Mavigating NEW DESTINATIONS

DOMESTICATE ~ THE GROWTH OF DOMESTIC CRUISING

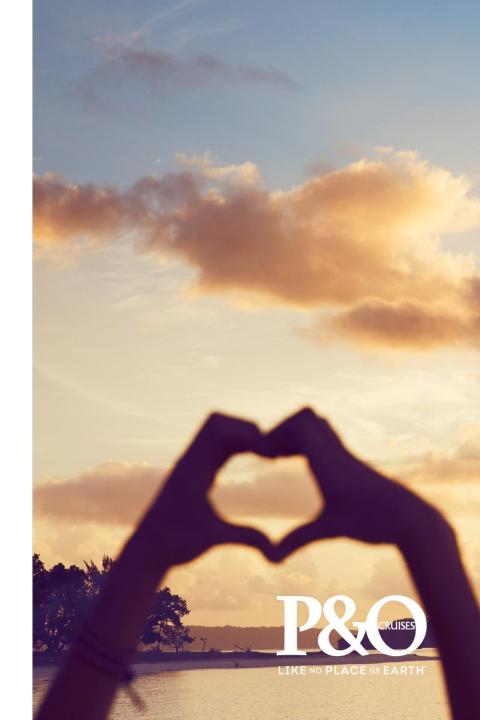




FINDINGS OF OUR STUDY

What we discovered about Australians hasn't really surprised us. But it has helped us be confident of two things:-

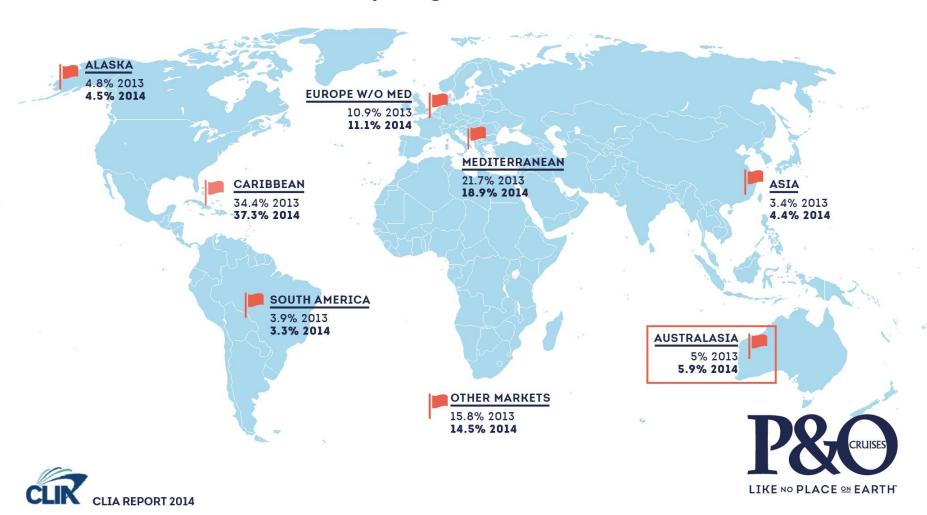
- » There has never been a better time to be part of our industry and
- » Working together, we have a great opportunity to redefine cruise tourism in Australia.



AUSTRALIA'S CAPACITY MARKET SHARE IS GROWING

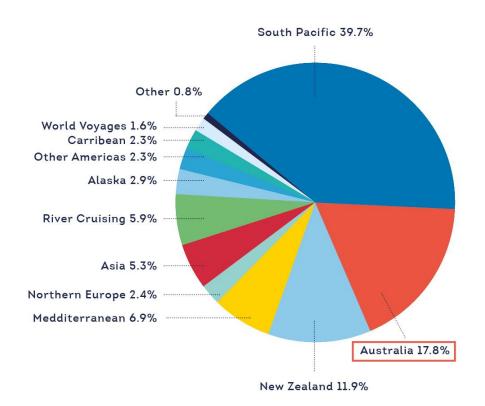
GLOBAL DEPLOYMENT

~ Capacity Market Share ~



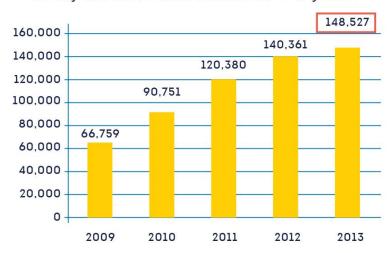
AND MANY ARE CRUISING IN AUSTRALIA...

Destination Share*



Australia

A rise in the number of coastal and short break cruise options in recent years has made Australia the destination of choice for almost 150,000 cruise passengers, representing 18 per cent of the total market. While passenger numbers are just 6 per cent higher than in 2012 for this market, the number of Australians choosing the cruise locally has more than doubled in four years.







2 NIGHT GETAWAYS LARGEST SEGMENT IN TRAVEL

HOLIDAY TIME IS PRECIOUS - MANY NEEDS MUST BE MET

Holidays need to fulfil a number of needs to meet the needs of Australians - appealing to the entire travel party.

SOCIAL MOTIVATION



P&O REVITALISES CRUISE TOURISM

- » In partnership with our local industry
- » More cruises to more ports in Australia
- » Australia's home brand
- Sustainability depends on our collective ability to deliver the freedom, quality and choice Australians want.





WHO IS THE CONTEMPORARY AUSTRALIAN AND WHAT DO THEY WANT FOR THEIR HOLIDAYS?

AUSTRALIANS HAVE CHANGED

MULTI CULTURAL SOCIETY

One quarter of Australians were born overseas.

MORE WOMEN HAVE A DEGREE THAN MEN.

Half the workforce is now female and about 25% of children are born outside of marriage. One parent family is mainstream.

PACE OF TECHNOLOGY HAS CHANGED EVERYTHING

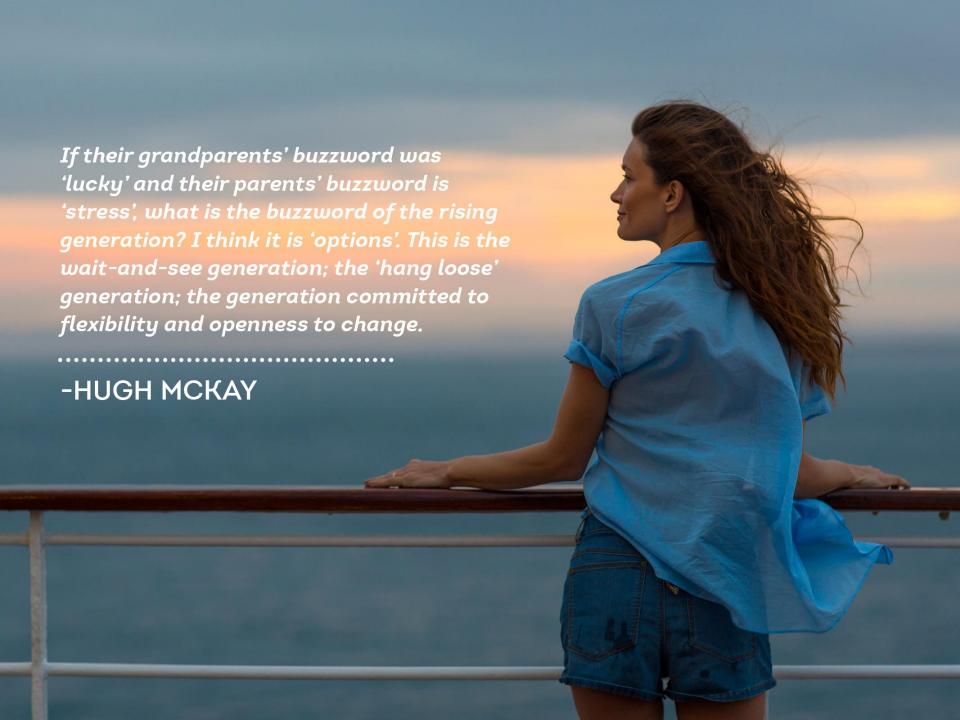
We are the most connected people on the planet, Australians have adopted faster than consumers in most other developed countries.



Having grown up in a period of change, Australians are barely conscious of the magnitude or pace of change.

Now with more diversity of thought, of attitudes, of values and of behaviour Australians refuse to be pigeonholed.





CONTEMPORARY AUSTRALIANS EXPECT CHANGE AND THEY WANT OPTIONS

- » The Australian cruiser wants bespoke treatment.
- » The growing cruise tourist of today is likely to be over 30 and under 55 in age.

THEY WANT
NEW DESTINATIONS

THEY WANT FREEDOM!



-The freedom TO BE WHO I WANT; TO GET WHAT I WANT AND WHEN I WANT IT.



WHAT DOES FREEDOM MEAN

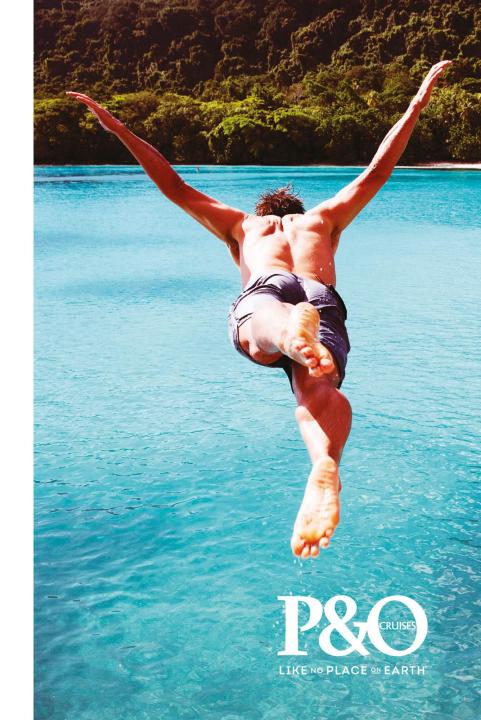
CHANGE & OPTIONS:

A different location every day. Flexibility of a long or short cruise.

Relax or go on an adventure.

Choice of when and what to eat.

Liberation from worry about money.





P&OISLANDS

Perfect for first time cruisers or those after a quick retreat to paradise, this is the best way to sample the Pacific Islands.

P&O SEA ASIA

Explore Southeast Asia the easy way and cruise to some of the best ports in Thailand, Cambodia, Indonesia, Malaysia, Singapore and Vietnam from 7 to 18 nights.

P&O SEA BREAKS

Use your holiday time wisely. With no flights, no hotels and no worries, your getaway begins as soon as you step onboard.

P&O EXPLORER

The adventurous cruiser can immerse themselves in the sounds and cultures of destinations like Papua New Guinea, Solomon Islands, Samoa, New Zealand and more.

P&O SEA AUSTRALIA

Take the scenic route, discover Australia's favourite coastal destinations and bask in the beauty of our famous natural wonders.

P&O MAIN EVENTS

Take your special event to sea and let us do the hard work. Enjoy Christmas New Year's, Australia day and more in complete relaxation.

MORE SHORT CRUISES FROM MORE HOME PORTS









NEW DESTINATIONS - MOOLOOLABA



NEW DESTINATIONS - PORTLAND









NEW DESTINATIONS - MORNINGTON PENINSULA









NEW DESTINATIONS - EDEN





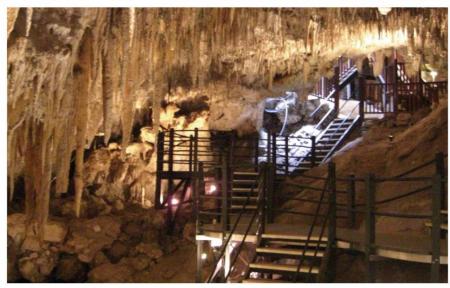




NEW DESTINATIONS - BUSSELTON (MARGARET RIVER)

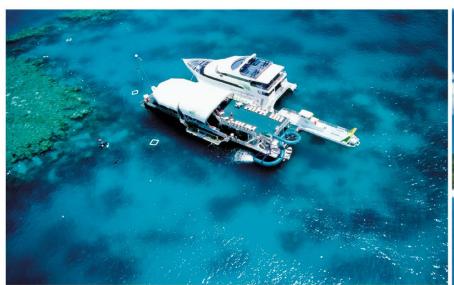








NEW DESTINATIONS - HAMILTON ISLAND







NEW DESTINATIONS - GLADSTONE







THE BENEFITS OF CRUISING





3.3 million eggs



585,000 kilograms of poultry



260,000 bottles of wine

CHALLENGES

Delivering unmatched experiences including embarkation,
disembarkation, transfers, on-shore destinations and experiences.
••••••
Ship to shore access.
•••••
Port side infrastructure.
•••••
Coach capacity.
Keeping costs contained so we remain competitive.



WORKING TOGETHER

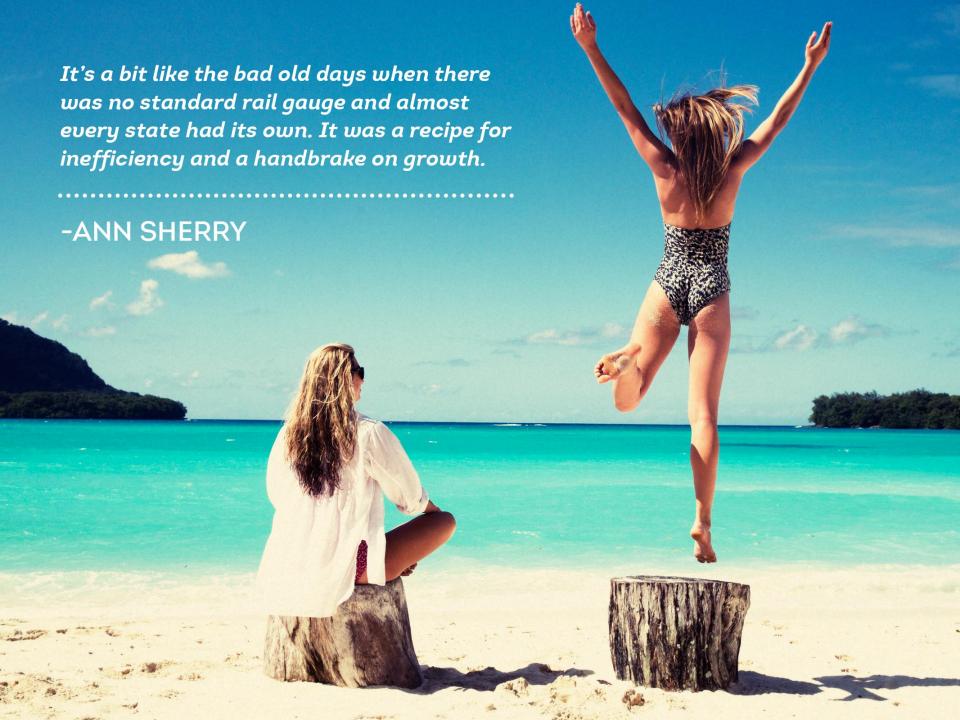
UNDERSTAND THAT AUSTRALIANS HAVE CHANGED.

LOCAL CRUISE TOURISM IS GROWING.

OVERSEAS HOLIDAYS IS GROWING.

DOMESTIC CRUISING IS EXPENSIVE

TO PROVIDE VALUE FOR MONEY
DELIVER UNMATCHED EXPERIENCES.











THANK

