



CRUISE INDUSTRY SOURCE MARKET REPORT

Ocean Cruise Passengers
New Zealand 2015



Get on Board & Expand Your Opportunities

CLIA is the world's largest cruise industry association, representing the interests of cruise lines, travel agents and industry stakeholders.

We provide a unified global voice advocating, educating and promoting the common interests of the cruise industry.

Membership Communities:

Cruise Lines; Travel Networks;
Travel Agencies; Travel Consultants;

Executive Partners:

Port & Destination; Travel and Tourism
Providers; Technical & Supply Chain Providers;
Professional Service Providers

To learn more about becoming a CLIA Executive Partner visit www.cruising.org.au or call +61 (02) 9964 9600

TOP 5 REASONS TO PARTNER WITH CLIA

1 Grow your business

Becoming a CLIA Executive Partner member puts you at the heart of the cruise industry, where you need to be to generate new business opportunities with cruise lines and other stake holders.

2 Meet with key decision makers

CLIA hosts a robust calendar of networking events across the world. There are multiple forums to discuss industry topics and fast track relationships with key decision makers.

3 Insight, expertise and guidance

CLIA is the gateway to a wealth of research and intelligence on the cruise industry. In addition, CLIA offers forums to discuss challenges and solutions to technical and regulatory matters, providing you with a unique, competitive edge.

4 Elevate your profile

Your business will be promoted to the entire cruise community, including more than 60 cruise lines, 275 fellow Executive Partner members and tens of thousands of travel agents at events, in publications and online.

5 Advocacy, representation and influence

CLIA is the unified voice before governments for legal and regulatory frameworks that promote a robust and sustainable cruise industry. CLIA Executive Partner members are part of this powerful unified voice and demonstrate to policy makers the cruise community's positive contributions to society.



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Established in 1975, Cruise Lines International Association (CLIA) is the unified voice and leading authority of the global cruise community. As the largest cruise industry trade association with 15 offices globally, CLIA has representation in North and South America, Europe, Asia and Australasia. CLIA's mission is to support policies and practices that foster a safe, secure, healthy and sustainable cruise ship environment for the more than 23 million passengers who cruise annually, as well as promote the cruise travel experience. Members are committed to the sustained success of the cruise industry and are comprised of the world's most prestigious ocean, river and specialty cruise lines; a highly trained and certified travel agent community; and other cruise industry partners, including ports, destinations, ship developers, suppliers, business services and travel operators.

For more information, visit www.cruising.org.nz

EXECUTIVE SUMMARY

More New Zealanders than ever before cruised in 2015, with ocean cruise passenger numbers growing by 10 per cent to a record high of 66,152.

New Zealand was one of just three international markets to record a double-digit increase in 2015 with only Australia and emerging hot spot China reporting stronger growth.

With Cruise Lines International Association (CLIA) Australasia's annual source market report now focussed solely on ocean cruising, in line with international CLIA reporting, the 2015 figures show the New Zealand passenger market has grown by almost 65 per cent in five years.

Over the past 10 years, New Zealand ocean cruise passenger numbers have risen by an average of 12.6 per cent a year.

The growth in 2015 was led by an increase in New Zealanders cruising in Australia (up 71 per cent) as well as Asia (up 64 per cent).

New Zealand's growth rate saw the nation maintain a market penetration rate of 1.4 per cent, ranking it sixth in the world, ahead of many established cruise nations.

KEY FINDINGS:

- The South Pacific maintained its place as the most popular destination for Kiwi cruisers with the region attracting one in three of the nation's ocean cruise passengers
- Europe retained second place with more than 12,500 Kiwis heading to the region for a fly-cruise holiday
- The number of New Zealanders cruising in Australian waters experienced the largest growth in 2015 - an impressive 71 per cent - with Australia replacing New Zealand as the third most popular cruise destination (a 12 per cent share)
- Remaining on par with 2014, the equivalent of 1.4 per cent of New Zealand's population took an ocean cruise last year, giving the nation a greater market penetration rate than established cruise markets like Italy (1.3 per cent), Spain (1 per cent) and France (0.9 per cent)
- The most popular cruise duration was 8-14 days, with more than half of all passengers (36,000) opting for this length, though longer voyages of 15-21 days saw the biggest jump of 25 per cent
- All age brackets remained steady with about a fifth of New Zealand cruisers under the age of 40 and about 45 per cent aged over 60
- New Zealand cruise passengers spent almost 680,000 days at sea in 2015, up 13 per cent from 2014

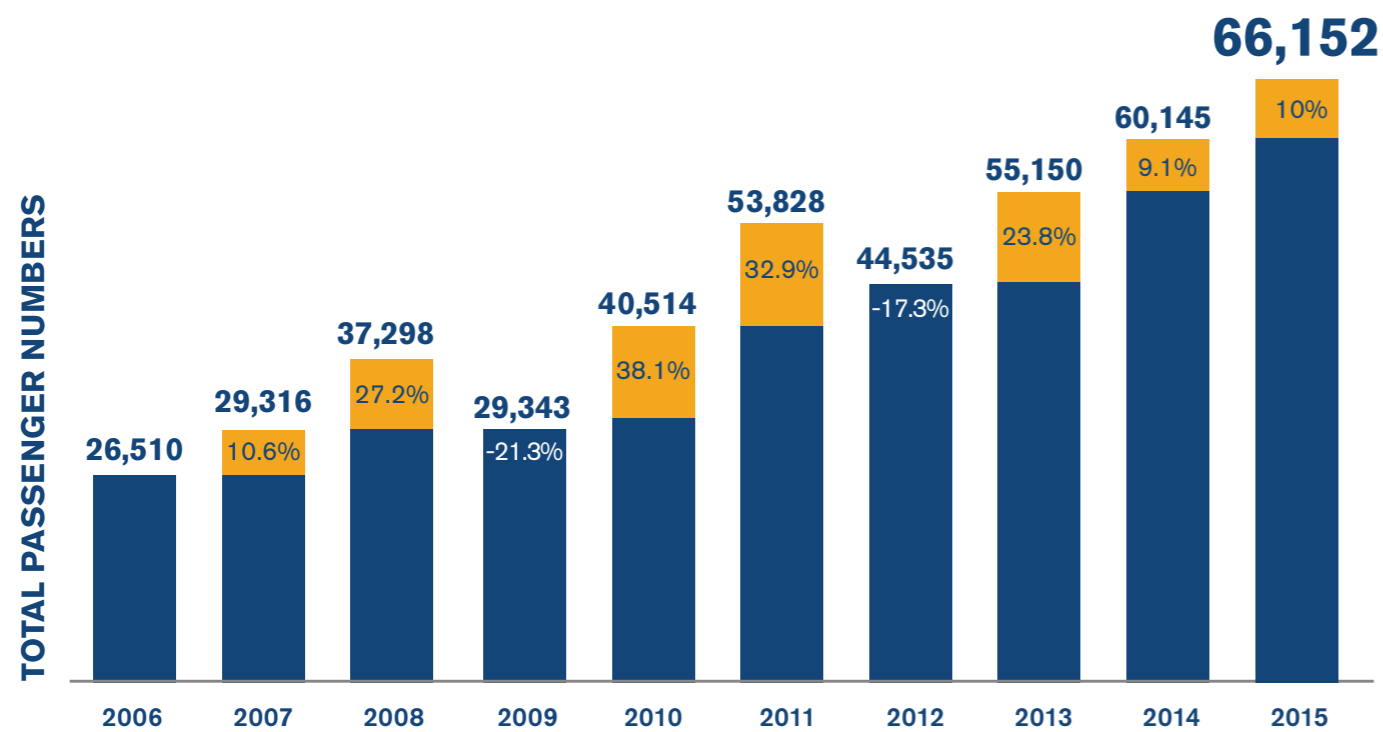
NEW ZEALAND HITS
66,152
OCEAN CRUISE PASSENGERS

TOTAL PASSENGERS

More New Zealanders than ever before cruised in 2015, with ocean cruise passenger numbers growing by 6007 to a record high of 66,152- an increase of 10%.

The New Zealand passenger market has now increased by almost 150 per cent since figures were first recorded 10 years ago, an annual average growth rate of 12.6 per cent.

To reach 100,000 ocean cruise passengers by 2020, the market now requires an average annual growth rate of 8.7 per cent over the next five years.



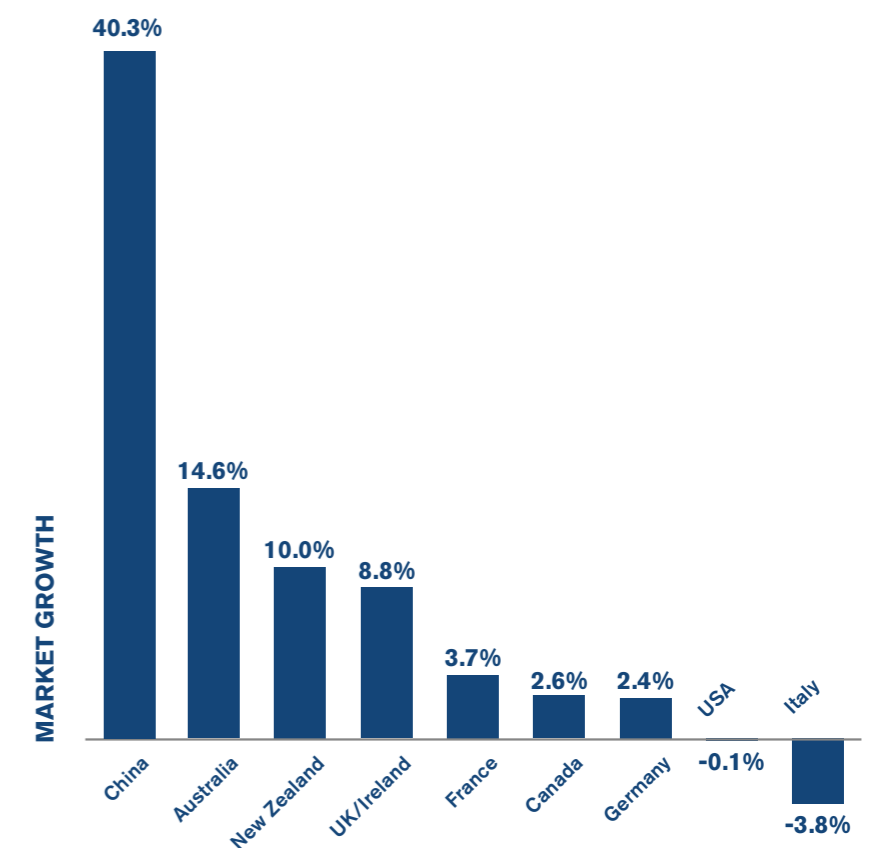
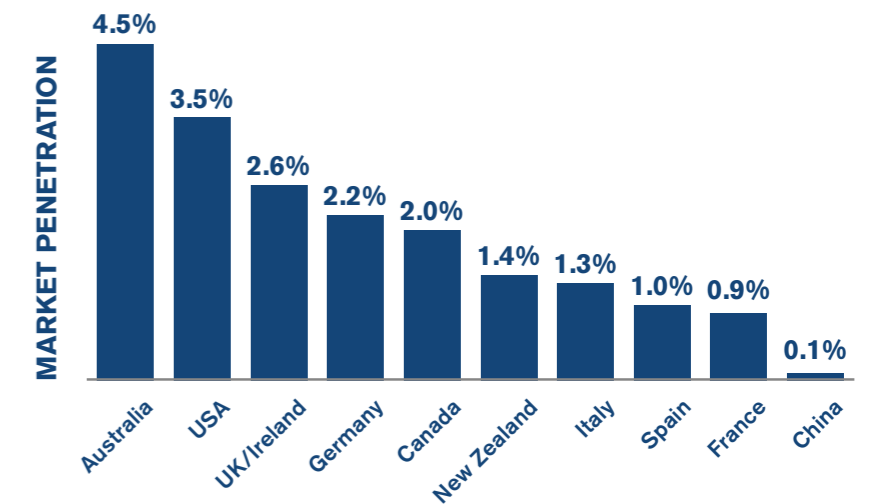
WORLD PERSPECTIVE

While New Zealand is still an emerging source market for cruise passengers and has a relatively small population, its performance in 2015 was impressive on the world stage.

The nation's growth rate of 10 per cent was stronger than the levels recorded by all key source markets except for Australia and China. Only the UK and Ireland came close with 8.8 per cent growth. The world's largest cruise market, the United States, retracted marginally by 0.1 per cent while passenger numbers in Italy fell by 3.8 per cent.

On par with 2014, the equivalent of 1.4 per cent of New Zealand's population took an ocean cruise, giving the nation a greater market penetration rate than many established cruise markets like Italy (1.3 per cent), Spain (1 per cent) and France (0.9 per cent).

With an ever-increasing array of ships cruising the region, and enticing itineraries continuing to draw travellers to oceans around the globe, the New Zealand passenger market is expected to continue on its growth trajectory.



KEY DESTINATIONS

With several ships cruising from Auckland throughout the year and more ships than ever offering trans-Tasman itineraries, cruising in local waters to the destinations of Australia, New Zealand and the South Pacific accounted for 54 per cent of cruise passengers in 2015.

The South Pacific continued to hold the most allure for Kiwi cruisers, attracting one third (21,496) of the nation's total ocean cruise passengers.

In response to new coastal cruise options to Australian regional ports and more short break itineraries, Australia experienced the strongest growth with passenger numbers rising 71 per cent from 4633 to 7938. Accounting for 12 per cent of the New Zealand cruise passenger market, Australia replaced New Zealand as the third most popular cruise destination in 2015.

An increase in fly-cruise destinations including Asia, Alaska and Europe also contributed to the market's growth.

Asia rose sharply in popularity with numbers up 64 per cent to 3750 while Alaska increased by a solid 16.3 per cent to 4559.

Europe remained the most popular long-haul destination, and the second most popular overall, attracting more than 12,500 Kiwis (19 per cent) for a cruise holiday last year – up 5 per cent on 2014 numbers.

Although the number of passengers travelling on New Zealand itineraries fell by 9 per cent, it ranked fourth on the destination list, with a 10 per cent share.

DESTINATION GROWTH

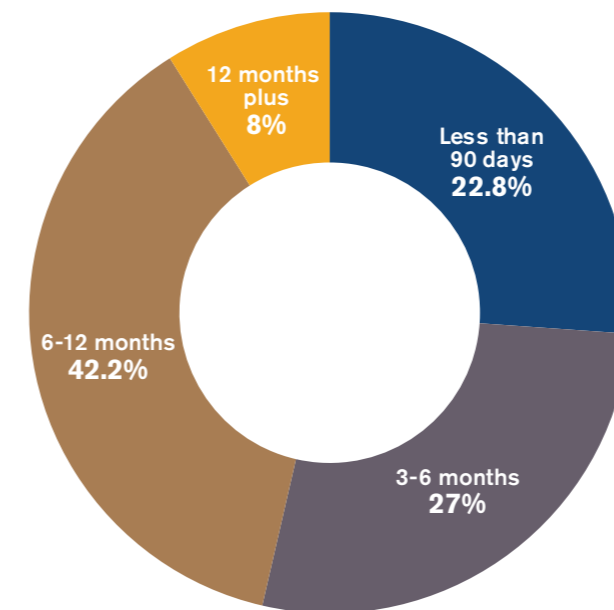
Cruise Region	2014	2015	Variance
Australia	4,633	7,938	71.3%
Asia	2,283	3,750	64.3%
Mexico	940	1,473	56.7%
Alaska	3,919	4,559	16.3%
Caribbean	3,204	3,697	15.4%
Northern Europe	2,484	2,770	11.5%
South Pacific	20,577	21,496	4.5%
Mediterranean	9,504	9,819	3.3%
New Zealand	7,519	6,812	-9.4%
Other Americas	2,085	1,798	-13.8%
World Voyages	1,251	932	-25.5%
Other Destinations	1,036	682	-34.2%
South America	710	426	-40%
TOTAL	60,145	66,152	10%

DEMOGRAPHICS

BOOKING PATTERNS

The majority (92 per cent) of New Zealanders booked their cruise holiday within 12 months of departure with half booking their trip within six months of sailing.

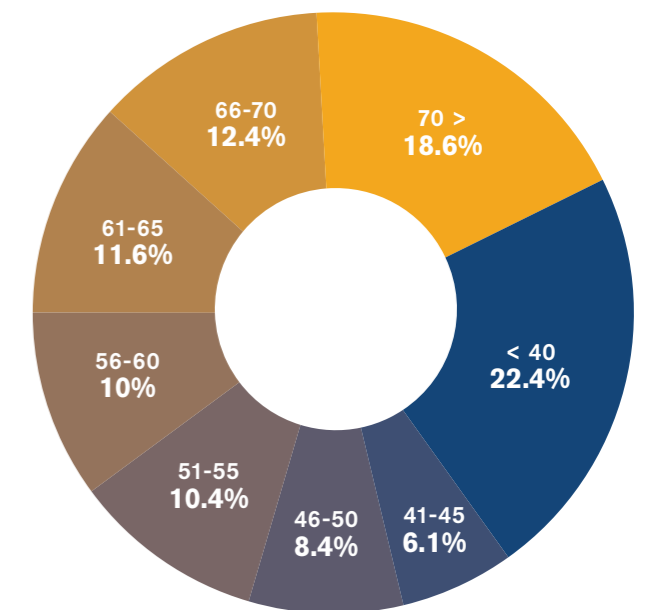
Most categories remained consistent from 2014, except for bookings made within 90 days of departure, which increased by 5.5 per cent.



PASSENGER AGE

The 2015 figures confirm that ocean cruising is a holiday which continues to appeal to New Zealanders of all ages.

About a fifth (22.4 per cent) of New Zealand cruisers were under the age of 40 and about a third (33.5 per cent) were aged over 65. The over-65 bracket decreased slightly (down 2.5 per cent) on 2014 numbers, while the under-40s grew (2.3 per cent).



CRUISE DURATION

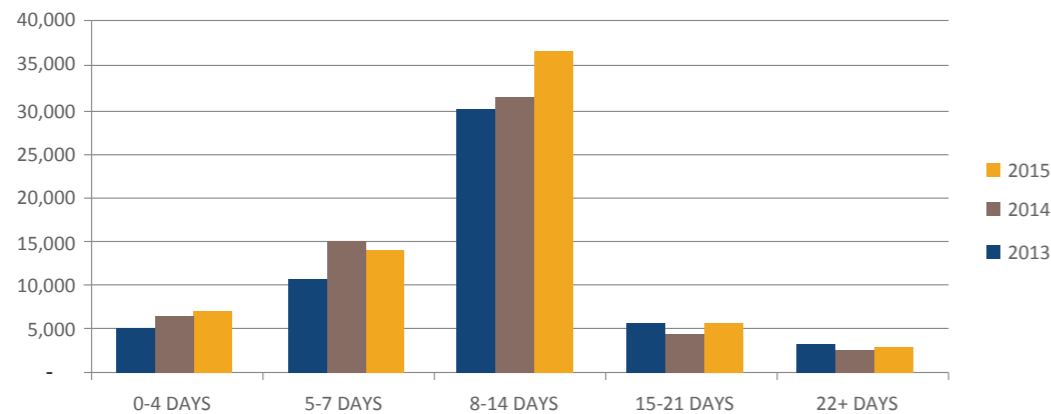
LENGTH OF CRUISE

The most popular cruise duration in 2015 was 8-14 days, with more than half of all passenger numbers (36,000) opting for this length.

Longer voyages of 15-21 days saw the biggest jump of 25 per cent reflecting an increase in destination-rich itineraries both close to home and abroad.

Cruises of 8-14 days increased by 17 per cent and short breaks of less than four days rose 8 per cent.

Overall, 76 per cent of New Zealand cruisers took a cruise of 14 days or less.

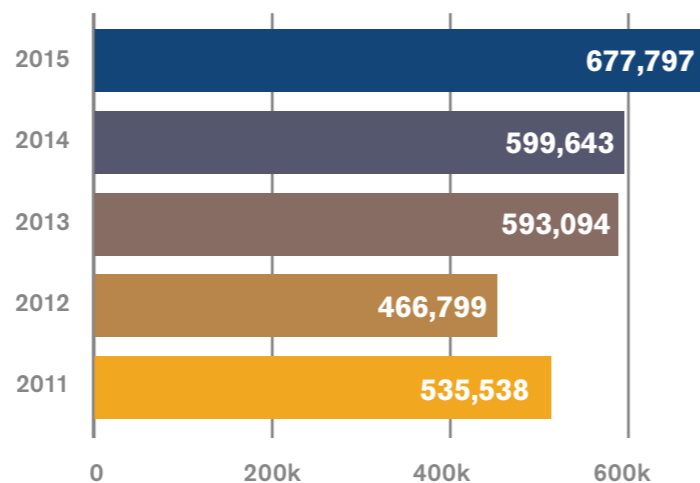


ESTIMATED SEA DAYS

New Zealand cruise passengers are estimated to have spent a record 677,797 days at sea in 2015 – an increase of 13 per cent on 2014.

The sea days figure, which results from an analysis of passenger numbers and cruise duration data, is an important gauge of the strength and growth of the market.

The average length of a cruise holiday for New Zealanders in 2015 was 10.25 days.



DEFINITION OF CRUISE REGIONS

Cruise region	Includes
ALASKA	All Alaska cruising
ASIA	South-East & North Asia Cruising
AUSTRALIA	Circumnavigations, Coastal cruising & sampler cruises
CARIBBEAN	Caribbean, Bahamas & Bermuda cruising Panama Canal crossings
MEDITERRANEAN	Eastern & Western Mediterranean Black Sea and Canary Islands
MEXICO	Mexican Riviera & Mexican Baja
NEW ZEALAND	New Zealand coastal and Trans-Tasman cruising
NORTHERN EUROPE	Norwegian Coast, Scandinavia, Baltic Region & North Sea British Isles & Atlantic coast of France/Spain/Portugal
OTHER AMERICAS	Hawaii cruising Eastern Canada & New England cruising
OTHER	Africa, Dubai, India, Middle East Antarctica cruising Trans Atlantic crossings
SOUTH AMERICA	South America cruising
SOUTH PACIFIC	South Pacific cruising & Trans-Pacific voyages
WORLD VOYAGES	All World cruise sectors



CRUISE LINE MEMBERS

- AIDA Cruises
- AMA Waterways
- Amadeus by Luftner
- American Cruise Lines
- American Queen Steamboat Co.
- APT Group
- Aqua Expeditions
- Avalon Waterways
- Azamara Club Cruises
- Carnival Cruise Line
- Celebrity Cruises
- Costa Cruise Lines
- Croisieres de France
- CroisiEurope River Cruises
- Cruise & Maritime Voyages
- Crystal Cruises
- Cunard
- Disney Cruise Line
- Emerald Waterways
- Evergreen Tours
- Hapag Lloyd Cruises
- Hebridean Island Cruises
- Holland America Line
- Island Cruises
- Lindblad Expeditions
- Louis Cruises
- MSC Cruises
- Norwegian Cruise Line
- Oceania Cruises
- P&O Cruises Australia
- P&O Cruises World Cruising
- Paul Gauguin Cruises
- Pearl Seas Cruises
- Ponant
- Princess Cruises
- Pullmantur
- Regent Seven Seas
- Riviera Travel
- Royal Caribbean International
- Saga
- Seabourn
- SeaDream Yacht Club
- Scenic
- Shearings Holiday
- Silversea Cruises
- St. Helena Line
- Star Cruises
- Swan Hellenic
- Tauck River Cruises
- Thomson Cruises
- Travelmarvel
- TUI Cruises
- Uniworld Boutique River Cruise Collection
- Voyages of Discovery
- Windstar Cruises

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