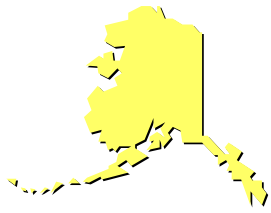


# THE CRUISE INDUSTRY IN ...



# ALASKA

## Economic Benefit of the Cruise Industry in Alaska (2010)

- Alaska benefits from the cruise industry as the premiere cruise destination market in the United States. In 2010, Alaska accounted for \$930 million in direct cruise industry spending. The state ranks fifth in the nation in cruise industry expenditures.
- The cruise industry's spending generated 21,305 full- and part-time jobs and wages totaling \$850 million in income for Alaska workers in 2010.
- During peak season, the cruise lines employed more than 5,000 workers in the state in 2010.
- During 2010, Alaska ports received 4.7 million crew and cruise passenger visits, nearly 23 percent of all passenger and crew visits at U.S. ports. Passenger and crew onshore spending averaged \$101 per person per visit for a estimated total of \$481 million.
- While primarily handling port-of-call visits, Alaska has homeporting operations as well, generating 127,700 passenger embarkations on turnaround cruises between Alaska and Vancouver / Seattle.
- Major businesses in Alaska most impacted by the spending of the cruise industry generally include tourism-related industries such as airlines, hotels and tour operators; services & Government, food processing; construction firms; employment agencies; trucking companies and utilities; receiving \$634 million in 2010.

## Nationwide, the Cruise Industry Generates...

- \$37.9 billion in total economic benefits
- \$18 billion in direct spending by the cruise lines and passengers on U.S. goods and services
- 329,943 total U.S. jobs generated by cruise expenditures
- \$15.24 billion in total wages for U.S. employees



# THE CRUISE INDUSTRY IN ...



# CALIFORNIA

## Economic Benefit of the Cruise Industry in California (2010)

- In 2010, California received \$1.8 billion, or nearly 10% of the U.S. total, in direct spending from the cruise industry. The state ranked second in the nation in cruise industry expenditures.
- Cruise industry spending generated 41,697 jobs and wages totaling almost \$2.2 billion in income for California workers.
- California's ports embarked 1.1 million passengers in 2010. The four major California ports of Los Angeles, Long Beach, San Diego and San Francisco accounted for 11 percent of total U.S. embarkations.
- There were 1.1 million Californians who took a cruise in 2010. This number also accounted for about 11 percent of all U.S. cruise passengers.
- California is also home to cruise line headquarters, including Princess Cruises, Cunard Line, Crystal Cruises and Uniworld Boutique River Cruise Collection.
- Major California suppliers that most benefit from cruise line spending include tourism-related businesses such as travel agents, airlines and hotels; food processing; ship repair companies; advertising agencies; insurance companies; petroleum refining; business service providers; and entertainment and amusement industries.

## A Selection of Cruise Industry Strategic Business Partners (CLIA Executive Partners) in California

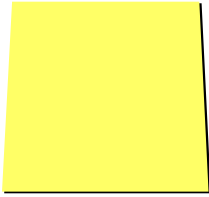
- The Port of Los Angeles Partners, LLP
- UK P&I Club
- Kaye, Rose & Partners, LLP
- Port of San Diego
- CSA Travel Protection
- Port of San Francisco

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# THE CRUISE INDUSTRY IN ...



# COLORADO

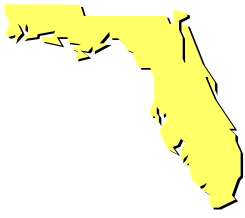
## Economic Benefit of the Cruise Industry in Colorado (2010)

- Colorado has no direct cruise operations, but as a source maker for cruise passengers, the economic impact remains significant.
- Colorado accounted for \$411 million in cruise industry direct spending in 2010, ranking the state tenth in the nation for industry expenditures.
- The cruise industry's spending generated 2,473 jobs and \$132 million in income for Colorado workers.
- The state of Colorado is the location of cruise line headquarters for Avalon Waterways, part of the Globus family of travel brands.
- Tourism related businesses such as travel agencies, airlines and hotels accounted for 4% or \$17.8 million of the cruise industry's direct spending. Approximately \$83 million was spent in top five support industries such as rail transportation, equipment manufacturing, wholesale trade, advertising, accounting and insurance.

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# THE CRUISE INDUSTRY IN ...



# FLORIDA

## Economic Benefit of the Cruise Industry in Florida (2010)

- Florida is the cruise capital of the U.S. and ranked first in the nation for cruise industry expenditures with \$6.3 billion in direct spending, accounting for 35 percent of total industry direct expenditures.
- Cruise industry spending generated 123,255 jobs and wages totaling nearly \$5.4 billion in income for Florida workers.
- Florida's five cruise ports handled 5.8 million embarkations, which accounted for nearly 60 percent of all U.S. cruise embarkations.
- The state of Florida is the home of corporate or administrative offices for 12 CLIA member cruise line brands, including the top three cruise companies that own three-fourths of the North American industry cruise capacity: Carnival Corporation & plc, Royal Caribbean Cruises, Ltd., and NCL Corporation. Overall, these three companies employ nearly 14,000 people representing 55 percent of the cruise industry employment throughout the United States.
- Florida also leads the country in resident cruise passengers with 2.9 million passengers, or 29 percent, of all U.S. resident passengers.
- Major Florida industries that benefit from cruise line spending include travel agencies, airlines, hotels, restaurants, food processors, chemical manufacturers, advertising agencies, management and technical consulting companies, manpower agencies, recreation and amusements, manufacturers of machinery and fabricated metal products, interior designers, interior designers and computer services consultants.

## A Selection of Cruise Industry Strategic Business Partners (CLIA Executive Partners) in Florida

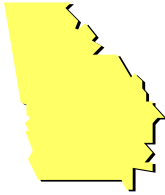
- |   |                                   |
|---|-----------------------------------|
| - Allin Interactive Corporation             | - Port Canaveral                  |
| - Amadeus North America LLC                 | - Port Everglades                 |
| - Bank Atlantic                             | - Port of Miami                   |
| - Bolidt Systhetic Products & Systems       | - Port of Palm Beach              |
| - DNV Det Norske Veritas                    | - RINA                            |
| - Educational Institute                     | - Special Needs Group             |
| - Fidelio Cruise Software Inc               | - Tampa Port Authority            |
| - Fowler White Burnett P.A.                 | - The Image Group                 |
| - Germanischer Lloyd SE                     | - Total Marine Solutions          |
| - Hamilton, Miller & Birthisel LLP          | - Unisource Worldwide, Inc        |
| - Jacksonville Port Authority               | - Universal Marine Medical Supply |
| - K & L Gates, LLP                          | - Wärtsilä                        |
| - L-3 Communications Marine & Power Systems | - Waste Management                |
| - Lloyd's Register North America            | - Wilhelmssen Marine Group        |
| - MAN Diesel                                | - Wireless Maritime Services      |
| - MTN Satellite Communications              |                                   |
| - Marshal Islands                           |                                   |
| - McAlpin Conroy, P.A.                      |                                   |
| - McRoberts Maritime Security, Inc.         |                                   |
| - MHG Services, Inc.                        |                                   |

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# THE CRUISE INDUSTRY IN ...



# GEORGIA

## Economic Benefit of the Cruise Industry in Georgia (2010)

- Georgia accounted for \$605 million in cruise industry direct spending in 2010 which represents 3.4% of the U.S. total. Georgia ranks seventh in the nation for industry expenditures.
- The cruise industry's spending generated 9,501 jobs and \$452 million in income for Georgia workers.
- With no direct cruise operations, Georgia is a source market for cruise passengers. Resident cruise passengers totaled 218,000, 2.2 percent of U.S. resident passengers.
- Tourism-related businesses such as tour operators, airlines, hotels, restaurants and providers of ground transportation were the beneficiaries of the cruise industry spending along with food processors, manufacturing, advertising, insurance, management and technical consulting in the non-manufacturing sectors.

## A Selection of Cruise Industry Strategic Business Partners (CLIA Executive Partners) in Georgia

Delta Air Lines  
Unisource Worldwide, Inc.  
The Coca-Cola Company

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# THE CRUISE INDUSTRY IN ...



# HAWAII

## Economic Benefit of the Cruise Industry in Hawaii (2010)

- Hawaii accounted for \$347 million in direct spending, representing nearly 2 percent of the industry's total U.S. direct expenditures.
- In 2010, cruise industry spending generated 6,591 jobs and \$216 million in income for Hawaii workers, ranking the state eleventh in the nation in terms of cruise industry spending.
- During 2010, passenger and crew visits to Hawaii destinations totaled approximately 479,000.
- Tourism-related industries including tour operators, airlines and hotels received 76 percent of the direct expenditures of the cruise industry in Hawaii. Other industries impacted by the cruise industry include food processors, petroleum refiners, insurance companies, health care service providers and advertising agencies.

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# THE CRUISE INDUSTRY IN ...



# ILLINOIS

## Economic Benefit of the Cruise Industry in Illinois (2010)

- Illinois accounted for \$486 million in cruise industry direct spending in 2010. Illinois ranks ninth in the nation for industry expenditures.
- The cruise industry's spending generated 6,858 jobs and \$361 million in income for Illinois workers.
- While Illinois has no direct cruise operations, it was a significant source market for cruise passengers and provided vendor support for cruise and cruise tour operations.
- There were 224,000 residents from Illinois who took a cruise vacation in 2010.
- Typical Illinois businesses most significantly impacted by the spending of the cruise industry included air transportation, travel and advertising agencies, insurance companies, computer services, software and technical consultants, food processors, paper products and apparel and textile manufacturers.

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# THE CRUISE INDUSTRY IN ...



# LOUISIANA

## Economic Benefit of the Cruise Industry in Louisiana (2010)

- Louisiana accounted for \$208 million in cruise industry direct spending in 2010, an annual increase of 9.5%.
- Cruise industry spending generated 4,454 jobs (+26%) and \$163 million in income for Louisiana workers.
- In 2010, passenger embarkations from The Port of New Orleans numbered 260,000 for an annual increase of 25,000.
- The number of cruise passengers from the West South Central region (Louisiana, Texas, Arkansas and Oklahoma) was 1.3 million passengers in 2010, which accounts for 13.1 percent of U.S.-resident cruise passengers.
- Business sectors in Louisiana most significantly impacted by cruise industry spending included transportation, business services and government and manufacturing.

## A Selection of Cruise Industry Strategic Business Partners (CLIA Executive Partners) in Louisiana

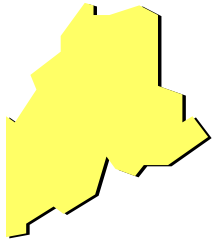
- Board of Commissioners of the Port of New Orleans

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# THE CRUISE INDUSTRY IN ...



# MAINE

## Economic Benefit of the Cruise Industry in Maine (2010)

- In 2010, Maine accounted for more than \$36 million in cruise industry direct spending, a nearly 5 percent increase over 2009.
- The cruise industry generated 692 (+9%) jobs and wages totaling \$21.2 million in income for Maine workers.
- The number of cruise passengers from New England was 796,000 passengers in 2010 which accounts for 7.9 percent of U.S.-resident cruise passengers.
- Maine businesses most impacted by cruise industry spending in 2010 included business services, government, manufacturing, wholesale and retail trade.

## A Selection of Cruise Industry Strategic Business Partners (CLIA Executive Partners) in Maine

- Maine Port Authority  
-The City of Portland Maine  
The Town of Bar Harbor

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# THE CRUISE INDUSTRY IN ...



## Economic Benefit of the Cruise Industry in Maryland (2010)

- In 2010, Maryland accounted for nearly \$189 million in cruise industry direct spending, an increase of 10.5% over 2009.
- The cruise industry generated 2,868(+14.37%) jobs and wages totaling \$142 million in income for Maryland workers.
- The number of cruise passengers from the South Atlantic region (Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia and West Virginia) totaled 3.7 million and is the single largest source of passengers, accounting for 36.9 percent of all U.S.-resident passengers.
- Cruises from Baltimore are typically on Bermuda or Eastern Caribbean itineraries.
- Business sectors in Maryland most impacted by cruise line and passenger spending included business services and government, transportation and manufacturing.

## A Selection of Cruise Industry Strategic Business Partners (CLIA Executive Partners) in Maryland

- Port of Baltimore/Cruise Maryland

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# THE CRUISE INDUSTRY IN ...



# MASSACHUSETTS

## Economic Benefit of the Cruise Industry in Massachusetts (2010)

- In 2010, Massachusetts accounted for \$492 million in cruise industry direct spending, a 7.2 percent increase over 2009. The state ranks eighth nationally for economic impact from the cruise industry, rising from the number 11 position in 2008.
- Cruise industry spending generated 7,521 jobs and \$429 million in income for Massachusetts' workers.
- The Port of Boston is both a port of embarkation and a port-of-call for cruises to Canada and Bermuda. Passenger embarkations in 2010 numbered 84,000, a 5 percent annual increase.
- Total passenger and crew visits, including port-of-call visits, increased by 18.6 percent to 332,000. These visits generated an estimated \$25.6 million in passenger and crew onshore spending.
- Massachusetts residents also enjoy cruising with 605,000 residents taking cruise vacations. The number accounted for 6.0 percent of total U.S. residents who took a cruise in 2010.
- Businesses in Massachusetts provide services to cruise ships homeported in Boston as well as support services to the industry in general. Tourism-related businesses received nearly \$269 million. Other industries benefiting from cruise industry purchases include: management consulting firms, petroleum companies; advertising and insurance agencies; computer software and equipment manufacturers; food processors; legal services; and educational and training institutions.

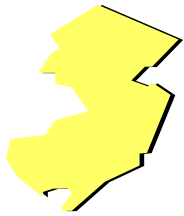
## A Selection of Cruise Industry Strategic Business Partners (CLIA Executive Partners) in Massachusetts

- CruisePort Boston
- K & L Gates, LLP

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# THE CRUISE INDUSTRY IN ...



# NEW JERSEY

## Economic Benefit of the Cruise Industry in New Jersey (2010)

- In 2010, New Jersey accounted for \$347 million in cruise industry direct spending. The state ranks twelfth nationally for economic impact from the cruise industry.
- The cruise industry generated 6,339 jobs and wages totaling \$344 million in income for New Jersey workers.
- New Jersey benefits as homeport operations for cruises from Cape Liberty Cruise Port in Bayonne, N.J. In 2010, passenger embarkations from Cape Liberty totaled 196,000 passengers.
- New Jersey business sectors most impacted by the industry's \$347 million in spending included business services and government, transportation and nondurable and durable goods manufacturing.

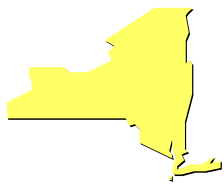
## A Selection of Cruise Industry Strategic Business Partners (CLIA Executive Partners) in New Jersey

- Ports America
- UK P&I Club
- UBM LIVE

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# THE CRUISE INDUSTRY IN ...



# NEW YORK

## Economic Benefit of the Cruise Industry in New York (2010)

- New York accounted for 6.7 percent of cruise industry direct expenditures with nearly 1.2 billion in direct spending. The state ranked third in industry expenditures.
- The cruise industry's spending generated 18,833 jobs and wages totaling \$822 million in income for New York workers.
- The Manhattan and Brooklyn Cruise Terminals embarked 553,000 cruise passengers making New York the nation's fourth busiest cruise port during 2010.
- The number of New York residents who took a cruise in 2010 totaled 388,000 accounting for 3.9 percent of the nearly 9.7 million total U.S. cruise passengers.
- Typical major businesses in New York most impacted by the spending of the cruise industry include: tourism-related businesses such as travel agencies, hotels and airlines; businesses within the manufacturing sector such as food processors, textile and apparel manufacturers, and pharmaceutical companies; and advertising agencies and financial services companies in the nonmanufacturing sector

## A Selection of Cruise Industry Strategic Business Partners (CLIA Executive Partners) in New York

- Bahamas Maritime Authority
- Berkely Travel AON Affinity
- Destination Quebec
- Germanischer Lloyd SE
- INTERCRUISE Shoreside & Port Services
- McRoberts Maritime Security
- NYCruise/New York City Economic Development Corp.
- Universal Marine Medical Supply

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# THE CRUISE INDUSTRY IN ...



# PENNSYLVANIA

## Economic Benefit of the Cruise Industry in Pennsylvania (2010)

- In 2010, Pennsylvania accounted for \$333 million in cruise industry direct spending, ranking thirteenth in U.S. spending.
- Cruise industry spending generated 5,896 jobs and \$279 million in income for Pennsylvania workers.
- The Mid-Atlantic region (Pennsylvania, New York and New Jersey) was a source of 849,000 cruise passengers in 2010.
- Pennsylvania is primarily a source market for cruise passengers and a provider of support services to the industry. Those business sectors most significantly impacted by the spending of the cruise industry included transportation, administrative and waste management companies, professional, scientific and technical services, durable and nondurable manufacturing and finance and insurance.

## A Selection of Cruise Industry Strategic Business Partners (CLIA Executive Partners) in Pennsylvania

- Allin Interactive Corporation
- Business Research and Economic Advisors (BREA)
  - Delta Air Lines
  - L-3 Communications

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# THE CRUISE INDUSTRY IN ...

## South Carolina

### Economic Benefit of the Cruise Industry in South Carolina (2010)

- In 2010, South Carolina accounted for \$71 million in cruise industry direct spending.
- The cruise industry generated 1,306 jobs and wages totaling \$48 million in income for South Carolina workers.
- The number of cruise passengers from the South Atlantic region (Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia and West Virginia) totaled 3.7 million and is the single largest source of passengers, accounting for 37 percent of all U.S.-resident passengers.
- South Carolina businesses most impacted by cruise industry spending in 2010 included business services, government, manufacturing and transportation.

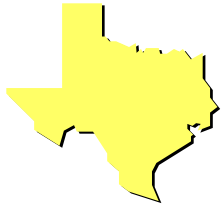
### A Selection of Cruise Industry Strategic Business Partners (CLIA Executive Partners) in South Carolina

Port Charleston – South Carolina State Ports Authority

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# THE CRUISE INDUSTRY IN ...



# TEXAS

## Economic Benefit of the Cruise Industry in Texas (2010)

- The North American cruise industry contributed \$1.1 billion in direct spending to the Texas economy in 2010.
- Cruise industry spending generated 16,457 jobs and \$828 million in income for Texas workers.
- The Texas port of Galveston served primarily as a point of embarkation for cruises to the western Caribbean and welcomed 635,000 passenger and crew visits in 2010, 3.0 percent of all passenger and crew visits in the United States. These visits are estimated to have produced \$43.7 million in passenger and crew onshore spending, or nearly \$69 per person per visit. There were 446,000 2010 embarkations at Texas ports representing 4.6 percent of total U.S. embarkations.
- Texas residents that cruised in 2010 totaled 1.1 million, accounting for 11.0 percent of all U.S. cruise passengers.
- Typically, tourism-related businesses such as travel agencies, airlines and hotels receive approximately half of industry direct expenditures in Texas. Other businesses impacted include petroleum refining, advertising and employment agencies, insurance carriers, technical consulting services, food processing, communication and navigation equipment manufacturing and apparel manufacturing.

## A Selection of Cruise Industry Strategic Business Partners

### (CLIA Executive Partners) in Texas

- Germanischer Lloyd (USA)
- Lloyd's Register North America, Inc.
  - Port of Galveston
  - Port of Houston Authority
- Wartsila North America, Inc.
  - Waste Management
  - Wilhemsen Group

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# THE CRUISE INDUSTRY IN ...



# VIRGINIA

## Economic Benefit of the Cruise Industry in Virginia (2010)

- In 2010, Virginia accounted for \$141 million in direct cruise industry spending, ranking the state twenty-fourth in the nation in terms of cruise industry spending.
- The cruise industry's spending created 2,330 jobs and wages totaling \$121 million in income for Virginia workers in 2010.
- Virginia is part of the South Atlantic region, which is the single largest source of cruise passengers, accounting for 3.7 million passengers in 2010, or 37 percent of all U.S. resident cruisers.
- Business sectors in Virginia most impacted by cruise line and passenger spending included government services such as professional, scientific, technical, administrative and waste management services, as well as the transportation and manufacturing sectors.

## A Selection of Cruise Industry Strategic Business Partners

### (CLIA Executive Partners) in Virginia

- International Registries Inc./The Marshall Islands Registry
- Port of Norfolk, Cruise Norfolk
- The Liberian Registry

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# THE CRUISE INDUSTRY IN ...



# WASHINGTON

## Economic Benefit of the Cruise Industry in Washington (2010)

- In 2010, Washington accounted for \$688 million in cruise industry direct spending. This accounted for nearly four percent of the cruise industry's direct economic impact. The state ranks sixth nationally for economic impact from the cruise industry.
- Cruise industry spending generated 17,326 jobs and \$787 million in income for Washington workers.
- The state of Washington is the location of cruise line headquarters for Holland America Line and Windstar Cruise Line.
- Seattle, the nation's fifth busiest cruise port, is a growing port of embarkation. The Port of Seattle had 464,000 passenger embarkations in 2010 which represents nearly 5 percent of all U.S. embarkations.
- The Pacific region (Washington, California, Alaska, Hawaii and Oregon) was the source of 1.3 million cruise passengers in 2010.
- Washington businesses most impacted by the spending of the cruise industry included tourism-related businesses such as travel agencies, airlines, hotels, restaurants and providers of ground transportation. Other industries benefiting from the cruise industry included: food processors; ship repair companies; advertising and marketing agencies; engineering and design companies; and management consulting firms.

## A Selection of Cruise Industry Strategic Business Partners (CLIA Executive Partners) in Washington

- Bellegrove Medical Supply
- MTN Satellite Communications
- Port of Seattle

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