

Cruise Dunedin

Action Plan - 2015-2018

February 2015

Contents:

Page		
2	2015 Actions	
3	Introduction	
5	Vision	
6	SWOT	
7	Actions	1. Develop a collective approach to the cruise industry
8		2. Develop and co-ordinate transportation and infrastructure
9		3. Be passenger and crew focused
10		4. Provide a memorable quality experience
10		5. Optimise passenger and crew expenditure
11		6. Information provision and promotion
12		7. Research and advocacy for future needs
12		8. Public Health and Safety notification
12	Measurements	
13	Areas of Responsibility	
14	References	

dunedin



Cruise Dunedin – Action Plan 2015-2018¹

2015 Actions/Projects	Agency/Person responsible	Timeline	Budget
Improve welcomes and farewells for ship visits. Explore funding to enable a 'welcome project'	CAG, DCC- ED VIA DCC Events, Port Otago	2015 welcome project	\$15k
Investigate training mechanism and encourage provision of commentary and information during transportation to & around the city to encourage increase in participation & sales	CAG/ Dunedin Host	2015	
Develop a proposal for a programme of volunteers and roving ambassadors as visible hosts (as seen in Melbourne and Tauranga). Identify appropriate funding.	CAG DCC –ED- i- Site	2015	\$\$s
Missing persons/accident/ illness: Develop a communication system to ensure smooth management of any incidents.	CAG, DCC-ED VIA	2015	
Coordinate transport infrastructure plan for the transportation of passengers from the ship to the city, and around the city. This plan would: <ul style="list-style-type: none"> - Endeavour to get buses as close as possible to the gangway where appropriate - make provision for any displacement of existing public transport in the city 	CAG – DCC – ED VIA Port Otago	2015 review with ORC bus hub plan	Nil
Investigate welcome options in Octagon/Port Chalmers – seating & signage	DCC – ED VIA	2015 Octagon City review	
Ensure adequate provision of designated space for central bus/shuttle parking	DCC – ED VIA	2015 review	Nil
Develop central city sheltered arrival and departure points	DCC – VIA	Octagon Improvements 2015	Nil
Work with NZTA on a plan to manage any disruptions to SH88 and minimise any effect on cruise transportation interruptions	DCC – ED VIA	Final plan March 2015	
Improve Octagon "welcome" atmosphere and experience and monitor by working with stakeholders including Octagon Market.	DCC-ED – VIA. City Planning & Reserves	2015 DCC Octagon trial + improvements	
Provide signage around the city identifying where attractions/activities are located ('you are here' signs)	DCC – VIA	City signage review 2015	
Develop and promote key "flow routes" for walking visitors that link key tourist attractions and retail highlights.	DCC-ED - VIA, i- SITE, ODT Guide	Signage Review 2015	
Develop plan for when ships stay overnight. Work with local retail/food operators to assist them to tailor offerings	DCC – ED - VIA	2015 plan for o/night stay	Nil
Work with visitor and retail industry to encourage sales training 'Master of sales', to maximise sales opportunities	DCC- ED VIA/ OCCI	2015	
Build a research database to share with visitor industry and enable informed future decision making – should live online. Include – broad future trends for the world and NZ (available through Cruise NZ), Update industry through briefings.	DCC- ED	2015 website project	
Communicate transport costs/payment clearly to passengers/ Inbound tour operators before arrival (via websites)	Dunedin Marketing	2015 website review	Nil
Encourage visitors to come back to Dunedin – provide deals and ongoing communication. 25% come back to NZ	Dunedin Marketing	2015 plan	
Ensure Dunedin websites have Cruise Information pages that are comprehensive and consistent. Dunedinnz.com and DCC links	CAG. ED Dunedin Marketing	2015 Web project	Nil
Take advantage of free and independent travellers (FITS) – provide a booking system and services (either online or at the port) to arrange their own activities or visits to attractions.	ED i-SITE Dunedin Marketing	Annual review. 2015 web upgrade	Nil
Embed accessible information for disabled passengers into the visitor information and experience	DCC Enterprise Dunedin/ED VIA	2015 review incl website	
Visit cruise lines to maintain and encourage Dunedin/Port Chalmers Visits	Port Otago/ Dunedin Mkting	2015 plan	

ACTION PLAN INTRODUCTION

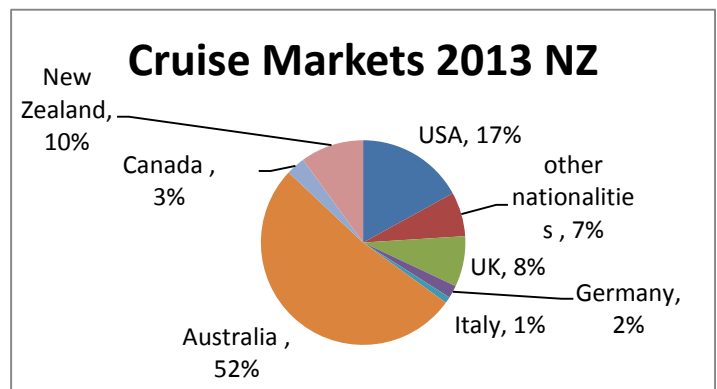
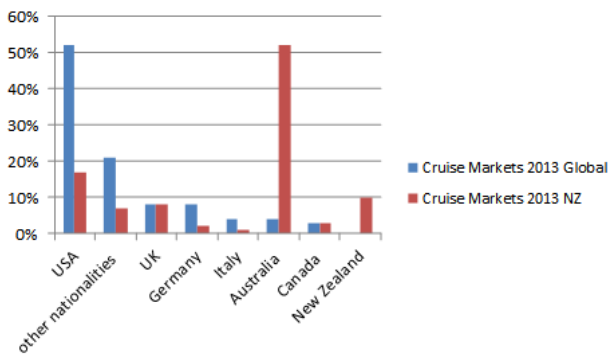
This document outlines a strategic action plan for the Dunedin Cruise industry leading towards 2018, beginning with an outline of the value and predicted growth of the industry in Dunedin. The document then moves to outlining a vision statement for the industry, a SWOT analysis of the current industry, guiding principles behind developing the industry, strategies and a tactical response, a proposed timeline, budget and measurable outcomes.

Background

The international cruise industry has experienced considerable growth since 1970.

Globally:

- Passenger numbers 2013 = 21.7 million. 1970 = 500,000
- Over a 9% compound annual growth rate since 1996.
- The majority of new ships entering the market cater for larger capacities, over 2500 passengers
- Global activity is concentrated in North America, with Florida and the Caribbean playing host to the majority of global activity and is dominated by passengers of American origin
- Australasia has been recognised as a growth market with exceptional growth reaching 20% in 2013/14



- Capacity is all important with considerable growth in the supply of new generation ships in the 2500 plus passenger category. This has generated an expansion in on-shore facilities to meet their needs.
- Newer markets are viewed as being more likely to expand rapidly if they are serviced by the newer ships. In a sector where capital is highly mobile, it is reasonable to expect that ships will service markets that offer the highest expected returns.
- Necessary to be both price and infrastructure competitive, while balancing that with the commercial returns required by infrastructure owners. If port charges mean it is too expensive to visit a particular destination, or the facilities are inadequate for larger ships or perceived as otherwise unsatisfactory, these new ships may bypass that destination, preferring other destinations that have more suitable facilities and prices.

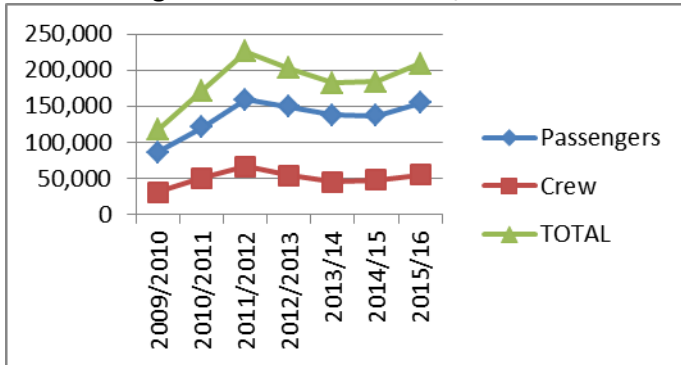
New Zealand cruise market has also seen considerable growth over the past decade.

Year/Passengers	2004/5 = 40,000	2013/14 = 211,400
-----------------	-----------------	-------------------

- Changing demographic pattern nationalities travelling to NZ. More passengers from Australia & Europe; less from USA. In 2004/05 68% international passengers American; by 2013/14 = 17% Replaced by 52% Australians in 2013.

Dunedin

- The Dunedin cruise season runs from October – April and has grown substantially over the past five years.
- **13% growth forecast for 2015/16**



Dunedin cruise growth 2009-2016 (forecast)

	2009/2010	2010/2011	2011/2012	2012/2013	2013/14	2014/15	2015/16
Passengers	86,381	120,982	159,130	148,800	137,707	136,262	154,357
Crew	31,048	50,541	66,196	54,200	44,735	47,538	54,412
TOTAL	117,429	171,523	225,326	203,000	182,442	183,800	208,769
<i>DIRECT VISITOR EXPENDITURE*</i>	\$9,336,680	\$13,235,372	\$17,402,410	\$17,950,000	\$16,920,000		
Cruise NZ Figures GDP	\$18m	\$20.8m	\$28m	\$31.5m	\$38m		

Table 1: Actual/Forecast passenger and crew numbers and economic impact for Dunedin

The forecasts and economic impact are based upon the following details:

- Dunedin currently receives approximately 82% of all cruise ship passengers who visit New Zealand. The forecast is based on data supplied by Cruise New Zealand (Cruise New Zealand 2013).
- Of those passengers who visit Dunedin approx. 90% minimum will disembark (Thyne, Henry, Lloyd 2009). The rate of disembarkation in Dunedin appears to be higher, possibly because it is either the first or last port of call for New Zealand.
- Passenger expenditure is estimated at \$125 per passenger (Tourism Tasmanian 2012-13)* Akaroa have estimated their visitor expenditure at \$124 per passenger (Christchurch/Canterbury RTO 2014). *Measured as \$136pp 2014 Dunedin
- Of those crew who visit approx. 50% will disembark for some period of time (Tourism Tasmanian 2012-13)*
- Crew expenditure variable depending upon position within the ship's company - estimated at \$45 per crew member.

*Tasmanian figures have been used because they have the most up-to date direct survey and Tasmania exhibits a close resemblance to the Dunedin situation. The expenditure figures only include spending on shore by the visitors themselves. It does not include provisioning, fuel, port charges or other charges incurred by the owners of the vessels or organised tours included in the overall cruise package. It does include organised tours, paid for on the day or on board the ship before it arrives in port. Some visitors pay for organised tours when the whole cruise is initially booked these are not included. Not all crew disembark while their vessel is in port. As such, total crew spend is adjusted to account for the large proportion (estimated to be >50%) of crew who stayed aboard.

The cruise market presents a large opportunity to grow tourism in Dunedin, both from the immediate ship passenger and crew spend and visitation, and those who return to Dunedin after the cruise (having used their cruise visit as a reconnoitre), or indeed those who recommend Dunedin as a 'must see' visitor destination to others. Cruise NZ states that up to 25% of passengers return to NZ within a year (Cruise NZ 2014 Tourism Summit presentation)

Dunedin needs to focus on the cruise visitor experience and increase visitor satisfaction.

Cruise New Zealand advises that passengers base their satisfaction on factors including:

- Iconic destination attractions
- Genuine experiences
- New Zealand made products
- Ease of access to retail opportunities
- Welcoming acknowledgement, atmosphere
- Value for money
- Shelter from the elements

The projected growth of the cruise market and competition from other ports presents challenges to the Dunedin community and industries, particularly with respect to physical infrastructure, transportation services, and service/product quality in addition to the port charges for entry to Milford Sound.

Vision

To be the premier cruise destination in New Zealand, where passengers and crew want to disembark, and after a memorable experience, they want to return.

There are three key performance indicators:

1. To maintain the disembarkation rate of an average of 90% of passengers per ship
2. Achieve a passenger satisfaction rating of 90% or more (as measured by the annual Cruise New Zealand survey).
3. To increase the average daily spend per passenger.

The Cruise Action Group is responsible for enabling the delivery of the Cruise Action Plan :

Dunedin Cruise Action Group Membership

Dunedin City Council	Enterprise Dunedin: Visitor Industry Advisor, Visitor Centre Manager, Trade Marketing/Team leader
Port Otago	Commercial Manager, Security Manager/Port Facility Security Officer
Dunedin Host	Cruise representative
University of Otago	Department of Marketing representative
Otago Chamber of Commerce	Chief Executive Officer, Chair

Strengths, Weaknesses, Opportunities, Treats

Strengths	Weaknesses	Opportunities	Threats
Condensed destination (majority of attractions within half an hour from the port)	Lack of investment in the market	Commentary on shuttles for interest groups	Ship itinerary changes
Quality attractions (as rated by passengers)	Ambivalent support from the local community	Increase the presence of the <i>i</i> -Site (both ship side and town side)	Cruise market changes
Ability of some attractions to handle large numbers	Shuttle/transport services (type, frequency)	Provide destination lecturers/on-board ambassador	Introduction of a cruise passenger tax at LPC – may turn off ships to NZ/South Island
Perceived as a safe and secure destination	No specific cruise co-ordinator (one person overseeing the industry)	To develop and provide an on-line integrated information and booking system	Lack of development of existing NZ ports
Great variety of unique tourism product	Passengers sometimes report a negative port experience/lack of shelter	Provide increased transport options from Port Chalmers (e.g. hire cars)	SH88 closures
Either the first or last NZ port for the majority of passengers	Lack of adequate passenger facilities at the port and in the central city	Provision of Otago Peninsula wharves for direct access from the ship	Development of alternative ports (for example the West Coast route) New ports – Dunedin left off
Investment in improving coach quality	Passengers and crew require regular, quality transportation to get to attractions/activities around Dunedin	Earlier arrivals into the port/late departures from the port	Significant reduction of competition in # Inbound operators handling shore excursion business; risk of the Cruise Lines taking ownership of these companies
Distance from Port to City for ship revenue & sales	Communication/promotion of Dunedin attractions/activities (through signage, visibility of <i>i</i> -Site, on-board information)	Promotion of Dunedin to the ship crew	Effects of international air services on potential passenger movements
Committed industry	Retail opening hours (specifically Port Chalmers) and service quality.	Acceptance of foreign currency throughout the destination	Economy fluctuations – influencing spending patterns Decreasing daily spend by some markets
Multiple berthing options	Attraction opening hours especially DCC owned.	Ship welcomes and farewells	Visitor trends: <ul style="list-style-type: none"> • Changes in visitor nationalities • Destination trends
Good saleable tour products for cruise companies	City parking for coaches	Developing integration with the Dunedin commercial community	Natural disasters. Risk of major maritime incident in Fiordland waters
	Adverse weather patterns	Positive PR and media on the cruise industry	Security Threat incl maritime.
	Availability of appropriate shelter for passengers/crew both at the port and in the central city (at pick up points)	Emphasising distinctive features of Dunedin	Ambivalence of wider community Public perception of environmental issues
	Octagon closures and passenger safety and access to <i>i</i> -SITE	Car hire package sales for ships	Costs of new itineraries and ports
	Capacity of attractions and effects of bottlenecks on FIT/coach visitors	Increase visitor spend	Regional council & Gov't body charges esp. Fiordland
		Ability to cater for larger ships	Lack of investment by major ports.
		Improve visitor experience	Public health outbreak
		Help operators maximise revenue	
		Increase port rating	

Guiding Principles for the Dunedin Cruise Industry

In order to develop and enhance the passenger and crew experience in Dunedin, overcome weaknesses (as outlined in the SWOT analysis), and to achieve the vision outlined at the beginning of this document, guiding principles have been developed. These principles can be summarised into the following broad areas:

1. **Develop a collective approach to the cruise industry**
2. **Develop and co-ordinate transportation and infrastructure**
3. **Be passenger and crew focused**
4. **Provide a memorable quality experience**
5. **Optimise passenger and crew expenditure**
6. **Information provision and promotion**
7. **Research and advocacy for future needs**
8. **Public Health and Safety notification**

Strategies & tactical response

The following section outlines how these principles can be achieved within the Dunedin context and the resources that are either currently available or which need to be implemented.

1: Develop a collective approach to the cruise industry

The cruise industry planning and management is based on partnerships and collaboration. This involves a variety of relevant stakeholders, including, but not restricted to, Port Otago, Enterprise Dunedin, Dunedin City Council, Otago Chamber of Commerce, Dunedin City Holdings Limited; Dunedin Host, University of Otago, Cruise New Zealand, NZ Transport Agency and key Dunedin Tourism Operators. This collective approach is collaboratively managed through the Cruise Action Group, comprising representation from lead organisations in the cruise visitor sector

The Economic Development Strategy 2013-2023, under the Compelling Destination theme, recognises the importance of the visitor economy to Dunedin and supports leveraging the visitor contribution to the Dunedin economy. The Dunedin Visitor Strategy (2008) identifies Dunedin City Council (DCC) as being the **Lead Agency** for destination management and responsible for guiding the visitor experience and operator support mechanisms, including for cruise .

Existing resources and expertise within the various Departments of the Dunedin City Council are used as many of the activities required to be undertaken fall within the functions of Enterprise Dunedin, *i*-site, Economic Development, Marketing Dunedin, transportation, city planning and presentation areas.

The recommended actions are outlined in the table below:

Action	Agency/Person responsible	Timeline	Budget
Maintain a <i>Cruise Advisory Group</i> to guide cruise industry strategy and actions for Dunedin – membership from DCC, Port Otago, Enterprise Dunedin, Dunedin Host, Otago Chamber of Commerce, University of Otago, Cruise NZ	DCC -VIA	2-3 meetings annually	Nil
Cruise Coordination activity oversight lies within the responsibilities of the Enterprise Dunedin (Business Development Advisor, Visitor Industry - VIA)	DCC	Ongoing. Cruise Action Plan updated annually	DCC funded

Co-ordinating collaboration and acting as the main contact point between the various stakeholders – adopting a “cluster” approach to managing the cruise industry members. This includes working on projects around the logistics of the cruise industry, such as, employment and training of volunteers (for example, for shuttle buses); signage around the port and the city, co-ordinating transportation to and around the city, i-Site both on the port and in the city. Conducting cruise industry briefings and industry upskilling.	DCC – VIA – i-Site	On-going 2 cruise briefings annually. Annual work plan created	Nil
Coordination and liaison with various DCC departments and organizations’ to prepare the city readiness at the least inconvenience (parking, transport, road control etc.). Embed cruise season into DCC departments planning/ budgets	DCC - VIA	Pre-season. As per work plan	Nil
Acting as interface between shipping agents, Port Otago, inbound tour operators and city for Dunedin destination management and operational issues	DCC- VIA CAG	As necessary	Nil
Co-ordinating with the DCC to ensure that a cruise policy is integrated within the Dunedin City Strategy suite and annual plan requirements	DCC - VIA	Council plan process	Nil
Liaise with residents and current and potential commercial beneficiaries to establish opportunities for retail/tourism growth and assist them with tailoring their offerings.	DCC-VIA	ED Advice clinics. Media information	Nil
Liaise and work with Cruise New Zealand to ensure Dunedin is represented and advocated as a key port.	Cruise Action Group	Annual work plan	\$5k ED + PO
Ensure Dunedin is a must see in cruise itineraries and remains profitable for cruise lines.	Dunedin Marketing	Annual Work Plan	

2: Develop and co-ordinate transportation and infrastructure

2.1 Port infrastructure

The Dunedin Visitor Strategy (2008) identifies the city’s dependence on Port Otago Ltd for investment and consideration of expansion to cater for cruise ship visitation. Port Otago is primarily a premier container port; A dedicated passenger terminal is unlikely to ever be an option because of the primary focus of the port but other alternatives which can accommodate passengers can be considered. Port Otago strategically invests and improves the passenger experience and cruise satisfaction.

Action	Agency/Person responsible	Timeline	Budget
Continually review clear and prominent signage; toilet facilities; and communication facilities	Port Otago	Annual review	
Investigate provision of covered and protected gangways and walkways (for example from weather elements) to encourage more passengers to disembark and therefore increase the potential to provide revenue for the destination	Port Otago	Annual Review	Nil
Support i-Site and booking facility at the wharf.	DCC- i-SITE, EDU. Port Otago	Annual review	

2:2 City infrastructure

Action	Agency/Person responsible	Timeline	Budget
Investigate welcome options in Octagon/Port Chalmers – seating & signage	DCC – ED VIA	2015 Octagon City seating	
Ensure adequate provision of designated space for central bus/shuttle parking	DCC – ED VIA	2015 review	Nil
Encourage welcome signage for individual ships for retailers	OCCI	Annual reminder	
Develop central city sheltered arrival and departure points	DCC – VIA	Annual review. Octagon plan 2015	Nil
Provide signage around the city identifying where attractions/activities are located (‘you are here’ signs)	DCC – VIA	City signage review 2015	
Co-ordinate city activities and events so aware of cruise (e.g. Roadwork’s and closures)	DCC – ED VIA	Annual work plan	

2.3 Transport infrastructure

Action	Agency/Person responsible	Timeline	Budget
Coordinate transport infrastructure plan for the transportation of passengers from the ship to the city, and around the city. This plan would: <ul style="list-style-type: none"> - Endeavour to get buses as close as possible to the gangway where appropriate - make provision for any displacement of existing public transport in the city 	CAG – DCC – ED VIA	2015 review with ORC bus hub plan	Nil
Encourage dedicated hop on/hop off transport options linking key retail and tourist attractions with cruise ships	DCC- ED VIA	Ongoing	Nil
Consult with the community regarding any disruption caused by the activities of the industry (such as road closures)	DCC – ED VIA	As required	Nil
Communicate transport costs/payment clearly to passengers/ Inbound tour operators before arrival (via websites)	Dunedin Marketing	2015 website review	Nil
Investigate training mechanism and encourage provision of commentary and information during transportation to & around the city to encourage increase in participation & sales	CAG/ Dunedin Host	2015	
Encourage upgrade of quality transportation provided (air conditioned coaches versus city buses)	Dunedin Host	Annual review	Nil
Work with NZTA on a plan to manage any disruptions to SH88 and minimise any effect on cruise transportation interruptions	DCC – ED VIA	Final plan March 2015	

3: Be passenger and crew focused

Dunedin needs to ensure that we welcome passengers and crew into the region appropriately. The expectation for this has been reported by both passengers and crew, and is fundamental in developing a quality experience.

Action	Agency/Person responsible	Timeline	Budget
Ensure Dunedin websites have <i>Cruise Information</i> pages that are comprehensive and consistent. Dunedinnz.com and DCC links	CAG. ED	2015 Web project	Nil
Encourage retailers to display welcome signs for both passengers and crew in their windows (designed for specific ships)	OCCI/ED VIA	Annual reminder	Nil
Develop a proposal for a programme of volunteers and roving ambassadors as visible hosts (as seen in Melbourne and Tauranga). Identify appropriate funding.	DCC –ED- i-Site	2015	Budget!
Work with retailers groups to encourage sales training and cruise readiness	OCCI- ED VIA	Annual	
Encourage retailers to provide crew discounts (to encourage their promotion of the city to passengers and other crew)	OCCI/ED VIA	Annual reminder	Nil
Develop familiarisation experiences for key crew at discounted rates (to again encourage promotion to passengers and other crew members)	Marketing Dunedin, CAG,	Annual review	Nil
Develop crew specific activities (getting them away from passenger attractions and giving them their own space, for example, at a local pub, or sporting event); Provide Information i.e. on website or crew booklet	Marketing Dunedin, CAG, Dunedin Host	Annual review	Nil
Work with attractions to ensure their opening hours and experiences offered are appropriate to cruise market and they have plans to communicate to cruise passengers	DCC - EDU	Annual updates & advice	Nil

4: Provide a memorable quality experience

The destination of Dunedin must stand out as a memorable, quality experience for cruise passengers and crew. We need to pay particular attention to what can distinguish us from other cruise destinations, and we also want to exceed passenger expectations in the service and products which we offer. This will lead to positive word of mouth resulting in repeat business (return visits) for both ships and passengers.

Action	Agency/Person responsible	Timeline	Budget
Improve welcomes and farewells for ship visits. Explore funding to enable a 'welcome project'	CAG, DCC- ED VIA	2015 welcome project	\$15k Events
Improve other visible welcoming gestures, such as signage, flags, but especially volunteer ambassadors (PC Community Board receives \$2k grant from DCC i-site budget to coordinate volunteers at Port)	CAG, Port Otago i-Site	Ongoing	\$5,000 \$2,000
Improve Octagon "welcome" atmosphere and experience and monitor by working with stakeholders including Octagon Market.	DCC-ED – VIA. City Planning & Reserves	2015 DCC Octagon trial + improvements	
Develop and promote key "flow routes" for walking visitors that link key tourist attractions and retail highlights.	DCC-ED - VIA, i-SITE, ODT Guide	Signage Review 2015	
Provide information on how to easily access banking, internet, foreign exchange and telephone services.	CAG, i-SITE, Marketing Dn, ODT Cruise Guide	Annual review	Nil
Co-ordinate opening of retail outlets with ship calls - both in Port Chalmers and in the city. Produce and distribute calendar and tips for retailers	DCC-ED VIA OCCI	Annual review & reminder	Nil
Establish quality control for providers (including provision of specific KiwiHost programmes and Qualmark accreditation)	DCC-ED VIA, i-SITE	Annual Review Pre-season	Nil
Review and develop tourism product, especially product that provides a uniquely Kiwi and/or Dunedin experience. E.g. Maori cultural experience, local cultural experience, doing what the locals do (bars, cafes etc.)	DCC- ED VIA	Annually April	Nil
Provide operator support, access to opportunities and training to enable visitor industry to provide quality experiences	DCC- ED	Annual programme	
Embed accessible information for disabled passengers into the visitor information and experience	DCC Enterprise Dunedin/ED VIA	2015 review	
Liaise with Cruise NZ partners and other ports to improve NZ cruise experience	DCC-ED	Ongoing. 1 annual meeting	

5: Optimise passenger and crew expenditure, to maximise cruise's contribution to Dunedin GDP

Research which has previously been undertaken within a New Zealand context on passenger demand and expectations, determined that a number of passengers were willing to spend more than what they actually ended up spending, at the destinations they visited.

We brought money with us and we are going home with money because we can't spend it anywhere. (passenger – Dawn Princess).

Passengers overwhelmingly discuss the fact that they want to buy something "New Zealand" which is made in New Zealand – particularly if Dunedin is the last port of call.

Action	Agency/Person responsible	Timeline
Develop and provide maps clearly outlining where money can be withdrawn and spent, especially on uniquely New Zealand or Dunedin items (fashion, art, New Zealand made souvenirs, trinkets). Encourage local retailers to stock locally made goods.	Private Enterprise Encouraged by DCC & OCCI	Annual review. Industry updates
Encourage exploration and enablement of option of dedicated "shopping shuttle" as part of transport infrastructure from ship-side.	CAG	Annual feedback

Provide/communicate foreign exchange facilities e.g. shops should advertise the fact that they can accept foreign currency. We must make it easy for passengers and crew to spend their money regardless of currency type	DCC-ED- i-Site Dunedin Marketing website	Annual review
Ensure the crew are aware of local bars, restaurants and supermarkets – this is where they are going to spend their (foreign) currency (often away from the passengers). Provide crew map/information	Private enterprise Encouraged by DCC & OCCI	Ongoing
Take advantage of free and independent travellers (FITS) – provide a booking system and services (either online or at the port) to arrange their own activities or visits to attractions.	i-SITE	Annual review. 2015 web upgrade
Develop business case for cruise lines that would see ships staying in port longer (arriving earlier or leaving later) Plan for when they do stay	CAG	2015 plan for o/night stay
Work with visitor and retail industry to encourage sales training ‘Master of sales’, to maximise sales opportunities	DCC- ED VIA/ OCCI	2015
Work with visitor industry using up to date research on customer preferences to optimise offerings to cruise passengers and develop new product to increase sales	DCC – ED VIA	Annual Updates
Work with visitor industry operators to enable them to maximise business opportunities and yield from cruise and increase profitability	DCC- ED VIA	Updates & individually
Encourage visitors to come back to Dunedin – provide deals and ongoing communication. 25% come back to NZ	Dunedin Marketing	2015 plan

6: Information provision and promotion

Information on passenger needs to be investigated and communicated with the visitor industry so they can be cruise-ready and provide experiences that passengers wish to enjoy. The options available need to be clearly available in-market to the cruise visitor. Opportunities exist to encourage cruise visitors to return

Action	Agency/Person responsible	Timeline	Budget
Develop information on ship demographics so that services/personnel can be customised to particular passenger/crew needs (age, language, culture); share with industry. Information available from Cruise NZ	ED VIA CAG	Annual update	Nil
Develop information on passenger preferences and motivations for getting off ship including age, purpose, FIT or organised traveller to inform local industry so they can tailor product offerings to suit.	ED - Dunedin Marketing CAG, University	Annual Update	Nil
Improve visibility of the i-Sites on the port and in the central city, both with respect to the physical facility and the staff profile	DCC – i-SITE	Annual review	(see 2.1)
Regular liaison with Cruise New Zealand, cruise lines and in-bound tour operators to promote city attractions, activities and offerings	Dunedin Marketing	Annual Plan	Nil
Build a campaign and collateral to encourage visitors to return	Dunedin Marketing	2014/15	
Encourage a system to better inform on board lecturers – hosting, information provision.	ED Dunedin Marketing?	2014/15	
Cruise Dunedin stakeholder web hosted database CRM set up to enable better communication	ED - VIA	2015	
Visit cruise lines to maintain and encourage Dunedin/Port Chalmers Visits	Port Otago/ Dunedin Marketing	2015 plan	

7. Research and advocacy

Establish a research programme to inform future trends and market needs. This would also add weight to any planning and advocacy for the cruise and visitor industry.

Advocate for cruise and visitor industry acceptance and support by residents, stakeholders and Council.

Action	Agency/Person responsible	Timeline	Budget
Build a research database to share with visitor industry and enable informed future decision making – should live online. Include – broad future trends for the world and NZ (available through Cruise NZ), Update industry through briefings.	DCC- ED	2015 website project	
Establish specialised research on buying behaviour of cruise passengers	ED with Otago University	Annual measurement	
Promote benefits of cruise visitors to stakeholders including positive media stories, annual presentation to council	DCC-ED VIA. CAG	Annual updates	
Annually provide fast facts and key stats to Cruise Action Group to share. Prepare and distribute agreed partner communications and messages pre-season	DCC-ED VIA	Annual pre season	
Advocate for development of NZ ports	CAG	Ongoing	
Membership of Cruise NZ and advocate for cruise to be recognised as an industry/key visitor segment by Tourism NZ	CAG	Annual	

8: Public Health and Safety

Action	Agency/Person responsible	Timeline	Budget
Health and safety due to noro-virus – information to stakeholders to manage risk	Medical officer. Dunedin Host, CAG	Added Op info 2014	
Missing persons/accident/ illness: Develop a communication system to ensure smooth management of any incidents.	CAG, DCC-EDU	2015	

9. Measuring the impact of recommendations outlined in the cruise strategy

The following means of measurement should be completed to ensure the actions undertaken within this strategy are delivering discernible impact and the results anticipated.

Measure	Agency/Person responsible	Timeline	Budget
1. Measuring passenger/crew expenditure during visits	Enterprise Dunedin	Two-yearly	\$5,000
2. Measure turnover change within local companies/organisations (in line with OCCI quarterly business survey)	OCCI/DCC-EDU	Annual	Nil
3. Measure passenger/crew satisfaction	Cruise NZ/ ED through ODT guide.	Annual	Nil
4. Measure cruise company/agent satisfaction (incl in-bound tour operators) Verbal feedback	Cruise NZ. Dunedin Marketing	Annual	Nil
5. Measure berth/disembarkation times to ensure operational efficiency at the Port	Port Otago	Annual	Nil

Key Cruise Industry partners and areas of Responsibility

Port Otago Limited

- Berthing/disembarkation
- Security
- Wharf presentation
- Passenger transit facilities

Dunedin City Council – Enterprise Dunedin

Council consideration of cruise in planning and strategies.
Support visitor industry & cruise via Economic Development Strategy - Compelling Destination, Business Vitality themes.

Dunedin Marketing

- Marketing to inbound operators to include Dunedin tourism operators in Cruise Ship packages
- Information to tourism industry around cruise market demand
- Familiarisations for inbound operators/product buyers and crew
- Information for visitors, collateral/ website

Economic Development Unit

- Lead Destination Management
- Business Development Advice and operator support

i-SITE Visitor Centre

- Information Centre on wharf and in city
- Volunteers/ambassadors

DCC – Transportation Planning and Parking

- Designated cruise shuttle parking
- Road closures and Traffic Management Plans

DCC – Events

- Ship welcomes and farewells
- Octagon market (DCC Reserves own licence contract)

Dunedin Host

- Advocate for visitor industry
- Targeted networking and training

Transport Operators

- Shuttles into City, commentary, info for visitors
- Charged for road closures and Traffic management Plans

Otago Chamber of Commerce

- Business representation and advocacy
- Work with shop owners/retailers
- Training provider

University of Otago

- Research
- Presentations

Port Chalmers Community/Business Community

- Volunteers
- Chalmers Community Board

New Zealand Transport Agency

- Enables key SH88 access
- Safer Journey mandate
- Monitors operator compliance

Cruise Stakeholders



References

Access Economics Pty Limited (2008) Economic Contribution of the Cruise Shipping Industry to Australia, Access Economics, Sydney
Cruise New Zealand (2010) Presentation to strategy meeting, Dunedin
Dunedin City Council (2008) Dunedin Visitor Strategy 2008 – 2015, Dunedin
Tourism New Zealand (2008) Cruising New Zealand, Tourism New Zealand, Wellington
Thyne, Maree, James Henry, Nikki Lloyd (2009) Cruise Industry Report, Dunedin
Tourism Tasmanian (2009) Tasmanian Cruise Ship Results 2008-2009, Hobart
Ward, Douglas (2009) Complete Guide to Cruising & Cruise Ships, Berlitz, London
Ward, Douglas (2010) Presentation to International Cruise ship Conference, Plymouth

¹ The original 2011 strategy was drafted by Dr Maree Thyne and Dr James Henry, on behalf of the Dunedin Cruise Industry, based on information and strategies developed during an industry forum held in May 2010. Specific research undertaken on the industry by Dr Thyne, Dr Henry and Nikki Lloyd has also been utilised. This version has been developed in consultation with the Dunedin Cruise Industry.

New Zealand Forecasts

