



# 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 December 2024 Quick Facts

Spending by visitors who came by out-of-state cruise ships <sup>1</sup> :	\$86.8 million
Arrivals by out-of-state cruise ships:	168,035 visitors
Number of trips from out-of-state cruise ships:	87 trips
Average length of stay:	4.66 days
First time visitors:	34.8%
Repeat visitors:	65.2%

From visitors who came via out-of-state cruise ships	2019	2020*	2021	2022	2023	YTD Dec. 2024P	YTD Dec. 2023	% Change
Visitor Expenditures (\$ Millions)	58.4	11.5	NA	45.5	71.5	86.8	71.5	21.4%
Visitor Days	668,524	142,979	NA	503,605	751,888	782,981	751,888	4.1%
Arrivals	143,508	30,185	NA	95,309	157,612	168,035	157,612	6.6%
Average Daily Census	1,832	1,571	NA	1,380	2,060	2,139	2,060	3.9%
Per Person Per Day Spending* (\$)	87.3	80.6	NA	90.4	95.1	110.8	95.1	16.6%
Per Person Per Trip Spending* (\$)	406.7	382.0	NA	477.7	453.5	516.4	453.5	13.9%
Length of Stay (days)	4.66	4.74	NA	5.28	4.77	4.66	4.77	-2.3%
# of trips Out-of-State cruise ships	68	18	NA	52	74	87	74	17.6%

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 Dec. 2024P	YTD Dec. 2023	% Change
Visitor Days	1,300,196	240,153	NA	551,561	1,298,086	1,280,364	1,298,086	-1.4%
Arrivals	121,981	22,913	NA	52,626	126,331	123,676	126,331	-2.1%
Average Daily Census	3,562	2,639	NA	1,511	3,556	3,498	3,556	-1.6%
Length of Stay (days)	10.66	10.48	NA	10.48	10.28	10.35	10.28	0.8%
Number of inter-island trips	52	10	NA	39	52	52	52	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.

<sup>1</sup> 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

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## Market Summary

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- 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 calendar year 2024, 168,035 visitors came to Hawai'i via 87 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 who arrived on an out-of-state ship depart by air service after touring the Hawaiian Islands. After the first group of cruise visitors leaves, a new group of visitors flies

into Honolulu to board the ship, tour the islands, then most of them remain with the ship to visit the next out-of-state port. Another 123,676 visitors came by air to board the Pride of America.

- In 2023, 157,612 visitors (+6.6%) entered Hawai'i via 74 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 126,331 visitors (-2.1%) came by air to board the Pride of America.
- In pre-pandemic 2019, 143,508 visitors (+17.1%) came to Hawai'i by way of 68 trips from out-of-state cruise ships. There were 7,561 visitors who flew into Honolulu to board turnaround trips on out-of-state cruise ships. Another 121,981 visitors (+1.4%) came by air and boarded the Pride of America.

## Market Conditions

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- 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.
- Cruise Lines International Association (CLIA) appointed Charles 'Bud' Darr as president/CEO, joining from MSC Group. Bud Darr will take the CLIA helm Feb. 3, 2025, succeeding Kelly Craighead. Darr returns to CLIA, having previously served as SVP technical and regulatory affairs from 2010 to 2017. Since then, he's been based in Geneva as EVP maritime policy and government affairs for MSC Group.

- Top Profitability Stories of 2024

After mostly returning to profitability in 2023, the world's largest cruise corporations continued to improve their financial positions in 2024.

- Carnival Corporation - Reported a full year adjusted EBITDA of \$6.1 billion, over 40 percent higher than the prior year. Full year revenues hit an all-time high of \$25 billion, over 15 percent higher than the prior year, with continued strength in demand. Full year net income of \$1.9 billion; adjusted net income of \$1.9 billion outperforms September guidance by over \$130 million. Record full-year operating income of \$3.6 billion, over 80 percent higher than the prior year. Adjusted return on invested capital ("ROIC") of 11 percent. Record fourth quarter revenues of \$5.9 billion, 10 percent higher than the prior year, delivering record adjusted EBITDA. Cumulative advanced booked position for full year 2025 is at an all-time high for both price (in constant currency) and occupancy. And adjusted EBITDA per available lower berth ("ALBD") for 2025 is expected to be the highest in almost two decades, achieving 2026 SEA Change target one year in advance.
- Royal Caribbean Group - After seeing an adjusted EBITDA of \$2.1 billion in the third quarter of 2024, the Royal Caribbean Group reported that, in 2024, its adjusted EPS is expected to grow 71 percent year-over-year and be in the range of \$11.57 to \$11.62.
- Norwegian Cruise Line Holdings - In the third quarter of 2024, reported that its adjusted EBITDA grew 24 percent to \$931.0 million, a quarterly record high. The company also expects its 2024 full year adjusted EBITDA to increase, reaching approximately \$2.425 billion.
- The Atlantic Canada Cruise Association (ACCA) - Announced that the region recorded over 1 million cruise passengers in 2024, marking a record-breaking season with over 675 calls between April and November 2024. The 2024 cruise season saw a notable increase in cruise calls during spring and summer, showing a 30 percent increase compared to 2023. Over 25 cruise lines visited the region,

including several maiden calls. From bustling port cities to hidden coastal gems, the region's diverse offerings drew travelers seeking authentic and memorable experiences, the ACCA said in a statement.

- Virgin Voyages had record-breaking sales and revenue growth - Virgin Voyages is celebrating record sales and revenue growth with Black Friday marking the highest booking day in company history. They saw a 300 percent increase in revenue and bookings compared to 2023. Overall revenue has risen by over 60 percent, with a projected 50 percent growth in 2025. In addition to record bookings for the Mediterranean and Caribbean sailings, the brand has seen strong interest in its new Alaska itineraries, longer voyages to Iceland, and solar eclipse cruises in 2026.
- Princess Reported Record Black Friday and Cyber Monday Bookings - The four-day booking stretch saw a 32 percent increase in bookings compared to the same timeframe in 2023, with a strong interest in 2025 and 2026 sailings. Cyber Monday led the surge, with bookings up 136 percent year-over-year. Demand was particularly strong for 2026 itineraries, which saw a 66 percent increase compared to bookings for 2025 sailings during the same period last year. The company recently introduced several new itineraries for 2025 and 2026, including expanded offerings in regions like Alaska, Europe, and the Caribbean.
- New Ships in Service in 2024:

Cruise lines welcomed ten new cruise ships into their fleets in 2024, with newbuilds coming in different sizes and types. The lineup included Princess' new Sun Princess, Royal Caribbean's Utopia of the Seas, Explora's Explora II, Disney's Treasure, and more.
- New Ship Orders Summary of 2024
  - After a year-long hiatus, Carnival Corporation, Royal Caribbean Group and Norwegian Cruise Line Holdings placed new ship orders, with the latter announcing a record-breaking deal to take delivery of eight new ships over the next decade.
  - While Viking kept ordering new luxury vessels, Disney Cruise Line also announced plans to add five ships to its fleet over the next six years.
- Additional Market Conditions of 2024
  - Newbuilds continue to get larger - The new ships being ordered are getting significantly bigger, with more companies set to take delivery of 200,000-ton-plus ships over the next few years. A series of new ships for Norwegian Cruise Line that will debut starting in 2030 will be 225,000 tons each, with capacity for 5,100 guests.
  - Luxury remains up - The luxury market has kept up the momentum in 2024, with more upscale vessels being ordered for various brands. Viking confirmed orders for four ships during the year, while Crystal ordered three newbuilds, Windstar revealed plans to add two ships to its fleet and Emerald ordered another yacht.
  - Class of 2024 newbuilds focus on innovation - In another strong year for the cruise business, a number of innovative vessels were delivered to various brands in 2024.
    - Princess Cruises - As the first ship in a new series known as the Sphere Class, the 175,000-ton vessel Sun Princess was delivered to Princess Cruises in February. Taking over the title of largest ship ever built for the company.
    - Cunard - In April, Queen Anne became the first new ship to enter service for Cunard in over ten years. The 3,000-guest ship spent its maiden season in Europe.
    - TUI Cruises - Completing a series of ships that started with the Mein Schiff 3 in 2014, the Mein Schiff 7 was delivered to TUI Cruises in June. The 2,900-guest ship entered service for the company in Northern Europe.
    - Royal Caribbean International welcomed Utopia of the Seas to its fleet in June. This 231,000-ton vessel, the sixth in the company's Oasis Class, is sailing out of Port Canaveral.

- Ritz Carlton's Ilma was delivered in July. As the second ultra luxury vessel in the company's fleet, the 456-guest vessel welcomed its first guests in September.
  - Disney Treasure was delivered by the Meyer Werft shipyard in October. The LNG-powered ship kicked off a series of cruises to the Caribbean departing from Port Canaveral in December.
  - Other ships delivered in 2024 include - Brilliant Lady (Virgin Voyages); Silver Ray (Silversea); Explora II (Explora Journeys) and Viking Vela (Viking Ocean).
- **Cruise Port Updates**
    - Port Miami is the first major cruise port on the U.S. eastern seaboard that will offer shore power capability at five cruise berths.
    - New Port & Terminal - 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.
    - Antigua Cruise Port is on track to break its annual passenger record, with 570 cruise calls and 825,526 passengers in 2024. This figure marks a 27 percent increase in ship calls and a 23 percent increase in passenger arrivals compared to 2023. Both the Arvia and Emerald Azzurra are homeporting at Heritage Quay. P&O Cruises' (subsidiary of Carnival) Arvia and the Emerald Cruises' (subsidiary of Scenic Group) Azzurra are homeporting at Heritage Quay.
    - Western cruise lines returned to China in 2024, led by MSC and Royal Caribbean.

## Distribution by Island

Out-of-state cruise ships Island Visitation	2019	2020*	2021	2022	2023	YTD Dec. 2024P	YTD Dec. 2023	% Change
O'ahu	142,388	30,185	NA	94,343	157,612	168,035	157,612	6.6%
Maui County	125,772	27,222	NA	83,002	96,720	83,656	96,720	-13.5%
Maui	125,679	27,219	NA	83,002	96,393	83,440	96,393	-13.4%
Moloka'i	2,584	519	NA	1,055	2,874	2,663	2,874	-7.3%
Lāna'i	4,546	940	NA	2,310	5,150	4,469	5,150	-13.2%
Kaua'i	90,316	22,642	NA	61,137	90,915	106,364	90,915	17.0%
Hawai'i Island	127,671	27,026	NA	85,697	136,743	135,462	136,743	-0.9%

Hawai'i Home-ported ship Island Visitation	2019	2020*	2021	2022	2023	YTD Dec. 2024P	YTD Dec. 2023	% Change
O'ahu	121,981	22,913	NA	52,626	126,331	123,676	126,331	-2.1%
Maui County	121,981	22,913	NA	52,626	119,076	123,676	119,076	3.9%
Maui	121,981	22,913	NA	52,626	119,043	123,676	119,043	3.9%
Moloka'i	987	266	NA	285	868	444	868	-48.8%
Lāna'i	1,069	246	NA	232	848	643	848	-24.1%
Kaua'i	121,981	22,913	NA	52,626	126,331	123,676	126,331	-2.1%
Hawai'i Island	121,981	22,913	NA	52,626	126,331	123,676	126,331	-2.1%

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

## First Timers vs. Repeat Visitors

Out-of-State Cruise Ships First Time/Repeat visitors	2019	2020*	2021	2022	2023	YTD Dec. 2024P	YTD Dec. 2023	% Change
First Time Visitors (%)	35.1	34.2	NA	28.4	32.8	34.8	32.8	2.0
Repeat Visitors (%)	64.9	65.8	NA	71.6	67.2	65.2	67.2	-2.0

Hawai'i home-ported ship First Time/Repeat visitors	2019	2020*	2021	2022	2023	YTD Dec. 2024P	YTD Dec. 2023	% Change
First Time Visitors (%)	55.5	55.4	NA	53.0	54.7	54.9	54.7	0.2
Repeat Visitors (%)	44.5	44.6	NA	47.0	45.3	45.1	45.3	-0.2

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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