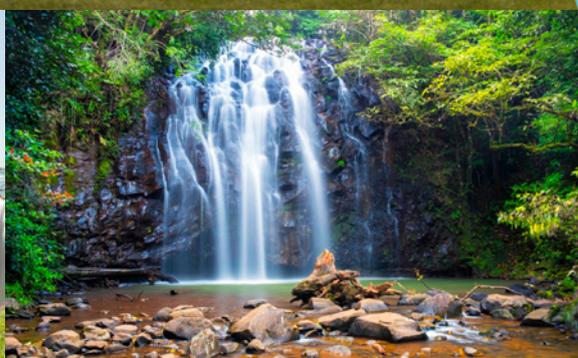




2018 2019

ANNUAL REPORT



australiancruiseassociation.com



**AUSTRALIAN
CRUISE**
ASSOCIATION



Message from the Chair

Dear Member,

With another successful year concluded, with the Association continuing to go from strength to strength, I am pleased to present my Chairman's Report for the Australian Cruise Association (ACA) for the period 1 July 2018 to 30 June 2019.

Infrastructure continues to be the critical topic in creating the opportunity for further growth of the cruise sector in our region. I stress the relevance to region as without a big picture approach to growth, we will not achieve all that is on offer. The new Brisbane International Cruise Terminal will be a game changer for Australia and together with the port dredging project in Cairns, the wharf developments in Townsville, Gladstone and Eden on the East coast and the Broome infrastructure project, things are looking bright. We are also closely watching the developments proposed in neighbouring New Zealand as this too plays a critical role in the region's growth. The NSW Government continues to progress the feasibility study into a third terminal in Botany Bay however, this is not going to provide near future outcomes.

With the cruise ship order books showing 122 new builds through to 2027, with 24 of them rolling out in 2019 and a target of 38 million passengers travelling on 434 ships globally by 2027, infrastructure and destination management will be high on everyone's agendas.

We continue to work with Cruise Lines International Association (CLIA) in releasing the economic impact assessment of cruise in Australia. The project continues to look at capturing additional data to build on the knowledge and value of the sector. The ACA State Tourism Organisation sub-committee is now working with their relevant research teams to look at ways to further enhance the report.

The work done in 2017/18 in strengthening the relationship with Ports Australia continues to have extremely positive outcomes. The importance of cruise in the port sector is a regular agenda item at Ports Australia meetings and conferences and we have been able to provide valuable sharing of knowledge through our CEO and our ACA Ports sub-committee.

Looking further afield, we also signed a MOU with the Global Port Network this year which represents port and destination associations in Europe. The Network's mission is to work collectively and collaboratively to share information and experiences which will help regions like ours to deliver best practice and mutually successful outcomes,

At Seatrade Cruise Global in Miami this year, I was invited to participate on a conference panel alongside Debbie Summers (Cruise New Zealand) and Joel Katz (CLIA), moderated by Sarina Bratton (Ponant), on the state of our region and discuss the challenges we face. Australia is no different to the rest of the globe in its challenges to keep pace with such a fast growing and innovative sector.

Our 22nd Conference, held in Broome last September, heralded as the "best ever", continued to showcase the important role that cruise can play in the dispersal of visitors throughout Australia. Our regional ports and anchorages are critical in the compilation of exciting and functional itineraries and Broome was the perfect example of this. The conference attracted an exemplary line up of speakers both from cruise lines and from industry experts.

Barking Owl continued to shout out our messages both domestically and internationally, supporting our membership base and positioning our association as a respected voice on domestic cruise issues. As such, we are being increasingly asked to comment in the media and our CEO, Jill Abel is an invited speaker at more and more conferences to represent our interests and share our knowledge.



Other significant achievements during 2018-19 were:

- welcoming eight new members
- delivering a hugely successful 22nd ACA conference in Broome with an exceptional program
- exhibiting at Seatrade Cruise Global in Miami in April 2019 and being invited to participate in a conference session
- holding a very successful “Aussie Day” at Royal Caribbean International head offices in Miami prior to Seatrade
- jointly delivering the second CLIA/ACA Report on the economic benefits of the cruise industry in Australia as well as a supplementary regional report
- continuing engagement with Tourism Australia to successfully market the destination globally and supporting with valuable research insights into the growing inbound cruise market
- engaging 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 Treasurer Thor Elliott, who at this year's AGM will have fulfilled his six years on the Management Committee. Thor took over the role from Life Member Glenn Stephens in 2013 and has been a prudent caretaker of the members' funds. With CEO, Jill Abel, Thor moved our accounting systems over to Xero and has set up a highly streamlined management system, ready to hand over to the next Treasurer. Not only has Thor been a solid Treasurer but has contributed enormous value to the committee on port related issues and has chaired the Ports sub-committee.

Thank you to our wonderful Management Committee members for their ongoing hard work and knowledgeable direction and we thank their organisations that support them in the role. Farewell to Jay McKenzie, who will not be standing again this year due to some changes in her business structure.

We were successful in renegotiating our CEO, Jill Abel's contract, ensuring that she will lead the association through until July of 2022. Thank you Jill for your continued commitment to the members and for fostering industry partnerships.

Finally, thanks to all of the ACA members for your ongoing support and commitment to the Australian cruise sector. I look forward to seeing you in Geelong in September at our 23rd ACA Conference where we will continue the discussion around the growth of our industry and explore the important economic contribution that cruise makes to the national, regional and local economies.

Yours sincerely

Mr Grant Gilfillan
Chairman
30 June 2019

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.



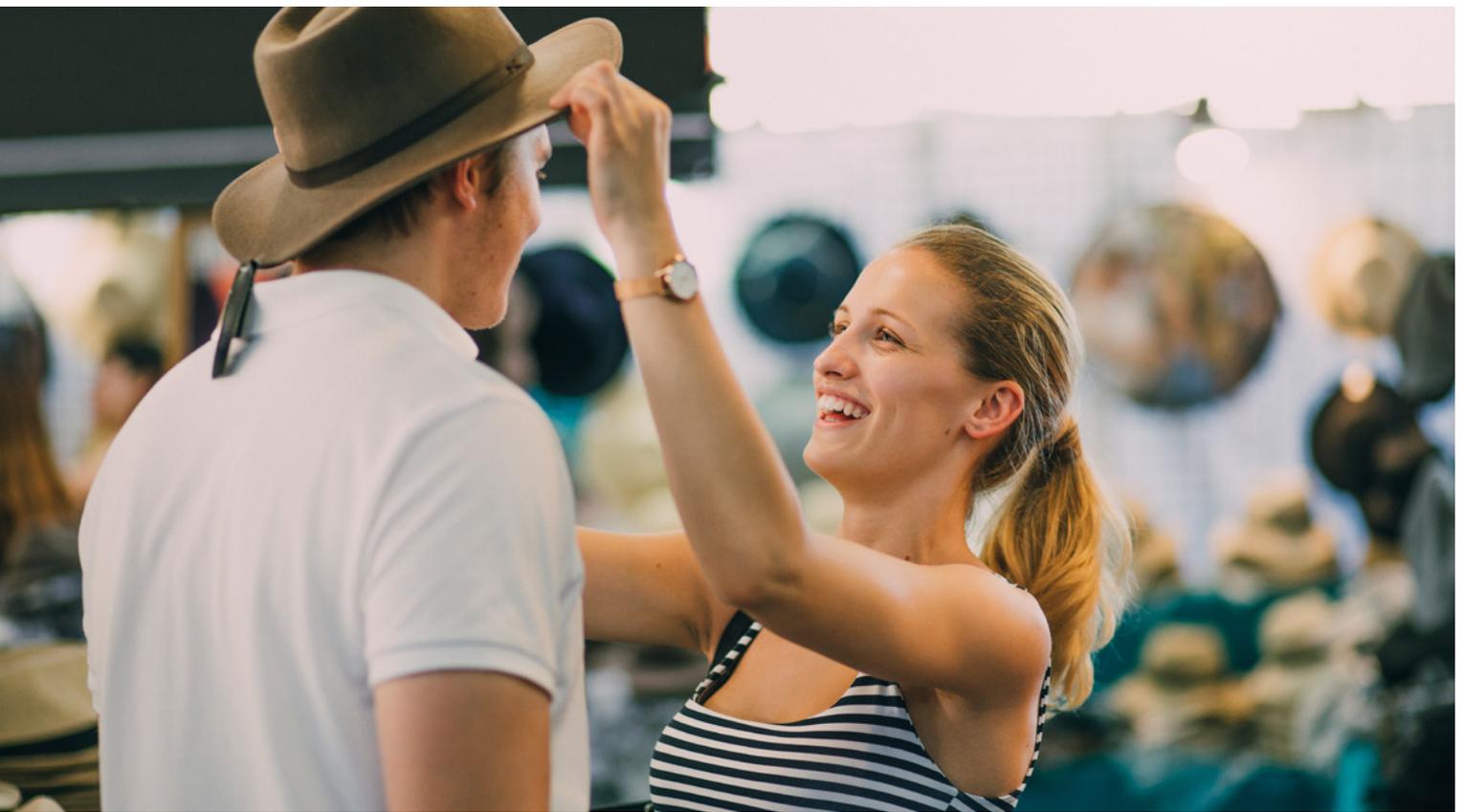


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Develop and grow Australia's position as a major world class base and appealing destination for cruise ships.



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:

1. Leadership and Governance

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

2. Research and Insight

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

3. 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.

4. Membership

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

5. Stakeholder and Partnership Development

Develop and maintain collaboration and affiliation with stakeholders and partners.



Chief Executive Officer's Report

The Association continues to grow each year and adapt to the cruise industry's fast pace, new itinerary development and ship evolution. We welcomed eight new members including key port member, Kimberley Ports Authority and developing destinations, Phillip Island and The City of Albany.

We have had a strong year presenting at a range of key industry conferences around the country including the Ports Australia Business and Operations Conference, Australian Indigenous Tourism Conference and Tasmanian Tourism Industry Council Conference. These presentations have increased the awareness of the importance of the cruise sector to the broader visitor economy and the critical role the ports play in the access and dispersal of visitors around our vast nation, in addition to the jobs that are created.

We have continued to produce great outcomes from our strong MOUs with CLIA and New Zealand Cruise Association. The three Associations jointly produced a Sustainability Guide that has helped provide a united voice on the positive directions the industry is taking on environmental controls, destination management and global tourism.

Our industry workshops and forums continue to roll out around the country having a positive impact on developing destinations for the cruise sector and ensuring cruise lines, businesses and communities can share in the benefits of cruise ship visits.

Our key activities and achievements for 2018-19 are as follows:

Leadership and Governance

We participated in a number of member driven consultancies, providing industry knowledge on cruise forecasts, future challenges and industry developments. ACA continued to be represented on the National Sea Passenger Facilitation Committee.

Research and Insights

The 2018 Conference was held in Broome in September and was sponsored by Tourism Western Australia, Cruise Broome and Kimberley Ports Authority. The conference, themed “Forging Stronger Relationships”, attracted 115 delegates from Australia, Papua New Guinea, Japan, Norfolk Island and the USA.

The amazing line-up of speakers included Sture Myrmell (Carnival Australia), Susan Bonner (RCCL), Timothy Littley (Seabourn Cruise Line), Mike Drake (P&O Cruises Australia) and Mike Gallacher (Ports Australia).

Marketing

ACA continued the consultancy agreement with Barking Owl Communications which has positioned us as a regular commentator on the Australian cruise industry on behalf of our members.

With the assistance of all of our state tourism organisations, we were able to deliver an outstanding range of familiarisation programs with cruise line executives around the country. Many of these occurred around the Broome conference.

The Chairman and CEO led another highly successful delegation of members to Seatrade Cruise Global in April. The event moved back to its original destination in Miami to the newly refurbished Miami Convention Centre. There was a strong representation from the cruise lines and our full meeting schedule had very positive outcomes.

In addition to the Seatrade Cruise Global event, ACA’s State Tourism Sub Committee co-ordinated an “Aussie Day” workshop at Royal Caribbean Cruise Lines’ head offices in Miami. The event was an enormous success and engaged with a range of departments focused on deployment, marketing, product and sales.

We were represented at Seatrade Cruise Asia 2018 in Shanghai in November and gathered useful knowledge of the Asian environment.

Growing Membership

The industry forums that we held in Sydney, Hobart, Melbourne and Broome during the year continued to engage with new tourism operators and port providers to further develop the understanding of how the cruise sector works. We were successful in welcoming eight new members, all of whom help to connect the dots around the country.

Stakeholder and partnership development

We have continued our commitment to meet with a range of government and industry stakeholders throughout the year. We provided feedback to the Beyond Tourism 2020 Report. It was encouraging to see that cruise was considered as an opportunity in the report. Our continued work with Austrade has seen cruise included in national tourism data reporting. More extensive work is also being undertaken with the STO research departments to further our ability to collect valuable data on the sector.



We signed a MOU with the Global Port Network this year in Miami. We have been instrumental in the establishment of that committee which provides us with a direct connection to similar associations globally. The information exchange opportunities are extremely beneficial, with both organisations sharing environmental and efficiency reports. With our ongoing work with CLIA, New Zealand Cruise Association and Ports Australia, our spread of connection is broad and effective.

The Management Committee has continued to have a strong vision for the association and provided great support to me in delivering the operational plan. I look forward to delivering our 23rd conference in Geelong in September 2019 and working with the membership and broader industry stakeholders to continue growing the cruise sector in our region.

A handwritten signature in black ink, appearing to read "J. Abel". The signature is fluid and cursive, with a large initial "J" and a long, sweeping tail.

Jill Abel
Chief Executive Officer

Cruise Shipping Overview



Global Cruising

A large team of ACA members attended the Seatrade Cruise Global Exhibition and Conference in April of 2019. 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 this. We will continue to work with CLIA to develop strategies for clear messaging and sensible processes behind these topics.

Australia continues to be seen as a strong and reliable region with continually growing commitments from the cruise lines.

A summary of the global cruise industry:

- Projecting 30 million passengers in 2019 (calendar year);
- Industry continuing to grow at 5-7% per annum;
- Order books are now at 122 new builds through to 2027 with 24 ships rolling out in 2019;
- Target of 38 million passengers on 434 ships by 2027;
- \$134 billion USD industry globally, \$5 billion AUD economic impact in Australia;
- Future travel groups include solo traveller, all female groups, working nomads, off peak adventurers and generation Z;

- Smart and conscious travellers looking for more than just ticking bucket list destinations;
- Australian percentage of global market remains at 5%.

National and regional cruising

Australia and our region continues to be a key focus for the international cruise lines. Whilst infrastructure developments continues to lag industry growth, as a destination, there has been some significant development activity. The Brisbane International Cruise Terminal will become the driving force to enable the next stage of cruise growth in Australia. With over 190 cruise bookings

currently in place for the 2020/21 season, the facility will have significant flow on effects to regional destinations.

Further support in infrastructure with the Cairns Shipping Development Project, the Eden Wharf Extension, the Townsville Port Expansion and the Broome Port Channel Optimisation Project will link strong itinerary development opportunities around the country.

The source market growth in our region saw similar flatlining (up 0.9%) to our port bookings with Cruise Lines International Association (CLIA) reporting that 1.35 million Australians took an ocean cruise in 2018. This represents one in seventeen Australians taking a cruise. The growth was limited by the domestic cruising opportunities however, the opportunity to grow this figure will become evident once the discussed infrastructure projects roll out. North America (up 9.4%) and Europe (up 3.4%) lead the globe in growth.

Growth in the expedition and luxury market continues with around 30% of the future new builds falling into this category, providing a well balanced industry that can offer all forms of experiences to the consumer. This market provides economic opportunities to some of our smaller and more environmentally sensitive areas.

State Reports

NEW SOUTH WALES

New South Wales enjoyed another strong cruise season in 2018-19 with the state's four principal cruise ports welcoming an estimated 355 cruise ship visits equating to 374 cruise ship days spent in NSW ports. A total of fifty individual cruise ships visited the state with Sydney, Eden and Newcastle all enjoying maiden visits.

Sydney maintains its position as Australia's pre-eminent cruise destination, hosting 323 cruise ship visits and accommodating more than 1.4 million passenger



exchanges. Six vessels visited Sydney for the first time, including *Majestic Princess*, *AIDAaura*, *Viking Orion*, *Silver Muse*, *Le Lapérouse* and *MSC Magnifica*.

Sydney continues to lead the way in visitor services, offering a seamless transition for cruise passengers from ship to onward flight with Virgin Australia check-in and bag drop facilities for all domestic flights at its two world-class cruise facilities - the Overseas Passenger Terminal at Circular Quay and the White Bay Cruise Terminal.

Infrastructure improvements at the Overseas Passenger Terminal continued in 2018-19 with the removal of the existing Connection Reliant (CR) Gangways in preparation for the installation of two new Sea Passenger Boarding Bridges (SPBB) scheduled for September 2019. The larger SPBB structures represent a more advanced passenger movement technology and will allow for the more efficient transfer of passengers to and from the terminal, improving the visitor experience.

The welfare of cruise ship crews has also been a consideration this year with the erection of a *Mission to Seafarers* marquee on the southern forecourt of the Overseas Passenger Terminal from October 2018. The marquee offered additional support to crews visiting the Harbour City, providing the opportunity to share experiences, seek support

services, call home or simply relax. A high rate of attendance indicates that this new initiative to bring services to the ships was a success.

The growth of New South Wales' regional ports as cruise destinations continues with both Eden and Newcastle seeing an increase in cruise bookings in 2018-2019.

This growth is set to continue with the completion of new cruise infrastructure in Eden and work being undertaken to identify other regional NSW ports with the potential to become new cruise destinations.

Two emerging destinations received visits during the 2018-19 season. Trial Bay (South West Rocks) hosted the *Caledonian Sky* in October 2018, while Batemans Bay welcomed the *Caledonian Sky* in October 2018 and *Seabourn Encore* and *Seabourn Sojourn* in December. Return visits by the *Caledonian Sky* and *Seabourn Encore* are scheduled for 2019-20 and development work is under way to expand shore-based offerings at both these destinations.

Cruise Shipping Overview

Newcastle enjoyed one of its biggest cruise seasons yet in 2018-19, with 16 cruise ships and almost 30,000 passengers visiting the port, an increase of a third over 2017-18. The season boasted seven maiden voyages, with visits from *Caledonian Sky*, *Viking Orion*, *Black Watch*, *Le Lapérouse*, *MV Arcadia*, *MS Noordam* and *Explorer of the Sea*, the second largest ship cruising the Australian and Pacific coast and the largest passenger cruise ship to visit Newcastle. Her visit highlights the Port's capability in handling the largest Voyager class cruise vessels in operation and its potential to accommodate further growth in coming years.

Forward bookings for 2019-20 remain strong with 15 ships scheduled to visit at time of writing. Three ships, the *Explorer Dream*, *Sea Princess* and *Golden Princess*, will have maiden voyages to Newcastle in the coming year.

Eden, on New South Wales' south coast, also enjoyed a strong 2018-19 season with 15 cruise ship visits that saw nearly 20,000 passengers disembark and participate in on-shore activities. *Caledonian Sky*, *Silver Muse*, *MS Amadea* and *Seabourn Encore* all made maiden voyages to the port during the season and this trend will continue in 2019-2020 when 22 ship visits are scheduled including maiden voyages from four ships – *Pacific Aria*, *Explorer Dream*, *Seven Seas Navigator* and *Celebrity Solstice*, the biggest cruise ship to ever visit Eden with nearly 3,000 passengers.

The 2018-19 season saw the last use of tenders at the port with the Eden Breakwater Wharf Extension due for completion shortly after the end of the 2018-19 season. The wharf extension is due to be officially opened on 4 August 2019 in time for the 2019-20 season. The new wharf will provide berthing capacity for ships up to 325m in length and offer land access for passengers without the need for a tender. Cruise passengers will now enjoy a streamlined

disembarkation process, increasing the numbers taking advantage of Eden's many sights and experiences.

In its third year as a cruise port, Wollongong welcomed a return visit from *Explorer of the Seas*. The ship, the largest cruise ship to visit Wollongong, brought more than 3,200 passengers to the city who were welcomed at the Illawarra Performing Arts Centre by Wollongong's friendly team of Ambassadors, a Welcome to Country, makers market and entertainment during the day before exploring the city and its sights.

Wollongong has been increasing its profile as a cruise destination in recent years with visits by the *Radiance of the Seas* and the *Norwegian Star* and this is set to continue in future years.

NORTHERN TERRITORY

Australia's Northern Territory has welcomed almost 50,000 passengers plus crew on 73 cruise ship visits in the financial year 2018/19. Darwin's geographic location and close proximity to Asia make it a popular cruise ship port for large cruise ships as well as small luxury vessels.

Unlike other destinations around Australia, only in Darwin and Sydney can cruise ships berth in such close proximity to the city centre.

Highlights of Darwin's cruise season include the inaugural visit of the *AIDAvita* in December 2018, the *Explorer of the Seas* made her maiden call to Darwin with over 3200 passengers in April 2019, and the luxury expedition vessel *Coral Adventurer* arrived in Darwin on her maiden voyage in May 2019.

The Department of Tourism, Sport and Culture works closely with the City of Darwin and stakeholders to ensure that on ground activities are enhanced when



cruise vessels are in port. The Regional Tourism Association, Tourism Top End, coordinates volunteers to greet and support visitors at the Cruise Ship Terminal and in the city.

Territory tour operators continue to provide a wide range of popular shore excursion options for cruise visitors to the region: Scenic flights to the World Heritage Kakadu National Park, half day tours to encounter the Top Ends unique wildlife at the Territory Wildlife Park, day tours to explore the amazing waterfalls of Litchfield National Park and the ever-popular jumping crocodile cruises continue to be favourites with passengers.

Closer to the port, visitors continue to discover the Northern Territory's rich Indigenous culture and stories of Cyclone Tracy at the Museum and Art Gallery of the NT, and explore Darwin's role in WWII history through the Bombing of Darwin Experience at the Royal Flying Doctor Service Tourist Facility and other key military attractions.



The construction of a new \$200 million luxury Westin hotel has commenced in February 2019. The location of the Westin Darwin Hotel overlooking Darwin Harbour and adjoining the city centre will provide a significant boost for the local tourism industry, and act as a major drawcard for high-end business people and travellers.

Work has also begun on a new Visitor and Events Centre at the popular George Brown Darwin Botanic Gardens. The new facility is part of the Territory Government's Turbocharging Tourism Stimulus Package and will bring new life into the Gardens, which are a popular stop for many cruise ship passengers.

A new major marketing campaign, the Territory Arts Trail, has been released to promote the Northern Territory as the premier destination to visit for Aboriginal art and cultural experiences and a new light exhibition by world-renowned artist, Bruce Munro, will run from November 2019 – April 2020 titled *Bruce Munro: Tropical Light*.



Australia's Northern Territory is a destination that appeals to many visitors, especially international guests visiting Australia for the first time. Central Australia, home to iconic Uluru (Ayers Rock), Kings Canyon and Alice Springs, proves a popular pre or post cruise destination, and is easily accessible from major ports around Australia. Remote luxury wilderness lodges have also grown in popularity and provide a perfect pre or post cruise holiday where guests can enjoy land-based activities, Indigenous culture and unforgettable experiences.

QUEENSLAND

Made up of 600 kilometres of coastal shoreline and 13 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 770,000 cruise passengers visited Queensland destinations in 2018-19, injecting a significant economic benefit. Queensland welcomed over 520 cruise ship days across the state

Cruise Shipping Overview



in 2018-19. Overnight calls continued to grow for Trinity Wharf in Cairns, Townsville recorded exceptional growth and is preparing for commencement of construction of a unique Great Barrier Reef experience call the Museum of Underwater Art and the Whitsundays, famous for their warm welcome from their volunteer greeters, provided exceptional visitor experiences that cement their place in international itineraries. Queensland's destinations are always striving to improve and refresh, offering new experiences along the coast to entice repeat visitation from passengers.

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 market, several infrastructure projects are currently underway. The \$158m Brisbane International Cruise Terminal project, is currently under construction and will be operational in late 2020. The Port of Brisbane project will cater to cruise ships including those greater than 270m

in length. Tropical North Queensland is also undergoing change, with plans for Ports North's \$124m 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, 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 with Adelaide fast growing in popularity as a successful Australian home port. Passenger and crew numbers continue to grow year on year and new destinations are being sought added to cruise line itineraries. The state hosted another record-breaking cruise ship season from October 2018 through to March 2019, with a total of 82 cruise ship visits to Adelaide and the regional ports of Kangaroo Island and Port Lincoln. The season featured a visit from the *Ovation of the Seas* and two visits from *Celebrity Solstice*, both with the capacity to hold over 4,000 passengers and crew. There were five overnight visits, including four in Adelaide & one in Port Lincoln.

The season hosted the *Azamara Quest* and *Viking Sun* maiden visits to Adelaide and Kangaroo Island, and the *Crystal Serenity* and *Silver Muse's* maiden visits to Kangaroo Island. Next season, seven cruise ships will make their maiden visits to South Australian ports.

Domestic itineraries are growing, with P&O Cruises' *Pacific Eden* offering twelve itineraries from Adelaide this season, three of which were return Adelaide itineraries that visited all three ports. Cruise and Maritime Voyages (CMV) also continued to homeport in Adelaide, with the *Astor* cruise ship offering six itineraries from Adelaide. CMV were the first cruise line to open an Australian head office in Adelaide in 2017.

Kangaroo Island continues to prove a popular choice for both domestic and international cruise itineraries, reaching an all new record of 26 visits this season.

Port Lincoln – the Seafood Capital of Australia, hosted 13 cruise ship visits this season, including one overnight visit.

Last year it was announced that in the 2019-20 season South Australia will welcome CMV's newest ship, the *Vasco da Gama*, to their newest regional port; Wallaroo. The port of Wallaroo is located on the Yorke Peninsula and can welcome small to medium sized cruise ships.

The South Australian Tourism Commission continues its focus on growing cruise ship visits, developing infrastructure and adding new products at all South Australian ports. Regional dispersal remains a high priority; developing the experiences on offer at regional ports through educating local communities and businesses about the benefits of leveraging the growing cruise industry. 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.



TASMANIA

Cruise visitation in Tasmania has increased significantly in the past five years as the state's appeal and demand for visitation continues to grow with domestic and international travellers. Between 2012 and 2015, the number of cruise ship port calls in Tasmania averaged around 60 visits per year. Since then, the state has experienced rapid growth with 106 port calls and approximately 275 950 cruise visitor days recorded in 2018-19.

Hobart received 62 port calls over the season, while Burnie received 25 and Port Arthur 17. Inspection Head at Beauty Point hosted one call from *Seabourn Sojourn* and one vessel visited Coles Bay. Tasmania was very pleased to welcome Viking Cruises for the first time. Viking made six calls to Hobart over the season, with further calls booked in 2019-20.

Queen Elizabeth also made her maiden call to Tasmania, stopping at both Hobart and Port Arthur. The *pacific Explorer* returned to Hobart in June 2019 for a Dark Mofo Event Cruise, bringing 2000 excited passengers to Tasmania's premier winter event.

The Tassie Cruise Exchange was held 24 – 27 July. The event is a partnership between Tourism Tasmania, Cradle Coast Authority, Tourism Northern Tasmania, Destination Southern Tasmania, Tasports, Circular Head Tourism Association, Port Arthur Historic Site and a range of highly engaged industry operators. Eight shore tour program managers from around Australia were invited to participate in a week long program of famils and business to business sessions with Tasmanian tourism experience operators.

During 2018, the Tasmanian Government undertook a destination review of each Tasmanian cruise port and anchorage. The assessment considered marine facilities and infrastructure, destination offer and industry capability including supply and dispersal of shore excursion activity; community sentiment and support; issues and opportunities specific to place and overall suitability and potential relative to port capability as well as yield potential and destination appeal.

The review is informing 2019-2021 cruise strategies for Tasmania. For example the review found that Beauty Point is an

Cruise Shipping Overview



VICTORIA

The 2018/19 cruise season to Victoria was slightly down on the 2017-18 season, with a total of 118 ships visiting Melbourne and Regional Victorian ports, three less than the previous season. This slightly lower figure is against the long-term trend of continued annual growth in cruise ship arrivals into Victoria. A total of 236,000 passengers and 103,000 crew visited Victorian ports for the season. For the forthcoming 2019/20 season arrivals will return to trend with 130 ships scheduled to call.

Melbourne received a total of 108 calls in 2018/19, with 50 turnaround visits, the same number of turnarounds as 2017/18. Carnival brands including the *Golden Princess*, *Pacific Jewel*, *Queen Elizabeth* (first season of turnarounds) and *Carnival Legend* dominated the turnarounds in Melbourne. *Radiance of the Seas*, a Royal Caribbean Cruise Line ship undertook a successful inaugural turnaround in February 2019.

A total of 10 ships called at regional ports, including five to Phillip Island, three to Geelong and two to Portland. Phillip Island is becoming more popular with a several cruise lines now visiting or exploring the feasibility of calling at the island.

ideal destination to develop for cruise visitation, while Wineglass Bay was found to be unsuitable. Tourism Tasmania has subsequently held successful discussions with all cruise lines operating in Tasmania in regards to a voluntary policy to exclude vessels with capacity for over 100 passengers from entering the bay.

Other destinations continue to be assessed for suitability for visit by expedition and small cruise ships.

TasPorts publicly released its Port Master Plan during August 2018. This plan will provide a guide to infrastructure investment and development over the next fifteen years and focus on the future growth and needs of the cargo, freight, Antarctic and cruise sectors.

With the \$58 million Penguin Parade Visitor Experience Centre scheduled to open in July 2019, the island is likely to increase in popularity as a port call.

Destination Phillip Island has undertaken a great deal of industry development over the past year to ensure the delivery of high quality visitor experiences to cruise ship passengers. Significant improvements to the arrival experience at Rhyll, along with industry education and product development have significantly improved the experiences on offer for incoming passengers.



WESTERN AUSTRALIA

Western Australia is one of the world's largest states, with an incredibly diverse coastline stretching over 20,000km. Perth and the port city of Fremantle are undergoing massive transformations; Perth has seen redevelopments on a huge scale the development of the magnificent Elizabeth Quay waterfront precinct and Perth City Link, which connects Northbridge with the CBD. While Fremantle is undergoing a major redevelopment, with more than one billion dollars in the investment pipeline.

Fremantle Port, Australia's largest cruise ship terminal recently unveiled a \$3.25 million refurbishment. With the aim of improving the cruise passengers' comfort and visual experience, Fremantle Passenger Terminal welcomed a new ground floor foyer, decorative glass panelling, modern furniture, repainted façade, updated signage and banners. Fremantle was included in Lonely Planet's 2016 *Best in Travel* guide for good reason. There is more than \$1 billion dollars of redevelopment in the planning pipeline as well as new venues such as Seashells and the Sweetwater rooftop bar in the Richmond Quarter and COAST at Port Beach. Segway and self-guided walking tours are yet another attraction, along with a range of cruises and a thriving craft beer scene.

Highlights of WA's 2018/19 season included Geraldton welcoming a first overnight visit by *Azamara Quest* in December 2018, with a memorable welcome event that showcased the region. *Silver Muse* made its maiden voyage to WA in March 2019 as part of a 74 day 'Grand Voyage' with 596 guests aboard, also overnighing in Fremantle and making calls to Albany and Geraldton. Other maiden calls included *MSC Magnifica* in March 2019 as part of a 119-day world cruise and the luxurious *Viking Sun* that overnighed in Fremantle on 27/28 March 2019 en-route to Durban, South Africa from Sydney on a 29-day voyage. All guests aboard *Silver Muse* and *Viking Sun* received a special commemorative medallion upon their arrival into Fremantle, commissioned by Tourism WA and produced by the Perth Mint, to mark the ships' maiden visits to WA.

The Port of Broome is set to receive a major 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 2019. Cruise Broome, Kimberley Port Authority and Tourism WA were delighted to host the 21st annual Australian Cruise Association Conference in Broome, Port of Pearls in

September 2018. The Conference was heralded a great success and provided an opportunity for delegates to experience many of Broome's unique attractions such as a camel ride on Cable beach.

Kuri Bay in the Kimberley region, is a non-proclaimed port owned by the Paspaley Group and has successfully welcomed cruise ships including Maasdam, Seabourn and Princess Cruises in 2018/19. Kuri Bay was the first and largest cultured South Sea pearl farm in the world and the history of this unique destination is a fascinating insight into multiculturalism in Australia.

Busselton in the Margaret River Region has set the benchmark as Western Australia's new cruise destination, with *Queen Mary 2* visiting the South West port of Busselton for the second time and *Queen Elizabeth* making a maiden call in 2019.

Guests aboard cruise ships visiting Busselton are able to take part in shore excursions into the Margaret River Region.

Looking to the future, Princess Cruises has announced that it will homeport the *Sun Princess* superliner in Fremantle for a record 141 days in 2019-20 when it arrives on November 1, 2019.

Cruise Shipping Overview

The *Sun Princess*, which carries 2,000 guests, will also visit Albany, Busselton, Geraldton and Broome. This is expected to inject \$32 million into the State's economy and generate a 100 percent increase in cruise ship guests sailing from WA, compared to the 2018-19 season. Fremantle will welcome Cruise & Maritime Voyages' newest addition to its fleet, *Vasco Da Gama*, scheduled to call Fremantle home in the 2019-20 season. Options are being investigated to make the Exmouth Gulf a more reliable anchor and tender destination. 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.

PAPUA NEW GUINEA

PNG as a cruise destination continues to receive cruise ships into its main cruise destinations of Alotau, Kitava, Kiriwina, Conflict Island, Milne Bay, Rabaul, East New Britain, Madang, Wewak, East Sepik and the smaller islands by the expeditionary cruises. Rabaul, East New Britain in particular is has been receiving a high number of cruise calls.

A total of approximately eighty-six cruise port calls were made into Papua New Guinea from beginning of 2018 to March 2019. By the end of 2019 the figures will have increased as more cruise port calls will be made.

PNG Tourism Promotion Authority (PNGTPA) attended the Seatrade Cruise Global in Fort Lauderdale in 2018 and again in Miami this year as part of the Australia Cruise Association. To see further development changes in this industry, the Authority is in the stages of reviewing the National Cruise Ship Development Strategy to reassess the current state of cruise in Papua New Guinea. Additionally, Destination development plans will also cover newly scoped destinations of Samarai, Esa'ala, Duke of York and Autonomous Region of Bougainville.



More focus will go into building shore excursion activities with smaller tour operators handing ground tours in East New Britain, Milne Bay and East Sepik.

PNG still faces its challenges in the cruise industry year in and out as tourism is very much at its development stages. PNGTPA envisions more community awareness activities for cruise destinations.

NEW CALEDONIA

New Caledonia experienced an increase of more than 14% in the past year, with 500 port calls bringing 509,463 visitors. This reflects a growth of six times that of 2005.

With the global change in ship sizes, New Caledonia has experienced challenges along with many destinations in the region. Ships are required, more often, to dock in the Greater Harbour because they cannot be berthed in the Small Harbour.

In addition, there are also constraints on the respect of "traditional custom decisions" made by the local chiefs with the number of visitors limited to 100 for the Isle of Pines, and no arrivals on a Sunday. This decision, implemented since 2017, has increased the pressure on Nouméa, being the first port of call for ships arriving from Australia.

In 2018 the phenomenon was further accentuated with double bookings and calendar incidents which implied more congestion in Nouméa and on the islands which can only receive one ship at a time.

The referendum on the independence of New Caledonia may have had some impact on the cruise ship arrivals late last year. Hopefully with some more stability, the industry will see some stable growth in the coming year. Carnival Australia is also sending two larger ships to the region in 2019 which will have a positive effect.



Management Committee 2018-19

From left: Jay McKenzie (Bob Wood Cruise Group), Anne McVilly (PAHSA), Martin Bidgood – Deputy Chairman (Intercruises Shoreside & Port Services), Jill Abel (ACA CEO), Christine Cole (Tourism WA), Thor Elliott – Treasurer (Fremantle Ports), Grant Gilfillan – Chairman (PANSW).
Absent: Scott Lovett (Tourism NT).



Grant Gilfillan Chairman | Port Authority of NSW

Term Expires 2020

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.

Martin Bidgood Deputy Chair | Intercruises Shoreside and Port Services

Term expires 2021

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.

Christine Cole Member | Tourism WA

Term Expires 2021

Christine has worked for Tourism WA for almost 19 years in a number of diverse roles. In her current role as Projects Manager, Destination Development, Christine's main focus is to encourage more cruise lines to visit Western Australia's port destinations. This includes working with industry and government at all levels, to overcome infrastructure impediments and improve access to ports for cruise ships.

Capacity building is an important element of the cruise shipping strategy for WA, and Christine has been instrumental in the development and delivery of a range of education programs; from 'Cruise Ready Workshops' to rolling out the first accredited training program for cruise guides.

As the Secretariat of the Cruise WA Committee for the past seven years Christine has guided the implementation of WA's cruise shipping strategy.

Christine's work history has given her extensive insight into the tourism industry, having worked as an advisor for Tourism Ministers and as Director of Marketing for Bali Hai Cruises for eight years, based in Bali.

Christine holds a Post-Graduate Diploma in Tourism Management from Curtin University.

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.

Anne McVilly Member | Port Arthur Historic Sites

Term expires 2020

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.

Scott Lovett Member | Tourism NT

Term expires 2021

Scott Lovett is the Executive General Manager – Industry Development for Tourism NT. Working as part of the Department of Tourism and Culture, he leads a multi-disciplinary team heading investment attraction, aviation, destination planning, research and enterprise development across the NT. A passionate advocate for regional development, Scott has also held senior roles within the Department of the Chief Minister and Department of Trade, Business and Innovation.

Prior to joining the public sector Scott held senior roles in Convention Centres, Stadia, Event Production Houses and Hotels across Australia. He is a current board member of the NT Major Events Company, the statutory company responsible for delivering some of the NT's best known and loved events. He is also a past board member at Desert Knowledge Australia, the Australian Association of Convention Bureaux and Meetings Events Australia.

Scott was raised in regional Queensland and Adelaide from where he holds formal qualifications in Tourism and Hospitality from the globally renowned Regency Hotel School.

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 2019 to June 2022

Management Committee 2018-19

Management Committee Meetings

The Management Committee held the following meetings:

138		20 July 2018	Melbourne
139	AGM	14 September 2018	Broome
140		18 October 2018	Teleconference
141		6 December 2018	Sydney
142		14 February 2019	Teleconference
143		16 May 2019	Hobart

Attendance at Management Committee Meetings

Record of attendance at scheduled Management Committee meetings:

Member	Meetings Attended	Meetings Eligible to Attend
Grant Gilfillan	6	6
Martin Bidgood	5	6
Thor Elliott	6	6
Christine Cole	6	6
Jay McKenzie	4	6
Scott Lovett	5	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 2018-19 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

Chairman Grant Gilfillan and Deputy Chairman Martin Bidgood

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

Sub Committee 2

Deputy Chairman Martin Bidgood, 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

Jay McKenzie and Christine Cole

- Membership and education
- Industry forums

Sub Committee 5

Scott Lovett and Jill Collins

- Communications strategy
- Implementation of public relations plan

Sub Committee 6

Anne McVilly, Chris White, Mark Day and Brendan Sanders

- Annual Conference and AGM

Sub Committee 7

Jay McKenzie and Scott Lovett

- Annual Report

Sub Committee 8

Christine Cole

- State Tourism Organisation co-ordination

Sub Committee 9

Thor Elliott, John McKenna

- State Ports Organisations co-ordination

<p>Vision</p> <p>Develop and grow Australia's position as a major world class base and appealing destination for cruise ships.</p> <p>Mission</p> <p>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.</p> <p>Objective</p> <p>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.</p>	<p>Focus 1</p> <p>Leadership and Governance</p>	<p>Focus 2</p> <p>Research and Insights</p>	
	<p>Objectives</p>	<p>Establish strategies to continue the recognition of ACA as a respected peak organisation connecting and representing the broader cruise industry</p>	<p>Provide ACA members with useful, accurate and meaningful research into the cruise sector</p>
	<p>Priority Projects 2018-19</p>	<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 • Finalise 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 (Miami 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 • STO members to push TRA to collect arrival data for both land-based and cruise travellers
	<p>Other Important Projects</p>	<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
	<p>Key Performance Indicators (KPI's)</p>	<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 2018 cruise conference in Broome, WA
<p>Key Achievements 2018-19</p>	<ul style="list-style-type: none"> • 2018-19 Budget completed • Secured new 4-year contract with CEO • 2018-19 Annual Report completed 	<ul style="list-style-type: none"> • Broome conference delivered including extensive Famil program for international speakers • EIS report delivered in partnership with CLIA • Planning underway for 2019 Conference in Geelong 	

Focus 3	Focus 4	Focus 5
Position and Market the ACA region as a world class destination	Membership	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 Miami Convention Investigate ACA presence at Cruise Shipping Asia Implementation actions of communications strategy 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 Abide by CLIA MOU and seek future partnership opportunities Sea Passenger Facilitation – national version of cruise ship calls schedule Continue to work with Global Cruise Association
<ul style="list-style-type: none"> Produce renewed promotional collateral Arrange famils to Australia Expand media list of contacts Assist members with cruise line appointments Review website 	<ul style="list-style-type: none"> Review communication platforms for members Rotate management meetings in different locations (Educational component) Brief executives including member organisations 	<ul style="list-style-type: none"> Engage with stakeholders' decision makers, Tourism Ministers, Shadow Ministers, Hon. Members Consolidate TA/DRET relationship Develop Cruise Sustainability Guide with CLIA and NZCA
<ul style="list-style-type: none"> Attend Seatrade Global in Miami 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 engagement 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
<ul style="list-style-type: none"> Cruise forum and famil program Tasmania Attendance at Seatrade Global Miami Hosted Down Under BBQ Aussie Day/staff training day RCL in Miami 	<ul style="list-style-type: none"> CEO & Chair meeting with Visit Victoria Monthly members' update circulated Monthly articles in Cruising mag Social media coverage Management Committee meetings in Sydney, Melbourne, Broome and Hobart ACA Networking functions in Sydney, Melbourne, Broome and Hobart 	<ul style="list-style-type: none"> Created a Cruise Sustainability Guide and distributed to broad range of stakeholders Attendance at National Sea Passenger Facilitation Committee meetings Provided input into the Beyond 2020 Tourism Report Responded to the Tasmanian Cruise Strategy CEO attendance at Tourist Tracking Symposium in Hobart CEO Guest Speaker at Tasmanian Tourism Industry Conference Guest speaker at the Australian Indigenous Tourism Conference in Lorne Guest speaker at Ports Australia Business Conference in Townsville

Project Reports

Australian Cruise Association Conference

The 2018 Conference was held in Broome in September and was sponsored by Tourism Western Australia, Cruise Broome and Kimberley Ports Authority. The conference, themed "Forging Stronger Relationships", attracted 115 delegates from Australia, Papua New Guinea, Japan, Norfolk Island and the USA.

Keynote presentations:

- Sture Myrmell – President P&O Cruises Australia & President Carnival Australia
- Susan Bonner – VP and Managing Director, Royal Caribbean Cruises, Aust and NZ
- Timothy Littlely – Director Deployment & Itinerary Planning, Seabourn Cruise Line
- Mike Drake – Director, Marine Operations – DPA, P&O Cruises Australia
- Mike Gallacher – CEO, Ports Australia

Other speakers included:

- Dean Brazier - CMV
- Michael Mihajlov – Carnival Australia
- Anne McVilly – Port Arthur Historic Site
- Tammy Marshall – the BHive.

Seatrade Cruise Global and Sales Calls

Seatrade Cruise Global returned to South Beach, Miami from 8-11 April 2019 to a newly refurbished Convention Centre. The event is ACA's key international business to business event. The exhaustive meeting schedule was once again jam packed with the team ensuring that all events were covered, as well as making the most of our time with the cruise line executives throughout the four day event. ACA Chairman Grant Gilfillan was invited to participate on a panel at the conference titled "Asia Pacific". We also had our first meeting with the incoming CEO of CLIA Global, Kelly Craighead who is very open to working with our association.

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
- Martin Bidgood – Intercruises
- Hans Van Pelt – Tourism Tasmania
- Christine Cole – Tourism WA
- Leah Clarke – South Australia Tourism Commission
- Natalie Godward – Cruise Eden/ Destination NSW
- Capt. Trond Kildal – Ports North

- Shayne Murray – Cruise Broome
- Thibaut Raffard – New Caledonia Tourism
- Daphne Galore – PNG
- Karlie Cavanagh – Inchcape Shipping Services
- Toby Biddick – Abercrombie & Kent
- Clinton Lennon – Brisbane Cruise Wharf
- Jeff Bazlemans – Victorian Ports Corporation
- Capt. Wel Gamble – Australian Ree Pilots.

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
- Hurtigruten
- Sea Dream.

Economic Impact Study

Cruise Lines International Association Australia (CLIA) and the Australian Cruise Association (ACA) jointly released a report on the analysis of the Australian Cruise Industry, the Contribution of Cruise Tourism to the Australian Economy in FY2017/18.

The continued, unified approach to reporting enabled further improvements to be made to the methodology and data collection for the report. The report disaggregates the results down to the port and destination level to meet the needs of members and key stakeholders of both associations.

The 2017-18 Economic Impact Study reports:

- Total output of \$4.8 billion, including direct expenditure of \$2.3 billion.
- Total wages income of \$1.4 billion, including \$772 million in direct income and \$623 million in indirect and induced wages income.
- Total employment impacts of 17,369 full time equivalent positions (FTEs), including 8,962 direct positions and 8,407 indirect and induced positions.
- Total value added impact of \$2.6 billion, including a direct impact of \$1.2 billion.

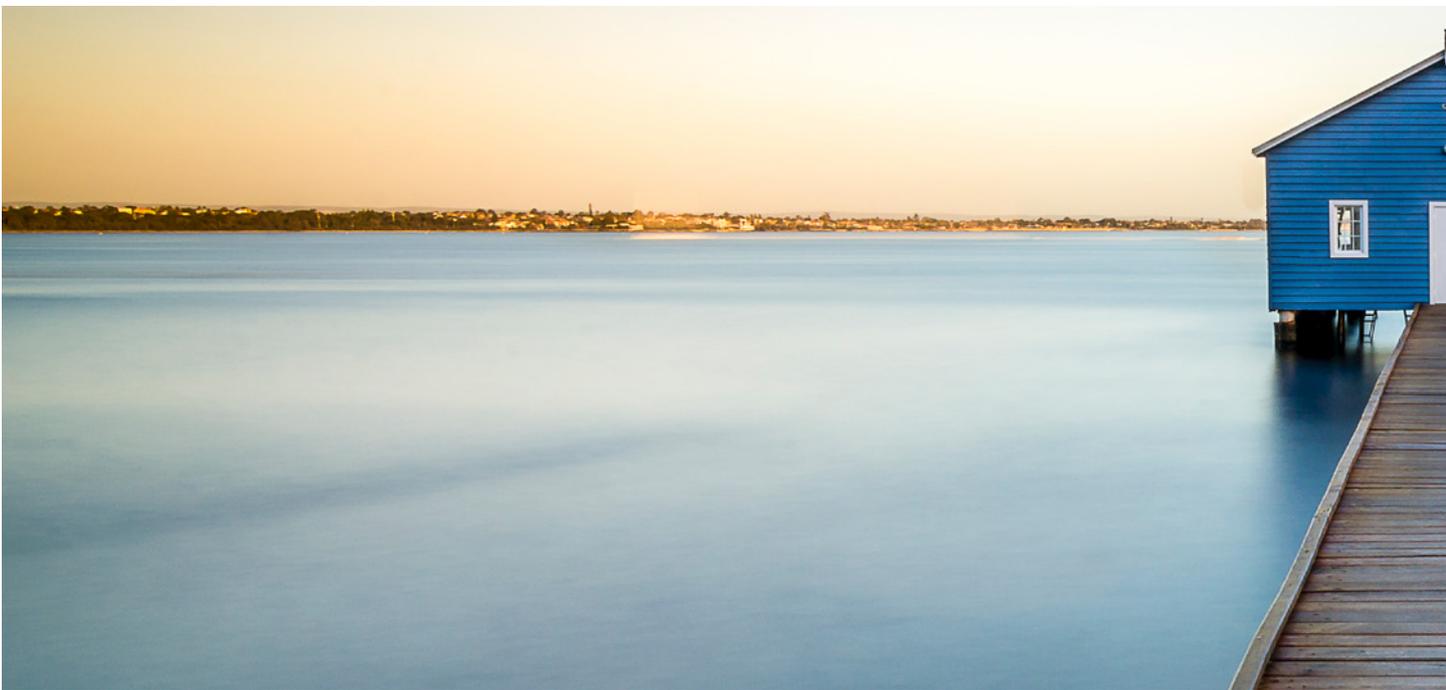


Table E.1 Australian Cruise TOURISM Statistics

Statistic	2016-17	2017-18	Change	% Change
Australian ports/destinations visited	42	41	-1	-2.4%
Visiting Cruise Ship Characteristics				
Number	50	49	-1	-2.0%
Passenger capacity	79,022	78,056	-966	-1.2%
Crew Capacity	33,445	33,290	-155	-0.5%
Cruise Ship Visits				
Home Port	534	607	73	13.7%
Transit Port	663	629	-34	-5.1%
Total	1,197	1,236	39	3.3%
Cruise Ship Visit Days				
Home Port	550	625	75	13.6%
Transit Port	738	692	-46	-6.2%
Total	1,288	1,317	29	2.3%
Passengers & Crew Visit Days All Ships				
Home Passengers	1,926,276	2,173,975	247,699	12.9%
Transit Passengers	988,797	944,297	-44,500	-4.5%
<i>Total Passenger Visit Days</i>	<i>2,915,073</i>	<i>3,138,272</i>	<i>203,199</i>	<i>7.0%</i>
Crew	352,257	367,211	14,954	4.2%
Total	3,267,330	3,485,483	231,665	6.7%
Direct Expenditure (\$M) All Ships				
Home Passengers	\$1,058.0	\$1,020.3	-\$37.8	-3.6%
Transit Passengers	\$182.5	\$169.8	-\$12.6	-6.9%
Total Passenger Spend	\$1,240.5	\$1,190.1	-\$50.4	-4.1%
Crew	\$35.0	\$37.0	\$2.0	5.6%
Cruise Lines	\$939.0	\$1,034.9	\$96.0	10.2%
Total	\$2,214.5	\$2,262.0	\$47.5	2.1%

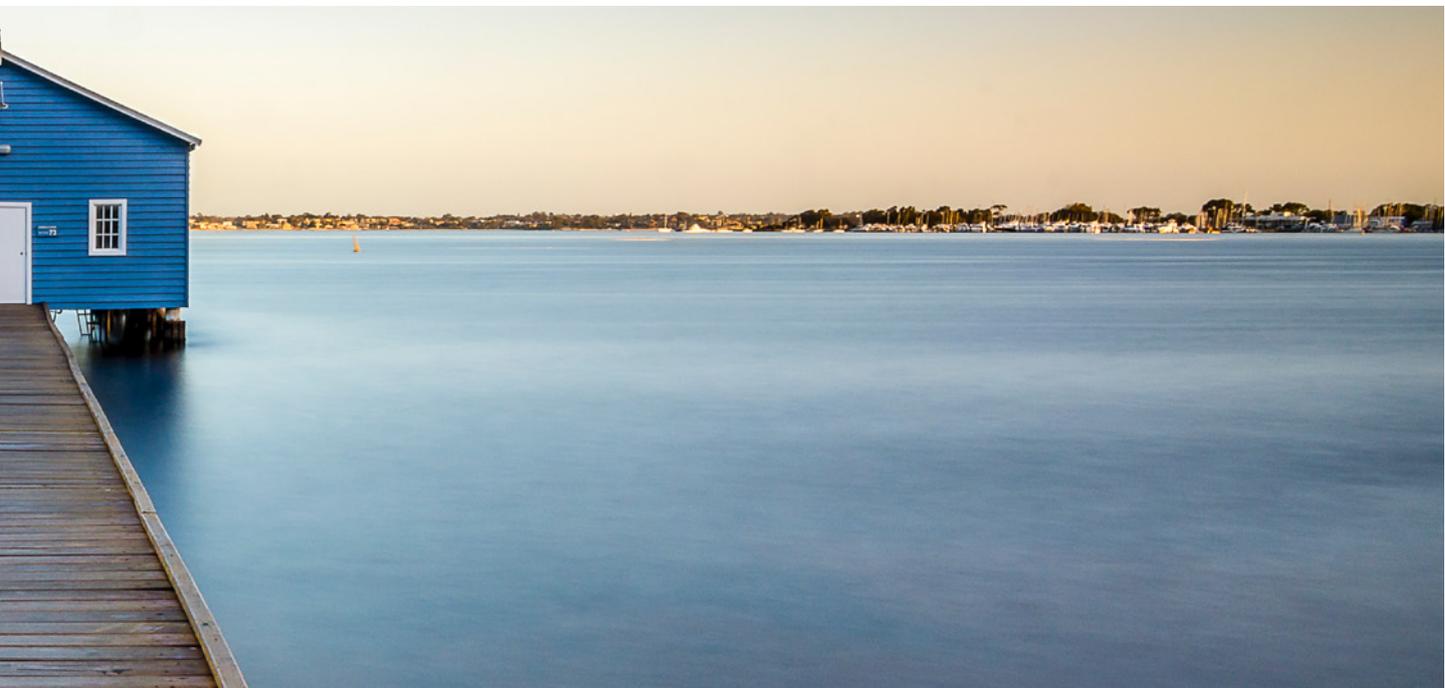


Table E.2: National Economic Impacts of the Cruise Industry in Australia, 2017-18

Impact	2016-17	2017-18	Change	% Change
Output (\$M)				
Direct	\$2,214.5	\$2,263.3	\$48.8	2.2%
Indirect and Induced	\$2,522.1	\$2,539.4	\$17.4	0.7%
Total	\$4,736.5	\$4,802.8	\$66.2	1.4%
Wages Income (\$M)				
Direct	\$780.5	\$772.6	-\$7.9	-1.0%
Indirect and Induced	\$619.3	\$623.6	\$4.3	0.7%
Total	\$1,399.8	\$1,396.1	-\$3.6	-0.3%
Employment (FTEs)				
Direct	9,271	8,969	-302	-3.3%
Indirect and Induced	8,515	8,412	-103	-1.2%
Total	17,786	17,381	-405	-2.3%
Value Added (\$M)				
Direct	\$1,172.0	\$1,175.9	\$3.9	0.3%
Indirect and Induced	\$1,393.4	\$1,403.0	\$9.6	0.7%
Total	\$2,565.4	\$2,578.9	\$13.5	0.5%

Source: 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.

Christine Cole from Tourism WA and Scott Lovett from Tourism NT joined the committee following the 2018 AGM in Broome.

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
2018	Broome	115	12-14 September
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 91 members as at 30 June 2019:

Name	Representative	Level	Member Since
AAT Kings	Lauren Walker	Bronze	2005
Abercrombie & Kent	Toby Biddick	Silver	2002
Admirals Group	Michael Hackman	Silver	2018
Australia Zoo	Erina Kilmore	Bronze	2017
Australian Pacific Touring	AngusTandy	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	Bryce Goodhugh	Bronze	2017
Bob Wood Cruise Group	Jay McKenzie	Silver	1998
BridgeClimb	Jessica Meire	Bronze	2013
Brisbane Cruise Wharf	Lee Butterworth	Platinum	2004
Burnie City Council	Anne Langham	Gold	1998
Burnt Pine Travel	Bart Murray	Silver	2018
Chart Management Consultants	Ted Blamey	Bronze	2011
Christmas Island Tourism Association	Philip Tubb	Bronze	2008
Chris White		Honorary	2017
City of Albany	Michael Cole	Silver	2019
City of Greater Geelong	Brett Ince	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	Tony Corbett	Gold	2001
Curringa Farm	Tim Parsons	Silver	2018
Darwin Port	Peter Dummett	Platinum	1995
Destination NSW	Stephen Mahoney	Platinum	1995
Destination Phillip Island	Kim Storey	Bronze	2019
Destination Southern Tasmania	Alex Heroys	Bronze	2018
Destination Wollongong	Mark Sleigh	Silver	2016
Evda Marangos		Honorary	2016
Flinders Ports	Carl Kavina	Platinum	2009
Fremantle Ports	Thor Elliott	Platinum	1995
Gladstone Area Promotion and Development	Dominique Gleixner	Bronze	2015
Gladstone Ports Corporation	Andrew Davis	Silver	2017
Glenelg Shire Council	Michael Cottee	Silver	2010
Glenn Stephens		Honorary	2014
Great Southern Rail/Journey Beyond	Gareth Coakley	Silver	2011
Hobart City Council	Emily Hopwood	Bronze	2009
Hobart International Airport	Matt Cocker	Bronze	2016
ID New Zealand	Deborah Summers	Silver	2014
Inchcape Shipping Services	David Pratt	Silver	2016

Members' Register (continued)

Name	Representative	Level	Member Since
Intercruises Shoreside and Port Services	Martin Bidgood	Silver	2011
Judy Wood		Honorary	2016
Kimberley Coastal Pilots	Capt. Craig Brent-White	Silver	2017
Kimberley Ports Authority	Luke Westlake	Platinum	2018
Kuranda Scenic Railway	Ivana Andacic-Tong	Bronze	2008
Mike Bartlett		Honorary	2007
Mid West Ports	Rochelle Macdonald	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	Lana Howell	Silver	2017
Papua New Guinea Tourism	Mary Kanawi	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	Matthew Carley	Platinum	2017
Port of Portland	Greg Tremewen	Silver	2007
Port of Townsville Ltd.	Nyree Bolton	Gold	2002
Ports Australia	Michael Gallacher	Honorary	2005
Ports North	Kerry Egerton	Platinum	1993
Quicksilver Group	Megan Bell	Bronze	2017
Richard Doyle		Honorary	2016
Royal Botanic Gardens	Lynnette Foo	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	Rosalind Pixley	Bronze	2015
Sydney Outback Tours	Paul Pickering	Bronze	2017
Svitzer Australasia	Dylan Sheehan	Platinum	2018
Tasports Burnie/Devonport/Launceston	Kristy Little	Gold	1993
Tasports Hobart	Kristy Little	Platinum	1993

Name	Representative	Level	Member Since
The Australian Opal and Diamond Collection	Joseph Dimasi	Bronze	2002
The BHive	Tammy Marshall	Bronze	2017
The CaPTA Group	Ben Woodward	Bronze	2005
Thompson Clarke	Chris Raley	Bronze	1994
Tourism and Events Queensland	Julie O'Brien	Platinum	1993
Tourism Australia	Leigh Sorensen	Platinum	2016
Tourism Northern Tasmania	Chris Griffin	Bronze	1998
Tourism NT	Scott Lovett	Platinum	1998
Tourism Tasmania	Hans Van Pelt	Platinum	1998
Tourism Western Australia	Christine Cole	Platinum	2017
Townsville Enterprise	Lisa Woolfe	Gold	2005
Trippas White Group	Jay Yip	Bronze	2019
Victorian Ports Corporation (Melbourne)	Rachel Johnson	Platinum	1998
Visit Victoria	Chris White	Platinum	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 2018-19:

- Admirals Group
- Burnt Pine Travel
- City of Albany
- Curringa Farm
- Destination Phillip Island
- Destination Southern Tasmania
- Kimberley Ports Authority
- Svitzer Australasia
- Trippas White Group.



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 2018-19.

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





Annual Financial Report

for the year ended 30 June 2019

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Compilation Report

Australian Cruise Association for the year ended 30 June 2019

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 2019.

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: 9 August 2019

Income Statement

Australian Cruise Association for the year ended 30 June 2019

	Notes	2019 \$	2018 \$
Income			
Conference Sponsorship		19,887	52,641
Grants Received		80,855	64,650
Interest Received		7,277	6,935
Prior Period Adjustment		2,158	-
Total Income		110,177	124,226
Other Income			
Conference		134,601	101,997
Membership Fees		269,919	240,200
Other Income		47,192	49,509
Total Other Income		451,712	391,706
Total Income		561,889	515,932
Expenses			
Accounting and Audit		6,500	6,445
Administration		79,519	63,804
Annual Reports		3,384	4,077
Bank Charges		956	1,098
Committee Travel		-	1,299
Conference Expenses		153,186	87,449
Depreciation		-	1,950
EMDG and EIS Consultancy		5,965	21,600
Events and Venue Hire		9,396	10,821
Insurance		2,618	2,504
Marketing		229,469	189,543
Other Expenses		10,003	5,176
Printing and Stationery		2,652	5,794
Subcontractors		39,361	48,498
Subscription		335	56
Telephone		2,581	3,300
Travelling Expenses		25,980	29,822
Total Expenses		571,905	483,238
(Deficit/Surplus) from ordinary activities		(10,016)	32,694

Statement of Financial Position

Australian Cruise Association as at 30 June 2019

	Notes	2019 \$	2018 \$
Assets			
Current Assets			
Cash and Cash Equivalents	2	517,500	568,083
Trade and Other Receivables	3	224,673	179,468
Total Current Assets		742,173	747,551
Total Assets		742,173	747,551
Liabilities			
Current Liabilities			
Trade and Other Payables	4	310,436	296,177
GST Payable	5	11,402	21,023
Total Current Liabilities		321,838	317,200
Total Liabilities		321,838	317,200
Net Assets		420,335	430,351
Equity			
Retained Surpluses		420,335	430,351
Total Equity		420,335	430,351

Notes to the Financial Statements

Australian Cruise Association for the year ended 30 June 2019

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 Australian Cruise Association 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

Australian Cruise Association for the year ended 30 June 2019

	Notes	2019 \$	2018 \$
2. Cash & Cash Equivalents			
Cash at bank and on hand		187,598	245,178
Bank short term assets - Deposits		329,902	322,905
Total Cash & Cash Equivalents		517,500	568,083
3. Trade and Other Receivables			
Trade Receivables		165,573	137,855
Other Debtors		2,158	-
Prepayments		56,943	41,613
Total Trade and Other Receivables		224,673	179,468
4. Trade and Other Payables			
Memberships in Advance		274,200	254,195
Trade Payables		-	11,982
Other Payables		191	30,000
Other Amounts Received in Advance		36,045	-
Total Trade and Other Payables		310,436	296,177
5. Current Tax Liabilities			
GST		11,402	21,023
Total Current Tax Liabilities		11,402	21,023
6. Property, Plant and Equipment			
Office equipment			
Office equipment at cost		1,950	1,950
Accumulated depreciation of office equipment		(1,950)	(1,950)
Total Office equipment		-	-
Total Property, Plant and Equipment		-	-

Depreciation Schedule

Australian Cruise Association for the year ended 30 June 2019

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

Statement by Members of the Committee

Australian Cruise Association for the year ended 30 June 2019

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 2019 and its performance for the year ended on that date.
2. At the date of this statement, there are reasonable grounds to believe that Cruise Down Under will be able to pay its debts as and when they fall due.

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



Chairman



Treasurer

Sign date: 14 August 2019

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 2019 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 2019 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.

Liability limited by a scheme approved under Professional Standards Legislation.



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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 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.

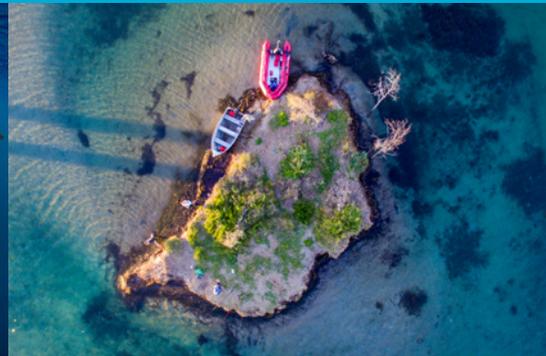
We communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.



NICK CARTER
PARTNER
WISE LORD & FERGUSON

Date: 14 August 2019

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



**AUSTRALIAN
CRUISE**
ASSOCIATION

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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