

# Welcome to the 10th Annual New Zealand Cruise Association Conference

Annie Dundas

Avinash Murthy

David Kriel

Debbie Summers

Kevin Winders

Oscar Nathan

Sean March

Tansy Tompkins

Paul Yeo

Rebecca Ingram

Tātaki Auckland Unlimited

Ports of Auckland

Napier Port

ID New Zealand

Port Otago

Tourism BOP

Te Puia

Wellington Cable Car

Tourism New Zealand

Tourism Industry Aotearoa

Chair	Tansy Tompkins
Deputy Chair	Debbie Summers
Treasurer	David Kriel

Largest and most positive season  
Increased regional spread  
Welcoming communities  
Managed cruise days across the country  
Strong Seatrade Miami contingent  
Positive port ratings and regional feedback



Timaru



Taranaki



New Zealand	2023/24	Actual
<b>Port calls</b>	1,119	<b>1,057</b>
<b>Guests</b>	360,000	<b>331,599</b>
<b>Crew</b>	149,000	<b>145,342</b>
<b>Vessels</b>	55	<b>55</b>





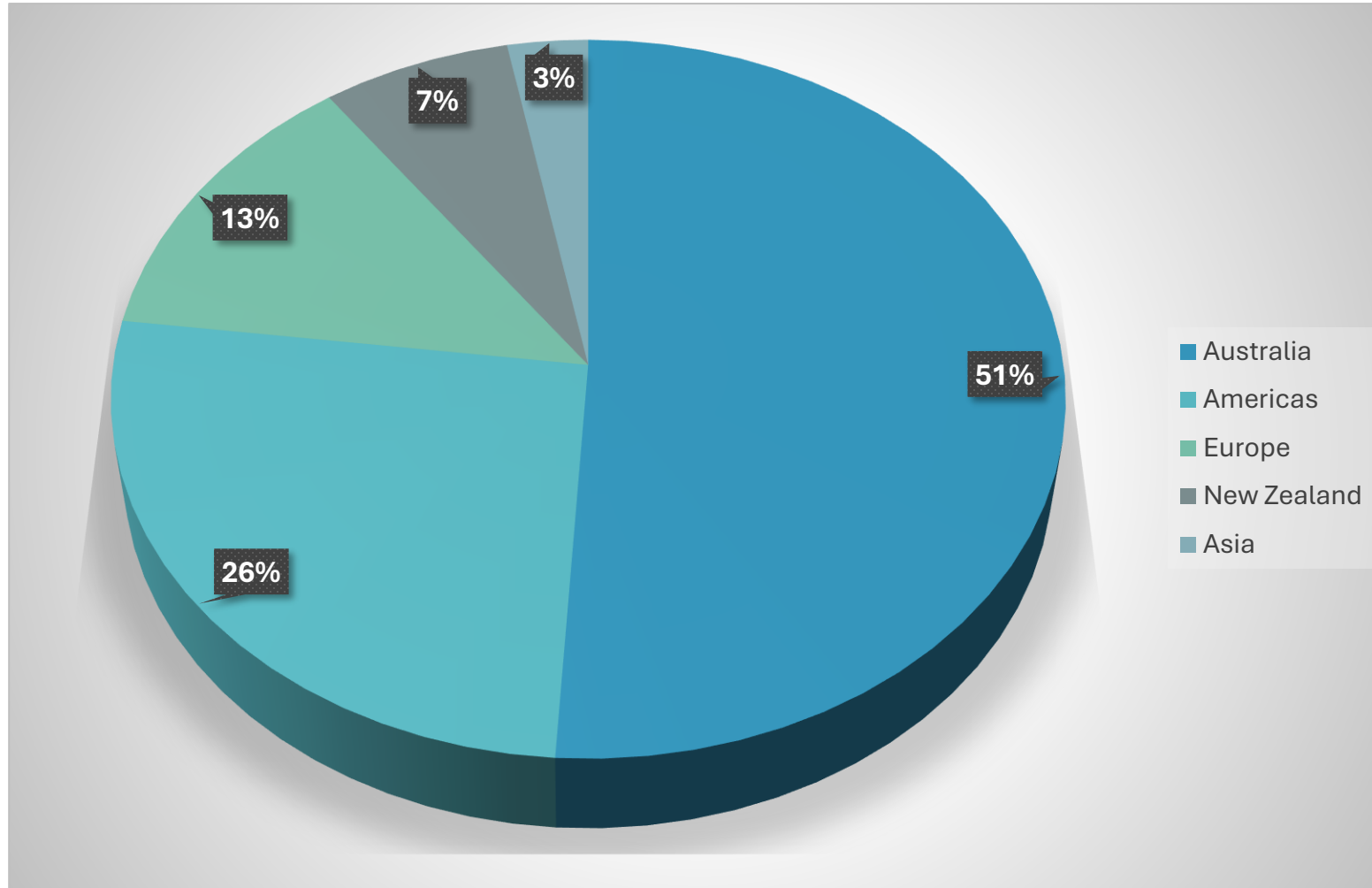
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Port calls by Vessel size	2023/24
2500 +	26%
1000-2500	25%
Under 1000	49%

	2023/2024
Holiday Arrivals YE June 2024	1,506,026
Cruise arrivals YE June 2024	331,599
Total Holiday Arrivals YE June 2024 (including Cruise Passengers)	1,837,625

Est 18% of New Zealand's holiday arrivals YE June 2023 came by a Cruise Ship



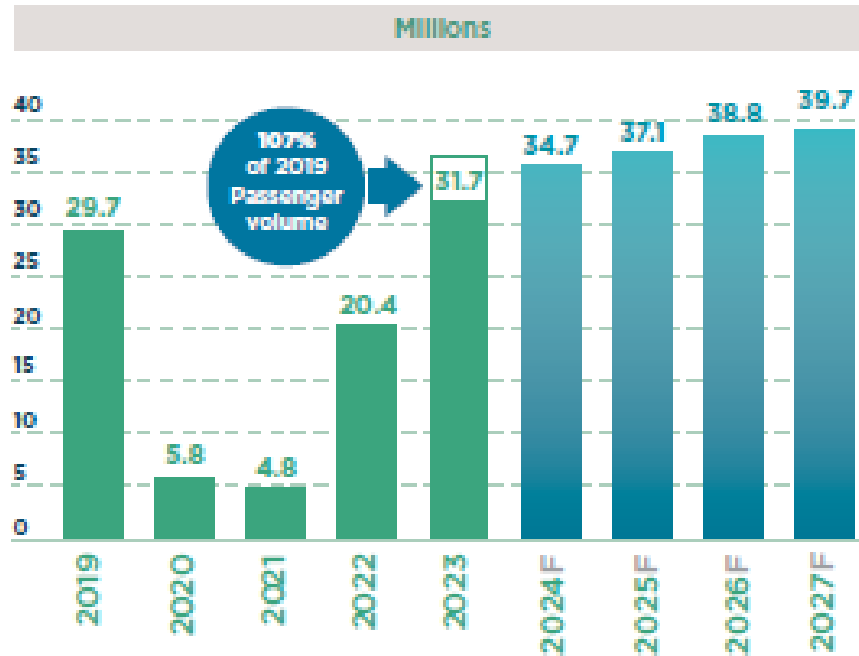


New Zealand	2023/24 Actual	2024/25
<b>Port calls</b>	1,057	<b>894*</b>
<b>Guests</b>	332k	<b>279k</b>
<b>Crew</b>	145k	<b>120k</b>
<b>Vessels</b>	55	<b>46</b>

Port calls by Vessel size	2023/24	2024/25
<b>2500 +</b>	26%	<b>29%</b>
<b>1000-2500</b>	25%	<b>16%</b>
<b>Under 1000</b>	49%	<b>55%</b>

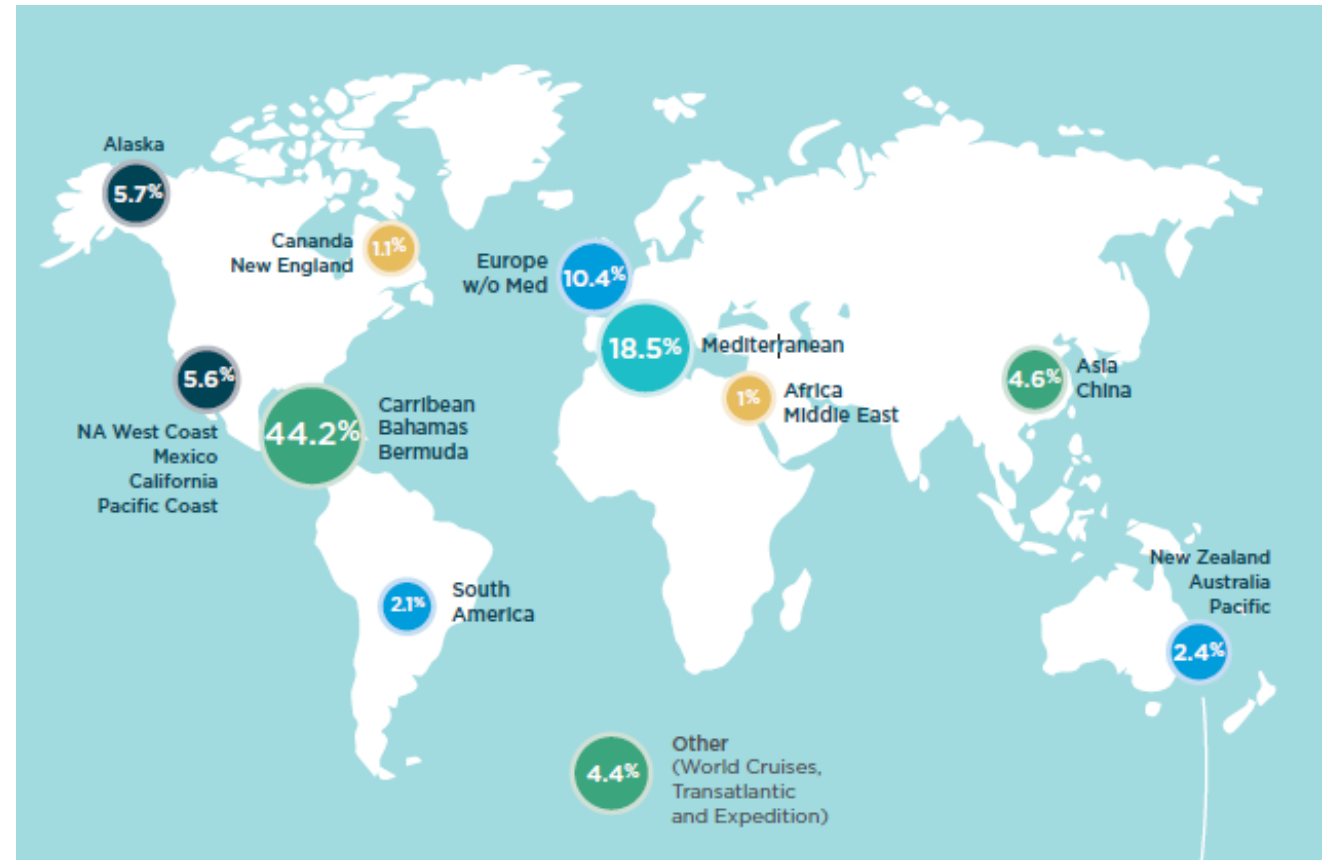
\*Including 17 winter cruising calls

	2018/19	2019/20	2022/23	2023/24	2024/25	% change
<b>Passengers</b>	322k	282k	251k	332k (360k forecast)	<b>279k</b>	<b>-15%</b> (-22% on forecast)
<b>Crew</b>	141k	131k	112k	145k (149k forecast)	<b>120k</b>	<b>-17%</b> (-19% on forecast)
<b>Vessels</b>	41	41	42	55	<b>46</b>	<b>-17%</b>
<b>Port Visits</b>	940	912	794	1056 (1,119 forecast)	<b>894</b>	<b>-15%</b> (-20% on forecast)



## Influencing Trends

- Younger demographic
- Multigenerational
- Accessible travel
- More immersive travel experiences



Cruise vessels account for less than 1% of the total marine ocean-going commercial fleet with just 322 ships operating worldwide

Market demand

Passenger and ShoreEx revenue

Port choices

Destination ratings and appeal to  
passengers

Competition for berth space

Cost of port + destination +  
regulations + fuel



# Cost Example Per Voyage

3000 Passengers - 110,000 Gross Weight Tonnage - 8 Ports + Fiordland

Organisation		Current	Proposed customs fees
<b>MPI and Customs</b>	Border Clearance Levy	\$80k	<b>\$115k</b>
<b>Maritime NZ</b>	Marine Safety Levy & Oil Levy per port	\$199k	\$199k
<b>Port Fees*</b> Does not include marine fees, gangplanks bunkering etc	Per Pax, GWT and earthquake insurance	\$290k	\$290k
<b>Fiordland – Marine Fee</b>	X GWT	\$45k	\$45k
	<b>Total per voyage</b>	<b>\$614k</b>	<b>\$649k*</b>

\* Additional \$35k per voyage







## Headwinds

Last winter cruising season  
Layers of increased fees and  
levy's  
Timing of increases  
Milford Opportunities  
Biofouling Risk  
Future Fuels  
Shore power infrastructure

## Tailwinds

A galvanised industry  
Partnership both within the sector and  
outside  
Strong national ratings  
MOU with Tourism New Zealand  
Minister of Tourism and  
Hospitality / Associate Minister of  
Transport  
Cruise National New Zealand 2040

# Cruise Aotearoa New Zealand 2040

SETTING A COURSE FOR THE FUTURE



# Cruise Aotearoa New Zealand 2040



## 2040 VISION

A visitor focused cruise sector that  
makes New Zealand a better place  
by contributing to, and growing the  
value of economy, environment  
and community.



# Cruise Aotearoa New Zealand 2040

## VESSEL JOURNEY

### Cruise Line Attraction

### Pre-Arrival in NZ

### In NZ Waters

### Redeployment

#### Deployment Secured

#### Securing Deployment

- Cruise Line
- Port Agent
- NZCA
- TNZ
- Ground Handler

Sales calls, Seatrade, in market meetings, familiarisations - long lead

#### Activate Promotion

- In source markets
- Cruise Line
- Travel Wholesaler
- Travel Agent/OTA
- Airlines
- TNZ
- Ground Handlers

ShoreEx and pre/post open for purchase when booking passage

#### Activate Operations

- National
  - Cruise Line
  - Port Agent (itinerary planning)
  - Port (bookings)
  - MPI
  - Customs/Immigration
  - MaritimeNZ
  - Harbour Master
  - NZ Health
  - Provedor
- Regional coordination groups step up consisting of:
  - RTOs
  - Port
  - Local government
  - isite
  - Business associations
  - Community groups

#### Activate ShoreEx

- Ground Handler – contract tourism product, and pre and port touring options
- Transport provider
- Shuttle Provider
- Cruise Line ShoreEx
- Port H&S

ShoreEx sold throughout voyage to NZ and each port

#### Day in Port

- Port
- RTO
- isite
- Local Government
- Waka Kotahi
- Ground handler
- Tour operators
- Transport providers
- Retailers and hospitality/F&B providers
- Accommodation providers
- Airport
- Provedor

#### Securing Deployment

- Redeployment to Australia or Nth Hemisphere for NZ winter.
- Return if season successful, and begin at 'Deployment Secured'
- Regular meetings, famils and sales calls required to maintain relationship

# Cruise Aotearoa New Zealand 2040

*Reducing impacts in climate,  
emissions, waste management,  
biodiversity and protecting nature.*

*Respecting and enabling positive,  
vibrant and welcoming communities  
with better social and cultural  
impacts.*



*Growing economic contribution  
that is balanced with environment,  
community and visitor.*

*Delivering outstanding, distinctive  
visitor experiences that are good for  
the economy, nature, communities  
and Māori.*

## 2040 ASPIRATIONAL GOALS



### Economy

- \$1 billion cruise expenditure contribution by 2040.



### Environment

- Net carbon zero tourism supply chain by 2040, and by 2050 for cruise lines.
- Zero waste to landfill by 2030 or as soon as possible before 2040.



### Community

- 90% of New Zealanders think cruise tourism is good for New Zealand.
- Cruise tourism is good for Māori and iwi.



### Visitor

- 90% of international cruise visitors satisfied with experience.
- 90% average NPS scores per region by cruise line.

# Cruise Aotearoa New Zealand 2040

## HORIZONS



## HORIZON 01 OBJECTIVES

Unlock Data and Measurement	Activate Communications	Engage Government Stakeholders	Build and Strengthen Partnerships	Integrate National and Regional Operations
<ul style="list-style-type: none"> <li>• Enable a cruise specific data and evidence base through partnership and integration</li> <li>• Measure contribution 'pillars' economy, environment, community and visitor</li> <li>• Make measurement widely available throughout the sector</li> </ul>	<ul style="list-style-type: none"> <li>• Develop a leadership position that builds a positive cruise narrative</li> <li>• Educate key stakeholders on the cruise ecosystem</li> <li>• Enable deeper understanding between destination and cruise lines</li> </ul>	<ul style="list-style-type: none"> <li>• Build government alignment with cruise strategy, vision and goals</li> <li>• Engage advocacy and support of key agencies</li> <li>• Develop awareness and trust throughout government system – national, regional, and local</li> </ul>	<ul style="list-style-type: none"> <li>• Develop national cruise partnerships at multiple levels of the system</li> <li>• Grow capability to accelerate progress towards our future</li> <li>• Mitigate vulnerability of New Zealand cruise sector to deployment variability</li> </ul>	<ul style="list-style-type: none"> <li>• Enable best practice operations and integration for consistency and regional relevance</li> <li>• Improve the standard, consistency and distinctiveness of visitor experience</li> <li>• Make ship visits better for communities.</li> </ul>



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