

CRUISE INDUSTRY SOURCE MARKET REPORT

New Zealand 2013



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CRUISE INDUSTRY
SOURCE MARKET REPORT
NEW ZEALAND 2013

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EXECUTIVE SUMMARY

The New Zealand cruise passenger market showed renewed buoyancy in 2013, with numbers soaring to an all-time high of 59,316 - a 23 per cent increase on 2012.

Over the past seven years, the number of New Zealand cruisers has more than doubled, with the market experiencing an annual average increase of 14 per cent.

While New Zealand is still a small source market on the world stage, its strong growth rate in 2013 is impressive, surpassing major cruise passenger markets such as Australia, North America and the United Kingdom.

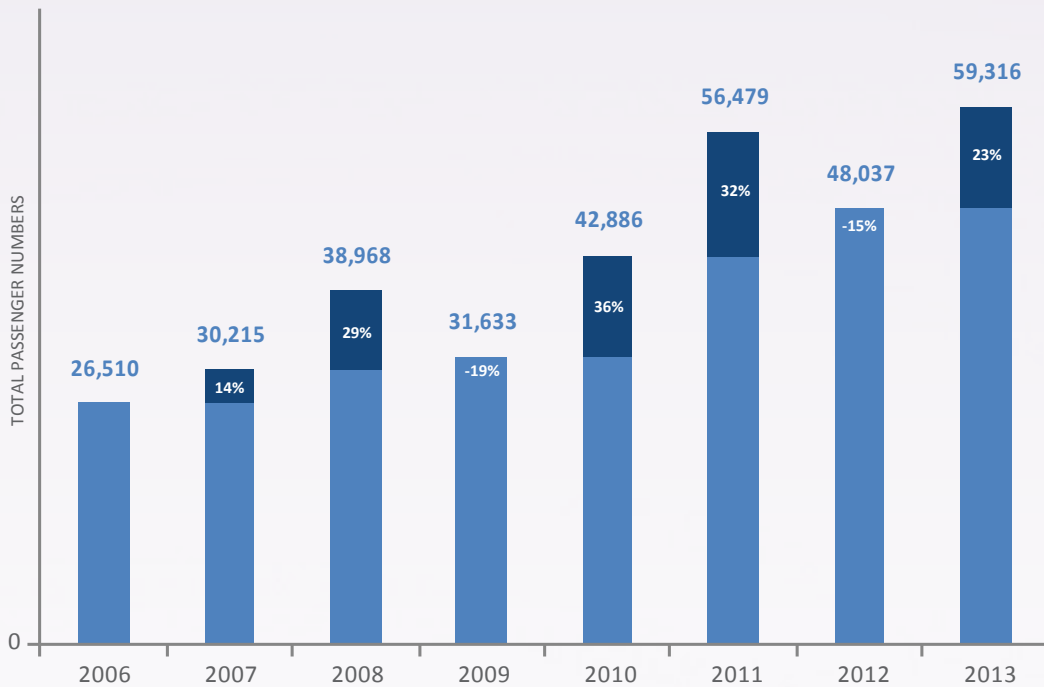
The record result has also driven an increase in the market penetration rate with the equivalent of 1.3 per cent of the New Zealand population taking a cruise in 2013, up 0.2 per cent from 2012.

With more cruise ship deployments on the horizon in the Australasian region and an expanding range of attractive cruise itineraries on offer in the Northern Hemisphere, New Zealand appears on course for future growth in its cruise passenger numbers.

Other key findings of the New Zealand 2013 Cruise Industry Source Market Report include:

- 2013 saw the second largest hike in passenger numbers since New Zealand passenger numbers were first compiled in 2006
- The South Pacific attracted the biggest proportion of New Zealand passengers (31 per cent) and also recorded the largest growth rate of any region, with numbers surging by 66 per cent
- Local cruising in the South Pacific, Australia and New Zealand collectively accounted for 53 per cent of all passengers
- The number of New Zealanders cruising European oceans continued to rise, reaching a record 11,435 passengers and accounting for 19 per cent of all cruisers
- River cruising broke the 4000 passenger mark for the first time to reach a new high of 4166, up 19 per cent
- Estimated days spent at sea by New Zealanders reached a record 656,000 in 2013 with the average length of a cruise holiday rising to 11.1 days
- Most New Zealanders opted for cruises of 8-14 days, with the number of voyages of this length growing by 27 per cent.

TOTAL PASSENGER NUMBERS



New Zealanders' interest in cruise holidays continues to grow, with passenger numbers surging 23 per cent in 2013 to reach a record 59,316.

The increase of more than 11,000 cruisers since 2012 represents the second largest annual hike since New Zealand passenger numbers were first compiled in 2006.

The New Zealand passenger market has now more than doubled in size in seven years, experiencing an average annual growth rate of 14 per cent over that period.

The 2013 result reflects strong growth in local cruising as well as international cruise holidays and reverses the decline experienced in 2012, which stemmed from a temporary reduction in local cruise capacity.



KEY DESTINATIONS

The warm waters of the South Pacific attracted the biggest number of New Zealand cruisers in 2013, with the region accounting for 31 per cent of passengers (18,257 cruisers). With a further 13 per cent (7,855) of New Zealanders choosing Australian itineraries and another 9 per cent (5,184) opting for New Zealand cruises, sailings in local waters accounted for a significant 53 per cent of all cruise holidays.

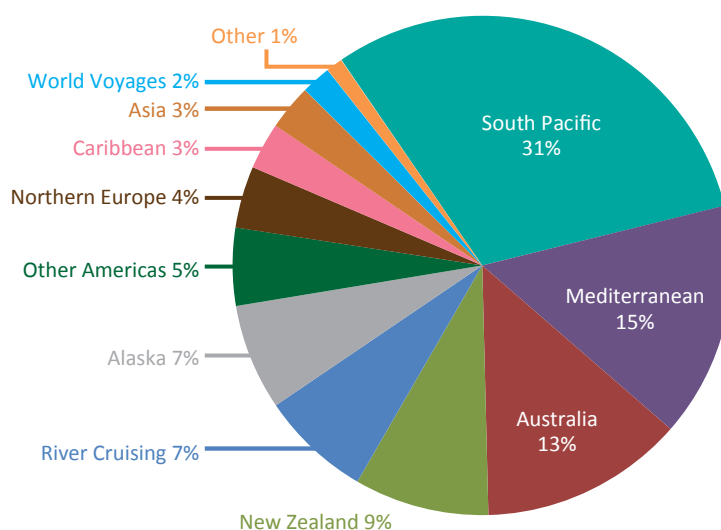
Europe remained the most popular long-haul destination attracting 19 per cent of passengers (11,435) in 2013, with the Mediterranean accounting for 15 per cent of total numbers and Northern Europe 4 per cent. River cruising, predominantly on European waterways, drew a record 7 per cent (4,166) of the market putting it on equal footing with Alaska (4,090).

In terms of growth, the Pacific was the stand-out performer, with numbers rising 66 per cent on the 2012 figures. Australian itineraries experienced an impressive 48 per cent increase while river cruising and Alaska both enjoyed a rise of 19 per cent.

DESTINATION GROWTH

DESTINATION	2012	2013	VARIANCE
South Pacific	11,024	18,257	65.6%
Australia	5,302	7,855	48.2%
Other Americas	2,466	2,990	21.2%
River Cruising	3,502	4,166	18.9%
Alaska	3,440	4,090	18.9%
Europe	10,617	11,435	7.7%
World Voyages	1,082	1,152	6.5%
Caribbean	1,792	1,800	0.4%
Other	668	642	-3.9%
Asia	1,911	1,745	-8.7%
New Zealand	6,233	5,184	-16.8%
Total	48,037	59,316	23%

DESTINATION SHARE*



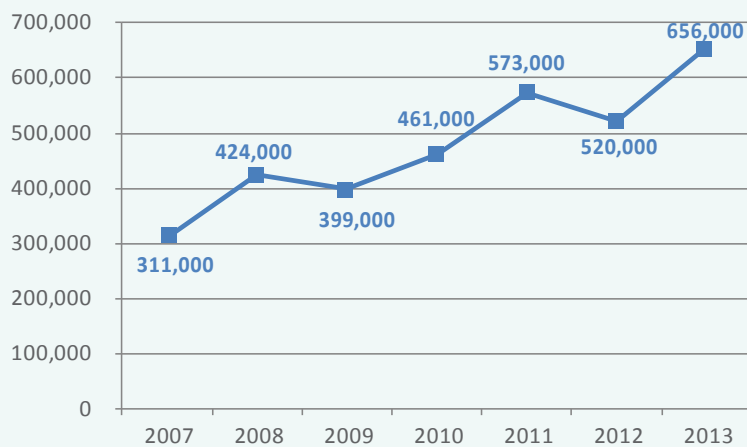
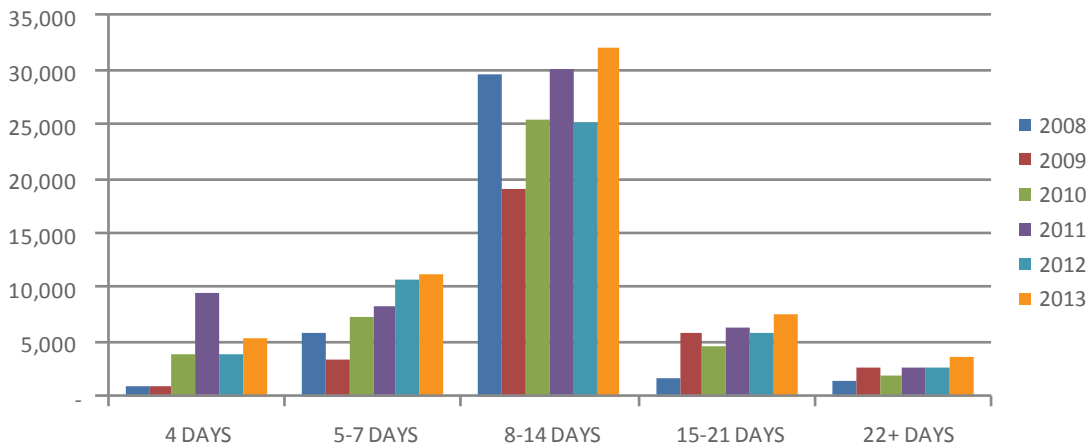
*See page 13 for definition of cruise destinations.

CRUISE DURATION

LENGTH OF CRUISE

More than half of all New Zealand cruisers (31,985 or 54 per cent) opted for a cruise of 8-14 days – a 27 per cent rise in passenger numbers for this category since 2012. This growth reflects the increasing number of South Pacific and local cruises on offer during the year as well as the tendency to choose cruises of this length in Alaska and Europe.

Meanwhile cruises of 5-7 days increased by 5 per cent to represent almost 19 per cent of voyages, while longer cruises of 15-21 days attracted 26 per cent more cruisers than in 2012 to account for more than 12 per cent of the market.



ESTIMATED SEA DAYS

New Zealand cruise passengers are estimated to have spent a record 656,000 days at sea in 2013 – an increase of 26 per cent over 2012.

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.

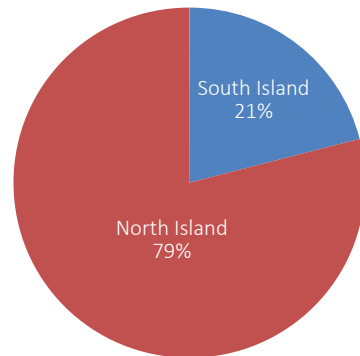
The average length of a cruise holiday for New Zealanders in 2013 was estimated at 11.1 days – an increase on last year's estimate of 10.8 days and notably higher than the global figure of just over seven days.



DEMOGRAPHICS

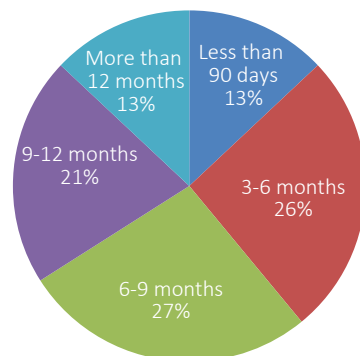
PASSENGER ORIGIN

The North Island represented 79 per cent of the New Zealand cruise passenger market in 2013, compared to the South Island's 21 per cent. These figures remain unchanged from 2012 and reflect the population spread across the two islands.



BOOKING PATTERNS

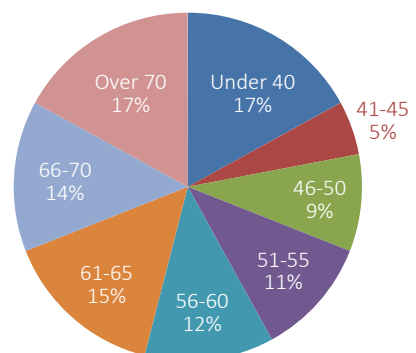
More than 60 per cent of all travellers booked their cruise at least six months before departure, with 34 per cent of bookings made at least nine months before travel. The number of passengers booking fewer than six months before their cruise fell slightly from 43 per cent in 2012 to 39 per cent in 2013, possibly indicating New Zealanders were more inclined to book well in advance to secure their holiday of choice.



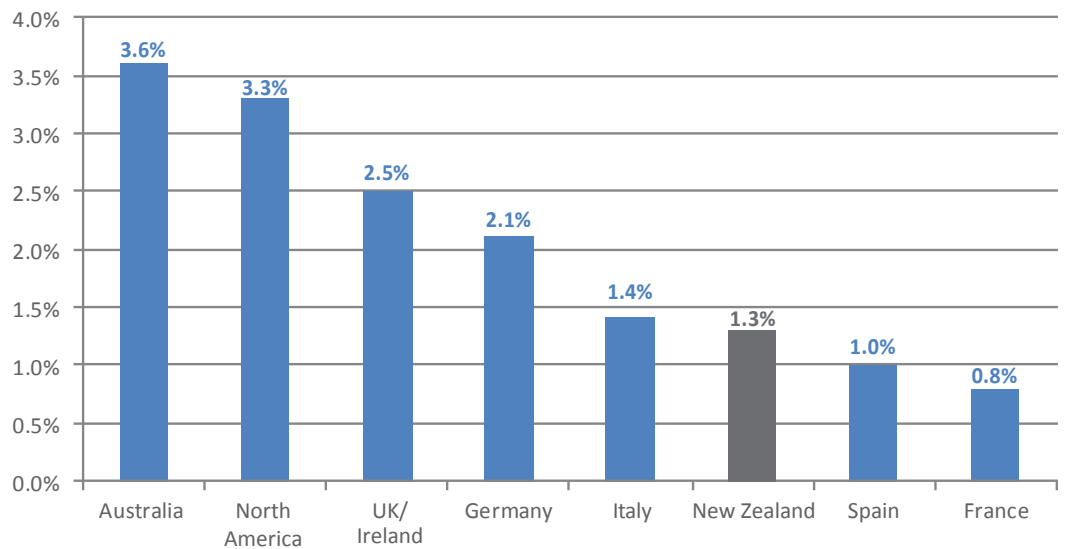
PASSENGER AGE

The 2013 Cruise Industry Source Market report confirms that cruising is a holiday which appeals to New Zealanders of all ages.

During the year, close to one-third of New Zealand cruise passengers were aged under 50 years, while around half were aged 51-70 years.



WORLD PERSPECTIVE



New Zealand v Major Cruise Market Penetration Rates

While New Zealand is still an emerging source market for cruise passengers, with a relatively small population, its performance in 2013 was impressive on the world stage.

The nation's growth rate of 23 per cent was stronger than the levels recorded by key source markets such as Australia (20 per cent), Germany (9 per cent), France (9 per cent) and North America (3 per cent).

New Zealand's 59,316 cruise passengers equated to 1.3 per cent of the population in 2013, up 0.2 per cent from 2012. This gives the country a market penetration close to Italy (1.4 per cent), while indicating there is still plenty of scope for growth to reach the penetration levels of Australia (3.6

per cent), North America (3.3 per cent) and the United Kingdom/Ireland (2.5 per cent).

With global cruise passengers now at 21.7 million, the outlook for the cruise industry is a positive one. Internationally, an ever-increasing array of ships and itineraries is drawing travellers to oceans and rivers around the globe, while closer to home a growing number of cruise ships are being based in Australasian waters introducing many local holidaymakers to the joys of cruising. In this environment, the New Zealand passenger market is expected to continue on a growth trajectory.

ABOUT

Cruise Lines International Association (CLIA) is the world's largest cruise industry trade association with representation in North and South America, Europe, Asia and Australasia. CLIA represents the interests of cruise lines, travel agents, port authorities and destinations, and various industry business partners before regulatory and legislative policy makers.

CLIA is heavily engaged in travel agent training, research and marketing communications to promote the value and desirability of cruise holidays with thousands of travel agency and travel agent members.

CLIA's Associate Member and Executive Partner programs include the industry's leading providers of supplies and services that help cruise lines provide a safe, environmentally friendly and enjoyable holiday experience for millions of passengers every year.

For more information on CLIA, the cruise industry, and CLIA members cruise lines and travel agencies, visit www.cruising.org.nz

DEFINITION OF CRUISE REGIONS

Cruise region reported	Includes
ALASKA	All Alaska cruising
OTHER AMERICAS	Hawaii cruising
	Eastern Canada and New England cruising
	Bermuda cruising
	Mexican Riviera and Baja
	South America cruising
CARIBBEAN	Caribbean and Bahamas
	Panama Canal crossings
ASIA	South-East and North Asia cruising
AUSTRALIA	Australian circumnavigations and coastal cruising
SOUTH PACIFIC	South Pacific cruising and Trans-Pacific crossings
NEW ZEALAND	New Zealand coastal and Trans-Tasman cruising
MEDITERRANEAN	Mediterranean (Eastern and Western)
	Black Sea and Canary Islands
NORTHERN EUROPE	British Isles
	Norway, Scandinavia and Baltic region
OTHER	Africa, India, UAE and Middle East Cruising
	Antarctica
	Trans-Atlantic crossing
WORLD VOYAGES	World Voyages
RIVER CRUISING	Europe river cruising
	Asia River Cruising
	Other river cruising

CRUISE LINE MEMBERS

APT	Oceania Cruises
AQUA Expeditions	P&O Cruises Australia
Avalon Waterways	P&O Cruises World Cruising
Azamara Club Cruises	Paul Gauguin Cruises
Carnival Cruise Lines	Princess Cruises
Celebrity Cruises	Regent Seven Seas Cruises
Compagnie du Ponant	Royal Caribbean Cruise Line
Costa Cruises	Scenic Tours
Crystal Cruises	Seabourn
Cunard Line	Silversea Cruises
Evergreen Tours	Star Cruises
Holland America Line	Travelmarvel
Hurtigruten	Un-Cruise Adventures
Lindblad Expeditions	Uniwold Boutique River Cruises
MSC Cruises	Windstar Cruises
Norwegian Cruise Line	



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