



# Economic Contribution of Cruise Tourism to Canada 2023

REPORT PRODUCED FOR CLIA BY TOURISM ECONOMICS  
January 2025



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## January 2025

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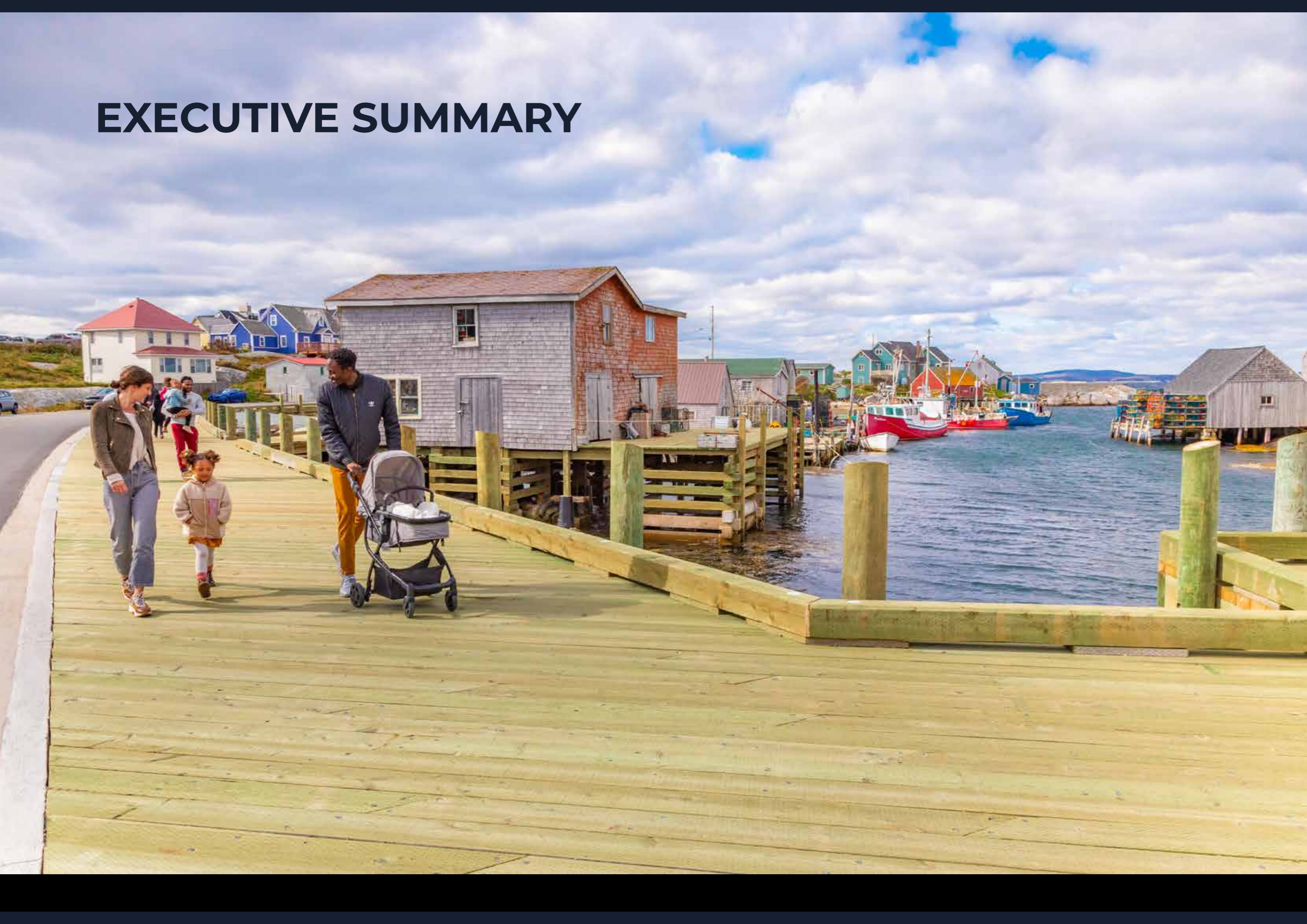
The modelling and results presented here are based on information provided by third parties, upon which Oxford Economics has relied in producing its report and forecasts in good faith. Any subsequent revision or update of those data will affect the assessments and projections shown.

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# EXECUTIVE SUMMARY



## THE CRUISE INDUSTRY IN 2023

In 2023, the global cruise industry experienced record activity, marking its first year of full recovery from the pandemic. Overall occupancy rates improved throughout the year, approaching pre-COVID levels by the second quarter of 2023. As a result, a record 31.7 million passengers embarked on cruises in 2023, representing a 55% increase from 2022 and a 7% increase compared to 2019. This growth was fuelled by strong demand for cruise vacations accompanied by an increased capacity. This included the introduction of new vessels, including the largest ever built, which helped attract a broader audience.

In Canada, the cruise industry rebounded sharply in 2023, leading to a record number of passenger visits and a corresponding economic impact. Canada offers multiple itinerary options and is home to two important cruise regions, Alaska/British Columbia and Canada/New England, representing 5.8% and 2.5% of global deployment, respectively, in 2023.

Cruise Lines International Association (CLIA) recently commissioned Oxford Economics to assess the economic contribution of cruise activity in Canada in 2023.

## How does the Cruise Industry Generate Economic Impact?

We assess the economic contribution of cruise tourism 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 expenditure directly linked to the cruise industry. This includes visitor spending at ports, 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

The cruise industry's activities in Canada in 2023 yielded significant economic benefits, supporting:



**CAD\$5.2bn**

worth of total economic output



**CAD\$2.7bn**

worth of gross domestic product (GDP)



**23,700**

total jobs



**CAD\$1.3bn**

worth of wages

**Fig. 1. Summary of cruise industry activity, 2023**

	Direct Expenditure	Direct Cruise Line Employment	Indirect & Induced	Total
Output (CAD\$ millions)	2,609	-	2,615	5,224
GDP (CAD\$ millions)	1,294	-	1,406	2,699
Employment (000s)	14	1	9	24
Wages (CAD\$ millions)	614	22	644	1,280

Source: Oxford Economics.

**Fig. 2. Summary of cruise industry activity in Canada and globally, 2023<sup>1</sup>**

		Canada	Global
<b>Passenger flows (000s)</b>	Transit visits	2,138	101,149
	Embark	681	31,391
	Debark	677	31,274
	<b>Total cruise visits</b>	<b>3,496</b>	<b>163,814</b>
<b>Spend (CAD\$ millions)</b>	Passengers	775	29,623
	Cruise line purchases	1,780	52,778
	Shipbuilding	28	13,150
	Staff income	21	10,782
	<b>Total spend</b>	<b>2,604</b>	<b>106,333</b>
<b>Output (CAD\$ millions)</b>	Direct	2,609	102,969
	Indirect & Induced	2,615	124,648
	<b>Total output</b>	<b>5,224</b>	<b>227,617</b>
<b>GDP (CAD\$ millions)</b>	Direct	1,294	49,812
	Indirect & Induced	1,406	65,784
	<b>Total GDP</b>	<b>2,699</b>	<b>115,596</b>
<b>Employment (000s)</b>	Direct (expenditure linked)	14	663
	Direct (cruise line employment)	1	360
	Indirect & Induced	9	568
	<b>Total employment</b>	<b>24</b>	<b>1,591</b>

Source: Oxford Economics.



# INTRODUCTION



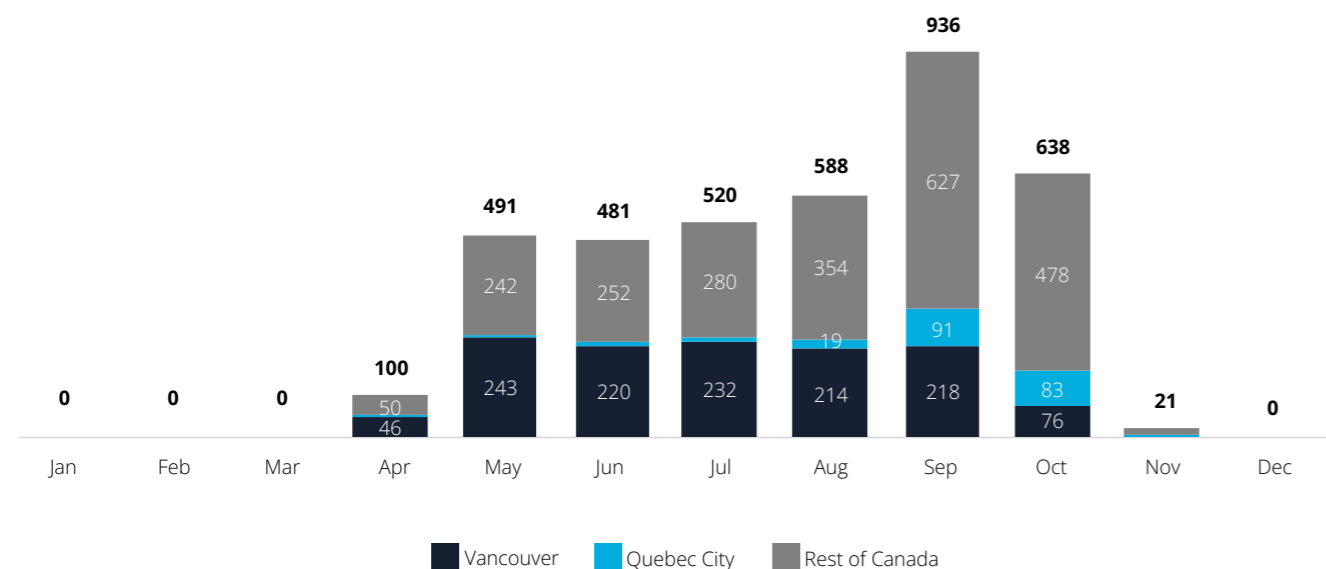
# INTRODUCTION

In 2023, the global cruise industry experienced record activity, marking its first year of full recovery from the pandemic. Overall occupancy rates improved throughout the year, approaching pre-COVID levels by the second quarter of 2023. As a result, a record 31.7 million passengers cruised in 2023, representing a 55% increase from 2022 and a 7% increase compared to 2019. This growth was fuelled by strong demand for cruise vacations accompanied by an increased capacity. This included the introduction of new vessels, including the largest ever built, which helped attract a broader audience.

In Canada, the cruise industry rebounded sharply in 2023, leading to a record number of passenger visits and a corresponding economic impact. Canada offers multiple itinerary options and is home to two important cruise regions, Alaska/British Columbia and Canada/New England, representing 5.8% and 2.5% of global deployment, respectively, in 2023.

Canadian cruise is highly seasonal, with the vast majority of port calls occurring during the warmer months, from May to October. Vancouver, Quebec, and Montreal are the main turnaround ports, while Victoria and Halifax are the leading transit ports. Vancouver on the west coast maintains a steady cruise volume during this period, while the east coast experiences a sharp peak in September and October, coinciding with the appearance of brightly coloured leaves in autumn. In 2023, the total deployment in Canada/New England reached 5.7 million Available Passenger Cruise Days (APCDs), with 47% of the volume in September and October. Notably, in 2024, PONANT introduced winter cruises in this region for the first time.

**Fig. 3. Canada Cruise Deployment in 2023, capacity at ports in passengers (000s)**



Source: Oxford Economics

Throughout 2023, cruise activity grew significantly, bringing numbers up to the record-setting 2019 performance. In this report, we examine how the various activities of the cruise sector in 2023 supported economic impacts in Canada.

## An Overview of Economic Impact Analysis

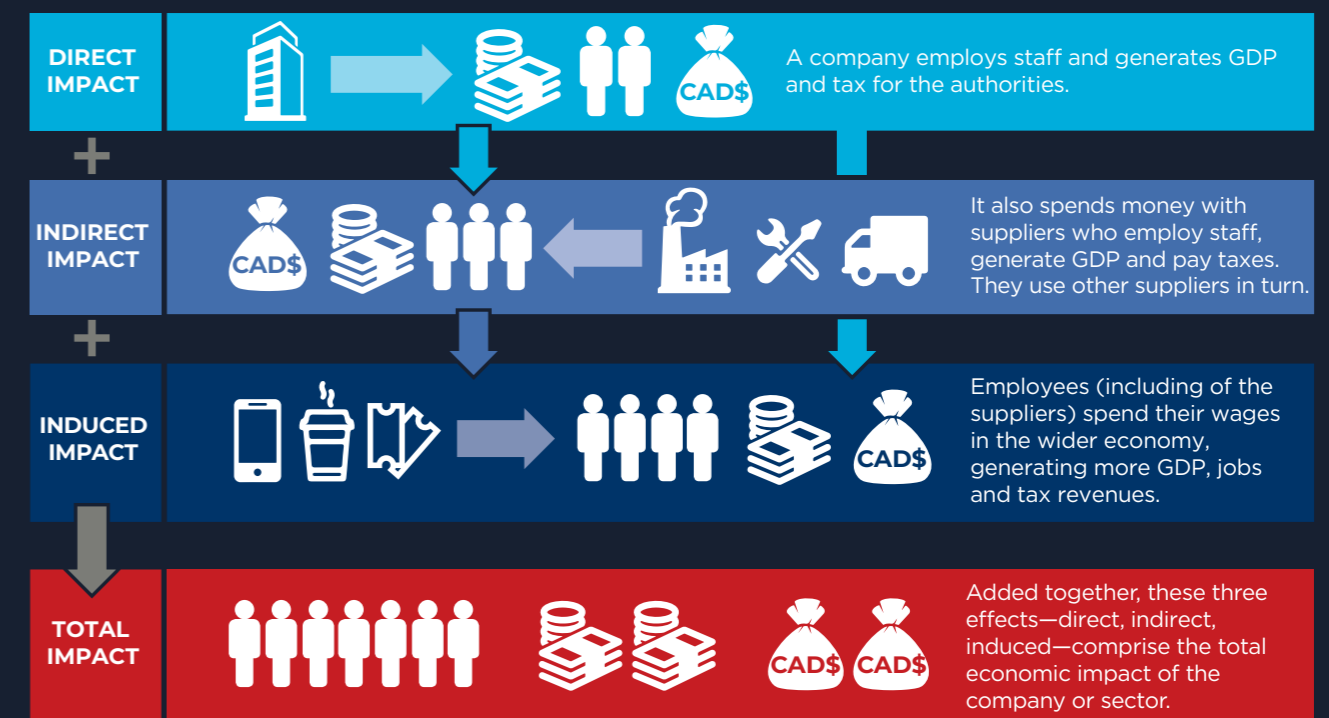
We assess the economic impact of cruise tourism in Canada using a standard approach known as an economic impact analysis that quantifies the impact of the cruise industry across three “core” channels:

- **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 the cruise tourism in Canada 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



<sup>2</sup> Source: OECD

<sup>3</sup> Source: OECD

# CRUISE INDUSTRY'S ECONOMIC IMPACT IN CANADA



# CRUISE INDUSTRY'S ECONOMIC IMPACT IN CANADA

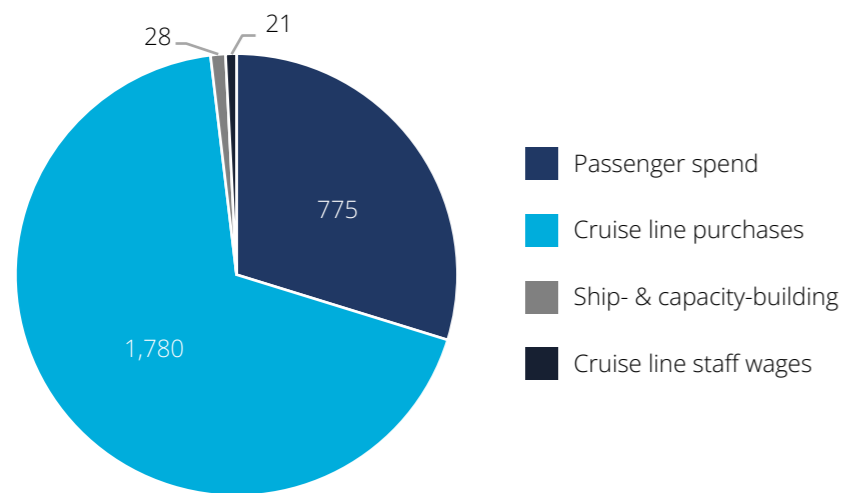
## 2.1 Direct Cruise-Linked Spending

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



Expenditure through each of these channels supports economic activity and employment throughout Canada, 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 2023, the direct impact of the cruise industry in Canada reached CAD\$ 2.6 billion.

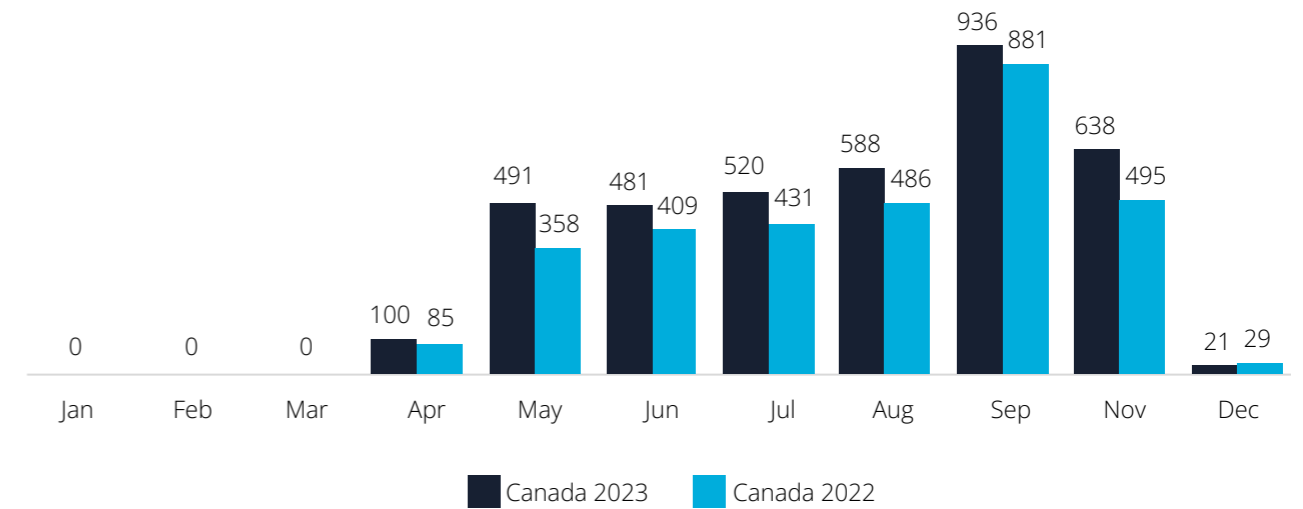
Fig. 4. Direct cruise-linked spending in Canada, 2023 (CAD\$ millions)



Source: Oxford Economics

In 2023, cruise line purchases reached CAD\$ 1.8 billion. Cruise line purchases tend to happen at embarkation and debarkation ports. Popular cruise itineraries begin and finish in Canada, but often transit in Alaska or in other Canadian ports. Therefore, cruise line purchases tend to be higher than passenger spending, vessels re-stock their supplies and fuel as they welcome a new group of guests onboard.

Fig. 5. Deployment in Canada Port Passenger Capacity Deployed, 2023 and 2022 (000s)



Source: Oxford Economics/Tourism Economics, Cruise-IP

Passenger spending reached CAD\$ 775 million in 2023, a large jump (54%) from last year driven by an overall increase in passenger numbers in the region. This figure includes spending by passengers and crew when going ashore or at embarkation ports.

Shipbuilding expenditure was CAD\$ 28 million in 2023, accounting for 1% of all direct cruise-linked spending in Canada. While Canada is not a market for shipbuilding activity, which is concentrated in Europe, there is some ship maintenance activity in the country.

In total, we estimate that cruise line staff wages in 2023 amounted to CAD\$ 21 million.<sup>4</sup> Staff wages were not as sensitive to changes in passenger numbers, as there are significant costs involved in adjusting permanent staff numbers in response to changes in passenger volume.

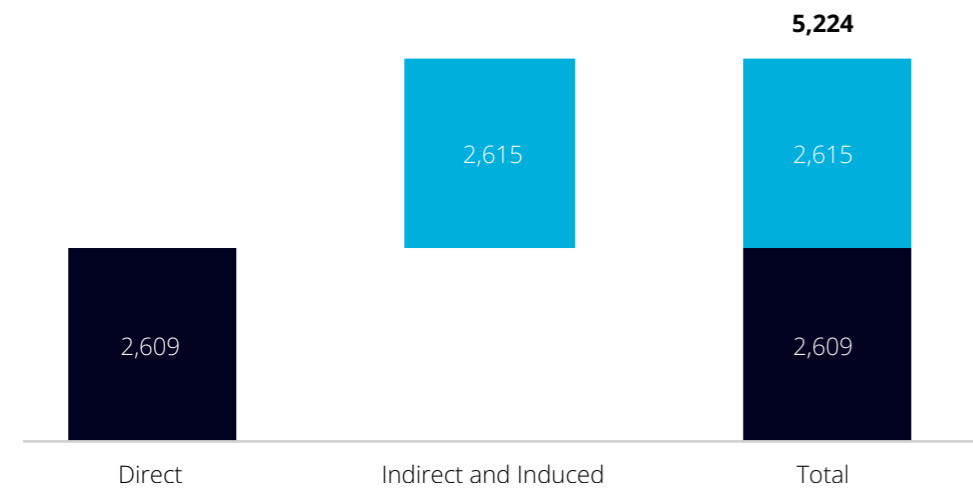
<sup>4</sup> Crew wages are their 'take-home pay', i.e. net of any income spent ashore during their embarkation period.

## 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. **Output generated by the industry directly along with ancillary impacts amounted to an estimated CAD\$ 5.2 billion in 2023.**

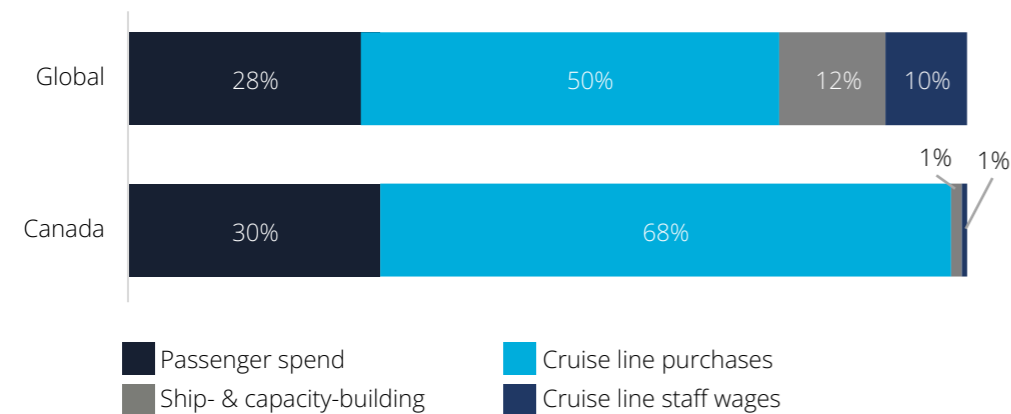
**Fig. 6. Cruise industry output in Canada, 2023 (CAD\$ millions)**



Source: Oxford Economics  
Parts may not sum to total due to rounding

Cruise line purchases represented an estimated 68% of the industry spend in Canada – when compared to a global average of 50%. Passenger spending was also higher than the global average. Cruise line purchases represent a large share of total spend because Canadian ports tend to act as embarkation points, with many of the cruises embarking in Vancouver transiting to Alaska. Ship building and related activities did not represent a significant share of the industry's spend in Canada.

**Fig. 7. Composition of cruise industry's overall spend in Canada and globally, 2023**



Source: Oxford Economics

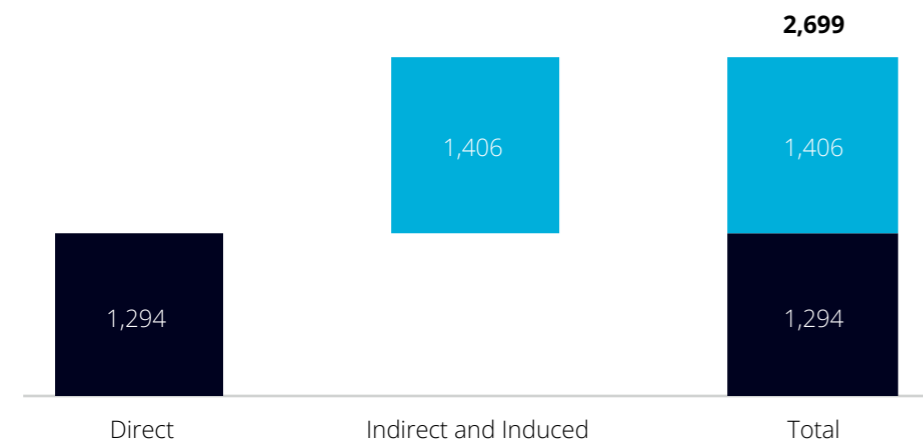


Purchases by cruise lines supported almost **68%** of the cruise industry's total economic impact in Canada. Passenger spending was also a significant factor, contributing to **30%** of total economic impact.

### 2.2.2 GDP

The cruise industry is estimated to have contributed **CAD\$ 2.7 billion in gross domestic product (GDP) to the Canadian economy in 2023**. Of this, CAD\$ 1.3 billion was delivered through direct effects, CAD\$ 1.4 billion through indirect and induced effects (e.g., supply chain effects, household consumption resulting from the income effect).

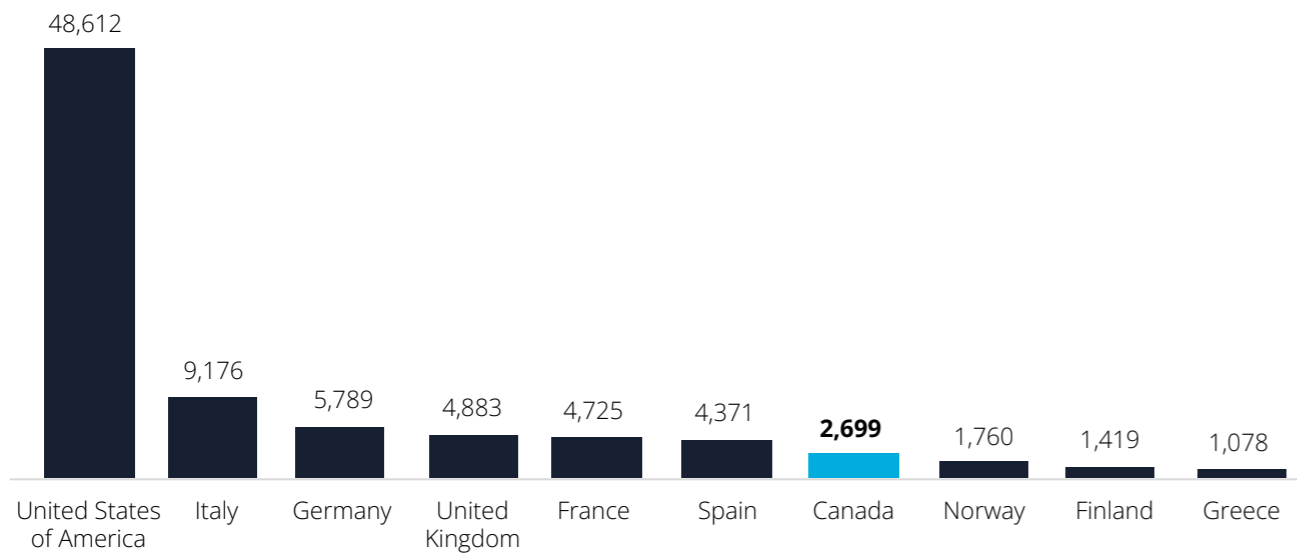
**Fig. 8. Cruise industry GDP impacts in Canada, 2023 (CAD\$ millions)**



Source: Oxford Economics

In terms of GDP stimulus, the cruise industry made the most impact in the United States with CAD\$ 48.6 billion generated through its activities in 2023. Canada ranked 7th out of the countries analysed, with a total GDP impact of CAD\$ 2.7 billion. It was ahead of Norway but behind Spain.

**Fig. 9. Cruise industry GDP impacts by country, 2023 (CAD\$ millions)**



Source: Oxford Economics

In 2023, the cruise industry is estimated to have contributed **CAD\$ 2.7 billion** in gross domestic product (**GDP**) to the Canadian economy.

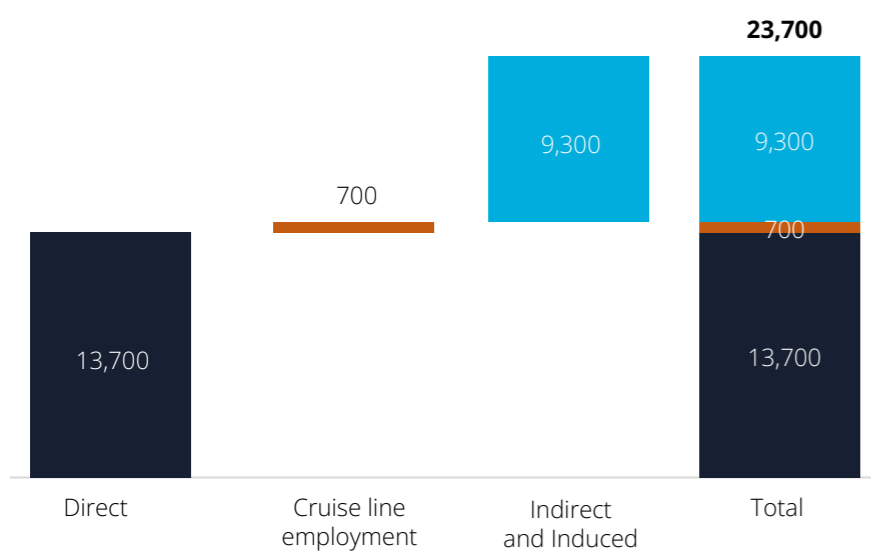


### 1.2.3 Employment

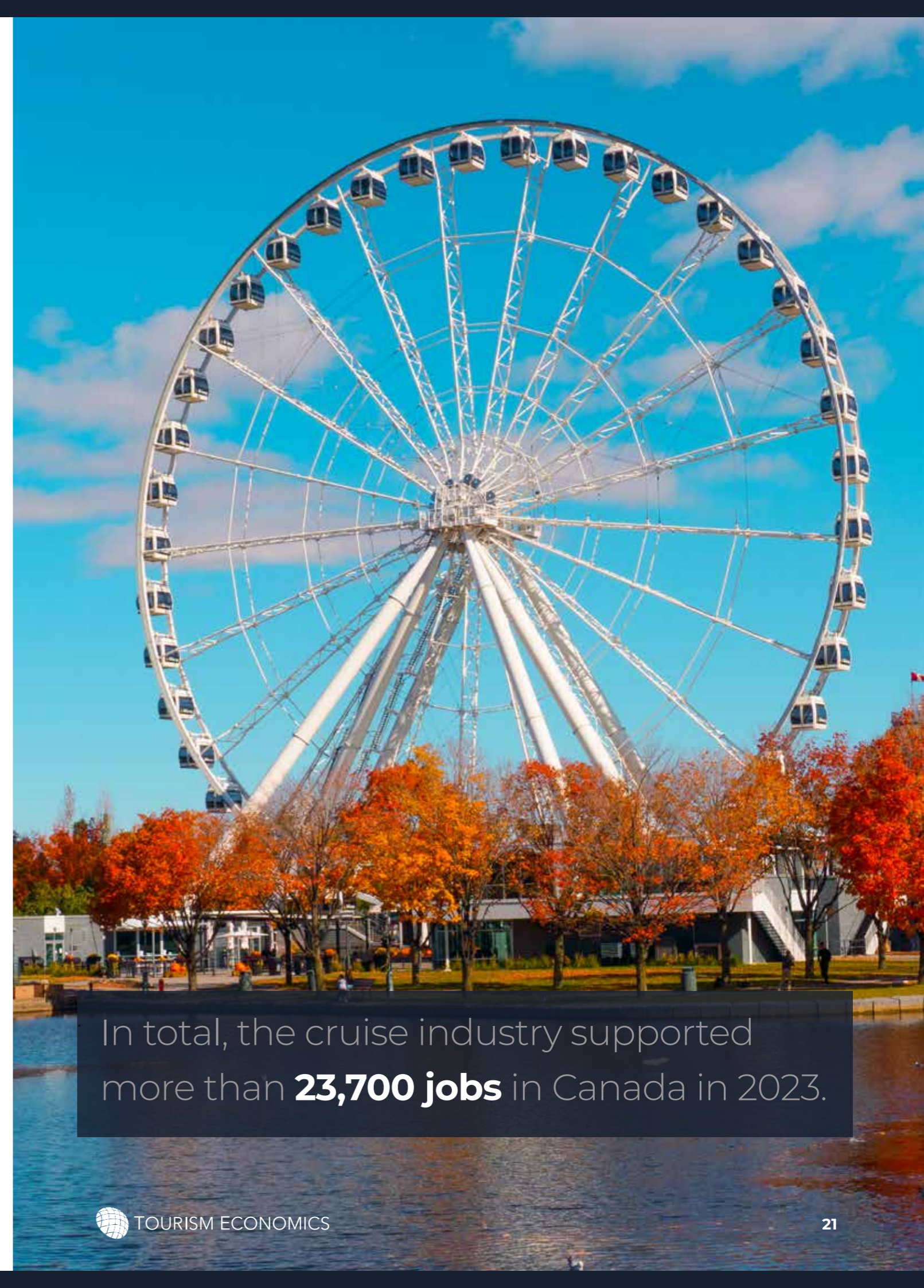
The industry's activities require a workforce to sustain it. **In total, the cruise industry supported more than 23,700 jobs in Canada in 2023.**

When assessing the impact of employment, we include the jobs supported by the expenditure channels linked to cruise (through direct, indirect, and induced channels) as well as the employment sustained by the cruise lines directly. It is estimated that cruise lines directly employed almost 700 people in Canada.

**Fig. 10. Cruise industry employment impacts in Canada, 2023 (number of jobs)**



Source: Oxford Economics



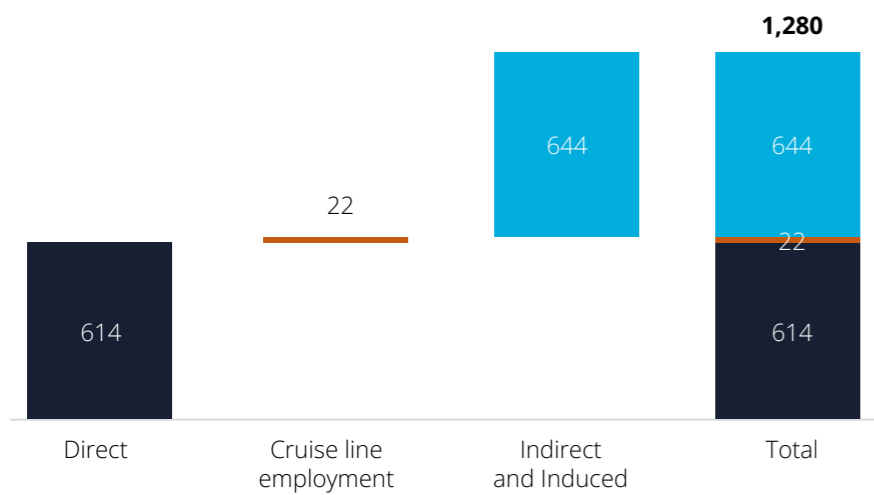
In total, the cruise industry supported more than **23,700 jobs** in Canada in 2023.

### 1.2.4 Wages

The cruise industry provided significant wages for a workforce across Canada through direct cruise line employment and additionally through direct, indirect, or induced effects related to the industry's onshore activities, particularly near large ports.<sup>5</sup>

**Total wages supported by the industry overall equated to an estimated CAD\$ 1.3 billion in Canada in 2023.** CAD\$ 22 million was provided through cruise line employment, while CAD\$ 614 million came through direct channels linked to cruise-related expenditure and, CAD\$ 644 million through indirect and induced channels.

**Fig. 11. Cruise industry-generated wages in Canada, 2023 (CAD\$ millions)**



Source: Oxford Economics

In Canada, total wages provided directly or supported by the cruise industry's activities are estimated at **CAD\$ 1.3 billion** in 2023.



# CRUISE INDUSTRY'S ECONOMIC IMPACT BY PROVINCE



# PROVINCE PROFILES

## 3.1 BRITISH COLUMBIA

**In 2023, the cruise industry supported over 12,400 jobs and generated a total output impact of CAD\$ 3.0 billion in British Columbia.**

The region is benefitting from the popularity of cruises to Alaska as, since 2019, the volume of APCDs in the region has increased by 22%. This is a commendable performance considering that the largest cruise ship currently cruising in the region has a capacity of 4,000, and thus, the region is not attracting newly launched vessels that tend to exceed this capacity. The premium segment represents 54% of the APCDs in the region, far above the global average of 22% for the year.

Vancouver is acting as the main turnaround port in this region while Victoria is the leading transit port. Princess Cruises and Holland America, with headquarters in Seattle, represent about 44% of the passenger capacity in the region.

**Fig. 12. Passenger traffic at British Columbia ports in 2023**

British Columbia	Transit	Embark
1 Vancouver	16,076	618,606
2 Victoria	969,726	-
3 Prince Rupert	80,928	-
<b>British Columbia</b>	<b>1,066,730</b>	<b>618,606</b>

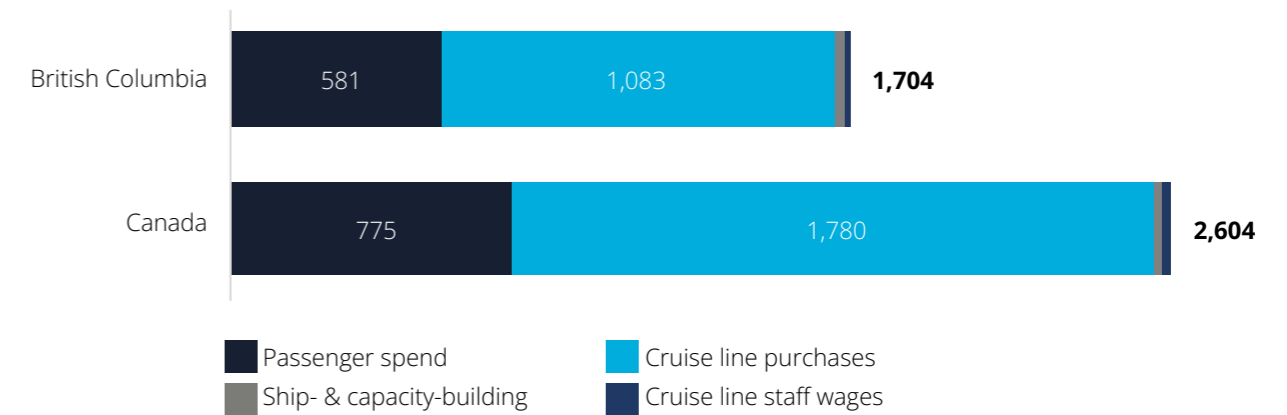
Source: As reported by ports



## 3.1.1 Spend

Total cruise-related expenditure in British Columbia in 2023 was CAD\$ 1.7 billion, making up two-thirds (65%) of overall cruise expenditure in Canada. Cruise line purchases contributed the majority of this, reaching CAD\$ 1.1 billion in 2023. Passenger spending was also a significant contributor, generating around a third (34%) of the overall expenditure impact. Shipbuilding and staff income contributed a much lower overall amount.

**Fig. 13. Direct spend by province, 2023 (CAD\$ millions)**

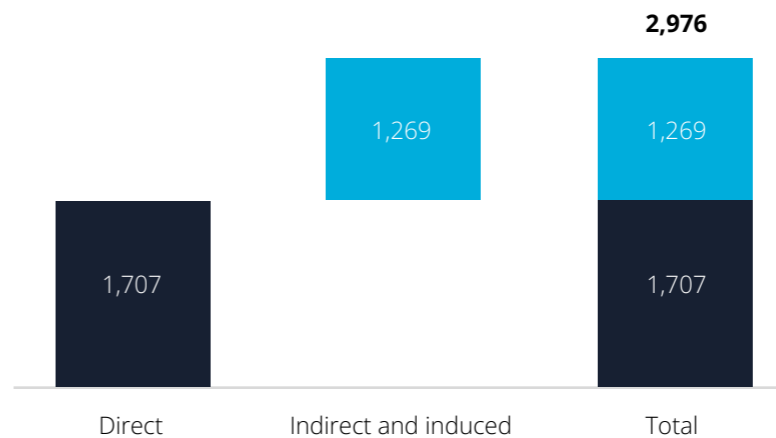


Source: Oxford Economics  
Parts may not sum to total due to rounding

## 3.1.2 Output

In British Columbia, activities related to the cruise industry's presence generated a total output impact of CAD\$ 3.0 billion in 2023. Of this, CAD\$ 1.7 billion was generated directly, with the remaining output (CAD\$ 1.3 billion) coming through indirect and induced effects.

**Fig. 14. Output by channel, 2023 (CAD\$ millions)**

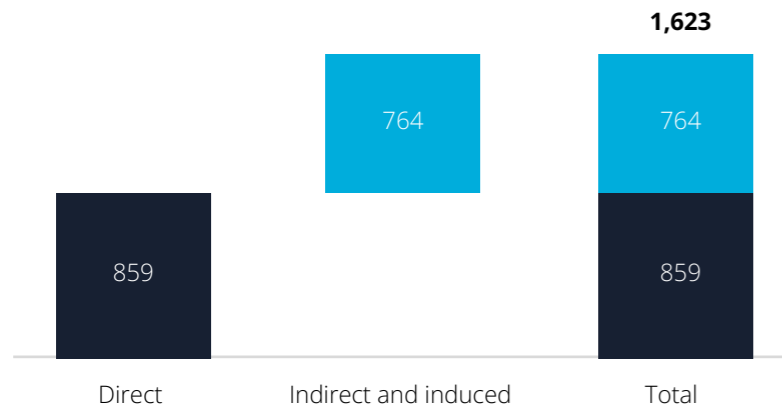


Source: Oxford Economics

### 3.1.3 GDP

Total GDP generated by the cruise industry equated to CAD\$ 1.6 billion, of which CAD\$ 859 million came through direct effects and an additional CAD\$ 764 million coming through indirect and induced effects. This CAD\$ 1,623 million impact in British Columbia constituted over 60% of the overall GDP impact of the cruise industry across Canada.

**Fig. 15. GDP by channel, 2023 (CAD\$ millions)**



Source: Oxford Economics

**Fig. 16. Cruise industry GDP in British Columbia compared to other Canadian provinces, 2023 (CAD\$ millions)**

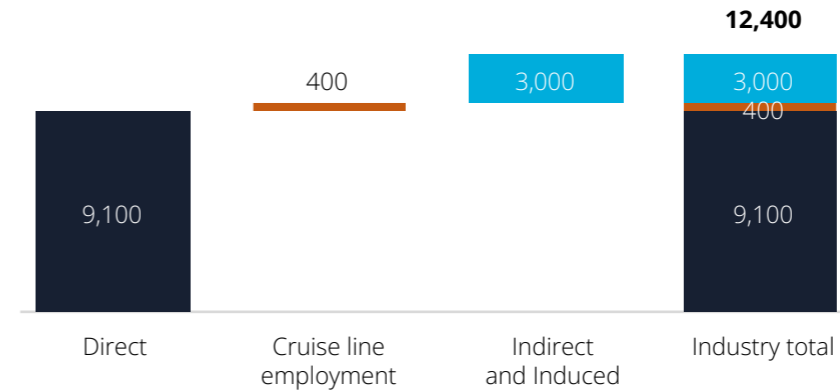
	Total GDP (CAD\$ mn)	% Canada Total
<b>1 British Columbia</b>	<b>1,623</b>	<b>60.1%</b>
2 Quebec	340	12.6%
3 Nova Scotia	100	3.7%
4 New Brunswick	42	1.6%
5 Prince Edward Island	34	1.3%
6 Newfoundland and Labrador	32	1.2%
<i>Rest of Canada</i>	527	19.5%
<b>Canada</b>	<b>2,699</b>	<b>100.0%</b>

Source: Oxford Economics.

### 3.1.4 Employment

Cruise line employment (i.e., employees based on cruise ships and cruise line office staff) delivered a small number of jobs in 2023, estimated at around 400 jobs. However, cruise line activity created jobs in the wider economy, with a total of more than 12,400 jobs created through direct, indirect, and induced expenditure effects.

**Fig. 17. Employment by channel, 2023 (number of jobs)**



Source: Oxford Economics

• Employment numbers may not sum to total due to rounding.



In 2023, British Columbia's cruise industry supported more than **12,400 jobs** and generated a total output of **CAD\$3.0 billion.**

### 3.1.5 Summary of Impacts

Fig. 18. Province Profile Summary, 2023 (CAD\$ millions)\*

		British Columbia	Canada
<b>Passenger flows (000s)</b>	Transit visits	1,067	2,138
	Embark	619	681
	Debark	608	677
	<b>Total cruise visits</b>	<b>2,294</b>	<b>3,496</b>
<b>Spend (CAD\$ Millions)</b>	Passengers	581	775
	Cruise line purchases	1,083	1,780
	Shipbuilding	28	28
	Staff income	11	21
	<b>Total spend</b>	<b>1,704</b>	<b>2,604</b>
<b>Output (CAD\$ Millions)</b>	Direct	1,707	2,609
	Indirect and induced	1,269	2,615
	<b>Total output</b>	<b>2,976</b>	<b>5,224</b>
<b>GDP (CAD\$ Millions)</b>	Direct	859	1,294
	Indirect and induced	764	1,406
	<b>Total GDP</b>	<b>1,623</b>	<b>2,699</b>
<b>Employment (Jobs)</b>	Direct (expenditure linked)	9,084	13,682
	Direct (cruise line employment)	360	689
	Indirect and Induced	3,000	9,349
	<b>Total employment</b>	<b>12,444</b>	<b>23,720</b>

Source: Oxford Economics



### 3.2 QUEBEC

In 2023, the cruise industry supported over 3,000 jobs and generated a total output impact of CAD\$ 685 million in Quebec.

Quebec is home to two iconic ports; Quebec City offering a mix of turnaround and transit operations, and Montreal with a higher share of turnaround activity. About 60% of the sailings to Montreal and Quebec City originate from the US, with most ships coming from New York and Boston.

The two ports have strong representation from premium (48%) and luxury (25%) brands, compared to 20% and 5% globally.

Fig. 19. Passenger traffic at Quebec ports in 2023

Quebec (QC)		Transit	Embark
1	Quebec City	70,825	38,724
2	Montreal	5,989	23,021
3	Saguenay	78,885	-
4	Gaspésie	13,000	-
5	Baie-Comeau	8,488	-
6	Trois-Rivieres	7,108	-
7	Havre-Saint-Pierre	6,651	-
8	Îles de la Madeleine	6,332	-
9	Sept-Îles	5,926	-
<b>Quebec</b>		<b>203,204</b>	<b>61,745</b>

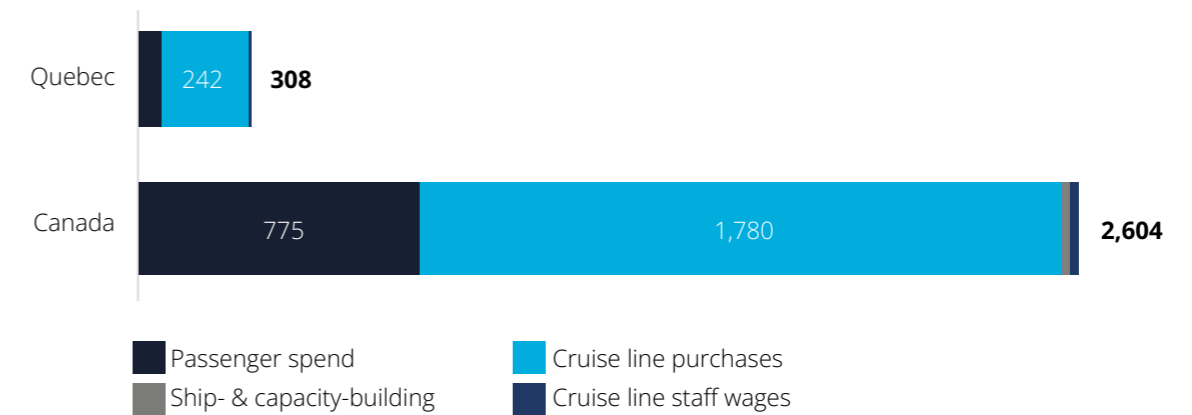
Source: As reported by ports



#### 3.2.1 Spend

Total spend on the cruise industry in Quebec was CAD\$ 308 million in 2023, making up almost 12% of overall cruise industry spend in Canada. The most significant sector was cruise line purchases which delivered an overall spend injection of CAD\$ 242 million in Quebec, making up over two-thirds (78%) of overall expenditure. Passenger spend was also significant, making up over a quarter of total expenditure at CAD\$ 63 million. Expenditure on shipbuilding and staff income delivered a much lower impact.

Fig. 20. Direct spend by province, 2023 (CAD\$ millions)

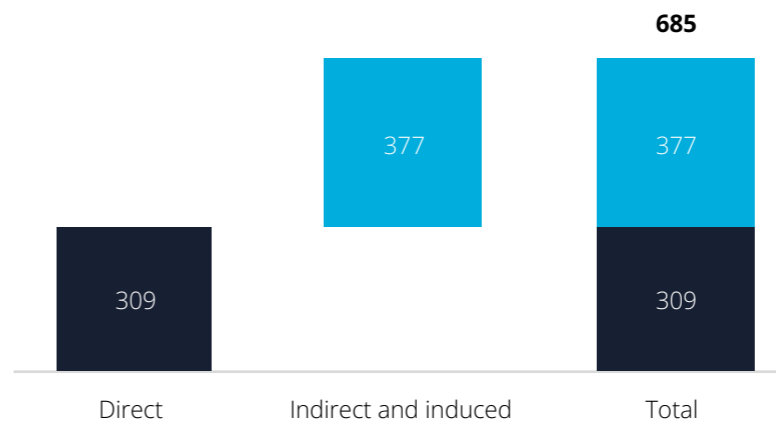


Source: Oxford Economics  
Parts may not sum to total due to rounding

#### 3.2.2 Output

In Quebec, activities related to the cruise industry generated a total output impact of CAD\$ 685 million in 2023. Of this, CAD\$ 309 million was generated directly, with the remaining output (CAD\$ 377 million) coming through indirect and induced effects.

Fig. 21. Output by channel, 2023 (CAD\$ millions)

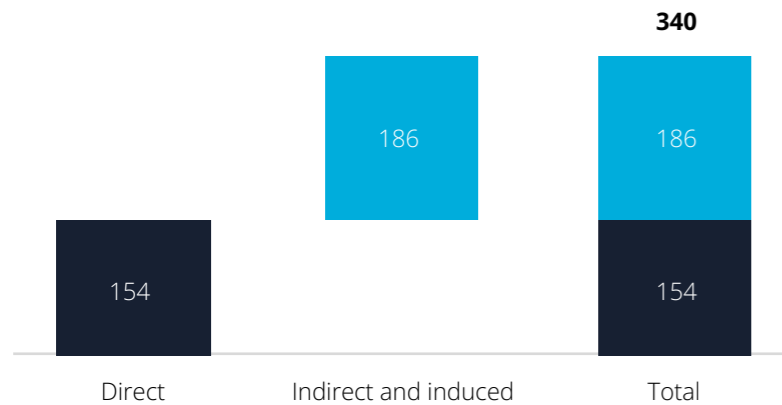


Source: Oxford Economics

### 3.2.3 GDP

Total GDP generated by the cruise industry equated to CAD\$ 340 million, of which CAD\$ 154 million came through direct effects and an additional CAD\$ 186 million coming through indirect and induced effects. This CAD\$ 340 million impact in Quebec made up nearly 13% of the overall GDP impact of the cruise industry across Canada, making Quebec the second most significant province.

**Fig. 22. GDP by channel, 2023 (CAD\$ millions)**



Source: Oxford Economics

**Fig. 23. Cruise industry GDP in Quebec compared to other Canadian provinces, 2023 (CAD\$ millions)**

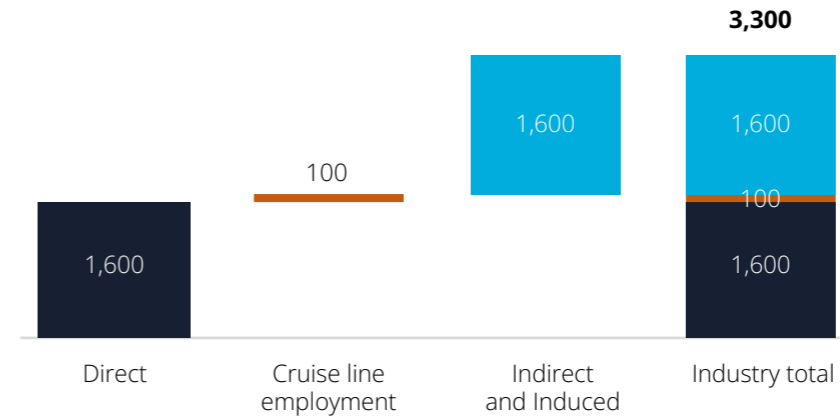
	Total GDP (CAD\$ mn)	% Canada Total
<b>1</b> British Columbia	1,623	60.1%
<b>2</b> <b>Quebec</b>	<b>340</b>	<b>12.6%</b>
<b>3</b> Nova Scotia	100	3.7%
<b>4</b> New Brunswick	42	1.6%
<b>5</b> Prince Edward Island	34	1.3%
<b>6</b> Newfoundland and Labrador	32	1.2%
<i>Rest of Canada</i>	527	19.5%
<b>Canada</b>	<b>2,699</b>	<b>100.0%</b>

Source: Oxford Economics.

### 3.2.4 Employment

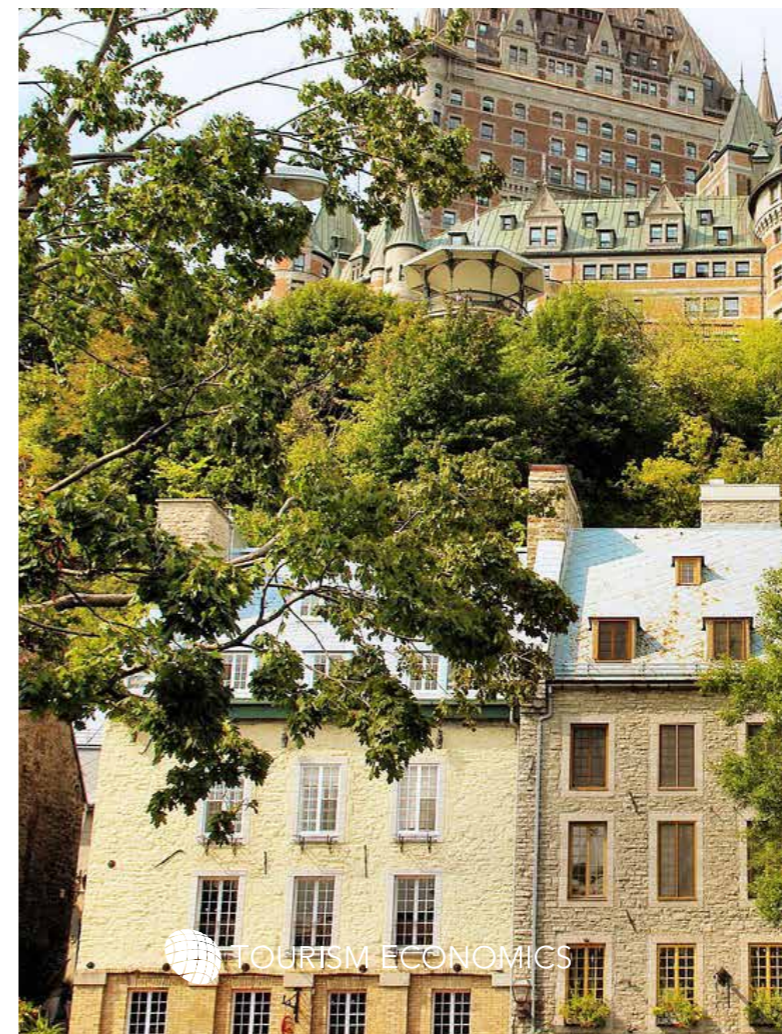
Cruise line employment (i.e., employees based on cruise ships and cruise line office staff) delivered a small number of jobs in 2023, equating to around 100 jobs. Despite this, cruise line activity created jobs in the wider economy of Quebec, with 3,300 jobs created through direct, indirect, and induced expenditure effects.

**Fig. 24. Employment by channel, 2023 (number of jobs)<sup>7</sup>**



Source: Oxford Economics

<sup>7</sup> Employment numbers may not sum to total due to rounding.



In 2023, Quebec's cruise industry supported nearly **3,300 jobs** and generated a total output of **CAD\$685 million.**

### 3.2.5 Summary of Impacts

Fig. 25. Province Profile Summary, 2023 (CAD\$ millions)

		Quebec	Canada
<b>Passenger flows (000s)</b>	Transit visits	203	2,138
	Embark	62	681
	Debark	66	677
	<b>Total cruise visits</b>	<b>331</b>	<b>3,496</b>
<b>Spend (CAD\$ Millions)</b>	Passengers	63	775
	Cruise line purchases	242	1,780
	Shipbuilding	-	28
	Staff income	3	21
	<b>Total spend</b>	<b>308</b>	<b>2,604</b>
<b>Output (CAD\$ Millions)</b>	Direct	309	2,609
	Indirect and induced	377	2,615
	<b>Total output</b>	<b>685</b>	<b>5,224</b>
<b>GDP (CAD\$ Millions)</b>	Direct	154	1,294
	Indirect and induced	186	1,406
	<b>Total GDP</b>	<b>340</b>	<b>2,699</b>
<b>Employment (Jobs)</b>	Direct (expenditure linked)	1,606	13,682
	Direct (cruise line employment)	107	689
	Indirect and Induced	1,584	9,349
	<b>Total employment</b>	<b>3,297</b>	<b>23,720</b>

Source: Oxford Economics



In 2023, the cruise industry generated a total output impact of **CAD\$685 million** in Quebec, including **CAD\$309 million** in direct output and **CAD\$377 million** in indirect and induced output.

### 3.3 NOVA SCOTIA

In 2023, the cruise industry supported around 1,000 jobs and generated a total output impact of CAD\$ 192 million in Nova Scotia.

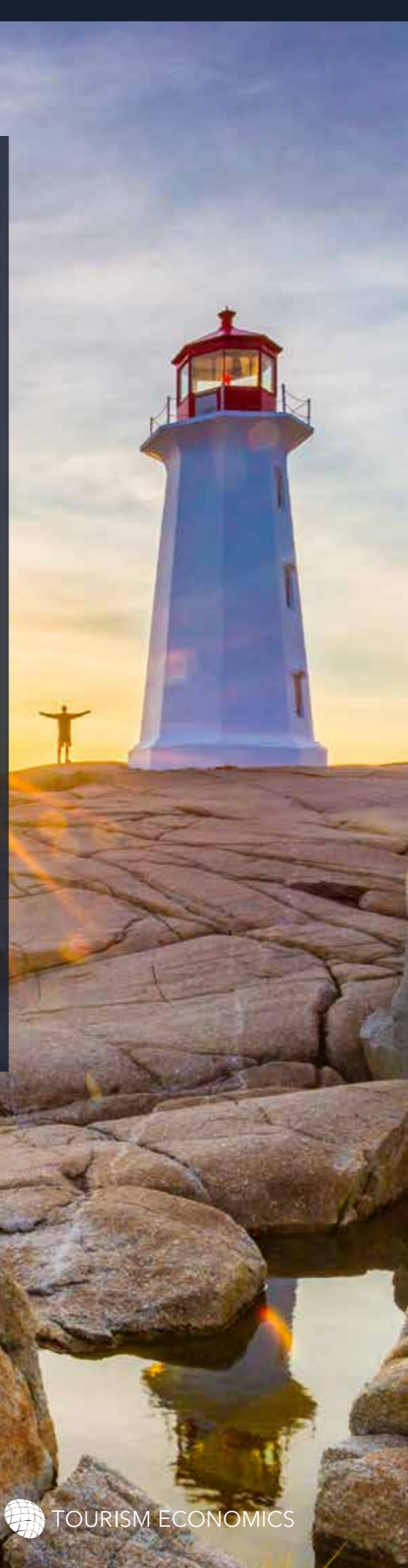
Halifax and Sydney are the main two ports in the province, welcoming mostly transit calls. While the contemporary segment is the leading segment for these ports, representing 52% of the passenger capacity, the premium segment also plays a significant role with 39% of the volume, compared to 20% globally. Norwegian cruise lines have the highest passenger capacity at 23%, while Princess Cruises and Holland America account for another 31%.

The ports of New York City and Bayonne (New Jersey) are the largest feeder ports to Halifax, accounting for more than 50% of passengers transiting there. Boston accounts for an additional 15%, and Quebec City for 14%. As is the case with many destinations in Canada-New England, September through October is the peak season, representing close to 70% of the passenger capacity activity.

Fig. 26. Passenger traffic at Nova Scotia (NS) ports in 2023

Nova Scotia (NS)	Transit
1 Halifax	300,005
2 Sydney NS	172,846
3 Other ports in NS	10,470
<b>Nova Scotia</b>	<b>483,321</b>

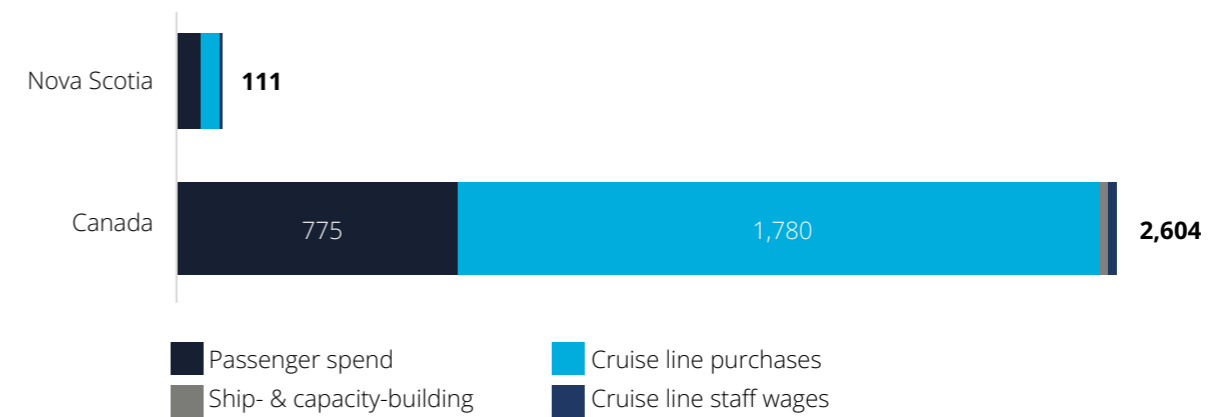
Source: As reported by ports



### 3.3.1 Spend

Total cruise expenditure in Nova Scotia was CAD\$ 111 million in 2023, representing around 4% of the overall cruise-line expenditure in Canada. The most significant sector was passenger spending, generating a majority (56%) of the overall expenditure within the province. Cruise-line purchases was also significant, creating a total expenditure impact of CAD\$ 49 million. Shipbuilding and staff income were both limited contributors to overall expenditure.

Fig. 27. Direct spend by province, 2023 (CAD\$ millions)

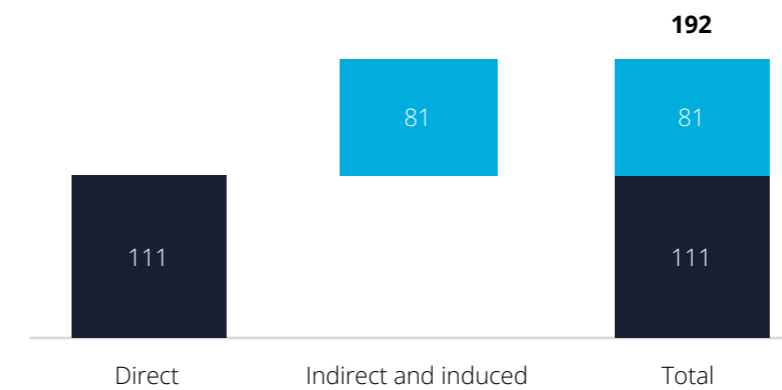


Source: Oxford Economics  
Parts may not sum to total due to rounding

### 3.3.2 Output

In Nova Scotia, activities related to the cruise industry's presence generated a total output impact of CAD\$ 192 million in 2023. Of this, CAD\$ 111 million was generated directly, with the remaining output (CAD\$ 81 million) generated through indirect and induced effects.

Fig. 28. Output by channel, 2023 (CAD\$ millions)

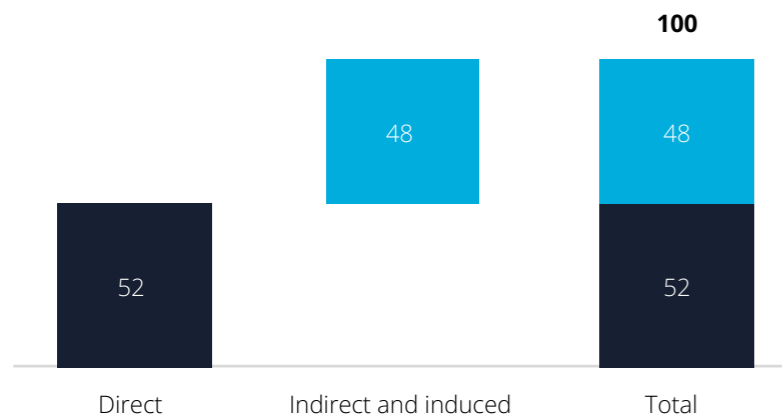


Source: Oxford Economics

### 3.3.3 GDP

Total GDP generated by the cruise industry equated to CAD\$ 100 million, of which CAD\$ 52 million came through direct effects and an additional CAD\$ 48 million coming through indirect and induced effects. This CAD\$ 100 million impact in Nova Scotia contributed close to 4% of the total GDP impact of the cruise industry across Canada, placing Nova Scotia as the third most significant province behind Quebec.

**Fig. 29. GDP by channel, 2023 (CAD\$ millions)**



Source: Oxford Economics

**Fig. 30. Cruise industry GDP in Nova Scotia compared to other Canadian provinces, 2023 (CAD\$ millions)**

	Total GDP (CAD\$ mn)	% Canada Total
1 British Columbia	1,623	60.1%
2 Quebec	340	12.6%
<b>3 Nova Scotia</b>	<b>100</b>	<b>3.7%</b>
4 New Brunswick	42	1.6%
5 Prince Edward Island	34	1.3%
6 Newfoundland and Labrador	32	1.2%
<i>Rest of Canada</i>	527	19.5%
<b>Canada</b>	<b>2,699</b>	<b>100.0%</b>

Source: Oxford Economics.

### 3.3.4 Employment

Cruise line employment (i.e., employees based on cruise ships and cruise line office staff) delivered a small number of jobs in 2023. However, cruise line activity created a large number of jobs in the wider economy of Nova Scotia, with a total of 1,000 jobs created overall through direct, indirect, and induced expenditure effects.

**Fig. 31. Employment by channel, 2023 (number of jobs)<sup>8</sup>**



Source: Oxford Economics

<sup>8</sup> Employment numbers may not sum to total due to rounding.



In 2023, Nova Scotia's cruise industry supported more than **1,000 jobs** and generated a total output of **CAD\$192 million.**

### 3.3.5 Summary of Impacts

Fig. 32. Province Profile Summary, 2023 (CAD\$ millions)<sup>9</sup>

		Nova Scotia	Canada
<b>Passenger flows (000s)</b>	Transit visits	483	2,138
	Embark	-	681
	Debark	-	677
	<b>Total cruise visits</b>	<b>483</b>	<b>3,496</b>
<b>Spend (CAD\$ Millions)</b>	Passengers	62	775
	Cruise line purchases	49	1,780
	Shipbuilding	-	28
	Staff income	<1	21
	<b>Total spend</b>	<b>111</b>	<b>2,604</b>
<b>Output (CAD\$ Millions)</b>	Direct	111	2,609
	Indirect and induced	81	2,615
	<b>Total output</b>	<b>192</b>	<b>5,224</b>
<b>GDP (CAD\$ Millions)</b>	Direct	52	1,294
	Indirect and induced	48	1,406
	<b>Total GDP</b>	<b>100</b>	<b>2,699</b>
<b>Employment (Jobs)</b>	Direct (expenditure linked)	732	13,682
	Direct (cruise line employment)	9	689
	Indirect and Induced	264	9,349
	<b>Total employment</b>	<b>1,005</b>	<b>23,720</b>

Source: Oxford Economics



In 2023, the cruise industry generated a total output impact of **CAD\$192 million** in Nova Scotia, including **CAD\$111 million** in direct output and **CAD\$81 million** in indirect and induced output.

### 3.4 NEW BRUNSWICK

In 2023, the cruise industry supported more than 400 jobs and generated a total output impact of CAD\$ 85 million in New Brunswick.

Saint John was the leading destination in New Brunswick, welcoming solely transit cruise calls. Royal Caribbean was the market leader in 2023, representing 27% of the passenger volume there, while Princess Cruises and Norwegian Cruise Line accounted for an additional 20% each.

More than 70% of the deployment to New Brunswick originated from the three main ports in New York and New Jersey: New York City, Brooklyn, and Bayonne.

Fig. 33. Passenger traffic at New Brunswick (NB) ports in 2023

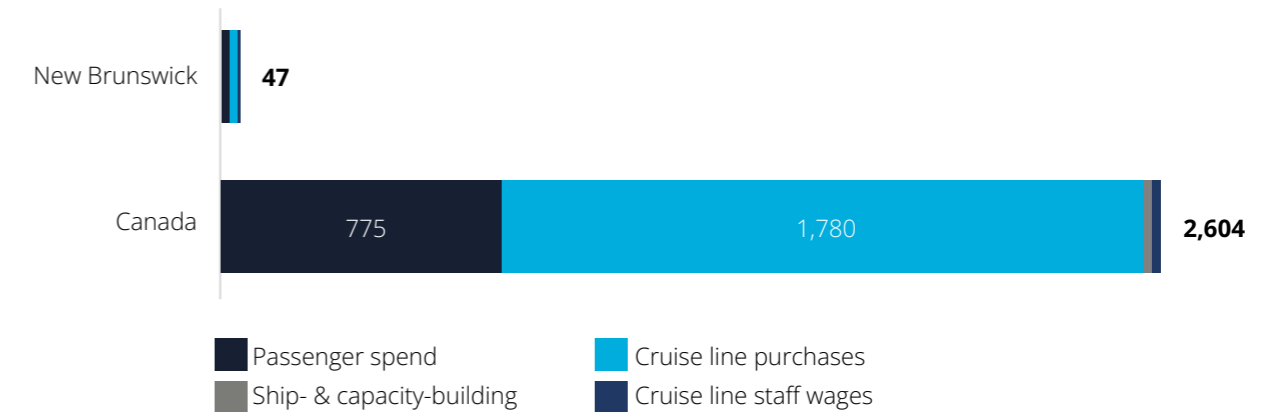
New Brunswick (NB)	Transit
1 Saint John NB	174,229
2 Other ports in NB	470
<b>New Brunswick</b>	<b>174,699</b>

Source: As reported by ports

### 3.4.1 Spend

Cruise related expenditure in New Brunswick in 2023 totalled CAD\$ 47 million, generating around 2% of the overall expenditure impact within Canada. Most of this expenditure (51%) came from cruise line purchases with the rest of overall expenditure coming from passenger spending.

Fig. 34. Direct spend by province, 2023 (CAD\$ millions)

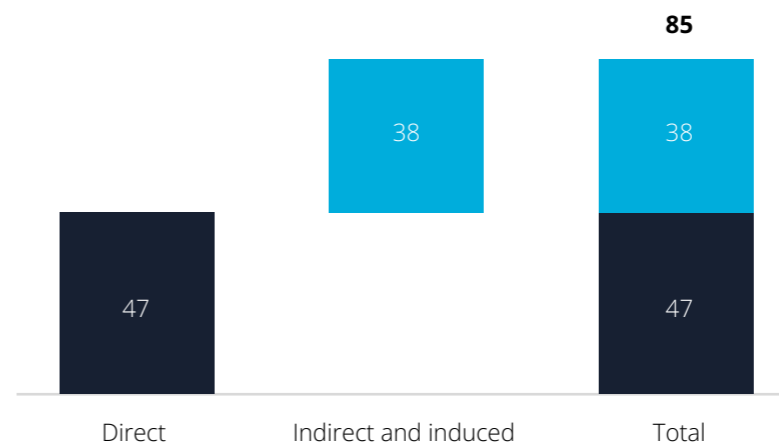


Source: Oxford Economics  
Parts may not sum to total due to rounding

### 3.4.2 Output

In New Brunswick, activities related to the cruise industry generated a total output impact of CAD\$ 85 million in 2023. The majority of this, CAD\$ 47 million, was generated directly, with the remaining output (CAD\$ 38 million) coming through indirect and induced effects.

Fig. 35. Output by channel, 2023 (CAD\$ millions)

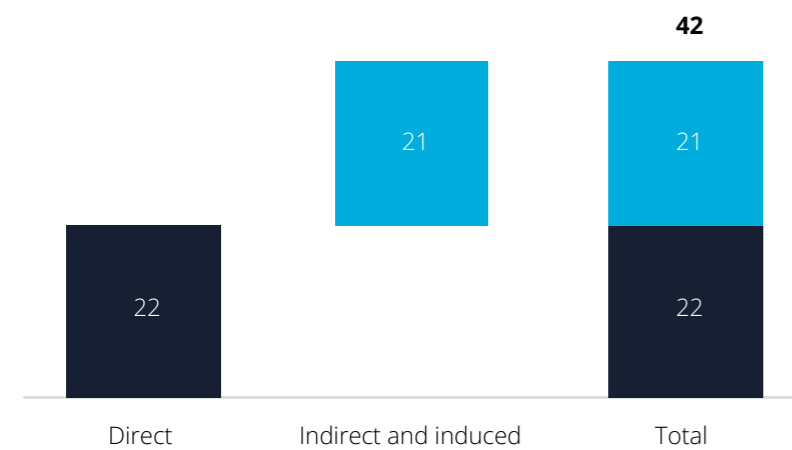


Source: Oxford Economics

### 3.4.3 GDP

Total GDP generated by the cruise industry equated to CAD\$ 42 million, of which CAD\$ 22 million came through direct effects and an additional CAD\$ 21 million coming through indirect and induced effects. This CAD\$ 42 million impact in New Brunswick made up close to 2% of the overall GDP impact of the cruise industry across Canada, a level comparable to that of Newfoundland and Labrador and Prince Edward Island.

**Fig. 36. GDP by channel, 2023 (CAD\$ millions)**



Source: Oxford Economics

**Fig. 37. Cruise industry GDP in New Brunswick compared to other Canadian provinces, 2023 (CAD\$ millions)**

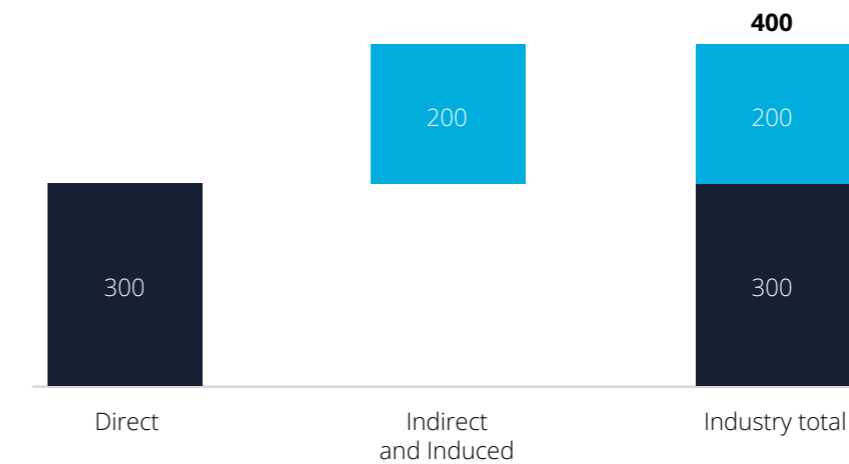
	Total GDP (CAD\$ mn)	% Canada Total
1 British Columbia	1,623	60.1%
2 Quebec	340	12.6%
3 Nova Scotia	100	3.7%
4 <b>New Brunswick</b>	<b>42</b>	<b>1.6%</b>
5 Prince Edward Island	34	1.3%
6 Newfoundland and Labrador	32	1.2%
<i>Rest of Canada</i>	527	19.5%
<b>Canada</b>	<b>2,699</b>	<b>100.0%</b>

Source: Oxford Economics.

### 3.4.4 Employment

Cruise line employment (i.e., employees based on cruise ships and cruise line office staff) delivered a small number of jobs in 2023. However, activities relating to cruising created jobs in the wider economy of New Brunswick, with a total of over 400 jobs created through direct, indirect, and induced expenditure effects.

**Fig. 38. Employment by channel, 2023 (number of jobs)<sup>10</sup>**



Source: Oxford Economics

<sup>10</sup> Employment numbers may not sum to total due to rounding.



In 2023, New Brunswick's cruise industry supported more than **400 jobs** and generated a total output of **CAD\$85 million.**

### 3.4.5 Summary of Impacts

Fig. 39. Province Profile Summary, 2023 (CAD\$ millions)

		New Brunswick	Canada
<b>Passenger flows (000s)</b>	Transit visits	175	2,138
	Embark	-	681
	Debark	-	677
	<b>Total cruise visits</b>	<b>175</b>	<b>3,496</b>
<b>Spend (CAD\$ Millions)</b>	Passengers	22	775
	Cruise line purchases	24	1,780
	Shipbuilding	-	28
	Staff income	<1	21
	<b>Total spend</b>	<b>47</b>	<b>2,604</b>
<b>Output (CAD\$ Millions)</b>	Direct	47	2,609
	Indirect and induced	38	2,615
	<b>Total output</b>	<b>85</b>	<b>5,224</b>
<b>GDP (CAD\$ Millions)</b>	Direct	22	1,294
	Indirect and induced	21	1,406
	<b>Total GDP</b>	<b>42</b>	<b>2,699</b>
<b>Employment (Jobs)</b>	Direct (expenditure linked)	284	13,682
	Direct (cruise line employment)	7	689
	Indirect and Induced	158	9,349
	<b>Total employment</b>	<b>449</b>	<b>23,720</b>

Source: Oxford Economics



In 2023, the cruise industry generated a total output impact of **CAD\$85 million** in New Brunswick, including **CAD\$47 million** in direct output and **CAD\$38 million** in indirect and induced output.

### 3.5 PRINCE EDWARD ISLAND

In 2023, the cruise industry supported close to 400 jobs and generated a total output impact of CAD\$ 62 million in Prince Edward Island.

Charlottetown is the leading destination in Prince Edward Island, welcoming cruise ships for transit only. Norwegian Cruise Lines and Holland America represented about 25% of the passenger capacity each.

Most of the cruise traffic through Charlottetown comes from Boston (~60%), complemented by Quebec City (~25%).

Fig. 40. Passenger traffic at Prince Edward Island ports in 2023

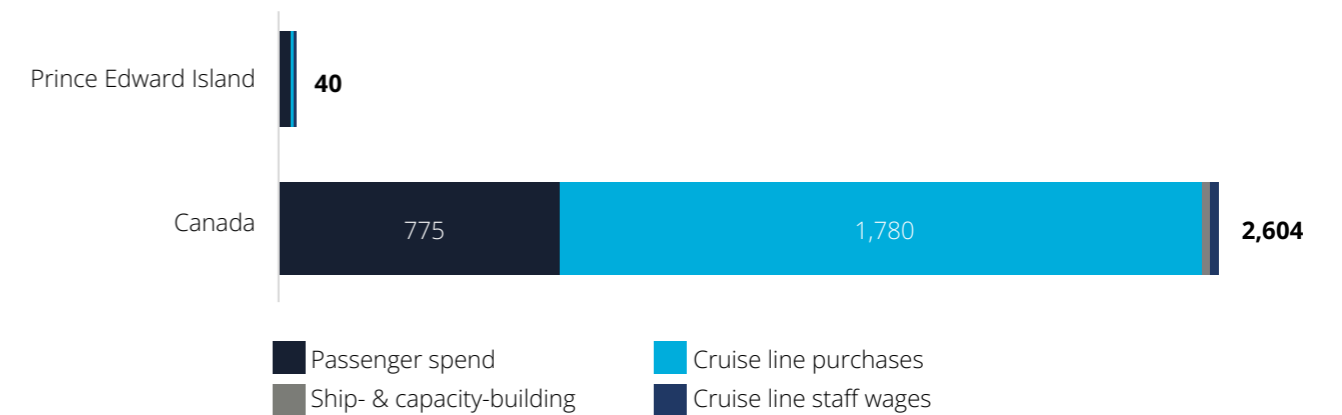
Prince Edward Island (PE)	Transit
1 Charlottetown	119,488
<b>Prince Edward Island</b>	<b>119,488</b>

Source: As reported by ports

#### 3.5.1 Spend

Total cruise-related expenditure in Prince Edward Island in 2023 was CAD\$ 40 million, making up a small share (2%) of overall cruise expenditure in Canada. Passenger spend contributed the largest share of this, whilst cruise line purchases spend was also a significant contributor, constituting 27% of local expenditure.

Fig. 41. Direct spend by province, 2023 (CAD\$ millions)

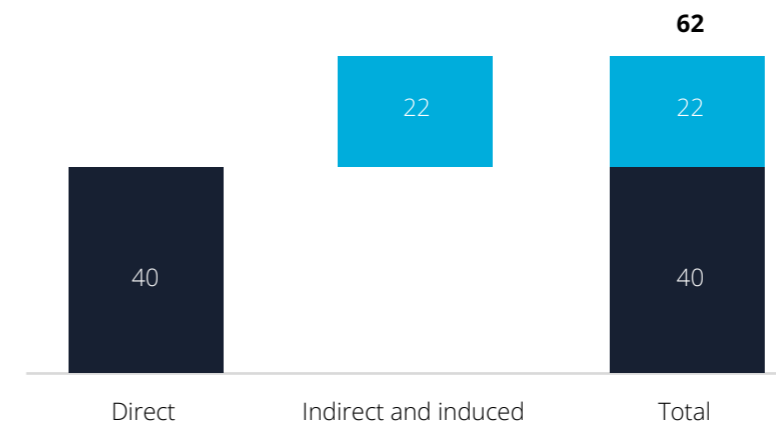


Source: Oxford Economics  
Parts may not sum to total due to rounding

#### 3.5.2 Output

In Prince Edward Island, activities related to the cruise industry generated a total output impact of CAD\$ 62 million in 2023. Of this, CAD\$ 40 million was generated directly, with the remaining output (CAD\$ 22 million) coming through indirect and induced effects.

Fig. 42. Output by channel, 2023 (CAD\$ millions)

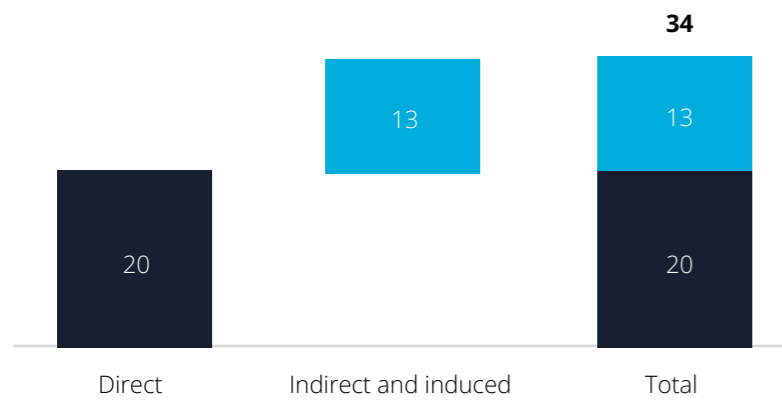


Source: Oxford Economics

### 3.5.3 GDP

Total GDP generated by the cruise industry equated to CAD\$ 34 million, of which CAD\$ 20 million came through direct effects and an additional CAD\$ 13 million coming through indirect and induced effects. This CAD\$ 34 million impact in Prince Edward Island contributed over 2% of the overall GDP impact of the cruise industry across Canada, a similar level of contribution to that of New Brunswick and Newfoundland and Labrador.

**Fig. 43. GDP by channel, 2023 (CAD\$ millions)**



Source: Oxford Economics

**Fig. 44. Cruise industry GDP in Prince Edward Island compared to other Canadian provinces, 2023 (CAD\$ millions)**

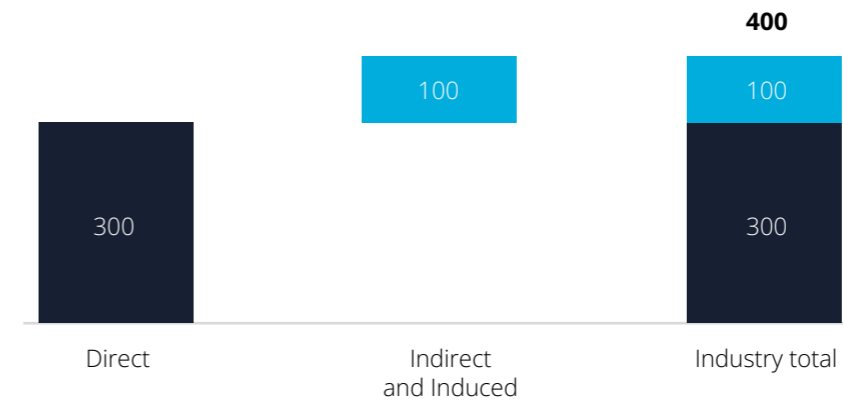
	Total GDP (CAD\$ mn)	% Canada Total
1 British Columbia	1,623	60.1%
2 Quebec	340	12.6%
3 Nova Scotia	100	3.7%
4 New Brunswick	42	1.6%
5 <b>Prince Edward Island</b>	<b>34</b>	<b>1.3%</b>
6 Newfoundland and Labrador	32	1.2%
<i>Rest of Canada</i>	527	19.5%
<b>Canada</b>	<b>2,699</b>	<b>100.0%</b>

Source: Oxford Economics.

### 3.5.4 Employment

Cruise line employment (i.e., employees based on cruise ships and cruise line office staff) created an insignificant number of jobs in Prince Edward Island. Despite this, cruise line activity created many more jobs in the wider economy of Prince Edward Island, with a total of close to 400 jobs created through direct, indirect, and induced expenditure effects outside of direct cruise line employment.

**Fig. 45. Employment by channel, 2023 (number of jobs)<sup>11</sup>**



Source: Oxford Economics

<sup>11</sup> Employment numbers may not sum to total due to rounding.



In 2023, Prince Edward Island's cruise industry supported close to **400 jobs** and generated a total output of **CAD\$62 million.**

### 3.5.5 Summary of Impacts

Fig. 46. Province Profile Summary, 2023 (CAD\$ millions)

		Prince Edward Island	Canada
<b>Passenger flows (000s)</b>	Transit visits	119	2,138
	Embark	-	681
	Debark	-	677
	<b>Total cruise visits</b>	<b>119</b>	<b>3,496</b>
<b>Spend (CAD\$ Millions)</b>	Passengers	30	775
	Cruise line purchases	11	1,780
	Shipbuilding	-	28
	Staff income	<1	21
	<b>Total spend</b>	<b>40</b>	<b>2,604</b>
<b>Output (CAD\$ Millions)</b>	Direct	40	2,609
	Indirect and induced	22	2,615
	<b>Total output</b>	<b>62</b>	<b>5,224</b>
<b>GDP (CAD\$ Millions)</b>	Direct	20	1,294
	Indirect and induced	13	1,406
	<b>Total GDP</b>	<b>34</b>	<b>2,699</b>
<b>Employment (Jobs)</b>	Direct (expenditure linked)	282	13,682
	Direct (cruise line employment)	2	689
	Indirect and Induced	86	9,349
	<b>Total employment</b>	<b>369</b>	<b>23,720</b>

Source: Oxford Economics



In 2023, the cruise industry generated a total output impact of **CAD\$62 million** in Prince Edward Island, including **CAD\$40 million** in direct output and **CAD\$22 million** in indirect and induced output.

### 3.6 NEWFOUNDLAND & LABRADOR

In 2023, the cruise industry supported more than 300 jobs and generated a total output impact of CAD\$ 63 million in Newfoundland & Labrador.

Corner Brook and St. John's are the leading destinations in Newfoundland and Labrador with most cruise ships calling for transit only. Small and medium cruise ships, below 2,500 passenger capacity, represent about 93% of the calls for these two ports.

Most passengers come from New York and Boston, at a combined 40%. The remaining passengers originate from a variety of ports, including some in Europe.

Fig. 47. Passenger traffic at Newfoundland & Labrador (NL) ports in 2023

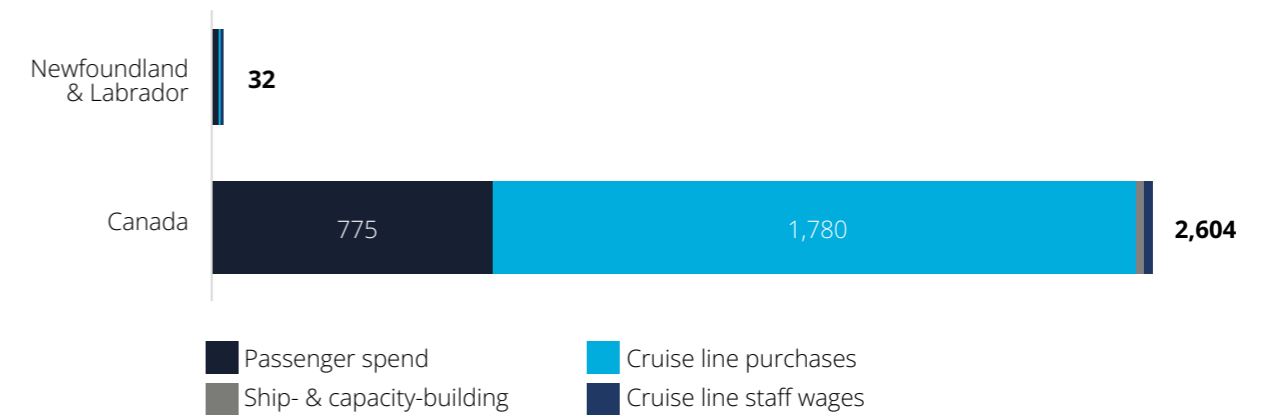
Newfoundland & Labrador (NL)	Transit
1 St. John's NL	28,421
2 Corner Brook	40,948
3 Other ports in NL	18,784
<b>Newfoundland &amp; Labrador</b>	<b>88,153</b>

Source: As reported by ports

### 3.6.1 Spend

Total cruise expenditure was CAD\$ 32 million in Newfoundland and Labrador, making up over 1% of total cruise expenditure within Canada. The majority of this spend came from passenger spend, totalling CAD\$ 17 million in 2023, making up over 50% of overall expenditure in the province. The rest of this expenditure was generated via cruise line purchases.

Fig. 48. Direct spend by province, 2023 (CAD\$ millions)

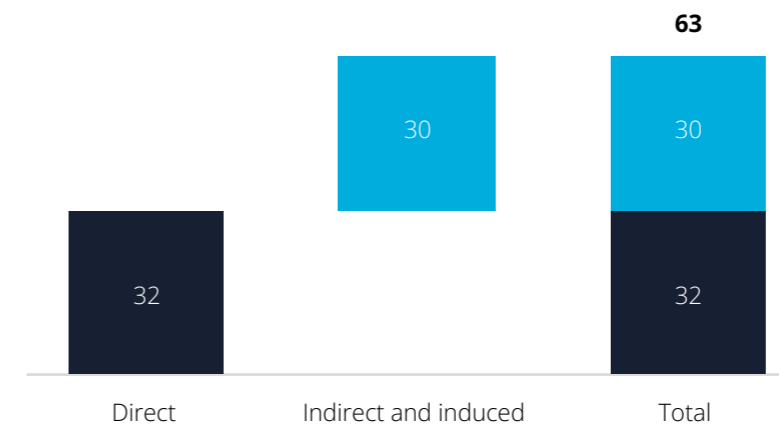


Source: Oxford Economics  
Parts may not sum to total due to rounding

### 3.6.2 Output

In Newfoundland & Labrador, cruise industry activity generated a total output impact of CAD\$ 63 million in 2023. Of this, CAD\$ 32 million was generated through direct effects, with the remaining output (CAD\$ 30 million) coming through indirect and induced effects.

Fig. 49. Output by channel, 2023 (CAD\$ millions)

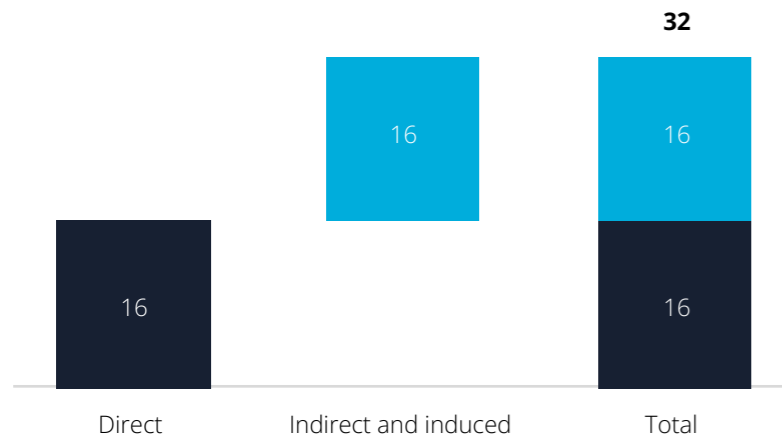


Source: Oxford Economics

### 3.6.3 GDP

Total GDP generated by the cruise industry equated to CAD\$ 32 million, of which CAD\$ 16 million came through direct effects. An additional CAD\$ 16 million was generated through indirect and induced GDP effects. This CAD\$ 32 million impact in Newfoundland and Labrador made up over 1% of the overall GDP impact of the cruise industry across Canada.

**Fig. 50. GDP by channel, 2023 (CAD\$ millions)**



Source: Oxford Economics

**Fig. 51. Cruise industry GDP in Newfoundland & Labrador compared to other Canadian provinces, 2023 (CAD\$ millions)**

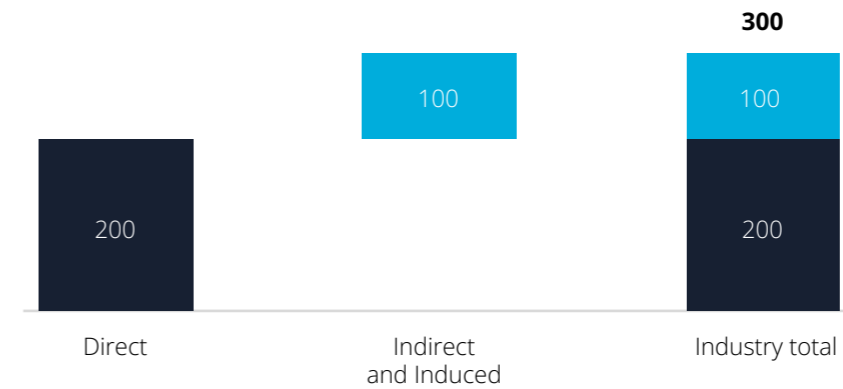
	Total GDP (CAD\$ mn)	% Canada Total
1 British Columbia	1,623	60.1%
2 Quebec	340	12.6%
3 Nova Scotia	100	3.7%
4 New Brunswick	42	1.6%
5 Prince Edward Island	34	1.3%
6 Newfoundland & Labrador	32	1.2%
Rest of Canada	527	19.5%
<b>Canada</b>	<b>2,699</b>	<b>100.0%</b>

Source: Oxford Economics.

### 3.6.4 Employment

Cruise line employment (i.e., employees based on cruise ships and cruise line office staff) delivered an insignificant number of jobs in 2023. However, cruise line activity created a larger number of jobs in the wider economy of Newfoundland & Labrador, with a total of around 300 jobs created through direct, indirect, and induced expenditure effects.

**Fig. 52. Employment by channel, 2023 (number of jobs)<sup>12</sup>**



Source: Oxford Economics

<sup>12</sup> Employment numbers may not sum to total due to rounding.



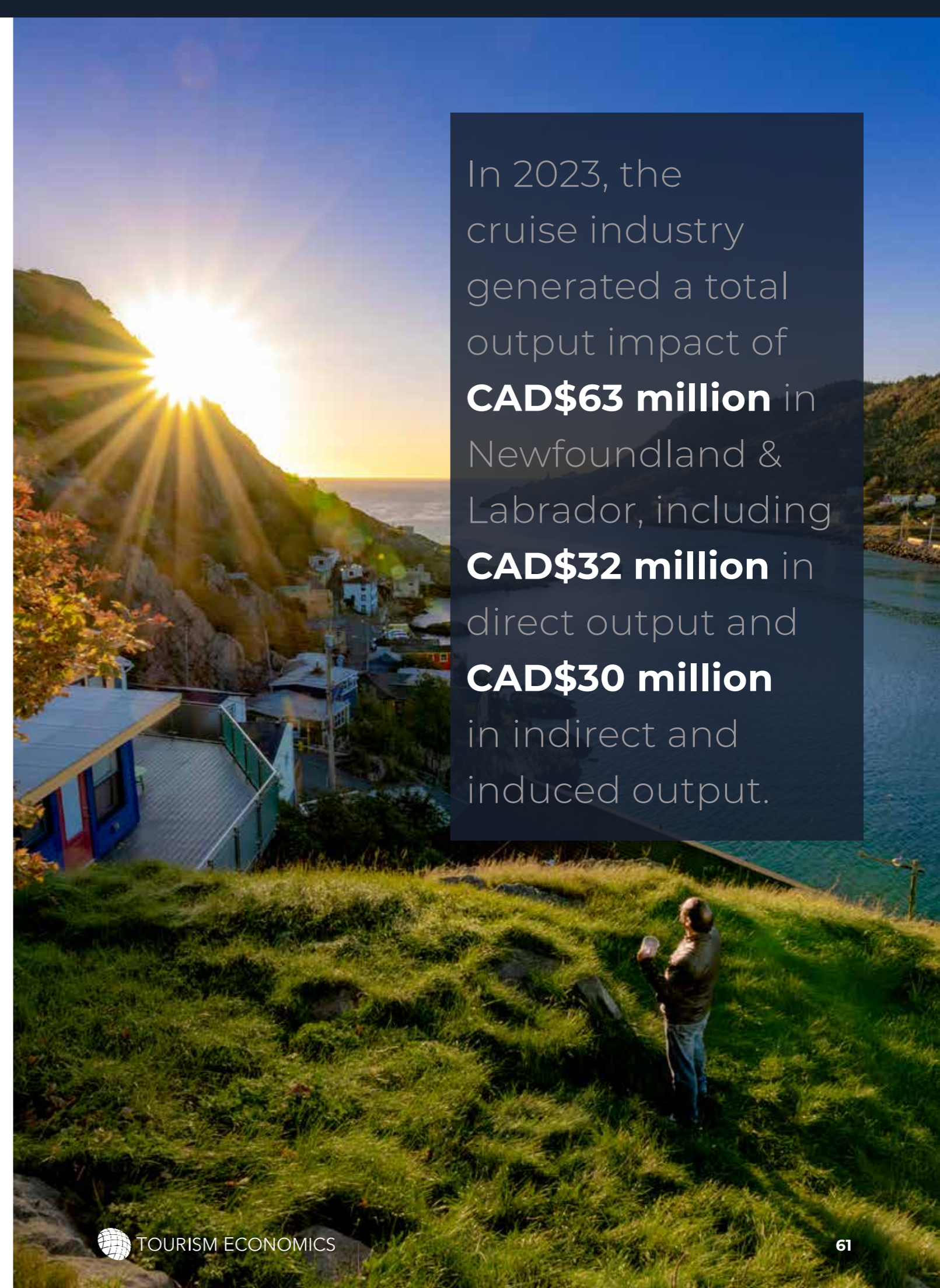
In 2023, Newfoundland & Labrador's cruise industry supported over **300 jobs** and generated a total output of **CAD\$63 million.**

### 3.6.5 Summary of Impacts

Fig. 53. Province Profile Summary, 2023 (CAD\$ millions)

		Newfoundland & Labrador	Canada
<b>Passenger flows (000s)</b>	Transit visits	88	2,138
	Embark	<1	681
	Debark	1	677
	<b>Total cruise visits</b>	<b>89</b>	<b>3,496</b>
<b>Spend (CAD\$ Millions)</b>	Passengers	17	775
	Cruise line purchases	15	1,780
	Shipbuilding	-	28
	Staff income	<1	21
	<b>Total spend</b>	<b>32</b>	<b>2,604</b>
<b>Output (CAD\$ Millions)</b>	Direct	32	2,609
	Indirect and induced	30	2,615
	<b>Total output</b>	<b>63</b>	<b>5,224</b>
<b>GDP (CAD\$ Millions)</b>	Direct	16	1,294
	Indirect and induced	16	1,406
	<b>Total GDP</b>	<b>32</b>	<b>2,699</b>
<b>Employment (Jobs)</b>	Direct (expenditure linked)	188	13,682
	Direct (cruise line employment)	4	689
	Indirect and Induced	149	9,349
	<b>Total employment</b>	<b>341</b>	<b>23,720</b>

Source: Oxford Economics



In 2023, the cruise industry generated a total output impact of **CAD\$63 million** in Newfoundland & Labrador, including **CAD\$32 million** in direct output and **CAD\$30 million** in indirect and induced output.

# ABOUT THE RESEARCH TEAM



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