



**FUTURE BORDERS**  
**COALITION**

## Passenger Journey Roundtables



Thanks to our  
Sponsors



# Agenda

- 8:30 Welcoming Remarks
- 9:00 Passenger Journey 1: Air-Cruise Multi-Modal Transfer
- 10:45 Break
- 11:00 U.S. Consul General Brent Hardt
- 11:10 Passenger Journey 2: World Cup 2026
  
- 12:30 Lunch
- 13:30 FBC Annual General Meeting

# **Enhancing the Cruise Passenger & Baggage Intermodal Connection Process**

**Presentation to Future Borders Coalition**

**22 June 2023**

## OUR GOAL TODAY

To brainstorm opportunities to streamline the intermodal process for passengers and baggage connecting between the cruise terminal at the Port of Vancouver and Vancouver Airport.

The end goal is that the solution will work for other operations subject to safety and security risk assessments.

# Agenda

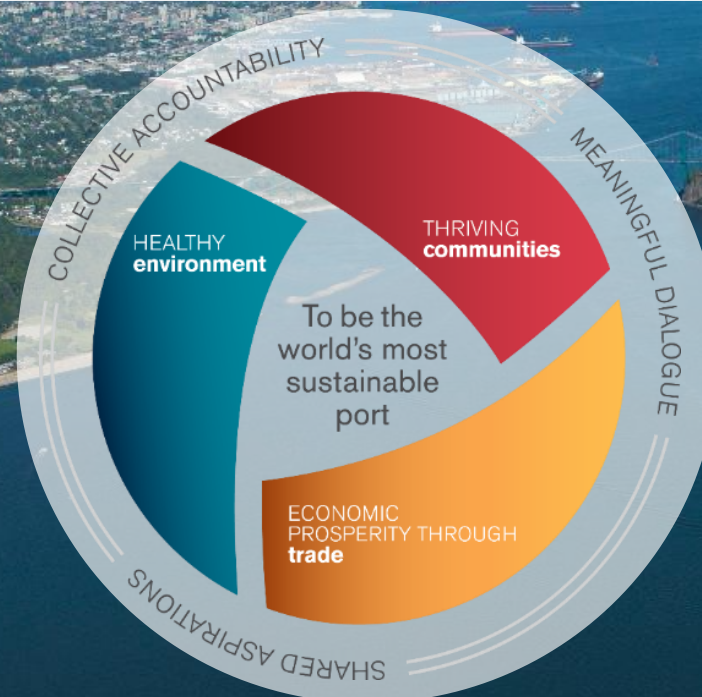
- Overview of What's Happening at the Port of Vancouver
- Introductions of panelists
- Passenger and Baggage Flow
  - Current operation
  - Potential long-term opportunities to improve the experience for passengers.
- Next Steps and Closing Remarks

# Panelists

- Greg Rogge, Director, Land Operations, VFPA
- Mandy Chan, Manager, Cruise Services, VFPA
- Chris Thureau, Director, Facilitation & Passenger Programs, YVR
- Sharon Spicer, Director General, Travellers Operational Guidance and Support Travellers Branch, CBSA
- Josh Nutzhorn, Area Port Director, Vancouver Preclearance, CBP

# Vancouver Fraser Port Authority: Mission and Vision

Our mission is to enable Canada's trade objectives, ensuring safety, environmental protection and consideration for local communities





# Overview of Vancouver's Cruise Business and Volumes

- Seasonal homeport for the Vancouver-Alaska Cruise April to October

YEAR	PASSENGERS	VESSELS
2018	895,400	241
2019	1.07M	288
2020	-	-
2021	-	-
2022	815K	307
2023	1.3M*	334*
2024	TBD	348*

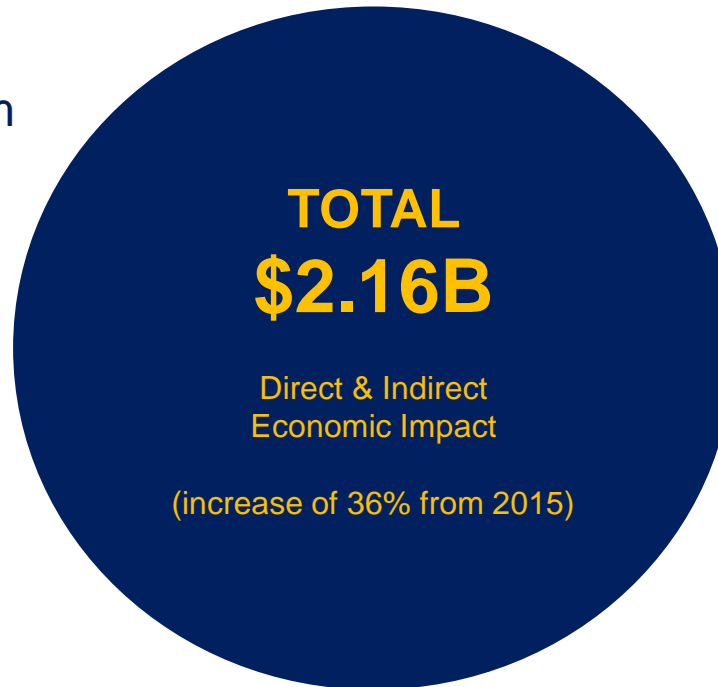
\* Forecast

# Vancouver's Direct and Indirect Economic Impact

Direct Cruise-related  
Expenditure:  
**\$1.1 B**  
(increase of 41% from  
2015)

Per Vessel Call  
Direct Expenditure:  
**\$3.2 M**  
(increase of 16% from 2015)

Per Passenger  
Trip Expenditure  
(w/o airfare):  
**\$398**  
(increase of 25% from 2015)



Total Jobs Generated  
(Direct & Indirect):  
**13,900**  
(increase of 26% from 2015)

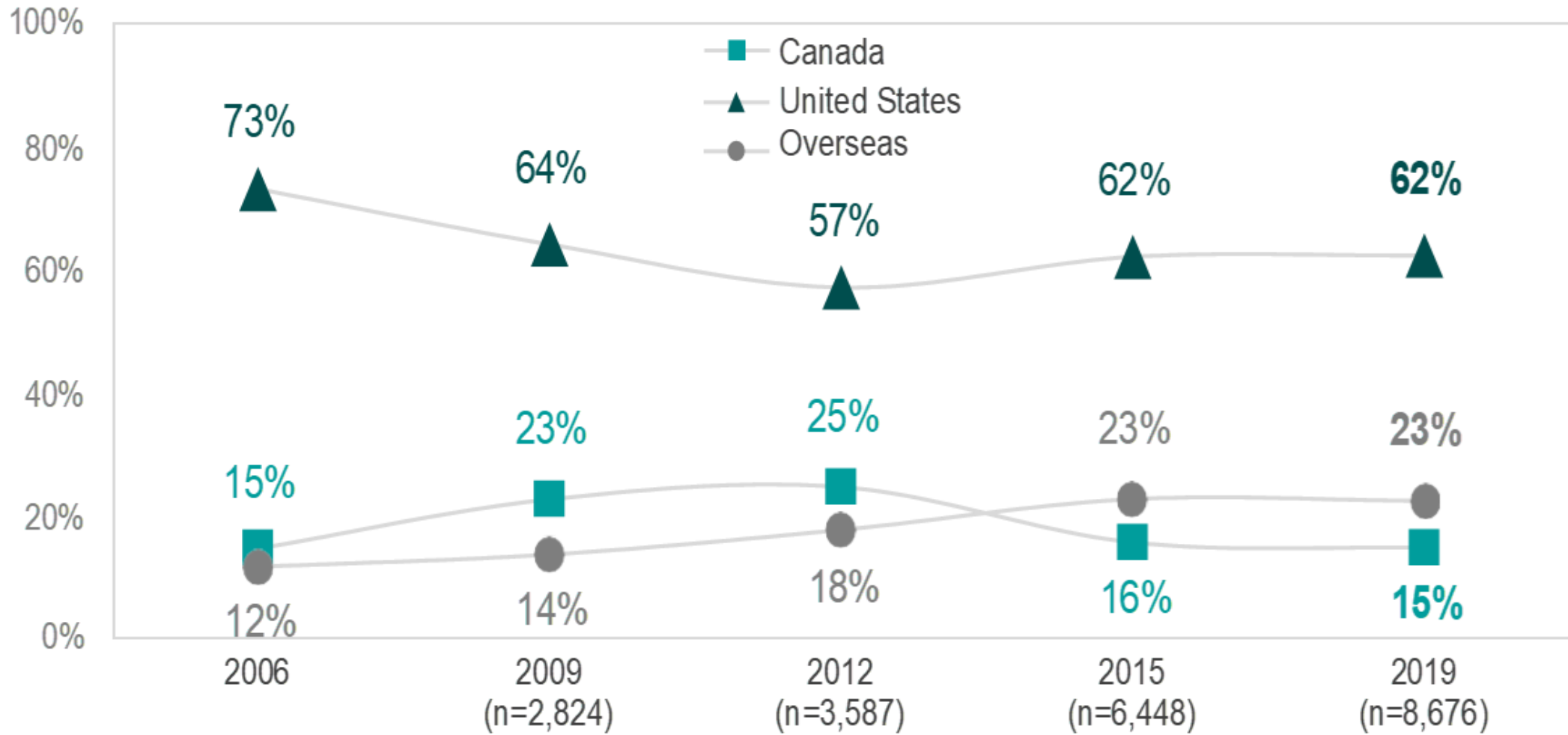
Total Wages  
(Direct & Indirect):  
**\$675 M**  
(increase of 34% from 2015)

Export Revenue (non-  
Canadian expenditures):  
**\$1.03 B**

# Challenges and Constraints

- Canada Place Cruise Terminal limited footprint (despite creative solutions – Convention Centre, Parkade, etc)
- Lions Gate Bridge re tides
- Resourcing challenges
- Dependencies

# Demographics by Residency



# Demographics by Age

**Cruise Passenger Demographic Profile Over Time (Intercept Surveys)**

Intercept Interviews	2006	2009 (n=2,824)	2012 (n=3,587)	2015 (n=6,448)	2019 (n=8,676)
<b>Age</b>					
18-34	6%	5%	5%	6%	<b>7%↑</b>
35-44	9%	12%	7%	9%	<b>9%</b>
45-54	14%	13%	17%	17%	<b>15%↓</b>
55-64	18%	15%	36%	31%	<b>32%</b>
65-74	23%	25%	28%	30%	<b>31%</b>
75+	30%	29%	6%	6%	<b>6%</b>
<b>Gender</b>					
Male	43%	35%	32%	37%	<b>36%</b>
Female	57%	65%	68%	63%	<b>64%</b>



# Selected Transportation Modes by Residency – Before and After Cruise

	Total				Canada [A]				United States [B]			
	To Vancouver		From Vancouver		To Vancouver		From Vancouver		To Vancouver		From Vancouver	
	2015 (n=1,472)	2019 (n=824)	2015 (n=1,198)	2019 (n=968)	2015 (n=259)	2019 (n=194)	2015 (n=236)	2019 (n=223)	2015 (n=782)	2019 (n=346)	2015 (n=618)	2019 (n=450)
Air	75%	<b>81%↑</b>	73%	<b>72%</b>	65%	<b>71%</b>	61%	<b>64%</b>	87%	<b>87%</b>	80%	<b>76%</b>
Train	7%	<b>8%</b>	5%	<b>5%</b>	-	<b>2%</b>	1%	<b>1%</b>	4%	<b>4%</b>	4%	<b>2%</b>
Motor coach	7%	<b>7%</b>	8%	<b>12%↑</b>	7%	<b>6%</b>	9%	<b>13%</b>	3%	<b>6%↑</b>	9%	<b>13%↑</b>
Privately owned car	6%	<b>6%</b>	5%	<b>5%</b>	20%	<b>16%</b>	20%	<b>14%</b>	5%	<b>4%</b>	4%	<b>3%</b>
Rental car	3%	<b>3%</b>	5%	<b>4%</b>	-	<b>2%</b>	3%	<b>1%</b>	3%	<b>3%</b>	5%	<b>4%</b>
Ferry	2%	<b>2%</b>	2%	<b>2%</b>	9%	<b>8%</b>	7%	<b>6%</b>	-	<b>&lt;1%</b>	-	<b>1%</b>
Other	1%	<b>4%↑</b>	3%	<b>5%↑</b>	3%	<b>9%↑</b>	5%	<b>7%</b>	0%	<b>4%↑</b>	2%	<b>5%↑</b>

# Passengers Connecting from YVR

	Arrival Airport		Departure Airport	
	2015 (n=1,149)	2019 (n=635)	2015 (n=896)	2019 (n=689)
Vancouver (YVR)	93%	<b>94%</b>	97%	<b>97%</b>
Seattle-Tacoma	3%	<b>2%</b>	1%	<b>2%</b>
Victoria	1%	-	-	-
Calgary	2%	-	-	-
Other	1%	<b>4%↑</b>	1%	<b>2%</b>

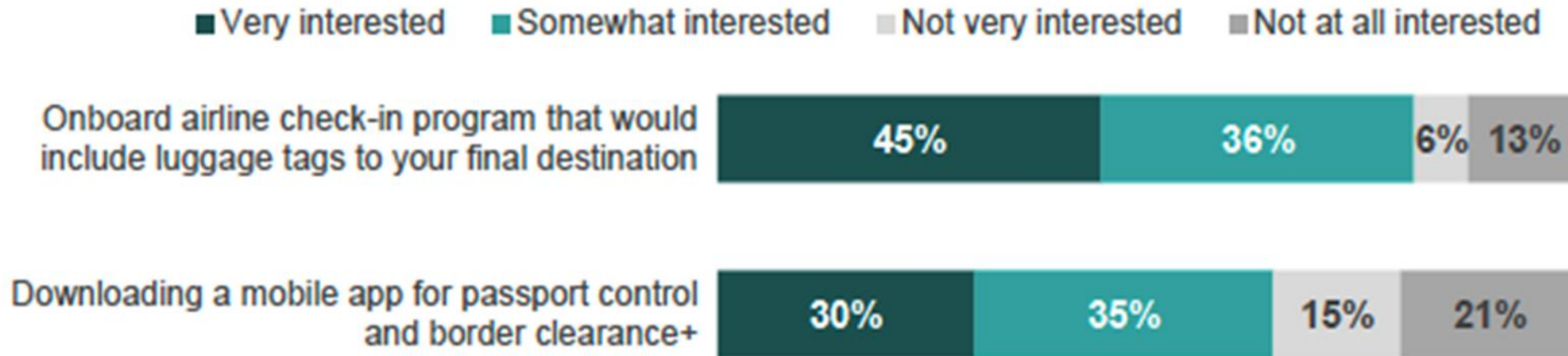
# Passengers Staying in Hotels

## Overnight and Day Visits to British Columbia

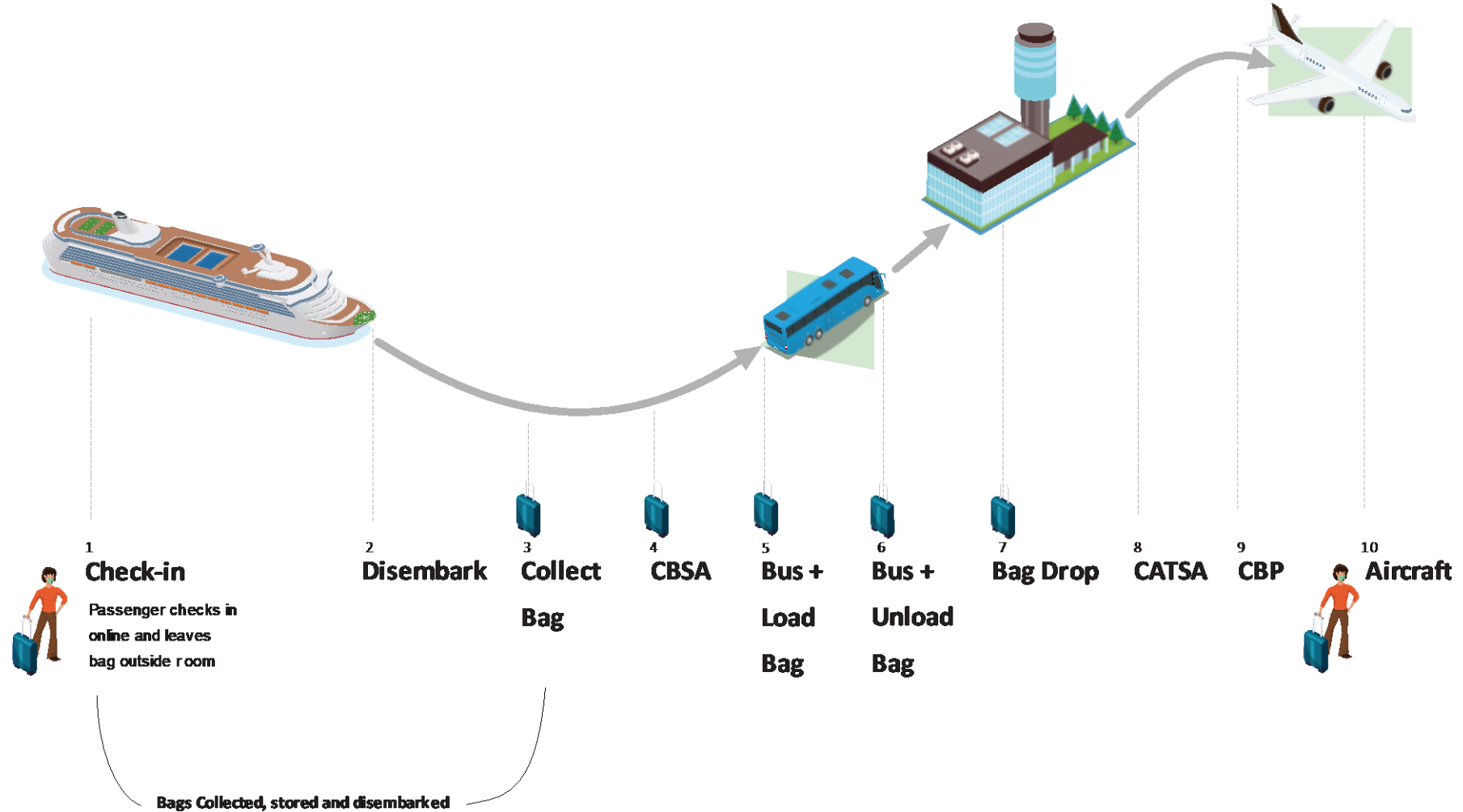
All Passengers	Total BC		Vancouver		Victoria		Whistler		Other BC	
	2015 (n=2,123)	2019 (n=1,235)	2015 (n=2,123)	2019 (n=1,235)	2015 (n=2,123)	2019 (n=1,235)	2015 (n=2,123)	2019 (n=1,235)	2015 (n=2,123)	2019 (n=1,235)
ANY TIME SPENT	86%	<b>74%↓</b>	84%	<b>71%↓</b>	17%	<b>19%</b>	12%	<b>9%↓</b>	16%	<b>23%↑</b>
Day only visit	12%	<b>26%↑</b>	13%	<b>11%</b>	5%	<b>11%↑</b>	3%	<b>4%</b>	2%	<b>7%↑</b>
Overnight visit	74%	<b>63%↓</b>	71%	<b>60%↓</b>	12%	<b>9%↓</b>	9%	<b>5%↓</b>	14%	<b>15%</b>
1 night	24%	<b>16%↓</b>	25%	<b>19%↓</b>	4%	<b>3%↓</b>	4%	<b>3%↓</b>	2%	<b>5%↑</b>
2-3 nights	27%	<b>25%</b>	33%	<b>28%↓</b>	7%	<b>5%</b>	5%	<b>2%↓</b>	5%	<b>4%</b>
4+ nights	23%	<b>22%</b>	13%	<b>12%</b>	2%	<b>1%↓</b>	0%	<b>1%↑</b>	7%	<b>6%</b>
Average # of nights+	3.7	(n=763) <b>3.8</b>	2.5	(n=722) <b>2.5</b>	2.3	(n=131) <b>2.1</b>	2.0	(n=87)* <b>1.9</b>	4.3	(n=230) <b>4.1</b>



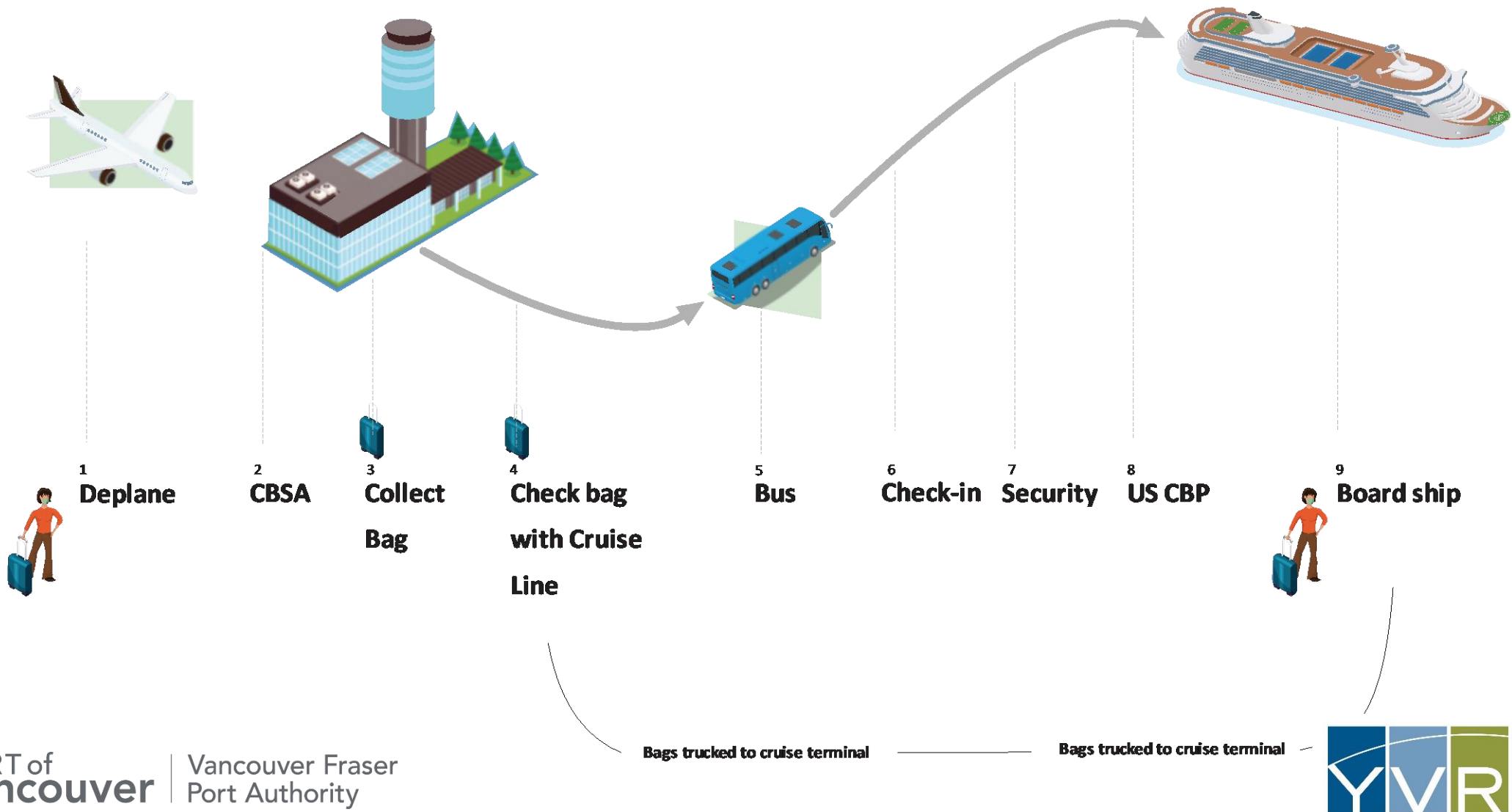
# Passenger Interest in New Initiatives



# Current Process: Ship to Aircraft



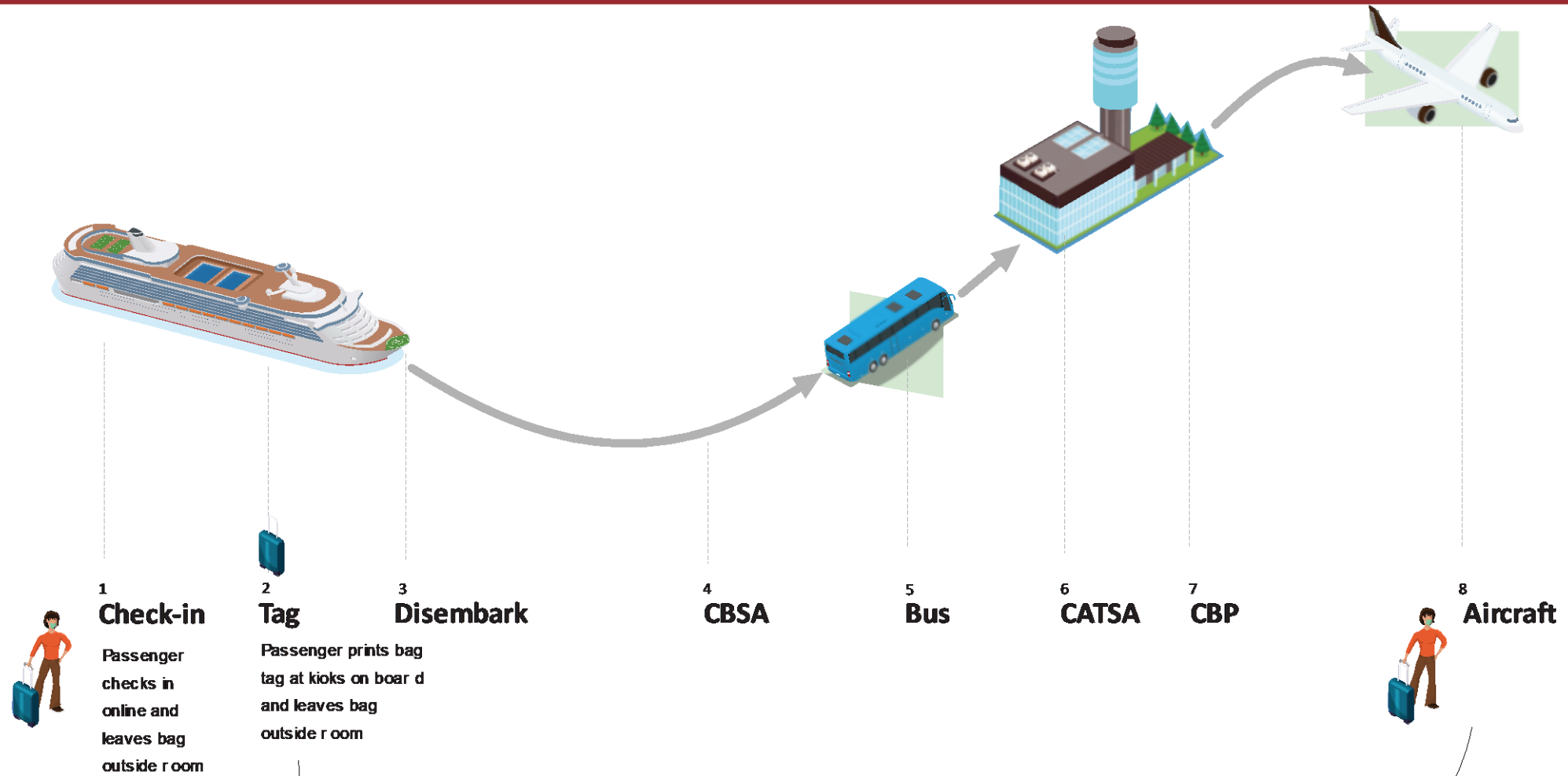
# Current Process: Aircraft to Ship



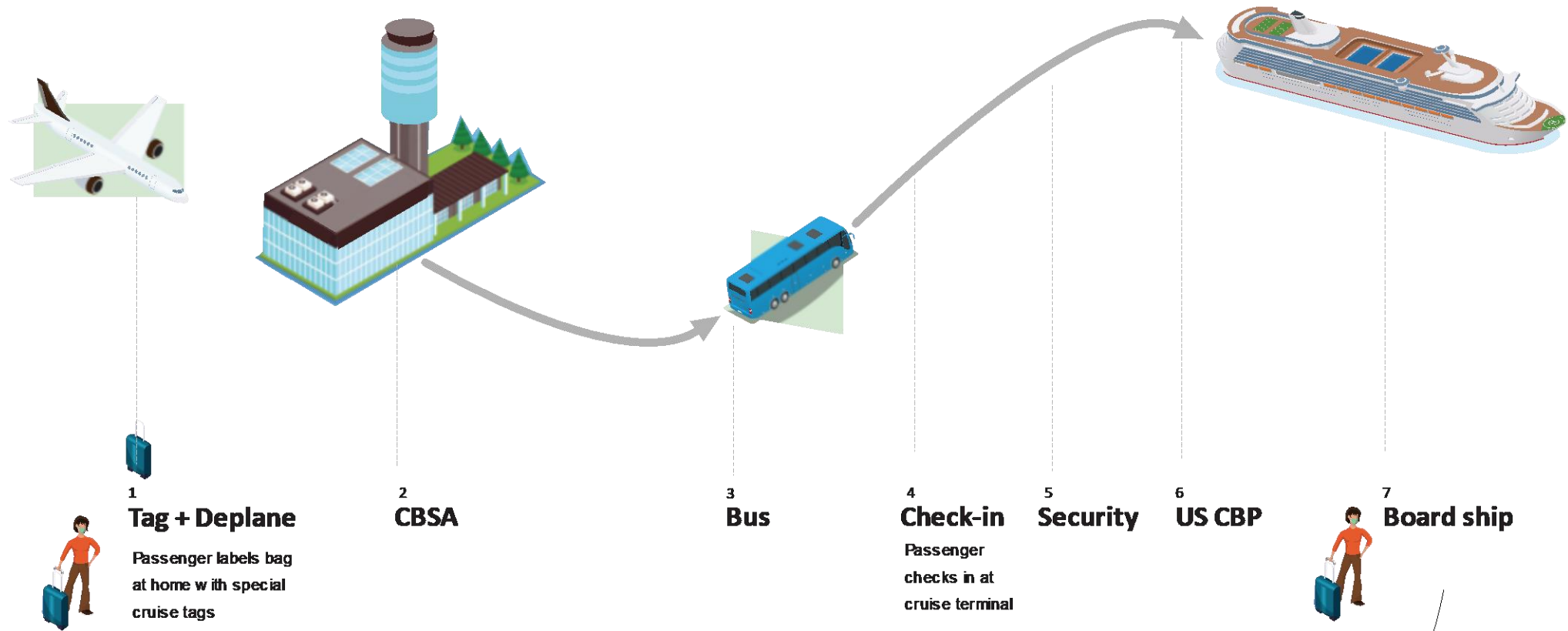
# Is there an Opportunity for Improvement?

- CBSA Perspective –
  - Sharon Spicer  
Director General, Travellers Operational Guidance and Support,  
Travellers Branch
- CBP Perspective -
  - Joshua Nutzhorn  
Regional Port Director

# Streamlining the Process Ship to Aircraft



# Streamlining the Process Aircraft to Ship



Can technology help enhance this process in a way that suits a wide range of demographics?

Can we learn from examples outside of the air-marine sectors?

# Brainstorm Session – Cruise Terminal to Airport

1. To enhance the experience for passengers, where should we focus attention first?
2. In what ways can we work together to make the experience more seamless for passengers?
3. Can baggage go to the airport early to promote tourism in the city?
4. How can we innovate the baggage transfer process from ship to airport?
5. What does industry need from regulators and policy makers?



# Brainstorm Session – Airport to Cruise Terminal

1. How can we make the transfer from airport to cruise be more seamless?  
Consistent?
2. Can baggage go to the pier early to promote tourism in the city?
3. How can we innovate the baggage transfer process from aircraft to ship?



Thank you