


AMERICAN ASSOCIATION OF PORT AUTHORITIES

FOCUS ON TRENDS & BEST PRACTICES

MAZATLAN, MEXICO
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John Hansen, North West CruiseShip Association



2009 Cruise Trends & Practices in the Northwest and Canada

“The good, the bad, and the ugly”

- Economic Reality
- Community & Port Relations
- Security & Border Issues
- Port Competition & Cooperation
- Environmental Regulations & Initiatives
- Taxation & Fees

2009 NWCA Member Lines

- Carnival Cruises
- Celebrity Cruises
- Crystal Cruises
- Disney Cruises
- Holland America Line
- Norwegian Cruise Line
- Princess Cruises
- Regent Seven Seas Cruises
- Royal Caribbean International
- Silversea Cruises



NWCA – North West CruiseShip Association

NWCA represents the major cruise lines operating in Canada and the Pacific Northwest – Alaska, Hawaii, and Washington.

ROLE

Facilitates communication between member lines, government, business, and communities,

Including:

- Legal and regulatory oversight.
- Community partnerships.
- Support of local organizations.
- Support of economic & environmental initiatives.

NWCA is located in Vancouver, BC, Canada and is a regional affiliate of Cruise Lines International Association.

ECONOMIC REALITY

- Weak market
- Aggressive marketing efforts by the cruise lines
- Large selection and competition in the vacation market

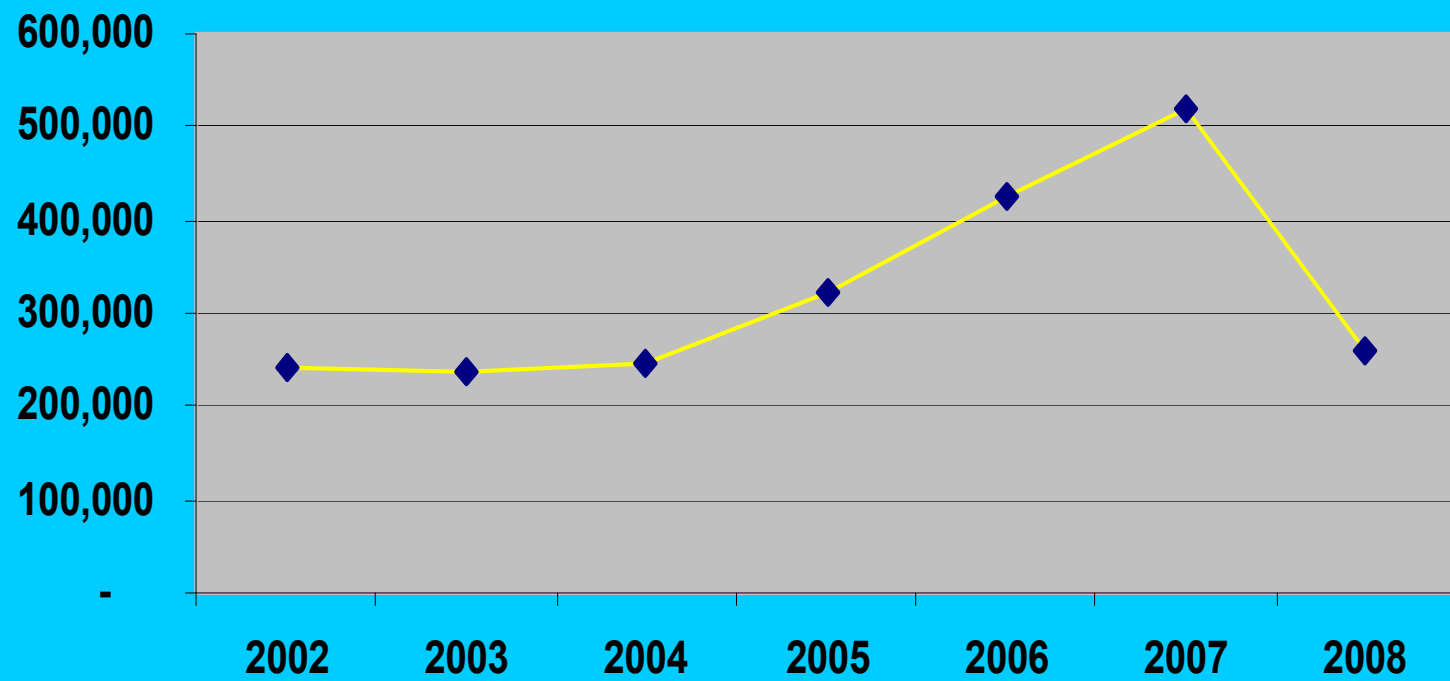
Effects

- Attention to costs
- Ship deployment
- Consumers & port development

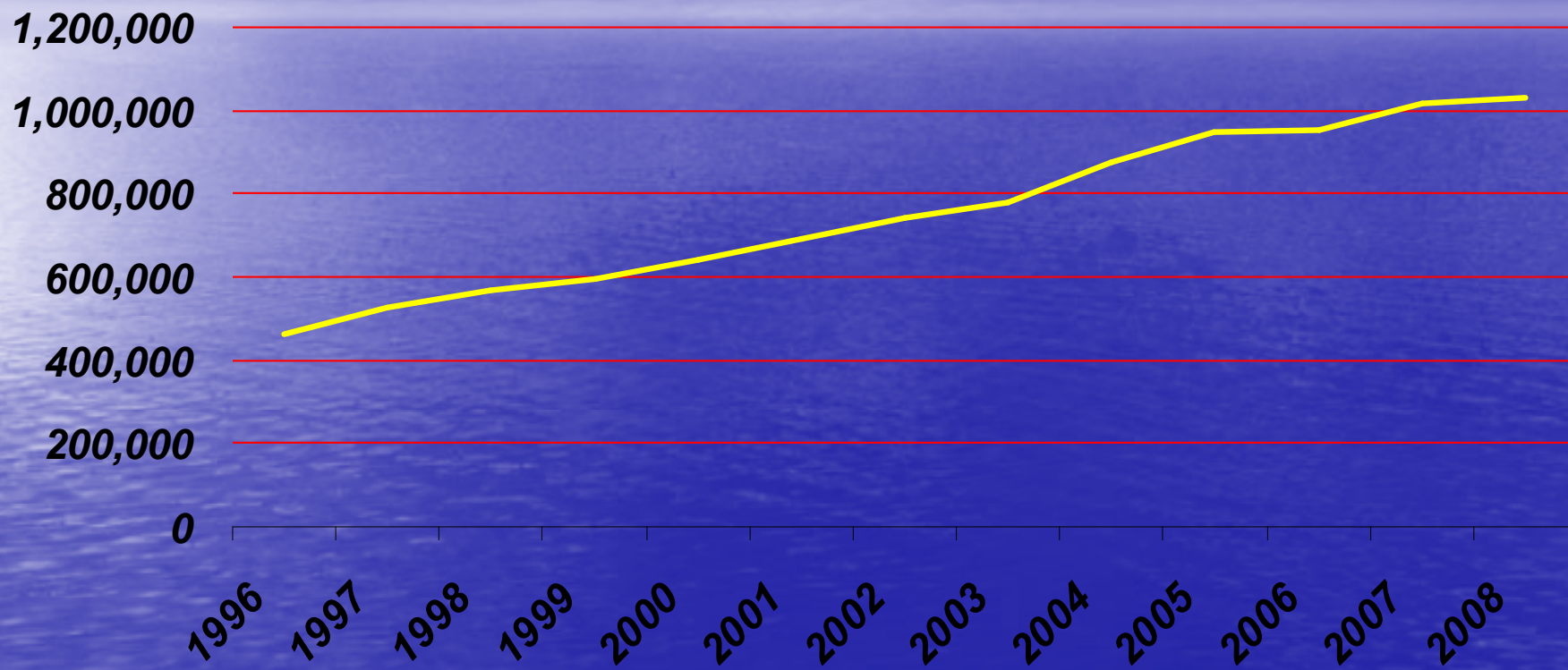
Government Effects

- Strong desire for infrastructure projects
- Canada's strong desire to grow the business

HAWAII ANNUAL CRUISE PASSENGERS



ALASKA CRUISE PASSENGERS



COMMUNITY & PORT RELATIONS

- Economic downturn
- Common interests of cruise lines and communities
- Infrastructure development
- Build understanding
 - School program
 - Environmental tours
 - Advisory Committee's

ALASKA PORTS



Skagway



Ketchikan



Juneau



Sitka





Halifax



Saint John, NB



Quebec City



Saguenay

SECURITY & BORDER ISSUES

- Maturing
 - ISPS
- New
 - TWIC and Canada's Transportation Security Clearance
 - Restricted areas and Escorts
- Western Hemisphere Travel Initiative
- Canada – U.S. border initiatives
 - NEXUS
 - FASTCARD
 - Enhanced drivers licenses

PORT COMPETITION & COOPERATION

- Quebec & Atlantic Canada and New England



- Cruise BC

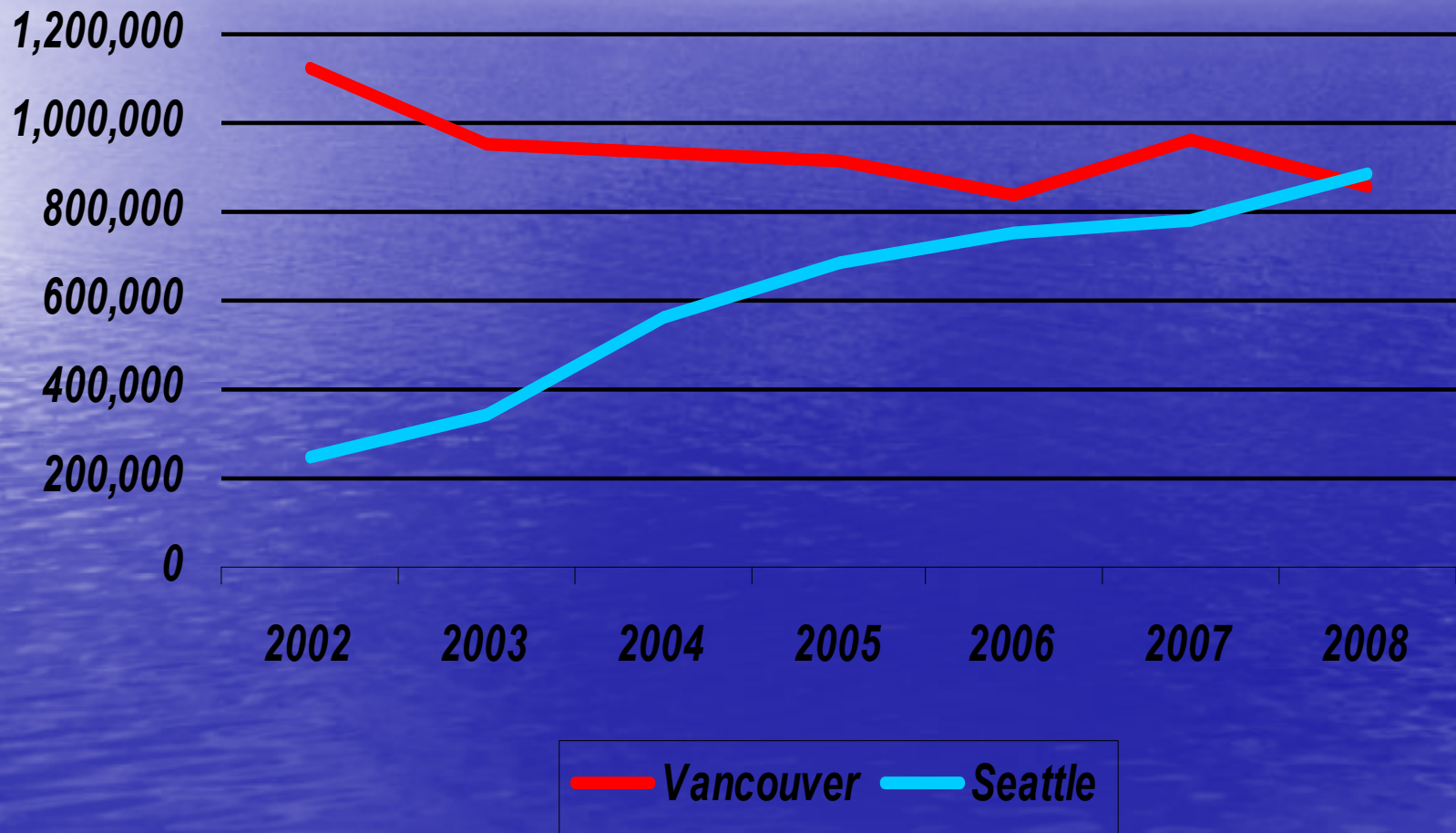
- Cruise the West

Cruise the west is a partnership of West Coast ports promoting the spectacular sights, eclectic adventures, and cultural experiences of the west coast of North America. Stretching from the untamed wilderness of Alaska, into the majesty of British Columbia, through the splendor of Washington, Oregon, and California, to tropical Mexico, Cruise the West offers cruise lines diversity on one coast and visitors a truly memorable experience.



- Vancouver & Seattle

VANCOUVER & SEATTLE PASSENGERS



ENVIRONMENTAL REGULATIONS & INITIATIVES

- EPA general permits – February 2009
- Individual States' regulations & requirements
- Canada & MARPOL
- Canadian Arctic pollution prevention
- MARPOL Annex VI – Air emissions & Emission Control Areas (ECA)
- Shore power plug in projects

Sulfer In Fuel (ECA'S)

Now to 2010	1.5%
2010 to 2015	1.0%
After 2015	0.1%

NOx

Staged reduction
From 14g / kwh to 2g / kwh in 2015

Port Metro Vancouver Shore Power

- Port Metro Vancouver will be the first port in Canada to implement shore power. The first ship to plug in will be the Golden Princess on May 5, 2009.
- Reduces marine diesel air emissions. An estimated 8,800 tonnes of greenhouse gas emissions will be saved per year.




Other Shore Power Projects

EXISTING

- Juneau Alaska, one installation completed 2001.
- Seattle, two installations.

PLANNED

- San Francisco, one installation.
- Los Angeles, two installations.
- San Diego, one installation.
- Long Beach, one installation.
- Brooklyn Red Hook, preliminary.

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- Taxation & Fees
 - Investing for the future

