



annual report 2013 | 2014



www.cruisedownunder.com



**CRUISE
DOWNUNDER**
your first port of call



Cover photo acknowledgement
Top: Tourism WA

Message from the Chair

Dear Member

I am pleased to present the Annual Report for Cruise Down Under for the period 1 July 2013 to 30 June 2014.

The Annual Report is prepared by the Management Committee in line with accepted business practices and governance principles adopted by the Committee.

The 2013–14 cruise ship season was a record breaking season, with close to 800 port calls to 32 ports and anchorages around Australia. The biggest growth has been in ships home-ported for all or part of the year. These ships undertook a range of cruises to many Australian destinations as well as the South Pacific, New Zealand and Papua New Guinea.

The cruise industry remains the strongest performing sector of the tourism industry and as you will read in the Cruise Shipping Overview report, the industry is optimistic about the coming years, with many cruise lines investing in new builds, seeking new destinations and looking to increase their yields.

Cruise Down Under continues to maintain a high profile within the cruise industry, working with international cruise lines, the Australian tourism industry, port authorities and State and Federal Governments to ensure the industry continues to grow and deliver benefits to each and every stakeholder.

CDU's Strategic Plan clearly articulates our objectives and implementation of the strategy remains our key priority.

Our key achievements in 2013–14 were:

- Welcomed 6 new members to CDU, whilst maintaining all existing members
- Delivered a successful CDU Conference in Cairns in September 2013, with two leading international cruise executives as keynote speakers
- Exhibited at Cruise Shipping Miami with an extended display and floor space to more effectively engage with the cruise lines
- Conducted cruise line meetings in Miami, Los Angeles, New York and Seattle
- Finalised a refresh of the CDU website and marketing collateral
- Provided input and formal submissions to the Government Review of the Coastal Trading Act and the Productivity Commission enquiry into Tasmanian Shipping and Freight (the driver behind the Coastal Trading Act Review)
- Undertook a strategic review of the CDU's executive requirements which resulted in the commitment to recruit an external chairman from 2014 for a two year period.

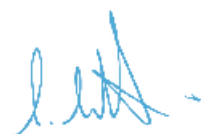
Over the past twelve months the CDU Management Committee continued to provide strong leadership and governance to its members and ensured that the Australian Pacific region continued to be recognised as a leading cruise destination.

I would like to thank the Fremantle Ports, Port of Newcastle, Tourism Northern Territory, South Australian Tourism Commission, Bob Wood Cruise Group, Sydney Ports and the Hobart City Council for their support for CDU. Each organisation has given their support to a staff member sitting on the management committee. This is a considerable time commitment and, as a small organisation, we call on our management committee members to provide support to the General Manager throughout the year.

I would like to extend my thanks to Jill Abel, CDU's General Manager who has been responsible for the implementation of the Annual Operating Plan. Jill's knowledge, experience and commitment is greatly appreciated by Management Committee and myself.

Lastly, I would like to thank all CDU members for your continued support over the past year.

Yours sincerely



Ms Chris White
Chairman
30 June 2014



Cruise Down
Under has focused
on working with
members and
industry to ensure
that our region
remains a key
destination for
cruise lines.



contents

Letter to Members	1
Vision, Mission and Objectives	5
General Manager's Report	6
Highlights of 2013-2014	9
Cruise Shipping Overview	10
Management Committee	20
Management Committee Meetings	22
Annual Operating Plan	24
Project Reports	
2013 Cruise Down Under Conference	26
Cruise Shipping Miami Convention	26
Economic Impact Study	27
About Cruise Down Under	31
Past Annual General Meetings and Cruise Conferences	32
Past Management Committees	33
Members' Register	34
Acknowledgements	37
Annual Financial Report	39
Auditor's Declaration	45

A close-up portrait of a smiling Indigenous Australian woman. She has dark, wavy hair and is wearing traditional white body paint on her face and chest. She is holding a basket of native fruits, including red berries and yellow-green fruits. The background is a soft, out-of-focus green.

CDU is the
co-operative
marketing
brand for cruise
destinations and
service providers to
the cruise industry
in Australia and the
South Pacific.



charter

Cruise Down Under is the co-operative marketing brand for cruise destinations and service providers to the cruise industry in Australia and the South Pacific.

Cruise Down Under is a non-profit incorporated association formed in 1998.

Cruise Down Under is a membership organisation comprising Australian ports, tourism agencies, cruise lines, shipping agents, inbound tour operators and companies associated with the cruise shipping industry in Australia and the South Pacific.

Vision

Develop and grow the Australia, Asia and South Pacific region (CDU region) as a major world class base and destination for cruise ships.

Mission

Cruise Down Under (CDU) is the peak cruise industry association growing and developing the Australia/Pacific region as one of the world's leading cruise destinations providing opportunities for ongoing economic, social and environmental sustainability.

Objective

To influence cruise and charter operators to develop itineraries and/or base their cruise ship visits in the CDU region. To achieve this, CDU has set itself the following five key objectives:

Leadership and Governance

- Establish strategies to continue the recognition of CDU as the respected industry organisation connecting with the broader cruise industry.

Research and Insight

- Provide CDU members with useful, accurate and meaningful research and customer information.

Position and Market the Cruise Down Under region as a World Class Destination

- Market and promote the CDU region as an attractive and diverse cruise destination for world class cruising.

Growing Membership

- Grow membership and provide high valued benefits and services to members.

Stakeholder and Partnership Development

- Develop greater collaboration and affiliation with stakeholders and partners.



general manager's report

Australia and the South Pacific region continues to exceed all cruise industry expectations. The region is now one of the greatest sources of cruise ship passengers for global cruise lines, and a real focus on the international cruise line map. International passenger numbers continue to grow and we are now seeing a complete suite of cruise product available for fly/cruise options along with the development of shore based experiences enticing the 'round the world' cruises.

We welcomed six new members to the association and maintained our highest ever level of membership (78 members). We held industry forums in Melbourne, Sydney and Adelaide to promote the cruise industry to tourism operators, to drive membership and support the industry to deliver successful outcomes.

Our key activities for 2013–14 were as follows:

Leadership and Governance

CDU continued to be represented on the National Sea Passenger Facilitation Committee, a Federal Government initiative that has been retained by the incoming Government. We have also been involved in the Government Review of the Coastal Trading Act and the Productivity Commission inquiry into Tasmanian Shipping and Freight (the driver behind the Coastal Trading Act Review). CDU made formal submissions to both inquiries.

Research and Insights

The 2013 Cruise Down Under Conference, titled "Cruising ahead in a competitive environment" was held in Cairns from 11-13 September. Hosted by Tourism Queensland, Ports North and Tropical Tourism North

Queensland, the conference, attracted 126 delegates from Australia, New Zealand, Papua New Guinea, Indonesia and USA.

Keynote speakers included John Tercek, VP, Commercial and New Business Development, Royal Caribbean Cruises Ltd., Ellen Lynch, Director Excursions for Holland America Line and Seabourn, and Sarina Bratton, founder of Orion Expedition Cruises.

The conference focused on the ways in which Australia and the region can continue to increase the market share in what is a very competitive environment.

The Economic Impact Study continued to be a major project in 2013–14 and with our ninth report being presented it has become the "go-to" report on the economic benefits of cruising in our region. The 2012–13 season results were released at the CDU Conference in September 2013, reporting yet another year of industry growth. The findings of the 2013–14 year will be presented at the 2014 Cruise Down Under Conference in Perth.

The 2012–13 study undertaken by AEC Group continued to be funded by CDU and Tourism Australia. The

study reports on both the international impacts of cruise shipping as well as the domestic activity. The study reports a total expenditure of both international and domestic activity of \$2.88 billion in 2012–13, including direct expenditure of \$1.7 billion. This was a 23% increase from 2011-12 when total direct expenditure was estimated at \$1.3 billion. If looking solely at the international market, the total expenditure was \$2.05 billion. A more extensive summary of the findings can be found later in this annual report and is also available on the CDU website.

The Cruise Research Support Fund continued to be a great success. We supported cruise passenger research studies in Sydney and Adelaide. Valuable information gained from these studies has been integrated into CDU's Economic Impact Study.

Marketing

CDU and its members hosted a number of familiarisation programs throughout the year, with the majority occurring around the CDU conference.

Cruise Down Under continued to build our profile at Cruise Shipping Miami (CSM) in 2014 with a number of enhancements. We embraced the



opportunity to increase our floor space again from 2012, creating a fourth meeting area at the booth. With a large contingent of CDU members attending this year, the additional space was welcomed and enabled up to four meetings to be held concurrently at our booth. Our appointment schedule was again very full and we were able to meet with almost all the major cruise lines over the course of CSM and in our subsequent sales calls.

In the highly competitive trade show environment, getting cruise executives' attention is always a challenge, with many destinations hosting functions on their booths. Building on the success of our 'Aussie BBQ' last year, this year we extended an invitation to Cruise New Zealand to co-host our "Down Under BBQ". The event was again a great success, drawing cruise line executives and industry partners to our booth for NZ wine and Aussie food and entertainment. We introduced some entertainment with a didgeridoo player performing throughout the afternoon.

CDU was represented at Cruise Shipping Asia in Singapore in November and feedback was provided on the state of the Asian industry. The Asian market, both as a source market and a destination, continues to grow, and the opportunities for seasonal deployments in Australia and Asia are proving to be cost effective for cruise lines as the seasons

are complementary. Repositioning ships from the northern hemisphere summer to southern hemisphere is cheaper and less time-consuming than from North America.

CDU also:

- Supported Tourism Australia at the Cruise3Sixty event and conducted a subsequent webinar on cruise
- Maintained regular communication with key cruise line partners on cruise product and infrastructure developments
- Presented at a range of tourism and port sector forums including Australian Tourism Export Council (ATEC) Meeting Place.

Growing Membership

The Management Committee continued its commitment to engage with members and industry around Australia. The committee has met in Melbourne, Cairns, Sydney and Adelaide in the past year. We also engaged with Cruise WA during a conference reconnaissance trip.

The strong work delivered by the Management Committee resulted in six new members joining CDU and the highest ever level of membership.

Stakeholder and Partnership Development

With the change in Government, we have been working to build new relationships and ensure the cruise sector is highlighted in the tourism focus. We have continued to work with industry partners and in particular the newly formed Cruise Lines International Association (Australasia) (CLIA) throughout the year to encourage united messages and deliver on the needs at all levels of the industry. We have also worked with industry through ATEC to strengthen the cruise message in the broader tourism community.

I wish to thank and acknowledge the efforts of the Management Committee for strategically driving the organisation and to all of the members for supporting our initiatives.

Jill Abel
General Manager



The 2013 Cruise
Down Under
Conference, titled
*"Cruising ahead
in a competitive
environment"*
was held in
Cairns from the
11-13 September.

highlights and achievements of 2013 | 14

2013 Cruise Down Under Conference	<p>The 2013 Cruise Down Under Conference, titled <i>"Cruising ahead in a competitive environment"</i> was held in Cairns from 11-13 September. Hosted by Tourism Queensland, Ports North and Tropical Tourism North Queensland, the conference attracted 126 delegates from Australia, New Zealand, Papua New Guinea, Indonesia and USA.</p> <p>Keynote speakers included John Tercek, VP, Commercial and New Business Development, Royal Caribbean Cruises Ltd., Ellen Lynch, Director Excursions for Holland America Line and Seabourn, and Sarina Bratton, founder of Orion Expedition Cruises.</p> <p>The conference focused on the ways in which Australia and the region can continue to extend the market share in what is a very competitive environment.</p>
Cruise Shipping Miami 2014	<p>The Chairman and General Manager led a CDU delegation at the Cruise Shipping Miami Convention and met key cruise line executives at the Convention and subsequently during sales calls in New York, Seattle and Los Angeles.</p> <p>The expanded stand continued to provide a successful working area for key meetings and promotional activities.</p> <p>We combined with Cruise New Zealand to host a Down Under BBQ which drew huge crowds to the stand. We had 5 team members attend the "Women in Cruise Breakfast".</p>
Finance	<p>The Association has continued to maintain a strong financial position, enabling us to deliver a range of marketing initiatives and programs for members and stakeholders. Successfully obtained Federal funds through the Export Marketing Development Grant.</p>
Economic Impact Report	<p>The 2012–13 study reported a total expenditure of both international and domestic activity of \$2.88 billion in 2012–13, including direct expenditure of \$1.7 billion. This was a 23% increase from 2011–12 when total direct expenditure was estimated at \$1.33 billion. The international market total expenditure was \$2.05 billion.</p>
Membership	<p>Six new members were welcomed to CDU in 2013–14. There were no resignations. Hosted membership events in Melbourne, Sydney and Adelaide.</p>
Marketing and Promotion	<p>We continued to actively promote CDU as an organisation, its members and the exciting destination opportunities our region has to offer to the global cruise market.</p>
Management Committee Meetings	<p>Industry/stakeholder information sessions were held in Melbourne, Sydney and Adelaide to coincide with Management Committee meetings.</p>



cruise shipping overview

A team of CDU members attended the Cruise Shipping Miami Exhibition and Conference in March of 2014. The “State of the Industry” session provided a global overview of the industry and discussions raised pertinent issues such as safety, regulation, marketing and projected growth. The clear message from the presentation was that the industry appears to have survived what has been described as six years of challenging times and events and is now focusing on increasing yield. All cruise lines were optimistic about the coming year.

Global Cruising

The cruise sector continued its strong growth in 2013, remaining the fastest growing sector of the tourism industry. The Asian market, both as a source market and a destination, continues to grow, and the opportunities for seasonal deployments in Australia and Asia are proving to be cost effective for cruise lines as the seasons are complementary. Repositioning ships from the northern hemisphere summer to the southern hemisphere is cheaper and less time-consuming than from North America.

A summary of the global cruise industry:

1. The cruise sector continued, for another year, to be the fastest growing sector of the travel industry;
2. 21.3 million passengers took a cruise in 2013, up from 20.3 in 2012;
3. It is expected that 21.7 million people will take a cruise in 2014;
4. The global cruise industry was valued at \$37.1 billion in 2013, up 2.3% from 2012;
5. There will be 29 ships with a capacity of 34,000 passengers entering the global fleet by 2014;
6. The USA continues to rank the top passenger source country at 51.7%

followed by UK/Ireland at 8.1%, Germany at 7.7%, Italy at 4.0% and Australia at 3.6%;

7. Australia now makes up 5.9% of the ship deployment market share;
8. Australia's population penetration is up to 3.6%, making it the highest ranked country;
9. Whilst the European economy has been shrinking, European cruise has seen a 4% growth in 2013 with general tourism experiencing 0% growth;
10. Australia's biggest challenges continue to be remaining competitive on port pricing and improving berth availability in major ports such as Sydney and Brisbane;
11. Asia and Australia are seen as great opportunities and, more importantly, complementary with deployments between seasons made easily;
12. Emphasis will be on improved technology and connectivity at sea, more all-inclusive packages and active vacations at sea;
13. Millennials (born 1990-2000) will drive first-time cruiser growth and a continued growth in multi-generational travel;
14. Luxury cruising will see a resurgence.

National and Regional Cruising

Cruising in Australia has for another year maintained its position as the fastest growing sector of the tourism industry. The continued deployment announcements from the major lines brought more ships with the full range of experiences (from expedition to affordable family to luxury) with increased capacity and variety of itineraries.

Cruise Lines International Association Australasia (CLIA) reported that Australian cruise passenger numbers in 2013 surged by 20% to reach an all-time high of 833,348 in 2013, compared to 694,062 in 2012. Australia's growth rate of 20% was the highest of all developed cruise source markets in 2013 and Australia is now the leading source market in the world with a penetration rate of 3.6%.

Current projections will see one million Australians taking a cruise, somewhere in the world, by the year 2016.



STATE REPORTS

NEW SOUTH WALES

A busy cruise ship season was recorded in New South Wales in 2013–14 with more than 270 cruise ship visits to Sydney and the regional ports of Newcastle and Eden.

At season's peak in February, Sydney received a record 39 visits by 25 cruise ships during "Super February", up from 36 visits last February, again demonstrating the strength and popularity of the growing cruise industry in Sydney.

A highlight of the season was Cunard's magnificent *Queen Elizabeth* cruise ship, carrying 1,900 guests, arriving in Circular Quay in March wishing Sydney a fabulous Mardi Gras. As the vessel came into the harbour at 7am it featured a 2.2m high glittering stiletto and a sparkling rainbow cape, stretching 12.5m wide and 126m long.

During the low season for cruise, April and October 2014, the Overseas Passenger Terminal in Sydney will receive a \$49 million upgrade. The upgrade will improve the overall passenger experience and ensure the facility can comfortably achieve a one-day turnaround for the largest ships able to berth there.

More than 290 ships have so far booked for the 2014–15 season in Sydney including maiden calls from *Carnival Legend* in September 2014 and

Celebrity Century in October 2014.

A successful 2013–14 cruise ship season in Newcastle saw nine cruise ship visits delivering 22,000 visitors to the Hunter Region. The highlight of the season was the *Celebrity Solstice* visit in March. On entering port, the 317 metre long *Celebrity Solstice* became the longest vessel to visit the Port of Newcastle, eclipsing the previous record set in 1986. The port safely handled a cruise ship the size of *Celebrity Solstice*, demonstrating Newcastle's capability to meet the needs of the larger cruise ships being deployed to Australia.

Multiple visits were received by Royal Caribbean's *Rhapsody of the Seas* and *Radiance of the Seas*, while P&O Cruise's Australia's *Pacific Dawn* made her maiden call to Newcastle. New tourism product and shore tour options continue to emerge in the Hunter Region, adding more variety of experiences for cruise visitors.

The 2014–15 cruise season in Newcastle is scheduled to see a return of all cruise brands from the previous season, as well as some new brands who will visit Newcastle Port.

Eden, in Southern NSW, hosted two cruise ship visits over the 2013–14 season. The Port of Eden was bursting with international and Australian visitors when the Seabourn *Sojourn* and *Astor* arrived on the same day in February. Passengers loved visiting a small seaside town and many enjoyed

sightseeing aboard the hop-on hop-off shuttle bus, to sight-see and organised tours included visits to Bega Cheese, Wheelers Oysters and Ben Boyd National Park.

It has been an exciting year for the Port of Eden with plans to undertake a major upgrade and expand capacity to allow the Port of Eden to accommodate more and larger cruise ships in the near future.

The Port of Eden looks forward to a busy cruise season next year and to welcoming more cruise ships in the future to the villages and coastal wilderness of the pristine Sapphire Coast of NSW.

DARWIN & THE NORTHERN TERRITORY

Australia's Northern Territory has welcomed over 60,000 passengers and crew on 38 cruise ship visits to the Port of Darwin. Most of these visits occurred between October and May. Darwin is the home port for smaller expedition vessels exploring the Kimberleys, the Tiwi Islands and Arnhem Land during the dry season (May–September).

A highlight of our cruise season was the maiden visit to Darwin by *Silver Discoverer*, whose maiden voyage along the remote Kimberley coastline culminated successfully in Darwin on 12 April. We look forward to welcoming her and her passengers back in 2015, as well as



cruise shipping overview

other expedition vessels *MV National Geographic Orion*, *Caledonia Sky*, and Coral Princess Cruises' two vessels, *Coral Princess* and *Oceanic Discoverer*. With easy access to some of Australia's most remote coastlines and Aboriginal communities, and a major city supporting full-service aviation carriers as well as a host of local providores, Darwin continues to benefit from this growing segment in the cruise sector.

Darwin also welcomed three of the sea's leviathan ships, *Voyager of the Seas*, *Celebrity Solstice* and *Queen Mary 2*. These successful visits to Darwin demonstrated Darwin port's capacity to cater to the needs of the largest ships sailing in Australian waters, offering a range of exciting shore excursion options for their thousands of passengers.

Tourism NT and Tourism Top End have worked tirelessly with tour operators to provide new and improved shore excursion and overland excursions. These include Segway tours around the city; the hop-on hop-off Darwin Explorer; Crazy Acres tropical fruit farm shop; the Crocodylus Park River Cruise; and a host of itineraries designed by small-group tour operators to suit cruise ship schedules and providing high levels of personal interaction with locals.

Long-established attractions such as the Defence of Darwin Experience, Territory Wildlife Park, Litchfield National Park, Kakadu National Park, the Museum and Art Gallery of the NT, cruises on Darwin Harbour and the George Brown Botanical Gardens remain popular shore excursion inclusions.

Tourism NT attended Cruise Shipping Miami to promote Darwin as Australia's Northern Gateway Port. Darwin remains an important stop on circumnavigations of Australia, with a range of ships' agents, providores, fuel suppliers and other service providers available. Training sessions with reservations staff in US head offices were also held, promoting knowledge of the region as well as sales tips to increase shore excursion participation.

Uluru (Ayers Rock) in Central Australia remains a popular choice for visitors to explore our pioneering heritage and rich Indigenous culture. The legendary rail journey through the heart of Australia on The Ghan remains popular with cruise enthusiasts.

Darwin Port Corporation continues to provide an excellent level of service for large, medium and small cruise ships visiting the region, and Tourism Top End continues to coordinate an army of volunteer meet-and-greet tourism ambassadors at the port.

Darwin retailers have embraced the opportunity that the cruise sector brings to the city, with the vast majority of shops remaining open on weekends and public holidays for cruise ship visitors.

Tourism NT has contributed to the national debate around federal regulations on foreign-flagged expedition vessels, working with a number of stakeholders and government bodies to encourage easing the barriers to entry into the market by some of the world's best expedition ships.

QUEENSLAND

Queensland enjoyed a very successful year, with 239 ships in total visiting ten ports and moorings along the Queensland coast. This represents an 11% increase from 215 from the year before. The highlight of the season was definitely the second week in March, when Brisbane welcomed eight ships in one week and the whole of Queensland enjoyed 15 ship visit days in total.

Moreton Island welcomed cruise ships for the first time, and passengers have responded well to the unique shore excursion opportunities that have been offered by the Tangalooma Island Resort. Carnival Australia has also announced that they will visit Mooloolaba for the first time in the second half of 2014, so the community and tourism operators are preparing with great expectation.

A diverse range of shore excursions have been developed for many destinations and work has been undertaken in ensuring the delivery of the highest level of interpretive experience. These have proved popular with passengers and cruise lines. Forums and workshops have been held with the tourism industry to ensure Queensland offers unique experiences that reflect our destinations and personality. The focus for the coming year will be to attract smaller expedition cruise ships to our waters and to ensure tourism operators and communities deliver an experience to the cruise ship passenger that exceeds their expectations.



There have been several exciting home-porting announcements for Brisbane, increasing the pre and post cruise touring and accommodation opportunities for Brisbane and changing the industry landscape considerably. The *Pacific Jewel* will be base-ported out of Brisbane from end June 2014, joining the *Pacific Dawn* and offering some unique itineraries. The *Sun Princess* will be base-ported from August 2015 to November 2015 and then her sister-ship the *Sea Princess* from November 2015 to April 2016. Royal Caribbean Lines announced last month that the 2000 passenger *Legend of the Seas* will be base-ported in Brisbane for a five month deployment from December 2015. This is the first home-ported Royal Caribbean Line ship for Queensland and represents an unprecedented confidence in the Brisbane market from this major cruise line. The economic benefits of these recent announcements will be a significant boost to the Queensland economy.

SOUTH AUSTRALIA

South Australia hosted a very successful cruise ship season from November to May, with 28 cruise ship visits to Adelaide and the regional ports of Kangaroo Island and Port Lincoln. The expedition cruise vessel *True North* also offered itineraries along the South Australian coastline.

For the fifth year in succession, the *Queen Mary 2* visited Adelaide as part of her circumnavigation of Australia. After 5 previous visits, her arrival still gets South Australians excited and attracts massive crowds of spectators

watching her come into Port Adelaide and sail along the coast of suburban Adelaide. For the second consecutive year, we attracted the largest ships sailing Australian waters including *Celebrity Solstice* and *Voyager of the Seas* along with overnight visits in Adelaide from the Volendam & Seabourn *Sojourn*.

The South Australian Tourism Commission (SATC) continues its focus on developing infrastructure and product in all South Australian ports. The new tender landing structure at Penneshaw on Kangaroo Island is proving very popular and provides a very safe and easy-to-use debarkation point for tender passengers. The new Sealink Passenger Terminal opened in March 2013, offering an even more welcoming arrival into Penneshaw. With seven arrivals during the season and eight scheduled for next season, Kangaroo Island continues to be an attractive, welcoming and popular port of call for passengers and cruise lines alike. Over the past 12 months, SATC's investment at the Port Adelaide Passenger Terminal of a new gangway and new fenders on the wharf has increased our capabilities to effectively manage the growing number of passengers and larger cruise ships arriving and increased opportunities for Adelaide as a home port destination for future seasons.

Early this year, the SATC and Cruise Down Under in partnership undertook passenger surveying of over 400 passengers at the Port Adelaide Passenger Terminal with strengths highlighted in our customer service,

quality of terminal facilities and services and experiences being offered for passengers undertaking tours. Our successful 'Meet and Greet Program' in Adelaide was extended to all regional ports this season for the first time with great feedback from cruise lines and passengers and we will continue to strengthen and develop these initiatives further in coming seasons.

Continuing the work in South Australia on regional dispersal, activity is ongoing to further develop regional ports and experiences, engage local communities and educate stakeholders about the growth and benefits of supporting the cruise industry.

Kangaroo Island (often referred to as Australia's Galapagos), Port Lincoln (Australia's Seafood Capital), and the newest regional cruise destination, Robe, in the heart of the Limestone Coast, are all South Australian regional ports offering diverse experiences and are all scheduled for arrivals in the coming season. The government and private partnerships in our Team South Australia approach, and the South Australian Tourism Commission's ongoing support to the cruise industry, continue to drive success and develop opportunities for the South Australian cruise industry.

TASMANIA

During the season Tasmania enjoyed continued record growth with 63 cruise vessels bringing 108,701 passengers and 46,354 crew to the State between October 2013 and

cruise shipping overview

April 2014. Breakdown by ports and anchorages was: Hobart 36 visits, Burnie 12, Port Arthur 8, Coles Bay 3, Wineglass Bay 3 and Devonport 1.

The new Macquarie Wharf No.2 Cruise Terminal in Hobart proved a great success with both the cruise lines and passengers, providing an efficient processing space and new under-cover facilities for visitors including amenities block, retail and money exchange. The City of Hobart and Tasmanian Travel & Information Centre (TTIC) ran the ever-popular Volunteer 'Meet and Greet Program' welcoming passengers with information, advice and a friendly introduction to the port. An information desk was also manned within the new cruise terminal by TTIC staff and volunteers for every ship visit.

As well as improved facilities in Hobart, the removal of the requirement for waterside security patrols to be provided at the ports of Hobart and Burnie has reduced port costs for cruise lines visiting Tasmania.

Hobart successfully hosted return visits by the largest cruise ships currently deployed in Australia, *Voyager of the Seas* and *Celebrity Solstice*, as well as maiden visits by *Seabourn Odyssey*, *Amadea*, *Arcadia* and *Europa*.

The Port Arthur Historic Site completed an upgrade to its jetty with funding support from the Commonwealth Government's Tourism Industry Regional Development Fund. An extension to the jetty has enabled simultaneous docking for two tenders fully independent of the site's tourist ferry. The jetty was completed in time



for the season's final cruise ship visit at Port Arthur by *Pacific Pearl* on 27 April and has significantly improved tender operations to a fifth of the time required previously.

New tourism products continue to refresh the visitor experience and provide new options for shore excursions. In northern Tasmania the 1936-built tall ship, the *Julie Burgess*, a sixty-four foot wooden ketch with rich maritime heritage, has been painstakingly restored and is available for tours from Devonport, less than an hour's drive from Burnie port. Growers and producers in the fertile north-west have banded together to develop the Cradle to Coast Tasting Trail, showcasing many locations where visitors can taste and buy local

produce at the source and meet the growers and makers.

Destination Southern Tasmania is working in partnership with Tasmania's other Regional Tourism Organisations and Tasports to produce a 'Guide for Cruise and Expedition ships in Tasmania' which will be available as a downloadable PDF prior to next season.

With 66 cruise vessels currently booked for 2014–15, Tasmania looks forward to welcoming an ever increasing number of international and domestic cruise passengers to enjoy the island's spectacular scenery and wilderness, intact convict colonial heritage, fine produce and boutique beverages, and a firmly established arts and cultural scene.



VICTORIA

The growth of the cruise industry in Australia was reflected in the number of cruise ship visits to Victoria in 2013–14. A total of 73 cruise ship visits took place in 2013–14, with Station Pier hosting 67 transit visits and 18 turnaround visits. Melbourne is increasingly popular with cruise lines as a turnaround port, and whilst the *Dawn Princess* was responsible for most of the turnarounds in 2013–14, the *Pacific Pearl* also undertook three turnarounds later in the season.

Regional cruising is increasing in popularity with cruise lines seeking new destinations for their customers. This season Geelong received a total of five ship visits including the *Seabourn Odyssey* visiting on two occasions. Geelong is currently an anchorage and suitable for mid-size ships such as *Seabourn* and *Oceania* ships. Portland received its first ever cruise ship when the *Europa* called at the port in March 2014. The Victorian Government provided almost \$250,000 in funding towards upgrading the SL Paterson Berth to facilitate cruise ships berthing alongside in Portland.

Tourism Victoria also worked closely with key cruise lines to assess the viability of new regional ports and destinations for new cruise ship visits. This has resulted in P&O Cruises Australia developing new cruises to Mornington in March 2015 and the inclusion of Portland in cruises between Sydney and Adelaide in 2015 and 2016. The major factors cited

in the cruise line's decision to visit these destinations were the attractive tourism experiences and suitable berths or anchorages available.

Key marketing activities have included sales calls to cruise lines both in the USA and those based in Australia, along with visits to key ground handlers working with the cruise lines to facilitate shore excursions. In 2013–14 new marketing collateral, including a range of new cruise-specific imagery and a trade brochure, was also developed.

Port of Melbourne Corporation (PoMC) has continued improvements to Station Pier and the cruise terminal as part of its ongoing upgrade program. Works included:

- substructure/pile upgrade
- modification in the cruise terminal
- efficiency modifications to baggage handling equipment
- general maintenance
- completion of the reinstatement of the heritage crane at the pier entry.

PoMC undertook an Operational Risk Assessment of Station Pier as part of its commitment to general safety on the Pier.

PoMC's ongoing collaboration with Tourism Victoria, the City of Melbourne, the City of Port Phillip and the Melbourne Cruise Ship Committee is part of a joint effort to ensure Melbourne continues to benefit from the strong growth in this tourism sector.

WESTERN AUSTRALIA

Tourism Western Australia continues to work in partnership with industry and the WA Cruise Committee to capitalise on the opportunities presented by cruise shipping and to implement the Western Australian Cruise Shipping Strategic Plan 2012–2020.

Tourism WA delivered five cruise education workshops in regional port destinations in 2013–14. The series includes 'Cruise Ready Workshops' that provide business owners with insights into how local businesses can successfully tap into the cruise market. A second series of workshops, 'Welcoming Cruise Passengers to the West' up-skilled coach drivers, tour guides and volunteers who interact with cruise passengers.

In 2013–14, Perth's port city of Fremantle experienced one of its biggest cruise ship seasons in 40 years as WA's popularity as a cruise ship destination continues to grow. According to the City of Fremantle, passenger numbers reached levels not seen since the 1970s, with 31 ships bringing more than 60,000 tourists to Fremantle, compared to 55,000 people on 17 ships in 2012–13. Cruise and Maritime Voyages also chose Fremantle as the homeport for the *Astor*, its 620-passenger ship, for three consecutive summer cruise seasons commencing in 2013–14.

In regard to infrastructure development, Busselton and Augusta in the State's South West have been developed as new anchorage ports. Busselton, situated on Geographe Bay,



is now able to provide cruise ships with an inviting and safe anchorage due to supporting infrastructure and a passenger disembarkation point within walking distance of Busselton's main street and attractions. Busselton is an established tourism destination with convenient access to magnificent scenery, biodiversity, wineries, boutique breweries, gourmet producers, artisans and attractions. 2013–14 also saw significant cruise ship announcements, highlighting Western Australia's growing reputation as a cruise shipping destination. Carnival Australia's P&O Cruises announced it will base the 1,900 passenger ship, the *Pacific Jewel*, in Fremantle for the 2014-15 season and will become the first cruise operator to sail to Busselton, gateway to the Margaret River region, as part of its cruise program from Fremantle. *Pacific Jewel* will also sail on two eight-night cruises to the Western Australian ports of Geraldton, Broome and Exmouth and will visit Esperance during a cruise from Adelaide to Fremantle. Fremantle Ports has advised that 2014–15 is shaping up to be the biggest cruise season ever for Fremantle; with 44 ships already booked to visit. In 2015 the exclusive Crystal Cruises will be celebrating its 25th anniversary and the *Crystal Serenity* will visit Fremantle and Albany during a special 20th world cruise. In addition, Princess Cruises has announced its first ever year-round program of sailing from Fremantle. The *Sun Princess* will be based in Fremantle from November 2015 to March 2016, with its sister ships *Dawn* and *Sea*



Princess home ported in Fremantle from April to October 2015. Tourism WA will continue to work with the sector to promote WA's 10 cruise destinations, which are Perth/ Fremantle, Esperance, Albany, Bunbury, Busselton, Augusta, Geraldton, Exmouth Port, Hedland and Broome. In September 2013, it was announced that Tourism WA secured the right to host the 2014 Cruise Down Under Conference in Perth. The conference will provide a fantastic opportunity for the State to showcase its extraordinary experiences and growing cruise shipping industry.

PAPUA NEW GUINEA

Cruise ship growth in Papua New Guinea (PNG) is emerging from the development stage. The PNG national government has already warmed to the sector and has commenced new government initiatives to encourage cruise tourism.

Papua New Guinea in this season had 15 cruise ships—mostly expeditionary vessels including the maiden voyage of the vessel *Paul Gauguin*. There was also an increase in the bigger ships with maiden voyages of the *Dawn Princess*, the *Pacific Pearl* and the *Coral Princess* in PNG waters. The places visited included the port towns of Alotau, Madang, Rabaul, Lorengau and Wewak as well as the smaller islands of Wuvulu, Tingwon, Tsoi and Witu.



The highlight following last season's P&Os Carnival Australia's entry into PNG has been the increase in awareness and promotion that the destination has been receiving following the maiden cruise.

In addition, this season PNG updated its cruise promotional collateral, cruise planner and brochure. A promotional Cruise DVD including cruise hotspots of Alotau, Madang, Kavieng, Rabaul, Goroka, Mt Hagen and Port Moresby was also produced.

The continued focus for the cruise season in PNG is the Milne Bay province. The area is popular for its exquisite scenery, its colourful culture and for its historic World War II links for many Australian families. The Alotau Wharf has been redeveloped with a berthing length of 250 metres. Moreover, modern jetties are being constructed at the pristine island locations of Kitava and Kaibola in the Trobriands. There are new nautical charts now available for Cape Nelson, Dawson Strait and Oro Bay.

There is a lot of work being done in product development in Alotau and the Trobriands Islands to build capacity in local communities to cater for the cruise tourism sector. New footpaths, toilet amenities and craft markets were developed this season. Youth Volunteers in selected cruise destinations are also being trained to enhance cruise experience.

PNG is as yet an undiscovered cruise destination and there are opportunities to open many new cruise destinations in the country.



INDONESIA

During the calendar year 2014, 41 different cruise ships will be operating 392 calls in 135 different destinations of the Indonesian Archipelago. They represent cumulated traffic of 213,000 cruise passengers. This represents an increase of 26% in number of calls traffic and 33% in passenger traffic compared with 2013.

Because of the increasing size of cruise ships deployed in Australia and Asia, the Government of Indonesia is investing to dredge the access channels and the ports of Semarang, Surabaya and Benoa. At the time of writing this report, we have received only the sounding for the access

channel of Semarang. This confirms that the depth has been increased from -8m50 LWS in 2013 to -10m50 LWS in 2014. The minimum width of the channel remains unchanged at 100m.

As a result of the strong interest of expedition cruise operators in Tanjung Punting National Park, the access channel of the port of Kumai has also been deepened to -4m50 LWS in 2014, permitting expedition cruise ships to call at this destination.

With 59 cruise calls corresponding to 75,000 cruise passengers scheduled in 2014, Bali is the first destination of Indonesia. Bali offers three cruise destinations of which the main one is the port of Benoa.



cruise shipping overview

The port of Benoa has two cruise berths. The East berth is 290m long and has been equipped with new fenders and additional bollards in 2013, whilst the South berth, which is 206m long, has been strengthened, which will permit an increase in the depth alongside from -7m00 LWS to -9m00 LWS.

Turnaround traffic in Benoa is increasing with 17 turnaround calls confirmed in 2014. To meet the growing traffic the passenger terminal was enlarged in 2013 and new X-ray equipment purchased permitting the scanning of embarking cabin luggage.

Marine Gas Oil is available ex-pipe in Benoa. Intermediate Fuel Oil (IFO) 180cst as well as IFO380cst are now available ex-barge for delivery in Bali and in Lombok.

In December 2013 Le Soléal from the Compagnie du Ponant inaugurated the new cruise facilities of Nara Bay close to Senggigi Beach in Lombok. These new tendering facilities operated by Bounty Cruises will certainly boost cruise development in Lombok, permitting improvements to cruise operations to the island of West Nusa Tenggara.

And 2014 marked a major milestone for the island of Sabang situated at the northern part of Sumatra with the completion of the berth CT3 which offers a 423m long berth with a depth of water of -20m00 LWS alongside. Last 22 January the *Artania* from Phoenix Reisen was the first cruise ship to come alongside.





NEW CALEDONIA

New Caledonia has welcomed more passengers during the 2013 cruise season. Indeed, in 2013, 385 523 passengers have visited the island, which represents an increase of nearly 39% compared to 2012, and 192 cruise ships have docked in one of the four ports of the archipelago (Noumea, Isle of Pines, Lifou and Mare).

One of the biggest highlights of 2013 in the cruising industry of New Caledonia was the participation at the Miami Seatrade in March. With over 11 000 participants, the Miami Seatrade has been the world leader in conferences and expositions for the cruising industry for the past 28 years. For the 11th year in a row, New Caledonia was participating alongside Australia (represented by the Cruise Down Under Association, of which New Caledonia is a member) and New Zealand. During that same year, South Pacific Tourism joined the South Pacific Cruise Alliance (SPCA) where New Caledonia is also represented (even though the island is still not an official member).

Other important highlights of the 2013 season were the arrivals of new cruise ships. A total of 6 new cruise ships have docked in New Caledonia: *Voyager of the Seas*, *Artania*, *Marina*, *Millenium*, *Celebrity Solstice* and *Seabourn*.



New experiences for passengers have been offered for the 2013 season from the different service providers mainly in the capital city. Firstly, the company Dal'Ocean charter, which specialises in taxi boating, boat rentals and excursions, offered new customised excursions only available for cruise passengers. Secondly, the company Noumea Discovery also had new offers for passengers with stand-up paddle activities and segways experiences.

The focus in Noumea for the next twelve months will be on receiving more stopovers. In fact, the number of stopovers scheduled for Noumea for the 2014 season is 175, which represents an increase of 21 cruise ships compared to the 2013 season.

management committee – 2013 | 2014



From left: Tim Short (Hobart City Council), Thor Elliott (Fremantle Ports), John McKenna (Sydney Ports), Leah Clarke (SATC), Jill Abel (General Manager, CDU), Richard Schoonraad (Tourism NT), David Brown (Cruise Hunter), Tyler Wood (Bob Wood Cruise Group), Chris White (Tourism Victoria) Absent: Leigh Sorensen (Tourism Australia)

Chris White

Chairman

Tourism Victoria

Term expires 2014

Chris currently manages the Product Marketing division at Tourism Victoria.

Chris is responsible for marketing Victoria's key product strengths including food and wine, nature-based tourism, Aboriginal tourism and art and culture, along with cruise shipping. She is also responsible for managing partnership marketing including Victoria's relationship with domestic airlines, wholesalers and retail travel agents and the Tourism Awards.

Chris' career in tourism began in London in 1991, where she worked for JAC Travel, a large tour operator, with a wide portfolio of business interests, including education and youth travel. Upon returning to Australia in 1993, she worked for a nature-based tour operator in Victoria.

Since joining Tourism Victoria, Chris has held several senior management positions in international marketing and product and segment development.

She has been involved in the cruise industry since 2004 and is a passionate supporter of the industry. Chris joined the CDU Management Committee in 2005 and has held the role of chairman since 2010.

Chris is a graduate of the Australian Institute of Company Directors (AICD) and provides strategic advice to the Mornington Peninsula and Phillip Island Regional Tourism Boards.

David Brown

Joint Deputy Chairman Cruise Hunter

Term expires 2014

David has held the position of Cruise Hunter Coordinator for Newcastle Port Corporation since 2006. David has served on the Management Committee of Cruise Down Under since 2008 and in the role of Deputy Chairman since 2011.

Cruise Hunter is responsible for developing and implementing a local cruise strategy that positions Newcastle to capture the growing cruise industry in Australia. David works closely with the regional tourism

industry and government bodies to achieve strategic goals. This includes product development and education, marketing initiatives, infrastructure and policy making. David has experience of the cruise industry at the 'grass roots' level by managing a cooperative stakeholder approach to cruise ship visits in Newcastle. This approach ensures each port call is successful and that the destination needs and requirements of the cruise industry are delivered.

In 2006 David was selected as a Young Tourism Ambassador for Tourism Australia during the Melbourne Commonwealth Games. In 2009 David was awarded the Young Achiever Award at the Australian Transport and Logistics Industry Excellence Awards and represented Australia at the 2010 International Convention in Malta.

Prior positions held by David include in tourism and events departments for local government.

Richard Schoonraad

Joint Deputy Chairman Tourism NT

Term expires 2015

Richard is the Manager Cruise Sector Development for Tourism NT, based in Darwin. He has been with Tourism NT since 2006, having held positions in international marketing, destination development, as Marketing Manager for Territory Discoveries, and as Assistant Director of the NT Convention Bureau.

Richard has been instrumental in driving various initiatives in the NT to enhance the experiences for visiting cruise ship passengers and crew, as well as advocating the benefits of the cruise sector for the local tour operators and retailers. Richard works closely with the Darwin Port



Corporation, Tourism Top End and City of Darwin to ensure the business community is aware of activity in the cruise sector, and is equipped to develop the opportunities this sector brings.

Richard has directed the development of the Northern Territory Cruise Sector Activation Plan, drawn up by a reference group of major stakeholders. He has also worked with various agencies of the NT Government to inform decisions and submissions on the federal legislation environment affecting cruise shipping in Northern Australia.

Richard holds a Bachelor of Business degree from Edith Cowan University in Perth. His previous experience includes inbound operations, various roles with Tourism Australia in the US, UK and Europe, and sales and marketing management roles in private enterprise.

Thor Elliott

Treasurer

Fremantle Ports

Term expires 2015

Thor is the Trade Development Manager at Fremantle Ports. Thor has been at the Port for 28 years and has worked in a variety of areas within the port environment. Since 1995, Thor has managed Fremantle's Cruise Ship Terminal.

Thor has been pivotal in managing the elements of change to Fremantle Ports operational processes to cater for the ever expanding cruise industry as well as being heavily involved with WA Tourism in developing Western Australia's first strategic plan for cruise shipping.

Leah Clarke

Member

South Australian Tourism Commission

Term expires 2015

Leah Clarke is the Manager of the Product, Experience and Cruise Development team within the Destination Development unit of the South Australian Tourism Commission. Her role manages relationships with key access partners, tourism operators and government /private partners in South Australia, with a specific focus on identifying emerging opportunities in the areas of aviation, cruising and product/experience development.

Leah has a particular interest in increasing South Australia's market share of cruise ship arrivals and reducing impediments to access South Australian ports. Over the past four years she has been instrumental in the development and implementation of the Southern Ocean Cruising Strategy that focuses on attracting new ships to offer itineraries in and out of Adelaide, including regional port development and education.

Leah has worked for the South Australian Tourism Commission for the past 14 years with experience in the areas of business advice, product development, national tourism and business accreditation, business and operator training and has worked as an advisor for the Minister for Tourism.

Prior to working at the South Australian Tourism Commission she worked at the coalface in tourism ventures and for marketing consultants.

Tyler Wood

Member

Bob Wood Cruise Group

Term expires 2015

With over 15 years' experience in the travel industry, Tyler, along with his business partner Jay McKenzie, has created Bob Wood Cruise Group, a company dedicated to the implementation and management of professional ground logistics for international cruise lines, as well as working with tourism bodies to implement quality industry standards that cruise lines have come to expect.

A recent addition to the company is the formation of Cruise Guides Australia, created with the objective of bringing a nationwide industry standard to the guiding business focusing on the needs of the international cruise market. Tyler is looking at doing this through collaboration with his cruise line partners, STOs and the various training and education facilities within Australia.

Prior to forming Bob Wood Cruise Group, Tyler worked in the family business alongside his mentor and prior CDU Committee Member Judy Wood.

Tim Short

Member

Hobart City Council

Term expires 2014

Tim is the Group Manager, Executive and Economic Development with the City of Hobart. In this role Tim has responsibility for economic development matters for Hobart as well as management of the offices of the Lord Mayor of Hobart and the General Manager of the Council. Tim has been with the City of Hobart for 12 years. Prior to this he has been a practising lawyer and also ran a business enterprise centre undertaking business and economic development activities in regional Tasmania.



management committee meetings

John McKenna

Member

Sydney Ports Corporation

Term expires 2014

John currently manages Cruise Operations on behalf of Sydney Port Corporation. John is responsible for cruise terminal operations at the new White Bay terminal and the Overseas Passenger Terminal at Circular Quay. He works closely with the cruise lines to ensure successful operations in Australia's largest market.

John joined Sydney Ports in September 2011 after spending 12 years with the Virgin Airlines group where he held positions of Manager of International Operations and Operations Manager of Guest Services. John has worked in airports throughout the world such as London, Los Angeles, Abu Dhabi and Johannesburg after starting his career with Irish carrier Aer Lingus.

Jill Abel

General Manager

July 2013 to June 2015

HONORARY MEMBERS

Tourism Australia

Nominated December 2010

Leigh Sorensen

The Management Committee held the following meetings:

108		2 July 2013	Melbourne
109	AGM	13 September 2013	Cairns
110		27 September 2013	By Teleconference
111		5 December 2013	Sydney
112		19 February 2014	By Teleconference
113		8 May 2014	Adelaide

Attendance at Management Committee Meetings

Record of attendance at scheduled Management Committee meetings:

Member	Meetings Attended	Meetings Eligible to Attend
Chris White	5	5
David Brown	6	6
Richard Schoonraad	5	5
Thor Elliott	5	5
Tyler Wood	5	6
Leah Clarke	6	6
Anne McVilly/Tim Short	4	6
John McKenna	3	6
Glenn Stephens	2	2
Tourism Australia	3	6
Jill Abel	6	6



Sub-Committees and Portfolios

Listed below is the allocation of responsibilities for the sub-committees and portfolios for the 2013-14 year.

Committees

Management Committee – Rule 16 Focus 1, 2, 3, 4 and 5

Responsible for:

Managing administration including:

- Rules of Association
- Financial delegation
- GM's contract
- Succession planning
- Legal and property matters

Executive – (Chairman, Joint Dep. Chairmen, Treasurer)

Rule 18.1 - Management Committee may delegate powers in the absence of the full Management Committee

Focus 2 – 2014 Conference Organising Committee (Tyler Wood, Leah Clarke, Jill Abel) – Rule 18.2

Portfolios

Rule 13.9 – The portfolios of other Management Committee members shall be allocated by consensus of the Management Committee

General Manager – Jill Abel Focus 1, 2 and 3

- Secretary of the Association
- Cruise Shipping Miami Convention
- US Sales Mission
- Annual Govt/Minister's meeting
- Economic Impact Study
- Annual General Meeting
- Management Committee meetings
- Website update
- Travel Programs/Familiarisations
- Education
- General administration
- Media spokesperson

Focus 1 – Chairman (Chris White)

- Leadership
- Governance
- Political liaison
- Media spokesperson
- Cruise line liaison

Focus 1 – (Richard Schoonraad / John McKenna / Tim Short / Leah Clarke)

- Annual Operating Plan
- 3 year Strategic Plan
- Annual Report

Focus 1 – Treasurer (Thor Elliott)

- Financial management and reporting
- Budget
- Insurance

Focus 3 – Members (Leah Clarke / John McKenna)

- Communications report

Focus 4 – Members (Richard Schoonraad / Tyler Wood)

- Membership and education

2013–2014 Annual Operating Plan

Vision Develop and grow the Australia, Asia and South Pacific region (CDU) as a major world class base and destination for cruise ships. Mission Cruise Down Under (CDU) is the peak cruise industry association growing and developing the Australia/Pacific region, as one of the world's leading cruise destinations providing opportunities for ongoing economic, social and environmental sustainability. Objective To influence cruise and charter operators to develop itineraries and/or base their cruise ship visits in the CDU region. To achieve this, CDU has established five core focus areas:	Focus 1 Leadership and Governance	Focus 2 Research and Insights
	Objectives	Provide CDU members with useful, accurate and meaningful research into the cruise sector
	Priority Projects 2013–14 <ul style="list-style-type: none"> • Develop future funds strategy • Prepare annual operating plan, annual report, financial report, budget • Review governance reports e.g. business continuity plan, code of conduct • Develop strategy to recruit new external Chair for 2014-15 onwards • Prepare and submit EMDG application 	<ul style="list-style-type: none"> • Secure government funding to conduct research into the economic impact of cruising – Tourism Research Aust. • Annual cruise conference (incl. industry sessions) • Respond to Government inquiries • Miami Conference (educational component)
	Other Important Projects <ul style="list-style-type: none"> • Project CDU as the peak marketing body and primary connector of business-to-business • Continue to enhance relationships with Federal, State Governments, trade media, industry • Manage CDU's IP and maintain business integrity 	<ul style="list-style-type: none"> • Conduct passenger surveys in partnership with destinations • Maintain a comprehensive customer database • Review EIS methodology for use in destination surveys
	Key Performance Indicators (KPIs) <ul style="list-style-type: none"> • Table reports at AGM • Brief Federal Government (DRET and DIMIA), Tourism Australia and Ports Australia (educational component) minimum twice annually • Liaise/collaborate with STOs, ATEC, TTF and Ports Australia minimum twice annually • Identification of new chair candidates by AGM 	<ul style="list-style-type: none"> • Prepare and present executive summary of AEC Economic Impact Study to members and stakeholders incl. Federal and State Governments by December 2013 • Present executive summary of the AEC Economic Impact Study to the Tourism Access Working Group by December 2013 • Host 2013 cruise conference • Review communications strategy twice annually
	Key Achievements 2013–14 <ul style="list-style-type: none"> • Developed 3yr Strategic Plan 2014–2017 • A robust governance regime • Increased awareness on: <ul style="list-style-type: none"> - role and structure of CDU - the cruise industry • Updated CDU Operational Plan • Successfully obtained funds through the EMDG for work completed in 2012-13 • Succession planning for recruitment of external Chair • Productive, ongoing dialogue with CLIA to maintain united voice for industry 	<ul style="list-style-type: none"> • Released the Economic Impact Study 2012–13 • Distributed AEC's report to membership, stakeholders and Government with summary brochure and full report available • Supported 2 STOs with research projects through grant funding • Delivered successful CDU Conference in Cairns, Sept 2013, with two leading international cruise execs as keynote speakers • Conducted three industry forums in SYD, MEL and ADL

Focus 3	Focus 4	Focus 5
Position and Market the CDU region as a world class destination	Membership	Stakeholder and Partnership Development
Market and promote the CDU region as an attractive and diverse cruise destination for world class cruising	Grow membership and provide high value benefits and services to CDU members	Develop and maintain collaboration and affiliation with stakeholders and partners
<ul style="list-style-type: none"> Investigate opportunities for a trade mission with STOs and CDU members in March 2014 in collaboration with Cruise Shipping Miami Convention Participate at Cruise Shipping Miami Convention Continued review and implementation of Communications Strategy Marketing plan for 2013/14 Leverage key stakeholders' cruise sector comments Work to include a cruise ship component within relevant associations' agenda Develop and plan Mega Familiarisation Program Support Tourism Australia at select trade events (Cruise 3Sixty, etc.) 	<ul style="list-style-type: none"> Review Membership and Education strategy Identify potential new members Review membership structure and fees Review/update membership collateral/brochure 	<ul style="list-style-type: none"> Develop a stakeholder database Host stakeholder networking events Understand cruise line structures and/or contacts – e.g. business interface/connections Provide strong member representation on committees at Federal and State Govt. level
<ul style="list-style-type: none"> Produce renewed promotional collateral Arrange famils to Australia Expand media list of contacts Assist members with cruise line appointments Review website Mega Famil Planning 	<ul style="list-style-type: none"> Review communications strategy for members Rotate management meetings in different locations (educational component) Host industry sessions Brief executives including member organisations 	<ul style="list-style-type: none"> Engage with stakeholders' decision makers, Tourism Ministers, Shadow Ministers, Hon. Members Consolidate TA/DRET relationship
<ul style="list-style-type: none"> Attend Cruise Shipping Miami Convention – Meet with a minimum of 10 US cruise line executives Circulate US Sales Mission and Miami Conference reports by 30 April 2014 Develop famils for 5 cruise line executives by 30 June 2014 	<ul style="list-style-type: none"> Increase membership numbers by 5% by 30 June 2014 Circulate Member Updates 5 times annually Complete and upload YouTube by October 2013 	<ul style="list-style-type: none"> Attend Federal Govt. working committee meetings three times annually Meet with Federal Minister for Tourism once annually Circulate CDU News twice annually
<ul style="list-style-type: none"> An effective marketing program Established Mega Famil program for Sept 2014 and partnered with TA, Virgin Airlines and STOs Delivered effective communications and feedback to members, cruise lines and industry stakeholders Updated Communications Strategy Updated and launched improved CDU website Managed Australia/ NZ/SoPac regional presence at Cruise Shipping Miami with larger stand and delegate event Met with all major cruise lines at Cruise Shipping Miami conference Conducted cruise line meetings with major cruise lines in New York, Miami, Seattle and Los Angeles Attended Cruise Shipping Asia Conference in Singapore Nov 2013 Supported Tourism Australia at Cruise3Sixty event in USA Conducted Australia destination webinar in USA Refreshed and distributed CDU Newsletter, communicating cruise product and infrastructure developments to stakeholders 	<ul style="list-style-type: none"> 6 new members welcomed Increased awareness of membership benefits Produced and distributed "member benefits" video Retained current members Development of Membership and Education Strategy 	<ul style="list-style-type: none"> Increased stakeholder co-operation Understanding/awareness of stakeholders' objectives and operations Submitted response to the Federal Government inquiry into Tasmanian Shipping and Freight Submitted responses to Federal Government review of Coastal Trading Act (Revitalising Australian Shipping) 2012 Represented CDU members on the National Sea Passenger Facilitation Committee Presented at a range of tourism and port sector fora, including ATEC Symposium



project reports

Cruise Down Under Conference

The 2013 Cruise Down Under Conference was held in Cairns in September and was sponsored by Tourism Queensland, Ports North and Tropical Tourism North Queensland. The conference, themed *"Cruising Ahead in a Competitive Environment"*, attracted 126 delegates from Australia, New Zealand, Papua New Guinea, Indonesia and USA.

Keynote presentations:

- John Tercek, Vice President, Commercial and New Business Development, Royal Caribbean Cruises Ltd.
- Ellen Lynch, Director Excursions for Holland America Line and Seabourn
- Sarina Bratton, founder of Orion Expedition Cruises and Entrepreneur

Other speakers included:

- Simon Smith, AEC Group
- Peter Little, Carnival Australia
- Leigh Sorensen, Tourism Australia
- Chris Boland, Ports North
- Patricia O'Callahan, Townsville Enterprise
- Captain Philip Holliday, Sydney Ports

Cruise Shipping Miami

Cruise Shipping Miami is a key promotional event on CDU's marketing program.

In 2014 it was attended by the following members:

- Chris White (Chairman CDU) – Tourism Victoria
- Jill Abel – GM, Cruise Down Under
- Tyler Wood – Bob Wood Cruise Group
- Mark Alfano – Bob Wood Cruise Group
- Richard Schoonraad – Tourism NT
- Tony Mayell – Tourism NT
- Leah Clarke – South Australia Tourism Commission
- Richard Doyle – Sealink & Captain Cook Cruises
- David Good – Ports North
- Christine Cole – Tourism Western Australia
- Sandy Nerlich – Tourism Western Australia
- Irene Morgan – Destination NSW

The following Cruise Down Under members also had adjacent trade stands contributing to a broader regional theme:

- Peter Vincent, Simon Pih and Judith Maino – Papua New Guinea Tourism
- Jean Michel Foutrein and Beatrix Cuenot – New Caledonia Tourism South

Formal discussions were held with the following cruise lines:

- Princess Cruises
- Holland America Line
- Royal Caribbean Cruises
- Azamara
- Carnival UK
- Cunard
- Royal Celebrity Tours
- Celebrity Cruises
- Princess Tours
- Silversea Cruises
- Saga Cruise Line
- Regent Seven Seas Cruises
- Oceania Cruises
- Seabourn Cruise Line
- Paul Gaugin Cruises
- Zegrahms
- Lindblad Expeditions
- Crystal Cruises
- Viking Cruises
- Caledonian Sky



Economic Impact Study

The 2012-13 study undertaken by AECgroup continued to be funded by CDU and Tourism Australia. The study reports on both the international impacts of cruise as well as the domestic activity. The study reports a total expenditure of both international and domestic activity of \$2.88 billion in 2012-13, including direct expenditure of \$1.7 billion. This was a 23% increase from 2011-12 when total direct expenditure was estimated at \$1.3 billion. If looking solely at the international market, the total expenditure was \$2.05 billion.

The following table highlights growth trends for the period 2011-12 to 2012-13:

Comparison of Australian Cruise Ship Industry Demand Indicators

	2011-12	2012-13	Actual Change	% Change
Number of Australian ports visited by cruise ships	31	30	-1	-3.2%
Cruise Ship Characteristics				
Number of visiting cruise ships	42	43	1	2.4%
Passenger capacity of the cruise ships	54,063	62,051	7,988	14.8%
Number of crew on the cruise ships	22,997	27,032	4,035	17.5%
Cruise Ship Visits				
Number of cruise ship visits to ports	736	692	-44	-6.0%
Passengers and Crew				
Total passenger days at port	1,463,013	1,814,478	351,465	24.0%
Total crew days at port	324,656	373,104	48,448	14.9%
Expenditure				
Passengers (\$m) ^(a)	\$442.8	\$574.1	\$131.3	29.6%
Crew (\$m) ^(a)	\$55.3	\$68.2	\$12.9	23.4%
Port-related by operators (\$m)	\$733.2	\$908.3	\$175.1	23.9%
Corporate (\$m)	\$157.2	\$160.3	\$3.1	2.0%
TOTAL	\$1,388.5	\$1,710.9	\$322.4	23.2%

Note: (a) Includes both domestic and international expenditure. Some totals may not add up due to rounding issues.

Source: CDU, Individual Ports, AECgroup

Summary of Direct Expenditure associated with the Cruise Shipping Industry in Australia, 2012–13

	Visit Days	Passenger	Crew	Direct Expenditure (\$m)				
Port		Days At Port	Days At Port	Passenger(a)	Crew(a)	Operator	Corporate	Total
NSW:								
Eden	2	1,024	311	\$0.25	\$0.02	\$0.16	\$0.00	\$0.4
Newcastle	10	17,825	3,817	\$3.73	\$0.25	\$4.69	\$1.84	\$10.5
Sydney Harbour	240	970,560	185,420	\$358.72	\$42.34	\$494.42	\$129.19	\$1,024.7
Total	252	989,410	189,548	\$362.7	\$42.6	\$499.3	\$131.0	\$1,035.6
VIC:								
Geelong	1	405	167	\$0.02	\$0.01	\$0.04	\$0.00	\$0.07
Melbourne	55	119,765	27,837	\$25.37	\$2.11	\$103.49	\$3.19	\$134.17
Wilson Promontory	1	103	37	\$0.00	\$0.00	\$0.00	\$0.00	\$0.01
Total	57	120,272	28,041	\$25.40	\$2.11	\$103.53	\$3.19	\$134.24
QLD:								
Brisbane	105	324,582	65,064	\$117.17	\$14.44	\$198.50	\$19.57	\$349.7
Cairns/ Yorkeys Knob	43	44,149	12,751	\$8.90	\$0.86	\$1.79	\$0.04	\$11.6
Cooktown	2	669	0	\$0.16	\$0.00	\$0.01	\$0.00	\$0.17
Mackay/ Whitsundays	38	54,691	12,465	\$11.18	\$0.82	\$1.07	\$0.00	\$13.1
Port Douglas	18	25,156	0	\$4.70	\$0.00	\$0.11	\$0.00	\$4.8
Thursday Island	5	1,513	146	\$0.36	\$0.01	\$0.01	\$0.00	\$0.4
Townsville	4	2,813	929	\$0.58	\$0.06	\$0.30	\$0.00	\$0.9
Total	215	453,573	91,355	\$143.1	\$16.2	\$201.8	\$19.6	\$380.7
SA:								
Adelaide	12	21,039	5,531	\$5.40	\$0.88	\$0.97	\$0.39	\$7.6
Kangaroo Island	3	2,079	635	\$0.44	\$0.04	\$0.12	\$0.00	\$0.6
Port Lincoln	1	1,038	324	\$0.19	\$0.02	\$0.02	\$0.00	\$0.23
Total	16	24,156	6,490	\$6.0	\$0.9	\$1.1	\$0.4	\$8.5
WA:								
Albany	7	11,749	2,841	\$0.63	\$0.19	\$0.56	\$0.00	\$1.4
Broome	11	5,951	1,558	\$0.16	\$0.00	\$0.00	\$0.00	\$0.2
Esperance	4	6,660	1,945	\$0.36	\$0.13	\$0.39	\$0.00	\$0.9
Exmouth	2	1,926	547	\$0.06	\$0.04	\$0.11	\$0.00	\$0.2
Fremantle	17	49,846	11,969	\$16.17	\$2.47	\$37.66	\$5.95	\$62.3
Geraldton	11	16,439	4,410	\$0.53	\$0.29	\$2.15	\$0.00	\$3.0
Port Hedland	4	9,204	2,216	\$0.76	\$0.15	\$0.40	\$0.00	\$1.3
Total	56	101,776	25,486	\$18.7	\$3.3	\$41.3	\$6.0	\$69.2
TAS:								
Burnie	9	10,827	2,782	\$1.22	\$0.31	\$0.45	\$0.00	\$2.0
Hobart	38	64,625	15,518	\$7.31	\$1.73	\$2.71	\$0.00	\$11.7
Port Arthur	3	3,492	1,040	\$0.39	\$0.12	\$0.16	\$0.00	\$0.7
Total	50	78,944	19,340	\$8.9	\$2.2	\$3.3	\$0.0	\$14.4
NT:								
Darwin	41	43,007	11,994	\$8.37	\$0.78	\$57.52	\$0.15	\$66.8
Total	41	43,007	11,994	\$8.4	\$0.8	\$57.5	\$0.2	\$66.8
OVERSEAS TERRITORIES:								
Christmas Island	1	1,486	420	\$0.27	\$0.03	\$0.08	\$0.00	\$0.4
Norfolk Island	4	1,855	430	\$0.3	\$0.0	\$0.00	\$0.0	\$0.4
Total	5	3,341	850	\$0.6	\$0.1	\$0.08	\$0.0	\$0.8
Total	692	1,814,478	373,104	\$574.1	\$68.2	\$908.3	\$160.3	\$1,710.0

Note: (a) Includes both domestic and international expenditure. Some totals may not add up due to rounding issues.

Source: CDU, Individual Ports, Deloitte Access Economics (2012), AECgroup




National Economic Impacts of Cruise Shipping in Australia

Impact	International only (a)			International & Domestic (b)		
	2011-12	2012-13	Change (%)	2011-12	2012-13	Change (%)
Output (\$m)						
Direct	\$1,015.5	\$1,216.8	19.8%	\$1,388.4	\$1,710.9	23.2%
Indirect	\$688.0	\$838.3	21.8%	\$933.7	\$1,164.7	24.7%
Total	\$1,703.5	\$2,055.1	20.6%	\$2,322.1	\$2,875.6	23.8%
Wages Income (\$m)						
Direct	\$354.2	\$415.6	17.3%	\$458.1	\$558.0	21.8%
Indirect	\$168.5	\$205.1	21.8%	\$224.7	\$279.9	24.5%
Total	\$522.7	\$620.8	18.8%	\$682.8	\$837.8	22.7%
Employment (FTEs)						
Direct	3,924	4,612	17.5%	5,793	7,108	22.7%
Indirect	2,373	2,891	21.8%	3,304	4,169	26.2%
Total	6,297	7,503	19.2%	9,097	11,277	24.0%
Value Added (\$m)						
Direct	\$533.4	\$630.1	18.1%	\$705.7	\$858.8	21.7%
Indirect	\$316.2	\$385.2	21.8%	\$421.4	\$523.5	24.2%
Total	\$849.6	\$1,015.3	19.5%	\$1,127.1	\$1,382.2	22.6%

Notes: (a) International passengers & crew, operators and corporate, (b) International & domestic passengers & crew, operators and corporate.
Some totals may not add up due to rounding issues.

Source: AECgroup



Members have access to a professional body which has made significant advances in providing quality information and cruise marketing collateral.



about cruise down under

CDU History – The first 10 years that outline the formative years of the Association can be found at www.cruisedownunder.com

In the first 10 years, Cruise Down Under cemented its position as the peak marketing body for cruise tourism in this region. Through their association with CDU, members have access to a professional body which has made significant advances in providing quality information and cruise marketing collateral through its website and participation at the annual Cruise Shipping Miami Convention.

David Brown, Cruise Hunter joined the Management Committee in 2008 replacing Judy Wood from Bob Wood Travel Group. David provides input from a regional destination perspective.

In 2009 Claire Willis, Abercrombie and Kent and Leah Clarke, South Australia Tourism Commission replaced Brett Dudley and John Treacy on the Management Committee.

Chairman Richard Doyle participated on the State of the Industry panel at the 2010 Miami Cruise Convention demonstrating that CDU region had significantly matured as a key cruise destination worthy of a view on the international stage.

In April 2010 Richard Doyle resigned as Chairman of CDU following his resignation from Tourism NT. It was during Richard's chairmanship that the organisation achieved a strong position on the international stage as the key

industry body for the Australia and South Pacific region, a sound financial position, an increase in membership and a rigorous governance regime for the Management Committee.

Evda Marangos was elected Chairman in May 2010. The succession plan was implemented with the election of Chris White as Chairman at the AGM in August 2010. Richard Doyle, Doyle Tourism Services P/L joined the committee providing a second private sector representative.

In 2011, Claire Willis resigned from the committee and Tyler Wood, Bob Wood Travel was elected at the 2011 AGM in Newcastle.

In May 2012, Richard Doyle resigned from the committee to undertake his new role as Marketing Manager for Captain Cook Cruises. The committee welcomed new members at the 2012 AGM in Anne McVilly from Hobart City Council and Jason McGregor from Sydney Ports. John McKenna became the Sydney Ports representative in March of 2013. Chris White was again elected Chairman, David Brown, Deputy Chairman and Glenn Stephens, Treasurer.

Evda Marangos' term expired at the end of 2012 and the organisation recognised her tireless efforts over many years. Evda was integral to the

development of sound governance, annual operating plans and the annual report.

Glenn Stephens was recognised at the 2013 Conference when he stood down from the CDU Management Committee. Glenn had been involved with CDU since its inception and held the position of Treasurer for the entirety of his terms. Glenn's commitment to the organisation has been integral to the success of CDU.

Following the 2013 election, the new management committee, led by David Brown, identified that the incoming committee did not fulfill the skills set identified for the position of Chairman. Under rule 25.4 whereby "in the opinion of the Management Committee, the necessary skills and experience referred to above, the Management Committee may appoint at its entire discretion up to two specialist members to assist in the discharge of the functions of the Management Committee".

Chris White was invited to take on the role of Chairman for one year through to the 2014 election. In addition to providing leadership to CDU, the Chairman will work with the Committee to establish a succession plan to guide the organisation for the long term in line with CDU's strategic plan.



record of past annual general meetings and conferences

Year	Destination	No. of Attendees	Date
2013	Cairns	126	11-13 September
2012	Hobart	128	29-31 August
2011	Newcastle	108	24-26 August
2010	Brisbane	118	25-27 August
2009	Adelaide	95	26-28 August
2008	Melbourne	110	27-29 August
2007	Darwin	85	29-31 August
2006	Cairns	115	23-25 August
2005	Fremantle	49	31 August - 2 September
2004	Noumea	59 (inc CNZ)	21-22 August
2003	Launceston	42	27-28 August
2002	Adelaide	40	24-25 September
2001	Melbourne	39	28-29 August
2000	Darwin	20	18 August
1999	Sydney	27	18 August
1998	Brisbane	23	30 September
1997	Cairns	28	2-4 November

past management committees

Present and past management committees

Year	Chairman	Joint Dept. Chairman	Joint Dept. Chairman	Treasurer	Member	Member	Member	Member	Tourism Australia	General Manager
13-14	Chris White Tourism Victoria	David Brown Cruise Hunter	Richard Schoonraad Tourism NT	Thor Elliott Fremantle Ports	Leah Clarke South Australian Tourism Commission	Tyler Wood Bob Wood Cruise Group	Tim Short Hobart City Council	John McKenna Sydney Ports	Leigh Sorensen	Jill Abel

Year	Chairman	Deputy Chairman	Treasurer	Member	Member	Member	Member	Tourism Australia	General Manager
12-13	Chris White Tourism Victoria	David Brown Cruise Hunter	Glenn Stephens Fremantle Ports	Leah Clarke South Australian Tourism Commission	Tyler Wood Bob Wood Cruise Group	Anne McVilly Hobart City Council	Jason McGregor/John McKenna Sydney Ports	Leigh Sorensen Tourism Australia	Jill Abel

Note: Anne McVilly was replaced by Tim Short on the 30 June due to change of employment.

Note: John McKenna replaced Jason McGregor in March 2013 due to change of employment.

Year	Chairman	Deputy Chairman	Treasurer	Member	Member	Member	Member	Tourism Australia	General Manager
11-12	Chris White Tourism Victoria	David Brown Cruise Hunter	Glenn Stephens Fremantle Ports	Evda Marangos Port of Melbourne Corporation	Leah Clarke South Australian Tourism Commission	Tyler Wood Bob Wood Cruise Group	Richard Doyle Doyle Tourism Services	Leigh Sorensen Tourism Australia	Jill Abel

Note: Richard Doyle stepped down as of 30 May 2012 and the position remained vacant until the 2012-13 elections.

Year	Chairman	Deputy Chairman	Treasurer	Member	Member	Member	Member	Tourism Australia	General Manager
10-11	Chris White Tourism Victoria	Evda Marangos Port of Melbourne Corporation	Glenn Stephens Fremantle Ports	David Brown Cruise Hunter	Leah Clarke South Australian Tourism Commission	Claire Willis Abercrombie & Kent	Richard Doyle Doyle Tourism Services	Leigh Sorensen	Jill Abel

Year	Chairman	Deputy Chairman	Treasurer	Member	Member	Member	Member	Tourism Australia	General Manager
09-10	Evda Marangos Port of Melbourne Corporation	Chris White Tourism Victoria	Glenn Stephens Fremantle Ports	David Brown Cruise Hunter	Mark Crummy Tourism NT	Claire Willis Abercrombie & Kent	Leah Clarke South Australian Tourism Commission	Matthew Cameron-Smith	Jill Abel

Note: The following positions were held until the resignation of the Chairman on 30 April 2010 when the Management Committee elected a new Chairman and Deputy Chairman: Richard Doyle, Tourism NT – Chairman until 30 April 2010. Evda Marangos, Port of Melbourne Corporation – Deputy Chairman until 1 May 2010. Chris White, Tourism Victoria – Member until 17 May 2010

Year	Chairman	Deputy Chairman	Treasurer	Member	Member	Member	Member	Tourism Australia	General Manager
08-09	Richard Doyle Tourism NT	Brett Dudley ecruising.com	Glenn Stephens Fremantle Ports	Evda Marangos Port of Melbourne Corporation	David Brown Cruise Hunter	Chris White Tourism Victoria	John Treacy & Associates Pty Ltd.	Dawn Howell	Jill Abel

Prof. Ross Dowling, Academic Advisor to the Chairman since December 2005.

Past Management Committees – 1997–98 and 2007–08 refer to www.cruisedownunder.com



members' register

CDU registered 78 members as at 30 June 2014:

Name	Person	Level	Member Since
Ports Australia	David Anderson	Honorary	2005
AAT Kings	Fleur Ulbrick	Bronze	2005
Abercrombie & Kent	Toby Biddick	Silver	2002
Accor	Neale Herridge	Silver	2013
ACG Security	Lee Passmore	Silver	2012
Australian Pacific Touring	Rob Tandy	Bronze	2007
Australian Reef Pilots	Alan Maffina	Silver	1999
Australian Shipping Supplies	Richard Fader	Bronze	2006
Australian Shoreside Management	Susan Hamilton	Silver	2009
Bob Wood Cruise Group	Tyler Wood	Silver	1998
Bridgeclimb	Lyndell Clancy	Bronze	2013
Brisbane Cruise Wharf	Lee Butterworth	Platinum	2004
Bunbury Cruise Ship Committee	Mark Exeter	Silver	2013
Burnie City Council	Kate Reilly	Gold	1998
Captain Cook Cruises (WA)	Graeme Skeggs	Bronze	2011
Carnival Australia	Paul Mifsud	Silver	2006
Chart Management Consultants	Ted Blamey	Bronze	2011
Christmas Island Tourism Association	Linda Cash	Silver	2008
City of Fremantle	Donna Burgess	Silver	2008
City of Greater Geelong	Brett Ince	Bronze	2001
City of Melbourne	Barry Mguren	Bronze	2014
Cruise Eden	Gail Ward	Silver	2001
Cruise Hunter	David Brown	Gold	2001
Darwin Port Corporation	Terry O'Connor	Platinum	1995
Dept Resource Energy & Tourism	Helen Cox	Honorary	1993
Destination NSW	Eileen Gilliland	Platinum	1995
Devonport City Council	Stuart Jones	Bronze	2012
DTESB - Queensland	Mark Jones	Bronze	2003
Fergusson Winery	Louise Fergusson	Bronze	2012
Flinders Ports	Carl Kavina	Platinum	2009
Fremantle Port	Thor Elliott	Platinum	1995
Geraldton Port Authority	Martin North	Gold	2007
Glenelg Shire Council	Neil Burgess	Bronze	2010
Great Southern Rail	Damien Wolff	Silver	2011
Holland America Line	Tony Archbold	Silver	2012
Indonesia, Ministry of Culture and Tourism	Rizha Handayani	Platinum	2009



Name	Person	Level	Member Since
Intercruises Shoreside and Port Services	Martin Bidgood	Silver	2011
Kuranda Scenic Railway	Ivana Andacic-Tong	Bronze	2008
Mantra Group	Judd Rabbidge	Bronze	2013
Mike Bartlett	Mike Bartlett	Honorary	2007
Moonshadow Cruises & Port Stephens 4WD	Janene Rees	Bronze	2010
New Caledonia Tourism - South Noumea	Jean Michel Foutrein	Platinum	2001
Papua New Guinea Tourism	Alcinda Trawen	Platinum	2005
Peddells Thursday Island Tours	Matt Connor	Bronze	2013
Port Arthur Historic Site	Andrew Ross	Gold	2007
Port of Broome	Capt. Vic Justice	Gold	1999
Port of Melbourne Corporation	Evda Marangos	Platinum	2005
Port of Portland	Malcolm Geier	Silver	2007
Port of Townsville Ltd.	Ranee Crosby	Gold	2002
Ports North	Kerry Egerton	Platinum	1993
Reef Magic Cruises	Jeff Cameron-Smith	Bronze	2013
Rotor-Lift Aviation	Greg Ross	Bronze	2012
Royal Botanic Gardens	Robyn Merrett	Bronze	2008
Royal Caribbean International	Gavin Smith	Silver	2008
Sealink Travel Group and Captain Cook Cruises	Richard Doyle	Silver	2012
Skyrail Rainforest Cableway	Marni Barnett	Bronze	2011
Sofitel Sydney Wentworth	Geoffrey Webb	Silver	2012
South Australian Tourism Commission	Leah Clarke	Platinum	1998
Southern Cross Shipping	Jason Drury	Silver	2012
Sunlover Reef Cruises	Alex Blake	Bronze	2013
Sydney Ports Corporation	John McKenna	Platinum	1993
Tasmanian Travel & Information Centre/Hobart City Council	Tim Short	Bronze	2009
Tasports - Burnie/Devonport/Launceston	Kristy Little	Gold	1993
Tasports - Hobart	Kristy Little	Platinum	1993
The Australian Opal and Diamond Collection	Joseph Dimasi	Bronze	2002
The National Opal Collection	Damien Cody	Bronze	2012
Thompson Clarke	Chris Raley	Bronze	2005
Tjapukai Aboriginal Cultural Park	Saskia Wrobluskie	Bronze	2014
Tourism and Events Queensland	Julie O'Brien	Platinum	1994
Tourism Australia	Leigh Sorensen	Honorary	1993
Tourism NT	Richard Schoonraad	Platinum	1998
Tourism Tasmania	Rita Warrenner	Platinum	1998
Tourism Tropical North Queensland	Brian Hennessy	Gold	2008



Name	Person	Level	Member Since
Tourism Victoria	Chris White	Platinum	1998
Tourism Western Australia	Christine Cole	Platinum	1998
Townsville Enterprise	Patricia O'Callaghan	Silver	1998
Victoria Star Cruises	Tim Ryan	Bronze	2008
Whitsundays Marketing & Development	Danial Rochford	Gold	2013

Note: Members listed prior to 1998 were organisations operating as a cruise committee. This committee was affiliated with the Cruising Down Under brand as administered at the time by the Australian Tourist Commission.

The Management Committee endorsed the following new members during 2013-14:

- Accor
- City of Melbourne
- Peddells Thursday Island Tours
- Reef Magic Cruises
- Sunlover Reef Cruises
- Tjapukai Aboriginal Cultural Park

The Management Committee accepted no resignations during 2013-14.



acknowledgements

Cruise Down Under acknowledges the following organisations for their in-kind support, including making available resources and facilities which enabled the Management Committee to conduct its regular meetings during 2013–14.

- Bob Wood Cruise Group
- Fremantle Ports
- Hobart City Council
- Newcastle Port Corporation
- South Australia Tourism Commission
- Sydney Ports Corporation
- Tourism Australia
- Tourism NT
- Tourism Victoria




Tourism Victoria



Government
of South Australia





annual financial report for the year ended 30 June 2014

Income Statement	40
Balance Sheet	41
Notes to the Financial Statements	42
Statement by Members of the Committee	44
Auditor's Report	45



Income Statement

For the year ended 30 June 2014

	Notes	2014 \$	2013 \$
Income			
Grants Received		73,026	58,943
Conference Sponsorship		18,500	54,878
Interest Received		22,155	24,449
		113,681	138,270
Other Income			
Conference		81,372	95,610
Membership Fees		197,547	178,283
Other Income		0	1,326
		278,919	272,219
Total Income		392,600	413,489
Expenses			
Audit Accounting Assistance		1,800	2,800
Administration		56,002	45,069
Annual Reports		6,074	6,074
Bank Charges		1,349	1,028
Committee Travel		8,059	6,711
Conference Expenses		88,041	128,480
EIS Consultants		9,896	8,800
EMDG Consultant		5,303	3,894
Insurance		3,878	3,859
Marketing		165,280	149,295
Venue Hire		5,955	10,240
Other Expenses		6,987	24,644
Printing & Stationery		5,827	6,411
Sub Contractors		25,000	15,000
Subscriptions		688	726
Telephone		3,674	3,258
Travelling Expenses		3,205	7,520
Travelling Expenses - Overseas		24,663	17,952
		421,681	441,761
(Deficit / Surplus) from ordinary activities		(29,081)	(28,272)
Total Member Funds		548,345	577,426

The accompanying Notes form part of these financial statements.

Statement of Financial Position

For the year ended 30 June 2014

	Notes	2014 \$	2013 \$
Assets			
Current Assets			
Cash and Cash Equivalents	2	718,966	693,067
Trade and Other Receivables	3	19,004	45,489
Total Current Assets		737,970	738,556
Total Assets		737,970	738,556
Liabilities			
Current Liabilities			
Trade and Other Payables	4	189,625	161,130
Total Current Liabilities		189,625	161,130
Total Liabilities		189,625	161,130
Net Assets		548,345	577,426
Equity			
Retained Surpluses	5	548,345	577,426
Total Equity		548,345	577,426
Commitments & Contingent Liabilities		Nil	Nil

The accompanying Notes form part of these financial statements.

Notes to the Financial Statements

For the year ended 30 June 2014

1 Summary of Significant Accounting Policies

(a) Basis of Accounting

This financial report is a special purpose financial report prepared in order to satisfy the financial reporting requirements of the Associations Incorporation Act (TAS) 1964 and to report to the management and to providers of funding generally, as appropriate.

The management committee has determined that Cruise Down Under Inc. is not a reporting entity as defined in Statement of Accounting Concepts 1: Definition of the Reporting Entity, and therefore there is no requirement to apply accounting standards and other mandatory professional reporting requirements in preparation and presentation of these statements and none have been intentionally adopted.

The financial report has been prepared on an accrual basis and is based on historic costs and does not take into account changing money values, or except where specifically stated, current valuation of non-current assets.

The following material accounting policies, which are consistent with the previous period unless otherwise stated, have been adopted in the preparation of this financial report.

(b) Cash and Cash Equivalents

Operating transactions and the financial statements are all cash based. Investment activities are confined to term deposits with the Association's Bankers.

Because the source of these transactions is limited to cash a Statement of Cash Flows is not included in these Financial Statements.

(c) Trade and Other Receivables

Trade receivables are recognised and carried at original invoice amount less any provision for doubtful debts. A provision for doubtful debts is recognised when collection of the full amount is no longer probable. Bad debts are written off as incurred.

(d) Trade and Other Payables

Liabilities for trade creditors and other amounts are carried at cost which is the fair value of the consideration to be paid in the future of goods and services received whether or not billed to the Association.

(e) Income Tax

The Association is exempt from income taxation under section 50-50 of the *Income Tax Assessment Act 1997*, formerly sub paragraph 23(e) of the *Income Tax Assessment Act 1936*, and therefore no provision has been made for income tax.

Notes to the Financial Statements

For the year ended 30 June 2014

	Notes	2014 \$	2013 \$
2 Cash and Cash Equivalents			
Cash at bank and on hand		239,461	197,969
Bank short term assets – Deposits		479,505	495,098
		718,966	693,067
3 Trade and Other Receivables			
Prepayments		18,025	45,133
GST receivables		979	356
		19,004	45,489
4 Trade and Other Payables			
Subscriptions in Advance		114,476	142,646
Other amounts received in Advance		75,149	18,484
		189,625	161,130
5 Equity			
Retained Surpluses 1 July 2013		577,426	605,698
Deficit of income over expenditure		(29,081)	(28,272)
Retained Surpluses 30 June 2014		548,345	577,426

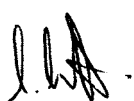
Statement by Members of the Committee

The committee has determined that the association is not a reporting entity and that this special purpose financial report should be prepared in accordance with the accounting policies outlined in Note 1 to the financial statements.

In the opinion of the committee the financial report as set out on pages 39 to 43:

1. Presents a true and fair view of the financial position of Cruise Down Under as at the end of June 2014 and its performance for the year ended on that date.
2. At the date of this statement, there are reasonable grounds to believe that Cruise Down Under will be able to pay its debts as and when they fall due.

This statement is made in accordance with a resolution of the Committee and is signed for and on behalf of the Committee by:



Chairman



Treasurer

Dated this 8th day of August 2014

KEVIN GUMLEY Chartered Accountant

36 Norfolk Crescent
SANDY BAY TAS 7005
Phone 03 6225 3252 Mobile 0418 349 690
Email kmgumley@bigpond.net.au
abn 62 093 900 121

INDEPENDENT AUDITORS REPORT TO THE MEMBERS OF CRUISE DOWN UNDER INCORPORATED

Report on the Financial Report

I have audited the accompanying financial report, being a special purpose financial report, of Cruise Down Under Incorporated (the association), which comprises the balance sheet as at 30 June 2014, and the income statement, for the year then ended, a summary of significant accounting policies and other explanatory notes and the Statement by Members of The Management Committee.

The Management Committee's Responsibility for the Financial Report

The Management Committee is responsible for the preparation and fair presentation of the financial report and has determined that the accounting policies described in Note 1 to the financial statements which form part of the financial report are consistent with the financial reporting requirements of The Associations Incorporations Act (Tas) 1964 and are appropriate to meet the needs of the members. The Management Committee's responsibility also includes establishing and maintaining internal controls relevant to the preparation and fair presentation of the financial report that is free from material misstatement, whether due to fraud or error; selecting and applying appropriate accounting policies; and making accounting estimates that are reasonable in the circumstances.

Auditor's Responsibility

My responsibility is to express an opinion on the financial report based on my audit. No opinion is expressed as to whether the accounting policies used, as described in Note 1, are appropriate to meet the needs of the members. I conducted the audit in accordance with Australian Auditing Standards. These Auditing Standards require that I comply with relevant ethical requirements relating to audit engagements and plan and perform the audit to obtain reasonable assurance whether the financial report is free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial report. The procedures selected depend on the auditor's judgement, including the assessment of the risks of material misstatement of the financial report, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial report in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of accounting estimates made by the Management Committee, as well as evaluating the overall presentation of the financial report.

The financial report has been prepared for distribution to members for the purpose of fulfilling the Management Committee's financial reporting under The Associations Incorporations Act (Tas.) 1964. I disclaim any assumption of responsibility for any reliance on this report or on the financial report to which it relates to any person other than the members, or for any purpose other than that for which it was prepared.



Chartered Accountant

I believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for my audit opinion.

Independence

In conducting my audit, I have complied with the independence requirements of the Australian professional accounting bodies.

Auditor's Opinion

In my opinion, the financial report presents fairly, in all material respects, the financial position of Cruise Down Under Incorporated as of 30 June 2014 and its financial performance for the year then ended in accordance with the accounting policies described in Note 1 to the financial statements.



Kevin Gumley
Chartered Accountant
36 Norfolk Crescent
Sandy Bay TAS
Dated this 8th day of September 2014



ADELAIDE BATEMANS BAY BRISBANE BROOME BURNIE CAIRNS CHRISTMAS ISLAND DARWIN DEVONPORT EDEN FREMANTLE
GEELONG GERALDTON KANGAROO ISLAND HOBART INDONESIA LAUNCESTON MELBOURNE NEWCASTLE NEW CALEDONIA
PAPUA NEW GUINEA PORT ARTHUR PORT LINCOLN PORTLAND SYDNEY TOWNSVILLE PLUS SMALLER DESTINATIONS



Marketing CDU cruise destinations and providers of services to the cruise industry.

For further information or advice we invite you to contact:

Jill Abel, General Manager

Cruise Down Under

t +61 3 6223 7334 **f** +61 3 6223 7334

e cdu@cruisedownunder.com

www.cruisedownunder.com

PO Box 1117 Sandy Bay Tasmania 7006 Australia

CDU recognises and thanks all artists and photographers for supplying images.