



# 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 May 2025 Quick Facts

|   |                 |
|---|-----------------|
| Spending by visitors who came by out-of-state cruise ships <sup>1</sup> : | \$37.9 million  |
| Arrivals by out-of-state cruise ships:                                    | 80,501 visitors |
| Number of trips from out-of-state cruise ships:                           | 42 trips        |
| Average length of stay:   | 4.52 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 May 2025P | YTD May 2024P | % Change |
|--|---------|---------|------|---------|---------|---------|---------------|---------------|----------|
| Visitor Expenditures (\$ Millions)                   | 58.4    | 11.5    | NA   | 45.5    | 71.5    | 86.8    | 37.9          | 45.0          | -15.7    |
| Visitor Days   | 668,524 | 142,979 | NA   | 503,605 | 751,888 | 782,981 | 363,858       | 421,549       | -13.7    |
| Arrivals   | 143,508 | 30,185  | NA   | 95,309  | 157,612 | 168,035 | 80,501        | 86,748        | -7.2     |
| Average Daily Census                                 | 1,832   | 1,571   | NA   | 1,380   | 2,060   | 2,139   | 2,410         | 2,773         | -13.1    |
| Per Person Per Day Spending* (\$)                    | 87.3    | 80.6    | NA   | 90.4    | 95.1    | 110.8   | 104.3         | 106.8         | -2.4     |
| Per Person Per Trip Spending* (\$)                   | 406.7   | 382.0   | NA   | 477.7   | 453.5   | 516.4   | 471.3         | 518.9         | -9.2     |
| Length of Stay (days)                                | 4.66    | 4.74    | NA   | 5.28    | 4.77    | 4.66    | 4.52          | 4.86          | -7.0     |
| # of trips Out-of-State cruise ships                 | 68      | 18      | NA   | 52      | 74      | 87      | 42            | 48            | -12.5    |

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 May 2025P | YTD May 2024P | % Change |
|--|-----------|---------|------|---------|-----------|-----------|---------------|---------------|----------|
| Visitor Days   | 1,300,196 | 240,153 | NA   | 551,561 | 1,298,086 | 1,280,364 | 424,491       | 505,773       | -16.1    |
| Arrivals   | 121,981   | 22,913  | NA   | 52,626  | 126,331   | 123,676   | 40,254        | 49,371        | -18.5    |
| Average Daily Census   | 3,562     | 2,639   | NA   | 1,511   | 3,556     | 3,508     | 2,811         | 3,327         | -15.5    |
| Length of Stay (days)  | 10.66     | 10.48   | NA   | 10.48   | 10.28     | 10.35     | 10.55         | 10.24         | 2.9      |
| Number of inter-island trips   | 52        | 10      | NA   | 39      | 52        | 52        | 17            | 21            | -19.0    |

\*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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**Hawai'i Tourism Authority:** Jennifer Bastiaanse  
Brand Manager  
Tel: (808) 973-2262  
[jbastiaanse@gohta.net](mailto:jbastiaanse@gohta.net)

**Access Cruise, Inc:** Shannon McKee  
President  
Tel: (305) 582-2095  
[shannon@accesscruiseinc.com](mailto:shannon@accesscruiseinc.com)

## 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 five months of 2025, 80,501 visitors came to Hawai'i via 42 trips aboard out-of-state cruise ships. Another 40,254 visitors flew to Hawai'i and boarded the *Pride of America*.

- In the first five months of 2024, 86,748 visitors came to Hawai'i via 48 trips aboard out-of-state cruise ships. There were 1,858 visitors who flew into Honolulu to board the turnaround trip on an out-of-state cruise ship. A turnaround tour occurs when visitors that arrived on that cruise ship departing by air after touring the islands. After the first group of cruise visitors left, a new group of visitors flew into Honolulu to board that ship, toured the islands, then most of them remained with the ship to visit the next out-of-state port. Another 49,370 visitors came by air to board the Pride of America.
- In the first five months of 2019, 76,298 visitors came to Hawai'i by way of 35 trips from out-of-state cruise ships and 51,620 visitors flew to Hawai'i 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. 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 (Updated Quarterly)**

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### Virgin Voyages

- Virgin Voyages announced record-breaking revenue and bookings to kick off 2025, marking the strongest start in the company's history, with a 34 percent increase in bookings and a 45 percent rise in revenue. The company reported a 60 percent year-over-year increase in revenue and a 40 percent rise in new bookings. Inventory was nearly sold out for the first quarter, with limited availability for second quarter and high demand for summer 2025 Mediterranean sailings.
- Additionally, future bookings for the new Brilliant Lady, which is set to launch in fall 2025, are exceeding expectations, with itineraries from New York, Miami, Los Angeles and Seattle, including Alaska.
- They also reported a more than 50 percent increase in bookings for their new longer itineraries, ranging from eight to 14 nights, reflecting strong demand for extended voyages and new destinations.

### Royal Caribbean

- Royal Caribbean Group posted net earnings of \$730 million for the first quarter of 2025, compared to net income of \$360 million for the first quarter last year. The increase was driven by a combination of higher revenues and lower costs. Royal Caribbean reported \$3.999 billion in ticket and onboard revenue for 2025, compared to \$3.728 billion last year, or \$290.45 and \$283.50 per passenger per day, respectively, for a \$6.95 increase per passenger per day year-over-year. The result of moderately higher revenue and significantly lower costs generated net income of \$53.02 per passenger per day - up from \$27.38 last year.
- Full 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 up to 1.0 percent in Constant Currency and (0.3%) to 0.7 percent as reported. Adjusted EPS is expected to be in the range of \$14.35 to \$14.65.
- Royal Caribbean revealed the name (Legend of the Seas) and itineraries for the next Icon Class Ship. Currently under construction at the Meyer Turku shipyard, the 250,800-ton vessel will debut in the Western Mediterranean in July 2026. The ship will also offer a proven lineup of industry-leading environmental programs, which include an LNG-powered propulsion system.
- Celebrity cruises is set to build 10 river ships: Royal Caribbean announced the launch of Celebrity River Cruises, a premium river cruise vacation that will begin taking bookings this year. The Company has committed to an initial order for 10 transformative ships and plans to sail in 2027.

- As part of new ship announcements, Celebrity ordered a new cruise ship for 2028 delivery and Royal Caribbean Group announced that it has signed an agreement with Chantiers de l'Atlantique for a sixth Edge Series ship for delivery to Celebrity Cruises in 2028. The company said the ship will be a sister to the new Celebrity Xcel, which debuts later this year.

#### Port of San Diego was recognized for environmental excellence

- The Port of San Diego was honored with the Grow Urban Sustainability Award at the Downtown San Diego Partnership's Create the Future Awards on March 13, 2025. The award recognizes the port's leadership in sustainability and environmental stewardship, highlighting its commitment to initiatives that enhance sustainability and expand green spaces in downtown San Diego. The award was presented to Port Chair Danielle Moore, Port of San Diego Board of Port Commissioners, and port staff. The Create the Future Awards recognize individuals, projects and organizations contributing to the city's development.

#### Carnival Brands closed the 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. The company's environmental efforts in the region include a donation to the Alaska Carbon Reduction Fund.

#### Port of Seattle is expecting a record year

- "Over the next two years, we will have three new brands sailing out of Seattle: Cunard, MSC and Virgin," said Linda Springmann, director, cruise and maritime marketing for the Port of Seattle. "We will set new (cruise traffic) records this year and next," she added.
- For 2024, Seattle posted 275 calls and 1.75 million passengers, according to Springmann.

#### Holland America invested \$70 Million into Denali and Alaska cruise tours

Holland America Line has announced a \$70 million capital investment 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 expansion are:

- 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.

#### Nassau Port broke 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.

#### Port Canaveral set a monthly record for cruise guests

- Port Canaveral announced that it has set a new monthly record for most passenger movements. The Florida port hosted 925,994 guests in March 2025, eclipsing the last year's March passenger counts by 16 percent.

#### Disney Destiny hits the water for the first time

- The new Disney Destiny touched the water for the first time at the Meyer Werft shipyard in Papenburg, Germany. Set to be delivered in late 2025, the new Disney Cruise Line ship touched the water for the first time at the facility earlier this week.
- In addition to Disney Wish and Disney Destiny, the series of ships also includes the Disney Treasure, which entered service in Port Canaveral in late 2024.

- As the second new build entering service for Disney Cruise Line in 2025, Disney Adventure is also set to be delivered later this year.

#### First LNG Bunkering of a Cruise Ship in Asia Completed in Singapore

- The first LNG bunkering of a cruise ship in Asia was successfully completed at the Singapore Cruise Centre (SCC) on Monday, February 24, 2025. TotalEnergies Marine Fuels supplied LNG to Silversea's Silver Nova using the bunker vessel the Brassavola, owned by Mitsui O.S.K. Lines and managed by V.Ships. The operation involved months of planning and coordination among multiple stakeholders to ensure compliance with industry safety standards while allowing passenger movements and ship operations to continue uninterrupted.

#### Cruise Industry Trends for 2025 and Beyond

- Focus on Bottom Line: Carnival Corporation is coming off a record financial performance in 2024 and has big expectations for 2025. The same can be said for the other two major cruise companies that are public, Royal Caribbean Group and Norwegian Cruise Line Holdings.
- New Brands Joining the Industry: Expected startups in 2025 include Vidanta, the return of Victory Cruises with a two-ship Great Lakes operation and Alma Cruceros. Later in the year, Four Seasons is expected to take delivery of its first ship ahead of its operational debut in 2026, the same year which will see the start-up of Orient Express with the first of two ultra-luxury sailing ships
- Luxury Market: The luxury market continues to grow the fastest out of all the market niches on a percentage basis. While the ships are smaller, newbuilds from Viking, Explora, Windstar and others are driving growth. The 2026 Luxury Cruise Market is expected to see a 12.6 percent capacity increase and a 9.2 percent increase in ships. Their 2025 report, which provides a comprehensive overview of the latest trends and insights in the luxury market, details market shares for over 40,000 luxury berths and more than 20 brands. Three of those brands make up more than 10 percent market share each. The number of berths in the market in 2026 should be up approximately 11 percent with 95 ships sailing. The Luxury Market Report additionally showcases projected market overviews from 2027 through 2033, with insights revealing a more-than-positive outlook for the market in upcoming years.
- Close to Home: Cruise lines are positioning their ships closer to the industry's number one market: the United States. Homeports with modern infrastructure and either drive-to market potential or airlift connections support the big ships, and all the major brands have their own private islands in the Caribbean, supporting deployment decisions to keep more ships in the Caribbean.
- Larger Newbuilds: Cruise ship newbuilds are getting increasingly larger. Royal Caribbean International, MSC Cruises, TUI Cruises, Princess Cruises and Disney Cruise Line are set to take delivery of some of their largest-ever ships in 2025.

## **Distribution by Island**

| Out-of-state cruise ships<br>Island Visitation | 2019    | 2020*  | 2021 | 2022   | 2023    | 2024P   | YTD May<br>2025P | YTD May<br>2024P | %<br>Change |
|--|---------|--------|------|--------|---------|---------|------------------|------------------|-------------|
| O'ahu  | 142,388 | 30,185 | NA   | 94,343 | 157,612 | 168,035 | 80,501           | 86,748           | -7.2        |
| Maui County                                    | 125,772 | 27,222 | NA   | 83,002 | 96,720  | 83,656  | 58,555           | 38,290           | 52.9        |
| Maui   | 125,679 | 27,219 | NA   | 83,002 | 96,393  | 83,440  | 58,477           | 38,147           | 53.3        |
| Moloka'i                                       | 2,584   | 519    | NA   | 1,055  | 2,874   | 2,663   | 1,542            | 1,409            | 9.4         |
| Lāna'i   | 4,546   | 940    | NA   | 2,310  | 5,150   | 4,469   | 1,885            | 2,252            | -16.3       |
| Kaua'i   | 90,316  | 22,642 | NA   | 61,137 | 90,915  | 106,364 | 61,432           | 53,619           | 14.6        |
| Hawai'i Island                                 | 127,671 | 27,026 | NA   | 85,697 | 136,743 | 135,462 | 70,719           | 73,650           | -4.0        |

| Hawai'i Home-ported ship<br>Island Visitation | 2019    | 2020*  | 2021 | 2022   | 2023    | 2024P   | YTD May<br>2025P | YTD May<br>2024P | %<br>Change |
|---|---------|--------|------|--------|---------|---------|------------------|------------------|-------------|
| O'ahu   | 121,981 | 22,913 | NA   | 52,626 | 126,331 | 123,676 | 40,254           | 49,371           | -18.5       |
| Maui County                                   | 121,981 | 22,913 | NA   | 52,626 | 119,076 | 123,676 | 40,254           | 49,371           | -18.5       |
| Maui  | 121,981 | 22,913 | NA   | 52,626 | 119,043 | 123,676 | 40,254           | 49,371           | -18.5       |
| Moloka'i                                      | 987     | 266    | NA   | 285    | 868     | 444     | 150              | 180              | -16.7       |
| Lāna'i  | 1,069   | 246    | NA   | 232    | 848     | 643     | 75               | 282              | -73.6       |
| Kaua'i  | 121,981 | 22,913 | NA   | 52,626 | 126,331 | 123,676 | 40,254           | 49,371           | -18.5       |
| Hawai'i Island                                | 121,981 | 22,913 | NA   | 52,626 | 126,331 | 123,676 | 40,254           | 49,371           | -18.5       |

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

## First Timers vs. Repeat Visitors

| Out-of-State Cruise Ships<br>First Time/Repeat visitors | 2019 | 2020* | 2021 | 2022 | 2023 | 2024P | YTD May<br>2025P | YTD May<br>2024P | %<br>Change |
|---|------|-------|------|------|------|-------|------------------|------------------|-------------|
| First Time Visitors (%)                                 | 35.1 | 34.2  | NA   | 28.4 | 32.8 | 34.8  | 37.5             | 36.6             | 0.9         |
| Repeat Visitors (%)                                     | 64.9 | 65.8  | NA   | 71.6 | 67.2 | 65.2  | 62.5             | 63.4             | -0.9        |

| Hawai'i home-ported ship<br>First Time/Repeat visitors | 2019 | 2020* | 2021 | 2022 | 2023 | 2024P | YTD May<br>2025P | YTD May<br>2024P | %<br>Change |
|--|------|-------|------|------|------|-------|------------------|------------------|-------------|
| First Time Visitors (%)                                | 55.5 | 55.4  | NA   | 53.0 | 54.7 | 54.9  | 54.7             | 56.0             | -1.3        |
| Repeat Visitors (%)                                    | 44.5 | 44.6  | NA   | 47.0 | 45.3 | 45.1  | 45.3             | 44.0             | 1.3         |

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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