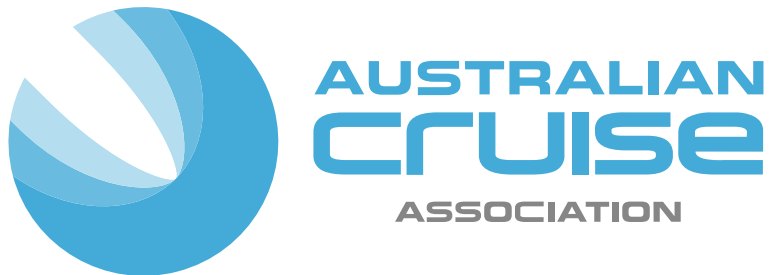


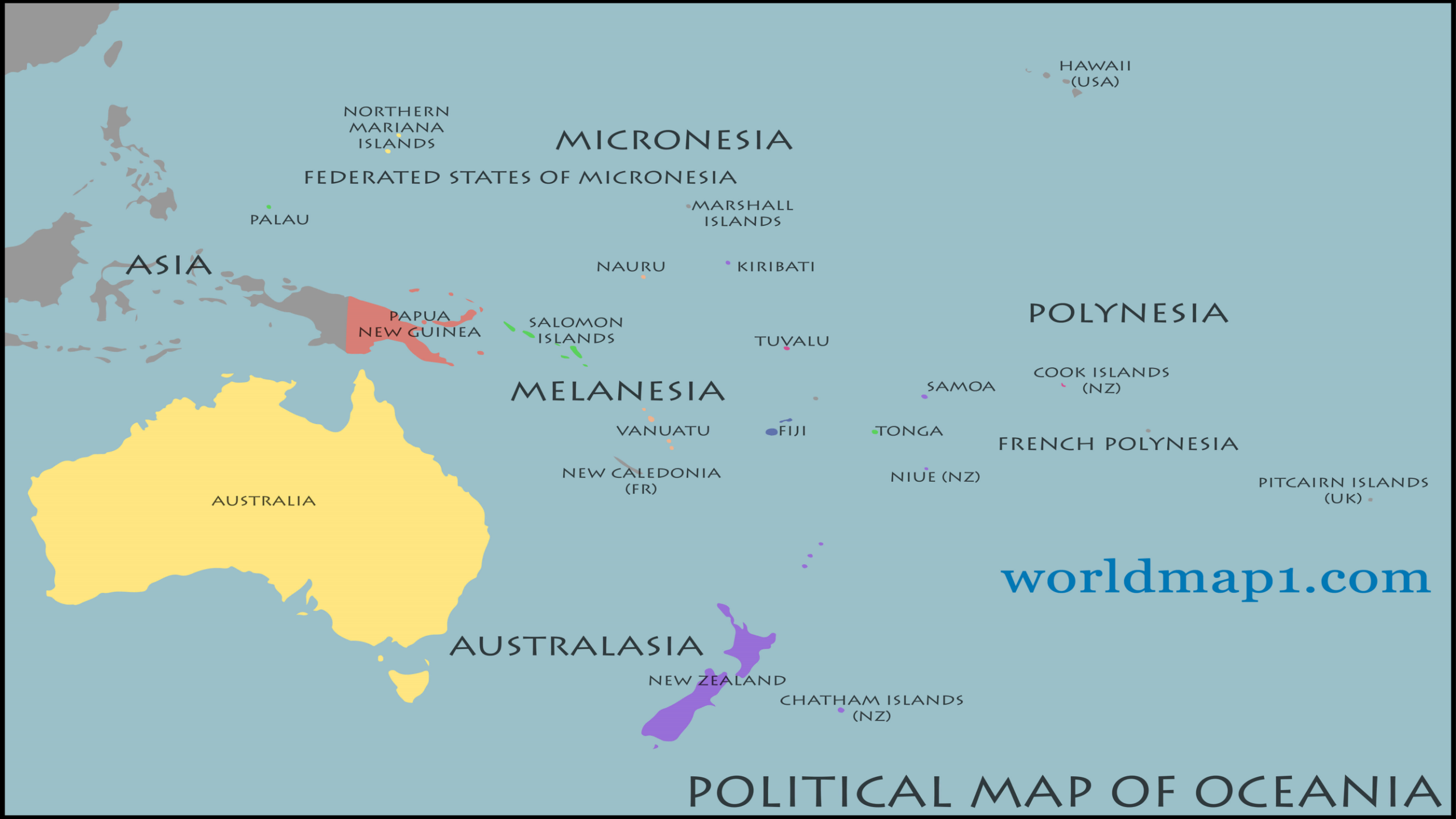
New Zealand in an Oceania Setting

August 2024

Jill Abel

CEO
Australian Cruise Association





HAWAII
(USA)

NORTHERN
MARIANA
ISLANDS

MICRONESIA

FEDERATED STATES OF MICRONESIA

PALAU

MARSHALL
ISLANDS

ASIA

NAURU

KIRIBATI

PAPUA
NEW GUINEA

SALOMON
ISLANDS

TUVALU

POLYNESIA

COOK ISLANDS
(NZ)

SAMOA

FRENCH POLYNESIA

TONGA

NIUE (NZ)

PITCAIRN ISLANDS
(UK)

MELANESIA

VANUATU

FIJI

NEW CALEDONIA
(FR)

AUSTRALIA

AUSTRALASIA

NEW ZEALAND

CHATHAM ISLANDS
(NZ)

worldmap1.com

POLITICAL MAP OF OCEANIA

The Bigger Picture



- Consider future collaboration throughout the region
- Create strategies to share mutual benefits as Asia and China regions rebound
- Better recognise the implication of individual country regulations and how they impact the overall region

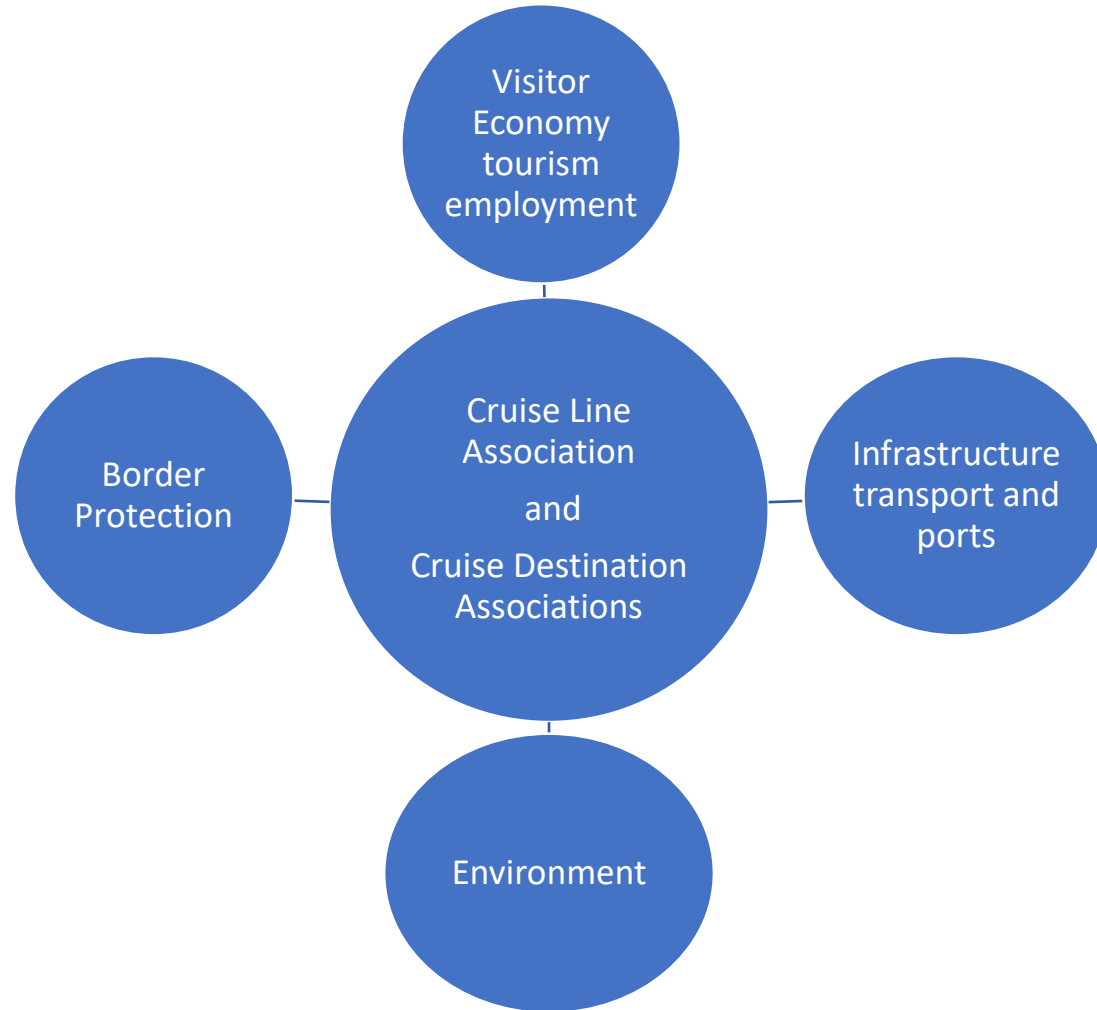
One Year On



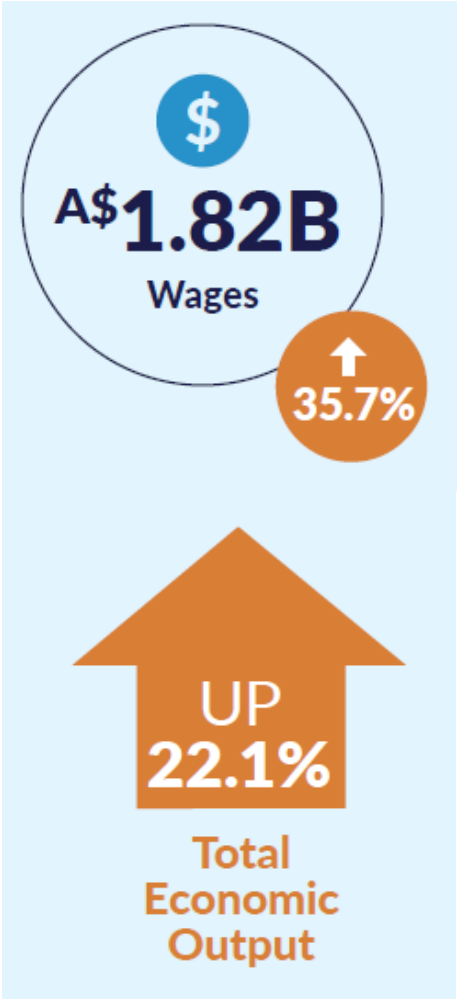
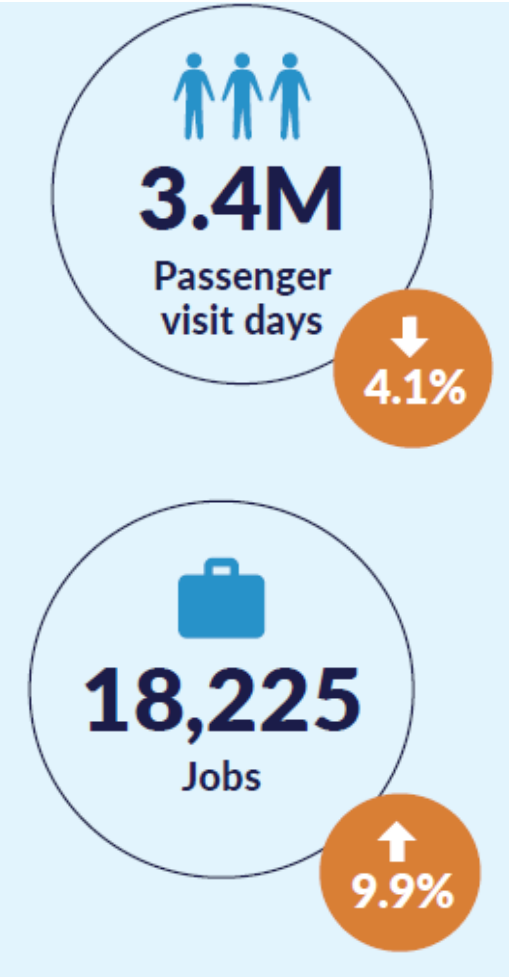
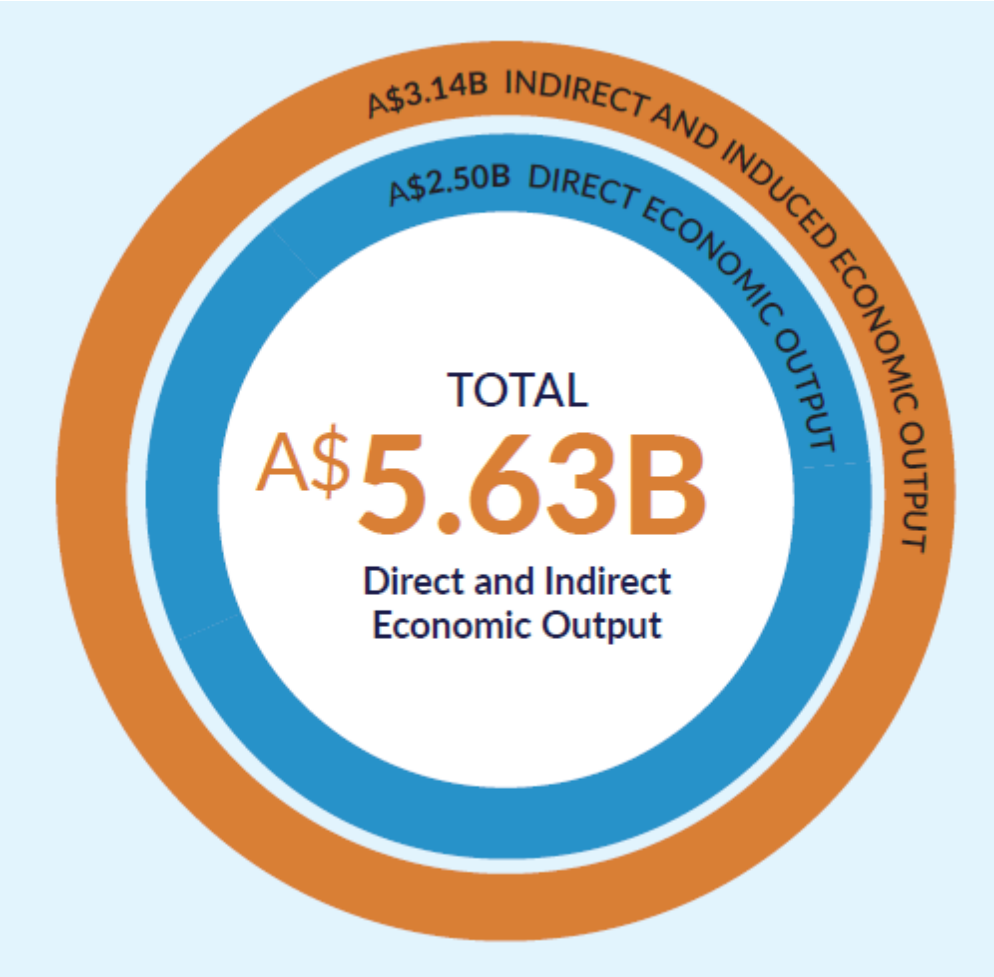
- Grown our connections/collaborations to include Tahiti, Fiji, PNG, NZ and most recently Vanuatu
- Recognising Asia as the world's third largest source region behind USA and Western Europe, with China still to fully recover
- The implications of individual country regulations have never been clearer
- Continual advocacy with Governments is a priority

BUT!!!

Whole of Government Approach

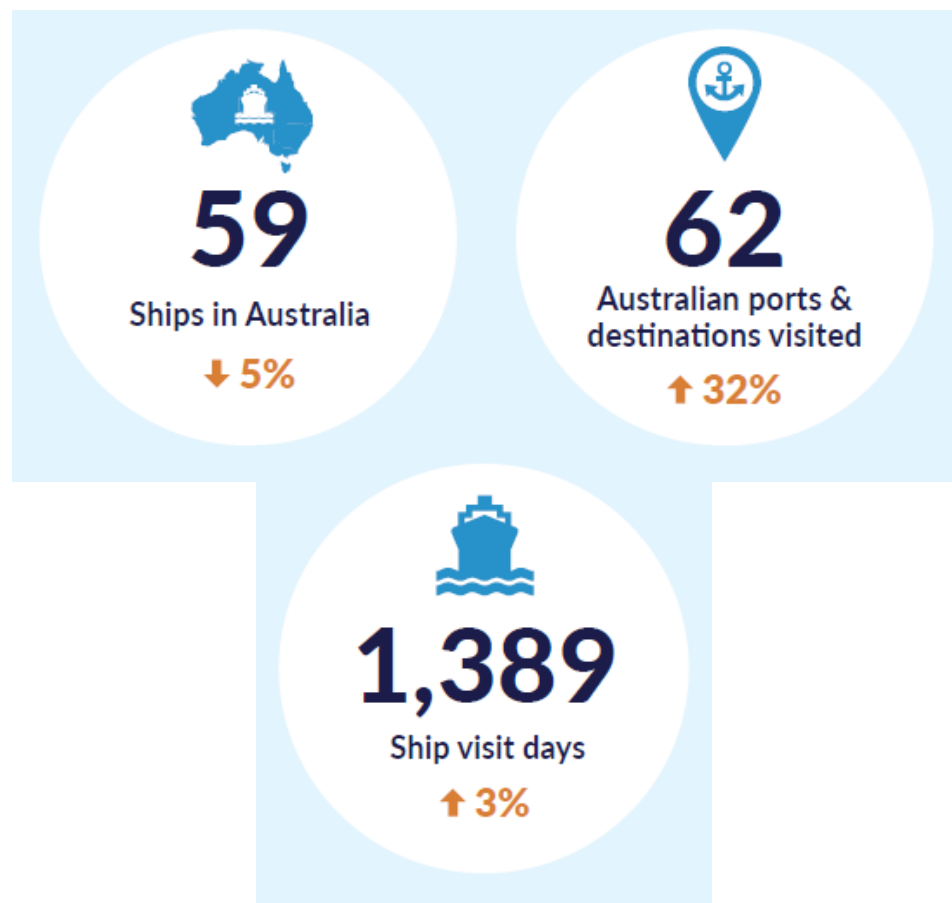


2022/2023 Australian Cruise Industry Economic Contribution

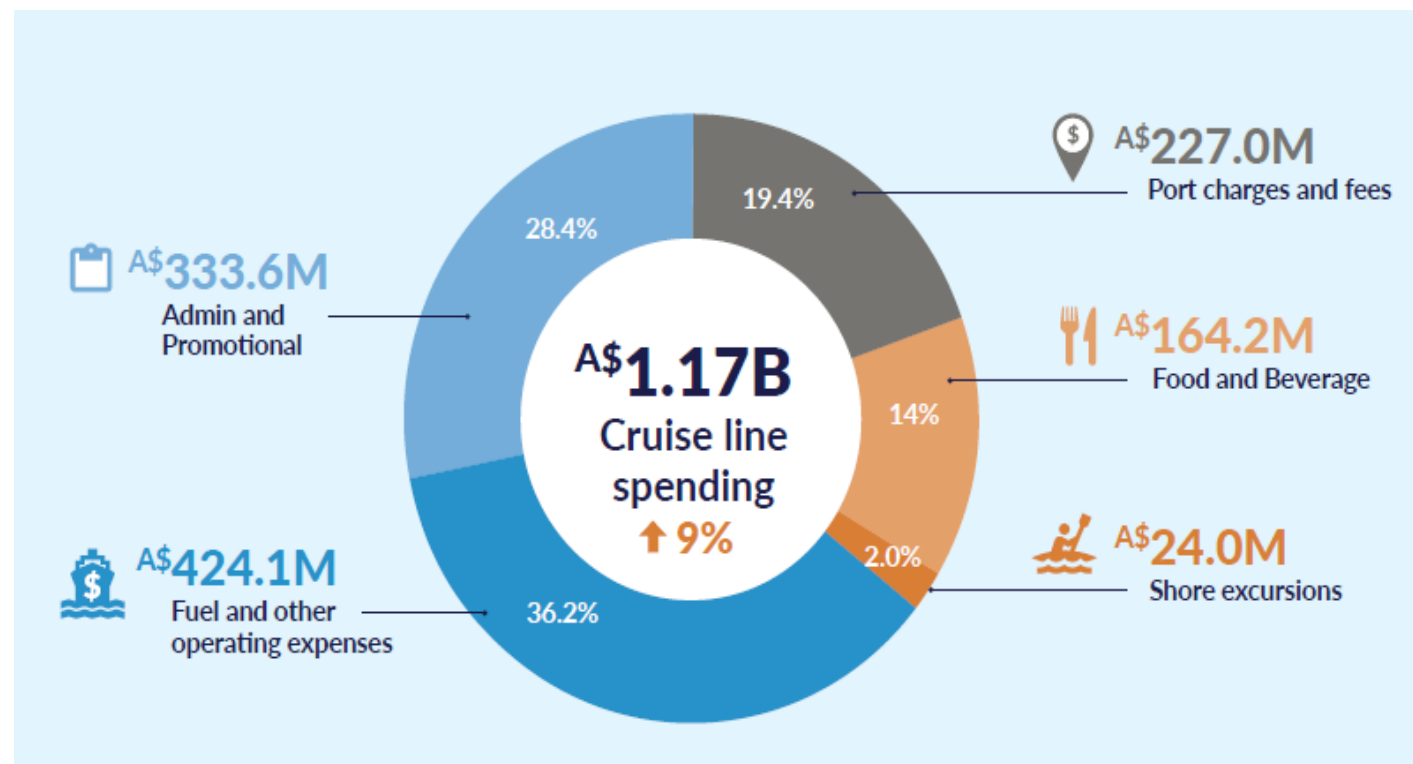


Source: Economic Impact Assessment of Cruise Tourism 2022/23, prepared by AEC Group Ltd

Cruise ship visits around Australia



Cruise line expenditure in Australia



Opportunities



- World class destinations, highly recognised by international travellers
- Diverse experience offerings throughout the region
- Safe environment
- Consideration for cruise is at a record high
- Predicting 39m passengers to cruise in 2026 (32m in 2023)
- New cruisers surpassing all predictions - average age 46; 36% under 40
- so well suited to our naturally adventurous outlook
- Balanced mix in global ship sizes: small, mid-range, 3,000+ pax

Opportunities



- 56 newbuilds to be launched by 2028
- 13 new ocean cruise ships recently entered the market
- 15 new ocean cruise ships to be launched by end of 2025
- 15 by end of 2026
- 10 by end of 2027
- More Viking ships, more Explora Journeys, more Royal Caribbean, more Carnival, more Norwegian Cruise Line (8 ships between 2026 and 2036)
- 4 new Disney Cruise Line ships launched by 2031

Challenges



- Geopolitical tensions
- Negative impacts of foreign exchange
- Rising fuel costs
- Slow return of China to travel
- Increasing costs and regulatory requirements
- Carbon intensity indicator (CII)
- Large region with relatively small populations
- Regional infrastructure



Key Political Advocacy



- Review of Coastal Trading Act - provide long term confidence for cruise lines operating year-round and visiting Australia
- ABF - seamless travel between Australia and New Zealand, greater workforce allocation to enable growth through more first/last ports of entry in regional ports
- Access Permits - address of the number and variety of permits around the country in order to streamline operations, not intended to undermine safety or environmental controls but to simplify and make consistent
- Infrastructure investments - continue to improve our facilities, invest in shore power where feasible and collaborate to deliver on alternate fuel sources
- Marketing support - greater investment for international marketing development and data collection by tourism bodies



Thank You