



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 August 2024 Quick Facts

Spending by visitors who came by out-of-state cruise ships ¹ :	\$45.2 million
Arrivals by out-of-state cruise ships:	87,420 visitors
Number of trips from out-of-state cruise ships:	49 trips
Average length of stay:	4.84 days
First time visitors:	36.6%
Repeat visitors:	63.4%

From visitors who came via out-of-state cruise ships	2019	2020*	2021	2022	2023	YTD Aug. 2024P.	YTD Aug. 2023.	% Change
Visitor Expenditures (\$ Millions)	58.4	11.5	NA	45.5	71.5	45.2	41.7	8.4%
Visitor Days	668,524	142,979	NA	503,605	751,888	423,000	435,395	-2.8%
Arrivals	143,508	30,185	NA	95,309	157,612	87,420	89,091	-1.9%
Average Daily Census	1,832	1,571	NA	1,380	2,060	1,734	1,784	-2.8%
Per Person Per Day Spending* (\$)	87.3	80.6	NA	90.4	95.1	106.8	95.7	11.6%
Per Person Per Trip Spending* (\$)	406.7	382.0	NA	477.7	453.5	516.7	467.6	10.5%
Length of Stay (days)	4.66	4.74	NA	5.28	4.77	4.84	4.89	-1.0%
# of trips Out-of-State cruise ships	68	18	NA	52	74	49	40	22.5%

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.

2024P visitor data are preliminary. 2019 – 2023 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	2023	YTD Aug. 2024P.	YTD Aug. 2023.	% Change
Visitor Days	1,300,196	240,153	NA	551,561	1,298,086	870,389	858,320	1.4%
Arrivals	121,981	22,913	NA	52,626	126,331	84,438	83,856	0.7%
Average Daily Census	3,562	2,639	NA	1,511	3,556	3,567	3,532	1.0%
Length of Stay (days)	10.66	10.48	NA	10.48	10.28	10.31	10.24	0.7%
Number of inter-island trips	52	10	NA	39	52	35	34	2.9%

*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 eight months of 2024, 87,420 visitors came to Hawai'i via 49 trips aboard out-of-state cruise ships. There were 1,858 visitors who flew into Honolulu to board a turnaround trip on an out-of-state cruise ship. A turnaround trip 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 84,437 visitors came by air to board the Pride of America.
- For the first eight months of 2023, 89,091 visitors entered Hawai'i via 40 trips aboard 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 83,856 visitors came by air to board the Pride of America.
- In the first eight months of 2019, 77,036 visitors came by way of 37 trips from out-of-state cruise ships and 86,188 visitors flew to Hawai'i and boarded the Pride of America.
- In 2023, 157,612 visitors entered Hawai'i via 74 trips from out-of-state cruise ships. Spending by these visitors was \$71.5 million. There were 6,881 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.
- Seabourn unveiled new itineraries aboard the Seabourn Quest, set to explore Australia, New Zealand, the South Pacific, Hawai'i and the Panama Canal from December 2025 to April 2026. The Seabourn Quest will offer itineraries ranging from 10 to 48 days, featuring stops at less-explored ports. Highlights include the new 10-day roundtrip voyages from Papeete, a 19-day Panama Canal Passage from Long Beach, California, to Miami and 15-day voyages in Australia and New Zealand. Select voyages will feature overnight calls in Cairns and Melbourne in Australia, as well as Bora Bora and Tahiti in French Polynesia. Additionally, there will be extended stays in Napier, New Zealand; Honolulu and Kona, Hawai'i; Puerto Vallarta, Mexico; and Cartagena, Colombia.

- Royal Caribbean Group announced that it has signed an agreement with Finnish shipbuilder Meyer Turku to order a fourth Icon Class ship for delivery to Royal Caribbean International in 2027. The agreement also includes options to build a fifth and sixth Icon Class ship. The new order follows the Icon of the Seas, which launched earlier this year. Star of the Seas (launching in 2025) and the yet-to-be-named third Icon Class ship (launching in 2026). With this order, Meyer Turku will have built 21 ships for the Royal Caribbean Group over 28 years.
- Norwegian Cruise Line's Newbuilds Grow in Size. Coming from the Fincantieri shipyard, the new vessels are part of an eight-ship order placed earlier this year. According to information shared during the company's second quarter earnings presentation, instead of 200,000 tons, four of the vessels will have approximately 225,000 tons, with a capacity for roughly 5,100 guests each. In addition to the new class, Norwegian Cruise Line's orderbook also includes four additional Prima-class ships. Part of a previous six-ship order, the lineup includes the Norwegian Aqua, which is set to enter service in 2025.
- With 15 new cruise ships set to enter service next year, cruise lines are expected to hire over 20,000 new crew members in 2025 just to accommodate the pipeline of new ships. The figure includes the total number of new crew members that will be onboard the new vessels, as well as 25 percent additional staff to compensate for vacation times.
- According to the Cruise Industry News Global Cruise Ship Index, the newbuilds will add nearly 40,000 guest berths to the market.
- Onboard Revenue Reaches New Highs:
 - With onboard revenue playing an increasingly larger role for the bottom line, Norwegian Cruise Line Holdings (NCLH) reported gross onboard spend per passenger per day estimated at \$126.85 and net \$98.51 (after related costs) for the second quarter ended June 30, 2024, up significantly from \$96.70 and \$75.35 respectively in the second quarter 2019, the last "normal" year before the cruise industry's recovery.
 - Royal Caribbean Group reported gross onboard spend per passenger per day estimated at \$92.44 and net of \$74.00 for the second quarter of 2024, compared to \$69.67 and \$54.27 respectively in 2019.
 - Carnival Corporation reported gross onboard spend per passenger per day estimated at \$83.41 and net of \$57.57 for its second quarter ended May 31, 2024, compared to \$66.25 and \$44.97 respectively in 2019.

Distribution by Island

Out-of-state cruise ships Island Visitation	2019	2020*	2021	2022	2023	YTD Aug. 2024P	YTD Aug. 2023	% Change
O'ahu	142,388	30,185	NA	94,343	157,612	87,420	89,091	-1.9%
Maui County	125,772	27,222	NA	83,002	96,720	38,389	70,121	-45.3%
Maui	125,679	27,219	NA	83,002	96,393	38,240	70,018	-45.4%
Moloka'i	2,584	519	NA	1,055	2,874	1,420	1,591	-10.8%
Lāna'i	4,546	940	NA	2,310	5,150	2,252	3,066	-26.5%
Kaua'i	90,316	22,642	NA	61,137	90,915	53,691	51,438	4.4%
Hawai'i Island	127,671	27,026	NA	85,697	136,743	73,727	77,398	-4.7%

Hawai'i Home-ported ship Island Visitation	2019	2020*	2021	2022	2023	YTD Aug. 2024P	YTD Aug. 2023	% Change
O'ahu	121,981	22,913	NA	52,626	126,331	84,438	83,856	0.7%
Maui County	121,981	22,913	NA	52,626	119,076	84,438	76,601	10.2%
Maui	121,981	22,913	NA	52,626	119,043	84,438	76,568	10.3%
Moloka'i	987	266	NA	285	868	328	527	-37.8%
Lāna'i	1,069	246	NA	232	848	398	580	-31.5%
Kaua'i	121,981	22,913	NA	52,626	126,331	84,438	83,856	0.7%
Hawai'i Island	121,981	22,913	NA	52,626	126,331	84,438	83,856	0.7%

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.

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

First Timers vs. Repeat Visitors

Out-of-State Cruise Ships First Time/Repeat visitors	2019	2020*	2021	2022	2023	YTD Aug. 2024P	YTD Aug. 2023	% Change
First Time Visitors (%)	35.1	34.2	NA	28.4	32.8	36.6	32.4	4.3
Repeat Visitors (%)	64.9	65.8	NA	71.6	67.2	63.4	67.6	-4.3

Hawai'i home-ported ship First Time/Repeat visitors	2019	2020*	2021	2022	2023	YTD Aug. 2024P	YTD Aug. 2023	% Change
First Time Visitors (%)	55.5	55.4	NA	53.0	54.7	54.8	55.1	-0.3
Repeat Visitors (%)	44.5	44.6	NA	47.0	45.3	45.2	44.9	0.3

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