

DSSN Update

Glenn Caldwell

General Manager

- DSSN Directors Update
- Visitor Economy Performance.
- Connectivity Project
- Cruise Project Update
- ATDW Update

DSSN Board as of 1st July 2023



Top (L-R): Christina Tulloch, Fiona Dalton and Andrew Macdonald
Bottom (L-R): Shaelee Welchman and David Farmer

Domestic Performance

Travel to Sydney Surrounds North Destination Network

Year ended March 2023

Source: National Visitor Surveys, TRA.



OVERVIEW

n/p = not publishable

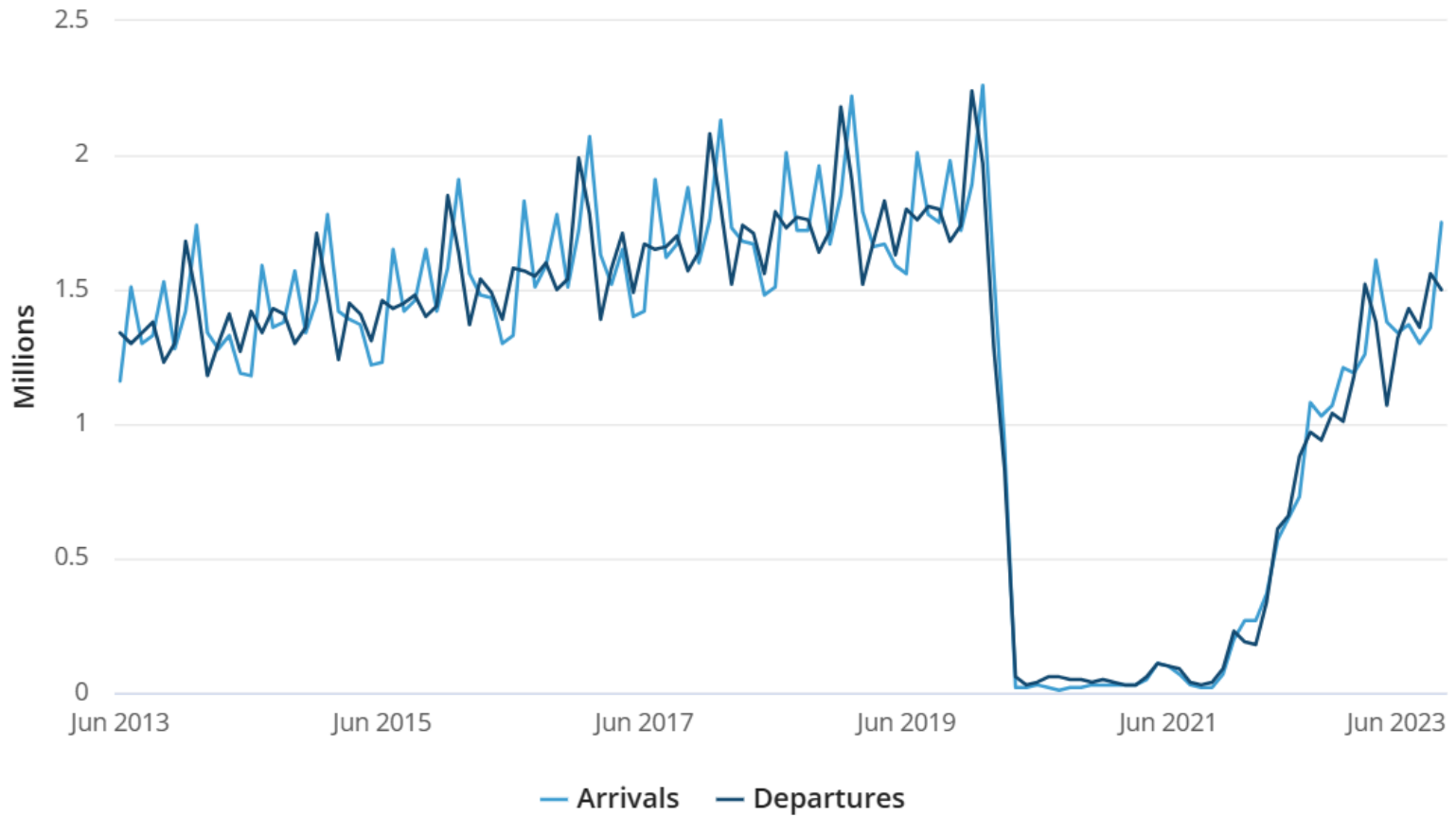
	YE Mar 2014	YE Mar 2015	YE Mar 2016	YE Mar 2017	YE Mar 2018	YE Mar 2019	YE Mar 2020	YE Mar 2021	YE Mar 2022	YE Mar 2023	% change 2023 vs. 2022
Domestic - overnight & daytrip											
Visitors (000)	12,493	13,625	13,983	14,539	15,207	17,657	18,485	12,703	11,900	16,777	41.0%
Nights (000)	11,141	11,581	11,415	12,195	13,272	15,632	15,432	12,873	12,829	15,991	24.6%
Expenditure (\$M)	\$2,756	\$2,737	\$2,978	\$2,885	\$3,320	\$3,558	\$3,787	\$3,078	\$3,237	\$5,292	63.5%

DOMESTIC OVERNIGHT TRAVEL

Visitors, Nights and Expenditure

	YE Mar 2014	YE Mar 2015	YE Mar 2016	YE Mar 2017	YE Mar 2018	YE Mar 2019	YE Mar 2020	YE Mar 2021	YE Mar 2022	YE Mar 2023	% change 2023 vs. 2022
Visitors (000)	4,074	4,109	4,279	4,521	5,118	5,721	5,786	4,701	4,296	5,965	38.8%
Nights (000)	11,141	11,581	11,415	12,195	13,272	15,632	15,432	12,873	12,829	15,991	24.6%
Average Length of Stay (nights)	2.7	2.8	2.7	2.7	2.6	2.7	2.7	2.7	3.0	2.7	-10.2%
Expenditure (\$M)	\$1,914	\$1,801	\$1,987	\$1,919	\$2,311	\$2,375	\$2,632	\$2,215	\$2,398	\$3,857	60.9%
Spend per visitor per night (\$)	\$172	\$155	\$174	\$157	\$174	\$152	\$171	\$172	\$187	\$241	29.0%
Interstate visitors (000)	572	636	663	659	793	818	910	377	532	882	65.8%
Intrastate visitors (000)	3,502	3,473	3,617	3,862	4,325	4,903	4,876	4,323	3,764	5,082	35.0%
Interstate nights (000)	2,066	2,592	2,341	2,800	2,939	3,498	3,643	1,678	2,377	3,447	45.0%
Intrastate nights (000)	9,075	8,989	9,074	9,395	10,333	12,133	11,789	11,195	10,452	12,543	20.0%
Interstate expenditure (\$M)	\$298	\$348	\$322	\$339	\$429	\$457	\$563	\$184	\$297	\$626	111.0%
Intrastate expenditure (\$M)	\$1,617	\$1,453	\$1,665	\$1,580	\$1,881	\$1,917	\$2,069	\$2,032	\$2,101	\$3,231	53.8%

Total Overseas Arrival and Departures





Destination
Sydney Surrounds North



Newcastle Cruise Project



Connectivity Project



Destination
Sydney Surrounds North



Global Cruise Market

Cruise passenger volume is forecast to reach 106% of 2019 levels in 2023

85% of travellers who have cruised will cruise again – 6% higher than pre pandemic

Australian Ocean Cruise Market

457,200 Australian cruise passengers in the latter part of 2022

By last quarter of 2022, passenger numbers were estimated to have risen to approx. 90% in comparison to same quarter in 2019

70% of Australians are likely to book a cruise in the next two years



Visit No.	Ship name	Visit Date	Pax.	Crew	Previous Port	Next Port
1	Brilliance of the Seas	Saturday, 28 October 2023	2,702	875	Hobart	Sydney
2	Grand Princess (maiden)	Tuesday, 31 October 2023	3,100	1,028	Melbourne	Sydney
3	Diamond Princess	Saturday, 18 November 2023	3,168	1,061	Sydney	Brisbane
4	Viking Orion	Monday, 4 December 2023	954	499	Brisbane	Sydney
5	Seven Seas Explorer	Thursday, 21 December 2023	809	450	Mooloolaba	Sydney
6	Celebrity Edge (maiden)	Friday, 22 December 2023	3,405	1,250	Sydney	Brisbane
7	Seven Seas Explorer	Saturday, 20 January 2024	809	450	Mooloolaba	Sydney
8	Insignia - maiden	Saturday, 24 February 2024	675	390	Sydney	Airlie Beach
9	Silver Shadow	Sunday, 25 February 2024	435	305	Sydney	Mooloolaba
10	Coral Princess	Wednesday, 28 February 2024	2,390	877	Sydney	Brisbane
11	Borealis (maiden)	Thursday, 29 February 2024	1,755	825	Sydney	Cairns
12	Seven Seas Mariner	Saturday, 2 March 2024	769	450	Sydney	Townsville
13	Serenade of the Seas (maiden)	Saturday, 9 March 2024	25,702	875	Sydney	Brisbane
14	Amera (maiden)	Sunday, 10 March 2024	936	560	Brisbane	Sydney
15	Grand Princess	Tuesday, 19 March 2024	3,100	1,028	Airlie Beach	Sydney
16	Nautica (maiden)	Saturday, 23 March 2024	675	390	Sydney	Townsville
17	Coral Princess	Wednesday, 27 March 2024	2,390	877	Sydney	Brisbane
18	Scenic Eclipse 2 (maiden)	Saturday, 20 April 2024	237	183	Sydney	Moreton Island



Destination
Sydney Surrounds North



Shore Excursions

- Mix of cultural, nature and food and wine experiences have high appeal
- Smaller group high end tours for luxury cruise ship passengers e.g Silver Muse
- Tours for younger demographics e.g. millennials – kayaking, walking tours, hip brewery tour with lunch.
- Exclusive access/experiences for cruise guests e.g. meet the wine maker
- Local culture and people - immersive
- Pre and post cruise tours – international guests



Destination
Sydney Surrounds North



Australian Tourism Data Warehouse Update

how ATDW works

Tourism Suppliers enter their listing through the ATDW-Online platform.



STOs review and quality assure the listing ensuring it meets National Content Standards.



Distributors pull the listings that they wish to publish on their digital channel through ATDW's web service.



Consumers can now view ATDW listings on licensed distributor digital channels.



ATDW stores the listings in the national database.



benefits of local operators being on **ATDW**

- Is it completely **FREE!**
- It's their digital shopfront 24 / 7 / 365
- All content is quality assured by a dedicated ATDW support team;
- Achieve local, national and international visibility by listing a profile on ATDW-Online once in a centralised location;
- Be part of a marketplace generating hundreds of million in tourism bookings through our partners;
- Create more online presence through tactical deals and special offers directly to consumers;
- Leverage the marketing and campaign expenditure of TA, STOs and Local or Regional Tourism Organisations;



working together
to drive bookings



Thank you

DSSN Team

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