



**NORTH WEST
CRUISESHIP
ASSOCIATION**

**AAPA
Cruise Workshop
February, 2005**

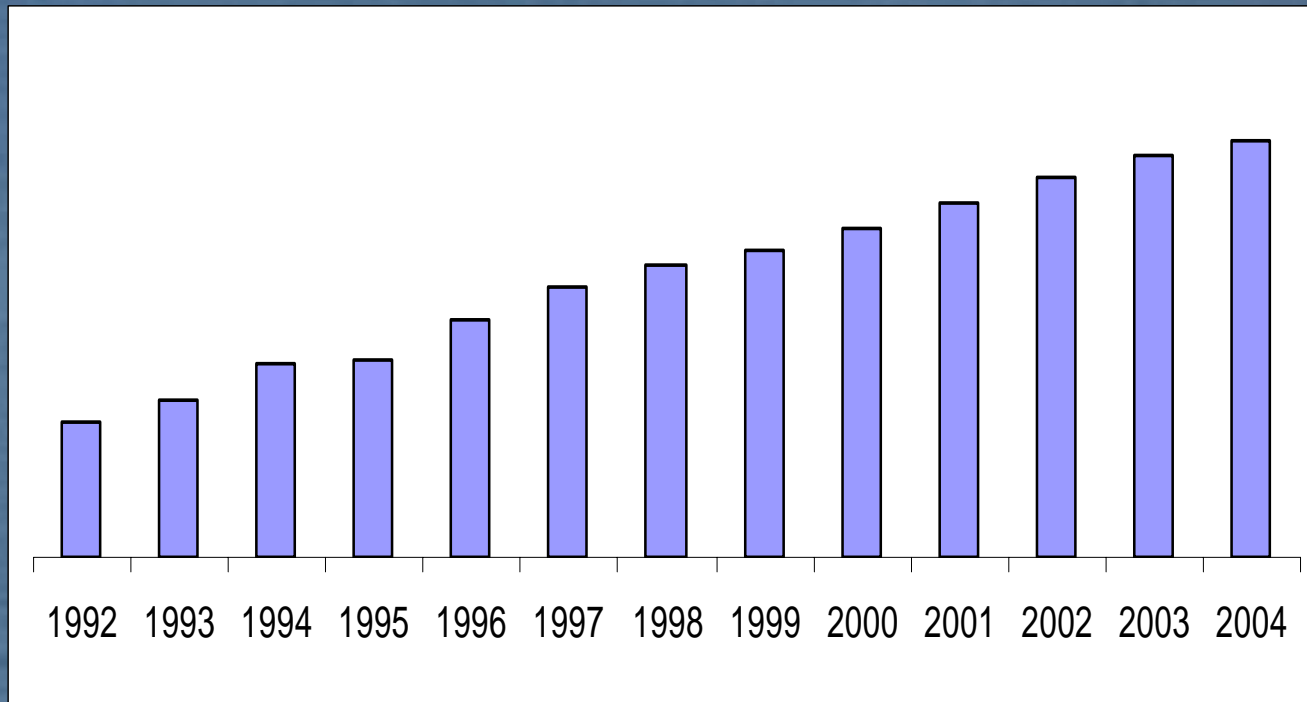


The History of NWCA

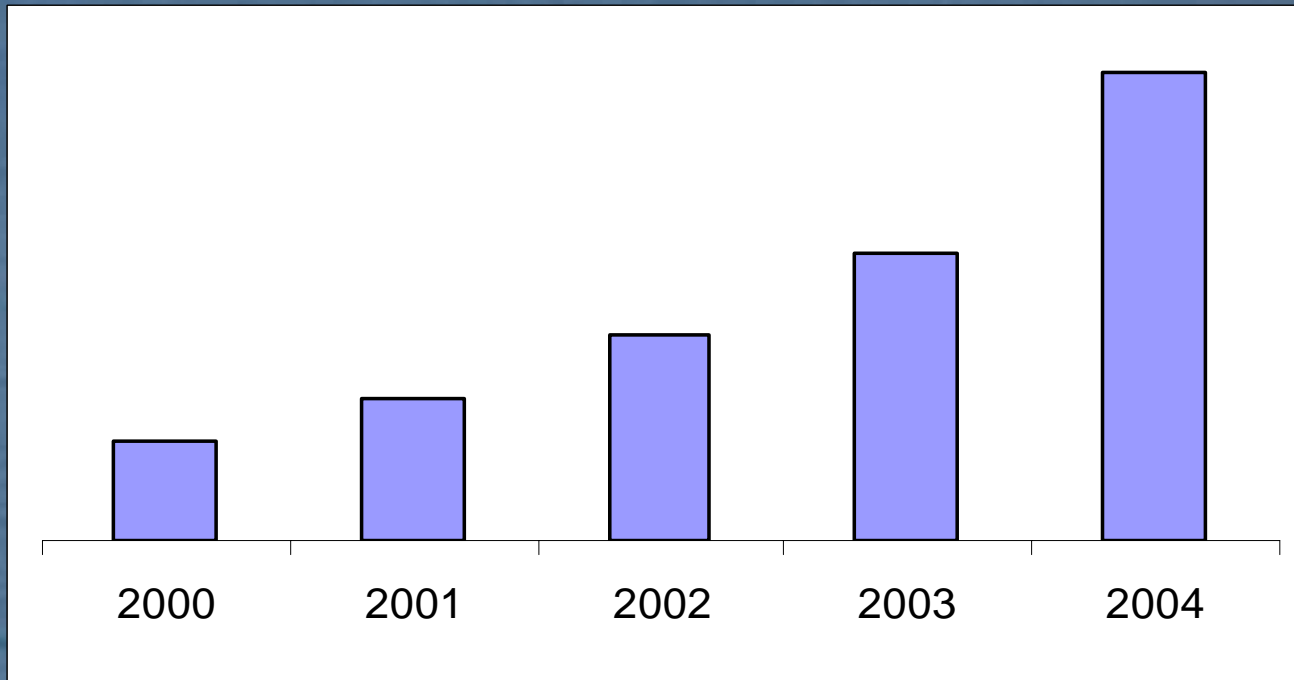


- Established in 1986, initially for the purpose of providing security services to the member lines.
- Role later expanded to include government relations on legal and regulatory issues, communications and community relations.

Cruise Market Growth in Alaska

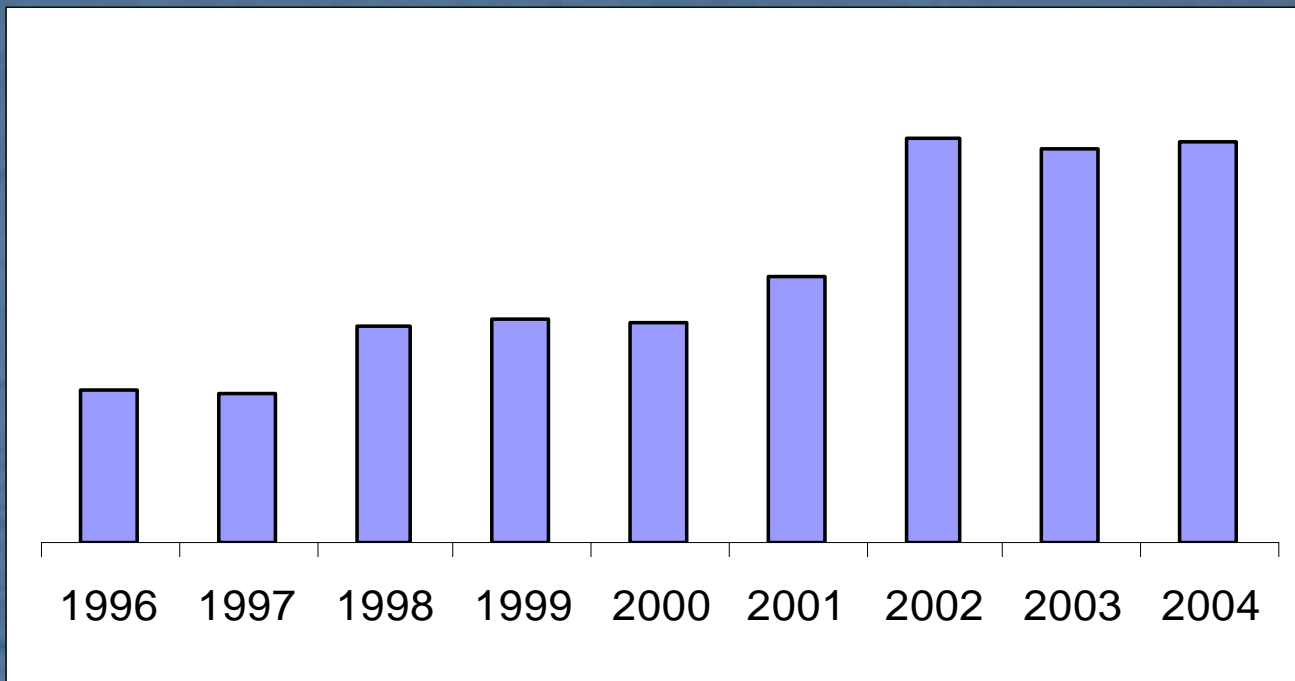


Cruise Market Growth in Seattle



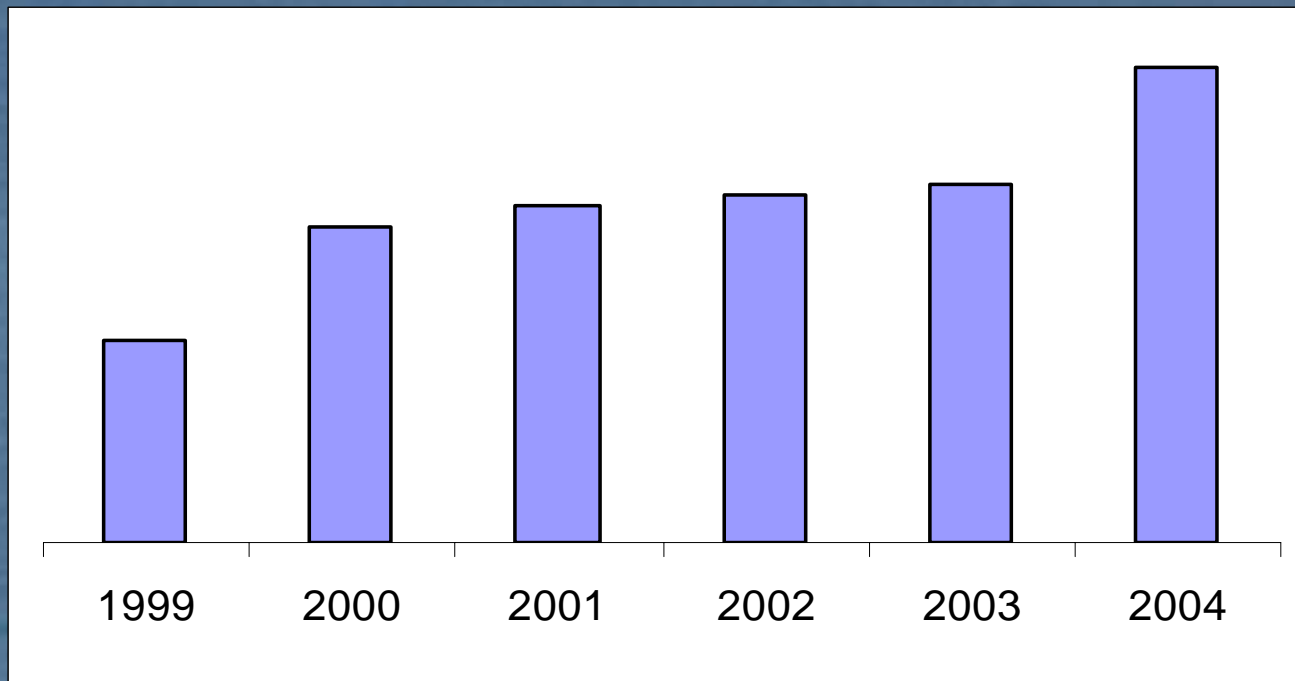
CRUISE SEATTLE

Cruise Market Growth in Hawaii



DBEDT

Cruise Market Growth in the St. Lawrence & Atlantic Canada



BREA, SLCA, ACCA

NWCA Board of Directors

- Dean Brown, Chairman – Princess Cruises
- Robert Kritzman, Vice Chair – NCL
- Brendan Corrigan – Carnival Cruise Lines
- Adam Goldstein – Royal Caribbean Int.
- John Krousouloudis – Celebrity Cruises
- Kirk Lanterman – Holland America
- Dick Procopio – Princess Cruises
- Christian Sauleau – Radisson Seven Seas Cruises
- Joe Valenti – Crystal Cruises

The Role of NWCA

A stylized map of North America is shown in the background, with the landmasses in a light tan color and the surrounding oceans in a dark blue color. The map is positioned on the right side of the slide, partially overlapping the text area.

- Security operations in Port of Vancouver
- Communications
- Government Relations
- Research – polling/economic impact studies
- Project planning/ Regulations

CHALLENGES

A stylized map of the United States coastline is shown in the background, rendered in a light blue color against a dark blue background. The map highlights the eastern and southern coasts, including the Gulf of Mexico and the Florida peninsula.

1. Pilotage

- Tug boat services
- Costs
- Training
- Compulsory Pilotage areas

2. Security

- Consistency
- Canada vs US Differences
- Destination Ports & Home Ports

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3. Canada / US Border Delays

4. Environmental

- Consistency
- Alaska Waste Water Testing
- Reporting
- MOU's / Legislation / Guidelines
- New Pressures on air emissions

5. Port Infrastructure

- Timely / cost effective development
- Financing
- Public vs. private investment
- Dock / Uplands development
(Ketchikan / Juneau)
- Competition for berths & scheduling

6. Taxes & Fees

- Alaska Cruise Ship Petition
- Local pressures

NWCA Linkages

A stylized map of North America is shown in the background, with the landmasses in a light tan color against a dark blue background. The map is partially visible on the right side of the slide.

NWCA ↔ ICCL



- Alaska Steamship Assoc.
- BC Chamber of Shipping
- Cnd. Shipping Federation
- Alaska Steamship Response
- Pacific Merchant Shipping Assoc.
- St. Lawrence Cruise Assoc.
- Atlantic Canada Cruise Assoc.
- Cruise Industry Assoc. of BC
- Alaska Travel Industry Assoc.
- Visitors Benefit Alaska
- Hawaii Tourism Association
- American Association of Port Authorities





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