

The Aussie Cruise Sector Infrastructure Developments and Growth

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How Important Is Cruise?

- 1,450 Cruise ship visit days by around 55 different ships
- Calling to 45 destinations
- Driving Regional Dispersal
- 3 Million passenger days in port
- Contributing \$4.8 billion to the Australian economy



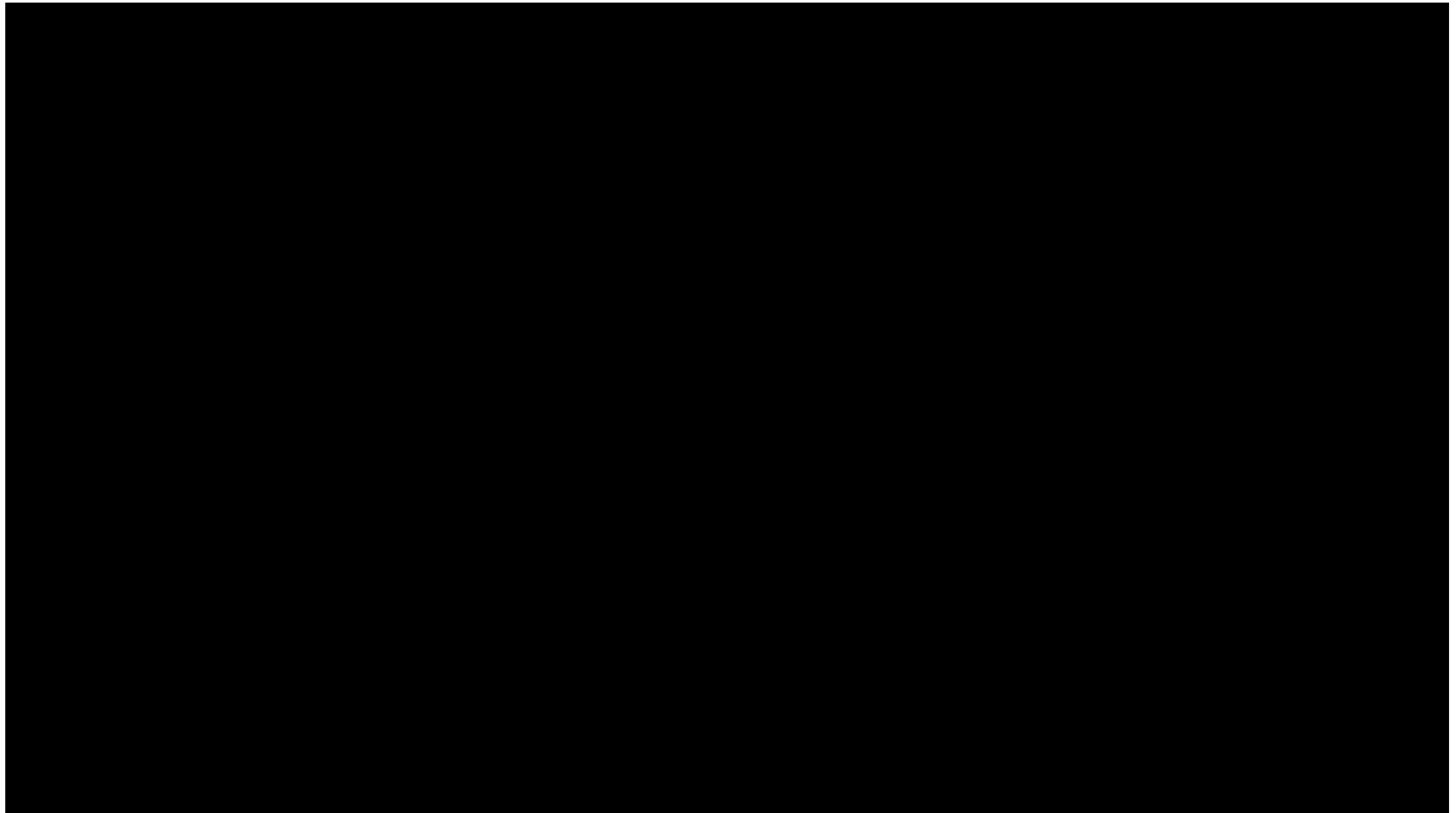
Growth projections

- Growth flattened off in 2018/19 and will remain reasonably flat in 2019/20 due to capacity constraints
- Next growth curve from 2020/21
- 190 bookings for Brisbane's new terminal in 2020/21
- Key will be how much organic growth is possible combined with the impact of Infrastructure limitations

Infrastructure is the key



Brisbane International Cruise Terminal





Eden Wharf Extension

- increasing calls from 16 to 22 in the 2019/20 season
- 80 more regional jobs created in tourism, hospitality and stevedoring
- driving regional dispersal



Cairns Shipping Development Project

- Widening and deepening the existing Trinity Inlet shipping channel at a cost of up to \$127 million.
- Will facilitate cruise ship growth for vessels up to 300m, with a forecast demand of up to 150 calls through the Port of Cairns by 2031.
- Dredging and wharf upgrade works to be completed in 2020.



- Channel Optimisation Program
- Cruise Gangway
- Kimberley Marine Support Base

Broome

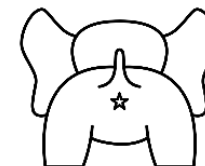
Sydney – The in the Room

- Garden Island should logically be shared with Cruise – but we can't wait for a seismic shift in federal political will and Navy thinking
- Yarra Bay in Port Botany is currently the subject of a Detailed Business Case. It can be made to work if:-
 - We adequately address community concerns
 - We work in Partnership with one or more Cruise Lines
 - We pool the collective will of the NSW Government, Cruise Lines, CLIA, ACA, NZCA, Business Chambers, TTF and other Tourism Peak Bodies.....

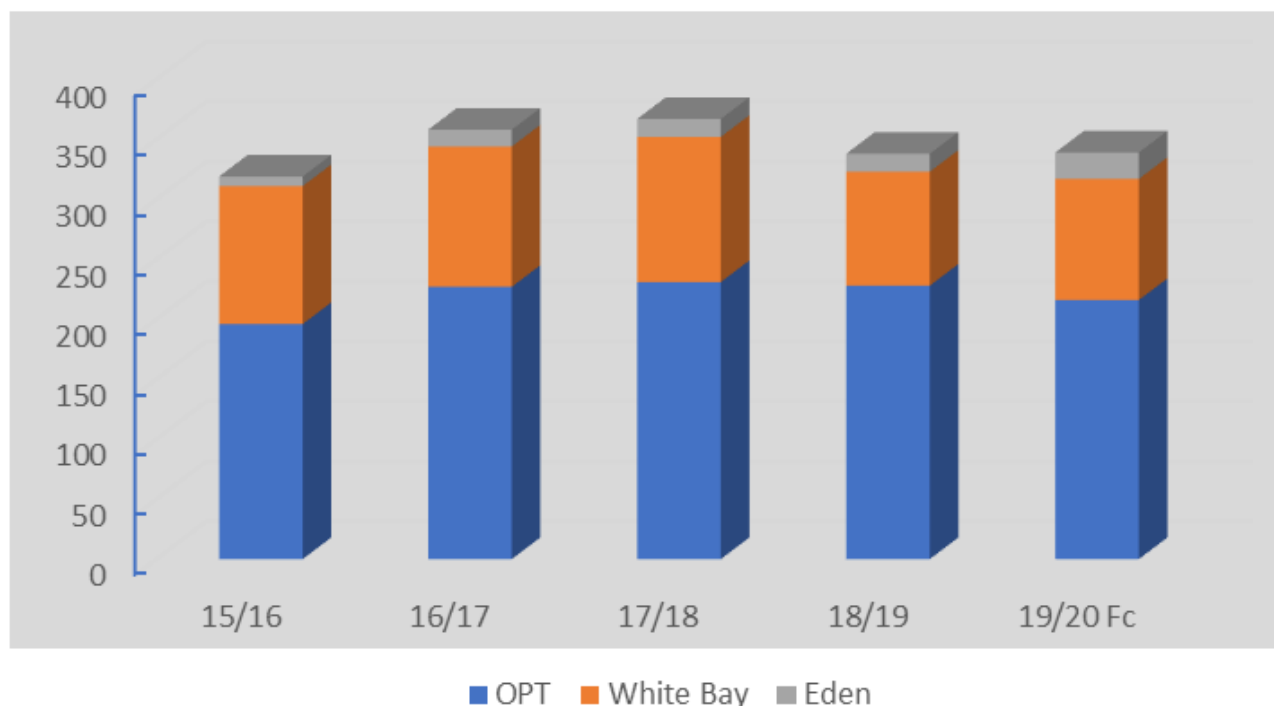
Sydney / NSW Growth



or



Port Authority of NSW Cruise Ship Calls



Key Elements for Regional Success

- Effective dialogue between Cruise Lines, Ports and Destinations
- Working as a whole region – each port has to help make an itinerary work
- Always striving to deliver economic benefit to the port, the destination, and the local community
- Work on Partnerships to help cement the benefits above, and pave the way for faster delivery of infrastructure

Industry Challenges

- Changing Perceptions
 - Force a proper debate on over tourism
 - Bring facts to the table around environmental damage
 - Be sensitive to visual impact
- Considering Cruise as an integral and valuable component of the overall visitor economy
- Continuing to deliver quality destination experiences during high volume days
- Balancing Community and Industry needs
- Avoiding over-regulation by being adaptable and responsive



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