

The background of the slide is a scenic photograph of a rugged Hawaiian coastline. Dark, jagged volcanic mountains rise steeply from the sea. The water is a vibrant blue, with white waves crashing against a dark, pebbly shore. A small patch of sandy beach is visible in the lower right corner. The sky is bright with some light clouds.

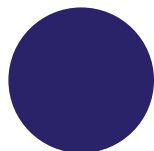
2023 Hawai'i Cruise Update

Shannon McKee
President, Access Cruise



Benefits of Cruise in Hawai'i

Cruise Lines traditionally book their itineraries 1 to 3 years in advance allowing Hawai'i to evaluate and manage the cruise capacity well in advance of FIT arrivals.



Sampling

Many cruisers are first-timers to Hawai'i. Cruise provides an introduction to Hawai'i through sampling



Sustainability

There is natural sustainability built into cruise through the existing infrastructure



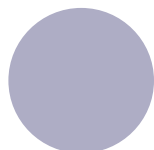
Promotion & Ambassadors

Cruise lines promote Hawai'i and are excellent ambassadors



Small Footprint

Traditionally 30-80% of cruise guests take an organized ship tour. Others will arrange for private tours



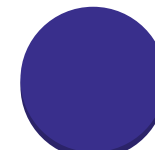
Primarily Shoulder Season

The high season for the cruise industry in Hawai'i is during spring and fall when tourism is traditionally lower



Education

Cruise lines help educate their guests on the Hawaiian culture and hire locals for onboard programming



Supports Local Community

Cruise lines support entrepreneurship and hiring local talent from Hawai'i to provide services



Distribution

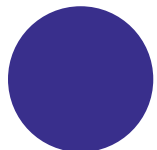
Cruise lines distribute guests among the major Hawaiian Islands



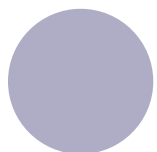
State of the Cruise Industry



In 2023 the full deployment of the cruise fleet is expected although some regions may still be impacted (Asia just returning)



Good news is that cruise companies have been reporting higher booking volumes than historical averages and at higher prices in 2023



As of September 2023, there are 90+ brands operating 447 ships. Passenger capacity is estimated to be 31.16 million in 2023, up from 29.7 in 2022



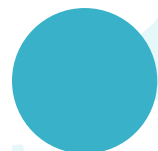
The largest source market is the US with the largest sailing region being the Caribbean (38%) followed by the Mediterranean (17.5%) and Northern Europe (10%)



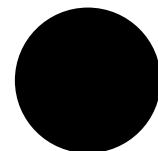
19 new vessels will be delivered in 2023. 68 new cruise ships are on order for deliveries through 2028



Cruise fleets are newer and offer more features that help drive onboard earnings which play a much larger role in today's business model



Cruising has continued to evolve and there seems to be a ship for every demographic, preference, interest and budget today



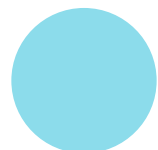
Cruise companies are working diligently to pay down the debt incurred during pandemic as they resume profitability



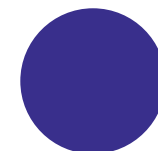
Cruise operators are more focused on cost reductions including itinerary adjustments to minimize fuel consumption and reductions in onboard staffing and services



Onboard technology has evolved making the modern cruise fleets more sustainable and greener by reducing fuel consumption and air & water emissions and also introducing new fuels



Exciting News! MSC Cruises conducted the first zero net emissions cruise in Europe on the MSC Euribia



Positive forecast. Strong market demand combined with product evolution, environmental targets and technology development are setting the course for a bright future for the cruise industry



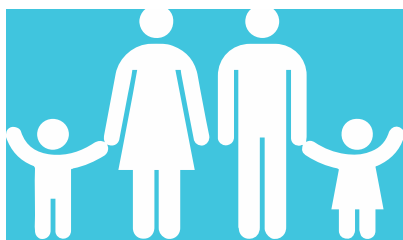
2023 Cruise Industry Stats



447 Ships



**90+ Cruise Brands
Sailing to date**



680,573 Cruise Berths

(Anticipated in 2023)

31.16 million passengers

(maximum capacity)

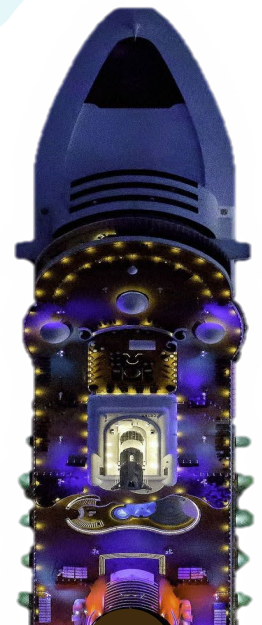
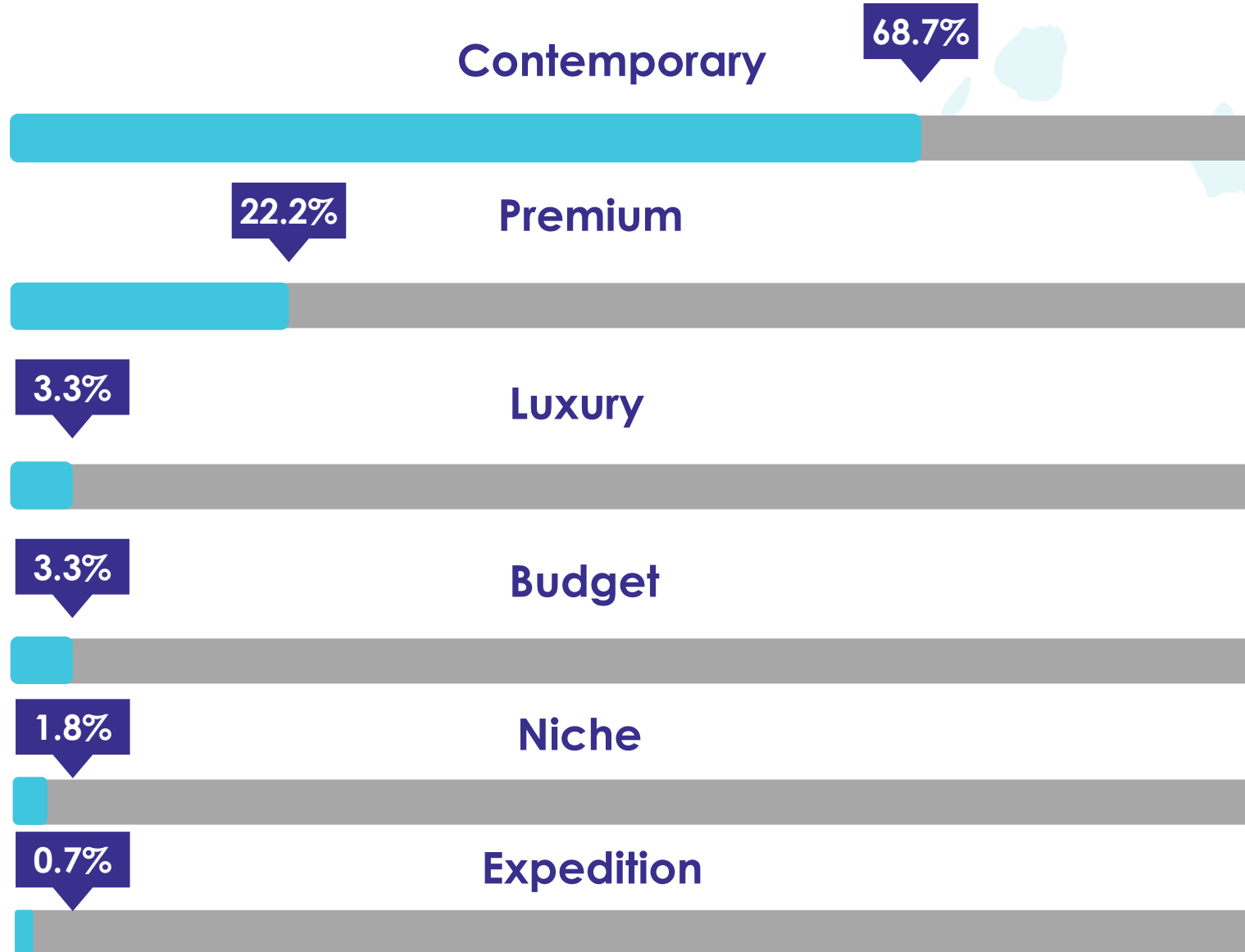


68 new vessels

- 19 Vessels in 2023
- 10 Small / Expedition Vessels
- 37 Using Alternative Fuel Sources



Market Segment 2023





Major Cruise Conglomerates



CARNIVAL CORPORATION
97 ships, 39.1% Market

- Carnival - 26
- Costa - 10
- Princess - 15
- AIDA - 12
- Holland America - 11
- P&O - 7
- P&O Australia - 3
- Cunard Line - 3
- Seabourn - 7
- Carnival/China - 3



ROYAL CARIBBEAN GROUP
65 ships, 24.0% Market

- Royal Caribbean - 26
- Celebrity - 16
- TUI - 6
- Hapag Loyd - 5
- Silversea - 12



MSC CRUISES
23 Ships, 12.4% Market

- MSC - 22
- Explora Journeys - 1



NORWEGIAN CRUISE LINE Holdings
32 Ships, 8.5% Market

- Norwegian - 19
- Oceania - 7
- Regent - 6



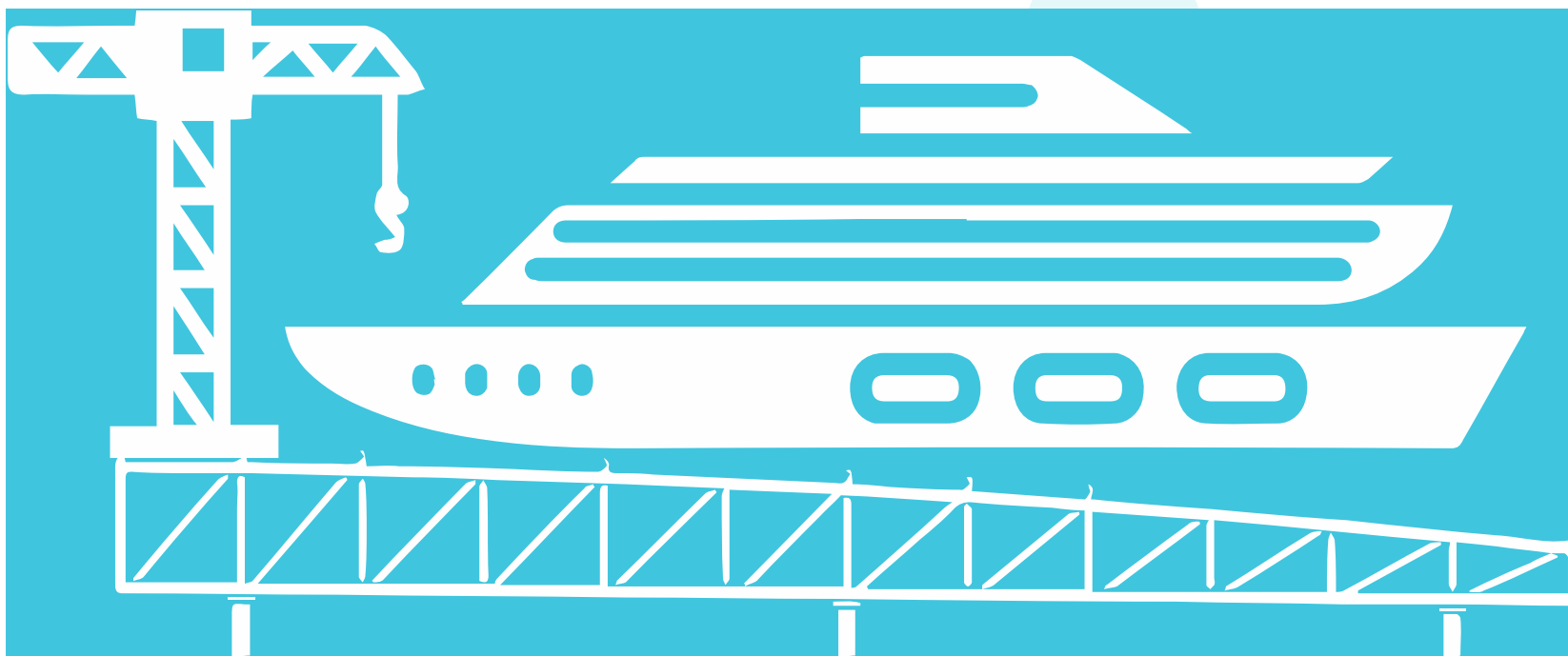
84% of world fleet is the Top 4 Cruise Conglomerates
217 ships
26.14 million passenger capacity



Cruise Ship New Builds

- ⦿ 19 Ships in 2023
- ⦿ 10 Ships for 2024
- ⦿ 19 Ships for 2025
- ⦿ 9 Ships for 2026
- ⦿ 7 Ships for 2027
- ⦿ 4 Ships for 2028

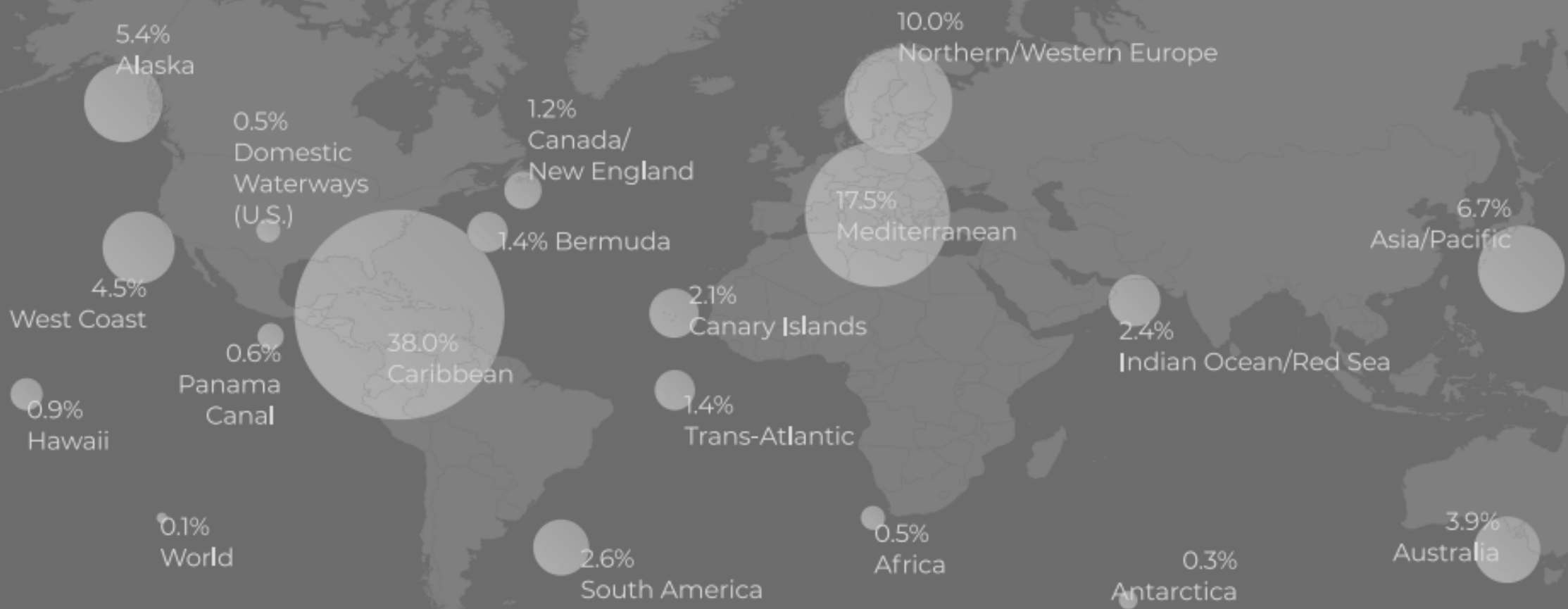
Total 68 Ships





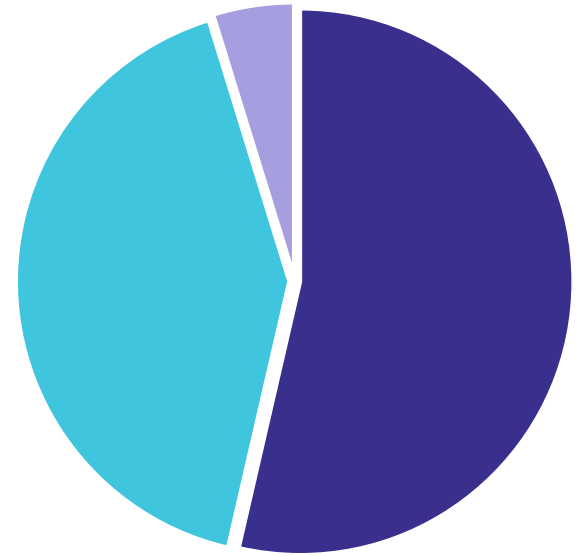
Sailing Regions

SAILING REGIONS

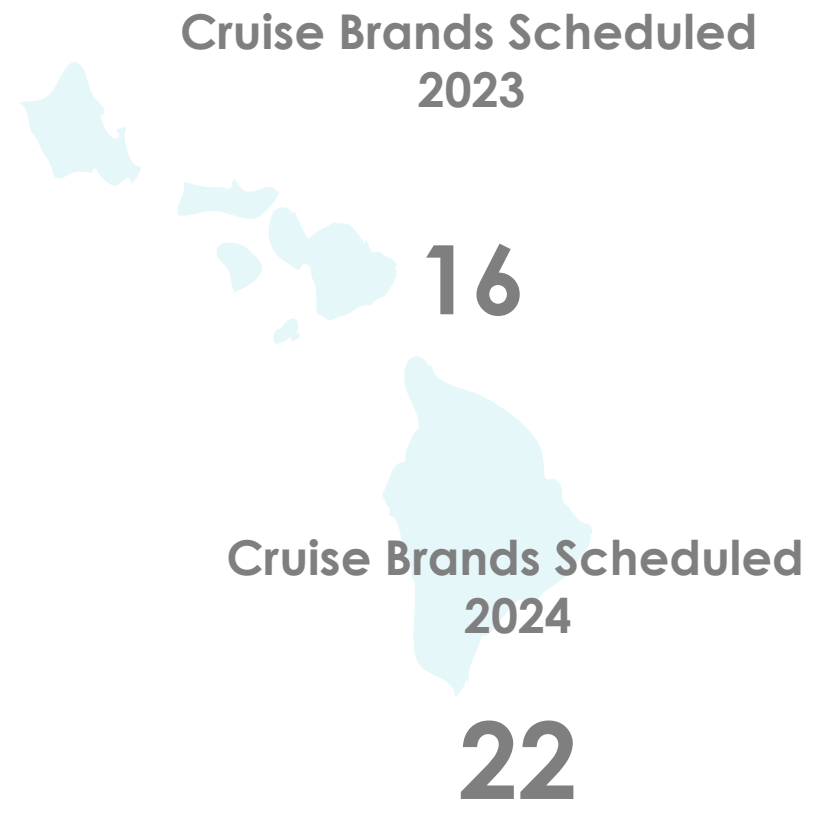
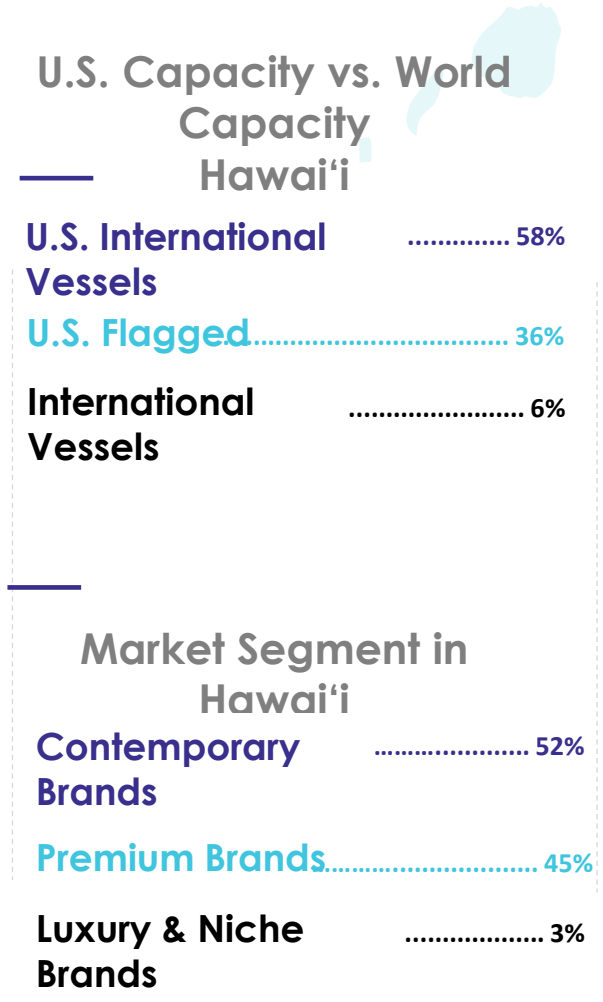




Source of Cruise Brands to Hawai'i



94% of the cruise brands visiting Hawai'i are from North America





2023 Cruise Markets

NCLA
38.6 % Cruise Capacity
Considered Contemporary

NCLA's *Pride of America* supplies 36% of all cruise capacity to the Hawaiian Islands

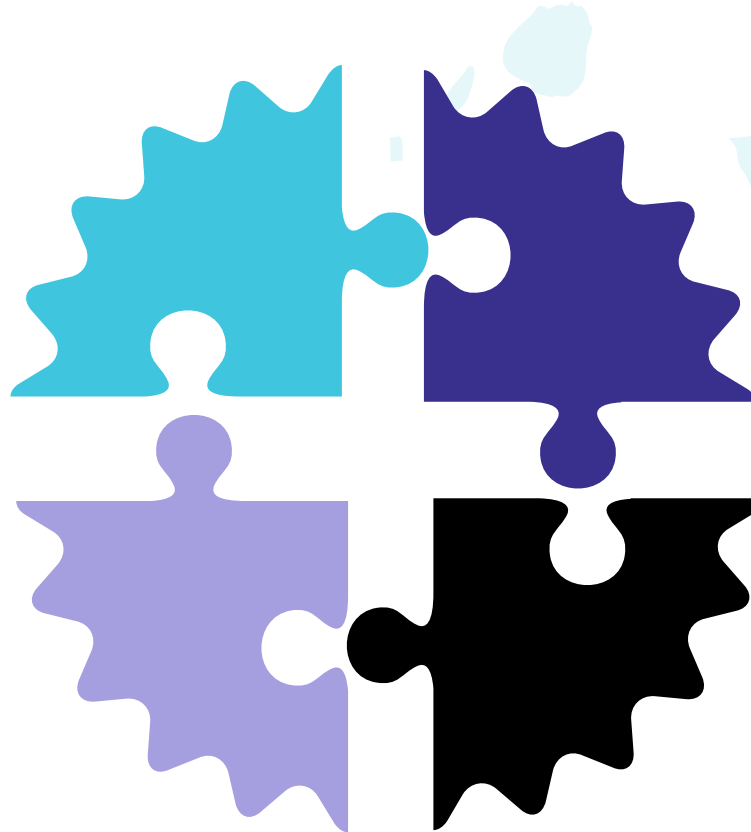
Down 4% from 40% in 2022

Contemporary Brands
16 % Cruise Capacity
52% if you include NCL

The contemporary brands have the largest vessels at sea. These brands all frequent the Hawaiian Islands and Access Cruise supports these brands for marketing and logistical needs. Messaging has been that there is a limit to the size of vessel Hawai'i will be able to accommodate for the future due to infrastructure

Includes Royal Caribbean, Carnival Cruise Line & MSC Cruises

Total contemporary brand capacity down 3% from 55% in 2022



The cruise industry for Hawai'i is broken into 4 key markets. Our focus has been to increase quality visitations by growing the Premium & Luxury market segments.

Luxury & Specialty
3% Cruise Capacity

The luxury and specialty brands are a small piece of cruising in Hawai'i. Vessels are small and guests pay premium prices. Tour penetration is high and special events are frequent

Down 1 % from 2022

Premium Brands
45% Cruise Capacity

We continue to foster relations with the premium brands which can be accommodated within the current port infrastructure and have a higher passenger spend. Premium brands are traditionally mid-sized ships with repetitive itineraries. Princess has recently expanded her deployment to include summer sailings

Up 4 % from 41.5% in 2022
Up 8% from 2019



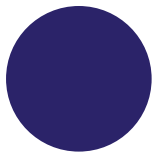
2023 vs. 2024 Cruise Brands - Honolulu

2023 Cruise Lines	Est. PAX 100%
Carnival Cruise Line	9,450
Carnival Plc	2,388
Celebrity Cruises Inc	5,673
Cunard Line Ltd	2,250
Fred Olsen Windcarrier AS	1,825
Holland America Line NV	29,621
Integrated Cruise Mgmt Pte Ltd	6,816
Magical Cruise Co Ltd	2,400
MSC Crociere SpA	6,026
NCL Bahamas Ltd	132,795
Oceania Cruises S de RL	824
PONANT	460
Princess Cruise Lines Ltd	108,767
Royal Caribbean Cruises Ltd	27,021
Seabourn Cruise Line Ltd	1,386
Viking Ocean Cruises Ltd	2,842
Total	340,544

2024 Cruise Lines	Est. PAX 100%
Carnival Cruise Line	27,453
Carnival Plc	2,388
Celebrity Cruises Inc	11,720
Cunard Line Ltd	4,500
Crystal Cruises LLC	450
Fred Olsen Windcarrier AS	1,825
Holland America Line NV	33,219
Integrated Cruise Mgmt Pte Ltd	4,544
MSC Crociere SpA	3,605
NCL Bahamas Ltd	142,973
NYK Cruises Co Ltd	600
Oceania Cruises S de RL	2,548
Phoenix Reisen GmbH	1,200
PONANT	230
Princess Cruise Lines Ltd	83,985
Regent Seven Seas Cruises Inc	730
The World	1,188
Royal Caribbean Cruises Ltd	32,021
Seabourn Cruise Line Ltd	462
Silversea Cruises Ltd	388
TUI Cruises GmbH	544
Viking Ocean Cruises Ltd	4,730
Total	361,303

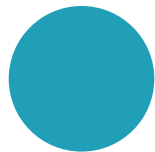


New & Returning Brands to Hawai'i



Cunard / P & O

Both English brands returning with the Queen Victoria, Queen Elizabeth & Arcadia
Premium & Contemporary



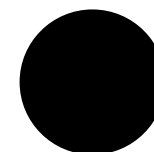
Fred Olsen

English brand with mid-size ships returning with the Borealis
Premium



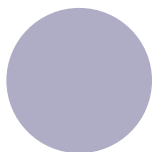
Viking Cruises

U.S. clientele with ships of 1,000 guests
Luxury



MSC

Italian brand with international clientele with large vessels.
Contemporary



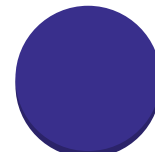
Phoenix Reisen

German brand returning with a small vessel of only 1,200
Contemporary



Ponant

French luxury brand returning with small Le Boreal of 230 guests
Luxury



Hapag Lloyd

German premium/luxury brand returning with the Europa of 544 German speaking guests
Premium/Luxury



Silversea Cruises

U.S. clientele with small luxury ships returning with Silver Shadow with 388 guests
Luxury



Hawai'i Cruise YTD (Jan. – August 2023)

Month	Visitor Arrivals	Vessel Arrivals	Total Spend	Visitor Arrivals by Air	Visitor Arrivals by Air	Total Cruise Visitors
	International Vessels	International Cruise Ships	International Vessels (Million)	Pride of America	International Vessels	International and Pride of America
Jan-23	16,648	8	\$ 6.8	8,962	-	25,610
Feb-23	20,110	9	\$ 9.2	9,563	-	29,673
Mar-23	8,561	3	\$ 3.6	9,826	-	18,387
Apr-23	21,328	12	\$ 9.5	12,228	1,852	35,407
May-23	11,075	4	\$ 6.1	10,132	-	21,206
Jun-23	3,236	1	\$ 1.4	10,152	-	13,388
Jul-23	3,327	1	\$ 1.5	13,007	-	16,334
Aug-23	3,140	1	\$ 1.4	9,988	-	13,128
Total 2023	87,425	39	\$ 39.5	83,856	1,852	173,133

- Does not include crew spend
- Does not include ship services spend: Security, Stevedoring, Fueling, etc.
- Note: In April 2023
 - 12,228 Visitors flew to Hawai'i to board the Pride of America
 - 1,852 Visitors flew to Hawai'i to board Norwegian Spirit



Hawai'i Cruise Updates

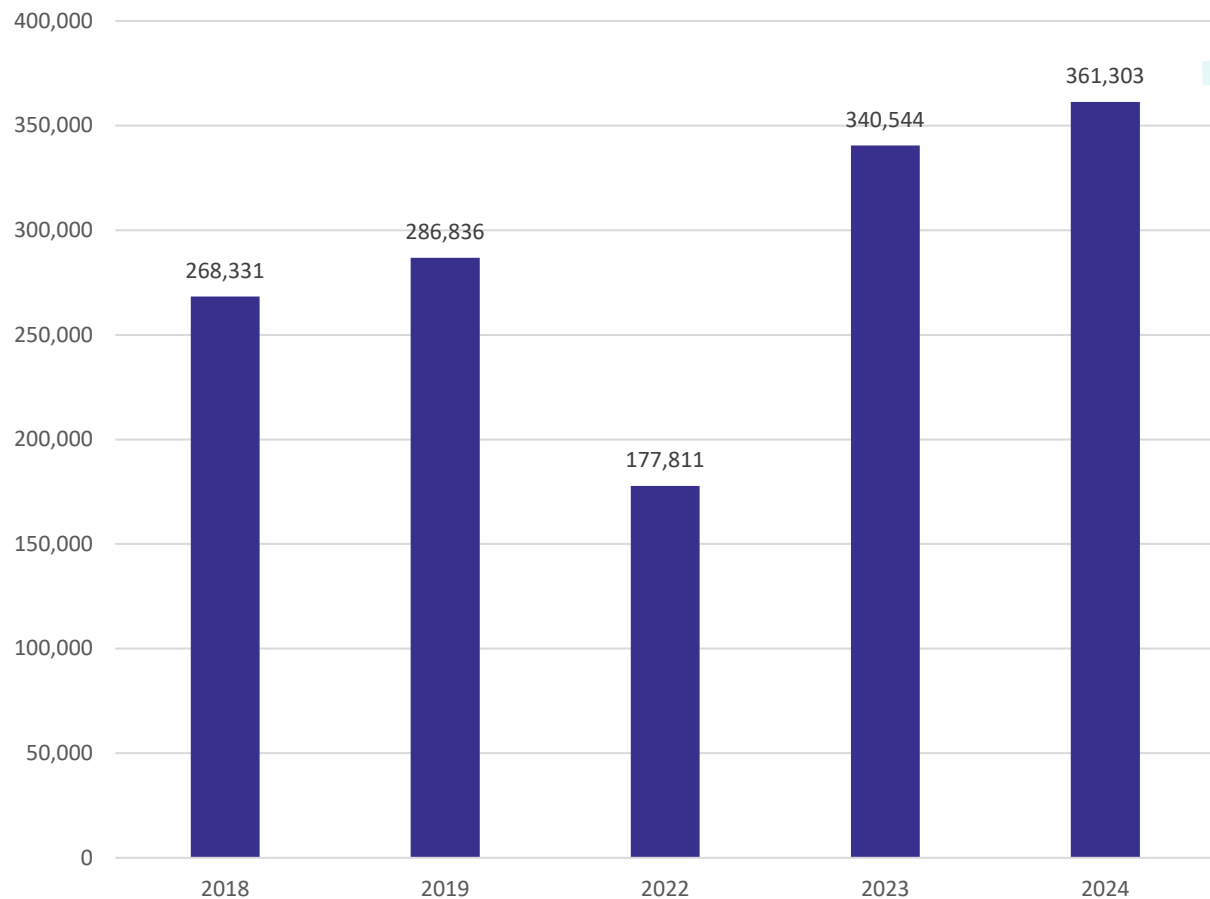
Port	2018	2019	2022	2023	2024
Hilo	220,153	252,986	137,378	262,504	289,203
Honolulu	268,331	286,836	177,811	340,544	361,303
Kona	138,246	176,596	104,549	233,340	249,308
Kahului	127,680	151,724	129,738	166,274	233,103
Lahaina	141,809	115,420	29,956	81,018	16,054
Kauai	211,419	223,387	133,030	243,067	263,509
Maui Total	269,489	267,144	159,694	247,292	249,157

▪ Note:

- Data collected from Hawai'i.PortCall.com
- Data is estimated based on Hawai'i.PortCall.com
- 2022 forecast data calculated at 60% of ship capacity



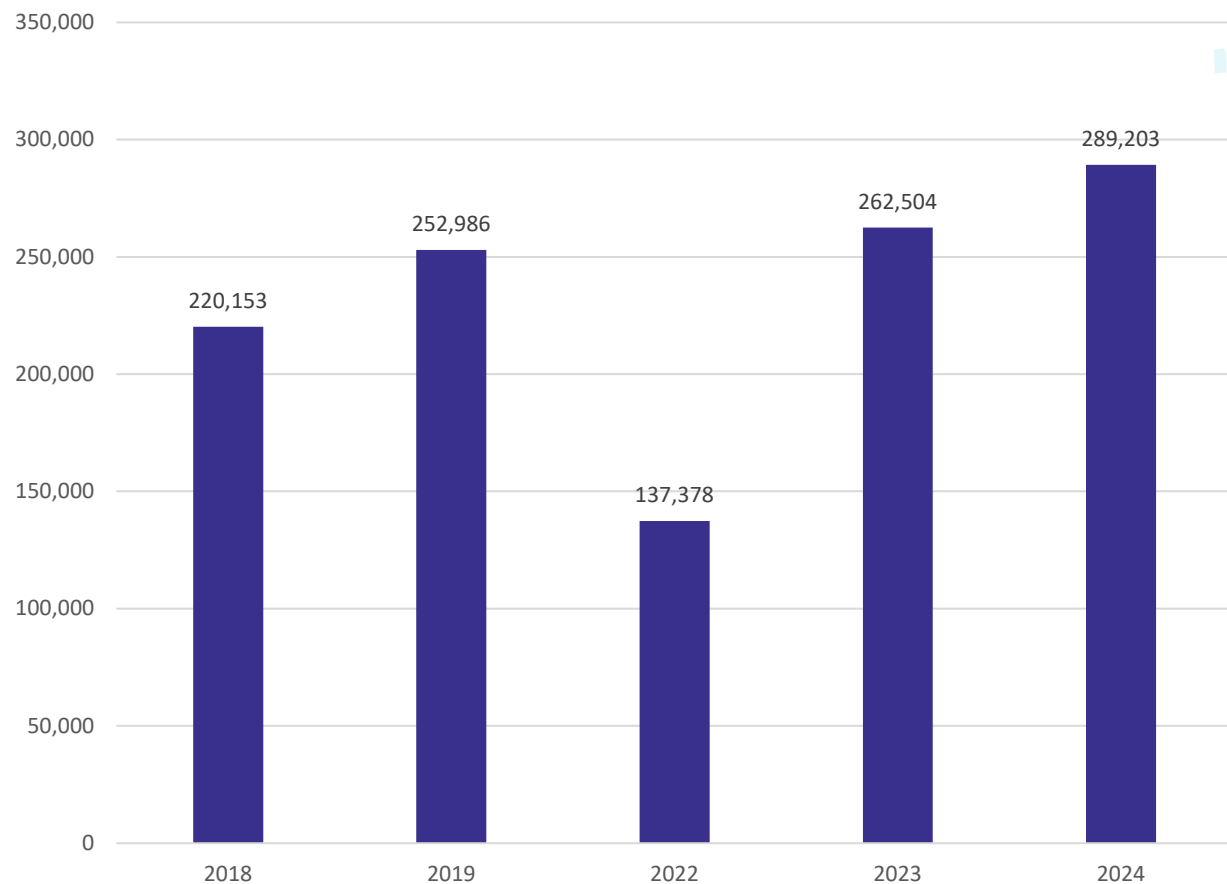
Honolulu Cruise Passengers & Port Calls



Month	2018	2019	2022	2023	2024
	# of Calls	# of Calls	# of Calls	# of Calls	# of Calls
January	12	12	8	12	18
February	11	12	4	14	16
March	13	10	5	7	10
April	14	14	12	17	22
May	9	8	8	8	9
June	7	6	5	5	6
July	5	4	5	7	5
August	4	5	4	5	5
September	11	9	7	7	11
October	7	15	23	26	21
November	10	14	9	10	13
December	15	12	10	13	12
Total Calls	118	121	100	131	148



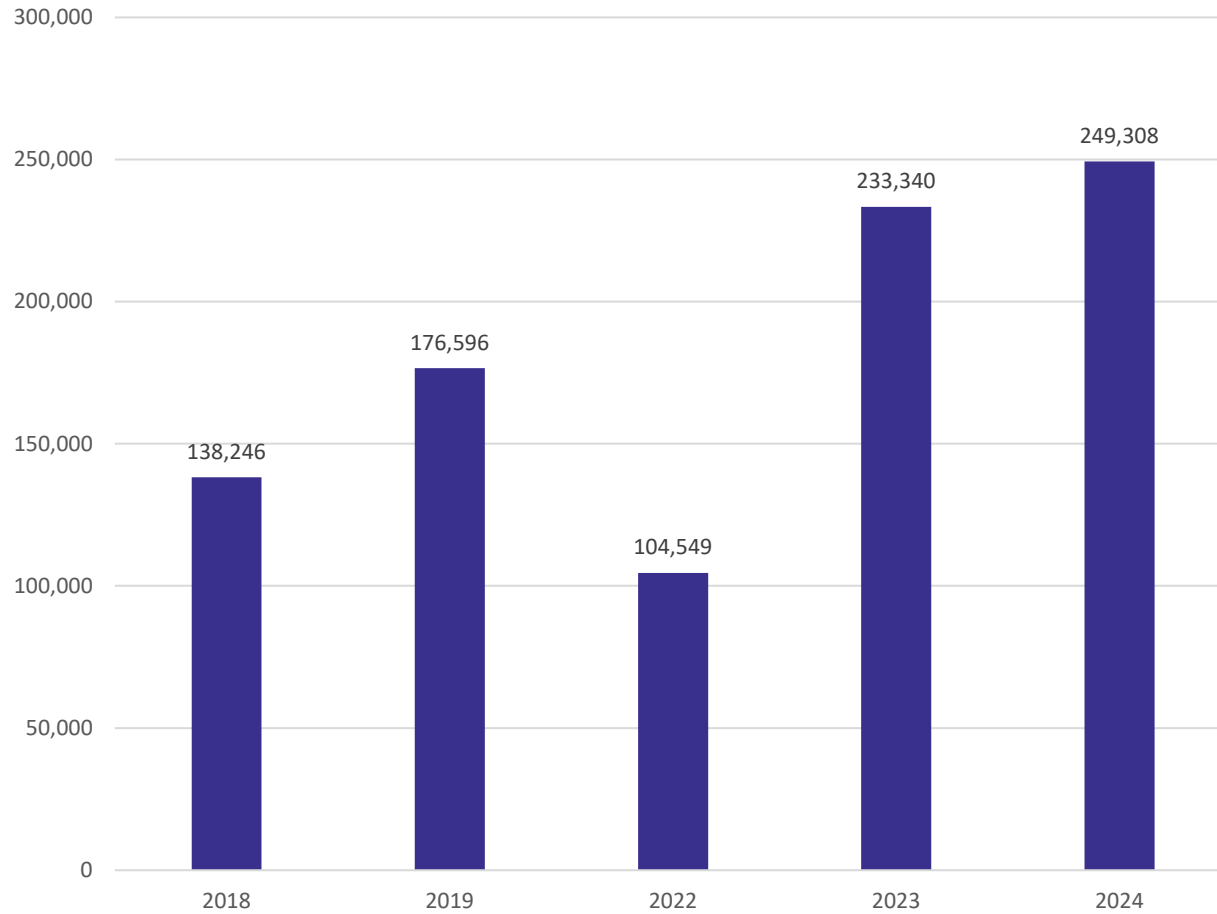
Hilo Cruise Passengers & Port Calls



Month	2018	2019	2022	2023	2024
	# of Calls	# of Calls	# of Calls	# of Calls	# of Calls
January	11	9	6	9	15
February	10	8	3	9	12
March	11	11	2	6	7
April	10	14	8	11	18
May	2	7	9	9	8
June	3	6	6	5	6
July	6	5	4	4	5
August	4	4	5	5	4
September	7	10	7	8	8
October	12	15	19	17	16
November	10	13	11	11	10
December	10	10	7	12	12
Total Calls	96	112	87	106	121



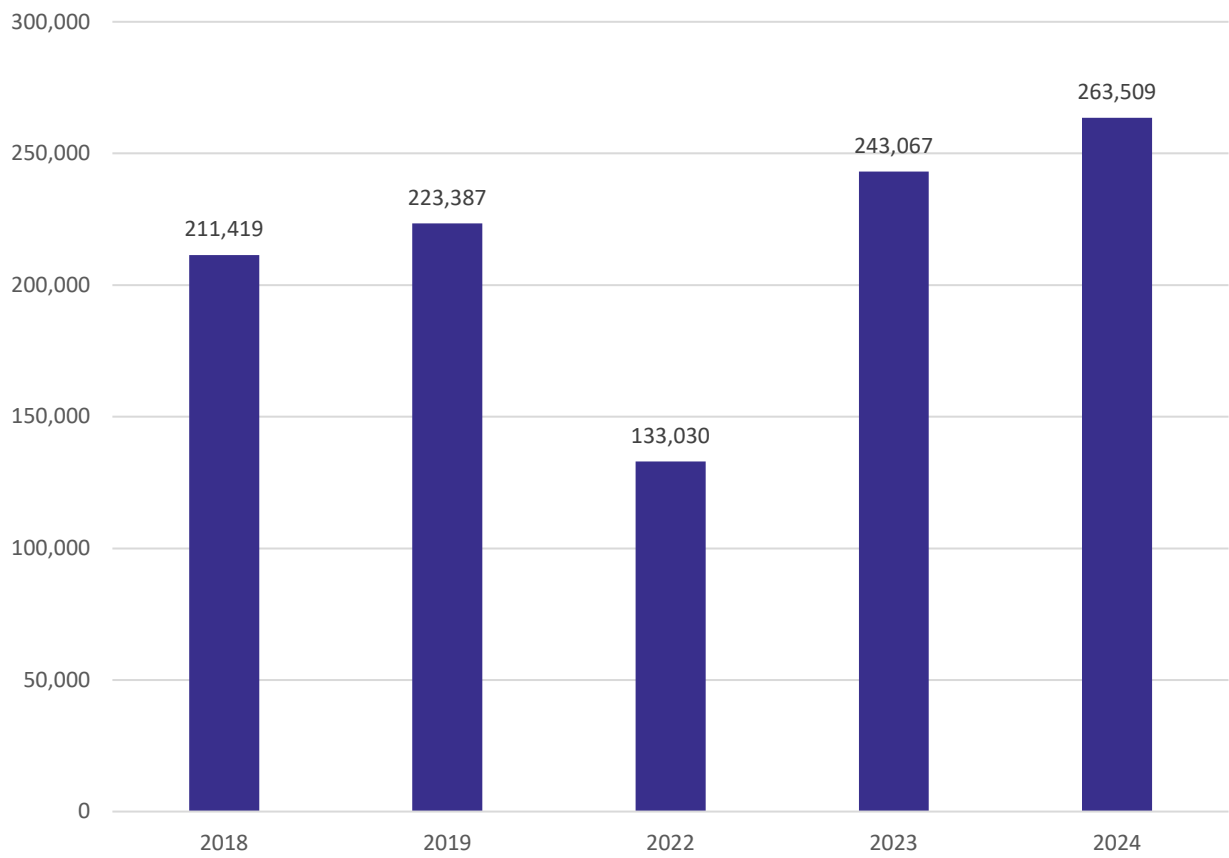
Kailua-Kona Cruise Passengers & Port Calls



Month	2018	2019	2022	2023	2024
	# of Calls	# of Calls	# of Calls	# of Calls	# of Calls
January	5	5	3	6	11
February	4	4	2	7	9
March	5	5	1	6	7
April	6	8	4	10	14
May	6	7	7	9	9
June	3	4	4	4	4
July	5	5	4	4	5
August	5	4	5	5	4
September	7	8	8	5	9
October	8	11	9	15	9
November	5	7	7	6	9
December	7	7	7	11	9
Total Calls	66	75	61	88	99



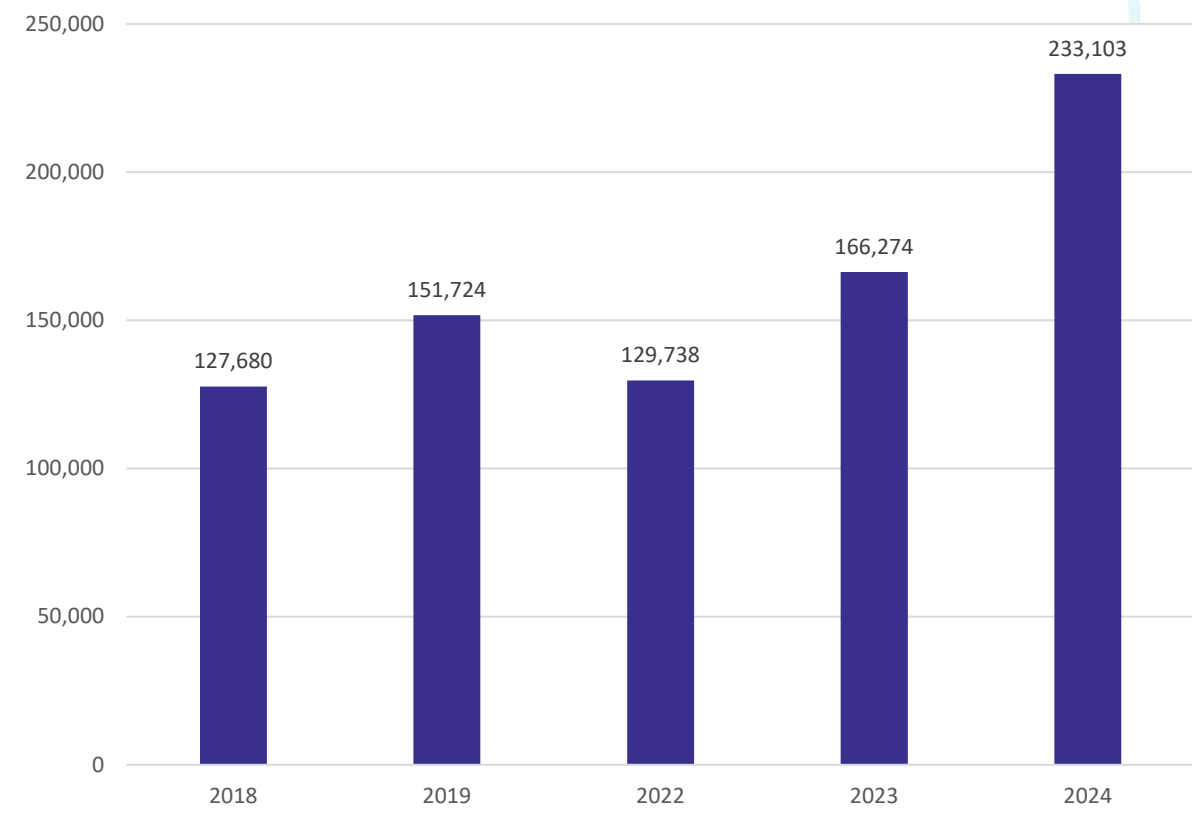
Kaua'i Cruise Passengers & Port Calls



Month	2018	2019	2022	2023	2024
	# of Calls	# of Calls	# of Calls	# of Calls	# of Calls
January	9	8	4	8	15
February	6	7	3	9	12
March	11	8	1	5	6
April	11	11	7	9	17
May	7	7	8	7	6
June	5	5	7	6	6
July	4	4	4	5	4
August	5	5	4	6	5
September	7	7	5	6	7
October	10	9	18	18	17
November	9	10	9	12	8
December	8	9	7	9	9
Total Calls	92	90	77	100	112



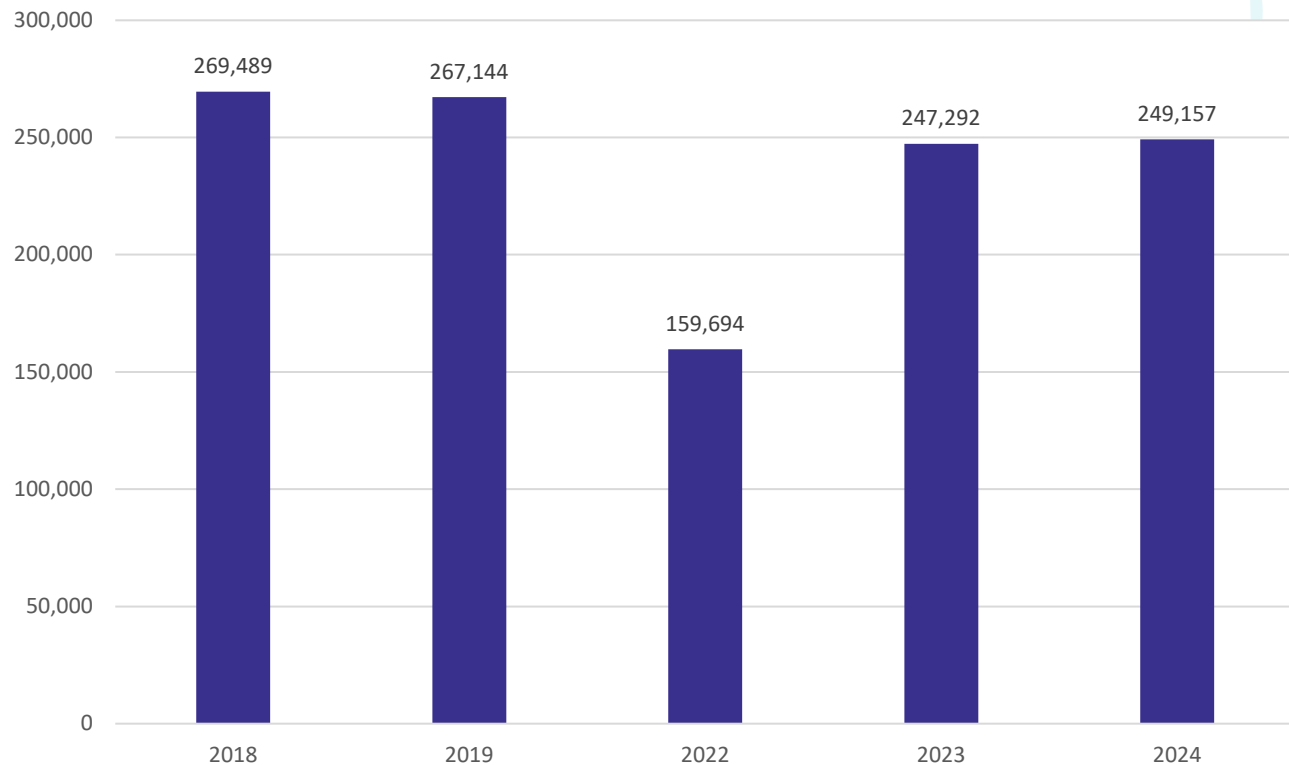
Kahului Cruise Passengers & Port Calls



Month	2018	2019	2022	2023	2024
	# of Calls	# of Calls	# of Calls	# of Calls	# of Calls
January	4	6	6	6	11
February	5	3	4	8	11
March	7	5	2	4	5
April	6	5	6	7	9
May	4	5	8	5	6
June	4	5	6	4	7
July	5	4	5	5	4
August	4	4	4	1	4
September	7	5	6	7	7
October	6	9	12	11	16
November	5	6	8	10	11
December	6	8	7	8	10
Total Calls	63	65	74	76	101



Mauai Cruise Passengers & Port Calls – Current



Month	2018	2019	2022	2023	2024
	# of Calls	# of Calls	# of Calls	# of Calls	# of Calls
January	11	10	8	10	11
February	7	7	4	9	11
March	12	7	2	7	5
April	13	13	6	14	10
May	11	8	10	10	9
June	6	6	6	5	7
July	6	4	5	6	4
August	4	4	4	1	4
September	10	8	7	7	7
October	13	15	21	11	19
November	10	13	9	10	11
December	12	12	9	8	10
Total Calls	115	107	91	98	108



MauI Cruise Calls - Cancellations

Date	Vessel	Action	Guests	Reason
30-Sep	Celebrity Solstice	CancelLahaina	2660 Guests	No space available in Kahlului. Conflict with Norwegian Spirit
3-Oct	Brilliance of the Seas	CancelLahaina	2496 Guests	Too Large for Kahului
4-Oct	Royal Princess	CancelLahaina	4250 Guests	Barge in Kahului
5-Oct	Coral Princess	Shifts to Kahului	2265 Guests	Kahului Available
7-Oct	Grand Princess	CancelLahaina	3006 Guests	No space available in Kahlului. Conflict with Norwegian Spirit
8-Oct	Quantum of the Seas	CancelLahaina	4905 Guests	Too large for Kahului
9-Oct	Crown Princess	CancelLahaina	3582 Guests	No space available in Kahlului. Conflict with Pride of America
12-Oct	Ovation of the Seas	CancelLahaina	4905 Guests	Too large for Kahului
14-Oct	Majestic Princess	CancelLahaina	4450 Guests	Too Large for Kahului
15-Oct	Noordam	CancelLahaina	2596 Guests	No space available in Kahlului. Conflict with Pride of America
17-Oct	Koningsdam	CancelLahaina	3152 Guests	Barge in Kahului
22-Oct	Grand Princess	CancelLahaina	3006 Guests	No space available in Kahlului. Conflict with Pride of America
23-Oct	Sapphire Princess	CancelLahaina	2988 Guests	No space available in Kahlului. Conflict with Pride of America
30-Oct	Seabourn Odyssey	CancelLahaina	462 Guests	No space available in Kahlului. Conflict with Pride of America
13-Nov	Crown Princess	CancelLahaina	3582 Guests	No space available in Kahlului. Conflict with Pride of America
4-Dec	Crown Princess	CancelLahaina	3582 Guests	No space available in Kahlului. Conflict with Pride of America
9-Dec	Discovery Princess	CancelLahaina	3660 Guests	Too Large for Kahului
29-Dec	Crown Princess	CancelLahaina	3582 Guests	Barge in Kahului



Initiatives to Strengthen Cruise Partnerships



Tradeshow & Events

Seatrade Cruise Global took place in Fort Lauderdale in April 2023 and was a great success to continue relationship building with each of the cruise brands



America Cruise Line

American Cruise Line is a small family-owned and U.S. flagged cruise line. ACL places emphasis on small vessel cruising allowing them to know their guests and the importance of their onboard programming. Educating guests on the history and culture of the destinations is a key component to their success



Annual Fam Trip

Fam trips are an ideal way to build and strengthen relationships with the premium and luxury brands. This year's fam will be with American Cruise Line in December 2023



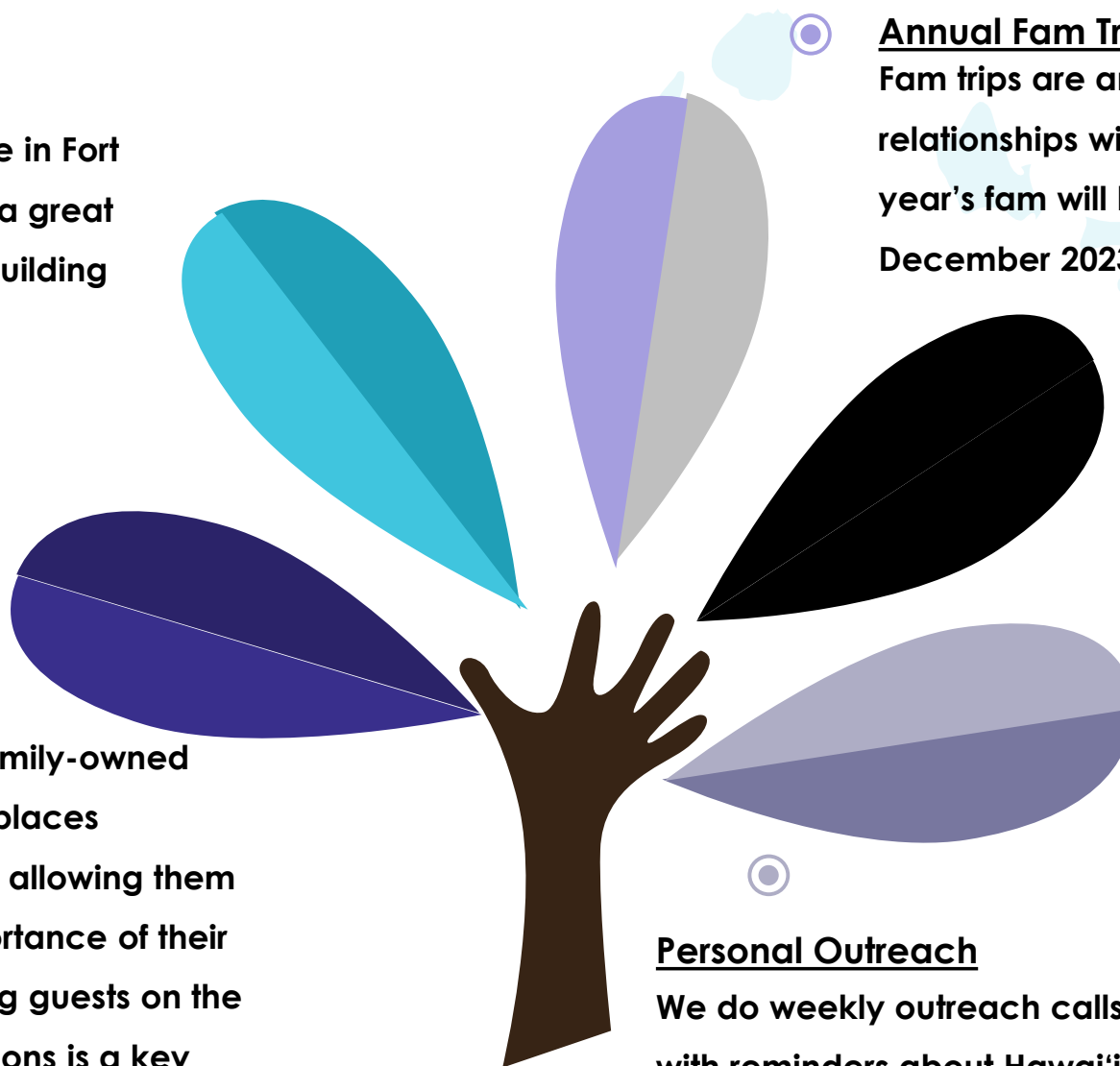
Mālama Programs

There has been an emphasis placed on the importance of Mālama programs. Carnival Corporation visited Hawai'i in March to review how they could become better community partners



Personal Outreach

We do weekly outreach calls to different individuals with reminders about Hawai'i





Mālama Hawai'i

Avenues to pursue Mālama Hawai'i programs

- Water refill stations
- Elimination of harmful sunscreen
- Onboard community events
- Luxury brands want branded experiences

- Incorporation of Mālama programs into specific tour products
 - MC & A
 - PolyAd
 - Hawai'i Tour Consultants

- Educational Programs
- Pier Programs
- Community involvement

- U.S.S. Missouri
- Fishpond
- Maui Ocean Center
- Beach Clean Up

- Modify standardized programs to fit cruise guest profile
 - Maui Ocean Center
 - U.S.S. Missouri

Cruise Brands

Tour Operators

Passengers

Crew

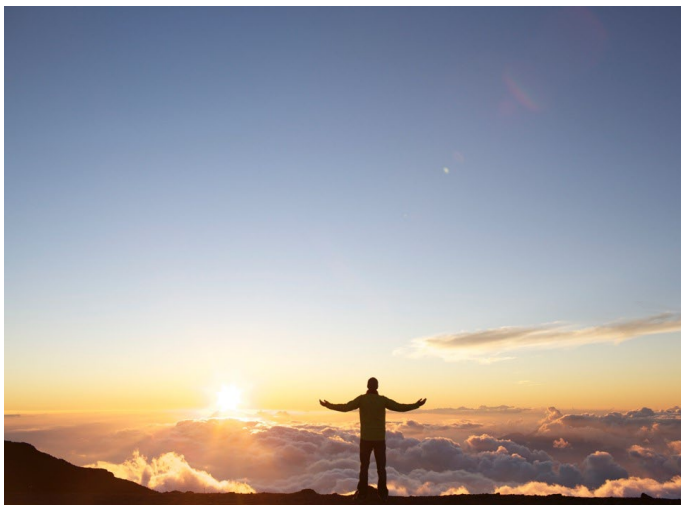
Local Attractions

There are countless ways to accomplish implementing Mālama Hawai'i programs with the cruise industry. It is a matter of collaborating between the cruise brands, tour operators and local community to bring new programs to life. We have worked with Explora Journeys to brand their own experience.



Mālama Maui

- Donations
 - Norwegian Cruise Line
 - Disney Cruise Line – Match Program
- Immediate Return to Maui
- Community Programs – Under Development
 - Creating hands-on giveback programs with multiple cruise lines
 - Cruise lines have vast onboard talents that can contribute to community programs





Mahalo!

