



Cruise Fact Sheet

Cruise Overview

Cruise ships have played a vital role in Hawaii's tourism industry for nearly 150 years. The Hawai'i Tourism Authority (HTA) selected Access Cruise, Inc. to provide cruise consultation services and assist the HTA in its objective of developing and maintaining cruise calls as well as nurturing relationships for long-term collaborative partnerships that allow the cruise brands to align and educate guests based on HTA's initiatives. The cruise industry provides valuable economic benefits to many local providers of all sizes within the Hawaiian Islands.

Year-to-date November 2023 Quick Facts

Spending by visitors who came by out-of-state cruise ships ¹ :	\$62.9 million
Arrivals by out-of-state cruise ships:	140,831 visitors
Number of ship arrivals from out-of-state:	66 cruise ships
Average length of stay:	4.78 days
First time visitors:	30.4%
Repeat visitors:	69.6%

From visitors who came via out-of-state cruise ships	2019	2020	2021	2022	YTD Nov. 2023P	YTD Nov. 2022	% Change
Visitor Expenditures (\$ Millions)	58.4	NA	NA	45.5	62.9	39.9	57.6%
Visitor Days	668,524	NA	NA	503,605	673,640	433,859	55.3%
Arrivals	143,508	NA	NA	95,309	140,831	81,691	72.4%
Average Daily Census	1,832	NA	NA	1,380	2,017	1,299	55.3%
Per Person Per Day Spending* (\$)	87.3	NA	NA	90.4	93.3	91.9	1.5%
Per Person Per Trip Spending* (\$)	406.7	NA	NA	477.7	446.4	488.2	-8.6%
Length of Stay (days)	4.66	NA	NA	5.28	4.78	5.31	-9.9%
Ship Arrivals from Out-of-State	68	NA	NA	52	66	47	40.4%

From visitors who came by air to board the Hawai'i home-ported ship*	2019	2020	2021	2022	YTD Nov. 2023P	YTD Nov. 2022	% Change
Visitor Days	1,300,196	NA	NA	551,561	1,176,895	450,722	161.1%
Arrivals	121,981	NA	NA	52,626	114,378	42,760	167.5%
Average Daily Census	3,562	NA	NA	1,511	4,311	1,651	161.1%
Length of Stay (days)	10.66	NA	NA	10.48	10.29	10.54	-2.4%
Number of inter-island tours	52	NA	NA	39	47	34	38.2%

*Spending data from visitors on the Hawai'i home-ported ship Pride of America are combined with total spending by visitors who came by air service, published monthly on the HTA and DBEDT websites.

¹ Counts, characteristics and spending of visitors who came by out-of-state cruise ships to Hawai'i are combined with statistics from visitors who came by air service to calculate total visitor data for the state of Hawai'i .

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Market Summary

- In 1882, Matson Navigation began offering commercial steamship service to Hawai'i. In 1887 Matson launched the *Lurline* steamship which began offering passenger service from San Francisco to the Hawaiian Islands. In 1914, Matson also started passenger service to Hawai'i from Los Angeles. With increasing passenger traffic to Hawai'i, Matson built the luxury liner, S.S. *Malolo*, in 1927, followed by luxury liners *Mariposa*, *Monterey* and another *Lurline* steamship between 1930 and 1932. These "White Ships" were instrumental in the development of tourism in Hawai'i. During World War II, Matson halted passenger service and used these ships for troop movement. By 1946, steamships returned to Hawai'i with capacity of over 700 passengers each. As air travel to Hawai'i evolved and demand increased, Matson pulled out of the cruise passenger business in 1971.
- From 1970 to 1984, cruise ships sporadically visited the Hawaiian Islands, until 1985 when American Hawaiian Cruises ships *SS Independence* and *SS Constitution* began operating 7-day interisland cruises. After the events of September 11, 2001, and the resulting drop in tourism, American Hawaii Cruises ended cruise operation in Hawai'i. Seeing an opportunity, Norwegian Cruise Lines (NCL) entered the interisland cruise market in 2001. Hawai'i's cruise industry saw cyclical growth over the next two decades. The highest total number of cruise arrivals recorded was in 2007 with 503,019 visitors, of which 130,999 visitors came on 80 tours from out-of-state cruise ships. Another 372,021 visitors came by air to board three NCL Hawai'i home-ported ships, *Pride of Aloha*, *Pride of America* and *Pride of Hawai'i* for interisland tours. The *Pride of Aloha* and *Pride of Hawai'i* stopped service by May 2008, and the *Pride of America* continued to operate interisland cruises to the present day.
- Cruise visitor arrivals and spending grew between 2016 to 2019, until COVID-19 halted all tourism to the islands.
- From March 14, 2020, through October 30, 2020, the Center for Disease Control and Prevention (CDC) enforced a "No Sail Order" on all cruise ships due to the risk of transmitting COVID-19. On November 1, 2020, the CDC implemented a "Conditional Sail Order", a phased approach for the resumption of passenger cruises. Due to these restrictions, cruise activities were suspended from mid-March 2020 through December 2021.
- Out-of-state cruise ships resumed sails to Hawai'i in January 2022. However, ships that came during the first quarter of 2022 operated at 50-70 percent of capacity, due to social distancing protocol and safety requirements. The Hawai'i home-ported cruise ship *Pride of America* (POA) suspended interisland cruises in the first quarter of 2022. POA resumed operation in April 2022 and operated at 50-60 percent capacity through August 2022. As COVID-19 cases declined and

restrictions eased, by year end 2022 most out-of-state cruise ships to Hawai'i and the Pride of America were operating at 80-85 percent of capacity.

- For the first 11 months of 2023, 140,831 visitors entered Hawai'i via 66 tours from out-of-state cruise ships. Spending by these visitors was \$62.9 million. There were 6,856 visitors who flew into Honolulu to board a turnaround tour on out-of-state cruise ships. Turnaround tours occurred when visitors who arrived on out-of-state ships toured the islands and then departed Hawai'i by air. After the first group of cruise visitors left, a new group of visitors flew into Honolulu to embark on these ships, toured the islands, then most of them remained on these ships to visit the next port. Another 114,378 visitors came by air to board the Pride of America.
- For the first 11 months of 2022, 81,691 visitors entered Hawai'i via 47 out-of-state cruise ships. Spending by these visitors was \$39.9 million. There were 9,183 visitors who flew into Honolulu to board turnaround tours on out-of-state cruise ships and another 42,759 visitors came by air to board the Pride of America.
- In the first 11 months of 2019, 132,195 visitors came to Hawai'i by way of 62 out-of-state cruise ships. Spending by these visitors was \$54.0 million. There were 7,561 visitors who flew into Honolulu to board turnaround tours on out-of-state cruise ships and 112,392 visitors came by air to board the Pride of America.
- For calendar year 2022, 95,309 visitors entered Hawai'i via 52 tours from out-of-state cruise ships. Spending by visitors who came by cruise ships in 2022 was \$45.5 million. There were 9,183 visitors who flew into Honolulu to board turnaround tours on out-of-state cruise ships.. Additionally, there were 52,626 visitors who came by air to board the Pride of America.
- For calendar year 2019, there were 143,508 visitors who came to the islands via 68 tours from out-of-state cruise ships. Spending from visitors who came by cruise ships in 2019 was \$58.4 million. Another 121,981 visitors flew to the state and boarded the Pride of America.

Market Conditions

- There are 90+ cruise brands operating 447 ships globally.
- It is estimated there will be over 31million people cruising in 2023.
- The largest source market is the USA with over 50 percent of the marketplace.
- The largest sailing region is the Caribbean (38%) followed by the Mediterranean (17.5%). Hawai'i is approximately 1 percent of cruise capacity.
- 94 percent of the cruise brands visiting Hawai'i are from North America.
- The Hawaiian Island's largest cruise partner is Norwegian Cruise Line with the home ported and U.S. flagged vessel, Pride of America. This is closely followed by Carnival Corporation which includes the cruise brands Princess Cruises, Holland America Line, Carnival Cruise Line and Seabourn Cruises.
- The high cruise season is October and April each year as cruise vessels transition between their summer & winter itineraries.
- It is estimated that there will be 16 different cruise brands visiting the Hawaiian Islands in 2023 and 22 cruise brands in 2024.

Distribution by Island

Out-of-state cruise ships Island Visitation	2019	2020	2021	2022	YTD Nov. 2023P	YTD Nov. 2022	% Change
O'ahu	142,388	NA	NA	94,343	140,831	80,725	74.5%
Maui County	125,772	NA	NA	83,002	91,681	69,383	32.1%
Maui	125,679	NA	NA	83,002	91,340	69,383	31.6%
Moloka'i	2,584	NA	NA	1,055	2,365	881	168.6%
Lāna'i	4,546	NA	NA	2,310	4,684	1,952	140.0%
Kaua'i	90,316	NA	NA	61,137	83,499	52,385	59.4%
Hawai'i Island	127,671	NA	NA	85,697	121,870	72,079	69.1%

Hawai'i Home-ported ship Island Visitation	2019	2020	2021	2022	YTD Nov. 2023P	YTD Nov. 2022	% Change
O'ahu	121,981	NA	NA	52,626	114,378	42,760	167.5%
Maui County	121,981	NA	NA	52,626	107,123	42,760	150.5%
Maui	121,981	NA	NA	52,626	107,090	42,760	150.4%
Moloka'i	987	NA	NA	285	811	176	361.6%
Lāna'i	1,069	NA	NA	232	695	199	249.6%
Kaua'i	121,981	NA	NA	52,626	114,378	42,760	167.5%
Hawai'i Island	121,981	NA	NA	52,626	114,378	42,760	167.5%

First Timers vs. Repeat Visitors

Out-of-State Cruise Ships First Time/Repeat visitors	2019	2020	2021	2022	YTD Nov. 2023P	YTD Nov. 2022	% Change
First Time Visitors (%)	35.1	NA	NA	28.4	30.4	29.6	0.8
Repeat Visitors (%)	64.9	NA	NA	71.6	69.6	70.4	-0.8

Hawai'i home-ported ship First Time/Repeat visitors	2019	2020	2021	2022	YTD Nov. 2023P	YTD Nov. 2022	% Change
First Time Visitors (%)	55.5	NA	NA	53.0	55.5	54.8	0.7
Repeat Visitors (%)	44.5	NA	NA	47.0	44.5	45.2	-0.7