
American Association of Port Authorities

San Francisco - February 2008

NW Cruise Update

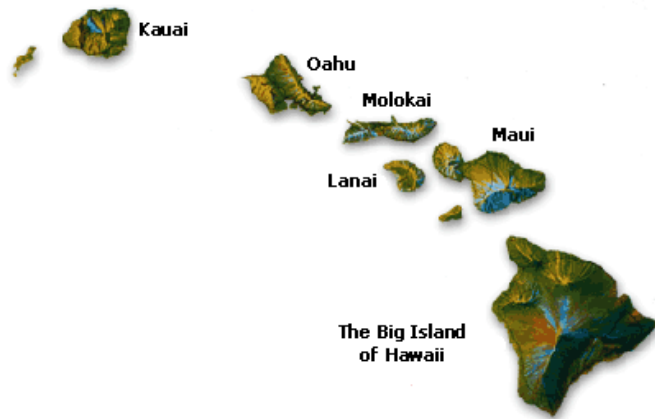
John Hansen

NWCA



NORTH WEST
CRUISESHIP
ASSOCIATION

NORTH WEST CRUISESHIP ASSOCIATION



NORTH WEST
CRUISESHIP
ASSOCIATION

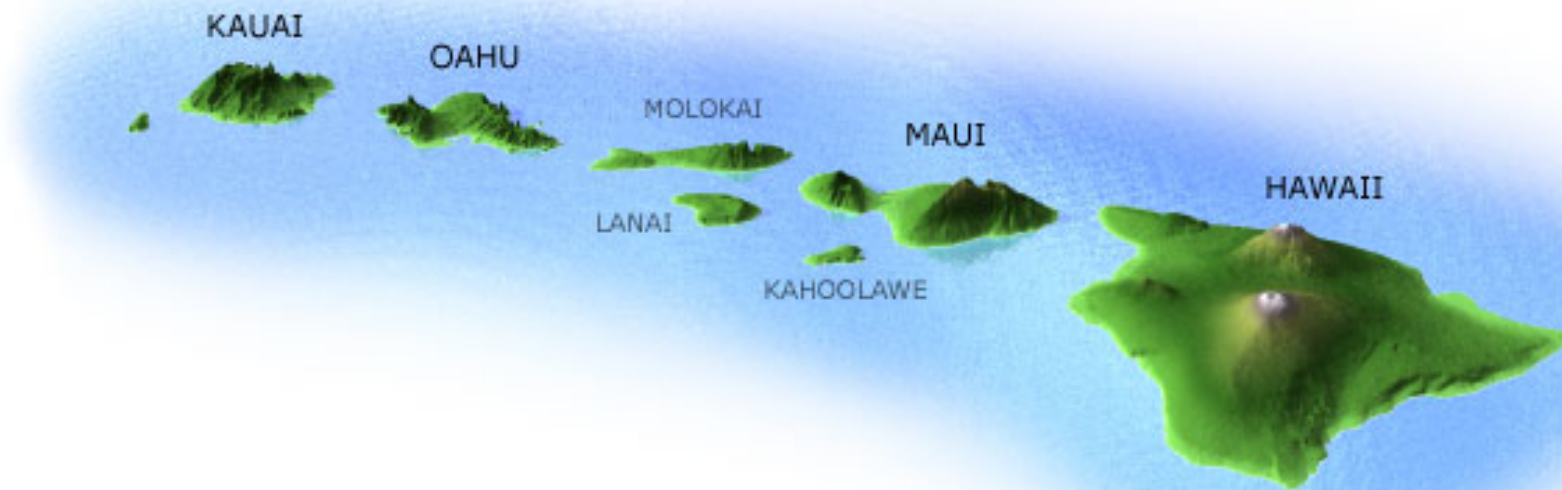
NORTH WEST CRUISESHIP ASSOCIATION

CRUISE DESTINATIONS

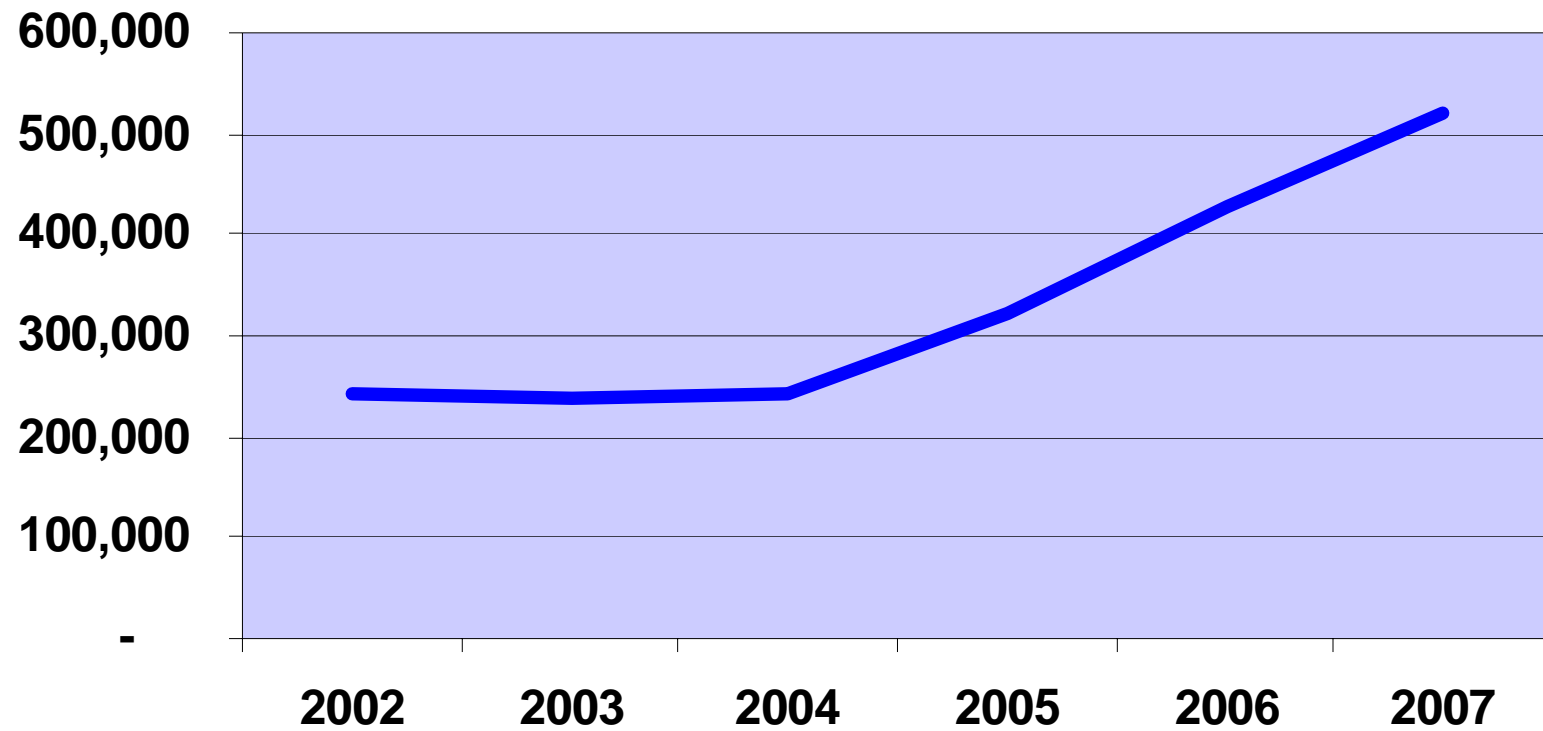
Caribbean/Bahamas	45.7%
Mediterranean	11.5%
Europe/Scandinavia	10.9%
Alaska	7.5%
Mexico West (Riviera)	4.8%
Trans-Panama Canal	3.9%
Hawaii	2.8%
Canada/New England	1.6%
Bermuda	2.1%
South America/Antarctica	2.5%
World Cruises	0.5%
Asia/Indian Ocean	0.5%
Others	5.7%



The Islands of Hawaii



HAWAII ANNUAL CRUISE PASSENGERS



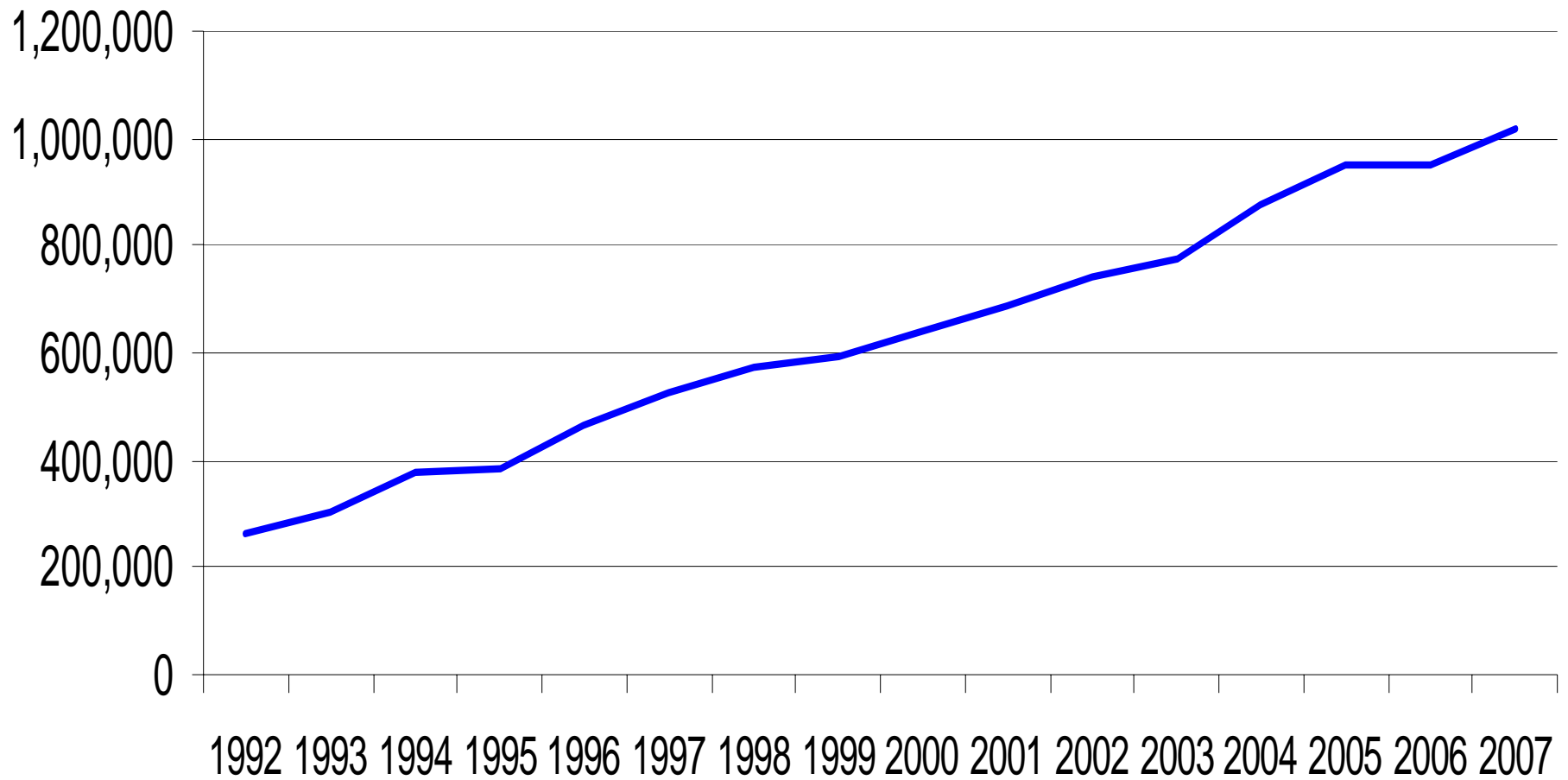
HAWAII

- CBP Passenger Vessel Services Act
- Port Development Plan
- Environmental Update
- HTA Cruise Impact Study

ALASKA



ALASKA CRUISE VISITORS



ALASKA PORTS



Haines



Ketchikan



Juneau

ALASKA PORTS



Wrangell

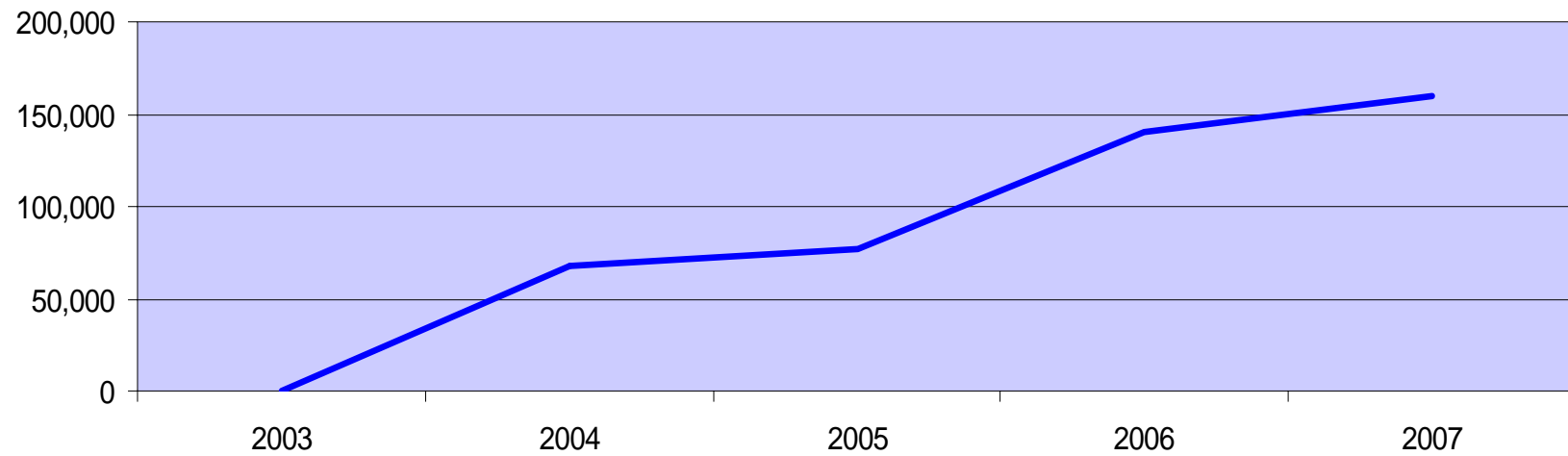


Skagway

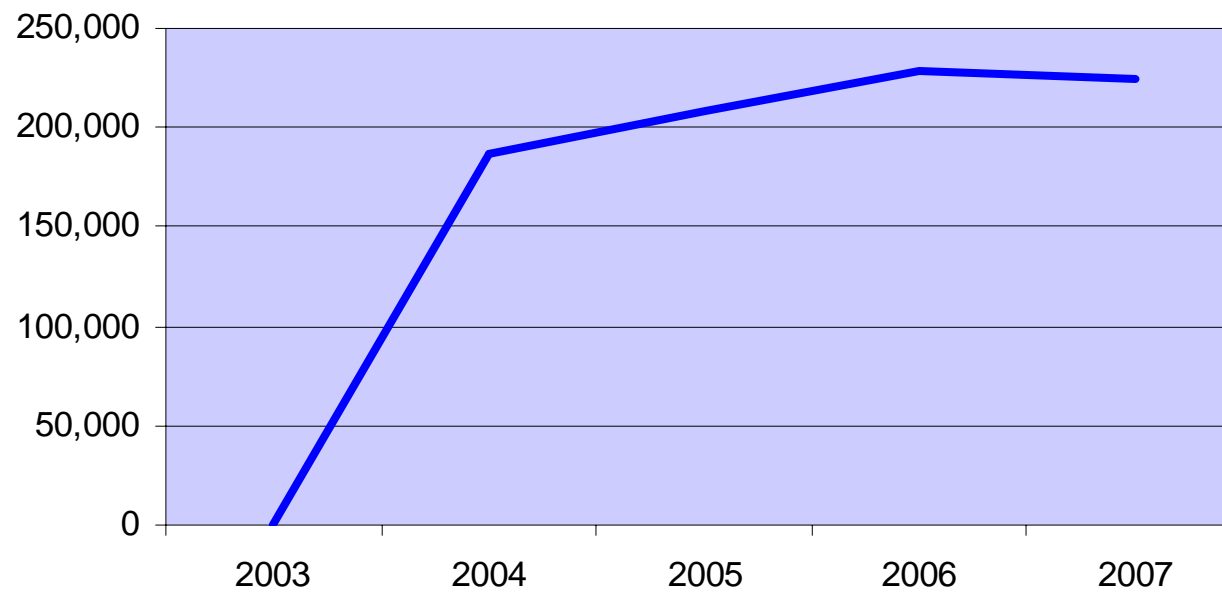


Sitka

POINT SOPHIA



WHITTIER



ALASKA

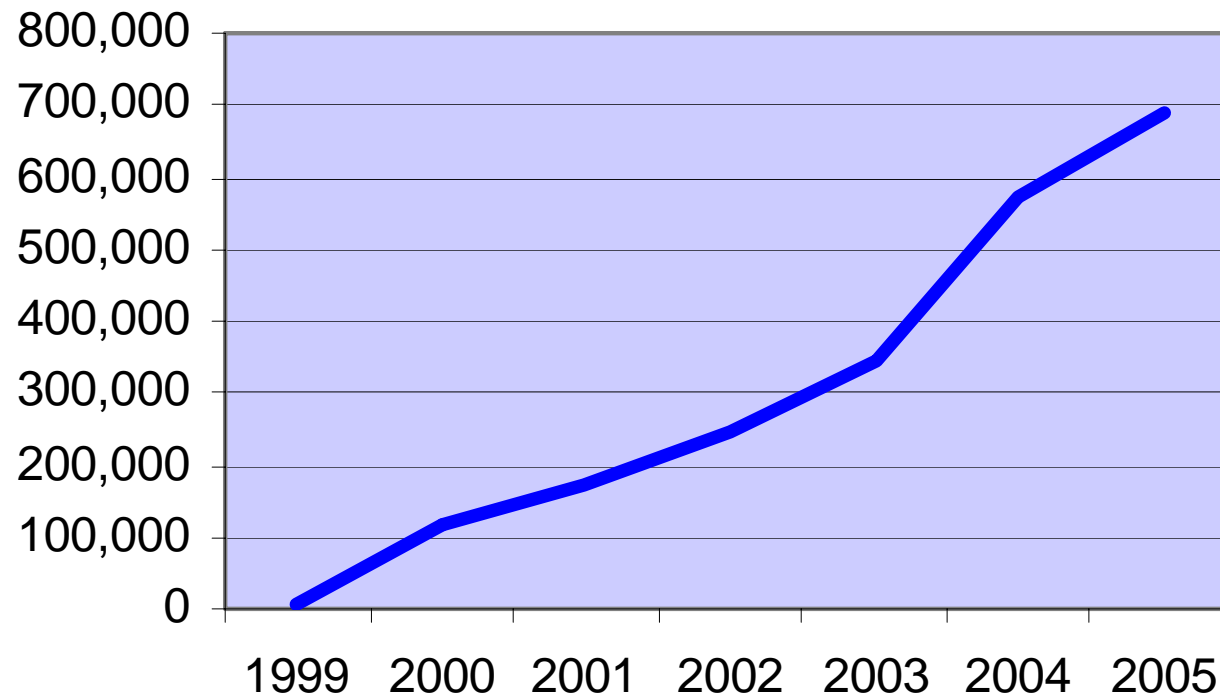
- Ballot Measure 2 (2006)
- Port Development
 - Ketchikan
 - Juneau



SEATTLE



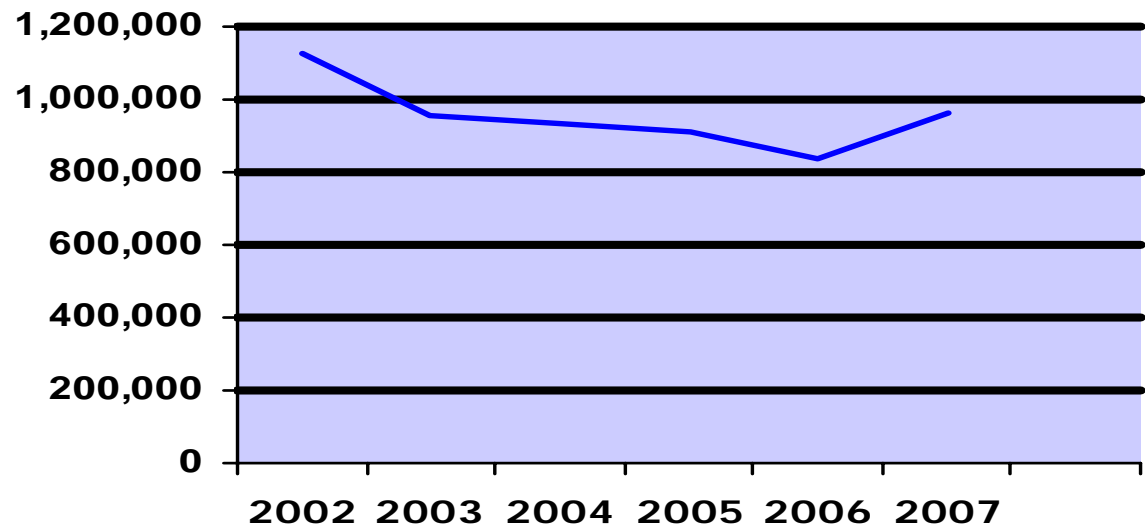
SEATTLE PASSENGERS



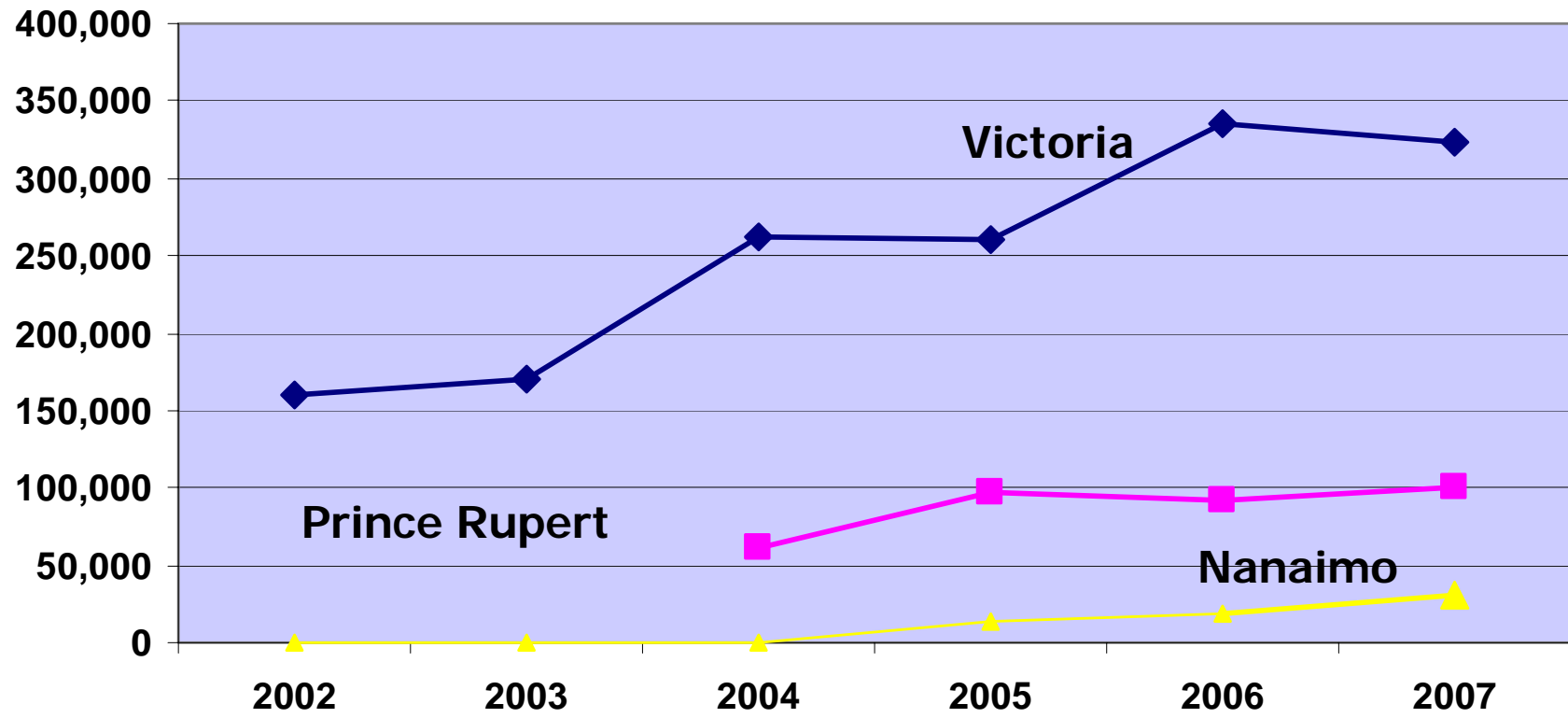
WASHINGTON

- Port Development
- Relocation of Terminal 30 to Terminal 91
- Environmental
 - NW Ports Clean Air Strategy
 - MOU
 - Bio-Mass / Ballast Water

VANCOUVER



VICTORIA – PRINCE RUPERT - NANAIMO





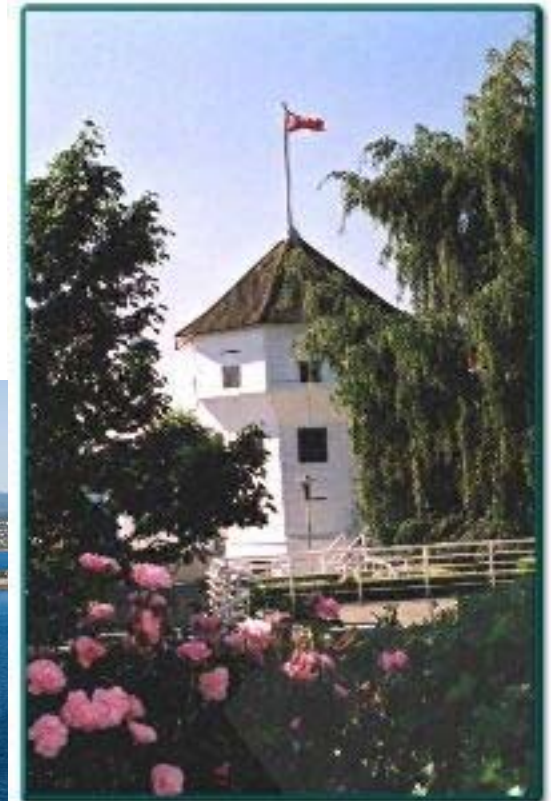
Victoria





Prince Rupert





BRITISH COLUMBIA

- Amalgamation of three Vancouver ports
- Air Emissions
- "Cruise BC"

Cruise Industry Economy Impact

(Based on 2006)

- Total cruise port visits in 2006 – 1.7 million
(increase of 200,000 over 2003)
- Cruise indirect & direct spending \$1.1 billion
- Total economic impact \$2.2 billion
- Total employment generated 16,000 jobs
- Taxes generated \$190 million
(indirect business & income tax)

Source BREA Draft Report December 2007



NORTH WEST

CRUISESHIP

ASSOCIATION