

ALASKA CRUISE

PNWER Tourism Plenary



GREATER
**VICTORIA
HARBOUR**
AUTHORITY



GREATER VICTORIA HARBOUR AUTHORITY PROPERTIES

— Property Boundary
 - - - Lease areas



- *a working Harbour* where people live, learn, work, and play; a spectacular gateway into Victoria's past and into its future, with a vibrant look and feel, linking communities and all people together.

- *a GVHA organization* that is recognized by the community as an effective marine asset manager, and as a trusted advocate and partner, working for the common good of the Harbour and the Region

VISION



GVHA Guiding Principles

First Nations
Relationship

Financial Self-
Sustainability

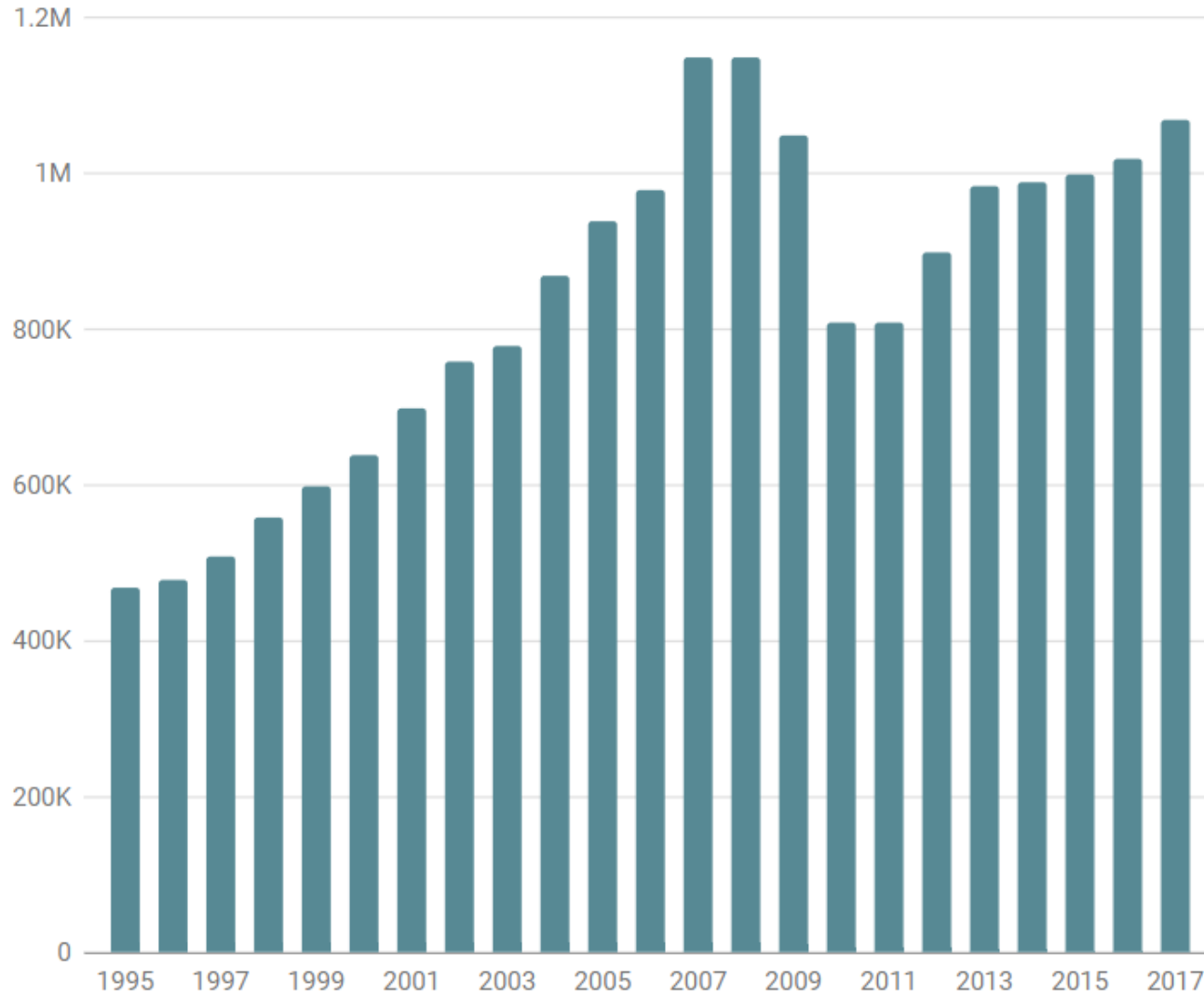
Accountability

Triple Bottom
Line

Working
Harbour

Alaska Cruise Industry Trends

Number of Alaska passengers rebounds



New Market Entrants:

2018

- Windstar

2019

- Viking Cruises
- Azamara
- Hurtigruten
- Cunard

2020

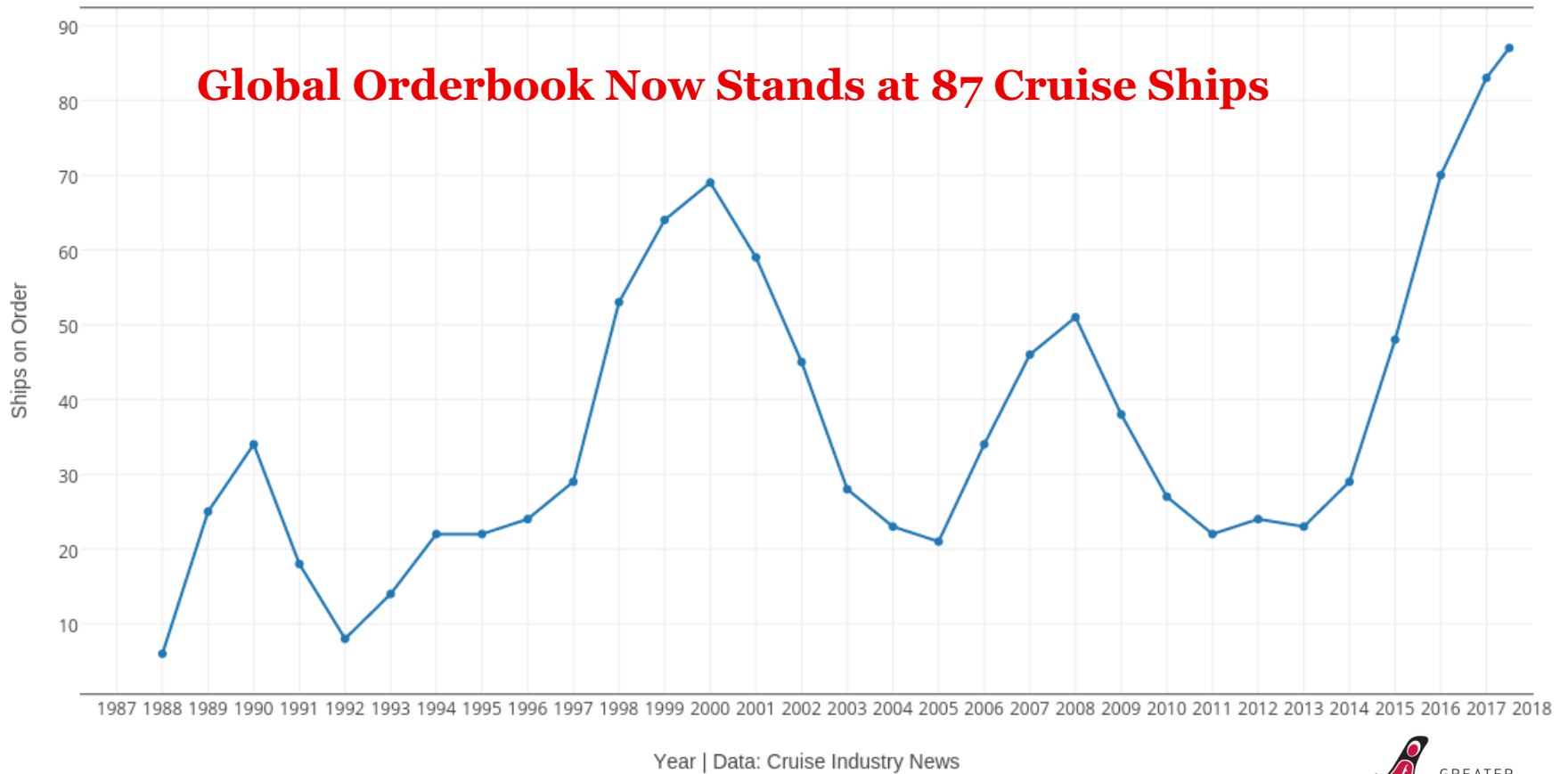
- MSC

Plus larger and more vessels from current brands



Cruise Industry Worldwide

Cruise Ships On Order | Cruise Industry News



Economic Value of Cruise in BC

REGIONAL OVERVIEW

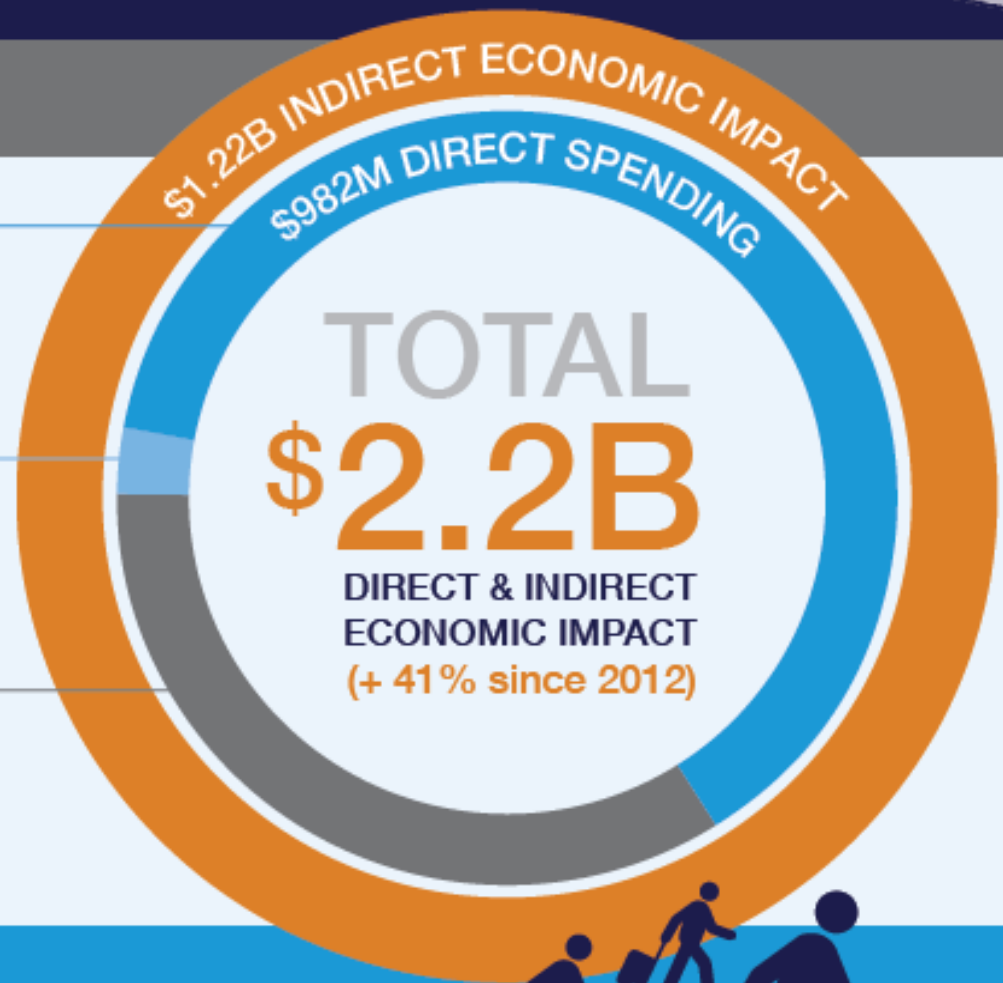


2016
CRUISE
INDUSTRY
SPENDING

CRUISE LINES
\$593M
(+ 38% since 2012)

CREW
\$30M
(+ 25% since 2012)

PASSENGERS
\$359M
(+ 7% since 2012)



1.4M TOTAL
PASSENGER TRAFFIC
(+ 19% since 2012)



Local Economic Impact to Seattle

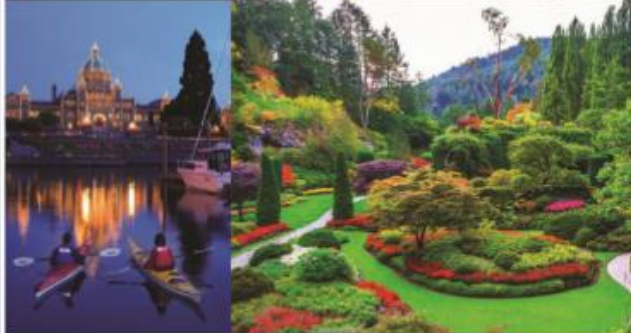
- \$501 million – annual business revenue
- 4,029 jobs
- \$18.9 million – annual state and local taxes

Each vessel call contributes \$2.7 million to the economy

Seattle

Recognized as the Best North American Homeport by *Cruise Critic* 2016

- Established homeport with two large passenger terminals and three deep water berths
- Shorepower connections available (LNG bunkering in early development)
- Convenient onsite parking, luggage storage, rental car kiosk and concierge
- World Wide Air Connections to SeaTac Airport, a Port of Seattle facility
- Airline check-in and baggage transfer onboard the ship
- Seattle, home of Microsoft, Amazon and Boeing—offers world class attractions and excursions that will exceed your guest's expectations
- Seattle is a proven vacation destination the ideal starting point for an Alaska cruise



Victoria

Canada's Busiest Cruise Port of Call

- 3 deep water berths (two berths able to accommodate up to 360m length by 2019)
- 2017 season served 241 ship calls and 560,000+ in-transit cruise guests
- Bunkering and provisioning available (LNG in early development)
- Marine industrial infrastructure for maintenance work
- Established tour and ground transportation providers for cruise
- World-class attractions including the Butchart Gardens
- City center walkable distance from cruise ship pier
- Victoria was chosen one of the top 10 cities in the world in 2016 by Condé Nast Traveler Magazine
- Delivers a profitable and highly rated guest experience every time





CRUISE CRITIC
SEATTLE
BEST NORTH AMERICAN
HOMEPORT



Potential New Itineraries

- 3 and 4 day Pacific Northwest Itineraries
- Opportunity to explore as Alaska ports become more congested
- Potential ports-of-call
 - Victoria
 - Seattle
 - Nanaimo
 - Astoria
 - Vancouver
- Opportunity to originate from Victoria as berth space is available during optimal turn days (Fri-Sun)

A Word About Pre-Clearance

- Vancouver Island is unique in that it is emerging as a marine/air gateway
- Absolutely critical for new and emerging home-ports such as Victoria
- Opportunity to build on resources required at Belleville Terminal (less than .6 kilometre/1 mile away)
- Ogden Point could serve as a pilot project/location for enhanced screening

Ogden Point Master Plan



Ogden Point Master Plan

- Plan for economic, environmental and social sustainability
- Maintains and enhances marine industrial usage
- Adds commercial / retail / industrial land uses to ensure long-term financial sustainability for GVHA
- The plan could add approximately 400,000 square feet of gross retail / institutional space
- Celebrates and strengthens First Nations presence, partnership and culture



Thank You!
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