

# REGIONAL CRUISING AND TOURISM

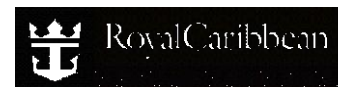
PRESENTATION TO AAPA CRUISE WORKSHOP

APR 24, 2013

*GREG WIRTZ, PRESIDENT  
NORTH WEST AND CANADA CRUISE ASSOCIATION*



# Our Members



# CLIA - Top Cruise Markets

**Alaska**  
**4.8%**

**Europe (no Med)**  
**10.9%**

**Caribbean**  
**34.4%**

**Mediterranean**  
**21.7%**

**Asia**  
**3.4%**

**South America**  
**3.9%**

**Australasia**  
**5%**

**Other Markets**  
**15.8%**

CLIA

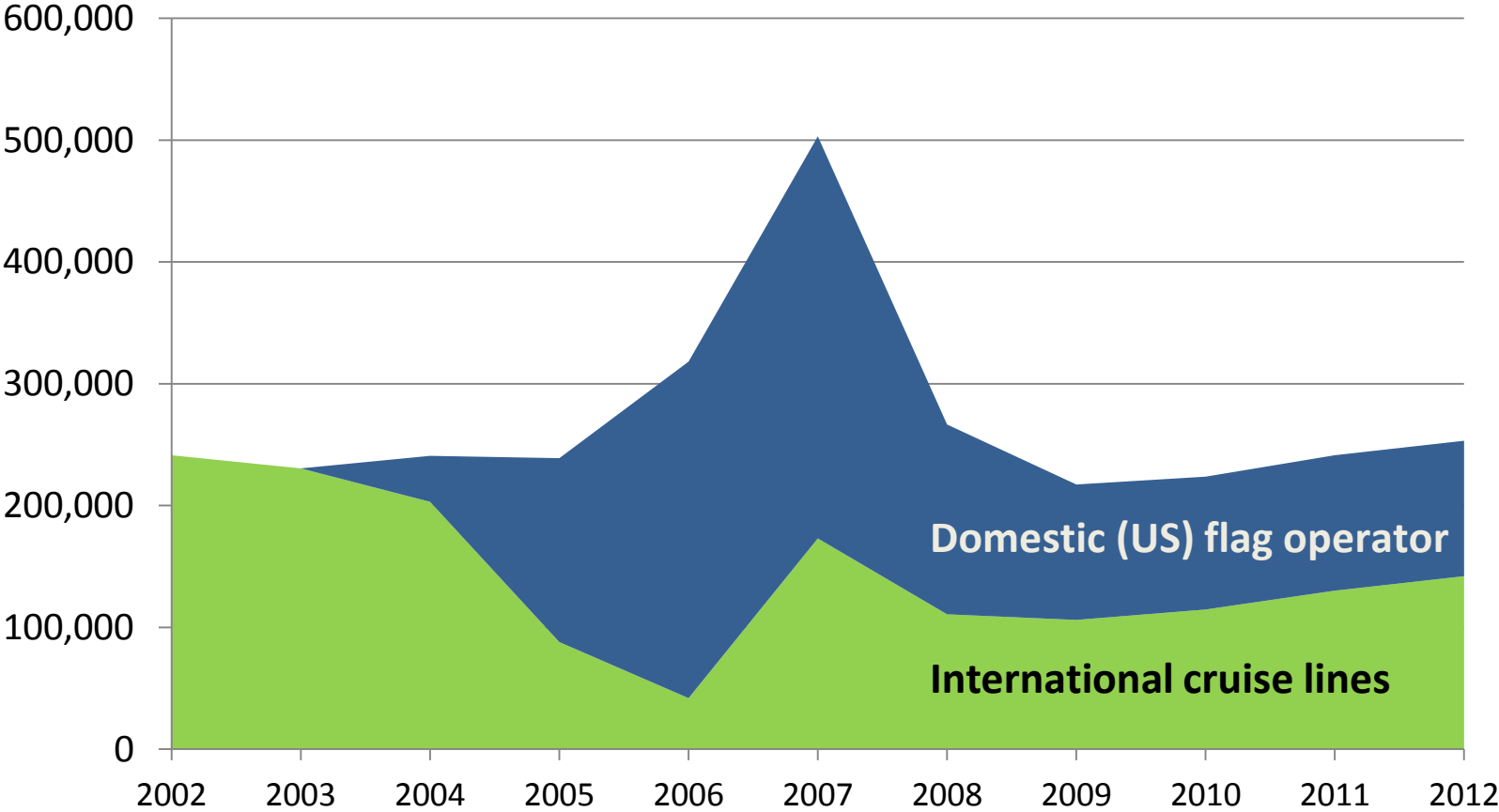
# CLIA - Cruise Markets

		2011	5 Year	2011	5 Year
Destination	Share	Share	Share shift	Bed Days	Change
1. Caribbean	33.7%		- 2.13 pts.	36.20 million	+ 13%
2. Mediterranean	20.4%		+4.00 pts.	21.99 million	+ 49%
3. Europe	7.9%		+0.29 pts.	8.47 million	+ 25%
4. <b>Alaska</b>	<b>6.2%</b>		<b>- 1.54 pts.</b>	<b>6.65 million</b>	<b>- 4%</b>
5. Bahamas	6.0%		+ 0.88 pts.	6.51 million	+ 40%
6. <b>Mexico (West)</b>	<b>3.3%</b>		<b>- 3.36 pts.</b>	<b>3.51 million</b>	<b>- 41%</b>
7. Transatlantic	2.9%		+0.42 pts.	3.10 million	+ 40%
8. Australia/S. Pac	2.7%		+1.58 pts.	2.92 million	+ 188%
9. Trans Canal	2.5%		- 0.47pts.	2.69 million	+ 1%
10. South America	2.4%		+0.07 pts.	2.63 million	+ 23%
11. <b>Hawaii</b>	<b>2.0%</b>		<b>-2.23 pts.</b>	<b>2.19 million</b>	<b>- 43%</b>
12. Canada/NE U.S.	1.8%		-0.03 pts.	1.92 million	+ 18%

# Hawaii

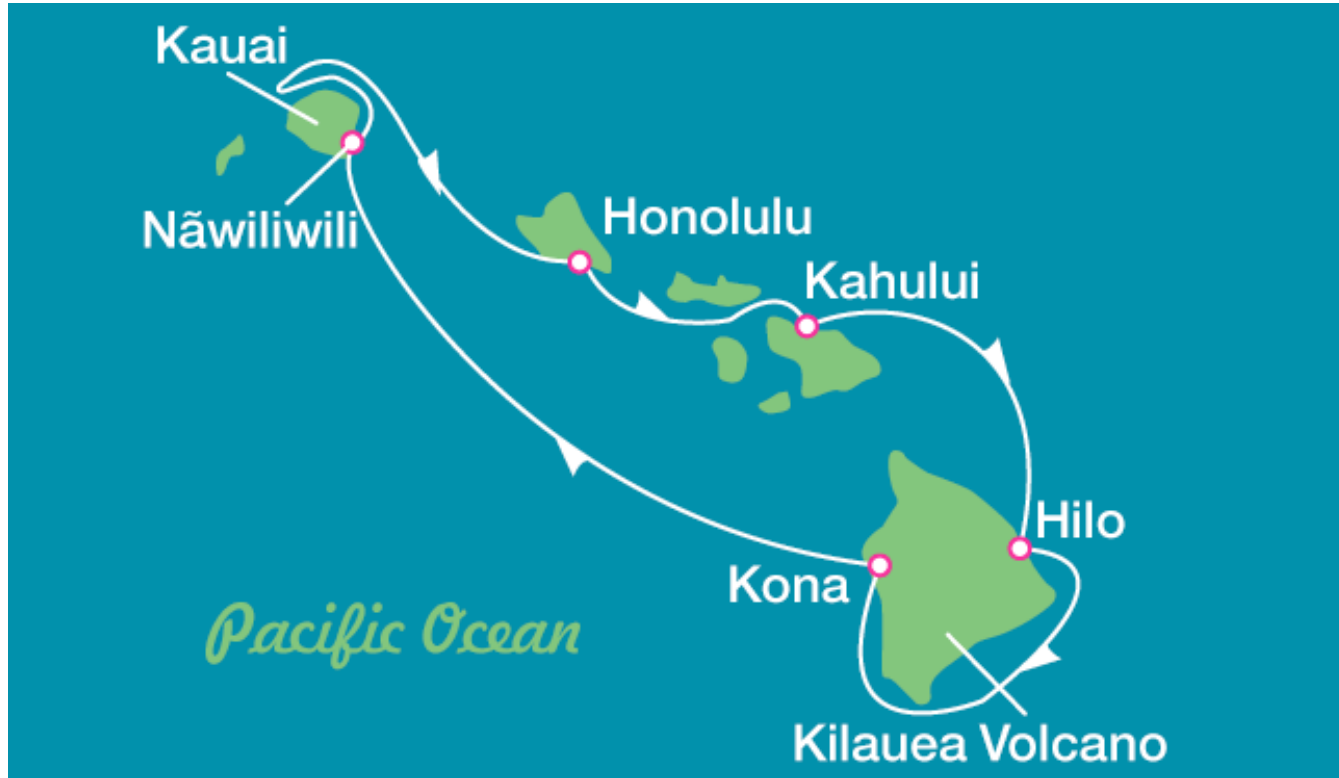


# Hawaii Cruise Passenger Trend



# Domestic Flag Cruise Itinerary

7-day roundtrip Honolulu



# Foreign Flag Cruise Itineraries





# Alaska and the Pacific Northwest



# Alaska Itineraries

## Vancouver – Round Trip



## Vancouver – One Way



## Seattle – Round Trip with Victoria Port Call



# Alaska Itineraries

## Alaska + Yukon Cruise Tour



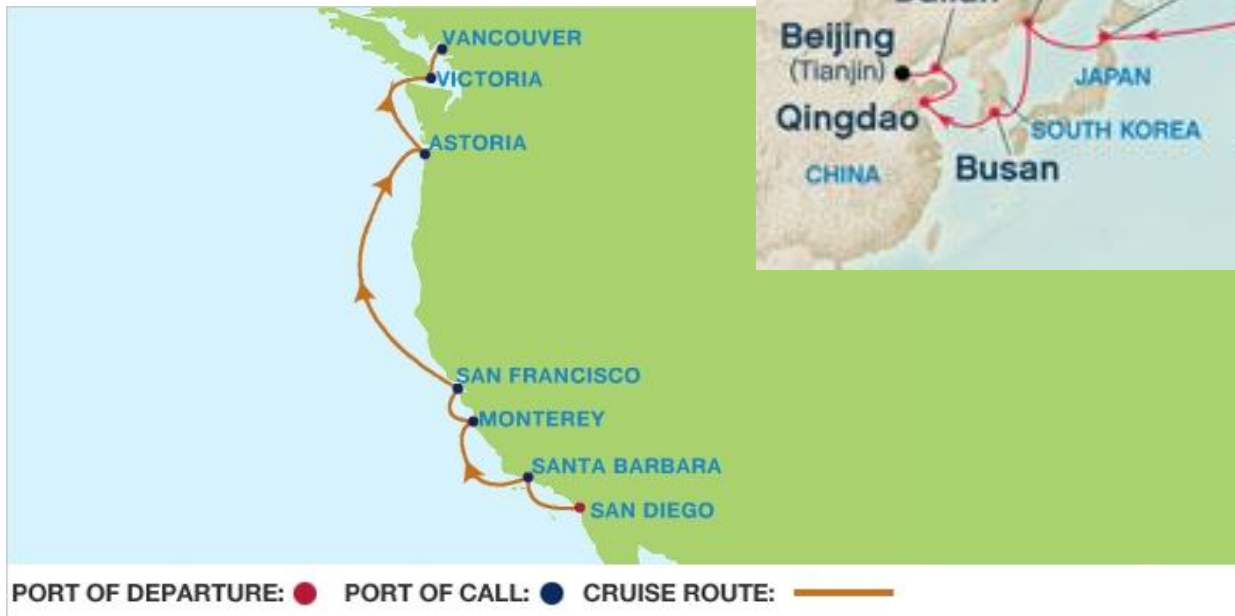
## San Francisco 10-day Alaska



# Repositioning itineraries

Alaska - Asia

Pacific Coastal



# Alaska Homeports

## Vancouver:

- “Foreign homeport”
- Expensive and limited airlift
- 4 border clearances
- Inside passage cruising

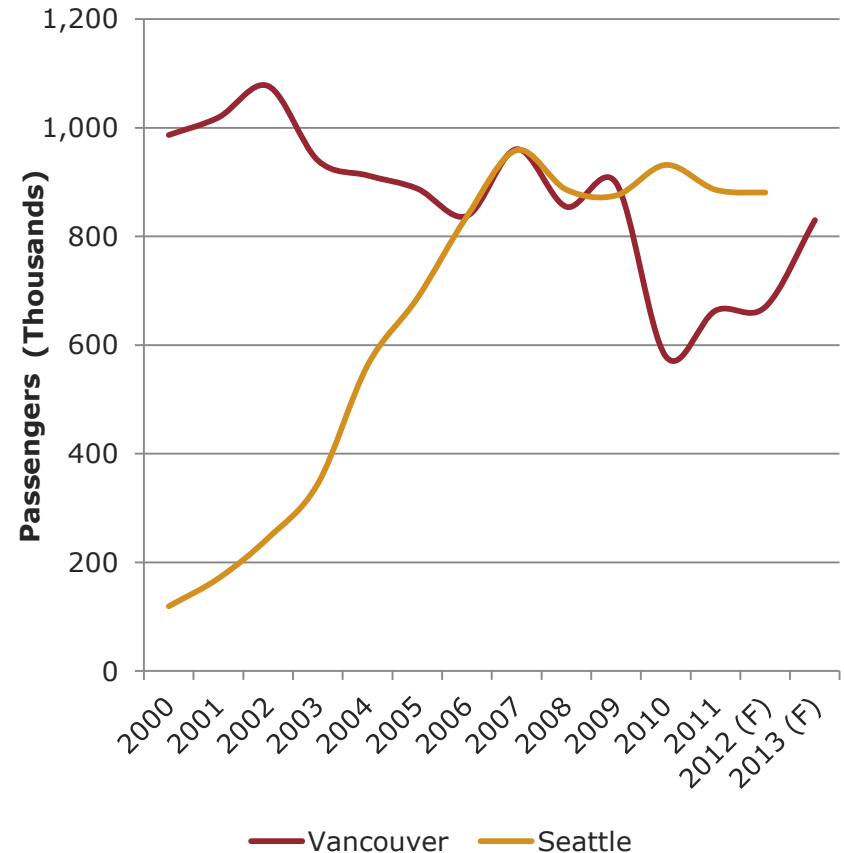
## Seattle:

- Domestic homeport
- Abundant, cheap airlift
- Minimal border clearances
- Further from Alaska
- “Foreign” port call required (usually Victoria)

## San Francisco:

- 10-11 day niche market

**Seattle and Vancouver Cruise Passenger Volumes 2000 - 2013**



# Alaska and PNW Issues

## Sustainability

- Economic - voter initiative issues:
  - Head taxes
  - Regulatory burden
  
- Environmental
  - Waste water
  - Air emissions (ECA)

# Managing Wastewater

## Advanced Wastewater Treatment Systems (AWTS)

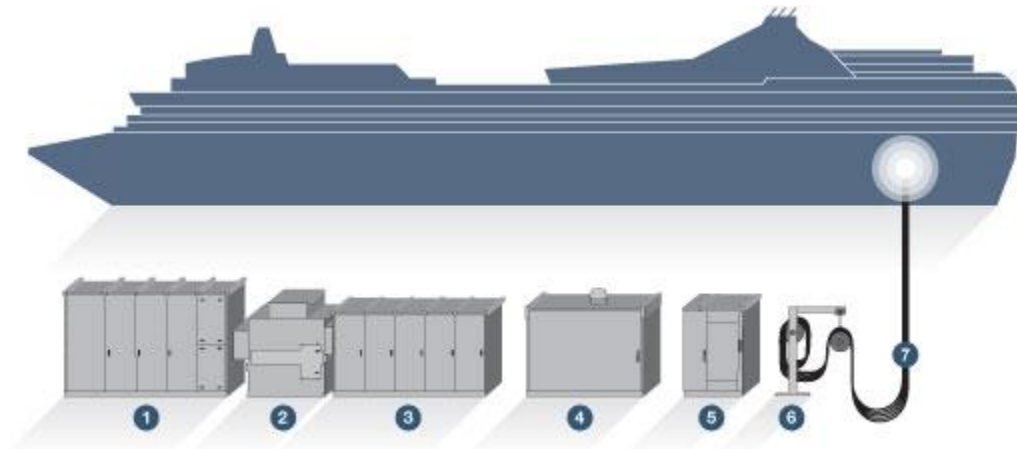
“AWTS were designed to meet required criteria for conventional pollutants (i.e. biochemical oxygen demand, fecal coliform bacteria, and total suspended solids) and are the most advanced, effective, and proven treatment systems available. When compared to municipal treatment plants discharging to marine waters in Alaska, the AWTSs in operation on discharging cruise ships are significantly more effective than most municipal systems.”

*Alaska DEC Commissioner Larry Hartig*

*Preliminary report to the Legislature, Jan 8, 2013*

# Reducing Air Emissions

- Shore power
- Low sulphur fuels
- ECA
- Exhaust gas scrubbers





# North American ECA



**THANK YOU**

