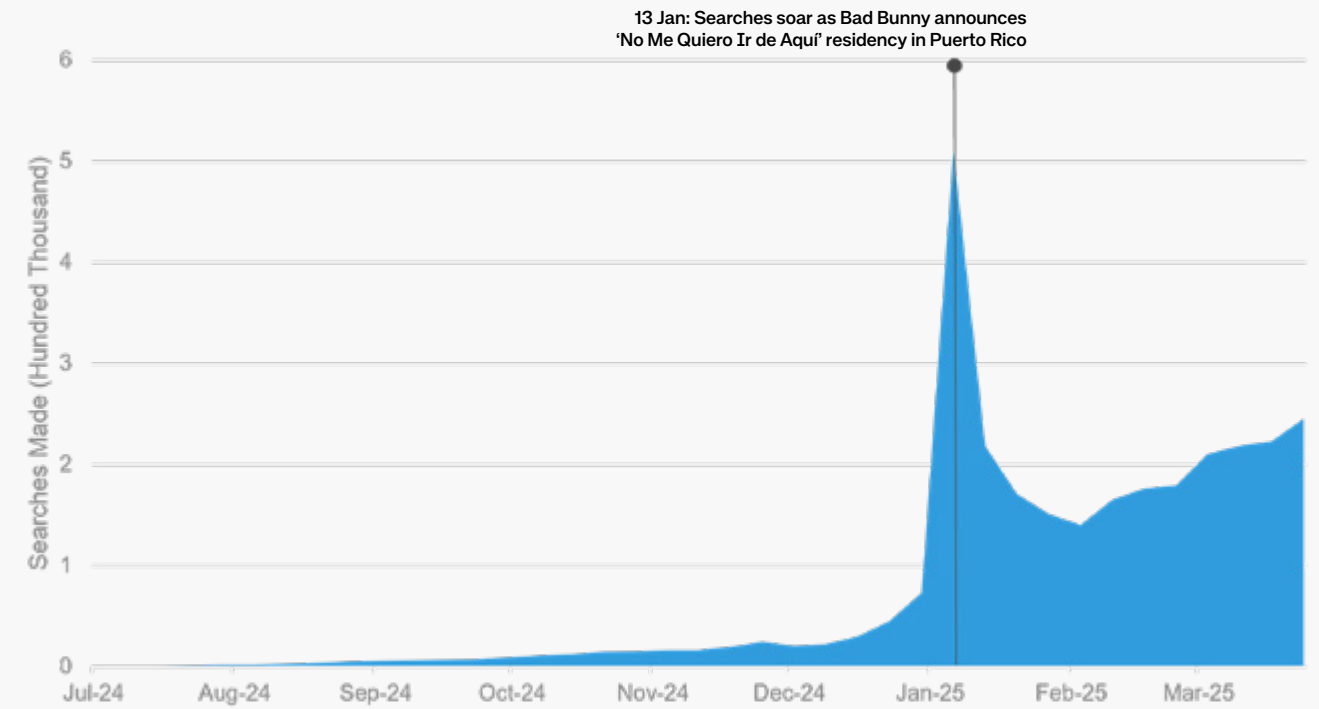
By matching destination offerings – luxury, adventure, or culture – with the typical planning horizons and profiles of different source markets, DMOs can significantly increase the relevance and impact of their promotional activities.



Event impact

Cultural and traveller spending events boost Caribbean travel intent

Overseas Flight Searches made for travel to Puerto Rico between 8 July and 14 September 2025



Source: Amadeus (formerly ForwardKeys) Flight Searches

Events – spanning culture, music, sports, and entertainment – serve as powerful catalysts for tourism, creating urgency, generating significant social buzz, and providing travellers with compelling reasons to book a trip. This translates directly into measurable spikes in travel intent, as demonstrated by recent examples in the Caribbean.

The rise of “concert tourism,” exemplified by recent global tours such as Taylor Swift’s “Eras Tour” sees fans build entire itineraries around performances, and this trend has been replicated within the Caribbean in 2025. When global superstar Bad Bunny announced an exclusive 2025 residency in Puerto Rico (with performances running mid-July to mid-September), the impact on travel searches was immediate.

The rise of “concert tourism,” exemplified by recent global tours sees fans build entire itineraries around performances

In the week following the January 13th announcement, overseas flight searches for travel to Puerto Rico during the residency period surged by a factor of seven compared to the previous week. Specific origin markets saw even more pronounced increases, particularly those with strong cultural connections or proximity, including searches from Los Angeles (25.6x higher)

06

than the previous week), Mexico City (19.9x) and San Diego (16.5x). Notably, search interest remained elevated even after the initial peak, indicating sustained interest.

Sporting events yield similar benefits. Barbados, for example, successfully hosted nine matches of the ICC Men’s T20 World Cup in 2024, including the final. This high-profile event attracted cricket enthusiasts from key overseas markets like the UK, India, and Australia, significantly boosting visitor arrivals and showcasing the island on a global stage. Film and television are also increasingly influential on travel decisions, with the term “set-jetting” being coined to describe the effect of popular series inspiring viewers to visit the locations featured on screen.

It’s a reminder that hosting and promoting major events has significant strategic as well as cultural value – not only in attracting visitors directly attending the event but in enhancing a destination’s overall visibility and appeal, driving substantial increases in travel searches and attracting significant tourist spending to local economies.



Photo by Jeremy Bishop on Unsplash

Overseas Flight Searches made for travel to Puerto Rico between 8 July and 14 September 2025

Origin Markets	Searches Made (w/c 13 Jan)	Variation vs previous week (x times)
Los Angeles	34.5 thousand	25.6x
Mexico City	10.2 thousand	19.9x
San Diego	5.9 thousand	16.5x
San Francisco	12.6 thousand	16.5x
Cancun	4.8 thousand	15.7x
Fort Lauderdale	22.5 thousand	13.5x
Bogota	5.9 thousand	13.1x
San Jose	3.7 thousand	11.0x
Santiago	3.7 thousand	10.8x
Miami	18.3 thousand	10.3x
TOTAL	510 thousand	7.0x

Source: Amadeus (formerly ForwardKeys) Flight Searches

where and when



amadeus

Predicting Travellers' impact

[Contact us](#)

Disclaimer. The content above was previously published by ForwardKeys on its website, as Amadeus acquired ForwardKeys we are now reproducing it on this website for continuity. Amadeus makes no representation regarding the continued accuracy or completeness of the information presented in the content. No content available on this website may be redistributed, repurposed, or used for any commercial activity beyond its availability on this website.