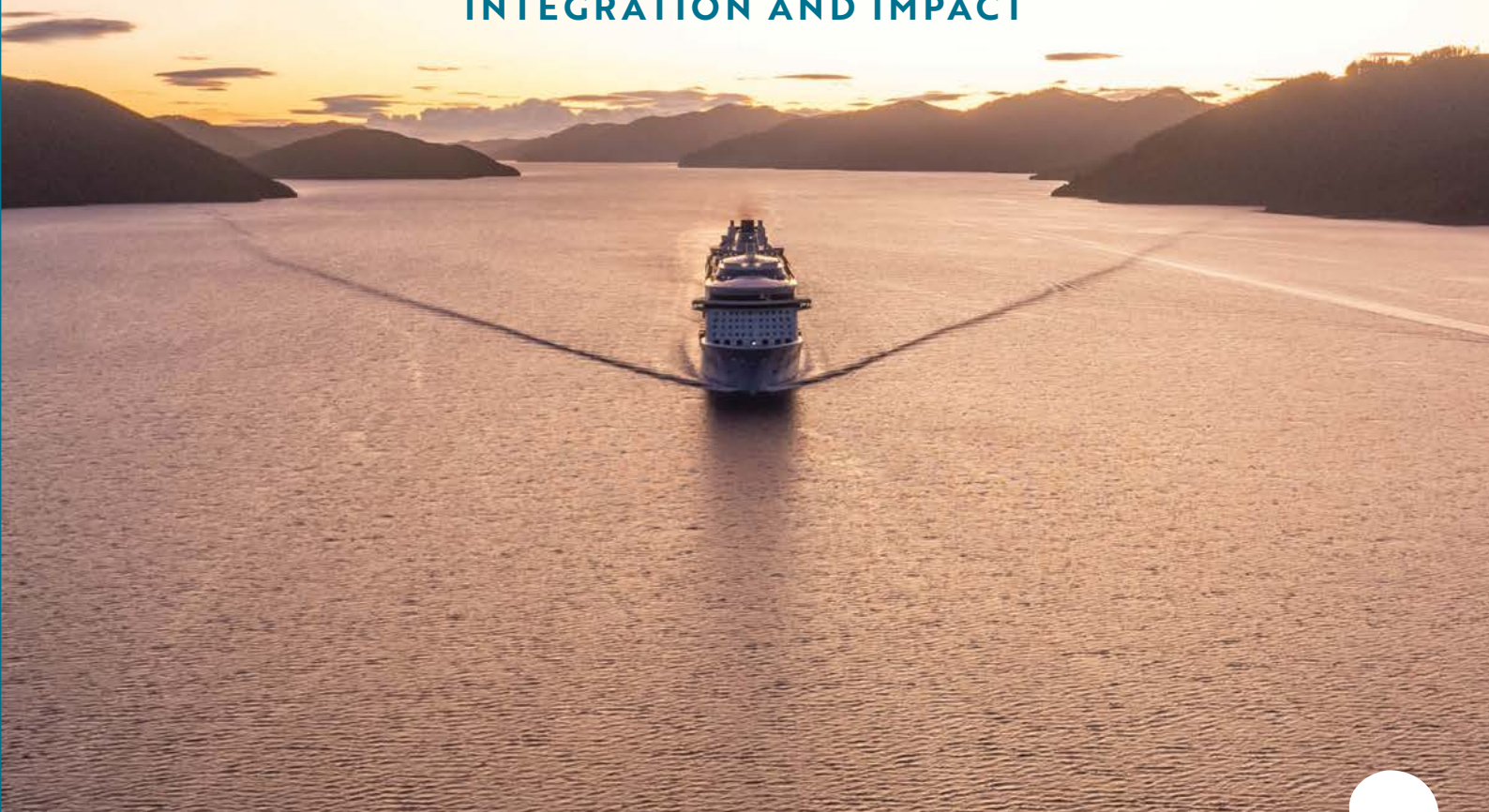


CRUISE AOTEAROA NEW ZEALAND 2040

HORIZON TWO
STRATEGY TRANSITION

INTEGRATION AND IMPACT





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.



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New Zealand cruise visitation is down 40% in a globally growing sector, with a further drop forecast for 2026/27... this is our critical window to reverse the decline and secure NZ's cruise future.



Bay of Plenty



1.0 EXECUTIVE SUMMARY

New Zealand cruise visitation is down 40% in a globally growing sector, with a further drop forecast for 2026/27. With scheduling locked in for 2027/28, deployment decisions for 2028/29 are being made now. This is our critical window to reverse the decline and secure NZ's cruise future.

From Alignment to Action

Horizon 1 built the foundation including government commitment, port alignment, and industry partnerships. Horizon 2 requires integration and impact through tangible action that rebuilds our reputation with cruise lines and enables confident deployment decisions.

Stakeholder engagement revealed what must change: government leadership must be embedded in agency systems; all stakeholders must prioritise collective deployment enablement over individual goals; cruise lines must be treated as strategic partners; data must be integrated into tourism statistics; and costs and regulations must be coordinated and simplified.

Right Value, Right Ship, Right Place, Right Time

Horizon 2's guiding mantra recognises we must proactively deliver value before we receive it:

- Right value to cruise lines as strategic partners
- Right value to passengers through distinctive New Zealand experiences
- Right value for communities ensuring social licence and meaningful contribution

Horizon 2 Priorities

We will deliver value through five integrated priorities:

- 1. Measure & Demonstrate Value**
Integrated measurement systems informing decisions and strengthening advocacy
- 2. Champion Government Leadership & Continuity**
Embed priorities in government systems and build bipartisan support
- 3. Advance Partnership & Customer Focus**
Transform relationships into strategic partnerships through service excellence
- 4. Strengthen Collaboration & System Integration**
Unified national narrative with coordinated stakeholder systems
- 5. Develop Competitive Operational Excellence**
Address infrastructure gaps, cost barriers, and build world-class capability.

Progressive Build

With deployment enablement as the organising principle horizon 2 evolves from urgent deployment enablement (2026) through sustained delivery with capability development (2027/28) to world-class operations as business-as-usual (2029/30), positioning New Zealand as a consistent, trusted partner.

Shared Responsibility, Shared Benefit

The New Zealand Cruise Association (NZCA) Board stewards this strategy while cruise sector stakeholders share responsibility for delivery. Government coordination creates enabling policy and regulatory conditions. Progress and performance will be monitored and reviewed regularly.

Without decisive action now, we risk structural decline. Unprecedented momentum exists including ministerial leadership, cross-agency coordination, port alignment and reputational improvement with cruise lines. Now we must work together and deliver tangible action to ensure a world-class cruise sector that delivers long term economic benefits for tourism and across New Zealand.



HORIZON
02 | Integration
& Impact

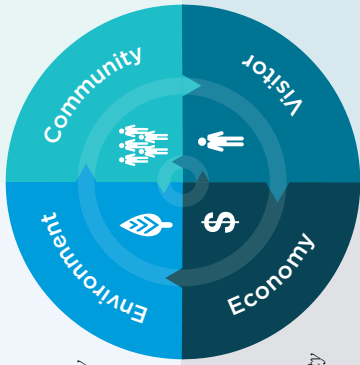
CRUISE AOTEAROA NEW ZEALAND 2040 | HORIZON 02: INTEGRATION & IMPACT

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.

CONTRIBUTIONS

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 zero carbon by 2040 or as soon as possible before 2050.
- 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.

HORIZONS

HORIZON **01** Alignment to Momentum 2023 → 2025

HORIZON **02** Integration & Impact 2026 → 2030

HORIZON **03** Evolution & Contribution 2030 → 2040

H2 PRIORITIES	Measure & Demonstrate Value	Champion Government Leadership & Continuity	Advance Partnership & Customer Focus	Strengthen Collaboration & System Integration	Develop Competitive Operational Excellence
H2 OUTCOMES	<ul style="list-style-type: none"> • Evidence-based policy and decision making • Aligned target setting and performance monitoring • Evidence based advocacy 	<ul style="list-style-type: none"> • Government Stakeholders enabled as cruise leaders and advocates • Bipartisan political support established • Coordinated cross-agency action delivers results 	<ul style="list-style-type: none"> • Cruise industry partnership mechanisms established • Long-term customer-focus enabled • Port-led service excellence operational 	<ul style="list-style-type: none"> • Unified deployment narrative embedded • National-regional coordination systems established • Regional operational excellence enabled 	<ul style="list-style-type: none"> • Critical infrastructure and immediate barriers resolved • Transparent and competitive operating frameworks established • Future-ready world-class capability underway

All priorities, outcomes and phasing on this slide relate to Horizon 2 | The five priorities below are concurrent and continuous not sequential

H2 PHASING

Phases apply across all five priorities

2026

URGENT DEPLOYMENT ENABLEMENT

2027/28

SUSTAINED DEPLOYMENT; CAPABILITY DEVELOPMENT

2029/30

DEPLOYMENT CONFIDENCE THROUGH CAPABILITY





Waiāhori / Picton

2.0 MAKING THE TRANSITION

2.1 | Why This Document, Why Now?

When we launched Cruise Aotearoa New Zealand 2040 (the NZCA-led strategy for NZ's cruise sector) in 2023, we built in planned review points recognising the need for periodic recalibration. That first review point is now.

But this isn't simply a scheduled checkpoint. The context we're navigating has intensified strategic focus *and* urgency. NZ has seen a 40% decline in cruise visitation, with a further reduction forecast for the 2026/27 season, an anomaly in a globally growing sector. With cruise scheduling largely locked in through to 27/28, and deployment decisions for 2028/29 in play, we must act now with intent.

Significant momentum has been achieved. Government commitment is at unprecedented levels through ministerial leadership and cross-agency coordination. Tourism New Zealand is also more engaged with the sector and there is growing nationwide port alignment. The foundation built through Horizon 1 (2023 to 2025) has created the conditions for more integrated action. This dual reality, downturn urgency and integrated momentum, sharpens our focus for Horizon 2 (2026 to 2030). We cannot afford to lose the next deployment window. We cannot afford to squander the momentum achieved.

If we don't act with clarity now to secure deployment for the next 3 to 5 years we risk the future success of the industry.

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2.2 | How This Builds on Our Strategy

The strategic framework established in 2023 remains sound. Our vision of a visitor-focused cruise sector that makes New Zealand a better place remains our North Star. Our principles - drive for value, partner to empower, continuous improvement - still guide how we work. Our four contribution pillars and 2040 aspirational goals provide enduring direction. This document clarifies how we execute it in our current context.

The original strategy sets our course to 2040. This transition document adjusts our navigation for the waters we're sailing through in the next 5 years by recalibrating our approach while maintaining our destination. It's a refocus of emphasis, not a change in direction.

2.3 | From H1 Alignment & Momentum to H2 Integration & Impact

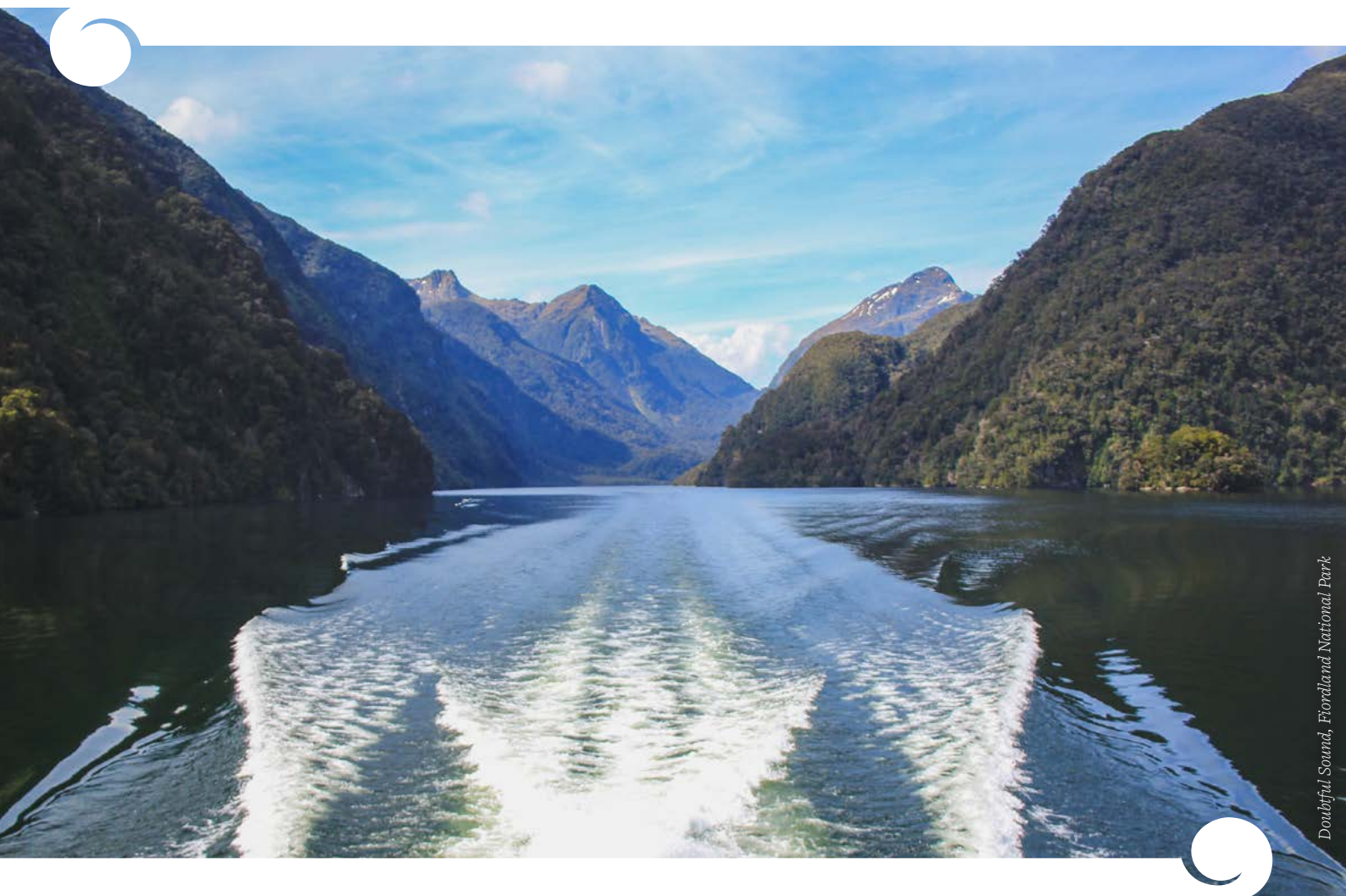
Horizon 1 was foundational. We needed stakeholder alignment, government engagement, partnership building, communication flow, data conversations and ecosystem understanding — and we've achieved significant progress.

Horizon 2 must be operational. The shift is from “getting people on board” to “delivering together.” From establishing relationships to generating results. From building understanding to proving value through measurable outcomes. Integration means stakeholders working in coordinated ways that create system-level change. Impact means we can demonstrate progress.

Some foundational elements still need completion while we simultaneously advance H2 priorities. The first 12-24 months of Horizon 2 will require continuing to build foundational capability and alignment in some areas while driving integrated action and measurable results in others.

The current context demands this pragmatic approach. We must secure deployment confidence through tangible action now—rebuilding our reputation, solving operational challenges, demonstrating value—while developing the integrated mechanisms that will sustain long-term success.

This transition document provides that roadmap: where to focus, what to prioritise, how to sequence actions, who must act, and how we'll measure success across the 2026-2030 period.



Doubtful Sound, Fiordland National Park

3.0 HORIZON 1 PROGRESS

3.1 | Where Are We Now?

Horizon 1 set out to build alignment and momentum. Two years in, we’ve achieved significant progress navigating complex challenges that required more sustained effort than anticipated.

The foundation is substantially in place. Government commitment has shifted from uncertainty to active engagement. Tourism New Zealand is increasingly elevating cruise within its broader work, reflecting the sector’s growing importance to regional dispersal, visitor spend, and destination development. Cross-agency coordination is functioning. Ports are increasingly aligned. Industry partnerships have matured into collaborative relationships.

But the foundational work is not finished. We’ve moved positively in building commitment, but slower than needed in delivering operational changes that will secure deployment decisions. Some priorities advanced strongly, others revealed the complexity of the system, depth of change required and resource limitations of NZCA especially in the face of a dramatic downturn and competitive environment.

3.2 | Progress Against Priorities

LEGEND	Color	Status	Description
	Green	On Track	Delivery advancing, results emerging, outcomes on course
	Yellow	In Progress	Work underway, implementation progress, still forming & refining
	Orange	Under Review	Action being reassessed, refined or awaiting input

PRIORITY	KEY ACTION AREA	STATUS	COMMENT	
1	Unlock Data and Measurement	Cruise industry measurement	On Track	National annual economic report established with CLIA/NZCA
		Integration into tourism data system	In Progress	MBIE influencing integration; IVS inclusion; project budget assigned
		Data & measurement tools	Under Review	Potential project; need data integration & robustness first
2	Activate Communications	Communication strategy	In Progress	Resource & PR support approved; actively delivering; plan evolving
		Ongoing education programme	Under Review	Currently delivered reactively; tools to be scoped & developed
		Stakeholder workshops – regions & cruise lines	In Progress	Delivered on request by region as and when available
3	Engage Government Stakeholders	Strong voice in government	On Track	Ministers engaged; government support; China Mission inclusion
		Network of government agencies	On Track	Agency relationships established; MBIE influencing; work continues
		Engagement of local & regional government	On Track	Engaging RTOs; presented to Mayors/Chairs; ports responding
4	Build and Strengthen Partnerships	Partnerships with CLIA & cruise lines	On Track	CLIA partnership strong; cruise lines engaged-SeaTrade & beyond
		Regional alliance with Australia/ Oceania	In Progress	MOUs established; more collaboration required
		Tourism system partnerships	In Progress	TIA aligned; TNZ committed; others in development
5	Integrate National & Regional Operations	National guidelines & processes	In Progress	Some momentum; activity clarification & refinement required
		Consistency of regional operations	Under Review	Framework required for regional action

3.3 | What Still Needs Work?

While significant progress has been made, foundational work from Horizon 1 remains incomplete. These elements must be completed in the first 12-24 months of Horizon 2 as they underpin the integration and impact work ahead:

- **Data and measurement infrastructure** - Finalising comprehensive measurement tools, resolving tourism data system integration challenges, and establishing robust regional reporting capability.
- **Education programme systematisation** - Moving from reactive workshop delivery to systematic education tools that build consistent stakeholder understanding.
- **National operational guidelines** - Completing clarification and refinement of processes required to enable consistency across regions.
- **Regional operations framework** - Establishing the differentiated support model that recognises variable regional capacity and readiness.
- **Trans-Tasman collaboration activation** - Moving from MOUs to operational coordination that supports regional deployment.

These completion priorities represent the foundational “still building” work that sits alongside the operational “now delivering” focus of Horizon 2.

This transition document provides that roadmap: where to focus, what to prioritise, how to sequence actions, who must act, and how we'll measure success across the 2026-2030 period.



Wellington | © David Jensen

Mount Maunganui, Bruce Bay, Tairāwhiti

New Zealand has taken cruise for granted. We've assumed our appeal would guarantee visitation without developing the sophistication of a true cruise destination.



4.0 REFOCUSING OUR COURSE

New Zealand has taken cruise for granted. We've assumed our appeal would guarantee visitation without developing the sophistication of a true cruise destination. A shallow grasp across stakeholders of industry dynamics and the global competitive context has left us exposed. While other competitor destinations such as Japan, Singapore, and Korea actively court cruise lines and deliver strong returns, New Zealand's share has slipped in an expanding global market.

Now the value of cruise has become unmistakable. The downturn has struck hard for ports looking for diversified revenues, ITOs with significant commitment to cruise, regions and operators who need cruise for vibrancy, viability and value delivery. Missing cruise arrivals also weakens tourism's broader ecosystem from hotels and airline seats to wider investment confidence. Recognised as a sector of scale and a key contributor to Tourism Growth Roadmap goals, cruise demands renewed commitment and collective focus.

Passenger demand for New Zealand remains strong, arguably a significant competitive advantage. But we can only leverage that demand if we first enable cruise lines to confidently make the decision to deploy ships here by getting our settings right to enable strong value delivery.

Reversing New Zealand's cruise downturn and securing its future success is fundamentally about enabling positive cruise line deployment decisions.

Reversing New Zealand's cruise downturn and securing its future success is fundamentally about enabling positive cruise line deployment decisions.

4.1 | Insight Themes

Five themes emerging from what we have learned shaping how we can enable a new future for cruise:

1

Government leadership and continuity

Current ministerial engagement represents a breakthrough in government understanding that has been lacking. The industry is impressed by this new momentum. However, implementation gaps remain, and agency coordination is a key challenge to overcome. New Zealand needs consistent, credible government leadership delivering (and inspiring) a strong and consistent narrative with urgent follow through and evidence of actions implemented and regularly reinforced. Commitments need to be embedded in agency systems to survive electoral cycles and provide cruise lines with confidence that there will be stable and consistent operating conditions into the future.

2

Collaborative stakeholders and system integration

All New Zealand stakeholders must approach cruise from a collective 'first enable deployment to NZ' mindset based on a one-destination approach rather than solely focusing on individual organisational goals. Without deployment growth all stakeholders will be disadvantaged. With deployment growth there are long-term benefits for all. This will require fundamental shifts in how ports, councils, agencies, and tourism organisations approach cruise activities.

3

Cruise lines as customer and partnership approach

New Zealand must shift from treating cruise lines as convenient revenue generators who will 'always come' to a more sophisticated customer relationship management approach. This requires a focus on rebuilding trust through clarity, consistency and confidence in an overarching genuine partnership approach. We need to recognise mutual value creation begins with providing value first.

4

Data integration and evidence-based advocacy

Cruise sector invisibility in official tourism statistics undermines advocacy, resource allocation, and strategic recognition across all stakeholder levels. Systematic data sharing with cruise lines and integration into official tourism statistics is essential for evidence-based policy making, regional decision making, stakeholder advocacy, and performance measurement relative to global growth.

5

Cost coordination and regulatory simplification

New Zealand's fragmented approach to cruise costs and regulations creates an unattractive, marginal operating environment for cruise lines and is at the heart of deployment challenges. Addressing these fundamentals requires a coordinated cross-agency government-led approach, in addition to port consistency, with forward pricing visibility and simplified administrative processes.

These themes are interconnected and mutually reinforcing. Government leadership and continuity enable policy delivery and resource allocation, which enables system integration and inspires collaboration, which demonstrates commitment to provide value to cruise lines, which increases willingness for partnership and data sharing, which enables evidence-based advocacy that justifies cost coordination and regulatory reform. This builds trust, reputation and confidence. Success requires coordinated action across all themes with deployment enablement as the organising goal.



Auckland | Courtesy of Port of Auckland



4.2 | Imperative for Urgent, Coordinated Action

Recently we've made significant progress in the right direction. Now urgent follow-through with tangible action is required to deliver change in policy and settings, and provide clarity and consistency based on three factors:

Timing

Deployment decisions for the 2028/29 season are being made now. Scheduling is largely locked through 27/28, meaning the next genuine deployment window, our opportunity to reverse the decline, is in focus. If we miss this window, we face another cycle of suppressed visitation.

Risk

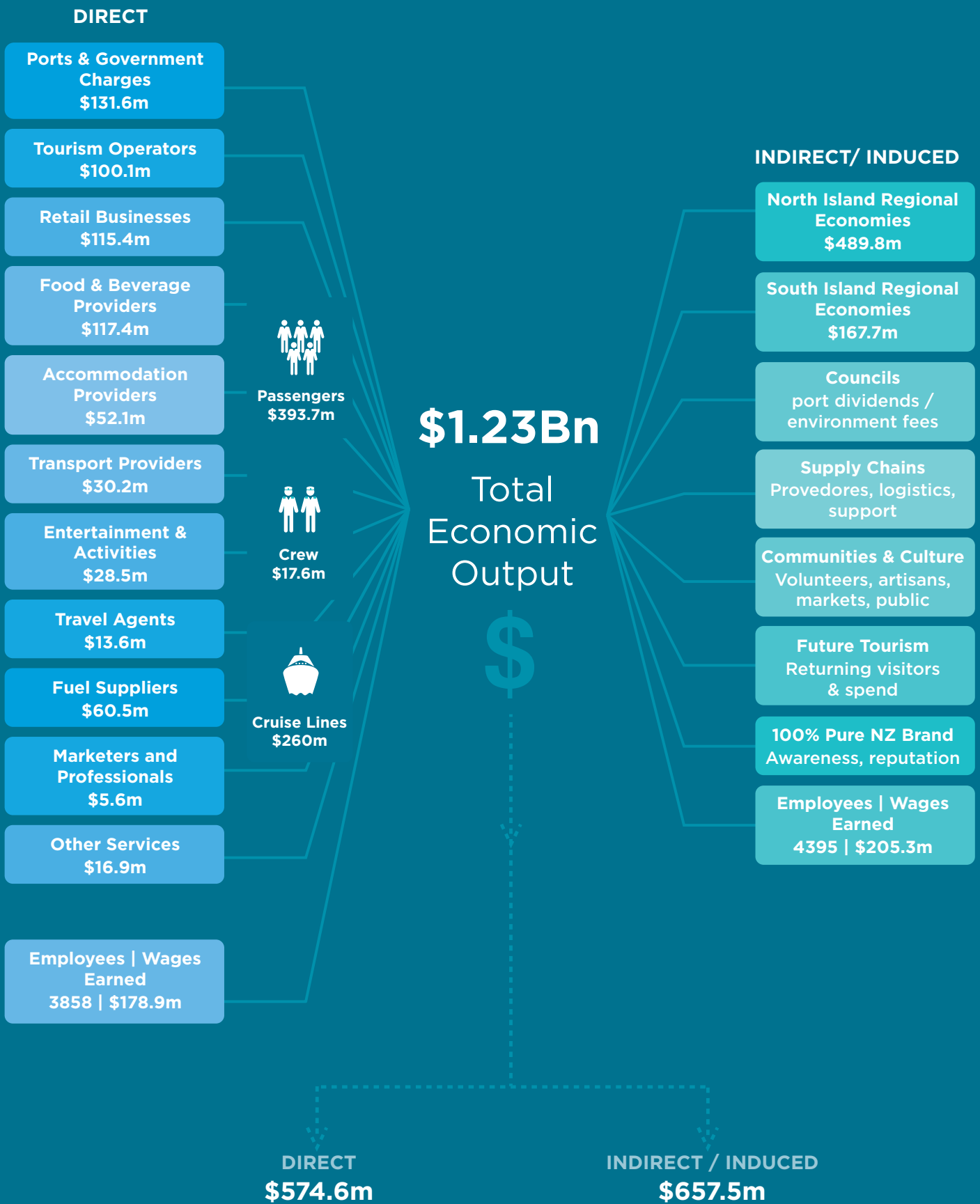
Without decisive action to secure deployment for the next 3-5 years, we risk permanent structural decline including potential loss of airline capacity, accommodation investment, operator viability, port diversification, retail and hospitality profitability, and regional economic contribution. The beneficiaries, support services and infrastructure that make cruise viable erodes without ship arrivals. From 23/24 to 24/25 we have already seen total economic output decrease from \$1.37bn to \$1.23bn.

Opportunity

We've achieved unprecedented momentum: ministerial leadership, cross-agency coordination, port alignment, improving trust with cruise lines. This momentum is fragile and requires tangible delivery to sustain and capitalise on to enable a more robust future.

In Horizon 2 every priority, action and stakeholder contribution must be evaluated against the question: **Does this enable cruise lines to confidently deploy ships to New Zealand?** This doesn't mean abandoning our four contribution pillars or long-term goals, it means recognising that without deployment, we have no sector to make sustainable. The urgent and the important must work together.

New Zealand Cruise Ecosystem Beneficiaries & Value at Risk



Source: The Value of Cruise Tourism, Economic Impact Assessment of Cruise tourism in New Zealand 2024-25: CLIA | NZCA



4.3 | Right Value, Right Ship, Right Place, Right Time

The original strategy refers to the “right ships with the right visitors in the right place at the right time.” Horizon 2 adds the dimension of **value**, marking a fundamental shift from passive value expectation to active value delivery for cruise lines, passengers and communities. Right value, right ship, right place, right time becomes a useful guiding mantra for the New Zealand cruise sector reminding all players of the importance of first *providing* value.

Value for cruise lines as customers means treating them as valued strategic partners - understanding their commercial requirements, solving problems collaboratively, providing pricing transparency, enabling operational ease, building relationship-based trust and ensuring uniquely New Zealand experiences are on offer with a continuous improvement approach.



Value for passengers as guests means distinctive experiences leveraging our distinctive experiential strengths, seamless ship-to-shore flow, regenerative approaches, authentic cultural integration, regional diversity. Every guest is a potential advocate or repeat visitor.



Value for communities as beneficiaries means cruise respects social licence of communities and gives back e.g., infrastructure improvements benefiting locals, economic contribution supporting regional viability, and natural environment benefits.



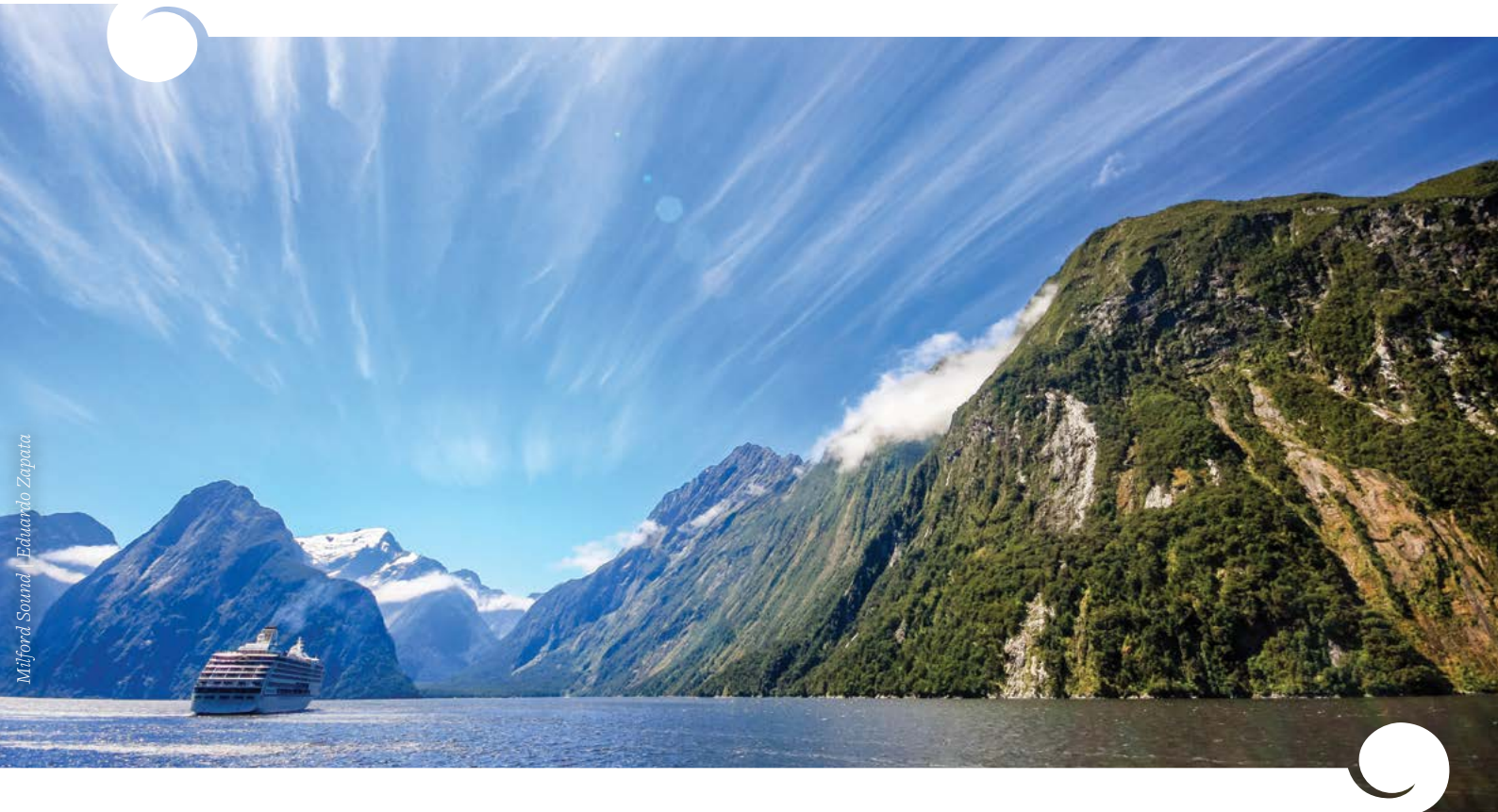
Until now we've assumed destination appeal would drive deployment, while competitors actively serve cruise lines and take our market share. This value delivery reorientation is strategically essential, represents an evolution of the original framing and aims to create alignment around a key concept: **delivering excellent value to cruise lines, and ensuring cruise serves communities well, will enable sustained deployment and long-term value in return.**

Horizon 2 adds the dimension of **value** marking a fundamental shift from passive value expectation to active value delivery for cruise lines, passengers and communities.

4.4 | The Longer Term: On Course to Be a World-Leading Cruise Destination

While immediate deployment enablement drives our near-term focus, Horizon 2 must simultaneously position New Zealand for enduring success on the global stage. Being world-leading means:

- **Delivering value to cruise lines and passengers exceptionally well.**
Making deployment commercially attractive while delivering outstanding guest and crew experiences that reflect New Zealand's uniqueness.
- **Operating as a connected national system.**
Ports, destinations, government and industry working in partnership to deliver consistency, integration and impact at every level.
- **Building capability and insight.**
Enabling people, data and innovation to continuously improve performance, anticipate change and demonstrate leadership within the cruise ecosystem.
- **Providing future-ready, sustainable infrastructure.**
Shore power at major ports, alternative fuel solutions, and collaborative trans-Tasman systems that support the industry's evolution to net-zero, positioning New Zealand as a forward-thinking destination partner and attracting modern vessels.
- **Delivering to our distinctive strengths.**
Grounding growth in what makes New Zealand unique and valuable, with clarity about our proposition and the experiences only we can offer.
- **Managing growth to optimise capacity.**
Aligning ship types and volume to optimise regional capacity, ensuring balanced visitation that's good for cruise lines, appropriate for each port, serves passengers and is welcomed by communities.



Milford Sound - Eduardo Zapata

2026

Urgent deployment enablement

2027-28

Sustained deployment with capability development

2029-30

Confidence builds through world-class capability



5.0 HORIZON 2 NAVIGATION

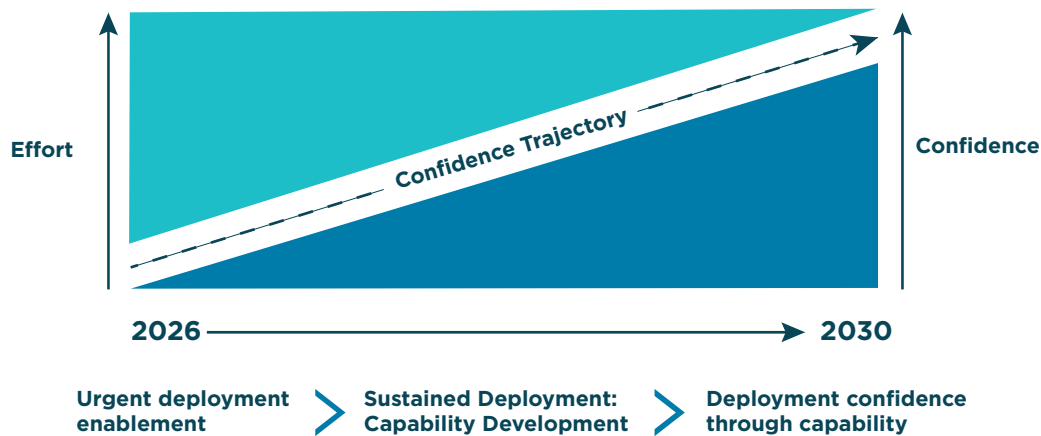
Horizon 2 operates with deployment enablement as the organising principle. How we build deployment confidence evolves from urgent barrier removal to embedded systems to world-leading capability. Emphasis shifts to balance immediate urgency with long-term capability building.

This is a progressive build where deployment enablement effort peaks early then sustains, while capability development gradually intensifies building long-term deployment confidence.

5.1 | From Deployment Urgency to World-Class Capability

2026 Urgent deployment enablement

Enabling deployment is our primary focus. The 2028/29 window demands immediate action including removing barriers, demonstrating commitment, rebuilding reputation through delivery. Quick wins signal change. Cost and regulatory barriers need to be addressed urgently; stakeholders must collaborate on delivery while infrastructure gaps need coordinated attention. Our focus is urgent and we're building with the long term in mind — establishing mechanisms that endure, creating partnerships that grow and beginning the service excellence shift.



2027-28 Sustained deployment with capability development

Deployment enablement emphasis must continue through embedding systems rather than urgent fixes. We'll deliver by integration intensification improving regional consistency and coordination mechanisms, establishing systematic data flows, and deepening partnerships. Capability development will elevate in priority, and we will start to demonstrate what world-leading service means in practice.

2029-30 Confidence builds through world-class capability

Deployment confidence will be built through consistent delivery. New Zealand will be seen as consistent, easy to work with and a genuine partner. Operational excellence will become business-as-usual and world-class capability will be our primary focus to enable deployment. We'll build capability that will carry into Horizon 3 (2031 to 2040) where we'll aim to become world-leading through exceptional service to cruise lines, outstanding passenger experiences, meaningful community benefits, and nature protection.

5.2 | Evolving our Priorities

Horizon 2's five priorities build on Horizon 1's foundation and align with the five key themes from stakeholder engagement. They continue Horizon 1's progress while addressing current challenges and future opportunities. Together, they apply our learnings, balance addressing short-term constraints with New Zealand's long-term cruise potential, and sustain momentum toward the 2040 vision.

Measure & Demonstrate Value	Champion Government Leadership & Continuity	Advance Partnership & Customer Focus	Strengthen Collaboration & System Integration	Develop Competitive Operational Excellence
01	02	03	04	05

01. Measure & Demonstrate Value

Evolved from H1 priority 1

Establishing integrated and enduring measurement systems to inform decisions, build deployment confidence, and strengthen national and regional advocacy.

02. Champion Government Leadership & Continuity

Evolved from H1 priority 3

Embedding cruise priorities into government operational systems, building bipartisan political support, building direct relationships across key agencies, and ensuring coordinated cross-agency action that survives electoral cycles.

03. Advance Partnership & Customer Focus

Evolved from H1 priority 4

Transforming cruise line relationships into strategic partnerships through service excellence, establishing industry-led engagement mechanisms, and positioning New Zealand as a customer-focused destination.

04. Strengthen Collaboration & System Integration

Evolved from H1 priority 5

Establishing a unified national narrative, building coordinated national-regional stakeholder systems, and elevating regional capability through differentiated support.

05. Develop Competitive Operational Excellence

New

Addressing critical infrastructure gaps and cost barriers, establishing transparent and competitive operating frameworks, and building long-term capability for world-class cruise operations.

Our focus is urgent and we're building with the long term in mind-establishing mechanisms that endure, creating partnerships that grow and beginning the service excellence shift.



Dumedin

ACTION PLAN

1 MEASURE & DEMONSTRATE VALUE 

2 CHAMPION GOVERNMENT LEADERSHIP & CONTINUITY 

3 ADVANCE PARTNERSHIP & CUSTOMER FOCUS 

4 STRENGTHEN COLLABORATION & SYSTEM INTEGRATION 

5 DEVELOP COMPETITIVE OPERATIONAL EXCELLENCE 



5.3 | Action Plan

1. MEASURE & DEMONSTRATE VALUE			
Outcomes	Action	Roles	Timing
Evidence-based policy and decision making	Integrate cruise into the tourism data system	Lead: NZCA Support: CLIA, Cruise Lines, Customs, Port, Stats NZ Influence: MBIE	2026
	Ensure cruise metrics are visible as part of official tourism data for resource mobilisation & inter-agency coordination	Lead: NZCA Support: NZCA, Customs, Port, Stats NZ, TNZ Influence: MBIE	2026
	Explore alternative data sources including establishing formal data sharing agreements with major cruise lines e.g., passenger arrivals data and satisfaction scores via MOU/NDA agreements	Lead: NZCA Support: CLIA, Cruise Lines, Stats NZ Influence: MBIE	2026
	Enable consistent national and NZ regional stakeholder access to data reporting	Lead: NZCA Support: Stats NZ, CLIA Influence: MBIE	2026
Aligned target setting and performance monitoring	Investigate deployment-focused goals and targets in consultation with cruise lines e.g., ship deployment & port calls	Lead: NZCA Support: CLIA, Cruise Lines	2026
	Closely monitor cruise line commitment levels, forward bookings, and confidence of Australasian regional or global deployment leads	Lead: NZCA Support: CLIA, Cruise Lines	Ongoing
	Establish targets and measures for cruise growth over the next five years aligned with TNZ focus on passenger arrivals and government Tourism Growth Roadmap goals of doubling tourism export value	Lead: NZCA Support: TNZ Influence: MBIE	2026
	Align key metrics across the Tasman as part of the collaboration agenda with Australia	Lead: NZCA Support: ACA Influence: MBIE	2027/28
Evidence-based advocacy	Develop a measurement framework that enables key data points for national cruise narrative e.g., <ul style="list-style-type: none"> • Inclusion of cruise passengers in official arrival data • Australasia and NZ regional deployment forecast • Port calls forecast and confirmed • Passenger arrivals forecast and confirmed • Market share against global growth • Economic impact measurement (national and regional) • Environmental impact measurement • Passenger/guest satisfaction data (national and regional) • Value chain map (e.g., tourism product sold) 	Lead: NZCA Support: TNZ, Stats NZ, CLIA, Cruise Lines, ITOs, isites Influence: MBIE, Maritime NZ	2026
	Develop a measurement and reporting framework that enables key data points for an aligned, locally relevant narrative by NZ region	Lead: NZCA Support: Stats NZ, CLIA, Cruise Lines, Ports, RTOs, isites Influence: MBIE	2027/28

2. CHAMPION GOVERNMENT LEADERSHIP & CONTINUITY

Outcomes	Action	Roles	Timing
Government stakeholders enabled as cruise leaders and advocates	Leverage and strengthen government leadership, coordination and momentum through ongoing ministerial engagement, feedback and tactical planning	Lead: NZCA Influence: MBIE, MPI, DOC, Customs, Transport, Maritime NZ	2026
	Ensure consistent cruise sector understanding in key politicians (national/regional) & agencies e.g., deployment focus, operations, economics, competitive position	Lead: NZCA Support: CLIA, Cruise Lines, Councils Influence: MBIE, MPI, DOC, Customs, Transport, Maritime NZ	Ongoing
	Engage ministers and government agency leaders in key platforms, industry forums, and announcements	Lead: NZCA Influence: MBIE, MPI, DOC, TNZ, Customs, Transport, Maritime NZ	Ongoing
	Engage Tourism New Zealand as an active cruise supporter - an additional strategic intervention at a critical time for cruise reinforcing its integral tourism role	Lead: NZCA Support: TNZ	2026
Bipartisan political support established	Build bipartisan support by exploring a tailored engagement approach with opposition parties identifying levers that match their agenda	Lead: NZCA Support: CLIA, Cruise Lines Influence: MBIE, MPI, DOC, TNZ, Customs, Transport, Maritime NZ	2026
	Leverage/package economic impact evidence, community support and benefit data, sustainability initiatives, passenger ratings and regional stakeholder advocacy	Lead: NZCA Support: CLIA, Cruise Lines	2026

2. CONTINUED...

Outcomes	Action	Roles	Timing
Coordinated cross-agency action delivers results	Support biannual New Zealand Cruise Forum (cross-government/ industry group) as the lead enabling mechanism	Lead: NZCA Support: CLIA, Cruise Lines Influence: MBIE, MPI, DOC, TNZ, Customs, Transport, Maritime NZ	Ongoing
	Facilitate industry-government partnership enablement mechanisms e.g., data sharing agreements, collaborative solution development, aligned view of success	Lead: NZCA Support: CLIA, Cruise Lines Influence: MBIE, MPI, DOC, TNZ, Customs, Transport, Maritime NZ	2026
	Encourage simplification of government agency engagement processes for cruise regulatory requirements and explore central coordination	Lead: NZCA Influence: MBIE, MPI, DOC, Customs, Transport, Maritime NZ	2026
	Trans-Tasman government coordination for regional growth: <ul style="list-style-type: none"> Support Ministerial engagement & MBIE-AusTrade coordination for regional policy alignment with Australia Consider Tasman task force reflecting ACA Strategic Action Plan priorities to align approaches 	Lead: NZCA Support: ACA, CLIA, Cruise Lines Influence: MBIE, Maritime NZ	2027/28

3. ADVANCE PARTNERSHIP & CUSTOMER FOCUS

Outcomes	Action	Roles	Timing
Cruise industry partnership mechanisms established	Identify, confirm and systematically engage the right cruise line executives with the right NZ stakeholders via the right channels. e.g., SeaTrade attendance, Australasia industry meetings, cruise line/government agency meetings	Lead: NZCA Support: Ports, RTOs, CLIA, Cruise Lines	Ongoing
	Explore Aviation industry engagement type model applying learnings to cruise, e.g., individual relationship building, industry-led government agency engagement where cruise industry explains how to enable growth	Lead: NZCA Support: CLIA, Cruise Lines Influence: MBIE, Maritime NZ	2026
	Support MBIE and Maritime NZ to work collaboratively with cruise lines through enabling trusted relationships & solution development forums	Lead: NZCA Support: CLIA, Cruise Lines Influence: MBIE, Maritime NZ	Ongoing
Long-term customer-focus enabled	Apply longer term deployment thinking to align with cruise lines for future deployment (minimum 3-to-5-year outlook)	Lead: NZCA/Ports Support: CLIA, Cruise Lines	Ongoing
	Monitor cruise line deployment commitments, forward bookings, and confidence of regional/global deployment leads to track and respond proactively	Lead: NZCA/Ports Support: CLIA, Cruise Lines	Ongoing
	Establish systematic customer feedback loops including cruise line satisfaction measurement & strategic performance ratings for NZ as a destination	Lead: NZCA Support: CLIA, Cruise Lines, Ports, RTOs	2027/28
	Initiate and facilitate a workstream focused on defining what world class success for cruise looks like (customer and stakeholder perspectives)	Lead: NZCA Support: CLIA, Cruise Lines, Ports, RTOs, ITOs	2027/28
Port-led service excellence operational	Support the port-led shift to cruise lines as key strategic customers and value generating partners, e.g., tailored service packages, ease of operations, aligned port-RTO relationship, guest experience, commercial incentives, fees transparency	Lead: Ports Support: NZCA, CLIA, Cruise Lines, RTOs, ITOs	2026
	Encourage port monitoring of key customer performance metrics e.g., turnaround times, passenger/guest flow, passenger satisfaction ratings, destination spend, and sustainability considerations	Lead: Ports Support: NZCA, CLIA, Cruise Lines, RTOs	2027/28
	Support appropriate dedicated customer-facing resource i.e., a cruise line relationship lead with supporting operational resource depending on port size/capability	Lead: Ports Support: NZCA, CLIA, Cruise Lines, RTOs	2027/28

4. STRENGTHEN COLLABORATION & SYSTEM INTEGRATION

Outcome	Action	Resource	Timing
Unified deployment narrative embedded	Establish deployment-led national narrative consistency through clear documentation and coordinated delivery	Lead: NZCA Support: NZ sector	2026
	Drive cultural shift across stakeholders toward deployment-welcoming, service-focused approach	Lead: NZCA Support: NZ sector	Ongoing
	Ensure regional narrative aligns to national messaging to maximise impact and avoid dilution especially when regions/ports directly engage cruise lines	Lead: NZCA Support: Ports, RTOs	Ongoing
National-regional coordination systems established	Develop a stakeholder roles and responsibilities matrix defining each organisation's deployment contribution	Lead: NZCA Support: Ports, councils, agencies, RTOs, ITOs, others	2027/28
	Create 'crisis' response plans for fast, coordinated cruise sector action on deployment threats	Lead: NZCA Support: Ports, councils, agencies, RTOs, CLIA, Cruise Lines, Port agents	2027/28
	Establish nationwide, cruise industry-led education programmes for regional decision-makers including cruise line needs, deployment decision-making, operations, economics, customer relationships, product development	Lead: NZCA Support: Ports, councils, RTOs, CLIA, Cruise Lines, ITOs	2027/28
	Support port CEO forum for collaborative problem-solving on shared challenges e.g., pricing frameworks, service standards	Lead: Ports Support: NZCA	Ongoing
	Build Mayors/Chairs and key influencer engagement, targeting councils; facilitate experiencing cruise operations firsthand (ports and ships)	Lead: NZCA Support: Ports	Ongoing
Regional operational excellence enabled	Establish additional forums and opportunities for regions to share knowledge and learn from each other beyond annual cruise conference	Lead: NZCA Support: RTOs, Ports, CLIA, Cruise Lines, ITO's	2027/28
	Enable consistent approach for regional integration into national cruise marketing/communications e.g., SeaTrade attendance/profile	Lead: NZCA Support: RTOs, Ports	2027/28
	Facilitate consistent information flow about vessel bookings & arrivals ensuring all regional stakeholders have simultaneous access	Lead: NZCA Support: RTOs, Ports, Port Agents	2027/28
	Support regions to develop differentiated operational capability aligned with best practice and national narrative including cross-functional teams, playbooks, stakeholder briefings and annual improvement reviews	Lead: RTOs Support: NZCA, Ports, Port Agents, ITOs	2027/28

5. DEVELOP COMPETITIVE OPERATIONAL EXCELLENCE

Outcomes	Action	Resource	Timing
Critical infrastructure and immediate barriers resolved	Support near-term port-led implementation and MPI development of long-term biofouling management solutions	Lead: Ports Support: NZCA, MPI Influence: MBIE, Maritime NZ	2026
	Facilitate industry input to biofouling policy development ensuring cruise line operational requirements inform solutions	Lead: NZCA Support: CLIA, Cruise Lines, Ports, MPI	2026
	Support and facilitate alignment with global practices for fees management in collaboration with CLIA, MBIE and key agencies	Lead: NZCA Support: CLIA, Cruise Lines, MPI Influence: MBIE, Maritime NZ	2026
	Conduct competitor benchmarking of key costs for cruise lines to understand NZ's relative competitive position	Lead: CLIA Support: NZCA, Cruise Lines, Ports Influence: MBIE, Maritime NZ	2026
	Advocate for fair and reasonable costs (government agency and ports) that reflect realistic service value and enable competitive deployment decisions	Lead: NZCA Support: CLIA, Ports, MPI, DOC, Customs, Transport Influence: MBIE, Maritime NZ	2026
	Support a review of cruise fee and levy settings to ensure coordinated approach across agencies	Lead: NZCA Support: CLIA, Cruise Lines Influence: MBIE, Maritime NZ	2026
	Support establishment of 18-month forward pricing visibility across all cruise-related costs enabling cruise line planning cycles	Lead: Ports, NZCA Support: CLIA, Cruise Lines, MPI, DOC, Customs Influence: MBIE, Maritime NZ	2026

5. CONTINUED...

Outcomes	Action	Resource	Timing
Transparent and competitive operating frameworks established	Advocate for regulatory simplification across agencies reducing multi-agency complexity while maintaining necessary standards	Lead: NZCA Support: MPI, DOC, Customs, Transport, Maritime NZ, CLIA Influence: MBIE	2026
	Support alignment with International Maritime Organisation protocols where appropriate for global consistency	Lead: NZCA Support: MPI, DOC, Customs, Transport, CLIA Influence: MBIE, Maritime NZ	2026
	Develop a framework for best practice operational guidelines that supports long-term regional capability and adaptation of national direction for local relevance	Lead: NZCA Support: CLIA, RTOs	2027/28
	Explore segmentation approach with differentiated regulatory requirements based on ship size, passenger numbers, and operational risk profile including development of compliance pathways appropriate to vessel type (expedition, mid-size, large) and actual impact	Lead: NZCA Support: MPI, DOC, Customs, Transport, Councils, CLIA Influence: MBIE, Maritime NZ	2029/30
	Facilitate cruise industry input to ensure operating frameworks reflect needs and insights from industry	Lead: NZCA Support: CLIA, Cruise Lines	Ongoing
Future-ready world-class capability underway	Initiate cross-sector dialogue defining world-class positioning and operational excellence for NZ cruise e.g., early adopter & partner in cruise sustainability, clear value proposition, compelling offer	Lead: NZCA Support: NZ sector	2029/30
	Advocate for infrastructure and systems enabling cruise lines to meet IMO Net-Zero framework targets	Lead: NZCA Support: CLIA, NZ sector	2029/30
	Support further exploration and development of shore power capability at major ports as industry transitions to lower emissions	Lead: Ports Support: NZCA Influence: MBIE, Maritime NZ	2029/30
	Support further exploration of alternative fuel bunkering infrastructure positioning New Zealand for future propulsion technologies	Lead: Ports Support: NZCA Influence: MBIE, Maritime NZ	2029/30
	Consider potential for trans-Tasman partnership with Australia aligning infrastructure, policy, and standards to create South Pacific leadership in low-emission cruising	Lead: NZCA Support: ACA Influence: MBIE, Maritime NZ	2029/30

Note: Lead and support roles to be confirmed through stakeholder consultation.

Governance

Stewardship

Owner:
NZCA Board

Delivery

Activation

Owner:
Cruise Sector
Stakeholders

Enablement

Policy & Coordination

Mechanism:
Cross-government
industry forum

6.0 IMPLEMENTATION

6.1 | Governance Framework

Cruise Aotearoa New Zealand 2040 is created for and on behalf of the cruise sector by NZCA. Implementation depends on coordination across many organisations with each making a critical contribution in a connected system. This framework outlines the core contributions of governance (stewardship), delivery (activation), and enablement (policy & coordination):

1. Governance (Stewardship of cruise strategy)

Owner: NZCA Board.

Focus: Strategic leadership of national cruise strategy, stewardship of H2 implementation through influence, advocacy and progress monitoring.

Composition: Representation includes RTOs, operators, ports, ground handler, port agent, TIA, TNZ.

Key Responsibilities: Own and steward the strategy; Guide directional shifts; Track progress; Ensure representation & progress visibility; Surface and escalate critical barriers; Ensure NZCA capacity matches stewardship requirements; Address Board composition gaps (e.g., transport sector, airlines/airports, North/South Island representation balance).

Meeting Rhythm: Quarterly (to be reviewed annually)

Inputs: Quarterly progress report from NZCA Executive; Biannual reports from Government/Industry Forum; Annual progress reviews from Cruise Conference; Direct stakeholder engagement and relationship intelligence.

Integration: NZCA Executive & Chair represent Board at Government/Industry Forum; Board members leverage relationships and forums with their industry peers for wider sector activation; Annual participation in Cruise Conference progress review; Informs sector-wide NZCA-led communications.

2. Delivery (Activation of cruise strategy)

Owner: New Zealand Cruise Sector stakeholders.

Focus: Delivery of Horizon 2 actions, embedding cruise priorities into planning and operations, championing cruise within organisations and industry peer groups.

Composition: NZCA, Ports, RTOs, tourism operators, transport operators, ground handlers, port agents, local government, TNZ, industry associations (e.g. TIA, Hospitality NZ), hospitality and retail operators, isites, community ambassadors & volunteers, providers, fuel suppliers.

Key Responsibilities: Deliver actions where designated as 'lead' organisation; Embed H2 priorities into strategic and annual planning cycles and operational execution; Report progress; Align narrative to national deployment messaging; Coordinate & collaborate locally while connecting to national strategy.

Inputs: NZCA toolkits, key messages, and regional/organisational planning inputs; Cruise line feedback and requirements; National & regional market intelligence and visitor data; Best practice sharing across regions and within industry peer group.

Integration: Regional connection of local delivery to national strategy; Progress reported through annual Cruise Conference and NZCA engagement; Input to cross-government-industry forum on barriers requiring government action via NZCA; Two-way flow with NZCA Executive on specific support needs.

3. Enablement (Government policy & coordination)

Focus: Work collaboratively with the cruise industry to enable a sustainable and world leading cruise sector that delivers outstanding visitor experiences and long-term economic benefits for New Zealand.

Mechanism: Biannual cross-government-industry forum enabling structured engagement between the cruise industry and government agencies to identify ways to support cruise sector growth.

Priorities: Encouraging innovation in biofouling management and in-water cleaning solutions; Improving visibility of changes to fees and levies affecting cruise operations; Increasing understanding of the cumulative impact of government and port costs on the sector; Improving visibility and understanding of potential regulatory changes and impacts.

Government Participation: Ministers for Tourism & Hospitality, Biosecurity, Customs, Transport (Associate), Conservation and others as required; CE's/ delegates for MBIE, MPI, NZ Customs, Maritime NZ, DOC.

Industry Participation: New Zealand Cruise Association (NZCA), Cruise Lines International Association (CLIA), Tourism Industry Aotearoa (TIA), Port CEO Group, Cruise lines operating in New Zealand.

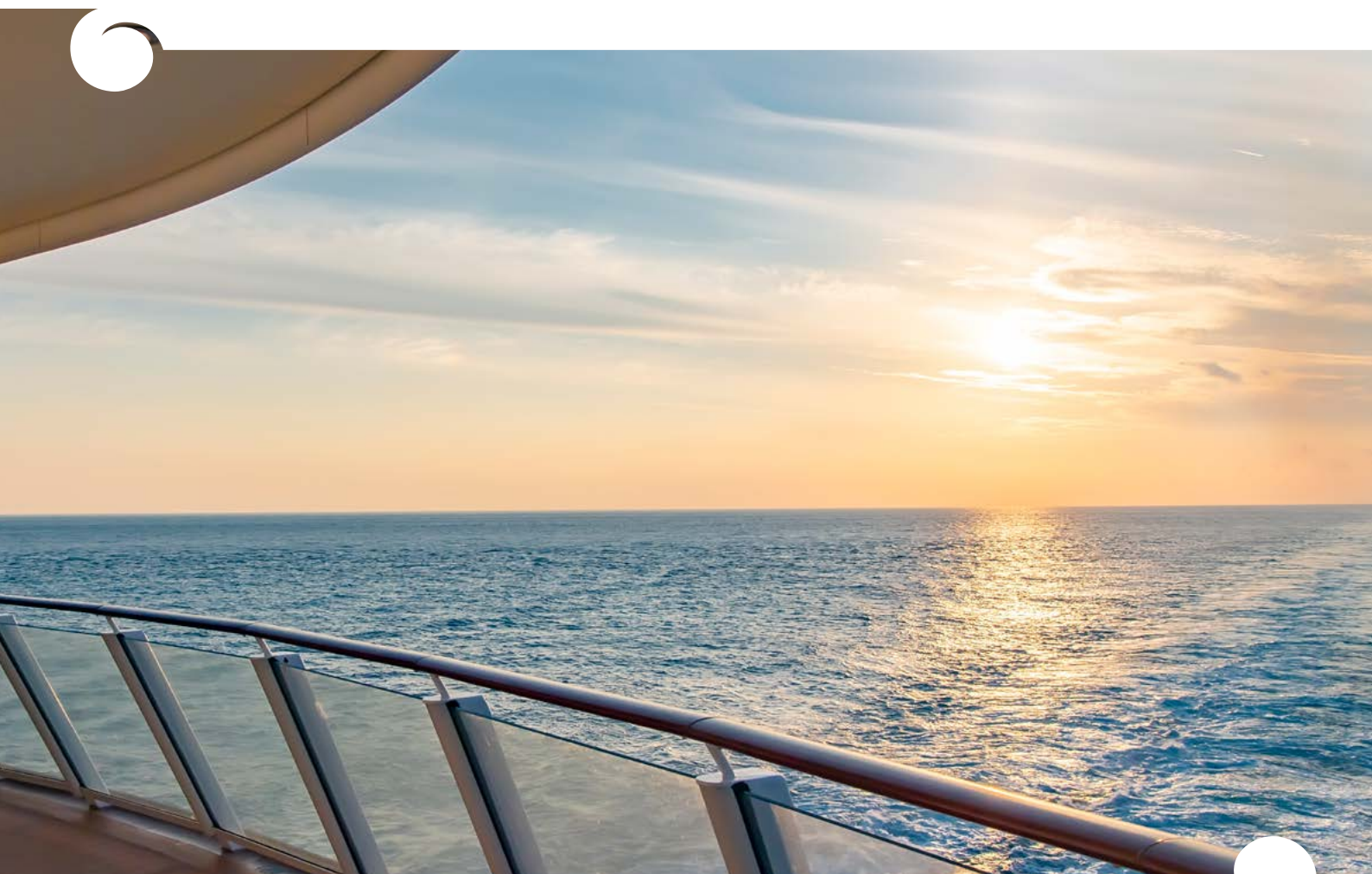
Interface with Strategy: Government and industry enablement actions reported at forum; Outcomes create conditions for strategy delivery; NZCA and industry representatives provide progress updates and barrier escalation.

6.2 | Performance and Monitoring

Long-term: Cruise Aotearoa New Zealand 2040

Long-term strategy performance will be tracked against the seven goals across our four contribution areas from the original Cruise Aotearoa New Zealand 2040.

CONTRIBUTION	GOAL	TARGET
Economy	1 Grow cruise direct expenditure	\$1 billion by 2040
Environment	2 Net carbon zero	Tourism supply chain by 2040 and cruise lines by 2050
	3 Zero waste to landfill	At least 90% of waste diverted from landfill by 2040 at the latest
Community	4 Cruise tourism is good for NZ	90% of New Zealanders think cruise tourism is good
	5 Cruise tourism is good for Māori & iwi	Grow Maori Tourism partnerships within the cruise sector nationwide
Visitor	6 High visitor satisfaction with NZ	90% of cruise visitors satisfied with NZ experience
	7 High passenger satisfaction	90% average NPS scores across cruise lines



Near to mid-term: Horizon 2 2030

Progress indicators for Horizon 2 to monitor deployment enablement through coordinated action:

MEASURE	PROGRESS INDICATOR	SOURCE
Australia and NZ Region Deployment Forecast	<ul style="list-style-type: none"> • Positive upswing & narrative • Year on year growth 	CLIA; Regional cruise line deployment leads
Annual Ship Deployment	<ul style="list-style-type: none"> • Meets or exceeds forecast • Year on year growth 	Cruise Lines
National Port Calls Scheduled	<ul style="list-style-type: none"> • Year on year growth 	Port Agents
Annual Economic Output	<ul style="list-style-type: none"> • Year on year growth 	CLIA/NZCA Value of Cruise Tourism
Market Share of Global Growth	<ul style="list-style-type: none"> • Growing share % 	CLIA
NZ Resident, Media & Community Sentiment	<ul style="list-style-type: none"> • Positive and improving 	Views on Tourism research; Regional reports; Media monitoring

Review Rhythm

- **Quarterly:** NZCA Board progress dashboard and barrier resolution
- **Biannual:** Government/Industry Forum progress, coordination and government delivery
- **Annual:** Cruise Conference comprehensive review and stakeholder accountability
- **End of Horizon 2 (2030):** Full strategy review and H3 transition planning



Wellington

6.3 | Key Risks Assessment

RISK	IMPACT	CHANCE	MITIGATION APPROACH	RESIDUAL RISK
<p>Change of Government in 2026 Election</p> <p>New government may deprioritise cruise support</p>	High	Medium	<ul style="list-style-type: none"> Advocate for bipartisan support through targeted engagement Encourage embedding priorities into govt systems where possible Demonstrate measurable value to create compelling case Show TGR alignment for cross-party appeal 	Medium
<p>Ministerial Portfolio Change</p> <p>Cabinet reshuffle could shift portfolio to minister with less cruise appetite</p>	High	Medium-high	<ul style="list-style-type: none"> Build relationships across cabinet Cement strong relationships with MBIE Brief incoming minister on achievements Cruise priorities in agency operational plans 	Medium
<p>Government Agency Fee</p> <p>Increases Government agencies increase fees without coordination</p>	High	Medium-high	<ul style="list-style-type: none"> Advocate for cross-agency fee coordination mechanism Fee schedule with 18-24 months notice Align with Australia on fee structures Cost-benefit analysis showing long-term value 	Medium
<p>Legislative/Regulatory Changes Impacting Data</p> <p>Collection Changes required for counting of cruise transit passengers (not in official statistics), slowing progress</p>	Medium	Medium	<ul style="list-style-type: none"> Work with MBIE/StatsNZ to identify minimum changes required Explore alternative data collection methods Establish data-sharing with cruise lines Cruise integration into existing data systems (IVS, TDLG) 	Low-medium
<p>NZCA Capacity constraint</p> <p>NZCA designated as lead on majority of H2 actions but has limited capacity and resource constraints</p>	High	High	<ul style="list-style-type: none"> Explore funding lift through expanded membership, partnerships Contract dedicated resources for key functions (e.g., communications) Clarify lead vs support role expectations with stakeholders Prioritise to focus on highest-impact actions 	Medium-high
<p>Regional Stakeholders Fragmented & Misaligned</p> <p>Variable regional capacity and readiness; regions operating in silos pursuing own goals not NZ deployment; inconsistent messaging to cruise lines</p>	High	Medium-high	<ul style="list-style-type: none"> Establish additional national-regional coordination mechanisms e.g. forums Create deployment-led narrative framework for regional alignment Develop roles/responsibilities matrix defining regional contributions to goals Establish metrics measuring regional alignment to national priorities 	Medium

6.3 Continued...

RISK	IMPACT	CHANCE	MITIGATION APPROACH	RESIDUAL RISK
<p>Port Competition Undermines Collective</p> <p>Approach Ports competing for cruise business work rather than collaborating; inconsistent pricing approaches and service levels</p>	Medium-high	Medium	<ul style="list-style-type: none"> • Support cross-port forums • Develop shared value narrative emphasising bigger pie opportunity • Advocate pricing transparency & coordination • Encourage joint port-cruise line planning sessions 	Medium
<p>Council Decisions' Unintended Cruise Consequences</p> <p>Council decisions (fees/ infrastructure/ regulations) without understanding impacts on cruise</p>	Medium	Medium	<ul style="list-style-type: none"> • Council engagement and education • Leverage Mayors/Chairs forum • Ensure councils included in regional stakeholder forums • Share economic impact showing local value • Cruise ship famil experiences for leaders 	Low-medium
<p>Competitive Destination Intensification Competitors</p> <p>e.g., Japan, Singapore, Korea increase incentives, infrastructure and service; NZ falls further behind competitors</p>	Medium-high	High	<ul style="list-style-type: none"> • Benchmark against competitor destinations on costs, regulations, service • Identify NZ's unique value proposition (e.g. nature, service, seasonal advantage) • Leverage Tasman partnership to create regional offering • Communicate value proposition/ competitive advantages to cruise lines 	Medium

THANK YOU | NGĀ MIHI

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- MBIE Tourism
- Port of Auckland
- Princess Cruises
- Royal Caribbean Group
- Tātaki Auckland Unlimited
- Tourism New Zealand





By leading with value, building trust, and working together, New Zealand can create a cruise future that delivers for our economy, our communities, and our country.





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We are all in this together.



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