



# Cruise Fact Sheet

## Cruise Overview

Hawai'i's cruise industry is focused on maintaining, strengthening, and thoughtfully diversifying a sustainable cruise market that reflects community values, environmental stewardship, and the long-term health of the destination. Central to this effort is fostering strong partnerships among cruise lines, ports, and local stakeholders.

North America remains the primary source market for cruises to the Hawaiian Islands. Norwegian Cruise Line is the market's largest capacity provider through Pride of America, the only U.S.-flagged vessel homeported in Hawai'i. Operating year-round from Honolulu, the ship offers seven-day interisland itineraries. The remainder of Hawai'i's cruise capacity is driven largely by international itineraries operated by brands such as Princess Cruises, Holland America Line, Carnival Cruise Line, Royal Caribbean, and Celebrity Cruises. Overall, North American cruise brands account for approximately 96% of cruise lines visiting the Hawaiian Islands.

## Year-to-Date May 2026 Quick Facts

Spending by visitors who came by out-of-state cruise ships <sup>1</sup> :	\$39.5 million
Arrivals by out-of-state cruise ships:	93,904 visitors
Number of trips from out-of-state cruise ships:	47 trips
Average length of stay:	4.13 days
First time visitors:	32.7%
Repeat visitors:	67.3%

From visitors who came via out-of-state cruise ships	2020*	2021	2022	2023	2024	2025P	YTD May 2026P	YTD May 2025P	% Change
Visitor Expenditures (\$ Millions)	11.5	NA	45.5	71.5	89.3	72.4	39.5	37.9	4.1
Visitor Days	142,979	NA	503,605	751,888	792,836	696,612	387,571	363,858	6.5
Arrivals	30,185	NA	95,309	157,612	168,123	149,778	93,904	80,501	16.7
Average Daily Census	1,571	NA	1,380	2,060	2,166	1,909	2,567	2,410	6.5
Per Person Per Day Spending* (\$)	80.6	NA	90.4	95.1	112.6	103.9	101.9	104.3	-2.3
Per Person Per Trip Spending* (\$)	382.0	NA	477.7	453.5	531.2	483.1	420.5	471.3	-10.8
Length of Stay (days)	4.74	NA	5.28	4.77	4.72	4.65	4.13	4.52	-8.7
# of trips Out-of-State cruise ships	18	NA	52	74	87	79	47	42	11.9

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.

<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.

From visitors who came by air to board the Hawai'i home-ported ship*	2020*	2021	2022	2023	2024	2025P	YTD May 2026P	YTD May 2025P	% Change
Visitor Days	240,153	NA	551,561	1,298,086	1,280,364	1,157,458	528,077	424,491	24.4
Arrivals	22,913	NA	52,626	126,331	123,676	110,417	49,963	40,254	24.1
Average Daily Census	2,639	NA	1,511	3,556	3,498	3,171	4,401	2,811	56.5
Length of Stay (days)	10.48	NA	10.48	10.28	10.35	10.48	10.57	10.55	0.2
Number of inter-island trips	10	NA	39	52	52	47	22	17	29.4

\*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.

## Contact Information

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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.. 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 five months of 2026, 93,904 visitors (+16.7% compared to the first five months of 2025) came to Hawai'i via 47 trips aboard out-of-state cruise ships. There were 2,587 visitors who flew to the state to board a turnaround trip. Another 68,713 visitors (+70.7% compared to the first five months of 2025) flew to Hawai'i and boarded the *Pride of America*.

## **Market Conditions (Updated Quarterly)**

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- Global cruise passenger volume reached 37.2 million in 2025, with the Cruise Lines International Association (CLIA) projecting 39.6 million passengers in 2026, continuing a steep upward trend from 34.6 million passengers in 2024.
- North America remains the largest market (36.8% share in 2025), followed by Europe and Asia Pacific. (Source: Fortune Business Insights).
- Europe is growing steadily, with revenue expected to rise from USD \$24.84 billion in 2025 to USD \$27.11 billion in 2026. (Source: Fortune Business Insights)
- Asia Pacific is also expanding, from USD \$16.23 billion in 2025 to USD \$18.04 billion in 2026.
- Ocean cruises dominate, projected to account for 64.2 percent of the market in 2026 (Source: Fortune Business Insights)
- The 40–60 years age group holds the largest share (46%) in 2026. (Source: Fortune Business Insights)
- On June 21, 2026, all U.S. citizens potentially exposed to hantavirus aboard the M/V *Hondius* cruise ship finished their 42-day monitoring period. No cases of hantavirus disease occurred in the United States as a result of this outbreak. (Source: [Centers for Disease Control and Prevention](#))
- Port of Montreal launched its 2026 cruise season with the arrival of *Victory I*, expecting nearly 50,000 passengers across 39 operations through October 31, with luxury cruise calls up more than 220 percent since 2019.
- Norwegian Cruise Line returned to Philadelphia after a 15-year absence, launching a season of Bermuda and Canada/New England cruises aboard the *Norwegian Jewel* and reestablishing the city as a cruise departure port for Mid-Atlantic travelers.
- Princess Cruises ordered three new LNG-powered, 183,000-ton ships from Fincantieri for delivery in 2035, 2038, and 2039, each carrying approximately 4,700 guests as part of Carnival Corporation's fleet expansion strategy.
- Asian cruise destinations are experiencing strong growth, with Hong Kong, Korea, the Philippines, Xiamen, and Shanghai highlighting new cruise experiences, port developments, and rising passenger volumes, including Korea's projection of more than 1.8 million cruise passengers in 2026.
- The global cruise industry is projected to grow over 20 percent from 2026 to 2036, reaching an estimated 50 million passengers, supported by 78 new ocean ships worth approximately \$80 billion and significant fleet expansion from major cruise brands.

## Distribution by Island

Out-of-state cruise ships Island Visitation	2020*	2021	2022	2023	2024	2025P	YTD May 2026P	YTD May 2025P	% Change
O'ahu	30,185	NA	94,343	157,612	168,123	149,778	90,462	80,501	12.4
Maui County	27,222	NA	83,002	96,720	83,133	108,706	66,293	58,555	13.2
Maui	27,219	NA	83,002	96,393	82,929	108,565	66,212	58,477	13.2
Moloka'i	519	NA	1,055	2,874	2,748	2,760	1,333	1,542	-13.5
Lāna'i	940	NA	2,310	5,150	4,353	3,445	1,815	1,885	-3.7
Kaua'i	22,642	NA	61,137	90,915	106,131	110,541	60,013	61,432	-2.3
Hawai'i Island	27,026	NA	85,697	136,743	135,948	126,812	72,357	70,719	2.3

Hawai'i Home-ported ship Island Visitation	2020*	2021	2022	2023	2024	2025P	YTD May 2026P	YTD May 2025P	% Change
O'ahu	22,913	NA	52,626	126,331	123,676	110,417	49,963	40,254	24.1
Maui County	22,913	NA	52,626	119,076	123,676	110,417	49,963	40,254	24.1
Maui	22,913	NA	52,626	119,043	123,676	110,417	49,963	40,254	24.1
Moloka'i	266	NA	285	868	444	594	93	150	-37.8
Lāna'i	246	NA	232	848	643	812	227	75	204.2
Kaua'i	22,913	NA	52,626	126,331	123,676	110,417	49,963	40,254	24.1
Hawai'i Island	22,913	NA	52,626	126,331	123,676	110,417	49,963	40,254	24.1

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## First Timers vs. Repeat Visitors

Out-of-State Cruise Ships First Time/Repeat visitors	2020*	2021	2022	2023	2024	2025P	YTD May 2026P	YTD May 2025P	% Change
First Time Visitors (%)	34.2	NA	28.4	32.8	35.4	36.2	32.7	37.5	-4.8
Repeat Visitors (%)	65.8	NA	71.6	67.2	64.6	63.8	67.3	62.5	4.8

Hawai'i home-ported ship First Time/Repeat visitors	2020*	2021	2022	2023	2024	2025P	YTD May 2026P	YTD May 2025P	% Change
First Time Visitors (%)	55.4	NA	53.0	54.7	54.9	52.7	52.8	54.7	-2.0
Repeat Visitors (%)	44.6	NA	47.0	45.3	45.1	47.3	47.2	45.3	2.0

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