



# Cruise Fact Sheet

## Cruise Overview

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

Spending by visitors who came by out-of-state cruise ships <sup>1</sup> :	\$72.1 million
Arrivals by out-of-state cruise ships:	141,702 visitors
Number of trips from out-of-state cruise ships:	72 trips
Average length of stay:	4.62 days
First time visitors:	36.2%
Repeat visitors:	63.8%

From visitors who came via out-of-state cruise ships	2019	2020*	2021	2022	2023	YTD Oct. 2024P	YTD Oct. 2023	% Change
Visitor Expenditures (\$ Millions)	58.4	11.5	NA	45.5	71.5	72.1	59.6	20.9%
Visitor Days	668,524	142,979	NA	503,605	751,888	655,356	625,746	4.7%
Arrivals	143,508	30,185	NA	95,309	157,612	141,702	131,485	7.8%
Average Daily Census	1,832	1,571	NA	1,380	2,060	2,149	2,058	4.4%
Per Person Per Day Spending* (\$)	87.3	80.6	NA	90.4	95.1	110.0	95.3	15.5%
Per Person Per Trip Spending* (\$)	406.7	382.0	NA	477.7	453.5	508.9	453.5	12.2%
Length of Stay (days)	4.66	4.74	NA	5.28	4.77	4.62	4.76	-2.8%
# of trips Out-of-State cruise ships	68	18	NA	52	74	72	61	18.0%

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 Oct. 2024P	YTD Oct. 2023	% Change
Visitor Days	1,300,196	240,153	NA	551,561	1,298,086	1,058,529	1,085,090	-2.4%
Arrivals	121,981	22,913	NA	52,626	126,331	102,706	105,389	-2.5%
Average Daily Census	3,562	2,639	NA	1,511	3,556	3,471	3,569	-2.8%
Length of Stay (days)	10.66	10.48	NA	10.48	10.28	10.31	10.30	0.1%
Number of inter-island trips	52	10	NA	39	52	43	43	0.0%

\*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.

<sup>1</sup> 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.

## 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 the first 10 months of 2024, 141,702 visitors came to Hawai'i via 72 trips aboard out-of-state cruise ships. There were 3,695 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 102,705 visitors came by air to board the Pride of America.
- For the first 10 months of 2023, 131,485 visitors (+7.8%) entered Hawai'i via 61 trips aboard out-of-state cruise ships. There were 4,161 visitors who flew into Honolulu to board turnaround trips on out-of-state cruise ships. Another 105,390 visitors (-2.5%) came by air to board the Pride of America.
- In the first 10 months of 2019, 115,666 visitors (+22.5%) came to Hawai'i by way of 54 trips by out-of-state cruise ships. There were 5,361 visitors who flew into Honolulu to board turnaround tours on out-of-state cruise ships. Another 101,352 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

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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.
- 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.
- Juneau Port - A major stop for cruise ships sailing in Alaska, Juneau sees calls from vessels of all the major cruise corporations and brands, some of which go to/reposition through Hawai'i after their season is over.
  - The Royal Caribbean Group has signed an agreement with Goldbelt Incorporated to build a cruise port in Juneau. The new port aims to strengthen the infrastructure of the Alaskan town while improving traffic congestion and enhancing the experience for both locals and visitors.
  - There was also a recent 'Ship-Free Saturday' initiative for Juneau, however Juneau residents rejected it - voting against the proposition to ban large cruise ships from docking in the town on Saturdays. According to its supporters, the "Ship-Free Saturday" initiative was aimed at giving Juneau's residents "a respite" from the influx of tourism. Data from

Juneau shows that cruise visitors on Saturdays generated \$30 million in direct spending in 2023, in addition to over \$3.6 million in revenue for the municipal government.

- A record 2024 cruise season concluded in Vancouver. Canada Place marked a record 1.32-million passenger season for the Canadian Port. Vancouver's season ran from March 11th through October 29th, 2024, with 327 calls and a 7 percent increase in guest volume. The busy 2024 cruise season saw Canada Place have six of its top 10 busiest days ever for passengers, including its second busiest ever on April 29 when almost 20,000 passengers passed through the terminal.
- In Seattle, shore power is now available at all cruise berths- This milestone makes Seattle one of the first cruise ports to simultaneously offer this. With this \$44 million investment, all three of the port's cruise berths now support shore power technology, allowing ships to connect to the Seattle City Light grid and turn off fuel-based engines to reduce air emissions.
- Vietnam is planning to build a new \$315 million cruise port on its southern coast, according to reports from local media. The new facility would be in the beach city of Vung Tau, with the capacity to handle some of the world's largest cruise ships. VN Express International said that plans include a pier capable of receiving up to two 228,000-ton vessels, handling roughly 6,000 guests per day. The project also features a range of amenities, including a cruise terminal with shops, offices, hotels, and tourist accommodation.
- Meyer Werft handed over Disney Treasure earlier than contractually agreed and is scheduled to welcome its first guests this December 2024. According to the German shipyard, the Disney Treasure features some of the most complex and innovative entertainment facilities in the cruise industry. The Disney Treasure is the latest ship to join Disney Cruise Line's fleet, and the fifth Disney ship built by Meyer Werft. The third ship in the series, the Disney Destiny, is currently under construction in Papenburg and will be delivered in 2025.
- Norwegian Cruise Line Holdings reported Quarter 3, 2024 results - Below are highlights:
  - Generated record third quarter total revenue of \$2.8 billion, an 11 percent increase compared to the same period in 2023 on 4 percent capacity growth.
  - GAAP net income was \$474.9 million, a 37 percent increase compared to third quarter 2023, with EPS increasing \$0.24, or 34 percent, to \$0.95.
  - Adjusted EBITDA grew 24 percent to \$931.0 million, a quarterly record high, compared to \$752.1 million for the same period of 2023 and above guidance of approximately \$870 million. Adjusted EPS grew \$0.24, or 31 percent, to \$0.99, exceeding guidance of \$0.92.
  - Gross margin per Capacity Day was up 19 percent versus 2023 on an as reported and up 20 percent on a Constant Currency basis.
  - Net Yield growth beat guidance by 260 basis points, increasing over prior year by approximately 8.7 percent on an as reported and 9.0 percent on a Constant Currency basis due to strong demand and pricing across our deployment, particularly in Alaska and Canada-New England, as well as onboard spend.
- Royal Caribbean reported Quarter 3, 2024 earnings, raised guidance - Below are highlights:
  - The load factor in the third quarter was 111 percent.
  - Gross Margin Yields were up 13.4 percent as reported. Net Yields were up 7.9 percent in Constant Currency and as reported.
  - Gross Cruise Costs per Available Passenger Cruise Days ("APCD") increased 1.3 percent as reported. Net Cruise Costs ("NCC"), excluding Fuel, per APCD increased 4.0 percent in Constant-Currency and as-reported.

- Total revenues were \$4.9 billion, Net Income was \$1.1 billion or \$4.21 per share, Adjusted Net Income was \$1.4 billion or \$5.20 per share, and Adjusted EBITDA was \$2.1 billion.
- Royal Caribbean Group has placed all its new cruise ship orders through 2027. Those orders include three more Icon-class ships, one Celebrity newbuild, plus another Oasis-class vessel. In addition are two ships for TUI Cruises, which is part of Royal Caribbean's joint venture with TUI Group.

## Distribution by Island

Out-of-state cruise ships Island Visitation	2019	2020*	2021	2022	2023	YTD Oct. 2024P	YTD Oct. 2023	% Change
O'ahu	142,388	30,185	NA	94,343	157,612	141,702	131,485	7.8%
Maui County	125,772	27,222	NA	83,002	96,720	67,290	84,747	-20.6%
Maui	125,679	27,219	NA	83,002	96,393	67,112	84,479	-20.6%
Molokai	2,584	519	NA	1,055	2,874	2,174	2,409	-9.8%
Lāna'i	4,546	940	NA	2,310	5,150	3,541	4,302	-17.7%
Kauai	90,316	22,642	NA	61,137	90,915	81,643	76,636	6.5%
Hawai'i Island	127,671	27,026	NA	85,697	136,743	112,826	110,617	2.0%

Hawai'i Home-ported ship Island Visitation	2019	2020*	2021	2022	2023	YTD Oct. 2024P	YTD Oct. 2023	% Change
O'ahu	121,981	22,913	NA	52,626	126,331	102,706	105,389	-2.5%
Maui County	121,981	22,913	NA	52,626	119,076	102,706	98,134	4.7%
Maui	121,981	22,913	NA	52,626	119,043	102,706	98,101	4.7%
Molokai	987	266	NA	285	868	364	725	-49.8%
Lāna'i	1,069	246	NA	232	848	498	634	-21.4%
Kauai	121,981	22,913	NA	52,626	126,331	102,706	105,389	-2.5%
Hawai'i Island	121,981	22,913	NA	52,626	126,331	102,706	105,389	-2.5%

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 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 Oct. 2024P	YTD Oct. 2023	% Change
First Time Visitors (%)	35.1	34.2	NA	28.4	32.8	36.2	32.6	3.5
Repeat Visitors (%)	64.9	65.8	NA	71.6	67.2	63.8	67.4	-3.5

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

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