



Contribution of the International Cruise Industry to the U.S Economy in 2018

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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 – 2018.....</i>	<i>8</i>
<i>THE CONTRIBUTION OF THE INTERNATIONAL CRUISE INDUSTRY TO INDIVIDUAL STATE ECONOMIES.....</i>	<i>10</i>
SECTION I: IMPACT OF THE INTERNATIONAL CRUISE INDUSTRY ON THE U.S. ECONOMY IN 2018	
U.S. CRUISE PASSENGERS.....	16
SPENDING IN THE U.S. ECONOMY GENERATED BY THE CRUISE INDUSTRY	20
<i>Direct Economic Impacts in the United States During 2018.....</i>	<i>23</i>
<i>Indirect and Induced Economic Impacts in the United States During 2018</i>	<i>34</i>
<i>Total Economic Impacts in the United States During 2018.....</i>	<i>38</i>
SECTION II: THE CONTRIBUTION OF THE CRUISE INDUSTRY TO THE U.S. ECONOMY BY STATE IN 2018	
SUMMARIES OF THE ECONOMIC IMPACTS OF THE TOP TEN STATES	43
<i>Florida</i>	<i>45</i>
<i>California.....</i>	<i>48</i>
<i>Texas</i>	<i>51</i>
<i>New York.....</i>	<i>53</i>
<i>Alaska.....</i>	<i>55</i>
<i>Washington</i>	<i>57</i>
<i>Georgia</i>	<i>59</i>
<i>Illinois</i>	<i>61</i>
<i>New Jersey</i>	<i>63</i>
<i>Alabama</i>	<i>65</i>
<i>Economic Impacts in the Remaining States</i>	<i>67</i>
APPENDIX I – STATE IMPACT METHODOLOGY	69
APPENDIX II – INDIVIDUAL STATE TABLES.....	73

Executive Summary

The number of passengers sourced¹ from the United States and those embarking from U.S. ports rose from 2016 to 2018. Passengers sourced from the U.S. and including Puerto Rico, totaled 13.09 million, up 14 percent from 11.50 million in 2016. 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 2016 to 2018, from 11.66 million to 12.68 million. 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 spending by the cruise lines and their passengers and crew in the U.S. rose by 10 percent to \$23.95 billion in 2018. This is 33 percent higher than it was in 2010. The \$23.95 billion in total spend once again represented a new peak in cruise industry expenditures in the United States. Overall, the total cruise line expenditures experienced a 9.9 percent increase from 2016. The \$17.61 billion in expenditures by the cruise lines for goods and services, and capital expenditures, accounted for 74 percent of the direct spending, unchanged from 2016. Cruise lines' direct expenditures for wages for U.S. employees and taxes paid to U.S. federal, state and local tax jurisdictions increased by nearly 13 percent to \$1.67 billion, accounting for 7.0 percent of total direct expenditures.

The \$4.67 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 12 percent, in part driven by the robust growth in passenger embarkations from U.S. ports. Since 2010, total passenger and crew spending has increased by 37 percent, which has helped drive the total economic impact up about 39 percent from \$37.85 billion to \$52.67 billion during this timeframe.

Table ES-1 – Expenditures of the International Cruise Industry in the United States, 2012 – 2018¹

	2010	2012	2014	2016	2018	Change from Prior Period			
						2012	2014	2016	2018
Passengers (Millions)									
Passengers Sourced from the U.S.	10.09	10.67	11.33	11.50	13.09	5.8%	6.1%	1.5%	13.8%
U.S. Embarkations	9.69	10.09	11.06	11.66	12.68	4.1%	9.6%	5.4%	8.8%
Industry Spending in U.S. (\$ Billions)									
Cruise Lines	\$ 13.40	\$ 14.63	\$ 15.63	\$ 16.02	\$ 17.61	9.2%	6.9%	2.5%	9.9%
Goods and Services	\$ 11.54	\$ 12.66	\$ 13.65	\$ 13.96	\$ 15.34	9.7%	7.8%	2.2%	9.9%
Capital Expenditures (incl. net interest)	\$ 1.86	\$ 1.97	\$ 1.98	\$ 2.06	\$ 2.27	6.0%	0.7%	3.8%	10.2%
Passengers and Crew	\$ 3.41	\$ 3.66	\$ 3.96	\$ 4.18	\$ 4.67	7.4%	8.1%	5.8%	11.7%
Wages & Taxes Paid by Cruise Lines	\$ 1.20	\$ 1.34	\$ 1.43	\$ 1.48	\$ 1.67	12.1%	6.4%	3.9%	12.8%
Total U.S.-based Spending	\$ 18.01	\$ 19.63	\$ 21.02	\$ 21.69	\$ 23.95	9.0%	7.1%	3.2%	10.4%

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

As indicated in **Table ES-2**, the growth in the economic benefits increased in tandem with the growth of passengers sourced from the U.S. After increasing by 3.2 percent in 2016, direct cruise industry expenditures in the U.S. rose by over 10 percent from 2016 to 2018. The direct cruise industry expenditures in the U.S. rose to a new peak of \$23.95 billion.

Table ES-2 – Economic Contribution of the International Cruise Industry, 2012 – 2018

	2010	2012	2014	2016	2018	Change from Previous Period			
						2012	2014	2016	2018
Passengers Sourced from the U.S.	10.09	10.67	11.33	11.50	13.09	5.8%	6.1%	1.5%	10.3%
Direct Economic Impacts									
Direct Cruise Industry Expenditures (\$ Billions)*	\$ 18.01	\$ 19.63	\$ 21.02	\$ 21.69	\$ 23.95	9.0%	7.1%	3.2%	10.4%
Employment	140,359	146,785	152,272	158,226	172,326	4.6%	3.7%	3.9%	8.9%
Wages and Salaries (\$ Billions)	\$ 5.84	\$ 6.39	\$ 7.02	\$ 7.38	\$ 8.32	9.5%	9.8%	5.2%	12.7%
Total Economic Impacts									
Total Output (\$ Billions)	\$ 37.85	\$ 42.27	\$ 46.09	\$ 47.76	\$ 52.67	11.7%	9.1%	3.6%	10.3%
Employment	329,943	356,311	373,738	389,432	421,711	8.0%	4.9%	4.2%	8.3%
Wages and Salaries (\$ Billions)	\$ 15.24	\$ 17.42	\$ 19.43	\$ 20.57	\$ 23.15	14.3%	11.5%	5.9%	12.5%

* 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 \$23.95 billion in direct cruise industry expenditures generated an estimated 172,326 direct jobs throughout the U.S. economy paying \$8.32 billion in wages and salaries during 2018, both records for the cruise industry within the U.S. economy. Driven by the 10 percent increase in

direct expenditures, the employment impact rose by 8.9 percent while the income impact rose by nearly 13 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 64 percent of the total direct wage income impacts. Led by direct employment by the cruise lines and other impacts in the transportation sector, businesses in the core cruise travel sector benefitted from more than 124,000 jobs paying \$5.3 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 48,146 jobs paying \$3.0 billion in wages and salaries during 2018.

Table ES-3 –Direct Economic Contribution of the International Cruise Industry in 2018

Sector	Direct Spending \$ Millions	Direct Employment	Direct Wage Income \$ Millions
Core Cruise Travel Sector	\$ 12,212	124,180	\$ 5,300
Passenger & Crew Spending	\$ 2,395	28,271	\$ 746
Port Services & Cruise Lines	\$ 4,169	54,817	\$ 2,528
Transportation Services	\$ 3,315	29,169	\$ 1,412
Air Transportation	\$ 2,333	11,923	\$ 614
Cruise Industry Suppliers	\$ 11,743	48,146	\$ 3,023
Agriculture, Mining, Utilities & Construction	\$ 48	206	\$ 7
Manufacturing	\$ 5,826	13,088	\$ 901
Food & Beverages	\$ 1,077	2,277	\$ 106
Apparel & Textiles	\$ 163	913	\$ 43
Chemicals & Plastics	\$ 316	384	\$ 39
Petroleum Refining	\$ 1,757	141	\$ 20
Fabricated Metal Products	\$ 269	985	\$ 68
Industrial Machinery	\$ 513	1,453	\$ 100
Ship Maintenance & Repair	\$ 827	2,252	\$ 181
Computers & Electronic Equipment	\$ 298	865	\$ 94
Other Manufacturing	\$ 606	3,818	\$ 252
Wholesale Trade	\$ 704	3,202	\$ 232
Other Transportation Services	\$ 29	47	\$ 5
Information Services	\$ 291	573	\$ 52
Finance, Insurance, Real Estate & Leasing	\$ 1,194	3,015	\$ 286
Services & Government (ex. Lodging & Travel Service)	\$ 3,651	28,015	\$ 1,539
Professional, Scientific & Technical Services	\$ 2,104	16,111	\$ 796
Administrative & Waste Management Services	\$ 50	226	\$ 15
Arts, Entertainment & Recreation	\$ 235	1,843	\$ 98
Other Services & Government	\$ 1,262	9,835	\$ 631
Total - 2018	\$ 23,955	172,326	\$ 8,323
Total - 2016	\$ 21,686	158,226	\$ 7,383
Percentage Change from 2016	10.5%	8.9%	12.7%

Source: Business Research & Economic Advisors.

The total economic impacts of the international cruise industry 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 \$52.67 billion in total output throughout the U.S. economy. The production of these goods and services generated 421,711 total jobs paying \$23.15 billion in wages and salaries. The total output impact rose by 10

percent from 2016 to 2018 while the employment and income impacts rose by 8.3 percent and 13 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 \$18.9 billion in output generating 236,107 jobs paying \$11.72 billion in wages and salaries. The services and government sector accounted for approximately 36 percent of the national output impacts, 56 percent of the total employment impacts and 51 percent of the total income impacts.

Table ES-4 –Total Economic Contribution of the International Cruise Industry in 2018

Sector	Total Output \$ Millions	Total Employment	Total Wage Income \$ Millions
Agriculture, Mining, Utilities & Construction	\$ 5,233	7,342	\$ 622
Manufacturing	\$ 11,481	34,430	\$ 2,507
Food & Beverages	\$ 921	3,426	\$ 229
Apparel & Textiles	\$ 1,265	1,912	\$ 135
Paper and Printing	\$ 342	1,693	\$ 128
Chemicals & Plastics	\$ 507	4,556	\$ 227
Petroleum Refining	\$ 1,064	779	\$ 99
Fabricated Metal Products	\$ 739	4,413	\$ 329
Industrial Machinery	\$ 749	1,636	\$ 251
Transportation Equipment	\$ 1,269	2,510	\$ 288
Computers & Electronic Equipment	\$ 3,387	3,033	\$ 554
Other Manufacturing	\$ 1,238	10,472	\$ 268
Wholesale & Retail Trade	\$ 3,265	37,427	\$ 2,007
Transportation	\$ 8,163	84,283	\$ 4,096
Information Services	\$ 1,002	3,953	\$ 402
Finance, Insurance, Real Estate & Leasing	\$ 4,630	18,169	\$ 1,796
Services & Government	\$ 18,897	236,107	\$ 11,720
Professional, Scientific & Technical Services	\$ 5,967	40,061	\$ 3,129
Administrative & Waste Management Services	\$ 4,472	64,813	\$ 1,909
Accommodations & Food Services	\$ 2,268	50,595	\$ 1,195
Performing Arts & Amusements	\$ 984	17,543	\$ 449
Other Services & Government	\$ 5,207	63,095	\$ 5,025
Total - 2018	\$ 52,672	421,711	\$ 23,151
Total - 2016	\$ 47,758	389,432	\$ 20,575
Percentage Change from 2016	10.3%	8.3%	12.5%

Source: Business Research & Economic Advisors.

The manufacturing sector, with \$11.48 billion in output generated by cruise industry expenditures, accounted for 22 percent of the total output impact. The 34,430 manufacturing jobs accounted for 8.2 percent of the total employment, and the \$2.51 billion in wages comprise nearly 11 percent of the total wage income impacts.

The transportation sector, which includes cruise lines and ports, benefited from \$8.16 billion in output, 84,283 jobs and \$4.10 billion in wages and salaries. As in 2016, this sector once again accounted for nearly 16 percent of the total economic impacts of the cruise industry in the U.S.

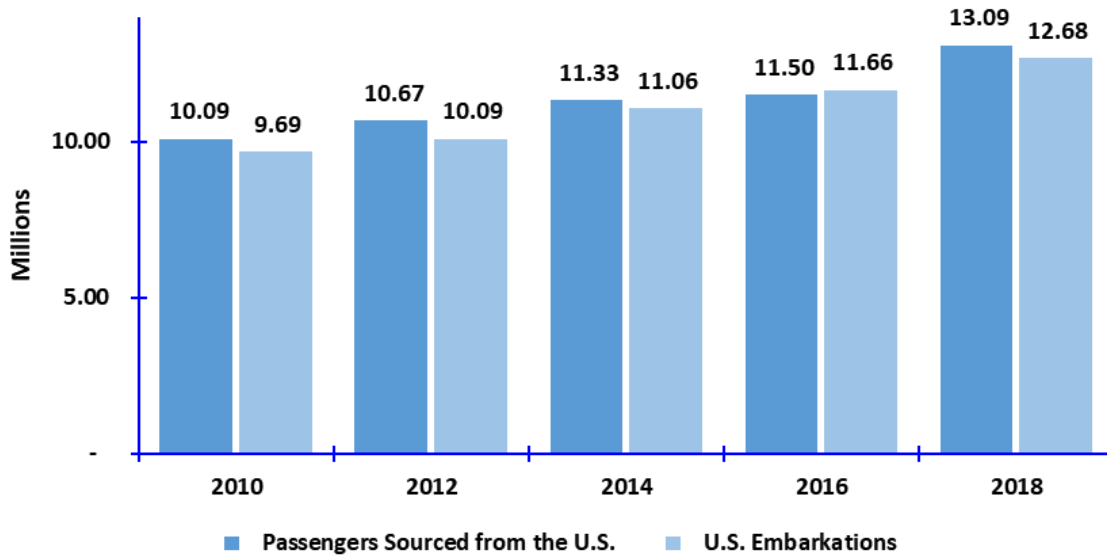
The following are the major conclusions of the analysis of the cruise industry economic operations and impacts in the U.S. during 2018:

- An estimated 13.09 million cruise passengers were sourced from the U.S.
- A total of 12.68 million cruise passengers embarked on their cruises from U.S. ports during 2018. Florida, whose ports handled 7.51 million embarkations, accounted for about 59 percent of all U.S. cruise embarkations.
- The cruise lines and their passengers and crew directly spent \$23.95 billion on goods and services in the U.S., a 10 percent increase from 2016. The cruise lines spent \$19.28 billion while passengers and crew spent \$4.67 billion.
- Within the U.S., spending by the cruise lines with their direct suppliers was up from \$11.17 billion in 2016 to \$11.74 billion in 2018.
- The cruise industry generated the direct employment of an estimated 172,326 workers with U.S. businesses, who, in return, received \$8.32 billion in wages and salaries during 2018.
- Including the indirect and induced economic impacts, the spending of the cruise lines and their crew and passengers was responsible for the generation of \$52.67 billion in total output in the U.S., a 10 percent increase from 2016.
- Including the indirect and induced economic impacts, the spending of the cruise lines and their crew and passengers in 2018 was responsible for the generation of 421,711 total jobs throughout the country. This represents a 8.3 percent increase over 2016.
- Total wages and salaries paid to these workers was \$23.15 billion, an increase of 13 percent over 2016.

Trends: 2010 – 2018

In 2018, 13.09 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 3.3 percent over the 2010-2018 timeframe. Each two-year period experienced a new high in U.S.-sourced passengers throughout this timeframe.

Figure ES-1 – U.S. Cruise Passenger Statistics, 2010 – 2018



Source: CLIA and BREA

Embarkations from U.S. ports increased from 2010 to 2018 with an annual average of 3.4 percent, including an increase of 8.8 percent increase from 2016 to 2018.

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 2010, U.S. businesses received an estimated \$18.01 billion in direct cruise expenditures (see **Table ES-5**). By 2018, these direct expenditures had increased by 33 percent to \$23.95 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 2010, these direct expenditures have increased at an average annual rate of 3.6 percent.

Table ES-5 – Direct Cruise Industry Expenditures in the United States, 2010 – 2018

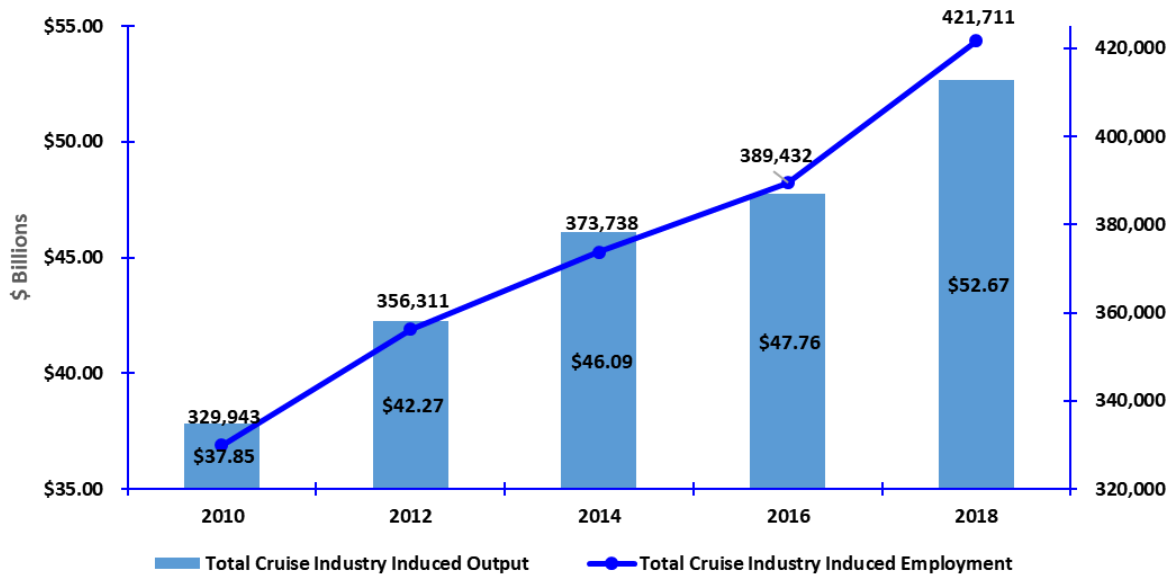
	2010	2012	2014	2016	2018	Change from Previous Period			
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Total Economic Impacts									
Total Output (\$ Billions)	\$ 37.85	\$ 42.27	\$ 46.09	\$ 47.76	\$ 52.67	11.7%	9.1%	3.6%	10.3%
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Wages and Salaries (\$ Billions)	\$ 15.24	\$ 17.42	\$ 19.43	\$ 20.57	\$ 23.15	14.3%	11.5%	5.9%	12.5%

Source: Business Research & Economic Advisors

As the direct expenditures of the international cruise industry with U.S. businesses have grown since 2010, 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 2010, the total economic impact of the cruise industry has increased each year, growing from \$37.85 billion in 2010 to \$52.67 billion in 2018 (see **Table ES-5**). Over this timeframe, the total output that has resulted from cruise-related spending in the U.S. has increased by 39 percent, or at an average annual rate of 4.2 percent.¹

Also shown in **Figure ES-5**, the total employment impact of the international cruise industry has followed a similar pattern, increasing from 329,943 jobs in 2010 to 421,711 jobs by 2018. The total employment impact of cruise industry expenditures in the U.S. has increased by 28 percent since 2010, or 3.1 percent per year.

¹ These figures are not adjusted for inflation.

Figure ES-2 – Total Economic Impact of the International Cruise Industry, 2010 – 2018

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**, 12.68 million cruise passengers embarked on their cruises from U.S. ports in 2018. The top 10 U.S. cruise ports accounted for 87 percent of 2018 embarkations, unchanged from 2016.

Florida remains the center of cruising in the U.S., accounting for over 59 percent of all U.S. embarkations. Passenger embarkations from Florida increased by 6.1 percent from 2016 to 2018 to 7.51 million. Miami continues to lead the Florida ports with 2.77 million embarkations

in 2018. Port Canaveral continues as the second largest U.S. port with 2.09 million embarkations. Since 2010, Florida ports have experienced a combined 30 percent increase in passenger embarkations.

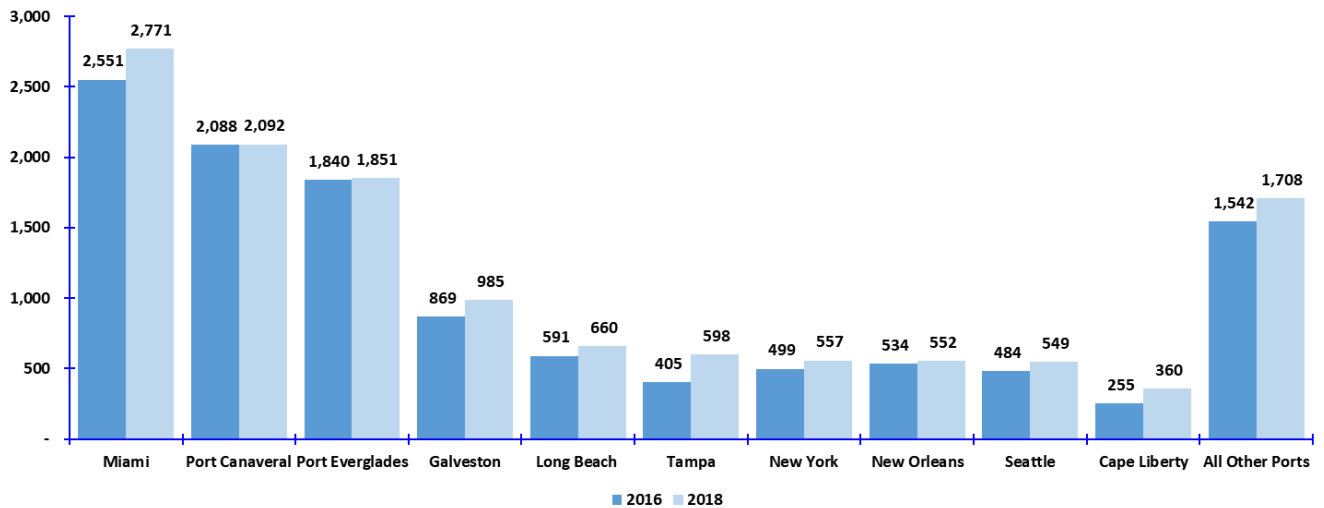
Table ES-6 – U.S. Embarkations by Top 10 Ports, 2010 – 2018

Port	2010	2012	2014	2016	2018	Growth Over Prior Period			
						2012	2014	2016	2018
Miami	2,166,000	1,887,000	2,549,000	2,551,000	2,771,000	-12.9%	35.1%	0.1%	8.6%
Port Canaveral	1,289,000	1,708,000	1,769,000	2,088,000	2,092,000	32.5%	3.6%	18.0%	0.2%
Port Everglades	1,758,000	1,797,000	1,940,000	1,840,000	1,851,000	2.2%	8.0%	18.0%	0.2%
Galveston	435,000	604,000	642,000	869,000	985,000	38.9%	6.3%	35.4%	13.3%
Long Beach	414,000	457,000	549,000	591,000	660,000	10.4%	20.1%	7.7%	11.7%
Tampa	397,000	487,000	451,000	405,000	598,000	22.7%	-7.4%	-10.2%	47.7%
New York	553,000	586,000	576,000	499,000	557,000	6.0%	-1.7%	-13.4%	11.6%
New Orleans	260,000	488,000	502,000	534,000	552,000	87.7%	2.9%	6.4%	3.4%
Seattle	466,000	464,000	408,000	484,000	549,000	-0.4%	-12.1%	18.6%	13.4%
Cape Liberty	196,400	238,700	224,100	254,700	360,000	21.5%	-6.1%	13.7%	41.3%
All Other Ports	1,759,600	1,378,300	1,453,900	1,542,300	1,708,000	-21.7%	5.5%	6.1%	10.7%
United States	9,694,000	10,095,000	11,064,000	11,658,000	12,683,000	4.1%	9.6%	5.4%	8.8%
Top 10 Ports	7,934,400	8,716,700	9,610,100	10,115,700	10,975,000	9.9%	10.2%	5.3%	8.5%
Share of the U.S.	81.8%	86.3%	86.9%	86.8%	86.5%				
Florida Ports	5,784,000	6,074,000	6,891,000	7,079,000	7,512,000	5.0%	13.5%	2.7%	6.1%
Share of the U.S.	59.7%	60.2%	62.3%	60.7%	59.2%				

Source: U.S. Cruise Ports and BREA

Embarkations from California's ports (Los Angeles, Long Beach, San Diego and San Francisco) have increased by 5.6 percent since 2016 to 1.12 million. While two of California's ports saw decreases in embarkations (Los Angeles and San Francisco), the increases in Long Beach and San Diego drove the overall increase across the state.

There were also significant developments among the other key ports. Embarkations from Galveston jumped 13 percent to 985,163, while New Jersey's Cape Liberty saw its embarkations increase to 360,000. Seattle's embarkations continue to increase, improving by just over 13 percent from 2016 to 548,691, a new high. Seattle's increase is also interrelated with the increase in passenger visits and crew arrivals to Alaska. Since 2016, New York's Manhattan and Brooklyn cruise terminals experienced a 12 percent increase in embarkations to 556,937.

Figure ES-3– U.S. Embarkations by Top 10 Port, 2016 and 2018 (Thousands)

Source: U.S. Cruise Ports

The major economic impacts of the international cruise industry by state during 2018 as shown in **Table ES-7** were as follows:

- The economic impacts were concentrated in 10 states. These states accounted for 76 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 12.42 million in 2018. Florida ports accounted for 46 percent of all passenger visits and crew arrivals in the U.S during 2018. Passengers, crew and cruise lines combined to directly spend \$8.49 billion in Florida, up 6.4 percent over 2016. Florida accounted for 35 percent of the industry's direct expenditures. This direct spending generated 154,646 total jobs paying \$7.69 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 59 percent of the cruise lines' U.S.-based employment, and 68 percent of the cruise lines' U.S.-based wages during 2018.
- California, similar to Florida, hosts both cruise line headquarters and ports-of-embarkation. California ports continue to add passengers and crew. During 2018, cruise passenger visits and crew arrivals totaled 2.16 million (**Table 12**). Overall, passenger visits and crew arrivals were up 2.1 percent in 2018 over 2016. With just over 10 percent of the industry's direct expenditures, California businesses received \$2.50 billion in direct industry spending, which, in turn, generated 49,369 jobs paying \$3.26 billion in wage income.

Table ES-7 – Direct Expenditures and Total Employment and Wage Impacts of the International Cruise Industry for All States, 2018

State	2018	2016	Direct Purchases (\$ Millions)	Share of the U.S.	Total Employment	Share of the U.S.	Total Income (\$ Millions)	Share of the U.S.	Average Annual Wage (\$1,000)
Florida	1	1	\$ 8,485	35.4%	154,646	36.7%	\$ 7,689	33.2%	\$ 46.5
California	2	2	\$ 2,501	10.4%	49,369	11.7%	\$ 3,260	14.1%	\$ 59.2
Texas	3	3	\$ 1,511	6.3%	26,241	6.2%	\$ 1,749	7.6%	\$ 57.2
New York	4	4	\$ 1,295	5.4%	17,240	4.1%	\$ 1,123	4.9%	\$ 58.6
Alaska	5	5	\$ 1,242	5.2%	22,447	5.3%	\$ 1,156	5.0%	\$ 45.7
Washington	6	6	\$ 837	3.5%	19,189	4.6%	\$ 1,082	4.7%	\$ 51.3
Georgia	7	7	\$ 752	3.1%	13,802	3.3%	\$ 761	3.3%	\$ 51.3
Illinois	8	8	\$ 590	2.5%	8,761	2.1%	\$ 555	2.4%	\$ 58.6
New Jersey	9	10	\$ 530	2.2%	9,649	2.3%	\$ 584	2.5%	\$ 56.7
Louisiana	10	11	\$ 477	2.0%	8,966	2.1%	\$ 386	1.7%	\$ 39.7
Pennsylvania	11	12	\$ 450	1.9%	7,086	1.7%	\$ 420	1.8%	\$ 55.7
Hawaii	12	14	\$ 445	1.9%	6,732	1.6%	\$ 246	1.1%	\$ 35.4
Colorado	13	13	\$ 410	1.7%	2,727	0.6%	\$ 172	0.7%	\$ 57.2
Massachusetts	14	9	\$ 393	1.6%	6,031	1.4%	\$ 428	1.8%	\$ 61.3
Indiana	15	15	\$ 354	1.5%	8,304	2.0%	\$ 429	1.9%	\$ 48.5
North Carolina	16	16	\$ 307	1.3%	4,387	1.0%	\$ 213	0.9%	\$ 46.7
Michigan	17	17	\$ 291	1.2%	3,679	0.9%	\$ 217	0.9%	\$ 55.7
Maryland	18	19	\$ 260	1.1%	4,471	1.1%	\$ 253	1.1%	\$ 53.6
Arizona	19	18	\$ 247	1.0%	4,088	1.0%	\$ 187	0.8%	\$ 43.5
Ohio	20	20	\$ 244	1.0%	4,569	1.1%	\$ 231	1.0%	\$ 47.5
Virginia	21	22	\$ 238	1.0%	3,563	0.8%	\$ 217	0.9%	\$ 57.1
Connecticut	22	21	\$ 206	0.9%	1,585	0.4%	\$ 135	0.6%	\$ 76.3
Oregon	23	24	\$ 196	0.8%	5,151	1.2%	\$ 252	1.1%	\$ 45.5
Alabama	24	28	\$ 185	0.8%	2,869	0.7%	\$ 135	0.6%	\$ 43.3
Missouri	25	23	\$ 172	0.7%	3,752	0.9%	\$ 197	0.9%	\$ 48.1
South Carolina	26	25	\$ 170	0.7%	3,375	0.8%	\$ 136	0.6%	\$ 37.7
Minnesota	27	26	\$ 133	0.6%	2,364	0.6%	\$ 144	0.6%	\$ 57.1
Tennessee	28	29	\$ 115	0.5%	1,925	0.5%	\$ 92	0.4%	\$ 44.4
Nevada	29	27	\$ 108	0.5%	1,491	0.4%	\$ 72	0.3%	\$ 44.4
Wisconsin	30	32	\$ 74	0.3%	1,175	0.3%	\$ 55	0.2%	\$ 44.6
Maine	31	33	\$ 73	0.3%	1,077	0.3%	\$ 39	0.2%	\$ 34.1
Kentucky	32	30	\$ 70	0.3%	1,545	0.4%	\$ 70	0.3%	\$ 41.9
Kansas	33	34	\$ 62	0.3%	1,875	0.4%	\$ 90	0.4%	\$ 44.2
Utah	34	36	\$ 59	0.2%	1,290	0.3%	\$ 56	0.2%	\$ 40.0
Oklahoma	35	39	\$ 53	0.2%	1,000	0.2%	\$ 45	0.2%	\$ 42.5
Dist. of Columbia	36	35	\$ 52	0.2%	319	0.1%	\$ 47	0.2%	\$ 129.0
Mississippi	37	38	\$ 50	0.2%	695	0.2%	\$ 27	0.1%	\$ 37.1
Iowa	38	37	\$ 49	0.2%	429	0.1%	\$ 19	0.1%	\$ 41.7
Arkansas	39	40	\$ 39	0.2%	687	0.2%	\$ 26	0.1%	\$ 35.1
New Hampshire	40	31	\$ 36	0.2%	387	0.1%	\$ 23	0.1%	\$ 51.7
Delaware	41	41	\$ 35	0.1%	279	0.1%	\$ 17	0.1%	\$ 54.8
Nebraska	42	42	\$ 30	0.1%	552	0.1%	\$ 27	0.1%	\$ 43.8
Rhode Island	43	43	\$ 30	0.1%	426	0.1%	\$ 19	0.1%	\$ 40.9
New Mexico	44	44	\$ 21	0.1%	301	0.1%	\$ 15	0.1%	\$ 45.4
Idaho	45	45	\$ 19	0.1%	327	0.1%	\$ 14	0.1%	\$ 40.5
West Virginia	46	47	\$ 15	0.1%	292	0.1%	\$ 12	0.1%	\$ 37.4
Vermont	47	46	\$ 15	0.1%	99	0.0%	\$ 6	0.0%	\$ 48.6
North Dakota	48	48	\$ 10	0.0%	196	0.0%	\$ 7	0.0%	\$ 34.8
Montana	49	50	\$ 8	0.0%	130	0.0%	\$ 6	0.0%	\$ 36.4
South Dakota	50	49	\$ 8	0.0%	113	0.0%	\$ 4	0.0%	\$ 35.9
Wyoming	51	51	\$ 4	0.0%	58	0.0%	\$ 3	0.0%	\$ 43.4
U. S. Total			\$ 23,955		421,711		\$ 23,151		\$ 54.9

Source: Business Research and Economic Advisors

- An estimated 1.50 million passengers and crew visited Texas during 2018, up 18 percent from 1.28 million in 2016 (see **Table 13**). This represents 5.6 percent of all passenger visits and crew arrivals at U.S. ports. With \$1.51 billion in direct spending and 26,241 jobs paying \$1.75 billion in income, Texas accounted for 6.3 percent of the industry's direct expenditures, 6.2 percent of the industry's total employment impact and 7.6 percent of the income impact.
- In 2018, an estimated 845,000 passengers and crew visited New York (**Table 14**), 3.1 percent of total passenger visits and crew arrivals in the U.S. This represents a 12 percent increase from 2016. New York accounted for 5.4 percent of the industry's direct expenditures with \$1.30 billion in 2018. This spending generated an estimated 17,240 jobs paying \$1.12 billion in income.
- Alaska benefits from the cruise industry primarily as a destination market. During 2018, the cruise industry produced 5.65 million passenger visits and crew arrivals to Alaska destinations (see **Table 15**), a 15 percent increase from 2016. 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 5.2 percent of the industry's direct spending with \$1.24 billion in expenditures generating 22,447 full- and part-time jobs paying about \$1.16 billion in wage income.
- The state of Washington is the location of cruise industry administrative facilities and a port-of-embarkation in Seattle. During 2018 an estimated 806,000 passengers and crew visited Seattle (see **Table 16**). With \$837 million in direct spending and 19,189 jobs paying \$1.08 billion in income, Washington accounted for approximately 3.5 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 2018, 574,361 residents of Georgia cruised. This represented 4.4 percent of U.S. sourced passengers. As a result of the activity of the cruise industry, Georgia businesses received \$752 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 13,802 jobs and \$761 million in wages and salaries throughout the Georgia economy during 2018.
- 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 325,000 during 2018 and accounted for 2.5 percent of U.S. resident passengers. As a result of the activity of the cruise industry, Illinois businesses received \$590 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 8,761 jobs and \$555 million in income throughout the Illinois economy during 2018.
- In 2018, an estimated 513,000 passengers and crew visited New Jersey (see **Table 20**). This represents 1.9 percent of total passenger visits and crew arrivals in the U.S. and a 41 percent increase from 2016. New Jersey accounted for 2.2 percent of the industry's

direct expenditures with \$530 million. This spending generated an estimated 9,649 jobs paying \$584 million in income.

- Louisiana cracked into the top 10 in 2018. An estimated 794,000 passengers and crew visited the Port of New Orleans during 2018, up about 3.4 percent from 2016. Louisiana accounted for \$477 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 \$386 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 2018

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 9.69 million in 2010 to 12.68 million in 2018, a 31 percent increase. As was seen in previous years, there was significant variation in growth among the cruise ports within the United States. Passenger embarkations in Florida increased 6.1 percent to 7.51 million from 2016 to 2018, driven by the growth seen in Miami and Tampa. Since 2010, passenger embarkations in Florida have increased nearly 30 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 – 2018

Port	2010	2012	2014	2016	2018	Growth			
						2012	2014	2016	2018
Florida	5,784,000	6,074,000	6,891,000	7,079,000	7,512,000	5.0%	13.5%	2.7%	6.1%
Miami	2,166,000	1,887,000	2,549,000	2,551,000	2,771,000	-12.9%	35.1%	0.1%	8.6%
Port Canaveral	1,289,000	1,708,000	1,769,000	2,088,000	2,092,000	32.5%	3.6%	18.0%	0.2%
Port Everglades	1,758,000	1,797,000	1,940,000	1,840,000	1,851,000	2.2%	8.0%	-5.2%	0.6%
Tampa	397,000	487,000	451,000	405,000	598,000	22.7%	-7.4%	-10.2%	47.7%
Jacksonville	174,000	195,000	182,000	195,000	200,000	12.1%	-6.7%	7.1%	2.6%
California	1,064,000	837,000	984,000	1,058,000	1,117,000	-21.3%	17.6%	7.5%	5.6%
Long Beach	414,000	457,000	549,000	591,000	660,000	10.4%	20.1%	7.7%	11.7%
Los Angeles	366,000	213,000	291,000	300,000	247,000	-41.8%	36.6%	3.1%	-17.7%
San Diego	243,000	105,000	49,000	55,000	107,000	-56.8%	-53.3%	12.2%	94.5%
San Francisco	41,000	62,000	95,000	112,000	103,000	51.2%	53.2%	17.9%	-8.0%
New York	553,000	586,000	576,000	499,000	557,000	6.0%	-1.7%	-13.4%	11.6%
Other U.S. Ports	2,293,000	2,598,000	2,613,000	3,022,000	3,497,000	13.3%	0.6%	15.7%	15.7%
Galveston	435,000	604,000	642,000	869,000	985,000	38.9%	6.3%	35.4%	13.3%
New Orleans	260,000	488,000	502,000	534,000	552,000	87.7%	2.9%	6.4%	3.4%
Seattle	466,000	464,000	408,000	484,000	549,000	-0.4%	-12.1%	18.6%	13.4%
Baltimore	208,000	241,000	199,000	211,000	219,000	15.9%	-17.4%	6.0%	3.8%
Remaining U.S. Ports	924,000	801,000	862,000	924,000	1,192,000	-13.3%	7.6%	7.2%	29.0%
United States	9,694,000	10,095,000	11,064,000	11,658,000	12,683,000	4.1%	9.6%	5.4%	8.8%

Source: Port Authorities and Business Research and Economic Advisors

Miami leads the Florida ports with 2.77 million embarkations, which is up by 8.6 percent from 2016. 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. Additionally, as predicted in the 2016 report, new departures to Cuba to also helped fuel the increase in Miami's departures.

With nearly 2.1 million embarkations, Port Canaveral continued its hold as the second largest US port. After a decrease in embarkations from 2014 to 2016, Tampa saw its embarkations jump by nearly 48 percent from 2016, to 598,000. Tampa is now the 6th largest port of embarkation in the U.S.

Jacksonville, which homeports the *Carnival Ecstasy*, saw embarkations increase by 2.6 percent during 2018 reaching 200,000 passengers.

Passenger embarkations in California's four cruise ports (Los Angeles, Long Beach, San Diego, and San Francisco) increased by 5.6 percent to 1.12 million passengers during 2018. This was the third consecutive year of increased embarkations following five consecutive years of declines.

Passenger embarkations in Long Beach continued to rise in 2018; up nearly 12 percent to 660,000 passengers. The Port of Los Angeles, the second largest of California's cruise ports saw its embarkations decrease to just under 250,000 passengers in 2018. San Diego experienced a large increase in embarkations to 107,000, making it the third most popular California cruise port. Finally, embarkations at San Francisco decreased by 8 percent from 2016 to 103,000 passengers.

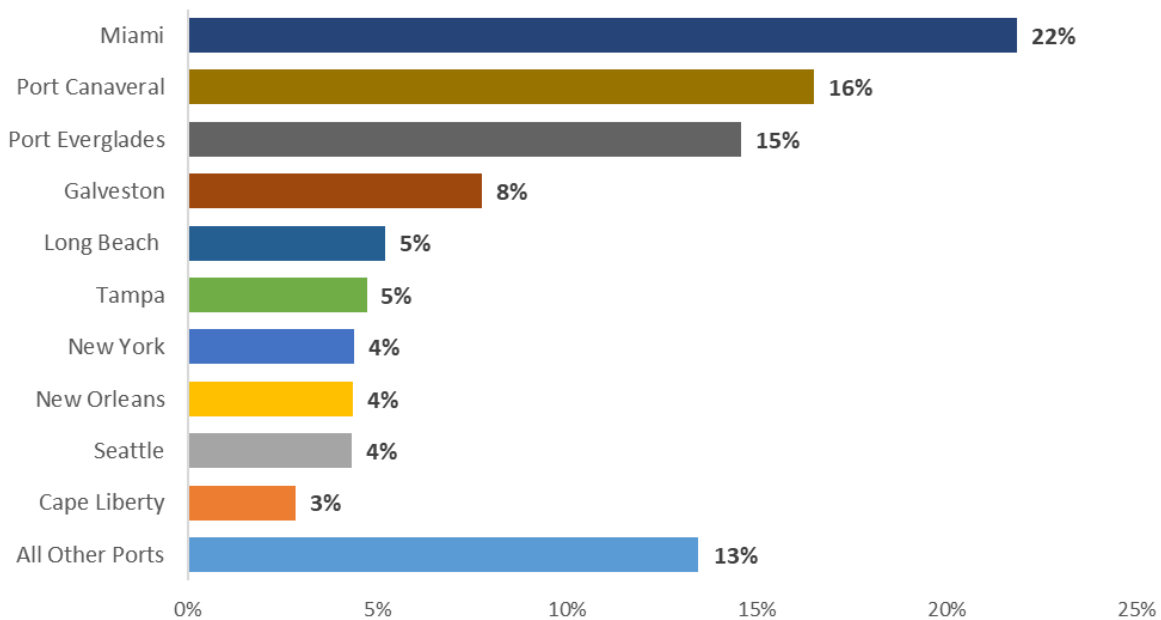
Combined the nine cruise ports of Florida and California account for 68 percent of the U.S. embarkations in 2018; down from 70 percent in the 2016 study. Despite this, the total embarkations across Florida and California increased by 6 percent over 2016 and accounts for 48 percent of the total net increase in embarkations among all U.S. cruise ports.

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. In New York, embarkations at its two cruise terminals in Manhattan and Brooklyn increased by 12.0 percent to 557,000 passengers during 2018. This followed a 13 percent decrease from 2014 to 2016.

After experiencing a 35 percent growth in 2016, in part due to the closure of the Port of Houston, embarkations at Galveston continue to climb, up 13 percent from 2016 to 2018 to 985,000. New Orleans also saw its embarkations climb, up from 534,000 in 2016 to 552,000 in 2018.

For the second consecutive period, embarkations in Seattle increased by double digits, up 13 percent in 2018 to 549,000. **Figure 1** shows the distribution of US embarkations for the Top 10 ports and all others.

Figure 1 - Distribution of U.S. Embarkations – 2018



Source: Port Authorities and Business Research and Economic Advisors

As shown in **Table 2**, 13.1 million cruise passengers were sourced from the United States including Puerto Rico. This represented a 14 percent increase from 2016.

A total of 4.21 million passengers were sourced from the states of the South Atlantic region. This represents about 32 percent of the total. The Pacific region, with 1.85 million passengers, is second, with about 14 percent of the U.S. total. With a total of more than 6 million cruise passengers, these two regions accounted for 46 percent of all cruise passengers sourced from the United States, down from 52 percent in 2016.

The next two largest regions, the West South Central and Middle Atlantic regions, each generated more than 1.5 million sourced passengers. Combined, the two accounted for a total of 3.16 million cruise passengers, representing 24 percent of all passengers sourced from the United States

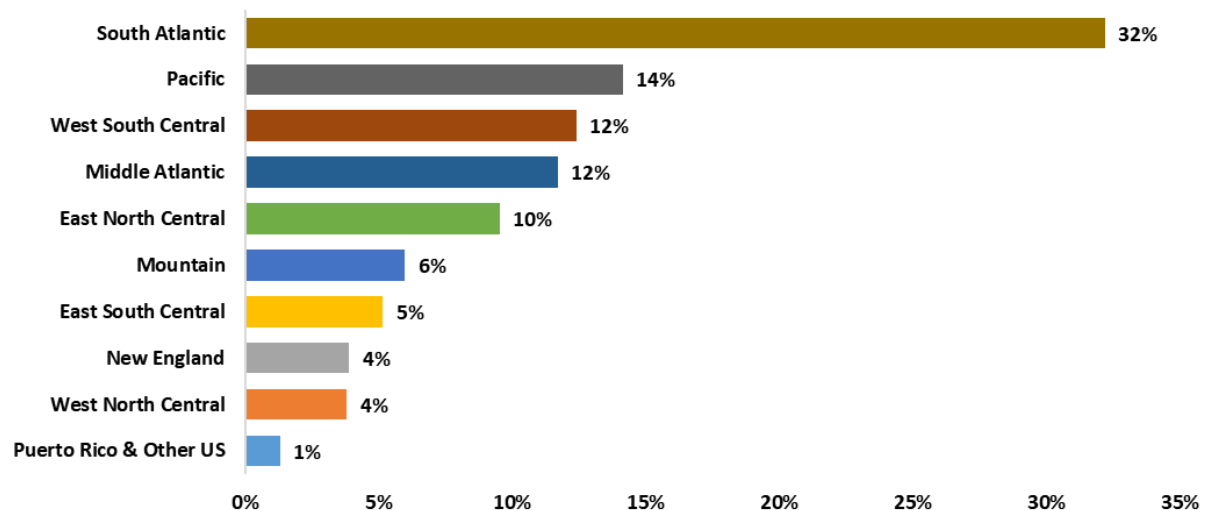
Table 2 –Cruise Passengers Sourced from the United States, 2010 – 2018²

Census Divisions	Passengers					Share of the U.S.				
	2010	2012	2014	2016	2018	2010	2012	2014	2016	2018
South Atlantic	3,693,200	3,991,000	4,503,540	4,236,127	4,213,572	36.6%	37.4%	39.8%	36.8%	32.2%
Pacific	1,333,500	1,426,900	1,623,705	1,730,795	1,849,352	13.2%	13.4%	14.3%	15.0%	14.1%
West South Central	1,308,000	1,425,600	1,471,633	1,419,082	1,624,426	13.0%	13.4%	13.0%	12.3%	12.4%
Middle Atlantic	849,000	852,600	785,388	1,065,486	1,530,796	8.4%	8.0%	6.9%	9.3%	11.7%
East North Central	608,900	563,000	528,609	821,669	1,246,778	6.0%	5.3%	4.7%	7.1%	9.5%
Mountain	904,400	930,000	992,535	626,524	783,521	9.0%	8.7%	8.8%	5.4%	6.0%
East South Central	262,800	256,500	252,147	447,592	672,650	2.6%	2.4%	2.2%	3.9%	5.1%
New England	795,700	887,300	836,984	604,759	507,951	7.9%	8.3%	7.4%	5.3%	3.9%
West North Central	260,300	270,800	252,987	331,471	496,590	2.6%	2.5%	2.2%	2.9%	3.8%
Puerto Rico & Other US	74,500	71,200	80,179	219,848	169,108	0.7%	0.7%	0.7%	1.9%	1.3%
United States	10,090,300	10,674,900	11,327,707	11,503,353	13,094,744	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Cruise Lines International Association

Figure 2 shows the distribution of US sourced passengers for the 10 regions.

Figure 2 – Distribution of Cruise Passengers Sourced from the United States – 2018



² 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, District of Columbia, 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.

Source: Cruise Lines International Association

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, 13.1 million versus 12.7 million, thus, U.S. resident cruise passengers also provide an economic stimulus to embarkation ports outside the United States. Finally, with 12.68 million cruise embarkations from U.S. ports in 2018, 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 2018 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 for 19 cruise lines. These cruise lines were: AIDA Cruises, Carnival Cruise Line, Carnival UK, Celebrity Cruises, Costa, Crystal Cruises, Cunard, Disney Cruise Line, Holland America Line, MSC, Norwegian Cruise Line, Oceania, P&O Cruises, Paul Gauguin Cruises, Princess Cruises, Regent, Royal Caribbean International, Seabourn, and TUI Cruise Lines. Combined, these cruise lines accounted for greater than 95 percent of all U.S. passenger embarkations.

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 Sales
Customs/Immigration/Int'l Arrivals Fees Charged to Passengers	Accounting & Legal Services
Air Fares 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	
Cost of Shore Excursions	
Crew Wages & Salaries	

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 2018 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 \$17.61 billion for goods and services with U.S. businesses during 2018, including more than \$2.27 billion for capital expenditures. Overall, this represents a 9.9 percent increase from similar expenditures in 2016. Total spending by the cruise lines has increased each year since 2010. As a result, the 2018 spending for goods and services by cruise lines reached a new peak and is 31 percent above the 2010 spend of \$13.40 billion.

Table 4 – U.S. Expenditures (\$ Billions) of the International Cruise Industry, 2010 – 2018

	2010	2012	2014	2016	2018	Growth			
						2012	2014	2016	2018
U.S. Purchases of Cruise Lines	\$13.40	\$14.63	\$ 15.63	\$16.02	\$17.61	4.0%	3.6%	2.5%	9.9%
Goods and Services	\$11.54	\$12.66	\$ 13.65	\$13.96	\$15.34	4.2%	4.0%	2.2%	9.9%
Capital Expenditures (incl. net interest)	\$ 1.86	\$ 1.97	\$ 1.98	\$ 2.06	\$ 2.27	2.5%	1.1%	3.8%	10.2%
Passengers and Crew	\$ 3.41	\$ 3.66	\$ 3.96	\$ 4.18	\$ 4.67	4.0%	8.9%	5.8%	11.2%
Wages & Taxes Paid by Cruise Lines	\$ 1.20	\$ 1.34	\$ 1.43	\$ 1.48	\$ 1.67	3.8%	3.1%	3.9%	12.8%
Total U.S.-based Spending	\$18.01	\$19.63	\$ 21.02	\$21.69	\$23.95	4.0%	4.6%	3.2%	10.5%

Source: Business Research and Economic Advisors

Cruise passengers and crew added \$4.67 billion in spending with U.S. businesses. Approximately one-third of these expenditures represented airfares that were directly purchased by passengers. Of the remaining passenger and crew expenditures, about half 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 \$4.67 billion in passenger and crew spending for 2018 increased by 11 percent from 2016, and represents a new high for passenger and crew spending in the United States.

Thus, the international cruise industry and its passengers and crew spent a total of \$22.28 billion for goods and services (excludes wages and taxes) provided by U.S. businesses, a 10 percent increase from similar expenditures in 2016. It is also 33 percent above the 2010 level of \$16.81 billion.

In addition to the direct purchase of goods and services from U.S. businesses, the cruise industry made combined payments of \$1.67 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 2016.

Including wages and taxes, the international cruise industry and its passengers and crew made total payments of \$23.95 billion to U.S. businesses, U.S.-resident cruise line employees and

U.S. taxing jurisdictions. This was a 10.5 percent increase from total spending by the international cruise industry in 2016.

Direct Economic Impacts in the United States During 2018

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 172,326 full and part-time jobs³ were generated, paying wages of \$8.32 billion during 2018.⁴ Thus, the 10.5 percent annual growth in direct industry expenditures resulted in a 8.9 percent increase in direct employment and a 13 percent increase in direct wage income relative to 2016. 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**).

Table 5 – Direct Economic Impacts of the Cruise Industry in the United States – 2018

Sector	Direct Spending \$ Millions	Direct Employment	Direct Wage Income \$ Millions
Core Cruise Travel Sector	\$ 12,212	124,180	\$ 5,300
Passenger & Crew Spending	\$ 2,395	28,271	\$ 746
Port Services & Cruise Lines	\$ 4,169	54,817	\$ 2,528
Transportation Services	\$ 3,315	29,169	\$ 1,412
Air Transportation	\$ 2,333	11,923	\$ 614
Cruise Industry Suppliers	\$ 11,743	48,146	\$ 3,023
Agriculture, Mining, Utilities & Construction	\$ 48	206	\$ 7
Manufacturing	\$ 5,826	13,088	\$ 901
Food & Beverages	\$ 1,077	2,277	\$ 106
Apparel & Textiles	\$ 163	913	\$ 43
Chemicals & Plastics	\$ 316	384	\$ 39
Petroleum Refining	\$ 1,757	141	\$ 20
Fabricated Metal Products	\$ 269	985	\$ 68
Industrial Machinery	\$ 513	1,453	\$ 100
Ship Maintenance & Repair	\$ 827	2,252	\$ 181
Computers & Electronic Equipment	\$ 298	865	\$ 94
Other Manufacturing	\$ 606	3,818	\$ 252
Wholesale Trade	\$ 704	3,202	\$ 232
Other Transportation Services	\$ 29	47	\$ 5
Information Services	\$ 291	573	\$ 52
Finance, Insurance, Real Estate & Leasing	\$ 1,194	3,015	\$ 286
Services & Government (ex. Lodging & Travel Service)	\$ 3,651	28,015	\$ 1,539
Professional, Scientific & Technical Services	\$ 2,104	16,111	\$ 796
Administrative & Waste Management Services	\$ 50	226	\$ 15
Arts, Entertainment & Recreation	\$ 235	1,843	\$ 98
Other Services & Government	\$ 1,262	9,835	\$ 631
Total - 2018	\$ 23,955	172,326	\$ 8,323
Total - 2016	\$ 21,686	158,226	\$ 7,383
Percentage Change from 2016	10.5%	8.9%	12.7%

Source: Business Research and Economic Advisors

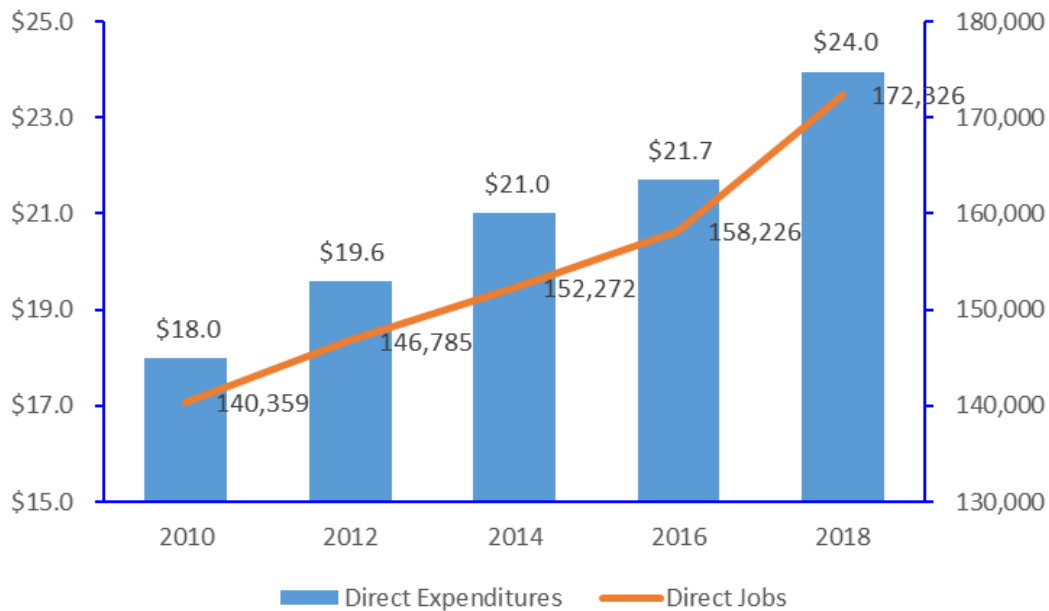
³ Throughout this report all employment impacts are the sum of annualized full- and part-time jobs.

⁴ These figures include the U.S. employees of the cruise lines and the industry's trade associations and their wage income.

Figure 3 shows the direct cruise industry expenditures and direct employment impacts from 2010 through 2018. Direct cruise industry expenditures have increased each period, from \$18.01 billion in 2010 to \$23.95 billion in 2018, a 33 percent increase.

Similarly, the annual direct employment contribution has increased by more than 23 percent since 2010, rising from 140,359 to 172,326.

Figure 3– Direct Cruise Industry Expenditures and Employment, 2010 – 2018



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 \$12.21 billion in direct spending by the cruise lines and their passengers and crew in 2018. This, in turn, supported the employment of an estimated 124,180 workers, an increase of 11 percent from 2016, and \$5.30 billion in wage income, for an increase of 16 percent.

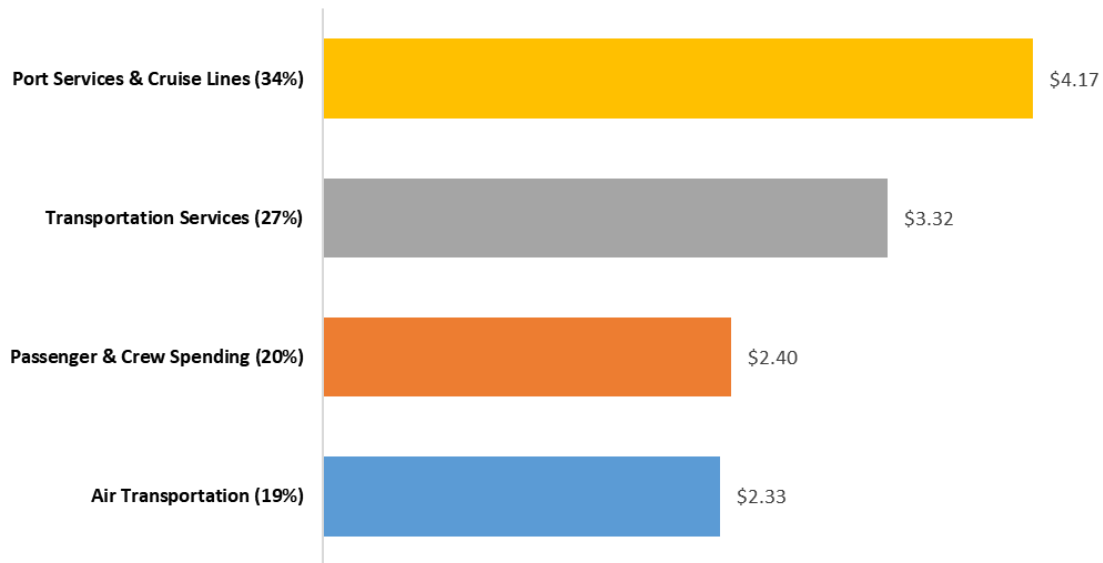
Spending in the core cruise travel sector totaled \$12.2 billion while the cruise industry purchased an additional \$11.74 billion in goods and services from its direct suppliers. Thus,

the core cruise travel sector accounted for 51 percent of the direct spending by the cruise industry, 72 percent of the direct employment, and 64 percent of the direct wage income, all relatively unchanged from the 2016 study.

Port Services and Cruise Lines in the United States

Once again in 2018, 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 – 2018 (\$12.2 Billion)

Source: Business Research and Economic Advisors

During 2018, the cruise industry spent \$4.17 billion on port services, up 18 percent from \$3.52 billion in 2016. As a result of these expenditures, port service providers, the cruise lines and their trade associations provided 54,817 full- and part-time jobs, an increase of 11 percent from 2016, and paid an annual income of \$2.53 billion.

On an industry basis, 83 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 approximately 61 percent of the employment and wage impacts in this sector. The remaining 39 percent 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 \$3.32 billion in direct expenditures, the transportation services sector was the second largest component of the core cruise travel sector and accounted for 27 percent of cruise industry spending within the core cruise travel sector. Transportation services primarily include travel agents and tour operators.

The \$3.32 billion in spending by the cruise lines and their passengers and crew for transportation services was an 18 percent increase from 2016. Overall, BREa estimated that the cruise industry spending for these transportation services was responsible for the generation of 29,169 jobs in this sector paying \$1.41 billion in wage income. The employment impact rose by 10 percent from 2016 while the income impact increased by 13 percent.

Air Transportation Services in the United States

Air transportation accounts for another 19 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 \$2.33 billion on air transportation, an increase of 12 percent from 2016. These expenditures produced 11,923 jobs in the United States an increase of 9.3 percent from 2016, while the wage income impact increased by 12 percent to \$614 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.⁵ First, as previously discussed, 12.68 million passengers embarked on cruises at U.S. ports. Second, the industry generated approximately 6.16 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 \$2.40 billion in the United States during 2018, an increase of 14 percent from 2016. These expenditures accounted for 20 percent of cruise industry spending within the core cruise travel sector. This spending was responsible for the generation of 28,271 jobs in the U.S., an increase of 13 percent from 2016. The associated annual wages are \$746 million, increased by 14 percent from 2016.

On an industry basis, the employment and wage impacts were concentrated in three key industries: the accommodation, food and beverage service, and retail industries (including

⁵ Passenger and crew expenditures for sightseeing and shore excursions are included in the Transportation Services category of the core cruise travel sector.

tours and sightseeing). The accommodation sector accounted for 64 percent of passenger and crew non-transportation expenditures, while the food and beverage service sector accounted for about 23 percent and the retail trade industry accounted for the remaining 13 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 \$2.85 billion in port cities throughout the United States. This was an 18 percent increase from 2016. As shown in **Table 6** and **Figure 5**, embarkation passengers accounted for 59 percent of the total spending with \$1.69 billion in 2018. Based upon the passenger survey data referenced previously, about 42 percent of embarking passengers stayed one or more nights in a port city and spent a total of \$1.46 billion during their visits. On average, these overnight cruise visitors spent \$272 per visit. The average length of stay of these passengers was approximately 1.1 nights.

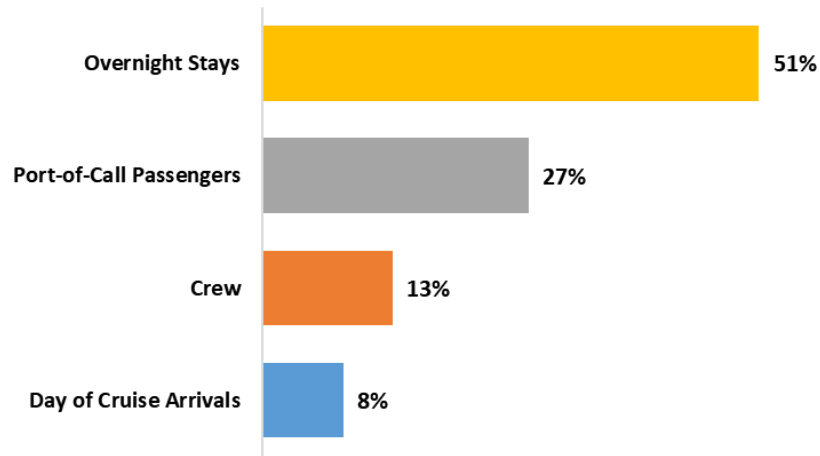
Table 6 – Passenger and Crew Expenditures in the United States – 2018

	Visits	Spending	Spending per Visit
Embarkation Passenger	12,682,884	\$ 1,690,917,050	\$ 133.32
Overnight Stays	5,359,356	\$ 1,455,257,735	\$ 271.54
Day of Cruise Arrivals	7,323,528	\$ 235,659,315	\$ 32.18
Port-of-Call Passengers	6,160,916	\$ 779,968,644	\$ 126.60
Crew	8,069,390	\$ 380,270,106	\$ 47.13
Total U.S.-based Spending	26,913,190	\$ 2,851,155,800	\$ 105.94

Source: Business Research and Economic Advisors

Embarking passengers who arrived at the port city on the day of their cruise spent an average of \$32. Most of these expenditures were for local transit, parking and limited food and retail purchases. In total, we estimated that these passengers spent \$236 million during 2016.

Figure 5 – Distribution of Spending by Passenger and Crew in the United States – 2018
Total = \$2. Billion



Source: Business Research and Economic Advisors

BREA also estimated that the cruise industry generated 6.16 million transit port-of-call visits.⁶ Approximately 61 percent of these visits were made to ports in Alaska, unchanged from 2016. 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 for transit port-of-call passengers indicated that the typical port-of-call passenger spent an average of nearly \$127 per visit. Consequently, we have estimated that these passengers spent \$780 million in the United States during 2018, or 27 percent of the total passenger and crew spending. The average passenger expenditure per port-of-call visit increased slightly from 2016.

Finally, crew onboard the cruise ships will disembark at both ports-of-embarkation and transit ports-of-call. We estimated that about 8.1 million crew arrivals were made at U.S. port cities in 2018. The average per crew expenditures was \$47 per arrival, virtually unchanged from the last study. Crew spent an estimated \$380 million in the United States during 2018, up 12 percent from 2016. This equates to 13 percent of the total expenditures of passengers and crew.

⁶ Since individual passengers will make several port-of-call visits on any itinerary, passenger visits are approximately three times greater than the number of passengers taking cruises to U.S. ports-of-call.

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 3,000-passenger ship generated an average of approximately \$433,000 in passenger and crew onshore spending per call in the home port city during 2018. A similar ship making transit port-of-call visits generated an average of approximately \$396,000 in passenger and crew onshore spending per U.S. port call.

Table 7 – Estimated Onshore Spending Generated by a 3,000-Passenger Cruise Ship – 2018

	Visits	Spending	Spending per Pax/Crew
Homeport Cruise Visits (Pax & Crew)	3,750	\$ 433,469	\$ 115.59
Passengers with Overnight Stays	1,260	\$ 342,135	\$ 271.54
Passengers Arriving on Day of Cruise	1,740	\$ 55,990	\$ 32.18
Crew	750	\$ 35,344	\$ 47.13
Port-of-Call Cruise Visits (Pax & Crew)	3,600	\$ 396,152	\$ 110.04
Passengers	2,850	\$ 360,808	\$ 126.60
Crew	750	\$ 35,344	\$ 47.13

Source: Business Research and Economic Advisors

Other Direct Impacts in the United States – Cruise Line Expenditures

During 2018, U.S. businesses outside the core cruise travel sector received \$11.74 billion in direct spending by the cruise lines. These expenditures generated an estimated 48,146 jobs in the nation paying wage income of \$3.02 billion. Expenditures with suppliers increased by 5.1 percent from 2016. As a result of a shift in industry mix and productivity gains, the employment impact among cruise industry suppliers increased by about 3.1 percent while the income impact rose by 7.9 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. These economic impacts by sector are as follows:

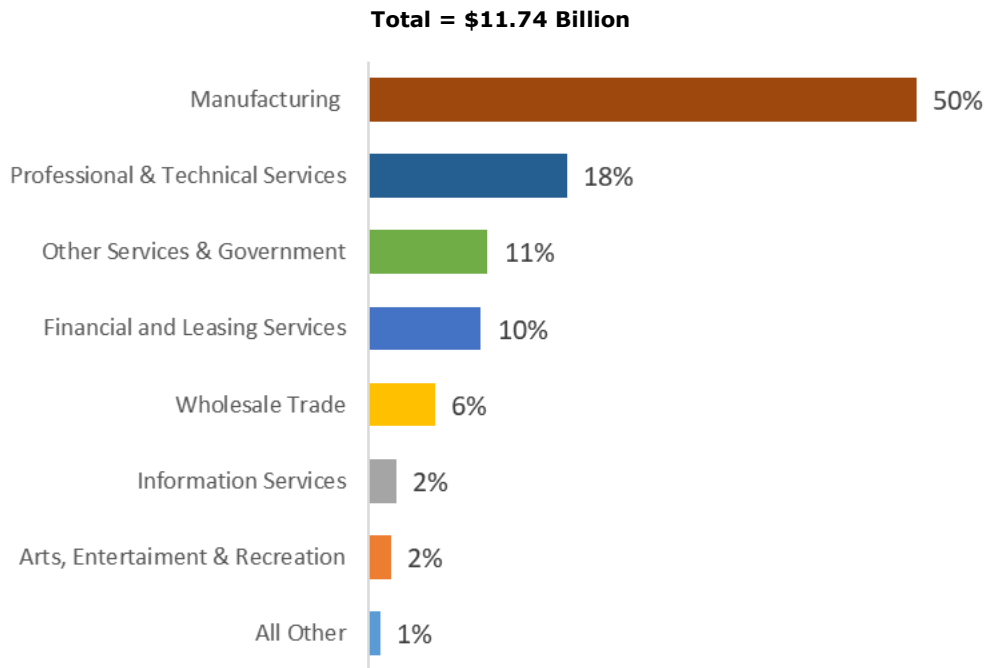
- Professional, Scientific and Technical Services (\$2.10 billion in direct expenditures, 16,111 jobs, and \$796 million in wage income) comprised of a very broad range of business services, including legal, accounting and consulting services; advertising, promotional and marketing agencies; computer hardware and software consulting; and security and manpower services. The direct cruise industry expenditures with these service providers increased by 20 percent from 2016. The subsequent employment impact rose by 2.2 percent while the income impact increased by 14 percent.

- Petroleum Refining (\$1.76 billion in direct expenditures, 141 jobs and \$20 million in wage income): the refining of petroleum products used to power the cruise ships and lubricate engines and equipment. During 2018, expenditures for petroleum products increased by nearly 8 percent. The employment and wage impacts in this capital intensive industry increased by 5.3 percent and 6.1 percent, respectively.
- Finance, Insurance, Real Estate and Leasing (\$1.19 billion in direct expenditures, 3,015 jobs, \$286 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 5.8 percent from 2016. The employment impact increased by 3.1 percent from while the income impact increased by 10 percent from 2016.
- Food and Beverages (\$1.08 billion in direct expenditures, 2,277 jobs, and \$106 million in wage income): cruise line purchases of alcoholic and non-alcoholic beverages and food consumed on the cruise ships by passengers and crew. The cruise industry increased its expenditures on food and beverages by 3.4 percent in 2018. The direct employment impact rose by 1.7 percent while the wage impact increased by 2.7 percent.
- Ship Maintenance and Repair (\$827 million in direct expenditures, 2,252 jobs and \$181 million in wage income): includes cruise ship maintenance and repair by all of the cruise lines at U.S. shipyards and the construction of support vessels, such as lifeboats and passenger tenders. Cruise industry expenditures for ship repair and maintenance in the U.S. increased by 6.5 percent from 2016. The direct employment impact rose by 3.5 percent while the wage impact rose by 4.3 percent from 2016.
- Wholesale Trade (\$704 million in direct expenditures, 3,202 jobs, and \$232 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 18 percent from 2016. The employment impact rose by 10 percent, while the wage impact increased by 18 percent from 2016.
- Industrial Machinery (\$513 million in direct expenditures, 1,453 jobs, and \$100 million in wage income): includes heavy equipment used to power the cruise ships such as boilers and turbines, elevators and parts, printing equipment, kitchen and restaurant equipment and plumbing and water treatment equipment. Direct expenditures in this industry increased by 6.2 percent while the direct employment rose by 4.1 percent. The wage impacts increased by 6.6 percent over 2016.
- Computers and Electronic Equipment (\$298 million in direct expenditures, 865 jobs and \$94 million in wage income): includes the manufacture of computers, lighting equipment, audiovisual products and communication and navigation equipment. The cruise industry's expenditures for computers and electronic equipment was up 3.6 percent from 2016. As a result, the direct employment

impact in this industry also increased by 3.6 percent and the wage income impact rose by 4.7 percent.

- **Fabricated Metal Products** (\$269 million in direct expenditures, 985 jobs, and \$68 million in wage income): includes a variety of hard goods, such as doors and fixtures in cabins and crew quarters, security equipment, fabricated products used in equipment and storage facilities on the cruise ships, etc., and tools used onboard cruise ships during repair and maintenance of the vessels. Direct expenditures in this industry increased by 11 percent from 2016 while the direct employment and wage impacts increased by 7.4 percent and 8.8 percent, respectively.
- **Arts, Entertainment and Recreation** (\$235 million in direct expenditures, 1,843 jobs and \$98 million in wage income): includes the purchase of art work for cruise ships, the hiring of designers, entertainers and crew for shows onboard cruise ships and other recreational activities on and off the cruise ships. Cruise industry expenditures for entertainment services increased by 9.6 percent over 2016. The direct employment impact increased by 2.0 percent while the wage income impact rose by 1.0 percent.

Figure 6 – Distribution of Direct Expenditures to Cruise Industry Suppliers – 2018



Source: Business Research and Economic Advisors

Indirect and Induced Economic Impacts in the United States During 2018

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.⁷ 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 249,385 jobs in the United States through the indirect and induced spending by businesses and employees, an increase of 7.9 percent from 2016. In addition, these jobs generated \$14.83 billion in wage income for these workers, an increase of 12 percent from 2016. As shown in **Table 8**, the indirect/induced economic impacts touch virtually every industry in the nation.

⁷ 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 United States – 2018

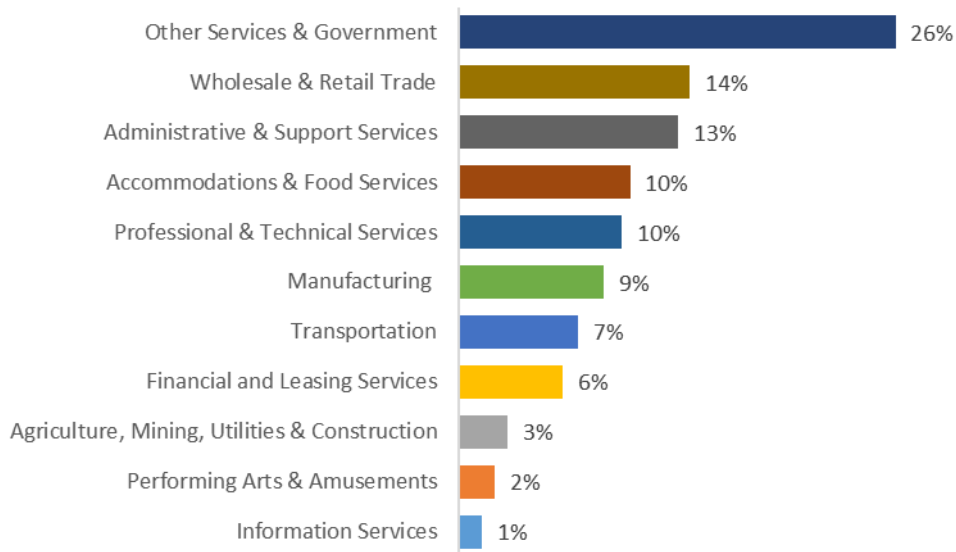
Sector	Cruise Industry Direct Spending \$ Millions	Indirect/ Induced Employment	Indirect/ Induced Wage Income \$ Millions
Agriculture, Mining, Utilities & Construction	\$ 48	7,136	\$ 615
Manufacturing	\$ 5,826	21,342	\$ 1,606
Food & Beverages	\$ 1,077	2,249	\$ 123
Apparel & Textiles	\$ 163	1,699	\$ 92
Paper & Printing	\$ 116	1,294	\$ 87
Chemicals & Plastics	\$ 316	2,471	\$ 221
Petroleum Refining	\$ 1,757	488	\$ 33
Fabricated Metal Products	\$ 269	3,781	\$ 239
Industrial Machinery	\$ 513	883	\$ 70
Transportation Equipment	\$ 828	2,212	\$ 194
Computers & Electronic Equipment	\$ 298	2,367	\$ 288
Other Manufacturing	\$ 489	3,898	\$ 259
Wholesale & Retail Trade	\$ 1,078	33,979	\$ 1,762
Transportation	\$ 6,008	17,457	\$ 920
Information Services	\$ 291	3,380	\$ 349
Finance, Insurance, Real Estate & Leasing	\$ 1,194	15,154	\$ 1,510
Services & Government	\$ 9,510	150,937	\$ 8,066
Professional, Scientific & Technical Services	\$ 2,104	23,950	\$ 2,333
Administrative & Waste Management Services	\$ 3,536	32,262	\$ 1,154
Accommodations & Food Services	\$ 2,223	25,217	\$ 551
Performing Arts & Amusements	\$ 235	5,195	\$ 211
Other Services & Government	\$ 1,412	64,313	\$ 3,816
Total - 2018	\$ 23,955	249,385	\$ 14,828
Total - 2016	\$ 21,686	231,206	\$ 13,192
Percentage Change from 2016	10.5%	7.9%	12.4%

Source: Business Research and Economic Advisors

The Services & Government sector was the most significantly impacted sector within the nation. This sector accounted for 61 percent of the indirect/induced employment impact and 54 percent of the wage impact. The indirect/induced impacts of cruise industry spending generated 150,937 jobs in the Services and Government sector paying \$8.07 billion in wage income. The indirect/induced employment impacts in this sector rose by 8.5 percent while the income increased by 11 percent from 2016. Within the Services & Government segment, approximately 99 percent of the employment and income impacts were in the services industry. Federal, state and local government agencies accounted for the remaining one percent.

Within the Professional, Scientific and Technical Services subsector, the indirect impacts added 23,950 jobs, an increase of 4.3 percent from 2016, and \$2.33 billion in wage income, a growth of 6.4 percent over 2016. 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 – 2018
Total = 249,385 Jobs



Source: Business Research and Economic Advisors

Another 32,262 jobs and \$1.15 billion in income were generated in the Administrative and Waste Management Services subsector. The respective percentage increases from 2016 for the employment and wage income impacts were 18 and 22 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 25,217 jobs and \$551 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 9.0 percent from 2016 and the income impact increased by 11 percent.

The indirect impacts measured in the Other Services & Government subsector are primarily personal, health, amusement and entertainment, and educational and social services that are generated by the spending of households whose income is directly and indirectly generated by the cruise industry. With respective indirect employment and income impacts of 64,313 jobs and \$3.82 billion, the indirect employment impacts jumped by 5.9 percent from 2016 while the income impacts increased by 11 percent.

An estimated 33,979 indirect jobs, 14 percent of the total indirect employment impacts, with an annual income of \$1.76 billion were generated in the Wholesale & Retail Trade sector because of cruise industry spending in 2018. Relative to 2016, the indirect employment impacts in this sector rose by 11 percent while the wage income impacts increased by 17 percent. The wholesale trade subsector accounted for approximately 31 percent of the indirect employment impacts and 56 percent of the wage income impacts in the two subsectors. 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 17,457 indirect jobs, 7.0 percent of the total indirect employment impacts, paying \$920 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 4.3 percent from 2016 while the income impacts increased by 8.3 percent.

Finally, the indirect/induced impacts of cruise industry spending generated 21,342 jobs within the Manufacturing sector during 2018, 8.6 percent of the total indirect employment. These jobs paid \$1.61 billion in annual income, an increase of 4.2 percent from 2016. The majority of the employment impacts were spread among nine industries with the employment impacts ranging from 488 jobs in the petroleum refining industry to 3,718 jobs in the fabricated metals industry. Combined, the nine industries shown in Table 8 (above) accounted for 82 percent of the indirect employment impacts in the Manufacturing sector.

Total Economic Impacts in the United States During 2018

Even though the international cruise industry provides a service that is considered an import to the U.S. economy, it is responsible for considerable domestic economic activity. As noted

previously the industry directly spent \$23.96 billion in the United States in 2018. As shown in **Table 9**, this spending generated \$52.67 billion in total industry output among U.S. businesses during 2018, an increase of 10.3 percent from 2016. The \$52.67 billion in total output resulted in the employment of 421,711 workers, an increase of 8.3 percent from 2016, and \$23.15 billion in wages and salaries, a growth of 13 percent from 2016. 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 – 2018

Sector	Total Output \$ Millions	Total Employment	Total Wage Income \$ Millions
Agriculture, Mining, Utilities & Construction	\$ 5,233	7,342	\$ 622
Manufacturing	\$ 11,481	34,430	\$ 2,507
Food & Beverages	\$ 921	3,426	\$ 229
Apparel & Textiles	\$ 1,265	1,912	\$ 135
Paper and Printing	\$ 342	1,693	\$ 128
Chemicals & Plastics	\$ 507	4,556	\$ 227
Petroleum Refining	\$ 1,064	779	\$ 99
Fabricated Metal Products	\$ 739	4,413	\$ 329
Industrial Machinery	\$ 749	1,636	\$ 251
Transportation Equipment	\$ 1,269	2,510	\$ 288
Computers & Electronic Equipment	\$ 3,387	3,033	\$ 554
Other Manufacturing	\$ 1,238	10,472	\$ 268
Wholesale & Retail Trade	\$ 3,265	37,427	\$ 2,007
Transportation	\$ 8,163	84,283	\$ 4,096
Information Services	\$ 1,002	3,953	\$ 402
Finance, Insurance, Real Estate & Leasing	\$ 4,630	18,169	\$ 1,796
Services & Government	\$ 18,897	236,107	\$ 11,720
Professional, Scientific & Technical Services	\$ 5,967	40,061	\$ 3,129
Administrative & Waste Management Services	\$ 4,472	64,813	\$ 1,909
Accommodations & Food Services	\$ 2,268	50,595	\$ 1,195
Performing Arts & Amusements	\$ 984	17,543	\$ 449
Other Services & Government	\$ 5,207	63,095	\$ 5,025
Total - 2018	\$ 52,672	421,711	\$ 23,151
Total - 2016	\$ 47,758	389,432	\$ 20,575
Percentage Change from 2016	10.3%	8.3%	12.5%

Source: Business Research and Economic Advisors

Since 2010, the total economic impact of the international cruise industry has increased significantly. Total annual output supported by the cruise industry has increased by 39 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 28 percent and 52 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

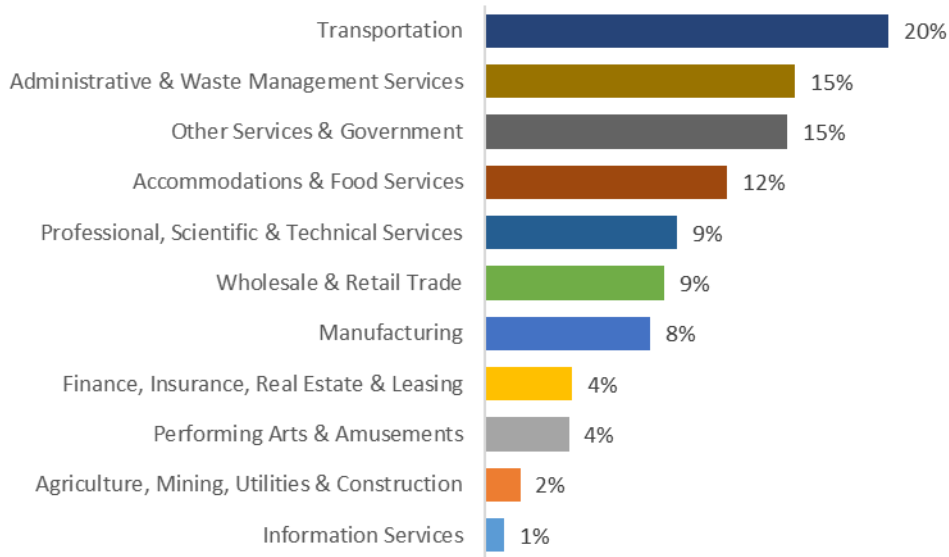
However, many other industries were affected in some form, including lodging, insurance, telecommunications, retail trade and many others.

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. Nearly 84,300 jobs were generated in this sector, accounting for 20 percent of the total employment impact. These jobs, in turn, generated \$4.10 billion in wages.

The Administrative & Waste Management Services and the Other Services & Government subsectors each accounted for 15 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 nearly 128,000 jobs and \$6.93 billion in wages during 2018 as a result of the spending by the international cruise industry.

Approximately \$11.48 billion in output was generated in the Manufacturing sector. With 34,430 jobs created, the Manufacturing sector accounted for 8.2 percent of the total jobs, and 11 percent of the income (\$2.51 billion) generated by cruise industry spending. Durable goods accounted for 54 percent of manufacturing while nondurable goods accounted for 46 percent.

Figure 8 – Distribution of Total Employment Impacts – 2018
Total = 421,711 Jobs



Source: Business Research and Economic Advisors

Finally, the Wholesale & Retail Trade sector accounted for 8.9 percent of the total employment impact of the cruise industry having generated just over 37,000 jobs and \$2.0 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 2018

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 and Wage Impacts of the International Cruise Industry for All States – 2018

State	2018	2016	Direct Purchases (\$ Millions)	Share of the U.S.	Total Employment	Share of the U.S.	Total Income (\$ Millions)	Share of the U.S.	Average Annual Wage (\$1,000)
Florida	1	1	\$ 8,485	35.4%	154,646	36.7%	\$ 7,689	33.2%	\$ 46.5
California	2	2	\$ 2,501	10.4%	49,369	11.7%	\$ 3,260	14.1%	\$ 59.2
Texas	3	3	\$ 1,511	6.3%	26,241	6.2%	\$ 1,749	7.6%	\$ 57.2
New York	4	4	\$ 1,295	5.4%	17,240	4.1%	\$ 1,123	4.9%	\$ 58.6
Alaska	5	5	\$ 1,242	5.2%	22,447	5.3%	\$ 1,156	5.0%	\$ 45.7
Washington	6	6	\$ 837	3.5%	19,189	4.6%	\$ 1,082	4.7%	\$ 51.3
Georgia	7	7	\$ 752	3.1%	13,802	3.3%	\$ 761	3.3%	\$ 51.3
Illinois	8	8	\$ 590	2.5%	8,761	2.1%	\$ 555	2.4%	\$ 58.6
New Jersey	9	10	\$ 530	2.2%	9,649	2.3%	\$ 584	2.5%	\$ 56.7
Louisiana	10	11	\$ 477	2.0%	8,966	2.1%	\$ 386	1.7%	\$ 39.7
Pennsylvania	11	12	\$ 450	1.9%	7,086	1.7%	\$ 420	1.8%	\$ 55.7
Hawaii	12	14	\$ 445	1.9%	6,732	1.6%	\$ 246	1.1%	\$ 35.4
Colorado	13	13	\$ 410	1.7%	2,727	0.6%	\$ 172	0.7%	\$ 57.2
Massachusetts	14	9	\$ 393	1.6%	6,031	1.4%	\$ 428	1.8%	\$ 61.3
Indiana	15	15	\$ 354	1.5%	8,304	2.0%	\$ 429	1.9%	\$ 48.5
North Carolina	16	16	\$ 307	1.3%	4,387	1.0%	\$ 213	0.9%	\$ 46.7
Michigan	17	17	\$ 291	1.2%	3,679	0.9%	\$ 217	0.9%	\$ 55.7
Maryland	18	19	\$ 260	1.1%	4,471	1.1%	\$ 253	1.1%	\$ 53.6
Arizona	19	18	\$ 247	1.0%	4,088	1.0%	\$ 187	0.8%	\$ 43.5
Ohio	20	20	\$ 244	1.0%	4,569	1.1%	\$ 231	1.0%	\$ 47.5
Virginia	21	22	\$ 238	1.0%	3,563	0.8%	\$ 217	0.9%	\$ 57.1
Connecticut	22	21	\$ 206	0.9%	1,585	0.4%	\$ 135	0.6%	\$ 76.3
Oregon	23	24	\$ 196	0.8%	5,151	1.2%	\$ 252	1.1%	\$ 45.5
Alabama	24	28	\$ 185	0.8%	2,869	0.7%	\$ 135	0.6%	\$ 43.3
Missouri	25	23	\$ 172	0.7%	3,752	0.9%	\$ 197	0.9%	\$ 48.1
South Carolina	26	25	\$ 170	0.7%	3,375	0.8%	\$ 136	0.6%	\$ 37.7
Minnesota	27	26	\$ 133	0.6%	2,364	0.6%	\$ 144	0.6%	\$ 57.1
Tennessee	28	29	\$ 115	0.5%	1,925	0.5%	\$ 92	0.4%	\$ 44.4
Nevada	29	27	\$ 108	0.5%	1,491	0.4%	\$ 72	0.3%	\$ 44.4
Wisconsin	30	32	\$ 74	0.3%	1,175	0.3%	\$ 55	0.2%	\$ 44.6
Maine	31	33	\$ 73	0.3%	1,077	0.3%	\$ 39	0.2%	\$ 34.1
Kentucky	32	30	\$ 70	0.3%	1,545	0.4%	\$ 70	0.3%	\$ 41.9
Kansas	33	34	\$ 62	0.3%	1,875	0.4%	\$ 90	0.4%	\$ 44.2
Utah	34	36	\$ 59	0.2%	1,290	0.3%	\$ 56	0.2%	\$ 40.0
Oklahoma	35	39	\$ 53	0.2%	1,000	0.2%	\$ 45	0.2%	\$ 42.5
Dist. of Columbia	36	35	\$ 52	0.2%	319	0.1%	\$ 47	0.2%	\$ 129.0
Mississippi	37	38	\$ 50	0.2%	695	0.2%	\$ 27	0.1%	\$ 37.1
Iowa	38	37	\$ 49	0.2%	429	0.1%	\$ 19	0.1%	\$ 41.7
Arkansas	39	40	\$ 39	0.2%	687	0.2%	\$ 26	0.1%	\$ 35.1
New Hampshire	40	31	\$ 36	0.2%	387	0.1%	\$ 23	0.1%	\$ 51.7
Delaware	41	41	\$ 35	0.1%	279	0.1%	\$ 17	0.1%	\$ 54.8
Nebraska	42	42	\$ 30	0.1%	552	0.1%	\$ 27	0.1%	\$ 43.8
Rhode Island	43	43	\$ 30	0.1%	426	0.1%	\$ 19	0.1%	\$ 40.9
New Mexico	44	44	\$ 21	0.1%	301	0.1%	\$ 15	0.1%	\$ 45.4
Idaho	45	45	\$ 19	0.1%	327	0.1%	\$ 14	0.1%	\$ 40.5
West Virginia	46	47	\$ 15	0.1%	292	0.1%	\$ 12	0.1%	\$ 37.4
Vermont	47	46	\$ 15	0.1%	99	0.0%	\$ 6	0.0%	\$ 48.6
North Dakota	48	48	\$ 10	0.0%	196	0.0%	\$ 7	0.0%	\$ 34.8
Montana	49	50	\$ 8	0.0%	130	0.0%	\$ 6	0.0%	\$ 36.4
South Dakota	50	49	\$ 8	0.0%	113	0.0%	\$ 4	0.0%	\$ 35.9
Wyoming	51	51	\$ 4	0.0%	58	0.0%	\$ 3	0.0%	\$ 43.4
U. S. Total			\$ 23,955		421,711		\$ 23,151		\$ 54.9

Source: Business Research and Economic Advisors

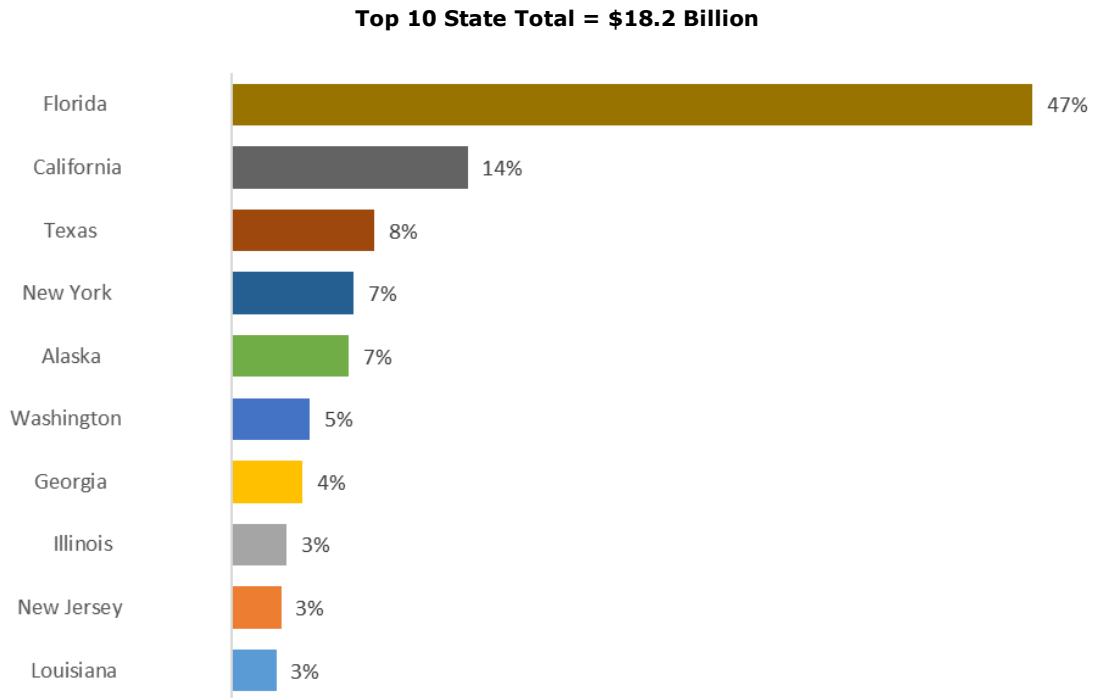
Economic Impacts in the Top 10 States

As shown in **Table 10**, all states had some direct expenditures generated by the international cruise industry in 2018. This ranged from approximately \$4 million in Wyoming to nearly \$8.49 billion in Florida.

The top 10 states accounted for 76 percent of the direct expenditures of the cruise industry with \$18.22 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 over 330,000 jobs paying \$18.35 billion in wage income, 79 percent of the total national impact.

Of the remaining states, 14, received less than \$50 million in direct cruise industry expenditures. These were all largely source market states with smaller populations. Another 22 states, including the District of Columbia 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 five states that received between \$350 and \$450 million in direct cruise industry expenditures. Pennsylvania, Indiana 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 – 2018



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 from the United States. As shown in **Table 11**, 7.5 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 Jacksonville⁸, accounting for 59 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 2018 Cruise Industry Impacts – Florida

	Florida	Share of the U.S.
Passenger Embarkations	7,512,000	59.2%
Resident Cruise Passengers	2,268,000	17.3%
Total Passenger Visits & Crew Arrivals	12,416,000	46.1%
Direct Expenditures (\$ Millions)	\$ 8,485	35.4%
Total Employment Impact	154,646	36.7%
Total Wage Impact (\$ Millions)	\$ 7,689	33.2%

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

The state also led the nation in U.S.-sourced cruise passengers with 2.3 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 2016, Florida experienced an increase of 6.1 percent in passenger embarkations, but saw a decrease of 23 percent in sourced passengers.

⁸ 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 12.4 million passenger visits and crew arrivals, accounting for 46 percent of all passenger visits and crew arrivals in the United States. These visits produced an estimated \$1.22 billion in passenger and crew onshore spending, or nearly \$100 per passenger visit and crew arrival. As in 2016, 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 15 percent from 2016 as a result of the increase in passenger 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 will break ground on an expanded corporate headquarters in the summer of 2019, and Carnival Cruise Lines has approved the construction of a new terminal at Port Canaveral, with a scheduled 2020 completion date. Overall, operations in 2018 employed nearly 22,000 workers, 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 \$8.49 billion, or 35 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 approximately \$3.80 billion, or 45 percent of the industry's direct expenditures in Florida. Another 22 percent of direct spending went to the manufacturing industry with \$1.87 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 154,646 jobs and \$7.69 billion in income throughout the Florida during 2018. Florida's total employment impact increased by 3.8 percent while the total wage impact rose by 8.4 percent. These impacts accounted for 37 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 1,117,000 passenger embarkations during 2018, 8.8 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 2016 Cruise Industry Impacts – California

	California	Share of the U.S.
Passenger Embarkations	1,117,000	8.8%
Resident Cruise Passengers	1,419,000	10.8%
Total Passenger Visits & Crew Arrivals	2,165,000	8.0%
Direct Expenditures (\$ Millions)	\$ 2,501	10.4%
Total Employment Impact	49,369	11.7%
Total Wage Impact (\$ Millions)	\$ 3,260	14.1%

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

Collectively, the California embarkation ports experienced an increase in embarkations from 2016 to 2018 of 5.7 percent, although two of the four (San Francisco and Los Angeles) experienced decreases since 2016.

Embarkations in San Francisco reached a peak of 112,000 in 2016 before experiencing a decrease to a total of 103,000 in 2018. Despite this decrease, and the low absolute number of annual embarkations compared to other ports in the state, San Francisco embarkations have grown more than two and one-half times the number of embarks from 2010, the most in the state. After reversing 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. Los Angeles and Long Beach have consistently been the busier ports in California. This trend continues in 2018 with Long Beach reaching a new high of 660,000 embarks, a 12% increase over 2016, and Los Angeles experiencing a decrease from 2016 with 247,000 embarks.

Cruise passengers sourced from California accounted for 11 percent of U.S.-sourced passengers and totaled 1.4 million during 2018, an increase of 2.0 percent from 2016. 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 2.2 million passenger visits and crew arrivals, accounting for 8.0 percent of all passenger visits and crew arrivals in the United States. These visits produced an estimated \$151 million in passenger and crew onshore spending, or about \$70 per passenger visit and crew arrival. Total estimated spending by passengers and crew increased by 4.9 percent from 2016 as a result of the 2.1 percent increase in passenger 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, the industry had almost 2,300 employees in California, or about 6.1 percent of total employment of the cruise lines throughout the United States.

Total direct cruise industry expenditures in California were approximately \$2.50 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 \$905 million, or 36 percent of the industry's direct expenditures in California. Another \$587 million, or 23 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 49,369 jobs and \$3.26 billion in income throughout the California economy during 2018. These impacts accounted for 12 percent of national employment impact and 14 percent of the national wage impact.

Texas

During 2018, Galveston, Texas' major cruise port, had 985,000 embarkations, which accounts for 7.8 percent of all U.S. cruise embarkations. Galveston is one of the few ports throughout the country that has seen an increase in each of the two-year periods since 2010 combining for total growth of 126% over that time frame, including a 13% increase in 2018. Cruise passengers sourced from Texas accounted for 9.2 percent of all U.S.-sourced passengers and totaled 1.2 million during 2018. The larger number of sourced passengers than passenger embarkations makes Texas a net exporter of cruise passengers.

Table 13 – Summary of 2018 Cruise Industry Impacts – Texas

	Texas	Share of the U.S.
Passenger Embarkations	985,000	7.8%
Resident Cruise Passengers	1,198,000	9.2%
Total Passenger Visits & Crew Arrivals	1,404,000	5.2%
Direct Expenditures (\$ Millions)	\$ 1,511	6.3%
Total Employment Impact	26,241	6.2%
Total Wage Impact (\$ Millions)	\$ 1,749	7.6%

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

Combining passenger visits and crew arrivals, ships making calls in Texas generated an estimated 1.4 million passenger visits and crew arrivals, accounting for 5.2 percent of all passenger visits and crew arrivals in the United States. The visits produced an estimated \$115 million in passenger and crew onshore spending, or approximately \$81 per passenger visit and crew arrival. Total passenger and crew spending in 2018 increased by 19 percent from 2016, due in part to the nearly 10 percent increase in visits.

As a result of the increase in cruise operations in Galveston, cruise industry direct expenditures increased by 6.2 percent in 2018 to \$1.51 billion, representing 6.3 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 approximately \$785 million, 52 percent of the industry's direct expenditures in Texas. Another \$448 million, 30 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 18 percent of 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 26,241 jobs and \$1.75 billion in income throughout the Texas economy during 2018. These impacts accounted for 6.2 percent of national employment impact and 7.6 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 557,000 passenger embarkations during 2018, 4.4 percent of total U.S. embarkations. The Manhattan Cruise Terminal handled approximately 88 percent of the passengers while the Brooklyn Cruise Terminal, processed the remaining 12 percent.

Table 14 – Summary of 2018 Cruise Industry Impacts – New York

	New York	Share of the U.S.
Passenger Embarkations	557,000	4.4%
Resident Cruise Passengers	747,000	5.7%
Total Passenger Visits & Crew Arrivals	845,000	3.1%
Direct Expenditures (\$ Millions)	\$ 1,295	5.4%
Total Employment Impact	17,240	4.1%
Total Wage Impact (\$ Millions)	\$ 1,123	4.9%

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

Cruise passengers sourced from New York accounted for 5.7 percent of U.S.-sourced passengers and totaled 747,000 during 2018. As a result, New York was a net exporter of cruise passengers.

Relative to 2016, New York experienced a 12 percent increase in passenger embarkations. As a result, New York's share of passenger embarkations grew from 4.3 percent in 2016 to 4.4 percent in 2018.

Including homeport and transit calls, cruising at New York cruise terminals generated an estimated 845,000 passenger visits and crew arrivals, accounting for 3.1 percent of all passenger visits and crew arrivals in the United States. This was a 12 percent increase from 2016. These visits produced an estimated \$171 million in passenger and crew onshore spending, or \$202 per passenger visit and crew arrival. Passenger and crew spending increased by 40 percent from 2016.

Cruise industry direct expenditures in New York totaled \$1.30 billion, or 5.4 percent of the direct expenditures generated by the cruise industry in the United States. Direct cruise industry expenditures in the state increased by 13 percent from 2016.

Tourism-related businesses, such as travel agencies, airlines, hotels, etc., received approximately \$539 million, 42 percent of the industry's direct expenditures in New York. Another \$545 million, also 42 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 16 percent of 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 17,240 jobs paying \$1.12 billion in income throughout the New York economy during 2016. These impacts accounted for 4.1 percent of national employment impact and 4.9 percent of the national wage impact.

Alaska

Alaska is the premier cruise destination market in the United States. During 2018, Alaska ports received about 3.8 million port-of-call cruise passenger visits, approximately 61 percent of all port-of-call cruise passenger visits at U.S. ports. The state does have homeporting operations as well, and generated 198,000 embarkations on turnaround cruises between Alaska and Vancouver, Canada. The three busiest ports - consisting of Juneau, Ketchikan and Skagway - accounted for over 80 percent of all passenger visits to Alaska. Juneau accounted for 29 percent with just over 1.14 million visits, Ketchikan accounted for 27 percent with 1.05 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 2018 Cruise Industry Impacts – Alaska

	Alaska	Share of the U.S.
Passenger Embarkations	198,000	1.6%
Resident Cruise Passengers	16,000	0.1%
Total Passenger Visits & Crew Arrivals	5,646,000	21.0%
Direct Expenditures (\$ Millions)	\$ 1,242	5.2%
Total Employment Impact	22,447	5.3%
Total Wage Impact (\$ Millions)	\$ 1,156	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 2018. Thus, Alaska was a net importer of cruise passengers.

Relative to 2016, Alaska experienced a 26 percent increase in passenger embarkations and a 15 percent increase in cruise passenger visits and crew arrivals. Including homeport and transit

calls, cruising at Alaska ports generated 5.6 million passenger visits and crew arrivals,⁹ accounting for 21 percent of all passenger visits and crew arrivals in the U.S. These visits produced an estimated \$619 million in passenger and crew onshore spending, an 18 percent increase over 2016 and accounting for nearly \$110 per passenger visit and crew arrival.

Alaska ranked 5th in cruise industry direct expenditures with \$1.24 billion, or 5.2 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 \$788 million, approximately 63 percent of the industry's direct expenditures in Alaska.¹⁰ Another \$59 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 22,447 jobs and \$1.16 billion in income throughout the Alaska economy during 2018. These impacts accounted for 5.3 percent of national employment impact and 5.0 percent of the national wage impact.

⁹ 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.

¹⁰ Excludes the wages and salaries paid to cruise line employees in the state.

Washington

Washington has one major cruise port, Port of Seattle, which had 549,000 passenger embarkations during 2018, up 13 percent. Holland America Group has its headquarters in Washington. The Seattle cruises were 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 2018.

Table 16 – Summary of 2018 Cruise Industry Impacts – Washington

	Washington	Share of the U.S.
Passenger Embarkations	549,000	4.3%
Resident Cruise Passengers	302,000	2.3%
Total Passenger Visits & Crew Arrivals	806,000	3.0%
Direct Expenditures (\$ Millions)	\$ 837	3.5%
Total Employment Impact	19,189	4.6%
Total Wage Impact (\$ Millions)	\$ 1,082	4.7%

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

Cruise passengers sourced from Washington totaled 302,000 during 2018, 2.3 percent of U.S.-sourced passengers and a 17 percent increase from 2016 – making Washington a net importer of cruise passengers.

Combining passenger visits and crew arrivals, cruising from the Port of Seattle generated an estimated 806,000 passenger visits and crew arrivals, accounting for 3.0 percent of all passenger visits and crew arrivals in the United States. These visits produced an estimated \$48 million in passenger and crew onshore spending, or \$59 per passenger visit and crew arrival.

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 \$837 million, or 3.5 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 19,189 jobs and \$1.08 billion in income throughout the Washington economy during 2018. Employment and wage impacts accounted for 4.6 and 4.7 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 574,000 during 2018, 4.4 percent of U.S.-sourced passengers – up from 3.2 percent in 2016.

Table 17 – Summary of 2018 Cruise Industry Impacts – Georgia

Georgia	Share of the U.S.	
Passenger Embarkations	N.A.	N.A.
Resident Cruise Passengers	574,000	4.4%
Direct Expenditures (\$ Millions)	\$ 752	3.1%
Total Employment Impact	13,802	3.3%
Total Wage Impact (\$ Millions)	\$ 761	3.3%

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

Cruise industry expenditures in Georgia grew by 6.9 percent in 2018 to \$752 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 \$292 million. Another \$238 million or 32 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 13,802 jobs and \$761 million in income throughout the Georgia economy during 2018. Georgia’s total employment impact increased by 4.6 percent from 2016 as a result of the increase in direct spending while

the total wage impact grew by 7.3 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 325,000 during 2018, accounting for 2.5 percent of U.S.-sourced passengers.

Table 18 – Summary of 2018 Cruise Industry Impacts – Illinois

Illinois	Share of the U.S.	
Passenger Embarkations	N.A.	N.A.
Resident Cruise Passengers	325,000	2.5%
Direct Expenditures (\$ Millions)	\$ 590	2.5%
Total Employment Impact	8,761	2.1%
Total Wage Impact (\$ Millions)	\$ 555	2.4%

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

Cruise industry expenditures in Illinois increased to \$590 million, or 2.5 percent of the direct expenditures generated by the cruise industry in the United States in 2018. 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 \$122 million. Illinois makes a notable contribution to the cruise industry in the manufacturing sector. Approximately \$106 million, or 18 percent was spent with businesses in four manufacturing industries, food and beverage processors, paper and printing manufacturers, petroleum and coal product firms, and electrical equipment manufacturers. Another \$160 million, or 27 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 8,761 jobs and \$555 million in income throughout the Illinois economy during 2018. As a result of the increases in direct cruise expenditures in the state, Illinois' total employment impact increased by 7.0 percent from 2016 while the wage impact rose by 12 percent. These impacts accounted for 2.1 percent of national employment impact and 2.4 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 360,000 passenger embarkations during 2018, 2.8 percent of total U.S. embarkations and an increase of nearly 41 percent from 2016. Cape Liberty homeports ships from Royal Caribbean, Celebrity, TUI, Azamara and Silversea.

Table 19 – Summary of 2018 Cruise Industry Impacts – New Jersey

	New Jersey	Share of the U.S.
Passenger Embarkations	360,000	2.8%
Resident Cruise Passengers	396,000	3.0%
Total Passenger Visits & Crew Arrivals	513,000	1.9%
Direct Expenditures (\$ Millions)	\$ 530	2.2%
Total Employment Impact	9,649	2.3%
Total Wage Impact (\$ Millions)	\$ 584	2.5%

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

Cruise passengers sourced from New Jersey accounted for 3.0 percent of U.S.-sourced passengers and totaled 396,000 during 2018. Thus, New Jersey was a net exporter of cruise passengers. Relative to 2016, New Jersey experienced a 38 percent increase in the number of resident cruise passengers.

Cape Liberty generated an estimated 513,000 passenger visits and crew arrivals, accounting for 1.9 percent of all passenger visits and crew arrivals in the United States. These visits produced an estimated \$25.4 million in passenger and crew onshore spending in New Jersey, or about \$50 per passenger visit and crew arrival. Passenger and crew spending increased by over 40 percent from 2016.

Direct cruise industry expenditures rose by 18 percent to \$ 530 million, or 2.2 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 \$292 million,

55 percent of the industry's direct expenditures in New Jersey. Another \$140 million, 26 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 19 percent of direct 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 9,649 jobs and \$584 million in income throughout the New Jersey economy during 2018. These impacts accounted for 2.3 percent of national employment impact and 2.5 percent of the national wage impact. The employment impact rose by 14 percent, while the wage impact rose by 17 percent over 2016.

Louisiana

Louisiana is new to the top 10 in 2018 and 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. The Carnival Glory, Carnival Valor, and Norwegian Getaway are the predominant homeport ships that operate out of New Orleans. As a result, New Orleans saw 552,000 embarkations in 2018, 4.4 percent of the U.S. total and an increase of 3.3 percent from 2016.

Table 20 – Summary of 2018 Cruise Industry Impacts – Louisiana

Louisiana		Share of the U.S.
Passenger Embarkations	552,000	4.4%
Resident Cruise Passengers	212,000	1.6%
Total Passenger Visits & Crew Arrivals	794,000	3.0%
Direct Expenditures (\$ Millions)	\$ 477	2.0%
Total Employment Impact	8,966	2.1%
Total Wage Impact (\$ Millions)	\$ 386	1.7%

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 212,000 during 2018. Thus, Louisiana was a net importer of cruise passengers. Relative to 2016, Louisiana experienced a 18 percent increase in the number of resident cruise passengers.

New Orleans generated an estimated 794,000 passenger visits and crew arrivals, accounting for 3.0 percent of all passenger visits and crew arrivals in the United States. This was a 3.3 percent increase from 2016. These visits produced an estimated \$129 million in passenger and crew onshore spending in Louisiana, or about \$162 per passenger visit and crew arrival. Passenger and crew spending increased by about 15 percent from 2016.

Direct cruise industry expenditures rose by 10 percent to \$477 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 \$305 million,

64 percent of the industry's direct expenditures in Louisiana. Another \$90 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 17 percent of 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 8,966 jobs and \$386 million in income throughout the Louisiana economy during 2018. These impacts accounted for 2.1 percent of national employment impact and 1.7 percent of the national wage impact. The employment impact rose by 7.8 percent while the wage impact rose by 11 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 2018 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 24 percent of the cruise industry's direct expenditures in 2018 up from 22 percent in 2016. Most of the states outside of the top ten are source markets for cruise passengers and vendor goods and services. Some states, such as Hawaii, Massachusetts, Maryland, and South Carolina, have cruise operations, as well. These four states ranked 12th, 14th, 18th and 26th respectively in terms of direct industry expenditures during 2018.

Since 2010 passenger volumes in Hawaii had been slowly declining before increasing in 2018. Passenger embarkations reached over 124,300 in 2018 which is only slightly higher (+1.2%) than in 2010. In Massachusetts, the Port of Boston had about 119,800 embarkations, the Port of Baltimore in Maryland reported 218,900 embarkations, and the Port of Charleston in South Carolina showed to have accommodated about 203,100 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, 2018

State	2018	2016	Direct Purchases (\$ Millions)	Share of the U.S.	Total Employment	Share of the U.S.	Total Income (\$ Millions)	Share of the U.S.	Average Annual Wage (\$1,000)
Florida	1	1	\$ 8,485	35.4%	154,646	36.7%	\$ 7,689	33.2%	\$ 46.5
California	2	2	\$ 2,501	10.4%	49,369	11.7%	\$ 3,260	14.1%	\$ 59.2
Texas	3	3	\$ 1,511	6.3%	26,241	6.2%	\$ 1,749	7.6%	\$ 57.2
New York	4	4	\$ 1,295	5.4%	17,240	4.1%	\$ 1,123	4.9%	\$ 58.6
Alaska	5	5	\$ 1,242	5.2%	22,447	5.3%	\$ 1,156	5.0%	\$ 45.7
Washington	6	6	\$ 837	3.5%	19,189	4.6%	\$ 1,082	4.7%	\$ 51.3
Georgia	7	7	\$ 752	3.1%	13,802	3.3%	\$ 761	3.3%	\$ 51.3
Illinois	8	8	\$ 590	2.5%	8,761	2.1%	\$ 555	2.4%	\$ 58.6
New Jersey	9	10	\$ 530	2.2%	9,649	2.3%	\$ 584	2.5%	\$ 56.7
Louisiana	10	11	\$ 477	2.0%	8,966	2.1%	\$ 386	1.7%	\$ 39.7
Pennsylvania	11	12	\$ 450	1.9%	7,086	1.7%	\$ 420	1.8%	\$ 55.7
Hawaii	12	14	\$ 445	1.9%	6,732	1.6%	\$ 246	1.1%	\$ 35.4
Colorado	13	13	\$ 410	1.7%	2,727	0.6%	\$ 172	0.7%	\$ 57.2
Massachusetts	14	9	\$ 393	1.6%	6,031	1.4%	\$ 428	1.8%	\$ 61.3
Indiana	15	15	\$ 354	1.5%	8,304	2.0%	\$ 429	1.9%	\$ 48.5
North Carolina	16	16	\$ 307	1.3%	4,387	1.0%	\$ 213	0.9%	\$ 46.7
Michigan	17	17	\$ 291	1.2%	3,679	0.9%	\$ 217	0.9%	\$ 55.7
Maryland	18	19	\$ 260	1.1%	4,471	1.1%	\$ 253	1.1%	\$ 53.6
Arizona	19	18	\$ 247	1.0%	4,088	1.0%	\$ 187	0.8%	\$ 43.5
Ohio	20	20	\$ 244	1.0%	4,569	1.1%	\$ 231	1.0%	\$ 47.5
Virginia	21	22	\$ 238	1.0%	3,563	0.8%	\$ 217	0.9%	\$ 57.1
Connecticut	22	21	\$ 206	0.9%	1,585	0.4%	\$ 135	0.6%	\$ 76.3
Oregon	23	24	\$ 196	0.8%	5,151	1.2%	\$ 252	1.1%	\$ 45.5
Alabama	24	28	\$ 185	0.8%	2,869	0.7%	\$ 135	0.6%	\$ 43.3
Missouri	25	23	\$ 172	0.7%	3,752	0.9%	\$ 197	0.9%	\$ 48.1
South Carolina	26	25	\$ 170	0.7%	3,375	0.8%	\$ 136	0.6%	\$ 37.7
Minnesota	27	26	\$ 133	0.6%	2,364	0.6%	\$ 144	0.6%	\$ 57.1
Tennessee	28	29	\$ 115	0.5%	1,925	0.5%	\$ 92	0.4%	\$ 44.4
Nevada	29	27	\$ 108	0.5%	1,491	0.4%	\$ 72	0.3%	\$ 44.4
Wisconsin	30	32	\$ 74	0.3%	1,175	0.3%	\$ 55	0.2%	\$ 44.6
Maine	31	33	\$ 73	0.3%	1,077	0.3%	\$ 39	0.2%	\$ 34.1
Kentucky	32	30	\$ 70	0.3%	1,545	0.4%	\$ 70	0.3%	\$ 41.9
Kansas	33	34	\$ 62	0.3%	1,875	0.4%	\$ 90	0.4%	\$ 44.2
Utah	34	36	\$ 59	0.2%	1,290	0.3%	\$ 56	0.2%	\$ 40.0
Oklahoma	35	39	\$ 53	0.2%	1,000	0.2%	\$ 45	0.2%	\$ 42.5
Dist. of Columbia	36	35	\$ 52	0.2%	319	0.1%	\$ 47	0.2%	\$ 129.0
Mississippi	37	38	\$ 50.4	0.2%	695	0.2%	\$ 27	0.1%	\$ 37.1
Iowa	38	37	\$ 49	0.2%	429	0.1%	\$ 19	0.1%	\$ 41.7
Arkansas	39	40	\$ 39	0.2%	687	0.2%	\$ 26	0.1%	\$ 35.1
New Hampshire	40	31	\$ 36	0.2%	387	0.1%	\$ 23	0.1%	\$ 51.7
Delaware	41	41	\$ 35	0.1%	279	0.1%	\$ 17	0.1%	\$ 54.8
Nebraska	42	42	\$ 30	0.1%	552	0.1%	\$ 27	0.1%	\$ 43.8
Rhode Island	43	43	\$ 30	0.1%	426	0.1%	\$ 19	0.1%	\$ 40.9
New Mexico	44	44	\$ 21	0.1%	301	0.1%	\$ 15	0.1%	\$ 45.4
Idaho	45	45	\$ 19	0.1%	327	0.1%	\$ 14	0.1%	\$ 40.5
West Virginia	46	47	\$ 15	0.1%	292	0.1%	\$ 12	0.1%	\$ 37.4
Vermont	47	46	\$ 15	0.1%	99	0.0%	\$ 6	0.0%	\$ 48.6
North Dakota	48	48	\$ 10	0.0%	196	0.0%	\$ 7	0.0%	\$ 34.8
Montana	49	50	\$ 8	0.0%	130	0.0%	\$ 6	0.0%	\$ 36.4
South Dakota	50	49	\$ 8	0.0%	113	0.0%	\$ 4	0.0%	\$ 35.9
Wyoming	51	51	\$ 4	0.0%	58	0.0%	\$ 3	0.0%	\$ 43.4
U. S. Total			\$ 23,955		421,711		\$ 23,151		\$ 54.9

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 obtained from 19 cruise lines. Combined, these cruise lines¹¹ accounted for over 95 percent of the industry's U.S. passengers. 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 \$23.95 billion on goods and services in the United States. Of this total, \$11.74 billion represented direct payments by the cruise lines to U.S. suppliers for operating and administrative goods and services. The remaining \$12.21 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 2018, 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 2018 were allocated to the corresponding industries in each state.

The \$12.21 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 2018, the cruise industry spent \$4.17 billion for port services and wages of their U.S.-resident employees. The \$1.51 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 \$2.66 billion in U.S. port service expenditures were

¹¹ These cruise lines were: AIDA Cruises, Carnival Cruise Line, Celebrity Cruises, Costa, Cunard Line, Disney Cruise Line, Hapag-Lloyd, Holland America Line, Norwegian Cruise Line, Oceania, P&O Cruises, Paul Gauguin Cruises, Princess Cruises, Regent, Royal Caribbean International, Seabourn, and TUI Cruise Lines

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.

allocated to each state based upon its share of U.S. passenger visits and crew arrivals. For example, Florida, which accounted for 46 percent of total passenger visits and crew arrivals to U.S. ports, was allocated about \$1.22 billion in port service spending.

The \$2.33 billion in air transportation expenditures was split in half, one-half representing the origination of air travel and the other half representing the destination of air travel. 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 3.1 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 2.8 percent of U.S. cruise embarkations and thus was allocated another \$33 million for the destination component of air travel spending. Thus, New Jersey received a total allocation of approximately \$69 million in direct air transportation expenditures, 3.0 percent of national expenditures for air transportation generated by the international cruise industry.

The \$3.32 billion in U.S. transportation services expenditures consists of \$788 million in expenditures for passenger shore excursions and \$2.53 billion for travel agent commissions and other miscellaneous ground transportation services, such as bus service between airports and cruise terminals. Since these 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 9.3 percent of U.S.-resident cruise passengers, was allocated approximately \$234 million of the \$2.53 billion in transportation service expenditures. The separate allocation of the \$788 million in expenditures for shore excursions is discussed below.

Finally, the \$2.40 billion in passenger and crew spending and the \$788 million in 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 Everglades, Port of Miami, Port of New Orleans, Port of New York, Port of Tampa, Port of San Diego,

Port of Los Angeles 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

For example, survey data representing the five embarkation cruise ports in Florida indicated that 43.9 percent of embarking cruise passengers stayed one or more nights in the port city and that these passengers spent an average of about \$246 during their stay. Thus, 3.3 million (0.439 x 7.5 million) cruise passengers were estimated to have spent \$810 million on lodging, food, entertainment, etc. in Florida during 2018¹⁴. The remaining 4.2 million Florida cruise passengers (day of cruise arrivals) spent an average of \$36 per passenger for a total of \$150 million. An estimated 1.2 million passengers visited Florida ports as port-of-call or transit passengers. These passengers spent an average of \$73 per visit, resulting in total expenditures of approximately \$86 million. Finally, crew who went ashore spent an average of \$104 on each call to a Florida port. An estimated 1.65 million crew disembarked cruise ships and visited Florida during 2018 and spent \$171 million. Thus, we have estimated that passengers and crew spent approximately \$1.22 billion in Florida during 2018, 51 percent of total passenger and crew spending (excluding travel) in the United States.

By comparison, passengers and crew were estimated to have spent \$151 million (6 percent of total U.S. spending by passengers and crew) in California during 2018. Approximately 32 percent, or \$48 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 \$161.

Alaska received an estimated 3.96 million cruise passenger visits during 2018. This includes approximately 198,000 passengers who either embarked or disembarked on their cruise in Alaska. Cruise passengers spent an average of \$154 per visit. Thus, we have estimated that \$610 million was spent by cruise passengers visiting Alaska ports. An estimated 758,000 onshore crew visits generated another \$8.5 million, or \$11 per visit. Thus, cruise passengers

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.

¹⁴ Financial data adjusted for inflation from year of reference

and crew spent a total of \$618 million in Alaska, accounting for 26 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 \$23.95 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.

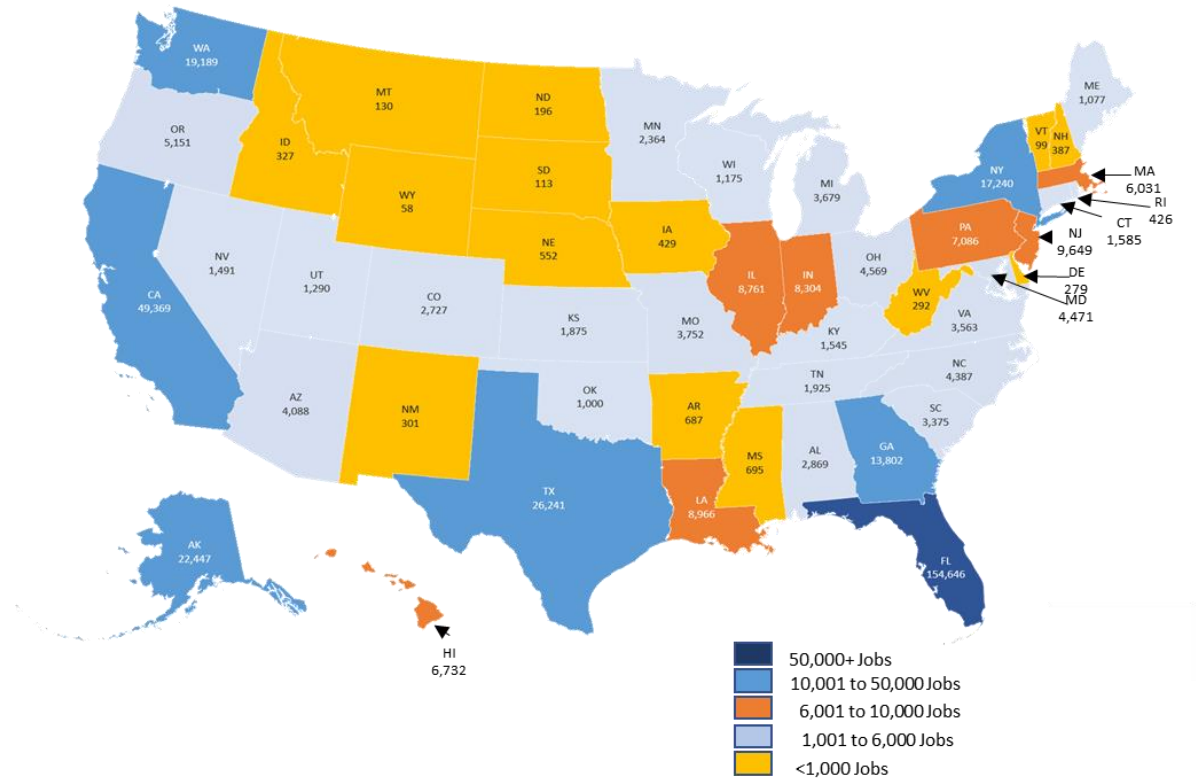
The industry direct expenditure data in each state was then converted to value-added using national ratios of value-added to output for each industry. Using industry- and state-specific ratios of compensation-to-value-added, implied compensation in each industry and state was estimated for the direct 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 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.

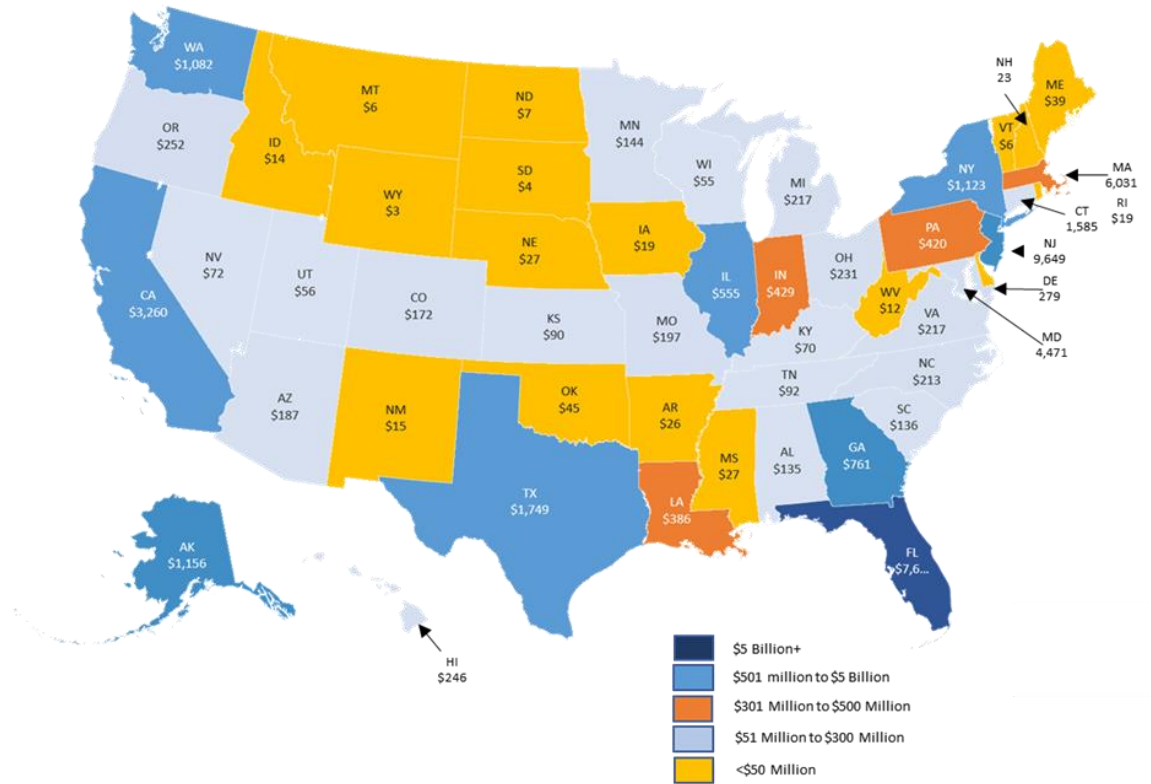
Appendix II – Individual State Tables

Figure 10 – Total Employment Impact of the International Cruise Industry by State – 2018 (Thousands)



Source: Business Research and Economic Advisors

Figure 11 – Total Income Impact of the International Cruise Industry by State – 2018 (\$ Millions)



Source: Business Research and Economic Advisors

Table 22 – Total Economic Impacts – Alabama - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	48	\$ 4,375
Manufacturing	\$ 54,678	374	\$ 23,983
Nondurable Goods	\$ 24,810	179	\$ 14,497
Durable Goods	\$ 29,868	195	\$ 9,486
Wholesale & Retail Trade	\$ 9,200	204	\$ 9,050
Transportation	\$ 58,690	467	\$ 19,757
Information Services	\$ 1	11	\$ 832
Finance, Insurance, Real Estate & Leasing	\$ 7,610	63	\$ 4,609
Services & Government	\$ 54,973	1,701	\$ 72,294
Professional, Scientific & Technical Services	\$ 12,796	220	\$ 20,485
Administrative & Waste Management Services	\$ 33,208	833	\$ 30,412
Health, Education & Social Services	\$ -	210	\$ 9,223
Other Services & Government	\$ 8,968	438	\$ 12,175
Total	\$ 185,152	\$ 2,869	\$ 134,901

Source: Business Research and Economic Advisors

Table 23 – Total Economic Impacts – Alaska - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 6,855	1,524	\$ 258,793
Manufacturing	\$ 60,347	394	\$ 23,999
Nondurable Goods	\$ 48,120	87	\$ 6,226
Durable Goods	\$ 12,227	307	\$ 17,773
Wholesale & Retail Trade	\$ 128,098	1,904	\$ 73,497
Transportation	\$ 516,475	7,422	\$ 400,275
Information Services	\$ 2,652	82	\$ 5,212
Finance, Insurance, Real Estate & Leasing	\$ 3,080	133	\$ 7,985
Services & Government	\$ 524,848	10,989	\$ 386,287
Professional, Scientific & Technical Services	\$ 19,394	704	\$ 52,469
Administrative & Waste Management Services	\$ 22,858	970	\$ 45,797
Health, Education & Social Services	\$ 3,283	83	\$ 3,586
Other Services & Government	\$ 479,314	9,231	\$ 284,434
Total	\$ 1,242,355	22,447	\$ 1,156,048

Source: Business Research and Economic Advisors

Table 24 – Total Economic Impacts – Arizona - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	109	\$ 6,970
Manufacturing	\$ 5,645	167	\$ 13,049
Nondurable Goods	\$ 1,287	133	\$ 11,345
Durable Goods	\$ 4,358	34	\$ 1,704
Wholesale & Retail Trade	\$ 941	123	\$ 8,083
Transportation	\$ 30,465	233	\$ 16,859
Information Services	\$ 25,489	106	\$ 7,328
Finance, Insurance, Real Estate & Leasing	\$ 16,410	202	\$ 11,300
Services & Government	\$ 168,311	3,148	\$ 123,872
Professional, Scientific & Technical Services	\$ 25,654	440	\$ 30,910
Administrative & Waste Management Services	\$ 134,349	2,221	\$ 79,212
Health, Education & Social Services	\$ 402	22	\$ 1,121
Other Services & Government	\$ 7,906	465	\$ 12,629
Total	\$ 247,262	4,088	\$ 187,460

Source: Business Research and Economic Advisors

Table 25 – Total Economic Impacts – Arkansas - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	9	\$ 548
Manufacturing	\$ 5,901	77	\$ 3,353
Nondurable Goods	\$ 5,851	19	\$ 1,090
Durable Goods	\$ 50	58	\$ 2,264
Wholesale & Retail Trade	\$ 12	23	\$ 791
Transportation	\$ 8,244	41	\$ 3,065
Information Services	\$ 2	2	\$ 101
Finance, Insurance, Real Estate & Leasing	\$ 2,993	17	\$ 890
Services & Government	\$ 21,675	518	\$ 17,602
Professional, Scientific & Technical Services	\$ 5,876	55	\$ 4,245
Administrative & Waste Management Services	\$ 15,741	382	\$ 10,950
Health, Education & Social Services	\$ 1	40	\$ 1,412
Other Services & Government	\$ 56	40	\$ 996
Total	\$ 38,827	687	\$ 26,350

Source: Business Research and Economic Advisors

Table 26 – Total Economic Impacts – California - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 549	2,093	\$ 197,720
Manufacturing	\$ 605,418	5,175	\$ 459,913
Nondurable Goods	\$ 460,446	3,156	\$ 315,752
Durable Goods	\$ 144,972	2,019	\$ 144,162
Wholesale & Retail Trade	\$ 114,223	2,988	\$ 206,549
Transportation	\$ 426,142	5,649	\$ 268,269
Information Services	\$ 28,409	956	\$ 139,480
Finance, Insurance, Real Estate & Leasing	\$ 88,077	3,551	\$ 290,953
Services & Government	\$ 1,238,649	28,957	\$ 1,697,494
Professional, Scientific & Technical Services	\$ 347,308	8,313	\$ 870,738
Administrative & Waste Management Services	\$ 507,878	10,816	\$ 460,914
Health, Education & Social Services	\$ 16,206	563	\$ 28,220
Other Services & Government	\$ 367,257	9,265	\$ 337,622
Total	\$ 2,501,467	49,369	\$ 3,260,377

Source: Business Research and Economic Advisors

Table 27 – Total Economic Impacts – Colorado - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 1	44	\$ 6,067
Manufacturing	\$ 264,617	202	\$ 21,201
Nondurable Goods	\$ 247,537	107	\$ 11,328
Durable Goods	\$ 17,081	95	\$ 9,873
Wholesale & Retail Trade	\$ 51,167	312	\$ 21,771
Transportation	\$ 22,346	242	\$ 15,489
Information Services	\$ 960	24	\$ 2,641
Finance, Insurance, Real Estate & Leasing	\$ 10,373	176	\$ 13,330
Services & Government	\$ 60,287	1,728	\$ 91,401
Professional, Scientific & Technical Services	\$ 26,759	303	\$ 35,085
Administrative & Waste Management Services	\$ 25,891	913	\$ 38,767
Health, Education & Social Services	\$ 28	189	\$ 7,930
Other Services & Government	\$ 7,608	323	\$ 9,619
Total	\$ 409,752	2,727	\$ 171,900

Source: Business Research and Economic Advisors

Table 28 – Total Economic Impacts – Connecticut - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 0	12	\$ 1,508
Manufacturing	\$ 85,548	280	\$ 31,684
Nondurable Goods	\$ 3,913	234	\$ 27,563
Durable Goods	\$ 81,635	46	\$ 4,121
Wholesale & Retail Trade	\$ 1,618	98	\$ 5,723
Transportation	\$ 11,751	58	\$ 4,666
Information Services	\$ 3,638	11	\$ 1,212
Finance, Insurance, Real Estate & Leasing	\$ 37,329	109	\$ 16,190
Services & Government	\$ 66,061	1,016	\$ 74,030
Professional, Scientific & Technical Services	\$ 39,440	263	\$ 37,308
Administrative & Waste Management Services	\$ 22,074	344	\$ 17,969
Health, Education & Social Services	\$ 995	237	\$ 12,474
Other Services & Government	\$ 3,553	172	\$ 6,278
Total	\$ 205,946	1,585	\$ 135,013

Source: Business Research and Economic Advisors

Table 29 – Total Economic Impacts – Delaware - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	2	\$ 148
Manufacturing	\$ 825	14	\$ 903
Nondurable Goods	\$ 585	4	\$ 369
Durable Goods	\$ 239	10	\$ 534
Wholesale & Retail Trade	\$ 55	11	\$ 475
Transportation	\$ 3,055	8	\$ 906
Information Services	\$ -	1	\$ 127
Finance, Insurance, Real Estate & Leasing	\$ 15,970	15	\$ 1,334
Services & Government	\$ 14,640	228	\$ 12,658
Professional, Scientific & Technical Services	\$ 5,646	51	\$ 5,543
Administrative & Waste Management Services	\$ 7,902	126	\$ 5,327
Health, Education & Social Services	\$ -	19	\$ 883
Other Services & Government	\$ 1,092	32	\$ 905
Total	\$ 34,545	279	\$ 16,550

Source: Business Research and Economic Advisors

Table 30 – Total Economic Impacts – District of Columbia - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	1	\$ 91
Manufacturing	\$ 29	1	\$ 112
Nondurable Goods	\$ 25	-	\$ 44
Durable Goods	\$ 4	1	\$ 68
Wholesale & Retail Trade	\$ 1	2	\$ 116
Transportation	\$ 3,695	8	\$ 1,171
Information Services	\$ 1	1	\$ 230
Finance, Insurance, Real Estate & Leasing	\$ 1,925	24	\$ 3,836
Services & Government	\$ 46,809	281	\$ 41,171
Professional, Scientific & Technical Services	\$ 17,619	86	\$ 14,098
Administrative & Waste Management Services	\$ 7,049	111	\$ 6,804
Health, Education & Social Services	\$ 177	25	\$ 1,542
Other Services & Government	\$ 21,964	59	\$ 18,728
Total	\$ 52,460	319	\$ 46,728

Source: Business Research and Economic Advisors

Table 31 – Total Economic Impacts – Florida – 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 18,715	4,267	\$ 277,459
Manufacturing	\$ 1,867,372	11,714	\$ 799,784
Nondurable Goods	\$ 1,049,067	8,287	\$ 584,867
Durable Goods	\$ 818,304	3,427	\$ 214,917
Wholesale & Retail Trade	\$ 441,726	9,419	\$ 546,133
Transportation	\$ 2,758,826	33,697	\$ 1,662,477
Information Services	\$ 109,118	2,032	\$ 163,644
Finance, Insurance, Real Estate & Leasing	\$ 55,575	9,767	\$ 616,393
Services & Government	\$ 3,233,681	83,751	\$ 3,623,102
Professional, Scientific & Technical Services	\$ 399,960	15,891	\$ 1,273,418
Administrative & Waste Management Services	\$ 1,221,241	32,488	\$ 1,230,719
Health, Education & Social Services	\$ 22,842	1,119	\$ 51,362
Other Services & Government	\$ 1,589,638	34,253	\$ 1,067,603
Total	\$ 8,485,013	154,646	\$ 7,688,990

Source: Business Research and Economic Advisors

Table 32 – Total Economic Impacts – Georgia - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 400	428	\$ 26,414
Manufacturing	\$ 160,475	1,428	\$ 96,887
Nondurable Goods	\$ 93,724	760	\$ 54,085
Durable Goods	\$ 66,751	668	\$ 42,802
Wholesale & Retail Trade	\$ 19,531	669	\$ 46,761
Transportation	\$ 160,106	1,685	\$ 81,376
Information Services	\$ 9,081	249	\$ 21,853
Finance, Insurance, Real Estate & Leasing	\$ 39,353	1,599	\$ 102,124
Services & Government	\$ 362,680	7,744	\$ 385,626
Professional, Scientific & Technical Services	\$ 69,009	1,618	\$ 116,278
Administrative & Waste Management Services	\$ 127,617	2,683	\$ 100,764
Health, Education & Social Services	\$ 3,528	136	\$ 5,874
Other Services & Government	\$ 162,526	3,307	\$ 162,709
Total	\$ 751,625	13,802	\$ 761,041

Source: Business Research and Economic Advisors

Table 33 – Total Economic Impacts – Hawaii - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 11	12	\$ 1,006
Manufacturing	\$ 23,863	89	\$ 4,701
Nondurable Goods	\$ 19,264	33	\$ 2,250
Durable Goods	\$ 4,599	56	\$ 2,451
Wholesale & Retail Trade	\$ 14,607	138	\$ 6,304
Transportation	\$ 215,549	2,444	\$ 70,295
Information Services	\$ 74	5	\$ 325
Finance, Insurance, Real Estate & Leasing	\$ 2,437	20	\$ 1,344
Services & Government	\$ 188,163	4,024	\$ 162,163
Professional, Scientific & Technical Services	\$ 4,033	58	\$ 4,872
Administrative & Waste Management Services	\$ 7,750	1,706	\$ 66,509
Health, Education & Social Services	\$ 38	7	\$ 224
Other Services & Government	\$ 176,342	2,252	\$ 90,559
Total	\$ 444,705	6,732	\$ 246,138

Source: Business Research and Economic Advisors

Table 34 – Total Economic Impacts – Idaho - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	7	\$ 387
Manufacturing	\$ 1,193	22	\$ 1,265
Nondurable Goods	\$ 1,091	8	\$ 661
Durable Goods	\$ 102	14	\$ 605
Wholesale & Retail Trade	\$ 39	16	\$ 511
Transportation	\$ 3,170	20	\$ 1,128
Information Services	\$ 99	1	\$ 56
Finance, Insurance, Real Estate & Leasing	\$ 1,766	9	\$ 517
Services & Government	\$ 12,768	251	\$ 10,159
Professional, Scientific & Technical Services	\$ 6,574	57	\$ 4,165
Administrative & Waste Management Services	\$ 6,026	140	\$ 4,502
Health, Education & Social Services	\$ -	22	\$ 734
Other Services & Government	\$ 168	32	\$ 758
Total	\$ 19,037	327	\$ 14,024

Source: Business Research and Economic Advisors

Table 35 – Total Economic Impacts – Illinois - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 3	214	\$ 20,921
Manufacturing	\$ 192,991	1,532	\$ 125,118
Nondurable Goods	\$ 103,314	981	\$ 81,196
Durable Goods	\$ 89,677	551	\$ 43,922
Wholesale & Retail Trade	\$ 27,456	544	\$ 42,169
Transportation	\$ 38,515	725	\$ 42,926
Information Services	\$ 38,088	229	\$ 23,597
Finance, Insurance, Real Estate & Leasing	\$ 68,378	670	\$ 53,612
Services & Government	\$ 224,816	4,846	\$ 246,717
Professional, Scientific & Technical Services	\$ 125,039	1,514	\$ 125,519
Administrative & Waste Management Services	\$ 87,142	2,204	\$ 84,736
Health, Education & Social Services	\$ 1,647	93	\$ 4,874
Other Services & Government	\$ 10,989	1,034	\$ 31,589
Total	\$ 590,248	8,761	\$ 555,060

Source: Business Research and Economic Advisors

Table 36 – Total Economic Impacts – Indiana - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 0	79	\$ 6,138
Manufacturing	\$ 7,250	922	\$ 65,616
Nondurable Goods	\$ 5,286	605	\$ 46,265
Durable Goods	\$ 1,964	317	\$ 19,351
Wholesale & Retail Trade	\$ 432	521	\$ 18,801
Transportation	\$ 16,452	312	\$ 18,548
Information Services	\$ 436	29	\$ 1,965
Finance, Insurance, Real Estate & Leasing	\$ 16,163	180	\$ 12,068
Services & Government	\$ 313,510	6,262	\$ 305,762
Professional, Scientific & Technical Services	\$ 14,016	515	\$ 42,562
Administrative & Waste Management Services	\$ 30,653	907	\$ 31,047
Health, Education & Social Services	\$ 3,873	889	\$ 35,306
Other Services & Government	\$ 264,969	3,951	\$ 196,847
Total	\$ 354,242	8,304	\$ 428,898

Source: Business Research and Economic Advisors

Table 37 – Total Economic Impacts – Iowa - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 0	3	\$ 204
Manufacturing	\$ 6,364	39	\$ 2,247
Nondurable Goods	\$ 6,358	10	\$ 752
Durable Goods	\$ 5	29	\$ 1,495
Wholesale & Retail Trade	\$ 2	16	\$ 530
Transportation	\$ 5,210	21	\$ 1,348
Information Services	\$ 35	2	\$ 113
Finance, Insurance, Real Estate & Leasing	\$ 21,344	42	\$ 3,036
Services & Government	\$ 15,729	306	\$ 11,087
Professional, Scientific & Technical Services	\$ 5,458	40	\$ 2,618
Administrative & Waste Management Services	\$ 9,750	209	\$ 6,913
Health, Education & Social Services	\$ -	27	\$ 911
Other Services & Government	\$ 521	29	\$ 646
Total	\$ 48,685	429	\$ 18,565

Source: Business Research and Economic Advisors

Table 38 – Total Economic Impacts – Kansas - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 205	41	\$ 2,891
Manufacturing	\$ 5,755	223	\$ 12,799
Nondurable Goods	\$ 2,821	124	\$ 7,843
Durable Goods	\$ 2,935	99	\$ 4,956
Wholesale & Retail Trade	\$ 125	124	\$ 4,537
Transportation	\$ 23,611	453	\$ 24,022
Information Services	\$ 2	16	\$ 1,331
Finance, Insurance, Real Estate & Leasing	\$ 7,816	72	\$ 4,517
Services & Government	\$ 24,250	946	\$ 39,548
Professional, Scientific & Technical Services	\$ 9,516	182	\$ 13,531
Administrative & Waste Management Services	\$ 12,652	311	\$ 12,152
Health, Education & Social Services	\$ 1,840	213	\$ 7,964
Other Services & Government	\$ 243	240	\$ 5,901
Total	\$ 61,766	1,875	\$ 89,645

Source: Business Research and Economic Advisors

Table 39 – Total Economic Impacts – Kentucky - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	19	\$ 1,214
Manufacturing	\$ 13,486	129	\$ 7,482
Nondurable Goods	\$ 12,927	55	\$ 3,873
Durable Goods	\$ 560	73	\$ 3,609
Wholesale & Retail Trade	\$ 898	76	\$ 2,799
Transportation	\$ 10,698	86	\$ 6,453
Information Services	\$ 134	7	\$ 420
Finance, Insurance, Real Estate & Leasing	\$ 6,805	36	\$ 2,597
Services & Government	\$ 38,168	1,191	\$ 49,294
Professional, Scientific & Technical Services	\$ 10,529	286	\$ 22,095
Administrative & Waste Management Services	\$ 20,423	515	\$ 15,851
Health, Education & Social Services	\$ -	124	\$ 4,665
Other Services & Government	\$ 7,216	266	\$ 6,683
Total	\$ 70,189	1,545	\$ 70,258

Source: Business Research and Economic Advisors

Table 40 – Total Economic Impacts – Louisiana - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 21	826	\$ 79,078
Manufacturing	\$ 53,871	526	\$ 41,481
Nondurable Goods	\$ 28,575	297	\$ 19,024
Durable Goods	\$ 25,297	229	\$ 22,458
Wholesale & Retail Trade	\$ 19,341	481	\$ 22,018
Transportation	\$ 128,081	1,820	\$ 60,439
Information Services	\$ 29	53	\$ 3,202
Finance, Insurance, Real Estate & Leasing	\$ 7,408	231	\$ 12,582
Services & Government	\$ 268,429	5,030	\$ 167,494
Professional, Scientific & Technical Services	\$ 16,945	631	\$ 40,756
Administrative & Waste Management Services	\$ 74,412	1,231	\$ 41,184
Health, Education & Social Services	\$ 4,181	132	\$ 4,896
Other Services & Government	\$ 172,890	3,037	\$ 80,658
Total	\$ 477,181	8,966	\$ 386,292

Source: Business Research and Economic Advisors

Table 41 – Total Economic Impacts – Maine - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	24	\$ 1,155
Manufacturing	\$ 12,085	83	\$ 4,936
Nondurable Goods	\$ 1,239	47	\$ 2,803
Durable Goods	\$ 10,846	36	\$ 2,133
Wholesale & Retail Trade	\$ 13,106	171	\$ 6,679
Transportation	\$ 13,511	102	\$ 3,980
Information Services	\$ 138	5	\$ 364
Finance, Insurance, Real Estate & Leasing	\$ 3,593	30	\$ 2,068
Services & Government	\$ 30,735	663	\$ 20,089
Professional, Scientific & Technical Services	\$ 2,556	59	\$ 4,073
Administrative & Waste Management Services	\$ 8,436	106	\$ 3,899
Health, Education & Social Services	\$ 45	6	\$ 210
Other Services & Government	\$ 19,697	493	\$ 11,908
Total	\$ 73,168	1,077	\$ 39,271

Source: Business Research and Economic Advisors

Table 42 – Total Economic Impacts – Maryland - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	37	\$ 3,235
Manufacturing	\$ 41,619	243	\$ 18,509
Nondurable Goods	\$ 30,284	106	\$ 10,599
Durable Goods	\$ 11,335	138	\$ 7,910
Wholesale & Retail Trade	\$ 13,241	323	\$ 15,179
Transportation	\$ 60,967	619	\$ 27,277
Information Services	\$ 8,031	31	\$ 3,289
Finance, Insurance, Real Estate & Leasing	\$ 13,905	214	\$ 18,287
Services & Government	\$ 122,569	3,004	\$ 167,626
Professional, Scientific & Technical Services	\$ 38,536	600	\$ 61,904
Administrative & Waste Management Services	\$ 52,391	1,028	\$ 46,652
Health, Education & Social Services	\$ 17,021	674	\$ 33,508
Other Services & Government	\$ 14,622	701	\$ 25,562
Total	\$ 260,332	4,471	\$ 253,402

Source: Business Research and Economic Advisors

Table 43 – Total Economic Impacts – Massachusetts - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	70	\$ 6,234
Manufacturing	\$ 38,353	362	\$ 34,387
Nondurable Goods	\$ 16,239	215	\$ 24,651
Durable Goods	\$ 22,114	147	\$ 9,736
Wholesale & Retail Trade	\$ 9,202	248	\$ 16,917
Transportation	\$ 47,187	571	\$ 22,307
Information Services	\$ 5,001	92	\$ 10,810
Finance, Insurance, Real Estate & Leasing	\$ 24,946	1,225	\$ 129,594
Services & Government	\$ 268,012	3,462	\$ 207,433
Professional, Scientific & Technical Services	\$ 137,727	1,081	\$ 106,904
Administrative & Waste Management Services	\$ 107,700	1,183	\$ 58,005
Health, Education & Social Services	\$ 4,103	157	\$ 8,476
Other Services & Government	\$ 18,482	1,041	\$ 34,048
Total	\$ 392,701	6,031	\$ 427,682

Source: Business Research and Economic Advisors

Table 44 – Total Economic Impacts – Michigan - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 0	32	\$ 2,668
Manufacturing	\$ 88,974	445	\$ 32,475
Nondurable Goods	\$ 71,569	234	\$ 19,533
Durable Goods	\$ 17,405	211	\$ 12,942
Wholesale & Retail Trade	\$ 17,503	260	\$ 13,343
Transportation	\$ 27,397	138	\$ 12,041
Information Services	\$ 1,102	14	\$ 1,156
Finance, Insurance, Real Estate & Leasing	\$ 23,268	134	\$ 9,740
Services & Government	\$ 132,762	2,656	\$ 145,572
Professional, Scientific & Technical Services	\$ 51,173	557	\$ 60,461
Administrative & Waste Management Services	\$ 52,969	980	\$ 44,918
Health, Education & Social Services	\$ 206	335	\$ 14,162
Other Services & Government	\$ 28,413	785	\$ 26,031
Total	\$ 291,007	3,679	\$ 216,995

Source: Business Research and Economic Advisors

Table 45 – Total Economic Impacts – Minnesota - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	23	\$ 1,945
Manufacturing	\$ 20,304	232	\$ 17,146
Nondurable Goods	\$ 16,329	116	\$ 9,986
Durable Goods	\$ 3,975	117	\$ 7,160
Wholesale & Retail Trade	\$ 1,624	151	\$ 6,984
Transportation	\$ 15,571	137	\$ 9,395
Information Services	\$ 3,567	20	\$ 1,912
Finance, Insurance, Real Estate & Leasing	\$ 21,734	218	\$ 18,845
Services & Government	\$ 69,913	1,583	\$ 87,898
Professional, Scientific & Technical Services	\$ 19,749	315	\$ 34,897
Administrative & Waste Management Services	\$ 23,603	484	\$ 19,885
Health, Education & Social Services	\$ 70	272	\$ 11,152
Other Services & Government	\$ 26,491	512	\$ 21,964
Total	\$ 132,714	2,364	\$ 144,124

Source: Business Research and Economic Advisors

Table 46 – Total Economic Impacts – Mississippi - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	\$ 11	\$ 735
Manufacturing	\$ 18,530	\$ 109	\$ 5,807
Nondurable Goods	\$ 1,929	\$ 75	\$ 4,591
Durable Goods	\$ 16,601	\$ 33	\$ 1,216
Wholesale & Retail Trade	\$ 225	\$ 27	\$ 829
Transportation	\$ 8,400	\$ 29	\$ 1,727
Information Services	\$ -	\$ 1	\$ 73
Finance, Insurance, Real Estate & Leasing	\$ 3,324	\$ 16	\$ 863
Services & Government	\$ 19,921	\$ 502	\$ 16,520
Professional, Scientific & Technical Services	\$ 3,265	\$ 41	\$ 2,776
Administrative & Waste Management Services	\$ 15,971	\$ 365	\$ 10,930
Health, Education & Social Services	\$ -	\$ 38	\$ 1,350
Other Services & Government	\$ 686	\$ 58	\$ 1,464
Total	\$ 50,401	695	\$ 26,554

Source: Business Research and Economic Advisors

Table 47 – Total Economic Impacts – Missouri - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	32	\$ 2,522
Manufacturing	\$ 21,878	320	\$ 19,089
Nondurable Goods	\$ 13,663	157	\$ 10,611
Durable Goods	\$ 8,215	163	\$ 8,478
Wholesale & Retail Trade	\$ 684	225	\$ 8,647
Transportation	\$ 20,267	175	\$ 10,930
Information Services	\$ 10,858	44	\$ 3,405
Finance, Insurance, Real Estate & Leasing	\$ 13,380	295	\$ 18,545
Services & Government	\$ 104,495	2,660	\$ 134,273
Professional, Scientific & Technical Services	\$ 18,985	449	\$ 43,866
Administrative & Waste Management Services	\$ 32,204	724	\$ 27,382
Health, Education & Social Services	\$ 2,799	449	\$ 18,257
Other Services & Government	\$ 50,508	1,038	\$ 44,768
Total	\$ 171,564	3,752	\$ 197,411

Source: Business Research and Economic Advisors

Table 48 – Total Economic Impacts – Montana - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 7	3	\$ 248
Manufacturing	\$ 218	3	\$ 181
Nondurable Goods	\$ 206	1	\$ 72
Durable Goods	\$ 12	2	\$ 109
Wholesale & Retail Trade	\$ 7	6	\$ 221
Transportation	\$ 1,308	7	\$ 487
Information Services	\$ 95	1	\$ 41
Finance, Insurance, Real Estate & Leasing	\$ 1,261	7	\$ 435
Services & Government	\$ 5,126	103	\$ 4,333
Professional, Scientific & Technical Services	\$ 2,233	19	\$ 1,342
Administrative & Waste Management Services	\$ 2,887	59	\$ 2,183
Health, Education & Social Services	\$ 1	10	\$ 413
Other Services & Government	\$ 4	14	\$ 394
Total	\$ 8,023	130	\$ 5,945

Source: Business Research and Economic Advisors

Table 49 – Total Economic Impacts – Nebraska - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	6	\$ 403
Manufacturing	\$ 2,875	57	\$ 2,893
Nondurable Goods	\$ 2,672	15	\$ 948
Durable Goods	\$ 203	42	\$ 1,946
Wholesale & Retail Trade	\$ 39	35	\$ 1,256
Transportation	\$ 5,658	73	\$ 4,456
Information Services	\$ 388	6	\$ 567
Finance, Insurance, Real Estate & Leasing	\$ 10,442	41	\$ 2,732
Services & Government	\$ 10,903	333	\$ 14,682
Professional, Scientific & Technical Services	\$ 4,703	67	\$ 5,391
Administrative & Waste Management Services	\$ 6,090	140	\$ 5,349
Health, Education & Social Services	\$ 59	57	\$ 2,263
Other Services & Government	\$ 51	68	\$ 1,680
Total	\$ 30,304	552	\$ 26,989

Source: Business Research and Economic Advisors

Table 50 – Total Economic Impacts – Nevada - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	14	\$ 1,097
Manufacturing	\$ 25,778	183	\$ 13,674
Nondurable Goods	\$ 3,966	160	\$ 12,680
Durable Goods	\$ 21,812	24	\$ 994
Wholesale & Retail Trade	\$ 4,008	72	\$ 3,148
Transportation	\$ 12,628	81	\$ 4,632
Information Services	\$ 225	5	\$ 288
Finance, Insurance, Real Estate & Leasing	\$ 5,199	32	\$ 1,899
Services & Government	\$ 60,047	1,105	\$ 47,527
Professional, Scientific & Technical Services	\$ 20,031	147	\$ 13,661
Administrative & Waste Management Services	\$ 31,323	619	\$ 20,965
Health, Education & Social Services	\$ 41	64	\$ 2,742
Other Services & Government	\$ 8,654	275	\$ 10,159
Total	\$ 107,884	1,491	\$ 72,263

Source: Business Research and Economic Advisors

Table 51 – Total Economic Impacts – New Hampshire - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	3	\$ 271
Manufacturing	\$ 10,583	52	\$ 3,392
Nondurable Goods	\$ 10,551	18	\$ 1,608
Durable Goods	\$ 32	34	\$ 1,784
Wholesale & Retail Trade	\$ 1,495	30	\$ 1,559
Transportation	\$ 4,133	18	\$ 1,321
Information Services	\$ 36	2	\$ 151
Finance, Insurance, Real Estate & Leasing	\$ 4,600	17	\$ 1,502
Services & Government	\$ 15,637	264	\$ 14,445
Professional, Scientific & Technical Services	\$ 5,473	45	\$ 4,568
Administrative & Waste Management Services	\$ 8,224	122	\$ 5,920
Health, Education & Social Services	\$ 1,411	54	\$ 2,600
Other Services & Government	\$ 530	43	\$ 1,358
Total	\$ 36,486	387	\$ 22,643

Source: Business Research and Economic Advisors

Table 52 – Total Economic Impacts – New Jersey - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 138	134	\$ 12,743
Manufacturing	\$ 71,682	620	\$ 55,767
Nondurable Goods	\$ 50,678	301	\$ 26,522
Durable Goods	\$ 21,004	319	\$ 29,246
Wholesale & Retail Trade	\$ 18,410	637	\$ 48,905
Transportation	\$ 144,885	1,483	\$ 59,042
Information Services	\$ 12,747	136	\$ 15,295
Finance, Insurance, Real Estate & Leasing	\$ 30,656	549	\$ 50,354
Services & Government	\$ 251,127	6,091	\$ 341,521
Professional, Scientific & Technical Services	\$ 94,578	1,214	\$ 124,630
Administrative & Waste Management Services	\$ 111,825	3,590	\$ 164,876
Health, Education & Social Services	\$ 78	69	\$ 3,237
Other Services & Government	\$ 44,646	1,218	\$ 48,778
Total	\$ 529,647	9,649	\$ 583,627

Source: Business Research and Economic Advisors

Table 53 – Total Economic Impacts – New Mexico - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	9	\$ 790
Manufacturing	\$ 613	10	\$ 561
Nondurable Goods	\$ 535	5	\$ 363
Durable Goods	\$ 78	5	\$ 198
Wholesale & Retail Trade	\$ 10	14	\$ 445
Transportation	\$ 3,159	14	\$ 1,008
Information Services	\$ 2	1	\$ 76
Finance, Insurance, Real Estate & Leasing	\$ 2,032	11	\$ 592
Services & Government	\$ 15,201	242	\$ 11,727
Professional, Scientific & Technical Services	\$ 8,675	64	\$ 5,295
Administrative & Waste Management Services	\$ 6,026	121	\$ 4,750
Health, Education & Social Services	\$ -	24	\$ 830
Other Services & Government	\$ 500	33	\$ 852
Total	\$ 21,015	301	\$ 15,199

Source: Business Research and Economic Advisors

Table 54 – Total Economic Impacts – New York - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 1,271	310	\$ 32,359
Manufacturing	\$ 138,294	1,119	\$ 89,818
Nondurable Goods	\$ 89,341	638	\$ 55,111
Durable Goods	\$ 48,953	480	\$ 34,707
Wholesale & Retail Trade	\$ 35,290	845	\$ 61,214
Transportation	\$ 149,110	1,951	\$ 71,714
Information Services	\$ 3,836	239	\$ 26,541
Finance, Insurance, Real Estate & Leasing	\$ 276,306	1,454	\$ 190,607
Services & Government	\$ 690,504	11,324	\$ 650,858
Professional, Scientific & Technical Services	\$ 187,670	2,499	\$ 215,786
Administrative & Waste Management Services	\$ 183,565	3,822	\$ 196,506
Health, Education & Social Services	\$ 3,413	279	\$ 14,666
Other Services & Government	\$ 315,856	4,723	\$ 223,900
Total	\$ 1,294,611	17,240	\$ 1,123,111

Source: Business Research and Economic Advisors

Table 55 – Total Economic Impacts – North Carolina - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	44	\$ 2,811
Manufacturing	\$ 91,156	536	\$ 31,729
Nondurable Goods	\$ 79,173	234	\$ 15,840
Durable Goods	\$ 11,983	301	\$ 15,889
Wholesale & Retail Trade	\$ 8,017	245	\$ 10,576
Transportation	\$ 44,110	223	\$ 13,817
Information Services	\$ 2,302	22	\$ 2,110
Finance, Insurance, Real Estate & Leasing	\$ 20,323	131	\$ 10,202
Services & Government	\$ 141,069	3,186	\$ 141,449
Professional, Scientific & Technical Services	\$ 43,555	517	\$ 45,624
Administrative & Waste Management Services	\$ 84,119	1,806	\$ 65,870
Health, Education & Social Services	\$ 520	338	\$ 13,397
Other Services & Government	\$ 12,873	526	\$ 16,557
Total	\$ 306,978	4,387	\$ 212,694

Source: Business Research and Economic Advisors

Table 56 – Total Economic Impacts – North Dakota - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 36	3	\$ 273
Manufacturing	\$ 523	8	\$ 355
Nondurable Goods	\$ 495	3	\$ 154
Durable Goods	\$ 28	5	\$ 200
Wholesale & Retail Trade	\$ 6	9	\$ 296
Transportation	\$ 1,122	6	\$ 418
Information Services	\$ 273	2	\$ 85
Finance, Insurance, Real Estate & Leasing	\$ 1,503	8	\$ 412
Services & Government	\$ 6,403	160	\$ 5,259
Professional, Scientific & Technical Services	\$ 1,486	16	\$ 979
Administrative & Waste Management Services	\$ 4,894	114	\$ 3,392
Health, Education & Social Services	\$ -	15	\$ 523
Other Services & Government	\$ 24	15	\$ 365
Total	\$ 9,867	196	\$ 7,097

Source: Business Research and Economic Advisors

Table 57 – Total Economic Impacts – Ohio - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 1	41	\$ 3,504
Manufacturing	\$ 32,604	500	\$ 36,489
Nondurable Goods	\$ 11,746	330	\$ 26,334
Durable Goods	\$ 20,858	171	\$ 10,155
Wholesale & Retail Trade	\$ 1,762	269	\$ 10,848
Transportation	\$ 31,537	178	\$ 12,897
Information Services	\$ 83	18	\$ 1,451
Finance, Insurance, Real Estate & Leasing	\$ 36,000	178	\$ 11,979
Services & Government	\$ 141,842	3,384	\$ 154,286
Professional, Scientific & Technical Services	\$ 38,962	531	\$ 48,972
Administrative & Waste Management Services	\$ 61,012	1,374	\$ 49,617
Health, Education & Social Services	\$ 3,103	524	\$ 20,736
Other Services & Government	\$ 38,764	956	\$ 34,962
Total	\$ 243,828	4,569	\$ 231,454

Source: Business Research and Economic Advisors

Table 58 – Total Economic Impacts – Oklahoma - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 21	46	\$ 4,817
Manufacturing	\$ 5,586	57	\$ 3,089
Nondurable Goods	\$ 5,401	24	\$ 1,509
Durable Goods	\$ 185	33	\$ 1,579
Wholesale & Retail Trade	\$ 693	50	\$ 1,754
Transportation	\$ 11,157	59	\$ 5,228
Information Services	\$ 9	5	\$ 300
Finance, Insurance, Real Estate & Leasing	\$ 5,594	38	\$ 1,916
Services & Government	\$ 29,739	744	\$ 28,385
Professional, Scientific & Technical Services	\$ 8,188	97	\$ 6,716
Administrative & Waste Management Services	\$ 21,226	464	\$ 16,333
Health, Education & Social Services	\$ 279	85	\$ 2,959
Other Services & Government	\$ 46	96	\$ 2,377
Total	\$ 52,800	1,000	\$ 45,489

Source: Business Research and Economic Advisors

Table 59 – Total Economic Impacts – Oregon - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 342	282	\$ 14,395
Manufacturing	\$ 16,748	513	\$ 36,308
Nondurable Goods	\$ 7,341	335	\$ 27,322
Durable Goods	\$ 9,408	178	\$ 8,986
Wholesale & Retail Trade	\$ 1,316	316	\$ 20,941
Transportation	\$ 37,497	1,346	\$ 59,985
Information Services	\$ 510	67	\$ 5,588
Finance, Insurance, Real Estate & Leasing	\$ 6,915	222	\$ 12,600
Services & Government	\$ 132,546	2,404	\$ 102,495
Professional, Scientific & Technical Services	\$ 114,747	662	\$ 47,297
Administrative & Waste Management Services	\$ 14,383	770	\$ 24,588
Health, Education & Social Services	\$ 16	47	\$ 1,399
Other Services & Government	\$ 3,398	925	\$ 29,211
Total	\$ 195,874	5,151	\$ 252,313

Source: Business Research and Economic Advisors

Table 60 – Total Economic Impacts – Pennsylvania - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	188	\$ 16,012
Manufacturing	\$ 162,615	1,313	\$ 96,389
Nondurable Goods	\$ 43,196	977	\$ 73,730
Durable Goods	\$ 119,419	336	\$ 22,659
Wholesale & Retail Trade	\$ 19,936	346	\$ 23,588
Transportation	\$ 60,567	755	\$ 40,339
Information Services	\$ 2,349	97	\$ 7,875
Finance, Insurance, Real Estate & Leasing	\$ 34,176	769	\$ 54,818
Services & Government	\$ 170,286	3,617	\$ 181,008
Professional, Scientific & Technical Services	\$ 71,484	1,046	\$ 90,987
Administrative & Waste Management Services	\$ 89,005	1,647	\$ 60,664
Health, Education & Social Services	\$ 475	114	\$ 5,839
Other Services & Government	\$ 9,322	810	\$ 23,519
Total	\$ 449,928	7,086	\$ 420,029

Source: Business Research and Economic Advisors

Table 61 – Total Economic Impacts – Rhode Island - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	4	\$ 239
Manufacturing	\$ 703	24	\$ 1,431
Nondurable Goods	\$ 240	16	\$ 1,024
Durable Goods	\$ 463	8	\$ 408
Wholesale & Retail Trade	\$ 1,988	26	\$ 1,120
Transportation	\$ 7,865	44	\$ 1,949
Information Services	\$ -	2	\$ 204
Finance, Insurance, Real Estate & Leasing	\$ 4,699	15	\$ 1,089
Services & Government	\$ 14,396	311	\$ 12,682
Professional, Scientific & Technical Services	\$ 3,413	33	\$ 3,054
Administrative & Waste Management Services	\$ 7,480	149	\$ 5,534
Health, Education & Social Services	\$ 24	44	\$ 1,793
Other Services & Government	\$ 3,479	84	\$ 2,300
Total	\$ 29,651	426	\$ 18,714

Source: Business Research and Economic Advisors

Table 62 – Total Economic Impacts – South Carolina - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	45	\$ 3,113
Manufacturing	\$ 29,114	337	\$ 19,835
Nondurable Goods	\$ 14,923	164	\$ 10,623
Durable Goods	\$ 14,191	173	\$ 9,212
Wholesale & Retail Trade	\$ 6,216	221	\$ 7,815
Transportation	\$ 62,859	633	\$ 25,904
Information Services	\$ -	11	\$ 757
Finance, Insurance, Real Estate & Leasing	\$ 6,485	64	\$ 4,125
Services & Government	\$ 64,877	2,063	\$ 74,677
Professional, Scientific & Technical Services	\$ 9,738	197	\$ 15,408
Administrative & Waste Management Services	\$ 44,575	1,090	\$ 37,659
Health, Education & Social Services	\$ -	225	\$ 8,413
Other Services & Government	\$ 10,565	551	\$ 13,197
Total	\$ 169,551	3,375	\$ 136,226

Source: Business Research and Economic Advisors

Table 63 – Total Economic Impacts – South Dakota - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	1	\$ 74
Manufacturing	\$ 693	8	\$ 353
Nondurable Goods	\$ 543	3	\$ 161
Durable Goods	\$ 150	5	\$ 192
Wholesale & Retail Trade	\$ 44	6	\$ 186
Transportation	\$ 1,247	6	\$ 311
Information Services	\$ 2	-	\$ 17
Finance, Insurance, Real Estate & Leasing	\$ 2,276	7	\$ 376
Services & Government	\$ 3,669	84	\$ 2,955
Professional, Scientific & Technical Services	\$ 1,268	12	\$ 756
Administrative & Waste Management Services	\$ 2,355	47	\$ 1,575
Health, Education & Social Services	\$ -	11	\$ 377
Other Services & Government	\$ 45	14	\$ 247
Total	\$ 7,930	113	\$ 4,273

Source: Business Research and Economic Advisors

Table 64 – Total Economic Impacts – Tennessee - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 0	11	\$ 580
Manufacturing	\$ 8,311	166	\$ 9,823
Nondurable Goods	\$ 7,627	71	\$ 4,690
Durable Goods	\$ 684	94	\$ 5,133
Wholesale & Retail Trade	\$ 146	102	\$ 4,045
Transportation	\$ 24,240	132	\$ 9,274
Information Services	\$ 79	8	\$ 559
Finance, Insurance, Real Estate & Leasing	\$ 11,602	103	\$ 7,021
Services & Government	\$ 71,077	1,404	\$ 61,104
Professional, Scientific & Technical Services	\$ 21,277	205	\$ 16,191
Administrative & Waste Management Services	\$ 46,744	840	\$ 31,782
Health, Education & Social Services	\$ 770	165	\$ 7,339
Other Services & Government	\$ 2,286	194	\$ 5,792
Total	\$ 115,456	1,925	\$ 92,407

Source: Business Research and Economic Advisors

Table 65 – Total Economic Impacts – Texas – 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 19,926	3,062	\$ 450,087
Manufacturing	\$ 459,488	2,241	\$ 199,526
Nondurable Goods	\$ 334,417	1,550	\$ 137,328
Durable Goods	\$ 125,071	691	\$ 62,198
Wholesale & Retail Trade	\$ 82,227	1,668	\$ 112,788
Transportation	\$ 255,497	3,834	\$ 205,756
Information Services	\$ 12,125	377	\$ 35,301
Finance, Insurance, Real Estate & Leasing	\$ 47,612	2,530	\$ 184,906
Services & Government	\$ 633,769	12,530	\$ 560,663
Professional, Scientific & Technical Services	\$ 122,599	2,580	\$ 214,501
Administrative & Waste Management Services	\$ 409,551	5,257	\$ 210,085
Health, Education & Social Services	\$ 2,067	159	\$ 7,118
Other Services & Government	\$ 99,551	4,533	\$ 128,960
Total	\$ 1,510,645	26,241	\$ 1,749,028

Source: Business Research and Economic Advisors

Table 66 – Total Economic Impacts – Utah - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 0	14	\$ 1,118
Manufacturing	\$ 1,868	73	\$ 4,076
Nondurable Goods	\$ 1,286	39	\$ 2,579
Durable Goods	\$ 581	34	\$ 1,497
Wholesale & Retail Trade	\$ 161	66	\$ 2,371
Transportation	\$ 14,778	75	\$ 5,760
Information Services	\$ 1,157	12	\$ 724
Finance, Insurance, Real Estate & Leasing	\$ 5,557	71	\$ 4,253
Services & Government	\$ 35,836	978	\$ 37,628
Professional, Scientific & Technical Services	\$ 9,585	139	\$ 10,805
Administrative & Waste Management Services	\$ 24,247	567	\$ 18,539
Health, Education & Social Services	\$ 418	111	\$ 3,837
Other Services & Government	\$ 1,586	162	\$ 4,447
Total	\$ 59,356	1,290	\$ 55,930

Source: Business Research and Economic Advisors

Table 67 – Total Economic Impacts – Vermont – 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	1	\$ 86
Manufacturing	\$ 660	8	\$ 637
Nondurable Goods	\$ 525	4	\$ 418
Durable Goods	\$ 135	4	\$ 219
Wholesale & Retail Trade	\$ 18	4	\$ 193
Transportation	\$ 1,088	5	\$ 360
Information Services	\$ 123	1	\$ 53
Finance, Insurance, Real Estate & Leasing	\$ 1,580	5	\$ 426
Services & Government	\$ 11,588	75	\$ 4,238
Professional, Scientific & Technical Services	\$ 9,519	19	\$ 1,920
Administrative & Waste Management Services	\$ 2,064	34	\$ 1,506
Health, Education & Social Services	\$ -	12	\$ 484
Other Services & Government	\$ 5	10	\$ 329
Total	\$ 15,056	99	\$ 5,993

Source: Business Research and Economic Advisors

Table 68 – Total Economic Impacts – Virginia - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	28	\$ 2,121
Manufacturing	\$ 62,576	269	\$ 18,246
Nondurable Goods	\$ 15,559	171	\$ 13,206
Durable Goods	\$ 47,017	98	\$ 5,039
Wholesale & Retail Trade	\$ 2,177	170	\$ 6,849
Transportation	\$ 34,874	209	\$ 12,707
Information Services	\$ 916	25	\$ 3,240
Finance, Insurance, Real Estate & Leasing	\$ 11,864	431	\$ 34,957
Services & Government	\$ 125,160	2,430	\$ 138,918
Professional, Scientific & Technical Services	\$ 51,471	581	\$ 65,588
Administrative & Waste Management Services	\$ 68,076	1,214	\$ 50,371
Health, Education & Social Services	\$ 751	257	\$ 10,800
Other Services & Government	\$ 4,863	378	\$ 12,159
Total	\$ 237,568	3,563	\$ 217,038

Source: Business Research and Economic Advisors

Table 69 – Total Economic Impacts – Washington – 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ 2,003	819	\$ 45,882
Manufacturing	\$ 173,077	1,738	\$ 145,424
Nondurable Goods	\$ 59,950	1,082	\$ 96,351
Durable Goods	\$ 113,127	656	\$ 49,073
Wholesale & Retail Trade	\$ 25,825	1,065	\$ 70,009
Transportation	\$ 300,090	4,146	\$ 238,284
Information Services	\$ 6,676	314	\$ 45,672
Finance, Insurance, Real Estate & Leasing	\$ 18,696	654	\$ 46,108
Services & Government	\$ 310,153	10,452	\$ 490,661
Professional, Scientific & Technical Services	\$ 118,777	2,389	\$ 172,677
Administrative & Waste Management Services	\$ 77,117	4,359	\$ 198,099
Health, Education & Social Services	\$ 12,245	326	\$ 12,543
Other Services & Government	\$ 102,015	3,378	\$ 107,342
Total	\$ 836,520	19,189	\$ 1,082,040

Source: Business Research and Economic Advisors

Table 70 – Total Economic Impacts – West Virginia – 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	7	\$ 570
Manufacturing	\$ 258	11	\$ 787
Nondurable Goods	\$ 258	6	\$ 430
Durable Goods	\$ -	5	\$ 357
Wholesale & Retail Trade	\$ -	11	\$ 372
Transportation	\$ 3,517	22	\$ 1,400
Information Services	\$ -	1	\$ 48
Finance, Insurance, Real Estate & Leasing	\$ 1,943	9	\$ 540
Services & Government	\$ 9,489	231	\$ 8,584
Professional, Scientific & Technical Services	\$ 2,858	28	\$ 1,806
Administrative & Waste Management Services	\$ 6,563	155	\$ 5,228
Health, Education & Social Services	\$ 68	24	\$ 902
Other Services & Government	\$ 1	24	\$ 648
Total	\$ 15,206	292	\$ 12,302

Source: Business Research and Economic Advisors

Table 71 – Total Economic Impacts – Wisconsin - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	10	\$ 748
Manufacturing	\$ 8,562	148	\$ 9,622
Nondurable Goods	\$ 5,973	76	\$ 5,794
Durable Goods	\$ 2,589	71	\$ 3,829
Wholesale & Retail Trade	\$ 501	62	\$ 2,275
Transportation	\$ 9,912	59	\$ 3,690
Information Services	\$ 32	5	\$ 373
Finance, Insurance, Real Estate & Leasing	\$ 19,830	82	\$ 5,488
Services & Government	\$ 34,855	808	\$ 32,845
Professional, Scientific & Technical Services	\$ 14,071	135	\$ 11,171
Administrative & Waste Management Services	\$ 19,420	441	\$ 14,138
Health, Education & Social Services	\$ 466	117	\$ 4,754
Other Services & Government	\$ 897	116	\$ 2,782
Total	\$ 73,691	1,175	\$ 55,041

Source: Business Research and Economic Advisors

Table 72 – Total Economic Impacts – Wyoming - 2018

Sector	Direct Purchases (\$1,000)	Total Employment	Total Wages (\$1,000)
Agriculture, Mining, Utilities & Construction	\$ -	4	\$ 409
Manufacturing	\$ 122	1	\$ 67
Nondurable Goods	\$ 122	-	\$ 18
Durable Goods	\$ -	1	\$ 49
Wholesale & Retail Trade	\$ 0	2	\$ 74
Transportation	\$ 818	6	\$ 422
Information Services	\$ -	-	\$ 9
Finance, Insurance, Real Estate & Leasing	\$ 552	3	\$ 166
Services & Government	\$ 2,797	42	\$ 1,970
Professional, Scientific & Technical Services	\$ 1,329	9	\$ 642
Administrative & Waste Management Services	\$ 1,468	27	\$ 1,060
Health, Education & Social Services	\$ -	3	\$ 99
Other Services & Government	\$ (0)	3	\$ 170
Total	\$ 4,287	58	\$ 3,117

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.

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