

THE CHANGING FACE OF THE GLOBAL CRUISE INDUSTRY

ASSOCIATION OF PACIFIC PORTS

JANUARY 15, 2010

HONOLULU, HAWAI'I

Dale Hahn

Dale Hahn Consulting

Destination Characteristics

- Well-known with positive reputation
- Adequate port infrastructure
- Mature, developed visitor infrastructure (attractions, air lift, bus transport, etc.)
- Multiple ports within overnight sailing

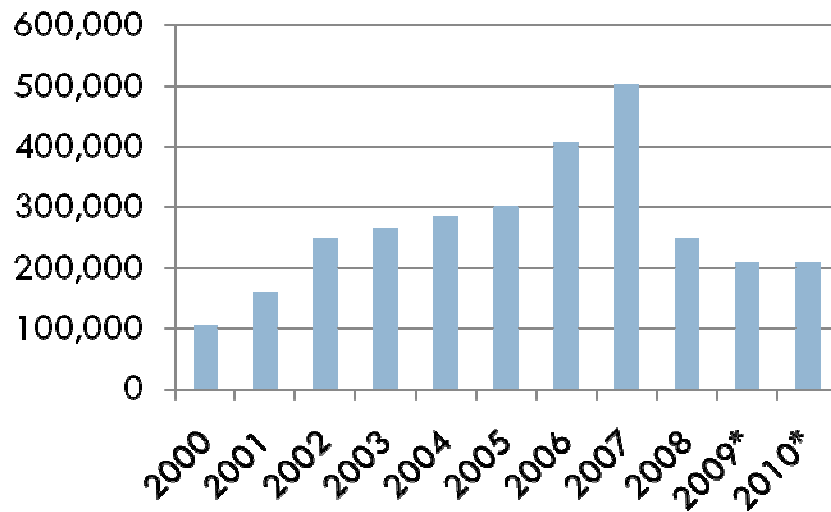
- Geographically isolated
- Distance from source markets

Hawai'i Recent Past Review



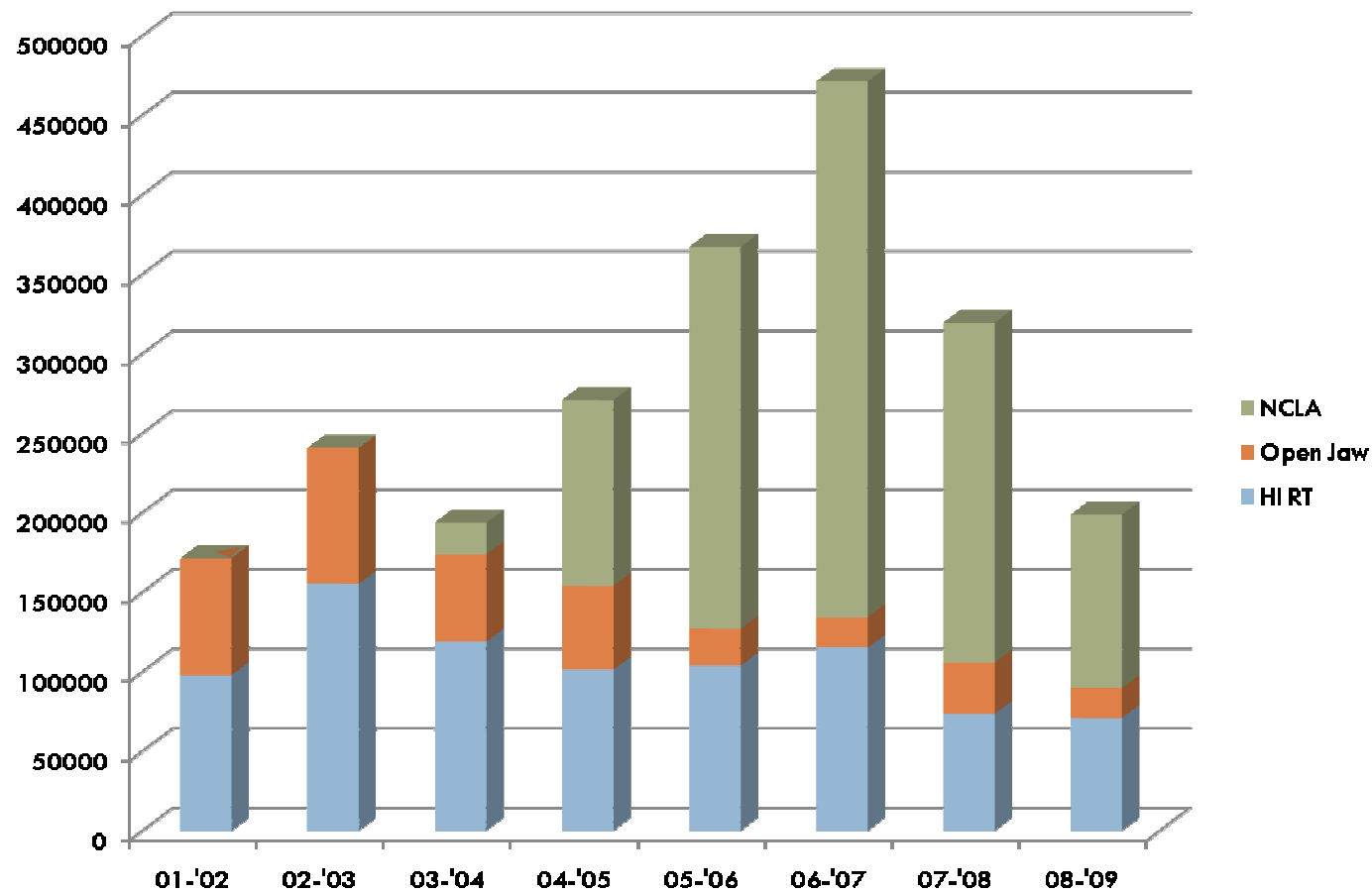
- Capacity Changes
- Market Segment Changes

Highlights of Decade

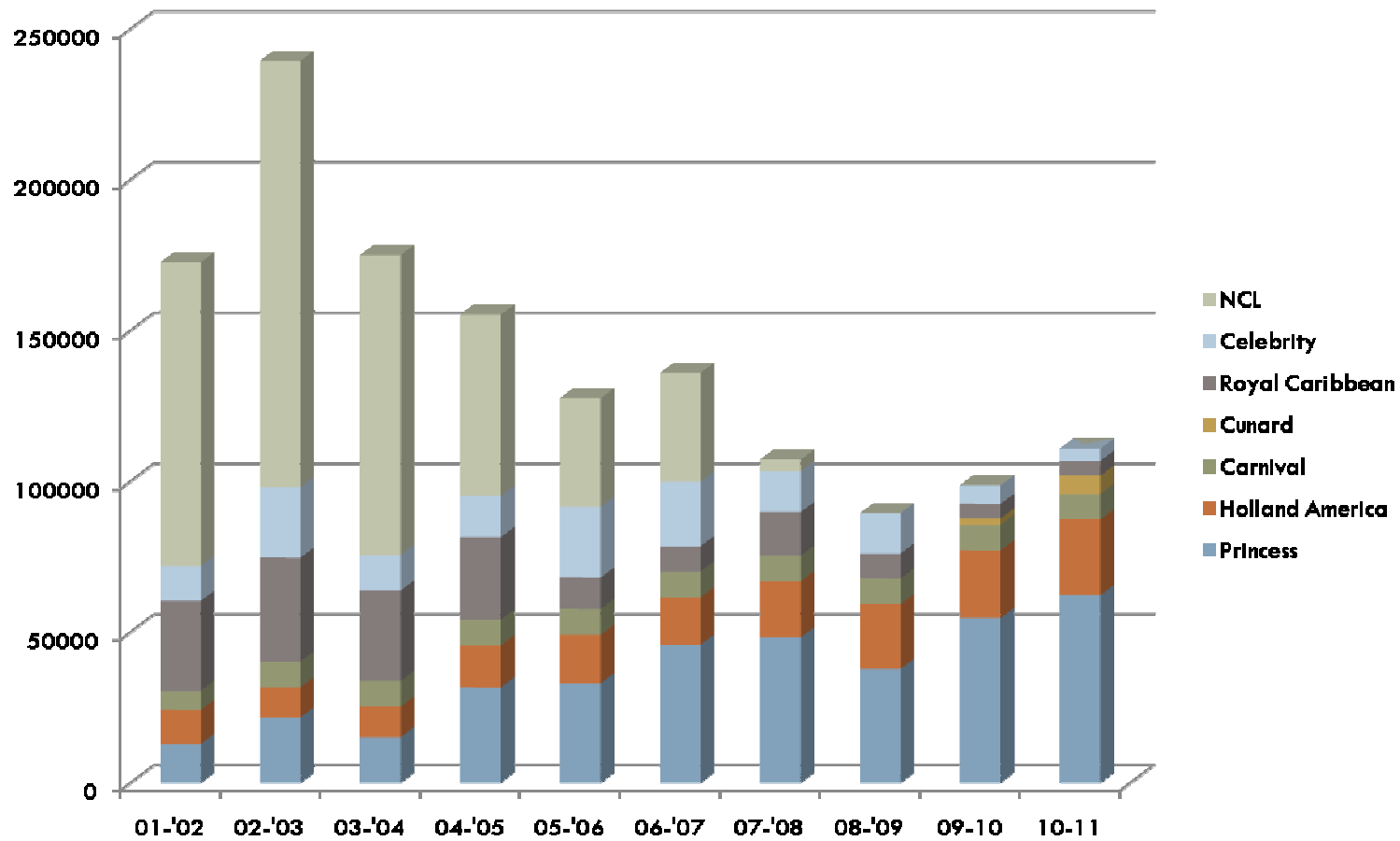


- AMCV (2000-2001)
- NCL N. Star (2002-2004)
- NCLA (2004-2006)
- NCLA, PCL full yr (2007)
- NCLA contraction (2008)

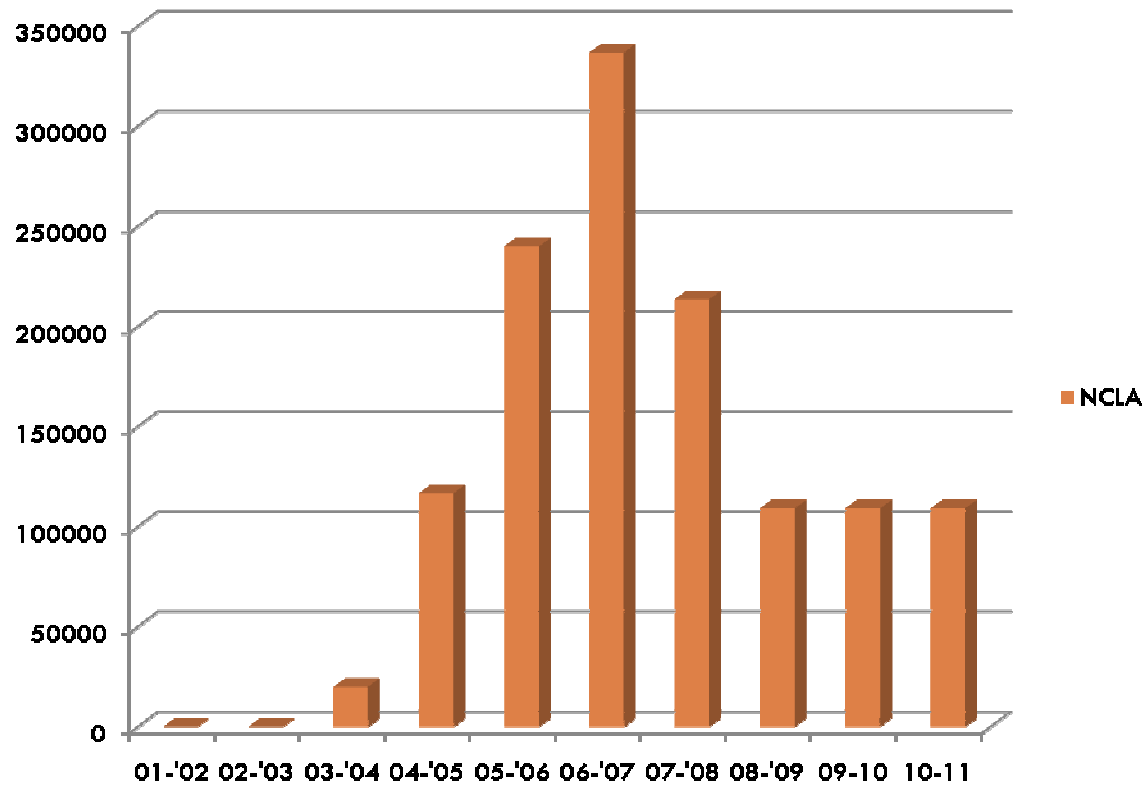
Market Segments



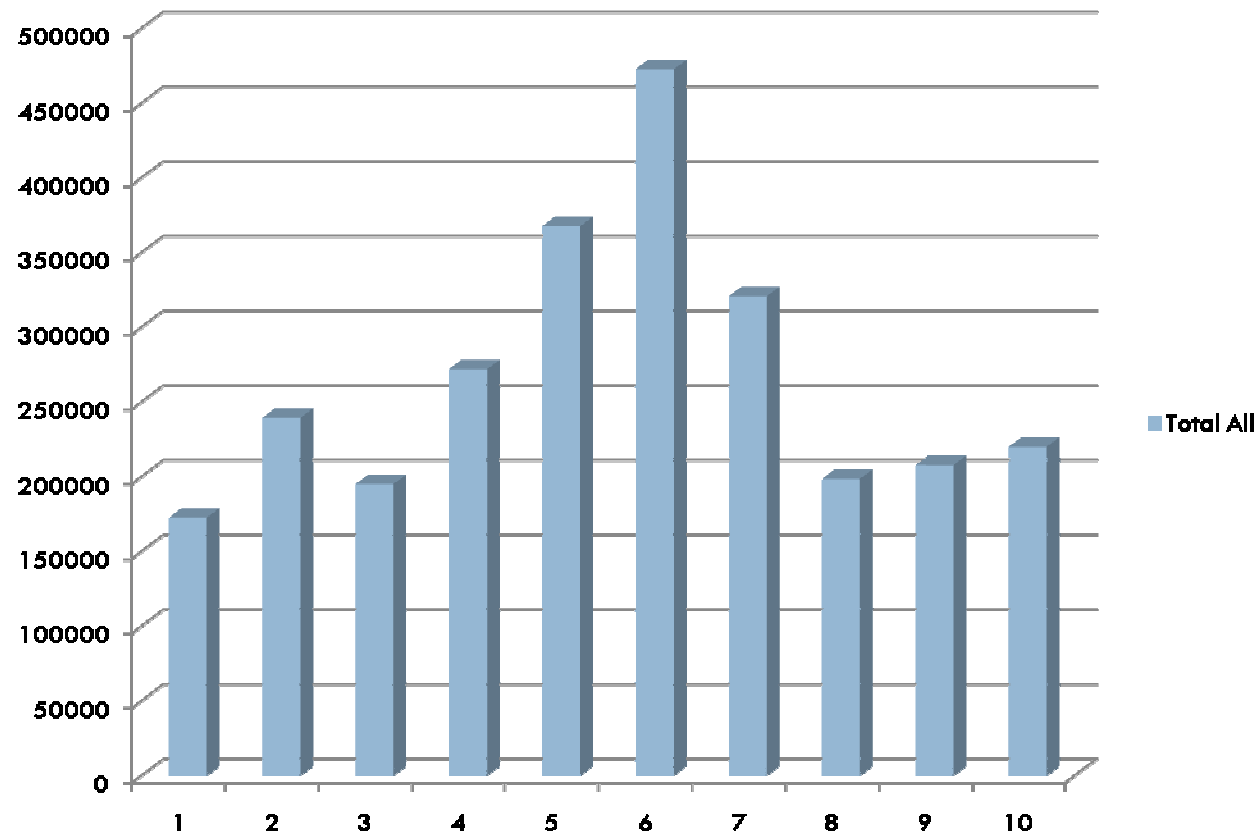
Total Foreign Flag



Total U. S. Flag



Total All Passengers



Some Things to Consider...



- Be aware of market dynamics

Some Things to Consider ...



- Be aware of market dynamics
- **Communicate with the cruise lines on port infrastructure and other issues**

Some Things to Consider ...



- Be aware of market dynamics
- Communicate with the cruise lines on port infrastructure and other issues
- **Anticipate shoreside impacts and work to mitigate them**

Some Things to Consider ...



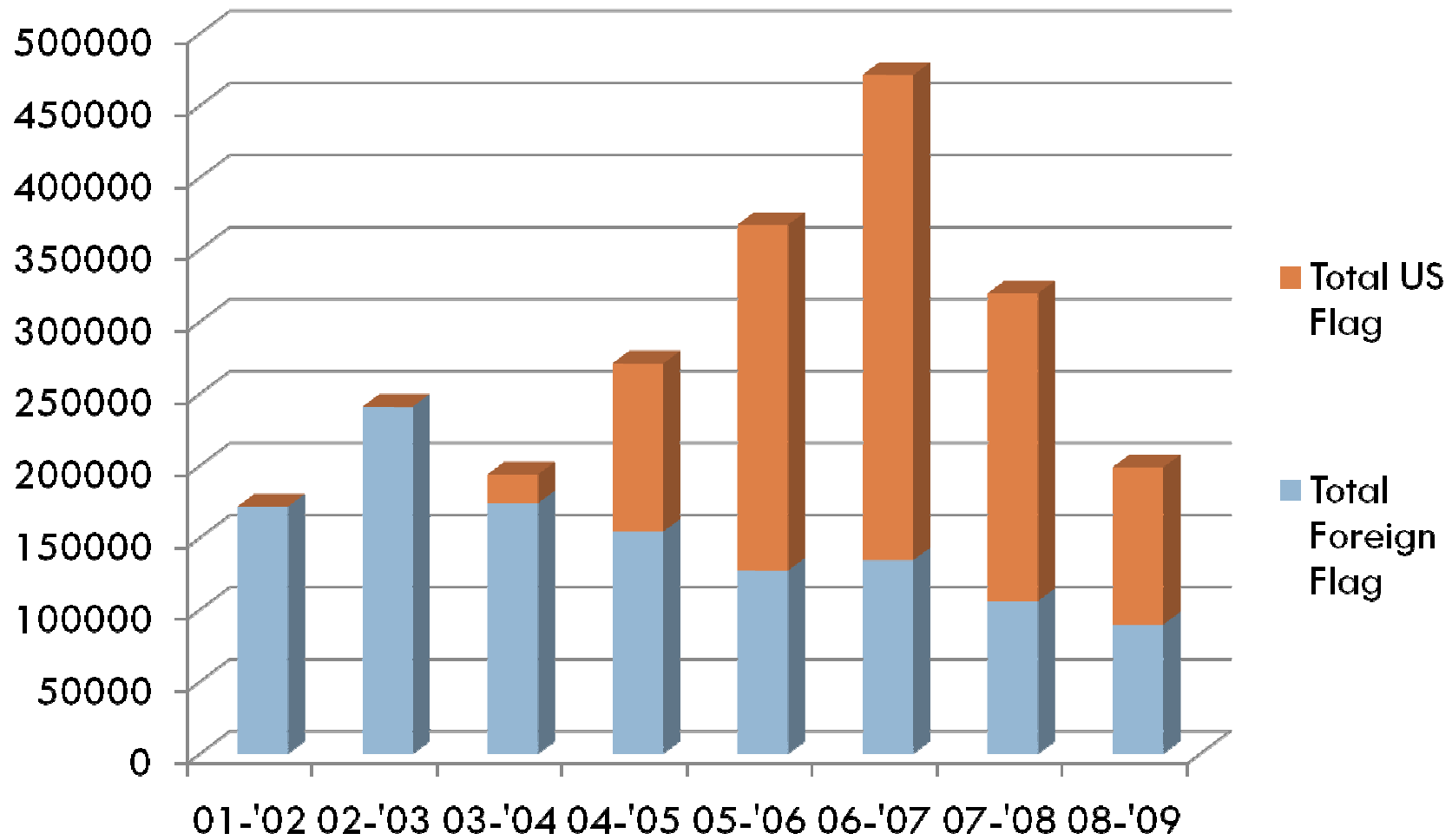
- Be aware of market dynamics
- Communicate with the cruise lines on port infrastructure and other issues
- Anticipate shoreside impacts and work to mitigate them
- **Consider the entire breadth of the industry**



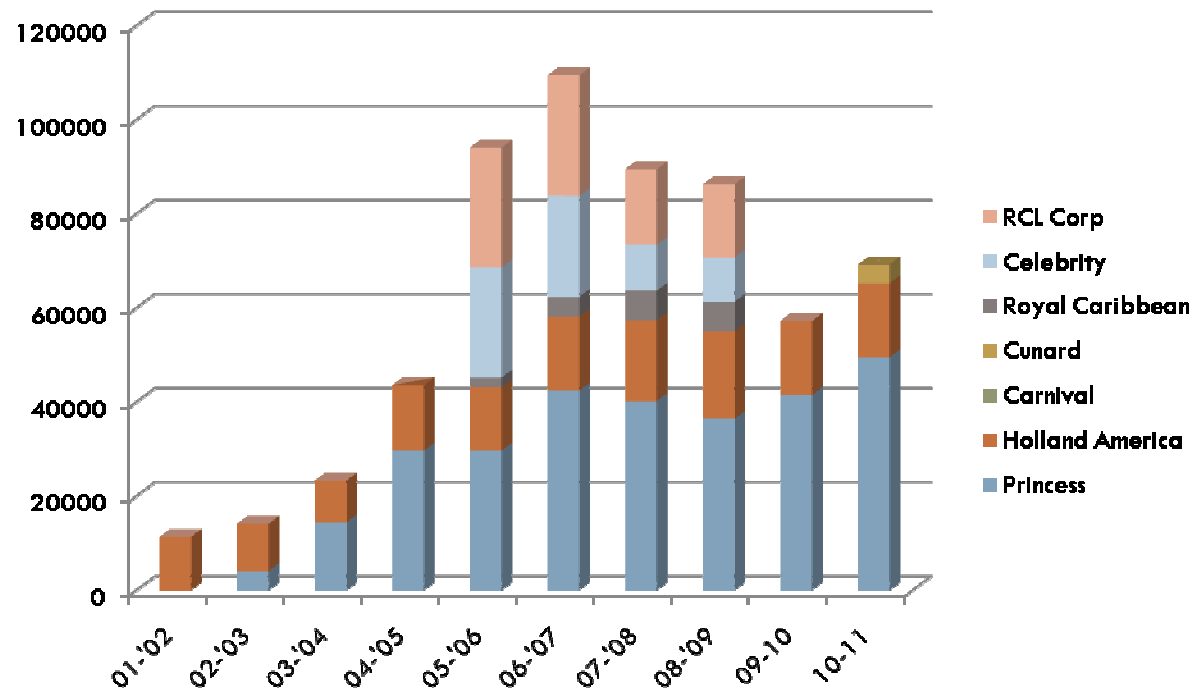
Mahalo!



Hawaii Bed Supply US - Foreign Flag



Foreign Flag Round Trip



Foreign Flag Open Jaw

