

A scenic landscape photograph featuring a large, moss-covered tree trunk in the foreground that frames the view. Two people are sitting on a wooden bench, looking out over a valley with a lake and snow-capped mountains under a cloudy sky. The person on the left is wearing a dark jacket and a backpack, while the person on the right is wearing a yellow jacket and a red hood.

# KANTAR

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

April 2023

## Business objective

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How might the Milford Opportunities Project Masterplan impact future demand and experience among international visitors to Milford Sound / Piopiotahi?

## Background

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- Milford Sound / Piopiotahi is Aotearoa New Zealand's premier visitor attraction and an iconic destination, that had been attracting around 870,000 visitors a year before the Covid-19 pandemic
- This 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, consumer insight is required in order to:
  - Understand the opportunities and risks with the proposed changes to visitor management and, specifically, the impact they might have on demand and experience among international visitors
  - Understand how well the visitor experience propositions within the Masterplan align with expectations and needs of visitors to the area

# 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 appeal and impacts of the Masterplan and its individual propositions
  - Size specific opportunities and risks with the Masterplan
  - Test impacts and uptake of the international entry fees, at various price points
  
- Approx. 700 respondents\* per market, with a mix of:
  - Future visitors to New Zealand (defined as Active Considerers or ACs)<sup>(1)</sup>
  - Previous visitors to New Zealand, who visited in the last 7 years
  - Australia (AU), USA (US), United Kingdom (UK), Germany (DE), China (CH), Japan (JP), India (IN)

\*Respondents are sampled using an online panel that involves recruiting participants from a pre-existing pool of individuals who have agreed to participate in online surveys or research studies. The respondents are screened to fit our survey criteria and the data is weighted to reflect the demographic representation of each market.

## Qualitative research



- Qualitative research to add depth to the international consumer survey:
  - Explore the ideal “Milford Sound / Piopiotahi” visitor experience
  - Explore resonance of the “Piopiotahi – New Zealand, as it was forever”
  - Add significant depth to feedback on the Masterplan's propositions
  
- Online focus groups, 3 per market
- Approximately 15 respondents per market
- Australia (AU), USA (US), China (CH)
- Mix of future visitors (Active Considerers of New Zealand) and past visitors to New Zealand

## Important note on comparing results between markets

- In multi-market research, we need to be careful when comparing results between markets due to potential cultural response bias. Cultural response bias is the effect of respondents from different cultures answering questions in different ways for quantitative research
- We know that it is common in some cultures to be more neutral when responding to questions, while in other cultures there is a tendency to agree with what is being asked in the survey. Specifically, for the markets we covered in this research, we need to be mindful that:
  - In **China** and **India**, there is a higher tendency to overclaim, to provide more positive responses, and to agree with what is being asked in the survey (acquiescence bias). This is driven by underlying cultural traits such as being a non-confrontational society, wanting to please, wanting to avoid conflict, and "saving face"
  - In **Japan**, respondents have a tendency towards neutrality and using mid-response on rating scales (middling bias) or a tendency to disagree with what is being asked
- Cultural response biases in surveys are not an issue specific to our research, but an issue that we (and other research agencies) observe across all projects. For this reason, we need to exercise caution when comparing results between markets. For markets like China and India, it is also recommended to look at the results in relative terms (such as ranking of the results) rather than the absolute numbers

# Top 6 insights and considerations

1

For international visitors Milford Sound / Piopiotahi represents the epitome of everything New Zealand has to offer – therefore, in the implementation of the Masterplan it is **important to retain as many key drivers to New Zealand** in its experience as possible, such as raw and untouched nature, unique experiences, and indigenous and local culture

2

The **Masterplan receives strong consumer support**: its intentions to create a world-class experience and protect the area for future generations are well understood, and it is seen as giving visitors an opportunity to contribute towards the conservation of the area and enhancing their overall experience

3

The implementation of the plan needs to account for a **tension between visitors wanting 'less' and 'more'** in their ideal Milford Sound / Piopiotahi experience – an ideal experience is a balance of 'less' changes to the environment, less development, fewer visitors, and 'more' immersive cultural experiences and basic visitor comforts

4

The main concerns with the Masterplan are the **risk of overdevelopment and over-commercialisation** of the area that could disrupt the feeling of tranquillity and uniqueness of the place, **loss of personal and authentic experiences**, and **loss of freedom to explore** – thus, the implementation of the plan needs to strike the right balance between infrastructure development, visitor numbers and putting the environment first

5

The proposed international **visitor access fee is largely accepted** across all markets, with minimal risk of deterring visitors from New Zealand – visitors understand and expect entry fees for National Parks, and therefore, across all markets, there is a **high tolerance for paying** to experience Milford Sound / Piopiotahi

6

The proposed **changes to cruise and air access receive strong support** across all markets – most visitors who are considering coming to New Zealand by cruise are still highly likely to visit New Zealand, either by cruise or, alternatively, by air; although there is small risk to Australian and German visitors

1

Motivations and  
barriers to visiting  
Milford Sound /  
Piopiotahi



## For many long-haul overseas visitors, New Zealand as a country is the primary destination – meaning visitors are choosing New Zealand first and foremost, as opposed to specific attractions or places

Qualitative insights for AU, US and CH

- Due to the geographical distance that New Zealand poses to many overseas markets, visitors coming from afar are typically coming to see New Zealand as an all-encompassing destination
- Within that, visitors typically have places that they would like to visit, but qualitatively, visitors from far-reaching overseas markets (US and CH, for example) speak of New Zealand as a whole as the primary destination
- Australians meanwhile, appear more open to a location-restricted break due to their ability to return in the future



# New Zealand's appeal is primarily in its strong-held perceptions of natural beauty

Qualitative insights for AU, US and CH

When visitors think of New Zealand as a destination, their associations are wide-ranging, but typically grounded in nature, outdoors, and scenery



Visitors see New Zealand's outdoor environment to be unlike anywhere else in the world – offering them the ability to relax and rejuvenate, while having a unique, new and different experience.

*“For me it's the beauty of New Zealand and being in a spot that is so different-looking to my everyday life in Houston. The **wow of nature**, and the outdoor activities. I imagine it to look very green and lush, and of course on the water so I can relax too.” – US AC, no kids*

**This means that protecting and preserving New Zealand's natural environment should be a priority in attracting overseas visitors**



While strong interest in New Zealand's natural beauty and environment is universal, the underlying driver is access to experiences different from their own

Qualitative insights for AU, US and CH



***New Zealand is  
GREEN and LUSH***

*Australians want to  
experience an environment  
different to their own*



***New Zealand is PURE, and  
NOT COMMERCIALISED***

*Chinese visitors want  
to experience  
authentic nature*



***New Zealand has BIG,  
OPEN, QUIET SPACES***

*Americans want to feel  
a sense of quiet, calm  
and insignificance*

## For many travellers, New Zealand's culture is a secondary but important motivation to visiting Aotearoa – although this intrigue manifests differently for visitors across markets

Qualitative insights for AU, US and CH



### New Zealand culture is a north-star to respect

*New Zealand culture is seen as a positive example of a country with genuine connection and respect for their own people and indigenous culture*

*"I associate New Zealand with community, kindness and having each others back."  
– AC, pre-family*



### New Zealand culture is a gateway to 'Western Culture'

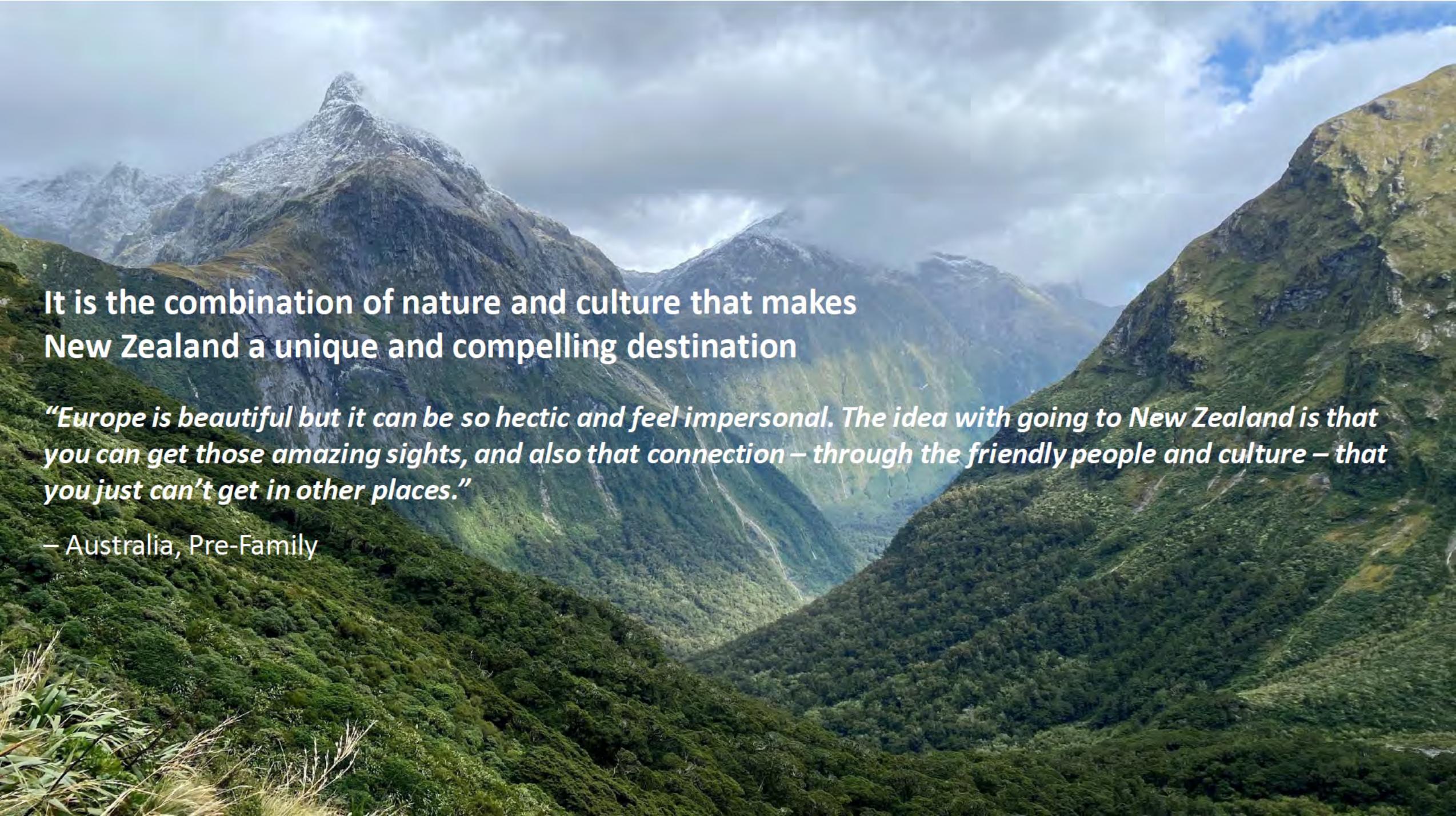
*Bucket-list landmarks offer a way for Chinese tourists to better understand Western Culture and earn social status*



### New Zealand culture is a unique juxtaposition of contrast and comfort

*Friendly visitors, English speaking .... Yet, little understanding of "indigenous culture" – but a sense of exotic, and intrigue due to distance and mystery of New Zealand as a destination*

**While not the primary reason people visit New Zealand, culture is an important element to dial up in tourist hot-spots. Visitors want to deeply engage with New Zealand through a better understanding of the people who live there, our indigenous culture, and explore differences to their own country**

A wide-angle landscape photograph of a mountain range. In the foreground, there are lush green hills covered in dense vegetation. The middle ground shows a deep valley with a winding road and more green hills. In the background, several mountain peaks are visible, with the most prominent one being a sharp, snow-capped peak. The sky is filled with heavy, grey clouds, with some blue patches visible. The overall scene is majestic and scenic.

**It is the combination of nature and culture that makes  
New Zealand a unique and compelling destination**

*“Europe is beautiful but it can be so hectic and feel impersonal. The idea with going to New Zealand is that you can get those amazing sights, and also that connection – through the friendly people and culture – that you just can’t get in other places.”*

– Australia, Pre-Family

# In addition to a greater desire to experience world-class nature and New Zealand's unique culture, visitors are increasingly looking for active and immersive experiences

Qualitative insights for AU, US and CH

People are showing signs of wanting to experience more at a destination: instead of passively seeing a destination, visitors are now taking greater interest in immersing themselves, and understanding the destination in greater depth



In addition to this broader trend, the drivers of this can vary by market...

- When someone is spending a lot of money to travel long-haul to visit a destination, they want to make sure they make the most of their trip through engaging in more experiences and activities
- Whereas, for short-haul travellers, such as Australians, greater engagement or feelings of immersion can be related to time spent at a destination

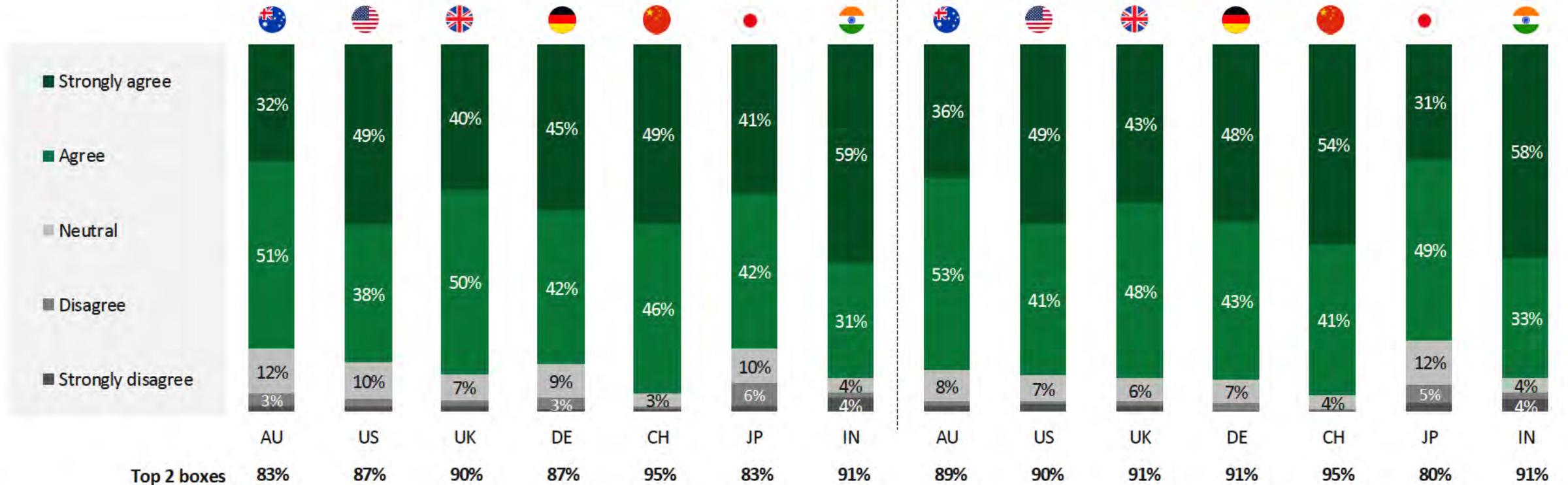
*"I want to spend at least 3 weeks somewhere when I travel. Because I want to get to know the place, and have an authentic experience. I don't just want to do all the tourist things, but really understand what that place is like."*

— Australian AC, no kids

# This shift from passive to active tourism may contribute to the role that visitors see themselves playing in contributing to the conservation of the nature and culture of the host country

Tourists should be contributing to the conservation of the natural environment of the destination they are visiting

Tourism should be contributing to enhancement of the destination's culture and heritage, support local communities and boost local economy



## However, underlying this claimed openness towards greater contribution is the idea that travel is “my big moment”

Qualitative insights for AU, US and CH

Visitors will fall on different parts of the me vs. we continuum; but by default, travel is a “ME” activity – where visitors are largely prioritising their own travel party, and how they can have the best experience on their holiday.



ME



WE



Putting my/our needs as a traveller first

*i.e. “A destination’s environment is becoming compromised by tourism, so I need to go there soon before it is gone.”*

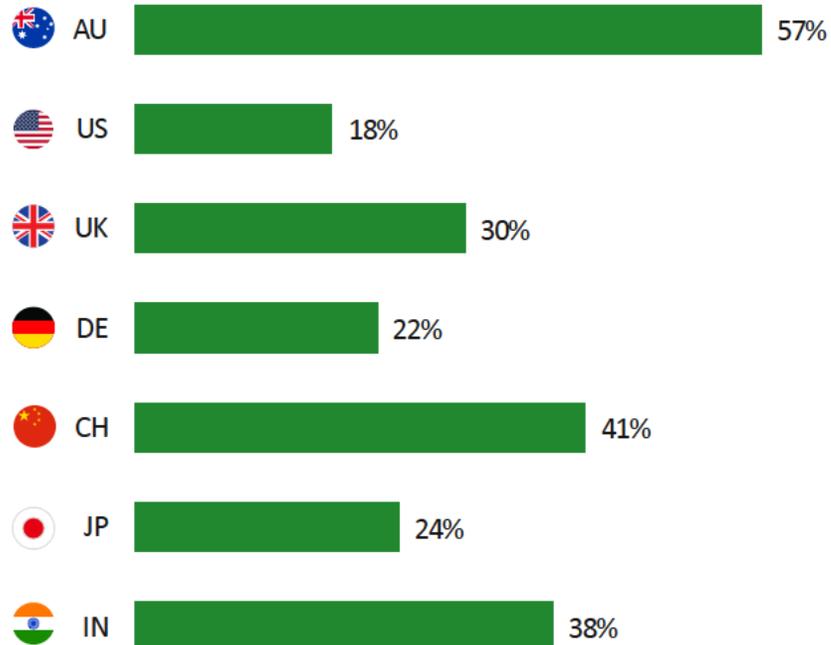
Putting the needs of the destination, and others first

*i.e. “A destination’s environment is becoming compromised by tourism, so I better avoid it until it’s right to return.”*

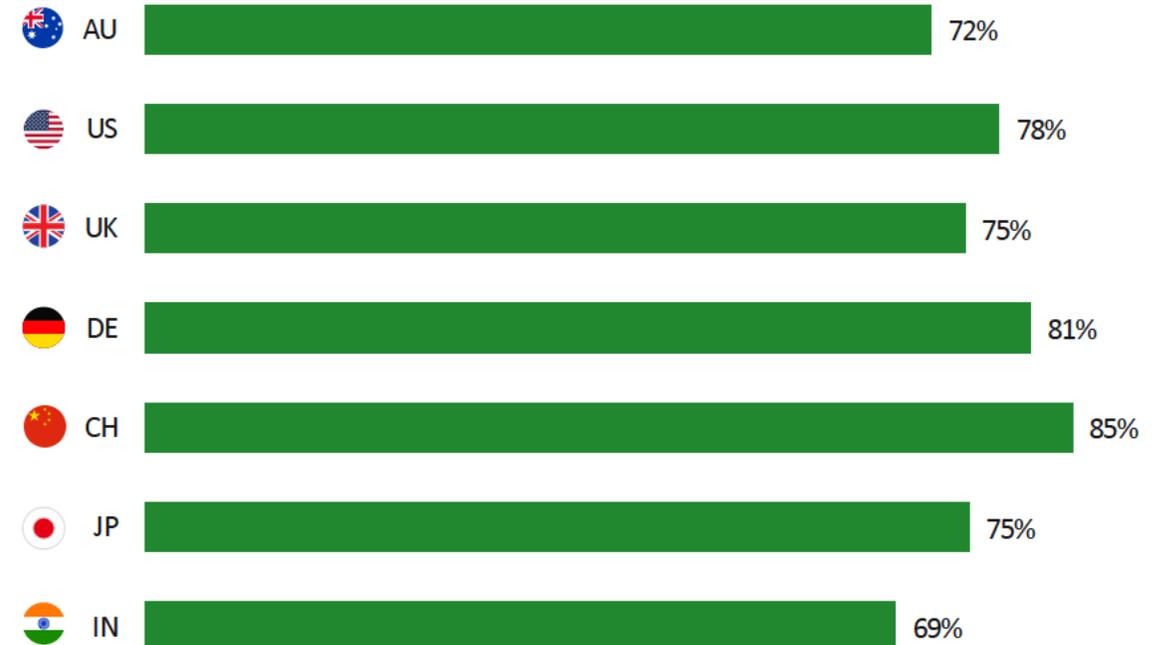
**Despite a travel relationship that is becoming more altruistic and considered in nature, when evaluating the Milford Opportunities Masterplan, tourists will always view ideas with an element of ‘me’ in mind**

# Awareness of Milford Sound / Piopiotahi is moderate, however, most of those who know of Milford Sound / Piopiotahi are interested in visiting

## Aware of Milford Sound / Piopiotahi



## Interest in visiting Milford Sound / Piopiotahi (among those aware)



# Milford Sound / Piopiotahi is a destination and an experience that represents the best of everything New Zealand has to offer

Qualitative insights for AU, US and CH

Even when visitors did not have direct awareness of Milford Sound / Piopiotahi, as a destination it is largely representative of broader New Zealand travel motivations

*“It looks refreshing. Like the air would be crisp, and I would be rejuvenated and more present just by being there.”*

– AU, AC, no kids

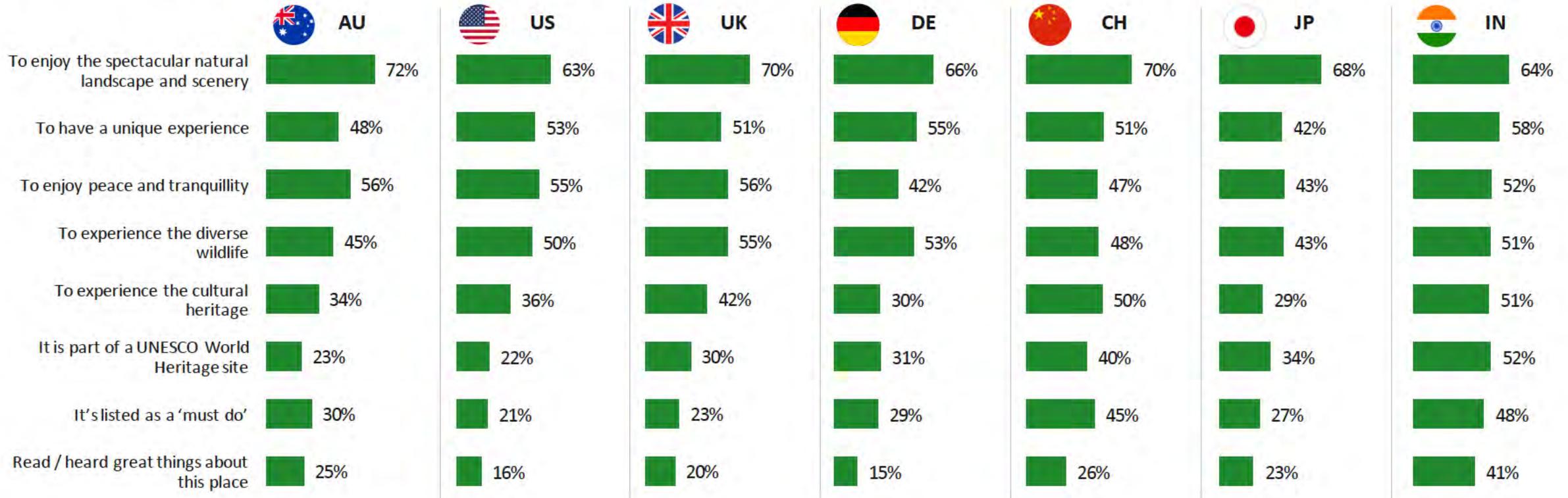
**Milford Sound / Piopiotahi, therefore, must retain as many key drivers to New Zealand in its experience as possible, to continue being a primary destination that tourists seek and make the effort to visit**

**Milford Sound / Piopiotahi can offer tourists many of the things they seek out of a New Zealand holiday:**



# Its spectacular natural landscape and scenery drive visitors to Milford Sound / Piopiotahi, with cultural experiences and being a UNESCO World Heritage site being secondary motivations

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



# Milford Sound / Piopiotahi's UNESCO World Heritage status sets the visitor expectations high and provides credibility that the experience will be extraordinary

Qualitative insights for AU, US and CH

While not a key driver of visitation, the UNESCO World Heritage site recognition is an important justifier in someone's decision to visit Milford Sound / Piopiotahi. The accreditation holds meaning, particularly for American and Australian visitors. We also know, from previous research, that Japanese visitors place very high value on this.

The UNESCO World Heritage status also implies to some visitors that Milford Sound / Piopiotahi would be managed, or controlled so that there isn't over-crowding or damage to the site.

It is expected that a UNESCO World Heritage site is looked after appropriately and sustainably so future generations to come can also enjoy it.



# Long driving distances from Queenstown, challenging road conditions and concerns with overcrowding are potential barriers to visiting Milford Sound / Piopiotahi; thus, there is a case for implementation of the Masterplan to address these barriers

## Potential barriers to visiting Milford Sound / Piopiotahi

	 AU	 US	 UK	 DE	 CH	 JP	 IN
Long driving distance from the nearest large town (3+ hours drive from QTWN)	25%	21%	22%	18%	28%	27%	35%
Tours run by operators are expensive	28%	23%	22%	18%	20%	21%	29%
Too crowded	24%	19%	22%	31%	22%	14%	21%
Poor road conditions to drive in (windy roads, snow and ice during winter)	20%	19%	15%	14%	26%	19%	26%
Activities like scenic cruises are expensive	21%	17%	16%	15%	17%	18%	32%
If I was unable to secure a spot on a nearby great walk	11%	14%	10%	14%	22%	15%	32%
Not being able to drive there myself	14%	12%	10%	8%	15%	17%	21%
Early departure times of coach connections	8%	9%	8%	7%	13%	8%	28%
The place is not safe to visit	9%	14%	10%	9%	14%	9%	15%
Lacks family friendly facilities	8%	9%	8%	8%	11%	9%	25%
Lacks disability access facilities	4%	7%	7%	8%	13%	6%	20%

Strongest barrier    Weakest barrier  
Heat map shading is across columns, i.e. compares within the market

2

## Visitor expectations of the Milford Sound / Piopiotahi experience



# Visitor's expectations and barriers reveal there is a clear tension between visitors wanting LESS and MORE in their ideal Milford Sound / Piopiotahi experience

Qualitative insights for AU, US and CH

There are clear contradictions in what people see as ideal at Milford Sound / Piopiotahi – visitors want less crowds, less development and less change to the natural environment, but equally they want to feel more comfortable, and closer to nature

**LESS**



**MORE**

- Fewer visitors allowed at Milford Sound (less over-crowding)
- Less development and environmental damage (desire for untouched beauty)
- Less touristy experiences – they want it to be authentic, real, raw
- More safety – from better and more modern infrastructure
- More cultural and educational experiences
- More opportunities to immerse oneself in nature and experience nature-based activities
- More creature comforts that enhance their trip – accommodation, cafés, transport options

# The market of origin can play a role in whether someone tends to skew towards 'Less' or 'More'

Qualitative insights for AU, US and CH

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- Less touristy experiences – they want it to be authentic, real, raw

- More safety – from better and more modern infrastructure
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- More opportunities to immerse self in nature and experience nature-based activities
- More creature comforts that enhance their trip – accommodation, cafes, transport options



# The desire for 'less' at Milford Sound / Piopiotahi was slightly stronger among Australians



Qualitative insights for AU, US and CH

- The further you travel, the more you expect in your experience. However, being a close neighbour to New Zealand, Australians are **less likely to need the 'frills'** and comforts when visiting Milford Sound / Piopiotahi
- Australians also have a greater opportunity to visit again – so they have **stronger feelings about preservation and conservation** of the environment and a greater ethos around treading lightly and having less of an impact on the land
- Culturally, Australians (similar to New Zealanders) have a closer connection and place **greater value on nature** – further reinforcing why 'less' was a more appealing option

*“I don't want Milford Sound / Piopiotahi to be reimagined. I just want it to be the same thing as it always has been.”*

– AU AC, no kids

# Whereas visitors from China and the United States generally seek creature comforts, and don't always recognise sustainability as 'less'

Qualitative insights for AU, US and CH



***"I still think they should make an app."***

*– CH, AC, no kids*

Many Chinese respondents see technology as a way to be more sustainable

- They are looking for technology and smartphones to provide direction on how to be a responsible traveller – i.e. reminding them of the rules and clear guidelines to exploring the destination
- Chinese tourists are also of the general perspective that tourists have less of an impact on the environment – and instead locals are more strongly contributing to the problem



***"Please! Take my money!"***

*– US, previous visitor*

Many American respondents see money as a way to be more sustainable

- There is an assumption that they can pay their way to a more sustainable experience – i.e. a fee that gives back to the environment
- This behaviour is engrained in their National Park system, and doesn't necessarily require behaviour change
- If Americans pay the fee, they tick the sustainability box – and can feel good about staying in their hotels, or enjoying comforts in the park

## Being called a National Park, American and Chinese audiences have high expectations for the activities on offer and the sense of freedom they will experience at Milford Sound / Piopiotahi

Qualitative insights for AU, US and CH

Potential visitors make assumptions on the Milford Sound / Piopiotahi experience based on their own National Park systems – however, at the same time, they often idealise how New Zealand might offer a different, or better experience to National Parks in their own countries, such as having fewer visitors



- There will be WiFi and I will always be able to be connected
- There will be some form of development and buildings – a visitor centre, a place to learn about Milford Sound / Piopiotahi
- There will be lots of activities and things to do that I will be able to do independently



- Since Milford Sound / Piopiotahi is isolated, there won't be many visitors there (perception that a small country means few visitors everywhere)
- I will be able to feel alone in the wilderness
- There will be places to stay overnight within "the park"
- I can roam free, do the outdoor activities I please
- Some development – assumption that there will be some hotels, general stores, a visitor centre
- Assumption that there will be transport around the park – hop on / hop off buses

# Qualitatively, an ideal experience is a balance of 'less' changes to the environment and 'more' cultural experiences and basic traveller comforts

Qualitative insights for AU, US and CH

LESS

MORE



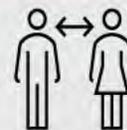
## Experience untouched nature

- Natural beauty – raw, untouched, as it has always been
- Less commercialised – no development that interferes with the environment or is a 'tourist trap'
- Less crowding and people



## Freedom

- To explore what Milford Sound / Piopiotahi has to offer
- To travel on their own time and agenda
- Independence and a sense of customisation



## Connection

- Deeper understanding and connection with the place (education)
- Connection to the people and culture – better understand Māori culture in New Zealand and at Milford Sound / Piopiotahi



## Comfort

- Some development that enables a better visitor experience – i.e. a visitor center, comfortable accommodation, food options
- Safety on roads
- A range of accommodation offerings near Milford Sound / Piopiotahi (or for some visitors, in the National Park)

# The core facilities expected at Milford Sound / Piopiotahi, such as food and café options, viewing areas, and toilet facilities, are consistent across all markets

## Core facilities visitors expect at Milford Sound / Piopiotahi



	 AU	 US	 UK	 DE	 CH	 JP	 IN
Food and café options	67%	58%	69%	53%	62%	58%	66%
Viewing areas	71%	65%	69%	34%	68%	47%	62%
Toilet facilities	74%	57%	72%	41%	30%	51%	55%
Accommodation options	51%	43%	42%	49%	57%	45%	56%
Family friendly facilities	50%	50%	48%	30%	43%	28%	58%
Picnic tables	50%	44%	52%	34%	42%	24%	55%
Camping options	34%	44%	34%	27%	52%	22%	59%
Boat ramp	16%	25%	24%	24%	26%	22%	49%
Disability access facilities	32%	26%	33%	22%	28%	17%	29%

Shading is across columns, i.e. within the market

# Most visitors to Milford Sound / Piopiotahi expect to be able to do day walks and shorter walks – cycling and overnight hikes appeal to the minority



Types of walks and cycleways expected at Milford Sound / Piopiotahi

	 AU	 US	 UK	 DE	 CH	 JP	 IN
Day walks (half day to full day)	66%	58%	65%	64%	41%	49%	51%
Short walks (under 30mins)	65%	51%	58%	39%	45%	34%	44%
Overnight / multi-day hikes	34%	33%	30%	42%	38%	21%	47%
Cycleways – half day to full day	25%	33%	34%	28%	41%	33%	43%
Cycleways – under 2 hours	25%	30%	31%	21%	36%	37%	42%
Cycleways – overnight / multi-day	14%	23%	20%	17%	31%	15%	40%

Shading is across columns, i.e. within the market

# Visitors across all markets expect experiences suitable for all ages and abilities, different boat cruise options, as well as Māori history / cultural learning opportunities



## Types of experiences expected at Milford Sound / Piopiotahi

	 AU	 US	 UK	 DE	 CH	 JP	 IN
Experiences suitable for all ages and abilities	54%	56%	55%	50%	57%	34%	69%
Boat cruise options	57%	48%	54%	52%	59%	42%	60%
Māori history / cultural learning	58%	48%	58%	53%	58%	41%	56%
Visitor centres	58%	58%	61%	38%	42%	30%	51%
Educational marine centres	39%	45%	45%	23%	51%	27%	52%
Gondola lift / cable car	28%	36%	31%	23%	52%	39%	54%

Shading is across columns, i.e. within the market

## Regarding expected transportation options, respondents across markets also expect combined coach and cruise as well as park and ride (and parking)

Types of transportation options expected at Milford Sound / Piopiotahi

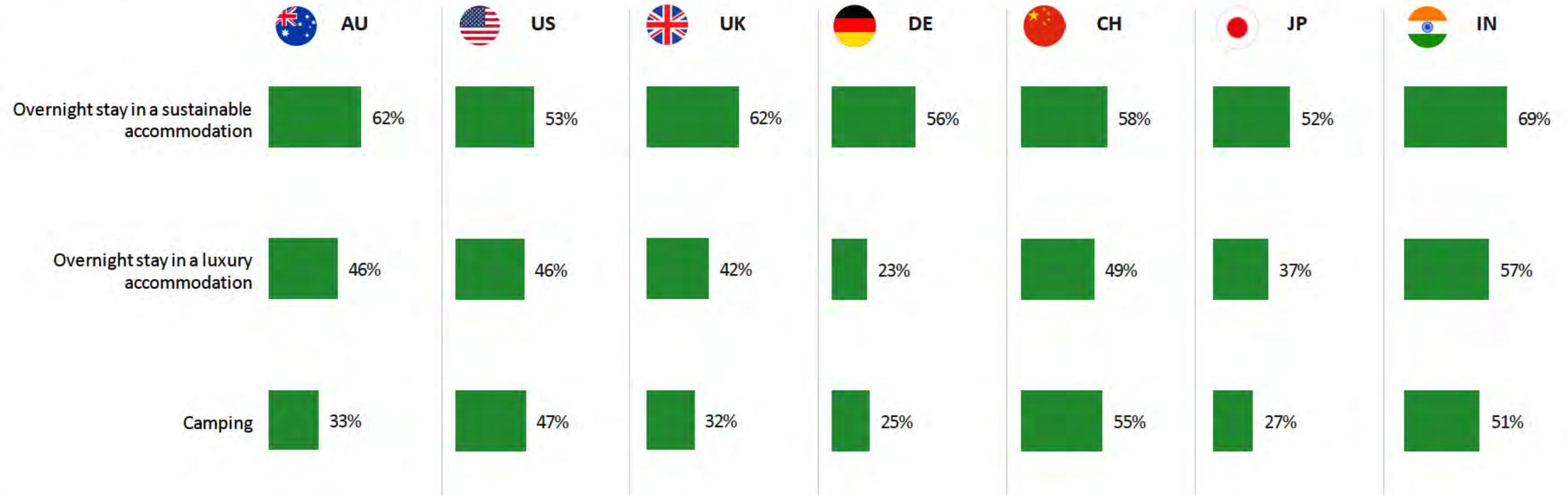


	 AU	 US	 UK	 DE	 CH	 JP	 IN
Combined coach and cruise	50%	42%	44%	38%	61%	49%	57%
Park and ride transport	49%	56%	52%	39%	33%	39%	59%
Parking for self-driving	52%	39%	44%	44%	47%	25%	51%
Zero carbon emission transport options	24%	30%	36%	33%	53%	23%	60%
Helicopter flights	35%	30%	27%	26%	40%	29%	46%
Fixed wing airplane flights	19%	22%	17%	9%	40%	28%	51%

Shading is across columns, i.e. within the market

# In terms of accommodation options, visitors are looking for overnight stays in sustainable accommodation over luxury accommodation or something too basic like camping

## Type of accommodation visitors are interested in



# In terms of paid activities, scenic boat cruises are in high demand for all markets, followed by gondola / cable car experiences

## Paid activities visitors are interested in

	 AU	 US	 UK	 DE	 CH	 JP	 IN
Scenic boat cruise of Fiordland National Park and Milford Sound / Piopiotahi	71%	62%	70%	66%	71%	57%	72%
Gondola lift/ cable car to the top of the mountains / hills	53%	53%	55%	37%	54%	47%	62%
Underwater observatory	53%	54%	54%	43%	55%	41%	50%
Milford Sound cruise	60%	45%	47%	43%	58%	34%	46%
Combined coach and cruise (from Te Anau, a nearby town)	47%	41%	47%	33%	55%	38%	60%
Scenic flight of the fiord	41%	39%	38%	39%	59%	49%	49%
Milford Sound kayaking experience	44%	40%	37%	33%	50%	31%	45%
Luxury coach tour	25%	32%	31%	19%	47%	28%	50%

Shading is across columns, i.e. within the market

3

## Evaluation of the Masterplan



# In qualitative groups, participants from Australia, the USA and China were shown 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?

# The solutions proposed by respondents spontaneously – booking system, visitor fees, sustainable infrastructure – are well aligned with the Masterplan; additionally, respondents proactively suggested to limit visitor numbers for regeneration

## Suggested solutions to the challenges facing Milford Sound / Piopiotahi

Qualitative insights for AU, US and CH

### Balance demand and promote other tourist destinations in New Zealand

- While they would be disappointed to miss the opportunity to view Milford Sound / Piopiotahi, respondents claim to be flexible and there is an assumption that New Zealand is “full of places like this”

### Tell visitors they need to book early

- People are used to booking early for other iconic tourist destinations, so this would not be a new behaviour for them. By booking early, people assume there could be a limit on the number of visitors allowed into Milford Sound / Piopiotahi each day, which could reduce tourist-induced damage

### Introduce some type of fee or toll to support the infrastructure and preservation of the environment

- Many people spontaneously mentioned that there should be a visitor or tourist fee to enter Milford Sound / Piopiotahi. Similar to booking early, this is expected at many tourist destinations around the world, and is common in the National Park system. People assumed the fees could support needed infrastructure and conservation of the environment

### Make better or more sustainable and natural infrastructure with low impact

- Many respondents mentioned that consideration for the environment, and how infrastructure fits into it, is what makes or breaks a place. They do not want to see infrastructure standing out or taking their attention, when Milford Sound / Piopiotahi is the main attraction. Respondents were suggesting more sustainable, natural infrastructure could reduce the impact on the environment

### Limit the number of visitors during certain times of the year to give it time to regenerate

- Visitors have come to expect that their ideal tourist destinations are not always available to visitors. Machu Picchu, Everest Base Camp, and Glastonbury were examples mentioned – where visitors know that they can only visit during certain times of the year, or on certain months

*“It’s about thinking about the long term. If you over do, then we wont be able to go ever. But if people wait, and let the environment rejuvenate, then we can go in the future. If there was information about peak times, off peak, it could help visitors make a better decision about what time of the year they should go ... covid has made people be a bit more flexible”  
– AU, AC, no kids*

## These unprompted solutions also highlight that over-development and commercialisation of Milford Sound / Piopiotahi is a clear concern

Qualitative insights for AU, US and CH

Respondents have seen other tourist destinations become compromised through over-commercialisation, a lack of care for the natural surrounding, or over-crowding, and they worry that this could happen at Milford Sound / Piopiotahi. However, there is an assumption that the more remote a destination is, the less likely it is to be negatively impacted

Destinations respondents see to be at least somewhat compromised:

- Ayers Rock
- Niagara Falls
- Boracay, Philippines
- Machu Picchu
- Everest Base Camp



***“I would be crushed if I found out Milford Sound was like Niagara Falls – a tourist dump.”***

*– US, previous visitor*



# In both quantitative and qualitative research, respondents were presented with a description of the Milford Sound / Piopiotahi Masterplan and asked to evaluate it across a range of criteria

Vision – To Ensure

## “Piopiotahi – New Zealand as it was, forever”

Milford Sound / Piopiotahi is located in Fiordland National Park and is a top tourist destination in Aotearoa New Zealand and a UNESCO World Heritage site.

The area has experienced a number of challenges in recent years. In response, the Milford Opportunities Project (MOP) has been created to ensure the long-term preservation of Milford Sounds, Piopiotahi, whilst providing world class visitor experiences. The (MOP) masterplan focuses on reducing congestion, protection of the natural environment, driving low-carbon yet high quality visitor experiences and incorporation of local cultural storytelling.

There are 10 key ideas within this project:

1. Develop landscape, conservation and cultural experiences
2. Ensure different groups (local/central government, community, local Iwi (tribe) working together to implement the plan
3. Giving visitors more things to see and do in the area
4. Making it easier to get around by reducing congestion
5. Charging international visitors an access fee to contribute towards conservation efforts
6. A new visitor and transport hub in Te Anau
7. Multiple experiences along Milford Road around key points of interest
8. Using technology and practices that are good for the environment
9. Prohibit cruise ships from entering Milford Sound / Piopiotahi and remove the aerodrome
10. Modernise facilities at Milford Sound / Piopiotahi to be world-class

The Masterplan was evaluated on the following criteria (both quantitatively and qualitatively):

- Likeability
- Clarity in communicating the plan’s vision
- Impact on the overall perception of New Zealand
- Impact on consideration to visit Milford Sound / Piopiotahi
- Qualitative feedback on likes / dislikes, tension points, areas for further development

# In its entirety the Masterplan is highly positively received across all markets, indicating a strong consumer support for implementing the proposed changes

## The Masterplan evaluation scorecard

Reactions to and impacts of the Masterplan are softer with the AU and JP audiences, however are still largely positive

	 AU	 US	 UK	 DE	 CH	 JP	 IN	Average <sup>(1)</sup>
 <b>Likeability</b> (% like a lot + like somewhat)	82%	94%	92%	92%	96%	84%	96%	91%
 <b>Clarity in its vision</b> (% Very well + quite well)	76%	91%	90%	86%	95%	79%	96%	88%
 <b>Impact on opinion of New Zealand</b> (% Significant better + slightly better)	62%	77%	77%	72%	91%	74%	81%	76%
 <b>Impact on consideration to visit</b> (% significantly more + more likely)	58%	77%	74%	71%	91%	70%	87%	75%



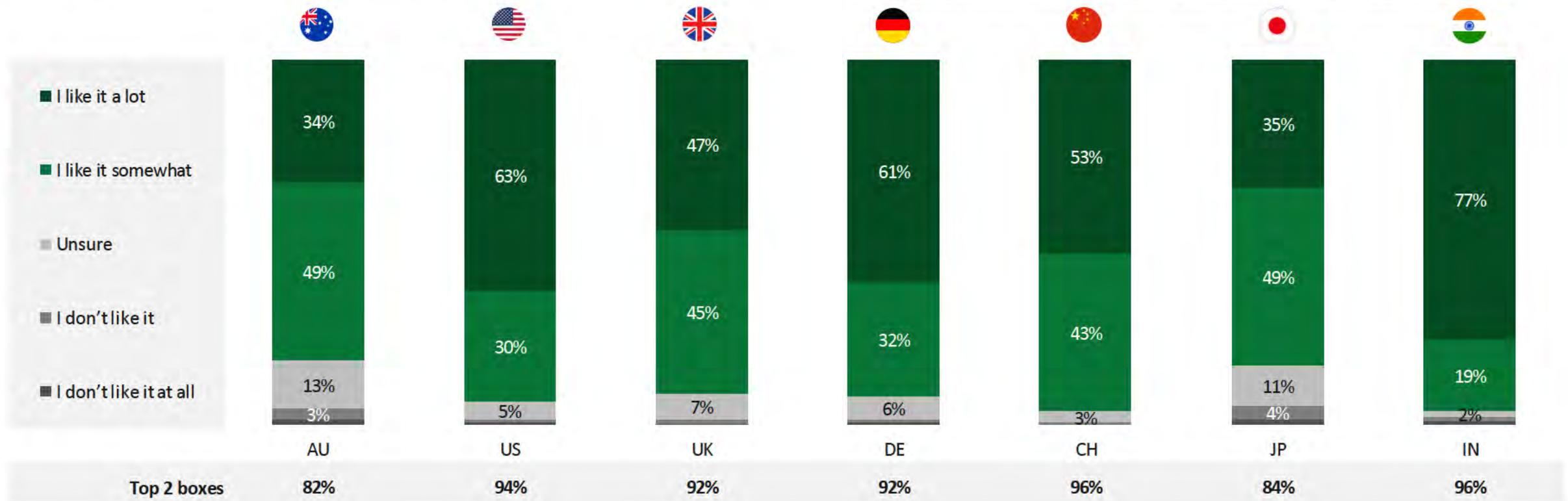
Base: n= AU 700; US 699; UK 701; DE 700; CH 678; JP 700; IN 698

1. A simple average across all markets, and does not take into account the size and potential of the market in terms of visitors. Reported here to provide an indicative overall view
2. All metrics are on a 5 point scale from negative (1) to positive (5), with top 2 positive responses reported

# Immediate reactions to the Masterplan are highly positive, with the vast majority of the target audiences across all markets approving of the plan

## Likability of the Masterplan and its ideas

Compared to the future visitors (i.e. ACs), the likeability of the plan among the past visitors to New Zealand, esp. from Australia, UK and Japan, was softer but yet very positive with the vast majority liking the plan



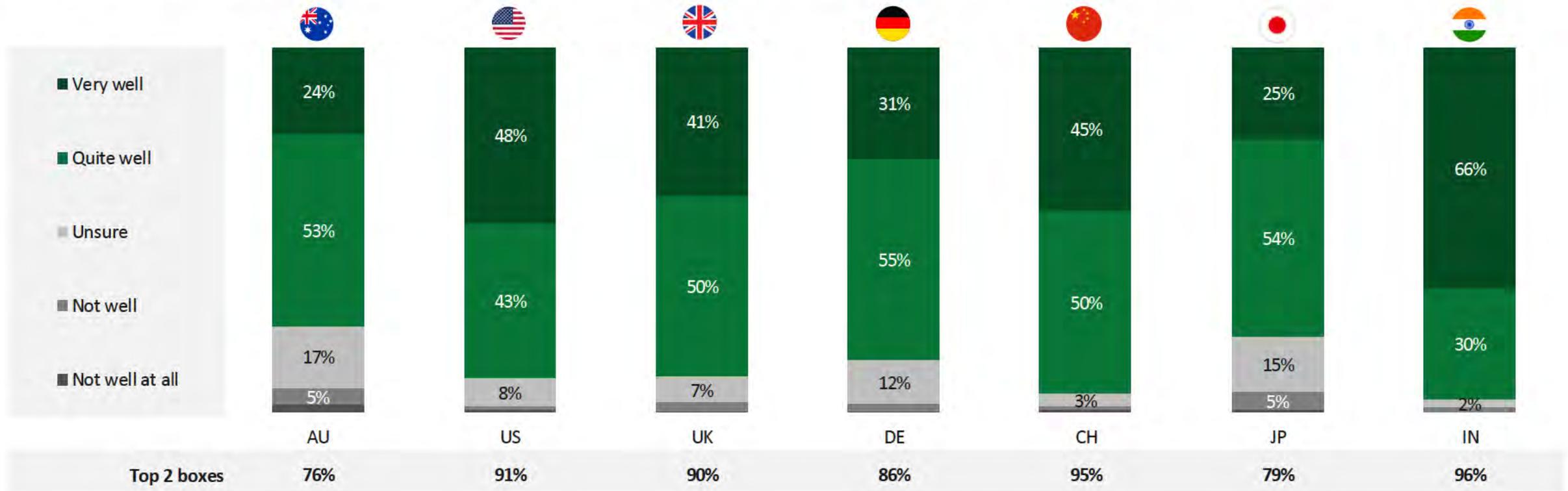
# The Masterplan's intention to protect and conserve nature while creating world-class visitor experiences resonates with key audiences

## Liked elements of the Masterplan – verbatim comments

Intend to protection of nature	Intend to reduce impact on the environment	Desire to create the world-class visitor experience	Conservation initiatives
<ul style="list-style-type: none"> <li>– “I sympathized with the fact that they are focusing on nature conservation and feel the intention to leave it for future generations” (JP)</li> <li>– “Protection of nature, use of modern technology, relief of traffic” (DE)</li> <li>– “I like that I get to see all the fantastic nature around new Zealand” (UK)</li> </ul>	<ul style="list-style-type: none"> <li>– “Closely focusing on the theme of environmental protection and natural scenery, we will show tourists a better tourism experience without destroying nature” (CH)</li> <li>– “Love the program's efforts to protect the environment and provide a great visitor experience” (CH)</li> <li>– “I think that, if visitors want the privilege of visiting such an amazing place, they need to take their obligations seriously and make sure that the impact their presence makes is as low as possible. This seems like a good start towards that” (AU)</li> </ul>	<ul style="list-style-type: none"> <li>– “You can easily experience the great outdoors. You can go sightseeing without feeling guilty” (JP)</li> <li>– “Can provide a variety of experiences” (CH)</li> <li>– “Deliver diverse experiences along the way” (CH)</li> <li>– “Develop landscapes, experiences are eco-friendly, with world-class modernity” (CH)</li> </ul>	<ul style="list-style-type: none"> <li>– “That the idea of nature conservation is very much in the foreground” (DE)</li> <li>– “Revenues from development are used for local nature conservation” (CH)</li> <li>– “Create awareness to contribute more towards conservation of natural resources” (US)</li> <li>– “Conservation aspects and the banning of cruise ships” (UK)</li> </ul>
Strongest in DE and JP	Strongest in CH	Strongest in CH	Strongest in JP, UK, US

# The Masterplan is largely clear in articulating its vision, and thus, has a strong potential to convince the audiences of its positive objectives

## Clarity of the Masterplan in communicating its vision statement “**Piopiotahi – New Zealand as it was, forever**”



# The vision “*Piopiotahi – New Zealand as it was forever*” resonates with visitors as it reflects their main drivers for visiting New Zealand – to experience its raw, untouched, pure nature

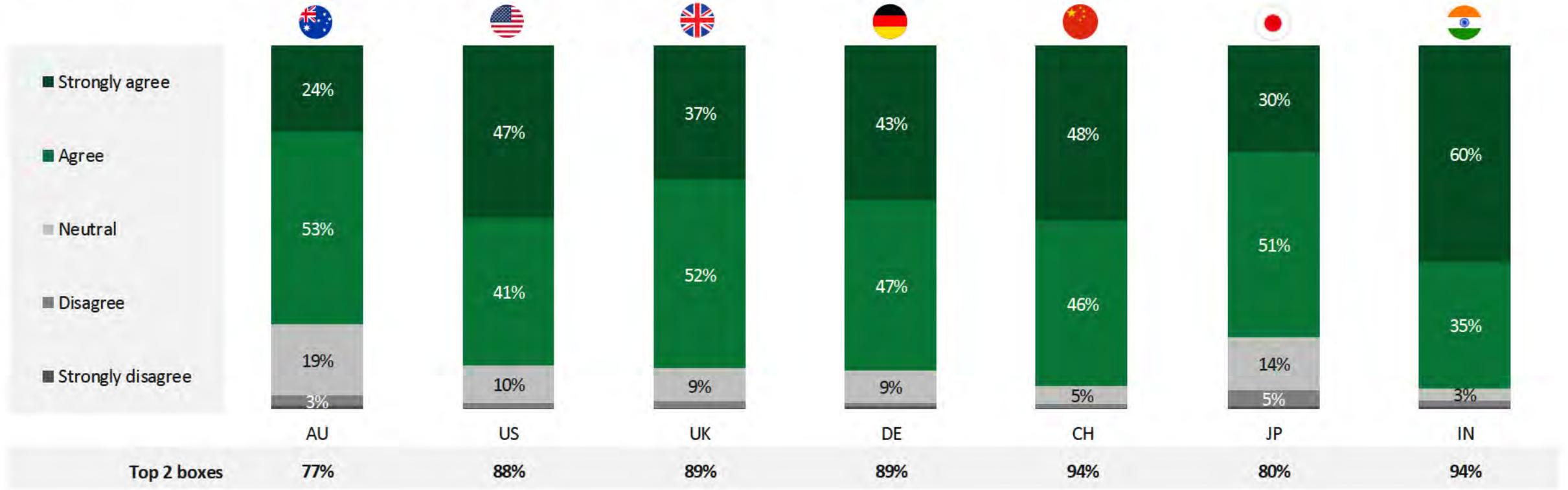
Qualitative insights for AU, US and CH

- The idea of “**Piopiotahi – New Zealand as it was forever**” strongly resonated with potential visitors from Australia, USA, and China as it **encapsulates their primary motivation for visiting New Zealand** – to experience its raw, untouched, pure nature
- “As it was forever” suggests to visitors that this plan aims to preserve the environment, and put conservation first
- The graphics and images associated with “Piopiotahi – New Zealand as it was forever” have well represented the future vision of the plan
- In executing “Piopiotahi – New Zealand as it was forever” consumers expect this to mean **going back to basics and bringing the land back to its pure state vs. adding more to it**



# The plan is seen as aiming to give future visitors a chance to participate in preserving Milford Sound / Piopiotahi

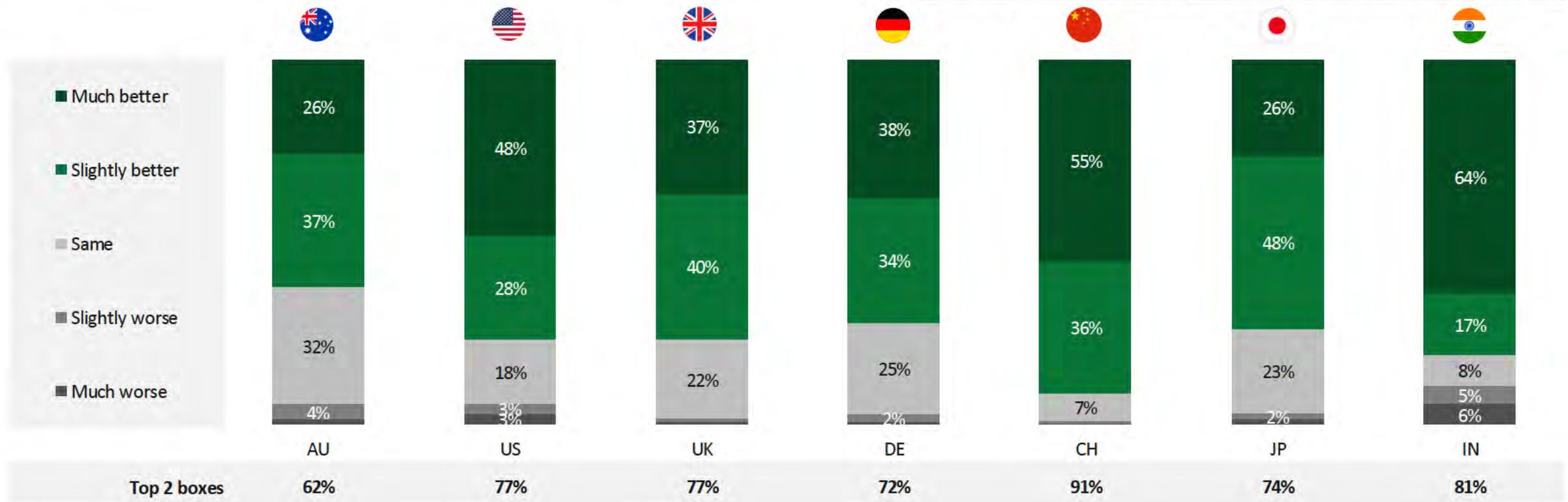
Agreement that the Masterplan gives visitors an opportunity to contribute to the preservation of Milford Sound / Piopiotahi



# The Masterplan does not have any negative impact on the opinion of New Zealand, and in fact, it enhances New Zealand's reputation among a significant portion of the target audiences

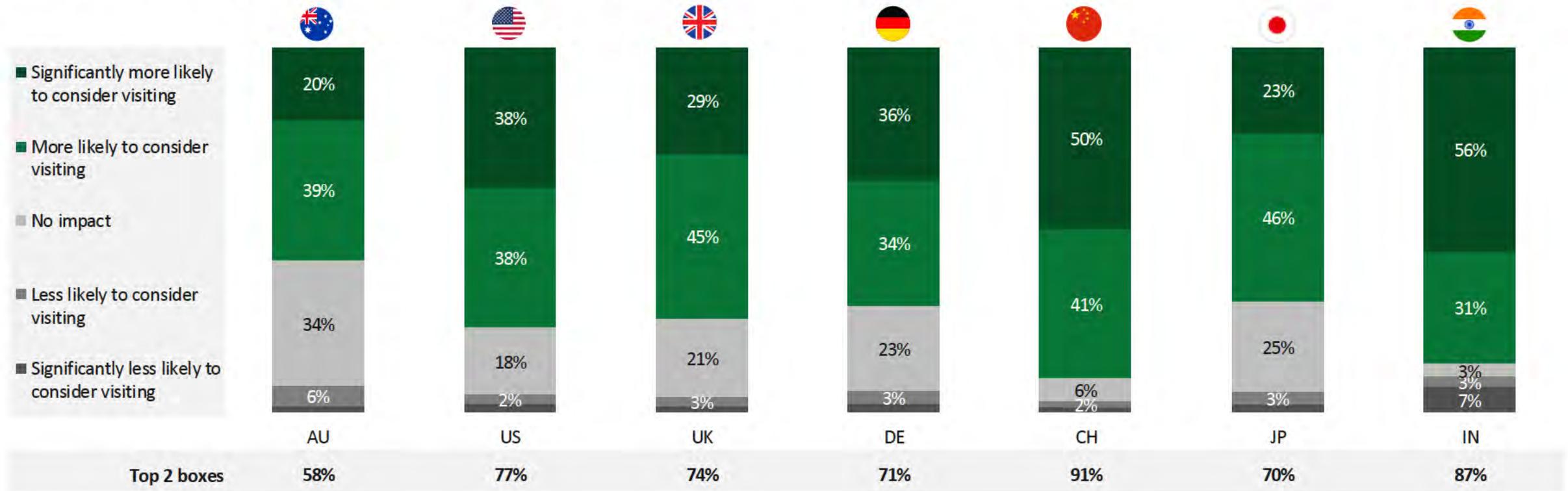
## Impact of the Masterplan on the overall opinion of New Zealand

India, and to some degree the US, are the only markets where we see some, but minimal, adverse impact of the plan on opinion of New Zealand



# The Masterplan doesn't deter potential visitors from wanting to experience Milford Sound / Piopiotahi, and in fact, it makes most of them more inclined to visit; only in India and Australia there is some, albeit minimal, negative impact

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



# Across all markets, one of the main concerns with the Masterplan is a risk of overdevelopment of the area, that could disrupt the feeling of tranquillity, remoteness and uniqueness of the place, and loss of more individual experiences

## Concerns the audiences have with the Masterplan

Compared to other markets, for the Indian audience there is a strong concern around loss of more personal or customised experience

	 AU	 US	 UK	 DE	 CH	 JP	 IN
I would want less development and infrastructure there – not more	33%	30%	33%	26%	43%	28%	30%
The number of tourists will not be reduced	26%	26%	31%	30%	35%	35%	38%
I would feel that my experience will be less customized to me now	19%	27%	17%	19%	30%	24%	55%
I may not be able to go to this place now	25%	19%	20%	20%	15%	13%	20%
We will lose what makes this place special	16%	17%	16%	23%	9%	16%	27%
I am not confident the environment will be restored	19%	15%	15%	20%	4%	7%	14%

Strongest concern    Weakest concern  
Heat map shading is across columns, i.e. compares within the market

# Despite some concerns, the Masterplan shows strong potential to enhance New Zealand's reputation in offering spectacular natural landscapes and scenery with unique National Parks

## Impact of the plan on perceptions of New Zealand

(% Strongly agree + agree with the statement after being taken through to the Masterplan and its ideas)

	 AU	 US	 UK	 DE	 CH	 JP	 IN
New Zealand offers spectacular natural landscapes and scenery	92%	91%	93%	86%	93%	84%	91%
New Zealand has remarkable and unique National Parks	89%	89%	91%	88%	89%	83%	89%
New Zealand offers a wide variety of tourist experiences	88%	87%	91%	87%	91%	78%	88%
New Zealand offers opportunities to explore local culture	87%	88%	91%	86%	89%	81%	87%
New Zealand is an ideal place to relax and refresh	86%	90%	86%	81%	92%	83%	90%
New Zealand has iconic attractions and landmarks	89%	88%	92%	85%	90%	78%	85%
New Zealand cares about enriching communities, landscapes and all who visit	81%	86%	89%	80%	91%	80%	87%
New Zealand is a destination where people have a special relationship with the land	81%	88%	88%	87%	88%	75%	86%
New Zealand offers experiences you can't get anywhere else	83%	86%	85%	84%	85%	79%	85%
New Zealand encourages sustainable practices and use of green technologies	73%	84%	86%	80%	90%	74%	86%
The environment of New Zealand is clean and unpolluted	80%	79%	83%	78%	89%	71%	88%
New Zealand is ideal for a family holiday	81%	81%	82%	63%	90%	75%	89%
It is easy to travel around to see and do things in New Zealand	73%	71%	70%	74%	85%	66%	83%
Things to see and do are affordable in New Zealand	63%	71%	61%	56%	80%	65%	83%

Weaker impact								Stronger impact
Heat map shading is across columns, i.e. compares within the market								

4

Evaluation of the  
propositions within  
the Masterplan

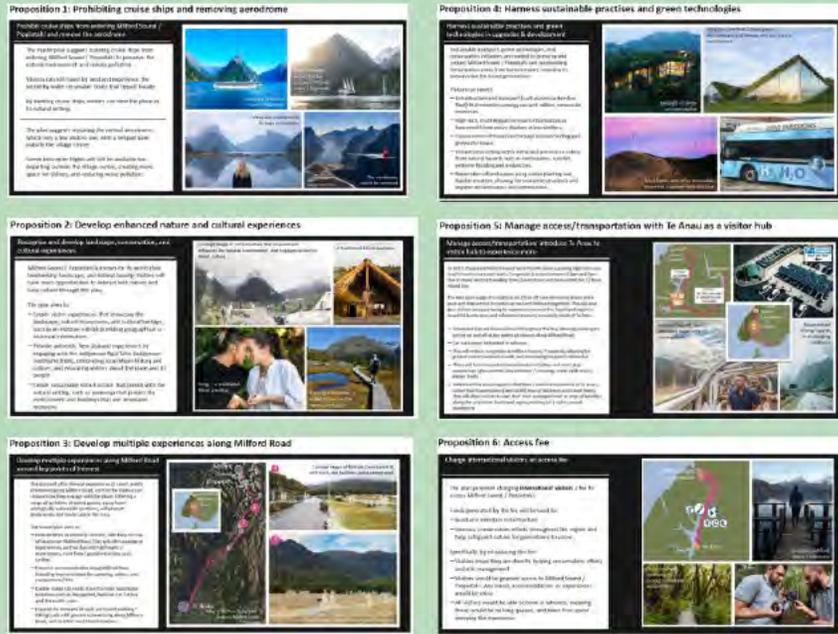


# Respondents were presented with 6 propositions and asked to provide feedback and evaluate them across the range of criteria

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

- Likeability
- Clarity in communicating its objective
- Impact on experience of 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 6 propositions and asked to evaluate them across the range of criteria. In qualitative groups, participants were introduced to all 6 concepts



# All propositions resonate well with the target audiences; naturally, the access fee is the least liked idea but still has the support of the majority of the target audiences

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

	 AU	 US	 UK	 DE	 CH	 JP	 IN	Average <sup>(1)</sup>
Develop enhanced nature and cultural experiences	81%	91%	94%	90%	95%	76%	97%	89%
Harness sustainable practices and green technologies	78%	89%	88%	88%	93%	84%	95%	88%
Develop multiple experiences along Milford Rd	80%	87%	86%	86%	92%	79%	96%	87%
Manage access/transportation with Te Anau as a visitor hub	79%	88%	86%	85%	94%	82%	94%	87%
Prohibiting cruise ships and removing the aerodrome	76%	86%	86%	91%	89%	79%	96%	86%
International visitors access fee	66%	84%	80%	80%	80%	73%	92%	79%



1. A simple average across markets, and does not take into account the size and potential of the market in terms of visitors. Reported here to provide an indicative overall view  
 Base: Shown on individual proposition slides  
 Q: How much do you like this idea?

## Proposition: Introduce an access fee

### Charge international visitors an access fee

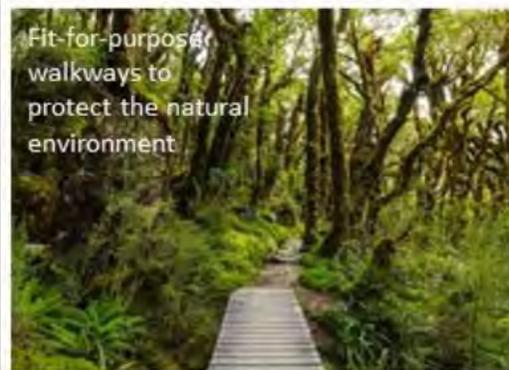
The plan proposes charging **international visitors** a fee to access Milford Sound / Piopiotahi.

Funds generated by the 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 fee:

- Visitors know they are directly helping conservation efforts and site management
- Visitors would be granted access to Milford Sound / Piopiotahi. Any travel, accommodation, or experiences would be extra
- All visitors would be able to book in advance, meaning there would be no long queues, and more time spent enjoying the experience



# Across all markets, the response to the access fee proposition is largely positive

## Performance scorecard: International visitors access fee

While the Australian market responded less positively than other markets, the proposition still resonates well with a significant portion of the target audience in that market

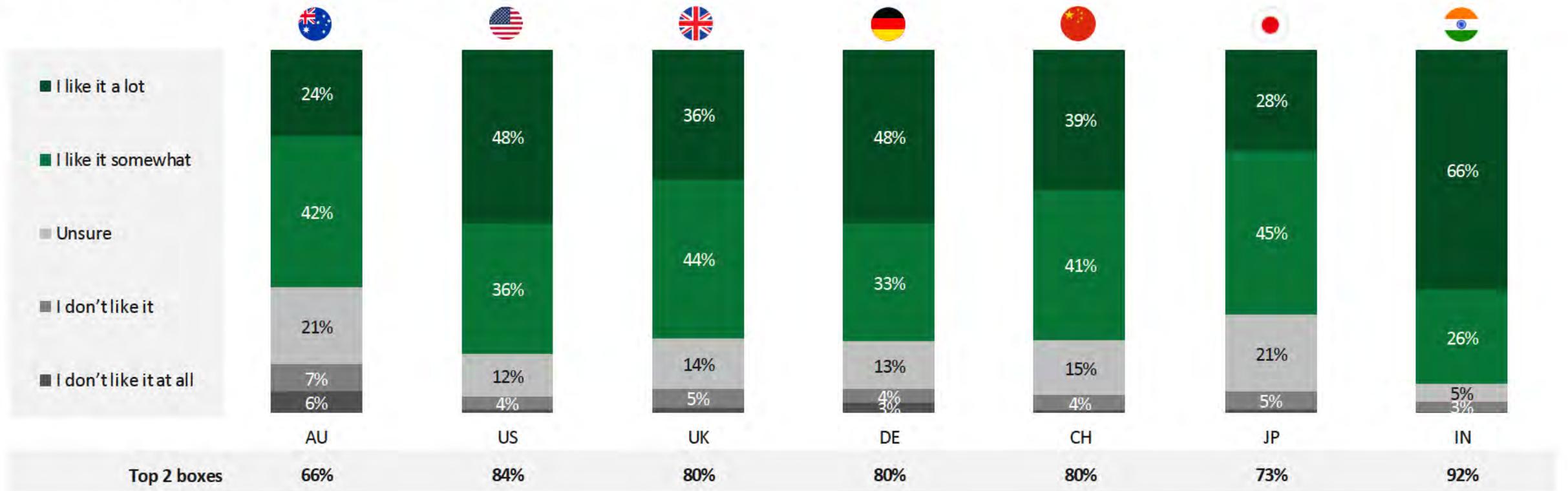


Base: n= AU 700; US 699; UK 701; DE 700; CH 678; JP 700; IN 698

1. A simple average across markets, and does not take into account the size and potential of the market in terms of visitors. Reported here to provide an indicative overall view
2. All metrics are on a 5 points scale from negative (1) to positive (5), with top 2 positive responses reported

When the access fee proposition and how the funds will be used are explained, the majority of the target audiences in all markets respond positively to the idea – there is very little animosity to it

Likability of the proposition: **International visitors access fee**



# Using the fee towards nature conservation and maintaining infrastructure in the area is what makes the visitor access fee appeal to the target audiences

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

### Nature conservation

- “By collecting an admission fee, it is possible to select tourists with a good customer base, which leads to nature conservation” (JP)
- “Contribute to nature conservation activities and maintenance of infrastructure” (JP)
- “Fee is used for nature conservation and preservation of the area” (DE)
- “I felt that it was good to be able to cooperate economically in nature conservation activities” (JP)

Strongest in JP

### Small tailored fee

- “A small fee to help the conservation is great as long as it’s affordable and not too much money” (UK)
- “A blanket fee on all visitors feels wrong. Disaggregated fee structures that reflect the mode of transport/ density would be better e.g. cyclists pay little, tour groups (who by density create most of the problem) pay the most” (AU)
- “To keep the land and cultural areas safe and protected from pollution or any other harm, I wouldn’t be opposed to paying a small fee to contribute to keeping the environment safe” (AU)

Strongest in AU

### Booking in advance

- “Booking in advance would allow staff to be more prepared for big crowds and fees are always necessary for all to enjoy and contribute responsibly” (US)
- “Booking the trip in advance and by paying a fee one is directly helping in conservation efforts” (IN)
- “You can expect high service by charging a fee. In addition, the reservation system seems to be meaningful because you can avoid waiting time and inefficient scenes” (JP)

### Infrastructure

- “I think it's natural that you have to pay an entrance fee, and just maintaining the facility is very expensive. Obviously the entrance fee is for infrastructure and conservation, and it's wonderful” (JP)
- “I like how the fees go to maintaining infrastructure and the upkeep of the park. The advance booking is a good idea to avoid queues” (AU)
- “It's a tricky one. Making the fee too big might discourage visitors but it's needed to help the conservation, infrastructure etc so I think it's about finding the right price to still attract visitors” (AU)



# International access fees are understood and expected by many, but in return there is an expectation of a higher standard of experience and less crowded spaces

- Visitors are generally **open to, and accepting to the idea of an access fee** at a National Park, or at high-profile destination. They often see it as an expected part of the experience – so most visitors were not surprised by this, and / or spontaneously suggested a fee prior to reviewing this proposition
- Paying for an experience can also make visitors cherish the experience more – by paying for it, they are deliberate in their choice, and take more care to be ‘in the moment, present and enjoy it’

## However...

- Visitors **expect the fee to upgrade and make the Milford Sound / Piopiotahi experience better** – they do not want a fee to be added with no obvious benefit for paying for the experience. Proof, and education of what the fee supports, can make visitors feel better about and justify paying
- Some visitors also **assume that if they need to pay to enter, there will be less visitors and crowds** at Milford Sound / Piopiotahi. This is based on previous experiences at other tourist destinations, where the fee has a dual purpose of limiting the number of visitors allowed to enter per day

## Qualitative insights for AU, US and CH

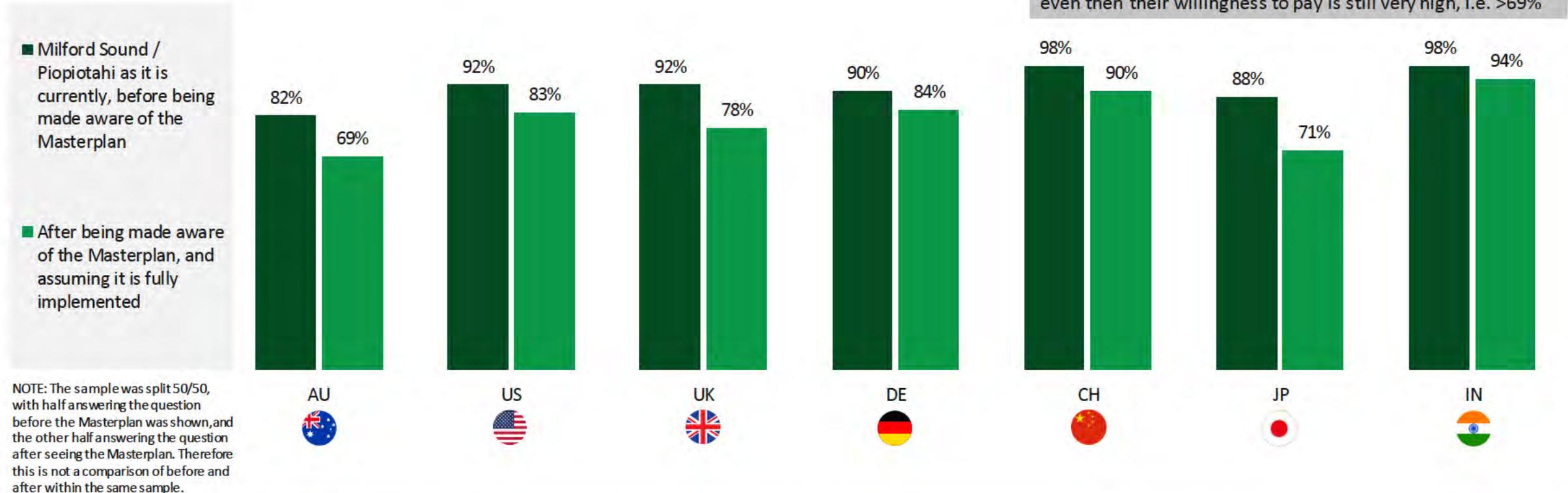
- *“This is not unusual we all get charged a fee for all our national parks in Australia so it's easily relatable – \$60 for an adult and \$30 for a kid or something like that.” – AU, AC, family*
- *“I tend to appreciate things more when I pay for it. So I might enjoy my Milford Sound / Piopiotahi experience more as a result.” – US, AC, family*
- *“I am less sensitive to cost when I am on holiday because I am paying for a better experience and I'm happy to pay to get less crowds.” – AU, AC, family*
- *“If I'm paying, I assume that there will be less lines and people, which will make the experience more enjoyable.” – US, AC, family*
- *“With the fee, I'd want to know exactly how long I can be there for, explanations of what I am looking at, rangers located around the park for safety, and nice visitor centres.” – US, AC, no kids*



# There is a high tolerance for paying a fee to visit Milford Sound / Piopiotahi regardless of whether the plan is fully implemented, but, the tolerance is lower when audiences are taken through the plan, indicating some tensions with the plan needing to be addressed

Willingness to pay fee to visit Milford Sound / Piopiotahi (% Yes, willing to pay)

Willingness to pay is softer among Australian, UK and Japan audiences who have been to New Zealand before, having experienced most of New Zealand free of charge. However, even then their willingness to pay is still very high, i.e. >69%



# This high tolerance for paying entry fees is potentially based on each market's National Park system where you are required to pay an entry fee, or their previous travel experiences

## Qualitative insights for AU, US and CH

The National Park systems in the USA, China and Australia require tourists to pay an entry fee to support the conservation of protected areas.

Many visitors have therefore come to expect to:

- Pay to enter (per car)
- Pay a per-day rate

In UNESCO World Heritage sights, the expectation to pay is heightened

However, paying for an experience means that visitors can have greater expectations for what that destination offers

## Example of entry fees charged by other prominent National Parks<sup>(1)</sup>

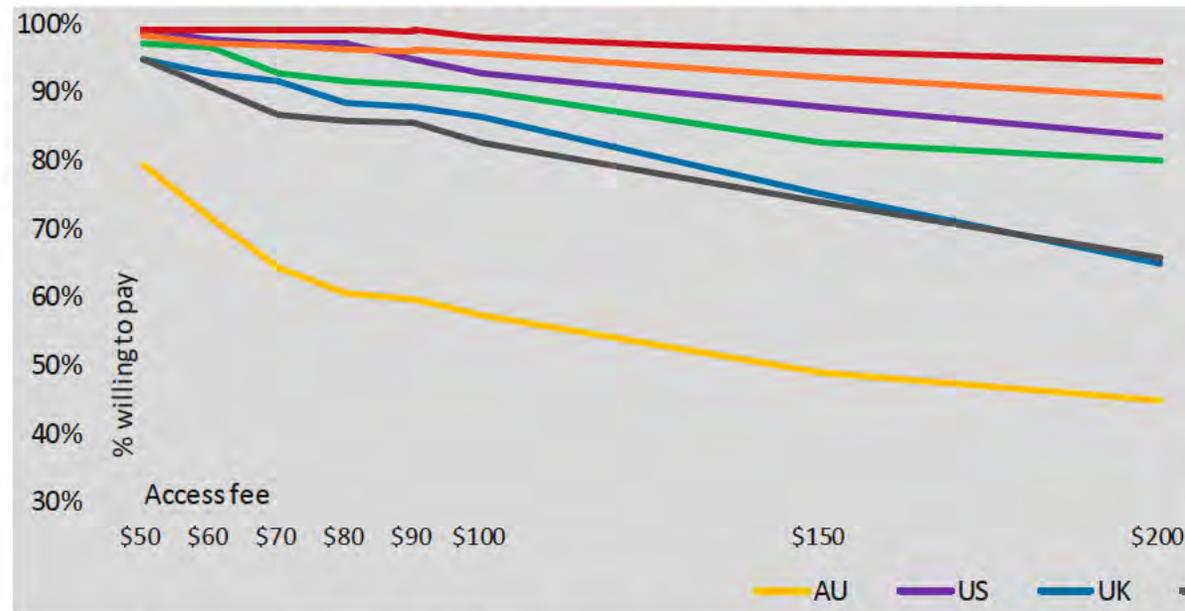
National park, country	Entry fee, per adult, NZD (except for US, which is specified below)
Banff National Park, Alberta, Canada	\$13
Serengeti National Park, Tanzania	\$113 (Peak season) \$97 (Low season)
Yosemite National Park, California, USA	\$24 (per person on foot, horseback, or bus, 7 day pass) \$49 (per motorcycle, 7 day pass) \$57 (per automobile, 7 day pass)
Kakadu National Park, Northern Territory, Australia	\$44 (7 day pass, Dry season) \$27 (7 day pass, Tropical summer)
Komodo National Park, Indonesia	\$16

**With the exception of Australia, willingness to pay to visit Milford Sound / Piopiotahi is at 80% for all markets within the price range of \$90-\$110; Australians, and to a much lesser degree Germans and Brits, are the most price sensitive**

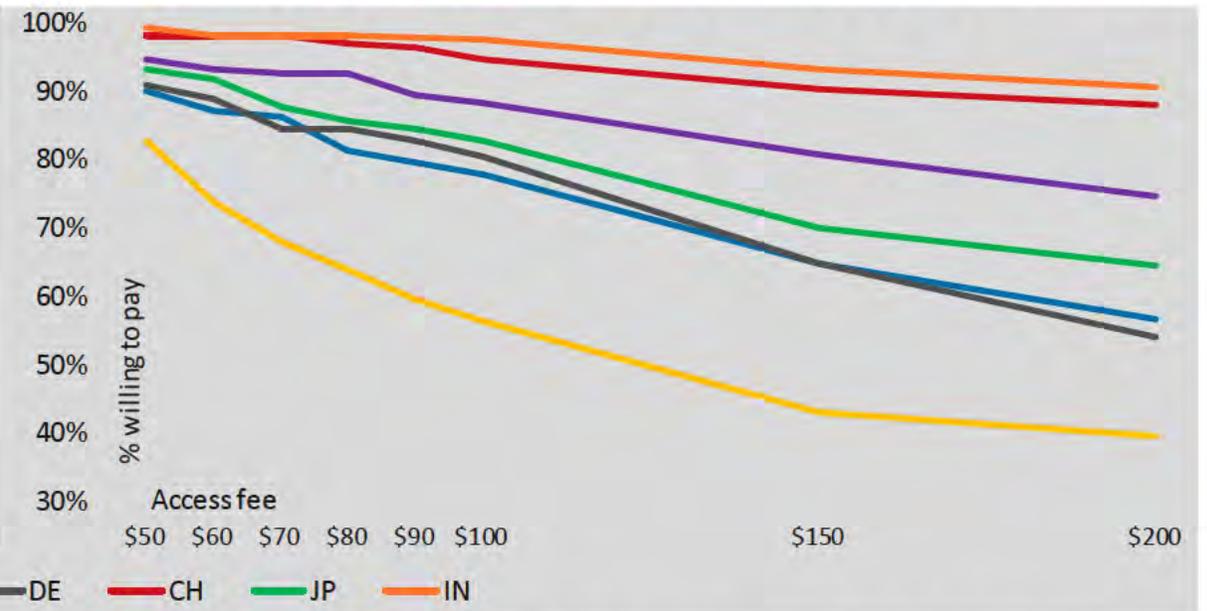
**Price willing to pay to visit Milford Sound / Piopiotahi (\$NZD, per person)**

NOTE: The sample was split 50/50, with half answering the question before the Masterplan was shown, and the other half answering the question after seeing the Masterplan. Therefore this is not a comparison of before and after within the same sample.

**Current experience, and before being made aware of the Masterplan**



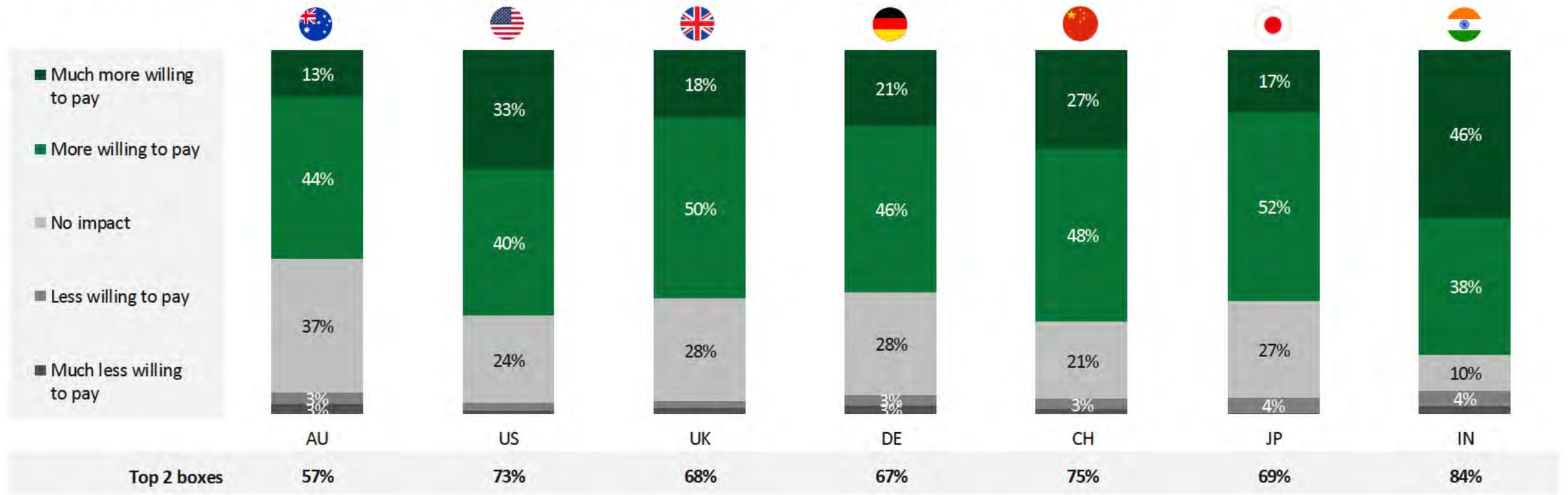
**After being made aware of the Masterplan, and assuming it is fully implemented**



- Australian past visitors to New Zealand tend to be less tolerant to fees than future visitors, possibly having experienced most of New Zealand for free. However, they still express strong willing to pay especially at lower fee points of \$50-\$60 NZD
- For other markets, the results are very similar between past visitors to New Zealand and future visitors, and in some instances like in the US and Germany, past visitors are willing to pay more, possibly having realised the value and experience they have had

# Communicating that the fee is being spent on conservation of the area has the potential to make the majority of visitors more comfortable and willing to pay the access fee

Willingness to pay to visit Milford Sound / Piopiotahi if it's explicitly clear that the fee is fully spent on preservation of the area



## Clear and transparent information regarding how the fee will be used and the benefits visitors will gain is needed to avoid some audiences feeling a sense of 'exploitation'

- Visitors want to know exactly how their fee is going to positively benefit the preservation and conservation of the environment, and sustainable infrastructure
- Transparency around this will be important, particularly to the Chinese market, who are concerned with the fairness of charging a fee to only international tourists
- Some visitors were also quick to calculate the income cost per year that Milford Sound / Piopiotahi would gain as a result of implementing a visitor fee – in doing this, they recognise that even for a small fee, the region would generate a large sum of money, which can lead visitors to scrutinise the usage of the fee
- With the fee, visitors would also want to know transparent information regarding how it impacts their experience at Milford Sound / Piopiotahi

### Qualitative insights for AU, US and CH

- *“Nature is free, so I feel a bit conflicted about charging for public land.” – AU AC, no kids*
- *“Tourists aren’t damaging the land as much as locals. It is their land, and they use it more.” – CH, AC, family*



## Visitors would also like to see a scaled pricing structure, to accommodate different visitor needs, life-stages, and ability to pay

- Australian visitors in particular mentioned that they would like to see a range of scaled fee options, to ensure that Milford Sound / Piopiotahi doesn't exclude certain visitor types – particularly backpackers, families, and seniors, who might be more price sensitive
- For other visitors, there can still be price sensitivities because travelling to New Zealand from afar is expensive, and all of the activities on offer add up quickly

### Qualitative insights for AU, US and CH

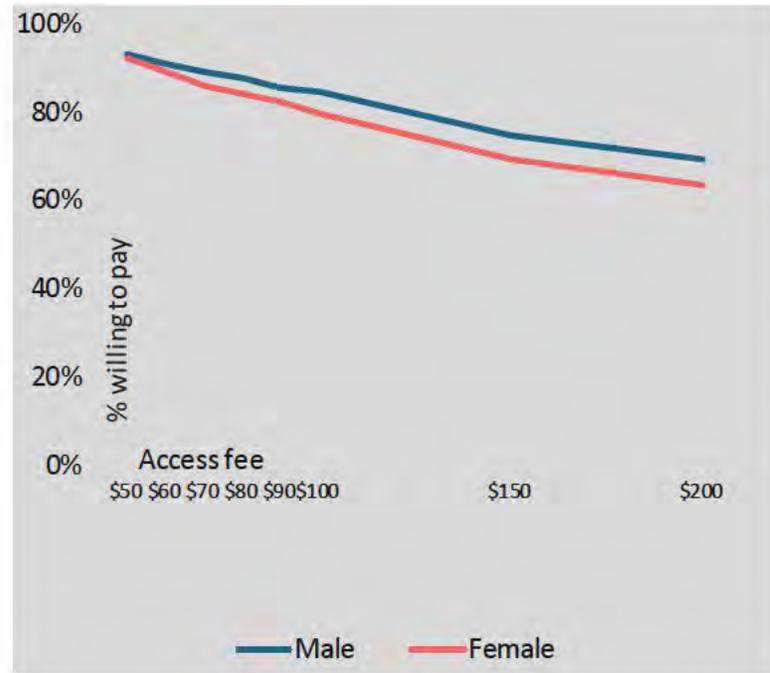
- *"It would be quite sad that backpackers wouldn't be able to go if their funds were tight. I do think it's a shame to cut people out because of financial reasons. Just because you're travelling doesn't mean you have all the money to spend on things. I'd like to think there is a way to offer concessions or smaller trips for visitors so that no one is completely excluded because of financial reasons."*  
– AU, AC, no kids
- *"It's important to have under 18's and over 65 for free, and for families, affordability is an issue."* – AU, AC, family



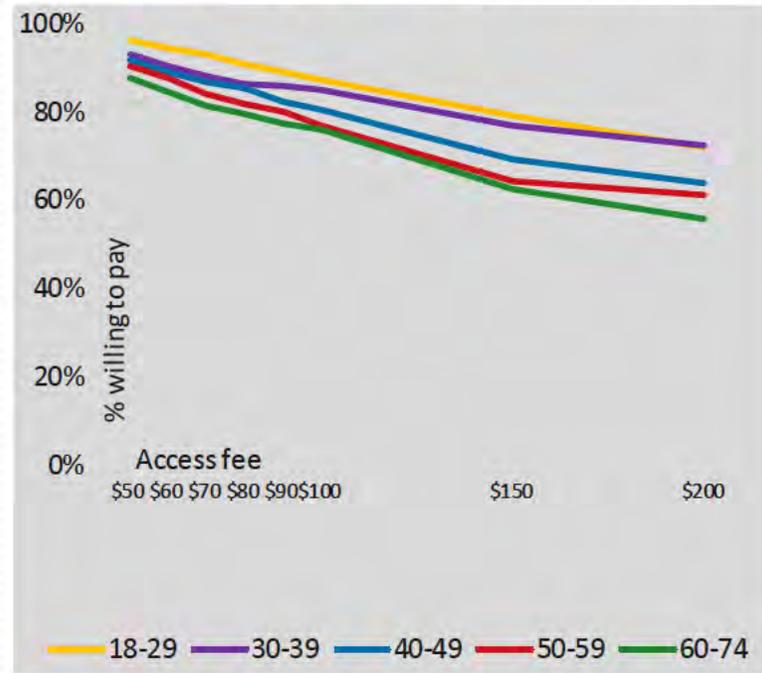
# While the majority is willing to pay a fee to visit Milford Sound / Piopiotahi, higher tolerance to a fee is seen among 18-29 and families and less tolerance among age 60+

## Price willing to pay to visit Milford Sound / Piopiotahi after being made aware of the Masterplan, and assuming it is fully implemented (\$NZD, per person), Markets combined total<sup>(1)</sup>

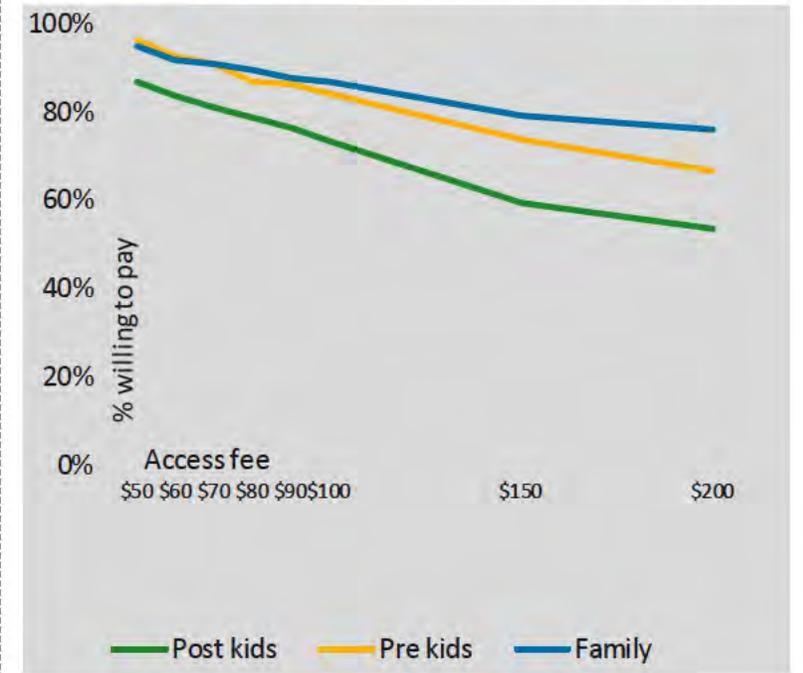
### Gender



### Age

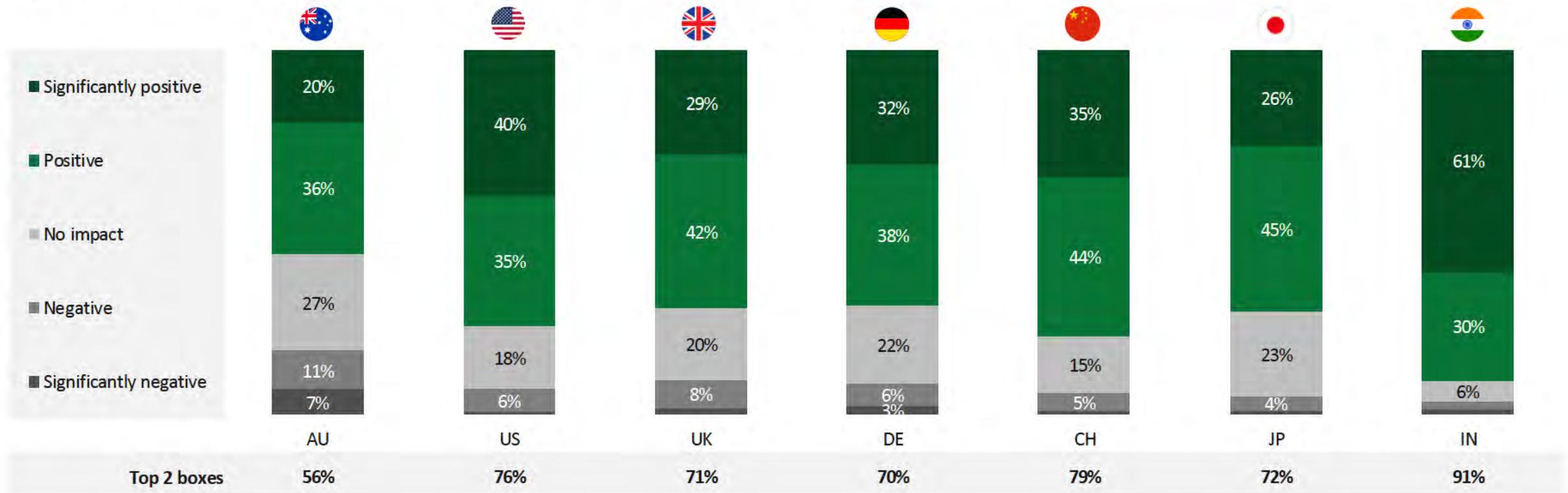


### Life stage



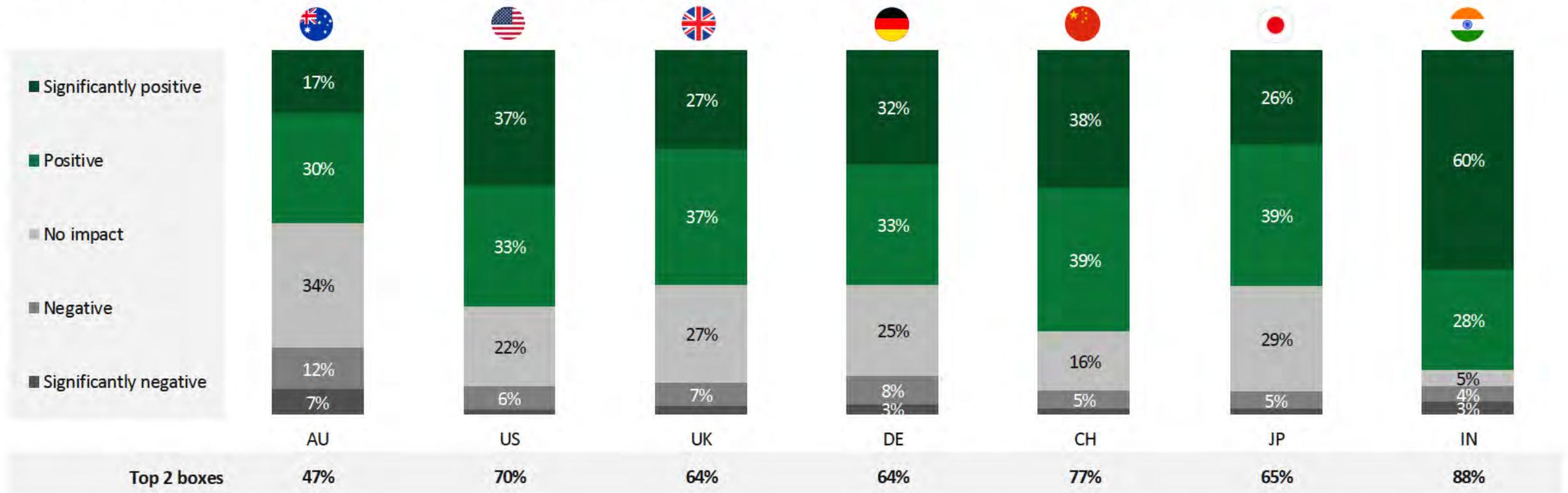
Knowing that the funds will be used for conservation and infrastructure, the majority of the target audiences expect that it will improve their visitor experience; there are some, albeit small, negative reactions among the Australian audiences

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



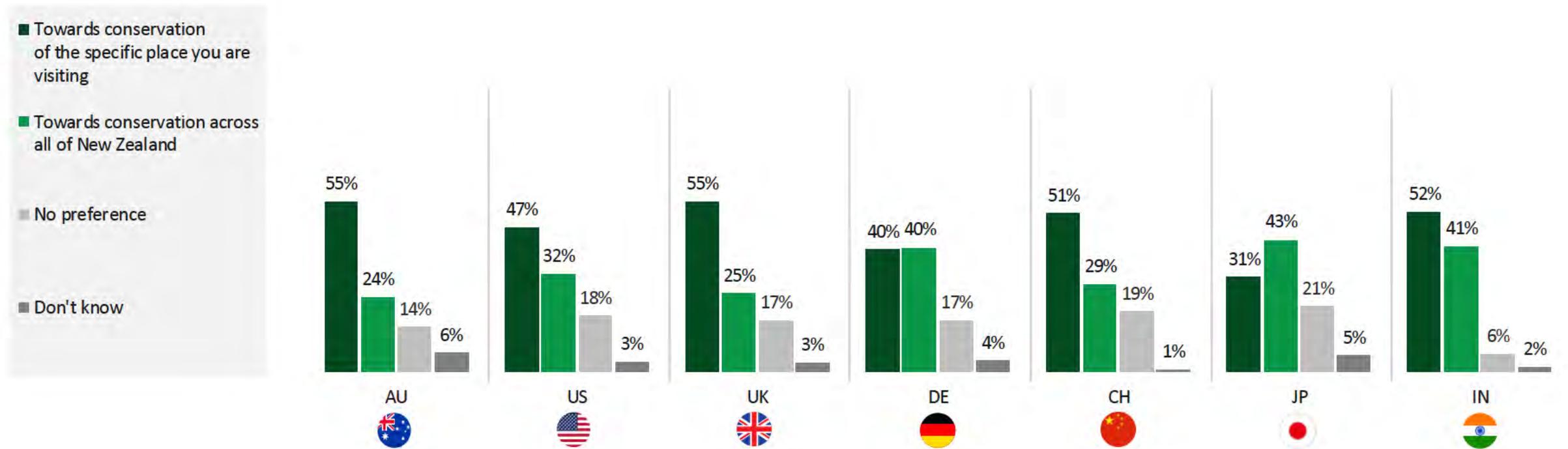
Knowing that the funds will be used for conservation and infrastructure, the majority of the target audiences agree that it will improve their consideration to visit Milford Sound / Piopiotahi; there are some, albeit small, negative reactions among the Australian audiences

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



# With the exception of Japan, preference among the target audiences is for the Milford Sound / Piopiotahi access fee to fund conservation in the area rather than across all of New Zealand

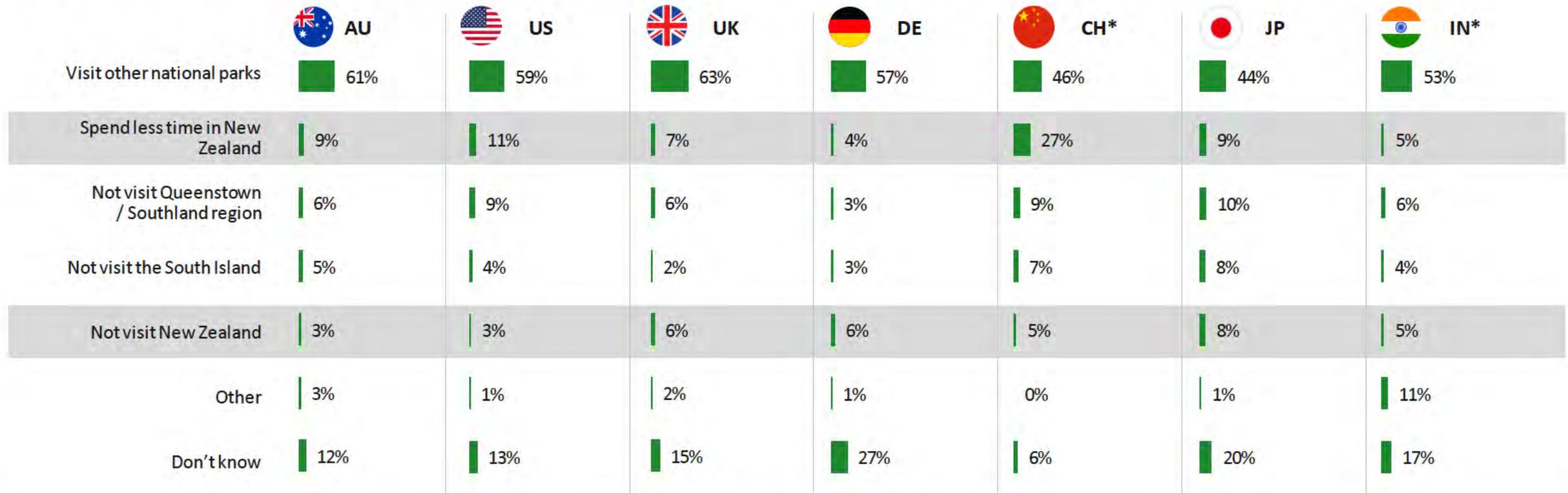
Preference for how the funds generated through an access fee should be spent (% willing to pay access fee)



# There is little risk in deterring visitors from New Zealand if the access fee was introduced – most price-sensitive visitors would simply visit another national park if they did not want to pay a visitor fee; although some might choose to spend less time in New Zealand

**\*CAUTION: SMALL SAMPLE SIZES FOR CH AND IN**

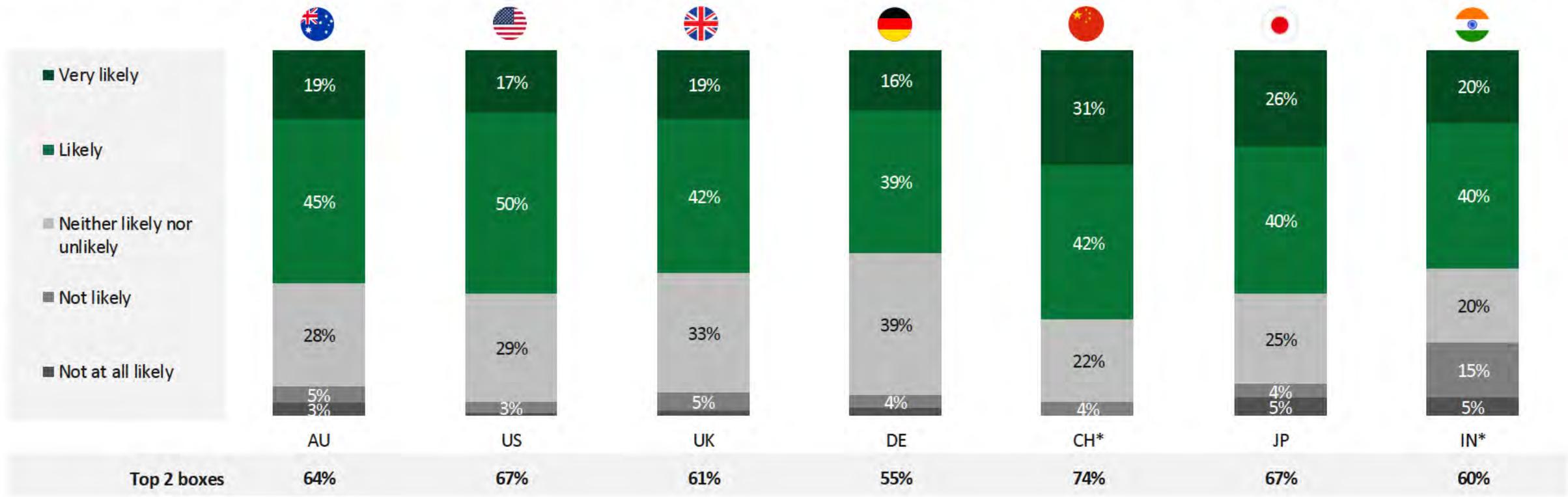
Risks – what are you likely to do if you did not want to pay the fee to visit Milford Sound (among those not willing to pay more than \$100)



# More specifically, most price sensitive visitors would opt to visit another fiord without a fee if they didn't want to pay to visit Milford Sound / Piopiotahi – thus, the visitor fee could facilitate visitor dispersal but also potentially increase crowding in other parks

**\*CAUTION: SMALL SAMPLE SIZES FOR CH AND IN**

Likelihood to visit a different fiord without a fee if had to pay to visit Milford Sound / Piopiotahi (among those not willing to pay more than \$100)



## There is a perception that New Zealand is ‘full of places like Milford Sound / Piopiotahi’ – which may contribute to respondents considering alternative fiords or National Parks, if there was a fee

### Qualitative insights for AU, US and CH

- In the qualitative focus groups, most respondents viewed an entry fee to Milford Sound / Piopiotahi to be reasonable and expected. This was particularly true in Australian and American discussions
- However, there was a clear sentiment that New Zealand as a whole is a beautiful country with stunning landscapes throughout. Therefore, some visitors may not place a strong value on experiencing Milford Sound / Piopiotahi, in particular
- Educating visitors on Milford Sound / Piopiotahi’s unique experience, and transparency surrounding how the fee will be used, could support people in choosing Milford Sound / Piopiotahi over other fiords or National Parks



## Proposition: Prohibiting cruise ships and removing the aerodrome

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

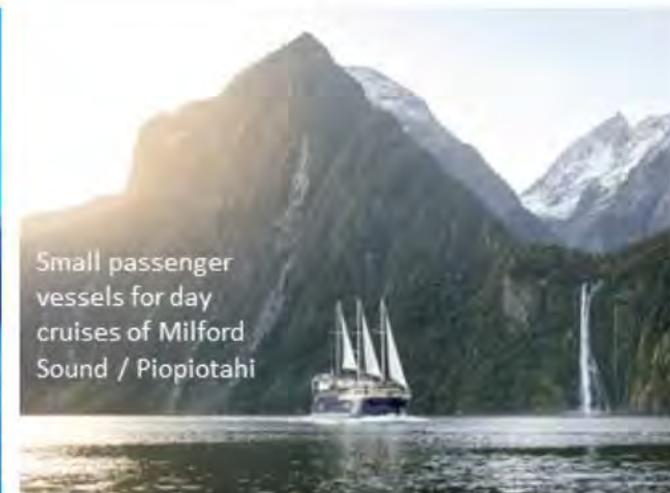
The masterplan suggests banning cruise ships from entering Milford Sound / Piopiotahi to preserve the natural environment and reduce pollution.

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 plan suggests replacing the central aerodrome, which only a few visitors use, with a helipad base outside the village centre.

Scenic helicopter flights will still be available but departing outside the village centre, creating more space for visitors, and reducing noise pollution.



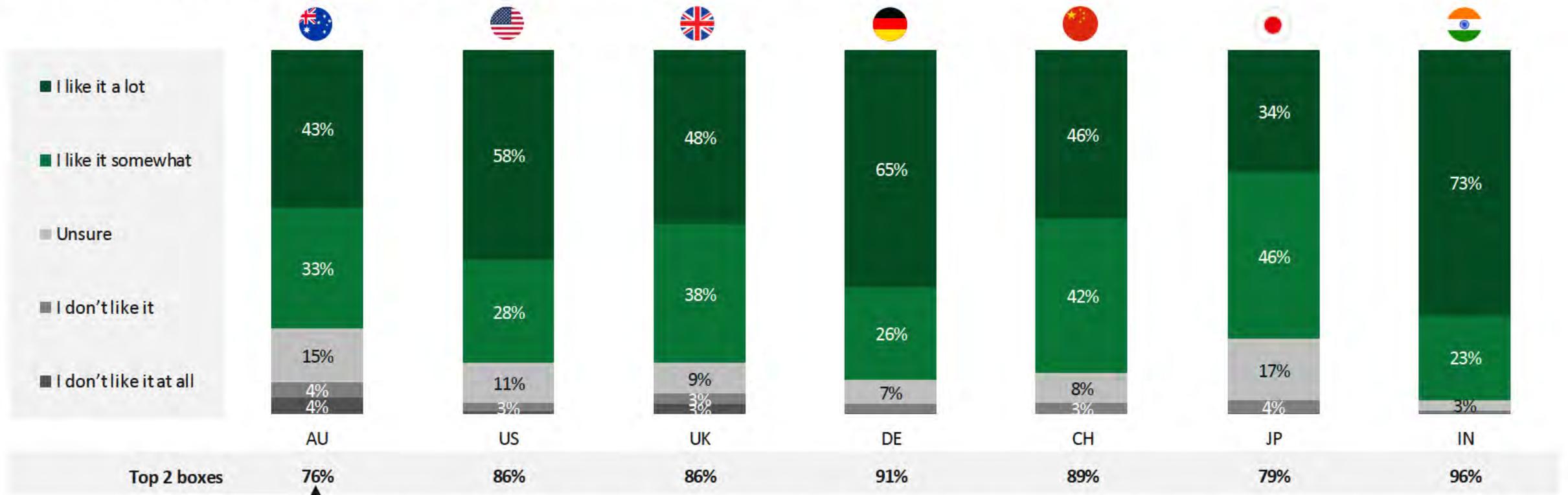
# The proposed changes to cruise and air access to Milford Sound / Piopiotahi are well received across all markets

## Performance scorecard: Prohibiting cruise ships and removing the aerodrome



# The immediate reactions to the proposed changes to access to Milford Sound / Piopiotahi by cruise and air are largely positive across all markets

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



The likeability of the proposition among the AU past visitors to New Zealand is softer, yet very positive (69% vs. 85% for ACs who have not yet been to New Zealand)

# The proposition to prohibit cruise ships gets support due to its intent to preserve the pristine environment in the area

## What is liked about the proposition: Prohibiting cruise ships and removing the aerodrome

The protection of nature is well received	Reducing the environmental impact	World-class visitor experience	Conservation
<ul style="list-style-type: none"> <li>— “Yes. Very true by banning cruise ship it will preserve the natural environment and reduce the pollution and visitors can view the place in natural setting” (AU)</li> <li>— “There is no need for a big cruise ship to get that close” (US)</li> <li>— “Ban large cruise ships to protect the environment better” (CH)</li> <li>— “Ban cruises. They destroy scenery and wildlife. Small boats are good enough” (UK)</li> </ul>	<ul style="list-style-type: none"> <li>— “By banning large cruise ships, visitors can better see the fiord in its natural environment” (CH)</li> <li>— “Environmental concerns of cruise ships and other tourist activities on the delicate ecosystem of Milford Sound” (UK)</li> <li>— “Environmental protection is paramount” (DE)</li> </ul>	<ul style="list-style-type: none"> <li>— “Boat carbon emission is a big factor when creating pollution. Adding an alternative way to visit Milford Sound/ Piopiotahi makes it more admirable” (AU)</li> <li>— “Create more space for visitors and reduce noise pollution” (CH)</li> <li>— “I like that it's keep cruise ships away not only does it keep more pollution away but it keeps the area much more quieter and courteous for visitors” (US)</li> </ul>	<ul style="list-style-type: none"> <li>— “You can see beautiful nature” (JP)</li> <li>— “This view is very beautiful, sitting on the sea shore, pure environment, you have got all the happiness of human life” (IN)</li> <li>— “This is because the beautiful scenery of nature is fully incorporated”(JP)</li> </ul>
	<p style="text-align: center;"><b>Strongest in CH</b></p>	<p style="text-align: center;"><b>Strongest in CH</b></p>	



## Prohibiting large cruise ships is a particularly favourable proposition, as many visitors see cruise ships contradicting the pristine natural environment

- With Milford Sound / Piopiotahi's appeal and attraction grounded in the raw natural beauty and environment, visually and mentally, cruise ships are at odds with the scenic experience visitors are looking for
- **Visually, obstructing** Mitre Peak and the surrounding Sound was unappealing. Visitors also worry that cruise ship tourists could disembark at Milford Sound / Piopiotahi, creating **over-crowding**
- Mentally, visitors associate cruise ships with **environmental pollution**, and worry that there is a risk to Milford Sound / Piopiotahi's delicate environment
- While there is clear preference in removing large cruise ships from Milford Sound / Piopiotahi, visitors would want to know smaller day-cruises are not negatively impacting the environment, and would expect caps on the number of visitors able to day-cruise, per day, as visitors worry about too many small boats as well

### Qualitative insights for AU, US and CH

- *"The fact that there are big cruise ships in Milford Sound already, is a **natural disaster waiting to happen.**"*  
— US, AC, no kids
- *"A cruise ship would just be a big **eye sore.**"*  
— US, AC, no kids
- *"I've experienced Milford Sound via a cruise ship, and cruise ships shouldn't be in Milford Sound. I'm sure people would be disappointed by this, but if you really want to see Milford Sound / Piopiotahi, you'll make it happen another way. It is **too damaging to the environment.**"*  
— AU, previous visitor



## Qualitatively, removing the aerodrome was less preferred, with some visitors wondering if there is a safety risk, and questioning if helicopters can do more damage to the environment

- **Safety risk** – small planes can carry more people to rescue than a helicopter
- **Environmental damage** – helicopters are not seen to be particularly environmentally-friendly, with people questioning the carbon pollution, as well as the noise pollution
- Some people also still expected the ability to fly into Milford Sound / Piopiotahi on scenic flights, and worried that removing the aerodrome would mean this isn't an option anymore
- There was an evident desire to keep access to a plane – however, people wondered if a water plane could be an alternative, enabling the aerodrome to be removed and repurposed, while retaining the plane experience
- Carbon emissions would remain a key consideration however, and visitors do not have much sense of which mode of transport is best for the environment

### Qualitative insights for AU, US and CH

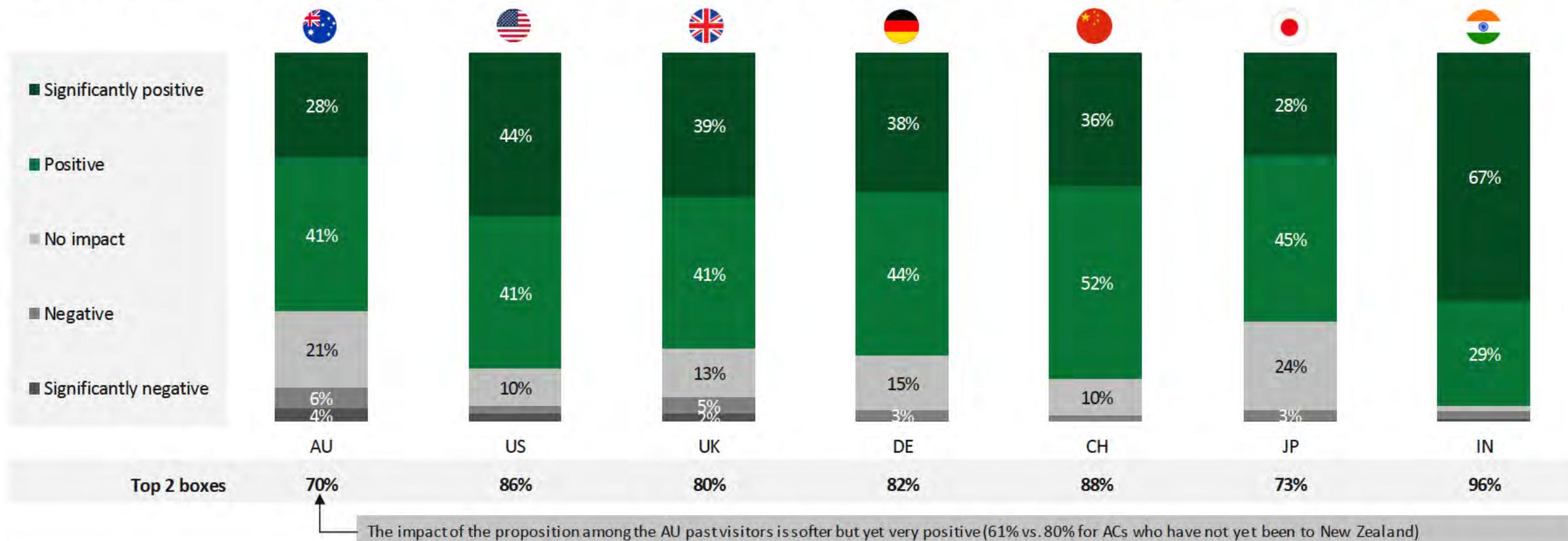
“A helipad is an acceptable compromise, but it would have to be a sustainable low emissions helicopter, and the noise pollution of helicopters is pretty strong with a local impact upon fauna. It is not peaceful or tranquil at all, and if there are so few people interested in landing at Milford Sound / Piopiotahi, why replace it at all?”

– Australia, AC, family



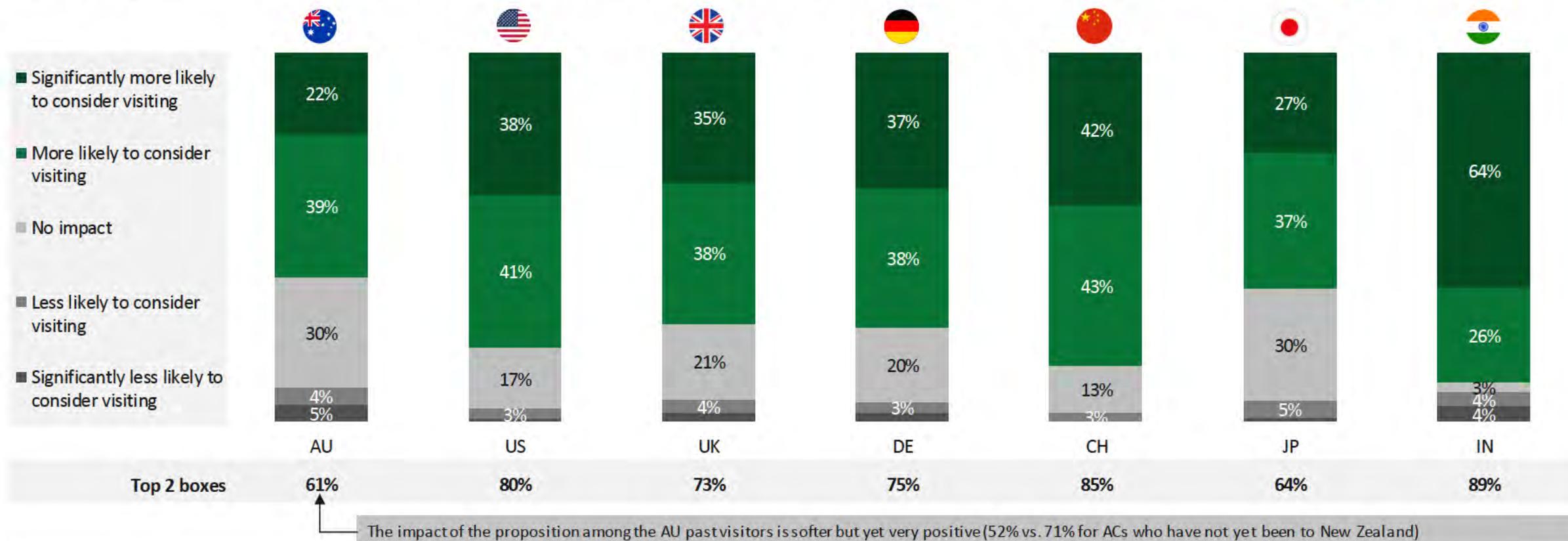
# The proposed changes to cruise and air access to the area are expected to improve the visitor experience; only in Australia there is some expected negative impact, but it is minimal

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



# The proposed changes to cruise and air access to the area are unlikely to have a significant adverse impact on consideration to visit Milford Sound / Piopiotahi

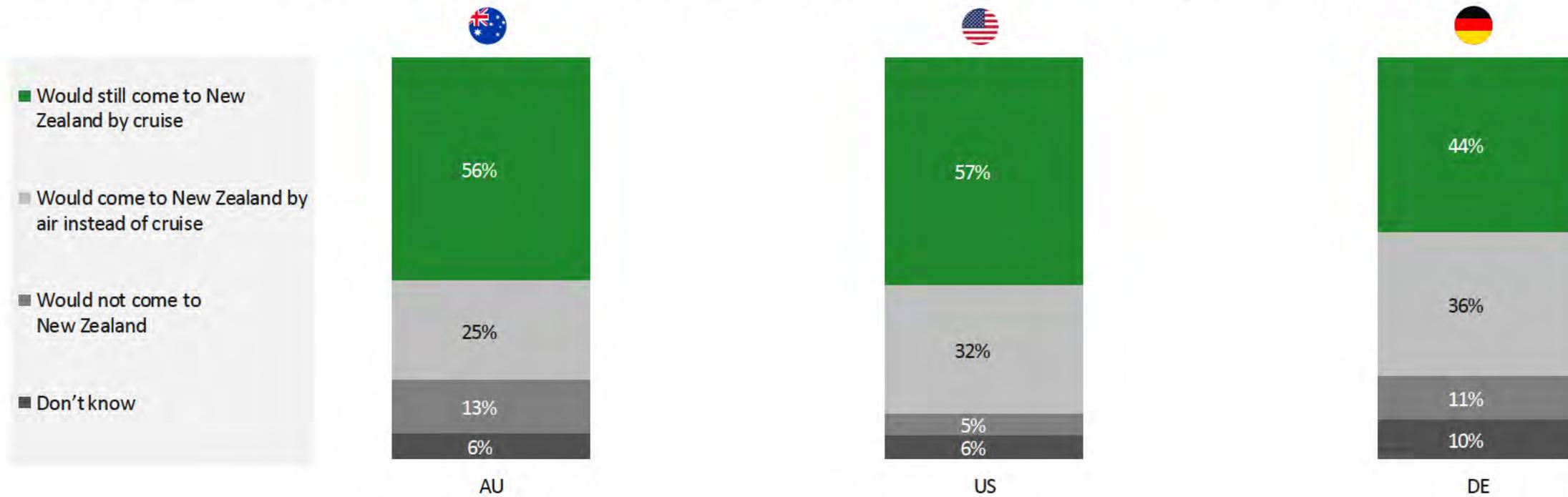
Impact the proposition might have on consideration to visit Milford Sound / Piopiotahi: **Prohibiting cruise ships and removing the aerodrome**



# Among visitors who are considering coming to New Zealand by cruise, the vast majority would not be deterred by the proposed cruise access changes to Milford Sound / Piopiotahi – however, there is some small risk with the Australian and German visitors

CAUTION: SMALL SAMPLE SIZES

Impact the proposition might have on consideration to come to New Zealand among those who are planning to come via cruise



Sample size too small to report results for in other markets

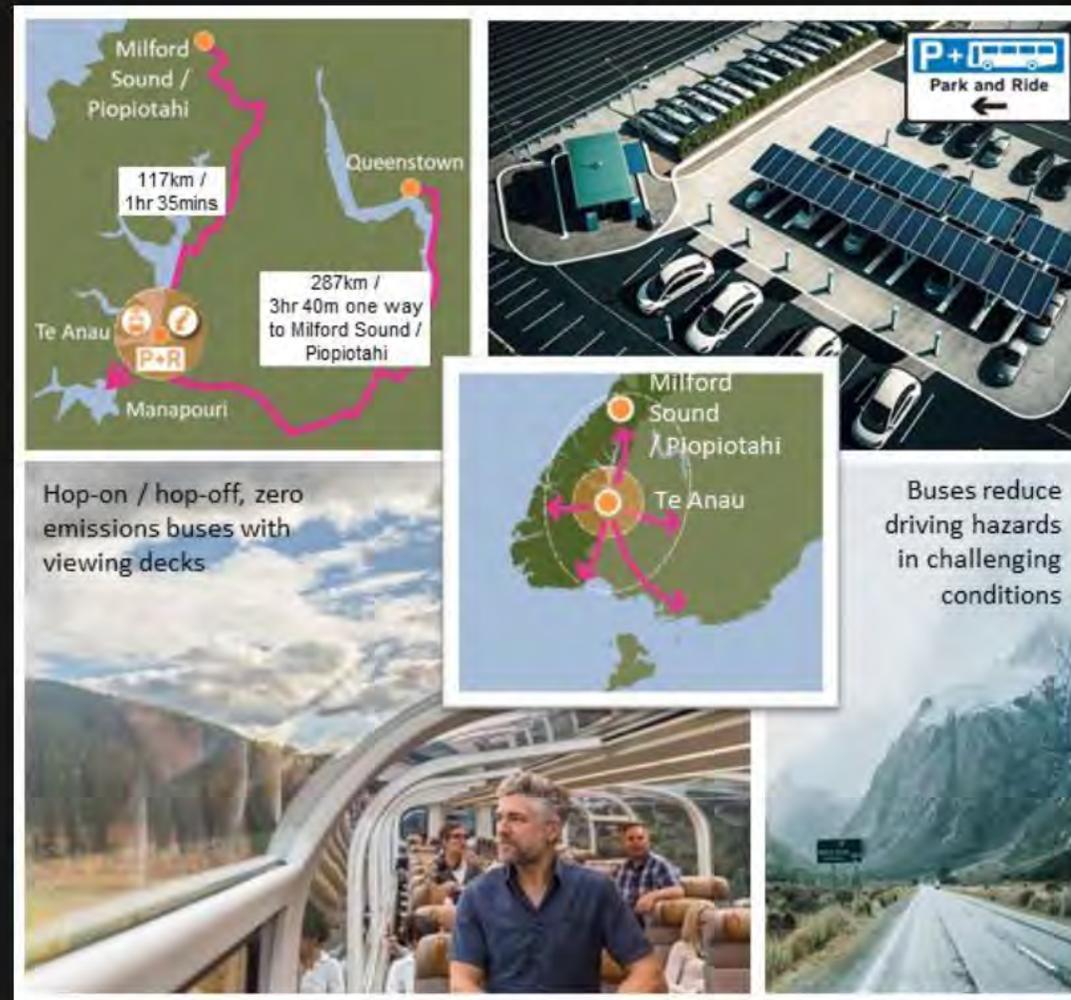
## Proposition: Manage access / transportation with Te Anau as a visitor hub

### Manage access / transportation with Te Anau as a visitor hub

In 2019, Piopiotahi Milford Sound 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 the 12 hour round trip.

The new plan suggests using hop-on / hop-off zero-emissions buses and a park and ride service 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.
- Car parks must be booked in advance.
- 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



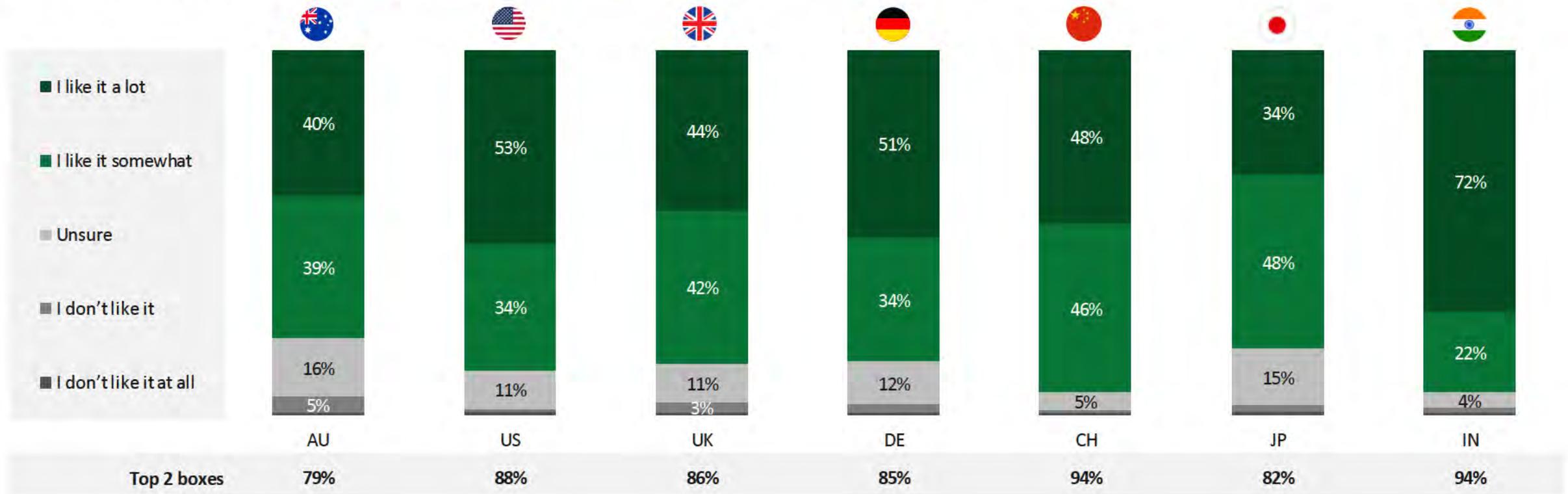
# The proposed changes to access and transportation between Te Anau and Milford Sound / Piopiotahi are well received across all markets

## Performance scorecard: Manage access / transportation with Te Anau as a visitor hub



# Largely, the target audiences across all markets like the idea of having managed transportation options when visiting Milford Sound / Piopiotahi

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



# The proposition receives support due to its intention to reduce congestion in the area, and thus, improve the visitor experience



## What was liked about the proposition: Manage access / transportation with Te Anau as a visitor hub

### Buses

- *“Controlled transportation, by using scheduled hop on and off busses has to be the way to go in future for many tourist attractions around the world rather than the gridlocks and carnage caused by individual vehicles” (UK)*
- *“Hop on and off buses so I don't have to drive and have more time to enjoy Milford sound” (AU)*
- *“Taking care of the environment with zero emission buses” (US)*

Strongest in AU and US

### Reducing traffic and congestion

- *“Plans to reduce congestion will make it more appealing to visit the area” (US)*
- *“Enhancing tourism by alleviating traffic congestion” (JP)*
- *“The idea of how the region plans to curb traffic congestion while still creating opportunities for tourists to enjoy more scenic attractions without putting too much strain on the natural landscape” (DE)*
- *“It reduces congestion for locals who actually need to use the road” (AU)*
- *“It would reduce congestion and make the area more attractive to visitors to enjoy the natural surroundings” (AU)*

Strongest in AU and DE

### Visitor experience

- *“A novel tour experience, more rich and interesting” (CH)*
- *“Attempting to improve visitor experience” (AU)*
- *“It will give good experience of Southland region beautiful landscapes and wildernesses tourism, especially south of Te Anau” (IN)*

Strongest in CH

## Specifically, the idea of hop-on / hop-off buses is positively viewed for their ease of use, ability to enable a different experience, and the benefit to the environment

- Visitors see an **environmental benefit in the low / zero emission buses**, and think they make sense for the region, given the delicate nature of Milford Sound / Piopiotahi
- Parking at Te Anau was also not seen as an issue, and the hop-on / hop-off experience was generally imagined to be **easy**. For some visitors, hop-on / hop-off, also **alleviated concerns of driving** along the Milford corridor

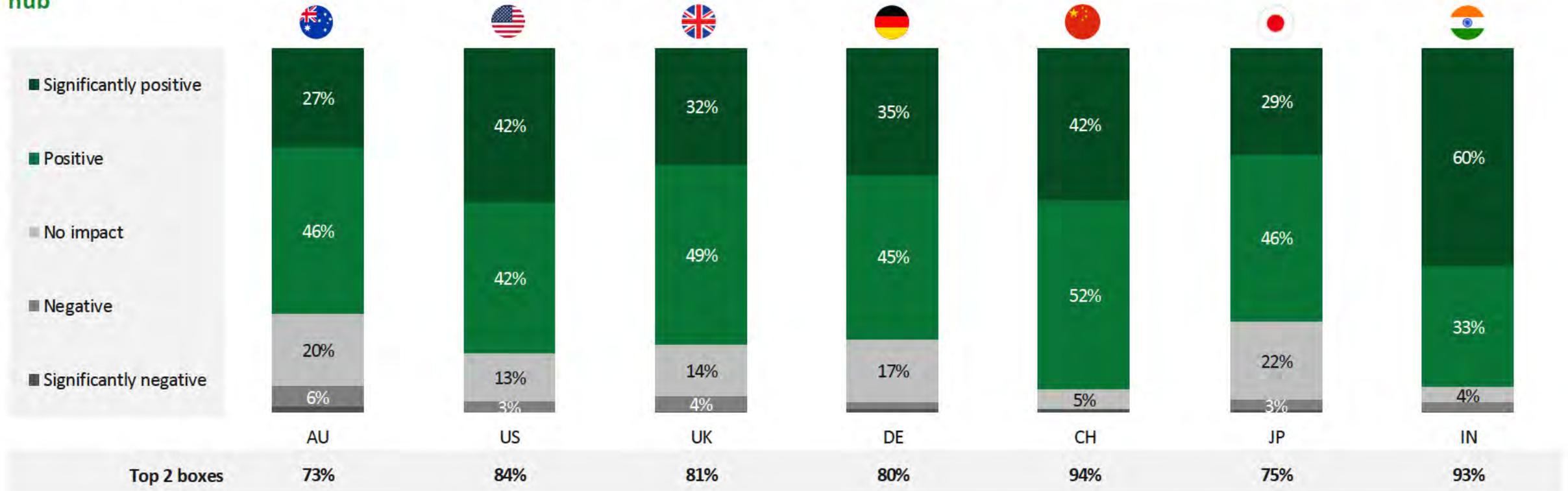
### Qualitative insights for AU, US and CH

- *"I'd park my car in Te Anau, and the bus seems to be double-decker, which allows for better scenery viewing than driving myself; it feels like a different experience, as I can't fully enjoy the scenery while driving."*  
— CH, AC, no kids
- *"I love the idea of the hop on hop off buses, the hybrid or low emissions is great."*  
— AU, previous visitor



# The proposed changes to access and transportation to Milford Sound / Piopiotahi along the Milford corridor are largely seen to improve the visitor experience

Impact the proposition might have on visitor experience at Milford Sound / Piopiotahi: **Manage access / transportation with Te Anau as a visitor hub**



# There is a concern around a loss of authenticity and freedom that comes with experiencing Milford Sound / Piopiotahi, and that buses signal ‘commercial, packaged, and impersonal’

- Buses can make visitors feel that they are on a tour, and that they are forced to share their experience with others. A level of standardisation can be felt, with **visitors worrying that their experience will become akin to a packaged tour – which can feel commercial, and impersonal**
- While enabling flexibility to see more of the Milford corridor, some visitors perceive hop-on / hop-off buses to increase pressure to rush the experience, or do it all
- Visitors are looking for guidance on which activities they should prioritise, and how they can make the most of Milford Sound / Piopiotahi, based on their needs and interests
- Visitors also want to know that the buses will come at an appropriate cadence (ideally, every 30 minutes) to enable them to move through the corridor at pace if desired
- This was particularly felt by Australian visitors

## Qualitative insights for AU, US and CH

“The idea of it being a tour, and you’re doing it with heaps and heaps of people takes away from the idea of tranquil.” – AU, AC, no kids

“This would work for a lot of people, they would find it is a really easy way to see what they want to see, the ethical way to view the area. But a lot of people like the idea of exploration, doing things on their own time.” – AU, previous visitor

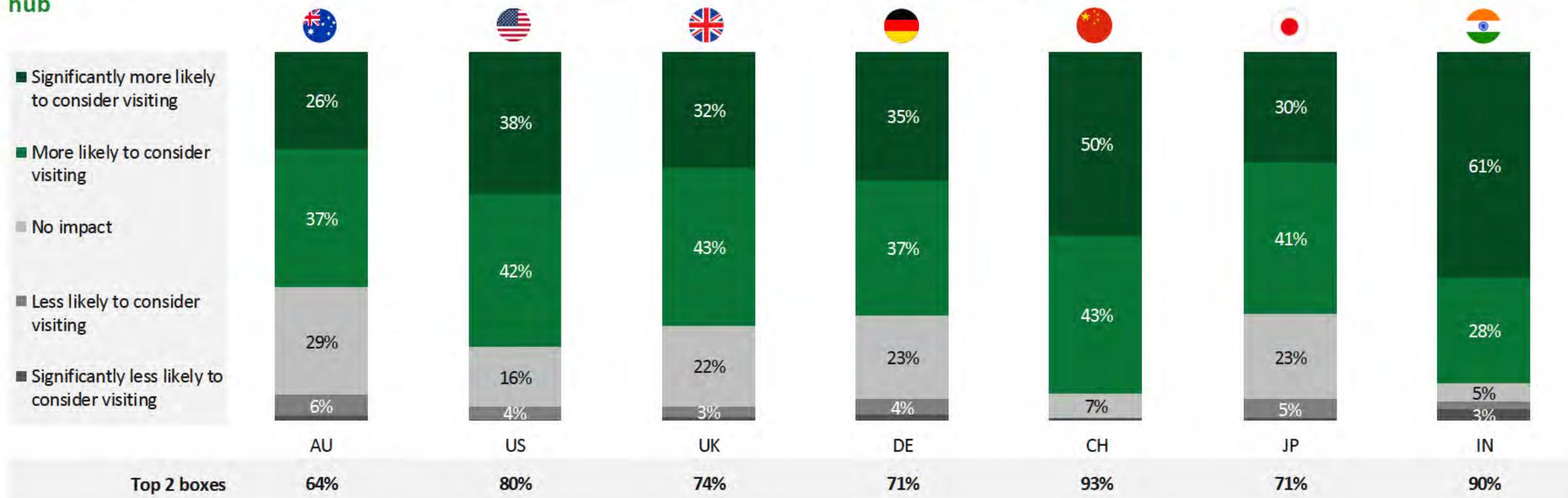
“A lot of people who are travelling to these areas have that sense of adventure – and feel like they are discovering something themselves. It starts the experience off cutting that out. Makes it feel like a little commercial.” – AU, AC, no kids

“It’s all about the balance, you don’t want to make it feel like it’s a really impersonal experience – that you’ve gone all this way to discover the natural beauty only to be confounded by tourist buses that are smelly, noisy and full of people. It’s the balance between authentic experiences and finding ways to conserve these places.”  
– AU, AC, no kids



# The proposed changes to access and transportation to Milford Sound / Piopiotahi show a strong potential to improve consideration to visit the fiord

Impact the proposition might have on consideration to visit Milford Sound / Piopiotahi: **Manage access / transportation with Te Anau as a visitor hub**



## Further, visitors expressed minimal concern with starting their Milford Sound / Piopiotahi experience in Te Anau – however, it does set their expectation high regarding accommodation and activity offerings

Qualitative insights for AU, US and CH

- Visitors understand that starting their Milford Sound / Piopiotahi experience in Te Anau enables them to benefit from a shorter drive to the fiord, and a full-day excursion (when compared to starting in Queenstown)
- However, **visitors wanted reassurance that Te Anau offers suitable accommodation**, including a range of accommodation types for a range of budgets
- People also wanted to know what other activities are on offer in Te Anau, or if Milford Sound / Piopiotahi is the primary activity
- With Queenstown well known for being a tourist hub and destination, there is some concern that starting in Te Anau means that people will have less time in Queenstown. This was heightened amongst Americans who typically have less annual leave, compared to other visitor
- Australians recognise that they can always come back to New Zealand for a visit, therefore they are less concerned about length spent in Queenstown, and see the gateway to Southland to be beneficial
- Chinese visitors see Te Anau to be another attraction on their itinerary, and therefore were not discouraged by less time in Queenstown

## 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 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 the indigenous Ngāi Tahu (indigenous Southland tribe), 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



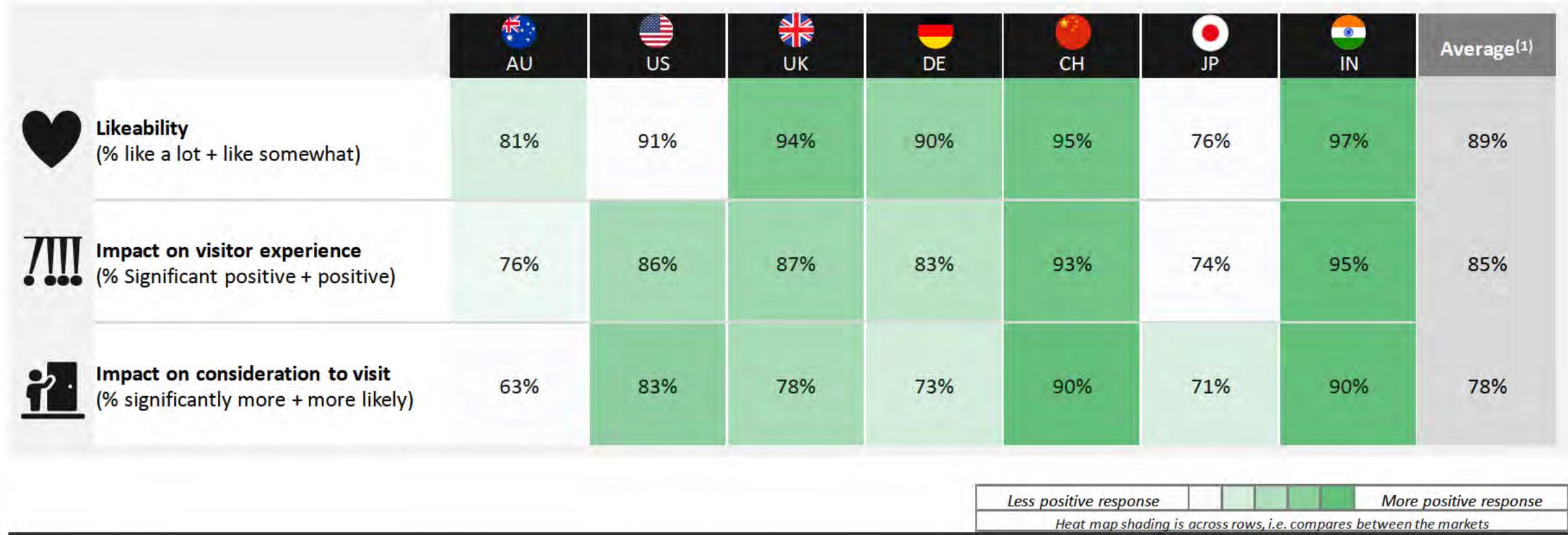
Hongi – a traditional Māori greeting



Trails that minimize visitor impact on the natural landscape

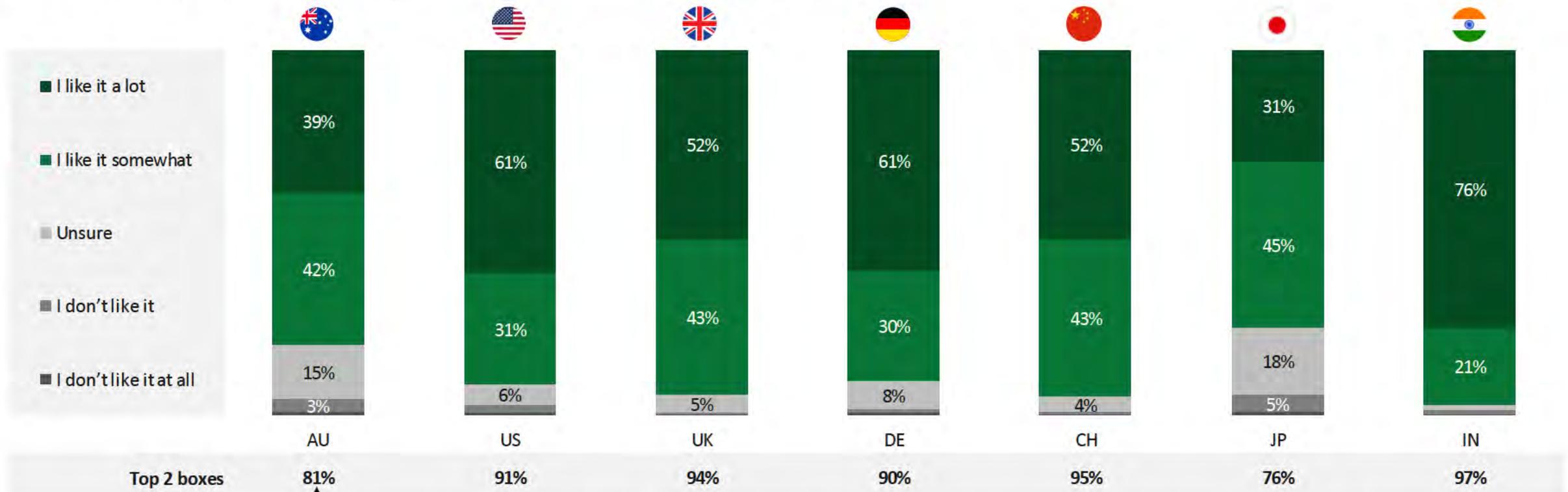
# The proposed enhancements to landscape, conservation and cultural experiences are well received across all markets

## Performance scorecard: Develop enhanced nature and cultural experiences



# The proposed enhanced landscape, nature and cultural experiences are positively received across all markets

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



The likeability of the proposition among the AU past visitors is softer but yet very positive (71% vs. 92% for ACs who have not yet been to New Zealand)

# Providing more opportunities to experience and engage with the indigenous culture is appreciated by the target audiences

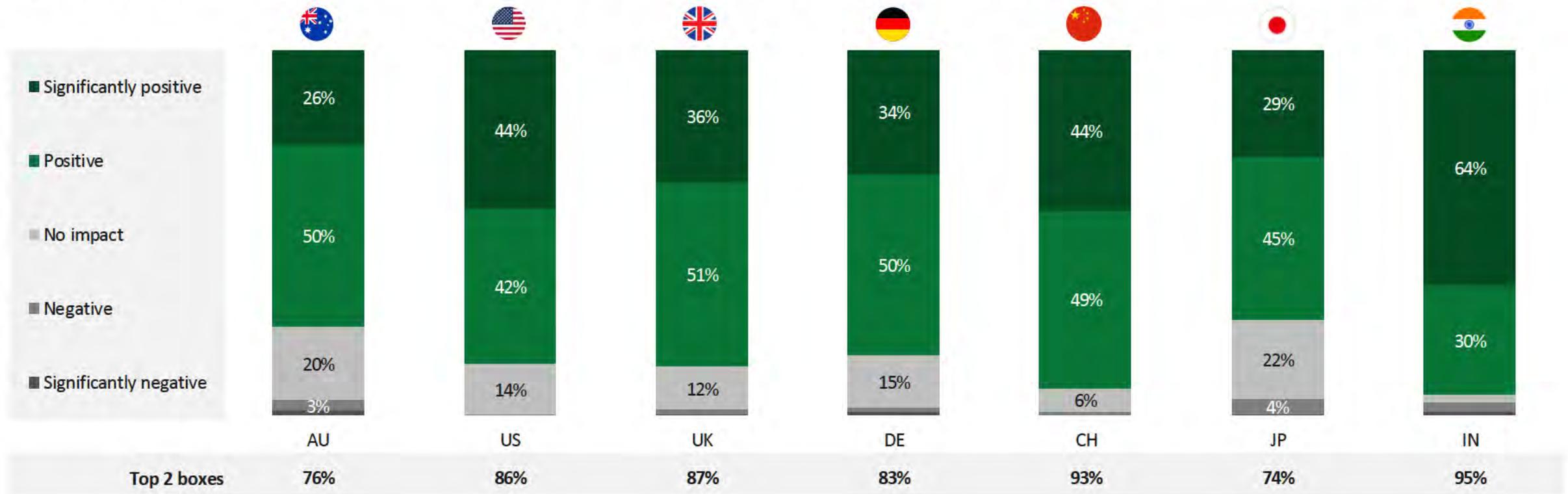


## What is liked about the proposition: **Develop enhanced nature and cultural experiences**

Experiencing local culture	Sustainable infrastructure	Engage with local visitors	Learning
<ul style="list-style-type: none"> <li>— “A whole culture is displayed to you so you can feel the passion to conserve the landscape” (UK)</li> <li>— “Allowing visitors to experience the local culture and customs is one of the happiest moments during the tour. This is something that I personally like very much” (CH)</li> <li>— “As a tourist being able to experience more of the landscape experiences” (AU)</li> </ul>	<ul style="list-style-type: none"> <li>— “Create sustainable infrastructure that blend with the natural setting” (DE)</li> <li>— “I like how the plan is using sustainable structures such as wooden walkways to protect the natural environment and creating real life size exact copies of the buildings and other landmarks for the ultimate real-life experience within the environment that the plan is set” (UK)</li> </ul>	<ul style="list-style-type: none"> <li>— “Engage with local indigenous visitors” (CH)</li> <li>— “The traditional Māori welcome, meeting Māori visitors and learning about their culture” (UK)</li> <li>— “Create walkways, infrastructure, experience Māori culture, meet visitors there” (IN)</li> </ul>	<ul style="list-style-type: none"> <li>— “You can learn more about the local natural landscape, ecological environment and cultural heritage” (CH)</li> <li>— “You can learn languages and walk on beautiful landscapes” (US)</li> <li>— “You can learn about the history” (JP)</li> </ul>
Strongest in CH	Strongest in DE and UK	Strongest in CH and UK	Strongest in US

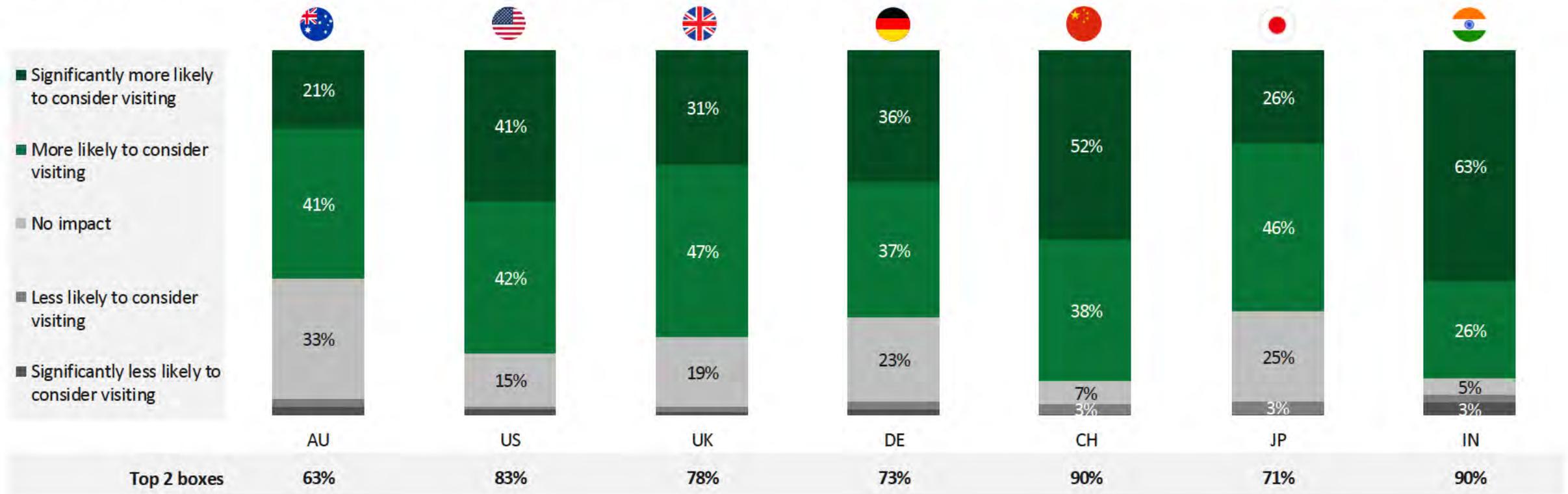
# The proposed enhanced nature and cultural experiences are expected to have a largely positive impact on the Milford Sound / Piopiotahi experience

Impact the proposition might have on visitor experience at Milford Sound / Piopiotahi: **Develop enhanced nature and cultural experiences**



# The proposed enhanced nature and cultural experiences are likely to have a largely positive impact on the consideration to visit Milford Sound / Piopiotahi

Impact the proposition might have on consideration to visit Milford Sound / Piopiotahi: **Develop enhanced nature and cultural experiences**



# While potential visitors show strong interest in better understanding New Zealand culture, they want to ensure cultural experiences are authentic, and engage Māori in consultation

- Cultural education is a positive for visitors, however, **authenticity and repackaging of genuine experiences is a real risk**
- Visitors expressed weariness that cultural experiences could tow the line of inauthentic and commercialised – with Americans and Australians quick to mention Hawaiian luaus, which are seen to exploit Hawaiian culture for commercial gains that do not benefit the indigenous visitors
- It was suggested that instead the visitor centre could be a Māori culture centre, where local Māori are able to use that space for their own benefit – giving visitors the ability to **immerse themselves in Māori culture in a way that isn't forced or 'seen just for tourists'**
- Through all cultural experiences, American and Australians wanted to know that Māori people were engaged throughout the process, and they would benefit from the cultural experiences. **Avoiding exploitation** was a key concern that should be actively mitigated

## Qualitative insights for AU, US and CH

“I expect Māori people to be involved in the plan, and I wouldn't want them to be made into a tourist attraction. Māori people are not tourist attractions, but I do want to learn about New Zealand culture in an authentic way.” – US, AC, family

“There is a worry that what you're consuming is the repurposed gloss for tourists. Like a luau in Hawaii, there has been unveiling that they are owned by big companies, aren't giving back to the visitors, so I would want to know it is authentic and not like that.” – AU, AC, no kids

“Māori must be involved in the planning so it's not forced or tokenistic.” – AU, AC, family

“I really value the cultural education, this is an important part of visiting New Zealand. I love to be engaged with the indigenous culture. Education is so important to families with kids.” – AU, AC, family



# Visitor experiences and sustainable infrastructure that blend into the environment are generally met with positivity, however there are some concerns that Māori culture in this context is ‘forced’

Qualitative insights for AU, US and CH

- Visitors do not want infrastructure to take away from the natural surrounding, so **infrastructure that blends into the environment was welcomed**. If done right, visitors imagine that they can have a richer experience, better understanding the landscapes, New Zealand history, and Māori culture

- Some visitors did however, express **concerns about the potential destruction of nature** and the need to protect existing cultural elements rather than building new ones
- Some visitors also worry that **Māori culture is seen as ‘forced’** in the Milford Sound / Piopiotahi experience, vs. being authentic to the area

*“Part of the beauty of somewhere is when everything around it is considered. That for me amplifies the learning of the area – practicing what you preach. You can’t tell visitors to be good environmentally if the building you’re in doesn’t do the same thing.” – AU, AC, no kids*



*“The Māori culture seems more vibrant and authentic in other places; it feels a bit forced here.”  
– CH, AC, family*



- Chinese visitors in particular, suggested adding in **more signs and explanations to help tourists understand and appreciate the cultural elements**, in the context of the natural landscape

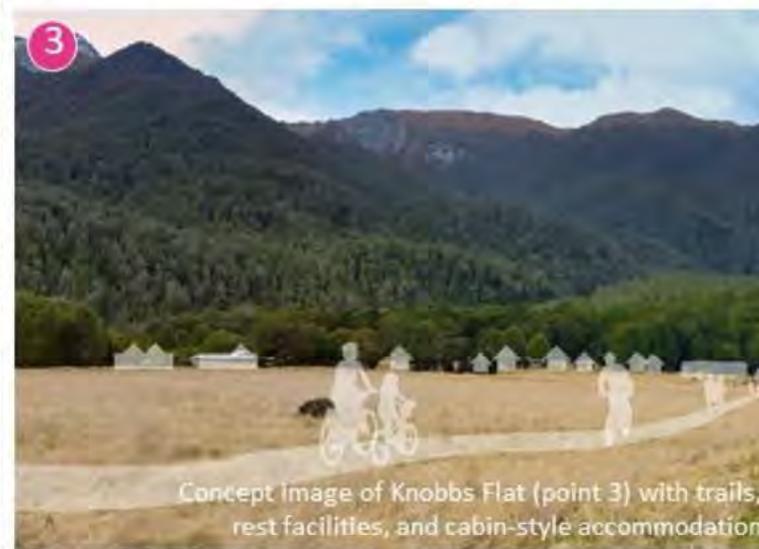
## Proposition: Develop multiple experiences along Milford Road

### 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 / RVs.
- 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 to develop multiple experiences along Milford Road is very well received across all markets

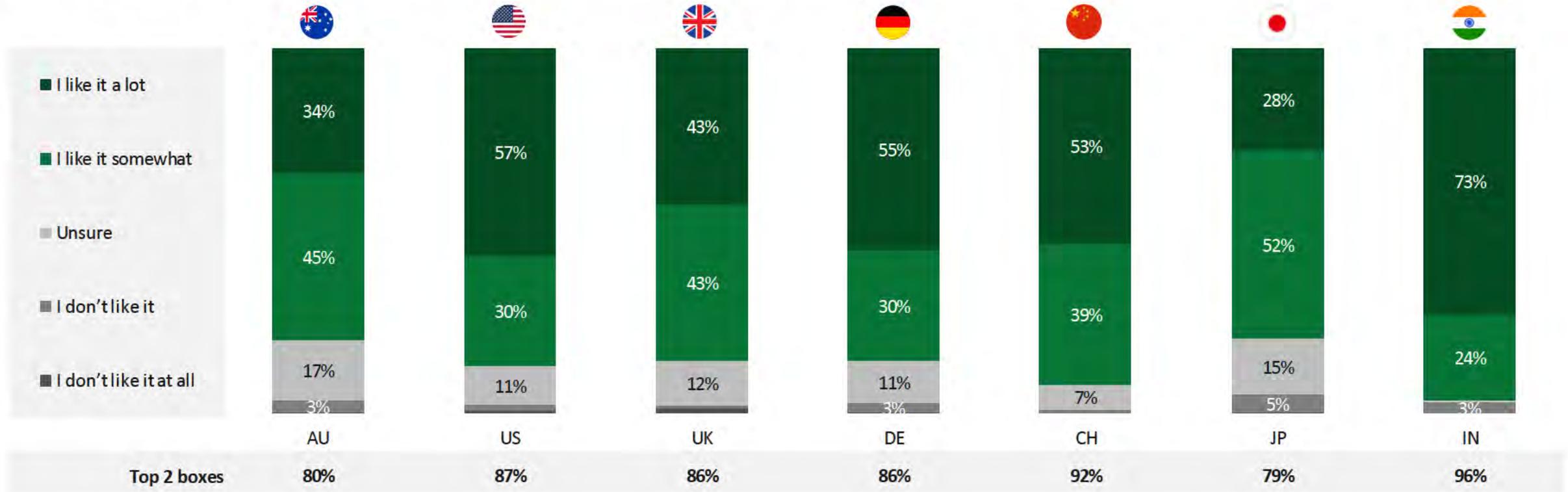
## Performance scorecard: **Develop multiple experiences along Milford Road**

	 AU	 US	 UK	 DE	 CH	 JP	 IN	Average <sup>(1)</sup>
 <b>Likeability</b> (% like a lot + like somewhat)	80%	87%	86%	86%	92%	79%	96%	87%
 <b>Impact on visitor experience</b> (% Significant positive + positive)	71%	84%	82%	79%	91%	77%	94%	83%
 <b>Impact on consideration to visit</b> (% significantly more + more likely)	64%	79%	77%	66%	89%	70%	95%	77%



# The idea to develop multiple experiences along Milford Road is highly likeable

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



# Visitors like that the proposition makes exploring nature more accessible and the overall experience more diverse

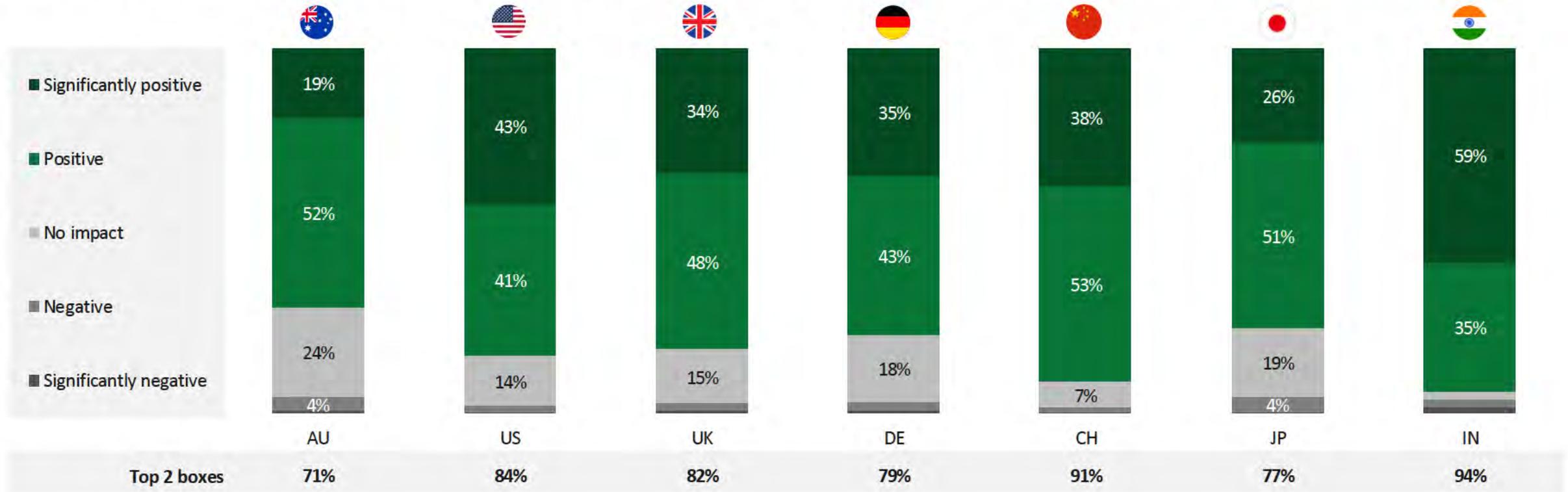


## What is liked about the proposition: **Develop multiple experiences along Milford Road**

Nature	Experience	Cycling	Camping
<ul style="list-style-type: none"> <li>— “Looks like a way to make nature more accessible without destroying the local area by adding roads. It also looks like a manageable plan to do it in phases” (UK)</li> <li>— “This concept will bring more comfort for visitors, and more visitors interested in the park who are not quite so comfortable with the wild nature” (DE)</li> <li>— “I liked the diversity of living things and the fact that I could come into contact with magnificent nature.” (JP)</li> </ul>	<ul style="list-style-type: none"> <li>— “I like that they are planning to offer diverse experiences to allow visitors to choose their level of interaction with the place with a view to protecting the more fragile ecosystems from further damage while allowing visitors to enjoy it” (US)</li> <li>— “Love that visitors are able to experience this place a lot with the views and stops that are included in this plan” (AU)</li> <li>— “It can improve the tourist experience, so that tourists can get better services and have a richer tourism experience” (CH)</li> <li>— “You can experience various ways to visit and see more biodiversity” (CH)</li> </ul>	<ul style="list-style-type: none"> <li>— “I like that visitors can visit various locations very easily and development of cycling and walking tracks helps them to enjoy the location” (IN)</li> <li>— “The cycling is wonderful. Better to have more bikes than cars. I like the idea that visitors can get their experiences along the way” (AU)</li> </ul>	<ul style="list-style-type: none"> <li>— “I love the hop on and off concept because it saves me time of having to plan where to go and what to do when I'm there. I like being guided to the places of interests. I also like enhanced accommodations for camping and RVs. One of the things that will help me save money is probably renting a car and camping so this will be beneficial for me” (UK)</li> <li>— “Enhancement of accommodation facilities, improvement of campsites, campervan facilities, better experience camping” (CH)</li> </ul>
<p><b>Strongest in JP and DE</b></p>	<p><b>Strongest in CH</b></p>		<p><b>Strongest in CH</b></p>

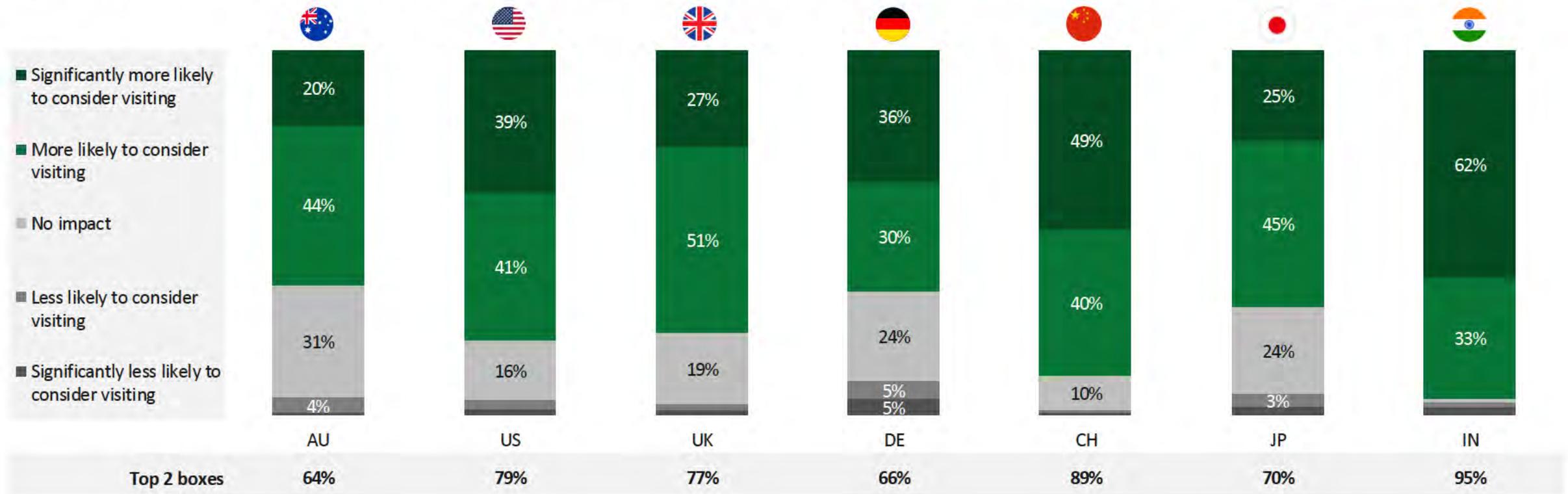
# Having multiple experiences along Milford Road is expected to improve the visitor experience

Impact the proposition might have on visitor experience at Milford Sound / Piopiotahi: **Develop multiple experiences along Milford Road**



# Having multiple experiences along Milford Road is likely to have a positive impact on consideration to visit Milford Sound / Piopiotahi

Impact the proposition might have on consideration to visit Milford Sound / Piopiotahi: **Develop multiple experiences along Milford Road**



## Multiple experiences along Milford Road is seen to enable more personalisation and freedom, and has the added benefit of dispersing crowds

- **Giving visitors more activities and experiences is welcomed** – particularly as it enables them to have an experience personalised to their interests, and is perceived to enable freedom to enjoy Milford Sound / Piopiotahi at their own pace
- People also express their appreciation for the **enhanced facilities**, which can lead to a more relaxed and enjoyable experience for tourists
- Another perceived benefit to multiple interests along the Milford corridor was **dispersion of crowds** – with visitors expecting that they could have quieter experiences, vs. overcrowding in specific areas. This does however depend on the quality of experience

### Qualitative insights for AU, US and CH

“I think we can stay longer, enjoy a slower pace of life, and take our time. It's not like going straight to Milford Sound / Piopiotahi where it feels like a mission to be completed; we can have a more leisurely experience.”

– CH, AC, no kids

“If the whole point of my trip was to visit Milford Sound / Piopiotahi, then none of this is of any interest. However if I want a start-stop holiday, then it's great - so it's either of zero value or a lot of value.”

– Australia, AC, family



# However, the combination of this proposition with the cultural experiences proposition, led some visitors to be concerned about over-commercialisation and impact on the environment

There is risk that the accumulation of propositions can make visitors feel this is a commercial experience

Qualitative insights for AU, US and CH

- There is a need to **balance development with minimisation** – visitors do not want development to the area to outshine the natural environment or take away from it
- **The experiences offered should be grounded in immersion in nature and the natural environment** – however, subtle opportunities to marry comfort with the natural environment are welcomed by visitors

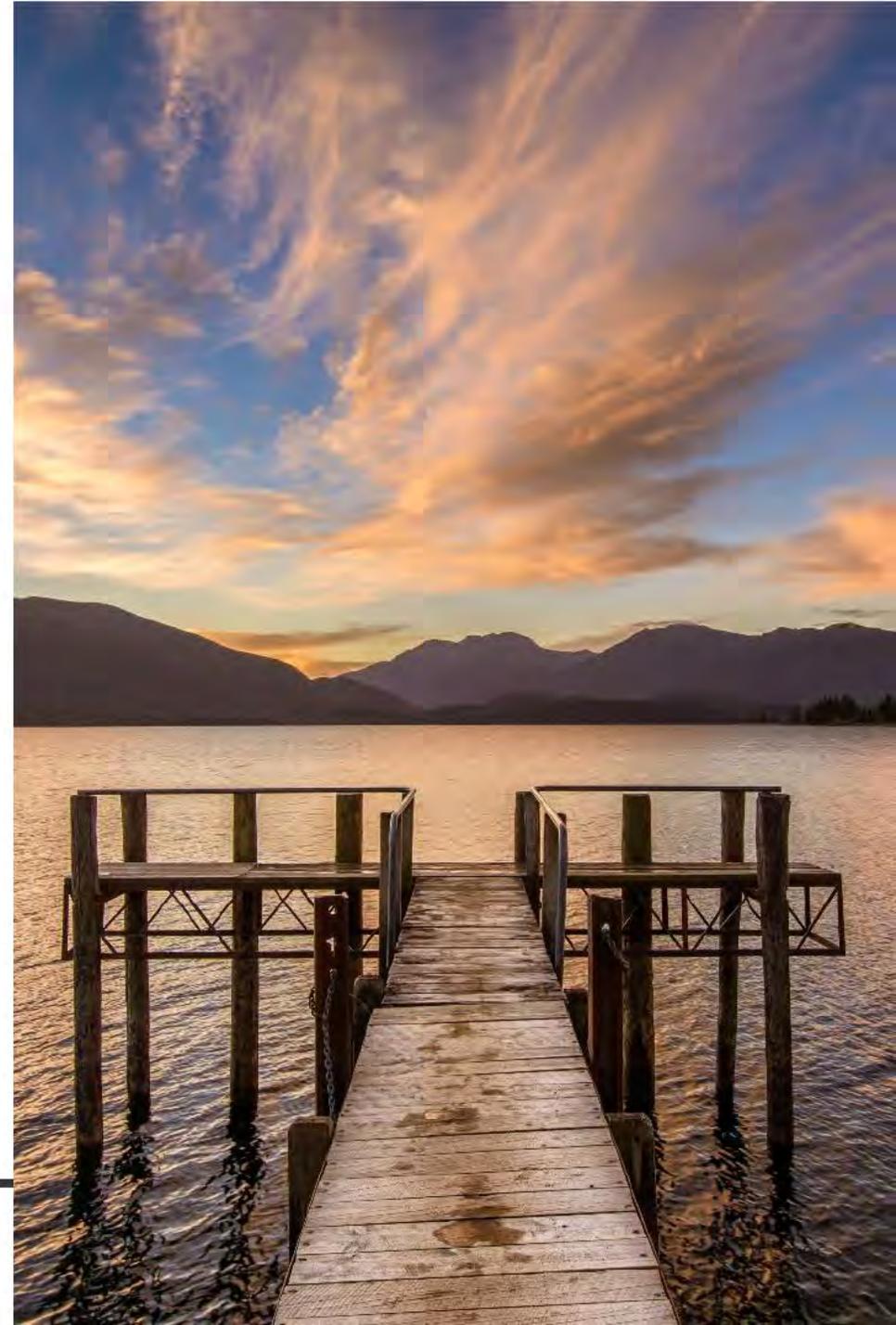
- *"I don't want this to be too gimmicky or touristy. I want to go somewhere that I don't see everyday... I don't want it to become Disney World. Less is more." – US, AC, no kids*
- *"It feels more commercial." – AU, AC, no kids*
- *"Won't this make these areas more vulnerable not less? Also is it becoming too commercial as opposed to unspoilt? Are we losing what is special?" – AU, AC, no kids*
- *"It will grow tourism in the area and turn it into a fun park. The reason people come here is because it's natural and undeveloped. It would be ok to charge people more to do that but to develop it will lead to more tourists and that will ruin it's natural serenity. In addition, trying to include the Catlins is ridiculous - it's too far away and a whole different area" – UK, from quantitative research*



## Expanding the accessibility to broader Southland did not garner much of a reaction in qualitative research

### Qualitative insights for AU, US and CH

- Generally, Milford Sound / Piopiotahi and Queenstown, are the most salient destinations for visitors. With many visitors on a time pressure to achieve as much as they can within a few weeks, access to the broader Southland area can lack in draw and appeal, without a clear benefit to visitors
- More education and awareness must be brought to the Southland region to inspire and motivate visitors to visit the region
- However, Australians, who typically have greater time to explore, or are more readily able to return to New Zealand, see value in this idea



## Proposition: Harness sustainable practises and green technologies

### Harness sustainable practises and green technologies in upgrades and 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 interactive displays 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.



Infrastructure that utilises green technologies, and blends with the natural environment



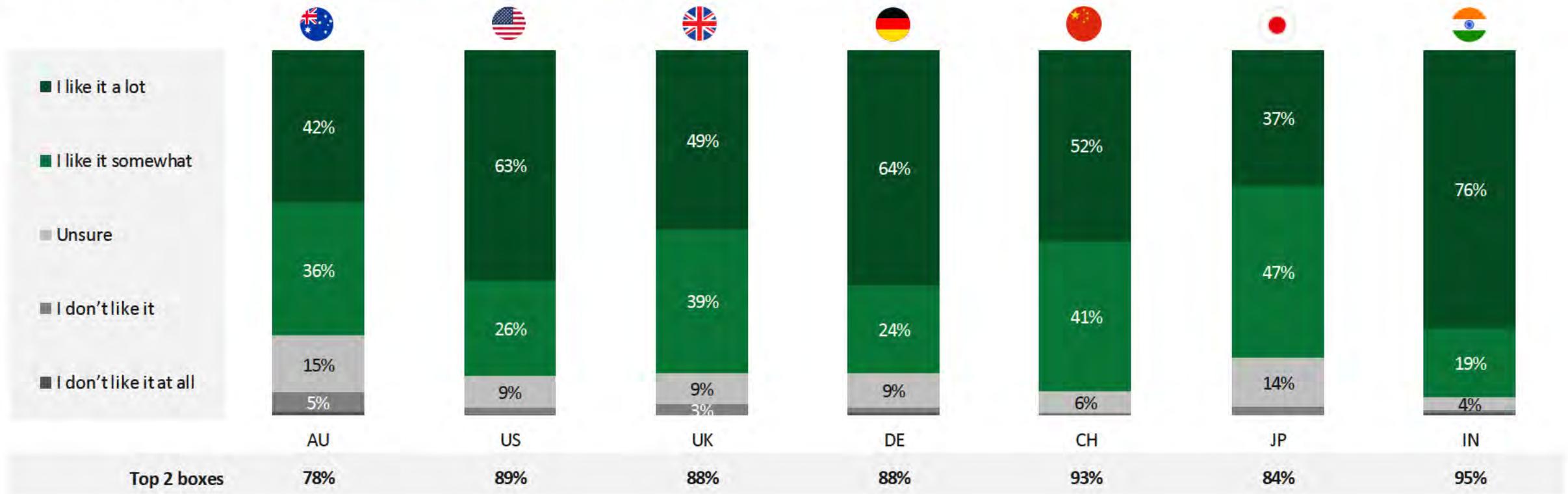
# The idea of introducing sustainable practices and technologies in the development of the area is well received across all markets

## Performance scorecard: Harness sustainable practises and green technologies



# The idea of introducing sustainable practices and technologies in the development of the area is highly likable

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



# The idea is highly liked due to being futureproofed and having a positive impact on the environment

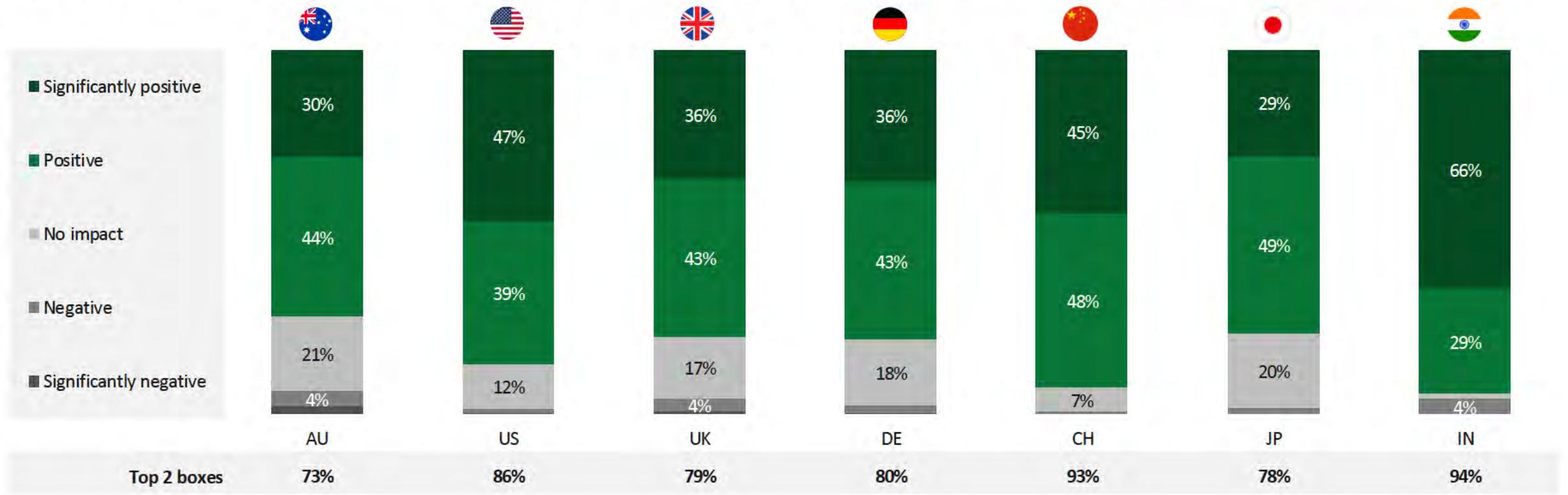


## What is liked about the proposition: **Harness sustainable practises and green technologies**

Sustainable plan	Green technology	Conserve nature	Environmentally friendly buses
<ul style="list-style-type: none"> <li>— <i>“Adopt a sustainable plan, plant more vegetation, etc. There are energy-saving buses. Take you to see the fresh nature” (CH)</i></li> <li>— <i>“I like that it finds solutions to become more sustainable and protecting the environment” (UK)</i></li> <li>— <i>“Sustainable lodging, renewable energy use for transport, native foliage use, reusable natural resource conservation. It's an EXCELLENT plan” (US)</i></li> </ul>	<ul style="list-style-type: none"> <li>— <i>“Use of Green Technology towards preserving the nature” (IN)</i></li> <li>— <i>“The whole idea of practicing green technology” (AU)</i></li> <li>— <i>“Sustainable practices and green technologies are highly appreciating for the conservation of a UNESCO heritage site” (CH)</i></li> <li>— <i>“Sustainable green technology, better protection of scenic spots” (CH)</i></li> </ul>	<ul style="list-style-type: none"> <li>— <i>“I like the contribution to conserve nature and it's wildlife and also the visitor's accommodations” (US)</i></li> <li>— <i>“It is a project to ensure that the nature reserve is passed on to the next generation” (JP)</i></li> <li>— <i>“The buildings that adapt you to nature, the emission-free transfer option and the plan of planting the plants” (DE)</i></li> </ul>	<ul style="list-style-type: none"> <li>— <i>“Environmentally friendly buses and buildings feel advanced in consideration of the times” (JP)</i></li> <li>— <i>“I like zero emissions on the bus” (US)</i></li> <li>— <i>“Mostly the zero emissions buses and restoration of landscapes” (US)</i></li> <li>— <i>“Use of electric buses that minimize energy consumption and use renewable energies” (DE)</i></li> </ul>
Strongest in CH	Strongest in CH and IN	Strongest in JP	Strongest in CH and US

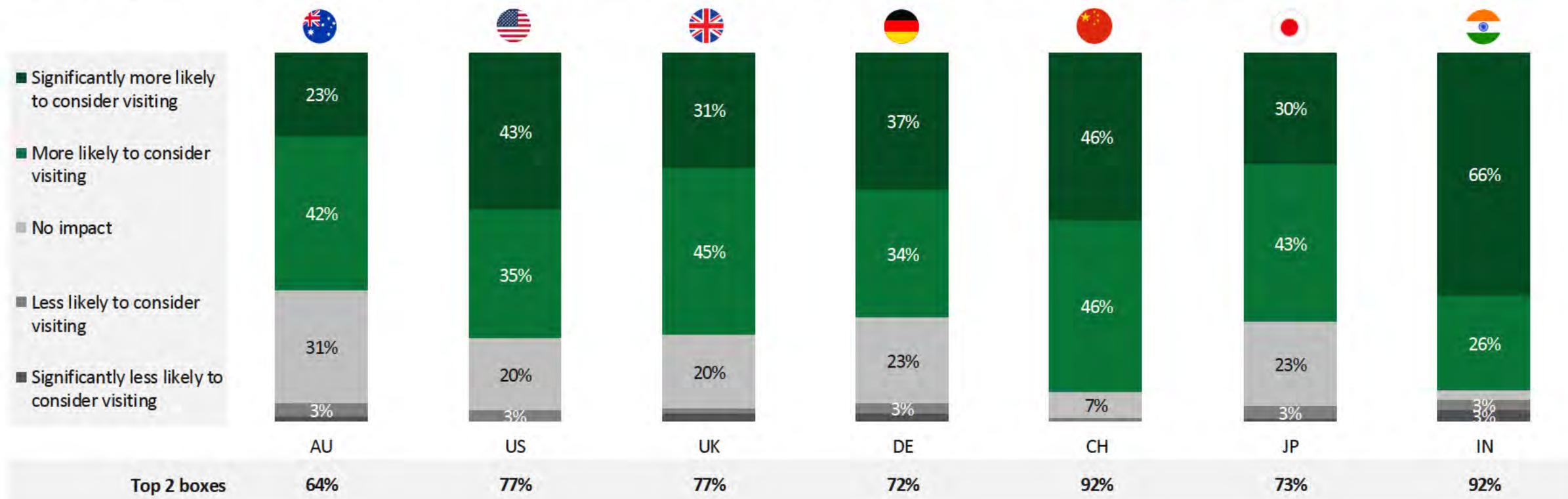
# The sustainable technologies proposition is seen to have a positive impact on the the Milford Sound / Piopiotahi experience

Impact the proposition might have on visitor experience at Milford Sound / Piopiotahi: **Harness sustainable practises and green technologies**



# Knowing that the experience is enhanced by sustainable technologies is likely to have a positive impact on consideration to visit Milford Sound / Piopiotahi

Impact the proposition might have on consideration to visit Milford Sound / Piopiotahi: **Harness sustainable practises and green technologies**



# Green technology, and sustainable buildings are positively received for striking the right balance of development and putting the environment first

- Generally, visitors were positive about the green technology and sustainable development at Milford Sound / Piopiotahi
- However, the motivation for travelling to Milford Sound / Piopiotahi is so grounded in visual beauty, and the opportunity to immerse themselves in a pure environment – therefore **visually blending into the environment is their primary concern**
- **Sustainable and green technologies were seen as a secondary benefit** to offset the potential damage of development and adding more comforts to Milford Sound / Piopiotahi. It's not that visitors don't care about sustainability, but **for many visitors, sustainability is the visual image of a pristine environment vs. intangibles** (i.e. carbon emissions)
- **Further education could help** visitors better understand the benefits of green technologies, such as passive heating, greywater reuse, and hydrogen-power

## Qualitative insights for AU, US and CH

● *“New Zealand is less green washy so I believe this is genuine. This drives my interest and would enhance the trip.”*

– AU, AC, family

● *“This is great blended infrastructure – I love the look of all of them.”*

– AU, AC, no kids

● *“I think this can help maintain the environment and ecology of this region in the long term.”*

– CH, AC, family



## However, some visitors view these initiatives to be 'too late' and are concerned how the development will impact their experience

- Some visitors, typically those of the 'me' mindset, do not think that these environmental protection measures will have a significant positive impact on their current travel experience
- They also argue that the effects of environmental degradation might be felt for a long time, possibly hundreds of years – and the sustainable developments and technologies implemented now act as more of a band-aid
- For these types of visitors, they are more concerned about their immediate experience, and they do not want changes to Milford Sound / Piopiotahi to impact them directly

Qualitative insights for AU, US and CH

● *"I don't think it (sustainable practices) greatly improves the tourist experience. While future-focused environmental protection is commendable, it doesn't have much impact on the current experience."*  
– CH, AC, family



5

In conclusion...



# The Masterplan is positively viewed by international visitors and shows a strong potential to create a world-class visitor experience at Milford Sound / Piopiotahi

## Proposition Performance scorecard

	Develop enhanced nature and cultural experiences	Harness sustainable practices and green technologies	Develop multiple experiences along Milford Rd	Manage access/ transportation with Te Anau as a visitor hub	Prohibiting cruise ships and removing the aerodrome	International visitors access fee
 <b>Likeability</b> (% like a lot + like somewhat)	89%	88%	87%	87%	86%	79%
 <b>Impact on visitor experience</b> (% Significant positive + positive)	85%	83%	83%	83%	81%	73%
 <b>Impact on consideration to visit</b> (% significantly more + more likely)	78%	78%	77%	78%	75%	68%



Base: n= AU 700; US 699; UK 701; DE 700; CH 678; JP 700; IN 698

1. A simple average across markets, and does not take into account the size and potential of the market in terms of visitors. Reported here to provide an indicative overall view
2. All metrics are on a 5 points scale from negative (1) to positive (5), with top 2 positive responses reported

## 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 (ie. day cruises)
- This passive relationship means it is difficult to 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

