



Cruise Fact Sheet

Cruise Overview

Cruise ships have played a vital role in Hawaii’s tourism industry for nearly 150 years. The Hawaii’s 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 June 2024 Quick Facts

Spending by visitors who came by out-of-state cruise ships ¹ :	\$45.0 million
Arrivals by out-of-state cruise ships:	86,748 visitors
Number of trips from out-of-state cruise ships:	48 trips
Average length of stay:	4.86 days
First time visitors:	36.6%
Repeat visitors:	63.4%

From visitors who came via out-of-state cruise ships	2019	2020*	2021	2022	2023P	YTD June 2024P	YTD June 2023P	% Change
Visitor Expenditures (\$ Millions)	58.4	11.5	NA	45.5	69.4	45.0	36.5	23.2%
Visitor Days	668,524	142,979	NA	503,605	743,504	421,549	399,167	5.6%
Arrivals	143,508	30,185	NA	95,309	156,041	86,748	80,958	7.2%
Average Daily Census	1,832	1,571	NA	1,380	2,037	2,316	2,205	5.0%
Per Person Per Day Spending* (\$)	87.3	80.6	NA	90.4	93.3	106.8	91.5	16.6%
Per Person Per Trip Spending* (\$)	406.7	382.0	NA	477.7	444.7	518.9	451.4	14.9%
Length of Stay (days)	4.66	4.74	NA	5.28	4.76	4.86	4.93	-1.4%
# of trips Out-of-State cruise ships	68	18	NA	52	73	48	37	29.7%

2020* = Data are from January – March 2020. Due to COVID-19 and the "No Sail" order enforced by the CDC, there were no cruise ships in Hawaii from April - December 2020.

2021 = There were no cruise ships in Hawaii in 2021 due to the "conditional sail" order enforced by the CDC.

2023 and 2024 visitor data are preliminary. 2019 – 2022 visitor data are the final numbers and reflect updated data from ship agents and from Portcall.com

From visitors who came by air to board the Hawaii home-ported ship*	2019	2020*	2021	2022	2023P	YTD June 2024P	YTD June 2023P	% Change
Visitor Days	1,300,196	240,153	NA	551,561	1,298,086	634,085	627,581	1.0%
Arrivals	121,981	22,913	NA	52,626	126,331	61,924	60,861	1.7%
Average Daily Census	3,562	2,639	NA	1,511	3,556	3,484	3,467	0.5%
Length of Stay (days)	10.66	10.48	NA	10.48	10.28	10.24	10.31	-0.7%
Number of inter-island trips	52	10	NA	39	52	26	25	4.0%

*Spending data from visitors on the Hawaii 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 Hawaii are combined with statistics from visitors who came by air service to calculate total visitor data for the state of Hawaii.

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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 the first half of 2024, 86,748 visitors came to Hawai'i via 48 tours aboard out-of-state cruise ships. There were 1,858 visitors who flew into Honolulu to board the turnaround tour on an out-of-state cruise ship. A turnaround tour occurs when visitors that arrived by cruise ship depart by air after touring the islands. After the initial group of cruise visitors leave, a new group of visitors fly in to board that ship, tour the islands, then most of them will remain with the ship to visit the next out-of-state port. Another 61,924 visitors came by air to board the Pride of America.
- For the first half of 2023, 80,958 visitors entered Hawai'i via 37 out-of-state cruise ships. There were 1,852 visitors who flew into Honolulu to board a turnaround tour on an out-of-state cruise ship and another 60,861 visitors came by air to board the Pride of America.
- In the first half of 2019, 77,036 visitors came to Hawai'i by way of 37 out-of-state cruise ships and 64,238 visitors flew to Hawai'i and boarded the Pride of America.
- In 2023, 156,041 visitors entered Hawai'i via 73 trips 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 trips on out-of-state cruise ships. Another 126,331 visitors came by air to board the Pride of America.

Market Conditions

- There are 90+ cruise brands operating 441 ships globally.
- It is estimated there will be over 34 million people cruising in 2024.
- There are 62 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 (40.4%) followed by the Mediterranean (15.9%). Hawai'i is approximately .7 percent of cruise capacity.
- 96 percent of the cruise brands visiting Hawai'i in 2024 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 24 different cruise brands visiting the Hawaiian Islands in 2024.

Distribution by Island

Out-of-state cruise ships Island Visitation	2019	2020*	2021	2022	2023P	YTD June 2024P	YTD June 2023P	% Change
O'ahu	142,388	30,185	NA	94,343	156,041	86,748	80,958	7.2%
Maui County	125,772	27,222	NA	83,002	96,821	38,290	66,082	-42.1%
Maui	125,679	27,219	NA	83,002	96,386	38,147	66,004	-42.2%
Moloka'i	2,584	519	NA	1,055	2,728	1,409	1,171	20.3%
Lāna'i	4,546	940	NA	2,310	5,193	2,252	2,751	-18.1%
Kaua'i	90,316	22,642	NA	61,137	91,520	53,619	45,185	18.7%
Hawai'i Island	127,671	27,026	NA	85,697	137,080	73,650	70,951	3.8%

Hawai'i Home-ported ship Island Visitation	2019	2020*	2021	2022	2023P	YTD June 2024P	YTD June 2023P	% Change
O'ahu	121,981	22,913	NA	52,626	126,331	61,924	60,861	1.7%
Maui County	121,981	22,913	NA	52,626	119,076	61,924	60,861	1.7%
Maui	121,981	22,913	NA	52,626	119,043	61,924	60,861	1.7%
Moloka'i	987	266	NA	285	868	264	327	-19.3%
Lāna'i	1,069	246	NA	232	848	375	401	-6.6%
Kaua'i	121,981	22,913	NA	52,626	126,331	61,924	60,861	1.7%
Hawai'i Island	121,981	22,913	NA	52,626	126,331	61,924	60,861	1.7%

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First Timers vs. Repeat Visitors

Out-of-State Cruise Ships First Time/Repeat visitors	2019	2020*	2021	2022	2023P	YTD June 2024P	YTD June 2023P	% Change
First Time Visitors (%)	35.1	34.2	NA	28.4	30.6	36.6	29.2	7.4
Repeat Visitors (%)	64.9	65.8	NA	71.6	69.4	63.4	70.8	-7.4

Hawai'i home-ported ship First Time/Repeat visitors	2019	2020*	2021	2022	2023P	YTD June 2024P	YTD June 2023P	% Change
First Time Visitors (%)	55.5	55.4	NA	53.0	54.7	55.8	55.9	-0.04
Repeat Visitors (%)	44.5	44.6	NA	47.0	45.3	44.2	44.1	0.04

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