



Victoria Passenger Movement

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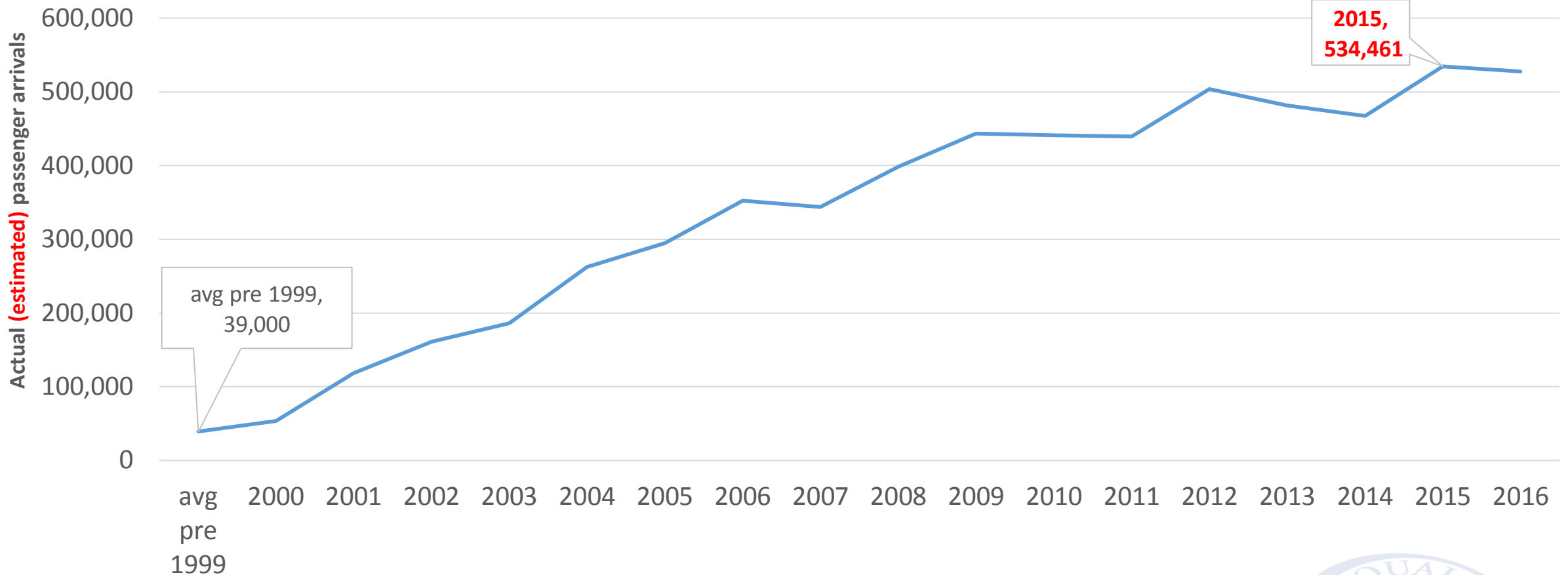
CLIA-NWC & Victoria Stakeholder's Roundtable - Friday, February 27th, 2015
Sammanish Room, Willow's Lodge, Woodinville, Washington



Overview

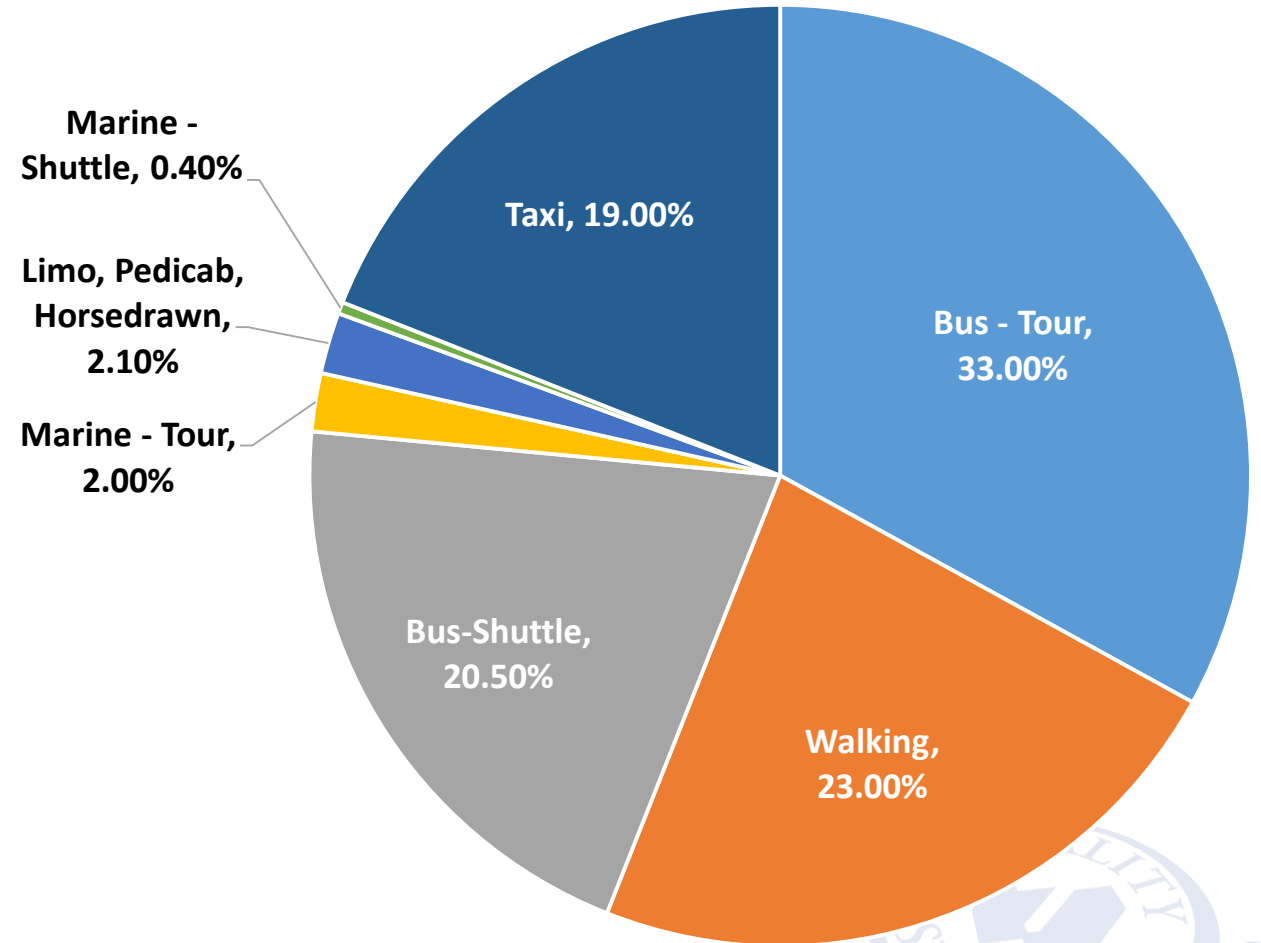
- Historic Passenger Traffic
- Passenger movement by mode
- Bus transportation
 - Fleet size required
 - Fleet age review
 - Challenges
 - Economics
- Passenger Arrival Experience
- Future capacity
- Positive Outcomes – Next Steps

Historic Passenger Traffic



Passenger Movement by Mode

- 86% guests ashore = 398k passengers
- Taxi: counts estimated on 2 passengers per taxi
- Walking: 1 in 4 guests walk off the terminal
- Shuttle bus: Combined private and GVHA service numbers
- Cruise line tour passengers comprised of “bus – tour”, “horse-drawn” and “marine – tour”.
- Peak bus traffic as high as 65% of total traffic in June





Bus Transportation - Fleet

Passenger volumes in 2014-15 cruise season average week

Day	Ship	Pax	Time in Port	Pax/ day	Tour buses	Shuttle Buses
Sunday	STATENDAM	1,260	10:00	1,260	13	3-6
Monday	GOLDEN PRINCESS	2,636	7:00	4,760*	26*	3-6
	CARNIVAL LEGEND	2,124	4:29			
Thursday	JEWEL OF THE SEAS	2,500	9:00	5,350*	29*	3-6
	CELEBRITY SOLSTICE	2,850	5:59			
Friday	NORWEGIAN JEWEL	2,376	7:00	7,296	52	6-9
	WESTERDAM	1,840	5:59			
	CROWN PRINCESS	3,080	4:59			
Saturday	NORWEGIAN PEARL	2,394	5:59	6,854	52	6-9
	AMSTERDAM	1,380	5:59			
	RUBY PRINCESS	3,080	4:59			



Bus Transportation – Fleet Age

- 50% are older than 1990
- Vast majority of fleet are MC-9's
- Several newer buses 80 pax double-deckers
- Data from 2013 survey – some newer buses being added
- Vehicle age often confused with engine age

age range	#	%	age
Less than 1980	7	10%	Over 35 yrs old
1981-1990	29	40%	up to 35
1991-2000	16	22%	up to 25
2001-2010	20	27%	up to 15
2011 and newer	1	1%	up to 5 yrs
total	73		

2013 data – numbers may differ from current fleets



Bus Transportation - Challenges

- **Emissions:** community concerns extend to ground level emissions
- **Noise:** highway coaches branded by community as worst noise polluters
- **Optics:** 30 yr old highway coaches typical of product provided
- **Volume:** passenger volumes increased over 13 times since 2000
- **Capacity:** current fleet only accommodates existing traffic, will need investment /sub contractors for larger capacity

Bus Transportation - Economics

- **Short season:** 5 month season
- **Access:** Island location expensive to move buses on/off – limits alternate use to depreciate assets.
- **Peak demand:** 1 night a week bus demand doubles
- **Short utilization period:** average ship call of 7 hours allows for one tour, avg tour 3 hours
- **Rates:** as low as \$79 per hour incl bus, driver/guide, fuel, insurance (compare limo \$87 / hr, PTB requirement)
- **Workforce challenge:** peak demand hard to retain trained staff on part-time employment

Ships arriving simultaneously	Days each week this occurs	Max # tour buses required
1 ship	1	13
2 ships	3	29*
3 ships	1	52

Passenger Arrival Experience

- **Victoria first impression** – aging bus fleet (median bus age is 1985)
- **Blue smoke** (steam) and oil stains common in parking lot
- **Customer experience** -Long dwell times in vehicles – times between stops up to 45 minutes, not your typical hop-on, hop off
- At \$79 / hr, hard to justify expense of a new bus



Future Capacity

- Current market conditions indicate larger ships will be coming to Alaska
- Saturday highest demand day for berthage
- Potential up to 10,600 pax (current 7,300)

Result:

a potential 40-45% increase in capacity one day a week, starting in 2017



Bus Transportation

Positive outcomes – next steps

- **Precedent – GVHA speeding program**
 - Implemented 2012 – community complaints of speeding taxis
 - Speed traps and reader boards implemented
 - 2014 – no taxis speeding in community (locals speeding)
- **GVHA, Western and local industry are ready to collaborate to find solutions**

Next steps

- Work with industry to set bus rates that can support fleet investment and renewal
- Manage community expectations around emissions and noise
- Start preparation for 2017 traffic volumes now