

Economic Impact of the Cruise Shipping Industry in Australia 2009-10

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Research commissioned by CDU & Tourism Australia

- Study background
- Cruise industry growth characteristics
- Economic impact model
- National, State & Territory economic impacts
- Outlook for 2010-11

Research conducted every year for six years

- Project supported by CDU & Tourism Australia plus Commonwealth Government (2004-05 to 2007-08)
- Cruise shipping
 - *“A vessel undertaking scheduled deep water cruises of two days or more with a passenger capacity of 100 or more”*
- Passenger & crew expenditure surveys



Adventure - Orion



Boutique – Silver Whisper



Mid Size – Pacific Sun

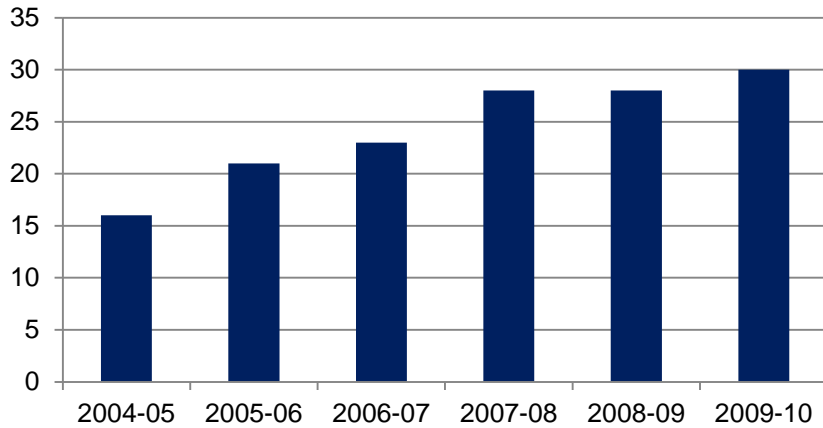


Mega – Star Princess

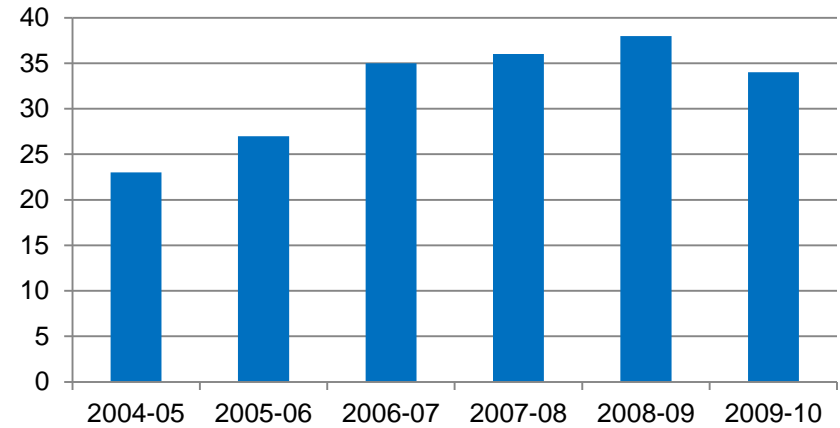


Cruise indicators show a positive trend

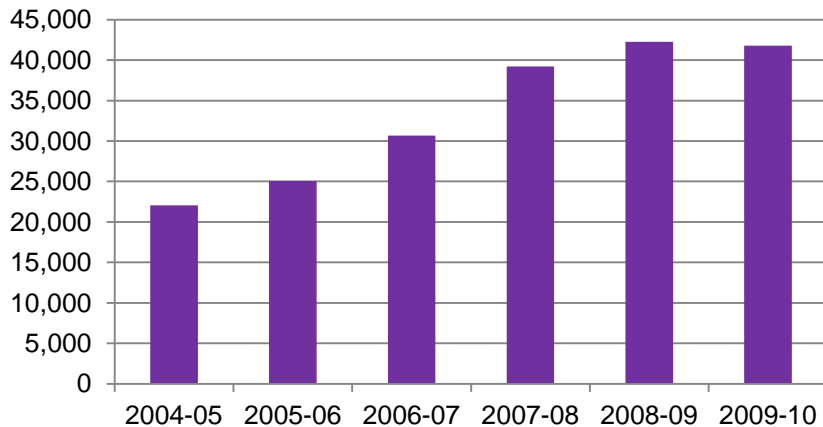
Australian Ports Visited



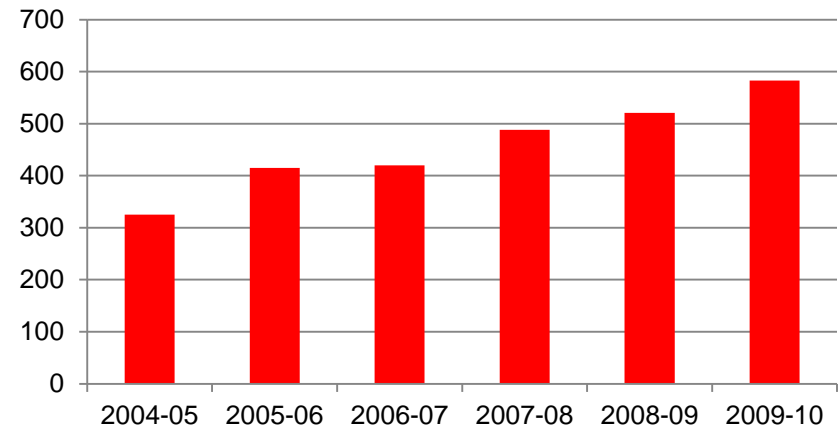
Visiting Cruise Ships



Passenger Capacity

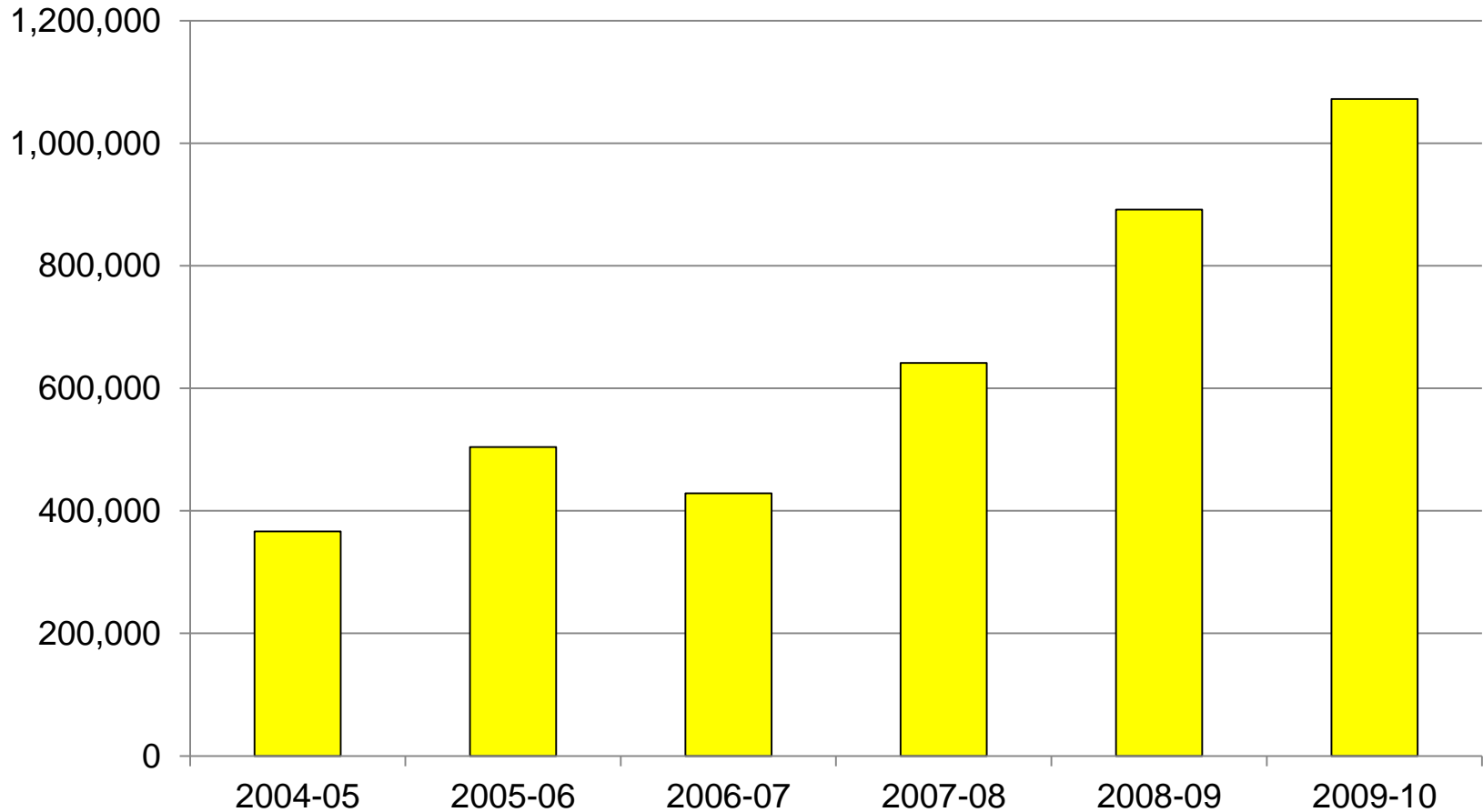


Cruise Ship Visits

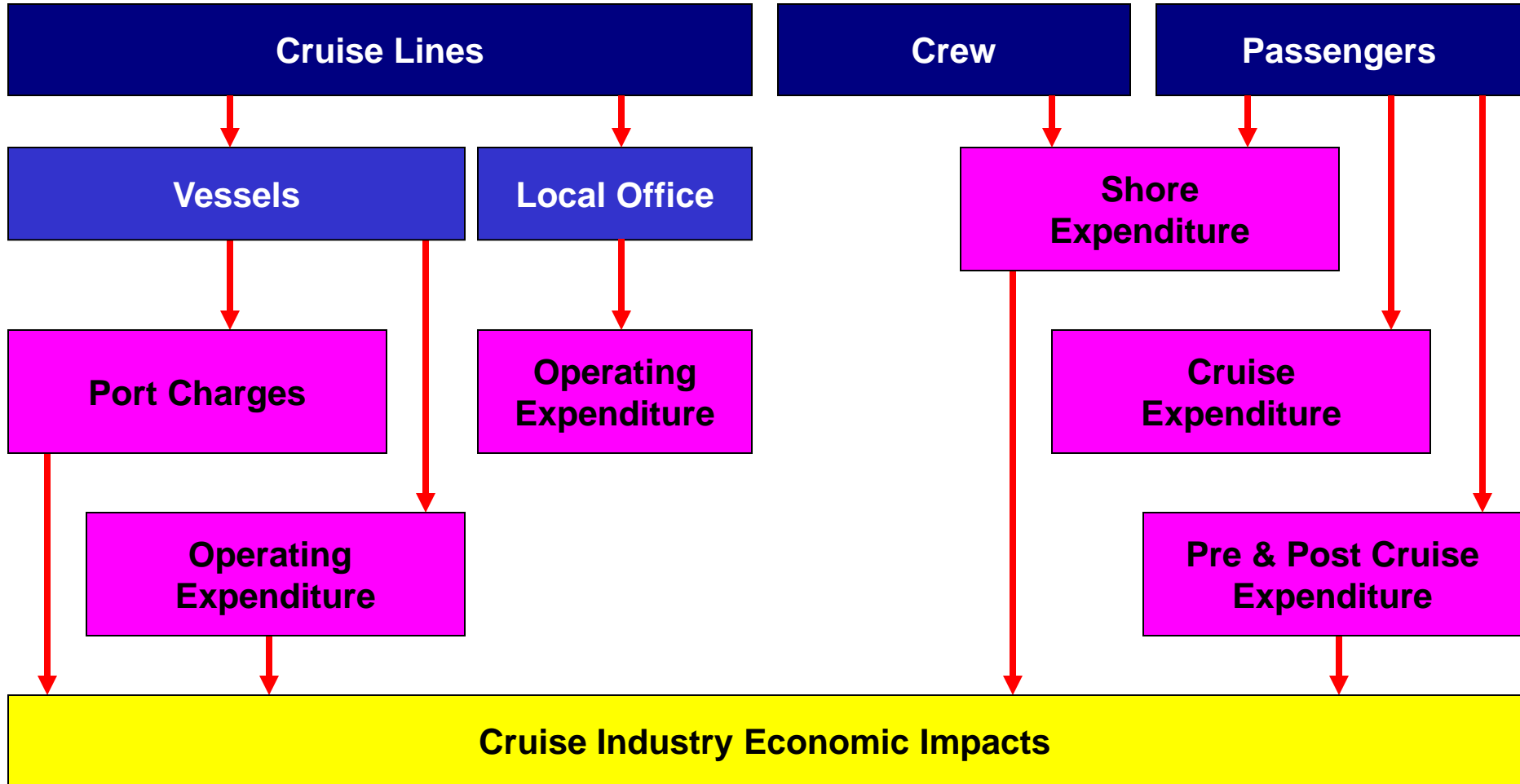


Passenger days in port = more spending

Passenger Days at Port



Cruise industry expenditure



Economic assumptions

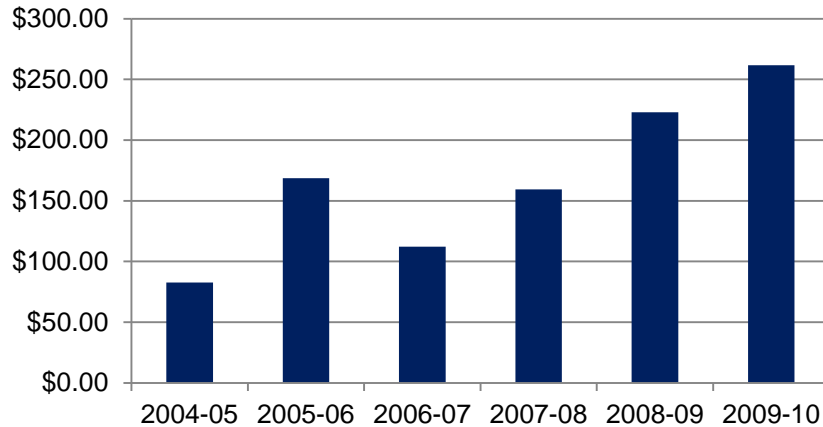
- **Included**
 - On shore passenger expenditure (survey)
 - On shore crew expenditure (survey)
 - Port charges and supplies (estimated)
- **Excluded**
 - Passenger cruise expenditure
 - Local cruise line office operating expenditure (non port activity)
 - Any port or vessel capital expenditure
- **Impacts**
 - National: International + port
 - National: International + domestic + port
 - State/Region: International + domestic + port

Data sources

- Passenger numbers
 - CDU from individual port authorities and state tourism bodies
- Passenger & crew surveys
 - Intercept surveys at port or departure point
 - On day prepaid & spent, pre embarking expenditure
 - 2006-07 (Brisbane, Sydney, Cairns, Tasmania, Melbourne)
 - 2008-09 (Tasmania)
 - 2009-10 (Tasmania, Darwin, Melbourne)
- Port charges and supplies
 - Estimated from rates schedules and shipping agent discussions
- Local cruise line offices
 - No data

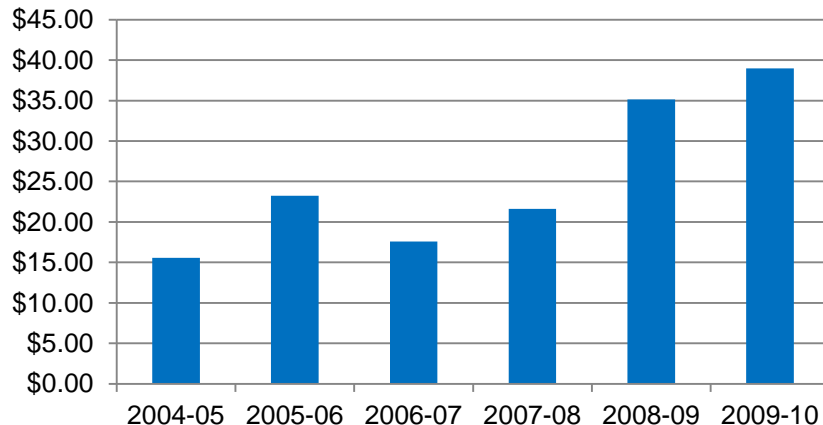
Expenditure estimates (\$ 2009-10)

Passenger Expenditure (\$M)



- All Passenger expenditure:
 - \$262 million (\$43M Int)
 - Up 17% on 08-09

Crew Expenditure (\$M)

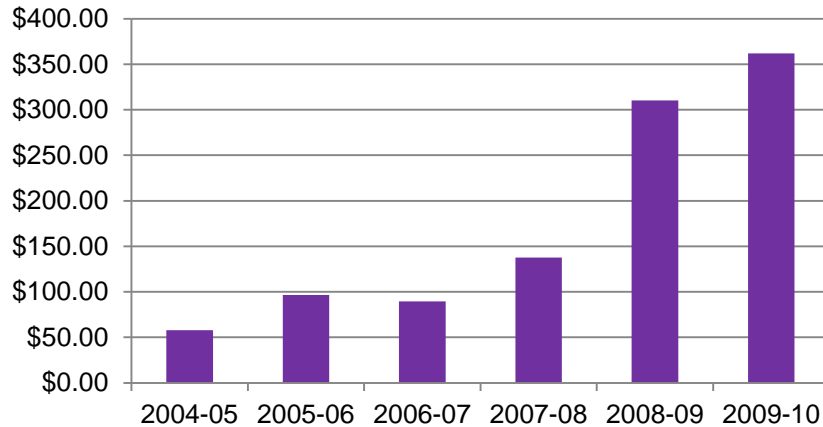


- All Crew expenditure:
 - \$39 million (\$16M Int)
 - Up 11% on 08-09



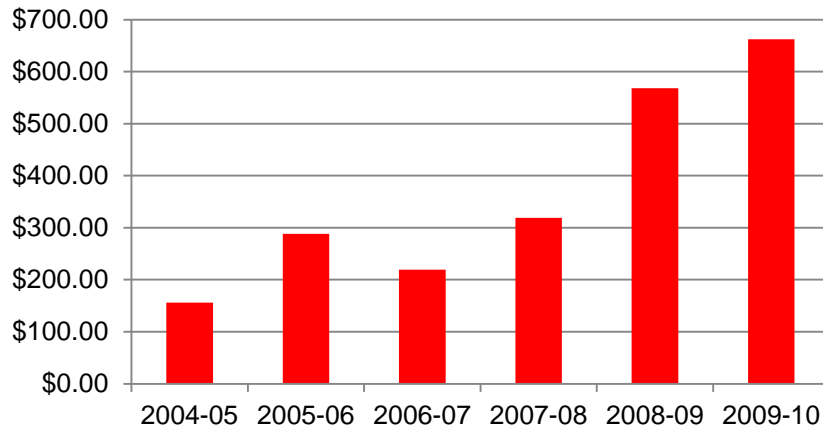
Expenditure estimates (\$ 2009-10)

Port/Supplier Expenditure (\$M)



- Port/supplier expenditure:
 - \$362 million
 - Up 17% on 2007-08

Total Expenditure (\$M)



- Total expenditure:
 - \$662 million (\$420M Int)
 - Up 17% on 2007-08



Australian impact (International + Port)



Impact	2008-09	2009-10	% change
Output (\$M)			
Direct	\$375.2	\$420.9	12.2%
Indirect	\$354.5	\$395.3	11.5%
Total	\$729.6	\$816.2	11.9%
Wages Income (\$M)			
Direct	\$107.0	\$120.0	12.2%
Indirect	\$83.7	\$93.5	11.7%
Total	\$190.7	\$213.5	12.0%
Employment (FTEs)			
Direct	1,792	1,980	10.5%
Indirect	1,454	1,621	11.5%
Total	3,246	3,602	10.9%
Value Added (\$M)			
Direct	\$177.7	\$200.3	12.7%
Indirect	\$160.1	\$178.9	11.7%
Total	\$337.8	\$379.3	12.3%



Australian impact (Int + Dom + Port)



Impact	2008-09	2009-10	% change
Output (\$M)			
Direct	\$568.1	\$662.2	16.6%
Indirect	\$533.3	\$618.8	16.0%
Total	\$1,101.4	\$1,281.1	16.3%
Wages Income (\$M)			
Direct	\$161.2	\$187.9	16.6%
Indirect	\$124.7	\$144.8	16.2%
Total	\$285.9	\$332.8	16.4%
Employment (FTEs)			
Direct	2,772	3,222	16.2%
Indirect	2,195	2,550	16.2%
Total	4,967	5,772	16.2%
Value Added (\$M)			
Direct	\$273.2	\$319.8	17.0%
Indirect	\$238.4	\$276.8	16.1%
Total	\$511.7	\$596.6	16.6%



State & Territory distribution

● Christmas Island



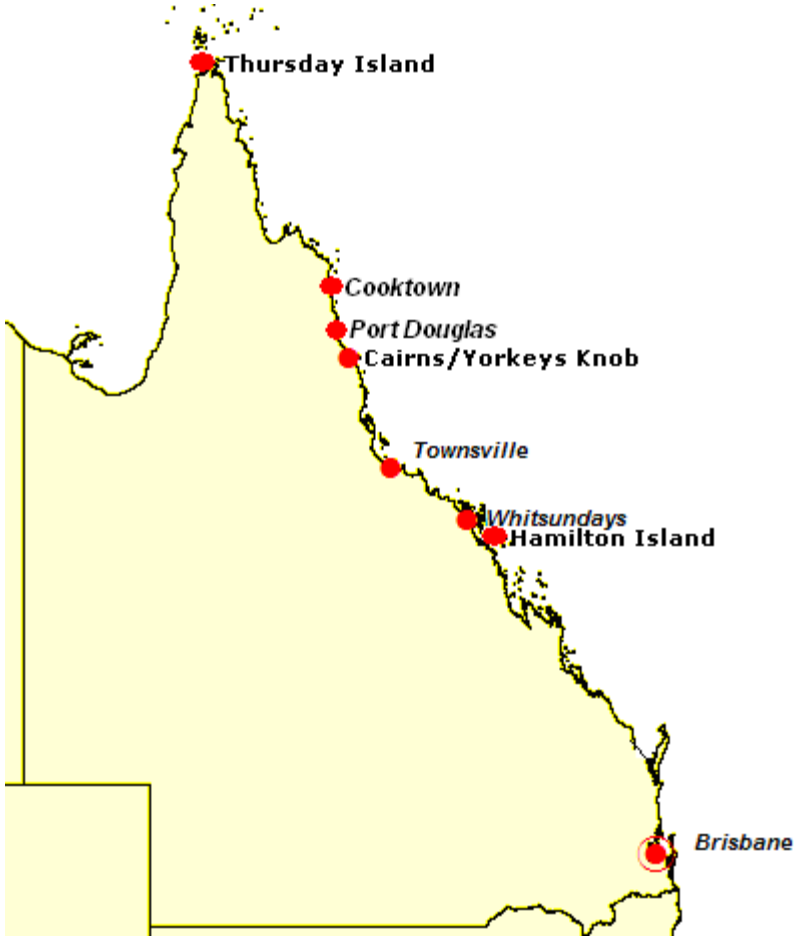
A leading Australian consulting group recognised through the success of our clients



- 3 ports
- 125 visits
- 90 base - Sydney
- 384,692 passenger days
- 78,058 crew days
- \$298M expenditure



- 2 ports
- 49 visits
- 16 base - Melbourne
- 110,521 passenger days
- 25,211 crew days
- \$94M expenditure

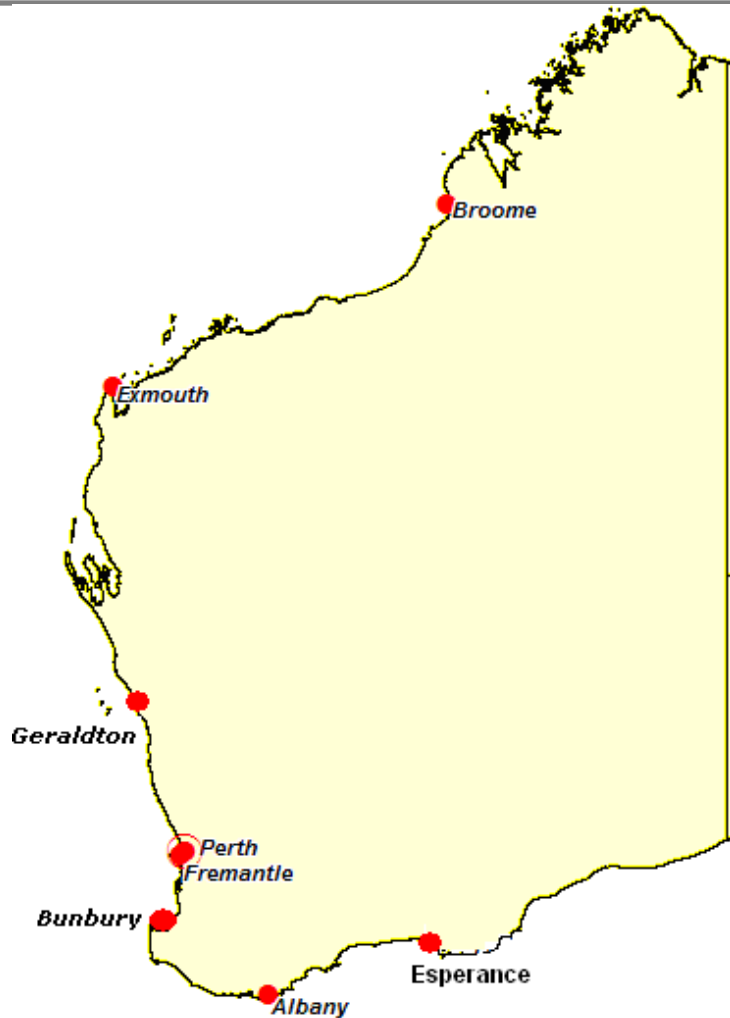


- 8 ports
- 182 visits
- 25 base – Brisbane
- 3 base - Cairns
- 300,317 passenger days
- 67,565 crew days
- \$150M expenditure

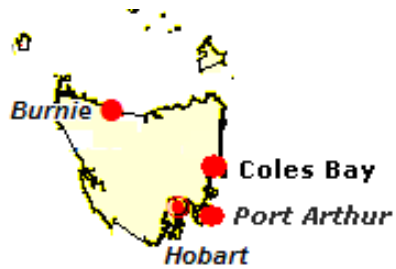


- 3 ports
- 27 visits
- 6 base – Adelaide
- 26,800 passenger days
- 7,750 crew days
- \$9M expenditure

Western Australia 2009-10

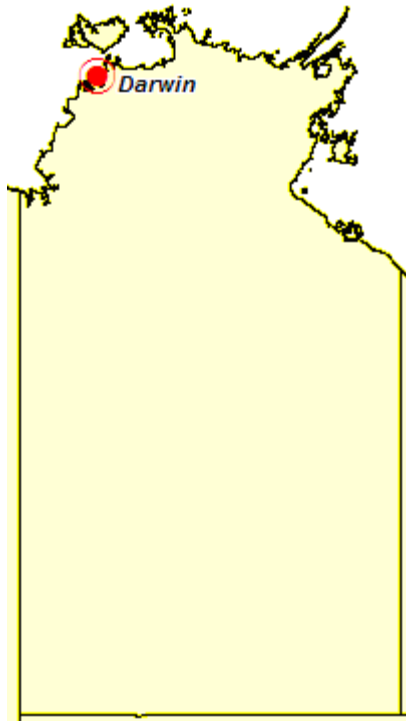


- 7 ports
- 106 visits
- 10 base – Fremantle
- 138,695 passenger days
- 34,362 crew days
- \$63M expenditure



- 4 ports
- 55 visits
- 68,511 passenger days
- 18,210 crew days
- \$12M expenditure

Northern Territory 2009-10



- 1 port
- 33 visits
- 7 base - Darwin
- 33,854 passenger days
- 9,018 crew days
- \$34M expenditure

New Ships for 2010-11

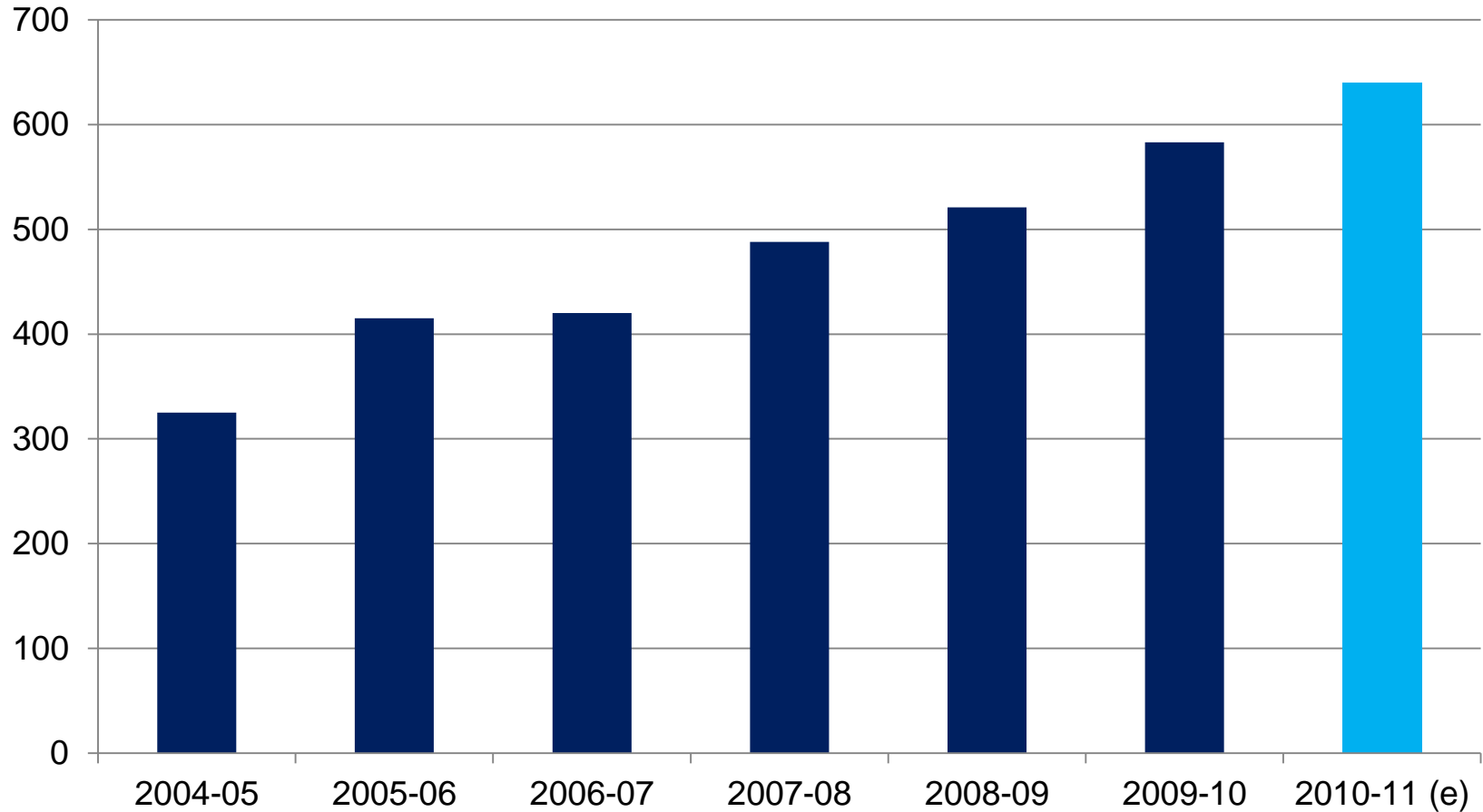
- Cruise West
 - Cunard
 - P&O Cruises
 - Royal Caribbean Cruises
 - Royal Caribbean Cruises
 - Seabourn Cruise Lines
 - Seabourn Cruise Lines
- Spirit of Oceanus (120)
Queen Elizabeth (2,092)
Pacific Pearl (1,800)
Radiance of the Seas (2,112)
Celebrity Century (1,814)
Seabourn Sojourn (450)
Seabourn Pride (208)



Outlook for 2010-11 - anticipated to grow by 8-10%



Cruise Ship Visits



A leading Australian consulting group recognised through the success of our clients

Thank you

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