

# Pathways to Recovery Cruise Update

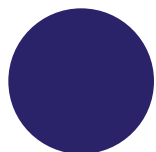
**Shannon McKee**  
President, Access Cruise





# Benefits of Cruise in Hawai'i

Cruise Lines traditionally book their itineraries 1 to 3 years in advance allowing Hawai'i to evaluate and manage the cruise capacity well in advance of FIT arrivals.



## Sampling

Many cruisers are first-timers to Hawai'i. Cruise provides an introduction to Hawai'i through sampling



## Sustainability

There is natural sustainability built into cruise through the existing infrastructure



## Promotion & Ambassadors

Cruise lines promote Hawai'i and are excellent ambassadors



## Small Footprint

Traditionally 30-80% of cruise guests take an organized ship tour. Others will arrange for private tours



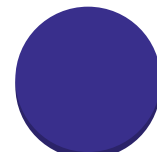
## Primarily Shoulder Season

The high season for the cruise industry in Hawai'i is during spring and fall when tourism is traditionally lower



## Education

Cruise lines help educate their guests on the Hawaiian culture and hire locals for onboard programming



## Supports Local Community

Cruise lines support entrepreneurship and hiring local talent from Hawai'i to provide services



## Distribution

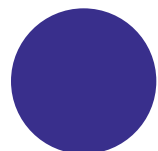
Cruise lines distribute guests among the major Hawaiian Islands



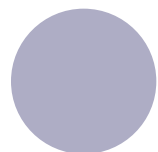
# State of the Cruise Industry



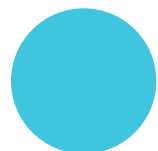
In 2023 the full deployment of the cruise fleet is expected



Good news is that cruise companies have been reporting higher booking volumes



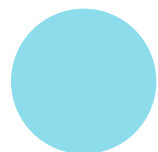
As of September 2023, there are 90+ brands operating 447 ships



The largest source market is the US with the largest sailing region being the Caribbean (38%)



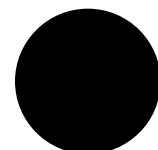
19 new vessels will be delivered in 2023. 68 new cruise ships are on order for deliveries through 2028



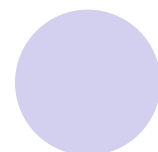
Cruise fleets are newer and offer more features that help drive onboard earnings



Cruising has continued to evolve and there seems to be a ship for every demographic, preference, interest and budget today



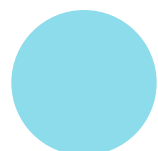
Cruise companies are working diligently to pay down the debt



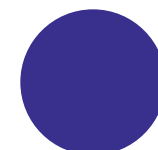
Cruise operators are more focused on cost reductions including itinerary adjustments to minimize fuel consumption



Onboard technology has evolved making the modern cruise fleets more sustainable and greener by reducing fuel consumption



MSC Cruises conducted the first zero net emissions cruise in Europe on the MSC Euribia



Strong market demand combined with product evolution, environmental targets and technology development are setting the course for a bright future



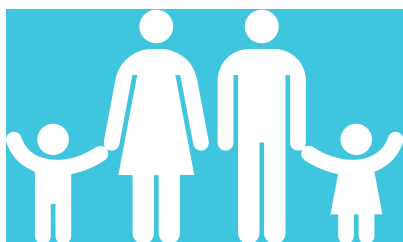
# 2023 Cruise Industry Stats



**447 Ships**



**90+ Cruise Brands  
Sailing to date**



**680,573 Cruise Berths**

(Anticipated in 2023)

**31.16 million passengers**

(maximum capacity)



**68 new vessels**

- 19 Vessels in 2023
- 10 Small / Expedition Vessels
- 37 Using Alternative Fuel Sources



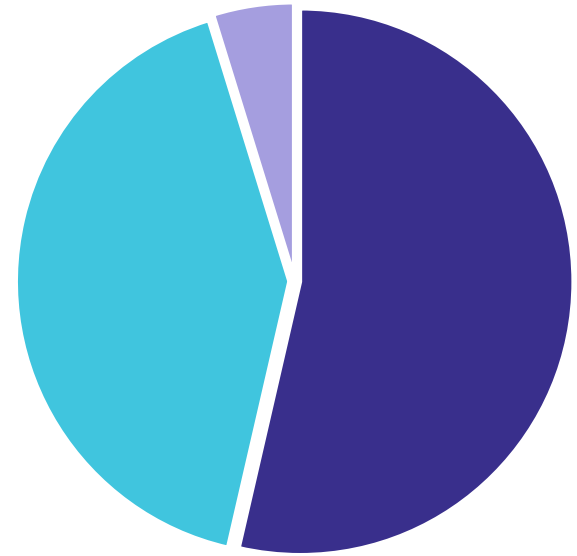
# Sailing Regions

## SAILING REGIONS





# Source of Cruise Brands to Hawai'i



94% of the cruise brands visiting Hawai'i are from North America

## U.S. Capacity vs. World Capacity Hawai'i



## Market Segment in Hawai'i



## Cruise Brands Scheduled 2023



## Cruise Brands Scheduled 2024





# 2023 vs. 2024 Cruise Brands - Maui

2023 Kahului & Lahaina - Maui	
Cruise Line	Est. PAX
	<b>100%</b>
Carnival Cruise Line	8,800
Celebrity Cruises Inc	6,026
Fred Olsen Windcarrier AS	1,825
Holland America Line NV	14,447
Magical Cruise Co Ltd	1,200
NCL Bahamas Ltd	146,668
Oceania Cruises S de RL	824
Princess Cruise Lines Ltd	59,785
Royal Caribbean Cruises Ltd	9,810
Seabourn Cruise Line Ltd	924
Viking Ocean Cruises Ltd	1,888
	<b>252,197</b>

2024 Kahului - Maui	
Cruise Line	Est. PAX
	<b>100%</b>
Carnival Cruise Line	26,803
Fred Olsen Windcarrier AS	1,825
Holland America Line NV	14,970
Integrated Cruise Mgmt Pte Ltd	2,272
NCL Bahamas Ltd	158,240
Phoenix Reisen GmbH	1,200
Princess Cruise Lines Ltd	22,169
Regent Seven Seas Cruises Inc	730
ROW Management Ltd	594
Seabourn Cruise Line Ltd	924
TUI Cruises GmbH	544
Viking Ocean Cruises Ltd	2,832
	<b>233,103</b>



# Hawai'i Cruise Updates

Port	2018	2019	2022	2023	2024
<b>Hilo</b>	220,153	252,986	137,378	262,504	289,203
<b>Honolulu</b>	268,331	286,836	177,811	340,544	361,303
<b>Kona</b>	138,246	176,596	104,549	233,340	249,308
<b>Kahului</b>	127,680	151,724	129,738	166,274	233,103
<b>Lahaina</b>	141,809	115,420	29,956	81,018	0
<b>Kauai</b>	211,419	223,387	133,030	243,067	263,509
<b>Maui Total</b>	269,489	267,144	159,694	247,292	233,103

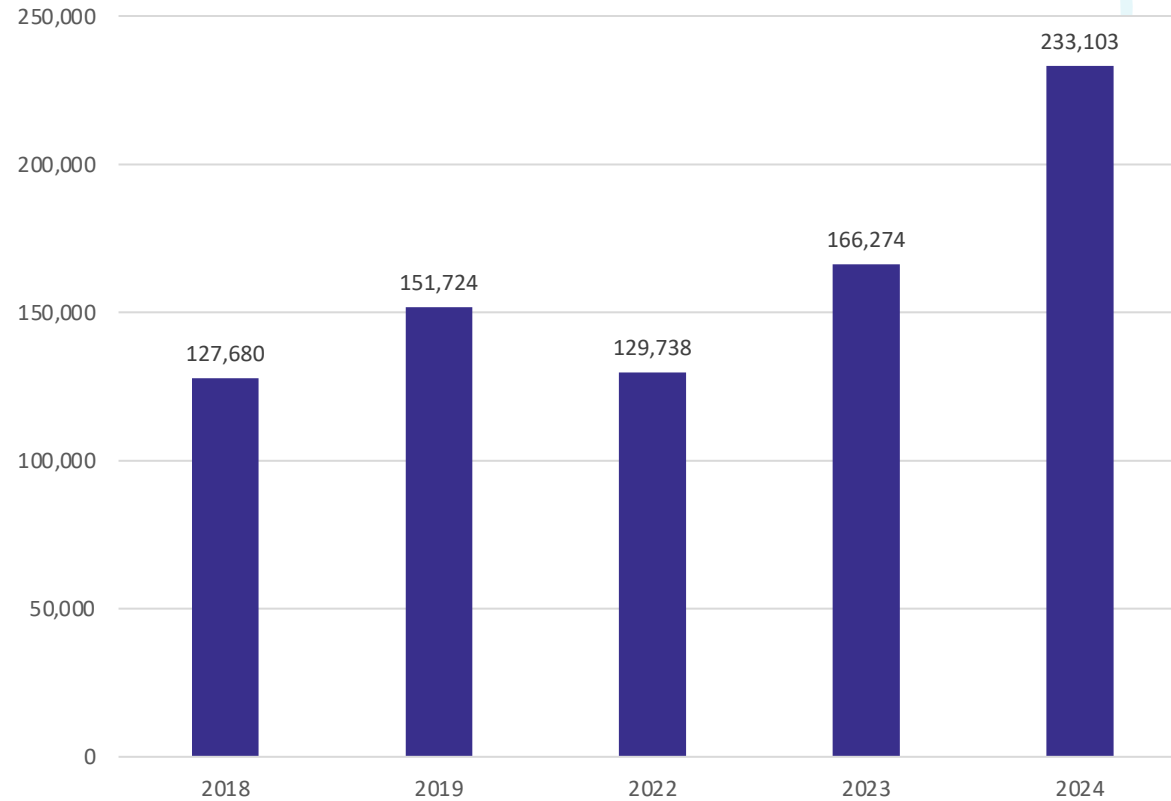
■ Note:

- Data collected from Hawaii.PortCall.com
- Data is estimated based on Hawaii.PortCall.com
- 2022 forecast data calculated at 60% of ship capacity





# Kahului Cruise Passengers & Port Calls

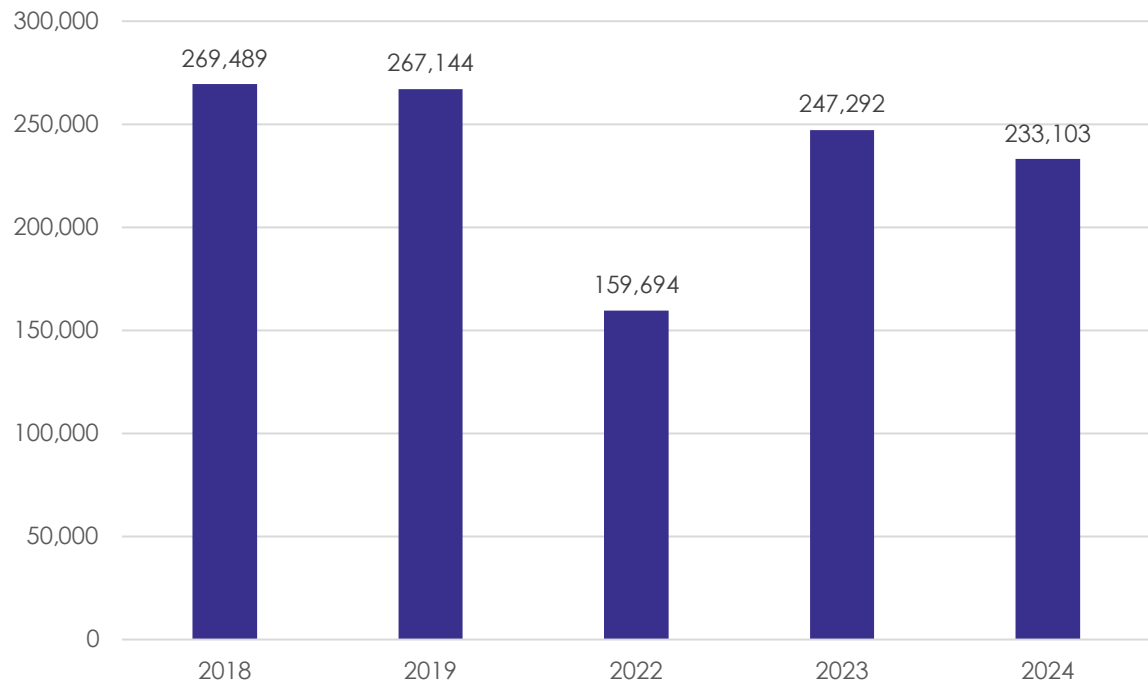


Month	2018	2019	2022	2023	2024
	# of Calls	# of Calls	# of Calls	# of Calls	# of Calls
January	4	6	6	6	11
February	5	3	4	8	11
March	7	5	2	4	5
April	6	5	6	7	9
May	4	5	8	5	6
June	4	5	6	4	7
July	5	4	5	5	4
August	4	4	4	1	4
September	7	5	6	7	7
October	6	9	12	11	16
November	5	6	8	10	11
December	6	8	7	8	10
<b>Total Calls</b>	<b>63</b>	<b>65</b>	<b>74</b>	<b>76</b>	<b>101</b>



# Maui Cruise Passengers & Port Calls – Current

Maui Total



Month	2018	2019	2022	2023	2024
	# of Calls	# of Calls	# of Calls	# of Calls	# of Calls
January	11	10	8	10	11
February	7	7	4	9	11
March	12	7	2	7	5
April	13	13	6	14	10
May	11	8	10	10	9
June	6	6	6	5	7
July	6	4	5	6	4
August	4	4	4	1	4
September	10	8	7	7	7
October	13	15	21	11	19
November	10	13	9	10	11
December	12	12	9	8	10
<b>Total Calls</b>	<b>115</b>	<b>107</b>	<b>91</b>	<b>98</b>	<b>108</b>

■ Note:

- Kahului is unable to absorb all cruise calls from Lahaina resulting in a drop of cruise guests on Maui



# Mauai Cruise Calls - Cancellations

Date	Vessel	Action	Guests	Reason
30-Sep	Celebrity Solstice	Cancels Lahaina	2660 Guests	No space available in Kahlului. Conflict with Norwegian Spirit
3-Oct	Brilliance of the Seas	Cancels Lahaina	2496 Guests	Too Large for Kahului
4-Oct	Royal Princess	Cancels Lahaina	4250 Guests	Barge in Kahului
5-Oct	Coral Princess	Shifts to Kahului	2265 Guests	Kahului Available
7-Oct	Grand Princess	Cancels Lahaina	3006 Guests	No space available in Kahlului. Conflict with Norwegian Spirit
8-Oct	Quantum of the Seas	Cancels Lahaina	4905 Guests	Too large for Kahului
9-Oct	Crown Princess	Cancels Lahaina	3582 Guests	No space available in Kahlului. Conflict with Pride of America
12-Oct	Ovation of the Seas	Cancels Lahaina	4905 Guests	Too large for Kahului
14-Oct	Majestic Princess	Cancels Lahaina	4450 Guests	Too Large for Kahului
15-Oct	Noordam	Cancels Lahaina	2596 Guests	No space available in Kahlului. Conflict with Pride of America
17-Oct	Konningsdam	Cancels Lahaina	3152 Guests	Barge in Kahului
22-Oct	Grand Princess	Cancels Lahaina	3006 Guests	No space available in Kahlului. Conflict with Pride of America
23-Oct	Sapphire Princess	Cancels Lahaina	2988 Guests	No space available in Kahlului. Conflict with Pride of America
30-Oct	Seabourn Odyssey	Cancels Lahaina	462 Guests	No space available in Kahlului. Conflict with Pride of America
13-Nov	Crown Princess	Cancels Lahaina	3582 Guests	No space available in Kahlului. Conflict with Pride of America
4-Dec	Crown Princess	Cancels Lahaina	3582 Guests	No space available in Kahlului. Conflict with Pride of America
9-Dec	Discovery Princess	Cancels Lahaina	3660 Guests	Too Large for Kahului
29-Dec	Crown Princess	Cancels Lahaina	3582 Guests	Barge in Kahului

## Challenges:

- Some international ships are too large for Kahului
- Kahului may be unavailable due to other cruise ships or container vessels

## Opportunity:

- Establish a new tender port for International cruise vessels
  - Potential port could be Mā'alaea Harbor
  - Long process
  - Evaluation of port and weather conditions



# Mālama Hawai'i

## Avenues to pursue Mālama Hawai'i programs

- Water refill stations
- Elimination of harmful sunscreen
- Onboard community events
- Luxury brands want branded experiences

- Incorporation of Mālama programs into specific tour products
  - MC & A
  - PolyAd
  - Hawai'i Tour Consultants

- Educational Programs
- Pier Programs
- Community involvement

- U.S.S. Missouri
- Fishpond
- Maui Ocean Center
- Beach Clean Up

- Modify standardized programs to fit cruise guest profile
  - Maui Ocean Center
  - U.S.S. Missouri

Cruise Brands

Tour Operators

Passengers

Crew

Local Attractions

There are countless ways to accomplish implementing Mālama Hawai'i programs with the cruise industry. It is a matter of collaborating between the cruise brands, tour operators and local community to bring new programs to life. We have worked with Explora Journeys to brand their own experience.



# Mālama Maui

- Donations
- Immediate Return to Maui
- Community Programs – Under Development
  - Creating hands-on giveback programs with multiple cruise lines
    - Corporate level
    - Guests
    - Crew
  - Cruise lines have vast onboard talents that can contribute to community programs





**Mahalo!**

