



CLIA

2025

SOUTH AMERICA MARKET REPORT



South America 2025

1.12 million South Americans sailed on an ocean-going cruise in 2025, a 4.2% increase from the 1.075 million in 2024. This represented more moderate growth than the prior year's 7.8% increase from 997,000 in 2023. Both average ages and average durations declined year over year, from 45.8 to 45.2 years of age and from 6.8 days to 6.3 days, respectively. Overall, guests were slightly younger and took slightly shorter cruises than in the prior year.

The largest source market, by a wide margin, was Brazil, accounting for 783.8 thousand of the 1.12 million total from South America in 2025, about a 70% share, up approximately 1% from 775.7 thousand in 2024. Argentina, in second place, recorded 173,000 guests sailing in 2025, a 19.5% increase from the 144.8 thousand that sailed in 2024. Colombia cemented its place as the third-largest market with 61.5 thousand, an almost 12% increase from 55.1 thousand in 2024, but still 56% below its peak of 96.4 thousand in 2019.

Most guests from South American markets sailed from South America on their cruise: 722,000 of the 1.12 million, representing a 64% share. Those sailing within the continent recorded average durations of 5.6 days and an average age of 46 years. The second most popular destination for South American guests was the Caribbean, with 239.4 thousand sailing there, an average duration of 5.4 days, and an average age of 39.2 years.

Guests from Ecuador, 16.9 thousand in 2025, up 11% from 2024, ranked number five in South America in 2025 and had the youngest average age among South American markets at 40.5 years old. Guests from Uruguay, ranked number seven from South America in 2025, totaled 13.4 thousand, down 15% from 15.8 thousand in 2024, and sailed on the longest average durations at 9.0 days.

Regional Overview: South America 2022-2025

Passenger Volume (K)

2022	2023	2024	2025
426.4	996.9 (133.8%)	1,074.7 (7.8%)	1,119.6 (4.2%)

Average Duration, in Days

2022	2023	2024	2025
6.0	6.7	6.8	6.3

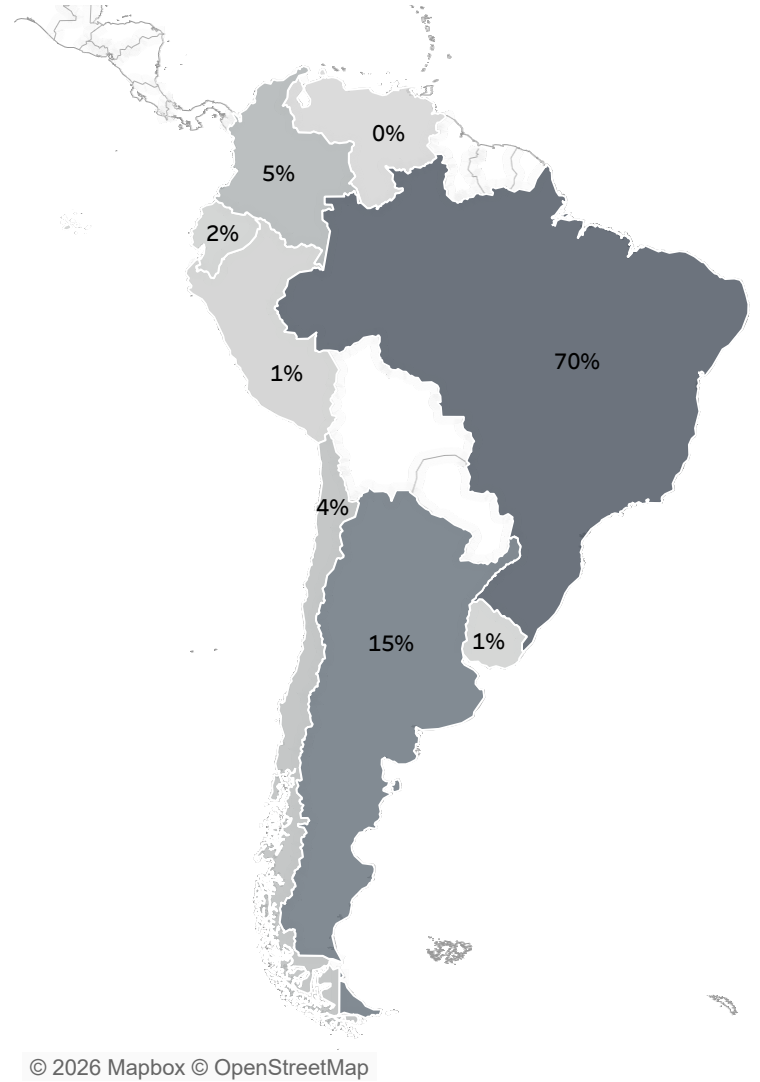
Average Age

2022	2023	2024	2025
45.1	45.4	45.8	45.2

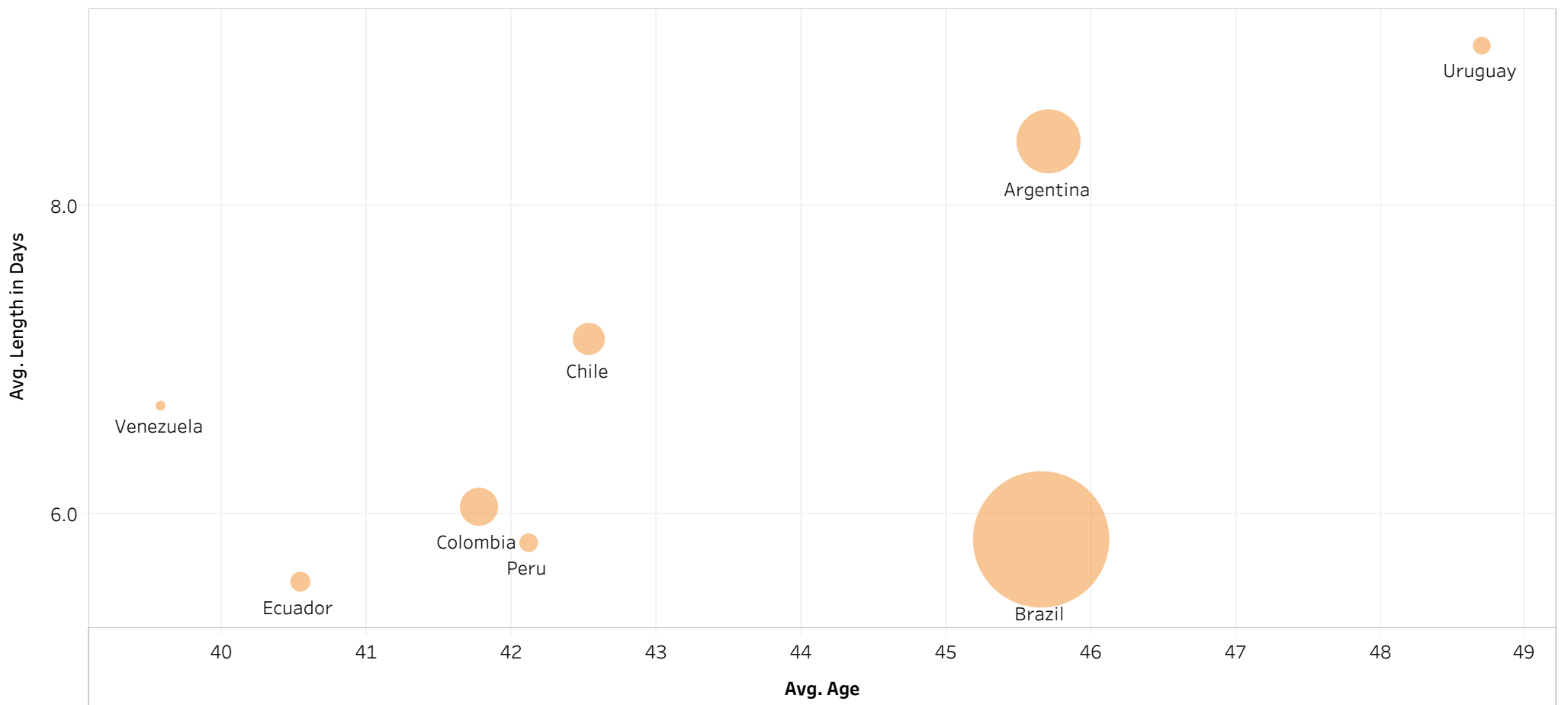
Passenger Volume (K) for Top Countries

	2022	2023	2024	2025
Brazil	283.8	740.5 (160.9%)	775.7 (4.8%)	783.8 (1.0%)
Argentina	41.4	129.8 (213.7%)	144.8 (11.6%)	173.0 (19.5%)
Colombia	32.6	32.1 (-1.8%)	55.1 (71.7%)	61.5 (11.8%)
Chile	30.9	41.3 (33.9%)	41.7 (1.0%)	43.8 (4.8%)
Ecuador	10.2	13.1 (28.5%)	15.2 (15.6%)	16.9 (11.1%)
Peru	11.8	13.0 (9.6%)	14.3 (10.1%)	14.7 (2.9%)
Uruguay	7.0	15.6 (122.4%)	15.8 (1.3%)	13.4 (-15.0%)
Venezuela			4.1	4.0 (-0.7%)
Bolivia		4.7	(-100.0%)	

Share of Source Passengers, 2025 Geographic Projection

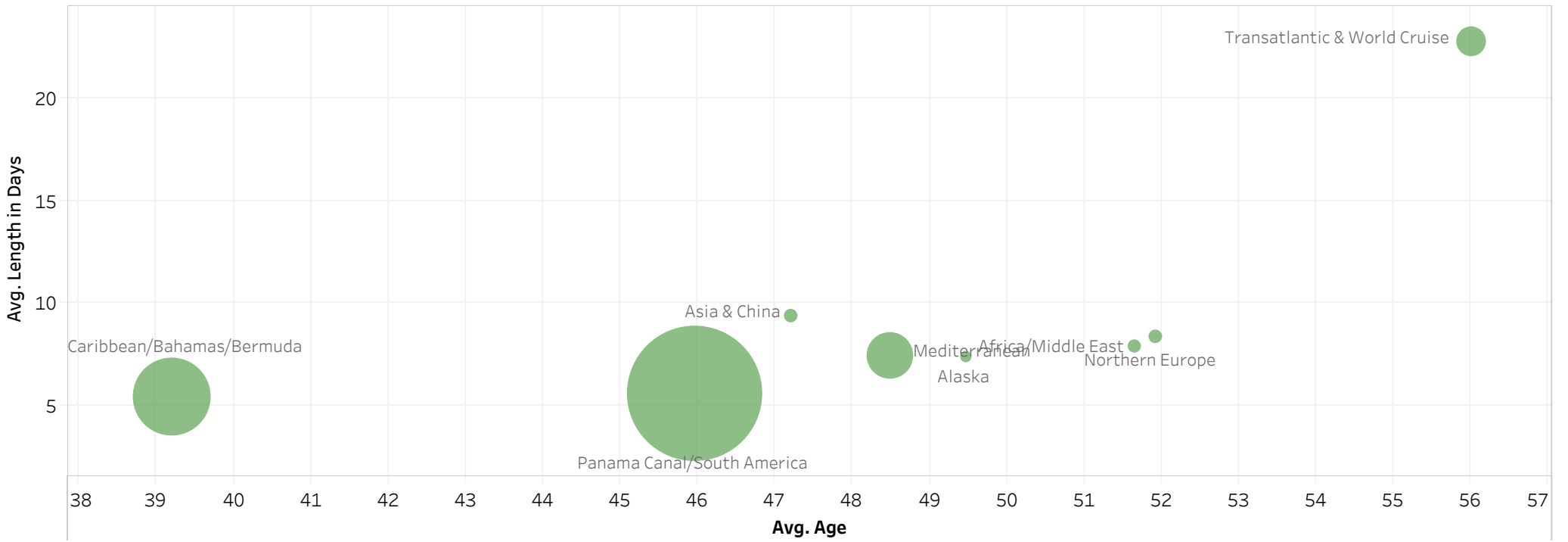


Average Age and Cruise Length for Top Source Markets, 2025

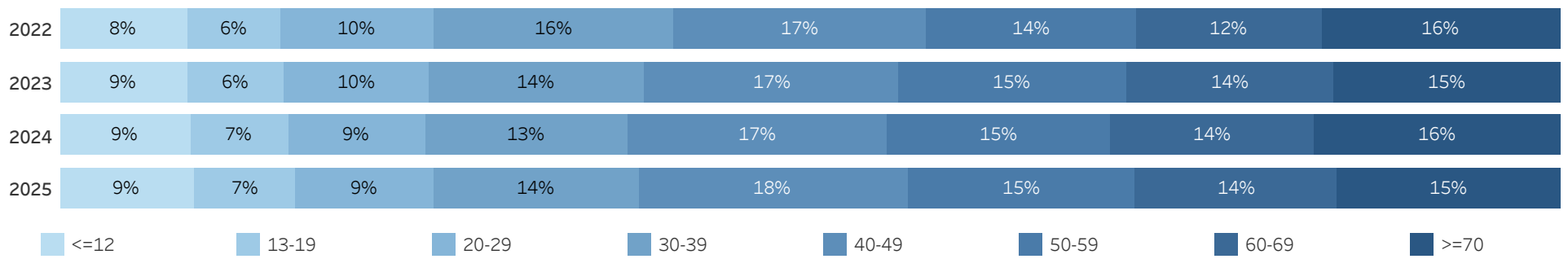


Regional Overview: South America (Continued)

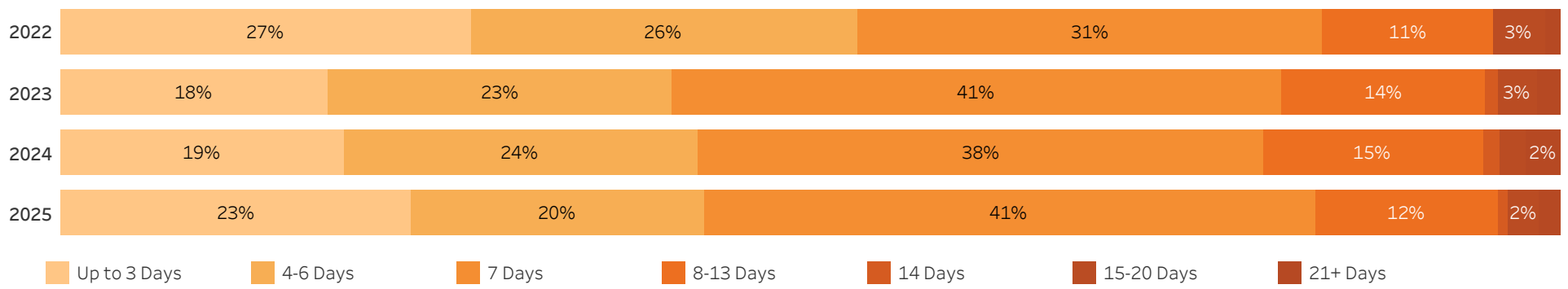
Average Age and Cruise Length by Destination / Trade Route, 2025



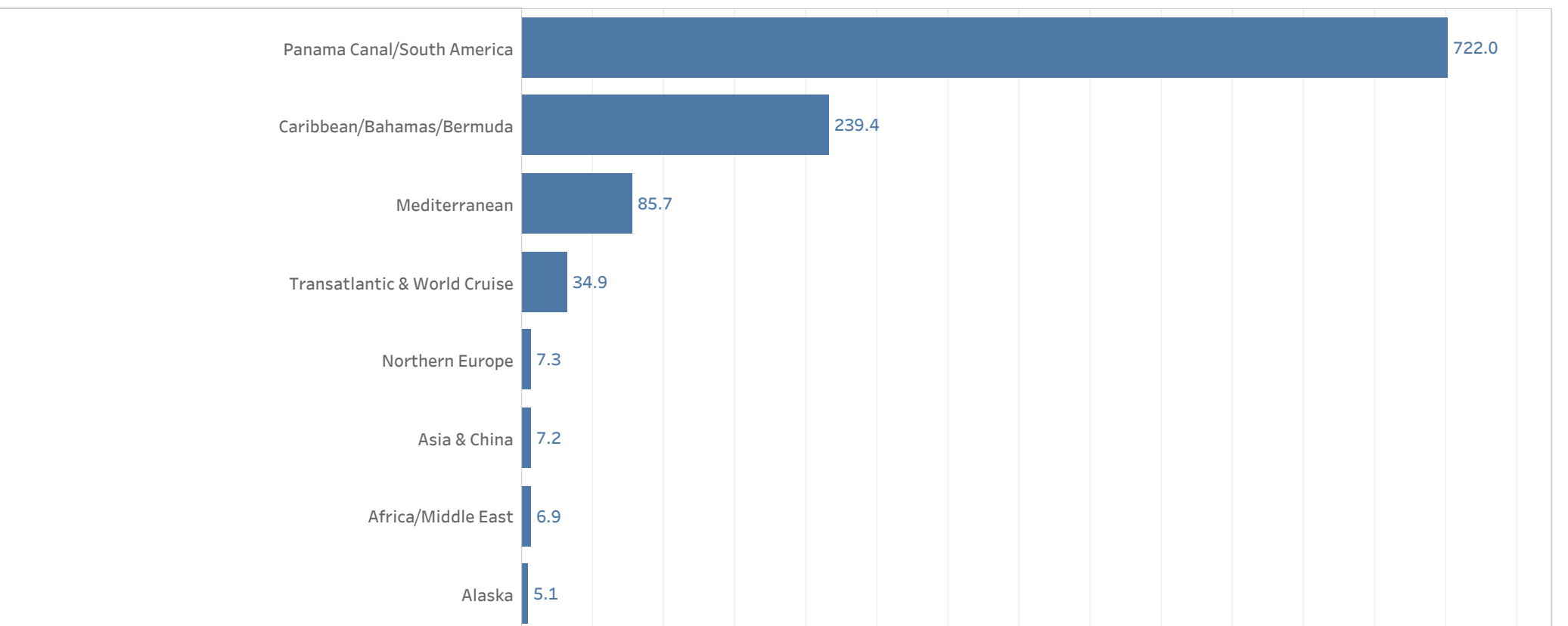
Average Passenger Age Groups



Average Cruise Duration



Volume of Passengers (in K) to Destinations, 2025
At least 4K Passengers per Destination

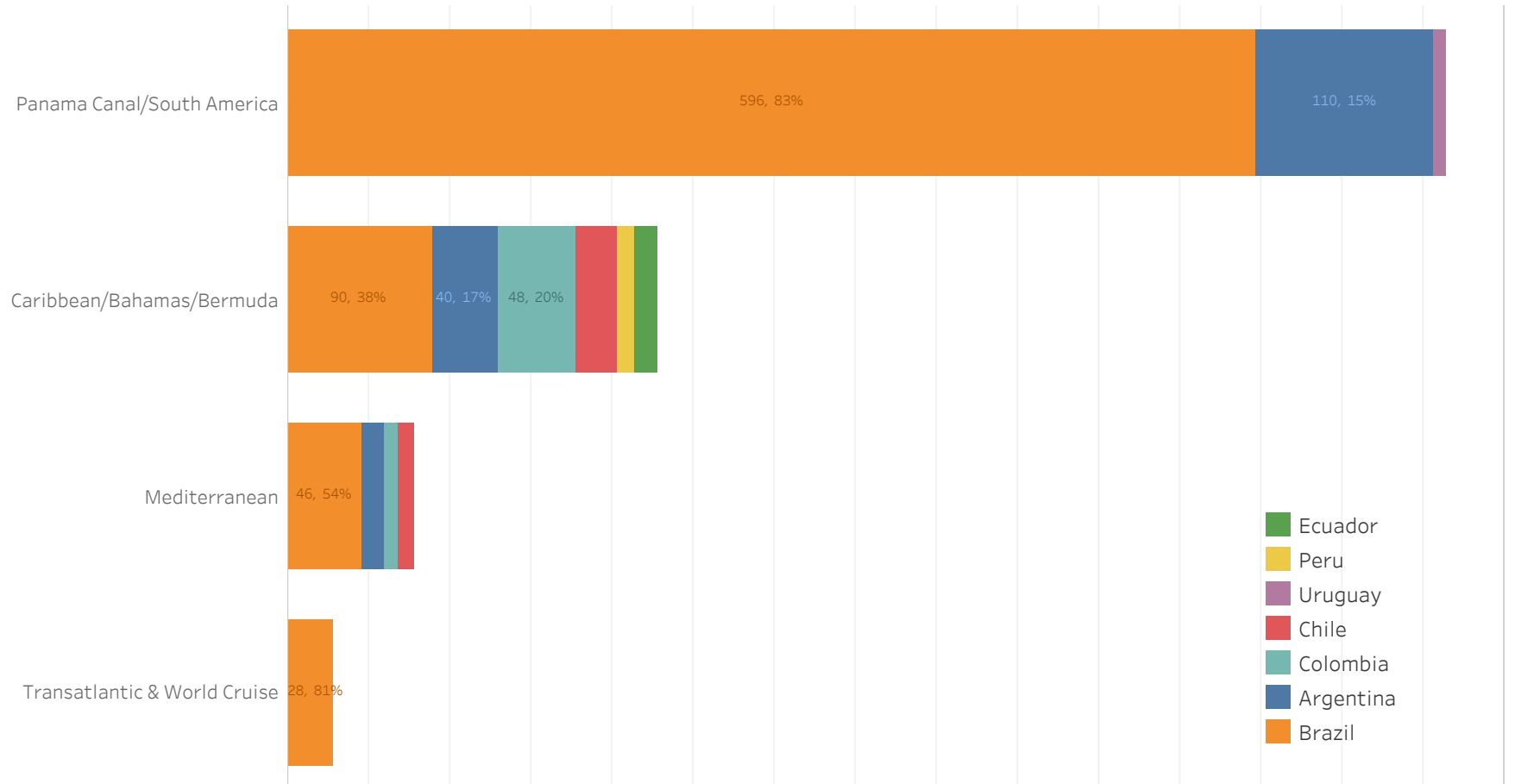


Regional Overview: South America (Continued)

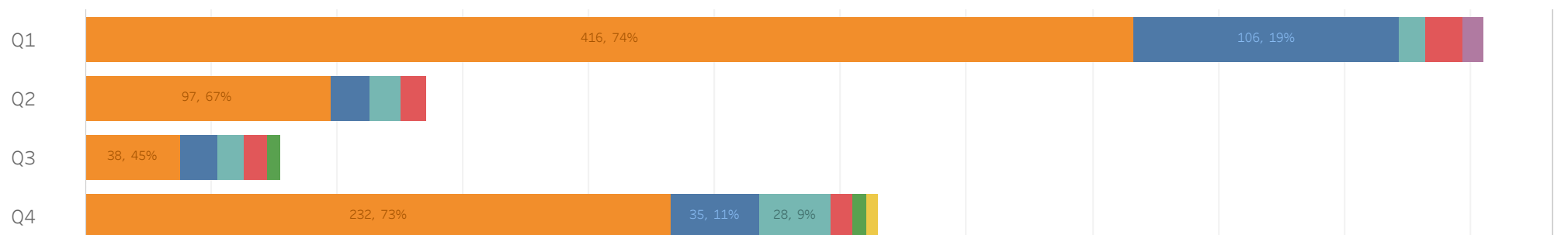
Passenger Volume by Trade (K)

	2022	2023	2024	2025
Panama Canal/South America	215.9	679.9 (214.8% ▲)	708.5 (4.2% ▲)	722.0 (1.9% ▲)
Caribbean/Bahamas/Bermuda	121.1	160.3 (32.4% ▲)	210.4 (31.2% ▲)	239.4 (13.8% ▲)
Mediterranean	52.6	82.6 (56.9% ▲)	82.7 (0.1% ▲)	85.7 (3.7% ▲)
Transatlantic & World Cruise	18.6	41.0 (120.8% ▲)	39.5 (-3.8% ▼)	34.9 (-11.6% ▼)
Northern Europe	4.2	9.5 (123.5% ▲)	8.1 (-14.3% ▼)	7.3 (-10.5% ▼)
Asia & China		5.0	5.1 (2.4% ▲)	7.2 (41.0% ▲)
Africa/Middle East	4.1	5.6 (37.5% ▲)	5.2 (-7.3% ▼)	6.9 (33.0% ▲)
Alaska			4.6	5.1 (11.7% ▲)

Passenger Volume (K) by Trade & Top Source Countries in 2025



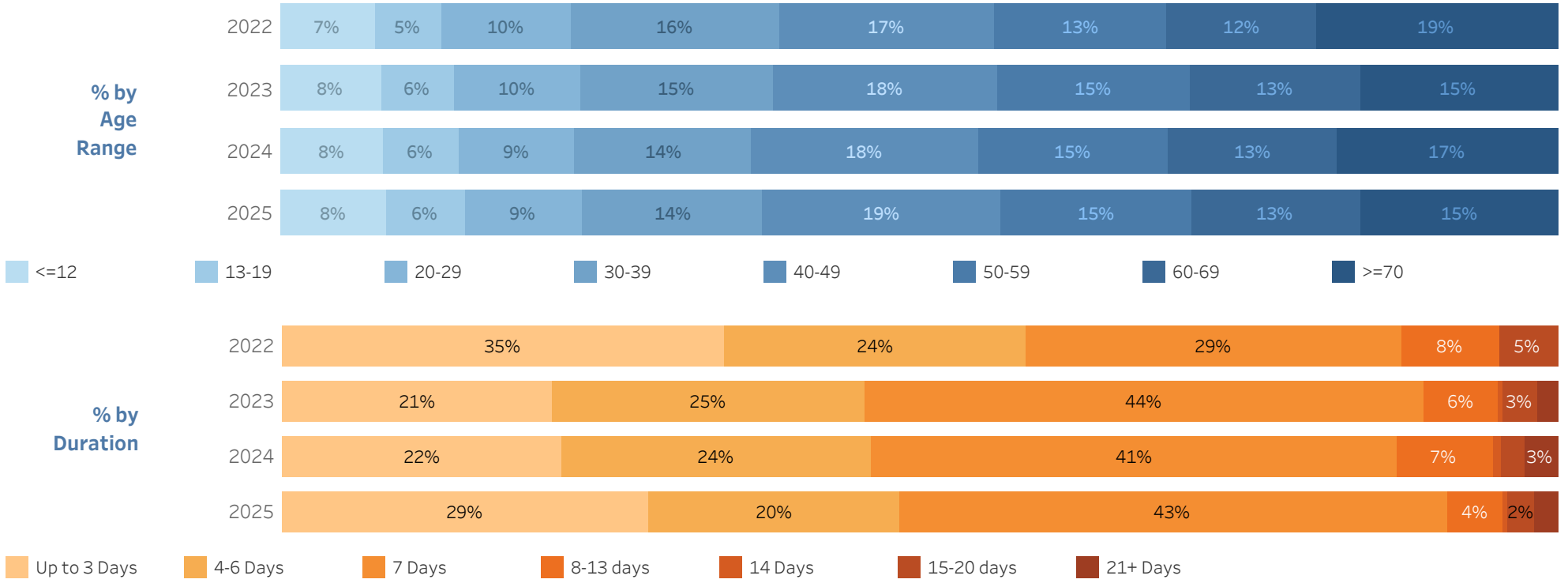
Passenger Volume (K) by Quarter & Top Source Countries



Source Market: Brazil

Passenger Volume (K)

2022	2023	2024	2025	Average Duration, in Days				Average Age			
2022	2023	2024	2025	2022	2023	2024	2025	2022	2023	2024	2025
283.1	740.5 (161.6% ▲)	775.7 (4.8% ▲)	783.8 (1.0% ▲)	5.6	6.2	6.4	5.8	43.6	44.7	44.9	44.6



Passenger Percentages by Trade Route / Destination

	2022	2023	2024	2025
South America	70.5%	78.5%	76.5%	76.4%
Caribbean	12.1%	8.7%	11.0%	11.5%
Mediterranean	9.4%	6.1%	6.1%	6.0%
Transatlantic/World Cruise	5.4%	4.5%	4.2%	3.6%
Africa/Middle East/Other	1.4%	0.8%	0.7%	1.0%
Northern Europe	1.2%	1.0%	0.7%	0.6%
Asia		0.4%	0.4%	0.5%
Alaska			0.3%	0.4%



Passenger Volume & YOY Change by Age Group

	Passenger				YOY			
	2022	2023	2024	2025	2022	2023	2024	2025
<=12	21	58	62	65	177%	7%	4%	
13-19	15	42	46	48	184%	9%	5%	
20-29	29	74	70	71	158%	-5%	2%	
30-39	46	112	108	111	142%	-4%	3%	
40-49	48	130	138	146	172%	6%	6%	
50-59	38	111	115	117	192%	3%	2%	
60-69	33	99	103	103	198%	3%	0%	
>=70	53	114	133	121	114%	17%	-9%	

Passenger Volume & YOY Change by Duration

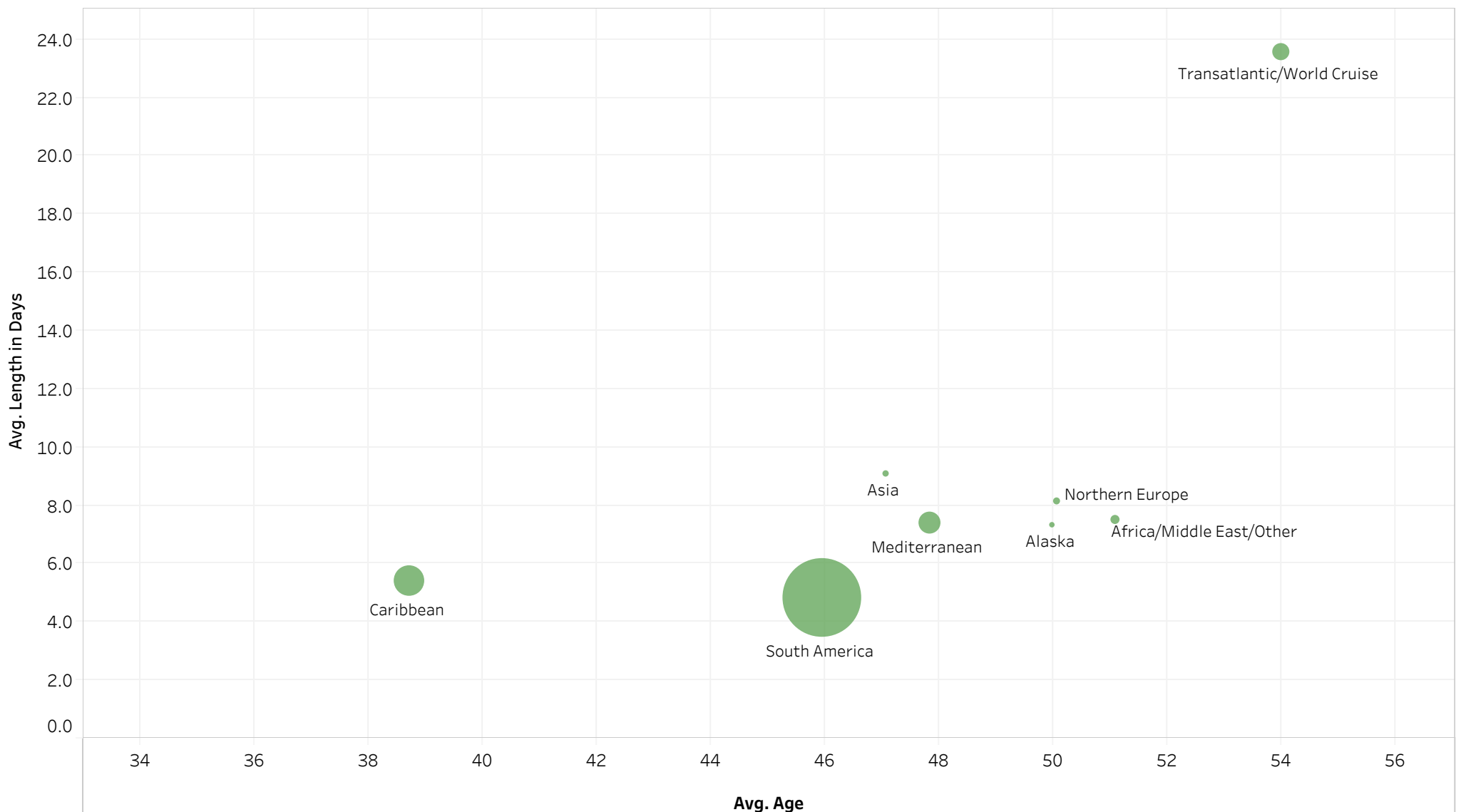
	Passenger				YOY			
	2022	2023	2024	2025	2022	2023	2024	2025
Up to 3 Days	97	157	170	225		62%	9%	32%
4-6 Days	67	182	188	155		173%	3%	-18%
7 Days	82	324	320	336		294%	-1%	5%
8-13 Days	22	43	58	35		97%	36%	-40%
14 Days		3	5	3			79%	-42%
15-20 Days	13	21	14	16		63%	-30%	13%
21+ Days		12	20	14			69%	-28%

Source Market: **Brazil** (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
South America	197	577	590	596	193%		2%	1%
Caribbean	34	64	85	90	89%		33%	6%
Mediterranean	26	45	47	47	71%		5%	-2%
Transatlantic/World Cruise	15	33	33	28	119%		-2%	-13%
Africa/Middle East/Other	4	6	5	8	46%		-4%	50%
Northern Europe	3	7	6	5	123%		-21%	-17%
Asia		3	3	4			5%	37%
Alaska			3	3				13%

Brazil, Average Age and Cruise Length by Trade Route, 2025



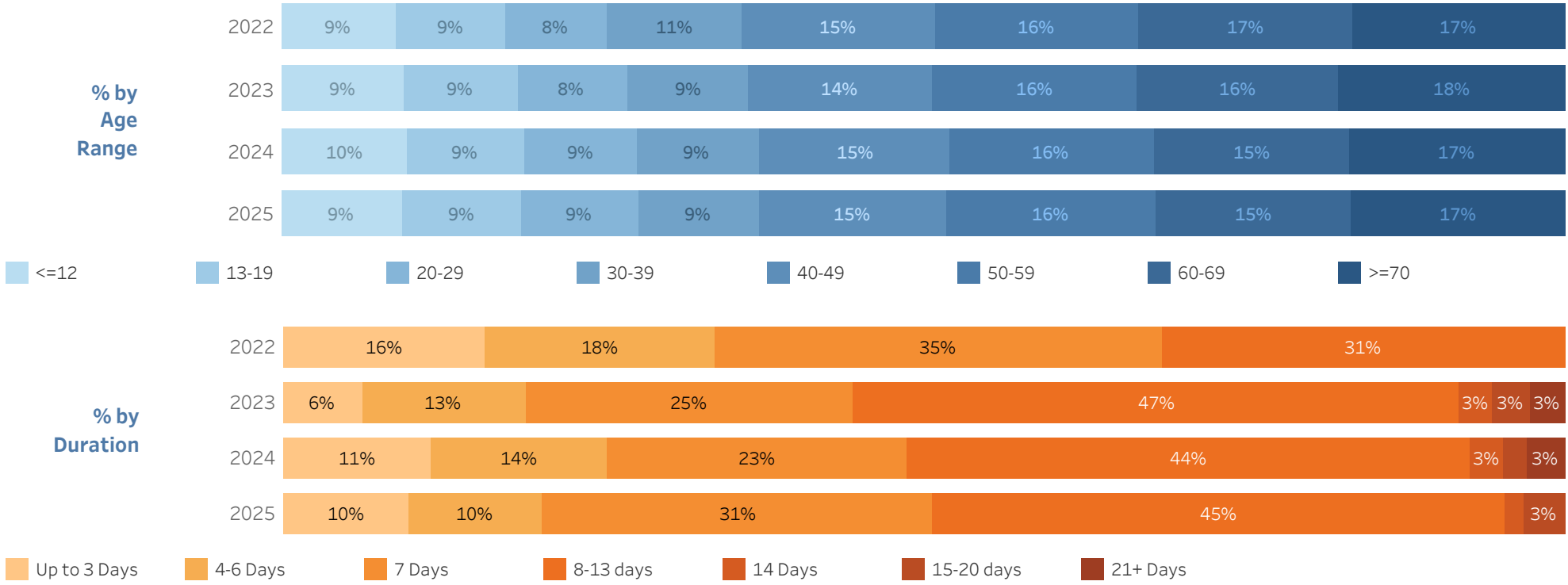
Data Points with Values Below 2,000 Passengers are not Displayed in the above Visuals and Tables.

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Source Market: Argentina

Passenger Volume (K)

2022	2023	2024	2025	Average Duration, in Days				Average Age			
2022	2023	2024	2025	2022	2023	2024	2025	2022	2023	2024	2025
40.8	129.8 (218.4% ▲)	141.9 (9.4% ▲)	171.1 (20.6% ▲)	8.1	9.2	8.7	8.4	47.3	46.7	46.3	46.3



Passenger Percentages by Trade Route / Destination

	2022	2023	2024	2025
South America	36.8%	65.7%	66.7%	64.8%
Caribbean	38.3%	19.4%	21.2%	24.1%
Mediterranean	18.6%	9.8%	7.9%	7.8%
Transatlantic/World Cruise	6.4%	5.1%	4.2%	3.3%



Passenger Volume & YOY Change by Age Group

	Passenger				YOY			
	2022	2023	2024	2025	2022	2023	2024	2025
<=12	4	12	14	16	241%	13%	15%	
13-19	3	12	13	16	236%	11%	23%	
20-29	3	11	12	16	241%	13%	26%	
30-39	4	12	13	16	188%	9%	20%	
40-49	6	19	21	25	203%	14%	18%	
50-59	6	21	22	28	221%	9%	24%	
60-69	7	20	22	26	200%	6%	21%	
>=70	7	23	24	28	241%	4%	20%	

Passenger Volume & YOY Change by Duration

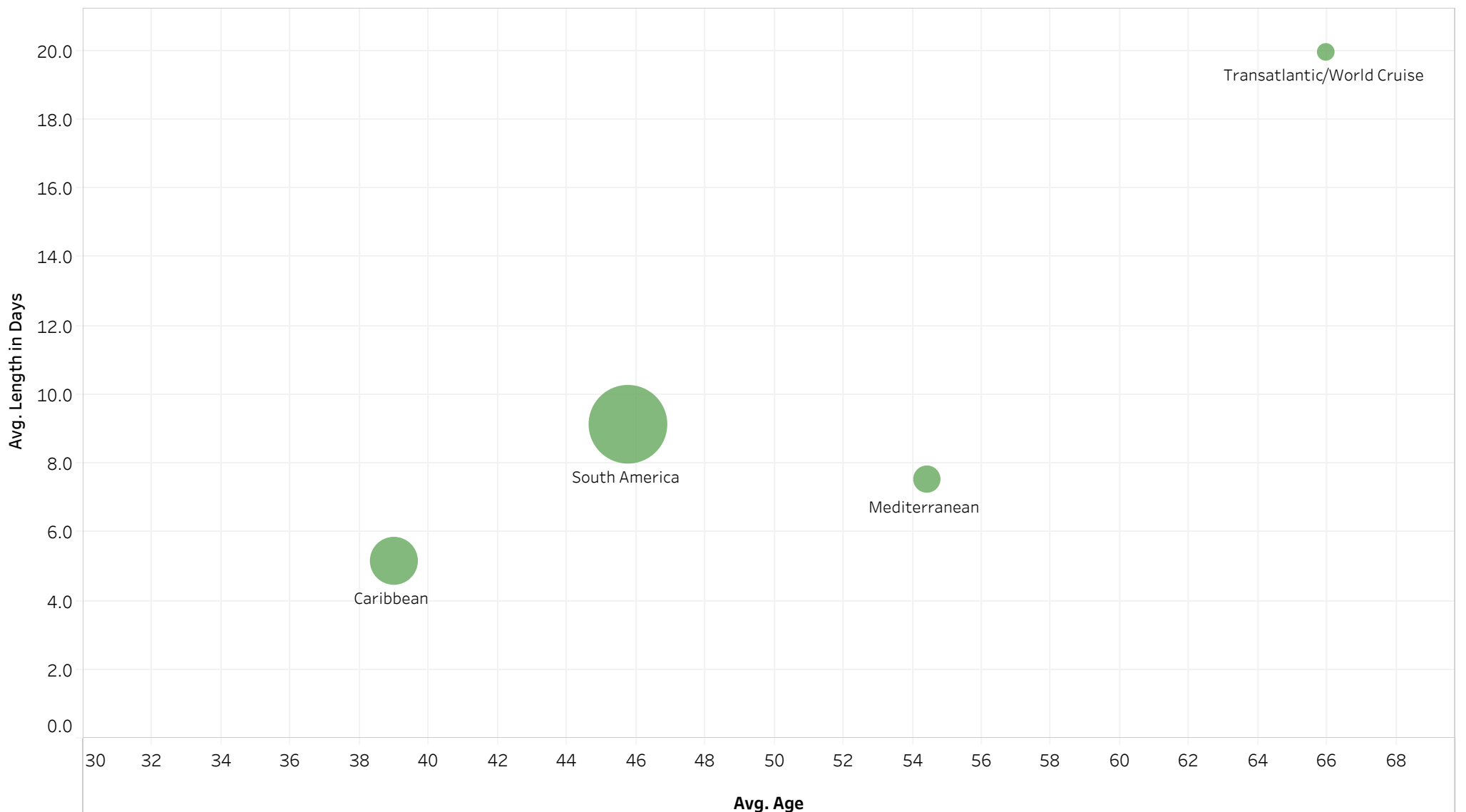
	Passenger				YOY			
	2022	2023	2024	2025	2022	2023	2024	2025
Up to 3 Days	6	8	16	17		37%	101%	2%
4-6 Days	7	16	20	18		142%	19%	-10%
7 Days	13	33	33	52		151%	0%	56%
8-13 Days	12	61	62	76		419%	2%	21%
14 Days		3	4	2			12%	-33%
15-20 Days		4	3	5			-30%	102%
21+ Days		3	4				17%	-100%

Source Market: **Argentina** (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
South America	14	83	93	108	477%		11%	17%
Caribbean	15	24	29	40	63%		20%	37%
Mediterranean	7	12	11	13	71%		-12%	19%
Transatlantic/World Cruise	2	6	6	5	161%		-11%	-6%

Argentina, Average Age and Cruise Length by Trade Route, 2025



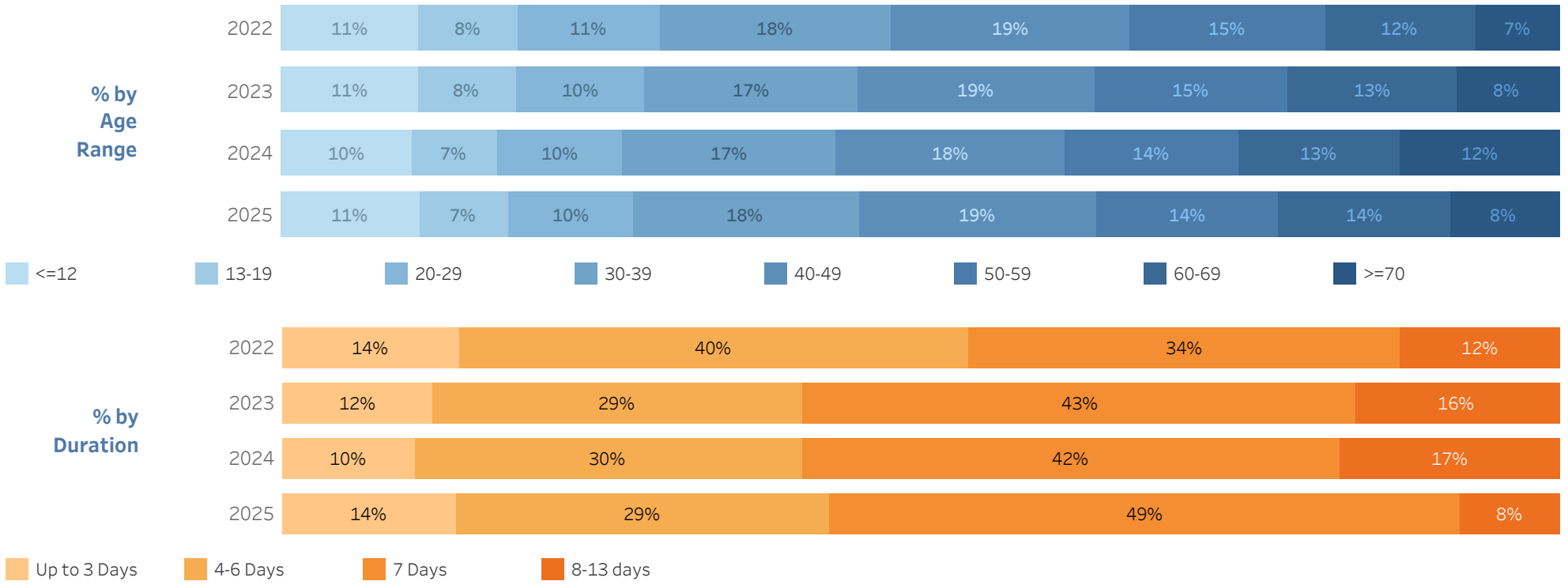
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Source Market: Colombia

Passenger Volume (K)

2022	2023	2024	2025	Average Duration, in Days				Average Age			
2022	2023	2024	2025	2022	2023	2024	2025	2022	2023	2024	2025
32.6	32.1 (-1.8% ▼)	55.1 (71.7% ▲)	61.5 (11.8% ▲)	6.0	6.6	6.6	6.0	40.5	41.8	43.5	42.0



Passenger Percentages by Trade Route / Destination

	2022	2023	2024	2025
Caribbean	75.7%	72.6%	75.6%	84.1%
Mediterranean	24.3%	27.4%	17.6%	15.9%
South America			6.8%	



Passenger Volume & YOY Change by Age Group

	Passenger				YOY			
	2022	2023	2024	2025	2022	2023	2024	2025
<=12	4	3	6	7	-1%	63%	18%	
13-19	3	2	4	4	-5%	50%	16%	
20-29	4	3	5	6	-11%	66%	13%	
30-39	6	5	9	11	-9%	71%	18%	
40-49	6	6	10	11	-2%	66%	16%	
50-59	5	5	8	9	-4%	55%	17%	
60-69	4	4	7	8	12%	62%	20%	
>=70	2	3	7	5	19%	170%	-25%	

Passenger Volume & YOY Change by Duration

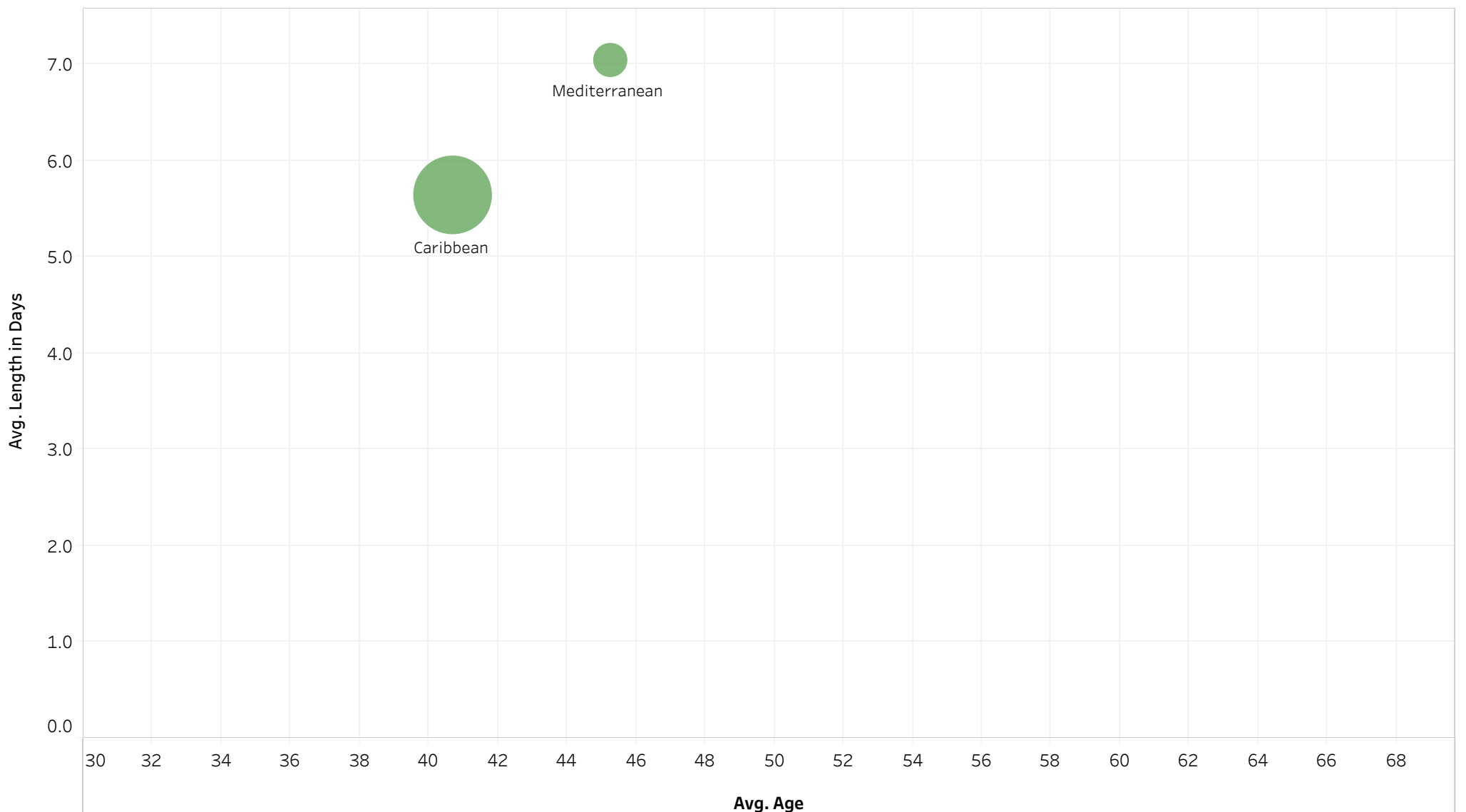
	Passenger				YOY			
	2022	2023	2024	2025	2022	2023	2024	2025
Up to 3 Days	5	4	6	8	-19%	54%	47%	
4-6 Days	13	9	16	18	-29%	80%	9%	
7 Days	11	14	23	30	24%	67%	32%	
8-13 Days	4	5	9	5	23%	87%	-49%	

Source Market: **Colombia** (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
Caribbean	23	21	39	48		-10%	92%	22%
Mediterranean	7	8	9	9		6%	18%	0%
South America			4					

Colombia, Average Age and Cruise Length by Trade Route, 2025

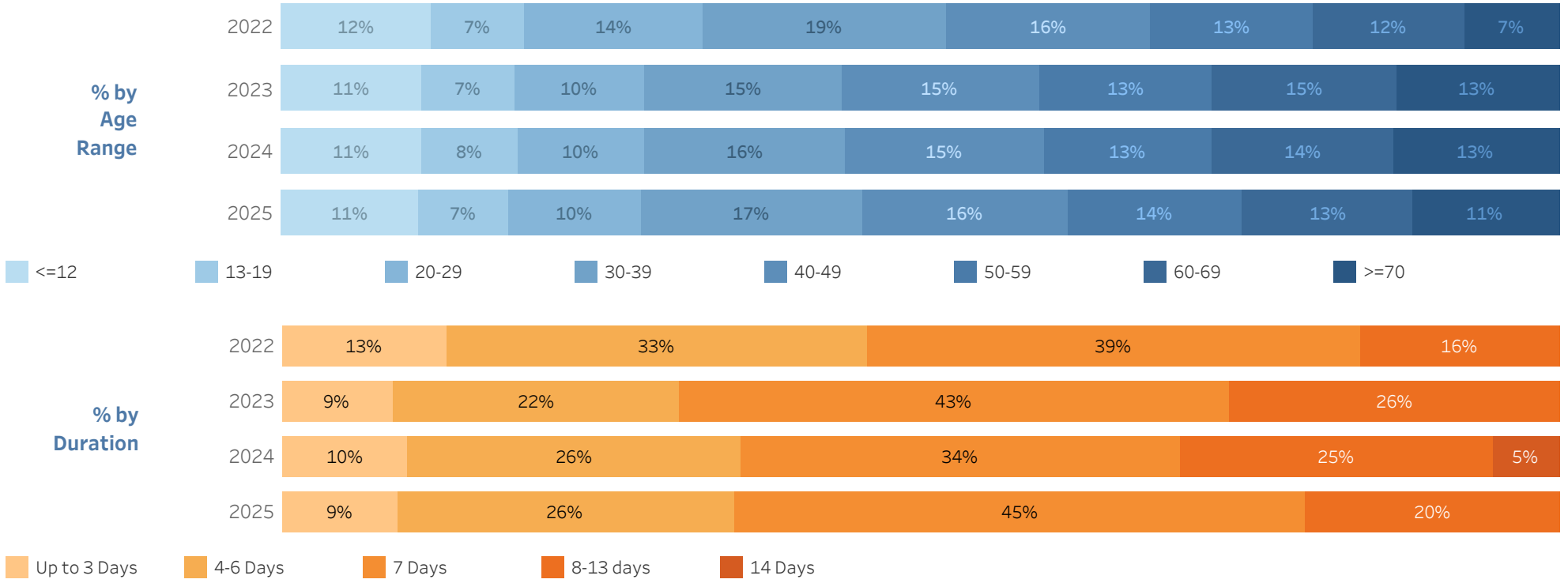


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Source Market: Chile

Passenger Volume (K)

2022	2023	2024	2025	Average Duration, in Days				Average Age			
2022	2023	2024	2025	2022	2023	2024	2025	2022	2023	2024	2025
30.9	41.3 (33.9%▲)	40.3 (-2.5%▼)	42.8 (6.2%▲)	6.4	7.6	7.5	7.1	40.1	43.8	43.8	43.1



Passenger Percentages by Trade Route / Destination

	2022	2023	2024	2025
Caribbean	81.7%	61.2%	61.2%	63.3%
Mediterranean	18.3%	25.9%	22.8%	26.1%
South America		12.8%	16.0%	10.6%



Passenger Volume & YOY Change by Age Group

	Passenger				YOY			
	2022	2023	2024	2025	2022	2023	2024	2025
<=12	4	5	4	5	25%	-3%	3%	
13-19	2	3	3	3	33%	2%	0%	
20-29	4	4	4	4	-2%	-6%	12%	
30-39	6	6	6	7	9%	-1%	17%	
40-49	5	6	6	7	29%	-2%	10%	
50-59	4	6	5	6	41%	-5%	10%	
60-69	4	6	6	6	65%	-5%	0%	
>=70	2	5	5	5	128%	0%	-6%	

Passenger Volume & YOY Change by Duration

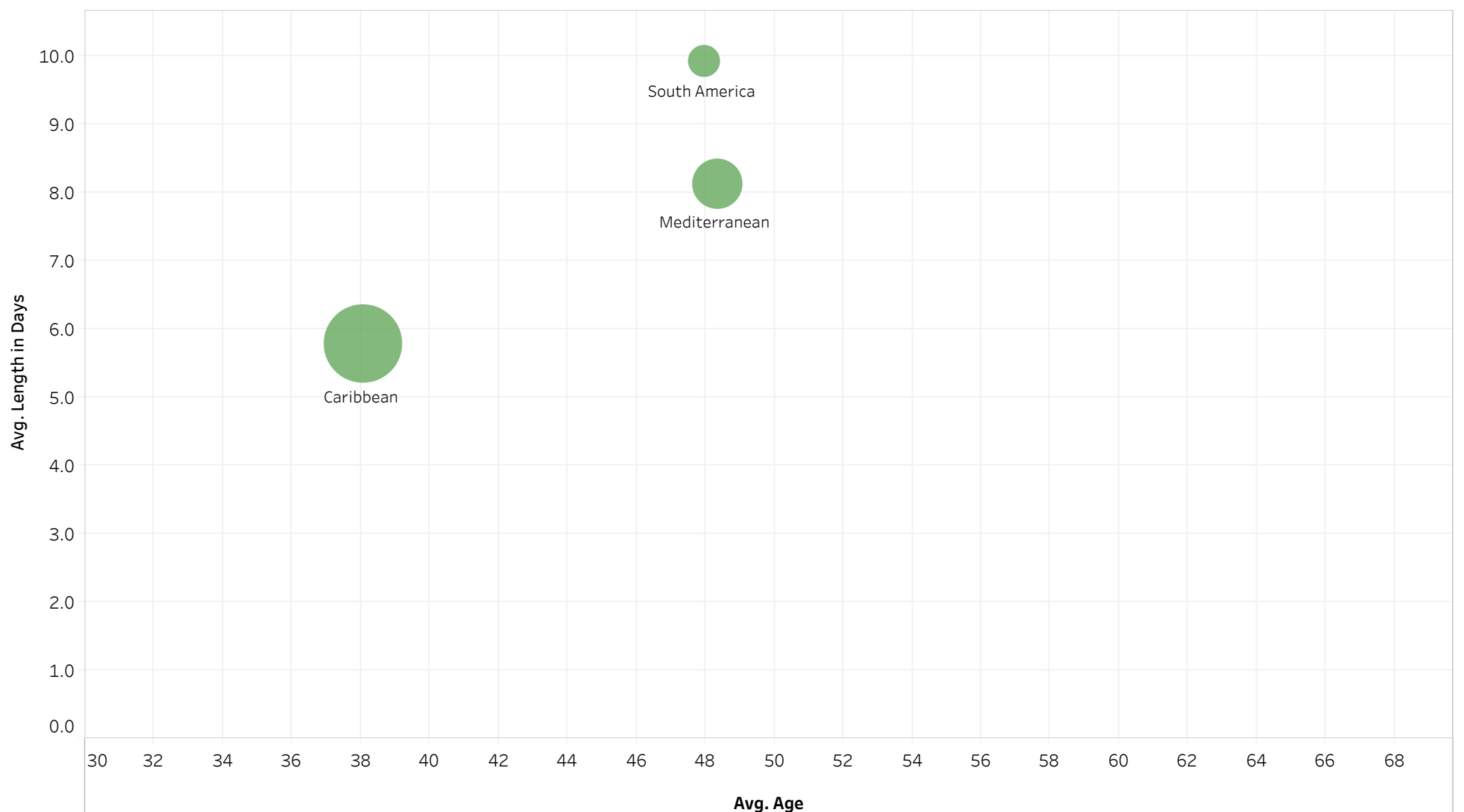
	Passenger				YOY			
	2022	2023	2024	2025	2022	2023	2024	2025
Up to 3 Days	4	3	4	4	-14%	14%	-3%	
4-6 Days	10	9	10	11	-13%	19%	5%	
7 Days	12	17	13	18	42%	-19%	35%	
8-13 Days	5	10	10	8	113%	-4%	-15%	
14 Days			2					-100%

Source Market: **Chile** (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
Caribbean	23	23	23	25		0%	-2%	8%
Mediterranean	5	10	8	10		90%	-14%	20%
South America		5	6	4			22%	-31%

Chile, Average Age and Cruise Length by Trade Route, 2025



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Source Market: Ecuador

Passenger Volume (K)

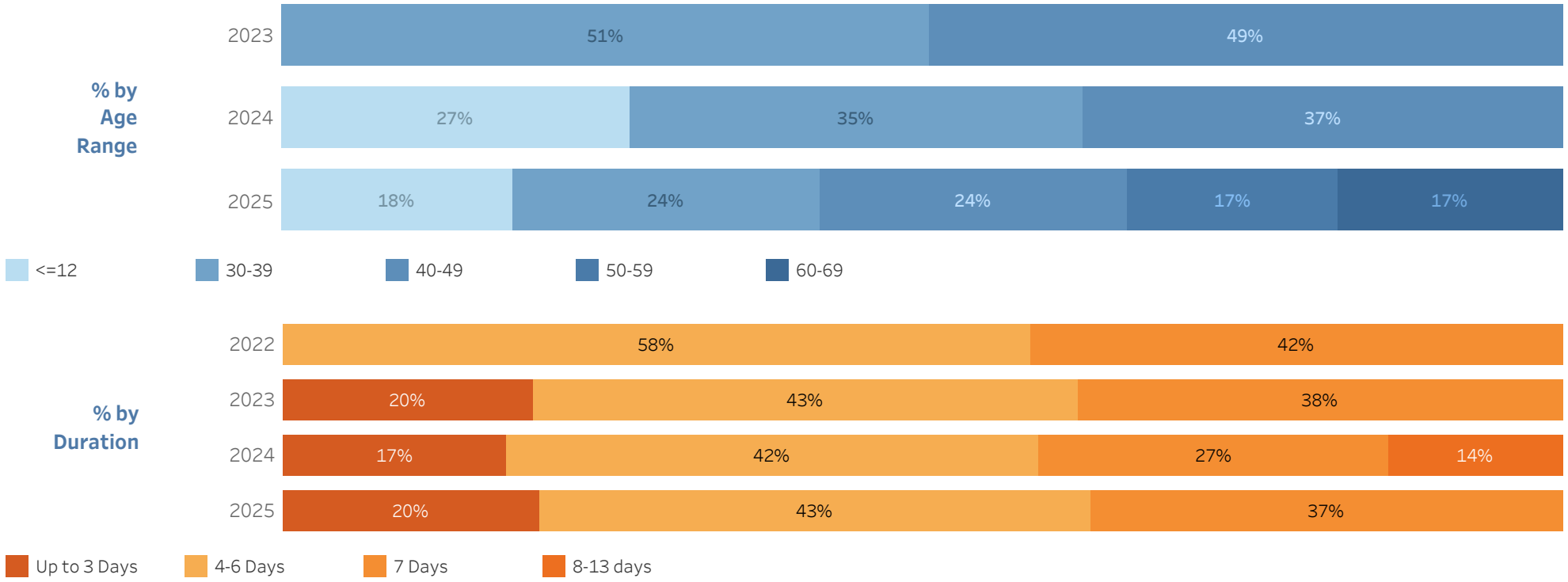
2022	2023	2024	2025
10.2	13.1 (28.5%▲)	15.2 (15.6%▲)	16.9 (11.1%▲)

Average Duration, in Days

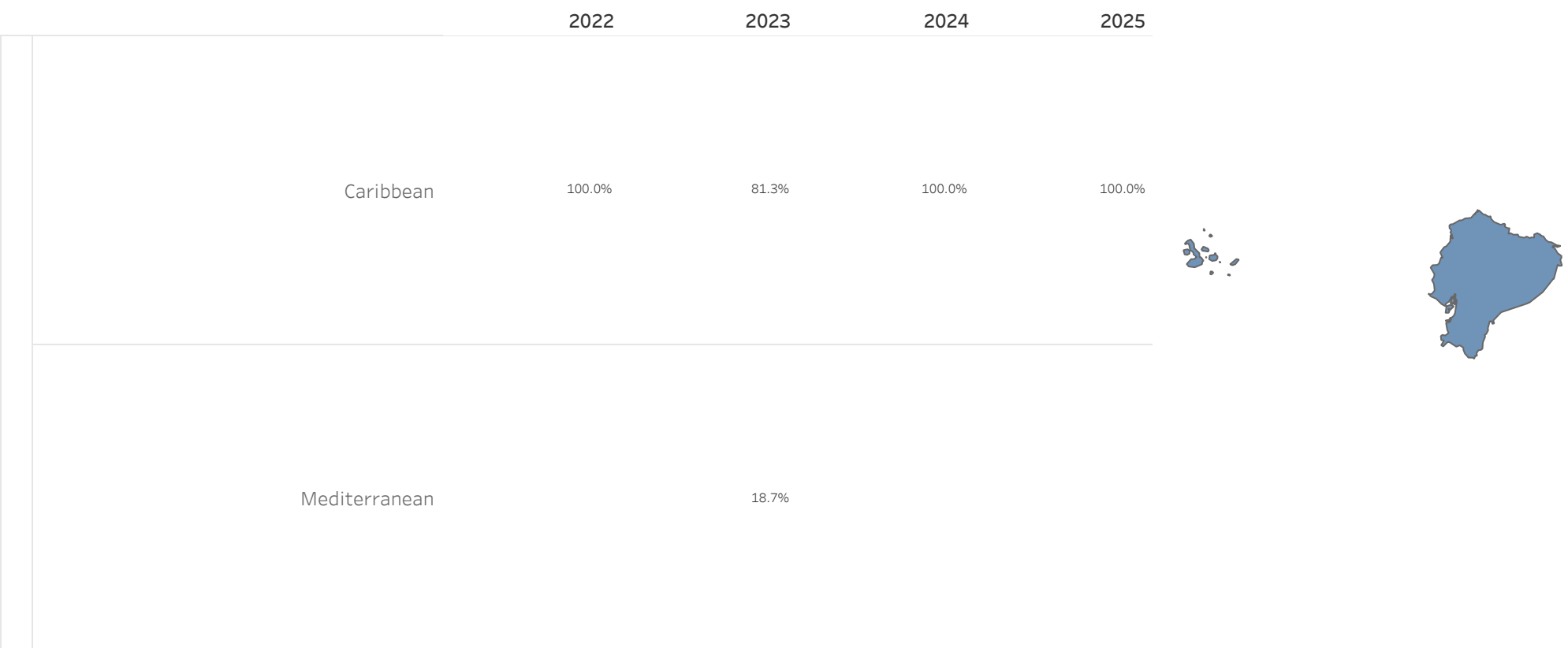
2022	2023	2024	2025
5.7	6.0	5.8	5.6

Average Age

2022	2023	2024	2025
40.6	41.4	41.0	41.3



Passenger Percentages by Trade Route / Destination



Passenger Volume & YOY Change by Age Group

	Passenger			YOY		
	2023	2024	2025	2023	2024	2025
<=12		2	2			9%
30-39	2	3	3		16%	12%
40-49	2	3	3		26%	6%
50-59			2			
60-69			2			

Passenger Volume & YOY Change by Duration

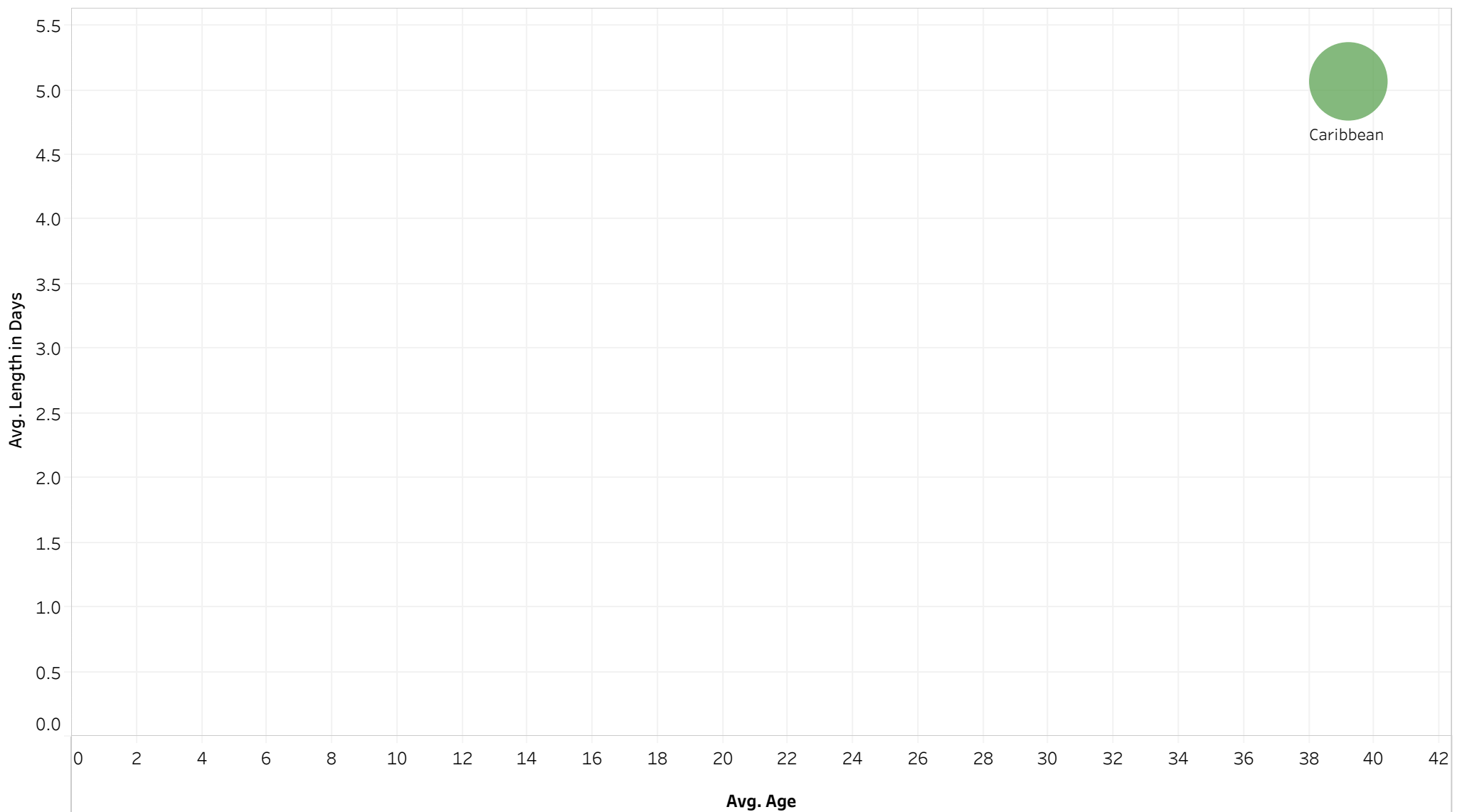
	Passenger				YOY			
	2022	2023	2024	2025	2022	2023	2024	2025
Up to 3 Days		2	3	3			21%	18%
4-6 Days	4	5	6	7		12%	32%	6%
7 Days	3	4	4	6		40%	-2%	38%
8-13 Days			2					-100%

Source Market: **Ecuador** (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
Caribbean	8	9	12	14	22%	27%	14%	
Mediterranean		2						

Ecuador, Average Age and Cruise Length by Trade Route, 2025



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