YOT.

MARKET INTELLIGENCE

ANNUAL OUTLOOK · EDITION ONE

The Global Yacht Charter Outlook 2027

The destinations, demand signals and emerging opportunities shaping yacht charter worldwide.

CONTENTS

What this report covers

Twelve charter regions assessed on one rubric, from public demand signals rather than private booking data. Every figure carries its source and date on the page where it appears.

12	5	10	2024-26
REGIONS ASSESSED	SCORECARD INDICATORS	PREDICTIONS ON THE RECORD	SOURCE WINDOW

EXECUTIVE SUMMARY

More choice. Less time to be chosen.

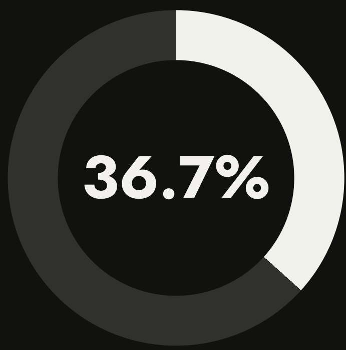
THE SCALE OF COMPETITION

2,300+

yachts over 20 metres make up the global charter fleet. Every enquiry is a shortlist drawn from thousands.

LUMENAUTICA FLEET ANALYSIS · JAN 2026

THE BOOKING WINDOW



of Q2 2026 booking activity was for same-month or next-month departures.

Within Northrop & Johnson's own booking dataset; not a measure of the whole market.

NORTHROP & JOHNSON · Q2 2026 REPORT

Charter clients have considerable choice, yet a meaningful proportion make decisions close to departure. For yachts, remaining visible throughout the season matters as much as generating interest before it begins.

Our 10 Key Findings

01

36.7%

Northrop & Johnson's Q2 2026 data showed that 36.7% of bookings were for departure in the same or following month.

02

Athens

Athens was the busiest embarkation location in Northrop & Johnson's Q2 2026 booking data, with 417 charter starts, more than twice any other port.

03

372→530

The Asia-Pacific fleet of yachts over 30 metres grew from 372 in 2022 to 530 in 2024.

04

5.2-7.8%

Greece's effective charter VAT rate compared with 21% in Spain and 22% in Italy.

05

-40%

Reported decline in Bahamas charter arrivals following the 2025 tax changes.

06

Two years

The yacht order book has contracted in unit numbers for two consecutive years while average yacht size has reached record levels.

07

Red Sea

Mediterranean-based yachts are beginning to transit into the Red Sea as new Saudi charter licences and destinations open the region.

08

€150-500k

Indicative weekly rates for polar expedition charters.

09

02.08.27

High-latitude and Red Sea charters connected to the August 2027 total solar eclipse are already being booked well in advance.

10

9-11%

Forecast annual growth in cabin and day-charter segments.

A market worth somewhere between 9 and 22 billion dollars

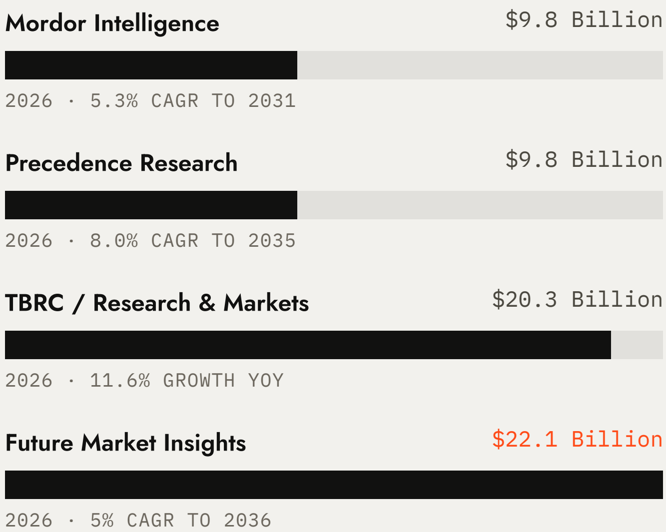
Four research firms published global charter market sizes in 2026 and they disagree by a factor of two. The spread is a scope problem: some count crewed superyacht charter only, others fold in bareboat, cabin and day charter. None discloses a full methodology publicly.

What the estimates agree on matters more than where they land. All four project growth through 2027, clustered between 5% and 11.6% annually. Europe carries roughly two thirds of global revenue in every estimate that splits by geography. Crewed charter is the revenue core, around 62% of the market in Mordor's segmentation, while cabin and day charter grow fastest.

Supply tells a cleaner story. BOAT International's Global Order Book 2026 records a second consecutive year of contraction in units on order, with average length and tonnage at record highs and slots at leading yards committed through 2028 to 2029. The charter fleet above 20 metres already numbers more than 2,300 vessels competing for attention.

YOT. analysis: growth plus scarce new tonnage means differentiation shifts from the yacht itself to how it is presented. In a fleet of 2,300, the marketing is the shortlist filter.

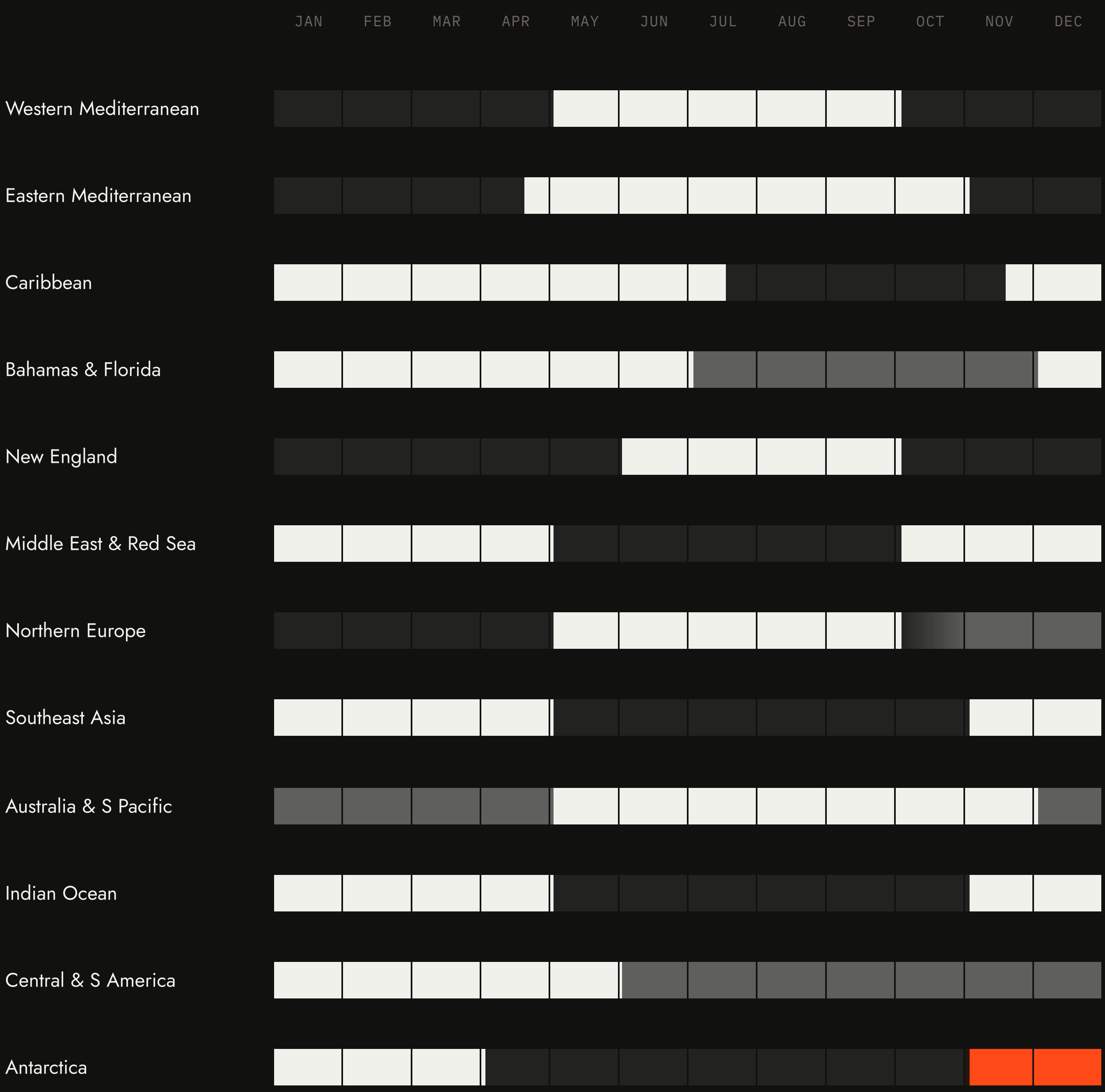
PUBLISHED MARKET-SIZE ESTIMATES · USD BN · 2025-26



Estimates differ because scope differs: inclusion of bareboat, cabin, day and crewed charter varies by firm and none publishes a complete methodology. Treat the range, not any single figure, as the market's size. Sources and links: page 22.

Somewhere is always in season

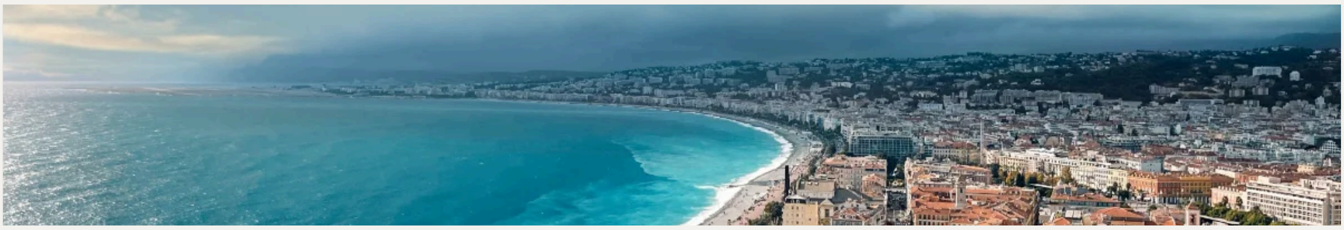
Principal charter seasons by region. Bars show the established operating season from published fleet availability and operator guidance; exact windows vary by itinerary and weather year.



PRINCIPAL SEASON SHOULDER / PARTIAL ANTARCTIC SEASON OPENS NOV · BOOKS A YEAR AHEAD

YOT. analysis from operator seasonal guidance and published fleet availability, 2024-26. Marketing point: a yacht's low season is always another region's peak. Content calendars should follow the water, not the office.

Western Mediterranean



The Riviera, the Balearics, Corsica and Sardinia remain the deepest charter market on earth. Monaco and Cannes ranked second and third for pickups in Northrop & Johnson's Q2 2026 booking data, IYC reports the West Med's 39% summer share as stable on 2025, and event weeks, the Grand Prix, the film festival, the September shows, still concentrate the highest-value demand of the year. The Monaco Yacht Show expects about 120 yachts this September, 43 of them 2026 deliveries.

The constraints are equally mature. Spain charges 21% charter VAT and Italy 22%, against Greece's certified 5.2 to 7.8%, a gap large enough to move itineraries. Berths in the golden triangle are scarce in peak weeks, anchoring restrictions tighten each season in French and Spanish posidonia zones, and competition is the fiercest anywhere: this is where most of the 2,300-strong fleet markets itself.

Outlook 2027: stable at the top, contested in the middle. Demand for 50m+ tonnage should hold with supply scarce. The 24 to 40m bracket, where most new deliveries land, faces the hardest fight for attention.

MARKETING IMPLICATIONS · YOT. ANALYSIS

Generic Riviera imagery is invisible here; every competitor has it. Differentiate on the specific: named coves, crew, food programmes, event-week logistics. Own one itinerary story deeply rather than the whole coast thinly, and publish rate-transparent content for the VAT-aware client who is comparing Italy with Greece.

INDICATIVE WEEKLY RATES

EUR 100k to 1m+

Published 40-70m listings; top of market far higher

ACCESS

Nice, Palma, Olbia; dense private aviation

SCORECARD · YOT. ANALYSIS · 1-5

Demand signals	■■■■■
Fleet availability	■■■■■
Infrastructure	■■■■■
Growth potential	■■□□□
Marketing opportunity	■■■□□

Scores are structured YOT. judgement from the public indicators on p22, rubric on p16. Not measurements.

REGION 02 · ESTABLISHED, RISING

SEASON MAY-OCT

Eastern Mediterranean

Athens was the busiest pickup location in Northrop & Johnson's Q2 2026 booking base, with 417 charter starts, more than twice any other port; in IYC's tracked summer bookings the East Mediterranean held a 45% share against the West Med's 39%, with Greece alone at 28%. Two independent brokerage datasets pointing the same way is the cleanest signal in this report. Greece pairs the Med's most favourable charter VAT, a 13% statutory rate cut to an effective 5.2 to 7.8% for certified yachts under Law 5073/2023, with dispersal capacity no other Mediterranean market can match: clients wanting quieter water can be routed to Sifnos, Naxos or the Ionian without leaving the fleet's operating area.

Croatia holds a 13% VAT line and Split ranks fourth for pickups in Northrop & Johnson's Q2 2026 booking data; Montenegro markets 0% VAT in its own waters; Turkey's gulet segment feeds the fast-growing cabin-charter format. Industry reporting in July 2026 flagged rising search interest in East Mediterranean charter, consistent with what the pickup tables already show.

Outlook 2027: the strongest established region. The tax gap with Spain and Italy is structural, the licensing regime is settling, and crowding in the Cyclades high season is the main risk to the experience.

MARKETING IMPLICATIONS · YOT. ANALYSIS

Clients comparing Greece against Italy or Spain respond to plain VAT arithmetic; publish it. Itinerary content should sell the lesser Cyclades and Ionian as the answer to overtourism headlines. Croatia and Montenegro yachts should target the value-conscious West Med client directly with like-for-like rate comparisons.

INDICATIVE WEEKLY RATES

EUR 235-450k+

50m+ motor yachts, Greece; Croatia typically 200-400k (George Yachts, May 2026)

WATCH ITEM

Greek charter licensing under Law 4926/2022; Cyclades congestion measures

SCORECARD · YOT. ANALYSIS · 1-5

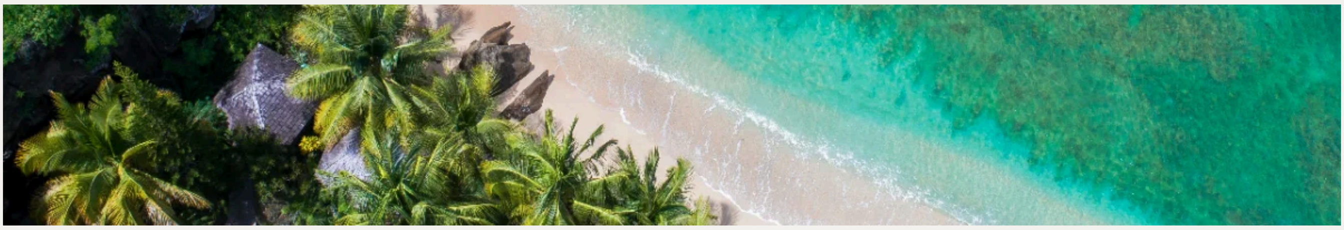
Demand signals	■■■■■
Fleet availability	■■■■□
Infrastructure	■■■■□
Growth potential	■■■■□
Marketing opportunity	■■■■□

Rubric on p16. VAT figures: georgeyachts.com and IYC, 2026.

REGION 03 · ESTABLISHED CORE

SEASON NOV-JUL · PEAK DEC-APR

Caribbean



The winter season is being redrawn from within. With the Bahamas losing fleet to tax and procedure changes, industry reporting through early 2026 describes displaced charter and private yachts circulating the established Eastern Caribbean chains instead, lifting transient traffic through the Antigua, St Martin and St Lucia corridor. Antigua and St Lucia are both reporting renewed demand.

IYC's tracked 2025/26 winter closed up about 10% year on year, with the Caribbean holding roughly 45% of winter activity. The regional calendar concentrates hard: roughly 70% of crewed charters fall between December and April, and event weeks, St Barths New Year and Bucket, Antigua Sailing Week, still set the peak. The Antigua Charter Yacht Show moved to 6-12 December to accommodate more yachts, a supply-side signal in itself. The Caribbean welcomed around 35 million visitors in 2025, so the destination demand base is broad even where charter data is thin.

Outlook 2027: strong season, shifting map. Winter demand looks solid; which islands capture it is now genuinely in play for the first time in years.

MARKETING IMPLICATIONS · YOT. ANALYSIS

Yachts repositioning from the Bahamas need Eastern Caribbean content now, not in November: itineraries, anchorages, provisioning stories. BVI-style first-charter content converts the entry client; corridor islands (St Kitts, St Lucia) should court transient yachts with berth and logistics content brokers can forward.

INDICATIVE WEEKLY RATES

USD 65k to 500k+

Published listings, 34m from $65k/wk + expenses to large-yacht peak weeks

WATCH ITEM

Hurricane season Jun-Nov shapes insurance and positioning; island fee regimes diverging

SCORECARD · YOT. ANALYSIS · 1-5

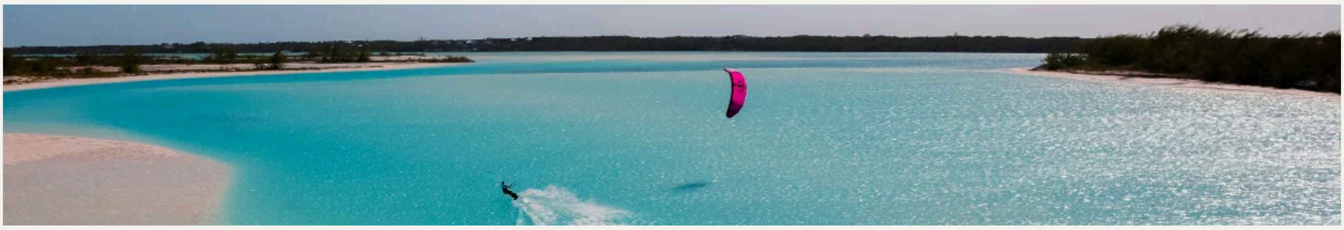
Demand signals	■■■■□
Fleet availability	■■■■□
Infrastructure	■■■■□
Growth potential	■■■□□
Marketing opportunity	■■■■□

Season and visitor figures: CTO via vitalcharters (2026); corridor reporting: YachtCharterFleet, Port Zante (2026).

REGION 04 · ESTABLISHED, DISRUPTED

BAHAMAS NOV-JUN · FLORIDA YEAR-ROUND

The Bahamas and Florida



The sharpest lesson of the 2025-26 winter came from Nassau. After new boating taxation and procedures took effect, industry reporting put Bahamas charter arrivals down roughly 40%, and the 2026 Bahamas Charter Yacht Show was cancelled outright: fewer than 20 yachts registered against 40 the year before, and the lead sponsor withdrew. Bahamian authorities are reportedly reassessing the changes, but the fleet had already voted with its hulls.

Florida is the stabiliser. Miami operates year-round with no narrow high season, greater Fort Lauderdale accounts for an estimated 35 to 40% of US brokerage activity, and FLIBS is followed by a reported 25 to 30% uplift in Caribbean charter bookings in the following 90 days. Nassau still ranked fifth globally for Q2 2026 pickups; the market is wounded, not dead.

Outlook 2027: a recovery play with policy risk. If taxation is walked back, the Bahamas' proximity advantage reasserts quickly. Until then, planning stays week-to-week.

MARKETING IMPLICATIONS · YOT. ANALYSIS

Clients read headlines; yachts still committed to the Bahamas should publish plain-language guidance on what the fee changes actually cost a charterer, because clarity converts where uncertainty stalls. Florida-based yachts should sell the year-round calendar and short-notice availability that the collapsed booking window rewards.

INDICATIVE WEEKLY RATES

USD 60k to 400k+

Published listings; Exumas peak weeks at the top of the range

WATCH ITEM

Bahamian tax reassessment; verify the 40% arrivals figure against official statistics before quoting

SCORECARD · YOT. ANALYSIS · 1-5

Demand signals	■■■□□
Fleet availability	■■■■□
Infrastructure	■■■■■
Growth potential	■■■□□
Marketing opportunity	■■■■□

Show cancellation: The Triton, Dec 2025. Arrivals and Florida estimates: industry reporting, single-source, flagged on p22.

Middle East and Red Sea

No region is being built faster. The opening of Sindalah's superyacht marina and updated Saudi charter licences turned a closed coastline of over 1,200 islands into a bookable destination, and named Mediterranean charter yachts, O'Pari and Emir among them, transited the Suez Canal for late-2025 Red Sea work. Knight Frank's 2026 Wealth Report describes the Gulf as yachting's rising power centre, with the Amala development following Sindalah and marina capacity growing across Dubai, Abu Dhabi and Qatar.

The proposition is seasonal arithmetic: Red Sea water stays warm well into late autumn, so a Med-based yacht can extend its earning season by months without crossing an ocean. Diving is the anchor experience; AlUla, Petra and Wadi Rum give itineraries cultural depth no new marina can manufacture.

Outlook 2027: infrastructure ahead of demand, deliberately. Fleet presence will grow before client familiarity does. The gap between the two is where early movers profit.

MARKETING IMPLICATIONS · YOT. ANALYSIS

This is a client-education market. Almost nobody knows what a Red Sea charter week looks like; the yacht that explains it first, with real itineraries, real dive sites and honest logistics, defines the category. Season-extension content aimed at owners and their managers is as valuable as client-facing material.

INDICATIVE WEEKLY RATES

Sparse published data

Fleet too new for meaningful ranges; expect Med-comparable rates on transiting tonnage

WATCH ITEM

Charter licensing scope; Suez transit security and insurance costs

SCORECARD · YOT. ANALYSIS · 1-5

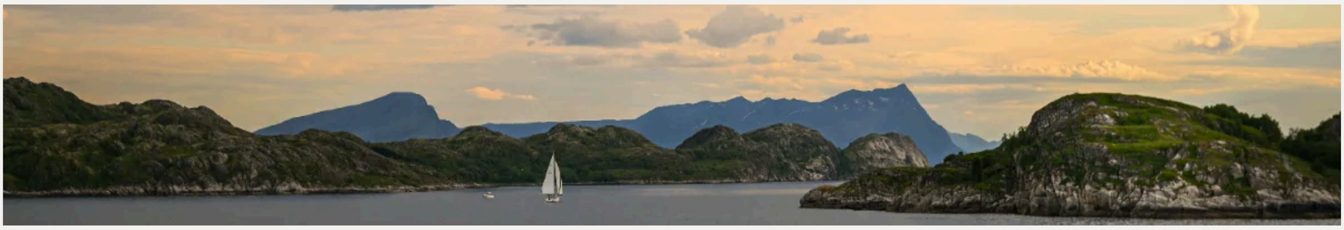
Demand signals	■■■□□
Fleet availability	■■□□□
Infrastructure	■■■■□
Growth potential	■■■■■
Marketing opportunity	■■■■■

Sources: Megayacht News (Dec 2025), IYC (2026), Knight Frank via Elite Traveler (Apr 2026).

REGION 06 · EXPEDITION-LED GROWTH

SEASON MAY-SEP · WHALES NOV-JAN

Northern Europe



Norway has become the proof that charter growth no longer requires warm water. Fjord itineraries, Lofoten, Svalbard and the northern-lights winter run on a different calendar to everything else in Europe, and the winter whale season off Skjervoy and Tromso, with 30 to 50 whales sighted on strong days, has created a genuine second season. The 88m expedition yacht ARCTIC is running Norway into May 2026, a Med summer, then Norway, Iceland and Greenland from October 2026 to May 2027 at a published EUR 490,000 to 590,000 per week, and is already taking bookings for the 2 August 2027 total solar eclipse.

The Baltic and the fjords also benefit from a climate-era reframing: cool-water summers are becoming a selling point as Mediterranean heatwaves make July headlines. Supply is the constraint; the ice-capable, cold-water fleet is small and books far ahead.

Outlook 2027: demand exceeds capable supply. The eclipse, midnight-sun summers and whale winters give 2027 three marketable moments.

MARKETING IMPLICATIONS · YOT. ANALYSIS

Sell moments, not maps: eclipse week, orca season, midnight sun. This is film territory; cold-water footage differentiates instantly in feeds full of turquoise. Capable yachts should publish their ice class and expedition credentials plainly, because clients cannot shortlist what they cannot verify.

INDICATIVE WEEKLY RATES

EUR 150-590k

Expedition bracket to ARCTIC's published rate (Jul 2026)

WATCH ITEM

Norwegian fjord zero-emission requirements phasing in; Svalbard access rules

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SCORECARD · YOT. ANALYSIS · 1-5

Demand signals	■■■■□
Fleet availability	■■□□□
Infrastructure	■■■□□
Growth potential	■■■■□
Marketing opportunity	■■■■□

Rates and schedule: yachtsmen.com (Jul 2026). Whale counts: operator reporting citing Norwegian IMR.

Southeast Asia

The raw material is unmatched: Indonesia alone has more than 17,000 islands, and Raja Ampat's reefs carry some of the highest marine biodiversity recorded anywhere. The region's active 30m+ fleet grew from 372 yachts in 2022 to 530 in 2024 and may pass 600 by the end of 2026, with more than 20% exceeding 50 metres against 16% worldwide. Thailand and the Philippines are building charter propositions alongside Indonesia's established Phinisi fleet, a locally distinctive product no other region can copy.

The gate is regulatory. Knight Frank's 2026 Wealth Report names Indonesian charter law and infrastructure as the deciding variables; cabotage rules and licensing complexity still keep much foreign tonnage out. Distance is the other honest constraint: this is a long-haul destination for the core European and American client base.

Outlook 2027: growth continues, gated by law. Any liberalisation of Indonesian charter rules would be the single biggest destination event of the year.

MARKETING IMPLICATIONS · YOT. ANALYSIS

Underserved by high-quality digital content relative to interest; most material is dive-blog or generic-luxury. The openings: honest logistics content (getting there, seasons, permits), Phinisi storytelling as a category of its own, and combination itineraries that pair Singapore or Bali access with remote water.

INDICATIVE WEEKLY RATES

USD 50-350k

Phinisi charters to large expedition tonnage, published listings

WATCH ITEM

Indonesian charter licensing and cabotage; Raja Ampat visitor management

SCORECARD · YOT. ANALYSIS · 1-5

Demand signals	■■■■□
Fleet availability	■■■□□
Infrastructure	■■□□□
Growth potential	■■■■■
Marketing opportunity	■■■■■

Fleet figures: APSA via Lumenautica (Jan 2026). Regulatory framing: Knight Frank via Elite Traveler (Apr 2026).

Emerging and specialist grounds

08

New England and North America

SEASON JUN-SEP

A mature, quiet market anchored on Newport, Nantucket, Martha's Vineyard and Maine. Demand is domestic, repeat-heavy and event-linked; the fleet is a summer migration from Florida and the Caribbean. America's Cup and regatta summers periodically spike interest.

MARKETING ANGLE

Sell the season's brevity as urgency. Food, sailing heritage and fog-and-shingle atmosphere photograph unlike anything in the Med; use that contrast.

09

Australia and the South Pacific

WHITSUNDAYS MAY-OCT · TAHITI APR-NOV

Tahiti, Fiji and the Whitsundays pair world-class water with thin fleets and long transits. IYC reports South Pacific bookings up about 50% year on year in its 2026 mid-year data, from a small base, and Australian infrastructure investment continues, but distance keeps supply scarce.

MARKETING ANGLE

The client here is buying a once-in-a-decade trip. Long-form content and film earn the multi-week booking; a rate card does not.

10

Indian Ocean

MALDIVES & SEYCHELLES NOV-APR

The Maldives and Seychelles run counter-seasonal to the Med and increasingly capture winter tonnage transiting via the Red Sea. IYC's mid-year 2026 data shows Indian Ocean bookings up about 40% year on year, from a small base. Resort-brand familiarity lowers the education barrier; atoll cruising and diving are the product. Fleet remains modest but growing.

MARKETING ANGLE

Position against the overwater villa: same water, private route. Winter-sun search demand is high and largely unanswered by charter content.

The far edges of the map

11

Central and South America

GALAPAGOS YEAR-ROUND · COSTA RICA DEC-APR

The Galapagos and Norway are named together in 2026 trend reporting as the proven nature-led destinations, and explorer tonnage is returning to Central America; PLANET NINE rejoined the market there after a 2026 refit. Strict permitting in the Galapagos caps supply permanently, which protects both the experience and the rate.

MARKETING ANGLE

Permit scarcity is the story: few yachts can legally do this. Wildlife credibility beats luxury framing; partner with science and say so plainly.

12

Expedition and Antarctica

ANTARCTIC SEASON NOV-MAR

Expedition charter moved from niche to mainstream in 2025. Ice class, helicopters and submersibles are now selling points; polar weeks run EUR 150,000 to 500,000; one research firm sizes the expedition segment at USD 3.2bn in 2025 growing at 7.8% annually. Antarctic expedition-cruise occupancy above 90%, with cabins selling earlier each season, is the nearest public proxy for charter demand.

MARKETING ANGLE

Book-early messaging is now factual, not tactical. Capability content (ice class, expedition crew, IAATO membership) does the converting; scenery photos are table stakes.

WHERE THE WORLD MAY CHARTER NEXT · YOT. PREDICTION

Watch Japan. Marine infrastructure investment, easing rules and state promotion are assembling the conditions the Red Sea had in 2023.

Basis: Knight Frank Wealth Report 2026 commentary. No charter fleet data yet exists; this is interpretation, not measurement.

COMPARISON

Twelve regions, one rubric

REGION	DEMAND SIGNALS	FLEET	INFRASTRUCTURE	GROWTH POTENTIAL	MARKETING OPPORTUNITY
Western Mediterranean	5	5	5	2	3
Eastern Mediterranean	5	4	4	4	4
Caribbean	4	4	4	3	4
Bahamas & Florida	3	4	5	3	4
New England & N America	3	2	4	2	3
Middle East & Red Sea	3	2	4	5	5
Northern Europe	4	2	3	4	4
Southeast Asia	4	3	2	5	5
Australia & South Pacific	3	2	3	4	4
Indian Ocean	3	2	3	4	4
Central & South America	3	1	2	4	4
Expedition & Antarctica	4	1	2	4	4

HOW SCORES ARE MADE

Each score is a 1 (weak) to 5 (strong) YOT. judgement against the same question set per indicator. Demand signals: pickup and booking data, search interest, trend reporting. Fleet: advertised charter supply in region. Infrastructure: marinas, provisioning, air access. Growth potential: headroom given regulation, capacity and investment. Marketing opportunity: gap between demand signals and the quality of existing destination content.

WHAT THEY ARE NOT

These are structured expert assessments, not measurements, and carry no decimal precision because none exists. Two regions with the same score are comparable in kind, not identical in fact. The underlying indicators and their sources are listed on page 22; anyone can re-score from the same evidence and argue with us.

What charter clients increasingly want

01 **Multigenerational groups**

Family and multigenerational trips are the most consistently cited demand shift of 2025-26. It changes the product: cabin count and flexible spaces matter more than top speed, and the booker is often not the payer.

02 **Expedition without endurance**

Remote water with full comfort: glacier hiking from the aft deck, Raja Ampat diving with a spa on board. The client wants the story of an expedition and the sleep of a hotel.

03 **Wellness as a programme**

Themed weeks, from retreat-style wellness to milestone celebrations, gained momentum through 2025. A named programme with a named practitioner converts; the word wellness alone does not.

04 **Event weeks**

Monaco Grand Prix, Cannes, the regatta calendar and one-off spectacles like the August 2027 eclipse concentrate the year's highest-value bookings into known dates. The calendar is public; the planning advantage goes to whoever markets against it first.

05 **Late decisions, high expectations**

With 36.7% of bookings made for same-month or next-month departure, clients research fast and expect complete answers immediately: real availability, real rates, real itineraries. A brochure PDF and a contact form lose to a specific page.

06 **First charters in smaller formats**

Cabin and day charter are the fastest-growing formats at roughly 9 to 11% forecast annual growth. They are how new clients try the category. Fleets that treat them as a funnel, not a nuisance, own the next decade's charterers.

Basis: IYC, YachtCharterFleet and Yacht.com trend reporting 2025-26; Northrop & Johnson Q2 2026; Mordor Intelligence segment forecasts. Trend items are market indicators, not measured shares.

Factors that could alter the outlook

DOWNSIDE RISKS

Sudden tax and fee changes

The Bahamas demonstrated single-season fleet flight. Any major charter state can repeat it. Watch Balearic anchoring rules, Greek licence enforcement and Caribbean fee regimes.

Suez transit security

The Red Sea season-extension model depends on insurable Suez transits. Regional security shifts would strand the strategy and its marketing.

Climate pressure on the core season

Mediterranean heat records and stronger hurricane seasons compress the comfortable weeks in both core regions and raise insurance costs at the margins.

Wealth-demand shock

Charter is discretionary spend by a narrow client base. An equity or geopolitical shock would hit the 24-40m bracket first, where competition is already hardest.

UPSIDE OPPORTUNITIES

Indonesian charter liberalisation

Any loosening of cabotage and licensing unlocks the most under-supplied high-interest cruising ground on earth, overnight.

Bahamas policy reversal

Authorities are reportedly reassessing the 2025 changes. A reversal plus proximity to Florida makes the Bahamas the fastest-recovering market of 2027.

The August 2027 eclipse

Totality crosses Southern Europe, North Africa and the Red Sea on 2 August 2027. A one-day event with a year of bookable anticipation, already moving high-latitude and Red Sea calendars.

Scarce new tonnage

With build slots gone to 2028-29, existing charter yachts face less new competition than at any point since 2020. Refit and repositioning stories carry further.

All items are YOT. interpretation of sourced developments. None is a forecast of probability; each is a watch item with a stated trigger.

Ten predictions for 2027.

These are interpretations, not measurements. We will score ourselves against them in the 2028 edition.

01 Athens holds the top pickup spot in brokerage-tracked booking data for the full 2027 season, not just the summer quarter.

02 The Med's share of brokerage-tracked charter starts edges below its 2026 summer level as Red Sea and Indian Ocean winters absorb repositioned tonnage.

03 The Bahamas begins visible recovery by winter 2027-28 following policy adjustment.

04 A Red Sea winter season becomes a standard option in large-yacht charter calendars, with published rates to match.

05 Expedition demand keeps outrunning ice-capable supply; polar weekly rates rise again for the 2027-28 Antarctic season.

06 Eclipse-week charters on 2 August 2027 command the year's highest single-week premiums outside St Barths New Year.

07 At least one major charter state announces a tax or licensing change that visibly moves fleet within the season.

08 Same-month and next-month bookings pass 40% of volume, making always-on search visibility the deciding marketing channel.

09 Cabin charter growth pulls a first wave of new-to-category clients into crewed weekly charter, measurable in entry-size demand.

10 Destination-specific content becomes the visible dividing line between charter businesses that grow in 2027 and those that hold.

Implications by seat

Yacht owners

Scarce new tonnage is rate support; use it. A well-marketed existing yacht faces less new competition through 2028 than at any recent point.

Ask your manager for the repositioning arithmetic: a Red Sea or Indian Ocean winter can turn dead months into revenue, and the infrastructure now exists.

Judge your marketing by enquiries per season, not by how the photography looks. Specific itinerary content outperforms beauty shots in every region we assessed.

Charter managers and brokerages

The collapsed booking window rewards whoever answers fastest with real availability. Late-notice inventory deserves its own always-on channel, not a seasonal push.

Build regional campaign assets for the corridor markets gaining traffic: Eastern Caribbean, East Med, Red Sea. Brokers forward good material; give them some.

Treat cabin and day charter as client acquisition with a ten-year value, and connect it to the crewed fleet deliberately.

Marinas, builders and suppliers

Fleet movement is your demand forecast. The corridors this report maps, Suez transits, Eastern Caribbean circulation, Asia-Pacific growth, are where transient business lands next.

Regions scoring high on growth and low on infrastructure, Southeast Asia above all, are where capacity investment meets the least competition.

Content works for B2B too: the marina that publishes honest passage and berthing guidance becomes the one captains route by.

The interactive charter map

The online companion to this report: a world map rendered from real geodata, where each of the twelve regions is a selectable layer carrying its scorecard, season bar, indicative rates and sourced signals. No decorative heatmaps; every visual element traces to a register entry.

Three views. Season: scrub a month slider and watch the world's active charter grounds light and dim, making the counter-seasonal argument instantly. Signals: each region shaded by demand-signal score with its evidence one tap away. Movement: documented repositioning corridors, Suez transits, Caribbean circulation, drawn as routes with their sources attached.

Every region panel ends with the same two elements: the marketing implication from this report, and an enquiry point. The map is a prospecting asset as much as an editorial one; each view is shareable at a stable URL for outbound use.

Build note: region geometry from public geodata; scores and copy from this report's dataset, so the map updates when the register does.

PANEL ANATOMY · PER REGION

- A Region name, maturity class, season bar
- B Five-indicator scorecard with rubric link
- C Indicative rates with publication dates
- D Sourced signals, newest first
- E Marketing implication
- ● Enquiry point, the page's single accent

A working prototype can follow this report as a standalone build.

Sources and verification register

PRIMARY SOURCES CITED

Northrop & Johnson Q2 2026 Superyacht Market Report (Jul 2026). Charter starts, pickup locations and booking windows within N&J's own booking base; Q2 only, no published year-earlier comparison, figures subject to upward revision. Not a measure of the whole market.

IYC Mid-year 2026 charter report (Jul 2026). Winter 2025/26 bookings +10% YoY, Caribbean ~45% of winter activity; summer shares East Med 45%, West Med 39%, Greece 28%, Croatia 13%; South Pacific +50% and Indian Ocean +40% YoY. IYC's tracked bookings only.

BOAT International Global Order Book 2026 (Dec 2025). Yachts 24m+ on order before 1 Sep 2025; via Monaco Yacht Show and Marine Industry News (Jul-Aug 2026).

Market-size estimates Mordor Intelligence, Precedence Research, TBRC/Research & Markets, Future Market Insights (2026). Scopes differ; quoted as a range on p07.

VAT and licensing Greek Laws 5073/2023 and 4926/2022 via georgeyachts.com (Jun 2026) and yachtchartermarket.com; IYC Charter Taxes & VAT (2026) for Croatia and Montenegro.

Bahamas The Triton (Dec 2025), yacht.com (Jan 2026), YachtCharterFleet (Jan 2026), Port Zante (Feb 2026). Show cancellation confirmed; arrivals figure is industry reporting.

Red Sea and Gulf Megayacht News (Dec 2025), IYC (2026), Fraser (2026), Knight Frank Wealth Report 2026 via Elite Traveler (Apr 2026), ouryachtworld (Jun 2026).

Asia-Pacific fleet APSA figures via Lumenautica (Jan 2026). Trend reporting: superyachts.com, boatbookings.com.

Expedition YachtCharterFleet (Dec 2025), MarketIntelo (Jun 2026), yachtsmen.com ARCTIC listing (Jul 2026), Frontier Yachting (Aug 2026), thetraveler.org occupancy proxy (Jun 2026).

REQUIRES HUMAN VERIFICATION BEFORE EXTERNAL USE

Bahamas arrivals down ~40%: trace to official Bahamian statistics; currently industry reporting only.

Fort Lauderdale 35-40% brokerage share and FLIBS 25-30% booking uplift: single source (Lumenautica), methodology unstated.

Global fleet counts (~6,000 vessels 24m+, ~1,500 active charter): single source (Mare Forum), thresholds differ from other counts.

East Med search-trend magnitudes: YachtCharterFleet headline (Jul 2026); underlying numbers not yet reviewed. N&J and IYC shares: sample sizes undisclosed; both are single-brokerage bases, not global coverage.

Expedition market USD 3.2bn: niche research-firm estimate, treat as indicative.

All 2027 statements are projections; no 2027 booking data exists anywhere.

METHOD NOTE

Compiled September 2026 from sources published 2024-2026, cross-checked where more than one credible source existed. Full register with URLs, dates and limitations maintained alongside this report and available on request. Nothing in this document is drawn from private booking systems.

Fill the calendar before the season starts.

YOT. builds the websites, films and campaigns that fill charter calendars. If this report changed where your vessel or business should be visible in 2027, that is a conversation worth having now.

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