

Future Borders Coalition, Vancouver Air-Cruise Meeting, June 2023

Meeting Summary Notes

Section 1) Key Data Points on Vancouver-Alaska Cruise Operations¹

- Vancouver is Canada's largest and most complex port, aiming to be the most sustainable port in the world. Canada Place Cruise Terminal (point of cruise embarkation/disembarkation) is limited in its physical space to expand; tides and resourcing constraints also limit expansion.
- Canada Place has been the home port for Alaska operations for 50 years.
- Alaska cruise season is April to October

Scope and Economic Impact

- In 2019, Vancouver-Alaska cruises included 1.07 million passengers and 288 vessels.
- 2023 estimates are 1.3 million passengers and 334 vessels.
- Direct and indirect economic impact on the Vancouver region from cruises is \$2.1 billion annually, a 35% increase since 2015
- Regional employment: 13900 jobs, direct and indirect
- Regional expenditure per vessel: \$3.2 million.
- Regional expenditure per passenger, around \$400.

Cruise passenger demographics

- 65-70% of passengers are from the US.
- 20-25% are from other elsewhere in the world
- 10-15% are from Canada
- 70% are over 55 years of age
- 65% are women

Travel preferences and local tourism

- 74% of all passengers stay in British Columbia about 3.8 days either before or after the vessels.
- 75 percent of passengers travel to/from Vancouver by air to YVR; rail and motorcoach are next most common; followed by vehicle. (Some percentage of surface passengers have flown to Seattle first).
- More than 80% of US passengers arrive/depart by air.

Use of travel modernization technology

- 71 percent of passengers surveyed are interested in onboard airline check-in programs that include luggage tags to the final destination.
- 65 percent are interested in mobile apps for passport control

¹ Source: Vancouver Fraser Port Authority and Passenger Surveys, 2022-2023

Section 2) Discussion and Stakeholder Input

The cruise industry in Vancouver has seen growth over the years, with increasing passenger numbers and vessel calls. However, this growth presents challenges, as the terminal's capacity is reaching its limits. The Port of Vancouver is exploring options for a new cruise facility in the Lower Mainland.

The economic impact of the cruise industry in Vancouver is substantial, generating billions of dollars and supporting thousands of jobs. Most passengers spend additional time in Vancouver before or after their cruise, benefiting local businesses. Enhancing the process of passenger flow between the airport and the cruise terminal can further promote economic growth.

The majority of cruise passengers are from the United States, followed by Canadian and international travelers. The demographic skews towards older adults, with a significant percentage over the age of 55. Improving accessibility and ease of travel for this demographic is a priority.

Passengers primarily arrive at the cruise terminal by air, and a significant portion of them also depart by air after the cruise. Vancouver International Airport (YVR) serves as the primary connecting point for passengers, with some also using Sea-Tac airport. Enhancing the connection process between YVR and the cruise terminal is crucial to improving the overall travel experience.

The percentage of passengers arriving on the day of departure is not specified, but it is presumed to be high. Most passengers prebook transfers organized by the cruise lines. Recent airline delays are leading passengers to arrive a day or two earlier.

Efforts are being made to minimize the number of times bags are handled throughout the journey. The current process involves multiple touchpoints, including onboard collection, transfer within the terminal, and loading onto buses. Simplifying this process and offering services like onboard airline checking with baggage tags to the final destination can significantly enhance passenger convenience.

Coordination between various stakeholders, including the cruise line, airport authorities, and customs agencies, is vital to ensure a seamless travel experience. Limited space resources and other constraints, such as tidal considerations for vessel operations, add to the complexity of the process.

Some 67% of the travelers at the Vancouver cruise terminal are from the United States. Passengers arriving from the US often arrive early and wait with their bags at the terminal. (There is a small area for luggage storage, but it is not suitable for large-scale storage.)

A significant percentage of passengers arriving from the U.S. stay in Vancouver for an average of 3.8 days before or after the cruise. The ideal scenario is for travelers to not handle their own bags when connecting to another mode of transportation.

Streamlining passenger processing and reducing multiple touchpoints for baggage handling increases security and integrity.

Efforts are being made to modernize traveler processing at CBSA, including the use of the ArriveCAN platform for digital travel experiences. CBSA is exploring the feasibility of collecting advanced passenger information and air exit information for general aviation. The collaboration between CBSA and industry partners aims to embed ArriveCAN in check-in processes for air and cruise travel.

Approximately 20 percent of cruise passengers cross into the United States at land borders. There is a need for more coordination with land borders to avoid bottlenecks. Information sharing/ advanced passenger information, should be routine and easy.

Staffing levels at border crossings affect customs organizations' ability to handle traveller demand.

From a traveler's perspective, it is crucial to have a comprehensive view of their journey. The ability to track bags and ensure their safe return is of utmost importance. This is where the collaboration between organizations like CBSA and CBP becomes crucial. By coordinating and sharing information, it is possible to enhance the overall travel experience and address any exceptional situations that may arise during the journey.

Traveler bags and passengers arriving at both the Vancouver Canada Place cruise terminal and YVR airport face a process that must be streamlined. The Port of Vancouver aims to improve operations and enhance the passenger experience. Vancouver is Canada's largest port and a significant hub for cruise operations. Canada Place serves as the main cruise terminal, accommodating numerous vessels, including those bound for Alaska through the Inside Passage.

Section 3) Focus Areas -- Baggage, Borders, and Technology

Challenge The current baggage handling process for cruise passengers moving between YVR and the Canada Place cruise terminal poses several challenges:

1. Inconvenience for Passengers: Passengers are required to retrieve their own bags before boarding the ship or plane, which can be cumbersome and time-consuming, especially for elderly or mobility-impaired travelers.

2. Limited Exploration Time: Passengers must spend hours at the airport or cruise terminal watching their bags instead of exploring the region, limiting their ability to engage in local activities and spend money on tourism-related businesses.
3. Congestion and Confusion: The spaces designated for retrieving bags can become congested and confusing, leading to frustration for passengers. Porters and ground handlers are available, but many passengers rely on companions or cruise line representatives for assistance.
4. Security Concerns: Multiple touchpoints in the baggage handling process, including onboard collection, transfer within the terminal, and loading onto buses, raise security concerns and increase the risk of mishandling or loss of baggage.
5. Revenue Loss: Passengers with extra time before their flight or ship leaves find it challenging to leave the terminal due to the need to stay with their bags. This results in lost opportunities for local businesses to generate revenue from these passengers.

Recommendations re: Baggage

1. Seamless Baggage Transfer: Implement a system where passengers do not need to handle their bags at multiple touchpoints. Instead, bags can be handed off to cruise line representatives who transport them to the pier independently. This would eliminate the need for passengers to retrieve and handle their bags, enhancing convenience and streamlining the process.
2. Digital Tracking for Luggage: Introduce a digital tracking system for luggage that allows passengers to monitor the progress of their bags throughout the entire journey, from the cruise ship to the airline and beyond. This technology can provide peace of mind to passengers and improve customer satisfaction. Additionally, consider integrating technology to enhance communication between passengers and cruise line representatives regarding baggage handling.
3. Secure Baggage Corridor: Establish a secure corridor for baggage handling that minimizes the risk of mishandling and enhances security throughout the process.
4. Coordination with Partners: Collaborate closely with cruise lines, airlines, airport authorities, and ground handlers to ensure smooth baggage transfers and streamline the overall process.
6. Enhance Baggage Storage: Improve and expand baggage storage options at the terminal to accommodate passengers who arrive early and need a place to store their bags while exploring the region.

Challenge: Cross-Border Movement

The management of borders and customs for cruise passengers faces several challenges:

1. **Inefficient Passenger Processing:** The current customs clearance process for cruise passengers can be time-consuming and cumbersome, leading to delays and long wait times, especially during peak travel periods.
2. **Coordination Challenges:** Coordinating customs procedures between different modes of transportation (air, marine, land) and various government agencies (CBSA and CBP) can lead to confusion and inefficiencies.
3. **Complex Crossings:** Approximately 20 percent of cruise passengers cross at land borders, posing challenges in terms of information sharing, passenger identity verification, and potential bottlenecks.
4. **Passenger Confusion:** The presence of both CBSA and CBP within a short timeframe can create confusion for travelers, particularly regarding customs processes and documentation requirements.
5. **Complex International Arrivals:** Currently, passengers arriving in Alaska from Vancouver are treated as international arrivals, which can lead to complications and extra steps in the customs process.

Recommendations re: Cross-Border Movement

1. **Pre-Clearance and Digital Processing:** Implement pre-clearance services, where possible, to expedite customs procedures. Utilize digital platforms like the ArriveCAN system for travelers to submit information in advance, allowing for faster processing and early customs declarations.
2. **Expanded Use of ArriveCAN:** Explore expanding the use of the ArriveCAN platform to include marine mode/cruising, enabling travelers to complete customs declarations and entry/exit data sharing digitally for different modes of transportation.
3. **Enhanced Information Sharing:** Establish routine and easy information sharing between customs agencies (CBSA and CBP) and other stakeholders to facilitate seamless passenger processing and reduce bottlenecks at land borders.
4. **Full Preclearance:** Work towards achieving full preclearance in Vancouver, so passengers arriving in Alaska from Vancouver are treated as domestic arrivals, eliminating an additional level of complexity.
5. **Streamlined Biometric Solutions:** Continue the adoption of biometric solutions and mobile passport control to enhance identity confirmation and streamline passenger processing.
6. **Collaboration and Communication:** Foster collaboration and communication between CBSA, CBP, cruise lines, and other relevant entities to ensure a coordinated and efficient customs clearance process.

7. Staffing and Resources: Address staffing levels at border crossings to effectively handle traveler demand, minimizing wait times and ensuring smooth customs processing.

Challenge: Use of Technology

Technology provides excellent tools to expedite the travel process for cruise passengers but it also presents several challenges:

1. App Fatigue: Passengers may be overwhelmed by the need to use multiple separate apps for different aspects of their journey, leading to confusion and a less seamless experience.

2. Lack of Centralized Information: Passengers may struggle to access relevant information from various sources, such as airlines, cruise lines, and customs agencies, making it difficult to stay informed and plan their journey effectively.

3. Limited Adoption: Some passengers, particularly older adults or those less familiar with technology, may find it challenging to use digital tools, reducing the effectiveness of technological solutions.

4. Privacy and Security Concerns: The use of personal data for digital processing and tracking may raise privacy and security concerns among passengers.

Recommendations re: Technology

1. Centralized Dashboard: Develop a centralized dashboard provided by relevant entities (cruise lines, airlines, airport authorities) that integrates various apps and services, offering passengers a single location to access all necessary information and tools.

2. Streamlined App Integration: Collaborate with different stakeholders to streamline the integration of various apps and services into the centralized dashboard, reducing the need for passengers to use multiple apps.

3. User-Friendly Interface: Design the centralized dashboard with a user-friendly interface that is intuitive and easy to navigate, catering to passengers of all ages and levels of technological proficiency.

4. Accessibility Features: Ensure the dashboard includes accessibility features, such as larger font sizes and voice-guided navigation, to accommodate passengers with different needs.

5. Transparent Data Handling: Clearly communicate how passenger data will be used, stored, and protected, addressing privacy and security concerns and building trust among travelers.

6. Digital Travel Credentials: Promote the use of digital travel credentials, such as the ICAO digital passport, to simplify pre-processing and data sharing between stakeholders.

Section 4) Other Recommendations and Observations

1. Sealed buses at crossing land borders to make air to cruise transfers;
2. Manifests and information sharing: The exchange of manifests and information between cruise lines, airlines, and CBP to enhance the traveler experience and facilitate smooth processing.
3. Baggage processing and secure corridor: FBC working collaboratively on ideas for efficient baggage handling, including printing bag tags on the cruise ship, transferring bags directly to the airport, and ensuring a secure corridor for bag transportation.
4. Baggage security: Management of baggage recall processes for higher risk travellers; screening for radiation and hazardous substances.
5. Regulatory compliance: New actions must comply with existing national and sub-national regulations such as admissibility determinations, advanced passenger information, and baggage screening.
6. Terminal operations: Challenges of terminal operations, the need for space optimization, and the potential for a smoother passenger movement through the terminal.
7. Collaboration and assistance: Willingness to collaborate and assist in improving processes and efficiency for travelers crossing the border.
8. Encourage use of digital technologies and expansion of ArriveCAN and US Mobile Passport Control from air to other modes.
9. Encourage evolution of CBP at Canada Place from pre-inspection to full preclearance
10. Sharing of advanced passenger information from cruise to land or air to land to speed up land port passage.
11. Ideal end state: Full information sharing across modes and authorities; Checked once, cleared twice between CBP and CBSA.

Section 5) Concluding Themes

Interoperability Among Stakeholders

The key is to focus on interoperability and collaboration among stakeholders rather than proprietary solutions. Instead of one organization owning the entire traveler's journey, it is important to establish effective communication and connectivity between different entities. By adopting this approach, travelers can benefit from a well-connected system where information can be shared and processed seamlessly. This requires extensive discussions and cooperation to align the various aspects of the border and passenger journeys.

Eliminating Congestion

Implementing the proposed solutions would result in significant benefits for all parties involved. Not only would it enhance the travel experience for passengers, but it would also alleviate congestion at Canada Place and provide more opportunities for revenue generation. Moreover, exploring these innovations would position Vancouver as a desirable destination, attracting more visitors and contributing to its overall growth.

Innovation and Improvement

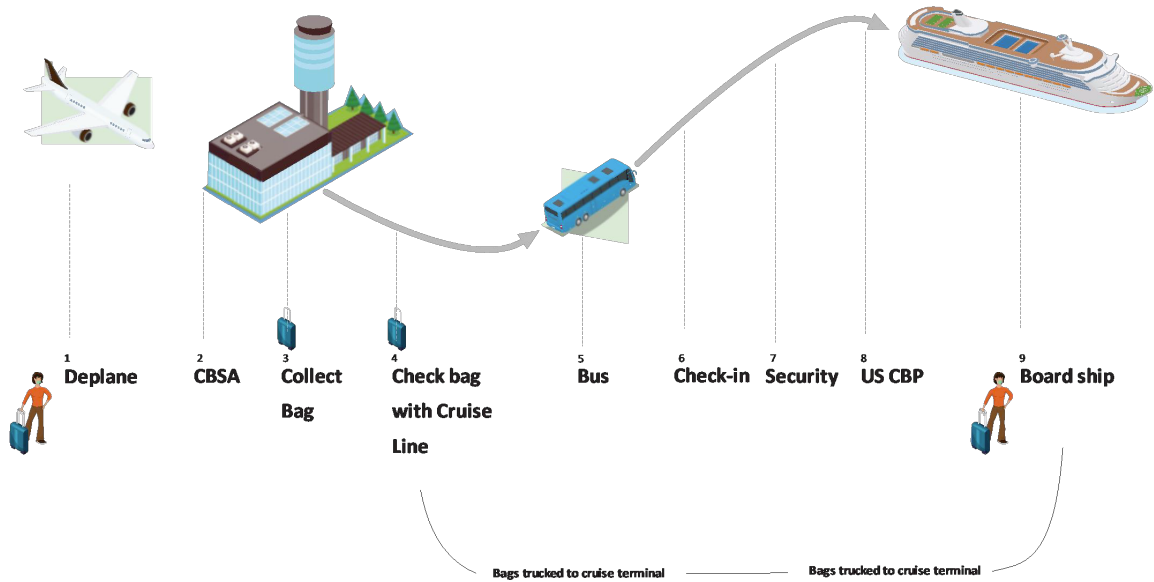
Cruise travellers tend to be low-risk travellers and cruising is seasonal. This presents the ideal opportunity to experiment and innovate with new modernization proposals. Also, cruise passengers provide significant spending in the region and could be encouraged to spend more. This increases the incentive to invest in innovation and improvement. The ability to reset and experiment each season allows for the testing of new ideas and the optimization of operations. By continuously seeking improvement and trying different approaches, Vancouver can lead the way in creating a seamless and efficient intermodal travel experience that caters to various types of travelers and journeys.

See infographic proposals for streamlining Air-Cruise and Cruise-Air on following pages.

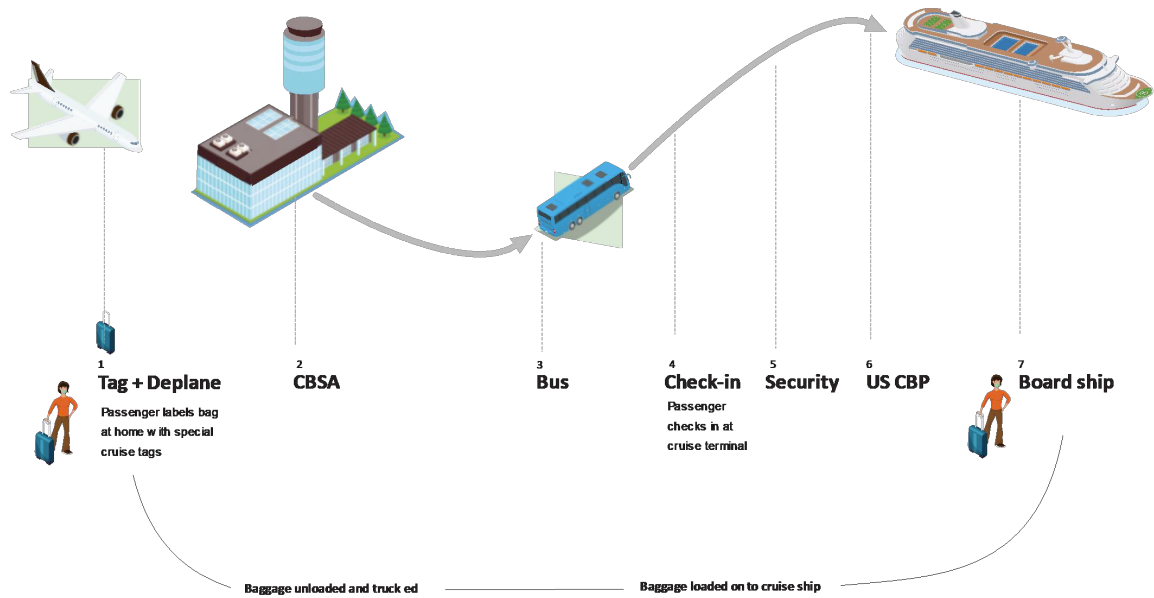
Section 6)

Passenger Journey Maps – Towards a New Way of Doing Things

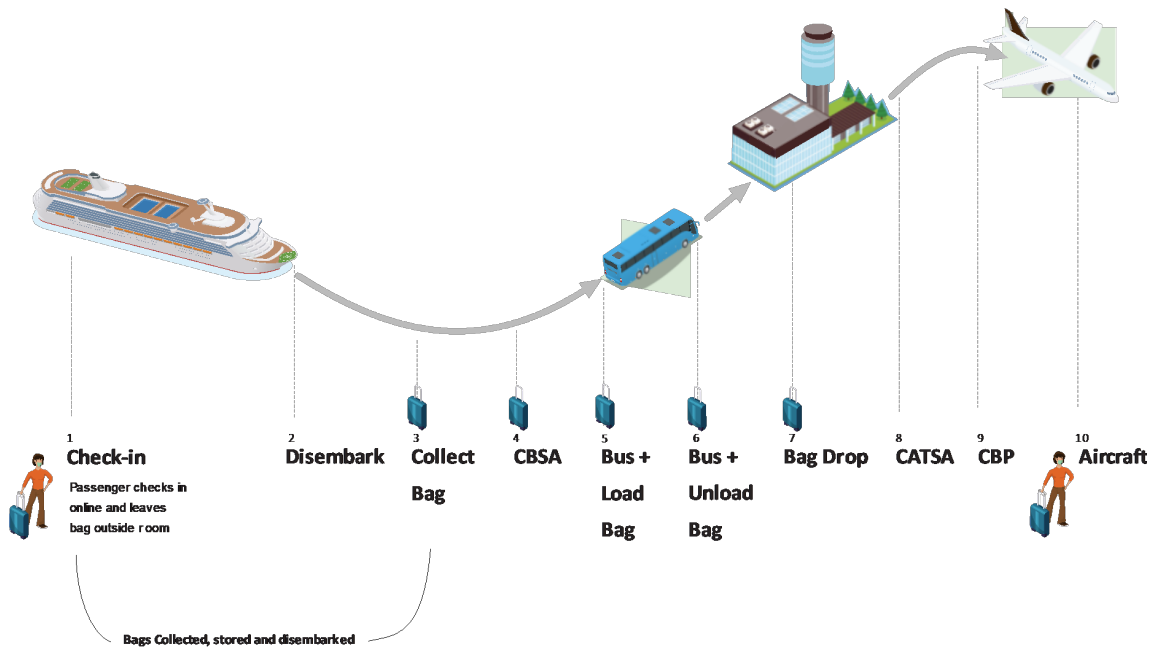
Current Process – Aircraft to Ship



Proposed Process Aircraft to Ship



Ship to Aircraft – Current Process



Ship to Aircraft – Proposed Process

