



Cruise Fact Sheet

Cruise Overview

Access Cruise, Inc., a Miami-based boutique sales and marketing group, is currently contracted to provide consultation services to HTA. For the cruise industry in Hawai'i, there is a focus to maintain, strengthen, and thoughtfully diversify a sustainable cruise market that aligns with community values, environmental stewardship, and long-term destination health. A key element is in developing and nurturing strong partnerships between cruise lines, ports and local stakeholders, and being a conduit in helping local businesses have greater access to the cruise lines, to help them thrive locally in this space.

North America continues to be the primary source market for cruises to the Hawaiian Islands. Norwegian Cruise Line remains the largest capacity provider in the market through the Pride of America, which is deployed from Honolulu. As the only U.S.-flagged vessel homeported in Hawai'i, Pride of America operates year-round, 7-day inter-island sailings, offering a uniquely immersive Hawaiian experience without international port calls.

The balance of Hawai'i's cruise capacity continues to be generated by international itineraries operated by brands such as Princess Cruises, Holland America Line, Carnival Cruise Line, Royal Caribbean and Celebrity Cruises tend to sail to and from Hawai'i from international destinations. Overall, North American cruise brands represent approximately 96% of the brands visiting Hawai'i.

Year-to-Date February 2026 Quick Facts

Spending by visitors who came by out-of-state cruise ships ¹ :	\$19.5 million
Arrivals by out-of-state cruise ships:	41,899 visitors
Number of trips from out-of-state cruise ships:	23 trips
Average length of stay:	4.63 days
First time visitors:	30.9%
Repeat visitors:	69.1%

From visitors who came via out-of-state cruise ships	2020*	2021	2022	2023	2024	2025P	YTD Feb. 2026P	YTD Feb. 2025P	% Change
Visitor Expenditures (\$ Millions)	11.5	NA	45.5	71.5	89.3	72.4	19.5	18.3	6.5
Visitor Days	142,979	NA	503,605	751,888	792,836	696,612	194,135	174,442	11.3
Arrivals	30,185	NA	95,309	157,612	168,123	149,778	41,899	39,015	7.4
Average Daily Census	1,571	NA	1,380	2,060	2,166	1,909	3,290	2,957	11.3
Per Person Per Day Spending* (\$)	80.6	NA	90.4	95.1	112.6	103.9	100.6	105.1	-4.3
Per Person Per Trip Spending* (\$)	382.0	NA	477.7	453.5	531.2	483.1	466.0	470.0	-0.9
Length of Stay (days)	4.74	NA	5.28	4.77	4.72	4.65	4.63	4.47	3.6
# of trips Out-of-State cruise ships	18	NA	52	74	87	79	23	21	9.5

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.

2025P and 2026P visitor data are preliminary. 2020 – 2024 visitor data are the final numbers and reflect updated data from ship agents and from Portcall.com.

¹ 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.

From visitors who came by air to board the Hawai'i home-ported ship*	2020*	2021	2022	2023	2024	2025P	YTD Feb. 2026P	YTD Feb. 2025P	% Change
Visitor Days	240,153	NA	551,561	1,298,086	1,280,364	1,157,458	195,911	192,933	1.5
Arrivals	22,913	NA	52,626	126,331	123,676	110,417	18,115	18,381	-1.4
Average Daily Census	2,639	NA	1,511	3,556	3,498	3,171	3,321	3,270	1.5
Length of Stay (days)	10.48	NA	10.48	10.28	10.35	10.48	10.81	10.50	3.0
Number of inter-island trips	10	NA	39	52	52	47	8	8	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.

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Market Summary

- 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 2024, 168,123 visitors came to Hawai'i via 87 trips aboard out-of-state cruise ships. There were 5,541 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 2025, 149,778 visitors came via 79 trips by out-of-state cruise ships. There were 6,756 visitors who flew to Honolulu to board turnaround trips. 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 110,417 visitors flew to Hawai'i and boarded the Pride of America. The Pride of America was out of service and dry-docked for all of May through the first week of June 2025 for maintenance and refurbishing.
- In the first two months of 2025, 39,015 visitors came to Hawai'i via 21 trips aboard out-of-state cruise ships and 18,381 visitors flew to Hawai'i and boarded the Pride of America.
- In the first two months of 2026, 41,899 visitors (+7.4% compared to year-to-date February 2025) came to Hawai'i via 23 trips aboard out-of-state cruise ships. There were 628 visitors who flew to the state to board a turnaround trip. A turnaround trip occurs when cruise passengers arrive by ship, tour the islands, and then depart by air. When they leave, a new group of visitors have flown into the state to board that ship, tour the islands, and then most of them will continue onboard the ship to complete their trip in a different out-of-state port. Another 18,115 visitors (-1.4% compared to year-to-date February 2025) flew to Hawai'i and boarded the Pride of America.

Market Conditions (Updated Quarterly)

Hawai'i - Related Updates

- HDOT Energy Security and Waste Reduction Plan - The final plan by the HDOT was released on October 15, 2025, and is currently available for viewing, through an online search by the name of the plan. This plan requests specific emissions reductions by the cruise industry, and thus potentially impacts cruise tourism within the Hawai'i market.
- HTA submitted feedback on the plan during the public comment period that ended on August 31, 2025, from a tourism perspective while collectively supporting the needs of the state as well as the cruise lines that visit Hawai'i, and the local businesses that would potentially be impacted if any reduction in cruise calls and passengers were to occur as a result.
- Now that the final report has been issued by the HDOT, it has been revised with key updates of, but not limited to, a modification of the emission requirement thresholds (an increase in reduction % required, as well as a change in how the emissions data is measured), but the plan is no longer requiring a reduction of calls, nor a passenger cap into Hawai'i's ports as long as the emissions requirements are met. HTA will continue to work closely with the HDOT and all stakeholders to help achieve emissions reductions for the state while striving to help reduce any negative impacts to cruise tourism and local operators as much as we are able to within HTA's capacity.
- Taxation Update – Due to pending results of court appeal (As obtained from the Hawai'i Department of Taxation website)
 - Act 96 – Which imposes the TAT on cruise ship operators' gross rental proceeds derived from cruise fares, prorated by the ratio of days docked in any port in the State to the total number of days of the voyage.
 - The United States Court of Appeals for the Ninth Circuit enjoined enforcement of the portions of Act 96 that relate and apply to cruise ships in an order issued on December 31, 2025, and clarified on January 2, 2026. See Cruise Lines Int'l Ass'n, Inc. v. Suganuma, Nos. 25-8057, 25-8058 (9th Cir.).

- Accordingly, and until further notice, the Department of Taxation (DOTAX) will refrain from enforcing Act 96 as it relates and applies to cruise ships. All other provisions in Act 96, including the increase in the TAT rate from 10.25 percent to 11 percent, shall be effective as of January 1, 2026.
 - County Surcharges - Additionally, effective January 1, 2026, and until further notice, DOTAX will suspend enforcement of sections 18-237-210-01 and 18-237-210-02, HAR.
 - Section 18-237-210-01, HAR, specifies the amount of gross income derived from cruise fares that shall be apportioned to the State for purposes of the GET in accordance with section 237-21, Hawaii Revised Statutes (HRS). Section 18-237-210-02, HAR, specifies the amount of gross income derived from cruise fares that shall be allocated to each county for purposes of the county surcharge on GET in accordance with section 237-8.6, HRS.
- Disney Cruise Line's, the Disney Wonder, has a last scheduled cruise in Hawai'i in early 2026. They recently announced changing their scheduling within the Oceania and Hawai'i markets.
- Princess Cruises unveiled its 2027-28 West Coast season collection - From September 2027 through April 2028, eight Princess ships will sail 69 departures across 15 itineraries to Mexico, Hawai'i and the California Coast, with voyages ranging from four to 16 days.
 - Princess Cruises season pertaining to Hawai'i:
- Cruising offered on the Crown Princess, Emerald Princess and Ruby Princess.
- Sailings providing eight destinations, including four Hawaiian Islands.
- Extended getaways offerings from 18 departures across two 16-day itineraries, and late evenings in Honolulu and Kona on select voyages.
- Providing convenient departures roundtrip sailings from Los Angeles or San Francisco.
- Featuring cultural and natural experiences from volcanic landscapes to island traditions.
- Onboard experiences include the Aloha Spirit program in Hawai'i, featuring hula lessons and lei-making, as well as food-and-wine experiences inspired by the California Coast.

Cruise Line Industry Updates

- Data from Cruise Industry News' global cruise ship orderbook shows that nearly 65 percent of new ocean vessels on order for 2026 will be powered by alternative fuels.
- According to the latest update of the report, 14 cruise ships are expected to be delivered next year, of which nine will be able to run on fuels other than traditional diesel-derived fuels.
- The lineup is highlighted by a series of LNG-powered ships, which include Royal Caribbean's new Legend of the Seas.
 - As the third vessel in the company's Icon class series, the 5,610-guest ship will become one of the largest in the world.
 - Other LNG-fueled ships set to enter service in 2026 include TUI Cruises' Mein Schiff Flow, MSC's World Asia, the Explora III, the Magellan Discoverer and the Four Seasons I.
- The latest update of *Cruise Industry News*' global cruise ship orderbook shows that 14 new vessels are set to enter service in 2026.
- As of early December 2025, the global cruise ship orderbook includes 72 ships with deliveries through 2036. Valued at over \$70 billion, the vessels will add nearly 200,000 berths to the industry.
- Tahiti Continues to attract new ships - they have reported that they have had just over 1,000 cruise calls in 2025.
 - However, significant growth is planned to continue throughout the decade. French Polynesia has already registered 1,240+ calls for 2026, a new record.
 - They have over 25 international cruise brands operating in its waters annually and handle approximately 200 turnaround operations in Tahiti, mainly with ships of less than 300 passengers.

- In addition to Tahiti, French Polynesia comprises of 30 islands and atolls, spread over five different archipelagoes.
- They also have a new international cruise terminal.

Other Cruise Line Updates

- American Cruise Line
 - American Cruise Lines celebrated a record-breaking year in 2025, the company announced in a press release.
 - In addition to welcoming two new coastal vessels to its fleet, the company won over 20 awards during the year.
 - American Cruise Line has announced 10 new ships through 2028 for the U.S. market, beginning with the American Pioneer, which debuted in Florida in November.
 - The American Pioneer is the second new Patriot Class ship the company has launched this year. The balance of the order will be delivered over the next three years.
 - The company said in a press release that all of its new ships will continue to sail domestically, operating itineraries across its growing portfolio, including the Mississippi River, Alaska and the East Coast, including the Florida Coast and Keys.
 - The new ships will also accelerate their expansion into new niche markets such as the Great Lakes, the Arkansas River and National Parks cruises.
- Royal Caribbean
 - Construction has begun on Royal Caribbean's seventh Oasis-class ship. This yet-to-be-named vessel is scheduled to be delivered by the French shipyard in 2028.
 - Celebrity Cruises takes delivery of Celebrity Xcel and announced the name of its sixth Edge Series ship, the Celebrity Xcite. The Celebrity Xcite is expected to set sail in 2028. "Celebrity Xcel represents the next bold step in our journey to transform the way the world experiences premium travel," said Royal Caribbean Group President and CEO Jason Liberty.
- Disney Cruise Line
 - Disney Cruise Line took delivery of the new Disney Adventure from shipbuilder Meyer Werft on December 16, 2025.
 - "The Disney Adventure is now one step closer to calling Singapore home," the company stated, noting that the ship's maiden cruise is scheduled for March 2026.
 - As the first Disney ship dedicated to Asia, the 208,000-ton vessel is set to offer short sailings out of the Marina Bay Cruise Centre in Singapore.
 - With the delivery of the Adventure, Disney welcomed two ships to its fleet in 2025, including Disney Destiny.

Port-Related News

- Port of Seattle wraps up record \$1.2 billion cruise season, which saw over 1.9 million guests and 298 calls. According to a press release, the record-breaking season also delivered an estimated \$1.2 billion in regional economic benefit while providing more than 5,120 individuals with direct and indirect jobs throughout the season. Fourteen different vessels homeported out of Seattle, representing eight cruise brands.
- Environmentally, the season was also highlighted by advancements in sustainability, with a record 65 percent of ships utilizing shore power at berth. Other highlights included the port's support of Carnival Corporation in the first biofuel demonstration project in the Seattle cruise market, testing biofuel bunkering on three Holland America Line sailings.
- 2025 cruise season delivers billion-dollar lift to Vancouver's economy. The Vancouver Fraser Port Authority announced that the Canada Place cruise terminal has welcomed over 300 cruise ships and more than 1 million passengers in 2025, supporting tourism and businesses locally and nationally. The

final cruise ship of the 2025 season departed on October 21, 2025, marking the end of the cruise season. The cruise terminal at the Port of Vancouver welcomed 301 cruise ship visits and 1.2 million passengers between March 5 and October 21, 2025.

- Stockholm sees strong cruise season and shore power now in port. Ports of Stockholm have announced that the traditional cruise season in Stockholm is coming to an end and that the year has seen a clear upturn, with more calls compared to last year. During the season, Sweden's second shore power system for cruise ships was inaugurated in Stockholm. According to a statement, this is an investment that strengthens Stockholm as a year-round, sustainable, premium destination.

Distribution by Island

Out-of-state cruise ships Island Visitation	2020*	2021	2022	2023	2024	2025P	YTD Feb. 2026P	YTD Feb. 2025P	% Change
O'ahu	30,185	NA	94,343	157,612	168,123	149,778	40,158	39,015	2.9
Maui County	27,222	NA	83,002	96,720	83,133	108,706	36,940	29,175	26.6
Maui	27,219	NA	83,002	96,393	82,929	108,565	36,920	29,098	26.9
Moloka'i	519	NA	1,055	2,874	2,748	2,760	584	814	-28.3
Lāna'i	940	NA	2,310	5,150	4,353	3,445	785	1,017	-22.9
Kaua'i	22,642	NA	61,137	90,915	106,131	110,541	32,770	32,678	0.3
Hawai'i Island	27,026	NA	85,697	136,743	135,948	126,812	40,183	32,547	23.5

Hawai'i Home-ported ship Island Visitation	2020*	2021	2022	2023	2024	2025P	YTD Feb. 2026P	YTD Feb. 2025P	% Change
O'ahu	22,913	NA	52,626	126,331	123,676	110,417	18,115	18,381	-1.4
Maui County	22,913	NA	52,626	119,076	123,676	110,417	18,115	18,381	-1.4
Maui	22,913	NA	52,626	119,043	123,676	110,417	18,115	18,381	-1.4
Moloka'i	266	NA	285	868	444	594	49	126	-61.0
Lāna'i	246	NA	232	848	643	812	83	26	NA
Kaua'i	22,913	NA	52,626	126,331	123,676	110,417	18,115	18,381	-1.4
Hawai'i Island	22,913	NA	52,626	126,331	123,676	110,417	18,115	18,381	-1.4

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.

2025P and 2026P visitor data are preliminary. 2020 – 2024 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	2020*	2021	2022	2023	2024	2025P	YTD Feb. 2026P	YTD Feb. 2025P	% Change
First Time Visitors (%)	34.2	NA	28.4	32.8	35.4	36.2	30.9	38.7	-7.8
Repeat Visitors (%)	65.8	NA	71.6	67.2	64.6	63.8	69.1	61.3	7.8

Hawai'i home-ported ship First Time/Repeat visitors	2020*	2021	2022	2023	2024	2025P	YTD Feb. 2026P	YTD Feb. 2025P	% Change
First Time Visitors (%)	55.4	NA	53.0	54.7	54.9	52.7	50.5	51.6	-1.1
Repeat Visitors (%)	44.6	NA	47.0	45.3	45.1	47.3	49.5	48.4	1.1

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.

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Cruise Visitor Satisfaction (Quarterly Updates)

From DBEDT's 2025 Cruise Survey, the following are annual 2025 visitor satisfaction data collected from visitors aboard out-of-state cruise ships and from visitors aboard the Pride of America. Going forward, 2026 cruise visitor satisfaction data will be updated quarterly.

2025 Cruise visitors by Markets:

	US West	US East	Japan	Canada	Europe	Oceania	Other Asia	Latin America
Aboard Out-of-State Cruise Ships	58,381	63,291	107	18,358	8,238	1,754	165	269
Aboard the Pride of America	21,201	74,725	679	5,671	1,477	4,313	300	1,031

Satisfaction – State of Hawai‘i by Visitor Market:

Out-of-State Cruise Ships	US West	US East	Japan	Canada	Europe	Oceania	Other Asia	Latin America
Excellent (ratings of 7 and 8, 8-point scale)	75.5%	76.8%	72.5%	73.1%	67.5%	62.8%	56.7%	71.3%

Question: Overall, how would you rate this current trip to Hawai‘i?

Hawai‘i home-ported ship	US West	US East	Japan	Canada	Europe	Oceania	Other Asia	Latin America
Excellent (ratings of 7 and 8, 8-point scale)	74.3%	80.9%	59.7%	80.0%	79.0%	79.5%	38.1%	70.1%

Question: Overall, how would you rate this current trip to Hawai‘i?

Satisfaction – Hawai‘i Trip Expectations:

Out-of-State Cruise Ships	US West	US East	Japan	Canada	Europe	Oceania	Other Asia	Latin America
Exceeded Expectations	18.6%	27.1%	66.9%	18.6%	28.2%	20.7%	0.0%	15.7%
Met Expectations	73.3%	62.9%	33.1%	74.6%	60.7%	71.1%	88.8%	68.4%

Question: Would you say this trip to Hawai‘i ___?

Hawai‘i home-ported ship	US West	US East	Japan	Canada	Europe	Oceania	Other Asia	Latin America
Exceeded Expectations	25.1%	30.3%	9.6%	26.4%	41.2%	21.0%	9.4%	44.9%
Met Expectations	64.6%	63.5%	76.4%	70.3%	55.0%	69.3%	77.2%	48.8%

Question: Would you say this trip to Hawai‘i...

Brand/Destination - Advocacy:

Out-of-State Cruise Ships	US West	US East	Japan	Canada	Europe	Oceania	Other Asia	Latin America
Very Likely	76.4%	72.4%	92.2%	66.8%	57.8%	57.1%	66.3%	24.9%
Somewhat Likely	20.4%	23.0%	7.8%	26.0%	30.8%	40.1%	30.1%	60.7%

Question: How likely are you to recommend Hawai‘i as a vacation place to your friends and relatives?

Hawai‘i home-ported ship	US West	US East	Japan	Canada	Europe	Oceania	Other Asia	Latin America
Very Likely	75.8%	77.8%	48.2%	72.4%	76.6%	61.5%	27.7%	79.2%
Somewhat Likely	19.6%	19.6%	51.8%	24.8%	17.9%	33.3%	72.3%	13.7%

Question: How likely are you to recommend Hawai‘i as a vacation place to your friends and relatives?

Likelihood of Return Visit:

Out-of-State Cruise Ships	US West	US East	Japan	Canada	Europe	Oceania	Other Asia	Latin America
Very Likely	52.4%	30.7%	92.2%	33.6%	16.7%	30.1%	46.9%	12.8%
Somewhat Likely	28.6%	35.9%	7.8%	33.7%	35.1%	30.1%	38.4%	23.3%

Question: How likely are you to return to visit Hawai‘i in the next five years?

Hawai‘i home-ported ship	US West	US East	Japan	Canada	Europe	Oceania	Other Asia	Latin America
Very Likely	36.7%	18.5%	52.4%	12.5%	20.7%	16.4%	22.9%	36.5%
Somewhat Likely	31.2%	31.2%	22.4%	32.1%	36.1%	33.7%	44.4%	32.1%

Question: How likely are you to return to visit Hawai‘i in the next five years?