



**NORTH WEST  
CRUISESHIP  
ASSOCIATION**

# **AAPA Cruise Seminar**

## **“Policy Issues And Cruise Ports”**

**February 8, 2006**





# The History of NWCA

- Established in 1986, initially for the purpose of providing security screening services to the member lines.



# The Role of NWCA

- Security screening in Port of Vancouver
- Communications
- Government Relations
- Research – polling/economic impact studies
- Port project planning



# Market Overview 2005

- **Alaska** - 27 NWCA member line ships visit  
- 920,000 cruise guests  
*Source: Cruise Line Agencies of Alaska*
- **Vancouver** - 17 NWCA member line ships homeport  
- 910,000 total revenue passengers  
*Source: Vancouver Port Authority*
- **Seattle** - 9 NWCA member line ships homeport  
- 687,000 total revenue passengers  
*Source: Port of Seattle*
- **San Francisco** - 1 NWCA member line ship homeports  
- 212,000 total revenue passengers  
*Source: Port of San Francisco*
- **Hawaii** - 16 NWCA member line ships visit/homeport  
- 316,000 cruise guests  
*Source: HI Dept. of Business, Economic Dev. & Tourism*



# Common Themes

- Safety and security
- Capacity constraints
- Environmental protection



# Safety and Security

- Implementation of ISPS
- Security zones
- Background security checks
- Costs





# Capacity Constraints

- Berth availability
- Terminal capacity
- Access and congestion
- Planning timelines
- Financing



# Environmental Protection

- Protection regimes/jurisdictions
- Consistency
- Public perception
- Legislative pressures
- Contractual (MOUs) or legislation
- Air emissions



# Alaska

- Port development
- Legislative agenda
- Environmental performance
- Ballot initiative # 3



# KETCHIKAN DAILY NEWS

KETCHIKAN, ALASKA

VOL. 78 NO. 14 (USPS 293-940)

20 PAGES

WEDNESDAY, JAN. 18, 2006

75 CENTS

## Council OKs new cruise dock memorandum

By SCOTT BOWLEN  
Daily News Staff Writer  
The Ketchikan City Council on Tuesday approved a memorandum for further negotiations with the cruise industry to design and build a new cruise dock and related improvements.

Now that the council has approved the 14-page memorandum, the city and Survey Point Holdings will start negotiations toward developing a definitive agreement by March 1. In general, the memorandum indicates that Survey Point Holdings and as-yet-unnamed cruise industry partners would form a new company, Ketchikan Dock Co., to design and build the new Berth IV dock and related improvements.

The memorandum also references the city's ongoing work toward a project to expand existing Berth II so that three 1,000-foot ships can be accommodated downtown at once. The city's goal is to complete that project — which would include an ground transportation area, a waterfront promenade and a reconfigured Casey Moran Pier — in time for the 2007 cruise ship season also.

The City Council approved one change in the memorandum Tuesday, voting 6-0 to delete any references to the eminent domain by the city.

City Mayor Bob Weinstone said several people had expressed concern about the eminent domain issue, and that the city and Survey Point had agreed to not

About 30 people at Council's special Tuesday, but only a few comment period. Len Laurance, with various say industry, spoke noting that 2006 Ketchikan business expected to be here this year. He added that the city is looking for the

## Tough issues await '06 Legislature

**SURPLUS:** Wild spending, saving, road priorities, gas line complicate election year.

By MATT VOLZ  
The Associated Press

Published: January 8, 2006  
Last Modified: January 8, 2006 at 05:16 AM

## Cruise ship tax headed for '06 ballot

Measure institutes \$50 head tax plus 33 percent tax on onboard gambling

By TIMOTHY INKLEBARGER  
JUNEAU EMPIRE

A citizen's initiative to tax the cruise ship industry and enforce stricter environmental standards has been approved by Lt. Gov. Loren Lemmon for the August 2006 primary.

The initiative would institute a \$50 head tax and a 33 percent tax on onboard gambling revenue, and would subject the industry to Alaska's corporate income tax.

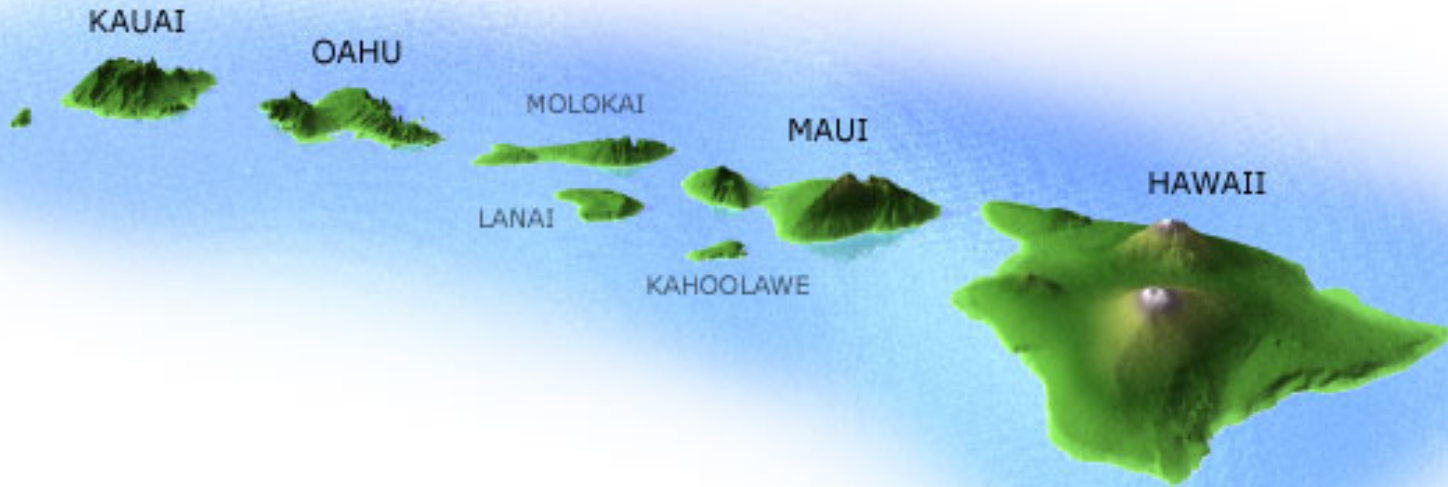
It also increases fines for illegally dumping waste from \$500 to \$5,000 and requires cruise ships to hire marine engineers to monitor wastewater treatment and pollution control equipment.

onal Chinese calendar, Dog. But in Alaska, e year of living

. Beth Kerttula, D-Juneau,

ear, everybody's running a lot of money, we've got we've got the gas line,"

# The Islands of Hawaii



# Hawaii

- Port development
- Legislative agenda
- Environmental debate (MOU vs. legislation)



# The Maui News

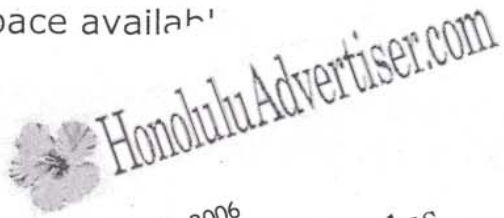
Maui's Newspaper  
Since 1900

## Ships jam harbor; winds disrupt schedule

By VALERIE MONSON, Staff Writer

KAHULUI – Kahului Harbor was stuffed to full space at such a premium that two hours for the last parking space available.

"We are swamped to coordinate it."



Posted at 11:47 a.m., Wednesday, January 18, 2006

### Legislature opens with eye on state surplus

Opening day speeches:

- House Speaker Calvin Say
- Senate President Robert Bunda
- Senate Minority Leader Fred H

Advertiser Staff

With a rare chance to work with a S the state Capitol with calls to invest energy.

## Cruise industry, state need solid agreement

Honolulu Advertiser

Tuesday, Nov 22 2005

### Staff Report

This might be a case of being careful what you wish for: Environmentalists and some state lawmakers have pressed for years for a specific state law that would control the environmental practices of our new cruise ship industry.

# Washington State

- Air emissions
- MOU or legislation





# British Columbia

- Port Gateway projects – Vancouver and Prince Rupert
- Easing the border crossing (“US Direct” program)
- Air emissions inventory
- Cruise port investment – Campbell River



## Gateway the 'key to B.C. prosperity'

But critics want government to release studies of project it claims will relieve traffic congestion

William Boei and Scott Simpson, With Files From Jonathan Fowlie

Vancouver Sun

Wednesday, February 01, 2006

The business community loved the Gate  
bridge-building megaproject unveiled T  
critics said the government has not pr  
will ease gridlock in Greater Vancouv

Campbell released an outline of the  
and said it will create thousands o'

## Port of Vancouver Launches "U.S. Direct" Program for American Cruise Ship Passengers

Canada NewsWire - Vancouver, April 22, 2005: In an effort to increase business and maintain a leadership position in the Alaska cruise market, the Vancouver Port Authority (YVR), in partnership with the Vancouver International Airport Authority (YVR), has launched a new "U.S. Direct" strategic initiative for the start of the 2005 cruise season. The initiative streamlines passenger processing and improves transit times through Vancouver.

## The Globe and Mail

# Prince Rupert port plan is given the green light

By MARK HUME

Wednesday, January 25, 2006, Page S1

VANCOUVER -- A \$160-million port expansion that is seen as an economic engine for Canada's northwest coast has been approved by the federal government and construction is to start immediately, despite threatened court action by the Coast Tsimshian.

# Canada

## New Administration in Ottawa

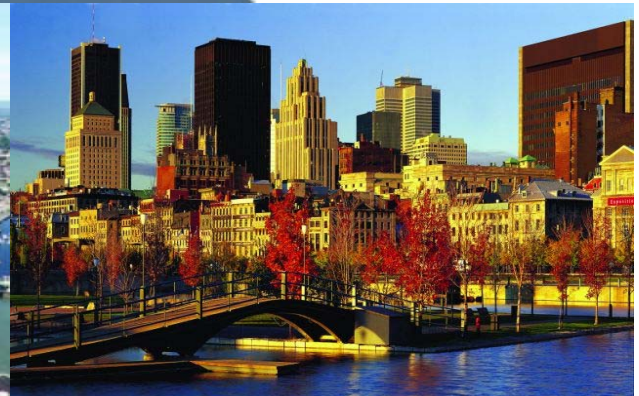
- Conservative government (after 12 years of Liberal rule)
- “Minority” government in House of Commons
- Liberal Senate



# Canada

## Priorities

- Accountability in government
- Sales tax reduction
- Child care program
- Health care
- Security (national defense/crime)



# Canada

## Expect:

- High quality environmental protection
- Smoother trade relations
- Ports/airport infrastructure





**NORTH WEST**  

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**ASSOCIATION**