



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 2024 Quick Facts

Spending by visitors who came by out-of-state cruise ships ¹ :	\$75.8 million
Arrivals by out-of-state cruise ships:	149,980 visitors
Number of trips from out-of-state cruise ships:	77 trips
Average length of stay:	4.60 days
First time visitors:	35.8%
Repeat visitors:	64.2%

From visitors who came via out-of-state cruise ships	2019	2020*	2021	2022	2023	YTD Nov. 2024P	YTD Nov. 2023	% Change
Visitor Expenditures (\$ Millions)	58.4	11.5	NA	45.5	71.5	75.8	64.9	16.8%
Visitor Days	668,524	142,979	NA	503,605	751,888	689,254	679,288	1.5%
Arrivals	143,508	30,185	NA	95,309	157,612	149,980	142,422	5.3%
Average Daily Census	1,832	1,571	NA	1,380	2,060	2,057	2,034	1.2%
Per Person Per Day Spending* (\$)	87.3	80.6	NA	90.4	95.1	110.0	95.6	15.1%
Per Person Per Trip Spending* (\$)	406.7	382.0	NA	477.7	453.5	505.7	455.8	10.9%
Length of Stay (days)	4.66	4.74	NA	5.28	4.77	4.60	4.77	-3.6%
# of trips Out-of-State cruise ships	68	18	NA	52	74	77	67	14.9%

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 Hawai'i 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 Hawai'i home-ported ship*	2019	2020*	2021	2022	2023	YTD Nov. 2024P	YTD Nov. 2023	% Change
Visitor Days	1,300,196	240,153	NA	551,561	1,298,086	1,173,564	1,176,895	-0.3%
Arrivals	121,981	22,913	NA	52,626	126,331	114,042	114,378	-0.3%
Average Daily Census	3,562	2,639	NA	1,511	3,556	3,503	3,524	-0.6%
Length of Stay (days)	10.66	10.48	NA	10.48	10.28	10.29	10.29	0.0%
Number of inter-island trips	52	10	NA	39	52	48	47	2.1%

*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.

Contact Information

Hawai'i Tourism Authority: Jennifer Bastiaanse
Brand Manager
Tel: (808) 973-2262
jbastiaanse@gohta.net

Access Cruise, Inc: Shannon McKee
President
Tel: (305) 582-2095
shannon@accesscruiseinc.com

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 11 months of 2024, 149,980 visitors came to Hawai'i via 77 trips aboard out-of-state cruise ships. There were 5,542 visitors who flew into Honolulu to board turnaround trips on out-of-state cruise ships. 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 114,042 visitors came by air to board the Pride of America.

- For the first 11 months of 2023, 142,422 visitors (+5.3%) entered Hawai'i via 67 trips aboard out-of-state cruise ships. There were 6,881 visitors who flew into Honolulu to board turnaround trips on out-of-state cruise ships. Another 114,378 visitors (-0.3%) came by air to board the Pride of America.
- In the first 11 months of 2019, 132,195 visitors (+13.5%) came to Hawai'i by way of 62 trips aboard out-of-state cruise ships. There were 7,561 visitors who flew into Honolulu to board turnaround tours on out-of-state cruise ships. Another 112,392 visitors (+1.5%) came by air to board 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.
- 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.
- The Royal Caribbean Group has entered into an agreement to acquire the Port of Costa Maya in Mexico, according to a recent SEC filing. The deal was closed in September 2024 and also includes adjacent land in Mahahual, Quintana Roo, for approximately \$292 million. In October 2024, Royal Caribbean International announced plans to develop a new cruise destination in the region, Perfect Day Mexico.
- The Norwegian Prima will debut in New Orleans in late 2026, Norwegian Cruise Line recently announced in a press release. As part of their 2026-27 winter season, the vessel is scheduled to offer seven-night cruises to the Western Caribbean.
- Viking reported that third-quarter 2024 results of total revenue increased 11.4 percent, or \$171.9 million compared to the same period in 2023. Gross margin increased 18.0 percent and Adjusted Gross Margin increased 12.0 percent compared to the same period in 2023. Adjusted EBITDA increased 15.3 percent compared to the same period in 2023.
- The Massachusetts Port Authority celebrated a record-breaking passenger count at Flynn Cruise port Boston for 2024 with just over 480,000 passengers; this is a 29 percent passenger increase over 2023. Flynn Cruise port welcomed 167 cruise ships this season, 18 more ships and a 12 percent increase over 2023. In addition, Massport announced a \$60 million investment in a shore power system that should be completed by 2029.
- At Port Canaveral - Building upon its distinction as the world's second busiest cruise port, they reported a record 7.6 million passenger movements – a 12-percent increase over the previous year – with 13 homeported ships, 911 cruise ship calls, and 914,000 vehicles parked. Over the past year, the port also added new parking facilities and an upgraded parking processing system.
- Port Everglades bested its own cruise passenger record with a preliminary count of 4,010,919 guests embarking and disembarking during Fiscal Year 2024, which ended September 30, 2024. The new record is expected to be short lived, however, as 4.4 million guests are anticipated during Fiscal Year 2025, according to a press release from the port. In just one year, cruise passenger counts grew 39 percent and cruise ship calls rose 23 percent as the cruise lines fully recovered from the pandemic.

- Port Miami announced its highest-ever cruise passenger total of 8,233,056 travelers in Fiscal Year 2024. The Port experienced a 12.8 percent increase in cruise passenger totals compared to its previous record of 7,299,294 passengers in Fiscal Year 2023. Among the new lineup of ships which will begin departing from Port Miami this season are the Explora II, Resilient Lady, World America, Norwegian Aqua, Brilliant Lady and Oceania Allura. MSC Cruises' new Cruise Terminal AA will open this coming spring. Once completed, it will be the largest cruise terminal in North America. On the west end of the port, construction will begin on the new Cruise Terminal G for Royal Caribbean International in summer 2025.
- Industry Fleet Update: According to the cruise orderbook there will be 67 new ships and 170,000 Berths by 2036
- With the recent addition of two newbuilds for Viking, the new vessels are now scheduled to add over 170,000 berths to the global cruise market.
- Among major cruise corporations, Norwegian Cruise Line Holdings is leading the way in number of newbuilds with 13 vessels on order for its three brands by 2036.
- After welcoming three new ships to its fleet this year, the Royal Caribbean Group will take delivery of seven new vessels by 2028.
- MSC Cruises is also growing its fleet significantly, with seven ships entering service for its two brands through 2028.
- Carnival Corporation is building six new ships by 2033, including one for the Princess Cruises brand and five for the Carnival Cruise Line brand.
- Overall numbers point to 2025 and 2026 as big years for the cruise building business, with 15 vessels entering service each year.
- Twelve cruise ships are already on order for 2027, while another seven are set to enter service in 2028, six in 2029 and five in 2030.

Distribution by Island

Out-of-state cruise ships Island Visitation	2019	2020*	2021	2022	2023	YTD Nov. 2024P	YTD Nov. 2023	% Change
O'ahu	142,388	30,185	NA	94,343	157,612	149,980	142,422	5.3%
Maui County	125,772	27,222	NA	83,002	96,720	71,184	91,143	-21.9%
Maui	125,679	27,219	NA	83,002	96,393	70,981	90,862	-21.9%
Moloka'i	2,584	519	NA	1,055	2,874	2,305	2,538	-9.2%
Lāna'i	4,546	940	NA	2,310	5,150	3,800	4,539	-16.3%
Kaua'i	90,316	22,642	NA	61,137	90,915	89,921	82,782	8.6%
Hawai'i Island	127,671	27,026	NA	85,697	136,743	117,407	121,553	-3.4%

Hawai'i Home-ported ship Island Visitation	2019	2020*	2021	2022	2023	YTD Nov. 2024P	YTD Nov. 2023	% Change
O'ahu	121,981	22,913	NA	52,626	126,331	114,042	114,378	-0.3%
Maui County	121,981	22,913	NA	52,626	119,076	114,042	107,123	6.5%
Maui	121,981	22,913	NA	52,626	119,043	114,042	107,090	6.5%
Moloka'i	987	266	NA	285	868	444	811	-45.3%
Lāna'i	1,069	246	NA	232	848	643	695	-7.4%
Kaua'i	121,981	22,913	NA	52,626	126,331	114,042	114,378	-0.3%
Hawai'i Island	121,981	22,913	NA	52,626	126,331	114,042	114,378	-0.3%

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 Hawai'i in 2021 due to the "conditional sail" order enforced by the CDC.

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 Nov. 2024P	YTD Nov. 2023	% Change
First Time Visitors (%)	35.1	34.2	NA	28.4	32.8	35.8	33.0	2.8
Repeat Visitors (%)	64.9	65.8	NA	71.6	67.2	64.2	67.0	-2.8

Hawai'i home-ported ship First Time/Repeat visitors	2019	2020*	2021	2022	2023	YTD Nov. 2024P	YTD Nov. 2023	% Change
First Time Visitors (%)	55.5	55.4	NA	53.0	54.7	55.4	55.5	-0.1
Repeat Visitors (%)	44.5	44.6	NA	47.0	45.3	44.6	44.5	0.1

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 Hawai'i in 2021 due to the "conditional sail" order enforced by the CDC.

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