



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.

January 2024 Quick Facts

Spending by visitors who came by out-of-state cruise ships ¹ :	\$8.4 million
Arrivals by out-of-state cruise ships:	17,836 visitors
Number of tours from out-of-state cruise ships:	14 tours
Average length of stay:	4.78 days
First time visitors:	40.5%
Repeat visitors:	59.5%

From visitors who came via out-of-state cruise ships	2019	2020	2021	2022	2023P	Jan. 2024P	Jan. 2023P	% Change
Visitor Expenditures (\$ Millions)	58.4	NA	NA	45.5	69.4	8.4	6.8	22.9%
Visitor Days	668,524	NA	NA	503,605	743,504	85,261	75,146	13.5%
Arrivals	143,508	NA	NA	95,309	156,041	17,836	16,648	7.1%
Average Daily Census	1,832	NA	NA	1,380	2,037	2,750	2,424	13.5%
Per Person Per Day Spending* (\$)	87.3	NA	NA	90.4	93.3	98.2	90.6	8.3%
Per Person Per Trip Spending* (\$)	406.7	NA	NA	477.7	444.7	469.3	409.0	14.7%
Length of Stay (days)	4.66	NA	NA	5.28	4.76	4.78	4.51	5.9%
# of tours Out-of-State cruise ships	68	NA	NA	52	73	14	8	75.0%

Due to COVID-19 and the "No Sail" order enforced by the U.S. Centers for Disease Control and Prevention (CDC), there were no cruise ships in Hawaii from April - December 2020. There were no cruise ships in Hawai'i in 2021 due to the "conditional sail" order enforced by the CDC.

From visitors who came by air to board the Hawai'i home-ported ship*	2019	2020	2021	2022	2023P	Jan. 2024P	Jan. 2023P	% Change
Visitor Days	1,300,196	NA	NA	551,561	1,298,086	94,143	98,816	-4.7%
Arrivals	121,981	NA	NA	52,626	126,331	9,201	8,962	2.7%
Average Daily Census	3,562	NA	NA	1,511	3,556	258	271	-4.7%
Length of Stay (days)	10.66	NA	NA	10.48	10.28	10.23	11.03	-7.2%
Number of inter-island tours	52	NA	NA	39	52	4	4	0.0%

*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 Visitor 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.

- In January 2024, 17,836 visitors arrived to the Hawaiian Islands via 14 tours from out-of-state cruise ships. Another 9,201 visitors flew to the state to board the Hawai'i home-ported cruise ship Pride of America. In January 2023, 16,648 visitors (+7.1%) came via eight tours (+75.0%) from out-of-state cruise ships. Another 8,962 visitors (+2.7%) flew to the state to board the Pride of America. In January 2019, 12,033 visitors (+48.2%) arrived via seven tours out-of-state cruise ships. Another 9,358 visitors (-1.7%) came by air to board the Pride of America.
- In 2023, 156,041 visitors entered Hawai'i via 73 tours from out-of-state cruise ships. Spending by these visitors was \$69.4 million. There were 6,856 visitors who flew into Honolulu to board turnaround tours on out-of-state cruise ships. Turnaround tour 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 126,331 visitors came by air to board the Pride of America.

Market Conditions

- There are 90+ cruise brands operating 461 ships globally.
- It is estimated there will be over 33.5 million people cruising in 2024.
- There are 53 ocean cruise vessels on order with 11 new vessels to be delivered in 2024
- 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 22 different cruise brands visiting the Hawaiian Islands in 2024.

Distribution by Island

Out-of-state cruise ships Island Visitation	2019	2020	2021	2022	2023P	Jan. 2024P	Jan. 2023P	% Change
O'ahu	142,388	NA	NA	94,343	156,041	17,836	16,648	7.1%
Maui County	125,772	NA	NA	83,002	96,821	10,711	12,886	-16.9%
Maui	125,679	NA	NA	83,002	96,386	10,703	12,867	-16.8%
Moloka'i	2,584	NA	NA	1,055	2,728	199	176	13.2%
Lāna'i	4,546	NA	NA	2,310	5,193	401	410	-2.1%
Kaua'i	90,316	NA	NA	61,137	91,520	14,550	11,944	21.8%
Hawai'i Island	127,671	NA	NA	85,697	137,080	16,314	12,740	28.1%

Hawai'i Home-ported ship Island Visitation	2019	2020	2021	2022	2023P	Jan. 2024P	Jan. 2023P	% Change
O'ahu	121,981	NA	NA	52,626	126,331	9,201	8,962	2.7%
Maui County	121,981	NA	NA	52,626	119,076	9,201	8,962	2.7%
Maui	121,981	NA	NA	52,626	119,043	9,201	8,962	2.7%
Moloka'i	987	NA	NA	285	868	62	48	30.3%
Lāna'i	1,069	NA	NA	232	848	62	64	-3.2%
Kaua'i	121,981	NA	NA	52,626	126,331	9,201	8,962	2.7%
Hawai'i Island	121,981	NA	NA	52,626	126,331	9,201	8,962	2.7%

First Timers vs. Repeat Visitors

Out-of-State Cruise Ships First Time/Repeat visitors	2019	2020	2021	2022	2023P	Jan. 2024P	Jan. 2023P	% Change
First Time Visitors (%)	35.1	NA	NA	28.4	30.6	40.5	28.1	12.4
Repeat Visitors (%)	64.9	NA	NA	71.6	69.4	59.5	71.9	-12.4

Hawai'i home-ported ship First Time/Repeat visitors	2019	2020	2021	2022	2023P	Jan. 2024P	Jan. 2023P	% Change
First Time Visitors (%)	55.5	NA	NA	53.0	54.7	49.7	49.4	0.3
Repeat Visitors (%)	44.5	NA	NA	47.0	45.3	50.3	50.6	-0.3