



# Economic Contribution of Cruise Tourism to the United States 2022

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December 2023



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## December 2023

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# EXECUTIVE SUMMARY



## THE CRUISE INDUSTRY IN 2022

The cruise industry is a large and rapidly growing segment within world tourism. Cruise Lines International Association (CLIA) recently commissioned Oxford Economics to assess the economic contribution of cruise tourism to the United States in 2022.

Previous research published by CLIA indicates that, prior to the coronavirus pandemic, the sector generated \$154.5 billion in global economic output and supported 1.2 million jobs in 2019. The pandemic brought cruise activity to an almost complete stop in 2020 as international restrictions on travel prohibited cruises.<sup>1</sup>

2021 was a year of rebirth for the cruise industry as pandemic restrictions were lifted and the resumption of operations accelerated through the year. 2022 was a year of solid performance as covid-19 related restrictions were fully lifted and operations accelerated through the year. Over the year capacity almost doubled from 350,000 lower berths in January to 605,000 lower berths in December.

Throughout 2022, cruise activity grew significantly, reducing the gap with the record-setting 2019 performance. In this report, we examine how the various activities of the cruise sector in 2022 supported economic impacts in the US.

## How does the Cruise Industry Generate Economic Impact?

We assess the economic contribution of cruise tourism to the United States using a standard approach known as an economic impact analysis that quantifies the impact of the cruise industry across three “core” channels.



### DIRECT IMPACT

The first channel—**direct**—relates to the economic activity supported by expenditures directly linked to the cruise industry. This includes passenger spending, cruise line operational and capital purchases, and wage-linked consumption by cruise line employees. Additionally, we quantify direct cruise line employment and associated wages within this study where appropriate.



### INDIRECT IMPACT

The second channel—**indirect**—captures supply chain effects that follow on from direct impacts, for example, purchases by businesses of goods and services from other businesses.



### INDUCED IMPACT

The final channel—**induced**—captures the income effect and flow on to household consumption.

## KEY FINDINGS FOR THE UNITED STATES

The restart of cruise in 2022 yielded significant economic benefits to the United States. Cruise line-linked spending totalled \$21.6 billion in 2022 in the US, primarily consisting of cruise line operational spending and passenger spending. This spending supported substantial broader economic benefits, including:



**\$50.3 bn**

worth of total economic output



**\$27.7 bn**

worth of gross domestic product (GDP)



**229,000**

total jobs



**\$17.2 bn**

worth of wages

<sup>1</sup> Restrictions on cruises were in place from March 2020.

**Fig. 1. Summary of cruise industry activity in the United States, 2022**

	Direct Expenditure	Direct Cruise Line Employment	Indirect	Induced	Total
Output (\$ bn)	21.3	-	14.3	14.8	50.3
GDP (\$ bn)	11.1	-	8.2	8.5	27.7
Employment (000s)	98	19	49	63	229
Wages (\$ bn)	6.2	1.6	4.6	4.8	17.2

Source: Oxford Economics.

**State Results**

Ten key US states that benefitted from cruise related activities in 2022 are listed below in terms of the industry's impact on economic output, GDP, and employment.

**Fig. 2. Summary of cruise industry activity in the United States by state, 2022**

	Total Output (\$ bn)	Total GDP (\$ bn)	Total Employment (000s)
1 Florida	18.3	10.1	106
2 California	5.8	3.3	19
3 Texas	4.5	2.3	17
4 Washington	2.8	1.7	12
5 New York	1.9	1.1	5
6 Alaska	1.6	1.0	10
7 New Jersey	1.3	0.8	5
8 Louisiana	1.3	0.6	6
9 Georgia	0.9	0.5	3
10 Pennsylvania	0.7	0.4	2
<i>Rest of United States</i>	<i>11.3</i>	<i>6.0</i>	<i>42</i>
<b>United States</b>	<b>50.3</b>	<b>27.7</b>	<b>229</b>

Source: Oxford Economics.



Spending by the Cruise Industry in 2022 supported **\$50.3 billion** in Economic Output and almost **229,000 jobs.**

# INTRODUCTION



# INTRODUCTION

The cruise industry is a rapidly growing segment within world tourism. In recent decades, demand for travel overall has increased significantly across the globe due to rising standards of living, changes in consumer behaviour and improved access to transport, among other factors. This growth has benefitted many tourism sectors, including the cruise industry. Cruise Lines International Association (CLIA) recently commissioned Oxford Economics to assess the economic contribution of cruise activity in the United States in 2022.

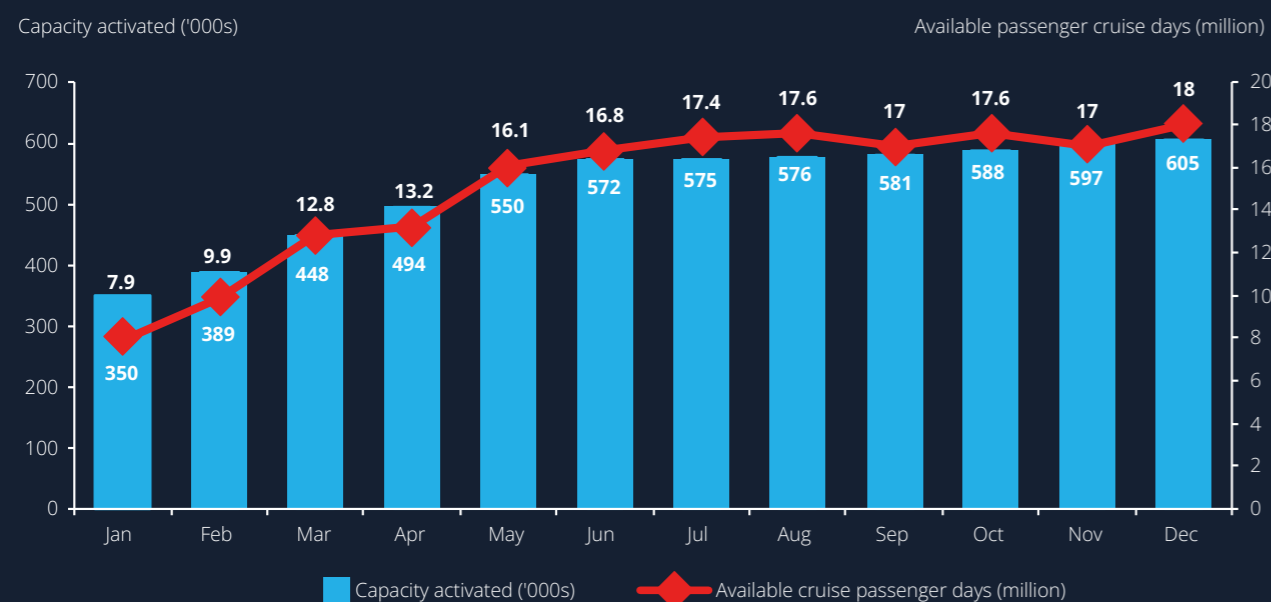
Previous research published by CLIA indicates that, prior to the coronavirus pandemic, the sector generated \$154.5 billion in global economic output and supported 1.2 million jobs in 2019. The pandemic brought cruise activity to an almost complete stop in 2020 as international restrictions on travel prohibited cruises.

2022 was a year of solid performance as covid-19 related restrictions were fully lifted and operations accelerated through the year. Over the year capacity almost doubled from 350,000 lower berths in January to 605,000 lower berths in December. Throughout 2022, cruise activity grew significantly, reducing the gap with the record-setting 2019 performance.

The United States is the largest cruise market in the world with about 58% of global cruise passengers and home to eight of the top twenty ports in the world in 2022. Ports in the United States primarily service cruise destinations such as the Caribbean, Alaska and British Columbia, and Canada's New England or West Coast itineraries. As a result, close to 50% of worldwide cruise passengers embark and disembark on their cruise from US based ports. Furthermore, Alaska is one of the top cruise destinations and home to three of the top ten ports worldwide in terms of transit activity.

Besides high passenger activity, some of the largest cruise operators in the world have their headquarters in Florida, Washington State and California. These further contribute to economic activity in the country, and as a result the US is one of the countries that benefits the most from the world cruise industry.

**Fig. 3. Global cruise industry restart in 2022**



Source: Oxford Economics/Tourism Economics, Cruise-IP

## An Overview of Economic Impact Analysis

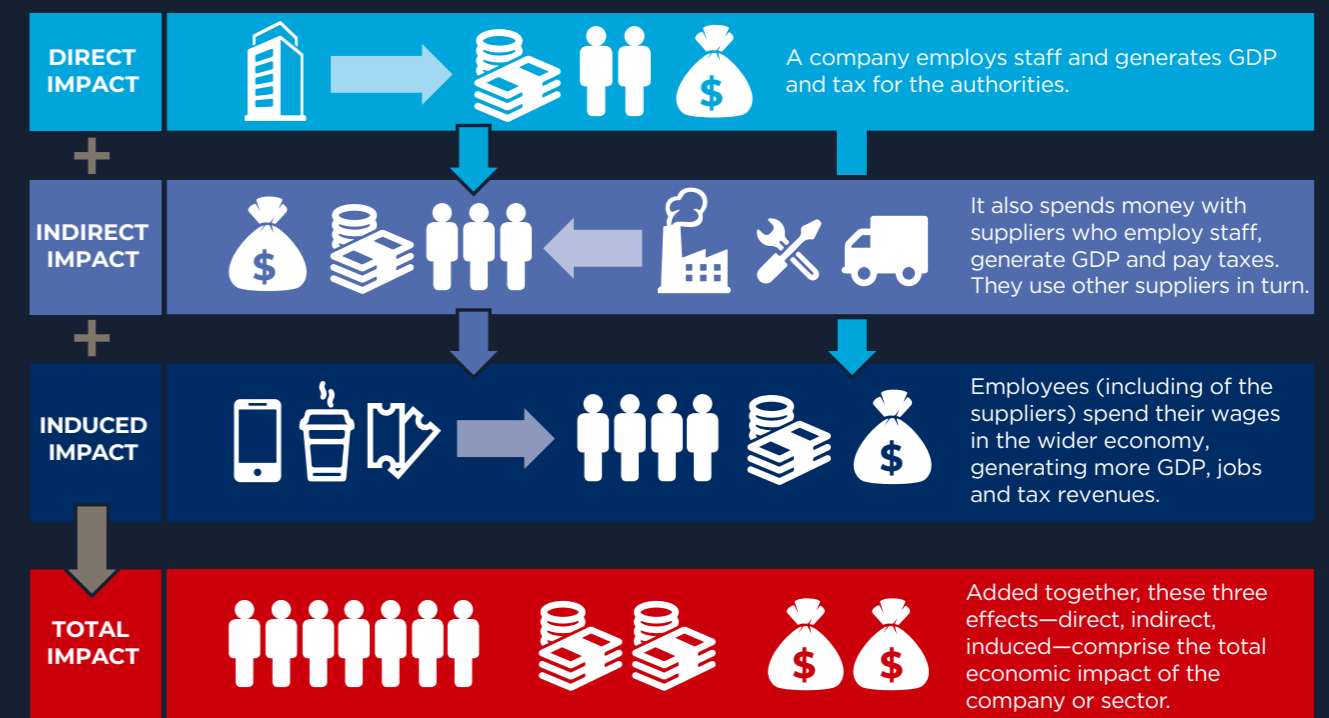
We assess the economic impact of cruise tourism in the United States using a standard approach known as an economic impact analysis that quantifies the impact of the cruise industry across three “core” channels:

- **Direct impact**—this relates to the economic activity supported by expenditure directly linked to the cruise industry. This includes visitor spending at ports, cruise line operational and capital purchases, wage-linked consumption by cruise line employees. Additionally, we quantify direct cruise line employment and associated wages within this study where appropriate.
- **Indirect impact**—captures supply chain effects that follow on from direct impacts. For example, purchases by businesses of goods and services from other businesses.
- **Induced impact**—captures the income effect and flow on to household consumption. Direct and indirect impacts generate employment and wages among businesses, and these employees then spend elsewhere in the economy.

This approach enables us to present the economic impact of cruise tourism in the United States across four key metrics:

- **Output**—this consists of those goods or services that are produced by a company or industry. To calculate output, we add together the value of the inputs used in the production process including labour, capital, and intermediate goods and services. Output is closely linked to turnover.<sup>2</sup>
- **GDP**—the gross-value added contribution to GDP. This reflects the value (after accounting for costs) that a business or sector receives for producing goods and services. This value is distributed between wages and profits.<sup>3</sup>
- **Employment**—the number of jobs supported.
- **Wages**—which includes the gross wages paid to workers but also includes benefits in-kind and employer social security contributions (including pensions).

## Channels of economic impact



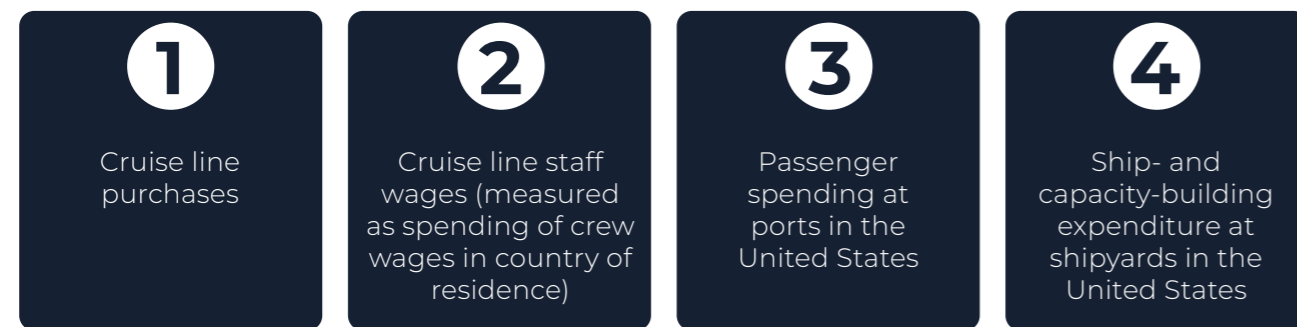
# CRUISE INDUSTRY'S ECONOMIC IMPACT IN THE UNITED STATES



# CRUISE INDUSTRY'S ECONOMIC IMPACT IN THE UNITED STATES

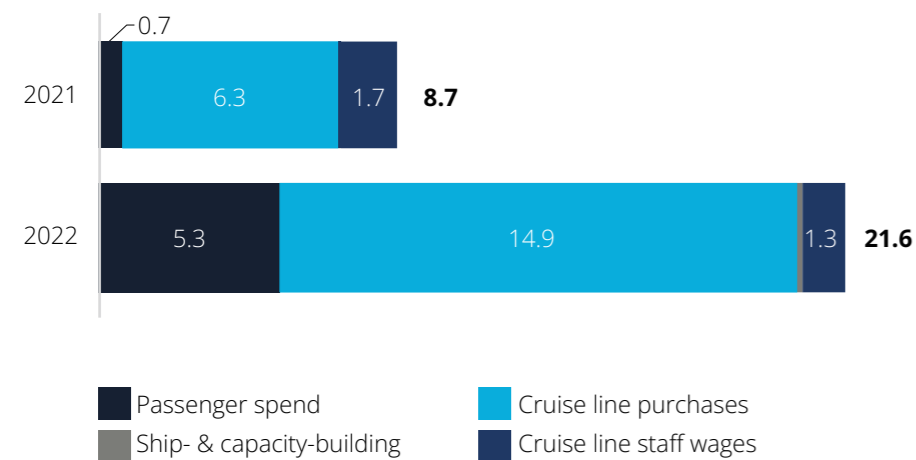
## 2.1 Direct Cruise-Linked Spending

The cruise industry's direct economic impact in the United States is assessed through four main expenditure channels.



Expenditure through each of these channels supports economic activity and employment throughout the United States, to a greater or lesser degree depending on the amount of spend. The figure and commentary below summarise the spending performance of these four channels in 2022 and 2021. Areas that are key cruise destinations or points of embarkation like Alaska and Florida benefitted the most from the strong rebound in passenger traffic in 2022.

Fig. 4. Direct cruise-linked spending in United States, 2021 and 2022 (\$ billions)



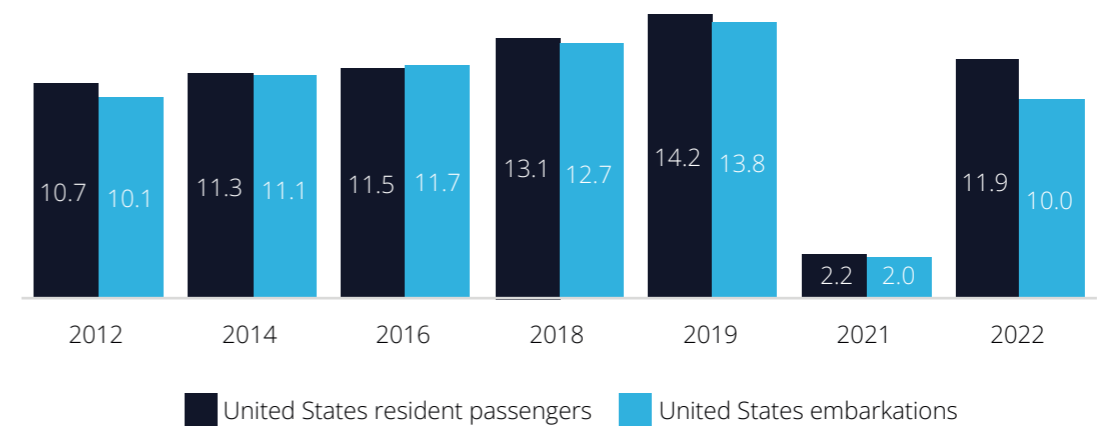
Source: Oxford Economics

During 2022, cruise lines supported \$21.6 billion of spending. Cruise line purchases were by far the biggest generator of direct cruise-linked spending with \$14.9 billion worth of spending, accounting for 69% of all direct cruise-linked spending. An additional \$5.3 billion was spent by passengers and crew ashore, while \$1.3 billion worth of spending came through cruise line staff wages – i.e., money earned by cruise line workers and spent in their place of residence.<sup>4</sup>

Ship- and capacity-building activities accounted for a very small portion of direct spending impacts with just \$170 million worth of spending coming through this channel in 2022, equivalent to 0.8% of all direct cruise-linked spending.

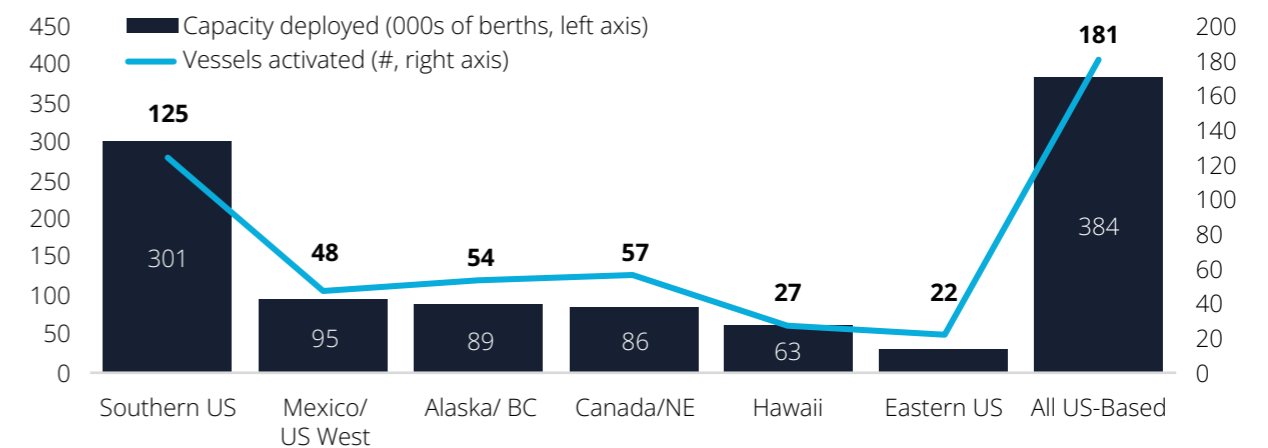
With the full resumption of cruise in 2022, there was a large increase in passenger spending and cruise line purchases – the items most sensitive to passenger traffic. This is reflected in the number of embarkations from the US, which increased fivefold from two million in 2021 to ten million in 2022. US-resident cruise passenger numbers experienced a similar growth rate and reduced the gap with record-setting 2019.

Fig. 5. United States cruise passengers, 2012-22 (millions)



Source: Oxford Economics

Fig. 6. Capacity deployed in the US and its adjacent regions, 2022



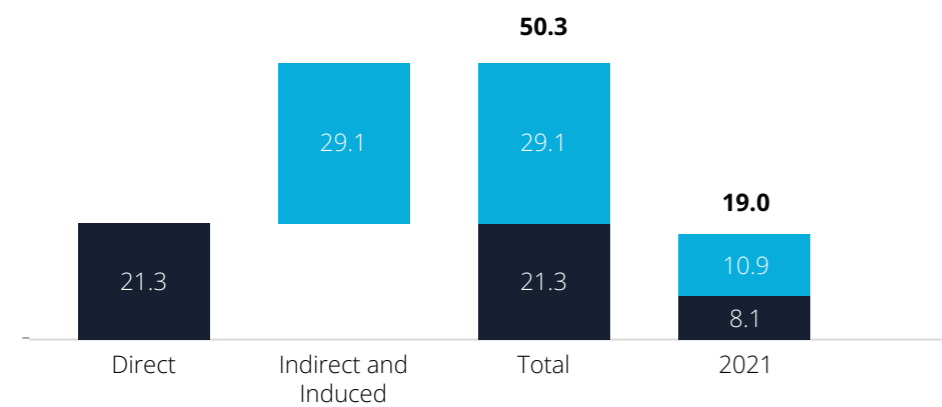
Source: Oxford Economics / Cruise-IP

## 2.2 Economic Impact

### 2.2.1 Output

Cruise-linked spending supports the production of goods and services (output) through direct, indirect, and induced channels. **Total output generated by the industry equalled \$50.3 billion in 2022. This included \$21.3 billion in direct impacts, and \$29.1 billion in indirect and induced impacts.**<sup>5</sup>

**Fig. 7. Cruise industry output in the United States, 2022 (\$ billions)**



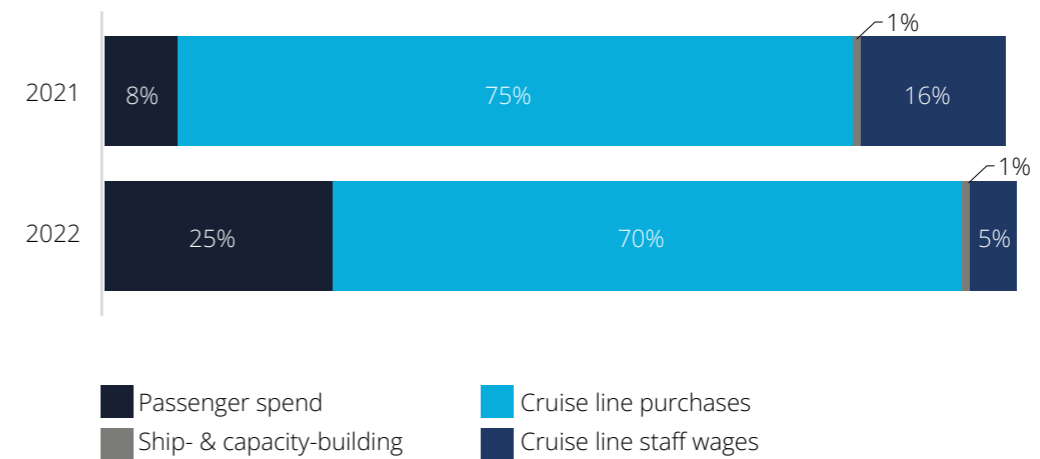
Source: Oxford Economics

<sup>5</sup> Input-output analysis produces three types of impacts – direct, indirect, and induced – as well as a total impact figure, which is the sum of these three components. As an example, cruise lines supported \$8.7 billion of spending in the US during 2021. This is the input which yielded \$8.1 billion of direct output in the form of US business sales, while the remainder represented taxes.

Most of the industry's overall output in 2022 was linked to cruise line purchases, equivalent to \$35.1 billion (70% of the total output impact). The US is the largest single source market for worldwide cruise, while Florida and Texas are key embarkation points for cruises in the Caribbean. As a result, Cruise line spending is a more important driver of economic impact of cruise in the United States than passenger or crew spending. The same pattern was also true in 2021, with cruise line spending driving three quarters of total output impact.

Onshore passenger spending accounted for 25% of the industry's overall output with impacts from this channel equating to \$12.8 billion in 2022. This is a large jump from the \$1.6 billion in 2021. Ship- and capacity-building accounted for a negligible proportion of the industry's overall impact – just 0.8% or \$417 million.

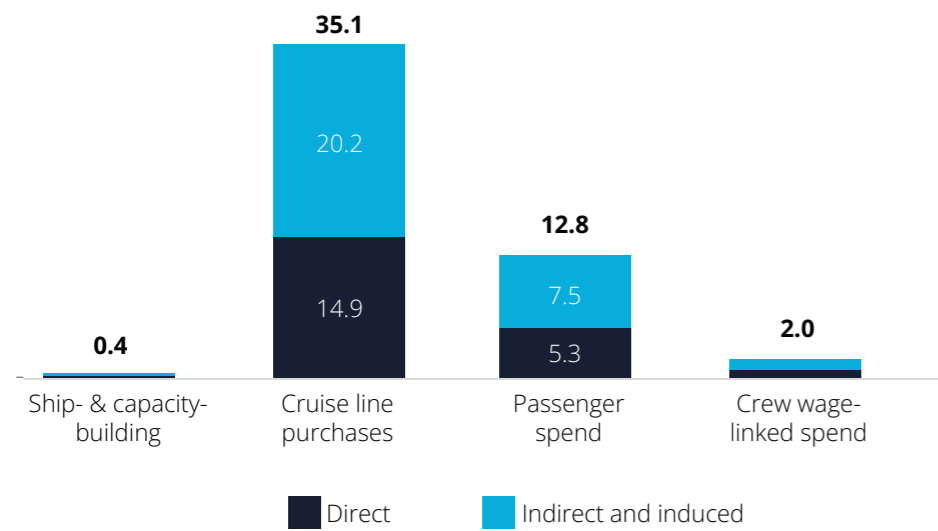
**Fig. 8. Composition of cruise industry's overall output impact in the United States, 2021 and 2022 (share of total)**



Source: Oxford Economics



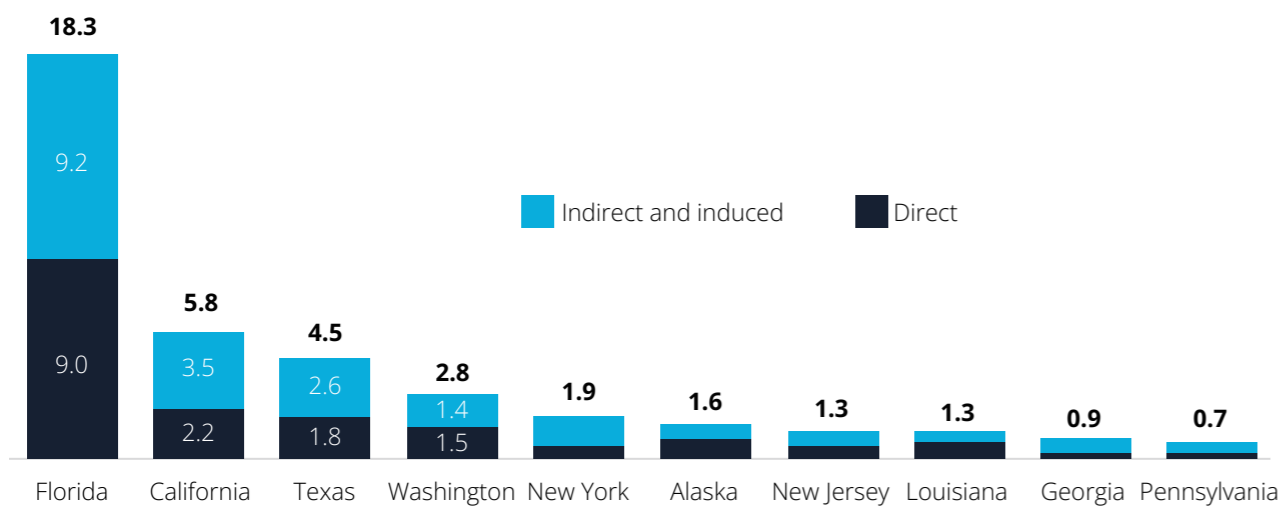
**Fig. 9. Composition of cruise industry's output impacts by channel, 2022 (\$ billions)**



Source: Oxford Economics

The industry's contribution varied by state, with some states seeing greater output generated by the cruise compared to others. Florida enjoyed the highest contribution from the cruise industry by far relative to other US states, with total output generated by the industry's activities equating to \$18.3 billion in 2022. California and Texas rounded out the top three with total output stemming from the cruise industry's activities in 2022 equating to \$5.8 and \$4.5 billion each, respectively.

**Fig. 10. Composition of cruise industry's output impacts by state and channel, 2022 (\$ billions)**



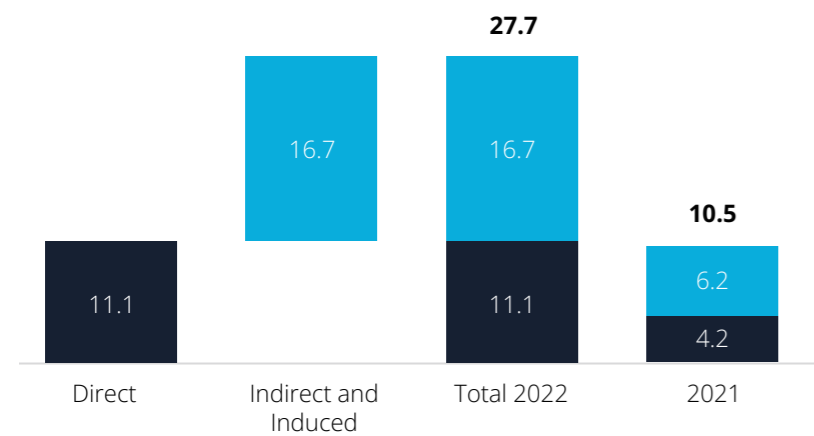
Source: Oxford Economics

Cruise line spending supported the majority **(70%)** of the cruise industry's impact. It was followed up by passenger spending **(25%)**.

## 2.2.2 GDP

The cruise industry is estimated to have contributed **\$27.7 billion in gross domestic product (GDP) to the United States economy in 2022**. Of this, \$11.1 billion was delivered through direct effects, and the remaining \$16.7 billion through indirect and induced effects. Indirect effects include supply chain effects and induced effects include household consumption resulting from the income effect.

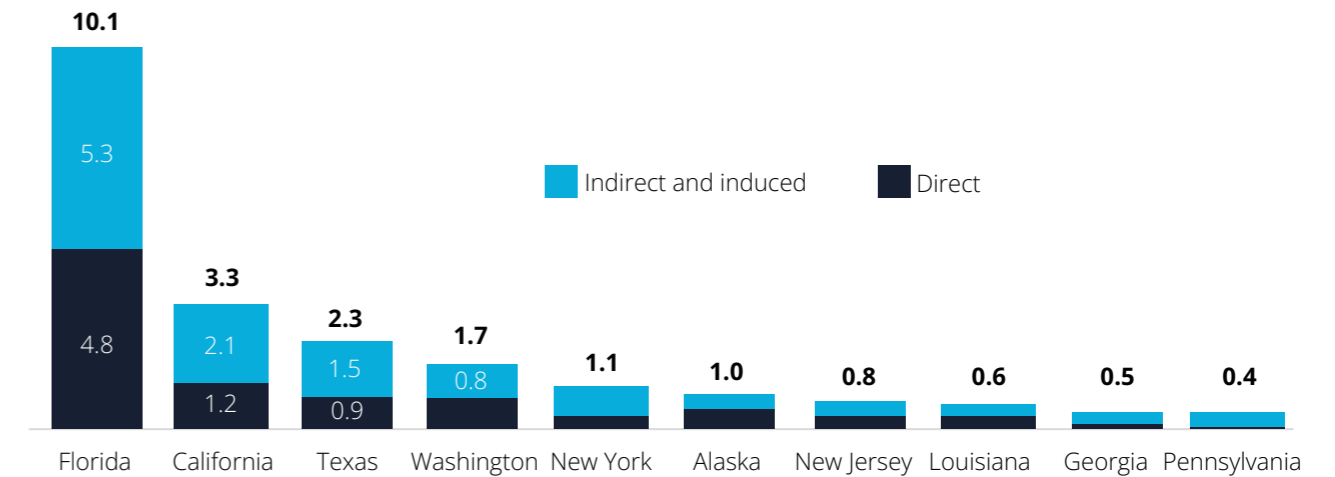
**Fig. 11. Cruise industry GDP in the United States, 2022 (\$ billions)**



Source: Oxford Economics

The GDP impacts across the United States varied by state but tended to mirror the state rankings based on industry output. Again, Florida was the chief beneficiary based on GDP generated by the industry's activities. In 2022, cruise industry GDP in Florida totalled \$10.1 billion; with similar shares coming through direct and indirect and induced channels. Again, California and Texas rounded out the top three with the industry's total GDP coming to \$3.3 and \$2.3 billion for each, respectively.

**Fig. 12. Cruise industry GDP by state, 2022 (\$ billions)**



Source: Oxford Economics



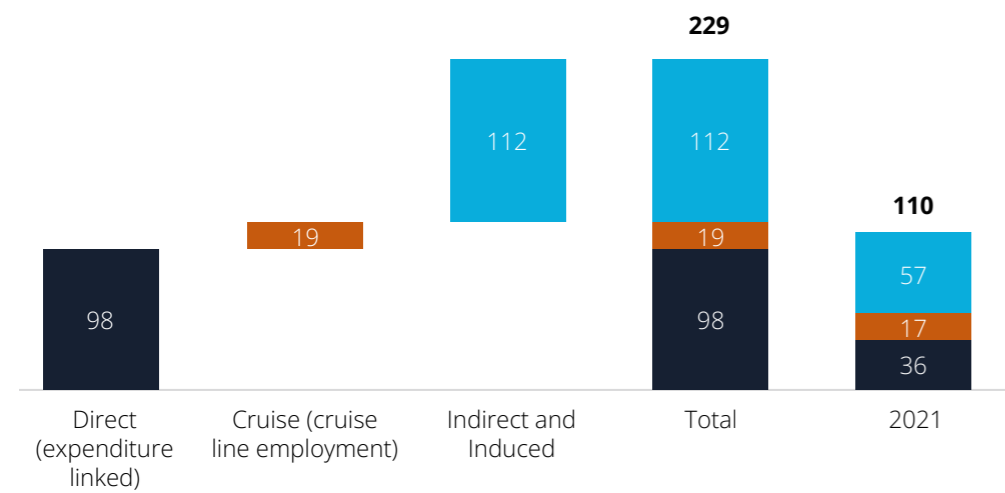
Florida was the chief US beneficiary with a total GDP impact of **\$10.1 billion**. It was followed by California and Texas, at **\$3.3** and **\$2.3 billion** respectively.

### 1.2.3 Employment

The industry's presence in the United States required a workforce to sustain it. **In total, the cruise industry supported 229,000 jobs across the United States in 2022.** When assessing the impact of employment, we include the employment supported by the expenditure channels linked to cruise (through direct, indirect, and induced channels) as well as the employment sustained by the cruise lines themselves.

It is estimated that 229,000 jobs were attributable to the industry's activities in the country, including direct, indirect, and induced employment effects. Almost 98,000 jobs were generated through direct effects (linked to cruise industry expenditure) with an additional 19,000 provided directly by the cruise lines. A further 112,000 came through indirect and induced effects.

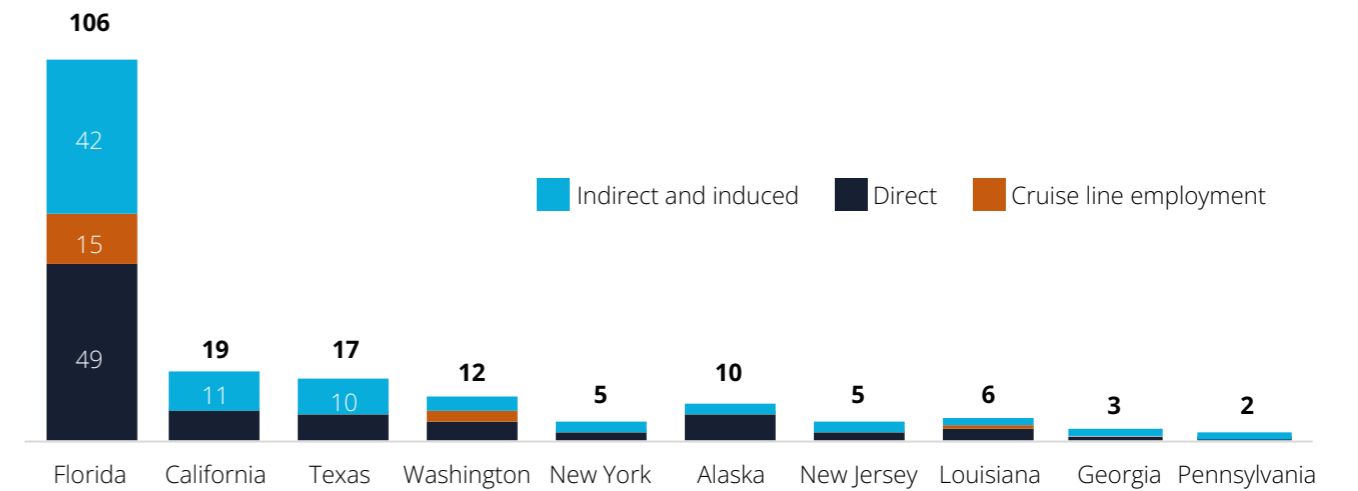
**Fig. 13. Cruise industry employment in the United States, 2022 (000s of jobs)**



Source: Oxford Economics

The industry supported the greatest volume of jobs in Florida with an estimated 106,000 jobs generated through cruise and its related activity in 2022. 60% of these jobs were generated directly, either through direct employment with the cruise lines or through directly associated activities. California enjoyed the second greatest volume of jobs through the industry and its activities, which supported almost 19,000 jobs in 2022. Texas was third with more than 17,000 jobs supported by the industry and its activities.

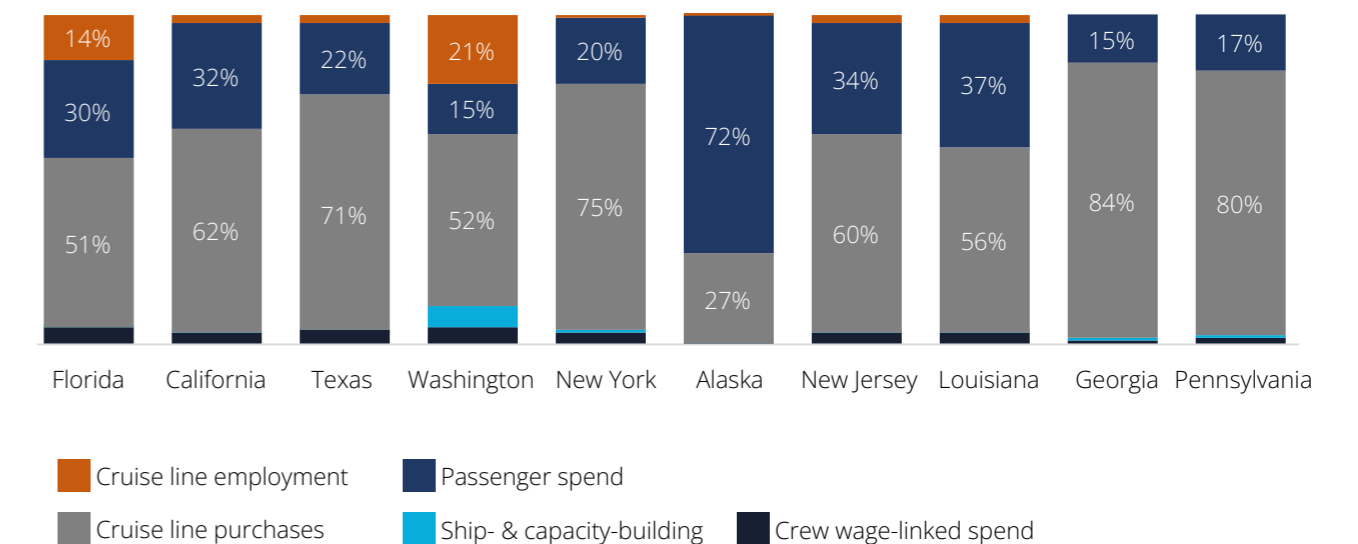
**Fig. 14. Cruise industry employment by state, 2022 (000s of jobs)**



Source: Oxford Economics

The biggest proportion of jobs created and supported by the industry and its activities tended to come through cruise line purchases. Alaska is an exception to this rule, as passenger spending supported the greatest volume of jobs (72%) there. This is because it is a popular cruise destination for transit but not embarkation, where a large part of cruise line purchases occur. Washington has the largest share of employment generated coming directly from cruise line employees (21%). This is because a few large cruise lines have their headquarters in Seattle.

**Fig. 15. Employment generated by cruise industry by channel and state, 2022 (% of total jobs)**

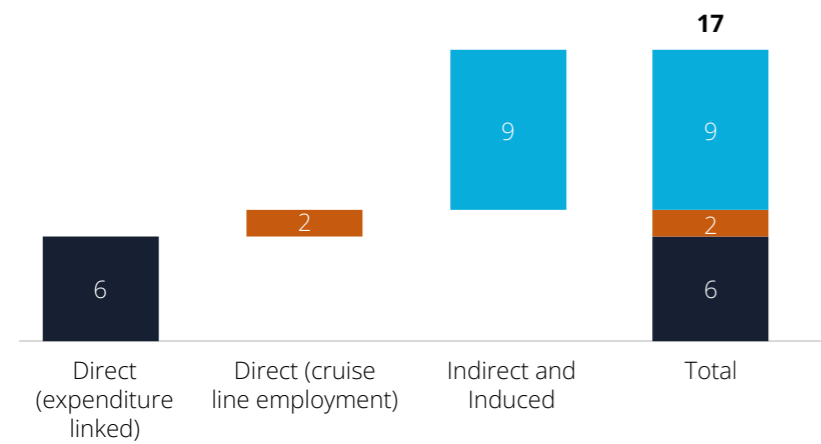


Source: Oxford Economics

### 1.2.4 Wages

The cruise industry provided significant wages for US workers through direct cruise line employment and additionally through direct, indirect, and induced effects related to the industry's activities at US ports<sup>6</sup>. **Total wages provided or supported by the industry in the United States overall equated to an estimated \$17.2 billion in 2022**, with \$1.6 billion provided directly through cruise line employment, \$6.2 billion direct (expenditure-linked), and \$9.4 billion through indirect and induced channels.

Fig. 16. Cruise industry wages in the United States, 2022 (\$ billions)

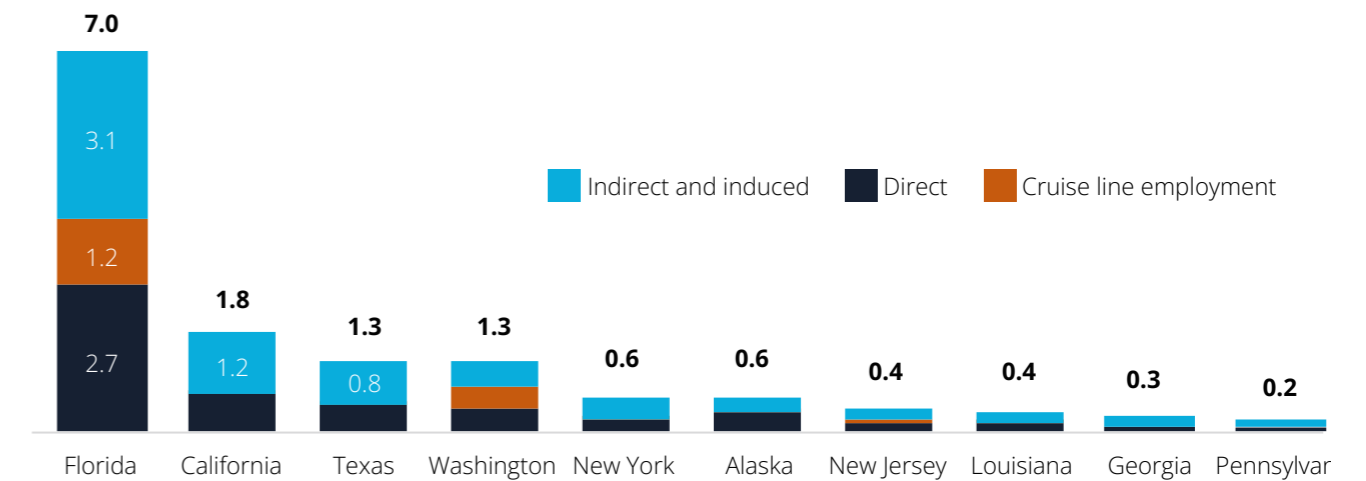


Source: Oxford Economics

<sup>6</sup> Unlike output and GDP, but similar to employment, we include the impact of cruise line employment in our wage analysis as well as the impact of cruise linked spending.

The volume of wages generated via cruise activity within a given state will be a function of the level and composition of cruise activity in that country. For example, shipbuilding would generate more wages for skilled shipbuilders compared to passenger and crew spending which is more likely to support lower wage work (e.g., those paid to a café or shop worker). Further, average (and statutory minimum) wage rates vary by state which means that while two states might enjoy similar levels and composition of cruise activity, different wage rates could yield higher total wages for one state compared to the other.

Fig. 17. Cruise industry wages by state, 2022 (\$ billions)



Source: Oxford Economics

The cruise industry provided and supported wages worth **\$17.2 billion** in the US in 2022.



## 2.2.5 Sectors

Cruise-linked spending supports economic activity across all major industry sectors in the US. Cruise line purchases, as well as ship- and capacity building spending, totalling \$15.1 billion represent purchases from a range of US businesses. In particular, cruise lines spent \$2.6 billion on the output of manufacturing businesses, including \$1.3 billion on providers of petroleum and coal products, and \$500 million on transportation equipment producers. This supported 3,300 direct jobs in the manufacturing sector, with \$264 million of wages. Also, cruise lines spent an estimated \$2.5 billion on information services and another \$2.3 billion on administrative and support services, among other sectors.

Cruise passengers spent \$2.9 billion on transportation, such as air fares, and \$1.7 billion on accommodations and food services. The rest was split between retail and entertainment activities.

**Fig. 18. Cruise industry direct impacts by sector, 2022**

	Spending (\$ mn)	Employment (000s)	Wages (\$ mn)
<b>Passenger spending</b>			
Transportation	2,855	20.8	1,009
Accommodation and food service	1,657	12.8	480
Arts, entertainment and recreation	151	1.3	59
Retail	624	3.0	96
<b>Total</b>	<b>5,285</b>	<b>38</b>	<b>1,645</b>
<b>Cruise line purchases, ship- and capacity-building</b>			
Agriculture, forestry, mining, construction	78	0.3	23
Manufacturing	2,628	3.3	264
Petroleum & coal products	1,337	0.7	60
Transportation equipment	500	1.3	81
Food	270	0.4	28
Machinery	96	0.2	26
Computer and electronic product	91	0.2	16
Electrical equipment and component	86	0.1	13
Fabricated metal product	82	0.1	12
Other	166	0.3	29
Wholesale trade	555	0.9	92
Retail trade	846	5.6	249
Transportation and warehousing	1,624	7.2	446
Information	2,483	2.2	524
Finance, insurance, real estate	969	4.1	375
Professional, scientific and technical services	1,804	7.4	674
Administrative and support services	2,334	16.7	1,040
Accommodation and food services	123	1.2	49
Other	1,647	10.8	832
<b>Total</b>	<b>15,092</b>	<b>60</b>	<b>4,568</b>
<b>Staff income</b>			
Cruise line employment	1,262	19	1,578
<b>Total</b>			
<b>Total</b>	<b>21,639</b>	<b>117</b>	<b>7,791</b>

Source: Oxford Economics

Cruise line-linked spending supports total economic impacts across US sectors. For example, as direct cruise line suppliers purchase inputs, this supports further purchases and activity across sectors, including additional manufacturing outputs, information sector outputs such as publishing and broadcasting, and additional services from the finance, real estate, and professional services sectors. Also, as employees in directly supported jobs spend a portion of their wages on goods and services, it supports activity in a variety of US businesses, who in turn make purchases from other US businesses.

Some of the largest overall output impacts were in manufacturing, transportation and warehousing, and information services at \$6.1, \$5.8 and \$5.5 billion respectively.

**Fig. 19. Cruise industry total impacts by sector, 2022**

	Spending (\$ mn)	Employment (000s)	Wages (\$ mn)
<b>Cruise line purchases, ship- and capacity-building, passenger spending</b>			
Agriculture, forestry, fishing and hunting	407	2.2	97
Mining, quarrying, oil and gas extraction	695	0.6	129
Utilities	721	0.4	99
Construction	272	0.9	66
Manufacturing	6,141	8.5	789
Wholesale trade	2,127	4.1	466
Retail trade	2,325	16.9	765
Transportation and warehousing	5,833	36.3	2,250
Information (e.g. publishing, telecommunications)	5,538	5.2	1,207
Finance and insurance	4,021	11.2	1,202
Real estate, rental and leasing	3,280	6.2	309
Professional, scientific and technical services	3,942	16.2	1,734
Management of companies	958	3.0	459
Administrative, support services	3,674	27.1	1,715
Educational services	189	2.1	113
Health care and social assistance	1,830	12.5	937
Arts, entertainment and recreation	550	5.0	210
Accommodations and food service	3,027	24.5	987
Other services (except public administration)	1,984	14.6	998
Government	788	3.8	407
<b>Total</b>	<b>48,303</b>	<b>201</b>	<b>14,941</b>
<b>Staff income</b>			
Cruise line employment	2,030	27	2,226
<b>Total</b>			
<b>Total</b>	<b>50,333</b>	<b>229</b>	<b>17,167</b>

Source: Oxford Economics

# US STATE PROFILES



# US STATE PROFILES

## 3.1 FLORIDA

In 2022, the cruise industry supported more than 106,000 jobs and generated a total output impact of \$18.3 billion in Florida.

Florida was the main beneficiary of the cruise activity in the US as it represented around 53% of total embarkation activity in the country in 2022. Florida ports, three of which are included in the top ten in the world, are the main gateway to the Caribbean, the largest cruise region in the world. Moreover, the state hosts multiple headquarters for leading international cruise line operators, providing jobs directly and indirectly.

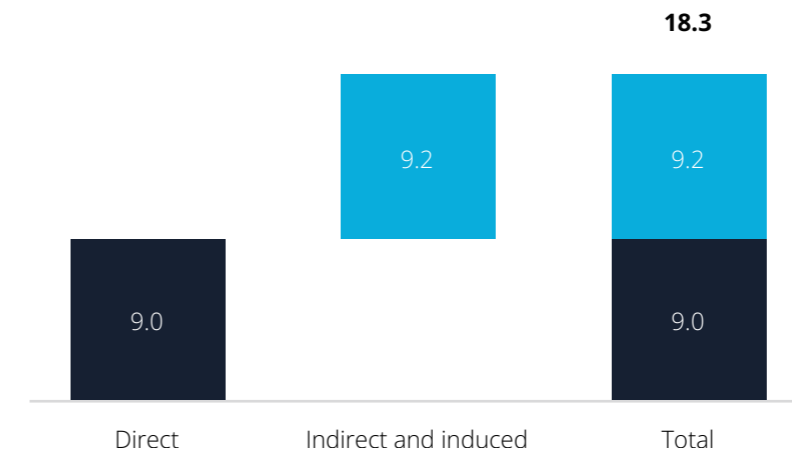
Florida residents represented about 20% of US cruisers in 2022, compared to 17% in 2019. Most of them (85%) travel to the Caribbean.

In 2022, Florida's cruise industry supported more than **106,000 jobs** and generated a total output of **\$18.3 billion**.

### 3.1.1 Output

In Florida, activities related to the cruise industry's presence generated a total output impact of \$18.3 billion in 2022. Of this, \$9.0 billion was generated directly, with the remaining output (\$9.2 billion) coming through indirect and induced effects.

Fig. 20. Cruise industry output in Florida, 2022 (\$ billions)

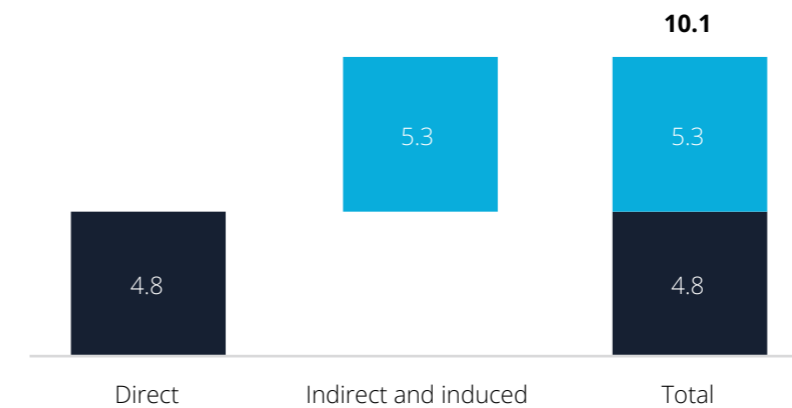


Source: Oxford Economics

### 3.1.1 GDP

Total GDP generated by the cruise industry equated to \$10.1 billion, of which \$4.8 billion came through direct effects and an additional \$5.3 billion coming through indirect and induced effects.

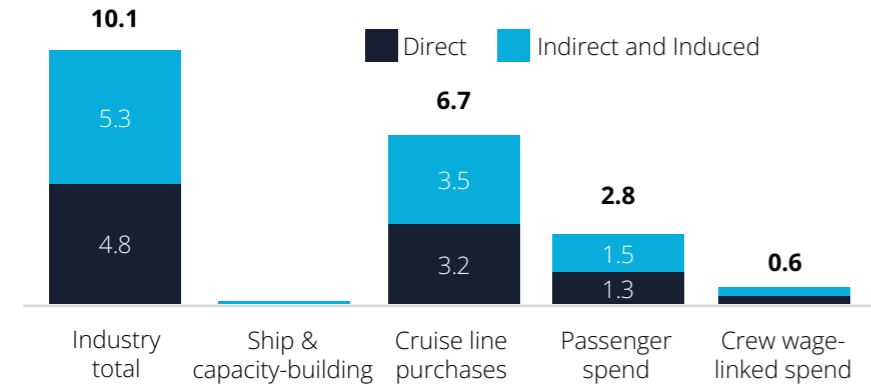
Fig. 21. Cruise industry GDP in Florida, 2022 (\$ billions)



Source: Oxford Economics

The cruise industry's impact on Florida's economy was delivered through three key activities: cruise line purchases, on-shore passenger spending, and the wage-linked spending of crew that reside in Florida. Cruise line purchases contributed \$6.7 billion to GDP, and passenger spend an additional \$2.8 billion. Crew wage-linked spend made a smaller contribution of around \$0.6 billion. Ship- and capacity-building activities were not significant.

**Fig. 22. Composition of cruise industry GDP and impact channel in Florida, 2022 (\$ billions)**



Source: Oxford Economics

**Fig. 23. Cruise industry GDP in Florida versus other US states, 2022**

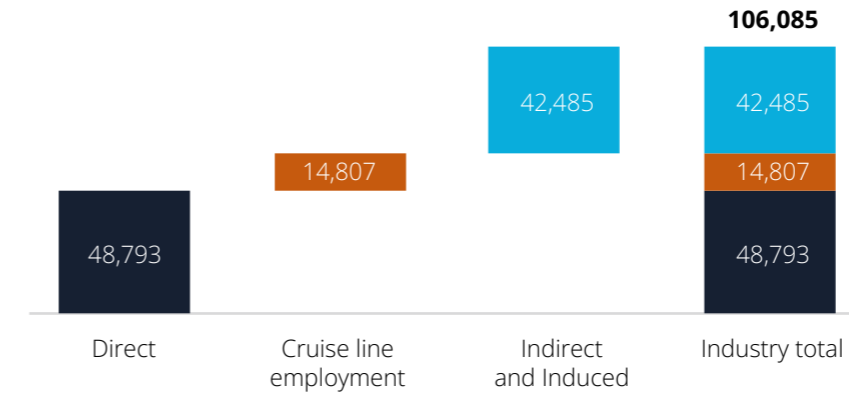
	Total GDP (\$ mn)	% US Total
<b>1 Florida</b>	<b>10,098</b>	<b>36.4%</b>
2 California	3,315	12.0%
3 Texas	2,336	8.4%
4 Washington	1,688	6.1%
5 New York	1,114	4.0%
6 Alaska	955	3.4%
7 New Jersey	765	2.8%
8 Louisiana	626	2.3%
9 Georgia	467	1.7%
10 Pennsylvania	407	1.5%
<b>United States</b>	<b>27,740</b>	<b>100.0%</b>

Source: Oxford Economics.

### 3.1.2 Employment

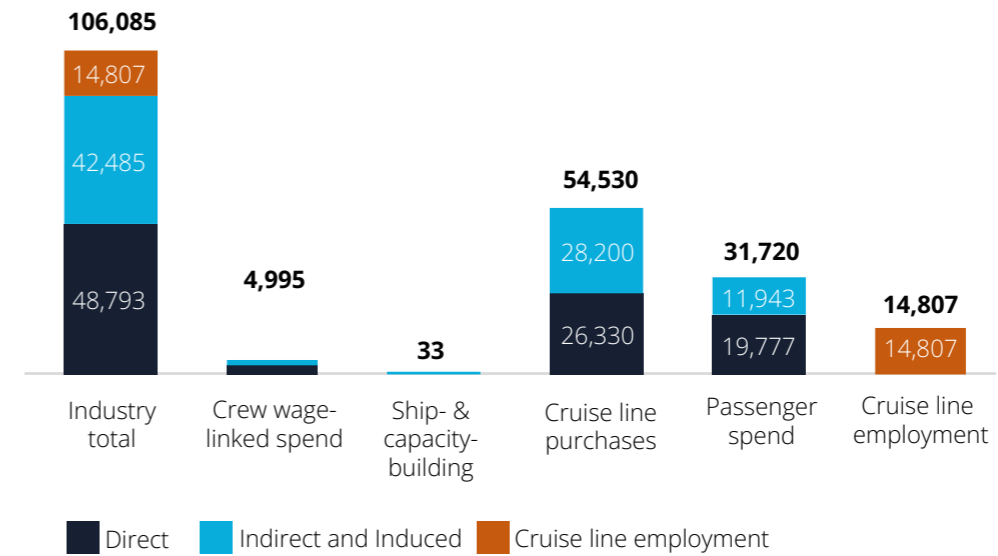
Cruise line employment (i.e., employees based on cruise ships and cruise line office staff) equated to an estimated 14,807 jobs in 2022. In addition, cruise lines also created jobs in the wider economy, with a total of 91,278 jobs created through direct, indirect, and induced expenditure effects. Most of these jobs (51%) were created via cruise line purchases and related activities.

**Fig. 24. Cruise industry employment in Florida, 2022 (number of jobs)**



Source: Oxford Economics

**Fig. 25. Composition of cruise industry employment and impact channel in Florida, 2022 (number of jobs)**



Source: Oxford Economics

### 3.1.3 Summary of Impacts

Fig. 26. Summary of cruise industry activity and impacts in Florida, 2022

	Direct Cruise Line Employment	Florida	United States
<b>Passengers (000s)</b>	Transit	720	6,260
	Embark	5,365	10,137
	Debark	5,235	9,950
	<b>Total passengers</b>	<b>11,320</b>	<b>26,348</b>
<b>Spend (\$ Millions)</b>	Passengers	2,334	5,285
	Cruise line purchases	6,536	14,921
	Shipbuilding	-	170
	Staff income	957	1,262
	<b>Total spend</b>	<b>9,827</b>	<b>21,639</b>
<b>Output (\$ Millions)</b>	Direct	9,031	21,252
	Indirect and induced	9,236	29,081
	<b>Total output</b>	<b>18,268</b>	<b>50,333</b>
<b>GDP (\$ Millions)</b>	Direct	4,810	11,055
	Indirect and induced	5,288	16,684
	<b>Total GDP</b>	<b>10,098</b>	<b>27,740</b>
<b>Employment (000s)</b>	Direct (expenditure linked)	49	98
	Direct (cruise line employment)	15	19
	Indirect and Induced	42	112
	<b>Total employment</b>	<b>106</b>	<b>229</b>

Source: Oxford Economics



In 2022, the cruise industry generated a total output impact of **\$18.3 billion** in Florida, including **\$9.0 billion** in direct output and **\$9.2 billion** in indirect and induced output.

### 3.2 CALIFORNIA

In 2022, the cruise industry supported almost 19,000 jobs and generated a total output impact of nearly \$5.8 billion in California.

California was also a key state supporting the re-start of cruise activity in 2022 with its three main ports supporting destinations in the West Coast and Mexico. Californian ports represented 12% of the embarkation activity in the U.S. in 2022, higher than the pre-pandemic market share.

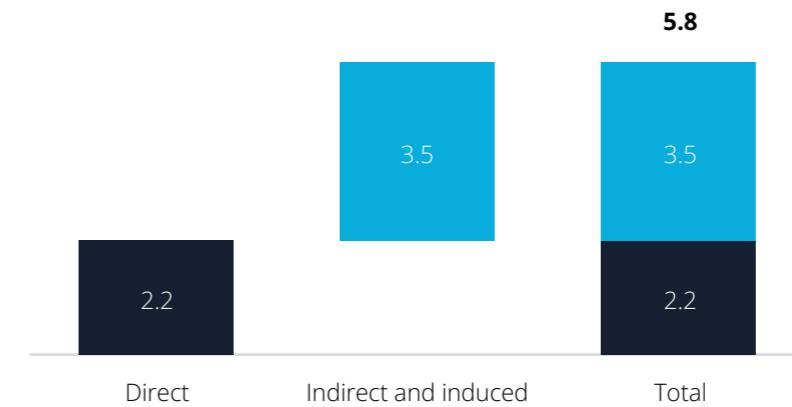
California was again a leading cruise source market in the United States, with more than 1.2 million cruise passengers in 2022. Most (54%) of Californian cruise passengers are choosing to cruise on the West Coast or Mexico.

In 2022, California's cruise industry supported close to **19,000 jobs** and generated a total output of **\$5.8 billion**.

#### 3.2.1 Output

In California, activities related to the cruise industry's presence generated a total output impact of \$5.8 billion in 2022. Of this, \$2.2 billion was generated directly, with the remaining output (\$3.5 billion) coming through indirect and induced effects.

Fig. 27. Cruise industry output in California, 2022 (\$ billions)

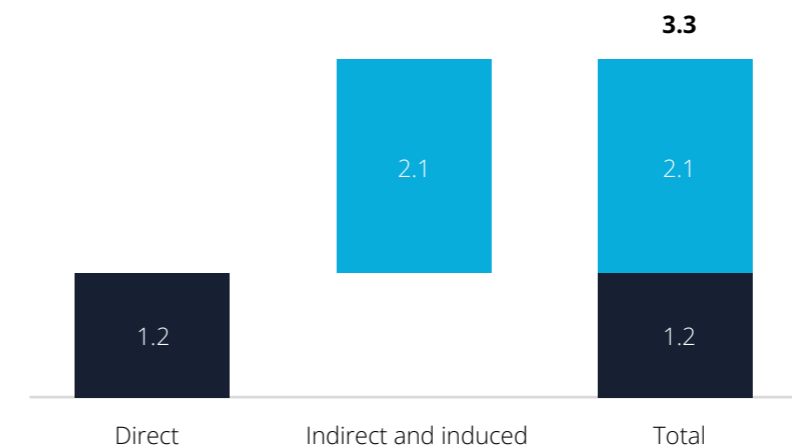


Source: Oxford Economics

#### 3.2.2 GDP

Total GDP generated by the cruise industry equated to \$3.3 billion, of which \$1.2 billion came through direct effects and an additional \$2.1 billion coming through indirect and induced effects.

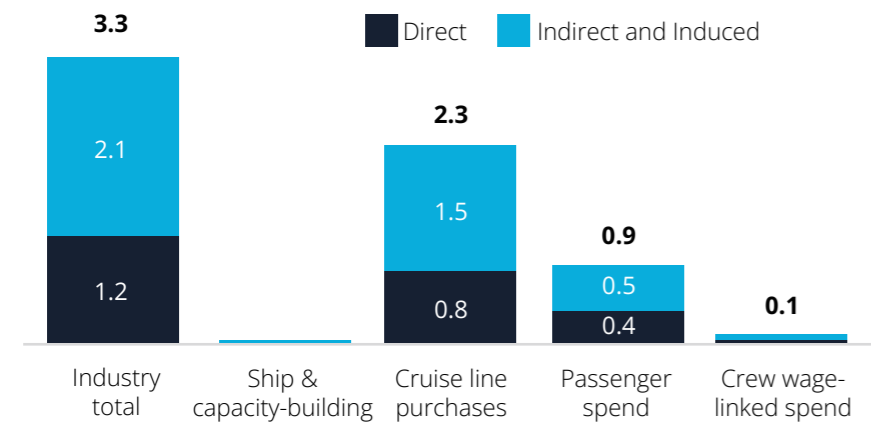
Fig. 28. Cruise industry GDP in California, 2022 (\$ billions)



Source: Oxford Economics

The cruise industry's impact on the Californian economy was delivered through three key activities: cruise line purchases, on-shore passenger spending, and the wage-linked spending of crew that reside in California. Cruise line purchases contributed \$2.3 billion to GDP, while passenger spend added another \$0.9 billion. Crew wage-linked spend made modest contributions of \$106 million of total GDP, while ship- and capacity-building activities were not significant.

**Fig. 29. Composition of cruise industry GDP and impact channel in California, 2022 (\$ billions)**



Source: Oxford Economics

**Fig. 30. Cruise industry GDP in California versus other US states, 2022**

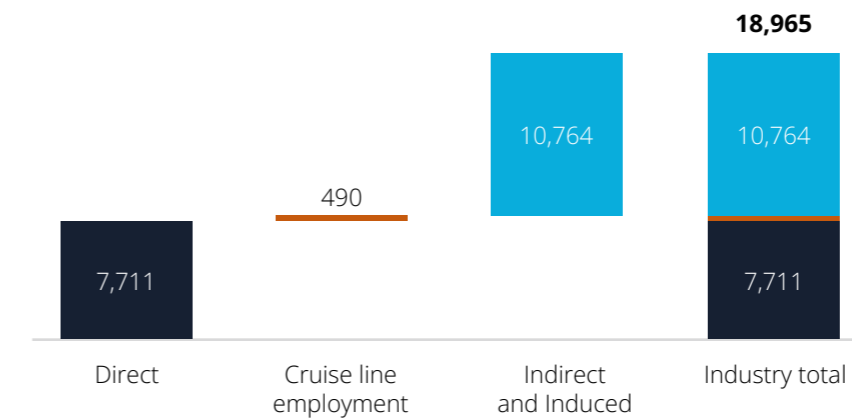
Rank	State	Total GDP (\$ mn)	% US Total
1	Florida	10,098	36.4%
2	California	3,315	12.0%
3	Texas	2,336	8.4%
4	Washington	1,688	6.1%
5	New York	1,114	4.0%
6	Alaska	955	3.4%
7	New Jersey	765	2.8%
8	Louisiana	626	2.3%
9	Georgia	467	1.7%
10	Pennsylvania	407	1.5%
	<b>United States</b>	<b>27,740</b>	<b>100.0%</b>

Source: Oxford Economics

### 3.2.3 Employment

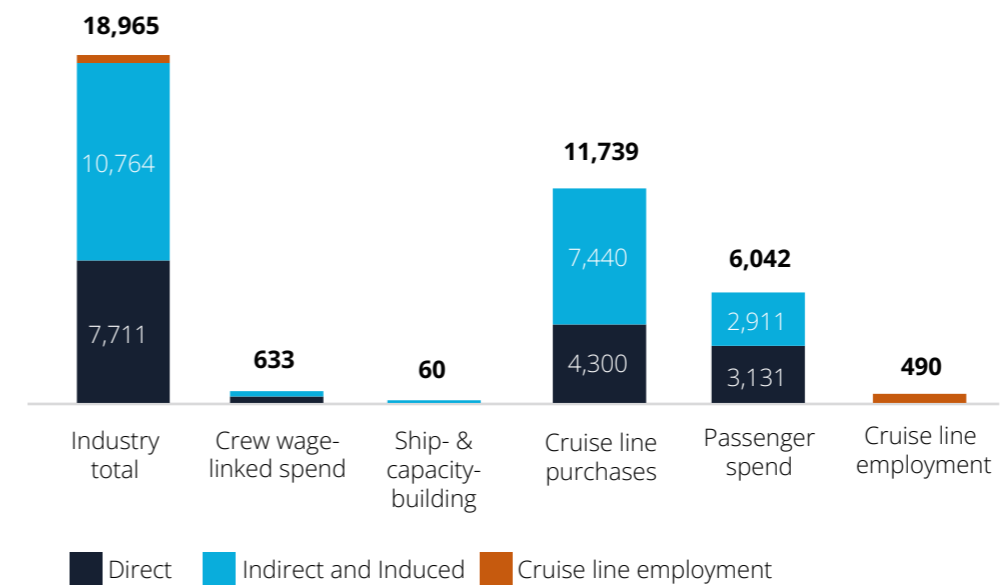
Cruise line employment (i.e., employees based on cruise ships and cruise line office staff) delivered a negligible number of jobs in 2022. But cruise line activity created jobs in the wider economy, with a total of almost 19,000 jobs supported through direct, indirect, and induced effects. Most of these jobs (62%) were created via cruise line purchases and related activities.

**Fig. 31. Cruise industry employment in California, 2022 (number of jobs)**



Source: Oxford Economics

**Fig. 32. Composition of cruise industry employment and impact channel in California, 2022 (number of jobs)**



Source: Oxford Economics

### 3.2.4 Summary of Impacts

Fig. 33. Summary of cruise industry activity and impacts in California, 2022

	Direct Cruise Line Employment	California	United States
<b>Passengers (000s)</b>	Transit	145	6,260
	Embark	1,207	10,137
	Debark	1,173	9,950
	<b>Total passengers</b>	<b>2,525</b>	<b>26,348</b>
<b>Spend (\$ Millions)</b>	Passengers	581	5,285
	Cruise line purchases	1,455	14,921
	Shipbuilding	-	170
	Staff income	8	1,262
	<b>Total spend</b>	<b>2,044</b>	<b>21,639</b>
<b>Output (\$ Millions)</b>	Direct	2,250	21,252
	Indirect and induced	3,504	29,081
	<b>Total output</b>	<b>5,754</b>	<b>50,333</b>
<b>GDP (\$ Millions)</b>	Direct	1,235	11,055
	Indirect and induced	2,080	16,684
	<b>Total GDP</b>	<b>3,315</b>	<b>27,740</b>
<b>Employment (000s)</b>	Direct (expenditure linked)	8	98
	Direct (cruise line employment)	0	19
	Indirect and Induced	11	112
	<b>Total employment</b>	<b>19</b>	<b>229</b>

Source: Oxford Economics



### 3.3 TEXAS

In 2022, the cruise industry supported nearly 17,400 jobs and generated a total output impact of \$4.5 billion in Texas.

The port of Galveston represented 10.3% of United States embarkation activity in 2022 compared to 8% in 2019, supporting the rebound in cruise operations. Moreover, more than 1.2 million Texan residents cruised in 2022, with most (80%) selecting itineraries in the Caribbean.

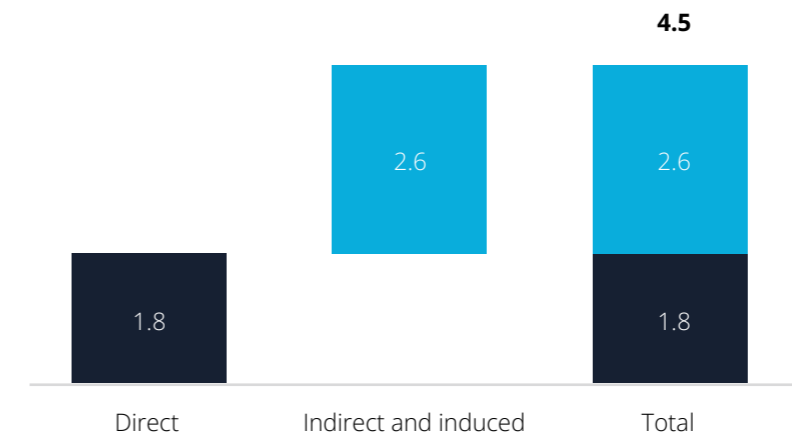
In 2022, Texas's cruise industry supported nearly **17,400 jobs** and generated a total output of **\$4.5 billion.**



#### 3.3.1 Output

In Texas, activities related to the cruise industry's presence generated a total output impact of \$4.5 billion in 2022. Of this, \$1.8 billion was generated directly, with the remaining output (\$2.7 billion) coming through indirect and induced effects.

Fig. 34. Cruise industry output in Texas, 2022 (\$ billions)

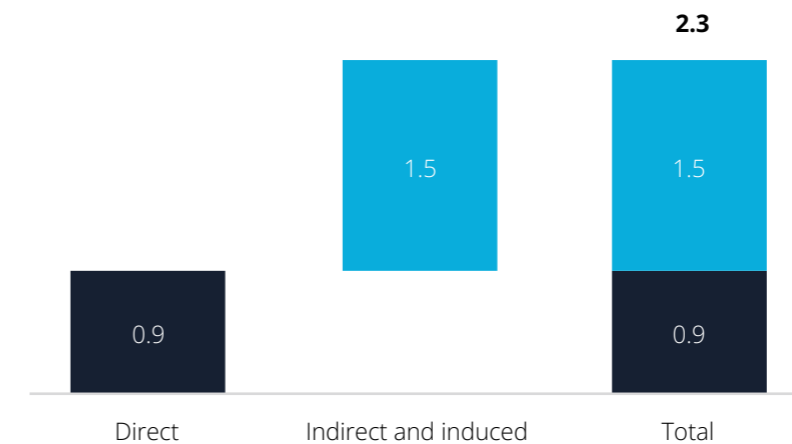


Source: Oxford Economics

#### 3.3.2 GDP

Total GDP generated by the cruise industry equated to \$2.3 billion, of which \$0.9 billion came through direct effects and an additional \$1.5 billion coming through indirect and induced effects.

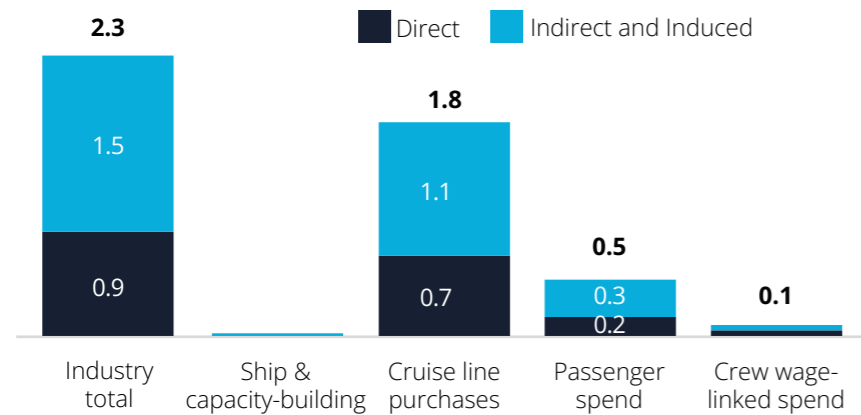
Fig. 35. Cruise industry GDP in Texas, 2022 (\$ billions)



Source: Oxford Economics

The cruise industry's impact on the Texas economy was delivered through three key activities: cruise line purchases, on-shore passenger spending, and the wage-linked spending of crew that reside in Texas. Cruise line purchases contributed \$1.8 billion to GDP, while passenger spend added a further \$0.5 billion. Crew wage-linked spend made a smaller contribution of \$86 million while ship- and capacity-building activities were not significant.

**Fig. 36. Composition of cruise industry GDP and impact channel in Texas, 2022 (\$ billions)**



Source: Oxford Economics

**Fig. 37. Cruise industry GDP in Texas versus other US states, 2022**

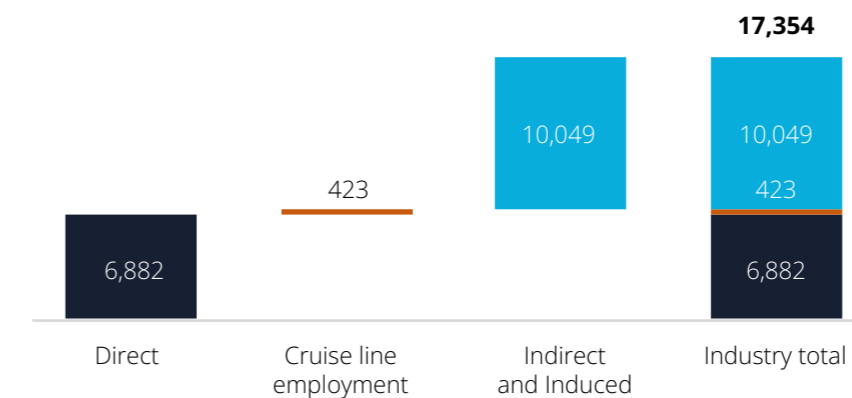
Rank	State	Total GDP (\$ mn)	% US Total
1	Florida	10,098	36.4%
2	California	3,315	12.0%
3	<b>Texas</b>	<b>2,336</b>	<b>8.4%</b>
4	Washington	1,688	6.1%
5	New York	1,114	4.0%
6	Alaska	955	3.4%
7	New Jersey	765	2.8%
8	Louisiana	626	2.3%
9	Georgia	467	1.7%
10	Pennsylvania	407	1.5%
	<b>United States</b>	<b>27,740</b>	<b>100.0%</b>

Source: Oxford Economics

### 3.3.3 Employment

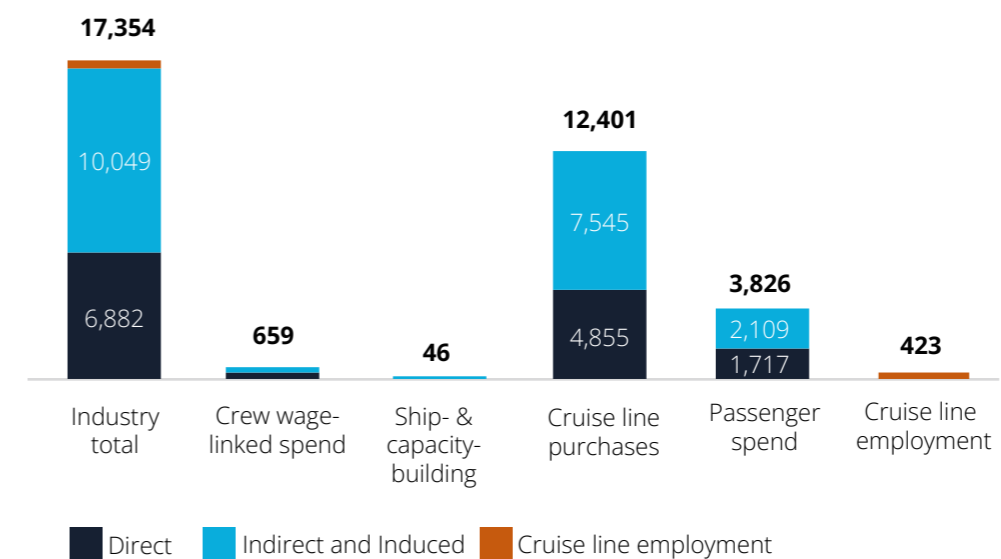
Cruise line employment (i.e., employees based on cruise ships and cruise line office staff) delivered a small number of jobs in 2022 (estimated at 423). But cruise line activity created jobs in the wider economy, with a total of 16,931 jobs created through direct, indirect, and induced effects. Most of these jobs (71%) were created via cruise line purchases and related activities.

**Fig. 38. Cruise industry employment in Texas, 2022 (number of jobs)**



Source: Oxford Economics

**Fig. 39. Composition of cruise industry employment and impact channel in Texas, 2022 (number of jobs)**



Source: Oxford Economics

### 3.3.4 Summary of Impacts

Fig. 40. Summary of cruise industry activity and impacts in Texas, 2022

	Direct Cruise Line Employment	Texas	United States
<b>Passengers (000s)</b>	Transit	-	6,260
	Embark	1,040	10,137
	Debark	1,040	9,950
	<b>Total passengers</b>	<b>2,080</b>	<b>26,348</b>
<b>Spend (\$ Millions)</b>	Passengers	307	5,285
	Cruise line purchases	1,314	14,921
	Shipbuilding	-	170
	Staff income	7	1,262
	<b>Total spend</b>	<b>1,627</b>	<b>21,639</b>
<b>Output (\$ Millions)</b>	Direct	1,819	21,252
	Indirect and induced	2,647	29,081
	<b>Total output</b>	<b>4,467</b>	<b>50,333</b>
<b>GDP (\$ Millions)</b>	Direct	855	11,055
	Indirect and induced	1,481	16,684
	<b>Total GDP</b>	<b>2,336</b>	<b>27,740</b>
<b>Employment (000s)</b>	Direct (expenditure linked)	7	98
	Direct (cruise line employment)	0	19
	Indirect and Induced	10	112
	<b>Total employment</b>	<b>17</b>	<b>229</b>

Source: Oxford Economics



In 2022, the cruise industry generated a total output impact of **\$4.5 billion** in Texas, including **\$1.8 billion** in direct output and **\$2.6 billion** in indirect and induced output.

### 3.4 WASHINGTON

In 2022, the cruise industry supported close to 12,500 jobs and generated a total output impact of more than \$2.8 billion in the Washington economy.

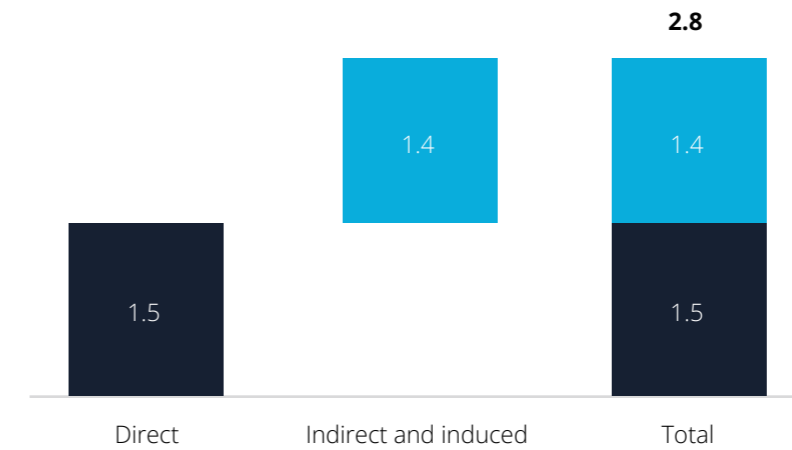
Washington State is home to the port of Seattle, which supports itineraries to the Alaska and British Columbia cruise region. It attracts a high share of passenger in the premium category - the Premium cruise segment represented 34% of the capacity deployed in Seattle in 2022 compared to 20% globally.

In 2022, Washington's cruise industry supported close to **12,500 jobs** and generated a total output of **\$2.8 billion**.

#### 3.4.1 Output

In Washington, activities related to the cruise industry's presence generated a total output impact of \$2.9 billion in 2022. Of this, \$1.5 billion was generated directly, with the remaining output (\$1.4 billion) coming through indirect and induced effects.

Fig. 41. Cruise industry output in the Washington, 2022 (\$ billions)

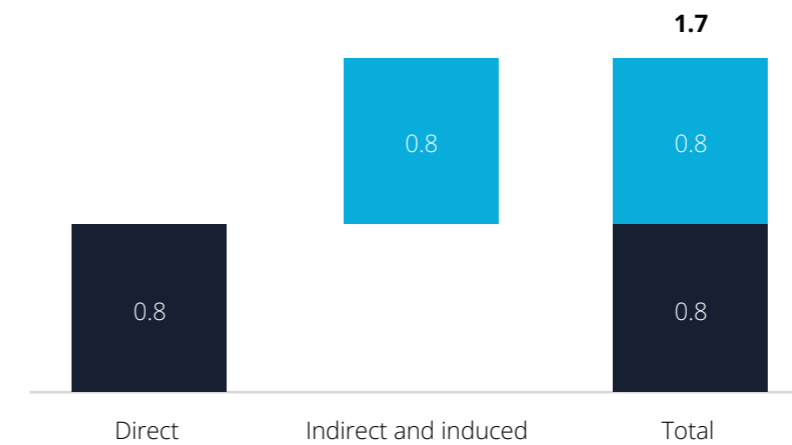


Source: Oxford Economics

#### 3.4.2 GDP

Total GDP generated by the cruise industry equated to \$1.7 billion, of which \$0.8 billion came through direct effects and an additional \$0.8 billion coming through indirect and induced effects.

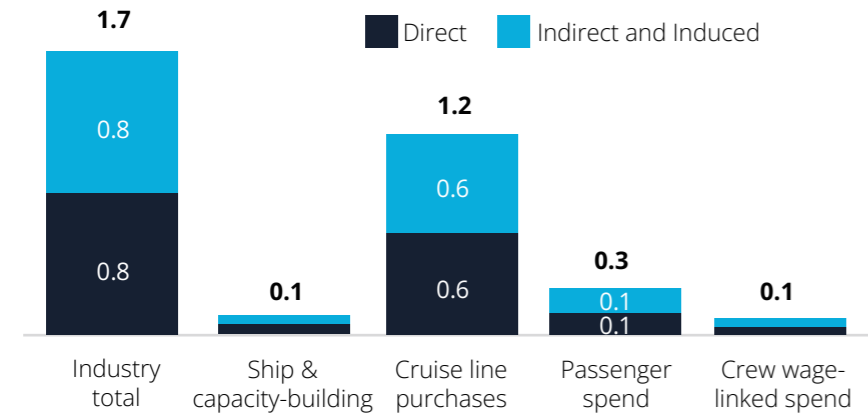
Fig. 42. Cruise industry GDP in the Washington, 2022 (\$ billions)



Source: Oxford Economics

The cruise industry's impact on the Washington economy was delivered through three key activities: cruise line purchases, on-shore passenger spending, and the wage-linked spending of crew that reside in Washington. Cruise line purchases contributed \$1.2 billion to GDP, and passenger spend added further \$0.3 billion. Crew wage-linked spend and ship- and capacity-building activities made modest contributions - each accounting for around \$105 and \$116 million of total GDP respectively.

**Fig. 43. Composition of cruise industry GDP and impact channel in the Washington, 2022 (\$ billions)**



Source: Oxford Economics

**Fig. 44. Cruise industry GDP in the Washington versus other US states, 2022**

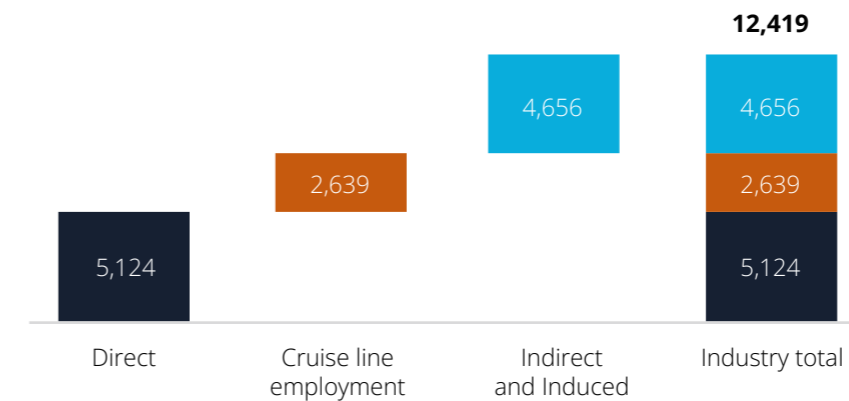
Rank	State	Total GDP (\$ mn)	% US Total
1	Florida	10,098	36.4%
2	California	3,315	12.0%
3	Texas	2,336	8.4%
4	<b>Washington</b>	<b>1,688</b>	<b>6.1%</b>
5	New York	1,114	4.0%
6	Alaska	955	3.4%
7	New Jersey	765	2.8%
8	Louisiana	626	2.3%
9	Georgia	467	1.7%
10	Pennsylvania	407	1.5%
	<b>United States</b>	<b>27,740</b>	<b>100.0%</b>

Source: Oxford Economics.

### 3.4.3 Employment

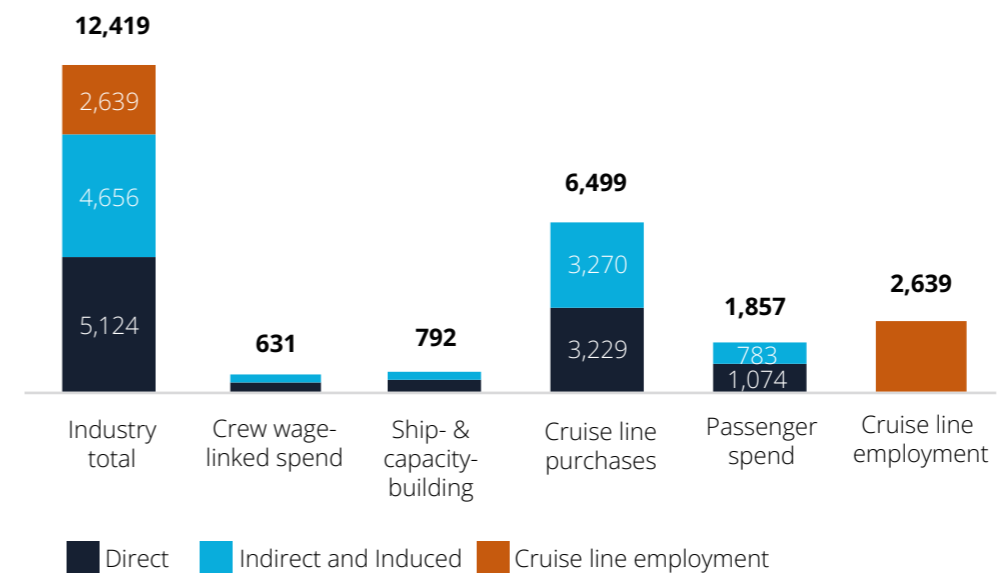
Cruise line employment (i.e., employees based on cruise ships and cruise line office staff) supported 2,639 jobs in 2022. This accounted for 21% of the total number of jobs supported in Washington in 2022. But cruise line activity also created jobs in the wider economy, with a total of 9,780 jobs created through direct, indirect, and induced effects. Most of the jobs (52%) were created via cruise line purchases and related activities.

**Fig. 45. Cruise industry employment in the Washington, 2022 (number of jobs)**



Source: Oxford Economics

**Fig. 46. Composition of cruise industry employment and impact channel in the Washington, 2022 (number of jobs)**



Source: Oxford Economics

### 3.4.4 Summary of Impacts

Fig. 47. Summary of cruise industry activity and impacts in the Washington, 2022

	Direct Cruise Line Employment	Washington	United States
<b>Passengers (000s)</b>	Transit	-	6,260
	Embark	640	10,137
	Debark	640	9,950
	<b>Total passengers</b>	<b>1,280</b>	<b>26,348</b>
<b>Spend (\$ Millions)</b>	Passengers	200	5,285
	Cruise line purchases	1,042	14,921
	Shipbuilding	116	170
	Staff income	278	1,262
	<b>Total spend</b>	<b>1,636</b>	<b>21,639</b>
<b>Output (\$ Millions)</b>	Direct	1,451	21,252
	Indirect and induced	1,384	29,081
	<b>Total output</b>	<b>2,836</b>	<b>50,333</b>
<b>GDP (\$ Millions)</b>	Direct	841	11,055
	Indirect and induced	846	16,684
	<b>Total GDP</b>	<b>1,688</b>	<b>27,740</b>
<b>Employment (000s)</b>	Direct (expenditure linked)	5	98
	Direct (cruise line employment)	3	19
	Indirect and Induced	5	112
	<b>Total employment</b>	<b>12</b>	<b>229</b>

Source: Oxford Economics

In 2022, the cruise industry generated a total output impact of **\$2.8 billion** in Washington, including **\$1.5 billion** in direct output and **\$1.4 billion** in indirect and induced output.



### 3.5 NEW YORK

In 2022, the cruise industry supported nearly 5,400 jobs and generated a total output impact of close to \$1.9 billion in New York state.

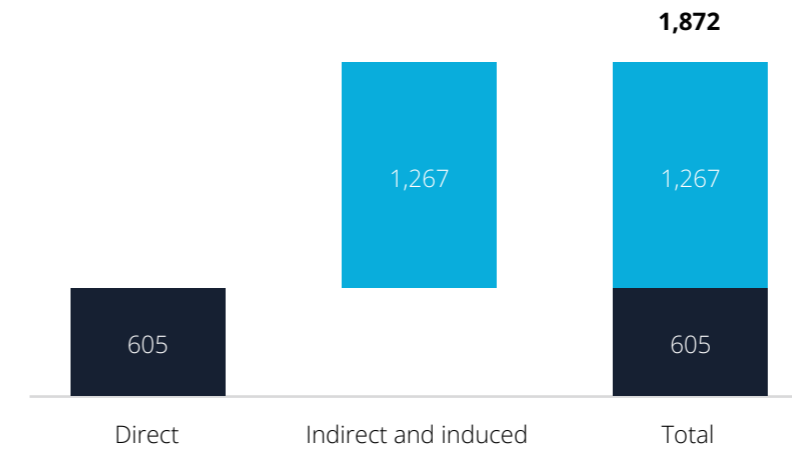
Close to 500,000 New York residents cruised in 2022 with about 68% of them traveling to the Caribbean. Two terminals in New York City are providing itineraries to Bermuda, the Caribbean, and Canada-New England.

In 2022, New York's cruise industry supported nearly **5,400 jobs** and generated a total output of **\$1.9 billion.**

### 3.5.1 Output

In New York, activities related to the cruise industry's presence generated a total output impact of \$1,872 million in 2022. Of this, \$605 million was generated directly, with the remaining output (\$1,267 million) coming through indirect and induced effects.

Fig. 48. Cruise industry output in New York, 2022 (\$ millions)

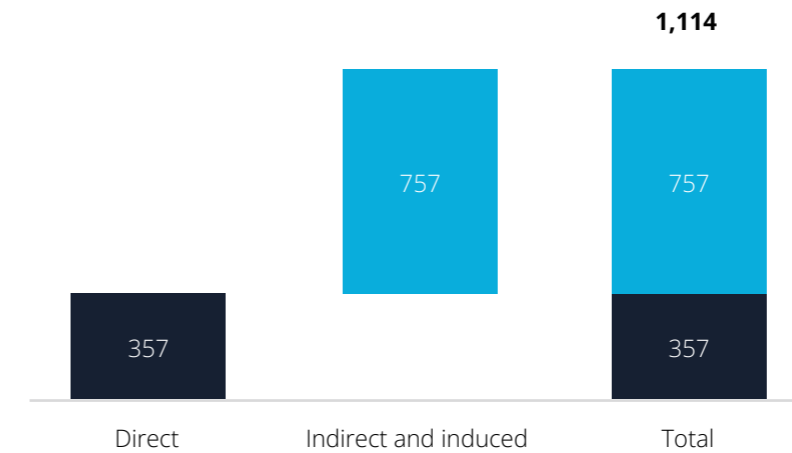


Source: Oxford Economics

### 3.5.2 GDP

Total GDP generated by the cruise industry equated to \$1,114 million, of which \$357 million came through direct effects and an additional \$757 million coming through indirect and induced effects.

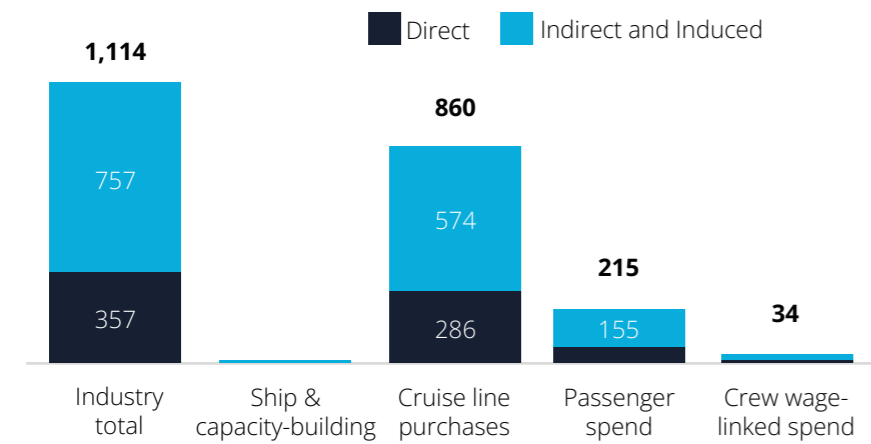
Fig. 49. Cruise industry GDP in New York, 2022 (\$ millions)



Source: Oxford Economics

The cruise industry's impact on New York's economy was delivered through three key activities: cruise line purchases, on-shore passenger spending, and the wage-linked spending of crew that reside in New York. Cruise line purchases contributed \$860 million to GDP, while passenger spend an additional \$215 million. Crew wage-linked spend made modest contributions of \$34 million while ship- and capacity-building activities were not significant.

**Fig. 50. Composition of cruise industry GDP and impact channel in New York, 2022 (\$ millions)**



Source: Oxford Economics

**Fig. 51. Cruise industry GDP in New York versus other US states, 2022**

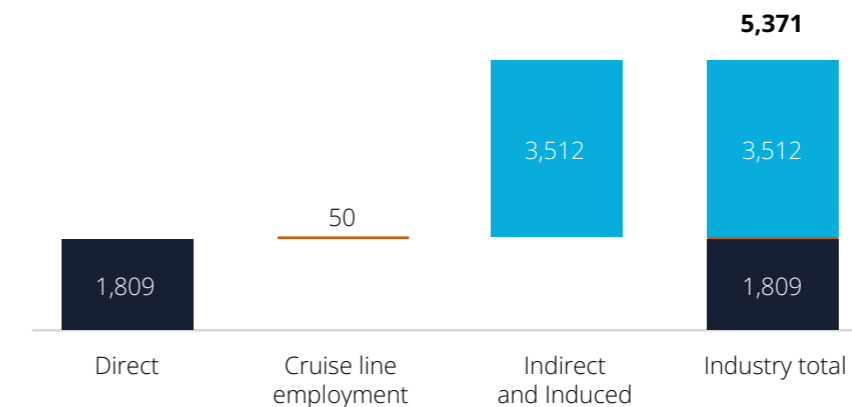
Rank	State	Total GDP (\$ mn)	% US Total
1	Florida	10,098	36.4%
2	California	3,315	12.0%
3	Texas	2,336	8.4%
4	Washington	1,688	6.1%
5	<b>New York</b>	<b>1,114</b>	<b>4.0%</b>
6	Alaska	955	3.4%
7	New Jersey	765	2.8%
8	Louisiana	626	2.3%
9	Georgia	467	1.7%
10	Pennsylvania	407	1.5%
	<b>United States</b>	<b>27,740</b>	<b>100.0%</b>

Source: Oxford Economics.

### 3.5.3 Employment

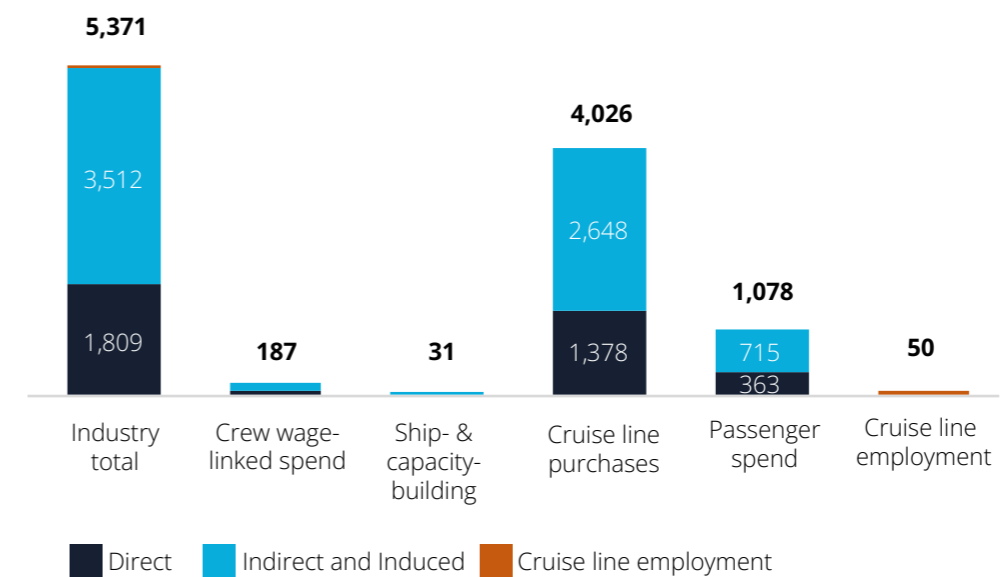
Cruise line employment (i.e., employees based on cruise ships and cruise line office staff) delivered a negligible number of jobs in 2022. But cruise line activity created jobs in the wider economy, with a total of 5,321 jobs created through direct, indirect, and induced effects. Most of these jobs (75%) were created via cruise line purchases and related activities.

**Fig. 52. Cruise industry employment in New York, 2022 (number of jobs)**



Source: Oxford Economics

**Fig. 53. Composition of cruise industry employment and impact channel in New York, 2022 (number of jobs)**



Source: Oxford Economics

### 3.5.4 Summary of Impacts

Fig. 54. Summary of cruise industry activity and impacts in New York, 2022

	Direct Cruise Line Employment	New York	United States
<b>Passengers (000s)</b>	Transit	28	6,260
	Embark	358	10,137
	Debark	350	9,950
	<b>Total passengers</b>	<b>737</b>	<b>26,348</b>
<b>Spend (\$ Millions)</b>	Passengers	103	5,285
	Cruise line purchases	491	14,921
	Shipbuilding	-	170
	Staff income	2	1,262
	<b>Total spend</b>	<b>596</b>	<b>21,639</b>
<b>Output (\$ Millions)</b>	Direct	605	21,252
	Indirect and induced	1,267	29,081
	<b>Total output</b>	<b>1,872</b>	<b>50,333</b>
<b>GDP (\$ Millions)</b>	Direct	357	11,055
	Indirect and induced	757	16,684
	<b>Total GDP</b>	<b>1,114</b>	<b>27,740</b>
<b>Employment (000s)</b>	Direct (expenditure linked)	2	98
	Direct (cruise line employment)	0	19
	Indirect and Induced	4	112
	<b>Total employment</b>	<b>5</b>	<b>229</b>

Source: Oxford Economics

In 2022, the cruise industry generated a total output impact of **\$1.9 billion** in New York, including **\$0.6 billion** in direct output and **\$1.3 billion** in indirect and induced output.



### 3.6 ALASKA

In 2022, the cruise industry supported close to 9,900 jobs and generated a total output impact of \$1.6 billion in Alaska.

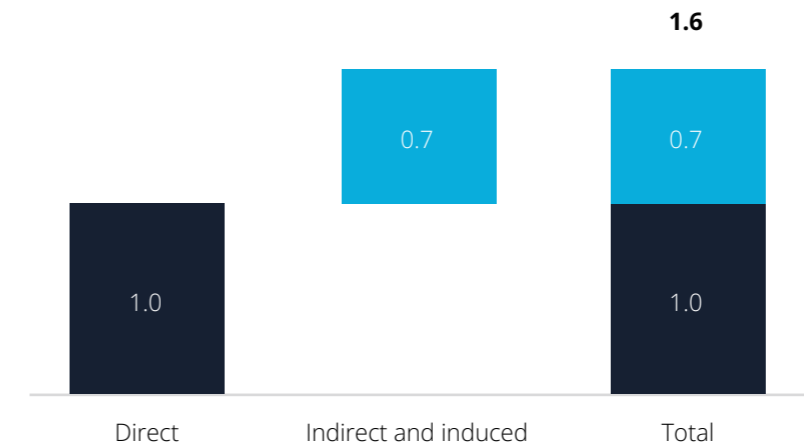
Alaska is the leading cruise destination in the US representing about two-third of cruise passenger transit activity in 2022. Three ports in the region, Juneau, Skagway and Sitka are in the top 25 ports worldwide. The region has a rapidly growing interest from passengers. This is reflected in the share of worldwide deployment captured in Alaska, growing from 5.5% in 2019 to 6.6% in 2022.

In 2022, Alaska's cruise industry supported close to **9,900 jobs** and generated a total output of **\$1.6 billion**.

#### 3.6.1 Output

In Alaska, activities related to the cruise industry's presence generated a total output impact of \$1.6 billion in 2022. Of this, \$1 billion was generated directly, with the remaining output (\$0.7 billion) coming through indirect and induced effects.

Fig. 55. Cruise industry output in Alaska, 2022 (\$ billions)

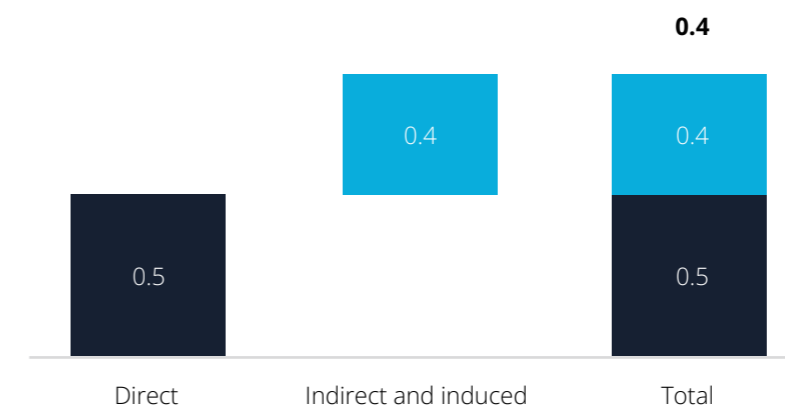


Source: Oxford Economics

#### 3.6.2 GDP

Total GDP generated by the cruise industry equated to \$1 billion, of which \$0.5 billion came through direct effects and an additional \$0.4 billion coming through indirect and induced effects.

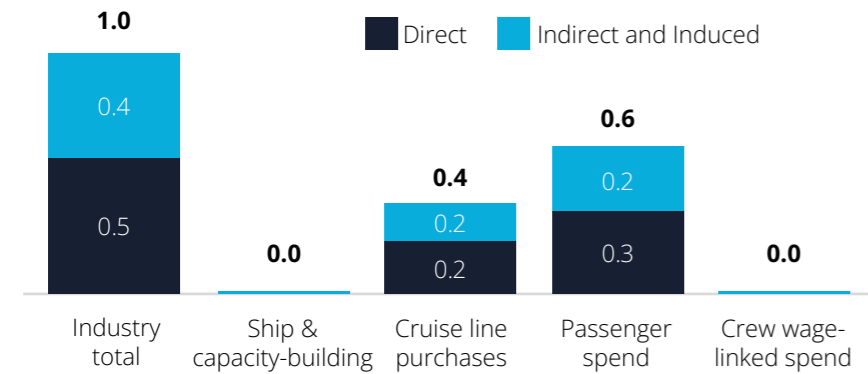
Fig. 56. Cruise industry GDP in Alaska, 2022 (\$ billions)



Source: Oxford Economics

The cruise industry's impact on the Alaska economy was delivered through three key activities: cruise line purchases, on-shore passenger spending, and the wage-linked spending of crew that reside in Alaska. Passenger spend contributed \$0.6 billion to GDP, while cruise line purchases added a further \$0.4 billion. Crew wage-linked spend made smaller contributions of around \$5 million to total GDP. Ship- and capacity-building activities were not significant.

**Fig. 57. Composition of cruise industry GDP and impact channel in Alaska, 2022 (\$ billions)**



Source: Oxford Economics

**Fig. 58. Cruise industry GDP in Alaska versus other US states, 2022**

Rank	State	Total GDP (\$ mn)	% US Total
1	Florida	10,098	36.4%
2	California	3,315	12.0%
3	Texas	2,336	8.4%
4	Washington	1,688	6.1%
5	New York	1,114	4.0%
6	<b>Alaska</b>	<b>955</b>	<b>3.4%</b>
7	New Jersey	765	2.8%
8	Louisiana	626	2.3%
9	Georgia	467	1.7%
10	Pennsylvania	407	1.5%
	<b>United States</b>	<b>27,740</b>	<b>100.0%</b>

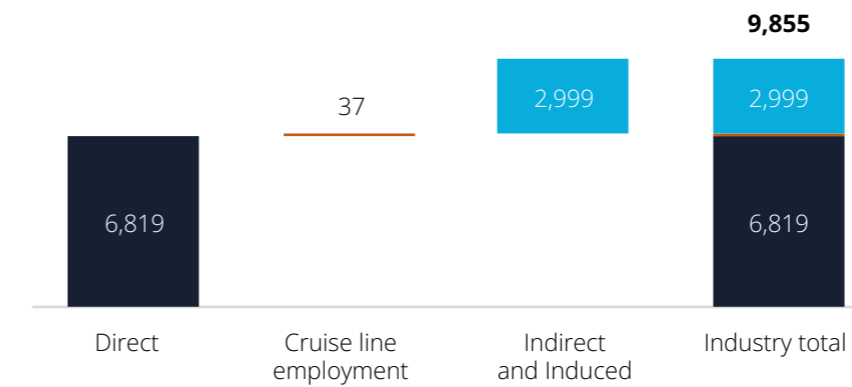
Source: Oxford Economics

### 3.6.3 Employment

#### 3.6.3 Employment

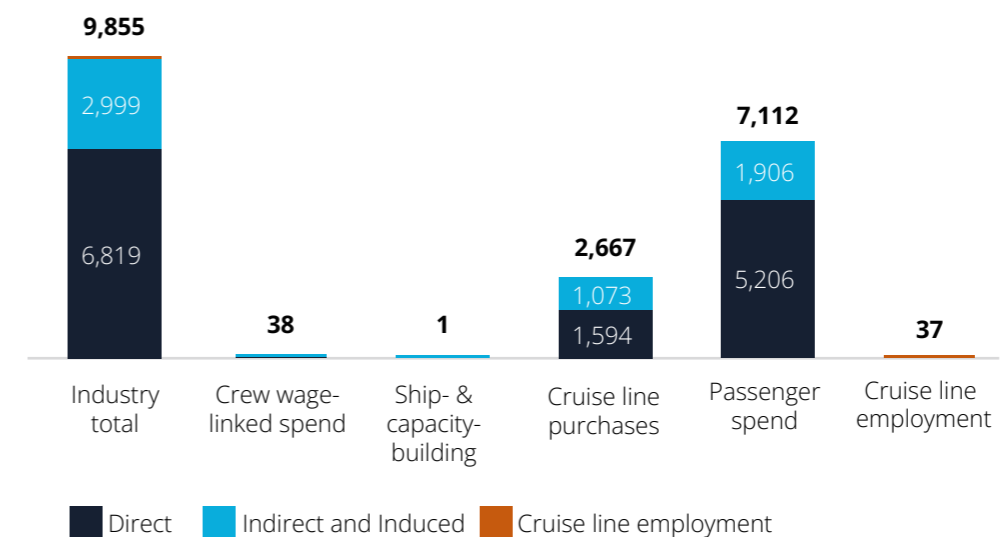
Cruise line employment (i.e., employees based on cruise ships and cruise line office staff) delivered a negligible number of jobs in 2022. But cruise line activity created jobs in the wider economy, with a total of 9,855 jobs created through direct, indirect, and induced effects. Most of these jobs (72%) were created via passenger spend and related activities.

**Fig. 59. Cruise industry employment in Alaska, 2022 (number of jobs)**



Source: Oxford Economics

**Fig. 60. Composition of cruise industry employment and impact channel in Alaska, 2022 (number of jobs)**



Source: Oxford Economics

### 3.6.4 Summary of Impacts

Fig. 61. Summary of cruise industry activity and impacts in Alaska, 2022

	Direct Cruise Line Employment	Alaska	United States
<b>Passengers (000s)</b>	Transit	4,121	6,260
	Embark	91	10,137
	Debark	93	9,950
	<b>Total passengers</b>	<b>4,304</b>	<b>26,348</b>
<b>Spend (\$ Millions)</b>	Passengers	603	5,285
	Cruise line purchases	436	14,921
	Shipbuilding	-	170
	Staff income	1	1,262
	<b>Total spend</b>	<b>1,039</b>	<b>21,639</b>
<b>Output (\$ Millions)</b>	Direct	962	21,252
	Indirect and induced	677	29,081
	<b>Total output</b>	<b>1,638</b>	<b>50,333</b>
<b>GDP (\$ Millions)</b>	Direct	547	11,055
	Indirect and induced	407	16,684
	<b>Total GDP</b>	<b>955</b>	<b>27,740</b>
<b>Employment (000s)</b>	Direct (expenditure linked)	7	98
	Direct (cruise line employment)	0	19
	Indirect and Induced	3	112
	<b>Total employment</b>	<b>10</b>	<b>229</b>

Source: Oxford Economics

In 2022, the cruise industry generated a total output impact of **\$1.6 billion** in Alaska, including **\$1.0 billion** in direct output and **\$0.7 billion** in indirect and induced output.



### 3.7 NEW JERSEY

In 2022, the cruise industry supported 4,900 jobs and generated a total output impact of \$1.3 billion in New Jersey.

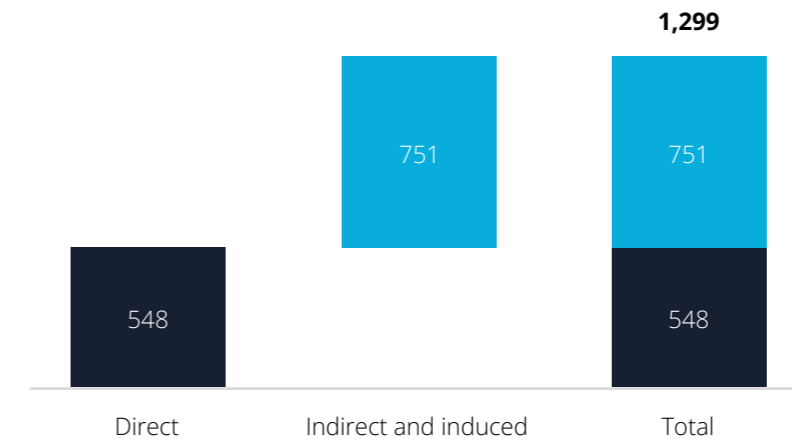
More than 290,000 New Jersey residents cruised in 2022, with most (65%) of them traveling to the Caribbean. The port of Bayonne, used by Royal Caribbean Group brands, is a getaway to Bermuda and the Caribbean.

In 2022, New Jersey's cruise industry supported almost **4,900 jobs** and generated a total output of **\$1.3 billion**.

### 3.7.1 Output

In New Jersey, activities related to the cruise industry's presence generated a total output impact of \$1.3 billion in 2022. Of this, \$548 million was generated directly, with the remaining output (\$751 million) coming through indirect and induced effects.

Fig. 62. Cruise industry output in New Jersey, 2022 (\$ millions)

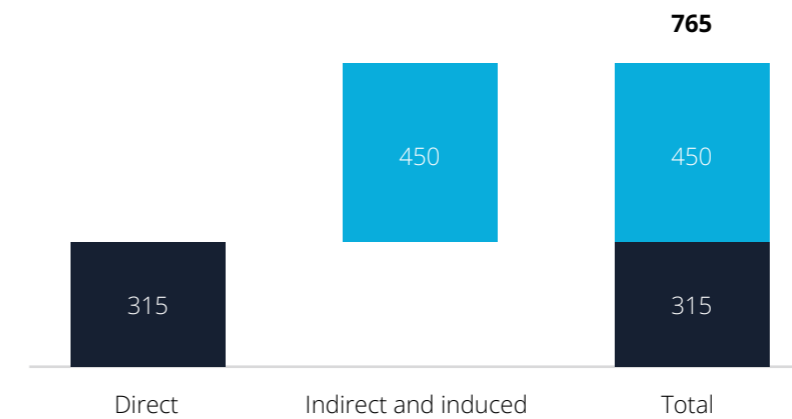


Source: Oxford Economics

### 3.7.2 GDP

Total GDP generated by the cruise industry equated to \$765 million, of which \$315 million came through direct effects and an additional \$450 million coming through indirect and induced effects.

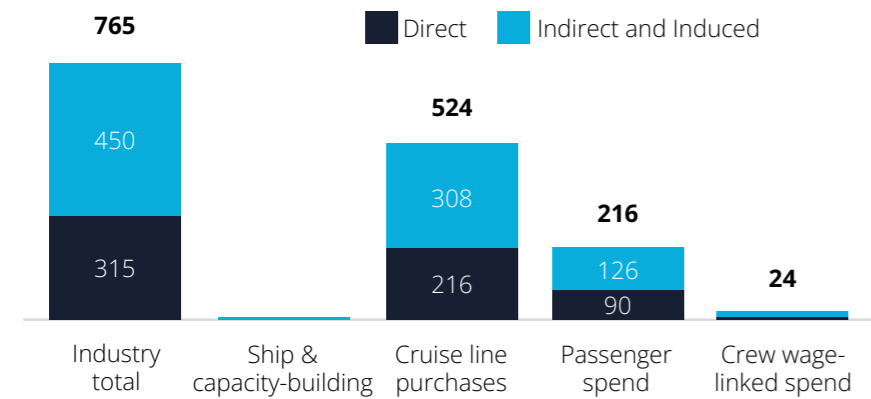
Fig. 63. Cruise industry GDP in New Jersey, 2022 (\$ millions)



Source: Oxford Economics

The cruise industry's impact on the New Jersey economy was delivered through three key activities: cruise line purchases, on-shore passenger spending, and the wage-linked spending of crew that reside in New Jersey. Cruise line purchases contributed \$524 million to GDP, while passenger spend added a further \$216 million. Crew wage-linked spend made modest contributions of around \$24 million. Ship- and capacity-building activities were not significant.

**Fig. 64. Composition of cruise industry GDP and impact channel in New Jersey, 2022 (\$ millions)**



Source: Oxford Economics

**Fig. 65. Cruise industry GDP in New Jersey versus other US states, 2022**

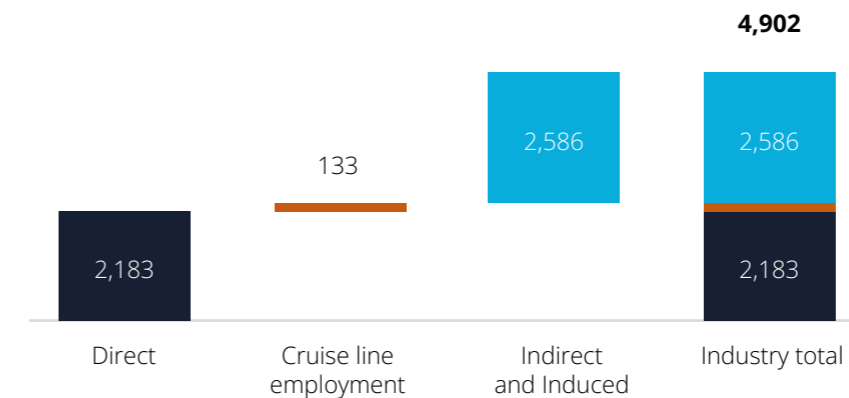
Rank	State	Total GDP (\$ mn)	% US Total
1	Florida	10,098	36.4%
2	California	3,315	12.0%
3	Texas	2,336	8.4%
4	Washington	1,688	6.1%
5	New York	1,114	4.0%
6	Alaska	955	3.4%
7	<b>New Jersey</b>	<b>765</b>	<b>2.8%</b>
8	Louisiana	626	2.3%
9	Georgia	467	1.7%
10	Pennsylvania	407	1.5%
	<b>United States</b>	<b>27,740</b>	<b>100.0%</b>

Source: Oxford Economics

### 3.7.3 Employment

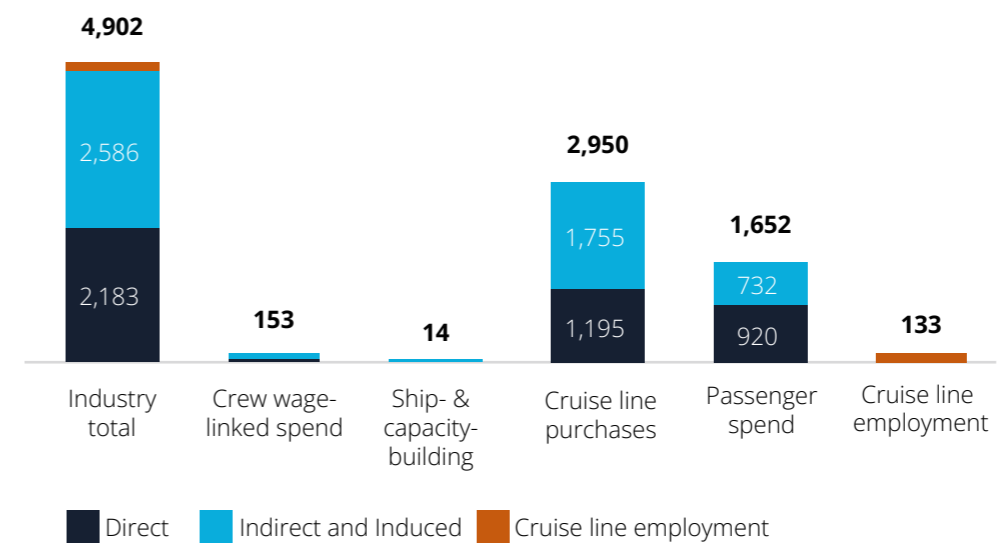
Cruise line employment (i.e., employees based on cruise ships and cruise line office staff) delivered a small number of jobs (133 in 2022). However cruise line activity also created jobs in the wider economy, with a total of 4,769 jobs created through direct, indirect, and induced effects. Most of these jobs (60%) were created via cruise line purchases and related activities.

**Fig. 66. Cruise industry employment in New Jersey, 2022 (number of jobs)**



Source: Oxford Economics

**Fig. 67. Composition of cruise industry employment and impact channel in New Jersey, 2022 (number of jobs)**



Source: Oxford Economics

### 3.7.4 Summary of Impacts

Fig. 68. Summary of cruise industry activity and impacts in New Jersey, 2022

	Direct Cruise Line Employment	New Jersey	United States
<b>Passengers (000s)</b>	Transit	3	6,260
	Embark	327	10,137
	Debark	327	9,950
	<b>Total passengers</b>	<b>656</b>	<b>26,348</b>
<b>Spend (\$ Millions)</b>	Passengers	148	5,285
	Cruise line purchases	377	14,921
	Shipbuilding	-	170
	Staff income	2	1,262
	<b>Total spend</b>	<b>528</b>	<b>21,639</b>
<b>Output (\$ Millions)</b>	Direct	548	21,252
	Indirect and induced	751	29,081
	<b>Total output</b>	<b>1,299</b>	<b>50,333</b>
<b>GDP (\$ Millions)</b>	Direct	315	11,055
	Indirect and induced	450	16,684
	<b>Total GDP</b>	<b>765</b>	<b>27,740</b>
<b>Employment (000s)</b>	Direct (expenditure linked)	2	98
	Direct (cruise line employment)	0	19
	Indirect and Induced	3	112
	<b>Total employment</b>	<b>5</b>	<b>229</b>

Source: Oxford Economics

In 2022, the cruise industry generated a total output impact of **\$1.3 billion** in New Jersey, including **\$548 million** in direct output and **\$751 million** in indirect and induced output.



### 3.8 LOUISIANA

In 2022, the cruise industry supported more than 6,400 jobs and generated a total output impact of \$1.26 billion in Louisiana.

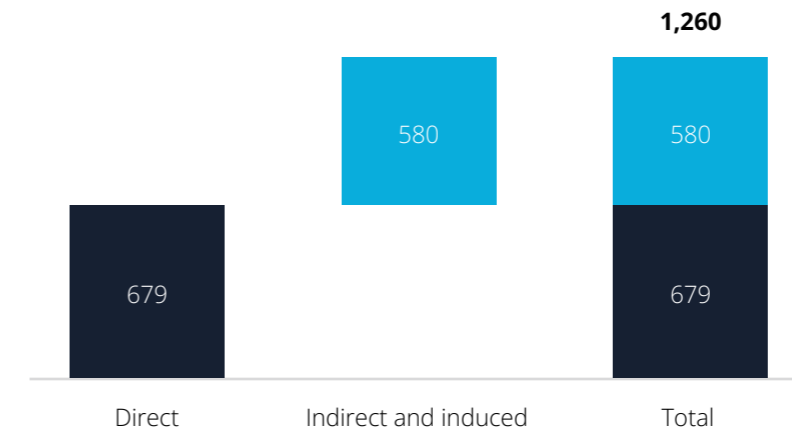
The port of New Orleans in Louisiana is a key turnaround port servicing itineraries to the Western Caribbean. Close to 470,000 cruisers embarked on a cruise from New Orleans in 2022.

In 2022, Louisiana's cruise industry supported more than **6,400 jobs** and generated a total output of **\$1.3 billion**.

#### 3.8.1 Output

In Louisiana, activities related to the cruise industry's presence generated a total output impact of \$1.26 billion in 2022. Of this, \$679 million was generated directly, with the remaining output (\$580 million) coming through indirect and induced effects.

Fig. 69. Cruise industry output in Louisiana, 2022 (\$ millions)

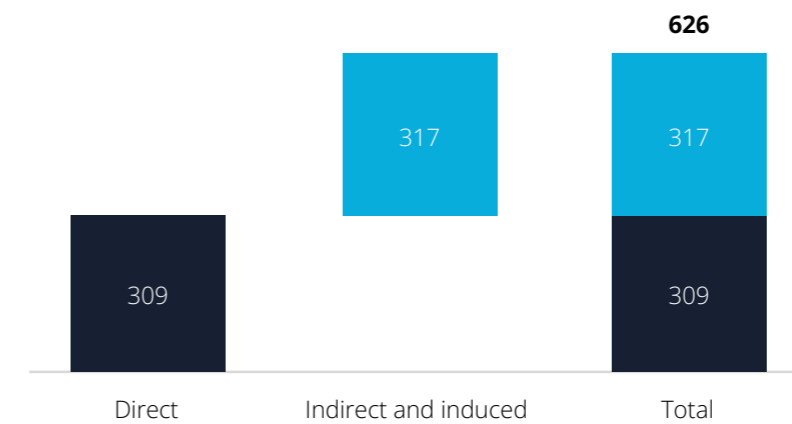


Source: Oxford Economics

#### 3.8.2 GDP

Total GDP generated by the cruise industry equated to \$626 million, of which \$309 million came through direct effects and an additional \$317 million coming through indirect and induced effects.

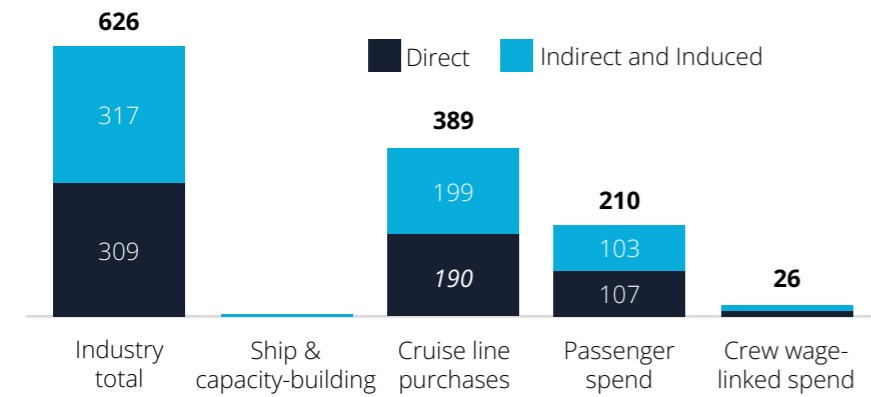
Fig. 70. Cruise industry GDP in Louisiana, 2022 (\$ millions)



Source: Oxford Economics

The cruise industry's impact on the Louisiana economy was delivered through three key activities: cruise line purchases, on-shore passenger spending, and the wage-linked spending of crew that reside in Louisiana. Cruise line purchases contributed \$389 million to GDP, while passenger spend an additional \$210 million. Crew wage-linked spend contributed less at \$26 million. Ship- and capacity-building activities were not significant.

**Fig. 71. Composition of cruise industry GDP and impact channel in Louisiana, 2022 (\$ millions)**



Source: Oxford Economics

**Fig. 72. Cruise industry GDP in Louisiana versus other US states, 2022**

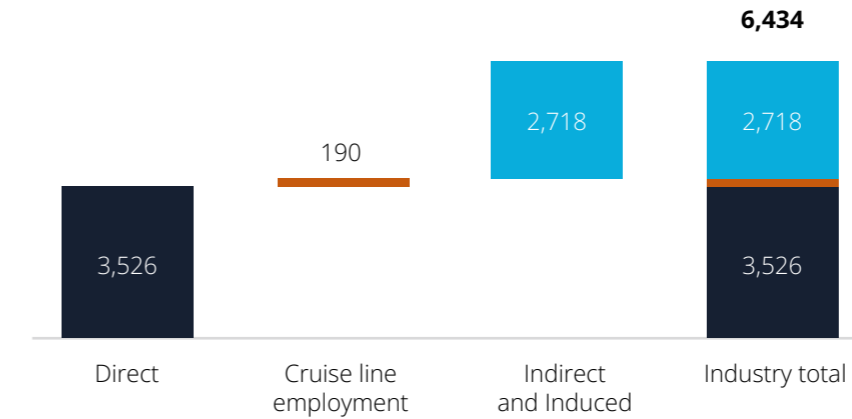
Rank	State	Total GDP (\$ mn)	% US Total
1	Florida	10,098	36.4%
2	California	3,315	12.0%
3	Texas	2,336	8.4%
4	Washington	1,688	6.1%
5	New York	1,114	4.0%
6	Alaska	955	3.4%
7	New Jersey	765	2.8%
8	<b>Louisiana</b>	<b>626</b>	<b>2.3%</b>
9	Georgia	467	1.7%
10	Pennsylvania	407	1.5%
	<b>United States</b>	<b>27,740</b>	<b>100.0%</b>

Source: Oxford Economics

### 3.8.3 Employment

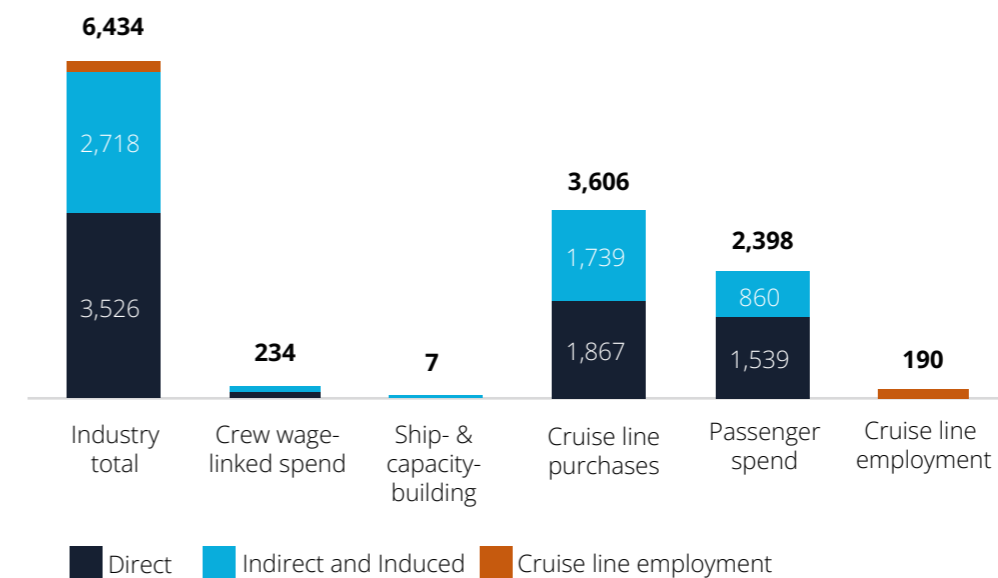
Cruise line employment (i.e., employees based on cruise ships and cruise line office staff) delivered a 190 direct jobs in 2022. Cruise line activity also created jobs in the wider economy, with a total of 6,244 jobs created through direct, indirect, and induced effects. Most of these jobs (56%) were created via cruise line purchases and related activities.

**Fig. 73. Cruise industry employment in Louisiana, 2022 (number of jobs)**



Source: Oxford Economics

**Fig. 74. Composition of cruise industry employment and impact channel in Louisiana, 2022 (number of jobs)**



Source: Oxford Economics

### 3.8.4 Summary of Impacts

Fig. 75. Summary of cruise industry activity and impacts in Louisiana, 2022

	Direct Cruise Line Employment	Louisiana	United States
<b>Passengers (000s)</b>	Transit	4	6,260
	Embark	466	10,137
	Debark	461	9,950
	<b>Total passengers</b>	<b>931</b>	<b>26,348</b>
<b>Spend (\$ Millions)</b>	Passengers	195	5,285
	Cruise line purchases	446	14,921
	Shipbuilding	-	170
	Staff income	3	1,262
	<b>Total spend</b>	<b>644</b>	<b>21,639</b>
<b>Output (\$ Millions)</b>	Direct	679	21,252
	Indirect and induced	580	29,081
	<b>Total output</b>	<b>1,260</b>	<b>50,333</b>
<b>GDP (\$ Millions)</b>	Direct	309	11,055
	Indirect and induced	317	16,684
	<b>Total GDP</b>	<b>626</b>	<b>27,740</b>
<b>Employment (000s)</b>	Direct (expenditure linked)	4	98
	Direct (cruise line employment)	0	19
	Indirect and Induced	3	112
	<b>Total employment</b>	<b>6</b>	<b>229</b>

Source: Oxford Economics



In 2022, the cruise industry generated a total output impact of **\$1.3 billion** in Louisiana, including **\$679 million** in direct output and **\$580 million** in indirect and induced output.

### 3.9 GEORGIA

In 2022, the cruise industry supported more than 3,000 jobs and generated a total output impact of \$874 million in Georgia.

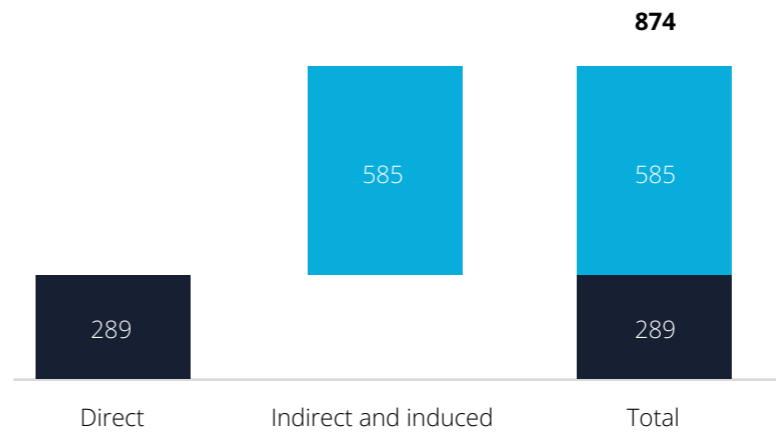
Close to 490,000 Georgia residents cruised in 2022, while 84% of them traveling to the Caribbean due to easy access to multiple ports in nearby states.

In 2022, Georgia's cruise industry supported more than **3,000 jobs** and generated a total output of **\$874 million**.

#### 3.9.1 Output

In Georgia, activities related to the cruise industry's presence generated a total output impact of \$874 million in 2022. Of this, \$289 million was generated directly, with the remaining output (\$585 million) coming through indirect and induced effects.

Fig. 76. Cruise industry output in Georgia, 2022 (\$ millions)

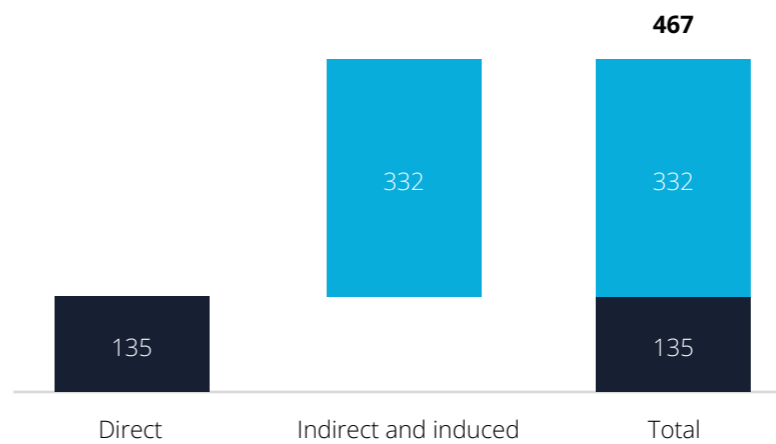


Source: Oxford Economics

#### 3.9.2 GDP

Total GDP generated by the cruise industry equated to \$467 million, of which \$135 million came through direct effects and an additional \$332 million coming through indirect and induced effects.

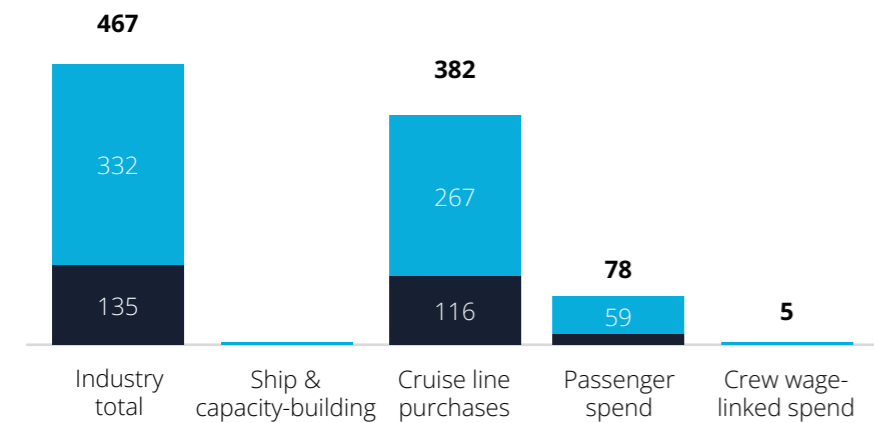
Fig. 77. Cruise industry GDP in Georgia, 2022 (\$ millions)



Source: Oxford Economics

The cruise industry's impact on the Georgia economy was delivered through three key activities: cruise line purchases, on-shore passenger spending, and the wage-linked spending of crew that reside in Georgia. Cruise line purchases contributed \$382 million to GDP, or 82% of total GDP impacts. Passenger spend added a further \$78 million to this, while crew wage-linked spend made modest contributions of \$5 million. Ship- and capacity-building activities were not significant.

**Fig. 78. Composition of cruise industry GDP and impact channel in Georgia, 2022 (\$ millions)**



Source: Oxford Economics

**Fig. 79. Cruise industry GDP in Georgia versus other US states, 2022**

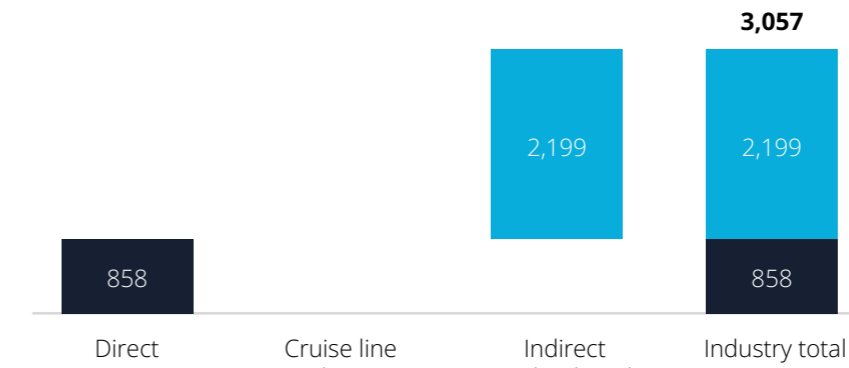
Rank	State	Total GDP (\$ mn)	% US Total
1	Florida	10,098	36.4%
2	California	3,315	12.0%
3	Texas	2,336	8.4%
4	Washington	1,688	6.1%
5	New York	1,114	4.0%
6	Alaska	955	3.4%
7	New Jersey	765	2.8%
8	Louisiana	626	2.3%
9	<b>Georgia</b>	<b>467</b>	<b>1.7%</b>
10	Pennsylvania	407	1.5%
	<b>United States</b>	<b>27,740</b>	<b>100.0%</b>

Source: Oxford Economics

### 3.9.3 Employment

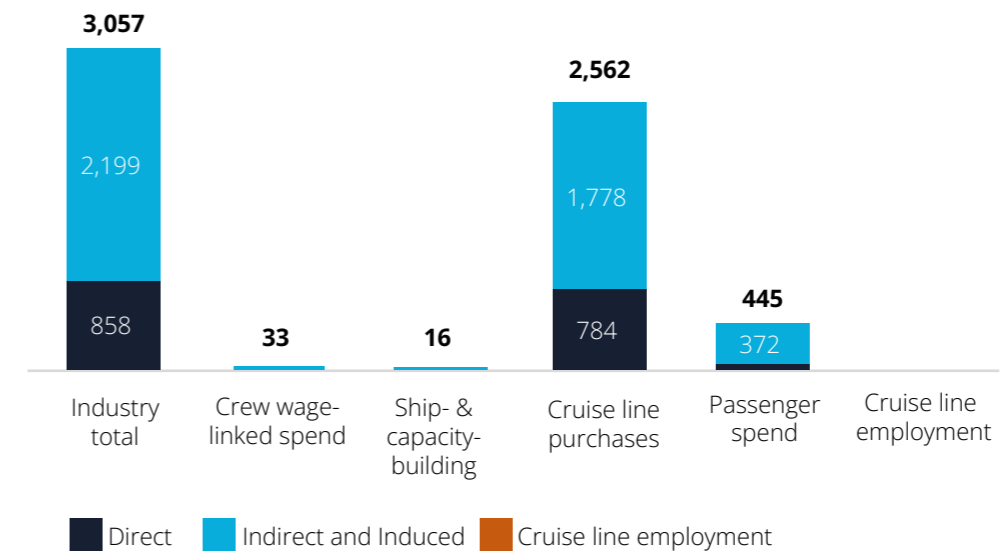
Cruise line employment (i.e., employees based on cruise ships and cruise line office staff) delivered a negligible number of jobs in 2022. But cruise line activity created jobs in the wider economy, with a total of 3,050 jobs supported through direct, indirect, and induced effects. Most of these jobs (84%) were created via cruise line purchases and related activities.

**Fig. 80. Cruise industry employment in Georgia, 2022 (number of jobs)**



Source: Oxford Economics

**Fig. 81. Composition of cruise industry employment and impact channel in Georgia, 2022 (number of jobs)**



Source: Oxford Economics

### 3.9.4 Summary of Impacts

Fig. 82. Summary of cruise industry activity and impacts in Georgia, 2022

	Direct Cruise Line Employment	Georgia	United States
<b>Passengers (000s)</b>	Transit	-	6,260
	Embark	-	10,137
	Debark	-	9,950
	<b>Total passengers</b>	<b>-</b>	<b>26,348</b>
<b>Spend (\$ Millions)</b>	Passengers	38	5,285
	Cruise line purchases	206	14,921
	Shipbuilding	-	170
	Staff income	-	1,262
	<b>Total spend</b>	<b>244</b>	<b>21,639</b>
<b>Output (\$ Millions)</b>	Direct	289	21,252
	Indirect and induced	585	29,081
	<b>Total output</b>	<b>874</b>	<b>50,333</b>
<b>GDP (\$ Millions)</b>	Direct	135	11,055
	Indirect and induced	332	16,684
	<b>Total GDP</b>	<b>467</b>	<b>27,740</b>
<b>Employment (000s)</b>	Direct (expenditure linked)	1	98
	Direct (cruise line employment)	-	19
	Indirect and Induced	2	112
	<b>Total employment</b>	<b>3</b>	<b>229</b>

Source: Oxford Economics



In 2022, the cruise industry generated a total output impact of **\$874 million** in Georgia, including **\$289 million** in direct output and **\$585 million** in indirect and induced output.

### 3.10 PENNSYLVANIA

In 2022, the cruise industry supported nearly 2,300 jobs and generated a total output impact of \$720 million in Pennsylvania. Most of these impacts came through indirect and induced channels of activity.

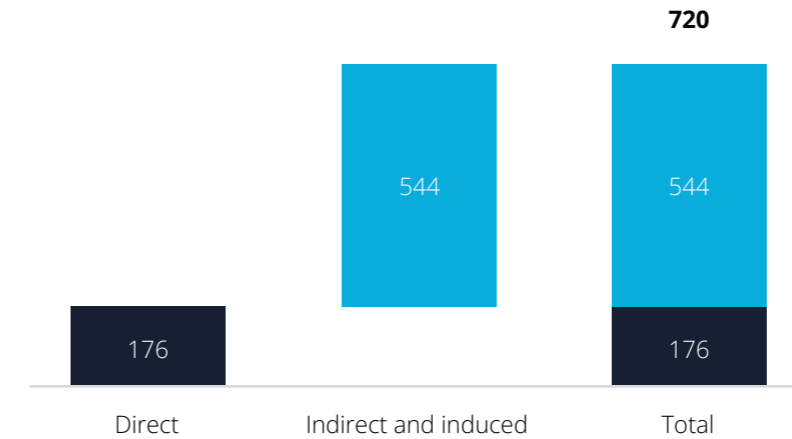
Nearly 300,000 residents from Pennsylvania cruised in 2022. Most of these (68%) traveled to the Caribbean while another 14% sailed to other cruise regions in the US. The rest (18%) sailed in other regions of the world.

In 2022, Pennsylvania's cruise industry supported nearly **2,300 jobs** and generated a total output of **\$720 million**.

#### 3.10.1 Output

In Pennsylvania, activities related to the cruise industry's presence generated a total output impact of \$720 million in 2022. Of this, \$176 million was generated directly, with the remaining output (\$544 million) coming through indirect and induced effects.

Fig. 83. Cruise industry output in Pennsylvania, 2022 (\$ millions)

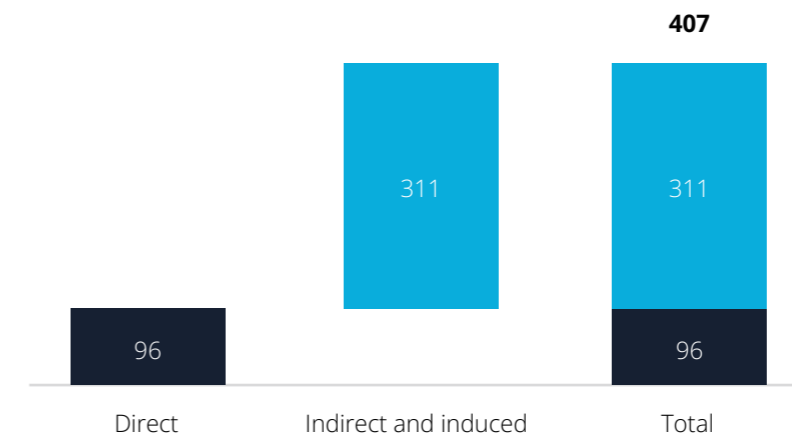


Source: Oxford Economics

#### 3.10.2 GDP

Total GDP generated by the cruise industry equated to \$407 million, of which \$96 million came through direct effects and an additional \$311 million coming through indirect and induced effects.

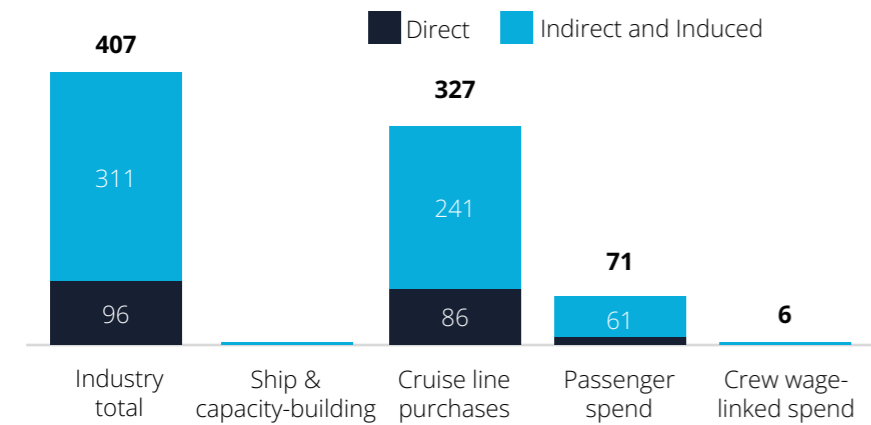
Fig. 84. Cruise industry GDP in Pennsylvania, 2022 (\$ millions)



Source: Oxford Economics

The cruise industry's impact on the Pennsylvania economy was delivered through three key activities: cruise line purchases, on-shore passenger spending, and the wage-linked spending of crew that reside in Pennsylvania. Cruise line purchases contributed \$327 million to GDP, while passenger spend added a further \$71 million. Crew wage-linked spend made a smaller contribution estimated at \$6 million. Ship- and capacity-building activities were not significant.

**Fig. 85. Composition of cruise industry GDP and impact channel in Pennsylvania, 2022 (\$ millions)**



Source: Oxford Economics

**Fig. 86. Cruise industry GDP in Pennsylvania versus other US states, 2022**

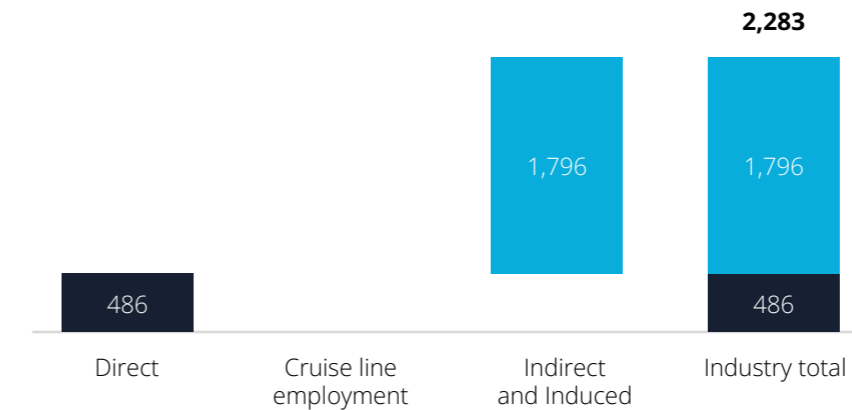
Rank	State	Total GDP (\$ mn)	% US Total
1	Florida	10,098	36.4%
2	California	3,315	12.0%
3	Texas	2,336	8.4%
4	Washington	1,688	6.1%
5	New York	1,114	4.0%
6	Alaska	955	3.4%
7	New Jersey	765	2.8%
8	Louisiana	626	2.3%
9	Georgia	467	1.7%
10	<b>Pennsylvania</b>	<b>407</b>	<b>1.5%</b>
	<b>United States</b>	<b>27,740</b>	<b>100.0%</b>

Source: Oxford Economics

### 3.10.3 Employment

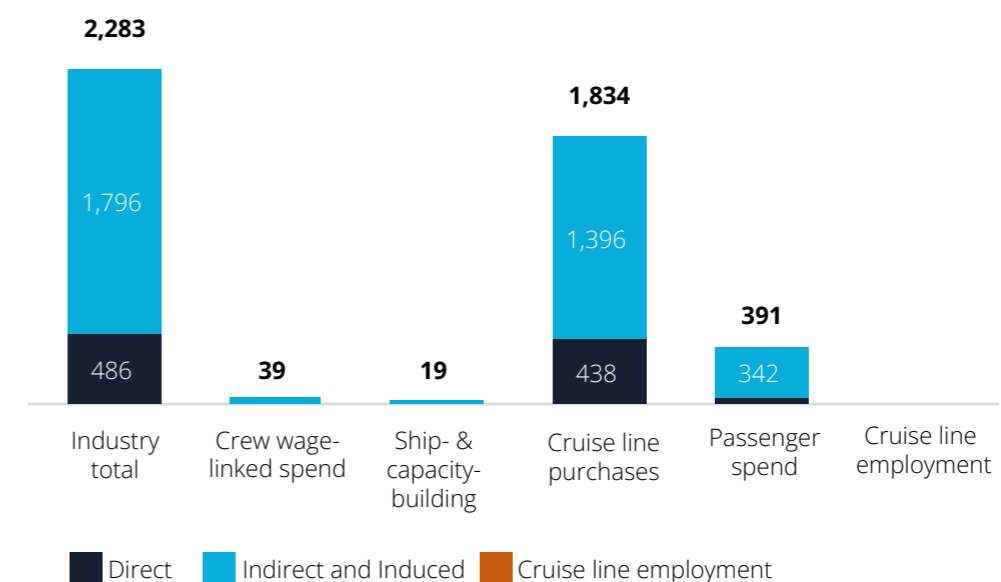
Cruise line employment (i.e., employees based on cruise ships and cruise line office staff) delivered a negligible number of jobs in 2022. But cruise line activity created jobs in the wider economy, with a total of 2,283 jobs created through direct, indirect, and induced effects. Most of these jobs (80%) were created via cruise line purchases and related activities.

**Fig. 87. Cruise industry employment in Pennsylvania, 2022 (number of jobs)**



Source: Oxford Economics

**Fig. 88. Composition of cruise industry employment and impact channel in Pennsylvania, 2022 (number of jobs)**



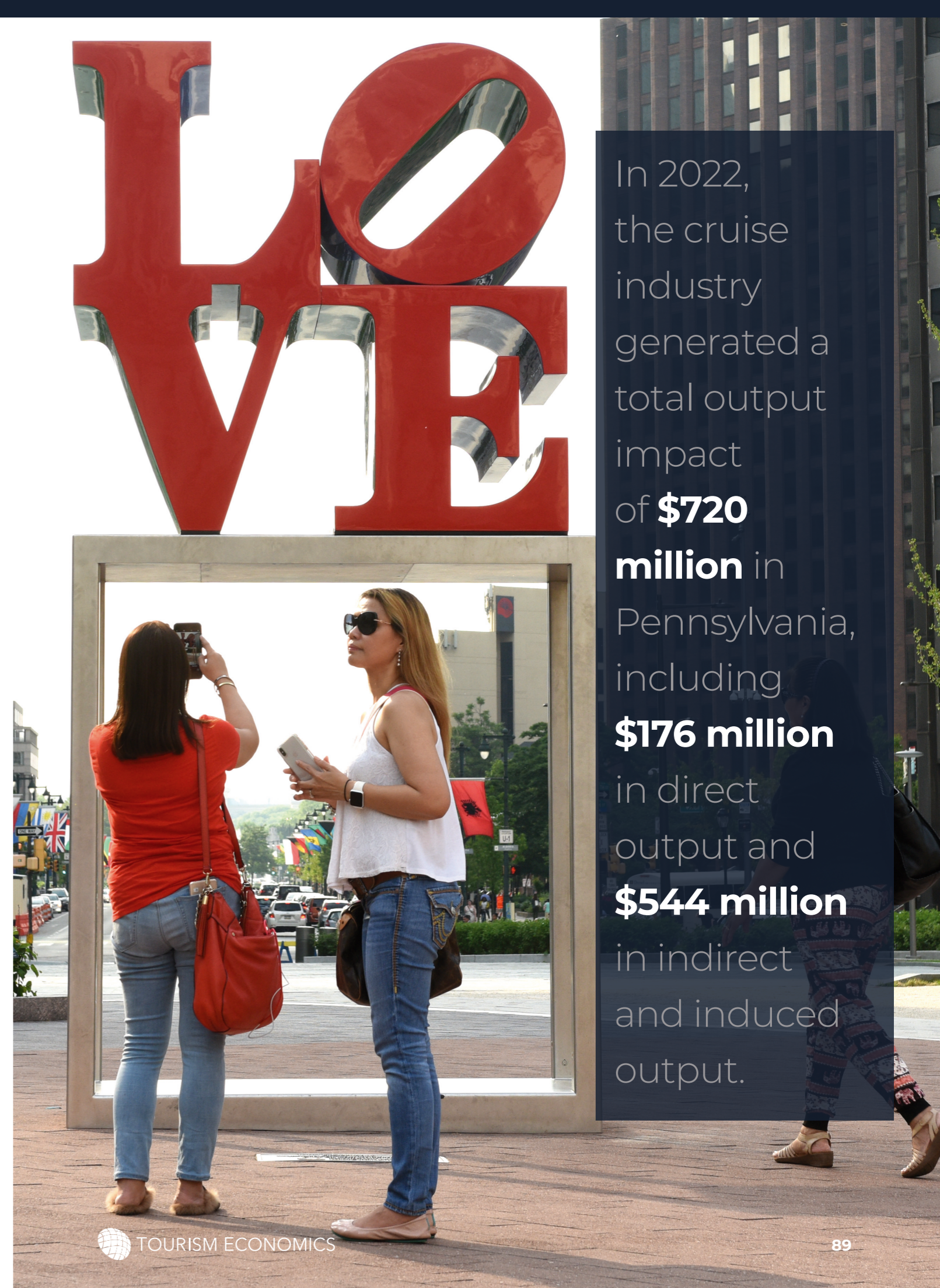
Source: Oxford Economics

### 3.10.4 Summary of Impacts

Fig. 89. Summary of cruise industry activity and impacts in Pennsylvania, 2022

	Direct Cruise Line Employment	Pennsylvania	United States
<b>Passengers (000s)</b>	Transit	-	6,260
	Embark	-	10,137
	Debark	-	9,950
	<b>Total passengers</b>	-	<b>26,348</b>
<b>Spend (\$ Millions)</b>	Passengers	23	5,285
	Cruise line purchases	126	14,921
	Shipbuilding	-	170
	Staff income	-	1,262
	<b>Total spend</b>	<b>149</b>	<b>21,639</b>
<b>Output (\$ Millions)</b>	Direct	176	21,252
	Indirect and induced	544	29,081
	<b>Total output</b>	<b>720</b>	<b>50,333</b>
<b>GDP (\$ Millions)</b>	Direct	96	11,055
	Indirect and induced	311	16,684
	<b>Total GDP</b>	<b>407</b>	<b>27,740</b>
<b>Employment (000s)</b>	Direct (expenditure linked)	0	98
	Direct (cruise line employment)	-	19
	Indirect and Induced	2	112
	<b>Total employment</b>	<b>2</b>	<b>229</b>

Source: Oxford Economics



In 2022, the cruise industry generated a total output impact of **\$720 million** in Pennsylvania, including **\$176 million** in direct output and **\$544 million** in indirect and induced output.

### 3.11 SUMMARY OF ALL STATES

Fig. 90. Summary impacts of cruise industry activity across all US states

		Total Output (\$ mn)	Total GDP (\$ mn)	Total Employment (000s)
1	Florida	18,268	10,098	106.1
2	California	5,754	3,315	19.0
3	Texas	4,467	2,336	17.4
4	Washington	2,836	1,688	12.4
5	New York	1,872	1,114	5.4
6	Alaska	1,638	955	9.9
7	New Jersey	1,299	765	4.9
8	Louisiana	1,260	626	6.4
9	Georgia	874	467	3.1
10	Pennsylvania	720	407	2.3
11	South Carolina	720	382	3.5
12	Illinois	697	381	2.1
13	North Carolina	696	354	2.5
14	Massachusetts	648	363	2.2
15	Ohio	626	324	2.2
16	Virginia	611	326	2.1
17	Maryland	604	332	2.4
18	Michigan	487	254	1.8
19	Hawaii	445	252	2.3
20	Arizona	445	232	1.5
21	Tennessee	443	230	1.5
22	Alabama	435	213	2.0
23	Colorado	360	189	1.1
24	Indiana	334	170	1.2
25	Missouri	317	166	1.2
26	Minnesota	296	161	1.0

27	Utah	294	141	1.0
28	Wisconsin	255	135	0.9
29	Oregon	237	123	0.8
30	Connecticut	233	128	0.6
31	Nevada	216	118	0.7
32	Kentucky	215	106	0.8
33	Oklahoma	203	103	0.8
34	Maine	186	104	1.0
35	Arkansas	151	73	0.6
36	Kansas	141	72	0.5
37	Mississippi	137	62	0.6
38	Iowa	130	68	0.5
39	District of Columbia	98	55	0.2
40	Nebraska	89	46	0.3
41	Idaho	85	42	0.3
42	New Hampshire	82	45	0.3
43	New Mexico	73	37	0.3
44	Delaware	68	36	0.2
45	Rhode Island	65	34	0.2
46	West Virginia	65	31	0.3
47	Montana	38	20	0.1
48	South Dakota	38	20	0.1
49	North Dakota	33	18	0.1
50	Vermont	27	14	0.1
51	Wyoming	23	12	0.1
<b>United States</b>		<b>50,333</b>	<b>27,740</b>	<b>228.7</b>

Source: Oxford Economics

# ABOUT THE RESEARCH TEAM



Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modelling to UK companies and financial institutions expanding abroad. Since then, we have become one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on more than 200 countries, 100 industrial sectors, and 8,000 cities and regions. Our best-in-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact.

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