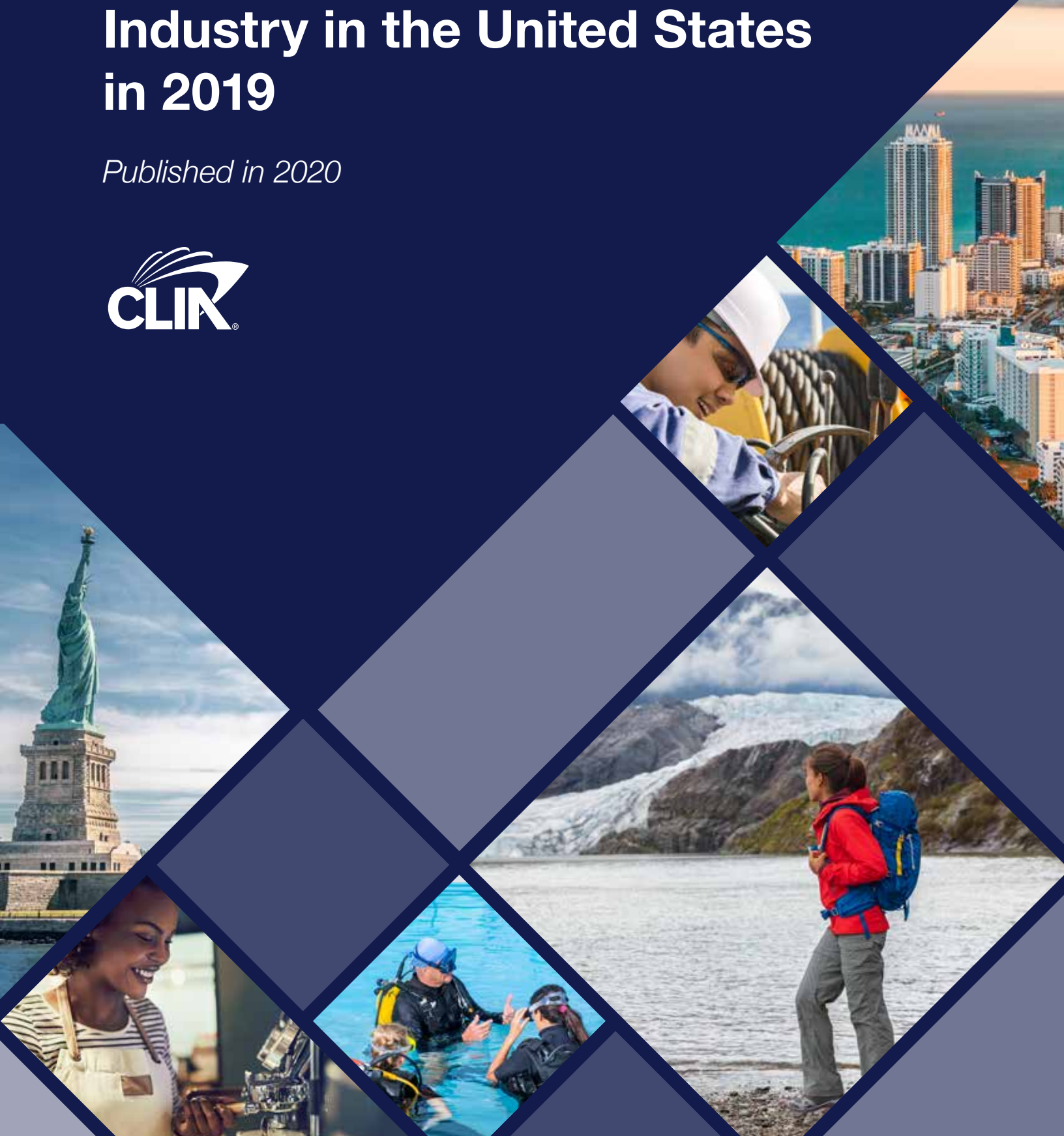


The Economic Contribution of the International Cruise Industry in the United States in 2019

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The Contribution of the International Cruise Industry to the U.S. Economy in 2019

Prepared for:

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Table of Contents

EXECUTIVE SUMMARY	2
<i>THE CONTRIBUTION OF THE INTERNATIONAL CRUISE INDUSTRY TO THE UNITED STATES ECONOMY.....</i>	<i>2</i>
<i>TRENDS: 2010 – 2019.....</i>	<i>7</i>
<i>THE CONTRIBUTION OF THE INTERNATIONAL CRUISE INDUSTRY TO INDIVIDUAL STATE ECONOMIES.....</i>	<i>9</i>
SECTION I: IMPACT OF THE INTERNATIONAL CRUISE INDUSTRY ON THE U.S. ECONOMY IN 2019	15
U.S. CRUISE PASSENGERS.....	15
SPENDING IN THE U.S. ECONOMY GENERATED BY THE CRUISE INDUSTRY	19
<i>Direct Economic Impacts in the United States During 2019.....</i>	<i>22</i>
<i>Indirect and Induced Economic Impacts in the United States During 2019</i>	<i>31</i>
<i>Total Economic Impacts in the United States During 2019</i>	<i>35</i>
SECTION II: THE CONTRIBUTION OF THE CRUISE INDUSTRY TO THE U.S. ECONOMY BY STATE IN 2019	38
SUMMARIES OF THE ECONOMIC IMPACTS OF THE TOP TEN STATES	40
<i>Florida</i>	<i>42</i>
<i>California.....</i>	<i>44</i>
<i>Texas</i>	<i>47</i>
<i>New York.....</i>	<i>49</i>
<i>Alaska.....</i>	<i>51</i>
<i>Washington</i>	<i>53</i>
<i>Georgia</i>	<i>55</i>
<i>Illinois</i>	<i>56</i>
<i>New Jersey</i>	<i>57</i>
<i>Louisiana</i>	<i>59</i>
<i>Economic Impacts in the Remaining States</i>	<i>61</i>
APPENDIX I – STATE IMPACT METHODOLOGY	63
APPENDIX II – INDIVIDUAL STATE TABLES.....	67

Executive Summary

The number of passengers sourced¹ from the United States and those embarking from U.S. ports each rose from 2018 to 2019. Passengers sourced from the U.S. and including Puerto Rico, totaled 14.2 million, up 8.4 percent from 13.1 million in 2018. This was another record for the U.S. (see **Table ES-1**).

Cruise passenger embarkations from U.S. ports increased by 8.8 percent, from 12.7 million in 2018 to 13.8 in 2019. Once again, this was a new high for passenger embarkations from U.S. ports.

The Contribution of the International Cruise Industry to the United States Economy

Driven by the strong growth in passenger embarkations and U.S. sourced passengers, the growth in direct spending by the cruise industry in the U.S. increased. The growth in direct spending by the cruise lines and their passengers and crew in the U.S. rose by 4.9 percent to \$25.1 billion in 2019. This is 28 percent higher than it was in 2012. The \$25.1 billion in direct spend once again represented a new peak in cruise industry expenditures in the United States. Overall, cruise lines direct expenditures experienced a 2.9 percent increase from 2018. The \$18.1 billion in expenditures by the cruise lines for goods and services, and capital expenditures, accounted for 72 percent of the overall direct spending, down from 74 percent 2018. Cruise lines' direct expenditures for wages for U.S. employees and taxes paid to U.S. federal, state and local tax jurisdictions increased by 14 percent to \$1.9 billion, accounting for 7.6 percent of overall direct expenditures.

The \$5.1 billion in passenger and crew spending for transportation, accommodations, food and other retail goods accounted for the remaining 20 percent of direct cruise industry spending. Passenger and crew spending increased by 9.4 percent, in part driven by the robust growth in passenger embarkations from U.S. ports. Since 2012, total passenger and crew spending has increased by 28 percent, which has helped drive the total economic impact up about 31 percent from \$42.3 billion in 2012 to \$55.5 billion during this timeframe.

¹ Passengers who reside in the U.S. and embark on a domestic or non-domestic cruise

Table ES-1 – Expenditures of the International Cruise Industry in the U.S., 2012 – 2019

	2012	2014	2016	2018	2019	Change from Previous Period			
						2014	2016	2018	2019
Passengers Sourced from the U.S.	10.67	11.33	11.50	13.09	14.20	6.1%	1.5%	13.8%	8.4%
U.S. Embarkations	10.09	11.06	11.66	12.68	13.79	9.6%	5.4%	8.8%	8.8%
Industry Spending in U.S. (\$ Billions)	\$18.29	\$19.59	\$20.20	\$22.28	\$23.23	7.1%	3.1%	10.3%	4.2%
Cruise Lines	\$14.63	\$15.63	\$16.02	\$17.61	\$18.12	6.9%	2.5%	10.0%	2.9%
Goods and Services	\$12.66	\$13.65	\$13.96	\$15.34	\$15.76	7.8%	2.2%	9.9%	2.7%
Capital Expenditures (incl. net interest)	\$ 1.97	\$ 1.98	\$ 2.06	\$ 2.27	\$ 2.36	0.7%	3.8%	10.2%	4.1%
Passengers and Crew	\$ 3.66	\$ 3.96	\$ 4.18	\$ 4.67	\$ 5.11	8.1%	5.8%	11.6%	9.4%
Wages & Taxes Paid by Cruise Lines	\$ 1.34	\$ 1.43	\$ 1.48	\$ 1.67	\$ 1.91	6.4%	3.9%	12.7%	14.2%
Direct U.S.-based Spending	\$19.63	\$21.02	\$21.69	\$23.95	\$25.14	7.1%	3.2%	10.4%	4.9%

Source: Business Research & Economic Advisors and Cruise Lines International Association

As indicated in **Table ES-2**, after increasing by nearly 13 percent in 2018, direct cruise industry expenditures in the U.S. rose by nearly 5 percent from 2018 to 2019. The direct cruise industry expenditures in the U.S. rose to a new peak of \$25.1 billion.

Table ES-2 – Economic Contribution of the International Cruise Industry, 2012 – 2019

	2012	2014	2016	2018	2019	Percent Change from Previous Period				
						2014	2016	2018	2019	
Passengers Sourced from the U.S.	10.67	11.33	11.50	13.09	14.20	6.1%	1.5%	23.4%	8.4%	
Direct Economic Impacts										
Direct Cruise Industry Expenditures (\$ B)*	\$19.63	\$21.02	\$21.69	\$23.95	\$25.14	7.1%	3.2%	15.9%	4.9%	
Employment	146,785	152,272	158,226	172,326	178,104	3.7%	3.9%	12.6%	3.4%	
Wages and Salaries (\$ B)	\$ 6.39	\$ 7.02	\$ 7.38	\$ 8.32	\$ 8.75	9.8%	5.2%	18.5%	5.1%	
Total Economic Impacts										
Total Output (\$ B)	\$42.27	\$46.09	\$47.76	\$52.67	\$55.46	9.1%	3.6%	16.1%	5.3%	
Employment	356,311	373,738	389,432	421,711	436,611	4.9%	4.2%	12.1%	3.5%	
Wages and Salaries (\$ B)	\$17.42	\$19.43	\$20.57	\$23.15	\$24.40	11.5%	5.9%	18.6%	5.4%	

* Includes wages and salaries paid to U.S. employees of the cruise lines

Source: Business Research & Economic Advisors and Cruise Lines International Association

NOTE: The Sum of the categories in the Tables and Figures within this report may not add to the totals due to rounding.

The \$25.1 billion in direct cruise industry expenditures generated an estimated 178,100 direct jobs throughout the U.S. economy paying \$8.8 billion in wages and salaries during 2019, both records for the cruise industry within the U.S. economy. Driven by the 4.9 percent increase in direct expenditures, the employment impact rose by 3.4 percent while the income impact rose by 5.1 percent.

As indicated in **Table ES-3**, the direct employment and wage income impacts were spread among virtually all industries in the U.S. economy. The core cruise travel sector in the U.S. - which consists of the cruise lines, airlines, travel agents, port service providers and local

businesses, such as hotels and restaurants that are directly impacted by passenger and crew spending - accounted for 72 percent of the total direct employment and 63 percent of the total direct wage income impacts – virtually unchanged from 2018. Led by direct employment by the cruise lines and other impacts in the transportation sector, businesses in the core cruise travel sector benefitted from almost 128,000 jobs paying \$5.5 billion in wages and salaries.

The cruise lines also purchased a variety of goods and services, such as food and beverages, fuel, insurance, financial and businesses services and entertainment among others, in support of their cruise operations. These expenditures generated another 50,200 jobs paying \$3.3 billion in wages and salaries during 2019.

Table ES-3 –Direct Economic Contribution of the International Cruise Industry in 2019

Sector	Direct Spending \$ Millions	Employment	Wage Income \$ Millions
Core Cruise Travel Sector	\$ 12,635	127,865	\$ 5,470
Passenger & Crew Spending	\$ 2,625	31,296	\$ 819
Port Services & Cruise Lines	\$ 4,351	55,196	\$ 2,651
Transportation Services	\$ 3,177	28,998	\$ 1,350
Air Transportation	\$ 2,482	12,375	\$ 650
Cruise Industry Suppliers	\$ 12,501	50,239	\$ 3,276
Agriculture, Mining, Utilities & Construction	\$ 48	201	\$ 7
Manufacturing	\$ 6,876	16,416	\$ 1,189
Food & Beverages	\$ 1,056	2,261	\$ 103
Apparel & Textiles	\$ 165	930	\$ 44
Chemicals & Plastics	\$ 343	412	\$ 42
Petroleum Refining	\$ 1,513	205	\$ 27
Fabricated Metal Products	\$ 539	1,863	\$ 125
Industrial Machinery	\$ 723	2,042	\$ 148
Ship Maintenance & Repair	\$ 1,526	3,393	\$ 273
Computers & Electronic Equipment	\$ 387	1,266	\$ 153
Other Manufacturing	\$ 623	4,044	\$ 275
Wholesale Trade	\$ 786	3,502	\$ 261
Other Transportation Services	\$ 25	35	\$ 4
Information Services	\$ 299	552	\$ 53
Finance, Insurance, Real Estate & Leasing	\$ 1,251	3,196	\$ 293
Services & Government (ex. Lodging & Travel Services)	\$ 3,217	26,337	\$ 1,468
Professional, Scientific & Technical Services	\$ 1,995	15,961	\$ 759
Administrative & Waste Management Services	\$ 55	249	\$ 17
Arts, Entertainment & Recreation	\$ 222	1,834	\$ 100
Other Services & Government	\$ 944	8,293	\$ 592
Total - 2019	\$ 25,136	178,104	\$ 8,746
Total - 2018	\$ 23,955	172,326	\$ 8,323
Percentage Change from 2018	4.9%	3.4%	5.1%

Source: Business Research & Economic Advisors.

The total economic impacts of the international cruise industry within the U.S. are the sum of the direct, indirect and induced impacts. The direct impacts discussed above generate additional, indirect and induced impacts, as the directly impacted businesses and their employees purchase goods and services from other business-to-business and business-to-consumer enterprises. As a result of these expenditures, the cruise industry generated \$55.5 billion in total output throughout the U.S. economy. The production of these goods and services generated 436,600 total jobs paying \$24.4 billion in wages and salaries. The total output impact rose by 5.3 percent from 2018 to 2019 while the employment and income impacts rose by 3.5 percent and 5.4 percent, respectively (see **Table ES-4**).

On an industry basis, the services and government sector accounted for the largest proportion of the total economic impacts with \$19.4 billion in output generating 247,750 jobs paying almost \$12.0 billion in wages and salaries. The services and government sector accounted for approximately 35 percent of the national output impacts, 56 percent of the total employment impacts and 49 percent of the total income impacts.

Table ES-4 –Total Economic Contribution of the International Cruise Industry in 2019

Sector	Industry Output \$ Millions	Employment	Wage Income \$ Millions
Agriculture, Mining, Utilities & Construction	\$ 5,045	7,207	\$ 618
Manufacturing	\$ 13,201	40,802	\$ 3,170
Food & Beverages	\$ 901	4,525	\$ 228
Apparel & Textiles	\$ 1,270	2,923	\$ 151
Paper and Printing	\$ 346	1,779	\$ 116
Chemicals & Plastics	\$ 561	2,941	\$ 275
Petroleum Refining	\$ 1,016	687	\$ 61
Fabricated Metal Products	\$ 1,053	5,988	\$ 432
Industrial Machinery	\$ 1,026	3,205	\$ 242
Transportation Equipment	\$ 2,067	3,447	\$ 434
Computers & Electronic Equipment	\$ 3,685	4,589	\$ 574
Other Manufacturing	\$ 1,275	10,718	\$ 657
Wholesale & Retail Trade	\$ 3,425	38,604	\$ 2,131
Transportation	\$ 8,535	84,909	\$ 4,295
Information Services	\$ 1,015	3,901	\$ 406
Finance, Insurance, Real Estate & Leasing	\$ 4,803	18,430	\$ 1,816
Services & Government	\$ 19,436	242,756	\$ 11,962
Professional, Scientific & Technical Services	\$ 5,842	39,757	\$ 3,032
Administrative & Waste Management Services	\$ 4,686	65,523	\$ 2,106
Accommodations & Food Services	\$ 2,644	51,275	\$ 1,290
Performing Arts & Amusements	\$ 1,000	18,484	\$ 483
Other Services & Government	\$ 5,264	67,718	\$ 5,052
Total - 2019	\$ 55,460	436,611	\$ 24,399
Total - 2018	\$ 52,672	421,711	\$ 23,151
Percentage Change from 2018	5.3%	3.5%	5.4%

Source: Business Research & Economic Advisors.

The manufacturing sector, with \$13.2 billion in output generated by cruise industry expenditures, accounted for 24 percent of the total output impact. The 40,800 manufacturing jobs accounted for 9.3 percent of the total employment, and the \$3.2 billion in wages comprise 13 percent of the total wage income impacts.

The transportation sector, which includes cruise lines and ports, benefited from \$8.5 billion in output, 84,900 jobs and \$4.3 billion in wages and salaries. As in 2018, this sector once again accounted for over 15 percent of the total economic impacts of the cruise industry in the U.S.

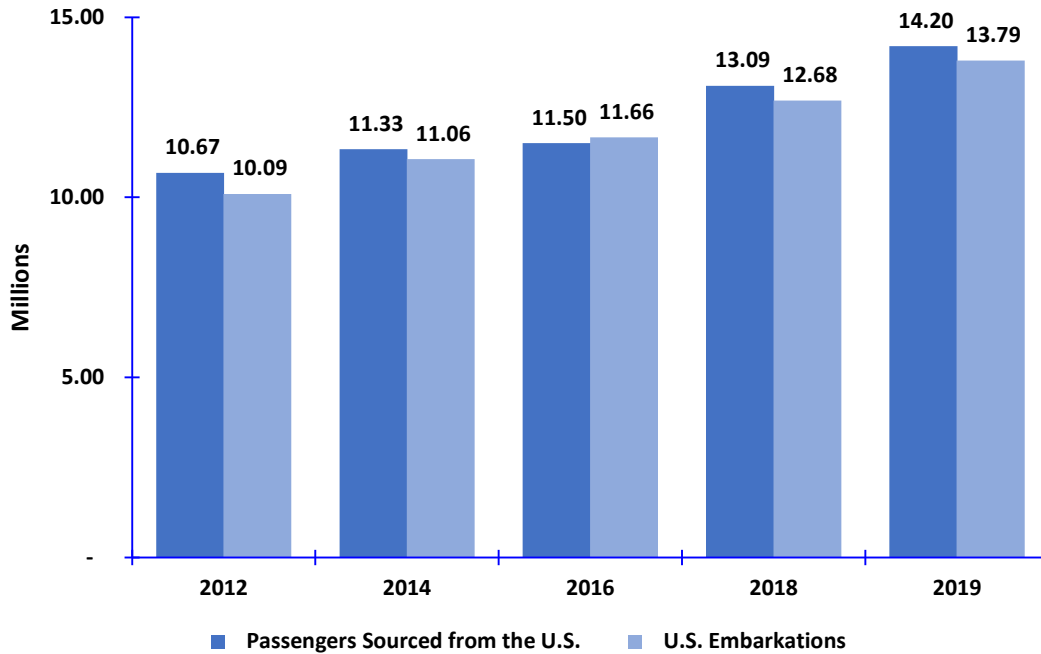
The following are the major conclusions of the analysis of the cruise industry economic operations and impacts in the U.S. during 2019:

- An estimated 14.20 million cruise passengers were sourced from the U.S.
- A total of 13.79 million cruise passengers embarked on their cruises from U.S. ports during 2019. Florida, whose ports handled nearly 8.3 million embarkations, accounted for about 60 percent of all U.S. cruise embarkations.
- The cruise lines and their passengers and crew directly spent \$25.1 billion on goods and services in the U.S., a 4.9 percent increase from 2018. The cruise lines spent \$20.0 billion while passengers and crew spent \$5.1 billion.
- Within the U.S., spending by the cruise lines with their direct suppliers was up from \$11.7 billion in 2018 to \$12.5 billion in 2019.
- The cruise industry generated the direct employment of an estimated 178,100 workers with U.S. businesses, who, in return, received \$8.7 billion in wages and salaries during 2019.
- Including the indirect and induced economic impacts, the spending of the cruise lines and their crew and passengers was responsible for the generation of \$55.5 billion in total output in the U.S., a 5.3 percent increase from 2018.
- Including the indirect and induced economic impacts, the spending of the cruise lines and their crew and passengers in 2019 was responsible for the generation of 436,600 total jobs throughout the country. This represents a 3.5 percent increase over 2018.
- Total wages and salaries paid to these workers was \$24.4 billion, an increase of 5.4 percent over 2018.

Trends: 2010 – 2019

In 2019, 14.2 million cruise passengers were sourced from the U.S. As shown in **Figure ES-1**, U.S.-sourced cruise passengers have been steadily increasing with an average annual growth of 4.2 percent over the 2012-2019 timeframe. Each measure experienced a new high in U.S.-sourced passengers throughout this timeframe.

Figure ES-1 – U.S. Cruise Passenger Statistics, 2010 – 2019



Source: CLIA

Embarkations from U.S. ports also increased from 2012 to 2019 with an annual average of 4.6 percent, including an increase of 8.8 percent increase from 2018 to 2019.

Thus, an increasing number of passengers are sourced by the international cruise industry from the U.S. for cruises around the globe. At the same time, an increasing number of passengers from the U.S. and elsewhere are beginning their cruises from ports in the U.S.

As a result of these cruises, the cruise lines and their passengers and crew not only purchase goods and services, such as food and beverages, hotel supplies and equipment to name a few, from businesses around the world, but the U.S., in particular. In 2012, U.S. businesses received an estimated \$19.3 billion in direct cruise expenditures (see **Table ES-5**). By 2019, these direct expenditures had increased by 28 percent to \$25.1 billion. Thus, as the number of passengers sourced from the U.S. and embarking on cruises from U.S. ports has increased,

so too has the industry's expenditures with U.S. businesses. Since 2012, these direct expenditures have increased at an average annual rate of 3.6 percent.

Table ES-5 – The Economic Impact of Cruise Industry Expenditures in the U.S. 2010 – 2019

	2012	2014	2016	2018	2019	Percent Change from Previous Period			
						2014	2016	2018	2019
Passengers Sourced from the U.S.	10.67	11.33	11.50	13.09	14.20	6.1%	1.5%	23.4%	8.4%
Direct Economic Impacts									
Direct Cruise Industry Expenditures (\$ B)	\$19.63	\$21.02	\$21.69	\$23.95	\$25.14	7.1%	3.2%	15.9%	4.9%
Employment	146,785	152,272	158,226	172,326	178,104	3.7%	3.9%	12.6%	3.4%
Wages and Salaries (\$ B)	\$ 6.39	\$ 7.02	\$ 7.38	\$ 8.32	\$ 8.75	9.8%	5.2%	18.5%	5.1%
Total Economic Impacts									
Total Output (\$ B)	\$42.27	\$46.09	\$47.76	\$52.67	\$55.46	9.1%	3.6%	16.1%	5.3%
Employment	356,311	373,738	389,432	421,711	436,611	4.9%	4.2%	12.1%	3.5%
Wages and Salaries (\$ B)	\$17.42	\$19.43	\$20.57	\$23.15	\$24.40	11.5%	5.9%	18.6%	5.4%

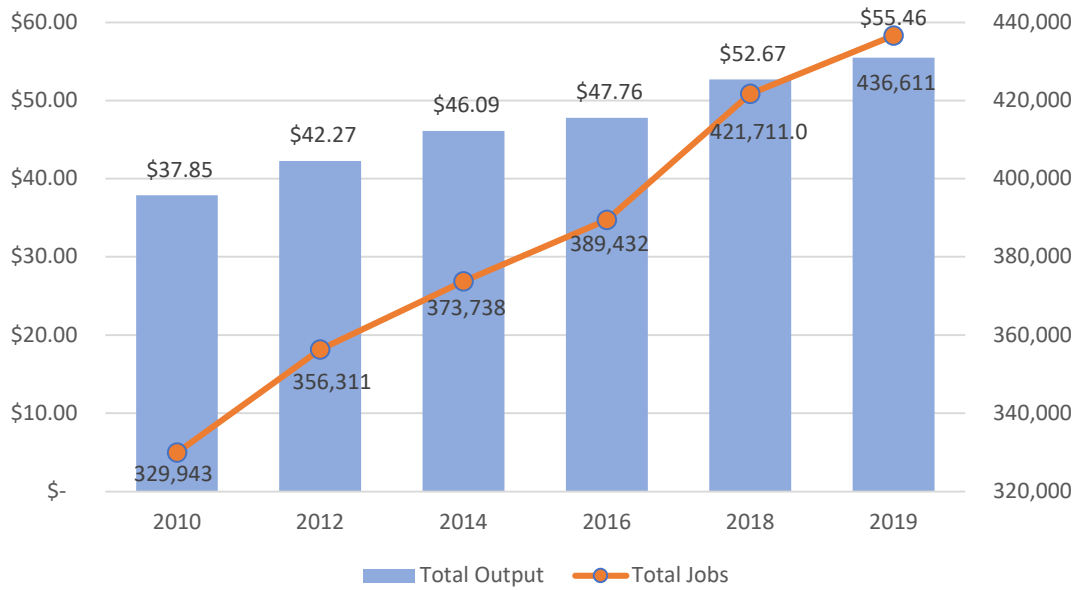
Source: Business Research & Economic Advisors

As the direct expenditures of the international cruise industry with U.S. businesses have grown since 2012, so has the industry's economic impact on the U.S. economy. As discussed, the total economic impacts are the sum of the direct, indirect and induced impacts that result from the direct expenditures. Since 2012, the total economic impact of the cruise industry has increased each year, growing from \$42.3 billion in 2012 to \$55.5 billion in 2019 (see **Table ES-5**). Over this timeframe, the total output that has resulted from cruise-related spending in the U.S. has increased by 31 percent, or at an average annual rate of 4.0 percent.²

Also shown in **Figure ES-2**, the total employment impact of the international cruise industry has followed a similar pattern, increasing from 356,300 jobs in 2012 to 436,600 jobs by 2019. The total employment impact due to the cruise industry expenditures in the U.S. has increased by 23 percent since 2012, or 2.9 percent per year.

² These figures are not adjusted for inflation.

Figure ES-2 – Total Economic Impact of the International Cruise Industry, 2010 – 2019



Source: Business Research & Economic Advisors

The Contribution of the International Cruise Industry to Individual State Economies

The economic impact of the international cruise industry spread into every state’s economy. Cruise passengers came from virtually every state, and the cruise lines made purchases in support of their operations in just about every state. The principal location factors that influenced the economic impacts by state were:

- cruise lines’ headquarters and other facilities;
- ports-of-embarkation and ports-of-call;
- place of residence of cruise passengers; and
- place of business of cruise industry vendors.

As shown in **Table ES-6** and **Figure ES-3**, nearly 13.8 million cruise passengers embarked on their cruises from U.S. ports in 2019. The top 10 U.S. cruise ports accounted for 87 percent of 2019 embarkations, unchanged from 2018.

Florida remains the center of cruising in the U.S., accounting for over 60 percent of all U.S. embarkations. Passenger embarkations from Florida increased by 10 percent from 2018 to 2019 to 8.3 million. Miami continues to lead the Florida ports with 3.4 million embarkations in 2019. Port Canaveral continues as the second largest U.S. port with 2.2 million

embarkations. Since 2012, Florida ports have experienced a combined 36 percent increase in passenger embarkations.

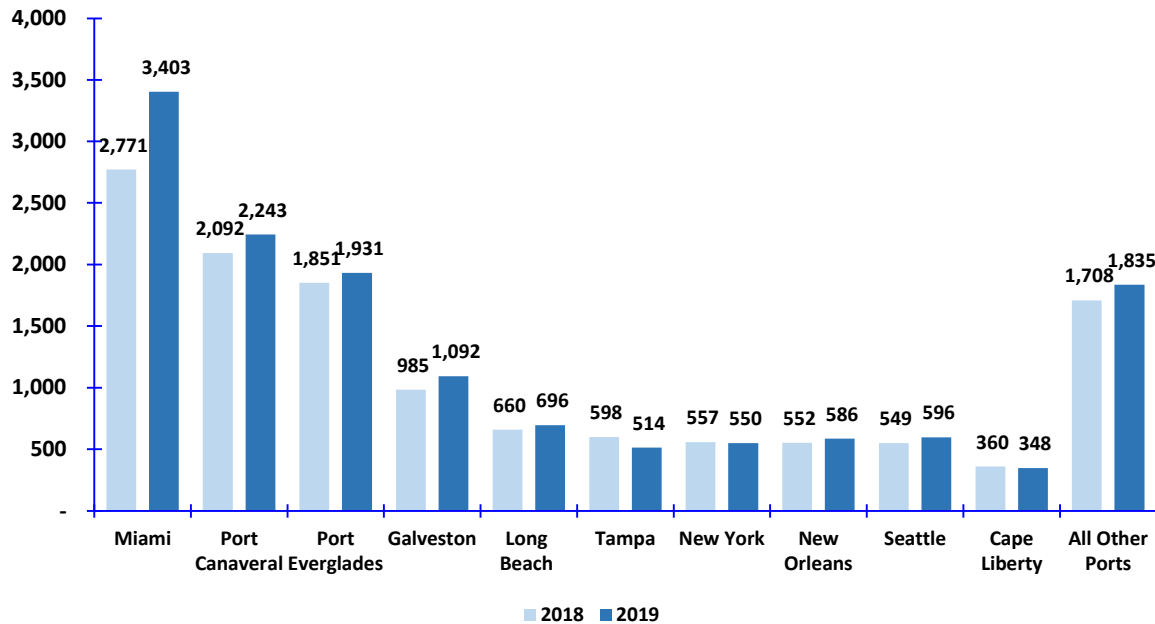
Table ES-6 – U.S. Embarkations by Top 10 Ports, 2012 – 2019

Port	2012	2014	2016	2018	2019	Growth			
						2014	2016	2018	2019
Miami	1,887,000	2,549,000	2,551,000	2,771,000	3,403,000	35.1%	0.1%	8.6%	22.8%
Port Canaveral	1,708,000	1,769,000	2,088,000	2,092,000	2,243,000	3.6%	18.0%	0.2%	7.2%
Port Everglades	1,797,000	1,940,000	1,840,000	1,851,000	1,931,000	8.0%	18.0%	0.2%	7.2%
Galveston	604,000	642,000	869,000	985,000	1,092,000	6.3%	35.4%	13.3%	10.9%
Long Beach	457,000	549,000	591,000	660,000	696,000	20.1%	7.7%	11.7%	5.5%
Tampa	487,000	451,000	405,000	598,000	514,000	-7.4%	-10.2%	47.7%	-14.0%
New York	586,000	576,000	499,000	557,000	550,000	-1.7%	-13.4%	11.6%	-1.3%
New Orleans	488,000	502,000	534,000	552,000	586,000	2.9%	6.4%	3.4%	6.2%
Seattle	464,000	408,000	484,000	549,000	596,000	-12.1%	18.6%	13.4%	8.6%
Cape Liberty	238,700	224,100	254,700	360,000	348,000	-6.1%	13.7%	41.3%	-3.3%
All Other Ports	1,378,300	1,453,900	1,542,300	1,708,000	1,835,000	5.5%	6.1%	10.7%	7.4%
United States	10,095,000	11,064,000	11,658,000	12,683,000	13,794,000	9.6%	5.4%	8.8%	8.8%
Top 10 Ports	8,716,700	9,610,100	10,115,700	10,975,000	11,959,000	10.2%	5.3%	8.5%	9.0%
Share of the U.S.	86.3%	86.9%	86.8%	86.5%	86.7%				
Florida Ports	6,074,000	6,891,000	7,079,000	7,512,000	8,286,000	13.5%	2.7%	6.1%	10.3%
Share of the U.S.	60.2%	62.3%	60.7%	59.2%	60.1%				

Source: U.S. Cruise Ports and BREAA

Embarkations from California's ports (Los Angeles, Long Beach, San Diego and San Francisco) have increased by 12 percent since 2018 to 1.3 million.

There were also significant developments among the other key ports. Embarkations from Galveston increased by about 10 percent to nearly 1.1 million. Seattle's embarkations continue to increase, increasing to about 596,000, a new high. Seattle's increase is also interrelated with the increase in passenger visits and crew arrivals to Alaska. New York's two cruise terminals and New Jersey's Cape Liberty experienced slight decreases in their embarkations to 550,500 and 348,200, respectively.

Figure ES-3– U.S. Embarkations by Top 10 Port, 2018 and 2019 (Thousands)

Source: U.S. Cruise Ports

The major economic impacts of the international cruise industry by state during 2019 as shown in **Table ES-7** were as follows:

- The economic impacts were concentrated in 10 states. These states accounted for 77 percent of the cruise industry's direct purchases in the U.S., 78 percent of the total employment impact and 79 percent of the income impact.
- As seen in state **Table 11**, the total cruise passenger visits and crew arrivals to Florida were nearly 13.6 million in 2019. Florida ports accounted for 47 percent of all passenger visits and crew arrivals in the U.S during 2019. Passengers, crew and cruise lines combined to directly spend \$9.0 billion in Florida, up 6.5 percent over 2018. Florida accounted for 36 percent of the industry's direct expenditures. This direct spending generated nearly 159,000 total jobs paying \$8.1 billion in income. In addition, the state of Florida, which is the home of corporate or administrative offices for most of the cruise lines, accounted for an estimated 59 percent of the cruise lines' U.S.-based employment, and 68 percent of the cruise lines' U.S.-based wages during 2019.
- California, similar to Florida, hosts both cruise line headquarters and ports-of-embarkation. California ports continue to add passengers and crew. During 2019, cruise passenger visits and crew arrivals totaled just over 2.3 million (**Table 12**). Overall, passenger visits and crew arrivals were up more than 7 percent in 2019 over 2018. With

just over 10 percent of the industry's direct expenditures, California businesses received \$2.6 billion in direct industry spending, which, in turn, generated 50,200 jobs paying \$3.3 million in wages.

Table ES-7 – Direct Expenditures and Total Employment and Wage Impacts of the International Cruise Industry for All States, 2019

State	2019	2018	Direct Purchases (\$ Millions)	Share of U.S.	Total Emp	Share Of U.S.	Total Income	Share Of U.S.	Avg Wage
Florida	1	1	\$ 9,043	36.0%	158,992	36.4%	\$ 8,063	33.0%	\$ 50.7
California	2	2	\$ 2,596	10.3%	50,193	11.5%	\$ 3,318	13.6%	\$ 66.1
Texas	3	3	\$ 1,610	6.4%	26,872	6.2%	\$ 1,815	7.4%	\$ 67.6
New York	4	4	\$ 1,309	5.2%	17,366	4.0%	\$ 1,157	4.7%	\$ 66.6
Alaska	5	5	\$ 1,276	5.1%	23,008	5.3%	\$ 1,226	5.0%	\$ 53.3
Washington	6	6	\$ 1,079	4.3%	22,750	5.2%	\$ 1,345	5.5%	\$ 59.1
Georgia	7	7	\$ 772	3.1%	14,233	3.3%	\$ 799	3.3%	\$ 56.2
Illinois	8	8	\$ 619	2.5%	9,935	2.3%	\$ 646	2.6%	\$ 65.0
New Jersey	9	9	\$ 526	2.1%	9,609	2.2%	\$ 581	2.4%	\$ 60.5
Louisiana	10	10	\$ 491	2.0%	9,012	2.1%	\$ 397	1.6%	\$ 44.1
Hawaii	11	12	\$ 464	1.8%	7,059	1.6%	\$ 261	1.1%	\$ 37.0
Pennsylvania	12	11	\$ 463	1.8%	7,286	1.7%	\$ 449	1.8%	\$ 61.6
Colorado	13	13	\$ 415	1.6%	2,823	0.6%	\$ 180	0.7%	\$ 63.9
Massachusetts	14	14	\$ 388	1.5%	5,830	1.3%	\$ 427	1.7%	\$ 73.2
Indiana	15	15	\$ 346	1.4%	8,473	1.9%	\$ 449	1.8%	\$ 53.0
North Carolina	16	16	\$ 308	1.2%	4,650	1.1%	\$ 231	0.9%	\$ 49.8
Michigan	17	17	\$ 285	1.1%	3,906	0.9%	\$ 228	0.9%	\$ 58.4
Virginia	18	21	\$ 262	1.0%	3,812	0.9%	\$ 231	0.9%	\$ 60.7
Ohio	19	20	\$ 255	1.0%	4,840	1.1%	\$ 248	1.0%	\$ 51.3
Arizona	20	19	\$ 247	1.0%	4,188	1.0%	\$ 196	0.8%	\$ 46.7
Maryland	21	18	\$ 242	1.0%	3,890	0.9%	\$ 223	0.9%	\$ 57.4
Connecticut	22	22	\$ 237	0.9%	1,968	0.5%	\$ 175	0.7%	\$ 89.1
Oregon	23	23	\$ 196	0.8%	5,608	1.3%	\$ 287	1.2%	\$ 51.1
Alabama	24	24	\$ 195	0.8%	2,830	0.6%	\$ 138	0.6%	\$ 48.6
South Carolina	25	26	\$ 178	0.7%	3,474	0.8%	\$ 142	0.6%	\$ 40.9
Missouri	26	25	\$ 169	0.7%	3,812	0.9%	\$ 202	0.8%	\$ 52.9
Minnesota	27	27	\$ 133	0.5%	2,522	0.6%	\$ 154	0.6%	\$ 61.0
Tennessee	28	28	\$ 112	0.4%	2,038	0.5%	\$ 96	0.4%	\$ 46.9
Nevada	29	29	\$ 108	0.4%	1,616	0.4%	\$ 76	0.3%	\$ 46.7
Wisconsin	30	30	\$ 73	0.3%	1,260	0.3%	\$ 59	0.2%	\$ 46.7
Kentucky	31	32	\$ 70	0.3%	1,589	0.4%	\$ 72	0.3%	\$ 45.1
Maine	32	31	\$ 68	0.3%	1,021	0.2%	\$ 36	0.1%	\$ 35.3
Mississippi	33	37	\$ 64	0.3%	824	0.2%	\$ 32	0.1%	\$ 38.8
Kansas	34	33	\$ 63	0.3%	1,981	0.5%	\$ 98	0.4%	\$ 49.4
Utah	35	34	\$ 60	0.2%	1,426	0.3%	\$ 61	0.2%	\$ 42.5
Oklahoma	36	35	\$ 53	0.2%	1,083	0.2%	\$ 48	0.2%	\$ 43.9
Iowa	37	38	\$ 49	0.2%	453	0.1%	\$ 19	0.1%	\$ 42.1
Dist. of Col.	38	36	\$ 48	0.2%	297	0.1%	\$ 44	0.2%	\$148.4
Arkansas	39	39	\$ 38	0.1%	732	0.2%	\$ 28	0.1%	\$ 38.7
Delaware	40	41	\$ 36	0.1%	324	0.1%	\$ 20	0.1%	\$ 60.9
New Hampshire	41	40	\$ 35	0.1%	395	0.1%	\$ 23	0.1%	\$ 58.2
Nebraska	42	42	\$ 30	0.1%	574	0.1%	\$ 28	0.1%	\$ 49.0
Rhode Island	43	43	\$ 30	0.1%	446	0.1%	\$ 19	0.1%	\$ 43.6
New Mexico	44	44	\$ 20	0.1%	315	0.1%	\$ 16	0.1%	\$ 52.0
Idaho	45	45	\$ 19	0.1%	357	0.1%	\$ 15	0.1%	\$ 43.1
West Virginia	46	46	\$ 15	0.1%	320	0.1%	\$ 14	0.1%	\$ 43.1
Vermont	47	47	\$ 14	0.1%	100	0.0%	\$ 6	0.0%	\$ 59.6
North Dakota	48	48	\$ 10	0.0%	207	0.0%	\$ 7	0.0%	\$ 35.9
South Dakota	49	50	\$ 8	0.0%	118	0.0%	\$ 4	0.0%	\$ 36.8
Montana	50	49	\$ 8	0.0%	133	0.0%	\$ 6	0.0%	\$ 45.7
Wyoming	51	51	\$ 4	0.0%	61	0.0%	\$ 3	0.0%	\$ 52.5
U. S. Total			\$ 25,136		436,611		\$24,399		\$ 55.9

Source: Business Research and Economic Advisors

- It is estimated that nearly 1.6 million passengers and crew visited Texas during 2019, up 11 percent from 1.3 million in 2018 (see **Table 13**). This represents 5.3 percent of all passenger visits and crew arrivals at U.S. ports. With \$1.6 billion in direct spending and 26,900 jobs paying \$1.8 billion in income, Texas accounted for 6.4 percent of the industry's direct expenditures, 6.2 percent of the industry's total employment impact and 7.4 percent of the income impact.
- In 2019, an estimated 843,000 passengers and crew visited New York down slightly from 2018 (**Table 14**). This represented 2.9 percent of total passenger visits and crew arrivals in the U.S. New York accounted for 5.2 percent of the industry's direct expenditures with \$1.3 billion in 2019. This spending generated an estimated 17,400 jobs paying \$1.2 billion in income.
- Alaska benefits from the cruise industry primarily as a destination market. During 2019, the cruise industry produced 6.1 million passenger visits and crew arrivals to Alaska destinations (see **Table 15**), an 8.3 percent increase from 2018. The state primarily benefits from cruise passenger spending for shore excursions, pre- and post-cruise stays, food and beverages and general retail. Because of this spending, Alaska accounted for 5.1 percent of the industry's direct spending with \$1.3 billion in expenditures generating 23,000 full- and part-time jobs paying about \$1.2 billion in wage income.
- The state of Washington is the location of cruise industry administrative facilities and a port-of-embarkation in Seattle. During 2019 an estimated 876,000 passengers and crew visited Seattle (see **Table 16**). With \$1.1 billion in direct spending and nearly 22,800 jobs paying \$1.3 billion in income, Washington accounted for approximately 4.3 percent of the industry's national economic impact.
- Georgia is a major source market for cruise passengers and supports the industry with a wide range of goods and services. During 2019, 626,000 residents of Georgia cruised (see **Table 17**). This represented 4.4 percent of U.S. sourced passengers. As a result of the activity of the cruise industry, Georgia businesses received \$772 million, or 3.1 percent of the direct expenditures generated by the cruise industry in the U.S. These direct expenditures generated total economic impacts of 14,200 jobs and \$799 million in wages and salaries throughout the Georgia economy during 2019.
- Similar to Georgia, Illinois has no direct cruise operations, but rather is a net exporter of cruise passengers. It also supports the industry with a wide range of goods and services. Resident cruise passengers in Illinois totaled 351,000 during 2019, up 8 percent from 2018 (see **Table 18**). This accounted for 2.5 percent of U.S. sourced passengers. As a result of the activity of the cruise industry, Illinois businesses received \$619 million, or 2.5 percent of the direct expenditures generated by the cruise industry in the U.S.

These direct expenditures generated total economic impacts of 9,900 jobs and \$646 million in income throughout the Illinois economy during 2019.

- In 2019, an estimated 533,000 passengers and crew visited New Jersey (see **Table 19**). This represents 1.8 percent of total passenger visits and crew arrivals in the U.S. and a 3.9 percent increase from 2018. New Jersey accounted for 2.1 percent of the industry's direct expenditures with \$526 million. This spending generated an estimated 9,600 jobs paying \$581 million in income.
- An estimated 862,000 passengers and crew visited the Port of New Orleans during 2019, up about 8.6 percent from 2018 (see **Table 20**). Louisiana accounted for \$491 million in direct expenditures, or about 2.0 percent of the industry's direct expenditures. This, in turn helped generate nearly 9,000 jobs paying \$397 million in wages.
- The impacts in the remaining states were primarily generated by cruise passenger spending for air travel and cruise line purchases from vendors located in each state.

Section I: Impact of the International Cruise Industry on the U.S. Economy in 2019

The contribution of the international cruise industry is the result of spending by the cruise lines and their passengers and crew. In this section, passengers sourced from the U.S., passenger embarkations from U.S. ports, crew arrivals at U.S. ports and the spending activity of the industry are detailed.

U.S. Cruise Passengers

As shown in **Table 1**, passenger embarkations at U.S. ports increased from 10.1 million in 2012 to 13.8 million in 2019, a 37 percent increase. As was seen in previous years, there was significant variation in growth among the cruise ports within the United States. Driven by the growth seen in Miami and Port Canaveral, passenger embarkations in Florida increased 10 percent from 7.5 million in 2018 to nearly 8.3 million in 2019. Since 2012, passenger embarkations in Florida have increased 36 percent; yet Florida's share of total U.S. embarkations has remained virtually unchanged at about 60 percent.

Table 1 – U.S. Embarkations of the International Cruise Industry, 2010 – 2019

Port						Growth			
	2012	2014	2016	2018	2019	2014	2016	2018	2019
Florida	6,074,000	6,891,000	7,079,000	7,512,000	8,286,000	13.5%	2.7%	6.1%	10.3%
Miami	1,887,000	2,549,000	2,551,000	2,771,000	3,403,000	35.1%	0.1%	8.6%	22.8%
Port Canaveral	1,708,000	1,769,000	2,088,000	2,092,000	2,243,000	3.6%	18.0%	0.2%	7.2%
Port Everglades	1,797,000	1,940,000	1,840,000	1,851,000	1,931,000	8.0%	-5.2%	0.6%	4.3%
Tampa	487,000	451,000	405,000	598,000	514,000	-7.4%	-10.2%	47.7%	-14.0%
Jacksonville	195,000	182,000	195,000	200,000	195,000	-6.7%	7.1%	2.6%	-2.5%
California	837,000	984,000	1,058,000	1,117,000	1,253,000	17.6%	7.5%	5.6%	12.2%
Long Beach	457,000	549,000	591,000	660,000	696,000	20.1%	7.7%	11.7%	5.5%
Los Angeles	213,000	291,000	300,000	247,000	311,000	36.6%	3.1%	-17.7%	25.9%
San Diego	105,000	49,000	55,000	107,000	145,000	-53.3%	12.2%	94.5%	35.5%
San Francisco	62,000	95,000	112,000	103,000	101,000	53.2%	17.9%	-8.0%	-1.9%
New York	586,000	576,000	499,000	557,000	550,000	-1.7%	-13.4%	11.6%	-1.3%
Other U.S. Ports	2,598,000	2,613,000	3,022,000	3,497,000	3,705,000	0.6%	15.7%	15.7%	5.9%
Galveston	604,000	642,000	869,000	985,000	1,092,000	6.3%	35.4%	13.3%	10.9%
New Orleans	488,000	502,000	534,000	552,000	586,000	2.9%	6.4%	3.4%	6.2%
Seattle	464,000	408,000	484,000	549,000	596,000	-12.1%	18.6%	13.4%	8.6%
Baltimore	241,000	199,000	211,000	219,000	216,000	-17.4%	6.0%	3.8%	-1.4%
Other US Ports	801,000	862,000	924,000	1,192,000	1,215,000	7.6%	7.2%	29.0%	1.9%
United States	10,095,000	11,064,000	11,658,000	12,683,000	13,794,000	9.6%	5.4%	8.8%	8.8%

Source: Port Authorities and Business Research and Economic Advisors

Miami leads the Florida ports with 3.4 million embarkations, which is up by 23 percent from 2018. In part this growth is due to the opening Royal Caribbean's new terminal, which enabled the industry's largest ships to berth in Port Miami.

With over 2.2 million embarkations, Port Canaveral continued its hold as the second largest US port. Port Everglades continues as the third largest U.S. port with over 1.9 million embarkations, up 4.3 percent from 2018. Tampa saw its embarkations decrease from 598,000 to 514,000, and is now the 9th largest port of embarkation in the U.S., while Jacksonville saw its embarkations decrease slightly to 195,000 passengers.

Passenger embarkations in California's four cruise ports (Los Angeles, Long Beach, San Diego, and San Francisco) increased by 12 percent to almost 1.3 million passengers during 2019.

Passenger embarkations in Long Beach continued to rise in 2019; up 5.5 percent to 696,000 passengers. The Port of Los Angeles, the second largest of California's cruise ports saw its embarkations increase to about 311,000 passengers in 2019. San Diego experienced a large percentage increase in embarkations to 145,000. Finally, embarkations at San Francisco decreased by about 2 percent from 2018 to 101,000 passengers. This is the second consecutive year of decrease in embarkations in San Francisco.

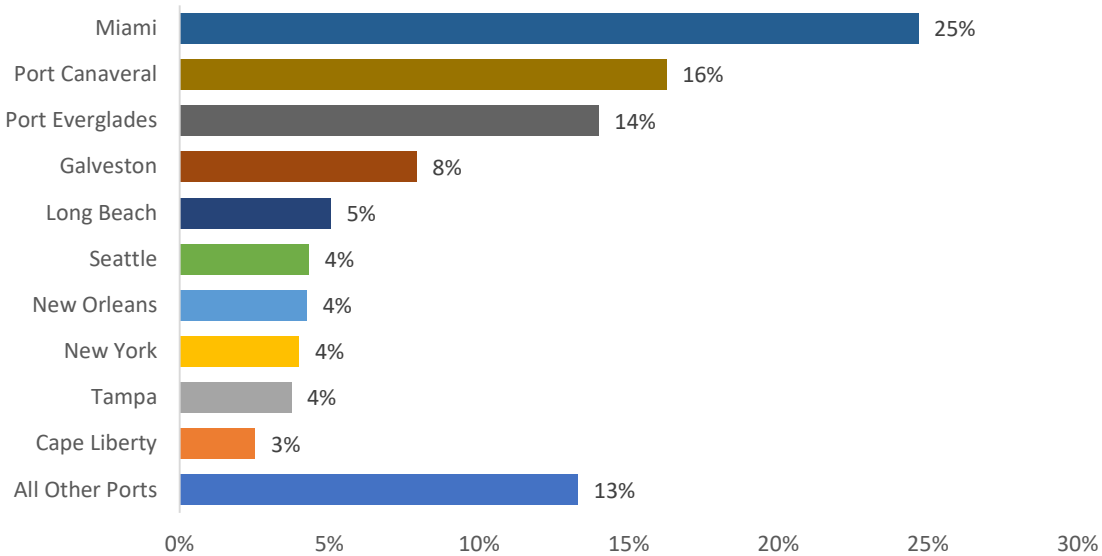
The total embarkations across Florida and California increased by 11 percent over 2018 and accounts for 82 percent of the total net increase in embarkations among all U.S. cruise ports. Combined the nine cruise ports of Florida and California account for 69 percent of the U.S. embarkations in 2019; virtually unchanged from the 2018 study.

While cruise activity in the remaining states is not as large as in Florida and California, there were significant developments among these ports as well. Galveston continues to climb, to nearly 1.1 million embarks, up 11 percent from 2018. New Orleans also saw its embarkations rise from 552,000 in 2018 to 586,000 in 2019, an increase of 8.6 percent.

Embarkations in Seattle increased by nearly 9 percent in 2019 to 596,000.

In New York, embarkations at its cruise terminals in Manhattan and Brooklyn decreased by 1.3 percent to 550,000 passengers during 2019. **Figure 1** shows the distribution of US embarkations for the Top 10 ports and all others.

Figure 1 - Distribution of U.S. Embarkations – 2019



Source: Port Authorities and Business Research and Economic Advisors

As shown in **Table 2**, 14.2 million cruise passengers were sourced from the United States including Puerto Rico. This represented a 8.4 percent increase from 2018.

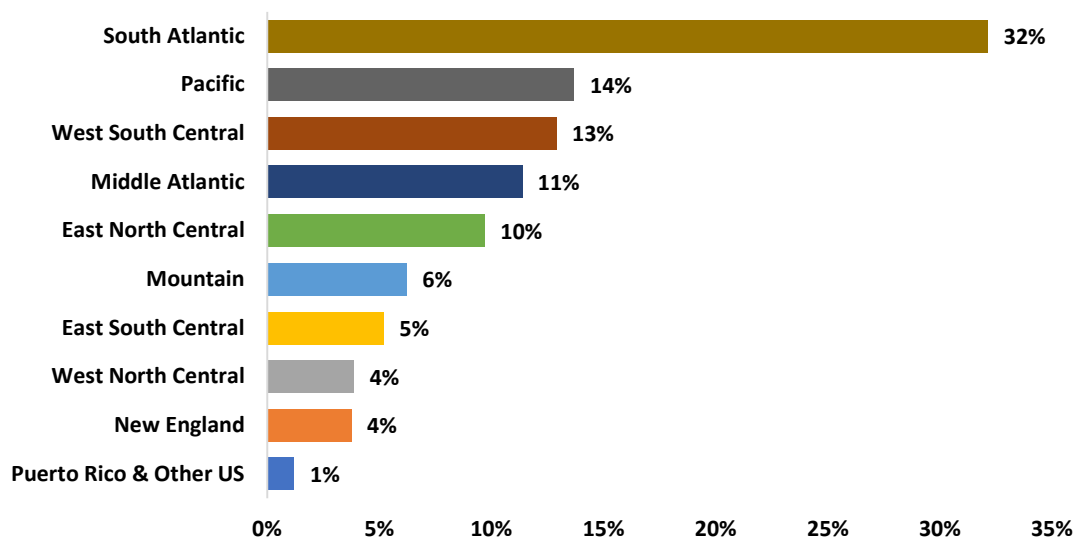
A total of 4.6 million passengers were sourced from the states of the South Atlantic region. This represents about 32 percent of the total. The Pacific region, with 1.9 million passengers, is second, with about 14 percent of the U.S. total. With a total of more than 6.5 million cruise passengers, these two regions accounted for 46 percent of all cruise passengers sourced from the United States, unchanged from 2018.

The next two largest regions, the West South Central and Middle Atlantic regions, generated more than 1.8 million and 1.6 sourced passengers, respectively. Combined, the two accounted for a total of 3.4 million cruise passengers, representing 24 percent of all passengers sourced from the United States. **Figure 2** on the next page shows the percentage distribution of US sourced passengers for the 10 regions.

Table 2 –Cruise Passengers Sourced from the United States, 2013 – 2019³

Census Divisions	Passengers					Share of the U.S.				
	2013	2014	2016	2018	2019	2013	2014	2016	2018	2019
South Atlantic	4,167,300	4,503,540	4,236,127	4,213,572	4,562,527	38.9%	39.8%	36.8%	32.2%	32.1%
Pacific	1,389,300	1,623,705	1,730,795	1,849,352	1,943,521	13.0%	14.3%	15.0%	14.1%	13.7%
West South Central	1,383,000	1,471,633	1,419,082	1,624,426	1,831,051	12.9%	13.0%	12.3%	12.4%	12.9%
Middle Atlantic	841,800	785,388	1,065,486	1,530,796	1,614,053	7.9%	6.9%	9.3%	11.7%	11.4%
East North Central	548,200	528,609	821,669	1,246,778	1,376,505	5.1%	4.7%	7.1%	9.5%	9.7%
Mountain	925,000	992,535	626,524	783,521	883,228	8.6%	8.8%	5.4%	6.0%	6.2%
East South Central	250,600	252,147	447,592	672,650	736,218	2.3%	2.2%	3.9%	5.1%	5.2%
West North Central	264,300	252,987	331,471	496,590	547,964	2.5%	2.2%	2.9%	3.8%	3.9%
New England	855,500	836,984	604,759	507,951	532,349	8.0%	7.4%	5.3%	3.9%	3.7%
Puerto Rico & Other	84,000	80,179	219,848	169,108	171,230	0.8%	0.7%	1.9%	1.3%	1.2%
United States	10,709,000	11,327,707	11,503,353	13,094,744	14,198,646	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Cruise Lines International Association

Figure 2 – Distribution of Cruise Passengers Sourced from the United States – 2019

Source: Cruise Lines International Association

³ The definitions of the nine census divisions are as follows:**New England:** Connecticut, Maine, Massachusetts, New Hampshire, Vermont and Rhode Island**Middle Atlantic:** New Jersey, New York and Pennsylvania**South Atlantic:** Delaware, DC, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia and West Virginia**East North Central:** Illinois, Indiana, Michigan, Ohio and Wisconsin**East South Central:** Alabama, Kentucky, Mississippi and Tennessee**West North Central:** Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota and South Dakota**West South Central:** Arkansas, Louisiana, Oklahoma and Texas**Mountain:** Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah and Wyoming**Pacific:** Alaska, California, Hawaii, Oregon and Washington.

As these data show, U.S. passengers come from all regions of the country with passenger growth reflecting both the changing deployment strategy of the cruise industry and the underlying population growth in each region. The number of cruise passengers sourced from the United States is more than the number of cruise passenger embarkations from U.S. ports, 14.2 million versus 13.8 million, thus, U.S. resident cruise passengers also provide an economic stimulus to embarkation ports outside the United States. Finally, with 13.8 million cruise embarkations from U.S. ports in 2019, the international cruise industry is a source of significant economic activity in the U.S. economy.

Spending in the U.S. Economy Generated by the Cruise Industry

Business Research and Economic Advisors (BREA) conducted a survey of the Member Cruise Lines of the Cruise Lines International Association (CLIA) that provides the basis for our estimates of the industry's 2019 expenditures for the operating and administrative expense categories outlined in **Table 3**. These data were collected for global payments and payments made to U.S. businesses in addition to other regions of the world. Data was received directly for 18 cruise brands. These brands were: AIDA Cruises, Azamara, Carnival Cruise Line, Carnival UK, Celebrity Cruises, Costa, Crystal Cruises, Disney Cruise Line, Fred Olsen, Hapag Lloyd, Holland America Line, Norwegian Cruise Lines, Oceania, Princess Cruises, Regent, Royal Caribbean International, Seabourn, and Silversea Cruises. In addition, BREA analyzed annual reports, 10K's and other financial reports to estimate spending for all missing lines.

Table 3 – Operating and Administrative Expense Categories

Operating Expenses	Administrative Expenses
Travel Agent Commissions	Marketing, Advertising & Promotion
Cost of Travel Insurance for Passengers	Other Cost of Sale
Customs/Immigration/Int'l Arrivals Fees Charges to Passengers	Accounting & Legal Services
Airfares Collected from Passengers	Computer/Internet Consulting Services
Costs of Pre-or Post-Cruise Packages Collected from Passengers	Financial Services
Food & Beverages	Other Professional Services
Fuel	Telephone
Port Charges & Fees	Travel & Entertainment
Restaurant/Hotel/Casino Supplies	Rent
Vessel Maintenance, Repair & Drydock Fees	Utilities
Vessel Insurance	Land-Side Employees Wages & Salaries
Maintenance Equipment & Supplies	Crew Wages & Salaries
Cost of Shore Excursions	

Source: Business Research and Economic Advisors

In addition to the aggregate revenue and expense data, more detailed data on vendor purchases were obtained from a smaller group of cruise lines. Vendor-specific data were obtained from the following cruise lines: Carnival Cruise Lines, Celebrity Cruises, Holland

America Line, Princess Cruises and Royal Caribbean International. These five cruise lines accounted for approximately 75 percent of the industry's non-wage U.S. operating and administrative expenses at the time of collection. These data were then aggregated by industry group and state and used to estimate total cruise industry expenditures by industry. These detailed expenditures accounted for about 65 percent of the total estimated expenditures made by the international cruise lines with U.S. businesses. The vendor purchases were aggregated into 95 industry sectors consistent with the 2019 U.S. input/output accounts.

The economic benefits that accrue to the U.S. economy arise from five principal sources of spending by the cruise industry and its passengers and crew:

- spending by cruise passengers and crew for goods and services associated with cruise ship arrivals at U.S. ports, including travel to the port of embarkation, pre- and post-cruise vacation spending, shore excursions, food and beverages and other retail;
- expenditures by the cruise lines for goods and services necessary for cruise operations, including food and beverages, fuel, vessel maintenance and repair, ship's supplies and so forth;
- spending by the cruise lines for port services at U.S. ports-of-embarkation and transit ports-of-call;
- the shore-side staffing by the cruise lines for their headquarters, marketing and tour operations; and
- capital expenditures for facilities constructed in the U.S., including port terminals, office facilities, and other capital equipment.

As shown in **Table 4**, the cruise lines spent an estimated \$18.1 billion with U.S. businesses during 2019, including nearly \$15.8 billion for goods and services and \$2.4 billion for capital expenditures. Overall, this represents a 2.9 percent increase from similar expenditures in 2018. Total spending by the cruise lines has increased each year since 2012. As a result, the 2019 spending by cruise lines reached a new peak and is 24 percent above the 2012 spend of \$14.6 billion.

Table 4 – U.S. Expenditures (\$ Billions) of the International Cruise Industry, 2012 – 2019

	2012	2014	2016	2018	2019	Growth			
						2014	2016	2018	2019
U.S. Purchases of Cruise Lines	\$14.63	\$15.63	\$16.02	\$17.61	\$18.12	3.6%	2.5%	10.0%	2.9%
Goods and Services	\$12.66	\$13.65	\$13.96	\$15.34	\$15.76	4.0%	2.2%	9.9%	2.7%
Capital Expenditures (incl. net int.)	\$ 1.97	\$ 1.98	\$ 2.06	\$ 2.27	\$ 2.36	1.1%	3.8%	10.2%	4.1%
Passengers and Crew	\$ 3.66	\$ 3.96	\$ 4.18	\$ 4.67	\$ 5.11	8.9%	5.8%	11.6%	9.4%
Wages & Taxes Paid by Cruise Lines	\$ 1.34	\$ 1.43	\$ 1.48	\$ 1.67	\$ 1.91	3.1%	3.9%	12.8%	12.8%
Total U.S.-based Spending	\$19.63	\$21.02	\$21.69	\$23.95	\$25.14	4.6%	3.2%	10.5%	4.9%

Source: Business Research and Economic Advisors

Cruise passengers and crew added \$5.1 billion in spending with U.S. businesses. Just over one-third (37%) of these expenditures represented airfares that were directly purchased by passengers. Of the remaining passenger and crew expenditures, just over were spent on sightseeing and lodging. The remainder mostly consisted of food and beverage and retail purchases. Passenger expenditures, excluding airfares, were made at the U.S. ports-of-embarkation and transit ports-of-call. The estimated \$5.1 billion in passenger and crew spending for 2019 increased by 9.4 percent from 2018, and represents a new high for passenger and crew spending in the United States.

Thus, excluding wages and taxes, the international cruise industry and its passengers and crew spent a total of \$23.2 billion for goods and services provided by U.S. businesses, a 4.3 percent increase from similar expenditures in 2018. It is also 27 percent above the 2012 level of \$18.3 billion.

In addition to the direct purchase of goods and services from U.S. businesses, the cruise industry made combined payments of \$1.9 billion in wages and benefits to its employees and taxes to federal, state and local governments in the United States. Wage and benefit payments accounted for about 90 percent of the total. The tax payments consisted primarily of employer contributions to Social Security and sales and property taxes paid to state and local governments. This represented a 13 percent increase from 2018.

Including wages and taxes, the international cruise industry and its passengers and crew made total payments of \$25.1 billion to U.S. businesses, U.S.-resident cruise line employees and U.S. taxing jurisdictions. This was a 4.9 percent increase from total spending by the international cruise industry in 2018.

Direct Economic Impacts in the United States During 2019

The direct economic impacts of the cruise industry in the United States are derived from a broad range of activities including:

- port services and cruise industry employment;
- transportation of cruise passengers from their place of residence to the ports of embarkation;
- travel agent commissions;
- spending for shore excursions and pre- and post-cruise stays in U.S. port cities;
- passenger and crew spending for retail goods in U.S. port cities; and
- purchases of supplies by the cruise lines from U.S. businesses.

As a result of this spending, an estimated 178,100 full and part-time jobs⁴ were generated, paying wages of \$8.7 billion during 2019.⁵ Thus, the 4.9 percent annual growth in direct industry expenditures resulted in a 3.4 percent increase in direct employment and a 5.1 percent increase in direct wage income relative to 2018. The slower growth in employment is primarily the result of the overall increase in labor productivity in all sectors, which reduced the number of employees per dollar of final demand. This increase in labor productivity also resulted in a higher increase in direct wage income relative to the direct employment gains (see **Table 5**).

⁴ Throughout this report all employment impacts are the sum of annualized full- and part-time jobs.

⁵ These figures include the U.S. employees of the cruise lines and the industry's trade associations and their wage income.

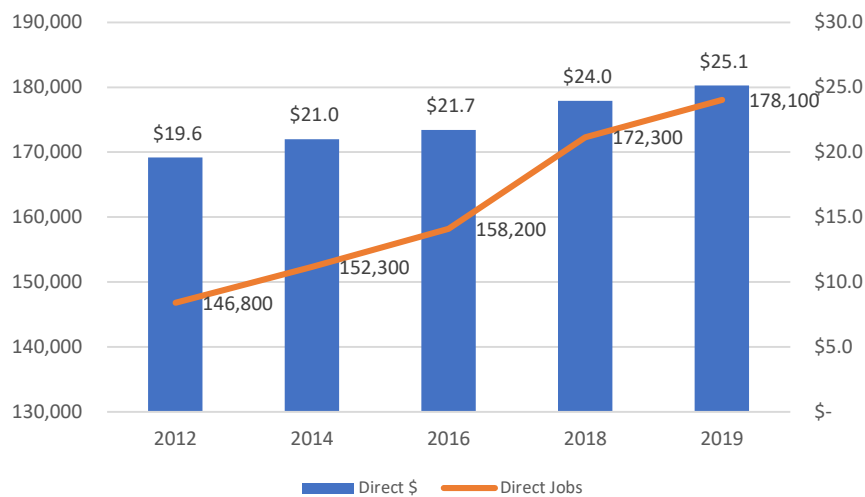
Table 5 – Direct Economic Impacts of the Cruise Industry in the United States – 2019

Sector	Direct Spending \$ Millions	Employment	Wage Income \$ Millions
Core Cruise Travel Sector	\$ 12,635	127,865	\$ 5,470
Passenger & Crew Spending	\$ 2,625	31,296	\$ 819
Port Services & Cruise Lines	\$ 4,351	55,196	\$ 2,651
Transportation Services	\$ 3,177	28,998	\$ 1,350
Air Transportation	\$ 2,482	12,375	\$ 650
Cruise Industry Suppliers	\$ 12,501	50,239	\$ 3,276
Agriculture, Mining, Utilities & Construction	\$ 48	201	\$ 7
Manufacturing	\$ 6,876	16,416	\$ 1,189
Food & Beverages	\$ 1,056	2,261	\$ 103
Apparel & Textiles	\$ 165	930	\$ 44
Chemicals & Plastics	\$ 343	412	\$ 42
Petroleum Refining	\$ 1,513	205	\$ 27
Fabricated Metal Products	\$ 539	1,863	\$ 125
Industrial Machinery	\$ 723	2,042	\$ 148
Ship Maintenance & Repair	\$ 1,526	3,393	\$ 273
Computers & Electronic Equipment	\$ 387	1,266	\$ 153
Other Manufacturing	\$ 623	4,044	\$ 275
Wholesale Trade	\$ 786	3,502	\$ 261
Other Transportation Services	\$ 25	35	\$ 4
Information Services	\$ 299	552	\$ 53
Finance, Insurance, Real Estate & Leasing	\$ 1,251	3,196	\$ 293
Services & Government (ex. Lodging & Travel Services)	\$ 3,217	26,337	\$ 1,468
Professional, Scientific & Technical Services	\$ 1,995	15,961	\$ 759
Administrative & Waste Management Services	\$ 55	249	\$ 17
Arts, Entertainment & Recreation	\$ 222	1,834	\$ 100
Other Services & Government	\$ 944	8,293	\$ 592
Total - 2019	\$ 25,136	178,104	\$ 8,746
Total - 2018	\$ 23,955	172,326	\$8,323
Percentage Change from 2018	4.9%	3.4%	5.1%

Source: Business Research and Economic Advisors

Figure 3 shows the direct cruise industry expenditures and direct employment impacts from 2012 through 2019. Direct cruise industry expenditures have increased each period, from \$19.6 billion in 2012 to \$25.1 billion in 2019, a 28 percent increase.

Similarly, the annual direct employment contribution has increased by more than 21 percent since 2010, rising from 146,800 to 178,100.

Figure 3– Direct Cruise Industry Expenditures and Employment, 2012 – 2019

Source: Business Research and Economic Advisors

The Core Cruise Travel Sector in the United States

The core cruise travel sector in the United States consists of the cruise lines, airlines, travel agents, port service providers and local businesses, such as hotels and restaurants that are directly impacted by passenger and crew spending. Businesses in these sectors of the U.S. economy received an estimated \$12.6 billion in direct spending by the cruise lines and their passengers and crew in 2019 (see **Table 5**). This, in turn, supported the employment of an estimated 127,900 workers, an increase of 3.0 percent from 2018, and \$5.5 billion in wage income, for an increase of 3.2 percent.

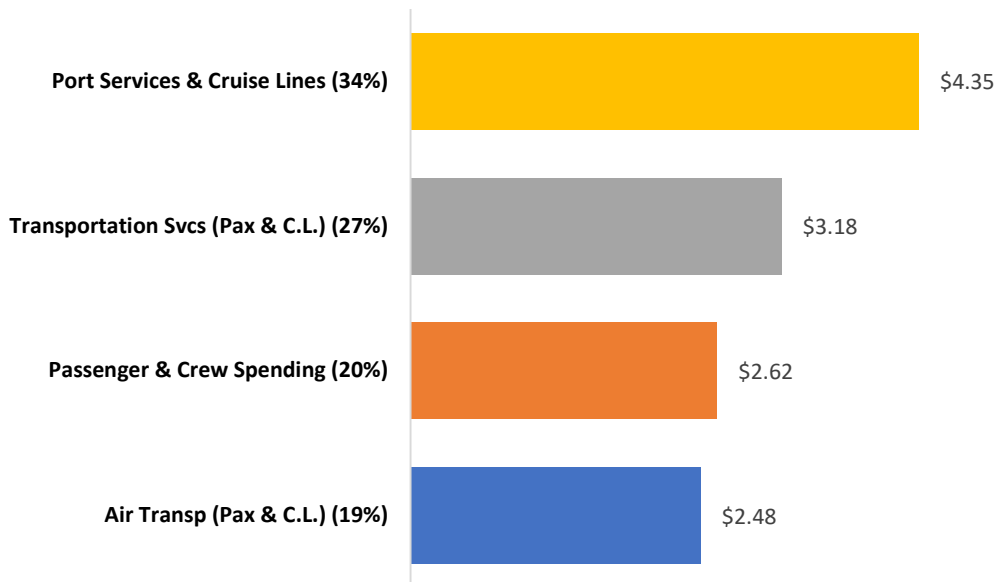
Spending in the core cruise travel sector totaled \$12.6 billion while the cruise industry purchased an additional \$12.5 billion in goods and services from its direct suppliers. Thus, the core cruise travel sector accounted for 50 percent of the direct spending by the cruise industry, 72 percent of the direct employment, and 63 percent of the direct wage income, all virtually unchanged from the 2018 study.

Port Services and Cruise Lines in the United States

Once again in 2019, cruise lines and port service providers were the leading components of the core cruise sector, accounting for 34 percent of cruise industry spending in the core cruise travel sector (see **Figure 4**). This segment of the core cruise sector includes two primary components: i) expenditures with U.S. cruise ports and their service providers, such as stevedores and pilots and ii) the direct U.S.-based employment and wages of the cruise industry, including the employment and income of the industry's trade associations.

Port service providers at each of the embarkation ports and transit ports-of-call in the United States provide a broad range of services including tugboat and piloting services, port agents, stevedores, passenger reception services, warehousing and other material handling services. Secondly, many of the major international cruise lines maintain administrative and marketing offices throughout the United States. While Florida hosts the majority of cruise headquarters, cruise line offices are also located in California and Washington. Additionally, the lines also maintain marketing and telephone centers in several other states, including Oregon, Kansas, and Arizona, and also have tour operations and support staff in Alaska and Hawaii. These employees and their wages are included in this sector. Third, industry trade associations maintain staff in Alaska, Florida and Washington, D.C. As with the cruise lines, the employees of these associations and their wages are also included in the core cruise travel sector.

Figure 4 – Distribution of Core Cruise Travel Sector Direct Spending – 2019 (\$12.6 Billion)



Source: Business Research and Economic Advisors

During 2019, the cruise industry spent \$4.4 billion on port services, up 4.4 percent from \$4.2 billion in 2018. As a result of these expenditures, port service providers, the cruise lines and their trade associations provided 55,200 full- and part-time jobs, and paid an annual income of almost \$2.7 billion.

On an industry basis, 76 percent of these jobs are found in the transportation sector, including water transportation, trucking, warehousing and other transport services, while the remainder were in administrative and support services. The cruise lines directly account for about half of the employment and wage impacts in this sector. The remaining half of the impacts occur

principally with port authorities with additional impacts affecting ship agents; stevedoring and warehousing firms and other water transportation services, such as pilots and tugboats; and administrative and support services to these services.

Transportation Services in the United States

With \$3.2 billion in direct expenditures, the transportation services sector was the second largest component of the core cruise travel sector and accounted for 25 percent of cruise industry spending within the core cruise travel sector. Transportation services primarily include travel agents and tour operators.

The \$3.2 billion in spending by the cruise lines and their passengers and crew for transportation services was a 4.2 percent decrease from 2018. Overall, BREA estimated that the cruise industry spending for these transportation services was responsible for the generation of 29,000 jobs in this sector paying nearly \$1.4 billion in wages.

Air Transportation Services in the United States

Air transportation accounts for another 20 percent of cruise industry spending in the core cruise travel sector. About 40% of the passengers arrived at their port city by air travel. Those cruise passengers who flew to their port city spent an estimated \$2.5 billion on air transportation, an increase of 6.4 percent from 2018. These expenditures produced 12,400 jobs in the United States an increase of 3.8 percent from 2018, while the wage income impact increased by 5.9 percent to \$650 million.

Passenger and Crew Spending in the United States

The final component of the core cruise travel sector is the spending of cruise passengers and crew for a variety of retail, dining, local transit and lodging services.⁶ First, as previously discussed, nearly 13.8 million passengers embarked on cruises at U.S. ports. Second, the industry generated nearly 6.5 million transit visits at U.S. ports-of call. Approximately 80 percent of all port of call visits were in Alaska and Florida. Finally, crew onboard cruise ships visit both ports-of-embarkation and transit ports-of-call. Passenger and crew combined spending for non-transportation services of the core cruise travel sector totaled an estimated \$2.6 billion in the United States during 2019, an increase of 9.6 percent from 2018. These expenditures accounted for 21 percent of cruise industry spending within the core cruise travel sector. This spending was responsible for the generation of 31,300 jobs in the U.S., an

⁶ Passenger and crew expenditures for sightseeing and shore excursions are included in the Transportation Services category of the core cruise travel sector.

increase of 11 percent from 2018. The associated annual wages are \$819 million, increased by 9.8 percent from 2018.

On an industry basis, the employment and wage impacts were concentrated in three key industries: the accommodation, food and beverage service, and retail. The accommodation sector accounted for 65 percent of passenger and crew non-transportation expenditures, while the food and beverage service sector accounted for about 24 percent and the retail trade industry accounted for the remaining 11 percent of the economic impacts generated by passenger and crew expenditures.

Adding in the cost of shore tours and local transportation, part of which was included in Transportation Services, passengers and crew spent \$3.2 billion in port cities throughout the United States. This was a 13 percent increase from 2018. As shown in **Table 6** and **Figure 5**, embarkation passengers accounted for 64 percent of the total spending with \$2.1 billion in 2019. Based upon the passenger survey data referenced previously, about 43 percent of embarking passengers stayed one or more nights in a port city and spent a total of \$1.8 billion during their visits. On average, these overnight cruise visitors spent \$304 per visit. The average length of stay of these passengers was approximately 1.1 nights.

Table 6 – Onshore Passenger and Crew Expenditures in the United States⁷ – 2019

	Onshore Visits	Total Spending	Avg Spend Pax/Crew
Embarkation Passenger	13,794,000	\$ 2,083	\$ 151.08
Overnight Stays	5,889,000	\$ 1,793	\$ 304.38
Day of Cruise Arrivals	7,905,000	\$ 291	\$ 36.87
Port-of-Call Passengers	6,454,000	\$ 806	\$ 124.81
Crew Onshore Visits	3,373,000	\$ 344	\$ 102.05
Total U.S.-based Spending	23,621,000	\$ 3,233	\$ 139.87

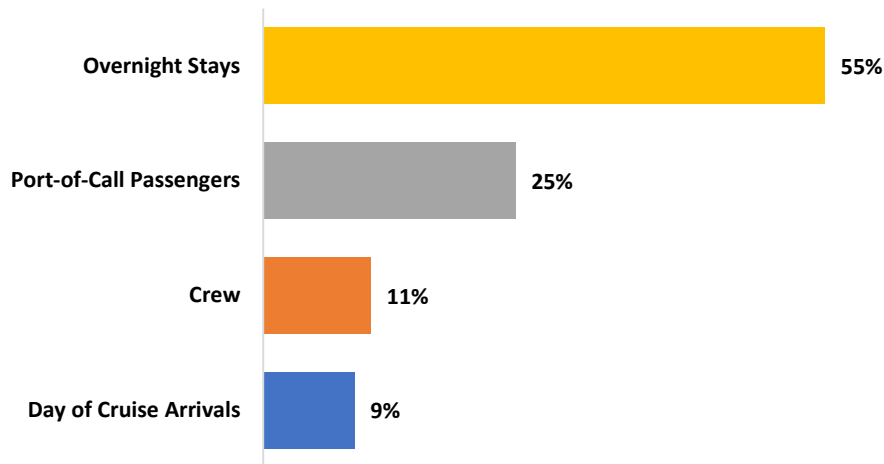
Source: Business Research and Economic Advisors

Embarking passengers who arrived at the port city on the day of their cruise spent an average of \$37. Most of these expenditures were for local transit, parking and limited food and retail purchases. In total, we estimated that these day of arrival cruise passengers spent \$291 million during 2019.

In addition, there was approximately \$1.9 billion in passenger paid airfare in 2019, bringing the total passenger and crew spending to \$5.1 billion.

⁷ Passenger & Crew spending only included onshore purchases, such as accommodations, food & beverage, sightseeing tours and other retail.

Figure 5 – Distribution of Onshore Spending by Passenger and Crew in the U.S.– 2019
Total = \$3.2 Billion



Source: Business Research and Economic Advisors

BREA also estimated that the cruise industry generated 6.5 million port-of-call onshore visits.⁸ Approximately 62 percent of these visits were made to ports in Alaska, unchanged from 2018. Cruise ships also make calls at other ports throughout the United States including Key West, Port Canaveral, Hawaii, and many of the East and West Coast ports. Survey data of transit port-of-call passengers across the U.S. indicated that nationally port-of-call passenger spent an average of nearly \$125 per visit. Consequently, we have estimated that these 6.5 million passengers spent nearly \$806 million in the United States during 2019, or 25 percent of the total passenger and crew spending. The average passenger expenditure per port-of-call visit decreased slightly from 2018.

Finally, crew onboard the cruise ships will disembark at both ports-of-embarkation and transit ports-of-call. We estimated that nearly 8.9 million crew arrivals were made at U.S. port cities in 2019. With an estimated 3.4 million crew onshore visits, and an average crew expenditure of \$102 per onshore visit, crew spent an estimated \$344 million in the United States during 2019. This equates to 11 percent of the total expenditures of passengers and crew.

Another way to view passenger and crew spending is in terms of the onshore spending generated by a typical or average cruise ship call. As shown in **Table 7**, we have estimated that a 3,500-passenger ship generated an average of approximately \$580,000 in passenger and crew onshore spending per call in the home port city during 2019. A similar ship making

⁸ Not all passengers get off at each port, thus, the number of passenger onshore visits is lower than the number of passenger arrivals. For the 2019 study BREA generally estimated that 89 percent of arriving passengers disembarked and visited the port city.

transit port-of-call visits would generate an average of approximately \$446,000 in passenger and crew onshore spending per U.S. port call.

Table 7 – Estimated Onshore Spending Generated by a 3,500-Passenger Cruise Ship – 2019

	Onshore Visits	Spending	Avg Spend Pax/ Crew
Homeport Cruise Visits	4,060	\$ 579,433	\$ 142.72
Passengers with Overnight Stays	1,470	\$ 447,433	\$ 304.38
Passengers Arriving on Day of Cruise	2,030	\$ 74,851	\$ 36.87
Crew Onshore Visits	560	\$ 57,148	\$ 102.05
Port-of-Call Cruise Visit	3,675	\$ 445,931	\$ 121.34
Passenger Onshore Visits	3,115	\$ 388,783	\$ 124.81
Crew Onshore Visits	560	\$ 57,148	\$ 102.05

Source: Business Research and Economic Advisors

Other Direct Impacts in the United States – Cruise Line Expenditures

During 2019, U.S. businesses outside the core cruise travel sector received \$12.5 billion in direct spending by the cruise lines. These expenditures generated an estimated 50,200 jobs in the nation paying wage income of nearly \$3.3 billion. Expenditures with suppliers increased by 6.5 percent from 2018. The employment impact among cruise industry suppliers increased by about 4.3 percent while the income impact rose by 8.4 percent. **Table 5** (shown earlier) shows the direct impacts of these expenditures by the cruise lines on major business sectors of the U.S. economy. As shown in **Figure 6** below, the top 2 sectors account for about 81 percent of the economic impacts within the Cruise Industry Suppliers:

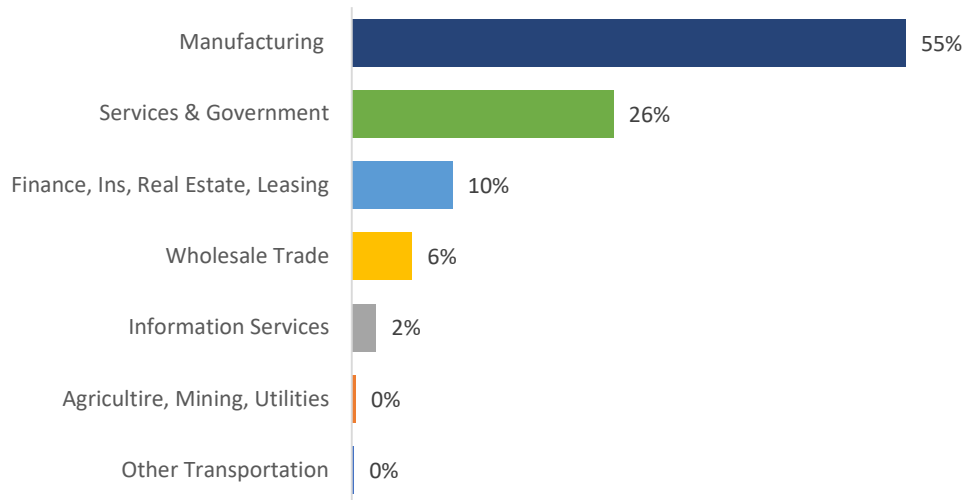
- Manufacturing sector (\$6.9 billion in direct expenditures, over 16,400 jobs, and nearly \$1.2 billion in wage income) comprised of a very broad range of business services, including ship maintenance and repair, food and beverages, industrial machinery, and apparel & textiles, to name a few. Collectively, the direct cruise industry expenditures within these subsectors increased by 18 percent from 2018, while the subsequent employment impact rose by 25 percent.
- Services and Government sector (\$3.2 billion in direct expenditures, over 26,300 jobs, and nearly \$1.5 billion in wage income). primarily includes professional services, legal, accounting, administration and waste management, etc. The cruise industry decreased its expenditures within this sector by 12 percent in 2019. The direct employment impact dropped by 6.0 percent while the wage impact decreased by 4.6 percent.
- Finance, Insurance, Real Estate and Leasing subsector (\$1.3 billion in direct expenditures, 3,200 jobs, \$293 million in wage income): includes banking and brokerage services; vessel, passenger travel and employee health insurance; real estate services and the leasing of

property and equipment. Spending with financial service providers rose by 4.8 percent from 2018. The employment impact increased by 6.0 percent from while the income impact increased by 2.3 percent from 2018.

- Wholesale Trade sector (\$786 million in direct expenditures, 3,500 jobs, and \$261 million in wage income): primarily includes the wholesale distribution and warehousing costs associated with the purchase and delivery of manufactured products consumed and/or used onboard the cruise ships. Expenditures among wholesalers increased by 12 percent from 2018. The employment impact rose by 9.4 percent, while the wage impact increased by 12 percent from 2018.
- Information Services sector (\$299 million in direct expenditures, 550 jobs, and \$53 million in wage income): subsectors include data communications, data processing, publishing services and web-based services, to name a few. Expenditures among this sector increased by 2.6 percent from 2018. The employment impact decreased by 3.7 percent, while the wage impact increased by 2.1 percent from 2018.

Figure 6 – Distribution of Direct Expenditures to Cruise Industry Suppliers – 2019

Total = \$12.5 Billion



Source: Business Research and Economic Advisors

Indirect and Induced Economic Impacts in the United States During 2019

The indirect economic benefits derived from the cruise industry result in part from the additional spending by the suppliers to the cruise industry. For example, food processors must purchase raw foodstuffs for processing; utility services, such as electricity and water, to run equipment and process raw materials; transportation services to deliver finished products to the cruise lines or wholesalers; and insurance for property and employees. The U.S. input/output table and multipliers were used to estimate the indirect impacts.⁹ The input/output table reflects the inter-industry links among industries in the U.S. economy. Use of the U.S. input/output table permits the estimation of the additional economic impacts that the direct spending by the cruise industry, its passengers and its suppliers has on all other industries in the U.S. economy.

In addition to the indirect impacts generated by the purchase of business goods and services by cruise industry suppliers, the employees of the cruise lines and their suppliers generate additional economic benefits through their purchases of consumer goods and services including such goods as autos, food, clothing, furniture, health care and so forth.

The economic impact analysis implied that the direct spending of the international cruise industry generated another 258,500 jobs in the United States through the indirect and induced spending by businesses and employees, an increase of 3.7 percent from 2018. In addition, these jobs generated \$15.7 billion in wage income for these workers, an increase of 5.6 percent from 2018. As shown in **Table 8**, the indirect/induced economic impacts touch virtually every industry in the nation.

⁹ Bureau of Economic Analysis, [Annual Input/Output Accounts for the U.S. Economy](#), 2018.

Table 8 – Indirect and Induced Economic Impacts of the Cruise Industry in the U.S. – 2019

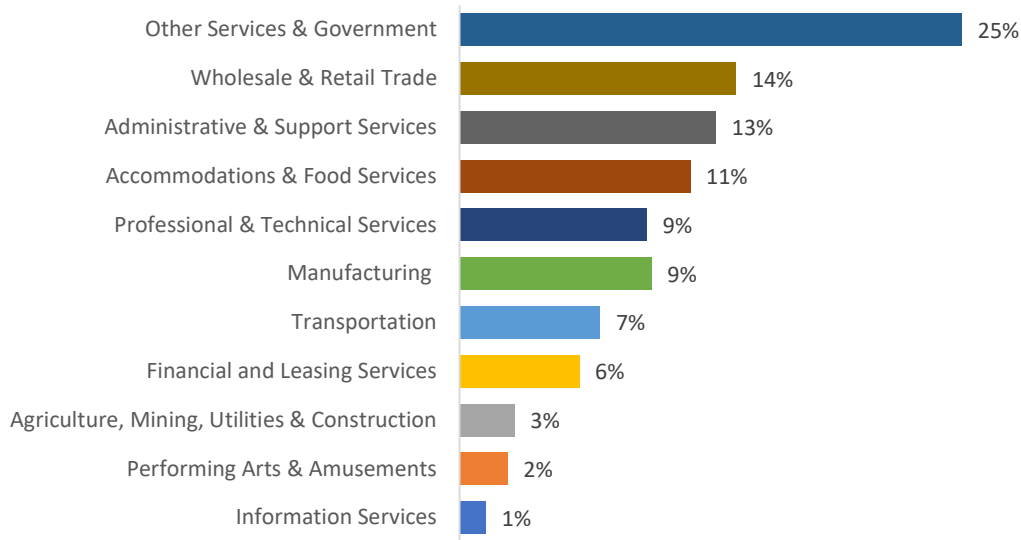
Sector	Cruise Industry Direct Spending \$ Millions	Indirect/ Induced Employment	Indirect/ Induced Wage Income \$ Millions
Agriculture, Mining, Utilities & Construction	\$ 48	7,006	\$ 611
Manufacturing	\$ 6,876	24,386	\$ 1,981
Food & Beverages	\$ 1,056	2,264	\$ 126
Apparel & Textiles	\$ 165	1,993	\$ 107
Paper & Printing	\$ 116	1,237	\$ 86
Chemicals & Plastics	\$ 343	2,529	\$ 233
Petroleum Refining	\$ 1,513	482	\$ 34
Fabricated Metal Products	\$ 539	4,126	\$ 307
Industrial Machinery	\$ 723	1,163	\$ 94
Transportation Equipment	\$,528	3,060	\$ 281
Computers & Electronic Equipment	\$ 387	3,323	\$ 421
Other Manufacturing	\$ 506	4,209	\$ 292
Wholesale & Retail Trade	\$ 1,160	35,102	\$ 1,870
Transportation	\$ 6,053	17,876	\$ 937
Information Services	\$ 299	3,349	\$ 353
Finance, Insurance, Real Estate & Leasing	\$ 1,251	15,233	\$ 1,523
Services & Government	\$ 9,450	155,554	\$ 8,378
Professional, Scientific & Technical Svcs.	\$ 1,995	23,795	\$ 2,273
Administrative & Waste Management Svcs.	\$ 3,382	32,550	\$ 1,202
Accommodations & Food Svcs.	\$ 2,501	29,309	\$ 635
Performing Arts & Amusements	\$ 237	6,144	\$ 220
Other Services & Government	\$ 1,334	63,756	\$ 4,048
Total - 2019	\$ 25,136	258,507	\$ 15,653
Total - 2018	\$ 23,955	249,385	\$ 14,828
Percentage Change from 2018	4.9%	3.7%	5.6%

Source: Business Research and Economic Advisors

The Services & Government sector was the most significantly impacted sector within the nation. This sector accounted for 60 percent of the indirect/induced employment impact and 54 percent of the wage impact nationally. The indirect/induced impacts of cruise industry spending generated nearly 155,600 jobs in the Services and Government sector paying \$8.4 billion in wage income. The indirect/induced employment impacts in this sector rose by 3.1 percent while the income increased by 3.9 percent from 2018.

Within the Professional, Scientific and Technical Services subsector, the indirect impacts added 23,800 jobs and \$2.3 billion in wage income. These impacts resulted from business demand for a variety of services, including legal and accounting services, consulting services, especially computer consulting, advertising and other business services.

Figure 7 – Distribution of Indirect/Induced Employment Impacts – 2019
Total = 258,500 Jobs



Source: Business Research and Economic Advisors

Another 32,550 jobs and \$1.2 billion in income were generated in the Administrative and Waste Management Services subsector. The respective percentage increases from 2018 for the employment and wage income impacts were 0.9 percent and 4.1 percent, respectively. This sector is comprised of establishments that provide routine support activities for the day-to-day operations of other businesses. These include such activities as temporary help services, document preparation services, telephone call and answering services, security services, travel agents and tour operators and sanitary services to name a few.

The Accommodations and Food Services subsector, which includes hotels and restaurants, benefited from the creation of an estimated 29,300 jobs and \$635 million in wage income. These impacts are primarily due to the travel and dining requirements of day-to-day business operations, as well as consumer vacation travel. The indirect employment impact rose by 16 percent from 2018 and the income impact increased by 15 percent.

An estimated 35,100 indirect jobs, 14 percent of the total indirect employment impacts, with an annual income of \$1.9 billion were generated in the Wholesale & Retail Trade sector because of cruise industry spending in 2019. Relative to 2018, the indirect employment impacts in this sector rose by 3.3 percent while the wage income impacts increased by 6.1 percent. The wholesale trade subsector accounted for approximately 31 percent of the indirect employment impacts and 55 percent of the wage income impacts in the Wholesale

& Retail Trade sector. The higher income share reflects the higher average wage in the wholesale trade industry.

The Transportation sector remained an important sector within the nation with 17,900 indirect jobs, 6.9 percent of the total indirect employment impacts, paying \$937 million in wages. This reflects the strong inter-industry linkages within the transportation sector, as well as, the reliance on a variety of transportation services to supply businesses with their inputs and to deliver consumer goods to retail outlets. The indirect employment impacts in this sector rose by 2.4 percent from 2018 while the income impacts increased by 1.8 percent.

Finally, the indirect/induced impacts of cruise industry spending generated 24,400 jobs within the Manufacturing sector during 2019, 9.4 percent of the total indirect employment. These jobs paid nearly \$2.0 billion in annual income, an increase of 23 percent from 2018. The majority of the employment impacts were spread among nine industries with the employment impacts ranging from 482 jobs in the petroleum refining industry to 4,100 jobs in the fabricated metals industry. Combined, the nine industries shown in Table 8 (above) accounted for 83 percent of the indirect employment impacts in the Manufacturing sector.

Total Economic Impacts in the United States During 2019

The international cruise industry is responsible for considerable economic activity across the United States. As noted previously, the industry directly spent \$25.1 billion in the United States in 2019. As shown in **Table 9**, this spending generated \$55.5 billion in total industry output among U.S. businesses during 2019, an increase of 5.3 percent from 2018. The \$55.5 billion in total output resulted in the employment of 436,600 workers, an increase of 3.5 percent from 2018, and \$24.4 billion in wages and salaries, a growth of 5.4 percent from 2018. These total impacts are the sum of the direct, indirect and induced impacts of the direct spending of the international cruise industry.

Table 9 – Total Economic Impacts of the Cruise Industry in the United States – 2019

Sector	Industry Output \$ Millions	Employment	Wage Income \$ Millions
Agriculture, Mining, Utilities & Construction	\$ 5,045	7,207	\$ 618
Manufacturing	\$ 13,201	40,802	\$ 3,170
Food & Beverages	\$ 901	4,525	\$ 228
Apparel & Textiles	\$ 1,270	2,923	\$ 151
Paper and Printing	\$ 346	1,779	\$ 116
Chemicals & Plastics	\$ 561	2,941	\$ 275
Petroleum Refining	\$ 1,016	687	\$ 61
Fabricated Metal Products	\$ 1,053	5,988	\$ 432
Industrial Machinery	\$ 1,026	3,205	\$ 242
Transportation Equipment	\$ 2,067	3,447	\$ 434
Computers & Electronic Equipment	\$ 3,685	4,589	\$ 574
Other Manufacturing	\$ 1,275	10,718	\$ 657
Wholesale & Retail Trade	\$ 3,425	38,604	\$ 2,131
Transportation	\$ 8,535	84,909	\$ 4,295
Information Services	\$ 1,015	3,901	\$ 406
Finance, Insurance, Real Estate & Leasing	\$ 4,803	18,430	\$ 1,816
Services & Government	\$ 19,436	242,756	\$ 11,962
Professional, Scientific & Technical Services	\$ 5,842	39,757	\$ 3,032
Administrative & Waste Management Services	\$ 4,686	65,523	\$ 2,106
Accommodations & Food Services	\$ 2,644	51,275	\$ 1,290
Performing Arts & Amusements	\$ 1,000	18,484	\$ 483
Other Services & Government	\$ 5,264	67,718	\$ 5,052
Total - 2019	\$ 55,460	436,611	\$ 24,399
Total - 2018	\$ 52,672	421,711	\$ 23,151
Percentage Change from 2018	5.3%	3.5%	5.4%

Source: Business Research and Economic Advisors

Since 2012, the total economic impact of the international cruise industry has increased significantly. Total annual output supported by the cruise industry has increased by 31 percent

over this time frame. As a result of the increased output, the cruise industry's total annual employment and wage impacts have increased over the same time frame by 23 percent and 40 percent respectively.

Virtually all sectors of the economy were affected by the international passenger cruise industry. The industries that were most significantly affected included:

- Air Transportation
- Travel Agents
- Advertising
- Food Processing
- Ship Maintenance and Repair
- Petroleum Refining
- Business Services
- Wholesale Trade

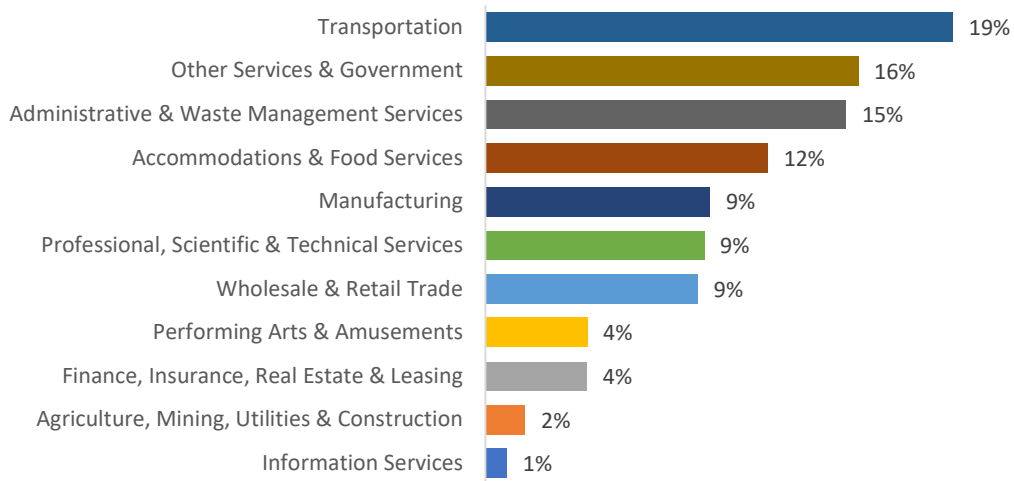
However, many other industries were affected in some form, including lodging, insurance, telecommunications, retail trade and many others.

As shown in **Table 9** (above) and **Figure 8** (below), the Transportation sector accounted for the most total jobs generated by the international cruise industry. Over 84,900 jobs were generated in this sector, accounting for 19 percent of the total employment impact. These jobs, in turn, generated \$4.3 billion in wages.

The Administrative & Waste Management Services and the Other Services & Government subsectors respectively accounted for 15 percent and 16 percent of all (direct, indirect and induced) jobs generated in the United States by the spending of the cruise industry and its passengers and crew. Combined, these two subsectors generated over 133,200 jobs and nearly \$7.2 billion in wages during 2019.

Approximately \$13.2 billion in output was generated in the Manufacturing sector. With 40,800 jobs created, the Manufacturing sector accounted for 9.3 percent of the total jobs, and 13 percent of the income (nearly \$3.2 billion) generated by cruise industry spending. Durable goods accounted for 69 percent of manufacturing while nondurable goods accounted for 31 percent.

Figure 8 – Distribution of Total Employment Impacts – 2019
Total = 436,611 Jobs



Source: Business Research and Economic Advisors

Finally, the Wholesale & Retail Trade sector accounted for 8.8 percent of the total employment impact of the cruise industry having generated just over 38,600 jobs and \$2.1 billion in income as a result of the expenditures of the international cruise industry.

Section II: The Contribution of the Cruise Industry to the U.S. Economy by State in 2019

The national economic contributions discussed in the previous section also had an effect on individual state economies. The direct economic contribution of the cruise industry and its passengers and crew was allocated to each state based on several criteria. First, vendor purchases by industry were allocated to each state based upon a sample of state- and industry-specific vendor purchases obtained from the cruise lines. Second, wages and salaries of shoreside employees of the cruise lines were allocated to each state based upon the location of administrative facilities as provided by the cruise lines. Third, national travel agent commissions were allocated to each state based upon the place of residence of cruise passengers. Fourth, air transportation spending was assigned to each state based upon a combination of the residence of passengers and the ports of embarkation of passengers. Fifth, cruise passenger and crew expenditures were allocated to states based upon embarkation and arrival data.

The total economic contribution in each state was estimated by using state- and industry-specific multipliers obtained from the Bureau of Economic Analysis. These multipliers reflect the industry and wage structure in each state. As a consequence, the direct and indirect economic contributions estimated for each state reflect the distribution of vendor purchases by the cruise industry by industry and state, the place of residence of cruise passengers, the regional distribution of cruise embarkations and port-of-call visits and the economic structure of each state.

As shown in **Table 10**, our analysis shows that the international cruise industry affects every state economy. **Table 10** shows the total employment and wages, which result in part, from the direct expenditures of the cruise lines for goods and services used to support their cruise operations. These range from the purchase of food and beverages, to ship maintenance and refurbishment, to engineering, insurance and management consulting services. Economic contributions are also generated by other components of what we have called the core cruise travel sector. These include the commissions received by travel agents from the cruise lines, airfares received by airlines from cruise passengers and fees received by port authorities and port service providers.

Table 10 – Direct Expenditures and Total Employment & Wage Impacts for All States – 2019

State	2019	2018	Direct Purchases (\$ Millions)	Share of U.S.	Total Emp	Share Of U.S.	Total Income	Share Of U.S.	Avg Wage
Florida	1	1	\$ 9,043	36.0%	158,992	36.4%	\$ 8,063	33.0%	\$ 50.7
California	2	2	\$ 2,596	10.3%	50,193	11.5%	\$ 3,318	13.6%	\$ 66.1
Texas	3	3	\$ 1,610	6.4%	26,872	6.2%	\$ 1,815	7.4%	\$ 67.6
New York	4	4	\$ 1,309	5.2%	17,366	4.0%	\$ 1,157	4.7%	\$ 66.6
Alaska	5	5	\$ 1,276	5.1%	23,008	5.3%	\$ 1,226	5.0%	\$ 53.3
Washington	6	6	\$ 1,079	4.3%	22,750	5.2%	\$ 1,345	5.5%	\$ 59.1
Georgia	7	7	\$ 772	3.1%	14,233	3.3%	\$ 799	3.3%	\$ 56.2
Illinois	8	8	\$ 619	2.5%	9,935	2.3%	\$ 646	2.6%	\$ 65.0
New Jersey	9	9	\$ 526	2.1%	9,609	2.2%	\$ 581	2.4%	\$ 60.5
Louisiana	10	10	\$ 491	2.0%	9,012	2.1%	\$ 397	1.6%	\$ 44.1
Hawaii	11	12	\$ 464	1.8%	7,059	1.6%	\$ 261	1.1%	\$ 37.0
Pennsylvania	12	11	\$ 463	1.8%	7,286	1.7%	\$ 449	1.8%	\$ 61.6
Colorado	13	13	\$ 415	1.6%	2,823	0.6%	\$ 180	0.7%	\$ 63.9
Massachusetts	14	14	\$ 388	1.5%	5,830	1.3%	\$ 427	1.7%	\$ 73.2
Indiana	15	15	\$ 346	1.4%	8,473	1.9%	\$ 449	1.8%	\$ 53.0
North Carolina	16	16	\$ 308	1.2%	4,650	1.1%	\$ 231	0.9%	\$ 49.8
Michigan	17	17	\$ 285	1.1%	3,906	0.9%	\$ 228	0.9%	\$ 58.4
Virginia	18	21	\$ 262	1.0%	3,812	0.9%	\$ 231	0.9%	\$ 60.7
Ohio	19	20	\$ 255	1.0%	4,840	1.1%	\$ 248	1.0%	\$ 51.3
Arizona	20	19	\$ 247	1.0%	4,188	1.0%	\$ 196	0.8%	\$ 46.7
Maryland	21	18	\$ 242	1.0%	3,890	0.9%	\$ 223	0.9%	\$ 57.4
Connecticut	22	22	\$ 237	0.9%	1,968	0.5%	\$ 175	0.7%	\$ 89.1
Oregon	23	23	\$ 196	0.8%	5,608	1.3%	\$ 287	1.2%	\$ 51.1
Alabama	24	24	\$ 195	0.8%	2,830	0.6%	\$ 138	0.6%	\$ 48.6
South Carolina	25	26	\$ 178	0.7%	3,474	0.8%	\$ 142	0.6%	\$ 40.9
Missouri	26	25	\$ 169	0.7%	3,812	0.9%	\$ 202	0.8%	\$ 52.9
Minnesota	27	27	\$ 133	0.5%	2,522	0.6%	\$ 154	0.6%	\$ 61.0
Tennessee	28	28	\$ 112	0.4%	2,038	0.5%	\$ 96	0.4%	\$ 46.9
Nevada	29	29	\$ 108	0.4%	1,616	0.4%	\$ 76	0.3%	\$ 46.7
Wisconsin	30	30	\$ 73	0.3%	1,260	0.3%	\$ 59	0.2%	\$ 46.7
Kentucky	31	32	\$ 70	0.3%	1,589	0.4%	\$ 72	0.3%	\$ 45.1
Maine	32	31	\$ 68	0.3%	1,021	0.2%	\$ 36	0.1%	\$ 35.3
Mississippi	33	37	\$ 64	0.3%	824	0.2%	\$ 32	0.1%	\$ 38.8
Kansas	34	33	\$ 63	0.3%	1,981	0.5%	\$ 98	0.4%	\$ 49.4
Utah	35	34	\$ 60	0.2%	1,426	0.3%	\$ 61	0.2%	\$ 42.5
Oklahoma	36	35	\$ 53	0.2%	1,083	0.2%	\$ 48	0.2%	\$ 43.9
Iowa	37	38	\$ 49	0.2%	453	0.1%	\$ 19	0.1%	\$ 42.1
Dist. of Col.	38	36	\$ 48	0.2%	297	0.1%	\$ 44	0.2%	\$148.4
Arkansas	39	39	\$ 38	0.1%	732	0.2%	\$ 28	0.1%	\$ 38.7
Delaware	40	41	\$ 36	0.1%	324	0.1%	\$ 20	0.1%	\$ 60.9
New Hampshire	41	40	\$ 35	0.1%	395	0.1%	\$ 23	0.1%	\$ 58.2
Nebraska	42	42	\$ 30	0.1%	574	0.1%	\$ 28	0.1%	\$ 49.0
Rhode Island	43	43	\$ 30	0.1%	446	0.1%	\$ 19	0.1%	\$ 43.6
New Mexico	44	44	\$ 20	0.1%	315	0.1%	\$ 16	0.1%	\$ 52.0
Idaho	45	45	\$ 19	0.1%	357	0.1%	\$ 15	0.1%	\$ 43.1
West Virginia	46	46	\$ 15	0.1%	320	0.1%	\$ 14	0.1%	\$ 43.1
Vermont	47	47	\$ 14	0.1%	100	0.0%	\$ 6	0.0%	\$ 59.6
North Dakota	48	48	\$ 10	0.0%	207	0.0%	\$ 7	0.0%	\$ 35.9
South Dakota	49	50	\$ 8	0.0%	118	0.0%	\$ 4	0.0%	\$ 36.8
Montana	50	49	\$ 8	0.0%	133	0.0%	\$ 6	0.0%	\$ 45.7
Wyoming	51	51	\$ 4	0.0%	61	0.0%	\$ 3	0.0%	\$ 52.5
U. S. Total			\$ 25,136		436,611		\$24,399		\$ 55.9

Source: Business Research and Economic Advisors

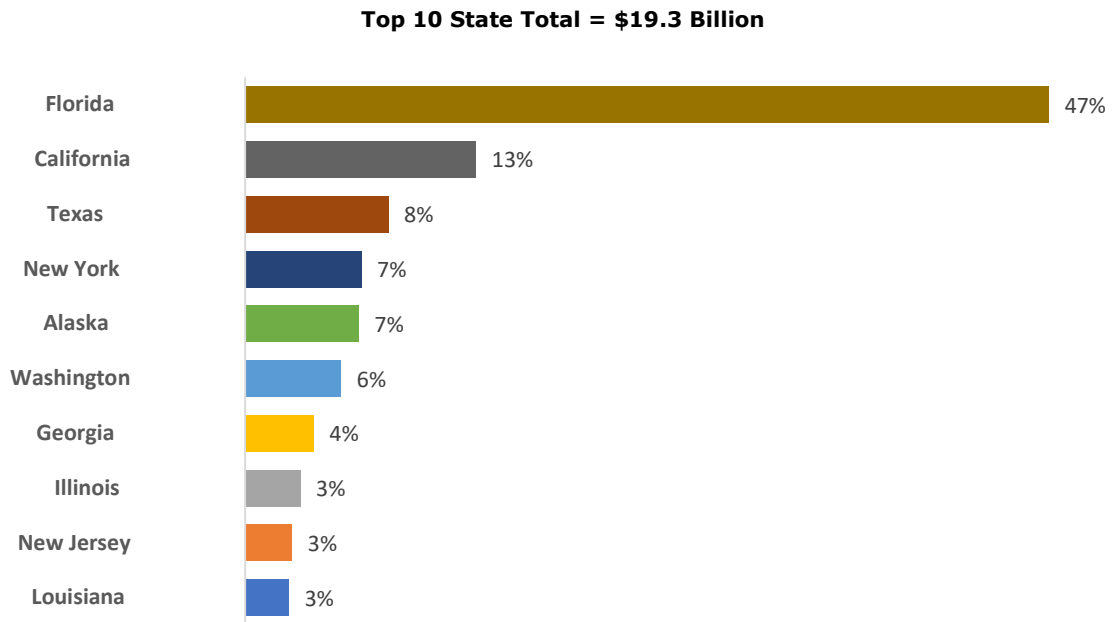
Economic Impacts in the Top 10 States

As shown in **Table 10**, all states had some direct expenditures generated by the international cruise industry in 2019. This ranged from approximately \$4 million in Wyoming to over \$9.0 billion in Florida.

The top 10 states accounted for 77 percent of the direct expenditures of the cruise industry with \$19.3 billion (See **Figure 9**). Of the top 10 states, eight (Florida, California, Texas, New York, Alaska, Washington, New Jersey and Louisiana) had significant cruise ports. Of these, Alaska was primarily a destination rather than a homeport state. The other two states, Georgia, and Illinois, had no cruise ports but were significant source markets for cruise passengers and provided vendor support for cruise and cruise tour operations. These 10 states also accounted for 78 percent of the total jobs generated by cruise tourism in the United States with nearly 342,000 jobs paying \$19.3 billion in wage income, 79 percent of the total national impact.

Of the remaining states, 15, received less than \$50 million in direct cruise industry expenditures. These were all largely source market states with smaller populations. Another 22 states received \$50 to \$350 million in direct expenditures. Several of these were states where smaller cruise port operations occurred (Virginia, South Carolina, Maine, Maryland and Alabama), while the rest contained a larger population from which passengers were sourced or provided goods and services to the cruise industry. Finally, there were 4 states that received between \$350 and \$450 million in direct cruise industry expenditures. Hawaii and Massachusetts have cruise port operations and/or a significant number of sourced passengers. Pennsylvania, and Colorado provide a larger population from which passengers are sourced as well as directly providing a variety of goods and services to the cruise industry, particularly in the manufacturing industry.

Figure 9 – Distribution of Direct Expenditures of the International Cruise Industry in the Top 10 States – 2019



Source: Business Research and Economic Advisors

Summaries of the Economic Impacts of the Top 10 States

Florida

As has been discussed previously in this report, Florida is the center for cruising not only from the United States, but worldwide. As shown in **Table 11**, 8.3 million passengers boarded their cruises from one of Florida's five cruise ports, Port of Miami, Port Everglades, Port Canaveral, Port of Tampa and Port of Jacksonville¹⁰, accounting for 60 percent of embarkations at all U.S. ports. While these ports primarily offer cruises to the Bahamas, the Caribbean and Central America, cruises that originate in Florida also travel to ports around the world.

Table 11– Summary of 2019 Cruise Industry Impacts – Florida

	Florida	Share of the U.S.
Passenger Embarkations	8,286,000	60.1%
Resident Cruise Passengers	2,417,000	17.0%
Total Passenger Visits & Crew Arrivals	13,590,000	46.7%
Total Passenger & Crew Onshore Visits	11,047,580	46.7%
Direct Expenditures (\$ Millions)	\$ 9,043	36.0%
Total Employment Impact	158,992	36.4%
Total Wage Impact (\$ Millions)	\$ 8,063	33.0%

Source: Cruise Lines International Association and Business Research and Economic Advisors

Florida also led the nation in U.S.-sourced cruise passengers with 2.4 million passengers, 17 percent of all U.S.-sourced cruise passengers. With nearly three and a third times as many embarkations as resident passengers, the cruise industry in Florida is the largest net importer of cruise passengers in the United States.

Relative to 2018, Florida experienced an increase of 10 percent in passenger embarkations, and saw a 6.5 percent increase in sourced passengers.

Port-of-call passenger onshore visits in Florida totaled just over 1.2 million. Key West is a significant destination for many cruises with Caribbean itineraries. It accounts for about 80 percent of the total port of call visits across all Florida ports.

¹⁰ Key West is a port-of-call for Caribbean cruises and thus does not generate passenger embarkations. However, spending from port-of-call passenger and crew in Key West and other ports are included in the state visit and spending estimates.

Including homeport and transit calls, cruising at Florida ports generated an estimated 11.0 million passenger and crew onshore visits, accounting for 47 percent of all passenger and crew onshore visits in the United States. These visits produced an estimated \$1.4 billion in passenger and crew onshore spending, or nearly \$124 per passenger and crew onshore visit. As in 2018, Florida is the only state to generate over \$1 billion in annual passenger and crew expenditures, something no other state has yet achieved. Total passenger and crew spending in Florida increased by 12 percent from 2018 as a result of the increase in passenger onshore visits and crew arrivals.

Florida is not only the center for cruise originations, it is the center of just about all aspects of the cruise industry. Carnival Corporation & plc., Royal Caribbean Cruises, Ltd. and Norwegian Cruise Line have their headquarters in Florida as do other cruise lines. Accordingly, Royal Caribbean recently opened a new terminal in Port Miami and broke ground on an expanded corporate headquarters in mid-2019, and Carnival Cruise Lines has begun the construction of a new terminal at Port Canaveral, with a scheduled 2020 completion date. Overall, operations in 2019 employed approximately 60 percent of the total employment of all cruise lines throughout the United States.

As a result of the activity of the cruise industry, Florida businesses received just over \$9.0 billion, or 36 percent of the direct expenditures generated by the cruise industry in the United States. Due to the absolute scale of the industry, direct expenditures in Florida impacted just about all segments of the economy, including recreation and amusement establishments, wholesalers of products purchased by cruise lines, manufacturers of communications and navigation equipment, producers of machinery and equipment such as engine parts, boilers, laundry equipment and computers, manufacturers of fabricated metal products such as locks and security equipment and business service providers such as interior designers and computer services consultants. Tourism-related businesses in addition to the cruise lines, such as travel agencies, airlines, hotels, restaurants and providers of ground transportation were certainly the main beneficiaries of the cruise industry. These tourism-related industries received almost \$4 billion, or 44 percent of the industry's direct expenditures in Florida. Another 24 percent of direct spending went to the manufacturing industry with \$2.14 billion in direct expenditures. The three largest sectors affected within this industry were the food and beverage manufacturers, petroleum manufacturers and chemical manufacturers that make soap, cleaning and toiletry products.

Finally, these direct expenditures generated total economic impacts of almost 159,000 jobs and \$8.1 billion in income throughout the Florida during 2019. Florida's total employment impact increased by 2.8 percent while the total wage impact rose by 4.9 percent. These

impacts accounted for 36 percent of the national employment impact and 33 percent of the national wage impact.

California

With respect to the cruise industry, California is very similar to Florida only on a smaller scale. The state has four major cruise ports in Los Angeles, Long Beach, San Diego and San Francisco that combined generated nearly 1.3 million passenger embarkations during 2019, 9.1 percent of total U.S. embarkations (see **Table 12**). Cruise itineraries primarily include ports along the Pacific coast of Mexico, but also include cruises through the Panama Canal, to Hawaii and Alaska.

Table 12 – Summary of 2019 Cruise Industry Impacts – California

California		Share of the U.S.
Passenger Embarkations	1,253,000	9.1%
Resident Cruise Passengers	1,480,000	10.4%
Total Passenger Visits & Crew Arrivals	2,320,000	8.0%
Total Passenger & Crew Onshore Visits	1,882,000	8.0%
Direct Expenditures (\$ Millions)	\$ 2,596	10.3%
Total Employment Impact	50,193	11.5%
Total Wage Impact (\$ Millions)	\$ 3,318	13.6%

Source: Cruise Lines International Association and Business Research and Economic Advisors

Collectively, the California embarkation ports experienced an increase in embarkations from 2018 to 2019 of 12 percent.

Embarkations in San Francisco reached a peak of 112,000 in 2016 before experiencing a decrease to a total of 101,000 in 2019. Despite this decrease, and the low absolute number of annual embarkations compared to other ports in the state, San Francisco embarkations have grown 63 percent from 2012, the most in the state. San Diego reversed its downward trend in annual embarks over several periods in 2016 with a 12% increase during the year. San Diego nearly doubled its embarks in 2018 and added another 36 percent in 2019 reaching 145,000 embarks, its highest mark since 2010. Los Angeles and Long Beach have consistently been the busier ports in California. This trend continues in 2019 with Long Beach reaching a new high of nearly 696,000 embarks, and Los Angeles experiencing 311,000 embarks.

The 1.5 million cruise passengers sourced from California accounted for 10 percent of U.S.-sourced passengers during 2019, an increase of 4.3 percent from 2018. The larger number of resident passengers than passenger embarkations makes California a net exporter of cruise passengers.

Including homeport and transit calls, cruising at California ports generated an estimated 1.9 million passenger and crew onshore visits, accounting for 8.0 percent of all passenger and crew onshore visits in the United States. These visits produced an estimated \$161 million in passenger and crew onshore spending, or about \$86 per passenger and crew onshore visit. Total estimated spending by passengers and crew increased by 6.9 percent from 2018 as a result of the 7.1 percent increase in passenger onshore visits and crew arrivals.

Again, similar to Florida, California is the home of headquarters and support facilities for several cruise lines including Princess and Crystal Cruises. Overall, California employed about 6 percent of all cruise line employees throughout the United States.

Total direct cruise industry expenditures in California were approximately \$2.6 billion, or 10 percent of the direct expenditures generated by the cruise industry in the United States. This figure is the result of increased spending with businesses that support the industry beyond just cruises originating in California. These include entertainment, food processing and legal and professional services to name a few. Tourism-related businesses, such as travel agencies, airlines, hotels, etc., received \$923 million, or 36 percent of the industry's direct expenditures in California. Another \$551 million, or 21 percent of the total, was spent with businesses in three additional business segments, food processors and petroleum refiners within the manufacturing sector, and advertising agencies in the nonmanufacturing sector. Direct expenditures in California also impacted many other industries throughout the state including business service providers such as computer services, software developers, legal service providers, apparel manufacturing and the entertainment and amusement industry, including artwork and producers of musical and theatrical shows.

Finally, these direct expenditures generated total economic impacts of 50,200 jobs and \$3.3 billion in income throughout the California economy during 2019. These impacts accounted for 12 percent of national employment impact and 14 percent of the national wage impact.

Texas

During 2019, Galveston, Texas' major cruise port, had nearly 1.1 million embarkations, which accounts for 7.9 percent of all U.S. cruise embarkations. Galveston has seen a 14 percent increase in passenger embarkations since 2018. Cruise passengers sourced from Texas accounted for 9.6 percent of all U.S.-sourced passengers and totaled 1.4 million during 2019. The larger number of sourced passengers than passenger embarkations makes Texas a net exporter of cruise passengers.

Table 13 – Summary of 2019 Cruise Industry Impacts – Texas

	Texas	Share of the U.S.
Passenger Embarkations	1,092,000	7.9%
Resident Cruise Passengers	1,364,000	9.6%
Total Passenger Visits & Crew Arrivals	1,556,000	5.3%
Total Passenger & Crew Onshore Visits	1,268,000	5.3%
Direct Expenditures (\$ Millions)	\$1,610	6.4%
Total Employment Impact	26,872	6.2%
Total Wage Impact (\$ Millions)	\$1,815	7.4%

Source: Cruise Lines International Association and Business Research and Economic Advisors

Combining passenger onshore visits and crew arrivals, ships making calls in Texas generated nearly 1.3 million passenger and crew onshore visits, accounting for 5.3 percent of all passenger and crew onshore visits in the United States. The visits produced an estimated \$125 million in passenger and crew onshore spending, or approximately \$988 per passenger and crew onshore visit. Total passenger and crew spending in 2019 increased by 9 percent from 2018, due in part to the nearly 11 percent increase in visits.

As a result of the increase in cruise operations in Galveston, cruise industry direct expenditures increased by 6.5 percent in 2019 to \$1.6 billion, representing 6.4 percent of the direct expenditures generated by the cruise industry in the United States. Tourism-related businesses, such as travel agencies, airlines, hotels, etc., received approximately \$816 million, 51 percent of the industry's direct expenditures in Texas. Another \$452 million, 28 percent of direct expenditures in the state, was spent with businesses in three additional business segments, petroleum refiners in the manufacturing sector and wholesale trade and advertising agencies in the nonmanufacturing sector. The remaining direct expenditures in Texas also impacted many other industries throughout the state including food processors, machinery and computer equipment manufacturers, apparel manufacturers, software publishers, companies that manufacture and distribute communication and navigation equipment,

insurance carriers and a variety of professional services like legal, architectural and engineering services.

Finally, these direct expenditures generated total economic impacts of nearly 26,900 jobs and \$1.8 billion in income throughout the Texas economy during 2019. These impacts accounted for 6.2 percent of national employment impact and 7.4 percent of the national wage impact.

New York

New York is primarily a place of embarkation for cruises to Canada, Bermuda, the Bahamas and the Caribbean. While the cruises to Canada and Bermuda are seasonal (Spring through Fall months), cruises to the Bahamas and the Caribbean are offered on a year-round basis. The City of New York saw 550,000 passenger embarkations during 2019, 4.0 percent of total U.S. embarkations. The Manhattan Cruise Terminal handled approximately 84 percent of the passengers while the Brooklyn Cruise Terminal, processed the remaining 16 percent.

Table 14 – Summary of 2019 Cruise Industry Impacts – New York

New York		Share of the U.S.
Passenger Embarkations	550,000	4.0%
Resident Cruise Passengers	786,000	5.5%
Total Passenger Visits & Crew Arrivals	843,000	2.9%
Total Passenger & Crew Onshore Visits	719,000	2.9%
Direct Expenditures (\$ Millions)	\$ 1,309	5.2%
Total Employment Impact	17,366	4.0%
Total Wage Impact (\$ Millions)	\$ 1,157	4.7%

Source: Cruise Lines International Association and Business Research and Economic Advisors

Cruise passengers sourced from New York accounted for 5.5 percent of U.S.-sourced passengers and totaled 786,000 during 2019. As a result, New York was a net exporter of cruise passengers.

Relative to 2018, New York experienced a slight decrease in passenger embarkations. As a result, New York's share of passenger embarkations slipped from 4.4 percent in 2018 to 4.0 percent in 2019.

Including homeport and transit calls, cruising at New York cruise terminals generated an estimated 719,000 passenger and crew onshore visits, accounting for 2.9 percent of all passenger and crew onshore visits in the United States. These visits produced an estimated \$169 million in passenger and crew onshore spending, or \$234 per passenger and onshore visit. Passenger and crew spending decreased by 3.4 percent from 2018.

Cruise industry direct expenditures in New York totaled \$1.3 billion, or 5.2 percent of the direct expenditures generated by the cruise industry in the United States. Direct cruise industry expenditures in the state increased by 1.1 percent from 2018.

Tourism-related businesses, such as travel agencies, airlines, hotels, etc., received approximately \$507 million, 39 percent of the industry's direct expenditures in New York. Another \$527 million, also 40 percent of the direct expenditures, was spent with businesses in four additional business segments, petroleum refiners and distributors within the manufacturing sector, wholesale trade, advertising agencies and financial services, including banking, insurance and securities companies in the nonmanufacturing sector. The remaining direct expenditures in New York also impacted many other industries throughout the state including law firms, business service companies such as computer services, software consulting and marketing, manufacturers of fabricated metal products such as locks and security equipment and performing arts and amusement establishments.

Finally, these direct expenditures generated total employment impacts of about 17,400 jobs paying nearly \$1.2 billion in income throughout the New York economy during 2019. These impacts accounted for 4.0 percent of national employment impact and 4.7 percent of the national wage impact.

Alaska

Alaska is the premier cruise destination market in the United States. During 2019, Alaska ports received nearly 4.0 million port-of-call cruise passenger onshore visits, approximately 62 percent of all port-of-call cruise passenger onshore visits at U.S. ports. The state does have homeporting operations as well, and generated 221,000 embarkations on turnaround cruises between Alaska and Vancouver, Canada. The three busiest ports - consisting of Juneau, Ketchikan and Skagway - accounted for about 75 percent of all passenger onshore visits to Alaska. Juneau accounted for 29 percent with just over 1.1 million visits, Ketchikan accounted for 27 percent with just under 1.1 million visits and Skagway accounted for 24 percent with 960,000 visits. The remaining 20 percent were distributed among seven additional locations and accounted for approximately 810,000 visits. The cruise lines maintain significant tour operations in the state and employed an annual average of approximately 2,200 full- and part-time employees during the year.

Table 15 – Summary of 2019 Cruise Industry Impacts – Alaska

	Alaska	Share of the U.S.
Passenger Embarkations	221,000	1.6%
Resident Cruise Passengers	16,000	0.1%
Total Passenger Visits & Crew Arrivals	6,115,000	21.0%
Total Passenger & Crew Onshore Visits	4,928,000	21.0%
Direct Expenditures (\$ Millions)	\$ 1,276	5.1%
Total Employment Impact	23,008	5.3%
Total Wage Impact (\$ Millions)	\$ 1,226	5.0%

Source: Cruise Lines International Association and Business Research and Economic Advisors

Alaska is one of the least populous states in the nation and thus resident cruise passengers in the state totaled 16,000 and accounted for 0.1 percent of U.S.-sourced passengers during 2019. Thus, Alaska was a net importer of cruise passengers.

Relative to 2018, Alaska experienced a 12 percent increase in passenger embarkations and a 8.3 percent increase in total cruise passenger visits and crew arrivals. Including homeport and transit calls, cruising at Alaska ports generated 4.9 million passenger and crew onshore visits,¹¹ accounting for 21 percent of all passenger and crew onshore visits in the U.S. These onshore visits produced an estimated \$652 million in passenger and crew onshore spending, a 5.3

¹¹ Since individual passengers will make several port-of-call visits on any given itinerary, passenger visits are approximately three times greater than the number of passengers taking cruises to Alaska.

percent increase over 2018 and accounting for over \$132 per passenger and crew onshore visit.

Alaska ranked 5th in cruise industry direct expenditures with \$1.3 billion, or 5.1 percent of the direct expenditures generated by the cruise industry in the United States. Tourism-related businesses, such as tour operators, airlines, hotels, etc., received approximately \$807 million, about 63 percent of the industry's direct expenditures in Alaska. Another \$105 million was spent with businesses in four additional business segments, food processors and petroleum refiners and distributors within the manufacturing sector; and employment agencies and wholesale trade in the nonmanufacturing sector.

Finally, these direct expenditures generated total economic impacts of 23,000 jobs and \$1.2 billion in income throughout the Alaska economy during 2019. These impacts accounted for 5.3 percent of national employment impact and 5.0 percent of the national wage impact.

Washington

Washington has one major cruise port, Port of Seattle, which had 549,000 passenger embarkations during 2019, up 8.6 percent. Holland America Group has its headquarters in Washington. Many Seattle cruises are destined for the Alaska cruise market and also included at least one visit to a Canadian port. Washington's share of the total embarkations at U.S. ports was 4.3 percent in 2019.

Table 16 – Summary of 2019 Cruise Industry Impacts – Washington

Washington		Share of the U.S.
Passenger Embarkations	596,000	4.3%
Resident Cruise Passengers	327,000	2.3%
Total Passenger Visits & Crew Arrivals	876,000	3.0%
Total Passenger & Crew Onshore Visits	713,000	3.0%
Direct Expenditures (\$ Millions)	\$ 1,079	4.3%
Total Employment Impact	22,750	5.2%
Total Wage Impact (\$ Millions)	\$ 1,345	5.5%

Source: Cruise Lines International Association and Business Research and Economic Advisors

Cruise passengers sourced from Washington totaled 327,000 during 2019, 2.3 percent of U.S.-sourced passengers and a 8.2 percent increase from 2018 – making Washington a net importer of cruise passengers.

Combining passenger onshore visits and crew arrivals, cruising from the Port of Seattle generated an estimated 713,000 passenger and crew onshore visits, accounting for 3.0 percent of all passenger and crew onshore visits in the United States. These visits produced an estimated \$228 million in passenger and crew onshore spending, or \$321 per passenger and crew onshore visit.

As a result of the increase in passenger visits and crew arrivals in Seattle, direct cruise industry expenditures in Washington increased by 7.3 percent to \$1.1 billion, or 4.3 percent of the direct expenditures generated by the cruise industry in the United States. Tourism-related businesses, such as travel agencies, airlines, hotels, etc., received more than \$274 million, or 33 percent of the industry's direct expenditures in the state. Another \$268 million, or 32 percent was spent with businesses in six additional business segments, food processors, petroleum refiners and distributors, and ship repair companies within the manufacturing sector; and advertising agencies and technical and management consulting firms in the nonmanufacturing sector. Direct expenditures in Washington also impacted many other

industries throughout the state including law firms, insurance carriers, business service providers such as computer services, software consulting and marketing, and other financial service companies.

Finally, these direct expenditures generated total economic impacts of 22,750 jobs and \$1.3 billion in income throughout the Washington economy during 2019. Employment and wage impacts accounted for 5.2 and 5.5 percent of the corresponding national impacts.

Georgia

Georgia is a major source market for cruise passengers making it a net exporter of cruise passengers. Although it has no direct cruise operations, it also supports the industry with a wide range of goods and services. Cruise passengers sourced from Georgia totaled 626,000 during 2019, 4.4 percent of U.S.-sourced passengers – up 9.0 percent from 2018.

Table 17 – Summary of 2019 Cruise Industry Impacts – Georgia

Georgia		Share of the U.S.
Passenger Embarkations	N.A.	N.A.
Resident Cruise Passengers	626,000	4.4%
Direct Expenditures (\$ Millions)	\$ 772	3.1%
Total Employment Impact	14,233	3.3%
Total Wage Impact (\$ Millions)	\$ 799	3.3%

Source: Cruise Lines International Association and Business Research and Economic Advisors

Cruise industry expenditures in Georgia grew by 2.7 percent in 2019 to \$772 million, or 3.1 percent of the direct expenditures generated by the cruise industry in the United States. Since Georgia is a source market for cruise passengers, tourism-related businesses, such as travel agencies, airlines, hotels, etc., accounted for 39 percent of the industry’s direct expenditures in the state, or \$300 million. Another \$292 million or 39 percent was spent with businesses in the top six support industries, durable goods within the manufacturing sector such as computer and electronic equipment manufacturers and food processors and chemical manufacturers within the nondurable manufacturing sector; and the wholesale trade, advertising agencies and insurance companies in the nonmanufacturing sector. Direct expenditures in Georgia also impacted many other industries throughout the state including telecom companies, other financial services, software publishers and textile and apparel manufacturers.

Finally, these direct expenditures generated total economic impacts of 14,200 jobs and \$799 million in income throughout the Georgia economy during 2019. Georgia’s total employment impact increased by 3.1 percent from 2018 as a result of the increase in direct spending while the total wage impact grew by 5.0 percent. These impacts accounted for approximately 3.3 percent of national employment and wage impacts.

Illinois

Similar to Georgia, Illinois is a major source market for cruise passengers making it a net exporter of cruise passengers. It has no direct cruise operations, but it supports the industry with a wide range of goods and services. Cruise passengers sourced from Illinois totaled 351,000 during 2019, accounting for 2.5 percent of U.S.-sourced passengers.

Table 18 – Summary of 2019 Cruise Industry Impacts – Illinois

Illinois		Share of the U.S.
Passenger Embarkations	N.A.	N.A.
Resident Cruise Passengers	351,000	2.5%
Direct Expenditures (\$ Millions)	\$ 619	2.5%
Total Employment Impact	9,935	2.3%
Total Wage Impact (\$ Millions)	\$ 646	2.6%

Source: Cruise Lines International Association and Business Research and Economic Advisors

Cruise industry expenditures in Illinois increased to \$619 million, or 2.5 percent of the direct expenditures generated by the cruise industry in the United States in 2019. Since Illinois is a source market for cruise passengers, tourism-related businesses, such as travel agencies, airlines, hotels, etc., accounted for 21 percent of the industry's direct expenditures in the state, or \$132 million. Illinois makes a notable contribution to the cruise industry in the manufacturing sector. Approximately \$169 million, or 27 percent was spent with businesses in four manufacturing industries, food and beverage processors, industrial machinery, petroleum and coal product firms, and electrical equipment manufacturers. Another \$158 million, or 26 percent of the total in the state, was spent with three non-manufacturing firms, wholesale trade, insurance carriers, and advertising agencies. Direct expenditures in Illinois also impacted many other industries throughout the state including management and technical consultants, video and music production companies, paint and chemical manufacturers, business service providers such as computer services, software consulting and marketing.

Finally, these direct expenditures generated total economic impacts of 9,900 jobs and \$646 million in income throughout the Illinois economy during 2019. As a result of the increases in direct cruise expenditures in the state, Illinois' total employment impact increased by 13 percent from 2018 while the wage impact rose by 16 percent. These impacts accounted for 2.3 percent of national employment impact and 2.6 percent of the national wage impact.

New Jersey

New Jersey is primarily a place of embarkation for cruises to Canada, Bermuda, the Bahamas and the Caribbean. While the cruises to Canada and Bermuda are seasonal (spring through fall months), cruises to the Bahamas and the Caribbean are offered on a year-round basis. Cape Liberty, New Jersey's cruise port, saw an estimated 348,000 passenger embarkations during 2019, 2.5 percent of total U.S. Cape Liberty homeports ships from Royal Caribbean, Celebrity, TUI, Azamara and Silversea.

Table 19 – Summary of 2019 Cruise Industry Impacts – New Jersey

New Jersey		Share of the U.S.
Passenger Embarkations	348,000	2.5%
Resident Cruise Passengers	414,000	2.9%
Total Passenger Visits & Crew Arrivals	533,000	1.8%
Total Passenger & Crew Onshore Visits	434,000	1.8%
Direct Expenditures (\$ Millions)	\$ 526	2.1%
Total Employment Impact	9,609	2.2%
Total Wage Impact (\$ Millions)	\$ 581	2.4%

Source: Cruise Lines International Association and Business Research and Economic Advisors

Cruise passengers from New Jersey accounted for 2.9 percent of U.S.-sourced passengers and totaled 414,000 during 2019. Thus, New Jersey was a net exporter of cruise passengers. Relative to 2018, New Jersey experienced a 4.8 percent increase in the number of resident cruise passengers.

Cape Liberty generated an estimated 434,000 passenger and crew onshore visits, accounting for 1.8 percent of all passenger and crew onshore visits in the United States. These visits produced an estimated \$25.1 million in passenger and crew onshore spending in New Jersey, or about \$58 onshore visit.

Direct cruise industry expenditures were \$526 million, or 2.1 percent of the direct expenditures generated by the cruise industry in the United States. Tourism-related businesses, such as travel agencies, airlines, hotels, etc., received approximately \$302 million, 58 percent of the industry's direct expenditures in New Jersey. Another \$127 million, 24 percent of the direct expenditures, was spent with businesses in four additional business segments, petroleum refiners and distributors within the manufacturing sector; and advertising agencies, insurance companies and consulting firms in the nonmanufacturing sector. The remaining expenditures in New Jersey also impacted many other industries

throughout the state including law firms, business service companies such as computer services, software consulting and marketing and manufacturers of chemical products.

Finally, these direct expenditures generated total economic impacts of 9,600 jobs and \$581 million in income throughout the New Jersey economy during 2019. These impacts accounted for 2.2 percent of national employment impact and 2.4 percent of the national wage impact.

Louisiana

Louisiana has homeport operations in New Orleans with itineraries to Northern and Western Caribbean destinations on a year-around basis. It also occasional repositioning itineraries along with other Caribbean regional destinations on longer itineraries. Carnival, Norwegian, Royal Caribbean and Disney each had homeport ships operating out of New Orleans in 2019. As a result, New Orleans saw 586,000 embarkations in 2019, 4.2 percent of the U.S. total and an increase of 6.1 percent from 2018.

Table 20 – Summary of 2019 Cruise Industry Impacts – Louisiana

Louisiana		Share of the U.S.
Passenger Embarkations	586,000	4.2%
Resident Cruise Passengers	227,000	1.6%
Total Passenger Visits & Crew Arrivals	862,000	3.0%
Total Passenger & Crew Onshore Visits	700,000	3.0%
Direct Expenditures (\$ Millions)	\$ 491	2.0%
Total Employment Impact	9,012	2.1%
Total Wage Impact (\$ Millions)	\$ 397	1.6%

Source: Cruise Lines International Association and Business Research and Economic Advisors

Cruise passengers sourced from Louisiana accounted for 1.6 percent of U.S.-sourced passengers and totaled 227,000 during 2019. Thus, Louisiana was a net importer of cruise passengers. Relative to 2018, Louisiana experienced a 7.2 percent increase in the number of resident cruise passengers.

New Orleans generated an estimated 700,000 passenger and crew onshore visits, accounting for 3.0 percent of all passenger and crew onshore visits in the United States. This was a 8.6 percent increase from 2018. These visits produced an estimated \$136 million in passenger and crew onshore spending in Louisiana, or about \$194 per passenger and crew onshore visit. Passenger and crew spending increased by about 5.9 percent from 2018.

Direct cruise industry expenditures rose by 3.0 percent to \$491 million, or 2.0 percent of the direct expenditures generated by the cruise industry in the United States. Tourism-related businesses, such as travel agencies, airlines, hotels, etc., received approximately \$338 million, 69 percent of the industry's direct expenditures in Louisiana. Another \$106 million, 19 percent of the direct expenditures, was spent with businesses in four additional business segments, petroleum refiners and distributors and transportation equipment manufacturers within the manufacturing sector; and wholesale trade and advertising firms in the

nonmanufacturing sector. The remaining direct expenditures in Louisiana also impacted many other industries throughout the state including food and beverage and machinery manufacturers and business service companies such as finance and insurance carrier firms.

Finally, these direct expenditures generated total economic impacts of 9,000 jobs and \$397 million in income throughout the Louisiana economy during 2019. These impacts accounted for 2.1 percent of national employment impact and 1.6 percent of the national wage impact. The employment impact rose by 0.5 percent while the wage impact rose by 2.9 percent.

Economic Impacts in the Remaining States

The direct expenditures generated by the international cruise industry and their total economic impacts in each of the states in 2019 are shown in **Table 21**. As discussed above, the magnitude of the economic impacts in each state is dependent upon the scope of cruise operations, if any, the number of resident cruise passengers and the value of vendor purchases. The 40 states and the District of Columbia outside the top ten states accounted for 23 percent of the cruise industry's direct expenditures in 2019 virtually unchanged from 24 percent in 2018. Most of the states outside of the top ten are source markets for cruise passengers and supply vendor goods and services. Some states, such as Hawaii, Massachusetts, Maryland, and South Carolina, have cruise operations, as well. These four states ranked 11th, 14th, 21st and 25th respectively in terms of direct industry expenditures during 2019.

Passenger embarkations in Hawaii reached over 129,500 in 2019 which is 4.2 percent higher than in 2018. In Massachusetts, the Port of Boston had about 115,000 embarkations, the Port of Baltimore in Maryland reported 215,600 embarkations, and the Port of Charleston in South Carolina showed to have accommodated about 221,000 embarking passengers. While passenger data plays an important role in the magnitude of economic impacts, these states illustrate how embarking passenger data is only one aspect of total industry spending factors within each state.

Table 21 – Direct Expenditures and Total Employment and Wage Impacts of the International Cruise Industry for All States, 2019

State	2019	2018	Direct Purchases (\$ Millions)	Share of U.S.	Total Emp	Share Of U.S.	Total Income	Share Of U.S.	Avg Wage
Florida	1	1	\$ 9,043	36.0%	158,992	36.4%	\$ 8,063	33.0%	\$ 50.7
California	2	2	\$ 2,596	10.3%	50,193	11.5%	\$ 3,318	13.6%	\$ 66.1
Texas	3	3	\$ 1,610	6.4%	26,872	6.2%	\$ 1,815	7.4%	\$ 67.6
New York	4	4	\$ 1,309	5.2%	17,366	4.0%	\$ 1,157	4.7%	\$ 66.6
Alaska	5	5	\$ 1,276	5.1%	23,008	5.3%	\$ 1,226	5.0%	\$ 53.3
Washington	6	6	\$ 1,079	4.3%	22,750	5.2%	\$ 1,345	5.5%	\$ 59.1
Georgia	7	7	\$ 772	3.1%	14,233	3.3%	\$ 799	3.3%	\$ 56.2
Illinois	8	8	\$ 619	2.5%	9,935	2.3%	\$ 646	2.6%	\$ 65.0
New Jersey	9	9	\$ 526	2.1%	9,609	2.2%	\$ 581	2.4%	\$ 60.5
Louisiana	10	10	\$ 491	2.0%	9,012	2.1%	\$ 397	1.6%	\$ 44.1
Hawaii	11	12	\$ 464	1.8%	7,059	1.6%	\$ 261	1.1%	\$ 37.0
Pennsylvania	12	11	\$ 463	1.8%	7,286	1.7%	\$ 449	1.8%	\$ 61.6
Colorado	13	13	\$ 415	1.6%	2,823	0.6%	\$ 180	0.7%	\$ 63.9
Massachusetts	14	14	\$ 388	1.5%	5,830	1.3%	\$ 427	1.7%	\$ 73.2
Indiana	15	15	\$ 346	1.4%	8,473	1.9%	\$ 449	1.8%	\$ 53.0
North Carolina	16	16	\$ 308	1.2%	4,650	1.1%	\$ 231	0.9%	\$ 49.8
Michigan	17	17	\$ 285	1.1%	3,906	0.9%	\$ 228	0.9%	\$ 58.4
Virginia	18	21	\$ 262	1.0%	3,812	0.9%	\$ 231	0.9%	\$ 60.7
Ohio	19	20	\$ 255	1.0%	4,840	1.1%	\$ 248	1.0%	\$ 51.3
Arizona	20	19	\$ 247	1.0%	4,188	1.0%	\$ 196	0.8%	\$ 46.7
Maryland	21	18	\$ 242	1.0%	3,890	0.9%	\$ 223	0.9%	\$ 57.4
Connecticut	22	22	\$ 237	0.9%	1,968	0.5%	\$ 175	0.7%	\$ 89.1
Oregon	23	23	\$ 196	0.8%	5,608	1.3%	\$ 287	1.2%	\$ 51.1
Alabama	24	24	\$ 195	0.8%	2,830	0.6%	\$ 138	0.6%	\$ 48.6
South Carolina	25	26	\$ 178	0.7%	3,474	0.8%	\$ 142	0.6%	\$ 40.9
Missouri	26	25	\$ 169	0.7%	3,812	0.9%	\$ 202	0.8%	\$ 52.9
Minnesota	27	27	\$ 133	0.5%	2,522	0.6%	\$ 154	0.6%	\$ 61.0
Tennessee	28	28	\$ 112	0.4%	2,038	0.5%	\$ 96	0.4%	\$ 46.9
Nevada	29	29	\$ 108	0.4%	1,616	0.4%	\$ 76	0.3%	\$ 46.7
Wisconsin	30	30	\$ 73	0.3%	1,260	0.3%	\$ 59	0.2%	\$ 46.7
Kentucky	31	32	\$ 70	0.3%	1,589	0.4%	\$ 72	0.3%	\$ 45.1
Maine	32	31	\$ 68	0.3%	1,021	0.2%	\$ 36	0.1%	\$ 35.3
Mississippi	33	37	\$ 64	0.3%	824	0.2%	\$ 32	0.1%	\$ 38.8
Kansas	34	33	\$ 63	0.3%	1,981	0.5%	\$ 98	0.4%	\$ 49.4
Utah	35	34	\$ 60	0.2%	1,426	0.3%	\$ 61	0.2%	\$ 42.5
Oklahoma	36	35	\$ 53	0.2%	1,083	0.2%	\$ 48	0.2%	\$ 43.9
Iowa	37	38	\$ 49	0.2%	453	0.1%	\$ 19	0.1%	\$ 42.1
Dist. of Col.	38	36	\$ 48	0.2%	297	0.1%	\$ 44	0.2%	\$148.4
Arkansas	39	39	\$ 38	0.1%	732	0.2%	\$ 28	0.1%	\$ 38.7
Delaware	40	41	\$ 36	0.1%	324	0.1%	\$ 20	0.1%	\$ 60.9
New Hampshire	41	40	\$ 35	0.1%	395	0.1%	\$ 23	0.1%	\$ 58.2
Nebraska	42	42	\$ 30	0.1%	574	0.1%	\$ 28	0.1%	\$ 49.0
Rhode Island	43	43	\$ 30	0.1%	446	0.1%	\$ 19	0.1%	\$ 43.6
New Mexico	44	44	\$ 20	0.1%	315	0.1%	\$ 16	0.1%	\$ 52.0
Idaho	45	45	\$ 19	0.1%	357	0.1%	\$ 15	0.1%	\$ 43.1
West Virginia	46	46	\$ 15	0.1%	320	0.1%	\$ 14	0.1%	\$ 43.1
Vermont	47	47	\$ 14	0.1%	100	0.0%	\$ 6	0.0%	\$ 59.6
North Dakota	48	48	\$ 10	0.0%	207	0.0%	\$ 7	0.0%	\$ 35.9
South Dakota	49	50	\$ 8	0.0%	118	0.0%	\$ 4	0.0%	\$ 36.8
Montana	50	49	\$ 8	0.0%	133	0.0%	\$ 6	0.0%	\$ 45.7
Wyoming	51	51	\$ 4	0.0%	61	0.0%	\$ 3	0.0%	\$ 52.5
U. S. Total			\$ 25,136		436,611		\$24,399		\$ 55.9

Source: Business Research and Economic Advisors

Appendix I – State Impact Methodology

As described in Section I of this report, Member Cruise Lines of CLIA were asked to provide data on aggregate domestic and international expenditures for their operating and administrative expenses. Responses were directly obtained from 18 cruise lines. Spending for the remaining lines were estimated from annual reports, 10K's and other financial reporting. These data were used to develop the estimates of the overall spending of the cruise industry in the United States. As indicated in Section I, we estimated that the industry spent \$25.1 billion on goods and services in the United States. Of this total, \$12.5 billion represented direct payments by the cruise lines to U.S. suppliers for operating and administrative goods and services. The remaining \$12.6 billion represented expenditures by passengers for air travel and other goods and services, wage payments to the U.S. resident employees of the cruise lines and their associations, and port-related expenses and travel agent commissions paid by the cruise lines.

In addition to the aggregate revenue and expense data for 2019, more detailed data on vendor purchases were previously obtained from a smaller group of cruise lines.¹² These data were then aggregated by industry group and state and used to estimate total cruise industry expenditures by industry. These data listed the type of commodities and services that were purchased, as well as the location of the vendors. As a result, we were able to establish industry- and state-specific shares for the cruise industry purchases. Using these shares, the national direct vendor purchases for 2019 were allocated to the corresponding industries in each state.

The \$12.6 billion in core cruise travel expenditures were allocated to each state using data on the place of residence of cruise passengers and passenger embarkations as described in Section I of this report. During 2019, the cruise industry spent \$4.4 billion for port services and wages of their U.S.-resident employees. The \$1.6 billion in wages of the employees of the cruise lines were allocated to each state based upon state-specific employment and wage data received from the cruise lines. The remaining \$2.7 billion in U.S. port service expenditures were allocated to each state based upon its share of U.S. passenger visits and crew arrivals. For example, Florida, which accounted for 47 percent of total passenger visits and crew arrivals to U.S. ports, was allocated about \$1.3 billion in port service spending.

¹² Vendor-specific data were obtained for the following cruise lines: Carnival Cruise Lines, Royal Caribbean International, Celebrity Cruises, Holland America Line, and Princess Cruises. These five cruise lines accounted for approximately 75 percent of the industry's non-wage U.S. operating and administrative expenses.

The \$2.5 billion in air transportation expenditures was split in half, one-half representing the origination of air travel (sourced passengers state) and the other half representing the destination of air travel (embarkation state). The origination half of air travel expenditures were allocated to each state based upon its share of U.S.-sourced cruise passengers. Thus, New Jersey, which accounted for 2.9 percent of U.S. passengers sourced from the United States, was allocated \$36 million for the origination component of air travel spending. New Jersey also accounted for 2.5 percent of U.S. cruise embarkations and thus was allocated another \$31 million for the destination component of air travel spending. Thus, New Jersey received a total allocation of approximately \$67 million in direct air transportation expenditures, 2.7 percent of national expenditures for air transportation generated by the international cruise industry.

The \$3.2 billion in U.S. transportation services expenditures consists of \$600 million in expenditures for passenger shore excursions and \$2.6 billion for travel agent commissions and other miscellaneous ground transportation services, such as bus service between airports. Since these latter services are spread out through all states of the economy, the total was allocated to each state based upon its share of U.S. passengers on a place-of-residence basis. Thus Texas, which accounted for 9.6 percent of U.S.-resident cruise passengers, was allocated approximately \$250 million of the \$2.6 billion in transportation service expenditures. The separate allocation of the \$600 million in expenditures for shore excursions is discussed below.

Finally, the \$2.6 billion in passenger and crew spending and the \$600 million in passenger shore excursion expenditures were the sum of the states, based upon each state's embarkations, split between overnight stays and day of cruise arrivals, estimated port-of-call arrivals and estimated crew arrivals. Total U.S. spending for the four categories was reported in Table 6 in Section I. When possible, survey data were used to estimate spending for each category for each state. Passenger and crew spending estimates were based on data collected from various research reports prepared by BREA and other researchers for the following ports: Port Canaveral, Port Everglades, Port of Miami, Port of New Orleans, Port of New York, Port of Tampa, Port of San Diego, Port of Los Angeles, Port of Seattle, the Ports of Maine and Hawaii and Alaska ports-of-call. Per passenger spending estimates for the ports-of-embarkation were used to estimate total passenger spending at each of the ports. The average for the ports was then used to estimate total passenger spending for all other passenger embarkations.¹³

¹³ Per passenger spending estimates were segmented by passengers who stayed overnight either prior to or after a cruise and those passengers who arrived on the day of the cruise.

For example, survey data representing the five embarkation cruise ports in Florida indicated that 44.3 percent of embarking cruise passengers stayed one or more nights in the port city and that these passengers spent an average of about \$259 during their stay. Thus, 3.7 million (0.443 x 8.3 million) cruise passengers were estimated to have spent \$951 million on lodging, food, entertainment, etc. in Florida during 2019¹⁴. The remaining 4.6 million Florida cruise passengers (day of cruise arrivals) spent an average of \$37 per passenger for a total of \$170 million. An estimated 1.2 million passengers disembarked their ships and visited Florida ports as port-of-call or transit passengers. These passengers spent an average of \$69 per visit, resulting in total expenditures of approximately \$83 million. Finally, crew who went ashore spent an average of \$104 on each call to a Florida port. An estimated 1.6 million crew disembarked cruise ships and visited Florida during 2019 and spent \$163 million. Thus, we have estimated that passengers and crew spent approximately \$1.37 billion in Florida during 2019, 42 percent of total passenger and crew spending (excluding travel) in the United States.

By comparison, passengers and crew were estimated to have spent \$161 million (5 percent of total U.S. spending by passengers and crew) in California during 2019. Approximately 36 percent, or \$58 million, was spent by embarking passengers who spent one or more nights in the city of embarkation in California. Passengers who stayed overnight at least one night in California spent an average of \$168.

Alaska received an estimated 4.2 million cruise passenger onshore visits during 2019. This includes approximately 221,000 passengers who either embarked or disembarked on their cruise in Alaska. Combined, all cruise passengers spent an average of \$153 per onshore visit. Thus, we have estimated that \$644 million was spent by cruise passengers visiting Alaska ports. An estimated 728,000 onshore crew visits generated another \$8.1 million. Thus, cruise passengers and crew spent a total of \$652 million in Alaska, accounting for 20 percent of total passenger and crew spending in the United States.

Passenger and crew expenditures were allocated to the remaining states using average per visit spending estimates from all available surveys.

Thus, the \$25.1 billion in U.S. expenditures paid by the international cruise industry and its passengers and crew were allocated among all states and the District of Columbia. The total value of the direct spending by state is shown in Table 10 in Section II. The direct spending data by industry in each state are shown in the individual state tables in Appendix II that follows.

¹⁴ Financial data adjusted for inflation from year of reference

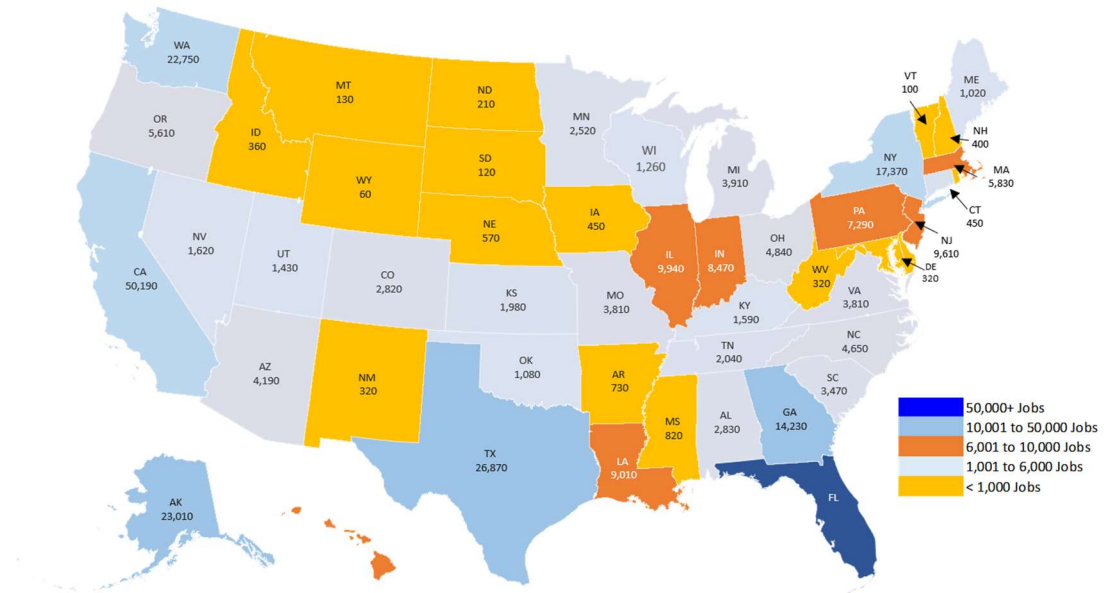
The industry direct expenditure data in each state was then converted to value-added using national ratios of value-added to output for each industry. Using industry- and state-specific ratios of compensation-to-value-added, implied compensation in each industry and state was estimated for the direct expenditures. The direct employment impacts resulting from the direct industry spending were estimated by dividing the wage compensation estimates by industry- and state-specific annual compensation rates. All of these data were obtained from the most recent data available from the Bureau of Economic Analysis (BEA).

The direct employment estimates were then multiplied by the BEA employment multipliers to generate the estimates of the total employment contribution of the cruise industry by state and industry. Finally, the employment estimates were multiplied by average annual compensation rates to estimate the total effect on wage compensation in each state. The total employment and wage contribution of the international cruise industry by state and industry are shown in Appendix II.

The estimated direct and total economic impacts at the state level were controlled to sum to the national economic impacts on an industry-by-industry basis. Thus, the estimated state economic impacts for direct purchases, employment and wage income sum to the national impacts.

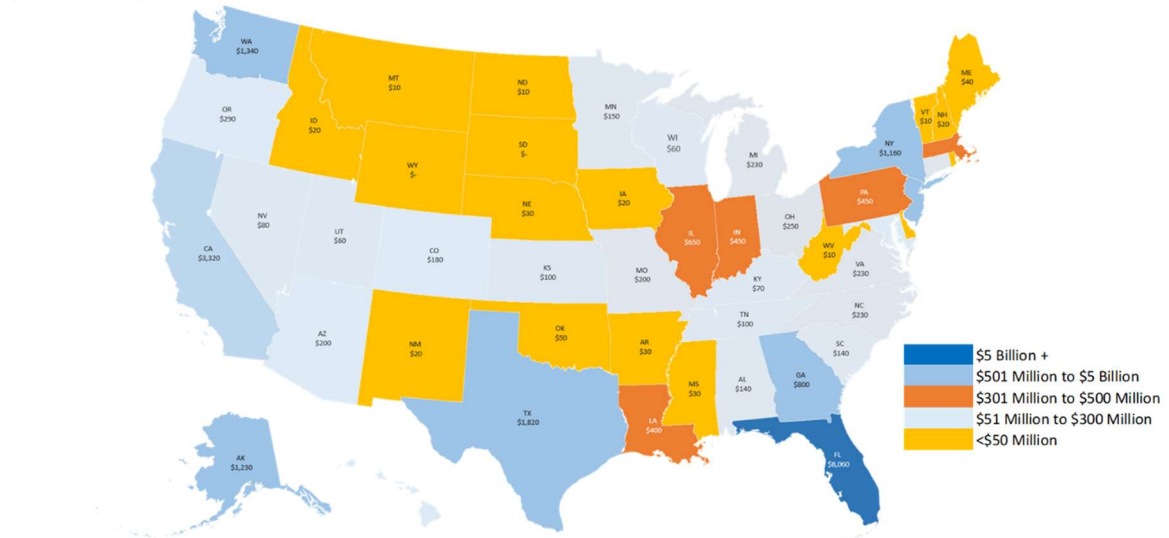
Appendix II – Individual State Tables

Figure 10 – Total Employment Impact of the International Cruise Industry by State – 2019 (Thousands)



Source: Business Research and Economic Advisors

Figure 11 – Total Income Impact of the International Cruise Industry by State – 2019 (\$ Millions)



Source: Business Research and Economic Advisors

Table 22 – Total Economic Impacts – Alabama - 2019

Source: Business Research and Economic Advisors

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	48	\$ 4,674
Manufacturing	\$ 72,014	455	\$ 31,323
Nondurable Goods	\$ 20,593	256	\$ 21,595
Durable Goods	\$ 51,421	199	\$ 9,728
Wholesale & Retail Trade	\$ 8,350	205	\$ 9,432
Transportation	\$ 54,902	374	\$ 17,301
Information Services	\$ 1	10	\$ 837
Finance, Insurance, Real Estate & Leasing	\$ 7,890	62	\$ 4,764
Services & Government	\$ 51,572	1,676	\$ 69,330
Total	\$ 194,729	2,830	\$ 137,660

Table 23 – Total Economic Impacts – Alaska - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 6,688	1,571	\$ 271,949
Manufacturing	\$ 64,453	470	\$ 28,920
Nondurable Goods	\$ 43,724	126	\$ 8,993
Durable Goods	\$ 20,729	344	\$ 19,927
Wholesale & Retail Trade	\$ 124,238	1,967	\$ 75,766
Transportation	\$ 550,389	7,856	\$ 419,266
Information Services	\$ 2,659	95	\$ 6,518
Finance, Insurance, Real Estate & Leasing	\$ 3,091	163	\$ 10,263
Services & Government	\$ 524,365	10,886	\$ 413,229
Total	\$ 1,275,882	23,008	\$ 1,225,911

Source: Business Research and Economic Advisors

Table 24 – Total Economic Impacts – Arizona - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	117	\$ 8,193
Manufacturing	\$ 6,820	221	\$ 18,188
Nondurable Goods	\$ 1,154	185	\$ 16,353
Durable Goods	\$ 5,666	36	\$ 1,835
Wholesale & Retail Trade	\$ 888	138	\$ 9,431
Transportation	\$ 31,466	251	\$ 18,154
Information Services	\$ 25,655	99	\$ 7,527
Finance, Insurance, Real Estate & Leasing	\$ 17,209	218	\$ 12,303
Services & Government	\$ 164,486	3,144	\$ 121,973
Total	\$ 246,525	4,188	\$ 195,770

Source: Business Research and Economic Advisors

Table 25 – Total Economic Impacts – Arkansas - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	10	\$ 664
Manufacturing	\$ 5,308	90	\$ 4,190
Nondurable Goods	\$ 5,259	28	\$ 1,641
Durable Goods	\$ 49	62	\$ 2,549
Wholesale & Retail Trade	\$ 11	28	\$ 997
Transportation	\$ 8,517	45	\$ 3,469
Information Services	\$ 2	2	\$ 120
Finance, Insurance, Real Estate & Leasing	\$ 3,112	17	\$ 988
Services & Government	\$ 20,732	540	\$ 17,873
Total	\$ 37,683	732	\$ 28,300

Source: Business Research and Economic Advisors

Table 26 – Total Economic Impacts – California - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 545	2,082	\$ 193,978
Manufacturing	\$ 674,806	6,170	\$ 570,362
Nondurable Goods	\$ 431,565	4,129	\$ 423,767
Durable Goods	\$ 243,240	2,041	\$ 146,595
Wholesale & Retail Trade	\$ 124,765	3,459	\$ 217,508
Transportation	\$ 498,079	5,699	\$ 263,105
Information Services	\$ 28,200	883	\$ 129,765
Finance, Insurance, Real Estate & Leasing	\$ 91,061	3,421	\$ 290,625
Services & Government	\$ 1,178,444	28,478	\$ 1,652,433
Total	\$ 2,595,900	50,193	\$ 3,317,776

Source: Business Research and Economic Advisors

Table 27 – Total Economic Impacts – Colorado - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 1	43	\$ 5,853
Manufacturing	\$ 270,662	240	\$ 26,252
Nondurable Goods	\$ 241,357	151	\$ 17,396
Durable Goods	\$ 29,306	89	\$ 8,856
Wholesale & Retail Trade	\$ 48,282	323	\$ 22,650
Transportation	\$ 24,256	252	\$ 17,306
Information Services	\$ 943	25	\$ 2,858
Finance, Insurance, Real Estate & Leasing	\$ 10,906	169	\$ 13,370
Services & Government	\$ 59,688	1,771	\$ 91,983
Total	\$ 414,738	2,823	\$ 180,273

Source: Business Research and Economic Advisors

Table 28 – Total Economic Impacts – Connecticut - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 0	18	\$ 2,324
Manufacturing	\$ 120,914	381	\$ 53,441
Nondurable Goods	\$ 3,681	324	\$ 48,219
Durable Goods	\$ 117,233	56	\$ 5,223
Wholesale & Retail Trade	\$ 1,527	137	\$ 7,986
Transportation	\$ 11,267	70	\$ 5,433
Information Services	\$ 3,653	14	\$ 1,572
Finance, Insurance, Real Estate & Leasing	\$ 39,566	133	\$ 20,043
Services & Government	\$ 59,899	1,214	\$ 84,494
Total	\$ 236,825	1,968	\$ 175,294

Source: Business Research and Economic Advisors

Table 29 – Total Economic Impacts – Delaware - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	2	\$ 195
Manufacturing	\$ 754	18	\$ 1,169
Nondurable Goods	\$ 521	6	\$ 559
Durable Goods	\$ 233	12	\$ 610
Wholesale & Retail Trade	\$ 52	14	\$ 599
Transportation	\$ 3,864	10	\$ 1,166
Information Services	\$ -	1	\$ 111
Finance, Insurance, Real Estate & Leasing	\$ 16,387	15	\$ 1,379
Services & Government	\$ 15,107	265	\$ 15,105
Total	\$ 36,164	324	\$ 19,724

Source: Business Research and Economic Advisors

Table 30 – Total Economic Impacts – District of Columbia - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	1	\$ 104
Manufacturing	\$ 27	1	\$ 130
Nondurable Goods	\$ 22	0	\$ 58
Durable Goods	\$ 4	1	\$ 72
Wholesale & Retail Trade	\$ 1	2	\$ 131
Transportation	\$ 3,056	8	\$ 1,037
Information Services	\$ 1	2	\$ 253
Finance, Insurance, Real Estate & Leasing	\$ 2,027	22	\$ 3,582
Services & Government	\$ 42,857	261	\$ 38,830
Total	\$ 47,968	297	\$ 44,065

Source: Business Research and Economic Advisors

Table 31 – Total Economic Impacts – Florida – 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 18,321	4,142	\$ 273,359
Manufacturing	\$ 2,139,070	11,709	\$ 848,999
Nondurable Goods	\$ 1,024,845	8,124	\$ 603,672
Durable Goods	\$ 1,114,225	3,584	\$ 245,327
Wholesale & Retail Trade	\$ 443,576	9,477	\$ 552,596
Transportation	\$ 3,004,188	35,363	\$ 1,815,748
Information Services	\$ 109,715	1,751	\$ 146,841
Finance, Insurance, Real Estate & Leasing	\$ 56,745	8,906	\$ 582,670
Services & Government	\$ 3,271,475	87,645	\$ 3,843,121
Total	\$ 9,043,090	158,992	\$ 8,063,334

Source: Business Research and Economic Advisors

Table 32 – Total Economic Impacts – Georgia - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 391	459	\$ 29,849
Manufacturing	\$ 201,050	1,720	\$ 120,771
Nondurable Goods	\$ 92,870	1,039	\$ 76,362
Durable Goods	\$ 108,179	681	\$ 44,408
Wholesale & Retail Trade	\$ 18,430	727	\$ 52,196
Transportation	\$ 157,777	1,665	\$ 83,034
Information Services	\$ 9,107	239	\$ 21,849
Finance, Insurance, Real Estate & Leasing	\$ 39,364	1,548	\$ 103,178
Services & Government	\$ 345,536	7,875	\$ 388,388
Total	\$ 771,653	14,233	\$ 799,265

Source: Business Research and Economic Advisors

Table 33 – Total Economic Impacts – Hawaii - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 11	14	\$ 1,095
Manufacturing	\$ 27,279	113	\$ 6,228
Nondurable Goods	\$ 20,044	50	\$ 3,569
Durable Goods	\$ 7,234	63	\$ 2,659
Wholesale & Retail Trade	\$ 14,317	135	\$ 6,303
Transportation	\$ 232,442	2,515	\$ 72,542
Information Services	\$ 74	8	\$ 432
Finance, Insurance, Real Estate & Leasing	\$ 2,548	36	\$ 2,474
Services & Government	\$ 187,542	4,237	\$ 171,947
Total	\$ 464,213	7,059	\$ 261,021

Source: Business Research and Economic Advisors

Table 34 – Total Economic Impacts – Idaho - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	8	\$ 455
Manufacturing	\$ 1,165	26	\$ 1,647
Nondurable Goods	\$ 974	11	\$ 985
Durable Goods	\$ 191	15	\$ 663
Wholesale & Retail Trade	\$ 37	18	\$ 643
Transportation	\$ 3,477	23	\$ 1,319
Information Services	\$ 98	1	\$ 70
Finance, Insurance, Real Estate & Leasing	\$ 1,857	10	\$ 584
Services & Government	\$ 12,302	272	\$ 10,657
Total	\$ 18,938	357	\$ 15,375

Source: Business Research and Economic Advisors

Table 35 – Total Economic Impacts – Illinois - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 3	259	\$ 27,299
Manufacturing	\$ 226,358	1,920	\$ 168,734
Nondurable Goods	\$ 101,469	1,317	\$ 119,750
Durable Goods	\$ 124,890	603	\$ 48,983
Wholesale & Retail Trade	\$ 25,908	646	\$ 50,682
Transportation	\$ 37,922	810	\$ 47,247
Information Services	\$ 38,048	231	\$ 24,784
Finance, Insurance, Real Estate & Leasing	\$ 69,962	731	\$ 61,386
Services & Government	\$ 220,922	5,337	\$ 265,441
Total	\$ 619,124	9,935	\$ 645,572

Source: Business Research and Economic Advisors

Table 36 – Total Economic Impacts – Indiana - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 0	83	\$ 6,907
Manufacturing	\$ 7,515	1,100	\$ 80,514
Nondurable Goods	\$ 4,845	784	\$ 60,627
Durable Goods	\$ 2,670	316	\$ 19,887
Wholesale & Retail Trade	\$ 408	548	\$ 20,652
Transportation	\$ 17,324	318	\$ 19,349
Information Services	\$ 435	31	\$ 2,161
Finance, Insurance, Real Estate & Leasing	\$ 17,015	184	\$ 12,784
Services & Government	\$ 303,115	6,209	\$ 306,703
Total	\$ 345,811	8,473	\$ 449,070

Source: Business Research and Economic Advisors

Table 37 – Total Economic Impacts – Iowa - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 0	3	\$ 252
Manufacturing	\$ 5,636	44	\$ 2,597
Nondurable Goods	\$ 5,631	15	\$ 1,055
Durable Goods	\$ 5	30	\$ 1,542
Wholesale & Retail Trade	\$ 2	18	\$ 626
Transportation	\$ 5,503	24	\$ 1,502
Information Services	\$ 35	2	\$ 112
Finance, Insurance, Real Estate & Leasing	\$ 22,640	43	\$ 3,236
Services & Government	\$ 15,035	319	\$ 10,727
Total	\$ 48,852	453	\$ 19,052

Source: Business Research and Economic Advisors

Table 38 – Total Economic Impacts – Kansas - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 200	42	\$ 3,054
Manufacturing	\$ 5,465	257	\$ 15,845
Nondurable Goods	\$ 2,532	153	\$ 10,624
Durable Goods	\$ 2,933	104	\$ 5,221
Wholesale & Retail Trade	\$ 118	136	\$ 5,222
Transportation	\$ 26,843	471	\$ 27,392
Information Services	\$ 2	18	\$ 1,481
Finance, Insurance, Real Estate & Leasing	\$ 8,086	73	\$ 4,759
Services & Government	\$ 22,513	985	\$ 40,120
Total	\$ 63,227	1,981	\$ 97,873

Source: Business Research and Economic Advisors

Table 39 – Total Economic Impacts – Kentucky - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	21	\$ 1,354
Manufacturing	\$ 12,545	152	\$ 9,256
Nondurable Goods	\$ 11,999	74	\$ 5,359
Durable Goods	\$ 546	78	\$ 3,896
Wholesale & Retail Trade	\$ 848	85	\$ 3,209
Transportation	\$ 11,269	93	\$ 6,898
Information Services	\$ 135	6	\$ 390
Finance, Insurance, Real Estate & Leasing	\$ 7,122	38	\$ 2,779
Services & Government	\$ 37,783	1,194	\$ 47,822
Total	\$ 69,699	1,589	\$ 71,708

Source: Business Research and Economic Advisors

Table 40 – Total Economic Impacts – Louisiana - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 15	589	\$ 60,292
Manufacturing	\$ 68,542	628	\$ 54,590
Nondurable Goods	\$ 23,561	340	\$ 25,001
Durable Goods	\$ 44,981	288	\$ 29,588
Wholesale & Retail Trade	\$ 20,168	532	\$ 25,371
Transportation	\$ 129,421	1,840	\$ 62,035
Information Services	\$ 29	40	\$ 2,570
Finance, Insurance, Real Estate & Leasing	\$ 7,750	212	\$ 11,847
Services & Government	\$ 265,291	5,170	\$ 180,541
Total	\$ 491,217	9,012	\$ 397,247

Source: Business Research and Economic Advisors

Table 41 – Total Economic Impacts – Maine - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	23	\$ 1,138
Manufacturing	\$ 18,902	117	\$ 6,918
Nondurable Goods	\$ 1,294	76	\$ 4,516
Durable Goods	\$ 17,609	41	\$ 2,403
Wholesale & Retail Trade	\$ 10,928	148	\$ 5,657
Transportation	\$ 9,572	72	\$ 2,717
Information Services	\$ 135	5	\$ 345
Finance, Insurance, Real Estate & Leasing	\$ 3,791	30	\$ 2,083
Services & Government	\$ 24,236	625	\$ 17,163
Total	\$ 67,564	1,021	\$ 36,021

Source: Business Research and Economic Advisors

Table 42 – Total Economic Impacts – Maryland - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	32	\$ 2,991
Manufacturing	\$ 45,281	249	\$ 20,278
Nondurable Goods	\$ 25,210	128	\$ 13,147
Durable Goods	\$ 20,071	122	\$ 7,131
Wholesale & Retail Trade	\$ 10,872	283	\$ 13,841
Transportation	\$ 55,165	467	\$ 22,549
Information Services	\$ 7,905	26	\$ 2,901
Finance, Insurance, Real Estate & Leasing	\$ 14,659	176	\$ 15,815
Services & Government	\$ 108,328	2,658	\$ 144,718
Total	\$ 242,212	3,890	\$ 223,094

Source: Business Research and Economic Advisors

Table 43 – Total Economic Impacts – Massachusetts - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	71	\$ 6,595
Manufacturing	\$ 54,079	448	\$ 45,544
Nondurable Goods	\$ 13,580	301	\$ 35,580
Durable Goods	\$ 40,499	147	\$ 9,964
Wholesale & Retail Trade	\$ 8,888	254	\$ 18,011
Transportation	\$ 44,989	493	\$ 20,688
Information Services	\$ 4,952	91	\$ 11,478
Finance, Insurance, Real Estate & Leasing	\$ 26,170	1,101	\$ 122,626
Services & Government	\$ 248,978	3,372	\$ 201,719
Total	\$ 388,057	5,830	\$ 426,662

Source: Business Research and Economic Advisors

Table 44 – Total Economic Impacts – Michigan - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 0	36	\$ 3,104
Manufacturing	\$ 87,684	527	\$ 39,645
Nondurable Goods	\$ 69,581	311	\$ 26,134
Durable Goods	\$ 18,103	216	\$ 13,511
Wholesale & Retail Trade	\$ 16,516	283	\$ 14,684
Transportation	\$ 28,725	145	\$ 12,914
Information Services	\$ 1,098	15	\$ 1,342
Finance, Insurance, Real Estate & Leasing	\$ 24,442	135	\$ 10,204
Services & Government	\$ 126,347	2,765	\$ 146,250
Total	\$ 284,813	3,906	\$ 228,143

Source: Business Research and Economic Advisors

Table 45 – Total Economic Impacts – Minnesota - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	27	\$ 2,318
Manufacturing	\$ 22,161	288	\$ 22,108
Nondurable Goods	\$ 16,581	164	\$ 14,403
Durable Goods	\$ 5,579	124	\$ 7,704
Wholesale & Retail Trade	\$ 1,533	168	\$ 8,053
Transportation	\$ 15,876	151	\$ 9,992
Information Services	\$ 3,582	21	\$ 1,988
Finance, Insurance, Real Estate & Leasing	\$ 22,809	213	\$ 19,266
Services & Government	\$ 67,155	1,655	\$ 89,999
Total	\$ 133,117	2,522	\$ 153,722

Source: Business Research and Economic Advisors

Table 46 – Total Economic Impacts – Mississippi – 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	15	\$ 987
Manufacturing	\$ 31,923	163	\$ 9,460
Nondurable Goods	\$ 1,797	122	\$ 7,891
Durable Goods	\$ 30,126	42	\$ 1,569
Wholesale & Retail Trade	\$ 213	37	\$ 1,185
Transportation	\$ 8,720	36	\$ 2,057
Information Services	\$ -	2	\$ 104
Finance, Insurance, Real Estate & Leasing	\$ 3,462	17	\$ 972
Services & Government	\$ 19,209	555	\$ 17,212
Total	\$ 63,527	824	\$ 31,977

Source: Business Research and Economic Advisors

Table 47 – Total Economic Impacts – Missouri - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	35	\$ 2,876
Manufacturing	\$ 23,982	374	\$ 23,381
Nondurable Goods	\$ 12,885	207	\$ 14,487
Durable Goods	\$ 11,098	167	\$ 8,893
Wholesale & Retail Trade	\$ 626	241	\$ 9,640
Transportation	\$ 20,796	183	\$ 11,471
Information Services	\$ 10,929	42	\$ 3,390
Finance, Insurance, Real Estate & Leasing	\$ 14,012	269	\$ 17,911
Services & Government	\$ 99,085	2,669	\$ 133,124
Total	\$ 169,431	3,812	\$ 201,792

Source: Business Research and Economic Advisors

Table 48 – Total Economic Impacts – Montana - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 7	3	\$ 277
Manufacturing	\$ 198	3	\$ 211
Nondurable Goods	\$ 186	1	\$ 94
Durable Goods	\$ 13	2	\$ 117
Wholesale & Retail Trade	\$ 7	7	\$ 267
Transportation	\$ 1,310	8	\$ 525
Information Services	\$ 96	1	\$ 47
Finance, Insurance, Real Estate & Leasing	\$ 1,313	7	\$ 470
Services & Government	\$ 4,696	105	\$ 4,277
Total	\$ 7,627	133	\$ 6,075

Source: Business Research and Economic Advisors

Table 49 – Total Economic Impacts – Nebraska - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	7	\$ 451
Manufacturing	\$ 2,554	62	\$ 3,263
Nondurable Goods	\$ 2,354	20	\$ 1,293
Durable Goods	\$ 200	43	\$ 1,970
Wholesale & Retail Trade	\$ 37	39	\$ 1,433
Transportation	\$ 6,155	77	\$ 5,052
Information Services	\$ 389	5	\$ 443
Finance, Insurance, Real Estate & Leasing	\$ 11,046	42	\$ 2,905
Services & Government	\$ 10,135	343	\$ 14,561
Total	\$ 30,315	574	\$ 28,107

Source: Business Research and Economic Advisors

Table 50 – Total Economic Impacts – Nevada - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	14	\$ 1,313
Manufacturing	\$ 25,282	182	\$ 13,780
Nondurable Goods	\$ 3,906	156	\$ 12,686
Durable Goods	\$ 21,376	25	\$ 1,094
Wholesale & Retail Trade	\$ 3,782	82	\$ 3,606
Transportation	\$ 14,050	86	\$ 5,125
Information Services	\$ 221	6	\$ 333
Finance, Insurance, Real Estate & Leasing	\$ 5,385	34	\$ 2,125
Services & Government	\$ 59,456	1,211	\$ 49,238
Total	\$ 108,176	1,616	\$ 75,521

Source: Business Research and Economic Advisors

Table 51 – Total Economic Impacts – New Hampshire - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	3	\$ 312
Manufacturing	\$ 10,244	58	\$ 4,002
Nondurable Goods	\$ 10,208	24	\$ 2,179
Durable Goods	\$ 36	35	\$ 1,823
Wholesale & Retail Trade	\$ 1,391	32	\$ 1,693
Transportation	\$ 4,172	19	\$ 1,399
Information Services	\$ 36	2	\$ 194
Finance, Insurance, Real Estate & Leasing	\$ 4,812	17	\$ 1,605
Services & Government	\$ 14,388	265	\$ 13,780
Total	\$ 35,043	395	\$ 22,984

Source: Business Research and Economic Advisors

Table 52 – Total Economic Impacts – New Jersey - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 140	121	\$ 12,362
Manufacturing	\$ 75,849	645	\$ 58,998
Nondurable Goods	\$ 43,042	360	\$ 32,313
Durable Goods	\$ 32,807	285	\$ 26,686
Wholesale & Retail Trade	\$ 17,112	576	\$ 46,079
Transportation	\$ 144,880	1,353	\$ 66,554
Information Services	\$ 12,818	113	\$ 13,173
Finance, Insurance, Real Estate & Leasing	\$ 31,915	485	\$ 45,821
Services & Government	\$ 242,799	6,318	\$ 338,227
Total	\$ 525,513	9,609	\$ 581,215

Source: Business Research and Economic Advisors

Table 53 – Total Economic Impacts – New Mexico - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	9	\$ 775
Manufacturing	\$ 564	12	\$ 718
Nondurable Goods	\$ 476	6	\$ 493
Durable Goods	\$ 88	6	\$ 225
Wholesale & Retail Trade	\$ 9	16	\$ 521
Transportation	\$ 3,324	15	\$ 1,101
Information Services	\$ 2	1	\$ 78
Finance, Insurance, Real Estate & Leasing	\$ 2,127	11	\$ 627
Services & Government	\$ 14,251	252	\$ 12,557
Total	\$ 20,276	315	\$ 16,378

Source: Business Research and Economic Advisors

Table 54 – Total Economic Impacts – New York - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 1,247	303	\$ 33,961
Manufacturing	\$ 146,530	1,246	\$ 107,600
Nondurable Goods	\$ 78,042	755	\$ 71,190
Durable Goods	\$ 68,488	491	\$ 36,410
Wholesale & Retail Trade	\$ 36,267	886	\$ 63,338
Transportation	\$ 159,588	1,970	\$ 73,799
Information Services	\$ 3,837	224	\$ 26,827
Finance, Insurance, Real Estate & Leasing	\$ 274,363	1,430	\$ 191,366
Services & Government	\$ 687,437	11,307	\$ 660,233
Total	\$ 1,309,268	17,366	\$ 1,157,124

Source: Business Research and Economic Advisors

Table 55 – Total Economic Impacts – North Carolina – 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	50	\$ 3,340
Manufacturing	\$ 94,598	628	\$ 39,438
Nondurable Goods	\$ 78,088	297	\$ 21,438
Durable Goods	\$ 16,510	331	\$ 18,001
Wholesale & Retail Trade	\$ 7,565	280	\$ 12,338
Transportation	\$ 46,038	250	\$ 15,877
Information Services	\$ 2,301	22	\$ 2,076
Finance, Insurance, Real Estate & Leasing	\$ 20,756	133	\$ 10,797
Services & Government	\$ 136,790	3,287	\$ 147,633
Total	\$ 308,048	4,650	\$ 231,500

Source: Business Research and Economic Advisors

Table 56 – Total Economic Impacts – North Dakota - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 35	4	\$ 318
Manufacturing	\$ 468	9	\$ 427
Nondurable Goods	\$ 440	4	\$ 219
Durable Goods	\$ 28	5	\$ 209
Wholesale & Retail Trade	\$ 6	10	\$ 354
Transportation	\$ 1,155	7	\$ 446
Information Services	\$ 275	2	\$ 96
Finance, Insurance, Real Estate & Leasing	\$ 1,567	9	\$ 437
Services & Government	\$ 6,115	166	\$ 5,360
Total	\$ 9,621	207	\$ 7,439

Source: Business Research and Economic Advisors

Table 57 – Total Economic Impacts – Ohio - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 1	44	\$ 3,938
Manufacturing	\$ 49,079	635	\$ 48,243
Nondurable Goods	\$ 10,740	453	\$ 37,128
Durable Goods	\$ 38,339	182	\$ 11,115
Wholesale & Retail Trade	\$ 1,662	302	\$ 12,628
Transportation	\$ 33,031	193	\$ 14,031
Information Services	\$ 82	20	\$ 1,629
Finance, Insurance, Real Estate & Leasing	\$ 37,492	183	\$ 12,904
Services & Government	\$ 133,795	3,465	\$ 154,682
Total	\$ 255,142	4,840	\$ 248,056

Source: Business Research and Economic Advisors

Table 58 – Total Economic Impacts – Oklahoma - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 21	45	\$ 4,809
Manufacturing	\$ 5,335	72	\$ 4,007
Nondurable Goods	\$ 5,154	36	\$ 2,263
Durable Goods	\$ 181	37	\$ 1,744
Wholesale & Retail Trade	\$ 654	58	\$ 2,096
Transportation	\$ 11,888	64	\$ 5,668
Information Services	\$ 9	5	\$ 327
Finance, Insurance, Real Estate & Leasing	\$ 5,837	41	\$ 2,082
Services & Government	\$ 28,843	797	\$ 28,590
Total	\$ 52,586	1,083	\$ 47,580

Source: Business Research and Economic Advisors

Table 59 – Total Economic Impacts – Oregon - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 333	309	\$ 15,581
Manufacturing	\$ 22,590	645	\$ 48,064
Nondurable Goods	\$ 7,005	462	\$ 38,672
Durable Goods	\$ 15,586	183	\$ 9,392
Wholesale & Retail Trade	\$ 1,242	356	\$ 24,449
Transportation	\$ 43,000	1,408	\$ 69,060
Information Services	\$ 507	75	\$ 6,808
Finance, Insurance, Real Estate & Leasing	\$ 7,268	242	\$ 14,133
Services & Government	\$ 120,977	2,573	\$ 108,748
Total	\$ 195,917	5,608	\$ 286,843

Source: Business Research and Economic Advisors

Table 60 – Total Economic Impacts – Pennsylvania - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	222	\$ 20,442
Manufacturing	\$ 174,011	1,402	\$ 106,238
Nondurable Goods	\$ 41,642	1,019	\$ 79,969
Durable Goods	\$ 132,369	383	\$ 26,269
Wholesale & Retail Trade	\$ 19,988	406	\$ 27,873
Transportation	\$ 62,217	752	\$ 42,837
Information Services	\$ 2,341	102	\$ 8,479
Finance, Insurance, Real Estate & Leasing	\$ 35,699	818	\$ 60,599
Services & Government	\$ 168,506	3,584	\$ 182,678
Total	\$ 462,760	7,286	\$ 449,146

Source: Business Research and Economic Advisors

Table 61 – Total Economic Impacts – Rhode Island - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	4	\$ 267
Manufacturing	\$ 674	29	\$ 1,796
Nondurable Goods	\$ 218	20	\$ 1,348
Durable Goods	\$ 456	9	\$ 448
Wholesale & Retail Trade	\$ 2,184	30	\$ 1,300
Transportation	\$ 8,064	51	\$ 2,051
Information Services	\$ -	2	\$ 185
Finance, Insurance, Real Estate & Leasing	\$ 4,860	15	\$ 1,176
Services & Government	\$ 13,762	315	\$ 12,656
Total	\$ 29,544	446	\$ 19,431

Source: Business Research and Economic Advisors

Table 62 – Total Economic Impacts – South Carolina - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	47	\$ 3,502
Manufacturing	\$ 36,658	407	\$ 25,246
Nondurable Goods	\$ 10,960	234	\$ 15,781
Durable Goods	\$ 25,698	173	\$ 9,464
Wholesale & Retail Trade	\$ 6,307	234	\$ 8,669
Transportation	\$ 63,692	568	\$ 24,685
Information Services	\$ -	11	\$ 768
Finance, Insurance, Real Estate & Leasing	\$ 6,821	66	\$ 4,452
Services & Government	\$ 64,775	2,141	\$ 74,855
Total	\$ 178,254	3,474	\$ 142,177

Source: Business Research and Economic Advisors

Table 63 – Total Economic Impacts – South Dakota - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	1	\$ 86
Manufacturing	\$ 630	9	\$ 402
Nondurable Goods	\$ 484	4	\$ 207
Durable Goods	\$ 146	5	\$ 195
Wholesale & Retail Trade	\$ 42	7	\$ 216
Transportation	\$ 1,298	6	\$ 336
Information Services	\$ 2	0	\$ 21
Finance, Insurance, Real Estate & Leasing	\$ 2,324	7	\$ 389
Services & Government	\$ 3,491	88	\$ 2,893
Total	\$ 7,786	118	\$ 4,343

Source: Business Research and Economic Advisors

Table 64 – Total Economic Impacts – Tennessee - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 0	12	\$ 636
Manufacturing	\$ 7,861	201	\$ 12,268
Nondurable Goods	\$ 6,944	99	\$ 6,618
Durable Goods	\$ 917	102	\$ 5,650
Wholesale & Retail Trade	\$ 138	115	\$ 4,741
Transportation	\$ 25,095	143	\$ 10,062
Information Services	\$ 78	8	\$ 603
Finance, Insurance, Real Estate & Leasing	\$ 12,025	102	\$ 7,245
Services & Government	\$ 67,200	1,457	\$ 60,095
Total	\$ 112,396	2,038	\$ 95,650

Source: Business Research and Economic Advisors

Table 65 – Total Economic Impacts – Texas – 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 19,452	2,606	\$ 396,092
Manufacturing	\$ 526,089	3,008	\$ 275,551
Nondurable Goods	\$ 315,449	2,109	\$ 192,603
Durable Goods	\$ 210,640	899	\$ 82,948
Wholesale & Retail Trade	\$ 85,191	1,665	\$ 116,876
Transportation	\$ 276,001	4,087	\$ 227,894
Information Services	\$ 12,070	331	\$ 31,846
Finance, Insurance, Real Estate & Leasing	\$ 49,896	2,379	\$ 184,780
Services & Government	\$ 640,811	12,796	\$ 582,273
Total	\$ 1,609,511	26,872	\$ 1,815,313

Source: Business Research and Economic Advisors

Table 66 – Total Economic Impacts – Utah - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 0	16	\$ 1,283
Manufacturing	\$ 1,768	91	\$ 5,326
Nondurable Goods	\$ 1,201	53	\$ 3,646
Durable Goods	\$ 566	38	\$ 1,680
Wholesale & Retail Trade	\$ 152	79	\$ 2,946
Transportation	\$ 16,150	86	\$ 6,529
Information Services	\$ 1,148	11	\$ 794
Finance, Insurance, Real Estate & Leasing	\$ 5,687	72	\$ 4,488
Services & Government	\$ 35,379	1,071	\$ 39,232
Total	\$ 60,284	1,426	\$ 60,599

Source: Business Research and Economic Advisors

Table 67 – Total Economic Impacts – Vermont – 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	1	\$ 101
Manufacturing	\$ 637	9	\$ 768
Nondurable Goods	\$ 475	5	\$ 543
Durable Goods	\$ 162	4	\$ 225
Wholesale & Retail Trade	\$ 17	5	\$ 220
Transportation	\$ 1,057	5	\$ 370
Information Services	\$ 121	1	\$ 54
Finance, Insurance, Real Estate & Leasing	\$ 1,663	5	\$ 448
Services & Government	\$ 10,489	74	\$ 3,998
Total	\$ 13,983	100	\$ 5,959

Source: Business Research and Economic Advisors

Table 68 – Total Economic Impacts – Virginia – 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	32	\$ 2,530
Manufacturing	\$ 92,477	338	\$ 27,170
Nondurable Goods	\$ 13,767	230	\$ 21,557
Durable Goods	\$ 78,710	108	\$ 5,613
Wholesale & Retail Trade	\$ 2,268	198	\$ 8,284
Transportation	\$ 36,154	219	\$ 13,511
Information Services	\$ 918	25	\$ 3,108
Finance, Insurance, Real Estate & Leasing	\$ 12,397	409	\$ 35,178
Services & Government	\$ 117,629	2,591	\$ 141,703
Total	\$ 261,845	3,812	\$ 231,484

Source: Business Research and Economic Advisors

Table 69 – Total Economic Impacts – Washington – 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 1,959	927	\$ 50,814
Manufacturing	\$ 248,192	2,371	\$ 210,498
Nondurable Goods	\$ 51,144	1,665	\$ 157,040
Durable Goods	\$ 197,048	706	\$ 53,457
Wholesale & Retail Trade	\$ 33,774	1,255	\$ 86,928
Transportation	\$ 382,213	4,374	\$ 283,114
Information Services	\$ 6,661	405	\$ 69,531
Finance, Insurance, Real Estate & Leasing	\$ 19,195	748	\$ 54,531
Services & Government	\$ 387,422	12,670	\$ 589,444
Total	\$ 1,079,415	22,750	\$ 1,344,860

Source: Business Research and Economic Advisors

Table 70 – Total Economic Impacts – West Virginia – 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	8	\$ 669
Manufacturing	\$ 231	14	\$ 1,051
Nondurable Goods	\$ 231	8	\$ 633
Durable Goods	\$ -	6	\$ 418
Wholesale & Retail Trade	\$ -	14	\$ 468
Transportation	\$ 3,731	25	\$ 1,511
Information Services	\$ -	1	\$ 61
Finance, Insurance, Real Estate & Leasing	\$ 2,026	9	\$ 574
Services & Government	\$ 9,194	250	\$ 9,450
Total	\$ 15,182	320	\$ 13,784

Source: Business Research and Economic Advisors

Table 71 – Total Economic Impacts – Wisconsin - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	12	\$ 897
Manufacturing	\$ 8,002	179	\$ 12,188
Nondurable Goods	\$ 5,349	104	\$ 8,114
Durable Goods	\$ 2,653	75	\$ 4,074
Wholesale & Retail Trade	\$ 473	70	\$ 2,666
Transportation	\$ 10,352	65	\$ 4,087
Information Services	\$ 32	5	\$ 379
Finance, Insurance, Real Estate & Leasing	\$ 20,938	82	\$ 5,845
Services & Government	\$ 32,800	846	\$ 32,720
Total	\$ 72,597	1,260	\$ 58,783

Source: Business Research and Economic Advisors

Table 72 – Total Economic Impacts – Wyoming - 2019

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	4	\$ 424
Manufacturing	\$ 110	1	\$ 82
Nondurable Goods	\$ 110	0	\$ 27
Durable Goods	\$ -	1	\$ 55
Wholesale & Retail Trade	\$ 0	2	\$ 94
Transportation	\$ 878	7	\$ 467
Information Services	\$ -	0	\$ 9
Finance, Insurance, Real Estate & Leasing	\$ 570	3	\$ 171
Services & Government	\$ 2,694	44	\$ 1,956
Total	\$ 4,252	61	\$ 3,203

Source: Business Research and Economic Advisors



BREA specializes in custom market analyses for clients throughout the private and public sectors. These unique market analyses integrate economic, financial, and demographic trends with primary market research, proprietary client data, and advanced statistical and modeling techniques. This approach results in comprehensive and actionable analysis, databases and models designed to support planning, sales and marketing and public relations within client organizations.

BREA's principals each have more than 25 years of experience in consulting and forecasting with a wide range of international product and service companies, including consumer products, leisure, retailing, gaming, business services, telecommunications, utility and financial services. Their consulting assignments provide critical analysis and insight into market dynamics, product demand, economic trends, consumer behavior and public policy.

BREA's approach to market analysis focuses on determining market or product characteristics that can be summarized by three attributes: size, share, and growth. Since studies are designed to meet the specific needs of each client, they can incorporate many dimensions of the market and include a variety of ancillary services. To carry out this market analysis, BREA provides the following services:

Market Research: design and implementation of primary market research instruments using telephone, mail and intercept surveys. Test instruments are designed to collect information on product demand, attributes of consumers and users, perceived product attributes and customer satisfaction.

Segmentation Analyses: segmenting demand attributes by product line, consumer demographics (age, income, region, etc.) and business characteristics using market research, government statistics and proprietary databases.

Statistical and Econometric Modeling: developing quantitative models relating market and product demand to key economic factors and demographic market/consumer attributes. Models can be used for forecasting, trend analysis and divergence/convergence analysis.

Market Studies and Trend Analyses: detailed descriptions of markets (defined as products, regions, industries, consumer segments, etc.) and comprehensive analyses of underlying market forces (such as economic and financial conditions, competitive environment, technology, etc.).

Economic Impact Studies: thorough analysis of industries and consumption behavior and their contribution to or impact on national and regional (state, metropolitan areas, counties, etc.) economies.



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