

Welcome to the New Zealand Cruise Association Conference 2026

Jacqui Lloyd - CEO

Announced at the AGM on Monday

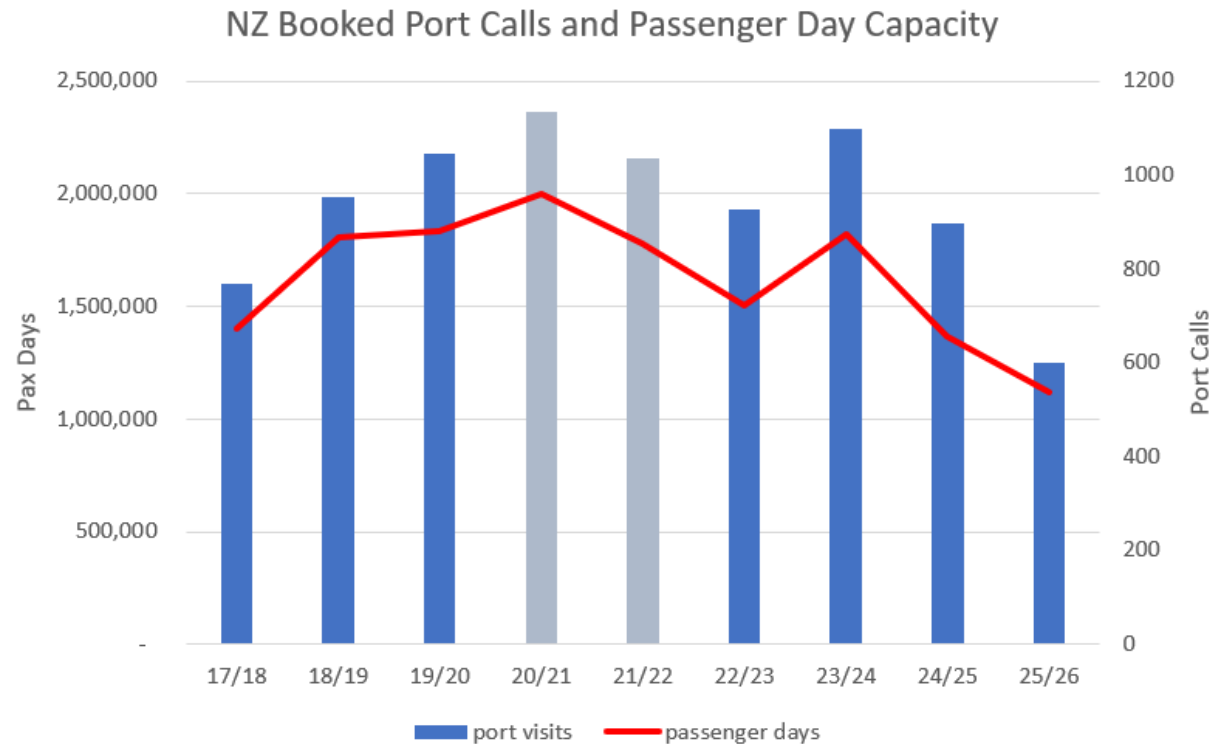
Avinash Murthy	Ports of Auckland
David Kriel	Napier Port
Karen Thompson-Smith	Tātaki Auckland Unlimited
Oscar Nathan	Tourism Bay of Plenty
Richard Carvalho	ISS Shipping
Sean Marsh	Te Puia
Tansy Tompkins	Wellington Cable Car
Victoria Hodson	Tranzit Coachlines Wellington
Bjoern Spreitzer	TNZ (Ex officio)
Rebecca Ingram	TIA (Ex officio)

Chair	Tansy Tompkins
Deputy Chair	Oscar Nathan
Treasurer	Victoria Hodson

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.

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



18% drop in port calls in 2024/25

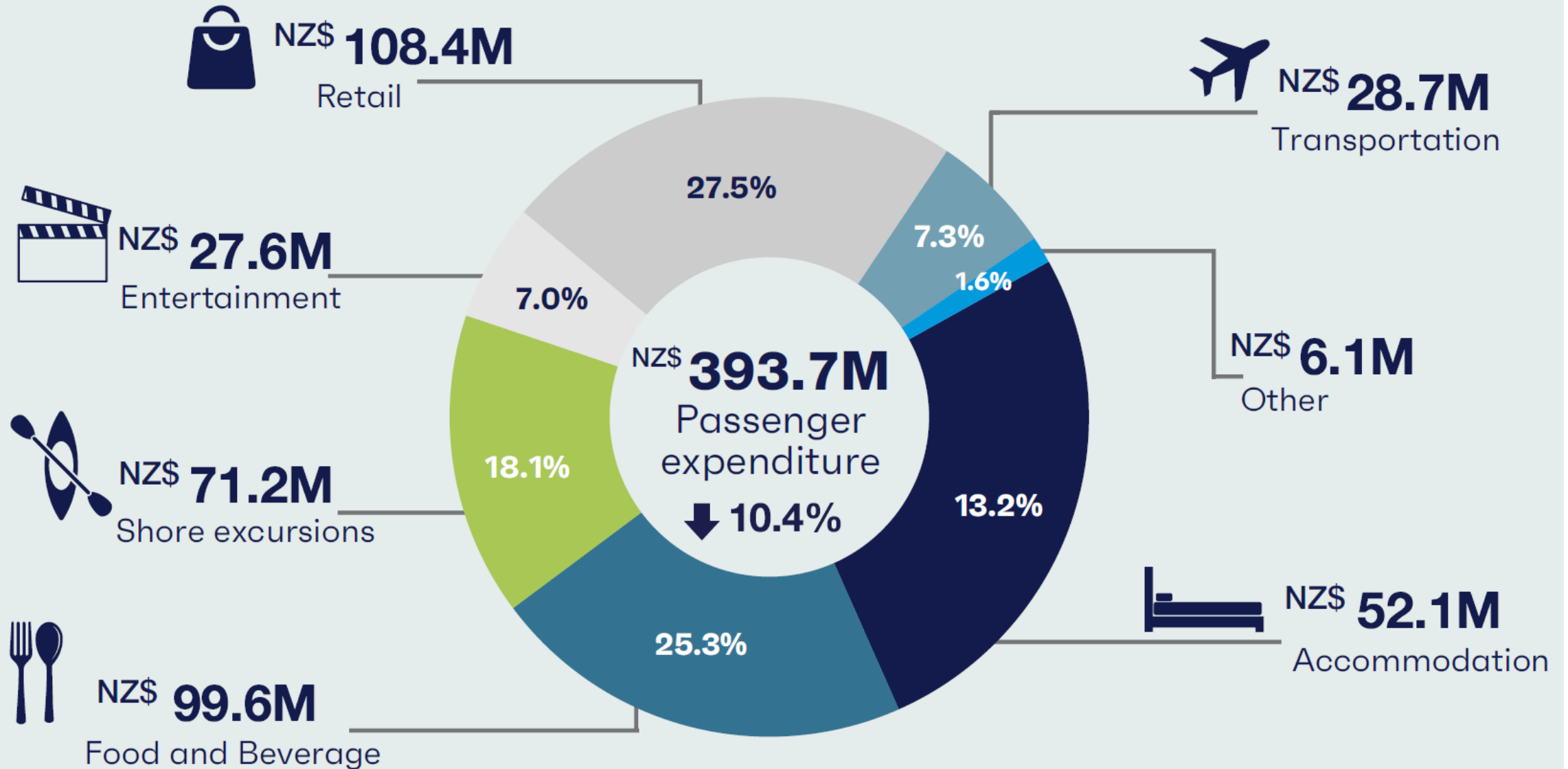
28% drop forecasted for 2025/26

Over 40% decline in bookings since 2023/24

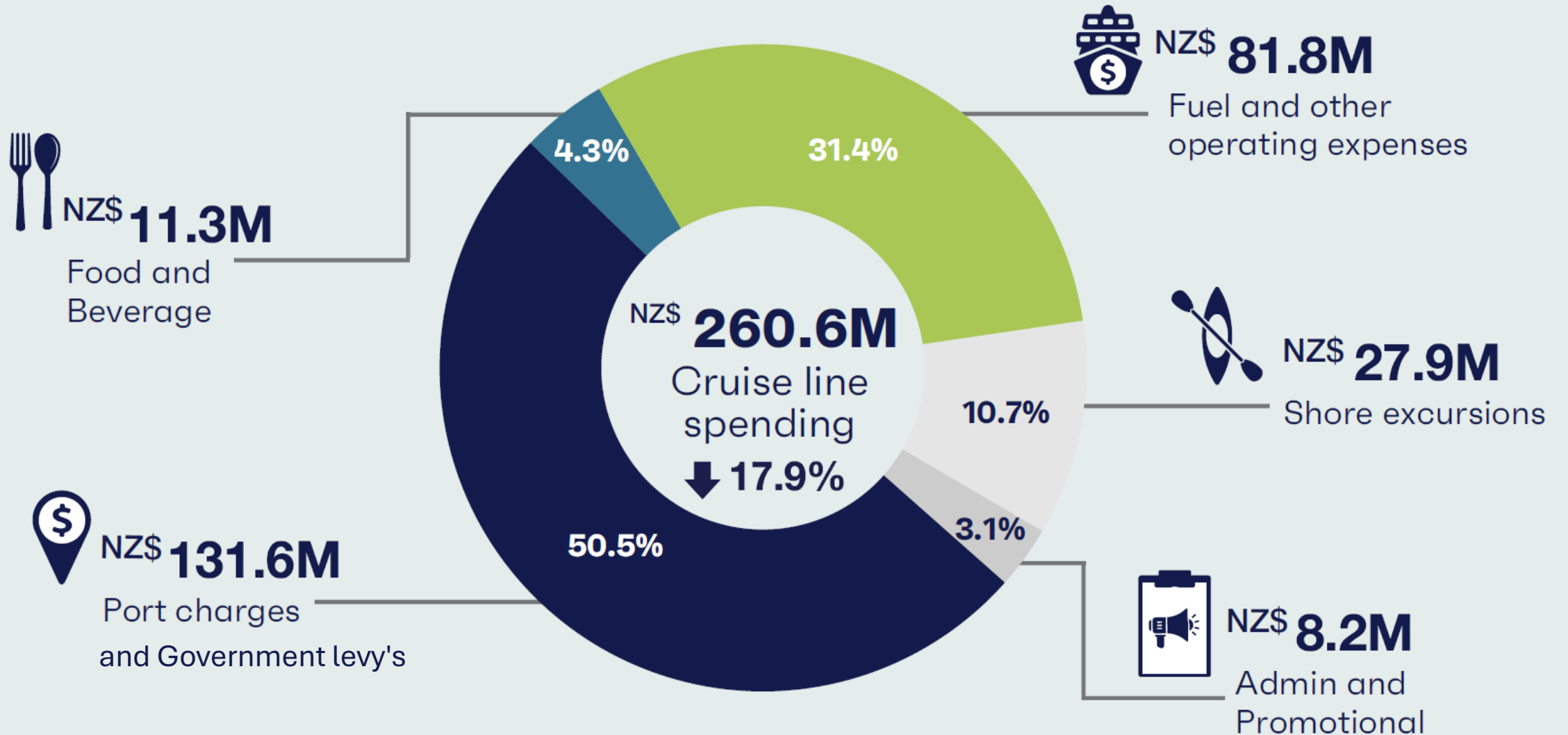
Impact already felt across regional economies



Down **9.8%**
Total Economic
Output



NZCA - Value of Cruise Tourism 24/25



Average passenger spend per day: ^{NZ\$}313

Turnaround Ports

Domestic pax

NZ\$ 723

International pax

NZ\$ 713

Transit Ports

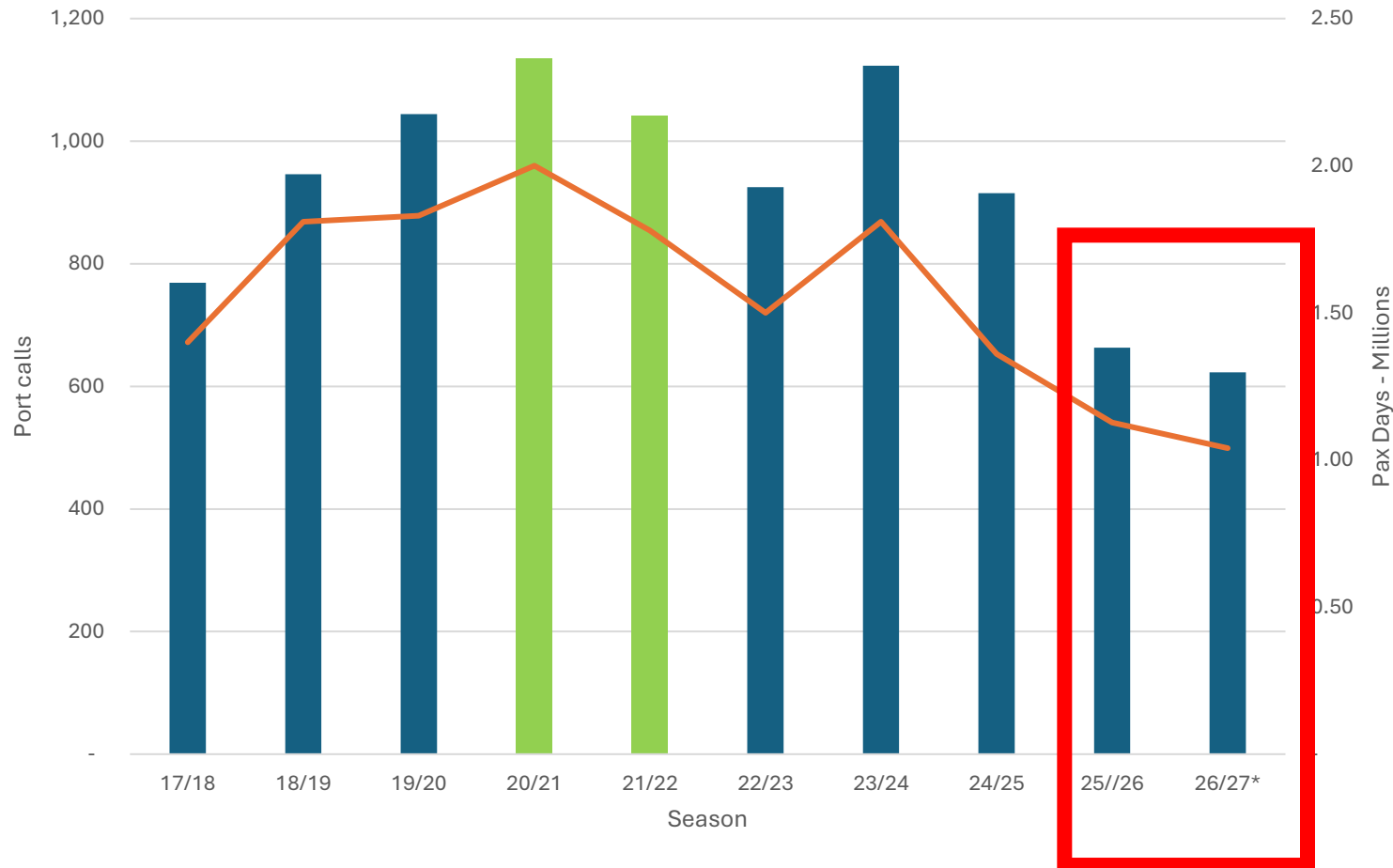
Domestic pax

NZ\$ 229

International pax

NZ\$ 247

Booked Port Calls and Pax Days



2026/27 plateau-ing

2028/29 receiving positive signals

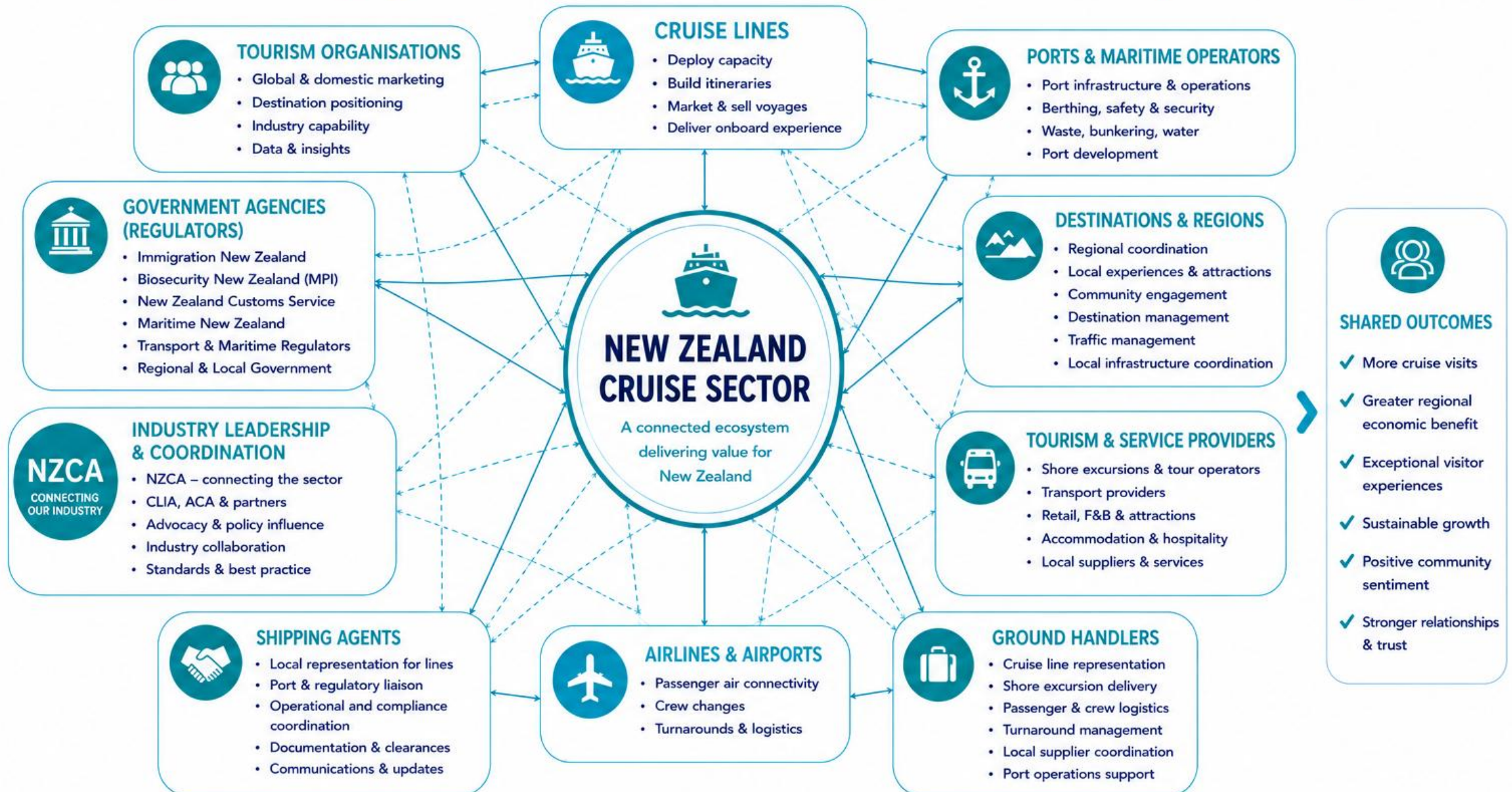
Booked	2023/24	2024/25	2025/26	2026/27	% change from 25/26 TO 26/27
Port Calls	1,120	915	663	643	-3%
Unique Guest Capacity	360,000	281,000	216,775	223,530	3%
Crew	149,000	120,000	92,935	96,911	4%
Vessels	55	46	39	33	-15%
Voyages	206	176	132	124	-6%
Passenger Days	1,818,503	1,366,640	1,127,824	1,070,264	-5%



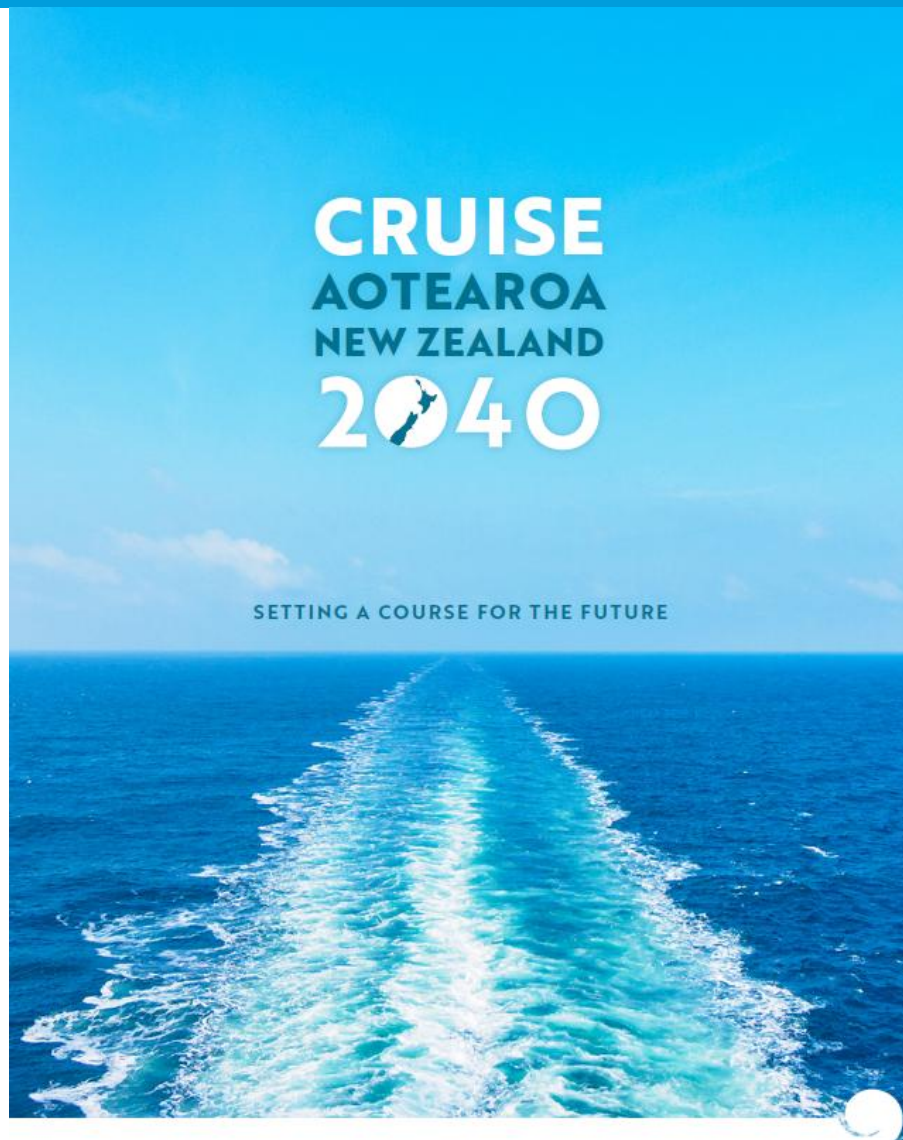


NEW ZEALAND CRUISE SECTOR – AN INTERCONNECTED ECOSYSTEM

No single owner. Many organisations working together to attract, enable and deliver exceptional cruise experiences.



Cruise Aotearoa New Zealand 2040 – Horizon Two



Cruise Aotearoa New Zealand 2040 – Horizon Two



Sentiment is shifting

New Zealand's change in tone and approach is being recognised and welcomed

Solutions are landing

Biosecurity progress and investment in cruise infrastructure are being noticed

Demand is still strong

New Zealand remains highly desirable, particularly for North American guests

New opportunities exist

Strong interest in new ports and experiences that combine unique product with operational ease

The window is open

Sydney slots drive NZ itineraries and stronger Trans-Tasman collaboration create an opportunity for growth from 2028/29

Keep pressure on:

Momentum is building, but we can't ease off - sustained advocacy is critical

Deployment is long-lead and driven by certainty

Cost competitiveness remains critical

Biosecurity risk still sits in the system

Global competition is strong

Strong demand is not consistently converting into deployment

Cruise is not well integrated into New Zealand's destination marketing

Consistent national delivery crucial



- Cross Government Cruise Forums
- Joint Ministerial Statement
 - improving regulatory certainty:
 - trans-Tasman cooperation
 - turnaround and homeporting
 - improved cross-sector data.
- Minister Upston at Seatrade
- Inclusion in the Tourism Policy Statement





**CREATE
CERTAINTY**



**STAY
COMPETITIVE**



**REBUILD
REPUTATION**



**GROW
VALUE**



**WIN
DEPLOYMENT**

Every decision, policy discussion, operational improvement and all part of our work should be tested against one central question

Does this give cruise lines confidence to deploy to New Zealand?

NO ZEALAND TO NEW ZEALAND



Thank you