American Association of Port Authorities

San Francisco - February 2008
NW Cruise Update
John Hansen
NWCA
## Cruise Destinations

<table>
<thead>
<tr>
<th>Destination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caribbean/Bahamas</td>
<td>45.7%</td>
</tr>
<tr>
<td>Mediterranean</td>
<td>11.5%</td>
</tr>
<tr>
<td>Europe/Scandinavia</td>
<td>10.9%</td>
</tr>
<tr>
<td><strong>Alaska</strong></td>
<td><strong>7.5%</strong></td>
</tr>
<tr>
<td>Mexico West (Riviera)</td>
<td>4.8%</td>
</tr>
<tr>
<td>Trans-Panama Canal</td>
<td>3.9%</td>
</tr>
<tr>
<td><strong>Hawaii</strong></td>
<td><strong>2.8%</strong></td>
</tr>
<tr>
<td>Canada/New England</td>
<td>1.6%</td>
</tr>
<tr>
<td>Bermuda</td>
<td>2.1%</td>
</tr>
<tr>
<td>South America/Antarctica</td>
<td>2.5%</td>
</tr>
<tr>
<td>World Cruises</td>
<td>0.5%</td>
</tr>
<tr>
<td>Asia/Indian Ocean</td>
<td>0.5%</td>
</tr>
<tr>
<td>Others</td>
<td>5.7%</td>
</tr>
</tbody>
</table>
The Islands of Hawaii

KAUAI
OAHU
MOLOKAI
LANAI
KAHoolawe
MAUI
HAWAII
HAWAII ANNUAL CRUISE PASSENGERS

- 100,000
- 200,000
- 300,000
- 400,000
- 500,000
- 600,000

2002 2003 2004 2005 2006 2007
HAWAII

• CBP Passenger Vessel Services Act

• Port Development Plan

• Environmental Update

• HTA Cruise Impact Study
• Ballot Measure 2 (2006)
• Port Development
  – Ketchikan
  – Juneau
- Port Development
- Relocation of Terminal 30 to Terminal 91
- Environmental
  - NW Ports Clean Air Strategy
  - MOU
  - Bio-Mass / Ballast Water
Victoria
Prince Rupert
• 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