

A large photograph of a camel ride on a beach at sunset. A line of camels with riders is walking along the water's edge, their reflections visible in the calm water. The sky is a mix of orange, yellow, and blue.

2017 2018

ANNUAL REPORT



australiancruiseassociation.com





Message from the Chair

Dear Member,

I enthusiastically took on the role of Chairman in September and with nine months under my belt I am pleased to present the Annual Report for the Australian Cruise Association for the period 1 July 2017 to 30 June 2018. This Report is prepared by the Management Committee in line with accepted business practices and governance principles adopted by the Committee.

A topic, certainly closer to me than many, is the infrastructure demands in Sydney that need to be resolved to ensure the future growth of the cruise industry, impacting the entire region. ACA has been integral in the current process and held a seat on the NSW Government's Cruise Industry Reference Group that delivered recommendations to Government at the end of 2017. That position has now progressed to being part of the industry engagement on the Cruise Development Plan.

The next few years are set to see real opportunities for growth as the planned infrastructure projects around the country reach completion. Brisbane and Cairns projects will create viable and exciting itineraries to build on the current South Pacific offerings. Eden and Newcastle will offer expansion of short cruise itineraries and links on the east coast, whilst Broome will hopefully create a driver for more investment on the west coast.

With 106 newbuilds on the order books through to 2027, of which by 2020 more than 50 percent of all ships in service will carry 3,000 plus passengers and a prediction that there will be close to 40 million people holidaying on a cruise, the future of cruise is very positive.

After many years of failed attempts but good intention, ACA and CLIA have released a joint economic impact study for the 2016/17 financial year, providing a united voice to all stakeholders of the economic value of cruise to both our capital gateways and our regional cities and towns. The joint reporting will continue with further developments being made to capture additional data and ensure accurate distribution of local benefits.

ACA has strengthened its relations with Ports Australia and there are some exciting opportunities being developed to distribute key messages on emerging issues such as environmental control.

At Seatrade Cruise Global in Florida this year, I was invited to present on a conference panel alongside Debbie Summers (Cruise New Zealand), Bruce Krumrine (Princess Cruises), Sture Myrmell (Carnival Australia), Harry Sommer (NCL) and moderated by Sarina Bratton (Ponant). The panel topic was "The Future of Cruising in Asia & Australasia" and had a clear focus on infrastructure requirements necessary to keep up with industry growth.

Our 21st Anniversary Conference, held in Mooloolaba last September, showcased the importance of regional Australia in dispersing the economic value of cruise outside the major gateways. Our guest speaker line-up was outstanding and the importance of having Steve Odell from Norwegian Cruise Lines and Chairman of CLIA was not lost, following the signing of our MOU with CLIA earlier in the year. A long standing member and previous Chair of ACA – Chris White was awarded life membership for her hard work and dedication towards our association.

Barking Owl was appointed for another year, continuing the strong communication messages for our association, both nationally and internationally, and developing new opportunities for our members to promote their products and businesses.

Other significant achievements during 2017-18 were:

- welcoming 13 new members
- delivered a hugely successful 21st ACA conference in Mooloolaba with robust discussion and valuable keynote speakers



- exhibited at Seatrade Cruise Global in Fort Lauderdale in March 2018 with Chairman participating in a conference session
- jointly delivered the inaugural report with CLIA on the economic benefits of the cruise industry in Australia as well as a supplementary regional report
- Strengthened working relations with CLIA
- delivered a research paper on the consumer trends of Australian travelers and the projected growth in cruise travel
- continued engagement with Tourism Australia to successfully market the destination globally and support with valuable research insights into the growing inbound cruise market
- engaged with key Federal and State politicians and government agencies, highlighting the industry potential and discussing key policy agendas.

I wish to acknowledge the work of my predecessor, Stephen Bradford, who strategically directed the organisation through a significant period in the associations history. Stephen stepped down as Chairman in September and certainly left a strong and united group for me to continue to work with. Thank you to John McKenna who has represented PANSW for a number of years on the committee. John continues to be involved in the Ports Sub Committee and National Sea Passenger Facilitation Committee

Thank you to our wonderful members of the Management Committee for their ongoing hard work and knowledgeable direction and to the member organisations that support them in the role. Farewell to Richard Schoonraad, past Deputy Chairman, who has taken on a new role outside of the tourism industry. To Tyler Wood, a long serving committee member and past Deputy Chairman, thank you for six solid years of contribution to the ACA.

My sincere thanks to our CEO, Jill Abel, for her boundless enthusiasm and ongoing commitment to the association, its members and the cruise industry as a whole.

Finally, I thank all of the ACA membership for your ongoing support and drive for the Australian cruise sector and look forward to seeing you in Broome in September at our 22nd ACA Conference.

Yours sincerely

Mr Grant Gilfillan
Chairman
30 June 2018

A large whale shark is swimming towards the left in the foreground, its body covered in white spots and stripes. In the background, several divers are visible, swimming in the same direction. The water is a deep blue, and the scene is captured from an underwater perspective.

The Australian Cruise Association (ACA) is a peak body representing the cruise shipping industry in Australia to realise the region's potential as one of the world's leading cruise destinations providing opportunities for ongoing sustainability.



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Develop and grow Australia's position as
a major world class base and appealing
destination for cruise ships.



Charter

Australian Cruise Association (ACA) is the co-operative marketing brand for cruise destinations and service providers to the cruise industry in Australia and the South Pacific.

The Australian Cruise Association is a non-profit incorporated association formed in 1998.

The Australian Cruise Association 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 Australia's position as a major world class base and appealing destination for cruise ships.

Mission

The Australian Cruise Association (ACA) is a peak body representing the cruise shipping industry in Australia to realise the region's potential as one of the world's leading cruise destinations providing opportunities for ongoing sustainability.

Objective

To influence cruise and charter operators to develop itineraries to increase cruise visits in Australia. To achieve this, ACA has set itself the following five (5) key objectives:

Leadership and Governance

Establish strategies to continue the recognition of ACA as the respected industry organisation connecting and representing the cruise industry.

Research and Insight

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

Position and Market the Australian Cruise Association region as a World Class Destination

Market and promote the ACA region (Australia, New Zealand, the South Pacific and ASEAN) as an attractive and diverse cruise destination for world class cruising.

Membership

Grow membership and provide high value benefits and services to ACA members.

Stakeholder and Partnership Development

Develop and maintain collaboration and affiliation with stakeholders and partners.



Chief Executive Officer's Report

It has been another busy year for our association. We welcomed 13 new members including key port members on the east coast, NSW Ports, Port of Brisbane and Gladstone Ports.

A major highlight was delivering one of the key desired outcomes of our MOU with CLIA, the joint economic impact study of the cruise sector in Australia, alongside the member only supplementary paper into the regional impacts of cruise. This has enabled the industry to be consistent through all major discussions relating to infrastructure and tourism projects.

Our industry workshops and forums have continued to reap rewards with cruise line shore excursion programs offering more extensive and bespoke experiences in our destinations. The operators are developing a better understanding of the sector and partnerships are being solidified.

Our key activities and achievements for 2017-18 are as follows:

Leadership and Governance

Representation on the NSW Government's Cruise Industry Reference Group that delivered recommendations to Government at the end of 2017, was key to ensuring that the national interests of our members were represented and ensured a focus on the critical effect the NSW infrastructure has on the entire industry development. That position has now progressed to being part of the industry engagement on the Cruise Development Plan.

We participated in a number of member driven demand studies and projects including the Geelong Cruise Ship Destination Demand Study, Sydney's Industry Business Case Study and Air and Noise Mitigation Strategy and the Cairns Market Sounding project. Being part of these programs ensures that a balanced representation of member views is communicated.

ACA continued to be represented on the National Sea Passenger Facilitation Committee.

Research and Insights

The 2017 Conference was held in Mooloolaba in September and was sponsored by Visit Sunshine Coast, Tourism and Events Queensland and Sunshine Coast Council. The conference, themed "Together Towards Tomorrow", attracted 110 delegates from Australia, New Zealand, Papua New Guinea, Indonesia, Switzerland and USA.

The amazing line up of speakers included Steve Odell from Norwegian Cruise Holdings and also Chairman of CLIA, Matt Grimes from Viking Cruises, Bruce Krumrine from Holland America Group and Sarina Bratton from Ponant Yacht Cruises & Expeditions.

ACA commissioned a report into the future consumer demands and travel trends. Consultant and ACA member Tammy Marshall from The BHive presented the findings and ran a member workshop on developing destinations to meet the needs of the future cruiser.

Marketing

ACA continued our consultancy agreement with Barking Owl Communications which had us successfully involved in a range of media and communications activities throughout the year. Our fortnightly column in Cruise Weekly provides a prominent focus for our members and industry profile. We are now a regular source of comment on industry issues both nationally and internationally.

Familiarisation programs with cruise line executives remains a focus for ACA. This mostly occurred around our Mooloolaba conference with itineraries taking speakers to the heart of our destinations to experience what is on offer for their guests.

The Chairman and CEO led our largest ever delegation of members at Seatrade Cruise Global held in Fort Lauderdale in March. The event continues to remain the critical international marketing event for the organisation. Our meeting schedule was intense and we were able to broadly distribute the most recent tourism and infrastructure projects affecting cruise itineraries and operations.

In addition to the Seatrade Cruise Global event, ACA's State Tourism Sub Committee co-ordinated a workshop at Princess Cruises' head office in Santa Clarita. The event was an enormous success and engaged with a range of departments focussed on deployment, marketing, product and sales. ACA hopes to role out similar programs with other cruise lines in the future.

We were represented at Seatrade Cruise Asia 2017 in Shanghai in November and gathered useful knowledge of the Asian environment.

Growing Membership

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

We continued to run our industry forums around the country, educating government departments, local councils and tourism operators on the cruise sector and assisting in developing exciting and cruise ready destinations.

The strong work delivered by the Management Committee resulted in a record thirteen new members joining the association. We said goodbye to some members, mainly in the bronze category who are no longer working in the cruise space. The overall membership level remained constant with an increase in the critical port members that have a real impact on the coastal itinerary opportunities.



Stakeholder and partnership development

We have continued our commitment to meet with a range of government and industry stakeholders throughout the year. Our ongoing work with the Austrade department has seen cruise included in national tourism data reporting.

Our strengthening relationship with CLIA is ensuring solid representation of all participants in the cruise sector and The New Zealand Cruise Association remains a valuable ally in the success of the region. New opportunities have emerged with leading port organisation, Ports Australia, highlighting the critical role that ports play in the access for tourism.

Partnership programs continue to be developed with cruise lines. This year has seen exciting food and gastronomy and behind the scenes experiences being developed with major lines.

The Management Committee has continued to deliver a strong strategic outlook and supported me in many operational areas. I look forward to delivering our 22nd conference in Broome in September 2018 and continuing the expansion, promotion and economic development of the Australian cruise industry.

Jill Abel
Chief Executive Officer

Cruise Shipping Overview



Global Cruising

A team of ACA members attended the Seatrade Cruise Global Exhibition and Conference in March of 2018. The outlook for the cruise industry continues to be strong. Issues such as overcrowding and environmental concerns seem to be the key discussion points and Australia is not exempt from any of this. We will continue to work with CLIA to develop strategies for clear messaging and sensible processes behind these topics.

Australia continued to be mentioned as a growth market and very important piece of the global deployment strategies.

A summary of the global cruise industry:

- Reached 25.8 million passengers in 2017;
- Projecting 27.2 million passengers in 2018 (an 8% increase on 2017);
- When order books were opened in 2017, there were a record 73 cruise ships on order, and since March 2018 that number has surged to 106 through to 2027;
- Growth continues in the high end of the market with Ponant scheduled to have a fleet of 12 vessels by 2021, while Viking is aiming for a grand plan of 16 ocean ships by 2027;
- The average capacity is 2,470 guests with a cost of \$607 million;
- By 2020 more than 50 percent of all ships in service will carry 3,000 plus passengers;
- The total orderbook value is over \$64 billion, with 261,812 berths on order;
- 2018 is predicted to see a rise in traveller-friendly onboard technologies that enhance travel experiences;
- Target of 38 million passengers will be travelling on 434 ships by 2027;
- All companies are upbeat about the world economy, seeing strong growth, a rising stock market and lower levels of unemployment particularly in the USA. Europe is slowly emerging from recession. Asian economies remain strong;

- All cruise lines are concerned with over-tourism (destination degradation) as destinations such as Venice, Dubrovnik and Barcelona have reported a growing issue with local populations reacting adversely to rising numbers of tourists. According to the World Travel and Tourism Council, destination degradation is currently the number one issue for the industry. The cruise lines are working with these destinations to manage ship arrivals in these cities, however it was pointed out that in Venice a total of 30 million people visit per annum, with cruise delivering 1 million of these arrivals. Cruise guests also do not want to go to places that are overcrowded.

National and regional cruising

There is a real sense of balance and need to work co-operatively between cruise lines and ports given the high level of new ship builds and global congestion. Australia is still a very important part of the global itinerary planning as passenger ratings continue to be high in our region. There is also a continued desire for more shore excursion products and partnership programs to develop.

The new infrastructure projects in Brisbane, Eden, Cairns, Broome and Newcastle are welcome projects for our region. They will have positive impacts on coastal itineraries and all year round cruising from the major lines as well as opening opportunities for the luxury and expedition markets.

Issues such as overcrowding and environmental concerns are key discussion points and Australia is not exempt from any of this. We will continue to work with CLIA to develop strategies for clear messaging and sensible processes behind these topics.



The source markets in our region are still very strong with Cruise Lines International Association (CLIA) reporting that 1.34 million Australians took an ocean cruise in 2017, topping the global cruise industry for market penetration with 5.7 per cent of the population, or 1 in every 18 Australians, taking an ocean cruise in 2017. 34% of Australians cruising, took a purely domestic cruise, which was on par with cruising to the South Pacific. This has major beneficiaries to the domestic market with an increased number of regional ports and destinations being visited.

Excitingly, there is also a strong push by the major cruise lines to reinvigorate the international markets to fly cruise in our region.

State Reports

NEW SOUTH WALES

New South Wales enjoyed another strong cruise season in 2017-18 with the State's four principal cruise ports welcoming a total of 368 cruise ship visits equating to 395 cruise ship days spent in NSW ports. A total of forty-four individual cruise ships visited the State with all four ports enjoying maiden visits.

Sydney maintains its position as Australia's pre-eminent cruise destination, hosting 341 cruise ship visits equating to 368 cruise ship days in port. Seven vessels visited Sydney for the first

time, including *Ocean Dream* (Peace Boat) and luxury cruise line Silversea Cruises' new flagship, *Silver Muse*.

Sydney also continues to lead the way in visitor services at its two world-class cruise facilities with the introduction of Virgin Australia check-in and bag drop facilities for all domestic flights at both the Overseas Passenger Terminal at Circular Quay and the White Bay Cruise Terminal.

For the first time in Australia, Sydney now offers a seamless transition for cruise passengers from ship to onward flight.

Two new instructional videos about the check-in and boarding procedures at Sydney's two cruise terminals were also produced during the year, advising passengers on what to expect before they travel and highlighting the ease of the process. These resources will also be beneficial to travel agents, cruise lines, tour operators and their customers.

Other highlights of Sydney's 2017-18 cruise season include Port Authority of NSW's implementation of a new automated cruise booking system allowing cruise agents to book berths at Sydney's two terminals up to three years in to the future. The system is linked to the agency's online cruise schedule with live updates appearing on the website.

Cruise Shipping Overview

The growth of New South Wales' regional ports as cruise destinations continues with new infrastructure projects in Newcastle and Eden entering the construction phase and due for completion in 2019. Both ports have seen an increase in cruise bookings in 2017-2018 as well as the continued development of their on-shore activities.

Newcastle welcomed 11 cruise ship visits during the 2017-18 season, double the number in 2016-17, which delivered more than 20,000 passengers. Three ships, the *Pacific Eden*, *Regatta* and *Norwegian Jewel*, visited the port for the first time in early 2018. Forward bookings show this growth is set to continue in the 2018-2019 season, with 15 ship visits and 27,000 passengers scheduled including maiden visits from *Caledonian Sky*, *Viking Orion*, *Black Watch*, *Le Lapérouse*, *Explorer of the Seas*, *Seabourn Encore* and *MS Noordam*.

Explorer of the Seas, the second largest ship cruising the Australian and Pacific coast, makes its maiden visit to the Port of Newcastle in February 2019. The vessel will return to Newcastle in 2020 and highlights the Port's capability to handle the largest Voyager class cruise vessels in operation and its ability to accommodate further growth in coming years.

Construction of the Newcastle Cruise Terminal is due to commence in the second half of 2018. The new terminal will feature state-of-the-art facilities and will be capable of hosting ships carrying more than 3,900 passengers. The construction is expected to take 12 months. Following its completion, the Newcastle Cruise Terminal will offer home porting facilities and establish Newcastle as a world-class international cruise destination.

Eden, on New South Wales' south coast, also enjoyed a strong season with 14 cruise ship visits that saw more than 20,000 passengers disembark and participate in on-shore activities. *Pacific Explorer*, *Norwegian Jewel* and *Oceania Regatta* all made maiden voyages to the port during the season and this trend will continue in 2018-2019 when 17 ship visits are scheduled including first visits from six ships – *Caledonian Sky*, *Silver Muse*, *MS Amadea*, *Crystal Serenity*, *Viking Sun* and *Seabourn Encore*.

Construction of the new wharf extension, expanding berthing capacity to ships up to 325m in length and providing land access for passengers without the need for a tender, is due to be completed in February 2019 promising further growth in visits in 2019-20 and beyond.

In its second year as a cruise port, Wollongong welcomed two ship visits and 5,810 passengers. *Radiance of the Seas*, emanating out of Auckland brought a high number of international visitors enjoying their first visit to Australia, while *Explorer of the Seas* was the largest cruise ship to ever visit Wollongong.

Passengers at Wollongong were met by 167 of the city's award-winning Destination Wollongong / IRT Ambassadors who offered advice on how to make the most of their visit and explore what the city has to offer. This commitment to service also extended to Ambassadors being present at Sydney's Overseas Passenger Terminal on embarkation day to hand out cruise visit maps of Wollongong, allowing passengers the opportunity to plan their day well before their arrival into Port Kembla.

Wollongong will again welcome two cruise ships during the 2018-19 season and has already commenced planning for the maiden voyage of *MSC Magnifica* in 2020.



NORTHERN TERRITORY

Australia's Northern Territory has welcomed around 60,000 passengers plus crew on 41 cruise ship visits to the Port of Darwin in 2017/18.

Darwin is also a growing hub for smaller expedition vessels exploring the Coastline of North Australia during the dry season (May-September).

Darwin is Australia's Northern Gateway Port. Darwin also remains an important stop on circumnavigations of Australia, with a range of ships agents, providores, fuel suppliers and other service providers available.

The Darwin skyline continues to evolve with modern developments and offers a positive sense of arrival.

A vibrant Waterfront precinct is active and appealing with lagoon swimming, a wave pool and an excellent collection of restaurants and retail offerings. There is a covered walkway from the cruise terminal that has created a positive walkable connectivity from the terminal



to the Waterfront precinct and to a glass lift and Air Bridge that connects to the City precinct.

The Department of Tourism and Culture works closely with Darwin City stakeholders to ensure that on ground activities are active when cruise vessels are in port. Tourism Top End, the Regional Tourist Association, coordinates meet and greet volunteers at the Cruise Ship Terminal and in the City.

There are an increasing and diverse number of touring options available for the cruise sector. The famous Jumping Crocodiles of the Adelaide River, Litchfield National Park, WWII Heritage tours, City sights touring and The Museum of the Northern Territory are all touring highlights.

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 and has been included as a pre and post cruise option.



QUEENSLAND

Made up of 600 kilometres of coastal shoreline and 14 captivating destinations for cruise passengers to explore, Queensland truly is beautiful one day and perfect the next! Home of the world famous Great Barrier Reef and heritage-listed rainforests, Queensland is a giant living and breathing postcard, waiting to be explored.

More than 830,000 cruise passengers visited Queensland destinations in 2017-18, injecting a significant economic benefit. Queensland welcomed nearly 500 cruise ship days across the state in 2017-18. The 2017-18 year saw a 29% increase in the number of ship

days on the year prior, and while the growth rate has decreased, Queensland welcomed a record number of ships in 2017-18. Overnight calls continued to grow for Trinity Wharf in Cairns, Townsville recorded double the number of ships than the year before and the Whitsundays, famous for their warm welcome from their volunteer greeters, provided exceptional visitor experiences that cement their place in international itineraries.

The Queensland government continues its focus on growing cruise ship visits, developing infrastructure and creating unique experiences. To ensure Queensland can optimise the opportunities in the cruise shipping

Cruise Shipping Overview



market, several infrastructure projects are currently underway. The \$158m Brisbane International Cruise Terminal project, is currently under construction and is expected to be operational in early 2020. The Port of Brisbane project will cater to mega cruise ships more than 270m in length. Tropical North Queensland is also undergoing change, with plans for Ports North's \$120m Cairns Shipping Development Project and also the Port of Townsville's \$520m project to widen and deepen the port access channel, both being financially supported by the Queensland government.

Queensland's suite of destinations includes Brisbane, Moreton Island, Mooloolaba, Bundaberg, Gladstone, The Whitsundays, including Hamilton Island, Townsville, Cairns, Yorkeys Knob, Port Douglas, Cooktown and Thursday Island. Each offer a unique local experience, a warm welcome and access to world renown natural wonders.

There is something for everyone and cruising the Queensland coast is definitely one of those 'bucket list' experiences.

SOUTH AUSTRALIA

South Australia remains an appealing destination for cruise ship visits and continues to grow year on year. The state hosted another very successful cruise ship season from October 2017 through to March 2018, with a total of 65 cruise ship visits to Adelaide and the regional ports of Kangaroo Island and Port Lincoln. The season featured two visits (including an overnight stay) from the *Ovation of the Seas* and a maiden visit from the *Norwegian Jewel*.

There were 14 maiden cruise ships visits to South Australia overall. The luxury vessels, *l'Austral* and *Azamara Journey* both called into Adelaide and Kangaroo Island for the first time, the *Seven Seas Navigator* to Adelaide and Port Lincoln, and the Holland America Line's *Noordam* undertook a maiden visit to all three of our South Australian ports on one itinerary.

We are seeing domestic itineraries grow with P&O Cruises' *Pacific Eden* offering eight cruise itineraries from Adelaide, including two return Adelaide itineraries each visiting the South Australian ports of Kangaroo Island and Port Lincoln.

Cruise and Maritime Voyages (CMV) continued to homeport again this year in Adelaide, with the *Astor* cruise ship offering five itineraries in early 2018. CMV have been a great supporter of cruising in South Australia over the past five years, and in December 2017 were the first cruise line to open an Australian head office in Adelaide.

Princess Cruises, on the *Golden Princess*, offered the first international cruise to/ from Adelaide in January 2018 with a round trip voyage to New Zealand. This was a very popular itinerary and will be offered once again in the coming season.

The South Australian Tourism Commission continues its focus on growing cruise ship visits, developing infrastructure and adding new products at all South Australian ports.

The South Australian government is committed to supporting the cruise lines and wider cruise industry to cater for the increase in turnaround visits and larger ships visiting our state. We will continue to upgrade services, as well as add new amenities and technologies for both passengers and crew over the coming year.

Regional dispersal remains a high priority. In partnership with our stakeholders, we will continue to develop the experiences on offer at regional ports through educating local communities and businesses about the benefits of leveraging the growing cruise industry.

Kangaroo Island continues to prove a popular choice for both domestic and international cruise itineraries. Reaching an all new record of 19 visits this season, the destination is growing year on year, with 30 visits scheduled for the next season including maiden calls from the *Azamara Quest* and *Crystal Symphony*.

Port Lincoln – the Seafood Capital of Australia, hosted 9 cruise ship visits this season, and is looking at 13 cruise ships already scheduled for the next season.

The state government and private partnerships fostered through our 'Team South Australia' cooperative approach provides support to all stakeholders in the Australian cruise industry and continues to drive success, developing further opportunities for the state.



TASMANIA

Tasmania continues to grow as a highly appealing cruise destination with cruise shipping doubling in the last two years. Cruise visits to Tasmania have risen from 57 port calls in 2015-16, to 92 port calls in 2016-17, and a record 125 cruise ship visits across 6 ports and anchorages between October 2017 and May 2018.

Hobart received 59 port calls, while 30 ships visited Burnie and 26 visited Port Arthur. Eight ships called at Wineglass Bay and one ship, Ponant's *L'Austral*, visited Beauty Point and King Island.

Hobart enjoyed 20 overnight visits and maiden calls by Norwegian Jewel, Pacific Explorer and Ocean Dream.

The Macquarie Wharf No.2 Cruise Terminal in Hobart continues to provide a streamlined disembarkation for visitors who are welcomed by enthusiastic volunteers providing a friendly 'meet & greet' service and improved logistics for shore excursion coaches.

The terminal is now able to provide baggage screening and customs

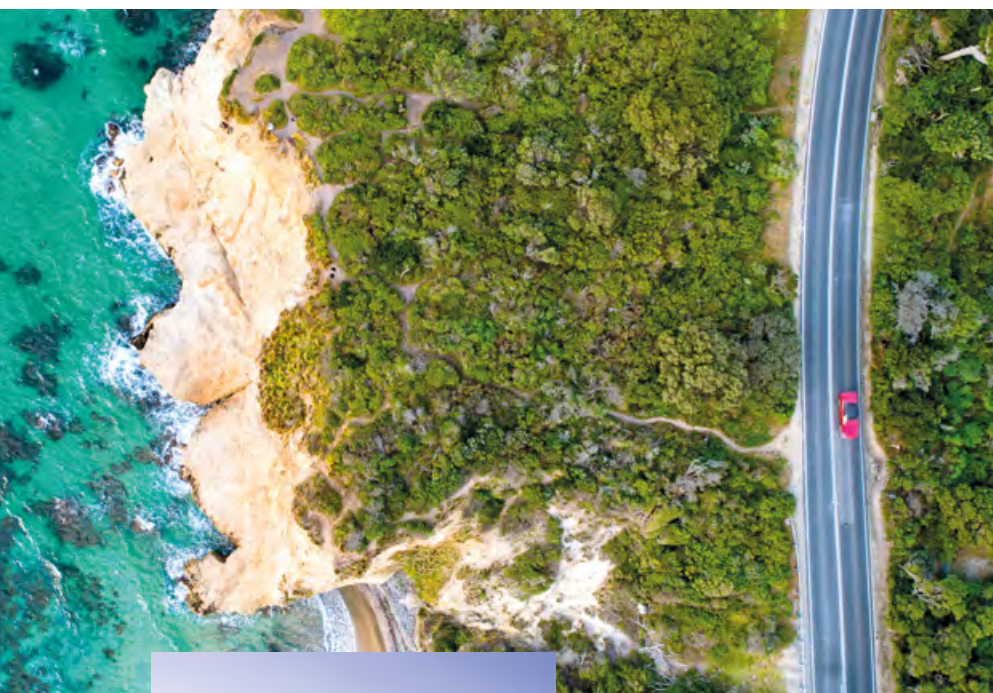
processing for up to 700 passengers to join or depart a cruise ship in Hobart. Tourism Tasmania and Tasports are committed to supporting the cruise industry and cruise lines to increase partial turnarounds for vessels in Hobart and increasing overnight stays in the vibrant port city.

Regional visitation is a high priority for the Tasmanian Government and the cruise industry is supporting these goals by increasing visits to Burnie and Port Arthur.

Burnie celebrated its' biggest ever cruise season with 30 visits (up from 19 the year before) including five visits from Norwegian Jewel, the largest vessel to ever call at Burnie.

Port Arthur continues to develop a strong relationship with Carnival Corporation with increasing visits from P&O Australia, Princess Cruises, Holland America and Seabourn. In December 2017, Port Arthur Historic Site opened its new visitor centre, featuring a larger cafe with outdoor dining, new separate restaurant overlooking the site, a new gallery and exhibition space and a retail space with products from the Tasman region.

Cruise Shipping Overview



Tourism Tasmania is working with other regional ports and anchorages on developing shore experiences and programs for expedition and small cruise ships.

L'Austral's visit to Beauty Point was the first call to the port in five years. It followed completion of remediation works at the berth that can now tie up vessels to 140 metres LOA. The anchorage is also suitable for larger vessels and an exciting and varied shore excursion program has been developed for enquiring cruise lines.

Tourism Tasmania, Tasports, local councils and tourism operators continue to work cooperatively, ensuring a coordinated approach in working with the cruise industry. New resources developed for industry in 2017-18 include an updated guide for cruise lines providing information to assist with itinerary planning and covering all Tasmania's ports and anchorages, and a guide to assist local tourism operators to engage and work with the cruise ship sector.

VICTORIA

The 2017-18 cruise season once again saw an increase in cruise ship arrivals to the state. The total number of visits to Victoria was 116, with 109 of these visits to Melbourne and seven ships visiting regional Victoria. The most significant increase was in turnaround visits with 50 visits being recorded. These turnarounds were predominantly undertaken by Carnival brand ships. Cruise shipping in Victoria is at record levels and is forecast to continue to grow, with more cruise lines committing to the Australian market.

A total of 236,138 passengers and 100,598 crew bringing the total number of cruise industry related visitors to 336,736 in 2017-18.

The economic contribution of the cruise industry to the Victorian economy from the 2016-17 season was estimated to be \$190 million.

Melbourne is a marquee Australian destination, with cruise lines continuing to visit on both transit and turnaround calls.

Regional Victoria is becoming increasingly popular for ship calls and last season seven ships called at regional destinations, with Geelong receiving four visits and Rhyll anchorage at Phillip Island receiving three calls. The visits from cruise ships to regional destinations has strong support from the local tourism industry and the community, with the large ships creating a spectacular backdrop in harbours or anchored offshore.

In all regional Victorian destinations the tourism industry participated in the shore excursion programmes offered by the cruise line, whilst local retailers enjoyed increased patronage on the day of the call.

Visit Victoria's marketing activity in 2017-18 included attendance at Seatrade Cruise Global in Fort Lauderdale and sales calls to cruise lines based in Santa Clarita.

Ground handlers also play an important role in facilitating shore excursions for the cruise lines.



Visit Victoria continues to work with the cruise lines and grounds handlers to introduce new products and experiences for all ports of call.

In 2017-18 Visit Victoria was established as a government owned company, with three organisations being merged. These were Victorian Major Events Company, Tourism Victoria and Melbourne Convention Bureau.

The Victorian Ports Corporation (Melbourne) was established in November 2016. A government corporation, it is responsible for the management of cruise shipping and Station Pier as well as shipping management and navigation in the port of Melbourne. Its creation followed the lease of the commercial operations of the port to a private company.

The Victorian Ports Corporation (Melbourne) continues to lead the Melbourne Cruise Ship Committee and coordinates key service providers to the cruise lines, including transport, the Cities of Melbourne and Port Phillip, ground handlers, shipping agents and federal government agencies such as Australian Border Force and Department of Agriculture and Water Resources.

WESTERN AUSTRALIA

Western Australia's Mediterranean climate in the south, tropical climate in the north and 12,500 kilometres of mainland coastline makes it an extraordinary year-round cruise shipping destination. Each of WA's nine active ports; Fremantle, Albany, Broome, Bunbury, Busselton, Esperance, Exmouth, Geraldton and Port Hedland, offers distinct and diverse tourism experiences for the growing number of cruise visits.

In 2017-18, Fremantle Ports welcomed 43 cruise ships, including maiden calls by six superliners, Regatta, Ocean Dream, Azamara Journey, L'Austral, Seven Seas Navigator and Golden Princess. In December 2017, Cruise & Maritime Voyages (C&MV) Astor sailed into Fremantle for a fifth season, and schedules released for 2018-19 will see Astor in Fremantle for a final season before being replaced by C&MV's Vasco De Gama in 2019-20.

Cunard's Queen Mary 2 returned to Western Australia in February 2018, visiting Fremantle and the south west port of Busselton for a second time. Cruise ship guests visiting Busselton are able to take part in shore excursions into the spectacular Margaret River region.

The growth in popularity of cruise shipping opens up opportunities to grow pre and post-cruise visitation to Perth and regional Western Australia. A mix of loyal and new cruise guests are joining cruises from Australia's eastern states and overseas, along with local residents who appreciate the opportunity to join cruise ship itineraries from Fremantle.

Looking ahead, there will be a total of 28 cruise ship visits, including 18 in regional areas – a major boost for WA cruising.

Sun Princess will be based in Fremantle for a burst of cruise itineraries in October and November 2018, including visits to Albany, Busselton, Geraldton, Exmouth and Broome. The superliner will also be back in Fremantle for a record 141 days in 2019-20.

On the infrastructure front, the Fremantle Passenger Terminal building is undergoing a \$3 million refresh with internal and external improvements scheduled in 2018. A new central canopy, repainted façade, 800 new chairs, updated signage and new flagpoles and banners will soon greet cruise ship passengers entering the iconic building. The work is planned to be completed in time for the 2018-2019 summer cruise season.

Cruise Shipping Overview

Tourism Western Australia is delighted to have the opportunity to host the Australian Cruise Association Conference in Broome, Port of Pearls, in September 2018. It is timely to showcase Broome with the Port of Broome set to receive a \$7 million upgrade to enable 24-hour cruise ship access. The work involves dredging the port channel to remove the rock mass that reduces the under keel clearance of vessels accessing the port, and is scheduled for completion in the final quarter of 2018.

Providing reliability for cruise ships to visit Exmouth and the World Heritage listed Ningaloo Reef has been described as 'a game changer' for cruise shipping in WA.

Potential solutions are being investigated to make the Exmouth Gulf a more reliable anchor and tender destination.

Geraldton is now being marketed as a 'berth' destination with the use of Mid West Ports Authority Shore Tension Units (STU's). This has achieved Geraldton Port's objective to be a 'reliable port' for itinerary planners when they are considering Western Australia as a destination. Mid-West Ports Authority are currently in the process procuring a 'cruise ship friendly' gangway made so that passengers of all mobility can safely disembark.

Following on from a successful pilot, Tour Guides WA accredited training program continues to be rolled out state-wide to community members interested in becoming accredited 'WA Shorex Guides.' Training is scheduled in Exmouth, Esperance and Fremantle later in 2018.

The Cruise Western Australia Committee continues to play an active role growing cruise shipping through implementation of Tourism WA's Two Year Action plan, which sets the direction for the development of a sustainable, coordinated and achievable future for the sector.



PAPUA NEW GUINEA

Papua New Guinea (PNG) saw 97 cruise calls to its shores in 2017, an increase on the last two years. PNG shores continue to welcome more cruise lines visiting the coastal island areas inclusive of Milne Bay, first port of call, and East New Britain both of which have been chosen as the tourism hubs. Expeditional cruises also continue to stretch to the islands of the Autonomous Region of Bougainville, while river cruises carry on along the coastal shores of Madang and Sepik River.

The PNG Government has recognised the need to improve port infrastructure and roads to enhance the cruise experiences of our visitors. The need to extend ports such as Milne Bay is on the way. This will enable the berthing of larger cruise ships that can then be welcomed to the area.

To assist with passenger information processing of visiting ships, PNG has rolled out a Mandatory Compliance Agreement which allows efficient processing of passenger information and cuts down the immigration process for visitors upon arrival. By doing this, visitors have more time to explore and experience the island.

PNG Tourism Promotion Authority (PNGTPA,) being the lead agency, continues to perform marketing and promotional roles of destinations and additional tourist products for each

cruise destination. PNGTPA is excited to announce scoping of new cruise destinations. These include destinations like the Autonomous Region of Bougainville, Esa'ala and Samarai in Milne Bay, Duke of York and Pomio in East New Britain. These destinations were scoped for future cruise development of shore excursions. Additionally, product enhancement opportunities are endless in PNG for authentic PNG handicrafts as souvenirs. Partnering with stakeholders like the PHAMA (Pacific Horticultural and Agricultural Market Access) that enables visitors buying capacities easier in terms of cutting down time in customs and NAQIA clearance on certain artefacts. This has seen the development of the PNG Handicrafts Vendor Guide. Using this guide, vendors and buyers are able to determine handicraft items being sold or purchased are quarantine compliant. In this way, the local communities benefit from their products on sale.

PNGTPA envisages more community awareness activities for cruise destination communities so these communities are well prepared to receive visitors in preparation of village tours and site attraction visits as part of itineraries.



Management Committee 2017-18

From left: Grant Gilfillan (PANSW), Julie O'Brien (Tourism and Events Queensland), Thor Elliott (Fremantle Ports), Jill Abel (CEO), Anne McVilly (Port Arthur Historic Site), Tony Clementson (Tourism NT)
Absent: Martin Bidgood (Intercoast) and Jay McKenzie (Bob Wood Cruise Group).



Grant Gilfillan Port Authority of NSW

Term Expires 2018

With the amalgamation of Sydney, Newcastle and Port Kembla port corporations in July 2014, Grant Gilfillan became Chief Executive Officer and Director of Port Authority of New South Wales. He had previously been Chief Executive Officer of Sydney Ports Corporation (from 2008) and Newcastle Port Corporation (from 2013).

Before joining Sydney Ports Corporation in 2008, Grant worked in Africa, the Middle East and Europe (Romania) as a Senior Vice President, Managing Director and General Manager for DP World. Prior to this he served as Director of Operations for P&O Ports, Australia and New Zealand and as Managing Director of CSX World Terminals in Australia. Prior to that Grant was a mining engineer and mine manager in the NSW Hunter Valley and the north-west of Western Australia.

Julie O'Brien Deputy Chair | Queensland Government

Term expires 2018

Julie is Manager - Partnerships, in a shared position at Tourism and Events Queensland and the Department of Innovation and Tourism Industry Development. She works closely with Queensland's 14 cruise destinations to ensure Queensland is cruise-ready and meets the needs of the cruise passenger and cruise lines alike. Julie has over 25 years' experience in the tourism industry in both public and private sector and has worked with Tourism and Events Queensland for a total of 17 of those years. She has considerable cruise market experience and serves as the Deputy Chair of the Australian Cruise Association.

Thor Elliott Treasurer | Fremantle Ports

Term Expires 2019

Thor is the Trade Development Manager at Fremantle Ports. Thor has been at the Port for 30 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. Thor represents Australian Cruise Association and Fremantle Ports on the Cruise WA Committee.

Martin Bidgood Member | Intercruises Shoreside and Port Services

Term Expires 2019

Martin is the Regional Director Australia for Intercruises, an experienced global business offering first class ground handling and port agency services to the ocean and river cruise industry.

After obtaining a BA(Hons) degree in International Hospitality Management from Bournemouth University in 1999, Martin embarked on a career in the tourism industry, working for a variety of London based tour operators in both operations and product focused roles.

In 2009, Martin was appointed Intercruises' Regional Director UK & Ireland – overseeing all operations throughout the region. In March 2011, Martin relocated to Sydney to assume the role of Regional Director Australia, where he drives business growth in one of the world's fastest growing cruise regions.

Anne McVilly Member | Port Arthur Historic Sites

Term expires 2018

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 & 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.

Tony Clementson Member | Tourism NT

Term expires 2019

Tony is the Manager of the Destination Development, Top End unit with the Northern Territory Government Department of Tourism and Culture. His area of responsibility is to identify and motivate opportunities for the growth of the cruise sector for the Northern Territory. Key goals include the activation of the Northern Australian Coastal region and the motivation of Darwin as a cruise hub.

Jay McKenzie Bob Wood Cruise Group

Term Expires 2019

With over 25 years' experience in the travel industry, Jay, along with her business partner Tyler Wood, has created Bob Wood Cruise Group, a company dedicated to the implementation and management of professional ground logistics for international and domestic cruise lines, as well as working with tourism bodies to implement quality industry standards that cruise lines have come to expect.

To further support the industry Jay and Tyler have established 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. Jay is doing this through collaboration with her cruise line partners, STO's and the various training and education facilities within Australia.

Prior to forming Bob Wood Cruise Group Jay lived in New Zealand where she owned and operated her own retail travel agency.

Jill Abel Chief Executive Officer

July 2016 to June 2019

Management Committee 2017-18

Management Committee Meetings

The Management Committee held the following meetings:

132		24 July 2017	Melbourne
133	AGM	8 September 2017	Mooloolaba
134		18 October 2017	Teleconference
135		14 December 2017	Sydney
136		14 February 2018	Teleconference
137		24 May 2018	Brisbane

Attendance at Management Committee Meetings

Record of attendance at scheduled Management Committee meetings:

Member	Meetings Attended	Meetings Eligible to Attend
Stephen Bradford	2	2
Grant Gilfillan	5	5
Julie O'Brien	6	6
Thor Elliott	6	6
John McKenna	2	2
Tyler Wood	1	1
Jay McKenzie	4	5
Tony Clementson	5	6
Martin Bidgood	6	6
Anne McVilly	5	6
Jill Abel	6	6

Committees and Sub-Committees

Listed below is the allocation of responsibilities for the committees and sub-committees for the 2017-18 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, Deputy Chairman and Treasurer

Rule 40

Chief Executive Officer – Jill Abel

- Secretary of the Association
- Seatrade Cruise Global Convention
- Global Sales Missions
- Government Liaison
- Economic Impact Study
- Conference and AGM
- Management Committee meetings
- Website Management
- Travel Programs/Familisations
- Education
- Membership Development
- Media Spokesperson

Sub Committees

Rule 39

Sub Committee 1 Grant Gilfillan and Deputy Chairman Julie O'Brien

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

Sub Committee 2 Deputy Chairman Julie O'Brien, Anne McVilly

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

Sub Committee 3 Treasurer Thor Elliott and Chairman Grant Gilfillan

- Financial Management and Reporting
- Budget
- Insurance

• Sub Committee 4 Martin Bidgood and Jay McKenzie

- Membership and education
- Industry forums

Sub Committee 5 Tony Clementson and Jill Collins

- Communications strategy
- Implementation of public relations plan

Sub Committee 6 Anne McVilly, Christine Cole, Shayne Murray

- Annual Conference and AGM

Sub Committee 7 Tony Clementson and Jay McKenzie

- Annual Report

Sub Committee 8 Deputy Chairman Julie O'Brien

- State Tourism Organisation co-ordination

Sub Committee 9 Thor Elliott, John McKenna

- State Ports Organisations co-ordination

Vision Develop and grow Australia's position as a major world class base and appealing destination for cruise ships. Mission The Australian Cruise Association is a peak body representing the cruise shipping industry in Australia to realise the region's potential as one of the world's leading cruise destinations providing opportunities for ongoing sustainability. Objective To influence cruise and charter operators to develop itineraries to increase cruise visits in Australia. To achieve this, ACA has set itself the following five (5) key objectives	Focus 1 Leadership and Governance	Focus 2 Research and Insights
	Objectives	Provide ACA members with useful, accurate and meaningful research into the cruise sector
	Priority Projects 2017-18 <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 • Ensure sustainable resourcing to deliver Strategic Plan • Streamline financial reporting • Profile the role and success of ACA to industry, government and community • Undertake Committee succession planning • Ensure organisational development • Commence development of a National Cruise 5 year Plan 	<ul style="list-style-type: none"> • Deliver annual ACA cruise conference (incl. industry sessions) • Respond to Government inquiries • International Cruise Conferences (Fort Lauderdale and Asia) • Develop research outcomes in line with CLIA MOU • Facilitate key industry forums and education workshops • Assist with development of new tourism product • Implement stakeholder and member feedback • Review communications strategy
	Other Important Projects <ul style="list-style-type: none"> • Project ACA as the peak marketing body and primary connector of business-to-business • Continue to enhance relationships with Federal, State Governments, trade media, industry • Manage ACA's IP and maintain business integrity 	<ul style="list-style-type: none"> • Maintain a comprehensive customer database • Review options for additional research reporting
	Key Performance Indicators (KPI's) <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"> • Present executive summary of joint CLIA/ACA Economic Impact Study to members and stakeholders incl. Federal and State Governments • Host 2017 cruise conference in Mooloolaba Queensland
	Key Achievements 2017-18 <ul style="list-style-type: none"> • AGM conducted at Mooloolaba • New Chair (G Gilfillan) and Deputy Chair (J O'Brien) appointed • New Committee Members Jay McKenzie and Tony Clementson • Farewelled long-term committee members, Tyler Wood, Richard Schoonraad and John McKenna • Further 5 years of EDMG guaranteed • Designed structure for National Cruise 5 year Plan 	<ul style="list-style-type: none"> • Updated EPA presentation • Conference held at Mooloolaba • Updated Comms Plan • Delivered The BHive Cruise Industry Report exclusively to members • ACA developing new 'Best Of' experiences for HAL

Focus 3 Position and Market the ACA region as a world class destination	Focus 4 Membership	Focus 5 Stakeholder and Partnership Development
Market and promote the ACA region (Australia, New Zealand, the South Pacific and ASEAN) as an attractive and diverse cruise destination for world class cruising	Grow membership and provide high value benefits and services to ACA members	Develop and maintain collaboration and affiliation with stakeholders and partners
<ul style="list-style-type: none"> Investigate opportunities for a trade mission with STO's and ACA members in March 2018 in collaboration with Seatrade Cruise Global Participate at Seatrade Cruise Global Fort Lauderdale Convention Investigate ACA presence at Cruise Shipping Asia Implementation actions of communications strategy Update the Marketing Plan for 2017-18 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 Identify potential to 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) Continue to develop global alliances Leverage relationships with neighbouring regions (e.g. Asia) to maximise opportunities for the ACA region Establish a Port Sub-Committee Abide by CLIA MOU and seek future partnership opportunities In conjunction with CLIA and Ports Australia develop Industry Sustainability Guide for members Continue active participation in global cruise association networks
<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 Undertake Membership survey 	<ul style="list-style-type: none"> Engage with stakeholders' decision makers, Tourism Ministers, Shadow Ministers, Hon. Members Consolidate TA/AUSTRADE relationship
<ul style="list-style-type: none"> Attend Seatrade Global in Fort Lauderdale Meet with a minimum of 10 US cruise line executives Circulate US Sales Mission and Seatrade Conference reports Develop famils for cruise line executives 	<ul style="list-style-type: none"> Maintain membership satisfaction Increase membership numbers Circulate regular Member Updates 	<ul style="list-style-type: none"> Attend Federal Govt. working committee meetings Meet with Federal Ministers annually Circulate ACA News twice annually Attend meetings of Global Cruise Association
<ul style="list-style-type: none"> CEO presented Australian SWOT Analysis at Seatrade Global STO presentations to Princess Cruises team in Santa Clarita Developed new ACA Member Brochure Attendance at Seatrade Global meeting with 26 with cruise lines 	<ul style="list-style-type: none"> Welcomed 13 new members Hosted industry forums in Mooloolaba, Melbourne and Brisbane 	<ul style="list-style-type: none"> NSW Government's Cruise Industry Reference Group NSW Cruise Development Plan Attended NSPF committee meetings Established Ports sub committee Draft Sustainability Guide completed to be distributed in 2018/19 Attended Global Cruise Association meeting in Fort Lauderdale March 2018.

Project Reports

Australian Cruise Association Conference

The 2017 Conference was held in Mooloolaba in September and was sponsored by Visit Sunshine Coast, Tourism & Events Queensland and Sunshine Coast Council. The conference, themed "Together Towards Tomorrow", attracted 110 delegates from Australia, New Zealand, Papua New Guinea, Indonesia, Switzerland and USA.

Keynote presentations:

- Steve Odell – SVP and MD Asia Pacific, Norwegian Cruise Holdings
- Matt Grimes – ED Itinerary Planning, Nautical & Technical Operations, Viking Cruises
- Bruce Krumrine – VP Shore Excursions, Princess Cruises, Holland America Line, Seabourn
- Sarina Bratton – Chairman Asia Pacific, Ponant Yacht Cruises & Expeditions
- Tammy Marshall – The BHive

Other speakers included:

- Simon Latchford – Visit Sunshine Coast
- Janene Rees – Rees International
- Ted Blamey – Chart Consultants

Seatrade Cruise Global and Sales Calls

Seatrade Cruise Global was held in Fort Lauderdale from 5-8 March 2018. The event is ACA's key international business to business event. The extensive meeting schedule and the robust conversation and feedback resulted in one of our most successful missions to date. In addition to this ACA's State Tourism sub committee co-ordinated a successful workshop at Princess Cruises head office in Santa Clarita.

The extensive itineraries in Australia, that now cover all possible ports and anchorages, calls for in depth destination knowledge and requires support from all State Tourism Organisations in particular. We appreciate the significant contribution from member organisations that supported this years' show.

The event was attended by the following members:

- Grant Gilfillan - Chairman ACA
- Jill Abel – CEO, Australian Cruise Association
- Julie O'Brien – Tourism and Events Queensland
- Anne McVilly – Port Arthur Historic Sites
- Martin Bidgood – Intercruises
- Hans Van Pelt – Tourism Tasmania
- Christine Cole – Tourism WA
- Chris White – Tourism Victoria
- Leah Clarke – South Australia Tourism Commission
- Natalie Godward – Cruise Eden/ Destination NSW
- Capt. Trond Kildal – Ports North
- Irene Morgan – Destination NSW
- Rosalie Douepere – New Caledonia Tourism
- Alcinda Trawen – PNG

The following Australian Cruise Association members also had joint trade stands contributing to a broader regional theme:

- New Zealand Cruise Association
- PNG Tourism

Formal discussions were held with the following cruise lines:

- Princess Cruises
- P & O UK
- Holland America Line
- Royal Caribbean Cruises
- Azamara
- Carnival UK
- Cunard
- NCL
- Celebrity Cruises
- Silversea Cruises
- Saga Cruise Line
- Regent Seven Seas Cruises
- Oceania Cruises
- Seabourn Cruise Line
- Fred Olsen
- Ponant
- MSC Cruises
- Crystal Cruises
- Viking Cruises
- Noble Caledonia
- Residensea
- Virgin Cruises
- Windstar
- Lindblad Expeditions
- Carnival Cruise Lines

Economic Impact Study

In 2017 Australian Cruise Association (ACA) and Cruise Lines International Association Australia (CLIA) agreed that CLIA would deliver a single economic impact analysis of the Australian Cruise Industry, the Contribution of Cruise Tourism to the Australian Economy in FY2016/17 (CLIA 2017).

A unified approach to reporting on the growth of the Australian Cruise Industry will form the basis for ACA and CLIA to engage on key industry related developments and issues. A consistent methodology will facilitate comparisons with the impact of the industry in other major cruise markets around the world.

This 2016/17 supplementary study was jointly commissioned by ACA and CLIA to provide a more detailed analysis of the impact of the cruise industry. This study disaggregates the results down to the port and destination level to meet the needs of members and key stakeholders of both associations.

The 2016-17 Economic Impact Study reports:

- Total output of \$5.280 billion, including direct expenditure of \$2.659 billion.
- Total wages income of \$1.514 billion, including \$0.907 billion in direct income and \$0.607 billion in indirect and induced wages income.
- Total employment impacts of 21,259 full time equivalent positions (FTEs), including 12,235 direct positions and 9,024 indirect positions.
- Total value added impact of \$2.727 billion, including a direct impact of \$1.298 billion.



Table E.1 Australian Cruise Industry Statistics, 2016-17

Statistic	Value
Australian ports/destinations visited	42
Visiting Cruise Ship Characteristics	
Number	50
Passenger capacity	79,022
Number of crew	33,445
Cruise Ship Visits	
Home Port	567
Transit Port	630
Total	1,197
Cruise Ship Visit Days	
Home Port	588
Transit Port	716
Total	1,304
Passengers & Crew Visit Days	
Home Passengers	1,851,266
Transit Passengers	1,134,170
Total Passenger Visit Days	2,985,436
Crew	416,786
Total	3,402,222
Direct Expenditure (\$M)	
Home Passengers	\$976
Transit Passengers	\$174
Total Passenger Spend	\$1,150
Crew	\$40
Cruise Lines	\$1,470
Total	\$2,659

Source: Source: ACA, Individual Ports, CLIA (2017), AEC



Table E.2:
Summary of Direct Expenditure associated with the Cruise Shipping Industry in Australia, 2016-17

Port/Destination	Cruise	Visit Days		Expenditure (\$m)			
	Visit Days	Pax	Crew	Pax	Crew	Cruise Lines	Total
NSW							
Eden	14	15,259	1,099	\$1.11	\$0.04	\$1.07	\$2.22
Newcastle	5	10,095	2,810	\$0.73	\$0.11	\$1.25	\$2.10
Port Kembla	4	12,931	3,307	\$0.94	\$0.13	\$1.71	\$2.78
Sydney	358	1,279,631	143,426	\$682.30	\$16.70	\$820.98	\$1,519.98
Total	381	1,317,916	150,642	\$685.08	\$16.99	\$825.00	\$1,527.08
VIC							
Geelong	2	1,219	167	\$0.34	\$0.01	\$0.13	\$0.48
Phillip Is (Cowes)	4	8,964	745	\$2.47	\$0.03	\$0.11	\$2.61
Melbourne	107	223,663	31,280	\$68.70	\$4.00	\$116.26	\$188.96
Mornington Peninsula	3	4,680	397	\$1.29	\$0.02	\$0.00	\$1.31
Portland	6	7,992	3,037	\$2.20	\$0.14	\$0.80	\$3.14
Total	122	246,518	35,626	\$75.00	\$4.20	\$117.30	\$196.50
QLD							
Brisbane	172	424,743	57,201	\$166.90	\$5.20	\$279.74	\$451.84
Cairns	100	153,920	24,788	\$41.40	\$3.40	\$33.45	\$78.25
Cooktown	4	3,265	539	\$0.46	\$0.04	\$0.05	\$0.55
Fraser Coast	3	3,421	519	\$0.48	\$0.03	\$0.04	\$0.56
Gladstone	7	15,242	7,107	\$2.16	\$0.47	\$1.42	\$4.05
Mooloolaba	9	14,671	1,843	\$2.08	\$0.12	\$0.67	\$2.87
Moreton Is	32	52,394	6,472	\$7.42	\$0.43	\$1.11	\$8.95
Port Douglas	20	38,830	5,053	\$5.50	\$0.34	\$0.37	\$6.20
Thursday Is	7	2,208	395	\$0.31	\$0.03	\$0.07	\$0.41
Townsville	8	7,030	5,212	\$0.99	\$0.35	\$1.61	\$2.95
Whitsundays	62	99,982	20,400	\$12.90	\$1.30	\$1.16	\$15.36
Total	424	815,706	129,529	\$240.60	\$11.70	\$319.70	\$572.00
SA							
Adelaide	28	46,751	8,366	\$4.00	\$0.90	\$28.95	\$33.85
Kangaroo Is	16	17,901	2,137	\$9.13	\$0.11	\$1.04	\$10.29
Port Lincoln	5	7,973	3,665	\$4.07	\$0.19	\$1.81	\$6.06
Total	49	72,625	14,168	\$17.20	\$1.20	\$31.80	\$50.20



Port/Destination	Cruise Visit Days	Visit Days		Expenditure (\$m)			Total
		Pax	Crew	Pax	Crew	Cruise Lines	
WA							
Albany	13	15,813	3,878	\$1.74	\$0.18	\$2.29	\$4.21
Broome	22	23,385	4,862	\$2.80	\$0.30	\$6.84	\$9.94
Bunbury	1	1,229	359	\$0.14	\$0.02	\$0.31	\$0.46
Busselton	10	16,547	1,098	\$1.83	\$0.05	\$0.36	\$2.23
Esperance	14	14,460	3,993	\$1.60	\$0.18	\$2.51	\$4.28
Exmouth	7	5,734	476	\$0.63	\$0.02	\$0.00	\$0.65
Fremantle	70	143,681	17,008	\$75.40	\$1.30	\$81.23	\$157.93
Geraldton	13	19,415	6,454	\$2.14	\$0.29	\$10.73	\$13.16
Kuri Bay	2	2,037	171	\$0.22	\$0.01	\$0.30	\$0.54
Port Hedland	2	4,528	1,121	\$0.50	\$0.05	\$0.44	\$0.99
Total	154	246,829	39,420	\$87.00	\$2.40	\$105.00	\$194.40
TAS							
Burnie	17	22,355	9,939	\$2.32	\$0.54	\$7.47	\$10.33
Coles Bay	6	12,742	1,202	\$1.32	\$0.07	\$0.40	\$1.79
Hobart	70	137,240	18,804	\$18.80	\$1.40	\$35.36	\$55.56
Port Arthur	22	38,034	3,620	\$3.95	\$0.20	\$1.47	\$5.62
Total	115	210,371	33,566	\$26.40	\$2.20	\$44.70	\$73.30
NT							
Darwin	47	75,221	13,759	\$18.04	\$0.80	\$26.10	\$44.94
Elcho Is	2	62	19	\$0.01	\$0.00	\$0.00	\$0.02
Tiwi Is	2	62	19	\$0.01	\$0.00	\$0.00	\$0.02
Yirrkala	4	125	38	\$0.03	\$0.00	\$0.00	\$0.03
Total	55	75,471	13,835	\$18.10	\$0.80	\$26.10	\$45.00
Offshore Territories							
Norfolk Is	4	311	137	\$0.02	\$0.01	\$0.00	\$0.02
Total	4	311	137	\$0.02	\$0.01	\$0.00	\$0.02
Australia	1,304	2,985,747	416,923	\$1,149.40	\$39.50	\$1,469.60	\$2,658.50

Source: Source: ACA, Individual Ports, CLIA (2017), AEC

About Australian Cruise Association

Australian Cruise Association (previously Cruise Down Under) is the membership based, non-profit association, dedicated to marketing Australia and the South Pacific region as a destination for cruise ships.

In 1993 a small group of Australian and New Zealand ports and tourism organisations who had previously marketed their destinations separately to cruise companies, came together with the aim of having a single marketing presence at the annual Seatrade Cruise Shipping Convention in Miami, and promote the region under a single banner.

In the early years, the cruise brand "Cruising Down Under" obtained funding assistance from the Australian Tourist Commission (ATC), with the support of the Office of National Tourism (ONT). ATC also provided the Cruise Down Under Secretariat until 1997.

In November 1997 at Seatrade Pacific, the member ports and tourism organisations agreed to form a not-for-profit incorporated association to enable Cruising Down Under to continue to develop relationships with cruise lines.

In May 1998 the interim executive comprising of Mike Bartlett (Cairns Port Authority) as Chairman, Chris Drinkwater (Hobart Port) Deputy Chairman and Glenn Stephens (Fremantle Ports) Treasurer, was elected as the Management Committee.

Cruise Down Under was incorporated in Queensland in July 1998 with its own secretariat. Mike Bartlett was engaged to undertake the role of Secretary after retiring from Cairns Port Authority.

In the first 10 years, Cruise Down Under cemented its position as the peak marketing body for cruise tourism in this region. Through the 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.

As a maturing association, the Management Committee decided in 2005 that it was obliged to embark on a formal process to appoint an executive officer (front desk position) and as such, called for expressions of interest for a General Manager to deliver the Association's administration and marketing activities. The selection process resulted in Jill Abel from Abel Event Management & Promotion being appointed as Cruise Down Under's General Manager and the registered office of CDU was relocated from Queensland to Tasmania.

It was at this time that Mike Bartlett from Cruise Australian Waters bid CDU goodbye as he opted for semi-retirement. Mike will always be remembered for his dedication to cruise shipping and in particular the tireless



work he undertook in the formative years of Cruise Down Under. Mike was awarded Life Membership in 2007. Richard Doyle took on the role of Chairman, through to 2010.

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. Evda Marangos' term expired at the end of 2012 and the organisation recognised her tireless efforts over many years. Evda was integral in 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 and he was duly awarded Life Membership.





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. Chris White was invited to take on the role of Chairman for one year through to the 2014 election. At the 2014 AGM in Perth, the association appointed Stephen Bradford as Independent Chairman of CDU for a two year period.

Leah Clarke stood down from the committee in 2015 after serving her maximum six year term. Leah was a major contributor to the communications sub-committee and drove the communications strategy and resulting in the engagement of our communications consultants, Barking Owl.

At the 2015 conference in Darwin a proposal was put to the membership during a members' only workshop, to consider changing the name from Cruise Down Under to Australian Cruise Association. The new name put forward of Australian Cruise Association

was unanimously deemed to be a more appropriate descriptor of the entity and has seen a definite rise in the recognition and profile of the association and strength in membership growth. The new name was formally adopted at the 2016 AGM.

The association celebrated its 20th Anniversary conference in Sydney in 2016 with a superb conference that cemented the strength of the association and its members' commitment to the cruise industry in Australia.

The significant event culminated in fireworks and a stunning dinner on the forecourt of the Sydney Opera House. Richard Doyle, Evda Marangos and Judy Wood were appointed life members.

In 2017 the AGM and conference moved to Mooloolaba and celebrated the impact of cruise on regional Australian destinations. Stephen Bradford stood

down as Chairman, after guiding the association through a significant period in the associations history, including the signing of an MOU with CLIA, creating a strong and unified approach to continuing growth of the cruise industry. Grant Gilfillan was appointed his successor.

Tyler Wood retired after fulfilling his six year term and was replaced by business partner, Jay McKenzie, ensuring an ongoing link with Bob Wood Cruise Group.

The full history that outlines the formative years of the Association can be found at australiancruiseassociation.com

Record of past Annual General Meetings and Cruise Conferences

Year	Destination	No. of Attendees	Date
2017	Mooloolaba	110	6-8 September
2016	Sydney	135	7-9 September
2015	Darwin	121	2-4 September
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

ACA registered 88 members as at 30 June 2018:

Name	Person	Level	Member Since
AAT Kings	Lauren Walker	Bronze	2005
Abercrombie & Kent	Toby Biddick	Silver	2002
Australia Zoo	Erina Kilmore	Bronze	2017
Australian Pacific Touring	Rob Tandy	Bronze	2007
Australian Reef Pilots	Wel Gamble	Silver	1999
Australian Shipping Supplies	Richard Fader	Bronze	2006
Austrade	Aimee Castrission	Honorary	1993
Big Bus Tours Sydney	Agnieszka Lotocka	Bronze	2017
Bob Wood Cruise Group	Jay McKenzie	Silver	1998
BridgeClimb	Rosalind Pixley	Bronze	2013
Brisbane Cruise Wharf	Lee Butterworth	Platinum	2004
Bunbury Cruise Ship Committee	Mark Exeter	Silver	2013
Burnie City Council	Anne Langham	Gold	1998
Chart Management Consultants	Ted Blamey	Bronze	2011
Christmas Island Tourism Association	Linda Cash	Bronze	2008
Chris White		Honorary	2017
City of Greater Geelong	Roger Grant	Bronze	2001
City of Melbourne	Stephanie Hamilton	Silver	2014
Corporate Protection Australia Group	Jenifer Hasbun	Bronze	2014
Cruise Broome	Shayne Murray	Silver	2016
Cruise Eden	Natalie Godward	Silver	2001
Cruise Hunter	David Brown	Gold	2001
Darwin Port Corporation	Peter Dummett	Platinum	1995
Destination NSW	Phil Ventham	Platinum	1995
Destination Wollongong	Mark Sleigh	Silver	2016
Evda Marangos		Honorary	2016
Fantasea Cruising Sydney Harbour	Carlah Walton	Bronze	2016
Flinders Ports	Carl Kavina	Platinum	2009
Fremantle Ports	Thor Elliott	Platinum	1995
Gladstone Area Promotion and Development	Darryl Branthwaite	Bronze	2015
Gladstone Ports Corporation	Andrew Davis	Silver	2017
Glenelg Shire Council	Liz McKinnon	Silver	2010
Glenn Stephens		Honorary	2014
Great Southern Rail	Melanie Truman	Silver	2011
Hobart City Council	Alex Heroys	Bronze	2009
Hobart International Airport	Matt Cocker	Bronze	2016
ID New Zealand	Deborah Summers	Silver	2014
Inchcape Shipping Services	David Pratt	Silver	2016
Intercruises Shoreside and Port Services	Martin Bidgood	Silver	2011
Judy Wood		Honorary	2016
Kimberley Coastal Pilots	Capt. Craig Brent-White	Bronze	2017
Kuranda Scenic Railway	Ivana Andacic-Tong	Bronze	2008

Members' Register (continued)

Name	Person	Level	Member Since
Mike Bartlett		Honorary	2007
Mid West Ports	Brad Muir	Gold	2007
Mirvac Real Estate Pty Ltd	Gemma Bosworth	Silver	2017
Moonshadow Cruises & Port Stephens 4WD	Janene Rees	Bronze	2010
New Caledonia Tourism	Julie Laronde	Gold	2001
NSW Ports	Jason McGregor	Silver	2017
Papua New Guinea Tourism	Alcinda Trawen	Platinum	2005
Peddells Thursday Island Tours	Matt Connor	Bronze	2013
Pilbara Ports Authority	Richard Barrett	Silver	2015
Plaza Premium Lounges Australia	Stuart Vella	Bronze	2017
Port Arthur Historic Site	Anne McVilly	Gold	2007
Port Authority of NSW	Grant Gilfillan	Platinum	1993
Port of Brisbane	Brendan Connell	Platinum	2017
Port of Portland	Kara King	Silver	2007
Port of Townsville Ltd.	Jasmin Fry	Gold	2002
Ports Australia	Michael Gallacher	Honorary	2005
Ports North	David Good	Platinum	1993
Queen Victoria Market	Katie Tobias	Bronze	2016
Quicksilver Group	Megan Bell	Bronze	2017
Reef Magic Cruises	Jeff Cameron-Smith	Bronze	2013
Richard Doyle		Honorary	2016
Royal Botanic Gardens	Katherine Kominiarski	Bronze	2008
Sealink Travel Group and Captain Cook Cruises	Richard Doyle	Silver	2012
Skyrail Rainforest Cableway	Adam Letson	Bronze	2011
Solomon Islands Visitors Bureau	Ellison Kyere	Gold	2016
South Australian Tourism Commission	Leah Clarke	Platinum	1998
Sunlover Reef Cruises	Amy Davis	Bronze	2013
Sunshine Coast Destination Ltd	Samantha Dalla	Gold	2016
Sydney Opera House	Maria Haglund	Bronze	2015
Sydney Outback Tours	Paul Pickering	Bronze	2017
Tasports - Burnie/Devonport/Launceston	Kristy Little	Gold	1993
Tasports - Hobart	Kristy Little	Platinum	1993
The Australian Opal and Diamond Collection	Joseph Dimasi	Bronze	2002

Name	Person	Level	Member Since
The BHive	Tammy Marshall	Bronze	2017
The CaPTA Group	Ben Woodward	Bronze	2017
Thompson Clarke	Chris Raley	Bronze	2005
Tourism and Events Queensland	Julie O'Brien	Platinum	1994
Tourism Australia	Leigh Sorensen	Platinum	1993
Tourism Northern Tasmania	Chris Griffin	Bronze	2016
Tourism NT	Tony Clementson	Platinum	1998
Tourism Tasmania	Hans Van Pelt	Platinum	1998
Tourism Western Australia	Christine Cole	Platinum	1998
Townsville Enterprise	Bridget Woods	Gold	2017
Victorian Ports Corporation (Melbourne)	Evda Marangos	Platinum	2005
Visit Victoria	Chris White	Platinum	1998
Yorkeys Knob Boating Club Inc	David Galea	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 2017-18:

- Australia Zoo
- Big Bus Tours Sydney
- Gladstone Ports Corporation
- Kimberley Coastal Pilots
- Mirvac Real Estate Pty Ltd
- NSW Ports
- Plaza Premium Lounges Australia
- Port of Brisbane
- Quiksilver Group
- Sydney Outback Tours
- The BHive
- The CaPTA Group
- Townsville Enterprise



Acknowledgements

The Australian Cruise Association 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 2017-18.

- Bob Wood Cruise Group
- Fremantle Ports
- Intercruises
- Port Arthur Historic Sites
- Port Authority of NSW
- Tourism and Events Queensland
- Tourism NT



Annual Financial Report

for the year ended 30 June 2018

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Compilation Report

for the year ended 30 June 2018

Compilation report to Australian Cruise Association

On the basis of information provided by the client we have compiled in accordance with APES 315 'Compilation of Financial Information' the special purpose financial statements for Australian Cruise Association for the period ended 30 June 2018.

The specific purpose for which the special purpose financial statements have been prepared is set out in Note 1. The extent to which Accounting Standards and other mandatory professional reporting requirements have or have not been adopted in the preparation of the special purpose financial report is set out in Note 1

The Responsibility of the Directors

The Committee is solely responsible for the information contained in the special purpose financial statements and has determined that the accounting policies used are consistent with the financial reporting requirements of the company and are appropriate to meet the needs of the Committee

Our Responsibility

Our procedures use accounting expertise to collect, classify and summarise the financial information, which the Committee provided, into a financial report. Our procedures do not include verification or validation procedures. No audit or review has been performed and accordingly no assurance is expressed.

To the extent permitted by law, we do not accept liability for any loss or damage which any person other than the company may suffer arising from any negligence on our part.



PKF (Tas) Pty Ltd
Chartered Accountants

Dated: 17 July 2018

Income Statement

for the year ended 30 June 2018

	Notes	2018 \$	2017 \$
Income			
Conference Sponsorship		52,641	74,909
Grants Received		64,650	126,199
Interest Received		6,935	10,394
Total Income		124,226	211,502
Other Income			
Conference		101,997	102,916
Membership Fees		240,200	217,213
Other Income		49,509	44,759
Total Other Income		391,706	364,888
Total Income		515,932	576,390
Expenses			
Accounting and Audit		6,445	4,945
Administration		63,804	54,152
Annual Reports		4,077	4,412
Bank Charges		1,098	786
Committee Travel		1,299	3,105
Conference Expenses		87,449	174,466
Depreciation		1,950	-
EMDG and EIS Consultancy		21,600	23,420
Events and Venue Hire		10,821	10,607
Insurance		2,504	2,504
Marketing		189,543	204,185
Other Expenses		5,176	1,314
Printing and Stationery		5,794	10,664
Research Grants		0	62,891
Subcontractors		48,498	40,697
Subscription		56	617
Telephone		3,300	3,347
Travelling Expenses		29,822	31,002
Total Expenses		483,238	633,114
(Deficit/Surplus) from ordinary activities		32,694	(56,725)

Statement of Financial Position

as at 30 June 2018

	Notes	2018 \$	2017 \$
Assets			
Current Assets			
Cash and Cash Equivalents	2	568,083	535,053
Trade and Other Receivables	3	179,468	180,072
Total Current Assets		747,551	715,125
Total Assets		747,551	715,125
Liabilities			
Current Liabilities			
Trade and Other Payables	4	296,177	299,716
GST Payable	5	21,023	17,753
Total Current Liabilities		317,200	317,469
Total Liabilities		317,200	317,469
Net Assets		430,351	397,656
Equity			
Retained Surpluses		430,351	397,656
Total Equity		430,351	397,656

Notes to the Financial Statements

for the year ended 30 June 2018

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 2018

	Notes	2018 \$	2017 \$
2. Cash & Cash Equivalents			
Cash at bank and on hand		245,178	218,834
Bank short term assets - Deposits		322,905	316,219
Total Cash & Cash Equivalents		568,083	535,053
3. Trade and Other Receivables			
Trade Receivables		137,855	164,706
Prepayments		41,613	15,366
Total Trade and Other Receivables		179,468	180,072
4. Trade and Other Payables			
Memberships in Advance		254,195	242,200
Trade Payables		11,982	-
Other Payables		30,000	37,607
Other Amounts Received in Advance		0	19,909
Total Trade and Other Payables		296,177	299,716
5. Current Tax Liabilities			
GST		21,023	17,753
Total Current Tax Liabilities		21,023	17,753
6. Property, Plant and Equipment			
Office equipment			
Office equipment at cost		1,950	0
Accumulated depreciation of office equipment		(1,950)	0
Total Office equipment		0	0
Total Property, Plant and Equipment		0	0

Depreciation Schedule

for the year ended 30 June 2018

Name	Purchased	Cost	Cost Limit	Opening Value	Purchases	Disposals	Rate	Depreciation	Closing Accum Dep	Closing Value
Office Equipment										
Printer	04 May 2018	443	0	0	443	0		443	443	0
Toshiba Laptop	14 Nov 2017	1,507	0	0	1,507	0		1,507	1,507	0
Total Office Equipment		1,950	0	0	1,950	0		1,950	1,950	0
Total		1,950	0	0	1,950	0		1,950	1,950	0

Statement by Members of the Committee

for the year ended 30 June 2018

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 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 Australian Cruise Association as at the end of June 2018 and its performance for the year ended on that date.
2. At the date of this statement, there are reasonable grounds to believe that Australian Cruise Association 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

Sign date: 9th August 2018

Independent auditor's report to the members of the Australian Cruise Association

Opinion

We have audited the accompanying special purpose financial report of the Australian Cruise Association (the Association), which comprises the Statement of Financial Position as at 30 June 2018 and the Income Statement for the year then ended, including a summary of significant accounting policies and other explanatory notes, and the certification by members of the committee on the annual statements giving a true and fair view of the financial position and performance of the Association.

In our opinion the financial report presents fairly, in all material respects, the financial position of the Association as of 30 June 2018 and of its financial performance for the year then ended in accordance with the accounting policies described in Note 1 to the financial statements and the requirement of the *Associations Incorporation Act [Tas]*.

Basis of Accounting

We conducted our audit in accordance with Australian Auditing Standards. Our responsibilities under those standards are further described in the *Auditor's Responsibilities for the Audit of the Financial Report* section of our report. We are independent of the Association in accordance with the ethical requirements of the Accounting Professional and Ethical Standards Board's *APES 110 Code of Ethics for Professional Accountants (the Code)* that are relevant to our audit of the financial report in Australia. We have also fulfilled our other ethical responsibilities in accordance with the Code.

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

Emphasis of matter – Basis of Accounting

We draw attention to Note 1 to the financial report, which describes the basis of accounting. The financial report has been prepared to assist the Association to meet the requirements of the *Associations Incorporation Act [Tas]*. As a result, the financial report may not be suitable for another purpose. Our opinion is not modified in respect of this matter.

Responsibilities of the Committee for the Financial Report

The Committee is responsible for the preparation and fair presentation of the financial report and have determined that the accounting policies described in Note 1 to the financial statements, which form part of the financial report, are appropriate to meet the financial reporting requirements of the *Associations Incorporation Act [Tas]* and the Association's constitution and are appropriate to meet the needs of the members.

In preparing the financial report, the Committee is responsible for assessing the Association's ability to continue as a going concern, disclosing, as applicable, matters related to going concern

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and using the going concern basis of accounting unless management either intends to liquidate the Association or to cease operations, or has no realistic alternative but to do so.

Auditor's Responsibility

Our objectives are to obtain reasonable assurance about whether the financial report as a whole is free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with Australian Auditing Standards will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of the financial report.

As part of an audit in accordance with the Australian Auditing Standards, we exercise professional judgement and maintain professional scepticism throughout the audit. We also:

- Identify and assess the risks of material misstatement of the financial report, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of internal control relevant to the audit 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 Association's internal control.
- Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by management.
- Conclude on the appropriateness of the Committee's use of the going concern basis of accounting and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the Association's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditor's report to the related disclosures in the financial report or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our auditor's report. However, future events or conditions may cause the Association to cease to continue as a going concern.
- Evaluate the overall presentation, structure and content of the financial report, including the disclosures, and whether the financial report represents the underlying transactions and events in a manner that achieves fair presentation.

We communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.



NICK CARTER
PARTNER

WISE LORD & FERGUSON

Date: 10/8/2018

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 ACA cruise destinations and providers of services to the cruise industry.

For further information or advice we invite you to contact:

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