

Kantar insights: People's views on the Milford Opportunities Masterplan



BACKGROUND

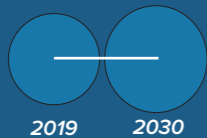
Milford Sound / Piopiotahi is Aotearoa New Zealand's premier visitor attraction and an iconic destination.

The area had been attracting around 870,000 visitors a year before the Covid-19 pandemic and projected to grow to 1.1 million visitors by 2030.

This growth is putting pressure on the natural environment, local infrastructure and roads.

A Masterplan was launched in 2021, and the Milford Opportunities Project is now feasibility testing the proposals.

870,000
visitors a year



1.1 million
visitors by year 2030

THE SURVEYS

Milford Opportunities partnered with Tourism NZ to commission leading data, insights and consulting company Kantar to undertake research into international visitor and local resident perspectives of the Masterplan, and its perceived impacts on the area.

International visitor survey V

Approximately 4,900 survey responses across key markets (Australia, USA, United Kingdom, Germany, China, Japan, India) Approximately 700 respondents per market Mix of future visitors to New Zealand and previous visitors (in the last seven years).

Domestic visitor survey NZ

1000 survey responses representative of New Zealand demographics, including 150 residents of Southland region 100 residents of Queenstown Lakes district 100 New Zealanders identifying as Māori.

Qualitative insight

13 focus groups covering 45 participants (three each for US, China, and Australia, and four for New Zealand).

MILFORD OPPORTUNITIES MASTERPLAN

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 lead to significant improvements in the area.

However, it must have a meaningful impact on restoring the environment.



PLACE

- NZ** New Zealanders take pride in the natural beauty of the place. Piopiotahi is an icon of New Zealand (86% positive, strong positive) and pride fuels determination to preserve for the future.
- V** Visitors see Piopiotahi as the epitome of everything NZ has to offer – it is vital to retain this sense of raw, untouched nature, unique experience, and connection to indigenous and local culture.



86% of New Zealanders agree that Milford Sound Piopiotahi is an icon of New Zealand

EXPERIENCE

- NZ** Over-commercialisation is a strong concern; change must feel discrete with minimal impact on visitors and result in better experience and conservation.
- V** Ideal experience is less development, less environment impact, fewer visitors and basic comfort.
- NZ** **V** Strong expectations to cap/manage numbers through a booking system.
- NZ** **V** Strong support for park and ride option, due to environment, safety and experience impacts. NZ belief that it is more for international visitors.

Piopiotahi is seen by both visitor sets as a natural and untouched experience.

CONSERVATION AND CHARGING FOR ACCESS

- NZ** Protecting the environment and a world class experience are well received. Participation in preserving place important (incl. from Southland, Queenstown).



79% of international visitors support an access fee as proposed in the Masterplan

- V** Strong support for an access charge, seen as "overdue", with willingness to pay in the range of \$90-\$110 per person, although lower from AU visitors.
- V** Visitors bring existing expectations to pay a fee for UNESCO World Heritage Sites and for National Parks.
- V** Minimal deterrence to visiting NZ (<1%).

\$90-\$110
range of willingness to pay

- NZ** **V** Expectation fee reflects environmental impact of visit and includes risk based or differential pricing.
- NZ** **V** Strong expectation any funds are invested into conservation in place, that investment is clear and visible.

IWI, HERITAGE AND CULTURE

- V** Strong support for indigenous and NZ culture experience in place.
- NZ** Connection to culture is a way to enrich the experience and promote connection to place. Must involve iwi and be authentic, and represented well.
- NZ** Some resistance for excessive emphasis – belief place is a natural icon, visitors experience culture in other places (Rotorua).



89% of international visitors like the proposed enhancements to landscape, conservation and cultural experiences

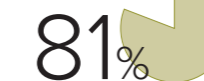
LOCAL IMPACTS

Financial cost to New Zealand is a concern

- NZ** Concern about additional costs from change to Te Anau and wider NZ. This includes concern about cost of living impacts of change to community.
- NZ** Concern about impacts to local businesses from any changes from the Masterplan.



37% of Southlanders see Te Anau becoming too expensive to live for locals



81% like introducing sustainable practices and technology, safeguarding the place for generations to come



The majority (68%) of NZers agree that the Masterplan will stimulate economic growth and create employment opportunities in the area

ACCESS BY CRUISE AND AIR

More work needed on access by cruise and air

- NZ** **V** Strong support to phase out cruise ships from Piopiotahi. Some limited support for maintaining cruise ship access appears to be driven by belief that cruise provides direct Te Anau benefit. Fact base needed.
- NZ** **V** Aviation results are not clear. Some concern that rotary aircraft are worse for the place, and not understanding the case for using the land differently.

Key implications for our work

The themes from this research will help inform the next phases of work, supporting the case for change and how to approach options:



Built infrastructure
Must achieve the right balance of infrastructure, with a focus on less and better.

Managing access

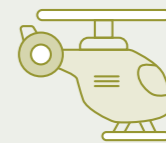
New transport models (e.g. park and ride) are assumed as just-do-it with a focus on international users.



Risk of over-commercialisation
We need to prioritise nature and culture.

Funds for conservation

Important people see a clear vision for where the money goes and why.



Aerodrome
Further work is needed to look at cruise and the aerodrome separately and clarify people's perspective.

Benefit to Southland

Need to consider benefits and the impacts on Te Anau (housing, roads, rates) and operators.



Willingness to pay
Support for an international charge. The area must continue to cater for a range of user groups.