

Economic Impact of the Cruise Shipping Industry in Australia 2010-11

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Research commissioned by CDU & Tourism Australia

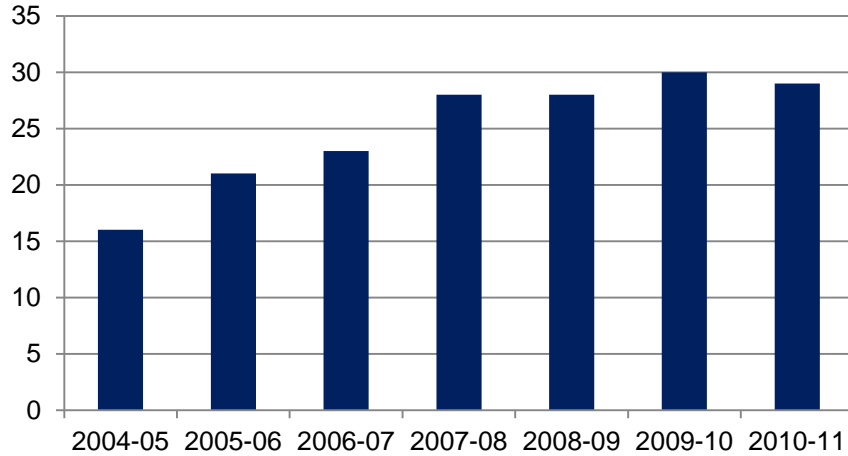
- Study background
- Cruise industry growth characteristics
- Economic impact model
- National, State & Territory economic impacts
- Outlook for 2011-12

Research conducted every year for seven years

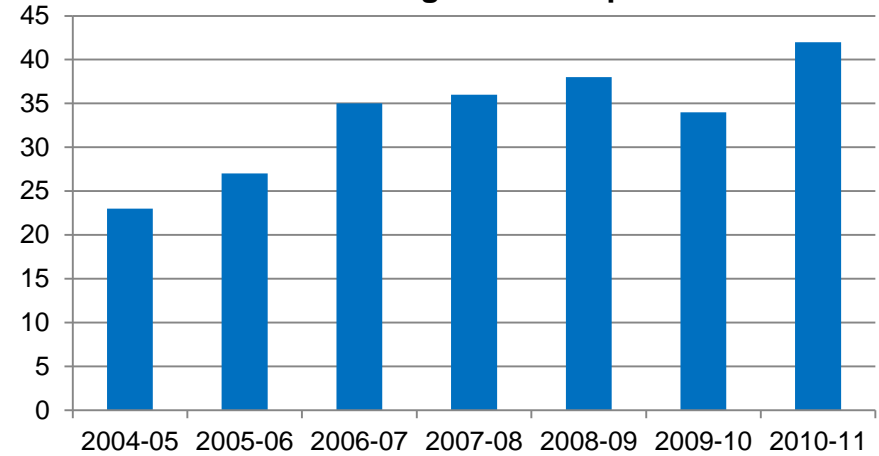
- Project supported by CDU & Tourism Australia plus Commonwealth Government (2004-05 to 2007-08)
- Project supported by CDU (2008-09 to 2010-11)
- Cruise shipping: *“A vessel undertaking scheduled deep water cruises of two days or more with a passenger capacity of 100 or more”*
- Passenger & crew expenditure surveys
- Sydney passenger survey undertaken in 2011 commissioned by CDU and DRET with support from Sydney Ports and Tourism NSW

Cruise indicators show a positive trend

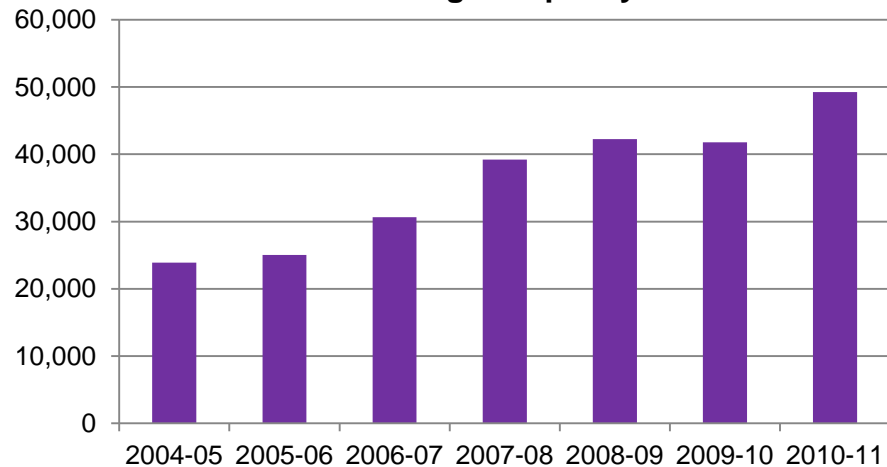
Australian Ports Visited



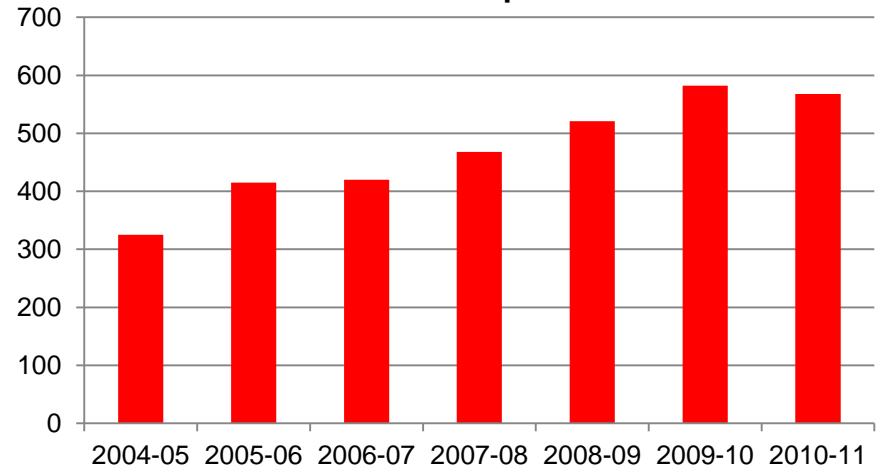
Visiting Cruise Ships



Passenger Capacity



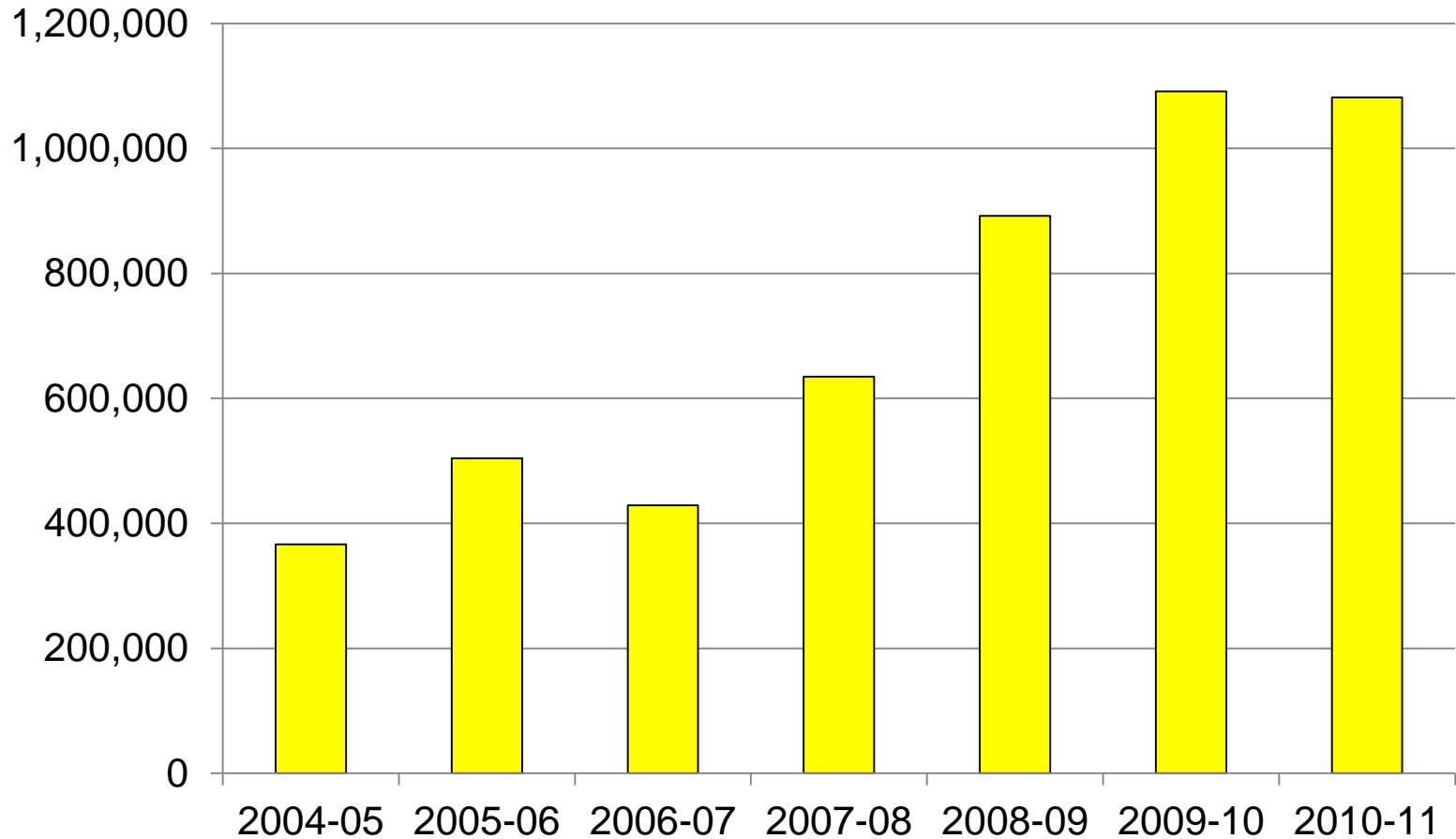
Cruise Ship Visits



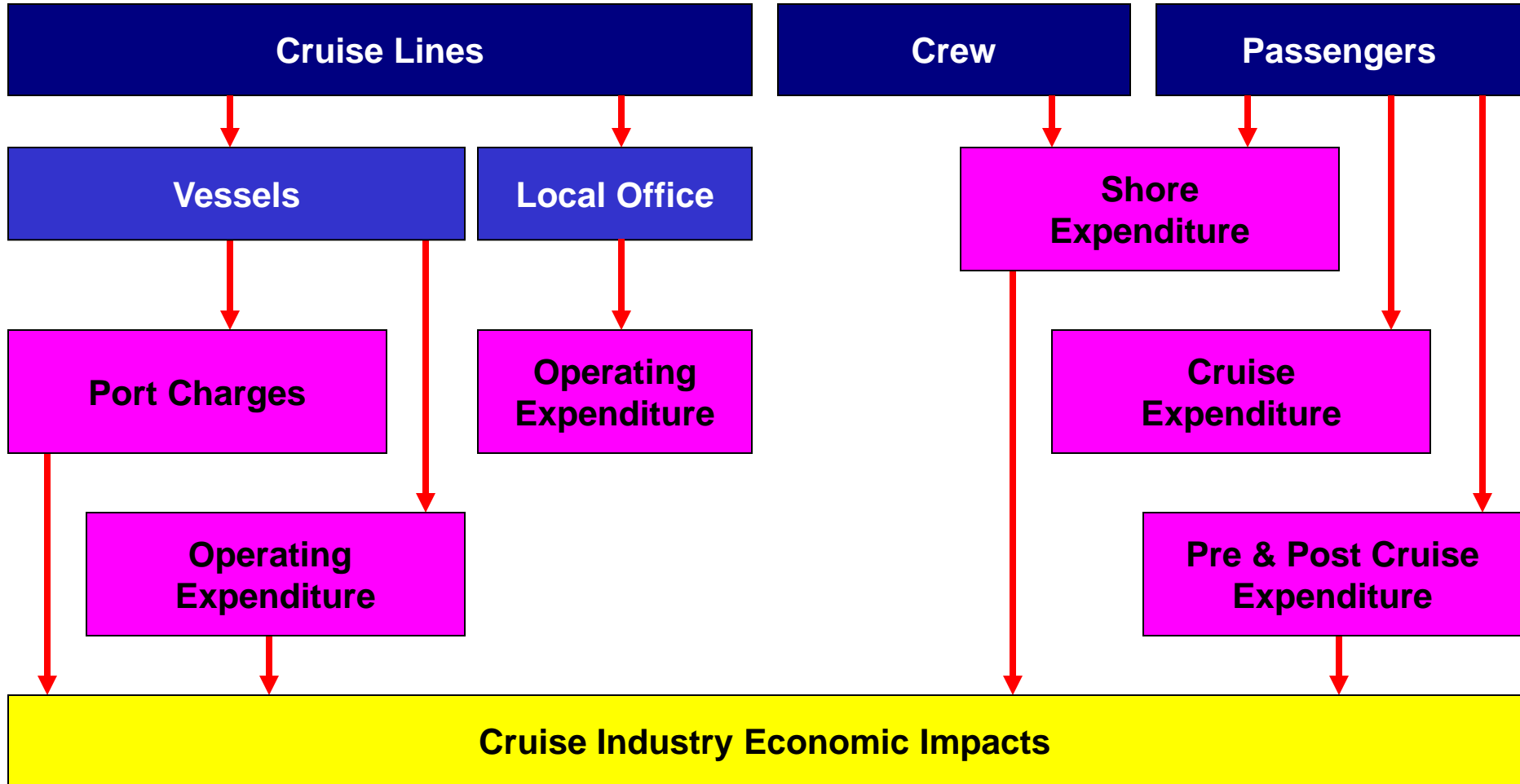
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Passenger days in port = more spending

Passenger Days at Port



Cruise industry expenditure



Economic assumptions

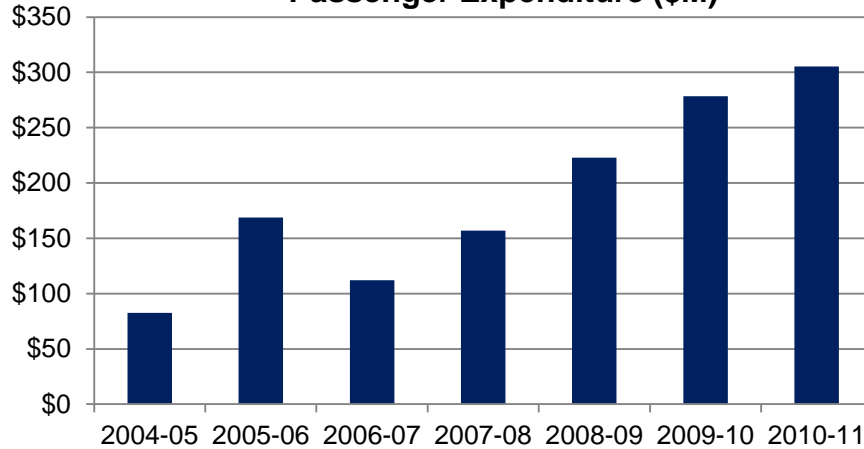
- **Included**
 - On shore passenger expenditure (survey)
 - On shore crew expenditure (survey)
 - Port charges and supplies (estimated)
- **Excluded**
 - Passenger cruise expenditure
 - Local cruise line office operating expenditure (non port activity)
 - Any port or vessel capital expenditure
- **Impacts**
 - 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)
 - 2009-10 (Tasmania, Darwin, Melbourne)
 - 2010-11 (Sydney)
- Port charges and supplies
 - Estimated from rates schedules and shipping agent discussions
- Local cruise line offices
 - No data

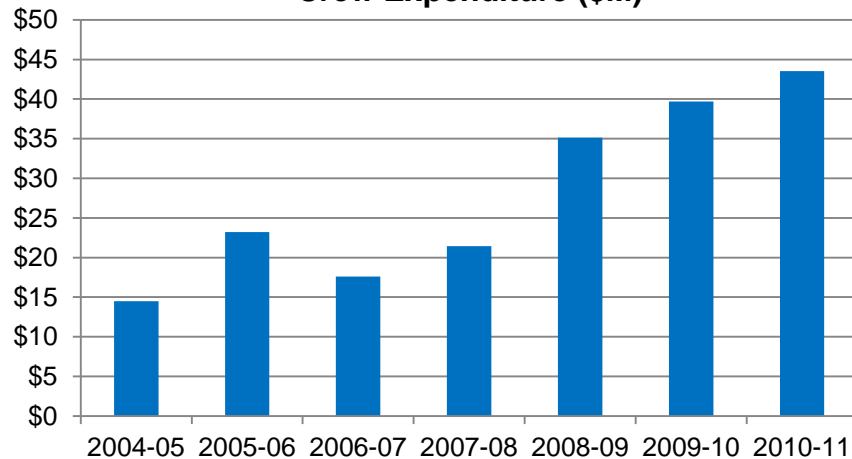
Expenditure estimates (\$ 2010-11)

Passenger Expenditure (\$M)



- All Passenger expenditure:
 - \$305 million (\$43M Int)
 - Up 10% on 09-10

Crew Expenditure (\$M)

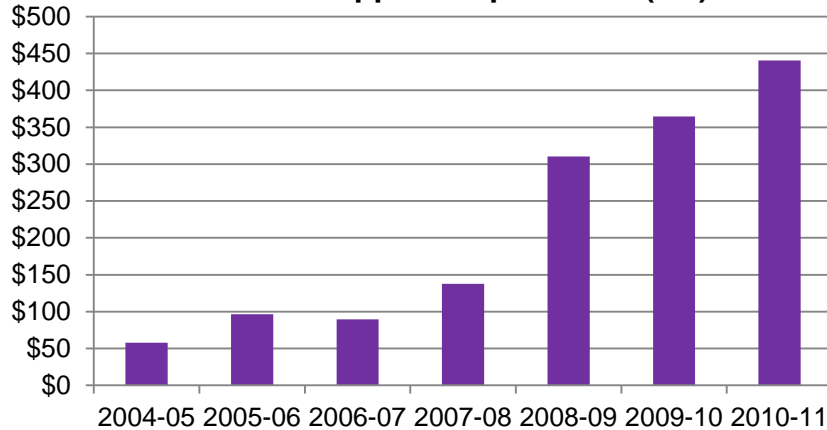


- All Crew expenditure:
 - \$44 million (\$16M Int)
 - Up 10% on 09-10



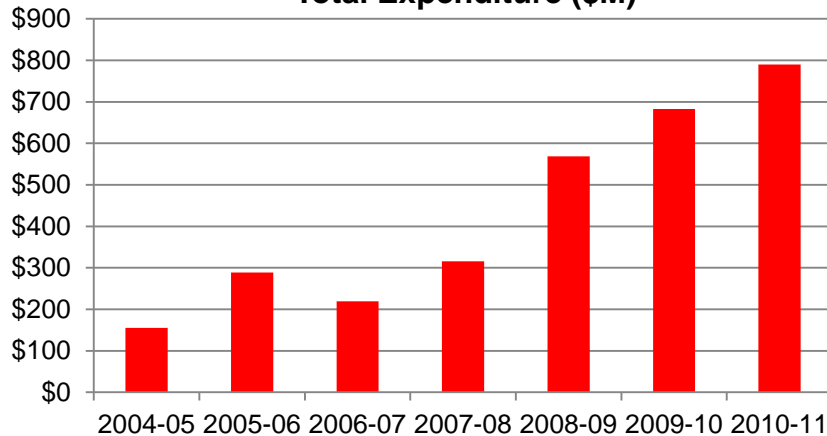
Expenditure estimates (\$ 2010-11)

Port/Supplier Expenditure (\$M)



- Port/supplier expenditure:
 - \$441 million
 - Up 21% on 2009-10

Total Expenditure (\$M)



- Total expenditure:
 - \$790 million
 - Up 16% on 2009-10



Australian impact (International + Port)



Impact	2009-10	2010-11	% change
Output (\$M)			
Direct	\$424.5	\$499.2	17.6%
Indirect	\$397.6	\$475.5	19.6%
Total	\$822.1	\$974.7	18.6%
Wages Income (\$M)			
Direct	\$121.0	\$142.0	17.4%
Indirect	\$94.1	\$112.5	19.5%
Total	\$215.1	\$254.5	18.3%
Employment (FTEs)			
Direct	2,000	2,326	16.3%
Indirect	1,632	1,944	19.1%
Total	3,632	4,270	17.6%
Value Added (\$M)			
Direct	\$202.5	\$234.1	15.6%
Indirect	\$180.0	\$215.0	19.4%
Total	\$382.6	\$449.1	17.4%



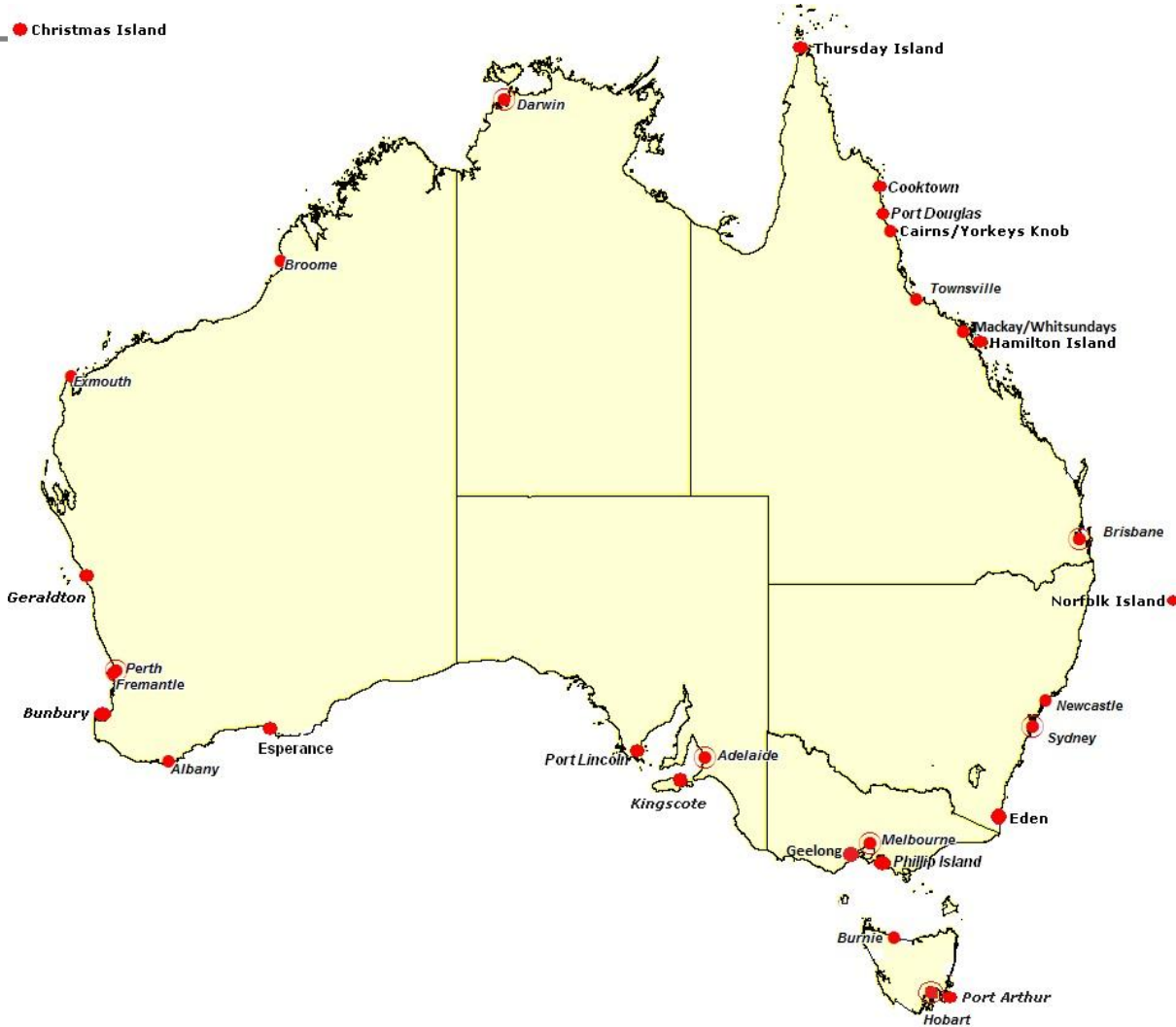
Australian impact (Int + Dom + Port)



Impact	2009-10	2010-11	% change
Output (\$M)			
Direct	\$682.5	\$789.5	15.7%
Indirect	\$636.5	\$734.0	15.3%
Total	\$1,319.1	\$1,523.5	15.5%
Wages Income (\$M)			
Direct	\$193.6	\$238.9	23.4%
Indirect	\$148.9	\$171.2	15.0%
Total	\$342.5	\$410.2	19.8%
Employment (FTEs)			
Direct	3,313	4,332	30.8%
Indirect	2,623	3,047	16.1%
Total	5,937	7,379	24.3%
Value Added (\$M)			
Direct	\$330.3	\$381.1	15.4%
Indirect	\$284.7	\$328.1	15.3%
Total	\$615.0	\$709.2	15.3%



State & Territory Distribution



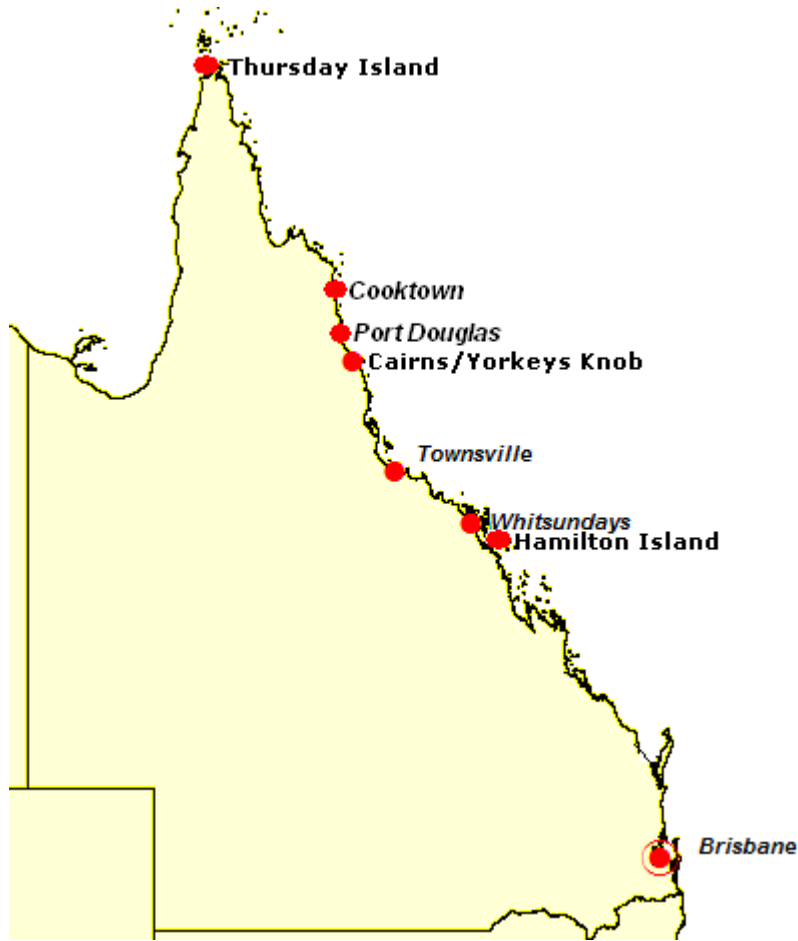
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- 3 ports
- 164 visits
- 119 base – Sydney
- 10 base - Newcastle
- 515,529 passenger days
- 110,474 crew days
- \$424M expenditure



- 3 ports
- 39 visits
- 11 base - Melbourne
- 68,961 passenger days
- 12,264 crew days
- \$69M expenditure

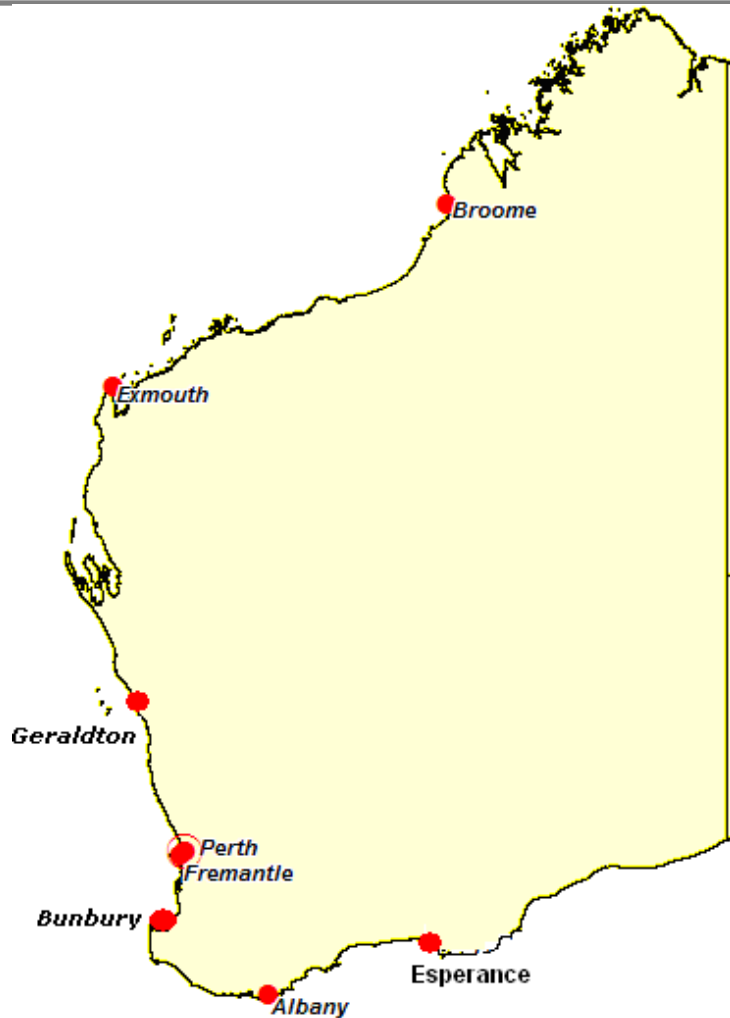


- 8 ports
- 193 visits
- 40 base – Brisbane
- 4 base - Cairns
- 328,863 passenger days
- 63,944 crew days
- \$190M expenditure



- 3 ports
- 16 visits
- 13,205 passenger days
- 4,011 crew days
- \$4M expenditure

Western Australia 2010-11

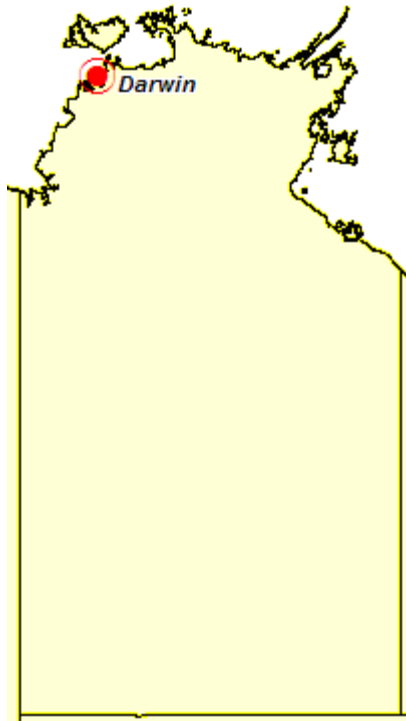


- 7 ports
- 68 visits
- 12 base – Fremantle
- 67,586 passenger days
- 18,785 crew days
- \$43M expenditure



- 3 ports
- 40 visits
- 45,681 passenger days
- 11,910 crew days
- \$8M expenditure

Northern Territory 2010-11



- 1 port
- 46 visits
- 9 base - Darwin
- 40,056 passenger days
- 11,504 crew days
- \$53M expenditure

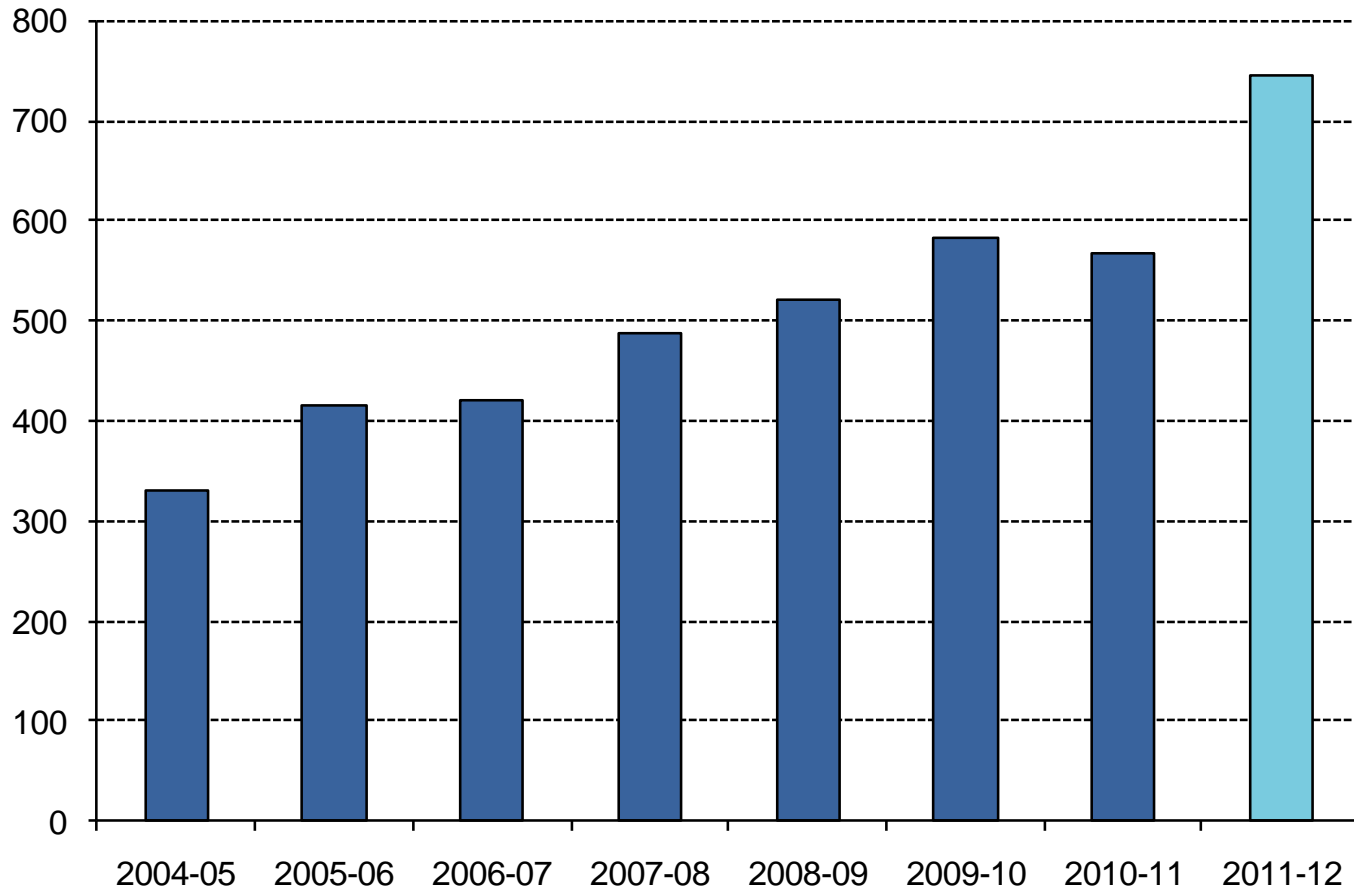
New Ships for 2011-12

- Costa Cruises
Costa Deliziosa (2,828)
- Compagnie du Ponant
L'Austral (264)
- Cruise West
Spirit of Oceanus (120)
- Holland America Line
Zaandam (1,432)
- Oceania Cruises
Ocean Princess (826)
- Royal Caribbean Cruises
Radiance of the Seas (2,112)
- Royal Caribbean Cruises
Celebrity Century (1,814)
- Seabourn Cruise Lines
Seabourn Pride (208)
- Spirit of Adventure Cruises
Spirit of Adventure (348)
- Voyages of Discovery
Discovery (698)



Outlook for 2011-12 - anticipated to grow by 40%

Cruise Ship Visits



Thank you

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