



KANTAR

Consumer insights to support development and implementation of the Milford Opportunities Project Masterplan

New Zealand market insights

May 2023

Business objective

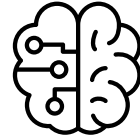
Understand New Zealanders' views of the Milford Opportunities Masterplan, perceptions of its impact on domestic tourism, and New Zealand more broadly

Background

- Milford Sound / Piopiotahi is one of Aotearoa New Zealand's premier visitor attractions and an iconic destination, that had been attracting around 870,000 visitors a year before the Covid-19 pandemic
- The large number of visitors to the area, projected to grow to 1.1 million visitors by 2030, and 2 million visitors by 2035, is putting too much pressure on the natural environment, local infrastructure and roads
- To address these challenges, the Milford Opportunities Project (MOP) has been set up with the objective to reimagine visitor management in the Milford Sound / Piopiotahi area and ensure the area is protected now and into the future
- To enable further development and implementation of the MOP Masterplan, domestic consumer insight is required in order to:
 - Understand how the Masterplan might be received by the New Zealand public, particularly among Southland and Queenstown residents, and their perceived impacts of the Masterplan on domestic tourism, and Aotearoa New Zealand broadly
 - Understand the opportunity and risks with the proposed changes to visitor management and, whether it aligns with expectations and needs of visitors in the area
 - Understand the perceived impact of the Masterplan on New Zealand's economy, society, environment, and culture
- **This report focuses on the research insights for the domestic market, with insights for the international visitors presented in a separate report**

Quantitative and qualitative research was conducted to fully deliver to MOP's objectives

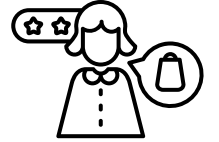
Quantitative research



- A 15-minute online consumer survey to answer key research questions:
 - Size the potential impacts of the Masterplan on domestic tourism
 - Evaluate NZers' sentiments towards the Masterplan and its expected impacts on the country's economy, society, environment, and culture
 - Evaluate the sentiment towards the plan among residents of Southland and Queenstown, specifically

- N = 1000 total to reflect the demographic representation of New Zealand⁽¹⁾, with
 - n = 150 residents of the Southland region
 - n = 100 residents of Queenstown Lakes District
 - n = 100 NZers identifying as Māori ethnicity

Qualitative research



- Qualitative research to add depth to the domestic survey:
 - Explore the ideal “Milford Sound / Piopiotahi” visitor experience
 - Add significant depth to feedback on the Masterplan's propositions
 - Explore how NZers, and Southland and Queenstown residents specifically, feel about the Masterplan and its likely impact on the local and national economy, society, environment, and culture

- 4 online focus groups, with a total N = 24 respondent split by:
 - n = 12 NZers considering travelling to Milford Sound / Piopiotahi, who have not previously been
 - n = 6 NZers who have been to Milford Sound / Piopiotahi in the last 2 years
 - n = 6 Southland residents, who live relatively close to Milford Sound / Piopiotahi (Te Anau, Fiordland, Queenstown, etc.) but are not necessarily impacted by it on a day-to-day basis

- Mix of household composition, ethnicity, gender, income

Top 7 insights and considerations on the Masterplan

- 1 NZers take great pride in the natural beauty of our country, especially in the South Island where untouched nature is abundant, and Milford Sound / Piopiotahi is widely recognized as an icon of New Zealand – this pride fuels **New Zealanders' determination to preserve it for the future**
- 2 The Masterplan, aimed at protecting the environment and providing world-class experiences, is generally well-received by most NZers, including Southland and Queenstown residents, with **the majority agreeing that it offers visitors an opportunity to participate in preserving Milford Sound / Piopiotahi**
- 3 The Masterplan is widely perceived to have a positive impact on the four capitals – Nature, Economy, Culture, and Society, with **the majority of NZers believing it will generate economic growth, employment opportunities, and increased investment**, leading to significant improvements in the area
- 4 Commercialisation of Milford Sound / Piopiotahi is a strong concern, and thus, any change therefore must feel discreet, with minimal impact on visitors – **NZers want a "Less" approach** to create a better visitor experience that **prioritises nature and cultural preservation**
- 5 The primary **concern** with the Masterplan is its **ability to effectively restore the environment**, as there is a sense of distrust and apprehension in its execution – this means in communicating the plan, it will be crucial to emphasize plans for ongoing feasibility testing, consultation, and reassessment to ensure the longevity and sustainability of the proposed changes
- 6 There is also a concern that the **cost of implementation** would fall on NZers, and Southlanders in particular – a key concern to alleviate with clear communications on how the funds will be generated and managed
- 7 There are some concerns that implementation of the Masterplan could lead to an increase in the cost of living for locals in Te Anau and pose challenges for local tourism operators and iwi – such **perceived impact to locals, iwi, and tourism operators must be proactively managed and mitigated where possible** when implementing the plan

The Masterplan propositions: key considerations for implementation

International visitor access fee	<ul style="list-style-type: none">– The majority of NZers, and residents of Queenstown in particular, are supportive of and appreciate that the visitor fee is limited to international visitors, with many considering it overdue, especially given Milford Sound / Piopiotahi's is part of a World Heritage site.– While NZers support the reinvestment of the funds in the preservation of the area, it is important that the generated funds are utilized for improving infrastructure – 'better' not 'more'– There were concerns that the fee might discourage international visitors from visiting Milford Sound / Piopiotahi, potentially negatively impacting the local economy and local tourism operators
Prohibiting cruise ships and removing aerodrome	<ul style="list-style-type: none">– The majority of NZers support the proposed changes to access to Milford Sound / Piopiotahi, including the ban on cruise ships, due to concerns about their environmental impact and obstructing views of the natural surroundings– Although in a minority (17% of NZers), those who oppose the ban on cruise ships are concerned the proposed changes will negatively impact local tourism operators – this is possibly largely stemming from the misbelief that cruise passages disembark and spend time in the area– The proposition to remove the aerodrome is met with scepticism, with some perceiving trade-offs with helicopters are potentially more damaging to the environment
Managed access / transportation with Te Anau as a visitor hub	<ul style="list-style-type: none">– The proposed managed transportation options when visiting Milford Sound / Piopiotahi is well-received by most NZers, although Queenstown and Southland residents lean more towards self-driving preferences– Managed access is perceived to be safer, environmentally friendly, and conducive to a more enjoyable experience, while also receiving support for its aim to reduce congestion through hop-on/hop-off buses and diverting traffic from Queenstown– However, there is a view that the concept of managed access is predominantly intended for international visitors rather than domestic travellers, as NZers want unrestricted access to Milford Sound / Piopiotahi; in addition, there are significant concerns about the insufficient infrastructure in Te Anau to handle an influx of tourists and the resulting impact on the local community

The Masterplan propositions: key considerations for implementation (cont'd)

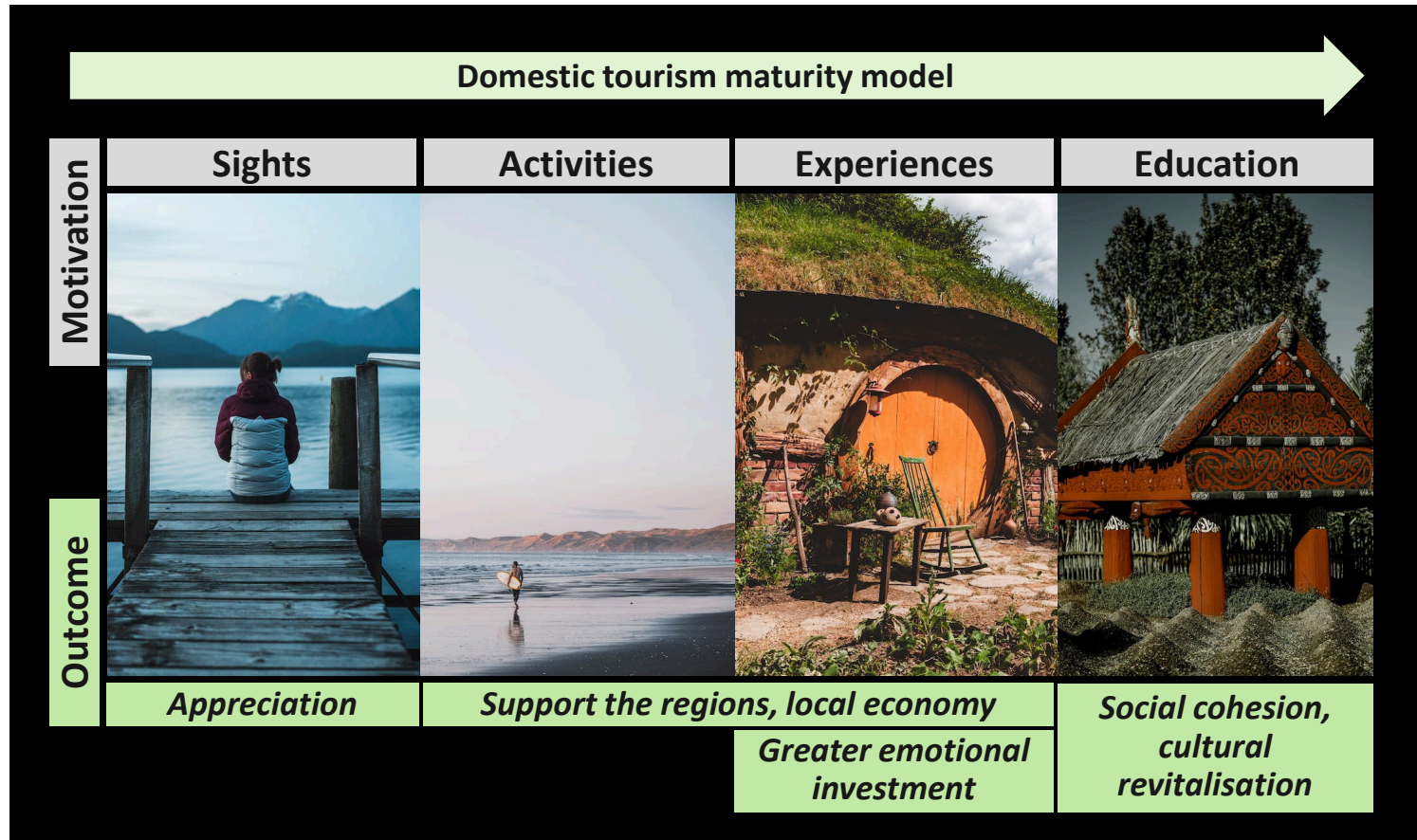
Develop enhanced nature and cultural experiences	<ul style="list-style-type: none">– The idea of the proposed improvements in landscape, nature, and cultural experiences at Milford Sound / Piopiotahi is appreciated by NZers – particularly the concept of sustainable infrastructure and the integration of Māori culture– This connection to Māori culture is a way to enrich the experience and promote education, and garner a deeper appreciation of the land – in implementing, consultation with iwi is key to ensure authenticity and that Māori culture is represented with integrity and credibility– There is some resistance towards an excessive emphasis on culture, with some believing that other locations in the country are more suitable for offering a cultural experience
Develop multiple experiences along Milford Road	<ul style="list-style-type: none">– The idea of offering multiple experiences along Milford Road is highly likeable, and for a significant proportion of NZers the proposition is likely to improve their consideration to visit Milford Sound / Piopiotahi– Diverse accommodation options, additional walkways and variety of activities would provide compelling reasons to visit– The key tension with the proposition is the potential increase in visitor numbers and over-development leading to environmental damage
Harness sustainable practises and green technologies	<ul style="list-style-type: none">– Including sustainable practices and technologies in the development of the area is widely appreciated by NZers, as it is perceived to be an important action for preserving the beauty of Milford Sound / Piopiotahi and its long-term sustainability– It is important that these developments are carried out with care and strive to harmonise with the natural environment as much as possible
Governance	<ul style="list-style-type: none">– The proposed collective governance model is somewhat liked with some scepticism toward it - overall it is seen to be involving the most relevant and invested stakeholders for governing the area– While there are concerns about practicality in implementing this proposition, a key consideration for successful implementation is to ensure all parties are equally represented

1

Motivations and
barriers to visiting
Milford Sound /
Piopiotahi



There are numerous reasons why NZers travel within New Zealand, but there is an increasingly noticeable desire to support, discover and explore our country in greater depths



- Similar to international visitors, NZers are showing a greater desire to experience travel destinations in a greater depth and in an immersive way
- **Instead of passively seeing a destination, NZers are now taking a greater interest in education, and understanding the destination in greater depth**
- Two factors contributing to this shift in behaviour are:
 - Covid-19 lockdown created a realisation that our backyard is full of beauty and opportunities to learn
 - Increased awareness and interest in Te Reo Māori and Māori culture

NZers' pride in Aotearoa's natural beauty spurs determination to preserve it for years to come – particularly in the South Island, where untouched nature is felt to be in abundance

Natural beauty is recognised as New Zealand's greatest asset. New Zealanders are proud of our nature and want it to be preserved for decades to come.

These feelings are heightened when New Zealanders think of the South Island, where unique, untouched nature is perceived to be in abundance. The South Island is regarded as a 'slice of paradise' and is famed for its wide-open spaces, endless nights, diversity of activities and landscapes, and its relaxed, slower-pace lifestyle.

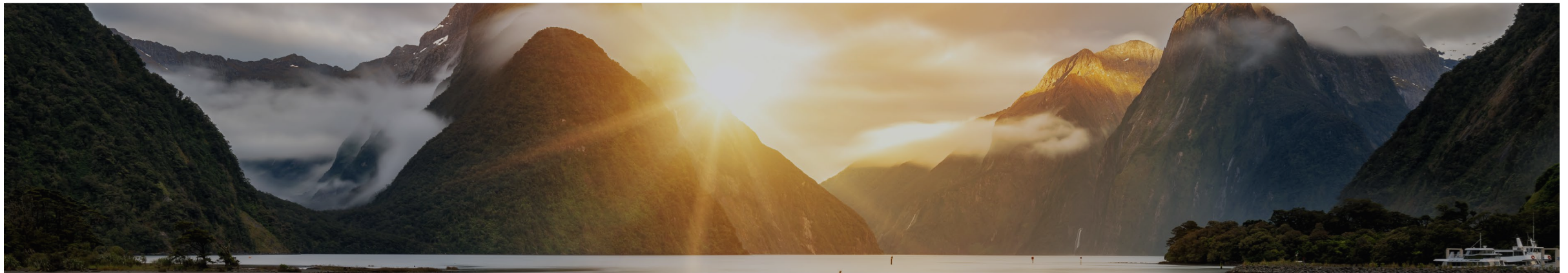
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“Auckland could just be another city, but the South Island is quintessential New Zealand.”

– Considering visiting Milford Sound / Piopiotahi, family

“The South Island is like a different country. It is so unique, with untouched natural landscapes and beauty. It feels remote, yet family-friendly.”

– Previous visitor to Milford Sound / Piopiotahi



The evolution in respect and appreciation of New Zealand's indigenous culture has led to a growing expectation that Māori culture is present in our National Parks in a meaningful way

For many New Zealanders, the mainstreaming of Māori culture has led to **greater expectations regarding the visibility and acknowledgement of Māori culture** at destinations around the country.

Many Kiwis are looking for Māori culture cues and education to better understand our history.

The growing appreciation for Māori culture has also led to a baseline **expectation that a destination's consultation with local iwi will be full and meaningful** – particularly when in relation to how to authentically educate visitors on Māori culture.

“

“Nowadays when I travel around New Zealand I’m looking to learn more about indigenous plants, our history, and local iwi. It enriches the experience and I walk away with a better understanding of that place.”

– Considering visiting Milford Sound / Piopiotahi, family



When visiting a New Zealand destination, NZers wear two hats – considering both their personal experience, as well as the impact on New Zealand

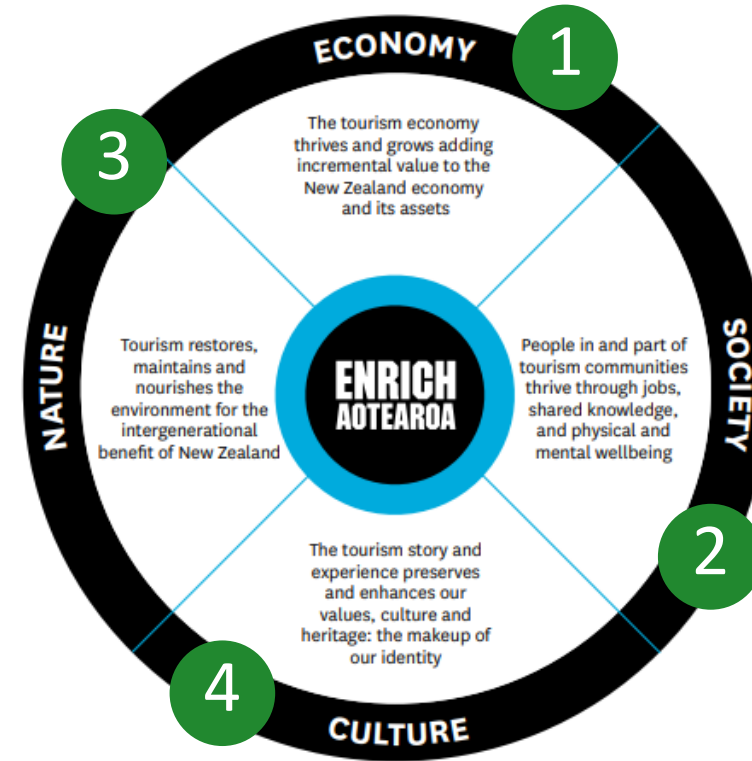
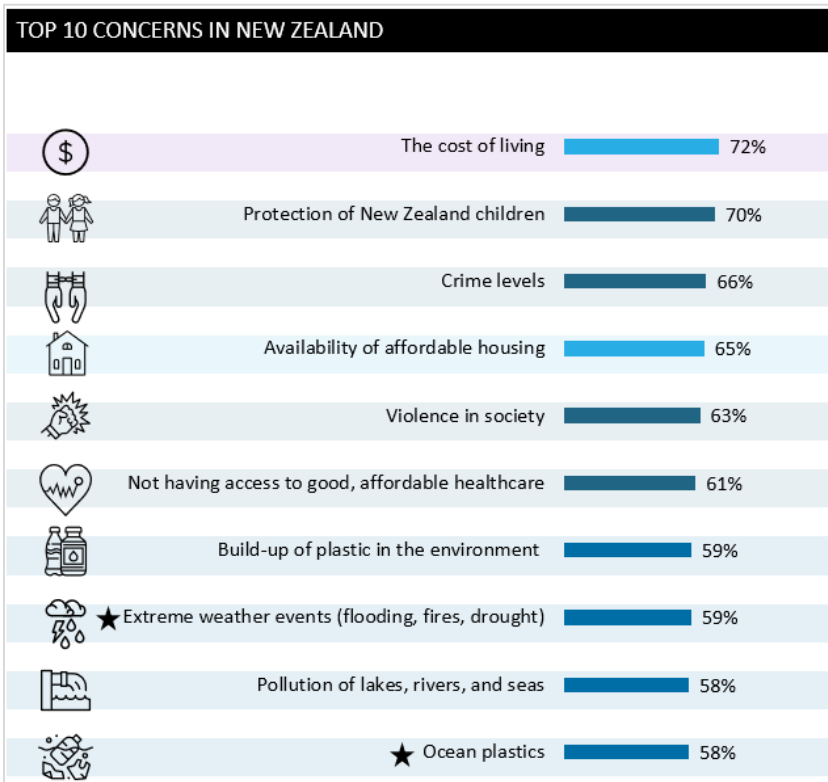


- Cost of activity and/or holiday
- Enjoyment of experience
- Personal growth & education

- Economic sustainability, impact on local businesses
- Environmental conservation & preservation
- Cultural sustainability

Typically, personal experience and 'ME' is most important in weighing up travel destinations – however in rationalising their decisions and behaviour, people default to the impact on the country, 'WE'.

And, at present, the increased concern for cost of living means that NZers are acutely aware of the personal cost to travel, as well as the impact on the economy in their travel decisions

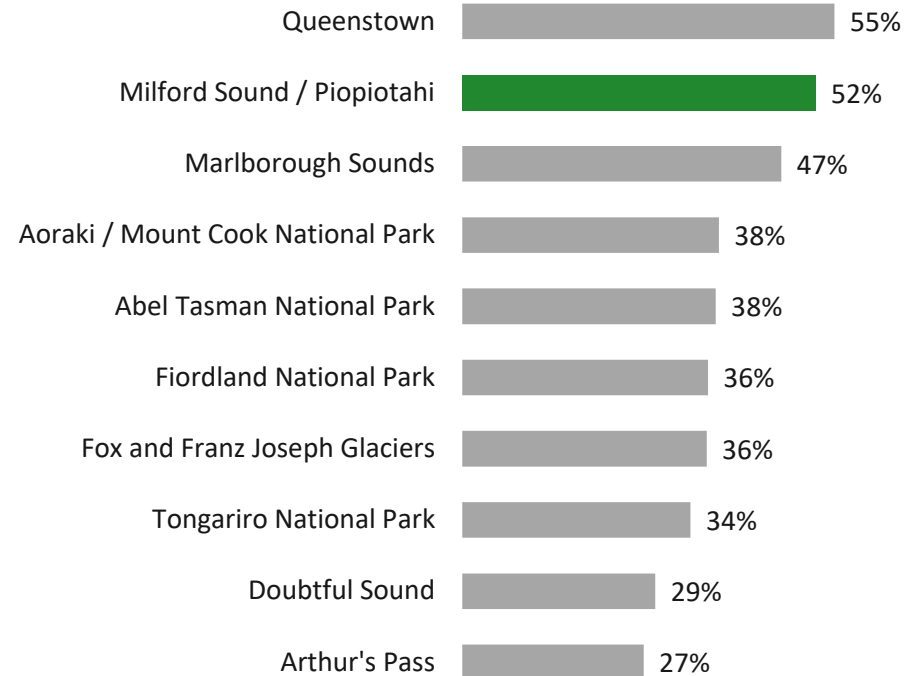


The heightened concern for personal cost, as well as impact on the economy, is the lens in which Kiwis are evaluating the Masterplan

However, while cost is a top concern, we know that social, cultural and environmental sustainability are other salient issues – with care for those concerns reflected in New Zealanders response to the Masterplan as well

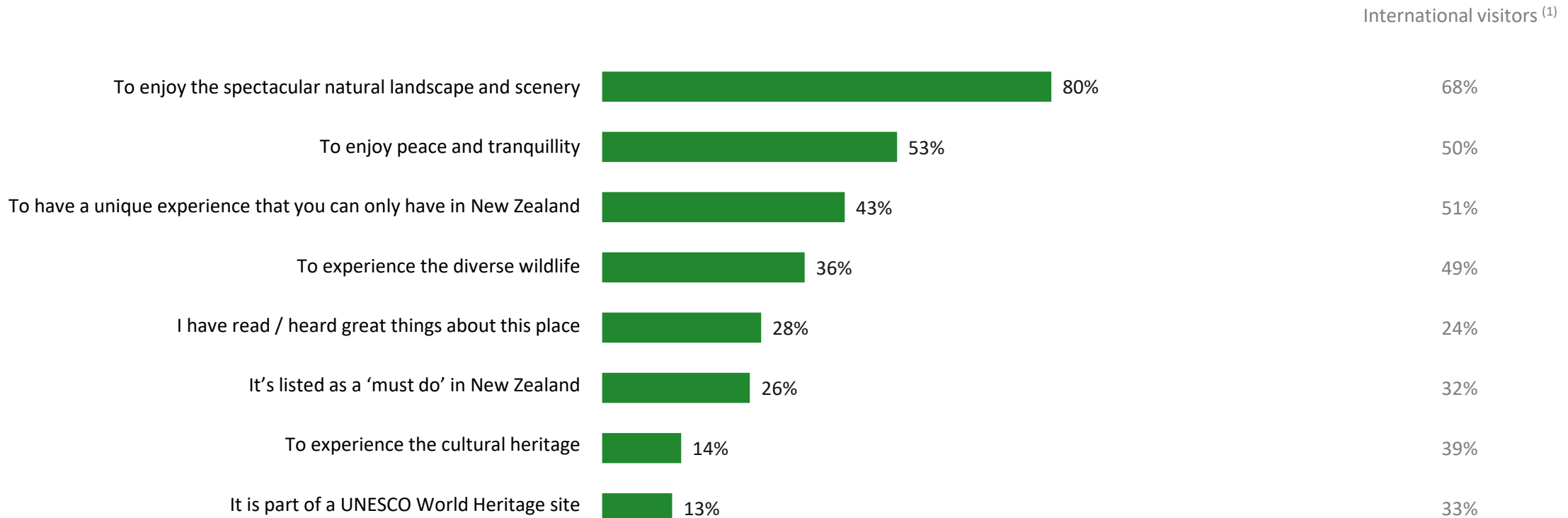
Milford Sound / Piopiotahi is undeniably synonymous with New Zealand, and many NZers are eager to visit the National Park

Top 10 New Zealand National Parks and scenic landmarks NZers are interested in visiting (% All NZers)



The breathtaking natural scenery is the main drawcard for Milford Sound / Piopiotahi – being a ‘must do’ experience and a part of a UNESCO World Heritage site are less important to NZers, especially when compared to international visitors

Reasons to want to visit Milford Sound / Piopiotahi (% interested in visiting after presented with a full description of the place)



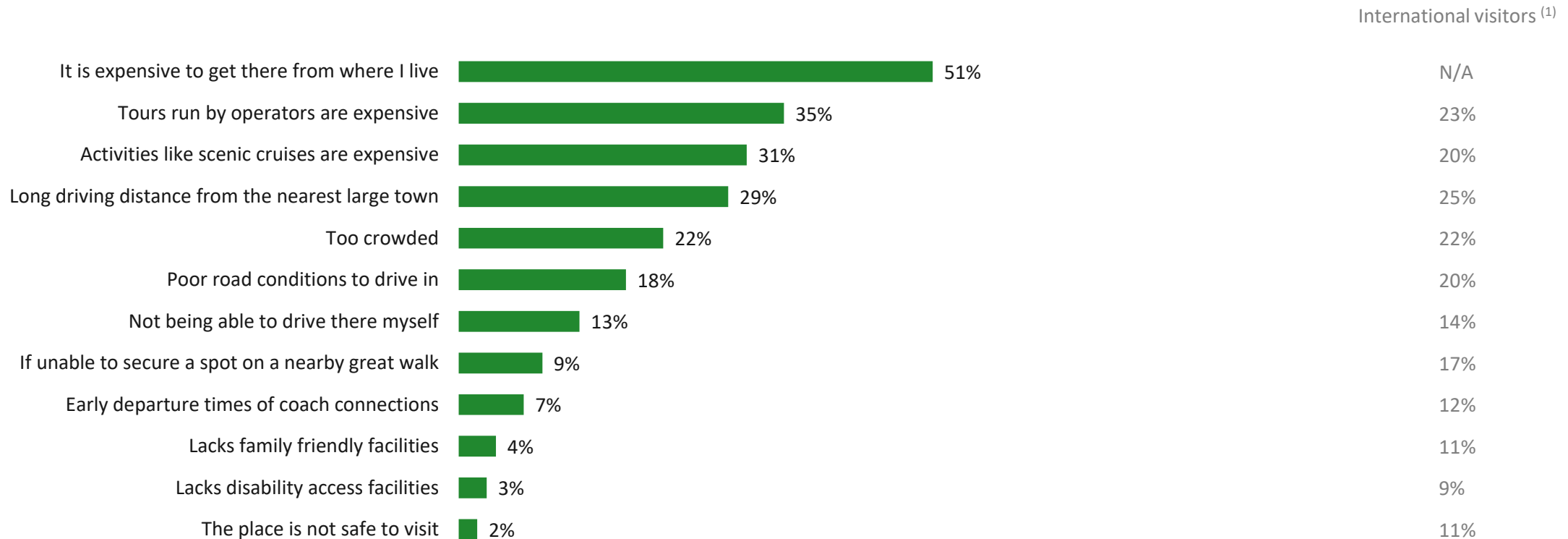
Base: n = New Zealanders interested in visiting Milford Sound / Piopiotahi 894

1: A simple average across visitors (AU, UK, US, DE, CH, JP, IN) based on n = 700 respondents per market with a mix of future and past visitors. The average does not take into account the size and potential of the market in terms of visitors. Reported here to provide an indicative overall view

Q: Why are you interested in visiting Milford Sound / Piopiotahi?

While cost factors are the main barrier for NZers to experience Milford Sound / Piopiotahi, long driving distances and concerns about overcrowding are also significant deterrents

Top 10 barriers to visiting Milford Sound / Piopiotahi



Base: n = All New Zealand 1,000

1: A simple average across visitors (AU, UK, US, DE, CH, JP, IN) based on n = 700 respondents per market with a mix of future and past visitors. The average does not take into account the size and potential of the market in terms of visitors. Reported here to provide an indicative overall view

Q: What might cause you to hesitate or reconsider a visit to Milford Sound / Piopiotahi?

2

Visitor expectations of the Milford Sound / Piopiotahi experience



NZers expect that Milford Sound / Piopiotahi is bursting with pristine, untouched natural beauty

When New Zealanders think of Milford Sound / Piopiotahi, there is a strong expectation that the experience is rooted in beautiful, untouched nature. New Zealand is famed for its natural beauty, and Milford Sound / Piopiotahi is the destination seen to represent New Zealand on both the domestic and international stage.



New Zealanders expect that Milford Sound / Piopiotahi has:

Rugged, untouched natural experiences

Pristine nature

Isolated, quiet, open spaces

A mysterious, intriguing aurora

Postcard-like iconic NZ imagery



“4 days worth of activities”

Idyllic landscapes

Real, raw, unfiltered beauty

“Once in a lifetime trip”

While not a key driver of visitation, New Zealanders also expect Milford Sound / Piopiotahi to foster greater cultural connection to the land

It is expected that New Zealand destinations have a level of cultural connection embedded in the experience – whether that be simple acknowledgement or greater education on the heritage and cultural history.

For Milford Sound / Piopiotahi, nature and natural beauty is the primary expectation, however **culture is expected at a baseline level at least, and it is seen to contribute to a more enriching experience.**

“

“I expect Milford Sound / Piopiotahi to draw on the whole history of the area, and mana whenua. It’s 2023.”

– Considering visiting Milford Sound / Piopiotahi, family



However, patterns of New Zealand tourism development incite concerns that Milford Sound / Piopiotahi, in reality, has become a tourist destination where profit comes first

NZers are laden with scepticism that Milford Sound / Piopiotahi could instead be a tourist destination where profit comes first

New Zealanders have experienced tourist destinations become spoiled through over-commercialisation and development, and a focus on profit vs. preserving the natural landscapes.

Rotorua was mentioned as a destination that has lost its 'spark,' through its focus on international tourists.

These previous experiences and patterns lead NZers to worry that Milford Sound / Piopiotahi and its unmatched natural beauty could be diluted through further development.

Thus, there is a risk that any further development through the Masterplan could amplify this sentiment.

“

“I feel like an overseas tourist when I’m in Rotorua now. All of the development lost what made it special.”

– Considering visiting Milford Sound / Piopiotahi, family



NZers strongly believe that Milford Sound / Piopiotahi should be a destination that focuses on 'Less' to create a better visitor experience by fostering nature and cultural experiences that protect and preserve the area

 LESS
BETTER

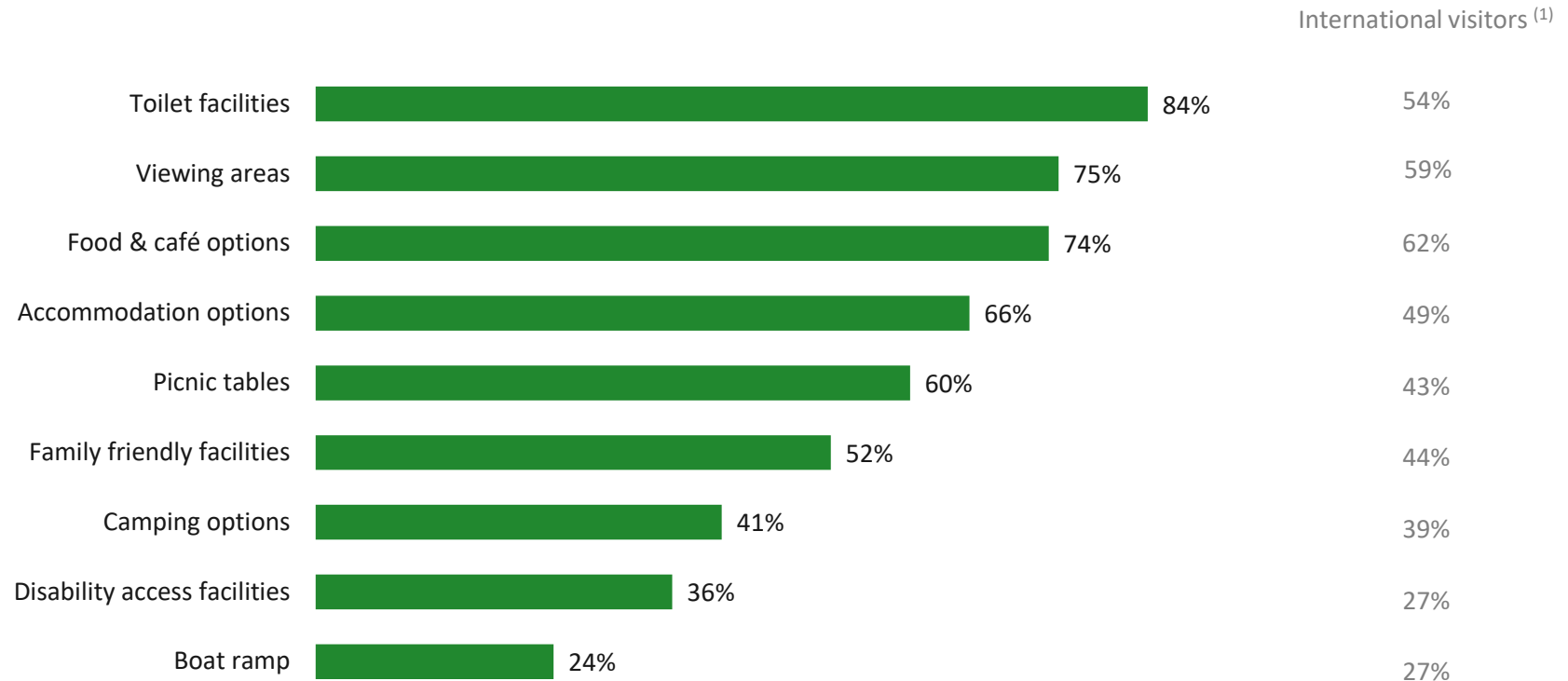
MORE
WORSE 

- Natural, authentic, uncommercial experience
- Better infrastructure
- Connection to culture & place
- Investment into the environment & behaviour that puts the natural ecosystems first
- Commercial, profit-focused, over-developed
- More infrastructure
- Inauthentic, ungentuine attempts of showing culture



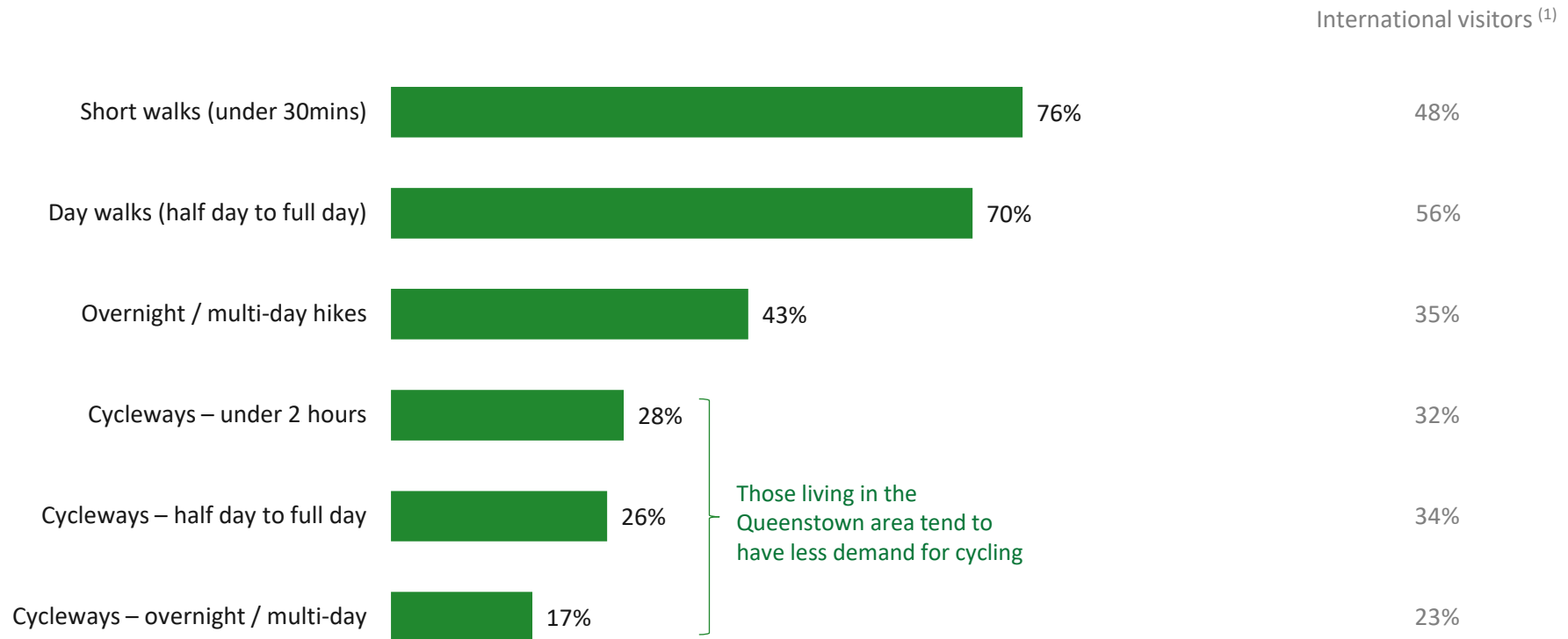
Toilet facilities, viewing areas and food and café options are the main core facilities NZers expect at Milford Sound / Piopiotahi, which is consistent with expectations among international visitors

Core facilities visitors expect at Milford Sound / Piopiotahi



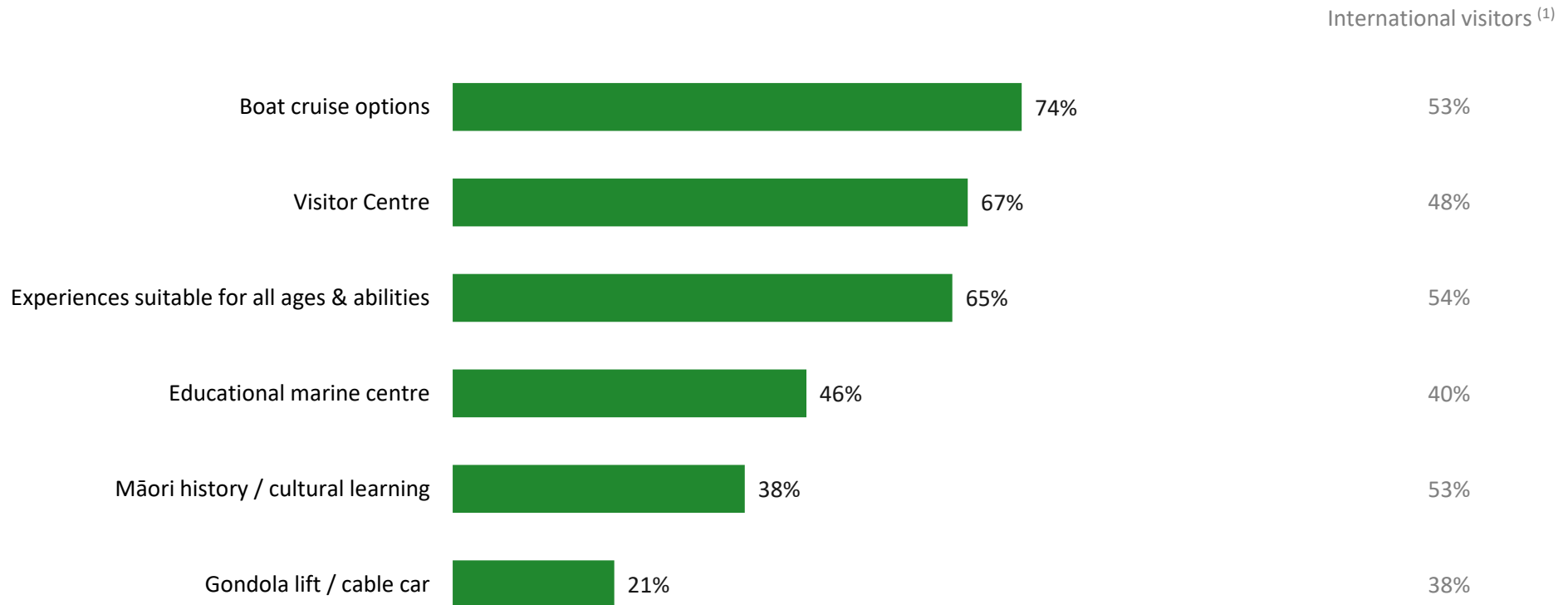
Most NZers expect to be able to do day walks and shorter walks rather than overnight / multi-day hikes, with even less demand for cycleways – this is consistent with expectations among international visitors

Types of walks and cycleways expected at Milford Sound / Piopiotahi



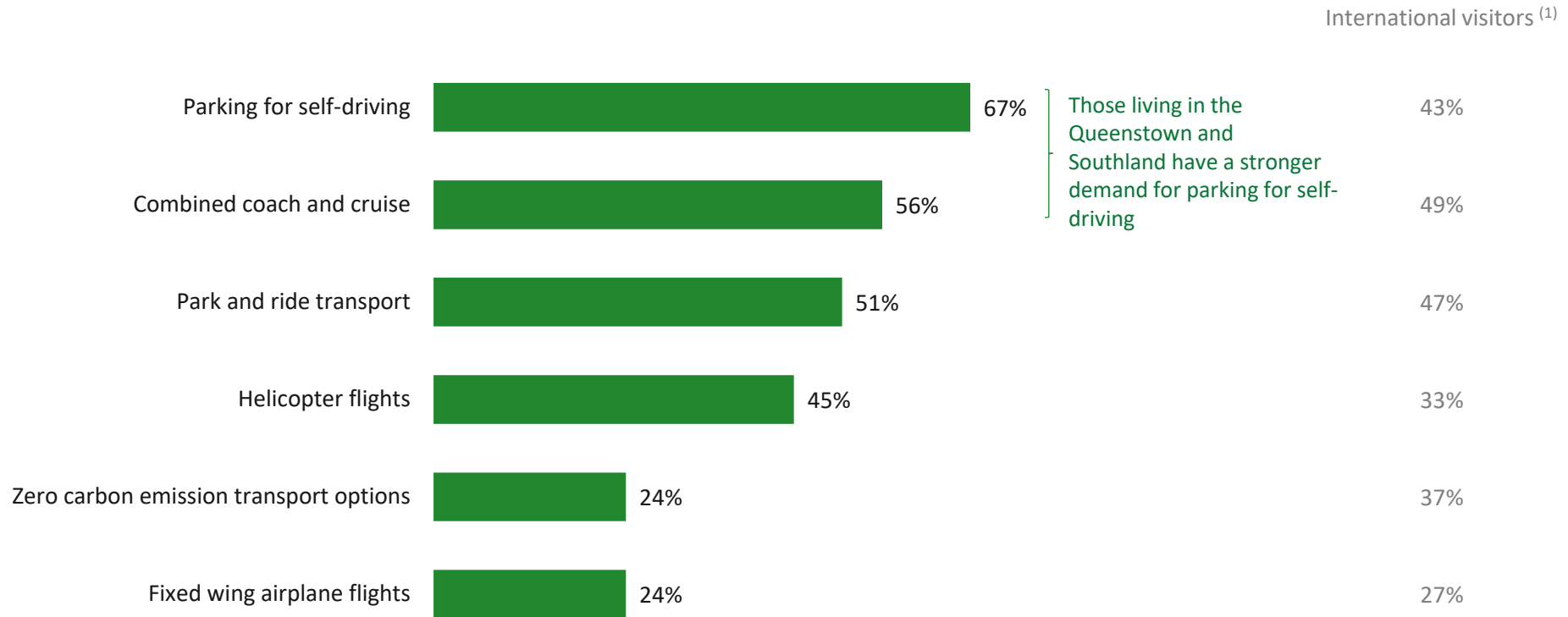
Boat cruise options and a visitor centre are widely expected at Milford Sound / Piopiotahi – there is also solid demand for history and cultural learning experiences, although to a lesser degree than international visitors

Types of experiences expected at Milford Sound / Piopiotahi



Parking for self-driving is the most expected transportation option for NZers, but there is also an expectation of the combined coach and cruise options

Types of transportation options expected at Milford Sound / Piopiotahi



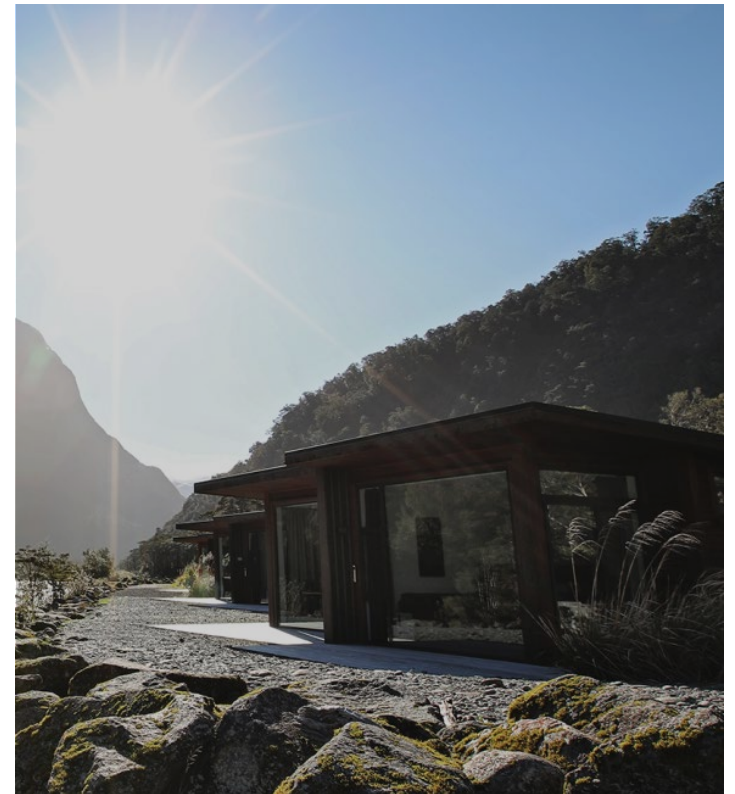
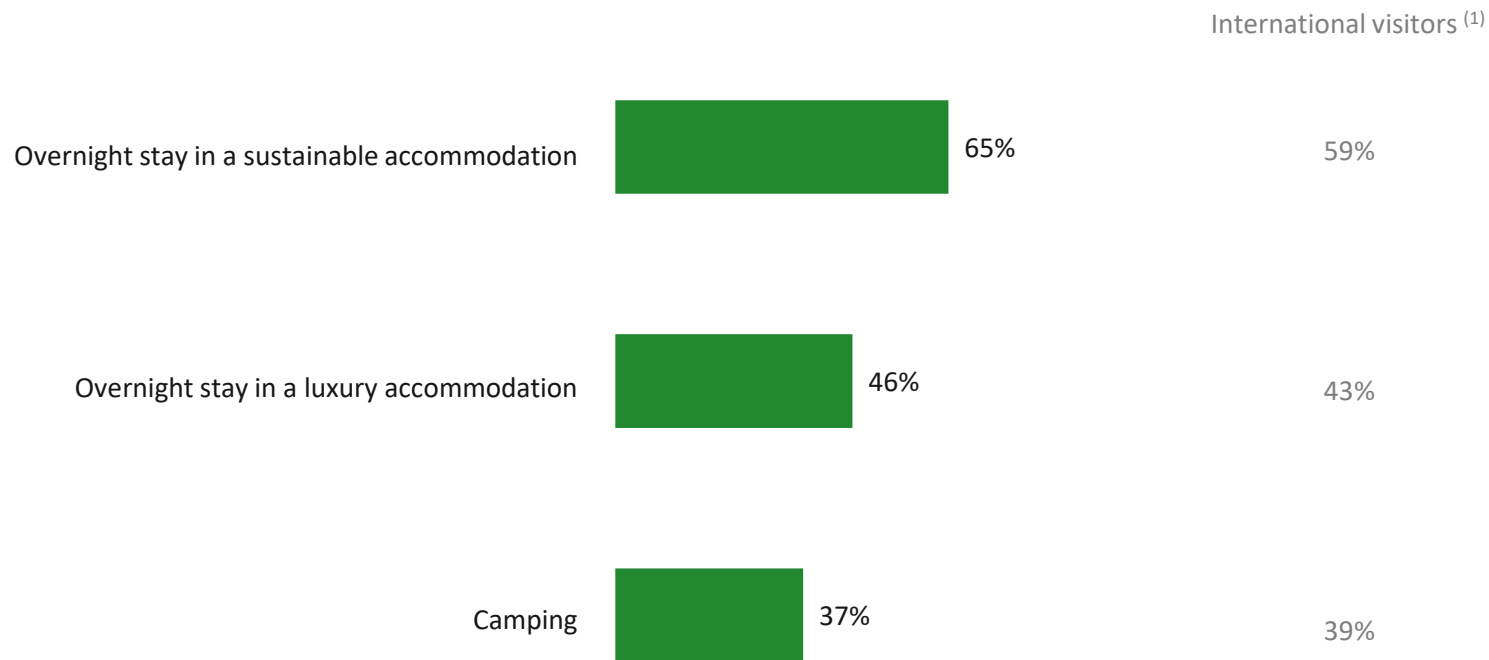
Those interested in visiting Milford Sound / Piopiotahi, Base: n = 894

1. A simple average across visitors (AU, UK, US, DE, CH, JP, IN) based on n = 700 respondents per market with a mix of future and past visitors. The average does not take into account the size and potential of the market in terms of visitors. Reported here to provide an indicative overall view

Q: What types of experiences and facilities would you expect when visiting Milford Sound / Piopiotahi?

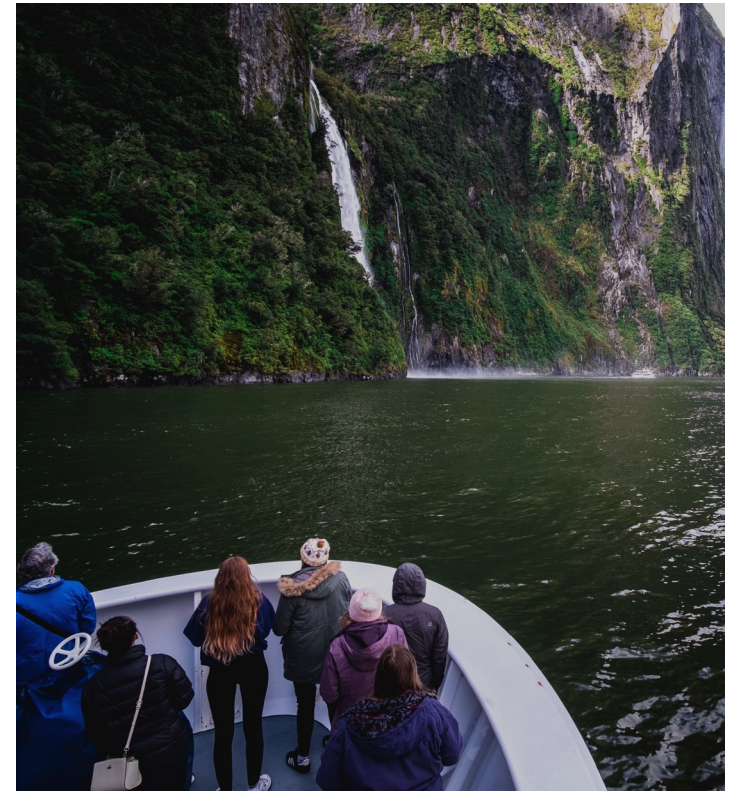
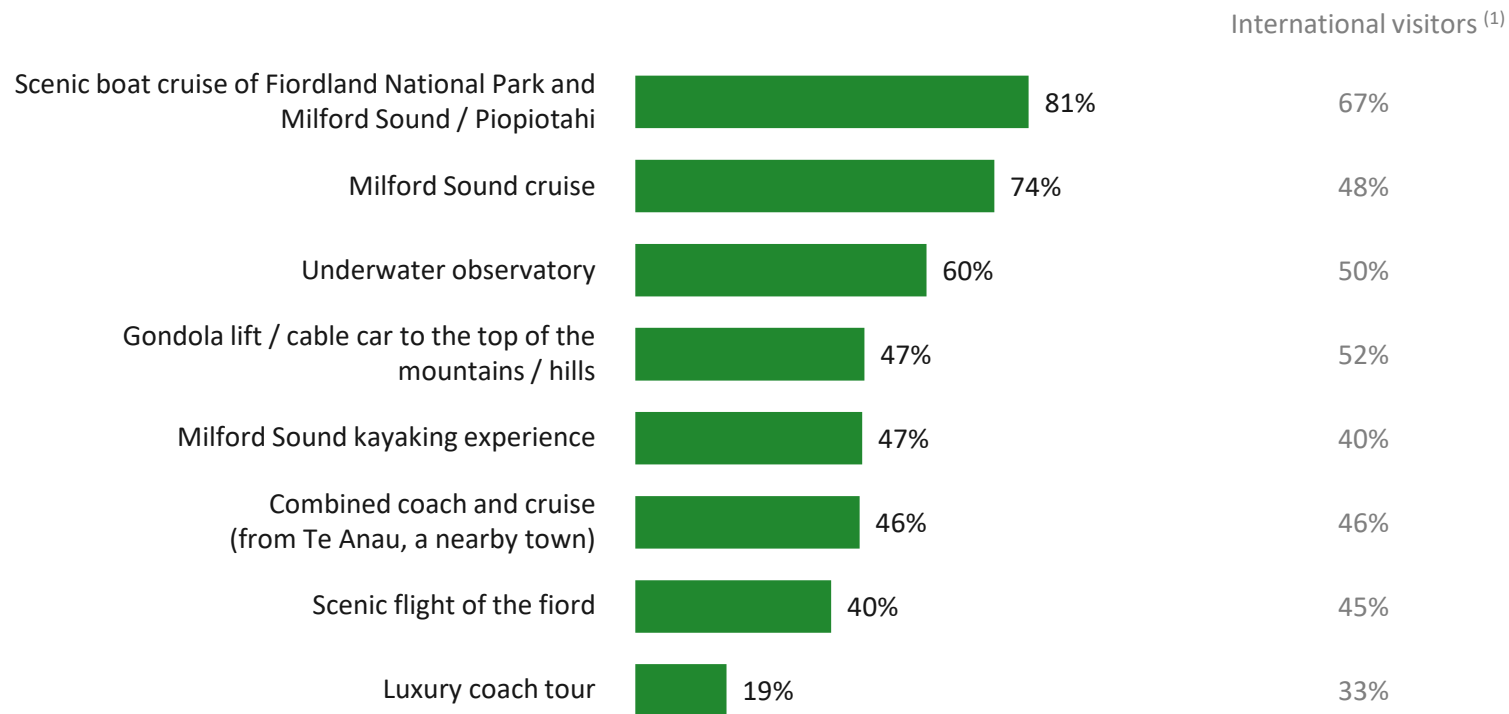
In terms of accommodation options at Milford Sound / Piopiotahi, NZers are looking for overnight stays in a sustainable accommodation over luxury or something too basic like camping – this is consistent with preferences among international visitors

Type of accommodation visitors are interested in



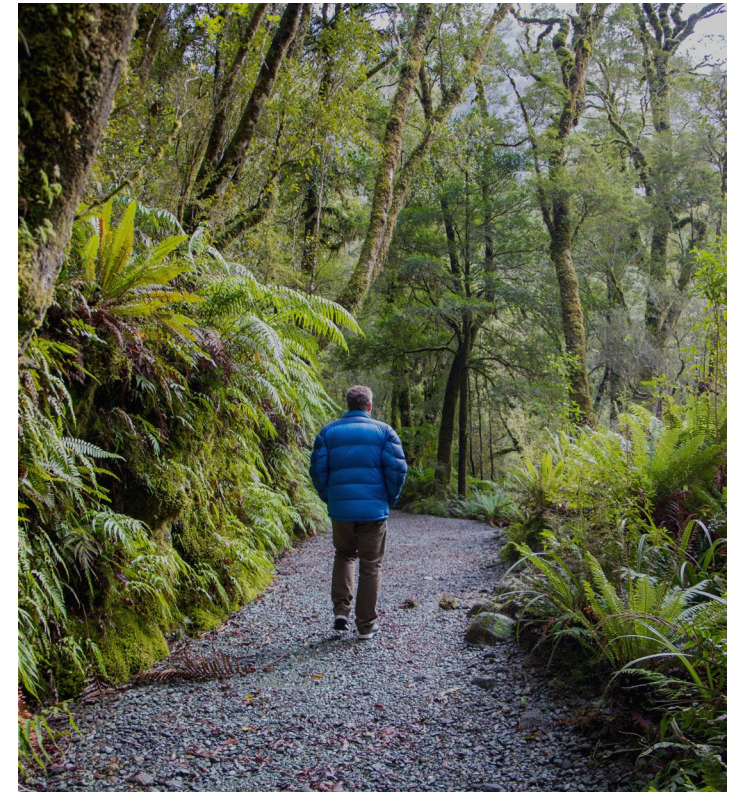
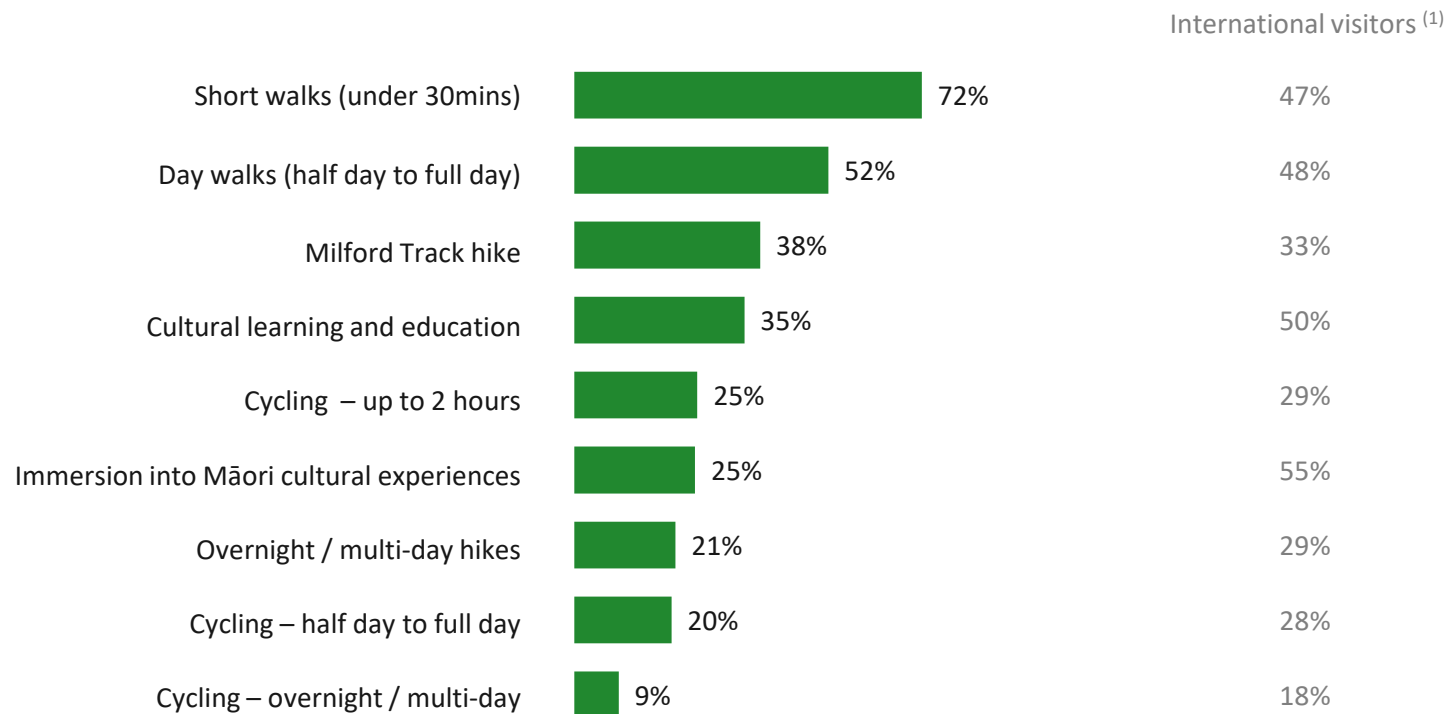
Within the activities NZers would be interested in paying for, scenic boat cruises are in high demand followed by an underwater observatory

Paid activities visitors are interested in



In terms of activities, short and day walks are in high demand followed by the Milford Track hike; there is a good level of interest in immersive Māori culture experiences, although to a lesser degree than compared to international visitors

Activities visitors are interested in



3

Evaluation of the Masterplan



In qualitative research participants were presented with the challenges facing Milford Sound / Piopiotahi before seeing the Masterplan, and asked how they would tackle these challenges

The challenges facing Milford Sound / Piopiotahi

Milford Sound / Piopiotahi hosted a record 870,000 visitors in 2019. The number of visitors has grown 69% over the last 13 years. This is forecasted to reach 1.1 million by 2030. Visitation to Milford Sound (and other Fiordland locations) is higher than to any other tourist attraction in Aotearoa New Zealand.

The challenges faced impact the visitor experience and the wellbeing of local habitats, landscapes and communities that live in the area.

Carbon impact on the environment

The Fiordland and Milford Sound / Piopiotahi area supports a wide range of indigenous species, including threatened and at-risk plant, bird, insect, lizard, bat and marine mammal species. Some of these habitats and species are globally unique.

Increasing visitor numbers, high amounts of traffic congestion (parking overflow and overcrowding) between 11 am – 3 pm, cruise ships block key sight lines, release “smog”. The human impact and on-going pollution threaten the local ecology.

The low connection to local culture

The current experience offers limited acknowledgement of local Māori culture, heritage and historical associations with the land.

There is a desire to build in and revive cultural stories, practices and values of Ngai Tahu (local tribe) into the visitor experience.

Similarly, local tribes and communities want to experience a feeling that enhances their connection, sense of belonging to the place and to their heritage.

Quality of Infrastructure

Most infrastructure is old and in poor condition. It has not changed in response to increasing visitor numbers over the last 7 years, with a lack of investment.

Overcrowding in specific areas means that other key points of interest along Milford Road are often missed – the visitor experience needs to be better organised.

A balance is needed to ensure modernised infrastructure, new visitor experiences that are resilient to change and risk, while aligning to sustainable principles.

Hazards and Visitor Risks

The road leading into Milford Sound / Piopiotahi is challenging for international and local drivers. Due to the remote location of Milford Sound, the number of road accidents (due to driving conditions and driver fatigue), and natural hazards (such as rockfalls / landslides, seasonal avalanches, and periodic flooding).

Most visitors are unaware of these risks and the existing infrastructure does not provide much protection from natural hazards.

If you were in charge, what would you do in response to these challenges and situation?

While some of the challenges facing Milford Sound / Piopiotahi were unsurprising, NZers were surprised by the limited investment being made to protect the area and the lack of presence of culture and history

NZers were not surprised to learn that the infrastructure at Milford Sound / Piopiotahi is aging. There is a **notion that New Zealand only builds for the present**, and that very little future-proofing is considered in development.

NZers were also **unsurprised to learn about the damage to the environment**. With a large number of visitors currently accessing Milford Sound / Piopiotahi, Kiwis expected some level of environmental damage to occur. Typically, NZers assume that international visitors are primarily causing the most damage to the land.

However, NZers were **surprised to hear that there is currently little reinvestment in the environment and region**.

Kiwis assumed that part of the fee to partake in activities at Milford Sound / Piopiotahi would be supporting the preservation and conservation of the environment.

Many NZers were also taken aback by the **lack of cultural connection**, particularly as Fiordland is seen to have a rich history, being the pounamu region. With many destinations now incorporating greater recognition of heritage into the experience, **Kiwis assumed that acknowledgement and education of Māori culture would be prevalent** at Milford Sound / Piopiotahi.

“

“I assumed a portion of the money going to the tour boat operators would be going back to the environment.”

– Previous visitor

“It’s sad to hear that there isn’t a greater connection to the local culture. That really stood out to me.”

– Considering visiting Milford Sound / Piopiotahi, family

“New Zealand only ever builds for the now, so it’s not surprising that the infrastructure is falling apart. 2012 was a long time ago too.”

– Considering visiting Milford Sound / Piopiotahi, family

The solutions proposed by respondents largely aligned with the Masterplan; importantly, NZers proactively suggest limiting visitor numbers but only if NZers have priority access

In response to the challenges facing Milford Sound / Piopiotahi, New Zealanders suggested:

a. Limit visitation

If the issue is people putting a strain on the environment, NZers first and foremost suggest reducing the number of people allowed to visit Milford Sound / Piopiotahi. In this suggestion, Kiwis imagined a booking system could support capping the numbers – however NZers would want to ensure New Zealanders retain priority access to our national treasure.

b. Invest in better infrastructure – not more

NZers suggest investing in upgrading the existing infrastructure, so that it is both environmentally sustainable and safe. While there is a palpable desire for better infrastructure, New Zealanders do not want an increase in infrastructure – as that could spoil the environment and over-commercialise Milford Sound / Piopiotahi.

c. Pay per impact

NZers suggested that a fee could be implemented for those who are partaking in activities that damage the environment – i.e. cruise ships, boat rides, driving their own car in, hikes, and more. This idea was met with positivity for allowing Milford Sound / Piopiotahi to be accessible to all, while generating money to preserve the environment.

d. Sustainable accommodation and green technologies

NZers spontaneously suggested that sustainable technologies be implemented at Milford Sound / Piopiotahi – such as e-kayaks, electric boats and solar power. Sustainable accommodation was also suggested to enable people to spend more time at Milford Sound / Piopiotahi, while having a minimal impact on the environment.

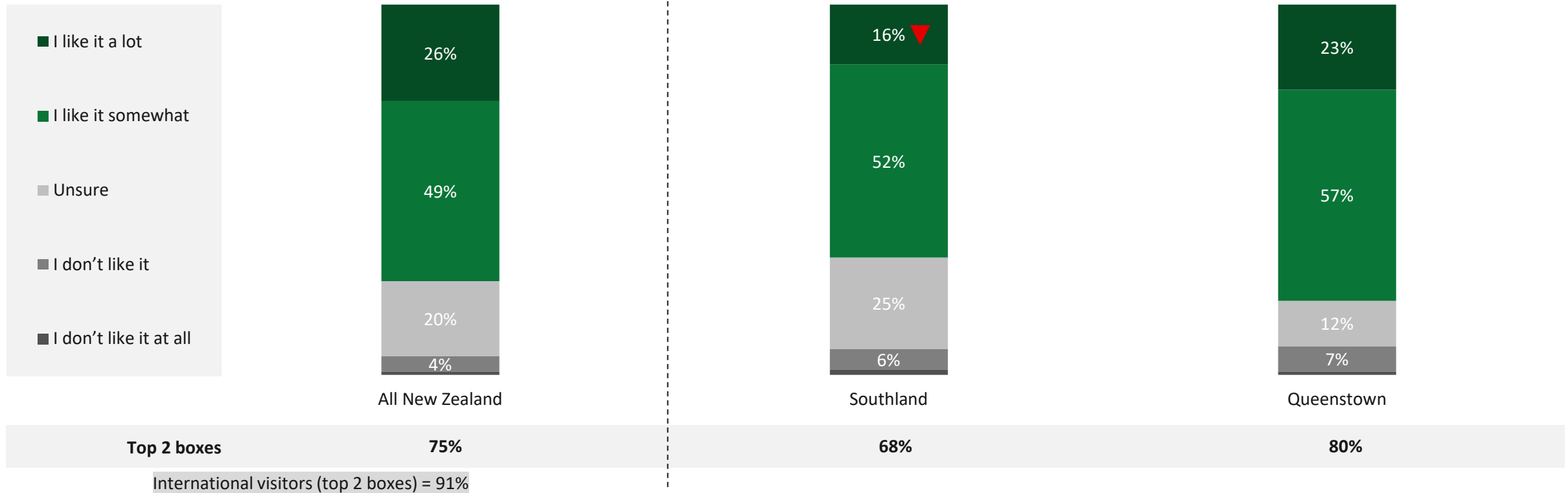
e. Greater consultation with iwi

NZers also suggested that cultural connection could be restored at Milford Sound / Piopiotahi through greater consultation with iwi and mana whenua – to understand how to authentically incorporate Māori culture into visitors experience, acknowledging the owners of the land and encouraging greater cultural education.



In its entirety, the Masterplan is generally positively received: most NZers like the plan, although among Southland residents the response is somewhat subdued yet largely positive

Likability of the Masterplan and its ideas



The Masterplan's intention to protect and preserve the environment while creating world-class visitor experiences resonates well with NZers – the prohibition of cruise ships is particularly significant for many

Liked elements of the Masterplan – verbatim comments

Upgrading facilities

- “Modernising the facilities and making it less congested but while using practices that are good for the environment - hopefully ensuring that this is something that can be enjoyed by future generations too” (Waikato)
- “I like the idea of charging international visitors. Modernising the facilities also a great idea” (Southland)
- “Upgrading facilities, focusing on money spent to preserve conservation areas” (Southland)
- “It is definitely time to think about improving facilities and protecting the fragile environment. The ideas listed are positive and worthy of consideration” (Otago – Queenstown)

Prohibiting cruise ships

- “Prohibiting cruise ships, getting locals involved, reducing congestion, having visitors pay, ensuring Māori are involved” (Southland)
- “Removing cruise ships. Have been there when the air is thick with their smoke. Wonderful idea. Please do it. Have helicoptered there and loved it, but the noise is distracting to those on the ground. Overseas tourists should be charged. NZ taxpayers coverage cost of the mess they leave on roadsides etc” (Otago – Dunedin)
- “NO CRUISE SHIPS. The wake from ships upsets wild life. We are selling NZ short. If people want to go to Milford Sound make it more difficult to enhance it's mystic and add more dollars to our conservation purse” (Otago – Queenstown)

Environmental focus

- “Moving towards prioritising ecological and environmental stuff. More involvement and incorporation of cultural and heritage factors” (Canterbury)
- The incorporation of local and cultural groups, giving back to the conservation of the environment” (Taranaki)
- “Cutting down on congestion and carbon emissions which helps the environment and encourages people to look at other alternatives” (Southland)
- “I like the focus on sustainability and reduction of harm to the environment and flora and fauna” (Otago – Dunedin)
- “Environmentally sensitive it's a beautiful place and some effort to keep it that way is great” (Otago – Queenstown)

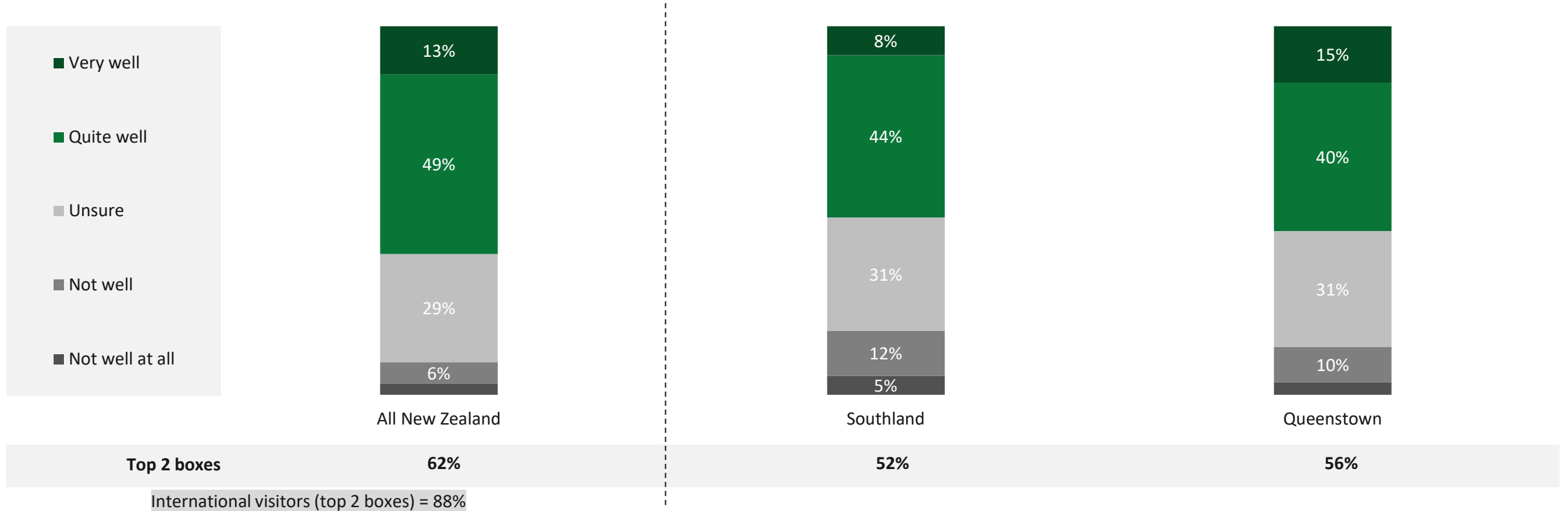
Charging Internationals

- “Focus on environment, creating a visitor hub at Te Anau (and tours starting from there), charging a small fee which will directly go towards Piopiotahi, reducing traffic / congestion including keeping cruise ships out of the sound, improving facilities at Milford (the cafe is a disgrace), incorporate more info about local Māori culture as well as environment, increase the attractions at and around /on the way to Milford Sound to make the trip not only about the Sound, but the whole area” (Auckland)
- “Charging tourists a fee that goes towards conservation. Use technology and processes that are good for environment” (Southland)



The Masterplan's vision for "Piopiotahi – New Zealand as it was, forever" is not universally understood by NZers, and its communication and intent may require further refinement

Clarity of the Masterplan in communicating its vision statement "Piopiotahi – New Zealand as it was, forever"



“Piopiotahi – New Zealand as it was, forever” was polarising, with some NZers assuming it was an empty promise, and others perceiving it to be positively motivating

Some New Zealanders felt that “Piopiotahi – New Zealand as it was, forever” was resting too strongly on New Zealand’s perception of being clean and green – when in reality they do not see this to be necessarily true.

People who had a less favourable reaction, were saddened that New Zealand’s environment has already been damaged – and they felt this vision wasn’t going to strongly change the course of action.

“It’s disappointing that we’ve already ruined Milford Sound / Piopiotahi.”
– Considering visiting Milford Sound / Piopiotahi, family

“It’s never going to be as it was forever.”
– Previous visitor

Whereas other New Zealanders found “Piopiotahi – New Zealand as it was, forever” to be a motivating vision for preserving the environment, and sustainably imagining the future of Milford Sound / Piopiotahi.

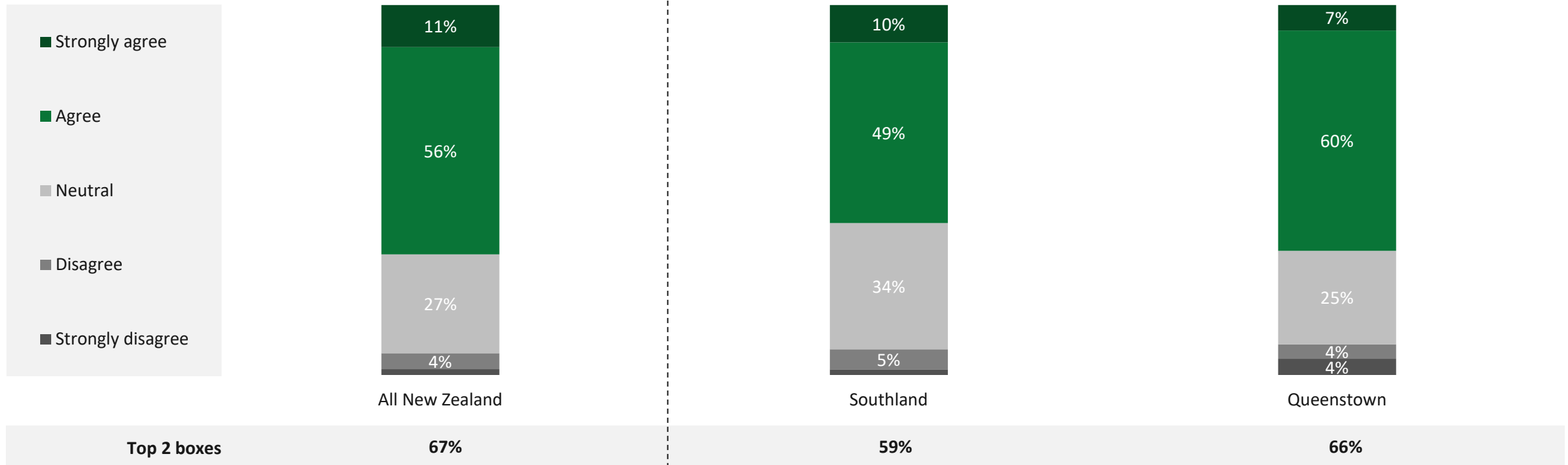
Those who felt positively towards the Masterplan vision assumed that this means that there will be no new development, that the environment will come first, and human impact will be reduced.

“I like this statement. It is drawing a line in the sand to say no more newness.”
– Considering visiting Milford Sound / Piopiotahi, family

“I see this statement to be inviting, a promise to reduce impact, preserve the land and ensure Milford Sound / Piopiotahi is well taken care of.”
– Previous visitor

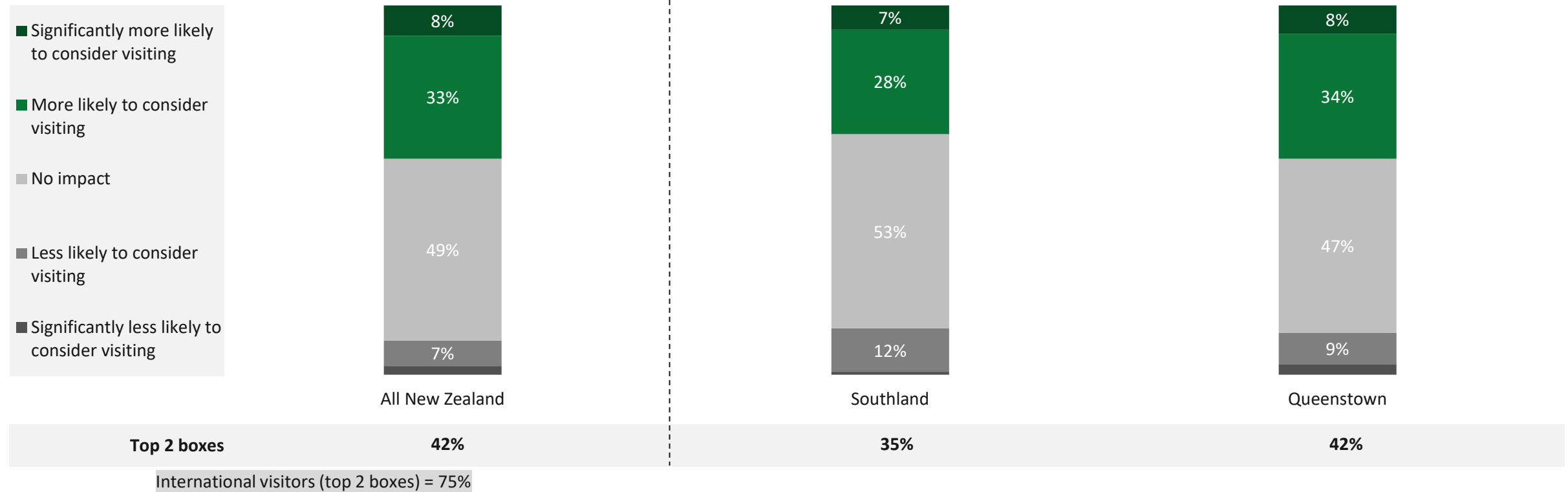
The majority of NZers agree that the Masterplan is giving future visitors a chance to participate in preserving Milford Sound / Piopiotahi

Agreement that the Masterplan gives visitors an opportunity to contribute to the preservation of Milford Sound / Piopiotahi



For most NZers, the proposed changes within the Masterplan would either have a positive impact or no impact on their decision to visit Milford Sound / Piopiotahi, however there is a small group of NZers who believe they would be less likely to visit the area

Impact on the Masterplan on consideration to visit the Milford Sound / Piopiotahi



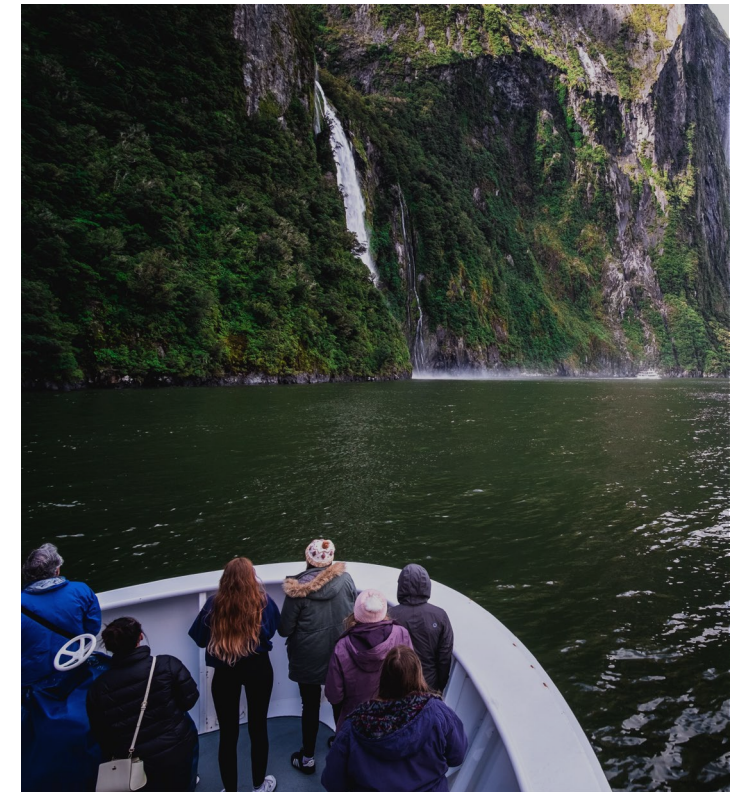
The main concern NZers have is that the plan does not go far enough in reducing the number of visitors, and therefore, it may not have a meaningful impact on restoring the environment

Concerns NZers have with the Masterplan



While for international visitors the concern is more around how it impacts **their** experiences, for NZers concerns are more focused on the impact on our land and nature

International visitors ⁽¹⁾



Imbued in NZers' response to the Masterplan is a sense of distrust and concern that it will not be done well

New Zealanders have experienced beautiful, natural destinations become spoiled through over-commercialisation in the past – with many Kiwis readily armed with examples of destinations that have been “destroyed.”

There is a concern that Milford Sound / Piopiotahi has the potential to become spoiled, over-developed, and over-commercialised as well.

NZers will therefore, be particularly critical towards how the Masterplan is implemented, as they want to ensure Milford Sound / Piopiotahi is preserved well for future generations to come – without damaging the environment, locals, local businesses, or iwi.

Proactive and transparent communication from the Milford Opportunities Group, will be needed to ensure New Zealanders feel aligned to any changes to Milford Sound / Piopiotahi.



New Zealanders stressed the need for the Masterplan to have continual investment, consultation, and reconsideration, to ensure the longevity and sustainability of the proposed changes

New Zealanders are sensitive to infrastructure lifetimes and want reassurance that the Masterplan is future-focused, and will not become outdated in the near term. There is a perception that New Zealand typically “builds for the now” and doesn’t consider the longevity of a place.

Future-proofing is felt to come from continuous investment, and consultation with locals, iwi, and local businesses. Kiwis want to see Milford Sound / Piopiotahi flex with the times and stay up to date with the latest sustainable technologies, and better infrastructure.

The international fee is seen to support continual investment, however, it is critical that consultation of the masterplan is upheld to ensure it does not lose relevance with visitors and stakeholders alike.

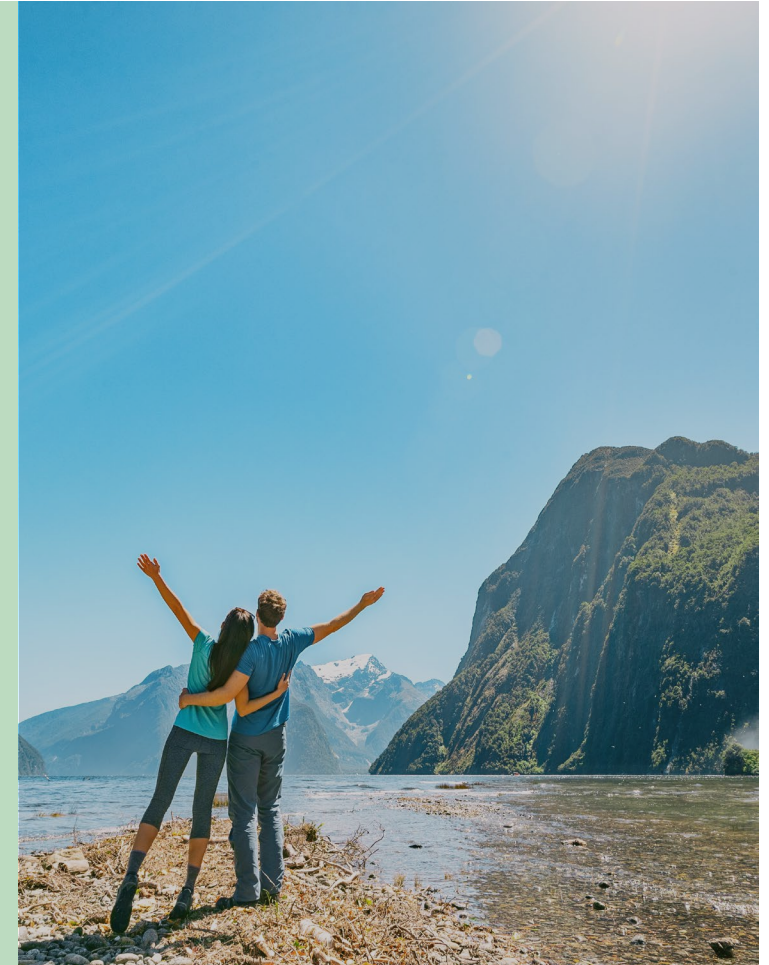
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“This shouldn’t be a one-off plan or idea, it needs continual investment, nurturing, and re-evaluation to ensure infrastructure doesn’t become obsolete thereafter.”

– Considering visiting Milford Sound / Piopiotahi, no kids

“New Zealand typically only builds for the needs of the moment – or the now. I want to know that this is going to be future-proofed, and isn’t going to look dated in a few years time.”

– Considering visiting Milford Sound / Piopiotahi, family



The commercialisation of Milford Sound / Piopiotahi is a strong concern amongst NZers – any changes therefore must feel discreet, with minimal impact on visitors' experience

NZers do not want the Milford Sound / Piopiotahi experience to change significantly – instead, they are open to ideas that support better infrastructure (not necessarily more) and greater preservation of the environment.

In implementing the Masterplan, there is a fine line to tow to ensure that changes to Milford Sound / Piopiotahi do not feel commercialised, or for the purpose of generating more profit. Controls, such as managed access, should be carefully considered so that NZers do not feel that their land is restricted to them, or that the experience is primarily designed for international tourists.

To reduce the impact on the experience, and prevent international visitors from being deterred from Milford Sound / Piopiotahi, it was also suggested that the international fee could be embedded into other activities, such as the bus ticket, or boat pass.

“

*“Too much control would be like visiting a zoo”
– Considering visiting Milford Sound / Piopiotahi, family*

*“Protect it, don't commercialise it.”
– Considering visiting Milford Sound / Piopiotahi, no kids*



Most importantly, there is a strong need to balance development with the environment – ensuring that the environment remains the primary focus at Milford Sound / Piopiotahi

In conclusion, the primary concern from the Domestic Audience is the potential negative impact and damage to the environment. The untouched, natural beauty is the primary reason Kiwis and International Tourists visit Milford Sound / Piopiotahi, so it is critical that the environment remains the key focus in any developments to the area.



“

“It is important to balance development with the environment. And the environment should be #1 priority.”

– Considering visiting Milford Sound / Piopiotahi, family

“Build around the ecology.”

– Considering visiting Milford Sound / Piopiotahi, family

“Invest in how we reduce impact.

How do we be truly accommodating to the environment?”

– Considering visiting Milford Sound / Piopiotahi, family

“Go back to the objective – how do they manage Milford Sound in the long term? Sustainability and cultural ideas are aligned, but not sure about everything else.”

– Previous visitor

“Environment over economy – without damaging local, iwi businesses that already exist.”

– Previous visitor

“Investing doesn’t need to mean more infrastructure.”

– Southlander

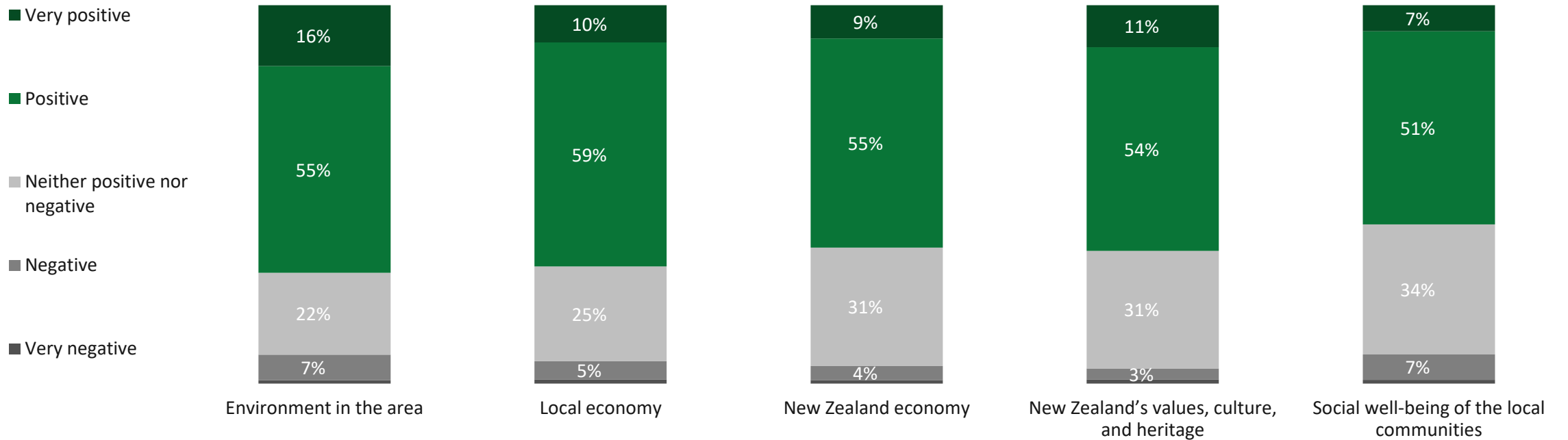
4

Impact of the
Masterplan on
enrichment of New
Zealand across four
capitals



The Masterplan is perceived to have a significant positive impact across all four capitals, particularly on the natural environment in the area and the local economy

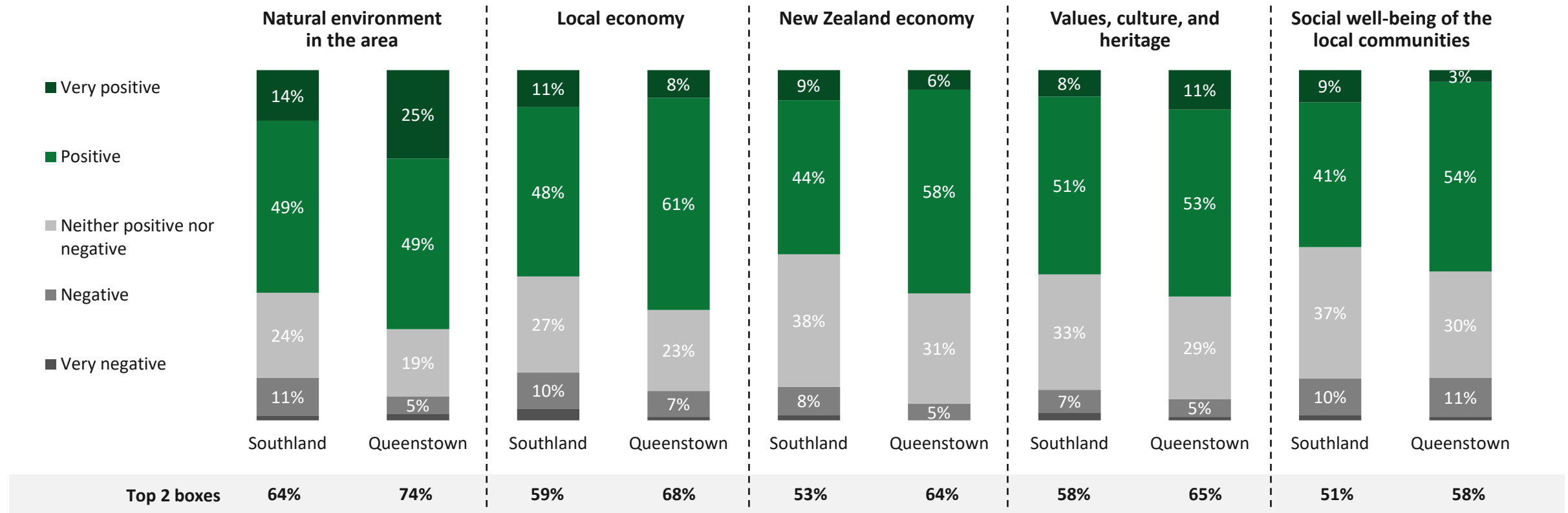
Perceived impacts of the Masterplan across four capitals: Environment, Economy, Culture and Community



Top 2 boxes	71%	69%	64%	65%	58%
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Indicatively, Southland residents tend to be somewhat more negative in their perceived impact of the Masterplan on enriching Aotearoa across the four capitals

Perceived impacts of the Masterplan across four capitals: Environment, Economy, Culture and Community



Southlanders are sceptical that the cost to implement the Masterplan will inevitably fall on them, so clear communication of how the fee is leveraged will be needed to mitigate resent

Southlanders view the Masterplan with an eye of concern that the cost will inevitably fall on them – either directly or indirectly.

Southlanders expressed frustration that their rates could increase, or that it will result in greater development in Te Anau, which would be funded through their own taxes, and put pressure on their infrastructure.

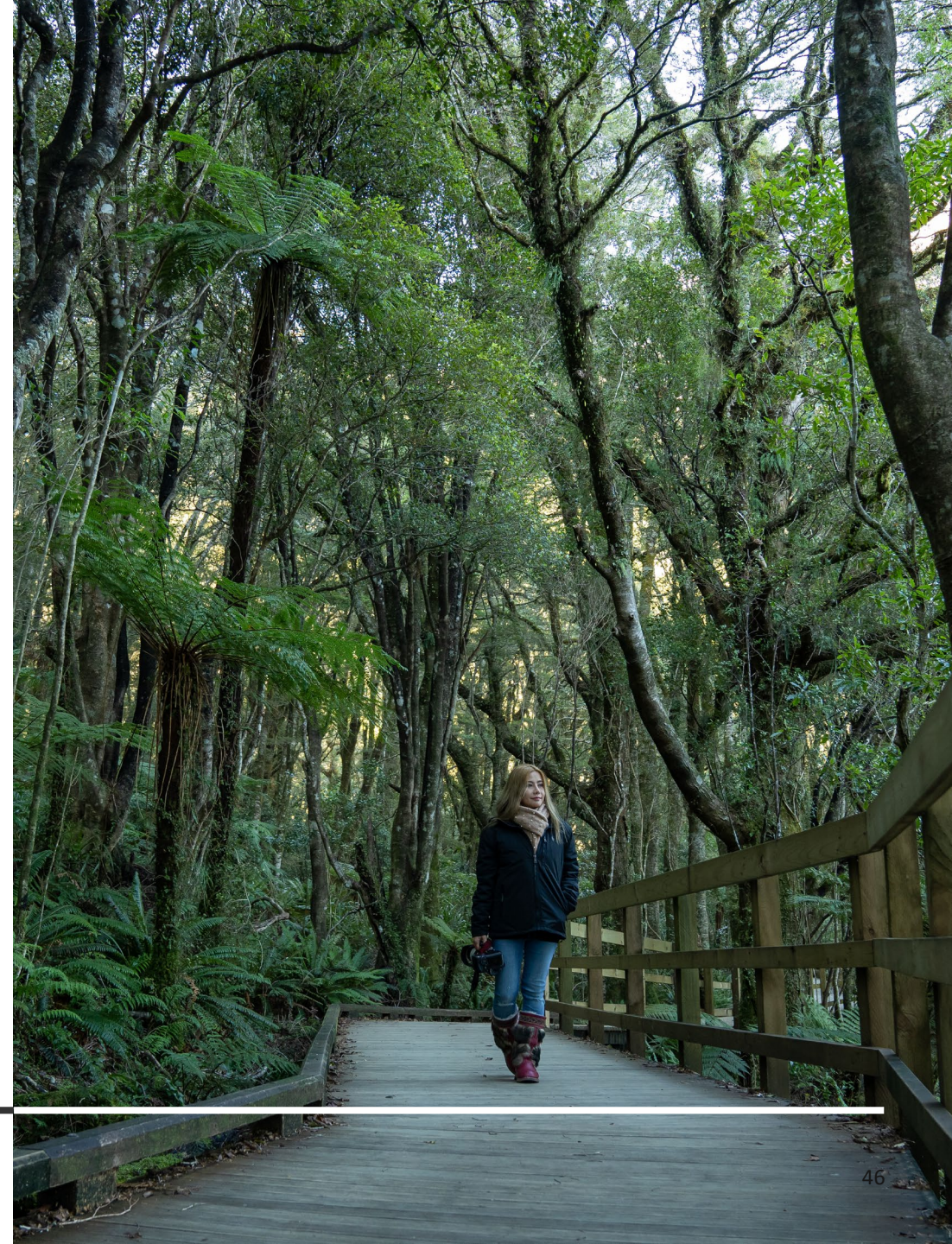
It will be important to mitigate these misconceptions through transparent communication of what money generated from the fee covers, to reduce the potential for anger from locals.

“

“Everything comes with a cost.” – Southlander

“Our rates will go up, I just know it.” – Southlander



“The government will fork out money for this, which will reduce the ability to spend on other things.” – Southlander



The majority of NZers agree that the Masterplan will stimulate economic growth and create employment opportunities in the area, however, some also believe that it could lead to an increase in the cost of living for locals in Te Anau and pose challenges for local tourism operators

Perceived impact of the plan on Milford Sound / Piopiotahi area, and New Zealand broadly
(% Strongly agree + agree with the statement after being taken through to the Masterplan and its ideas)

		All New Zealand	Southland	Queenstown
Benefits	Will create economic growth and employment opportunities in the area	68%	55%	70%
	Will enhance New Zealand's reputation as a destination that cares for its land, people and culture	68%	61%	69%
	Delivering this plan will strengthen Milford Sound / Piopiotahi as an icon of NZ	67%	59%	65%
	Will encourage more investment into the area	65%	52%	64%
	Implementation of the masterplan will significantly improve the area	63%	63%	68%
	Will encourage New Zealanders to look after our natural environment	60%	54%	59%
	Will encourage local businesses to adopt environmentally sustainable practices	59%	52%	67%
	The masterplan addresses current issues in the area	58%	57%	67%
	Will enhance social well-being of the communities in the area	57%	45%	55%
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Downsides	Will decrease the risk of serious road accidents	45%	50%	51%
	Nearby towns like Te Anau will become too expensive to live for locals	36%	37%	29%
	Infrastructure development in the area will not keep up with demand	33%	28%	33%
	Will make it more difficult for New Zealanders to access Milford Sound / Piopiotahi	33%	40%	25%
	Implementation and development will take too long and negatively impact visitor experience	32%	35%	26%
	Will make it more difficult for tourism businesses to operate in the area	29%	37%	27%

  Significantly higher / lower than Rest of New Zealand

The Masterplan must also limit negative impact to locals, iwi, and tourism operators

New Zealanders want to ensure that the Masterplan does not negatively impact Southland and Te Anau locals, iwi, and tourism operators. It will be critical to ensure there is minimal burden on these key stakeholders – or, there is a potential that New Zealanders will view the Masterplan with frustration and dislike.

There is strong concern regarding how the Masterplan could change and spoil the small-town feel of Te Anau, and require fundamental upgrades to the infrastructure.

Kiwis also express worry that the Masterplan could deter international visitors, and take away business from the local tourism operators. This concern is particularly heightened due to the cost of living crisis, and general economic uncertainty.

NZers also want to ensure iwi have the final say regarding how their land is changed, and how their culture is represented at Milford Sound / Piopiotahi.

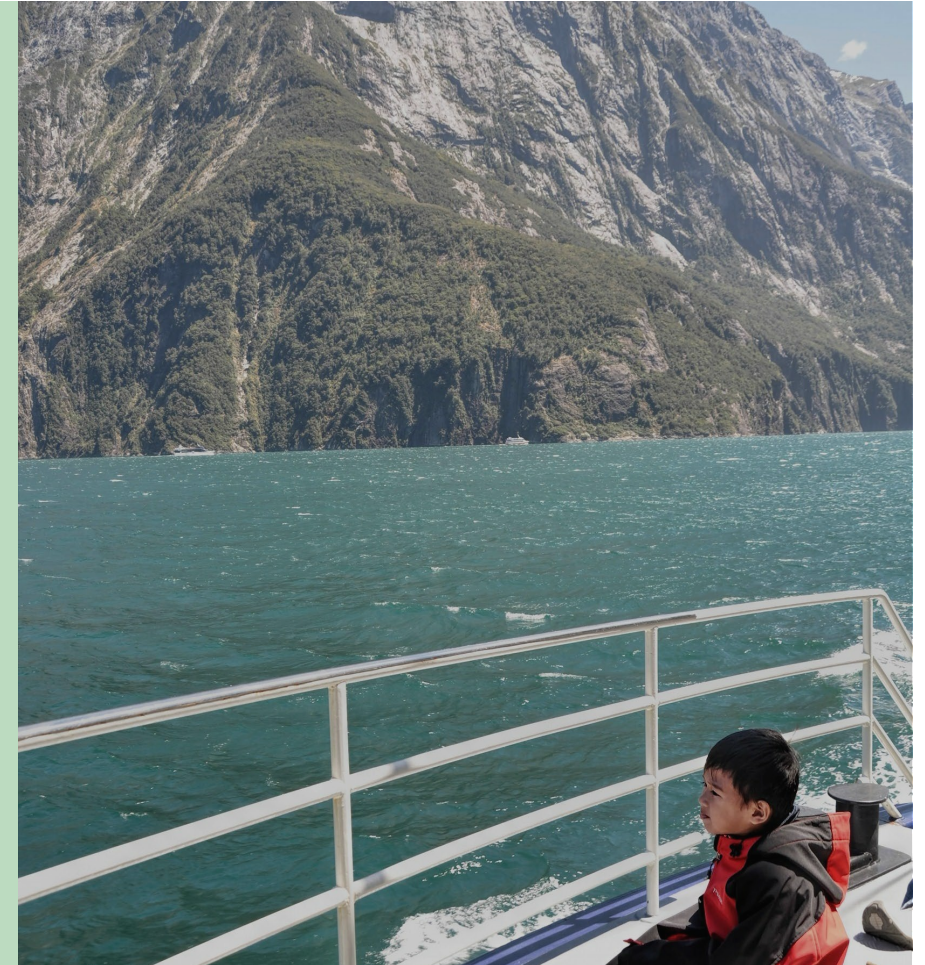
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“Make sure the locals and iwi have the last word”

*– Considering visiting Milford Sound
/ Piopiotahi, family*

“Respect the culture that comes with the space.”

*– Considering visiting Milford Sound
/ Piopiotahi, no kids*

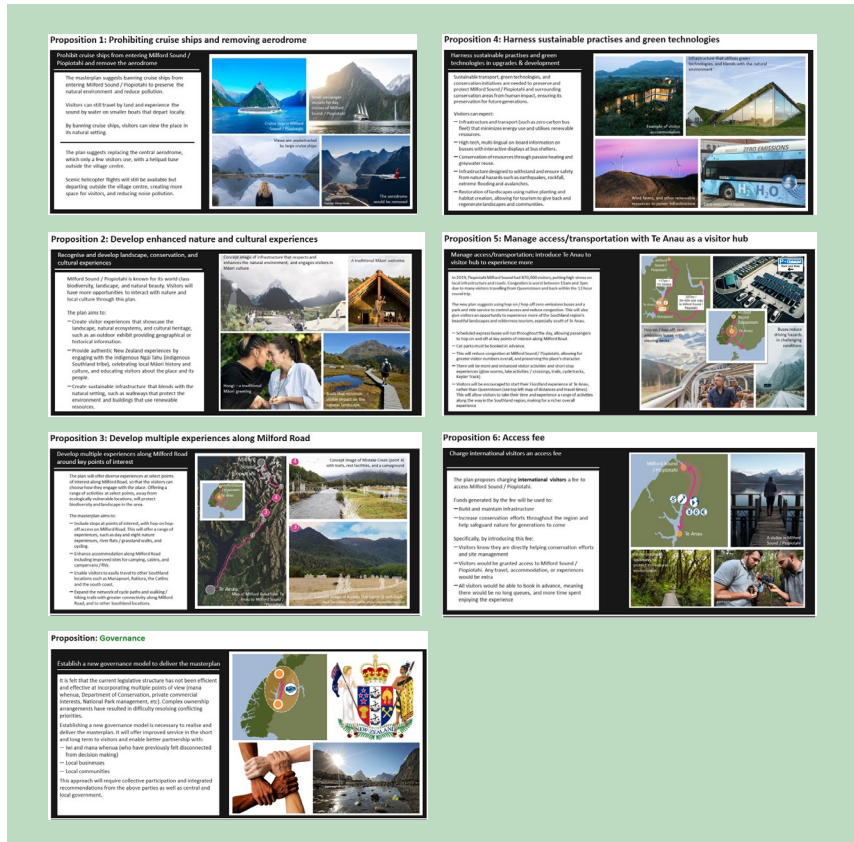


5

Evaluation of the
propositions within
the Masterplan



Respondents were presented with 7 propositions and asked to provide feedback and evaluate them across the range of criteria



Each Masterplan's proposition was evaluated on the following criteria (both quantitatively and qualitatively):

- Likeability
- Clarity in communicating its objective
- Impact on experience when visiting Milford Sound / Piopiotahi
- Impact on consideration to visit Milford Sound / Piopiotahi
- Qualitative feedback on likes / dislikes, tension points, areas for further development

In quantitative research, respondents were presented with the description of 3 out of 7 propositions and asked to evaluate them across the range of criteria. In qualitative groups, participants were introduced to all 7 concepts

All Masterplan ideas are well-received – sustainable practices and green technologies, and multiple experiences along Milford Road were the propositions that resonated the most with NZers

Likeability of the propositions (% like a lot + like somewhat)

	All New Zealand	Southland	Queenstown	International visitors ⁽¹⁾
Harness sustainable practices and green technologies	81%	Small sample	Small sample	88%
Develop multiple experiences along Milford Road	79%	Small sample	Small sample	87%
Manage access/transportation with Te Anau as a visitor hub	72%	Small sample	Small sample	87%
International visitors access fee	70%	75%	82%	79%
Develop enhanced nature and cultural experiences	66%	Small sample	Small sample	89%
Prohibiting cruise ships and removing the aerodrome	61%	57%	75%	86%
Establish a new governance model to deliver the masterplan	51%	Small sample	Small sample	NA



Proposition: International visitors access fee

Charge international visitors an access fee

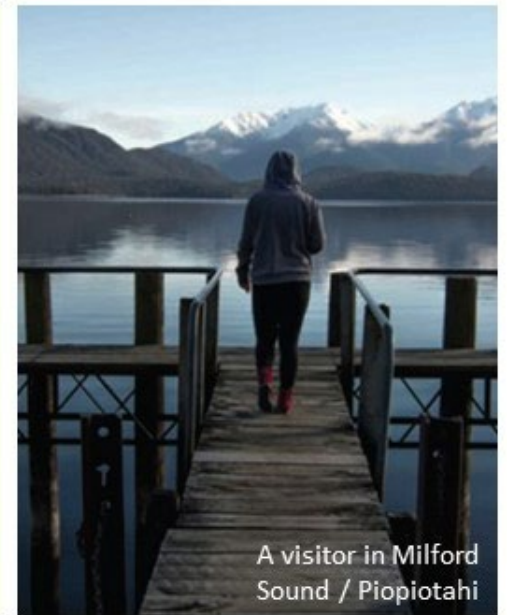
The plan proposes charging **international visitors** a fee to access Milford Sound / Piopiotahi. New Zealand citizens and permanent residents will continue to access the area for free.

Funds generated by the international fee will be used to:

- Build and maintain infrastructure
- Increase conservation efforts throughout the region and help safeguard nature for generations to come

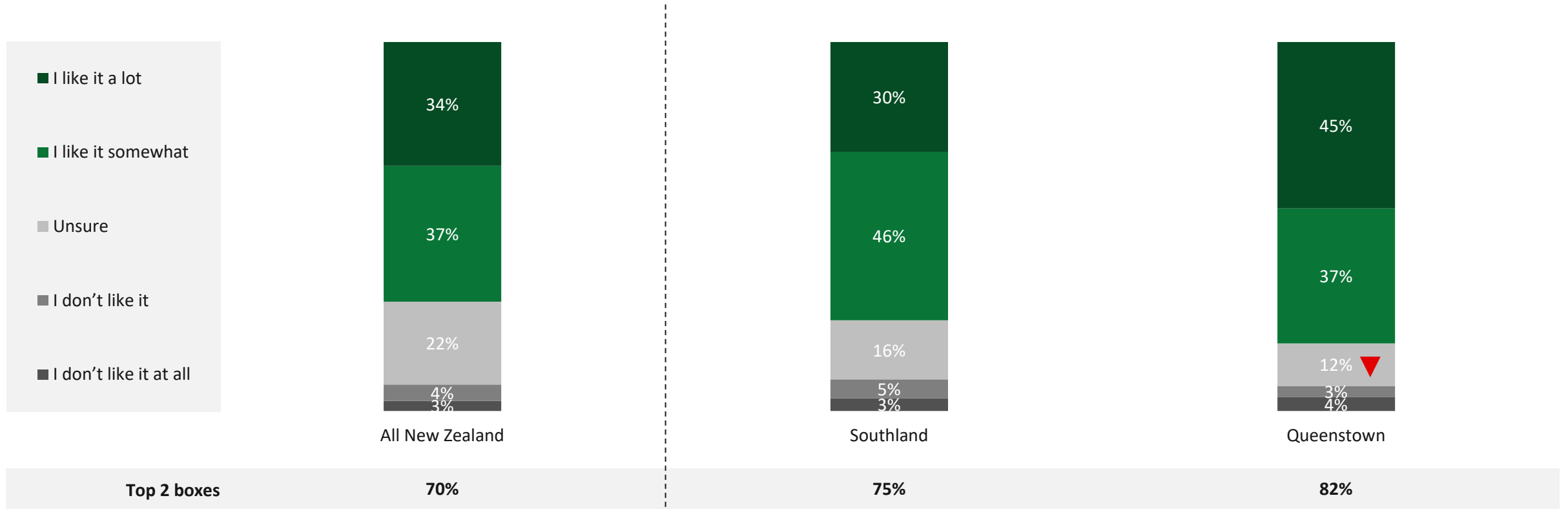
Specifically, by introducing this international fee:

- International visitors are directly helping conservation efforts and site management
- Visitors would be granted access to Milford Sound / Piopiotahi. Visitors would then choose and pay for their preferred travel, accommodation, and experiences
- Both international and domestic visitors would be able to book in advance, meaning there would be no long queues, and more time spent enjoying the experience



When the access fee proposition and how the funds will be used are explained, the majority of NZers are in favour of international visitor fees – and residents of Queenstown in particular

Likability of the proposition: International visitors access fee



Most Kiwis see the international fee as long-overdue, particularly with Milford Sound / Piopiotahi recognised as an UNESCO World Heritage site

Charging a fee is viewed as “uncharacteristic for New Zealand,” in the sense that New Zealand has historically been very humble about our destinations. However, there is a perception that charging a fee to international tourists is a positive idea – particularly as tourists would need to pay for other high-profile destinations around the world.

Being recognised as a UNESCO World Heritage site further reinforces that Milford Sound / Piopiotahi should charge international visitors, as other UNESCO sites around the world do the same.

Domestic tourists also believe that charging a fee could filter out harmful tourists to New Zealand (i.e. those with little genuine care for our environment and culture) and it would force people to have greater consideration for our country.

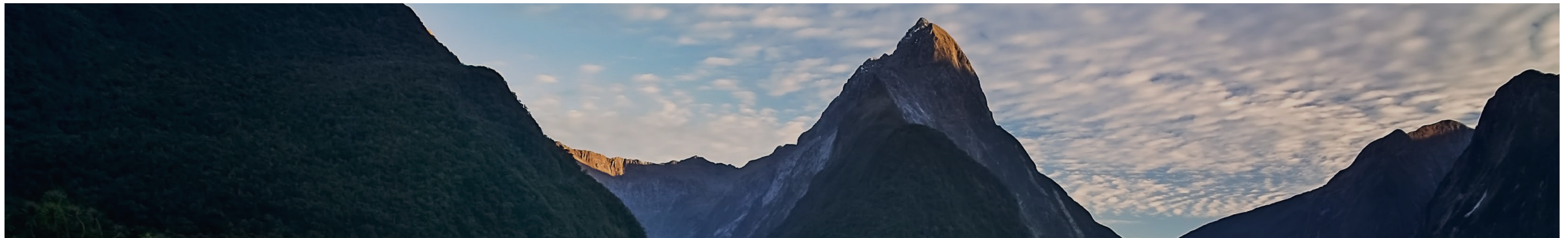
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“New Zealand misses a trick by not charging people for our attractions.”

– Considering visiting Milford Sound / Piopiotahi, family

“Milford Sound is unique. It’s a premium site in New Zealand – and it’s the same as if you were to walk into Machu Picchu... You’d need to pay a fee.”

– Previous visitor



NZers appreciate that only international visitors would be charged, and support the idea of the funds raised being reinvested in preserving the area



What is liked about the proposition: **International visitors access fee** – verbatim comments

Charging Internationals a fee

- “Quite common to charge international visitors at attractions overseas so it’s not an unusual thing to do, and would be great to have money to reinvest in the area” (Otago – Queenstown)
- “New Zealand tax payers have contributed so much for international visitors to enjoy. It is time they contributed directly into the environment” (Waikato)
- “Good that New Zealand tax payers who may never go here are not forced to contribute with little benefit” (Waikato)

The money goes to conservation

- “This happens all over the world and people expect it! I think it’s good for the upkeep and conservation of the national park” (Auckland)
- “The means of increasing revenue to sustain and support the area and its conservation” (Otago – Queenstown)
- “Ability to restrict numbers as well as subsidise conservation” (Otago – Queenstown)
- “I like the idea that this scheme would generate income to help in the conservation of the area” (Southland)
- “It is great for visitors to contribute to the longevity and conservation of the area” (Bay of Plenty)

Online booking

- “International visitors helping with the conservation, booking system and that as locals we can access with out being charged” (Central Otago District)
- “I like charging international visitors a fee, it should be free for New Zealanders. I like a booking system to prevent overcrowding” (Tasman)
- “Booking in advance to help stop congestion” (Auckland)
- “One stop shop for payment. Booking in advance” (Wellington)

Focus on the area

- “The use of a fee to maintain the area instead of relying on other funding streams” (Waikato)
- “International visitors won't be passive visitors, they'll be contributing to maintaining the area” (Auckland)
- “Charging international visitors so they contribute to the future infrastructure and on going costs of preserving this area and the plan to reduce visitor congestion” (Manawatu-Whanganui)
- “I like that NZers can continue to visit for free - I would expect the same overseas. I like the emphasis for visitors that the payment is a contribution to the area” (Bay of Plenty)

Importantly, it is expected that funds generated from the fee are used for better infrastructure, not more

Money from the fee is expected to go towards the preservation and conservation of Milford Sound / Piopiotahi and its natural beauty. People do not expect the fee to go towards other New Zealand needs.

A focus on natural beauty means a fine balance must be struck between better and more infrastructure. Typically, when people describe a focus on natural beauty, they refer to a focus on better, more sustainable and functional infrastructure, vs. the creation of new builds.

This expectation was echoed with international visitors, who were looking for more comfortable infrastructure, while ensuring the environment remains pristine and untouched.

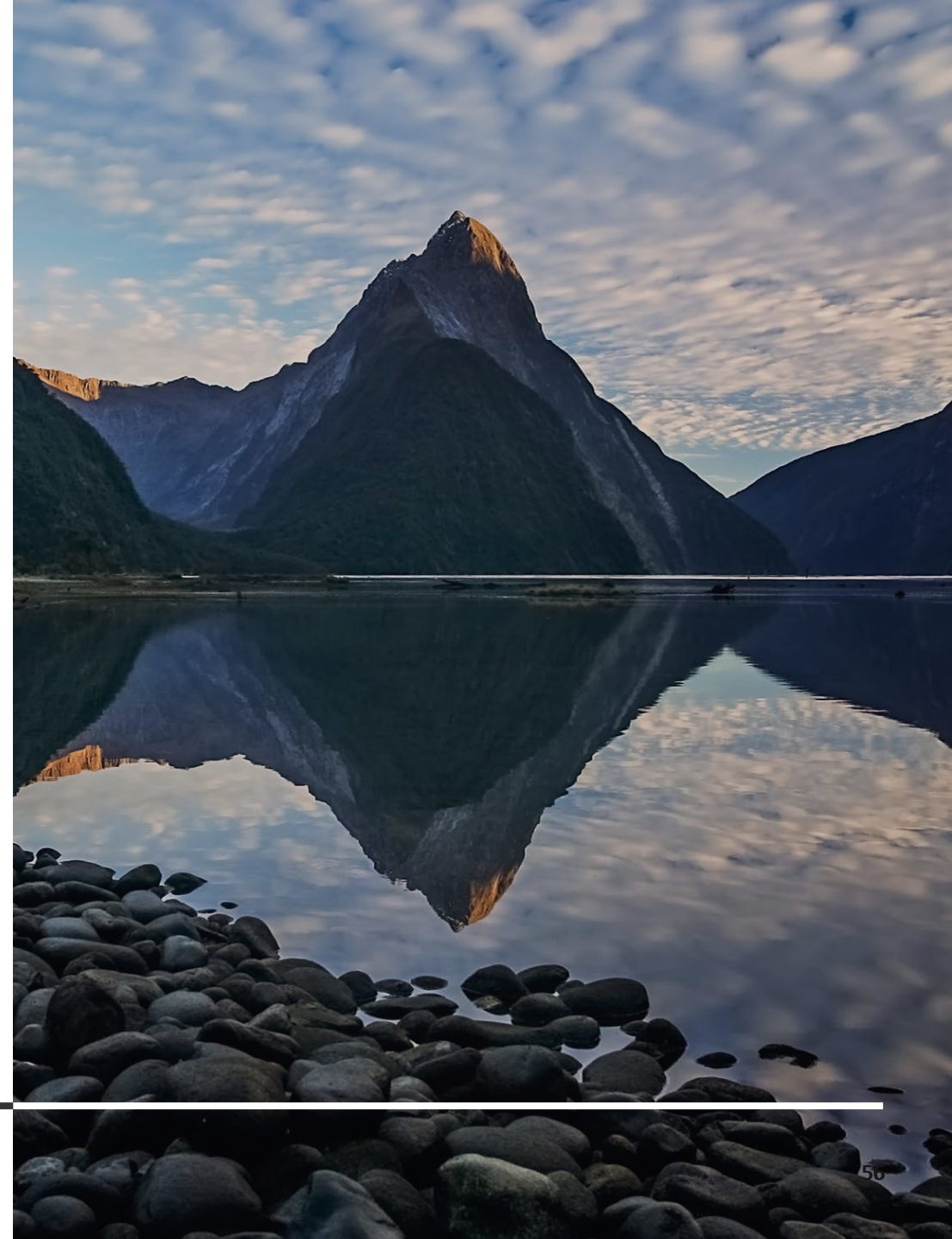
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“They need to ensure they balance development with the environment, and the environment should be the first priority.”

– Considering visiting Milford Sound / Piopiotahi, family

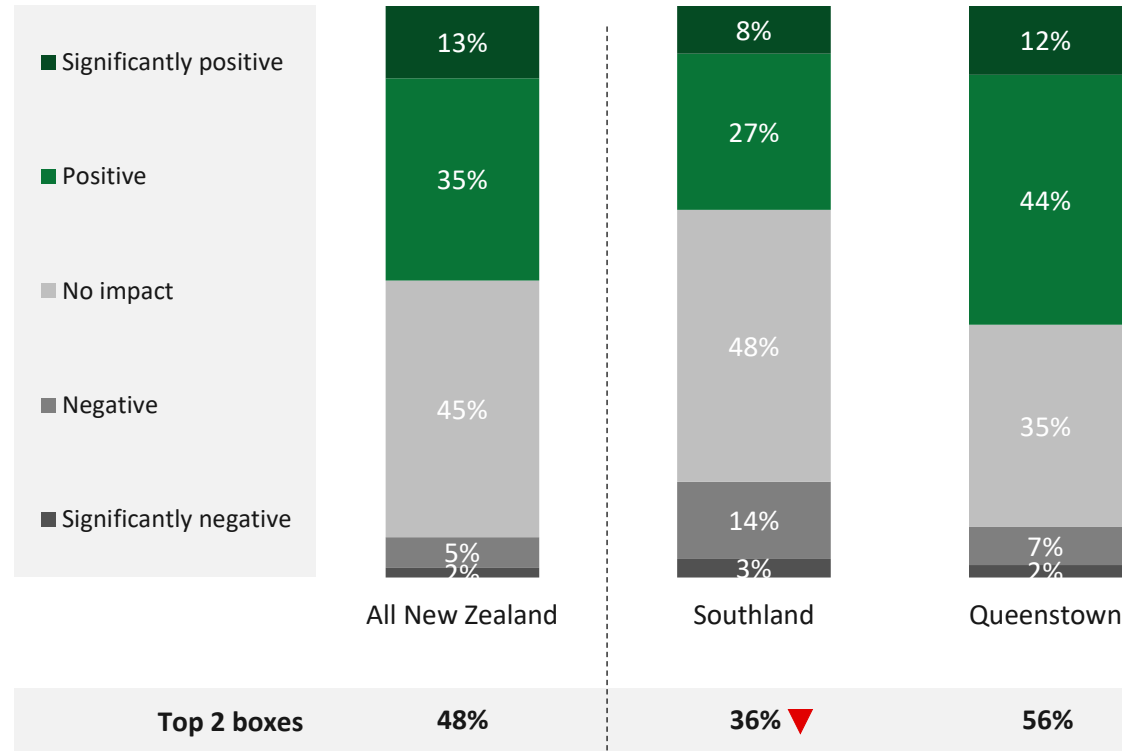
“I don’t want to see the fee change the experience, it should just support better infrastructure.” – Previous visitor

“It will be important to ensure there is education around what the fee goes towards – hopefully the conservation and preservation of the environment predominantly” – Previous visitor

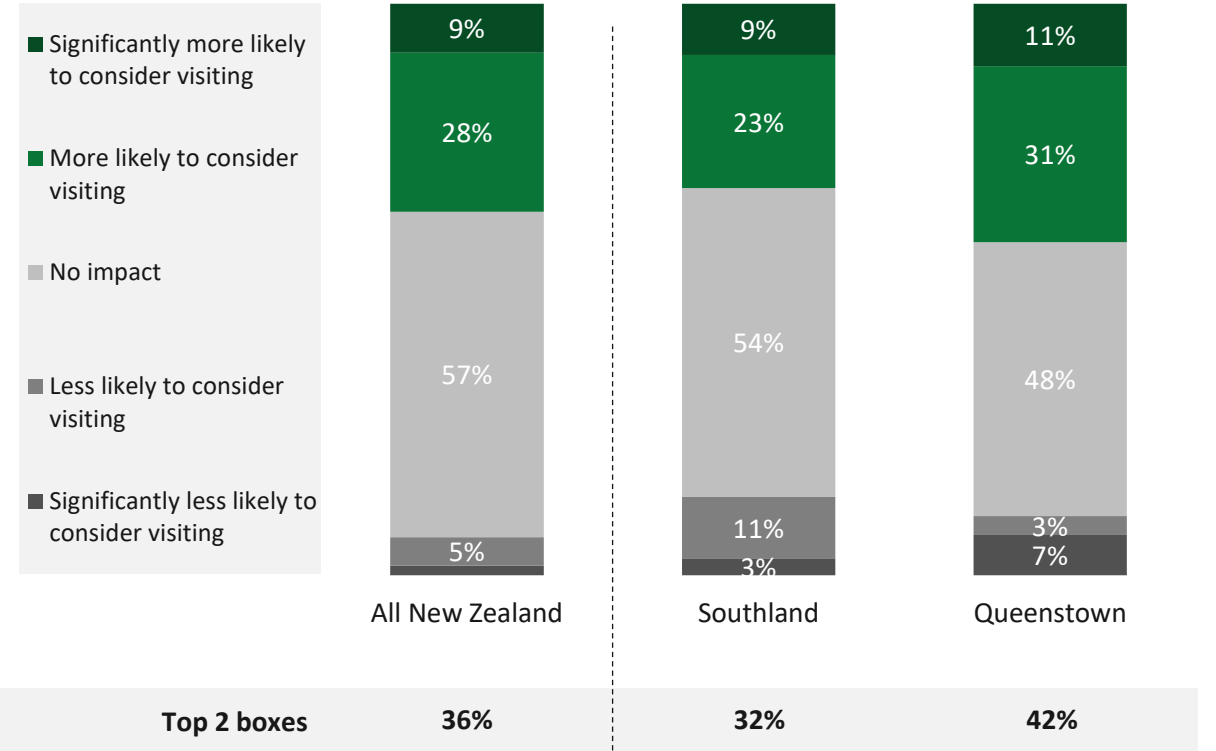


NZers believe that international visitor fees would either have a positive impact or no impact on their decision to visit Milford Sound / Piopiotahi and their experience there – however, responses are more subdued among Southlanders

Impact the proposition might have on visitor experience at Milford Sound / Piopiotahi: **International visitors access fee**



Impact the proposition might have on consideration to visit Milford Sound / Piopiotahi: **International visitors access fee**



There was some concern that the international fee could deter international visitors, in turn, negatively impacting the local operators

Some NZers fear that an access fee to enter Milford Sound / Piopiotahi could deter international visitors, thus, impacting local tourism operators and the local economy.

This feeling may be heightened due to the cost of living crisis New Zealand is currently in.

To alleviate these concerns, the potential benefits of the fee should be highlighted, such as a greater visitor experience, which could generate positive outcomes on tourism operators.

“

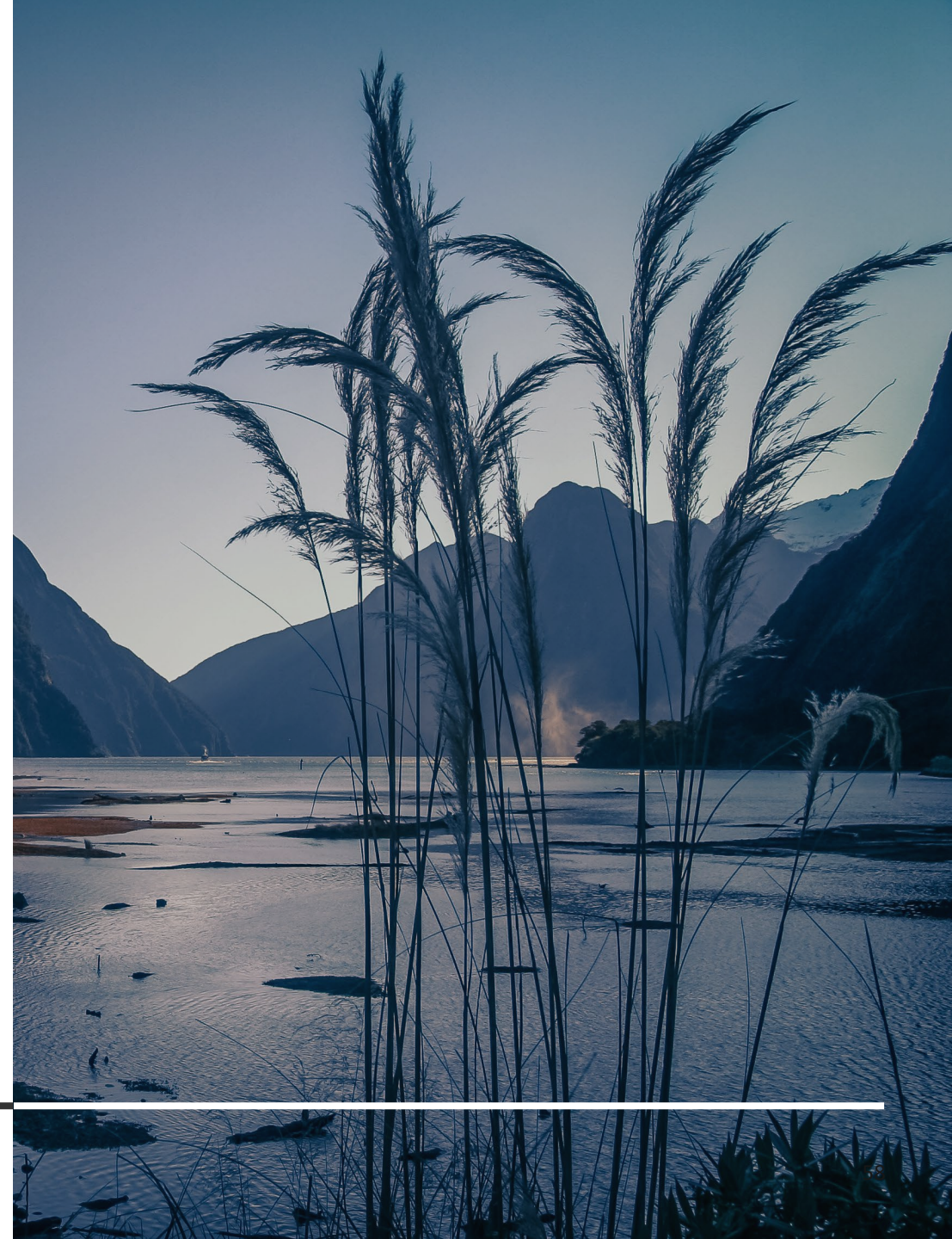
“I wouldn't want to see the fee price people out.”

– Considering visiting Milford Sound / Piopiotahi, no kids

“What about the local businesses? What if tourists stop visiting because of the fee?”

– Considering visiting Milford Sound / Piopiotahi, no kids

“Extra cost feels very un-Kiwi, and like it is profiteering. It will be important to manage how this is communicated, so that it doesn't deter people.” – Previous visitor



Previous visitors show a greater dislike towards the fee, instead suggesting that ‘risk-based’ pricing or a fee that is embedded into operator tickets could be a more discreet and better option

NZers who have previously visited Milford Sound / Piopiotahi express greater dislike of the proposed fee, and would like the fee to be more discrete for international visitors.

Previous visitors viewed Milford Sound / Piopiotahi as an already costly experience, so while they are seeking greater preservation of the area, there is a heightened desire for Milford Sound / Piopiotahi to be a destination accessible to many, and they worry that international visitors could become priced out.

Risk-based pricing was suggested, so that the more someone contributes to the damage of the environment (such as through staying the night, using the land, or going on the boats) the more money they pay.

Some people suggested a basic fee, followed by an additional impact fee too. Regardless, NZers want to know how the fee would be collected so that it is fair and controlled.

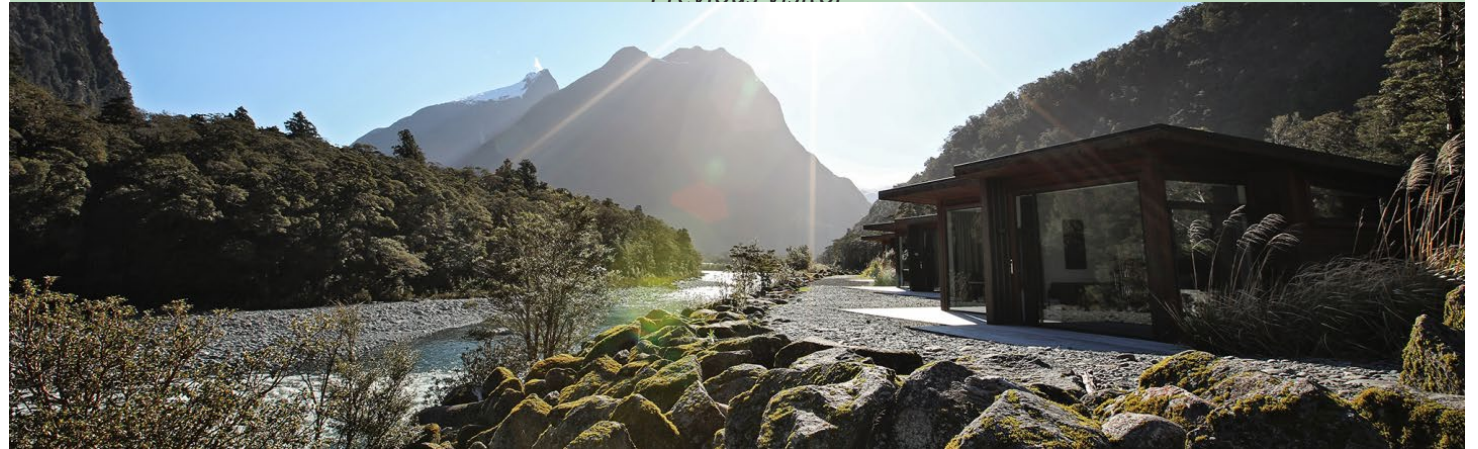
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“I hate it. It’s like tipping in the USA. A bus fee could cover part of the fee towards conservation, so that it doesn’t feel like an added cost.”

– Previous visitor

“Feels like there’s all these little extras. Embedding it into other fees is a good way to help for needed infrastructure.”

– Previous visitor



Proposition: Prohibiting cruise ships and removing the aerodrome

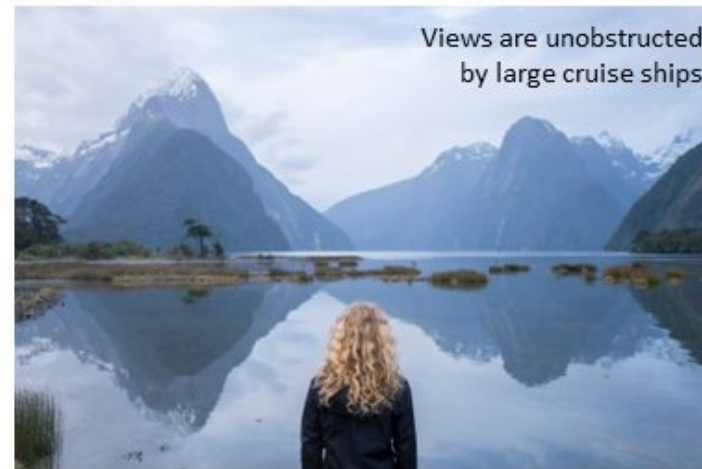
Prohibit cruise ships from entering Milford Sound / Piopiotahi and remove the aerodrome

The masterplan suggests banning cruise ships from entering Milford Sound / Piopiotahi to preserve the natural environment and reduce pollution in this World Heritage site.

Visitors can still travel by land and experience the sound by water on smaller boats that depart locally.

By banning cruise ships, visitors can view the place in its natural setting.

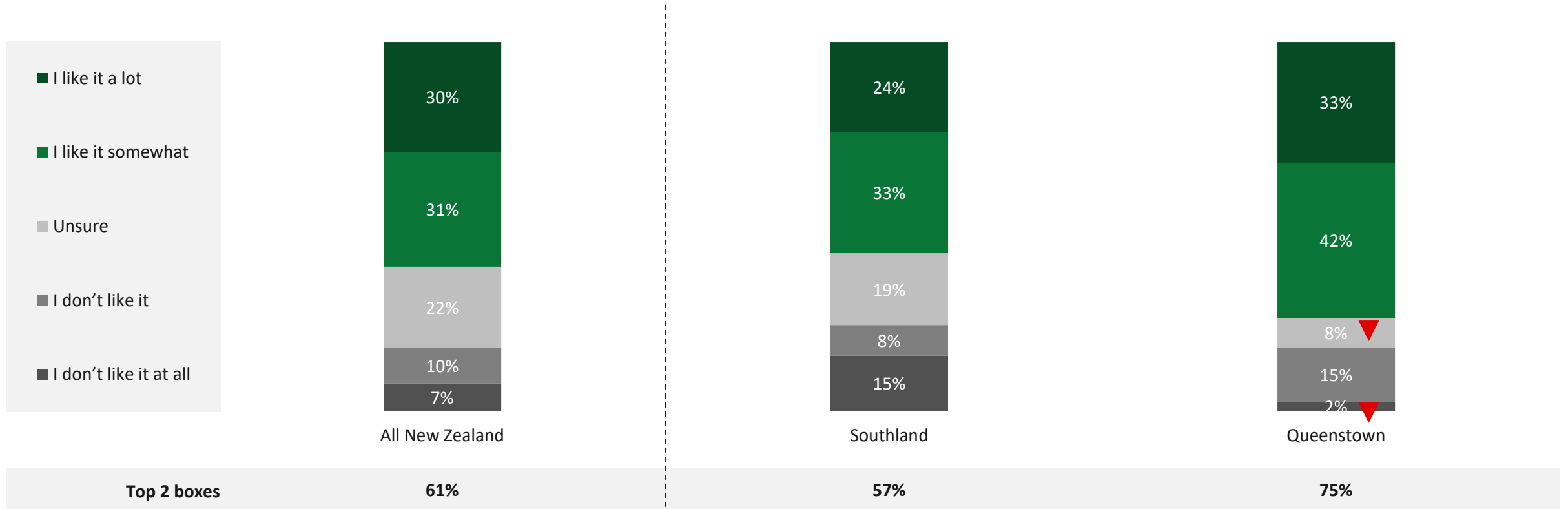
The masterplan also suggests removing the aerodrome and adding a heliport in an appropriate location. The proposed heliport would cater to both visitors for scenic flights and emergency response teams.



Most NZers are in favour of the proposed changes to access to Milford Sound / Piopiotahi by cruise and air, but 17% of them do not support this idea – indicatively, there is less support for the idea among Southlanders

CAUTION: SMALL SAMPLE SIZES FOR SOUTHLAND AND QUEENSTOWN, INDICATIVE ONLY

Likability of the proposition: **Prohibiting cruise ships and removing the aerodrome**



NZers are largely in support of banning cruise ships due to their impact on the environment, with many supporting operation of smaller boats



What is liked about the proposition: **Prohibiting cruise ships and removing the aerodrome** – verbatim comments

Ban big cruise ships

- “If cruise ships are pumping effluent into the water and contamination with fuel residue then they should be banned. Not sure why you would ban or reduce the planes? Is this a noise issue?” (Northland)
- “Banning cruise ships and promoting the use of smaller boat tours” (Manawatu-Whanganui)
- “I do not think cruise ships are appropriate for this area - my only concern would be if by banning them from Milford they go to an even more sensitive area of Fiordland instead” (Southland)

Protecting the environment

- “Maintaining the natural environment and limiting pollution as much as possible” (Canterbury)
- “Large cruise ships are detrimental to environment and should be banned in majority of places” (Otago – Dunedin)
- “Will decrease environmental impacts of such large ships, also the large ships are an eye sore on the surrounding environment. A day trip should be offered to cruise passengers instead” (Otago – Dunedin)
- “Cruise ships are ugly in the environment and are not good for marine life” (Otago – Dunedin)

Reducing pollution

- “It will decrease pollution in this natural environment, in turn helping the environment” (Manawatu-Whanganui)
- “It brings more money into the smaller tour businesses and lowers pollution to the area” (Otago – Waitaki District)
- “Less impact on the environment from large ships (erosion, pollution, etc.)” (Wellington)

Using smaller boats

- “At least you give smaller boats access as that's how I would like to view this area” (Auckland)
- “I like the idea of banning the big cruise ships and having smaller locally owned boats, as well as the helicopter option” (Southland)
- “Happy for large cruise ships to be banned, as long as the more local smaller boats can still operate. All good to remove aerodrome and replace with heliport, as long as there's some air access” (Otago – Queenstown)

Cruise ships in Milford Sound / Piopiotahi are a visual contrast to the beautiful surroundings and are perceived to harm the environment – however, the extent of damage is not clear

Similar to international visitors, NZers stress that cruise ships are both a visual and mental pollution to Milford Sound / Piopiotahi.

Visually, cruise ships block the iconic view of Mitre Peak.

And, contributing to the greatest frustration, mentally, cruise ships are the epitome of environmental damage, which can cause upset as Milford Sound / Piopiotahi is prized for its natural beauty and untouched ecosystem.

There is a clear desire to reduce damage to the environment, however, people are not sure if one big cruise ship is worse than many small boats.



“

“The thought of a cruise ship in Milford Sound is awful. It’s not just the emissions, it’s the human waste.”

– Considering visiting Milford Sound / Piopiotahi, family

“This is a great idea. I imagine a picture without a cruise ship would be so much better.”

– Considering visiting Milford Sound / Piopiotahi, no kids

“There’s nothing eco about a cruise ship.”

– Previous visitor

“But is 1 cruise ship more harmful than 100 small boats? I don’t know. It’s hard to know what is the more sustainable option.”

– Considering visiting Milford Sound / Piopiotahi, no kids

Those with a less favourable response to banning cruise ships are worried that the local operators will lose business

There is a concern that banning cruise ships would lead to less money to the local economy and tourist operators. NZers who hold this concern largely do not realise that cruise ship visitors do not disembark from the cruise boat. Regardless, this apprehension reflects a palpable desire to protect tourism operators and local business.

It was suggested that instead of an outright ban, Milford Sound / Piopiotahi should consider managed, reduced cruise ship access instead – to ensure the economic benefit to the region prevails.

NZers also suggested that only allowing more sustainable cruise ships could reduce the damage to the environment while not adversely impacting local economy.

“

“Reducing the number of visitors is a positive, however it also means less money coming into Milford Sound.”

– Considering visiting Milford Sound / Piopiotahi, no kids

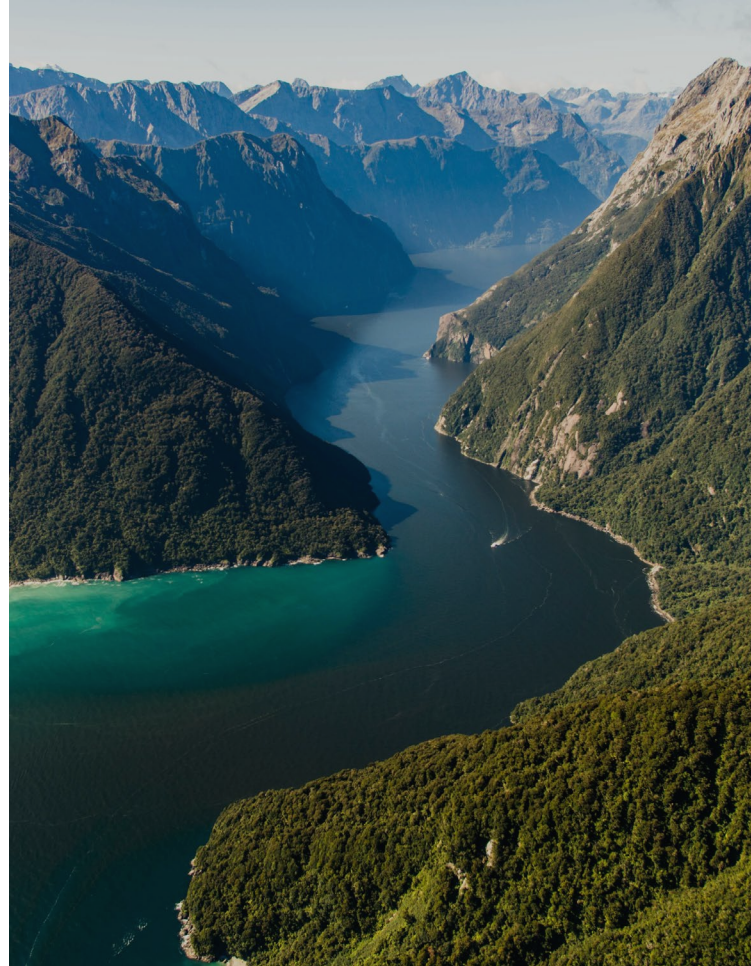


The idea to remove the aerodrome was met with scepticism, with NZers assuming the trade-off would be more damaging

Even when the benefit of removing the aerodrome was made clear to NZers (i.e. closer experiences to nature and better view platforms) there was concern that removing the aerodrome would cause more harm to the environment. Helicopters are seen to be damaging to the environment through noise pollution, as well as impacting birds and wildlife.

NZers assume that removing one aerodrome will also result in the creation of multiple helipads and commercial development.

Safety was also a consideration – with New Zealanders wanting to know what would happen in an emergency.



“

“Why is the airstrip a problem? Will they just build 100 helipads instead?”

– Considering visiting Milford Sound / Piopiotahi, family

“Remove the cruise ship, but not the plane – 25 people fit on a plane, vs 4 on a helicopter.”

– Considering visiting Milford Sound / Piopiotahi, family

“What, are they taking 1 away to add more?”

– Considering visiting Milford Sound / Piopiotahi, family

“Would 1 helicopter be enough?”

– Considering visiting Milford Sound / Piopiotahi, no kids

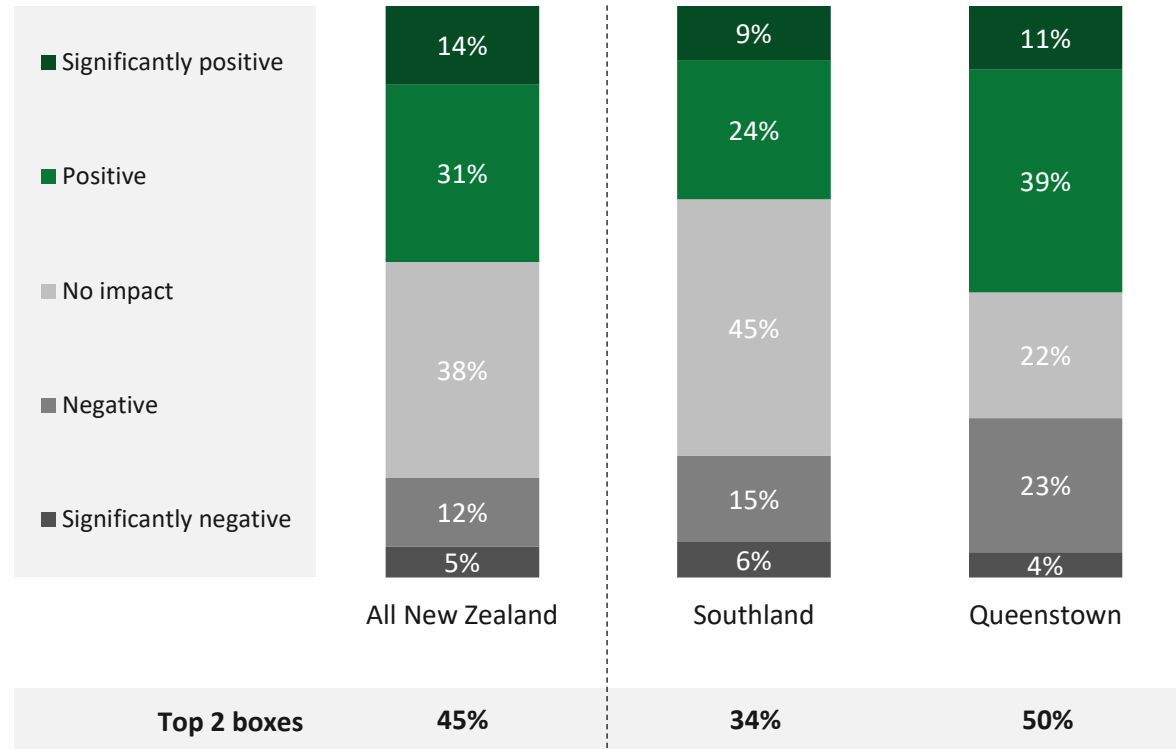
“Could they get a floating plane instead?”

– Considering visiting Milford Sound / Piopiotahi, no kids

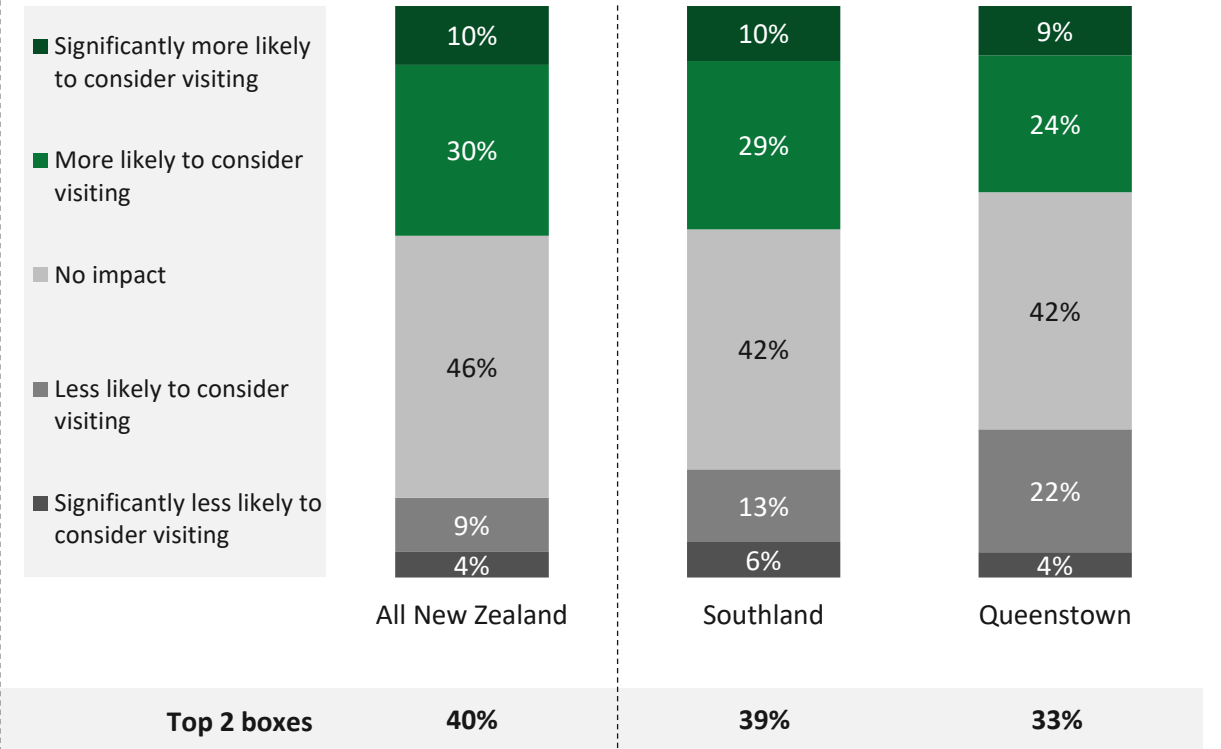
While most NZers anticipate no negative impacts on their decision to visit Milford Sound / Piopiotahi and their experience there, there are some, particularly in Southland and Queenstown, who expect a negative impact

CAUTION: SMALL SAMPLE SIZES FOR SOUTHLAND AND QUEENSTOWN, INDICATIVE ONLY

Impact the proposition might have on visitor experience at Milford Sound / Piopiotahi: **Prohibiting cruise ships and removing the aerodrome**



Impact the proposition might have on consideration to visit Milford Sound / Piopiotahi: **Prohibiting cruise ships and removing the aerodrome**



Proposition: Manage access / transportation with Te Anau as a visitor hub

Manage access / transportation with Te Anau as a visitor hub

In 2019, Milford Sound / Piopiotahi had 870,000 visitors, putting high stress on local infrastructure and roads. Congestion is worst between 11am and 3pm due to many visitors travelling from Queenstown and back within a 12 hour round trip.

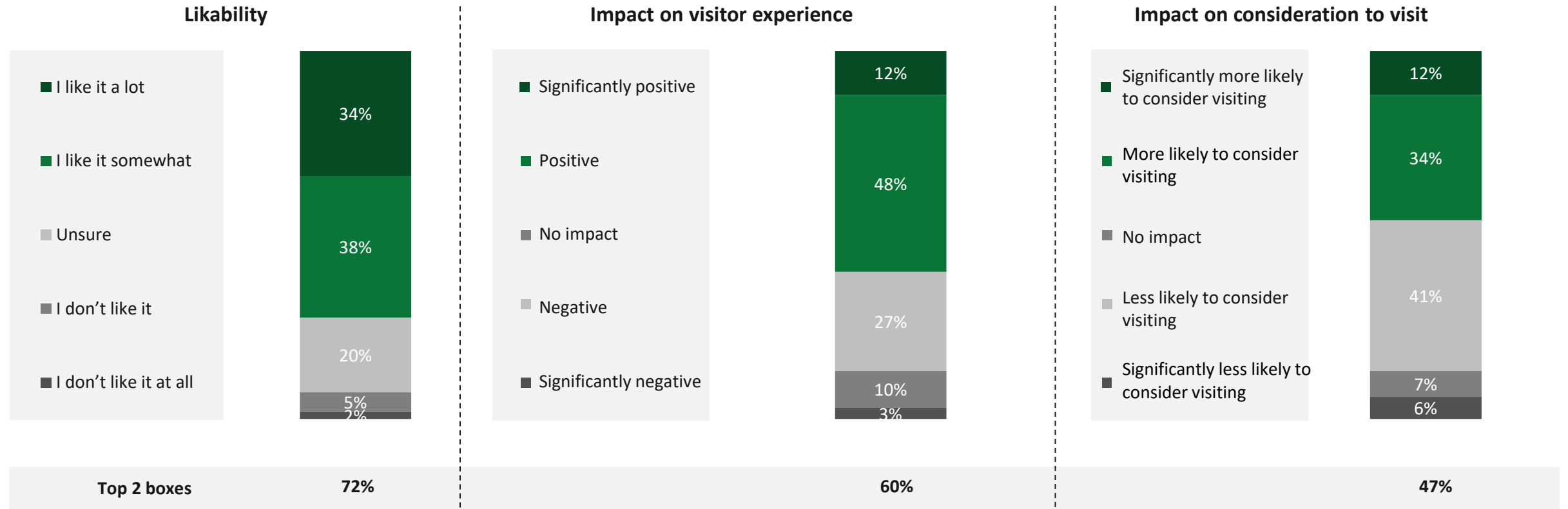
The new plan suggests using hop-on / hop-off zero-emissions buses and a park and ride service from Te Anau to control access and reduce congestion. This will also give visitors an opportunity to experience more of the Southland region's beautiful landscapes and wilderness tourism, especially south of Te Anau.

- Scheduled express buses will run throughout the day, allowing passengers to hop on and off at key points of interest along Milford Road
- Private vehicle access and parking will be limited and must be booked in advance. This includes parking for recreational activities such as fishing and hiking
- This will reduce congestion at Milford Sound / Piopiotahi, allowing for greater visitor numbers overall, and preserving the place's character
- There will be more and enhanced visitor activities and short stop experiences (glow worms, lake activities / crossings, trails, cycle tracks, Kepler Track)
- Visitors will be encouraged to start their Fiordland experience at Te Anau, rather than Queenstown (see top left map of distances and travel times). This will allow visitors to take their time and experience a range of activities along the way in the Southland region, making for a richer overall experience



The majority of New Zealanders like the idea of having managed transportation options when visiting Milford Sound / Piopiotahi – naturally, responses are somewhat more subdued among Queenstown and Southland residents, who are more inclined to prefer self-driving options

Likability and impact of the proposition: **Manage access / transportation with Te Anau as a visitor hub**



Managed access is perceived to be safer, better for the environment, and an enabler of a more enjoyable experience

Managed access was viewed very positively for enabling visitors to experience Milford Sound / Piopiotahi at greater depth through a variety of activities, removing the pressure to view the fiord within a tight timeframe.

Hop-on / hop-off buses were also seen to create a safer environment for all while reducing the congestion on the roads, and contributing to a more environmentally-friendly destination.

Glass-roof buses were seen as particularly favourable, as they could foster a unique experience that allows visitors to see more.



The proposition receives support as it aims to alleviate congestion in the area via hop-on / hop-off buses and dispersing traffic from Queenstown



What is liked about the proposition: **Manage access / transportation with Te Anau as a visitor hub** – verbatim comments

Hop on hop off bus	Te Anau as the hub	Reduce congestion	Less traffic
<ul style="list-style-type: none"> – “Love the idea of hop on hop off buses, which will give the tourist a lot of flexibility and allow all travellers to enjoy the trip; not just the passengers in a car. Definitely love the idea of zero emission buses with viewing decks. Also like the idea of Te Anau as a hub, as it would hopefully encourage people to stay there the night before rather than doing one super long trip” (Auckland) – “Love the hop-on hop-off idea. Makes it easier to get around and see everything” (Otago – Dunedin) – “Hop on hop off bus a good idea for international tourists” (Southland) – “Zero Emission travel is a plus. Having the option of hop on hop off is great” (Otago – Queenstown) 	<ul style="list-style-type: none"> – “Having Te Anau as the hub instead of Queenstown. I have regularly shared the road with self driving day tourists returning to Queenstown after a long day at Milford and lost count of the near misses I have witnessed. Te Anau would benefit enormously. Low emissions public transport doing hop on hop off would be fabulous only if space on busses allow for the more spontaneous approach” (Otago – Dunedin) – “Reducing buses from Queenstown and giving most visitors a more environmentally friendly hop on hop off bus option” (Southland) – “I like the hop on hop buses and encouraging tourists to start at Te Anau” (Southland) 	<ul style="list-style-type: none"> – “It aims to reduce congestion but also considers reducing the impact on the environment” (Auckland) – “I feel like this will help the locals with the congestion issue plus i like the idea of the multiple buses going to different destinations” (Wellington) – “Reducing congestion and more tourism to Te Anau area” (Southland) – “Restricting the congestion Hop on hop off buses. Great idea. Less traffic less impact” (Otago – Queenstown) – “Less congestion (and bad drivers) off the road is worth doing, hop on and off buses an excellent idea. The less traffic on the roads the better. Not only for safety reasons but environmentally a better option” (Otago – Queenstown) 	<ul style="list-style-type: none"> – “Reducing the traffic on the road can only be good for the environment” (Manawatu-Whanganui) – “It seems like it would manage the traffic (people and cars) flow better and allow people to make short trips to the sounds” (Bay of Plenty) – “The idea of buses to reduce traffic and environmental impacts is positive” (Auckland) – “Reducing private traffic and offering more carbon-friendly transport with the hop on and hop off flexibility” (Otago – Dunedin) – “It gives Te Anau status as a tourist hub, and reduces traffic along the Milford Road and tunnel” (Auckland)

However, managed access is viewed as something for international visitors, not domestic – with Kiwi travellers less willing to give up their freedom and unrestrained access to Milford Sound / Piopiotahi

Kiwis are accustomed to their car – and they have a deep sense of attachment to the ability to roam free, unrestricted. There is an underlying sense of ownership and natural rights to New Zealand’s land.

These feelings are heightened amongst Southland locals, who want to know that they can easily access Milford Sound / Piopiotahi as and when they wish. Locals already feel priced out of Milford Sound / Piopiotahi, and this idea risks creating additional perceived exclusions.

For New Zealanders to uptake hop-on / hop-off buses, this method of transport must be quicker, cheaper, and more convenient.

Some NZers suggested retaining the option for New Zealanders to drive themselves to Milford Sound / Piopiotahi by allowing a number of bookable car parks.



Further to this, there are strong concerns that Te Anau's infrastructure is not set up for an increase in tourists, and the subsequent impact this would have on locals

There are deep concerns about the negative impact a managed access hub would have on Te Anau and its infrastructure. Te Anau is already seen to be at its tipping point, with locals unable to secure housing due to limited infrastructure.

Moving the Milford Sound / Piopiotahi hub or starting point to Te Anau would put greater pressure on Te Anau's infrastructure, and require further, systematic growth. However, locals are looking to preserve Te Anau's small-town charm and largely, do not want this.



“

“Would this just push the problem to Te Anau?”

– Previous visitor

“This will make Te Anau busier. It is already a big enough destination as it is. There's 267 Airbnbs and 2 rentals – so I don't see how this is going to work.” – Southlander

“Te Anau as a hub is positive, and the idea that Te Anau could get a slice of the pie is nice, HOWEVER only if they want it, AND they have the infrastructure.” – Previous visitor

“There's already no where for people to live and move into already in Te Anau.” – Southlander

“It's important not to ruin the feel of Te Anau already.”
– Southlander

Proposition: Develop enhanced nature and cultural experiences

Recognise and develop landscape, conservation, and cultural experiences

Milford Sound / Piopiotahi is known for its world class biodiversity, landscape, and natural beauty. Visitors will have more opportunities to interact with nature and local Māori culture through this plan.

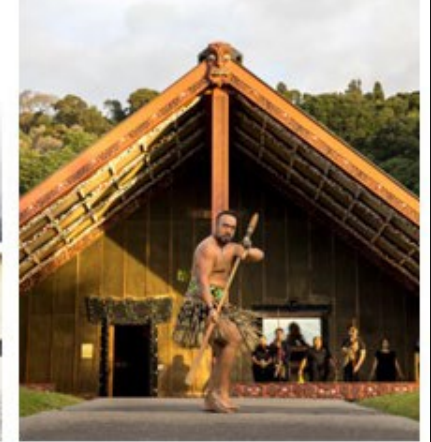
The plan aims to:

- Create visitor experiences that showcase the landscape, natural ecosystems, and cultural heritage, such as an outdoor exhibit providing geographical or historical information
- Provide authentic New Zealand experiences by engaging with Ngāi Tahu, celebrating local Māori history and culture, and educating visitors about the place and its people
- Create sustainable infrastructure that blends with the natural setting, such as walkways that protect the environment and buildings that use renewable resources

Concept image of infrastructure that respects and enhances the natural environment, and engages visitors in Māori culture



A traditional Māori welcome



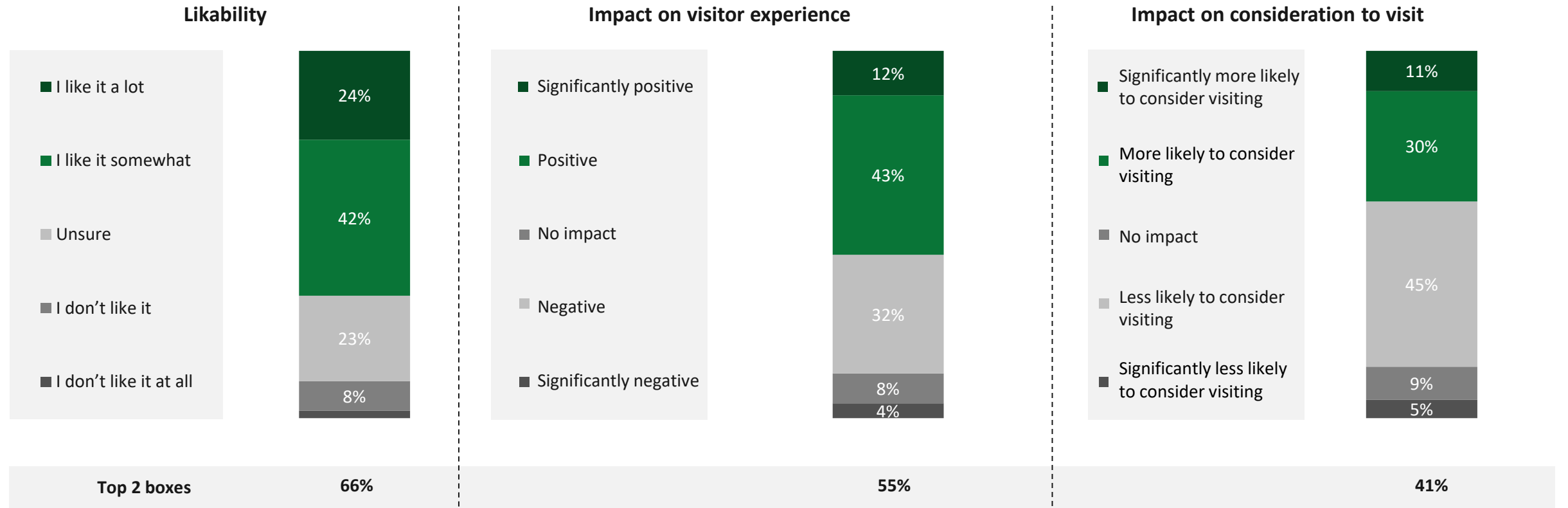
Hongi – a traditional Māori greeting



Trails that minimize visitor impact on the natural landscape

The proposed enhanced landscape, nature, and cultural experiences are generally well-received by NZers, however, they are expected to have only a moderate impact on influencing the decision to visit Milford Sound / Piopiotahi

Likability and impact of the proposition: **Develop enhanced nature and cultural experiences**



Sustainable infrastructure and integration of the indigenous culture are the elements of the proposition NZers particularly like



What is liked about the proposition: **Develop enhanced nature and cultural experiences** – verbatim comments

Sustainable Infrastructure

- “Kai Tahu are important and are recognised as such. Looking toward the long term. Sustainable ideas that preserve environment e.g. walkways so people can enjoy but nature doesn't get harmed any further” (Central Otago District)
- “Engagement with Kai Tahu is important - enabling visitors to gain a cultural understanding of the area is brilliant. Sustainable infrastructure that blends with the environment is great idea as do not want to detract from natural beauty of the area” (Otago – Dunedin)
- “Sustainable infrastructure and walkways are a good idea” (Waikato)

Māori culture

- “The local iwi is being engaged to provide the most comprehensive and authentic experience for visitors. They're choosing to share their community with visitors” (Northland)
- “I think the set footpath is a good idea for not only the environment, but also to make the journey easier. I think involving Māori culture also makes the place more interesting and more reflective of New Zealand” (Auckland)
- “Experiences that showcase Māori culture in a positive light and scenic walkways with minimal impact on the environment” (Auckland)
- “I think connecting to the Māori culture is very cool, and is a great idea for the Milford Sound area” (Canterbury)

Protecting the environment

- “I like point 3 regarding the improvement to infrastructure without conflict with the environment” (Waikato)
- “This plan accentuates the positive New Zealand aspects and looks after the environment” (Marlborough)
- “The idea of walkways to help protect the environment” (West Coast)

Providing walkways

- “Safe walk ways is a must. Also it would be great to have more of an understanding of the natural ecosystems” (Auckland)
- “Outdoor exhibit would be good. Making walkways that would be safe for all people, e.g. prams and wheelchairs and disabled people” (Southland)
- Using trails that mean users stay to the walkway and not traipsing through other areas. Involving the local iwi” (Wellington)
- “Integrating walkways protects the land and makes my kind of mobility easier. Integrating Māori learning experiences showing the links of land with people seems good” (Auckland)

Connecting Māori culture to Milford Sound / Piopiotahi was seen by many as a way to enhance the experience, enabling greater education, context, and appreciation of the land

Many New Zealanders are looking for greater education of our land and destinations, and view Māori culture as a lens to better understand this.

Incorporating Māori history and storytelling in the natural environment is intuitive to many (although not all) – and would enable the land to be “framed correctly” to give the place context.

To some, it is a surprise that there is not already a deeper tie to Māori culture at Milford Sound / Piopiotahi, as this is becoming more mainstream and expected in 2023.

“

“I would go all the way back to Milford Sound to see this.”

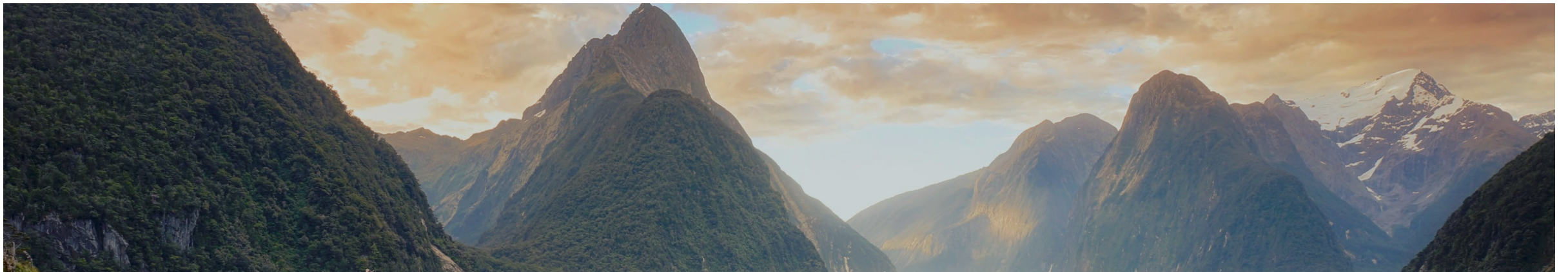
– Previous visitor

“I like this form of development. Its less destructive to the land.”

– Previous visitor

“This would be educational for children and adults.”

– Considering visiting Milford Sound / Piopiotahi, no kids



However, authenticity and meaningful consultation is key to ensuring Māori culture is represented correctly and wholeheartedly

Consultation with Māori is critical to ensuring authenticity of experience.

Largely, NZers believe that iwi and mana whenua should be autonomous decision-makers in how the land is framed, the cultural experience, and how Māori is represented in Milford Sound / Piopiotahi.

NZers also want reassurance that this is something Māori genuinely want, and feel positive about.

“

“Good consultation is key.” – Previous visitor

“It is critical to ensure iwi and mana whenua are consulted in the process, and it is something they want.”

– Considering visiting Milford Sound / Piopiotahi, family

“It is important that it is genuine, not cultural appropriation – this can be done by autonomous decision making by Ngai Tahu, and rich cultural consultation.” – Southlander



There is some resistance to an excessive focus on Māori culture, and some believe that other locations in the country are better suited to offer a cultural experience



What is disliked about the proposition: **Develop enhanced nature and cultural experiences** – verbatim comments

Making it all Māori

- “I am a NZ born person, and believe not all “authentic NZ experiences” should be about Māori’s” (Southland)
- “Did the Māori have a marae there or were they travelling through, I detest how people are trying to change history and facts” (Otago – Queenstown)
- “The Māori part. People want to enjoy the specular scenery” (Southland)
- “Too much emphasis on Māori culture rather than just highlighting the place itself” (Otago – Queenstown)
- “There is enough Māori cultural attractions in places like Rotorua etc.. this is nature at its best - keep the human settlement out of it as much as possible” (Auckland)

Cultural aspects

- “Keep the cultural stuff away from Milford. Te Anau maybe” (Waikato)
- “I know from traveling overseas cultural shows get overwhelming seen one too many” (Canterbury)
- “Not fussed on more Māori cultural options got enough in other areas of NZ” (Canterbury)
- “Cultural experiences. There are other places to get those in NZ. Not targeted for kiwis” (Waikato)
- “Seems quite racist - prioritising one culture above the many others in New Zealand. Domestic tourists don't need “educating” about cultural issues while they're on holiday” (Auckland)

More construction

- “The construction of the pathways and the buildings will lead to a further impact on the environment and could possibly kill native plants or species in the process of building. Especially with the construction of the walkway as the areas will have to be walked on, and construction areas take up a large amount of space” (Bay of Plenty)
- “Could become gimmicky/ artificial visitor experience if too much development happens” (Southland)
- “More construction - walkways etc that will detract from the natural experience” (Southland)

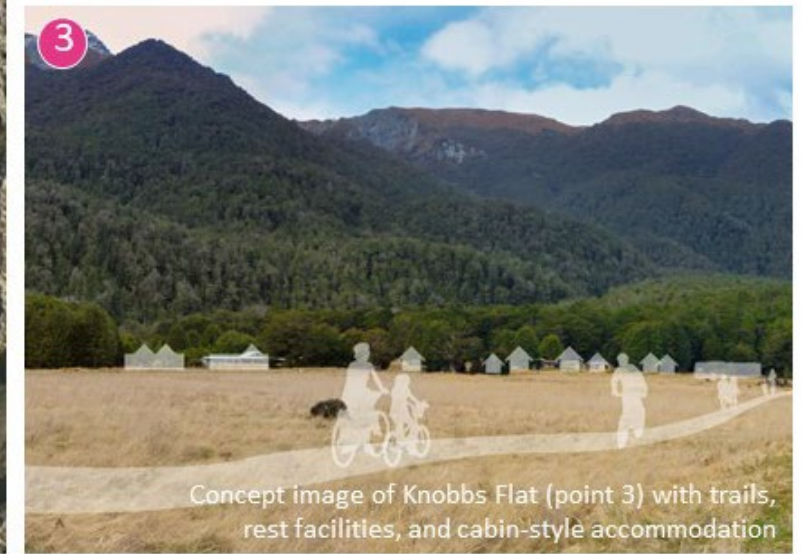
Proposition: Develop multiple experiences along Milford Road

Develop multiple experiences along Milford Road around key points of interest

The plan will offer diverse experiences at select points of interest along Milford Road, so that the visitors can choose how they engage with the place. Offering a range of activities at select points, away from ecologically vulnerable locations, will protect biodiversity and landscape in the area.

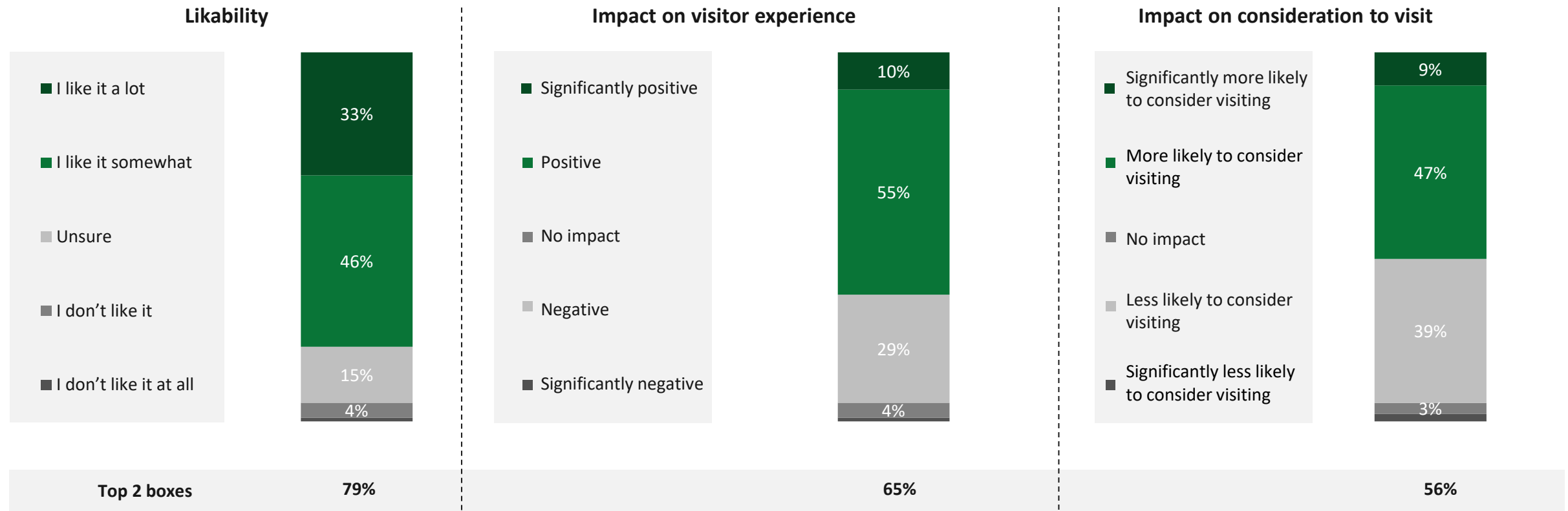
The masterplan aims to:

- Include stops at points of interest, with hop-on hop-off access on Milford Road. This will offer a range of experiences, such as day and night nature experiences, river flats / grassland walks, and cycling
- Enhance accommodation along Milford Road including improved sites for camping, cabins, and campervans
- Enable visitors to easily travel to other Southland locations such as Manapouri, Rakiura, the Catlins and the south coast
- Expand the network of cycle paths and walking / hiking trails with greater connectivity along Milford Road, and to other Southland locations



The idea of having multiple experiences along Milford Road is highly likeable, and for a large proportion of NZers it is likely to improve their consideration to visit Milford Sound / Piopiotahi

Likability and impact of the proposition: **Develop multiple experiences along Milford Road**



Multiple experiences along Milford Road have the potential to stretch and enrich the Milford Sound / Piopiotahi experience for domestic visitors

Providing further opportunities for NZers to enjoy Milford Sound / Piopiotahi was met with positivity. For many NZers, a trip to Milford Sound / Piopiotahi is currently seen as a “once in a lifetime trip”, because the fiord is the primary destination. However, with this proposition, **NZers can envision themselves staying longer, not rushing the experience, and having a reason to return to Milford Sound / Piopiotahi.**

The cycle trail was particularly favourable for Southlanders – who see it to enable them free, unlimited access to their land.

However, while this proposition was seen to enrich NZers’ experiences, NZers also expressed concern that this would need to be implemented with iwi consultation – to ensure their land is respected. The impact on Te Anau should also be strongly considered, particularly if more NZers will be spending multiple days in the area.

“

“I could see myself spending more time than I would have.” – Previous visitor

“This could encourage me and my family to do multiple trips to Milford Sound. Right now we see it as a once in a lifetime experience, particularly because of the cost and that once you’ve done it, you’ve ticked the box.”

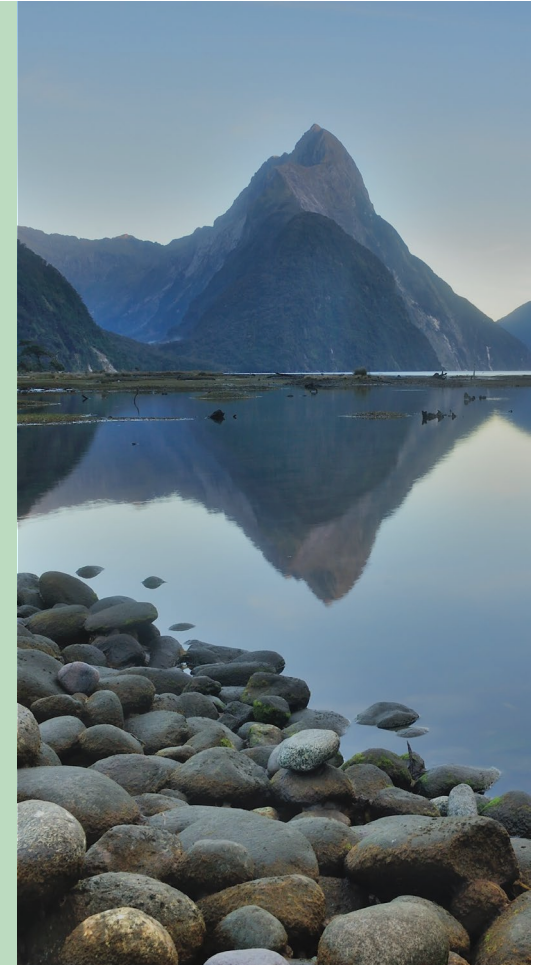
– Considering visiting Milford Sound / Piopiotahi, family

“This is interesting, but it would have to be done properly with local iwi and environment front of mind.”

– Considering visiting Milford Sound / Piopiotahi, family

“Extending the cycle trail is positive. Southlanders can get a piece of the pie that Queenstown has, but the impact on Te Anau needs to be strongly considered.”

– Previous visitor



The ideas of diverse accommodation options, additional walkways and a variety of activities are well-received as they provide visitors with compelling reasons to visit



What is liked about the proposition: **Develop multiple experiences along Milford Road**– verbatim comments

Accommodation options	Options on route	Hop on hop off	Different accommodation
<ul style="list-style-type: none"> – <i>“Having places of interest pointed out and walks etc will enhance the whole experience there's so much to see on this side. Having accommodation not in Milford is a great idea” (Otago – Queenstown)</i> – <i>“The possibility of introducing alternative accommodation and building a cycle network” (Canterbury)</i> – <i>“Options for hop-on, hop-off transport. Improved/more and better accommodation options along the way taking some pressure off Milford Sound itself and offering extra activities, linking to other Southern areas of significance is great” (Central Otago District)</i> 	<ul style="list-style-type: none"> – <i>“Accommodation along the way so the drive from Queenstown isn't so unbearable” (Auckland)</i> – <i>“To be able to stop along the way in and find interesting things to do. More accommodation places” (Otago – Queenstown)</i> – <i>“Giving people more of a reason to self drive with interests and more accommodation options close by” (Marlborough)</i> 	<ul style="list-style-type: none"> – <i>“The improved camping facilities and the hop on hop off transport, this could help reduce accidents on the roads in that area” (Canterbury)</i> – <i>“Hop on and off, more accommodation, more cycling and walking trails” (Southland)</i> – <i>“Hop on hop off service. Improving access” (Wellington)</i> – <i>“I like the hop off hop on idea. It allows visitors to spend more time at areas that are of specific interest. The ability to connect with other areas of interest” (Manawatu-Whanganui)</i> – <i>“The hop-on hop-off system planned and the expansion of the cycleways, allowing for more exploration” (Auckland)</i> 	<ul style="list-style-type: none"> – <i>“EPIC! More walking tracks spreads the load out so not everyone is congested at one spot. More reasons to visit this beautiful part of the world too. Not so sure about the 'hop on hop off'. Would work well for locals, but I can see the Chinese struggling and getting lost. They prefer sticking to the one bus I'd say. More cabins and caravan facilities is great. Love this in general” (Southland)</i> – <i>“Enhancing accommodation, to improve the campsites & cabins etc” (Manawatu-Whanganui)</i> – <i>“Accommodation for all types of tourists from backpackers to campervans” (Auckland)</i>

There are some concerns that adding experiences along the Milford Road could encourage greater visitation, and in turn, spoil the environment even more

While there is interest in enhanced experiences along the Milford Road, NZers are acutely aware of the negative environmental impact that more people in the environment could cause. **This idea is felt to be at odds with the core objective of reducing the environmental impact and burden – as it is seen to encourage visitation to currently untouched areas.**

NZers quickly become sceptical that the Masterplan has a greater goal of attracting more people to Milford Sound / Piopiotahi, to generating greater profit, versus genuine attempts to preserve and protect the environment.

If this proposition were to be implemented, NZers would want to know how the environment remains the key focus and would like to see proactive action to reduce the burden of people in natural spaces.

“

“They should make it more challenging for people to visit Milford Sound – they shouldn’t just make it easy for everyone. Make them earn the reward. Making it too easy means there will be too many people who don’t value the place.”

– Considering visiting Milford Sound / Piopiotahi, family

“I can see why they are pushing people – more money = infrastructure. But at what cost?” – Previous visitor

“This is good to a point – why do they want it to grow though? What is wrong with limiting numbers?” – Previous visitor

“This has the possibility of being used by a large number of people who could negatively impact the environment. Care must be taken to do this right. Police it, make sure it doesn’t impact the natural structure of the land.” – Southlander

Proposition: Harness sustainable practises and green technologies

Harness sustainable practices and green technologies in upgrades & development

Sustainable transport, green technologies, and conservation initiatives are needed to preserve and protect Milford Sound / Piopiotahi and surrounding conservation areas from human impact, ensuring its preservation for future generations.

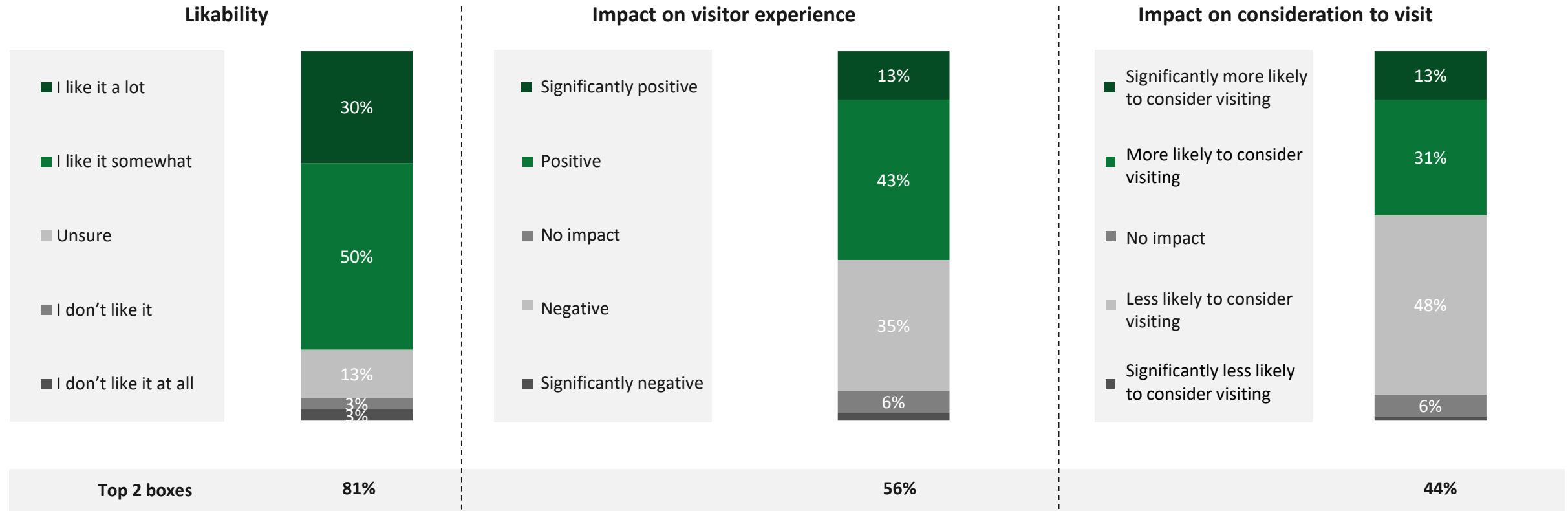
Visitors can expect:

- Infrastructure and transport (such as zero carbon bus fleet) that minimizes energy use and utilises renewable resources
- High-tech, multi-lingual on-board information on busses with informative displays with routes and schedules at bus shelters
- Conservation of resources through passive heating and greywater reuse
- Infrastructure designed to withstand and ensure safety from natural hazards such as earthquakes, rockfall, extreme flooding and avalanches
- Restoration of landscapes using native planting and habitat creation, allowing for tourism to give back and regenerate landscapes and communities



The idea of introducing sustainable practices and technologies in the development of the area is highly likeable, with a more neutral view on whether these changes will impact consideration to visit

Likability and impact of the proposition: **Harness sustainable practises and green technologies**



Sustainable technologies are seen to be an important addition to Milford Sound / Piopiotahi, to preserve its beauty and ensure it is safeguarded for generations to come

NZers view sustainable technologies very positively, and understand the importance of leveraging green solutions to further reduce the impact on the environment.

Many Kiwis described these ideas as 'expected,' meaning there is licence to implement these moving forward. It will be important to ensure these technologies are upkept, and the latest technology is implemented so that the upgrades do not look dated in the near-term.

“

“This is great as long as it is done respectfully, and properly, and is out of the way from the main attractions.”

– Considering visiting Milford Sound / Piopiotahi, no kids

“It will be important to ensure the continuation of investment, so that the technologies don't look dated very soon.”

– Considering visiting Milford Sound / Piopiotahi, no kids



The idea is well-liked due to its long-term and future-proof commitment to sustainability and land restoration



What is liked about the proposition: **Harness sustainable practises and green technologies** – verbatim comments

Zero emissions	Restoration	Being sustainable	Environmental focus
<ul style="list-style-type: none"> – “Zero emissions for transport and eco friendly accommodation. I would have thought hydro power was better than wind” (Auckland) – “All of it! Sustainability is critical for long-term upkeep of Milford Sound. Zero emission busses and wind-powered infrastructure are some of my favourite ideas from it and should be implemented as soon as possible” (Auckland) – “Tourism with zero emissions adds to the attraction” (Waikato) – “Restoration of landscapes using planting etc and the zero emission buses” (Manawatu-Whanganui) 	<ul style="list-style-type: none"> – “Focus on sustainable practice and restoration of natural landscape environments” (Auckland) – “I like the idea of passive heating and also the restoration of landscapes” (Waikato) – “Improvement of safety around earthquakes as part of my hesitation to visit has been due to this concern. Also the restoration of the land is important” (Canterbury) – “Restoration of landscapes with native planting! Zero emissions transport” (Wellington) – “Conservation, energy and the use of renewable resources and the restoration of native flora and fauna” (Manawatu-Whanganui) 	<ul style="list-style-type: none"> – “It’s sustainable and looks after the resource for future generations” (Auckland) – “I love the look of the infrastructures of the accommodation and the way they blend in and adapt around the environment they’re in. The use of Zero emissions bus and windmills are also highly important to the sustainability of the area” (Manawatu-Whanganui) – “Much more sustainable & shows more consideration to the environment” (Waikato) – “The use of green energy and grey water, making sustainable choices. I like this a lot and think it is a key feature of the plan that is not optional but essential” (Wellington) 	<ul style="list-style-type: none"> – “There are environmental options of transport and it shows that they care about the environment and keeping the land protected” (Auckland) – “Trying to keep to the natural environment as much as possible” (Wellington) – “Keep the environment as natural as possible while still being attractive and comfortable” (West Coast) – “It is placing the natural environment first whilst maintaining access for visitors” (Auckland)

Proposition: Establish a new governance model to deliver the masterplan

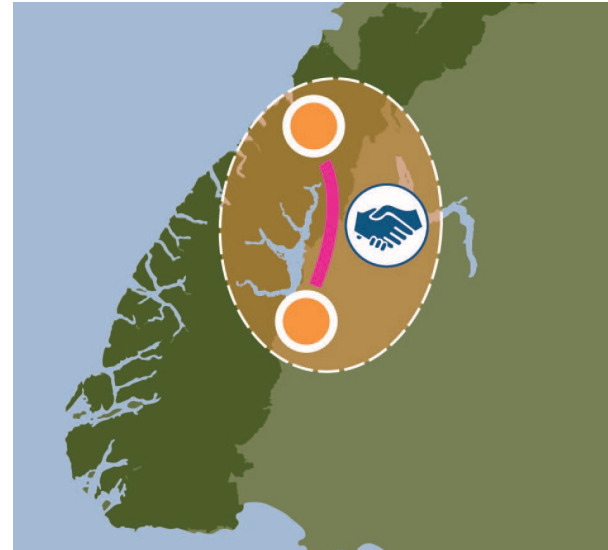
Establish a new governance model to deliver the masterplan

It is felt that the current legislative structure has not been efficient and effective at incorporating multiple points of view (mana whenua, Department of Conservation, private commercial interests, National Park management, etc). Complex ownership arrangements have resulted in difficulty resolving conflicting priorities.

Establishing a new governance model is necessary to realise and deliver the masterplan. It will offer improved service in the short and long term to visitors and enable better partnership with:

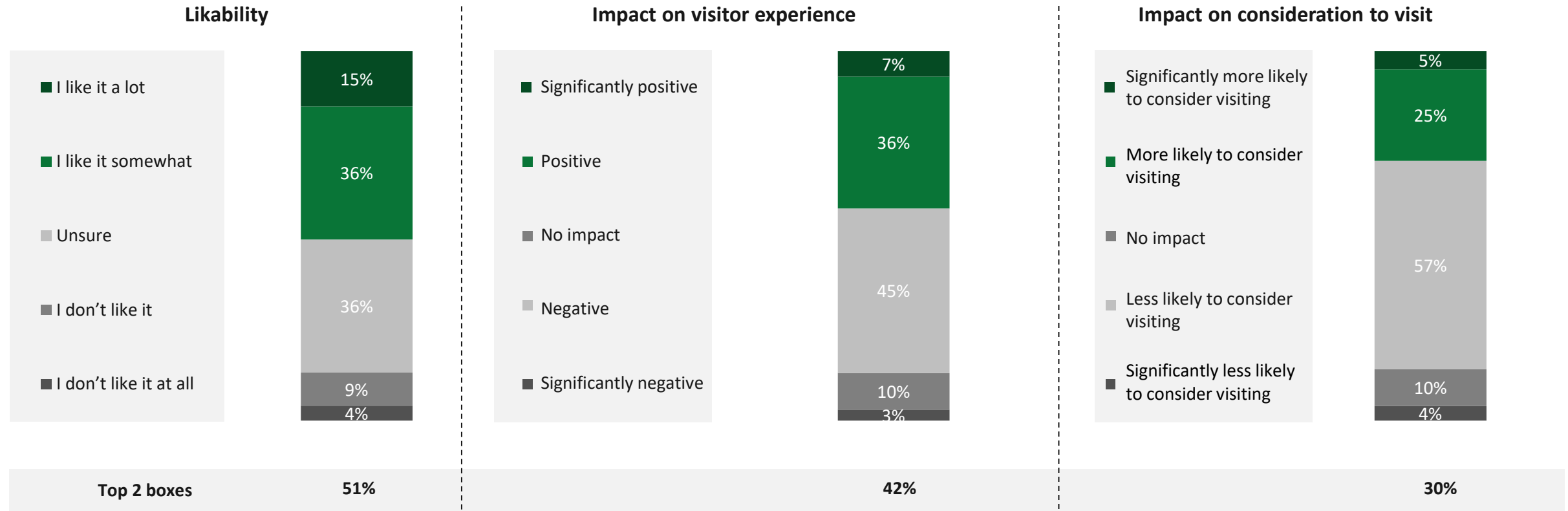
- Iwi and mana whenua (who have previously felt disconnected from decision making)
- Local businesses
- Local communities

This approach will require collective participation and integrated recommendations from the above parties as well as central and local government.



The idea of having a collective governance model for the area is somewhat liked – there is only a small degree of animosity towards it

Likability and impact of the proposition: **Establish a new governance model to deliver the masterplan**



The idea of shared governance that involves local communities, businesses and iwi in decision-making is well-received – these groups are seen as the most relevant and invested stakeholders for governing the area



What is liked about the proposition: **Establish a new governance model to deliver the masterplan** – verbatim comments

Including the local community	Iwi involvement	Local business	Overall involvement
<ul style="list-style-type: none"> – “I like how it will create a better partnership with all the local businesses, companies and iwis allowing them to feel included in what may be planned” (Bay of Plenty) – “Including local businesses, communities, and iwi and mana whenua is a huge step in the right direction” (Auckland) – “Local business and local communities should be given a high priority which will boost them to treat the visitors well and share the happiness by serving them” (Auckland) – “The involvement of the local people toward the new governance program” (Auckland) 	<ul style="list-style-type: none"> – “I like that all interested parties have a say, especially iwi and Department of Conservation” (Southland) – “The partnerships it talks about with iwi, local businesses and local communities” (Southland) – “Including the local iwi in plans to increase the cultural awareness” (Otago – Queenstown) – “I like the cohesion of multiple inputs including iwi” (Manawatu-Whanganui) – “I like that they are making a strong effort to work alongside the iwi's, mana whenua, local businesses and communities. It shows how caring this new model is and it shows respect to these groups who currently feel disconnected from any decision making” (Auckland) 	<ul style="list-style-type: none"> – “I like the idea of different groups being part of the decision making - local iwi as well as DOC and local businesses. I worry, though, that too large a group may hinder decision making or progress on ideas as they may not agree easily on various topics” (Auckland) – “Connection between government agencies like department of conservation, local iwi, local businesses, community and visitors” (Hawke's Bay) – “Local businesses and community involvement” (Waikato) 	<ul style="list-style-type: none"> – “Mana whenua involvement to protect the asset is important” (Manawatu-Whanganui) – “People who have invested interest are involved” (Waikato) – “That it allows all parties involved to have a say” (Waitaki District) – “It is good to improve the relationships to those involved in the tourism of the area” (Bay of Plenty) – “Seems like it will involve more relevant stakeholders” (Marlborough) – “Iwi involvement and joint contribution” (Wellington)

While the good intentions are acknowledged, there are concerns about the potential overrepresentation of certain parties and the practicality of implementing the proposition



What is disliked about the proposition: **Establish a new governance model to deliver the masterplan** – verbatim comments

Too many decision makers

- *“Taking too much direction from “community”, which can lead to a lack of sufficient economic focus. At the end of the day, this is still a business and it needs to be run wisely and contribute to Aotearoa's economy regardless of what greenie “community members” say” (Wellington)*
- *“It has good intentions but it sounds just like a collective. It will require a level headed neutral party to be able to keep everything in check and make sure the balance of power doesn't sway too far in one direction as that tends to be the downfall of these types of democratic decision making parties. If done correctly, it could turn out alright” (Auckland)*

Who gets listened to

- *“Business and commercial interests should not be highly regarded, the beauty and preservation of the land comes ahead of profit” (Otago – Dunedin)*
- *“It doesn't talk about how much say each party gets. I worry that business will have too much say and it will come down to profits rather than the care of the environment” (Southland)*
- *“The new governance model needs to ensure that everybody is actually listened to and included and not giving the idea of inclusion to make people agree to the ideas being forwarded” (Bay of Plenty)*

Over representation

- *“Concerned that some parties will be over represented and others under represented” (Southland)*
- *“All partners would have proportional representation” (Auckland)*
- *“How much will local government be involved” (Southland)*
- *“Hard as there are multiple people involved and will be difficult to reach a decision on things” (Waikato)*
- *“I would hope that once establishing a new governance model it is then promptly implemented and it is not just a paper exercise” (Otago – Queenstown)*

Hard to implement

- *“There are good intentions, but it needs specific steps to do this on the ground” (Manawatu-Whanganui)*
- *“Co governance or partnership models are difficult to manage and are usually costly. I think the wording too obviously tries to avoid the word partnership in favour of participation. I think this is unclear how this would work and is worded carefully by highly trained comms teams, very politic” (Waikato)*
- *“Might be difficult to implement - governance is usually tricky to negotiate and once implemented decision-making may be slow” (Bay of Plenty)*

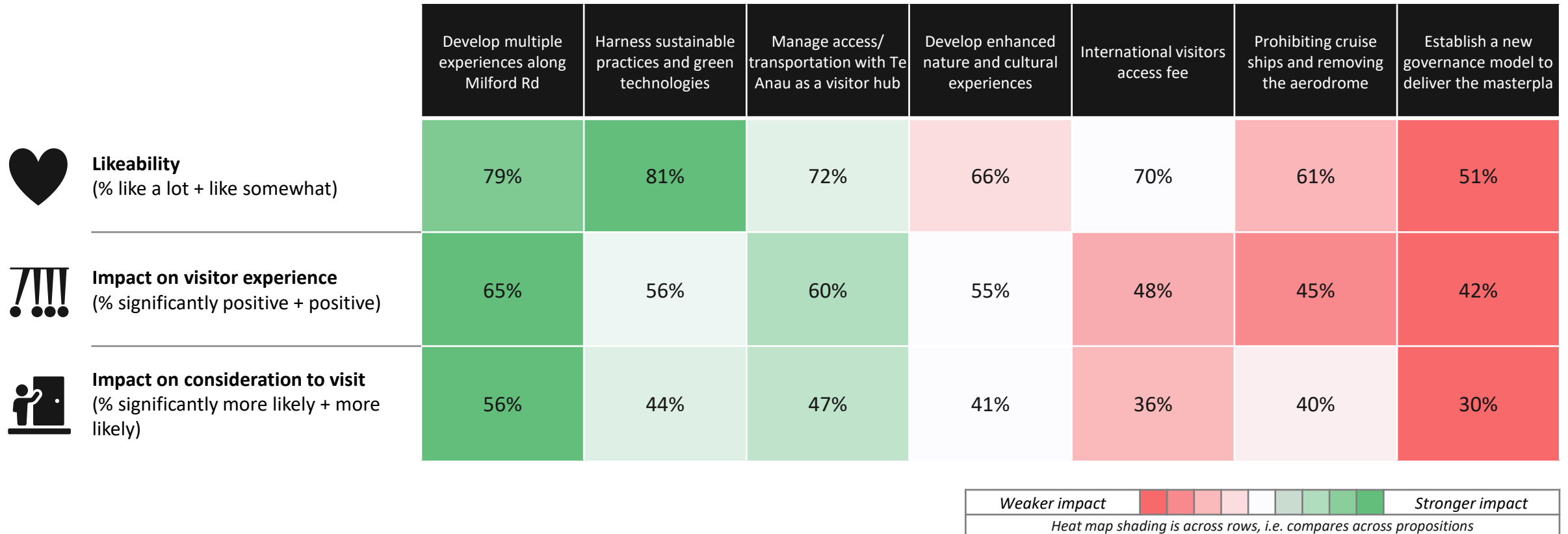
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In conclusion...



For most NZers, propositions that offer new or diverse experiences in the area are more preferred as they provide additional incentives to visit Milford Sound / Piopiotahi

Proposition Performance scorecard



While there is clear receptiveness to the masterplan, to encourage more sustainable visitor behaviours, visitors' relationship and corresponding experience with Milford Sound / Piopiotahi should be considered

- Currently, The Milford Sound / Piopiotahi **visitor experience is predominantly passive** – people come to see, and enjoy from afar (i.e. day cruises)
- This passive relationship means it is difficult for people to develop a genuine connection to the place; and therefore, it is more difficult to get them to look after and care for a place they are not emotionally tied to
- An active relationship with Milford Sound / Piopiotahi – where people feel connected to the land, the culture, and the experience – could support greater efforts to preserve Milford Sound / Piopiotahi

