



CLIA
2024
SOUTH
AMERICA
MARKET
REPORT



Regional Overview: South America

Passenger Volume (K)

2019	2022	2023	2024
935	426 (-54.4%)	997 (133.8%)	1,075 (7.8%)

Average Duration, in Days

2019	2022	2023	2024
6.9	6.0	6.7	6.8

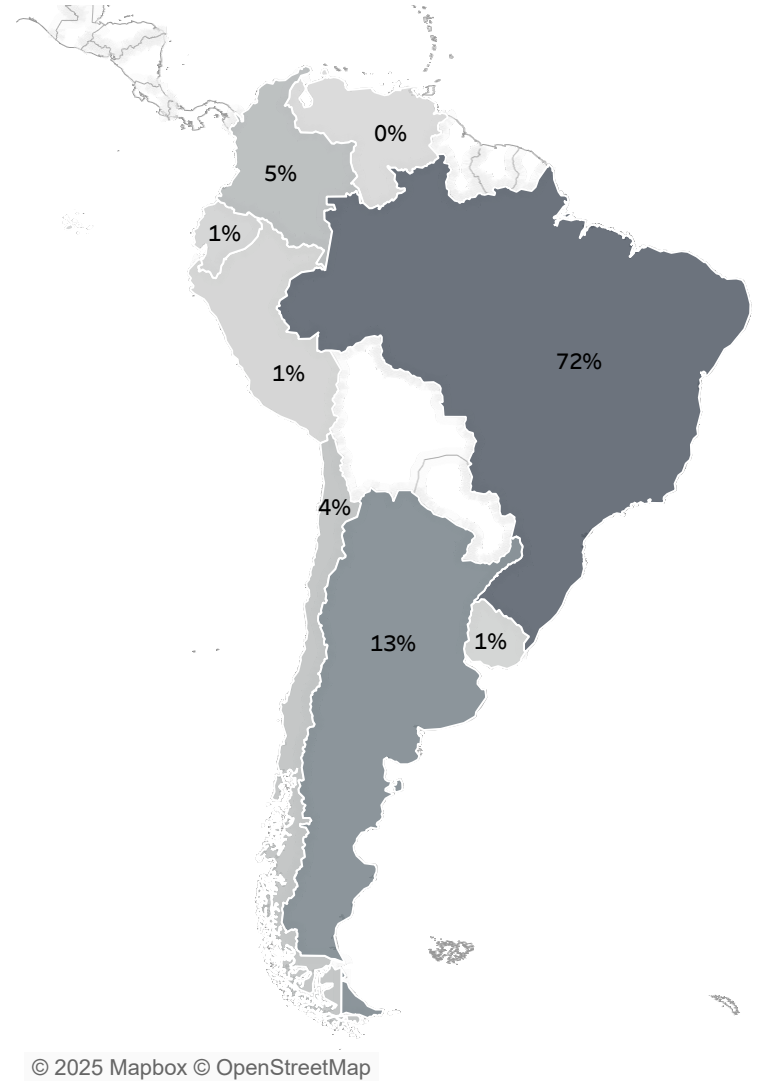
Average Age

2019	2022	2023	2024
43.9	45.1	45.4	45.8

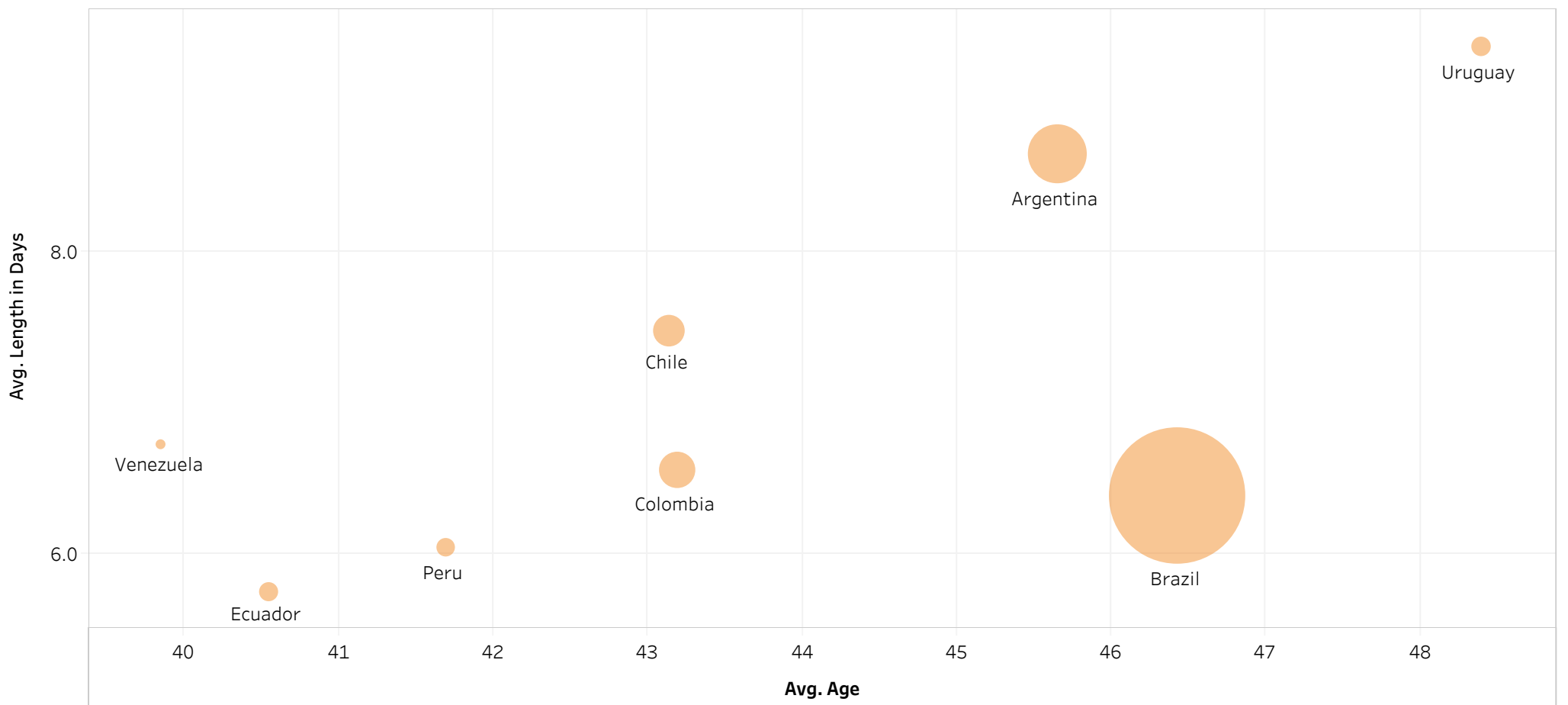
Passenger Volume (K) for Top Countries

	2019	2022	2023	2024
Brazil	567	284 (-50.0%)	740 (160.9%)	776 (4.8%)
Argentina	151	41 (-72.6%)	130 (213.7%)	145 (11.6%)
Colombia	96	33 (-66.1%)	32 (-1.8%)	55 (71.7%)
Chile	45	31 (-31.8%)	41 (33.9%)	42 (1.0%)
Peru	19	12 (-39.1%)	13 (9.6%)	14 (10.1%)
Uruguay	19	7 (-63.1%)	16 (122.4%)	16 (1.3%)
Ecuador	18	10 (-43.7%)	13 (28.5%)	15 (15.6%)
Bolivia	7	(-100.0%)	5	(-100.0%)
Venezuela	6	(-100.0%)		4

Share of Source Passengers, 2024 Geographic Projection

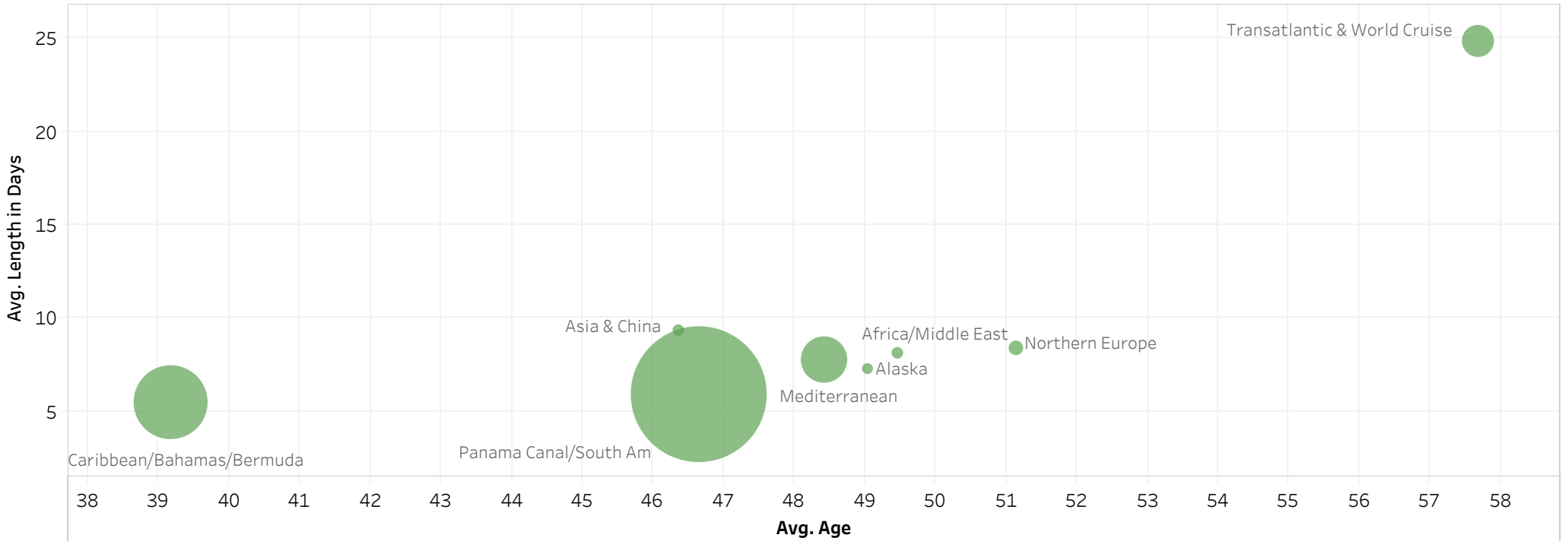


Average Age and Cruise Length for Top Source Markets, 2024

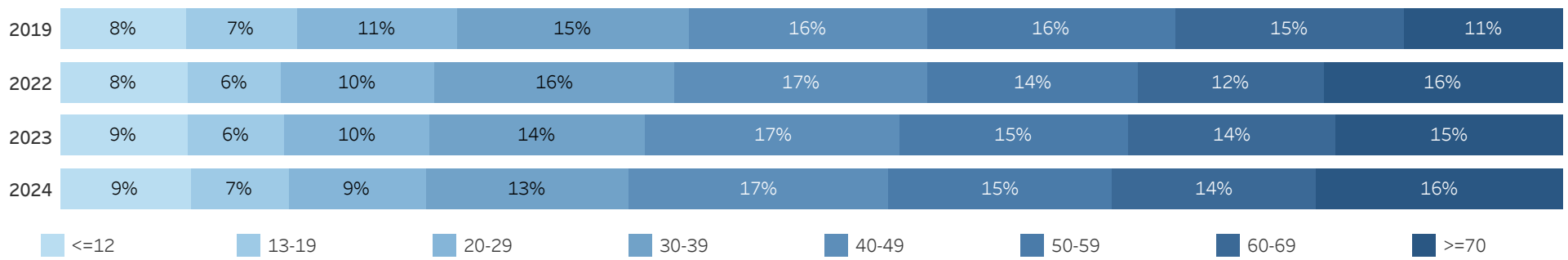


Regional Overview: South America (Continued)

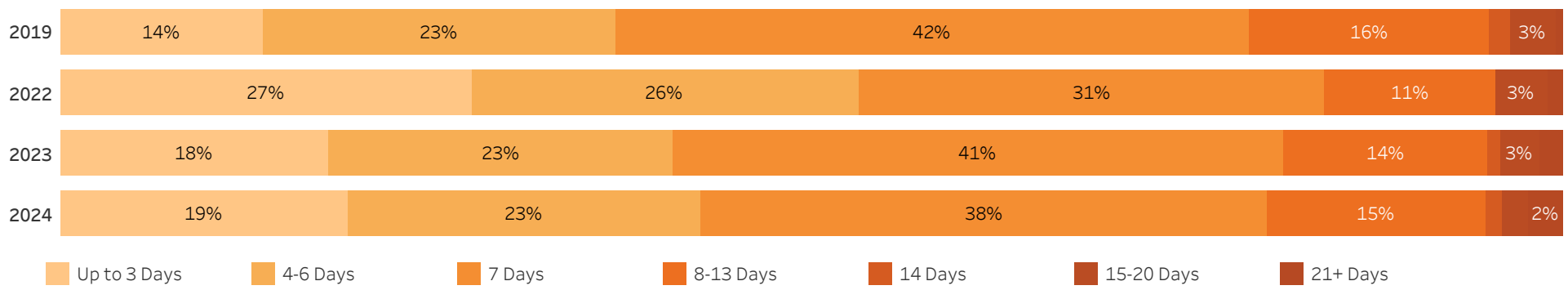
Average Age and Cruise Length by Destination / Trade Route, 2024



Average Passenger Age Groups

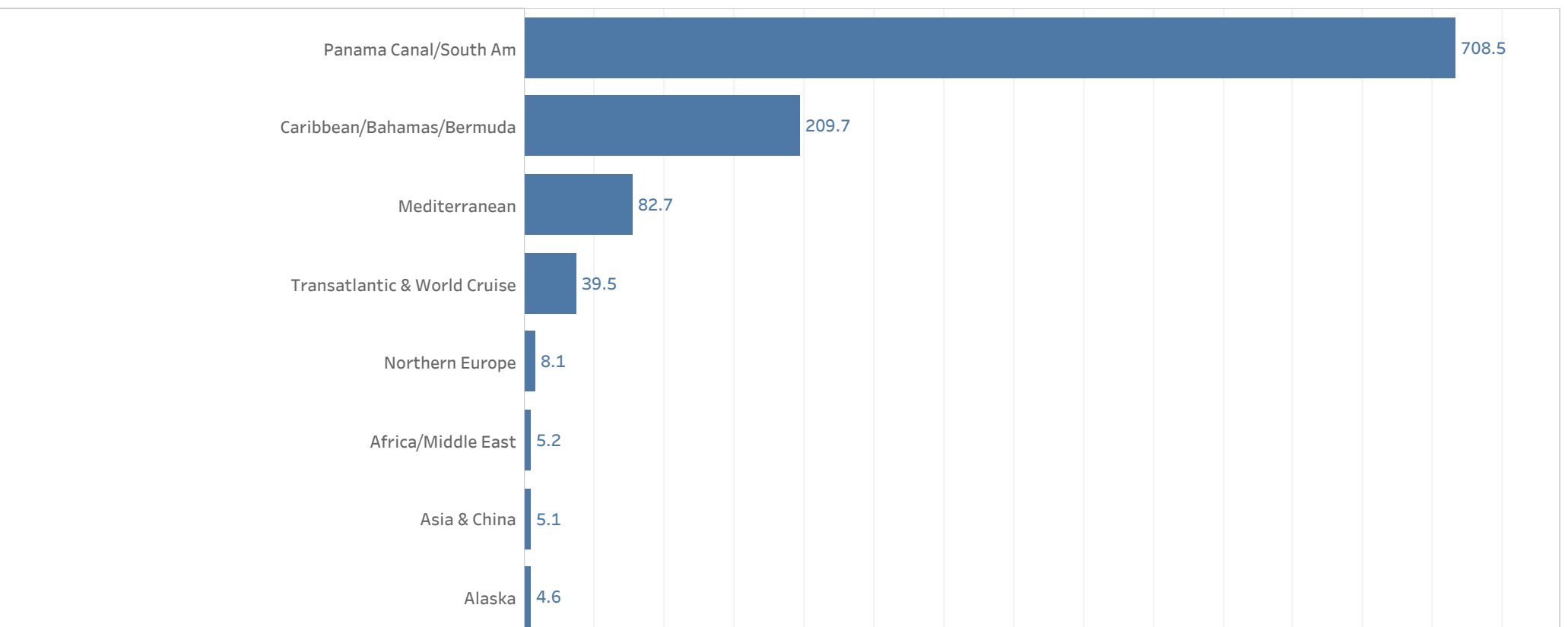


Average Cruise Duration



Volume of Passengers (in K) to Destinations, 2024

At least 4K Passengers per Destination

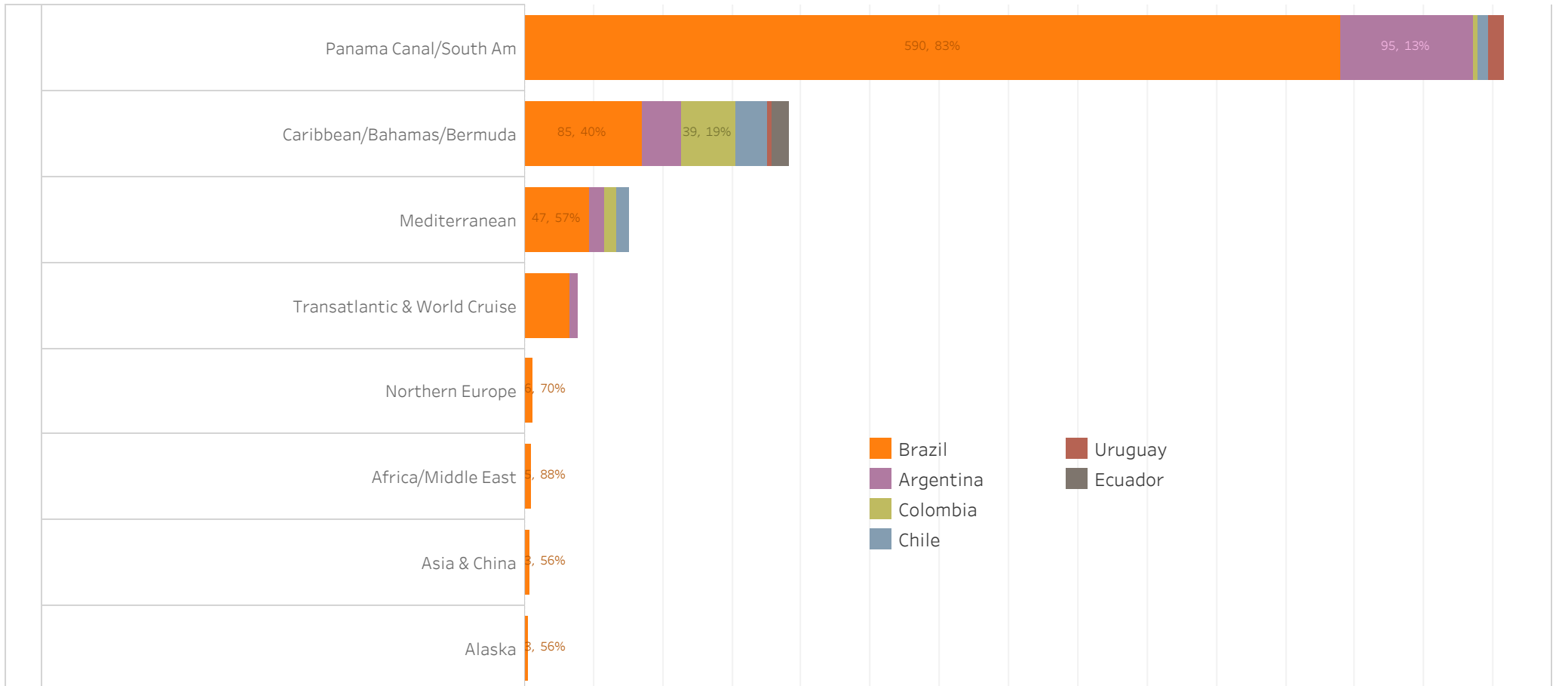


Regional Overview: South America (Continued)

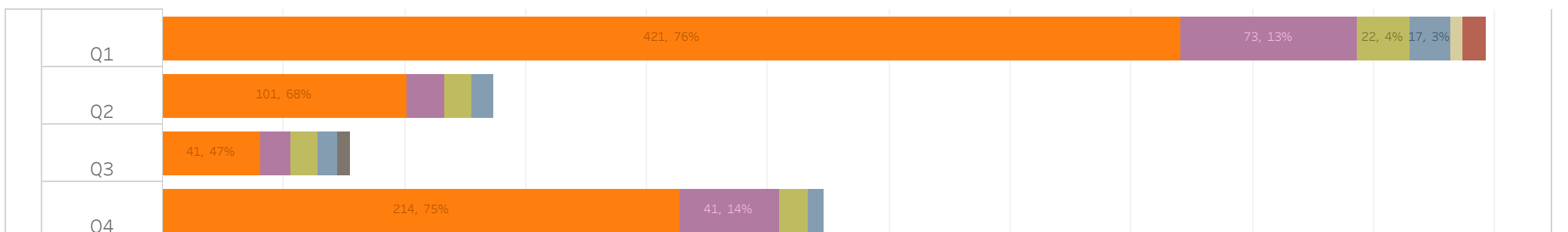
Passenger Volume by Trade (K)

	2019	2022	2023	2024
Panama Canal/South Am	454	216 (-52% ▼)	680 (215% ▲)	709 (4% ▲)
Caribbean/Bahamas/Bermuda	310	121 (-61% ▼)	160 (32% ▲)	210 (31% ▲)
Mediterranean	85	53 (-38% ▼)	83 (57% ▲)	83 (0% ▲)
Transatlantic & World Cruise	33	19 (-44% ▼)	41 (121% ▲)	39 (-4% ▼)
Northern Europe	10	4 (-57% ▼)	9 (123% ▲)	8 (-14% ▼)
Africa/Middle East	10	4 (-59% ▼)	6 (38% ▲)	5 (-7% ▼)
Asia & China	5	(-100% ▼)	5	5 (2% ▲)
Alaska	5	(-100% ▼)		5
Baltics	7	(-100% ▼)		

Passenger Volume (K) by Trade & Top Source Countries in 2024



Passenger Volume (K) by Quarter & Top Source Countries



Source Market: Brazil

Passenger Volume (K)

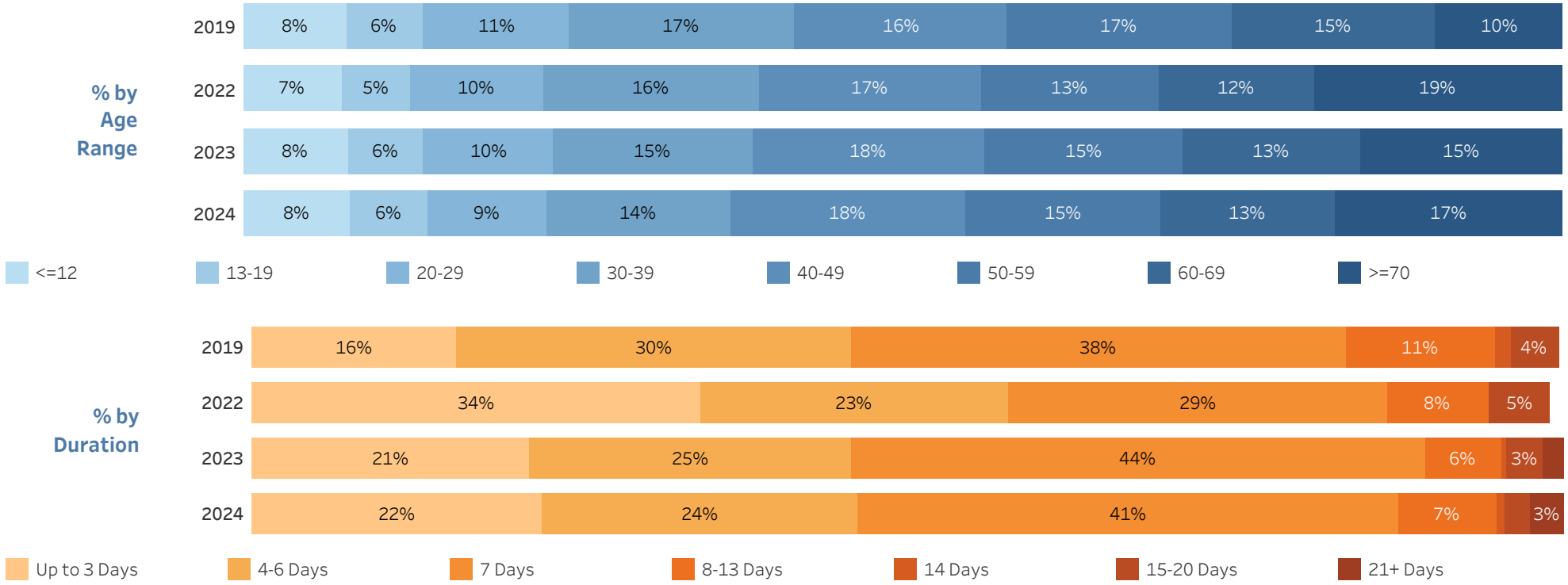
2019	2022	2023	2024
567.5	283.8 (-50% ▼)	740.5 (161% ▲)	775.7 (5% ▲)

Average Duration, in Days

2019	2022	2023	2024
6.5	5.6	6.2	6.4

Average Age

2019	2022	2023	2024
44.6	43.6	44.7	44.9



Passenger Percentages by Trade Route / Destination

	2019	2022	2023	2024
South America	65.1%	69.6%	78.0%	76.1%
Caribbean	18.2%	11.9%	8.6%	10.9%
Transatlantic/World Cruise	4.6%	5.4%	4.5%	4.2%
Eastern Med	3.4%	3.8%	2.5%	2.7%
Western Med	3.4%	4.3%	2.7%	2.5%
Central Med	0.7%	1.2%	0.9%	0.9%
Northern Europe	1.0%	1.1%	1.0%	0.7%
Africa/Middle East/Other	1.5%	1.3%	0.7%	0.7%
Asia	0.5%		0.4%	0.4%
Alaska	0.5%			0.3%
Baltics	0.6%			



Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2019	2022	2023	2024	2019	2022	2023	2024
<=12	42	21	58	62	-50%	177%	7%	
13-19	31	15	42	46	-53%	184%	9%	
20-29	60	29	74	70	-53%	158%	-5%	
30-39	92	46	112	108	-50%	142%	-4%	
40-49	88	48	130	138	-46%	172%	6%	
50-59	92	38	111	115	-59%	192%	3%	
60-69	84	33	99	103	-60%	198%	3%	
>=70	53	53	114	133	1%	114%	17%	

Passenger Volume & YOY Change by Duration

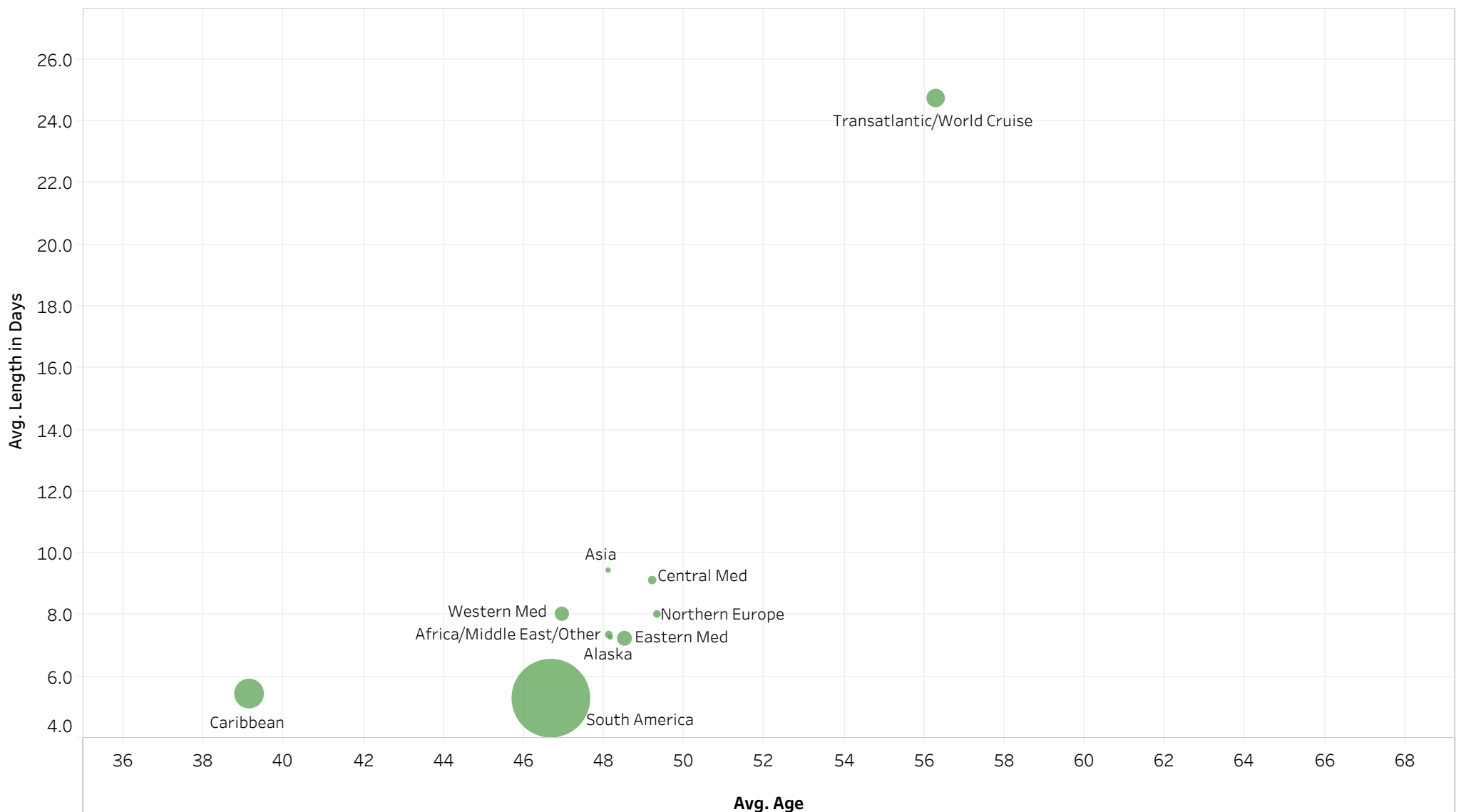
	Passenger in K				Variance			
	2019	2022	2023	2024	2019	2022	2023	2024
Up to 3 Days	89	97	157	171	9%	62%	9%	
4-6 Days	171	67	182	187	-61%	173%	3%	
7 Days	214	82	324	320	-62%	294%	-1%	
8-13 Days	64	22	43	58	-66%	97%	35%	
14 Days	7		3	5	-100%		79%	
15-20 Days	21	13	21	14	-35%	54%	-30%	
21+ Days			12	20				69%

Source Market: **Brazil** (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger in K				Variance			
	2019	2022	2023	2024	2019	2022	2023	2024
South America	368	198	577	590	-46%	192%		2%
Caribbean	103	34	64	85	-67%	89%		32%
Transatlantic/World Cruise	26	15	33	33	-42%	119%		-2%
Eastern Med	19	11	19	21	-44%	74%		13%
Western Med	19	12	20	19	-38%	64%		-2%
Central Med	4	3	7	7	-10%	90%		5%
Northern Europe	6	3	7	6	-41%	123%		-21%
Africa/Middle East/Other	10	4	6	6	-63%	46%		2%
Asia	3		3	3			193%	5%
Alaska	3			3				55%
Baltics	4							

Brazil, Average Age and Cruise Length by Trade Route, 2024



Data Points with Values Below 2,000 Passengers are not Displayed in the above Visuals and Tables.

Some Data Points in the following dimensions were not captured, and were ignored from the corresponding tables and visuals: Age Group, Duration Group, and Trade Name; these exclusions account for, on average, 1% of each display.

Source Market: Argentina

Passenger Volume (K)

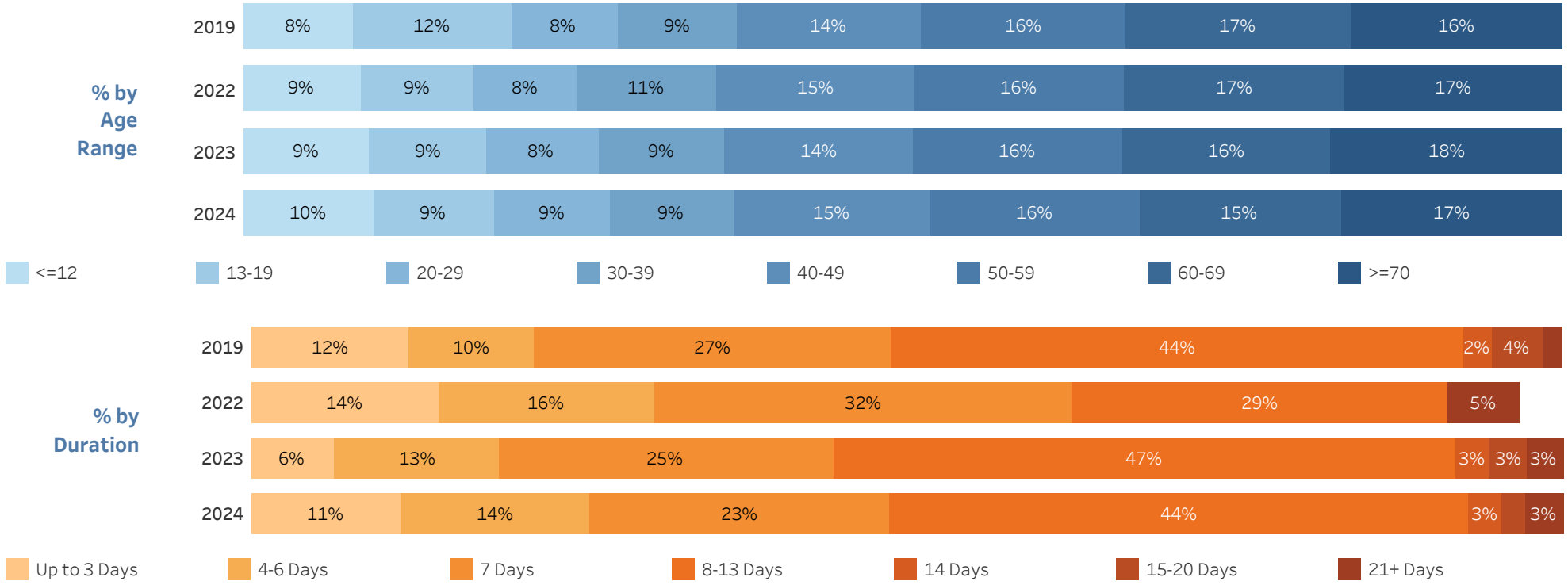
2019	2022	2023	2024
150.9	41.4 (-73% ▼)	129.8 (214% ▲)	144.8 (12% ▲)

Average Duration, in Days

2019	2022	2023	2024
8.6	8.5	9.2	8.7

Average Age

2019	2022	2023	2024
46.5	47.3	46.7	46.3



Passenger Percentages by Trade Route / Destination

	2019	2022	2023	2024
South America	50.3%	34.8%	64.0%	65.9%
Caribbean	29.8%	36.6%	18.9%	20.3%
Transatlantic/World Cruise	4.5%	7.1%	5.0%	4.0%
Eastern Med	5.3%	7.5%	4.5%	3.6%
Western Med	4.8%	7.6%	3.5%	3.1%
Central Med			1.6%	



Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2019	2022	2023	2024	2019	2022	2023	2024
<=12	12	4	12	14	-71%	241%	13%	
13-19	18	3	12	13	-81%	236%	11%	
20-29	12	3	11	12	-73%	241%	13%	
30-39	13	4	12	13	-68%	188%	9%	
40-49	21	6	19	21	-70%	203%	14%	
50-59	23	6	21	22	-72%	221%	9%	
60-69	25	7	20	22	-73%	200%	6%	
>=70	24	7	23	24	-72%	241%	4%	

Passenger Volume & YOY Change by Duration

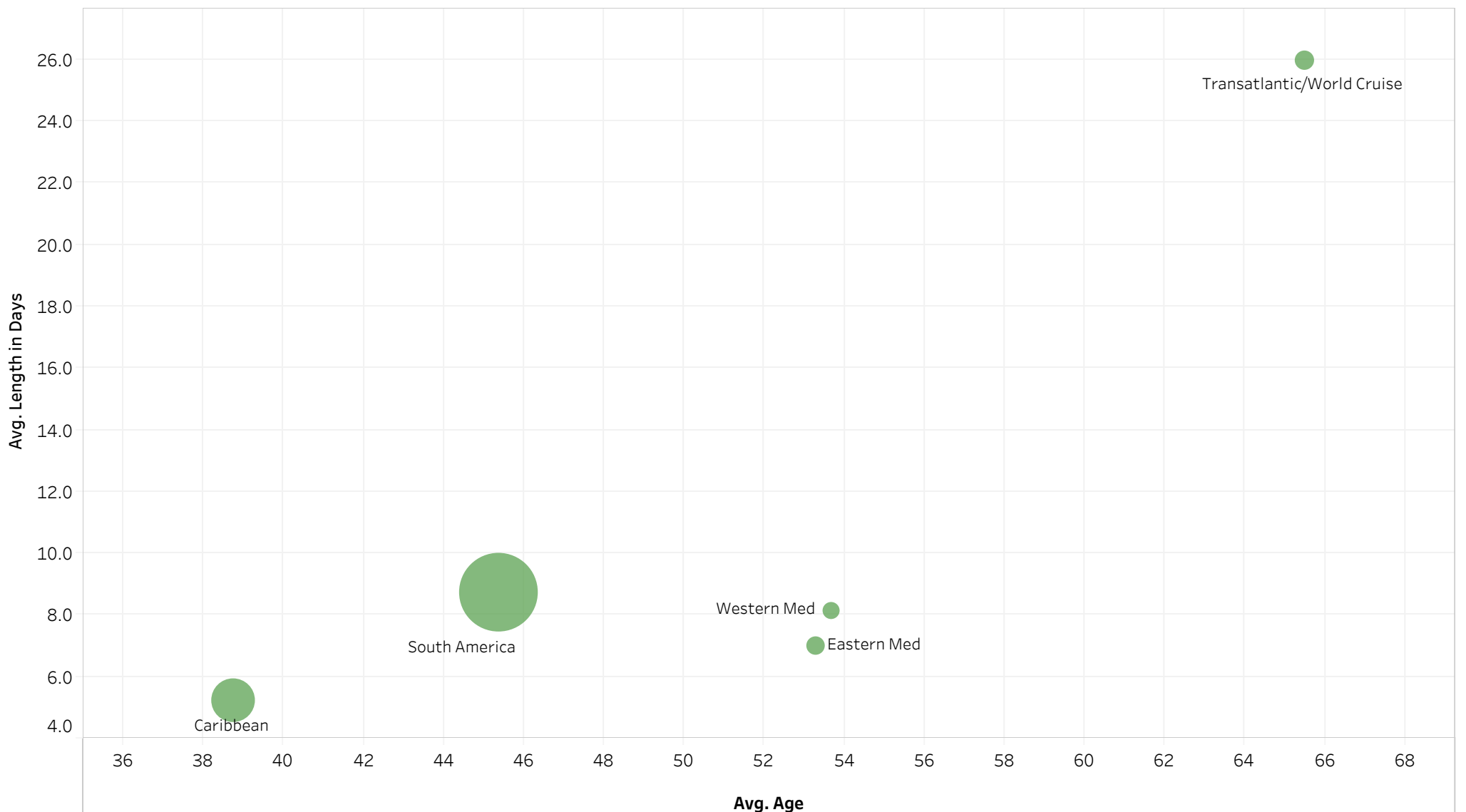
	Passenger in K				Variance			
	2019	2022	2023	2024	2019	2022	2023	2024
Up to 3 Days	18	6	8	16	-67%	37%	103%	
4-6 Days	15	7	16	21	-53%	142%	27%	
7 Days	41	13	33	33	-68%	151%	0%	
8-13 Days	66	12	61	64	-82%	419%	4%	
14 Days	3		3	4	-100%		12%	
15-20 Days	6		4	3	-100%		-30%	
21+ Days	2	2	3	4	-1%	54%	17%	

Source Market: **Argentina** (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger in K				YOY Change			Variance
	2019	2022	2023	2024	2019	2022	2023	2024
South America	75	14	83	95	-81%	-81%	477%	15%
Caribbean	45	15	24	29	-66%	-66%	62%	20%
Transatlantic/World Cruise	7	3	6	6	-56%	-56%	121%	-11%
Eastern Med	8	3	6	5	-61%	-61%	89%	-10%
Western Med	7	3	5	4	-57%	-57%	45%	-2%
Central Med			2				92%	
Africa/Middle East/Other	3							

Argentina, Average Age and Cruise Length by Trade Route, 2024



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Source Market: Colombia

Passenger Volume (K)

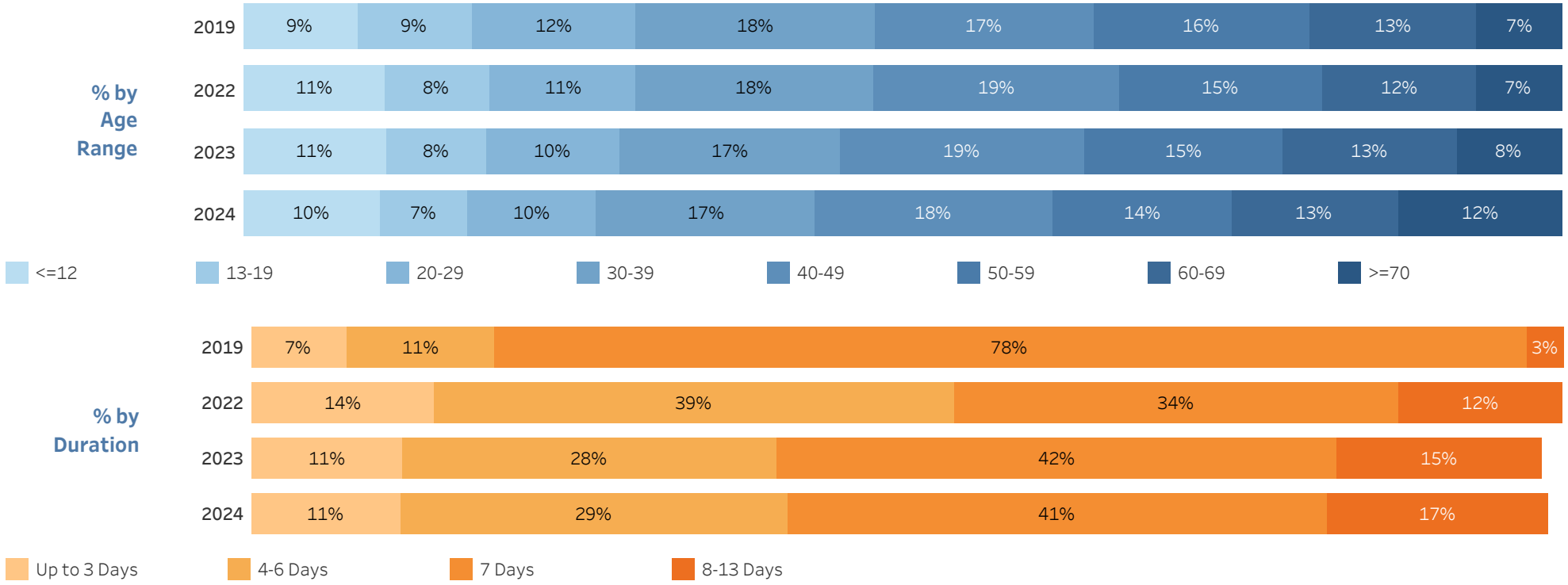
2019	2022	2023	2024
96.4	32.6 (-66% ▼)	32.1 (-2% ▼)	55.1 (72% ▲)

Average Duration, in Days

2019	2022	2023	2024
6.6	6.0	6.6	6.6

Average Age

2019	2022	2023	2024
41.2	40.5	41.8	43.6



Passenger Percentages by Trade Route / Destination

	2019	2022	2023	2024
Caribbean	85.6%	69.6%	64.1%	71.5%
Eastern Med	3.4%	10.0%	10.9%	8.3%
South America				6.4%
Western Med	6.4%	7.6%	8.4%	5.1%



Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2019	2022	2023	2024	2019	2022	2023	2024
<=12	8	4	3	6	-58%	-1%	63%	
13-19	8	3	2	4	-69%	-5%	50%	
20-29	12	4	3	5	-69%	-11%	66%	
30-39	17	6	5	9	-66%	-9%	71%	
40-49	16	6	6	10	-62%	-2%	66%	
50-59	16	5	5	8	-68%	-4%	55%	
60-69	12	4	4	7	-68%	12%	62%	
>=70	6	2	3	7	-66%	19%	170%	

Passenger Volume & YOY Change by Duration

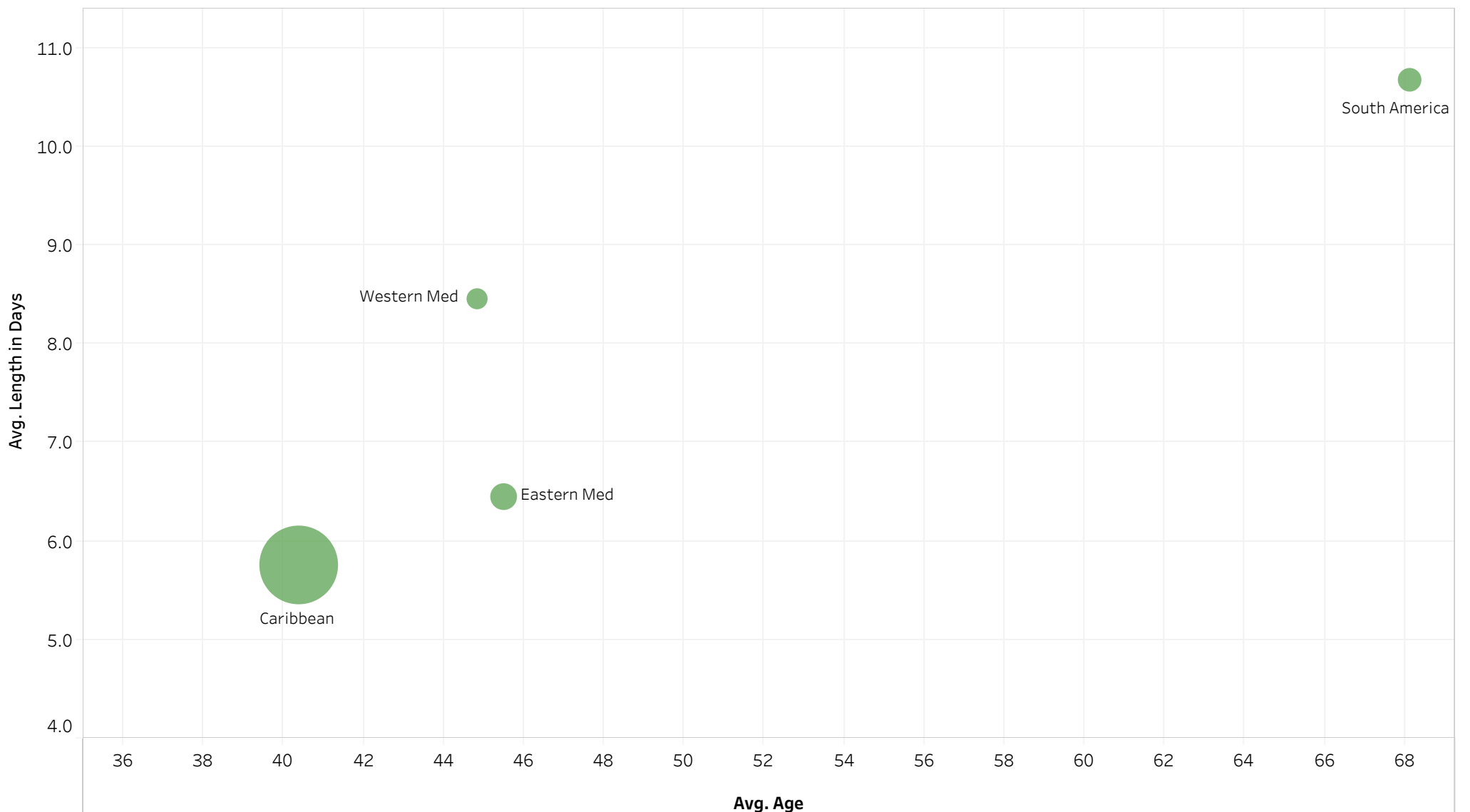
	Passenger in K				Variance			
	2019	2022	2023	2024	2019	2022	2023	2024
Up to 3 Days	7	5	4	6	-35%	-19%	70%	
4-6 Days	11	13	9	16	19%	-29%	78%	
7 Days	75	11	14	22	-85%	24%	65%	
8-13 Days	3	4	5	9	51%	23%	85%	

Source Market: **Colombia** (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger in K				Variance			
	2019	2022	2023	2024	2019	2022	2023	2024
Caribbean	82	23	21	39	-72%	-10%		91%
Eastern Med	3	3	3	5	1%	7%		30%
South America				4				157%
Western Med	6	2	3	3	-59%	9%		4%

Colombia, Average Age and Cruise Length by Trade Route, 2024



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