



amadeus

LATAM Travel Outlook 2026: Growth, Shifts and Opportunities

8 June 2026

Olivier Ponti,
Director of Market Intelligence & Insights,
Hospitality, Amadeus

Amadeus. It's how travel works.

Serving customers in

190+
Countries

Partner connections

1300+

Global team of

20,000+
Professionals

GDS Air Bookings per year

470+
million

5th largest R&D investor in the software industry in Europe. We invested in 2024.

€1.3+
billion

Passengers boarded per year

2.2+
billion

6th consecutive year included in the Financial Times list of

Diversity
Leaders

Revenue

€6.1
billion

Amadeus data captures and reflects the entire traveler journey

SUPPLY



© Amadeus IT Group and its affiliates and subsidiaries



Schedules

Seat Capacity



Searching

Flight Searches



Booking



Arriving

Flight Bookings Data + Total Air Market



Staying



Departing



Future

Forward-Looking Capacity

Amadeus data captures and reflects the entire traveler journey



DEMAND



Schedules

Seat Capacity



Searching

Flight Searches



Booking



Arriving

Flight Bookings Data + Total Air Market



Staying



Departing



Future

Forward-Looking Capacity

Amadeus data captures and reflects the entire traveler journey

FUTURE



Schedules

Seat Capacity



Searching

Flight Searches



Booking



Arriving

Flight Bookings Data + Total Air Market



Staying



Departing



Future

Forward-Looking Capacity

Air Connectivity

How airlines are
planning operations
throughout the region



Regional air connectivity in the Americas

Flown and Forecasted Air Supply for international flights between May 2026 and Oct 2026, as of 17 May 2026; % difference year-over-year (YoY)

Next 6 months
**Seat Capacity
 Forecast**

+1% YoY



North America

Next 6 Months: **+0% YoY**

Caribbean

Next 6 Months: **+2% YoY**

Central America

Next 6 Months: **-1% YoY**

South America

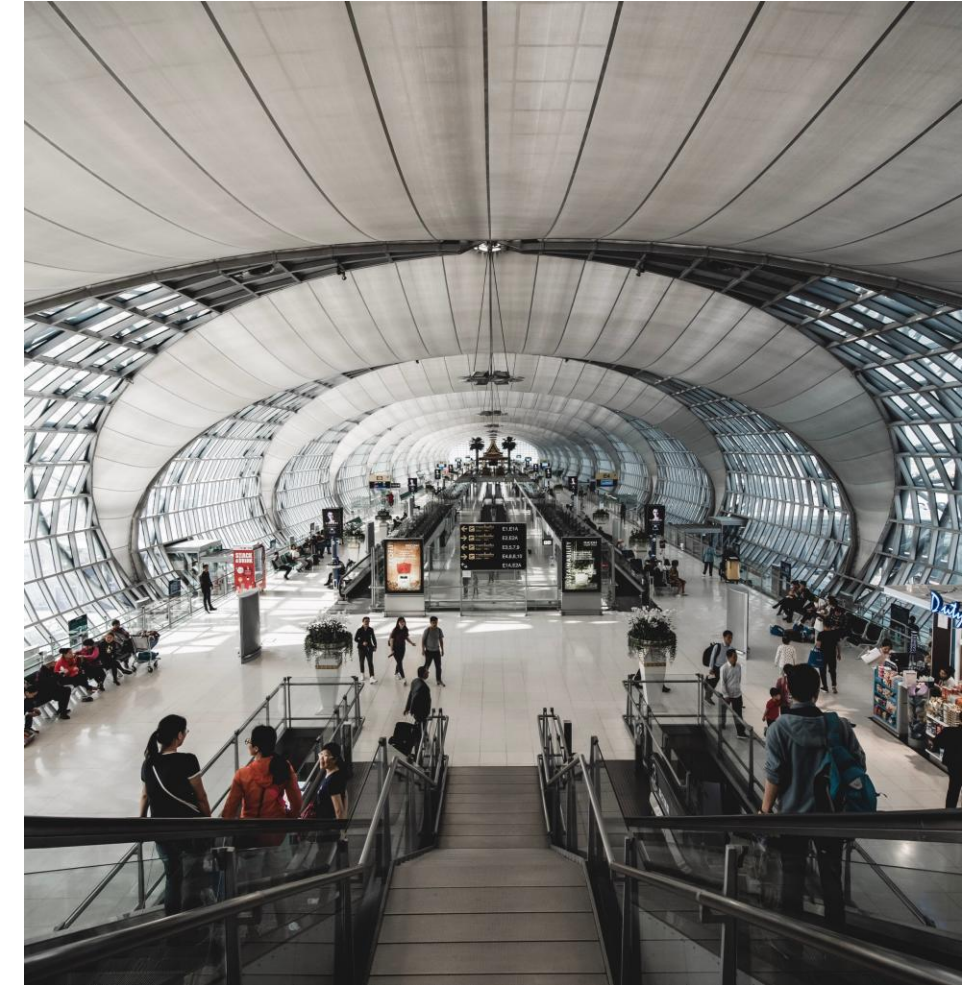
Next 6 Months: **+6% YoY**

LATAM focus: Key origin countries for airline capacity growth

Forecasted Air Supply for flights arriving to LATAM between May 2026 and Oct 2026, as of 17 May 2026; % difference year-over-year (YoY)

Top performing origin countries*	% share	Next 6 months (YoY variation)
Dominican Republic	3.1%	+23%
Canada	2.3%	+15%
Panama	6.9%	+15%
Netherlands	1.0%	+13%
Spain	5.6%	+9%
Portugal	1.5%	+7%
Argentina	5.7%	+6%
Colombia	6.7%	+5%
Mexico	3.1%	+4%
Brazil	6.8%	+4%
TOTAL LATAM	100%	+3%

*Considering origin countries that represent more than 1.0% share



LATAM focus: Key destinations driving airline capacity growth

Forecasted Air Supply for flights arriving to LATAM between May 2026 and Oct 2026, as of 17 May 2026; % difference year-over-year (YoY)

Top Performing Destinations*	% share	Next 6 months (YoY variation)
Venezuela	1.3%	+51%
Uruguay	1.1%	+12%
Argentina	8.1%	+12%
Panama	10.7%	+12%
Ecuador	2.6%	+8%
Brazil	14.0%	+5%
Colombia	12.2%	+4%
El Salvador	3.3%	+2%
Peru	5.8%	+1%
TOTAL LATAM	100%	+3%

*Considering destinations that represent more than 1% share



Travel Intent

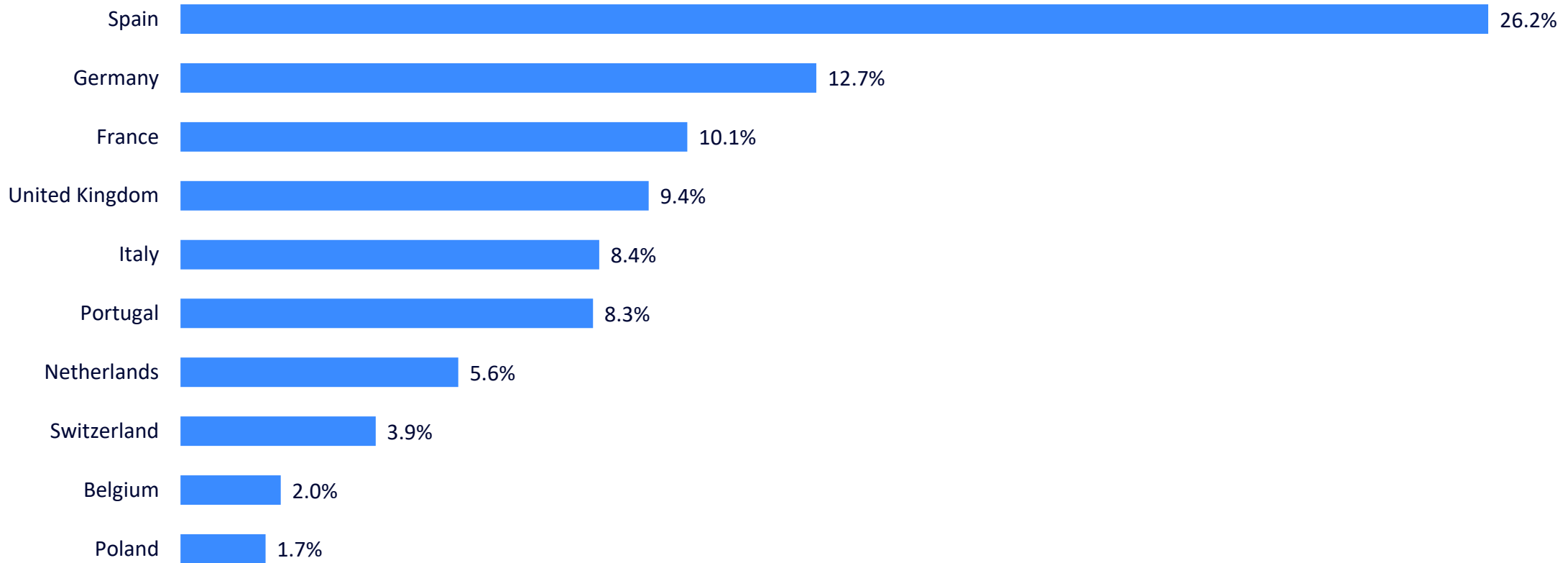
Monitor Flight Searches to understand travel demand



Which trip origins from Europe are showing the highest intent to visit LATAM?

Flight Searches made from Europe to LATAM in the last 12 months, as of 24 May 2026

Top search origins (% share of flight searches)



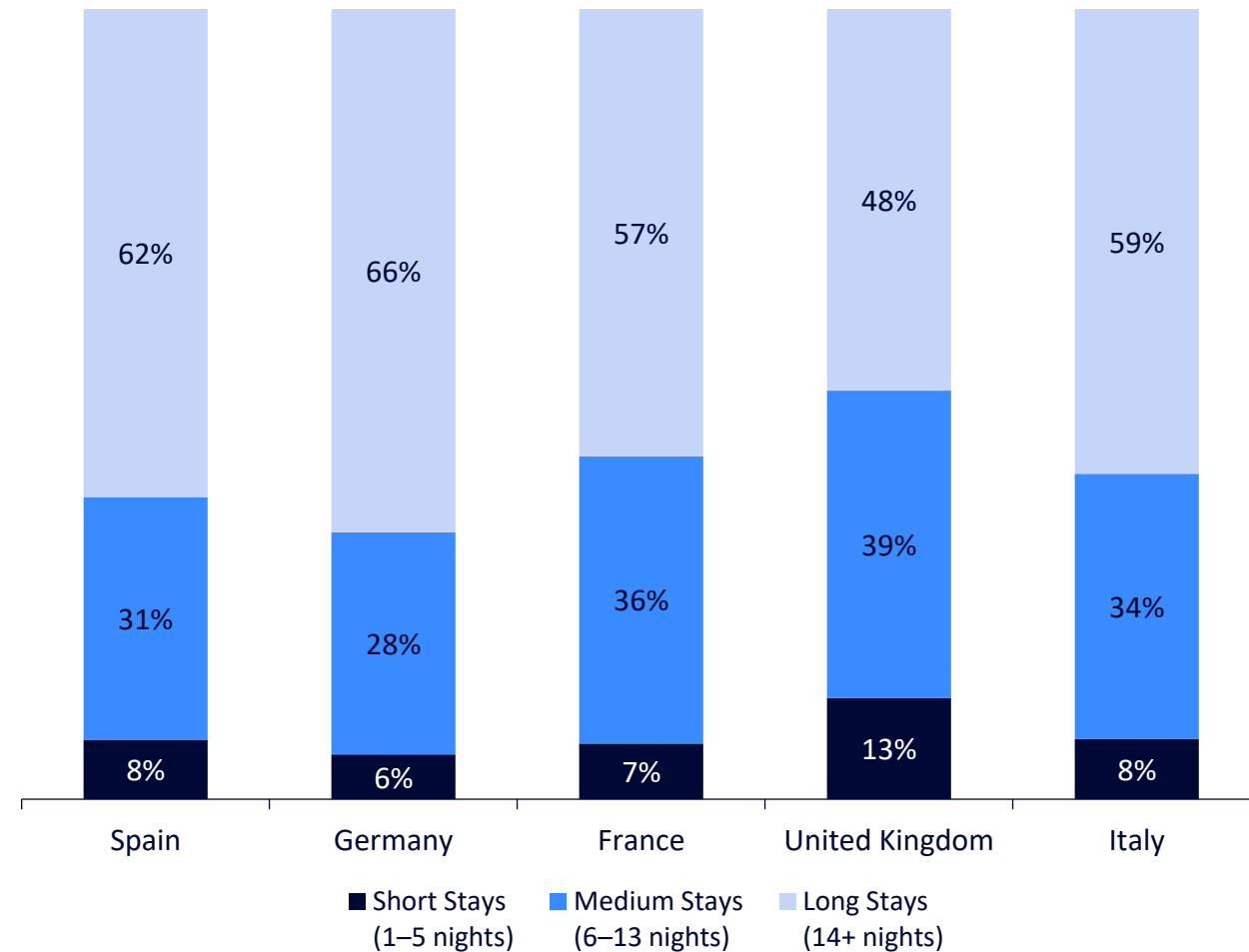
© Amadeus IT Group and its affiliates and subsidiaries

How stay length varies by trip origin

Flight Searches made from Europe to LATAM in the last 12 months, as of 24 May 2026

Different origins have different stay preferences...

...Targeting long stay travelers can have a more positive impact on the destination



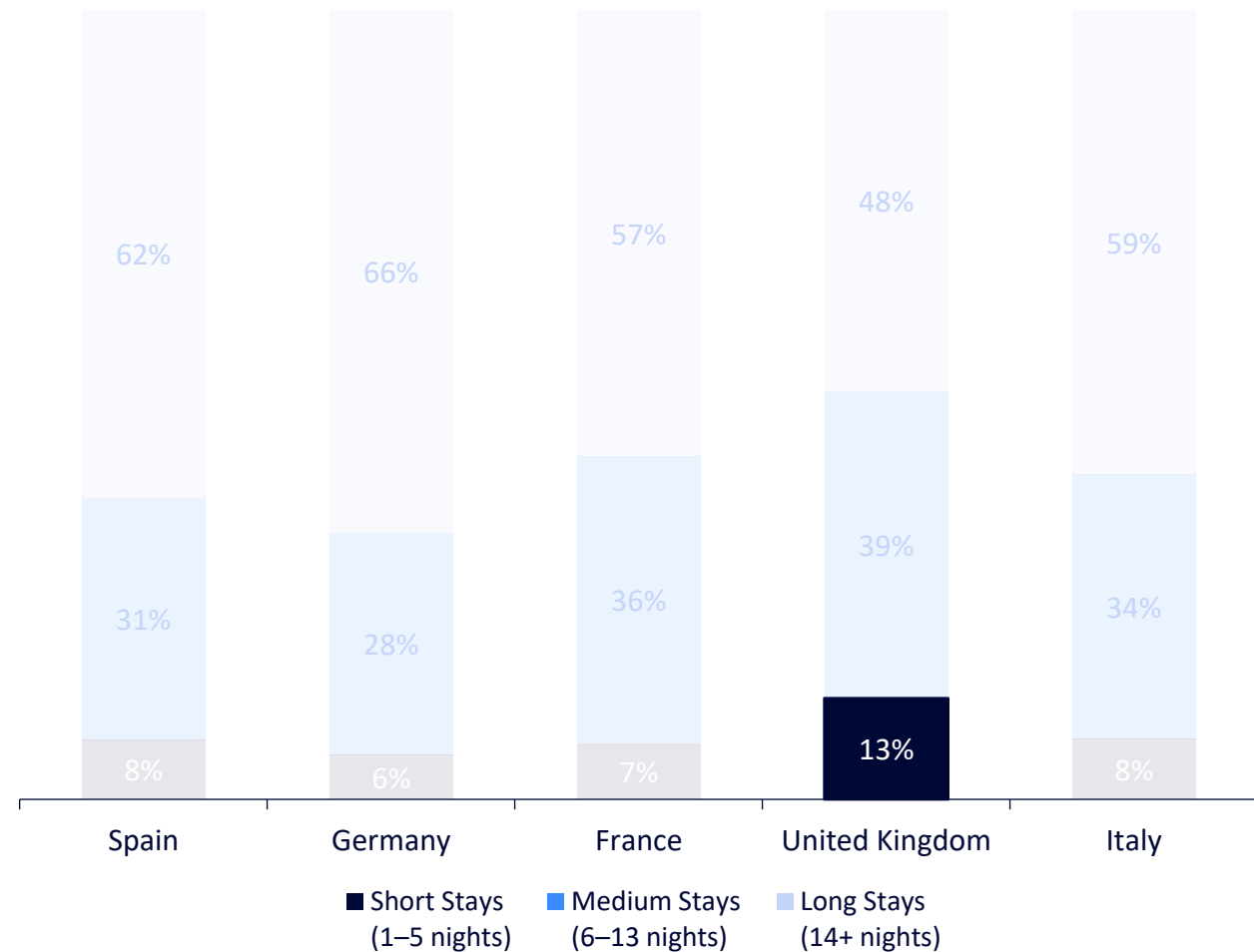
© Amadeus IT Group and its affiliates and subsidiaries

How stay length varies by trip origin

Flight Searches made from Europe to LATAM in the last 12 months, as of 24 May 2026

Different origins have different stay preferences...

...United Kingdom has a larger share of short stays

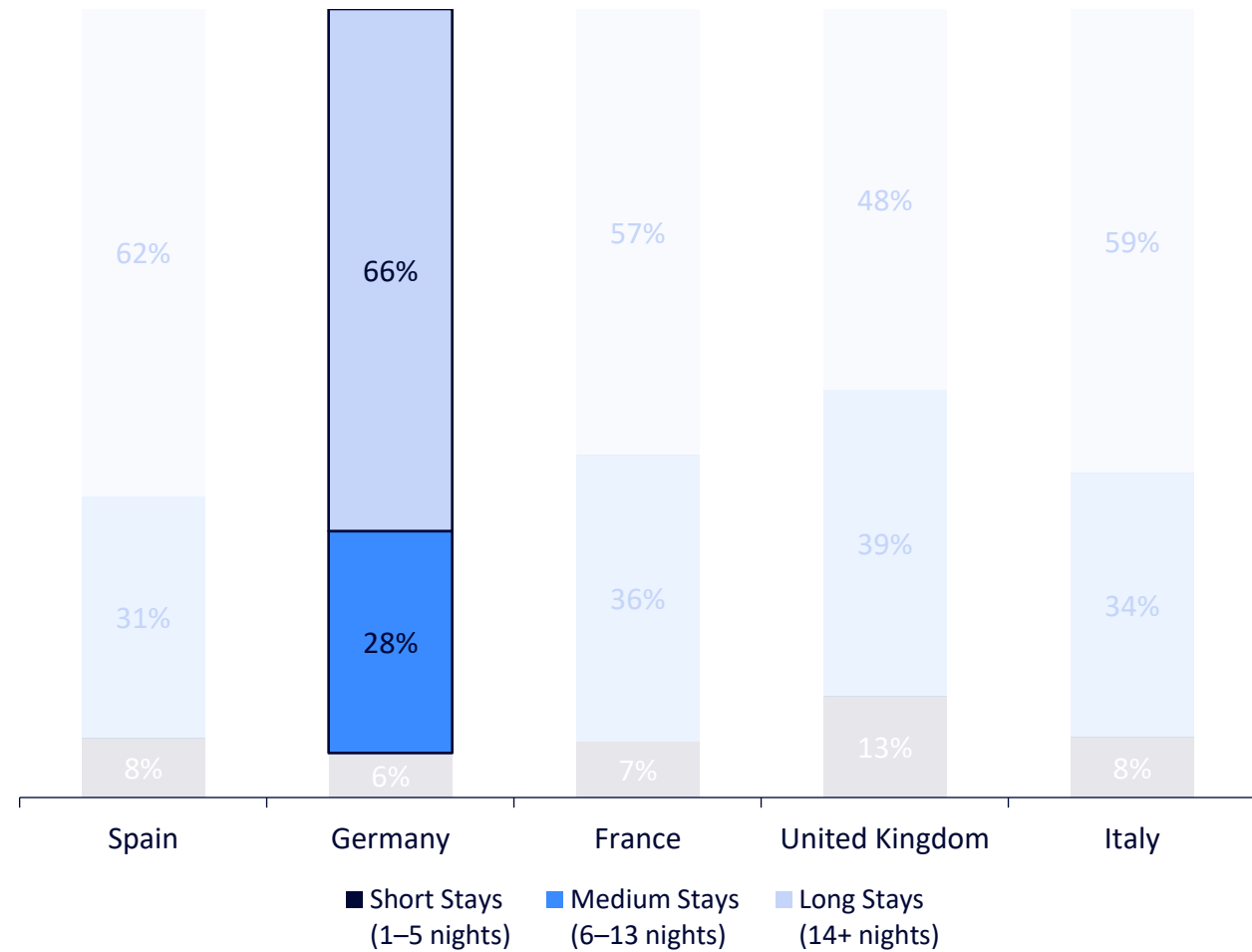


How stay length varies by trip origin

Flight Searches made from Europe to LATAM in the last 12 months, as of 24 May 2026

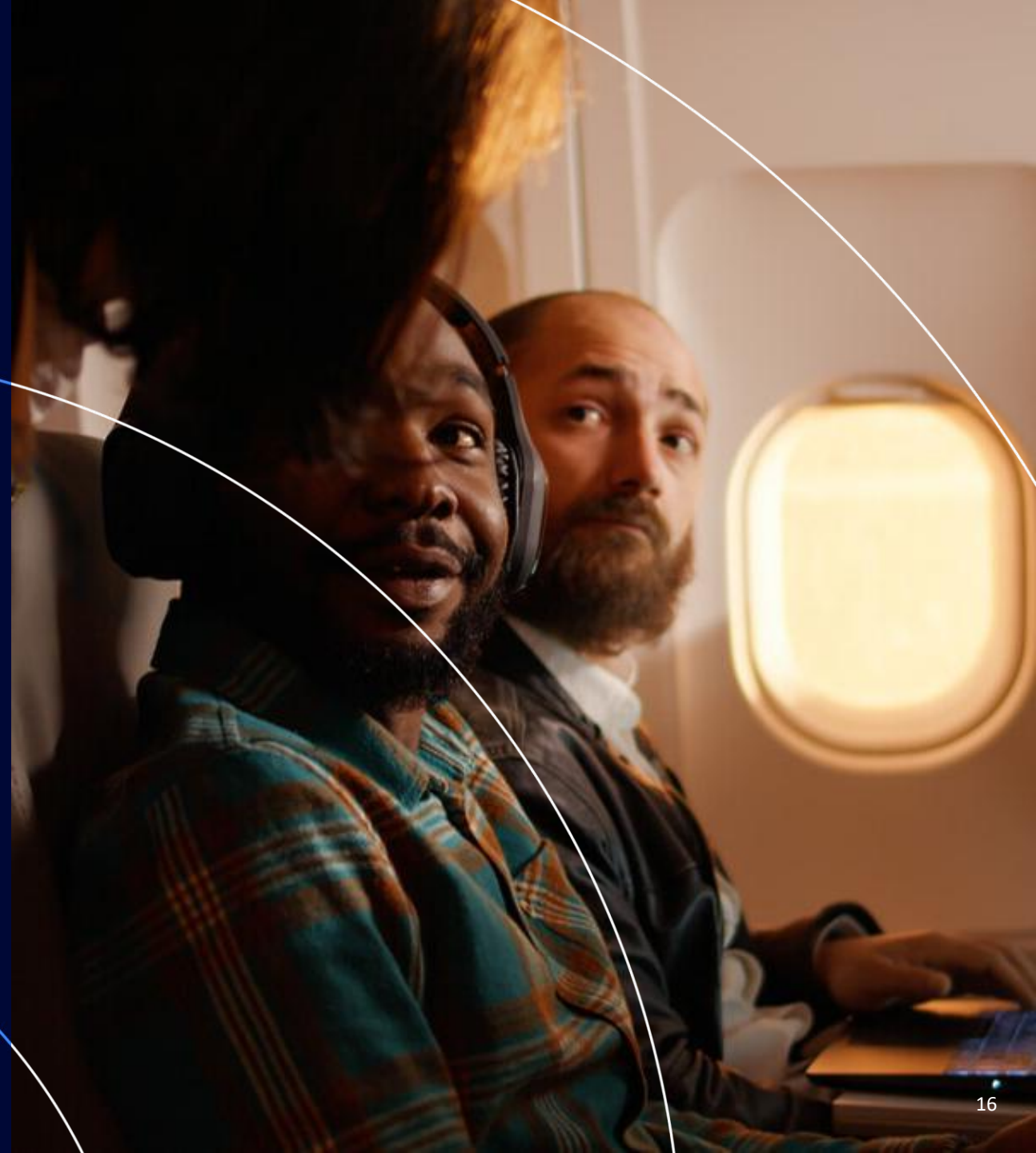
Different origins have different stay preferences...

...Germany has a larger share of medium & long stays



Visitor profiles

Cabin Classes,
Group Sizes and
Traveler Ages



Future outlook to LATAM: High-value travelers from Europe are key

International tourist arrivals to LATAM from Europe on premium class cabins in the next 6 months, as of 23 May 2026; % difference year-over-year (YoY)



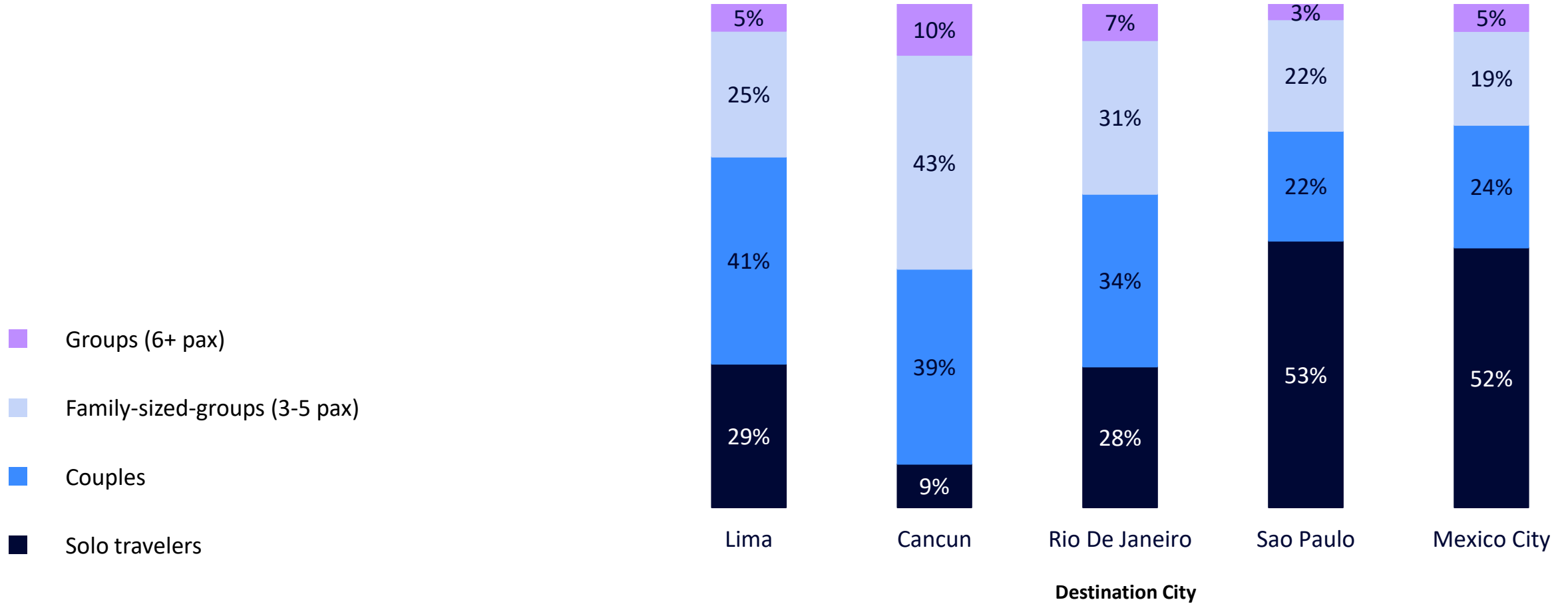
*Premium Class Cabins = Premium Economy, Business & First

Top performing trip origins*	Premium Cabins* (YoY variation)
United Kingdom	+25%
Italy	+17%
Portugal	+12%
Germany	+11%
Austria	+10%
Spain	+9%
Netherlands	+8%
France	+7%
Switzerland	+5%
Belgium	+5%

*considering trip origins that represent more than 1.5% share

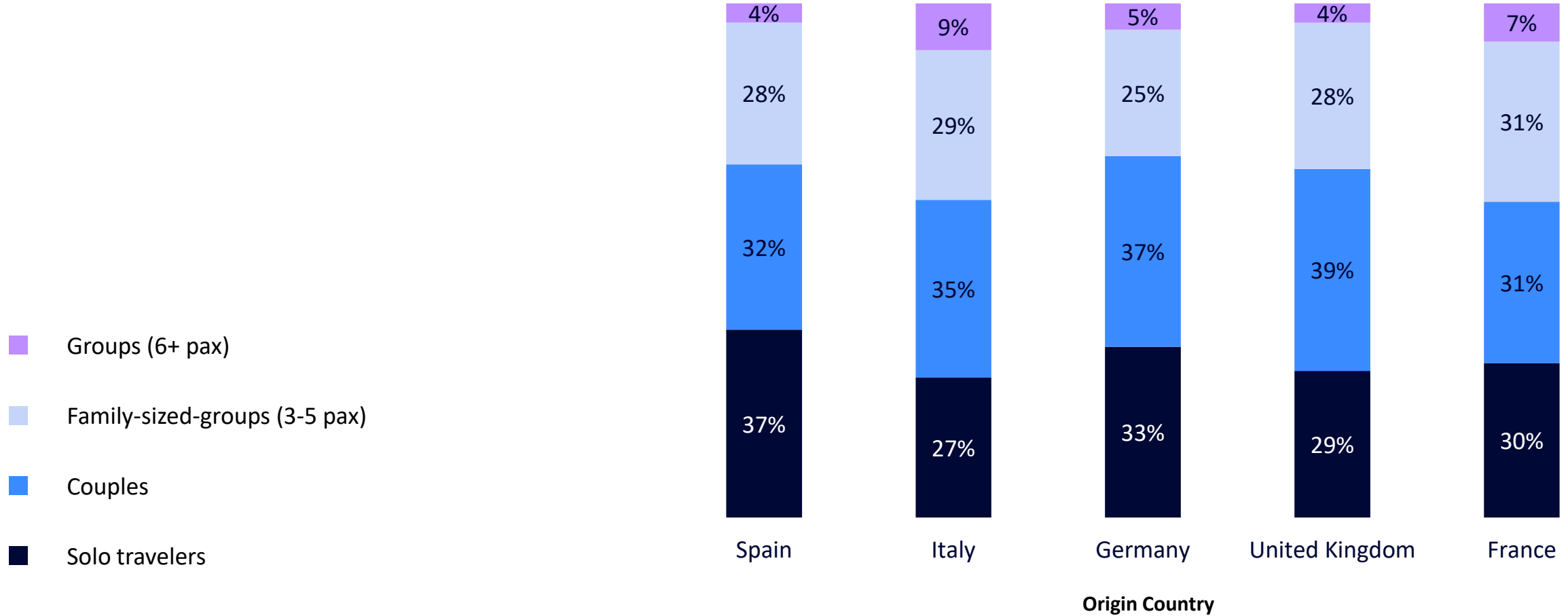
How different destinations attract different traveler profiles

International tourist arrivals from Europe to LATAM in the next 6 months, as of 23 May 2026



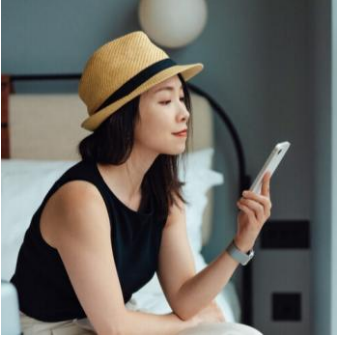
Understanding traveler profiles: Difference in group size by trip origin

International tourist arrivals from Europe to LATAM in the next 6 months, as of 23 May 2026



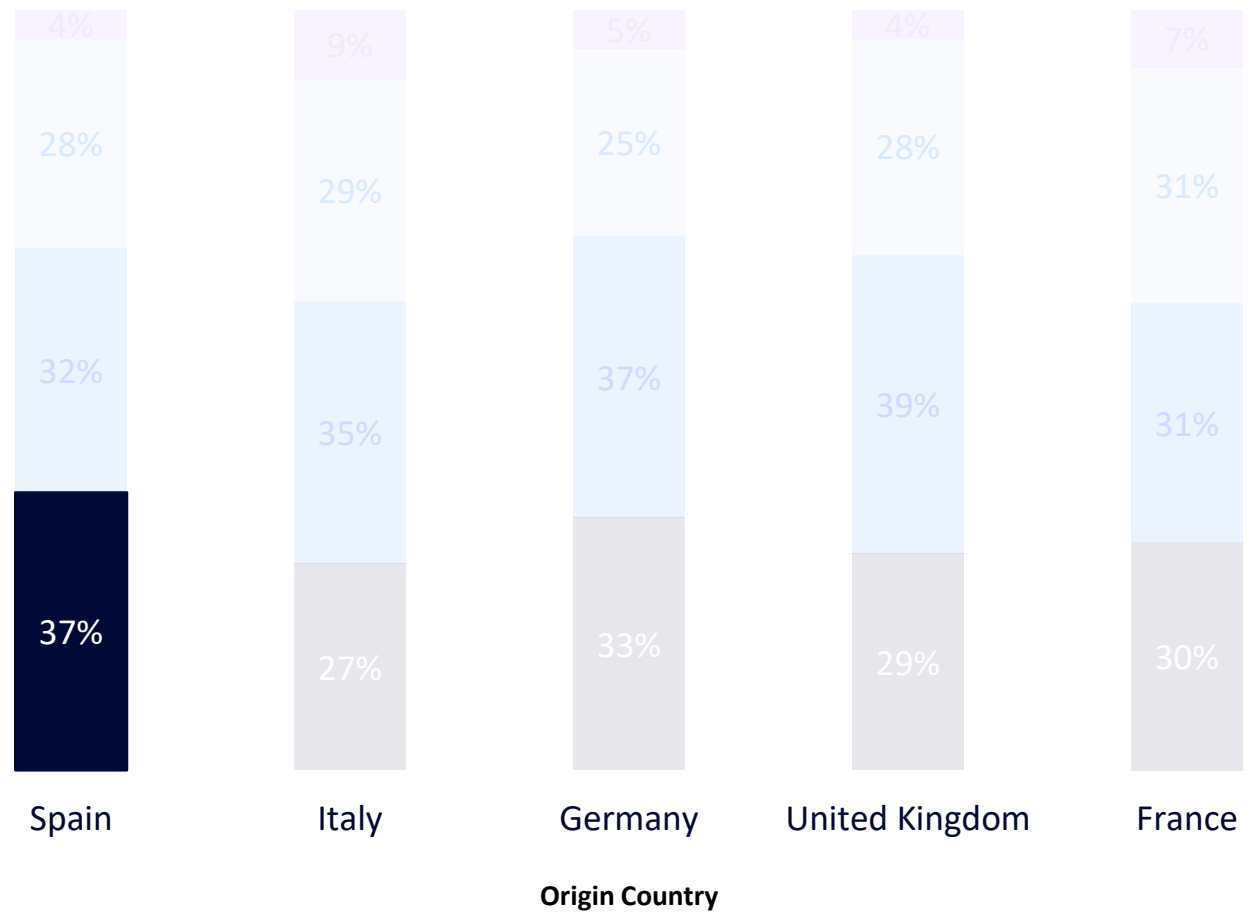
Understanding traveler profiles: Difference in group size by trip origin

International tourist arrivals from Europe to LATAM in the next 6 months, as of 23 May 2026



Solo travelers represent a larger proportion from Spain

- Groups (6+ pax)
- Family-sized-groups (3-5 pax)
- Couples
- Solo travelers



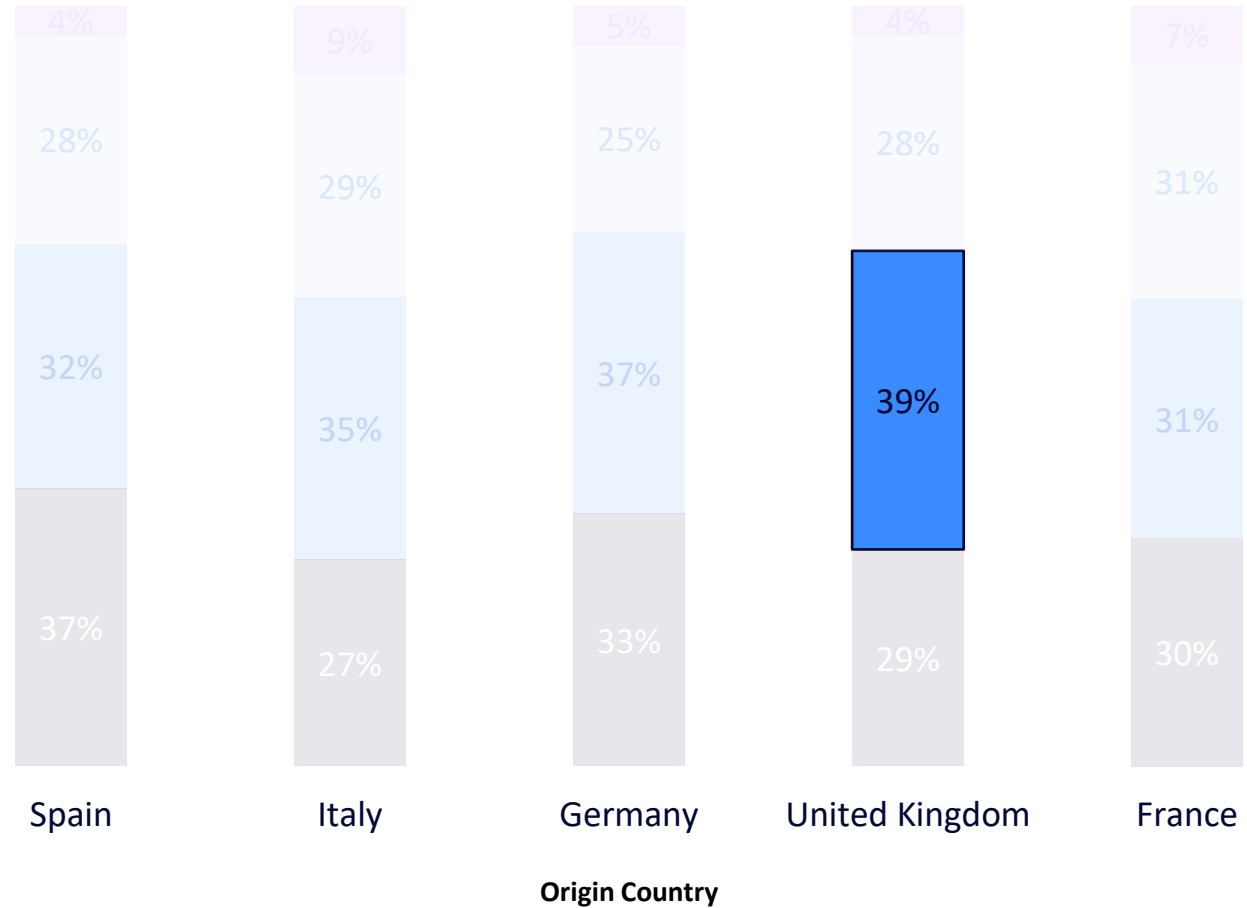
Understanding traveler profiles: Difference in group size by trip origin

International tourist arrivals from Europe to LATAM in the next 6 months, as of 23 May 2026



Couples represent a larger proportion from United Kingdom

- Groups (6+ pax)
- Family-sized-groups (3-5 pax)
- Couples
- Solo travelers



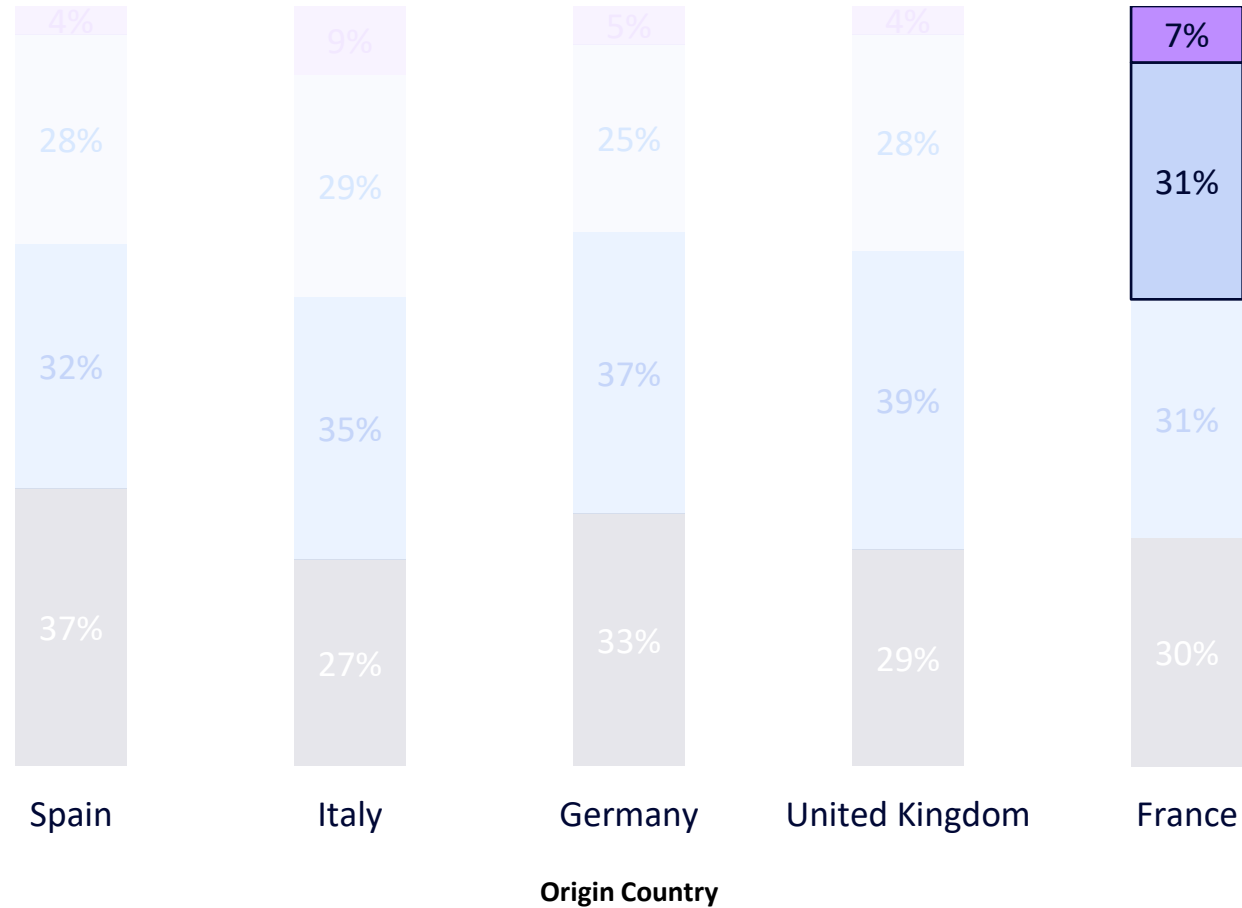
Understanding traveler profiles: Difference in group size by trip origin

International tourist arrivals from Europe to LATAM in the next 6 months, as of 23 May 2026



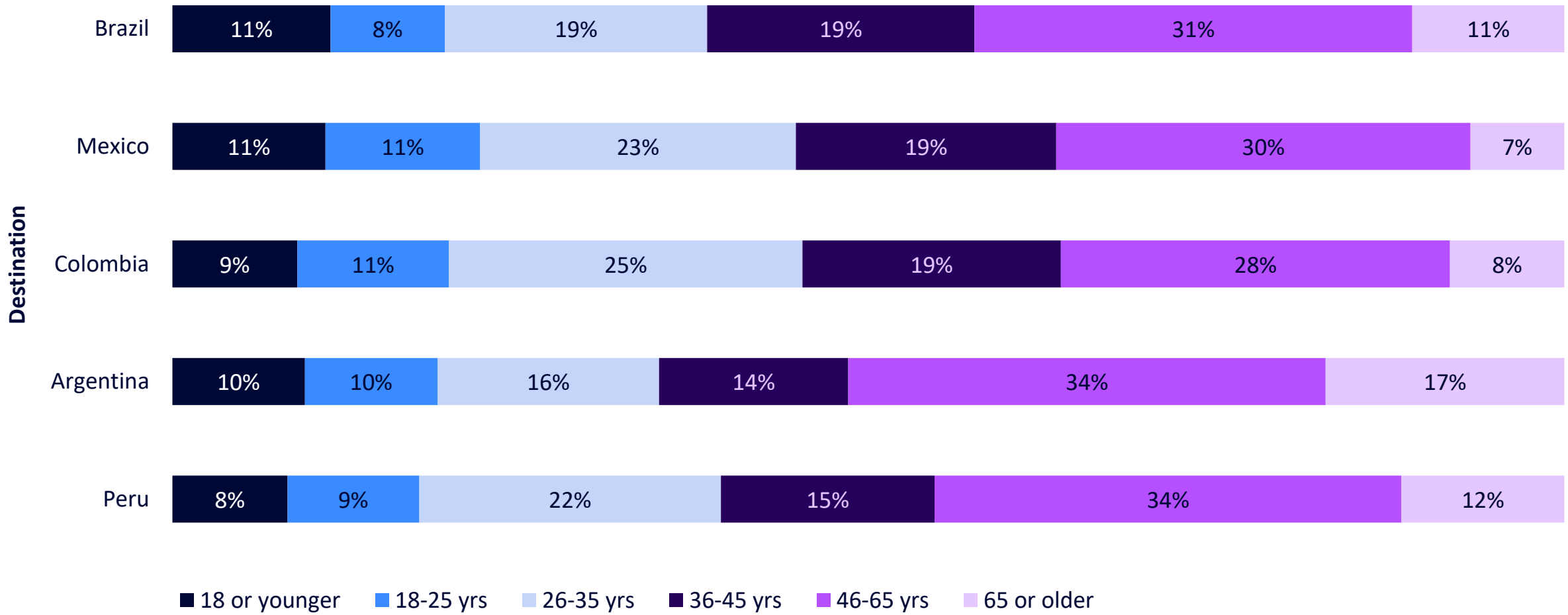
Families and groups represent a larger proportion from France

- Groups (6+ pax)
- Family-sized-groups (3-5 pax)
- Couples
- Solo travelers



How destinations attract distinct traveler age profiles

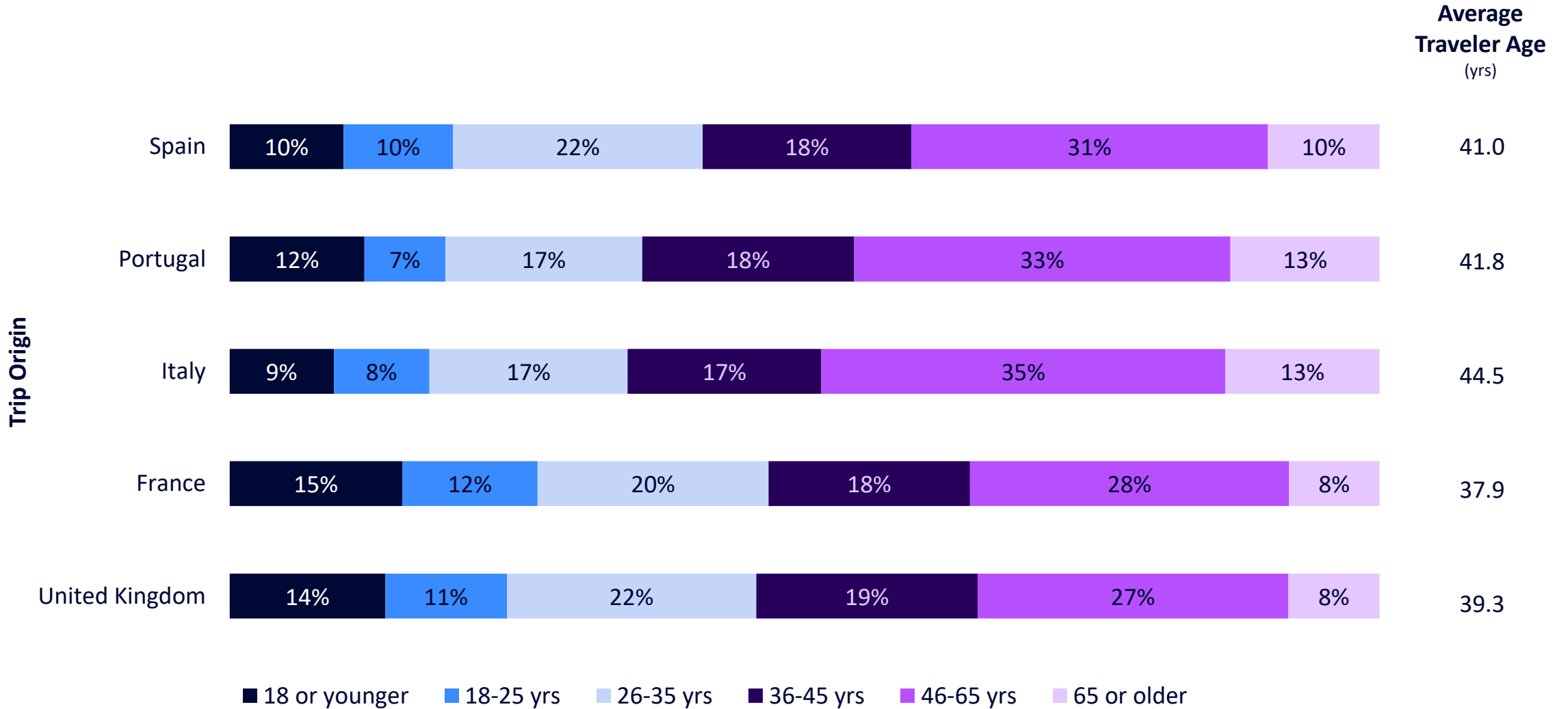
International tourist arrivals to LATAM from Europe between May 25 and Apr 26



© Amadeus IT Group and its affiliates and subsidiaries

LATAM focus: Varying traveler ages by trip origin

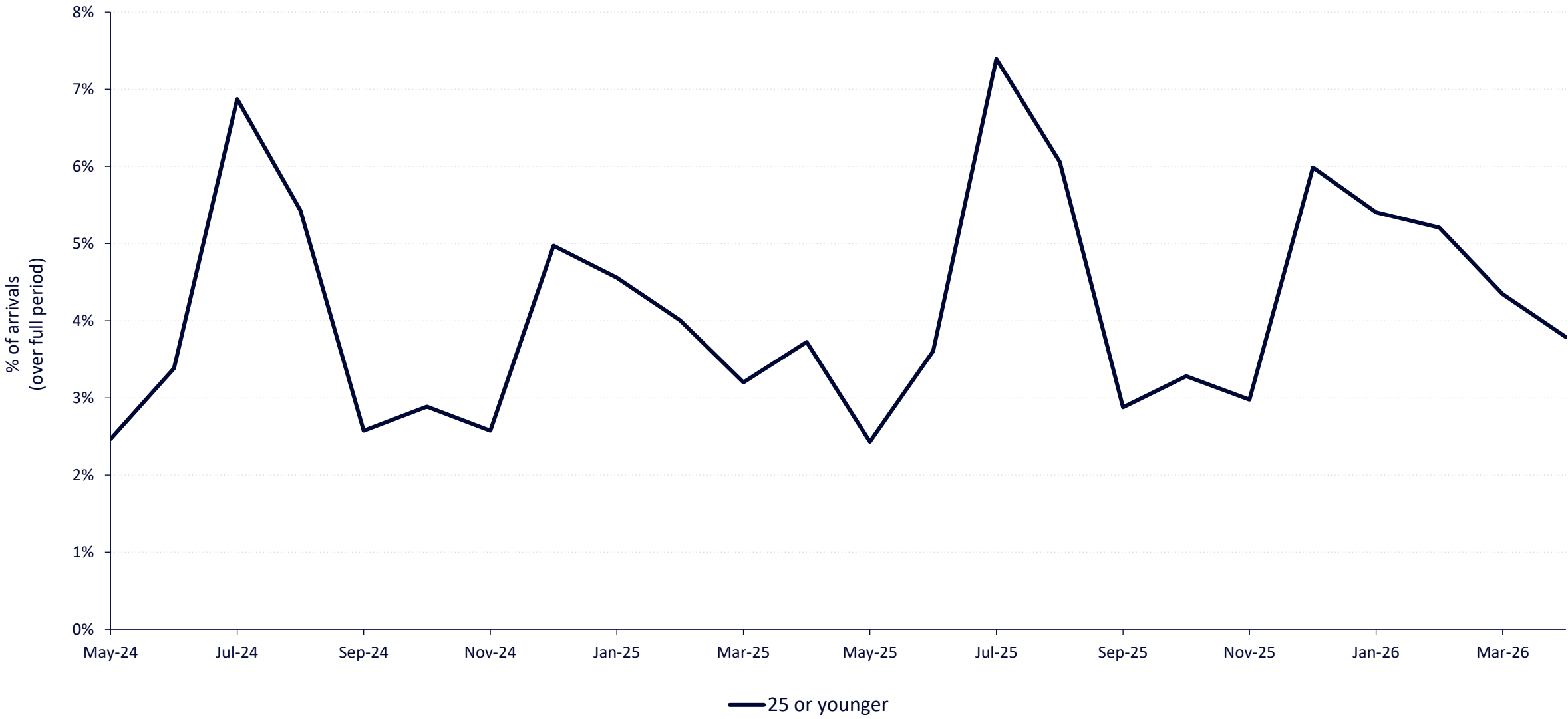
International tourist arrivals to LATAM from Europe between May 25 and Apr 26



© Amadeus IT Group and its affiliates and subsidiaries

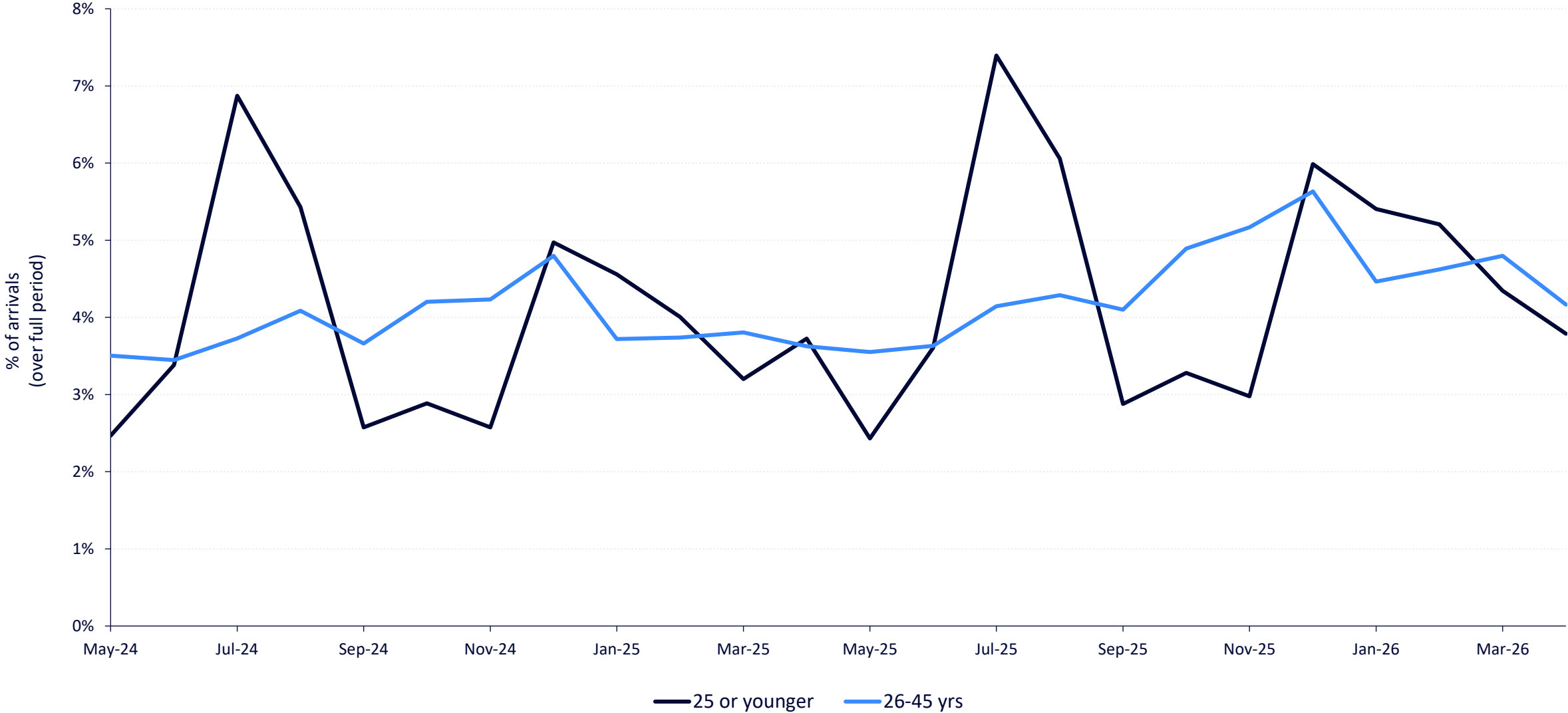
Seasonal shifts in age profiles of international travelers

International tourist arrivals to LATAM from Europe between May 24 and Apr 26



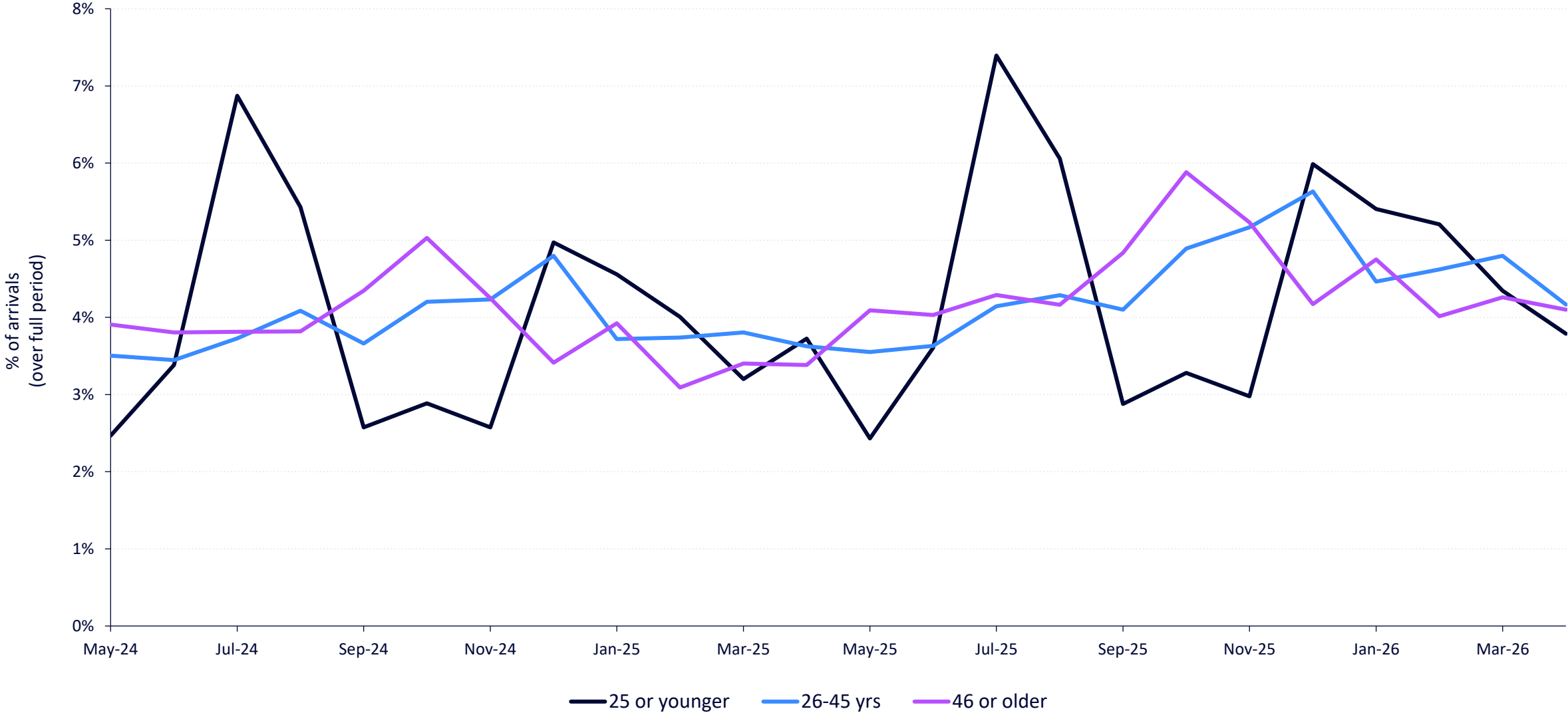
Seasonal shifts in age profiles of international travelers

International tourist arrivals to LATAM from Europe between May 24 and Apr 26



Seasonal shifts in age profiles of international travelers

International tourist arrivals to LATAM from Europe between May 24 and Apr 26



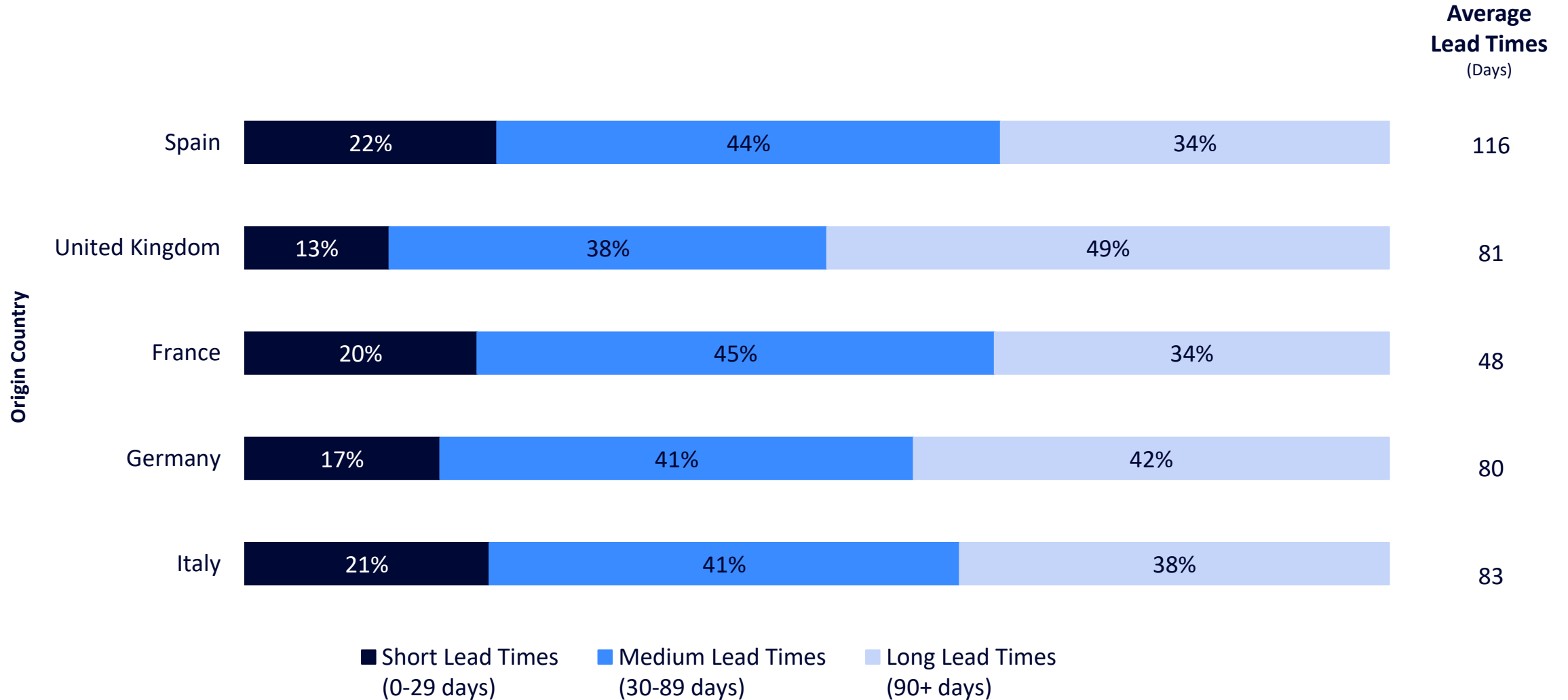
Understand your visitors

Lead Times



Different nationalities have difference booking patterns

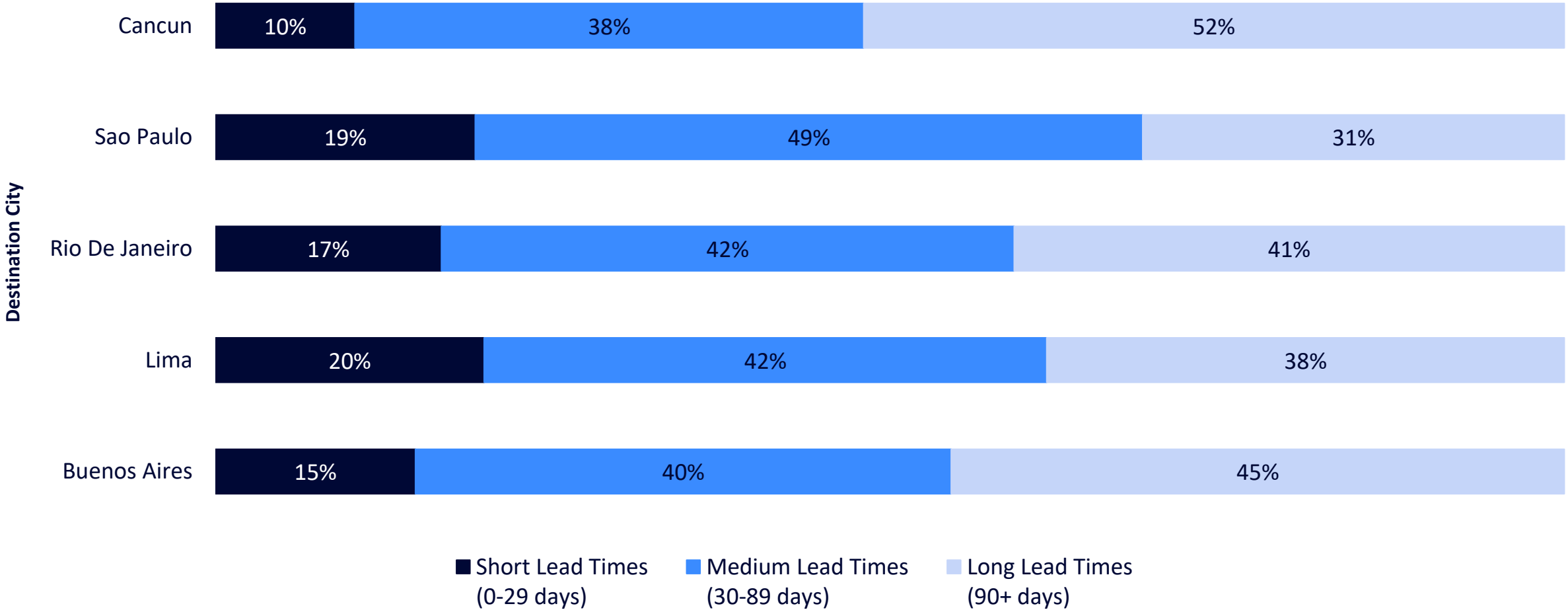
Lead times for international tourist arrivals to LATAM from Europe in the last 12 months, as of 17 May 26



© Amadeus IT Group and its affiliates and subsidiaries

How distinct destinations attract travelers with varying anticipation

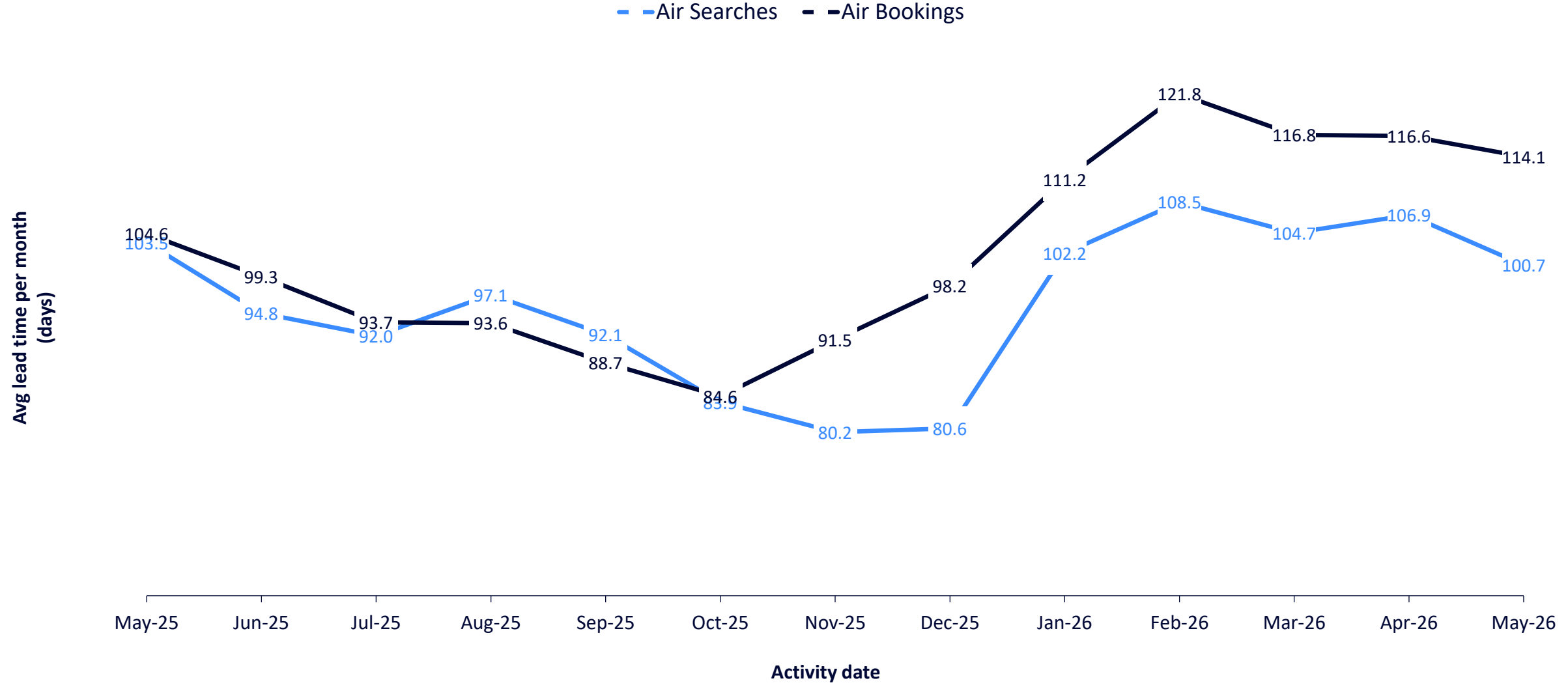
Lead times for international tourist arrivals to LATAM from Europe in the last 12 months, as of 17 May 26



© Amadeus IT Group and its affiliates and subsidiaries

Understand your visitors: Average lead times for flight searches and bookings to LATAM

Average lead times for flight searches and tourist bookings made from Europe to LATAM in the last 12 months, as of 23 May 2026



© Amadeus IT Group and its affiliates and subsidiaries

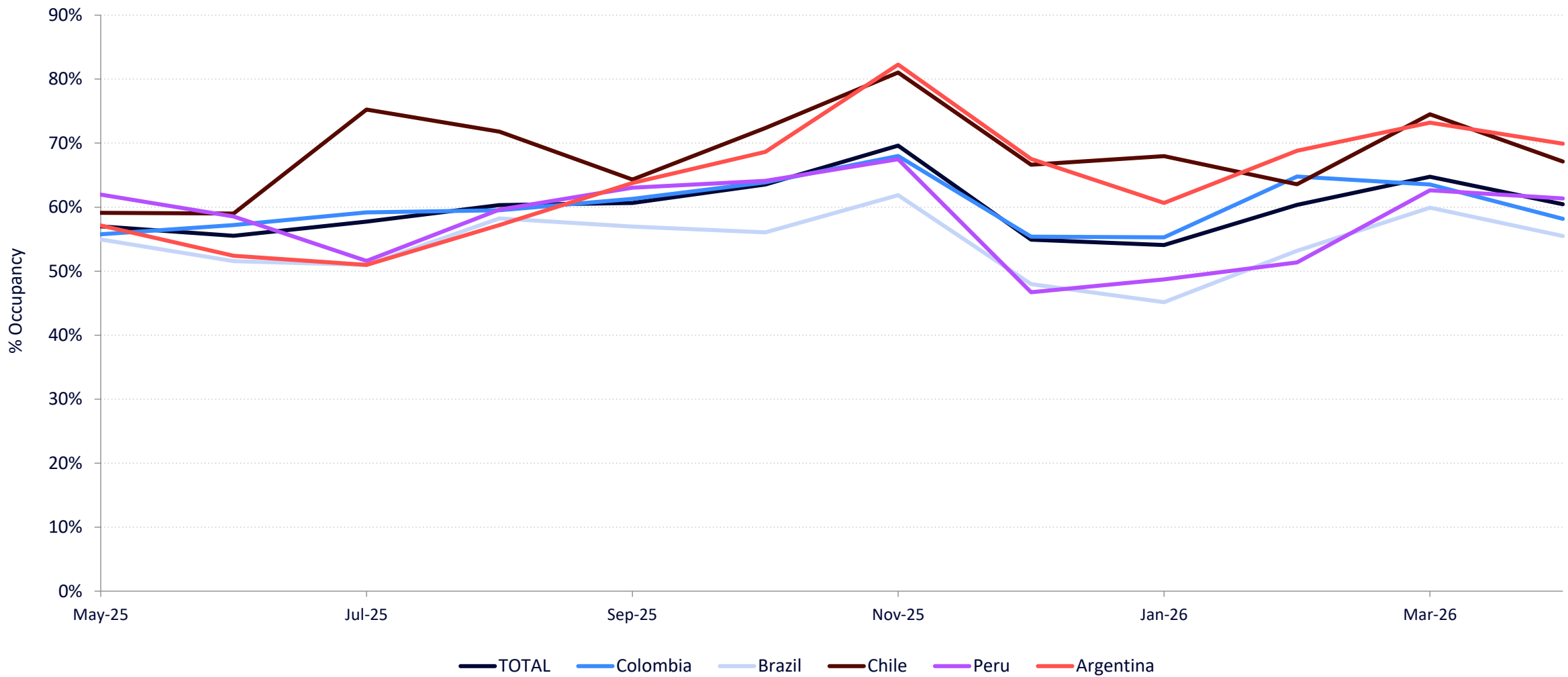
Hospitality

Hotel Occupancy and Average Daily Rates



Hotel occupancy evolution across key South American destinations

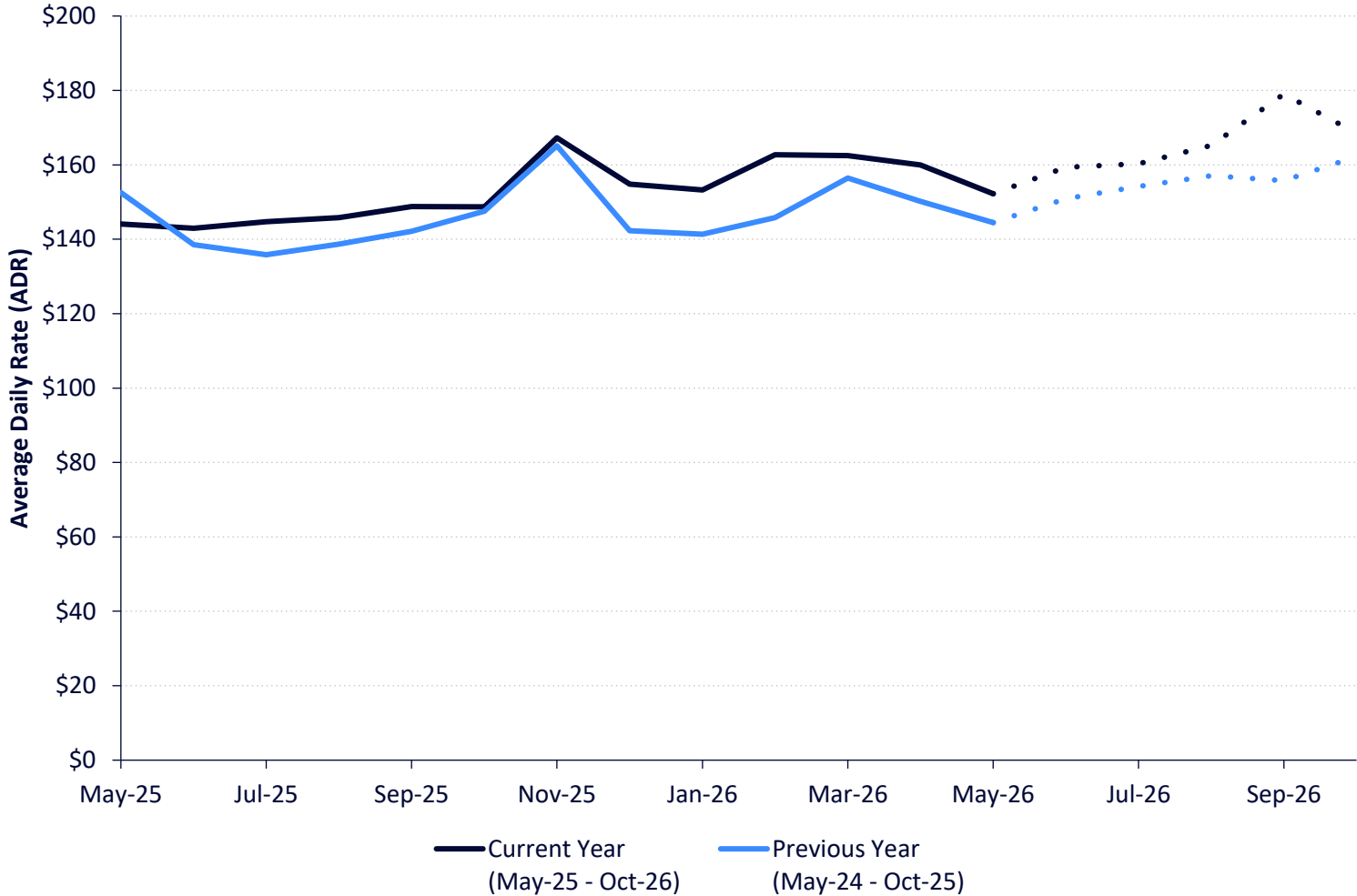
Average occupancy rates for hotels in South America between May 2025 and Apr 2026



© Amadeus IT Group and its affiliates and subsidiaries

Average daily hotel rates in South America

On-the-books ADR between May 2025 and Oct 2026, as of 21 May 2026; % difference year-over-year (YoY)



Forward Looking Average Daily Rate

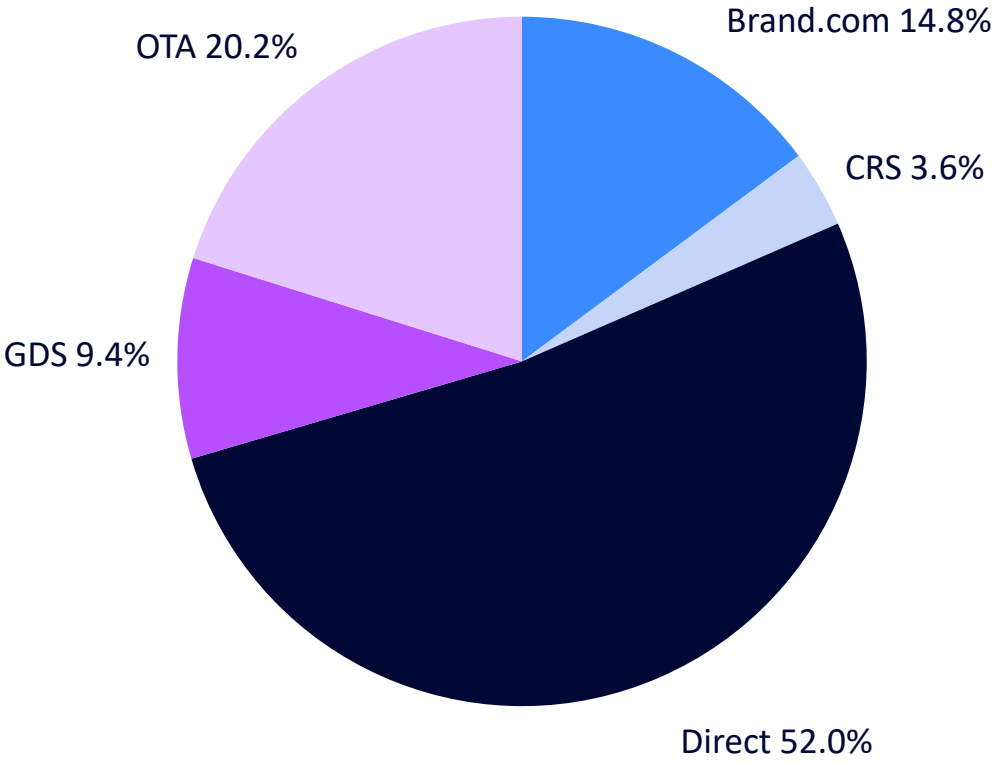
(May 2026 - Oct 2026)


South America
\$158
+6%
Vs previous year

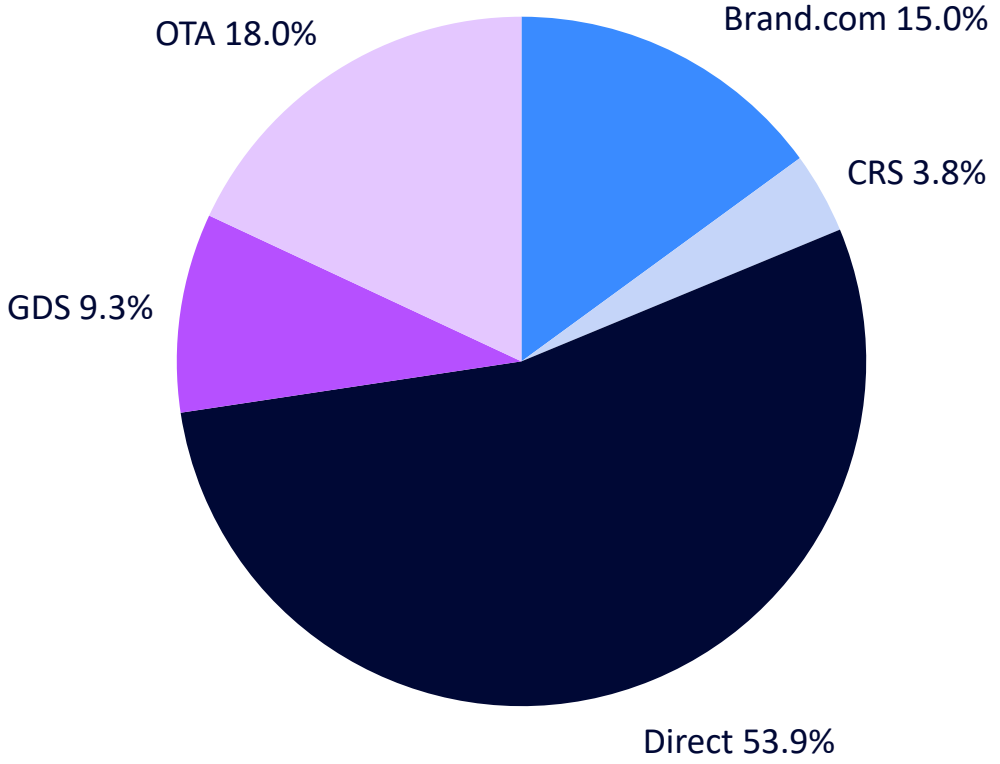
Bookings Channels: Get clarity on how travelers book hotel reservations in LATAM?

Hotel bookings in LATAM, between May 2025 and Apr 2026, as of 21 May 2026; vs previous year

Last 12 months
May-25 to Apr-26



Previous year
May-24 to Apr-25



6-month outlook

Expected Trends
and Opportunities



6-month outlook: Growth in key European origins

Forecast for international tourist arrivals to LATAM from Europe in the next 6 months, as of 17 May 26; % difference year-over-year (YoY)

Top performing origin countries*	% share	Next 6 months (YoY variation)
Ireland	0.7%	+25%
Germany	11.7%	+4%
Netherlands	6.5%	+2%
Portugal	8.4%	+2%
Spain	25.0%	+1%
France	11.4%	=0%
TO LATAM FROM EUROPE	100%	-1%

*considering origin countries that represent more than 0.5% share

6-month outlook: Intra-Regional focus highlights large YoY growth from key origins

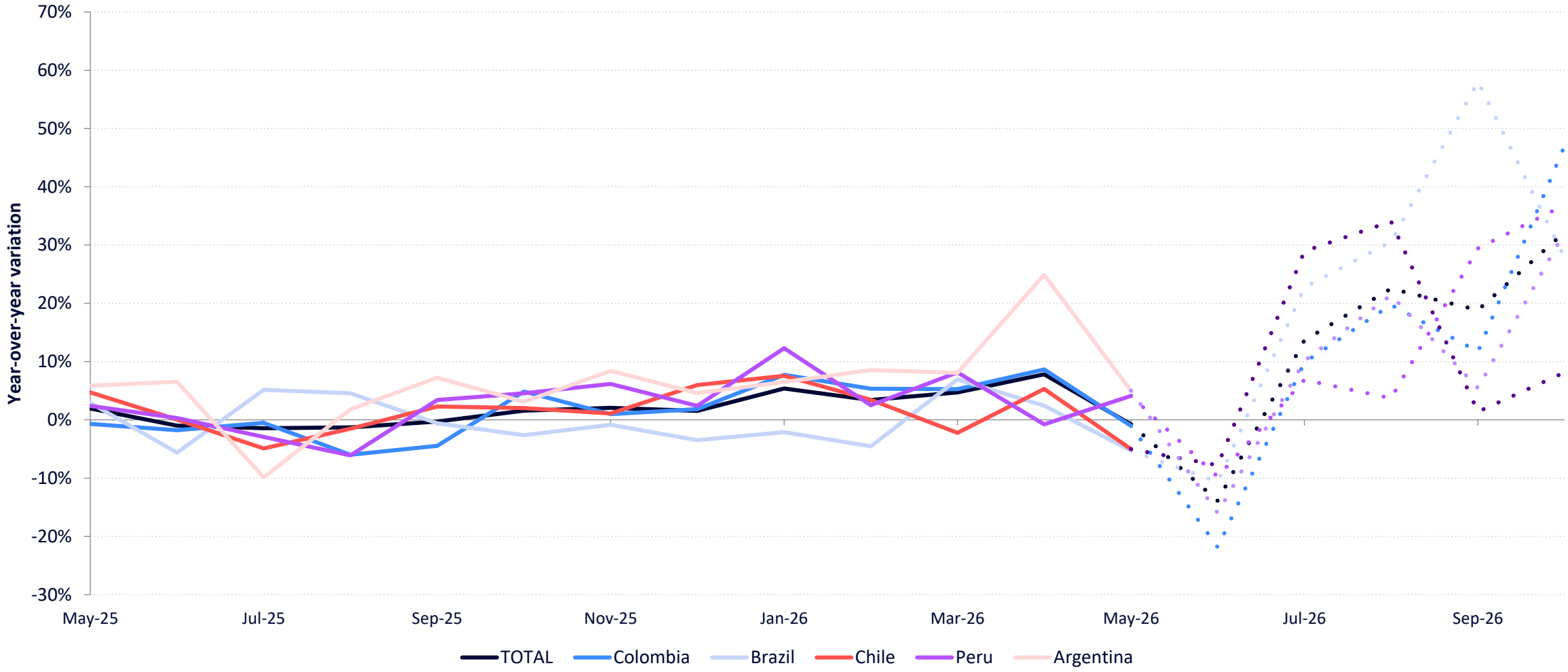
Forecast for international tourist arrivals to LATAM from the Americas in the next 6 months, as of 24 May 26; % difference year-over-year (YoY)

Top performing origin countries*	% share	Next 6 months (YoY variation)
Venezuela	0.8%	+51%
Dominican Republic	0.8%	+15%
Canada	7.6%	+12%
Panama	4.3%	+11%
El Salvador	0.6%	+11%
Aruba	0.1%	+10%
Trinidad and Tobago	0.2%	+9%
Honduras	0.7%	+9%
Argentina	7.5%	+8%
Uruguay	1.1%	+7%
Intra-Regional	100%	+1%

*considering origin countries that represent more than 1.0% share

6-month outlook: Hotel occupancy trends year-over-year

Occupancy for hotels in LATAM between May 2025 and Oct 2026, as of 21 May 2026; % difference year-over-year (YoY)



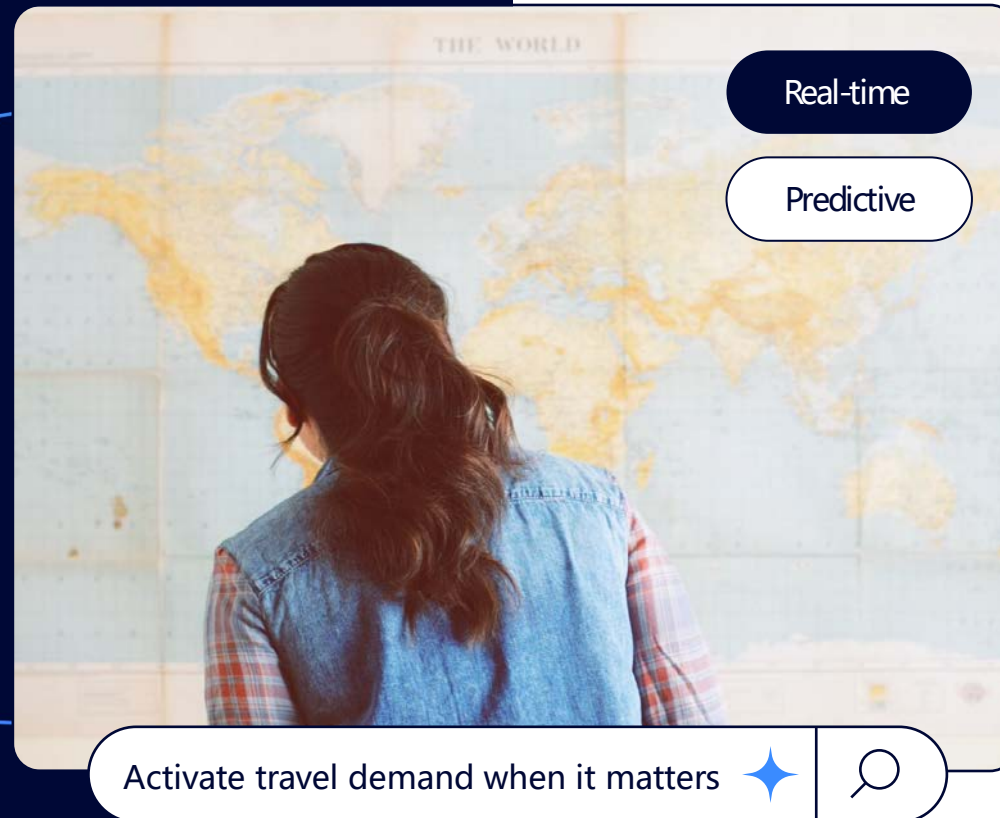
© Amadeus IT Group and its affiliates and subsidiaries

What now?

Advertising that
combines early
demand with
tangible outcomes



At Amadeus Advertising, we believe in earlier capture of emerging demand



Our mission is turning turning travel-intent intent into better bookings:

- Identify high-intent demand sooner
- Activate advertising faster
- Reach the right travelers earlier
- Generate better bookings

Uruguay's multi-phase display campaign relies on early demand signals.

In-Destination Visitors

9.213

People exposed to the campaign in the target markets, markets, actually visiting Uruguay post-campaign

Digital advertising

6 days

Average length of stay
stay

\$5.08

Revenue generated

Digital Advertising ROAS

51:1

Return of Ad Spent (ROAS)

“This campaign gave us the opportunity to showcase Uruguay's seasonal appeal while reaching the right travelers at the right time. What truly sets it apart is our ability to **measure tangible outcomes, which confirms the real-world impact of our digital strategy.**”

Pablo Menoni,

Minister of Tourism Uruguay,
Uruguay Tourism Board

Takeaways

- 1 Air connectivity to LATAM is growing, but unevenly.
- 2 Demand remains resilient, driven by key origin countries.
- 3 High-value travelers and longer stays are key growth drivers.
- 4 Data-led marketing and advertising is required to win the right travelers, at the right time.





Thank you!
Let the data tell you.

Olivier Ponti
Director of Market Intelligence & Insights

Email
olivier.ponti@amadeus.com

Visit us at
<https://www.amadeus-hospitality.com>

Request your own report

