

The Latin American Experiences Traveler

How travelers in Argentina, Brazil and Mexico plan, book and experience tours, activities and attractions

September 2026

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ARIVAL Phocuswright

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Study Methodology

Arival surveyed 1,200 qualifying leisure travelers from Argentina, Brazil and Mexico in spring 2026 to understand how they discover, plan, book and experience tours, activities and attractions.

A qualifying traveler is an adult of 18 or older who has:

- taken a trip at least 100 miles from home in past year for leisure;
- stayed overnight on a trip;
- booked and participated in a qualifying tour, activity, attraction or experience.

Countries surveyed

AR Argentina

BR Brazil

MX Mexico





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* Machu Picchu Day Trip



Executive Summary & Key Findings

1. Travel Demand Remains Strong

Latin American (LATAM) travelers remain highly motivated to travel (compared to more hesitancy among U.S. and European travelers). Rising costs are the primary constraint, making value and promotions especially important.

2. Family Comes First

LATAM travel centers on relaxation, family time and shared memories. Food and culture also matter, while authenticity and off-the-beaten-path experiences are secondary motivations.

3. Experiences Shape Destination Choice

Experiences are not afterthoughts. Attractions, tours, food and activities impact destination selection, particularly in Brazil and Mexico.



4. Regional Strategy. Local Execution.

LATAM travelers have more in common than differences. The biggest variations are in digital adoption, planning, spending and booking behavior, requiring local adaptation rather than fundamentally different strategies.

5. Classic Experiences Still Win

Sightseeing, cultural attractions, landmarks, food experiences and outdoor excursions dominate across all markets and age groups. Immersive, local-host and niche products remain secondary.

6. Young Travelers Drive Growth

LATAM travelers under 35 book more experiences and spend more, but unlike younger travelers in the U.S. and Europe, they continue to embrace traditional sightseeing, cultural and tourism experiences.



7. Attractions Anchor Trips; Tours Create Memories

Attractions (especially iconic sites) are planned earlier and influence destination choice, while tours are more important to travelers and often define the trip itself.

8. AI Is Reshaping Discovery

Seven in 10 LATAM travelers now use AI for trip planning, with even higher adoption among younger and affluent travelers. AI is already influencing destination selection, inspiration and travel research, making it one of the most important new discovery channels in travel.



9. Discovery Is Fragmented; Human-Led Trust Drives Decision-Making

Travelers discover experiences through many digital sources, but trust is pivotal to booking. Reviews, recommendations, reputation all play a role. Technology changes discovery, but trust still drives conversion.

10. Premium Upgrades Create Revenue Opportunities

Travelers are willing to pay for convenience and enhanced experiences — particularly younger, affluent and Mexican travelers.





The Latin American Experiences Traveler

Who LATAM travelers are, what motivates them,
and how they travel

Brazil Has the Region's Most Frequent Travelers

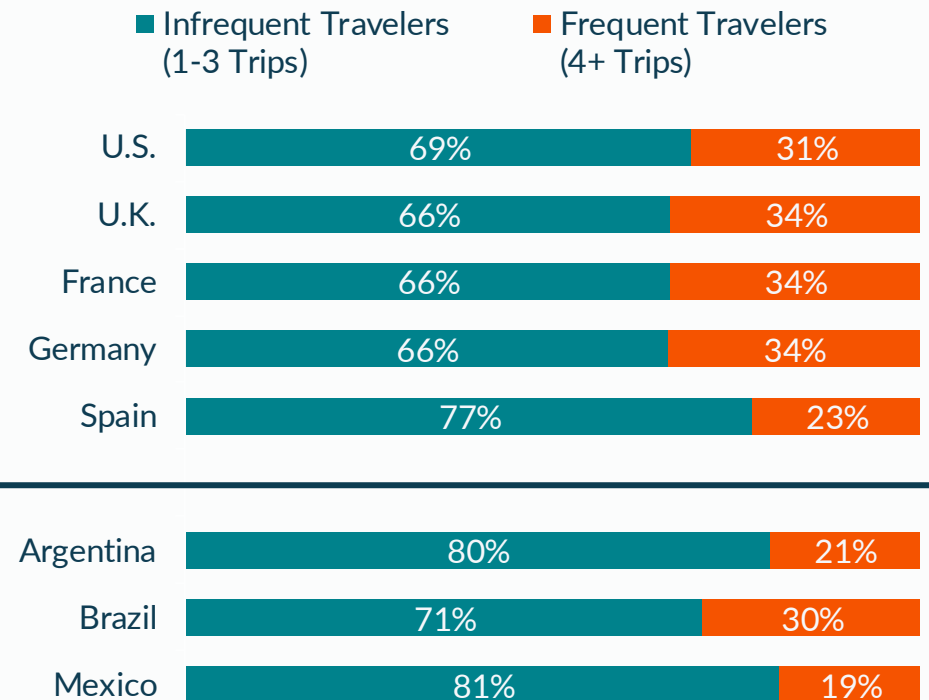
Most LATAM travelers take 1-3 leisure trips per year, making the region primarily an occasional traveler market.

Brazil stands apart, with nearly 30% taking four or more trips annually — closer to U.S. and European travel patterns.

Argentina and Mexico have smaller populations of frequent travelers, reinforcing the importance of value-oriented products and pricing.

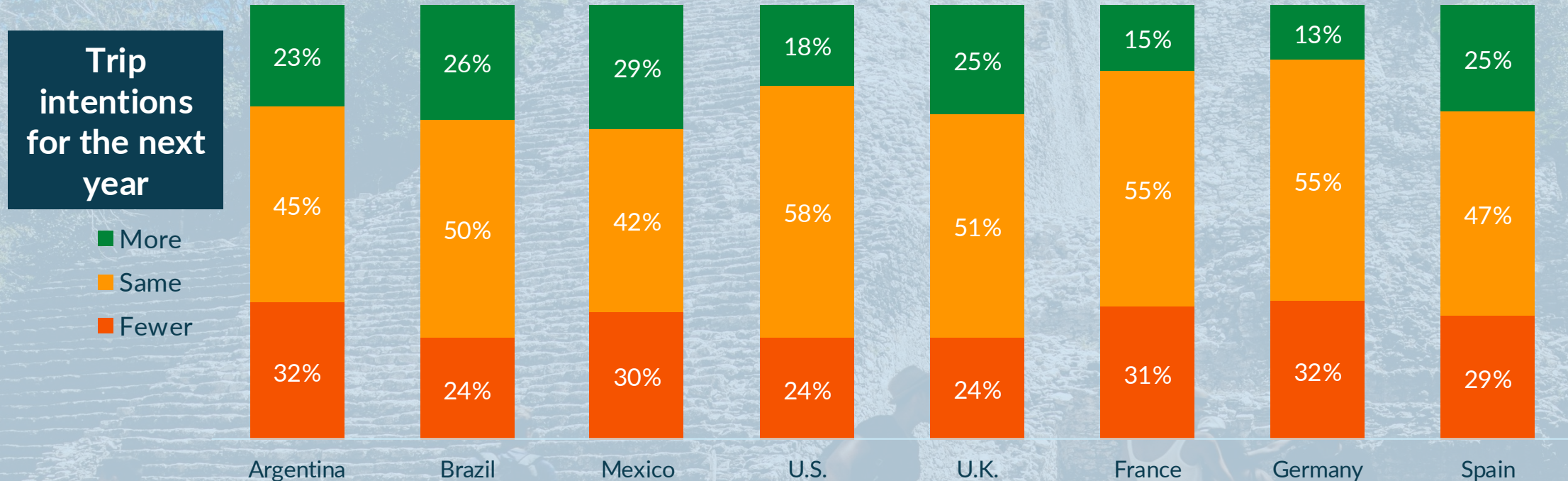
• More occasional travelers mean fewer buying moments. Winning each trip — and creating reasons to return — is critical.

Traveler Population by Number of Trips



LATAM Travelers Remain Optimistic About Travel

LATAM travelers are more likely than U.S. and European travelers to plan more leisure trips over the next year, with Brazil and Mexico showing the strongest travel optimism despite broader economic uncertainty.



Travel Demand Is Strong; Price Is the Barrier

Travel demand remains resilient across Argentina, Brazil and Mexico. Amid global economic uncertainty and rising costs, LATAM travelers' ambition to travel is strong.

However, price is a real obstacle. Ever rising travel costs is the top reason cited among travelers expecting to take fewer trips. Meanwhile, better deals and discounts are the strongest catalysts for those planning to take more trips.

These patterns are consistent across markets and age groups. Price sensitivity is a key issue affecting travel decisions across the region.

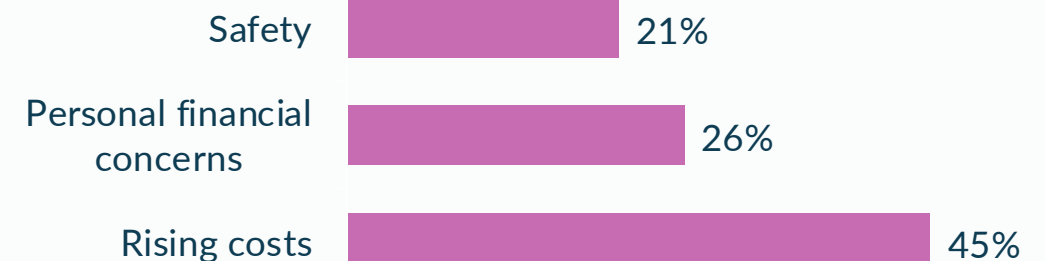
•Value — not just a low price — is a key differentiator. Bundles, inclusive pricing and targeted promotions may be more effective than across-the-board discounting.

Drivers for Changing Travel Plans

Why more trips



Why fewer trips



LATAM Travelers Put Enjoyment, Family Time First

Relaxation and family time are the top travel motivations across all three markets (see next page). Food, culture and iconic sights are important secondary motivators.

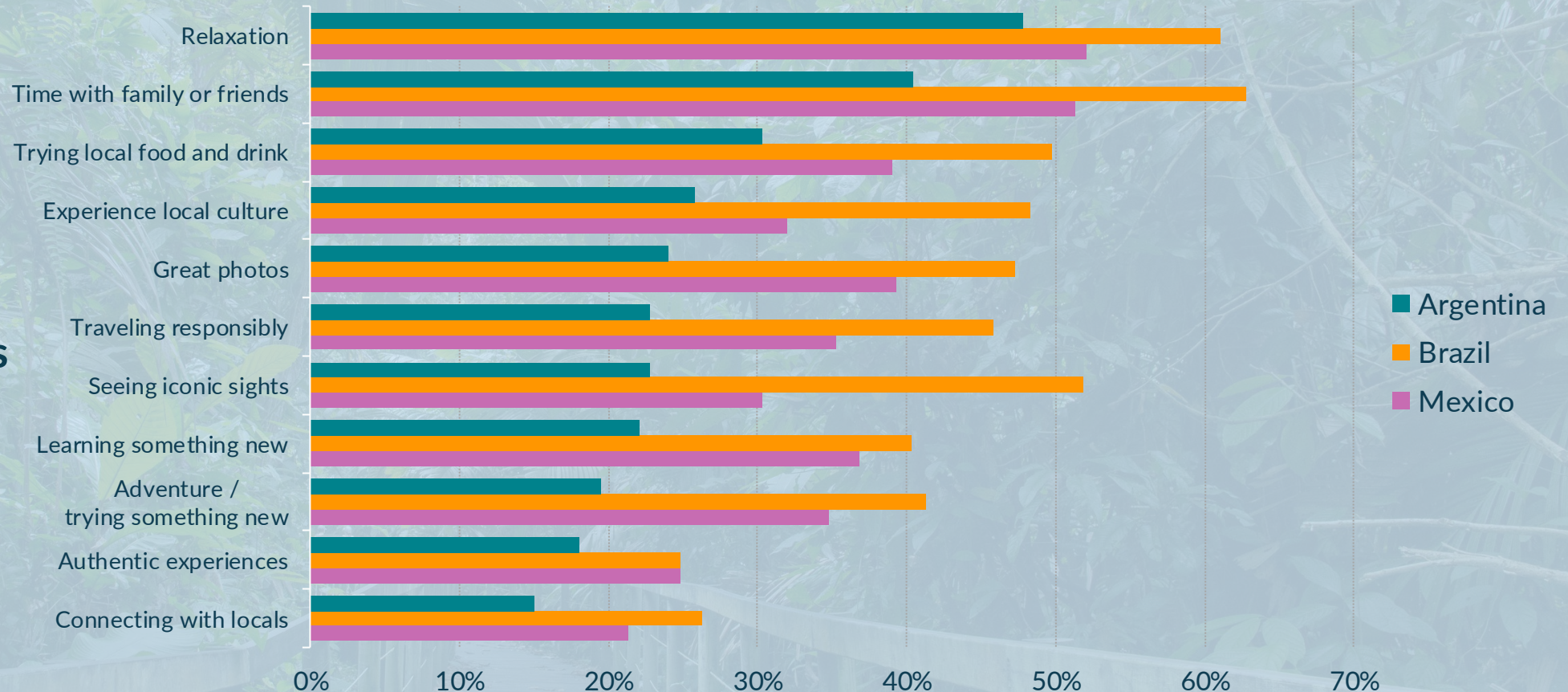
Personal growth, authenticity and hidden gems – key motivations which have been shaping market demand among U.S. and European travelers – rank much lower among LATAM travelers, who are more interested in traditional leisure holiday experiences.

Operators should design and market experiences around shared enjoyment rather than personal transformation. Emphasize experiences that are easy to enjoy with friends and family and position them as enhancing a relaxing vacation.



What Drives Travel: Relaxation, Family Time

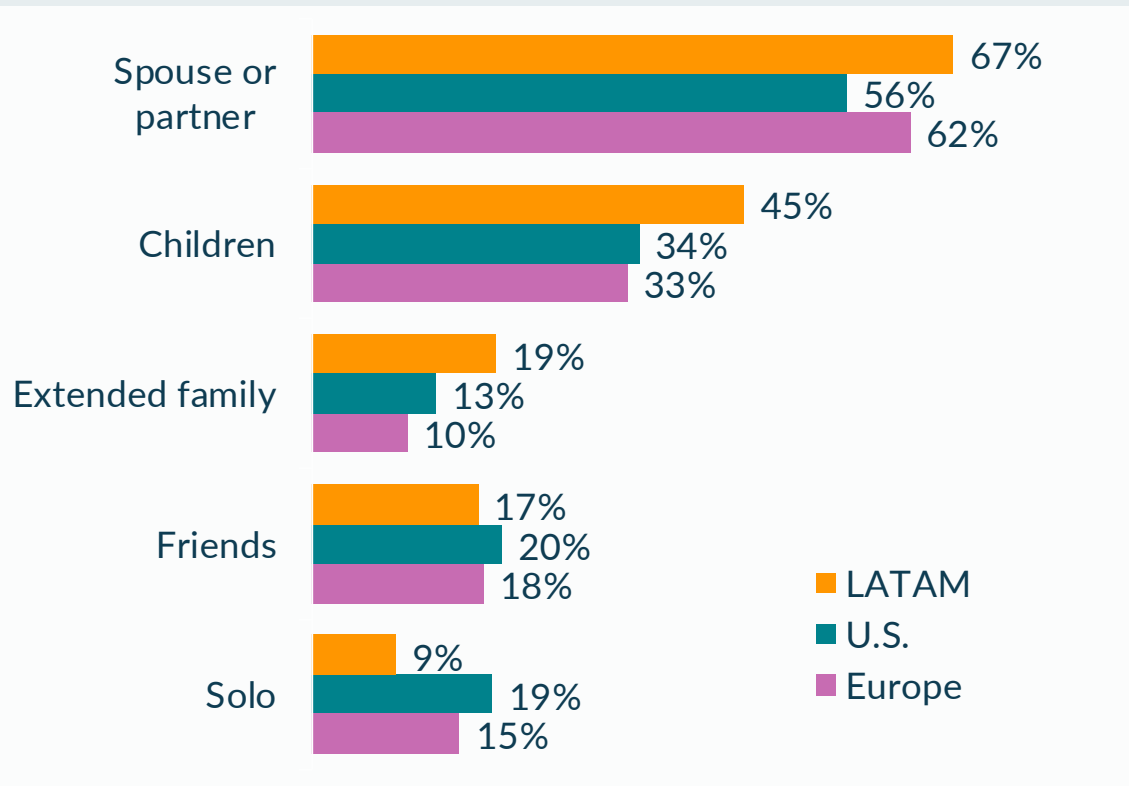
Why travel? Top trip motivations



Family Travel Sets LATAM Apart

Travel Party Trends

With whom did you travel on your last trip?



LATAM travelers are much more likely to travel with family than travelers from the U.S. or Europe:

- Nearly half of LATAM travelers took a trip with children, vs. one in three from the U.S. and Europe.
- LATAM travelers are twice as likely to take a trip with extended family.
- Solo travel is also far less common across the region.
- Time together is both a primary travel motivation and a defining travel behavior.

Design and market experiences for families and multi-generational groups. Shared experiences — not individual adventures — should be central to product design and merchandising.

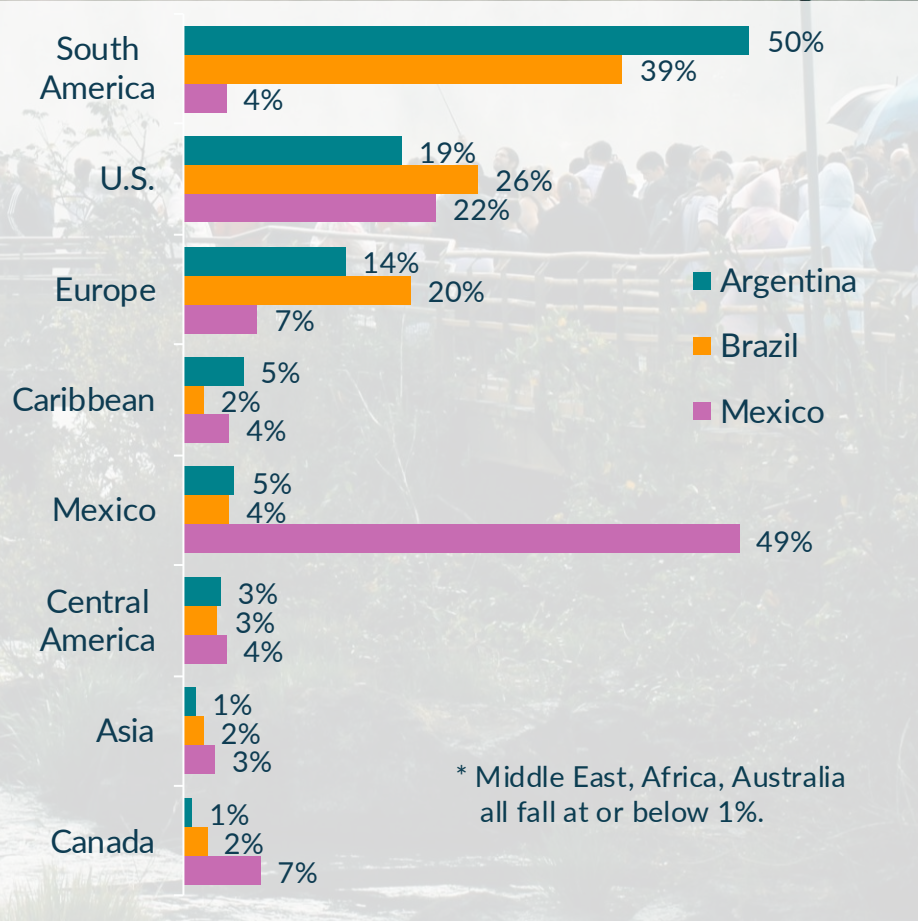
Most LATAM Travel Is Domestic or Regional

Domestic and regional travel, including North America, account for the vast majority of trips across all three markets.

When traveling overseas, Europe remains the leading long-haul destination, with language playing an important role (Spain for Argentina and Mexico; Portugal for Brazil).

Brazilian travelers are the most experienced and international travelers. They are more likely to travel abroad and to long-haul destinations, they take more trips, and they spend more on each trip (see the next page).

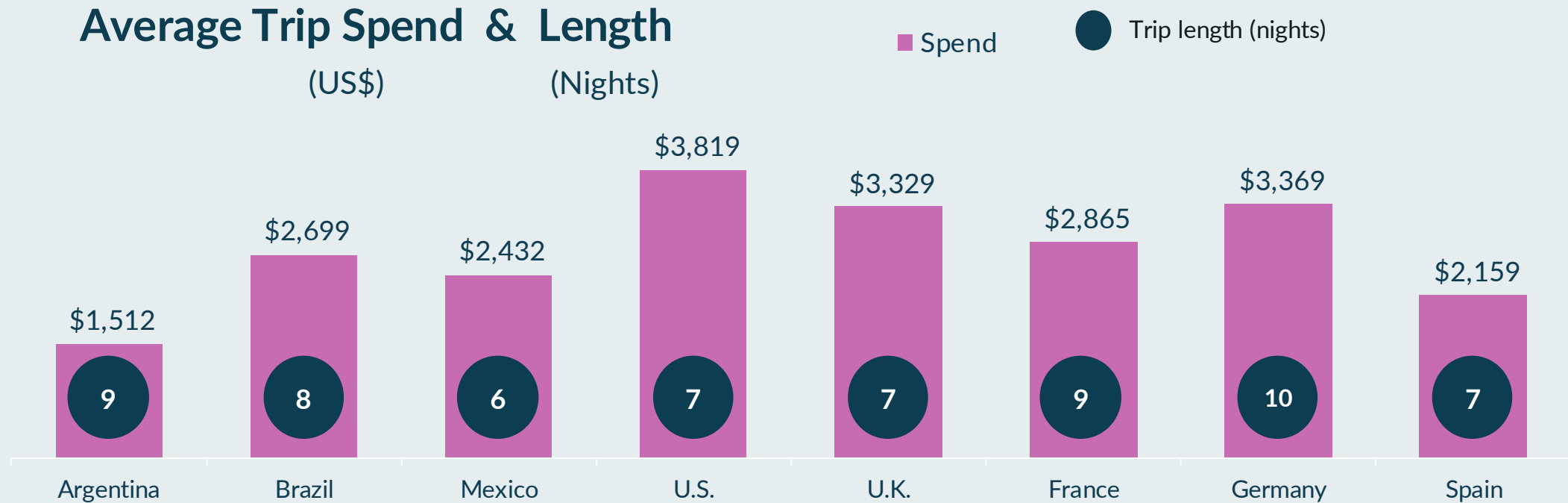
Where They Went*



LATAM Travelers Stay Longer but Spend Less

Travelers from Argentina and Brazil take the longest trips (8–9 nights), but overall trip spending remains below U.S. and European travelers, highlighting the region's greater price sensitivity.

Longer stays create additional opportunities for tours and attractions, but providers should emphasize value and affordability.



Experiences Shape the Trip

How experiences impact the destination decision, define the trip, and create commercial opportunity

Experiences Shape the Destination Decision

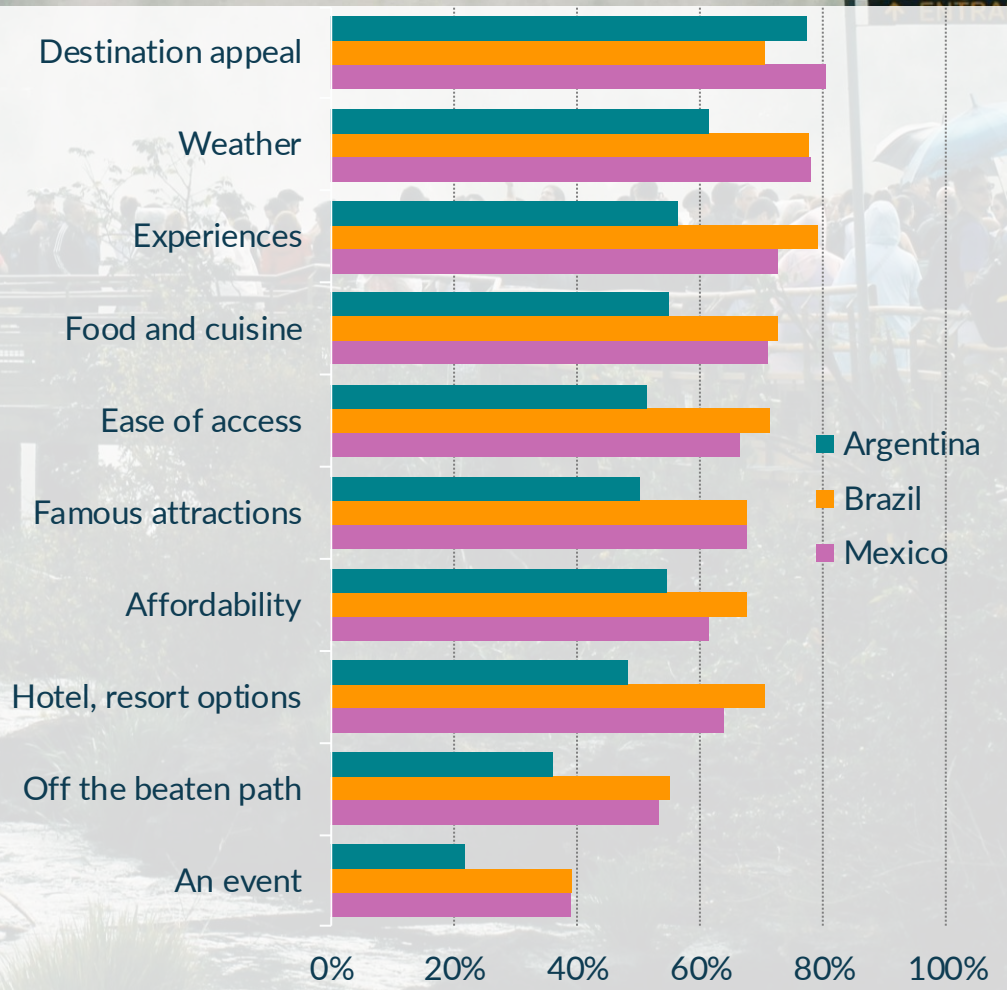
Destination appeal remains the leading driver, but experiences, attractions, food and tours are among the most influential factors when travelers choose where to go.

Brazilian and Mexican travelers place the most importance on experiences when selecting destinations.

Classic experiences outweigh niche ones.

While "off-the-beaten-path" travel and more immersive experiences have shaped the narrative for the U.S. and Europe markets, LATAM travelers of all ages remain focused on iconic attractions and destination highlights. They take fewer trips, which makes each trip – and seeing “must-see” sites and attractions –much more important.

Destination Selection Drivers

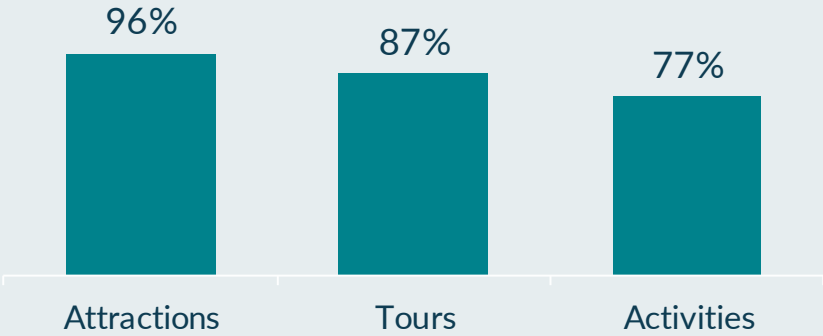




Experiences: Everyone Does Them

Experience participation is very high across LATAM. The vast majority of travelers visit attractions, take tours, or participate in activities during their trip. Attractions have the broadest reach: nearly all travelers visit at least one attraction, while tours and activities also enjoy high adoption across the region.

The Percent of LATAM Travelers Who Do at Least One of Tour, Activity or Attraction



Three Markets, Three Travel Profiles

LATAM travelers are active experience buyers, but booking behavior varies significantly by market.

Brazilian travelers book the most experiences, making it the region's highest-volume market.

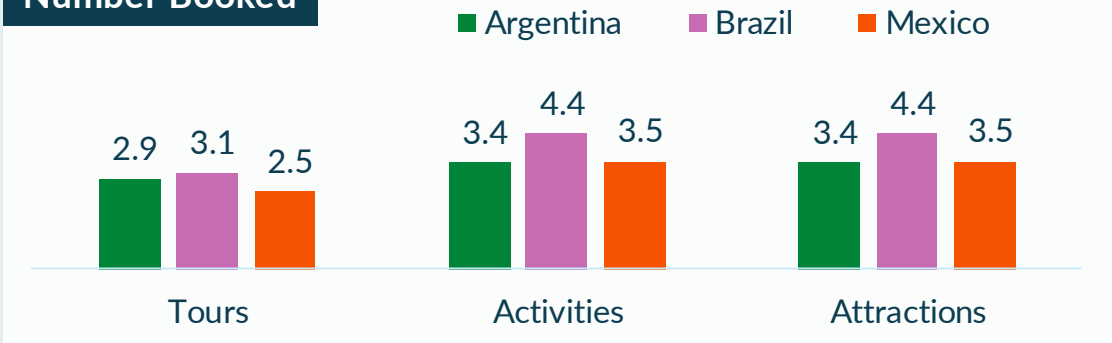
Mexicans spend the most per experience, creating the strongest premium revenue opportunity.

Argentinian travelers participate actively but spend much less per experience. Ongoing economic and currency volatility are likely contributing factors; value-led pricing and offers are especially important.

For operators and resellers: differentiate by market. Emphasize volume and cross-selling in Brazil, premium experiences in Mexico, and value-focused offers and bundles in Argentina.

Experiences Booking Trends by Country

Number Booked



Spend per person (US\$)



Younger Travelers Drive Experience Growth

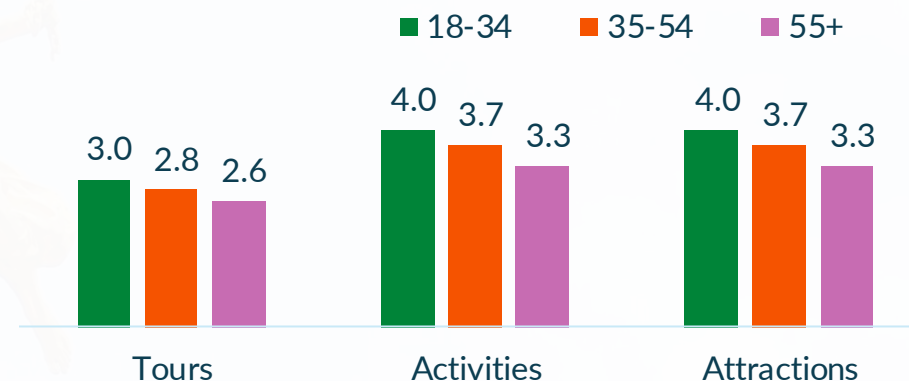
Younger LATAM travelers are the most active consumers of experiences, but travelers of all ages book a substantial number of tours, activities and attractions.

- **Travelers under 35 book the most** experiences and spend the most across every category.
- **The largest spending gap is in attractions**, where younger travelers spend significantly more than travelers 55 and older.
- **Demand remains strong across all age groups**, with older travelers continuing to book multiple tours and attractions.

Younger travelers represent the biggest growth opportunity. Focus on upselling, premium experiences and multi-experience packages for travelers under 35, while emphasizing classic sightseeing and cultural experiences for all ages.

Experiences Booking Trends by Age

Number Booked



Spend per person (US\$)





86%

Satisfied with attractions

63% Very satisfied



87%

Satisfied with tours

58% Very satisfied



82%

Rate attractions as good or excellent value

2% Poor or very poor value



80%

Rate tours as good or excellent value

3% Poor or very poor value

Tours and Attractions Deliver High Satisfaction and Value

Tours and attractions receive exceptionally high satisfaction ratings across all LATAM markets:

- **More than eight in 10 travelers report being satisfied** with both tours and attractions across all three markets.
- **Perceived value for money is equally strong**, with only a small minority (low single digits) expressing dissatisfaction.
- **Satisfaction remains consistently high across age groups.** This underscores the broad appeal of experiences.

Experiences are the emotional heart of the trip. Attractions drive visitation, tours create memories, and consistently high satisfaction creates a powerful platform for repeat bookings, referrals, positive reviews, and higher-value merchandising.



The Experiences Travelers Want

Understanding which experiences travelers choose — and why



The Classics Still Win

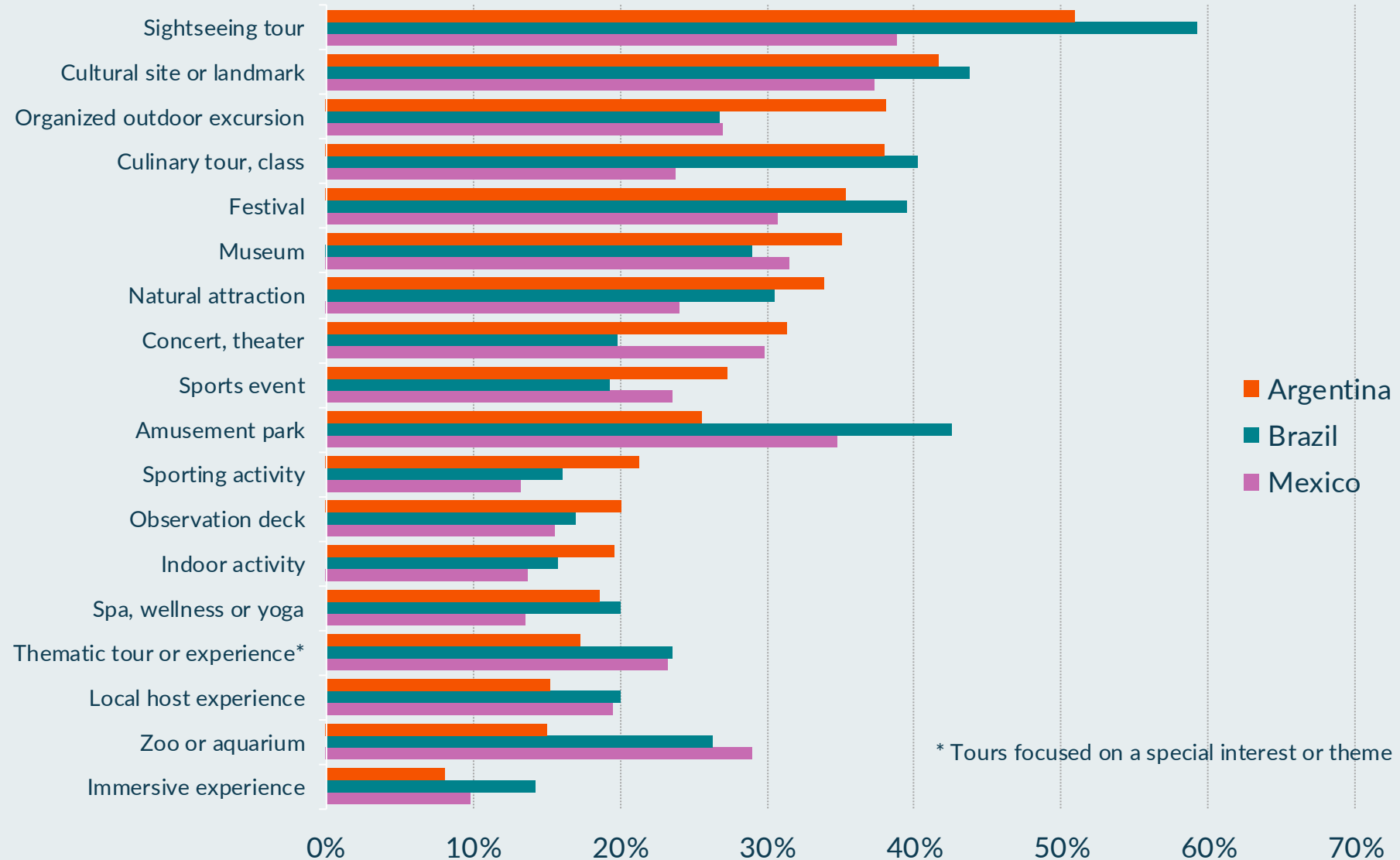
LATAM travelers favor classic travel experiences centered on sightseeing, cultural attractions, food and outdoor exploration (see next page for detailed chart).

- Sightseeing tours, cultural attractions and iconic landmarks are most popular across all three markets.
- Food experiences and outdoor excursions are also highly popular, particularly in Brazil and Mexico.
- Family-oriented attractions, such as amusement parks and zoos, are especially important in Mexico.
- Immersive, local-host and niche experiences remain secondary, despite the industry's growing focus on these products in the U.S. and Europe.

Classic tourism products remain the commercial backbone of the LATAM market. Innovation should complement — but not replace — the core sightseeing and cultural portfolio.



Experience Participation by Type and Market





Classic Experiences Appeal Across Countries & Generations

LATAM travelers of all ages participate in many of the same core experiences. Sightseeing tours and attractions ranking among the most popular across every age group. (See next page.)

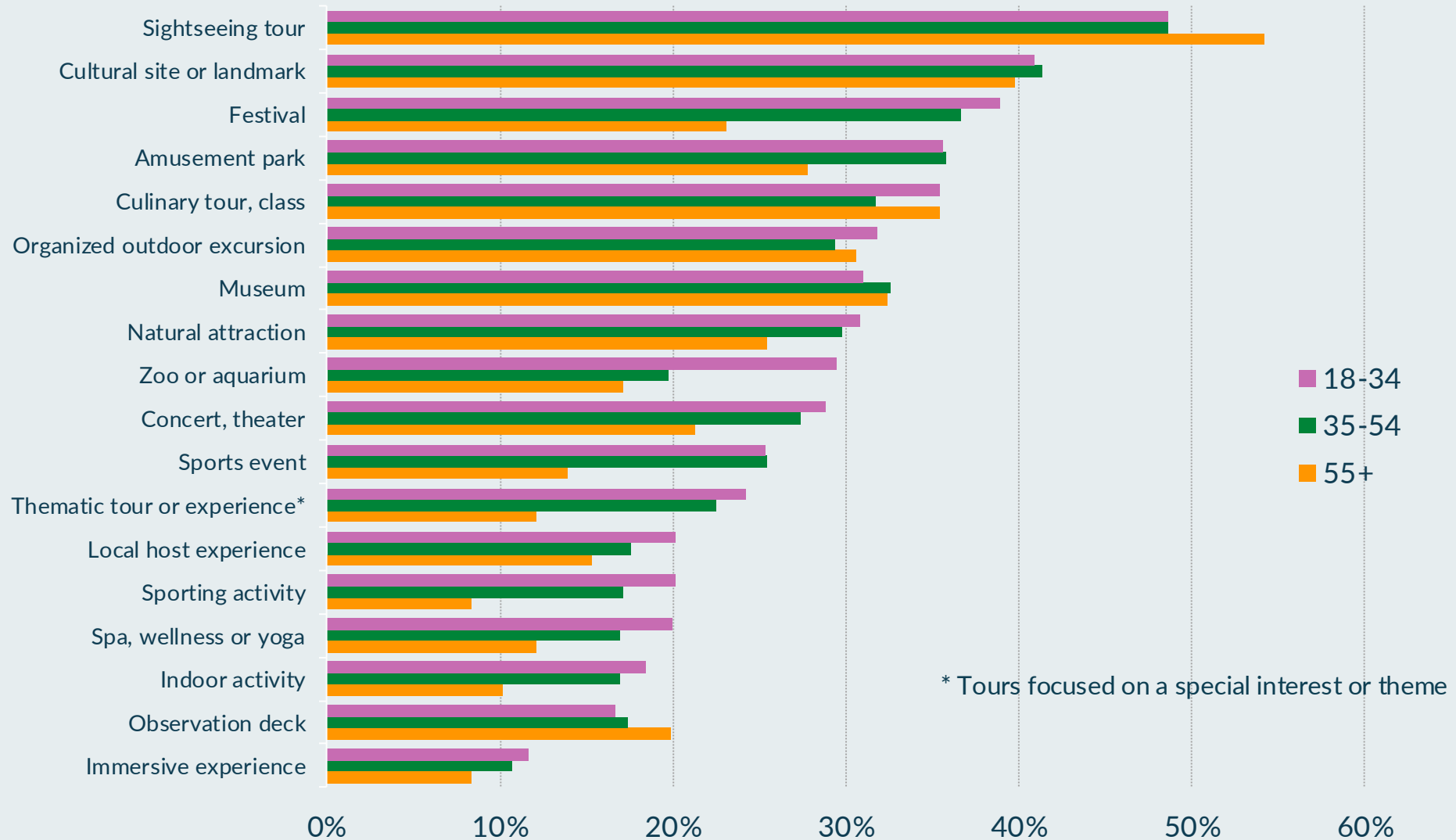
While younger travelers in the U.S. and Europe are showing more interest in alternative, immersive cultural experiences, LATAM's younger travelers still embrace traditional tourism products while supplementing them with entertainment and social activities.

18-34-year-old travelers are more likely to participate in festivals, sports events, local host experiences and immersive activities.

35-54-year-old travelers show the broadest participation across experience types, leading in categories such as culinary experiences, outdoor excursions and family-oriented attractions.

Age influences how travelers enhance a trip, but not the core experiences they seek. Sightseeing, culture and food remain the foundation of experience demand across generations of LATAM travelers.

Experience Participation by Type and Age



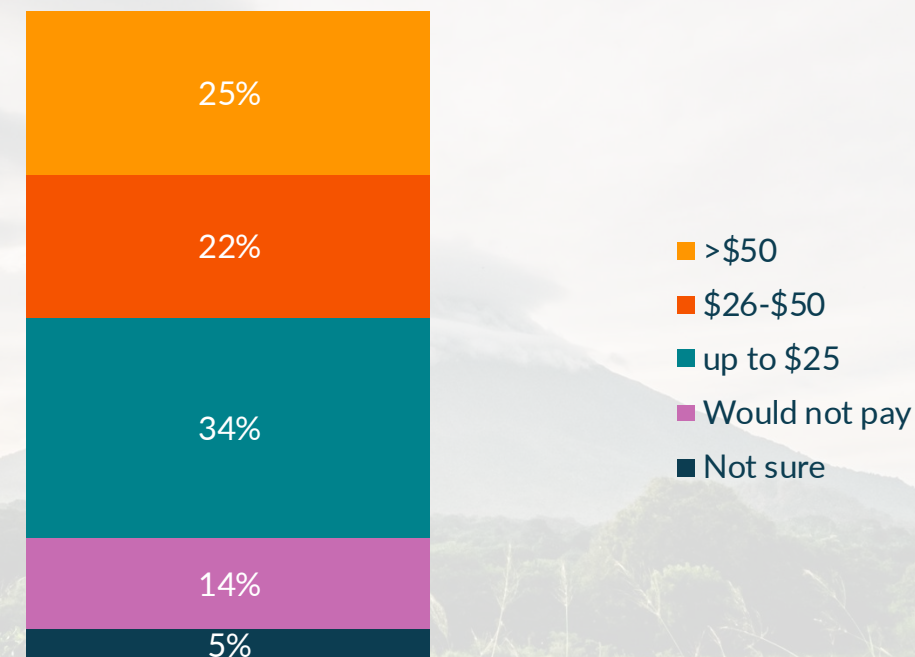
Travelers Will Pay More for Better Experiences

Traveler interest in upgrades varies significantly by market and traveler segment, but there is a clear pattern: most travelers are willing to pay for upgrades that enhance convenience, comfort, or the overall experience of attractions and tours.**

- **Premium food & beverage and priority access / skip-the-line** are the most attractive upgrade across both tours and attractions.
- **Mexico over-indexes** on nearly every upgrade category, while **Argentina shows much lower interest** and willingness to pay.
- **Younger travelers (18-34) and more affluent travelers** demonstrate the strongest interest in upgrades.
- **Merchandise generates weak interest** across markets and demographic groups.

Focus on upgrades that improve the experience itself – not on additional products. Priority access, premium F&B, cancellation insurance, and curated premium experiences could deliver the strongest opportunity, particularly among younger, affluent travelers.

Traveler Willingness to Pay for Attraction Upgrades*



Upgrade Interest

* Chart reflects the percent of travelers willing to pay – and the amount – for attraction upsells. Results reflect the average across seven upsell product categories.

** While the results shown here are for attractions, results are similar for tour upgrades.



70%

LATAM travelers used **AI**
for trip planning

The Traveler Booking Journey

How LATAM travelers discover,
plan and book

Travelers Discover Experiences Everywhere

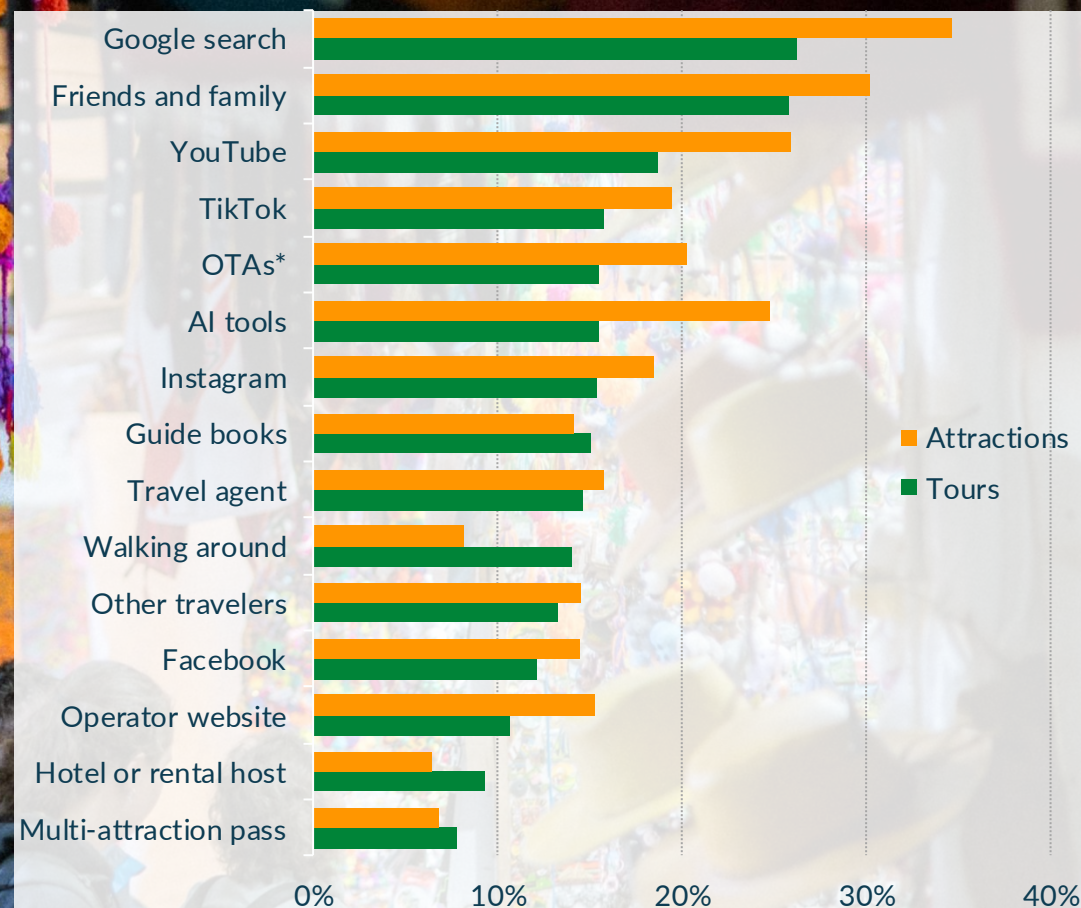
Digital channels dominate discovery in LATAM, but traditional channels such as travel agents and guidebooks remain relevant.

- **Discovery is multi-channel.** Google remains on top, but travelers use a mix of digital, off-line and personal channels.
- **AI has already become a mainstream discovery tool**, particularly among younger travelers and Brazilians.
- **Offline channels still matter.** Travel agents and guidebooks remain relevant despite rapid digital adoption.

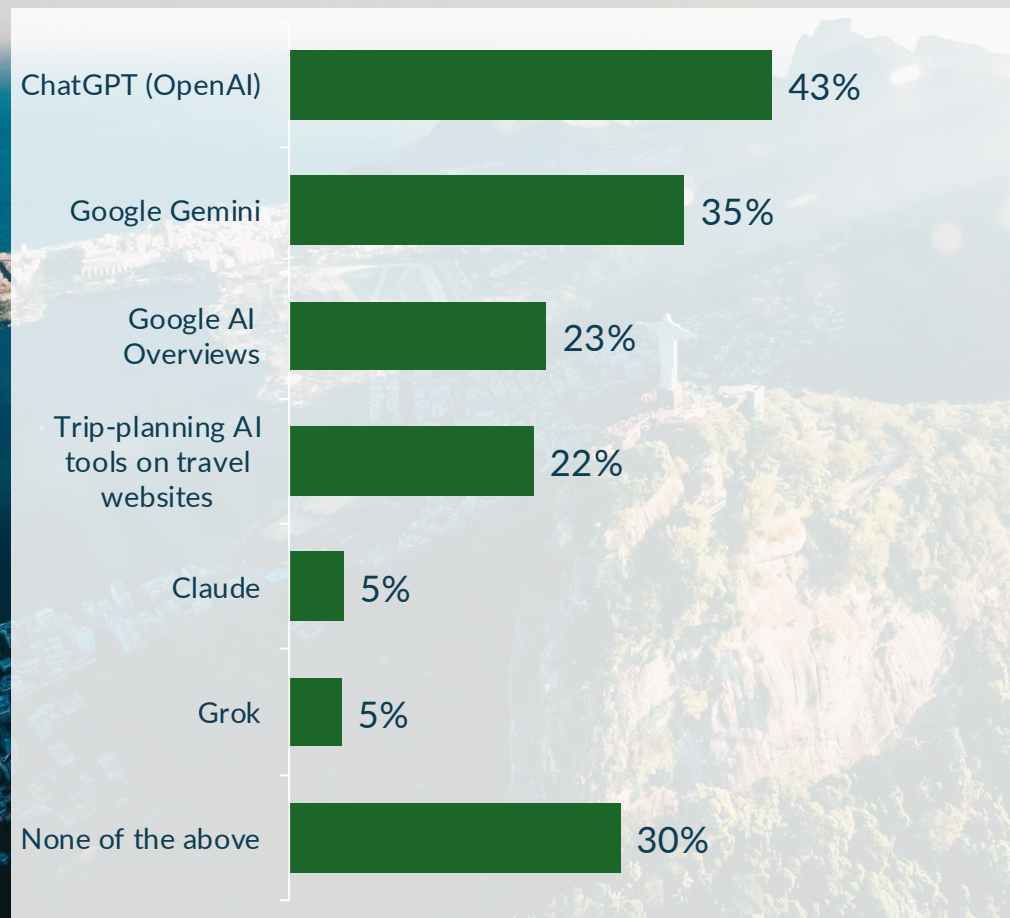
Operators and providers must optimize for discovery: SEO, AI visibility, YouTube and social content alongside OTA* and travel trade partnerships are critical.

* Online travel agencies, such as BestDay, Civitatis, Despegar, etc.

How Travelers Plan Tours, Attractions



Use of AI to Plan Trip (all LATAM travelers)



AI Is Already Mainstream

AI has rapidly entered the travel planning process across LATAM, with 70% of travelers reporting they used AI to help plan a trip. Adoption is even higher among younger travelers (80%) and affluent travelers (78%).

ChatGPT leads consumer awareness, while Google's AI ecosystem (Gemini and AI Overviews) also plays a significant role. Travel brands are beginning to participate as well, with more than one in five travelers using AI-powered planning tools on travel websites.

The findings suggest AI is already becoming an important channel for travel discovery.

LATAM Travelers Who Use AI

All Travelers	18-34	Affluent (HHI >\$150K)
70%	80%	78%

AI Shapes the Journey – but Not Yet Booking

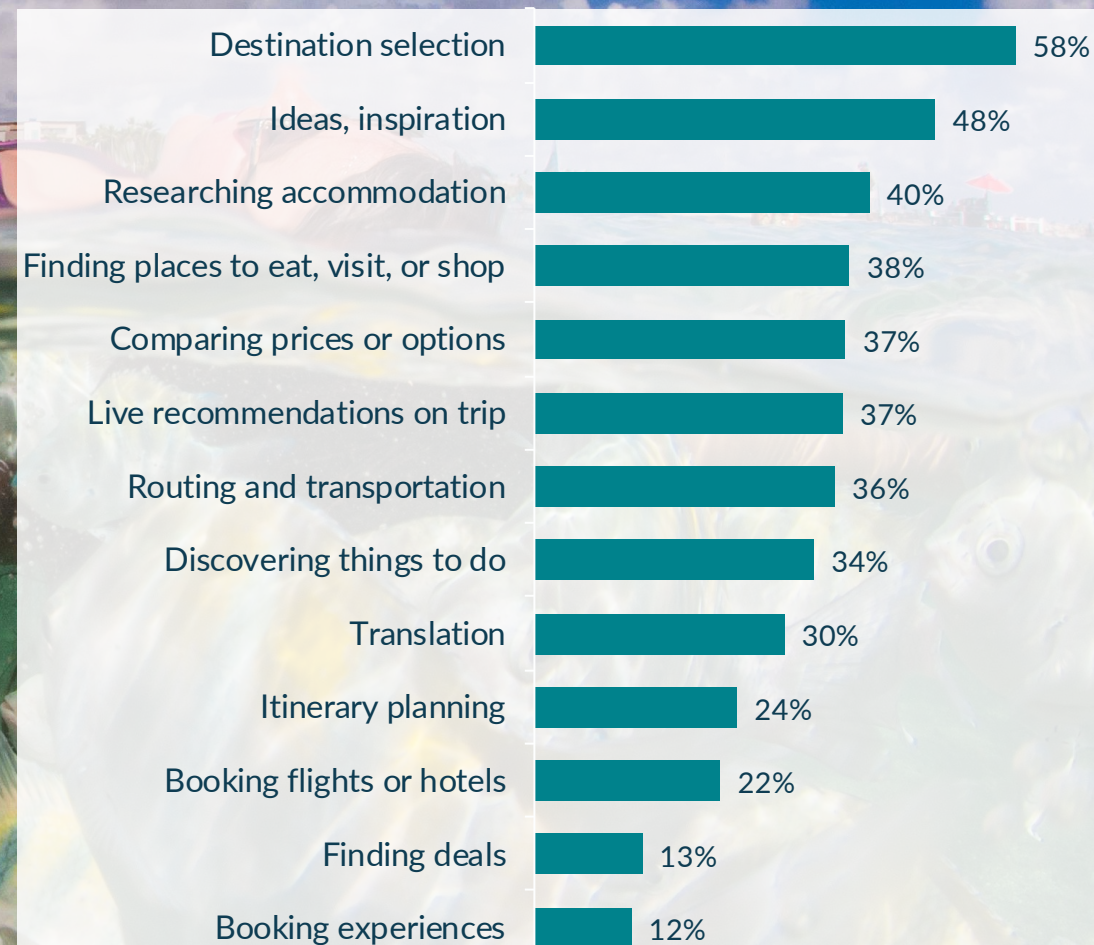
LATAM travelers primarily use AI as a research and discovery tool. The most common uses are destination selection, inspiration and research. AI is also increasingly used during trips for recommendations, navigation and translation.

Despite high adoption, few travelers use AI for booking (and actual booking is largely unavailable directly within most AI tools).

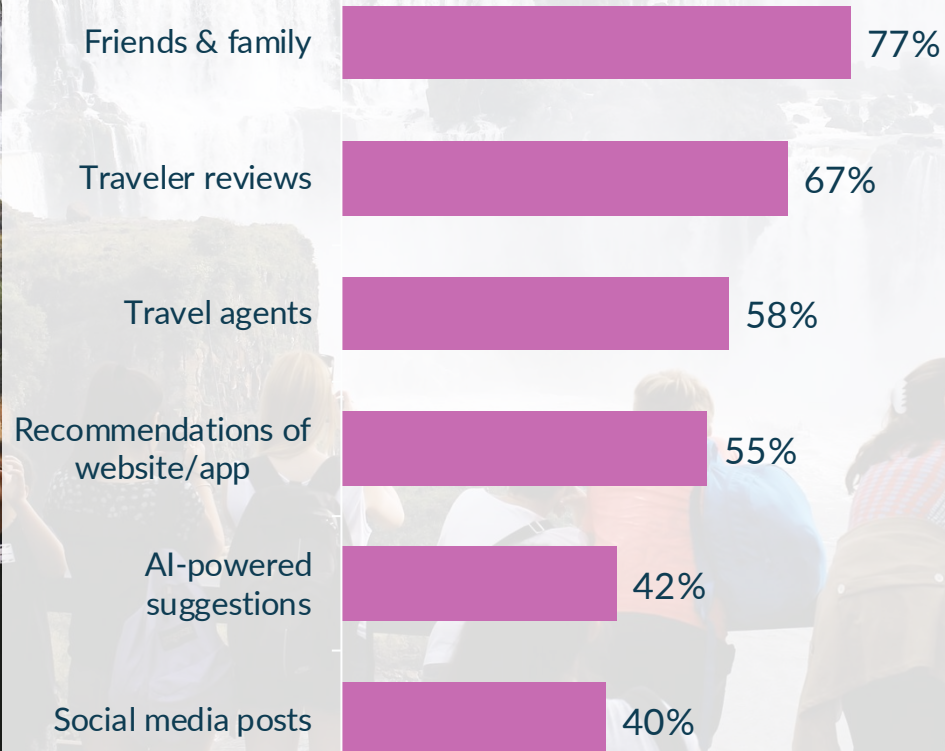
AI is already influencing traveler decisions at the top of the funnel. Travel brands should focus on being discoverable and recommended by AI platforms.

Four out of five travelers who used AI said it was very or extremely helpful, indicating that AI use will not only endure but grow, and cover more of the travel experience.

How Travelers Use AI



Resources Relied on for Experience Recommendations



Trust Beats Tech

When seeking out recommendations for tours, activities and attractions, LATAM travelers place the greatest trust in people-powered sources: friends and family, traveler reviews and travel agents.

AI tools, website recommendations and social media are meaningful discovery inputs, but they remain secondary to human recommendations and social proof.

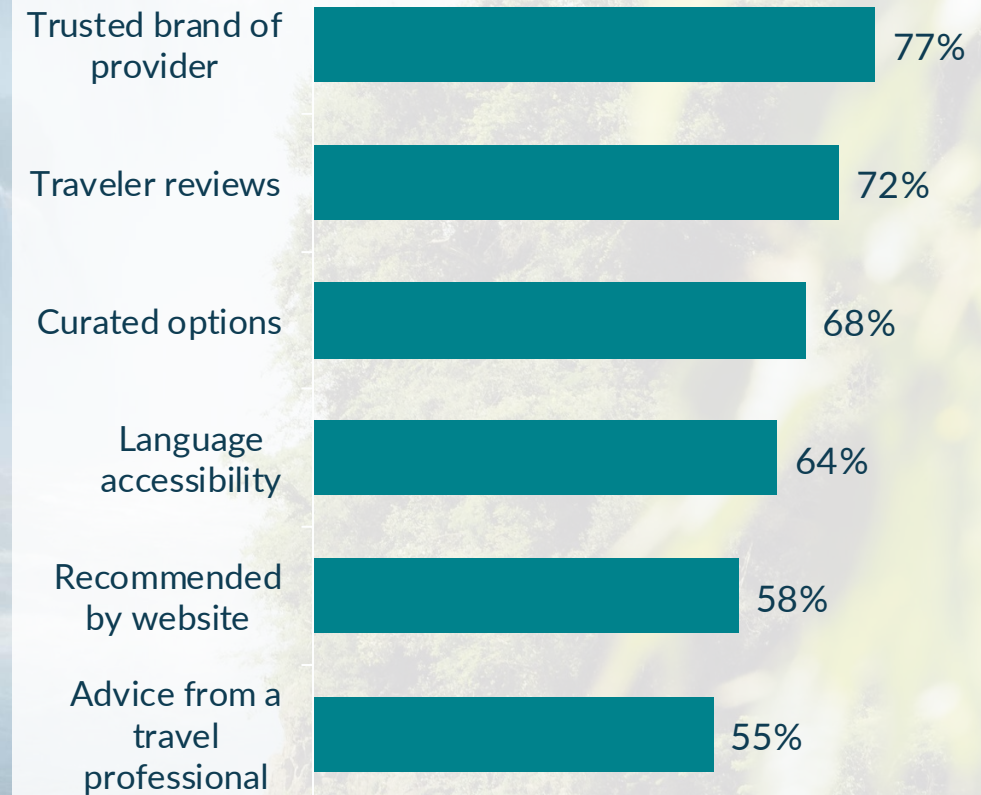
Technology shapes discovery, but trust is still people-powered. The strongest operators and distributors will combine digital reach with visible proof: reviews, reputation, recommendations and trusted local expertise.

Trust Is Still People-Powered

Trust remains the strongest driver of experience selection, led by provider reputation (either the operator or the website), traveler reviews and recommendation options. Website recommendations are less influential.

Digital sources influence discovery, but travelers still validate decisions through trusted human-led sources.

Factors Influencing Experience Choice



The Wrap: Eight Keys to a Successful LATAM Strategy

1. Lead with classic products; differentiate with niche experiences.
2. Localize execution by market.
3. Focus on younger travelers for growth.
4. Design for families and shared experiences.
5. Compete on value — not just price.
6. Be digital-first, but remain multi-channel.
7. Optimize for AI discovery.
8. Earn trust through reviews, reputation and recommendations.



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