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CRUISE LINES INTERNATIONAL ASSOCIATION

Economic Contribution of Cruise Tourism to the United States 2024

REPORT PRODUCED FOR CLIA BY TOURISM ECONOMICS

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CONTENTS

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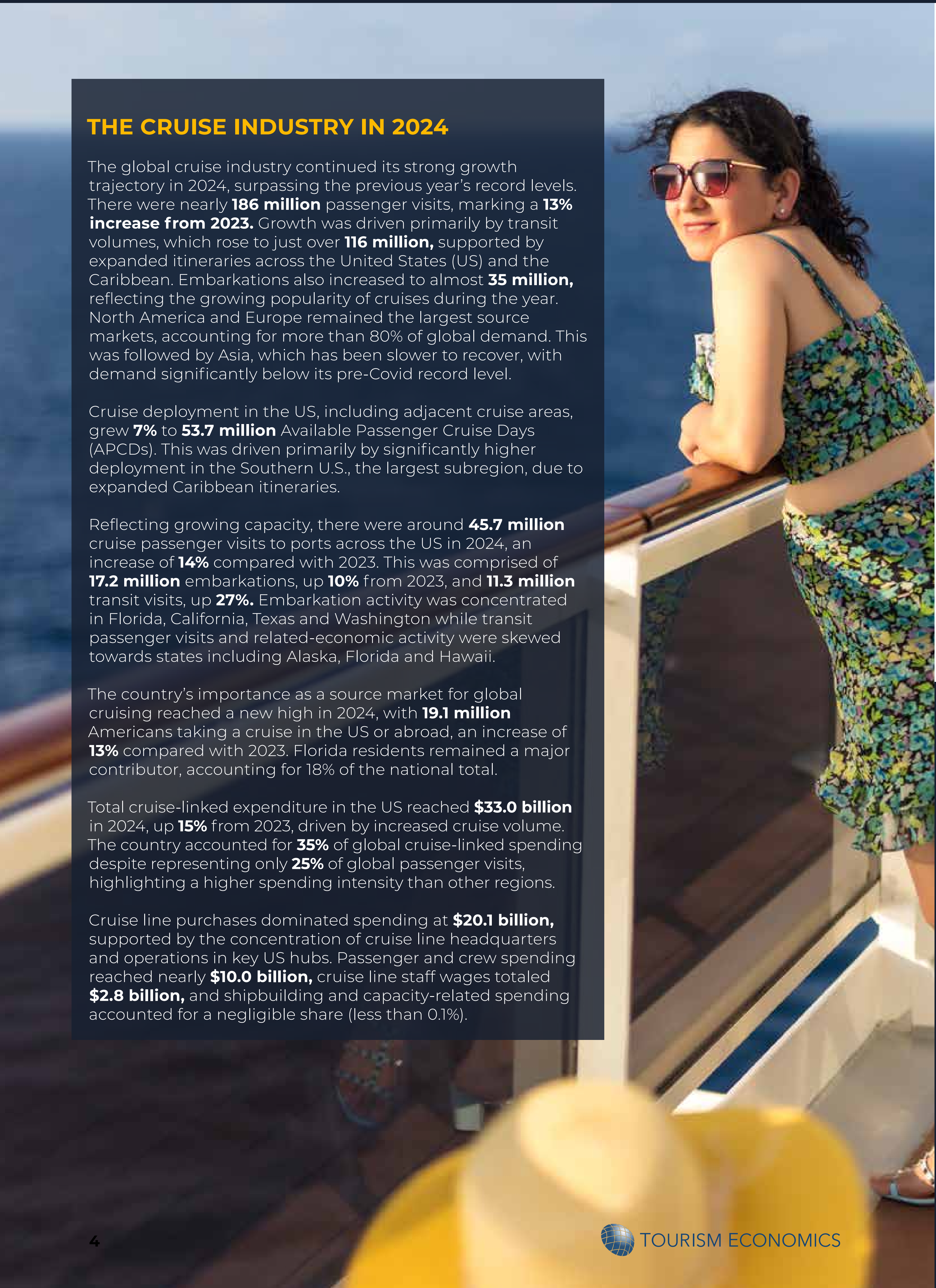
EXECUTIVE SUMMARY



THE CRUISE INDUSTRY IN 2024

The global cruise industry continued its strong growth trajectory in 2024, surpassing the previous year's record levels. There were nearly **186 million** passenger visits, marking a **13% increase from 2023.** Growth was driven primarily by transit volumes, which rose to just over **116 million,** supported by expanded itineraries across the United States (US) and the Caribbean. Embarkations also increased to almost **35 million,** reflecting the growing popularity of cruises during the year. North America and Europe remained the largest source markets, accounting for more than 80% of global demand. This was followed by Asia, which has been slower to recover, with demand significantly below its pre-Covid record level.

Cruise deployment in the US, including adjacent cruise areas, grew **7%** to **53.7 million** Available Passenger Cruise Days (APCDs). This was driven primarily by significantly higher deployment in the Southern U.S., the largest subregion, due to expanded Caribbean itineraries.

Reflecting growing capacity, there were around **45.7 million** cruise passenger visits to ports across the US in 2024, an increase of **14%** compared with 2023. This was comprised of **17.2 million** embarkations, up **10%** from 2023, and **11.3 million** transit visits, up **27%.** Embarkation activity was concentrated in Florida, California, Texas and Washington while transit passenger visits and related-economic activity were skewed towards states including Alaska, Florida and Hawaii.

The country's importance as a source market for global cruising reached a new high in 2024, with **19.1 million** Americans taking a cruise in the US or abroad, an increase of **13%** compared with 2023. Florida residents remained a major contributor, accounting for 18% of the national total.

Total cruise-linked expenditure in the US reached **$33.0 billion** in 2024, up **15%** from 2023, driven by increased cruise volume. The country accounted for **35%** of global cruise-linked spending despite representing only **25%** of global passenger visits, highlighting a higher spending intensity than other regions.

Cruise line purchases dominated spending at **$20.1 billion,** supported by the concentration of cruise line headquarters and operations in key US hubs. Passenger and crew spending reached nearly **$10.0 billion,** cruise line staff wages totaled **$2.8 billion,** and shipbuilding and capacity-related spending accounted for a negligible share (less than 0.1%).

How does the Cruise Industry Generate Economic Impact?

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

DIRECT IMPACT > **INDIRECT IMPACT** > **INDUCED IMPACT**

DIRECT IMPACT

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

INDIRECT IMPACT

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

INDUCED IMPACT

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

KEY FINDINGS FOR THE UNITED STATES

Cruising in the United States reached record levels in 2024, supported by increased deployment and rising demand among US residents. Cruise-linked spending totaled $33.0 billion, 15% above the 2023 record, generating substantial economic impacts, including:

$75.5 bn in total economic output

$41.4 bn to gross domestic product (GDP)

333,000 jobs

$25.8 bn in wages

Fig. 1. Summary of cruise industry activity in the United States, 2024

	Direct Cruise Line Employment	Direct Expenditure Linked	Indirect	Induced	Total
Output ($ bn)	-	31.8	21.8	21.8	75.5
GDP ($ bn)	-	16.6	12.3	12.5	41.4
Employment (Jobs, 000s)	23	151	71	87	333
Wages ($ bn)	2.8	10.0	6.3	6.7	25.8

Note: Values may not sum due to rounding
Source: Oxford Economics

State Results

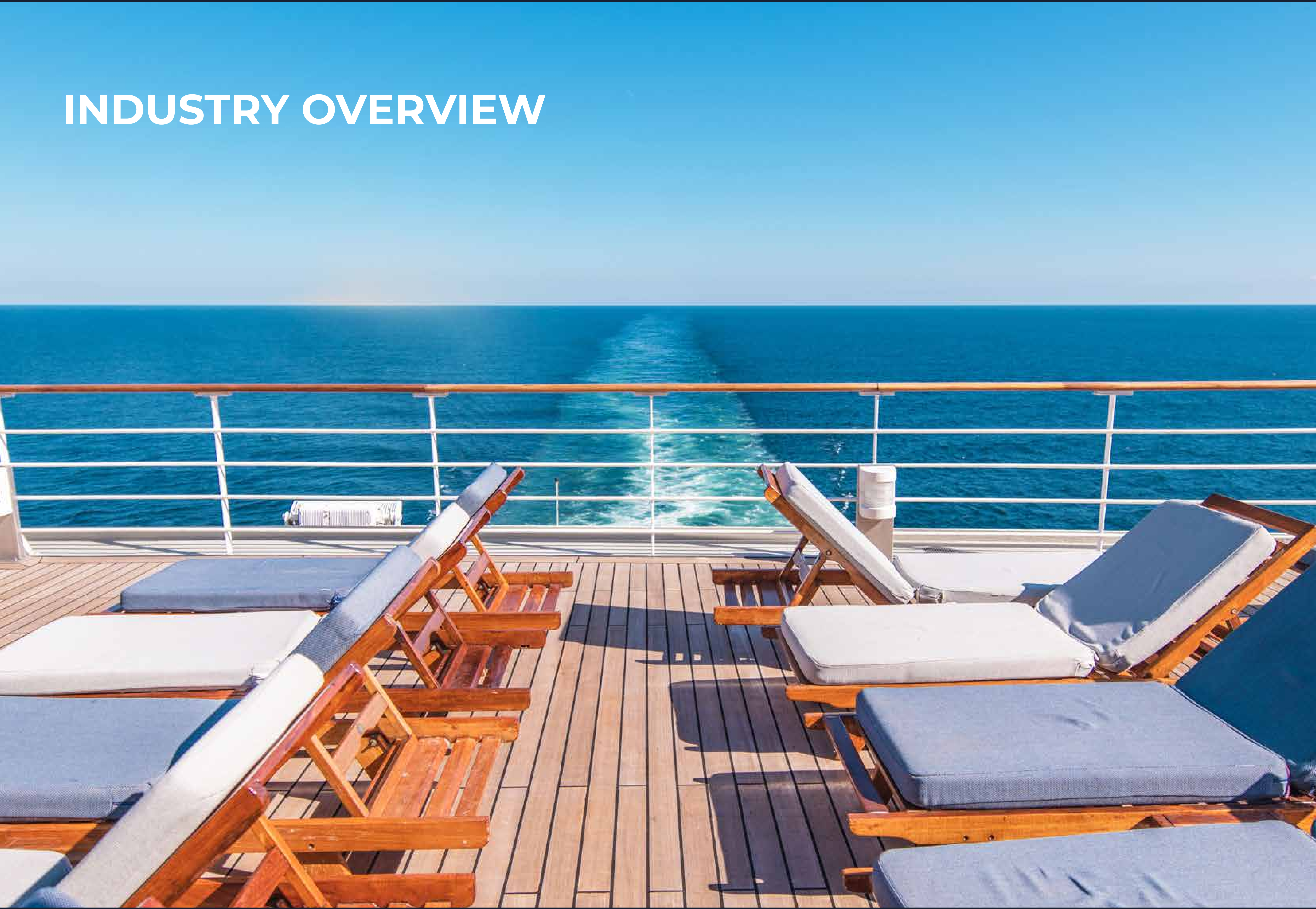
The cruise industry's total impacts across 11 strategically important states and the country as a whole are shown below for economic output, contribution to GDP, and employment.

Fig. 2. Summary of cruise industry activity in the United States by state, 2024

	Total Output ($ bn)	Total GDP ($ bn)	Total Employment (Jobs, 000s)
Florida	30.2	16.7	172
California	7.5	4.4	25
Texas	6.6	3.4	24
New York	3.3	2.0	11
Washington	2.9	1.7	12
Alaska	2.1	1.2	11
New Jersey	1.7	1.0	6
Louisiana	1.5	0.8	8
Georgia	1.4	0.7	4
South Carolina	1.1	0.5	5
Hawaii	0.6	0.3	3
Rest of United States	16.7	8.6	52
United States	**75.5**	**41.4**	**333**

Note: Values may not sum due to rounding
Source: Oxford Economics

INDUSTRY OVERVIEW

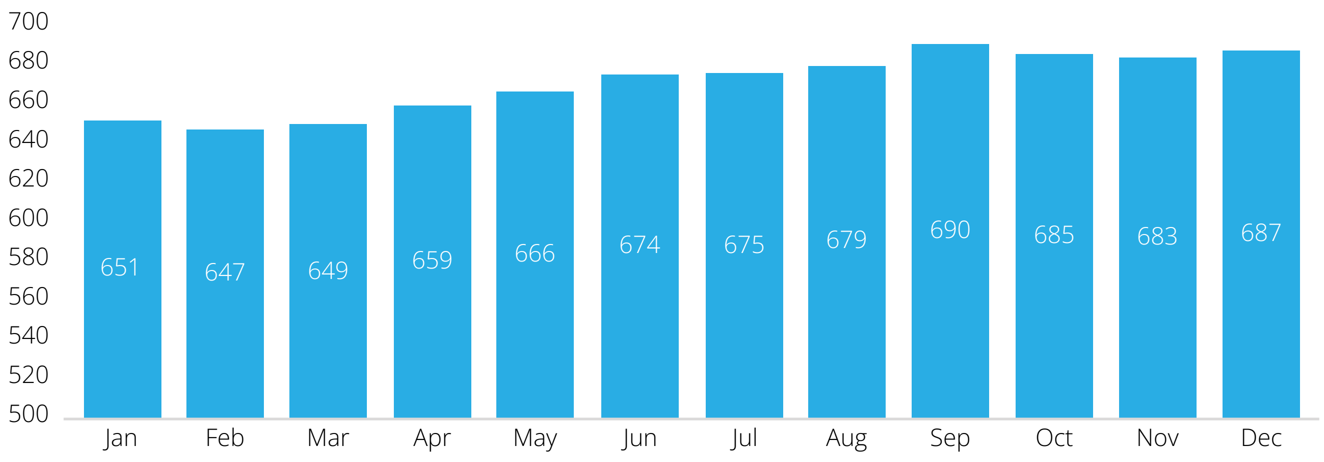


INDUSTRY OVERVIEW

In 2024, the global cruise industry continued its post-Covid rebound, reaching a new record level of passenger activity. Total passenger visits rose to nearly 186 million, a 13% increase from 2023, as the sector continued to expand its global footprint. Growth was primarily driven by transit volumes, which increased to just over 116 million, largely due to expanded itineraries across the United States and the Caribbean. Embarkations also increased to just under 35 million, reflecting increased global deployment and strong underlying demand for cruising. This volume represented 2.4% of the nearly 1.5 billion international tourist arrivals in 2024 reported by UNWTO, up from 2.0% in 2019.

Global cruise capacity grew in parallel with demand, reaching nearly 690,000 lower berths by year-end, up from 649,000 at the end of 2023. This expansion was fueled by the introduction of new vessels, including next-generation ships featuring enhanced efficiency and amenities.

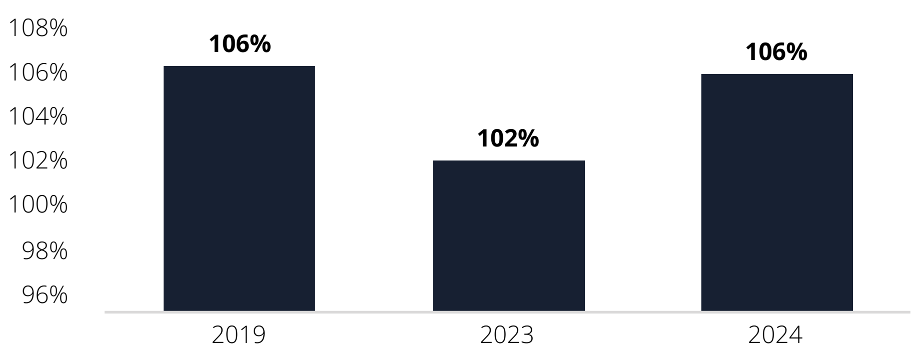
Fig. 3. Global cruise capacity, 2024 (000s of lower berths)



Source: Oxford Economics/Tourism Economics, Cruise-IP

Supported by steady demand across both established and emerging markets, occupancy levels also continued to rise. As a result, major cruise lines' occupancy in 2024 reached 106%, which was above 2023 (102%) and on par with 2019.

Fig. 4. Occupancies for major cruise lines

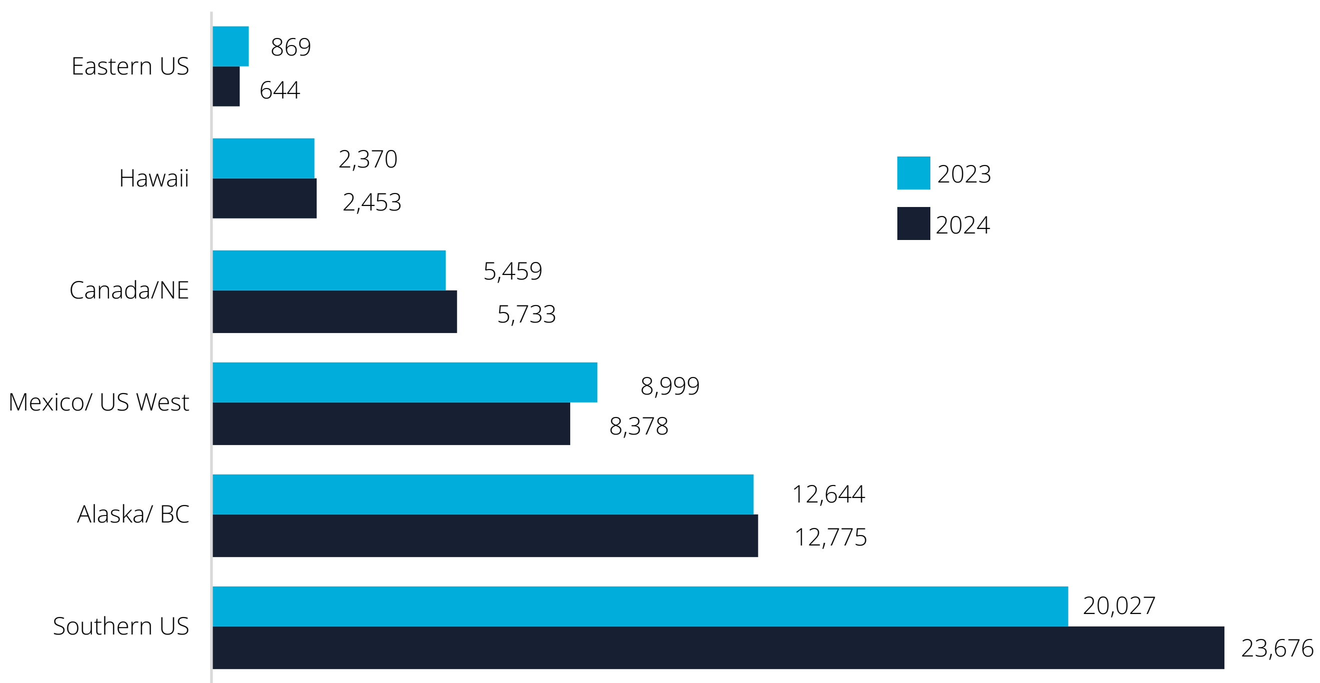


Source: Major cruise lines financial reports

Cruise deployment in the United States, including adjacent cruise areas, totaled 53.7 million Available Passenger Cruise Days (APCDs) in 2024, up 7% from 2023. This growth was overwhelmingly driven by the Southern US, the largest subregion, accounting for around 45% of US deployment, which grew 18% due to an expansion of Caribbean itineraries. The next-largest contribution to growth came from Canada/NE, which grew 5%.

Deployment in the Eastern US contracted by 26%, the greatest decline of any subregion in percentage terms. However, the small size of this cruise area mitigated the overall impact of this drop. A 7% fall in deployment in Mexico/US West had a heavier impact in absolute terms, but this was not enough to offset the healthy growth in overall deployment.

Fig. 5. Available passenger cruise days by subregion 2024 (000s)



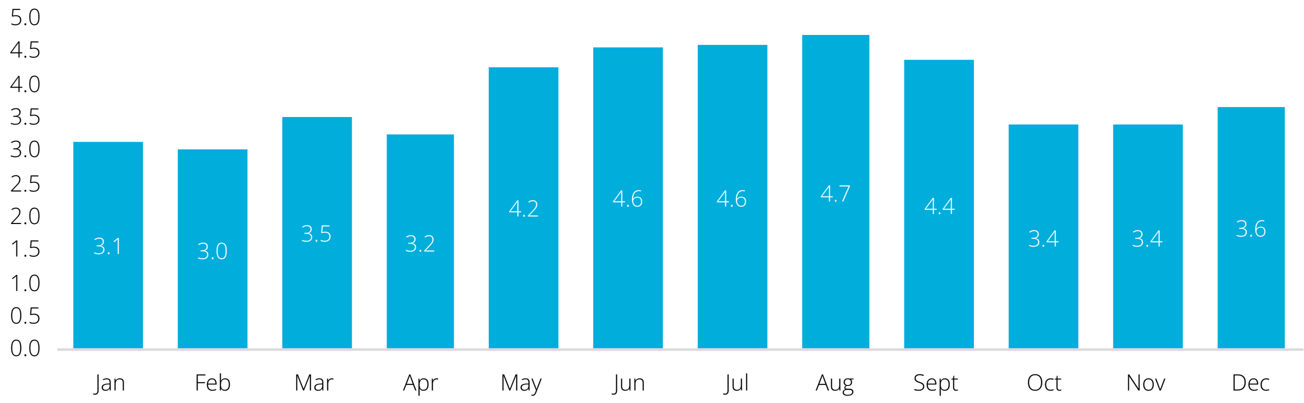
Source: Oxford Economics/Tourism Economics, Cruise-IP

In total, there were 45.7 million visits to ports and destinations in the United States in 2024, based on data provided by ports and our modeled estimates. This represents an increase of 14% from 40.2 million passenger visits in 2023.

Using supply-based data from Tourism Economics' Cruise-IP, the most comprehensive cruise industry database available based on planned itineraries, enables estimates of the monthly distribution of passenger visits in 2024.

The highest estimated monthly visitation was in August with 4.7 million passenger visits. The summer period, including the shoulder months of May and September, recorded higher passenger visitation in ports and destinations across the United States compared to other months of the year, coinciding with better weather. However, there is less seasonal variation in passenger visitation in the United States compared with Europe. This reflects significant winter cruise activity in southern subregions of the United States, which results in more consistent activity during the year.

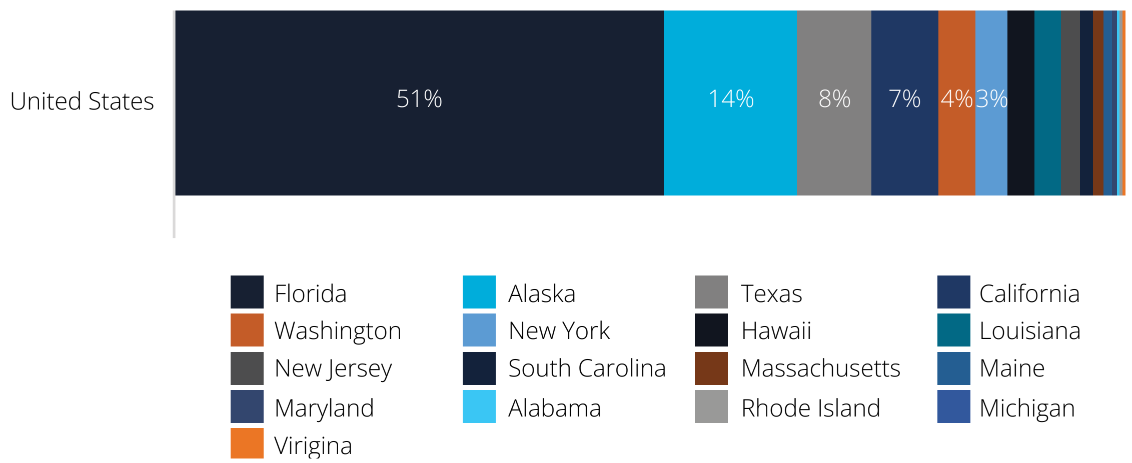
Fig. 6. Estimated US total passenger visits by month, 2024 (millions)



Source: Oxford Economics/Tourism Economics, Cruise-IP

According to our estimates, Florida accounted for around half of all passenger visits nationwide during the year, driven by major cruise hubs in the state. Alaska constituted the next-largest share at 14%, followed by Texas 8% and California 7%. Collectively, these four states represented an estimated 80% of all passenger visits to ports and destinations across the country in 2024.

Fig. 7. Total passenger visits by US state, 2024 (% of visits)



Note: Values may not sum due to rounding
Source: Oxford Economics

CRUISE INDUSTRY'S ECONOMIC IMPACT IN THE UNITED STATES

CRUISE INDUSTRY'S ECONOMIC IMPACT IN THE UNITED STATES

Overview of Economic Impact Analysis

In this report, we examine how the cruise industry in 2024 supported economic impacts across the United States. This includes discussion of the cruise industry's impact on eleven states with ocean-going cruise itineraries, namely, Florida, California, Texas, Washington, Alaska, New York, Louisiana, New Jersey, South Carolina, Georgia and Hawaii.[1]

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

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

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

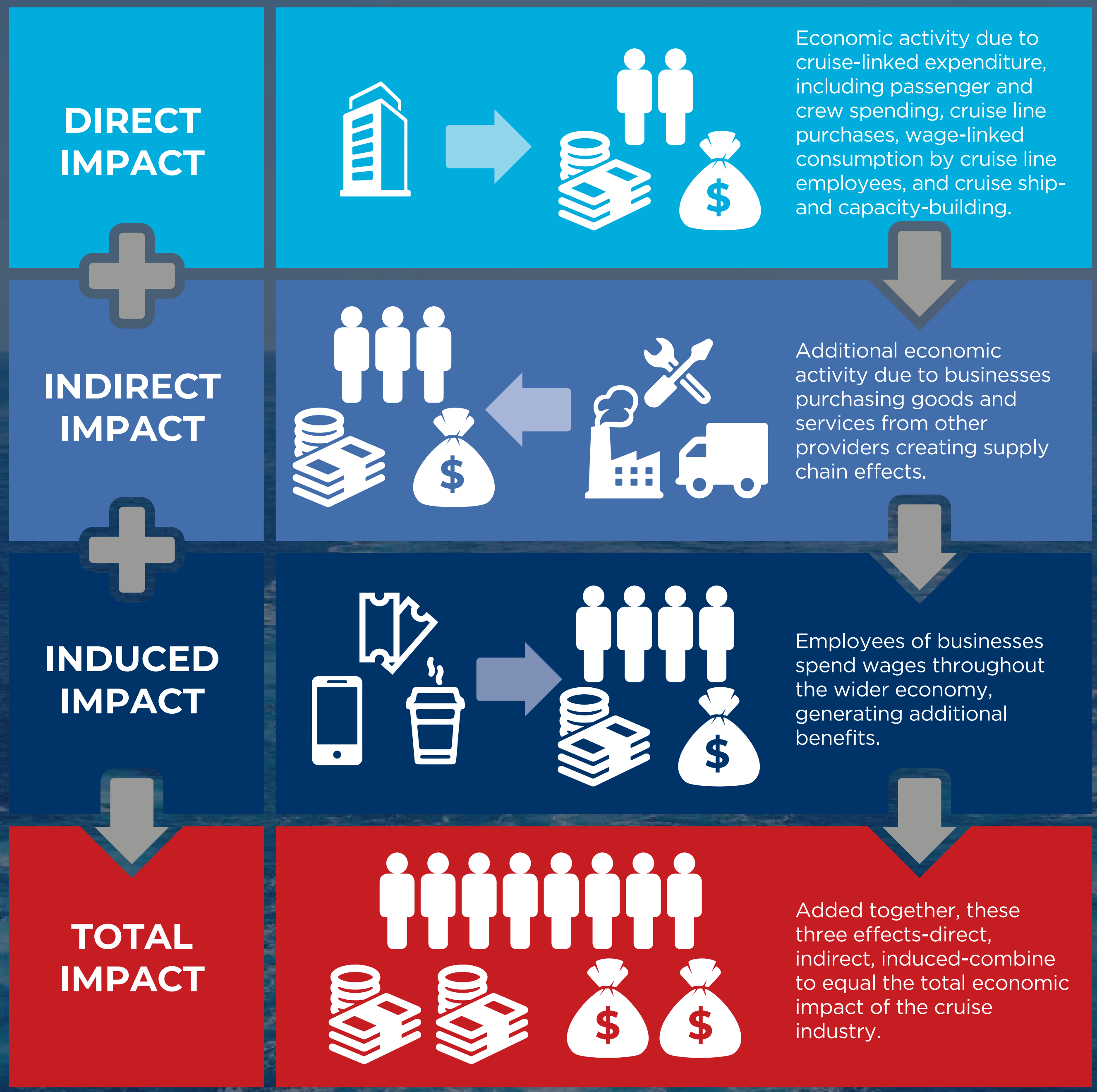
- **Output**—this consists of those goods or services that are produced by a company or industry. To calculate output, we add together the value of the inputs used in the production process including labor, capital, and intermediate goods and services. Output is closely linked to turnover.[2]
- **GDP**—the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

[1] Note: Analysis of the economic contribution of cruise tourism in all 51 states has been undertaken.. However, the state level profile section of the report includes analysis relating to 11 selected states.

[2] Lequiller,F. and D. Blades (2014), Understanding National Accounts: Second Edition, OECD Publishing.

[3] Ibid.

Channels of economic impact



Source: Oxford Economics

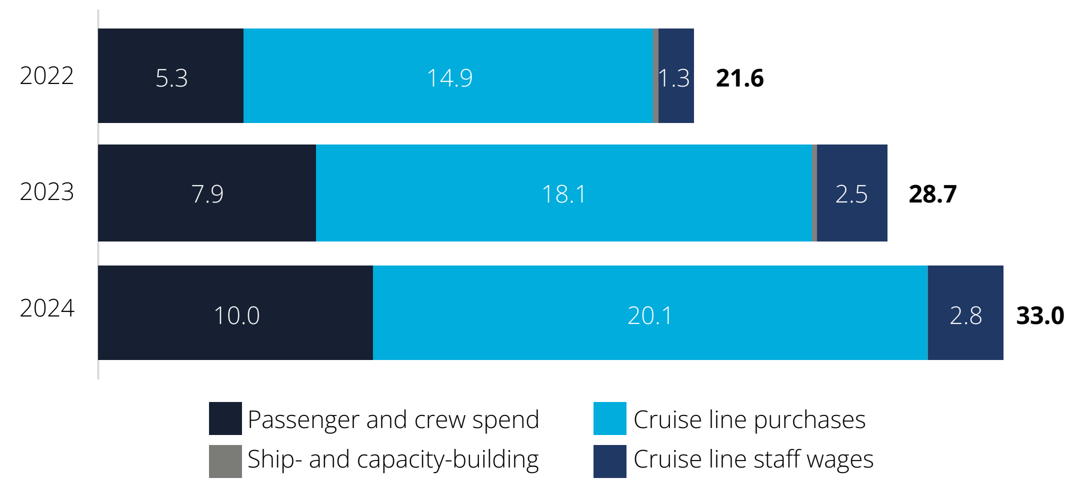
Direct Cruise-Linked Spending

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

1. Passenger and crew spending at ports in the United States
2. Cruise line purchases at ports in the United States
3. Ship- and capacity-building expenditure at shipyards in the United States
4. Cruise line staff wages (measured as spending of crew wages in country of residence)

Expenditure through each of these channels supports economic activity and employment throughout the United States with varied impacts on individual states. The direct cruise-related spending associated with these four channels in 2024 compared to 2023 and 2022 is shown below.

Fig. 8. Direct cruise-linked spending in United States ($ billions)



Note: Values may not sum due to rounding
Source: Oxford Economics

In 2024, total direct spending linked to the cruise industry was $33.0 billion, up 15% from 2023. Cruise line purchases accounted for most of this spending (61%), followed by passenger and crew spending (30%) and cruise line staff wages (9%). Ship- and capacity-building contributed less than 0.1% of total direct spending.

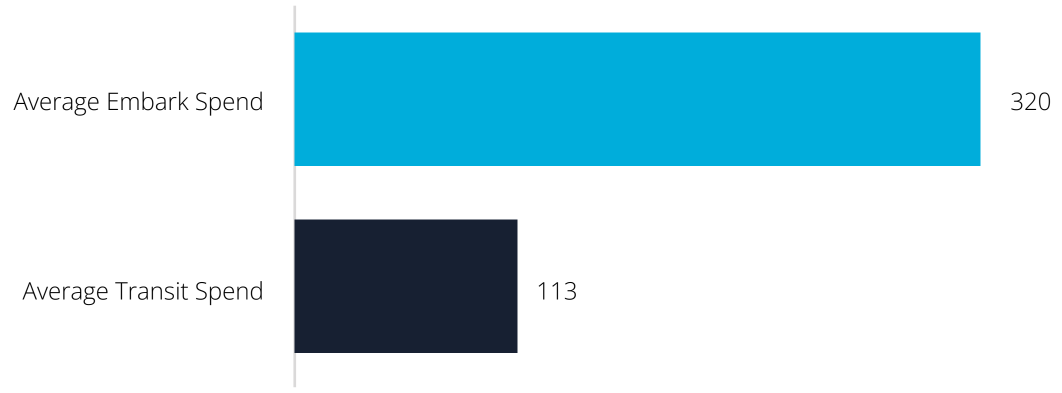
The United States represented around a quarter of global passenger visits in 2024. However, its share of global direct cruise-linked spending was significantly higher, at 35%, reflecting higher overall spending on cruise-related activities compared with other parts of the world.

By a significant margin, cruise line purchases were the largest contributor to direct cruise-linked spending in 2024, accounting for $20.1 billion. This figure represents an 11% increase from 2023 and 44% of the global total. The large share of spending reflects the extensive operational procurement, supply-chain contracting and corporate spending undertaken within the country's port and headquarters network. Several of the world's largest cruise operators maintain headquarters in Florida, Washington State, and California, further supporting domestic economic activity.

Passenger and crew spending ashore generated $10.0 billion in direct cruise-linked spending in 2024, driven by significant expenditure at major United States ports and surrounding visitor economies. Reflecting both strong growth in passenger visits and higher average spending, this category rose 27% compared with 2023, making it the fastest-growing channel and accounting for 37% of the global total.

In 2024, the average spend of transit passengers visiting United States ports was $113 while spending by embarking passengers was significantly higher at $320. This reflects their typically higher dwell time in ports, as well as additional costs such as accommodation.

Fig. 9. United States transit and embark spend per passenger, 2024 ($)

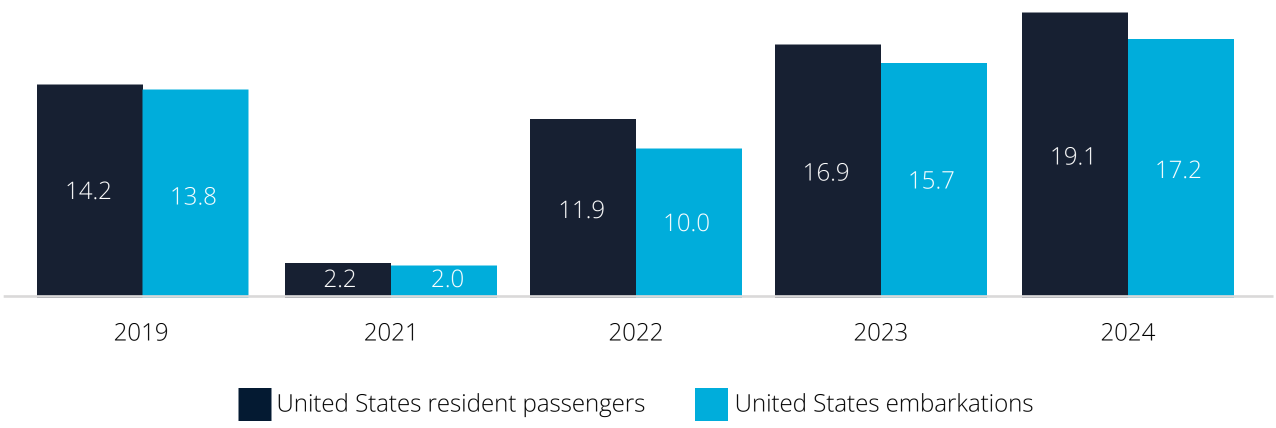


Source: Oxford Economics

Direct expenditure associated with cruise industry activity in the United States in 2024 amounted to **$33.0 billion.**

The United States is the world's most important source market for cruising, accounting for over half of global cruise embarkations in 2024. Driven by major cruise hubs, including the world's four largest homeports serving as key gateways to Caribbean itineraries, and strong domestic connectivity, a significant share of this demand benefits ports in the United States. Overall, including both domestic and international passengers, United States embarkations reached a record 17.2 million in 2024, up from 15.7 million in 2023 and well above the pre-pandemic levels in 2019.

Fig. 10. United States cruise passengers (millions)



Source: Oxford Economics/ CLIA One reSource passenger data

Cruise line staff wages generated $2.8 billion in direct cruise-linked spending in 2024. This includes wage-related spending in employees' places of residence, both for those working on cruise ships and those employed shoreside. Spending in this channel in the United States grew 11% compared to 2023 and comprises 32% of the worldwide total. This spending is sustained by the presence of a sizable shoreside workforce in the United States and relatively higher wage structures compared with many international cruise labor markets.

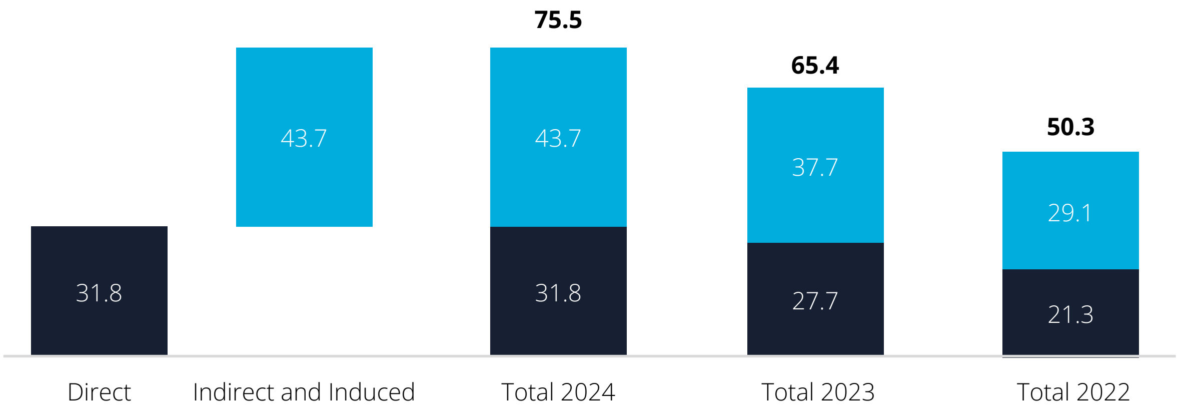
Employment associated with these shoreside and management functions typically differs in scale, skill profile, and remuneration from onboard crew roles, and therefore represents a distinct and important channel through which the cruise industry contributes to the United States economy.

Economic Impact

Output

Expenditure linked to cruise industry activity supports the production and sale of goods and services (output) through direct, indirect, and induced channels. **Output generated by the industry directly combined with additional impacts linked to indirect and induced effects amounted to an estimated €75.5 billion in 2024.** This included $31.8 billion in direct impacts, and $43.7 billion in indirect and induced impacts.[4]

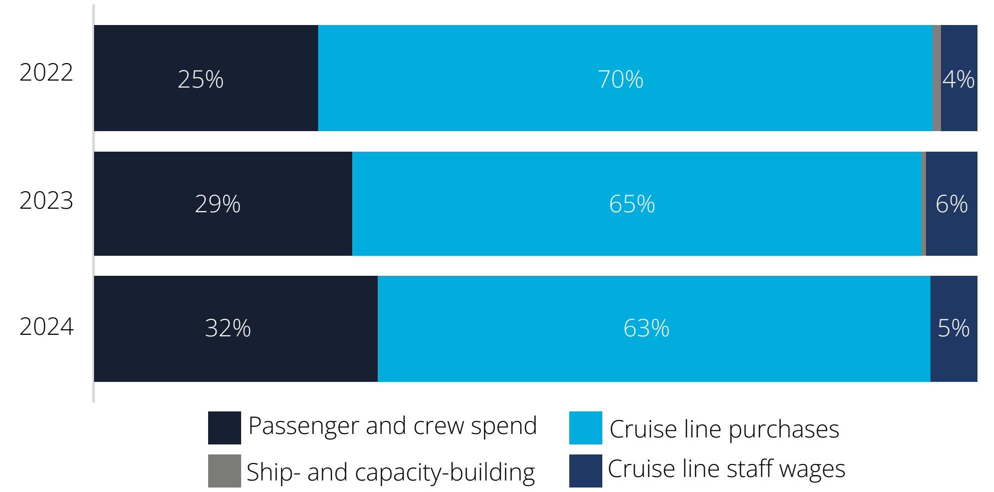
Fig. 11. Cruise industry output in the United States ($ billions)



Note: Values may not sum due to rounding
Source: Oxford Economics

The largest source of output linked to cruise industry activity in 2024 was cruise line purchases, making up 63% of total output in the United States. This marked a decrease from 65% in 2023 and 70% in 2022, as growth in output across other spending channels outpaced cruise line purchases. The next largest source of output was passenger and crew spend which increased to 32% of total output. In line with last year, cruise line staff wages accounted for most of the remaining output, representing 5% of the total in 2024.

Fig. 12. Share of cruise industry's output impacts by channel in the United States (% of total)



Note: Values may not sum due to rounding
Source: Oxford Economics

[4] Input-output analysis produces three types of impacts – direct, indirect, and induced – as well as a total impact figure, which is the sum of these three components.

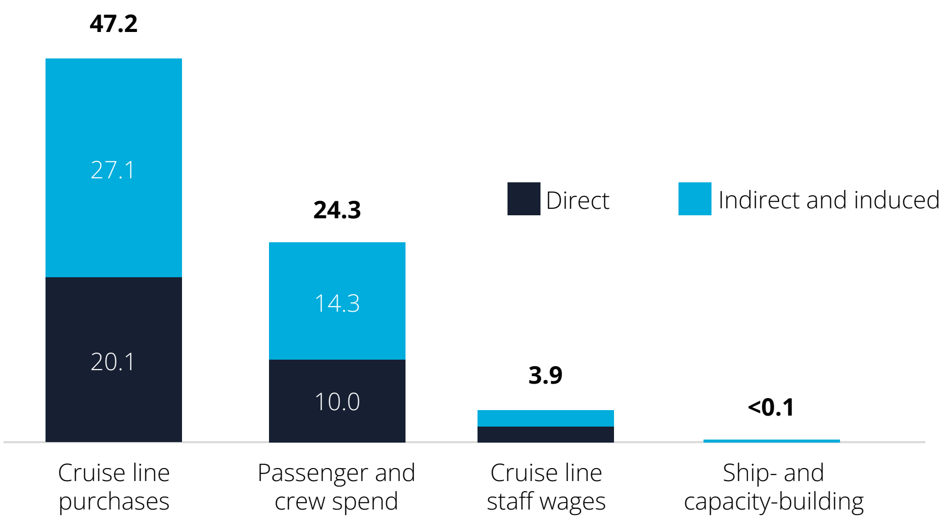
In 2024, most of the industry's overall output in the United States was linked to cruise line purchases, equivalent to $47.2 billion, with $20.1 billion generated through direct impacts. As the world's largest source market for cruising, the United States, particularly Florida and Texas as major Caribbean embarkation hubs, derives a greater share of cruise-related economic impact from cruise line purchases than from passenger and crew spending, as cruise lines concentrate provisioning and operational activities near key homeports.

The next largest channel was passenger and crew spending in ports and destinations, generating total output of $24.3 billion in 2024. This comprised $10.0 billion in direct spending at destinations and ports across the country and a further $14.3 billion generated through indirect and induced impacts.

Cruise line staff wages expenditure generated a further $3.9 billion in total output, while ship- and capacity-building activity contributed $3 million, representing under 0.1% of the industry's total output impact in the United States in 2024.

Across all spending channels, direct impacts accounted for a large share of output, underscoring the strong benefits from cruise activity accruing to tourism-facing and port-adjacent businesses. The most substantial direct contribution came from cruise line purchases ($20.1 billion), followed by direct passenger and crew spending ($10.0 billion), highlighting the importance of both cruise-related operational procurement and visitor expenditure to the United States economy.

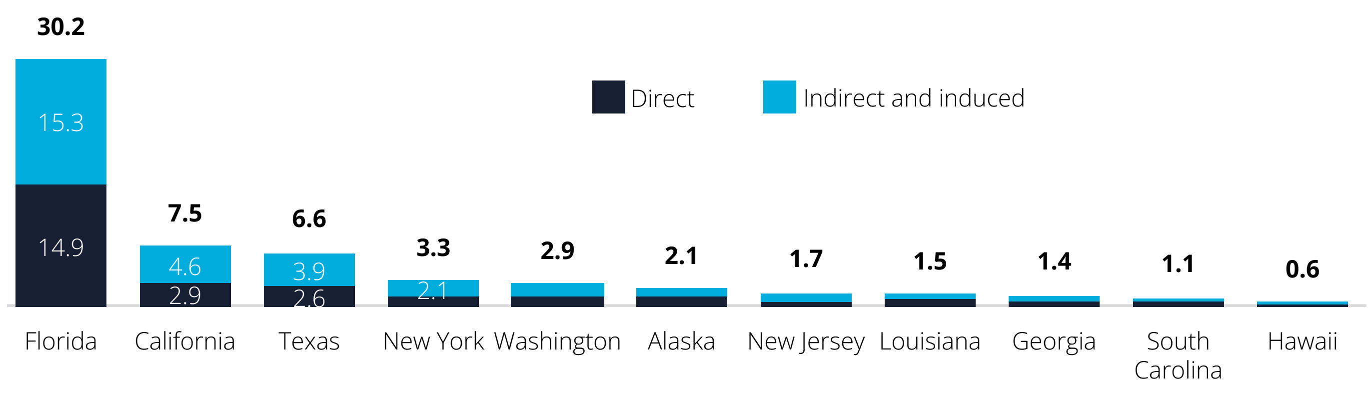
Fig. 13. Cruise industry's output impact in the United States by channel, 2024 ($ billions)



Note: Values may not sum due to rounding
Source: Oxford Economics

Consistent with previous years, Florida recorded by far the largest contribution from the cruise industry, with total output from cruise-related activities reaching $30.2 billion in 2024. California and Texas were the next largest beneficiaries, generating total cruise-linked output of $7.5 billion and $6.6 billion, respectively.

Fig. 14. Cruise industry's output impacts in the United States by state, 2024 ($ billions)



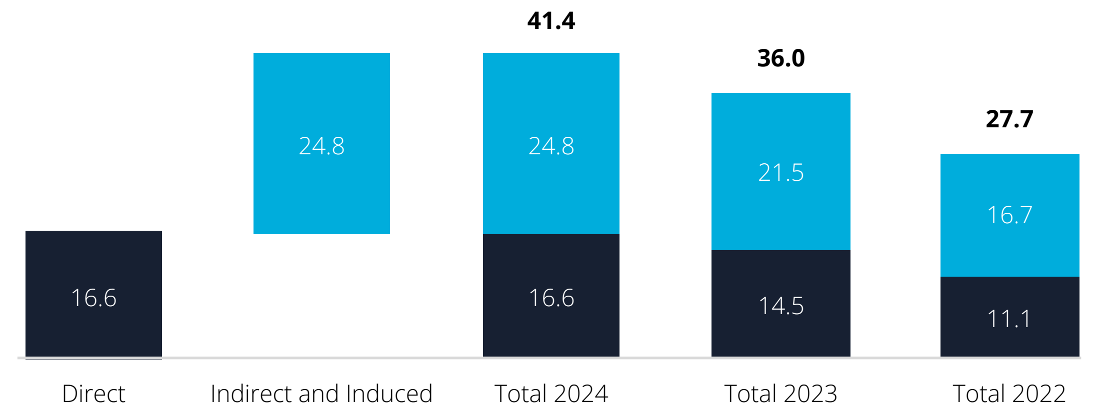
Note: Values may not sum due to rounding
Source: Oxford Economics

Cruise industry activities generated total output of **$75.5 billion** in the United States in 2024, with Florida recording the largest contribution of **$30.2 billion.**

GDP

An estimated $41.4 billion in gross domestic product (GDP) was supported by the cruise industry in the United States in 2024, up 15% from 2023. GDP supported directly by the cruise industry summed to $16.6 billion. Indirect supply chain and induced wage-spending effects contributed a further $24.8 billion to GDP. These results imply that every $1 in GDP generated directly by cruise industry activity supports an additional $1.49 due to multiplier effects.

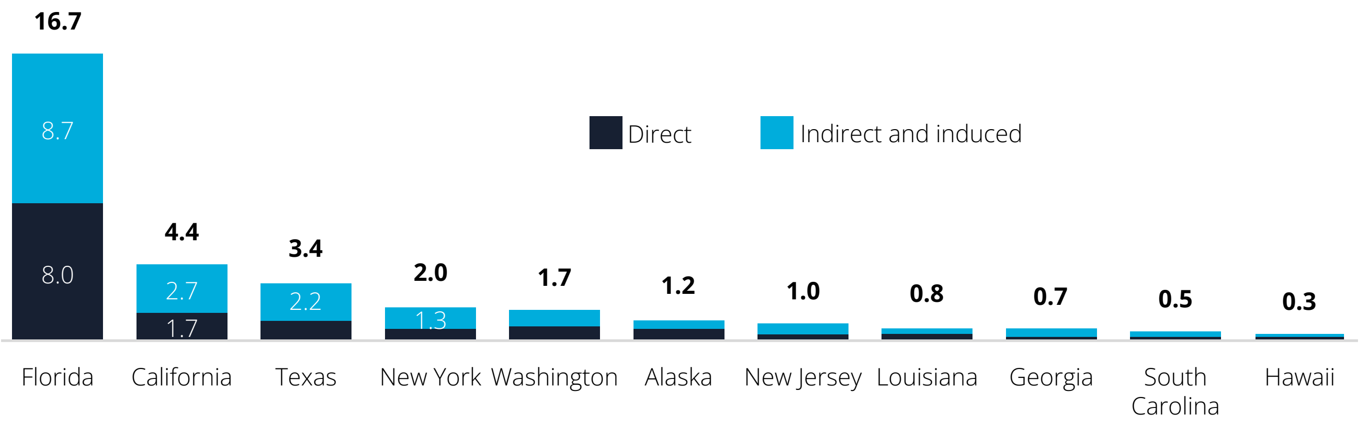
Fig. 15. Cruise industry GDP in the United States ($ billions)



Note: Values may not sum due to rounding
Source: Oxford Economics

GDP impacts by state largely reflected the rankings in industry output, with Florida emerging as the chief beneficiary. In 2024, cruise-linked activities contributed a total of $16.7 billion in Florida, distributed roughly equally across direct and indirect and induced channels. California and Texas completed the top three, with total cruise-linked GDP contributions of $4.4 billion and $3.4 billion, respectively.

Fig. 16. Cruise industry GDP by state, 2024 ($ billions)



Note: Values may not sum due to rounding
Source: Oxford Economics

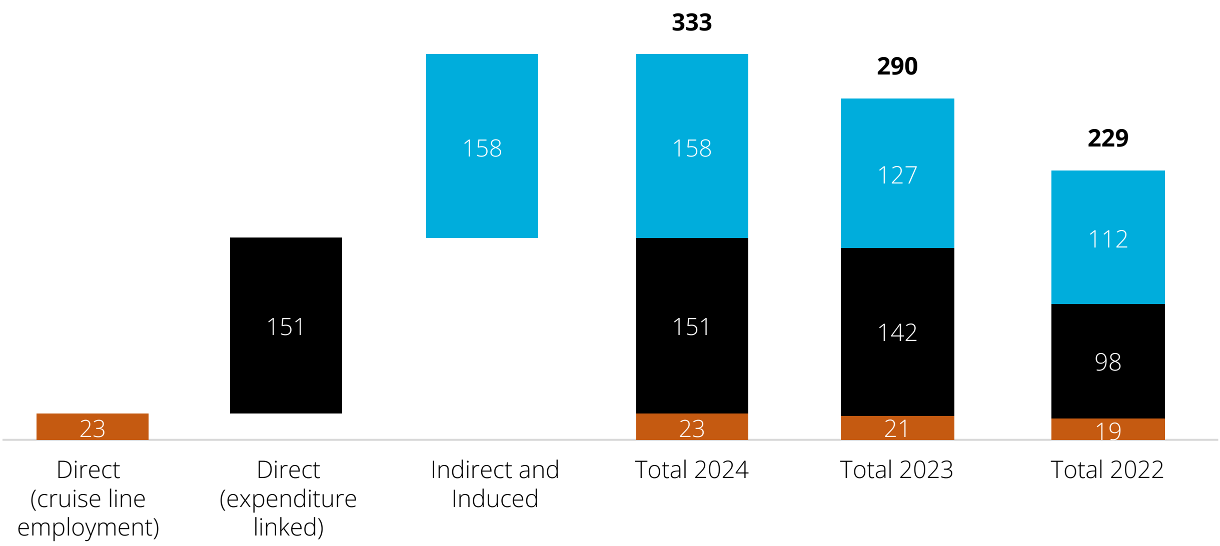
The cruise industry had the greatest GDP impact on Florida at **$16.7 billion,** followed by California with **$4.4 billion** and Texas at **$3.4 billion.**

Employment

Cruise industry activity supported around 333,000 jobs across the United States in 2024, an increase of 15% compared with 2023. This figure includes jobs with the cruise lines themselves, and employment supported by expenditure linked with industry activities through direct, indirect, and induced channels.

We estimate that around 23,000 jobs in the United States were provided directly by cruise lines in 2024. Furthermore, around 309,000 jobs were linked to the industry's activities in the United States. Of these jobs, around 151,000 were generated through direct impacts, while around 158,000 came through indirect and induced effects.

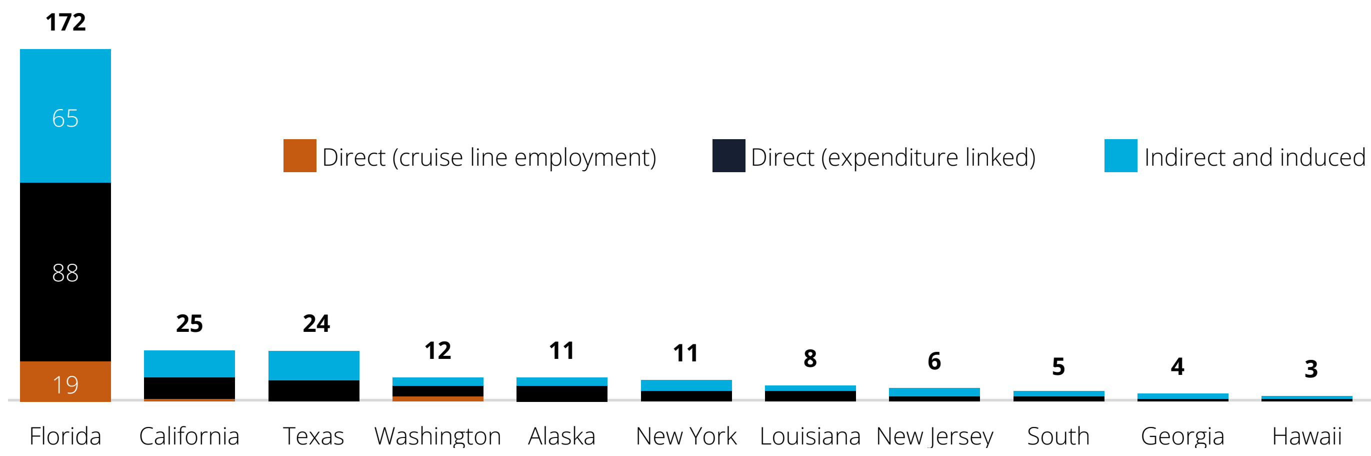
Fig. 17. Cruise industry employment impacts in the United States, (number of jobs, 000s)



Note: Values may not sum on due to rounding
Source: Oxford Economics

The cruise industry supported the largest number of jobs in Florida, generating an estimated 172,000 positions due to cruise-related activity in 2024. This reflects the state's role as the world's largest cruise hub, with major corporate headquarters, embarkation ports, a large customer base, and an extensive supplier network. Of these jobs, 62% were created directly, either through employment with cruise lines or activities linked to direct spending. California ranked second, with the industry supporting over 25,000 jobs, followed by Texas in third, with more than 24,000 jobs.

Fig. 18. Cruise industry employment by state, 2024 (number of jobs, 000s)

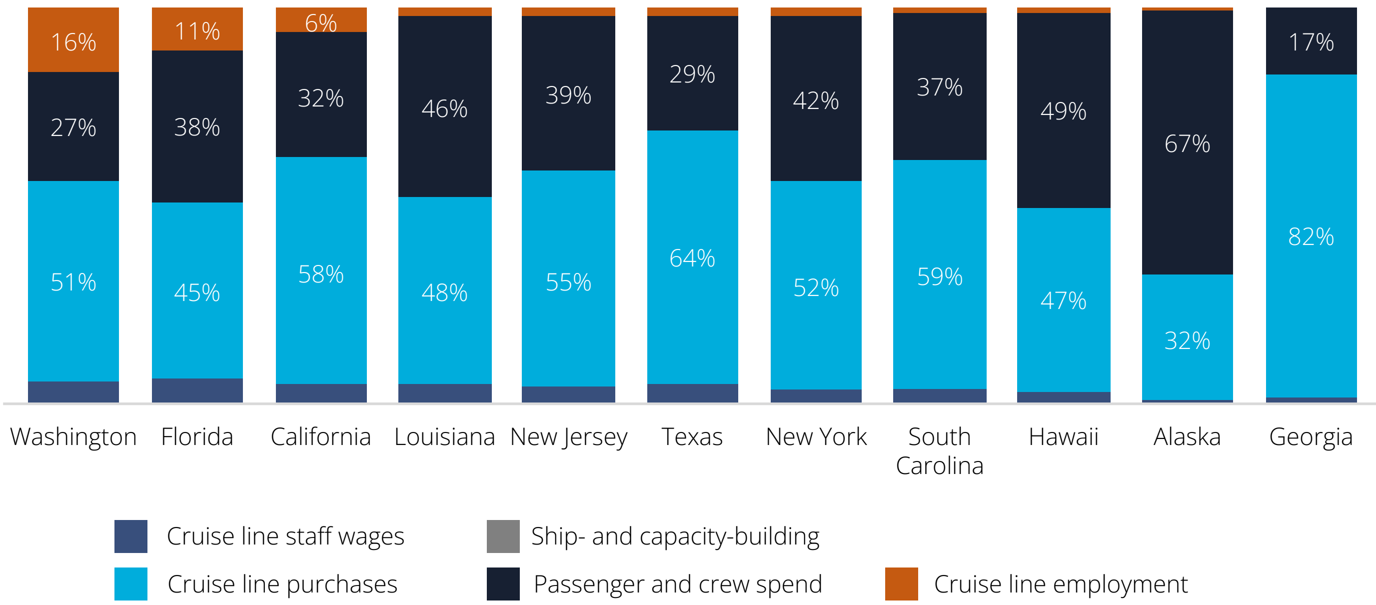


Note: Values may not sum on due to rounding
Source: Oxford Economics

Across the United States, cruise line purchases accounted for the largest share of industry-supported employment, reflecting the scale of operational procurement and supply-chain activity at major embarkation ports. Alaska is a notable exception, where passenger and crew spending accounted for the majority of employment impacts (67%), driven by its role as a transit destination where visitor expenditure, rather than procurement, dominates the local economy.

Among the 11 states analyzed in the study, Washington had the largest share of direct cruise line employment, accounting for 16% of supported jobs, driven by the presence of major corporate headquarters and shoreside operational centers.

Fig. 19. Share of cruise industry's employment impacts in the United States by channel and state, 2024

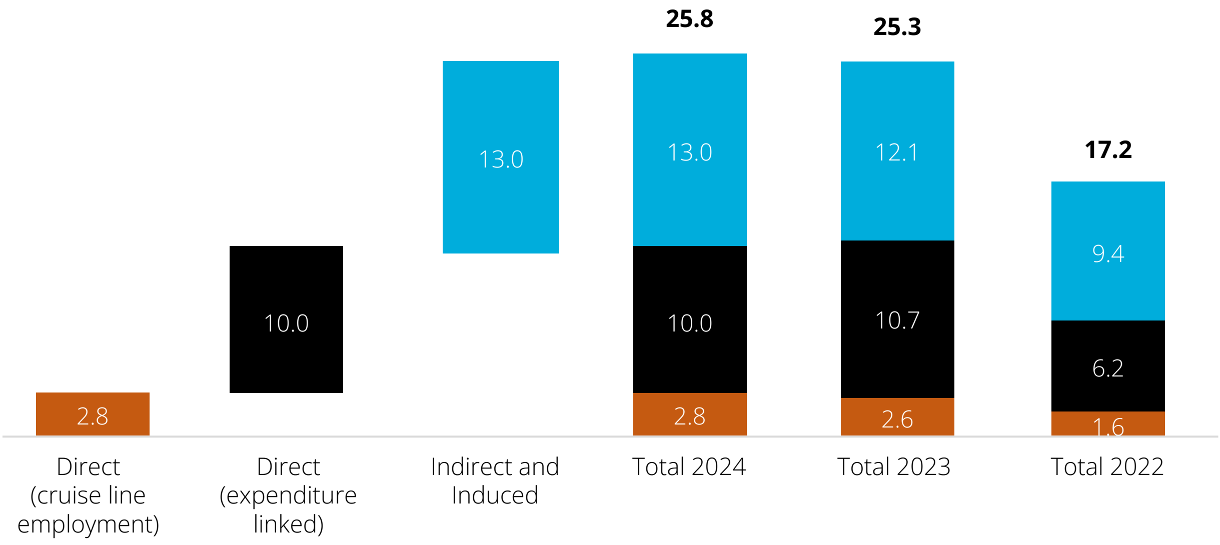


Note: Values may not sum on due to rounding
Source: Oxford Economics

Wages

Total wages supported by the industry in the United States equated to an estimated $25.8 billion in 2024, with $2.8 billion provided directly through cruise line employment, $10.0 billion through direct expenditure-linked impacts and a further $13.0 billion through indirect and induced channels.[5]

Fig. 20. Cruise industry wages in the United States, ($ billions)

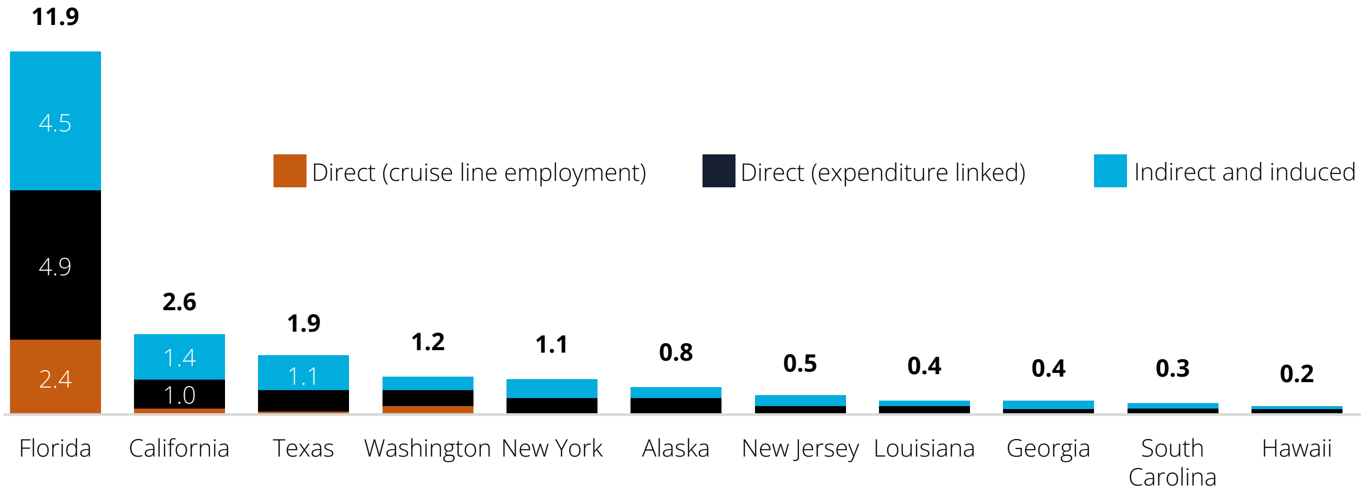


Note: Values may not sum due to rounding
Source: Oxford Economics

[5] Unlike output and GDP, but similar to employment, we include the impact of cruise line employment in our wage analysis as well as the impact of cruise linked spending.

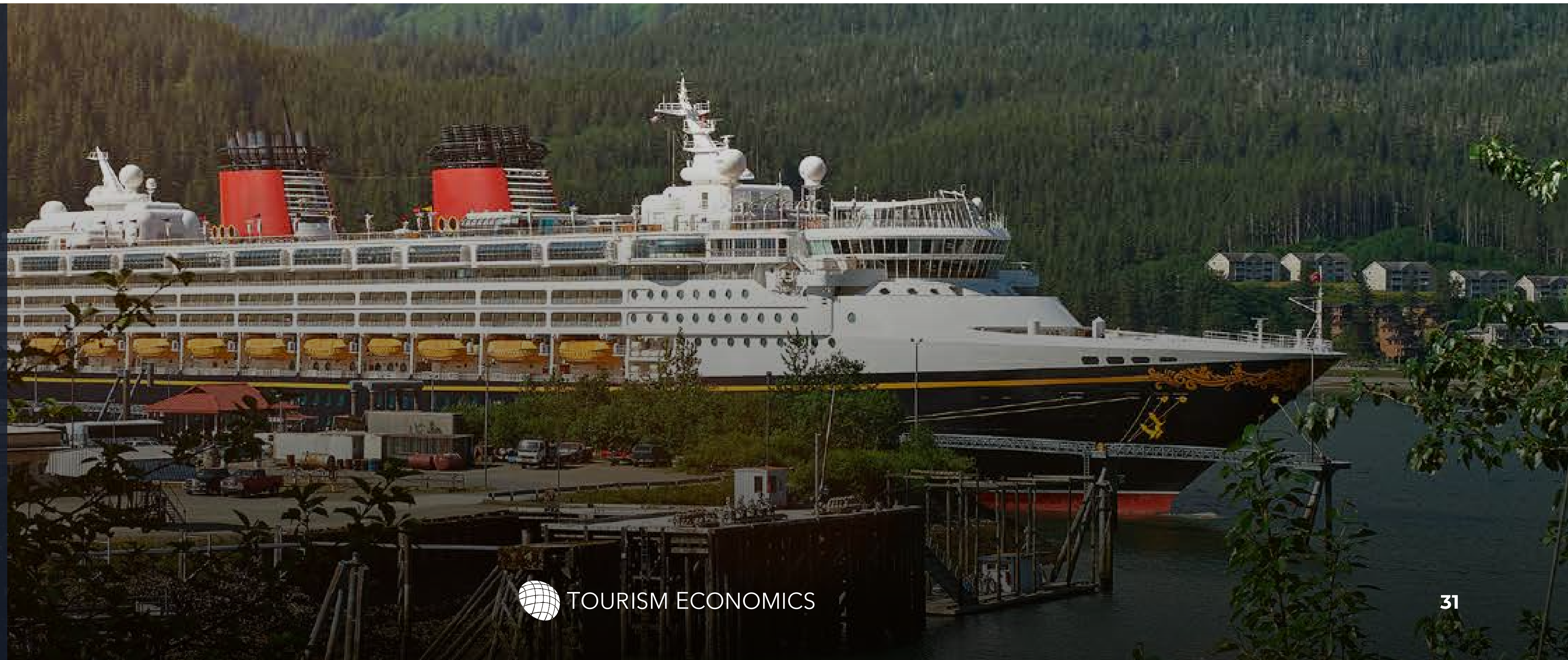
Florida recorded the largest total wage impact at $11.9 billion, including $2.4 billion from direct cruise line employment. California followed with a total wage impact of $2.6 billion, while Texas rounded out the top three at $1.9 billion. Among the states analyzed, Washington had the highest share of wage impacts from direct cruise line employment, at 21%.

Fig. 21. Cruise industry wages by state, 2024 ($ billions)



Note: Values may not sum due to rounding
Source: Oxford Economics

The cruise industry generated close to **$26 billion** worth of wage impacts in the United States in 2024.



Sectors

Cruise-linked spending supports economic activity across all major industry sectors in the United States.

The spending attributable to cruise line purchases and ship- and capacity-building spending totaled $20.1 billion, reflecting direct purchases from a broad range of US-based businesses supplying goods and services to the industry. The overwhelming majority of this spending stemmed from cruise line purchases.

This spending includes an estimated $3.5 billion on information services and another $3.3 billion on administrative and support services, supporting 3,900 and 14,300 jobs, respectively. It also includes spending of $3.2 billion among manufacturing businesses, including $1.5 billion for providers of petroleum and coal products, and $390 million for transportation equipment producers. This manufacturing-related spending supported 4,700 direct jobs in the manufacturing sector, earning around $400 million in wages.

Meanwhile, of the $10.0 billion cruise-related direct spending by passengers and crew, $5.1 billion was on transportation services, such as air fares, and $2.6 billion on accommodation and food services. Combined, this spend supported over 50,000 jobs and wages of close to $3 billion. The remainder of this spending benefited the retail trade and arts, entertainment and recreation sectors.

Cruise-related direct spending in the United States generated economic impacts for all sectors. This included supporting over **50,000 jobs** overall in the transportation and accommodation and food services sectors and over **20,000 jobs** overall in the information, administrative, and manufacturing sectors.

Fig. 22. Cruise industry direct impacts by sector, 2024

	Spending ($ mn)	Employment (Jobs)	Wages ($ mn)
Cruise line purchases, ship- and capacity-building			
Information	3,540	3,900	806
Administrative and support services	3,334	14,300	891
Manufacturing	3,229	4,700	401
Petroleum & coal products	1,532	1,200	106
Transportation equipment	391	900	53
Food	379	800	49
Machinery	203	500	45
Computer and electronic product	183	300	38
Electrical equipment and component	152	200	34
Fabricated metal product	107	200	19
Other	284	600	58
Professional, scientific and technical services	2,905	12,200	1,078
Transportation and warehousing	1,930	12,700	612
Retail trade	1,196	9,600	438
Finance, insurance and real estate	1,109	7,900	619
Wholesale trade	739	1,600	174
Accommodation and food services	165	2,100	90
Agriculture, forestry, mining and construction	95	500	31
Other	1,899	16,600	1,239
Total	**20,140**	**86,000**	**6,379**
Passenger and crew spending			
Transportation	5,106	29,700	1,996
Accommodation and food services	2,581	20,700	958
Arts, entertainment and recreation	1,715	9,900	425
Retail trade	593	4,700	241
Total	**9,995**	**65,000**	**3,620**
Cruise line staff wages			
Cruise line employment	**2,819**	**23,300**	**2,837**
Total			
Total	**32,954**	**174,400**	**12,837**

Note: Values may not sum due to rounding
Source: Oxford Economics

Direct cruise-linked spending generates wider economic impacts across the economy of the United States. As cruise line suppliers purchase inputs, this activity supports additional production and spending further down the supply chain, including manufacturing, information sectors such as publishing and broadcasting, and services in finance, real estate, and professional services. In addition, as employees in directly supported jobs spend a portion of their wages on goods and services, further economic activity is generated across a wide range of US-based businesses, which in turn creates additional demand throughout the domestic supply chain.

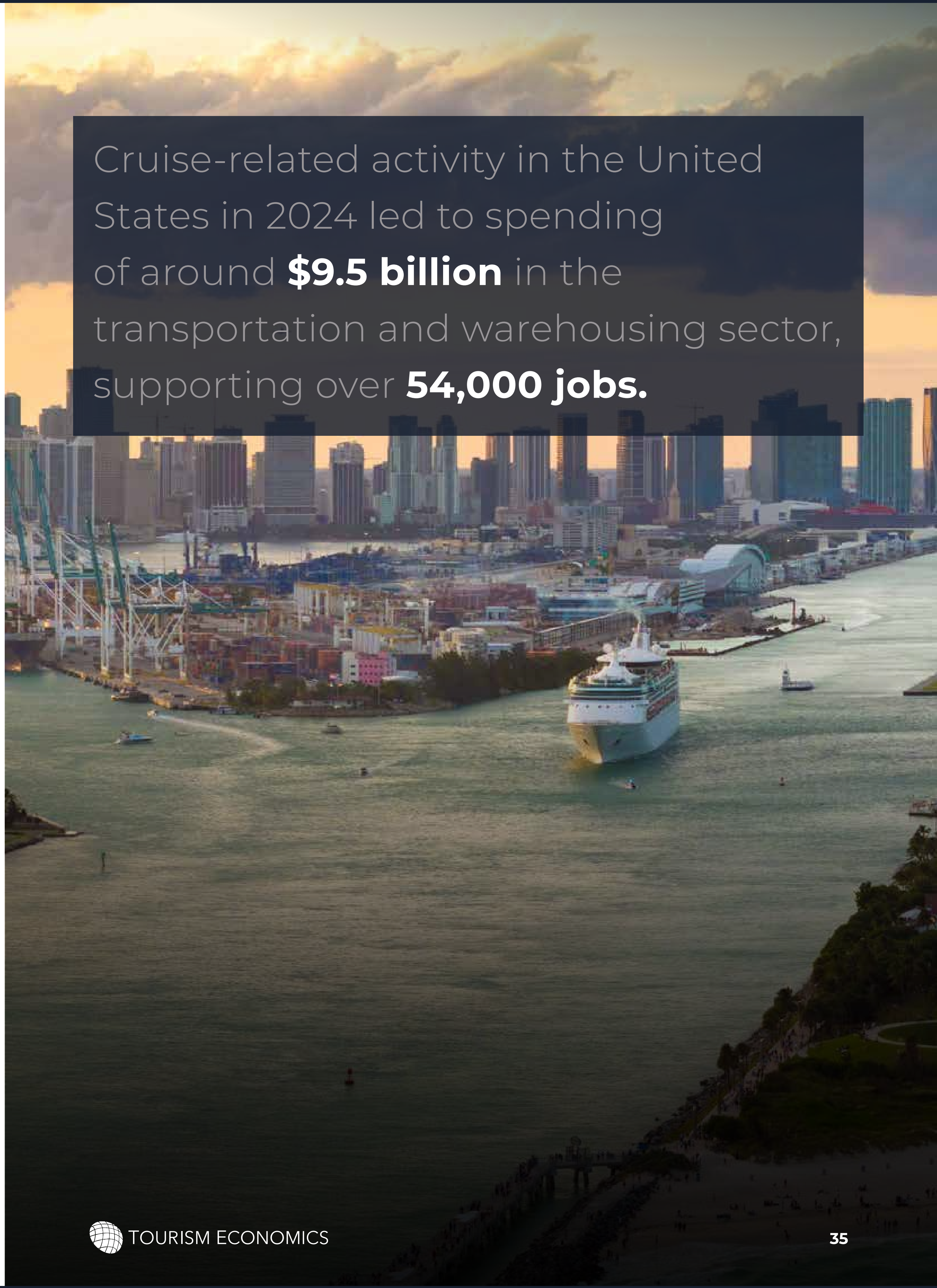
Linked to these indirect and induced impacts, the largest overall output impacts were in finance, insurance and real estate sectors at $10.2 billion, followed by the transportation and warehousing and manufacturing sectors at $9.5 billion and $8.8 billion, respectively. For the transportation and warehousing sector, this level of economic activity supported over 54,000 jobs and around $3.5 billion in wages.

Fig. 23. Cruise industry total impacts by sector, 2024

	Spending ($ mn)	Employment (Jobs)	Wages ($ mn)
Cruise line purchases, ship- and capacity-building, passenger and crew spending			
Finance, insurance and real estate	10,211	28,300	2,266
Transportation and warehousing	9,493	54,400	3,523
Manufacturing	8,809	11,700	1,133
Information	7,889	8,000	1,671
Administrative and support services	6,737	32,700	2,506
Professional, scientific and technical services	6,124	23,200	2,516
Accommodation and food services	4,793	38,600	1,671
Retail trade	3,946	29,600	1,373
Agriculture, forestry, mining and construction	3,041	5,500	483
Wholesale trade	2,983	5,900	704
Arts, entertainment and recreation	1,236	10,800	525
Other	6,313	45,100	3,405
Total	**71,575**	**293,700**	**21,777**
Cruise line staff wages			
Cruise line employment	**3,921**	**39,000**	**4,038**
Total			
Total	**75,496**	**332,700**	**25,815**

Note: Values may not sum due to rounding

Source: Oxford Economics



US STATE PROFILES

US STATE PROFILES

FLORIDA

The cruise industry supported 172,000 jobs and generated a total output impact of $30.2 billion in Florida in 2024.

Florida was the primary state benefiting from cruise activity in the Unted States in 2024, accounting for 22.7 million passenger visits and more than 60% of total embarkation activity nationwide. Florida's ports, three of which rank among the world's top ten, are the main gateway to the Caribbean, the largest cruise region globally. In addition, the state hosts the headquarters of several leading international cruise operators, supporting jobs both directly and indirectly.

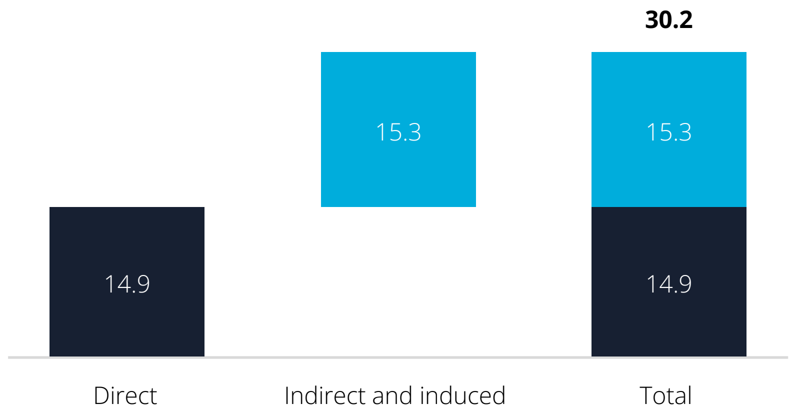
The launch and deployment of new large vessels to ports within the state in recent years has further reinforced Florida's position as the world's leading cruise region for passenger embarkation. Further underscoring the state's strong connection with cruising, Florida residents represented around 18% of US-resident cruisers in 2024.

Florida's cruise industry supported **172,000 jobs** in 2024 and generated **$30 billion** in total output impacts.

Output

In Florida, cruise-related activity supported $30.2 billion worth of total output impacts in 2024. This includes $14.9 billion in direct impacts and $15.3 billion from indirect and induced effects.

Fig. 24. Cruise industry output in Florida, 2024 ($ billions)

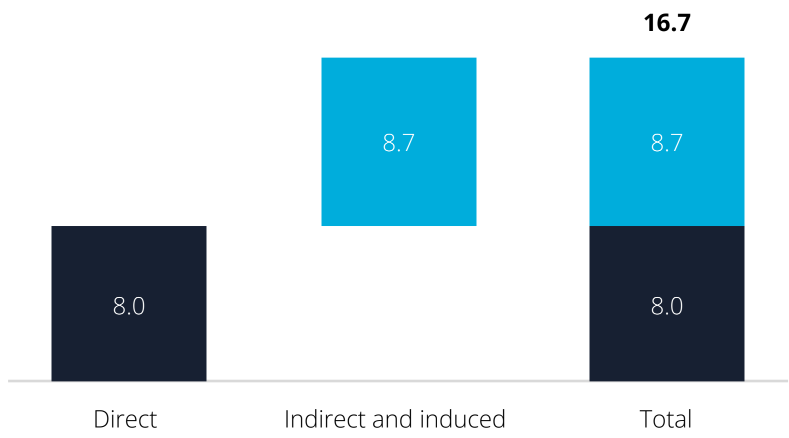


Note: Values may not sum due to rounding
Source: Oxford Economics

GDP

Total GDP supported by activity related to the cruise industry was $16.7 billion in 2024, including $8.0 billion from direct effects and an additional $8.7 billion due to indirect and induced effects.

Fig. 25. Cruise industry GDP in Florida, 2024 ($ billions)

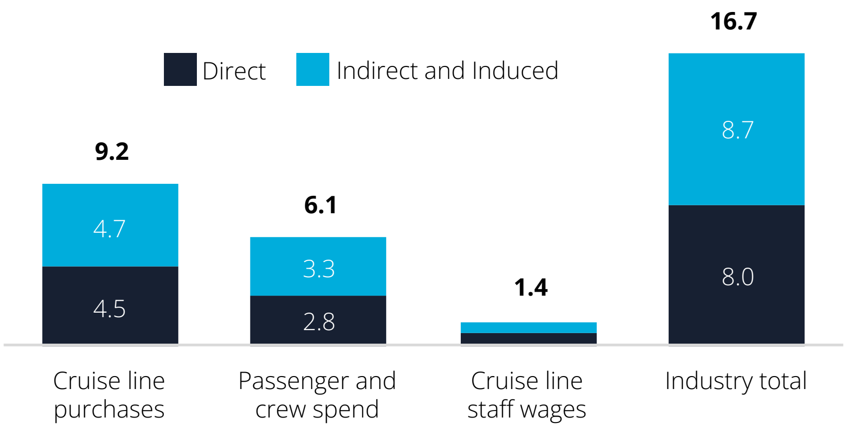


Note: Values may not sum due to rounding
Source: Oxford Economics

The cruise industry's economic impact came from three key activities: cruise line purchases, passenger and crew spending in port destinations, and wage-linked spending of cruise industry staff residing in Florida.

Cruise line purchases were the largest contributor to GDP in Florida, generating $9.2 billion and accounting for 55% of the industry's total GDP impact. Passenger and crew spend followed, contributing $6.1 billion, while cruise line-staff wages had the smallest impact contributing $1.4 billion.

Fig. 26. Composition of cruise industry GDP and impact channel in Florida, 2024 ($ billions)



Note: Values may not sum due to rounding
Source: Oxford Economics

Fig. 27. Cruise industry GDP in Florida versus other US states, 2024

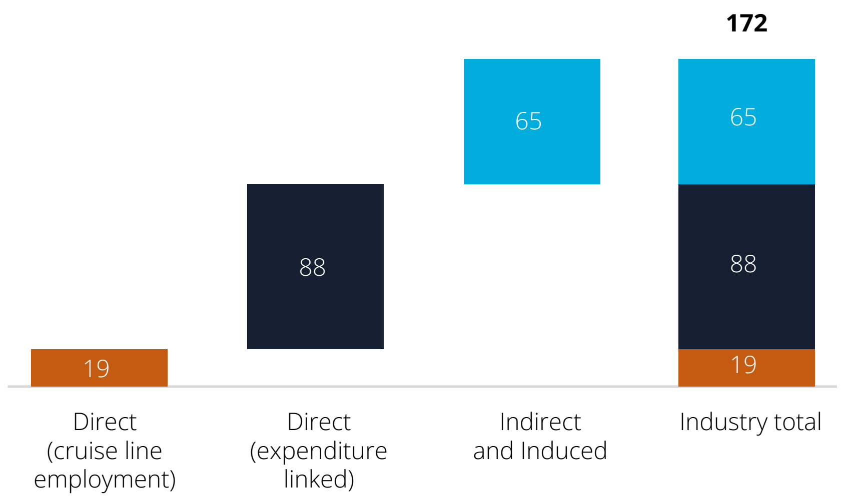
		Total GDP ($ mn)	% US Total
1	**Florida**	**16,707**	**40.3%**
2	California	4,433	10.7%
3	Texas	3,405	8.2%
4	New York	1,986	4.8%
5	Washington	1,736	4.2%
6	Alaska	1,206	2.9%
7	New Jersey	980	2.4%
8	Louisiana	768	1.9%
9	Georgia	722	1.7%
14	South Carolina	537	1.3%
21	Hawaii	314	0.8%
	Rest of United States	*8,634*	*20.8%*
	United States	**41,428**	**100.0%**

Note: Values may not sum due to rounding
Source: Oxford Economics

Employment

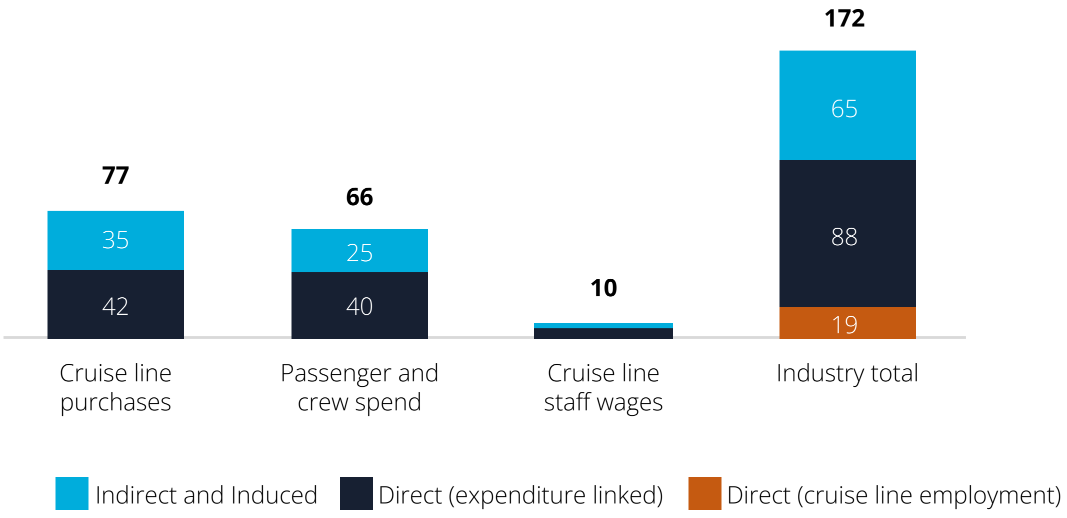
Cruise line employment, which includes both crew and head office employees, accounted for an estimated 19,000 jobs in Florida in 2024. In addition, cruise lines also created jobs in the wider economy, with a total of 153,000 jobs created through direct, indirect, and induced impacts resulting from expenditure linked to the cruise industry. Cruise line purchases generated the largest employment impact of around 77,000 jobs, followed by passenger and crew spend at 66,000 jobs.

Fig. 28. Cruise industry employment in Florida, 2024 (number of jobs, 000s)



Note: Values may not sum due to rounding
Source: Oxford Economics

Fig. 29. Composition of cruise industry employment and impact channel in Florida, 2024 (number of jobs, 000s)



Note: Values may not sum due to rounding
Source: Oxford Economics

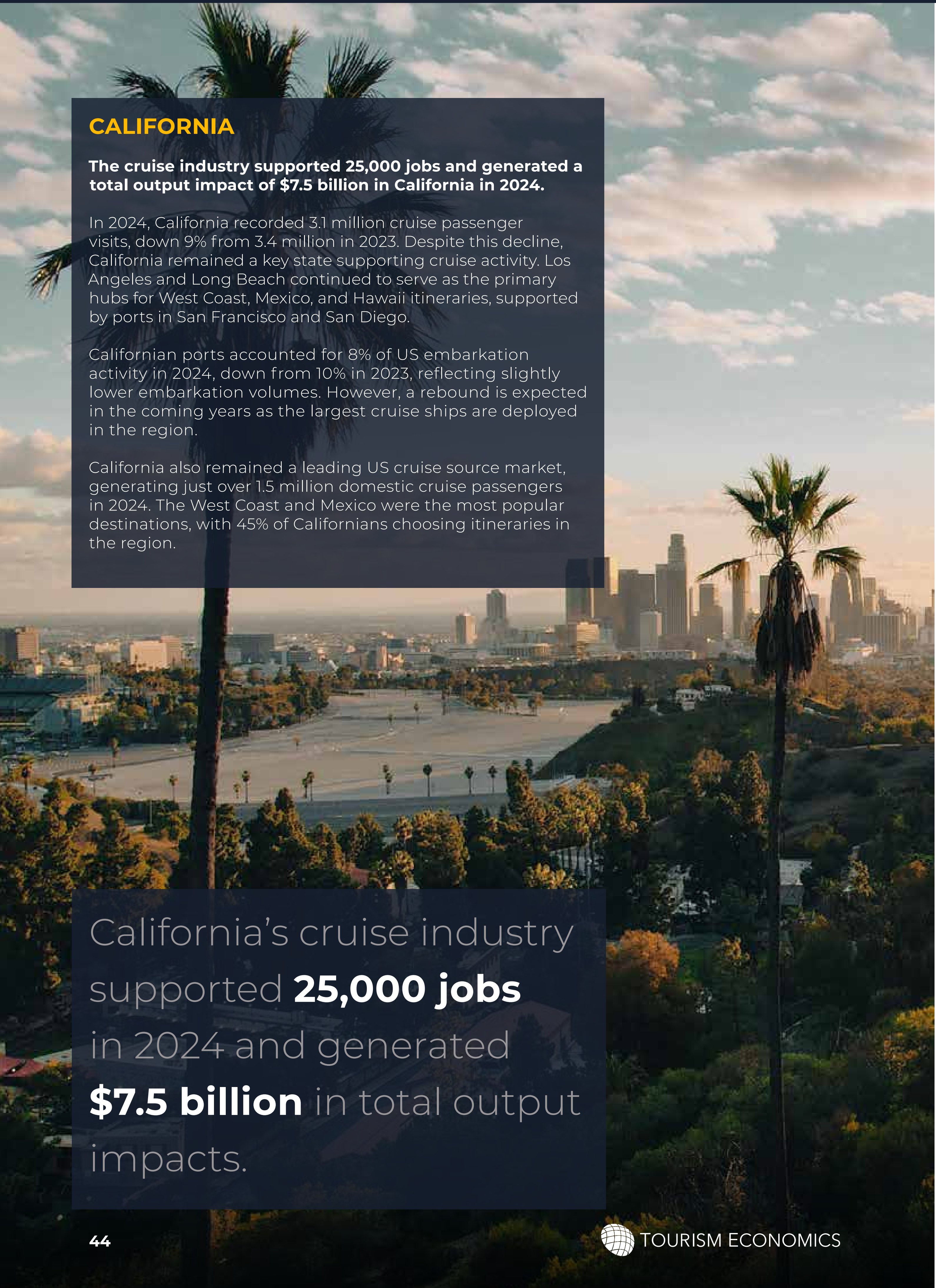
Summary of Impacts

Fig. 30. Summary of cruise industry activity and impacts in Florida, 2024[6]

		Florida	United States
Passenger flows (000s)	Transit visits	1,619	11,308
	Embark	10,523	17,194
	Debark	10,526	17,227
	Total cruise visits	**22,668**	**45,729**
Spend ($ Billions)	Passenger and crew spend	5.2	10.0
	Cruise line purchases	9.2	20.1
	Ship- and capacity-building	-	<0.1
	Cruise line staff wages	2.4	2.8
	Total spend	**16.8**	**33.0**
Output ($ Billions)	Direct	14.9	31.8
	Indirect and induced	15.3	43.7
	Total output	**30.2**	**75.5**
GDP ($ Billions)	Direct	8.0	16.6
	Indirect and induced	8.7	24.8
	Total GDP	**16.7**	**41.4**
Employment (Jobs, 000s)	Direct (cruise line employment)	19	23
	Direct (expenditure linked)	88	151
	Indirect and Induced	65	158
	Total employment	**172**	**333**

Note: Values may not sum due to rounding
Source: Oxford Economics

[6] Whilst debarkations are included in the total passengers' figure, only transit and embarkations have been taken into account for economic impact calculations.



CALIFORNIA

The cruise industry supported 25,000 jobs and generated a total output impact of $7.5 billion in California in 2024.

In 2024, California recorded 3.1 million cruise passenger visits, down 9% from 3.4 million in 2023. Despite this decline, California remained a key state supporting cruise activity. Los Angeles and Long Beach continued to serve as the primary hubs for West Coast, Mexico, and Hawaii itineraries, supported by ports in San Francisco and San Diego.

Californian ports accounted for 8% of US embarkation activity in 2024, down from 10% in 2023, reflecting slightly lower embarkation volumes. However, a rebound is expected in the coming years as the largest cruise ships are deployed in the region.

California also remained a leading US cruise source market, generating just over 1.5 million domestic cruise passengers in 2024. The West Coast and Mexico were the most popular destinations, with 45% of Californians choosing itineraries in the region.

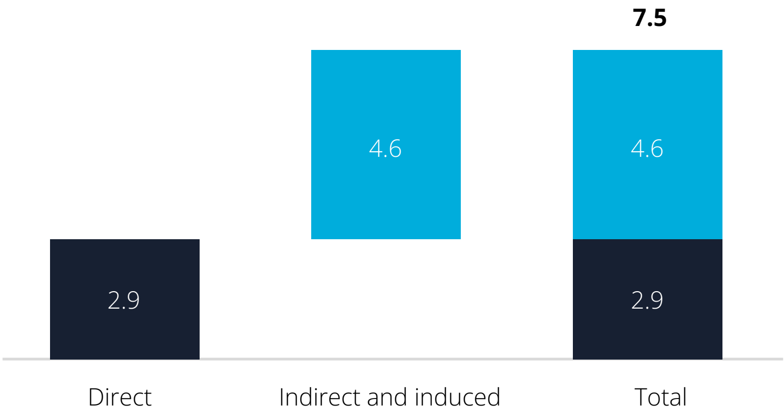
California's cruise industry supported **25,000 jobs** in 2024 and generated **$7.5 billion** in total output impacts.

Output

In California, cruise-related activity supported $7.5 billion worth of total output impacts in 2024. This includes $2.9 billion in direct impacts and $4.6 billion from indirect and induced effects.

California stands out as a state with relatively larger supply-chain impacts than others, reflecting both the scale and diversity of its economy and its capacity to support cruise-related activity. The state captures a higher share of cruise line procurement and operational spending, particularly in logistics, professional services, and port-related activities, which amplify indirect and induced effects across the wider state economy.

Fig. 31. Cruise industry output in California, 2024 ($ billions)

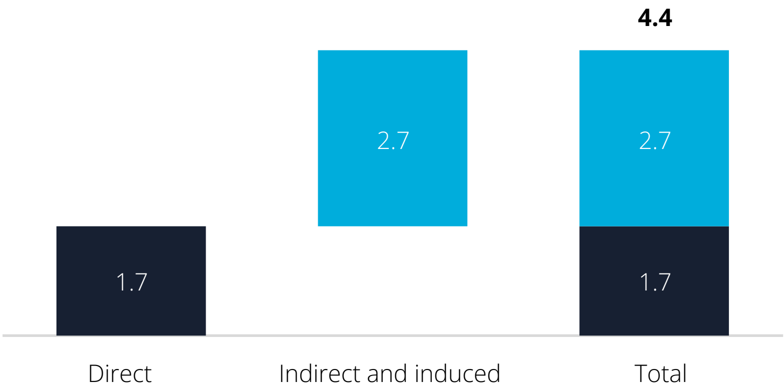


Note: Values may not sum due to rounding
Source: Oxford Economics

GDP

Total GDP supported by activity related to the cruise industry was $4.4 billion in 2024, including $1.7 billion from direct effects and an additional $2.7 billion due to indirect and induced effects.

Fig. 32. Cruise industry GDP in California, 2024 ($ billions)

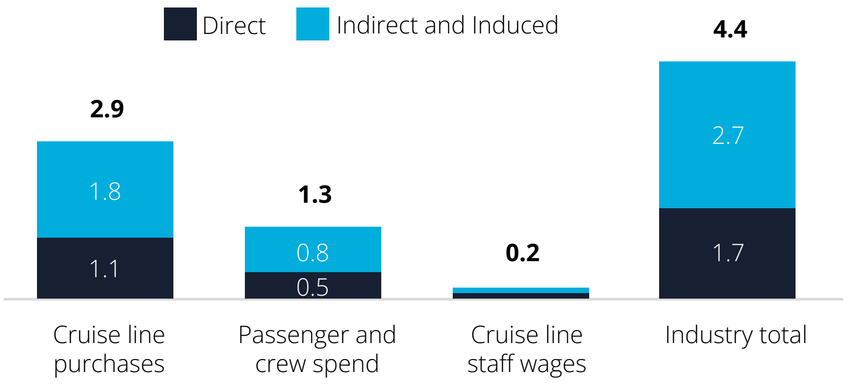


Note: Values may not sum due to rounding
Source: Oxford Economics

The cruise industry's economic impact came from three key activities: cruise line purchases, passenger and crew spending in port destinations, and wage-linked spending of cruise industry staff residing in California.

Cruise line purchases were the largest contributor to GDP in California, generating $2.9 billion and accounting for 66% of the industry's total GDP impact. Passenger and crew spend followed, contributing $1.3 billion, while cruise line-staff wages had the smallest impact contributing $0.2 billion.

Fig. 33. Composition of cruise industry GDP and impact channel in California, 2024 ($ billions)



Note: Values may not sum due to rounding
Source: Oxford Economics

Fig. 34. Cruise industry GDP in California versus other US states, 2024

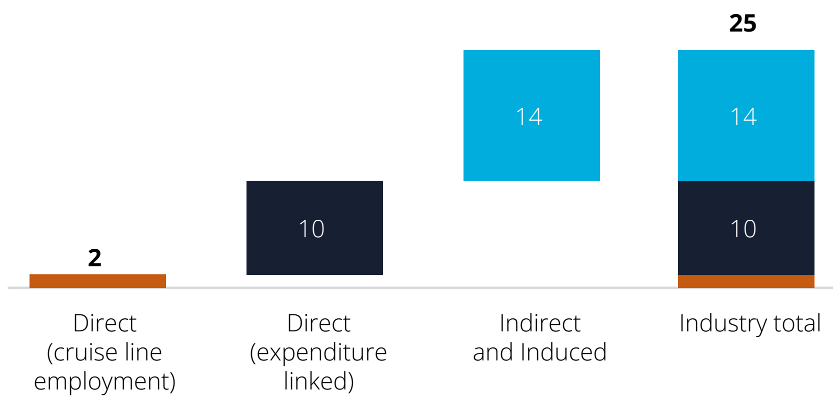
		Total GDP ($ mn)	% US Total
1	Florida	16,707	40.3%
2	**California**	**4,433**	**10.7%**
3	Texas	3,405	8.2%
4	New York	1,986	4.8%
5	Washington	1,736	4.2%
6	Alaska	1,206	2.9%
7	New Jersey	980	2.4%
8	Louisiana	768	1.9%
9	Georgia	722	1.7%
14	South Carolina	537	1.3%
21	Hawaii	314	0.8%
	Rest of United States	*8,634*	*20.8%*
	United States	**41,428**	**100.0%**

Note: Values may not sum due to rounding
Source: Oxford Economics

Employment

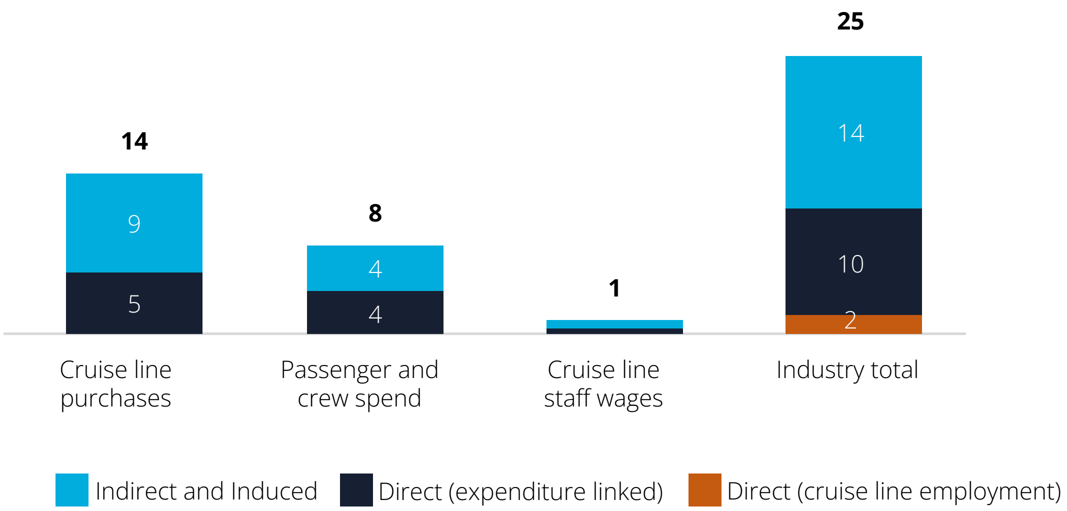
Cruise line employment, which includes both crew and head office employees, accounted for an estimated 2,000 jobs in California in 2024. In addition, cruise lines also created jobs in the wider economy, with a total of 23,000 jobs created through direct, indirect, and induced impacts resulting from expenditure linked to the cruise industry. Cruise line purchases generated the largest employment impact of around 14,000 jobs.

Fig. 35. Cruise industry employment in California, 2024 (number of jobs, 000s)



Note: Values may not sum due to rounding
Source: Oxford Economics

Fig. 36. Composition of cruise industry employment and impact channel in California, 2024 (number of jobs, 000s)



Note: Values may not sum due to rounding
Source: Oxford Economics

Summary of Impacts

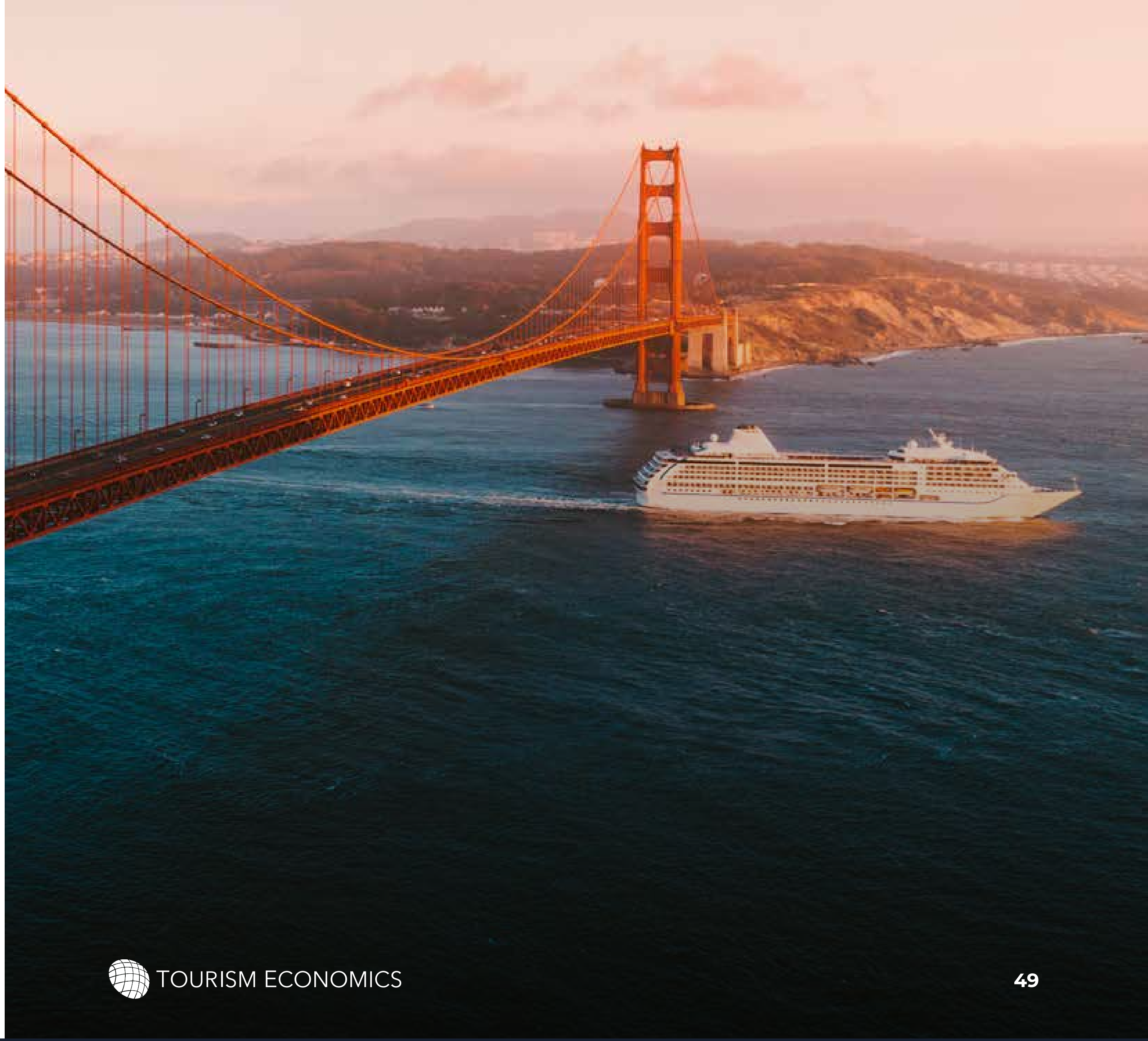
Fig. 37. Summary of cruise industry activity and impacts in California, 2024[7]

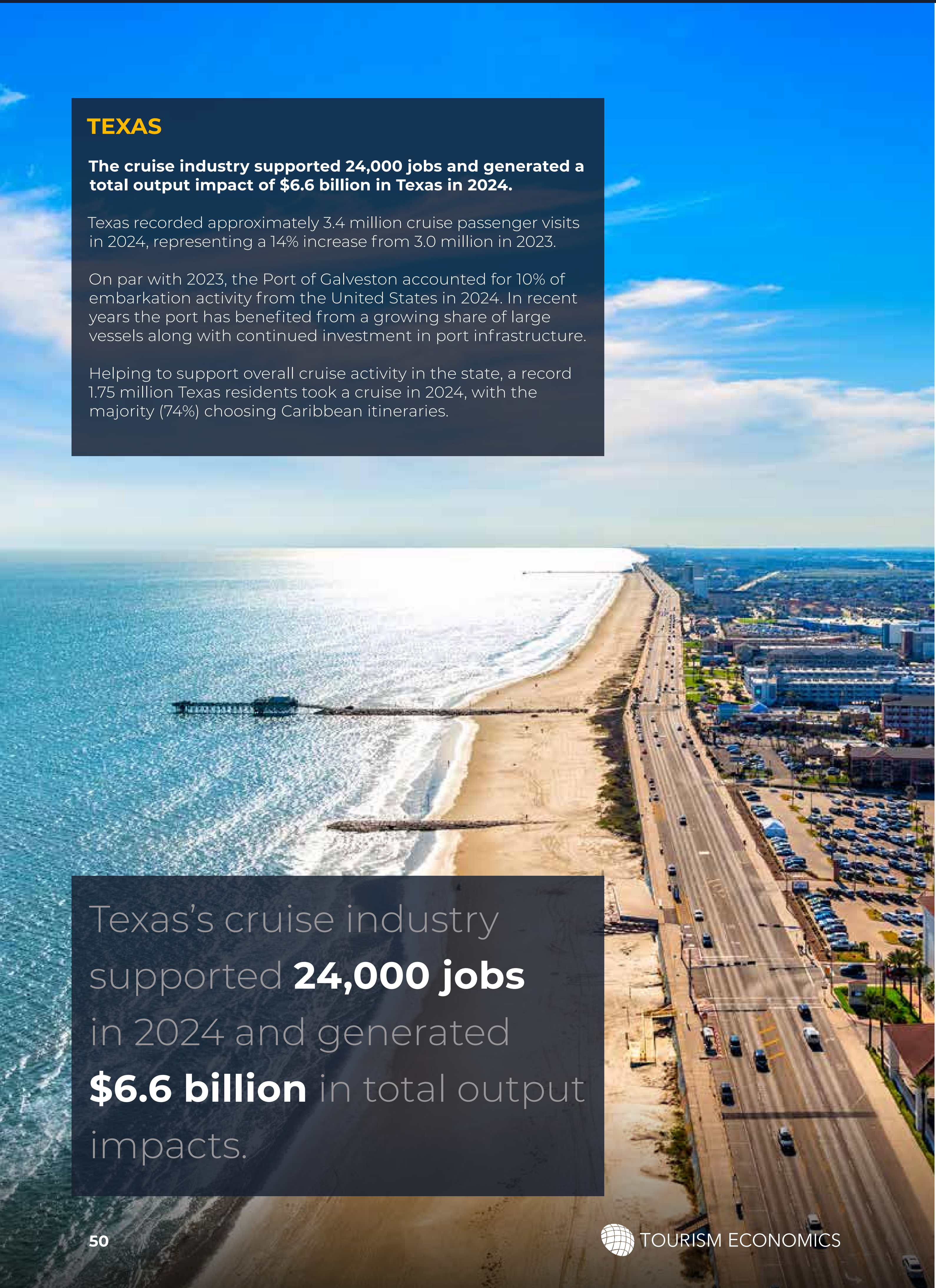
		California	United States
Passenger flows (000s)	Transit visits	197	11,308
	Embark	1,441	17,194
	Debark	1,455	17,227
	Total cruise visits	**3,093**	**45,729**
Spend ($ Billions)	Passenger and crew spend	0.8	10.0
	Cruise line purchases	1.8	20.1
	Ship- and capacity-building	-	<0.1
	Cruise line staff wages	0.2	2.8
	Total spend	**2.8**	**33.0**
Output ($ Billions)	Direct	2.9	31.8
	Indirect and induced	4.6	43.7
	Total output	**7.5**	**75.5**
GDP ($ Billions)	Direct	1.7	16.6
	Indirect and induced	2.7	24.8
	Total GDP	**4.4**	**41.4**
Employment (Jobs, 000s)	Direct (cruise line employment)	2	23
	Direct (expenditure linked)	10	151
	Indirect and Induced	14	158
	Total employment	**25**	**333**

Note: Values may not sum due to rounding
Source: Oxford Economics

[7] Whilst debarkations are included in the total passengers' figure, only transit and embarkations have been taken into account for economic impact calculations.

In 2024, California's cruise industry supported **$7.5 billion** in total economic output, of which **$2.9 billion** was direct output and **$4.6 billion** was generated from indirect and induced channels.





TEXAS

The cruise industry supported 24,000 jobs and generated a total output impact of $6.6 billion in Texas in 2024.

Texas recorded approximately 3.4 million cruise passenger visits in 2024, representing a 14% increase from 3.0 million in 2023.

On par with 2023, the Port of Galveston accounted for 10% of embarkation activity from the United States in 2024. In recent years the port has benefited from a growing share of large vessels along with continued investment in port infrastructure.

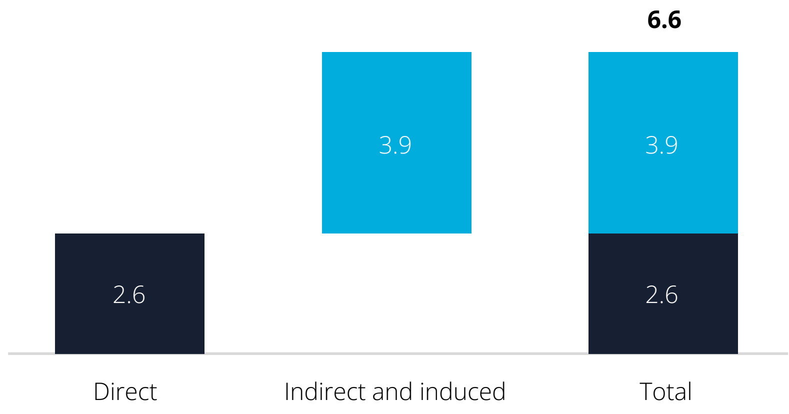
Helping to support overall cruise activity in the state, a record 1.75 million Texas residents took a cruise in 2024, with the majority (74%) choosing Caribbean itineraries.

Texas's cruise industry supported **24,000 jobs** in 2024 and generated **$6.6 billion** in total output impacts.

Output

In Texas, cruise-related activity supported $6.6 billion worth of total output impacts in 2024. This includes $2.6 billion in direct impacts and $3.9 billion from indirect and induced effects.

Fig. 38. Cruise industry output in Texas, 2024 ($ billions)



Note: Values may not sum due to rounding
Source: Oxford Economics

GDP

Total GDP supported by activity related to the cruise industry was $3.4 billion in 2024, including $1.2 billion from direct effects and an additional $2.2 billion due to indirect and induced effects.

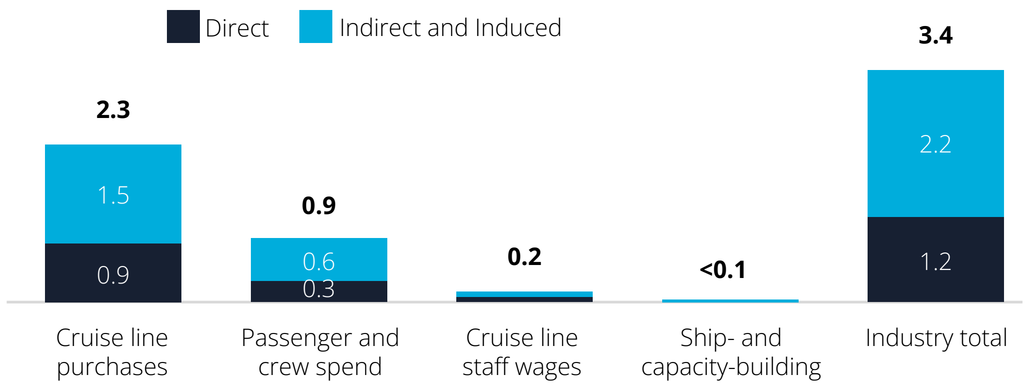
Fig. 39. Cruise industry GDP in Texas, 2024 ($ billions)

Note: Values may not sum due to rounding
Source: Oxford Economics

The cruise industry's economic impact came from four key activities: cruise line purchases, passenger and crew spending in port destinations, wage-linked spending of cruise industry staff residing in Texas, and ship- and-capacity building.

Cruise line purchases were the largest contributor to GDP in Texas, generating $2.3 billion and accounting for 68% of the industry's total GDP impact. The next largest spending channel was passenger and crew spend, contributing $0.9 billion, followed by cruise line-staff wages ($0.2 billion), while ship- and capacity-building had the smallest impact contributing $3 million.

Fig. 40. Composition of cruise industry GDP and impact channel in Texas, 2024 ($ billions)



Note: Values may not sum due to rounding
Source: Oxford Economics

Fig. 41. Cruise industry GDP in Texas versus other US states, 2024

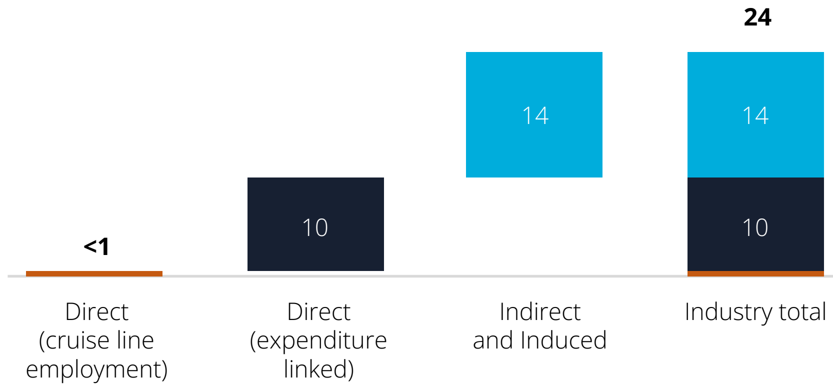
		Total GDP ($ mn)	% US Total
1	Florida	16,707	40.3%
2	California	4,433	10.7%
3	**Texas**	**3,405**	**8.2%**
4	New York	1,986	4.8%
5	Washington	1,736	4.2%
6	Alaska	1,206	2.9%
7	New Jersey	980	2.4%
8	Louisiana	768	1.9%
9	Georgia	722	1.7%
14	South Carolina	537	1.3%
21	Hawaii	314	0.8%
	Rest of United States	*8,634*	*20.8%*
	United States	**41,428**	**100.0%**

Note: Values may not sum due to rounding
Source: Oxford Economics

Employment

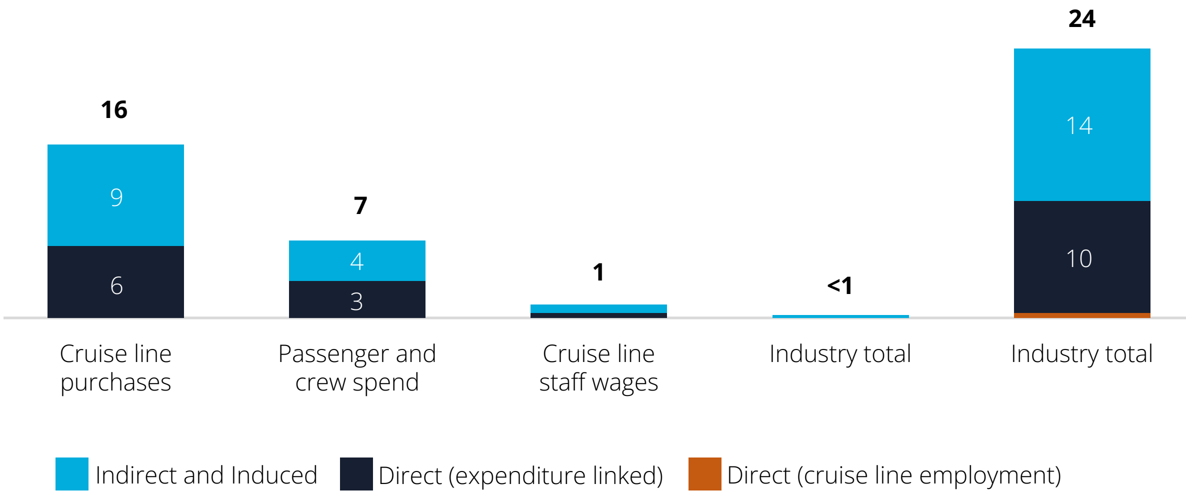
Cruise line employment, which includes both crew and head office employees, accounted for an estimated 500 jobs in Texas in 2024. In addition, cruise lines also created jobs in the wider economy, with a total of 24,000 jobs created through direct, indirect, and induced impacts resulting from expenditure linked to the cruise industry. Cruise line purchases generated the largest employment impact of around 16,000 jobs.

Fig. 42. Cruise industry employment in Texas, 2024 (number of jobs, 000s)



Note: Values may not sum due to rounding
Source: Oxford Economics

Fig. 43. Composition of cruise industry employment and impact channel in Texas, 2024 (number of jobs, 000s)



Note: Values may not sum due to rounding
Source: Oxford Economics

Summary of Impacts

Fig. 44. Summary of cruise industry activity and impacts in Texas, 2024[8]

		Texas	United States
Passenger flows (000s)	Transit visits	-	11,308
	Embark	1,694	17,194
	Debark	1,706	17,227
	Total cruise visits	**3,400**	**45,729**
Spend ($ Billions)	Passenger and crew spend	0.6	10.0
	Cruise line purchases	1.7	20.1
	Ship- and capacity-building	<0.1	<0.1
	Cruise line staff wages	<0.1	2.8
	Total spend	**2.3**	**33.0**
Output ($ Billions)	Direct	2.6	31.8
	Indirect and induced	3.9	43.7
	Total output	**6.6**	**75.5**
GDP ($ Billions)	Direct	1.2	16.6
	Indirect and induced	2.2	24.8
	Total GDP	**3.4**	**41.4**
Employment (Jobs, 000s)	Direct (cruise line employment)	<1	23
	Direct (expenditure linked)	10	151
	Indirect and Induced	14	158
	Total employment	**24**	**333**

Note: Values may not sum due to rounding
Source: Oxford Economics

[8] Whilst debarkations are included in the total passengers' figure, only transit and embarkations have been taken into account for economic impact calculations.

In 2024, Texas's cruise industry supported **$6.6 billion** in total economic output, of which **$2.6 billion** was direct output and **$3.9 billion** was generated from indirect and induced channels.

NEW YORK

The cruise industry supported 11,000 jobs and generated a total output impact of $3.3 billion in New York state in 2024.

In 2024, New York recorded 1.5 million cruise passenger visits, an increase of 9% compared with 2023.

More than 730,000 New York residents took a cruise during the year, up slightly from 720,000 in 2023. Consistent with previous years, most New Yorkers chose Caribbean itineraries.

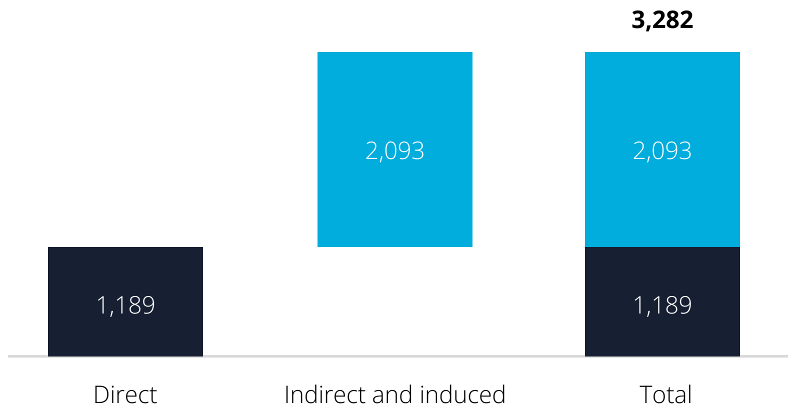
Two cruise terminals in New York City provide itineraries to Bermuda, the Caribbean, and Canada–New England.

New York's cruise industry supported **11,000 jobs** in 2024 and generated **$3.3 billion** in total output impacts.

Output

In New York, cruise-related activity supported $3.3 billion worth of total output impacts in 2024. This includes $1.2 billion in direct impacts and $2.1 billion from indirect and induced effects.

Fig. 45. Cruise industry output in New York, 2024 ($ millions)

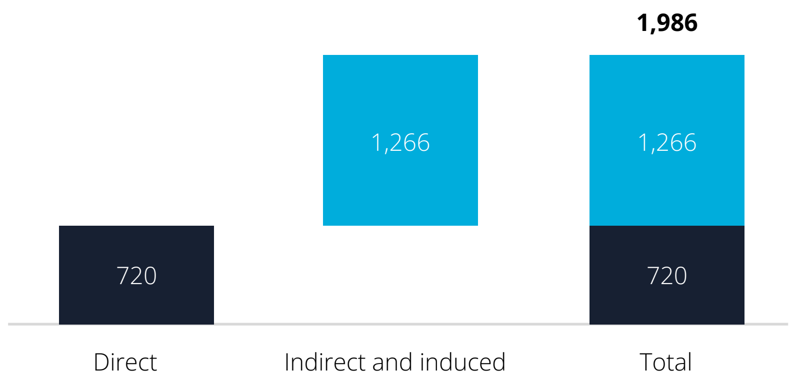


Note: Values may not sum due to rounding
Source: Oxford Economics

GDP

Total GDP supported by activity related to the cruise industry was $2.0 billion in 2024, including $0.7 billion from direct effects and an additional $1.3 billion due to indirect and induced effects.

Fig. 46. Cruise industry GDP in New York, 2024 ($ millions)

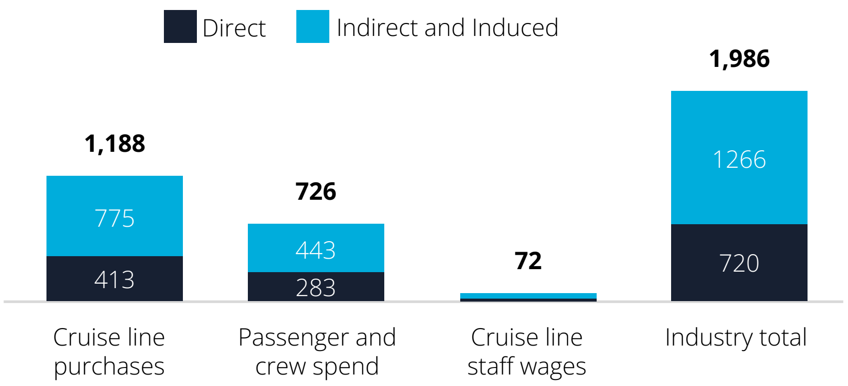


Note: Values may not sum due to rounding
Source: Oxford Economics

The cruise industry's economic impact came from three key activities: cruise line purchases, passenger and crew spending in port destinations, and wage-linked spending of cruise industry staff residing in New York.

Cruise line purchases were the largest contributor to GDP in New York, generating $1.2 billion and accounting for 60% of the industry's total GDP impact. Passenger and crew spend followed, contributing $0.7 billion, while cruise line-staff wages had the smallest impact contributing around $70 million.

Fig. 47. Composition of cruise industry GDP and impact channel in New York, 2024 ($ millions)



Note: Values may not sum due to rounding
Source: Oxford Economics

Fig. 48. Cruise industry GDP in New York versus other US states, 2024

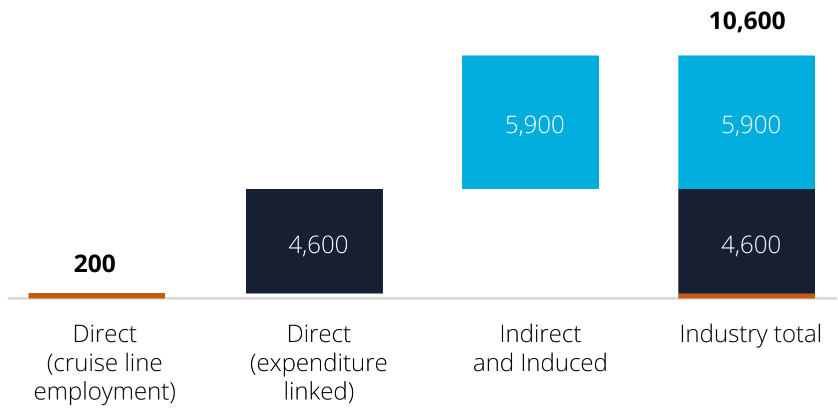
		Total GDP ($ mn)	% US Total
1	Florida	16,707	40.3%
2	California	4,433	10.7%
3	Texas	3,405	8.2%
4	**New York**	**1,986**	**4.8%**
5	Washington	1,736	4.2%
6	Alaska	1,206	2.9%
7	New Jersey	980	2.4%
8	Louisiana	768	1.9%
9	Georgia	722	1.7%
14	South Carolina	537	1.3%
21	Hawaii	314	0.8%
	Rest of United States	*8,634*	*20.8%*
	United States	**41,428**	**100.0%**

Note: Values may not sum due to rounding
Source: Oxford Economics

Employment

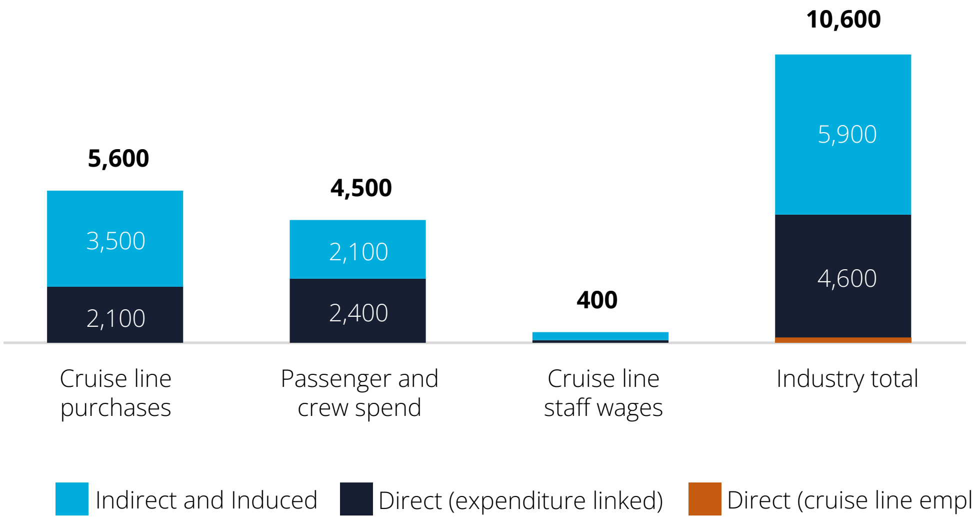
Cruise line employment, which includes both crew and head office employees, accounted for an estimated 200 jobs in New York in 2024. In addition, cruise lines also created jobs in the wider economy, with a total of 10,400 jobs created through direct, indirect, and induced impacts resulting from expenditure linked to the cruise industry. Cruise line purchases generated the largest employment impact of around 5,600 jobs, followed by passenger and crew spend at 4,500 jobs.

Fig. 49. Cruise industry employment in New York, 2024 (number of jobs)



Note: Values may not sum due to rounding
Source: Oxford Economics

Fig. 50. Composition of cruise industry employment and impact channel in New York, 2024 (number of jobs)



Note: Values may not sum due to rounding
Source: Oxford Economics

Summary of Impacts

Fig. 51. Summary of cruise industry activity and impacts in New York, 2024[9]

		New York	United States
Passenger flows (000s)	Transit visits	106	11,308
	Embark	693	17,194
	Debark	701	17,227
	Total cruise visits	**1,500**	**45,729**
Spend ($ Millions)	Passenger and crew spend	458	9,995
	Cruise line purchases	705	20,137
	Ship- and capacity-building	-	3
	Cruise line staff wages	5	2,819
	Total spend	**1,168**	**32,954**
Output ($ Millions)	Direct	1,189	31,844
	Indirect and induced	2,093	43,652
	Total output	**3,282**	**75,496**
GDP ($ Millions)	Direct	720	16,608
	Indirect and induced	1,266	24,820
	Total GDP	**1,986**	**41,428**
Employment (Jobs)	Direct (cruise line employment)	200	23,300
	Direct (expenditure linked)	4,600	151,100
	Indirect and Induced	5,900	158,300
	Total employment	**10,600**	**332,700**

Note: Values may not sum due to rounding
Source: Oxford Economics

[9] Whilst debarkations are included in the total passengers' figure, only transit and embarkations have been taken into account for economic impact calculations.

In 2024, New York's cruise industry supported **$3.3 billion** in total economic output, of which **$1.2 billion** was direct output and **$2.1 billion** was generated from indirect and induced channels.

WASHINGTON

The cruise industry supported 12,000 jobs and generated a total output impact of $2.9 billion in Washington in 2024.

In 2024, Washington recorded around 1.8 million cruise passenger visits, representing a 1% decline from 2023.

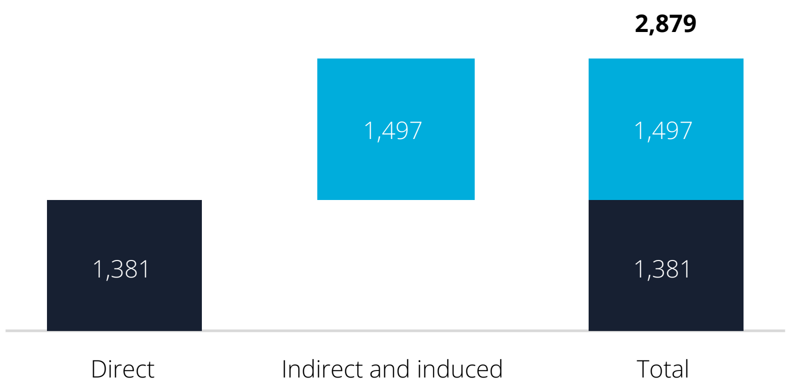
Washington State is home to the Port of Seattle, which provides itineraries to Alaska and British Columbia. Seattle attracts a relatively high share of premium passengers, with this segment accounting for 36% of passenger capacity deployed at the port in 2024, compared with 20% globally. Embarkations from Seattle represented more than 5% of total US embarkation activity in 2024.

Washington's cruise industry supported around **12,000 jobs** in 2024 and generated **$2.9 billion** in total output impacts.

Output

In Washington, cruise-related activity supported $2.9 billion worth of total output impacts in 2024. This includes $1.4 billion in direct impacts and $1.5 billion from indirect and induced effects.

Fig. 52. Cruise industry output in the Washington, 2024 ($ millions)

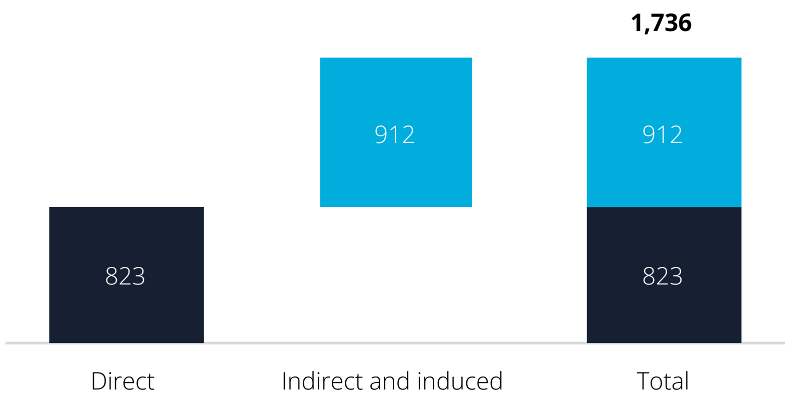


Note: Values may not sum due to rounding
Source: Oxford Economics

GDP

Total GDP supported by activity related to the cruise industry was $1.7 billion in 2024, including $0.8 billion from direct effects and an additional $0.9 billion due to indirect and induced effects.

Fig. 53. Cruise industry GDP in the Washington, 2024 ($ millions)

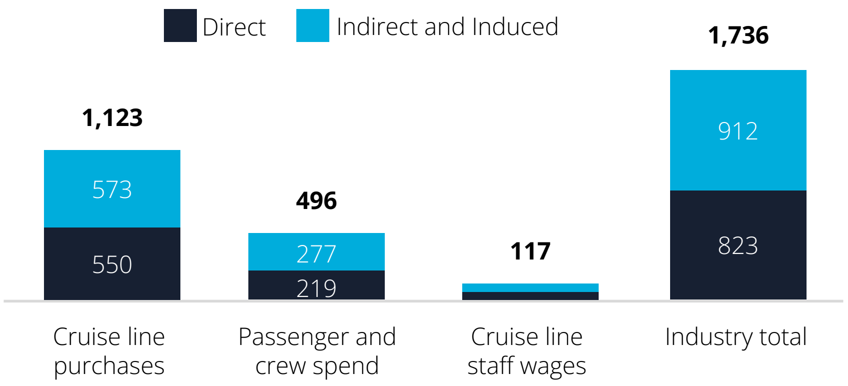


Note: Values may not sum due to rounding
Source: Oxford Economics

The cruise industry's economic impact came from three key activities: cruise line purchases, passenger and crew spending in port destinations, and wage-linked spending of cruise industry staff residing in Washington.

Cruise line purchases were the largest contributor to GDP in Washington, generating $1.1 billion and accounting for 65% of the industry's total GDP impact. Passenger and crew spend followed, contributing $0.5 billion, while cruise line-staff wages had the smallest impact contributing $0.1 billion.

Fig. 54. Composition of cruise industry GDP and impact channel in the Washington, 2024 ($ millions)



Note: Values may not sum due to rounding
Source: Oxford Economics

Fig. 55. Cruise industry GDP in the Washington versus other US states, 2024

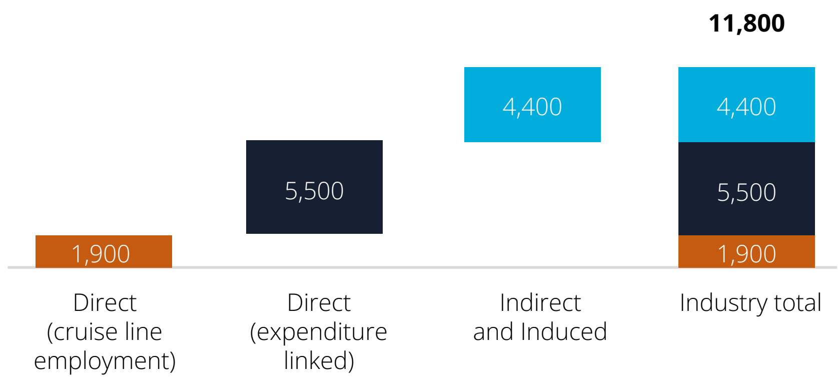
		Total GDP ($ mn)	% US Total
1	Florida	16,707	40.3%
2	California	4,433	10.7%
3	Texas	3,405	8.2%
4	New York	1,986	4.8%
5	**Washington**	**1,736**	**4.2%**
6	Alaska	1,206	2.9%
7	New Jersey	980	2.4%
8	Louisiana	768	1.9%
9	Georgia	722	1.7%
14	South Carolina	537	1.3%
21	Hawaii	314	0.8%
	Rest of United States	*8,634*	*20.8%*
	United States	**41,428**	**100.0%**

Note: Values may not sum due to rounding
Source: Oxford Economics

Employment

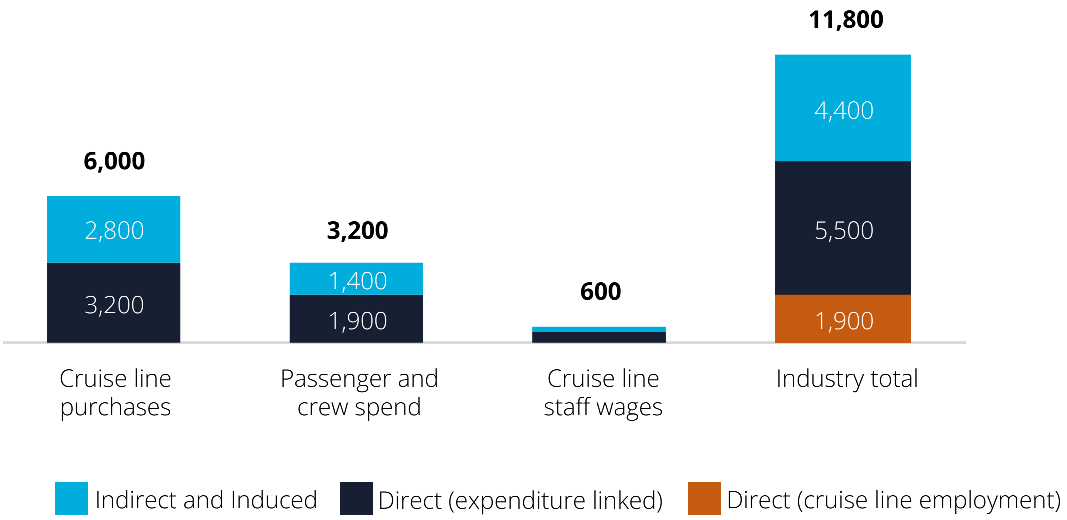
Cruise line employment, which includes both crew and head office employees, accounted for an estimated 1,900 jobs in Washington in 2024, representing 16% of the total number of jobs supported by the cruise industry in the state. A total of 9,900 jobs were created through direct, indirect, and induced impacts resulting from expenditure-linked to the cruise industry. Cruise line purchases generated the largest employment impact of around 6,000 jobs.

Fig. 56. Cruise industry employment in the Washington, 2024 (number of jobs)



Note: Values may not sum due to rounding
Source: Oxford Economics

Fig. 57. Composition of cruise industry employment and impact channel in the Washington, 2024 (number of jobs)



Note: Values may not sum due to rounding
Source: Oxford Economics

Summary of Impacts

Fig. 58. Summary of cruise industry activity and impacts in the Washington, 2024[10]

		Washington	United States
Passenger flows (000s)	Transit visits	10	11,308
	Embark	871	17,194
	Debark	871	17,227
	Total cruise visits	**1,752**	**45,729**
Spend ($ Millions)	Passenger and crew spend	358	9,995
	Cruise line purchases	921	20,137
	Ship- and capacity-building	-	3
	Cruise line staff wages	244	2,819
	Total spend	**1,523**	**32,954**
Output ($ Millions)	Direct	1,381	31,844
	Indirect and induced	1,497	43,652
	Total output	**2,879**	**75,496**
GDP ($ Millions)	Direct	823	16,608
	Indirect and induced	912	24,820
	Total GDP	**1,736**	**41,428**
Employment (Jobs)	Direct (cruise line employment)	1,900	23,300
	Direct (expenditure linked)	5,500	151,100
	Indirect and Induced	4,400	158,300
	Total employment	**11,800**	**332,700**

Note: Values may not sum due to rounding
Source: Oxford Economics

[10] Whilst debarkations are included in the total passengers' figure, only transit and embarkations have been taken into account for economic impact calculations.

In 2024, Washington's cruise industry supported **$2.9 billion** in total economic output, of which **$1.4 billion** was direct output and **$1.5 billion** was generated from indirect and induced channels.

ALASKA

The cruise industry supported 11,000 jobs and generated a total output impact of $2.1 billion in Alaska in 2024.

In 2024, Alaska recorded approximately 6.2 million cruise passenger visits, representing a 5% increase from 5.9 million in 2023.

Alaska is the leading cruise destination in the United States representing just over half of all transit passenger visits in the country in 2024. Three ports in the region, Juneau, Skagway and Ketchikan are in the 30 largest cruise ports in the world. The premium segment plays an important role, representing 52% of the deployment in the region compared to 20% globally.

Alaska's cruise industry supported **11,000 jobs** in 2024 and generated **$2.1 billion** in total output impacts.

Output

In Alaska, cruise-related activity supported $2.1 billion worth of total output impacts in 2024. This includes $1.2 billion in direct impacts and $0.9 billion from indirect and induced effects.

Fig. 59. Cruise industry output in Alaska, 2024 ($ millions)

Note: Values may not sum due to rounding
Source: Oxford Economics

GDP

Total GDP supported by activity related to the cruise industry was $1.2 billion in 2024, including $0.7 billion from direct effects and an additional $0.6 billion due to indirect and induced effects.

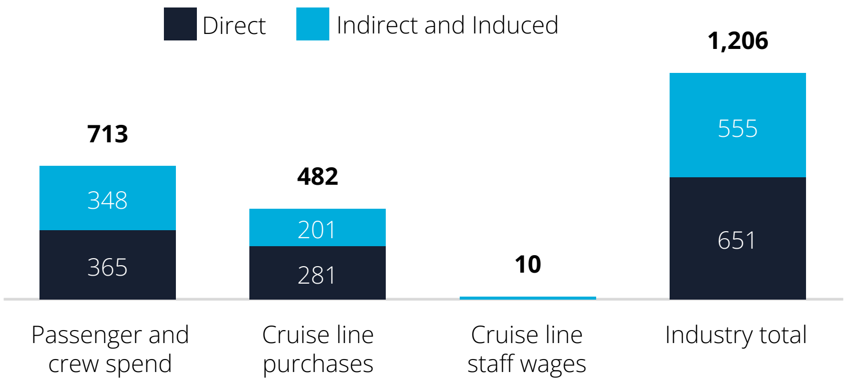
Fig. 60. Cruise industry GDP in Alaska, 2024 ($ millions)

Note: Values may not sum due to rounding
Source: Oxford Economics

The cruise industry's economic impact came from three key activities: passenger and crew spending in port destinations, cruise line purchases, and wage-linked spending of cruise industry staff residing in Alaska.

Passenger and crew spend was the largest contributor to GDP in Alaska, generating $0.7 billion and accounting for 59% of the industry's total GDP impact. Cruise line purchases followed, contributing $0.5 billion, while cruise line-staff wages had the smallest impact contributing around $10 million.

Fig. 61. Composition of cruise industry GDP and impact channel in Alaska, 2024 ($ millions)



Note: Values may not sum due to rounding
Source: Oxford Economics

Fig. 62. Cruise industry GDP in Alaska versus other US states, 2024

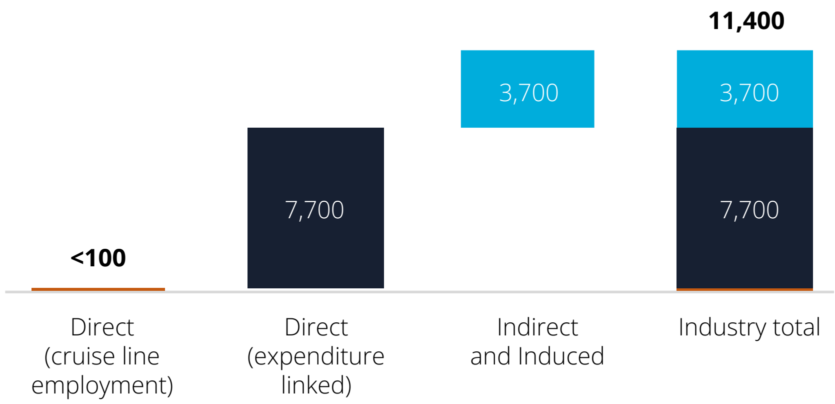
		Total GDP ($ mn)	% US Total
1	Florida	16,707	40.3%
2	California	4,433	10.7%
3	Texas	3,405	8.2%
4	New York	1,986	4.8%
5	Washington	1,736	4.2%
6	**Alaska**	**1,206**	**2.9%**
7	New Jersey	980	2.4%
8	Louisiana	768	1.9%
9	Georgia	722	1.7%
14	South Carolina	537	1.3%
21	Hawaii	314	0.8%
	Rest of United States	*8,634*	*20.8%*
	United States	**41,428**	**100.0%**

Note: Values may not sum due to rounding
Source: Oxford Economics

Employment

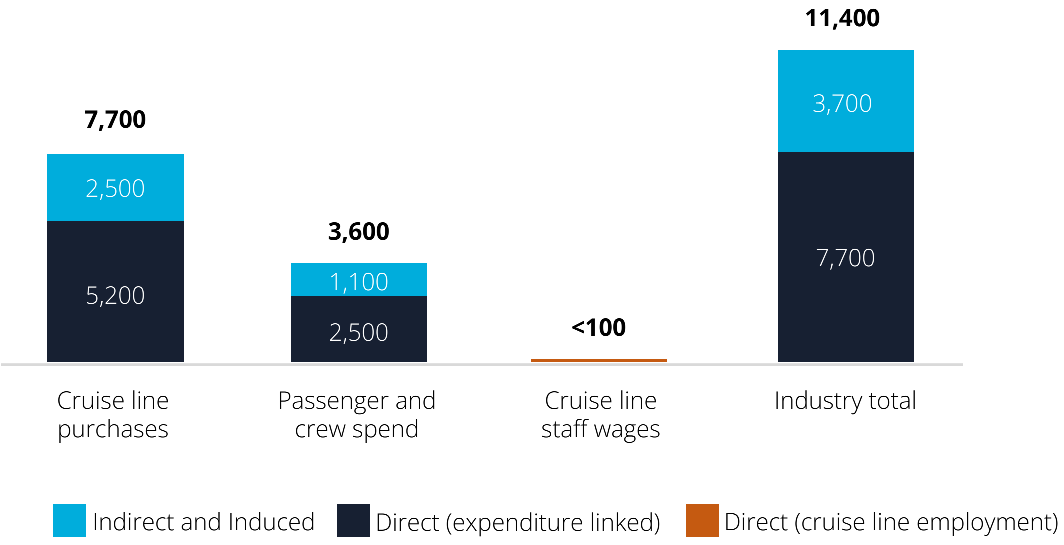
Cruise line employment, which includes both crew and head office employees, accounted for an estimated 40 jobs in Alaska in 2024. In addition, cruise lines also created jobs in the wider economy, with a total of 11,400 jobs created through direct, indirect, and induced impacts resulting from expenditure linked to the cruise industry. Passenger and crew spend generated the largest employment impact of around 7,700 jobs.

Fig. 63. Cruise industry employment in Alaska, 2024 (number of jobs)



Note: Values may not sum due to rounding
Source: Oxford Economics

Fig. 64. Composition of cruise industry employment and impact channel in Alaska, 2024 (number of jobs)



Note: Values may not sum due to rounding
Source: Oxford Economics

Summary of Impacts

Fig. 65. Summary of cruise industry activity and impacts in Alaska, 2024[11]

		Alaska	United States
Passenger flows (000s)	Transit visits	5,900	11,308
	Embark	166	17,194
	Debark	172	17,227
	Total cruise visits	**6,238**	**45,729**
Spend ($ Millions)	Passenger and crew spend	786	9,995
	Cruise line purchases	570	20,137
	Ship- and capacity-building	-	3
	Cruise line staff wages	1	2,819
	Total spend	**1,357**	**32,954**
Output ($ Millions)	Direct	1,220	31,844
	Indirect and induced	924	43,652
	Total output	**2,144**	**75,496**
GDP ($ Millions)	Direct	651	16,608
	Indirect and induced	555	24,820
	Total GDP	**1,206**	**41,428**
Employment (Jobs)	Direct (cruise line employment)	<100	23,300
	Direct (expenditure linked)	7,700	151,100
	Indirect and Induced	3,700	158,300
	Total employment	**11,400**	**332,700**

Note: Values may not sum due to rounding
Source: Oxford Economics

[11] Whilst debarkations are included in the total passengers' figure, only transit and embarkations have been taken into account for economic impact calculations.

NEW JERSEY

The cruise industry supported 6,100 jobs and generated a total output impact of $1.7 billion in New Jersey in 2024.

In 2024, New Jersey recorded around 870,000 cruise passenger visits, roughly unchanged from 2023.

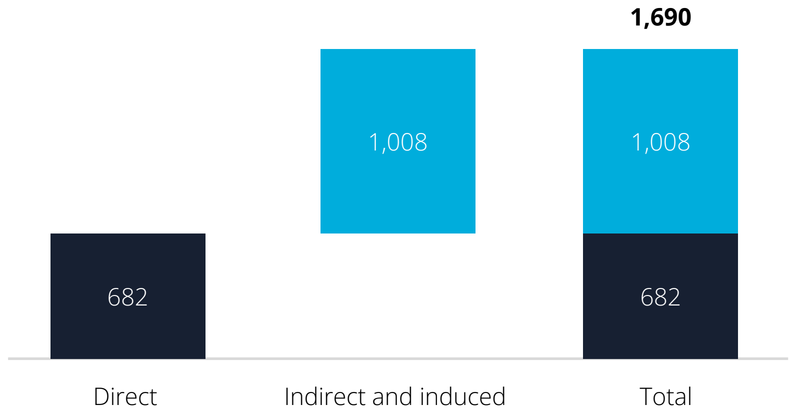
More than 420,000 New Jersey residents cruised in 2024, up from circa 400,000 in 2023, with around two-thirds of these traveling to the Caribbean. Royal Caribbean Group brands operate from the Port of Bayonne, a gateway to Bermuda and the Caribbean.

New Jersey's cruise industry supported **6,100 jobs** in 2024 and generated **$1.7 billion** in total output impacts.

Output

In New Jersey, cruise-related activity supported $1.7 billion worth of total output impacts in 2024. This includes $0.7 billion in direct impacts and $1 billion from indirect and induced effects.

Fig. 66. Cruise industry output in New Jersey, 2024 ($ millions)

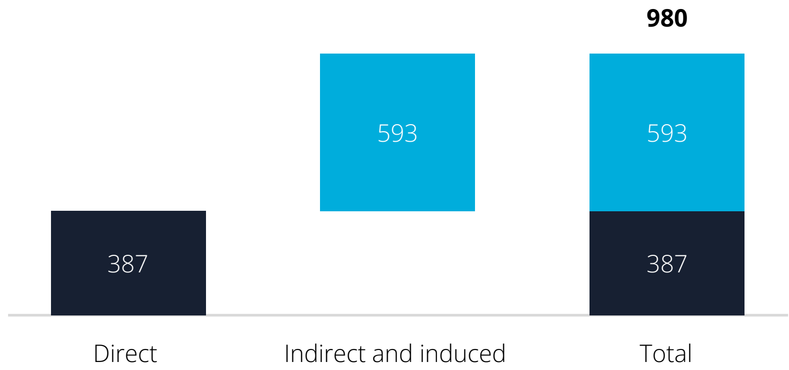


Note: Values may not sum due to rounding
Source: Oxford Economics

GDP

Total GDP supported by activity related to the cruise industry was $980 million in 2024, including $387 million from direct effects and an additional $593 million due to indirect and induced effects.

Fig. 67. Cruise industry GDP in New Jersey, 2024 ($ millions)

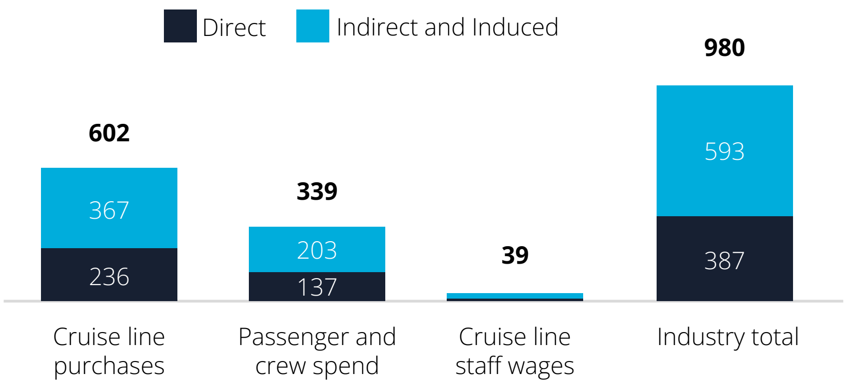


Note: Values may not sum due to rounding
Source: Oxford Economics

The cruise industry's economic impact came from three key activities: cruise line purchases, passenger and crew spending in port destinations, and wage-linked spending of cruise industry staff residing in New Jersey.

Cruise line purchases were the largest contributor to GDP in New Jersey, generating $602 million and accounting for 61% of the industry's total GDP impact. Passenger and crew spend followed, contributing $339 million, while cruise line-staff wages had the smallest impact contributing around $40 million.

Fig. 68. Composition of cruise industry GDP and impact channel in New Jersey, 2024 ($ millions)



Note: Values may not sum due to rounding
Source: Oxford Economics

Fig. 69. Cruise industry GDP in New Jersey versus other US states, 2024

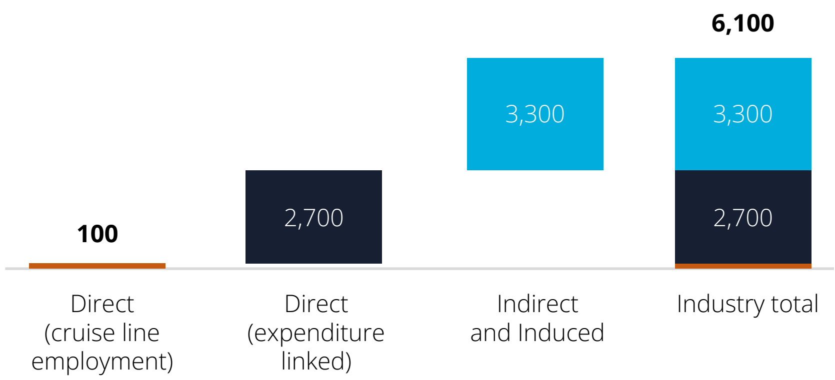
		Total GDP ($ mn)	% US Total
1	Florida	16,707	40.3%
2	California	4,433	10.7%
3	Texas	3,405	8.2%
4	New York	1,986	4.8%
5	Washington	1,736	4.2%
6	Alaska	1,206	2.9%
7	**New Jersey**	**980**	**2.4%**
8	Louisiana	768	1.9%
9	Georgia	722	1.7%
14	South Carolina	537	1.3%
21	Hawaii	314	0.8%
	Rest of United States	*8,634*	*20.8%*
	United States	**41,428**	**100.0%**

Note: Values may not sum due to rounding
Source: Oxford Economics

Employment

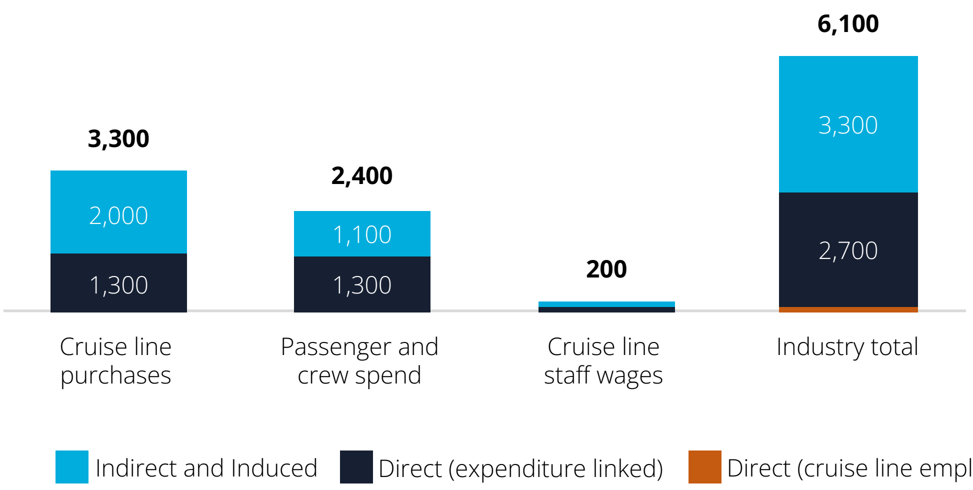
Cruise line employment, which includes both crew and head office employees, accounted for an estimated 100 jobs in New Jersey in 2024. In addition, cruise lines also created jobs in the wider economy, with a total of 6,000 jobs created through direct, indirect, and induced impacts resulting from expenditure linked to the cruise industry. Cruise line purchases generated the largest employment impact of around 3,300 jobs, followed by passenger and crew spend at 2,400 jobs.

Fig. 70. Cruise industry employment in New Jersey, 2024 (number of jobs)



Note: Values may not sum due to rounding
Source: Oxford Economics

Fig. 71. Composition of cruise industry employment and impact channel in New Jersey, 2024 (number of jobs)



Note: Values may not sum due to rounding
Source: Oxford Economics

Summary of Impacts

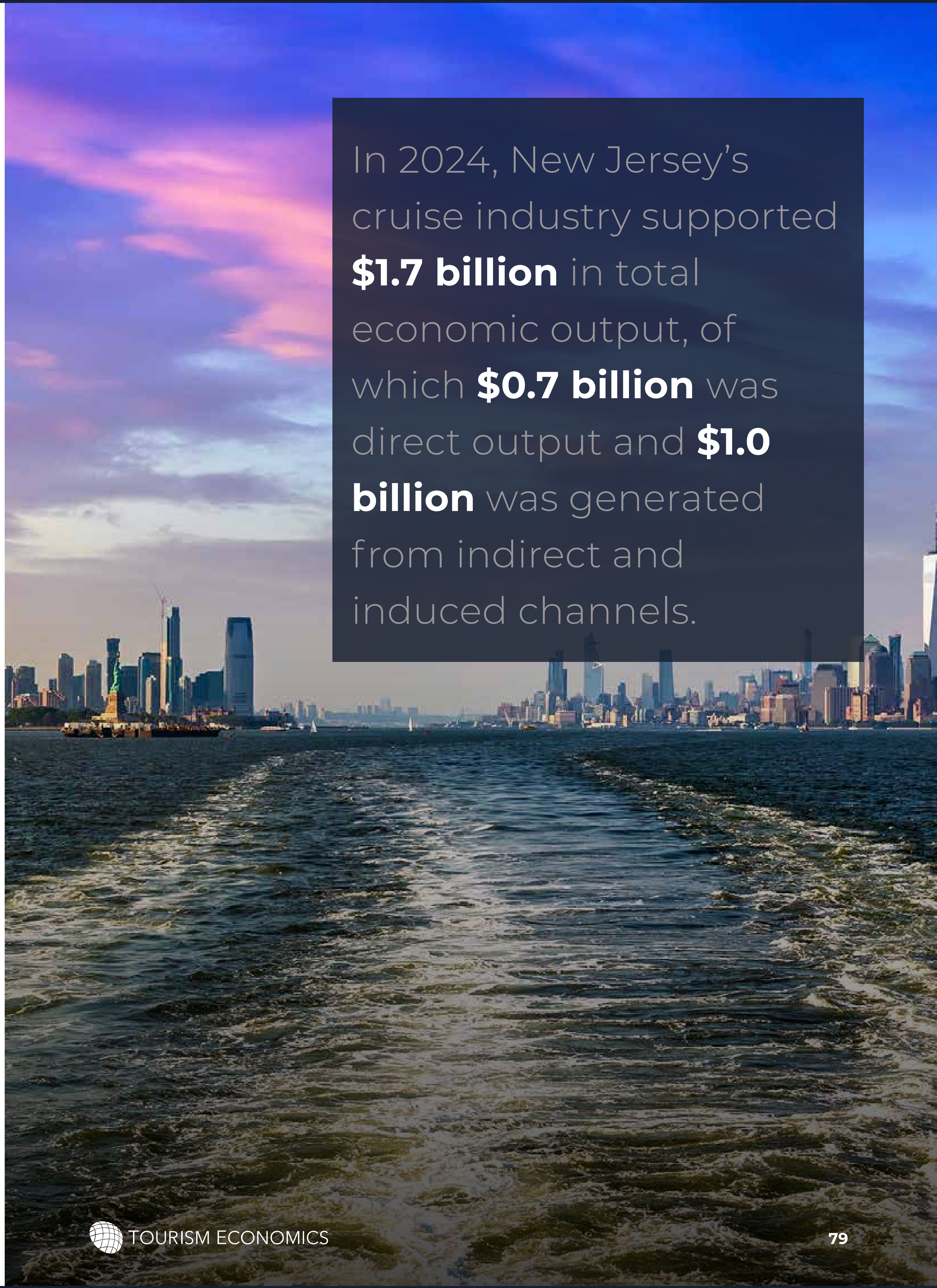
Fig. 72. Summary of cruise industry activity and impacts in New Jersey, 2024[12]

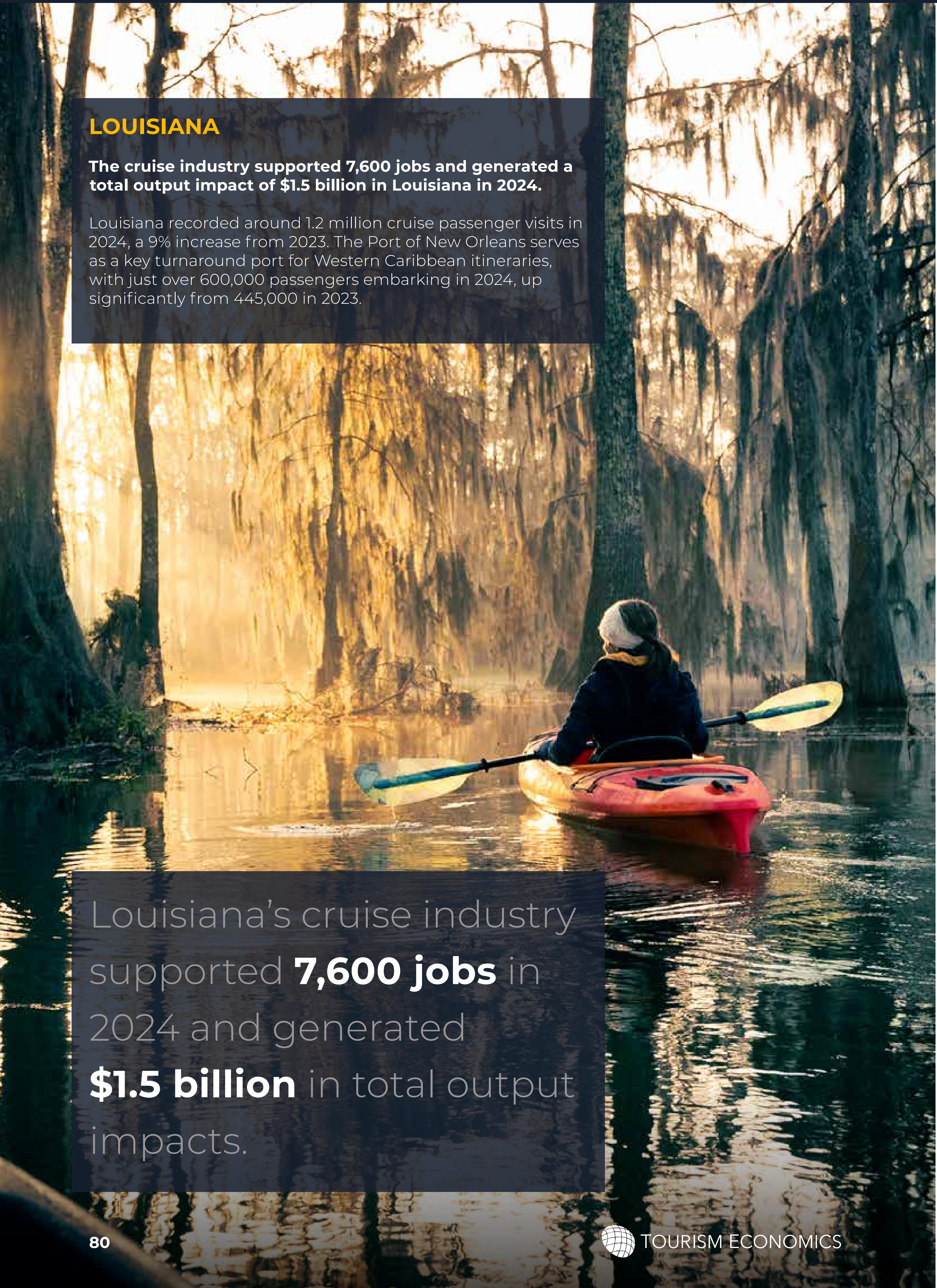
		New Jersey	United States
Passenger flows (000s)	Transit visits	17	11,308
	Embark	427	17,194
	Debark	427	17,227
	Total cruise visits	**871**	**45,729**
Spend ($ Millions)	Passenger and crew spend	227	9,995
	Cruise line purchases	417	20,137
	Ship- and capacity-building	-	3
	Cruise line staff wages	3	2,819
	Total spend	**647**	**32,954**
Output ($ Millions)	Direct	682	31,844
	Indirect and induced	1,008	43,652
	Total output	**1,690**	**75,496**
GDP ($ Millions)	Direct	387	16,608
	Indirect and induced	593	24,820
	Total GDP	**980**	**41,428**
Employment (Jobs)	Direct (cruise line employment)	100	23,300
	Direct (expenditure linked)	2,700	151,100
	Indirect and Induced	3,300	158,300
	Total employment	**6,100**	**332,700**

Note: Values may not sum due to rounding
Source: Oxford Economics

[12] Whilst debarkations are included in the total passengers' figure, only transit and embarkations have been taken into account for economic impact calculations.

In 2024, New Jersey's cruise industry supported **$1.7 billion** in total economic output, of which **$0.7 billion** was direct output and **$1.0 billion** was generated from indirect and induced channels.





LOUISIANA

The cruise industry supported 7,600 jobs and generated a total output impact of $1.5 billion in Louisiana in 2024.

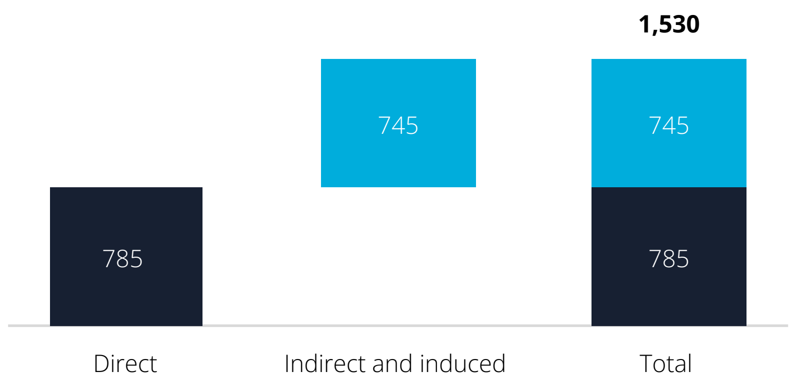
Louisiana recorded around 1.2 million cruise passenger visits in 2024, a 9% increase from 2023. The Port of New Orleans serves as a key turnaround port for Western Caribbean itineraries, with just over 600,000 passengers embarking in 2024, up significantly from 445,000 in 2023.

Louisiana's cruise industry supported **7,600 jobs** in 2024 and generated **$1.5 billion** in total output impacts.

Output

In Louisiana, cruise-related activity supported $1.5 billion worth of total output impacts in 2024. This includes $0.8 billion in direct impacts and $0.7 billion from indirect and induced effects.

Fig. 73. Cruise industry output in Louisiana, 2024 ($ millions)

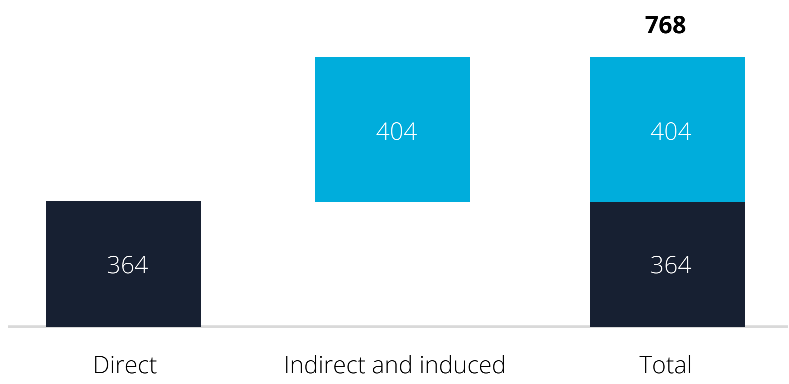


Note: Values may not sum due to rounding
Source: Oxford Economics

GDP

Total GDP supported by activity related to the cruise industry was $768 million in 2024, including $364 million from direct effects and an additional $404 million due to indirect and induced effects.

Fig. 74. Cruise industry GDP in Louisiana, 2024 ($ millions)

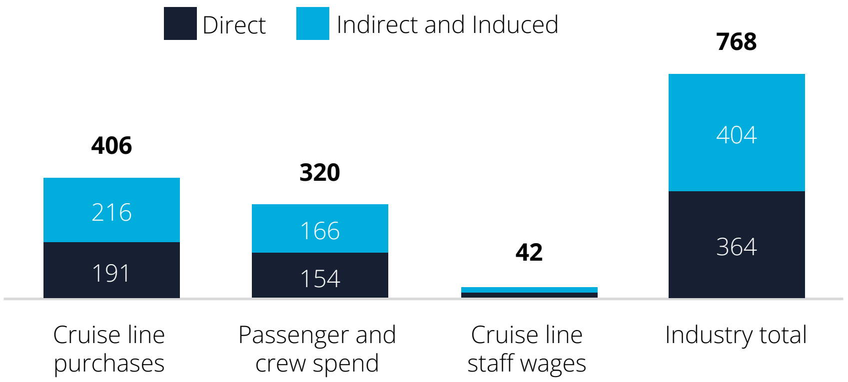


Note: Values may not sum due to rounding
Source: Oxford Economics

The cruise industry's economic impact came from three key activities: cruise line purchases, passenger and crew spending in port destinations, and wage-linked spending of cruise industry staff residing in Louisiana.

Cruise line purchases were the largest contributor to GDP in Louisiana, generating $406 million and accounting for 53% of the industry's total GDP impact. Passenger and crew spend followed, contributing $320 million, while cruise line-staff wages had the smallest impact contributing over $40 million.

Fig. 75. Composition of cruise industry GDP and impact channel in Louisiana, 2024 ($ millions)



Note: Values may not sum due to rounding
Source: Oxford Economics

Fig. 76. Cruise industry GDP in Louisiana versus other US states, 2024

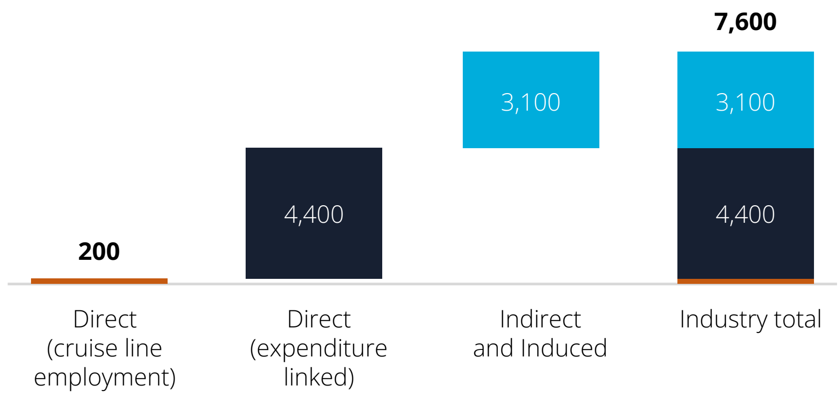
		Total GDP ($ mn)	% US Total
1	Florida	16,707	40.3%
2	California	4,433	10.7%
3	Texas	3,405	8.2%
4	New York	1,986	4.8%
5	Washington	1,736	4.2%
6	Alaska	1,206	2.9%
7	New Jersey	980	2.4%
8	**Louisiana**	**768**	**1.9%**
9	Georgia	722	1.7%
14	South Carolina	537	1.3%
21	Hawaii	314	0.8%
	Rest of United States	*8,634*	*20.8%*
	United States	**41,428**	**100.0%**

Note: Values may not sum due to rounding
Source: Oxford Economics

Employment

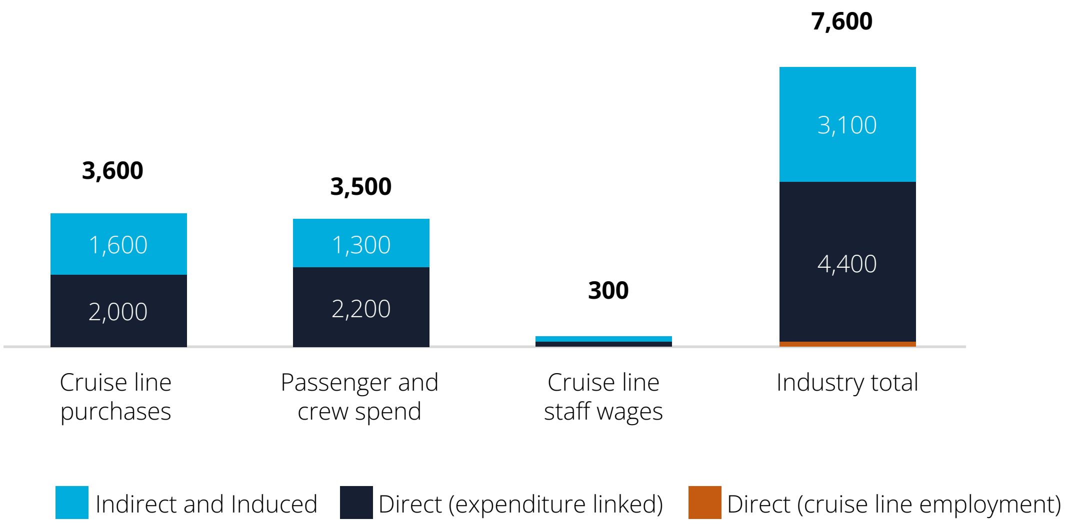
Cruise line employment, which includes both crew and head office employees, accounted for an estimated 200 jobs in Louisiana in 2024. In addition, cruise lines also created jobs in the wider economy, with a total of 7,400 jobs created through direct, indirect, and induced impacts resulting from expenditure linked to the cruise industry. Cruise line purchases generated the largest employment impact of around 3,600 jobs, followed by passenger and crew spend at 3,500 jobs.

Fig. 77. Cruise industry employment in Louisiana, 2024 (number of jobs)



Note: Values may not sum due to rounding
Source: Oxford Economics

Fig. 78. Composition of cruise industry employment and impact channel in Louisiana, 2024 (number of jobs)



Note: Values may not sum due to rounding
Source: Oxford Economics

Summary of Impacts

Fig. 79. Summary of cruise industry activity and impacts in Louisiana, 2024[13]

		Louisiana	United States
Passenger flows (000s)	Transit visits	30	11,308
	Embark	604	17,194
	Debark	604	17,227
	Total cruise visits	**1,238**	**45,729**
Spend ($ Millions)	Passenger and crew spend	290	9,995
	Cruise line purchases	439	20,137
	Ship- and capacity-building	-	3
	Cruise line staff wages	4	2,819
	Total spend	**733**	**32,954**
Output ($ Millions)	Direct	785	31,844
	Indirect and induced	745	43,652
	Total output	**1,530**	**75,496**
GDP ($ Millions)	Direct	364	16,608
	Indirect and induced	404	24,820
	Total GDP	**768**	**41,428**
Employment (Jobs)	Direct (cruise line employment)	200	23,300
	Direct (expenditure linked)	4,400	151,100
	Indirect and Induced	3,100	158,300
	Total employment	**7,600**	**332,700**

Note: Values may not sum due to rounding
Source: Oxford Economics

[13] Whilst debarkations are included in the total passengers' figure, only transit and embarkations have been taken into account for economic impact calculations.

In 2024, Louisiana's cruise industry supported **$1.5 billion** in total economic output, of which **$0.8 billion** was direct output and **$0.7 billion** was generated from indirect and induced channels.

GEORGIA

The cruise industry supported 4,300 jobs and generated a total output impact of $1.4 billion in Georgia in 2024.

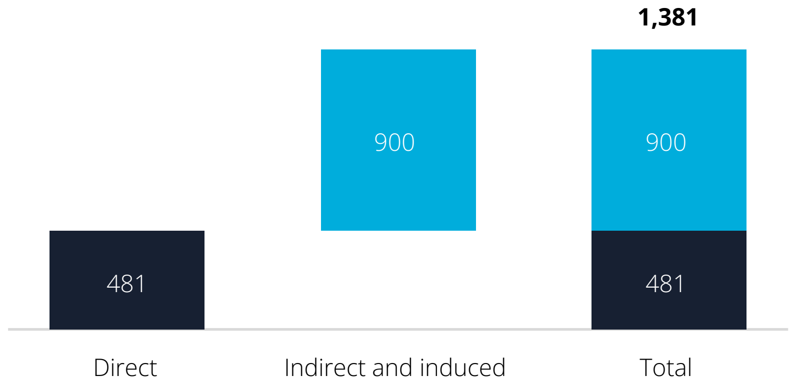
Around 730,000 Georgia residents went on a cruise in 2024, up from approximately 680,000 in 2023. The vast majority traveled to the Caribbean, benefiting from convenient access to multiple embarkation ports in nearby states.

Georgia's cruise industry supported **4,300 jobs** in 2024 and generated **$1.4 billion** in total output impacts.

Output

In Georgia, cruise-related activity supported $1.4 billion worth of total output impacts in 2024. This includes $0.5 billion in direct impacts and $0.9 billion from indirect and induced effects.

Fig. 80. Cruise industry output in Georgia, 2024 ($ millions)

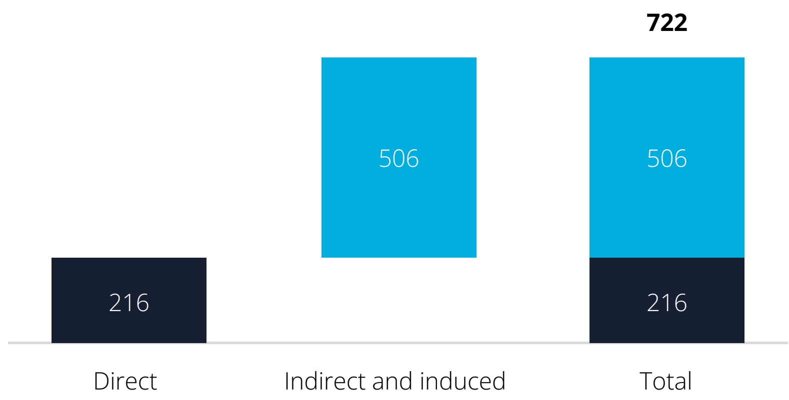


Note: Values may not sum due to rounding
Source: Oxford Economics

GDP

Total GDP supported by activity related to the cruise industry was $722 million in 2024, including $216 million from direct effects and an additional $506 million due to indirect and induced effects.

Fig. 81. Cruise industry GDP in Georgia, 2024 ($ millions)

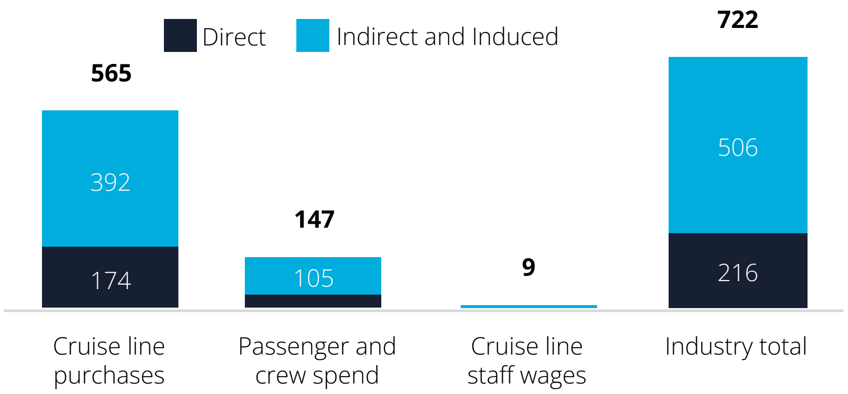


Note: Values may not sum due to rounding
Source: Oxford Economics

The cruise industry's economic impact came from three key activities: cruise line purchases, passenger and crew spending in port destinations, and wage-linked spending of cruise industry staff residing in Georgia.

Cruise line purchases were the largest contributor to GDP in Georgia, generating $565 million and accounting for 78% of the industry's total GDP impact. Passenger and crew spend followed, contributing $147 million, while cruise line-staff wages had the smallest impact contributing nearly $10 million.

Fig. 82. Composition of cruise industry GDP and impact channel in Georgia, 2024 ($ millions)



Note: Values may not sum due to rounding
Source: Oxford Economics

Fig. 83. Cruise industry GDP in Georgia versus other US states, 2024

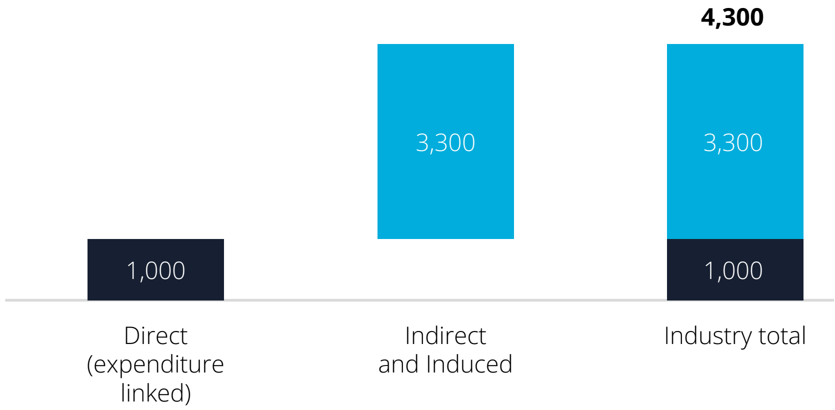
		Total GDP ($ mn)	% US Total
1	Florida	16,707	40.3%
2	California	4,433	10.7%
3	Texas	3,405	8.2%
4	New York	1,986	4.8%
5	Washington	1,736	4.2%
6	Alaska	1,206	2.9%
7	New Jersey	980	2.4%
8	Louisiana	768	1.9%
9	**Georgia**	**722**	**1.7%**
14	South Carolina	537	1.3%
21	Hawaii	314	0.8%
	Rest of United States	*8,634*	*20.8%*
	United States	**41,428**	**100.0%**

Note: Values may not sum due to rounding
Source: Oxford Economics

Employment

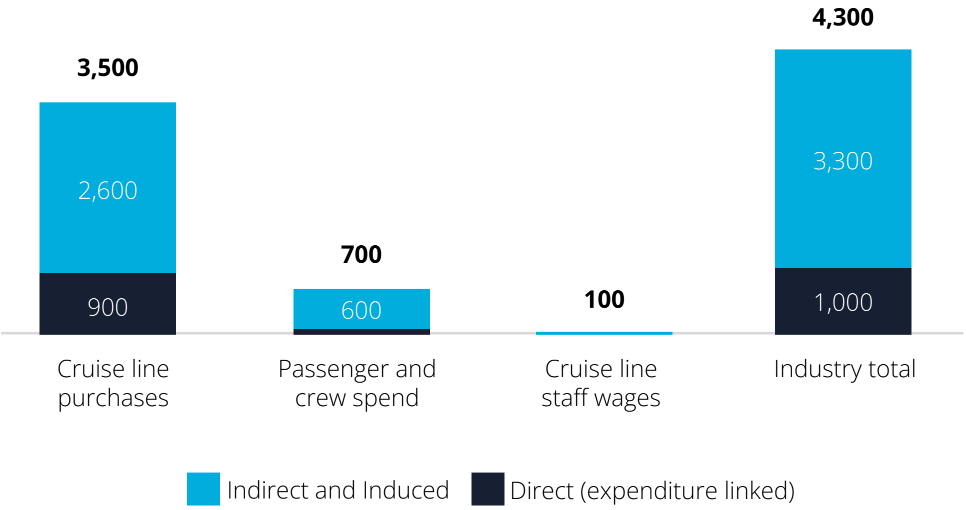
Cruise line employment, including both crew and head office staff, had a negligible impact in Georgia in 2024. However, cruise lines created jobs in the wider economy, with a total of 4,300 created through direct, indirect, and induced impacts resulting from expenditure linked to the cruise industry. Cruise line purchases generated the largest employment impact of around 3,500 jobs.

Fig. 84. Cruise industry employment in Georgia, 2024 (number of jobs)



Note: Values may not sum due to rounding
Source: Oxford Economics

Fig. 85. Composition of cruise industry employment and impact channel in Georgia, 2024 (number of jobs)



Note: Values may not sum due to rounding
Source: Oxford Economics

Summary of Impacts

Fig. 86. Summary of cruise industry activity and impacts in Georgia, 2024[14]

		Georgia	United States
Passenger flows (000s)	Transit visits	-	11,308
	Embark	-	17,194
	Debark	-	17,227
	Total cruise visits	-	**45,729**
Spend ($ Millions)	Passenger and crew spend	73	9,995
	Cruise line purchases	346	20,137
	Ship- and capacity-building	-	3
	Cruise line staff wages	-	2,819
	Total spend	**419**	**32,954**
Output ($ Millions)	Direct	481	31,844
	Indirect and induced	900	43,652
	Total output	**1,381**	**75,496**
GDP ($ Millions)	Direct	216	16,608
	Indirect and induced	506	24,820
	Total GDP	**722**	**41,428**
Employment (Jobs)	Direct (cruise line employment)	-	23,300
	Direct (expenditure linked)	1,000	151,100
	Indirect and Induced	3,300	158,300
	Total employment	**4,300**	**332,700**

Note: Values may not sum due to rounding
Source: Oxford Economics

[14] Whilst debarkations are included in the total passengers' figure, only transit and embarkations have been taken into account for economic impact calculations.

SOUTH CAROLINA

The cruise industry supported 4,700 jobs and generated a total output impact of $1.1 billion in South Carolina in 2024.

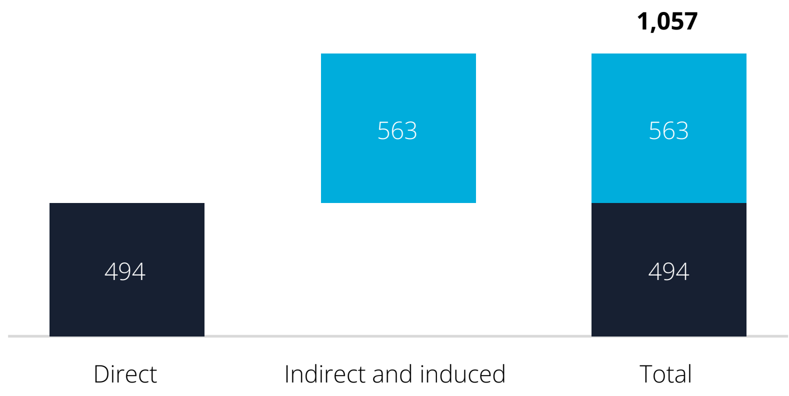
In 2024, South Carolina recorded around 600,000 cruise passenger visits. Nearly 282,000 South Carolina residents went on a cruise in 2024, with the majority (86%) choosing Caribbean itineraries. Charleston serves as the state's primary cruise port. However, cruise activity in 2025 is expected to decline as several major cruise lines scale back their presence in the region.

South Carolina's cruise industry supported **4,700 jobs** in 2024 and generated **$1.1 billion** in total output impacts.

Output

In South Carolina, cruise-related activity supported $1.1 billion worth of total output impacts in 2024. This includes $0.5 billion in direct impacts and $0.6 billion from indirect and induced effects.

Fig. 87. Cruise industry output in South Carolina, 2024 ($ millions)

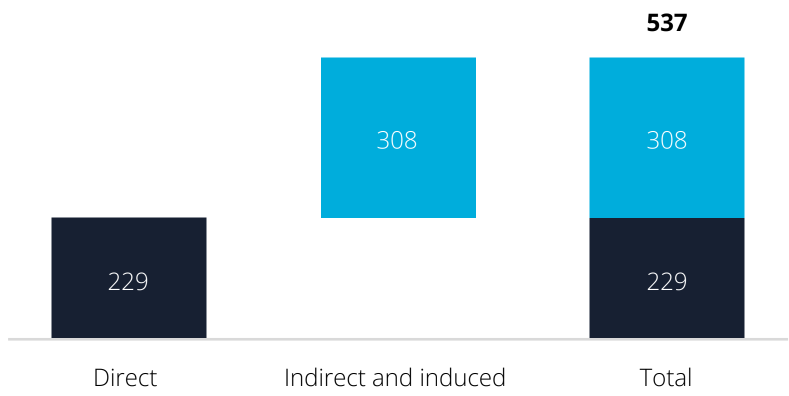


Note: Values may not sum due to rounding
Source: Oxford Economics

GDP

Total GDP supported by activity related to the cruise industry was $537 million in 2024, including $229 million from direct effects and an additional $308 million due to indirect and induced effects.

Fig. 88. Cruise industry GDP in South Carolina, 2024 ($ millions)

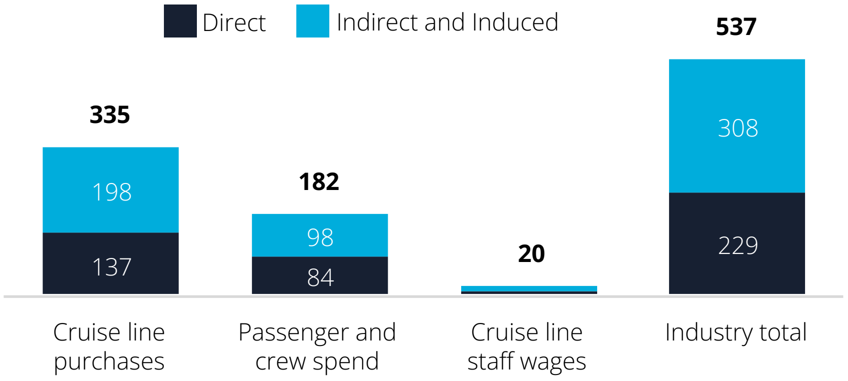


Note: Values may not sum due to rounding
Source: Oxford Economics

The cruise industry's economic impact came from three key activities: cruise line purchases, passenger and crew spending in port destinations, and wage-linked spending of cruise industry staff residing in South Carolina.

Cruise line purchases were the largest contributor to GDP in South Carolina, generating $335 million and accounting for 62% of the industry's total GDP impact. Passenger and crew spend followed, contributing $182 million, while cruise line-staff wages had the smallest impact contributing around $20 million.

Fig. 89. Composition of cruise industry GDP and impact channel in South Carolina, 2024 ($ millions)



Note: Values may not sum due to rounding
Source: Oxford Economics

Fig. 90. Cruise industry GDP in South Carolina versus other US states, 2024

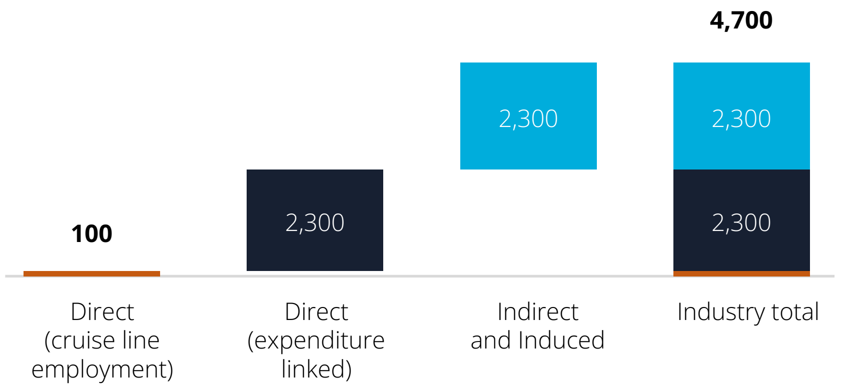
		Total GDP ($ mn)	% US Total
1	Florida	16,707	40.3%
2	California	4,433	10.7%
3	Texas	3,405	8.2%
4	New York	1,986	4.8%
5	Washington	1,736	4.2%
6	Alaska	1,206	2.9%
7	New Jersey	980	2.4%
8	Louisiana	768	1.9%
9	Georgia	722	1.7%
14	**South Carolina**	**537**	**1.3%**
21	Hawaii	314	0.8%
	Rest of United States	*8,634*	*20.8%*
	United States	**41,428**	**100.0%**

Note: Values may not sum due to rounding
Source: Oxford Economics

Employment

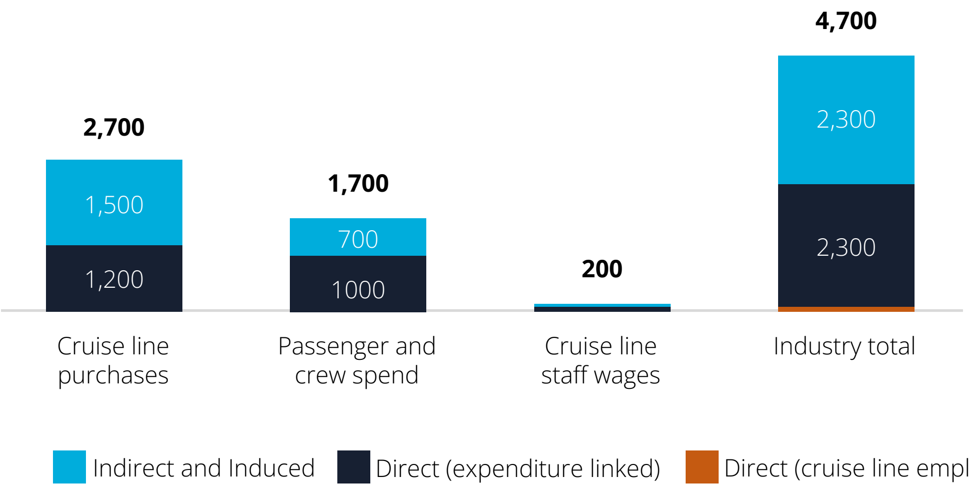
Cruise line employment, which includes both crew and head office employees, accounted for an estimated 70 jobs in South Carolina in 2024. In addition, cruise lines also created jobs in the wider economy, with a total of 4,600 jobs created through direct, indirect, and induced impacts resulting from expenditure linked to the cruise industry. Cruise line purchases generated the largest employment impact of around 2,700 jobs, followed by passenger and crew spend at 1,700 jobs.

Fig. 91. Cruise industry employment in South Carolina, 2024 (number of jobs)



Note: Values may not sum due to rounding
Source: Oxford Economics

Fig. 92. Composition of cruise industry employment and impact channel in South Carolina, 2024 (number of jobs)



Note: Values may not sum due to rounding
Source: Oxford Economics

Summary of Impacts

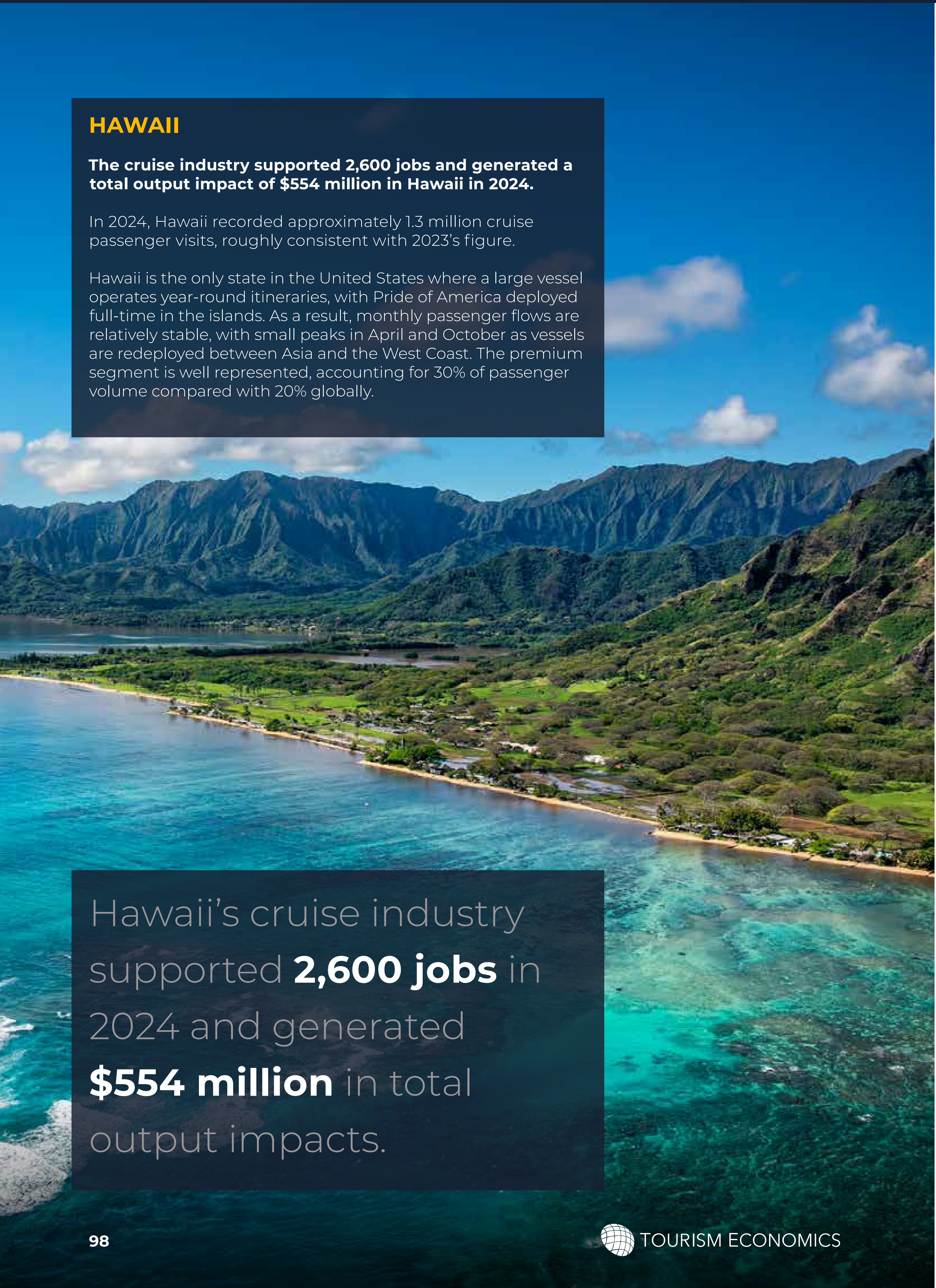
Fig. 93. Summary of cruise industry activity and impacts in South Carolina, 2024[15]

		South Carolina	United States
Passenger flows (000s)	Transit visits	43	11,308
	Embark	256	17,194
	Debark	256	17,227
	Total cruise visits	**555**	**45,729**
Spend ($ Millions)	Passenger and crew spend	153	9,995
	Cruise line purchases	317	20,137
	Ship- and capacity-building	-	3
	Cruise line staff wages	2	2,819
	Total spend	**472**	**32,954**
Output ($ Millions)	Direct	494	31,844
	Indirect and induced	563	43,652
	Total output	**1,057**	**75,496**
GDP ($ Millions)	Direct	229	16,608
	Indirect and induced	308	24,820
	Total GDP	**537**	**41,428**
Employment (Jobs)	Direct (cruise line employment)	100	23,300
	Direct (expenditure linked)	2,300	151,100
	Indirect and Induced	2,300	158,300
	Total employment	**4,700**	**332,700**

Note: Values may not sum due to rounding
Source: Oxford Economics

[15] Whilst debarkations are included in the total passengers' figure, only transit and embarkations have been taken into account for economic impact calculations.

In 2024, South Carolina's cruise industry supported close to **$1.1 billion** in total economic output, of which **$0.5 billion** was direct output and **$0.6 billion** was generated from indirect and induced channels.



HAWAII

The cruise industry supported 2,600 jobs and generated a total output impact of $554 million in Hawaii in 2024.

In 2024, Hawaii recorded approximately 1.3 million cruise passenger visits, roughly consistent with 2023's figure.

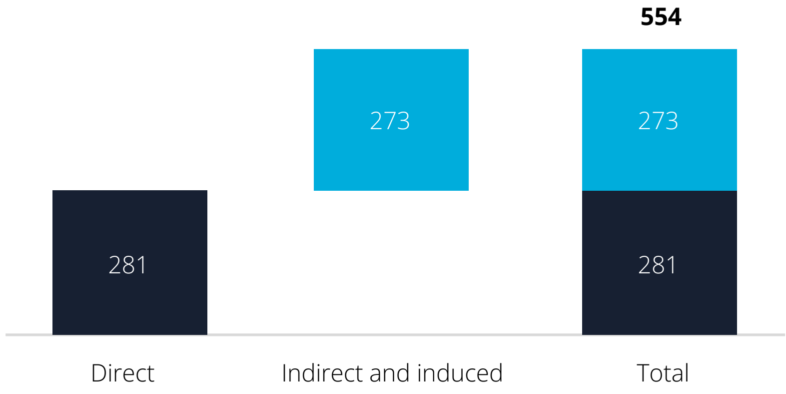
Hawaii is the only state in the United States where a large vessel operates year-round itineraries, with Pride of America deployed full-time in the islands. As a result, monthly passenger flows are relatively stable, with small peaks in April and October as vessels are redeployed between Asia and the West Coast. The premium segment is well represented, accounting for 30% of passenger volume compared with 20% globally.

Hawaii's cruise industry supported **2,600 jobs** in 2024 and generated **$554 million** in total output impacts.

Output

In Hawaii, cruise-related activity supported $554 million worth of total output impacts in 2024. This includes $281 million in direct impacts and $273 million from indirect and induced effects.

Fig. 94. Cruise industry output in Hawaii, 2024 ($ millions)

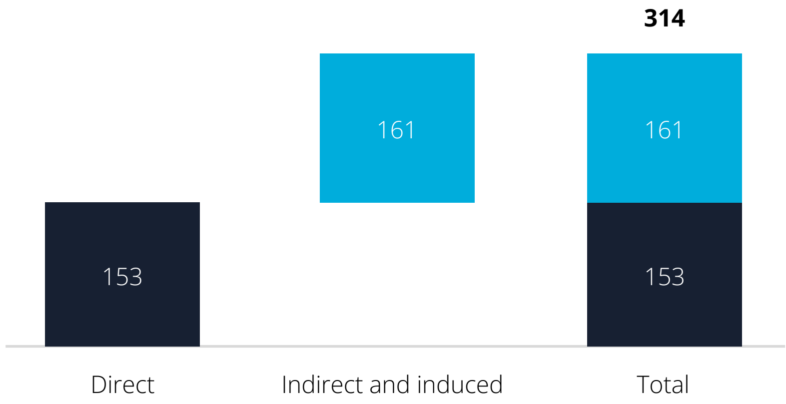


Note: Values may not sum due to rounding
Source: Oxford Economics

GDP

Total GDP supported by activity related to the cruise industry was $314 million in 2024, including $153 million from direct effects and an additional $161 million due to indirect and induced effects.

Fig. 95. Cruise industry GDP in Hawaii, 2024 ($ millions)

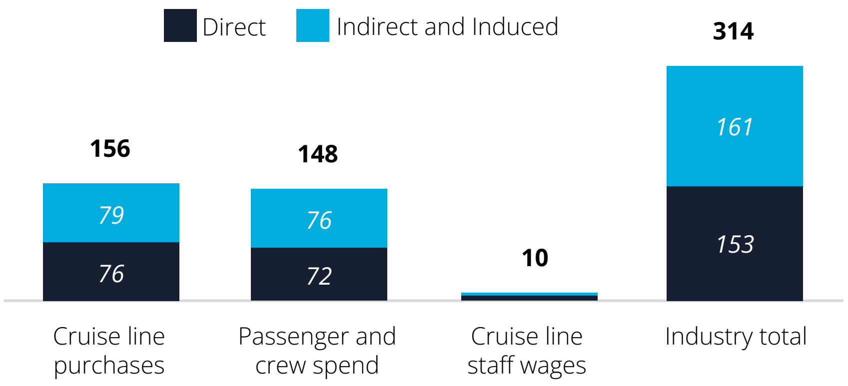


Note: Values may not sum due to rounding
Source: Oxford Economics

The cruise industry's economic impact came from three key activities: cruise line purchases, passenger and crew spending in port destinations, and wage-linked spending of cruise industry staff residing in Hawaii.

Cruise line purchases were the largest contributor to GDP in Hawaii, generating $156 million and accounting for 50% of the industry's total GDP impact. Passenger and crew spend closely followed, contributing $148 million, while cruise line-staff wages had the smallest impact contributing $10 million.

Fig. 96. Composition of cruise industry GDP and impact channel in Hawaii, 2024 ($ millions)



Note: Values may not sum due to rounding
Source: Oxford Economics

Fig. 97. Cruise industry GDP in Hawaii versus other US states, 2024

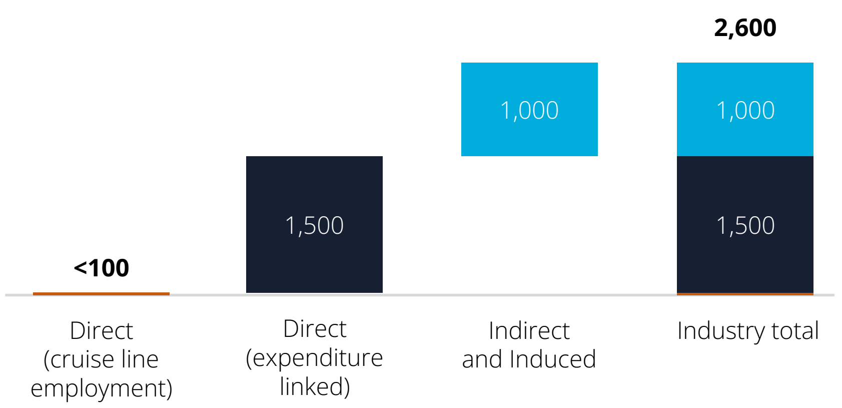
		Total GDP ($ mn)	% US Total
1	Florida	16,707	40.3%
2	California	4,433	10.7%
3	Texas	3,405	8.2%
4	New York	1,986	4.8%
5	Washington	1,736	4.2%
6	Alaska	1,206	2.9%
7	New Jersey	980	2.4%
8	Louisiana	768	1.9%
9	Georgia	722	1.7%
14	South Carolina	537	1.3%
21	**Hawaii**	**314**	**0.8%**
	Rest of United States	*8,634*	*20.8%*
	United States	**41,428**	**100.0%**

Note: Values may not sum due to rounding
Source: Oxford Economics

Employment

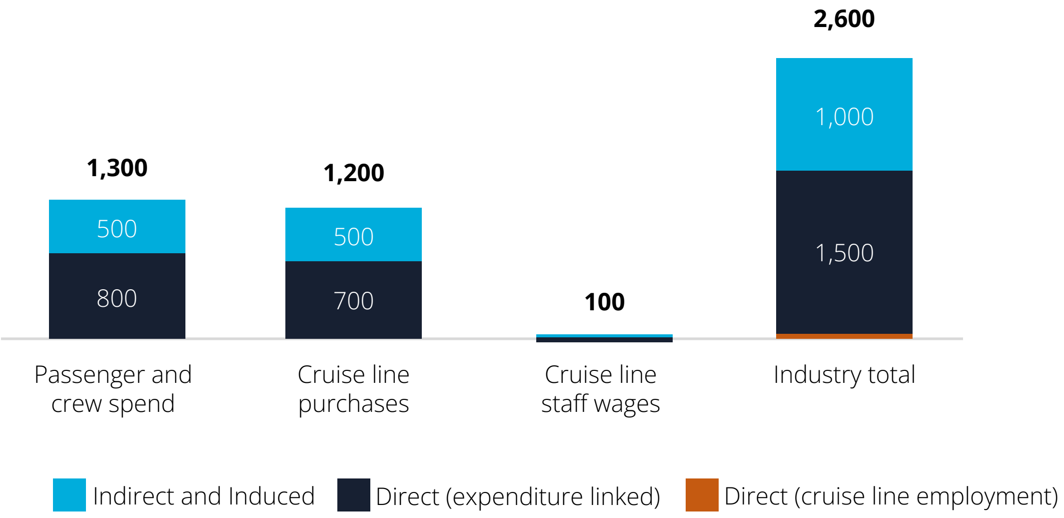
Cruise line employment, which includes both crew and head office employees, accounted for an estimated 40 jobs in Hawaii in 2024. In addition, cruise lines also created jobs in the wider economy, with a total of 2,500 jobs created through direct, indirect, and induced impacts resulting from expenditure linked to the cruise industry. Passenger and crew spend generated the largest employment impact of around 1,300 jobs, closely followed by cruise line purchases at 1,200 jobs.

Fig. 98. Cruise industry employment in Hawaii, 2024 (number of jobs)



Note: Values may not sum due to rounding
Source: Oxford Economics

Fig. 99. Composition of cruise industry employment and impact channel in Hawaii, 2024 (number of jobs)



Note: Values may not sum due to rounding
Source: Oxford Economics

Summary of Impacts

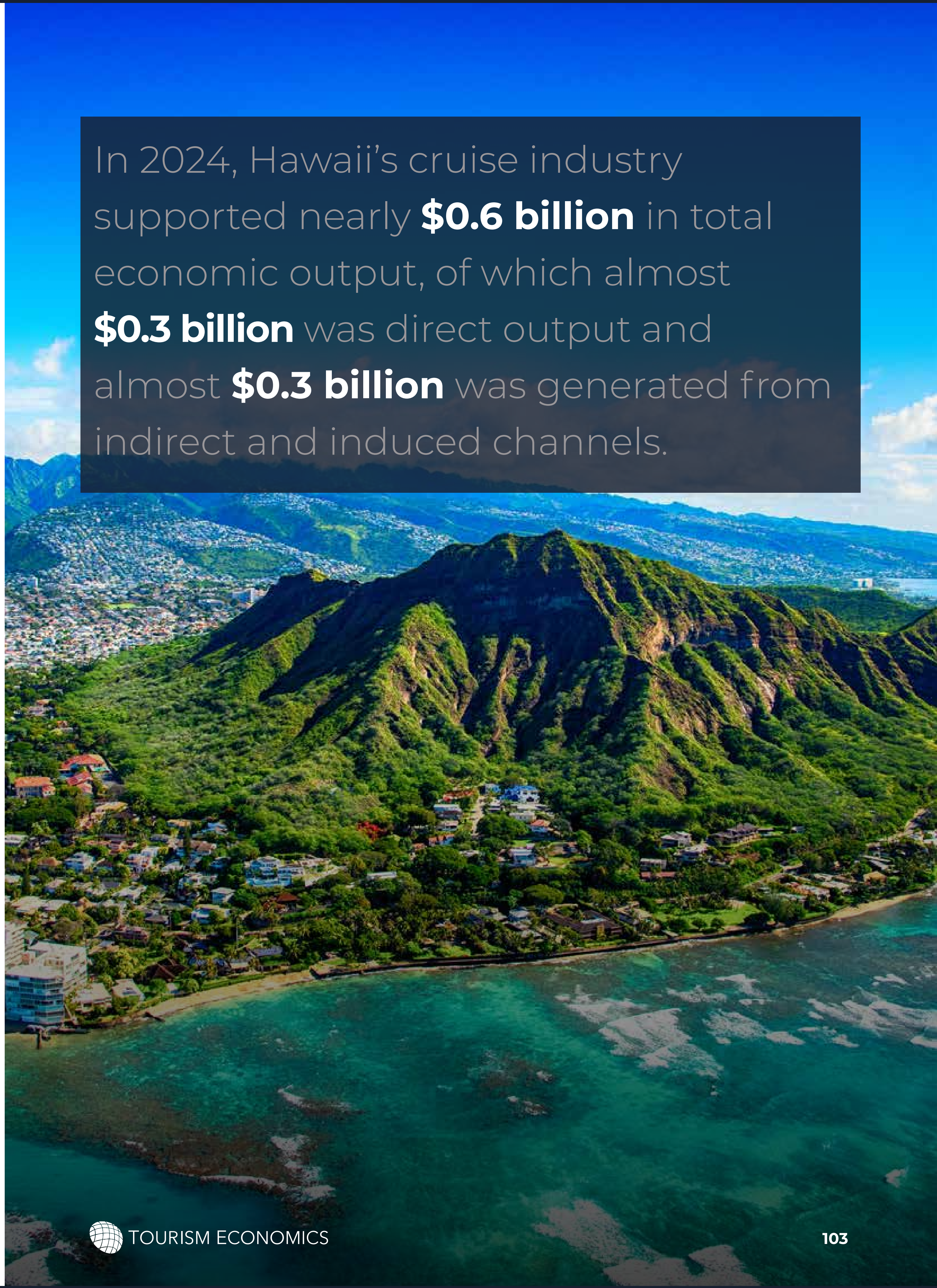
Fig. 100. Summary of cruise industry activity and impacts in Hawaii, 2024[16]

		Hawaii	United States
Passenger flows (000s)	Transit visits	1,000	11,308
	Embark	129	17,194
	Debark	256	17,227
	Total cruise visits	**1,385**	**45,729**
Spend ($ Millions)	Passenger and crew spend	139	9,995
	Cruise line purchases	163	20,137
	Ship- and capacity-building	-	3
	Cruise line staff wages	1	2,819
	Total spend	**303**	**32,954**
Output ($ Millions)	Direct	281	31,844
	Indirect and induced	273	43,652
	Total output	**554**	**75,496**
GDP ($ Millions)	Direct	153	16,608
	Indirect and induced	161	24,820
	Total GDP	**314**	**41,428**
Employment (Jobs)	Direct (cruise line employment)	<100	23,300
	Direct (expenditure linked)	1,500	151,100
	Indirect and Induced	1,000	158,300
	Total employment	**2,600**	**332,700**

Note: Values may not sum due to rounding
Source: Oxford Economics

[16] Whilst debarkations are included in the total passengers' figure, only transit and embarkations have been taken into account for economic impact calculations.

In 2024, Hawaii's cruise industry supported nearly **$0.6 billion** in total economic output, of which almost **$0.3 billion** was direct output and almost **$0.3 billion** was generated from indirect and induced channels.



SUMMARY OF ALL STATES

Fig. 101. Summary impacts of cruise industry activity across all US states

		Total Output ($ mn)	Total GDP ($ mn)	Total Employment (Jobs)
1	Florida	30,189	16,707	172,100
2	California	7,496	4,433	24,900
3	Texas	6,553	3,405	24,500
4	New York	3,282	1,986	10,600
5	Washington	2,879	1,736	11,800
6	Alaska	2,144	1,206	11,400
7	New Jersey	1,690	980	6,100
8	Louisiana	1,530	768	7,600
9	Georgia	1,381	722	4,300
10	North Carolina	1,131	559	3,500
11	Massachusetts	1,093	621	3,500
12	Pennsylvania	1,072	582	3,100
13	Illinois	1,062	569	3,000
14	South Carolina	1,057	537	4,700
15	Ohio	1,003	501	3,200
16	Maryland	891	488	3,200
17	Virginia	845	444	2,400
18	Michigan	840	413	2,700
19	Tennessee	728	374	2,200
20	Arizona	687	355	2,100
21	Hawaii	554	314	2,600
22	Colorado	540	284	1,500
23	Indiana	528	261	1,700
24	Alabama	525	244	2,000
25	Missouri	518	260	1,600
26	Minnesota	464	244	1,300
27	Utah	420	206	1,300
28	Wisconsin	396	205	1,300
29	Oklahoma	353	169	1,100
30	Connecticut	341	190	800
31	Kentucky	336	159	1,100
32	Nevada	320	170	1,000
33	Oregon	304	158	900
34	Arkansas	237	111	800
35	Kansas	223	111	700
36	Mississippi	215	94	800
37	Maine	214	116	1,000
38	Iowa	204	103	700
39	District of Columbia	148	82	200
40	Nebraska	143	73	400
41	Idaho	137	65	400
42	Rhode Island	131	69	500
43	New Hampshire	125	67	300
44	New Mexico	116	56	400
45	West Virginia	102	47	300
46	Delaware	99	52	300
47	Montana	63	32	200
48	South Dakota	59	31	200
49	North Dakota	54	27	200
50	Vermont	40	20	100
51	Wyoming	37	18	100
	United States	**75,496**	**41,428**	**332,700**

Note: Values may not sum due to rounding

Source: Oxford Economics

ABOUT THE RESEARCH TEAM

OXFORD ECONOMICS

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