



2021 South America Market Report



The cruise industry has proven its resilience throughout its more than 50-year history—as is evident in the industry’s responsible return to operations beginning in July 2020 in Europe. Since then, more than 10 million people have cruised, and intent to cruise is higher than it was prior to the global health crisis.

The combination of robust health and safety protocols implemented by cruise lines, along with the passion of cruise travelers, has created tremendous momentum for a successful restart in about 100 markets worldwide. Importantly, the cruise industry is supporting both an economic and societal recovery as more and more people are able to reconnect with family and friends during a cruise holiday.

With cruise well on its way to full resumption in 2022, our cruise line members are building on an ambitious environmental agenda, which cruise lines initiated well before the global health crisis and continued during the pandemic, for the long-term sustainability of the industry. CLIA cruise line members are committed to sailing toward a better future, and as part of that effort are pursuing the goal of net zero cruising by 2050.

Regional Overview: Caribbean, Central America, South America

Passenger Volume (K)

2019	2020	2021
1,041	479 (-54.0%)	99 (-79.4%)

Average Duration, in Days

2019	2020	2021
7.0	6.8	4.4

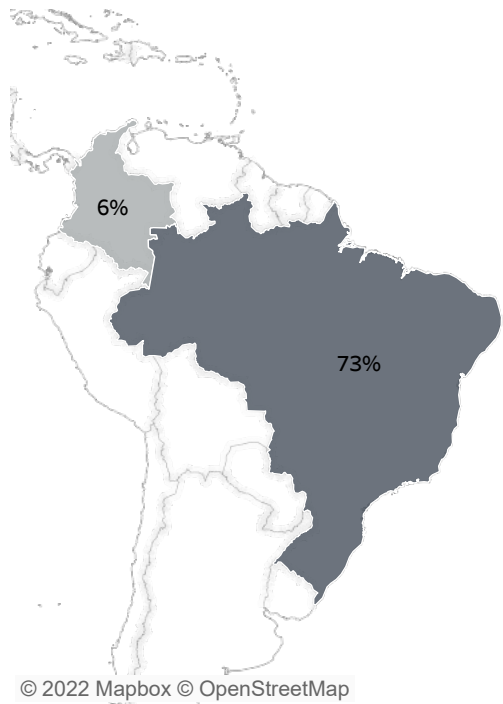
Average Age

2019	2020	2021
43.6	42.2	40.0

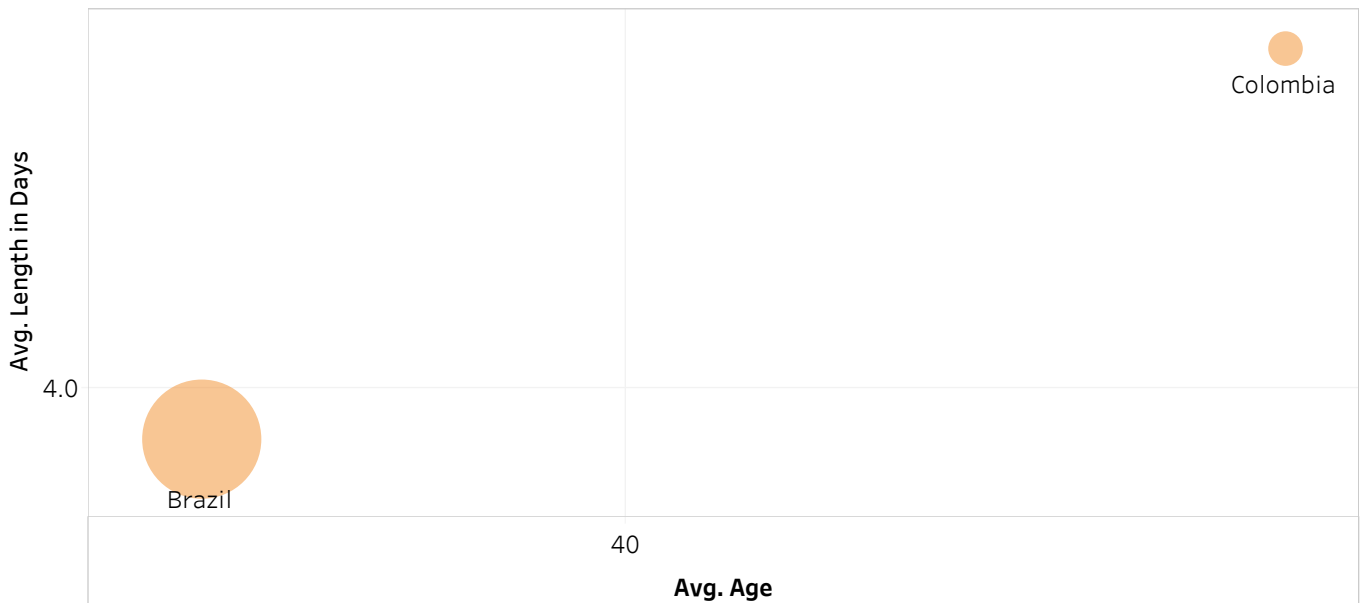
Passenger Volume (K) for Top Countries

	2019	2020	2021
Brazil	567	331 (-41.7%)	72 (-78.3%)
Argentina	151	76 (-49.8%)	(-100.0%)
Colombia	96	17 (-82.1%)	6 (-65.1%)
Chile	45	12 (-72.6%)	(-100.0%)
Panama	21	8 (-63.7%)	(-100.0%)
Peru	19	5 (-75.5%)	(-100.0%)
Uruguay	19	11 (-44.6%)	(-100.0%)
Ecuador	18	(-100.0%)	
Costa Rica	16	5 (-68.5%)	(-100.0%)
Bahamas	11	(-100.0%)	
Dominican Republic	9	(-100.0%)	
Trinidad & Tobago	8	(-100.0%)	
Guatemala	8	(-100.0%)	
Bolivia	7	(-100.0%)	
Barbados	7	(-100.0%)	
Venezuela	6	(-100.0%)	
Virgin Islands (US)	5	(-100.0%)	

Share of Source Passengers, 2021 Geographic Projection



Average Age and Cruise Length for Top Source Markets, 2021

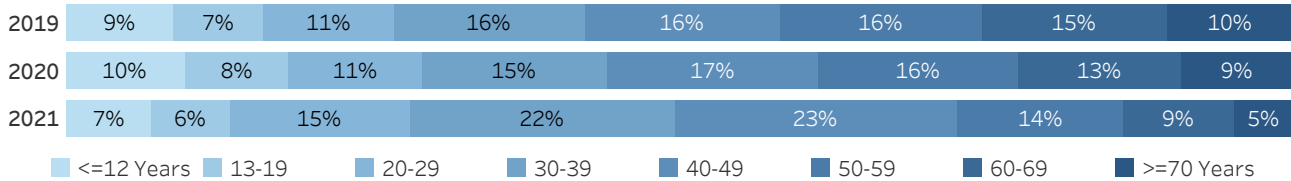


Regional Overview: Caribbean, Central America, South America (Continued)

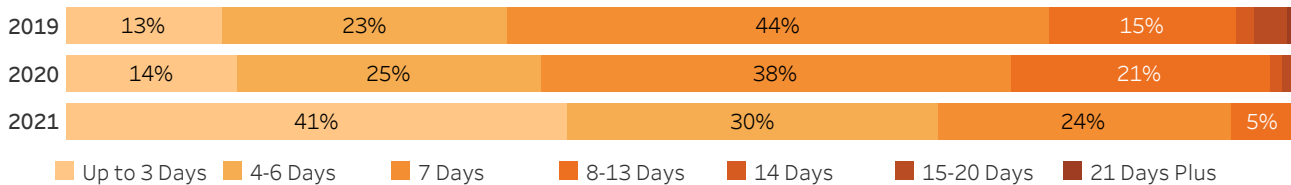
Average Age and Cruise Length by Destination / Trade Route, 2021



Average Passenger Age Groups

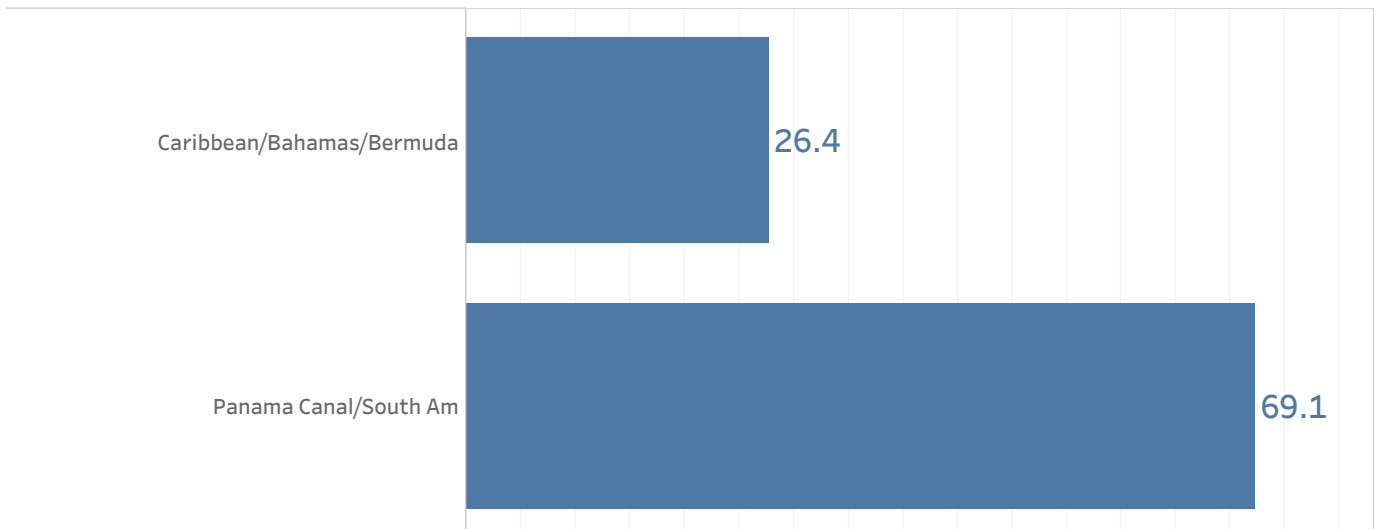


Average Cruise Duration



Volume of Passengers (in K) to Destinations, 2021

At least 4K Passengers per Destination

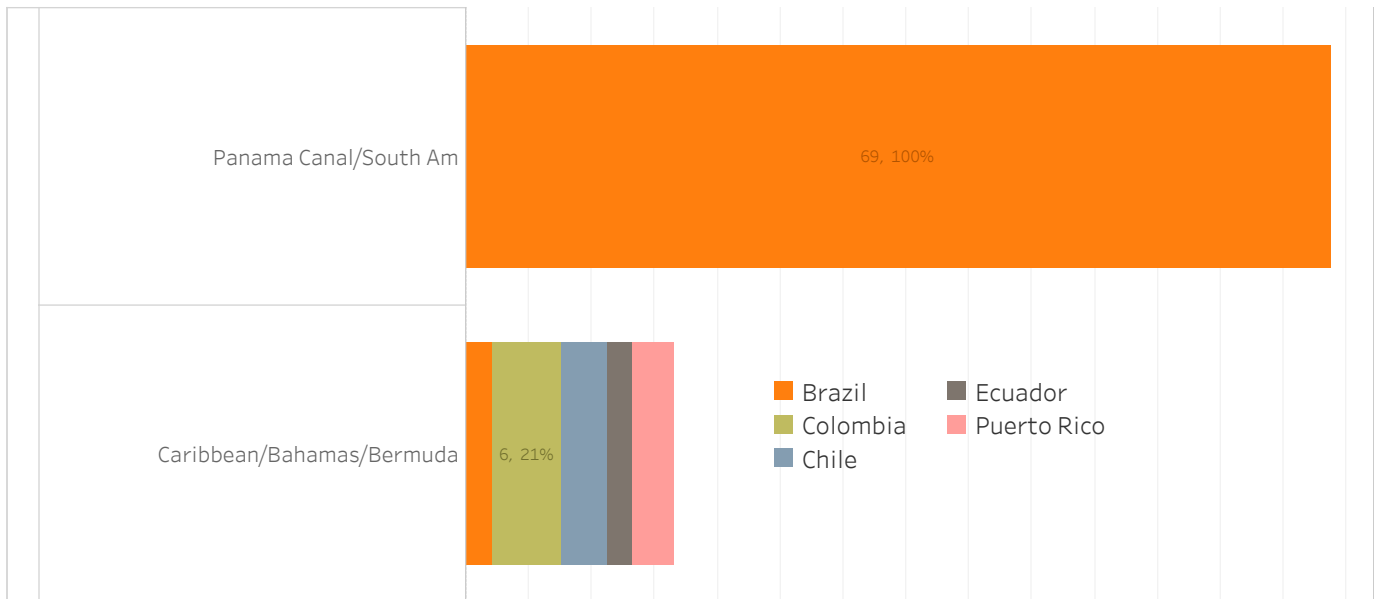


Regional Overview: Caribbean, Central America, South America (Continued)

Passenger Volume by Trade (K)

	2019	2020	2021
Panama Canal/South Am	455	345 (-24% ▼)	69 (-80% ▼)
Caribbean/Bahamas/Bermuda	398	110 (-72% ▼)	26 (-76% ▼)
Mediterranean	93	6 (-94% ▼)	(-100% ▼)
Transatlantic & World Cruise	34	5 (-84% ▼)	(-100% ▼)
Northern Europe	11	(-100% ▼)	
Africa/Middle East	10	6 (-45% ▼)	(-100% ▼)
Baltics	8	(-100% ▼)	
Alaska	7	(-100% ▼)	
Asia & China	6	(-100% ▼)	

Passenger Volume (K) by Trade & Top Source Countries in 2021



Passenger Volume (K) by Quarter & Top Source Countries



GLOSSARY

This report is based on 2021 calendar year passenger statistics provided by the ocean-going cruise line members of the Cruise Lines International Association (CLIA), who represent nearly 90% of global cruise industry capacity, plus additional data collected by IRN and CHART Management Consultants from non-CLIA cruise lines. The research is based on a methodology that is used in similar studies around the world. This consistent approach facilitates comparisons with other major cruise markets. Data points below 2,000 passengers (for source markets) and 4,000 (for destinations) are not displayed.

All analyses and information exclude one-night cruises, consistent with past CLIA Asia source market reports. Destinations and trade routes are determined by the area where the ship is predominantly sailing, with the exception of the following:

- “Mainland China, Hong Kong, and Taiwan” represents sailings that embark from these markets and sail within Asia.
- “Rest of Asia” excludes sailings that embark from Mainland China, Hong Kong, and Taiwan.
- References to “Other” in the destinations/trade routes consist of transatlantic, world cruise, Africa/Middle East, Panama Canal/South America, Canada/New England, exploration, no trade route identified, and others.



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