

Final



MILFORD  
OPPORTUNITIES

# MILFORD OPPORTUNITIES PROJECT

Te Anau Basin Study

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**FINAL**

## EXECUTIVE SUMMARY

Te Anau is the key town on the Milford Sound Piopiotahi journey. Along with Manapouri, there is potential to develop and cater for increased visitor numbers within the Te Anau Basin. This report presents the findings of the study that understands the social appetite for tourism development, including the exploration residents' perceptions of the social impacts of tourism and on increasing visitor numbers in the area. It seeks their ideas for tourism and supporting infrastructure development. Through a mixed-mode survey research design, this study allowed for consultation and engagement with the local people who will serve as the beneficiaries of tourism.

The first two chapters of this report contextualises this study. Chapter 1 outlines the background and rationale of the study. In a nutshell, there is a strong need to integrate the perspectives of the local community in tourism planning. Being an integral geographical point in the Milford Sound Piopiotahi journey, it is essential to know the view of Te Anau residents and secure the social licence for tourism to expand in the area. The second chapter presents the scope and context of the study. It outlines baseline information about the locality, particularly tangata whenua, local community, its economy, tourism, environment and existing social services and infrastructure.

The third chapter explains the research design and methods employed in this inquiry. A four-step process that entails the social impact assessment framework development, data collection, data analysis and findings synthesis was discussed. Through these approaches, the local community was able to communicate their opinions and ideas towards the impacts and future of tourism in Te Anau.

The fourth chapter presents the findings of the survey, particularly the residents' perceived social impacts of tourism. Overall, the positive economic benefits of tourism were recognised by the residents, as these outcomes were either highly-rated or dominant in their qualitative responses. Increasing visitors and tourism activities in the destination is perceived to make Te Anau, *A Prosperous Community*. However, economic development from tourism and tourism development itself must be carefully controlled and managed. Negative consequences that may potentially occur emerged from resident narratives, namely:

- Expensive cost of living
- Pressure on infrastructure and social services
- Degradation of the environment
- Lower quality of life

Conversely, there is strong level of support of tourism coming from the local community, as outlined in Chapter 5. No respondents expressed opposition towards tourism development. However, the opinions for increasing the number of visitors from what they were pre-COVID-19 are mixed; the majority indicated no change in these numbers as the town was receiving the ideal influx during those times.

The ideal forms of tourism development and infrastructure requirements are also presented in the fifth chapter. *Slow experiential tourism, nature-based tourism, adventure and outdoor recreation, cultural tourism and family-based activities*, were delineated as acceptable forms of tourism. Infrastructure ideas themed into *community infrastructure and social services, access and parking, accommodation, visitor amenities, food and shopping, art and culture, and visitor attractions and activities*, were delineated from wide range of suggestions.

Based on these insights, the following is a list of recommended options to support the vision of making Te Anau a tourism hub:

- Free public toilets
- Strategically located carparks
- Develop a transport hub/bus interchange in Te Anau

- Develop a visitor hub that showcases the Milford Sound Piopiotahi and Milford corridor experience in Te Anau
- Develop a Te Anau Community Hub
- Revitalise town centre by introducing diverse food and retail establishments
- Develop new accommodation establishments
- Develop staff accommodation in Te Anau
- Consider lakefront activities in Te Anau
- Create new walking/cycling tracks
- Enhance Te Anau airport – including scheduled air service.

# 1 PROJECT BACKGROUND / DEFINITION

## PURPOSE OF PROJECT

- 1.1 The purpose of the Milford Opportunities Project (MOP) is to develop a collaborative Master Plan for the Milford corridor and Milford Sound Piopiotahi sub-regional area to ensure:

*“that Milford Sound Piopiotahi maintains its status as a key New Zealand visitor ‘icon’ and provides a ‘world class’ visitor experience that is accessible, upholds the World Heritage status, national park and conservation values and adds value to Southland and New Zealand Inc.”*

## PROJECT AMBITION

- 1.2 The Milford Opportunities Project Master Plan must be world class, ambitious and creative. It should not be constrained simply by what can be done now within the current rules, instead it must consider what needs to be done and what the most appropriate outcome will be. The project is about making a substantive change and creative ‘outside the box’ thinking is needed before it is filtered by practical operational realities. The outcome must be:
- Consistent with the project’s purpose and objectives.
  - Consider a time frame of at least 50 years.
  - Able to significantly enhance both conservation and tourism.
- 1.3 The Master Plan must give effect to the seven pillars (or values) identified in Stage One of the project and be supported by robust assessment and analysis.

## PROJECT PILLARS

### 1) MANA WHENUA VALUES WOVEN THROUGH



Iwi’s place in the landscape and guardianship of mātauranga Māori me te taiao (Māori knowledge and the environment) are recognised. Authentic mana whenua stories inform and contribute to a unique visitor experience.

### 2) A MOVING EXPERIENCE



Visitors experience the true essence, beauty and wonder of Milford Sound Piopiotahi and Murihiku/Southland through curated storytelling, sympathetic infrastructure and wide choices suited to a multi-day experience

3) **TOURISM FUNDS CONSERVATION AND COMMUNITY**



The visitor experience will become an engine for funding conservation growth and community prosperity.

4) **EFFECTIVE VISITOR MANAGEMENT**



Visitors are offered a world class visitor experience that fits with the unique natural environment and rich cultural values of the region.

5) **RESILIENT TO CHANGE AND RISK**



Activities and infrastructure are adaptive and resilient to change and risk, for instance avalanche and flood risks, changing visitor trends, demographics and other external drivers.

6) **CONSERVATION**



Manage Fiordland National Park to ensure ongoing protection of pristine conservation areas, while enabling restoration of natural ecological values in less pristine areas.

7) **HARNESS INNOVATION AND TECHNOLOGY**



Leading technology and innovation is employed to ensure a world class visitor experience now and into the future.

**PROJECT OBJECTIVES**

1.4 The objectives for the MOP are:

- a) Protect and conserve the place now and into the future.
- b) Recognise iwi's place in the landscape, guardianship and values.

- c) Increase the effectiveness, efficiency and resilience of infrastructure.
- d) The visitor experience funds conservation growth and community prosperity.
- e) Reduce visitor exposure and risk to natural hazards.
- f) Increase the connection of people with nature and the landscape.
- g) Offer a world class visitor experience that is unique and authentically New Zealand.
- h) Identify sustainable access opportunities into Milford Sound Piopiotahi.
- i) Identify parts of the built environment that are surplus to requirements or could be shifted to improve visitor function and resilience.
- j) Identify opportunities to create additional economic benefit for the communities of Southland and Otago including Queenstown via the pulling power of Milford Sound Piopiotahi.
- k) Develop a Master Plan that:
  - i. Creates and encapsulates a unique experience.
  - ii. Is culturally, environmentally and physically appropriate and sustainable.
  - iii. Clearly articulates what is acceptable and what is not acceptable visitor management and development within the identified value framework.
  - iv. Considers the impacts of climate change at place.
  - v. Supports the economic stability of Te Anau, Queenstown, Southland and NZ Inc.
  - vi. Portrays a clear future for investment.
  - vii. Informs the review processes for Fiordland National Park Plan and Southland Coastal Plan.
  - viii. Sets out the ideal governance and management structure to ensure successful delivery on the objectives.

## **NATURAL DISASTERS AND COVID-19 IMPACTS**

- 1.5 MOP stage 2 approach was impacted significantly by the 2020 Fiordland floods and then the COVID-19 pandemic.
- 1.6 Strategically, the consultant project team were required to be flexible in our approach and creative in our delivery. As a response to changing conditions we proposed methodologies to make allowance for factors such as lack of visitors, an initial inability to undertake site visits, and at times a restricted or reduced availability of staff from external organisations.

## **REQUIREMENTS FOR THE TE ANAU BASIN WORKSTREAM**

- 1.7 Te Anau is the key town on the journey to Milford Sound Piopiotahi, and along with Manapouri, there is potential to develop and cater for increased visitor numbers within the Te Anau Basin. Development and tourism in general bring a monetary benefit to areas as well as a social and infrastructural cost which also needs to be considered.
- 1.8 Understanding the social appetite for dealing with the increasing numbers of visitors is important as are the potential infrastructure requirements for the Te Anau Basin (Te Anau/Manapouri). This will include consultation and engagement with the local community. Ensuring that tourism's social license is maintained or enhanced through good planning is as critical as ensuring that there is appropriate infrastructure in place to cater for the community and the increased number of visitors.

1.9 The key outcomes for the Te Anau Basin Workstream are to:

- Produce a report that includes:
  - Identification of the potential opportunities and impacts for the Te Anau Basin of increasing visitor numbers.
  - An assessment of the social and infrastructure needs in the Te Anau Basin to support increased visitor numbers.
  - Identification of the type/style of development that is most acceptable.
  - Identification of the critical social values and infrastructure requirements that planning for increasing visitor numbers will need to address on the timescales of 3, 10-15, and 25 years.
  - An estimate of the costs of providing for the above.
- Contribute information to the Master Plan that enables the identification and development of strategic options.

## WORKSTREAM OBJECTIVES

1.10 Te Anau can offer much to improve the visitor experience on the Milford Sound Piopiotahi journey and support greater distribution of tourists across the lower South Island. The MOP objectives were refined for ease of application. The application of the refined objectives within the Te Anau Workstream is shown in the table below.

Table 1. Application of the MOP Stage 2 Objectives to the Te Anau Basin Study

#	Stage Two Objective	Application to Te Anau Basin Study
1	Ngāi Tahu's role as mana whenua and Treaty partner is acknowledged and Te ao Māori values are embedded throughout.	How can the mana whenua values and aspirations be recognised and embedded in the future development of tourism in Te Anau Basin, which aims to support the development of tourism to Milford Sound Piopiotahi.
2	Milford Sound Piopiotahi is protected and conserved as required by its World Heritage status.	How can the potential tourism development model adopted in Te Anau support the protection and enhancement of Milford Sound Piopiotahi in the next 50 years?
3	The visitor experience is world class and enhances conservation of natural and cultural heritage values and community.	How can the potential tourism development model adopted in Te Anau Basin enhance conservation initiatives, embed cultural heritage values, and subsequently enrich visitor experiences at Milford Sound Piopiotahi?
4	Infrastructure is effective, efficient, resilient, and sustainable (including access methods).	What infrastructure and facilities could be built in Te Anau to support the sustainable development, and the short- and long-term growth of tourism at Milford Sound Piopiotahi?
5	Visitors benefit communities, including Ngāi Tahu, communities of Te Anau, Southland, and Otago.	What are the potential opportunities, impacts benefits of Milford Sound Piopiotahi tourism development, on the communities living in the Te Anau Basin? What tourism development model(s) is most acceptable to the local community?

## 2 TE ANAU BASIN STUDY: SCOPE AND CONTEXT

- 2.1 Tourism is popularly adopted as a strategy to stimulate economic development, support nature conservation and provide social benefits to many communities worldwide. Apart from being stewards of nature, local communities surrounding protected natural areas should be at the forefront of tourism development.
- 2.2 An outcome in New Zealand's tourism strategy is for regions and communities to benefit from tourism. Recently, the Parliamentary Commissioner for the Environment recommends any future central government funding for tourism infrastructure conditional on environmental criteria and aligned with mana whenua and the local community's vision for tourism development. Integrating the aspirations of local communities at the very first stages of planning can make tourism more sustainable and inclusive.
- 2.3 Visitor numbers to Milford Sound Piopiotahi have grown rapidly in the past decade. Managing tourism and the pressure of consistent visitor growth involves planning for infrastructure and services in and around local destinations. The development of infrastructure and services should not only adapt to the growth in visitor numbers, but also to the needs of local communities.
- 2.4 Development and tourism in general bring financial benefits to localities, as well as social and infrastructure costs which also need to be considered. Changes to tourism might enhance community wellbeing, but there can also be externalities. Externalities are impacts that are either unintentional or can be produced through the design process and development model implemented in a destination. Most of the time, local communities are the most affected when externalities occur.
- 2.5 This study aims to understand the social appetite for increasing the numbers of visitors and tourism-related infrastructure in Te Anau Basin, from the perspective of the local community. This study is part of a larger tourism master-planning stage for the Milford Opportunities Project (MOP). The findings of this study serve as a basis for the development of an approach to support communities in the Te Anau Basin – Te Anau and Manapouri – to capitalise on the opportunities created by Milford Sound Piopiotahi as one of New Zealand's flagship visitor attraction.

### RATIONALE OF THE STUDY

- 2.6 During Phase 1 of the MOP (2018–2019), stakeholders were asked to envision any changes they would prefer to occur for the development of Milford Sound Piopiotahi. The result of that engagement identified the importance of Te Anau as the closest township, as it is less constrained by development and able to provide infrastructure and services to better support the visitor experience and relieve pressure on Milford Village.
- 2.7 The distribution of visitors through the Southland Region is critical and viewed as a solution to dealing with the pressure experienced in major tourist centres. Te Anau is the key town on the journey to Milford Sound Piopiotahi, along with Manapouri. However, Te Anau mainly serves as a stop for visitors travelling from Queenstown to Milford Sound Piopiotahi. Minimal economic benefits to the Te Anau are being generated due to most visitor experiences beginning in Queenstown.
- 2.8 There is potential to develop and cater for increased visitor numbers within the Te Anau Basin, with Te Anau as the hub for visiting Milford Sound Piopiotahi and a destination in its own right. It is essential to support the Fiordland Community Board and Great South in the development of a destination management strategy and the implementation of that strategy.
- 2.9 Another gap identified during the Phase 1 of the MOP is the lack of insights into the views of Te Anau Basin residents towards increasing visitor numbers to their community. Gaining the support of local communities is crucial for any tourism development project. It is paramount to understand residents' views and support for tourism.



- 2.10 Assessing residents perceived social impacts of tourism helps in understanding the social licence for greater development of the visitor economy. This will ensure the role Te Anau has in enhancing the visitor experience for those attracted to Milford Sound Piopiotahi. Most importantly, this optimises the benefits to the wider Te Anau and Manapōuri community. This undertaking will provide insights into how benefits can be shared within and around the Te Anau Basin as a significant gateway for visitors to Milford Sound Piopiotahi.

## CONTEXT OF THE STUDY

- 2.11 This study elicits the opinions of people living in Te Anau and Manapouri, and nearby areas. The people represented in this study live, work and play in and around Milford Sound Piopiotahi and the broader Fiordland National Park. They are directly affected by the impacts of tourism, more so, if Te Anau is enhanced as a hub. These individuals interact with visitors and have a strong interest in the provision of tourism-related infrastructures and services.
- 2.12 This study was situated in the Te Anau Basin (see Figure 1: Te Anau Basin – the geographical scope of the study highlighted in green.). The following sections discuss the geographical scope and context of the study and provide baseline information about the locality.

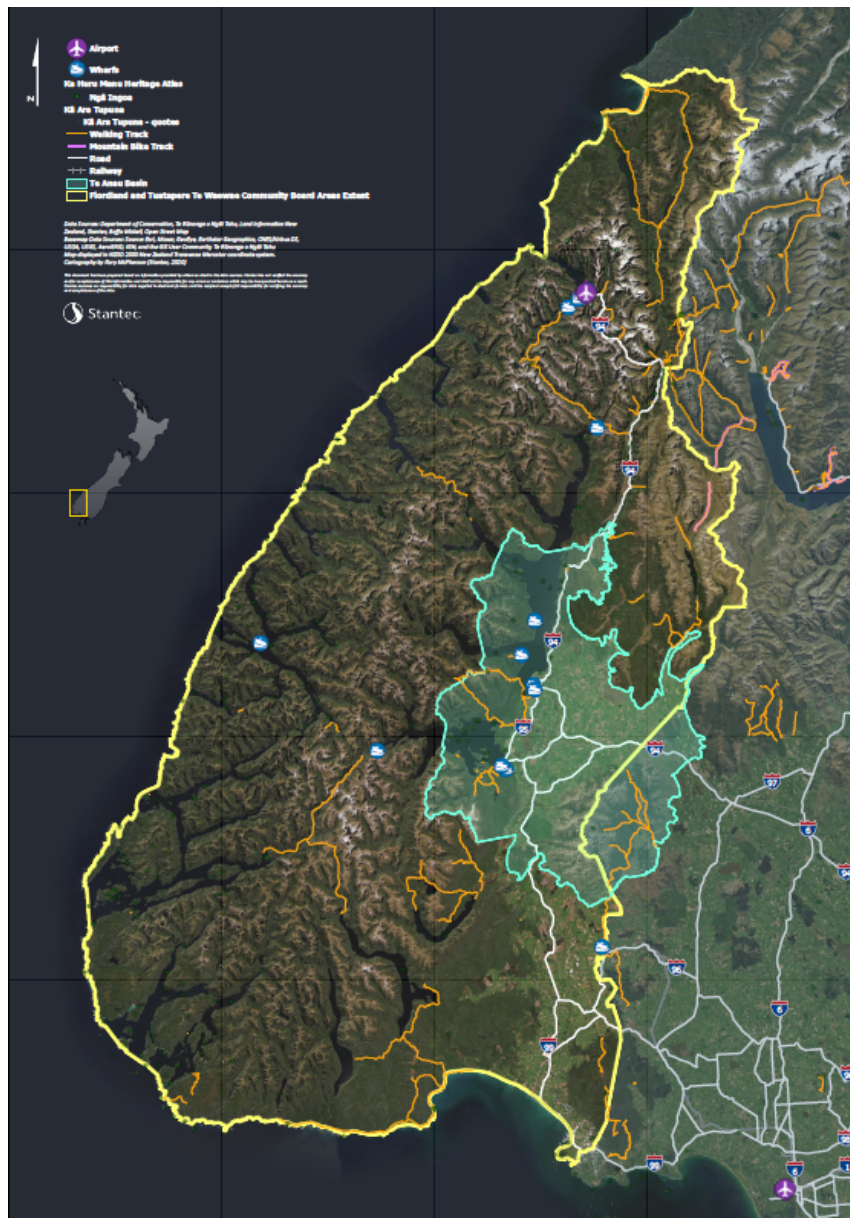


Figure 1: Te Anau Basin – the geographical scope of the study highlighted in green.

- 2.13 The 2018 census by Statistics New Zealand reports 2,538 residing in Te Anau basin (see Appendix 1: The People of Te Anau). The three main ethnicities in the area are European (83%), Asian (12%) and Māori (8%). This data provides baseline socio-demographic information; this information may not reflect actual numbers due to the impacts of the COVID-19 pandemic.

## TANGATA WHENUA

- 2.14 The Māori name Te Ana-au can be translated as "The Swirling Cave" (te: the; ana: cave; au: swirling) in reference to the water running through it. The water, Tunnel Burn, is the outflow of Lake Orbell. The entrance was rediscovered in 1948 by Lawson Burrows, who found the upper entry after three years of searching, following clues in old Māori legends.
- 2.15 Māori living in Te Anau and Manapōuri are the second largest ethnic group after Pakeha at 8.5 percent of the population, compared to 10 percent for the Southland District (2018 Census). There are locations within the Te Anau Basin study area that are recognised in legislation as protected nohoanga (traditional camping sites), along with the Cascades River, Manawapōpōre/Hikuraki (Mavora lakes), Te Ana-au (Lake Te Anau), and Moturau (Lake Manapōuri). The lakes are also Statutory Acknowledgment Areas under the Resource Management Act for which any proposed activity must be consulted with Ngai Tahu.
- 2.16 The key cultural narrative for the masterplan project to define this place is by recognising Tū te Rakiwhanoa and his work to shape Te Rua o te Moko with Hine Tītama. In this sense, the cultural narrative is the context in which to consider appropriate and inappropriate development and management. It sets an expectation of best practice, acknowledging the mana of Tū te Rakiwhanoa and that Te Rua o te Moko was his final work, his masterpiece.
- 2.17 Mana whenua want both Ngāi Tahu whānui and manuhiri to be in awe of the majesty that Tū te Rakiwhanoa crafted and for subsequent generations to experience the wairua of Piopiotahi. In initial interviews with Māori and Pakeha, there is alignment in bringing these stories to life in the landscape and through the visitor experience through service and product development that follows a tikanga-based approach (e.g., using the concession management framework to ensure activities follow appropriate cultural protocols).

## THE COMMUNITY

- 2.18 The Te Anau Basin community makes up a diverse collection of interests. During prior interviews with local community members, many described Te Anau as a close-knit community with a high number of leaders and volunteers in the area. The active role of schools, organisations and businesses that help to shape the community spirit has been indicated in these conversations.
- 2.19 The Fiordland Community Board have widely engaged with the local community on many plans and projects. The current community plan and destination management strategy recognise a vision for Fiordland to be a thriving and connected community of people that welcomes its visitors, embraces sustainability, and takes care of its natural environment. The following four outcomes provide the board with a future focus on which it can then develop key projects and actions:
- A community that attracts business, investment, people, and visitors
  - A community that sustainably protects and enhances its natural environment
  - A community that enriches its lifestyle through well thought out planning for growth
  - A community that is connected, safe and healthy with access to excellent services.
- 2.20 Te Anau is a town with a busy cultural calendar. The local community enjoys events throughout the year celebrating music, arts sport, and nature. Events include, but are not limited to:
- Illumination Festival
  - Fiordland Big 3

- Te Anau Tartan Festival
- Te Anau Manapōuri Fishing Classic
- Kepler Challenge Run
- Santa Parade
- Lake Te Anau Swim
- Milford Mountain Classic Bike Ride
- Cardboard Boat Race
- Te Anau Rodeo
- Flower & Art Shows

**THE LOCAL ECONOMY**

2.21 The rural sector drives the local economy throughout the year, providing agriculture-based services as a rural services hub. Figure 2. Break-down of the local economy (2017) shows the economic activity by sector and shows that the Te Anau Basin local economy is dominated by hospitality and trade services (including retail and wholesale activities) as well as the services that make Te Anau an important hub of economic activity for the district. Within the Other Services category, there are a small number of businesses that close during the winter period as they are dependent on visitors for their economic viability.

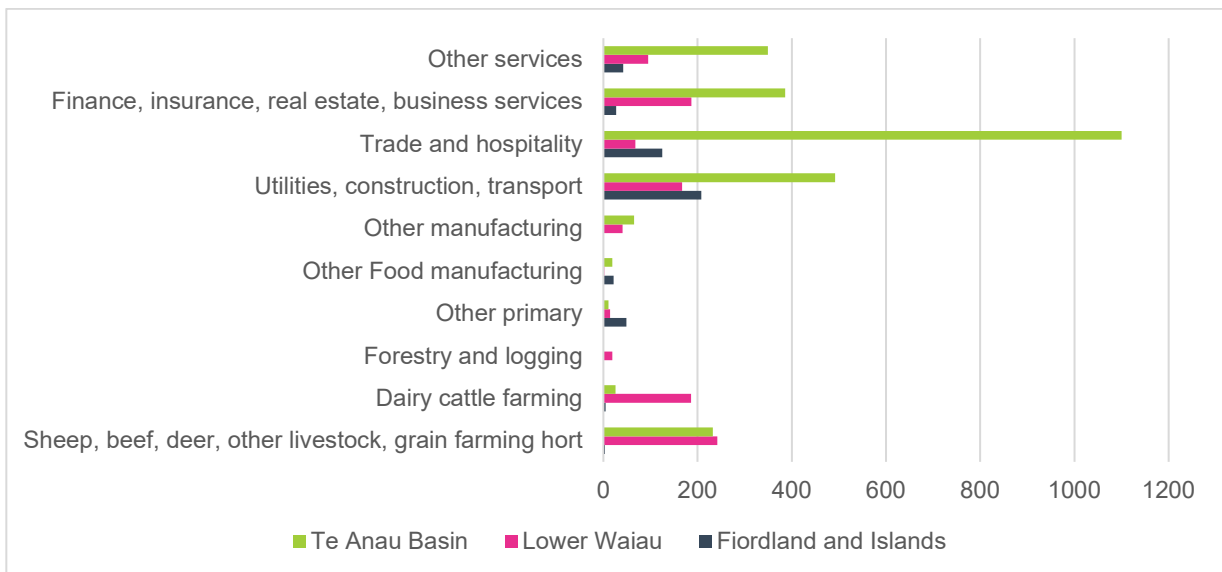


Figure 2. Break-down of local economy (2017). Source: Environment Southland

2.22 Great South, the region’s economic development agency recognises the collective determination of the Southland community when working together towards a common goal. It recognises tourism as a job-intensive industry that can significantly contribute to the region’s wealth and population, but also that the industry is underdeveloped in the region. The summer season brings increased spending by visitors (with a strong number of domestic visitors from within the Southland region) and through international tourism associated with Milford Sound Piopiotahi.

**TOURISM**

2.23 Most tourism activities within the area occur in and around Lake Te Anau. Tourist activities include scenic flights, lake cruising, fishing, kayaking, and exploring the Te Anau Glowworm Caves and Bird Sanctuary. Apart from being the gateway to Milford Sound Piopiotahi, the township is also the main visitor base for visitors to the Fiordland National Park.

- 2.24 Moreover, there are also a significant number of visitors going to Doubtful Sound Patea via Lake Manapouri; this is as an option for visitors and as the only alternative activity when the Milford Road is closed. Likewise, this shapes the potential for promoting the Manapouri area as the gateway to Doubtful Sound Patea.
- 2.25 There is a wide range of accommodation options in Te Anau, including hotels, motels, apartments, lodges, bed and breakfast, backpacker hostels, holiday parks, camping grounds and AirBnb rentals. Bars, cafes and restaurants can be found at the town centre, too. Some challenges and opportunities need to be considered behind visitor accommodation.
- 2.26 Tourism is largely seasonal which creates hardship in winter with many workers often on reduced hours. According to earlier interviews with business owners, there is also a shortage of labour supply in the high season due to high levels of competition, a lack of suitable housing across a range of housing type needs and the transient nature of the tourism labour force.
- 2.27 The Fiordland Community Board has identified through its community engagement that the generation of year-round employment and promotion of longer visitor stays will help it to address housing issues and develop more winter offerings to enable more year-round employment opportunities. Through our interviews, an added benefit of this will also be an improved quality of life (more to see and do) and greater retention of people in the region (including local youth).
- 2.28 The Fiordland Community Board are currently implementing a destination management plan that incorporates the development of the following initiatives:
- Fiordland Heritage Centre
  - Dark Skies Sanctuary Status
  - Boutique/Eco accommodation (with staff accommodation)
  - Activity-based touring routes/itineraries (in collaboration with regional tourism organisations)
  - Events/Conferences (e.g., a crayfish or creative arts festival).
- 2.29 The visitor economy is occasionally subjected to economic shocks caused by: 1) natural calamities, such as flooding and avalanche which can limit access to visitor attractions<sup>1</sup>; and 2) economic recessions, particularly in countries such as Australia, Europe, the United States and China (as occurred during the 2007 global financial crisis).
- 2.30 The recent COVID-19 pandemic is an example of an economic shock caused by reduced tourism activity. The closure of large retail chains has had a dampening effect on the local economy since the economic impacts of COVID-19 set in, with a growing list of vacant stores around the town centre. Currently, local entrepreneurs living and working in Te Anau that calling out for support towards the recovery of the local economy through tourism.

## THE ENVIRONMENT

- 2.31 Fiordland National Park is internationally renowned for its conservation successes. There has been a broad consensus throughout earlier interviews with local members of the community and with stakeholders engaged with reference group meetings that the sense of natural beauty, close access to wilderness areas and a general conservation ethos builds positively upon Fiordland's reputation as one of the natural wonders of the world.
- 2.32 For Te Anau, this environmental ethos is visible in the wide range of community volunteer initiatives including environmental education initiatives and improved access through the development of trails to and through these natural areas. Earlier discussions with stakeholders

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<sup>1</sup> Interviews with owners of tourism establishments mentioned 2018 was last "full tourism season" in Te Anau.

show a common understanding that Te Anau's point of difference when comparing to Queenstown and other destinations was that Te Anau should attract people who wish to stay longer to properly experience the natural beauty of the area.



Figure 3. Lake Te Anau. Photograph by R. Aquino (2021)

- 2.33 There is a growing recognition of the importance of a Te Ao Māori view of conservation science and kaitiakitanga. This is already developing through initiatives such as Rakatu Wetlands and Te Koawa Turoa o Takitimu. The role of Māori traditional knowledge in the management of pests and the restoration of mauri can contribute to the region's international point of difference and help to attract visitors who are more likely to exhibit the behaviours that align with tikanga Māori.
- 2.34 Amongst the organisations and businesses in Te Anau there is a strong link with environmental sustainability and recreational opportunities. Hunting, conservation, physical fitness, recreational equipment hire and tourism are interests well represented by groups operating in the area.
- 2.35 The Fiordland Community Board Plan recognises the community's desire to sustainably protect and enhance its natural environment. It has identified the following actions to deliver this outcome:
- plan, prioritise and implement projects which will enhance natural elements, develop outdoor recreation assets whilst also ensuring they can be easily accessed. This includes native planting, beautification and setting up community gardens.
  - develop a recycling initiative plan for the Fiordland area that will also extend beyond its boundaries into other parts of the District.
  - work with the Department of Conservation in the review of the Fiordland National Park plan to open up more multi-purpose trails to develop connectivity within and between townships and settlements.

## **SOCIAL SERVICES AND INFRASTRUCTURE**

- 2.36 This section outlines the existing social services and infrastructure in Te Anau that may be impacted by what is proposed in the masterplan (e.g., growing tourism activity increasing demand on community facilities).

**HEALTHCARE**

- 2.37 There is one medical centre in Te Anau that meets most day to day needs of the local community, and generally a local resident can get an appointment the same day, or at least within 24 hours. The community does however depend on distant facilities within the Southland District Health board for significant treatments, referrals and follow-up appointments (e.g., for broken bones). A community shuttle provides services to Queenstown and Invercargill where transport availability is an issue.
- 2.38 The Te Anau Medical Centre receives funding from the Southern District Health Board to deliver:
- basic birthing facilities at Te Anau. For emergencies, expectant mothers rely on towns like Winton, since the downgrading of services previously provided at Lumsden.
  - first response services, which it delivers with St John's Ambulance. This involves doctors/nurses traveling with the ambulance to assess injuries in situ.
- 2.39 The Te Anau Health Centre has a pharmacy, however there is no late-night chemist service.

**EDUCATION**

- 2.40 There is a primary and a secondary school in Te Anau. Te Anau School has approximately 300 students with a growing role. According to its 20-year long-term plan, the school has the necessary land to support more facilities to meet the growing population. The school recognises that growth is currently constrained by housing availability with some families in recent times cancelling plans to move to Te Anau with their children due to challenges finding suitable housing. We heard from the headmaster that the school role growth is less dependent on workers in the tourism sector (i.e. tourism workers appear to be less likely to have children enrolled in local schools, than other families).
- 2.41 Fiordland College has a role of just over 200 and is a GreenGold Enviroschool, with a vision to becoming a Centre of Environmental Excellence, with Education for Sustainability embedded across the school curriculum and operation.

**WELLBEING SERVICES**

- 2.42 Fiordland Community House provides a range of contracted services, including employment, heartlands, family, counselling, advocacy and youth services. In addition, they run a range of programmes for the community, including the Community Health Shuttle service. The staff are kept busy with local demands and access funding from a variety of government and non-government sources. Given the likely demands of the tourism sector in the future, demand for these services can be expected to grow as visitor numbers grow.
- 2.43 The Southland District Youth Council undertook surveying in 2019 of local youth across the district which identified concerns about access to effective mental health and wellbeing services beyond the school system. Ninety-five percent of respondents felt accepted in their community. Sixty-eight percent felt safe to express their identity in their community. Fifty-seven percent of respondents did not think there are enough opportunities in Southland to express their identity.
- 2.44 Initial interviews with adults in the community indicate that more needed to be done to keep young people in Te Anau. The community-driven Fiordland Futures Plan<sup>2</sup> recognises that many of the young people who choose to return feel a strong connection with the community they grew up in. The plan says that providing the best childhood experiences is directly correlated to a desire to return at a certain point in time. Key objectives that the community have identified to encourage more to return to Fiordland include:
- develop services and activities that support mental health and wellbeing

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<sup>2</sup> This is a community-driven plan that seeks to work in partnership to achieve lasting change with the Milford Opportunities Project.

- identify opportunities to develop winter working opportunities, as well as summer jobs
- additional extra-curricular indoor activities
- promote multi-culturalism in the community
- plan strategically to promote the four well-beings, especially social wellbeing.

### COMMUNITY FACILITIES

- 2.45 Community facilities are facilities generally owned by the community and open to the public, whether for free or user-pays. Examples include public toilets, parks, playgrounds, signage, libraries and community halls.
- 2.46 According to the Fiordland Community Board Plan, residents' value that they live in a helpful, supportive and safe community with access to services and amenities such as schools, the health centre, library and a range of clubs and societies. Living in a safe environment means children can cycle to school, the elderly feel safe in their homes and that there is minimal crime.
- 2.47 There has been strong support for integrating Māori public artwork into the town centre's design, with a recent unsuccessful attempt to fund a waharoa (gateway) carving at the entrance to Te Anau.
- 2.48 There is no marae in Te Anau and cultural activities are often undertaken in community spaces where it is difficult to develop a sense of place consistent with mana whenua values and aspirations according to interviews with local Māori. The community is becoming increasingly aware of the contribution local hapū are making to cultural awareness in the area.
- 2.49 Through our engagement on Chapter 3 Mana whenua Values and Aspirations and with whānau Māori in Te Anau, there is a desire for a dedicated space to celebrate Māori culture. To fulfil the ambitions of the masterplan that align with the Treaty of Waitangi. Boosting the role of local Māori will support employment opportunities and the development of the local community to deliver a consistent visitor experience that effectively celebrates the unique cultural history and respects tikanga Māori.
- 2.50 Due to growing visitor demand and the council's asset management commitments, there are a significant number of parks that are expected to receive upgrades over the next eight years. In Te Anau and Manapōuri, these include:
- Supply of water to Lions Park Barbeque area and a public fountain
  - Walkway and new tracks in the Water Park area
  - Town entrance signs
  - Lakefront Trail to Upukerora Mouth
  - Improved links to Te Anau - Manapōuri trail and Lakefront trail
  - Events centre walkway to CBD.
- 2.51 There are ample public toilet facilities in Te Anau, including in the town centre, at Ivon Wilson Park, Te Anau Lions Park and the Te Anau Boat Harbour. There are toilets at Frasers Beach and Pearl Harbour in Manapōuri. The boat harbours in Te Anau and Manapōuri have dump stations. Along the Southern Scenic Route towards Invercargill, there are 23 toilets open for regular public use and one dump station at Tuatapere. There are no plans for any new toilet facilities in response to growing visitor demand, although the Te Anau Boat Harbour Toilets area is scheduled for an upgrade.
- 2.52 Organisations like Rotary and the Lions as well as sports clubs significantly contribute to the quality of community facilities currently available in Te Anau and its surrounds. Therefore, beyond

the rating base, volunteer labour is a significant factor in the capability of these organisations to support the enhancement of public facilities in Te Anau. Key child and youth agencies operating in the area include:

- Fiordland College and Te Anau School (which provides public access to the swimming pool)
- Te Anau Sea Scouts
- Kids Restore the Kepler
- Fiordland Kindergarten
- Fiordland Community Events Centre.

2.53 Te Anau has the Vintage Machinery Museum and the privately owned Fiordland Military Museum. The community have supported the development of a new Te Anau Museum at the Alpine Centre Café and Bar; however this is yet to be built.

### **VISITOR ACCOMMODATION<sup>3</sup>**

2.54 The summer season brings an influx of tourism and crib-owners and visitors that support the local economy. The Fiordland Community Board Plan identifies the availability of rental accommodation, affordable housing and social/emergency housing as challenges for the Fiordland area.

2.55 Engagement with the Business Tourism Reference Group emphasised that the availability of accommodation and commercial activities in Te Anau over the summer period is oversubscribed and the area struggles to attract investment that would build capacity. Te Anau is often overlooked by hotel developers when compared with Queenstown which has attractions over winter and summer. The Business and Tourism Reference group stated that many of the larger hotel and motel developers are already heavily invested in Queenstown and are likely to be concerned that new facilities in Te Anau will cannibalise revenue in Queenstown. Uncertainty was also expressed due to the numerous alternative Queenstown-Milford links that have contributed to a reluctance to commit to further investment.

2.56 The Department of Conservation has 10 camping sites that are well utilised and provide a good level of service. The Park User Reference Group highlighted that these need to be managed better. Currently, these sites are overrun over the summer. The revenue obtained (e.g. \$15 for an adult at Cascade Creek) is unlikely to cover the costs of monitoring, servicing rubbish bins and toilets.

2.57 The commercial camping facilities in Te Anau and Manapōuri have diversified their offering to charge more and provide greater value for their customers. The Top10 Holiday Park in Te Anau has seen an increase in use by families who are easier to manage and contribute to a positive visitor experience. When we spoke to the holiday park, they were supportive of encouraging more camping opportunities along Milford Road.

### **LOCAL ACCOMMODATION**

2.58 Feedback received from employers in Te Anau has included experiences of struggle to retain staff, largely due to a lack of suitable accommodation options. In some cases, over the summer break (e.g., when house owners want their houses for use over the Christmas holiday period), staff are having to find temporary accommodation arrangements, or are shifting out of the district.

2.59 Some businesses provide subsidised accommodation for their staff. However, many of these staff only take up residence in such facilities (which are often heavily discounted) for short periods. As

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<sup>3</sup> Visitor accommodation is covered in Chapter 12 Customer journey mapping and typologies.



workers develop personal relationships they seek to live elsewhere in flatting arrangements, in other houses which are in short supply.

- 2.60 Key elements of the challenges associated with accommodating staff relate to the red-tape challenges of establishing new accommodation provision, including:
- it is easier to set up an Airbnb than it is to offer a rental due to insulation requirements (under the tenancy act requirement)
  - The requirement for 'change of use' (resource and building) consents, requires technical expertise that is not readily available in Te Anau
  - Parking requirements in the district plan.

### LAND TRANSPORT

- 2.61 Te Anau and Manapōuri are connected by State Highway 95. To get to Te Anau by car/bus from Central Otago, State Highway 94 is predominantly used with townships like Mossburn enjoying commerce from vehicles accessing Fiordland coming from State Highway 6 which connects Southland and Otago. This is the primary route for tourism traffic by bus, campervans and cars.
- 2.62 The Southern Scenic Route (encompassing Blackmount-Clifden Road, Orepuke-Tuatapere Roads and State Highway 99) connects the south-east of Southland with Te Anau. State Highway 96 merges with the Southern Scenic Route at Clifden, connecting Ohai, Nightcaps and Winton to settlements in the east.
- 2.63 Analysis of transport accidents associated with tourism traffic is discussed in more detail in Chapter 4 Transport and Access. The following describes a more localised view of the local transport network's safety performance to understand the baseline for Te Anau<sup>4</sup>.

- 2.64 Between 2010 and 2020 there have been five deaths within the basin area, all on state highways. One of these deaths was on State Highway 95 between Te Anau and Manapōuri, the remainder were on SH94. There were 35 severe crashes, mostly on the state highway network (77%).

- 2.65 Within the local Te Anau transport network there were four severe crashes. Analysis of these incidents showed three were on State Highway 94 and three were close to the intersection with Govan Drive.

### PUBLIC TRANSPORT

- 2.66 Te Anau residents are largely dependent on private vehicle travel with no local public transport bus services operated by local authorities.
- 2.67 There are limited private ferry and taxi services in Te Anau, with the Kepler Water Taxi and Te Anau Taxi Transfers being the notable exceptions. There are also commercial bus services and a community shuttle service run by the Fiordland Community House with help from volunteers runs Monday to Friday to Invercargill by appointment running between Invercargill, Queenstown and Milford Sound Piopiotahi.

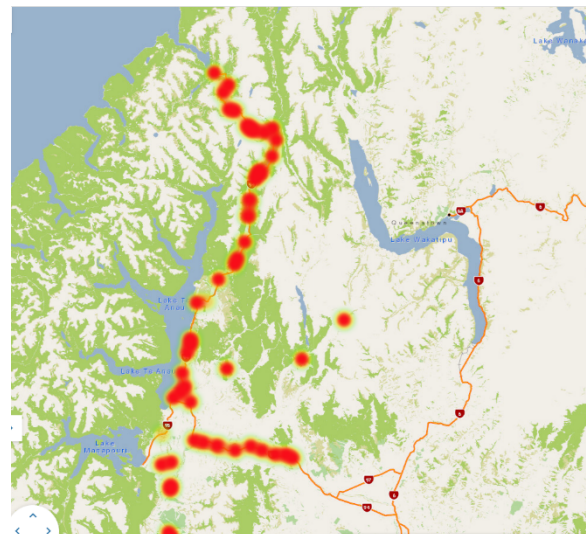


Figure 4 Deaths and Serious Injuries 2010-2020 (Source: Waka Kotahi CAS data)

<sup>4</sup> And excludes injuries on farms and reserves.

**PARKING**

- 2.68 The Business and Tourism Reference group emphasised that parking in the Te Anau Town Centre is often a challenge with a lack of parking facilities. During the flooding event in early 2020, access into Milford Sound Piopiotahi was restricted to busses. Existing park and ride facilities, including the fully consented Kiwi Country in the town centre met that demand with ample additional capacity.

**CYCLING**

- 2.69 The Fiordland Trails Trust focuses on developing accessible trails (for riders of all abilities). These trails enable access for ongoing noxious weed and pest eradication to the trail corridor and beyond and are maintained using a sustainable, locally driven model, with support from the Department of Conservation and the Southland District Council, in addition to locally run fundraising events. Popular cycle and walking trails that have been developed or significantly progressed by the Fiordland Trails Trust, include:
- Construction of 24.5km of the Lake2Lake Trail (total length 28.5km) which has seen high utilisation with 45,000 annual users at its busiest point and 9,000 at its most remote point.
  - 3km of the 32km Lakeside (Te Anau to Te Anau Downs) Trail completed.
  - Consenting for and Construction contracting of a further 14km to the Fiordland National Park boundary well advanced.
- 2.70 Future projects include: the Southern Lakes Cycle Trails Network – connecting via road and ferry trails; the proposed Waiiau to Hidden Lakes trail, Lakeside Te Anau to Te Anau Downs, Manapōuri to the Key, Te Anau to Mavora Lakes and the existing Around the Mountains cycle trail connecting Kingston, Mossburn, Mavora and Walter Peak.
- 2.71 Te Anau Cycling Incorporated is another cycling club in the district with a focus on mountain bike trails, organising community events and developing tracks, such as the Mavora Lakes ride. This group would like to see greater access for mountain bikes into the national park, utilising existing trails in a way that is potentially more sensitive to the environment. They point to the use of the Heaphy Track during the shoulder season by mountain bikers as a great way to boost tourism activity in an otherwise quiet period of the year.
- 2.72 The 2014 Te Anau and Environs Cycling Opportunities Study funded by Great South, Invercargill City Council, Southland District Council, Gore District Council and Environment Southland recommended that work be done to develop the wider Te Anau area while it wait for the Fiordland National Park to be reviewed and facilitate the development of a Fiordland cycleway network. The short to medium-term focus recommended by the report included upgrading existing tracks, changing infrastructure around Te Anau and Manapōuri to make it more cyclist-friendly, and building a track between Queens Reach and Rainbow Reach, although a connection with the Te Anau-Manapōuri Cycleway may be more valuable (according to the Fiordland Trails Trust).
- 2.73 The Fiordland Community Board plan to develop a plan for cycling & pedestrian safety through Fiordland townships working with Waka Kotahi and other partners.
- 2.74 There are a number of businesses in Te Anau who lease bicycles and some accommodation providers provide access to bicycles for free. This type of offering has grown organically and could be expected to grow rapidly as cycle tourism in the area grows in response to the proposed day rides proposed along the corridor in the masterplan.
- 2.75 The National Cycling Strategy proposes a route connecting Te Anau to Invercargill and a new route between the Hollyford River and Haast. The Ngā Haerenga The New Zealand Cycle Trail Board have indicated they will support the development of the national cycleway network in Fiordland and would support the development of a Heartland (day trip) ride through their strategy.

**AIR SERVICES**

- 2.76 The Te Anau Airport, located between Manapōuri and Te Anau is owned and operated by the Southland District Council. It offers a range of services as a regional airport, mostly connecting with Queenstown Airport. There are five commercial aviation companies flying frequent services to/from Te Anau, including one float plane, that uses Lake Te Anau.
- 2.77 The asset management plan shows that the airport is well managed. The terminal is utilised as a venue for private parties, such as weddings. Commercial hangar space is available as the airport diversifies its commercial offering and partners with industry seeking to park planes outside of other airports, including Invercargill and Queenstown where storage is at a premium.
- 2.78 There is very little interoperation with the Milford aerodrome currently, however, if there are changes in the future at the aerodrome, Te Anau Airport is well-positioned to play a more active role in supporting tourism.

**MARINA, WHARVES AND JETTIES**

- 2.79 The community has two high quality boat facilities, with the Te Anau Boating Club being the more modern facility, with 150 berths up to 12.5 meters in length and launching ramp facilities that can cater to up to three simultaneous trailer boats. The site is managed by the community-run Te Anau Boat Club.
- 2.80 At Manapōuri, the Pearl Harbour facility is owned and managed by Meridian Energy. The Manapōuri Boat Club has its own facilities further down the Waiau River.
- 2.81 The intersection of Town Centre and Lakefront Drive is the prime location for integrating the lake with the town centre, however this space has been privatised by the Real Journey Visitor Centre. The Fiordland Community Board is expected to undertake work to activate the link between the lake and the town centre through tactical urbanism to help inform the future redevelopment of the town centre.
- 2.82 In addition to the wharves discussed above there are two consented jetty connecting the Te Anau Glow Worm Caves and the Hidden Lakes. The Milford Sound Piopiotahi boat ramp is unmanaged but is a popular destination for Te Anau residents accessing the fiords with private boats. According to stakeholders, the facility functions well, with access to boat trailer parking an occasional challenge over the peak period.

**WATER SUPPLY, WASTEWATER AND STORMWATER MANAGEMENT<sup>5</sup>**

- 2.83 According to the Southland District Council's Asset Management Plans, demand for water supply, wastewater and stormwater services in the area is not expected to change significantly over the coming decade. Continued growth in the Te Anau townships is expected. At current rates it is anticipated that current infrastructure will be capable of dealing with this growth.
- 2.84 In addition to the recently consented Te Anau wastewater scheme (a subsurface drip irrigation system), planned capital expenditure for wastewater infrastructure has been deferred to the final years of the council's Long-Term Plan 2018-2048. An element of the Te Anau upgrade will be attributed to demand though this has been scaled back significantly from previous estimates due to lower than anticipated growth.
- 2.85 Improvements to the Te Anau reticulated stormwater network are not anticipated for the next 30 years, although the network is generally considered to be aged and in need of upgrade. The industrial area in particular has issues with its water supply network with leaks unable to be cost effectively identified and repaired due to the alluvial soils which make detection difficult.

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<sup>5</sup> Three water infrastructure management is covered in Chapter 5 Infrastructure Assessment

**CIVIL DEFENCE AND EMERGENCY MANAGEMENT<sup>6</sup>**

- 2.86 In earlier engagement with stakeholders, including search and rescue volunteers, it was found that these services play an important role in managing visitor safety. The higher risk posed by natural hazards, the remoteness and inaccessibility of much of Fiordland and the volume of people visiting the area during peak season have resulted in a strong network of volunteers and infrastructure.
- 2.87 There are seven community emergency hubs available to planners if an emergency strikes. Fiordland College grounds provide space for evacuations whilst operations are managed from the operations centre near town. The Te Anau Community Response Plan estimates that the accommodation sector in Te Anau has capacity for 4,000 visitors. During peak season there are few vacancies. According to an interview with a search and rescue volunteer, the existing operations Centre in Te Anau has performed well, although the facility would benefit from improved power supply redundancy.
- 2.88 Communications technology is adequate throughout Fiordland and operators use their own private networks and are able to coordinate with search and rescue network operators. Plans to roll-out broadband will improve connectivity for visitors.
- 2.89 The Fiordland Community Board plan to work with emergency management services to deliver civil defence preparedness workshops and raise awareness of the known risks within the local community and to support better preparedness for the visitor community.

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<sup>6</sup> This topic is covered in detail in Chapter 10 Hazards and Visitor Risks

### 3 RESEARCH DESIGN AND METHODS

- 3.1 This study involved consultation and engagement with the local community through a survey research design. Survey research allows the gathering of opinions from a large number of people. This also enables the measurement of residents' perceptions on issues such as the social impacts of tourism.
- 3.2 The methodological process for this study is illustrated in Figure 4. The first stage entails the development of a social impact assessment framework. The second stage includes the collection of data from respondents. The third stage involves quantitative and qualitative data analysis. Finally, the fifth stage outlines the recommendations based on a synthesis of findings.

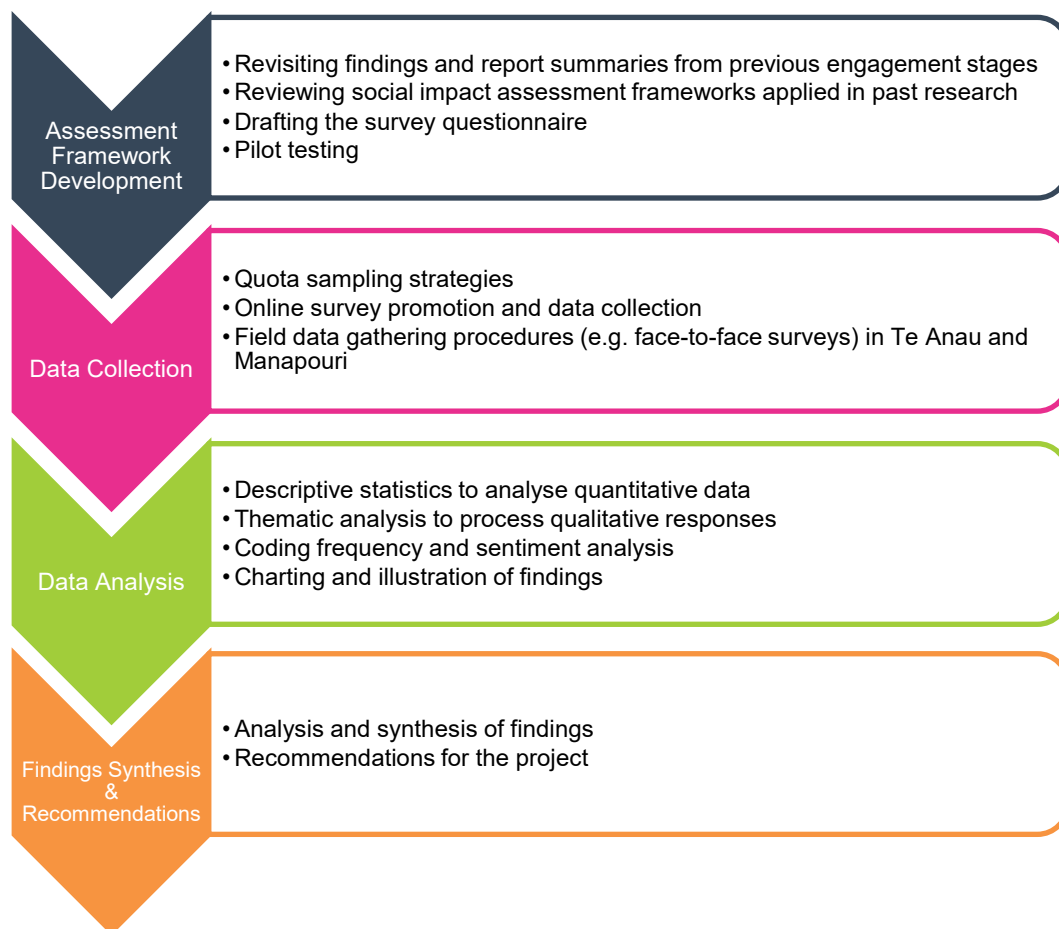


Figure 5. Methodological process designed and implemented for the Te Anau Basin Study

#### SOCIAL IMPACT ASSESSMENT FRAMEWORK

- 3.3 The goal of the inquiry is to canvass the views of residents in and around Te Anau regardless of their involvement in tourism. Doing so complements earlier engagement with stakeholders representing various sectors involved in the local visitor economy (e.g., community boards, aviation, national park users, tour operators).
- 3.4 A social impact assessment framework was developed to address the study aims and objectives. This framework was transformed into a survey questionnaire entitled *Te Anau Residents Survey: Impacts of Tourism on the Community* (see Appendix 2).

## FRAMEWORK DEVELOPMENT

- 3.5 The development of the assessment framework involved:
- reviewing past stakeholder consultation and engagement summaries;
  - referring to social impact of tourism studies published in academic journals;
  - listing questionnaire items; and
  - validating and pilot testing the survey.
- 3.6 Firstly, the MOP Gap Analysis and Reference Groups meeting summaries were reviewed. All mentions of Te Anau and relevant tourism-related issues were identified. At this stage, the potential social impacts of tourism as communicated during past engagement stages were mined and listed as potential survey items.
- 3.7 Secondly, the project team referred to the academic literature to review the most commonly occurring social impacts of tourism. During which, the relevant social impacts that may also happen in Te Anau if it is developed as a tourism hub were identified in conjunction with those mentioned in past stakeholder engagement.
- 3.8 Thirdly, the items included in the survey questionnaire were listed. Following the first two steps, 12 survey items were considered in the assessment framework (see Table 1. Social impact assessment framework). These survey items were measured using a five-point Likert scale: from “1 = Strongly disagree” to “5 = Strongly agree.”

Table 2. Social impact assessment framework

Impacts	Reference Groups <sup>a</sup>	Academic literature <sup>b</sup>
Improve my income and standard of living	✓	✓
Increase local employment opportunities	✓	✓
Increase the cost of living		✓
Diversify recreational activities	✓	✓
Improve recreational facilities and infrastructures (e.g., cycling trails, parks)	✓	✓
Increased support for nature conservation	✓	✓
Opportunity to tell the story of the whenua	✓	
More crowding in public spaces	✓	✓
Worsen traffic conditions	✓	✓
Enhance the community’s sense of pride		✓
Maintain original lifestyles		✓
Improve the quality of life in general		✓

Notes:

- Environmental Reference Group Minutes dated 29 July 2020; and Appendix 6C of Consolidated Reference Group Feedback on Shortlist*
- Ap (1990), Milman and Pizam (1988) and Zhang et al.’s (2020) research (see References)*

- 3.9 Additional survey questions were populated based on the study objectives. These questions were designed to capture respondents’ demographic profile and tourism involvement (see Part 1 of Appendix 2: Te Anau Residents Survey: Impacts of Tourism on the Community); perceptions of

tourism’s short-term and long-term social impacts, support for tourism, ideas for infrastructure and services that could be developed to accommodate tourism growth, and their views on the acceptable form of tourism development on the community.

- 3.10 Fourthly, the draft survey questionnaire was validated by the MOP programme manager and team members from other workstreams. The questionnaire was hosted on an online platform and was pilot tested by the project team members (see Appendix 2: Te Anau Residents Survey: Impacts of Tourism on the Community). The survey questionnaire items and how these align with the study objectives are shown in Table 3.

Table 3. Study objectives and survey items

Study objectives	Survey items
Identification of the potential opportunities and impacts for the Te Anau Basin of increasing visitor numbers.	Part 2 <ul style="list-style-type: none"> <li>12 rating scale items measuring perceptions of tourism’s social impacts (see Table 1)</li> </ul>
An assessment of the social and infrastructure needs in the Te Anau Basin to support increased visitor numbers.	Part 4 <ul style="list-style-type: none"> <li>Open-ended question asking for residents’ ideas of infrastructure to support tourism development</li> </ul>
Identification of the type/style of development that is most acceptable (to the local community).	Part 3 <ul style="list-style-type: none"> <li>Rating scale measuring residents’ support for tourism (“1 = strongly oppose” to “5 = strongly favour”)</li> <li>Rating scale asking residents’ opinions on visitor numbers pre-COVID-19 (“1 = significantly reduced” to “5 = significantly increased”)</li> </ul> Part 4 <ul style="list-style-type: none"> <li>Open-ended question asking for residents’ ideas on type/style of tourism development</li> </ul>
Identification of the critical social values and infrastructure requirements that planning for increasing visitor numbers will need to address on the timescales of 3, 10-15, and 25 years.	Part 3 <ul style="list-style-type: none"> <li>Open-ended question asking for residents’ perceptions of the long-term impacts of tourism</li> </ul> Part 4 <ul style="list-style-type: none"> <li>Open-ended question asking for residents’ ideas of infrastructure to support tourism development</li> </ul>

- 3.11 To be consistent with the overall rationale of the MOP, note that the survey questions were contextualised in tourism development to Te Anau prior to the COVID-19 pandemic (e.g. visitor influx and growth rate).

## SAMPLING AND DATA COLLECTION

- 3.12 The respondents of this study are residents of Te Anau and nearby areas. Convenience sampling strategies were performed to select respondents. These strategies allowed flexible selection of respondents through online and face-to-face approaches.
- 3.13 Considering COVID-19 impacts have caused many locals to leave Te Anau through 2020, it might mean that the 2018 census data are not entirely relevant. To widen the sampling coverage and representativeness of the sample, a mixed-mode survey questionnaire was used. The mixed-mode survey was facilitated through online and face-to-face methods in the study area from 9–28 February 2021.
- 3.14 Online data collection was facilitated for this study. The survey was advertised on the MOP website and social media accounts, and posted on Facebook community pages, namely *Fiordland*

*Community Board and Te Anau Community Information.* This method enabled the collection of responses from those having access to online channels.

3.15 Field data collection was also performed in conjunction with the online method. The project team travelled to Te Anau and conducted face-to-face surveys from 22–25 February 2021. Residents visiting public spaces (e.g. supermarkets, parks, post shops, pharmacy) were approached and invited to participate in the survey. This method enabled the elicitation of opinions from the general public not reached by online channels. A total 300 members of the public were personally approached during fieldwork; 66 of these individuals agreed to answer the survey *in situ* through an interview format (22% response rate). Flyers were given to residents who were willing to participate in the survey but had no time for an interview when approached.

3.16 The survey was also advertised using flyers and posters showing a QR code and link to the survey. To reach a wider audience, posters were pinned on announcement boards located in various public spaces in Te Anau and Manapouri, including the public library, community centre, pharmacy, supermarkets, hardware, cafes, gym and laundromat.

3.17 To expand the sampling coverage, businesses and their staff – who also are Te Anau Basin residents – were invited to participate in the survey. Note that some of the businesses surveyed were not necessarily tourism related. Therefore, this allowed a diversity of perspectives to be considered in the analysis.

3.18 On average, the online survey takes 5–10 minutes to be completed. However, the face-to-face method followed a structured interviewing style where respondents can express opinions that build from the survey items (e.g., through asking follow-up questions). As a result, face-to-face surveys ran between 15 minutes to one hour depending on the respondent. Responses not directly addressing survey questions were recorded as field notes.

3.19 In total, 297 individuals responded to the survey, either partially or fully. After data cleaning, a total of 225 responses were valid. Of these, 194 survey responses qualified in the final sample. With this sample size, the margin of error is 7% and the confidence level is 95%; these parameters are acceptable in exploratory social science research<sup>7</sup>. Also, the mixed-mode survey design ensured that all possible channels to reach the community were utilised to increase the representativeness of the sample.

## DATA ANALYSIS

3.20 The survey was designed to collect both quantitative and qualitative data. Different approaches were performed to analyse this information.



Figure 6. Poster/flyer distributed during field data collection.

<sup>7</sup> Dillman, D. A., Smyth, J. D., & Christian, L. M. (2014). *Internet, phone, mail, and mixed-mode surveys: the tailored design method* (4th ed.). Hoboken, New Jersey: Wiley



- 3.21 Numerical information was gathered from nominal variables – *residency, age group* and *awareness of the MOP* – and ordinal variables – *level of tourism involvement, perception of social impacts, support for tourism* and *opinions of visitor numbers pre-COVID-19*. Descriptive statistics were performed on these variables using the Statistical Package for the Social Sciences (SPSS). Frequencies, percentages, and mean and standard deviation values were calculated for to analyse numerical variables.
- 3.22 Thematic analysis was conducted to synthesise qualitative responses to the open-ended questions. Using NVivo 12 – a computer-assisted qualitative data analysis software – the following steps were performed:
- Familiarisation with the data – reading the responses and reviewing field notes
  - Coding – assigning short labels (e.g., codes) into responses
  - Generating initial themes – examining initial codes, delineating patterns in the data and clustering codes into candidate themes
  - Reviewing themes – refining candidate themes, and checking the relevance of the findings in each study objectives
  - Defining and naming themes – determining the scope and focus of themes and providing clear descriptions for each theme.
- 3.23 In addition to the above qualitative analysis procedures, the coding frequencies were calculated to show the most commonly occurring responses per question. This method was helpful in identifying popular opinions and suggestions for tourism and infrastructure development in the area.
- 3.24 Sentiment analysis was also conducted for each open-ended question. This analytical approach categorises and quantifies the responses depending on individual sentiment: negative, neutral, positive. This was helpful in delineating the general public’s ‘mood’ towards tourism development.

## 4 SOCIAL IMPACTS OF TOURISM

4.1 The primary aim of this study is to understand the social appetite for enhancing the Te Anau Basin as a tourism hub and increasing the numbers of visitors to the area. To achieve this aim, it is vital to explore the local community’s perceived social impacts of tourism. This chapter presents the first part of the survey findings. Initially, this chapter outlines the survey respondents’ profile. Thereafter, the local community’s perceived social impacts of tourism measured using the assessment framework are discussed. The qualitative analysis of residents’ statements about their perceived long-term impacts of tourism in the area are then discussed.

### RESPONDENT PROFILE

4.2 In total, 194 respondents qualified in the sample. The majority of the respondents live in Te Anau (92.3%). Participants living nearby come from Manapouri and surrounding areas (e.g. 15-minute drive from town). Most respondents are long-term residents of Te Anau, living in the area for more than five years (81.4%). Therefore, it can be suggested that most study participants have a strong familiarity of the area and its tourism. Only 4.1 percent are living in Te Anau Basin for less than two years.

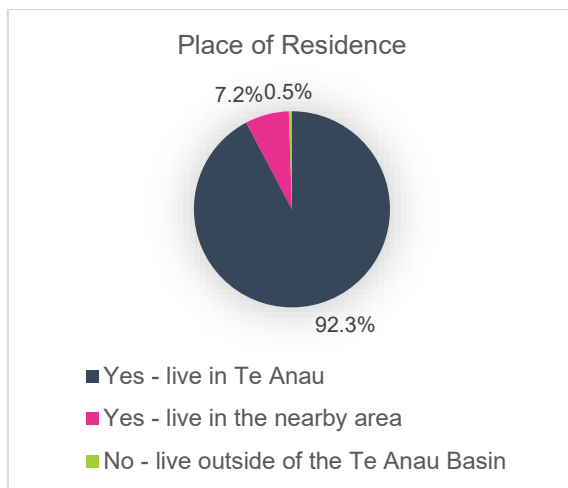


Figure 7. Respondents’ place of residence (N=194)

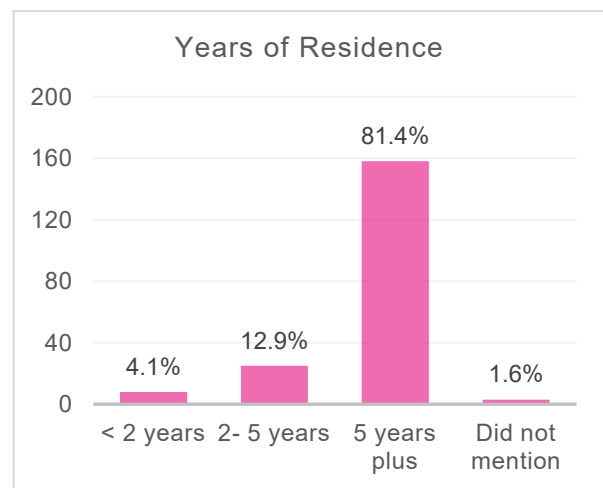


Figure 8. Respondents’ years of residency in Te Anau Basin

4.3 In terms of age, most participants are aged above 30 years old (see Figure 9. Respondents’ age group distribution): 30-39 (18.6%), 40-49 (21.1%), 50-59 (25.3%), and 60 plus (25.8%) years old. The distribution of the sample by age reflects the 2018 Te Anau census data where most residents are aged 30 to 64 years old (see Appendix 1: The People of Te Anau); this suggests representativeness of the sample.

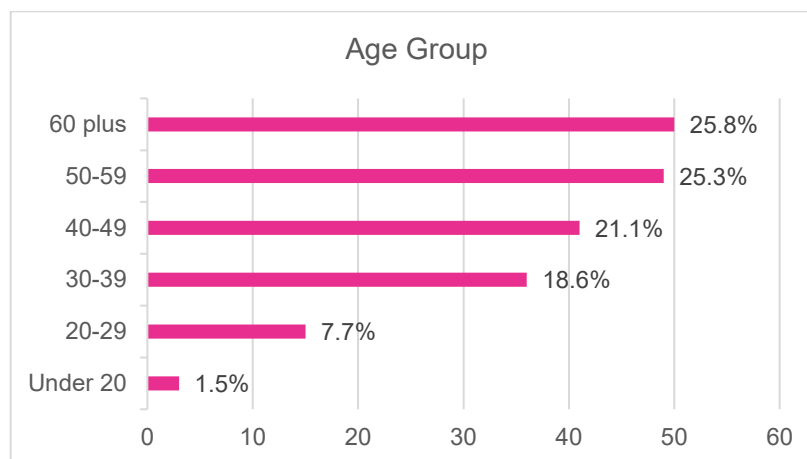


Figure 7. Respondents’ age group distribution

4.4 The majority of the respondents are aware of the MOP (64.4%). However, only 49 respondents (25.3%) have previously participated in earlier research and engagement stages of the project. Therefore, this survey offered an opportunity for residents to have their voices heard regarding the project for the first time.

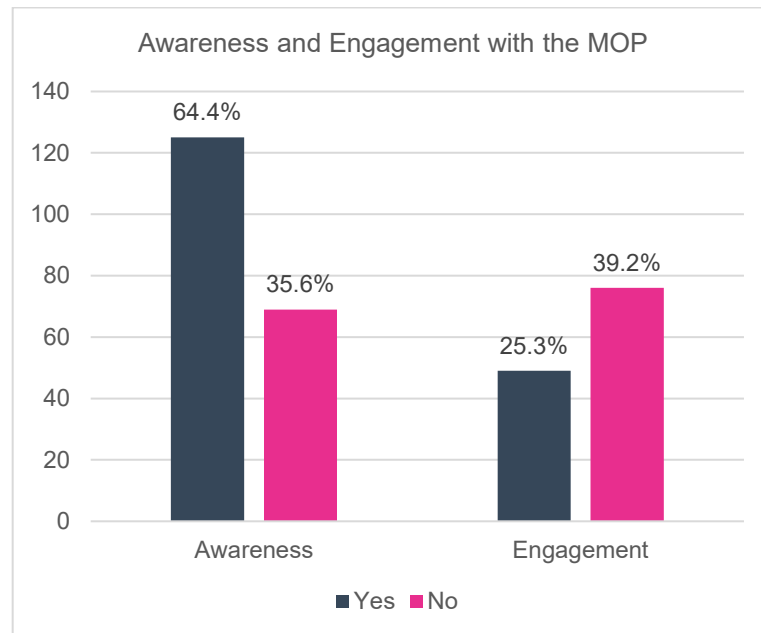


Figure 8. Respondents' awareness of and previous engagement with the MOP

4.5 About 60 percent of the respondents indicated they were involved in tourism pre-COVID-19 (see Figure 11. Respondents' level of involvement in tourism): highly involved (39.7%) and involved (19.6%). Since the local economy of Te Anau is dominated by tourism and hospitality, it can be implied that the sample was able to capture the voices of residents who are part of the local tourism workforce.

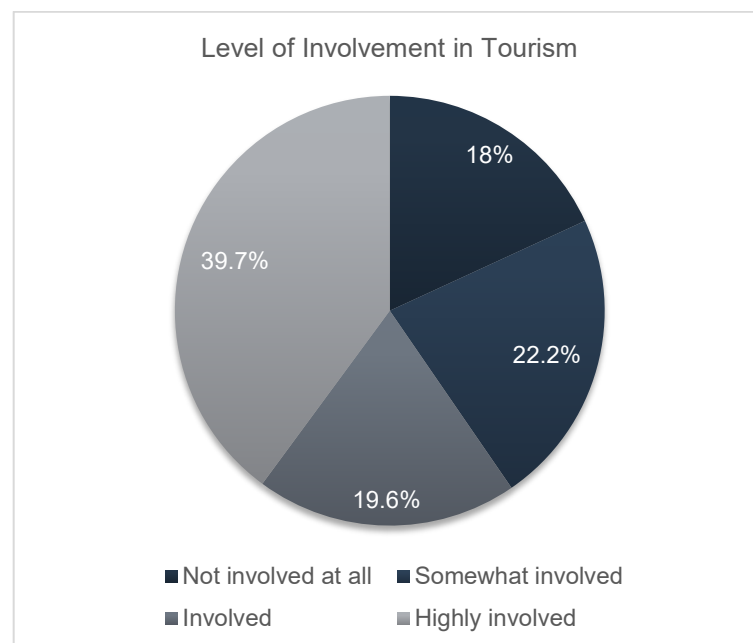


Figure 9. Respondents' level of involvement in tourism

4.6 Appendix 3: Respondents' Involvement in Tourism Pre-COVID-19 and at Present shows a diversity of the types of involvement the respondents had prior to the pandemic and during the

time of the study. This means the study was able to uncover the opinions of individuals working in the various sectors of Te Anau’s visitor economy.

## RESIDENTS’ PERCEIVED SOCIAL IMPACTS OF TOURISM

- 4.7 This study measured residents’ perceptions of tourism’s social impacts based on 12 pre-defined impact statements (see Table 1. Social impact assessment framework). These statements or survey items were rated by respondents using a five-point scale (1 = “Strongly disagree” to 5 = “Strongly agree”), assuming pre-COVID-19 tourism numbers and circumstances applied<sup>8</sup>. To analyse how these survey items were rated in general, the average scores (mean values) per statement were calculated and rank-ordered (see Table 3. Overall rating of social impact statements ranked from highest to lowest).

Table 4. Overall rating of social impact statements ranked from highest to lowest

Rank	Impacts	M <sup>a</sup>	SD	N
1	Increase local employment opportunities	4.37	0.88	194
2	Improve recreational facilities and infrastructures	4.11	0.92	194
3	Worsen traffic conditions	3.99	1.04	194
4	More crowding in public spaces	3.98	0.92	194
5	Diversify recreational activities	3.80	0.92	193
6	Increased support for nature conservation	3.70	1.04	194
7	Enhance the community’s sense of pride	3.70	1.07	194
8	Opportunity to tell the story of the whenua	3.67	0.91	194
9	Improve my income and standard of living	3.67	1.15	192
10	Improve the quality of life in general	3.57	1.11	192
11	Increase the cost of living	3.48	1.00	193
12	Maintain original lifestyles	3.31	1.09	194

Note:

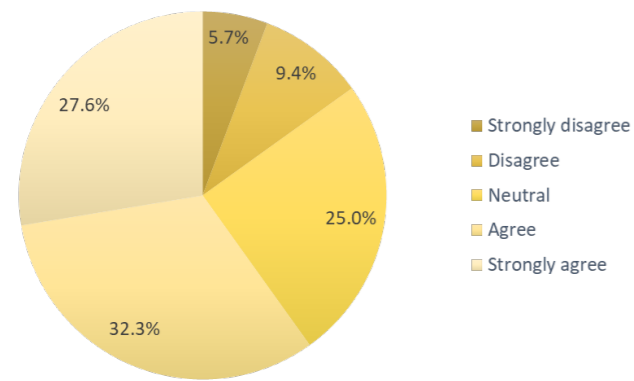
<sup>a</sup>1 = “Strongly disagree” to 5 = “Strongly agree”

- 4.8 Of the 12 survey items, *Increase in local employment opportunities* ( $M = 4.37$ ,  $SD = .88$ ) and *Improve recreational facilities and infrastructures* ( $M = 4.11$ ,  $SD = .92$ ) were the most highly-rated positive impacts perceived by respondents, if Te Anau is enhanced as a tourism hub. However, following these top two statements are the most highly-rated negative impacts, namely *Worsen traffic conditions* ( $M = 3.99$ ,  $SD = 1.04$ ) and *More crowding in public spaces* ( $M = 3.98$ ,  $SD = .92$ ).
- 4.9 Those with the lowest average scores – rated between neutral and agree – amongst the measured social impact statements are *Increase the cost of living* ( $M = 3.48$ ,  $SD = 1.00$ ) and *Maintain original lifestyles* ( $M = 3.31$ ,  $SD = 1.09$ ). Mixed opinions were given to these statements mainly because enhancing Te Anau as a tourism hub will produce changes in local life.
- 4.10 The following section illustrates the rating distribution across the scale for each social impact statement. Thereafter, the findings of the rating distribution based on frequency analysis are discussed.

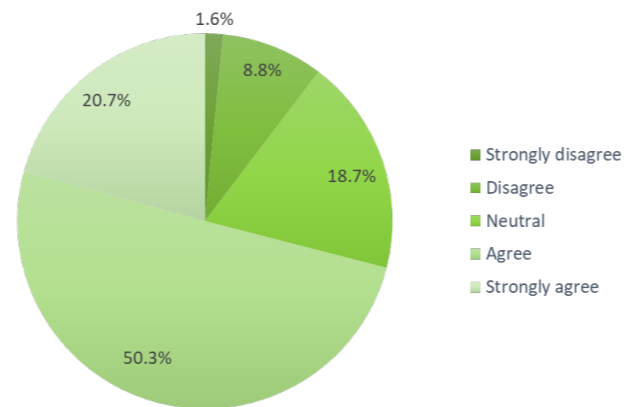
<sup>8</sup> In the survey questionnaire, respondents were asked “What do you think the social impacts would be from increasing the numbers of visitors to Te Anau further (to higher levels than those PRE-COVID-19)?”

# Residents' Perceived Social Impacts of Tourism in Te Anau Basin

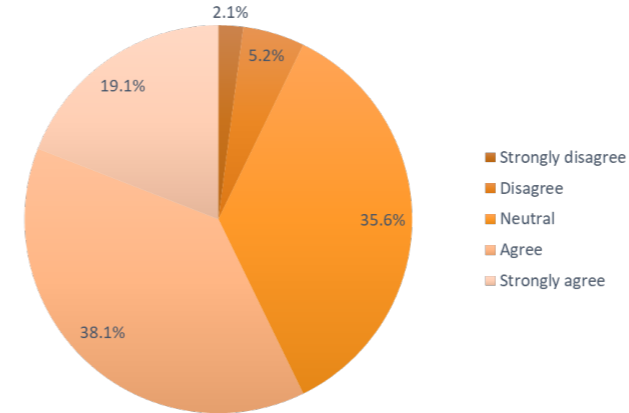
Increase my income and standard of living



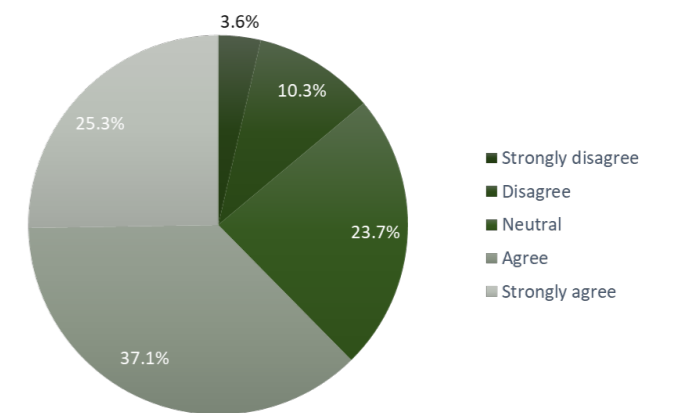
Diversify recreational activities



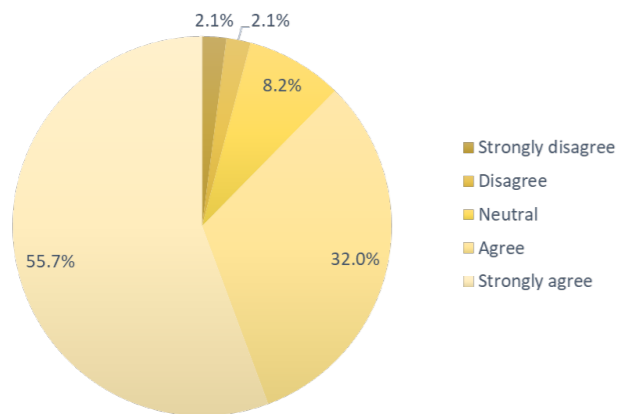
Opportunity to tell the story of the whenua



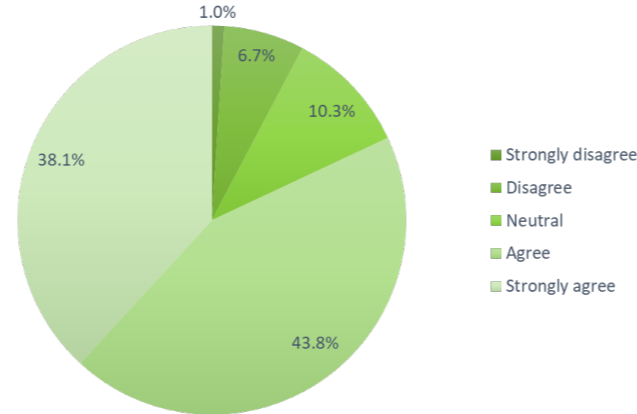
Enhance the community's sense of pride



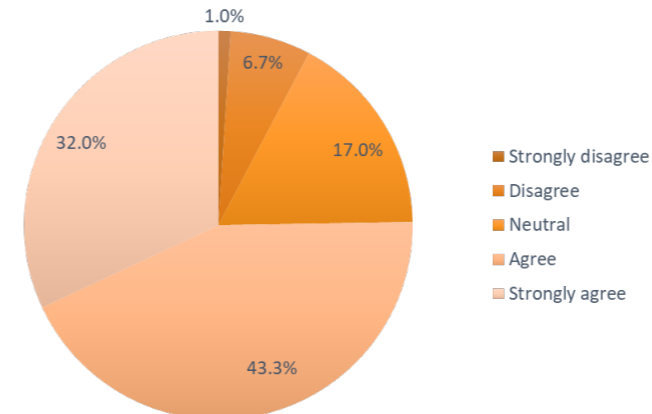
Increase local employment opportunities



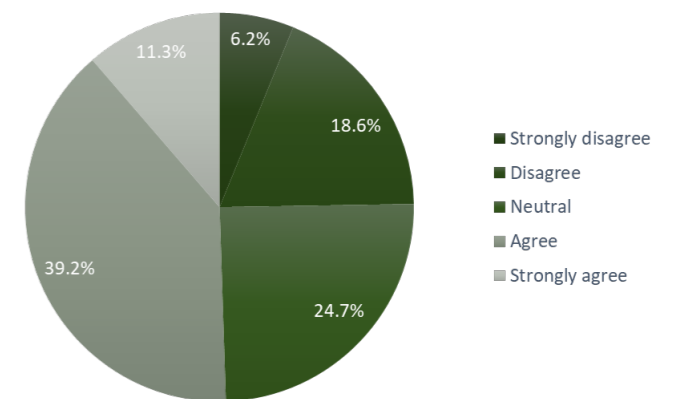
Improve recreational facilities and infrastructure



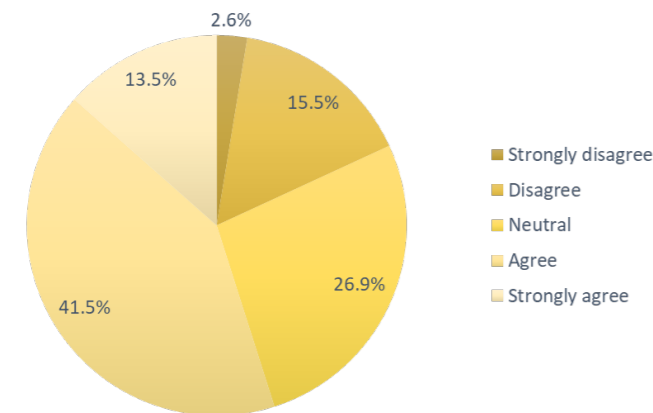
More crowding in public spaces



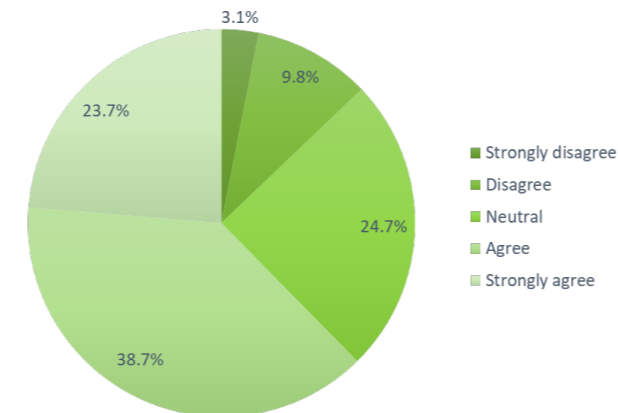
Maintain original lifestyles



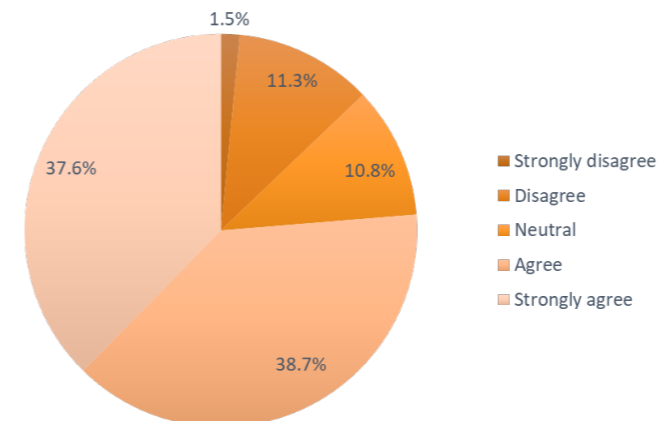
Increase the cost of living



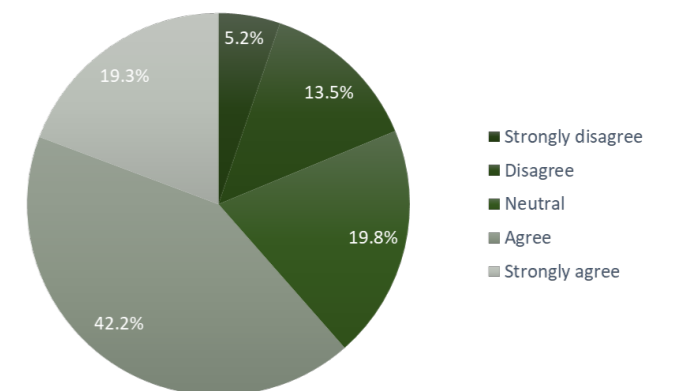
Increased support for nature conservation



Worsen traffic conditions



Improve the quality of life in general



- 4.11 The first set of items can be understood to fall under the economic aspect of the community. Given that the local economy of Te Anau is largely composed of tourism expenditures, most respondents either agree (32.3%) or strongly agree (27.6) that their income and standard of living will improve if tourism in the community is enhanced. In relation, there was a strong level of agreement that local employment opportunities will increase (55.7% strongly agree and 32% agree). However, the majority of the respondents also indicated an *Increase in the cost of living* (41.5% agree and 13.5% strongly agree) if Te Anau is enhanced as a tourism hub.
- 4.12 Following these are survey items that measured perceptions towards leisure and recreation for locals. Overall, the respondents anticipate:
- a diversification of recreational activities (50.3% agree and 20.7% strongly agree); and
  - an improvement of recreational facilities and infrastructure (43.8% agree and 38.1% strongly agree).
- 4.13 In terms of environmental benefits, the majority either agree (38.7%) or strongly agree (23.7%) that there will be an *Increased support for nature conservation*. Conversely, about a quarter of the respondents (24.7%) have a neutral opinion about this outcome. This finding indicates that tourism should have genuine goals for the environment.
- 4.14 The residents were also asked if tourism will provide an *Opportunity to tell the story of the whenua*. Although there are high levels of agreement (38.1% agree), there is an almost equal level of neutral views on this outcome (35.6% neutral). Therefore, tangata whenua must be strongly embedded in the visitor experience in Te Anau.
- 4.15 Potential negative impacts concerning community life were also measured in the survey. The respondents showed strong levels of agreement towards *More crowding in public spaces* (43.3% agree and 32% strongly agree) if visitor number to Te Anau increase in the future. Similar views were indicated regarding traffic, wherein 38.7 percent agree and 37.6% strongly agree that traffic conditions might worsen if Te Anau is developed into a tourism hub. Attention to the design and location of planned infrastructure must be given to avoid these negative impacts from happening.
- 4.16 The final set of survey items assessed residents' perceived impacts on community life in Te Anau. Because tourism showcases assets of a locality, the majority of the residents perceive tourism to *Enhance the community's sense of pride* (37.1% agree and 25.3% strongly agree). However, the mixed opinions about *maintaining original lifestyles* should be noted. Being the lowest rated item (see Table 3. Overall rating of social impact statements ranked from highest to lowest), 24.7 percent and 18.6% percent indicated that they are neutral and disagree on this outcome, respectively. Still, the majority expressed that the overall quality of life in Te Anau will improve (42.2% agree and 19.3% strongly agree) as an impact of tourism development.

## OTHER IMPACTS ANTICIPATED BY THE RESIDENTS

- 4.17 Impacts not included in the social impact assessment framework were also explored. The survey respondents were asked, "Apart from the potential impacts above, are there any other impacts that you think could emerge due to increased visitor numbers to Te Anau?"
- 4.18 Eighty-five (43.8%) of the 194 respondents answered this survey question. The gathered responses were analysed using thematic analysis methods. The analysis resulted in eight themes interpreted as potential impacts of tourism to the Te Anau Basin, namely:
- Stress on infrastructure and services
  - Development of infrastructure and social services
  - Local economic development
  - Inflation

- Impacts on the local visitor economy
- Negative environmental impacts
- Traffic and road safety
- Less desirable changes in community life.

4.19 To analyse the most commonly occurring theme from the responses, coding frequency analysis per theme was performed. Figure 12. Other impacts of tourism stated by residents show the eight themes ordered from the most to the least commonly coded over.

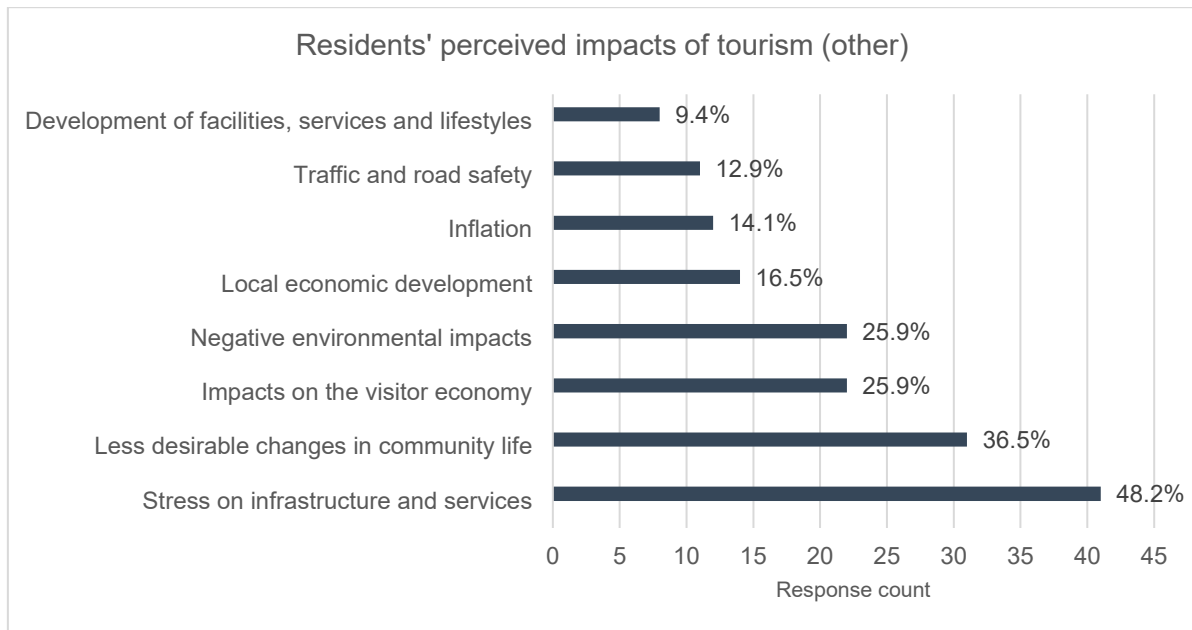


Figure 10. Other impacts of tourism stated by residents. Note that coding frequencies and percentages may exceed 100% of n=85

4.20 Overall, the findings show *Stress on infrastructure and services* (n = 41, 48.2%) as the most dominant theme, followed by *Less desirable changes in community life* (n = 31, 36.5%). Anticipated impacts on the local tourism industry (*Impacts on the visitor economy*, n = 22, 25.9%) and the environment (*Negative environmental impacts*, n = 22, 25.9%) also emerged from the analysis. Positive and negative impacts on the local economy perceived by residents were also found in the themes, namely *Local economic development* (n = 14, 16.5%) and *Inflation* (n = 12, 14.1%). The least occurring themes but also relevant to the research objectives are *Traffic and road safety* (n = 11, 12.9%) and *Development of facilities, services and lifestyles* (n = 8, 9.4%). The following sub-sections provide the descriptions and response codes encompassing each theme.

**STRESS ON INFRASTRUCTURE AND SERVICES**

4.21 Te Anau has a relatively small population. If visitors to Te Anau increase to what they were pre-COVID-19, residents anticipate existing infrastructure and services will be put under pressure. This theme captures residents' concerns about the lack of infrastructure that could support the development of tourism, as current amenities are not designed to accommodate large numbers of permanent and temporary users.

Table 5. Response codes within the theme *Stress on infrastructure and services*

Response codes	n	%
Pressure on existing infrastructure (in general)	13	31.7
Housing shortage	11	26.8
Less carparks	6	14.6

Overuse of toilets	2	4.9
Pressure on wastewater systems	2	4.9
Tension on worker accommodation	2	4.9
Stress on medical facilities	2	4.9
Increase demand on emergency services	1	2.4
Lower quality of recreational activities	1	2.4

Note: Percentages were calculated based on the total response count of the theme (n=41)

4.22 Table 4. Response codes within the theme *Stress on infrastructure and services* identify the specific infrastructure mentioned in the survey responses, which mainly include housing, carparks, toilets, wastewater systems and worker accommodation. Services such as medical and emergency response were also cited because some residents anticipate road accidents that will require medical attention. Below are selected text responses indicative of this theme:

*“Te Anau has a lack of infrastructure to cope with higher numbers of people coming to this town. We don't have enough industry here to cope I don't feel.”*

*“Outgrowing current infrastructure i.e., car parks & supermarkets aren't set up for large numbers.”*

*“Shortage of rental properties as every house is used for short term accommodation. Nowhere for families or workers to live.”*

*“Increase tensions on worker accommodation. Pre-Covid there was a surplus of Airbnb which took housing stock out of the rental market for both local workers who rented and migrant workers who also wanted accommodation.”*

*“Overcrowding from parked vehicles on street, for example view street Manapouri was crammed with vehicles with many parked the wrong way around summer 2019/20”*

*“Out of town tour operators are using the free marina toilets instead of the pay toilets on the lake front that are set up for these visitors.”*

*“More traffic and accidents - more pressure on our volunteers”*

**DEVELOPMENT OF FACILITIES, SERVICES AND LIFESTYLES**

4.23 Although not a dominant theme, residents also view an improvement in the quality of infrastructure and social services in tourism in Te Anau is further developed (see Table 5. Response codes within the theme *Development of facilities, services and lifestyles*). This perceived impact can be associated with the increase in business activities, wherein more recreational facilities and retail shops are anticipated. An improvement in local lifestyles is also mentioned as a result of development.

Table 6. Response codes within the theme *Development of facilities, services and lifestyles*

Response codes	n	%
Development of facilities	2	25.0
Increase quality of local education	2	25.0
Better lifestyle for families	3	37.5
More development (general)	1	12.5

Note: Percentages were calculated based on the total response count of the theme (n=8)

4.24 The following text responses support this theme:

*“More support for new rec facilities like climbing wall, properly designed mountain bike tracks, (not just gravel cycle roads) etc.”*

*“More diversity in shops (e.g., retail and clothing)”*



*“Better schooling”*

*“Improve the lifestyle of the working-class families”.*

**LOCAL ECONOMIC DEVELOPMENT**

4.25 Emphasis on the development of Te Anau’s local economy through tourism was also mentioned in the responses. Although economic impacts were already measured in the survey, this theme encapsulates particular aspects of the economy that residents anticipate to improve. Responses within this theme pertain to an increase in jobs<sup>9</sup>, businesses, economic opportunities, and subsequent improvement in locals’ income levels (see Table 6. Response codes within the theme *Local economic development*).

Table 7. Response codes within the theme *Local economic development*

Response codes	n	%
Increase in jobs	5	35.7
Improvement to the local economy (general)	3	21.4
Increase demand for retail outlets	2	14.3
Increase in opportunities	2	14.3
Increase to business	1	7.1
Increase in income	1	7.1

*Note: Percentages were calculated based on the total response count of the theme (n = 14)*

4.26 Below are some of the statements that are indicative of this theme:

*“More work in general especially in the hospitality industry.”*

*“It would allow more shops to open and service the town so we don't have to buy from the bigger cities.”*

*“Better opportunities for the population as a whole.”*

**INFLATION**

4.27 Negative economic impacts are also dominant in the responses. Residents are worried about the potential increase in rental prices, housing prices and taxes (see Table 7. Response codes within the theme *Inflation*). Although the increase in the cost of living was assessed in the survey, the text responses within the *Inflation* theme indicate that Te Anau might become an expensive place to live if it is developed as a hub.

Table 8. Response codes within the theme *Inflation*

Response codes	n	%
Increase in rental prices	7	58.3
Expensive cost of living	3	25.0
Increase in rates	1	8.3
Inflated housing prices	1	8.3

*Note: Percentages were calculated based on the total response count of the theme (n = 12)*

4.28 According to the text responses, inflation of housing and rental prices may become a by-product of the lack of and increased demand for housing and accommodation in the area. Below are some of the selected resident statements within this theme:

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<sup>9</sup> Measured in the survey

*“Increased number of Airbnb and holiday homes that will reduce the number of residential rental properties available and drive up the cost of renting for the working population in Te Anau.”*

*“Social impacts as cost of living increased the gap between workers and business owners.”*

*“Higher rates for ratepayers.”*

- 4.29 In addition, a potential impact not necessarily pertaining to inflation but is analysed as a negative economic outcome is *economic leakage*. This response code was not allocated to a theme; however, the survey participants’ statement regarding this potential issue is notable and should be considered:

*“Increasing number of offshore owned, managed and targeted toward international visitors with the money going back offshore.”*

### NEGATIVE ENVIRONMENTAL IMPACTS

- 4.30 In the assessment framework, increased support for nature conservation was measured. This theme covers the undesirable impacts on the natural environment strongly narrated in the residents’ qualitative responses. Perceived negative impacts on the environment resulted from increased visitor numbers and certain tourist activities (e.g. campervans and freedom camping) may include the accumulation of rubbish, pollution, pressure on natural resources and damage to the environment (see Table 8. Response codes within the theme *Negative environmental impacts*). Consequently, residents are concerned that the aesthetic appeal of the natural landscape may diminish, too.

Table 9. Response codes within the theme *Negative environmental impacts*

Response codes	n	%
More rubbish and littering	7	31.8
Damage to the environment	5	22.7
Visual pollution	3	13.6
Noise pollution	3	13.6
Increase pressure on water supply	2	9.1
Carbon emissions from vehicles	1	4.5
Increase pressure on protected land	1	4.5

*Note: Percentages were calculated based on the total response count of the theme (n = 22)*

- 4.31 The following statements were identified to support the findings in this theme:

*“Potential to increase the impact on the environment, particularly water quality and supply.”*

*“More visible pollution (rubbish, faeces), more sound pollution of long and short tail bats habitat around the Knobs Flat area.”*

*“Littering, rubbish & fly tipping from campervans. Freedom campers shitting & urinating in public areas.”*

*“Visual and aural pollution.”*

*“Increased carbon emissions from buses and self-driving tourists.”*

### IMPACTS ON THE LOCAL VISITOR ECONOMY

- 4.32 This theme encompasses impacts on tourism in Te Anau as viewed by residents. As shown in Table 9. Response codes within the theme *Impacts on the local visitor economy*, several interrelated issues were identified in the text responses which mainly involves changes in the tourist market, overtourism and camping/freedom camping.

Table 10. Response codes within the theme *Impacts on the local visitor economy*.

Response codes	n	%
Market changes	6	27.3
Overtourism	4	18.2
Decrease in quality visitor experience	4	18.2
Tourism workforce issues	3	13.6
Camping/freedom camping	3	13.6
Increase of congestion at visitor attractions	2	9.1

Note: Percentages were calculated based on the total response count of the theme (n = 22)

4.33 Perceived changes in the tourism market were cited, particularly because of less priority for domestic tourists and an increase in budget travellers. Overtourism was a main issue pre-COVID-19; residents were concerned this might happen again if tourism to Te Anau will grow from what it was pre-pandemic. Regarding the tourism workforce, the local visitor economy might become too dependent on seasonal workers therefore increasing the number of temporary residents. Other potential impacts entail the decrease in visitor experience quality due to crowding at visitor attractions. Below are selected text responses that support this theme:

*“The numbers during the summer season were too high in 2019 - things were actually just starting to get a wee bit out of control.... the on flow of the impact of too many vehicles on the Milford Road and in Milford Sound - making it unappealing for locals to visit our own backyard during the summer season.”*

*“More campervans will crowd Te Anau due to the lack of nearby campsites”.*

*“Less Kiwi's will be able to use the huts as they will be fully booked by international visitors.”*

*“Overcharging by some tourist operators which impacts on New Zealanders who want to visit the area which operators are finding out now.”*

*“Negative experience for visitors, more negative reviews, less FIT more cheap overseas owned tours which bypass small businesses completely.”*

*“Unlikely to find enough NZers to service the area, accordingly likely to require more seasonal workers. Need to consider how Queenstown has changed over the decades from 1980's through to 2019.”*

**TRAFFIC AND ROAD SAFETY**

4.34 According to the responses, an increase in visitor numbers to Te Anau might result in traffic and more road accidents around the area (e.g., Milford Road). Before the pandemic, it was mentioned that at least one accident is recorded per day during peak tourist season (see Figure 4). Residents view this would be the case again when tourism to the area goes back to what it was pre-COVID-19 (see Table 10. Response codes within the theme *Traffic and road safety*).

Table 11. Response codes within the theme *Traffic and road safety*

Response codes	n	%
Road safety	5	45.5
Increase traffic congestion on Milford Road	2	18.2
Increase in road accidents	2	18.2
Increase crashes on Milford Road	2	18.2

Note: Percentages were calculated based on the total response count of the theme (n = 11)

4.35 The following are selected resident statements on this issue:

*“Increase in volume of crashes on Milford Road. My kids stopped taking the school bus as I feared for the safety with the roads being unsafe with the number of incompetent drivers and*

*volume of crashes. Only with the borders being closed do I now feel only feel comfortable to allow them to catch the school bus.”*

*“Road infrastructure congestion on SH94 (Te Anau to Milford Sound and at Milford Sound) and Te Anau-Manapouri Township.”*

*“Safety of the roads.”*

**LESS DESIRABLE CHANGES ON COMMUNITY LIFE**

4.36 According to residents, Te Anau has a relaxed way of life which the researchers have also observed. This theme captures the externalities that may affect community life in Te Anau. Being the second-most dominant theme, attention should be given to avoid these impacts from happening (see Table 11. Response codes within the theme *Less desirable changes in community life*).

Table 12. Response codes within the theme *Less desirable changes in community life*

Response codes	n	%
Lose “sense of community”	7	22.6
Increase in crime	4	12.9
Change relaxed lifestyle	3	9.7
Change of culture in Te Anau	3	9.7
Loss of quietness	3	9.7
Over commercialisation	3	9.7
Increase in overcrowding	3	9.7
Decrease in town safety	3	9.7

*Note: Percentages were calculated based on the total response count of the theme (n = 31)*

4.37 Amongst the narratives, losing a “sense of community” was the most commonly coded response. If tourist numbers will not be managed properly, some residents were concerned there will be less community cohesion in Te Anau. Changes in culture and relaxed lifestyle might also happen, mainly due to commercialisation and overcrowding, as observed in the likes of Queenstown. Worries about an increase in crime affecting local’s sense of security were also communicated. The following responses capture these issues coded into less desirable changes in the community life:

*“Greater numbers increase demand for services but will also ruin the quiet nature of the town and area. You can build more toilets but you can’t make the lake and park nor the sounds bigger. You can only ‘fit’ a certain amount of people in these places before what makes them special is ruined.”*

*“The lost of our community....one only has to look at the impact of excessive tourism worldwide to realise the implications of ‘selling your soul’. Properly managed, I have no problems. With ‘free market’ exploitation, we’ll lose our uniqueness. One only has to look at the rampant greed and commercialism of neighbouring Queenstown to realise that, ultimately, you prostitute your environment, society and ‘raison d’etre’.”*

*“Town would not be as safe for our children and property. Things are pretty relaxed ATM [at the moment] but more people in general around that area I would expect to see an increase in crime, drugs and other unwanted social consequences.”*

*“Being like Queenstown when we are not and don’t want to be.”*

**PERCEIVED LONG-TERM IMPACTS OF TOURISM**

4.38 One of the objectives of this study is to identify the critical social values that that planning for increasing visitor numbers will need to address long-term – e.g., timescales of 10-15 and 25 years. To address this objective, an open-ended question that inquires of residents perceived long-term impacts of tourism to Te Anau was included in the survey. This question asked, “In your

*opinion - if more tourism infrastructure was developed and visitor numbers to Te Anau increased, what would be the main social impacts over the next 10 to 25 years?"*

- 4.39 In total, 146 respondents or 75.3 percent of the sample (N = 194) answered this question. The text responses were subjected to sentiment analysis to understand the general opinion of the respondents. Of the qualitative responses, 97 statements contained either positive or negative sentiments which were assigned into a four-point scale namely, "1 = very negative" to "4 = very positive". The remainder had either no sentiments identified in them or were analysed as neutral responses.
- 4.40 Figure 13. Sentiment analysis of residents' long-term impacts of tourism statements (n = 97) shows the findings of the sentiment analysis. It can be deduced that an almost equal distribution of positive and negative sentiments surrounding the long-term impacts of tourism to Te Anau is present in the text responses.

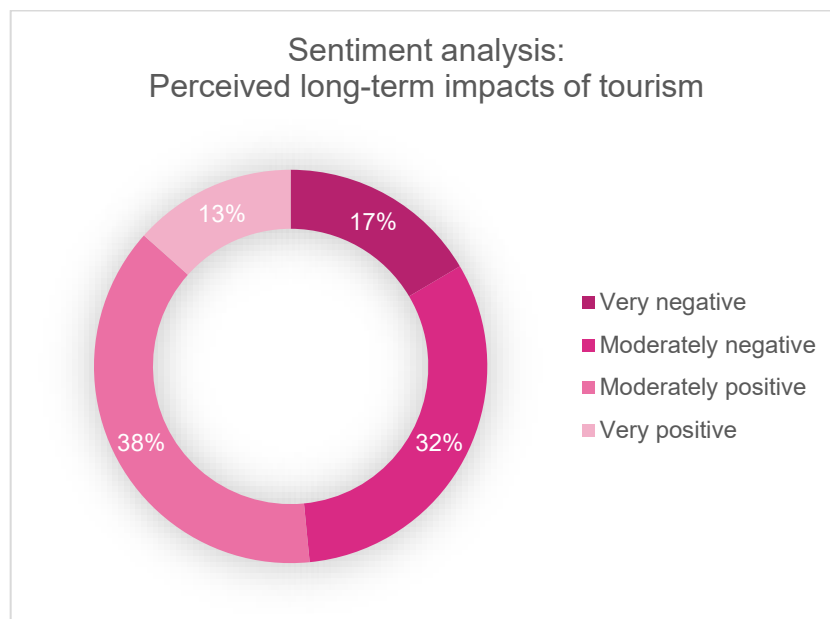


Figure 11. Sentiment analysis of residents' long-term impacts of tourism statements (n = 97)

- 4.41 To gain deeper insights into the perceived long-term impacts of tourism, thematic analysis was conducted on the text responses. The analyses resulted in seven themes that encompass long-term impacts on the community. The coding frequencies or response counts of each theme, and their percentage distribution over the total number of qualified responses (n = 174), were calculated. The results of these analyses were illustrated in Figure 14, to rank the themes by the lowest to the highest number of responses coded.

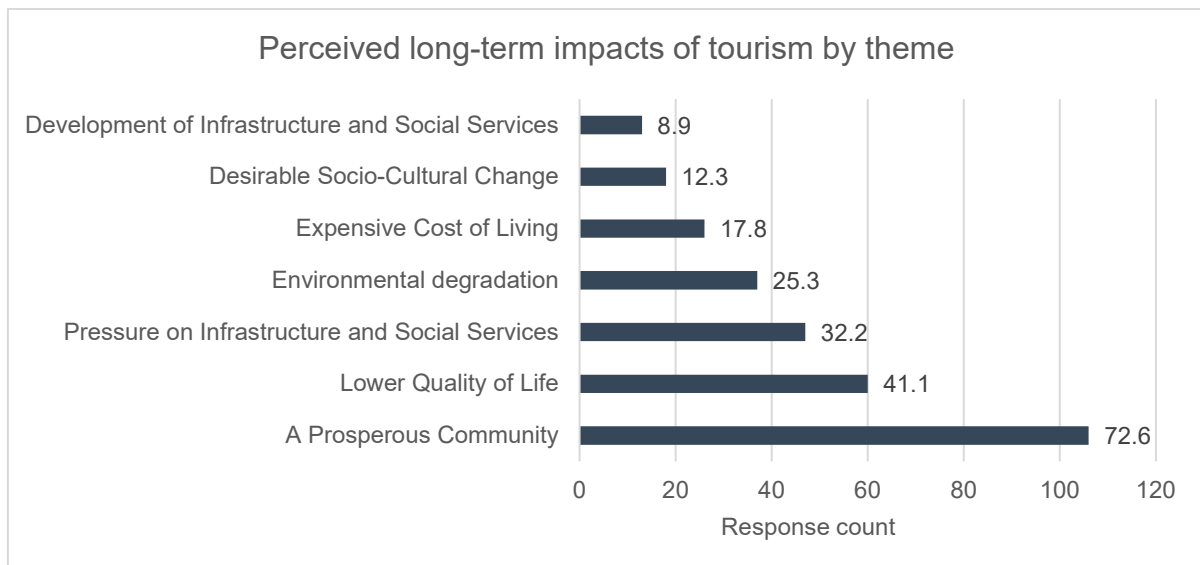


Figure 12. Long-term impacts of tourism stated by residents. Note that coding frequencies and percentages may exceed 100% of n=174

4.42 Positive economic impacts captured in the theme *A Prosperous Community* (n = 106, 72.6%) was the most dominant perceived long-term impact of tourism to Te Anau. However, this was followed by negative outcomes namely *Lower Quality of Life* (n = 60, 41.1%) and *Pressure on Infrastructure and Social Services* (n = 47, 32.2%). More than a quarter of the responses encapsulate negative impacts on the environment – *Environmental degradation* (n = 40, 27.4%) – as a long-term impact of tourism. Less than a quarter of the responses entailed positive social impacts, namely *Desirable Socio-Cultural Change* (n = 18, 12.3%) and *Development of Infrastructure and Social Services* (n = 13, 8.9%). The following sections explain these long-term impacts in detail, structured according to dimension: economic, social and environmental.

### LONG-TERM ECONOMIC IMPACTS

4.43 The findings show the number of positive economic impact statements outweighs their negative counterparts. It can be suggested that residents are optimistic about the creation of economic benefits for their community in the long run. Conversely, some negative outcomes identified by residents should be avoided. The following themes include the anticipated long-term economic impacts of tourism to Te Anau.

#### A PROSPEROUS COMMUNITY

4.44 This theme captures desirable tourism development outcomes that lead to a higher standard of living and enhanced economic wellbeing of the community (see Table 12. Response codes within the theme *A Prosperous Community*). If developed as a hub, residents stated that more business establishments and investment opportunities offering more jobs, increase in income and stable work, will be created in Te Anau in the next 10 to 25 years. The expansion of tourism might contribute to the growth of the town, not just by population but in other aspects as well (e.g., infrastructure and services). In turn, young families might find more opportunities for them in the area.

Table 13. Response codes within the theme *A Prosperous Community*

Response codes	n	%
More job opportunities	17	16.0
More business establishments	17	16.0
Increase in population	15	14.2
Increase in business opportunities	13	12.3
Growth of town	11	10.4
Economic growth	9	8.5

Attractive for investors	5	4.7
More opportunities (general)	5	4.7
Stable economy	3	2.8
Increase in income	3	2.8
Increase in future opportunities for young families	3	2.8
Stable jobs	3	2.8
Higher standard of living	2	1.9

Note: Percentages were calculated based on the total response count of the theme (n=106)

4.45 Below are some of the selected text responses indicative of this theme:

*“The more people are here, the more businesses will develop. Increase in population who will support the development of businesses.”*

*“Positive impacts would be bringing money to our town and making it thrive!!”*

*“More people in the area, so busier walks and busier roads. But also a more prosperous region, with better facilities and amenities.”*

*“More job opportunities Better chance for growth of businesses and community.”*

*“Population may increase which would help with retail and service businesses.”*

*“Growth in all areas for the community.”*

*“I think it could also attract investors into building new businesses here that could bring more permanent residents to our town”*

*“Generally, the well-being of the community will be more healthy and the young families that have left can return and build a future.”*

*“I think you would see Te Anau grow a lot as a town we would end up with a better support network for our residents because people would be confident to invest in our town which currently isn’t happening.”*

*“Easier for young families: more chance to get a job.”*

**EXPENSIVE COST OF LIVING**

4.46 If not controlled properly, residents foresee Te Anau becoming an expensive place to live in the future. Like in the previously explored impacts (see *Inflation*), residents are concerned about the potential increase in rental prices, housing prices and rates, as a long-term consequence of tourism development (see Table 13. Response codes within the theme *Expensive Cost of Living*). Views about an increase in prices of essential commodities were also present in the text responses.

Table 14. Response codes within the theme *Expensive Cost of Living*

Response codes	n	%
Property values	9	34.6
Rental prices	7	26.9
Cost of living (general)	7	26.9
Taxes and Rates	3	11.5

Note: Percentages were calculated based on the total response count of the theme (n=26)

4.47 As apparent in the reasoning found in the statements, residents do not want Te Anau to become another Queenstown where the general cost of living has inflated as the latter developed as a popular tourist destination. The following text responses signal these long-term impacts captured in the theme:

*“If not handled right, the cost of living for locals will increase.”*

*“Probably there would be a shortage of suitable accommodation, rental property for supporting workers and their families.”*

*“Good. But it needs to be planned around benefitting the LOCALS! Do not make the town all about Tourists. It needs to be a LIVABLE town. Policies put in place where housing will not be taken away from residents to serve tourists, where employers will need to ethically hire staff, where public places will be protected from irresponsible users, etc.”*

*“Locals will have fewer options for accommodation and may be forced to move away.”*

*“Potential to become too expensive for families to live and work here.”*

*“Cost of living will rise a lot. Like Queenstown.”*

*“Cost of living would increase. More business started. Population would rise. Will not be a favour for the local population like now. There is a strong fear that we would become like Queenstown.”*

*“House prices will go up then the people already here will be forced to move, that goes for rent prices too...In conclusion it will become a mini version of Queenstown.”*

4.48 Other negative long-term economic impacts that were not allocated into themes but are worthy of attention include potential economic leakages and inequalities. Below are statements that capture these undesirable outcomes:

*“Mass tourist numbers spending in their own offshore linked businesses.”*

*“The margin between the rich and poor will grow.”*

### LONG-TERM SOCIAL IMPACTS

4.49 Four themes were revealed as perceived long-term impacts on the community’s social dimension, namely:

- Desirable Socio-Cultural Change
- Development of Infrastructure and Social Services
- Pressure on Infrastructure and Social Services
- Lower Quality of Life

4.50 Although desirable changes were uncovered, the anticipated undesirable consequences appear to be more dominant in residents’ text responses. Below are the descriptions and analysis of these long-term social impacts.

### DESIRABLE SOCIO-CULTURAL CHANGE

4.51 Tourism was foreseen to bring positive socio-cultural changes in Te Anau in the form of cultural diversification, as a result of more people visiting, living and working in the community (see Table 14. Response codes within the theme *Desirable Socio-Cultural Change*). As a result of economic prosperity through tourism development, better social wellbeing outcomes and reputation could be created for the residents and community at large.

Table 15. Response codes within the theme *Desirable Socio-Cultural Change*

Response codes	n	%
Cultural diversification	8	44.4
Better quality of life	5	27.8



Increase of young permanent residents	2	11.1
Increase in support systems for residents	2	11.1
Better reputation	1	5.6

Note: Percentages were calculated based on the total response count of the theme (n=18)

4.52 Below are selected statements that are indicative of this theme:

*“If planned properly, enhance the towns reputation as an idyllic spot.”*

*“Wider more diverse community.”*

*“Become more culturally diverse.”*

*“...The town’s culture would diversify.”*

**DEVELOPMENT OF INFRASTRUCTURE AND SOCIAL SERVICES**

4.53 Although not frequently emerging from the responses, statements that pertain to the development of infrastructure and social services in Te Anau were also identified (see Table 15. Response codes within the theme *Development of Infrastructure and Social Services*). Most statements encapsulated in this theme were general; however, specific infrastructures such as roads, walking trails and waste management systems were prospected to improve. Generally better planning and design for the town centre was also apparent in the responses.

Table 16. Response codes within the theme *Development of Infrastructure and Social Services*

Response codes	n	%
Infrastructure and facilities upgrade (general)	6	46.2
Better town planning and design	4	30.8
Better waste management systems	2	15.4
Safety of the corridor	1	7.7

Note: Percentages were calculated based on the total response count of the theme (n=13)

4.54 Note that **Chapter 5 Residents’ Support and Infrastructure Needs for Tourism** discusses residents’ ideas for infrastructure needed to support growth in tourism. The following are selected text responses coded within this theme:

*“...a more prosperous region, with better facilities and amenities.”*

*“A vibrant town with increased opportunities and facilities for all.”*

*“...hopefully improved town planning and modernised town.”*

*“It would also mean more money to upgrade and expand current facilities.”*

*“More attention to the safety of the corridor.”*

**PRESSURE ON INFRASTRUCTURE AND SOCIAL SERVICES**

4.55 Like what was explained in the previous section on **Other impacts anticipated by the residents**, stress on current infrastructure and social services was again communicated as a long-term impact of tourism. It can be implied that these responses are associated with the number and size of the facilities the town has at present. Furthermore, pressure on infrastructure and social services are expected to occur if tourism and the population of Te Anau will overdevelop in the future.

Table 17. Response codes within the theme *Pressure on Infrastructure and Social Services*

Response codes	n	%
Housing shortage	13	27.7
Stress on existing infrastructure and services (general)	11	23.4

More traffic	7	14.9
Limited carparks	6	12.8
Pressure on emergency and medical services	4	8.5
More demand for educational services	4	8.5
Overuse of toilets	1	2.1
Overdevelopment	1	2.1

Note: Percentages were calculated based on the total response count of the theme (n=47)

4.56 As shown in Table 16. Response codes within the theme *Pressure on Infrastructure and Social Services*, the potential issues captured in this theme include housing and accommodation shortage, limited facilities such as carparks and toilets, and pressure on social services (e.g. healthcare and education). The following are indicative statements within this theme:

*“Probably there would be a shortage of suitable accommodation, rental property for supporting workers and their families.”*

*“Not enough housing for locals, too much focus on tourism - need to diversify”*

*““However the seasonal nature would still limit things but put pressure during the peak summer months on infrastructure, housing etc.”*

*“infrastructure has to include worker accommodation. Without suitable accommodation for our workers Te Anau cannot afford to grow bigger to cater for an increase of visitors”*

*“Lack of healthcare providers and facilities (residents are currently driving to Queenstown or Invercargill just to see a dentist).”*

*“Road traffic in Milford road and from Queenstown was and would be a concern. Pre covid my family and I would very rarely drive to Queenstown during the summer season due to crazy driving.”*

*“More public toilets needed and better infrastructure for campervans.”*

**LOWER QUALITY OF LIFE**

4.57 In contrast to the positive sentiments in the theme *A Prosperous Community*, this theme labelled *Lower Quality of Life* encompasses the social consequences of tourism that might occur in the next 10 to 25 years. Accounting for 41.1 percent of text responses, this is one of the most prominent perceive long-term impact. Tourism planners should pay special attention to residents’ views and concerns surrounding this theme, because less optimistic social impacts are projected in locals’ statements.

Table 18. Response codes within the theme *Lower Quality of Life*

Response codes	n	%
Overcrowding	11	18.3
Loss of community	10	16.7
Comparing to Queenstown	10	16.7
Less safe and secure community	7	11.7
Decrease quality of life (general)	6	10.0
Lose relaxed rural lifestyle	4	6.7
Road safety	4	6.7
Comparing to Wanaka	3	5.0
Loss of quietness	3	5.0
Diminished community pride	2	3.3

Note: Percentages were calculated based on the total response count of the theme (n=60)

4.58 If tourism development – and associated impacts –are not managed properly through design, residents perceive that the quality of life in Te Anau may diminish. Echoing the findings in the theme *Less desirable changes on community life*, this impact could be the result of a combination of outcomes including overcrowding and congestion, loss of quietness and relaxed lifestyles, low sense of safety and security, and decreased sense of pride in the community. Similar to the arguments around negative economic impacts (e.g., *Expensive Cost of Living*), residents tend to refer to Queenstown and Wanaka as examples that Te Anau must not follow.

4.59 The following statements support these observations and analyses:

*“...loss of small community feel”.*

*“Cohesiveness of community would disintegrate.”*

*“Property speculation by investors Suburban sprawl decreasing local quality of life.”*

*“Infrastructure and development would impact the rural and natural environment.”*

*“Te Anau is currently bearing the cost of solely focusing on the Chinese market pre-Covid. Mass tourism is fine for those that live in cities of 10 million plus people, but Te Anau would be giving up too much in terms of quality of life and lifestyle if it were to veer down that path in the future. Wanaka, pre-Covid, had a mixed tourism target, both local and international, and is bustling and doing well in comparison.”*

*“Could be going in the same direction as Queenstown, unplanned expansion leading to massive traffic problems and getting the feel of an ugly city. If we can learn from Queenstown we can avoid that fate and have a sustainable model for other towns in New Zealand to follow.”*

*“Te Anau would have to grow but I would hate to see it like Queenstown.”*

*“Te Anau wouldn't be the town it is now. Don't want to get out of hand like Queenstown or Wanaka.”*

*“Less community pride.”*

## LONG-TERM ENVIRONMENTAL IMPACTS

4.60 As shown in the theme below, long-term environmental impacts forecast by residents are mainly negative. Damage to the environment and natural resources were raised as a potential long-term impact of tourism.

### ENVIRONMENTAL DEGRADATION

4.61 Accounting for 25.3 percent of text responses, this theme emerged as the dominant and only theme categorised in the community’s environmental dimension (see Table 18. Response codes within the theme *Environmental Degradation*). Associated with the increase in visitor numbers, responses reveal concerns towards rubbish and waster generation in and around Te Anau; this was associated with the lack of waste management systems in place (e.g., recycling bins). Pressure on natural resources and pollution (e.g., gas emissions) were raised as concerns in the future. Increases in foot traffic and crowding were argued to potentially ruin the aesthetic of natural areas (e.g., Fiordland National Park), affecting the competitive advantage of the destination.

Table 19. Response codes within the theme *Environmental Degradation*

Response codes	n	%
Environmental degradation (general)	11	29.7
Rubbish and waste generation	7	18.9
Pollution	5	13.5
Increase sewage	4	10.8

More foot traffic in natural areas	4	10.8
Degradation of aesthetic experience	3	8.1
Pressure on water resource	3	8.1

Note: Percentages were calculated based on the total response count of the theme (n=37)

4.62 Below are selected text responses supporting this theme:

*“Conservation would be impacted hugely if numbers increased. Not saying that numbers shouldn’t increase, but they should be spread across many experiences/departures. Tourism should go hand in hand with DOC and Mana whenua to develop programmes that ensure not only preservation of current environments but actively improve pest control and infrastructure to cope with numbers.”*

*“Rubbish would also increase (more or larger bins would be needed, could promote a recycling bins like they have in many other towns and cities.”*

*“Environmental impacts with more foot traffic. Local area is special and footprint will have an impact.”*

*“This would completely depend on the tourism infrastructure developed. If tourists continued to arrive by petrol powered cars/buses, then all kinds of pollution would increase.”*

*“Increased tourism infrastructure risks continued degradation of the natural landscapes and environment that attracts people here.”*

*“Would need much better recycling and waste management systems.”*

#### **POSITIVE OUTCOMES FOR THE ENVIRONMENT**

4.63 This sub-section is not analysed as a theme because very few responses were identified to refer to positive impacts on the environment. These statements read *“greater appreciation of the natural beauty surrounding the town”* (appreciation for nature) and *“Attract more conservation sponsorship to improve our nature if tourism/users are thriving”* (increase support for conservation). The fact that minimal positive environmental impacts were found in the responses indicates that future tourism plans in Te Anau must be designed to have limited to no negative impacts and must conserve nature.

## 5 SUPPORT FOR TOURISM DEVELOPMENT AND INFRASTRUCTURE NEEDS

- 5.1 Securing a social licence for tourism to operate in a locality is important. It is important for this study to understand Te Anau residents' support for tourism. Likewise, the form of tourism development that is most acceptable to the local community should be explored, making sure future developments align with their aspirations. Finally, the perspectives of the community about social and infrastructure need to support such development should be uncovered. This chapter presents the survey findings pertaining to the aforementioned objectives.

### RESIDENTS' OPINIONS ON TOURISM

- 5.2 This section presents residents' opinions on tourism by exploring their general feelings or support for the industry, and views on visitor numbers to their community pre-COVID-19.
- 5.3 To understand local support for tourism, respondents were asked to rate their general feelings towards tourism in Te Anau using a five-point scale, namely "1 = Strongly oppose" to "5 = Strongly favour". Figure 15. Frequency analysis of responses towards residents' support for tourism (N=191) reveals general opinions about tourism in the community.

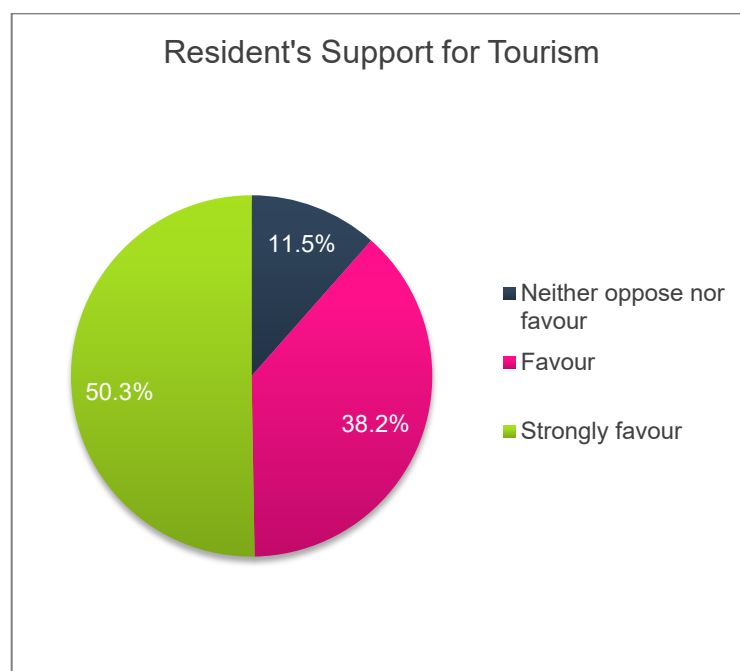


Figure 13. Frequency analysis of responses towards residents' support for tourism (N=191)

- 5.4 The result shows strong support for tourism in the local community ( $M = 4.39$ ,  $SD = .686$ ). The majority either strongly favour ( $n = 96$ , 50.3%) or favour ( $n = 73$ , 38.2%) tourism development. There were neutral responses ( $n = 22$ , 11.3%); however, no one indicated their opposition to tourism. This suggests future tourism development projects in the locality are highly likely to gain the support of residents in general.
- 5.5 In addition, residents were asked about their opinions on visitor numbers to Te Anau pre-COVID-19 and instructed to indicate their views on a scale of "1 = They should have been significantly reduced" to "5 = They should have been significantly increased". The frequency analysis showed residents to have mixed opinions on this question, with the majority having neutral views ( $M = 3.20$ ,  $SD = 0.969$ ). As shown in Figure 16. Frequency analysis of residents' opinions on visitor numbers to Te Anau pre-COVID-19 (N=191), 41.9 percent ( $n = 80$ ) indicated they prefer "no change" in visitor volumes while 25.7 percent ( $n = 49$ ) selected "They should have been somewhat reduced". This finding questions whether increasing visitor numbers from what they were pre-pandemic should be the direction that tourism in Te Anau heads to.

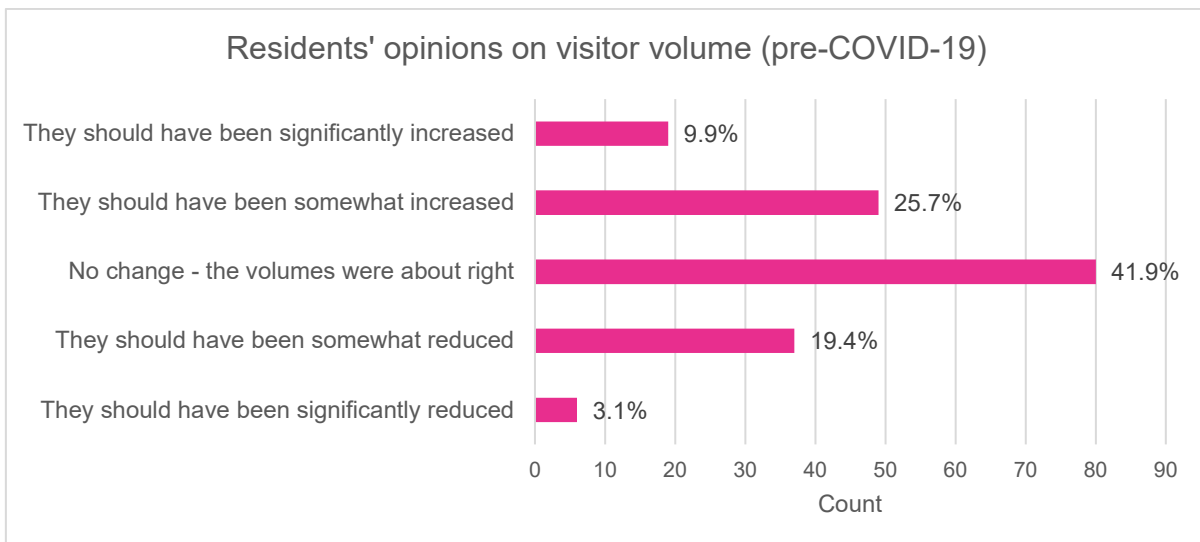


Figure 14. Frequency analysis of residents' opinions on visitor numbers to Te Anau pre-COVID-19 (N=191)

## ACCEPTABLE FORMS OF TOURISM DEVELOPMENT

5.6 Although it was found that most residents support the development of tourism in Te Anau, it should be noted that their support still depended on the style of tourism being designed in the community. Thus, this study inquires what is the form of tourism development that is acceptable to the local community. To address this study objective, an open-ended question that reads, “in your opinion - what kind of tourism should be occurring in and around Te Anau?” was asked. A total of 159 text responses were gathered from the survey. This section presents the findings of the thematic analysis, which revealed visitor markets/types and forms of tourism to Te Anau.

### VISITOR TYPES

5.7 Residents' views on visitor volumes were measured in the survey; however, more important to explore are the visitor types that locals suggest targeting. Of the text responses to the question about preferred tourism development style, *visitor types* were mentioned in 89 statements (55.97%) (see Table 19. Visitor types mentioned in the text responses).

Table 20. Visitor types mentioned in the text responses.

Visitor types	Descriptions	n	%
All types	<i>All types of visitors – everybody is welcome!</i>	30	33.71
High-spenders	<i>High-paying, long-staying, prefer luxury products</i>	12	13.48
Domestic tourists	<i>Visitors originating from other New Zealand regions</i>	11	12.36
Trampers & cyclists	<i>Visitors motivated to do great walks or cycle around the area</i>	10	11.24
Environmentally-aware tourists	<i>Pro-environmental tourists, aware of and minimises their environmental impacts</i>	5	5.62
Independent travellers	<i>Free and independent travellers, not “cattle class”</i>	5	5.62
International tourists	<i>Visitors originating from other countries</i>	5	5.62
Inter-generational tourists	<i>Tourists of all ages; families</i>	4	4.49
Group tourists	<i>Travelling in groups, usually organised tours</i>	2	2.25
Backpackers	<i>Usually independent, travelling on a shoestring</i>	2	2.25
Milford & Doubtful Sound tourists	<i>Visitors whose main motives are to visit Milford and Doubtful Sound</i>	2	2.25
Campervan tourists	<i>Visitors travelling in campervans, including freedom campers</i>	1	1.12

Note: Percentages were calculated based on the total response count of the theme (n=89)

5.8 The findings show that *all types of tourists* (n = 30, 37.97%) should be targeted and welcomed to Te Anau, indicating residents' support for tourism and hospitality towards visitors. However,

specific types were also mentioned such as *high spenders* (n = 12, 15.19%) and *domestic tourists* (n = 11, 13.92%). The latter finding is in accordance with the positive attitude noted from residents welcoming and encouraging domestic tourism – although not as high-spending. As some residents stated,

*“It has been amazing seeing Kiwi’s travelling across the country. Witnessing Kiwis use the cycle trails and experiencing Milford Sound has been a simple but powerful by-product of Covid-19.”*

*“We should support the domestic market not just the rich people from overseas.”*

- 5.9 Niche markets such as *trampers and cyclists* (n = 10, 11.24%) were also identified. Conversely, there were less mentions of *group tourists, backpackers, Milford and Doubtful Sound tourists* and *campervan tourists*. It can be recalled earlier that some locals have negative sentiments towards campers and campervans (see **Impacts on the local visitor economy** in Chapter 4).
- 5.10 Furthermore, residents emphasised the need to disperse visitors across seasons. Tourism is prone to seasonality. Spreading tourist numbers throughout the year by offering visitor experiences that could attract tourists during the lean season (e.g. winter) was a key response regarding managing tourism demand.

## FORMS OF TOURISM DEVELOPMENT

- 5.11 The surveyed residents see the future of Te Anau as a destination, not just a stopover for tourists staying in Queenstown. Various forms of tourism development that are acceptable for locals were revealed in the responses. Five themes or ideas that could be considered for Te Anau, were delineated through thematic analysis. Below is the summary and ranking of these ideas from the most to the least frequently cited (see Table 20. Forms of tourism suggested by residents).

Table 21. Forms of tourism suggested by residents.

Forms of Tourism	Descriptions	n	%
Slow Experiential Tourism	<i>Long stays (3-4 nights), immersive in nature and community, diverse activities but offer rural community experience</i>	70	44.03
Nature-Based Tourism	<i>Tourism that takes place in the natural environment with particular attention to conserving and learning about nature</i>	58	36.48
Adventure and Outdoor Recreation	<i>Active leisure and recreation activities undertaken in natural sites, including more activities on and use of Lake Te Anau</i>	50	31.45
Cultural Tourism	<i>Tourism that showcases and educates visitors of the history of the mana whenua</i>	13	8.18
Family-Oriented Tourism	<i>Introduction of family-friendly leisure activities for both visitors and locals to enjoy</i>	13	8.18

*Note: Percentages were calculated based on the total response count of the theme (n=79)*

### SLOW EXPERIENTIAL TOURISM

- 5.12 Slow immersive tourism was found as a key idea from the responses (n = 70, 44.03%): a style of tourism development is consistent with the vision of making Te Anau a hub (see Table 21. Response codes within the theme *Slow Experiential Tourism*). Statements support Te Anau as strategically located to “slow down” visitors going to the Milford Sound Piopiotahi. Long stays (e.g. at least 3-4 nights per trip) for visitors to experience the rurality and relaxed community life in Te Anau were encouraged.
- 5.13 However, this means there should be a diversification and re-packaging of current tourism offerings in Te Anau. Apart from capitalising on existing tourism products (e.g. cycling, lake-based

activities, tramping), new “slow” tourism products such as ‘health and wellness’ focused can be integrated. In addition, as opposed to mass packaged tours, free and independent travellers who are into outdoor recreation – both passive and active – are potential markets for this type of tourism. Visitors spending longer duration and doing more activities in a destination also means better economic value drawn from tourism.

Table 22. Response codes within the theme *Slow Experiential Tourism*

Response codes	n	%
Encourage longer stays	29	41.43
Experience-oriented tourism	13	18.57
Not like Queenstown	10	14.29
Keep peaceful small-town	6	8.57
Slow tourism (general)	4	5.71
Health & wellness	3	4.29
Passive outdoor recreation	3	4.29
Immersive travel	2	2.86

Note: Percentages were calculated based on the total response count of the theme (n=70)

5.14 The following are selected responses within this theme:

*“Encourage long stays in Te Anau. At least 4 to 5 days”*

*“Encourage tourists to make Te Anau a destination not just a stop off on the way to Milford.”*

*“Highlight peace and quiet because that’s what tourists like about Te Anau”.*

*“It truly is the final frontier and shouldn’t try and be like all the other tourist towns. It should be promoted as a place to get away from the chaos of modern living and get back to something primordial and untouched. Small scale developments over time will be the key.”*

*“Develop more long-lasting activities to encourage tourists to stay not just stop-over.”*

*“I’d like to see tourists who respect the majesty of Fiordland and spend a little more time, not rushing through”.*

*“Te Anau need visitors who would like to stay here for several days. Two nights are easy to justify - one day trip to Milford Sound, I would aim to three nights stays+ We have many stories to tell, unique nearly untouched rainforest and fiords (in the future it will be more and more precious and highly valued attraction)”*

*“Immersive in nature and community”*

*“More tours around the town for the bus loads instead of just a quick stop and straight to Milford.”*

*“Dark skies the entire town (no nightlights)”*

*“Stick around and enjoy everything rather than racing through.”*

**NATURE-BASED TOURISM**

5.15 Tourism activities undertaken in the natural environment to learn and appreciate nature was another key theme (n = 58, 36.48%). Since natural sites such as the Fiordland National Park, Milford Sound Piopiotahi, Doubtful Sound and Lake Te Anau and surrounds are key attractors for tourists to visit the area, nature-based tourism that has high conservation value was favoured by respondents (see Table 22. Response codes within the idea *Nature-Based Tourism*).



Table 23. Response codes within the idea *Nature-Based Tourism*

Response codes	n	%
Ecotourism (general)	24	41.38
Fiordland environment (niche)	8	13.79
Nature-based holidays	8	13.79
Lake-based activities	7	12.07
Conservation focused (general)	6	10.34
Scenic travel	4	6.90
Carbon-neutral	1	1.72

*Note: Percentages were calculated based on the total response count of the theme (n=58)*

5.16 In addition to these sites are the wildlife attractions that Te Anau currently showcases to tourists (e.g., bird park and glow worm caves). Residents recognise that these are existing tourism experience offerings that Te Anau should further amplify. A clearer message that promotes Te Anau as the 'gateway to Fiordland' was also suggested. High-value ecotourism was a notable response, wherein benefits should be created for both nature (planet) and the community (people).

5.17 Below are selected statements that pertain to nature-based tourism:

*"Ecotourism to immerse people in nature before all the developments. It will give visitors a sense of how things were before developments. We should capitalise more on our natural assets because this is our competitive advantage. People want to interact with natural beauty of the environment."*

*"Focus should be on promoting the natural beauty and leave no trace ethics. I'd like to see tourists who respect the majesty of Fiordland and spend a little more time, not rushing through."*

*"Eco-friendly sustainable tourism. Something that will not damage the place. No point of pillaging the landscapes."*

*"Eco - it's been mass tourism for too long and now we are fucked"*

*"The landscape of Fiordland is incredible and so unique to the rest of NZ. The community here has a real pride in the land and I think tourist activities should reflect that and bring visitors closer to nature. It's a place where people come to get away from the noise and usual antics of cities and larger towns."*

*"Nature based. Decrease commercialisation of nature (it sells itself- leave it as pure as possible)."*

*"We should make ourselves the first totally carbon neutral tourism destination in NZ - everyone who visits should pay for this with a levy on all accommodation/activity tickets."*

*"High value, ecotourism. That is; real ecological tourism that actually improves the environment and standard of living for the locals."*

## **ADVENTURE AND OUTDOOR RECREATION**

5.18 Associated with the majestic landscape and nature in Te Anau, adventure and outdoor recreation activities undertaken in natural areas emerged as a key idea (n = 50, 31.45%). Already existing in Te Anau, residents highlighted outdoor activities such as cycling, tramping and kayaking that engage visitors actively, as an acceptable style of tourism that should be occurring in and around Te Anau. It can be identified earlier that these are some activities that would make visitors stay longer in the area and further immerse latter in nature. Conversely, suggestions for more visitor activities on Lake Te Anau were raised. According to the residents, the lake is currently under-

utilised for both local and visitor recreation (see Table 23. Response codes within the idea *Adventure and Outdoor Recreation*).

Table 24. Response codes within the idea *Adventure and Outdoor Recreation*

Response codes	n	%
Tramping and cycling	13	26.00
Outdoor activities	9	18.00
Activity-based tourism (general)	9	18.00
Adventure tourism (general)	8	16.00
Lake-based activities	7	14.00
Active recreation	3	6.00
Advertising of walks and trails	1	2.00

Note: Percentages were calculated based on the total response count of the theme (n=50)

5.19 The above findings suggest that strategies wherein the first three ideas – *slow experiential tourism, nature-based tourism* and *adventure and outdoor* – can be integrated seamlessly in the Te Anau experience must be developed. Below are some of the statements that pertain to this key idea:

*“Activities with a strong connection to the land should be further promoted and developed (walking, fishing, climbing, bike riding, diving, kayaking etc).”*

*“Focus on outdoor activities like hiking/ boats and cycling.”*

*“Tramping and kayaking tourists. Fishing too.”*

*“Develop advertising around tracks and walks (there are more than what is currently being advertised)”*

*“Te Anau is also the hiking capital of the world but I think more could be done to bring nature-loving people to the town and promote the walks more.”*

*“DOC needs to allow businesses like kayaking and the likes on the lake. Expand for the adventure tourists i.e., bike tracks, promote fishing here more, paid hunting trips.*

*“...utilising the lake more - as an example; getting a community rowing club or waka ama team going.”*

*“Encourage those who want to bike, walk and take in the scenery.”*

### CULTURAL TOURISM

5.20 While the first three ideas have been existing in Te Anau already, this theme captures a form of tourism that could be further developed. *Cultural tourism* was found as an emergent idea centred on showcasing the culture and story of Ngai Tahu in the visitor experience (n = 13, 8.18%). At present, the culture and heritage of mana whenua is not strongly weaved in Te Anau tourism. Suggestions to incorporate these important aspects were stated so that visitors may have authentic and educational experiences in the area.

Response codes	n	%
Emphasise Māori history	7	53.85
A 'Kiwi experience'	3	23.08
Authentic & educational	3	23.08

Note: Percentages were calculated based on the total response count of the theme (n=50)

5.21 The following statements illustrate this key idea:

*"I'd like to see the locals taught how to pronounce the name of the place. I'd like to see treaty settlement Ngai Tahu stories taught to adults and ecological sessions at deep cove hostel or lakefront motorcamp or museum".*

*"more emphasis on tangata whenua who were here before the tourists".*

*"There could be more about local history, including Māori."*

*"maybe interactive history of the area - museum - info boards"*

### **FAMILY-ORIENTED TOURISM**

- 5.22 Another emergent idea is *family-oriented tourism* (n = 13, 8.18%). Tourist activities designed for families visiting and living in Te Anau were suggested by residents. Te Anau is viewed as one of the perfect places to raise a family; currently, many young families are residing in the locality. The introduction of family-oriented leisure activities – which are affordable for families – will not only diversify the visitor experience but also provide recreational opportunities for locals.
- 5.23 There were not response codes allocated under this theme. However, based on the responses, informal conversations, researcher observations and the visitor experience gaps in Te Anau, *family-oriented tourism* was analysed as a theme in itself. Below are some of the responses indicating this idea:

*"Family-based tourism. Therefore, more playgrounds and kid-friendly signage or interactive displays on the Milford Road would be a huge bonus in winning over this type of tourist. Although families don't spend the most. The memories left with them could create intergenerational visitors."*

*"Family tourism, especially in the winter; hot pools/tubs"*

*"More family friendly opportunities. The infrastructure should cater to family friendly opportunities."*

*"We are an outdoor pursuits town and want to make it family friendly with cycle tracks and exploration that is not held back by DOC not wanting anyone to see it or touch it."*

*"Family orientated activities that will strengthen families to meet NZ Kiwi /domestic market."*

*"Prices should be more family friendly."*

### **'NOT-SO' ACCEPTABLE FORMS OF TOURISM**

- 5.24 Types of tourism not fully welcomed by residents were also raised in the text responses. Mass number of tourists visiting Milford Sound Piopiotahi was identified. Capping or limiting the number of visitors to this site (from what they were pre-COVID-19) emerged as a key suggestion, as illustrated in these responses:

*"Tourism numbers should be capped (particularly buses)"*

*"Cap numbers at Milford Sound"*

*"Stop thousands of tourists driving into Milford every day".*

- 5.25 Addressing *freedom camping* issues was also raised (n = 10, 6.9%); a finding that coincides with the current narrative about freedom campers nationwide. The same problems associated with this form of travelling were highlighted by respondents. The responses reveal suggestions to limit or even ban freedom camping, as shown in the following:

*"Make freedom Camping very limited and they have to buy a camp ground pass on arrival no free camping and not respecting our environment and waterways"*

*"Increase in accommodation offerings for youth (to offset the appeal of freedom camping)"*

*“freedom camping needs to be addressed. No camping without an installed toilet or sites created for this purpose with sufficient ablution facilities.”*

*“Discourage those here on the cheap who defecate anywhere. Have had lots of personal experience with this.”*

*“Facilities to stop freedom camping”.*

*“Make freedom camping illegal and insist all vans users Stay at camps or pay a fee to camp at certain places. Toughen up on this by 20% and we should have numbers perfect. Precovid the freedom campers definitely were putting off my higher end guests”.*

*“Less freedom camper looking for cheap options.”*

5.26 These findings resonate with community’s aversion to budget campers and campervans uncovered through earlier engagement with the NZ Motorcaravan Association (NZMA). The NZMCA has its own camping facility, which means their members are unlikely to be cluttering public places. These local campers’ commitment to sustainable camping should also be highlighted as they are also frustrated by budget campers who give their community a bad name.

## SOCIAL AND INFRASTRUCTURE NEEDS

5.27 Another objective of this study is to assess the social and infrastructure needs in the Te Anau Basin to support increased visitor numbers. To achieve this, an open-ended question that reads, “In your opinion - what infrastructure should be built in Te Anau to support an increase in visitor numbers?”, was asked in the survey. Diverse suggestions were gathered from 154 respondents (79.38% of the sample). The bar chart below shows a long list of suggestions from the least to the most frequently coded.

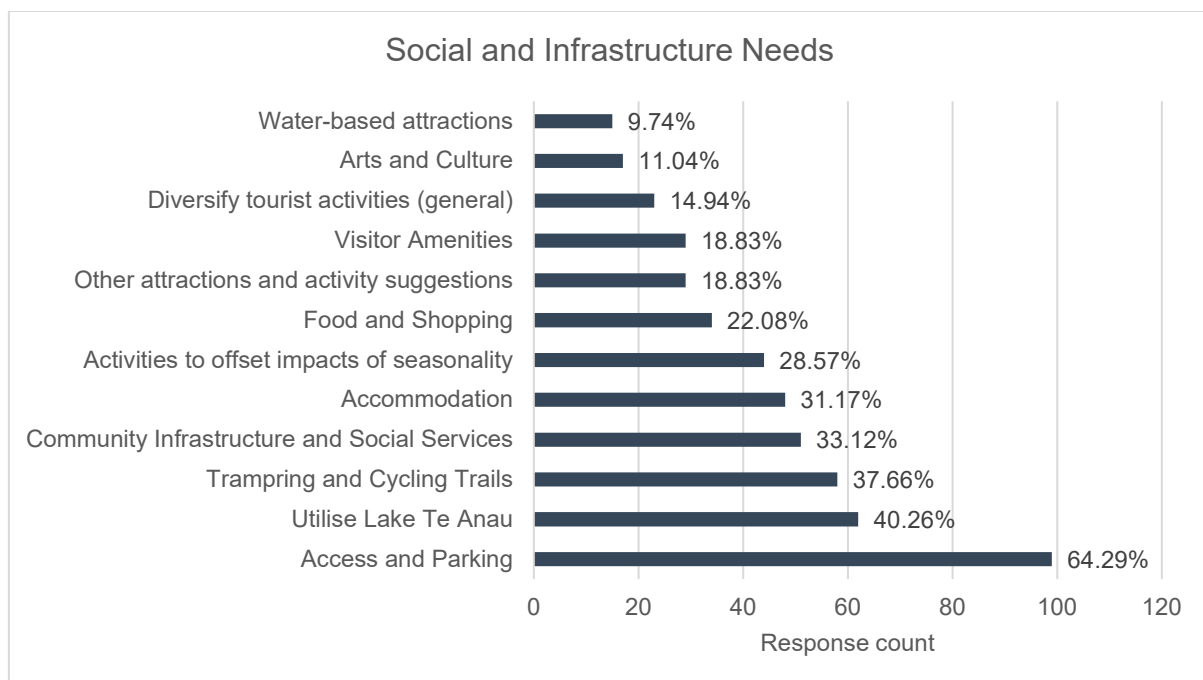


Figure 15. Social and infrastructure needs to support tourism development in Te Anau – residents’ perspectives (N=154)

5.28 A mixture of infrastructure that will cater for both locals and visitors were indicated. Topping the list is *access and parking* (n = 99, 64.29%). This was succeeded by suggestions to *utilise Lake Te Anau* (n = 62, 40.26%) more for tourism and recreation. The following sub-sections discuss these suggestions in detail.

## COMMUNITY INFRASTRUCTURE AND SOCIAL SERVICES

5.29 One of the anticipated impacts of tourism in Te Anau was the **Development of Infrastructure and Social Services**. When asked about the infrastructure needs to support tourism, residents emphasised the need to improve basic facilities and services for the community (n = 51, 33.12%). If an increase in visitor numbers is forecast, it may be necessary to enhance services for locals first (see Table 24. Community infrastructure and social services).

Table 25. Community infrastructure and social services

Facilities and services	n	%
Enhance water supply & sewage system	13	25.49
Community recreation hub	13	25.49
Swimming pool complex	7	13.73
Expand healthcare services	6	11.76
Improve public parks	3	5.88
Rubbish facilities	2	3.92
Outdoor and tourism education providers	2	3.92
Boardwalks and walkways	2	3.92
Develop low-cost housing	1	1.96
Develop retirement villages	1	1.96
Extend skate park	1	1.96

Note: Percentages were calculated based on the total response count of the theme (n=51)

5.30 The findings show various facilities identified by residents, including water supply, waste and sewage management system, a community recreational hub with sports facilities, boardwalks and walking trails in the town area, and low-cost housing. A swimming pool complex was also mentioned as a community need, mainly because of the family-oriented nature of the local community. The residents prefer to have facilities their children and families can enjoy and a space where the community can get together:

*“World class domestic water and sewage infrastructure that is future proofed for 50 + years. Not the current 20th century stopgap.”*

*“Large infrastructure like a community hub that has swimming pool skating rink or sports facilities.”*

*“Community facilities and services (e.g. public swimming pool that can be used during the day-not just outside school hours).”*

*“The community needs a place where they can interact. It would really benefit the health and wellbeing of a lot of people in the community, especially, right now.”*

*“Sports ground (a space that can bring the community together)”*

*“Increase walkways in and around the township. Develop a walkway to Lions lookout.”*

*“Low-cost housing (to keep families in the town so it does not become like Queenstown where the residents live outside of the township).”*

5.31 Expanding healthcare services for the local community was also cited. Currently, there are limited healthcare services in the area (e.g. there is only one dentist for the town). As explained in earlier chapters, medical emergency services are also busy attending to road accidents common during tourist peak season. Specific to the visitor economy, the provision of outdoor and tourism education was also suggested. Below are some of the statements that compose this key idea:

*“Outdoor education potential...from day learners to industry certifications...learning tourism could be attractive to domestic market.”*

*“More support for locals - e.g., funded mental health services.”*

- 5.32 With the current pressures on existing facilities, it makes sense to improve the development model to put more responsibility on the tourism industry to manage injuries. According to my interviewing of the health sector – the tourism industry just sends them to the medical centre and washes their hands of the whole episode. The facilities in Piopiotahi would be part of this, but it’s also along the corridor where people sprain their ankles.

**ACCESS AND PARKING**

- 5.33 The increase in visitor numbers means better transportation options to access the destination and parking facilities within Te Anau should be developed. *Access and parking* was the most dominant idea emerging from the analysis. As shown below, consistent suggestions were given by residents (see Table 25. Access and parking).

Table 26. Access and parking

Facilities and services	n	%
More carparks	29	29.29
Road development	23	23.23
Park & Ride model	22	22.22
Utilise Te Anau Airport	9	9.09
Transport hub	4	4.04
Encourage & develop public transport	4	4.04
Shuttle bus (e.g. town tours)	4	4.04
Te Anau bus service	3	3.03
Pedestrian-only main street	1	1.01

*Note: Percentages were calculated based on the total response count of the theme (n=99)*

- 5.34 In terms of access, the improvement of roads to and from Te Anau was commonly proposed (e.g. provide passing lanes along the Queenstown–Te Anau route). The Milford Road was cited again because of the number of accidents happening in this thoroughfare:

*“Some roads need some work especially around the region to make Te Anau more accessible.”*

*“The road from Queenstown to Te Anau needs some passing lanes or slow vehicle bays.”*

*“A number of passing lanes on the road to Milford Sound to improve the issues we have with the deadly combination of dawdling and rushing drivers we have in a normal season.”*

- 5.35 There is a narrative about the utilisation of Te Anau Airport too. Residents’ see the potential of developing air transport services, making the destination more accessible through direct regional and domestic flights landing to Te Anau:

*“Te Anau airport should utilised for domestic flights to make Te Anau accessible.”*

*“Airport!! What a waste of an amazing asset that currently is.”*

*“Start to plan on how to get better utilisation of the Te Anau airport, start looking at companies like Sounds Air and other similar companies to conduct flights here.”*

- 5.36 The provision of more carparks was an obvious finding from the text responses. The ‘park and ride’ transport model to service visitors going to Milford Sound Piopiotahi was a commonly proposed facility to accommodate the influx of visitors. Together with having a transport hub and better parking areas for buses, having a park and ride system was viewed as easing congestion

and decreasing accidents on Milford Road. Suggestions on where to build this transport hub were mentioned too:

*“Park and ride system for independent travellers to park their cars, to be built somewhere in town but not in the town centre - maybe in an industrial area.”*

*“Park and ride system from Te Anau to Milford Sound to limit the number of cars on Milford Road which would decrease the number accidents”.*

*“The visitors would then take a bus to Milford Sound. A park and ride should be put in place near Te Anau.”*

*“Potentially a park n ride situation, to ease congestion. With locals getting a park pass to drive own vehicles. Rec fishermen should also be able to apply for a pass to drive own vehicle & boat.”*

## ACCOMMODATION

- 5.37 Accommodation was another infrastructure requirement in the area (n = 48, 31.17%). The increase in visitor number to Te Anau will require more rooms for overnight stays. Since the vision is to transform the area into a tourist hub, residents communicated the need for different kinds of accommodation, including hotels, motels, budget hostels, and luxury accommodation. Having a ‘freedom camping’ zone with basic facilities such as toilets was also proposed to address issues associated with this form of travelling. Staff housing was also raised since more individuals coming from outside the community are anticipated to join the tourism workforce once Te Anau becomes a hub (see Table 26. Accommodation facilities and establishments).

Table 27. Accommodation facilities and establishments

Facilities and services	n	%
More hotels or motels	19	39.58
Freedom camping zones	10	20.83
Staff housing	9	18.75
Luxury accommodation	6	12.50
More affordable accommodation	3	6.25
Free campgrounds	1	2.08

*Note: Percentages were calculated based on the total response count of the theme (n=48)*

- 5.38 The selected text responses capture ideas pertaining to accommodation:

*“More motels. Not enough accommodation. Staff housing complex”*

*“High-end accommodation and activities to cater to luxury?”*

*“Freedom camping areas with toilets”*

*“Increase in accommodation offerings for youth (to offset the appeal of freedom camping)”*

*“Free camping areas or DOC camps grounds near Te Anau to cater for tourists on a budget”.*

## VISITOR AMENITIES

- 5.39 Basic facilities to support the visitor experience in the town centre also emerged as a key idea (n = 29, 18.83%). Free public toilets were the most commonly suggested facility. Other suggestions included an enhanced visitor centre, information boards and signage.

Table 28. Visitor amenities

Facilities and services	n	%
More public toilets	19	65.52
Improved visitor information centre	6	20.69
Better signage	3	10.34
Strategically locate DOC & iSite	1	3.45

Note: Percentages were calculated based on the total response count of the theme (n=48)

5.40 The following are some of the specific statement’s indicative of this theme:

*“FREE public toilets for locals and tourists to use.”*

*“More free public toilets (people are currently using the trees in the town as a toilet)”*

*“More facilities (toilets in the township- but, but not toilets that you have to pay to use)”*

*“information centre that is neutral to all businesses to ensure everyone is equally represented.”*

*“RTO hub that introduces fiordland and directs tourists to the main town centre”.*

*“Upgrade and expansion of DOC centre and/or isite, moved to the front of town (near Alpine centre) and serving as a gateway to the town with more info on things to do and see.”*

*“New and modern signs along the lake front walk”*

*“Better signage on the Milford Road as you enter town, encouraging people turn off and go down the main town centre. It’s surprising how many people drive right past the town not realising how big it is and what’s on offer (have spoken with people in Milford/Fiordland who didn’t realise they drove past a town with food and accom on the way here).”*

## FOOD AND SHOPPING

5.41 Food and beverage establishments and retail shops were also popular suggestions. The COVID-19 pandemic forced some business to cease operations – either temporary or for good – in Te Anau. Having more restaurants and retails shops will not only cater tourists, but also locals providing the latter more things to do in the area. A common narrative was the lack of shopping options (e.g., clothes and groceries), and locals envision having a shopping centre in their community (see Table 28. Food and shopping). Having more locally-owned shops was a notable response in this theme.

Table 29. Food and shopping

Facilities and services	n	%
More supermarkets	10	29.41
Retail shops	9	26.47
Food and beverage establishments	6	17.65
More night life	4	11.76
A shopping centre	3	8.82
Local shops and market	2	5.88

Note: Percentages were calculated based on the total response count of the theme (n=34)

5.42 Below are some statements that capture this key idea:

*“More bars and dining areas”*

*“In Te Anau, more upgrade of the services such as shops and the rest of it.”*



*“A large supermarket such as Pak n’ Save as Fresh Choice is only a medium size and therefore, options are limited”.*

*“Focus on small independent business which are centred around ethically sourced products and services (unique shops and stalls to highlight local produce)”*

*“A hub with many little retailer spaces so locals can sell and share their wears and experiences. That way the tourist can feel that they are meeting and getting to know the locals and not just reading fancy billboards of information which they see everywhere else throughout the country.”*

**ART AND CULTURE**

5.43 Although this theme accounted for 11.04 percent (n = 17) of the text responses, *art and culture* was considered a key idea since cultural tourism was found as an acceptable form of tourism for the local community. Telling the story of the tangata whenua through interpretive approaches is considered to enhance the visitor experience in Te Anau. Furthermore, art installations have the potential to provide more character in the town centre and surrounding areas (see Table 29. Art and culture).

Table 30. Art and culture

Facilities and services	n	%
Create Fiordland museum	15	88.24
Art installations	2	11.76

*Note: Percentages were calculated based on the total response count of the theme (n=17)*

5.44 The following are selected text responses the support this key idea:

*“There is room for a large art section including painting, photography, sculpture, music and all art in general.”*

*“more art/creative/innovative ideas and installations - make Te Anau an interesting place to visit”.*

*“Upgraded Fiordland Museum with local history and interactive displays. Great for wet weather and would enhance entire Fiordland experience.”*

*“we don’t even have a museum yet there is so much history here. there are some existing places that have potential here in town already.”*

*“An interactive Fiordland Museum displaying natural and cultural aspects of the Fiordland Area.”*

**VISITOR ATTRACTIONS AND ACTIVITIES**

5.45 The main narrative in this study is creating Te Anau as a tourism hub in the future. **Slow Experiential Tourism** emerged as one of the acceptable forms of tourism development for the local community. This model will require the creation and packaging of attractions and activities that will slow down visitors and make them stay longer.

5.46 The diversification of Te Anau attractions and activities was a general comment frequently found in the text responses. The survey provided an opportunity for residents to ideate attractions and activities that could diversify the tourism experience in Te Anau. Four themes encompassing this major category were delineated (see Figure 18. Major themes referring to visitor attractions and activities).

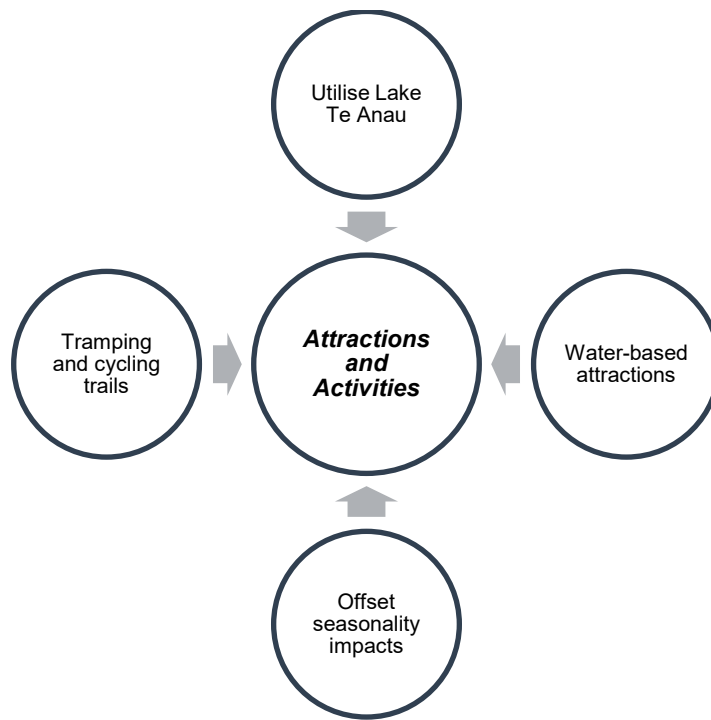


Figure 16. Major themes referring to visitor attractions and activities.

5.47 The table below lists these four theme and their respective response codes. The following sub-sections explore these themes.

Table 31. Visitor attractions and activity suggestions

Facilities and services	n	%
<b>Utilise Lake Te Anau</b>	<b>62</b>	<b>40.26</b>
Make use of Lake Te Anau (general comments)	55	35.71
Reduce lakeside parking	3	1.95
More wharf facilities	2	1.30
Cruises	2	1.30
<b>Tramping and cycling trails</b>	<b>58</b>	<b>37.66</b>
More cycling trails	40	25.97
Walking tracks (various)	17	11.04
A mountain bike park	1	0.65
<b>Activities to offset seasonality</b>	<b>44</b>	<b>28.57</b>
Activities for wet weather	27	17.53
Winter activities	17	11.04
<b>Water-based attractions</b>	<b>15</b>	<b>9.74</b>
Hot pools	13	86.67
Build water-based attractions	2	13.33
<b>Other suggestions</b>	<b>29</b>	<b>18.83</b>
Activities for kids	10	6.49
Upgrade Bird Park	3	1.95
Tree activities (e.g., canopy walks)	3	1.95
Outdoor activities	3	1.95
Market events	2	1.30
Farm tours	2	1.30
Low-cost attractions	2	1.30

Guided activities	2	1.30
Events	2	1.30

*Note: Percentages may not equal to 100%. Percentages were calculated based on the total text response count for the open-ended question (N=154).*

### UTILISE LAKE TE ANAU

- 5.48 To diversify tourism offerings in the area, utilising Lake Te Anau was a popular suggestion. This finding supports the desire for having lake-based tourism activities explored earlier. Currently, residents explain that there are more passive and active lake-based recreational activities that can be enjoyed. In the future, lakefront developments (e.g., marina, restaurant) could be explored provided that these will not affect the visual amenity of the landscape. Conversely, there were suggestion to limit parking on the lakefront. Below are selected statements referring this this key idea:

*"In town activities kayaking on the lake SUP [stand-up paddle] board hire kayaking hire activities around our water area."*

*"Something on the lakefront to appreciate the view and for locals to do. E.g. swim safely"*

*"There is need for a small decent public/commercial marina waterfront area that could support a cafe or restaurant where visitors could overlook the lake dine, walk and enjoy the scenery."*

*"When covid-19 is "over" Te Anau would be 1/2 to paradise Te Anau has a beautiful lake but yet it is mostly unused; sailing and other water based activities is needed to bring life to the lake"*

*"More hiring businesses such as sailboats, bike boats. Currently these are very restricted due to government regulations".*

*"Do not park on the lake front because this impedes the view."*

*"Campervans and buses should be banned from parking on the lake front (it spoils the view)"*

### TRAMPING AND CYCLING TRAILS

- 5.49 Tramping and cycling are one of the most preferred type of tourism from the perspective of the local community (see **Adventure and Outdoor Recreation**). Thus, enhancing and developing more trails that will accommodate tramping and cycling activities were an expected finding. During fieldwork, it was also observed that tramping and cycling are Te Anau's signature activities that complement the Milford Sound Piopiotahi experience. Accounting for 37.66 percent (n = 58) of text responses. Proposals within this key idea should be further developed and promoted. A particular focus on mountain biking trails was identified too:

*"More day walks suitable for the general tourist, or better awareness of the local walks that already exist. Example of a new tracks could be going a few hundred metres up Harts Hill to a lookout that provides views across the lake and town."*

*"Mountain biking trails would be a huge benefit for this town both nationally and internationally. We have unbelievable terrain here. We should use it."*

*"A cycle trail, dropping in front of Patience Bay, to the Perenuka Bike trail and on to Te Anau Downs. A quality "single trail" mountain bike track in the Snowden Forest, to target a completely different market from the T.A - Manapouri trail. These mountain bike tracks could be an extension to the Queenstown/Wanaka market and the Te Anau-Te Anau Downs would attract the huge NZ market that Central Otago is currently benefitting from, even with COVID restrictions".*

*"More day walks suitable for the general tourist, or better awareness of the local walks that already exist. Example of a new tracks could be going a few hundred metres up Harts Hill to a lookout that provides views across the lake and town."*

*“The only new thing needed are mountain bike trails such as in Nelson and Rotorua (the only active tourist activity currently missing in Fiordland).”*

*“Completion of the Te Anau to Manapouri cycle trail, the creation of connecting cycle trails to Mossburn and Milford Sound.”*

*“Biking! We can no longer just be hiking.”*

#### **ACTIVITIES TO OFFSET THE IMPACTS SEASONALITY**

5.50 Seasonality affects the visitor economy of Te Anau. To address this challenge, calls for more activities that can be experienced indoors and during winter times were suggested too. Winter activities such as skiing, heli-skiing and an ice-skating rink were stated. Having indoor activities benefit families as well, especially during the wet season.

5.51 Below are selected statements that support this idea:

*“Also, it would be great to offer a winter activity such as a better swimming pool complex (hot tubs, sauna, skate rink etc.) This is something Southland and Otago don't have and it would really set us apart. It would also be beneficial to our community as we are outgrowing our pool and it cannot be used in winter.”*

*“Something for visitors to do in winter, e.g., ice skate rink and hot pool combo like in Tekapo.”*

*“(Winter activity) Skiing (unlikely in National Park but would be a big boost)”*

*“Indoor archery/shooting/axe throwing. Indoor bowling/arcade/desert bar (general investment in indoor activities to suit wet weather particularly on the Main Street, to encourage foot traffic from one end to the other)”*

*“For days with poor weather, indoor facilities like a modern, interactive museum or visitors centre would be great.”*

#### **WATER-BASED ATTRACTIONS**

5.52 Water-based attractions including a waterpark and hot pools were proposed as well. These suggestions are associated with addressing the impacts of seasonality (e.g. hot pools during winter). The following are selected responses referring to this idea:

*“relaxing hot pools along the lake, looking at the mountains. People might want to spend time there coming off tracks in Fiordland. Or perhaps it was rainy cold day in Milford Sound.”*

*“Te Anau Spa Pools with great views (similar to Franz Josef). It would be a great asset for all trampers and for winter + wet days as well.”*

#### **OTHER ATTRACTIONS AND ACTIVITY SUGGESTIONS**

5.53 Residents' ideas not themed in the above ideas were listed in Table 30. Visitor attractions and activity suggestions. A range of activities that could be delivered in Te Anau were captured including kid-friendly attractions, upgrading the bird park, tree-based activities and farm tours. These suggestions are dependent on existing resources and market preferences. These ideas should be parallel with the selected forms of tourism development and Te Anau's character, to deliver a consistent message and experience to visitors.

### **RECOMMENDED OPTIONS**

5.54 The above findings provide insights into potential infrastructure requirements that planning for increasing visitor numbers will need to address on the timescales of 3, 10-15, and 25 years. This section outlines infrastructure recommendations for tourism development in Te Anau. Along with providing better access to the destination, these suggestions are in line with the preferred tourism development styles namely, *slow experiential tourism, nature-based tourism, adventure and outdoor recreation, cultural tourism, and family-based activities.*

Table 32. Development options for the Te Anau Basin

Development option	Description and rationale	Estimated cost	Timescale	Community support
Free public toilets	Establishing free public toilets in the town centre. Currently, the one close to iSite is a paid facility. There is one free toilet in Manapouri next to the boat terminal to the Doubtful Sound.	Out of scope potentially be part of Te Anua masterplan	3 years	Strong
Strategically located carparks	The lack of car parking areas was anticipated. Although supported by residents, car parks were suggested to be strategically placed, ideally not in front of the lake. This option is linked to the proposed park and ride model (e.g., visitor and transport hub).	Out of scope potentially be part of Te Anua masterplan	3, 5 to 10 years	Strong
Develop a transport hub/bus interchange in Te Anau	This will support the proposed park and ride system for visitors travelling to the Milford Sound Piopiotahi. This facility can be combined with a visitor centre but must be strategically located. Residents support this idea yet suggestions for this to be located outside of the town centre are mentioned. Other suggestions included connection to the town centre through a shuttle bus and potentially connected to the airport and marina facilities. Should be integrated with other services so that there are no adverse impacts on local businesses. Need to consider carefully how this is done. An unsolicited bid for a new site on the outskirts of town has been received and can be considered through the implementation phase.	~ \$1.9mil	3 years	Strong
Develop a Milford corridor and Piopiotahi Visitor hub in Te Anau	Should be integrated with other services so that there are not adverse impacts on local businesses. There are already at least two such centres, so need to consider carefully how this is done. Potentially, a museum can be built in this complex, together with the transport hub. This will provide indoor, all-weather and evening activities. The Te Anau facility should act as a compass point to other satellite facilities with education points along the corridor and in Piopiotahi and tell the story of Te Anau as well. The residents want this as an independent facility, ideally managed by the council instead of private entities.	~\$15.2mil	3 years	Strong

Develop a Te Anau Community Hub	A community recreation hub with sport facilities and where the community can together was a key suggestion. Integration the use of such facility for both community and tourism purposes (e.g., events) must be explored. This is an important suggestion perceived to improve community wellbeing.	Out of scope potentially be part of Te Anua masterplan	3, and 5 to 10 years	Strong
Revitalise town centre by introducing diverse food and retail establishments	This initiative should be private sector driven. There is a demand for diverse eating and shopping experiences from the locals. Ideally, residents suggest that restaurant and shops should locally owned (e.g. local artisanal shops).	Likely that the market will fill this gap, but initiative to support local entrepreneurship is vital	3, and 5 to 10 years	Strong
Develop new accommodation establishments	The community board is investigating a range of accommodation approaches in its economic development plan, including promoting "boutique" accommodation. This is considered to be more consistent with the suburban character of the area. Likely that the market will fill this gap if the access model, marketing and corridor activities are implemented as outlined as this will shift demand from Queenstown day-trip activities to more immersive packages with local accommodation within the district.	Likely that the market will fill this gap.	5 to 10 years	Strong
Develop staff accommodation in Te Anau	There is a lack of accommodation for staff in Te Anau, especially during peak season when rooms are being leased through Airbnb. Likely that the market will fill this gap. To attract more tourism and conservation workers to Te Anau there needs to be more year-round, all-weather activities. This should be developed in a coordinated way with accommodation planning in Milford Village to ensure that the scale of operation is appropriate for the requirements of tourism operators, accommodation providers and other organisations who need to keep staff overnight in Milford.	Out of scope potentially be part of Te Anua masterplan	3, and 5-10 years	Strong
Consider lakefront activities in Te Anau	A strong narrative about utilising the lake more was found in the responses. Likely the market will fill this gap. However, activities must be in accordance to environmental policies and standards.	Likely that the market will fill this gap.	3, and 5 to 10 years	Strong
Create new walking/cycling tracks	Adding more cycling and mountain biking trails will enhance the image of Te Anau as a cycling destination. This will help diversify visitor	Out of scope potentially be part of Te Anua masterplan	3, 5 to 10 years	Strong

	activities and extend overnight trips. However, this should be advertised better to reach target market.			
Enhance Te Anau airport – including scheduled air service. e.g., to Queenstown	Residents recognise the potential of the Te Anau airport. Need to consider how any park and ride hub would link with the airport, especially for private charter market in the short-term (e.g., shuttle service facilities). Any scheduled service would be demand-driven and this option is likely to be closer to the 50-year time horizon. Immediate focus should be on short-term objectives that would build capacity for future scheduled services or accelerates its objectives around the chartered market (e.g., by integrating with park and ride and improving hangar services offering with additional infrastructure, e.g., on-site accommodation offering)	Out of scope potentially be part of Te Anua masterplan	25 years	Strong

### TE ANAU VISITOR CENTRE AND TRANSPORT HUB

- 5.55 Residents’ qualitative responses suggest having a visitor experience hub and a transport hub will support tourism development in Te Anau. There is potential for these facilities to be combined into a single multi-purpose facility.
- 5.56 The current state is an unrestricted access model to Milford Sound Piopiotahi (except during times of civil defence and emergency management as occurred after the flooding in 2020). The status quo is resulting in a poor safety record and a visitor experience focused around boat cruise activity in Milford Sound Piopiotahi. The study findings showed strong support for increasing public mass transit modes of transport and spreading visitor journeys throughout the day (avoiding the big peak between 11am and 3pm). However, for Te Anau residents, maintaining private vehicle access for locals was considered important and this has been incorporated into the model design.
- 5.57 There were a wide range of views about what activities could take place in the experience hub, these included an events space for evening activities, a curated cultural/exhibition space, retail activities, i-site and ticketing offices. The activities that are recommended as forming the critical elements include:
- Induction area – health, safety, and conservation briefings
  - i-site and ticketing services
  - shuttle services to other transport nodes (e.g., airport/wharves/hotels and the town centre).
- 5.58 Delivering a transport hub to the required scale has been assessed as being best positioned in Te Anau. Other locations that were considered and discounted through the option development phase include Te Anau rural area, Te Anau Downs and Knobs Flat. Some facilities in Queenstown and Knobs Flat to support the new access model may be required, however the main facility is proposed to be sited within Te Anau offering the following benefits:
- A safe central distance from tourism sources, ensuring compliance with land transport requirements on bus drivers to take regular breaks.
  - Developable land, supporting infrastructure and services to manage an electric bus fleet.

- Located near other notable destinations in Fiordland and beyond to support longer visitor nights and spreading the benefits of tourism across a wider area, consistent with the New Zealand Tourism Strategy.
- Reinforces Te Anau's role as a hub of operations for Milford Sound Piopiotahi, giving businesses confidence to invest in accommodation, office space and multiplying the local economic benefits of tourism in partnership with Queenstown as the international gateway.

5.59 Implementing this element of the masterplan would be best delivered with input from the community and this would be best delivered as part of a comprehensive masterplan for Te Anau. This will help the council align Te Anau with the masterplan for Milford Sound Piopiotahi and utilise community-lead approaches to develop the finer details. Responses from residents suggest that as much as possible, the visitor centre and transport hub should not be located at the town centre.

5.60 Figure 19. Te Anau options for visitor centre and transport hub and Table 31. Visitor centre and transport hub location options show a conceptual analysis to support the Te Anau master planning process. Further information about this option can be found in the masterplan.



Figure 17. Te Anau options for visitor centre and transport hub



Table 33. Visitor centre and transport hub location options

TOWN CENTRE HUB	TOWN FRINGE HUB	OUT OF TOWN HUB
<ul style="list-style-type: none"> <li>• Visitors Centre (incl. ticketing)</li> <li>• Bus terminal (drop off / pick up only)</li> <li>• 30 car parks and cycle facilities</li> <li>• Jetties for water services</li> <li>• Out of town bus depot</li> </ul>	<ul style="list-style-type: none"> <li>• Visitors Centre (incl. ticketing)</li> <li>• Bus terminal (drop off / pick up and short stay coaches)</li> <li>• 60 car parks and cycle facilities</li> <li>• Jetties for water services</li> <li>• Out of town bus depot</li> </ul>	<ul style="list-style-type: none"> <li>• Visitors Centre (incl. ticketing)</li> <li>• Bus terminal (drop off / pick up and bus depot)</li> <li>• 200 car parks cycle facilities</li> </ul>

- 5.61 The introduction of this ‘park and ride’ facility will challenge existing businesses that have developed around the status quo, in particular the current bus terminals and visitor centres. These businesses may be able to adapt their operations and this should be investigated further in the next phase of the programme. Engagement directly with these businesses should be undertaken before further engagement with the market (e.g., procurement or master planning). It is expected that there may be opportunity to achieve efficiencies in the phasing approach of the access model with close cooperation with the market.
- 5.62 Although the model has been designed to include exclusions for local access, this will need careful communication with the local community and some earmarking of parking spaces for local residents who are more likely to want to make spontaneous visits. This will be considered during the implementation phase.

**ADDITIONAL SAFETY INFRASTRUCTURE FOCUSING ON UPGRADES TO AVALANCHE PROTECTION AND ROAD SAFETY**

- 5.63 With changing demands on the Milford Corridor there is a strong interest by the communities of the Te Anau Basin to see improvement in safety on the corridor. This will mean less reliance on local resources, including volunteer emergency responders and police, fire and emergency services. There is a consensus amongst stakeholders we interviewed that visitors are unprepared for the challenges of safely navigating the road and that the impacts of drivers who are driving too fast or too slow make road safety for all users a massive challenge. This explains the strong support for moving more visitors onto busses and out of private vehicles.
- 5.64 The details of the proposed infrastructure improvements are confined to Milford Road and include:
- Six basic bus stops
  - Three “robust” bus stops (at Knobs Flat, the entrance to the national park and at the reveal to Eglinton Valley)
  - Car park upgrades (at Lake Marian to support the future development of a future super trackhead)
  - Homer tunnel portal upgrades (protecting from avalanche risk and formalising places where visitors can exit their vehicles/busses to take photographs).
- 5.65 Conceptual plan for Knobs Flat and other stops are provided in the masterplan to demonstrate the scale and location of facilities. More information about costs can be found in Appendix X.
- 5.66 An analysis of accidents on State highway 94 between Milford and Mossburn over the past 10 years identified that only 4.8 percent of accidents involved busses (with about 3.5% likely a result of bus driver fault/not driving to the conditions, or animal strike). This represents a social cost of about \$3.52 million dollars compared with \$135 million for all accidents (just under 3%). According

to Chapter 4, in 2019 about 50 percent of people visited Milford on a bus and busses make up seven percent of the vehicles on the corridor. Under the proposed access model each additional bus can remove up to 16 cars (based on the average occupancy of cars and the capacity of busses at peak times). Logically, we can assume that this means less inexperienced drivers who do not know the roads, better compliance with road regulations, less risk of serious injury based on vehicle mass differentials. This means less accidents, less demand on emergency response resources and less distress for the local volunteer community and workers impacted by accidents. These benefits are expected to improve as the bus fleet grows in proportion to private vehicles and as standards are applied across the fleet and the workforce.

- 5.67 There has been only one serious injury of a cyclist on SH94 (between Te Anau and Mossburn), however there is an expectation that there will be growth in the number of cyclists throughout the region as cycleway infrastructure continues to expand and New Zealand's reputation for cycle-based tourism continues to grow. We heard from cycle groups that the Milford Road
- 5.68 Safety standards amongst bus drivers will need to be lifted as the current performance is not meeting a sufficiently high standard to support the desired international reputation for visitor safety. There are likely to be changes in road user patterns, such as more large-vehicle cross-traffic that will change the risk profiles throughout the year.
- 5.69 There has been only one serious injury of a cyclist on SH94 (between Te Anau and Mossburn) and no fatalities in the last ten years, according to CAS data, however there is an expectation that there will be growing. There are plans to increase the width of the corridor to accommodate more cyclists and this is likely to result in more cyclists using the corridor. The constraints of avoiding development of the roading network in the national park do not result in new safety risks and this will require careful management of road user behaviours.

## **INCREASE CYCLING INFRASTRUCTURE AND TRAILS**

- 5.70 The Fiordland Trails Trust and other groups (including New Zealand Cycle Trails, local councils and Te Anau Cycling Incorporated) have already invested heavily in cycleway facilities. The trails trust advocate for all accessibility tracks meaning that there is a solid foundation for continuing to build a highly accessible network. This is considered a strong economic opportunity amongst the local community and there are track counters that prove the growing list of cycleways are proving popular.
- 5.71 As mentioned, there are already a number of initiatives being advocated for by local groups, including at Eglinton Forest. A cycleway along the corridor itself would be ideal to facilitate better access to cycling tourists – this may not mean a full track but could just focus on problematic corners and shoulders.
- 5.72 Enhancement of the cycle trail network will be good for the Te Anau economy. Likewise, the development of cycling and walking trails are strongly suggested in the resident survey. Consideration of who will maintain these tracks needs to be evaluated.
- 5.73 These localised initiatives will further reduce reliance on private vehicles by visitors and benefit the local community, especially if appropriate facilities are integrated into the design. Including charging stations and other parking and maintenance facilities near retail and hospitality areas will boost economic activity. Developing infrastructure for safe crossings to reduce conflict with other road users will enable mode shift and improve safety.
- 5.74 Expanding the network with new trails in response to a reviewed national park plan will help to attract significant numbers of new visitors who are likely to spend more time in Te Anau further boosting investment in services and infrastructure and integrating with other strategic networks nearby.

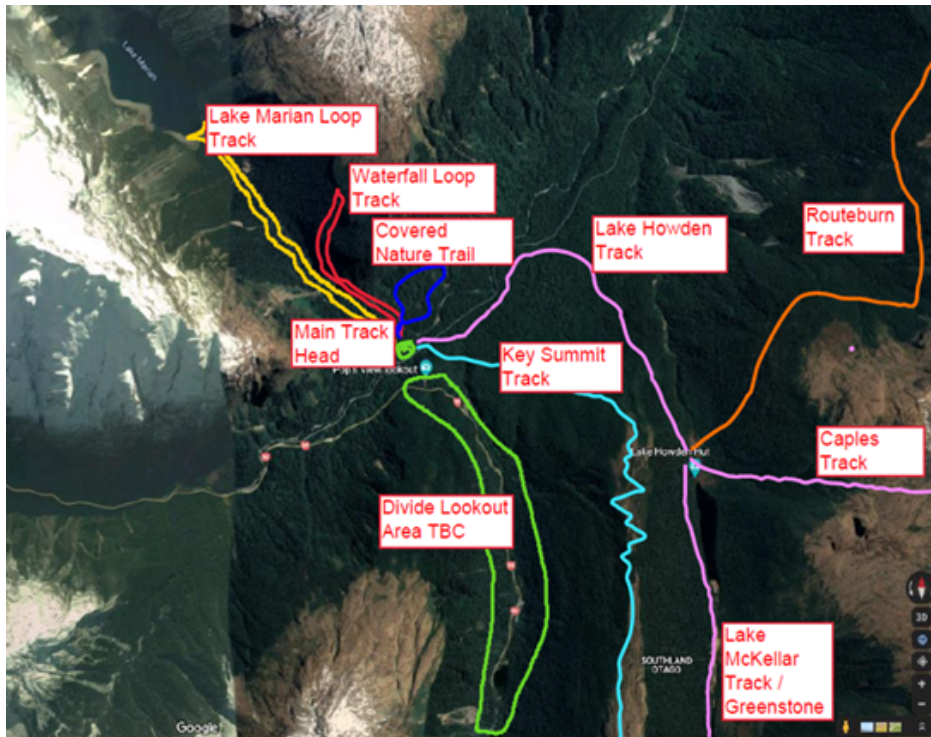


Figure 18. Cycling trails and tracks around Te Anau

- 5.75 If the proposed cycleway between Knobs Flat and Cascade Creek is developed as a day ride can likely be promoted by Te Ngā Haerenga The New Zealand Cycle National Cycleway Strategy as a Hearland (day trip) ride. Early engagement with the board, waka Kotahi and local government will help to understand where the most beneficial local opportunities exist.
- 5.76 There are proposed to be six new tracks laid along the corridor, these include new tracks from: the new proposed Super Trackhead car park new loop walking tracks to Lake Marian, Waterfall and a covered Nature trail and a single way track to Lake Howden (see) Knobs Flat - two walking tracks, one accessible and one for abled body.
- 5.77 Te Anau Cycling Incorporated consider there is already a ridable trail between Knobs Flat and Cascade Creek which could be easily formalised in parts to become an all access trail, without significant impact to sensitive receiving environments. This will be investigated in the next phase of the project along with the Knobs Flat.

## 6 SUMMARY AND CONCLUSION

- 6.1 Part of the larger tourism master planning project – the Milford Opportunities Project – this study aimed to understand the social appetite for enhancing Te Anau as a tourism hub and increasing the numbers of visitors to the area. This study analysed the social impacts of tourism and identified the social and infrastructure requirements to support the vision from the perspective of the local community.
- 6.2 To address this aim, a mixed-mode survey research design was facilitated with local community members in February 2021. This approach allowed for consultation and engagement with the people who will serve as tourism’s beneficiaries. In doing so, the local community was able to communicate their views and ideas towards the future of tourism in Te Anau. Several insights were uncovered following the study objectives.

### IMPACTS OF TOURISM

- 6.3 The first objective of this study was to *identify the potential opportunities and impacts for the Te Anau Basin of increasing visitor numbers*. Although positive outcomes of tourism were found, anticipated negative consequences raised by residents were also delineated.
- 6.4 Te Anau residents recognised tourism as a catalyst for economic development. Since tourism is a large part of Te Anau’s economy, the locality is viewed to become a ‘prosperous community’ if tourism is developed sustainably. Potential economic benefits on livelihoods and the wider community in the forms of jobs business opportunities and other income-generating activities were identified to occur as immediate and long-term impacts of tourism.
- 6.5 However, negative economic impacts were also anticipated, such as an increase in the cost of living associated with future housing shortage, increase property prices and rates, and expensive price of goods. Potential overdependence on tourism must also be avoided. As observed in other locations, too much reliance on tourism weakens an area’s economic resilience especially if crises such as the current pandemic occur.
- 6.6 Although there is optimism regarding increasing support for nature conservation, there were a wide range of comments received concerning the negative consequences of tourism on the natural environment. If visitor numbers continue to grow and irresponsible visitor behaviours are uncontrolled, residents were worried about the degradation of the environment, overuse of resources and other negative effects on landscape aesthetics. Nature is the main attractor for visitors to Te Anau, and residents are highly aware and proud of their natural surroundings.
- 6.7 In terms of desirable socio-cultural impacts, an increase in cultural and ethnic diversity was forecast by residents together with an increased sense of community pride. However, one of the most notable findings was residents’ concerns regarding their quality of life. There was a dominant perception of a lowered quality of life as a result of the changes tourism will bring. Losing a sense of community, increase in crime, overcommercialisation, loss of quietness and relaxed atmosphere and expensive cost of living, are some of the factors viewed to affect the quality of life of Te Anau residents in the future.
- 6.8 The development of infrastructure and social services that will serve locals and tourists was also seen as a result of tourism development. Together with economic benefits, residents’ see the value of infrastructure and services for their community. Pressure on the existing infrastructure and services in Te Anau from too much user demand was raised as an immediate impact of tourism. Due to crowding and traffic (survey items that were highly rated), residents explicate current facilities in Te Anau will not be able to cope if tourist numbers increase. Infrastructure recommendations were elicited from the residents and analysed by theme.

## SOCIAL AND INFRASTRUCTURE NEEDS

- 6.9 The second objective of this study was to *assess the social and infrastructure needs in the Te Anau Basin to support increased visitor numbers*. A number of social needs and infrastructure requirements were delineated from the perspective of the local community.
- 6.10 In terms of social needs, demand for more healthcare services and ‘community-building’ facilities was identified from residents’ statements. Medical practitioners such as doctors, dentists and mental health professionals were identified as immediate social needs; these are requirements that are not tourism-related but were highlighted in residents’ narratives. A community recreation hub with sport facilities where the community can gather was a key suggestion too.
- 6.11 In terms of tourism-related infrastructure, access and parking were key ideas put forward by residents. Visitor amenities such as free public toilets are immediate needs as well. Currently, there is one public (paid) toilet near the visitor centre, and two other public toilets in the township up by the commercial spaces near the Southland District office and public library.
- 6.12 Increasing visitor numbers will require more accommodation facilities, not just for visitors but for staff as well. It was apparent that Te Anau imports its tourism workforce from outside the community (e.g., working holiday). Other infrastructure requirements that can be delivered by the private sector include food, beverage and retail establishments. Findings implied that the provision of these commercial establishments must originate from local entrepreneurs.
- 6.13 Diversifying visitor attractions and activities is a clear direction for Te Anau. Apart from creating art and culture facilities, four themes of visitor attractions and activity suggestions were delineated:
- Utilising Lake Te Anau
  - Tramping and cycling trails
  - Activities to offset the impacts of seasonality
  - Water-based attractions
- 6.14 These suggestions were found to be aligned with the acceptable forms of tourism development in the community.

## FORMS OF TOURISM DEVELOPMENT

- 6.15 There is a strong level of community support for tourism. However, this level of support should be maintained by making sure the type of tourism developed in Te Anau aligns with community aspirations. The third objective of this study was to identify the type/style of development that is most acceptable (to the local community). Five themes emerged from the residents’ statements.
- 6.16 The first three themes – *slow experiential travel, nature-based tourism, and adventure and outdoor recreation* – were the most acceptable forms. These tourism development forms were also seen to overlap with each other. Adventure and outdoor recreation undertaken in nature is preferred. Activities tied into these models may also ‘slow down’ visitors, allowing them to immerse themselves in nature and the community.
- 6.17 Celebrating Ngai Tahu stories through cultural tourism was understood to enhance the visitor experience, as well. At present, there is limited integration of Ngai Tahu’s heritage in the tourism product offerings. Although some operators are working closely with Ngai Tahu to deliver this.
- 6.18 Family-oriented tourism experiences were also cited. Apart from attracting family tourists, creating amenities and activities for this market may also cater to the needs of local families living in Te Anau.

## TOURISM INFRASTRUCTURE DEVELOPMENT

- 6.19 Finally, this study suggested infrastructure requirements that planning for increasing visitor numbers will need to address on the timescales of 3, 10-15, and 25 years; and estimated the costs of providing for infrastructure provisions relating to the MOP masterplan. Additional developmental costs (not part of the MOP masterplan study) would need to be determined as part of Te Anau masterplan.
- 6.20 Te Anau residents envision a prosperous community that protects its natural resources and keep the relaxed rural lifestyle. In line with this vision and the acceptable forms of development in the area, the following are recommended options for infrastructure development:
- Free public toilets
  - Strategically located carparks
  - Develop a transport hub/bus interchange in Te Anau
  - Develop a visitor hub that showcases the Milford Sound Piopiotahi and Milford corridor experience in Te Anau
  - Develop a Te Anau Community Hub
  - Revitalise town centre by introducing diverse food and retail establishments
  - Develop new accommodation establishments
  - Develop staff accommodation in Te Anau
  - Consider lakefront activities in Te Anau
  - Create new walking/cycling tracks
  - Enhance Te Anau airport – including scheduled air service.

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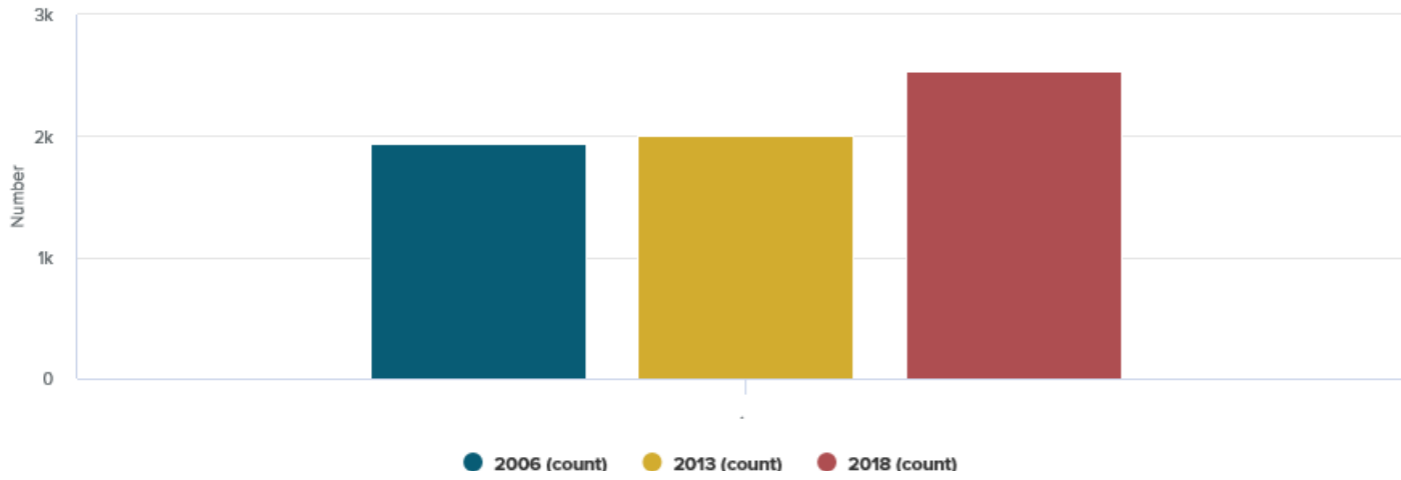
## APPENDIX 1: THE PEOPLE OF TE ANAU

The following statistics provide a snapshot of the Te Anau/Manapōuri community from the 2013 and 2018 census (Statistics New Zealand website). These statistics have been used to develop representative profiles of the community that will be used to develop the impacts of the masterplan on various parts of the community. Te Anau Statistics from 2018 Census

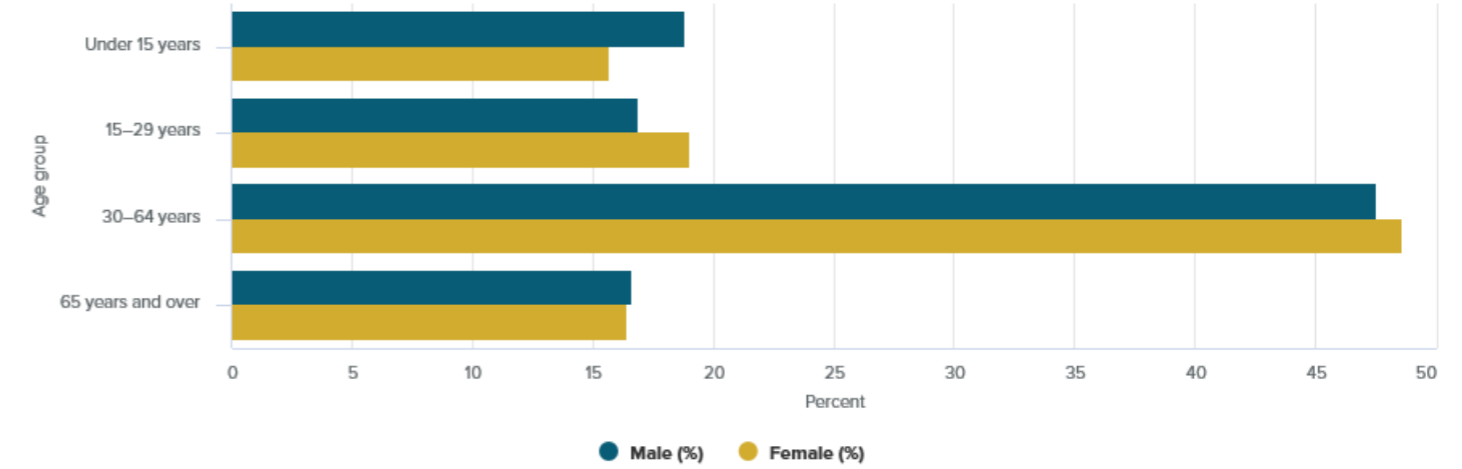
Population				Migration			Relationship Status		
<b>Number of people</b> 2,538	<b>Median age</b> 39.4	<b>Males</b> 1,263	<b>Females</b> 1,278	<b>Lived overseas 1 year</b> 3.9%	<b>5-9 years since NZ arrival</b> 17.4%	<b>Never married or civil union</b> 35.2%	<b>Married, not separated</b> 50.2%		
Children			Ethnicity			Birthplace			
<b>No children</b> 34.2%	<b>One child</b> 11.8%	<b>Three children</b> 19.6%	<b>European</b> 82.9%	<b>Māori</b> 8.4%	<b>Māori descent</b> 10.9%	<b>Born in NZ</b> 74.3%	<b>Born overseas</b> 25.6%		
Work		Occupation				Income			
<b>Employed full-time</b> 61.4%	<b>Unemployed</b> 0.9%	<b>Manager</b> 17.3%	<b>Professional</b> 13.8%	<b>Trade</b> 15.5%	<b>Labourer</b> 15.1%	<b>No income</b> 1.9%	<b>\$40-50k</b> 12.7%	<b>Over \$70k</b> 11.9%	
Education			Qualifications			Access to Telecommunications			
<b>Full-time study</b> 14.7%	<b>Part-time study</b> 2.6%	<b>No studying</b> 82.9%	<b>None</b> 18.5%	<b>Diploma</b> 6.3%	<b>Bachelor's</b> 12.9%	<b>No access</b> 1.6%	<b>Internet</b> 85.3%	<b>Cell/mobile</b> 93.2%	
House Ownership / Rent		Travel to Work				Travel to Education			
<b>Own house</b> 50.8%	<b>Median weekly rent</b> \$250	<b>Car</b> 46.8%	<b>Public Bus</b> 0.6%	<b>Walk</b> 14.7%	<b>Work at Home</b> 11.8%	<b>Car</b> 32.2%	<b>Public Bus</b> 1.4%	<b>Walk</b> 17.1%	<b>Study at Home</b> 6.2%



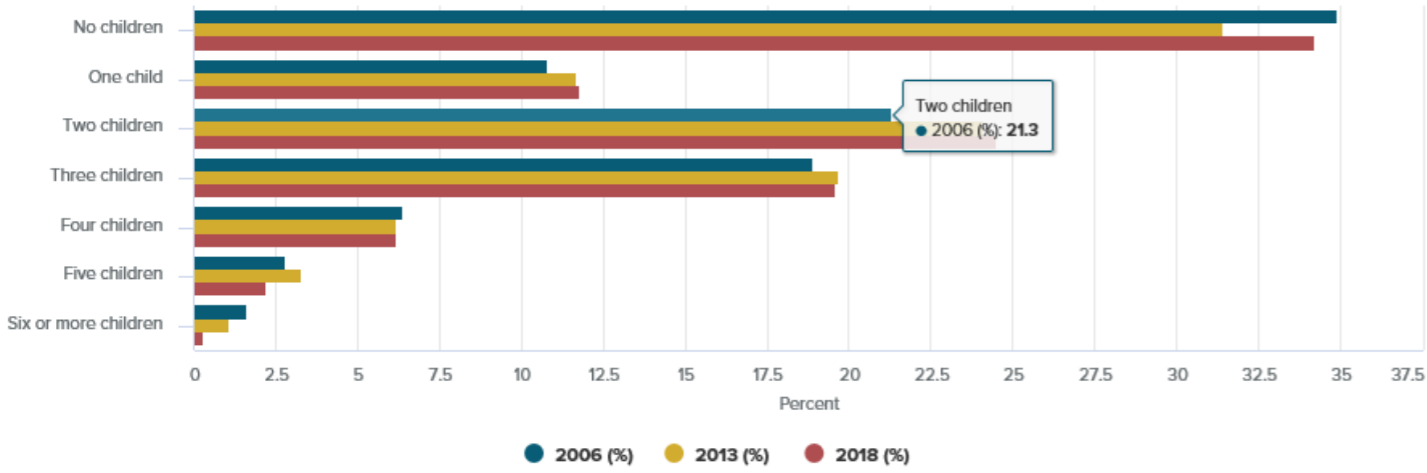
Population in Te Anau, 2006–18 Censuses



Age and sex of people in Te Anau, 2018 Census



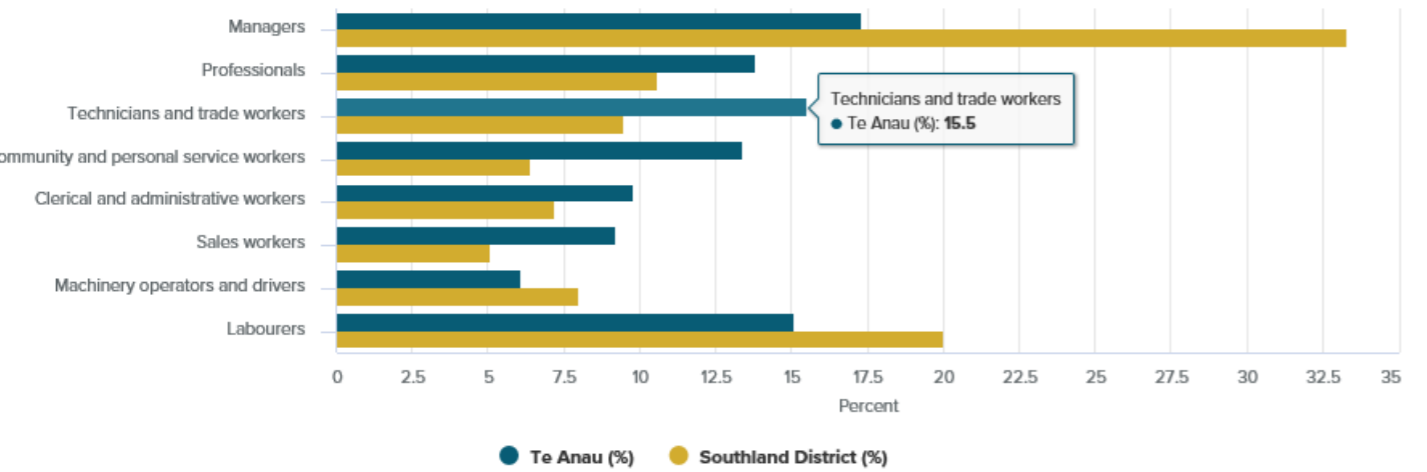
Number of children born to each female in Te Anau, 2006–18 Censuses



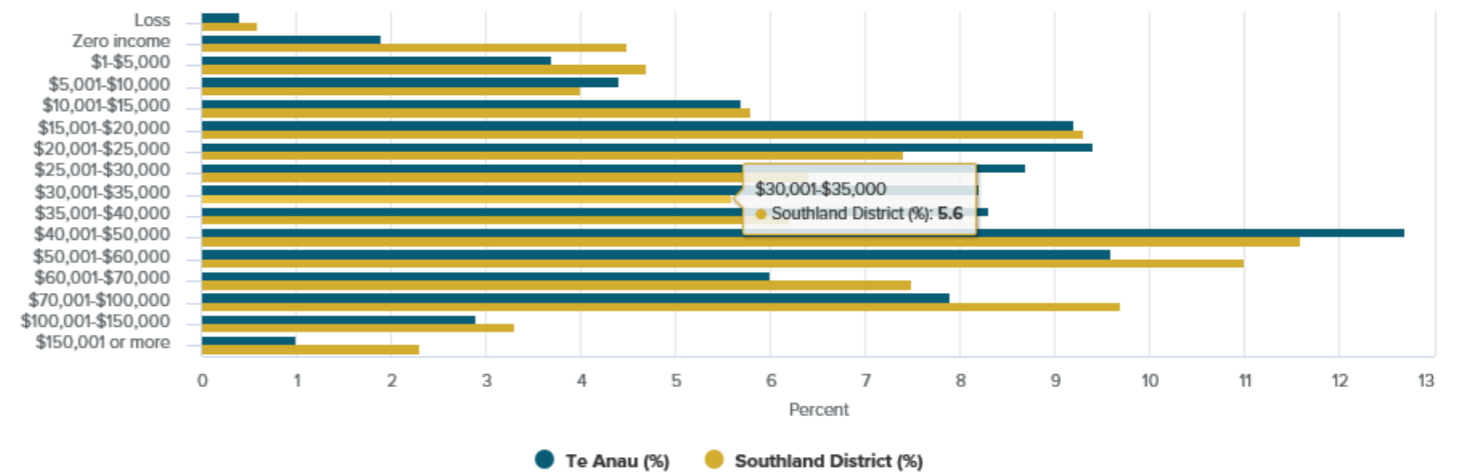
Ethnic groups for people in Te Anau, 2006–18 Censuses

	2006 (%)	2013 (%)	2018 (%)
European	76.1	89.5	82.9
Māori	7.1	8.4	8.4
Pacific peoples	0.5	0.8	1.1
Asian	4.4	5.9	11.8
Middle Eastern/Latin American/African	0.5	1.6	2.1
Other ethnicity	19.6	2.3	1.7

Occupations for people in Te Anau and Southland District, 2018 Census



Total personal income for people in Te Anau and Southland District, 2018 Census



## APPENDIX 2: TE ANAU RESIDENTS SURVEY: IMPACTS OF TOURISM ON THE COMMUNITY

### Introduction

Kia ora! Te Anau is the key town on the Milford Sound Piopiotahi journey. Along with Manapouri, there is potential to develop and cater for increased visitor numbers within the Te Anau Basin.

This survey asks you as residents of the area what you think about the possible impacts of tourism. It asks you to think in the longer term past the current COVID-19 constraints.

The survey will take most people between 5-10 minutes to complete. Thank you for your assistance here.

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### Part 1. Your background

#### 1) Are you a resident of the Te Anau Basin area?

- Yes - live in Te Anau
- Yes - live in the nearby area
- No - live outside of the Te Anau Basin

***If NO, please state where.***

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***If YES, How long have you lived there?***

- < 2 years
- 2- 5 years
- 5 years plus

#### 2) How old are you?

- Under 20
- 20-29
- 30-39
- 40-49
- 50-59
- 60 plus

**3) Are you aware of the Milford Opportunities Project?**

Yes  No

***If Yes, have you participated in any earlier research, consultation or engagement about it?***

Yes  No

**4) PRE-COVID-19, what was your level of involvement in tourism in and around Te Anau?**

Not involved at all

Somewhat involved

Involved

Highly involved

***If applicable to you, please briefly describe your involvement in tourism pre-COVID-19, and your involvement in tourism at present (e.g. with COVID-19 impacts).***

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## Part 2. Your opinions on the Social Impacts of Tourism

Please respond based on how Tourism conditions were PRE-COVID-19.

5) Assuming PRE-COVID-19 tourism numbers applied, what do you think the social impacts would be from increasing the numbers of visitors to Te Anau further (to higher levels than those PRE-COVID-19)?

*(e.g. Te Anau was enhanced as a destination and as a tourism hub for the wider region)*

	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree
Improve my income and standard of living	( )	( )	( )	( )	( )
Increase local employment opportunities	( )	( )	( )	( )	( )
Increase the cost of living	( )	( )	( )	( )	( )
Diversify recreational activities	( )	( )	( )	( )	( )
Improve recreational facilities and infrastructures (e.g. cycling trails, parks)	( )	( )	( )	( )	( )
Increased support for nature conservation	( )	( )	( )	( )	( )
Opportunity to tell the story of the whenua	( )	( )	( )	( )	( )
More crowding in public spaces	( )	( )	( )	( )	( )
Worsen traffic conditions	( )	( )	( )	( )	( )
Enhance the community's sense of pride	( )	( )	( )	( )	( )
Maintain original lifestyles	( )	( )	( )	( )	( )

Improve the quality of life in general	( )	( )	( )	( )	( )
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**6) Apart from the potential impacts above, are there any other impacts that you think could emerge due to increased visitor numbers to Te Anau?**

*(beyond what they were PRE-COVID-19)*

( ) Yes ( ) No

***If Yes, what other impacts?***

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### Part 3. Your opinions on Tourism

**7) In general terms, what are your feelings about tourism in Te Anau?**

- ( ) Strongly oppose
- ( ) Oppose
- ( ) Neither oppose nor favour
- ( ) Favour
- ( ) Strongly favour

**8) Thinking about PRE-COVID-19 tourism visitor volumes in Te Anau, what was your opinion about their levels then?**

- ( ) They should have been significantly reduced
- ( ) They should have been somewhat reduced
- ( ) No change - the volumes were about right
- ( ) They should have been somewhat increased
- ( ) They should have been significantly increased

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## Part 4. Your opinions on Future Tourism Development

9) In your opinion - if more tourism infrastructure was developed and visitor numbers to Te Anau increased, what would be the main social impacts over the next 10 to 25 years?

*(assume that COVID-19 impacts decrease)*

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10) In your opinion - what infrastructure should be built in Te Anau to support an increase in visitor numbers?

*(assume that COVID-19 impacts decrease)*

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11) Finally, in your opinion - what kind of tourism should be occurring in and around Te Anau?

*(e.g. style of tourism, type of tourist, activity types, etc.)*

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## Thank You!

Thank you for taking our survey. Your response is very important to us.

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## APPENDIX 3: RESPONDENTS' INVOLVEMENT IN TOURISM PRE-COVID-19 AND AT PRESENT

### Tourism involvement pre-COVID-19

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	55	28.4	28.4	28.4
Tourism staff	44	22.7	22.7	51.0
Accommodation business owner	14	7.2	7.2	58.2
Hospitality staff	14	7.2	7.2	65.5
Airbnb provider	7	3.6	3.6	69.1
Employee (general)	7	3.6	3.6	72.7
Tourism business owner	7	3.6	3.6	76.3
Hospitality business owner	4	2.1	2.1	78.4
Tourism staff (casual)	4	2.1	2.1	80.4
Business owner (non- tourism)	3	1.5	1.5	82.0
Business owner (general)	3	1.5	1.5	83.5
Employee (retail)	3	1.5	1.5	85.1
Government employee	3	1.5	1.5	86.6
Accommodation and Tourism business owner	2	1.0	1.0	87.6
Business owner (auto repair)	2	1.0	1.0	88.7
Business owner (cleaning services)	2	1.0	1.0	89.7
Construction	2	1.0	1.0	90.7
Rental owner	2	1.0	1.0	91.8
Accommodation business owner	1	.5	.5	92.3
Business consultant	1	.5	.5	92.8
Business owner (construction)	1	.5	.5	93.3
Business owner (retail)	1	.5	.5	93.8
Community service provider	1	.5	.5	94.3
Contractor (government)	1	.5	.5	94.8
Education	1	.5	.5	95.4
Employee (traffic)	1	.5	.5	95.9
Event organiser	1	.5	.5	96.4

Hospitality staff (casual)	1	.5	.5	96.9
Investor	1	.5	.5	97.4
Photographer	1	.5	.5	97.9
Student	1	.5	.5	98.5
Supplier	1	.5	.5	99.0
Tourism company	1	.5	.5	99.5
Transport provider	1	.5	.5	100.0
Total	194	100.0	100.0	

**Tourism involvement at present**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	65	33.5	33.5	33.5
Tourism staff	25	12.9	12.9	46.4
Accommodation business owner	10	5.2	5.2	51.5
Hospitality staff	9	4.6	4.6	56.2
Airbnb provider	5	2.6	2.6	58.8
Tourism staff (casual)	5	2.6	2.6	61.3
Hospitality business owner	4	2.1	2.1	63.4
Employee (general)	3	1.5	1.5	64.9
Employee (retail)	3	1.5	1.5	66.5
Government employee	3	1.5	1.5	68.0
Rental owner	3	1.5	1.5	69.6
Retired	3	1.5	1.5	71.1
Tourism business owner - reduced customer	3	1.5	1.5	72.7
Tourism staff - reduced	3	1.5	1.5	74.2
Accommodation business owner - reduced occupancy	2	1.0	1.0	75.3
Business owner (non-tourism)	2	1.0	1.0	76.3
Business owner (auto repair)	2	1.0	1.0	77.3
Business owner (general)	2	1.0	1.0	78.4
Construction	2	1.0	1.0	79.4
Forced retirement	2	1.0	1.0	80.4
Tourism business owner	2	1.0	1.0	81.4
Unemployed	2	1.0	1.0	82.5



Accommodation and Tourism business owner - reduced occupancy	1	.5	.5	83.0
Accommodation business owner - closed	1	.5	.5	83.5
Accommodation business owner	1	.5	.5	84.0
Airbnb provider - reduced occupancy	1	.5	.5	84.5
Business consultant	1	.5	.5	85.1
Business owner (non-tourism) - reduced customers	1	.5	.5	85.6
Business owner (cleaning services)	1	.5	.5	86.1
Business owner (cleaning services) - reduced customers	1	.5	.5	86.6
Business owner (construction) - reduced	1	.5	.5	87.1
Business owner (non-tourism)	1	.5	.5	87.6
Business owner (retail)	1	.5	.5	88.1
Community service provider	1	.5	.5	88.7
Contractor (government)	1	.5	.5	89.2
Education	1	.5	.5	89.7
Employee (general) - reduced	1	.5	.5	90.2
Employee (general) - reduced hours	1	.5	.5	90.7
Employee (non-tourism)	1	.5	.5	91.2
Employee (real estate)	1	.5	.5	91.8
Employee (retail) - closed	1	.5	.5	92.3
Employee (traffic)	1	.5	.5	92.8
Event organiser - reduced clients	1	.5	.5	93.3
Farmer	1	.5	.5	93.8
Hospitality business owner - reduced customers	1	.5	.5	94.3
Hospitality staff (casual)	1	.5	.5	94.8
Investor	1	.5	.5	95.4
None	1	.5	.5	95.9

Not involved	1	.5	.5	96.4
Not tourism-related	1	.5	.5	96.9
Photographer	1	.5	.5	97.4
Reduced hours	1	.5	.5	97.9
Student	1	.5	.5	98.5
Supplier	1	.5	.5	99.0
Tourism company	1	.5	.5	99.5
Transport provider	1	.5	.5	100.0
Total	194	100.0	100.0	