

# **PŌNEKE CRUISE EVOLUTION**

WELLINGTON REGIONAL CRUISE STRATEGY 2025

# EXECUTIVE SUMMARY

## Context and challenge

Wellington's cruise sector is at a pivotal crossroads. Cruise contributed around \$100 million to our economy in the 2023-24 season, yet ship visits are down 27% in 2024-25, our share of port calls is down from 11.6% to 8.4% and our position is under pressure from both national headwinds (high costs, complex regulation, perceptions of New Zealand) and local pressures (city disruption, infrastructure constraints, destination differentiation).

As cruise lines lock in their deployment decisions 18-24 months ahead and national stakeholders work collectively to arrest the national downturn, Wellington has a short window to act to support the national efforts, strengthen our market position and capture the significant economic opportunities available.

With a proactive approach, coordinated leadership and focused intervention, we can move from decline to growth and optimise the next upward trajectory of cruise growth in New Zealand.

## Vision and Opportunity

Our vision is for Wellington to become **an unmissable, premier cruise destination – a trusted partner for cruise lines, a distinctive capital city experience for passengers, and a valuable contributor to community prosperity.**

By achieving market share of 80-82% of ship visits and lifting average passenger economic contribution from \$585 to \$750 to match our peer destinations Wellington can grow cruise's regional economic impact from \$100 million to **\$180-200 million** annually.

## Critical Shifts Needed

Success depends on addressing key strategic shifts:

- **Unified Leadership and Governance** – Aligning CentrePort and WellingtonNZ through integrated governance and shared accountability.
- **Differentiation and Partnerships** – Building deeper cruise line relationships and positioning Wellington as a distinctive capital city port, not an interchangeable stop.
- **Value Capture and Experience** – Lifting passenger value, satisfaction and spend by improving journeys, products, signature experiences, and by exploring market segmentation opportunities.
- **Sustainable Balance** – Ensuring community backing and environmental leadership while growing cruise's overall contribution.

## Pathway and Priorities

Wellington's evolution will unfold through **three horizons**, with transitions based on readiness and capability rather than rigid timeframes:

- **Horizon 1: Reset & Act** – Unifying leadership, fixing bottlenecks, and strengthening partnerships.
- **Horizon 2: Differentiate & Grow** - Developing more distinctive products, expanding regional opportunities, and driving economic value.
- **Horizon 3: Lead & Optimise** - Cementing premier destination status through innovation, continuous improvement, and community support.

Progress will be driven by focus on **four integrated priorities**:

1. **Strategic Growth & Partnerships** – Shifting cruise line relationships from transactions to long-term value partnerships.
2. **Visitor Value & Distinctiveness** – Optimising passenger journeys while developing Wellington's unique capital-city and innovation story.
3. **Seamless Operations & Capability** – Resolving passenger movement bottlenecks and coordinating across stakeholders.
4. **Sustainable Prosperity & Balance** – Building community understanding and leveraging environmental opportunities.

## **Outcomes**

The strategy aims to deliver measurable results through the following outcomes:

- **Unify leadership and governance** between CentrePort and WellingtonNZ
- **Lift passenger value** to \$750 and total regional impact of \$180–200m annually
- **Secure premier destination status** with 80%+ of ship visits and 120–135 port calls
- **Maintain community wellbeing** with 90%+ support and visible environmental leadership

## **Time for action**

The opportunity is clear – Wellington must act decisively now and sustain action moving forward. By aligning leadership, building trusted partnerships, and sharpening our value we can reverse decline, unlock growth and establish Wellington as a premier cruise destination in New Zealand.

# STRATEGY ON A PAGE

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### VISION

Wellington is the unmissable, premier cruise destination: a trusted partner for cruise lines, a distinctive capital city experience for passengers, and a valuable contributor to community prosperity.

### PATHWAY



### PRIORITIES

#### Strategic Growth & Partnership Excellence

- Establishing the leadership and relationships that drive everything else.*
- Create unified governance
  - Champion a shared narrative
  - Evolve cruise line relationships

#### Visitor Value & Destination Distinctiveness

- Creating experiences that amplify value and showcase our unique identity.*
- Increase visitor value
  - Develop distinctive product & position
  - Expand regional opportunity

#### Seamless Operations & Capability

- Building the systems and skills that deliver consistently excellent outcomes.*
- Strengthen operations
  - Build system-wide capability
  - Enable effective integration

#### Sustainable Prosperity & Balance

- Optimising economic, environmental & social outcomes for enduring success.*
- Support business vitality
  - Respect environmental commitments
  - Enhance community wellbeing

### OUTCOMES

#### Unified Leadership & Governance

- Integrated governance structure
- Established port/ destination partnership

#### Enhanced Economic Value

- \$1.80m-200m economic benefit
- 9.0 passenger satisfaction ratings

#### Premier Destination Status

- 80%+ of NZ voyages
- 120-135 port calls

#### Community Wellbeing

- 90%+ community support
- Enhanced sustainability and conservation understanding