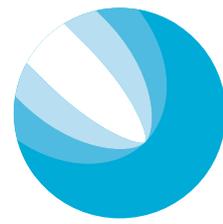




annual report
2014 **2015**



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Message from the Chair

Dear Member

I am pleased to present the Annual Report for Cruise Down Under for the period 1 July 2014 to 30 June 2015.

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

Having commenced my position as the inaugural independent (non member) Chairman in September of 2014, I am pleased to report that the organisation continues to provide strong leadership, promoting cruise sector growth and delivery of quality experiences, and present clear objectives to its membership.

Our strategies focus on delivering strong initiatives to further develop international passenger growth as well as maximising opportunities the cruise industry presents on the domestic front as it continues to expand and develop into new markets. The extraordinary growth projections for the China/Asia market, along with further growth from traditional markets, are resulting in positive cruise line deployment decisions for Australia and our region.

Cruise Down Under continues to maintain its pre-eminent position across 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.

Our significant achievements in 2014-15 were:

- Welcomed 4 new members to CDU;
- Delivered a successful CDU Conference in Perth in September 2014, with three leading international cruise executives as keynote speakers;
- Exhibited at Cruise Shipping Miami 2015;
- Conducted cruise line meetings in London, Miami, Los Angeles and Seattle;
- Co-ordinated training of 180 reservation staff on the shore excursion opportunities and pre and post cruise touring options;
- Funded three Cruise Research Projects;
- Delivered the 10th consecutive, independent report into the economic benefits of the cruise industry in Australia;
- Provided input and formal submissions to the Morrison Review (joint review of border fees, charges and taxes) and follow up regarding the review of the Coastal Trading Act;
- Engaged with federal politicians and successfully obtained federal funds through the Export Marketing Development Grant;
- Supported Tourism Australia at the Cruise 360 Event;
- Presented at a range of tourism and port sector forums.

I wish to recognise and thank the Fremantle Ports, Tourism Northern Territory, South Australian Tourism Commission, Bob Wood Cruise Group, Port Authority of New South Wales, Port Arthur Historic Site, and Tourism and Events Queensland for their support of CDU. Each organisation nominated a member of staff to be represented 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 Chief Executive Officer (CEO) throughout the year.

I would like to extend my thanks to Jill Abel, CDU's CEO who has been responsible for the implementation of the Annual Operating Plan and also congratulate her on her promotion to CEO during the year. Jill's knowledge, experience and commitment is greatly appreciated by the Management Committee and members.

Finally, I thank all CDU members for your continued support over the past year.

Yours sincerely



Stephen Bradford
Chairman
30 June 2015



Cruise Down Under (CDU) is a non-profit incorporated association formed in 1998. Members include Australian ports, state/territory and regional tourism organisations, cruise lines, shipping agents, inbound tour operators and other enterprises with commercial interests in the cruise shipping industry in Australia.

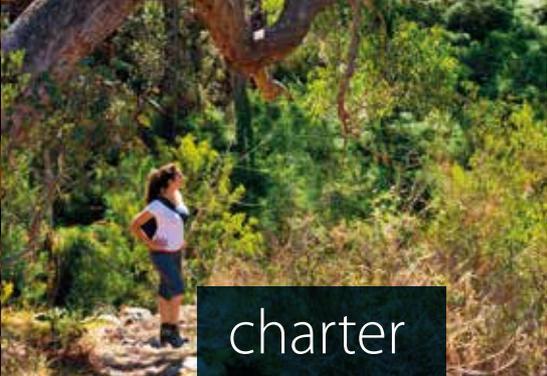
CDU is the key industry body charged with marketing Australia as a desirable, accessible and profitable destination to the cruise industry on the international stage. We also fulfil a leading role representing the interests of the wider cruise shipping industry to ensure a productive, collaborative approach to sustainable growth.



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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.



charter



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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.

Objectives

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 and representing the cruise industry.

Research and Insight

- Provide CDU members with useful, accurate and meaningful research into the cruise sector.

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 value benefits and services to members.

Stakeholder and Partnership Development

- Develop and maintain collaboration and affiliation with stakeholders and partners.



chief executive officer's report

It has been another exciting year for cruising in Australia. The number of visitors choosing Australia as a destination and cruising as their travel mode continues to grow.

We welcomed 4 new members to the association and continued to work with our entire membership base to deliver strong industry knowledge, support and representation. We held industry forums in Melbourne, Sydney and Brisbane that enabled us to provide education and networks to a broad range of stakeholders.

Our key activities and achievements for 2014-15 are as follows:

Leadership and Governance

CDU continued to be represented on the National Sea Passenger Facilitation Committee. We provided support at a range of State and Federal Government initiatives as well as making submissions into policy reform on behalf of all our members.

Research and Insights

The 2014 Cruise Down Under Conference, titled "Navigating new destinations", was held in Perth from the 3-5 September. Hosted by Tourism WA, Fremantle Ports and City of Fremantle, the conference attracted 124 delegates from Australia, New Zealand, Papua New Guinea, Indonesia, United Kingdom and USA.

Keynote speakers included Colleen Crisp, Contracts Manager – Air & Land Services, Fred. Olsen Cruise Lines; Crystal Morgan, Director Deployment Planning, Princess Cruises; and Steven Young, Head of Port Operations, Carnival UK.

The conference addressed the current industry trends and discussed the future development opportunities beyond the traditional gateway ports. A range of local experts complemented the program in panel and workshop sessions.

CDU delivered the 10th consecutive report into the economic impact of cruise in Australia. The report continues to be a major project for CDU and provides the longest standing, independent report into the cruise sector for stakeholder reference.

The 2013-14 season results were released at the CDU Conference in September 2014, reporting yet another year of industry growth. The study reports a total expenditure, from both international and domestic activity, of \$3.16 billion in 2013-14, including direct expenditure of \$1.85 billion. This was a 15.8% increase from 2012-13 when total direct expenditure was estimated at \$1.6 billion. If looking solely at the international market, the total expenditure was \$2.16 billion.

The findings of the 2014-15 year will be presented at the 2015 Cruise Down Under Conference in Darwin.

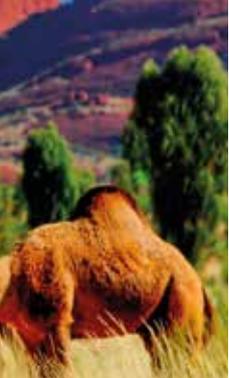
Marketing

CDU continued to actively promote opportunities the destination and CDU members offer to cruise lines on a year-round basis for both home porting and seasonal deployments.

The committee further developed its communication strategy and engaged external support to strengthen the awareness of CDU and promote members and their services on a global platform.

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

The Chairman and General Manager led a CDU delegation at the Cruise Shipping Miami Convention and held stakeholder meetings over the three day event. The expanded stand continued to provide a successful working area for key meetings and promotional activities. The combined "Down Under BBQ" with Cruise New Zealand continues to build momentum and now features in most of our key stakeholder plans for the event.



The CDU team attended a range of industry events throughout the week including Porthole Cruise Magazine, World's Leading Ground Handlers, Intercruises and Women in Cruise Breakfast.

In addition to the Cruise Shipping Miami event, CDU was represented by Richard Schoonraad and Chris White on a cruise line training mission in London, Los Angeles, New York and Seattle. Richard and Chris trained 180 reservation staff on the shore excursion opportunities around Australia as well as pre and post cruise touring options. A comprehensive PowerPoint presentation was created by CDU with the assistance of the state tourism organisations.

Unfortunately the Seatrade Cruise Asia event, due to take place in Busan,

Korea from 11-12 June, was postponed. With a growing emphasis on the region and the future opportunities for our region, CDU will build its representation at this event.

Growing Membership

The Management Committee continued its commitment to engage with members and industry around Australia. The committee met in Melbourne, Sydney, Brisbane and Perth in the past year.

Industry forums were held in conjunction with the meetings, providing additional support to members.

The strong work delivered by the Management Committee resulted in four new members joining CDU.

Stakeholder and Partnership Development

The Chairman and I travelled to Canberra in March to meet with a range of government and industry stakeholders. The meetings were most successful in highlighting the industry opportunities and maintaining focus on policy to encourage future growth.

We continued to work with Cruise Lines International Association (CLIA) to ensure clear and consistent messaging, supporting all areas of the industry.

The Management Committee continue to support the CEO role with clear strategic vision and I am confident in our ongoing goals of driving demand for cruising in Australia, enhancing delivery of experiences and securing successful economic outcomes for the region.

A handwritten signature in blue ink that reads "J. Abel".

Jill Abel
Chief Executive Officer



cruise shipping overview

A team of CDU members attended the Cruise Shipping Miami Exhibition and Conference in March of 2015. The “State of the Industry” opening session provided a good overview of the challenges of the past year and the future projections and directions.

Global Cruising

The outlook for the cruise industry continues to be strong, with the Chinese market in particular being identified by all cruise lines as the biggest opportunity both as a destination and as a source market. The major cruise lines are increasing the number of ships deployed to China and the North Asian region.

A summary of the global cruise industry:

- The industry grew at more than 5% in 2014;
- 22.1 million passengers travelled in 2014 (exceeding the expectation of 21.7 million);
- The number of passengers has increased by 5 million in the last six years;
- Projecting 23 million passengers in 2015;
- More than 400 ships sailing globally;
- By 2020, 55 new ships will enter the industry with many of those ships to be deployed in the Asia Pacific region;
- China and Cuba have been identified as the market with the greatest future potential;
- The Chinese market (having grown 20% in the past year) is demanding

newer, larger ships and the cruise lines have responded accordingly, with all cruise lines taking the youngest ships in their fleet to China;

- The average cruiser is now 49 years old, married, employed with a college education and earning around \$114,000 per annum;
- Emphasis on improved technology continues to be essential;
- Theory on millennials (born 1990-2000) “Get them once, own them for life”;
- The global deployment of cruise ships is as follows: Caribbean - 36%; Europe - 31%; Australia/New Zealand and the South Pacific - 6%; Asia - 6%; Alaska - 5%; Other - 20%. Australasia represents the strongest growth at 12% over the past year;
- Global market trends: the US economy is growing, with unemployment dropping, interest rates remaining low, and lower oil prices ensuring that Americans have more disposable incomes. Americans are once again travelling in greater numbers. The European markets are showing some resilience;
- Cruise lines to focus on policies around: revised waste management; reduced air emissions; advanced wastewater treatment systems.

National and Regional Cruising

There are now over one million Australians taking a cruise each year, somewhere in the world. The attraction of value for money, ease of travel and endless experiences continue to drive the travel consumer to cruising.

The growth in the Chinese market is demanding newer and larger ships join their fleets and this represents enormous opportunities for Australia as the cruise deployment seasons in both regions is complementary. The experiences of modern ships will make cruising in Australian waters even more enticing.

The expedition and luxury cruise markets continue to explore the Australian coast lines, attracting both domestic and international, high-yielding passengers.

Cruise Lines International Association (CLIA) reported that Australian cruise passenger numbers surged by 20.4% to reach an all-time high of 1,003,256 in 2014, compared to 833,348 in 2013. Australia’s growth rate continued to rank Australia as one of the leading source markets in the world behind the USA, Germany and UK.



The greatest challenge for Australia continues to be infrastructure and berth availability, especially during peak periods. This constraint is no longer restricted to Sydney as it spreads to Brisbane and Melbourne.

STATE REPORTS

NEW SOUTH WALES

New South Wales continues to grow as a major international cruise destination welcoming 290 cruise ship visits to Sydney and the regional ports of Newcastle and Eden in 2014-15.

Sydney continues to break records and lead the way in growing visitation. Port Authority of NSW latest figures estimate Sydney hosting 278 cruise ships in 2014-15 resulting in 291 cruise ship days in port. This is up 6.5% on the 2013-14 season with the city once again demonstrating its strength, popularity and pre-eminence as a cruise destination.

With the completion of the multi-level upgrade to the Overseas Passenger Terminal, Sydney now boasts two world class cruise facilities; Circular Quay is able to accommodate the world's largest cruise ships whilst the award winning purpose-built White Bay cruise terminal offers two berths to visiting ships as well as all-year-round cruising.

Sydney remains a 'bucket list' destination on world cruise itineraries and 2015-16 is set to be another bumper year. There are 299 ships already booked for the season, eight

of which did not visit in 2014-15. These include the *Costa Luminosa*, *Golden Princess*, *Pacific Aria*, *Pacific Eden*, *Explorer of the Seas*, *Superstar Virgo*, *Azamara Quest*, and *Pacific Venus*.

In December 2016, Sydney will welcome Royal Caribbean's newest Quantum class liner, *Ovation of the Seas*, as it takes up residence in its home port. Carrying around 5,000 passengers and 1,500 crew, *Ovation* will be the largest cruise ship to ever sail out of Australia, as well as being the most technologically advanced vessel in the region.

New South Wales' ports of Newcastle and Eden also experienced a successful cruise season during 2014-15. These regional ports play an important role in providing visitors with access to diverse local attractions as well as a range of destinations and experiences in surrounding areas.

Newcastle welcomed nine visits during the 2014-15 cruise season, delivering nearly 20,000 visitors to the Newcastle and Hunter Region. The highlight of the season was the Port's record hosting of three cruise liners in one week: P&O's *Pacific Dawn*, Royal Caribbean's 317 metre long *Celebrity Solstice* and the *Rhapsody of the Seas*. With ten ships already booked for the 2015-16 season there is a growing interest in the experiences offered across the region. 2015-16 will see five maiden visits to Newcastle including the *Pacific Jewel*, *Pacific Aria*, *Azamara Quest*, *Queen Elizabeth* and *Insighnia*.

The Port of Eden played host to three cruise ships in 2014-15 and will see this

number significantly increase in 2015-16 with nine cruise ships already booked to call. Five ships will undertake maiden visits including the *Pacific Dawn*, *Pacific Jewel*, *M.S. Marina* and *Nordam* while P&O's *Pacific Eden* will meet her namesake during its maiden visit to the port in January 2016.

Strategically placed halfway between Sydney and Melbourne, Eden's growth as a cruise destination is likely to continue. The port's \$15 million wharf extension, due for completion by mid-2017, will help facilitate and accommodate growing interest from the cruise industry in the pristine Sapphire Coast.

NORTHERN TERRITORY

Australia's Northern Territory has welcomed around 65,000 passengers and crew on 36 cruise ship visits to the Port of Darwin, and one visit to Yirrkala in East Arnhem Land. 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 the 2014-15 cruise season was our inaugural Cruise Week, held to celebrate the arrival of six ships over the five days 2-6 March. This week of record cruise ship visits included *Arcadia*, *Queen Mary 2*, *L'Austral*, *Celebrity Solstice*, *Seabourn Odyssey* and *Radiance of the Seas*. The team at Darwin Port Corporation worked tirelessly to ensure smooth operations for all visitors through the port – this was the busiest week on record for cruise ship passenger arrivals.



cruise shipping overview

Tourism NT worked closely with the City of Darwin, the Darwin Waterfront Corporation and Darwin Waterfront and City Retailers Association to deliver a series of events to welcome around 10,000 passengers throughout Cruise Week. These included craft markets at the Waterfront; musical performances in the Smith St Mall; and a point of sale campaign with local retailers enticing visitors to "Cruise in for a great deal". Tourism Top End co-ordinated an army of meet and greet volunteers at the Cruise Ship Terminal. Passenger feedback has been fantastic with many visitors commenting on the festival-like atmosphere created. Tourism NT will be encouraging local stakeholders to ensure activities continue for the 2015-16 season.

Yirrkala, an Aboriginal community located south of Nhulunbuy (Gove) on the NT's far east coast, welcomed Ponant's *LAustral* for a visit on 2 March. Passengers arrived on the beach on a fleet of Zodiacs to be greeted with a traditional Welcome to Country by the local Yolgnu people. Passengers were encouraged to mingle with locals and learn more about their traditions and ancient culture, and had the opportunity to try their hand at weaving, spear throwing and exploring the local art centre, Buku Larrngay.

Interest in East Arnhem Land has ramped up for cruise ships traversing Australia's northern coastline.



While it is ideal for expedition cruise vessels, Tourism NT is working with the community on the ground in Nhulunbuy and other NT government agencies to develop opportunities for larger visiting cruise ships. Tourism NT is also working to develop infrastructure and shore excursions on the Tiwi Islands, located 70km north of Darwin.

The Jumping Crocodiles remain the most popular shore excursion, followed by WWII Heritage tours to the Darwin Military Museum, Darwin Harbour cruises, Litchfield and Kakadu National Parks, the Territory Wildlife Park and the NT Museum and Art Gallery. The George Brown Botanical Gardens, Australian

Aviation Heritage Centre, Segway Tours, and Darwin Explorer Hop-on Hop-off bus have emerged as popular new shore excursion products. The NT Government is investing around \$2 million on infrastructure improvements at the Waterfront in 2015-16, including covering the walkway between the Darwin Cruise Ship Terminal and the Waterfront Precinct.

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



QUEENSLAND

Queensland again recorded a bumper year for cruise ship visits with double digit growth being reported for another year. Queensland's nine cruise ship destinations will be increased to eleven in the coming year, offering an unprecedented variety of experiences for cruise passengers.

P&O's *Pacific Dawn* continued to home-port in Brisbane, and visited the port 49 times during the year. Both Princess and Royal Caribbean Cruise Lines announced further home-porting for Brisbane for later in 2015, and a further announcement was that Cairns will host its much anticipated home-ported vessel in late 2016.

Moreton Island increased visitation from P&O's ships during the past year and new ports of call were announced by P&O. Gladstone and Maroochydore will welcome their first calls during the coming year. These new destinations will offer a wide range of unique shore excursions for predominantly domestic passengers, including the iconic Eumundi Markets, the famous Sunshine Coast beaches and the well kept secrets of the Southern Great Barrier Reef.

Thursday Island increased visitation from expedition-sized ships this year, proving the unique location and natural wonder of the surrounding reefs as a great attraction for international passengers.

Whitsundays, with its two destinations, Airlie Beach and Hamilton Island, offered their warm welcome, for which they are famous, to a record number of cruise passengers.

The focus for Tourism and Events Queensland for the coming twelve months is to ensure continued growth in both metropolitan and regional destinations and the continual evolution of the shore excursion and destination offerings to meet the needs of the consumer.

SOUTH AUSTRALIA

South Australia hosted a very successful cruise ship season from October to March, with 32 cruise ship visits to Adelaide and the regional ports of Kangaroo Island and Port Lincoln. For the sixth year in succession, the *Queen Mary 2* visited Adelaide as part of her circumnavigation of Australia and even after seven visits over six years, the *Queen Mary 2* coming into town still attracts large crowds of spectators as she sails into port.

Adelaide continues to attract the largest ships sailing Australian waters including *Celebrity Solstice* and *Voyager of the Seas* along with an overnight visit in Adelaide by the *Amsterdam*.

The South Australian Tourism Commission (SATC) continues its focus on developing infrastructure, services and products in all South Australian ports. Over the past twelve months, the SATC has invested in a new second gangway at the Port Adelaide Passenger Terminal and has provided

fender availability on the wharf which now increases our capabilities to effectively manage the growing number of passengers embarking and disembarking cruise ships in Adelaide. The Port Adelaide Passenger Terminal is getting ready for an increased number of cruise ship turnarounds and home porting in Adelaide, commencing early 2016 with P&O's *Pacific Eden*.

Regional dispersal continues to be a high priority, and activity is ongoing with all stakeholders to further develop regional ports and experiences and to educate local communities about the benefits of supporting the growing cruise industry.

Kangaroo Island continues to grow year on year, and is providing extremely popular itineraries for both domestic and international passengers. From three cruise ship visits in 2012/13 to seven this season, next season there will be a record 10 visits, including a visit from the prestigious *Queen Victoria* early in 2016.

Port Lincoln, the Seafood Capital of Australia, hosted six cruise ship visits this year, and the newest regional cruise destination in South Australia, Robe, in the heart of the Limestone Coast, is expecting its first cruise ship visit by P&O's *Pacific Jewel* early in 2016.

The State Government and private partnerships in our 'Team South Australia' co-operative approach provide support to all stakeholders in the Australian cruise industry and continue to drive the success of cruise industry and develop opportunities for the state.



cruise shipping overview

TASMANIA

During the year, Lonely Planet featured Tasmania as part of its global 'Best in Travel' list, recommending the island at number four of the top ten regions to visit in 2015. This interest is reflected in the increased number of cruise ship visitors to Tasmania during another record season.

Tasmania welcomed 162,815 cruise ship visitors between October 2014 and May 2015, an increase of over 100% during the past five years. A total of 58 port calls were made during the season with 35 calls to Hobart, Burnie 12, Port Arthur 10 and one to Wineglass Bay on the east coast of Tasmania.

There has also been an increase in the range of cruise lines visiting. Several visited Tasmania for the first time in 2014-15 including La Compagnie du Ponant, who brought their 132-mega yacht *L'Austral* to Tasmania, with visits to Hobart and the east coast.

Carnival brought *Carnival Legend* to join *Carnival Spirit* cruising in Tasmania with several visits to Hobart and Port Arthur. *Oceania Insignia* had a maiden visit calling to Hobart in May.

Port calls will increase next season, with 61 cruise ship visits scheduled for 2015-16. Similar numbers are projected for the next two seasons.

The redevelopment by Tasports of the Macquarie Wharf No.2 facility as a dedicated cruise ship and Antarctic facility has been a great success, providing improved facilities for disembarkation, provision of visitor information, an art & craft market and money exchange. Volunteers provide a friendly meet and greet service and we now have improved logistics for coaches operating in the cruise lines' shore excursion programs.

The construction of improved jetty facilities at Port Arthur, supported by the Commonwealth's Tourism Industry Regional Development Fund and investment by the Port Arthur Historic Site Management Authority, saw growth in the number of ship visits to the site and continuing next season with 13 calls booked at Port Arthur.

Tasmanian tourism operators continued to innovate with new products suitable for shore excursions. In North West Tasmania new apps and touring routes provided 'behind the scenes' access to growers and makers of fresh Tasmanian produce – showcased on the Cradle to Coast Tasting Trail website. A short flight from Burnie and ideal day excursion is King Island, famous for its abundant green pastures and cheese-making heritage as well as spectacular coastline. New hallmark experiences include two Links golf courses opening in 2015/16, Ocean Dunes Links Golf Course and the Cape Wickham Golf Course.

State-wide collaboration saw the development of cider and whisky 'trail' websites, providing inspiration for new shore excursion tours. Passengers can visit the cellar doors, learn about the main producers and the art of cider and whisky making, and follow the map to plot cellar door visits. See www.tascidertrail.com and www.taswhiskytrail.com.

On the Tasman Peninsula new experiences included the Port Arthur Lavender Farm with café and interpretation of the lavender oil distilling process, Bangor Wine & Oyster Shed, McHenry Distillery whisky and gin making tutorials, Federation Chocolate and 'Unzoo' at the Tasmanian Devil Conservation Park.

Tourism Tasmania, Tasports, local councils and tourism operators continued to work co-operatively, ensuring a co-ordinated approach in working with the cruise lines. New resources developed for industry in 2014/15 included a guide for cruise lines providing information to assist with itinerary planning and covering all Tasmania's ports and anchorages, available at www.tasports.com.au. Additionally a guide for local tourism operators was produced to assist in understanding and working with the cruise ship sector, available at www.tourismtasmania.com.au.



VICTORIA

Victoria welcomed more than 160,000 cruise ship passengers in 2013-14. Melbourne continues to drive the cruise ship arrivals with a total of 76 cruise ship visits. Station Pier, Melbourne's dedicated cruise ship facility, hosted 53 transit visits and 23 turnaround visits. Melbourne continues to grow as a turnaround port with excellent access, facilities and availability of stores. The *Dawn Princess* was responsible for most of the turnarounds in 2014/15, whilst the growth of domestic cruising saw P&O Cruises use Melbourne as the base port for the *Pacific Jewel* on five occasions later in the season.

Regional Victoria also benefited from the growth in domestic cruising, with Portland receiving four ships and Mornington receiving two ships for the first time ever. Both destinations went to great lengths to ensure the visit by 2,000 passengers was a memorable experience. Markets were arranged and an extensive shore excursion program was put together to ensure that passengers were able to see and experience the breadth and depth of product each region had to offer. Further cruises are planned to both destinations in 2015/16. In order to facilitate the visits to Portland, the Victorian Government provided almost \$250,000 in funding towards upgrading the SL Paterson Berth, with work being completed before the first ship arrived on 25 February 2015.



This season Geelong received two ship visits, both international transit calls from the *Seabourn Odyssey* and the *Marina*. Tourism Greater Geelong and Bellarine welcomed guests disembarking at the Royal Geelong Yacht Club and offered new and exciting shore excursion tours to passengers on board both ships.

Tourism Victoria continues to work closely with key cruise lines to assess the viability of new regional ports and destinations for cruise ship visits and was delighted with the outcome of the inaugural season at Mornington and the four visits to Portland.

Key marketing activities have included sales calls to cruise lines in the UK, USA and those based in Australia, along with visits to key ground handlers working with the cruise lines to facilitate shore excursions.

The Port of Melbourne Corporation continues to effectively lead the Melbourne Cruise Ship Committee and drives collaboration between Tourism Victoria, the City of Melbourne, the City of Port Phillip, Public Transport Victoria and other key stakeholders, ensuring that Melbourne continues to benefit from the strong growth in this important sector.



cruise shipping overview



WESTERN AUSTRALIA

Cruise shipping to Western Australia continues to grow across the state's 10 cruise destinations – Perth/Fremantle, Esperance, Albany, Bunbury, Busselton, Augusta, Geraldton, Exmouth, Port Hedland and Broome.

Fremantle Ports has advised that in 2014-15 Fremantle experienced one of its biggest cruise ship seasons in 40 years, attracting more than 40 ships and over 110,000 passengers. Next financial year is shaping up to be even bigger, with more than 45 ships already booked to visit Fremantle.

In 2014-15, there were many exciting developments in WA's cruise shipping industry.

Cruise and Maritime Voyages' 620-passenger ship, the *Astor*, sailed into Fremantle for its second season in December 2014. The cruise liner has

chosen Fremantle as the home port for the *Astor* for three cruise seasons.

From April 2015, Princess Cruises also undertook its first ever year-round program of sailing from Fremantle. The cruise line estimated it will carry more than 45,000 passengers to and from Fremantle between April 2015 and March 2016.

In addition, Carnival Australia based its 1,900 passenger superliner the *Pacific Jewel* in Fremantle for the 2014-15 season, becoming the first cruise operator to sail to Busselton in the Margaret River region as part of its cruise program from Fremantle. The *Pacific Jewel* will also sail on two, eight-night cruises to the West Australian ports of Geraldton, Broome and Exmouth, and it will visit Esperance during a cruise from Adelaide to Fremantle.

Passengers on the *Crystal Serenity* celebrating its 25th anniversary world cruise, had the opportunity to visit the new National Anzac Centre in Albany. The centre offers a truly unique and moving experience, honouring the Anzacs of the First World War, and provides an interactive, engaging and moving reflection of the Anzac story. The centre has gained worldwide attention and is one of Lonely Planet's top 26 new travel experiences for 2015. Passengers arriving in Fremantle in March 2015 on the *MSC Orchestra*, *Pacific Jewel* and *Crystal Serenity* were provided with a special commemorative 2015 Anzac Day coin on a card that featured the National Anzac Centre.

In terms of infrastructure, the Augusta Small Boat Harbour opened late 2014, providing a new anchorage port in the Margaret River region with ample jetty facilities for cruise ship tenders.



The hydrographic mapping has been completed and surrounding deep water will allow ships to anchor relatively close (i.e. 400 metres from the entrance).

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

In September 2014, the agency hosted the Cruise Down Under Conference in Perth, which provided us with an opportunity to showcase WA's extraordinary tourism experiences and growing cruise shipping industry.

Tourism WA also contributed to the quality of the shoreside experience for cruise passengers by providing shade marquees to all WA port destinations in 2014-15. On a larger scale, we facilitated Federal Government funding support for the Busselton Jetty upgrade.

In addition, with funding from Cruise Down Under, Tourism WA successfully undertook research in 2015, interviewing more than 800 passengers in Fremantle and Busselton. The research will help us to gain a better understanding of what passengers want and require at port destinations as well as identify areas needing improvement for future cruise ship visits. The final report will be available in mid-2015.



PAPUA NEW GUINEA

PNG has experienced exceptional growth in the cruise ship market since 2013. Combined efforts by the PNG Government, PNG Tourism Promotion Authority and provincial stakeholders investing in cruise tourism are beginning to pay off. An emphasis on having the right infrastructure in place, training and awareness and product development is setting the foundations for cruise tourism in PNG.

The Port of Alotau, which is the premier cruise port in PNG, received most of the cruise ships arrivals, with Carnival Australia being the dominant player. The Milne Bay Islands also received cruise ships, both large and expeditionary. Further north in PNG, Rabaul, which is also a popular tourist hot spot, shared a similar number of calls as Alotau. Early this year, Carnival Australia introduced Madang and Wewak to its itinerary. Madang's



cruise shipping overview

maiden cruise was successful; however, Wewak did not eventuate due to bad weather. With lobbying by PNG Tourism, Carnival Australia has given the green light for a revisit to Wewak in its 2016 itinerary. Development scoping is also in progress for Ali Island, Manus, Buka and Pomio.

PNG has now developed a 'Cruise DVD' promoting the country's cruising destinations. It showcases PNG's vibrant cultures, rugged mountains, valleys and pristine white sandy beaches. The development

of destination maps and visitor information for our cruise passengers is also underway.

The ports of Alotau and Rabaul now have Volunteer Youth Ambassadors (VYAs). They give visitors the best information on the surrounding area. They provide extra security and tour guiding, and are available for ships to utilise whilst in port. The volunteer program was established by TPA and is carefully monitored and co-ordinated by local tourism offices.

Whilst PNG faces a number of challenges such as a lack of provincial government support to develop cruise tourism, a lack of appropriate public amenities and infrastructure, we are trying to build relationships with local bureaus and various stakeholders to ensure PNG continues to grow as a cruise destination. With cruise ship numbers increasing over the next five years, the challenge is to capitalise on this increasing number to ensure that local communities benefit from cruise tourism.





NEW CALEDONIA

New Caledonia welcomed more passengers during the 2014 cruise season. In 2014, 421,636 passengers have visited the island, which represents an increase of nearly 9.25% compared to 2013, and 207 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 2014 for the New Caledonia cruising industry was its participation at the Miami Seatrade event in March. With over 11,000 participants, the Miami Seatrade has, for 29 years, been the world leader in conferences and expositions for the cruising industry. For the 12th year in a row, New Caledonia participated alongside Australia (represented by the Cruise Down Under Association, of which New Caledonia is a member) and New Zealand. Since 2013, New Caledonia has also been a member of the South Pacific Cruise Alliance (SPCA).

Other important highlights of the 2014 season were the arrival of new cruise ships. A total of three new cruise ships docked in New Caledonia: *Carnival Legend*, *Celebrity Century* and *Queen Victoria*.

In the next twelve months, New Caledonia will receive a further increase of cruise ship visits with future bookings scheduled for the 2015 season reaching 444 and 530 for 2016.





Back: John McKenna (Port Authority of NSW), Thor Elliott (Fremantle Ports), Tyler Wood (Bob Wood Cruise Group), Stephen Bradford (Chairman), Richard Schoonraad (Tourism NT)
 Front: Anne McVilly (Port Arthur Historic Site), Leah Clarke (South Australian Tourism Commission), Jill Abel (CEO), Julie O'Brien (Tourism and Events Queensland)

Stephen Bradford

Independent Chairman

Term Expires 2016

Stephen Bradford was appointed as CDU's first Independent Chairman in September 2014. Stephen retired as CEO of the Port of Melbourne Corporation (a member of CDU) in December 2013.

Stephen now advises on ports and logistics. Stephen has broad experience having previously been Chairman of the Australasian Rail Association, Deputy Chairman of the Tourism & Transport Forum (TTF) and a Director of international marine and ports underwriter Through Transport Mutual in the UK.

Richard Schoonraad

**Joint Deputy Chairman
 Tourism NT**

Term Expires 2015

Richard is the Manager Market Development for Tourism NT, based in Darwin and responsible for maximising the impact of the cruise sector for the region. Richard works closely with the Darwin Port Corporation, Darwin Waterfront 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.

With over 20 years' experience in the tourism industry, Richard has held previous roles in national tourist offices, inbound management, private enterprise and sales and marketing.

Tyler Wood

**Joint Deputy Chairman
 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.



Thor Elliott

**Treasurer
Fremantle Ports**

Term Expires 2015

Thor is the Trade Development Manager at Fremantle Ports. Thor has been at the Port for 29 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 Port's operational processes to cater for the ever-expanding cruise industry. He has also been heavily involved with WA Tourism in developing Western Australia's first strategic plan for cruise shipping. Thor represents Cruise Down Under and Fremantle Ports on the Cruise WA Committee.

Leah Clarke

**Member
South Australian Tourism
Commission**

Term Expires 2015

Leah Clarke is the Manager of the Product, Cruise and Distribution Development team within the Destination Development/ International Marketing division of the South Australian Tourism Commission. Key areas of focus include development with key trade distribution partners creating new saleable experiences in the cruise industry and backpacker/ youth sectors.

Leah has worked for the South Australian Tourism Commission for the past 15 years, with experience in the areas of business advice, product development, national tourism and business accreditation, business and operator training, and she has worked as an advisor for the Minister for Tourism.

Anne McVilly

**Member
Port Arthur Historic Site**

Term expires 2016

Anne is the Director of Tourism Operations for Port Arthur Historic Sites which encompasses Port Arthur, the Coal Mines and Cascades Female Factory in Hobart.

Anne is responsible for everything tourism including visitor services, food & beverage, retail, guiding, new product development and visitor satisfaction.

Anne has an extensive knowledge of the cruise sector and in recent years has assisted in the development of new products and experiences to fit with the shore excursion programs; managed the meet and greet program for Hobart; produced cruise guides for passengers and stakeholders; conducted tourism industry workshops and presentations to local councils & retail industries on benefits of the cruise sector; developed interpretation training for Tasmanian-based cruise tour guides and volunteers; and worked with state and regional tourism bodies and inbound operators in destination development.

John McKenna

**Member
Port Authority of New South Wales**

Term expires 2016

John is the General Manager of Cruise at the Port Authority of New South Wales. John is responsible for the cruise division which includes the operations at the White Bay and Overseas Passenger terminals. 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.

Julie O'Brien

**Member
Tourism and Events Queensland**

Term expires 2016

Julie has over 25 years' experience in the tourism industry in both the public and private sector. She is passionate about delivering the best quality Queensland experience to the consumer and has worked in the development of the cruise sector in Queensland for the past few years. Julie's strong relationship with key stakeholders within the cruise industry provides Tourism and Events Queensland (TEQ) with an in-depth understanding of the market's current



management committee – 2014 | 15

needs and future potential. Julie has considerable experience as a leader in destination and experience development activities across a number of market sectors, including Indigenous experience development and ecotourism. She works closely with Queensland's 11 ports of call to ensure the success of shore excursion product development, and the establishment of new destinations to suit the cruise market. Julie is currently the Tourism and Events Queensland Destination Manager for Townsville, as well as undertaking her cruise related responsibilities.

Jill Abel
Chief Executive Officer
July 2013 to June 2016

The Management Committee held the following meetings:

114		8 Aug 2014	Melbourne
115	AGM	5 September 2014	Perth
116		30 September 2014	By Teleconference
117		27 November 2014	Sydney
Strategic Planning session		16 February 2015	Sydney
118		7 May 2015	Brisbane

Attendance at Management Committee Meetings

Record of attendance at scheduled Management Committee meetings:

Member	Meetings Attended	Meetings Eligible to Attend
Stephen Bradford	5	5
Richard Schoonraad	6	6
Tyler Wood	4	6
Thor Elliott	6	6
Leah Clarke	5	6
Julie O'Brien	4	5
Anne McVilly	5	5
John McKenna	6	6
Chris White	2	2
David Brown	2	2
Tim Short	2	2
Jill Abel	6	6



Committees and Sub-Committees

Listed below is the allocation of responsibilities for the committees and sub-committees for the 2014-15 year.

Committees

Management Committee

Responsible for:

- Rules of Association
- Financial Delegation
- CEO's contract
- Strategic Planning
- Succession Planning
- Legal and Property matters

The Executive – Chairman, Joint Dep. Chairmen and Treasurer

Rule 40

Chief Executive Officer – Jill Abel

- Secretary of the Association
- Cruise Shipping Miami Convention
- Global Sales Missions
- Government liaison
- Economic Impact Study
- Conference and AGM
- Management Committee meetings
- Website management
- Travel Programs/Familiarisations
- Education
- Membership development
- Media spokesperson

Sub-Committees

Rule 39

Sub-Committee 1 – Chairman Stephen Bradford and Joint Deputy Chairman Richard Schoonraad

- Leadership
- Governance
- Political liaison
- Media spokesperson
- Succession Planning

Sub-Committee 2 – Joint Deputy Chairman Richard Schoonraad, Anne McVilly

- Annual Operating Plan
- Risk Management Plan
- Rules of Association
- 3 year Strategic Plan

Sub-Committee 3 – Treasurer Thor Elliott and Chairman Stephen Bradford

- Financial Management and Reporting
- Budget
- Insurance

Sub-Committee 4 – Joint Deputy Chairman Tyler Wood, Julie O'Brien

- Membership and education
- Industry forums

Sub-Committee 5 – Leah Clarke, John McKenna, Julie O'Brien

- Communications strategy
- Implementation of public relations plan

Sub-Committee 6 – Deputy Chairman Richard Schoonraad, Anne McVilly

- Annual Conference and AGM

Sub-Committee 7 – Chairman Stephen Bradford, Anne McVilly and Leah Clarke

- Annual Report

2014–2015 Annual Operating Plan

Vision	Focus 1	Focus 2
Develop and grow the Australia, Asia and South Pacific region (CDU) as a major world class base and destination for cruise ships.	Leadership and Governance	Research and Insights
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.	Objectives Establish strategies to continue the recognition of CDU as the respected peak organisation connecting and representing the broader cruise industry	Provide CDU members with useful, accurate and meaningful research into the cruise sector
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:	Priority Projects 2014-15 <ul style="list-style-type: none"> • Prepare annual operating plan, annual report, financial report, budget • Review governance reports e.g. business continuity plan, code of conduct • Prepare and submit EMDG application • Develop strategies to ensure a sustainable future • Execute strategy to recruit external Chair • Ensure sustainable resourcing to deliver Strategic Plan • Streamline financial reporting • Review communications strategy • Undertake review of association name and brand • Profile the role and success of CDU to industry, government and community 	<ul style="list-style-type: none"> • Annual CDU cruise conference (incl. industry sessions) • Respond to Government inquiries • International Cruise Conferences (Miami and Asia) • Cruise Data Research Fund • Facilitate key industry forums and education workshops • Assist with development of new tourism product • Implement stakeholder and member feedback
	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 	<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 • Host 2014 cruise conference
	Key Achievements 2014-15 <ul style="list-style-type: none"> • 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 engaging with federal politicians via the EMDG for work completed in 2013-14 • Successful appointment of external Chair • Productive, ongoing dialogue with CLIA to maintain united voice for industry • Appointment of administration assistant • Moved financial accounting to cloud based Xero with reporting support for CEO • Reviewed association name and branding 	<ul style="list-style-type: none"> • Released the Economic Impact Study 2013-14 celebrating 10 years of independent cruise data reporting • Distributed AEC's report to membership, stakeholders and government with summary report available to non-members • Supported 3 STOs with research projects through grant funding • Delivered successful CDU Conference in Perth, Sept 2014 with three leading international cruise execs as keynote speakers • Conducted three industry forums in Sydney, Melbourne and Brisbane • New cruise-ready shore ex product presented to cruise lines • Conducted membership and stakeholder survey • Developed a strategy to recruit PR agency to support CEO

Focus 3 Position and Market the CDU region as a world class destination	Focus 4 Membership	Focus 5 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 2015 in collaboration with Cruise Shipping Miami Convention Participate at Cruise Shipping Miami Convention Have presence at Cruise Shipping Asia Implementation actions of communications strategy Marketing plan for 2014/15 Leverage key stakeholders cruise sector comments Work to include a cruise ship component within relevant associations' agenda Develop and plan Familiarisation Program targeted around conference Support Tourism Australia at select trade events (Cruise 3Sixty, etc.) 	<ul style="list-style-type: none"> Review Membership and Education strategy Attract new members Review membership structure and fees Update membership collateral/brochure Host industry forums 	<ul style="list-style-type: none"> Develop and update 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 Maintain strong alliances with State/Territory/Regional Tourism organisations Continue to manage the broader regional alliance (SW Pacific) Leverage relationships with neighbouring regions (e.g. Asia) to maximise opportunities for the CDU region
<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 	<ul style="list-style-type: none"> Review communication platforms for members Rotate management meetings in different locations (Educational component) 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 Develop famils for cruise line executives 	<ul style="list-style-type: none"> Increase membership numbers Circulate regular Member Updates Complete membership video 	<ul style="list-style-type: none"> Attend Federal Govt. working committee meetings Meet with federal ministers annually Circulate CDU News twice annually
<ul style="list-style-type: none"> Delivered key strategies of marketing plan Conducted extensive famil program for cruise line executives attending 2014 CDU conference Provided effective communications and feedback to members, cruise lines and industry stakeholders Updated Communications Strategy Updated and continued to improve CDU website Managed Australia/ NZ/South Pacific regional presence at Cruise Shipping Miami with larger stand and delegate event Met with all major cruise lines at Cruise Shipping Miami conference Held the combined Down Under BBQ at Cruise Shipping Miami Attended a range of industry events in Miami Conducted trade mission with major cruise lines in Miami, Seattle, Los Angeles and London Trained 180 Reservation staff on shore excursion opportunities as well as pre and post cruise touring options Worked with STO's to produce a comprehensive powerpoint presentation on Australia as a cruise destination Supported Tourism Australia at Cruise3Sixty event in USA Refreshed and distributed CDU Newsletter, communicating cruise product and infrastructure developments to stakeholders Cruise Shipping Asia was postponed 	<ul style="list-style-type: none"> Welcomed 4 new members Increased awareness of membership benefits Produced and uploaded member benefits video to website Continued to update membership and education strategy Reviewed membership fees Presented to member and stakeholder organisations and potential new members 	<ul style="list-style-type: none"> Increased stakeholder co-operation Increased understanding/awareness of stakeholders' objectives and operations Represented CDU members on the National Sea Passenger Facilitation Committee Presented at a range of tourism and port sector forums Provided input and formal submissions into the Morrison Review (border fees, charges and taxes) Followed up on the review of the Coastal Trading Act



Cruise Down Under Conference

The 2014 Cruise Down Under Conference was held in Perth in September and was sponsored by Tourism WA, Fremantle Ports and City of Fremantle. The conference, themed “Beyond gateway ports – Navigating new destinations”, attracted 124 delegates from Australia, New Zealand, Papua New Guinea, Indonesia, United Kingdom and USA.

Keynote presentations:

- Colleen Crisp, Contracts Manager – Air & Land Services, Fred. Olsen Cruise Lines
- Crystal Morgan, Director Deployment Planning, Princess Cruises
- Steven Young, Head of Port Operations, Carnival UK

Other speakers included:

- Simon Smith, AEC Group
- Tammy Marshall, Carnival Australia
- Sean Treacy, RCL
- Capt. Allan Gray, Fremantle Ports

Cruise Shipping Miami

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

In 2015 it was attended by the following members:

- Stephen Bradford – Chairman, CDU
- Jill Abel – CEO, CDU
- Chris White – Tourism Victoria
- Richard Schoonraad – Tourism NT
- Leah Clarke – South Australia Tourism Commission
- Irene Morgan – Destination NSW
- Leigh Arrendondo – Tourism and Events Queensland

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

- Peter Vincent and Alcinda Trawen – Papua New Guinea Tourism
- 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
- Celebrity Cruises
- Silversea Cruises
- Saga Cruise Line
- Regent Seven Seas Cruises
- Oceania Cruises
- Seabourn Cruise Line
- Fred. Olsen
- Ponant
- Zegrahms
- Lindblad Expeditions
- Crystal Cruises
- Viking Cruises
- Noble Caledonia
- Residensea

Marketing Communications

A review of the Communications Plan was undertaken with the aim to heighten and broaden the communication messages of Cruise Down Under. From the review an external consultancy brief was developed to assist with strengthening the awareness and promoting members and their services on a global platform.



Economic Impact Study

The CDU 2013-14 Economic Impact Study, undertaken by AEC Group, celebrated ten continuous years of reporting. The study cemented its place as the most relevant and independent report with longevity in the market place. It 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 \$3.16 billion in 2013-14, including direct expenditure of \$1.85 billion. This was a 15.8% increase from 2012-13 when total direct expenditure was estimated at \$1.6 billion. If looking solely at the international market, the total expenditure was \$2.16 billion.

The following table highlights growth trends for the period 2012-13 to 2013-14:

Table E.1: Comparison of Australian Cruise Ship Industry Demand Indicators

	2012-13	2013-14	Actual Change	% Change
Number of Australian ports visited by cruise ships	30	32	2	6.7%
Cruise Ship Characteristics				
Number of visiting cruise ships	43	45	2	4.7%
Passenger capacity of the cruise ships	62,051	63,263	1,212	2.0%
Number of crew on the cruise ships	27,032	28,061	1,029	3.8%
Cruise Ship Visits				
Number of cruise ship visits to ports	692	773	81	11.7%
Number of base visits	317	347	30	9.5%
Number of transit visits	375	426	51	13.6%
Passengers and Crew				
Total passenger days at port	1,814,581	1,956,194	141,613	7.8%
Total crew days at port	374,160	434,058	59,898	16.0%
Expenditure				
Passengers (\$m) ^(a)	\$572.7	\$675.6	\$102.9	18.0%
Crew (\$m) ^(a)	\$69.8	\$71.0	\$1.2	1.7%
Port-related by operators (\$m)	\$826.0	\$940.6	\$114.6	13.9%
Corporate (\$m)	\$160.3	\$166.8	\$6.4	4.0%
TOTAL	\$1,628.9	\$1,854.0	\$225.2	13.8%

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

Table E.2: Summary of Direct Expenditure associated with the Cruise Shipping Industry in Australia, 2013–14

State/Port	Visits	Passenger Days At Port	Crew Days At Port	Direct Expenditure (\$m)				Total
				Passenger(a)	Crew(a)	Operator	Corporate	
NSW:								
Eden	2	936	317	\$0.201	\$0.021	\$0.033	\$0.000	\$0.256
Newcastle	9	19,992	3,964	\$3.791	\$0.265	\$4.668	\$1.914	\$10.638
Sydney (b)	256	1,017,188	222,202	\$435.591	\$43.795	\$504.970	\$134.368	\$1,118.724
<i>Total</i>	<i>267</i>	<i>1,038,115</i>	<i>226,483</i>	<i>\$439.583</i>	<i>\$44.082</i>	<i>\$509.671</i>	<i>\$136.283</i>	<i>\$1,129.618</i>
VIC:								
Geelong	5	1,575	717	\$0.087	\$0.026	\$0.171	\$0.000	\$0.284
Melbourne	67	144,643	34,457	\$33.083	\$2.671	\$130.242	\$3.320	\$169.315
Portland	1	293	146	\$0.016	\$0.005	\$0.034	\$0.000	\$0.055
<i>Total</i>	<i>73</i>	<i>146,511</i>	<i>35,320</i>	<i>\$33.186</i>	<i>\$2.702</i>	<i>\$130.447</i>	<i>\$3.320</i>	<i>\$169.654</i>
QLD:								
Brisbane	115	350,752	68,309	\$128.491	\$14.099	\$200.969	\$20.357	\$363.917
Cairns	45	47,785	12,469	\$10.195	\$0.851	\$1.510	\$0.037	\$12.592
Cooktown	4	1,330	643	\$0.330	\$0.043	\$0.015	\$0.000	\$0.388
Moreton Is	3	5,245	880	\$0.995	\$0.059	\$0.388	\$0.000	\$1.441
Port Douglas	23	30,505	8,512	\$5.937	\$0.567	\$0.135	\$0.000	\$6.639
Thursday Is	6	1,319	429	\$0.327	\$0.029	\$0.017	\$0.000	\$0.374
Townsville	9	6,770	1,888	\$1.496	\$0.127	\$0.674	\$0.000	\$2.296
Whitsundays	33	61,424	13,068	\$12.524	\$0.874	\$1.038	\$0.000	\$14.436
<i>Total</i>	<i>238</i>	<i>505,130</i>	<i>106,198</i>	<i>\$160.294</i>	<i>\$16.648</i>	<i>\$204.747</i>	<i>\$20.394</i>	<i>\$402.083</i>
SA:								
Adelaide	17	28,213	6,747	\$6.685	\$1.104	\$1.316	\$0.409	\$9.513
Kangaroo Is	7	5,108	1,295	\$1.065	\$0.087	\$0.085	\$0.000	\$1.237
Port Lincoln	2	2,916	558	\$0.553	\$0.037	\$0.031	\$0.000	\$0.621
<i>Total</i>	<i>26</i>	<i>36,238</i>	<i>8,600</i>	<i>\$8.303</i>	<i>\$1.227</i>	<i>\$1.432</i>	<i>\$0.409</i>	<i>\$11.371</i>
WA:								
Albany	5	5,103	1,376	\$0.282	\$0.091	\$0.282	\$0.000	\$0.655
Broome	14	9,455	2,598	\$1.135	\$0.199	\$0.585	\$0.000	\$1.919
Bunbury	3	1,476	457	\$0.081	\$0.031	\$0.118	\$0.000	\$0.230
Esperance	6	9,427	2,209	\$0.520	\$0.148	\$0.394	\$0.000	\$1.062
Exmouth	2	945	307	\$0.032	\$0.021	\$0.072	\$0.000	\$0.125
Fremantle	31	53,054	12,813	\$11.596	\$2.175	\$43.133	\$6.189	\$63.093
Geraldton	3	3,197	737	\$0.107	\$0.050	\$0.397	\$0.000	\$0.554
Port Hedland	4	9,893	2,199	\$0.848	\$0.147	\$0.425	\$0.000	\$1.420
<i>Total</i>	<i>68</i>	<i>92,549</i>	<i>22,696</i>	<i>\$14.601</i>	<i>\$2.861</i>	<i>\$45.407</i>	<i>\$6.189</i>	<i>\$69.059</i>
TAS:								
Burnie	12	15,274	3,648	\$1.770	\$0.416	\$0.627	\$0.000	\$2.813
Coles Bay	3	3,478	757	\$0.398	\$0.086	\$0.145	\$0.000	\$0.629
Devonport	1	103	37	\$0.013	\$0.004	\$0.000	\$0.000	\$0.017
Hobart	36	63,519	16,193	\$7.310	\$1.845	\$2.652	\$0.000	\$11.807
Launceston	0	0	0	\$0.000	\$0.000	\$0.000	\$0.000	\$0.000
Port Arthur	8	11,479	2,697	\$1.327	\$0.307	\$0.487	\$0.000	\$2.122
Wineglass Bay	3	4,198	1,119	\$0.480	\$0.128	\$0.220	\$0.000	\$0.828
<i>Total</i>	<i>63</i>	<i>98,050</i>	<i>24,451</i>	<i>\$11.297</i>	<i>\$2.787</i>	<i>\$4.131</i>	<i>\$0.000</i>	<i>\$18.215</i>
NT:								
Darwin	38	39,601	10,310	\$8.378	\$0.707	\$44.808	\$0.160	\$54.053
<i>Total</i>	<i>38</i>	<i>39,601</i>	<i>10,310</i>	<i>\$8.378</i>	<i>\$0.707</i>	<i>\$44.808</i>	<i>\$0.160</i>	<i>\$54.053</i>
OVERSEAS TERRITORIES:								
Christmas Island	0	0	0	\$0.000	\$0.000	\$0.000	\$0.000	\$0.000
Norfolk Island	0	0	0	\$0.000	\$0.000	\$0.000	\$0.000	\$0.000
<i>Total</i>	<i>0</i>	<i>0</i>	<i>0</i>	<i>\$0.000</i>	<i>\$0.000</i>	<i>\$0.000</i>	<i>\$0.000</i>	<i>\$0.000</i>
Australia	773	1,956,194	434,058	\$675.629	\$71.014	\$940.643	\$166.754	\$1,854.041

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



Table E.3: National Economic Impacts of Cruise Shipping in Australia

Impact	Excluding Domestic Passengers (a)			All Passengers (b)		
	2012-13	2013-14	Change (%)	2012-13	2013-14	Change (%)
Output (\$m)						
Direct	\$1,133.0	\$1,281.9	13.1%	\$1,628.8	\$1,854.0	13.8%
Indirect	\$775.0	\$878.7	13.4%	\$1,102.7	\$1,310.4	18.8%
Total	\$1,907.9	\$2,160.7	13.2%	\$2,731.5	\$3,164.5	15.8%
Wages Income (\$m)						
Direct	\$390.3	\$436.8	11.9%	\$533.2	\$588.5	10.4%
Indirect	\$189.6	\$214.6	13.2%	\$264.6	\$312.6	18.1%
Total	\$579.9	\$651.4	12.3%	\$797.8	\$901.2	13.0%
Employment (FTEs)						
Direct	4,348	4,994	14.8%	6,857	8,352	21.8%
Indirect	2,677	3,007	12.3%	3,959	4,567	15.4%
Total	7,025	8,001	13.9%	10,815	12,918	19.4%
Value Added (\$m)						
Direct	\$589.6	\$660.8	12.1%	\$819.2	\$913.9	11.6%
Indirect	\$355.9	\$403.5	13.4%	\$494.7	\$586.8	18.6%
Total	\$945.5	\$1,064.3	12.6%	\$1,313.9	\$1,500.7	14.2%

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.



record of past annual general meetings and conferences

Year	Destination	No. of Attendees	Date
2014	Perth	124	3-5 September
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



members' register

CDU registered 77 members as at 30 June 2015:

Name	Person	Level	Member Since
AAT Kings	Katie Laird	Bronze	2005
Abercrombie & Kent	Toby Biddick	Silver	2002
Accor	Matt Borger	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
Austrade	Christian Hanley	Honorary	1993
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	Jenny Cox	Gold	1998
Captain Cook Cruises (WA)	Pauline McAlinden	Bronze	2011
Carnival Australia/Holland America Line	Paul Mifsud	Platinum	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 McGuren	Bronze	2014
Corporate Protection Australia Group	Rory O'Shea	Bronze	2014
Cruise Eden	Natalie Godward	Silver	2001
Cruise Hunter	David Brown	Gold	2001
Darwin Port Corporation	Peter Dummett	Platinum	1995
Destination NSW	Catherine Dunkerley	Platinum	1995
Devonport City Council	Stuart Jones	Bronze	2012
DTESB - Queensland	Mark Jones	Bronze	2003
Flinders Ports	Carl Kavina	Platinum	2009
Fremantle Ports	Thor Elliott	Platinum	1995
Glenelg Shire Council	Neil Burgess	Bronze	2010
Glenn Stephens	Glenn Stephens	Honorary	2014
Great Southern Rail	Damien Wolff	Silver	2011
Hobart City Council	Alex Heroys	Bronze	2009
ID New Zealand	Deborah Summers	Silver	2014
Intercruises Shoreside and Port Services	Martin Bidgood	Silver	2011
Kimberley Ports Authority	Capt. Vic Justice	Gold	1999



Name	Person	Level	Member Since
Kuranda Scenic Railway	Ivana Andacic-Tong	Bronze	2008
Mantra Group	Richard Cockshott	Bronze	2013
Mike Bartlett	Mike Bartlett	Honorary	2007
Mid West Ports	Brad Muir	Gold	2007
Ministry of Tourism & Creative Economy, The Republic of Indonesia	Rizki Handayani	Platinum	2009
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	Anne McVilly	Gold	2007
Port Authority of NSW	John McKenna	Platinum	1993
Port of Melbourne Corporation	Evda Marangos	Platinum	2005
Port of Portland	Malcolm Geier	Silver	2007
Port of Townsville Ltd.	Donna Jefferies	Gold	2002
Ports Australia	David Anderson	Honorary	2005
Ports North	Kerry Egerton	Platinum	1993
Reef Magic Cruises	Jeff Cameron-Smith	Bronze	2013
Rotor-Lift Aviation	Susan Stanley	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	Adam Letson	Bronze	2011
South Australian Tourism Commission	Leah Clarke	Platinum	1998
Sunlover Reef Cruises	Alex Blake	Bronze	2013
Tasports - Burnie/Devonport/Launceston	Iain Chalmers	Gold	1993
Tasports - Hobart	Iain Chalmers	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	Barry Weare	Bronze	2014
Tourism and Events Queensland	Julie O'Brien	Platinum	1994
Tourism Australia	Leigh Sorensen	Platinum	1993
Tourism NT	Richard Schoonraad	Platinum	1998
Tourism Tasmania	Rita Warrenner	Platinum	1998
Tourism Tropical North Queensland	Brian Hennessy	Gold	2008
Tourism Victoria	Chris White	Platinum	1998



members' register

Name	Person	Level	Member Since
Tourism Western Australia	Christine Cole	Platinum	1998
Townsville Enterprise	Patricia O'Callaghan	Silver	1998
Victoria Star Cruises	Tim Ryan	Bronze	2008
Whitsundays Marketing & Development	Tash Wheeler	Gold	2013
Yorkeys Knob Boating Club Inc	Stuart Vella	Bronze	2015

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 2014-15:

- Yorkeys Knob Boating Club
- Corporate Protection Australia Group
- ID New Zealand
- Tourism Australia

The Management Committee accepted four resignations during 2014-15.

- Australian Shoreside Management
- Sofitel Sydney Wentworth – amalgamated with Accor membership
- Fergusson Winery
- Southern Cross Shipping



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 2014-15.

- Bob Wood Cruise Group
- Fremantle Ports
- Port Arthur Historic Site
- South Australia Tourism Commission
- Port Authority of NSW
- Tourism NT
- Tourism and Events Queensland



Government of South Australia





annual financial report for the year ended 30 June 2015

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Income Statement

For the year ended 30 June 2015

	Notes	2015 \$	2014 \$
Income			
Conference Sponsorship		38,000	18,500
Grants Received		73,388	73,026
Interest Received		20,402	22,155
Total Income		131,790	113,681
Other Income			
Conference		88,950	81,372
Membership Fees		243,388	197,547
Other Income		34,379	0
Total Other Income		366,717	278,919
Total Income		498,507	392,600
Expenses			
Audit Accounting Assistance		3,100	1,800
Administration		65,196	56,002
Annual Reports		6,590	6,074
Bank Charges		919	1,349
Committee Travel		9,683	8,059
Conference Expenses		108,136	88,041
EMDG and EIS Consultancy		23,338	15,199
Events and Venue Hire		14,875	5,955
Insurance		4,127	3,878
Legal Expenses		681	0
Marketing		174,971	165,280
Other Expenses		6,315	6,987
Printing and Stationery		5,484	5,827
Research Grants		45,000	0
Sub-Contractors		20,000	25,000
Subscription		54	688
Telephone		3,467	3,674
Travelling Expenses		20,546	27,868
Total Expenses		512,482	421,681
(Deficit/Surplus) from ordinary activities		(13,975)	(29,081)

Statement of Financial Position

For the year ended 30 June 2015

	Notes	2015 \$	2014 \$
Assets			
Current Assets			
Cash and Cash Equivalents	2	767,816	718,965
Trade and Other Receivables	3	167,645	19,004
Total Current Assets		935,461	737,969
Total Assets		935,461	737,969
Liabilities			
Current Liabilities			
Trade and Other Payables	4	386,334	189,625
GST Payable	5	14,762	0
Total Current Liabilities		401,096	189,625
Total Liabilities		401,096	189,625
Net Assets		534,365	548,344
Equity			
Retained Surpluses		534,365	548,344
Total Equity		534,365	548,344

Notes to the Financial Statements

For the year ended 30 June 2015

1. Statement 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 on 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 amounts less any provision for doubtful debts. A provision for doubtful debts is recognised when collection of the full amount is no longer possible. 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) GST

Revenues, expenses and assets are recognised net of the amount of GST, except where the amount of GST incurred is not recoverable from the Australian Taxation Office.

(f) 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 2015

	Notes	2015 \$	2014 \$
2 Cash & Cash Equivalents			
Cash at bank and on hand		269,605	239,461
Bank short term assets - Deposits		498,211	479,504
Total Cash & Cash Equivalents		767,816	718,965
3 Trade and Other Receivables			
Trade Receivables		115,315	0
Prepayments		52,330	18,025
Total Trade and Other Receivables		167,645	18,025
4 Trade and Other Payables			
Memberships in Advance		205,195	114,476
Trade Payables		11,000	0
Other Payables		136,472	0
Other amounts received in Advance		33,667	75,149
Total Trade and Other Payables		386,334	189,625
5 Current Tax Liabilities			
GST		14,762	(979)
Total Current Tax Liabilities		14,762	(979)

Statement by Members of the Management Committee

The Management 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 prescribed in Note 1 to the financial statements.

In the opinion of the committee the financial report:

1. Presents a true and fair view of the financial position of Cruise Down Under as at the end of June 2015 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 Management Committee and is signed for and on behalf of the committee by:



Chairman



Treasurer

Dated this 13th day of August 2015

KEVIN GUMLEY
Chartered Accountant

173 Macquarie Street Hobart Tasmania 7000
Telephone: (03) 6223 7850 Fax: (03) 6223 8827
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 2015, 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 describe 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 risk 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 2015 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
Charter Accountant
36 Norfolk Crescent
Sandy Bay Tas
Dated 14th day of August 2015



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.

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