

Tairāwhiti Cruise Development Pathway

Observations, Insights and Direction





Ara Moana

Our Ara Moana tohu speaks to our relationship with Tangaroa and Hine Moana. Our path to the sea, and the path our tipuna took to arrive here. These patterns are also representative of the strength of our wahine here on the east coast, based on traditional weaving patterns ara moana talks about the interweaving of our rich kōrero, whakapapa and mātauranga that emanate from our home here in Te Tairāwhiti.

 Ara Moana Tohu Design
MAIA GIBBS ARTS



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Executive summary

Cruise tourism is a rapidly expanding sector of global travel, with cruise capacity projected to grow by at least 10% by 2028. In New Zealand, cruise tourism has made a substantial contribution to the economy, rebounding quickly post-COVID and delivering an estimated \$1.37 billion in total economic output including direct expenditure worth \$637.8 million in 2023-24. With a long-term goal of reaching \$1 billion of direct expenditure by 2040, cruise tourism in New Zealand presents a significant opportunity for regional growth.

Aligned with the Tairāwhiti Economic Plan this Cruise Development Pathway explores cruise as a key pillar for future development, offering a strong potential for economic and cultural gains for the region.

Tairāwhiti Gisborne, with its well-positioned port suitable for smaller and medium-sized vessels, has untapped potential to attract more cruise traffic. While there is some uncertainty around tendering for medium-sized ships, the welcoming community, and current offerings - though not yet widely differentiated - can be leveraged to create a distinctive and appealing cruise destination. The region's rich history, heritage, and Māori culture provide strong opportunities to appeal to passengers seeking unique and immersive experiences.

Our vision is to establish Tairāwhiti Gisborne as an attractive cruise destination, celebrated for its unique cultural offerings, smooth operations, and welcoming atmosphere.

This vision aims to deliver sustained economic and community benefits while offering visitors an authentic experience of Tairāwhiti culture.

We have adopted a phased, ten-year development pathway that begins with building a strong foundation, is reinforced by targeted investment for growth, and continues with the refinement and realisation of long-term benefits.

The Cruise Development Pathway is built around three interrelated priorities:

Priority 1

Cruise Line Attraction

Strengthening relationships with cruise lines and influencers to position Tairāwhiti as an appealing destination and provide compelling reasons for ships to visit and return.

Priority 2

Unique & Distinctive Offering

Developing a differentiating market position supported by cultural and product offerings that reflect the unique heritage of the region.

Priority 3

Optimising for Visitor Experience

Enhancing operational efficiency and improving the visitor experience to make the region a standout destination.

Our aim is to attract cruise ships and visitors that are well-matched to the region's offerings and unique way of life, while fostering collaboration and activating mutual benefits for both the community and cruise operators.

This Cruise Development Pathway ultimately prioritises the community, ensuring that both people and place benefit from the long-term growth of cruise tourism.

Tairāwhiti Cruise Development Pathway



Vision 2034

An attractive cruise destination, known for its unique offerings, seamless operations, and welcoming spirit, where visitors experience genuine regional culture, while the region enjoys sustained economic and community benefits.

VISION PATHWAY

Year 1 to 2

- ▶ Develop a strong foundation

Year 3 to 6

- ▶ Invest for future growth

Year 7 to 10

- ▶ Refine and realise benefits

VALUE PROPOSITION

How we add value

Visitors



A welcoming, authentic and distinctive regional New Zealand experience for curious cruise passengers who seek something real, yet beyond ordinary.

Cruise Lines



A viable, value-driven and welcoming port call for North Island and New Zealand itineraries that will exceed passenger expectations.

OUTCOMES

How we aim to achieve



Community

Social and economic benefits for the community including increasing cruise related revenue, increased vibrancy and pride of place, increase in activation of infrastructure, enhancing not detracting from the local way of life.



Continuity

An increase in frequency of cruise ships that enables more continuity in planning, resourcing and increased opportunity and benefits for more of the community.



Unity

Elevation in Māori engagement for reciprocal benefit, increased collaboration to enable better delivery for cruise passengers, increased stakeholder engagement and communication, and stronger social license for cruise.

PRINCIPLES

How we achieve



Working together



Improving over time



Protecting our character

STRATEGIC PRIORITIES

Key actions

Priority 1



Cruise Line Attraction

- ▶ Proactively engage target cruise lines and channels.
- ▶ Implement attractive pricing and incentives.

Priority 2



Unique & Distinctive Offering

- ▶ Establish a distinctive positioning.
- ▶ Enhance & expand products and experiences.
- ▶ Stimulate Māori engagement & product development.

Priority 3



Optimising for Visitor Experience

- ▶ Deliver continuous operational enhancement.
- ▶ Map and improve the visitor journey.
- ▶ Actively engage stakeholders and community.

1 

Introduction

Background

Cruise has rebounded globally faster than any other area of tourism with 2023 passenger volumes at 107% of those in 2019 and long-term growth in global cruise capacity anticipated. New Zealand also experienced exceptional growth in 2023-24 with 1011 port calls from 54 ships representing 1.55 million passenger visit days and direct expenditure estimated at \$637.8 million across the regions. While a decrease is forecast and expected over the next two to three years the long-term outlook anticipates a return to growth.

For Tairāwhiti Gisborne region, after a period of steady growth over the past decade, cruise now makes a significant contribution to the region's international visitation through approximately 20 to 25 port calls.

With long-term consumer demand for New Zealand as a cruise destination remaining strong, the recent completion of Wharf 7 at Eastland Port, and a desire to fuel further tourism growth with cruise as a catalyst, key stakeholders in the Tairāwhiti region have identified an opportunity to leverage the long term growth of the cruise market. This will be achieved through a coordinated and aligned regional cruise strategy that will provide direction and focus to the region's efforts over the next ten years.

Purpose

The purpose of the strategy is to:

- Leverage the long-term potential of the expanding cruise market
- Align stakeholders on the long-term direction for cruise and near-term actions required
- Identify the priority areas of focus and effort to achieve target outcomes
- Position Tairāwhiti as a leading destination in New Zealand for cruise experiences
- Contribute to the growth and sustainability of the region's tourism sector.

Approach

This cruise strategy has been developed by Trust Tairāwhiti in partnership with key stakeholders from the Tairāwhiti visitor economy in particular Eastland Port and Gisborne District Council.

After a review of relevant industry documents and analysis of sector and market trends, national and regional visitation data, and future forecasts, a series of interviews was conducted to inform the strategy. We are grateful to those representatives from industry and regional stakeholders that contributed their time and knowledge including Trust Tairāwhiti, Eastland Port, Gisborne District Council, iSite, Chamber of Commerce, iwi, hapū, cruise ground handler, cruise co-ordinator, inbound tour operators, local tourism operators, a selection of cruise lines and New Zealand Cruise Association.

The overall direction was shared with the community at the 2024 Tairāwhiti Cruise Summit with a survey to the wider community seeking input on the future of cruise in the region.

The final strategy document has been created with valuable input from key stakeholders over several iterations.

2

Situation

2.1 Cruise Context

Global

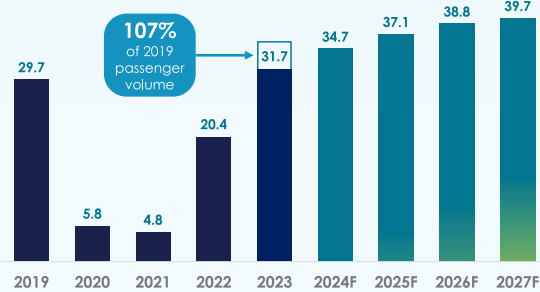
The economic contribution from cruise to the global economy is substantial, despite cruise being just 2% of international travel. In 2022 cruise generated \$138 billion in total economic impact globally, supporting 1.2 million jobs worldwide and \$43 billion in wages, with a significant increase anticipated for 2023.¹ Cruise tourism is one of the fastest growing sectors of tourism rebounding post-COVID faster than wider

international tourism arrivals, with cruise passenger volumes reaching 107% of 2019 levels in 2023 with 31.7 million passengers sailing.²

Growth in global cruise capacity is expected to be at least 10% from 2024 to 2028³ and the global cruise tourism market size is expected to grow from USD \$7.4 billion in 2023 to USD \$22.6 billion by 2033.⁴

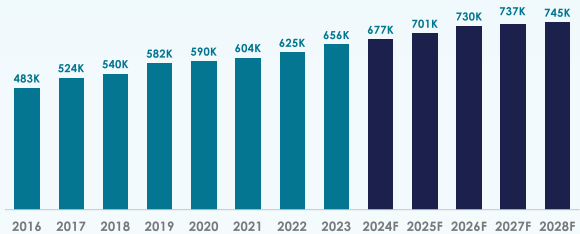
History and Forecast of Ocean - going Cruise Passengers

(amounts in millions)



Global cruise capacity is forecast to grow at least 10% from 2024 - 2028

Cruise capacity projections



Globally, cruise is a growth market overall from both demand and supply perspectives.⁵

Of all cruise ships being built until 2028, very large ships (3000 passengers plus) and luxury/ expedition ships have the highest growth rates. Of 89 cruise ships coming online during 2021 to 2028, almost 60% are less than 1000 passengers.⁶

When considering this global fleet growth by vessel length, 67% are more than 200m, with 33% less than 180m, indicating a trend to build larger vessels even in the luxury market where passenger numbers are typically lower.

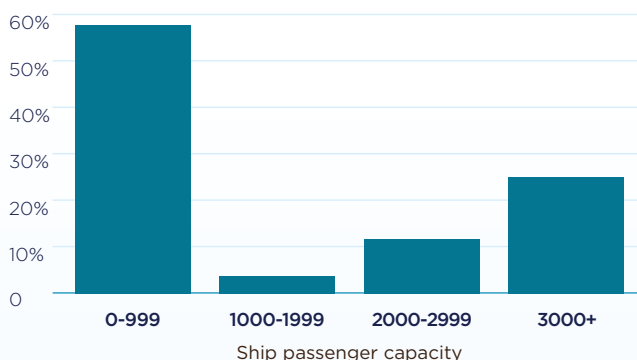
Insight

Luxury and expedition ships are rapidly increasing due to high customer demand and possibly better margins, while mid-market ship growth has slowed.

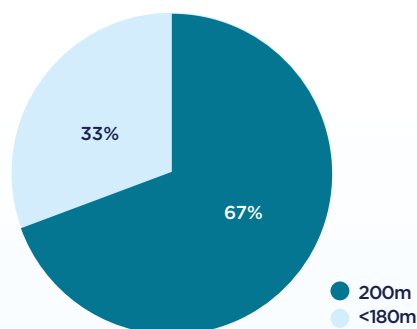
1 Source: 2024 CLIA State of the Industry Report
 2 Source: CLIA
 3 Source: CLIA

4 Source: yahoo!finance
 5 Source: CLIA
 6 Source: cruisemapper.com

Growth in global cruise ship capacity 2021-28



Growth in global cruise ship capacity 2021-28



Global Cruise Trends

- **Younger generations are the future of cruise** with gen x and millennials growing at a faster rate than boomers. The average age of cruisers is now 46.5. (Noting overall the 50+ market in general still dominates).⁷
- **Cruise holidays appeal to those looking for multi-generational travel options.** Today 73% of cruise travellers are sailing with family members that represent at least two generations.⁸
- **The number of accessible cabins across the cruise line fleet is increasing.** This is helping to meet the needs of cruise travellers who have limited mobility, many of which say they view a cruise holiday as the only travel option that meets their needs.⁹
- **The luxury and expedition markets are growing** and cruise passengers are booking longer and more premium than previously. The number of passengers sailing on expedition cruises more than doubled from 2016 to 2022.¹⁰ Source: CLIA. (Note: MSC predict fewer smaller vessels but growth of mid-size luxury ships to account for tech. inclusions)¹¹
- **Travelling to destinations for deeper connections, meaningful experiences** and more immersive travel. Expert, exclusive, unique, and local are key factors passengers seek especially for luxury and expedition tours.¹²
- **Shorex quality is a priority** (especially for luxury cruise brands): unique, high standard, matching on board service. Creating destination specific surprise and delight at key moments of the journey helps discovery of the destination. Increasingly immersive experiences both on shore and on ship are required to compete with land-based holidays. Helping passengers seamlessly connect through onshore activities can also increase cruise frequency.¹³
- **Social media and referrals playing a significant role in attracting new cruisers.** Word-of-Mouth recommendations are increasingly important, highlighting the importance of being remarkable as a destination.¹⁴
- **Environmental technologies and practices on cruise ships are accelerating** as the industry pursues zero net carbon cruising by 2050. Cruise lines are increasingly offering environmental education and sustainable tour experiences for passengers. As a result, 84% of cruise travellers are more aware of the responsible nature of cruise travel and the importance of the environment.¹⁵
- **Commitment of cruise passengers to the environment is on the rise** with 50% more passengers committed to making decisions based on environmental impacts than three years ago.¹⁶

7 Source: CLIA

8 Source: CLIA

9 Source: CLIA

10 Source: CLIA

11 Source: Sea Trade 2024

12 Source: CLIA

13 Source: Cruise Trade News & Sea Trade 2024

14 Source: Cruise Trade News & Sea Trade 2024

15 Source: CLIA

16 Source: CLIA

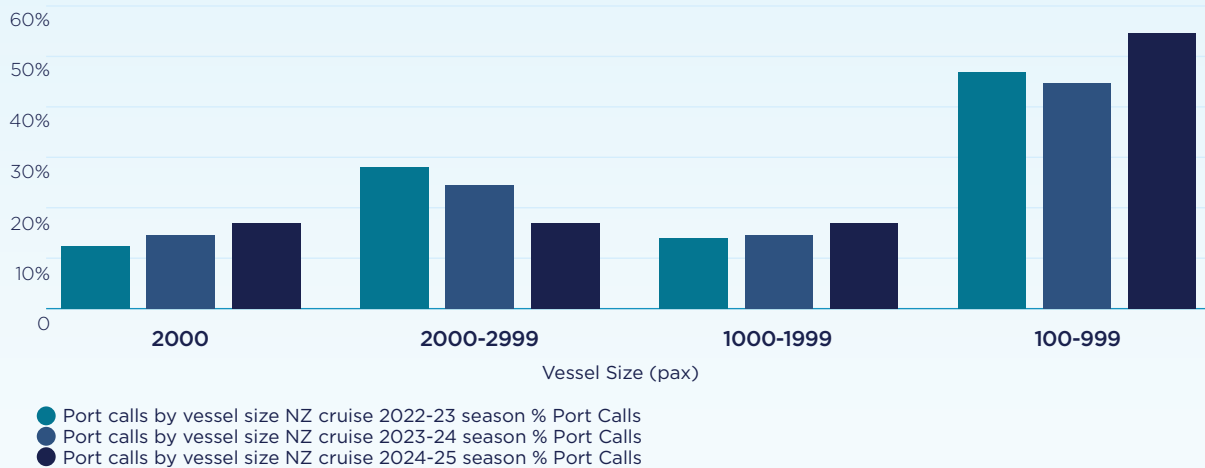
New Zealand

Cruise tourism provides an essential economic impact throughout many New Zealand regions for a variety of local businesses including tour operators, attractions, transport providers, retailers, restaurants and bars, travel agents, and hotels, while also supporting an extensive local supply chain.

Prior to COVID the 2018-19 contribution from cruise tourism was \$569.8m from 322,000 passengers. Post-COVID travellers re-embraced cruise holidays globally and growth has effectively picked up where it left off in 2019 with visits to New Zealand also reflecting that growth trajectory, until recently.

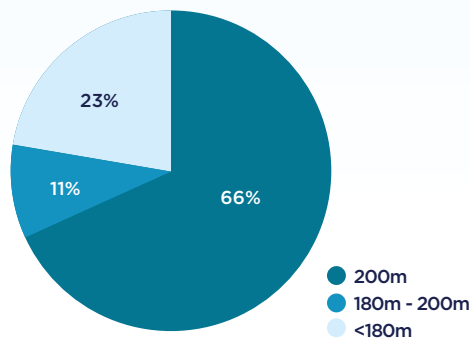
Despite the damaging weather events of the 2022-23 season, cruise still delivered around 80% of pre-COVID numbers. There was significant growth in 2023-24 with 54 ships carrying approximately 73,000 passengers and 34,000 crew on 1011 port visits, with an estimated total value of \$1.37 billion¹⁷. (Notably, 48% of those port visits were from ships with less than 1000 passengers, a proportion set to increase to 54% of port visits in 2024-25. By comparison, in the 2024-25 season 66% of cruise ships coming to New Zealand are 200m or longer, with 34% less than 200m.)

% of NZ Port Calls by vessel size



Insight
 Aligned with ship capacity growth, a higher and growing proportion of ships visiting New Zealand carry less than 1000 passengers. However, most ships are larger than 200m with 34% being less than 200m and potentially able to berth in Gisborne.

Growth in global cruise ship capacity 2021-28



¹⁷ Source: Economic Impact Assessment of Cruise Tourism in New Zealand, 2023-24, CLIA & NZCA

Recent macro factors such as geopolitical tensions, adverse foreign exchange impacts, rising fuel costs, and the slow return of Chinese travellers, along with micro factors like increasing costs and regulatory requirements in New Zealand, are forecasted to significantly impact the 2024-25 season with a 15-20% decrease in port calls and a 20% reduction in visitors.

A similar further decline is projected for the 2025-26 season (approximately 10 to 20%)¹⁸ and indications are the 2026-27 season may be similarly impacted.

Despite New Zealand's appeal and overall high passenger ratings, distance from Northern Hemisphere home ports, high overall costs, and stringent regulations impact profitability and viability for cruise lines.

Indications from Inbound Tour Operators (ITO's) and cruise lines suggest a recovery for New Zealand is likely to occur at some point, but timing is unclear and positive changes are required to make the destination more attractive. For example, a solution for hull cleaning in New Zealand to meet MPI regulations would make an immediate positive difference - but it would take two years for that positive change to be reflected in a lift in scheduled port bookings.

¹⁸ Source: New Zealand Cruise Association; ISS Mackay Shipping



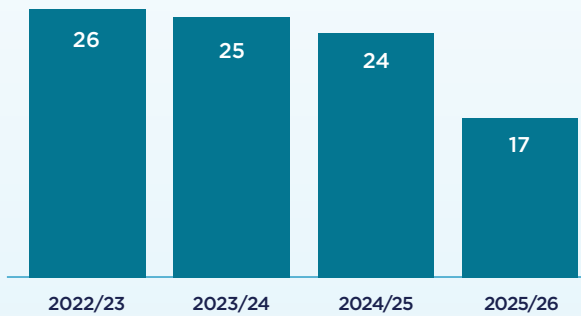
Tairāwhiti Gisborne

Tairāwhiti region international visitor spend has rebounded post-COVID increasing 19% from 2019, contributing around \$36m (of \$233m domestic/ international combined).¹⁹

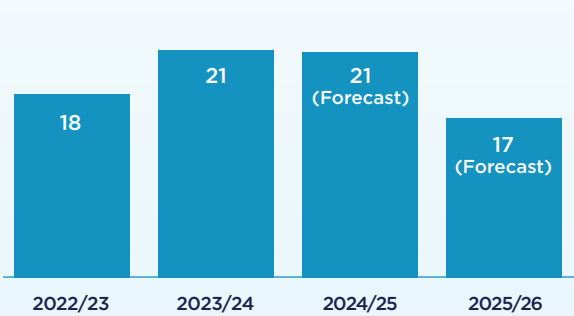
Steady growth, headwinds coming

For cruise tourism, after a period of steady growth over the past decade, it has recently made a significant contribution to the region's international visitation through approximately 20 to 25 port calls, and up to 11,000 visitors²⁰ with an estimated total economic contribution of approximately \$5 million²¹. Scheduled and actual (after cancellations) port calls to Gisborne have been steady over the past two seasons and are holding up for the coming 2024-25 season with 21 actuals currently forecast following three recent cancellations. However, the 2025-26 season schedule, while not fully confirmed, currently shows a 23% reduction for Gisborne to 17 bookings indicating national headwinds may soon impact the region. It is also worth noting that 11 of those bookings are from one cruise line - Silversea - representing a risk if they were to cancel or change ports.

Gisborne Scheduled Cruise port calls



Gisborne Actual Cruise port calls



For the 2024-25 season 71% of port calls are repeat visits from ships while 29% of port calls are new²². Repeat visitation is an indication of confidence (or convenience) from previously visiting cruise lines and new cruise lines visiting indicates the need to enhance an existing itinerary, make an additional stop and may also reflect a positive regional reputation. Previous repeat visiting cruise lines, Nat Geo and Ponant, are notably absent from 2025-26 bookings in Gisborne. Port agents ISS Mackay advises Ponant are focusing on Antarctic and sub-Antarctic destinations for higher margins.

The cruise route opportunity

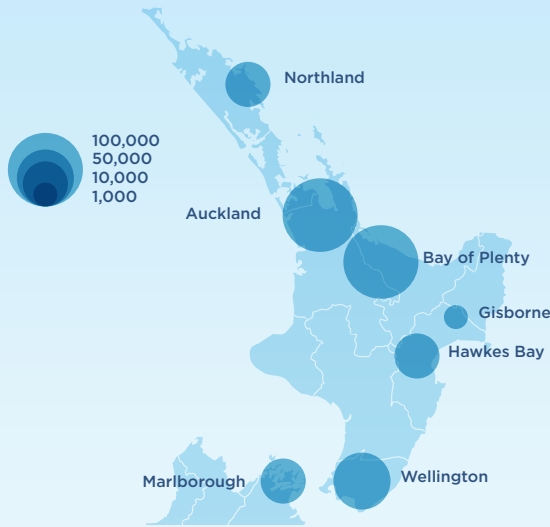
While Gisborne's port is on the typical cruise route down the east coast of the North Island it has historically attracted a relatively small percentage of cruise ships especially compared to neighbouring Port Napier.

However, given its convenient geographical location about 70% of the way from Tauranga to Napier (heading south), it provides a logical, and therefore attractive, option for smaller and luxury expedition ships that have slower sailing speeds of around 12 to 16 knots and are seeking port density on longer itineraries. Sailing Tauranga to Napier requires a higher speed run for all ships, meaning an increase in fuel costs. Stopping at Gisborne means shorter passage time at sea and more time in each port, providing a higher quality experience for their guests. For medium and larger ships this is less of an issue as they don't seek port density and typically include 6 to 7 New Zealand ports in a 12-to-14-day itinerary. Holland America Line has used Gisborne port over the last 3 years to provide some itinerary diversity between ships (especially Noordam and Westerdam).

19 Source: Year-end Oct 2023 MRTes, MBIE
20 Source: Eastland Port cruise schedule

21 Source: Estimated from Economic Impact Assessment of Cruise Tourism in New Zealand, 2023-24, CLIA & NZCA (Based on average economic value of \$233k per call.)
22 Source: Eastland Port cruise schedule

Cruise ship unique passengers by region visited, year ending June 2019



This was especially true post-COVID when the Asia market was slow to open for cruise. However, tendering their ships in Gisborne creates uncertainty in certain weather conditions, and uncertainty is a barrier.

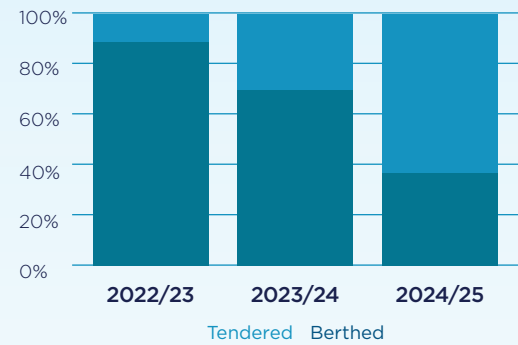
Tendering uncertainty

Cruise ships use a traffic light scoring system, and currently, Gisborne scores 7.5 with Carnival’s Holland America Line and 7.2 with their luxury brand, Seabourn. By comparison, Gibraltar scores 8.8. A score of 7.5 or below is considered ‘red’, meaning ships are unlikely to return. These ratings are influenced by factors such as the marine environment, weather, port services, shore excursions, community welcome, and, critically, uncertainty—something cruise lines avoid. Gisborne’s open anchorage to the southerly swell impacts its score, and due to this, Carnival’s Princess Line is unlikely to return. Holland America Line may also reduce future visits.

As a tender port, Gisborne has historically faced high cancellation rates, with 31% of calls cancelled in the 2022-23 season due to unfavourable weather, frustrating local businesses that prepared for visitors. However, cancellations dropped to 16% in 2023-24, thanks to the redevelopment of Wharf 7, allowing more ships to berth. In 2024-25, 63% of scheduled ships may berth, but only 2 of 17 are expected to do so in the 2025-26 season, increasing cancellation risks once again.²³

While berthing is preferred, only ships up to 200m can berth in Gisborne, and adverse weather, like strong winds, can make berthing difficult for taller vessels. Some luxury ships, like Silversea, are more than 200m and still need to tender. Although cruise lines prefer berthing, tendering is not necessarily a dealbreaker. For instance, the Bay of Islands, which handles around 90 ships per season, is entirely a tender port. Gisborne has a well-equipped tender pier and accessible landing area, and with good weather and smooth processes, could accommodate more tendering.

Proportions of berths vs tenders 22/23 to 24/25



An appealing region

Tairāwhiti Gisborne is perceived to be an exceptionally welcoming and friendly region, with a level of authenticity that is apparently harder to come by in other places and is likely related to the unique and special way of life in the region. Visitors enjoy the ‘realness’ and want to learn more about what makes the region different, special, and interesting. Being first to see the sun is also recognised as somewhat special – although it is shared with other places such as Kiribati. When combined with Māori significance, it can be more unique to the region and potentially more powerful (see Appendix 2). First to see the sun is not currently well leveraged for cruise passengers with little signage, marketing material, storytelling or experience-based activities highlighting this feature.

²³ Source: Eastland Port cruise schedule

Limited, but attractive products

Tourism product in the region is currently limited for cruise visitors creating a capacity challenge for vessels with more than 1000 passengers. For example, this season, Holland America Noordam visits to Gisborne engaged an average 517 passengers per call in shore experiences. By comparison, Holland America sister ship visits in Bay of Islands (also a small regional tender port) engaged an average of 690 passengers per call in shore experiences²⁴. Nonetheless, the experiences that are offered in Tairāwhiti Gisborne are considered strong and appealing; especially Dive Tatapouri Stingrays, Eastwoodhill Arboretum, the Steam Train Adventure, Gisborne Farm Adventures and Gisborne Winery Tours in addition to Cycling Tours and Town and Coastal Drive. The steam train remains vitally important to the region's offering for both uniqueness and capacity for cruise visitors. While it doesn't necessarily represent the essence of the region, ensuring it is retained, presented, and delivered in the best possible way as a visitor experience is an important foundation to the region's offering.

Port Location - Gisborne, New Zealand

| Average overall rating | Holland American Line |
|--------------------------------|-----------------------|
| Gisborne Farm Adventures | 5.00 |
| Gisborne Steam Train Adventure | 4.79 |
| Eastwoodhill Aboretum | 4.33 |
| Leading Gisborne Wineries | 4.25 |
| Gisborne Town & Coastal Drive | 3.00 |
| Total | 4.45 |

Shore excursion ratings from Holland America Line (note: Gisborne Town and Coastal Drive was impacted by a timing issue)

The importance of Māori culture

ITO's and cruise lines are seeking Māori cultural experiences and are open to explore how local stories can be infused into the passenger experience, particularly as part of a welcome experience (including on board ships although this is more easily achieved in port than at anchor). Leveraging the region's uniqueness in this way could be important to its future appeal and uniqueness for cruise (see Appendix 3). It also provides an opportunity for the right stories to be shared in the right way - and there are multiple ways for that storytelling to manifest. While iwi and hapū have cruise and tourism generally lower in their overall priorities, they are essential stakeholders to the delivery of the region's rich cultural storytelling. Identifying opportunities to do so for cruise in ways that build mana is important and could enable mutual, reciprocating benefits - positive for visitors, Māori and the region as a whole.

A welcoming, authentic support for considered growth

Growing cruise in the region is generally supported across a broad cross-section of stakeholders - within limits. Some stakeholders consider 40 to 60 vessels per year may be possible; others indicate one to two vessels per week through the cruise season would be an achievable rhythm. Importantly, there is a common desire to not disrupt the unique way of life and community well-being enjoyed by residents. There is also an appreciation that cruise visitors will boost tourism and contribute spend to the economy in multiple ways including shore experiences, food and beverage, local business, port fees and beyond.

²⁴ Source: Carnival Cruise Corporation

Building momentum

After a lull in activity following the cyclone in 2023 the momentum for cruise visitation has new impetus driven by Trust Tairāwhiti with strong commitment and resource from Eastland Port and support from Gisborne District Council and others. The energy and spectacle of a cruise ship visit can demonstrate to the community that the region is worth visiting by people from all over the world creating pride of place and providing an international connection that can have multiple benefits. The potential for economic and community growth, new tourism product development, building the region's reputation and appeal (getting it on the map), increasing repeat visitation, diversifying port revenues, and elevating collaboration amongst key stakeholders are all reasons why cruise is desirable for Tairāwhiti Gisborne.



2.2 SWOT Analysis

Objective:

Assess Tairāwhiti Gisborne potential as a cruise destination in the context of the New Zealand market and identify key issues that come from the assessment.

Strengths

- Enthusiasm for cruise across stakeholders - including social licence.
- Increasingly strong collaboration between key stakeholders (Trust Tairāwhiti, Eastland Port, Gisborne District Council, ITO's)
- Strong community focus of stakeholders.
- Especially welcoming and friendly community who have a strong sense of place.
- Diverse product including good core experiences for cruise visitors that rate well with visitors.
- Depth of Māori culture & heritage and interest in development of new cultural experiences.
- Meeting of two cultures: Māori heritage (arrival of Kiwa) and European history (Cook first landing)
- First city to see the sun (world), first place (NZ).
- Existing infrastructure close to port including Tupapa walkway, Titirangi/ Kaiti Hill, Puhī Kai Iti/ Cook Landing, beach/ coast, gardens, museum.
- Port berth facilities (ships <180m & 200m in future).
- Port tender arrival berth, gangway & alighting area.
- City, coast, river, gardens and cultural features within easy, walkable and primarily flat access from port*.
- Logical place to stop on the main cruise route 70% of the way between Tauranga and Napier - especially for slower ships (expedition, luxury).

Weaknesses

- Weather and logging ship movements can affect tendering and cause cancellations or delays, creating uncertainty for cruise lines, businesses and operators.
- Gisborne town centre needs improvements and revitalisation to make it attractive to visitors.
- Tourism product capacity limitations - 600 to 700 people - and lack of commissionable 'cruise ready' product available.
- Tourism ecosystem is light compared to others e.g., Bay of Islands.
- Lack of Māori cultural product, experiences, and storytelling for cruise passengers.
- Bus transport capacity limitations.
- Logistics of people movement - ensuring seamless, clearly marked, safe passage to key information, attractions, and facilities for visitors (including mobility and accessibility).
- Reliance on older volunteers for ambassadors and train operation - resource continuity.
- Awareness and understanding of cruise and related roles and responsibilities.
- Collaboration, planning, coordination, and communication around cruise historically lacking.
- Limited marketing and promotional budget to attract new cruise lines.

2.1 SWOT Analysis Cont.

Opportunities

- More ships seeking additional place to stop to avoid long sail from Tauranga to Napier.
- Repeat visits - ships and passengers returning.
- ITO's - passionate advocates for the region.
- Access by sea an easy way to come to an otherwise remote region.
- Ships with <1000 pax comprise 50%+ of NZ port calls in 24/25; 87% of port calls scheduled for 24/25 in Gisborne are <1000 pax.
- Visitors who have operator led experiences rate the region higher than those who are unguided.
- A balance of new and repeat visits scheduled for 2024/25.
- Future development projects with tourism opportunity - Food Bowl, Matai Campus, Aerospace, Rocket Lab at Mahia, CBD revitalisation.
- Port twin berth project completion (potential for 2 ships berthing <180m and up to 200m).
- More ships per season, 30 - 50 ships would be easier to manage enabling more tour operators, more transport, more consistency.
- Government grants and funding opportunities to support cruise industry development.

Threats

- New Zealand is an expensive place to cruise to; costs & barriers are increasing - next 2 to 3 years at least will see headwinds for cruise nationally.
- Europe actively trying to grow shoulder and winter cruising - direct competition to Oceania summer/ shoulders.
- Asia market is fully open and booming creating a deployment alternative and competition to New Zealand.
- Dominance of one cruise line in Gisborne schedule for 2025/26 season.
- Itinerary planners from cruise lines exclude Gisborne.
- Cruise has a long lead time - for new product and scheduling.
- Compliance requirements for new tourism product.
- Not enough ships coming into region for consistency and momentum to build.
- Scheduling conflicts e.g., Ships scheduled for same days as R and V, Fishing Bay Bonanza.



*Walkable Zones from Port

Coast and Heritage

Inner Harbour

River and Gardens

Central City

Having much to access within easy, flat walking distance of the port is a significant and substantial strength. There are several zones that can be leveraged for self-guided activity, food and beverage, or new product developments including:

- **Inner harbour:** The inner harbour is an attractive area including several food and beverage options for visitors that offer dining, drinks and coffee - before, in between or after tourism experiences.
- **Coast and heritage:** With Tupapa Walkway, Kaiti Hill, Puhi Kai Iti and the future development of the Waka Bridge there are opportunities to create self-guided or guided walking (or alternative transport for those less mobile e.g., golf carts) cultural/ storytelling tours on the doorstep of the port.
- **River and gardens:** Offer an attractive place for self-guided walking, picnics or a guided walk to the Tairāwhiti Museum.
- **Central city:** Lined with palm trees, interesting architecture, but also empty and derelict buildings, homelessness; provides easily accessible shopping for crew, with future enhancements required to make for an appealing visitor experience.

2.3 Key Issues

A Gisborne port is well set up and ideally located to become a key part of the New Zealand cruise route, especially for smaller ships

- It's a logical stopping port for higher density itineraries, or to add variety, with good berthing facilities for ships under 180m (and in future 200m), making for easy to manage, low impact port calls
- There are fewer ships in this smaller category, and they are less beneficial to the community
- Gisborne offers an alternative, or additional, stop between Tauranga and Napier
- There is much potential within walking proximity to the port, but bus transport is limited.

B For medium-size ships, Gisborne represents a potentially viable addition to an itinerary

- There are several ships and cruise lines that fit these criteria (180m plus and up to 2000 passengers) that could offer more value to the community
- There is an excellent tender facility once in the inner harbour
- The immediate marine environment surrounding the port creates uncertainty for tendering; there will always be a risk of poor weather conditions or significant swell from the south (which Tūranganui-a-Kiwa/ Poverty Bay is exposed to)
- This uncertainty can negatively affect cruise line ratings of the port through uncertainty; it is also outside of the control of port operations.

C Passengers on small and medium size ships are typically interested in unique places and different experiences

- They want to immerse themselves in the essence of people and place, a match for Gisborne
- They want to know what is different and special and share the stories when they return home
- High visitor ratings for ports and experiences increase likelihood of repeat visitation.

D Tairāwhiti Gisborne is a charming, welcoming and unique community with easy walking access and some good shore excursions; but it lacks differentiation and awareness

- There is a unique, genuine character to the region, with welcoming people
- A core set of experience offerings rate well with passengers, but overall there is not much bookable product beyond that set
- Unique heritage, culture and stories, including first place to see the sun, offer opportunity
- However, it's currently not well-known as a port and destination and has a significantly lower profile than neighbouring ports Tauranga and Napier.

E There is strong potential in history, heritage and Māori culture of the region

- A depth of heritage, history and stories that are unique to the region, including first place to see the sun and the meeting of two cultures, offer opportunity
- There is a consistent demand across the board for Māori cultural experiences and storytelling
- These stories need to be told by mana whenua to ensure accuracy, authenticity and mana
- Iwi and hapu to date haven't yet prioritised tourism, including cruise tourism.

F The short term will see a challenging environment for cruise in New Zealand and a recovery is expected to happen, but timing for that recovery is unclear

- Tairāwhiti Gisborne at best can only ever capture a proportion of the ships coming to New Zealand
- There is a near term risk for cruise investment
- Luxury and expedition ships (the largest growth segment globally and largest New Zealand segment) may be less impacted but this is unconfirmed.

2.4 The Problem to Solve



The key problem to solve for this strategy is how might the region meaningfully grow cruise in a way that is positive for the long-term benefit of the whole community when there are natural geographical, capacity and offering constraints and a declining national cruise market?



3

Direction

3.1 Vision for 2034 → shaping our aspiration

This vision, shaped by input from stakeholder engagement, aims to provide a clear, unified and aspirational basis for the direction of Tairāwhiti Gisborne’s cruise pathway, engaging a collaborative approach, inspiring progressive and proactive actions, and achieving desired outcomes.

Tairāwhiti Gisborne is firmly established on the map as an attractive port and destination, attracting top-tier cruise lines, engaging shipping agents and ITO’s, and stimulating the curiosity of passengers with its unique offerings. Cruise ships make an average of two visits per week, bringing around 20,000 visitors throughout the cruise season through 40 to 50 port calls, primarily from smaller vessels, with some mid-size vessels. This steady flow of visitors has driven the goal of \$12 million in total economic value annually, supporting long-term prosperity for the region.

Reputation and loyalty have grown as both cruise lines and passengers return, captivated by Tairāwhiti Gisborne’s distinct charm. The community embraces its identity, welcoming cruise visitors with warmth and enthusiasm, and benefiting in a variety of ways from each visit. Informed and engaged, locals enjoy the vibrant atmosphere that fills the town whenever a ship is in port.

Operations run smoothly, with well-coordinated efforts that feel effortless. While perfection isn’t expected, there is a reassuring sense of balance, consistency, and reliability that benefits both the cruise industry and the community.

Core operators have expanded their offerings, blending food, beverage, and elements of cultural immersion into every visit. The result is greater capacity, deeper engagement, and more meaningful benefits for all.

New experiences have flourished near the port, particularly around Titirangi/ Kaiti Hill, Tupapa walkaway and Puhi Kai Iti/ Cook Landing, and these are connected to the ‘first to see the sun’ proposition and local Māori culture. There is an authentic celebration of Māori culture and storytelling, expressed in multiple ways, adding to the region’s appeal for cruise visitors but also a source of pride and mana for the community.

Every visitor is embraced through a spirit of manaakitanga while being treated to a remarkable, high-quality experience that showcases the region’s unique character and reinforces its reputation as one of the most welcoming and interesting places to visit in the country.



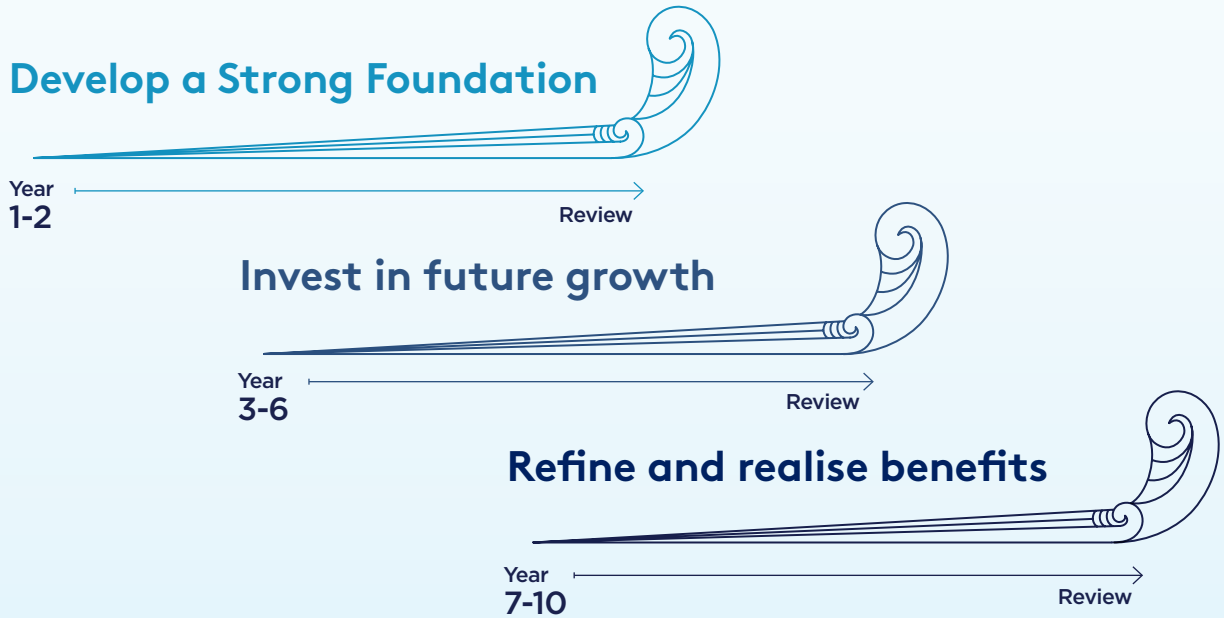
Vision summary

An attractive cruise destination, known for its unique offerings, seamless operations, and welcoming spirit, where visitors experience genuine regional culture while the region enjoys sustained economic and community benefits.

3.2 Vision Pathway → journey to our aspiration

Significant investment in the short term is unlikely to see an equally significant short to medium term return. However, to capitalise on a relatively strong 2024/25 season, to establish the awareness and differentiation of the region, to increase its capability to drive attraction, and to be prepared for a future uplift in visitation, action does need to begin now.

Cruise will be dynamic over coming years, and the incremental changes required in Tairāwhiti Gisborne support adopting a phased approach to implementation. This phased approach adds definition to the pathway and provides for significant scheduled reviews in between each phase to enable adaptation to changing circumstances.



In **phase one** we will focus on collaboration of effort, improving our processes, building industry relationships, testing new products and experiences, and gaining learnings. The intention is to elevate our operations to an excellent level, establish our positioning, presence and direction with key cruise stakeholders, and enhance our future capabilities.

In **phase two** we will aim to leverage and improve our facilities, introduce more new products and experiences, and achieve milestones to enable longer term benefits. The intention is to ensure we are prepared to benefit from an anticipated future uplift in cruise visitation, including enhanced capacity.

In **phase three** as we realise the benefits of our efforts, we will also make refinements to our approach capitalising on the focus, investment, experience, and learnings of the previous six years. The intention is to continue to improve over the course of time, while we also realise the rewards.

A full review of the strategy will take place at the end of each phase, in addition to annual evaluations. This will allow for adaptation to changing circumstances or new information in what is a dynamic market. Reviews are also the time to review performance and adjust goals and actions as and if required.





3.3 Target Audience → who we want to attract

Much of the decision power in determining which ships go where (also determining which passengers visit what destination) rests with the cruise lines. However, aligning on what value Tairāwhiti Gisborne can deliver to cruise, to who that value is delivered, and why, will provide focus and priority for cruise attraction efforts and activities performed to deliver that value.

Curious cruise visitors coming to New Zealand who are more likely to participate in onshore experiences and spend money in regions are seeking high quality, unique and immersive experiences where they can learn about and engage with the place and its people.

Cruise lines currently view New Zealand as attractive, driven by passenger demand, but overall expensive and difficult which is a barrier. They are therefore potentially price sensitive with a drive to avoid uncertainty and its associated costs.

To grow value for itself and be more attractive the region needs to give value or create value that is meaningful and relevant for both the right type of visitors and the right type of cruise lines.

Community benefit from cruise visitation is the key strategic priority for Tairāwhiti Gisborne stakeholders. Therefore, identification of target cruise lines (and ships) is shaped by the parameters community value and effort and defined by passenger numbers and length combined. These parameters are all fundamental to the impact of cruise in the region. Community value includes breadth of economic contribution, vibrancy, and growth stimulation. Effort includes uncertainty, logistics (tender and berth), and potential negative community impact. Parameters are optimal when vessels are berthed (currently 180m or less) and the community receives higher benefits (circa 500+ passengers).

Luxury and expedition ships and mid-sized premium ships are more likely to attract passengers who are looking for unique experiences and are willing to immerse themselves in understanding a destination more deeply representing a better fit for a smaller, unique region like Tairāwhiti Gisborne.

Identifying cruise lines with best fit for Tairāwhiti Gisborne



The categories identified in this 2 x 2 chart have certain characteristics that inform the approach and associated challenge for each:

| CATEGORY | CHARACTERISTICS | APPROACH | CHALLENGE |
|---|--|--|--|
| <p>①</p> <p>Ships 160m to 180m, 500+ passengers (the sweet spot)</p> | <ul style="list-style-type: none"> • Can berth (up to two at a time from 2025/26) • Curious passengers looking for unique experiences a good fit for region • Sufficient passengers to contribute broad value, limited ships/lines fit criteria. | <p>→ Attract and retain, while aiming to grow frequency</p> | <ul style="list-style-type: none"> ⓘ Grow frequency of calls from those ships visiting NZ that are a fit ⓘ Requires remarkable visitor experience + attractiveness for cruise lines. |
| <p>②</p> <p>Ships under 180m, less than 500 passengers</p> | <ul style="list-style-type: none"> • Can berth (up to two at a time from 2025/26), with low effort • Curious passengers looking for unique experiences a good fit for region • More lines and ships match criteria, value to community limited due to fewer passengers. | <p>→ Attract /retain, aim to grow value and frequency</p> | <ul style="list-style-type: none"> ⓘ Increase value to community (e.g., berth two at once) and increase frequency of calls ⓘ Requires unique, remarkable, high-quality visitor experience + tailored product + attractiveness for cruise lines. |
| <p>③</p> <p>Ships over 180m, less than 2000 passengers</p> | <ul style="list-style-type: none"> • Primarily tender and higher effort, uncertainty and risk for both sides • Substantial passenger numbers, appreciate special places, can contribute broader value • Many lines and ships fit these criteria, represent significant value. | <p>→ Attract /retain and manage effort</p> | <ul style="list-style-type: none"> ⓘ Reducing effort for community and cruise lines to minimise uncertainty ⓘ Requires planning, process and streamlined effort to enhance tendering + attractiveness for cruise lines + uniqueness of place, people, product + high quality visitor experience. |
| <p>④</p> <p>Ships over 250m, over 2000 passengers</p> | <ul style="list-style-type: none"> • Large ships with many passengers, require tendering • Logistics and impact on community high • Passengers less likely to be a fit for the region. | <p>→ Assess and manage by exception</p> | <ul style="list-style-type: none"> ⓘ Support where necessary/ advantageous to region; manage impact ⓘ Develop specific criteria for large ship visits (e.g., emergency stops, port availability, cruise line strategic relationship) ⓘ Include a comprehensive impact assessment to avoid community risk and stress of logistics. |

Target audience priorities

Based on the assessment outlined above the target audience focus is as follows:

Priority ①

- Leverage geographical location and berthing capability to attract ships for multiple visits under 180m (and in future under 200m) in categories 1 and 2.
- Include dual berthing wherever possible to boost passenger volume and community benefit.
- The foundation target audience and the likely niche for the region.
- Approximately 60 to 70% of effort.

Priority ②

- Proactively attract category 3 cruise lines with ships less than 2000 pax to increase community contribution.
- Manage effectively to decrease likelihood of tendering issues while recognising some cancellations are inevitable; work collaboratively with cruise lines, ITO's and port agents to improve systems and increase attractiveness.
- Secondary but worthwhile and potentially valuable audience for the region.
- Approximately 30 to 40% of effort.

While category 4 ships are not a priority for the region there are times when it may be necessary to accommodate them. To ensure the region is prepared and associated risks are managed appropriately a criteria and impact assessment will be developed for these circumstances.



3.4 Value Proposition → how we add value

The value proposition is the cornerstone of the pathway forward, defining our destination uniqueness while delivering relevant value to our target audiences. It encapsulates what makes Tairāwhiti Gisborne a compelling choice for both cruise visitors and cruise lines.

→ Value Proposition



Visitors

A welcoming, authentic, and distinctive regional New Zealand experience for those who seek something real, yet beyond ordinary.

Delivered through:

- Welcoming community
- Unique products
- Distinctive culture and positioning

Cruise Lines

A viable, value-driven and welcoming port call for North Island and New Zealand itineraries that will exceed passenger expectations.

Delivered through:

- Attractive port pricing
- Seamless berthing and tendering
- High visitor rates



▶ The value proposition will be measured through:

- ✓ Visitor satisfaction improvement (Cruise line visitor ratings)
- ✓ Tairāwhiti Gisborne brand awareness (Metric tbc)
- ✓ Increased port calls (Season port calls per annum)
- ✓ Economic benefit growth (Direct economic benefit from cruise).

3.5 Outcomes → what we aim to achieve

Implementation of this strategy is an opportunity to drive long term benefits for the region, specifically we will seek to achieve the following outcomes, each of which is measured by a set of representative goals making the outcomes more tangible:



Community

Social and economic benefits for the community including increasing financial contribution from cruise through multiple channels (Port, operators, local businesses), increased vibrancy and pride of place, increase in activation of infrastructure enhancing not detracting from the local way of life.

Measured by:

| | | |
|---------------|------------------------------------|-------------------------|
| Goal ① | Total economic benefit from Cruise | \$12 m per annum |
| Goal ② | New cruise tourism product | 4 new products |
| Goal ③ | Community well-being | Survey or other measure |



Continuity

An increase in frequency of cruise ships that enables more continuity in planning, resourcing and increased opportunity and benefits for more of the community.

Measured by:

| | | |
|---------------|-----------------------------------|-----------------------|
| Goal ④ | Season port calls by 2034 | 50 |
| Goal ⑤ | Frequency (average across season) | 2 port calls per week |



Unity

Elevation in Māori engagement for reciprocal benefit, plus increased collaboration to enable better delivery for cruise passengers, increased stakeholder engagement and communication, and stronger social licence for cruise.

Measured by:

| | | |
|---------------|--------------------------------------|----------------|
| Goal ⑥ | New Māori cruise tourism product | 2 new products |
| Goal ⑦ | Cruise line visitor ratings for port | 90% |
| Goal ⑧ | Social licence for cruise | 90% |

3.6 Principles → how we achieve

As we work to achieve our strategic outcomes the nature of our actions is shaped by key principles. Adhering to these principles is about how we achieve, which is equally important to what we achieve.



Working together

Regional stakeholders will collaborate, combining their strengths and resources to align efforts and achieve shared goals for the community and economy while partnering externally for impact when needed.

- Through collaboration we combine our resources and talents to achieve more
- The spirit of manaakitanga is evident in all our relationships – internally and externally
- We partner with, or draw on the expertise of, industry experts to accelerate our efforts
- We recognise everyone in our community can have a role to play and benefit from cruise.



Improving over time

Progress will take time, and while we can't do everything at once, it's crucial to act now and iterate as we go to set the foundation for future improvements and long-term benefits.

- We take the opportunity to learn from every ship visit and every season, improving as we go
- We embrace the long lead times of cruise and shape our efforts to achieve our outcomes
- We set both long and short-term goals, regularly reviewing our performance
- We act now, knowing the benefits will come in future.



Protecting our character

It's essential to preserve the region's unique character, ensuring that growth and development honour its distinct culture, environment, and community identity while we work to enhance its appeal to visitors.

- While we strive for growth, we prioritise our people, place and way of life
- We focus on attracting and serving ships and visitors that are a match for our region
- We leverage our uniqueness for reciprocal benefits
- We know that protecting our character will build our reputation for the long term.

4

Action

4.1 Strategic Priorities with Actions

The strategic priorities, delivered through key actions, are designed to create the alignment and momentum needed to propel Tairāwhiti forward on this Cruise Development Pathway. At the end of each phase during the ten-year pathway, these priorities will be reviewed for ongoing validity.

The objectives and key actions associated with each priority, specifying the primary stakeholder designated as lead for each specific supporting action. Ultimately, the Cruise Steering Group holds overall responsibility for implementing these key actions. The Cruise Steering Group is composed of representatives from key stakeholders: Trust Tairāwhiti, Eastland Port, Gisborne District Council. The cruise operations group is responsible for the day to day operations of each port call.



4.2 Key Actions

Priority 1

Cruise Line Attraction

Objective: Build and strengthen relationships with cruise lines and other influencers to build awareness and establish Tairāwhiti Gisborne as an attractive destination, actively driving cruise line visits.

Summary: Tairāwhiti Gisborne will proactively engage key influencing stakeholders, including NZCA, cruise lines, ITOs and port agents, and provide compelling reasons for ships to visit and return.

Key Actions:

① Proactively engage target cruise lines and influencing channels

Ⓐ Leverage relationships and channels to enhance region presence

→ Lead: Trust Tairāwhiti

- Proactively build relationships with key influencing stakeholders, share plans, and seek advice. Include New Zealand Cruise Association (NZCA), ITO's, priority 1 and priority 2 target cruise lines, and, where possible, other regions willing to knowledge share.
- Encourage NZCA to embrace Tairāwhiti Gisborne's 'unique and distinctive offering' narrative once defined, ensuring narrative presence and consistency in offshore sales calls.
- Engage cruise lines with the region's narrative including provision of information for passengers on board prior to ships arriving in region.

Ⓑ Targeted cruise line executive famils

→ Lead: Trust Tairāwhiti

- Organize familiarisation trips for key executives, especially those responsible for itinerary planning, but also including senior decision makers to build awareness and regional connection.
- Encourage feedback about improvements in operations and product development and use this input to refine offerings.
- Collaborate with NZCA to identify and secure the right participants for these famils.

Ⓒ Targeted ITO famils

→ Lead: Trust Tairāwhiti

- Invite senior ITO representatives especially from Akorn, IDNZ and PPG to visit the region and refamiliarise them with its natural features, infrastructure, people, and product.
- Use the opportunity to gain insights and input into operations improvement and product development.

D Position Gisborne as an itinerary solution→ *Lead: Eastland Port*

- Proactively promote Tairāwhiti Gisborne as a key route management destination on New Zealand's East Coast by highlighting its strategic position, port features, and walkable areas, engaging cruise line planners and port agents.
- Target cruise lines that fall within the first and second priority groups, ensuring pitches are tailored to address their specific needs and opportunities for long-term collaboration.
- Highlight the ability to berth two ships under 180 meters at once and emphasize proximity to crew amenities and attractions.

E Develop criteria for large ship visits→ *Lead: Eastland Port*

- Establish guidelines to manage large ship visits effectively when situations arise where they may occur (e.g., emergency stops, cruise line strategic relationship protection).
- Consider the importance of strategic relationships with cruise lines that operate ships both inside and outside the two priority target audience groups.
- Conduct impact assessments to mitigate risks to the community, manage logistics to minimise negative impacts, and optimise positive economic value.

2 Implement attractive pricing and incentives**A Set aggressive, penetration pricing for target cruise lines**→ *Lead: Eastland Port*

- Offer competitive, incentive-based pricing to target cruise lines in the first and second priority audience to stimulate new visitation and build relationships with cruise lines.
- Leverage pricing to build momentum and strengthen relationships over the next 3 to 6 years working in collaboration with port agents for advice.

B Review and refine pricing over time→ *Lead: Eastland Port*

- Review and refine pricing in line with reviews of this strategy to enable a balance between regional attractiveness to cruise lines and long-term revenue management.
- Consider differential pricing that applies higher pricing for non-target large ship visits, in addition to beneficial pricing for first-time visits.

► Success Indicators

- ✓ Increase in engagement with key cruise ecosystem stakeholders
- ✓ Increase in awareness and understanding of the region
- ✓ Increase in cruise line visitation – new and repeat

Priority 2

Unique & Distinctive Offering

Objective: Create a unique, differentiating positioning, supported by distinctive tourism offerings with, a focus on cultural and product development to increase appeal, experience quality and connection.

Summary: Tairāwhiti Gisborne will offer a distinctive proposition compared with the rest of New Zealand, particularly its neighbouring ports, including cultural and product offerings that reflect its unique heritage.

① Establish a distinctive positioning

→ Lead: *Trust Tairāwhiti*

A. Agree and leverage a position beneficial to cruise that considers first city to see the sun, combined with authentic Māori heritage, unique first encounters history, and welcoming, genuine community to build a narrative that resonates with both cruise passengers and itinerary planners.

B. Consistently communicate and reinforce this position through all cruise tourism touchpoints to build narrative alignment and impact.

C. Engage a wide breadth of stakeholder audiences including cruise line executives, NZCA, ITO's, port agents, visitors, and community, recognising the power of these voices as advocates.

② Stimulate Māori engagement and product development

→ Lead: *Trust Tairāwhiti*

A. Engage iwi and hapū and co-create approaches to leveraging the cruise opportunity that carry reciprocal benefits and responsibilities.

B. Establish a Māori product development incentive programme.

C. Explore specific opportunities to include Māori cultural elements in the visitor journey, including cruise ship visitor welcome (on board or on shore), cruise ship departure, experience integration (with existing operators) and storytelling.

D. Develop cultural competency training for all cruise tourism operators.



③ Enhance and expand products and experiences

→ Lead: Trust Tairāwhiti

A. Develop walkable zone experiences

- Explore development of experiences in walkable zones around the port, especially for mid-size cruise ship visitors where there is likely to be more demand.
- Enable visitors to independently explore and engage with the local culture, access operators spontaneously on shore, or purchase as shore experiences in advance on board.
- Prioritise central city enhancements to increase appeal of this zone and enable benefit for business owners.

B. Initiate product development and expansion workshops

- Host workshops with local operators to help them enhance and diversify their offerings, including capacity building, product variations, and integration of cultural elements such as storytelling.
- Collaborate with Inbound Tour Operators (ITOs), NZCA and cruise lines, to bring fresh perspectives and ideas for product development and include case studies and subject matter experts e.g., operators from other regions (non-competing but relevant).
- Establish a new product development/product expansion incentive programme.

C. Consider future-product development workshops

- Collaborate with forward-thinking local stakeholders, including the Food Bowl, Matai Campus, Aerospace and Rocket Lab, to explore future-focused tourism products when the timing is right.

D. Increase products for smaller ships to stimulate value growth

- Collaborate with ITO's and directly with relevant cruise lines to identify how to provide additional value for luxury and expedition ship passengers through niche or bespoke product with a focus on securing longer term commitment, financial stability and increased capacity.
- Encourage ancillary experiences and purchases to match this audience; for example, wine centre opening, tastings and purchases, including offering to send cases of wine to overseas addresses.

▶ Success Indicators

- ✓ Increased pride and confidence in the region
- ✓ Growth in awareness and reputation
- ✓ A diversified and regionally representative product set
- ✓ Increased onshore spend and repeat visitation
- ✓ Authentic Māori storytelling that enhances mana.

Priority 3

Optimising for Visitor Experience

Objective: Continuously improve operational efficiency and the quality of the visitor experience to increase visitor satisfaction, long-term demand and repeat visitation.

Summary: Tairāwhiti Gisborne will further enhance its welcoming reputation with an ongoing focus on operational improvement, seamless flow and visitor experience optimisation.

Key Actions:

① Deliver continuous operational enhancement

Ⓐ Build on planning and coordination momentum

→ *Lead: Operations Group*

- Continue to develop the impact and focus of the Operations team to be the catalyst for action with a continuous improvement mindset, especially for systems and processes.
- Prioritise cruise on the standing agenda of the TDAG to ensure alignment is achieved and there are mechanisms in place for overcoming roadblocks to enable action.

Ⓑ Align the regional events calendar with cruise ship schedules

→ *Lead: Operations Group*

- Develop a regional events calendar that is planned at least two years in advance and integrates cruise ship visits as 'events', especially for 500 passengers and above.
- Collaborate with event managers and port agents to minimise conflicts between cruise arrivals and local events.
- Explore mitigations e.g., communicate with port agents early for alternative scheduling dates, explore alternative event dates with event managers, early communication with the community to ensure smooth planning and preparation for any overlaps.

Ⓒ Implement a measurement framework and benchmarking

→ *Lead: Trust Tairāwhiti*

- Implement measures over ten years as the measurement tools become available and to match the phased implementation of the strategy.
- Benchmark specific metrics against other regions with similar location, value proposition, size and/or challenges. (e.g., Timaru, Bay of Islands, Taranaki, Nelson, Napier, Tauranga).

Ⓓ Reestablish the ambassador programme

→ *Lead: Trust Tairāwhiti*

- Engage volunteer ambassadors as hosts, information providers and guides for cruise visitors.
- Encourage all the community to engage with cruise visitors and be unofficial ambassadors for the region when cruise ships are in town.
- Encourage business owners to put up window signage and provide a special welcome or offers when relatively bigger ships are in port e.g., 500 to 1000 passengers plus. Test and learn which ships are most beneficial for business.

② Map and improve the visitor journey

Ⓐ Map the visitor journey

→ Lead: Trust Tairāwhiti

- Conduct a detailed map of the visitor journey for both berthing and tendering scenarios.
- Identify key moments of truth, pain points, and opportunities to enhance the experience, ensuring the region delivers its best at every touchpoint.

Ⓑ Create a distinctive Welcome and Farewell experience

→ Lead: Trust Tairāwhiti

- Consider engaging cruise lines in advance to grow anticipation for the region on board as the ship comes down the coast the day before (day before briefings are typical).
- Develop a distinctive Welcome activity that embodies the region's identity and spirit of manaakitanga. Consider cultural elements or onboard storytelling before disembarkation.
- Develop a memorable Farewell activity to leave a lasting impression on departing visitors.

Ⓒ Elevate the tendering experience

→ Lead: Eastland Port

- Ensure that the tendering process runs smoothly, without disruption to timing caused by other ships, ensuring a seamless transition into the tendering berth.
- Work in collaboration with port agents, cruise lines and ITO's to identify how it can be improved for all parties, consider how other regions, such as Bay of Islands, may be able to share learnings.
- Create an experience on the tender itself, potentially through storytelling or informational sessions about Tairāwhiti Gisborne, making the journey part of an overall positive experience.

Ⓓ Enhance signage and wayfinding

→ Lead: Eastland Port

- Establish clear, welcoming, distinctive signage as cruise visitors disembark.
- Include wayfinding and provision of information that easily guides them to key locations within walking distance of the port to enhance their experience.

Ⓔ Improve infrastructure

→ Lead: Gisborne District Council

- Use the visitor journey map to identify existing, underutilised infrastructure that can add value to the visitor experience e.g., Tupapa Walkway, Titirangi/Kaiti Hill, Puhi Kai Iti.
- Identify opportunities from the visitor journey map to guide future investment in facilities.

Ⓕ Establish a cruise education programme

→ Lead: Trust Tairāwhiti

- Expand knowledge about cruise tourism for operators and businesses by running regular education programmes to build insight, capability and help identify opportunities to be involved.

Ⓖ Explore Government and industry funding

→ Lead: Trust Tairāwhiti

- Explore government and industry funding opportunities for cruise tourism development in the region as they become available (working with NZCA where appropriate).
- Evaluate and apply for funding where criteria can be met.

③ Actively engage stakeholders and community

Ⓐ Create and implement a stakeholder engagement & communication plan

→ Lead: Trust Tairāwhiti

- Develop and implement a plan to inform and engage all relevant stakeholders before, during, and after each cruise season and prior to each cruise ship visit. Engage local media to support.
- Include timely updates on cruise schedules, visitor expectations, and any operational changes, fostering a sense of shared responsibility.
- Manage expectations of the community about different types of cruise ships visiting, from larger vessels to smaller luxury or expedition ships.

Ⓑ Develop a cruise playbook

→ Lead: Trust Tairāwhiti

- Create a cruise playbook that aligns all impacted stakeholders (port, RTO, councils, operators, retail businesses, transport, iSite, community) leveraging best practice from other regions.
- Include the why, what, when and how of cruise. Provide information on cruise tourism, cruise ships and schedule, product opportunities, understanding and engaging cruise passengers, and how the community can contribute to a positive visitor experience. Review and improve annually.

▶ Success Indicators

- ✓ Higher visitor ratings
- ✓ Increased repeat visits
- ✓ Broader community engagement and understanding
- ✓ Increased energy and vibrancy when a cruise ship visits




5

Evaluation

Ongoing measurement is essential to evaluation of impact while also enabling identification of areas where adjustment may be required. The three parts of our evaluation programme include primary measures, secondary measures, and benchmarking.

Primary measures

Our priority is to measure against the key goals for each of our intended outcomes. The following primary measures and targets will be monitored over the ten-year Cruise Development Pathway:

| OUTCOME | GOAL | MEASURE | 2034 TARGET | SOURCE |
|---|------|--|---|-----------------------------------|
|  Community | ① | Total economic benefit from cruise | \$12m p.a. (50 port calls x \$240k per ship) | NZCA/ CLIA annual report |
| | ② | Increase cruise tourism product | 4 new products | Trust Tairāwhiti |
| | ③ | Grow community well-being | - | Trust Tairāwhiti |
|  Continuity | ④ | Increase cruise season port calls | 50 | Eastland Port |
| | ⑤ | Achieve consistent port call frequency (average across season) | 2 port calls per week | Eastland Port |
|  Unity | ⑥ | Increase Māori cruise tourism product | 2 new products | Trust Tairāwhiti |
| | ⑦ | Elevate cruise line visitor ratings for port | 90% | NZCA/ Cruise lines |
| | ⑧ | Improve social licence for cruise | 90% | Trust Tairāwhiti |

Secondary measures

In addition to these primary measures the following secondary measures will be monitored and/or established once a data source becomes available:

| MEASURE | 2034 TARGET | SOURCE |
|---|---|----------------------------------|
| Grow total number of cruise visitors to region per annum | 20,000 visitors (50 port calls x 400 passengers) | Eastland Port |
| Increase average spend per passenger | \$150 | CLIA/NZCA annual report |
| Achieve target % of passengers who disembark (average) | 50% | Cruise lines |
| Increase brand awareness of region with cruise lines and passengers, or in key international markets | 40% | Eastland Port |
| Repeat visitation to the region, especially from Australian visitors | 60% | Eastland Port / Trust Tairāwhiti |

Benchmarking

A regional benchmarking programme will be established for a key set of our primary and secondary measures against regions with similar location, value proposition, size and/or challenges. This may include regions such as Timaru, Bay of Islands, Taranaki, Nelson, Napier, and Tauranga. A benchmarking programme can identify best practices, improve competitiveness, and guide decision-making.

Appendices

Appendix 1:

Risk Assessment

This risk assessment represents an informed estimate of risks based on the information currently available. Any number of possibilities may occur over the coming ten years which may create additional risk factors but based on this assessment, the Cruise Development Pathway with mitigations effectively implemented represents a low-medium risk profile.

| RISK | DESCRIPTION | IMPACT | LIKELIHOOD | MITIGATION | ESTIMATED RESIDUAL |
|---|--|--------|------------|---|--------------------|
| Cruise decline continues | The recent decline in cruise ships visiting to New Zealand extends longer and deeper than expected because of increasing costs and other micro or macro factors. | High | Medium | <ul style="list-style-type: none"> Strengthen regional value proposition Pricing and incentives to increase attraction Increase cruise line engagement Increase cruise industry stakeholder relationships | Medium |
| Community does not support cruise growth | Gisborne community becomes disenchanted with the impacts of cruise and disengages. | Medium | Low-Medium | <ul style="list-style-type: none"> Engage community early and often Highlight benefits of cruise Deliver community benefits as a priority | Low |
| Lack of regional coordination and alignment | Key stakeholders are not aligned, making it difficult to keep momentum and implement actions. | Medium | Low | <ul style="list-style-type: none"> Prioritise the Cruise Operations Group Prioritise cruise on TDAG agenda Unify on and implement a cruise strategy Role and responsibility clarity Agree on targets and measures and monitor | Low |
| Low Māori engagement and support | Iwi and hapū don't support or become involved with cruise tourism impacting the ability to deliver cultural elements, Māori product and storytelling. | Medium | Medium | <ul style="list-style-type: none"> Engage early to build partnerships approach Co-develop tourism products Māori led welcome and farewell activities with mana Cultural competency training for operators Ensure reciprocal benefits | Low-medium |
| Silversea cruise ships stop visiting region | Silversea ships represent 65% of 25/26 cruise ship bookings and have been a reliable visitor. If they were to stop visiting it, would have significant impact. | High | Medium | <ul style="list-style-type: none"> Prioritise engagement with Silversea cruise line and ITO (PPG) Consider loyalty incentive | Medium |
| Cruise lines preferences | Cruise lines take business to competing regions not seeing the benefits of Tairāwhiti Gisborne | High | Medium | <ul style="list-style-type: none"> Strengthen destination appeal Offer incentives Increase engagement with cruise lines Enhance operational excellence Monitor competing regions | Medium |

| RISK | DESCRIPTION | IMPACT | LIKELIHOOD | MITIGATION | ESTIMATED RESIDUAL |
|--|---|--------|------------|--|--------------------|
| No investment in new product | Existing operators are hesitant to invest in new product for cruise because of concerns about ROI. | Medium | Medium | <ul style="list-style-type: none"> • Product development capability building and co-creation • Product development incentives • Encourage development of niche products for luxury or expedition ships • Work with ITO's on long-term contracts for products with cruise lines and operators | Low-medium |
| Unfortunate weather circumstances increase cancellations | Ships reliant on tendering decide to reroute because of poor weather impacting actual port calls in any given season. | Medium | Medium | <ul style="list-style-type: none"> • Enhance tendering experience • Work with cruise lines on onboard engagement options • Increase early communication with cruise lines to align on weather & positive passenger communications | Medium |

Appendix 2:

Significance of first to see the sun

The significance of Gisborne being the "first to see the sun" for Māori is deeply rooted in cultural, spiritual, and geographical aspects. Gisborne, known as Tūranganui-a-Kiwa in Māori, is the easternmost city in New Zealand and is one of the first places in the world to witness the sunrise each day.

Cultural and Spiritual Significance

Symbol of New Beginnings and Renewal:

For Māori, the sunrise represents new beginnings and the renewal of life. The first light of the day is a powerful symbol of hope, rejuvenation, and the cyclical nature of time. It aligns with the Māori worldview of connectedness with nature and the environment.

Connection to Ancestral Lands:

The land of Tūranganui-a-Kiwa is historically significant for many iwi in the region. Being the first to see the sun ties the people of Gisborne to a prominent role in the daily renewal of life and time, reflecting their strong spiritual and ancestral bonds with the land.

Te Ao Mārama (The World of Light):

The transition from darkness to light (te ao mārama) is a fundamental concept in Māori cosmology. The dawn signifies the movement from night (te pō) to day, symbolising enlightenment, knowledge, and clarity. Gisborne, as the first to greet the sun, is thus viewed as a place of enlightenment and spiritual awakening.

Geographical Significance

Easternmost Location:

Tairāwhiti Gisborne's geographical position makes it one of the first inhabited places to experience the new day. This unique position elevates its status in both national and international contexts, reinforcing its importance in daily and annual cycles.

Examples of Significance in Practice

Rongomaraeroa:

At the East Cape, near Gisborne, there is a significant marae which holds dawn ceremonies that are spiritually important for the local iwi. These ceremonies often involve karakia and waiata that honour the new day and seek blessings.

Appendix 3:

Tairāwhiti Gisborne historical and cultural significance

Tairāwhiti Gisborne, located on the eastern coast of New Zealand's North Island, holds significant spiritual and cultural importance, particularly for Māori.

First Landing Site of Māori Ancestors:

The first Māori landing in Gisborne, traditionally known as Tūranganui-a-Kiwa, is a significant event in New Zealand's history. According to oral traditions, the Polynesian navigator and explorer, Kiwa, was among the first to land in the area. His name is reflected in the full name of the region, Tūranganui-a-Kiwa, meaning "the great standing place of Kiwa."

Arrival of Captain James Cook:

In 1769, Gisborne was the first place where the British explorer Captain James Cook made landfall in New Zealand. This event is a pivotal moment in New Zealand's history, symbolising the beginning of European exploration and subsequent colonisation. The site is commemorated with various monuments and museums that reflect on the interactions between Europeans and the Māori people at the time.

Māori Cultural Significance:

The region is home to several important iwi, including Ngāti Porou, Ngāi Tāmanuhiri, Rongowhakaata, and Te Aitanga-a-Māhaki. They have rich histories and traditions deeply connected to the land. Sites of spiritual importance include marae, sacred mountains, rivers, and other natural features that play a central role in Māori culture and spirituality.

Te Kurī a Pāoa (Young Nick's Head):

This prominent headland at the entrance to Poverty Bay is named after Pāoa, an ancestor of the Ngāti Porou tribe, and holds considerable spiritual significance. It was the first sighting point of New Zealand by Cook's crew, marked by "Young Nick" who was the first to spot the land.

Rongopai Marae:

Rongopai Marae is known for its unique painted meeting house, which is an important cultural and spiritual site for the local iwi. The artwork and carvings within the marae encapsulate stories and genealogies that are vital to the identity and heritage of the people.

Spiritual Festivals and Gatherings:

Gisborne hosts various cultural festivals and gatherings that celebrate Māori traditions and spirituality. Events such as the Te Tairāwhiti Arts Festival highlight the rich cultural tapestry of the region, bringing people together to celebrate and rejuvenate their cultural practices.

Supported by the
Tairāwhiti Cruise Steering Group

