

amadeus

CHTA



CARIBBEAN
HOTEL & TOURISM
ASSOCIATION

Amadeus' Destination Insights

Caribbean Travel Trends

2026



Amadeus — It's how travel works better.

www.amadeus-hospitality.com

Amadeus' Destination Insights

Caribbean Travel Trends 2026



amadeus | **CHTA**  **CARIBBEAN
HOTEL & TOURISM
ASSOCIATION**

The data included in this document is accurate according to Amadeus' market research database as of April 2026.

© Amadeus IT Group and its affiliates and subsidiaries

Foreword

Building on the success of the previous editions of the Caribbean Travel Trends, this report is the result of a collaborative effort between Amadeus and the Caribbean Hotel and Tourism Association (CHTA), offering insights on key travel trends in the Caribbean.

As global tourism competition continues to intensify, Caribbean destinations are entering a new phase—one defined less by rapid growth and increasingly by the need to optimize performance, diversify demand, and build long-term resilience. While tourism demand continues to grow, the pace has moderated, placing greater emphasis on how destinations attract the travelers, at the right time, and in the most sustainable way.

This year's findings highlight the growing importance of market diversification, value-led travel, and connectivity efficiency. Latin American source markets are playing an increasingly strategic role in supporting growth, high-value demand, and shoulder- and low-season travel. At the same time, airline network consolidation and evolving travel behavior underscore the need for smarter, more targeted approaches to stimulating demand—particularly beyond traditional peak periods.

In an environment shaped by abundant traveler choice, data-driven decision-making is no longer optional. Understanding shifts in demand, identifying high-potential visitor segments, and aligning marketing and media investment with booking windows and traveler intent are critical to maintaining competitiveness. When combined with targeted advertising and coordinated promotion, these insights give destinations a powerful set of tools to influence travel planning, amplify major moments such as events, and convert interest into bookings.

To support destinations in navigating this evolving landscape, Amadeus and the Caribbean Hotel and Tourism Association (CHTA) present this latest edition of the Caribbean Travel Trends report. Drawing on air travel, hospitality,

and traveler behavior data, the report provides actionable insight into destination performance, connectivity patterns, seasonality dynamics, and high-value travel opportunities, offering practical guidance for tourism stakeholders across the region.

Our shared commitment to actionable intelligence and collaboration aligns closely with CHTA's mission to strengthen the Caribbean tourism ecosystem. By translating data into insight—and insight into action—destinations can refine their strategies, unlock new demand drivers, and work toward a more resilient, balanced, and competitive future for Caribbean tourism.



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



Sanovnik Destang, President, The Caribbean Hotel & Tourism Association

About Amadeus

Amadeus powers travel experiences that feel personal, authentic, and connected.

We are building an open ecosystem that links customers, travelers, partners, and suppliers with industry-wide content and intelligence. Our technology brings hotel stays, destination adventures, and seamless journeys to life.

Partnering with a global community – hotels, destinations, and travel sellers – we unite to anticipate demand, exceed expectations, and build lasting relationships. From inspiration to guests' return home, we help customers deliver seamless, personalized experiences that drive growth. By connecting data, technology, and people, we empower hospitality teams to anticipate guest needs, improve operations, and focus on creating unique service.

We focus on three areas: driving profitable demand through data and insights, enabling operational excellence with streamlined solutions, and delivering differentiation and loyalty to help our customers stand out and build lasting guest relationships.



About the Caribbean Hotel and Tourism Association (CHTA)

The Caribbean Hotel and Tourism Association (CHTA) is the leading organization representing the interests of the Caribbean hospitality and tourism industry for more than 60 years. With 32 National Hotel Associations as well as 1,000 diverse members spanning hotels, resorts, tourism providers, and allied partners across the region and beyond, CHTA serves as a powerful voice, resource, and connector for the Caribbean's most vital industry. Through ongoing advocacy, professional development, industry insights, and market intelligence, CHTA helps its members thrive in today's competitive global marketplace. Organizations worldwide with interest in the Caribbean that want to increase their presence and connectivity in the Caribbean Hospitality and tourism industry are invited to join this dynamic community. To learn more about membership benefits and upcoming virtual and in-person events, please visit www.caribbeanhotelandtourism.com.

“In a more competitive and choice-rich travel environment, understanding demand is only the first step. The real opportunity for Caribbean destinations lies in using these insights to actively shape traveler perception and capture demand at the moments that matter most. By aligning insight-led targeting with clear destination positioning, destinations can position themselves more clearly, reach the travelers earlier in their planning journey, and convert intent into meaningful growth.”

— **Sol Freixa**, Vice President, Commercial, Destinations, Amadeus



Table of contents

1 Destination Performance:
Identifying Stand-Out
Markets

(Page 10)

2 Connectivity Patterns
Shaping Caribbean
Travel

(Page 18)

3 Seasonality
Trends and Market
Opportunities

(Page 21)

4 The Role of Events
in Driving Tourism
Demand

(Page 26)

Unify the world's travel data to enable smarter decisions

Amadeus Destination Gateway

Facilitate comprehensive data visualization for everyone in your organization.

Amadeus Destination Gateway delivers comprehensive historical and forward-looking air travel data, empowering destinations to monitor performance by origin market, season, and route.



Amadeus Data Connect

Empower data-savvy analysts: seamlessly integrate data with your own BI and programming tools. No-code access to an extensive library of prebuilt Data Smarts with seamless integration into your dashboards, allowing you to generate custom insights.



1. Destination Performance

Identifying Stand-Out Markets

Overseas travel demand to the Caribbean grew by +1% between April 2025 and March 2026, marking a clear deceleration compared with previous years (+21% in 2023 vs. 2022 and +8% in 2024 vs. 2023). This moderation suggests that the post-recovery momentum is stabilizing, increasing the importance of data-driven and highly targeted marketing strategies to sustain growth.

Against this backdrop, Latin American source markets emerge as a key opportunity to strengthen resilience through greater diversification. Demand from these markets continues to grow consistently year over year, in contrast to signs of slowdown observed across several traditional long-haul markets. This sustained momentum highlights the strategic value of prioritizing Latin America as part of a broader effort to rebalance demand and mitigate exposure to slowing markets.

Overseas tourist arrivals to the Caribbean between April 2025 and March 2026; % variation vs previous year.

	Var vs previous year
Top Tier	=0%
Second Tier	+2%
Caribbean Total	+1%

Top tier destinations are those that represent more than 5% share of total Caribbean tourist arrivals.

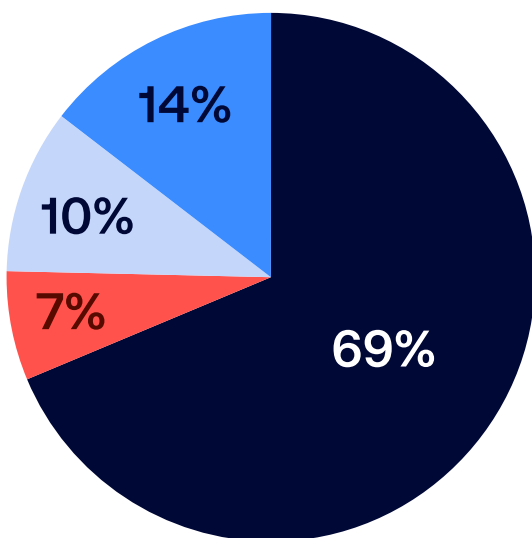
Second tier destinations are those that represent less than 5% share of total Caribbean tourist arrivals.

Demand from Latin American markets is not only increasing overall but is also showing particularly strong growth in premium travel segments, with a rising share of searches and bookings in higher-end cabin classes, as explored later in this report. This trend points to a growing appetite for higher-value travel from the region, reinforcing Latin America's role as a strategically important source market for the Caribbean.

More broadly, the Caribbean continues to attract a wide diversity of travel profiles, which plays a crucial role in building destination resilience. Each destination is characterized by a distinct mix of visitors, underlining the importance of deeply understanding traveler segments.

Leveraging these insights allows destinations to deliver the right messages to the right audiences at key moments in the travel planning cycle. Using travel intent data for targeting, destinations can engage potential travelers across channels, from social to digital content environments, while aligning campaign spend with origin-specific search-to-book windows to maximize the effectiveness of targeted media strategies.

Nationality guest mix



- North America ● Latin America
- Europe ● Caribbean

Overseas tourist arrivals to the Caribbean between April 2025 and March 2026; % variation vs previous year.

# Rank	Nationality	% Share	YoY
1	Argentina	2.3%	+45%
2	Mexico	1.6%	+44%
3	Brazil	0.9%	+39%
4	Peru	0.9%	+35%
5	Colombia	2.9%	+27%

Nationality is inferred based on passenger country of origin or residence, using observed travel patterns. This is a modeled indicator and does not represent declared citizenship.

Top-Performing Destinations

Among the top-performing destinations in the Caribbean, results reflect a mix of top-tier destinations such as **Aruba** and the **Dominican Republic**, and a group of second-tier destinations, defined as those representing less than 5% share of total demand.

While performance among top-tier destinations remained stable year over year (=0% YoY), second-tier destinations recorded stronger momentum, with demand increasing by +2% YoY. This difference highlights that recent growth is increasingly being driven by smaller destinations expanding from a lower base, rather than by established, high-volume markets.

Overseas tourist arrivals to the Caribbean between April 2025 and March 2026; % variation vs previous year

# Rank	Destination	% Share	YoY
1	Dominica	0.2%	+22%
2	Guyana	1.1%	+19%
3	Sint Maarten	2.3%	+18%
4	Saint Martin	0.4%	+12%
5	Saint Vincent and the Grenadines	0.4%	+10%
6	Aruba	5.1%	+10%
7	Dominican Republic	32.8%	+8%
8	US Virgin Islands	2.5%	+8%
9	Curaçao	2.3%	+4%
10	Anguilla	0.2%	+4%
-	Caribbean Total	100%	+1%

Source: Amadeus Arrivals and Stays

Destinations in the Spotlight



Dominica stands out as one of the strongest performers, recording +22% year-over-year growth. This increase reflects rising demand for nature- and adventure-focused travel, positioning the destination as an emerging Caribbean market. While volumes remain limited (0.2% share), growth is aligned with a low-density, high-value tourism model, supported by improved air connectivity.

Sint Maarten also shows particularly strong year-over-year performance. These results should be interpreted within a broader regional context. Sint Maarten pairs its own tourist appeal with a role as a key gateway, providing access to Saint Martin via land connectivity and to nearby islands such as Anguilla and St. Barthélemy via boat and charter flights. This gateway function helps explain the unusually strong demand signals observed in the data.

Using Traveler Personas to Drive More Targeted Demand

Persona-based analysis highlights the diversity of travel profiles visiting the Caribbean and reinforces the importance of tailoring destination strategies to specific group dynamics and socio-demographic segments. By understanding who is traveling, how they travel, and where they over-index, destinations can more effectively align product development, marketing, and advertising to their strongest growth opportunities.

Group Travel Dynamics

Different Profiles, Different Opportunities

Between April 2025 and March 2026, duos, the two-person traveling parties, represented the largest share of overseas tourist arrivals (40.4%), followed by family-sized groups of three to five travelers (27.6%) and solo travelers (26%). Large groups (6+ travelers) accounted for a smaller but highly valuable segment at 6.1% of arrivals.

Overseas tourist arrivals to the Caribbean between April 2025 and March 2026; % variation vs previous year (YoY)

Solo travelers

represent 26% of tourist arrivals to the Caribbean

Top Performing Destinations	YoY
Guyana	+7%
Dominican Republic	+4%
Guadeloupe	+2%

Profile to target: Digital nomads & eco-adventure tourism.

Duos

represent 40.4% of tourist arrivals to the Caribbean

Top Performing Destinations	YoY
Sint Maarten	+8%
Saint Lucia	+7%
Aruba	+6%

Profile to target: Romantic get-aways, honeymoons, wellness/spas.

Family-sized-groups

(3-5 pax) represent 27.6% of tourist arrivals to the Caribbean

Top Performing Destinations	YoY
Cayman Islands	+9%
Curaçao	+6%
US Virgin Islands	+2%

Profile to target: Multi-bedroom suites, kids clubs.

Large groups

(6+ pax) represent 6.1% of tourist arrivals to the Caribbean

Top Performing Destinations	YoY
Barbados	+24%
Aruba	+14%
Bahamas	+3%

Profile to target: Private villas, group excursions, charter boats, wedding parties

Source: Amadeus Air Visitors

Each group type shows distinct destination affinities and growth patterns:

- **Solo travelers** perform strongly in destinations such as Guyana, the Dominican Republic, and Guadeloupe, aligning well with profiles centered on digital nomads, eco-adventure, and experiential travel.
- **Duos** drive growth in destinations like Sint Maarten, Saint Lucia, and Aruba, reinforcing demand for romantic getaways, honeymoons, and wellness-oriented offerings.
- **Family-sized groups** over-index in destinations such as the Cayman Islands, Curaçao, and the U.S. Virgin Islands, where multi-bedroom accommodations and family-friendly amenities are central to the value proposition.
- **Large groups** serve as a catalyst for growth in destinations like Barbados, Aruba, and the Bahamas, reflecting demand for private villas, group experiences, charter activities, and destination weddings.

These patterns underscore how aligning accommodation types, experiences, and targeted messaging to dominant group profiles can directly support destination performance.



Socio-demographics: Age Profiles Shape Demand and Seasonality

Socio-demographic insights add a further layer of differentiation. Travelers aged 26-45 account for the largest share of arrivals (35%), closely followed by the 46-65 segment (33%). Younger travelers under 26 represent 22%, while travelers aged over 65 account for 10% of arrivals.

Different age cohorts exhibit distinct behaviors and destination preferences:

- **Younger travelers** show stronger responsiveness to social media, video content, and peer reviews, performing particularly well in destinations such as the Bahamas, Puerto Rico, and Turks and Caicos.
- **Millennials and Gen X travelers** are strongly represented in destinations including Saint Lucia, Curaçao, and Grenada, supporting demand for couples-oriented, lifestyle-driven experiences.
- **Baby Boomers and older travelers** over-index in destinations such as Guyana, Anguilla, and Bonaire, where preferences lean toward comfort, authenticity, and longer lengths of stay—often supporting shoulder and low-season demand.

Together, these persona insights demonstrate that there is no single “Caribbean traveler.” Destinations that leverage persona-level intelligence—across group size, age, and travel motivation—are better positioned to:



- Prioritize the right source markets and traveler segments
- Tailor experiences and accommodation offerings
- Deploy more precise, data driven marketing and advertising strategies
- Attract higher value visitors and smooth demand across seasons

Persona based targeting ultimately allows destinations to move from broad promotion toward more differentiated, effective, and resilient tourism growth.

Overseas tourist arrivals to the Caribbean between April 2025 and March 2026

● Gen Alpha + Gen Z

Travelers under 26 years old represent 22% of tourist arrivals to the Caribbean

Destination	% Share
Bahamas	26.0%
Puerto Rico	25.5%
Turks and Caicos Islands	25.3%

Profile to target

High responsiveness to social media, video content, and peer reviews.

● Millennials

Travelers between 26-45 years old represent 35% of tourist arrivals to the Caribbean

Destination	% Share
Saint Lucia	43.1%
Curaçao	40.6%
Grenada	40.3%

Profile to target

Couples, honeymooners, and young families.

● Gen X

Travelers between 46-65 years old represent 33% of tourist arrivals to the Caribbean

Destination	% Share
Bonaire, Saint Eustatius, Saba	44.4%
British Virgin Islands	42.0%
Cuba	38.3%

Profile to target

Established professionals and repeat visitors, shoulder and low season opportunities.

● Baby Boomers

Travelers older than 65 years old represent 10% of tourist arrivals to the Caribbean

Destination	% Share
Guyana	17.5%
Anguilla	16.4%
Bonaire, Saint Eustatius, Saba	14.6%

Profile to target

Preference for comfort and longer length of stays.

Source: Amadeus Social Demographics

High-Value Demand and Traveler Mix

Latin American markets continue to gain importance, with demand increasing by +24% year over year, reinforcing their role as a key growth and diversification opportunity for the Caribbean.

Luxury-focused destinations attract an above-average share of premium cabin travelers, while destinations shown in lighter blue rely more heavily on economy cabin demand.

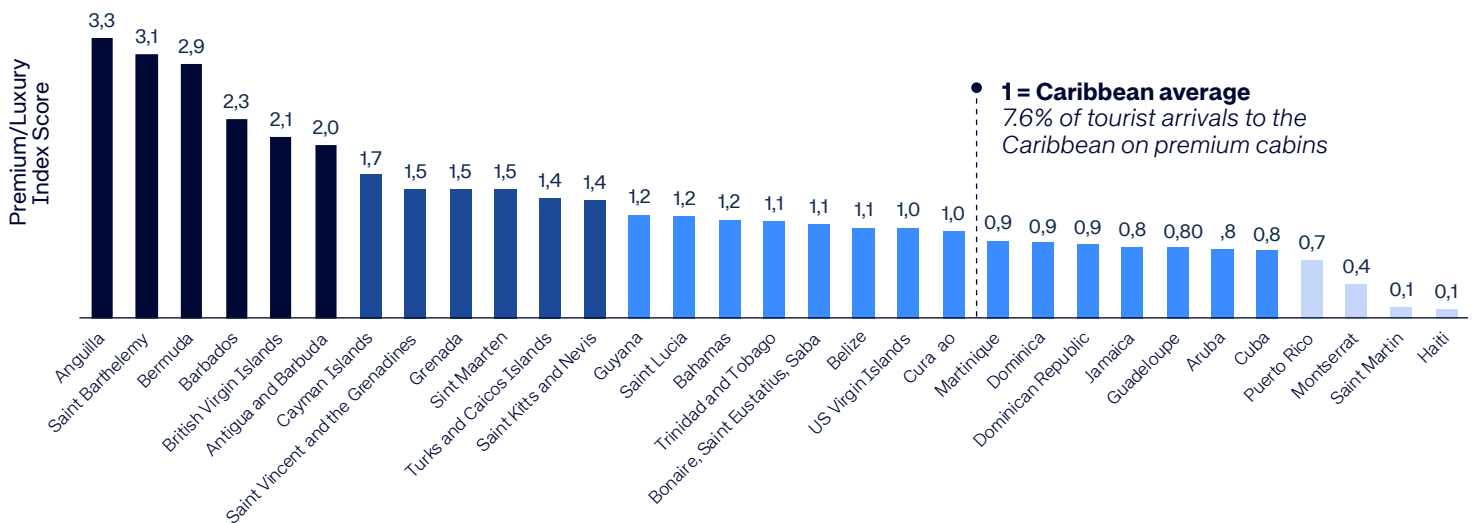
Anguilla, Saint Barthélemy, and Bermuda lead the luxury index, with premium travel shares between 22.4% and 24.8%, around three times the regional average.

In the Cayman Islands, growth in premium travel is largely driven by Canadian travelers, with high-end demand from this market increasing by +64% year over year.

At a regional level, South America remains a key driver of high-value tourism, with premium travel to the Caribbean increasing by +117% year over year. Peru (+192%) and Argentina (+164%) stand out, with a significant increase in premium travel demand.

Luxury and economy travel balance in line with regional average

Overseas tourist arrivals to the top 15 Caribbean destinations, between April 2025 and March 2026; % variation vs previous year



- High volume of luxury travel
- Strong presence of luxury travel
- Avg mix of luxury and economy travel
- High volume of economy travel

Source: Amadeus Air Visitors

Travel Dreams 2026


From data to delight

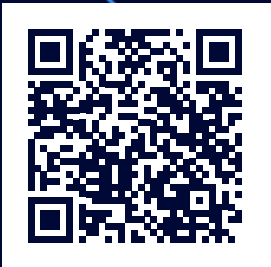


We've combined forward-looking air and hospitality booking data with input from 6,000 travelers across the US, China, India, the UK, France and Germany, along with 500 hotel General Managers and Destination Management Organizations.

What influences where people book, stay and spend?

And where do industry plans match, or miss, those expectations?

 **Get the full report**



2. Connectivity Patterns Shaping Caribbean Travel



Direct vs. Connecting Arrivals

Across the region, 83% of tourist arrivals reach their destination on direct flights, underlining the overall strength of point-to-point connectivity. However, this aggregate figure masks important differences between destinations.

Overseas Tourist Arrivals to the Caribbean between April 2025 and March 2026; vs previous year



Second-tier destinations rely far more heavily on indirect connectivity and hub-based travel. Trinidad and Tobago sees 47% of arrivals entering via a transfer, followed by Guyana (42%) and the Cayman Islands (32%). These destinations depend on a combination of intra-Caribbean connections and major U.S. hubs to sustain demand.

By contrast, top-tier destinations benefit from a much higher proportion of direct arrivals. Aruba and Puerto Rico both record 91% of arrivals via direct flights, reflecting their stronger and more diversified international route networks. This highlights how connectivity to major Caribbean hubs remains crucial—not only for the hubs themselves, but also for secondary destinations that rely on onward travel flows from these entry points.

- Direct
- Transfer

Source: Amadeus Arrivals and Stays

The Role of Hubs and Transfer Markets

Overseas Tourist Arrivals to the Caribbean between April 2025 and March 2026; vs previous year

Panama continues to gain importance as a strategic hub for the Caribbean, particularly for South American travelers. Routes from cities such as Buenos Aires and Santiago increasingly connect through Panama when traveling to destinations like the Dominican Republic, reinforcing the hub's role in linking South America with the Caribbean.

Travelers from South America show a higher reliance on connecting itineraries than those arriving from Europe. As South America is identified as a growing source market, improving air connectivity and reducing transfer friction will be key to unlocking further demand from the region.

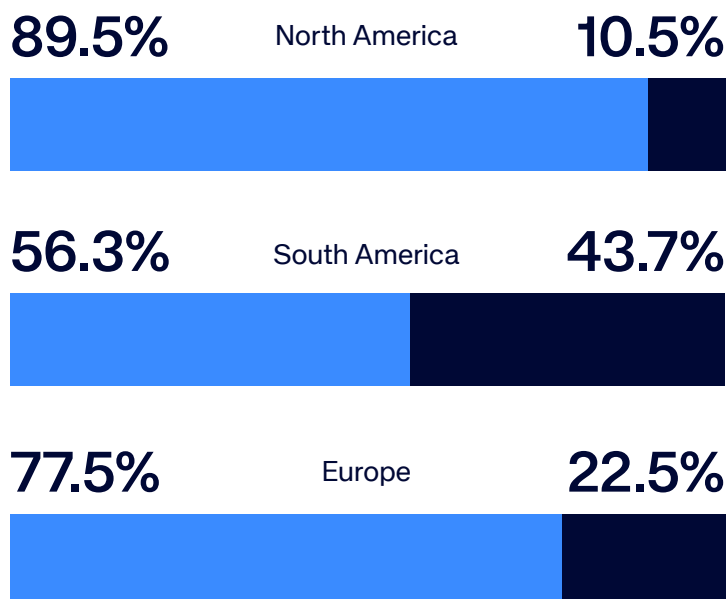
Within Europe, Madrid is becoming an increasingly important gateway to the Caribbean, particularly for connecting travelers from cities such as Barcelona, Milan, and Rome to destinations.

South America

Key hubs for South American markets	% Share of total transfers	P.P. diff vs PY
Panama City	56.1%	+1.8 p.p.
Bogota	13.8%	-0.2 p.p.
Lima	13.2%	-0.9 p.p.

Europe

Key hubs for European markets	% Share of total transfers	P.P. diff vs PY
Madrid	33.6%	+1.1 p.p.
Paris	12.5%	-0.1 p.p.
Miami	4.5%	+0.6 p.p.



Source: Amadeus Arrivals and Stays

Fare Competitiveness and Affordability



Thanks to strong and diversified connectivity with the United States, the Caribbean is well positioned to attract the full spectrum of travelers—from value-conscious leisure and family travel to high-end demand.

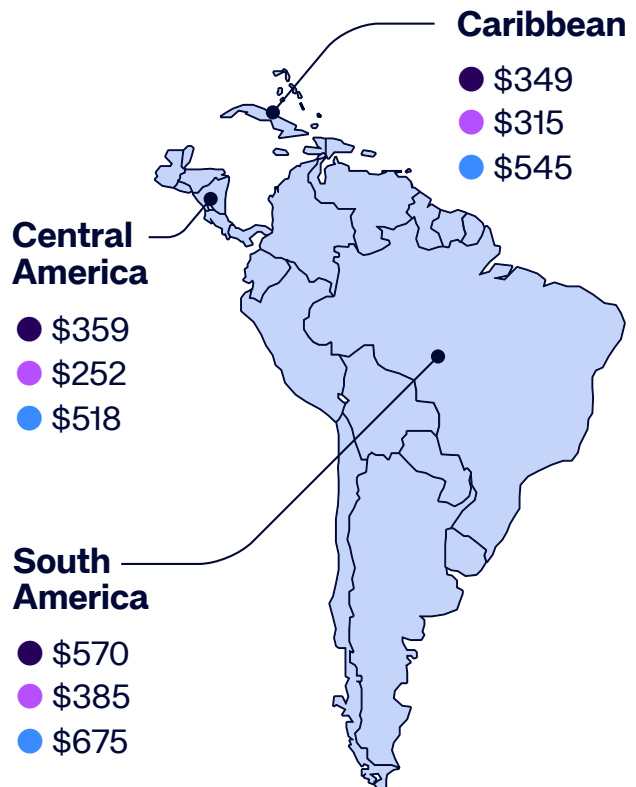
Over the past 12 months, the average economy fare from the U.S. to the Caribbean was \$385, making the region more affordable than South America (\$569) and broadly comparable with Central America (\$387). This reinforces the Caribbean's appeal as an accessible international destination for U.S. travelers.

Fare dynamics vary by gateway. Miami offers the lowest average fares to the Caribbean at \$315, well below the regional average and significantly cheaper than New York (\$349) and San Francisco (\$545).

Traveling from New York to the Caribbean is also more affordable than comparable routes to Central and South America, supporting sustained demand from one of the region's most important long-haul source markets.

Average Economy one-way Fares searched for in 2025 and 2026 for travel between Apr 2025 to Mar 2026; vs previous year

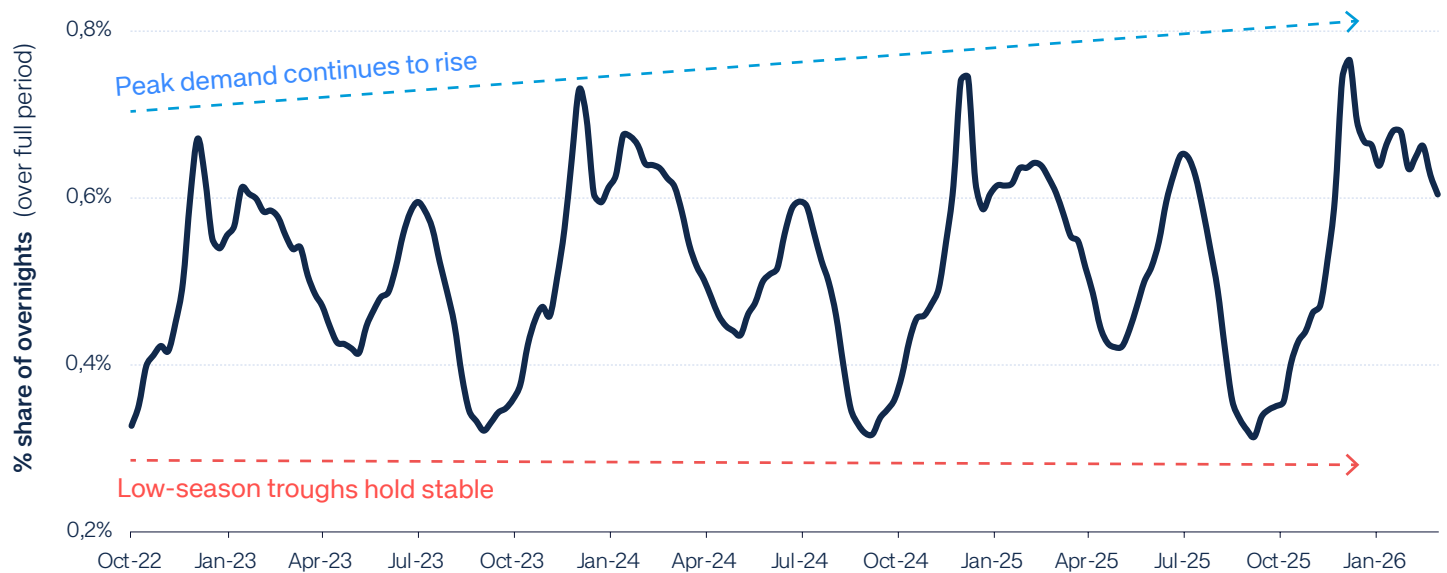
- New York City
- Miami
- San Francisco



Source: Amadeus Air Fares

3. Seasonality Trends and Market Opportunities

Overseas arrivals to the Caribbean between July 2022 and March 2026



Key Insight

High-season demand continues to strengthen, while **low-season** volumes remain static — highlighting clear headroom to unlock incremental growth outside peak months

Tourism demand in the Caribbean has increased steadily since 2022, with total tourist arrivals in 2025 up by +30% compared with 2022. This sustained growth is largely driven by pronounced seasonal peaks, particularly around end-of-year travel periods, which continue to represent the strongest demand window for the region.

At the same time, the low season has remained stable resulting in a more pronounced and consistent seasonality pattern. While peak periods continue to capture the majority of demand, steady off-peak performance presents clear opportunities for destinations to smooth demand throughout the year.

Targeted advertising strategies aimed at stimulating travel outside traditional peak windows can help destinations maximize capacity utilization and reduce seasonality pressures. By aligning marketing spend with origin-specific booking windows and adjusting campaign timing to shoulder and low seasons, destinations

can more effectively influence demand. Collaboration with partners offering creative and performance insights further enables destinations to emphasize the most compelling products and experiences during off-peak periods, informed by historical campaign results.

Seasonal demand patterns are closely linked to holiday-related travel, with key spikes observed around Spring Break, Thanksgiving, and end-of-year holidays. These periods continue to shape both travel planning behavior and air capacity deployment, reinforcing their importance for destination marketing and airline partnership strategies.

Within this context, South American source markets play an increasingly important role. As demand from the region grows, particularly for leisure and holiday travel, South America offers strong potential to support shoulder- and off-peak demand, helping destinations diversify seasonality exposure and capture incremental growth beyond traditional peak travel periods.

Source: Amadeus Arrivals and Stays

Seasonality Index

Contrasting Destination Profiles

Seasonality remains a defining characteristic of tourism performance across the Caribbean, with significant variation at the destination level. The Seasonality Index highlights clear contrasts between destinations with strong peak-driven demand and those that have achieved a more balanced, year-round performance.

Barbados

A Highly Seasonal Destination

Barbados stands out as a destination with a pronounced seasonality pattern, driven largely by a tourism offering that is strongly aligned with traditional peak travel periods. Demand is highly concentrated during the winter high season and end-of-year holidays, while the shoulder and low seasons remain comparatively quieter.

To reduce reliance on peak periods, Barbados could focus on:

- Strengthening off-peak product positioning, including experiences tied to culture, wellness, and events
- Targeting markets with counter seasonal travel patterns, particularly in South America
- Leveraging connectivity to promote shorter stays and flexible travel during shoulder months



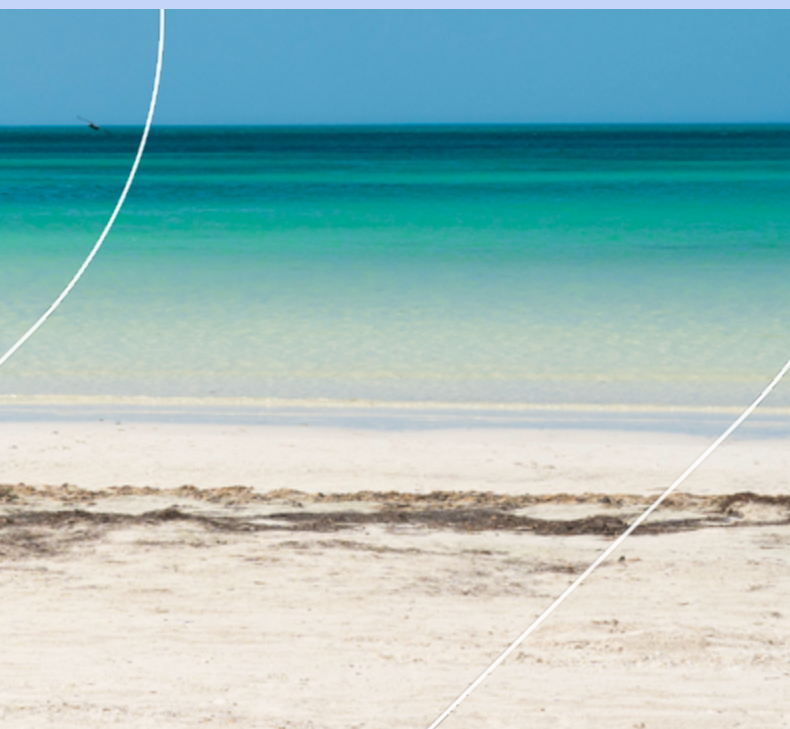
Curaçao

A Model for Stable Seasonality

By contrast, Curaçao emerges as a shining example of seasonality management in the Caribbean. The destination shows a far more stable demand pattern throughout the year, supported by diversified source markets, strong ties to South America, and an offering that appeals beyond traditional peak travel windows.

Curaçao's performance demonstrates how:

- Market diversification, particularly toward South America
- Consistent air connectivity
- Clear destination positioning can substantially reduce dependence on high season demand alone.



Source: Amadeus Destination Gateway

Overseas arrivals to the top 20 Caribbean from April 2025 to March 2026, ranked by seasonality index

Destination	Seasonality Index
Barbados	228
US Virgin Islands	181
Guadeloupe	171
Belize	170
Martinique	138
Sint Maarten	132
Cayman Islands	105
Bermuda	103
Puerto Rico	94
Turks and Caicos Islands	90
Bahamas	82
Dominican Republic	60
Jamaica	58
Antigua and Barbuda	58
Cuba	44
Trinidad and Tobago	43
Saint Lucia	29
Guyana	25
Aruba	24
Curaçao	21

Amadeus Seasonality Index quantifies the degree of seasonality of overnight stays at the destination. A lower index indicates more consistent overnight stays year-round, while a higher index reflects greater variability in weekly overnight stays. An index of zero means zero seasonality, i.e. overnight stays do not vary throughout the year.

A Middle-Ground Profile



Between these two extremes, many Caribbean destinations sit within a middle-ground seasonality profile, benefiting from solid peak demand while also maintaining meaningful activity during shoulder and low seasons. For these destinations, incremental gains can be achieved by applying targeted strategies similar to those seen in Curaçao—particularly in expanding reach among travelers from South America.

Revenue Performance and Seasonal Opportunities (RevPAR)

Hotel performance metrics reinforce the financial impact of seasonality across the Caribbean. During the low season (September and October 2025), Caribbean hotels recorded an average Daily Rate (ADR) of \$224 and an average Revenue per Available Room (RevPAR) of \$125. While RevPAR increased by +2% year over year, performance during this period remains well below peak-season levels, indicating room for further optimization.

Targeting travelers from South America, who show strong propensity to travel during these months, represents a key opportunity to lift both occupancy and RevPAR during the low season.

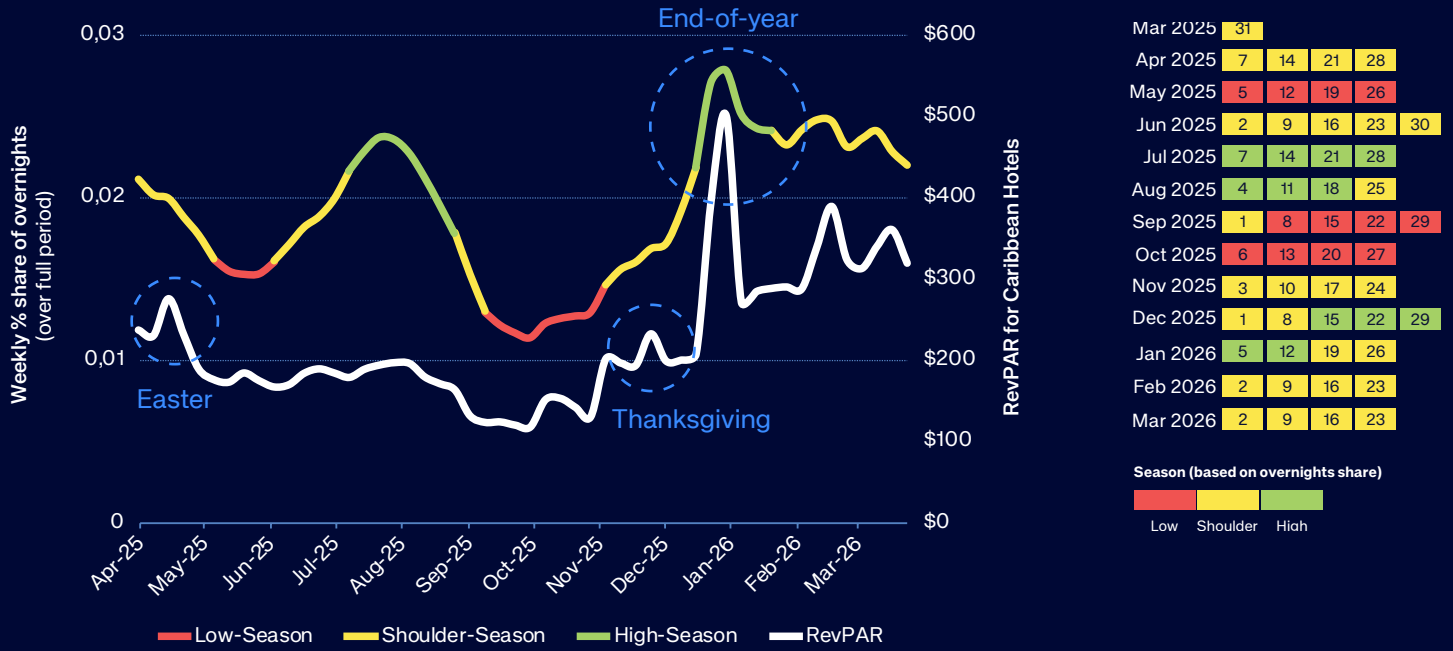
Who Travels During the Low Season?

Low-season tourism in the Caribbean is heavily reliant on South American markets, which continue to play a critical role in sustaining demand outside peak periods.

- Brazil stands out as the fastest-growing low-season source market, with demand increasing by +60%.
- Colombia represents the largest South American source market by share, with low-season demand up +26% year over year.

These trends underline the importance of South America in helping destinations flatten seasonality curves and drive more consistent year-round tourism performance.

Overseas arrivals to the Caribbean between April 2025 and March 2026



While peak periods continue to deliver strong financial results, long-term revenue growth will increasingly depend on improving performance during shoulder and low seasons. Destinations that successfully engage South American travelers and diversify demand beyond traditional peak windows are best positioned to enhance RevPAR stability and overall resilience.

Low-season arrivals by nationality	% Share	YoY
Brazil	1.3%	+60%
Mexico	2.2%	+60%
Peru	1.3%	+34%
Puerto Rico	2.5%	+29%
Colombia	4.4%	+26%
Argentina	2.7%	+25%
Chile	1.0%	+13%
Netherlands	2.1%	+8%



Source: Amadeus Arrivals and Stays
Demand360®
Destination Gateway

4. The Role of Events in Driving Tourism Demand



Major events play a strategic role in shaping tourism demand in the Caribbean, offering destinations a powerful instrument to stimulate visitation, influence traveler profiles, and differentiate themselves in an increasingly competitive global landscape. Beyond driving short-term demand spikes, well-positioned events can extend length of stay, strengthen intra-regional travel, and generate broader economic impact.

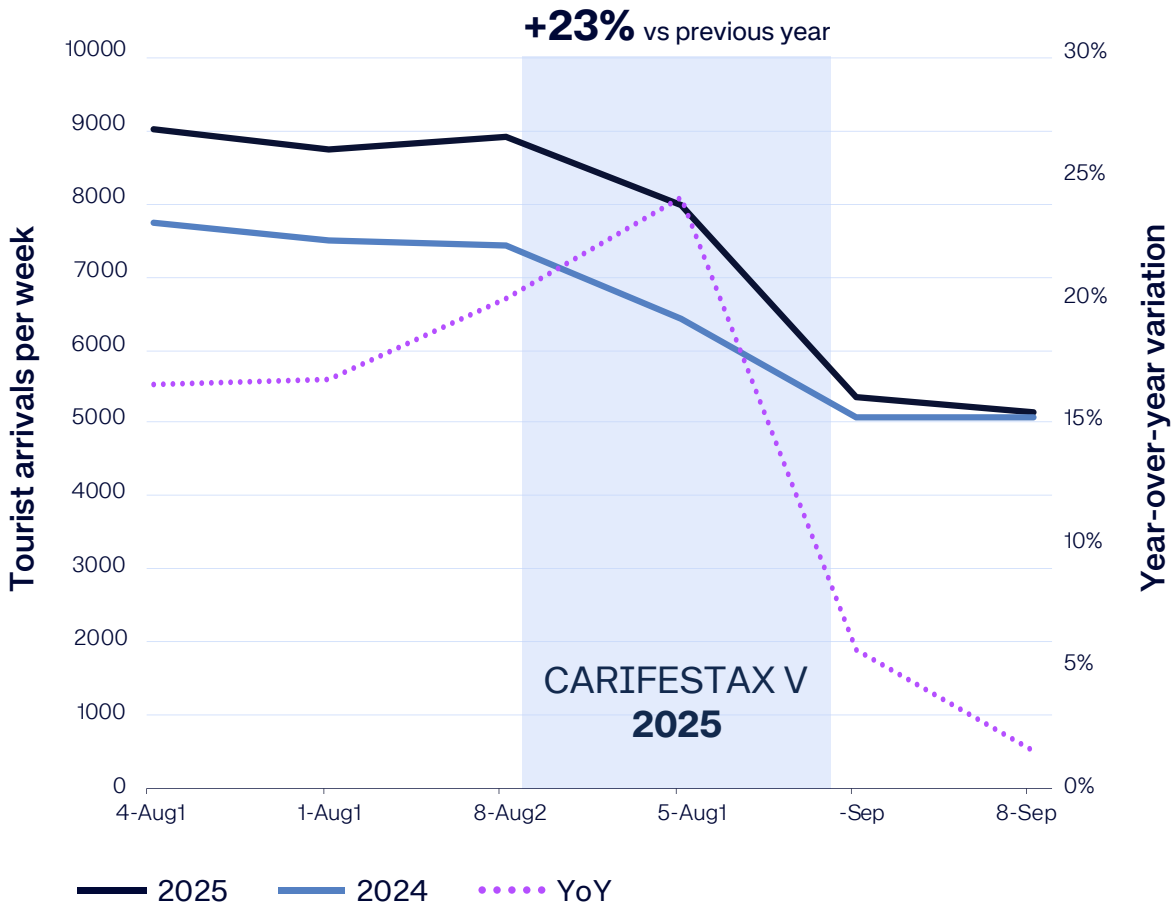
Setting the scene: CARIFESTA XV 2025 in Barbados

CARIFESTA XV, hosted in Barbados in 2025, provides a clear illustration of how large-scale cultural events can influence travel behavior. As the Caribbean’s leading multidisciplinary arts festival, CARIFESTA brings together music, dance, visual arts, theater, and culinary experiences, attracting both regional and international audiences with a strong interest in culture and heritage.

Trip Origin City	% Share*
New York	27.6%
London	16.8%
Port Of Spain	7.1%
Charlotte	4.7%
Miami	4.4%
Georgetown	4.0%
Atlanta	3.3%
Toronto	3.0%
Antigua	2.9%
Saint Lucia	2.3%

* Tourist arrivals during CARIFESTA XV 2025

Overseas arrivals to Barbados between 4 Aug and 14 Sept 2025; vs previous year



Data shows a clear uplift in tourism demand to Barbados during the event period, with arrivals increasing compared with the previous year. This growth was not limited to international long-haul markets: intra-Caribbean travel accounted for 23.3% of tourist arrivals during CARIFESTA XV, an increase of 3.3 percentage points year over year, highlighting the importance of regional mobility in supporting event-driven tourism.

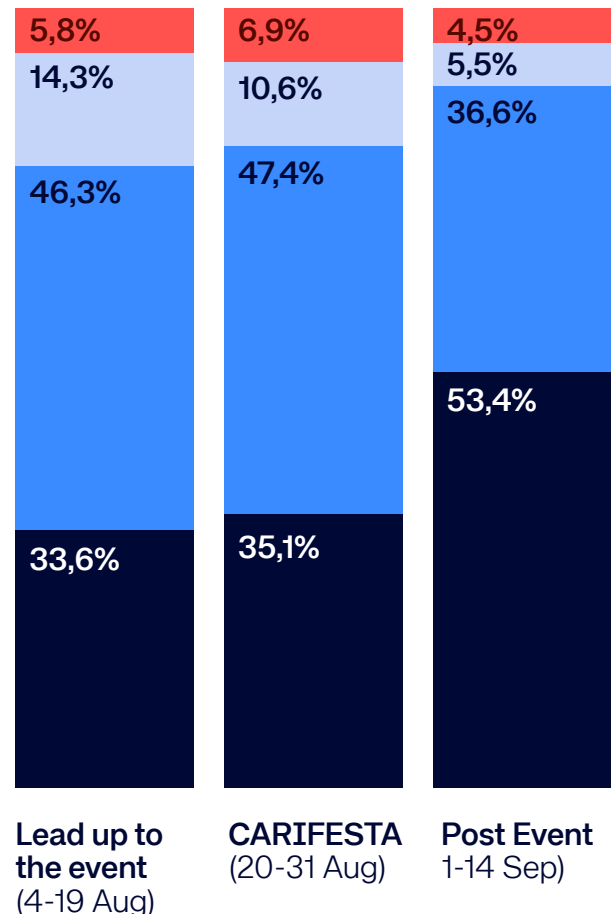
Source: Amadeus Arrivals and Stays

Events influence how people travel— not just whether they travel

One of the most significant impacts of CARIFESTA XV was its effect on length of stay. While events naturally attract visitors during specific dates, data shows that many travelers arrived ahead of the official program, combining the event with leisure travel. During the CARIFESTA period, medium-length stays (4–7 nights) dominated, while longer stays represented a higher share in the lead-up to the event compared with the post-event period.

This pattern underscores a key advantage of event-led tourism: events do not simply increase visitor numbers—they encourage longer stays, amplifying their economic value for destinations.

Length of stay in Barbados from Port of Spain



- Long Stays (14+ nights)
- Extended vacations (8-13 nights)
- Medium Stays (4-7 nights)
- Short Stays (1-3 nights)

Source: Amadeus Arrivals and Stays

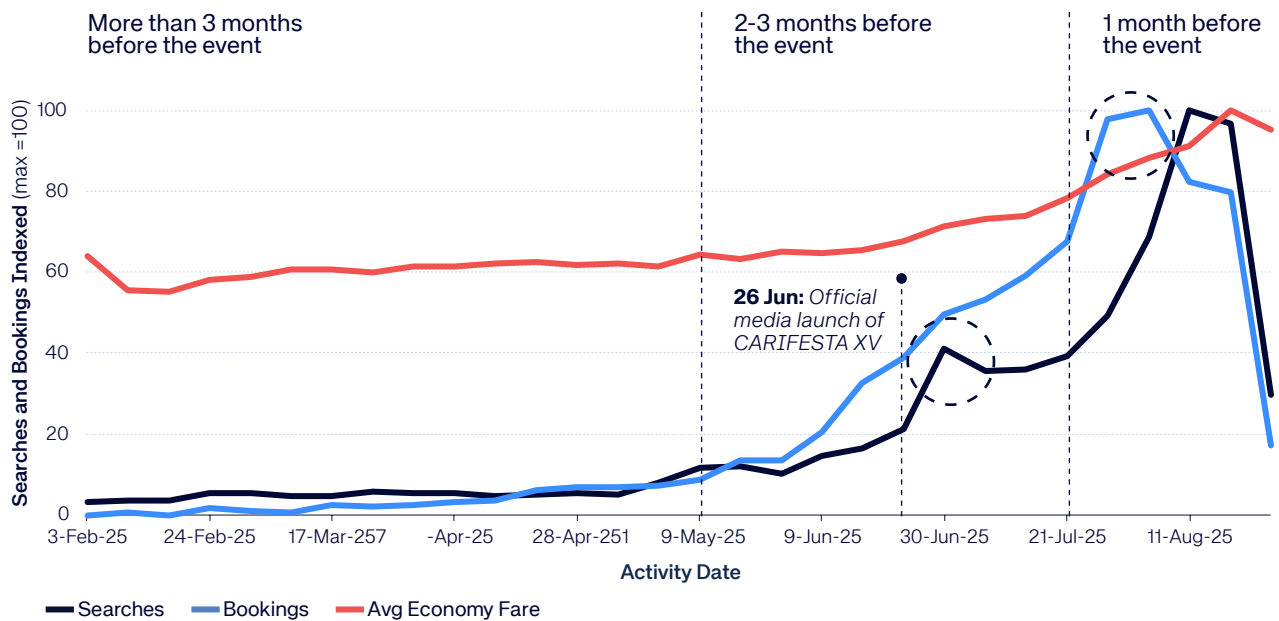
Who travels for events—and when they book

Analysis of booking behavior around CARIFESTA XV reveals distinct booking moments. Intra-Caribbean searches and bookings began building more than three months ahead of the event, with noticeable acceleration following the official media launch on June 26. This reinforces the value of advertising in promoting events, supporting content amplification and re-targeting, and engaging travel sellers, who play

a critical role in shaping bookings at the point of purchase.

Ranking of origin markets during the event period confirms the strong role of regional travel, while also highlighting the opportunity for destinations to target specific markets aligned with cultural, experiential, and repeat visitation profiles.

Flight Searches, Air Bookings and avg. Air Fares for intra-Caribbean arrivals to Barbados between 4 Aug and 14 Sept 2025



CARIFESTA XV 2025 demonstrates that hosting a flagship event can:

- Boost arrivals during targeted periods
- Increase intra-Caribbean travel
- Extend length of stay, particularly when events are positioned as part of a broader leisure experience
- Enable destinations to attract specific visitor segments and differentiate their offering beyond traditional sun and beach tourism

For Caribbean destinations seeking to smooth seasonality, diversify demand, and strengthen regional travel flows, events represent a high impact strategic lever—one that can shape not only when travelers visit, but how long they stay and how they engage with the destination.

Source: Amadeus Flight Searches, Arrivals and Stays & Air Fares

Methodology

Data included in this report was extracted from Amadeus Data Connect, Amadeus Destination Gateway & other Amadeus TI Hospitality solutions

Amadeus Destination Gateway

Amadeus Destination Gateway delivers comprehensive historical and forward-looking air travel data through an intuitive dashboard, empowering destinations to monitor performance by origin market, season, and route.

Amadeus Data Connect

Amadeus Data Connect answers key business questions for destinations with curated datasets. No-code access to an extensive library of prebuilt Data Smarts with seamless integration into your dashboards, allowing destinations to generate custom data insights.

About Amadeus Advertising

Amadeus Advertising helps destinations, hotels and travel brands reach travelers with data-driven, privacy-conscious campaigns across the travel planning journey. By combining travel intent and booking signals with audience activation and measurement, we enable partners to target high-potential segments, optimize media investment around key booking windows, and convert inspiration into bookings.

Unify the world's travel data to enable smarter decisions

Amadeus Destination Gateway

Facilitate comprehensive data visualization for everyone in your organization.

Amadeus Destination Gateway delivers comprehensive historical and forward-looking air travel data, empowering destinations to monitor performance by origin market, season, and route.



Amadeus Data Connect

Empower data-savvy analysts: seamlessly integrate data with your own BI and programming tools. No-code access to an extensive library of prebuilt Data Smarts with seamless integration into your dashboards, allowing you to generate custom insights.



Discover what's driving travel to your destination



Get your free
teaser report

For further information, visit us at
amadeus-hospitality.com
or speak to your Amadeus Account Manager today.

Find us on:



Photos: supplied | © Amadeus IT Group
and its affiliates and subsidiaries