



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 September 2024 Quick Facts

Spending by visitors who came by out-of-state cruise ships ¹ :	\$55.9 million
Arrivals by out-of-state cruise ships:	106,075 visitors
Number of trips from out-of-state cruise ships:	58 trips
Average length of stay:	4.82 days
First time visitors:	36.9%
Repeat visitors:	63.1%

From visitors who came via out-of-state cruise ships	2019	2020*	2021	2022	2023	YTD Sep. 2024P	YTD Sep. 2023	% Change
Visitor Expenditures (\$ Millions)	58.4	11.5	NA	45.5	71.5	55.9	45.4	23.0%
Visitor Days	668,524	142,979	NA	503,605	751,888	511,337	473,376	8.0%
Arrivals	143,508	30,185	NA	95,309	157,612	106,075	97,234	9.1%
Average Daily Census	1,832	1,571	NA	1,380	2,060	1,866	1,734	7.6%
Per Person Per Day Spending* (\$)	87.3	80.6	NA	90.4	95.1	109.3	96.0	13.9%
Per Person Per Trip Spending* (\$)	406.7	382.0	NA	477.7	453.5	526.9	467.3	12.8%
Length of Stay (days)	4.66	4.74	NA	5.28	4.77	4.82	4.87	-1.0%
# of trips Out-of-State cruise ships	68	18	NA	52	74	58	44	31.8%

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 Sep. 2024P	YTD Sep. 2023	% Change
Visitor Days	1,300,196	240,153	NA	551,561	1,298,086	965,951	983,508	-1.8%
Arrivals	121,981	22,913	NA	52,626	126,331	93,602	95,906	-2.4%
Average Daily Census	3,562	2,639	NA	1,511	3,556	3,525	3,603	-2.1%
Length of Stay (days)	10.66	10.48	NA	10.48	10.28	10.32	10.25	0.6%
Number of inter-island trips	52	10	NA	39	52	39	39	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 the first nine months of 2024, 106,075 visitors came to Hawai'i via 58 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 93,602 visitors came by air to board the Pride of America.
- For the first nine months of 2023, 97,234 visitors (+9.1%) entered Hawai'i via 44 out-of-state cruise ships. There were 3,017 visitors who flew into Honolulu to board turnaround trips on two out-of-state cruise ships and another 95,906 visitors (-2.4%) came by air to board the Pride of America.
- In the first nine months of 2019, 95,150 visitors (+11.5%) came to Hawai'i by way of 44 out-of-state cruise ships. There were 2,557 visitors who came by air to board a turnaround trip on an out-of-state cruise ship and another 92,369 visitors (+1.3%) 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.
- 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.
- Norwegian Spirit's 2026 summer itinerary includes a mix of Pacific Ports. The Norwegian Spirit is set to split its time between three regions of the Pacific Ocean during Norwegian Cruise Line's 2026 summer season. As part of what the company calls a guest-centric approach to itinerary planning, the ship will operate sail to the South Pacific, Alaska and Hawai'i. The open-jaw sailings offer embarkation in **Honolulu** or Vancouver and combine destinations in both regions. Named "Fire and Ice" voyages, the 16-night itineraries are set to visit **Kahului, Maui; Hilo, Hawai'i; Nāwiliwili, Kaua'i; and Kailua-Kona**, as well as Ketchikan, Icy Strait Point, Skagway, Sitka and Juneau.

- Port of San Diego to Install New Shore Power Outlet at B Street Cruise Terminal - They are enhancing its environmental sustainability efforts by adding a new shore power outlet for vessels connecting to the electrical grid while at berth. The Port of San Diego's latest investment in shore power supports its Maritime Clean Air Strategy (MCAS) by reducing pollutants like nitrogen oxide and diesel particulate matter and cutting greenhouse gas emissions. This initiative aligns with the Port's goals for a healthier bay and compliance with California's At-Berth Regulation.
- The Port of Seattle has announced its commitment to environmental sustainability by making greenhouse gas (GHG) reduction a key factor in renewing long-term cruise berthing agreements. The Port's Century Agenda and Northwest Ports Clean Air Strategy (NWPCAS) aim to eliminate emissions from all seaport-related sources by 2050, aligning with the International Maritime Organization's (IMO) strategy for net-zero GHG emissions in shipping by 2050. The Port's new policy supports maritime decarbonization, and in June, it became the first U.S. port to mandate that 100 percent of homeported cruise vessels be shore-power capable and use shore power by 2027.
- Cruises are showing to be driving economic impact in Vancouver. The Vancouver Fraser Port Authority has released the findings of a recent economic impact study that each cruise ship injects about \$3 million into the local economy. This includes spending by passengers and crew on food, drink, accommodations and experiences, as well as spending by the cruise lines provisioning, fueling and maintaining their ships. Local spending by passengers, crew and cruise lines amounted to more than \$1.1 billion last year, with the cruise lines spending an estimated \$600 million on local goods and services, according to a statement from the port authority. As the season comes to a close, Vancouver expects that a total of 1.27 million passengers will have passed through the Canada Place cruise terminal. The cruise sector is also reported to be the port's second largest employment generator, directly contributing 9,500 jobs.
- Star Princess was launched at Fincantieri Monfalcone shipyard. The Star Princess will be second-largest ship ever built in Italy and the second LNG-powered cruise ship Fincantieri is building for Princess. Additionally, it is the second dual-fuel ship, primarily powered by LNG, to join the Princess fleet. The ship will be delivered in fall 2025.
- After joining Carnival Cruise Line's fleet in 2022, the Carnival Luminosa is set to debut in a new homeport in San Francisco in 2026.
- The construction of Royal Caribbean International's new Star of the Seas is making progress at the Meyer Turku shipyard in Finland. Part of the company's Icon Class, the 250,800-ton ship is scheduled to enter service in the Caribbean in mid-2025. Following the Star of the Seas, a third yet-unnamed Icon-class ship is set to debut in the spring of 2026. Royal Caribbean recently confirmed its plans to build a fourth ship in the series at the Meyer Turku in Finland. As part of an agreement revealed in late August, the new 5,610-guest ship is set to be delivered in 2027.
- The next ship being built for Viking Cruises will carry the name Viking Mira when it enters service for the brand. Following the Viking Vela, which debuts later this year, and the Viking Vesta, which is set to be delivered in mid-2025, the Mira is set to enter service in 2026. According to the company's website, the new 998-guest luxury vessel will kick off its maiden season in the Western Mediterranean on June 5, 2026.

Distribution by Island

Out-of-state cruise ships Island Visitation	2019	2020*	2021	2022	2023	YTD Sep. 2024P	YTD Sep. 2023	% Change
O'ahu	142,388	30,185	NA	94,343	157,612	106,075	97,234	9.1%
Maui County	125,772	27,222	NA	83,002	96,720	48,265	72,995	-33.9%
Maui	125,679	27,219	NA	83,002	96,393	48,115	72,839	-33.9%
Moloka'i	2,584	519	NA	1,055	2,874	1,608	1,775	-9.4%
Lāna'i	4,546	940	NA	2,310	5,150	2,594	3,360	-22.8%
Kaua'i	90,316	22,642	NA	61,137	90,915	63,578	55,831	13.9%
Hawai'i Island	127,671	27,026	NA	85,697	136,743	88,885	84,111	5.7%

Hawai'i Home-ported ship Island Visitation	2019	2020*	2021	2022	2023	YTD Sep. 2024P	YTD Sep. 2023	% Change
O'ahu	121,981	22,913	NA	52,626	126,331	93,602	95,906	-2.4%
Maui County	121,981	22,913	NA	52,626	119,076	93,602	88,651	5.6%
Maui	121,981	22,913	NA	52,626	119,043	93,602	88,618	5.6%
Moloka'i	987	266	NA	285	868	328	596	-45.0%
Lāna'i	1,069	246	NA	232	848	425	634	-32.9%
Kaua'i	121,981	22,913	NA	52,626	126,331	93,602	95,906	-2.4%
Hawai'i Island	121,981	22,913	NA	52,626	126,331	93,602	95,906	-2.4%

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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First Timers vs. Repeat Visitors

Out-of-State Cruise Ships First Time/Repeat visitors	2019	2020*	2021	2022	2023	YTD Sep. 2024P	YTD Sep. 2023	% Change
First Time Visitors (%)	35.1	34.2	NA	28.4	32.8	36.9	32.2	4.6
Repeat Visitors (%)	64.9	65.8	NA	71.6	67.2	63.1	67.8	-4.6

Hawai'i home-ported ship First Time/Repeat visitors	2019	2020*	2021	2022	2023	YTD Sep. 2024P	YTD Sep. 2023	% Change
First Time Visitors (%)	55.5	55.4	NA	53.0	54.7	55.2	55.6	-0.4
Repeat Visitors (%)	44.5	44.6	NA	47.0	45.3	44.8	44.4	0.4

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