



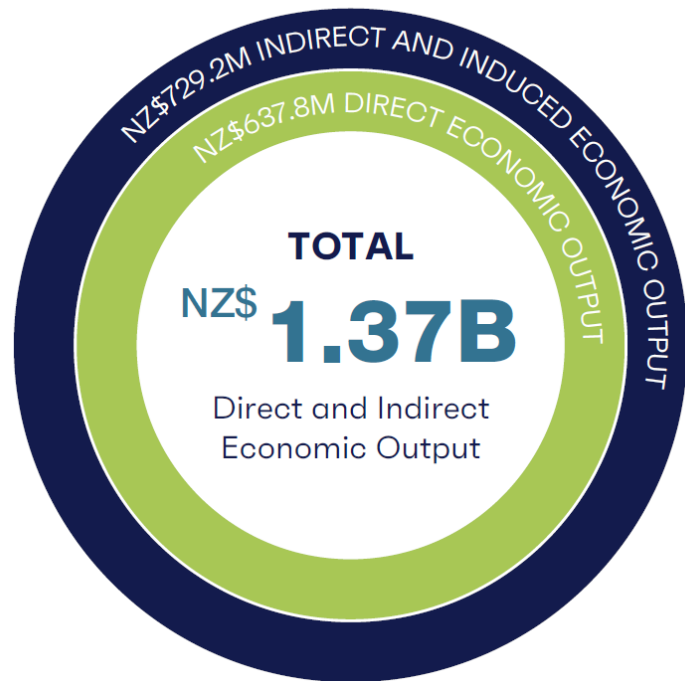
Welcome to the New Zealand Cruise Association Conference 2025

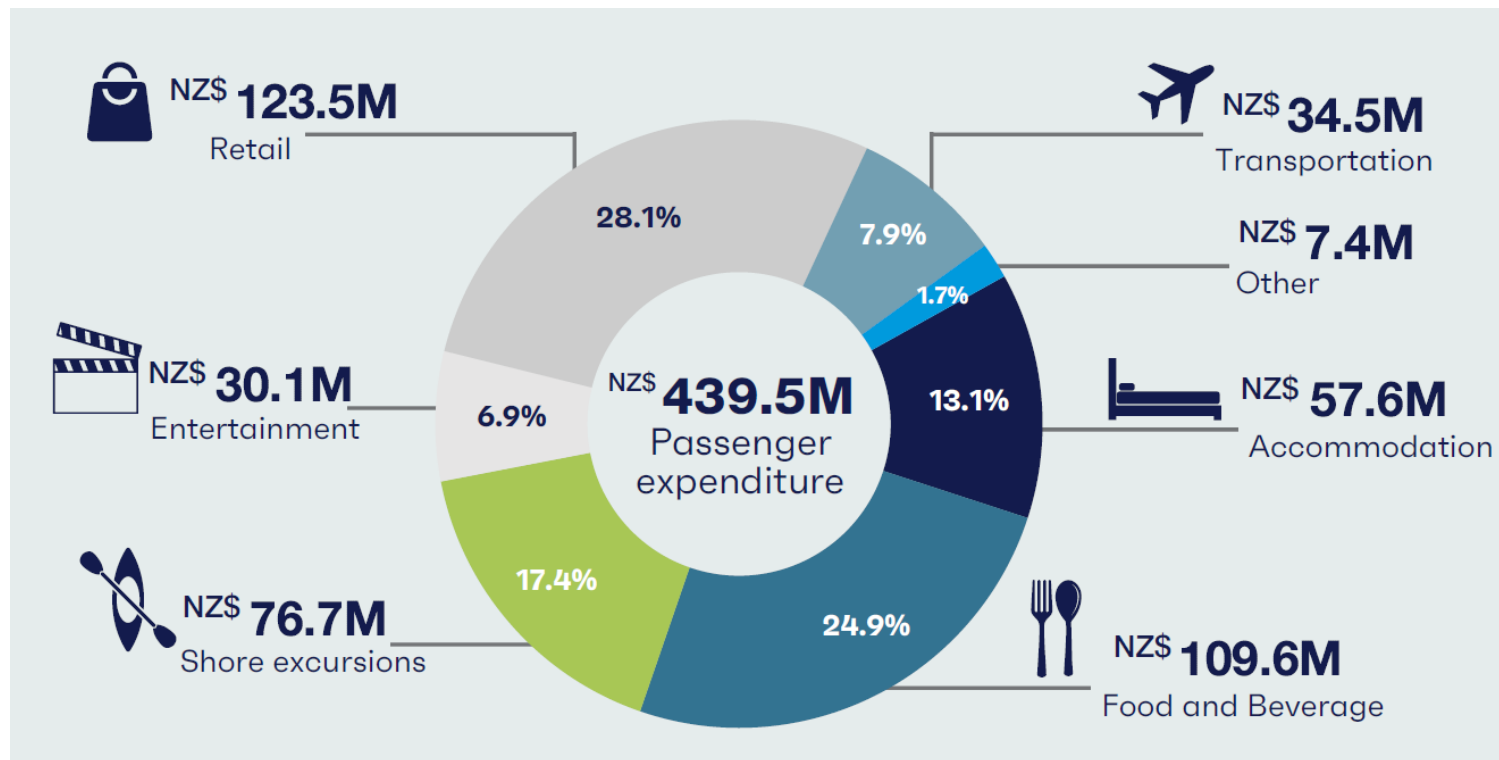
Jacqui Lloyd - CEO

NZCA Board announced at the AGM Yesterday

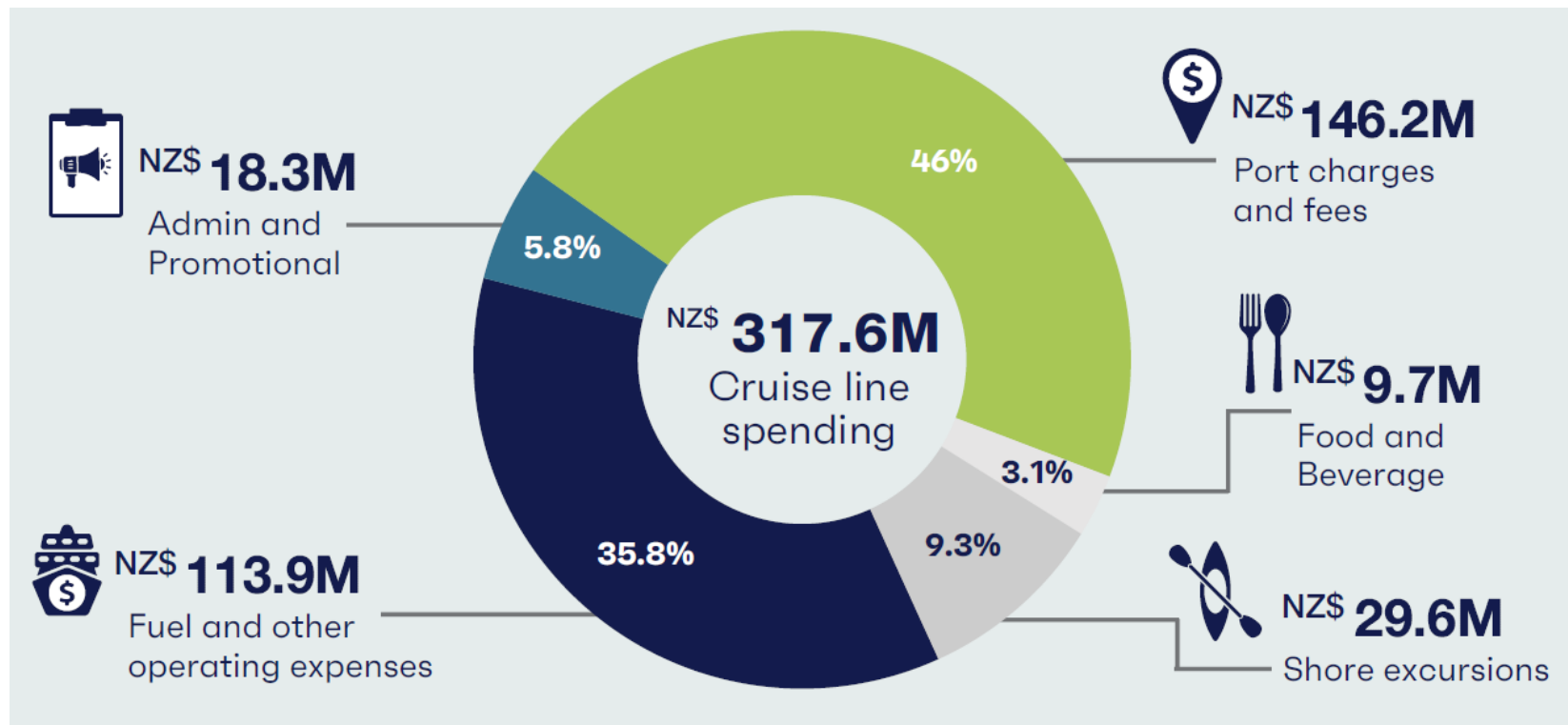
Avinash Murthy	Ports of Auckland
David Kriel	Napier Port
Debbie Summers	ID New Zealand (Deputy Chair)
Karen Thompson-Smith	Tātaki Auckland Unlimited
Oscar Nathan	Tourism Bay of Plenty
Richard Carvalho	ISS Shipping
Sean Marsh	Te Puia
Tansy Tompkins	Wellington Cable Car (Chair)
Jacqui Lloyd	CEO
Paul Yeo	Tourism New Zealand (Ex officio)
Rebecca Ingram	Tourism Industry Aotearoa (Ex officio)

Chair	Tansy Tompkins
Deputy Chair	Debbie Summers
Treasurer	David Kriel





NZCA - Value of Cruise Tourism 23/24



Average passenger spend per day: ^{NZ\$} 282.2

Turnaround Ports

Domestic pax	International pax
NZ\$ 707.1	NZ\$ 697.8

Transit Ports

Domestic pax	International pax
NZ\$ 214.6	NZ\$ 223.2

Crew expenditure in New Zealand

NZ\$ 23.5M

Total crew spend

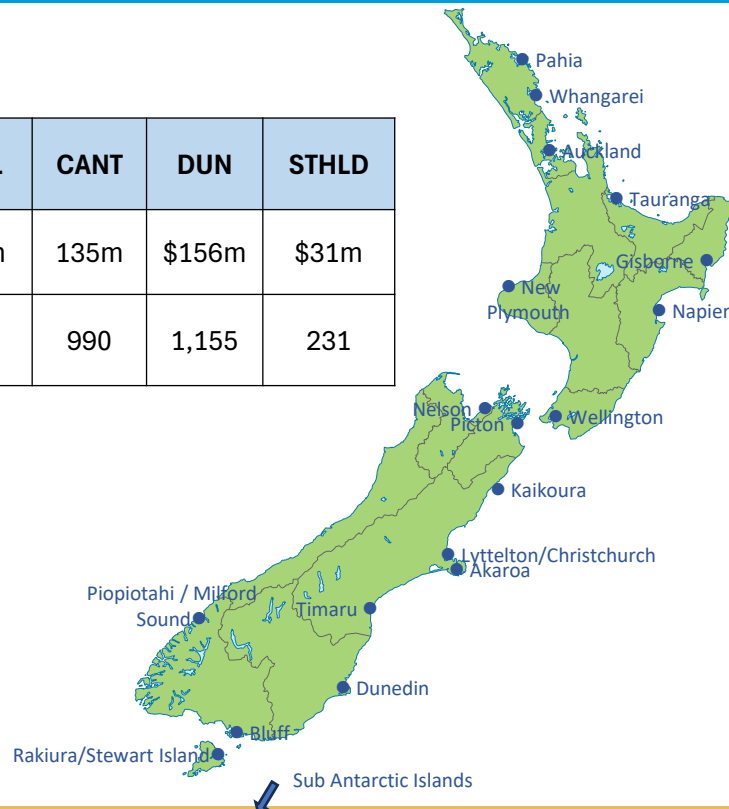
NZ\$ 73.9

Crew member average
spend per day

Cruise Matters – To Regions and the Economy

Direct / Indirect	NTHLD	AKL	BOP	GIS	HB	NP	WELL	MLB	NEL	CANT	DUN	STHLD
Total Output	\$68m	\$604m	\$112m	\$5m	\$89m	\$2m	\$100m	\$60m	\$2m	135m	\$156m	\$31m
People Employed	457	4,181	784	34	657	15	758	452	15	990	1,155	231

- Cruise supports regional jobs, spending, and local businesses
- Towns and cities already feeling the pinch
- Real concerns about loss of IP

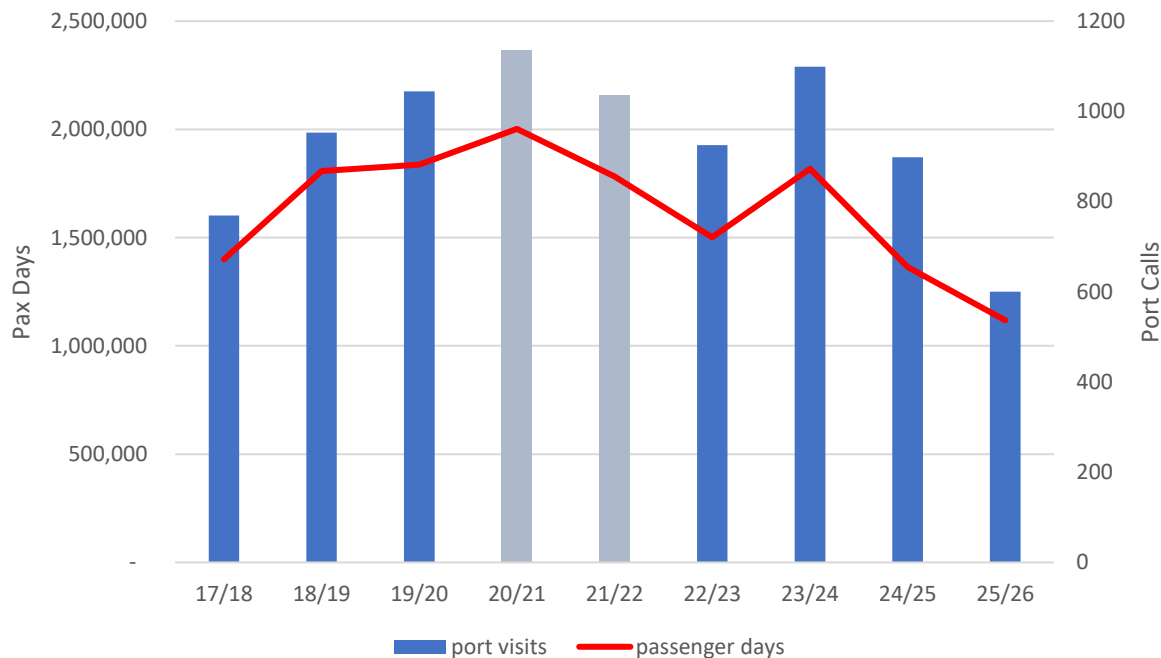


15 August 2025 – This is Not a Drill

New Zealand Booking Trends

Booked	2023/24	2024/25	% drop from 23/24 TO 24/25	2025/26	% drop from 24/25 TO 25/26	Total drop from 23/24 (Best Season) to 25/26 forecast	Total % drop from 23/24 (Best Season) to 25/26 forecast
Port Calls	1,120	915	-18%	663	-28%	457 fewer port calls	-41%
Unique Guest Capacity	360,000	281,000	-22%	216,775	-23%	143,000 fewer guests	-40%
Crew	149,000	120,000	-19%	92,935	-23%	56,000 fewer crew	-38%
Passenger Days	1,818,503	1,366,640	-25%	1,127,824	-17%	690,679 fewer pax days	-38%
Vessels	55	46	-16%	39	-15%	16 fewer vessels	-29%
Voyages	207	165	-20%	127	-23%	80 fewer voyages	-39%

NZ Booked Port Calls and Passenger Day Capacity



18% drop in port calls in 2024/25

28% drop forecasted for 2025/26

Over 40% decline in bookings since 2023/24

Impact already felt across regional economies

The Why's

- **Biofouling risk** – Despite compliance, regulations make it impossible for lines to confidently predict a ship will be allowed to enter New Zealand. The brand risk and operational cost is unacceptable to many lines.
- **Uncertainty** – New regulations and costs being introduced inside the booking window (18–24 months) create unmanageable planning and budgeting risks.
- **Costs** – New Zealand is now among the most expensive places in the world for a cruise ship to visit.
- **Perception** – At the executive level, New Zealand is seen as difficult to work with, unwelcoming, and unpredictable.

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The Risk – 27/28 planning, tipping point, operators can't sustain losses
This is Not a Drill

Focus on advocacy and collaboration

- Cruise Aotearoa New Zealand 2040
- Whole of government approach
- Tourism Growth Roadmap
- Data and Research
- Milford Decision
- Perception

HORIZONS

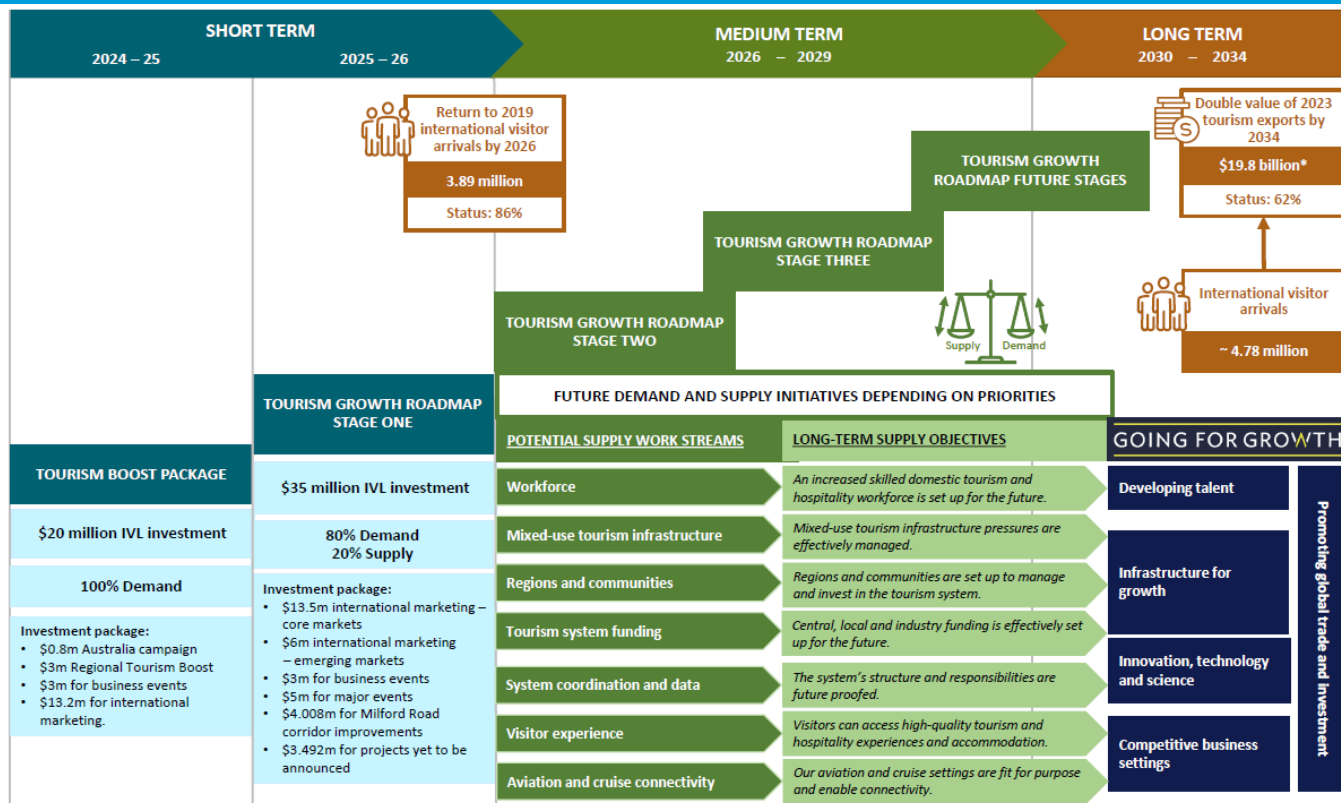


HORIZON 01 OBJECTIVES

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



Tourism Growth Roadmap



2023/24

The Value of Cruise Tourism

The inaugural New Zealand Cruise Industry Economic Impact Analysis for 2023-24 provides new and comprehensive insight into the national cruise economy, revealing the full value of cruise tourism to communities throughout the country.



2023/2024 New Zealand Cruise Industry Economic Contribution



The 2023-24 financial year brought \$1.37 billion in total economic output created by cruise tourism in New Zealand, supporting employment totaling 9,729 jobs and \$425.9 million in wages for New Zealand workers.



New Zealand Cruise Impact Research

Prepared for: Ministry of Business, Innovation and Employment

December 2024

m.e
consulting





- Advocacy** Drive a stable, transparent regulatory environment for smooth, predictable cruise operations.
- Promotion** Showcase NZ on the world stage, from Seatrade Miami to Hamburg, and engage directly with cruise lines.
- Partnership** Unite central and local government, tourism bodies, ports, airlines, and members for coordinated cruise recovery and growth.
- Strategy** Refresh Cruise Aotearoa NZ 2040 to stay relevant and responsive to today's challenges.

There is genuine opportunity for growth from the 2027/28 season onward

And we need your help

- Keep talking about why cruise matters to you, your business, your region.
- Educate decision-makers in your communities and regions.
- Push for clarity, stability, and smart regulation.
- Support the cross-government approach to cruise policy.

Thank you to New Platinum members



