



# 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 March 2025 Quick Facts

Spending by visitors who came by out-of-state cruise ships <sup>1</sup> :	\$24.9 million
Arrivals by out-of-state cruise ships:	52,897 visitors
Number of trips from out-of-state cruise ships:	29 trips
Average length of stay:	4.47 days
First time visitors:	37.5%
Repeat visitors:	62.5%

From visitors who came via out-of-state cruise ships	2019	2020*	2021	2022	2023	2024P	YTD Mar. 2025P	YTD Mar. 2024P	% Change
Visitor Expenditures (\$ Millions)	58.4	11.5	NA	45.5	71.5	86.8	24.9	24.8	0.4
Visitor Days	668,524	142,979	NA	503,605	751,888	782,981	236,677	234,035	1.1
Arrivals	143,508	30,185	NA	95,309	157,612	168,035	52,897	49,633	6.6
Average Daily Census	1,832	1,571	NA	1,380	2,060	2,139	2,630	2,572	2.3
Per Person Per Day Spending* (\$)	87.3	80.6	NA	90.4	95.1	110.8	105.0	105.8	-0.8
Per Person Per Trip Spending* (\$)	406.7	382.0	NA	477.7	453.5	516.4	469.9	499.0	-5.8
Length of Stay (days)	4.66	4.74	NA	5.28	4.77	4.66	4.47	4.72	-5.1
# of trips Out-of-State cruise ships	68	18	NA	52	74	87	29	31	-6.5

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.

2024P and 2025P 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	2024P	YTD Mar. 2025P	YTD Mar. 2024P	% Change
Visitor Days	1,300,196	240,153	NA	551,561	1,298,086	1,280,364	320,594	314,428	2.0
Arrivals	121,981	22,913	NA	52,626	126,331	123,676	30,128	30,620	-1.6
Average Daily Census	3,562	2,639	NA	1,511	3,556	3,508	3,562	3,455	3.1
Length of Stay (days)	10.66	10.48	NA	10.48	10.28	10.35	10.64	10.27	3.6
Number of inter-island trips	52	10	NA	39	52	52	13	13	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 the first quarter of 2025, 52,897 visitors came to Hawai'i via 29 trips aboard out-of-state cruise ships and another 30,128 visitors flew to Hawai'i and boarded the *Pride of America*.
- In the first quarter of 2024, 49,633 visitors (+6.6%) came via 31 trips on out-of-state cruise ships and another 30,620 visitors (-1.6%) came by air service and boarded the *Pride of America*.

- In the first quarter of pre-pandemic 2019, 40,172 visitors (+31.7%) came via 21 tours on out-of-state cruise ships and another 30,341 visitors (-0.7%) came by air service and boarded the Pride of America.
- In 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 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 that there were over 34 million people cruising in 2024. The largest source market was the USA with over 50 percent of the marketplace. The largest sailing region was the Caribbean (40.4%) followed by the Mediterranean (15.9%). Hawai'i was approximately 1 percent of cruise capacity. 96 percent of the cruise brands visiting Hawai'i in 2024 were 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.
- Calendar Year 2025 Outlook:
  - WAVE season bookings are off to a record start, with booked load factors in line with prior years and at higher rates.
  - Net Yields are expected to increase 2.5 percent to 4.5 percent in Constant Currency and 1.8 percent to 3.8 percent as reported.
  - NCC, excluding Fuel, per APCD are expected to be flat to up 1.0 percent in Constant Currency and 0.3 percent to 0.7 percent as reported.
  - Adjusted EPS is expected to be in the range of \$14.35 to \$14.65.
- The launch of Celebrity River Cruises - With plans to build 10 River Ships. A premium river cruise vacation that will begin taking bookings this year, was announced by Royal Caribbean Group. The Company has committed to an initial order for 10 transformative ships and plans to sail in 2027.
- A Few Highlights of Continued Growth in Cruise in 2024/2025:
  - Turks and Caicos record - breaking year by welcoming 1,225,255 cruise passengers in 2024, marking a 30.5 percent increase over the previous year. The destination saw 311 ship calls, a 19.2 percent rise from 2023. Cruise arrivals peaked in July with 136,990 passengers, followed by October (110,329 passengers) and August (108,454 passengers). Experience Turks and Caicos strengthened its engagement with travel advisors through training sessions, roadshows and industry events in 2024.
  - Port of New Orleans (NOLA) reported record numbers in 2024- seeing more than 1.2 million cruise passenger movements. Carnival Cruise Line finalized a five-year agreement for two year-round vessels and celebrated its 30th year of cruising from New Orleans. Royal Caribbean returned with the Brilliance of the Seas. Norwegian Cruise Line is continuing with its five-year agreement with the port, adding sailings for the Norwegian Getaway. Port NOLA will also bring port calls to New Orleans in 2025, including P&O's Ventura, a Carnival Corporation subsidiary, and SAGA Cruises' Spirit of Discovery.

- Virgin Voyages celebrates record-breaking start to 2025. The company reported a 60 percent year-over-year increase in revenue and a 40 percent rise in new bookings. Inventory is nearly sold out for the first quarter, with limited availability for the second quarter and high demand for summer 2025 Mediterranean sailings.
- Nassau Port breaks its passenger record in 2024. Nassau Cruise Port (NCP) has announced that it has again broken its annual passenger record, welcoming 5.6 million cruise passengers in 2024. The Port said in a press release that this marks the second consecutive year of record-breaking growth. With plans for further expansion and improvement underway, Nassau Cruise Port said it is positioning itself at the forefront of global cruise tourism.
- Alaska:
  - Carnival brands close Alaska season with environmental contributions. Princess Cruises, Holland America Line and Carnival Cruise Line have made strides in promoting sustainability and reducing their environmental footprint across the destination, Carnival said, including a donation to the Alaska Carbon Reduction Fund.
  - Port of Seattle expecting record year. Over the next two years, three new brands will be sailing out of Seattle: Cunard, MSC and Virgin, according to Linda Springmann, director, cruise and maritime marketing for the Port of Seattle.
  - Holland America invests \$70 million into Denali and Alaska cruise tours to expand guest capacity while elevating the line’s Denali property experience and enhancing its land and sea cruise tours. The company said that the investment will build on Holland America’s position with more glacier viewing opportunities and more ways to see Alaska’s wildlife than any other cruise line. Key highlights of the investment include:
    - 2025: Enhancements to the riverside interpretive trail, improved on-site wayfinding, refined restaurant menu offerings and public space improvements for the Cottonwood and Canyon Lodge guest room buildings.
    - 2026: Forty-eight remodeled rooms in the Holland America Denali Lodge, a new coffee shop, a remodeled Karstens Public House and expanded indoor and outdoor seating.
    - 2027: A new guest room building with 120 suites and standard rooms, and a renovation of main lodge including a new restaurant concept, lobby bar and enhanced coffee experience.

## Distribution by Island

Out-of-state cruise ships Island Visitation	2019	2020*	2021	2022	2023	2024P	YTD Mar. 2025P	YTD Mar. 2024P	% Change
O’ahu	142,388	30,185	NA	94,343	157,612	168,035	52,897	49,633	6.6
Maui County	125,772	27,222	NA	83,002	96,720	83,656	42,332	26,360	60.6
Maui	125,679	27,219	NA	83,002	96,393	83,440	42,254	26,286	60.7
Molokai	2,584	519	NA	1,055	2,874	2,663	1,068	870	22.7
Lāna’i	4,546	940	NA	2,310	5,150	4,469	1,351	1,418	-4.7
Kaua’i	90,316	22,642	NA	61,137	90,915	106,364	46,241	33,522	37.9
Hawai’i Island	127,671	27,026	NA	85,697	136,743	135,462	45,666	43,588	4.8

Hawai’i Home-ported ship Island Visitation	2019	2020*	2021	2022	2023	2024P	YTD Mar. 2025P	YTD Mar. 2024P	% Change
O’ahu	121,981	22,913	NA	52,626	126,331	123,676	30,128	30,620	-1.6
Maui County	121,981	22,913	NA	52,626	119,076	123,676	30,128	30,620	-1.6
Maui	121,981	22,913	NA	52,626	119,043	123,676	30,128	30,620	-1.6
Molokai	987	266	NA	285	868	444	126	124	2.3
Lāna’i	1,069	246	NA	232	848	643	51	241	-79.0
Kaua’i	121,981	22,913	NA	52,626	126,331	123,676	30,128	30,620	-1.6
Hawai’i Island	121,981	22,913	NA	52,626	126,331	123,676	30,128	30,620	-1.6

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## First Timers vs. Repeat Visitors

Out-of-State Cruise Ships First Time/Repeat visitors	2019	2020*	2021	2022	2023	2024P	YTD Mar. 2025P	YTD Mar. 2024P	% Change
First Time Visitors (%)	35.1	34.2	NA	28.4	32.8	34.8	37.5	37.0	0.5
Repeat Visitors (%)	64.9	65.8	NA	71.6	67.2	65.2	62.5	63.0	-0.5

Hawai'i home-ported ship First Time/Repeat visitors	2019	2020*	2021	2022	2023	2024P	YTD Mar. 2025P	YTD Mar. 2024P	% Change
First Time Visitors (%)	55.5	55.4	NA	53.0	54.7	54.9	52.8	53.8	-1.1
Repeat Visitors (%)	44.5	44.6	NA	47.0	45.3	45.1	47.2	46.2	1.1

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