MILFORD OPPORTUNITIES

MILFORD OPPORTUNITIES PROJECT

Tourism Report

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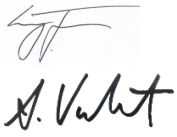
Reviewed by:	Craig Jones & Shane Vuletich Visitor Solutions Ltd & Fresh Info Ltd	
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EXECUTIVE SUMMARY

This report summarises the tourism workstreams component of the Milford Opportunities Project.

The first part of the report summarises insights and analysis relating to current and past tourism in Milford Sound Piopiotahi. From a demand perspective it addresses the numbers and types of visitors; the activities they engage in; the trends, sites, and patterns for these activities; the visitor experience outcomes being achieved from visits; and any use issues that currently (or could potentially in future) compromise the achievement of visit objectives for the visitor and the community. From a supply perspective it summarises the services, infrastructure and businesses that enable recreation and tourism activity to take place.

The second part of the report evaluates a range of possible options for improvements based on the insights and analysis referenced above and the views of operators and recreationists regarding the future of Milford Sound Piopiotahi. Finally, recommended options are proposed with required actions specified.

The scope of the project incorporates the primary Milford Sound Piopiotahi area, along with the connected Milford Road Corridor and the supporting Te Anau/ Wider Fiordland area. All are part of a comprehensive approach that does not focus solely on Milford Sound Piopiotahi but places it in a wider regional context incorporating Te Anau, Manapouri and wider Southland.

INSIGHTS AND ANALYSIS

Below we summarise the main insights, issues and opportunities that were identified during the baseline investigation stage of the project and informed the optioning process for the tourism workstreams.

VISITOR NUMBERS

There were approximately 870,000 visitors to Milford Sound in the 2019 calendar year. The number of people visiting Milford Sound has grown by 69% over the last 13 years, or 4.1% per annum. Almost all of this growth has occurred in the last five years. Visitors to Milford Sound are predominantly from overseas (83%) with only 17% originating from New Zealand.

According to the International Visitor Survey, more international visitors to New Zealand go to Milford Sound (and other locations in Fiordland) than to any other attraction covered by the survey. This demonstrates Milford's importance as a pre-eminent New Zealand visitor icon and its marketing reach overseas.

SEASONALITY AND INTRA-DAY VISITOR FLOWS

Visitation to Milford Sound is highly seasonal, with 62% of visitors arriving in the 5 months between November-March and 27% of visitors arriving in the 2 busiest months, January and February. The strong seasonality creates infrastructure pressures in peak months and leaves operators with relatively low income during the rest of the year. These conditions are likely to be deterrents to new investment.

The "cul-de-sac" nature of SH94, combined with the lack of accommodation in Milford Sound Piopiotahi, means that almost all visitors enter and exit Milford Sound Piopiotahi on the same day. This creates a "tidal" flow of visitors.

The inbound vehicle flow peaks between 8am and 1pm, and the outbound flow begins at around midday. The tidal pattern of visitation causes significant congestion at the Homer Tunnel in the late morning/early afternoon period when the two flows meet. It also creates congestion in Milford Sound Piopiotahi itself between ~11am-3pm, with the average number of vehicles in Milford Sound Piopiotahi peaking at around 450 at 1pm. The high concentration of visitors in the middle of the day creates issues with parking availability and overcrowding which are detracting from the visitor experience.

The average utilisation rate of the cruise vessels operating in Milford Sound Piopiotahi varies between 23% in August and 52% in February, with an average across the year of 40%. These utilisation rates are calculated against scheduled capacity which is only a subset of total capacity i.e., boat owners could schedule more cruises outside peak demand periods if there was sufficient demand to support them.

The main constraint on growth is the time of day that passengers arrive in Milford Sound Piopiotahi, rather than the overall number of visitors.

With a more uniform demand profile across the day, it would be possible for Milford Sound Piopiotahi to absorb more visitors while at the same time reducing congestion in Milford Village.

TRAVEL PATTERNS

Approximately 95% of visitors to Milford Sound Piopiotahi access it by road (828,300 in calendar year 2019). There were 193,500 inbound vehicle movements in 2019, of which 91% were private vehicles (cars and campervans). Buses (tour coaches and small buses) carried 50% of passengers while only accounting for 9% of vehicle movements. Those arriving via air accounted for 5% of visitation. Around two thirds of seat capacity was in fixed wing aircraft and the remaining one third was in helicopters.

Around 55% of international visitors to Milford Sound Piopiotahi stay overnight in the local area (Milford Sound Piopiotahi/Milford corridor/Te Anau/Manapouri). The remaining 45% are day visitors from further afield, predominantly Queenstown, which is an 8+ hour return drive. The prevalence of day-tripping negatively impacts on local value capture, congestion, and the visitor experience.

Most visitors to Milford Sound Piopiotahi who stay overnight in the local area stay in Te Anau (79% of visitor nights). A further 17% stay in Milford Sound Piopiotahi itself or the Milford corridor and 4% stay in Manapouri (Figure 6). 90% of all international overnight visitors to Manapouri, and 83% of all international overnight visitors to Te Anau, also visit Milford Sound Piopiotahi (Figure 7). It is reasonable to assume that a lot of this visitation would not occur in the absence of Milford Sound Piopiotahi.

VISITOR SPENDING

MBIE estimates that domestic and international visitors spent $249 million in the Fiordland economy in 2019 which includes Te Anau, Manapouri, and Milford Sound Piopiotahi. Further analysis indicates that approximately 77% of this expenditure, or $191 million, is spent by people who visit Milford Sound Piopiotahi. This emphasises the critical importance of Milford Sound Piopiotahi to the local economy, while also highlighting the opportunities an optimised Milford Sound Piopiotahi would create for social and economic development in the region.

VISITOR EXPERIENCE

Most visitors make a day trip to Milford Sound Piopiotahi as their primary trip purpose. Most of these also engage in visits to a small selection of key short-stop attraction sites along the Milford Corridor. This occurs for both self-drive and coach-based travel, with self-drive visitors having more site and visit-time flexibility (including the option for a few of camping in the Corridor as a Milford visit base). A very much smaller portion of visitors to the area are making their trips primarily to sites in the Corridor to engage in a variety of specific day trip or multi-night (often camping-based) activities along the Corridor or accessed from it.

The Milford Sound Piopiotahi experience is predominantly centred around boat cruises and first time/one-off visitors. Around 95% of visitors to Milford Sound Piopiotahi take a cruise, with the remaining 5% engaging in kayaking or walking (e.g., on the Milford Track which terminates at Milford Sound Piopiotahi). Very few visitors appear to engage in other activities around the village area, with the possible exception of the Milford Foreshore walk.

Evaluations of visitor experiences in Milford Sound Piopiotahi are highly positive overall. For example, from 1,000 TripAdvisor reviews of visits made to Milford Sound Piopiotahi, almost all visitors (96%) rated their overall experience ‘Very good’ or ‘Excellent’. The accompanying text comment components of the reviews were also predominantly positive (97%). Around half of the reviews included some specific ‘visit recommendation’ content and most of the remainder (48%) were highly positive (but contained no specific ‘visit recommendation’).

Negative aspects within the overall experience were noted by some but these were often qualified by reference to positive aspects (e.g., most notably that bad weather resulted in good waterfalls) and overall evaluations emerged as positive.

Negative aspects noted in reviews (and from past research studies) included weather (commonly qualified); aircraft noise, cruise boats and ships, crowding, visitor behaviour, service quality, unfulfilled expectations, and environmental factors. Some of these appeared more significantly negative for people participating in 'remote-experience/wilderness' types of activities around Milford Sound Piopiotahi (e.g., climbers using Homer Hut) or activities not associated with the mainstream tour-boat activities (e.g., Deepwater Basin users, private boaties), and among people with a more extended presence/history in the Milford Sound Piopiotahi area (e.g., workers in the village). Even among those citing higher levels of negative impacts (e.g., Deepwater Basin Users), however, the overall activity satisfaction expressed was high.

MILFORD SOUND PIOPIOTAHI VISITOR ENVIRONMENT

The Milford Sound Piopiotahi village is run down, poorly planned and lacks the design integrity one would expect from a world-class tourism attraction. This results in unnecessary crowding, reduced revenue generation and poorer experiential outcomes.

Milford Sound Piopiotahi does not have a compelling context or narrative woven through it – it is only about the landscape. Adding a pre- and/or post-colonial narrative could create significant additional value and would provide an opportunity for Mana Whenua values and stories to be reflected in the visitor experience.

While perceived negative aspects of Milford Sound Piopiotahi are generally highly outweighed by the quality of the overall landscape and visitor experience, they do represent areas of visitor experience quality compromise. In this respect they represent key opportunities for improvement.

The Milford Road is a significantly positive component of the overall visitor experience, with Milford Road and Corridor Activities being among the top positive themes in the 1,000 TripAdvisor review comments that were analysed in detail.

DOC SITE USAGE

Use of DOC campgrounds in the Milford Corridor has increased rapidly in recent years. Annual combined use of the eight DOC Conservation Campsites between Te Anau and Milford Sound in 2018-2019 was 400% (45,000) higher than in 2013-2014 (Figure 8).

By volume Cascade Creek has had the most growth in usage since 2014 (higher by >400%/32,000), with other sites following to varying degrees. Cascade Creek is the last accommodation option before reaching Milford Sound Piopiotahi and is often used by those on early boats.

Many DOC tracks have grown in popularity over the past ten years, in some locations dramatically (e.g., Lake Marian, Gertrude Valley). For example, the number of annual users of the Lake Marian Track has increased by around 300% in the last 5 years (Figure 9). The Lake Marian track is located a short distance down the Hollyford Road after the turnoff from the Milford Highway.

Around Te Anau the day use activities associated with Brod Bay in particular have also appeared to increase strongly. Use of Te Anau Visitor Centre itself however has been static over recent years, despite wider general tourism growth.

RECREATION CONCESSIONS

In May 2020 there were 282 concession-holders with a total of 397 individual concessions associated with Milford and Fiordland National Park. These break down to 259 'Recreation' concession holders with 319 recreation concessions, and 30 'Infrastructure' concession holders with a total of 76 infrastructure concessions (built facilities facilitating recreation activity and some non-recreation needs).

The largest volume of 'recreation' concessions relate to guiding of visitor experiences (176 concession holder), which are associated mostly with walking experiences (short-stop or part-day/day/multi-day trips), and to a lesser extent more specialised recreation activities such as kayaking, packrafting, photography and climbing. However, around 13 operators provide boat cruise options through marine mammal watching permits which account for the bulk of visitor activity at Milford Sound. Many of these include associated coach services as well.

MASTER PLAN RECOMMENDATIONS

After a rigorous process of longlisting and shortlisting[1] of potential interventions, a recommended master plan option was reached. This involved a suite of interventions that collectively add value to the visitor experience whilst also improving visitor safety and creating revenue opportunities to help fund the project (capital and operational, including experiential and risk management plus conservation). The elements of the Recommended Option relevant to tourism are summarised below. Attention is first directed towards general network issues, then Te Anau and surrounds, the corridor and finally Milford Sound Piopiotahi itself.

ACCESS MODEL

From a tourism and recreation perspective an access model that enables some degree of flexibility is favoured. This is best reflected in 'mixed access model A' which is largely public transport focused with a mix of tour bus, hop-on hop-off and non-stop buses designed to support a more immersive visitor experience on both the Milford Road and in Milford Sound Piopiotahi. It is envisaged that low or zero carbon buses would be phased in.

The model allows some self-drive visitor parking to be retained at Milford Village (potentially 60% less than current levels) and along the Milford Road corridor. Access to parking at key visitor locations could be booked in advance of arrival to reduce congestion. A booking system would assist in giving domestic visitors more certainty that a car park is available prior to departure. Those staying at accommodation in Milford Sound Piopiotahi or along the corridor would also have the option of private vehicle access (regardless of whether they are local or international visitors). This would be factored into their accommodation charge. Hop on hop off bus and coach access would still be encouraged where possible.

Tangata whenua and recreationists that require private vehicles (such as those with boats, heavy equipment, or hunters) would also be provided access. In the case of recreationists such access is likely to be permitted potentially with a combination of one-off or annual passes. Recreationists undertaking day or multi day walks are also likely to find the model's proposed hop-on hop-off bus service an attractive alternative to leaving a private vehicle unattended at a track head.

This approach, although likely to be challenging for some during the transition phase, represents the best model to encourage greater use of coaches and buses while still retaining flexibility for some domestic visitors and recreationists. The outcome will be safer roads, a much-reduced environmental footprint and more assured access to vehicle parking in key locations.

It is anticipated that the access system will be phased in over time by utilising existing tourism sector coach fleets.

Another key component of the recommended access model is the adoption of an hourly cap on visitor arrivals to Milford Sound Piopiotahi. The cap is designed to relieve congestion and spread visitor numbers more evenly across the day, resulting in improved visitor experience and better utilisation of assets and staff. A cap of 1,000 arrivals per hour is considered to be an optimal level considering economic, experiential, and environmental factors. This level of cap would enable Milford Sound Piopiotahi to accommodate up to 1.6m visitors annually in the long term.

[1] See Shortlisting Section 6 for methodology.

The final critical element in the recommended access model is the imposition of an access fee (entrance fee) on international visitors to Milford Sound Piopiotahi. The purpose of the access fee is to recoup development and operational costs and generate surplus funds that can be invested in conservation initiatives and other local/community projects.

From a tourism and recreational perspective, we believe that smoothing visitor loadings, constraining private vehicles and designing key short stop sites and nodes more efficiently will allow for higher annual visitation while improving the quality of the visitor experience. Imposing an access fee will ensure that international visitors "give back" to the environment and local communities. Establishing and implementing a robust monitoring system will assist in determining appropriate visitation levels.

RECOMMENDATIONS

1. Mixed access model A should be progressed for further detailed business case analysis.
2. An hourly cap on visitor arrivals to Milford Sound Piopiotahi should be adopted to smooth visitor flows.
3. An access fee should be imposed on international visitors to Milford Sound Piopiotahi to help recover development and operational costs and fund conservation projects and other local initiatives.

GOVERNANCE AND MANAGEMENT

The tourism and recreation workstream have reviewed the outcomes of the current governance and management structures and systems and found them to be sub-optimal to achieve the ambitions of the master plan. Governance and management are addressed in detail in the governance and management workstream reports. However, from a pure tourism and recreational lens it is strongly recommended that a more integrated governance and management structure be implemented (at least for the Milford corridor and Milford Sound Piopiotahi, and immediate surrounds).

Although available data indicate visitor satisfaction remains high, this masks the fact that the current system clearly contributes towards a number of sub-optimal infrastructure, service, and regional economic outcomes. Key areas of concern with the current approach are that concessions and leases are not delivering an optimal visitor experience on the ground or maximising wider regional economic benefits.

Coordinated planning together with service and asset delivery remains unnecessarily complicated and time consuming. This is largely because of the concessions and lease processes and the number of proponents involved. These have led to an ad-hoc, "house that jack built" planning and implementation approach on the ground, especially in areas such as Milford village. Many assets have also not been maintained at desirable levels. Fragmentation of concession data also makes it difficult to adequately gauge the holistic impact of concessions on an area.

It is also likely that New Zealanders have been displaced from certain sites as they cater more intensively to the international visitor market. These displaced recreationists and visitors rarely appear in satisfaction data. A more centralised governance and management approach would assist in making sure a better spectrum of opportunities is delivered for all visitor types. This desire is reflected in the master planning report.

RECOMMENDATIONS

1. A single integrated governance entity should be established to streamline management and development decisions associated with Milford Sound Piopiotahi and the Milford Road corridor.
2. The discussions and findings from Workstream Three should be integrated into future governance deliberations.

TE ANAU AND SURROUNDS

It is recommended that Te Anau is supported to become a more dominant visitor hub and the starting point of visitors' Fiordland experience. This will require a number of investments within the town and its surrounding area. The fundamental catalyst for this will be the 'Te Anau Hub' containing the Te Anau experience and transport hubs which should be co-located to maximise critical mass and functionality. The viability of the Te Anau will be dependent on adopting the recommended transport model into Milford Sound Piopiotahi.

Increasing visitors' length of stay within Te Anau will also be dependent on implementing a range of initiatives in and around the town that enable visitors to undertake shorter duration activities on either side of longer visits into Doubtful Sound and Milford Sound Piopiotahi. Recommended initiatives include:

- Redesign the Te Anau waterfront and town centre.
- Create new walking/cycling tracks connecting into Te Anau.
- Develop new family-friendly experiences around Te Anau in such areas as Brod Bay campsite and the Hidden Lakes.
- Exploring walking opportunities to the south of Te Anau.

Increasing the significance of Te Anau as a visitor hub will take time and involve overcoming a series of challenges, such as accommodation provision and seasonality. The town will continue to have marked seasonality patterns as it does not have a winter season visitor offer to the same degree as Queenstown (skiing). However, the economic performance of the town can be improved with coordinated implementation of the initiatives outlined.

The tourism workstream sees the experience and transport hubs as being central core project initiatives. The redesign of the waterfront and town centre, cycling and walking tracks and optimised family experiences (in locations such as Brod Bay and the Hidden Lakes) can be implemented in time with the support of partner entities such as The Department of Conservation, Southland District Council, community organisations and businesses.

RECOMMENDATIONS

a) The Te Anau Hub (containing the Te Anau transport and experience hubs) should be progressed for detailed feasibility assessment.

b) The Milford Opportunities Project should encourage:

   i. The redesign of the Te Anau waterfront and town centre.

   ii. The creation of new walking and cycling tracks connecting into Te Anau.

   iii. The optimisation and development of new family friendly experiences close to Te Anau in areas such as Brod Bay and the Hidden Lakes.

   iv. Exploring opportunities to the south of Te Anau.

THE CORRIDOR

The corridor has the potential to play a more significant role in visitors' experience. Currently most visitors undertake a "race to the boat" in their coaches, campervans, and rental cars. For many the corridor is not an immersive experience and represents nothing more than a short series of photo opportunities at a handful of roadside stops.

Regardless of the interventions recommended, for most visitors the corridor will continue to be a relatively fast experience as they will be entering and exiting the National Park and Milford Sound Milford Sound Piopiotahi in a single day. The adoption of the proposed transportation model and

infrastructure in Te Anau will in time give a far higher proportion of visitors the opportunity to experience more of the corridor (e.g., by entering the park earlier and leaving later). For these visitors, emphasis has been placed on improved short stop site design and interpretation, forming a stronger park entry and greater flexibility through a hop on hop off transport service.

For other visitors and recreationists, the proposed interventions are designed to lift the standing of the corridor as a destination in its own right. Fundamental to this is the provision of a wider spectrum of walking opportunities (and biking opportunities where appropriate). People can undertake these experiences by staying overnight within the Eglinton Valley accommodation nodes (at the improved accommodation nodes such as Cascade Creek or Knobs Flat) or by making day trips from external accommodation locations such as Te Anau Downs or Te Anau itself.

A track between Knobs Flat and Cascade Creek is envisaged to give campers from Knobs Flat walking, running, and cycling (if viable) access to both Cascade Creek and Lake Gunn (and Mistake Creek). In the opposite direction the track is more likely to be used by campers for exercise purposes. Depending on its route the track may also facilitate angling access. From past research we know that campers appreciate easily accessible recreational opportunities adjacent to their camping locations, especially those that link sites.

The Whakatipu Super Track Head Node represents a modern reinstatement of the Whakatipu Trail (a historical series of trails linking Whakatipu Waimāori/Lake Wakatipu with the West Coast). It recognises the symbolic east / west transalpine crossing of Southern Alps and has strong support from mana whenua.

As an iconic ‘new’ node it establishes a recognised upper mid-corridor destination, it both adds value and offers an alternative to Milford Sound Piopiotahi. It provides (and meets the demand for) a full spectrum of walking opportunities from short to multi day walks and will appeal to multiple visitor and recreational types. It facilitates access to key observation points such as Key Summit and links several recognised routes / great walks. The opportunity also exists to explore further experience opportunities in the upper and lower Hollyford Valley.

Importantly the Lake Marian carpark is considered the safest location for vehicle parking, facilities and track integration having withstood several hazard events in the past. The Divide car park and track head can be decommissioned when the Whakatipu Super Track Head Node is established.

Of fundamental importance to the corridor planning has been the acknowledgement of the rights of Mana whenua. Several initiatives have been proposed that enable both unrestrained access and improved cultural opportunities; these include the development of a super track head and associated tracks and facilities that represent a modern reinstatement of the Whakatipu Trail and serve as a living classroom/wānanga for Ngāi Tahu. This initiative recognises ngā ara tawhito trails (historical trails/routes) which are an integral part of Ngāi Tahu culture.

Another consideration has been the importance of ensuring domestic recreationists can retain access to key areas for activities such as kayaking, boating, hunting, and climbing. Recreationists participating in such activities often start them at road and track heads that are shared with general visitors. While these general visitors can access via coach and bus, often recreations cannot because of the nature of their equipment. The needs of these recreationists have been considered and accommodated in the recommended transportation model and in the approach taken to site optimisation. The reduction in the volume of international visitors using rental cars and camper vans should also assist recreationists (it is proposed that international visitors can only use rental vehicles and camper vans if they have pre booked accommodation in the corridor and Milford Sound Piopiotahi itself). Recreationists without heavy equipment are also likely to be attracted by the flexibility of the hop on hop of transport service.

In the same way that a better spectrum of walking opportunities is being proposed, a range of accommodation options is also being recommended. In addition to retaining the existing smaller camp sites along the corridor three key accommodation nodes are being indicated. Two, Knobs Creek and Cascades Creek, involve the optimisation of existing sites while one, the Mistake Creek tramping hut, is new.

Mistake Creek is designed to accommodate walkers undertaking a new multi day walk which compliments the longer and shorter walks already on offer in and adjacent to the corridor. This experience is designed as a steppingstone for the longer walking experiences. The hut is envisaged to accommodate up to a maximum of eighty walkers when fully developed (although it would likely be staged subject to a detailed feasibility assessment). The walk would begin and end at the Cascade Creek campsite.

The optimisation of Cascade Creek is very much a tread lightly initiative given the site's challenges with flooding and open position. The area is already heavily modified and most development is envisaged to involve improved landscaping to accommodate tenting and camper van sites. Infrastructure development (such as buildings) would involve basic structures only. The outcome should be a site that looks less rather than more hardened.

Unlike Cascade Creek, Knobs Flat is envisaged to involve the development of more built infrastructure in the forms of cabins, amenity buildings and interpretive structures. Subject to feasibility it may also accommodate a small lodge offering accommodation. This site could also offer camping and camper van accommodation. The site is already heavily modified and sheltered by vegetation.

RECOMMENDATIONS:

1. A strong park entry threshold should be formed as close to the park entry as possible.
2. The Knobs Flat accommodation and interpretive node should be advanced for detailed feasibility assessment and concept design.
3. The Cascade Creek accommodation node should be advanced to the detailed concept design stage.
4. The Whakatipu Super Track Head Node at the Lake Marian carpark and its associated track sections should be advanced to feasibility and concept design stage. Consideration should be given to upper and lower Hollyford Valley experience opportunities.
5. Short stop sites along the corridor should be advanced to detailed concept design stage.
6. The Mistake Creek walking track, and hut concept should undergo a detailed feasibility analysis.
7. Connecting tracks between and from key nodes such as the Lake Marian car park - Key Summit, and Cascade Creek and Knobs Flat should advance to feasibility assessment.
8. The Homer tunnel western portal observation point and eastern portal barrier viewing area should undergo a detailed technical feasibility assessment.
9. A detailed interpretive plan should be undertaken once the master plan has been adopted.

MILFORD SOUND PIOPIOTAHI

Milford Sound Piopiotahi can best be described as piecemeal in both design and appearance. Visually it appears to lack any coordinated planning or standardised quality. Developments that have been undertaken tend to be in response to a particular need and not integrated as part of a larger master plan. The built framework of the site was set many decades ago when visitation patterns and visitor profiles were vastly different. The area is clearly sub-optimal by today's standards. The reasons for this are many and varied but include planning and concessions frameworks and fragmented governance and management systems. It has also, to some extent, been a victim of its own success.

Although visitor data indicate high satisfaction levels from overall visits, this is occurring despite the site's poor-built design and appearance. The natural beauty of Milford Sound Piopiotahi in the eyes of many is so high that they are prepared to overlook the built deficiencies. However, these data do not capture visitors and recreationists who have been displaced from the area or do not visit because it does not offer the experiences or quality of experience that they seek.

The site also receives visitation in a pronounced peak during the day (late morning - early afternoon). This is largely due to the travel time from Queenstown which results in large number of visitors arriving at the same time rather than being spread out across the day. These time limitations mean that for most visitors their Milford Sound Piopiotahi experience is almost entirely comprised of a boat trip before needing to leave quickly to meet itinerary and driver hour[2] constraints.

It is strongly recommended that the wider Milford Sound Piopiotahi village precinct[3] be redeveloped to be more cohesive to meet modern planning and design practices. This will assist in the delivery of better conservation, visitor experience and financial outcomes for Southland and the lower South Island. This should be undertaken in conjunction with the recommended governance and management, transportation model, Te Anau, and Corridor recommendations outlined in the master plan report.

An objective of the redesign of the area is to make it more than just a location to take a boat ride. The recommended initiatives bring about substantive change to the way visitors experience the area. A centralised visitor transport and experience hub is located in the safest part of the foreshore area and serves as a compass directing visitors to the types of experiences they desire. These can include the world-famous boat tours, walking a network of new short walks (some reaching raised viewing areas), or undertaking more passive activities such as taking in scenic views from new on grade, accessible observation points in and around the visitor hub.

The proposed site layout is no longer divided in two by a runway which is removed in favour of a new heliport, walking tracks, access ways, observation areas and revegetation initiatives. Removal of the runway allows for spatial optimisation of Milford Sound Piopiotahi, improves the visitor experience, reduces environmental impacts, and avoids costly runway improvements, while having only a minor impact on visitation.

Visitor safety is improved by centralising buildings into safer areas, installing refuges in low lying coastal zones near areas of visitor activity, separating visitors from commercial and recreational boating activity (into designated viewing areas) and reducing dwell times in danger zones (such as rockfall areas). The safety of residents is also optimised with a new staff accommodation building in a safer zone.

RECOMMENDATIONS:

a) The fixed wing aircraft runway should be removed in time from Milford Sound Piopiotahi and a rotary heliport retained. Detailed feasibility analysis should be undertaken on the heliport.

b) The proposed centralised transport/visitor hub and interpretive marine centre should be advanced for detailed feasibility analysis. Subject to the findings of this analysis the existing boat terminal should be replaced with a gateway facility.

c) The proposed walking tracks, observation points[4] and reorganisation of the commercial port area should be advanced to detailed concept design and feasibility.

d) A detailed interpretive plan should be undertaken once the master plan has been adopted.

e) Visitor accommodation should be advanced for detailed feasibility assessment.

f) Resident accommodation should be consolidated centrally (co-located with the visitor hub). The facility should be advanced to the feasibility study stage.

g) The policies surrounding cruise ship access to Milford Sound Piopiotahi should be reviewed.

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[2] By law coach drivers are required to adhere to a maximum number of driver hours and rest breaks in any given workday.

[3] Note: The Milford Sound Piopiotahi village precinct incorporates both Milford village (at Freshwater Basin) and Cleddau Village (staff accommodation at Deepwater Basin).

[4] 1.. In time “the top falls link” to Bowen falls should also undergo detailed feasibility investigation (possibly after simpler observation opportunities for Bowen Falls have been explored and if viable implemented).

COST-BENEFIT ANALYSIS

A cost-benefit analysis (CBA) was undertaken to provide an initial understanding of the expected economic costs and benefits of the preferred master planning option for Milford Sound Piopiotahi. It was necessarily high-level due to the breadth and conceptual nature of the master planning process and is intended to be indicative only. Further economic evaluation and business casing will be required as the master plan concepts are refined and specified in greater levels of detail.

The results of the CBA are strongly influenced by the level of access fee imposed on international visitors. The net benefit of the preferred master option ranges between $103 million with no access price and $636 million with an access price of $100 at the subregional level, and between -$168 million with no access price and $98 million with an access price of $100 at the national level.

These outcomes produce benefit-cost ratios (incremental benefits divided by incremental costs) of between 1.25 (no access price) and 2.52 ($100 access price) at the subregional level, and between 0.60 (no access price) and 1.23 ($100 access price) at the national level.

These results indicate that implementation of the preferred master plan option would be beneficial for the Milford Sound Piopiotahi subregion under all access pricing scenarios, and beneficial for New Zealand with an access price of between $50 and $200.

CONCLUSION

Milford Sound Piopiotahi has for a long time not delivered on its full potential for Mana whenua, the people of Southland, New Zealanders, or visitors. The piecemeal approach to planning over many decades, hampered by governance, management, and system constraints, has led to sub-optimal outcomes across many areas.

The Milford Opportunities Project has recommended significant change across multiple work streams. Many of the recommended changes will be a significant departure from business as usual and will be met with scepticism from certain operators, stakeholders, and sectors of the public.

None-the-less change is required as busines as usual will not deliver the desired conservation, social or economic outcomes. The disruption caused by Covid-19 represents a significant opportunity to bring about a long overdue reset of the way in which Milford Sound Piopiotahi is governed, planned, redeveloped, and managed.

1 PROJECT BACKGROUND AND PURPOSE

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

Visitor 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 The MOP stage 2 approach was impacted significantly by the 2020 Fiordland floods and then the COVID-19 pandemic. Regionally these events decimated the flow of both domestic and international visitors from February 2020 on. Although domestic tourism began to flow again after the national lockdowns ended it was generally below historic levels. International tourism has still not returned in January 2021.

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.

WORKSTREAM OBJECTIVES

1.7 The above objectives have been summarised and applied to the Tourism workstreams as follows:

#	Stage two objective	Application to tourism work streams
1	**Ngāi Tahu's role as mana whenua and Treaty partner is acknowledged and Te ao Māori values are embedded throughout.**	How can Ngāi Tahu harness and shape tourism and the visitor experience?
2	**Milford Sound Piopiotahi is protected and conserved as required by its World Heritage status.**	How can we use tourism to improve conservation outcomes for FNP?
3	**The visitor experience is world class and enhances conservation of natural and cultural heitage values and community.**	How do we create a truly unique and compelling visitor experience that is world leading?
4	**Infrastructure is effective, efficient, resilient, and sustainable (including access methods).**	How do we overcome the capacity and congestion issues currently observed in Milford Sound and on the Milford Road?
5	**Visitors benefit communities, including Ngāi Tahu, communities of Te Anau, Southland, and Otago.**	"How do we generate greater economic and social prosperity for host communities? How do we extend the benefits further into Southland? How can we achieve the level of planning, coordination and management required to make this happen? How do we sequence our interventions to establish and maintain momentum?"

SCOPE OF WORK

1.8 The original scope of work as per the project RFP is outlined below in relation to the four Tourism workstreams.

SCOPE OF WORK: UNDERSTANDING THE COMMERCIAL OPERATORS AND RECREATIONAL USERS

1.9 The key outcomes of this project are to –

1.9.1 Produce a report that:

- Identifies the market structure/characteristics of the market - e.g., quantity vs quality,
- Identifies the supply and demand influencers – e.g., time requirements and therefore transport, accommodation and experience options.
- Identifies the key changes that would have the most impact (positively or negatively on the tourism operator/customers).
- Identifies the key issues experienced by the recreational users of Milford and the corridor, including but not limited to the great walks/day walks and recreational fishers, and the types of outcomes they would like to see.

- Includes a specific analysis of the likely effects of the 'strategic options' included in the Master Plan on commercial operators and recreational users.

1.9.2 Contribute information to the Master Plan that enables the identification and development of strategic options.

SCOPE OF WORK: CUSTOMER JOURNEY MAPPING AND TYPOLOGIES

1.10 The key outcomes of this project are to –

1.10.1 Produce a report that:

- Identifies the different types of visitors to Piopiotahi
- Identifies key issues for the different types of visitors including but not limited to how and why people plan their journey, how they access information, how they are influenced, what could/would improve their journey
- Includes an analysis of the likely reaction of different visitor types to different options considered as part of developing the Master Plan and specifically the 'strategic options'.

1.10.2 Contribute information to the Master Plan that enables the identification and development of strategic options.

SCOPE OF WORK: TOURISM ECONOMIC IMPACT STUDY

1.11 The key outcomes of this project are to –

1.11.1 Produce a report that includes:

- A baseline assessment of the current economic value and costs of Milford Sound Piopiotahi as a tourism destination to Milford Sound Piopiotahi itself, the Te Anau Basin, Southland, the South Island and New Zealand shown on an activity basis.
- Identification of the effects of variable pricing options on generating value, what that likely value is, and the likely impact on visitors and operators.
- Scenario testing of, including sensitivity analysis, particularly of the 'short list' and 'strategic' options that are identified for the Milford Opportunities Project Master Plan using the baseline information above to assess the likely economic impacts.

Examples of the type of tasks to be considered are:

- Analysis of the potential costs and benefits of extracting or relocating non-essential infrastructure and analysis of alternative options.
- Assessment of lease and concession arrangements and associated rights of renewal and the implications for new development and master planning.
- A high level estimate of the benefits and costs of potential options.
- A high level estimate of the capex and opex of potential options.

1.11.2 Contribute information to the Master Plan that enables the identification and development of strategic options.

SCOPE OF WORK: VISITOR MONITORING PROGRAMME

1.12 The key outcome of this project is to produce a visitor monitoring programme that:

- Establishes the framework and develops the metrics for a comprehensive baseline data set.

- Integrates a range of information such as conservation, visitor information, infrastructure, hazard, and economic data in one report.
- Establishes a legacy project for multi-agency on-going monitoring for measuring the outcomes of planned initiatives – this includes developing an agency agreement that makes the collection and reporting of the data sustainable in the long term.
- Identifies the owner/funder of this monitoring programme.

1.13 An initial visitor monitoring plan is provided as Appendix 1.

CONNECTION TO PILLARS

1.14 The Tourism workstreams deliver on the pillars in the following ways:

- **Mana Whenua values woven through:** This pillar is advanced by acknowledging mana whenua's role as kaitiaki and providing a platform for an authentic expression of mana whenua narratives; reducing environmental impacts in accordance with mana whenua desires; providing opportunities for employment and delivering a quality of visitor experience aligned to manaaki principles. Acknowledging Te Tiriti o Waitangi by guaranteeing mana whenua access to their taonga.
- **A moving experience:** Visitors are able to immerse themselves more fully in the grandeur of the natural environment with the assistance of high-quality infrastructure and services. The journey is of equal importance as the destination with a less hurried, transport and access model.
- **Tourism funds conservation and community:** The project team recommends that an access fee is levied on all international visitors for entry into Milford Sound Piopiotahi, with continued free access for New Zealanders. The international visitor fee will provide a revenue stream that can be used to cover the cost of visitor infrastructure and help fund local conservation and community initiatives.
- **Effective visitor management:** Visitor numbers will be proactively managed to reduce congestion in Milford Sound Piopiotahi and spread demand more evenly across the day. This will improve the visitor experience and enable ongoing, sustainable growth in tourism with economic benefits for local communities.
- **Resilient to change and risk:** A redesigned Milford Village will concentrate people and infrastructure in the safest possible locations and provide more resilient buildings and shelters.
- **Conservation:** International visitor fee revenue can be re-invested back into conservation to restore and enhance the natural ecological values of the area. Visitor infrastructure is designed in a way that is sympathetic to the environment and located in already-modified areas.
- **Harness Innovation and Technology** This is enabled through a staged transition to an electric bus fleet, interpretive approaches, leveraging the Milford Fibre Project to deliver real-time information to visitors at key nodes and through on-line tools to manage access to the corridor and Milford Sound Piopiotahi.

2 BASELINE: CURRENT STATE

2.1 This section presents the data and information that have been collected and analysed to inform the tourism-related components of the study and develop understandings regarding tourism demand and supply in Milford Sound Piopiotahi.

VISITOR NUMBERS

VISITATION TO MILFORD SOUND HAS GROWN SIGNIFICANTLY IN RECENT YEARS

2.2 There were approximately 870,000 visitors (excluding cruise ship passengers) to Milford Sound in the 2019 calendar year (Figure 1).

2.3 The number of people visiting Milford Sound has grown by 69% over the last 13 years, or 4.1% per annum. Almost all this growth has occurred in the last five years[5].

2.4 83% of visitors to Milford Sound are from overseas and 17% are from New Zealand.

2.5 There were an additional 222,000 international cruise liner passengers on 140 ship visits in the year ending June 2019 that are not included in the chart below.

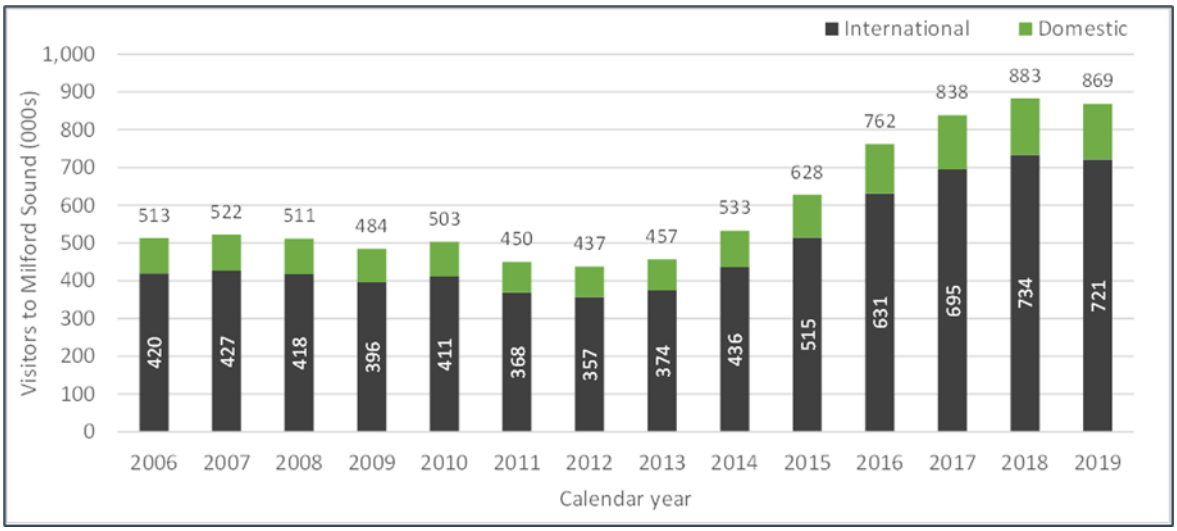

Figure 1: Visitor no's to Milford by year
(Milford Sound Tourism, Qrious, Fresh Info)

MILFORD SOUND DEMAND WILL CONTINUE TO GROW OVER THE NEXT 30 YEARS AND BEYOND

2.6 Annual growth in international visitors to Milford Sound is highly correlated with international holiday arrivals to New Zealand. This is because most visitors to Milford Sound are in New Zealand for a holiday (Figure 2).

[5] Refer Strategic Direction for the Review of the Regional Coastal Plan for Southland, Feb 2019, p.10 (data sourced from Harbourmaster).

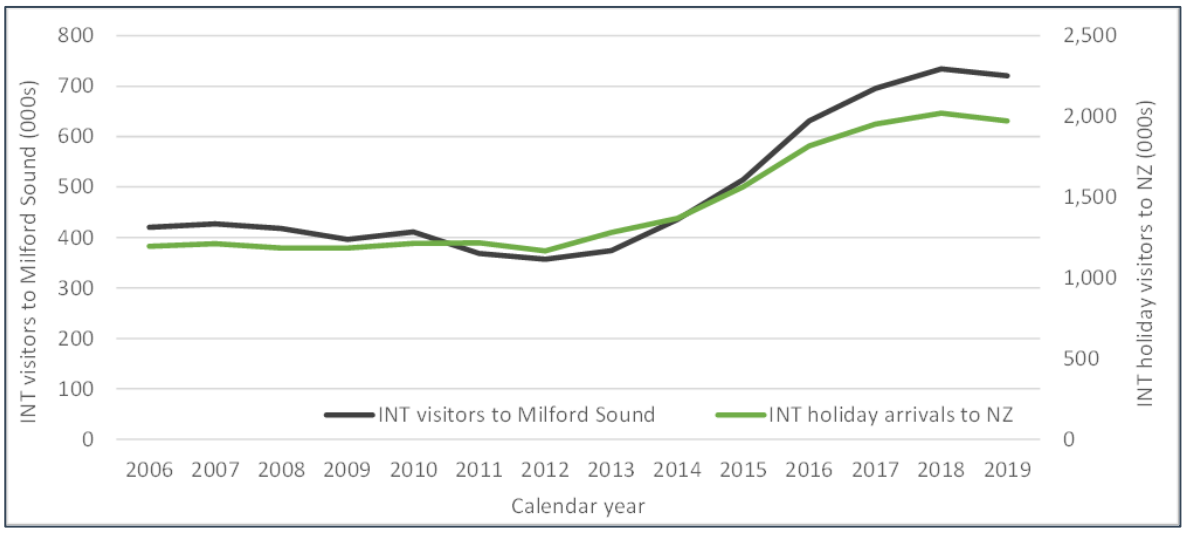

Figure 2: Int. visitors to Milford vs holiday visitors to NZ
(Milford Sound Tourism, Stats NZ)

2.7 This relationship allows us to estimate future growth in visitor demand for Milford Sound (without intervention) based on expected growth in holiday visitation to NZ. "Organic" growth would see demand for Milford Sound increasing by 70% over the next 30 years (Figure 3).

2.8 Actual growth could be much higher or lower than this, depending on the decisions made as a result of this project. Demand can be stimulated or regulated with careful management.

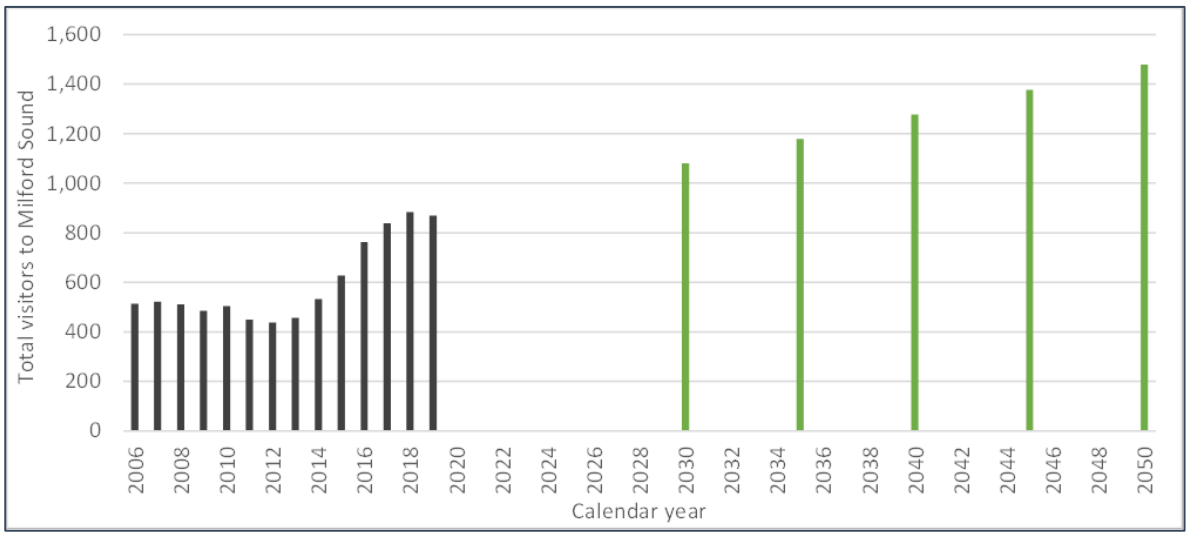

Figure 3: Actual and projected visitors to Milford
(Milford Sound Tourism, Stats NZ, Fresh Info)

FIORDLAND VISITED BY MORE INTERNATIONAL VISITORS THAN ANY OTHER NZ ATTRACTION

2.9 According to the International Visitor Survey, more international visitors to New Zealand go to Fiordland (predominantly Milford Sound) than to any other attraction covered by the survey (Figure 4).

2.10 This demonstrates Fiordland and Milford's importance as pre-eminent New Zealand visitor icons, and the marketing reach overseas of Milford in particular.

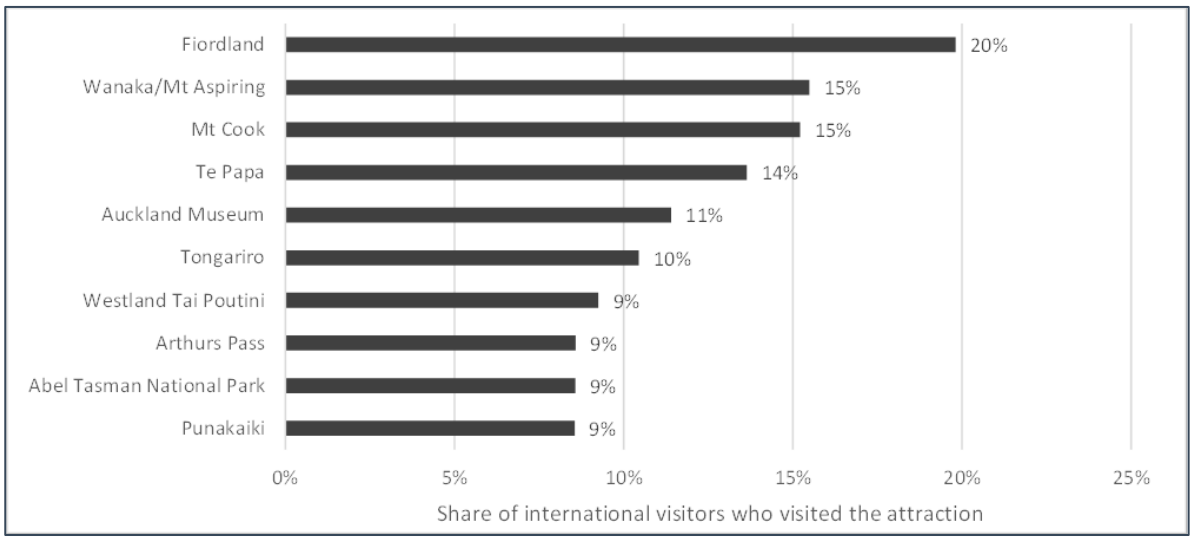

Figure 4: Share of Int. visitors to named attractions (International Visitor Survey)

TEMPORAL SPREAD OF VISITORS

VISITATION TO MILFORD SOUND IS HIGHLY SEASONAL

2.11 Visitation to Milford Sound is highly seasonal, with 62% of visitors arriving in the 5 months between November-March and 27% of visitors arriving in the 2 busiest months, January and February (Figure 5).

2.12 Average daily visitor numbers in February 2019 exceeded the 4,000 daily visitor cap set by the Department of Conservation in the Fiordland National Park Management Plan.

2.13 The strong seasonality creates infrastructure pressures in peak months and leaves operators with relatively low income during the rest of the year. These conditions are likely to be deterrents to new investment.

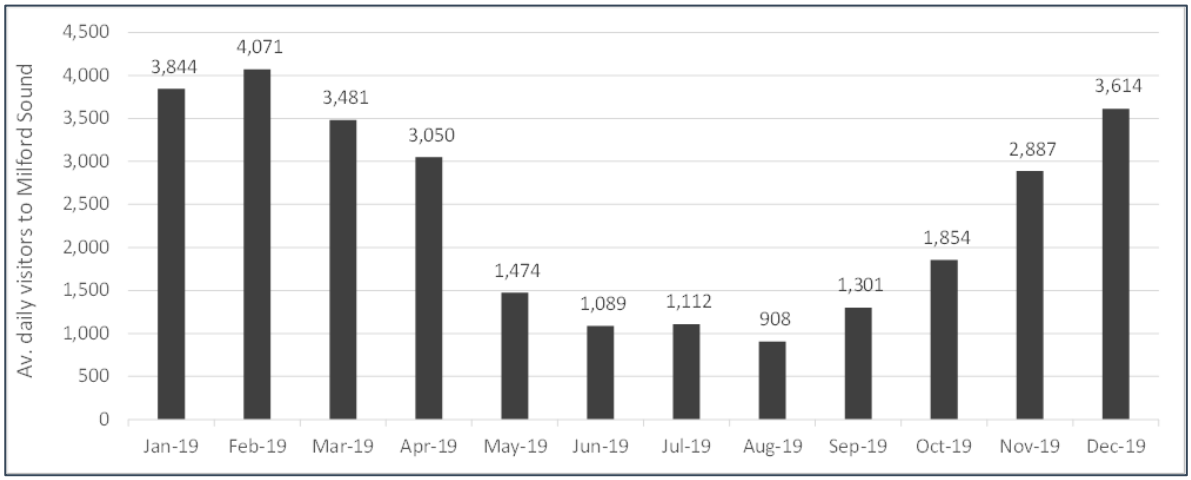

Figure 5: Av. daily visitors to Milford/month (Milford Sound Tourism)

"TIDAL" VISITOR FLOWS CREATE CONGESTION ISSUES ON SH94 AND AT MILFORD SOUND

2.14 The "cul-de-sac" nature of SH94, combined with the lack of accommodation in Milford Sound, means that almost all visitors enter and exit Milford Sound on the same day. This creates a "tidal" flow of visitors (Figures.6 and 7).

2.15 The inbound flow peaks between 8am and 1pm, and the outbound flow begins at around midday. The relationship between outbound flows and sailing schedules is evident in the sawtooth pattern in the graph below.

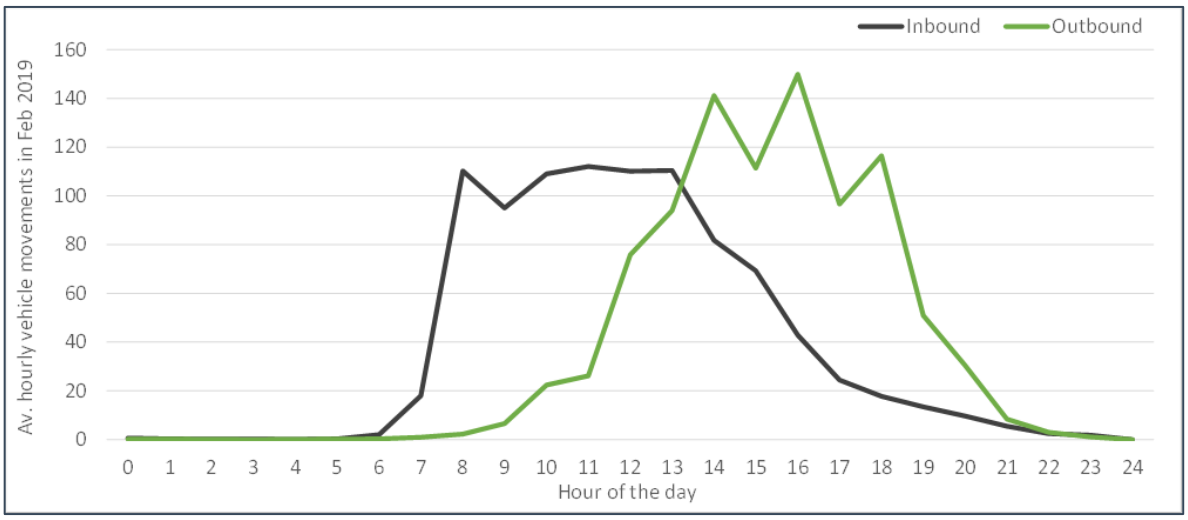

Figure 6: Av. hourly vehicle to/from Milford, Feb 2019
(NZTA telemetry data for the Homer Tunnel)

2.16 The tidal pattern of visitation causes significant congestion at the Homer Tunnel in the late morning/early afternoon period when the two flows meet (Figure 7).

2.17 It also creates congestion in Milford Sound itself between ~11am-3pm, with the average number of vehicles at Milford Sound peaking at around 450 at 1pm. The number of vehicles present in Milford Sound peaked on 28 December 2019 at over 650.

2.18 The high concentration of visitors in the middle of the day creates issues with parking availability and overcrowding which are detracting from the visitor experience.

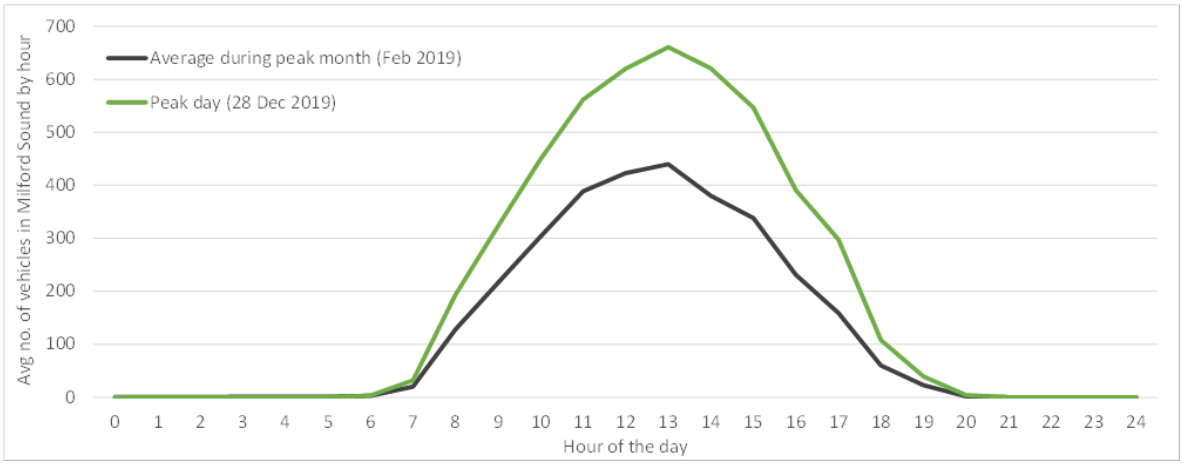

Figure 7: Av. no. vehicles in Milford/hour, Feb 2019
(NZTA telemetry data for the Homer Tunnel)

TRAVEL PATTERNS

2.19 Around 95% of visitors to Milford Sound access it by road (Figure 8), representing 828,300 in calendar year 2019.

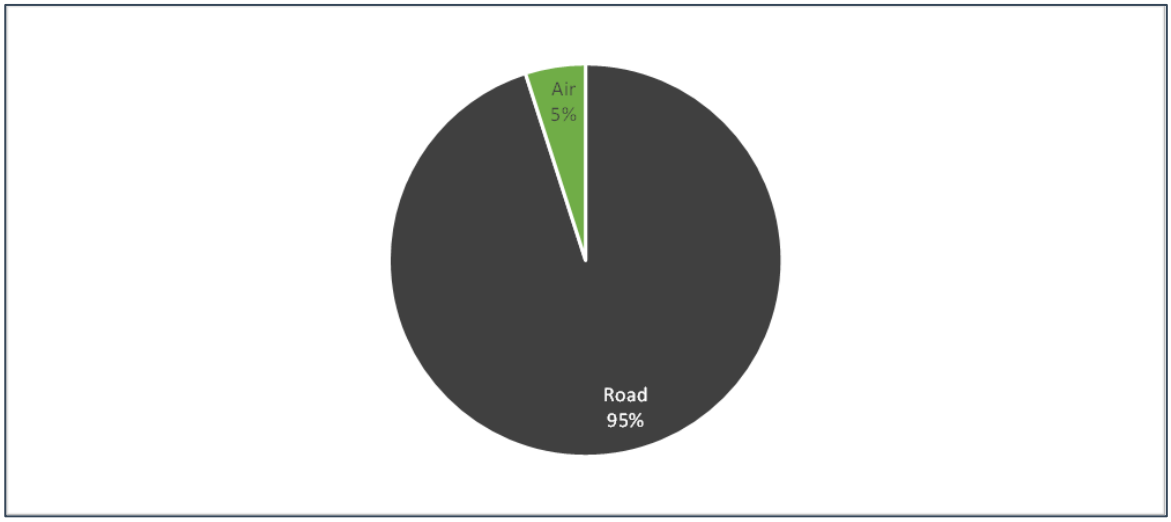

Figure 8: Mode of transport used to access Milford
(Milford Road Alliance, Ministry of Transport, Fresh Info)

2.20 There were 193,500 inbound vehicle movements in 2019, of which 91% were private vehicles (cars and campervans). Buses (tour coaches and mini buses) carried 50% of passengers while only accounting for 9% of vehicle movements (Table 1).

2.21 Buses carried an average of 26.1 passengers per vehicle compared with 2.8 for cars and 2.2 for campervans.

Table 1: Monthly vehicle counts, mode split and average occupancy, December 2016[6]

Mode	Number of vehicles	% of vehicles	Number of people	People per vehicle	% of people
Car	633	79%	1,791	2.8	45%
Campervan	92	12%	198	2.2	5%
Coach + minibus	78	9%	2,038	26.1	50%

(Milford Sound Tourism, Waka Kotahi)

2.22 Inbound vehicle movements averaged 938 per day in Feb 2019, compared with only 179 in August 2019 (Figure 9).

[6] Mode splits and numbers calculated from surveys carried out by TDG for Milford Sound Tourism in December 2016 and Waka Kotahi telemetry data at the Homer Tunnel. Some assumptions were made as the light vehicle survey was incomplete so light vehicle numbers were scaled up in line with what was observed in the telemetry data.

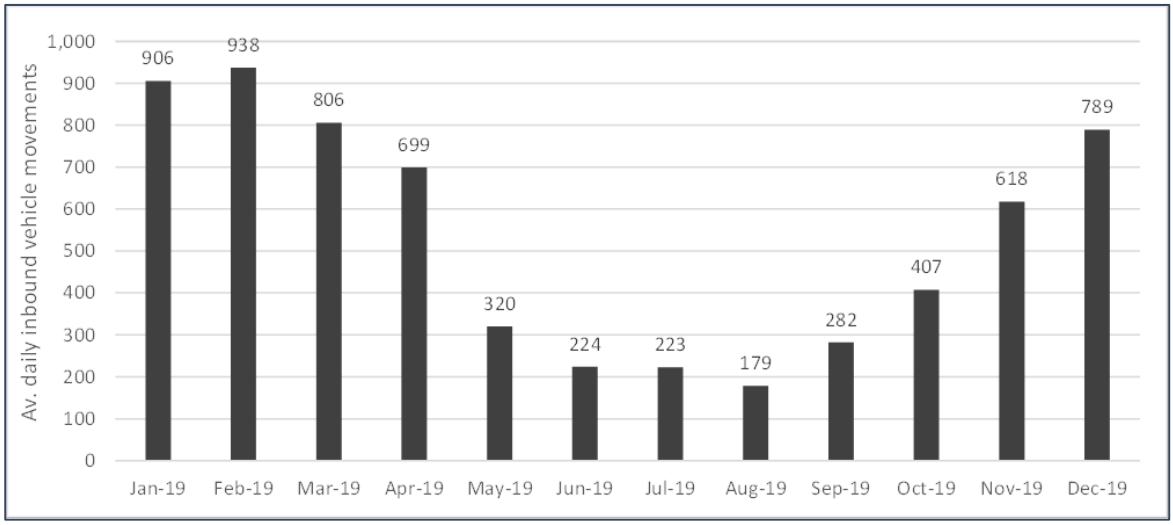

Figure 9: Av. daily inbound vehicles at Homer Tunnel
(Ministry of Transport, Fresh Info)

2.23 The relationship between visitor numbers and inbound vehicle movements is very stable across the year, suggesting that the ratio of private vehicles to buses (which is the main determinant of average vehicle occupancy) is similar in all seasons (Figure 10).

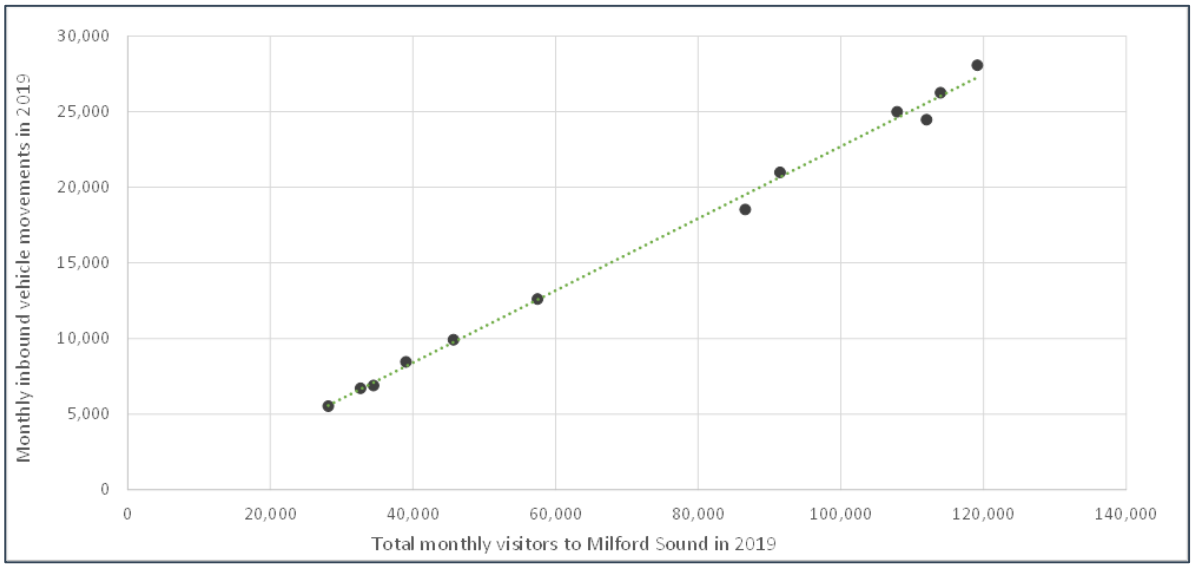

Figure 10: Monthly inbound vehicles vs visitors
(Milford Sound Tourism, NZTA telemetry data)

THERE WERE AROUND 61,000 SEATS AVAILABLE ON FLIGHTS INTO MILFORD (MFN) IN 2019

2.24 The number of passenger seats available on flights into Milford Sound Airport has remained constant at around 61,000 in the past two years. The spike in 2017 appears to be an anomaly, at least in part caused by the concurrent operation of soon-to-be-retired aircraft and new aircraft for a few months (Figure 11).

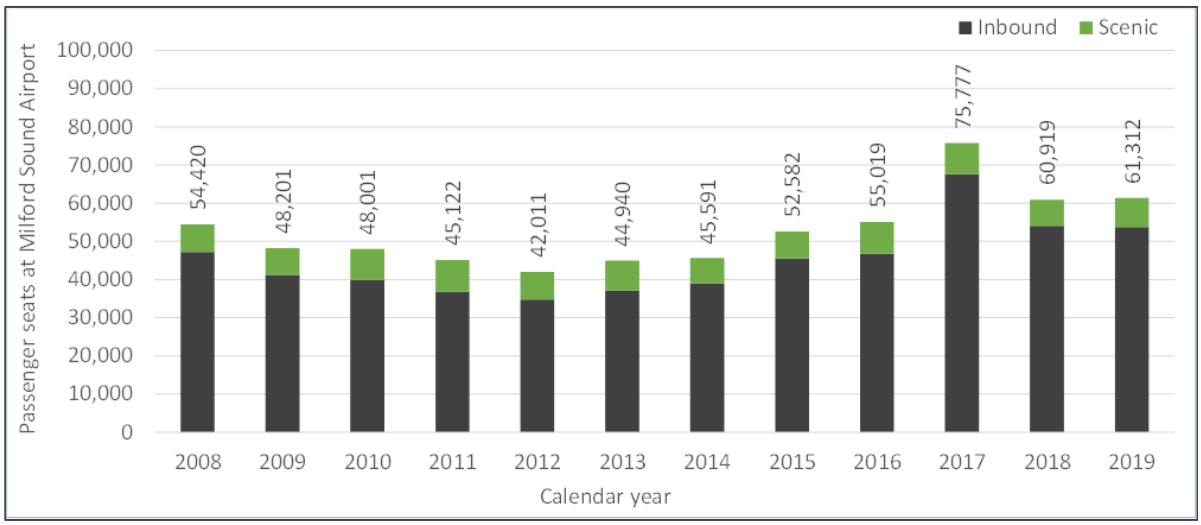

Figure 11: Annual passenger seats into MFN 2008-2019
(Ministry of Transport, Fresh Info)

2.25 Around 88% of MFN's traffic is made up of flights to and from other locations (mostly Queenstown) and the remaining 12% is scenic flights that take off and land in Milford Sound.

2.26 Around two thirds of seat capacity is in fixed wing aircraft and the remaining one third is in helicopters (Tables 22, 23).[7]

2.27 Passenger movements are not recorded at MFN, but we expect the seat utilisation rate to be in the order of 75%.[8]

Table 2: No. of passenger seats at MFN, 2019

	Fixed wing	Helicopter	TOTAL
Inbound	40,132	13,661	53,793
Scenic	464	7,055	7,519
TOTAL	40,596	20,716	61,312

(Ministry of Transport)

Table 3: Shares of passenger seats at MFN, 2019

	Fixed wing	Helicopter	TOTAL
Inbound	65%	22%	88%
Scenic	1%	12%	12%
TOTAL	66%	34%	100%

(Ministry of Transport)

2.28 At an annual level, average daily landings at Milford Sound Airport have remained relatively consistent over time, with some elevation in 2015-16 and a temporary spike in 2017 which we understand to have been at least partly due to the concurrent operation of soon-to-be-retired aircraft and new aircraft for a few months (Figure 12).

[7] A presentation provided by the Queenstown Milford Users Group (QMUG) in October 2020 indicates that passenger capacity is split circa 75% / 25% in favour of fixed wing over rotary. We are unable to verify this split because the Ministry of Transport only records the number of aircraft movements in its data, not the reason for those movements or the number of passengers carried. On a seat-count basis we estimate that around 66% of aircraft seats at Milford Sound airport are on fixed wing aircraft, which broadly concords with the proportions presented by QMUG.

[8] We do not have access to data on air passenger volumes. We have assumed an average utilisation factor of 75% across all aircraft.

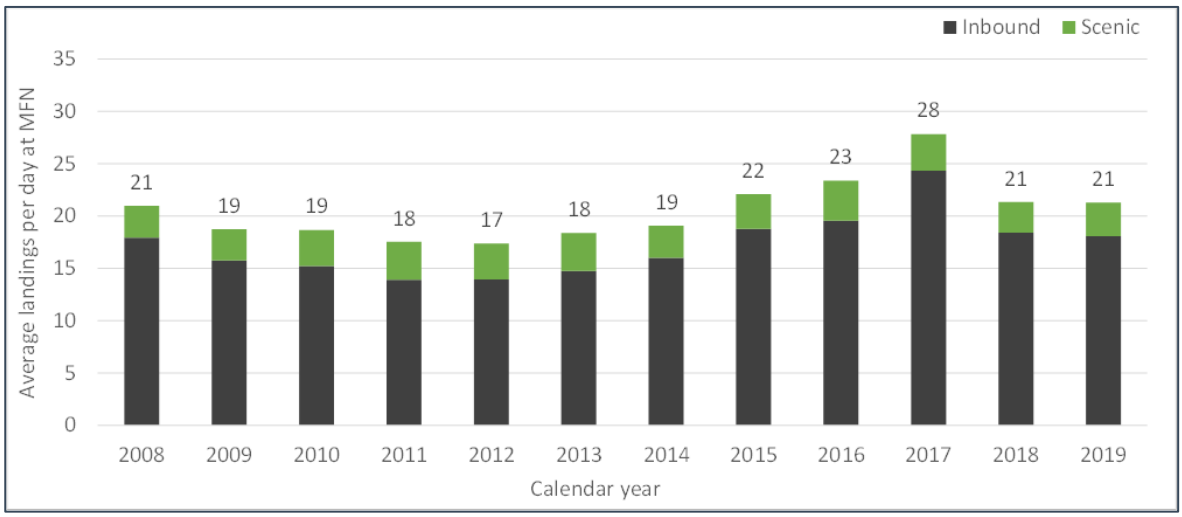

Figure 12: Av. daily landings at MFN by year
(Ministry of Transport)

2.29 Average daily landings at Milford Sound Airport are highly seasonal, with less than 10 landings per day during low demand periods and more than 40 landings per day during peak demand periods (Figure 13).

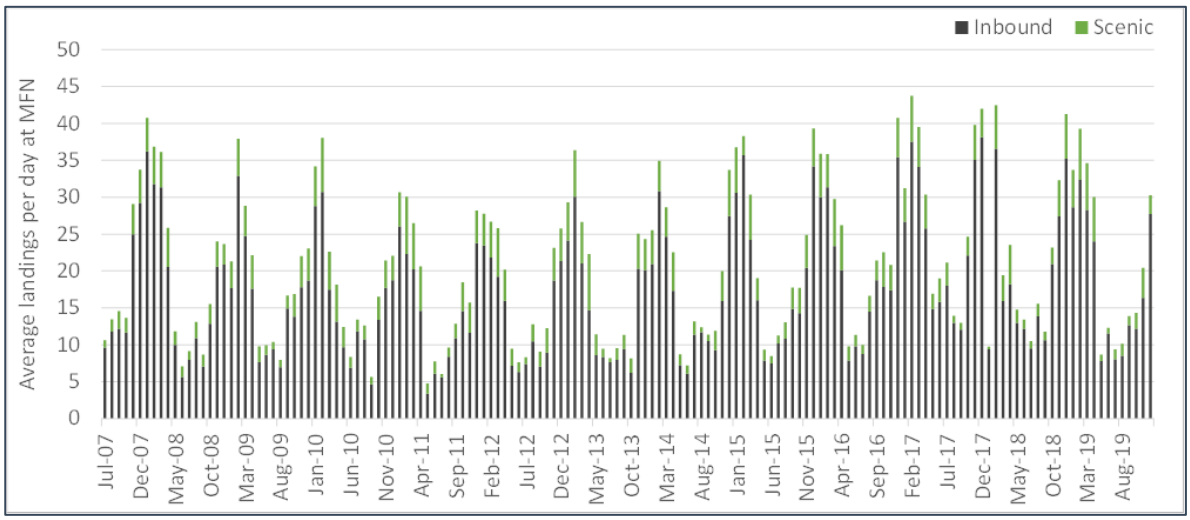

Figure 13: Av. daily landings at MFN/month 2007-2019
(Ministry of Transport)

2.30 In 2019 the number of landings per day peaked in February at 39 (or 78 aircraft movements per day including take-offs and landings) and was lowest in May at 9 (18 movements), (Figure 14).

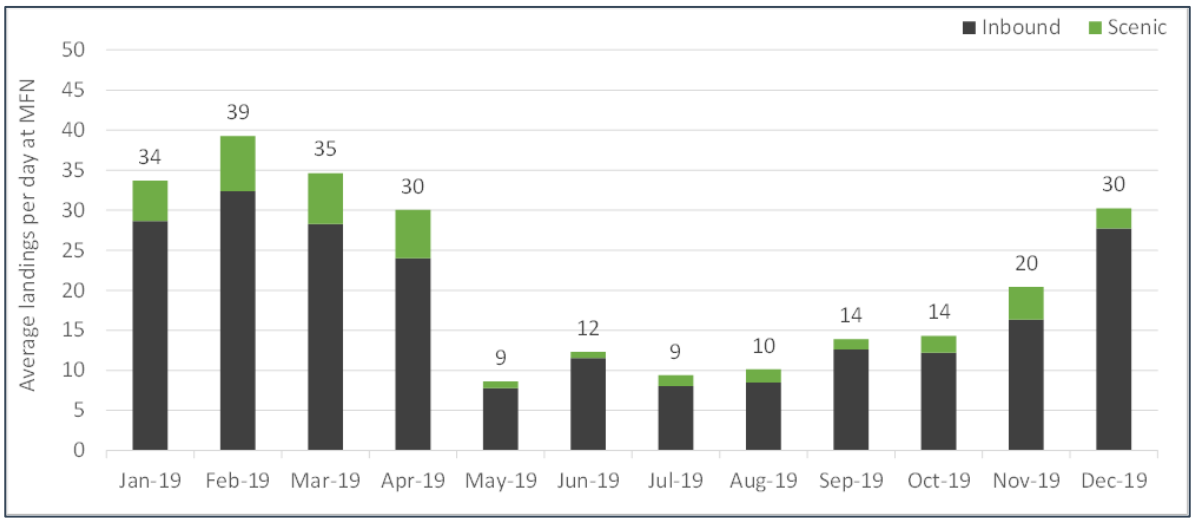

Figure 14: Av. daily landings at MFN/month in 2019
(Ministry of Transport)

A HIGH PERCENTAGE OF INTERNATIONAL VISITORS TO MILFORD SOUND ARE DAY-TRIPPING FROM QUEENSTOWN

2.31 Around 55% of international visitors to Milford Sound stay overnight in the local area (Milford Sound/Milford corridor/Te Anau/Manapouri).[9] The remaining 45% are day visitors from further afield, predominantly Queenstown (8+ hour drive time both ways plus time spent in Milford), (Figure 15).

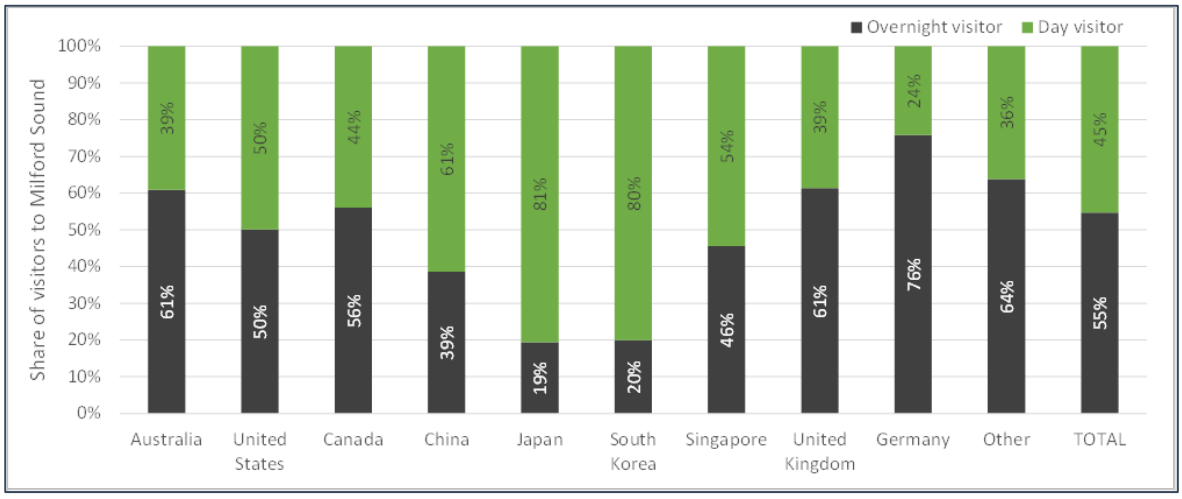

Figure 15: Share of int. visitors to Milford by type
(International Visitor Survey)

2.32 Most visitors to Milford Sound Piopiotahi who stay overnight in the local area stay in Te Anau (79% of visitor nights). A further 17% stay along the Milford corridor, including Milford Sound Piopiotahi itself and only 4% stay in Manapouri.

[9] This statement applies to all international visitors (noy only those traveling by air).

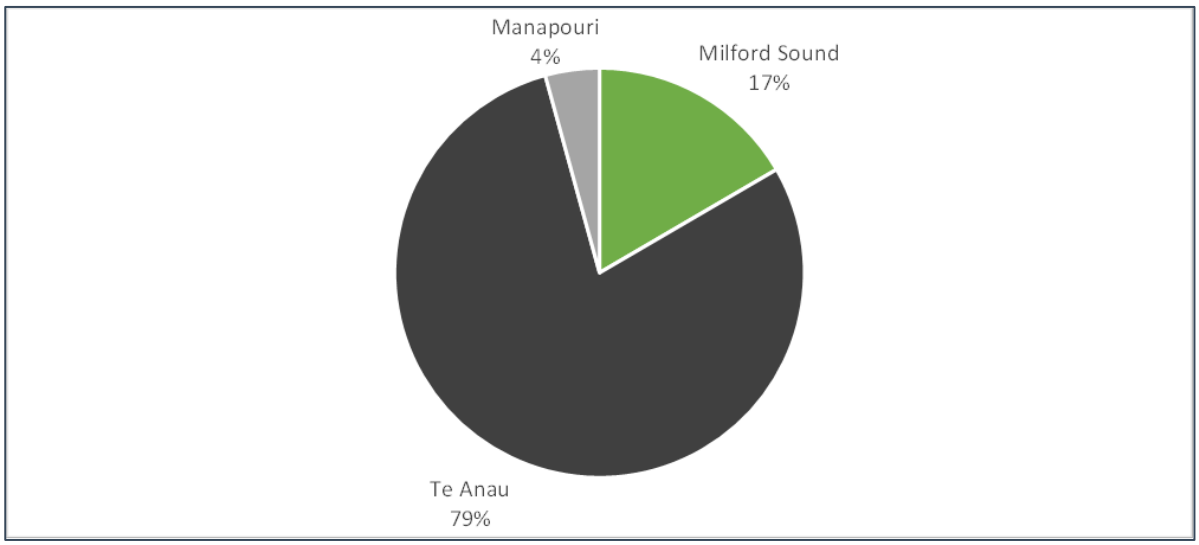

Figure 16: Where int. visitors to Milford stay overnight locally (International Visitor Survey)

2.33 90% of all international overnight visitors to Manapouri, and 83% of all international overnight visitors to Te Anau, also visited Milford Sound Piopiotahi (Figure 17). It is reasonable to assume that a lot of this visitation would not have occurred in the absence of Milford Sound Piopiotahi. 52% of international overnight visitors to Queenstown also visited Milford Sound. Given the breadth of Queenstown's visitor offering, visitation to Queenstown is likely to be much less dependent on Milford Sound than visitation to Manapouri and Te Anau.

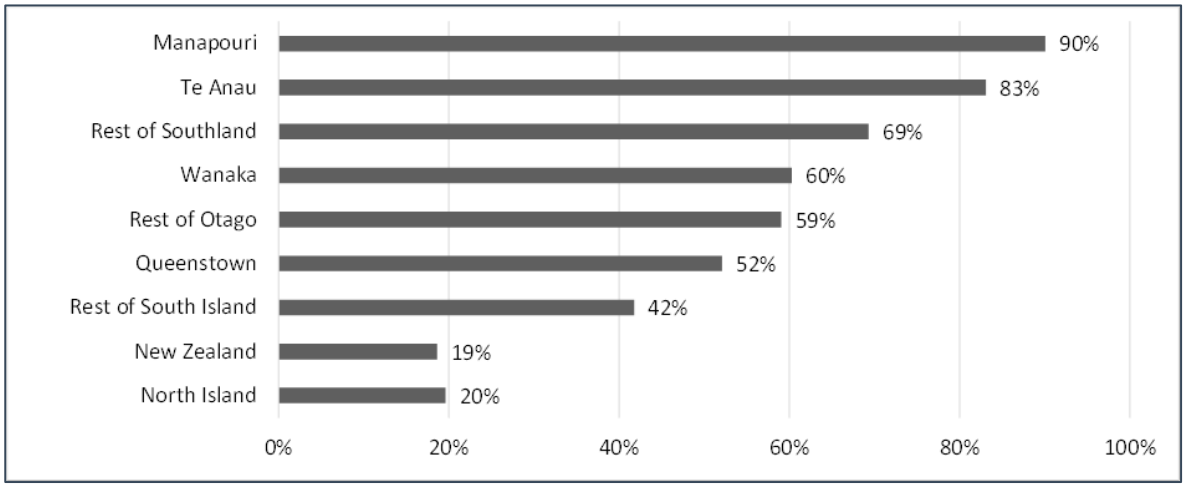

Figure 17: Proportion of int. visitors also visiting Milford, Feb 2019 (International Visitor Survey)

BOAT CRUISE CAPACITY AND UTILISATION

2.34 Summer and winter sailing schedules were sourced from Milford Sound Tourism to estimate the number of boat cruise departures across the day and the maximum number of passengers that could be carried (passenger capacity).

2.35 Figure 18 shows that there was an average of 50 boat cruise departures per day in the 2018/19 summer season (October 2018 – April 2019), compared with 28 per day in the winter season (May – September 2019). The winter departure schedule is relatively uniform between 9am and 2pm at 4-5 cruises per hour, while the summer schedule has more of a sawtooth pattern with a notable peak between 1-2pm.

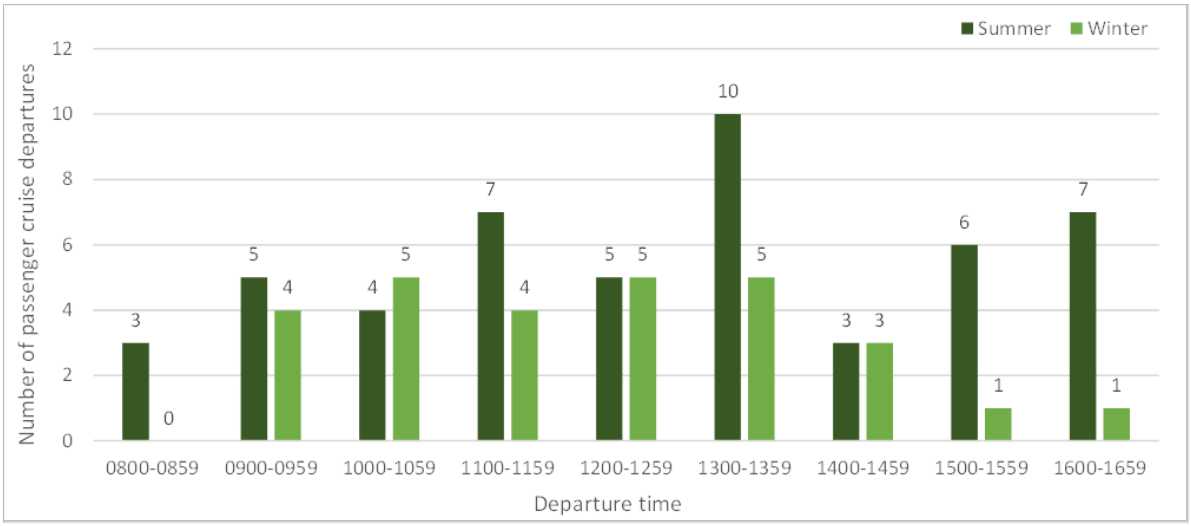

Figure 18: Av. daily boat cruise departures/hr, 2018/19
(Milford Sound Tourism, Fresh Info)

2.36 Figure 19 shows the same departure data as the graph above but is divided into 15-minute increments. The peak hour of 1-2pm has two sub-peaks with 3 boat cruises departing between 1-1:14pm and 5 boat cruises departing between 1:30-1:44pm. A further two boat cruises depart between 1:45-1:59pm.

2.37 The 1-2pm peak appears to be driven largely by the arrival times of buses from Queenstown. Boat operators have responded to this influx of visitors by ensuring that most of their boats are available at this time. That affects the cruise schedule for the rest of the day because each boat operates on a ~2-hour cycle. The 1-2pm peak therefore creates smaller peaks in 2-hour increments either side of the main peak. This effect creates the sawtooth pattern that is evident in the data.

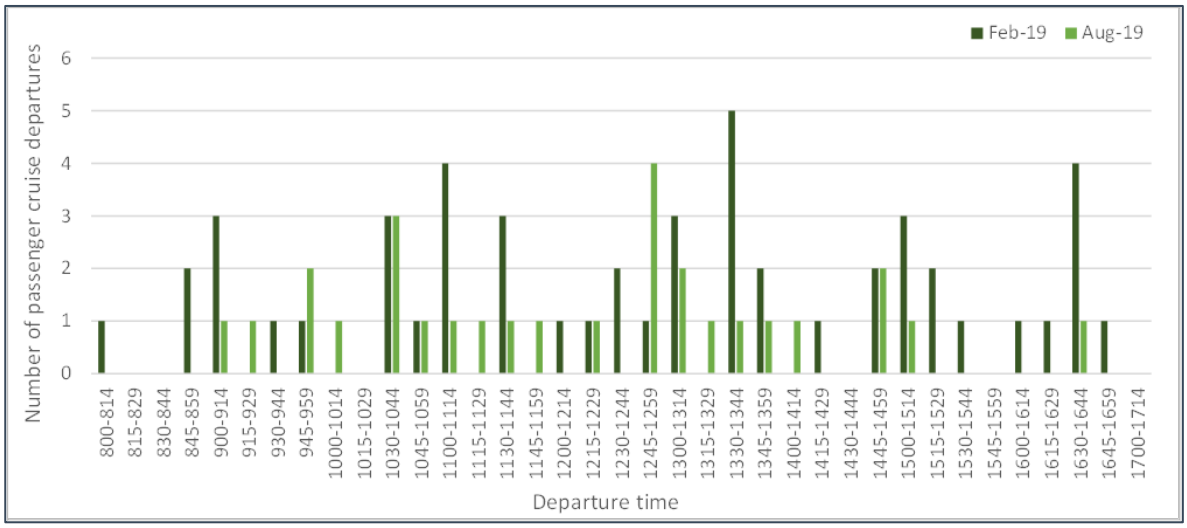

Figure 19: Av. daily boat cruise departures/15mins, 2018/19
(Milford Sound Tourism, Fresh Info)

2.38 Passenger capacity in Figures 20 and 21 is based on the reported “wet weather” capacity provided by Milford Sound Tourism. This represents the maximum carrying capacity of vessels when it is raining i.e., covered capacity. The passenger capacity profile is broadly similar to the departure profile, with any major differences being explained by differences in vessel sizes. The sawtooth pattern observed in the departure data is even more prominent in the passenger capacity data because boat operators deploy their largest vessels to the 1-2pm peak period (and therefore the 2-hourly time slots either side).

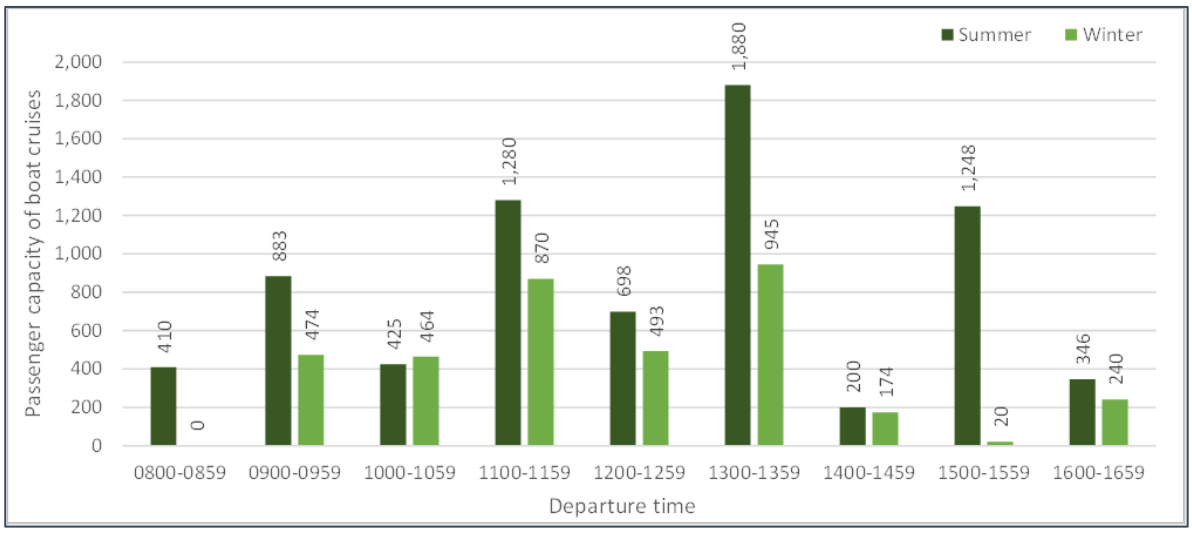

Figure 20: Av. daily boat cruise capacity/hr, 2018/19
(Milford Sound Tourism, Fresh Info)

2.39 Figure 21 shows the same passenger capacity data as the graph above but is divided into 15-minute increments. The impact of the 1-2pm peak on other time slots is once again evident in the data and provides useful insight into the patterns of congestion Milford Sound has experienced in recent years.

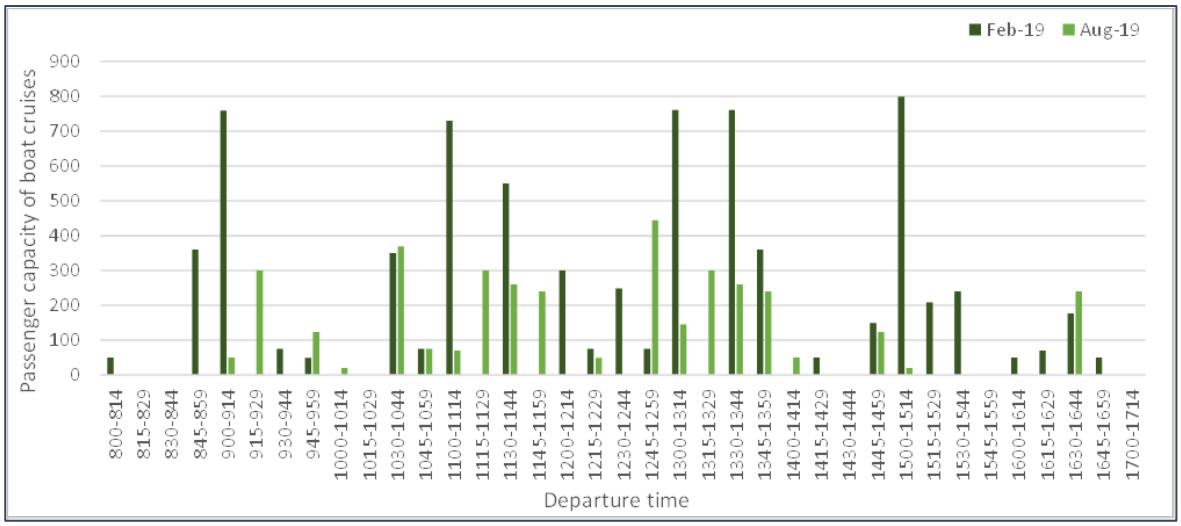

Figure 21: Av. daily boat cruise capacity/15mins, 2018/19
(Milford Sound Tourism, Fresh Info)

2.40 Combining the passenger capacity data above with reported monthly passenger counts allows us to estimate the average capacity utilisation of the vessels operating in Milford Sound (Figure 2.22). The results of this analysis reveal an average utilisation rate of between 23% (August) and 52% (February), with an average across the year of 40%[10]. This has two important implications:

2.41 Boat operators in Milford Sound are operating well below capacity most of the time. here is evidence that the resulting 'fight for customers' has led to significant discounting and commercially unsustainable returns for some operators.

2.42 The current boat fleet could absorb a significant amount of additional demand, especially if it was outside the current 1-2pm peak. The main constraint on growth is therefore the time of day that

[10] Note: At certain very popular times of day in peak season passenger numbers are often at or near capacity.

passengers arrive in Milford Sound, rather than the overall number of visitors. With a more uniform demand profile across the day, it would be possible for boat operators to carry many more passengers with less congestion in Milford Village.

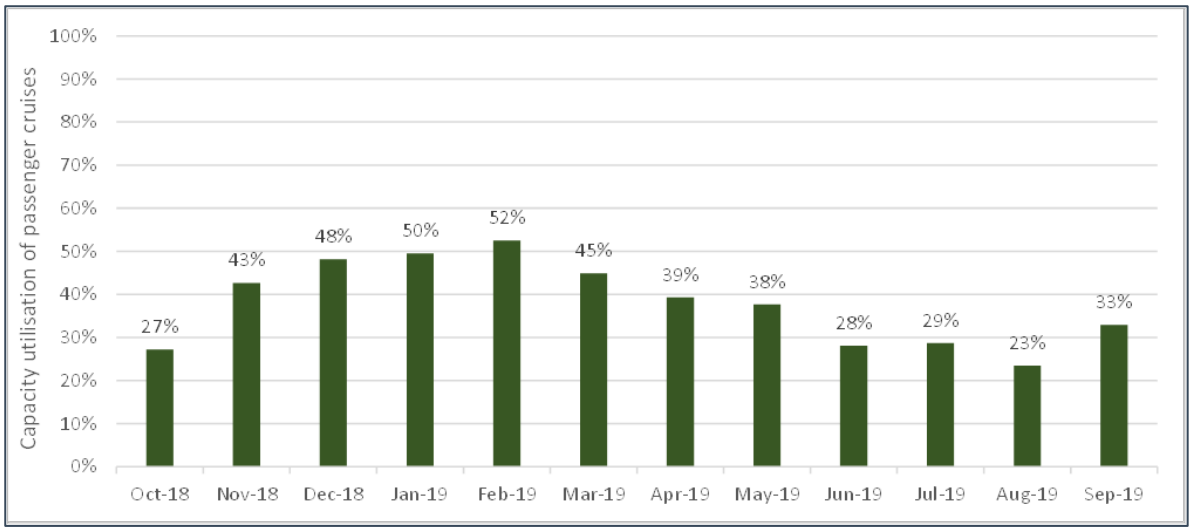

Figure 22: Boat cruise capacity utilisation, 2018/19
(Milford Sound Tourism, Fresh Info)

ECONOMIC FOOTPRINT

MILFORD SOUND IS A CRITICAL DRIVER OF THE LOCAL VISITOR ECONOMY

2.43 Visitors to Milford Sound spent approximately $190m in the local study area of Milford Sound, the Milford corridor, Te Anau and Manapouri in 2019 (Figure 23). This is equivalent to 77% of the entire Fiordland visitor economy.

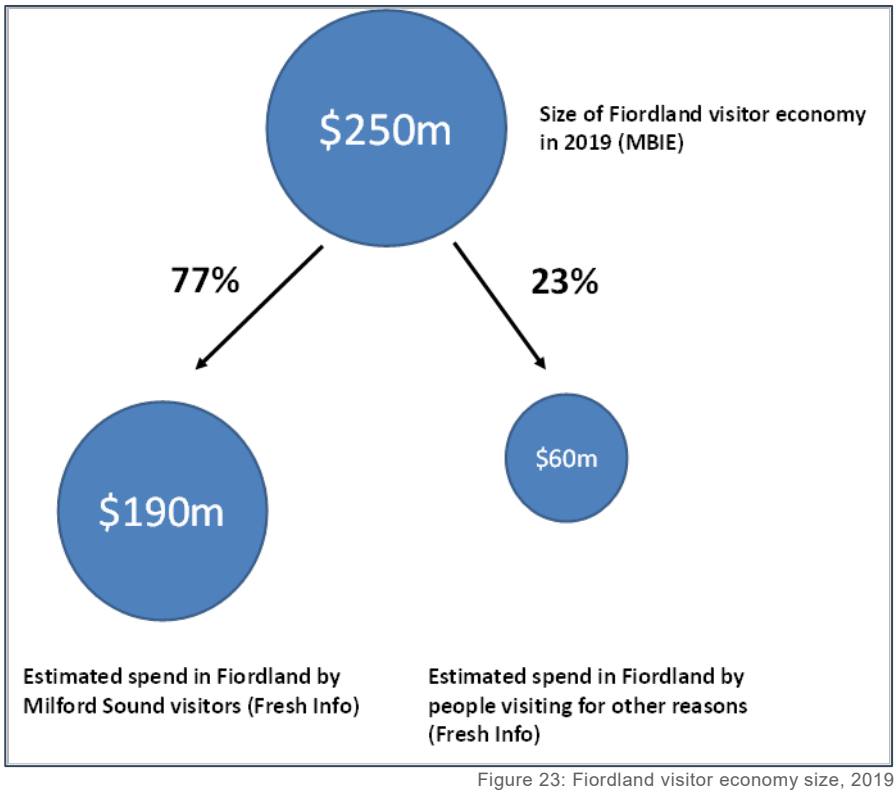

Figure 23: Fiordland visitor economy size, 2019

INTERNATIONAL VISITOR CHARACTERISTICS

2.44 This section uses data from MBIE's International Visitor Survey (IVS) to understand the characteristics of international visitors to Milford Sound. The IVS is the main source of information about the characteristics and behaviours of international visitors to New Zealand.

2.45 We have collapsed data cross multiple years (2014-19) to overcome sample size issues and reveal the underlying structure of international visitation to Milford Sound. The estimates are therefore approximate only and should not be interpreted as precise estimates of current activity.

2.46 Insights are summarised for international visitors as a whole and by cross-country comparisons to highlight any notable nationality-specific features. Full findings by nationality are summarised in Appendix 2.

SUMMARY POINTS

2.47 Australia is the largest source of international visitors to Milford Sound, followed by the United States, China, the United Kingdom and Germany (Figure 24).

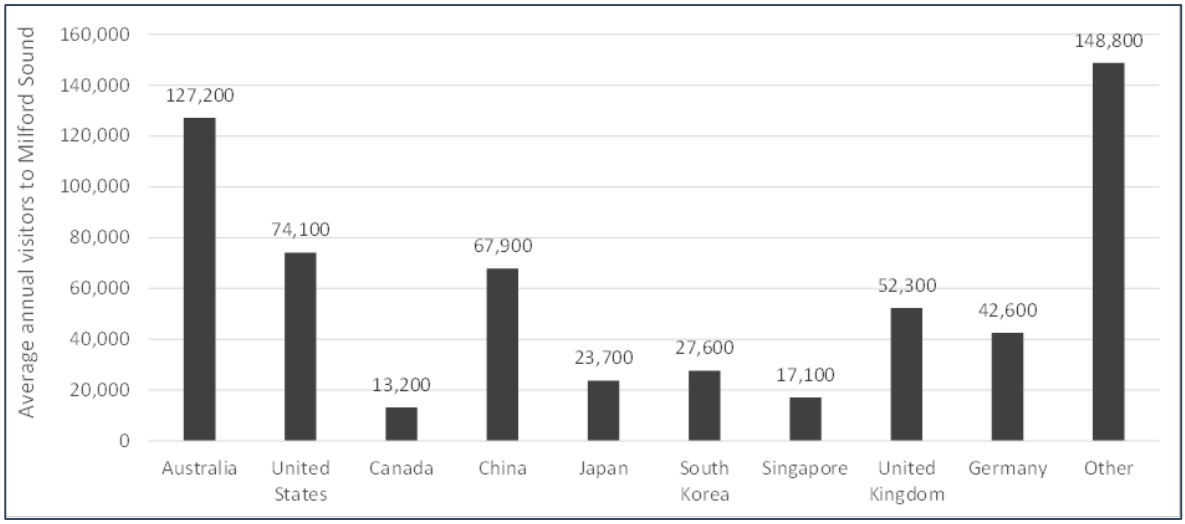

Figure 24: Av annual visitor no's to Milford, 2014-19

2.48 International visitors only spend a small amount of their total time in New Zealand in the study area (defined as Milford Sound (including the Milford corridor), Te Anau and Manapouri). This ranges between 0.3 nights for visitors from South Korea (out of 10.5 nights total stay in New Zealand) to 2.6 nights for visitors from Germany (out of 67.5 nights total stay), (Figure 26).

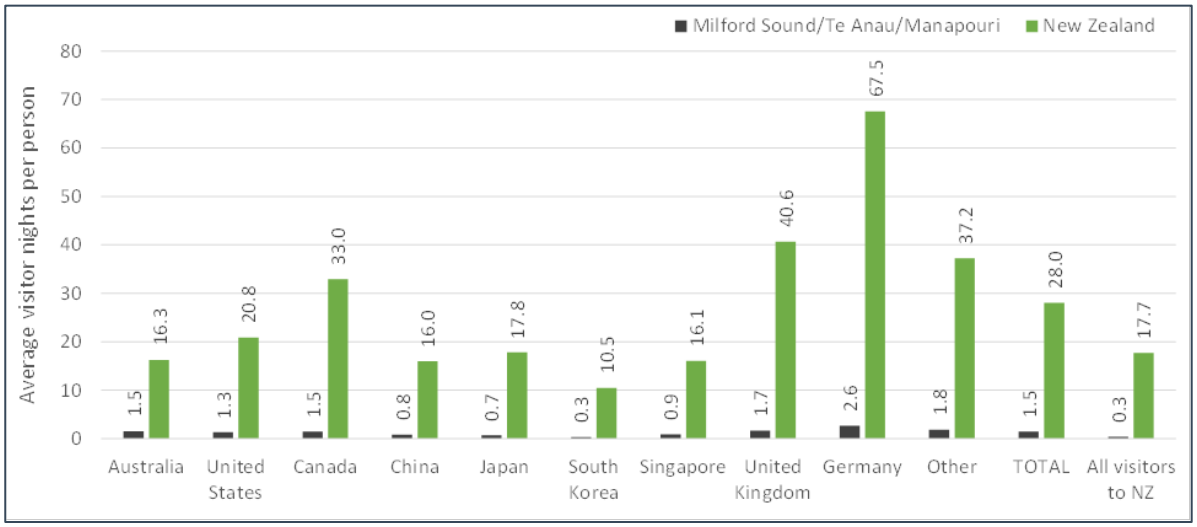

Figure 25: Av. nights in NZ - visitors to Milford, 2014-19

2.49 Visitors from South Korea and China spend the highest amounts per night while they are in New Zealand at $336 and $318 respectively. It is important to note that this relates to spend across their entire trip, rather than just their spend in the study area. Germans spend the lowest amount per night at $100 (Figure 26).

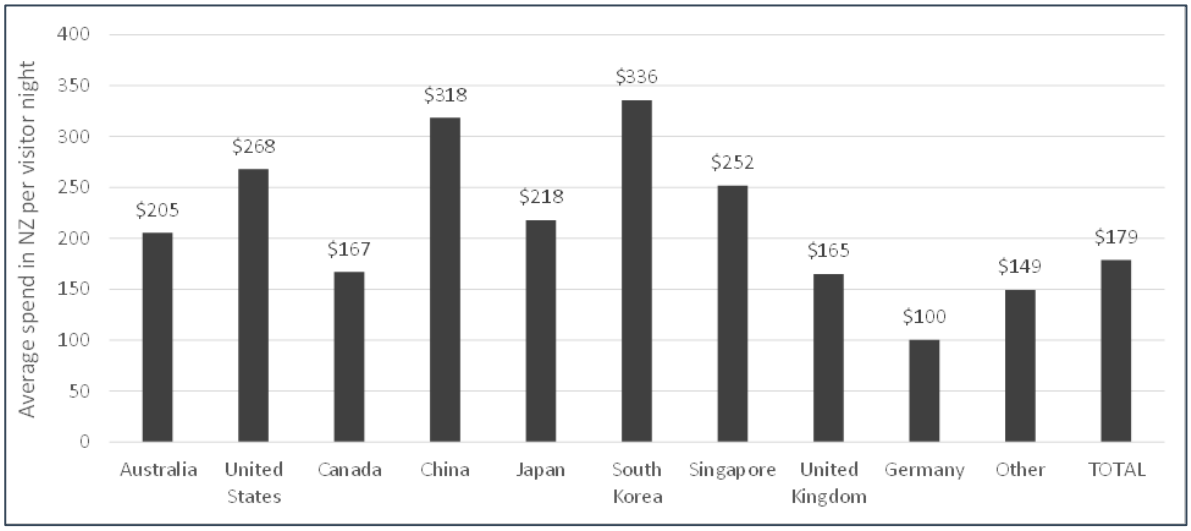

Figure 26: Av. spend/night in NZ - visitors to Milford, 2014-19

2.50 Milford Sound attracts higher shares of young people (15-34 years) and seniors (55+ years) than New Zealand as a whole, and a lower share of people aged 35-54 years (Figure 27).

2.51 There is wide variation in age compositions across origin markets e.g., Germans are predominantly young and South Koreans are predominantly 55+.

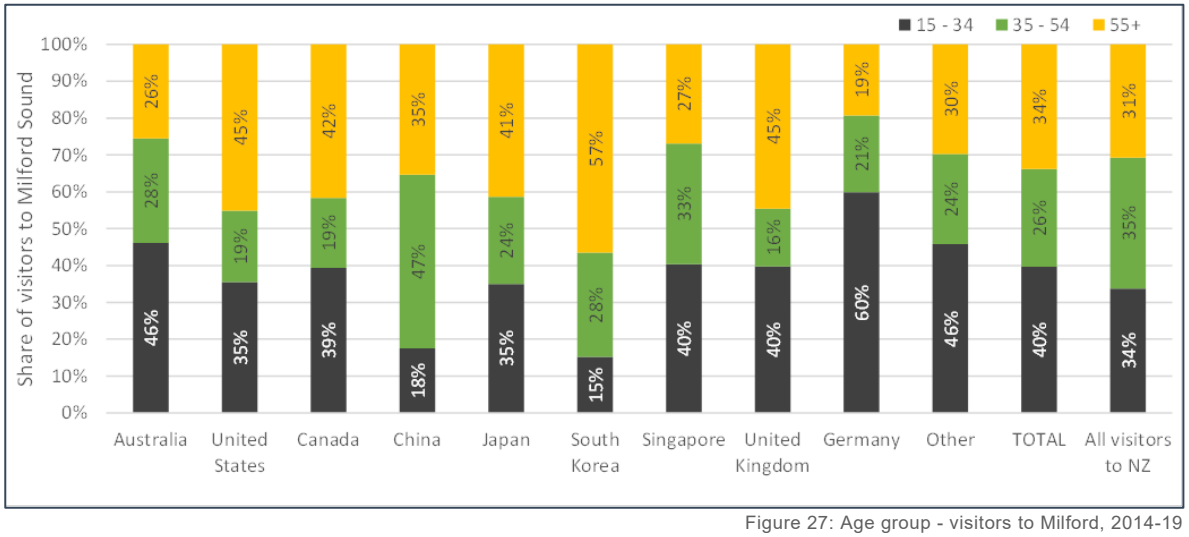

Figure 27: Age group - visitors to Milford, 2014-19

2.52 Milford Sound attracts a slightly higher share of females than New Zealand as a whole.

2.53 There is relative uniformity in the gender balance across origin markets, except for China which has a notably higher share of females than males (Figure 28).

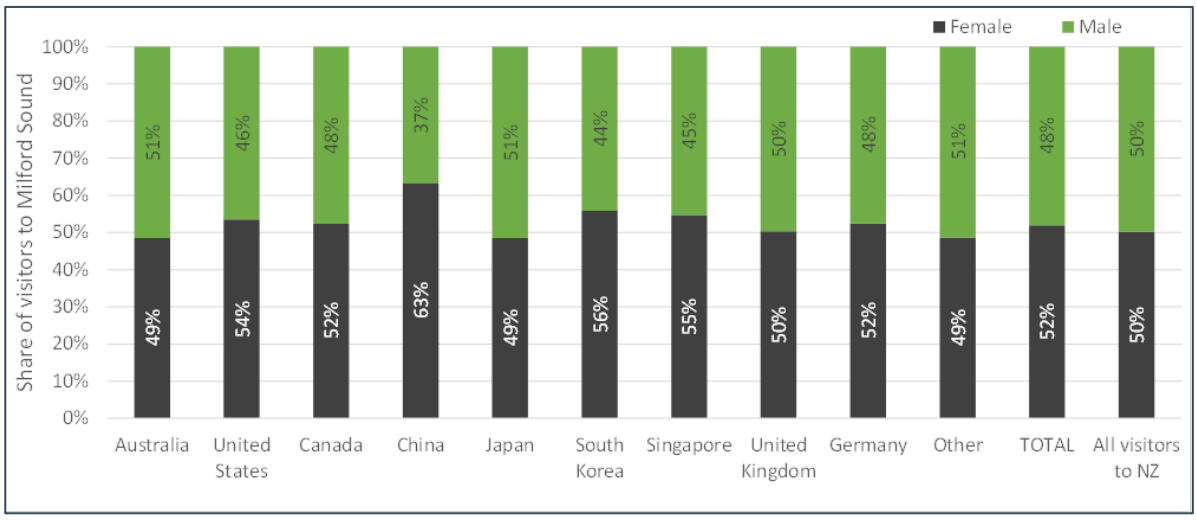

Figure 28: Gender - visitors to Milford, 2014-19

2.54 Milford Sound attracts a much higher share of holiday visitors than New Zealand as a whole (Figure 29).

2.55 Around 84% of international visitors to Milford Sound are travelling to New Zealand for holiday (i.e., vacation) purposes, and a further 9% are visiting friends and relatives. This explains why international visitation to Milford Sound is so highly correlated with international holiday arrivals to New Zealand (see back in Figure 2).

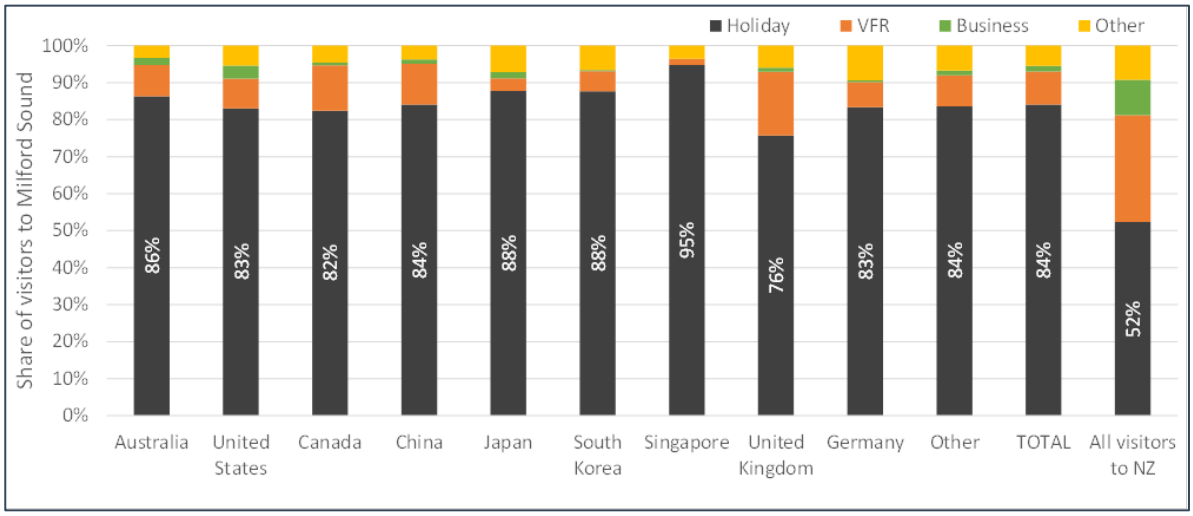

Figure 29: Purpose of NZ travel - visitors to Milford, 2014-19

2.56 Milford Sound attracts a higher share of package/tour travellers than New Zealand as a whole. A package/tour traveller is someone who mainly travels with an organised tour or group while they are in New Zealand.

2.57 Around 73% of international visitors to Milford Sound travel through New Zealand as independent travellers, while the remaining 28% travel as part of an organised tour (Figure 30).

2.58 Members of either group may purchase scheduled day tours to Milford Sound e.g., out of Queenstown or Te Anau.

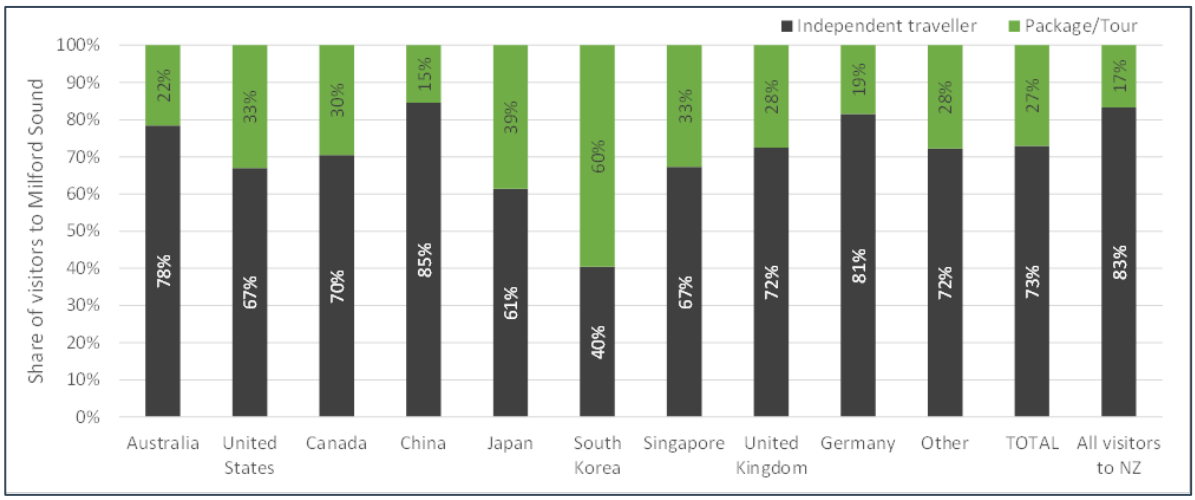

Figure 30: NZ travel style - visitors to Milford, 2014-19

2.59 Auckland Airport is the most popular international gateway for international visitors to Milford Sound (57%), followed by Christchurch Airport (28%), (Figure 31).

2.60 Only 12% of international visitors (most of whom are from Australia) enter New Zealand through Queenstown airport.

2.61 Some visitors who enter via Auckland will use the domestic air network to fly to Queenstown or Invercargill, while others will drive (data regarding these shares is not available).

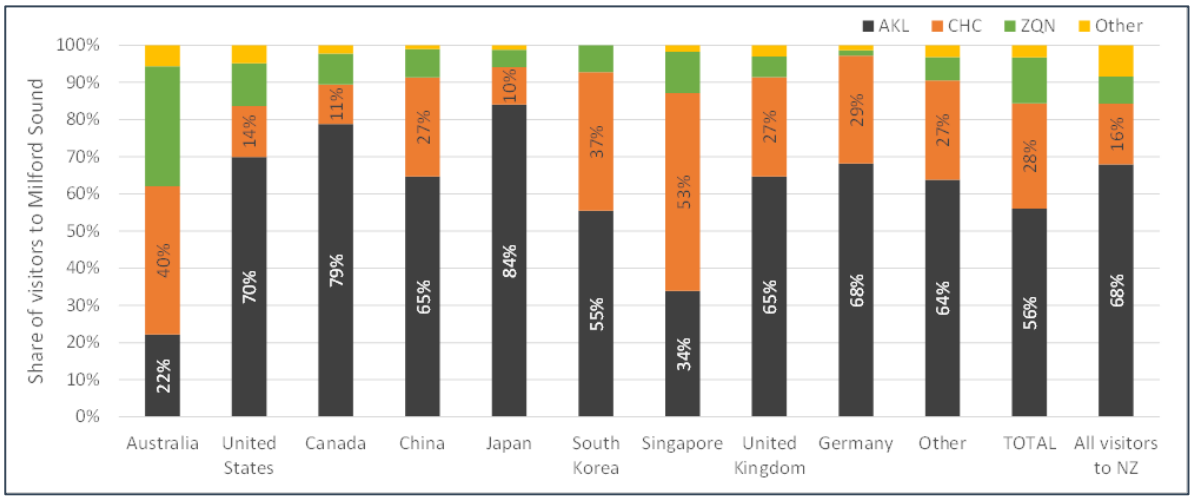

Figure 31: Int. port of entry - visitors to Milford, 2014-19

2.62 Around 92% of international visitors to Milford Sound are adults, compared with 88% for New Zealand as a whole (Figure 32).

2.63 China has the lowest adult share at 87% and Japan has the highest share at 99%.

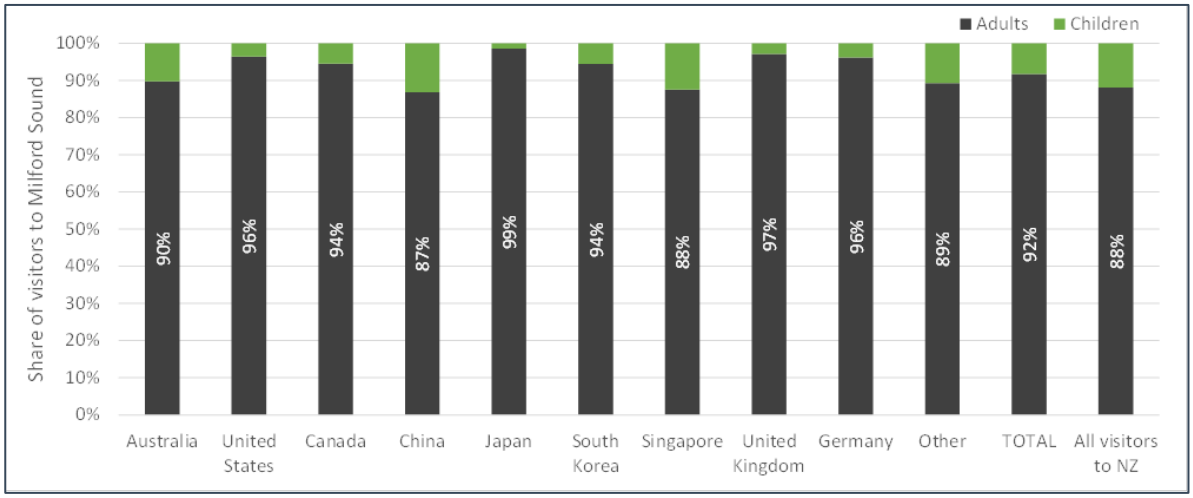

Figure 32:Travel party composition - visitors to Milford, 2014-19

3 RECREATIONAL USE

ACTIVITY TYPES AND SCALE

3.1 The types of recreational activities being undertaken around Te Anau / Manapouri and along the Milford Corridor to Milford Sound Piopiotahi are wide ranging and include:

- **Tramping:** multi-day walking into backcountry areas and track networks along marked tracks and unmarked routes, including along the higher use Great Walks.
- **Walking:** short-stop to full day walks along marked tracks to a range of attractions including some very popular sites.
- **Climbing:** bouldering through to multi-day trips predominantly in the Darran Mountains along the Milford Road.
- **Nature / scenic observation:** either in front country or backcountry locations for passive enjoyment sometimes in association with activities such as photography.
- **Hunting:** Hunting for introduced game animals (such as deer, thar, goats, and ducks).
- **Fishing:** Fresh and saltwater fishing for a diversity of species using a range of fly fishing, spinning, surfcasting, boating and game fishing tackle.
- **Diving and snorkelling:** for both extractive and nature observation purposes.
- **Sailing, boating, kayaking and jetboating:** on coastal and inland waterways for the activities themselves and for access to other activities.
- **Pack Rafting:** Tramping into remote areas with inflatable mini-rafts and then traveling down rivers/ along lakes etc either for activity itself or for including water-links in longer walks.
- **Mountain biking and cycling:** on defined roads (not trails) in the National Park (e.g., Milford Highway, Hollyford Road, Borland Road and connections etc) with trail options around Te Anau / Manapouri (e.g., Ivon Wilson Park, Te Anau lakefront to Control Gates, Lake2Lake Trail, Upukerora Trail, Perenuka MTB Park, new cycle trails/connections etc)
- **Camping:** Varying levels of overnight camping at defined campsites and in backcountry areas.

3.2 The Fiordland National Park Management Plan (DOC 2007) provides very comprehensive overview descriptions of the activity profiles for the whole park and for the respective Visitor management Settings within it.

PATTERNS OF USE

3.3 The scale of activity is varied across the Milford Corridor and surrounds. The heaviest areas of activity occur around trail network hubs and on the more formed tramping and walking tracks off the Milford Road. Front country sites are more heavily used than backcountry sites.

DEPARTMENT OF CONSERVATION CONCESSIONS

3.4 Concessions are DOC's primary business mechanism for managing the use public conservation land to run a business or activity. These represent the tourism business sector with direct use and economic connections to Fiordland National Park and its related supporting communities.

3.5 Concessions cover a wide variety of activities that are either directly or indirectly related to tourism and recreation activities. These can include conducting tourism and recreation activities, providing accommodation and/or other support facilities, allowing other non-tourism business activities, and providing for wider infrastructure and facility services that may only indirectly support tourism (as part of fulfilling wider societal needs). Consequently, the economic impacts of

activities related to concessions can penetrate many aspects of local community economies, as summarised in selected New Zealand National Parks (including Fiordland) in the DOC report by Wouters (2011).

3.6 They may range from concessions for one-off activities through to ongoing long-term regular uses, and applications may be either non-notified or publicly notified (for submission processes etc) subject to the scale of potential impacts. Costs may be one-off or regular instalment management fees subject to concession type. The following list summarises the full range of activities requiring a concession, organised in approximate order of tourism activity specificity.

BACKGROUND – CONCESSION TYPES

3.7 Recreation Concessions (primarily delivering experiences):

- Guided walking (conforming) - There are a number of tracks across New Zealand that are available for guided walking if certain conditions are followed ('conforming' tracks).
- Land-based guided activities - To provide for land-based guided activities such as walking, hiking, tramping, climbing, hunting, fishing, biking or motorised vehicles.
- Sporting events - To hold sporting events such as a 4WD club trips/rallies, off-road running races, multi-sport events.
- Watercraft activities - To provide watercraft activities such as kayaking, boat landings or use of DOC wharves.
- Aircraft activities - Aircraft activities on or over public conservation lands and waters, including both commercial operations and private recreational activities.
- Aerially assisted trophy hunting - To use a helicopter to carry out aerially assisted trophy hunting, either commercially or for personal gain.
- Marine mammal permits – if an activity involves interaction with marine mammals a permit is required.

3.8 Infrastructure Concessions (primarily facilitating delivery):

- Private or commercial structures - To build or use private or commercial facilities or structures for tourism or non-tourism needs, such information centres, weather stations, or private or commercial campgrounds.
- Tenanting or using existing structure - To apply for a tenancy or use any existing structure or facility on public conservation land for tourism or non-tourism needs, including the permanent use of a historic building for a business or community group.
- Access/easements - For access across public conservation land for businesses or private property, including conveying electricity, telecommunications, water and gas or right of way for vehicles or stock.

3.9 Other non-tourism activities requiring concessions include Animal pest control operations; National wild animal recovery operations; Beekeeping; Commercial drone use; Filming; News media access; Fish passage authorisations; and Grazing.

MILFORD FIORDLAND CONCESSIONS

3.10 There are many organisations and individuals holding concessions to operate numerous and diverse services and facilities on conservation lands around Milford Sound, the Road Corridor, Te Anau and Fiordland National Park. These represent the 'frontline' businesses/activities of the tourism sector. They in turn are part of a wider Subregional/Regional tourism business interface, including wider transport, accommodation, in-bound tour and other providers of necessary goods and services that collectively have high socioeconomic significance for park-proximate

communities. This is particularly true for those communities where domestic and international tourism activities represent significant components of local economies (such as Te Anau).

3.11 This section summarises specific Milford/Fiordland concession-holders as the tourism business/activities 'frontline'. It is important to note that many tourism businesses have wide-ranging offers, and many include separate concessions for multiple components. It is also helpful to reiterate a primary distinction between:

- Recreation Concessions - for recreation/tourism service delivery), and
- Infrastructure Concessions - for infrastructure facilitating recreation, tourism and other (non-recreation/tourism) service delivery (excluding concessions for telecommunications etc)

3.12 There are often overlaps between multiple concessions held for different purposes in the same areas by the same holders. In addition, some concession record duplicates were included in the original data as the source database was from a live working tool. Figures are as received and subsequently summarised and should be considered as having closely approximate accuracy rather than fully precise. Extensive editing would have been required to reduce variabilities in what are only relatively minor details, and this was not considered necessary in terms of project needs.

3.13 At May 2020 there were the following total figures for concessions associated with Milford and Fiordland National Park

- 282 concession-holders with a total of 397 individual concessions, breaking down to:
- 259 'Recreation' concession holders with 319 recreation concessions
- 30 'Infrastructure' concession holders with a total of 76 infrastructure concessions.

3.14 The available concession data underscores the level and breadth of commercial activity already present within Fiordland. The reach of activity may be extensive (due primarily to aircraft concessions) however most activity is concentrated in the more easily accessed areas (relatively speaking), particularly in areas such as the Milford corridor, Milford Sound Piopiotahi and to a lesser extent along the great walks. Large areas remain comparatively untouched by commercial and recreational concessions.

RECREATION CONCESSIONS – NUMBERS/TYPES

3.15 The largest volume of 'recreation' concessions relate to guiding on visitor experiences, which is most associated with walking experiences (short-stop or part-day/day/multi-day trips), and to a lesser extent more specialised recreation activities such as kayaking, packrafting, photography and climbing (Table 4).

3.16 In terms of visitor numbers, the majority of such concession walking activities are for short stops (usually <30min) as breaks on the coach drive to Milford Sound Piopiotahi, although there are many offers for longer and/or multi-site experiences – often on bespoke tours.

3.17 Commentary on coaches, aircraft and boats also represents a degree of informal non-concession 'guiding' in terms of interpretation, advice and storytelling.

3.18 Commercial land vehicle transport to Milford Sound usually includes some activities at stop/break sites along the Milford Road, for which concessions are held. Some of these operators have concessions to park at such sites but not to engage in any guiding (minivans/coaches especially).

3.19 Where boat activities on Milford Sound (or any of the other Fiordland Sounds/Lakes) involve landings there may also be concessions for walking (guided/unguided) or for any other additional activities undertaken on cruises such kayaking. Boat cruise operators on the Fiordland Sounds will typically have concessions associated with the mechanism of Marine Mammal Watching permits.

Table 4: Recreation concessions – numbers and types

Recreation Concessions	Concession Holders	Concession Numbers	Notes (Milford sites, many Corridor Sites, some beyond)
Guiding	176	216	23 multiple concession holders (larger companies have more individual activity concessions e.g., Real Journeys, Fiordland Outdoors Company, Tourism Milford), and others for mostly short walks on tours/packages, some for specialist recreation activities – kayaking, packrafting, photography. Many can also include land transport services (as part of guided/led tours).
Aircraft	46	52	Mostly for Milford landings, with 5 holders having multiple concessions (e.g., fixed wing/helicopter, Milford/backcountry). Some individuals/groups for one-offs/occasional uses
Vehicle	23	23	For short-stop sites used by coach/shuttle passengers- with some carpark-only uses, and a few other types (e.g., vehicle relocations).
Marine Mammal Watching	16	16	All mainly Boat Cruises, some kayak.
Filming/ Photography	5	5	Various photography tours/workshops.
Boating (non-tour/cruise)	5	5	Water taxis, charter services, private diving, barges
Attractions	1	1	Te Anau-au Caves
Events	1	1	Routeburn Classic
Total recreation concession holders	*259*	*319*	*(some holding multiple types and multiple concessions/type)*

(from DOC Permissions Database)

INFRASTRUCTURE CONCESSIONS – NUMBERS/TYPES

3.20 There are far fewer 'Infrastructure' concessions where permitted built facilities and defined easements etc are present (Table 5).

3.21 These are predominantly either buildings/structures/utilities to support some substantial visitor service delivery.

3.22 Those serving some wider service need (e.g., telecommunication networks, power supply, weather stations, other monitoring equipment etc) are not included here. A few 'tourism' facilities are also used jointly to other commercial activity (predominantly fishing-related).

Table 5: Infrastructure Concessions – Numbers and types

Infrastructure Concessions	Concession Holders	Concession Numbers	Notes (predominantly located at Milford Sound Piopiotahi, with a few in other locations)
Structures	17	41	11 multiple concession holders (larger companies have more individual infrastructures concessions) and others for various buildings, materials storage, fuel, utilities easements, power supply, slipways e.g., Milford Sound Tourism, Real Journeys, Tourism Milford).
Telecommunications	14	25	11 with multiple concessions and other singles for telecommunications towers, weather stations, utilities easements, radio

Infrastructure Concessions	Concession Holders	Concession Numbers	Notes (predominantly located at Milford Sound Piopiotahi, with a few in other locations)
			repeaters, monitoring equipment (e.g., Waka Kotahi, NIWA, Airways Corporation.
Accommodation	17	22	5 with multiple concessions and other singles mostly for staff and some commercial/hotel/lodge accommodation/services at Milford
Storage	4	4	Fuel, material and equipment storage (overlaps with Structures)
Marine Reserve Authorisations	3	6	Marine Reserve use/moorings/observatory
Access	2	2	Vehicle easement, access to Deepwater basin.
Non-research	1	1	Te Anau Golf Course
Total infrastructure concession holders	*30*	*76*	*(some holding multiple types and multiple concessions/type)*

RECREATION CONCESSION SITES

3.23 The sites where concessions are held can broadly be grouped into three areas:

- Milford Sound Piopiotahi
- Milford Road Corridor (Short-stops/Activity sites)
- Wider Te Anau/Manapouri

3.24 Here these are mainly related to recreation concessions. The Milford Village/Deepwater Basin Area was the only location for significant numbers of infrastructure concessions.

3.25 These recreation concessions covered activities undertaken at a range of sites in conservation areas (predominantly Fiordland National Park), with many concessionaires having concessions for many multiple sites across Fiordland, the Southern Region and/or New Zealand.

3.26 This was particularly evident among those engaged in either New Zealand/Regional-wide packages based on providing land transport (e.g., coach, shuttle, minivan transport/tour groups) or those engaged in small bespoke outdoor experience activities and guiding (e.g., guided walks, photography tours). In these cases, there were numerous specific sites included under respective concessions, which in some cases spanned across the wider protected area network of New Zealand.

3.27 These defined concession sites vary significantly in relative use levels and purpose and represent broadly different types of visitor experiences. In addition, some sites with high numbers of concessions had relatively low visitor numbers (and vice versa).

MILFORD SOUND PIOPIOTAHI

3.28 Summary information - the Milford Sound Area.

Table 6: Milford Sound Recreation Concession Sites

Milford Sound Area Sites	No. of Holders	Concession Purposes
Milford Foreshore Walk	70	Primarily for short walks at Milford Sound
Milford Sound Lookout Walk	48	Primarily for short walks at Milford Sound
Milford Airport	47	Aircraft landings for boat trip/scenic flight options, some private options
Tutoko Valley/Bridge	16	Primarily for short stops/breaks on trip to Milford (e.g., coach/shuttle/tour)
Milford Marine	14	Boat cruises – scenic, wildlife, overnights, diving
Milford Track	12	Doing the whole track, guiding services
Milford Track (Sandfly Point)	4	Day/short walking options from Milford Sound
Bowen Falls	3	Primarily for short walks at Milford Sound
Cleddau River	1	Short guided walks in area
Grave Talbot Track	1	Primarily for short walks into nearby valleys/alpine areas
Milford Village /Deepwater Basin Area	0	Noted for 18 infrastructure concession holders with 42 individual specific concessions. Also parking provisions.

3.29 This **Milford Sound Area** is based around a **Milford Sound Primary Destination Area**, featuring concessions for:

- Milford Sound /Harbour Area as base for Boat-based cruise (and other) activities.
- Milford Sound Foreshore and Lookout for short walks at Milford Village.
- Milford Airport for activities including Aircraft use.
- Milford Track main exit, day-walk activities.
- Milford Sound Village Area for some variable coach operator parking (most larger operators have parking provisions/specified sites included in wider concessions).
- Larger visitor numbers appear to be associated with Boat Cruise concessions and related land transport concessions (with aviation concessions to a lesser extent).
- The predominant Visitor Group represented here are ‘Day Experience Visitors’ (refer Section 6, Tables 19 and 20 for descriptions).

MILFORD ROAD CORRIDOR

3.30 Summary information - the Milford Road Corridor.

Table 7: Milford Road Corridor Recreation Concession Sites

Milford Road Corridor Sites	No. of Holders	Purposes
The Chasm	125	Short stops/breaks on trip to Milford (e.g., coach/shuttle/tour)
Mirror Lakes	113	Very short stops/breaks on trip to Milford (e.g., coach/shuttle/tour)
Lake Gunn	70	A tour option for part-day walks, linked to Cascade Creek camping, not short stop visits.
Hollyford Track/Valley	58	A tour option for day walks, some full walk longer options
Routeburn Track	53	A tour option for part day/day walks, some full walk longer options, linked to Key Summit day use. Not short-stop visits.

Milford Road Corridor Sites	No. of Holders	Purposes
Lake Marian Track - Lower	48	A tour option for shorter stops/day walks (short/easy walk option)
Homer Tunnel Area	41	A tour option for part-day/day walks – shorter/easier and full track
Eglinton Valley, Flats, River	31	Various guided walking, kayaking, fishing, packrafting options in Eglinton Valley (and East Eglinton), some short stop visits by coaches.
Key Summit	30	For guiding on day walks up to scenic ridgeline lookout
Monkey Creek	26	Primarily for short stops/breaks on trip to Milford (e.g., coach/shuttle/tour)
Gertrude Valley	24	Guiding on short/part day walks up valley / photography
Cascade Creek	16	Camping and part day walks (Lake Gunn), not short stop.
Knobs Flat	16	Various guided walking, kayaking, packrafting options in Eglinton and around Knobs Flat, short stop visits by coaches.
Gertrude Saddle	16	Guiding on day walks up valley to scenic saddle / climbing / photography
Lake Marian Track - Upper	13	A tour option for longer/part day walks (full/harder walk option)
Dore Pass	12	Guided alpine trips to Pass or fully over it to Milford Track.
Te Anau Downs	12	Access to Milford Track (full walk/day trips), areas across Lake Te Anau
Lake Mistletoe	12	Guided short walk option around lake
Pops View	10	Primarily for short stops/breaks on trip to Milford (e.g., coach/shuttle/tour)
Glade Wharf	7	For Milford track use or day/short walking options
Milford Track (Glade Wharf)	6	Day/short walking options
Deer Flat	6	Primarily campsite, some short walks
Falls Creek	4	Guided alpine day walks
Mistake Creek	4	Guided alpine tramping trip loop with Hut Creek
Hut Creek	4	Guided alpine tramping trip loop with Mistake Creek
Boyd Creek	2	Guided short walks/day trips
Henry Creek	2	Primarily Campsite

(from DOC Permissions Database)

3.31 This second **Milford Road Corridor Area** comprises two summary visitor use / broad visitor group[11] contexts.

3.32 The **first** being **Milford Highway Short-Stops**, featuring concessions for:

- The Chasm and Mirror Lakes as primary sites of concession supplementary visit interest on primary day-visit journeys to Milford Sound (with longer short stops especially The Chasm).
- A few brief concession uses made for short stops/photos/wildlife encounters etc at various sites sometimes including Eglinton Valley (mainly photo stops), Knobs Flat (main convenience stop), Cascade Creek (camping as required), Monkey Creek, Homer Tunnel, Tutoko Bridge/Valley for short stops/photos/wildlife encounters etc.
- All of these are also used by non-concession visitors (NZ and International), often representing the significant bulk of use at some.

[11] For 'Visitor Group' descriptive reference refer Section 5: Visitor Personas & Typology content (noting Tables 6-1 & 6.2)

- Larger visitor numbers appear to be associated with concessions to use The Chasm walk, and the short-stops at Mirror Lakes, Monkey Creek, Homer Tunnel. Other sites are included in many concessions but are much less visited.
- The predominant Visitor Group represented here are 'Short Stop Attraction' Visitor (refer Section 6, Tables 19 and 20 for descriptions).

3.33 The **second** being **Milford Corridor Activities/Access**, featuring concessions for:

- Routeburn Track and Hollyford Track (whole trip entry/exit and day-uses)
- Routeburn-Key Summit walking options
- Lake Gunn Nature Walk (and Cascade Creek camping)
- Gertrude Valley and Gertrude Saddle (walks) and some climbing access options
- Tutoko Valley (short stops, occasional walks and infrequent tramp/climb access)
- Eglington Valley uses (walking, fishing, packrafting etc) and access to short walk/tramping-climbing backcountry options (e.g., Hut & Mistake Creek, Dore Pass, Boyd Creek)
- Lake Marian walks (in Hollyford valley).
- All of these are also used by non-concession visitors (NZ and International), often representing the significant bulk of use (especially more backcountry areas).
- Notable visitor numbers appear to be on walks associated with Routeburn/Key Summit, Lake Gunn, Hollyford and Lake Marian (often also concession-independent), although numbers are much lower than for 'Milford Sound Primary Destination' and 'Milford Highway Short Stops', where coach-based tour visitors are much more prominent.
- Visitors to the Corridor activities are typically very site/activity-specific and not necessarily on a trip incorporating Milford Sound.
- The Visitor Groups represented here are more a mix of mainly 'Day Experience Visitors' and to a lesser extent 'Front country Overnight Visitors' and a few more 'Backcountry' types of experience visitors (refer Section 5, Tables 19 and 20 for descriptions).

WIDER TE ANAU/MANAPOURI AREA

3.34 The third Wider Te Anau/Manapouri Area coves a wider catchment across the rest of Fiordland.

Table 8: Wider Te Anau/Manapouri Recreation Concession Sites

Wider Te Anau/ Manapouri Sites	No. of Holders	Purposes
Kepler Track	52	A tour option for day walks, some full walk longer options
Waiau River	25	Various activities in and along river - guided/unguided walking, biking, river trips, pack rafting, fishing, photography trips.
Borland Area	19	Guided day walks, bike options, wider access /connection options
Doubtful Sound/Deep Cove	18	Various activities around Sound – boat cruises/water taxis/charter boats, guided/unguided walking/tramping, kayaking, fishing/hunting.
Lake Hauroko	16	Boat transport/trips/taxis, longer walking trips, fishing
Brod Bay	15	A tour option for day walks, kayaking trips, part-Kepler walks
Darrans Remote	14	Remote alpine guided walking, climbing, fishing etc

Wider Te Anau/ Manapouri Sites	No. of Holders	Purposes
Lake Te Anau	13	Various activities around Lake – guided/unguided walking, kayaking, boat cruises/water taxis, vehicles, biking, fishing, photography (overlap Kepler Track, Waiau River)
Dusky Sound /Track	12	Charter boats, guided/unguided walking/tramping, kayaking, fishing/hunting.
Wilmot Road/ Pass	12	Doubtful Sound/Deep Cove/Dusky Track access
Lake Monowai	11	Boat transport/trips/taxis, longer walking trips, fishing
Manapouri South Arm	9	Boat access to campsite, Percy Pass Route, Borland Road and south
Manapouri West Arm	8	Boat access to campsite, Wilmot Road, Doubtful Sound, Dusky Track
Hidden Lakes	5	Guided day walks, boat access
Glaisnock River	5	Guided backcountry fishing, hunting, boat access
Worsely River	4	Guided backcountry fishing, hunting, boat access
Other Te Anau	2	Access to and activity at Te Anau Au Caves

(from DOC Permissions Database)

3.35 This **Wider Te Anau/Manapouri Area**, features concessions for:

- Various 'backcountry' sites/activities/accesses around Lakes Te Anau and/or Manapouri (boat cruises/water taxis access and related uses for walking, kayaking, biking, fishing, photography etc)
- Kepler Track (whole trip entry/exit and day uses, especially Brod Bay)
- Waiau River uses (e.g., jetboat, kayak, packrafting, fishing)
- Lake Manapouri-based access/activity in Fiordland backcountry (e.g., via West Arm to Wilmot Pass/Deep Cove/Doubtful Sound/Dusky Track) – including major uses (predominantly Doubtful Sound boat cruises and access by land/air)
- South-Eastern Fiordland connected via Dusky Track, Lake Hauroko, South Arm (Lake Manapouri) Borland Area. Note that these areas connect south to DOCs newest Great Walk (the Hump Ridge Track) and the Fiordland southern coastline.
- Larger visitor numbers are associated with the Kepler Track and related day uses such as Brod Bay (often also independent concession-independent) and with Doubtful Sound (predominantly concession-based), with lower numbers also accessing backcountry options via the lakes (some of which connect to wider opportunities further south).
- The Visitor Groups represented here are more a mix of mainly 'Day Experience Visitors' and more 'Backcountry' types of experience visitors (refer Section 6, Table 19 and 20).

INFRASTRUCTURE CONCESSION SITES

3.36 These concessions covered facilities in conservation areas (Fiordland National Park) associated with supporting tourism, other approved commercial activity (mainly fishing or air/sea services), or priority networks (e.g., roading, telecommunications, power, weather data etc), (Table 3.6).

3.37 These were highly concentrated in Milford Sound and included staff accommodation, visitor service buildings, hotel accommodation, transportation hub facilities (e.g., airport service buildings, marine service buildings, wharves/jetties/slipways).

3.38 There were multiple land transport service sites along the Milford Road (SH94).

3.39 A small number of automated telecommunications/weather data sites were also scattered across wider Fiordland.

Table 9: Infrastructure Concession sites

Infrastructure Concession Sites	No. of Holders	Notes
Milford Village/Deepwater Basin Area	18	Various Buildings, infrastructure, utilities, easements for tourism/staff activity spread over 42 individual concessions, with 13 held by Milford Sound Tourism.
Milford Marine Area	4	7 concessions covering moorings, observatory, kayaking base
Lake Te Anau/ Downs / Other Te Anau	7	Boat moorings, slipways, Petroleum storage, Waka Kotahi storage, gravel extraction, dump (various sites SH94)
Doubtful Sound/ Deep Cove	3	Deep Cove Hostel, wharf, petroleum storage/piping
Homer Tunnel Area	3	NZAC Hut, Waka Kotahi storage, gravel extraction, dump (various sites SH94)
Knobs Flat	3	Knobs Flat buildings/infrastructure, gravel extraction, dump (also various sites SH94)/ Downer Road Maintenance Depot)
Eglinton Valley, Flats, Rivers	2	Waka Kotahi storage, gravel extraction, dump (various sites SH94), proposed accommodation developments (Path)
Milford Track	1	4 concessions by Tourism Milford covering 2 Private huts, with a pending (guided) day walk loop track build
Hollyford Valley/Track	2	Waka Kotahi storage, gravel extraction, dump (also various sites SH94)
Milford Airport	2	Helipad, hanger and offices, control towers
Lake Manapouri West Arm	1	Petroleum storage
Cascade Creek	1	Waka Kotahi storage, gravel extraction, dump (various sites SH94)
Milford Track (Glade Wharf)	1	Proposed day walk loop track development (Tourism Milford)
Waiau River	1	Golf Course

(from DOC Permissions Database)

3.40 Beyond these 'Recreation' and 'Infrastructure' Concessions were also 'Other' Concessions related to the operations of 2 Coffee Carts at multiple sites.

DOC CAMPSITE DEMAND

3.41 Use of DOC campgrounds in the Milford Corridor has increased rapidly in recent years. Annual combined use of the 8 DOC Conservation Campsites between Te Anau and Milford Sound in 2018-2019 was 400% (45,000) higher than in 2013-2014 (Table 10), Figures 33 and 34).

3.42 All are 'Scenic' Campsites (DOC category) costing $15/night and are open for campervans (lower service standards than Serviced' campgrounds but higher than 'Standard or 'Basic').

3.43 By volume Cascade Creek has had the most increased use (higher by >400%/32,000), with other sites following to varying degrees. It is the last accommodation option before Milford Sound (and often used for those on early boats).

3.44 Strong growth in camping generally and especially Cascade Creek reflects strong growth in independent travel to Milford Sound. While that is the strongly predominant visitor use objective, the travel independence also results in more uses made of the more recently popular Milford Corridor sites not linked to Coach/tour schedule stops (e.g., Lake Gunn Nature Walk; Key Summit; Gertrude Valley/Saddle; Lake Marian).

Table 10: Bed night growth – different DOC campsites

(YE May)	2014	2015	2016	2017	2018	2019	*change 2014-19*	*% change*
Cascade Creek	4,507	8,651	24,876	26,708	35,901	36,745	*32,238*	*715*
Henry Creek	3,802	7,146	11,525	6,918	10,232	10,171	*6,369*	*168*
Deer Flat	211	374	1,955	2,101	3,421	2,940	*2,729*	*1,293*
Totara	627	902	1,300	1,226	1,788	1,833	*1,206*	*192*
Mackay Creek	693	787	1,693	988	1,269	1,342	*649*	*94*
Kiosk Creek	361	620	1,105	1,195	1,412	1,323	*962*	*266*
Upper Eglinton	449	1,023	1,313	1,117	1,338	1,124	*675*	*150*
Walker Creek	187	806	524	470	512	429	*242*	*129*
Total DOC Campsites	10,837	20,309	44,291	40,723	55,873	55,907	*45,070*	*416*

(DOC campsite fee returns)

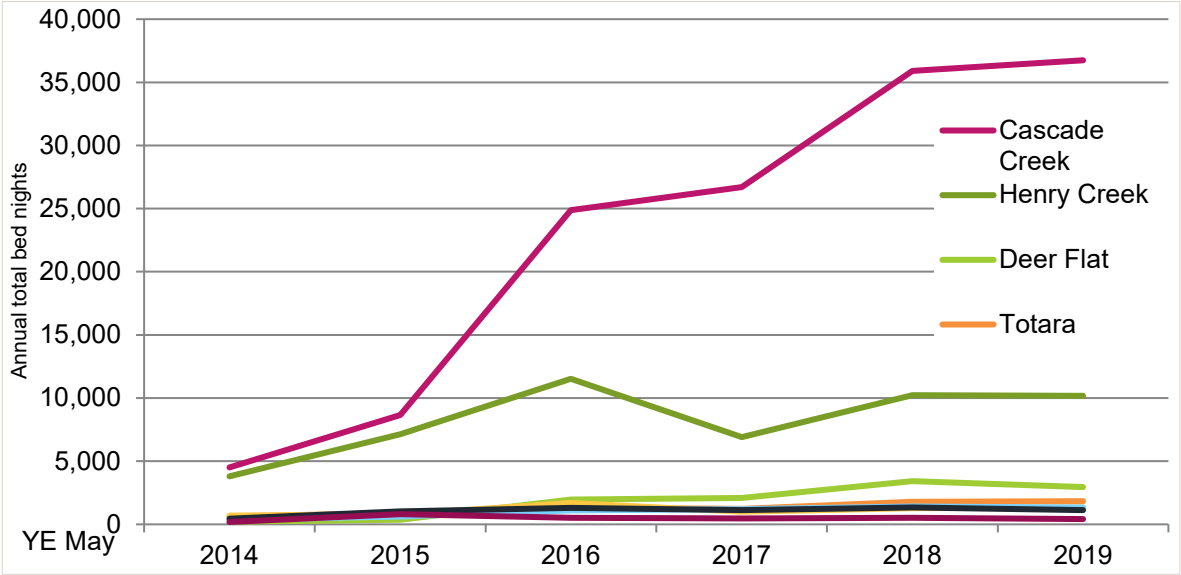

Figure 33: Bed night growth – different DOC Campsites
(DOC campsite fee returns)

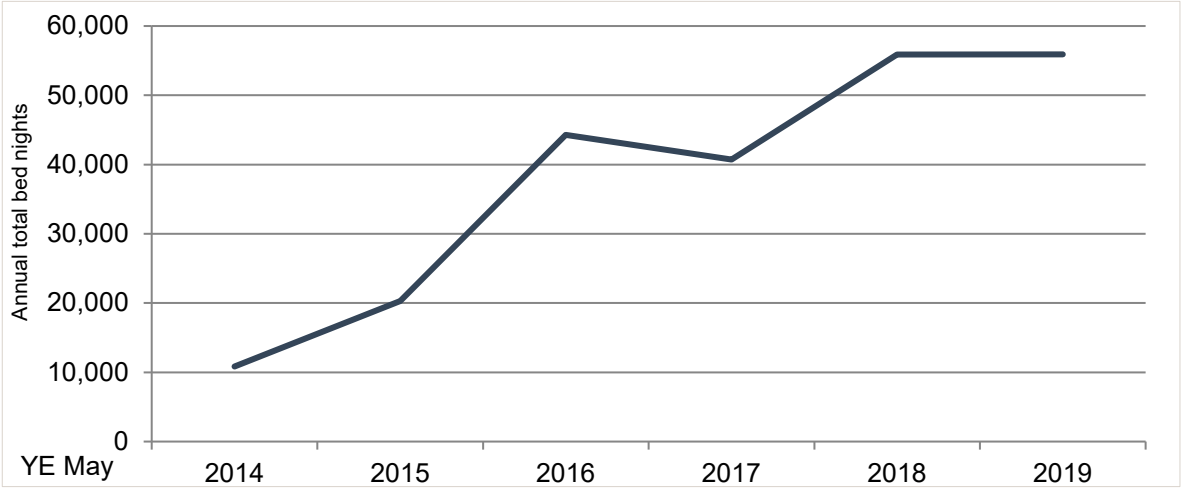

Figure 34: Annual bed night growth – total DOC Campsites
(DOC campsite fee returns)

3.45 Cascade Creek is the largest-capacity campsite and the furthest from Te Anau (closest to Milford), with the remaining lower capacity campsites spotted up the Eglinton Valley towards it (Table 11).

3.46 There are also some non-DOC serviced camping facilities, campervan sites (unpowered) and cabin accommodation available at Knobs Flat (near Kiosk Creek).

Table 11: DOC campsites – Milford Corridor

	Sites	Description
Henry Creek	50	From Te Anau = 25km. Beside Lake Te Anau on small private sites in regenerating beech forest. Campervans OK. Has non-flush toilets (disabled access), drinking water, fireplaces.
Walker Creek	5	From Te Anau = 49km. A small campsite beside the Eglinton River. Campervans OK. Has non-flush toilets, drinking water, fireplaces.
Totara	30	From Te Anau = 53km. Camping area suitable for larger vehicles with sites sheltered by beech forest. Campervans OK. Has non-flush toilets, drinking water, cooking shelter, fireplaces.
Mackay Creek	20	From Te Anau = 53km. A quiet campsite with views of the Eglinton valley, fly fishing in the river and short walks. Campervans OK. Has non-flush toilets, drinking water, fireplaces.
Deer Flat	3	From Te Anau = 62km. Beside the Eglinton River in grass area surrounded by small pockets of beech forest. Campervans OK. Has non-flush toilets, drinking water, cooking shelter, fireplaces.
Kiosk Creek	15	From Te Anau = 65km. A small campsite near Knobs Flat with valley views. Campervans OK. Has non-flush toilets, cooking shelter, fireplaces. Need own drinking water.
Upper Eglinton	5	From Te Anau = 71km. A small camping area near walking and hiking tracks with magnificent valley views. Campervans OK. Has non-flush toilets, drinking water, fireplaces.
Cascade Creek	140	From Te Anau =76km. Good for larger vehicles. Opportunities for fishing and the Lake Gunn nature walk. Last site before Milford Sound. Has non-flush toilets (disabled access), drinking water, cooking shelter, fireplaces.

3.47 Users tend to include a higher proportion of New Zealanders and younger independent travellers than evident for Milford Sound visitors overall.

3.48 **In summary,** use of DOC camping by independent travellers has increased strongly. The focus has been at the spacious and strategically located Cascade Creek campsite. Most are engaged in more extended visits to the area, focussed on a Milford Sound trip, but allowing time for visits to highlighted sites along the Milford Corridor. While relatively small in numbers while engaged in their Milford Sound visits, their numbers represent significant use of the key sites along the Milford Corridor.

DOC VISITOR ACTIVITY COUNTS

3.49 The Department of Conservation has a network of visitor activity counters[12] spread across many visitor sites located on conservation lands. This network is not universal to all sites but is growing from the traditionally high use sites into those seen as potential growth areas, subject to established and anticipated priorities for visitor use management. Because the Department has

[12] In any consideration of counter data, it is essential to note that 'Activity' Counters on tracks record the number of visitor passes made past the respective counters. Counter data do not represent counts of visitor numbers directly, as some track uses may involve a return count where a loop option is not available, and the visitor is counter twice. A supplementary monitoring refinement process termed 'calibration' is required to assess what visitor activity patterns are occurring (typically by field observation or visitor survey) and from that to develop types of correction multipliers to help estimate what actual visitor numbers may be represented by the activity counts. Until such calibrations are made counts are referred to as 'uncalibrated' counts and do not represent visitor numbers specifically. However when viewed as more general activity volume counts, the data do provide viable trend insights (assuming track use patterns have not changed significantly, such as a previous 'in and out' track being reconfigured into a 'loop track' for example). Note that this clarification footnote is also included in the Executive Summary to ensure count data are not misunderstood.

minimal specific visitor facilities at Milford Sound there have been no DOC visitor activity counters operating there, although the majority of visitor numbers can be gauged from concessionaire activity records (see Boat Activity Counts/Aircraft Activity Counts). A visitor activity counter along the Milford waterfront has only been installed in 2019 and insufficient data is available to date.

3.50 While there are visitor activity counters at many of the key sites along the Milford Road Corridor, they have only very recently (2019) been installed at the major short-stop sites of Mirror Lakes and The Chasm. Consequently, no activity count data are yet available for these key short-stop sites. However, visitor activity counters are present at a number of key access sites for daytrips or multi-day trips along the Milford Corridor. There are also visitor activity counters present at some key sites around Te Anau/Manapouri and in the wider region, although they have been only recently installed along the Waiau river (Rainbow Reach Road, Lake2Lake Bike Track) and insufficient data is available to date.

3.51 Overall, the visitor activity counter totals and trends are most applicable to understanding some key experiences and opportunities associated with the Milford Corridor and Te Anau/Manapouri. Overall, there were 38 Visitor Activity Counter data reports reviewed. These cover the most relevant counter sites included due to having sufficient data records and/or project area relevance (e.g., in the Milford Corridor, Te/Anau Manapouri and Wider Western Southland area). Summary data from selected sites are presenting in the following section, with a full data table presented at the section's end.

3.52 Key points are highlighted in summary below before more full presentation (full data table at end of this section).

KEY SUMMARY POINTS

3.53 **For Milford Corridor Area** = growing day use, in some cases very strongly and very recently.

Sites with Data - Key Summit; Gertrude Valley; Lake Marian; and Hollyford Track (road-end), with summary points being:

- strong growth in visitor use of Gertrude valley over the last 10 years, indicative of recent 'discovery' of the opportunity by the more 'mass independent traveller market'.
- very strong growth in visitor use of Lake Marian over the last 5 years, indicative of very recent 'discovery' of the opportunity by the more 'mass independent traveller market'.
- initial high growth for Key Summit but relatively static in more recent years, with some connection to backcountry tramping route networks to the south.
- slight growth for the Routeburn Track and the Hollyford Track, but at much lower volumes.
- an increasing interest in part-day/full day opportunities along the Milford Corridor as stand-alone experiences (not necessarily linked to undertaking experiences in Milford Sound Piopiotahi).

3.54 **For Te Anau Area** = some strongly increasing day uses

Sites with Data - Te Anau Visitor Centre; Kepler Track (Brod Bay/Luxmore and Rainbow Reach), with summary points being:

- consistent visitor volumes but some decline (relative to overall tourism growth) for Te Anau Visitor Centre.
- increased visitor volumes for the Kepler Track overall and for day-use to Brod Bay (strong growth) and further toward Luxmore Hut.

3.55 **For Western Southland/'Southern Scenic Route' Area** = lower activity, some declines

Sites with Data - Lake Monowai Lookout Track; Borland Nature Track; Rarakau Roadend-Breakneck River; Tuatapere Domain Tracks; Round Hill Walking Track; Dean Forest, Big Totara Track, with summary points being:

- Mavora Lakes North Access Road has new counter – with solid volumes in the last 2 years.
- steady growth on the Lake Monowai Lookout and Rarakau Roadend (access to Hump Track)
- Borland Nature Track volumes have been static (but with interesting network enhancement possibilities known mainly only to locals); slight declines on tracks elsewhere.
- opportunities to investigate potential new and/or enhanced old visitor route connections/ networks between Borland, Doubtful Sound and Lake Manapouri in particular.

MILFORD CORRIDOR - KEY SUMMIT/ROUTEBURN

3.56 Key Summit is an outstanding and achievable scenic highlight. It is accessed from the last section of the Routeburn track (most commonly completed at the Divide) and while many Routeburn (or Greenstone) walkers may take the side trip to reach the spectacular Key Summit, their activity volumes are dwarfed by day-visitors from the Divide (Figure 35).

3.57 Activity volumes have shown net increase over the last 10 years, although 8 of the 10 highest count days over the last 10 years were in the 2014-15 summer season and little recent growth is apparent.

3.58 The much smaller visitor volumes travelling the ridgeline from Key Summit towards the backcountry tramping networks to the south (e.g., Boyd Creek, East Eglinton, Annear Creek Upper Upukerora, Mavora Lakes etc) remained largely static. These areas do represent potential tramping development opportunities in the area.

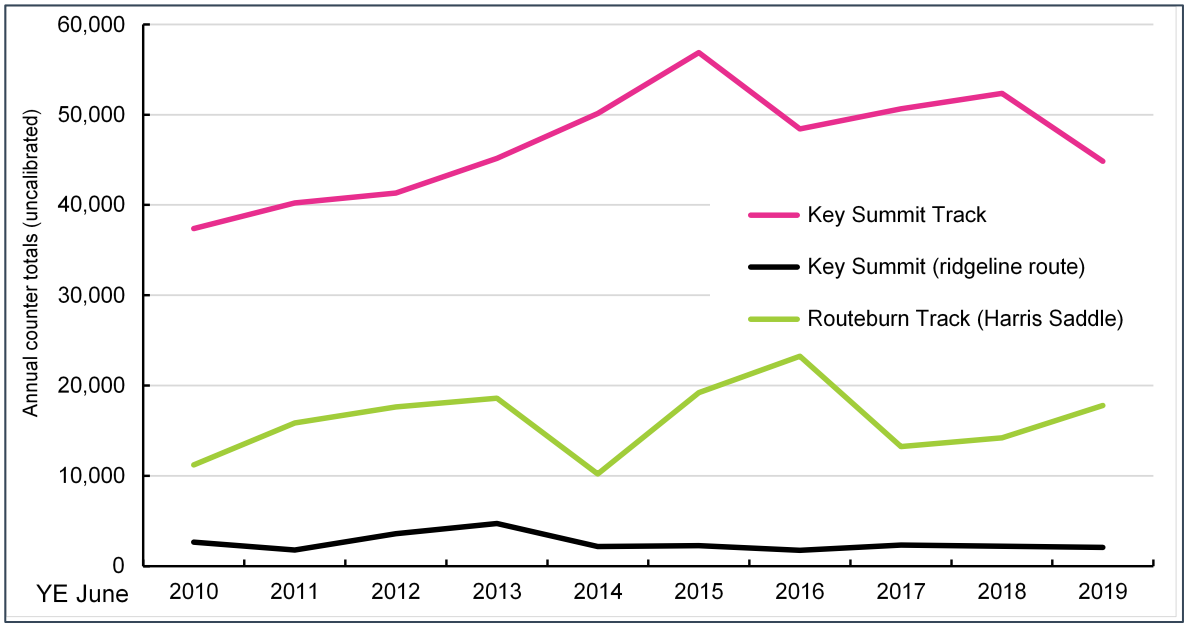

Figure 35: DOC Counter records (10yrs): Key Summit

3.59 Looking at the average daily pattern of count records (overleaf) a strong peak of use between 11am-4pm is evident during the peak-season month of January. By contrast the use levels are vastly lower in the winter off-season month of July, with a similar focus are early afternoon (Figure 36). Given trips take around 3 hours walking time return from the Divide, plus time exploring on top, most trips would start early morning and finish late afternoon – basically representing a full day trip by the time travel to and from the Divide or departure from Mackenzie or Howden Huts on the Routeburn/Greenstone is allowed for.

3.60 Trips of these durations would very rarely be associated with any same day Milford Sound Piopiotahi visit, but more likely with side trips by Routeburn walkers; or day trips from Te Anau or by Eglinton Valley campers.

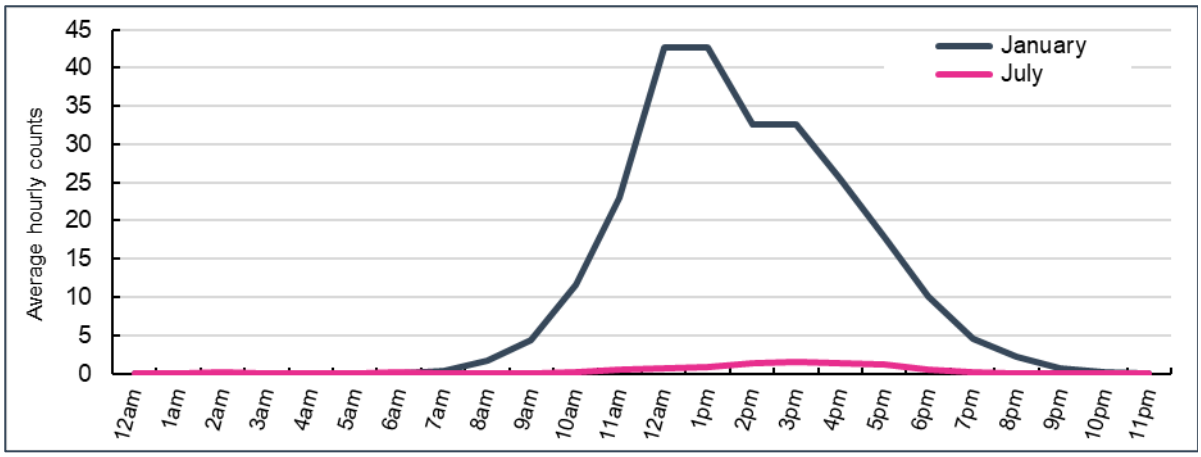

Figure 36: Daily Visitor Activity Counts/hr: Key Summit

MILFORD CORRIDOR - GERTRUDE VALLEY

3.61 There has been sustained strong growth in use made of the Gertrude Valley Track over the last 10 years (by over 250% in the last 10 years), (Figure 37). The scenic hanging valley starts adjacent to Homer Tunnel and involves a valley walk and the option of a steep and sometimes very exposed climb to the spectacular Gertrude Saddle.

3.62 Along with Key Summit, Gertrude Saddle is an outstanding but reasonably achievable scenic wonder, although is more subject to fitness, experience, weather and risk from steep terrain.

3.63 Known for many years by climbers, the experience was only 'discovered' more recently by wider travellers through social media and related guide sources around 7-8 years ago. Despite its relative difficulty the growth in its use has been rapid and recently increased in rate. The 10 highest activity count days over the last 10 years were in the 2018-19 summer season.

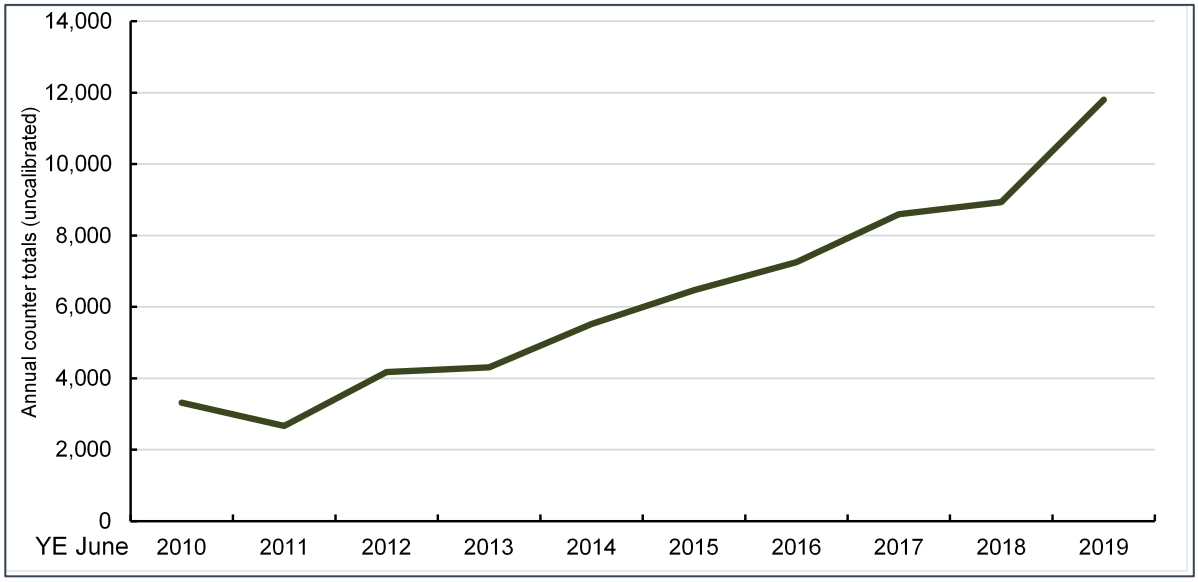

Figure 37: DOC Counter records (10yrs): Gertrude Valley

3.64 Looking at the average daily pattern of count records (Figure 38), a strong peak of use between 11am-4pm is evident during the peak-season month of January. By contrast the use levels are virtually nil in the winter off-season month of July.

3.65 Given trips take around 4-6 hours walking time return, plus time exploring on top, most trips would start early morning and finish late afternoon – basically representing a day trip (by the time travel to and from the valley is allowed for).

3.66 Trips of these durations would very rarely be associated with any same day Milford visit, but more likely with day trips from Te Anau, Eglinton Valley campers or by climbers staying at Homer hut in the Valley.

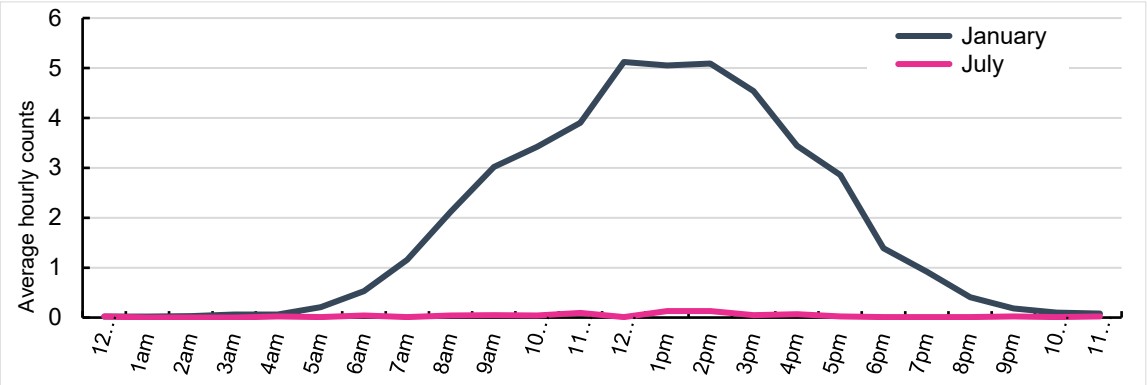

Figure 38: Av. Daily Visitor Activity Counts/hr: Gertrude Valley

MILFORD CORRIDOR - LAKE MARIAN (HOLLYFORD)

3.67 There has been very recently accelerated growth in use of the Lake Marian Track by around 300% in the last 5 years (Figure 39). The Lake Marian track is located a short distance past the Hollyford Road turnoff from the Milford Highway. The track begins across a scenic swing bridge and initially goes a short distance to a waterfall attraction (20min return). This represents the easier, more developed, and more used lower section of the track. The full track continues steeply to the spectacular hanging valley holding Lake Marian and is generally around a 3-hour (return) walk), plus time exploring.

3.68 Its rapid recent use growth indicates it has only recently been 'discovered' by wider travellers through social media and related guide sources (as Gertrude Valley was a few earlier). While its use has grown, that of the Hollyford Track starting around 20km further down at the road end has only grown around 30% in last 10 year.

3.69 The rapid recent increase in growth both here and for Gertrude Saddle suggests there may be considerable 'latent demand' for similar activity opportunities the Milford Corridor visitor market as the visitor market becomes aware of them.

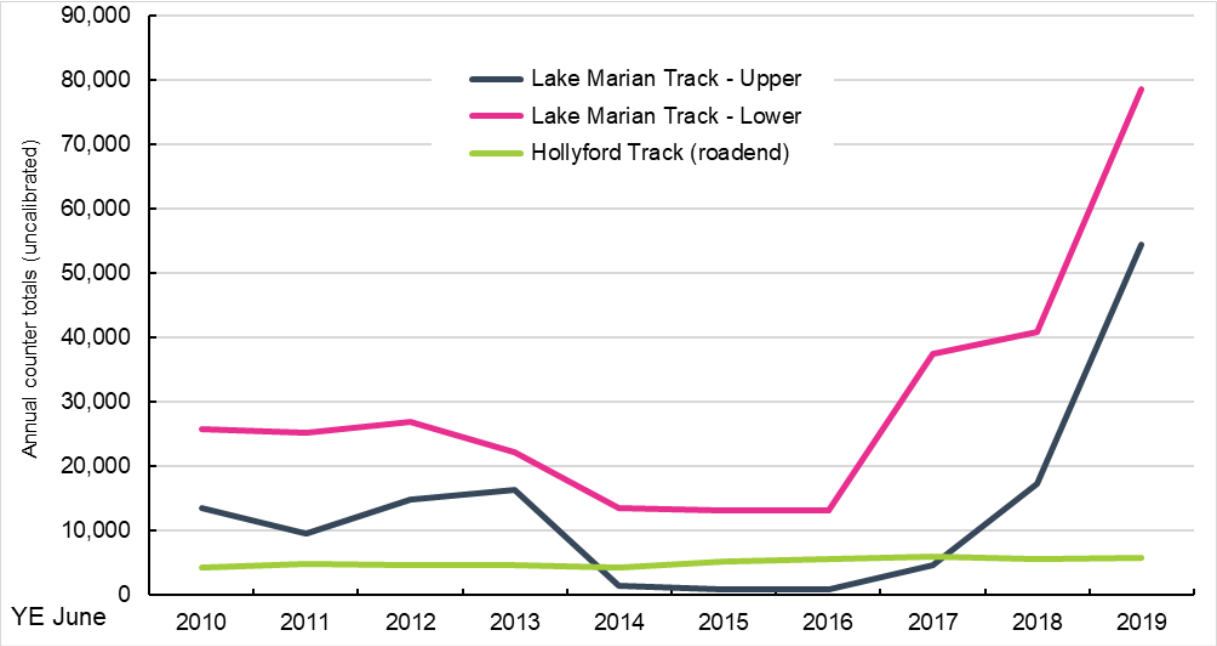

Figure 39: Av. DOC Counter records (10yrs): Lake Marian

3.70 Looking at the average daily pattern of activity count records (Figure 40), a strong peak of use is evident between 11am-5pm during the peak-season month of January. By contrast the use levels are much lower in the winter off-season month of July.

3.71 Given trips to the Lake take at least around 3 hours walking time return, plus time exploring around the lake, most trips would start early morning and finish late afternoon – basically representing a day trip (by the time travel to and from the track is allowed for). These trips would very rarely be associated with any same day Milford visit.

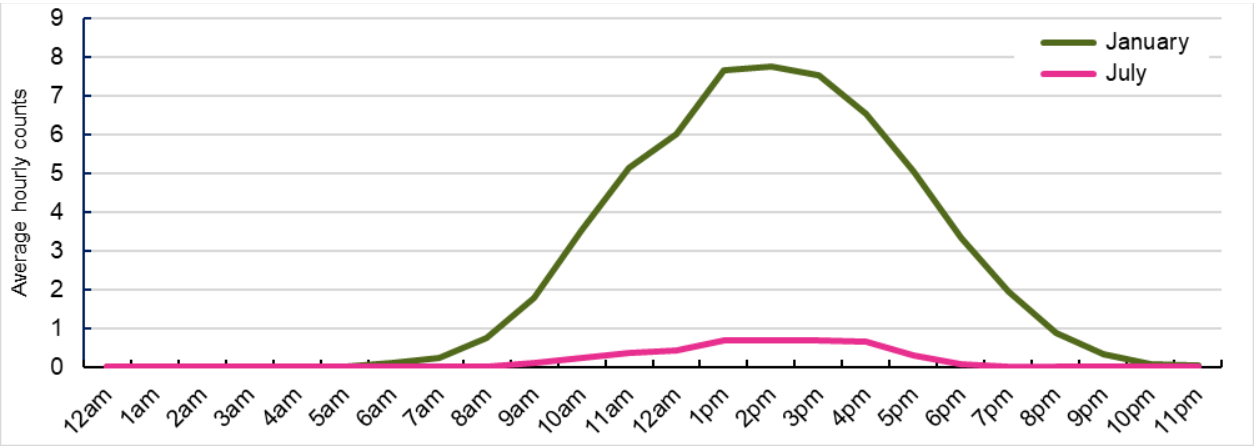

Figure 40: Av. Daily Visitor Activity Counts/hr: Lake Marian

TE ANAU AREA – VISITOR CENTRE

3.72 There appears to have been an overall decline in visitor activity over the last 10 years. However, most of this decline occurred after an exceptionally high spike in visitor activity counts during March and April of YE June 2010. Other YE 2010 monthly counts before and after March/April remained largely consistent with those found in all subsequent years (Figure 41).

3.73 If YE Jun 2010 could be considered an exceptional outlier year (....), visitor numbers have actually appeared relatively stable over the last 9 years. However, during this same period, the overall visitor numbers passing through Te Anau to Milford have shown clear increase, suggesting market share at the Visitor Centre has declined in relative terms. There are numerous potential

reasons for this decline including more visitors getting information from online sources (such as the Departments own website) and the fact that the visitor centre appearing dated (in terms of interpretive material) and of less interest to visitors.

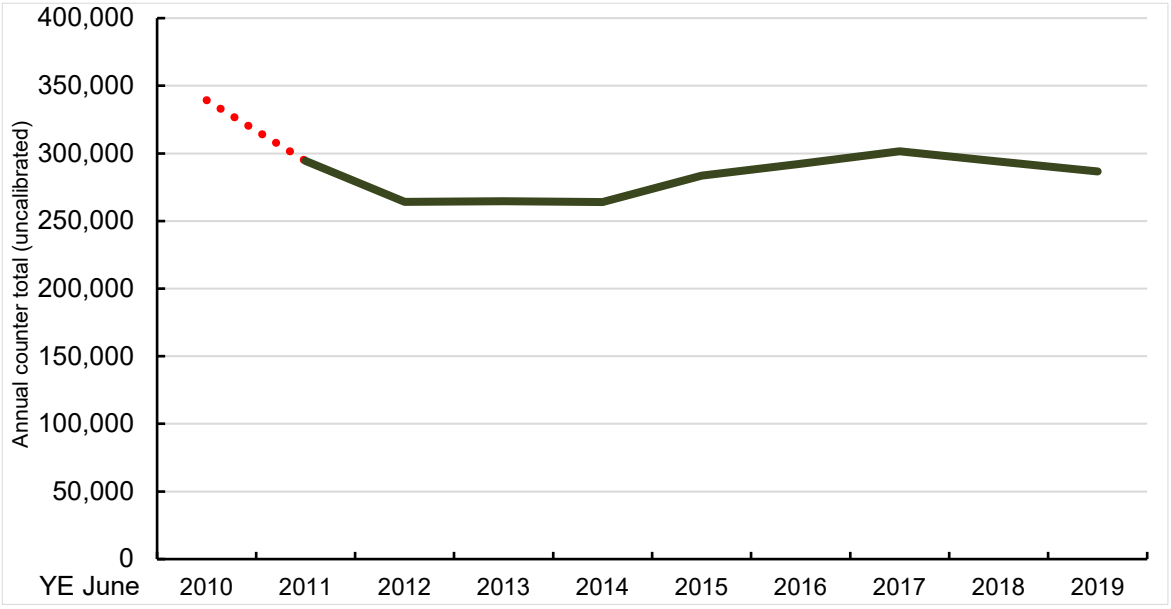

Figure 41: DOC Counter records (10yrs): Te Anau VC (DOC)

3.74 Looking at the average daily pattern of activity count records a strong sustained peak of use is evident between 9am-4pm during the peak-season month of January (Figure 42). By contrast the use levels are much lower in the winter off-season month of July although they appear to follow a similar pattern. Use patterns suggest a largely steady stream of visitors all day, dipping only a little around lunch hours. These patterns suggest a steady number of both Te Anau overnight or multi-night visitors actively seeking information about things to do and / or seeking interpretive / educational experiences within the visitor centre.

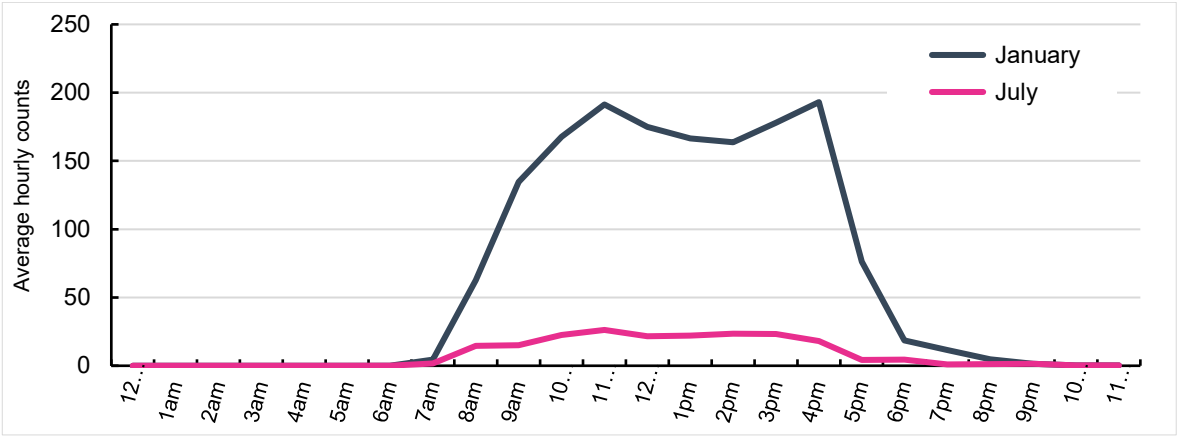

Figure 42: Av. Daily Visitor Activity Counts/hr: Te Anau VC (DOC)

TE ANAU AREA – BROD BAY/KEPLER TRACK/WAIAU RIVER

3.75 Strong growth over the last 10 years is apparent in day-use of the first section of the Kepler Track from the Control Gates (usual Kepler start) to Brod Bay (even accounting for return day-use), (Figure 43).

3.76 From the next section from Brod Bay up to Luxmore Huts there is a significant drop-in activity counts with fewer day users climbing for the views around Luxmore Hut.

3.77 Activity Counts along the usual last section of the Kepler Track from Waiau River (Rainbow Reach) to the Control Gates (usual finish) are much lower (largely representing full Kepler Track Walkers). They too show a steady increase in use.

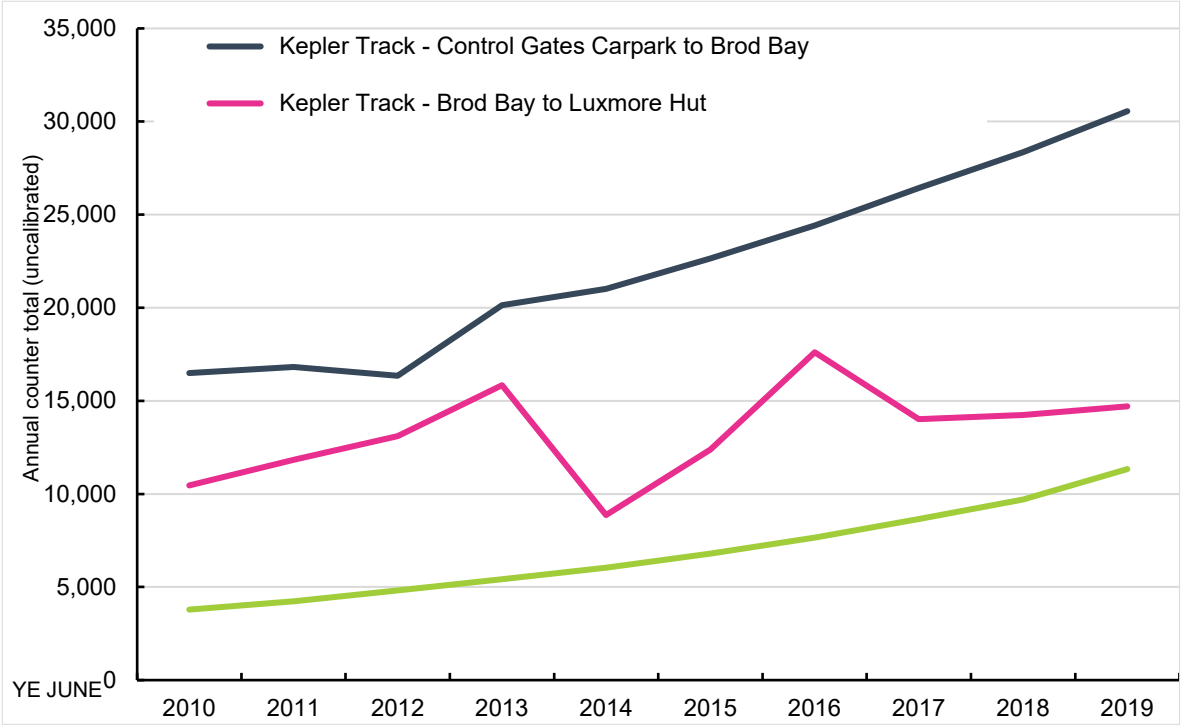

Figure 43: DOC Counter records (10yrs): Brod Bay/Kepler/Waiau

3.78 Overall, these results show steady growth in Kepler Track use and stronger growth in Te Anau-based day uses to Brod Bay (and towards Luxmore Hut). This also indicates growing interest in such experiences where they become available and known. Figures up to/including February 2020 before any impacts from COVID19 were evident showed use to Brod Bay had been tracking significantly higher for 2019/2020 than in all previous years.

3.79 Looking at the average daily pattern of count records Figure 3.12 shows an asymmetric pattern of a high jump in counts from 8-10am as people start their day (e.g., Brod Bay/Luxmore day trips or Kepler walkers) and a slower reduction over the afternoon (as Brod Bay Luxmore day-trippers return).

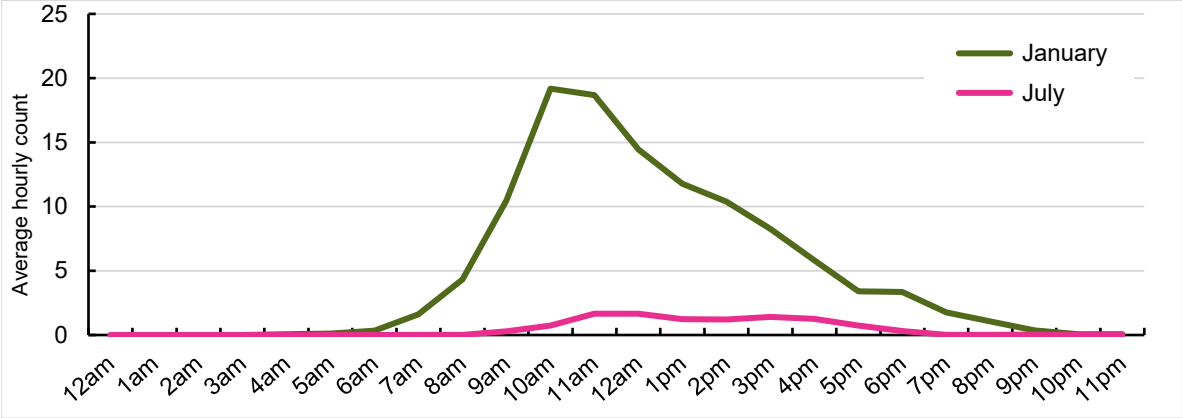

Figure 44: Av. Daily Visitor Activity Counts/hr: Brod Bay

WESTERN SOUTHLAND/'SOUTHERN SCENIC ROUTE' AREA

3.80 Visitor activity counts were also included from a range of monitored DOC tracks in Southeast Fiordland and Western Southland along the 'Southern Scenic Route' area (Figure 45).

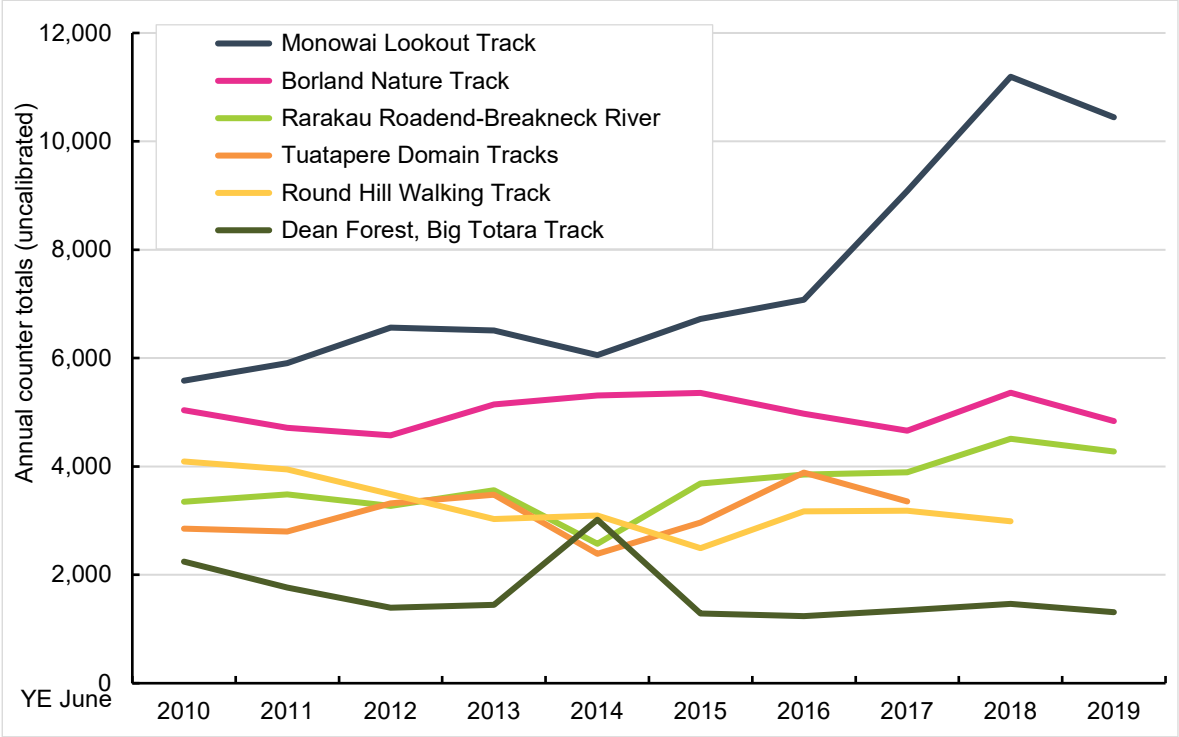

Figure 45: DOC Counter records (10yrs): Southern Scenic Route

3.81 Strong growth over the last 10 years for numbers counted the Lake Monowai Lookout Track (a short walk). The Borland Nature Trail on the Borland Road near Monowai had largely static numbers (at lower levels), along with most of the other monitored tracks in Western Southland and Southeast Fiordland).

3.82 Slight increase was apparent for the Rarakau Roadend track (Breakneck River), which is the start for the South Coast Track. This follows the South Coast along the bottom of Fiordland National Park, giving to access to the Hump Ridge Track - which will be DOC's next designated Great Walk.

3.83 A visitor activity counter was located on the Dusky Track at Upper Spey Small, but had no available data.

3.84 Most of these tracks are of interest to the wider scope of recreational opportunity development that could be considered in the Milford Opportunities project as they represent possible satellite development areas for new visitor experiences. These are noted in high-level summary below:

1. Lakes Monowai and Hauroko are accessible by vehicle and have many boat and backcountry track-based opportunities for new experiences and network connections (potentially linking through north to Lake Manapouri).

2. The Borland Burn near Monowai township has an old hydro-station lines support road through wilderness all the way to the South Arm of Lake Manapouri which is currently used occasionally by 4WD vehicles and mountain bikes and as a maintenance access road. A branch of the road almost connects over Percy Saddle (often done by mountain bikes via a challenging 1km portage section), to a road section on the other side leading to West Arm, Lake Manapouri, which in turns gives foot access to the Dusky Track and road access over Wilmot Pass to Doubtful Sound. The route over Wilmot Pass via West Arm (accessed by water

taxi across Lake Manapouri) is that used by shuttle coaches for delivering passengers to the Doubtful Sound boat cruises etc.

3. The Rarakau Roadend track at Breakneck River gives access to the South Coast Track/Hump track.

4. The Round Hill Track (which forms part of the Te Araroa trail) is located on the Southland Coast goes through old goldmining areas with significant heritage value for the significant Chinese Goldmining activity and settlement that was there.

VISITOR ACTIVITY COUNTER DATA SUMMARY

3.85 A summary data table of all Department of Conservation visitor activity counter records referred to in the preceding section is included for reference (Table 12). It shows both the visitor activity count changes over the last 10 years and the percentage changes these represent.

3.86 These activity counter figures appear to reflect a general growth trend use levels and interest in stand-alone day-use activities along the Milford Corridor and around Te Anau. Data were not available for Mirror Lakes, the Chasm or Milford foreshore but anecdotal accounts suggest all have featured heavy and growing use. This general trend may represent an added growth opportunity in drawing more visitors to the area and on longer stays.

3.87 Most significant visitor activity growth has been associated with day use of the Lake Marian Track, with the rate accelerating markedly in the last 3-4 few years. Growth on the Gertrude Valley/Saddle track began earlier but had been accelerating in the last year. In both cases there seems to have been some sort of latent demand for such types of day-use activities among independent visitors, with social media information possibly triggering sudden rapid growth into new areas. Key Summit has maintained its high use levels over the 10 year period. Around Te Anau the day use activities associated with Brod Bay in particular have also appeared to increase strongly.

3.88 Modest increases in use of the Lake Monowai Lookout Track also suggest that release of this apparent latent demand may not necessarily be limited to sites immediately around Te Anau or the Milford Corridor, although use of monitored DOC sites elsewhere were not prominent to date. Slight increase was apparent for the Rarakau Roadend track (Breakneck River), which is the start for the South Coast Track that in turn gives to access to the Hump Track - which will be DOC's next designated Great Walk (and use increases can be anticipated as a result). Opportunities associated with areas around the Borland Road in particular appear to warrant more specific attention[13].

[13] Future Destination Opportunities

Although the Master Plan is focused on Te Anau, the Milford Road Corridor and Milford Sound Piopiotahi, it is likely to be a catalyst for growth in other nearby related areas. Considerable scope exists to develop other complementary destinations and experiences, especially in nearby areas of Fiordland south of Te Anau and Manapouri.

For example, in the Manapouri/Hope arm area as there is an opportunity to create several day or overnight walks utilising largely existing hut and track infrastructure. Scope also exists to explore current or new experience opportunities associated with areas such as Doubtful Sound; the South and West Arms of Lake Manapouri; the Borland Road; Lakes Monowai and Hauroko; the Hump Ridge Track etc.

These future destinations should not be developed ways that simply duplicates what is on offer in areas such as Milford Sound Piopiotahi, but rather builds on their own unique settings and opportunities. It is important that regionally a strategic spectrum of setting-appropriate visitor and recreational experiences are available (or enhanced) to match an increasing diversity of visitor interests in natural outdoor experiences. This is likely to require a strategic planned approach complementing the Master Plan which identifies and assesses potential opportunities and includes allowances for both strategic developments in some areas and limitations to developments in other areas (as appropriate to the predominantly National Park settings and their environmental and visitor-experience conservation priorities).

Table 12: DOC Visitor Activity Counter Records (10yr)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	change 10* years	% change
Milford Corridor Area												
Lake Marian Track - Lower	25,747	25,267	27,012	22,121	13,551	13,104	13,206	37,418	40,918	78,531	***52,784***	***205***
Lake Marian Track - Upper	13,597	9,644	14,899	16,296	1,530	950	912	4,695	17,240	54,542	***40,945***	***301***
Key Summit Track/Nature Walk	37,374	40,208	41,317	45,164	50,136	56,882	48,416	50,653	52,351	44,854	***7,480***	***20***
Routeburn, Harris Saddle	11,194	15,839	17,634	18,611	10,205	19,206	23,236	13,252	14,224	17,778	***6,584***	***59***
Gertrude Valley Track	3,315	2,668	4,173	4,310	5,516	6,465	7,252	8,598	8,933	11,805	***8,490***	***256***
Hollyford track (road end)	4,282	4,775	4,721	4,699	4,250	5,208	5,619	6,052	5,662	5,713	***1,431***	***33***
Greenstone Track, McKellar Hut*	nd.	3,577	3,447	2,537	879	1,100	1,664	1,768	2,363	2,256	***-1,321***	***-37***
Key Summit (ridge route)	2,650	1,797	3,575	4,722	2,182	2,266	1,736	2,325	2,194	2,076	***-574***	***-22***
Te Anau/Manapouri Area												
Te Anau Visitor Centre	339,350	294,429	264,171	264,621	264,014	283,483	292,250	301,531	293,874	286,540	***-52,810***	***-16***
Kepler Track, Control Gates to Brod Bay	16,494	16,817	16,345	20,143	21,007	22,640	24,416	26,437	28,350	30,555	***14,061***	***85***
Kepler Track, Brod Bay to Luxmore	10,463	11,825	13,111	15,845	8,865	12,385	17,607	14,009	14,231	14,696	***4,233***	***40***
Kepler Track, Waiau River	3,788	4,236	4,815	5,416	6,041	6,799	7,657	8,650	9,697	11,334	***7,546***	***199***
Pearl Harbour-Back Valley Track (Manapouri)	2,049	1,931	1,820	1,726	1,616	1,523	1,436	1,361	1,275	1,366	***-683***	***-33***
The Monument Track (Manapouri)	429	425	428	472	506	544	586	633	678	610	***181***	***42***
W Southland/'Southern Scenic Route' Area												
Mavora Lakes North Access Road*	nd.	nd.	nd.	nd.	nd.	nd.	nd.	nd.	18,461	18,890	n/a	n/a
Monowai Lookout Track	5,583	5,909	6,562	6,511	6,053	6,720	7,075	9,085	11,192	10,446	***4,863***	***87***
Borland Nature Track	5,038	4,711	4,574	5,144	5,308	5,355	4,976	4,662	5,361	4,838	***-200***	***-4***
Rarakau Roadend-Breakneck River	3,349	3,487	3,273	3,564	2,573	3,686	3,849	3,891	4,511	4,278	***929***	***28***
Tuatapere Domain Tracks*	2,855	2,802	3,319	3,479	2,388	2,965	3,887	3,353	nd.	nd.	***498***	***17***
Round Hill Walking Track*	4,092	3,946	3,492	3,031	3,097	2,492	3,173	3,186	2,989	nd.	***-1,103***	***-27***
Dean Forest, Big Totara Track	2,244	1,764	1,391	1,447	3,017	1,286	1,238	1,347	1,467	1,313	***-931***	***-41***

4 VISITORS, EXPERIENCES AND EVALUATIONS

4.1 The featured components of visitor experiences and their positive and negative evaluations across the project areas[14] were reviewed from two main sources:

1. 29 previous visitor-experience research reports conducted in the project area15

2. Online reviews16 by users covering around 100 relevant site/activity/provider experiences in the wider project areas and 1000 reviews specifically for Milford Sound visits.

4.2 Key insights from both sources are summarised here. The full source material is documented and available separately as required. Results are based on survey respondents across a variety of projects, and on those submitting experience reviews across a wide variety of relevant site/ activity/ provider experiences, so may not be fully representative of all uses and users.

REVIEW OF RESEARCH REPORTS – KEY POINTS

VISITOR EXPERIENCE EVALUATIONS AND FEATURES

4.3 The primary finding from reviewing a range of visitor experience research projects and visitor experience reviews related to activities undertaken in these areas was that virtually all visitors to all sites had strongly positive overall visitor experience outcomes.

4.4 Secondly these positive visitor experience outcomes were largely sustained at high levels despite notable negative experience components featuring in experience reporting in some situations.

4.5 From here for clarity and consistency we use the phrases:

3. ‘Overall Experience Evaluations’ to refer to such overall visitor experience outcomes.

4. ‘Positive/Negative Experience Features’ to refer to the variety of positive and negative elements within different experiences.

4.6 Among the very consistently high Overall Experience Evaluations across virtually all research and review contexts, some visitor responses typically expressed one or a combination of specific **Positive** Experience Features, most often related to: one or a combination of:

- scenery, views, natural experiences of environment/wildlife – clearly representing the most strongly positive component, and/or

- examples of care, consideration, and authenticity in provider service delivery, and/or to lesser extents:

  - facility/service provision and standards appropriate to respective setting and experience expectations, and/or

  - positive social interactions with others, and/or

  - successfully undertaking and completing an activity (often as something new and/or challenging in some way)

[14] Comprising Milford Sound Piopiotahi, the Milford Road Corridor, and the Te Anau area/ Wider Fiordland (where available), with virtually all Milford Sound Piopiotahi visitors coming on day trips for boat cruises.

[15] See Section ‘11 REFERENCES’ for sources. Note that all of these reports used sample selections at different sites and activity contexts to collect their base data, and none could be fully representative of all visitor characteristics or responses, but collectively they do indicate some common themes.

[16] Mainly from Trip Advisor reviews, and some from the New Zealand ‘Rankers’ site.

4.7 Among the consistently high Overall Experience Evaluations across virtually all research and review contexts, a usually only small proportion of visitor responses also expressed one or a combination of specific **Negative** Experience Features[17], most often related to one or some combination of:

- external intrusions compromising components of expected experiences, most typically aircraft/aircraft noise or to a lesser extent associated with the numbers and/or behaviours of other visitors (usually associated with either a preference for fewer others in experiences in general, or in some cases to related specific physical behaviours/ inconveniences).[18]
- examples of inadequate or negative care, consideration, appropriateness and/or authenticity in provider service delivery, and/or
- natural environmental conditions (e.g., weather, sandflies)

4.8 It is important to reiterate that highly positive Overall Experience Evaluations were predominantly sustained even in the presence of clear Negative Experience Features in some particular visitor experience settings[19].

4.9 From in-depth analysis of over 1000 Milford Sound visitor reviews from Trip Advisor[20] the main overarching theme of the small proportion (13%) of negative Overall Experience Evaluations identified[21] was that site and visit expectations had not been met. This lack of fulfilment most often related to expectations of 'experientially more' from the visit experience given the site's high-profile marketing and reputation. These sentiments were often associated with references to other 'better' places. Smaller proportions of responses also referred to various combinations of long travel journey's; bad weather; facility and/or service issues; social crowding/conflict issues or behaviours; or activities considered inappropriate or disturbing (e.g., traffic, aircraft). Many noted that components of the Milford Road journey/scenery experience were better.

4.10 Positive Experience Features commonly featured within many of these negative Overall Experience Evaluations included scenery at Milford; the scenery and experiences along the Milford highway; wildlife encounters; waterfalls and small groups/vessels.

4.11 Workers based at Milford Sound Piopiotahi and Private Boaties had generally higher visitor activity impact perceptions, more negative facility evaluations, and more negative information quality evaluations compared with recreational/tourist visitors overall (Booth 2010).

4.12 Overall, New Zealanders and International visitors had broadly similar perceptions and preferences, although New Zealanders were generally more present among the more active and/or backcountry-type recreationists (e.g., kayakers, climbers, trampers etc), who were generally more impact sensitive (Booth 2010).

4.13 Potential priority improvements and things preferred to stay the same forever as suggested by Milford Sound Piopiotahi visitor survey respondents (Booth 2010) emphasised a high value on natural scenery and landscapes, and desires for things to stay the same and for commercial development to be minimised. Other secondary improvement themes that emerged related to aircraft controls, improved information and interpretation, and various infrastructure / facility improvements (particularly emphasised by Milford residents (staff).

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[17] In the most recent published research on Milford Sound/Piopiotahi visitors from the University of Otago Gnoth (2017, 2019) used the term 'nuisance' referring to a 4-item index of negative responses. The focus of this work was developing an understanding of 'crowding' perceptions at the site.

[18] Note that such negative external factors were not expressed at high levels overall, being only more notable in certain situations (e.g., particular survey areas, respondent groups). In the most recent published research Gnoth 2017, 2019 used the term 'nuisance' referring to a 4-item index of negative responses.

[19] As explored most extensively in the Milford Sound /Piopiotahi user monitor research by Booth (2010) and addressed in different levels and contexts across many of the other 29 research reports reviewed.

[20] Refer to later points 3.24-3.47 for more full findings from two overall review summary proceses

[21] As indicated by experience rating scores of 1-3 in a 5-point scale (where 5=excellent))

RESPONDENT PROFILE FEATURES

4.14 There was an even gender balance, except for the most backcountry experiences/settings (e.g. 75% male, Homer Hut/Darran Mountains users, Oyston 2010b)

4.15 There was a predominance of 20-39 year olds overall, with younger ages notably more prominent in specific activity or site settings requiring more physical activity/fitness (e.g., kayaking, day walks etc), with the Lake Gunn Nature Walk the main exception (33%>50yrs, DOC 2019c). A notably higher 'youthful' proportion (54%) aged 20-29 at Deepwater Basin (DOC 2019a) where kayaking was the main activity being done.

4.16 There was a predominance of international visitors (typically around 90%), with exceptions of higher NZ % proportions among Private Boaties (82%, Booth 2010) and Homer Hut/Darran Mountains users (61%, Oyston 2010b), and to a lesser extent among Key Summit users (21%, DOC 2019b) and Deepwater Basin users (19%, DOC 2019a).

4.17 Virtually all visitors were first timers (>90%), with the highest repeat visitor exceptions being among Private Boaties (80%, Booth 2010); Hunters, Climbers and Trampers (55%, Booth 2010); Homer Hut/Darran Mountain users (52%, Oyston 2010b) and Deepwater Basin users (32%, DOC 2019a)

VISITOR TRIP FEATURES

4.18 Most Milford Road Corridor site visitors used Private/rental Car (mostly 50-60%) followed by Campervans/RVs (mostly 20-30%) and Shuttle/Bus/Coach (10-20%). Campervan use was higher among those using Lake Gunn, DOC Campsites and other Short Walks along the Milford Road Corridor. Car use was highest among Private Boaties.

4.19 Self-Drive/Coach Choice. Specific investigation of travel mode preferences to Milford Sound was undertaken for Waka Kotahi (University of Otago 2019). The 271 respondents were split evenly between their choice of self-driver (83% rentals) and bus user modes. Summarising some key results:

- Both groups were 90% international, had similar age-profiles, although there was a higher Asian proportion among bus users.
- Around half (50%) of self-driver had a Te Anau travel base (50%), while most (80%) bus users based at Queenstown.
- In terms of their top-5 reasons for choosing self-drive or bus modes (rated sequentially from the 17 listed):
  - Self-drivers favoured flexibility, convenience, freedom, accessibility, and ease of use.
  - Coach users favoured safety, convenience, reliability, value for money and ease of use.
- Before travelling, visitors were primarily interested in understanding factors such as the distance and amount of time to reach Milford Sound. A high focus was also placed on discovering the attractions available along Milford Road. Visitors tended not to investigate the parking facilities in Milford Sound, the amount of traffic on the Milford Road, or safety information.
- The Milford Road positively exceeded visitor expectations on features such as its length and perceived difficulty (better than expected), and visitor responses indicated they did not negatively perceive the amount of traffic and parking at Milford at notable levels.
- There was high visitor satisfaction with chosen mode of transport across a range of attributes and a high propensity to recommend or repeat their chosen mode again in the future (few indicated much support for voluntary change of mode, although some were open to shuttle use subject to some incentives).
- The executive summary (p1) concluded that:

- "*Following the results from the data, it is apparent that visitors will hesitate to exchange their car and take a bus without the appropriate encouragement to do so. Car users are inherently different from those who choose to take a bus. Therefore, it is essential to consider a push strategy within a transportation strategy, which may utilise downstream measures employed in National Parks worldwide, such as a public transport shuttle network, restrictions on private vehicle usage, reservation systems for private vehicles, and entry costs to the Milford Road*".

4.20 The trip planning horizon for Milford Corridor site visitors was predominantly 2+ months for sites/ activities/ experiences requiring booking, while use of sites/activities/experiences such as short-walks or scenic day walks were more often quite spontaneous, with most planning being done less than a 1-2 days before or same-day (except if participation was based on booked services). Use of accommodation was an exception with very much longer trip planning horizons being applied.

4.21 Most visitors did short stops/walks etc along the Milford Road Corridor as part of whatever primary experience they were targeting (sometimes these Corridor experiences were the targets or key add-on components to longer area stays – e.g., Key Summit, Gertrude Valley. Lake Marian)

4.22 Word of Mouth from Family/Friends was the largest individual information source overall, with various degrees of usually secondary use from DOC (and other) websites, guidebooks and social media. The main variation was low Word of Mouth for Lake Gunn and Milford Corridor Camping sites (which featured high 'Campermate' App use)

4.23 There was low use of Visitor Centres overall.

ANALYSIS OF VISITOR EXPERIENCE REVIEWS – KEY POINTS

4.24 Visitor experience reviews were used as a resource of targeted content for assessing additional Overall Experience Evaluation perspectives and for summarising key Positive/Negative Experience Features.

4.25 Most review content was drawn from the substantial TripAdvisor review source, with reviews from the New Zealand review source 'Rankers' providing small supplementary review content.

4.26 Sites/ activities/ experiences in the Fiordland study area that were covered by sufficient review content were identified and content investigated. In total there were 96 specific individual review sites covered. Two analysis and summary processes have been applied:

1. Primary Scan - Multiple Experience Reviews Overview –high-level 'main theme' sample analyses across all 96 review sites covering multiple sites/ activities/ experiences associated with the Fiordland study areas (by quick scanning up to 100 individual reviews per site to identify and then reconfirm main themes)

2. In-Depth Reviews Analysis - Milford specific – an in-depth positive/negative feature evaluative analysis of targeted overall Milford Sound Piopiotahi visit reviews using many more reviews and more specific in-depth response coding. Over 1000 reviews of the overall Milford Sound visit experiences were investigated.

PRIMARY SCAN - MULTIPLE EXPERIENCE REVIEWS

4.27 The numbers of reviews and main categories included in the Primary Scan are summarised below (Table 13).

Table 13: Reviews Summary – of multiple sites/experiences

Review Subject Categories	No. reviewed sites/ activities	Total no. reviews listed	Coverage Notes (supplementary 'Rankers' reviews are available for some of these.
Milford Sound - Boating	10	14,418	Reviews for experiences provided by Boat Cruise providers at Milford
Walks - Activity	17	4,009	A mix of walking experience sites and providers across the project areas.
Flights (scenic/transport)	16	3,674	Reviews for experiences provided by 16 Aviation providers
Accommodation	40	15,874	Includes Te Anau/Manapouri provider reviews. The 8 providers with DOC concessions comprise 3115 reviews.
Doubtful Sound - Boating	8	2,912	Reviews for experiences provided by Boat Cruise providers at Doubtful Sound. Includes some sea-kayaking.
Package Tours	9	2,816	Reviews for various package tour / bus tour-type providers operating to Milford
Other Activity - Boating	5	863	Reviews for other boat experience providers (e.g., jetboat, water taxi, fishing charters etc)
Kayak - Activity	1	776	A single sea kayaking provider at Milford
Corridor Experience	2	308	General Milford corridor overall experiences (complementary across other review categories)
Campsites	1	23	Supplemented by 4 review sites from rankers (not covered in TripAdvisor)
Other - Activity	19	4,140	A variety of activities, including specific attractions, diving, packrafting, short-stops not covered elsewhere.
Total	96	37,054	

(Online review sites – TripAdvisor / Rankers)

OVERALL EXPERIENCE EVALUATIONS

4.28 Individual Trip Advisor reviewers are able to assign rating scores to any sites/ activities/ experiences they are reviewing. Overall across all 96 reviewed sites/activities/experiences incorporating over 37,000 reviews, the mean percentage of responses giving a 'Very Good'-'Excellent' rating was 93%. Only 2 were below 50%.

4.29 This reinforces the common findings from most survey/monitoring approaches indicative high visitor outcome satisfaction / achievement with sites/ activities/ experiences in the project areas.

POSITIVE/NEGATIVE EXPERIENCE FEATURES

4.30 Similar to survey research findings, TripAdvisor reviews also demonstrate a high degree of positive and negative feature content which is only partly related to overall experience evaluations.

4.31 From the high-level summary of individual reviews in each of the 96 review subject sources the most common high-level positive and negative themes were summarised as below (allowing for individual differences in review subject types).

4.32 Common positive themes across all reviewed sites/activities/experiences included these main theme areas:

- Scenery/views /landscapes,
- Attentive/ authentic/ informative/ fun staff,
- Personal care, attention and consideration,
- Quality of facilities (where used/ required) was fit for purpose,

- Information and communication about the experience,
- Specific-activity features, unexpected 'extra' elements (extra activities/ opportunities, overcoming challenges etc),
- Strategic proximities (especially for accommodation),
- In some cases elements seen as positives by some visitors were seen as negatives by others, reflecting differences individual perceptions, preferences and expectations.

4.33 Common negative themes across all reviewed sites/activities/experiences included these main theme areas:

- Weather / sandflies were often mentioned,
- Cost was mentioned in some cases,
- Expectations not met (either through the nature of the experience relative to what was expected, or intervening factors such as weather, behaviours of other visitors or staff, trip disruptions etc),
- Staff that were not attentive/ authentic/ informative/ fun staff,
- Personal care, attention and consideration was lacking,
- Quality of facilities / maintenance / cleanliness was poor (where used/ required),
- Information and communication about the experience was inadequate, incorrect, absent or inappropriate (e.g., too much, too loud, insensitive etc),
- In many cases these types of elements seen as negatives by visitors were rationalised into otherwise positive responses (e.g., bad weather but great waterfalls, quite expensive but awesome experience etc). The occurrence of negative elements rarely resulted in expressions of overall experience failure.

IN-DEPTH ANALYSIS - MILFORD VISIT SPECIFIC

4.34 As a follow up to this high-level analysis, a more in-depth 'Drill down' analysis was undertaken for targeted review content for Milford Sound overall.

4.35 1000 Trip Advisor visitor reviews for Milford Sound had in-depth qualitative content analysis.

4.36 Of these 1000 reviews there were 807 where review respondent nationality could be determined. Of these 807, 88% (710) were International and 12% (97) NZ.

4.37 Of the 710 review respondents giving nationality, the proportions represented were Australia (27%), North America (24%), UK (17%), Asia (12%), Europe (6%), Other international (1%) and New Zealand (12%)

4.38 The travel modes used by the review respondents highlighted predominant use of either bus/coach or car/campervan vehicles (Table 14, Figure 46).

Table 14: Milford transport modes – review respondents

	Count	%	Notes
Bus/Minibus/van)	283	42	All uses, including 6 doing bus & plane combo
Car/Campervan	279	42	43% self-drove Milford Road (incl. other)
Aircraft	17	3	All uses, including 6 doing bus & plane combo
Cruise Ship	34	5	Note 3 used Cruise & bus (excursion)
Motorbike/cycle	5	1	Self-drove motorbike, bicycle (both land-based on Milford Road)

	Count	%	Notes
Land Transport total	*567*	*85*	*91% used Milford Road (all land modes)*
Total indicating travel mode(s)	*667*	*100*	The travel modes of 445 review providers (44%) could not be determined from text content.

(Online review sites – TripAdvisor / Rankers)

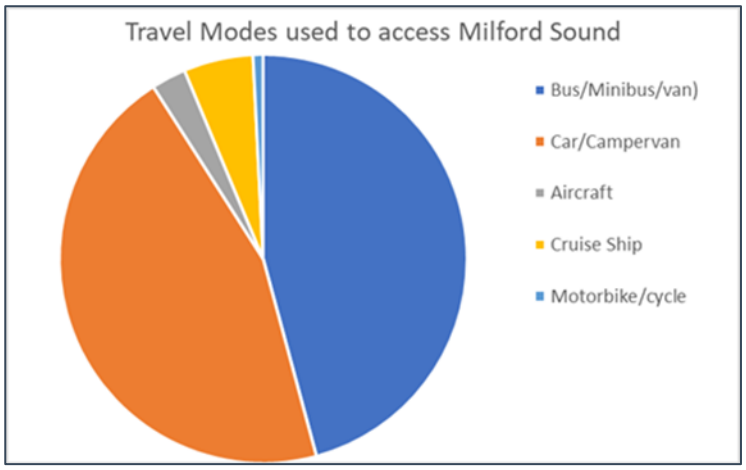


Figure 46: Milford transport modes – review respondents

OVERALL EXPERIENCE EVALUATIONS

4.39 There were very highly positive (96%) overall experience rating scores given (Table 15). These summarise the overall experience evaluation and accompany the written review text – which in turn typically outlines any salient positive and/or negative individual experience features (representing the subject material for the review coding analyses).

4.40 With the rating scale (1=Terrible/ 2=Poor/ 3=Average/ 4= Very Good/ 5=Excellent) the following overall review results were found:

Table 15: Overall online review rating scores

	Count	%
1 to 3 (negative/neutral scores)	41	4
4 to 5 (positive scores)	961	96
Total	1002	100

(Analysis of online reviews – TripAdvisor / Rankers)

4.41 Summarising analysis of the overall predominant content of the written reviews Table 16 reinforces the achievement of **positive outcomes overall**.

Table 16: Overall positive online reviews

	Count	%	Qualified
Positive	968	97	232 (24%) of these included qualified negative references - notably related to bad weather (=good waterfalls/ atmosphere), long drive (=worth it, scenic/stops)
Negative	49	5	14 (29%) of these included qualified positive aspects - notably related to scenic quality but qualified by reference to negatives
		n=1002	

(Analysis of online reviews – TripAdvisor / Rankers)

4.42 Around half of the reviews (520) included some form of recommendation comment, virtually all of which were positive (502, 96%), (Table 17).

Table 17: Overall positive visit recommendations

	Count	%	Statement types
Would recommend visit	502	50	Recommend', 'must do', 'worth it', 'returning' etc
Would not recommend visit	18	2	Would not recommend, don't go/do it etc
No recommendation	481	48	No specific recommend/not recommend component, but the vast majority of comment s were highly positive to effusive
	1002	100	

(Analysis of online reviews – TripAdvisor / Rankers)

4.43 Of those reviews giving no visit-recommendation type of comment, the comment content was usually very positive about the experience.

POSITIVE/NEGATIVE EXPERIENCE FEATURES

4.44 Coding criteria for the in-depth analysis of review comment content were developed from the initial broad '1. Multiple Reviews Summary' process. These were then refined further as the in-depth analysis was carried out and re-coding's were applied as required. See full range of categories in the summary overall table (Table 18).

4.45 The **top 15 positive statement themes** in descending mention count order were:

- Scenery/ views/ landscape (n=758),
- Milford Road positives,
- Seeing Wildlife,
- Price / worth it /good value,
- Milford Corridor short-stops/ photos,
- Weather - rain gives waterfalls*,
- Information /assistance services,
- Good commentaries,
- Experiencing waterfalls close-up,
- Photos/Photography,
- Staff interactions /service,
- Weather-type - sunny/clear/clearing,
- Food availability/ options / quality,
- Weather type – Atmosphere/Moody/Magical etc*,
- An individual (normally a service provider) who offered excellent assistance (n=66).

4.46 The **top 15 negative statement themes** in descending mention count order were:

- Weather type - rain/fog/clouds (n=240) – often qualified positively (see * items in positives list above),

- Long journey distance /travel-time,
- Crowding/ Congestion/ Conflict / Rushing,
- Milford Road negatives,
- Parking issues,
- Sand flies /bugs,
- Compare poorly/ other sites better,
- Milford Facilities - issues/limitations,
- Food availability/ options / quality,
- Milford Activities - other things to do,
- Overall Experience/Activity Disruption,
- Bad traffic behaviour,
- Price / worth it /good value,
- Road closure issues,
- Aircraft noise / disturbance (n=7)

Table 18: In-depth Reviews – Coded Summary Themes (count of mentions and positive / negative status)

Comment Theme	Count	+	-	Summary text
Scenery/views/landscape	758	758	0	All were positive, although some qualified that saying other sites were better (see below)
Milford Road - positives	320	320	0	Mainly scenic impact, short-stops, unexpected experiences, road better than expected
Weather type - rain/fog/clouds	240	0	240	Statements about poor weather experiences. Disrupting negative weather under overall experience disruption *(also refer the common positive qualifications of this under 'Weather type – atmosphere etc' and 'Weather types – rain gives waterfalls')*
Seeing Wildlife	216	216	0	Virtually all positive around marine mammal, and a few about kea encounters on Milford Road.
Price/worth it/good value	200	187	13	Worth it/worthwhile, often linked to positive qualifications of long journey and enjoyment of road/journey experience. Negatives - not worth long journey, some cost issues
Milford Corridor short-stops/photos	182	182	0	Comments about particular site experiences, travel breaks, related to Milford Road positives
Weather - rain gives waterfalls	162	162	0	Qualification of poor weather - creating more waterfalls
Information/assistance services	135	135	0	Information provided by drivers, guide, crew, administrative staff etc. little mention of any other information sources. A few comments about limited info/no Visitor Centre at Milford
Long journey distance/travel-time	132	0	132	Long travel times/distances notes, although commonly qualified in positive overall experience
Good experience commentaries	128	128	0	The travel/experience commentary by drivers, guides, vessel crews
Food availability/options/quality	124	93	31	Some liked options on boats, some didn't. Free tea/coffee popular. Milford options limited. Some issues with having buffets first up creating rush when trips start/cut into viewing time.
Experiencing waterfalls close-up	119	119	0	Virtually all about going under waterfalls
Photos/Photography	109	109	0	Photo comments, often that they don't do the settings justice
Staff interactions/service	105	101	4	Virtually all positive experiences of drivers, guides, crew etc Very few negative mentions.
Weather type - sunny/clear/clearing	97	97	0	Statements about good weather experiences.
Crowding/Congestion/Conflict/Rushing	93	0	93	Too many people, boats, vehicles; schedule pressures; physical difficulties; some behaviours
Weather type - Atmosphere/ Moody/Magical etc	75	75	0	Qualification of poor weather - creating more atmosphere
Standout named individual	65	65	0	Positive mentions of named individuals for enhancing experiences
Milford Road - negatives	63	0	63	Road difficulty/ discomfort/ concern; poor driving behaviours
Te Anau specific mentions	63	63	0	Mostly mentions about short-stops or stopovers as part of wider Milford/Fiordland trips
Customer service/Visitor management	62	55	7	Well organised, responsive, flexible, helpful *(or not for negatives)*. Linked to management/organisation
Parking issues	58	0	58	Congestion at Milford Sound, linked to distance to terminal and a few shuttle issues
Recommendation - allow more time	57	n/a	n/a	Recommendations to allow more time, mostly for other activities at Milford or Corridor short-stops
Weather qualified other	55	55	0	Miscellaneous qualifications of bad weather (to positives overall)

Comment Theme	Count	+	-	Summary text
Small scale/group	53	53	0	Small vessels, small group sizes all preferred. Associated with closer attention
Recommendation - avoid peak times	50	n/a	n/a	Recommendation to adjust travel times early or late to miss demand boat cruise times
Extra Activity - Underwater observatory	38	37	1	Virtually all positive mentions.
Sandflies/bugs	36	0	36	Annoyance
Compare poorly/other sites better	33	0	33	That other sites are more impressive, although usually qualified as good/impressive but….
Facility standard /presentation	33	30	3	Mostly about good/sufficient seating on boats, a few on comfortable bus seats. Negatives mostly for insufficient boat seating
Milford Facilities - issues/limitations	33	1	32	Limited food, information/signage, visitor centre facilities, some toilet comments
Quiet/calm/remote setting	30	30	0	Positive comments (some negative perspective under noise/disturbance)
Milford Activities - other things to do	28	1	28	Limited walks or any other activities at Milford although the few available are good.
Natural/unaltered setting	25	25	0	Usually related to scenery, undeveloped settings *(comments elsewhere related to noise/congestion etc)*
Overall Experience/Activity Disruption	25	0	25	Physical disruption of activity/experience, usually associated with road conditions/weather
Extra Activity - Kayaking	22	22	0	Virtually all positive, no negative
Intention to Return	20	20	0	Indications of desire to return
Bad traffic behaviour	15	0	15	Examples of dangerous or inconsiderate driving
Road closure issues	10	0	10	Road closure occurrences
Aircraft noise/disturbance	7	0	7	Presence and/or sound of aircraft, linked to crowding/congestion perceptions
Extra Activity - Other	6	6	0	Walking Milford, Glow worm Caves in Te Anau included
Personal care/attention	5	5	0	Examples of personal extra attention/care
Like glass roof bus	5	5	0	Positive response when experienced
Wifi/Phone access	4	0	4	Gaps in coverage
Activity too short	4	0	4	Desire for more of the activity/experience
Bad/Inappropriate behaviours	3	0	3	A few bad behaviour experiences, linked to crowding/congestion perceptions
Cleanliness/condition/upkeep/maintenance	3	3	0	Quality praised at particular facility
Maori content	3	3	0	Only a very few mentions of maori culture
Social/meeting experiences	2	2	0	Meeting people, pleasant encounters
Toilets/Waste	1	1	0	Quality praised at particular facility
Other	39	n/a	n/a	Miscellaneous comments - a few example comments

4.47 In-Depth Review summary

- **Positive experiences** - The majority of comments both in terms of overall content and in terms of individual comment themes were positive.
- **Negative aspects were usually qualified** - Most often where negative comments themes were noted, they occurred in the context of overall positive comments and/or included specific qualifications that resulted in a positive context.
- Visitor review comments highlighted **virtually no negative themes that were indicative of significant impacts on overall experiences**. This was consistent with the overall findings from the Multiple Reviews Summary process and the Review of Research Reports.

5 UNDERSTANDING COMMERCIAL OPERATOR AND RECREATIONIST PERCEPTIONS

5.1 A range of engagement was undertaken with tourism operators and recreationist through 2020. This included running reference groups, web-based engagement surveys, interviews, site visits and meetings. From this engagement it was clear that operators and recreationist had very strong perceptions and opinions about Milford Sound Piopiotahi, the local tourism sector, recreational activity, opportunities, and the future of the region. The main summary findings from this engagement are outlined below.

OPERATORS

CONCESSIONS / LEASES

5.2 The majority concessionaires who participated in the engagement process raised concerns about the concession system operated by the Department of Conservation.

5.3 No operators believed the system was perfect citing delays in concession renewals, the time it took to secure new concessions, delays in getting permissions to undertake additional developments and maintenance. Some operators perceived the Department of Conservation had “little or no understanding of business demands” such as delays in granting concessions renewals “potentially forcing operators to be in breach of banking covenants”.

5.4 Some operators also perceived that the concessions and lease structures “locked in” incumbent operators and stifled innovation and indirectly created a monopoly of what one interviewee called “old boy” operators. Confidentially, some expressed concern that Milford Sound Tourism Ltd had outgrown its usefulness as a head concessionaire. This perception was raised by several individuals who were concerned about ramifications on the sector and their own potential operations.

5.5 Another concern from some smaller operators was concession compliance. They perceived that a lack of forceful compliance from the Department of Conservation did not assist in creating a level playing field. The most sighted example being external, “pirate” tour guides coming into the area without any apparent concessions.

AVIATION

5.6 Publicly aviation operations in Milford Sound Piopiotahi were strongly supported by most operators, particularly those involved in aviation themselves. Some of the operators not directly involved in aviation stated that although aviation has no direct impact on their operations, because it was a historic activity dating back to the 1950s it should stay, so long as “we (the non-aviation operators) are not required to cross subsidise the airport”.

5.7 The aviation sector expressed a strong desire to retain the ability to land at Milford Sound Piopiotahi. Aviation operators justified a retention of the status quo for many reasons including perceived heritage landing rights, wider economic benefits to the tourism sector, generating local employment, facilitating higher end visitors, and environmental improvements.

5.8 One of the issues often cited was that many in the sector believed they had responded to Department of Conservations historic concerns by investing in new aircraft that were larger, quieter and more fuel efficient and with this investment there was a perception (if not tacit agreement) that operators should be afforded long term access. This is perhaps best reflected in one operators’ statement that “we have done everything DoC asked of us over the years so that implies we should have long term rights. We have spent big money on new planes so we should have rights for the life of that investment”.

5.9 The sector also explained that operating an aviation business was fraught with financial difficulties and challenges. Some operators said that they had good and bad years and were often dependant on a good year carrying them through a bad financial year. Factors such as

competition, seasonality, and alpine flying conditions all combined to make many of the business "marginal" at times. Operators, stated that they had no capacity to contribute towards additional concession fees, charges or infrastructure renewals in places such as Milford Sound Piopiotahi airdrome.

5.10 Most operators (both fixed wing and rotary) also stressed the importance of being able to land at the Milford Sound Piopiotahi airdrome. Interestingly all reported their visitors rated the actual scenic flight in and out as being more memorable than undertaking activities on the ground. However, it was reportedly the desire to reach Milford Sound Piopiotahi quickly to undertake a boat trip that was the initial motivation for most visitors to book flights. As a result, there was a fear amongst operators that a loss of landing rights would make many businesses non-viable.

5.11 Aviation operators were very concerned about the condition of the airport buildings and many desired the runway to be maintained to a higher standard over the longer term. The lack of toilets and a small, covered terminal was perceived as an impediment to lifting the visitor experience at the Milford Sound Piopiotahi airdrome. There was also concern about proposed staffing of the control tower (and related services) being potentially stopped or reduced in the future. Such proposals were perceived as undermining safety at what is already a challenging airport and airspace. Some operators perceived central and or local government should be more proactive in subsiding the needed airport improvements and operations believing it should be viewed "as an investment in core regional tourism infrastructure which benefits New Zealand nationally".

WILLINGNESS FOR CHANGE

5.12 All operators demonstrated some willingness to see change and optimisation. However, perceptions around what constituted change and how much change was required varied significantly. Those with the most historic connections and largest business interests were generally the most cautious and warned against "change for changes sake". They were also more likely to favour incremental adjustments and were opposed to the potential loss of concession rights or leases that had been held and developed over many years. They were proud of their achievements and the way they and their organisations had stepped in and helped to grow the industry in Milford Sound Piopiotahi and the wider region. As one explained "no one was really stepping up, so we did ourselves and with others".

5.13 More recent operators tended to be the most supportive of changes and some were open to "a complete shake up of everything" if it could deliver better overall outcomes. They were generally willing to acknowledge that they had less to lose because they saw themselves as "disruptors" within the sector. They did not perceive the sector was necessarily "a level playing field" because of perceived historic infrastructure, concession, and lease structures. They did not want to elaborate in detail for business reasons.

5.14 Common alignment existed between operators in two areas, protecting the environment / conservation and improving the visitor experience. Most operators perceived more could be done in these areas.

CRUISE SHIP SECTOR

5.15 The cruise ship sector representatives and the Tourism Industry Association (TIA) perceived that international cruise ships played a vital role in New Zealand's tourism economy. It was acknowledged that larger cruise ships had little direct input into the local economy. However, the New Zealand Cruise Association perceived that this was compensated by passenger fees paid to the Regional Council that in turn could be used for local environmental initiatives.

5.16 The New Zealand Cruise Association stated that "Fiordland is an important part of cruise itineraries – without Milford cruise ships are less likely (and perhaps even unlikely) to travel to South Island ports. This would have a significant impact on other ports and South Island regional economies, such as Otago".

5.17 In general, they perceived that cruise ships were not currently causing any undue impacts or risks and there was little or no validity in changing the status quo. This was perceived as being

particularly true given that cruise ships were reported as primarily entering the area only early in the morning and in the evening outside the time of most shore-based visitation.

EXPERIENCE QUALITY

5.18 Most organisations expressed a strong desire to lift experience quality of visitors to Milford Sound Piopiotahi. For many this was directly related to the quality of infrastructure and to a lesser degree service quality. Many reported to high visitor satisfaction rates, but still acknowledged improvements could be made.

RECREATIONISTS

5.19 'Recreationists' were typically engaged in activities other than visiting Milford Sound Piopiotahi to make a boat trip (usually locals/new Zealanders/private activities). They were instead largely focused on independent recreation activity and/or using sites and areas more associated with access via the Milford Road Corridor than from Milford Sound Piopiotahi itself. The main summary themes emerging from the findings from recreationists were highly integrated and references to these below are overlapping and include some repetition in different contexts.

SATISFACTION

5.20 Most recreationists were quite satisfied with the recreational opportunities that they currently had access to (mostly off the Milford Road Corridor) but did acknowledge that some changes and improvements were needed. These were related especially to how the mass visitation in Milford Sound Piopiotahi worked and with associated traffic pressures both at the village and along the Milford Road.

5.21 Most accepted the experiences at Milford Sound Piopiotahi as being what they were, but often qualified this by saying they were not necessarily the types of experiences they would usually be seeking for themselves (they sought their desired experiences elsewhere instead).

5.22 The main exceptions where some satisfaction compromises were apparent related to those recreationists engaged in more remote backcountry types of activities and areas who were subject to external effects from more mass-tourism types of activities. Typical examples included climbers based from the Homer Hut/Gertrude Valley exposed to aircraft noise and private boat users on Milford Sound Piopiotahi exposed to aircraft noise and boat cruise activity near Deep Water Basin. Recreational boat users perceived they could often not 'avoid' visitors on land because there was only one boat ramp at Milford Sound Piopiotahi.

WILLINGNESS FOR CHANGE

5.23 Strong opposition to facility or management change was not evident so long as a series of recreational qualifications were met. These can be summarised as:

- The freedoms to undertake current activities and experiences were not compromised by changes in visitor numbers, activity type provisions or management practices/requirements around access (especially in relation to transport options, use-level rationing, desired site and/or facility access, and access fees).
- The application of management practices/requirements would be differential – either being of no constraint or cost to 'locals' or 'New Zealanders' or at much lower levels compared to international visitors (more restrictive/costly to overseas visitors / 'tourists').
- Any physical development of upgraded or new facilities or sites would be very 'low key' and 'low impact', being visually and physically minimal and with minimal environmental impact. Although, many were accepting of intensification if it resulted in a smaller overall footprint of development or demonstrable environmental gains.

AREAS OF CHANGE

5.24 Most recreationists appeared to feel that subject to such qualifications (as outlined above), a greater range of recreational sites, facilities and experience options would be preferable both

along the Milford Road Corridor and at Milford Sound Piopiotahi itself (where it was quite commonly felt that apart from boat cruises “there wasn’t really anything to do”).

5.25 Recreationists interested in cycling options in particular were interested in new opportunities being considered in the Milford Road Corridor and around Te Anau. With respect to some activity development options there were concerns around National Park regulations and real/perceived constraints (for example, expanding some cycling options near Te Anau and along parts of the Milford Road Corridor).

5.26 Changes that brought about greater recreational accessibility were also seen as beneficial. Areas mentioned included easier parking opportunities for those carrying heavy recreational equipment, safer carparks or shuttle services to track heads, improved recreational trailer boat parking, and safer roads.

5.27 Providing a spectrum of recreational opportunities was also seen as important by some. For example, a range of walking opportunities and huts in different areas that catered for the novice and families through to the experienced tramper, with such experience opportunities suitably separated from each other. Offering greater certainty to recreationist around parking and camping in an area heavily utilised by tourists was also perceived as being beneficial.

6 JOURNEY MAPPING AND VISITOR PERSONAS

JOURNEY MAPS

6.1 To assist the evaluation of shortlist items a series of three summary journey maps were developed covering recreationists, domestic visitors, and international visitors. They were based on available secondary data, reference group discussions, and community engagement feedback. Importantly they are all future state focused.

6.2 These journey maps although high level and general in nature (given the breadth of the experiences being covered, and number of sites being considered) do set out clear differences in how certain visitors would discover, travel, and then interact with the initiatives being proposed.

6.3 The following journey maps assume the transport model option is in place. This includes a transport hub at Te Anau (the starting point for most coaches and buses), hop on/hop off bus system servicing key hubs, nodes and smaller stops, and an express coach or tour coach. They also assume that the selected options being proposed at Milford Sound Piopiotahi are in place.

RECREATIONISTS

6.4 The discover and planning phases of the recreationists' visit are likely to be faster than those of international visitors (and most domestic visitors) (Figure 5.1); although exceptions will clearly exist for those planning, booking, or undertaking activities such as great walks and those planning more complex back country or off trail expeditions (such as pack rafting, climbing, and walking experiences). Other recreational experiences such as day walks, kayaking, fishing, and hunting may be planned and decided upon and commenced within hours (assuming the recreationist lives locally or regionally. They may also be commenced or cancelled at short notice if the activity is weather dependent). Booking accommodation (if required) and parking must therefore be as responsive as possible (the proposed transport model takes this into account, see Transport Report).

6.5 The first point of arrival may be the transport hub if the recreationist is a day or multi day walker and they have opted to use the hop-on hop-off bus rather than leaving their car unsupervised at a track head. Alternatively, the recreationist may use their own car to reach the corridor or Milford Sound Piopiotahi as this is still likely to be the main mode of transport for recreationists undertaking activities that sometimes require early starts and/or late finishes, or involve heavy equipment, firearms etc.

6.6 Once in the corridor the recreationist can undertake a range of optimised front country sites or choose to progress more rapidly into the back country. In Milford Sound Piopiotahi recreationists are most likely to undertake boating, kayaking, and walking types of experiences. They can access the boat ramp, parking, tracks, and accommodation on an as required basis. Those completing multi day walks also have the option of utilising the hop-on hop-off bus to return to Te Anau.

6.7 At the conclusion of their visit recreationists will have the opportunity to observe the corridor as they leave, and post trip reflect on their experiences.

DOMESTIC VISITORS

6.8 Domestic visitors are likely to spend longer on the discovery and planning phases than recreationists (Figure 5.2). They can be anticipated to book experiences such as Milford Sound Piopiotahi throughout the discovery, planning and travel phases of their journey (although a greater proportion can be expected to select Milford Sound Piopiotahi earlier rather than later). They will have the option to travel independently, on a coach or on a hop-on hop-off bus. With good marketing even those traveling independently could be expected to visit the experience hub in Te Anau, especially those staying in the town. This will afford them an opportunity to be welcomed and receive an orientation experience.

6.9 Within the corridor a proportion of domestic visitors could be anticipated to undertake slightly wider range of experiences than their international counterparts. Particularly those staying in the corridor or in surrounding areas. The vast majority will however remain focused on short stop experiences (such as short walks, observation points, interpretation) as they travel through the corridor to reach Milford Sound Piopiotahi.

6.10 Once they reach Milford Sound Piopiotahi most domestic visitors can be expected to arrive at the central experience hub and receive orientation and interpretive experiences. From here they can circulate to the experiences that are most relevant to them. For most this will mean undertaking a scenic boat experience. However, a wide range of enhanced walking and observation experiences will also be on offer that are likely to be appealing. For the small proportion who add an accommodation experience to their visit more time will be available to explore.

6.11 At the conclusion of their visit, they will have the opportunity to observe the corridor as they leave in their private vehicle, coach or bus, and post trip reflect on their experiences.

INTERNATIONAL VISITORS

6.12 When compared to recreationists and domestic visitors, international visitors are likely to spend longer on the discovery and planning phases of their trip (Figure 5.3). They can be anticipated to book experiences such as Milford Sound Piopiotahi throughout the discovery, planning and travel phases of their journey. They will travel on a coach or on a hop-on hop-off bus and will visit the experience and transport hub in Te Anau. This will afford them an opportunity to be welcomed and receive an orientation experience.

6.13 Within the corridor the vast majority will be focused on short stop experiences (such as short walks, observation points, and interpretation) as they travel through the corridor to reach Milford Sound Piopiotahi. Those utilising the hop-on hop-off bus and accommodation nodes will have more freedom to explore and undertaken longer activities.

6.14 Once they reach Milford Sound Piopiotahi international visitors will arrive at the central experience hub and receive orientation and interpretive experiences. From here they can circulate to the experiences that are most relevant to them. For most this will mean undertaking a scenic boat experience. However, for some visitors they may be content to undertake more passive activities in or close to the hub (eating, observing nature, taking photos and socialising).

6.15 For those that are more active a wide range of enhanced walking and observation experiences will also be on offer. For the small proportion who add an accommodation experience to their visit more time will be available to explore.

6.16 At the conclusion of their visit they will have the opportunity to observe the corridor as they leave in their private vehicle (for those with booked accommodation), coach or bus, and post trip reflect on their experiences.

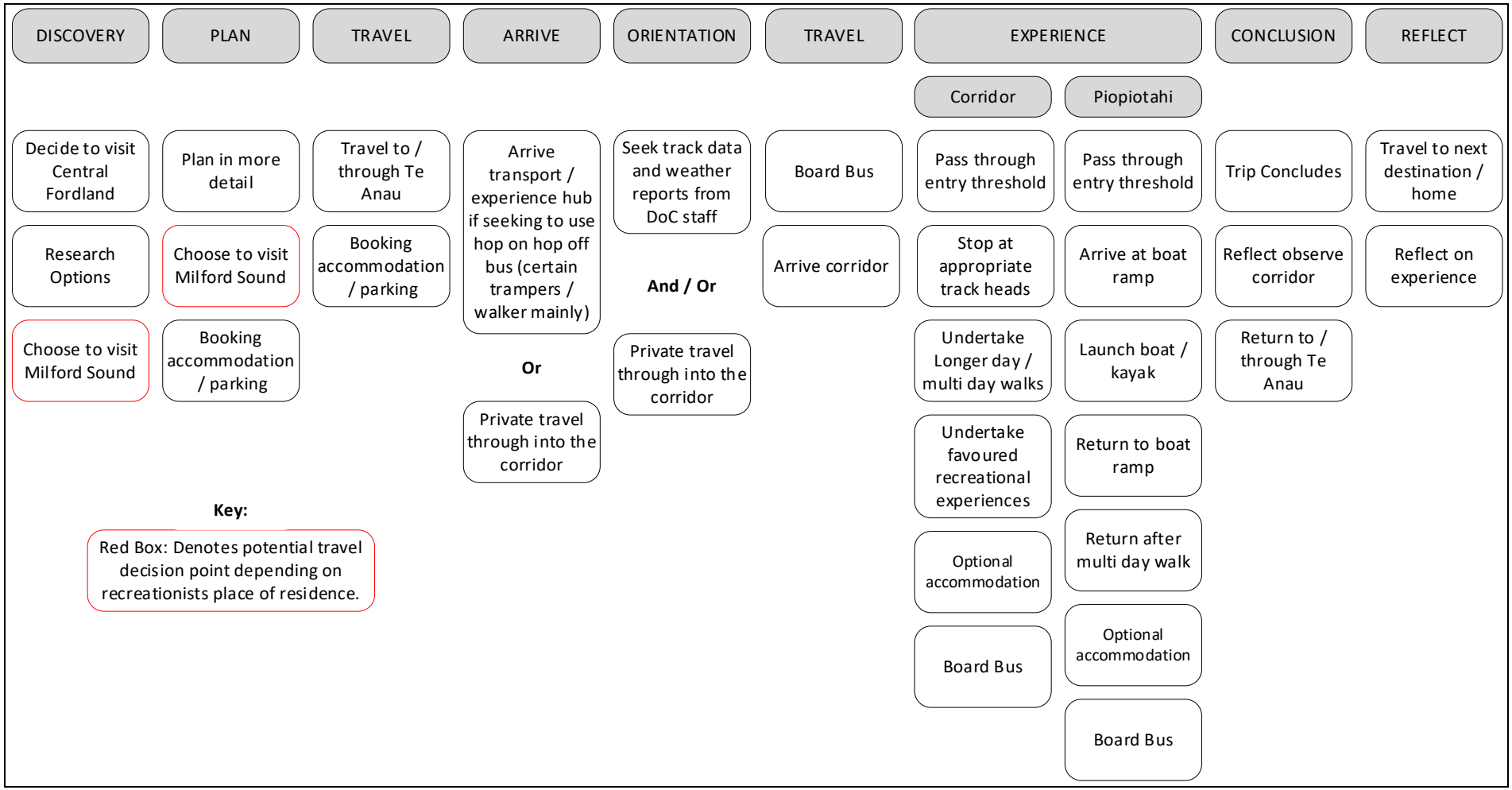


Figure 47: Recreationists – Hypothetical Journey Map

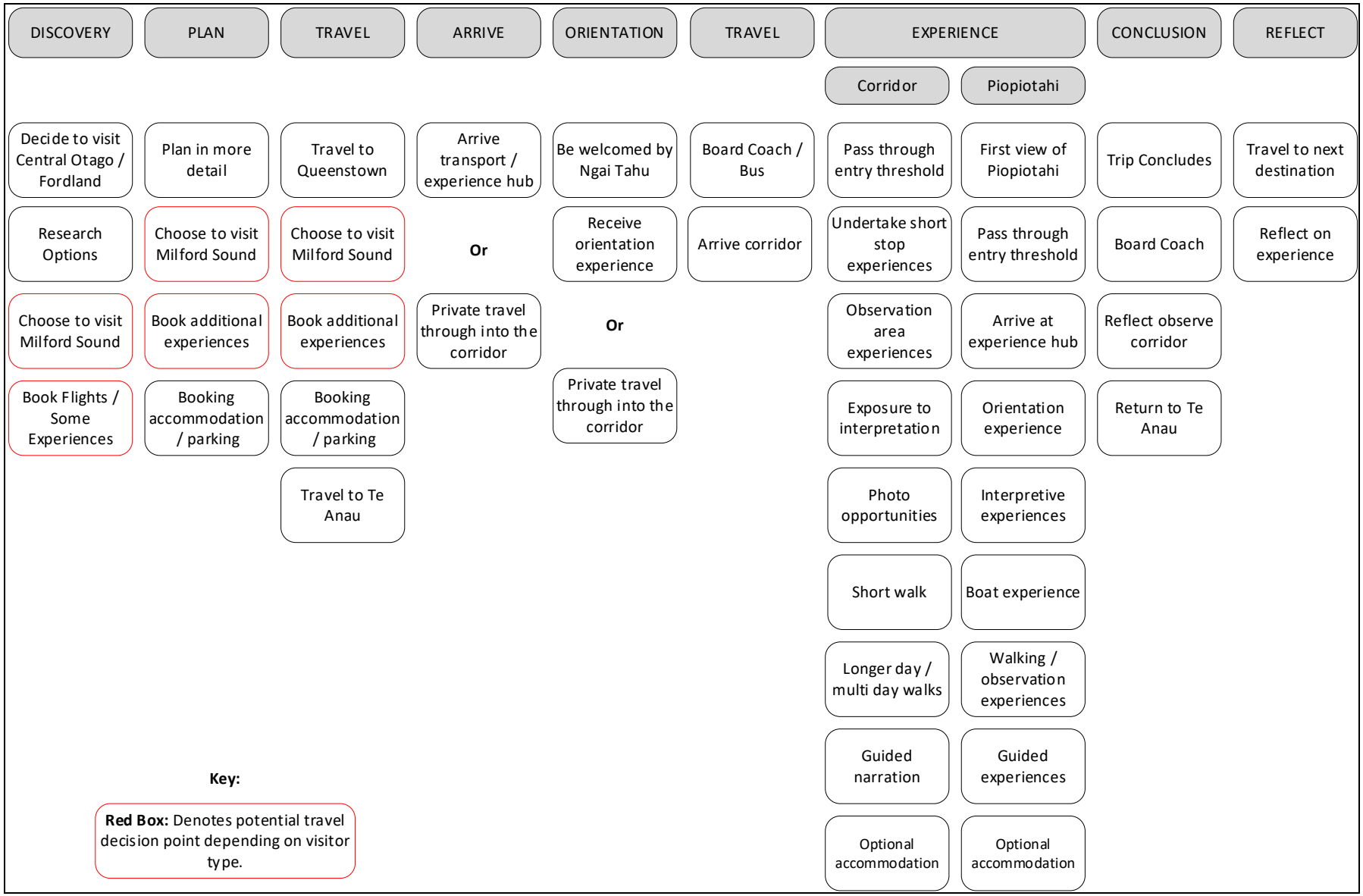


Figure 48: Domestic Visitors – Hypothetical Journey Map

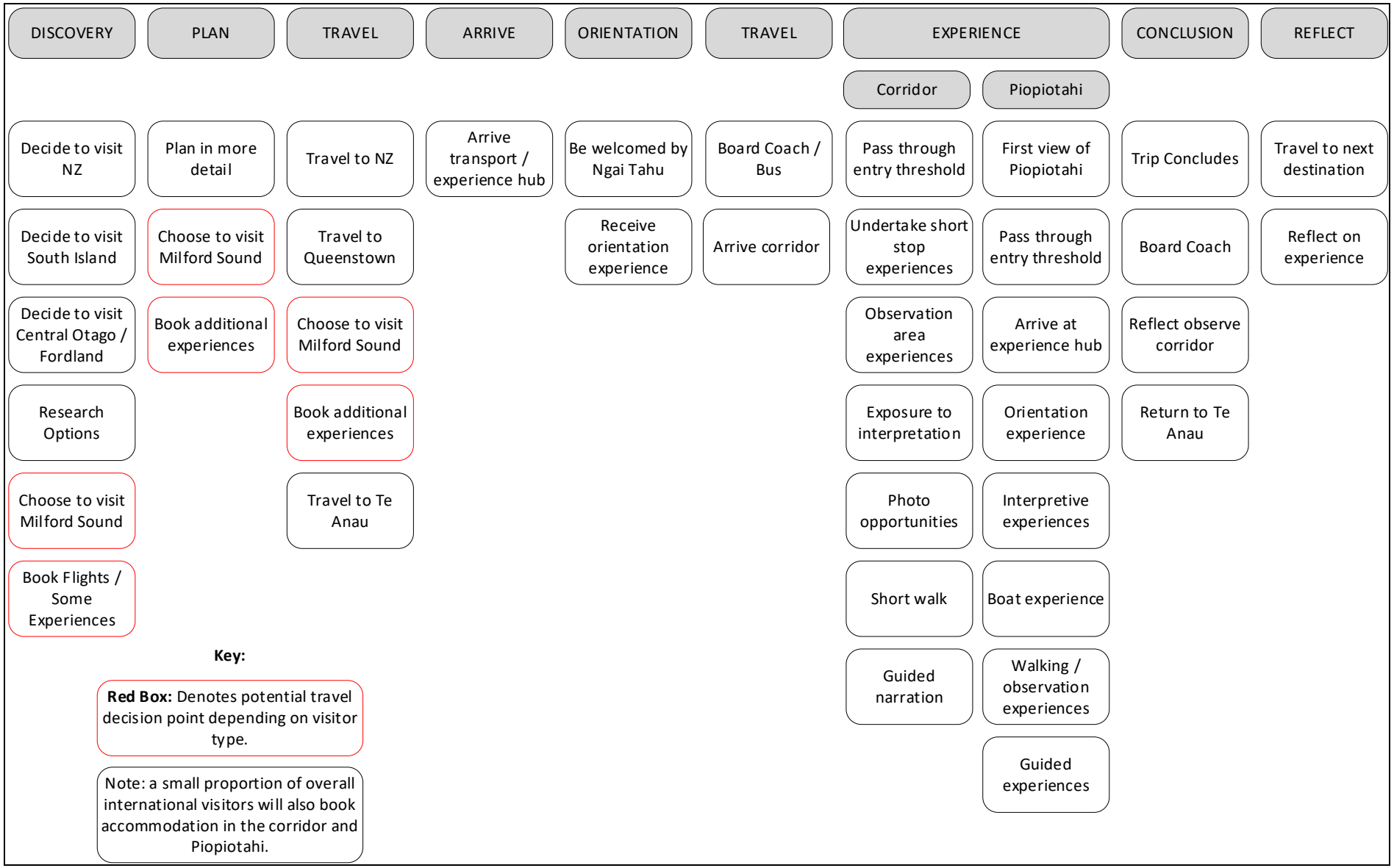


Figure 49: International Visitors – Hypothetical Journey Map

VISITOR PERSONAS

6.17 Visitors to Milford Sound Piopiotahi and the Milford Road Corridor are far from homogenous or simply classified. Not all visitors are visiting a location for the same reasons or place an emphasis on seeking the same types of experiences (and facility/service standards) at any given time. To understand the diversity in the types of experiences different visitors are seeking and how these can be met in the Master Planning process a series of hypothetical composite personas have been developed as examples[22].

6.18 These personas are grouped to represent the two primary visitor activity contexts around Milford Sound Piopiotahi and the Milford Corridor:

- Milford Sound Piopiotahi Visitors - primarily to take boat cruises,
- 'Other' Recreational Activity Visitors ('Recreationists') - primarily to undertake specific recreation activities in and around the wider Milford Corridor and Fiordland areas (including Deep Water Basin recreational access).

MILFORD SOUND PIOPIOTAHI FOCUSED VISITORS

6.19 These are visitors whose focus for their visit to the Fiordland area is to experience Milford Sound Piopiotahi. It is their target destination, and their primary visitor experience objective is most usually based upon taking a boat cruise. This would include those who possibly stay in Te Anau as part of their otherwise largely Milford-targeted travel. Some of these visitors could also be engaged in some of the predominantly short walks (possible along the Milford Corridor or the range of activities around Te Anau). Most of these visitors would be looking for value-for-money experiences[23].

6.20 Optimising facilities and services to have the most authenticity possible will best generate positive visit experience outcomes. This authenticity would apply to:

- how facilities and services are included and delivered appropriately in these highly protected and reputed natural settings.
- how service providers interact with visitors in the most friendly, real and considerate terms treating them as real people that they do care about.
- the delivery of good 'value-for-money' (which does not always mean cheap).
- how the visit expectations generated before a visit were fulfilled (and ideally exceeded) in the final visit experience evaluation.

6.21 The following hypothetical personas have been developed as planning guides to assist option development and selection. The personas consider what people currently do (current state), not what they could do when the master plan interventions are implemented (future state).

Barry (aged 30) travelling from Australia with his wife. (International)

6.22 **Profile:** Barry's grandfather worked on the Milford Road for many years and it is a colourful part of the family story, although Barry has never visited before as he was born in Australia. He has come to see the source of so many of his family's tall tales, especially as his grandfather met his grandmother on a tour boat. The visit to this area is part of a longer New Zealand visit to see family.

[22] Because of the limitations caused by COVID and floods we have adapted our approach to develop example personas to represent our different types visitors based on available data, feedback and informed interpretation.

[23] 'Value for money' does not mean cheap experiences. Visitors are prepared to pay a price that equates with the value of the experience they receive.

6.23 **Activity context:** A family pilgrimage visit to see the area and take a boat trip.

6.24 **Context of visits to Milford Corridor:** To see the road all the way through to Milford Sound.

6.25 **Context of visits to Milford Sound Piopiotahi:** To see where his grandparents met, and to visit a New Zealand icon he has seen images of and heard stories about all his life.

6.26 **Key site interactions:** Mainly from along the road, the boat terminal and the boat.

6.27 **Visit sensitivities / outcome desires:** Just happy to see the place, bad weather is OK as there were many family stories about that. On a budget and looking to maximise time so interested in only spending money on a few key planned attractions that are of most interest. Barry is happy to drive and explore key Southland attractions in his own rental vehicle.

Susan (aged 76) travelling from Auckland with her husband. (Domestic)

6.28 **Profile:** Susan and her Husband have been trying to tick off bucket list items for quite a few years and always wanted to visit Milford Sound. She and her husband are not quite as sprightly as they used to be but are still in good health, reasonably fit and keeping active. They have used public transport to get to Te Anau as driving is more of a challenge and time consuming generally and are taking a coach to Milford. They chose to travel to Milford from Te Anau as the journey from Queenstown involved too much travel time on a coach.

6.29 **Activity context:** Finally making a long-desired trip to Milford Sound.

6.30 **Context of visits to Milford Corridor:** Passing along it as part of their trip to Milford Sound but enjoying some of the short stops and very short walks, with rests on the coach between them.

6.31 **Context of visits to Milford Sound Piopiotahi:** A bucket list item, intending to take a slower nature cruise to enjoy the day at a more leisurely pass, and for more information and guidance about the natural features.

6.32 **Key site interactions:** Their coach stopping at short stops along the corridor and passing through the boat terminal at Milford.

6.33 **Visitor sensitivities / outcome desires:** Not bothered by others on their trip although ideally wanting something not too busy or crowded; desire walks that are not too rough or stops that are too rushed; favour good weather; learning some interesting things; meeting nice people.

Jenny (aged 38) travelling from Christchurch with her husband and young son. (Domestic)

6.34 **Profile:** Jenny spent her early years on a farm near Mossburn but as a teenager her family shifted to another property near Christchurch. After an extended OE she returned with her English husband to help run the family farm. While on a trip South to visit her grandparents with their new young son she is taking the opportunity to show her family some of her childhood places.

6.35 **Activity context:** A ‘highlights and memories-viewing’ family trip in Western Southland as part of a parental family visit.

6.36 **Context of visits to Milford Corridor:** As a child with her family driving up it for a memorable visit to Milford Sound. They are driving so they can visit some sites along the way that she remembers going to, and so they have flexibility with their son.

6.37 **Context of visits to Milford Sound Piopiotahi:** Her family visited when she was a young child, and she has never forgotten it. She wants to share it by taking the journey to Milford Sound Piopiotahi and doing a scenic boat cruise.

6.38 **Key site interactions:** Stopping to see the keas she remembered from her childhood visit and then going down to Milford. Checking out the Chasm on the return trip after hearing others on boat mention it and that it was a good location for small kids.

6.39 **Visit sensitivities / outcome desires:** Open to the experience as she remembered it; having family-friendly facilities (changing, toilet, pram-friendly etc); good weather; ticketing flexibility if late changes needed, a memorable experience with their child; seeing keas.

Marry (aged 36) traveling from China with her husband, two sons and her retired parents. (International)

6.40 **Profile:** Marry and her family are travelling in a guided group around New Zealand. Some of their friends and acquaintances in China have visited before and recommended doing this trip. Part of the reason for the trip is also to research New Zealand as a possible educational option for their sons in the future. Milford Sound is a prominent 'must do' highlight in their trip schedule.

6.41 **Activity context:** A guided group visit to Milford Sound for a boat cruise travelling in a group minibus. Starting the day from Te Anau.

6.42 Context of visits to Milford Corridor: Passing through the Corridor on the way to Milford Sound but stopping at a few popular sites for short walks and photos.

6.43 **Context of visits to Milford Sound Piopiotahi:** A key highlight of their group tour schedule.

6.44 **Key site interactions:** Short stops along the corridor and through to the boat terminal.

6.45 **Visit sensitivities / outcome desires:** Good weather for photos at Milford; good food options; not too strenuous for parents; avoiding language challenges; good value for money; wildlife encounters (kea); seeing something unique.

Gwen (aged 22) travelling from the UK with her friend Polly. (International)

6.46 **Profile:** Gwen and her friend Polly are backpacking around New Zealand and Australia. (International)

6.47 **Activity context:** A visit to Milford Sound is considered a 'must-do' in New Zealand. They are making a day trip by coach from Queenstown as they're based there for a few days and have lots of other activities and nightlife planned.

6.48 Context of visits to Milford Corridor: Passing through the Corridor by coach on the way to Milford Sound but stopping at a few popular sites for short walks and photos.

6.49 **Context of visits to Milford Sound Piopiotahi:** Visiting one of the places highlighted in the websites and social media sites she researched about New Zealand, and particularly as a day activity option from Queenstown.

6.50 **Key site interactions:** Short stops along the corridor and through the boat terminal.

6.51 **Visit sensitivities / outcome desires:** Open to anything really; keen on meeting people/socialising; good value prices; always keen on a good deal but do not mind spending a bit more on something special; having good photo opportunities and wow experiences.

Aisha (aged 28) traveling from India with her husband. (International)

6.52 **Profile:** Aisha and her husband can travel a lot. Usually, they look for higher end resorts or urban-cultural destinations but are taking a more natural scenery-oriented approach here based on New Zealand's reputation and advice from relatives. This comprises mainly visiting more accessible scenic sites and areas.

6.53 **Activity context:** As a visit to Milford Sound is considered a 'must-do' in New Zealand they have prioritised coming here but have chosen to fly as the bus journey from Queenstown is long. Also flying in a small plane over mountains like these is not something they have ever done before and they like a touch of adventure.

6.54 Context of visits to Milford Corridor: They only fly over those parts on the main flightpaths but are keen on the sightseeing component and the adventure of landing in Milford.

6.55 **Context of visits to Milford Sound Piopiotahi:** A priority destination for them, including a boat cruise, with the flight access adding to the overall experience. The flight transpires to be more of a wow for them than the boat cruise.

6.56 **Key site interactions:** Milford Airport and through the boat terminal.

6.57 **Visit sensitivities / outcome desires:** High quality experiences and services; feeling welcomed and special; not so interested in more active experiences; good weather and memories, excitement on the flight, natural splendour.

Lutz (aged 36) traveling from Germany with his wife and two 12-year-old daughters. (International)

6.58 **Profile:** The family is on summer visit to New Zealand and are keen on experiencing nature, outdoor activity and culture. They have been travelling by campervan and doing various sites, walks and activities. They have done the Routeburn-Greenstone loop from Queenstown (including going up to Key Summit) and the Kepler Track from Te Anau. As part of their stay in Te Anau they are also making a day trip to Milford in a shuttle bus trip focussed on more natural experiences and information.

6.59 **Activity context:** An early start day trip from Te Anau in a guided small shuttle bus tour with longer short-stops along the corridor and taking a cruise on a smaller boat at Milford with a more natural focus.

6.60 Context of visits to Milford Corridor: A few longer guided short stops at attractive sites with more in-depth nature information.

6.61 **Context of visits to Milford Sound Piopiotahi:** Being booked on a smaller boat to cruise on Milford Sound with more specific nature interpretation.

6.62 **Key site interactions:** Key short stops along the Milford Corridor (although longer than on most coach options) and through the boat terminal (or Deepwater Basin). Possible option of short landing at Sandfly Point for a short walk on part of the Milford Track.

6.63 **Visit sensitivities / outcome desires:** High quality natural and (if available) cultural experiences, not too many people or signs of development, personal engagement (especially with the kids); experiencing natural splendour; natural, cultural and environmental learning; interacting with guides and other campers and activity participants.

Jack (aged 21) travelling alone from the United States. (International)

6.64 **Profile:** Jack has been travelling around the South Island on a Hop-On Hop-Off backpacker coach service. He has taken a few days in Te Anau to undertake a few activities such as a e-bike/Jet Boat combo loop trip on the Waiau River and a day trip to Milford. He has heard that climbing to Key Summit and Gertrude Saddle are awesome side-trip experiences, but he cannot fit them into a Milford trip at the moment unless he meets someone in the hostel with a car who is keen. He got lucky in Queenstown meeting people to do some adventuring up on the Remarkables.

6.65 **Activity context:** He has some flexibility to do different trips if transport options allow but at this stage is only planning a day trip to Milford.

6.66 Context of visits to Milford Corridor: Passing through the Corridor by coach on the way to Milford Sound but stopping where the coach does at a few popular sites for short walks and photos. Is interested in longer walk options but current transport options do not allow this. Interested in any walks at Milford Sound if time available.

6.67 **Context of visits to Milford Sound Piopiotahi:** Visiting a site highlighted in all his research on New Zealand.

6.68 **Key site interactions:** Short stops along the corridor and through the boat terminal.

6.69 **Visit sensitivities / outcome desires:** Open to adventure opportunities; prefers active activities; flexibility of options; natural settings and experiences; socialising, meeting new people and maybe creating some trip opportunities.

Jane (aged 66) travelling from the United Kingdom with her husband. (International)

6.70 **Profile:** Jane and her husband have recently retired and are well placed to enjoy an active travelling retirement. Part of the travel motivation if family and they have been visiting their daughter in New Plymouth. They have known about some of New Zealand's travel highlights after researching the country when their daughter moved here. Being nature lovers who have engaged in rambling trips at times, the chance to explore some of New Zealand's natural places was a real opportunity. Milford Sound was always in their plans. They have used coaches to get to a few key hub areas around the South Island, from where they have undertaken shorter easy trips using a mix of provider transport and occasionally hire cars) for access. They are in Te Anau with a hire car for a few days and have done some short walks and e-bike rides.

6.71 **Activity context:** They are basing themselves in Te Anau primarily as a day trip base for visiting Milford. Jane's husband is a car enthusiast who has been looking forward to driving the Milford Road ever since he heard about its reputation for scenery and challenge.

6.72 Context of visits to Milford Corridor: Driving through but with plenty of stops so Jane's husband can take in more than just the road ahead. They like walking so have looked at possibly doing short-stop walks at several easier walking sites (e.g., Lake Gunn, Gertrude Valley, the Chasm) subject to being in time for their boat – possibly doing some walks on the way back.

6.73 **Context of visits to Milford Sound Piopiotahi:** Visiting a site highlighted in their research on New Zealand and taking the recommended boat trip.

6.74 **Key site interactions:** Short stops along the corridor and through the boat terminal.

6.75 **Visit sensitivities / outcome desires:** Do not mind sharing with others if experiences and services are good; want a natural feel to the experience; would hope not to encounter over development; flexibility driving; nice achievable nature walks/biking.

Frank (Aged 55) traveling from Australia with his partner. (International)

6.76 **Profile:** Frank's Kiwi friends at home had been recommending a repeat visit to New Zealand for years after he had travelled here for school sport when he was young. When some of his investments matured, he received a surprise bonus. He and his partner decided they deserved a break. New Zealand was handy and a bit familiar and they felt comfortable self-driving for short periods if required, so they decided to check it out. They did not mind spending a bit to have a good experience over a short time so took a coach tour through the highlights of the country. In Queenstown this included a trip to Milford Sound. It seemed like being a long day, but they were meant to be relaxing and the views looked like being great (compared to WA). In the end the 'Wow' overcame the long day in the coach.

6.77 **Activity context:** A programmed day trip from Queenstown on a tour coach as part of a larger New Zealand circuit.

6.78 Context of visits to Milford Corridor: Passing through the Corridor by coach on the way to Milford Sound but stopping at a few popular sites for short walks and photos.

6.79 **Context of visits to Milford Sound Piopiotahi:** Visiting a site highlighted in all their research on New Zealand.

6.80 **Key site interactions:** Short stops along the corridor and through the boat terminal.

6.81 **Visit sensitivities / outcome desires:** Open to meeting new people and socialising; prefer good facilities and services but relaxed about it; prefer good weather; seeing impressive views and landscapes; not feeling too tired on the coach.

Louis and Akiko (both aged 25) from France/Japan travelling by car around New Zealand (International)

6.82 **Profile:** This couple met while studying at the University of Canterbury. They have now finished now and are travelling around New Zealand while trying to work out what to do next. They haven't got much of a budget, but they've been working in Central Otago (with accommodation) over summer and have taken a long weekend to car camp and visit Milford Sound – something neither had got around to yet. They have driven through to Cascade Creek to camp and be well positioned to drive through to Milford Sound.

6.83 **Activity context:** A budget trip to Milford Sound to splash out on doing a kayaking trip.

6.84 **Context of visits to Milford Corridor:** Driving up the road and camping at Cascade Creek to set them up for an easy drive through to Milford, with a few side trip possibilities if there's time.

6.85 **Context of visits to Milford Sound Piopiotahi:** Never been before and only have limited time and budget to do so now.

6.86 **Key site interactions:** Cascade Creek campsite, the Lake Gunn Nature Walk and through to parking and kayaking from Deepwater Basin.

6.87 **Visit sensitivities / outcome desires:** Enjoy the freedom of camping; like meeting other campers and travellers; the adventure of kayaking on the famous Milford Sound; not spending too much; hoping for a nice day; don't mind other users or activities if not too many or too obtrusive (have heard planes can be noisy at the kayaking launch area) – as long as the natural scenery experience is special.

James (aged 22) travelling from Invercargill looking to affirm his connection to Milford Sound Piopiotahi. (Domestic)

6.88 **Profile:** James grew up in Christchurch and did not really know much about his Ngai Tahu heritage until attending University and getting involved in different iwi groups. Through learning there he discovered his family had a long heritage and connection to Murihiku. Digging deeper with kaumatua in Christchurch and by correspondence in Murihiku, he found that his ancestors were involved in many stories associated the Fiordland and the Southern Lakes areas, including travelling the 'Greenstone Trails' up into Westland. On the advice of kaumatua he flew to Invercargill to meet, and from there to drive up the road to Milford Sound Piopiotahi to experience some of the landscapes and start to better understand the stories. Later he is keen to follow some of the trail's footsteps along the Milford Track but only has time for a quick look at the areas right now.

6.89 **Activity context:** An exploratory slow trip up the Milford Corridor to Milford Sound Piopiotahi, stopping at some suggested points along the way (that he'd been told had special meanings), but just generally experiencing the journey and landscapes. The trip did not involve a boat cruise.

6.90 **Context of visits to Milford Corridor:** Driving through to Milford but stopping at places he had been advised about.

6.91 **Context of visits to Milford Sound Piopiotahi:** To explore the journey and landscapes of getting there to start to better understand the stories of his ancestors. A cultural journey more than a sightseeing trip.

6.92 Key site interactions: Various sites along the Milford Corridor and walking around the village area.

6.93 Visit sensitivities / outcome desires: To better understand the stories of his family and his connections to Murihiku; not really engaging with anyone else on this travel but happy to chat to anyone.

'OTHER' RECREATIONAL ACTIVITY VISITORS

6.94 These are visitors who are using sites around Te Anau, along the Milford Road Corridor or accessed through Milford Sound (i.e., via Deepwater Basin) for other usually private recreation activities. Those that are travelling as far as Milford Sound are typically not engaged in the predominant boat cruise activities there but are using the site to access other places or activities (e.g., fishing, hunting, kayaking etc). In that respect Milford Sound is effectively just an extension of the Milford Rod Corridor.

6.95 Optimising facilities and services to have the most authenticity possible will best generate positive visit experience outcomes. In addition to those aspects of authenticity listed earlier, here it would also apply to:

- how flexibility, equity and independence of access is acknowledged and maintained with respect to all appropriate visitor groups and in particular relation to general NZ Domestic and Local Domestic visitors (subject to core management requirements).

Annie and Henry (aged 65, 68) travelling from Hamilton to do the Milford Track. (Domestic)

6.96 **Profile:** This couple came to do a boat cruise at Milford Sound Piopiotahi on a South Island road trip soon after getting married but before the kids arrived. They always wanted to come back and see what was behind the Fiords by walking the Milford Track. Years of tramping trips in the upper North Island with friends and family kept the interest level up and retirement offered the time. Was also interested as they had read the book 'Greenstone Trails' years ago and were interested to actually follow one. While they came down specifically to do the Milford Track, they were also planning to spend a couple of days around Te Anau visiting the caves, e-biking the river track and doing a scenic helicopter-flight into Fiordland.

6.97 **Activity context:** A focus upon doing the Milford Track but also wanting other experiences in the area.

6.98 Context of visits to Milford Corridor: Starting the Milford Track from Te Anau Downs and then catching a shuttle out after finishing it (with a few short stops along the way).

6.99 **Context of visits to Milford Sound Piopiotahi:** Only to finish the Milford Track this time but to sightsee on a coach/shuttle back to Te Anau (including short stops).

6.100 **Key site interactions:** The berthing facilities for the boat off the Milford Track and then short stops on the coach/shuttle trip back to Te Anau.

6.101 **Visit sensitivities / outcome desires:** Do not mind other visitors if not getting in the way of desired experiences; enjoying the social opportunities along the way; completing a long dreamed of trip; enjoying new freedom and new activities; excitement of helicopter ride.

Gavin (aged 35) traveling from Te Anau and active hunter, tramper and fisherman. (Domestic)

6.102 **Profile:** Gavin has been recreating in Fiordland all his life and for the past 20 years has been particularly interested in hunting and fishing there. He started these activities in the local areas with his parents and other family, explored more with friends, and more recently started introducing his own young family to the outdoors.

6.103 **Activity context:** Usually day trips with friends to preferred sites/areas based on car travel and walk-ins, with occasional longer multi-day trips (sometimes with friends living further away) or more family-oriented day trips. Does trips to many areas in Fiordland and has occasionally used helicopters to get in.

6.104 Context of visits to Milford Corridor: Drive up it at times to use fishing spots along the Eglinton River, get access to backcountry hunting areas off it or to areas down the Hollyford, or to take the boat to Milford for trips.

6.105 **Context of visits to Milford Sound Piopiotahi:** Only occasionally to launch the boat (or take rides in others) from Deepwater Basin for fishing trips, or to access remote backcountry by boat or on occasion by helicopter.

6.106 **Key site interactions:** Mainly use a few key carparking areas for site access along the Milford Corridor (and/or down the Hollyford) or using the slipway/parking area at Deep Water Basin.

6.107 **Visit sensitivities / outcome desires:** Doesn't mind other visitors if not getting in the way of desired experiences; in most cases prefers areas with lower numbers of other people and/or activities; opposes any significant constraints to access as a local/ New Zealander (such as strict managed vehicle access); dislike the plane noise when at Milford; overall highly values the ability to regularly access the back-country areas via front country access points without any constraints that undermine his freedom/flexibility of access.

Laura (aged 24) travelling from Dunedin to climb in the Darrans (Domestic)

6.108 **Profile:** Laura got into tramping and climbing while at Otago University and has started making trips to the Darrans to make the most of the climbing opportunities while she finishes her PhD. She has visited many of the backcountry areas around Te Anau and the Milford Corridor on trips initially with friends from the University Tramping Club and more recently the Alpine Club, although she has not done the Milford Track.

6.109 **Activity context:** Usually day trips out of Homer Hut for bouldering or as a base for longer alpine climbs and traverses.

6.110 Context of visits to Milford Corridor: Driving up the road to access the Darrans from a base at Homer Hut.

6.111 **Context of visits to Milford Sound Piopiotahi:** Drove down for a look once when the weather prevented climbing.

6.112 **Key site interactions:** Primarily Homer Hut and the Gertrude Valley, with occasional explorations elsewhere (Lakes Marian and Adelaide, Key Summit, Tutoko Valley, Milford Sound etc)

6.113 **Visit sensitivities / outcome desires:** Does not mind other visitors if not getting in the way of desired experiences; in most cases prefers areas with lower numbers of other people and/or activities; would prefer fewer aircrafts around the tops and people wandering around near Homer Hut; meeting climbing challenges; sharing Homer Hut with friends and other climbers; freedom/flexibility of access.

Chris (aged 34) travelling with his partner and friends from Invercargill for another Tramp. (Domestic)

6.114 **Profile:** Chris and his partner have been active trampers around Southland for many years. They often make trips to Fiordland together, and sometimes with friends to revisit previous tramping areas or explore new possibilities. Trips around the lower Milford Corridor have included the Hut-Mistake Creek loop, Dore Pass and various routes in the Livingstone Mountains up to Key Summit. More recently they've also tried Packrafting in the Eglinton as well after seeing others doing it. They drive to access the key road ends connecting to their routes as it gives them flexibility. Car security hasn't been an issue most places they've gone but it's always a worry.

6.115 **Activity context:** On this trip they are taking friends on an overnight camping tramp around the Hutt-Mistake Creek circuit over U Pass. This is their typical type of backcountry tramping around Fiordland with few huts and usually considerable route-finding required once off the often-limited sections of marked track.

6.116 Context of visits to Milford Corridor: Driving to parking and/or campsites for starting trips from the Eglinton (and sometimes in the Hollyford).

6.117 **Context of visits to Milford Sound Piopiotahi:** Have visited it previously to check out the sights, and once went out in a friend's boat there.

6.118 **Key site interactions:** Smaller roadside carparking areas that give access to backcountry route options. Have camped occasionally at campsites in the valley to get early starts.

6.119 **Visit sensitivities / outcome desires:** Looking to avoid other visitors and crowds; prefer less developed facilities and sites; does not mind meeting occasional other trampers along the way; only occasionally bothered by aircraft (usually helicopters) as they avoid areas nearer the main flightpaths; aim to have mainly 'wilderness' types of trip experiences; usually incorporating social time with similar tramping friends.

Hans and Lottie (aged 36, and 31) from Germany travelling by campervan around New Zealand. (International)

6.120 **Profile:** Hans and Lottie are traveling around New Zealand in a campervan (self-contained). This has given them high flexibility in the places they can stay and activities they can do. They like discovering new places and experiences so have only researched basic information about campervan use in New Zealand, routes and the main places worth going. They often find out more about the best local sites by talking to other travellers or locals that they meet. Based on this sort of advice they have based themselves as Cascade Creek for doing a number of day trips around the upper Eglinton and to Milford Sound

6.121 **Activity context:** Exploring the best day use sites in the upper Eglinton from a campsite base and including a drive to Milford Sound for a boat trip.

6.122 Context of visits to Milford Corridor: Using Cascade Creek campsite as a base for trying a number of recommended local day trips (e.g., Key Summit, Lake Marian, Gertrude Saddle) and for driving through to Milford Sound.

6.123 **Context of visits to Milford Sound Piopiotahi:** Including a drive through to Milford Sound and boat trip into activities from their Cascade Creek campsite base. This was always a target trip in their preliminary plans for visiting New Zealand, with the rest learned about while travelling.

6.124 **Key site interactions:** Cascade Creek campsite facilities (not trying to Freedom Camp) and roadside carparks for longer day trips in the upper Eglinton Valley (including carparking at Milford) and the boat terminal.

6.125 **Visit sensitivities / outcome desires:** Happy to meet other camping travellers; prefer less developed facilities and sites; prefer options for variety of walks and activities – especially with high level natural features; always keen to experience some of the local hidden treasures.

Keith (aged 63) up the Corridor from Te Anau for a fish. (Domestic)

6.126 **Profile:** Keith has been fly-fishing the rivers of Western Southland for decades. Sometimes when the conditions are right, he heads up the Milford Corridor to fish the Eglinton River flats. It's easy to get to, stunning scenery and very quiet. Once he gets away from the road he usually has the place to himself with only the odd other fisher encountered. In more recent years has noted a few changes with new activities on the river like the occasional kayakers or pack rafters, but mostly it has stayed pretty quiet. He used to sometimes take his son and then later his grandkids up there to have a go as well. It feels like it is one of his places.

6.127 **Activity context:** Occasional day trips from Te Anau fishing the Eglinton River Flats.

6.128 **Context of visits to Milford Corridor:** Driving up the road and parking to access various reaches of the Eglinton River along the flats.

6.129 **Context of visits to Milford Sound Piopiotahi:** Has been there a few times and taken others there for visits but it is not somewhere he goes to often otherwise.

6.130 **Key site interactions:** Carparks at along the road and parking off campground roads or other tracks near the river. In younger keener days he had stayed at the old Cascade Creek Lodge and later camped at Knobs Flat, but now its only day trips.

6.131 **Visit sensitivities / outcome desires:** Enjoys the solitude of fly fishing the mountain rivers; does not mind a few encounters with others if not too many or too long; prefers more natural settings and the Eglinton is easy country to get around in.

CHANGING PREFERENCES

6.132 People visiting the Fiordland area are fundamentally attracted by the area's reputations for beautiful natural settings and associated natural experience opportunities (ranging from passive engagement through to specialised activities). This is considered unlikely to change significantly. However, within this overarching preference to experience 'nature' there are some visitor experience preferences that appear to have become more defined.

6.133 It can be generalised that over time that visitors to the Fiordland area will increasingly be seeking various combinations of the following:

- A greater sense of authenticity of experience,
- A stronger sense of environmental integrity of the setting they visit (both in terms of visual appearance and in terms of the actions and behaviours of service providers and site managers).
- An increased sense of caring and respect in the delivery of visitor experiences (a strong sense of genuine manaakitanga and kaitiakitanga being demonstrated by service providers, site managers and other visitors).
- Increased importance placed on learning and the quality, relevance and delivery of information/interpretation about the sites, settings and associated stories.
- A desire for a stronger 'sense-of-place' and personal connection with an area.
- A desire to feel a sense of (perceived) remoteness and natural authenticity.
- Greater diversity of settings and sites suitable for a range of experiences including more types of track options (levels of track quality, durations, loops, environments, and use modes such as walking, cycling, and shared paths).
- A desire to stay in the natural environment (a diversity in site/setting-appropriate accommodation options ranging from basic camping though to huts and lodges).
- A desire to be able to undertake emergent new activity modes (such as cycling, e-biking, mountain biking and e-mobility vehicles).
- For some a greater desire to participate and interact in an experience not just view something.

WORKING VISITOR TYPOLOGY

6.134 In the individualised form, these diverse visitor personas above are difficult to collate into more representative 'typology' groupings of visitors and visit types. Such summary classification is helpful for the purposes of proposal evaluations.

6.135 Due to disruptions in the form of flooding damage and later more significantly to the impacts of COVID 19 a planned field-research-based approach to establishing visitor typologies was impossible to implement (as very few visitors were actually in the area).

6.136 However, from a desktop research approach it was determined that a useful guiding typology can be based on refinement of the Department of Conservation's 'Visitor Groups' as originally

presented in its 1996 Visitor Strategy (DOC, 1996), supplemented by understandings from other research and review material analysed for the project (Table 19 overfeaf). These pragmatic working Visitor Groups represent generalised combinations of typically preferred activities, experiences, and settings along with typical associated behaviours. Conceptually and in content they are based on a long-term development from cumulative park management experience rather than from market segmentation studies.

6.137 These Department of Conservation Visitor Groups have provided useful practical context for the Department's statutory and operational planning for visitor management since then (including the current Fiordland national Park Management Plan, DOC 2007) and are still incorporated in the Department's Regional 10-year Conservation Management Strategies (CMS's).

6.138 In the most recently reviewed DOC CMS (for Wellington 2019) and the current Southland /Murihiku CMS (DOC, 2016) they were used in Tables of '*Prescriptions for the management of visitor management zones'*, with particular respect to defining 'Predominant Visitor Groups' for different setting, destination, and attraction types. Beyond the Predominant Visitor Groups a range of other corresponding management features were also defined as prescriptive guidance for application to each of the DOC setting types. There corresponding management features were aligned with the fulfillable needs and preferences of the respective visitor groups in the different settings. In summary these management features included guidance on appropriate:

- Descriptive site and area types.
- Site accessibility.
- Predominant visitor groups.
- Facility settings/types.
- Desired visitor experiences and interactions.
- Concession operations & management; and
- Aircraft management.

6.139 Looking more specifically at the Visitor Groups the following types have defined and used by DOC (Table 19, column 1) and can be refined here for wider recreational and tourism application (Table 19, column 2).

Table 19: Broad Visitor Group Typology

Visitor Groups – DOC Visitor Strategy (1996)	Recreation/Tourism Visitor Groups – as adapted for the MOP (2020)
• Short Stop Travellers	• Short Stop Attraction Visitors
• Day Visitors	• Day Experience Visitors
• Overnighters	• Frontcountry Overnight Visitors
• Backcountry Comfort Seekers	• Enabled Backcountry Visitors
• Backcountry Adventurers	• Active-Adventure Backcountry Visitors
• Remoteness Seekers	• Wilderness-Remote Experience Visitors
• Thrill Seekers	• Thrill Attraction Visitors

6.140 The groups listed in column 2 above represent acknowledgement that the original DOC groups need to be conceptually expanded to cater for a wider range of commercial recreation and tourism context. The terminology attempts to reflect this as does the content of the summary visitor group descriptions provided in Table 20 overleaf, in terms of the following factors:

- the setting used,
- the accessibility of the area and the nature of the visit,

- activities types,
- experience sought,
- the facilities and services required,
- make up of visitors and visitor numbers.

6.141 It is acknowledged that these Visitor Groups are subjective and highly simplified constructions for summary purposes, and that in reality some components may overlap across different individuals and activities, and that individuals may be considered participants in one Visitor Group on one day and another Visitor group on another. It all varies depending on the contexts of the activity – what it is, where and how it is undertaken. While very diverse in interests, particular visitor types do gravitate towards particular setting and activity offers.

6.142 When considering possible management changes at any particular site or sites, aligning any change proposals with the Visitor Groups illustrated will assist defining a more fine-grained assessment of positive and negative impacts.

Table 20: Summary Visitor Group Typology Features (derived from still active categories / terminologies first defined in the Department of Conservation Visitor Strategy, 1996)

Short Stop Attraction Visitors	
Activity setting	Use key attraction sites along main access routes as part of a short stop (<1hr) on a longer journey either to a larger defined visitor destination or simply from place to place. Sites may be located beside main highways or short distances off them along local access roads.
Accessibility	High vehicle accessibility with short visits (<1hr) associated with lunch/cup of tea break/toilet stop/stretch of the legs or a visit to a natural attraction. The more popular sites associated with high profile destinations or key routes would have more traffic variety.
Activity types	Seeking activities of a passive to mildly active nature such as short walks, picnicking, photography, sightseeing, nature appreciation, refreshment.
Main experiences sought	Seeking an “instant immersion” in nature experience, associated with a high degree of scenic value or historical interest. Also travel breaks.
Facilities/services required	Seeking a high standard of facilities and services, usually including car parks, toilets, easy tracks of short duration that cater for all ages and most abilities, picnic facilities, orientation/interpretation signs about the location, and sometimes food and beverage services.
Visitor numbers/composition	Represented by both domestic and international visitors including free and independent visitors. Sites used by short stop travelers receive high use compared with sites used by the other visitor groups.
Indicative site examples here	e.g., Knobs Flat, Eglinton Flats, Mirror Lakes, Homer Tunnel, Pops Lookout, The Chasm, Tutoko Bridge etc.
Day Experience Visitors	
Activity setting	Use a wide range of settings from urban fringes to backcountry walk-in natural areas. Day visits range from one hour to full day. This group often uses sites that are access points for the backcountry lands and waters such as road-ends, easy day walks or scenic attractions. They also often use water-based attractions (e.g., rivers, lakes, coastal areas etc.) or sites with significant natural features (e.g., crags, big walls, boulder-fields, gorges, river flats etc.) that offer quality achievable experiences. Can be significant commercial recreation involvement (guiding, transport, gear hire etc.)
Accessibility	High vehicle accessibility associated with a range of road standards, from gravel through to tar seal, and can involve significant travelling time to get there, but get close enough to allow sufficient activity time. Tracks used by this group are usually of a standard enabling use by relatively inexperienced visitors. Off-track activities are also more possible (e.g., fishing, hunting, bouldering etc.)
Activity types	Visits are typically associated with a family or group outing (e.g., picnics, swimming), engaging a specific recreational activity (e.g., walking, biking, mountain-biking, fishing, hunting, boating, paddling, packrafting, climbing etc.) or sightseeing (e.g., scenic walking, biking, boat cruise, aircraft trips etc.). Water is often a focus for the visit, be it at the coast, lakes or rivers. Commercially provided services also feature where the site setting, and activity features ensure higher quality experiences. Activity transport modes may also be a feature (e.g., e-bikes, jetboats, cruise boats, aircraft etc.).
Main experiences sought	Seeking fulfilling natural, social and/or activity-specific experience outcomes with a sense of quality, space, fulfilment and freedom. Most users doing respective different activities will be seeking quality fun experiences which may require particular site and/or facility features.
Facilities/services required	Seeking a high standard of facilities and services relative to respective desired activities, including carparks, wharves, boat ramps, toilets, tracks, picnic facilities, on-site orientation/ interpretation signs and also pre visit information about activities options and features of the site. This does not mean overdeveloped, but appropriate to the setting and activity

	types. Some activities will require no facilities except somewhere to park.
Visitor numbers/composition	Worthy sites used predominantly by day visitors in popular areas usually receive high use compared with sites used predominantly by the other visitor groups. Some sites associated with higher tourism flows will receive high international visitor numbers and seasonal domestic peaks while other lower profile sites in quieter areas will usually receive higher domestic numbers and mainly local users. These balances can change rapidly when 'word-gets-out' about something special.
Indicative site examples here	e.g., Milford Sound Piopiotahi (boat/plane trips), Brod Bay (picnics), Waiau River (floating, biking), Eglinton Flats (fishing), Key Summit/ Lake Marian, Gertrude Saddle (walking), Gertrude Valley (bouldering/climbing) etc.
Frontcountry Overnight Visitors	
Activity setting	Uses campsites and overnight accommodation at rural or backcountry drive-in sites accessible by vehicle. Sites may be accessible only by boat. This would include settlements/service centres providing accommodation along main access and transit routes in the natural areas (e.g., Knobs Flat in Fiordland National Park - would exclude at facilities in towns such as Holiday Parks, Hotels etc.).
Accessibility	The type of accommodation and the setting are often associated with a natural attraction that will determine the experience. The duration of the visit may be from one night to one or more weeks. These locations are often used as summer holiday spots year after year. Some non-commercial accommodation can also enable local area access (e.g., Deep Cove Hostel, Borland Lodge etc.)
Activity types	Camping is the predominant activity. At both campsites and overnight accommodation this group often undertakes a range of activities using the site as a base, including easy day walks, guided nature programmes, water-skiing, fishing, swimming, school trips etc. These opportunities can also be delivered from commercial accommodation where available in the setting areas (and might be associated with particular activities e.g., fishing).
Main experiences sought	This group seeks an overnight experience in a predominantly attractive natural setting. They expect both the camping/overnight experience, and the associated activities they undertake, to be generally low risk ones. Includes the traditional New Zealand family holiday experience. In some commercial cases a degree of luxury might be expected.
Facilities/services required	Seeking at least basic facilities and services with water supply and at least pit toilets (ideally better). Like day visitors, overnighters generally prefer a high standard of facilities (e.g., tracks, on-site orientation/interpretation signs) for activities where the site is used as a base. A few seek facilities such as cabins or powered caravan/campervan sites found at a small number of serviced campgrounds. If they're not familiar with the sites they're often looking for pre-visit information on booking arrangements, planning where to go, and on activities that can be undertaken in the area or on unique natural or historic features. Commercial accommodation users would usually expect higher standards.
Visitor numbers/composition	Visitors staying for one week or more tend to be mainly New Zealand family groups. These may often be repeat/regular site users. Most international visitors stay for only one night and can include those in campervans and other free independent travelers. During the peak summer period, use at most sites is high compared with low use for much of the year.
Indicative site examples here	e.g., Knobs Flat, Cascade Creek (including the old Cascade Lodge if still present), other DOC campsites, Te Anau Lakeside huts, Gunns Camp; Homer Hut; Deep Cove Hostel; Borland Lodge etc.
Enabled Backcountry Visitors	
Activity setting	Natural settings with generally the only modification being the facilities provided to enable multi day activity trips.
Accessibility	Largely foot access apart from where air and boat access are permitted and preferable in the time available or is a significant experience enhancement. Sites often require and have good links with scheduled transport infrastructure and options and have higher quality huts.

Activity types	The most common activity undertaken is independent (and some guided) tramping on the major tracks, with most trips taking 2 to 5 days. Other activities can include fishing and hunting (usually guided) that is occasionally associated with hut or campsite use, but more usually with charter boat trips.
Main experiences sought	Seeking an achievable and high-quality outdoor experience in a backcountry environment that has low risk due to the provision of safe, comfortable facilities. To ensure a safe, comfortable and rewarding experience this group sometimes uses commercial service providers. For many this may be their first introduction to the New Zealand backcountry. For many a degree of social contact with other participants and any staff encountered staff also enhances experiences.
Facilities/services required	Accessibility by less capable or time poor visitors is enhanced above normal backcountry standards. This is facilitated by the provision of well-constructed tracks, bridges, quality huts, staff (e.g., hut wardens, commercial guides) and backcountry campsites with associated facilities. Some tracks have guided walks services (with huts) in parallel to the public network. Charter boats provide activity bases for use of more remote coastal sites while aircraft can be used to access remote sites in the interior. Many unfamiliar with the areas or backcountry activities seek pre-visit information to help plan their trips, while most have enhanced experiences from the insights and stories provided by staff.
Visitor numbers/composition	On the more popular Great Walks there is usually a predominance of international visitors, although New Zealanders tend to be more represented on the less popular tracks on the more specialised commercially enabled hunting and fishing activity opportunities. Overall numbers can be high on the Great Walks, with virtually all spaces in the summer peak and shoulder seasons being booked out well in advance.
Indicative site examples here	e.g., The Milford, Routeburn, Kepler and Hollyford Tracks (independent & guided); charter boat, aircraft and water taxi serviced sites etc.
Active-Adventure Backcountry Visitors	
Activity setting	More remote natural settings (backcountry walk-in or remote) with only basic facilities at most.
Accessibility	Access is largely on foot except where air or boat access is permitted and preferable in the time available. This may apply for more specialised activities such as backcountry fishing, hunting or alpine pursuits. Foot access is on tramping tracks or routes.
Activity types	Visits generally range from 2 to 7 days (sometimes longer), but also can include day visits at times. Backcountry adventurers undertaking day visits can range further into the backcountry but do not require the standard of facilities sought by the day visitor group. Activities include tramping, hunting, fishing, mountaineering, cross-country skiing, rafting, kayaking, pack rafting, and backcountry mountain biking, activities with a high degree of self-reliance. Most regular activity may be day uses but with special longer trips occasionally.
Main experiences sought	The traditional New Zealand backcountry experience. This group has a higher level of backcountry skills and experience than Enabled Backcountry Visitors. They seek an experience that has challenge and a sense of freedom and they accept a degree of risk and discomfort. Preferences favour lower visitor numbers, fewer signs of development, minimal (if any) external intrusions (e.g., engine noise, other visitors arriving by boat/plane etc.).
Facilities/services required	Require only basic facilities maintained to appropriate standards for their preferred activities (for example, huts, tracks, bike rideable/accessible tracks, tent sites, essential bridges, route markers, limited signs). Charter boats and flights enhance access to many areas.
Visitor numbers/composition	Backcountry adventurers are generally young, male New Zealanders. It is difficult to estimate the numbers in this diverse and widely dispersed backcountry adventurer group but are usually relatively low.
Indicative site examples here	e.g., Hut-Mistake Creek Circuit; Lower Hollyford Valley; camps and traverse in the Darrans/Livingstone Range; Borland Road area; tributaries feeding Lake Te Anau etc.

Wilderness-Remote Experience Visitors	Extensions of above
Activity setting	Significantly overlapping with sites used by Active-Adventure Backcountry Visitors but in even more remote and undeveloped settings. Contains few or no facilities.
Accessibility	Access is largely on foot except where air or boat access is permitted and preferable in the time available. Foot access to the edge of remote/wilderness areas is usually by tramping track or route. Charter boats and flights enhance access to many areas.
Activity types	Visits range from 3 to 7 days (or longer). The main activities are tramping, hunting, fishing, mountaineering, kayaking, boating, all require the highest degree of self-reliance.
Main experiences sought	Seeking a wilderness experience with limited interaction with other parties. Seek the challenge and complete sense of freedom that comes from prolonged contact with wild nature. Preferences favour lower visitor numbers, fewer signs of development, minimal (if any) external intrusions (e.g., engine noise, other visitors arriving by boat/plane etc.).
Facilities/services required	Seek no facilities once in remote country. Charter boats and flights enhance access to many areas.
Visitor numbers/composition	This group is made up of fit, experienced, predominantly male New Zealanders. Compared with other visitor groups, remoteness seekers numbers are very low.
Indicative site examples here	e.g., as above plus large expanses of far Western, Northern and Southern Fiordland.
Thrill Attraction Visitors	
Activity setting	Activity suitable sites with a mostly natural backdrop, often with a dramatic element to them. The setting is often spectacular. Te opportunities are often commercially provided.
Accessibility	They are highly accessible using a range of transport (including aircraft) and may be close to major transport routes and/or settlements.
Activity types	Visits range from <1hr through to a long day, and involves exciting activities such as parapenting, rafting, bungy jumping, downhill skiing, downhill mountain biking, abseiling/canyoning etc. There is also an element of thrill seeking in some day-use and overnight backcountry activities such as kayaking, climbing, ski-touring, mountain biking, and such visitors should also be considered Active-Adventure Backcountry Visitors.
Main experiences sought	Seeking controlled risk activities as part of an exciting experience. These types of experiences may be specifically enabled for many casual and/or first-time participants through commercial services or engaged in privately by independently competent participants.
Facilities/services required	Usually using specialised sites, facilities and/or staff-support skills to enable doing the activity (either privately or commercially)
Visitor numbers/composition	High numbers of international Visitors are represented in this group where associated with tourism hotspots.
Indicative site examples here	There are virtually no such sites or activity offers around Fiordland, other than a incorporated into wider activity offers such as jetboating.

7 SHORTLIST OPTIONS

INTRODUCTION

7.1 This section presents outputs from the shortlisting listing stage of the project. The shortlist was drawn from a comprehensive long list of optimisation ideas and series of preliminary findings (Appendix 3). The section first describes the process undertaken to develop a shortlist list of options for the future of Milford Sound Piopiotahi from a tourism perspective, then it summarises these options along with the overall rationale upon which they are based and the potential impacts on recreationists, visitors and operators. Finally, additional comments are made on specific shortlist options. Additional detail on the shortlist options is contained in the other workstream reports.

7.2 Details from the baseline investigation stage that underpin much of the rationale are summarised in earlier sections of this report.

SHORTLISTING PROCESS

7.3 The process undertaken by the project team for moving from long list to short list is outlined below. The project pillars, objectives and purpose statement were referenced as guidance throughout the shortlisting process.

7.4 **Step 1 (Long listing):** The project team created a long list of ideas based on data and engagement discussions. Each idea on the long list was accompanied by a supporting rationale and commentary from other workstreams (refer Appendix 3).

7.5 **Step 2 (First Mana Whenua lens)**: Mana whenua provided the following items to ensure the project team had appropriate context regarding mana whenua perspectives before embarking on the shortlisting process:

- Project Report – Mana whenua Aspirations and Values
- Mana whenua Aspirations for Te Rua o te Moko video
- Te Tangi a Tauira (Iwi Management Plan)

7.6 **Step** 3 (First consultant screening): The Tourism, Conservation and Transport & Access workstreams conducted an initial review and evaluation of the long list ideas, adopting a scoring system (1= Don't support carrying forward to shortlist, 2= Have concerns, 3= Support carrying forward to shortlist).

7.7 Based on this evaluation, the three workstreams jointly recommended a set of ideas for carrying forward to the short list stage. These recommendations were reviewed and confirmed by the other workstreams in step 4.

7.8 **Step 4 (Second consultant review):** The remaining project workstreams reviewed and evaluated the long list ideas using the scoring system used in step 3. They also reviewed and confirmed the set of ideas to be carried forward to the short list stage and provided guidance regarding how these ideas could be further developed and/or any concerns mitigated.

7.9 **Step 5 (Develop/refine short list ideas):** Short list ideas were further developed and refined based on input from all workstreams, including via an all-workstreams workshop.

7.10 **Step 6 (Mana Whenua advice):** Mana whenua reviewed the short list and provided feedback to assist with further development and refinement.

7.11 **Step 7 (Governance Group & Project Working Group input):** The Governance Group and Project Working Group reviewed the short list and provided feedback to assist with further development and refinement.

7.12 **Step 8: (Confirm short list):** The short list was developed and refined further based on the feedback received from Mana Whenua and the Governance Group/Project Working Group.

7.13 **Step 9 (Ongoing refinement):** Short list ideas were continually refined and improved based on ongoing discussions and input from the project team, Governance Group and Project Working Group (this was an iterative process).

SUMMARY SHORTLIST OPTION DESCRIPTIONS

7.14 The following shortlisting options were progressed for consideration. Environmental sustainability underpins all thinking related to visitor infrastructure24.

MORE EXPERIENCE OPTIONS AT MILFORD SOUND PIOPIOTAHI

MAIN IDEA 1: DEVELOP A COMPELLING SUITE OF EXPERIENCES IN MILFORD SOUND PIOPIOTAHI TO ENCOURAGE VISITORS TO STAY LONGER AND CONTRIBUTE TO THE LOCAL ECONOMY

DEVELOP NEW WALKING TRACKS AND OBSERVATION POINTS IN MILFORD SOUND PIOPIOTAHI

7.15 These loop walks and observation points will afford views and cultural narration to Bowen Falls, Mitre Peak, Devils Arm, and rivers. A series of refuges will be developed at key locations to protect visitors in the event of a natural disaster.

ESTABLISH AN INTERPRETIVE MARINE CENTRE IN MILFORD SOUND PIOPIOTAHI

7.16 This facility is envisaged to play a key marine education role. It would be used to deliver / reinforce conservation messages and interpret the marine reserve. It would contain a range of open aquarium tanks containing fish, static and interactive interpretation displays, and audio-visual experiences. Business and employment opportunities will be available to Ngai Tahu, including in the delivery of mātauranga and kaitiakitanga.

INCORPORATE THE COMMERCIAL / RECREATIONAL PORT (DEEP WATER BASIN) INTO THE VISITOR EXPERIENCE

7.17 This idea links the existing commercial / recreational operations into the overall visitor experience (rather than attempting to hide this activity). Through a series of walkways and observation points visitors would be able to observe activity and have it interpreted but be kept at a safe distance. The potential also exists to leverage the fresh seafood story by serving seafood. The commercial and recreational boat operators would get a better physical environment (such as more trailer parking, better boat ramp, improved landscaping).

DEVELOP MULTIMEDIA EXPERIENCE BEFORE AND/OR DURING EXPLORATION (AUGMENTED WITH / SUPPORTING HANDS ON EXPERIENCES)

7.18 This interpretive approach would be integrated throughout the visitor experiences in Milford Sound Piopiotahi and be aided by the introduction of fibre and wifi into the corridor and Milford village.

[24] Environmental sustainability underpins all thinking related to visitor infrastructure. Costings make allowance for the inclusion of sustainability features and approaches. Structure would be built with energy efficiency and water reuse in mind. Natural materials would be sourced locally where possible and repurposing of the existing structures would be considered. Detailed investigation is required to determine the extent of the features to be included.

REDESIGN MILFORD VILLAGE

MAIN IDEA 2: REDESIGN MILFORD VILLAGE TO LIFT THE QUALITY OF THE BUILT ENVIRONMENT AND REFLECT ITS WORLD-CLASS STATUS

CREATE A COMPELLING SENSE OF ARRIVAL INTO MILFORD SOUND PIOPIOTAHI

7.19 A compelling sense of arrival can be achieved through better landscaping (naturally framing key viewshafts), clearing visual pollution and potentially the introduction of pou whakairo sculptural elements.

ESTABLISH A NEW MILFORD SOUND PIOPIOTAHI VISITOR HUB

7.20 This facility plays multiple roles serving as a place of arrival and departure (via bus), a location for booking visitor experiences, a place to eat, a refuge from inclement weather and natural hazards and a place to learn about the wonders of Milford Sound Piopiotahi. It also provides mana whenua a purpose-built space for active transfer of knowledge and use of cultural materials.

DEVELOP NEW VISITOR ACCOMMODATION

7.21 This accommodation at a minimum would serve walking tours and other Milford Sound Piopiotahi activities. It is envisaged as being a modest scale accommodation facility with 100 beds.

RELOCATE RESIDENT ACCOMMODATION

7.22 Establishing new resident accommodation would enable better quality, more compact housing to be developed in a safer location.

REDEVELOP THE TOURIST BOAT TERMINAL

7.23 This idea would see the existing boat terminal removed and replaced with a lower profile structure that serves as more of a “gate” than a terminal building. Use of the visitor hub for ticketing / validation speeds up the time visitors are waiting in this location. Retaining the existing terminal building is not advised as it would undermine the required functionality of a gateway terminal.

REVIEW POLICY REGARDING CRUISE LINERS IN MILFORD SOUND PIOPIOTAHI

7.24 This would involve advocating for the review of policies around cruise liners within Milford Sound Piopiotahi to potentially reduce perceived visual and environmental impacts, diesel smells and pollution risks and increase the financial contribution made by cruise ships to the local area.

REMOVE FIXED WING PLANE RUNWAY FROM MILFORD SOUND PIOPIOTAHI (VIA A PHASED WITHDRAWAL)

7.25 Undertake the phased removal in the medium to long term (for example with a 10-year notice period) of the fixed wing plane runway. This would free up additional space for other uses such as a realigned entry road, tracks, and helipads. The use of helicopters would remain.

ENHANCE MILFORD CORRIDOR OPTIONS

MAIN IDEA 3: ENHANCE THE MILFORD CORRIDOR EXPERIENCE TO EXPAND THE OPTIONS AVAILABLE TO VISITORS

CREATE A STRONG NATIONAL PARK ENTRY WHERE THE ROAD ENTERS FIORDLAND NATIONAL PARK

7.26 The objective of this idea is to clearly define the transition into Fordland National Park and give visitors a sense of crossing a threshold. This crossing over experience comes with an expectation on visitors that they will adopt appropriate behaviours when inside the park. The threshold could be marked in many different ways such as with sculptural elements, kūwaha matua entrance portal, signage and/or landscaping.

DEVELOP THE KNOBS FLAT EXPERIENCE NODE

7.27 Knobs Flat has the potential to be a key interpretive hub for the Milford Road experience. This could involve the development of a series of covered shelters containing interpretation displays,

pūrākau cultural narratives, interpretive nature trails, observation points and a network of loop tracks. Much of Knobs Flat is already highly modified but is close to forests of conservation value.

DEVELOP THE KNOBS FLAT ACCOMMODATION NODE (ONE OF THE EGLINGTON VALLEY ACCOMODATION NODES)

7.28 Because of its location and already highly modified environment Knobs Flat has the potential to become a key accommodation location along the Milford Road. With improved landscaping the site could be developed to accommodate tent and campervan sites and simple cabins. Potential also exists for a lodge to be developed and for cultural elements to be expressed via the built landscape.

CREATE A WHAKATIPU SUPER TRACK HEAD NODE WITHIN THE LAKE MARIAN CARPARK AREA

7.29 This iconic new visitor node would include interpretation, toilets, a shelter and new track sections. It centralises access, linking numerous longer tracks together. It also potentially facilitates access to a series of shorter walks and key observation points, such as Key Summit. For mana whenua it represents a modern reinstatement of the Whakatipu Trail and serves as a living classroom/wānanga for Ngāi Tahu. It recognises ngā ara tawhito trails which are an integral part of Ngāi Tahu culture.

7.30 Note: the super track head was initially proposed to be at the Divide. However, new data demonstrated that this was not a viable opportunity and an alternative location at the Lake Marion carpark was developed. The Divide has the opportunity to become a more focused short stop traveller site for interpretive purposes.

UPGRADE SHORT STOP OPTIONS ALONG MILFORD ROAD CORRIDOR

7.31 Increase the range and quality of short-stop areas that visitors can stop at. In most instances these sites are already established close to the road but lack appropriate interpretation, small loop tracks, viewing areas and cultural narrative. Improvements would be aimed at enabling greater accessibility for those with mobility restrictions (such as disabled, older adults and children). An objective would be to let the widest possible range of visitors feel the wairua of the place.

ENHANCE THE CASCADE CREEK CAMPSITE (ONE OF THE EGLINGTON VALLEY ACCOMODATION NODES)

7.32 Camping opportunities along the Milford Corridor are in high demand. Through improved landscaping and some additional infrastructure, such as toilets, existing camping opportunities can be expanded and enhanced at Cascade Creek. Because of flooding risks this site is not considered appropriate for other facilities (such as small cabins).

INVESTIGATE OPTIONS IN THE UPPER AND LOWER HOLLYFORD VALLEY

7.33 In appropriate locations minimal impact road end/track enhancements, extensions and/or new tracks could be established. This could form part of reconnecting the Whakatipu Trail. It also links to the idea of creating a Whakatipu Super Track Head Node.

HOMER TUNNEL PORTAL (SHORT STOP)

7.34 This strong, well-engineered observation portal (sheltered from rock and avalanche risks) would offer a safe viewing location on the Milford Sound Piopiotahi side of the Homer tunnel. It would offer good sightlines over alpine environment and into Milford Sound Piopiotahi and the best opportunity for passive (non-interactive) observation of kea.

DEVELOP TE ANAU HUB ROLE

MAIN IDEA 4: DEVELOP TE ANAU AS A SUB-REGIONAL VISITOR HUB TO ENCOURAGE MORE VISITORS TO STAY OVERNIGHT

REDESIGN THE TE ANAU WATERFRONT AND TOWN CENTRE.

7.35 Making as much as possible of the Te Anau waterfront and town centre assets; this idea could see the development of such things as lakefront hot pools, walking and cycling paths and new

landscaping. Initiatives would be designed to improve the year-round experience for residents and visitors alike.

CREATE NEW WALKING/CYCLING TRACKS CONNECTING INTO TE ANAU

7.36 This concept would build up the range of supplementary walking and cycling experiences (of different durations) that visitors could undertake from the town. The objective would be to strengthen the range of Te Anau based experiences on offer and encourage visitors to see the town as a regional accommodation and experience hub. This would lead to visitors both basing themselves in Te Anau and staying for longer.

DEVELOP A TE ANAU TRANSPORT HUB/BUS INTERCHANGE (AS PART OF A TE ANAU HUB)

7.37 This hub is essential for providing the starting point for a bus focused visitor transport model into Milford Sound Piopiotahi. It would enable rental and private vehicle numbers into Milford Sound Piopiotahi to be lowered and visitor access to be spread out more evenly throughout the day, giving a better experience and strengthening Te Anau as a regional accommodation hub.

DEVELOP A MILFORD CORRIDOR AND MILFORD SOUND PIOPIOTAHI EXPERIENCE HUB IN TE ANAU (AS PART OF A TE ANAU HUB)

7.38 This hub would deliver visitors information on Fiordland's cultural significance, history, natural environment, geology and conservation. It would contain static and interactive interpretation displays, audio-visual and guided experiences. It plays an essential role anchoring the start of the Milford Sound Piopiotahi experience in Te Anau. It would be an attraction in its own right and be joined to the Te Anau transport hub/bus interchange. It would work in synergy with the proposed Milford Sound Piopiotahi Visitor hub.

DEVELOP NEW FAMILY-FRIENDLY EXPERIENCES AROUND THE BROD BAY CAMPSITE

7.39 As part of a drive to strengthen Te Anau as a visitor hub, existing nearby sites such as a Brod Bay campground could be developed further into family friendly short stay or short stop experiences. This would see the potential inclusion of additional short loop walks, toilets, observation points, a forest observation tower, and linkages to adjoining sites of interest, such as the Hidden Lakes.

DEVELOP NEW ACCESS MODELS

MAIN IDEA 5: DEVELOP NEW ACCESS MODELS TO MANAGE VISITOR FLOWS

MIXED ACCESS MODEL A

7.40 This model is largely public transport focused with a mix of tour coaches, hop-on hop-off and non-stop buses designed to support a more immersive visitor experience on both the Milford Road and in Milford Sound Piopiotahi. Low or zero carbon buses would be used.

7.41 However, under this model some self-drive visitor parking would still be retained at Milford Village (potentially 60% less than current levels) and along the Milford Road corridor. Access to parking at key visitor locations could be balloted and/or priced in advance of arrival to reduce congestion. Those camping or staying at accommodation would also be allowed private vehicle access.

7.42 Tangata whenua and recreationists that require private vehicles (such those with boats, heavy equipment, or hunters) would be provided access.

7.43 New infrastructure improvements to the road corridor would be required to facilitate safer overtaking/stopping to accommodate larger visitor numbers to destinations along the corridor.

7.44 A cap on hourly visitor arrival numbers would be adopted to relieve congestion in Milford Sound Piopiotahi and spread visitor numbers more evenly across the day. This key intervention, along with the experiential changes outlined above, would enable continued growth in visitation while improving the visitor experience and preserving place values.

MIXED ACCESS MODEL B

7.45 Under this model the vast majority of visitors would be required to access Milford Sound Piopiotahi and the Milford Road corridor via bus (with some limited exceptions where this is

entirely impractical). This is a public transport model focused on a mix of tour bus, hop-on hop-off and non-stop buses designed to support a more immersive visitor experience on both the Milford Road and in Milford Sound Piopiotahi. Low or zero carbon buses would be utilised.

7.46 Under this model no self-drive visitor parking would still be retained at Milford Village. Those camping or staying at accommodation would be allowed private vehicle access only as far as their pre booked accommodation location.

7.47 Tangata whenua and recreationists that require private vehicles (such those with boats, heavy equipment, or hunters) would be provided access.

7.48 Mixed Access Model B includes the hourly arrival cap on visitor numbers outlined in relation to Mixed Access Model A.

TOURISM SUPPORTS CONSERVATION

MAIN IDEA 6: USE TOURISM TO IMPROVE CONSERVATION

7.49 Charges could be applied to support a broad range of conservation and land management initiatives. These initiatives would likely include predator control, the reintroduction of native fauna, weed management, mana whenua narration costs, and conservation research into key ecosystems and species. Charges could also be used to support the visitor experience in areas such as infrastructure maintenance and visitor interpretation.

IMPROVE GOVERNANCE

MAIN IDEA 7: NEW GOVERNANCE AND MANAGEMENT STRUCTURES

DEVELOPMENT AND MANAGEMENT DECISIONS COULD BE LED BY ONE GOVERNANCE GROUP

7.50 In order to streamline management and development decisions associated with Milford Sound Piopiotahi and the Milford Road corridor, a single governance entity could be established.

SHORTLIST TABLES

7.51 Table 21 sets out additional detail on the shortlist options. Table 22 outlines the potential impacts the options may have on recreationist, visitors, and operators (in accordance with the client's brief). The impacts on Mana Whenua are not addressed directly in this section. The reader should consider Mana Whenua perspectives in the workstream three report. It is essential that Mana When impacts be considered further in all future planning and feasibility assessments.

SHORTLIST – OPTION DETAILS

7.52 This section outlines specific short list ideas for change in relation to the five main themes, develop new transport models to manage visitor flows, develop a compelling suite of experiences in Milford Sound Piopiotahi to encourage visitors to stay longer and contribute to the local economy, redesign Milford Village to lift the quality of the built environment and reflect its world-class status, enhance the Milford corridor experience to expand the options available to visitors and develop Te Anau as a sub-regional visitor hub to encourage more visitors to stay overnight. A series of items are listed under each theme. The shortlist was approved for further consideration in the master plan by the project Governance Group.

Table 21: Shortlist – Recreation / Tourism Development Options

ID	Item	Description	Specification	Rationale
1	**Develop new transport models to manage visitor flows**			
1.1	Mixed access model A Note: The Transport Workstream report contains a full summary of transport models.	Most visitors are accessing Milford Sound Piopiotahi / Corridor via coach / bus. Retaining some visitor parking at Milford Sound Piopiotahi (≈60% less than current) with access balloted and/or priced. Sends strong signal to use bus model as parking likely to book out a long way in advance. Includes: - Low/zero carbon coaches. - Terminal integrated with visitor hub in Te Anau. - A series of stops along the way. - Discreet Milford Sound Piopiotahi terminal integrated with visitor hub. - Safety & resilience improvements on the Milford Road. - New infrastructure improvements to the corridor facilitating safe overtaking/stopping to accommodate larger numbers to destinations along the corridor, integrating active mode low impact infrastructure (ideally iconic design elements) - Hourly cap on visitor arrivals to relieve congestion and smooth visitor flows across the day.	- Public transport model focused on a mix of tour coach, hop-on hop-off and non-stop buses designed to support a more immersive experience on both the Milford Road and in Milford Sound Piopiotahi Could be implemented either under the Public Transport Operating Model; consortium; franchising or public sector operation. - Some limited priced and rationed visitor parking retained in Milford Sound Piopiotahi.	- Deliver the transport outcomes in the Milford Opportunities Project pillars and objectives, - Provides New Zealander's flexibility to self-drive if they have booked parking in Milford Sound Piopiotahi, - Provides for the needs of recreationists with heavy equipment, - Removes vehicle congestion in key nodes, - Generates revenue and employment, - Strengthens the role of Te Anau as an access hub, - Helps spread the visitor arrival peaks in Milford Sound Piopiotahi.
1.2	Mixed access model B Note: The Transport Workstream report contains a full summary of transport models.	All visitors required to access Milford Sound Piopiotahi via coach / bus (with some limited exceptions where this is entirely impractical). Mixture of tour-style, hop-on, hop-off bus model to encourage a more immersive visitor experience on the Milford Road and in Milford Sound Piopiotahi with longer stays. Includes elements listed above. Exceptions/overlays for bike-friendly days (e.g., events)	- Public transport model focused on a mix of tour bus, hop-on hop-off and non-stop buses designed to support a more immersive experience on both the Milford Road and in Milford Sound Piopiotahi/ Milford Sound. Could be implemented either under the Public Transport Operating Model; consortium; franchising or public sector operation.	- Deliver the transport outcomes in the Milford Opportunities Project pillars and objectives. - Provides for the needs of recreationists with heavy equipment, - Removes vehicle congestion in key nodes, - Generates revenue and employment, - Strengthens the role of Te Anau as an access hub, - Helps spread the visitor arrival peaks in Milford Sound Piopiotahi.
2	**Develop a compelling suite of experiences in Milford Sound Piopiotahi to encourage visitors to stay longer and contribute to the local economy**			
2.1	Develop new walking tracks and observation points	**Location:** Milford Sound Piopiotahi x 4 locations:	- Walking tracks to a minimum of Short Stop Traveller walking track standard (see SNZ HB 8630:2004). Some areas may require an "Urban Path"	- Hazards mitigation: Hill behind MP Lodge would be good tsunami evacuation route. Hill behind cruise terminal also an option.

ID	Item	Description	Specification	Rationale
	in Milford Sound Piopiotahi	• at the rear of the proposed hub facility (behind the existing hotel site (lookout track), • along the waterfront (avoiding interference with estuarine environment where possible). • to Bowen Falls (subject to hazard mitigation[25]), • Across the delta towards Deep Water Basin. **Function:** Primarily focused on short stop visitors with walks ranging from 10 – 60 minutes (although multiple linked tracks can enable longer walks). Walks / observation points should afford view shafts to Bowen Falls, Mitre Peak, Devils Arm and rivers (which are the most important views from a mana whenua perspective). **Form:** Loop tracks are optimal so perceived crowding can be reduced. A minimum standard would be DoCs short stop traveller track standard. This will enable wheelchair access in most locations. Structures will be developed as required to navigate certain obstacles. A series of tsunami refuge shelters will be required x 4. **Scale:** lengths range between 100m-4km with observation points for circa 20-40 people (depending on proximity to trail head – larger closer to access point).	standard around key infrastructure / track heads. - Estimate 5,000m of new/upgraded track (associated infrastructure – boardwalks, stairs and bridges TBC) - Estimate 4 refuges (within Milford Sound Piopiotahi). - Tsunami shelter behind proposed hub facility with smaller shelter(s) aligned to walking /observation elsewhere e.g., in or near Cleddau delta. - Consider Bowen Falls 'gondola' / access investigation. - Consider the informal tracks that form a quasi-network around the village (known by staff) (use if viable). - CDEM facilities located based on evidence of effective risk/harm management.	- Mana Whenua: support Bowen Falls track and showcasing key viewshafts. - Mana Whenua: A place to stand on the whenua and experience the wairua. - Enables greater numbers of people to spread out avoiding crowding. - Delivers a richer variety of experiences. - Improves the connectivity of the site.
2.2	Establish an interpretive Marine Centre in Milford Sound Piopiotahi	**Location:** In Milford Sound Piopiotahi as part of the visitor hub (or collocated). **Function:** Education and orientation role (directs visitors to other experiences). Potential revenue opportunity. **Form:** Indoors, shallow 'touch' / view tanks, interpretation (static and digital), views of sea.	- Looking at an average 30-minute base experience (with the opportunity for higher value bolt on experiences such as guided tours/audio-visual. Assume 500 pax every 30 mins. - Schedule: • Gallery 650m^2 (black box high stud) – icon architecture	- Highlights the Milford Sound Piopiotahi point of difference compared to the corridor experience (marine environment). - Provides an indoor experience during inclement weather. - Can be used to deliver / reinforce conservation messages and interpret the marine reserve.

[25] . In time "the top falls link" to Bowen falls should also undergo detailed feasibility investigation (possibly after simpler observation opportunities for Bowen Falls have been explored and if viable implemented).

ID	Item	Description	Specification	Rationale
		Cultural elements integrated into any research mandate. **Scale:** Estimated GFA 950m^2 front of house (TBC). Size depends on approach and final hub and transport model.	• Audio-visual / seminar room –80m^2 • Viewing room with interpretation / touch tanks (views over water, light, high stud) 200m^2 • Office 20m^2 • Plant room / back of house / loading dock 40m^2 • Assume shared foyer, toilets and some additional back of house etc with visitor hub. • Note: excludes scientific labs at this stage as it is more visitor focused.	- Potential for revenue generation. - Mana whenua: employment benefits Ngāi Tahu communities, strengthening the economic resilience of Papatipu Rūnanga - Mana whenua: A pathway for cultural heritage and the expression of tino rangatiratanga and Kaitiakitanga in Te Rua o te Moko.
2.3	Incorporate the Commercial Port (Deep Water Basin) into the visitor experience	**Location:** Milford Sound Piopiotahi Commercial Port (Deep Water Basin). **Function:** Ties existing commercial operations into the overall visitor experience (rather than attempting to hide this activity). Leverages the fresh seafood story. Importantly the design will separate visitors physically from recreational boating and commercial port activity. The visitors will be encouraged to observe from a safe distance. Commercial and recreational boat owners would have additional space and trailer parking. **Form:** Walking tracks, raised observation area and potentially catering caravan (and landscaped eating area). Scale: Light touch – under 100m^2 (links with 2.1). Administration of a public boat ramp is incorporated into the design, and potential community facilities.	- Reorganise and tidy the existing commercial areas (sea and land side). - Develop raised viewing area that links with walking tracks (views down over the recreational boat ramp and deep-water wharf / jetties. - Elongated raised viewing area 10m x 3.5m (GFA 35m^2) - Seating area 40m^2 with 20m^2 rain shelter (open on two or three sides – potentially with insect screens). - Food caravan hard stand 25m^2 - Tracks included in 2.1. - Interpretation panels. - Relocate sea kayaking operations with a separate ramp / service area. - Licencing arrangements consistent with integrating management with local park-user clubs, such as local boat clubs and the Milford Community Trust to create a sense of local community. - Development to be contained within already modified / built areas. - Additional trailer parking and improved boat ramp.	- Enables visitors to observe activity and have it interpreted but keeps them at a safe distance (improves safety). - Tidies up the commercial port visually. - Provides more functionality for recreational boats. - Creates a value-add visitor opportunity (commercial hospitality opportunity). - Supports tourist kayaking opportunities.
2.4	Develop multimedia experience before and/or during exploration (augmented with /	**Location:** Various locations (hubs – Milford Sound Piopiotahi & Te Anau). **Function:** Interpretation / education / safety roles. Technology is used to support /	- Mix of multimedia interpretation. - built facilities and app-based initiatives for phones. - Opportunity also to link with on-bus experiences.	- Not all visitors can experience value added experiences (because of time and cost constraints). Therefore, benefit exists in laying a base understanding of Fiordland and Milford Sound Piopiotahi for the visitor.

ID	Item	Description	Specification	Rationale
	supporting hands on experiences)	reinforce hands on experiences (guided and creative activities). **Form:** Interpretation spaces and mobile apps. Supporting hands-on guiding. **Scale:** Various scales to suit market requirements.	- On-line experience drives additional visitor nights in Te Anau. - Link with overall brand strategy.	The visitor should be enabled to view the landscape through a Ngāi Tahu cultural lens. - This interpretive foundation delivered through a multimedia approach can be built on further if visitors choose to undertake a higher value bolt-on experience (normally a guided experience of some form). - additional opportunities for multi-sensory/ active/hands-on storytelling (e.g., making, setting, clearing fish traps) can be provided. this endorses the intangible and tangible cultural heritage of Ngāi Tahu - the amount of in-person storytelling can be increased as capability grows, delivering benefit to Ngāi Tahu communities. - On-line experience should also result in safer outcomes/enhanced visitor experiences by improving travel planning to ensure visitors are better prepared to avoid or accommodate adverse weather.
3	**Redesign Milford Village to lift the quality of the built environment and reflect its world-class status**			
3.1	Create a compelling sense of arrival into Milford Sound Piopiotahi	**Location:** Milford Sound Piopiotahi **Function:** Create a stronger sense of arrival. **Form:** This can be achieved through better landscaping (framing key viewshafts), clearing visual pollution and potentially sculptural elements. **Scale:** Localised at key locations.	- Mana Whenua would like the ability to put in appropriate artworks and favour a natural framing of key viewshafts (alignment of road / natural plantings to frame views and obscure built elements).	- Mana whenua perceive runway land is best used to frame a sense of arrival. - Ngai Tahu identity expressed in the (built and natural) environment. - Recognition of Tū Te Rakiwhanoa and Hine Tītama. - Re-align highway to optimise sense of arrival/reveal. Would require removal of runway.
3.2	Establish a new Milford Sound Piopiotahi Visitor hub (including visitor safety features).	**Location:** Existing raised old hotel site (general area). **Function:** Centralise people in the safest location and direct them from here. Serves as the main transport, education, and orientation hub. Also, a place where people can relax, eat and shop. **Form:** Solid structure able to offer protection from natural hazards. **Scale:** TBC but not small (depends on transport model)	Assumptions: - We base the hub building on the 2060 visitation figures (from Fresh Info), - Peak hour in Feb 2060 is estimated at 1,261 pax (with demand management practices in place) - Assuming a three-hour dwell time at Milford Sound Piopiotahi (given what we are doing in the corridor etc). - 2060 peak site load is 3,783 pax, - These are assumed to be split at any given time as: - Boat 2,000 pax,	- Places people in the safest general waterfront location and creates a large site refuge (facility located against landform), - Provides the best location for circulating visitors around Milford Sound Piopiotahi - Central hub enables downsizing cruise terminal to now serve only as a gateway. - Mana whenua desire for a purpose-built space for active transfer of knowledge and use of cultural materials in situ. - This model can flex depending on the demand for certain experiences.

ID	Item	Description	Specification	Rationale
			- Hub 1,000 pax - site walking / other activities outside 783 pax. - Hub internal GFA = 1,800m^2 (1.8m^2 per person) - External covered 500m^2 - External hard landscaping TBC	- Development is contained within already modified / built areas. - The cultural identity of Ngai Tahu is to be expressed in the built environment. - Sustainable practices are to be promoted and supported, and considered ki uta ki tai, within te hauora o te taiao (the wellbeing of the environment).
3.3	Develop new visitor accommodation	**Location:** Co-located with visitor hub. **Function:** As a minimum must serve walking tours and other Milford Sound Piopiotahi activities (i.e., higher end quests). **Form:** Could be simpler hotel style. **Scale:** TBC but likely to be circa 50-100 beds (circa GFA = 1,540m^2)	- Assuming 100 bed lodge / hotel (2 pax per room) or 50 rooms. Mainly to replace existing accommodation which will be demolished. - GFA = 1,540m^2 (25m^2 per room x 50 rooms, services 150m^2 , 15% circulation or 140m^2, (excludes commercial kitchen which is in hub). This is a 3.5 -4.5 star / eco experience type facility (Feasibility analysis required to determine specifications / viability and operational model). - Development contained within already modified / built areas.	- Consolidating accommodation preferred from conservation and hazards perspectives. - Located against landform, so not to obstruct views towards the harbour - Mana whenua supportive of high-quality development that is befitting of the 'masterpiece' and gives back to the environment. - Ngai Tahu is to be provided all opportunities to operate commercial activities in its takiwā. - Maintains existing visitor service levels in terms of capacity.
3.4	Redevelop tourist boat terminal	**Location:** Freshwater basin. **Function:** Serves as more of a "gate" than a terminal. Use of the centralised hub for ticketing / validation etc should reduce time on site. **Form:** Simpler shelters with a low profile. **Scale:** Length of wharf (but far smaller footprint than the existing terminal).	- 500 -600 pax accommodated at any one time. - GFA of 600m^2 - Low level shelter covers wharves and wharf base.	- Enables small structure (less height) – rain protection. - Reduces dwell time in rockfall and potential tsunami area. - Enables sustainable transport link between hub and terminal/gate. - Aligns with mana whenua perceptions of best point for water/land (blue green) connection. - Built environment expresses Ngāi Tahu identity
3.6	Review policy regarding cruise liners in Milford Sound Piopiotahi	**Location:** Milford Sound Piopiotahi. **Function:** Potentially reduces visual and environmental impacts of cruise ships, diesel smell and pollution risk. **Form:** Ban or tighter exclusions (conditions). **Scale:** Ranging from partial to full exclusion.	- Options include total exclusion, or restrictions/controls (e.g., re size of vessel, environmental impacts, timing/seasonality, numbers). - Potential exists to extract higher revenue from cruise which is invested back locally into conservation / biosecurity / heritage projects.	- Multiple environmental concerns in relation to cruise generally but environmental concerns in relation to Milford Sound Piopiotahi specifically are not well understood (limited evidence base). - Cruise currently funding coastal heritage project (but no evidence this funding could not be found elsewhere).

ID	Item	Description	Specification	Rationale
				- Cruise is likely underpaying for the experience being delivered. Little financial value is being delivered locally. - Mana whenua neutral but note benefits to local tug operators and want to preserve ability to experience the sounds by water. Prefer cruise ships in Milford Sound Piopiotahi to elsewhere on Southland coast -- view shared by conservation. - Mana Whenua request an environmental impact assessment for Cruise Ships. - There may be other Fiords where visually cruise ships could be better absorbed than in Milford Sound Piopiotahi, but this could lead to a sprawl of effects, in particular as they relate to the remoteness and natural character of the fiords.
3.7	Remove fixed wing runway from Milford Sound Piopiotahi (Phased withdrawal).	**Location:** Milford Sound Piopiotahi aerodrome. **Function:** Phased removal (e.g., 10 years notice period) of the fixed wing runway to free up additional space for other uses - entry road, tracks, helipads. **Form:** Removal of tarmac, realign road and potentially revegetate some areas. **Scale:** Removal of most of the runway (potentially retaining enough for rotary at river end).	- Potentially re-alignment of highway to optimise sense of arrival/reveal would require removal of runway. - Part of the runway at the river end could be retained for helicopters.	- Mana whenua: Runway land is best land for sense of arrival. Ngai Tahu has ROFR on this land (s. 9.3 DOS). - Runway severs connection between visitor hub site and Deepwater Basin. - Long lead time for phasing out fixed wing would allow operators time to adjust and plan for withdrawal. - Landings are risky, esp. with AFIS gone. - Need multiple helicopter pads for both tourism and emergency work. These could be retained on part of the former runway (river end). - Provides an opportunity to expand areas of native vegetation including providing habitats that are of importance for some species e.g., Milford boulder butterfly. - Rotary potentially less visually intrusive depending on flight paths. - Additional discussion is provided at paras 9.12-9.40.
3.8	Relocate and/or redevelop resident accommodation	**Location:** Milford Sound Piopiotahi - Village.	- Higher quality more aligned with a higher density urban housing / student accommodation typology (more condensed footprint).	- Move from existing location to address hazard risk.

ID	Item	Description	Specification	Rationale
		Function: Minimise environmental and visitor impacts and improve safety of residents. **Form:** Higher density longer term housing units over a tighter footprint (multi-level dwellings). **Scale:** TBC circa 5,200m^2 for 300 residents (mixed accommodation types).	- Assumes 300 residents (at peak). A combined GFA of circa 5,200m^2 (Long and short stay / singles and couples). Including spaces such as: • Single Rooms (without Bathroom) • Kitchens / Dinning • Toilets/shower • Double Bunk Room (with en-suite) • Single Room (with en-suite) • Apartment (1 bedroom) • Social Space for all residents • Plant Rooms	- Centrally manage staff accommodation enabling higher quality standards and common facilities (more aligned with a higher density urban typology). - More condensed footprint. - Co-locate with hub precinct. - Develop sense of community and civic cohesion. - Ngai Tahu is to be provided opportunities to operate commercial activities in its takiwā.
4	**Enhance the Milford corridor experience to expand the options available to visitors**			
4.1	Create a strong National Park entry threshold (Gateway Nodes)	**Location:** Current National Park Boundary or at the start of the Eglinton Valley. **Function:** To clearly define the transition into Fordland National Park and its associated values, experience opportunities and expected behaviours, **Form:** Strong but setting/context appropriate signage/visual gateway marker/structures. These can be allied to priority interpretive themes. **Scale:** TBC depending on access model. Option 1: Large threshold markers (alone) 'drive through. Option 2: Large threshold markers with more complex range of support facilities (additional interpretation, toilets, parking etc). Pause or stop.	- An entrance/barrier may need to be incorporated according to access model selected. - TBC with access model.	- Important from a visitor management perspective (sense of crossing threshold), - Management tool with entrance/barrier option. - Ngāi Tahu Whānui and manuhiri are to have a point of experiential 'arrival' at both the National Park and Milford Sound Piopiotahi.
4.2	Develop Knobs flat experience node	**Location:** Knobs Flat (current and already altered/cleared footprint area – minimal additional impact). Consider linkages and use of Kiosk Creek (as part of a wider precinct). **Function:** Key interpretive hub for the Milford Road experience (allied to 4.3, linked to 1. Access models, 1 and generally across 4. Enhance Milford Corridor experience). Can work as guided or unguided experiences. **Form:** Interpretive structure/s that link into short walks and interpretive nature trail at	- Interpretive structures circa 200m^2 GFA in total (enhanced capacity to absorb more visitors). - Could be structures separated into 3-dispersed or clustered modules. - Walking tracks to a minimum of Short Stop Traveller walking track standard (see SNZ HB 8630:2004). Some areas may require an "Urban Path" standard around key infrastructure / track heads.	- Key base for guided experiences (within the corridor). - Serves as a stop for those on a coach (main corridor interpretive node so dwell time may be longer than other sites along the corridor). - Still enables a DOC research base to be maintained (with additional amenity). - Links with Knobs Flat accommodation. - Mana whenua should feel connected to their whakapapa, whenua and heritage

ID	Item	Description	Specification	Rationale
		back of site, links to wider walking/cycling trail network, potential for low-key F&B e.g., food cart. **Scale:** Structures circa 100-200m^2 GFA. Trails TBC.	- Combination of tracks, boardwalks, stairs, and bridges are likely to be required) - Interpretation. - Toilet infrastructure required. - Sensitive development that is carefully designed to minimise indirect effects of noise, lighting, pollution etc. on indigenous fauna and nearby habitats.	when in Milford Sound Piopiotahi, both day and night. - Plus points above – sustainable practises, Ngāi Tahu in the built infrastructure, continuation of cultural practise.
4.3	Develop Knobs Flat accommodation node (Eglinton Valley Accommodation Nodes)	**Location:** Knobs Flat (current & already altered/cleared footprint area - minimal impact) **Function:** Enhanced multi-option accommodation base along Milford Road (allied to 4.2 and linked to 1. Access models, and generally across 4. Enhance Milford Corridor experience). **Form:** Low impact but enhanced and environmentally appropriate accommodation (tenting, campervans sites and low-key simple cabins). Improved landscaping and some 'extra' facilities (i.e., wifi capacity, park & ride base capacity) to enhance site attractiveness. Potential for a lodge on the Kiosk Creek side of the precinct depending on commercial viability. **Scale:** Similar footprint and low-key visual impression as current site (stay within modified footprint), but enhanced capacity to absorb visitors through better landscaping.	- Cabins: Circa internal GFA of 15-25m^2 + external covered deck x 10-15 units. Use shared facilities (units small enough to be relocatable). - Shared kitchen space and facilities circa 50m^2 GFA plus external eves for peak use expansion. - Grass campsites: circa 25 -35m^2. Numbers TBC - Campervan sites: metal circa 35-40m^2. Numbers TBC - Cabins. Numbers TBC. - Parking space adjacent. - Lodge TBC -- could be at Kiosk Creek. - Sensitive development that is carefully designed to minimise indirect effects of noise, lighting, pollution etc. on indigenous fauna and nearby habitats.	- One of two key accommodation nodes along the corridor. - Very high and growing demand for accommodation. - Assists in staggering access into Milford Sound Piopiotahi. - Links well with Knobs Flat experience node. - Revenue opportunity. - Utilises existing heavily modified site. - Maintains an accommodation mix and price point that facilitates a diverse range of visitors (domestic and international etc). - As above - opportunity for commercial enterprise, potential benefits to Ngai Tahu communities.
4.4	Create a Whakatipu Super Track Head Node. Note: was initially considered for the Divide but was changed due to hazard risks. Divide can be refocused to a short stop	**Location:** In the Lake Marian car park area. **Function:** More clearly defined hub for the track network and associated experiences, linked to 1 Access models and allied with threshold/theming roles as under 4.1 and generally across 4. Enhances the Milford Corridor experience. Key activity / facility location for Mana whenua. **Form:** New and upgraded tracks and track connections, appropriate signage (possibly some limited visual gateway structures) and road end hub facilities (e.g., shelter and	- Will require a greater level of analysis to test the high-level viability of the concept (e.g., infrastructural requirements etc). - A variety of walking tracks from Short Stop Traveller to Day Walk walking (and later tramping) track standard (see SNZ HB 8630:2004). These tracks will link into longer overnight walking tracks. Some areas may require an "Urban Path" standard	- This is a modern reinstatement of the Whakatipu Trail (a historical series of trails linking Whakatipu Waimāori/Lake Wakatipu with the West Coast) - Strong support from mana whenua. Ngai Tahu seek the return of their identity and connections to the mountains in this area. - Living classroom/wānanga for Ngai Tahu rangatahi. Protection and endorsement of tangible and intangible cultural heritage of Ngāi Tahu

ID	Item	Description	Specification	Rationale
	traveller interpretive site as required.	toilets). interpretation/information, Mana whenua facility, transport connections (hop on-off etc), vehicle parking). A covered nature trail on or near grade for wheelchair accessibility with rich interpretation. **Scale:** Current footprint scale (or slightly altered/ increased subject to technical / operational requirements). New tracks and structures will be required to link with existing track network.	around key infrastructure / track heads. - Track lengths are initially estimate up 35km for all linkages. - Will also require toilets, shelter, observation, interpretation and parking / drop off areas.	- Include cultural storytelling element Ownership of Ngāi Tahu culture, practices, rituals and stories is to be held by Ngāi Tahu. - Recognises the symbolic east / west transalpine crossing of Southern Alps. - An iconic 'new' node – establishes a recognised upper mid-corridor destination that adds value to/offers alternative to Milford Sound Piopiotahi. - Provides a full spectrum of walking opportunities from short to multi day walks. Serves a critical mass of users (potentially accessible for different user groups). - Facilitates access to key observation points such as Key Summit. - Links several recognised routes / great walks. - Covered nature trail provides an all-weather experience for all ages and abilities.
4.5	Enhance and/or create additional walk/cycle tracks or network connections enabling new experience opportunities.	**Location:** Multiple options considered subject to site availability and detailed experience value assessments. Include short stops, half-day/day trips, overnight/multiday experience options and network accesses. Potential sites: • Mistake Creek (overnight walking track experience, • Knobs Flat to Cascade Creek (shared use track). **Function:** Increase range of options available (to disperse current uses, create additional capacity, introduce new experience site/network opportunities). Focus on area of greatest demand = short stop – day walks and overnight walks. Important that tracks are linked with accommodation and track head nodes. **Form:** Low impact connections (linked to access models and enhancing the Milford Corridor experience). Emphasis on short	- Family friendly bike trail standard. - A variety of walking tracks from Short Stop Traveller to Day Walk walking track standard (see SNZ HB 8630:2004). Lengths to TBC with ground analysis. - Estimate 11km of track between Knobs Flat and Cascade Creek. - Estimate circa 21km of track (and associated short walks) and up to an 80-bunk hut. - Note: Environmental effects of trail (particularly cycling trail) linking Knobs Flat and Lake Gunn/Cascade Creek would be material, particularly through high value beech forest. Careful design and construction to minimise ecological effects required.	- Makes accommodation nodes more family friendly and enables a longer stay (reduces vehicle reliance). - Adds to attractiveness of the corridor as a standalone experience. - To offer the widest range of recreational experiences possible the Knobs Flat – Cascade Creek track is favoured to be a walking and biking surface if technically / environmentally viable. However, if this is not possible it could be a walking connection only (a narrower walking trail is less obtrusive than cycle trail). - Mistake Creek one or two-day (overnight) walk would assist in the provision of a spectrum of activities and use Cascade Creek campsite as the track head. This strengthens the attractiveness of the campsite. - Cultural narrative, ingoa tūturu (traditional place names)

ID	Item	Description	Specification	Rationale
		stop traveller and day walk track standards and an easier overnight walking experience (with hut). **Scale:** Subject to site availability and experience value assessments, appropriately experience-targeted (emphasis on minimising impact). Emphasis on linking with accommodation nodes. Environmental effects more manageable in Eglington Valley grasslands than in beech forest.		- Generate revenue by charging more for accommodation (amenity charge built into accommodation fee).
4.7	Upgrade short stop options along corridor	**Location:** Multiple options considered subject to site availability, experience value assessments and access model requirements. **Function:** Increase range of short-stop options available (to disperse current uses, create additional capacity, introduce new experience opportunities). Selection of sites and level of infrastructure is linked to access models. **Form:** Roadside pullover/stopping sites with short walks to key attractions/viewpoints with interpretation. Many of the sites will already have a degree of modification. **Scale:** Subject to site availability/capacity, functional requirements, and experience value assessments (objective minimise impacts by using already modified sites).	- Walking tracks to a minimum of Short Stop Traveller walking track standard (see SNZ HB 8630:2004). Some areas may require an "Urban Path" standard around key infrastructure / track heads. - Small sites (15-20 min stop): Open sided simpler bus shelter, Single vault toilet (or similar TBC), Tracks (short loop) and observation points, interpretation panels, internet / mobile connectivity. - Medium sites (20-40 min stop): Larger bus shelter (timber lined with interpretation panels), Single vault toilet (or similar TBC), Tracks (longer loops) and observation points, interpretation panels, internet / mobile connectivity. - Larger sites (40 mins + including key nodes): Larger bus shelter (timber lined and interpretation), single vault toilets x2 (or similar TBC), tracks (longer loops) and observation points, interpretation, internet / mobile connectivity. - Iconic design to develop international appeal. - Avoid locating bus shelters and structures in open views from the road. Locate them against landform and/ vegetation cover.	- Spreads visitors out along a range of corridor short stop sites (Note: not all busses would stop at all locations). - Modified locations exist that can be optimised (no need for new green field locations). - Facilitates the functionality and uptake of the hop on hop of coach service. - Adds to the critical mass of experiences along the corridor. - Facilitates a range of interpretation opportunities (from static to guided approaches). - supports the unfolding cultural narrative. - Formalising a small network of stopping points rather than having a large number of informal stopping points is preferable so that visitor impacts can be minimised and managed.

ID	Item	Description	Specification	Rationale
4.8	Enhance Cascade Creek campsite (Eglinton Valley Accommodation Nodes)	**Location:** Current footprint area and beyond (subject to flood hazard and visual impact minimisation). **Function:** Enhance camping accommodation along Milford Road for Corridor-based visitors (such camping is in high demand). **Form:** Low impact but enhanced and/or increased environmentally appropriate spaces (and support facilities) suitable for tent camping/ campervan parking. Landscaping and some 'extra' facilities (i.e., wifi capacity, park & ride base capacity) to enhance site attractiveness. **Scale:** Utilise existing footprint and some modified areas not in use (if they are considered safe).	- The objective of this site development is to not over intensify the site with structures / infrastructure. Focus is instead placed on lifting the landscape quality (such as bunding and planting). - Shared kitchen shelters circa 25m^2 GFA x 2. - Dinning / heavy rain shelter (30m^2 solid roof, open on two sides, metal floor) x 2. - Grass campsites: circa 25m^2 -35m^2. Numbers TBC based on site capacity. - Campervan sites: metal circa 30m^2 – 40m^2. Numbers TBC based on site capacity. - Toilets numbers and design TBC. Most likely dispersed vault toilets. - Improved landscaping and screening between camping sites.	- Minimising hard infrastructure (to limit potential flooding damage), - Retains existing use optimising what is already in place (retains existing development footprint within a modified site). - One of two key accommodation nodes along the corridor and serves as the track head for the proposed Mistake Creek overnight walk. - Meets a very high and growing demand for camping accommodation. - Benefits the overall visitor experience by helping to stagger access into Milford Sound Piopiotahi (facilitating earlier Milford Sound Piopiotahi visitation). - Serves as a revenue opportunity.
4.9a	Investigate and consider enhanced/new experience options in the upper Hollyford Valley.	**Location:** Upper Hollyford Valley above the Hollyford Road turnoff (Falls Creek to Gertrude Valley/Homer Tunnel) Lower Valley below it (Lake Marian to Moraine Creek/Hollyford Track and network accesses). Multiple options subject to detailed feasibility, sustainability, experience value assessments, network options, and access model requirements. **Function:** Incorporate Hollyford Valley options in an enhanced Milford Corridor experience. **Form:** Appropriate recreational experiences -facilitated by strategically located minimal impact road end, track connections and enhancements. Some will be extensions while others may be new tracks (that are ideally linked with other experiences). **Scale:** Subject down-valley somewhat to future of the Hollyford Road, Gunns Camp, Hollyford Track (and networks) and any connections associated with a Whakatipu Super Track Head Node at the Lake Marian carpark (4.4).	- Walking tracks to a minimum of day walk to tramping track standard (see SNZ HB 8630:2004). - Requires strategically located hazard shelters. - Incorporate appropriate carparking for recreational users unable to utilise buses. Note: See 4.4 Whakatipu Super Track Head Node.	- Reconnecting the Whakatipu Trail. - Provides a greater spectrum of recreational opportunities (especially walking opportunities). - Takes pressure of other high demand walking tracks. - Opportunity needs to be considered as part of the Whakatipu Super Track Head Node (see 4.4). - Optimisation and enhancement of existing assets.

ID	Item	Description	Specification	Rationale
4.9b	Investigate and consider enhanced/new experience options in the lower Hollyford Valley.	**Location:** Lower Valley below the Hollyford Road turnoff (Lake Marian to Moraine Creek/Hollyford Track and network accesses). Multiple options subject to detailed feasibility, sustainability, experience value assessments, network options, and access model requirements. **Function:** Incorporate Hollyford valley options in an enhanced Milford Corridor experience. **Form:** Appropriate recreational experiences -facilitated by strategically located minimal impact road end, track connections and enhancements. Some will be extensions while others may be new tracks (that are ideally linked with other experiences). **Scale:** Subject down-valley somewhat to future of the Hollyford Road, Gunns Camp, Hollyford Track (and networks) and any connections associated with a Whakatipu Super Track Head Node at the Lake Marian carpark (4.4).	- Walking tracks to a minimum of day walk to tramping track standard (see SNZ HB 8630:2004). - Requires strategically located hazard shelters. - Incorporate appropriate carparking for recreational users unable to utilise buses. - Note: See 4.4 Whakatipu Super Track Head Node.	- Reconnecting the Whakatipu Trail. - Provides a greater spectrum of recreational opportunities (especially walking opportunities but also rafting and potentially cycling). - Takes pressure of other high demand walking tracks. - Opportunity needs to be considered as part of the Whakatipu Super Track Head Node (see 4.4). - Optimisation and enhancement of existing assets. - Potential cycling opportunity from Lake Marian carpark to end of Hollyford Rd.
4.10	Homer Tunnel portals (short stop) Note: The eastern portal was dropped (for cost benefit and safety reasons) in favour of the western portal	**Location:** Homer tunnel Milford Sound Piopiotahi side (Western Portal). **Function:** Safe observation point looking out over the alpine environment into Milford Sound Piopiotahi. **Form:** Strong well engineered observation portal sheltered from rock and avalanche risks. **Scale:** Sufficient to protect as a minimum 45- 90 pax (one - two coaches). Pax either inside or outside bus (preferably outside).	- Specification TBC following further analysis. - Size TBC subject to engineering requirements. - Iconic design that supports low-impact design principles	- Offers safe viewing location on the Milford Sound Piopiotahi side of the Homer tunnel. - Best opportunity for passive (non-direct) observation of kea. - Good sightlines over alpine environment. - Iconic design contributes to international branding/reputation. - Cultural narrative
5	**Develop Te Anau as a sub-regional visitor hub to encourage more visitors to stay overnight**			
5.1	Te Anau Hub As part of the Te Anau Hub develop a Milford corridor and Milford Sound Piopiotahi experience hub/conservation HQ in Te Anau.	**Location:** Te Anau (with transport hub). **Function:** Essential role anchoring the start of the experience in Te Anau and encouraging a bus transport model. **Form:** A built visitor experience most likely on one level. **Scale:** TBC with detailed feasibility estimate at master planning stage a minimum of 800m^2. -1,000m^2	- Linked into transport terminal (assumes shared foyer, toilets etc. - Gallery 650m^2 – 700m^2 (black box high stud), - Audio-visual / seminar rooms 90m^2 – 200m^2 - Office 20m^2 -60m^2 - Plant room / back of house 40m^2.	- Essential for providing the starting point for the experience in Te Anau. - Links with Mana whenua objectives of delivering a strong interpretive narrative. - Provides accessible conservation experiences and education on conservation values and conservation management in Fiordland. - Significant opportunity to re-invest visitor income into conservation. - Can be used day and night as an attraction.

ID	Item	Description	Specification	Rationale
				- Design to encourage colocation and optimise ripple impacts for Te Anau (i.e., becomes visitor precinct) that increases economic activity in the town. - Ngai Tahu culture is expressed in the built landscape. - Offers visitor education on hazards.
5.2	Te Anau Hub As part of the Te Anau Hub develop a transport terminal in Te Anau.	**Location:** Te Anau (with experience hub). **Function:** Essential role anchoring the start of the experience in Te Anau and encouraging a bus / ferry transport model. **Form:** A built visitor experience most likely on one level. Integrates with ferry, air and sea-plane facilities using shuttle services **Scale:** TBC based on transport modelling.	- Linked into experience hub/conservation HQ. - Ticketing and group organisation / mustering space / café - Toilets, services, storage. - Offices. - Large outside covered mustering /spill out areas. - Parking. Note: final specification depends heavily on transport model adopted and location of facility.	- Essential for providing the starting point for the transport experience into Milford Sound Milford Sound Piopiotahi. Enables: 1) Visitors to be pulsed through the network (better experience). 2) Forms Te Anau into a key entry point and accommodations hub for the Milford Sound Piopiotahi experience.

7.53 Note: Other work stream reports have addressed structural governance and management changes related to tourism and the funding of conservation and infrastructure initiatives.

SHORTLIST – POTENTIAL IMPACTS

Table 22: Shortlist – Impacts: Recreationists / Visitors / Operators

Potential Impacts				
ID	**Item**	**Recreationists**	**Visitors**	**Operators**
1	**Develop new transport models to manage visitor flows**			
1a	Mixed access model A	• Represents a change from the status quo so therefore likely to meet with resistance from recreationists initially. • Recreationists undertaking boating, kayaking, climbing and hunting will not be restricted although they will need to pre plan to gain access to available car / boat parks in the corridor and Milford Sound Piopiotahi.	• International visitors will be directed towards coach services assisting with improving economic multipliers (generating a greater flow of money within the regional economy) while making the road network safer and less congested. The quality of the visitor experience will also be improved through greater interpretive opportunities. • Domestic visitors will have a choice of self-drive (if they plan and book a car park space), hop-on/hop-off buses or coach tours. Given this still represents a change from the status	• Represents a change from the status quo. However, it should represent and opportunity for operators so long as old bus / coach fleets are phased out over time (and electric / hydrogen are phased in). • The model could work with several operators. • The detail of the model is likely to be contested by different operators as it has the potential to impact on existing business models.

Potential Impacts				
ID	**Item**	**Recreationists**	**Visitors**	**Operators**
		• Reducing visitor vehicles should make access less congested and easier / safer for recreationists. • Once operating the hop-on/hop-off bus service should make access for trampers / walkers relatively convenient and safer.	quo there is likely to be resistance in the short term. The benefits remain access flexibility, improved safety, improved interpretation / narrative (on bus and coach services). • Domestic and international visitors staying in pre booked campsites / accommodation will still have self-drive vehicle access to their accommodation (if desired).	• By helping to spread visitor numbers more evenly across the day, the access model will enable Milford Sound Piopiotahi to accommodate continued growth in visitation without negatively impacting visitor experience. This is expected to have positive revenue impacts for operators based in Milford Sound Piopiotahi and supporting areas e.g., Te Anau.
1b	Mixed access model B	• Represents a change from the status quo so therefore likely to meet with resistance from recreationists initially. • Recreationists undertaking boating, kayaking, climbing and hunting will not be restricted although they will need to pre plan to gain access to available car / boat parks in the corridor and Milford Sound Piopiotahi. • Reducing visitor vehicles should make access less congested and easier / safer for recreationists. • Once operating the hop-on/hop-off bus service should make access for trampers / walkers relatively convenient and safer.	• International visitors will be directed towards coach services assisting with improving economic multipliers while making the road network safer and less congested. The quality of the visitor experience will also be improved through greater interpretive opportunities. • Domestic visitors will not have self-drive access to Milford Sound Piopiotahi (unless in booked accommodation). Access will be via hop-on/hop-off buses or coach tours. There is likely to be significant resistance to this domestically. The benefits remain access flexibility, improved safety, improved interpretation / narrative (on bus and coach services). • Domestic and international visitors staying in pre booked campsites / accommodation will still have self-drive vehicle access to their accommodation (if desired).	• Represents a change from the status quo. However, it should represent and opportunity for operators so long as old bus / coach fleets are phased out over time (and electric / hydrogen are phased in). • The model could work with several operators. • The detail of the model is likely to be contested by different operators as it has the potential to impact on existing business models. • By helping to spread visitor numbers more evenly across the day, the access model will enable Milford Sound Piopiotahi to accommodate continued growth in visitation without negatively impacting visitor experience. This is expected to have positive revenue impacts for operators based in Milford Sound Piopiotahi and supporting areas e.g., Te Anau.
2	**Develop a compelling suite of experiences in Milford Sound Piopiotahi to encourage visitors to stay longer and contribute to the local economy**			
2.1	Develop new walking tracks and observation points in Milford Sound Piopiotahi	• Unlikely to have any direct impact on recreationists.	• This will offer all visitors a wider range of opportunities an enable those seeking short walks and viewing opportunities an ability to explore. • Those more sensitive to perceived crowding can move into areas with fewer visitors. • Offers an alternative to on water activities and an ability to connect more directly with the natural environment in an extremely accessible way.	• Creates an opportunity for commercial guided walking experiences based from the visitor hub (potentially in conjunction with on water opportunities). • Unlikely to impact on most operators.

Potential Impacts				
ID	**Item**	**Recreationists**	**Visitors**	**Operators**
2.2	Establish an interpretive Marine Centre in Milford Sound Piopiotahi	• Unlikely to have any direct impact on recreationists.	• Provides visitors a base level understanding of the marine environment that they see within Milford Sound Piopiotahi. • Interpretation can be designed for all ages and cultures. • During inclement weather the Centre offers an indoor activity. • Enables visitors who do not desire active outdoor experiences an alternative passive activity. This can enable more active members of a traveling group an opportunity to undertake more active experiences separately.	• Acts as an orientation point or compass that can be used to direct visitors to other points of interest such as the on water marine observatory, boat trips and kayaking excursions. • May be perceived by some existing operators as absorbing visitors' time and reducing the opportunity to undertake other paid activities.
2.3	Incorporate the Commercial Port (Deep Water Basin) into the visitor experience	• This will lead to a far safer and better structured boat ramp and parking area for recreational boaters. Visitors will be encouraged to stay clear of working areas and observe from a safe distance.	• Will keep visitors safer by separating them from active boat ramp and commercial areas. • Offers a level of interpretation to assist in explaining the built environment and the activities being undertaken. • Creates a safer commercial kayaking experience separate from the recreational boat ramp. • Offers an alternative eating location more orientated towards fresh seafood.	• Creates a safer commercial port environment. • Increases the opportunity for a commercial seafood hospitality experience.
2.4	Develop multimedia experience before and/or during exploration (augmented with / supporting hands on experiences)	• Unlikely to have any direct impact on recreationists.	• Will improve the delivery of interpretive material for all visitors.	• May encourage the update of commercial guided experiences.
3	**Redesign Milford Village to lift the quality of the built environment and reflect its world-class status**			
3.1	Create a compelling sense of arrival into Milford Sound Piopiotahi	• Unlikely to have any direct impact on recreationists.	• Adds to a sense of arrival and anticipation for visitors. It showcases the reveal and helps foster a sense of 'wow' on arrival.	• Unlikely to have any direct impact on operators.
3.2	Establish a new Milford Sound Piopiotahi Visitor hub (including visitor safety features).	• Unlikely to have any direct impact on recreationists.	• Locates the main hub in a centralised location that enables visitors to circulate around Milford Sound Piopiotahi more easily. • Acts as compass so visitors are presented with a range of internal and external opportunities / experiences. • Enables less mobile visitors or those seeking more passive experiences to reside in a	• Introduces additional revenue generation opportunities. • Could be perceived as a threat to existing operational models. May make visitors less boat focused.

Potential Impacts				
ID	**Item**	**Recreationists**	**Visitors**	**Operators**
			centralised location with excellent views and interpretation if they wish. • Offers an indoor experience for those visitors sensitive to inclement weather.	
3.3	Develop new visitor accommodation	• Unlikely to have any direct impact on recreationists (unless they are associated with a Milford Track great walk in which case the accommodation is positive).	• Facilitates Milford Track opportunities. • Enables those visitors who desire a more immersive longer experience the opportunity to stay overnight.	• Some operators may be opposed to new accommodation because they may see it as a threat to existing business models. • Having accommodation continues the status quo so should be seen positively by most tour / boat operators.
3.4	Redevelop tourist boat terminal	• Unlikely to have any direct impact on recreationists.	• Unlikely to have any direct impact on visitors other than speeding up their transition onto a boat which will be positive (both from a safety perspective and from an experiential perspective).	• Some operators will likely see this as a threat to their current operational models. • The existing terminal is likely to be perceived as an asset which enables coach fleets direct drive-up access. This is likely to be particularly true of coaches originating in Queenstown who are under time pressure. Any change is likely to be viewed negatively.
3.6	Review policy regarding cruise liners in Milford Sound Piopiotahi	• Likely to be perceived favourably by recreationists. Reduces perceived visual and smell impacts.	• Unlikely to have any direct impact on most visitors given the timing of visits (early morning late afternoon). • However, over time as visitor activity patterns spread out and Milford Sounnd Piopiotahi is reshaped cruise ships may be considered more intrusive. Research would be required to determine this.	• Cruise operators will perceive any restrictions as a threat to current operational models. • Cruise operators will state that any changes / greater restrictions in Milford Sound Piopiotahi will have a knock-on impact throughout the South Island reducing sector economic benefits. • Tour and boat operators in Milford Sound Piopiotahi are unlikely to have any significant negative impacts with most seeing potential advantages.
3.7	Remove fixed wing runway from Milford Sound Piopiotahi (Phased withdrawal).	• Likely to be perceived favourably by some recreationists. Reduces perceived visual and noise impacts. However, the majority will likely be neutral because it is a localised activity that does not directly impact them.	• The proportion of visitors transported by plane is comparatively small compared to overall visitor movements, so no major impact is anticipated. • Those wishing to travel by air can still do so using rotary although this will be at a higher cost. Some visitors will view this as a negative. • Some aviation enthusiasts will object to the loss of fixed wing access.	• The loss of fixed wing aircraft access will have a significant impact on the aviation companies that operate them. • The extent of financial impacts will depend on how operators respond to the change. With sufficient notice, some operators may be able to redeploy their aircraft to other destinations and/or offer other services, e.g. helicopter services or scenic fly-overs.

Potential Impacts				
ID	**Item**	**Recreationists**	**Visitors**	**Operators**
			• Removal of the runway enables the redesigned Milford Sound Piopiotahi to have greater connectivity (e.g., better walkways, better connection between experiences west of the current runway and the visitor hub), thus improving the visitor experience relative to the status quo.	• Phasing changes in over time and / or compensating operators where concessions and other agreements are in place will assist in softening the financial impact. • Rotary operators may find their passenger numbers increase slightly. • Given the small passenger volumes lost most tour operators are unlikely to see any significant financial losses.
3.8	Relocate and/or redevelop resident accommodation	• Unlikely to have any direct impact on recreationists.	• Unlikely to have any direct impact on visitors. • Good design and planning will limit the risk of impacting on hotel guests.	• Represents a significant change to a part of the Milford Village that is not considered by most to be broken at this time. • Opportunity to reset the resident accommodation approach and move towards a higher density, higher quality accommodation model in the safest possible hazard location. One operator with experience of student accommodation in Auckland welcomed the move stating, “better quality, safer, and on a small footprint”. • Likely to be seen as unnecessary by the majority of operators.
4	**Enhance the Milford corridor experience to expand the options available to visitors**			
4.1	Create a strong National Park entry threshold. (Gateway node)	• Creates the perception that the main National Park road entry is closer to Te Anau. • Develops a clear threshold and suggests that upon crossing over the recreationist is subject to a new set of social norms (more conservation focused). • No negative impacts on actual recreational opportunities.	• Creates the perception that the main National Park road entry is closer to Te Anau. • Develops a clear threshold and suggests that upon crossing over the visitor is subject to a new set of social norms (more conservation focused). • No negative impacts on actual visitor opportunities. • Potentially creates a photo opportunity useful in social media marketing.	• No impact on operators.
4.2	Develop Knobs flat experience node	• Unlikely to be an attraction for more dedicated / specialist recreationists. • May be perceived by some as over developing the corridor with built assets but as the site is easily bypassed it is	• Will be attractive for a large cross section of visitors (both those passing on a short stop and those staying at accommodation sites). • Increased utilisation of the corridor.	• No impact on operators (other than when tours have limited stopping time such as in the case of those leaving from Queenstown).

Potential Impacts				
ID	**Item**	**Recreationists**	**Visitors**	**Operators**
		unlikely to be detrimental to overall trip perceptions (especially given its front country location and conservation messaging).		
4.3	Develop Knobs Flat accommodation node. (Eglinton Valley Accommodation Nodes)	• Offers an accommodation option prior to undertaking recreational activities along the corridor and in Milford Sound Piopiotahi. • May be seen by some as a commodification of the corridor.	• Offers an accommodation option prior to undertaking visitor activities along the corridor and in Milford Sound Piopiotahi. • Increased utilisation of the corridor.	• Places visitors within the Corridor which could assist with supporting early morning and late afternoon commercial activities in Milford Sound Piopiotahi. • Offers a commercial accommodation business in the corridor. • Offers a potential base for guided experience in the corridor. • Has an opportunity cost in the eyes of some operators who had their own plans for the site.
4.4	Create a Whakatipu Super Track Head Node in the Lake Marian Car Park.	• Likely to be viewed favourably by most recreationist such as trampers as it provides greater functionality and levels of service at the start of longer overnight / multi day walks. • Increased utilisation of the corridor.	• Likely to be viewed favourably by most visitors as one-track head offers a diversity of walking and interpretive experiences serving all ages and abilities. • Higher service standards are likely to be appreciated by visitors (toilets, interpretation, shelter, bus / coach stops etc). • Increased utilisation of the corridor.	• Offers a potential base for guided experience in the corridor. • Has no or very limited impact on most commercial operations.
4.5	Enhance and/or create additional walk/cycle tracks or network connections enabling new experience opportunities.	• Likely to generate a split response from the recreational sector. Some advocate for no bike opportunities in national parks while others will support a greater diversity of opportunities. • Perceived benefits include greater connectivity between key nodes such as campsites, wider spectrum of opportunities and less vehicle movements. • Perceived negatives associated by some with bikes include user conflict and environmental damage (from wider width track clearance).	• Likely to be viewed favourably by the majority of visitors. Offers a greater spectrum of activities. • Enhances the appeal of key accommodation nodes by increasing the range of support activities and connectivity between sites. • Increased utilisation of the corridor.	• Potential commercial opportunities such as bike hire and shorter guided experiences. Increases attractiveness of accommodation nodes in the corridor. • Most operators will be neutral as such developments are not expected to significantly impact them.

Potential Impacts				
ID	**Item**	**Recreationists**	**Visitors**	**Operators**
4.7	Upgrade short stop options along corridor	• Front country short stop sites are unlikely to appeal / interest recreationists unless they incorporate the start of longer multi day walks or are aligned with climbing locations.	• Meets the need for short stop front country sites that are in high demand nationally so will be seen as beneficial by most visitors. • Offers shorter easily accessible walks and observation points which are sufficient for most visitors to feel a connection with the natural environment. • Increased utilisation of the corridor.	• Unlikely to have a significant impact on most operators. However, site improvements will help to increase the overall quality of the visitor experience delivered on commercial tours which will in turn assist operators. • A greater diversity of short stop sites will assist the potential for a greater range of different tour experiences.
4.8	Enhance Cascade Creek campsite (Eglinton Valley Accommodation Nodes)	• Cascade Creek is likely to be more aligned to recreationists' requirements (being simpler and less developed and further up the corridor).	• Will meet the needs of visitors seeking a more basic campsite. • Increased utilisation of the corridor.	• Unlikely to have any impact on commercial operators.
4.9a	Investigate and consider enhanced/new experience options in the upper Hollyford Valley.	• Likely to find favour with recreationist and be seen as a way of opening up new recreational opportunities. • Increased utilisation of the corridor.	• Depending on the level of shorter stop and half day opportunities possible this initiative is likely to increase utilisation of the corridor.	• Unlikely to have any impact on commercial operators.
4.9b	Investigate and consider enhanced/new experience options in the lower Hollyford Valley.	• Likely to find favour with recreationist and be seen as a way of opening up new recreational opportunities. • Increased utilisation of the corridor.	• Depending on the level of shorter stop and half day opportunities possible this initiative is likely to increase utilisation of the corridor.	• Unlikely to have any impact on commercial operators. • Likely to be seen as a concession opportunity by some operators.
4.10	Homer Tunnel portal (short stop)	• Unlikely to have any impact on recreationists.	• Will become a key photo opportunity for many visitors. Forms a key 'wow' moment and marks the arrival into Milford Sound Piopiotahi.	• Unlikely to have any significant impact on commercial operators.
5	**Develop Te Anau as a sub-regional visitor hub to encourage more visitors to stay overnight**			
5.1	Te Anau Hub As part of the Te Anau Hub develop a Milford corridor and Milford Sound Piopiotahi experience hub/conservation HQ in Te Anau.	• Unlikely to have any significant impact on recreationists apart from as a source of current track information and trip reporting.	• Becomes the central starting point for the Milford Sound Piopiotahi experience. • Can offer something for all visitors and could be visited more than once during a stay in Te Anau (depending on how the interpretive and audio-visual displays were staged over the day / evening).	• Presents an opportunity to centralise a range of ticketing and marketing functions on one site. • May not be seen favourably by all operators who have become well established in other areas of Te Anau.

Potential Impacts				
ID	**Item**	**Recreationists**	**Visitors**	**Operators**
5.2	Te Anau Hub As part of the Te Anau Hub develop a transport terminal in Te Anau.	• Unlikely to have any impact on recreationists unless they are utilising the hop-on/hop-off bus to access the roadhead for multi-day walks, in which case it will be viewed positively.	• Centralise Milford Sound Piopiotahi transportation options in one area and streamlines the process from a visitor perspective. • Requires the majority of visitors to separate from their rental / private vehicles which for some will be perceived negatively.	• Presents an opportunity to centralise a range of ticketing and marketing functions on one site. • May not be seen favourably by all operators who have become well established in other areas of Te Anau. Will move the centre of gravity away from existing coach servicing points.
5.3	Develop new family-friendly experiences in the Te Anau basin.	• No identified negative impacts.	• Assist in making Te Anau into more of a regional hub and providing a diversity of experiences for visitors (especially short stop activities that assist in filling half and quarter day itinerary gaps to encourage longer stays).	• Provides economic benefits for Te Anau business (extended stays and greater economic multipliers). • Some operators outside Te Anau may not welcome change to existing visitor patterns because of the threat it presents to current operating models.
5.4	Create new walking/cycling tracks connecting into Te Anau.	• Likely to be seen as a positive move improving connectivity and recreational opportunities in close proximity to residential homes and accommodation.	• Assist in making Te Anau into more of a regional hub and providing a diversity of experiences for visitors (especially short stop activities that assist in filling half and quarter day itinerary gaps to encourage longer stays).	• Provides economic benefits for Te Anau business (extended stays and greater economic multipliers). • Some operators outside Te Anau may not welcome change to existing visitor patterns because of the threat it presents to current operating models.
5.4	Redesign the Te Anau waterfront and town centre.	• No identified negative impacts.	• Lifts the quality of the Te Anau experience and makes more of the lakefront and main street.	• Provides economic benefits for Te Anau businesses (extended stays and greater economic multipliers).

7.54 Note: Other work stream reports have addressed structural governance and management changes related to tourism and the funding of conservation and infrastructure initiatives

8 COMMENTS ON SPECIFIC SHORTLIST OPTIONS

8.1 Certain shortlisted options are likely to be more contentious than other based on factors such as the views of incumbent operators, recreationists and the public, the potential financial impact, the capital cost of an option, and/or the degree of physical or operational change. Additional comment has therefore been made on resident accommodation, the aerodrome, and cruise ships. Transportation models although essential to tourism are addressed in detail in the transport workstream reports. The individual infrastructure, hazards and conservation reports also provide additional detail, especially on the aerodrome and cruise ships.

VISITOR CAP

8.2 The current peakiness of intra-day visitor flows (with many more people arriving in the middle of the day than in the hours before and after) results in a suboptimal visitor experience and pressure on infrastructure in peak periods, and an inefficient utilisation of assets and staff at other times. (Ref Baseline sections 2.14-2.18 describing intra-day visitor flows.)

8.3 The shortlisted access models both include the adoption of an hourly cap on visitor numbers in Milford Sound Piopiotahi. The purpose of the cap would be to relieve congestion at peak times and spread visitor flows more evenly across the day. By encouraging growth at off-peak times, an access system with hourly arrival cap will allow daily visitor numbers to continue to grow without negatively impacting on visitor experience.

RESIDENT ACCOMMODATION

IMPORTANCE FOR TOURISM OPERATORS

8.4 Providing secure accommodation for the tourism workforce in Milford village is essential given the long drive times between the nearest residential areas in Te Anau (and the boundary of the National Park). As a result, operators must provide workers accommodation for different durations. The rotation of staff varies between organisations and their positions. Some workers can rotate on a weekly basis (such as service staff) in the high season while other (such as boat skippers and senior staff) will reside in the village for a year or more on an almost permanent basis.

8.5 Currently staff are housed in various buildings in the ‘village’ adjacent to the aerodrome runway. The housing is spread across a comparatively large footprint (circa 37,000 m2). This area has been raised and stabilised in the recent past. However, the location is still within a significant hazard zone (see hazards workstream report).

THE CHALLENGE

8.6 Milford Sound Piopiotahi presents several unique challenges from a residential housing perspective. These include a very significant natural hazard risk across the entire area (to varying degrees), a shortage of quality building platforms, conservation restrictions, and zones that receive little or very limited natural sunlight year-round (because of the topography and forest cover). Given these factors it is clear why the current village site was selected.

8.7 Based on available data retaining this site has several significant drawbacks. These include:

- Placing residents who spend a considerable length of time in Milford village in a higher hazard zone (see hazards workstream reports).
- Taking up land that is needed to ensure there is a coherent redevelopment approach for Milford Sound Piopiotahi such as for other functions, such as short-term centralised car and coach parking that has been landscaped and shielded from the rest of the site. (see master plan report).

THE OPPORTUNITY

8.8 The opportunity exists to completely reconceptualise the provision of resident accommodation in the village. This will:

- Make it safer from natural hazards (offering improved safety to residents),
- Improve the functionality and amenity value of the building(s),
- Reduce the overall building footprint,
- Maximise views and retain acceptable sunlight levels,
- Improve the 'residence experience' for staff.

8.9 Achieving this will require the adoption of more of an urban building typology and taking a longer-term view of residential housing requirements. A working example of the approach envisaged is university student accommodation in Auckland. The typology of units varies significantly and includes:

- Single rooms (with/without en-suites) (Figure 50),
- Double rooms (with/without en-suites),
- Apartments (ranging from 1-4 bedrooms) (Figure 51),
- Shared kitchen spaces,
- Shared communal / leisure areas (Figure 52).

Figure 50: Example – single room

Figure 51: Example – double room

Figure 52: Example – communal space

8.10 One operator in Milford Sound Piopiotahi with experience of the University of Auckland model believed it would be an ideal solution in Milford. They liked the fact that a diversity of unit types could be accommodated in one building with separation of spaces through design. For example, all the long-term accommodation in apartment form could be located on the top level and accessed through a separate entry from the lower level single and double rooms. They also liked the fact that improved social spaces could be provided for residents.

8.11 It is envisaged that the new resident accommodation facility would be located adjacent to the proposed visitor hub facility on the area of higher ground (see master planning report). This location minimises hazards as much as possible while reducing the visual impact of the building (as it is against the ridgeline and adjacent to the visitor hub and visitor accommodation). The potential also exists to be creative with the building and introduce vegetation to the façade (as is being done internationally).

8.12 Maintaining noise separation from visitors was a key factor operators liked about the existing residents' village location. Noise reduction and separation is a key factor in the design and planning of student accommodation in urban areas also. Adopting modern design and selecting the correct materials can eliminate the risks of collocating visitor and resident facilities. An additional community space for noise activities could also be developed on the edge of the commercial port area if it were required.

8.13 The preliminary gross floor area (GFA) of the residents accommodation building is estimated in Table 23. This building at a GFA of circa 5,200m2 would be multi-level and sufficient to accommodate 300 residents (50 more people than the current village's normal loading)[26]. It is envisaged the facility would be owned by a single entity and units would be leased to individual operators.

Table 23: Resident Accommodation Preliminary Estimates

Type of space	Number	GFA per space	Total GFA	Residents Accommodated
Single Room (without Bathroom)	100	10.5m^2	1,050m^2	100
Shared Kitchens / Dinning	16	20m^2	320m^2	
Shared Toilets/shower	16	15m^2	240 m^2	

[26] Final accommodation number for any facility would need to be determined as part of a feasibility assessment.

Type of space	Number	GFA per space	Total GFA	Residents Accommodated
Double Bunk Room (with en-suite)	60	15m^2	900m^2	120
Shared Kitchens / Dining	10	25m^2	225m^2	
Single Room (with en-suite)	60	13m^2	780m^2	60
Shared Kitchens / Dinning	10	20m^2	200m^2	
Apartment (1 bedroom)	10	50m^2	500m^2	20
Social Space for all residents			400m^2	
Plant Rooms etc			100m^2	
Sub Total			4,715m^2	
Circulation	10%		471m^2	
Total (circa)			**5,186m^2**	**300 Residents**

AERODROME

8.14 The hazards, transport, conservation, and infrastructure workstream reports have additional technical data on the aerodrome and should be read in conjunction with the tourism commentary outlined in this section.

ALTERNATIVE USE OPPORTUNITIES – ROAD REALIGNMENT

8.15 The use of the existing airport taxiway, apron and terminal area enables greater flexibility in the way Milford village is configured and optimised. In particular this:

i. Strengthens the sense of arrival with view shafts towards Mitre Peak. This is likely achieved without removal of existing planting, particularly those obscuring the current approach route on SH94,

ii. Enables the formation of a one-way ring road and coach loading and unloading area to the south west corner of the proposed visitor hub (retaining most vehicle movements to the south west side of the visitor hub),

iii. Separates coaches / transport areas from the main hub, because it is lower reducing visual impact from hub and minimises vehicle movements in front of the proposed visitors centre and hotel (i.e.,, keeps vehicles to 'back of house' areas),

iv. Enables additional options for more convenient cross-runway access to car parking and activities near Deepwater Basin,

v. Strengthens walking connections around the visitor hub and towards Deepwater Basin destinations, reducing existing severance with Milford Village and Freshwater Basin.

8.16 The use of the runway (removal and repurposing / revegetation of at least half of the northern end of the runway) will enable:

i. Greater walking track connectivity to the Cleddau Delta area (South West, West and North West) of the hub,

ii. Pedestrianised axis along the Mitre Peak viewshaft with additional Bowen Falls viewing opportunity at end of runway (diversifies experiences),

iii. Greater walking connectivity to the commercial and recreational harbour activities at Deepwater Basin (note proposed changes here let visitors see what is taking place but keeps them separated from recreation and commercial boat activities).

8.17 Removal of the runway enables Milford Sound Piopiotahi to work more holistically as an integrated visitor precinct. It enables far greater connectivity between different visitor experiences.

The runway area is not considered appropriate for buildings (especially multi-storey buildings) because of ground conditions and impact to sight lines.

VISITOR VOLUMES

8.18 Current data indicates that approximately 4.7% of visitors to Milford Sound Piopiotahi arrive via air (inbound circa 40,000, assuming 75% of available seats are full), with the vast majority of visitors arriving via road (95% or 828,300 visitors in 2019). Fixed wing air arrivals have a natural ceiling when weather conditions and available landing times are considered. This is particularly true in terms of peak season arrivals. In time as visitation numbers increase it could be anticipated the proportion of fixed wing and rotary passenger arrivals will decline as a proportion of overall arrivals (even if a trend towards larger aircraft continues). In 2008 6.9% of visitors to Milford Sound Piopiotahi arrived via air (rotary and fixed wing), by 2019 this had dropped to 4.6% of total visitor arrivals.

8.19 Data provided by the Queenstown Milford Users Group (QMUG) in October 2020 indicates existing total movements are split 58% / 42% in favour of fixed wing over rotary. The QMUG report also indicates that passenger capacity is split circa 75% / 25% in favour of fixed wing over rotary, although we are unable to verify this split because the Ministry of Transport only records the number of aircraft movements in its data, not the reason for those movements or the number of passengers carried. On a seat-count basis, we estimate that around 66% of aircraft seats at Milford Sound airport are on fixed wing aircraft, which broadly concords with the proportions presented by QMUG. At an October aviation engagement workshop, the participants stated that fixed wing landings per annum were at capacity (due to available flying days being limited and the volume of aircraft).

8.20 In the cost-benefit analysis provided in Section 8 below, we have assumed that removal of the fixed wing runway would impact visitor numbers as follows:

8.21 50% reduction in the number of visitors arriving in Milford Sound Piopiotahi by air (it is assumed that existing rotary services would continue and that other rotary services would be added to partially fill the gap left by fixed wing aircraft);

8.22 of the 50% of visitors that would no longer arrive in Milford Sound Piopiotahi by air, 25% would travel by road instead. This means that 12.5% of people who previously flew to Milford Sound Piopiotahi would travel by road (25% of 50%).

8.23 Based on these assumptions, we estimate that removing the fixed wing runway would result in the loss of approximately 20,000 visitors to Milford Sound Piopiotahi per year. This represents around 2% of projected visitation to Milford Sound Piopiotahi in 2030, gradually declining to around 1.5% by 2070.

VISITOR EXPERIENCE – NOISE

8.24 While the noise of aircraft can be acknowledged as an obvious externality from the extensive aircraft operations in and around Milford Sound Piopiotahi, the evaluations of this in terms of overall visitor experiences were varied. The main overall finding from extensive analysis of a very large body of trip review comments from visitors to Milford Sound Piopiotahi was that the overall experience was very highly positive. While a variety of negative aspects were also raised (within otherwise positive overall evaluations) this was only done in a small minority of these review comments, and these very rarely specifically mentioned issues related to aircraft.

8.25 A small number of previous relevant research and monitoring surveys that have been undertaken (by DOC and others) in and around Milford Sound Piopiotahi have identified higher awareness and negativity examples associated with aircraft noise – although this was usually in response to direct prompts about the issue. Where unprompted, comments about aircraft noise issues were not frequent. This response also varied according to the context of the visitor and the activity they were engaged in. Higher awareness and concern about aircraft noise was raised in survey findings of cases such as climbers based at Homer Hut, recreational users of Deepwater Basin, and locals/workers at Milford Sound Piopiotahi.

8.26 Overall, the bulk of Milford Sound Piopiotahi visitors - who are largely first-time/one-time visitors (most usually from overseas) - appeared to be tolerant of aircraft noise in terms of their overall visit experience evaluations.

8.27 In summary, numerically for most current visitors to Milford Sound Piopiotahi, aircraft noise did not seem to be 'ruining' any positive experience outcomes. For those with high expectations of features such as 'wilderness', 'solitude', 'natural quiet' in their visit to Milford Sound Piopiotahi, or who were focused on activities that would typically include such features, the negative impact potential of aircraft noise would be higher.

8.28 Better matching expectations with received visit experiences would appear to be a key requirement of site management (for example if we are pushing towards a more natural experience with increased walking areas, observation points and the use electric coaches and electric boats (in the longer term) noise from any source may become more prominent in the immediate Milford Sound Piopiotahi environment.

8.29 It is also important to acknowledge that:

- technological advances in aircraft design have seen base aircraft noise reduce. This pattern is likely to continue, especially as electric aircraft develop.
- Improvements in aircraft operation such as using larger aircraft (fewer flights) and optimising flightpaths etc. have seen experienced aircraft noise reduce.

VISITOR EXPERIENCE – VISUAL IMPACT OF AIRCRAFT

8.30 Analysis of visit review and secondary data for this project identified there were no recorded issue with the visual effect of aircraft. In addition, the issue of aircraft visibility has not been highlighted in any research seen from other Fiordland sites. This mirrors general research knowledge around aircraft issues in relation to visitor experiences. An exception may be where the visibility of aircraft has been noted incidentally in association with concerns related to aircraft noise.

CRUISE SHIPS

8.31 The cruise sector has undergone a rapid expansion in New Zealand up until COVID19. In the year ending June 2019 circa 222,000 international cruise liner passengers visited Milford Sound Piopiotahi. The growth in ships and visits over the past 14 years is shown in Figure 53.

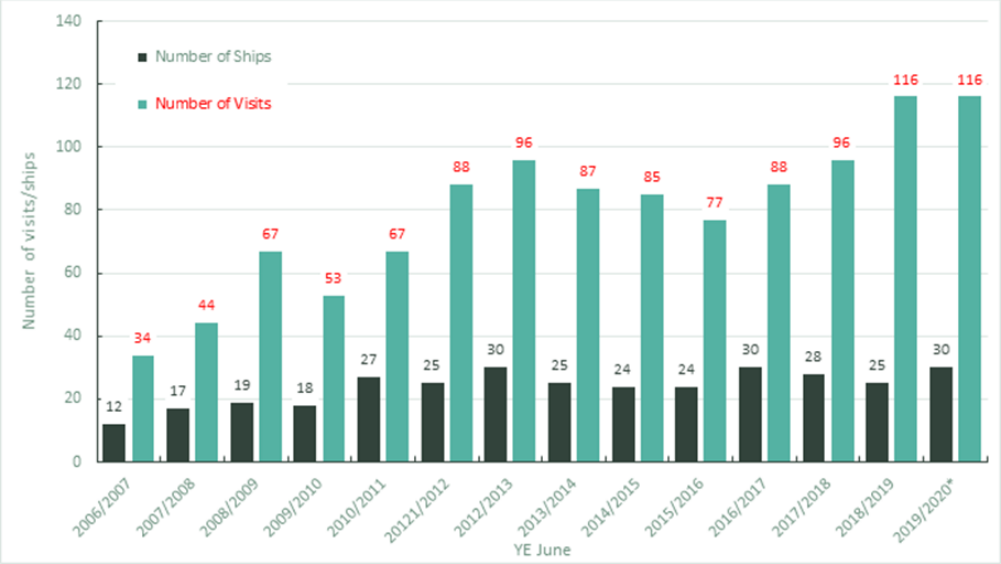


Figure 53: Visiting cruise ships/ total visits[27]

[27] Note: 2019/2020* = data a mix of completed and scheduled visits to June 2020 – some were subsequently cancelled due to COVID.

(New Zealand Cruise Association)

THE VALUE OF CRUISE

8.32 The exact value of cruise to the New Zealand economy has been contested over recent years but recent Stats NZ estimates suggest it was in the order of $570 million nationally in the year ending June 2019. Around 2.5% of this ($14.6 million) is estimated to have accrued to Southland, which includes Bluff, Fiordland, and Stewart Island. This includes onshore expenditure by passengers as well as passenger charges and any provisioning, bunkering, etc conducted in the region.

8.33 The cruise sector has a reputation for strong advocacy and negotiation both domestically and internationally.

8.34 There is an ongoing debate in New Zealand and globally around the value of cruise tourism to local communities. Commonly raised issues include:

- Relatively low daily spending rates among cruise passengers when they are onshore.
- The commercial incentive for international cruise lines to capture and retain as much passenger spend as possible while they are in New Zealand waters (this is normal behaviour for any commercial operator).
- The buying power of international cruise lines and how this can be used to minimise local operator margins for onshore excursions.
- The congestion created by the disembarkation of thousands of cruise passengers into local communities.
- The displacement impact cruise ships have on local and domestic expenditure (i.e. when cruise ships are in port local and domestic customers stay away from businesses around ports such as restaurants and shops).

8.35 Most value from cruise tends to be extracted by the international companies who own the ships and at departure and arrival ports (such as Auckland where passenger board and disembark). Although these benefits are less if passengers do not stay overnight and they fly in or out on the day of arrival or departure.

8.36 In the case of Milford Sound Piopiotahi most of the local value from cruise is amassed (from visitation fees) and distributed regionally by the Regional Council. An agreement between the Regional Council and the Cruise Industry is currently being renegotiated.

8.37 The original agreement set fees against the tonnage of each cruise ship with the maximum tonnage fee being fixed. Over time the tonnage of vessels increased significantly above the maximum fee cap meaning the bigger the vessels (and the larger the passenger numbers) became the better the deal the cruise industry received (because the fee remained fixed).

8.38 The Regional Council received around $2.9 million in visitation fees in the 2018/2019 season. The money received by the Regional Council can be distributed as the Council desires across different regional activities (fees have been used for navigation aids, research, and coastal conservation activities).

8.39 If the number of cruise ships visiting Milford Sound Piopiotahi were to decrease as a result of tighter restrictions, this may have the effect of reducing the visitation fee revenue received by the Regional Council. Any decrease in cruise volumes could be offset by higher fee levels negotiated under the new agreement, however.

8.40 Additionally, we are recommending that an access fee be imposed on all international visitors to Milford Sound Piopiotahi, including those who experience the Sound by sea (i.e. a uniform charge would be collected from cruise ship passengers, visitors who arrive by road and visitors who arrive by air). This would create a new revenue source that could be used to help cover the costs of developing

and operating Milford Sound Piopiotahi as well as potentially helping to fund local initiatives such as conservation projects. (See CBA Section 10 on access fees.)

SIGNIFICANCE OF MILFORD SOUND PIOPIOTAHI TO CRUISE

8.41 The international cruise industry has stated publicly that without Milford Sound Piopiotahi as a visiting point they would have no reason to visit the lower South Island (ports such as Otago and locations such as Stewart Island would drop off tour itineraries). They assert this would result in millions of dollars in lost revenue to Southland and Otago (in particular Dunedin). Some industry representatives have stated Milford Sound Piopiotahi is a pinnacle cruise experience and one that is significantly marketed internationally in itineraries.

8.42 It is difficult to predict with any certainty how cruise ships would respond to restrictions on their ability to access Milford Sound Piopiotahi and/or changes in the access fees required to do so. In our view, it is unlikely that this would result in a material reduction in the number of cruise ships coming to New Zealand, particularly if they continued to have the ability to access other sounds.

THE PERCEIVED IMPACTS OF CRUISE

Visitor Impacts

8.43 Investigation of 25 past research/monitoring reports and extensive visitor site reviews (1000+ TripAdvisor reviews in detail) related to Milford Sound Piopiotahi recreational visits consistently showed high positive overall visit evaluations (high satisfaction levels etc). This meant that the vast majority of visitors had experiences of Milford Sound Piopiotahi that they evaluated overall very positively. Some negative experiences elements were noted within these otherwise overall positive evaluations. Cruise ships were not a prominent negative.

8.44 This may in part be due to survey design or the time when visitors were in Milford Sound Piopiotahi. Most visitors are in the area before 6pm and after 10am. The vast majority of cruise ships arrive outside these times due to arrival and departure requirements agreed with the Regional Council. If the proposed access / transport changes being proposed are adopted over time greater numbers of visitors can be expected to encounter cruise ships.

8.45 Only one research report highlighted prominent negative issues that could be related in part with Cruise Ships. This was a DOC Monitoring Survey Report in 2019 focussed on Deepwater Basin Users. These users had very high overall visitor experience evaluations, but in response to prompted questions asking for specific ratings of listed potential disturbance sources found the highest negative responses related to Aircraft (73% disturbed) followed by Scenic Cruise Boats/Cruise Ships (67% disturbed). Here the survey design combined these two ‘cruise’ types into a single response item, and the degree to which response was attributable to Cruise Ships (as opposed to Scenic Cruise Boats) was unclear. However, with respect to cruise ships a few mentions were made in supplementary open-ended question responses to cruise ship ‘smoke’. With these results however it is important to note that despite having awareness of such disturbances, the affected visitors still rated their overall experiences very highly. This example was the most negative response by far related to cruise ships.

8.46 Discussions with Milford Sound Piopiotahi residents and boat crews indicated at certain times the inversion layer within the sound resulted in ‘smoke’ from cruise ships being present well into the day (many hours after cruise ships had left). This was perceived to be detrimental to other visitors’ experiences some of whom were reported as calling it “smog”.

8.47 Figure 54 shows an image of a cruise ship in Milford Sound Piopiotahi. Figures 55-58 indicate the indicative visual impact of different size cruise ships from the Milford Village shoreline.

8.48 Any potential conflict could be reduced initially by preventing cruise ships from operating in Milford Sound Piopiotahi at the same time as local boat cruises or other shore-based visitor activities (in line with the current approach). This may lead to cruise ships being removed in the future as shore-initiated activities take place earlier and later in the day (due to access model changes and the proposed development of new accommodation).

Figure 54: A cruise ship in Milford Sound Piopiotahi.
Source: Otago Daily Times via Google

Figure 55: Cruise ship profile 1.

Figure 56: Cruise ship profile 2.

Figure 57: Cruise ship profile 3.

Figure 58: Cruise ship profile 4

INDUSTRY MITIGATION STEPS

8.49 Industry representatives have stated they have adopted a range of impact mitigation measures, including such steps as:

- Arriving and departing outside peak visitation periods each day,
- Retaining bilge water and cleaning vessels hulls,
- Fitting and using scrubbers.

9 RECOMMENDED OPTION

INTRODUCTION

9.1 The recommended project option has developed through the multi-disciplinary inputs from various workstreams. The project team have engaged with Southland District Council, Department of Conservation, Environment Southland, Waka Kotahi, Iwi and many more national, regional and local stakeholders. Ideas in development have been shaped and cross-examined by Reference Groups, the Project Working Group, and the Governance Group.

9.2 At the current time, the recommended option has yet to be confirmed by the Governance Group. These recommendations are therefore those of the Tourism and Recreation workstream but remain consistent with the whole project team. It is also important to remember that as this is a master planning project, ideas are expected to be further refined and evidenced through additional focused research and engagement after the Master Plan is completed. This process may influence the optimisation and determine the detailed viability of some initiatives. All proposed initiatives should undergo detailed feasibility, site and design interrogation before development.

9.3 The Recommended Option is a suite of interventions that collectively add value to the visitor experience whilst also improving visitor safety and creating revenue opportunities to help fund the project (capital and operational, including experiential and risk management plus conservation). The elements of the Recommended Option relevant to tourism are summarised below. Attention is first directed towards general network issues, then Te Anau and surrounds, the corridor and finally Milford Sound Piopiotahi itself.

GENERAL NETWORK ISSUES

TRANSPORT MODELS

9.4 From a tourism and recreation perspective an access model that enables some degree of flexibility is favoured. This is best reflected in ‘mixed access model A’ which is largely public transport focused with a mix of tour bus, hop-on hop-off and non-stop buses designed to support a more immersive visitor experience on both the Milford Road and in Milford Sound Piopiotahi. It is envisaged that low or zero carbon buses would be phased in.

9.5 The model allows some self-drive visitor parking to be retained at Milford Village (potentially 60% less than current levels) and along the Milford Road corridor. Access to parking at key visitor locations could be booked in advance of arrival to reduce congestion. A booking system would assist in giving domestic visitors more certainty that a car park is available prior to departure. Those staying at accommodation in Milford Sound Piopiotahi or along the corridor would also have the option of private vehicle access (regardless of whether they are local or international visitors). This would be factored into their accommodation charge. Hop on hop of bus and coach access would still be encouraged where possible.

9.6 Tangata whenua and recreationists that require private vehicles (such as those with boats, heavy equipment, or hunters) would also be provided access. In the case of recreationists such access is likely to be permitted potentially with a combination of one-off or annual passes. Recreationists undertaking day or multi day walks are also likely to find the model’s proposed hop-on hop-off bus service an attractive alternative to leaving a private vehicle unattended at a track head.

9.7 This approach, although likely to be challenging for some during the transition phase, represents the best model to encourage greater use of coaches and buses while still retaining flexibility for some domestic visitors and recreationists. The outcome will be safer roads, a much-reduced environmental footprint and more assured access to vehicle parking in key locations.

9.8 Another benefit of moving towards a more coach focused system is the flexibility to accommodate a range of hourly arrival rates. Table 24 sets out a summary of potential arrival rates and annual

pax (passenger) rates. This demonstrates that hypothetically up to 1.6 million pax could be transported by coach alone, if required.

Table 24: Coach System Capacity and Associated Data

Data Estimates	Daily Pax Per Hour (Capacity)				
Scenarios (pax/hr)	600	700	800	900	1,000
Bus Fleet Size (total)	92	100	115	134	148
Bus arrivals per hour	15	18	20	22	24
Number of bus bays required in Milford Sound Piopiotahi (incl. tour & hop-on/hop-off)	8	8	9	9	9
Number of bus parks in Milford Sound Piopiotahi	11	12	15	22	26
Average daily pax in peak season	3,700	4,300	4,900	5,500	6,100
Peak day pax in peak season	4,700	5,500	6,300	7,100	7,900
Annual pax estimate (considering seasonality)	1.12m	1.27m	1.41m	1.52m	1.63m

Notes:

1) Does not include Hop on / Hop Off and FIT visitors (maximum circa 1,000 per day).

2) Pax = passengers

9.9 It is anticipated that the access system will be phased in over time by utilising existing tourism sector coach fleets.

CAP ON VISITOR NUMBERS

9.10 Another key component of the recommended access model is the adoption of an hourly cap on visitor arrivals to Milford Sound Piopiotahi. The cap is designed to relieve congestion and spread visitor numbers more evenly across the day, resulting in improved visitor experience and better utilisation of assets and staff.

9.11 A cap of 1,000 arrivals per rolling hour[28] is considered to be optimal considering the following factors:

9.12 *Community prosperity*: The cap allows overall visitor numbers to continue to grow, with associated spending benefits for local communities.

9.13 *Visitor experience*: Because the new layout of Milford Sound Piopiotahi will spread people out more evenly across the site, it will be possible to accommodate 1,000 arrivals per hour while improving the visitor experience. Most visitors are expected to spend a maximum of around 3 hours (for many it will be less) on site in different locations (for example, on boats, in the visitor hub and out and about on walking tracks, etc.). Preliminary estimates based on the proposed master plan indicate around 1,000 – 1,500 visitors will be present in a given location at a given time. This is comfortably below current peak hour visitor numbers at the boat terminal (estimated to be around 2,000 people[29]).

9.14 *Infrastructure*: The assets in Milford Sound Piopiotahi have been designed to accommodate 1,000 visitor arrivals per hour without perceived crowding or negative environmental effects.

9.15 *Transport*: 1,000 people per hour can be moved to and from Milford Sound Piopiotahi via a predominantly coach-based transport system. (The mixed access model allows for some private vehicle access to continue but is designed so that it can accommodate up to 1,000 arrivals per hour (100% of the recommended visitor cap) via coach if needed).

[28] The use of a rolling hour ensures that a maximum of 1,000 visitors can arrive in any 60-minute period, which avoids the potential for 1,000 to arrive at 12:59pm and another 1,000 to arrive at 1:01pm.

[29] This is 80% of boat capacity, considering that all boats tend to depart at around the same time at present.

9.16 *Environmental impacts*: Milford Sound Piopiotahi is able to accommodate 1,000 arrivals per hour without negatively impacting the environment by focusing development in already-modified locations.

9.17 *Hazards*: 1,000 peak arrivals per hour represents a similar hazard risk as the status quo. Overall natural hazard risk under the preferred option is expected to be lower than the status quo as a result of more resilient building design and placement.

9.18 *Cultural values*: A reduction in crowds and a site design that encourages people to experience important cultural places, activities and stories will enable visitors to feel the wairua of the place.

9.19 *Commercial operators*: A cap of 1,000 arrivals per rolling hour (potentially pulsed through at around 15-minute intervals, is expected to enable efficient utilisation of visitor assets (e.g. boat fleets) throughout the day.

9.20 A cap of 1,000 arrivals per hour enables Milford Sound Piopiotahi to accommodate up to 1.6 million visitors annually in the long term.

9.21 The hourly cap could be implemented by managing the schedules of coach/bus operators or boat operators to achieve a more even distribution of visitor arrivals. A managed transition from the current departure profile to a more uniform profile will be required to minimise impacts on commercial operators. Most operators are likely to be supportive of having a more uniform departure schedule in the long-term, but consultation with commercial operators will be required to navigate the transition in a commercially sustainable manner.

ACCESS FEE

9.22 The final critical component of the recommended access model is the imposition of an access fee (entrance fee) on international visitors to Milford Sound Piopiotahi. The purpose of the access fee is to (a) recover development and ongoing operational expenses; and (b) create a sustainable income stream to fund local projects and conservation initiatives. This is consistent with the principles of regenerative tourism which are based on the premise that visitors should leave a place better than they found it.

9.23 It is anticipated that the access price would be a uniform charge on all international visitors (regardless of access mode) for entry to the park. The level of the fee could flex over time (e.g. in response to changing demand conditions) and could allow for differential pricing between seasons or times of day as a means of incentivising off-peak visitation.

9.24 The access fee concept, including expected impacts on demand, is discussed in more detail in the CBA section of this report (section 10).

9.25 From a tourism and recreational perspective, we believe that smoothing visitor loadings, constraining private vehicles and designing key short stop sites and nodes more efficiently, will allow for higher annual visitation while improving the quality of the visitor experience. Imposing an access fee will ensure that international visitors ”give back” to the environment and local communities. Establishing and implementing a robust monitoring system will assist in determining appropriate visitation levels.

Recommendations:

1. Mixed access model A should be progressed for further detailed business case analysis.
2. An hourly cap on visitor arrivals to Milford Sound Pioipiotahi should be adopted to smooth visitor flows.
3. An access fee should be imposed on international visitors to Milford Sound Piopiotahi to help recover development and operational costs and fund conservation projects and other local initiatives.

GOVERNANCE AND MANAGEMENT

9.26 The tourism and recreation workstream have reviewed the outcomes of the current governance and management structures and systems and found them to be sub-optimal to achieve the ambitions of the master plan. Governance and management are addressed in detail in the governance and management workstream reports. However, from a pure tourism and recreational lens it is strongly recommended that a more integrated governance and management structure be implemented (at least for the Milford corridor and Milford Sound Piopiotahi and immediate surrounds).

9.27 Although available data indicate visitor satisfaction remains high, this masks the fact that the current system clearly contributes towards a number of sub-optimal infrastructure, service and regional economic outcomes. Key areas of concern with the current approach are that concessions and leases are not delivering an optimal visitor experience on the ground or maximising wider regional economic benefits.

9.28 Coordinated planning together with service and asset delivery remains unnecessarily complicated and time consuming. This is largely because of the concessions and lease processes and the number of proponents involved. These have led to a “house that jack built” planning and implementation approach on the ground, especially in areas such as Milford village. Many assets have also not been maintained at desirable levels. Fragmentation of concession data also makes it difficult to adequately gauge the holistic impact of concessions on an area.

9.29 It is also likely that New Zealanders have been displaced from certain sites as they cater more intensively to the international visitor market. These displaced recreationists and visitors rarely appear in satisfaction data. A more centralised governance and management approach would assist in making sure a better spectrum of opportunities is delivered for all visitor types. This desire is reflected in the master planning report.

Recommendations:

1. A single integrated governance entity should be established to streamline management and development decisions associated with Milford Sound Piopiotahi and the Milford Road corridor.
2. The discussions and findings from Workstream Three should be integrated into future governance deliberations.

TE ANAU AND SURROUNDS

9.30 It is recommended that Te Anau is supported to become a more dominant visitor hub and the starting point of visitors’ Fiordland experience. This will require a number of investments within the town and its surrounding area. The fundamental catalyst for this will be the Te Anau experience and transport hubs which should be co-located to maximise critical mass and functionality. The viability of these hubs will be dependent on adopting the recommended transport model into Milford Sound Piopiotahi.

9.31 Increasing visitors’ length of stay within Te Anau will also be dependent on implementing a range of initiatives in and around the town that enable visitors to undertake shorter duration activities on either side of longer visits into Doubtful Sound and Milford Sound Piopiotahi. Recommended initiatives include:

- Redesign the Te Anau waterfront and town centre,
- Create new walking/cycling tracks connecting into Te Anau,
- Develop new family-friendly experiences around Te Anau in such areas as Brod Bay campsite and the Hidden Lakes.

9.32 In time increasing walking opportunities to the south of Te Anau should also be explored. For example, in the Manapouri/Hope arm area as there is an opportunity to create several day or overnight walks utilising largely existing hut and track infrastructure. Scope also exists to explore

current or new experience opportunities associated with areas such as Doubtful Sound; the South and West Arms of Lake Manapouri; the Borland Road; Lakes Monowai and Hauroko; the Hump Ridge Track. These initiatives would further support Te Anau and offer alternative opportunities to those along the Milford corridor.

9.33 Increasing the significance of Te Anau as a visitor hub will take time and involve overcoming a series of challenges, such as accommodation provision and seasonality. The town will continue to have marked seasonality patterns as it does not have a winter season visitor offer to the same degree as Queenstown (skiing). However, the economic performance of the town can be improved with coordinated implementation of the initiatives outlined.

9.34 The tourism workstream sees the experience and transport hubs as being central core project initiatives. The redesign of the waterfront and town centre, cycling and walking tracks and optimised family experiences (such as in locations such as Brod Bay and the Hidden Lakes) can be implemented in time with the support of partner entities such as The Department of Conservation, Southland District Council, community organisations and businesses.

Recommendations:

1. The Te Anau Hub (containing the Te Anau transport and experience hubs) should be progressed for detailed feasibility assessment.
2. The Milford Opportunities Project should encourage:
    a. The redesign of the Te Anau waterfront and town centre,
    b. The creation of new walking and cycling tracks connecting into Te Anau,
    c. The optimisation and development of new family friendly experiences close to Te Anau in areas such as Brod Bay and the Hidden Lakes.
    d. Exploring walking opportunities to the south of Te Anau.

THE CORRIDOR

9.35 The corridor has the potential to play a more significant role in visitors' experience. Currently most visitors undertake a "race to the boat" in their coaches, campervans, and rental cars. For many the corridor is not an immersive experience and represents nothing more than a short series of photo opportunities at a handful of roadside stops.

9.36 Regardless of the interventions recommended, for most visitors the corridor will continue to be a relatively fast experience as they will be entering and exiting the National Park and Milford Sound Piopiotahi in a single day. The adoption of the proposed transportation model and infrastructure in Te Anau will in time give a far higher proportion of visitors the opportunity to experience more of the corridor (e.g., by entering the park earlier and leaving later). For these visitors, emphasis has been placed on improved short stop site design and interpretation, forming a stronger park entry and greater flexibility through a hop on hop off transport service.

9.37 For other visitors and recreationists, the proposed interventions are designed to lift the standing of the corridor as a destination in its own right. Fundamental to this is the provision of a wider spectrum of walking opportunities (and biking opportunities where appropriate). People can undertake these experiences by staying overnight within the National Park (at the improved accommodation nodes such as Cascade Creek or Knobs Flat) or by making day trips from external accommodation locations such as Te Anau Downs or Te Anau itself.

9.38 A track between Knobs Flat and Cascade Creek is envisaged to give campers from Knobs Flat walking, running, and cycling (if viable) access to both Cascade Creek and Lake Gunn (and Mistake Creek). In the opposite direction the track is more likely to be used by campers for exercise purposes. Depending on its route the track may also facilitate angling access. From past research we know that campers appreciate easily accessible recreational opportunities adjacent to their camping locations, especially those that link sites.

9.39 The Whakatipu Super Track Head Node represents a modern reinstatement of the Whakatipu Trail (a historical series of trails linking Whakatipu Waimāori/Lake Wakatipu with the West Coast). It recognises the symbolic east / west transalpine crossing of Southern Alps and has strong support from mana whenua.

9.40 As an iconic 'new' node it establishes a recognised upper mid-corridor destination it both adds value and offers an alternative to Milford Sound Piopiotahi. It provides (and meets the demand for) a full spectrum of walking opportunities from short to multi day walks and will appeal to multiple visitor and recreational types. It facilitates access to key observation points such as Key Summit and links several recognised routes / great walks. The opportunity also exists to explore further experience opportunities in the upper and lower Hollyford Valley. The former Divide track head can be explored as a short stop traveller interpretive site.

9.41 Importantly the Lake Marian carpark is considered the safest location for vehicle parking, facilities and track integration having withstood several hazard events in the past. The Divide car park and track head can be decommissioned when the Whakatipu Super Track Head Node is established.

9.42 Of fundamental importance to the corridor planning has been the acknowledgement of the rights of Mana whenua. Several initiatives have been proposed that enable both unrestrained access and improved cultural opportunities; these include the development of a super track head and associated tracks and facilities that represent a modern reinstatement of the Whakatipu Trail and serve as a living classroom/wānanga for Ngāi Tahu. This initiative recognises ngā ara tawhito trails (historical trails/routes) which are an integral part of Ngāi Tahu culture.

9.43 Another consideration has been the importance of ensuring domestic recreationists can retain access to key areas for activities such as kayaking, boating, hunting, and climbing. Recreationists participating in such activities often start them at road and track heads that are shared with general visitors. While these general visitors can access via coach and bus, often recreations cannot because of the nature of their equipment. The needs of these recreationists have been considered and accommodated in the recommended transportation model and in the approach taken to site optimisation. The reduction in the volume of international visitors using rental cars and camper vans should also assist recreationists (it is proposed that international visitors can only use rental vehicles and camper vans if they have pre booked accommodation in the corridor and Milford Sound Piopiotahi itself). Recreationists without heavy equipment are also likely to be attracted by the flexibility of the hop on hop of transport service.

9.44 In the same way that a better spectrum of walking opportunities is being proposed, a range of accommodation options is also being recommended. In addition to retaining the existing smaller camp sites along the corridor three key accommodation nodes are being indicated. Two, Knobs Creek and Cascades Creek, involve the optimisation of existing sites while one, the Mistake Creek tramping hut, is new.

9.45 Mistake Creek is designed to accommodate walkers undertaking a new multi day walk which compliments the longer and shorter walks already on offer in and adjacent to the corridor. This experience is designed as a steppingstone for the longer walking experiences. The hut is envisaged to accommodate up to a maximum of eighty walkers when fully developed (although it would likely be staged subject to a detailed feasibility assessment). The walk would begin and end at the Cascade Creek campsite.

9.46 The optimisation of Cascade Creek is very much a tread lightly initiative given the site's challenges with flooding and open position. The area is already heavily modified and most development is envisaged to involve improved landscaping to accommodate tenting and camper van sites. Infrastructure development (such as buildings) would involve basic structures only. The outcome should be a site that looks less rather than more site hardened.

9.47 Unlike Cascade Creek, Knobs Flat is envisaged to involve the development of more built infrastructure in the forms of cabins, amenity buildings and interpretive structures. Subject to feasibility it may also accommodate a small lodge offering accommodation. This site could also

offer camping and camper van accommodation. The site is already heavily modified and sheltered by vegetation.

Recommendations:

1. A strong park entry threshold should be formed as close to the park entry as possible.
2. The Knobs Flat accommodation and interpretive node should be advanced for detailed feasibility assessment and concept design.
3. The Cascade Creek accommodation node should be advanced to the detailed concept design stage.
4. The Whakatipu Super Track Head Node at the Lake Marian carpark and its associated track sections should be advanced to feasibility and concept design stage. Consideration should be given to upper and lower Hollyford Valley experience opportunities.
5. Short stop sites along the corridor should be advanced to detailed concept design stage.
6. The Mistake Creek walking track, and hut concept should undergo a detailed feasibility analysis.
7. Connecting tracks between and from key nodes such as the Lake Marian car park - Key Summit, and Cascade Creek and Knobs Flat should advance to feasibility assessment.
8. The Homer tunnel western portal observation point and eastern portal barrier viewing area should undergo a detailed technical feasibility assessment.
9. A detailed interpretive plan should be undertaken once the master plan has been adopted.

MILFORD SOUND PIOPIOTAHI

9.48 Milford Sound Piopiotahi can best be described as piecemeal in both design and appearance. Visually it appears to lack any coordinated planning or standardised quality. Developments that have been undertaken tend to be in response to a particular need and not integrated as part of a larger master plan. The built framework of the site was set many decades ago when visitation patterns and visitor profiles were vastly different. The area is clearly sub-optimal by today's standards. The reasons for this are many and varied but include planning and concessions frameworks and fragmented governance and management systems.

9.49 Although visitor data indicate high satisfaction levels from overall visits, this is occurring despite the site's poor-built design and appearance. The natural beauty of Milford Sound Piopiotahi in the eyes of many is so high that they are prepared to overlook the built deficiencies. However, these data do not capture visitors and recreationists who have been displaced from the area or do not visit because it does not offer the experiences or quality of experience that they seek.

9.50 The site also receives visitation in a pronounced peak during the day (late morning -early afternoon). This is largely due to the travel time from Queenstown which results in large number of visitors arriving at the same time rather than being spread out across the day. These time limitations mean that for most visitors their Milford Sound Piopiotahi experience is almost entirely comprised of a boat trip before needing to leave quickly to meet itinerary and driver hour[30] constraints.

9.51 It is strongly recommended that the wider Milford Sound Piopiotahi village precinct[31] be redeveloped to be more cohesive to meet modern planning and design practices that will assist in the delivery of better conservation, visitor experience and financial outcomes for Southland and the lower South Island. This should be undertaken in conjunction with the recommended

[30] By law coach drivers are required to adhere to a maximum number of driver hours and rest breaks in any given workday.

[31] Note: The Milford Sound Piopiotahi village precinct incorporates both Milford village (at Freshwater Basin) and Cleddau Village (staff accommodation at Deepwater Basin).

governance and management, transportation model, Te Anau, and Corridor recommendations outlined in the master plan report.

9.52 An objective of the redesign of the area is to make it more than just a location to take a boat ride. The recommended initiatives bring about substantive change to the way visitors experience the area. A centralised visitor transport and experience hub is located in the safest part of the foreshore area and serves as a compass directing visitors to the types of experiences they desire. These can include the world-famous boat tours, walking a network of new short walks (some reaching raised viewing areas), or undertaking more passive activities such as taking in scenic views from new on grade, accessible observation points in and around the visitor hub.

9.53 The site is no longer divided in two by a runway which is removed in favour of a new heliport, walking tracks, access ways, observation areas and revegetation initiatives. Removal of the runway allows for spatial optimisation of Milford Sound Piopiotahi, improves the visitor experience, reduces environmental impacts, and avoids costly runway improvements, while having only a minor impact on visitation.

9.54 Visitor safety is improved by centralising buildings into safer areas, installing refuges in low lying coastal zones near areas of visitor activity, separating visitors from commercial and recreational boating activity (into designated viewing areas) and reducing dwell times in danger zones (such as rockfall areas). The safety of residents is also optimised with a new staff accommodation building in a safer zone.

Recommendations:

10. The fixed wing aircraft runway should be removed in time from Milford Sound Piopiotahi and a rotary heliport retained. Detailed feasibility analysis should be undertaken on the heliport.
11. The proposed centralised transport/visitor hub and interpretive marine centre should be advanced for detailed feasibility analysis. Subject to the findings of this analysis the existing boat terminal should be replaced with a gateway facility.
12. The proposed walking tracks, observation points[32] and reorganisation of the commercial port area should be advanced to detailed concept design and feasibility.
13. A detailed interpretive plan should be undertaken once the master plan has been adopted.
14. Visitor accommodation should be advanced for detailed feasibility assessment.
15. Resident accommodation should be consolidated centrally (co-located with the visitor hub). The facility should be advanced to the feasibility study stage.
16. The policies surrounding cruise ship access to Milford Sound Piopiotahi should be reviewed.

[32] . In time “the top falls link” to Bowen falls should also undergo detailed feasibility investigation (possibly after simpler observation opportunities for Bowen Falls have been explored and if viable implemented).

10 COST BENEFIT ANALYSIS

CBA OF PREFERRED OPTION FOR MILFORD SOUND PIOPIOTAHI

BACKGROUND

PROJECT OBJECTIVES

10.1 The Milford Opportunities Project (MOP) has developed a preferred masterplan option for Milford Sound Piopiotahi, the Milford corridor and the surrounding region that responds to the project brief issued by the Milford Opportunities Project governance group[33]. The primary objective of the master plan is 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 Zealan;d Inc.

10.2 MOP came out of discussions between Southland District Council and the Department of Conservation about the issues around congestion at certain times in Milford Sound Piopiotahi and on the Milford Road. The first stage of MOP established the context, vision, and objectives for the project, including the development of seven project pillars:

- Mana Whenua values woven through - Iwi 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.
- 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.
- Tourism funds conservation and community - The visitor experience will become an engine for funding conservation growth and community prosperity.
- 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.
- 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.
- Conservation - Manage Fiordland National Park to ensure ongoing protection of pristine conservation areas, while enabling restoration of natural ecological values in other areas
- Harness innovation and technology - leading technology and innovation is employed to ensure a world class visitor experience now and into the future.

10.3 These project pillars have been used as critical reference points throughout the master planning process to ensure that the preferred master plan option complies with the project brief. Working within the constraints of these diverse and aspirational pillars has required the consideration and balancing of a wide range of complex and sometimes sensitive issues.

10.4 While MOP was initially motivated by the need to manage congestion in Milford Sound Piopiotahi, it has evolved to become much more than that. MOP represents a fundamental step-change in the way we think about destination management, the visitor experience, and the wellbeing of host communities

[33] Members include representatives from iwi, Southland District Council, Queenstown Lakes District Council, Department of Conservation, Waka Kotahi NZ Transport Agency, Ministry of Business, Innovation and Employment, and two tourism business operators. The governance group is led by independent chair Dr Keith Turner.

and environments. It is about regenerative tourism, which in simple terms means ensuring that tourism contributes positively to social, cultural, environmental, and financial outcomes.

10.5 Traditional approaches to tourism have placed a high weight on financial outcomes, with social, cultural, and environmental externalities generally considered to be a cost of doing business. MOP has taken a different approach by establishing social, cultural, and environmental constraints within which tourism must operate. Financial considerations are also important, but not at the expense of social, cultural, or environmental wellbeing.

ADDRESSING CONGESTION

10.6 The nucleus of the preferred masterplan option is the establishment of the systems and infrastructure required to address congestion issues in Milford Sound Piopiotahi. Access to Milford Sound is currently unregulated, which means that anyone can visit Milford Sound Piopiotahi at any time, using any mode of transport. This model has created a visitation profile with very strong demand around midday and relatively weak demand at other times of the day. This pattern has been exacerbated by significant growth in day visitation from Queenstown, where tours depart at around 7am and arrive in Milford Sound Piopiotahi at around midday. The boat operators in Milford Sound Piopiotahi have responded to this pattern of demand by ensuring that as many of their boats as possible are available to serve the midday peak. This is evident in the graph below which shows the number of boat passenger seats departing Milford Sound Piopiotahi by hour. Having the majority of boats on the water at midday creates a sawtooth pattern of demand across the day which reflects the 2-2.5-hour turnaround between cruises i.e. if most boats depart around 1pm then they cannot depart after 11am or before 3pm.

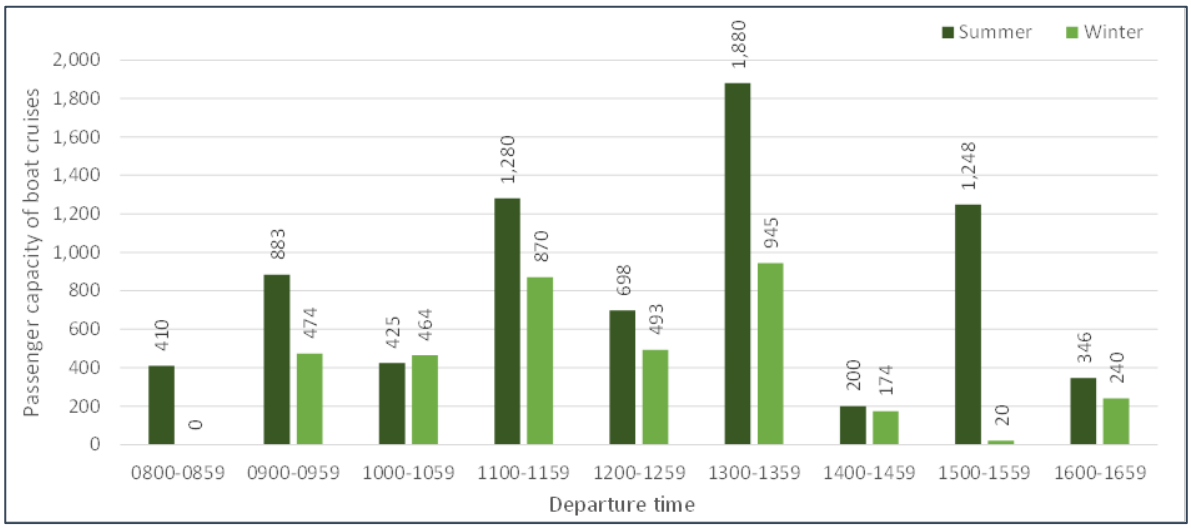


Figure 59: Number of boat passenger seats departing Milford Sound Piopiotahi by hour

10.7 While the behaviour of the boat operators might be rational from a short-term financial perspective, this pattern of demand puts significant pressure on the infrastructure and environment in Milford Sound Piopiotahi during peak demand periods. It also diminishes the visitor experience for those who are visiting Milford Sound Piopiotahi during peak demand periods, relative to a situation in which there is less congestion.

10.8 From a longer-term perspective, this pattern of demand is also sub-optimal for the boat operators because asset utilisation is relatively low when averaged across the day. Having assets lying idle for most of the day is not ideal for a capital-intensive business.

10.9 A foundation principle of the preferred master plan option is the development of a more uniform pattern of demand in Milford Sound Piopiotahi. Another principle is that visitor numbers should be capped at a level that is (a) sustainable for the destination; and (b) enjoyable for the visitor. The MOP team took the following factors into account when considering the optimal visitor cap for Milford Sound Piopiotahi:

- Impact on the environment.
- Impact on transportation infrastructure.
- Impact on visitor experience.
- Impact on commercial operators.
- Risk management/mitigation.

10.10 The consensus reached across all MOP workstreams was that a cap of 1,000 visitor arrivals per rolling hour would be appropriate for Milford Sound Piopiotahi. The use of a rolling hour ensures that a maximum of 1,000 visitors can arrive in any 60-minute period, which avoids the potential for 1,000 to arrive at 12:59pm and another 1,000 to arrive at 1:01pm. Regulating arrivals in this way provides the certainty required for optimal infrastructure and experience development in Milford Sound Piopiotahi, while allowing the risk of a natural disaster to be managed more effectively (a key consideration given the relatively high likelihood of a rupture in the Alpine Fault in the next 50 years). It is also critical from a transport planning perspective, which is a key element of the master planning process.

10.11 A managed transition from the current departure profile to a more uniform profile will be required to minimise impacts on commercial operators. Most operators are likely to be supportive of having a more uniform departure schedule in the long-term, but consultation with commercial operators will be required to navigate the transition in a commercially sustainable manner.

TRANSFORMING THE SUB-REGION

10.12 The imposition of an hourly visitor cap addresses the issue of congestion in Milford Sound Piopiotahi and will play a fundamental role in the sustainable management of the destination in the future. It will also help to create a more uniform pattern of demand across the day by shifting some demand from the peak midday period to other times of the day. However, with around 50% of visitors to Milford Sound Piopiotahi currently doing day trips from Queenstown, the imposition of an hourly cap will mean that some of these visitors are no longer able to make these trips due to the lack of boat capacity at their favoured times.

10.13 The project team views this as an opportunity to transform the wider subregion (Milford Road corridor and Te Anau) into a viable multi-night destination. The aspiration is for the subregion to evolve from being a gateway and service centre for Milford Sound to being a regional destination in which Milford Sound is one of several world-class experiences. This transition is a critical success factor for several reasons:

- Growing the overnight visitor market in the subregion will grow demand for morning and afternoon/evening experiences in Milford Sound Piopiotahi (due to visitors only being only a 1-2-hour drive from Milford Sound Piopiotahi rather than 4-6 hours if they're staying in Queenstown). This will help drive a more uniform pattern of demand across the day, resulting in better asset utilisation for commercial operators.
- Most of the value from tourism is created by overnight visitation. Hosting more overnight visitors will create more business and employment opportunities in the subregion, while enhancing social amenity for subregion residents.
- Enhancing Te Anau's status as a visitor hub will create opportunities for growth elsewhere in the Southland region. Tourism development generally occurs within short driving distances from key accommodation hubs, so the success of Te Anau will create ripple effects further into the region.
- Te Anau becoming a more significant visitor hub expands New Zealand's tourism network, which benefits visitors, and promotes greater regional dispersion of tourism benefits, which benefits the subregion, Southland, and NZ Inc.

10.14 Many of the elements in the preferred master plan option have been designed to assist with this transformation. Some of the benefits of the transition will accrue to Milford Sound Piopiotahi

through the creation of a more uniform demand profile, but most will accrue to the wider subregion due to the increase in social and economic opportunities.

10.15 Financial sustainability is another key principle of the master planning process. In practice this requires the creation of revenue streams that can be used to pay for the capital and operating costs associated with the proposed developments. The preferred option seeks to minimise the dependence on government funding lines in favour of revenues derived from user charges, henceforth referred to as “access pricing”. The MOP team considers the establishment of an access pricing model fundamental to the long-term success of Milford Sound Piopiotahi and the subregion.

CBA METHODOLOGY

10.16 The purpose of this analysis is to provide an initial understanding of the expected economic costs and benefits of the preferred master planning option for Milford Sound Piopiotahi. It is necessarily high-level due to the breadth and conceptual nature of the master planning process and is intended to be indicative only. The results presented should not be used for anything other than assessing the broad direction of travel presented in the masterplan. Further economic evaluation and business casing will be required as the concepts are refined and specified in greater levels of detail.

10.17 As discussed previously, the master plan considers and balances a wide range of complex issues and therefore needs to be evaluated as an integrated package rather than a series of independent components. Each component has a role to play in meeting the overarching objectives of the project, and it is not feasible at this stage of the process to evaluate specific components on a stand-alone basis.

10.18 The economic costs and benefits of the preferred option are assessed relative to maintaining the status quo at Milford Sound Piopiotahi in terms of development footprint and operating model. This means unrestricted access to Milford Sound Piopiotahi and no change in expected visitation patterns. The preferred option (as discussed in Section 9 and summarised above) seeks to implement robust and innovative destination management principles to deliver the social, cultural, environmental, and economic outcomes outlined in the project brief. This includes the following proposed interventions:

- **Imposing an hourly cap** on visitor arrivals to Milford Sound Piopiotahi to reduce congestion in Milford Sound Piopiotahi, improve the visitor experience, and spread demand more evenly across the day.
- **Implementing a managed access system** to manage visitor flows (and ensure they stay within the cap), improve the visitor experience, reduce the need for carparking infrastructure in Milford Sound Piopiotahi, and reduce carbon emissions. Key initiatives include encouraging greater use of coach services, limiting the number of carparks in Milford Sound Piopiotahi, and implementing a plan-and-book parking system.
- **Redesigning Milford Sound Piopiotahi** to enhance the visitor experience and improve safety and conservation outcomes. Key initiatives include developing a centralised visitor hub and interpretive marine centre in Milford Sound Piopiotahi, creating new walking tracks and observation points, redeveloping visitor and staff accommodation, and removing the fixed wing runway to improve connectivity and natural character.
- **Strengthening Te Anau as a visitor hub and gateway to Fiordland National Park** to encourage visitors to spend more time in the sub-region. Key initiatives include developing transport and experience hubs in Te Anau as the starting point for an immersive journey to Milford Sound Piopiotahi.
- **Extending the Milford corridor experience** by improving some of the existing destinations along the corridor (e.g. Cascade Creek and Knobs Flat accommodation nodes) and developing new

ones (e.g. new walking tracks, a trampers' hut to support a new multi-day walk[34], a "super track head" in the Lake Marian area[35], and a stronger park entry).

- **Establishing an access charge for visitors to Milford Sound Piopiotahi** to enable recovery of development and operational expenses and create a sustainable income stream that can be used to fund conservation projects and other local initiatives.

10.19 The costs and benefits of the preferred option are based on a range of assumptions, estimates and projections which are outlined in Appendix 4. Key inputs to the modelling process include:

- The value and timing of development and operating costs for the preferred option (relative to status quo) – refer to workstream 5.
- Long-term projections of demand for Milford Sound Piopiotahi with and without the preferred option, including the impact of access pricing on demand. The outputs from this process are presented in Appendix 4.
- A new regulated access model for Milford Sound Piopiotahi that encourages more people to travel on low-carbon buses.
- Removal of the fixed wing runway, with retention of access for rotary aircraft. This is discussed further below.
- Various assumptions regarding long-term changes in visitor behaviour in response to the preferred option including:
  - Higher shares of visitors to Milford Sound Piopiotahi overnighting in the subregion over time (but not precluding day tripping from Queenstown or elsewhere).
  - Higher tourism expenditure in the subregion over time due to the increase in overnight visitation (length of stay) and the expansion in commissionable tourism product.
- The assumption that the transition to a carbon-neutral bus fleet would be funded by private operators over the next decade, as part of their normal capital investment programmes. A cost is included in the CBA to represent the higher capital cost of a carbon-neutral bus compared with a fuel-driven bus.

LONG-TERM DEMAND PROJECTIONS

10.20 Long-term demand (visitation) projections for Milford Sound Piopiotahi have been developed for three main scenarios to help inform the cost-benefit analysis (CBA) process:

1. **Unconstrained demand** – this scenario assumes that there are no constraints on the number of people that can visit Milford Sound Piopiotahi. This is a theoretical scenario that is useful for understanding the potential demand for Milford Sound Piopiotahi in the absence of capacity or operational constraints.
2. **Status quo** – this scenario assumes that there is no material change in the development footprint and operating model at Piopiotahi Milford Sound. Under this scenario the current transport models and intra-day demand profiles persist, resulting in capacity constraints during peak demand periods. Some growth is achievable over time under this scenario, but this is mainly limited to shoulder and off-peak periods.
3. **Preferred option** – this scenario assumes that the preferred option is implemented. Under this scenario demand is managed to spread visitor flows more uniformly across the day, and a modal shift from private vehicles to buses is implemented. This does not preclude day tripping from

[34] The Mistake Creek overnight walk.

[35] The Whakatipu Super Track Head node.

Queenstown, but it does impose an hourly limit on the number of visitors that can arrive in Milford Sound Piopiotahi of around 1,000 per rolling hour. The imposition of an hourly limit on arrivals will reduce congestion while gradually creating a more uniform pattern of demand across the day (in conjunction with the development of the wider subregion as a visitor hub). This will allow Milford Sound Piopiotahi to accept more visitors during peak days and months, while improving the visitor experience.

10.21 Demand projections for the three scenarios have been developed with and without an access fee. Figure 60 assumes that entry to Milford Sound Piopiotahi remains free, while Figure 61 assumes that international visitors are charged a fee to access Milford Sound Piopiotahi. Tabulated summaries of the demand projections are presented in Appendix 4.

10.22 With no access fee visitor demand for Milford Sound Piopiotahi is projected to reach 1.9 million in 2070 under the unconstrained scenario compared with 1.2 million under the status quo scenario and 1.6 million under the preferred option scenario. Higher levels of demand can be accommodated under the preferred scenario due to greater uniformity in intra-day visitation patterns. This will result in better capacity and asset utilisation in Milford Sound Piopiotahi in the long-term.

10.23 These projections show that inherent (unconstrained) demand for Milford Sound Piopiotahi is expected to be strong. Accordingly, the focus of this project has not been on how to stimulate more demand, but rather on how organic growth in demand can be managed in a way that improves outcomes for visitors, locals, and the environment. Through the imposition of sound destination management principles, the master plan allows Milford Sound Piopiotahi to accept more visitors than under status quo conditions, while also improving social, cultural, and economic outcomes. This is achieved by imposing an hourly cap on visitator arrivals to Milford Sound Piopiotahi of 1,000 per rolling hour (compared with 2,000+ in the peak hour under the status quo) and investing in initiatives that will generate a more uniform pattern of demand and asset utilisation across the day.

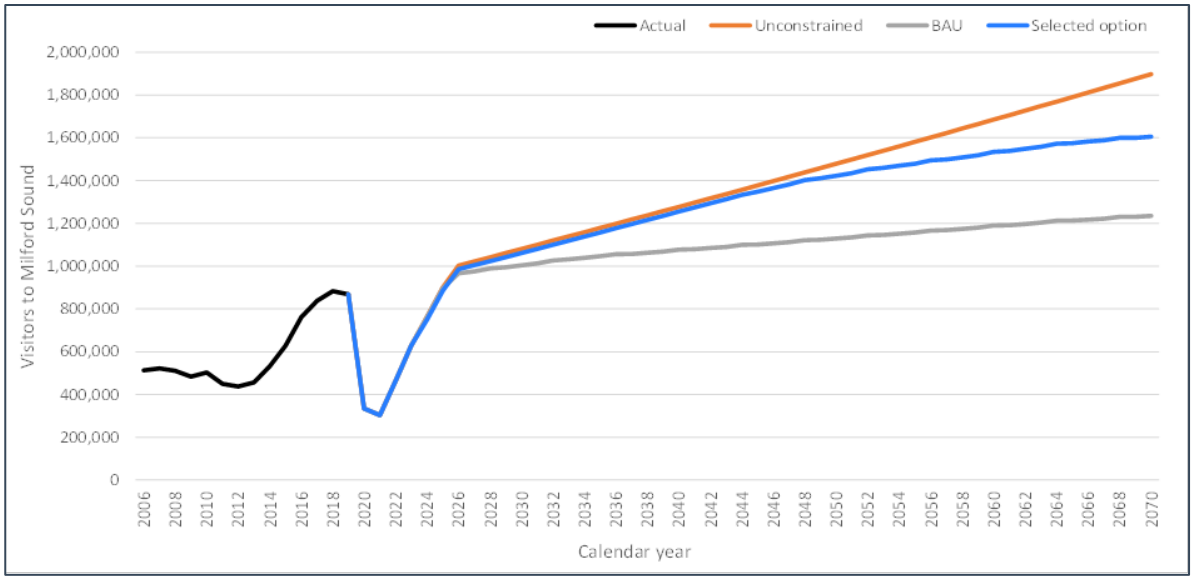


Figure 60: Demand projects for Milford Sound Piopiotahi with no access price

10.24 The impact of Covid-19 is notable in Figure 60, and there is still considerable uncertainty around what the recovery profile will look like. Current projections being used by major tourism bodies and airports indicate a return to normality for international travel (which previously accounted for around 85% of demand in Milford Sound Piopiotahi) in 2025-26. It could be faster than this if the vaccines currently being rolled out are successful in curbing transmission.

10.25 There have been many global shocks over the past three decades that have impacted international travel flows including economic recessions, airline collapses and global pandemics.

Some of these had material short-term impacts on passenger movements, but passenger movements always reverted to the long-term growth path once the effects of the shock passed.

10.26 We believe that the effects of Covid-19 will also pass, despite the current situation in some of our key inbound markets. The most likely long-term outcome of the Covid-19 crisis is a global vaccination programme and integration of health checks into border control processes to reduce cross-border transmission of infectious diseases.

10.27 The graphs below show how various shocks have impacted visitor arrivals to New Zealand over the past 33 years. This long-term view gives us confidence that the inbound tourism market will eventually revert to trend growth – the only question is how deep the immediate impact will be and how long the recovery will take.

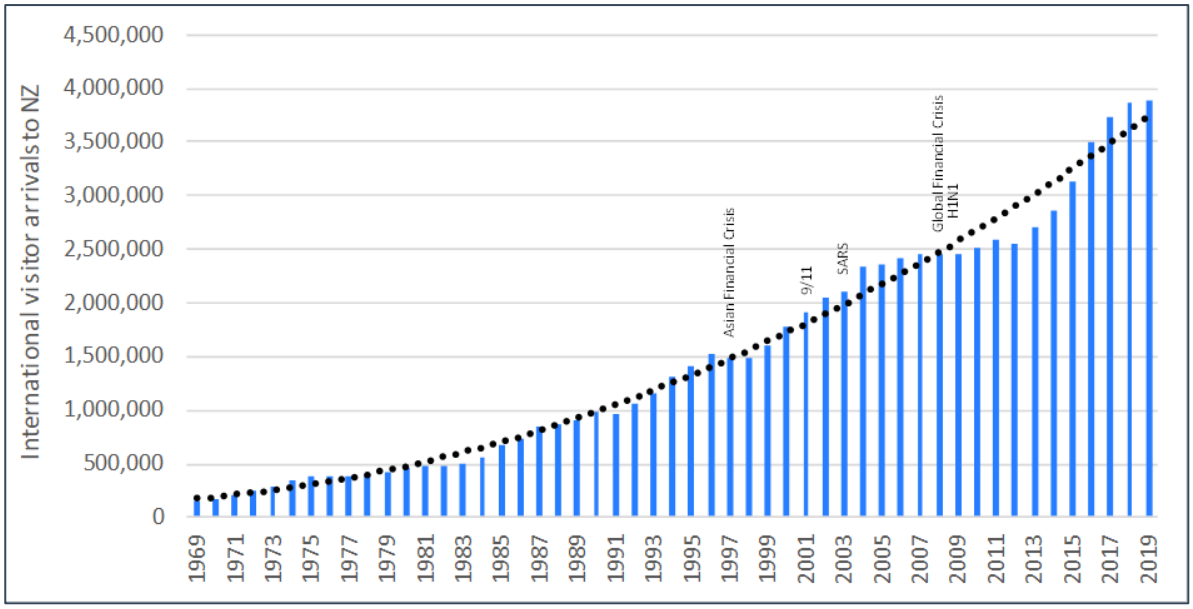


Figure 61: International visitor arrivals to New Zealand

THE IMPACT OF ACCESS PRICING ON DEMAND

10.28 The preferred option recommends the establishment of an access price to (a) recover development and ongoing operational expenses; and (b) create a sustainable income stream to fund local projects and conservation initiatives. This is consistent with the principles of regenerative tourism which are based on the premise that tourism should enhance a destination by 'giving back' to the land and people. It is anticipated that the access price would be a uniform charge on all international visitors for entry to the park that is independent of the transport mode used. It is assumed that park entry would continue to be free of charge for New Zealanders.

10.29 The impact of an access price on demand for Milford Sound Piopiotahi will depend on four main factors:

1. The level the access price is set at.
2. When the access price is implemented.
3. Who is required to pay the access price.
4. The sensitivity of Milford Sound Piopiotahi visitors to changes in price (price elasticity).

10.30 Sensitivity analysis was used to predict the demand response to different access pricing scenarios. To keep the modelling manageable the level of the access price was varied while the other three factors were held constant. Within each scenario it was assumed that:

- The access price starts in 2025.

- The access price only applies to international visitors.
- The price elasticity of demand for Milford Sound Piopiotahi is relatively inelastic at -0.44.

10.31 The elasticity parameter of -0.44 is based on a review of international literature, benchmarking of existing prices for Milford Sound Piopiotahi against other popular attractions in New Zealand, and the iconic status of Milford Sound Piopiotahi within the New Zealand tourism experience. The results of the literature review and benchmarking are provided in Appendix 4. These results are broadly consistent with analysis undertaken by the Department of Conservation during the recent Great Walks Differential Pricing trial which suggested that international demand is relatively inelastic (around -0.25) for the Milford, Routeburn, and Kepler Tracks, and around -0.4 for the Abel Tasman track.

10.32 The graph below provides projections of annual visitation to Milford Sound Piopiotahi based on assumed access prices of $0, $50, $100, $150, and $200. These prices represent an increase in the overall price paid by visitors to experience Milford Sound Piopiotahi, over and above the circa $150 per person cost of transport and a boat cruise (which is expected to remain the main activity undertaken by visitors).[36] The main impact of access pricing is observed in the year the access price is implemented, reflecting a "re-basing" of demand in response to the change in the overall price (original price plus the access price) of visiting Milford Sound Piopiotahi. The long-term growth rates are relatively similar under each scenario once the initial impact has passed.

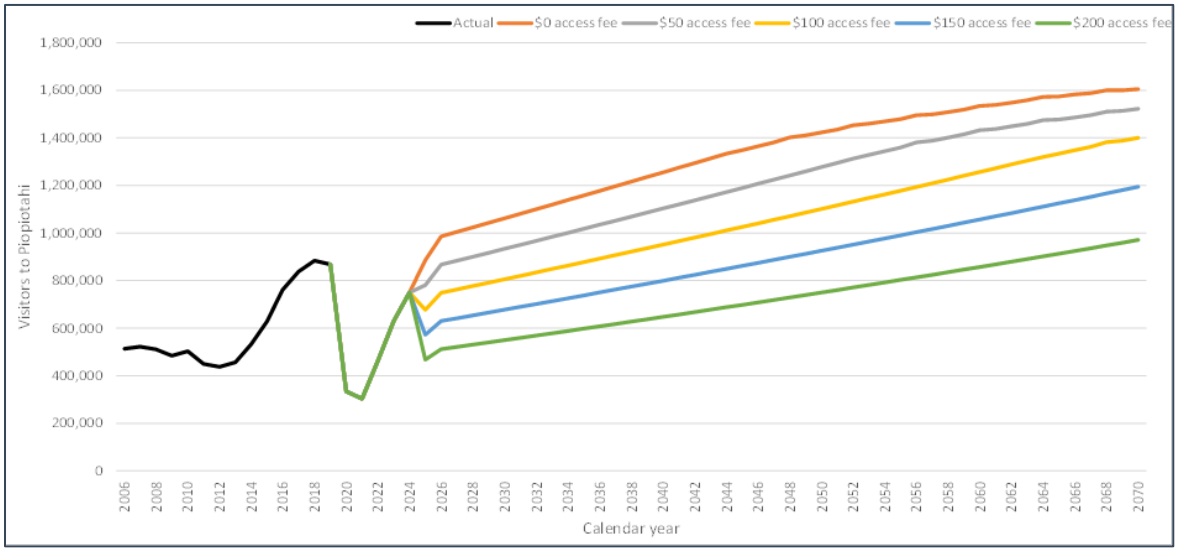


Figure 62:Demand projections for Milford Sound Piopiotahi under different access prices

10.33 Figure 62 reflects an inverse relationship between access price and demand, which is consistent with economic theory. The analysis also reveals a trade-off between the access price and the wider economic benefits of visitation to Milford Sound Piopiotahi to the local economy.

10.34 If the sole objective was to maximise the revenue raised through the access price, an access price of around $175 would achieve this. The trade-off that needs to be considered is the impact of the resulting decrease in visitation to Milford Sound Piopiotahi on the wider subregional tourism economy. Given the importance of Milford Sound Piopiotahi to the regional tourism offering, visitors that are priced out of Milford Sound Piopiotahi may choose to bypass the region altogether, resulting in lower levels of tourism spend in the subregion (e.g., Te Anau) relative to

[36] This is how access pricing is handled for the purpose of the elasticity calculations in the CBA, i.e. the access price is treated as an increase in the price of a visit to Milford Sound Piopiotahi from a base of $150 per person, rather than assuming a base of $0. The cost of $150 per person may be slightly conservative due to the impact of Covid-19 on pricing, in which case the demand projections may also be slightly conservative (because the change in price may be smaller than estimated if the base price is higher than estimated).

not having an access fee. In general, the higher the access price is set, the greater the impact will be on the local tourism economy.

10.35 This is not an argument against an access price – there are good reasons why an access price should be implemented. But it does mean that the level of the access price needs to be set with access revenue and the wider tourism economy in mind. This trade-off is explored further within the context of the cost-benefit analysis to enable informed decision-making around access pricing.

COST-BENEFIT ANALYSIS

10.36 The costs and benefits of the preferred option have been estimated for the Milford Sound Piopiotahi subregion (local impact) and New Zealand (national). All impacts have been assessed relative to the status quo (no material change in development footprint or operating model in Milford Sound Piopiotahi) to isolate the incremental costs and benefits of the preferred option. All costs and benefits are expressed in net present value (NPV) terms using Treasury's recommended discount rate of 6%.

10.37 The incremental costs are based on detailed bottom-up capital cost estimates for each element of the preferred option, as well as estimates of ongoing operating, maintenance, and asset renewal costs across the 50-year assessment period. These were developed by the infrastructure workstream and are presented in workstream report 5. A summary of the resulting annual cost profiles are provided in Appendix 4.

10.38 The initial capital expenditure costs account for around 55% ($229 million) of the overall cost, with subsequent life-time costs accounting for the remaining 45% ($189 million).

Table 25: Incremental costs of preferred option for Milford Sound Piopiotahi subregion (50-year NPV)

	Initial capex	Opex	Asset R&M	Asset Renewal	Total
Milford Sound Piopiotahi	90,407,395	67,870,911	14,728,616	16,047,627	189,054,548
Corridor	91,639,830	14,216,623	15,125,000	8,093,638	129,075,091
Te Anau	47,062,254	34,716,745	7,807,278	10,509,378	100,095,655
TOTAL	229,109,479	116,804,279	37,660,894	34,650,643	418,225,295

10.39 Potential costs that have not been quantified include:

- The cost of subsequent planning and business case processes prior to implementation of the preferred option.
- Costs associated with establishing the necessary governance and management structures to implement the preferred option. It is assumed that there will be no change to the ongoing governance and management costs relative to the status quo, beyond the initial set-up costs.
- Acquisition/compensation and legal costs associated with the severance, variation, or reassignment of existing concessions (if required). These costs are not relevant to the CBA because they represent a transfer of wealth rather than an additional resource cost, but they are relevant to the financial business case because they need to be funded.
- Cruise ship passengers – see below.

10.40 We would expect all of these costs to be recovered from the access price revenue and would therefore recommend factoring them into the access price, which we anticipate would have two components – a 'cost recovery' component to ensure all relevant costs are covered by the access price, and a 'community and conservation premium' which would be invested into local community and conservation initiatives.

10.41 The benefits of the preferred option fall into four broad categories:

1. **Incremental tourism GDP** - this captures the estimated uplift in GDP associated with spending by visitors to Milford Sound Piopiotahi. Only direct GDP impacts are considered, which are conservatively estimated to be 35% of the projected increase in tourism expenditure. At the subregional level it is assumed that 100% of the GDP impact is incremental. At the national level it is assumed that 50% of the GDP impact is incremental, with the other 50% being a transfer effect from other regions. Domestic and international expenditure effects are included in the GDP impact at the subregional level, while only international expenditure effects are included at the national level (domestic expenditure is considered to be a transfer effect).
2. **Income from the access price** - this is estimated by multiplying the number of people who are required to pay the access fee by the value of the access fee. It is assumed that only international visitors will be required to pay the access fee, with domestic visitors continuing to enjoy free access to Fiordland National Park. At the subregional level it is assumed that 100% of the access price revenue is incremental. At the national level it is assumed that 50% of the access price revenue is incremental, with the other 50% being a transfer effect from other regions.
3. **Incremental social benefits** - this encompasses user and non-user benefits accruing to New Zealand residents. The user benefits capture the uplift in consumer surplus that domestic visitors to Milford Sound Piopiotahi receive due to the preferred option being implemented. This is driven by higher levels of amenity caused by the various experiential enhancements, as well as an uplift in domestic visitation due to greater overall throughput in Milford Sound Piopiotahi. The non-user benefits capture the uplift in option and existence values[37] to New Zealand residents caused by the preferred option being implemented. These are equivalent to the user values multiplied by the annual probability of a New Zealand resident visiting Milford Sound Piopiotahi.
4. **Carbon benefits** - this captures the value of the reduction in carbon dioxide equivalent (CO2-e) associated with the transition to non-fossil fuel vehicles in Milford Sound Piopiotahi. The transition is assumed to occur gradually over the next decade as commercial operators upgrade their fleets, with all vehicles servicing Milford Sound Piopiotahi being electric or hydrogen by 2030. The environmental benefit is estimated as the expected reduction in CO2-e multiplied by the current price of carbon ($38).

10.42 Potential benefits that have not been quantified include:

- **Cultural benefits** - the preferred option aligns much more closely with mana whenua values than the status quo and is therefore expected to be beneficial to mana whenua and Maori more generally. The Cultural Values and Aspirations workstream provides more detail on these important benefits although it has not tried to value it in monetary terms.
- **ROI on investment in conservation initiatives** – access pricing provides the opportunity to raise revenue to cover capital and operating expenses, as well as funding investments in discretionary initiatives such as conservation projects. However, the amount of money available for investment in conservation is uncertain because it depends on the access price, which is yet to be determined. There is also uncertainty around the return on investment that would be achieved from investing in conservation initiatives, because the conservation initiatives are yet to be defined. Due to these constraints, any surplus funds raised through access pricing (in excess of expected capital and operating expenses) that are available for investment in conservation initiatives are counted at face value i.e., a $10 million surplus that is available for investment in conservation initiatives is valued at $10 million.
- **Cruise ship passengers** – see below.

[37] "Option values" capture the uplift in an individual's wellbeing generated by the knowledge that she has the option of going to Milford Sound Piopiotahi in future if she chooses to. "Existence values" capture the uplift in wellbeing generated by knowledge that Milford Sound Piopiotahi exists, regardless of whether or not an individual ever plans to visit.

TREATMENT OF CRUISE AND FIXED WING PASSENGERS

CRUISE SHIP PASSENGERS

10.43 The guidance received from the MOP governance group is that cruise ship access to Milford Sound Piopiotahi should be restricted (e.g. preventing cruise ships from operating at the same time as local boat cruises or other shore-based activities) or eliminated entirely and that, if cruise ships remain in Milford Sound Piopiotahi, cruise ship passengers should pay the same access price as visitors accessing Milford Sound Piopiotahi by land or air. The impact of these decisions will depend to a large extent on the response of cruise ship operators to the changes, which is currently uncertain. If cruise ship operators remain in Milford Sound and comply with any restrictions, CBA benefits will be higher than estimated here if the access price exceeds the current price paid by cruise ship operators of circa $12 per passenger.

10.44 If cruise ships cease operating in Milford Sound, the financial impact of this will depend on whether Environment Southland is still able to extract visitation fees from the operators (e.g. if operators switch to another sound) and the amount of the fees. If no visitation fee is payable, Environment Southland would lose its annual revenues from cruise ship operators, which are estimated at around $2.9 million for the 2018/2019 season. We assign a very low risk to cruise operators exiting the New Zealand market altogether due to restrictions on access to Milford Sound Piopiotahi and have therefore not considered this scenario in our analysis.

FIXED WING PASSENGERS

10.45 The guidance received from the governance group is that the fixed wing runway should be removed to enable optimal regeneration and reconfiguration of Milford Sound Piopiotahi. It is assumed that the removal of fixed wing services will halve the number of people visiting Milford Sound Piopiotahi by air, from around 40,000 per annum to 20,000. This change is included in the cost benefit analysis through the following effects:

- A reduction in visitation to Milford Sound Piopiotahi by air of around 20,000 passengers per year - it is assumed that the 20,000 passengers who continue to access Milford Sound Piopiotahi by air would do so in rotary aircraft (helicopters), which are catered for in the master plan. It is assumed that 25% of the displaced passengers (around 5,000) would visit Milford Sound Piopiotahi by road instead, so the net impact on Milford Sound Piopiotahi would be a reduction of around 15,000 passengers per year (around 1.4% of total annual visitors in 2030). This would represent a loss of income for commercial operators in Milford Sound Piopiotahi of around $1.2 million per year, based on a net value per passenger of $80 (the average cost of a boat cruise).
- The avoidance of future capital and operating costs associated with the fixed wing runway. Current estimates indicate that the runway requires upgrades costing around $25 million within the next decade to meet safety and climate change requirements, and that a similar investment would be required in 25 years' time. The removal of the fixed wing runway would negate these expenses.

10.46 The removal of the fixed wing runway will therefore have only a modest impact on Milford Sound Piopiotahi in terms of visitation and revenue, while removing major capital expenses as well as ongoing maintenance and operating costs. However, there may be a more significant impact on the current providers of fixed wing services, the majority of which operate out of Queenstown. The net impact on these fixed wing providers will depend on the extent to which they can develop new services to compensate for the reduction in services to Milford Sound Piopiotahi. This could include flyovers of Milford Sound Piopiotahi, services to Te Anau to connect with scheduled bus services into Milford Sound Piopiotahi, and services to new destinations. Under the worst-case scenario, where no new services can be developed, revenue from fixed wing operations would reduce by around $12 million per annum (around 30,000 passengers per year at an average of $400 per passenger). However, we would expect the net impact to be smaller than this, particularly if fixed wing operators are given sufficient notice of the intention to remove the runway (which will give them enough time to develop new services). Irrespective of the long-term impact, the removal of the fixed wing runway will be distressing for some fixed wing operators so a long notice period and extensive consultation with these operators is recommended.

IMPACT ON MILFORD SOUND PIOPIOTAHI SUBREGION

10.47 The Milford Sound Piopiotahi subregion is representative of the Fiordland regional tourism area which encompasses the commercial hubs of Te Anau, Manapouri and Milford Sound Piopiotahi, as well as Fiordland National Park.

10.48 It is assumed that all costs associated with the preferred option are borne by the Milford Sound Piopiotahi subregion, on the basis that the subregion will be the primary beneficiary of the investment. The overall cost is estimated to be $418 million in NPV terms.

10.49 The resulting benefits depend on the level of the access price. With no access price the subregional benefit is estimated at $512 million, resulting in a net benefit of $94 million and a benefit-cost ratio (BCR) of 1.23. The primary driver of this benefit is the $504 million uplift in tourism GDP enabled by the increase in visitor throughput at Milford Sound Piopiotahi (relative to the status quo) and a higher percentage of visitors to Milford Sound Piopiotahi staying overnight in the subregion.

10.50 With a $50 access price the net benefit is $457 million and the BCR is 2.09. The imposition of a $50 access price creates an income stream of $521 million that more than offsets the $418 million lifetime cost of the preferred option but reduces the level of additional tourism GDP to $345 million due to the impact of the price rise on visitation to Milford Sound Piopiotahi and the wider subregion.

10.51 With a $100 access price the net benefit is $628 million and the BCR is 2.50. The resulting access price revenue of $869 million is more than twice the lifetime cost of the preferred option, while the additional tourism GDP in the subregion is further reduced but still positive at $169 million.

10.52 With a $150 access price the net benefit is $609 million and the BCR is 2.46. Access price revenue increases further to $1.03 billion, but the impact on tourism GDP becomes negative.

10.53 With a $200 access price the net benefit is $410 million and the BCR is 1.98. Access price revenue remains at just over $1 billion but tourism GDP contracts by around $201 million.

Table 26: Costs and benefits of preferred option for Milford Sound Piopiotahi subregion ($m, 50 year NPV)

	No access price	$50 access price	$100 access price	$150 access price	$200 access price
Incremental costs (NPV)					
Piopiotahi	189.05	189.05	189.05	189.05	189.05
Corridor	129.08	129.08	129.08	129.08	129.08
Te Anau	100.10	100.10	100.10	100.10	100.10
TOTAL	418.23	418.23	418.23	418.23	418.23
Incremental benefits (NPV)					
Additional tourism GDP	504.42	345.71	168.84	-15.90	-201.04
Income from access price	0.00	521.92	869.13	1,034.92	1,021.08
Social benefits	0.02	0.02	0.02	0.02	0.02
Environmental benefits	7.91	8.11	8.32	8.53	8.74
TOTAL	512.34	875.75	1,046.31	1,027.56	828.80
Net benefit	94.12	457.52	628.08	609.34	410.58
BCR	1.23	2.09	2.50	2.46	1.98

10.54 These results highlight the trade-off that exists between the access price and the wider economic benefits to the subregional tourism economy. While it is not within the scope of this CBA to advise on an appropriate access price, the results of this analysis suggest that an access price of

between $50 and $100 per international visitor would achieve the dual outcomes of covering the lifetime cost of the preferred option while also growing the subregional tourism economy. If raising additional revenue to fund projects and conservation initiatives is a priority, then an access price towards the upper end of this range may be advisable.

10.55 It is important to note that the additional tourism GDP benefits are mainly delivered by the proposed changes to the access and operating models for Milford Sound Piopiotahi. These changes will enable the throughput of visitors at Milford Sound Piopiotahi to be expanded beyond status quo levels, resulting in additional visitation and expenditure in the subregion.[38] They will also incentivise long-term changes in visitor flows, with more visitors to Milford Sound Piopiotahi eventually choosing to stay overnight in the subregion (while not precluding day trips from Queenstown which are expected to remain popular). We consider these changes to be essential to the long-term success of Milford Sound Piopiotahi as both a place and a visitor destination.

10.56 There are also some projects within the preferred option which could be removed without materially affecting subregional tourism or access price outcomes. However, these projects play an important role in responding to the non-economic aspects of the project brief and are consistent with the principle of using tourism to create places and experiences that New Zealanders value and can be proud of.

10.57 We strongly support the idea that tourism should be used to enhance the wellbeing of New Zealanders in the broadest sense possible, and that using some of the financial proceeds from tourism to invest in positive social, cultural and environmental outcomes for New Zealanders is both appropriate and essential.

IMPACT ON NEW ZEALAND

10.58 The cost of implementing the preferred option is the same for New Zealand as it is for the subregion ($418 million in NPV terms).

10.59 The national tourism GDP and access price income benefits are lower than the subregional benefits because it is assumed that 50% of the additional visitor spending in the Milford Sound Piopiotahi subregion is transferred from other regions in New Zealand. This is a potentially aggressive assumption, but we believe it is appropriate given the high levels of uncertainty. Also, domestic tourism expenditure is not included in national tourism GDP benefits because it is considered to be a transfer between regions.

10.60 With no access price the national benefit is estimated at $246 million, resulting in a net benefit of -$172 million and a benefit-cost ratio (BCR) of 0.59. The net benefit becomes marginally positive at an access price of $50 (BCR of 1.02) and reaches its highest levels at access prices of between $100 and $150 (BCRs of 1.23 and 1.20 respectively). With an access price of $200 the net benefit becomes marginally negative again, with a BCR of 0.97.

[38] As demonstrated in section □, inherent (unconstrained) demand for Milford Sound Piopiotahi is expected to be strong. Accordingly, the focus of this project has not been on how to stimulate higher demand, but rather on how demand can be managed in a way that allows visitor volumes to grow while also improving outcomes for visitors and locals.

Table 27: Costs and benefits of preferred option for New Zealand ($m, 50-year NPV)

	No access price	$50 access price	$100 access price	$150 access price	$200 access price
Incremental costs (NPV)					
Piopiotahi	189.05	189.05	189.05	189.05	189.05
Corridor	129.08	129.08	129.08	129.08	129.08
Te Anau	100.10	100.10	100.10	100.10	100.10
TOTAL	418.23	418.23	418.23	418.23	418.23
Incremental benefits (NPV)					
Additional tourism GDP	210.90	129.98	40.96	-51.45	-144.01
Income from access price	0.00	260.96	434.57	517.46	510.54
Social benefits	27.68	28.68	29.06	29.08	29.08
Environmental benefits	7.91	8.11	8.32	8.53	8.74
TOTAL	246.49	427.73	512.90	503.62	404.34
Net benefit	-171.74	9.50	94.67	85.39	-13.88
BCR	0.59	1.02	1.23	1.20	0.97

10.61 These results are relatively consistent with the subregional analysis in terms of suggesting that having an access price will deliver better outcomes for New Zealanders than not having one. However, both the subregional and national analyses demonstrate the trade-offs that exist between the access price and wider tourism benefits, as well as signalling an access pricing threshold beyond which net benefits start to decline. The final decision on access pricing will need to consider a range of factors including:

- The challenges involved in implementing and enforcing an access price.
- How much revenue needs to be raised through access pricing to provide a sustainable funding model that covers all costs and generates enough surplus to fund local projects and conservation initiatives.
- The importance of driving regional tourism growth.

CONCLUSIONS

10.62 The results of our analysis indicate that the net benefit of the preferred master plan option for Milford Sound Piopiotahi is strongly influenced by the access fee imposed on international visitors. This is because:

- International visitor demand for Milford Sound Piopiotahi, and the wider subregion, will be influenced by the cost of visiting Milford Sound Piopiotahi. In general, the higher the access price is set, the lower the demand for Milford Sound Piopiotahi will be relative to not having an access price. This is based on an assumed demand elasticity of 0.44 for Milford Sound Piopiotahi.
- The increase in GDP caused by additional international visitor expenditure is a net benefit in a cost-benefit analysis. The imposition of an access fee causes international visitors to spend more money in the subregional and national economies, although there is a point at which increasing the access price reduces international visitor expenditure due to the impact of the access price on visitor volumes.

10.63 The net benefit of the preferred master option ranges between $103 million with no access price and $636 million with an access price of $100 at the subregional level, and between -$168 million with no access price and $98 million with an access price of $100 at the national level (Figure 63).

10.64 These outcomes produce benefit-cost ratios (incremental benefits divided by incremental costs) of between 1.25 (no access price) and 2.52 ($100 access price) at the subregional level, and between 0.60 (no access price) and 1.23 ($100 access price) at the national level (Figure 64)

10.65 These results indicate that implementation of the preferred master plan option would be beneficial for the Milford Sound Piopiotahi subregion under all access pricing scenarios, and beneficial for New Zealand with an access price of between $50 and $200.

Figure 63 Summary of net benefits of preferred option

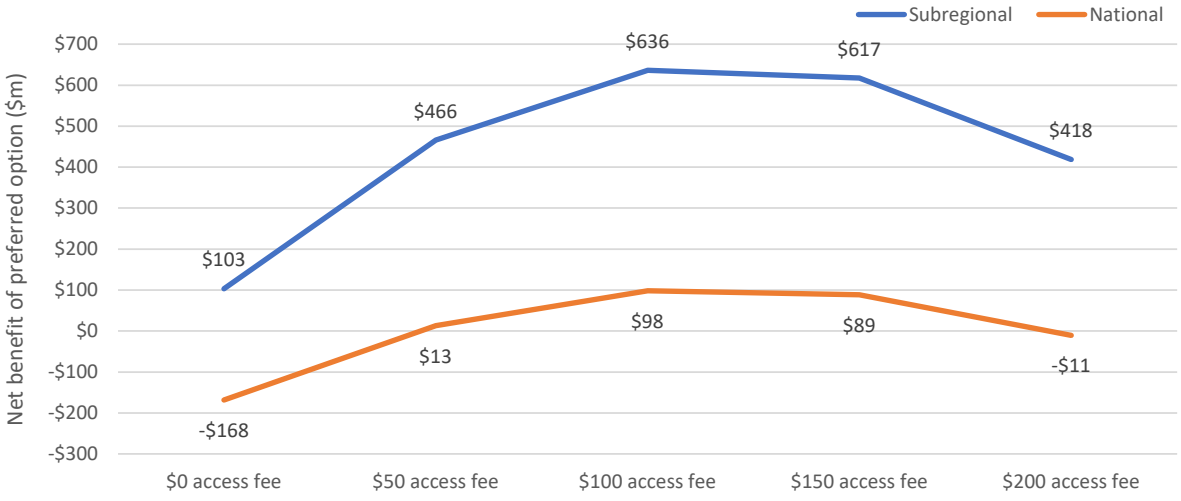
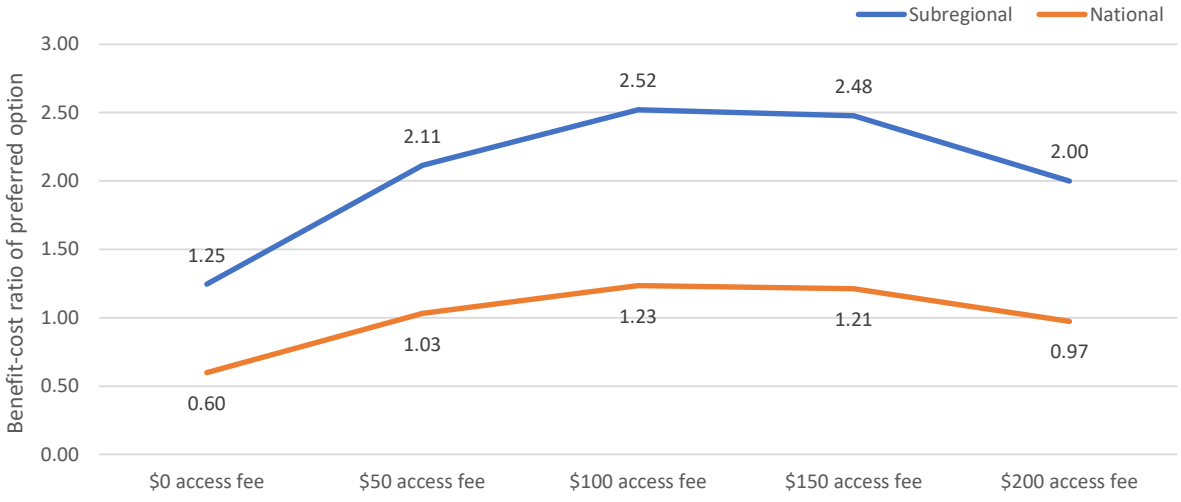


Figure 64 Summary of benefit-cost ratios of preferred option



While these results provide strong support for the imposition of an access price, consideration must be given to the distributional impacts of different pricing levels, and in particular the trade-off between access price revenue and the wider economic benefits of visitation to Milford Sound Piopiotahi to the local economy.

While it is not within the scope of this CBA to advise on an appropriate access price, the results of this analysis suggest that an access price of between $50 and $100 per international visitor would achieve the dual outcomes of covering the lifetime cost of the preferred option while also growing the subregional tourism economy. If raising additional revenue to fund projects and conservation initiatives is a priority, then an access price towards the upper end of this range may be advisable.

11 SUMMARY AND CONCLUSION

11.1 Milford Sound Piopiotahi has for a long time not delivered on its full potential for Mana whenua, the people of Southland, New Zealanders, or visitors. The piecemeal approach to planning over many decades, hampered by governance, management and system constraints, has led to sub-optimal outcomes across many areas.

11.2 The Milford Opportunities Project has recommended significant change across multiple work streams. Many of the recommended changes will be a significant departure from business as usual and will be met with scepticism from certain operators, stakeholders and sectors of the public.

11.3 None-the-less change is required as busines as usual will not deliver the desired conservation, social, cultural, or economic outcomes. The disruption caused by Covid-19 represents a significant opportunity to bring about a long overdue reset of the way in which Milford Sound Piopiotahi is governed, planned, redeveloped, and managed.

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- Visitor Activity Counter Data – Department of Conservation.
- Campsite User Statistics – Department of Conservation.
- Permissions Database (Concessions) data – Department of Conservation. Including concession permissions by place and activity returns for Freshwater Basin activity (boat cruises) and Milford Aerodrome (landings) activity.
- Great Walk Bookings data – Department of Conservation
- Online Customer Reviews from the 'TripAdvisor' service.
- Online Customer reviews from the 'Rankers' service.

- Queenstown Airport – Passenger History Data, 2005-2019.
- Milford Sound Tourism – Tourist Summary data (passenger numbers)
- International Visitor Survey data – Ministry of Business, Innovation and Employment / Statistics New Zealand
- New Zealand Tourism Forecasts 2019-2025, Ministry of Business, Innovation and Employment, 30p.
- Strategic Direction for the Review of the Regional Coastal Plan for Southland, Feb 2019, p.10 (data sourced from Harbourmaster)
- NZTA telemetry counter data for the Homer Tunnel (vehicle use)
- NZTA State Highway Vehicle Count data for other selected counters along SH 94
- Milford Road vehicle data - Milford Road Alliance, Ministry of Transport
- Statistics NZ (2018). Commercial Accommodation Monitor: February 2018 – Fiordland. Statistics New Zealand Wellington. 13p. (and viewing of available Accommodation Survey Data up to Nov 2019)
- New Zealand Visitor Activity Forecast data –prepared by FreshInfo for the Tourism Attraction Programme (for Ministry of Business, Innovation and Employment, New Zealand Trade & Industry, Tourism New Zealand).
- Monthly Regional Tourism Estimates data – Ministry of Business, Innovation and Employment
- Tourism Industry Aotearoa (2020). COVID-19 Tourism Industry Survey Summary Report – May 2020. 29p.
- Statistics New Zealand (2020). Cruise ship traveller and expenditure statistics - data, YE June 2020.
- New Zealand Cruise Association (2020). 2018-19 and 2019-20 Cruise Ship Schedules data.

APPENDIX 1: VISITOR MONITORING PLAN

INTRODUCTION

Making ongoing improvements in the outcomes generated from the Milford Opportunities Project master plan will be dependent on having an implementable, high quality monitoring and reporting programme in place. A suite of key progress indicators will provide the basis for this programme.

Until decisions are made about what recommendations from the Master Plan are adopted, this visitor monitoring programme should be treated as an outline and preliminary in nature. It should be reviewed, amended, confirmed, and implemented once the Master Plan's implementation steps are decided. It is likely, regardless of the future final governance and management approaches adopted, that the programme would need to be a multi-agency monitoring programme.

The proposed monitoring programme outlines a meaningful, robust, consistent, and sustainable set of indicator data collection (and reporting) approaches. The ongoing programme is designed to provide evidence of visitor and stakeholder outcomes from the plan and its component initiatives.

The key outcome is to produce a visitor monitoring programme that:

- Establishes the framework and develops the metrics for a comprehensive baseline data set.
- Integrates a range of information such as conservation, visitor information, infrastructure, hazard, and economic data in one report.
- Establishes a legacy project enabling multi-agency on-going monitoring for measuring the outcomes of planned initiatives.
- Identifies the owners/funders of the key monitoring programme components.
- Identifies a single integrated governance entity supported by partnering agreements to coordinate ongoing relationships and processes.
- Builds upon and integrates current data collection tools and/or base data opportunities.
- Prioritises collection of only those data that have (or could be reasonably anticipated to have) a clear use rationale.

MONITORING SUSTAINABILITY ISSUES

Once the appropriate set of monitoring indicators are settled on by the partners, the cost of administering the programme is likely to be one of the key ongoing sustainability risks. Consequently, focus wherever possible has first been placed on identifying pre-existing data collection options and tools that can meet monitoring needs. Where gaps are apparent the objective is to focus on developing low-cost solutions to address them.

Ongoing cooperation from the key agencies and industry participants to provide cost effective access to existing monitoring tools, indicator data and/or activity participants (for survey/interview etc.) will be required. It is beneficial to develop a monitoring partnering agreement or similar (which can be either formal or informal) between the overarching integrated governance entity (should one be established) and all partner entities.

This agreement will come with an outline of roles and responsibilities and explain the value of each data collection step (including how the end data are used and its overall value). This

prevents partners 'forgetting' over time why certain data are required and inadvertently cutting collection, particularly as staff in organisations change.

MONITORING PURPOSES AND SCOPE

The underlying rationale for these monitoring tools is to:

- track changes associated with initiatives.
- identify patterns and trends.
- **improve insights for enhancing management actions and success.**
- improve positive visit qualities and minimise negative impacts or risks.
- improve and integrate the baseline data collection coverage across partner groups thereby enhancing the general information available for management, decision making and strategy (both internal and shared).
- build on existing systems wherever possible.

The following simplified monitoring framework content headings are proposed in (Table 1):

Table 28: Proposed monitoring framework content headings.

Key Indicator themes	Core data measures
Visitor Numbers & Use Patterns	DOC visitor activity counts Vehicle and/or passenger numbers Accommodation user numbers Primary purpose: visitor number estimates in different settings/contexts along with trends and patterns.
Visitor Profiles & Experiences	Tourism profile statistics Visitor/user experience review summaries Targeted survey monitors Primary purpose: visitor profile summaries and tracking of visit outcomes (e.g., visit experiences, satisfactions, impact perceptions) in different settings/contexts to highlight base and/or emerging features (positive and negative).
Socioeconomic Impact	Socioeconomics – high level indicator stats Socioeconomics – localised indicator stats Primary purpose: Demonstrate positive and negative outcomes (social and economic) from different visit experience opportunities, facilities, sites and management actions
Physical Setting Status	Infrastructure status Hazard status Environmental / Conservation status and performance Primary purposes: demonstrate the condition/state of targeted features and highlight any risk factors to sustainability of the visitor experiences in the settings (facility/natural) being used to deliver them.

Under these headings consideration has been given to:

- What data monitoring options are already in place.
- Pre-existing baselines.
- Gaps / improvements required to better meet project needs.

PROPOSED MONITORING SYSTEM COMPONENTS

Taking all of this into account, Table 2 summarises a range of potential indicators and appropriate monitoring tools, methodologies and sources identified as being available and/or potentially required to meet project monitoring needs. This Table is supplemented in table 3, a summary inventory of current tools and sources.

Table 29: Proposed Monitoring Programme options for tools, methodologies, and sources
(related to MOP tourism initiatives with overlapping and integrated applications across multiple organisations, purposes and scales).

Subject Area (and subthemes)	Methods	Led by	Timing	Rationale
Visitor Number and Use Pattern Indicators	Mixed across different data indicator types/sources	Mainly by site/activity managers and service providers, with targeted partnerships.		Baseline visitor quantity data resource to show changes across a variety of contributing components.
Visitor Sites/Destinations - Visit Counts.	Continuous counts of visit activity numbers based on a system of electronic counters at key tracks, facilities, roads (calibrated or mediated as required). Aiming for consistent data sortable for patterns by hour, day, week, month, year, multi-year. Open to expansion based on any opportunities identified to use other methods (e.g., using mobile phone data, links to wifi hotspots etc.).	Led / coordinated by single governance entity (if established). Mostly implemented by DOC (as visitor counter system and concessions manager), or by strategic partnership/ arrangement with visitor service providers, preferably via a dedicated Milford Opportunity management entity. It is anticipated the data would be drawn from existing management data collection processes, some of which may require enhancements to fit (e.g., count calibrations, standardised time referencing, definition consistencies, incorporating new methods). Some providers may be required to initiate new strategic data collection and reporting approaches – however this would represent enhanced core baseline business management information for their operations (could sell the benefits of this by returning the business concerned a summary report back annually). New partnerships and arrangements may be required to incorporate new methodology options (e.g., mobile phone/wifi data etc via a telco partner).	Continuous data recording with periodic downloads (annual, monthly or 'as required') to secure and integrated database systems. Note: Technology now allows for visitor counter data to be sent back daily from the field via cellular / wifi network.	To track visitor numbers, patterns, and trends across a variety of sites. This can indicate success from specific management initiatives (such as marketing key sites) or market changes (such as changing visitor site / experience preferences). To improve and integrate the baseline data collection coverage across more sites (and partners) thereby enhancing general management. Provides core baseline data needed to understand other impacts (conservation, infrastructure, hazard, and visitor).
Visitor Sites/Destinations - Concession Activity Returns.	Provider records of customer / activity numbers at selected priority sites - via enhanced concession activity returns to DOC (where concessions apply) or directly from enhanced service		Continuous data recording by providers with monthly downloads to secure and integrated database systems as part	To provide a systematic indicator of concessions-based levels of visitor use (especially for key concession sites).

Subject Area (and subthemes)	Methods	Led by	Timing	Rationale
	provider records (by partnership or concession arrangements). Aiming for consistent data sortable for patterns by hour, day, week, month, year, multi-year.		of concession reporting.	
Boat Cruises and Passengers at Milford Sound Piopiotahi.	Counts of vessels, sailings, and passengers on Milford Sound Piopiotahi cruises segmented by vessel, day, departure time, and passenger type (e.g. NZ vs Overseas, adult vs. child etc.). Monitor relative vessel occupancy levels (capacity vs passengers)	Led / coordinated by single governance entity (if established). Continuation and extension of current ticketing/booking-based methods by Milford Sound Tourism (or by equivalent integrated governance entity) and/or enhanced concession-returns based reporting – as applicable.	Continuous data recording reported monthly, but each report shows daily passenger counts by sailing time and adult vs. child.	To track visitor numbers, patterns and trends at Milford Sound Piopiotahi and track progress towards a more uniform intra-day visitation profile. To monitor boat capacity in Milford Sound Piopiotahi and track progress towards a more uniform intra-day boat capacity profile.
Aircraft Landings and Passengers at Milford Sound Piopiotahi.	Counts of aircraft, landings, and passengers at Milford Sound Piopiotahi by aircraft type, day, origin, flightpath, landing time, and passenger type (e.g., NZ vs Overseas, adult vs child etc.). Monitor relative aircraft occupancy	Ministry of Transport (or equivalent asset management entity) for landings. Air Service Providers for aircraft type and capacity, flight and passenger features (using current ticketing/booking information and/or enhanced concession-returns based reporting – as applicable).	Continuous data collection and periodic reporting to enable real-time monitoring of aircraft movements and seat capacity.	To monitor the number of aircraft movements, passenger movements and seat capacity at Milford Sound Airport.

Subject Area (and subthemes)	Methods	Led by	Timing	Rationale
	levels (capacity vs passengers)			
Road Access Users – Te Anau to Milford Sound Piopiotahi.	Numbers, patterns and vehicle -types for vehicle movements (at the FNP threshold, Lake Marian Car Park, and at Homer Tunnel). Monitor relative vehicle occupancy levels (capacity vs passengers).	Led / coordinated by single governance entity (if established). Implemented by Milford Road Alliance (or equivalent governance/asset management entity). Refined from supplementary and/or enhanced monitoring to that undertaken for State Highway 94 by NZTA and through the MOT.	Continuous data collection and reporting to enable real-time monitoring of vehicle movements.	To monitor vehicle movements at an hourly frequency and track progress towards a more uniform intra-day visitation profile from Te Anau to Milford Sound Piopiotahi and a modal shift from private vehicle to coach. Including monitoring of passenger numbers (see indicators above).
Visitor Profile and Experience Indicators	Mixed across different data indicator types/sources	Mainly by site/activity managers and service providers, with targeted partnerships.		Baseline visitor experience quality data resource to show changes across a variety of evaluative components.
Profile of visitors to Milford Sound Piopiotahi and related sites.	Regular post-visit online surveys of visitors to Milford Sound Piopiotahi and priority related sites conducted through operators and online booking channels, or by site management agencies (i.e., DOC) Periodic high level scan analyses of	Led / coordinated by single governance entity (if established). Implemented by Milford Sound Tourism or by DOC across wider sites as part of partnerships and application of ongoing /enhanced internal visitor monitoring and survey programmes. Note: Investigate strategic partnership options with tertiary institutions. Reference to targeted data from the International Visitor Survey (MBIE) and domestic visitor indicator surveys (if available).	Surveys should be conducted on an ongoing basis and integrated into operator business practice. Periodic downloads (annual, or monthly as	To understand and monitor the profiles of visitors to Milford Sound Piopiotahi and related sites through time.
Experience evaluations & opinions of visitors to Milford Sound Piopiotahi and related sites.				To understand and monitor the experience evaluations, opinions and satisfaction levels of visitors to Milford Sound Piopiotahi and related sites through time.
Tourism characteristics of visitors to Milford Sound Piopiotahi (& region).				To understand and monitor the broader tourism characteristics of visitors to

Subject Area (and subthemes)	Methods	Led by	Timing	Rationale
	online trip review contents for specific priority sites, destinations & experiences (to track priority issues and identify potential emergent issues). Targeted visitor experience monitoring surveys (supplemented with focus groups where more in-depth exploration is required). This can be combined with visitor profiling needs. Strategic initiation of deeper investigations is only required on an as needed basis. For example, when annual monitoring flags and issue requiring greater examination. Open to expansion based on any opportunities identified to use other methods (e.g., using mobile phone data, links to wifi hotspots etc).		appropriate) to secure and shareable database systems. Annual scans of primary online review indicator data (primarily in Trip Advisor). Wider review exploration/ monitoring surveys on as-required basis.	Milford Sound Piopiotahi & the region e.g., nights spent in the sub-region, transport mode, expenditure, etc.
Visitor volume indicators via transport and accommodation monitoring.	Visitor volume indicators via accommodation	Led / coordinated by single governance entity (if established).	Periodic downloads (annual, monthly	To track changes from initiatives. To identify patterns and trends.

Subject Area (and subthemes)	Methods	Led by	Timing	Rationale
	monitoring (e.g., booking receipts, guest numbers, guest nights by date/time) directly from providers and/or via Accommodation Data Programme (MBIE) Transport sector provider data subject to coordinated availability.	Preferably incorporated in strategic partnership/ arrangements via a dedicated Milford Opportunity management entity.	or other as required) to secure and shareable database systems.	To improve insights for enhancing management actions and success. To improve visit qualities. To improve and integrate the baseline data collection coverage across more partner groups, thereby enhancing general management information (both internal and shared).
Socioeconomic Impact Status Indicators	Mixed across different data indicator types/sources	Mainly by sector management organisations predominantly using official statistics or collated data sources, with targeted partnerships.		Baseline socioeconomic data to track community changes potentially associated with initiatives.
Socioeconomic status of individuals, groups, communities.	Selected Statistic NZ socioeconomic indicator variables (e.g., from Census data, Business demography statistics etc.) applicable at local Te Anau area (to SA2 level) scale. Selections customised by purpose from the data at individual, family, household, business, housing levels and more etc.	Led / coordinated by single governance entity (if established). Including partnerships with Fiordland RTO, Southland District, Statistics NZ.	Updated as released from official sources.	To understand socioeconomic changes and identify material losses/gains over time associated with individuals, population groups, businesses, local communities, and local sub-regions etc.
Tourism expenditure in Fiordland RTO	MBIE's Monthly Regional Tourism Estimates (MRTEs)	Led / coordinated by single governance entity (if established). MBIE and Fiordland RTO. Coordinated via a integrated governance entity. Possibly including	Monthly	To monitor expenditure levels in the Milford Sound Piopiotahi sub-region and track progress towards the targeted growth in expenditure.

Subject Area (and subthemes)	Methods	Led by	Timing	Rationale
		private data sources (e.g., Paymark, Marketview card spend data).		
Accommodation statistics for Milford Sound Piopiotahi and the corridor	Daily capacity, occupancy, revenue statistics and some visitor profile features for all establishments and sites in Milford Sound Piopiotahi and along the corridor.	Led / coordinated by single governance entity (if established). Coordinated with providers by Milford Sound Tourism (or equivalent governance/asset management entity) and DOC via an integrated governance entity.	Data should be reported monthly, but each report should provide daily statistics for the reporting month.	To monitor visitor numbers and expenditures via accommodation data including bookings, occupancy levels, revenues and some visitor profile features (from booking data)
Accommodation statistics for Te Anau and Manapouri.	Daily capacity, occupancy, revenue statistics and some visitor profile features for all commercial accommodation establishments in Te Anau and Manapouri.	Led / coordinated by single governance entity (if established). Implemented by Destination Fiordland in partnership with MBIE (e.g., Accommodation Data Programme)	Data should be reported monthly, but each report should provide daily statistics for the reporting month.	To monitor visitor numbers via accommodation data including bookings, occupancy levels, revenues and some visitor profile features (from booking data)
Concession revenue collected by DOC	Summary of revenue collected by DOC from concessionaries operating in Milford Sound Piopiotahi, or along the corridor.	Led / coordinated by single governance entity (if established). Implemented by DOC through its concession management and permissions database record.	Data should be reported at set standard periods.	To monitor concession revenues derived from Milford Sound Piopiotahi and the corridor.
Revenue derived from (any proposed) FNP access-related charges.	Establish a system to administer and manage any FNP access-related charges.	Led / coordinated by single governance entity (if established). Appropriate governance/asset lead management agency/entity.	Continuous data collection and reporting to enable real-time monitoring of FNP access-related revenue.	To monitor revenues derived from FNP access-related charges.
Costs associated with the operation and management of Milford Sound Piopiotahi and the corridor.	Establish a reporting system to collect and monitor the various costs associated with operating and	Led / coordinated by single governance entity (if established).	Continuous data collection and reporting to enable real-time	To monitor the costs associated with the operation and management of Milford Sound Piopiotahi and the corridor.

Subject Area (and subthemes)	Methods	Led by	Timing	Rationale
	managing Milford Sound Piopiotahi and the corridor.	Implemented by DOC, Milford Road Alliance, Milford Sound Tourism (or equivalent lead management agency/entity).	monitoring of costs.	
Physical Setting Status Indicators	Mixed across different data indicator types/sources	Mainly by statutory management bodies using required and established processes, with targeted partnerships.		Baseline data to ensure required standards are at least maintained.
General infrastructure Status/ Asset Condition (all built structures & equipment providing services for supporting visitor and related services /activities)	Inventory updating and condition/ engineering inspections	Led / coordinated by single governance entity (if established). DOC has well established, and systematic monitoring and inspection processes built into its asset lifecycle management system. This incorporates all DOC infrastructure. This utility could be expanded across some non-DOC infrastructure as part of partnership with a lead management agency/entity. Operators using specific equipment will have their own asset management /compliance processes.	Undertaken and reported as required for maintaining asset standards.	To ensure asset condition is maintained to required standards and service continuity is uninterrupted.
Specific - Power Supply	Demand Measurement	Led / coordinated by single governance entity (if established). Implemented by asset owner.	Hourly / Daily	Records maintained to the assess demand within the network and programme upgrades (should they be required) to meet visitor / commercial projections
Specific - Water Supply	Flow Monitoring			
Specific - Wastewater	Flow Monitoring			
Hazard mitigation	Site risk assessments and review/ update processes (linked to infrastructure and/or its hazard exposure). Camera monitoring of potential visitor (or operator) risk behaviours at priority activity/risk sites.	Led / coordinated by single governance entity (if established). DOC has well established, and systematic risk assessment, monitoring and inspection processes built into its asset lifecycle management system. This utility could be expanded across some non-DOC infrastructure as part of partnership with a lead management agency/entity, together building upon statutory compliance requirements.	Undertaken and reported as required for maintaining asset risk mitigation standards.	To ensure risk factors are identified, monitored, and mediated to required standards.

Subject Area (and subthemes)	Methods	Led by	Timing	Rationale
	Continuous environmental monitoring of avalanche conditions, seismicity, river levels etc.). Coordinated reporting of incidents associated with Milford Opportunity sites and activities (drawn from enhanced incident reporting systems by partners)	Most individual service providers will have health and safety conditions associated with facility and operational activity management requirements which can be incorporated into overarching monitoring systems as required. Established environmental monitoring continued by Milford Road Alliance, Geonet and Environment Southland as part of partnership with a lead management agency/entity, building upon statutory requirements.		
Water and/or air emissions	Extension of infrastructure/asset monitoring related to any emission conditions (e.g., water and/or air quality)	Led / coordinated by single governance entity (if established). Coordinated by DOC and Southland District Council as part of normal environmental operations and in partnership with a lead management agency/entity where site-specific monitoring and reporting requirements are identified in relation to MOP based activities or initiatives.	Undertaken and reported as required for maintaining environmental standards.	To ensure potential emission factors are identified, monitored, and mediated to required standards. To identify where conditions are improved.
Water quality	Regular water sampling to measure E. coli, heavy metals and possibly poly-aromatic hydrocarbons (PAHs - organic contaminants) in Freshwater Basin. Regular water sampling to measure E. coli at key camping / recreation sites.	Coordinated by single governance entity (if established). Led /implemented by Environment Southland.	• E. coli: fortnightly in summer. • Heavy metals / PAHs: bi-monthly • MCI: seasonally	• Low E. coli an indicator of effective wastewater treatment and an indicator of swimmable water. • Low heavy metals / PAHs an indicator of effective stormwater and marine vessel runoff management. • MCI an indicator of habitat diversity / quality and an overall indicator of in-stream health.

Subject Area (and subthemes)	Methods	Led by	Timing	Rationale
	Macro-invertebrate community index (MCI) monitoring in Cascade Creek and Lower Kiosk Creek.			
Establishment / spread of exotic / pest plants by visitors	Establishment and measurement of plant species composition in permanent plots along selected tracks, and along road corridor. Surveillance for plant pests along the road corridor and at areas of high visitor usage (we understand this is already undertaken by DOC).	Coordinated by single governance entity (if established). Led / implemented by Department of Conservation.	Plots: 3-5 yearly Surveillance: ongoing / several times per year.	Visitors boots and equipment a vector for spread. Walking tracks a key pathway for spread. Milford Corridor a key pathway for weed spread (especially at stopping points and during road maintenance activities).
Bird disturbance	Specific studies / research /surveys on indicator species (e.g., kea, Fiordland crested penguin / tawaki, whio) to monitor changes in: Behaviour Population size Breeding success Whio (repeat standardised surveys of selected rivers. Already undertaken by DOC)	Coordinated by single governance entity (if established). Led / implemented by Department of Conservation.	As determined by timing of specific research studies Quarterly counts of estuarine birds.	Kea, Fiordland crested penguin / tawaki and whio are Nationally Threatened species. Behavioural changes (human seeking or aversion behaviour), population size changes (due to mortality or breeding) and breeding success changes (due to disturbance related stress, predation, or other factors) can respond relatively quickly to direct and indirect human disturbance. Estuarine birds in general are vulnerable to human disturbance and vacate areas or suffer breeding failure.

Subject Area (and subthemes)	Methods	Led by	Timing	Rationale
	Seasonal counts of estuarine birds at Milford Sound Piopiotahi Long-term study on Tawaki currently being undertaken by the Tawaki Project at Harrison Cove (see http://www.tawaki-project.org/)			
Kea / visitor interactions	Specific studies on visitor / kea interactions (research programme currently being undertaken at Homer Tunnel, Lake McKenzie Hut, Cascade Creek)	Coordinated by single governance entity (if established). Led / implemented by Department of Conservation.	As determined by timing of specific research studies	Kea are a Nationally Endangered species. Human interaction with kea identified by the DOC Biodiversity team as an ongoing issue. Human / visitor interactions are one of the main threats to their survival.
Marine biosecurity	Already being undertaken. Active and passive surveillance for marine pests in high-risk areas (for example, high usage areas and areas of high conservation value).	Coordinated by single governance entity (if established). Led / implemented by MPI, MfE, DOC, Fiordland Marine Guardians, Environment Southland	Existing programme in place	Refer to Fiordland Marine Biosecurity Plan 2015/2016 – 2020/21
Disturbance to marine mammals	Specific studies / research on indicator species (e.g., bottle nose dolphins, NZ fur seals) to monitor changes in: Behaviour	Coordinated by single governance entity (if established). Led / implemented by Department of Conservation.	As determined by timing of specific research studies	Bottlenose dolphins are a Nationally Endangered species believed to be suffering from population losses in Doubtful Sound. Marine mammals vulnerable to ship strike and noise impacts.

Subject Area (and subthemes)	Methods	Led by	Timing	Rationale
	Population size (i.e., photo-identification / mark recapture)			

PROPOSED IMPLEMENTATION

Implementation of the monitoring programme outlined in Table 2 is clearly too extensive for any single organisation to undertake on its own. A key assumption is that a single integrated governance entity will be established and be appropriately resourced to lead the monitoring programme and coordinate all the contributing partners[39].

The range of partners (contributors) is to the programme is likely to be extensive, potentially including:

- Department of Conservation (DOC).
- Southland District Council.
- Environment Southland.
- Fiordland Regional Tourism Organisation (RTO).
- Great South.
- Milford Sound Tourism Ltd.
- Concessionaries.
- Service Providers (guiding, transport, accommodation providers – concession and other).
- Milford Road Alliance (with NZTA).
- Ministry of Transport.
- Ministry of Business, Innovation and Employment (MBIE).
- Statistics New Zealand.
- Providers for electronic card spend data (e.g., Paymark, Marketview).

The flow of monitoring data to the single integrated governance entity will come from multiple sources and via multiple routes. For illustrative purposes Figure 1 sets out how data are expected to flow to the lead entity. The entity will have agreements with Tier One partners (such as the Department of Conservation) to provide certain agreed data at a certain time. The organisation may also source data by agreement with Tier Two partners. These data may come directly from the Tier Two partners or indirectly via a Tier One partner (much in the same way data flows from some concessionaires to Milford Sound Tourism Ltd and then onto the Department of Conservation now). The lead entity will also likely source some data via commercial providers.

From experience it will be in the interests of the lead entity to have direct relationships and agreements with the core visitor monitoring data providers.

[39] If this does not occur, and a single integrated governance entity is not established then the Department of Conservation is likely to be best placed to adopt the core monitoring coordination role. It is also possible that even if a single integrated governance entity is established that the Department of Conservation, by agreement, is tasked with manging and coordinating the monitor programme on behalf of the new entity.

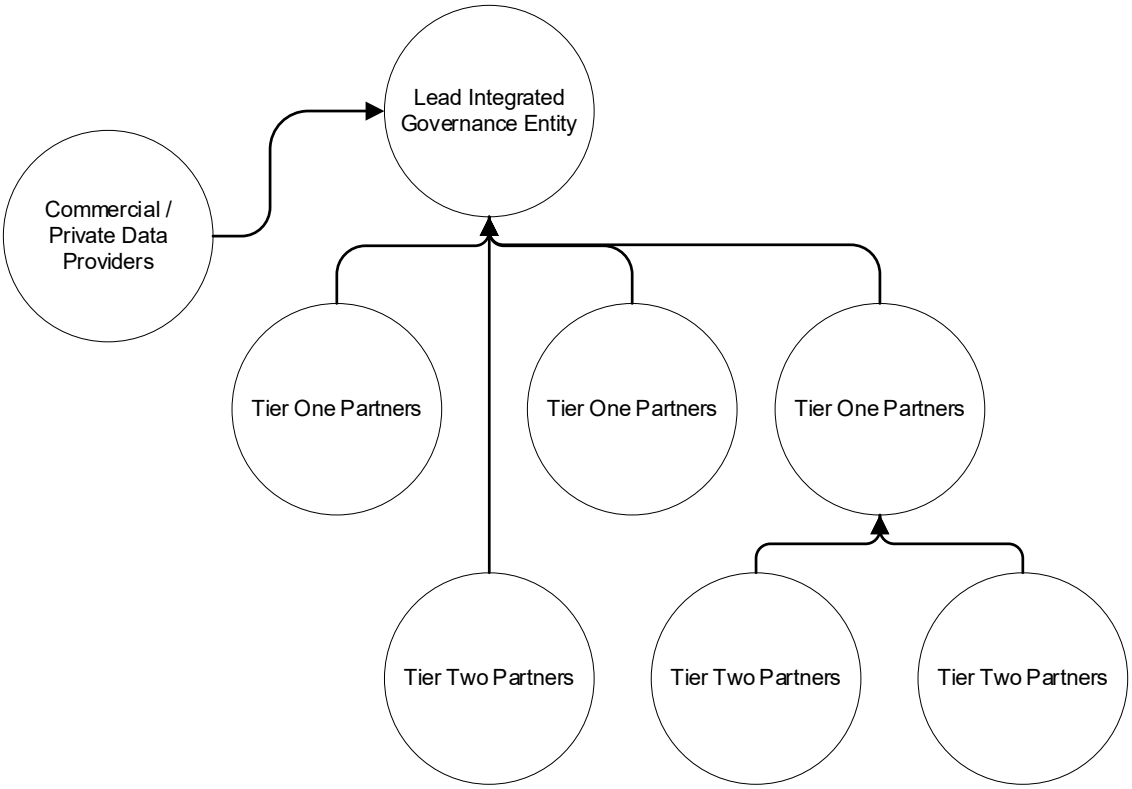


Figure 65 Indicate Data Flow to Lead Entity.

The data required by the lead entity will be much less than the partner entities are likely to be collecting each year for their own core work. However, the partner entities may not necessarily see the relevance of the data that the lead entity requires them to collect. For this reason, it is recommended that data provision is formally agreed in advance between all parties, and that they see regular outputs.

This data provision may be built into future legal agreements such as in concessions or in the reporting requirements of leases, through specific data agreements (such as separate visitor monitoring partnering agreements) or via a simpler memorandum of understanding (MOU) (Figure 2). The most appropriate approach will depend on what type of data is being requested and from whom.

It is likely that a combined MOU between all partners / entities which sits over the top of all other agreements would be beneficial in bringing organisations together for a common cause[40]. The most relevant and appropriate approach is likely be dependent on discussions between potential partners (on a case-by-case basis).

[40] The wording in this overarching MOU would be non-binding and simple state that all the undersigned organisations agree to work together in providing data necessary for the monitoring of visitor activities within Milford Sound Piopiotahi and surrounds. The objective of which is to aid the informed management and governance of the area. Any detailed agreements would then be outlined separately between organisations as appropriate.

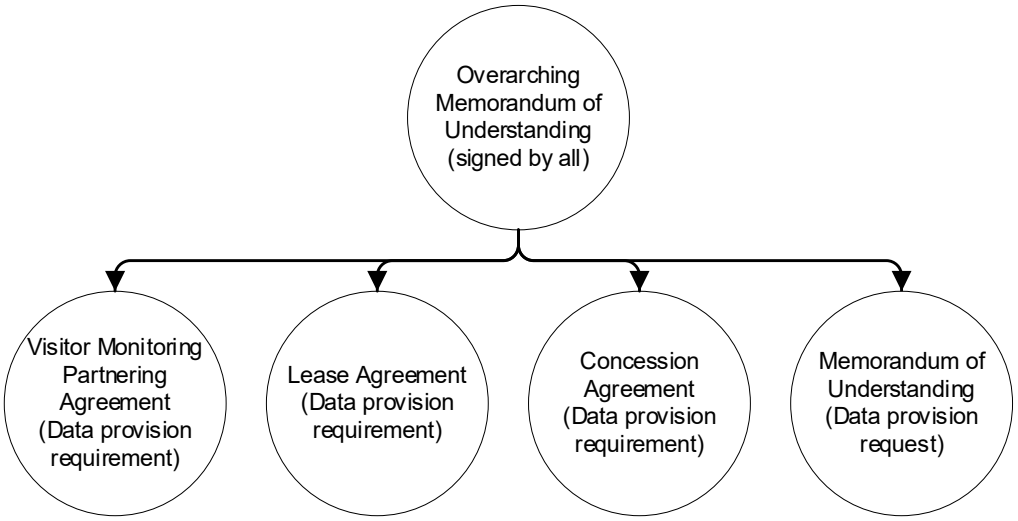


Figure 66 Indicate Suite of Data Provision Agreements

The types of data provision that should be included in agreements is indicated in Table 2.

It remains fundamentally important that the lead entity is properly resourced to use the data that is gathered and to provide findings and updates back to all the partners that are contributing. Failure to provide insights back to the partners will over time erode the desire to participate and provide quality data in a timely manner (often regardless of whatever agreements are in place).

The lead entity could do this via one or more of the following:

- Online status dashboard – high level (not data-detail specific) summary presentation presented in a webpage format based on highlights from annual reporting cycles. This would be updated annually.
- Summary status report - built around more detailed reporting requirements for a range of performance outcomes potentially linked into an annual report.
- Summary database(s) – provide tailored summary graphs and analysis to individual partners annually. Enable access to non-confidential database material on an as-required basis.

DRAFT PARTNERING AGREEMENT

It is not possible to establish a visitor monitoring data partnering agreement without first knowing the final governance and management structures and nature of the entities that will be involved in the longer term (see governance workstream report). As outlined earlier, other approaches (such as having data provisions built into concession requirements) may also prove to be more appropriate.

Key considerations for inclusion in any draft partnering agreements should include:

- Establishment of who the lead entity is.
- Agreement around the partnership in principle and around identified shared objectives.
- A commitment from the organisation to share the defined data on an ongoing basis at set times and in a set format with the lead entity.
- A commitment from the lead entity to share the defined analysis /data back to the partner organisation on an ongoing basis at set times and in a set format.

A draft agreement is outlined here:

DRAFT VISITOR MONITORING PARTNERING AGREEMENT

Dated XXXXXXXXXXXX

**Date once both parties have signed (Recipient to sign first)*

XXXXXX (Lead Entity)	
Street address	XXXXXXXX
Postal address	XXXXXXXX

XXXXXXXXXX (Provider)	
Street address	XXXXXXXX
Postal address	XXXXXXXX
Company / Incorporated Society / trust / charities services No.	XXXXXXXX

The Lead Entity, and organisations providing data (the Provider) accepts the terms of this Agreement, which includes this Signing Page, the Specific Terms, General Terms and any Schedules.

IMPORTANT: BY SIGNING THIS AGREEMENT, RECIPIENT ACKNOWLEDGES THAT:

- It has read and understood the terms of this Agreement.
- It has had the opportunity to seek advice about this Agreement before signing it.
- It is satisfied as to the performance of its obligations.

Signed under delegated authority for and on behalf of (Lead Entity) by:
_____ Authorised signatory Name: XXXXXXXXXXX Position: XXXXXXXXXXX Date: _____

Signed for and on behalf of the Provider by:
_____ Authorised signatory Name: XXXXXXXXXXX Position: XXXXXXXXXXX Date: _____

SPECIFIC TERMS

Clause references are to the General Terms.

Lead Entity Representative	
Name	
Phone	
Email	

Provider Representative	
Name	
Phone	
Email	

Background:
The (Lead Entity) and (Provider) have agreed to partner on the provision of data for a visitor monitoring plan for Milford Sound Piopiotahi and surrounds. Both entities have agreed that it is essential that visitor development is monitored so that the area's conservation values can be protected, and the visitor experience can be optimised. This is particularly true as the implementation of the Milford Opportunities Project is undertaken and optimised.

Documents	The documents forming part of this Agreement are: • The Signing Page. • The Specific Terms. • The General Terms. • Schedule 1 – Providers Data Provision and Reporting Requirements. • Schedule 2 – Lead Entities Data Provision and Reporting Requirements.
Purpose	This agreement sets out how the data provider will provide the specified raw data to the lead entity and how the lead entity will provide a data summary in return.
Objectives and Measures	The Provider will deliver all data in accordance with Schedule 1. The Lead entity will deliver all data in accordance with schedule 2.
Reporting	The Provider will report in accordance with Schedule 1. The Lead entity will report in accordance with schedule 2.
Recognition	The lead entity will acknowledge the data provider in any published or unpublished reports where said data is used.
Termination	Note: this links back to a clause in the General Terms and will normally state: "Clause XX of the General Terms applies".
Other Terms	Note: Other terms can be added if required.

GENERAL TERMS:

Outline general legal terms as considered appropriate. This should be inserted based on legal advice.

SCHEDULES

Note: The requirements in each schedule will alter depending on who the Provider is and what is being provided by way of data. The example below is for the provision of concession visitor numbers.

Schedule 1: Providers Data Provision and Reporting Requirements

	Content	Due Date
Data Provision	The following data will be provided in excel format in the provided template. Visitor number arrivals per concession site. Broken down by hour, day, week, month. Where multiple sites are visited on a single trip these should be recorded as one visitor (arriving at multiple sites).	Monthly
Reporting	In the event data is not collected the Provider will report to the Lead Entity when and why this has occurred.	Monthly

Schedule 2: Lead Entities Data Provision and Reporting Requirements

	Content	Due Date
Data Provision	The Lead Entity will make available to the Provider a consolidated database of all data it has provided on request.	On request.
Reporting	Each year the Lead Agency will deliver the Provider a visitation summary of: The providers own data, Overall concession visitation activity (so long as individual concessionaires' confidentiality is maintained).	Annually.

Table 30: Summary inventory of current potential monitoring information tools/sources (can be supplemented as new sources are revealed though partnership discussions)

Host/ Source	Programme	Topic	TA-RTO Level	Site specific	Activity specific	Visitor specific	Time series	Notes	Accessibility of data/ information
DOC	Visitor Activity Counter Network.	Visitor Activity Counts.		Y	Y		Y	GOOD USE LEVEL MONITOR - LIMITED TO INCLUDED SITES AND DATA CALIBRATIONS. Relevant to specific sites only. Only walking (some biking). Requires site-specific calibration process to determine the specific activity type & pattern before any estimates of absolute visitor numbers can be made. Indicator only, but the tool has high value from being in consistent national system, having recording continuity and (included) site-specific focus.	Public. Links to site data/reports available from DOC website. Master page link: https://www.doc.govt.nz/our-work/monitoring-reporting/visitor-asset-utilisation-reports/
DOC	Visitor Activity Outcomes Monitoring.	Visitor Monitoring Surveys (satisfactions, opinions etc).		Y	Y			SOME VALUE, LIMITED BY METHODOLOGICAL/APPLICATION INCONSISTENCIES. One-off or periodically repeated snapshots of activity types and participant responses to activity/site related questions/issues. Can assist with interpreting what site use counts represent as well as highlighting management issues	Mixed public. From DOC Publications or on request from DOC visitor monitoring team
DOC	Permissions Database (Concessions).	Concession Holders (sites & conditions).		Y	Y			GOOD FOR GAUGING SITE PROFILE/INTEREST - BUT LIMITED USE-LEVEL VALUE (see RETURNS). Currently an administrative tool = not designed to track patterns in activity content and change. Would require data recording changes, new variable records or specific analyses to generate activity, area or site-specific insights.	Not public. From request to DOC visitor concessions management team
DOC	Permissions Database (Concessions).	Activity returns - Fresh Water Basin (Boat Passengers).		Y	Y		Y	GOOD COMPLIANCE. Total monthly boat passenger numbers. (Data from Milford Sound Tourism)	Not public. From request to DOC visitor concessions management team
DOC	Permissions Database (Concessions).	Activity returns - Milford Aerodrome (Landings).		Y	Y		Y	GOOD COMPLIANCE. Total monthly aircraft landing numbers at Milford Aerodrome by provider (allows definition of types - fixed wing/helicopter)	Not public. From request to DOC visitor concessions management team

Host/ Source	Programme	Topic	TA-RTO Level	Site specific	Activity specific	Visitor specific	Time series	Notes	Accessibility of data/ information
DOC	Permissions Database (Concessions).	Activity returns - Other (guiding, vehicle, boating, filming/photog, non-recreation activity).		Y	Y		Y	CURRENTLY LIMITED BY LOW COMPLIANCE - IF IMPROVED COULD BE COMPILED TO CREATE GOOD SPECIFIC SITE/ACTIVITY INDICATORS. Activity returns to DOC from concession holder (sites/numbers) - technically potentially very useful, but actual completion compliance poor and limited enforcement. Some commercial confidentiality issues.	Not public. From request to DOC visitor concessions management team
DOC	Campsite fee receipts.	Campsite users.		Y	Y		Y	REASONABLE COMPLIANCE. Campsite fee receipts by site. (Underestimates numbers)	Not public. From request to DOC visitor management team
DOC	Asset Management Information System (AMIS)	DOC		Y			Y	IN-HOUSE ASSET MANAGEMENT SYSTEM. Includes asset monitoring and condition reporting. Visitor service/facility assets dominate.	Not Public. Internal operational management tools/ system.
DOC (and partners)	Biodiversity Monitoring and Reporting System	Indicators and measures from the NZ Biodiversity Assessment Framework		Y			Y	ESTABLISHED SYSTEM. The Biodiversity Monitoring and Reporting System provides DOC and others with consistent, comprehensive information about biodiversity across public conservation lands. The 3-tier system includes the processing of data, analysis and reporting – can be customised by biodiversity subject and focus areas as required.	Not public, managed by DOC. Information links at https://www.doc.govt.nz/our-work/monitoring-and-reporting-system/
Environment Southland	Various environmental monitoring	Water quality, flows/ flood hazard, air quality, environmental consents & compliances etc.		Y			Y	ESTABLISHED SYSTEMS. A wide variety of monitoring functions, including environmental conditions and biodiversity predominantly in non-DOC areas.	Mixed public, managed by Environment Southland. Information links at https://www.es.govt.nz/environment
Southland District Council	Various internal performance variables.	Various internal performance variables.						ESTABLISHED SYSTEMS. Some monitoring functions largely associated with internal reporting. From a visitor perspective some will be related to internal asset management	Not public from visitor management perspective. Information link https://www.southlanddc.govt.nz/my-southland/parks-and-reserves/

Host/ Source	Programme	Topic	TA-RTO Level	Site specific	Activity specific	Visitor specific	Time series	Notes	Accessibility of data/ information
								processes associated with various parks & reserves outside of DOC areas.	
NZ Cruise Association	Cruise Ship Visit Schedule.	Arrive/depart dates (by Port).	Y	Y	Y		Y	GOOD RECORD. Completed/Scheduled visits by different vessels (with pax number capacities) to ports - including Milford Sound with arrival and departure times/dates.	Public. Links at https://newzealandcruiseassociation.com/2019-20-cruise-ship-schedule/ & https://newzealandcruiseassociation.com/
MBIE	Monthly Regional Tourism Estimates (MRTE).	Tourism spend (international & domestic).	Y		Y	Y	Y	LIMITED USE BEYOND HIGH LEVEL (TA) SPEND TRENDS. Based on electronic card spend data by visitor origin, spend area (to TA level), tourism 'product' spent on (=business sector - ANZLIC). With reference to any particular area 'Visitors' are distinguished from residents. With Stats NZ.	Public. Links at https://www.mbie.govt.nz/immigration-and-tourism/tourism-research-and-data/tourism-data-releases/monthly-regional-tourism-estimates/latest-update/data-download
MBIE	Accommodation Data Programme (ADP).	Accom user data (by month, area, type).	Y			Int vs NZ	Y	LIMITED USE BEYOND HIGH LEVEL TRENDS: The Accommodation Data Programme (ADP) is a new (2020) programme providing monthly information about short-term accommodation activity at national, regional, and lower levels. It estimates the guest nights, occupancy rates and other measures relating to the accommodation industry. It replaced the Accommodation Survey (under a different methodology by Stats NZ) which was continuous for many years (until Sept 2019) and retains trend and pattern value which will build under the ADP with time.	Public. Links at https://www.mbie.govt.nz/immigration-and-tourism/tourism-research-and-data/tourism-data-releases/accommodation-data-programme/
Statistics NZ.	Accommodation Survey.	Accom user data (by month, area, type).	Y			Int vs NZ	Y	LIMITED USE BEYOND HIGHT LEVEL VISITATION TRENDS (INTERNATIONAL & DOMESTIC): Preceded the Accommodation Data Programme (ADP) with a continuous monthly record since 1996. Change in methodology means time series not maintained directly by ADP. Does show long term trends/ seasonal patterns pre-2020	Public. Links at https://www.mbie.govt.nz/immigration-and-tourism/tourism-research-and-data/tourism-data-releases/accommodation-data-programme/accommodation-survey-july-1996-september-2019/

Host/ Source	Programme	Topic	TA-RTO Level	Site specific	Activity specific	Visitor specific	Time series	Notes	Accessibility of data/ information
MBIE.	International Visitor Survey.	International Visitor Survey.	y			Y	Y	LIMITED USE BEYOND HIGH LEVEL VISITOR PROFILE TRENDS - CAN BE USED TO PROFILE INTERNATIONAL VISITORS: The International Visitor Survey (IVS) measures the expenditure, characteristics and behaviours of international visitors to New Zealand. It provides a systematic tool to track specific variables related to locations visited (TLA level) and spending by nationality. Of limited use as it is not specific to Milford Sound. At best it can indicate the visitors visiting 'Milford, Dusky, Doubtful Sounds - Fiordland' as part of a national park and then by selecting these visitors assessing other variables.	Public. See links at https://www.mbie.govt.nz/immigration-and-tourism/tourism-research-and-data/tourism-data-releases/international-visitor-survey-ivs/ AND https://www.mbie.govt.nz/immigration-and-tourism/tourism-research-and-data/tourism-data-releases/international-visitor-survey-ivs/international-visitor-survey-data-available-from-stats-nz/
NZTA (& Milford Rd Alliance).	State Highway Traffic Volumes.	Traffic volumes by time.		Y	Y		Y	GOOD RECORD FOR DESIGNATED SITES. Information is enhanced through the Milford Road Alliance. Long term trend indications, plus car/heavy traffic distinctions. Can be configured to produce hourly, daily, weekly, monthly patterns.	Public. See links at https://www.nzta.govt.nz/resources/state-highway-traffic-volumes/
Milford Rd Alliance (& NZTA).	Avalanche Control Programme	Avalanche risk levels.						ESTABLISHED MONITORING. Specialised weather /snowpack monitoring equipment is monitored to set hazard levels - maximising safety and minimising road closures.	Not public but managed by Milford Road Alliance.
Trip Advisor	Visitor Experience Reviews.	Visitor experiences by specific sites, experiences, providers		Y	Y	Y		GOOD RECORD FOR INCLUDED SITES. Overall assessment scores and review text content for specific sites, site experiences and providers. Enables overview of visitor feedback features	Public. Search target sites via the main Links at https://www.tripadvisor.co.nz/
Statistics NZ	Official data (Census and other official survey data).	Official data on individuals, families, households, businesses, industries by various	Y				Y	ESTABLISHED MONITORING ACROSS MULTIPE SOCIAL VARIABLES. Specific data selection for monitoring from the extensive range of individual, social and business variables would require consultation around need.	Public. Links at http://nzdotstat.stats.govt.nz/wbos/Index.aspx .

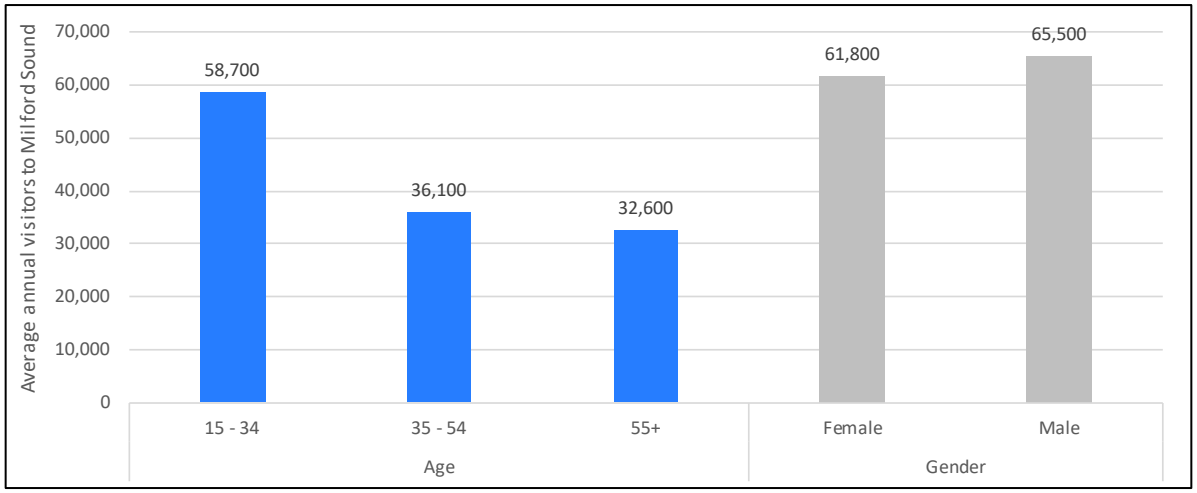
Host/ Source	Programme	Topic	TA-RTO Level	Site specific	Activity specific	Visitor specific	Time series	Notes	Accessibility of data/ information
		geographical area.							
Paymark/ Marketview	Electronic Card spend.	Electronic Card spend by business types, visitor origin, date, other customer data.	Y				Y	ESTABLISHED COMMERCIAL DATA. Commercial data services recording data associated with electronic card spending. Would probably require collective partnerships among organisations receiving payments for services and strategic customised subscription arrangements. These services have been used by individual businesses up to Regional Tourism Organisations (RTOs) for example.	Commercial costs for customised reporting options.

APPENDIX 2: VISITOR NATIONALITY PROFILES

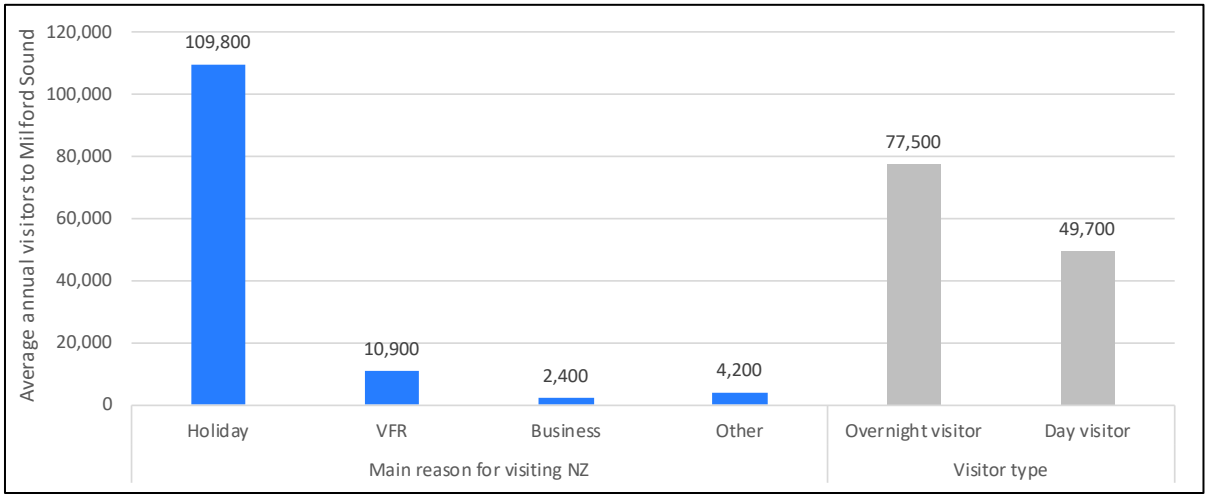
AUSTRALIA

Key insights:

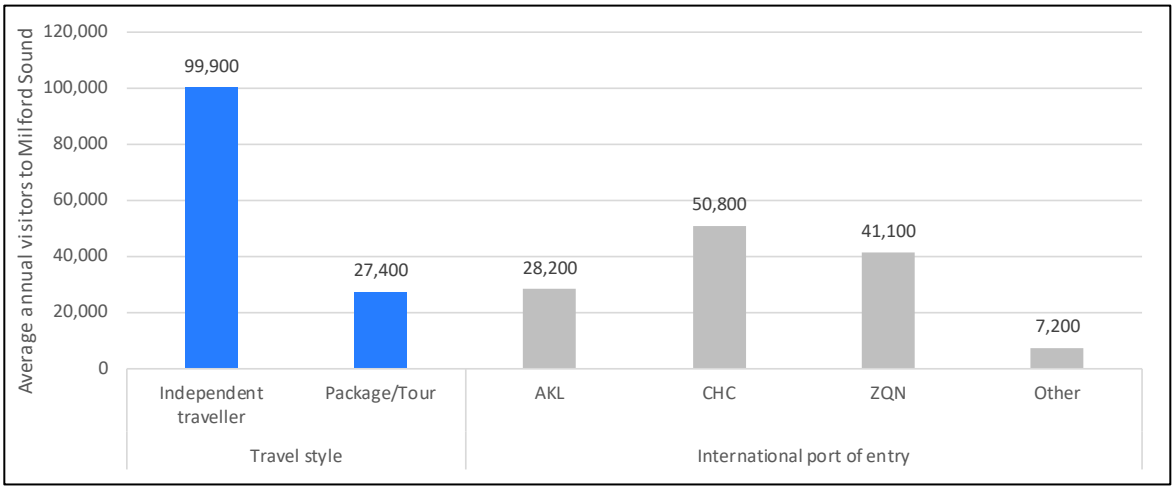
- The largest age cohort is 15–34 years, and the gender split is relatively even.
- Most visitors to Milford Sound are in New Zealand for a holiday.
- Around 60% of visitors to Milford Sound stay overnight in the local area (Milford Sound/Te Anau/Manapouri) while the rest day trip from surrounding areas, mainly Queenstown.
- Most visitors to Milford Sound are travelling independently when they are in New Zealand, rather than as part of an organised tour or group.
- Christchurch and Queenstown airports are the most common international entry points for Milford Sound visitors.
- Visitors to Milford Sound spend most of their nights in New Zealand in Queenstown, Wanaka and other destinations in the South Island.
- Visitors to Milford Sound each spend an average of 1.5 nights in the local area (Milford Sound/Te Anau/Manapouri) and a further 0.5 nights elsewhere in Southland.



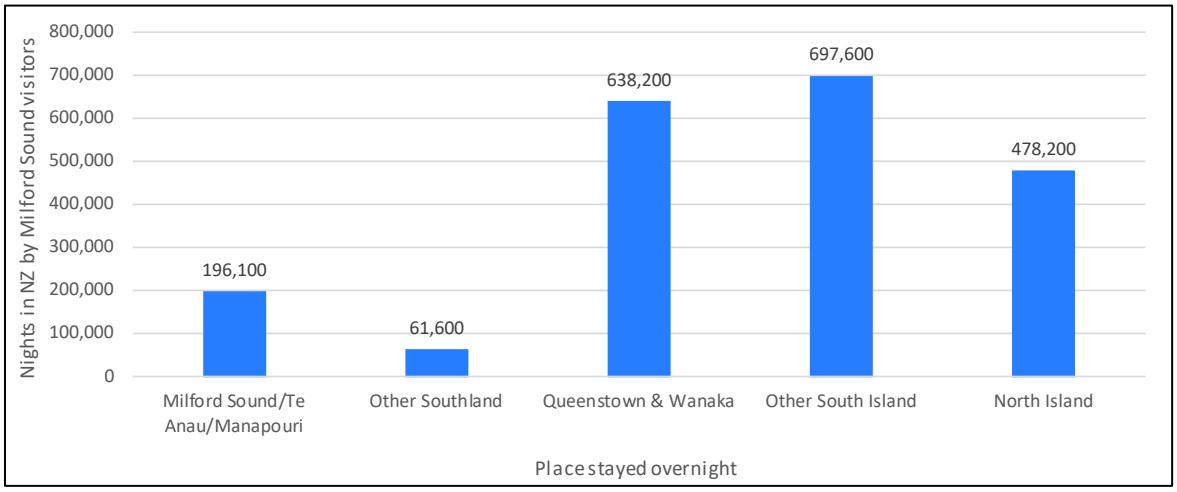
Annual average visitors to Milford Sound by age and gender 2014-19



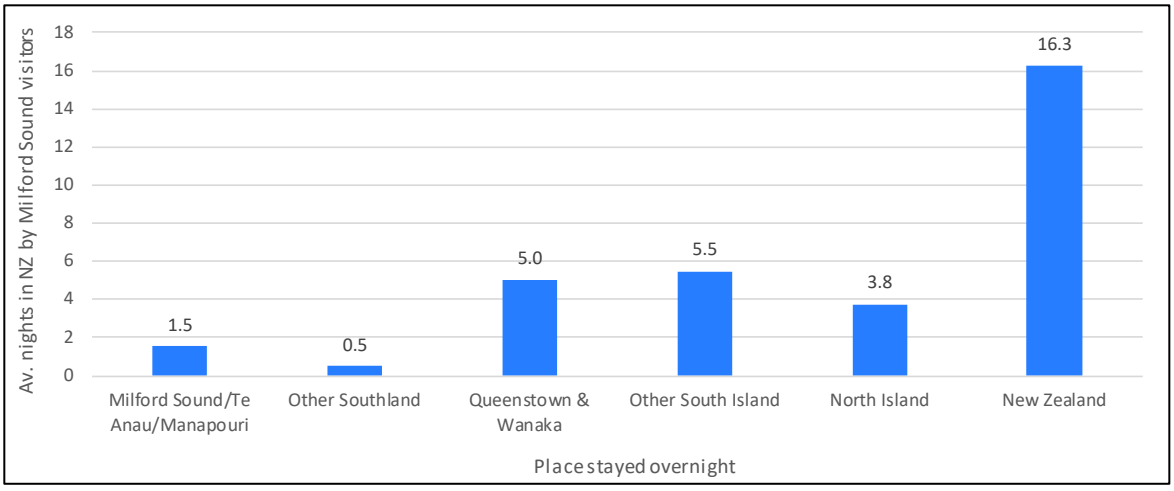
Annual average visitors to Milford Sound by travel purpose and visitor type 2014-19



Annual average visitors to Milford Sound by travel style and international port of entry 2014-19



Average annual nights spent in New Zealand by international visitors who visit Milford Sound 2014-19

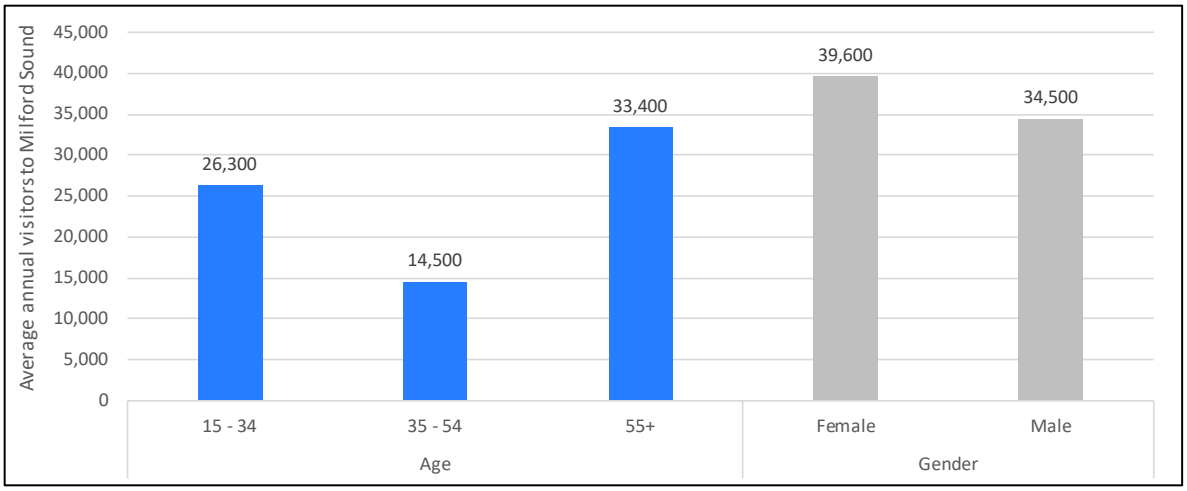


Average nights spent in New Zealand by international visitors who visit Milford Sound 2014-19

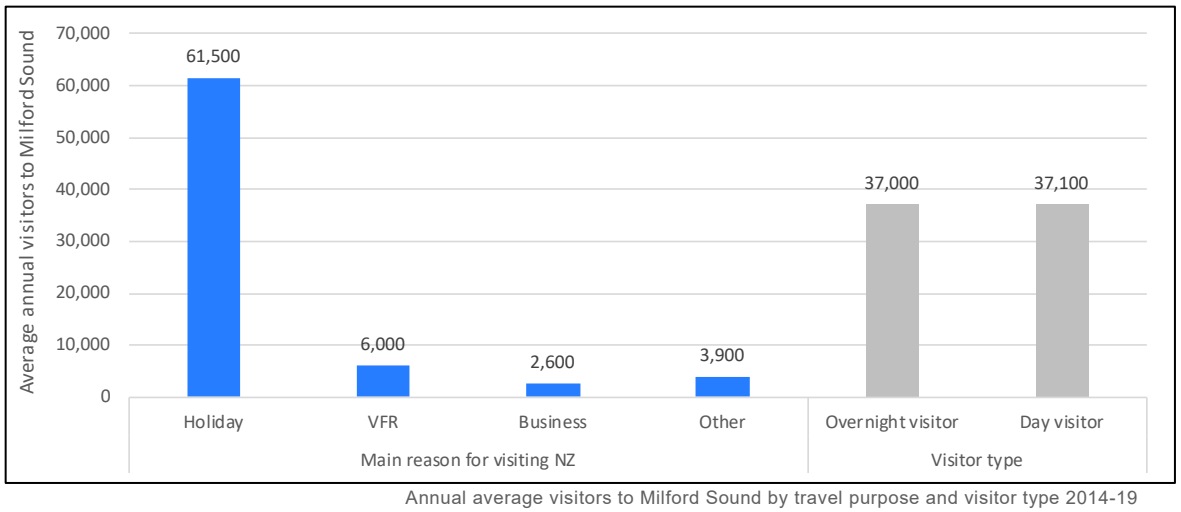
UNITED STATES

Key insights:

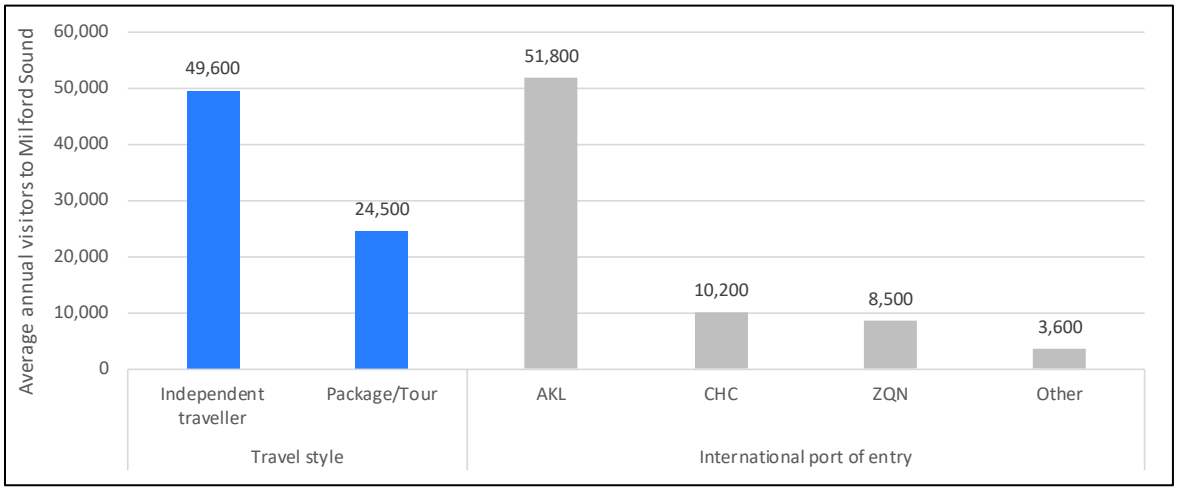
- The largest age cohort is 55+ years, and the gender split is slightly skewed towards females.
- Most visitors to Milford Sound are in New Zealand for a holiday.
- Half of visitors to Milford Sound stay overnight in the local area (Milford Sound/Te Anau/Manapouri) while the rest day trip from surrounding areas, mainly Queenstown.
- Most visitors to Milford Sound are travelling independently when they are in New Zealand, rather than as part of an organised tour or group.
- Auckland Airport is the most common international entry point for Milford Sound visitors.
- Visitors to Milford Sound spend just over half of their nights in New Zealand in the South Island.
- Visitors to Milford Sound each spend an average of 1.3 nights in the local area (Milford Sound/Te Anau/Manapouri) and a further 0.3 nights elsewhere in Southland.



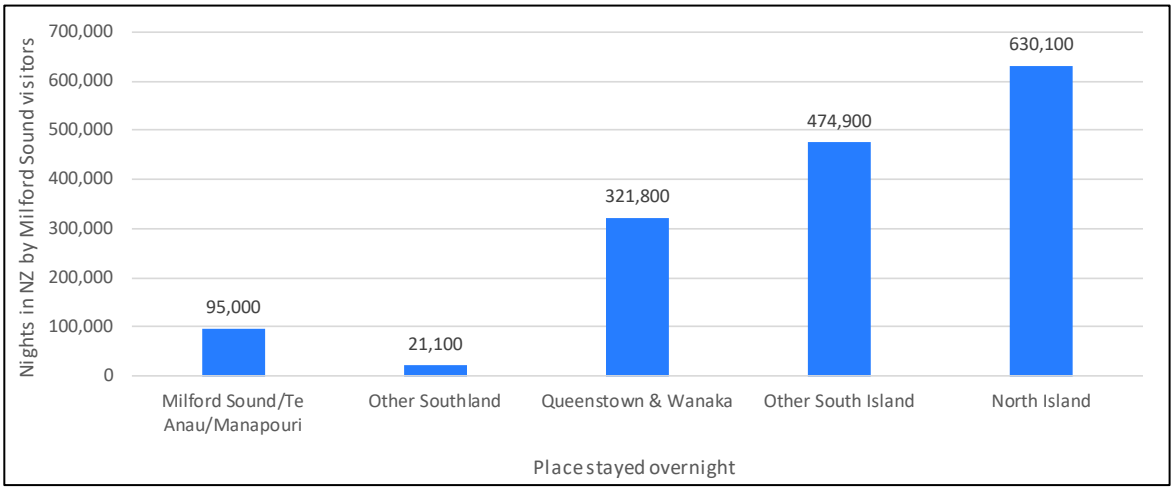
Annual average visitors to Milford Sound by age and gender 2014-19



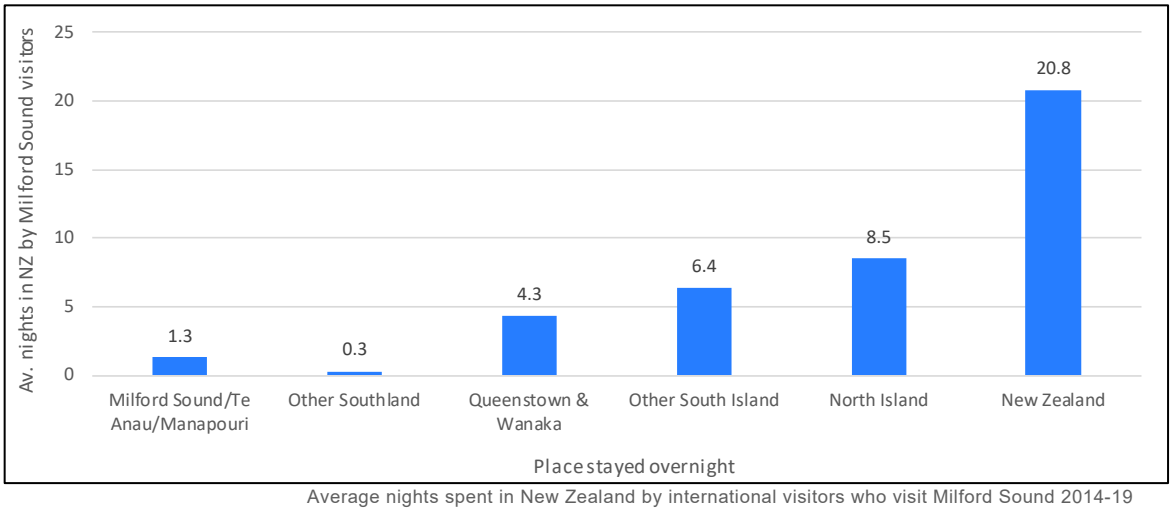
Annual average visitors to Milford Sound by travel purpose and visitor type 2014-19



Annual average visitors to Milford Sound by travel style and international port of entry 2014-19



Average annual nights spent in New Zealand by international visitors who visit Milford Sound 2014-19

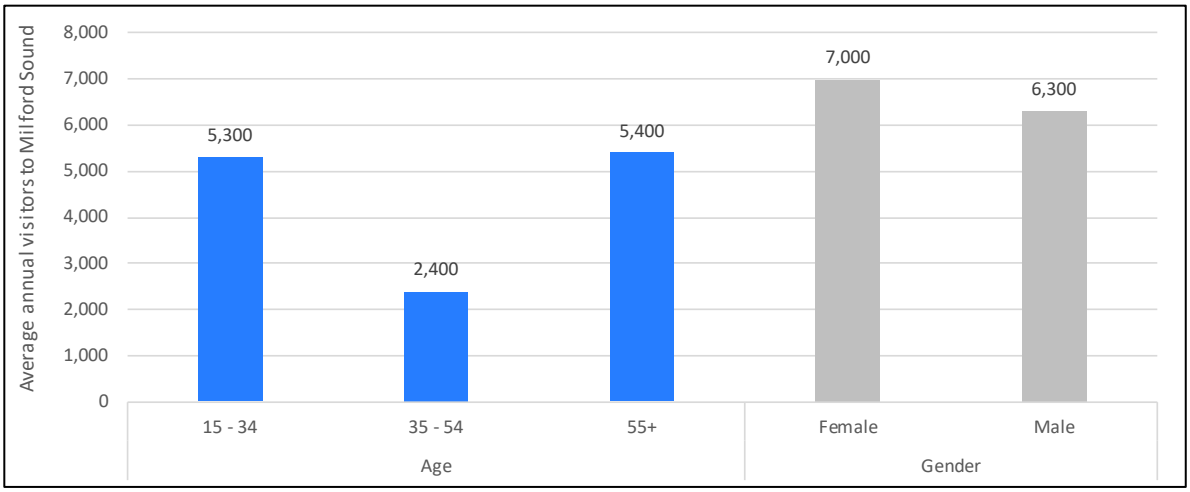


Average nights spent in New Zealand by international visitors who visit Milford Sound 2014-19

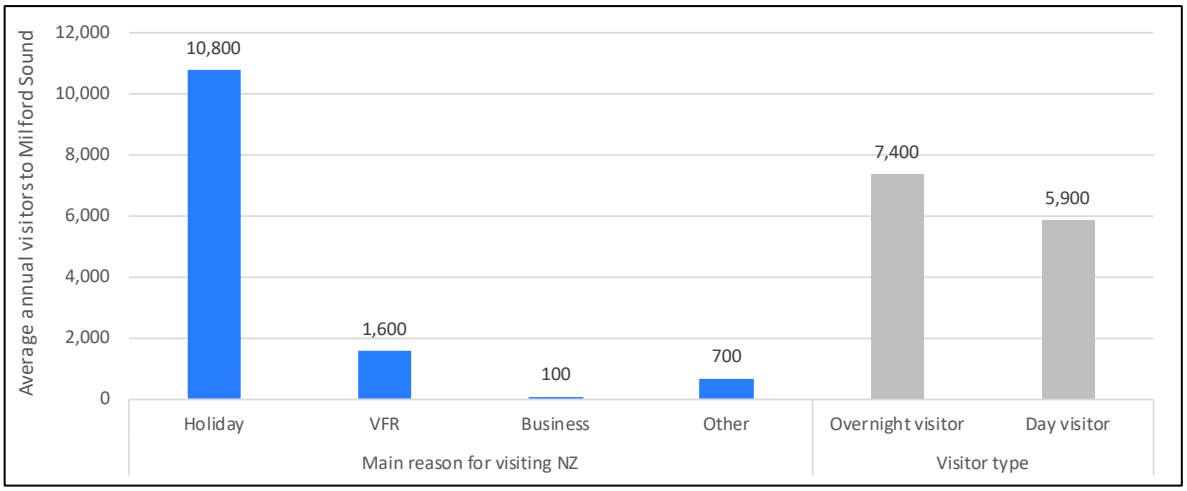
CANADA

Key insights:

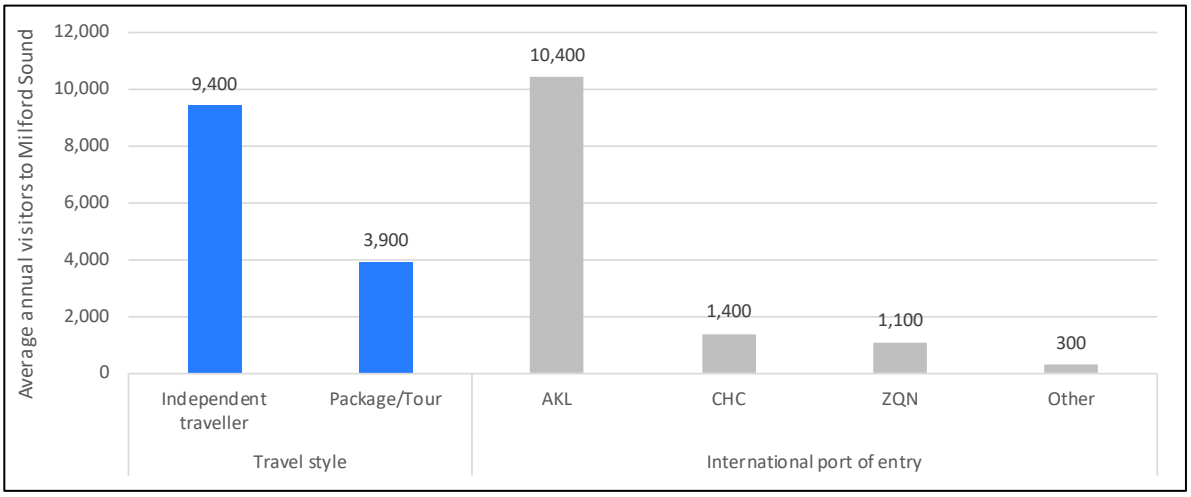
- The largest age cohorts are 15-34 years and 55+ years, and the gender split is slightly skewed towards females.
- Most visitors to Milford Sound are in New Zealand for a holiday.
- A small majority of visitors to Milford Sound stay overnight in the area (Milford Sound/Te Anau/Manapouri) while the rest day trip from surrounding areas – mainly Queenstown.
- Most visitors to Milford Sound are travelling independently when they are in New Zealand, rather than as part of an organised tour or group.
- Auckland Airport is the most common international entry point for Milford Sound visitors.
- Visitors to Milford Sound spend around half of their nights in New Zealand in the South Island.
- Visitors to Milford Sound each spend an average of 1.5 nights in the area (Milford Sound/Te Anau/Manapouri) and a further 0.5 nights elsewhere in Southland.



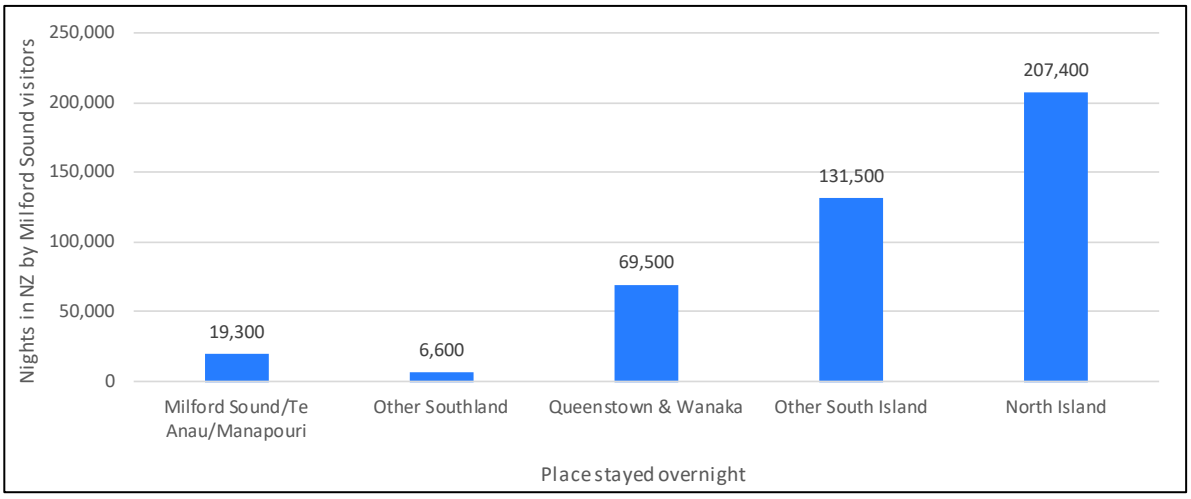
Annual average visitors to Milford Sound by age and gender 2014-19



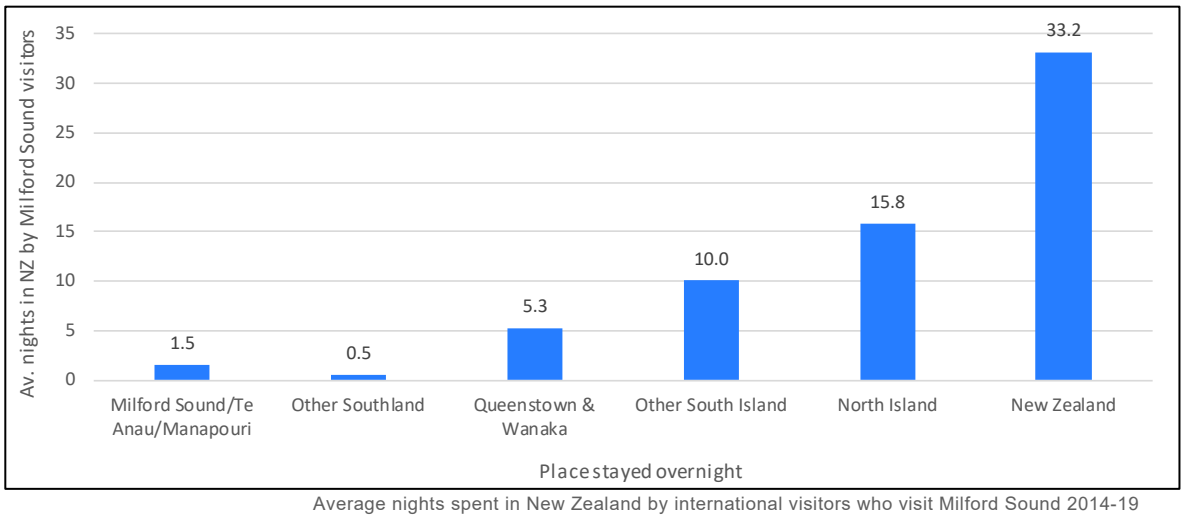
Annual average visitors to Milford Sound by travel purpose and visitor type 2014-19



Annual average visitors to Milford Sound by travel style and international port of entry 2014-19



Average annual nights spent in New Zealand by international visitors who visit Milford Sound 2014-19

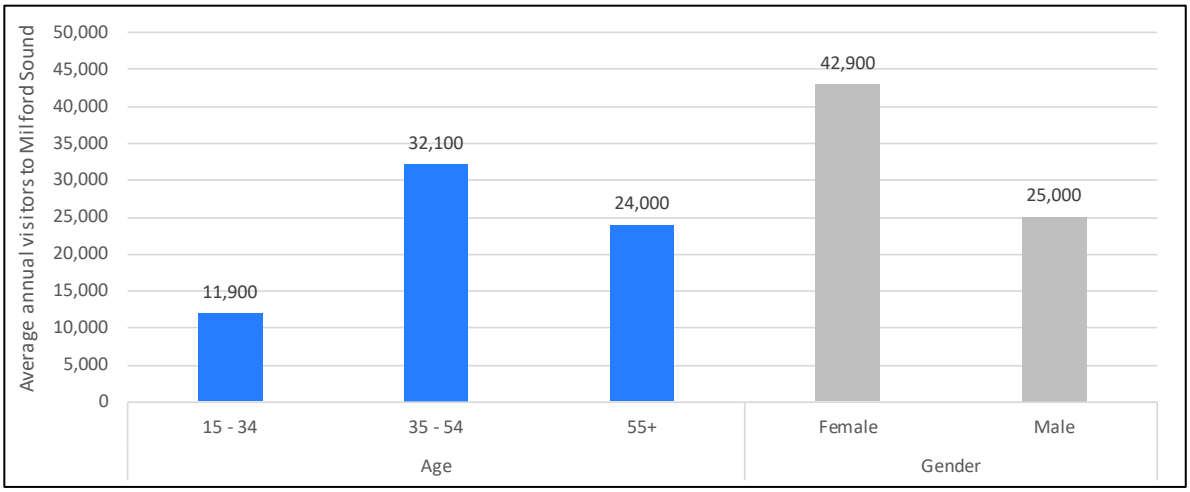


Average nights spent in New Zealand by international visitors who visit Milford Sound 2014-19

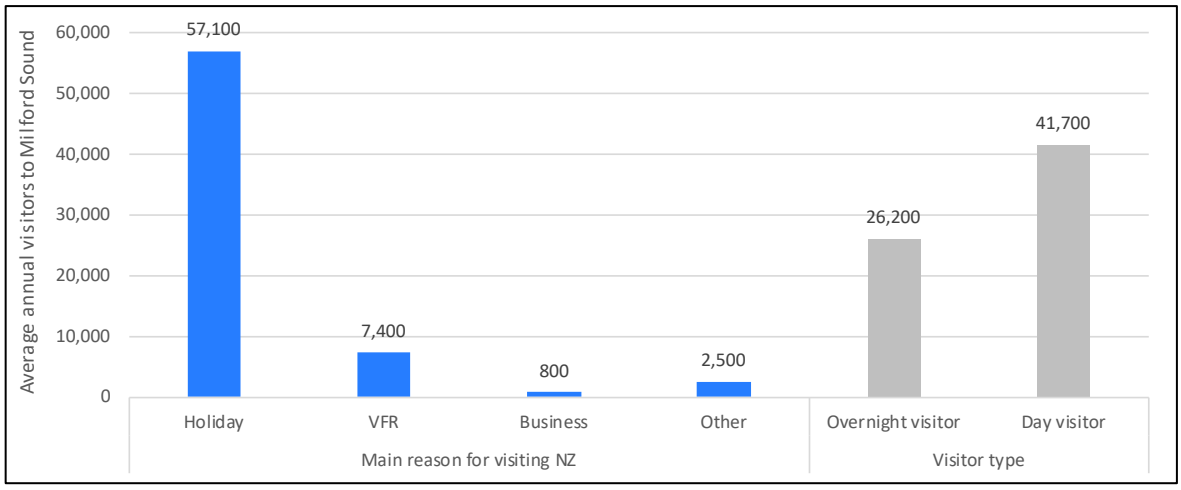
CHINA

Key insights:

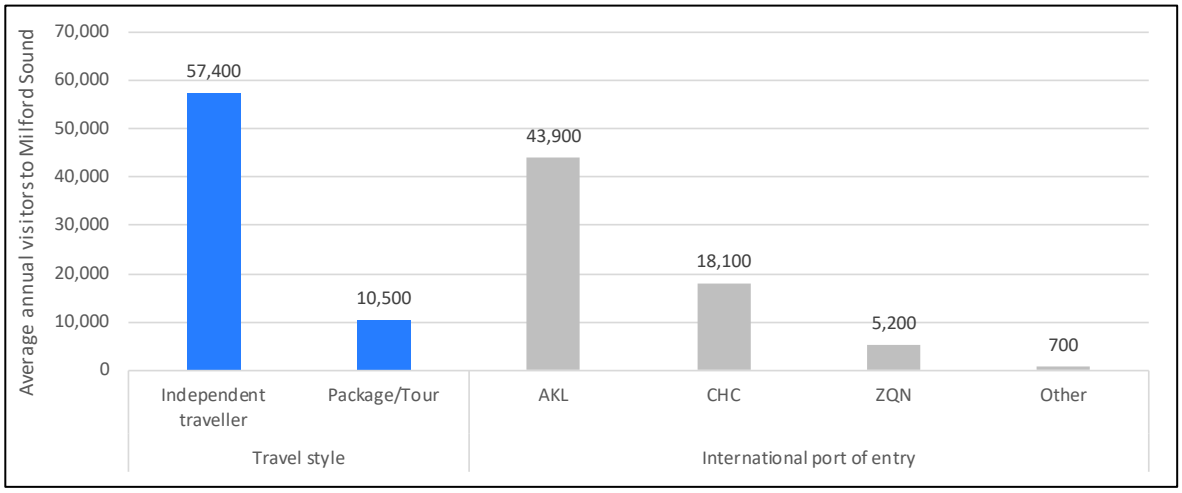
- The largest age cohort is 35-54 years, and the gender split is strongly skewed towards females.
- Most visitors to Milford Sound are in New Zealand for a holiday.
- Around 40% of visitors to Milford Sound stay overnight in the local area (Milford Sound/Te Anau/Manapouri) while the rest day trip from surrounding areas, mainly Queenstown.
- Most visitors to Milford Sound are travelling independently when they are in New Zealand, rather than as part of an organised tour or group.
- Auckland Airport is the most common international entry point for Milford Sound visitors.
- Visitors to Milford Sound spend around half of their nights in New Zealand in the South Island.
- Visitors to Milford Sound each spend an average of 0.8 nights in the local area (Milford Sound/Te Anau/Manapouri) and a further 0.1 nights elsewhere in Southland.



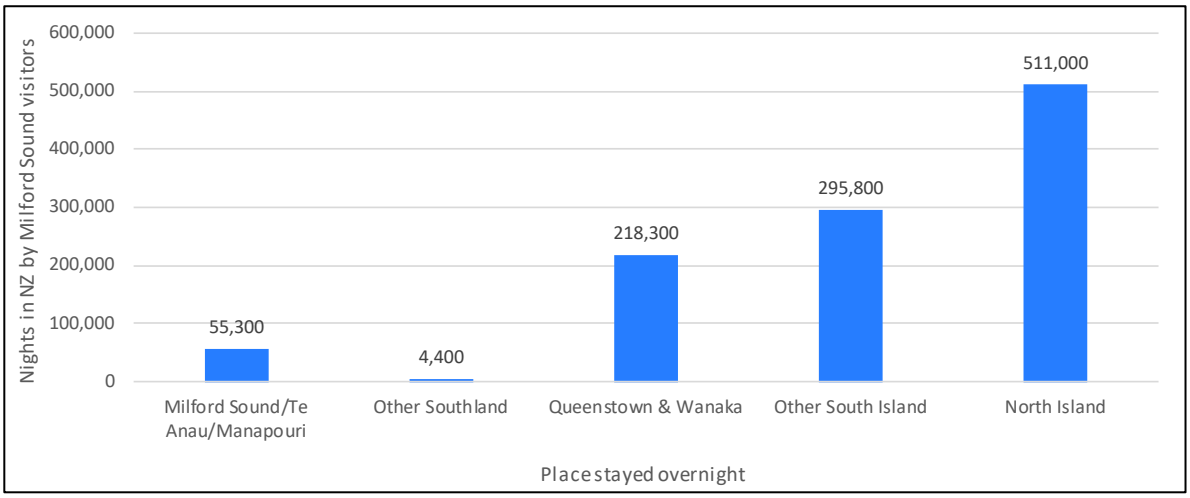
Annual average visitors to Milford Sound by age and gender 2014-19



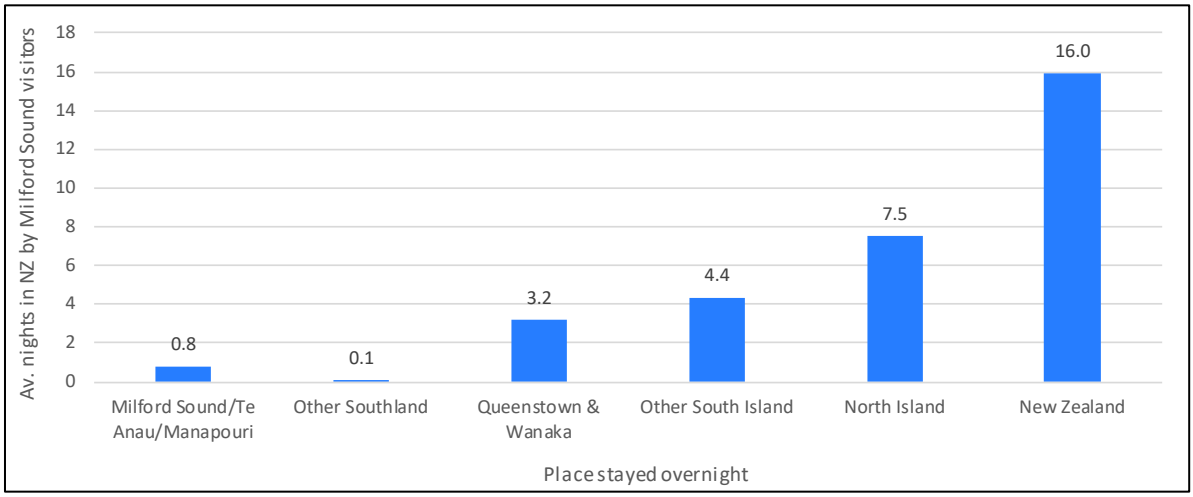
Annual average visitors to Milford Sound by travel purpose and visitor type 2014-19



Annual average visitors to Milford Sound by travel style and international port of entry 2014-19



Average annual nights spent in New Zealand by international visitors who visit Milford Sound 2014-19

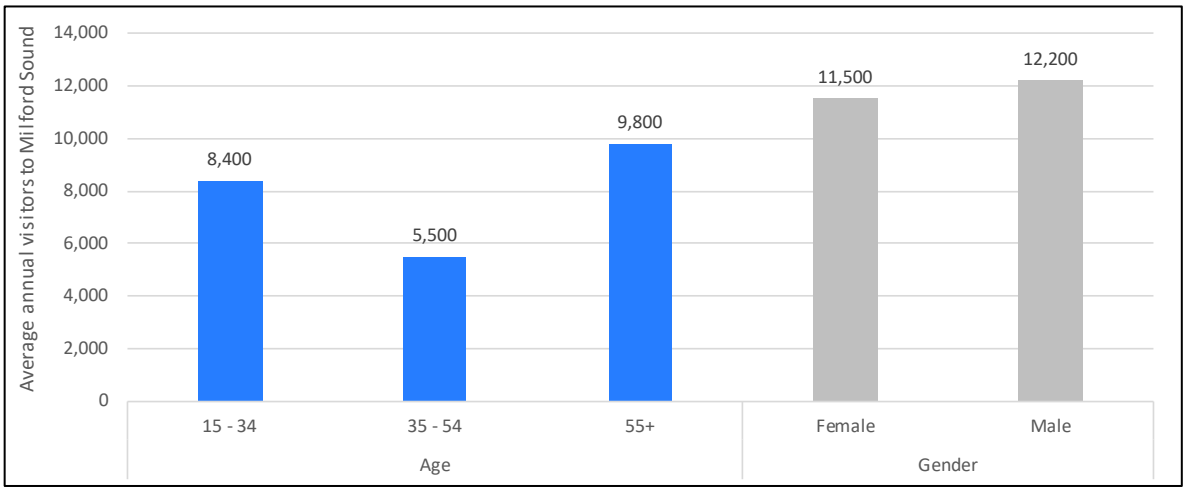


Average nights spent in New Zealand by international visitors who visit Milford Sound 2014-19

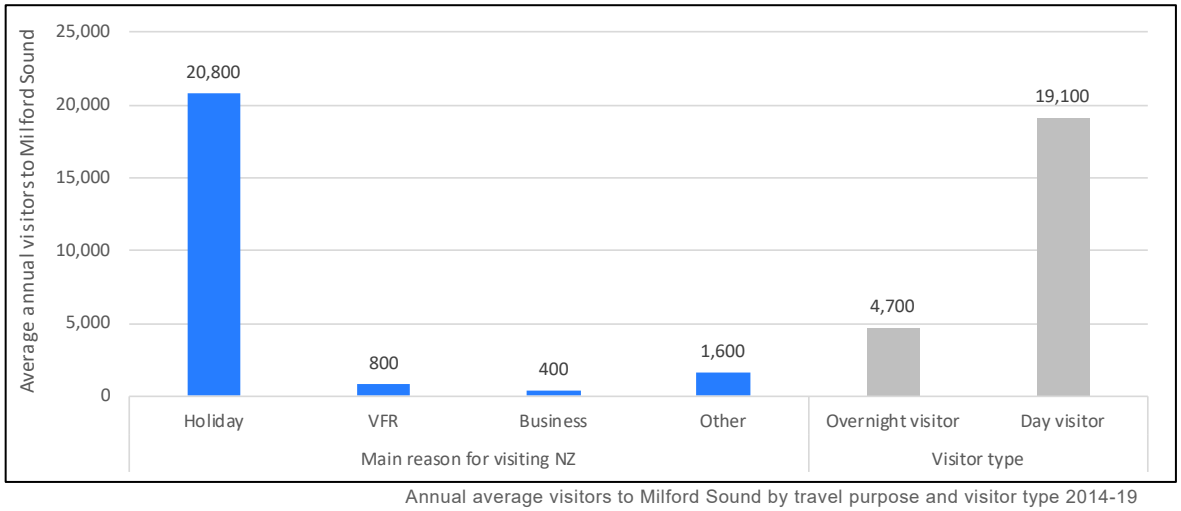
JAPAN

Key insights:

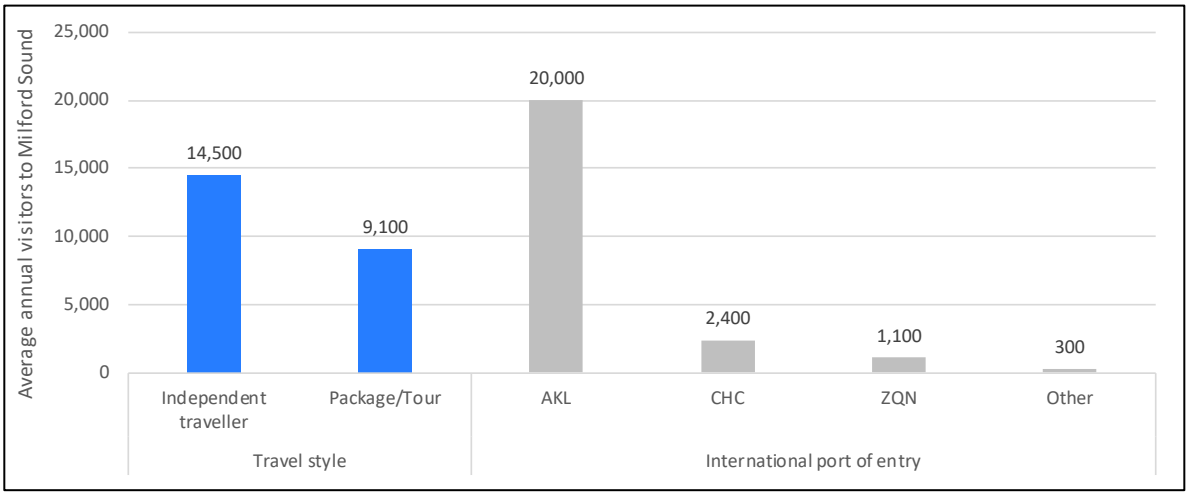
- The largest age cohort is 54+ years, and the gender split is relatively even.
- Most visitors to Milford Sound are in New Zealand for a holiday.
- Only 20% of visitors to Milford Sound stay overnight in the local area (Milford Sound/Te Anau/Manapouri) while the rest day trip from surrounding areas, mainly Queenstown.
- More than half of visitors to Milford Sound are travelling independently when they are in New Zealand, but a high share travel as part of an organised tour or group.
- Auckland Airport is the most common international entry point for Milford Sound visitors.
- Visitors to Milford Sound spend slightly more nights in the South Island than in the North Island.
- Visitors to Milford Sound each spend an average of 0.7 nights in the local area (Milford Sound/Te Anau/Manapouri) and a further 0.1 nights elsewhere in Southland.



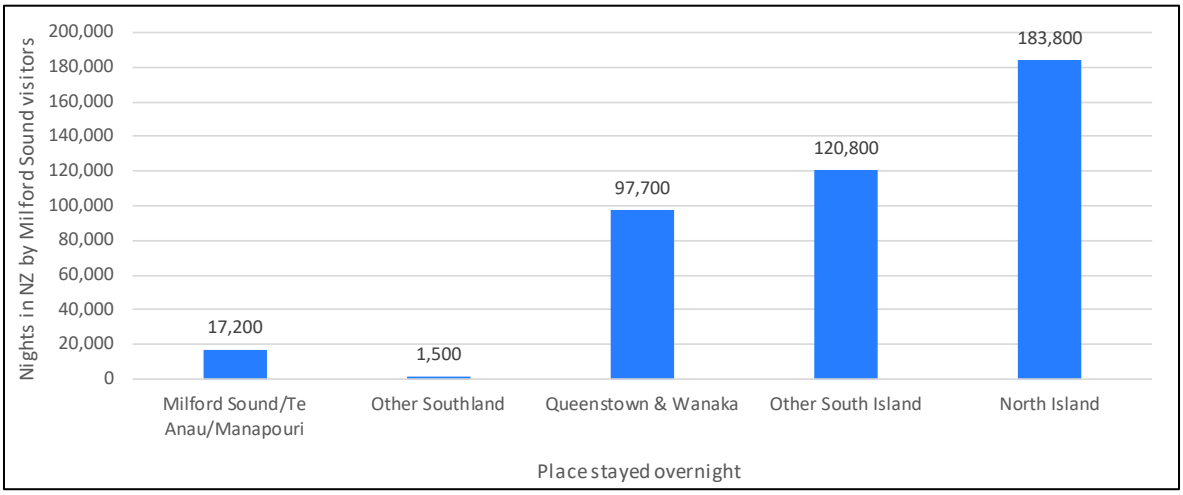
Annual average visitors to Milford Sound by age and gender 2014-19



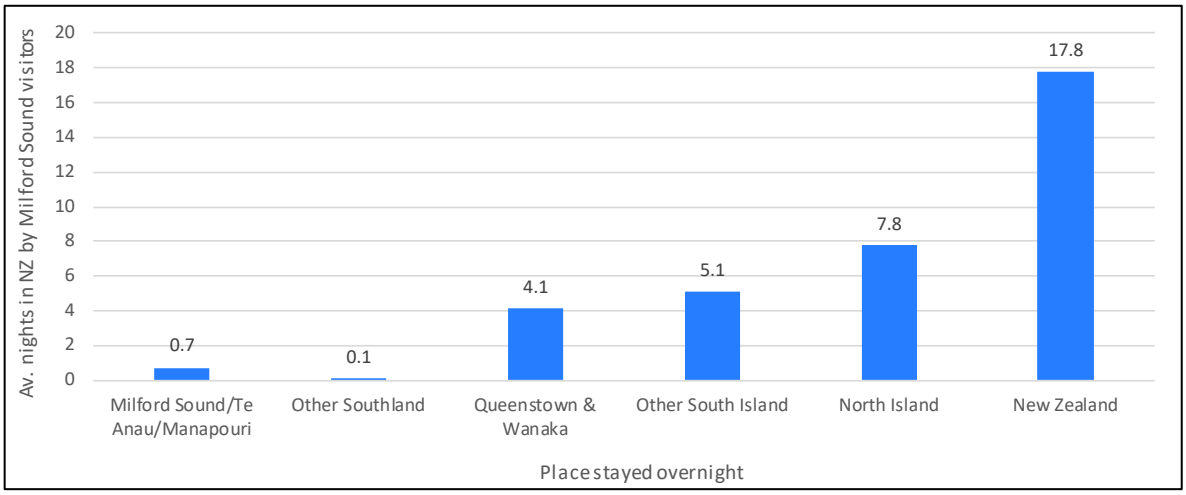
Annual average visitors to Milford Sound by travel purpose and visitor type 2014-19



Annual average visitors to Milford Sound by travel style and international port of entry 2014-19



Average annual nights spent in New Zealand by international visitors who visit Milford Sound 2014-19

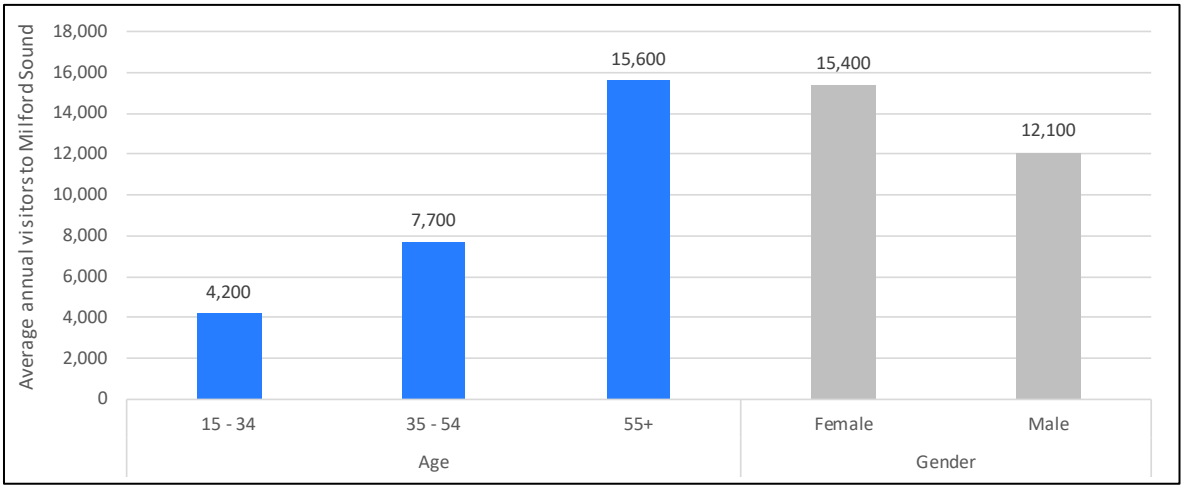


Average nights spent in New Zealand by international visitors who visit Milford Sound 2014-19

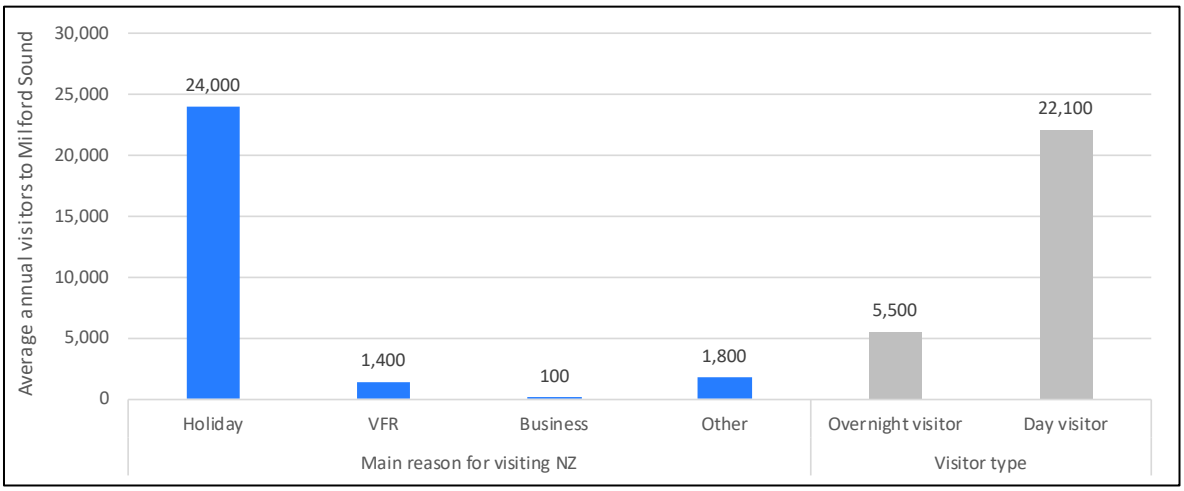
SOUTH KOREA

Key insights:

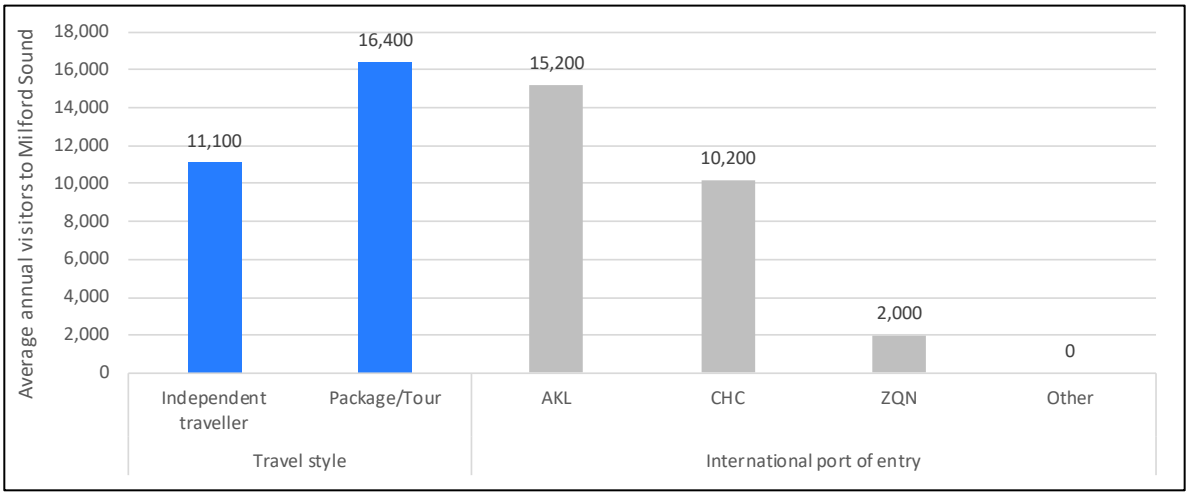
- The largest age cohort is 55+ years, and the gender split is slightly skewed towards females.
- Most visitors to Milford Sound are in New Zealand for a holiday.
- Less than 20% of visitors to Milford Sound stay overnight in the local area (Milford Sound/Te Anau/Manapouri) while the rest day trip from surrounding areas, mainly Queenstown.
- Most visitors to Milford Sound are travelling as part of an organised tour or group when they are in New Zealand.
- Auckland Airport is the most common international entry point for Milford Sound visitors.
- Visitors to Milford Sound spend around half of their nights in New Zealand in the South Island.
- Visitors to Milford Sound each spend an average of 0.3 nights in the local area (Milford Sound/Te Anau/Manapouri) and a less than 0.1 nights elsewhere in Southland.



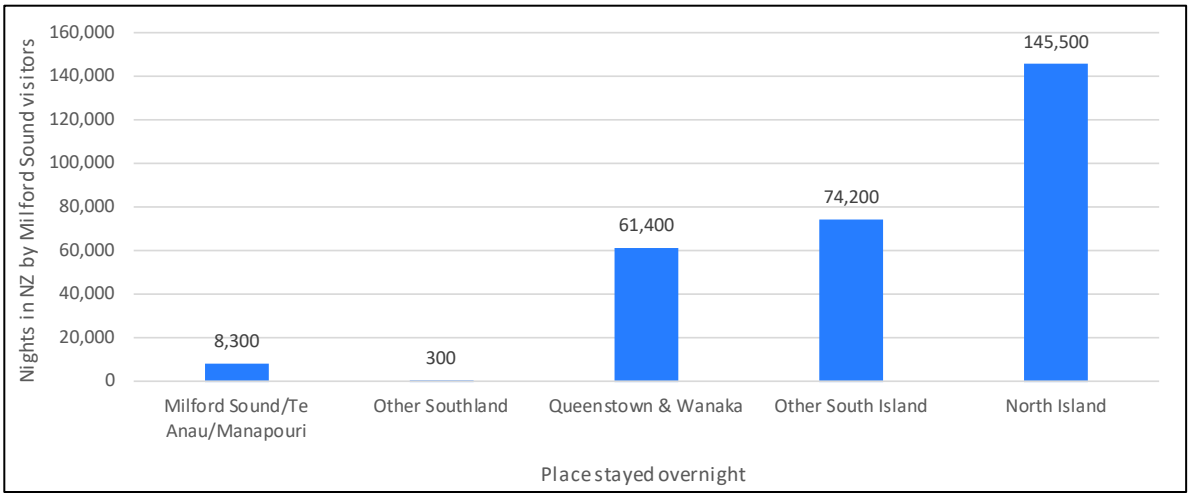
Annual average visitors to Milford Sound by age and gender 2014-19



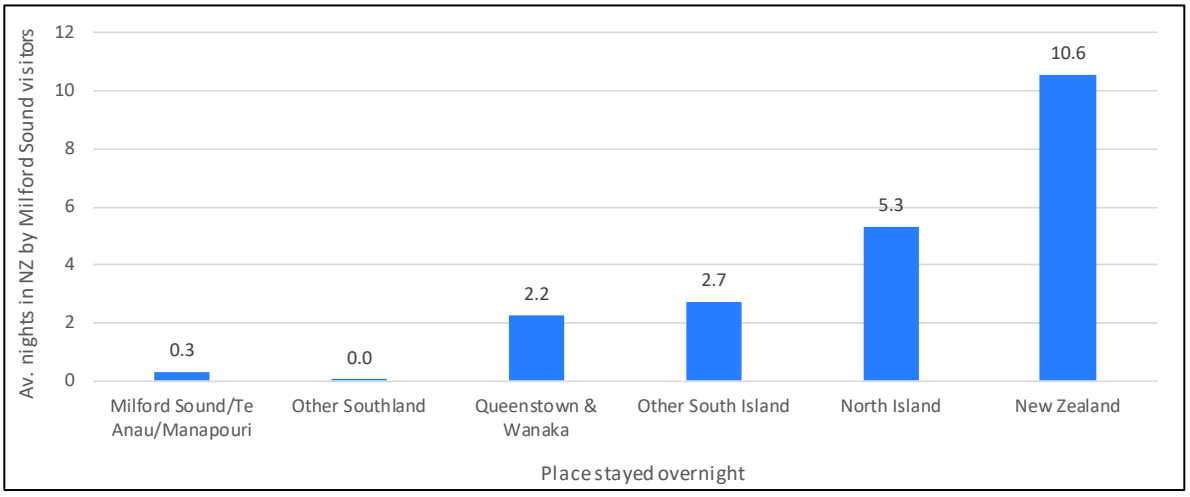
Annual average visitors to Milford Sound by travel purpose and visitor type 2014-19



Annual average visitors to Milford Sound by travel style and international port of entry 2014-19



Average annual nights spent in New Zealand by international visitors who visit Milford Sound 2014-19

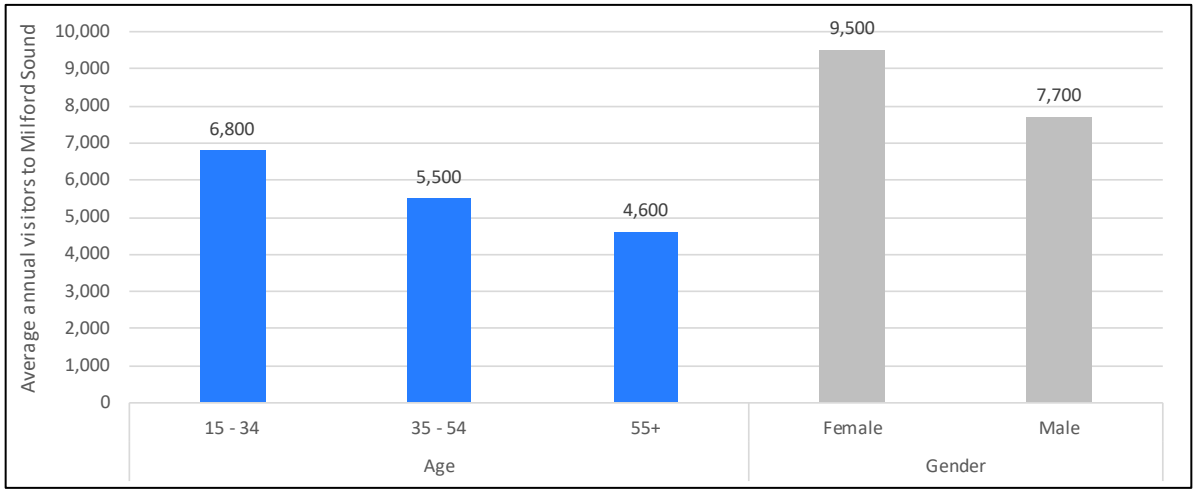


Average nights spent in New Zealand by international visitors who visit Milford Sound 2014-19

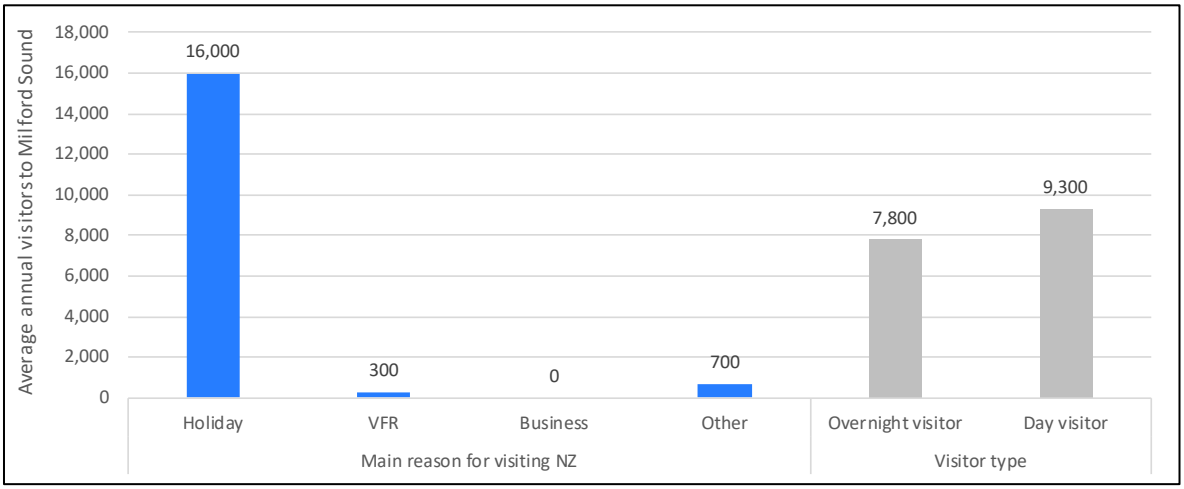
SINGAPORE

Key insights:

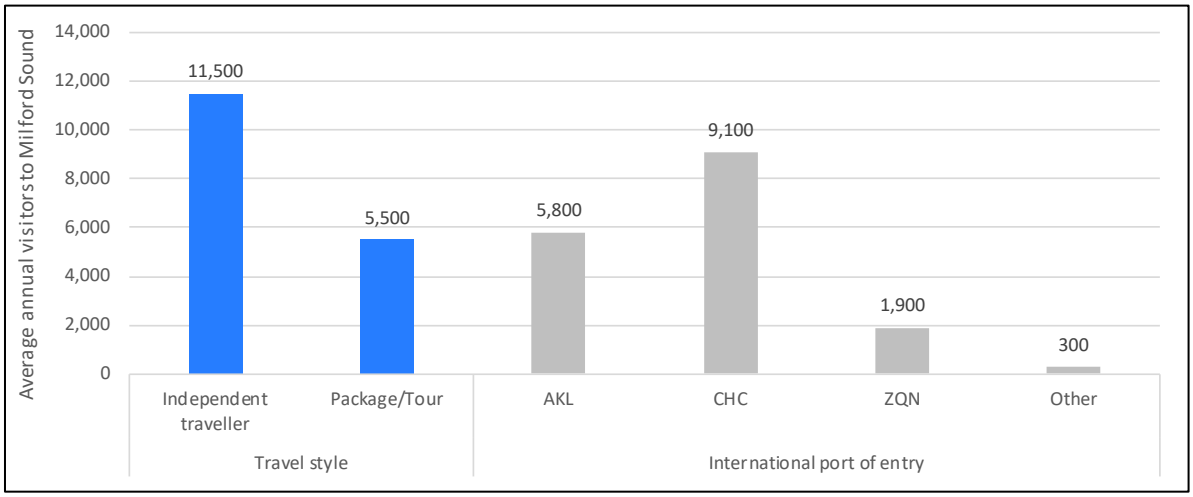
- The largest age cohort is 15-34 years, and the gender split is slightly skewed towards females.
- Most visitors to Milford Sound are in New Zealand for a holiday.
- Around 40% of visitors to Milford Sound stay overnight in the local area (Milford Sound/Te Anau/Manapouri) while the rest day trip from surrounding areas, mainly Queenstown.
- Most visitors to Milford Sound are travelling independently when they are in New Zealand, rather than as part of an organised tour or group.
- Christchurch Airport is the most common international entry point for Milford Sound visitors.
- Visitors to Milford Sound spend around 60% of their nights in New Zealand in the South Island.
- Visitors to Milford Sound each spend an average of 0.9 nights in the local area (Milford Sound/Te Anau/Manapouri) and a further 0.3 nights elsewhere in Southland.



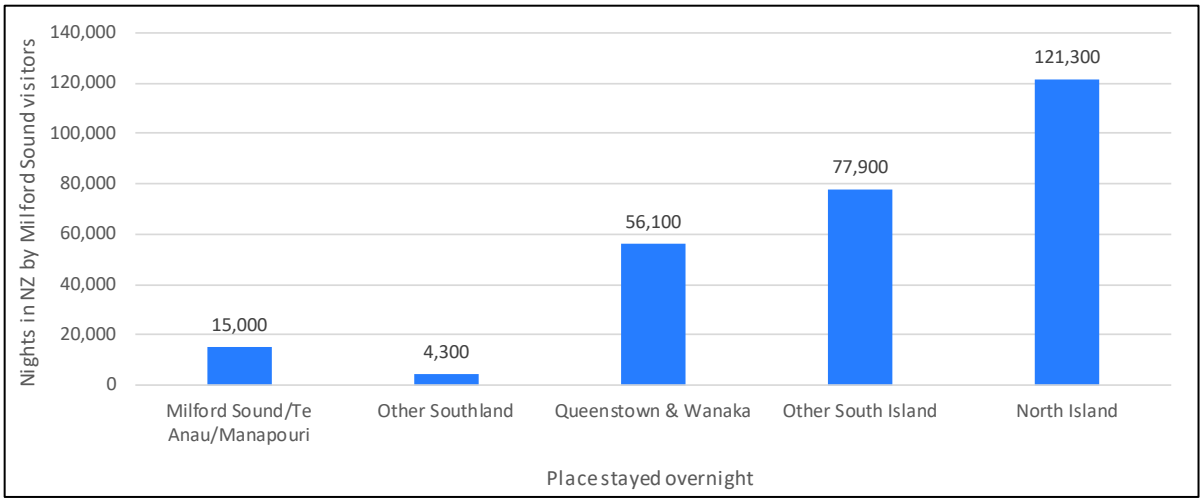
Annual average visitors to Milford Sound by age and gender 2014-19



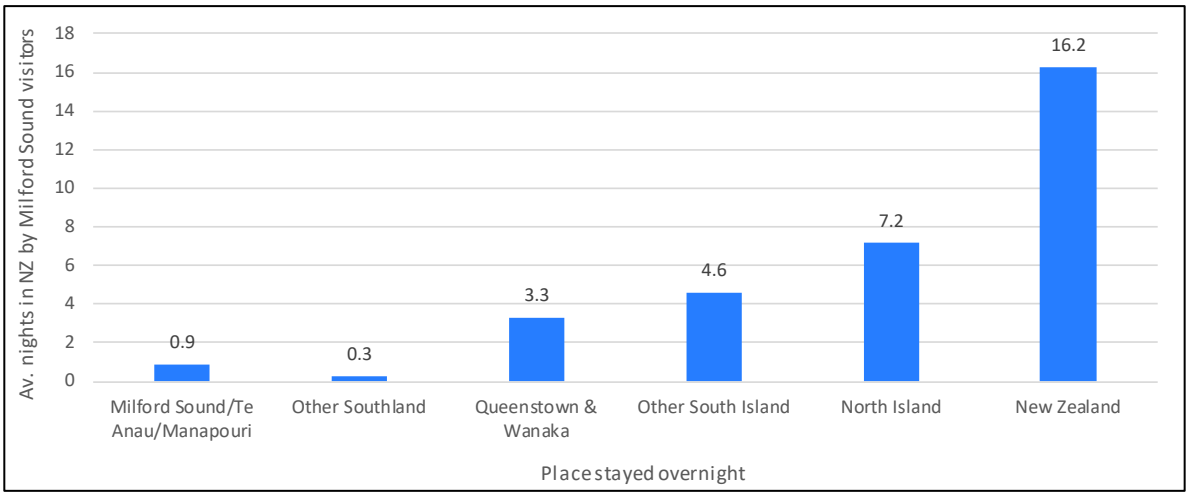
Annual average visitors to Milford Sound by travel purpose and visitor type 2014-19



Annual average visitors to Milford Sound by travel style and international port of entry 2014-19



Average annual nights spent in New Zealand by international visitors who visit Milford Sound 2014-19

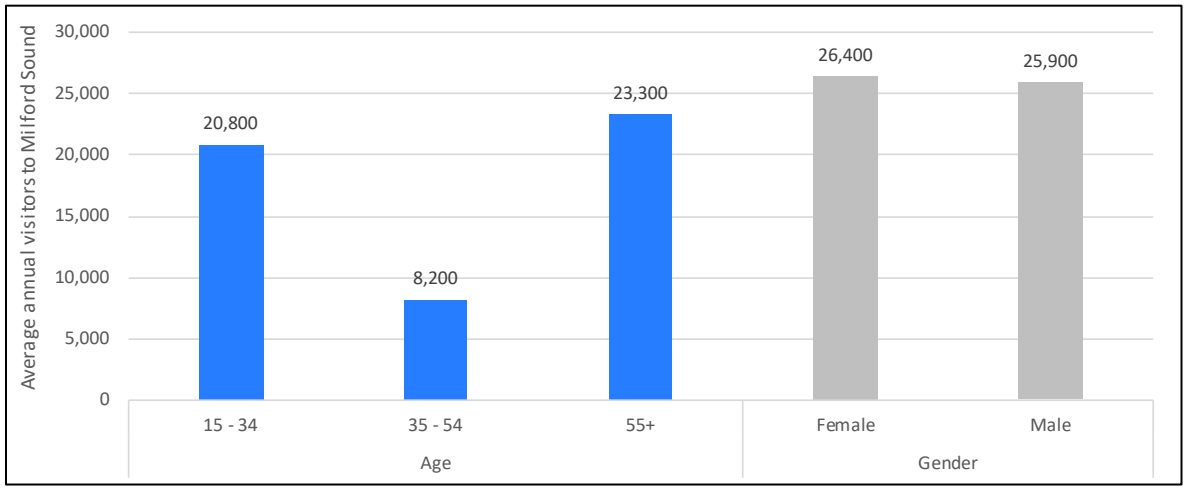


Average nights spent in New Zealand by international visitors who visit Milford Sound 2014-19

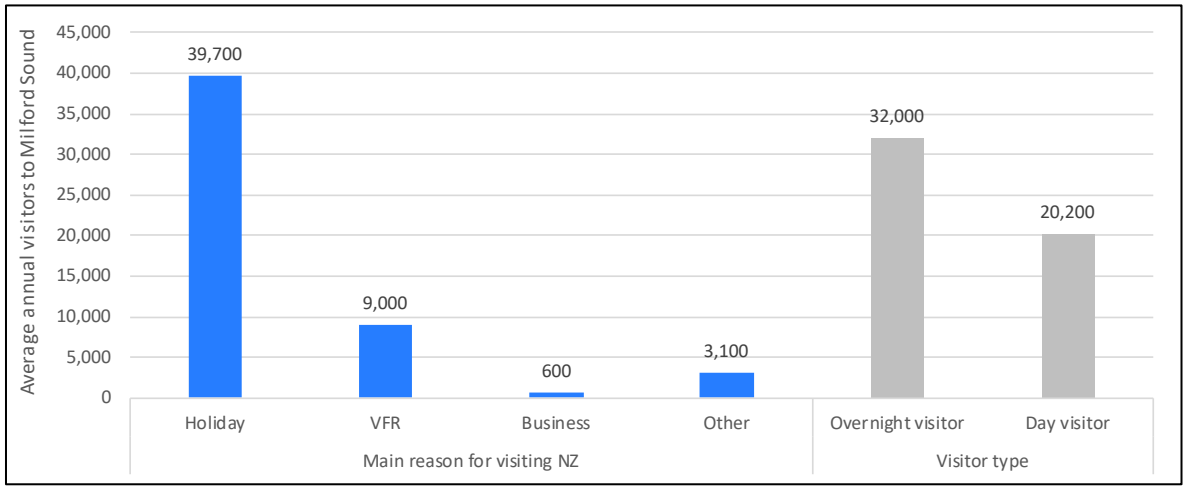
UNITED KINGDOM

Key insights:

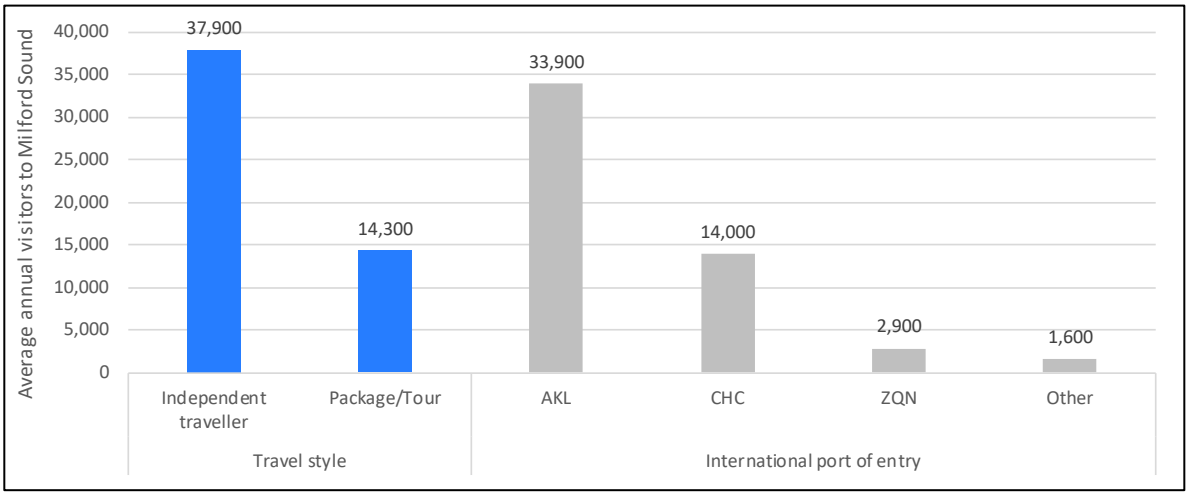
- The largest age cohorts are 15-34 years and 55+ years, and the gender split is relatively even.
- Most visitors to Milford Sound are in New Zealand for a holiday.
- Around 60% of visitors to Milford Sound stay overnight in the local area (Milford Sound/Te Anau/Manapouri) while the rest day trip from surrounding areas, mainly Queenstown.
- Most visitors to Milford Sound are travelling independently when they are in New Zealand, rather than as part of an organised tour or group.
- Auckland Airport is the most common international entry point for Milford Sound visitors.
- Visitors to Milford Sound spend around half of their nights in New Zealand in the South Island.
- Visitors to Milford Sound each spend an average of 1.7 nights in the local area (Milford Sound/Te Anau/Manapouri) and a further 0.9 nights elsewhere in Southland.



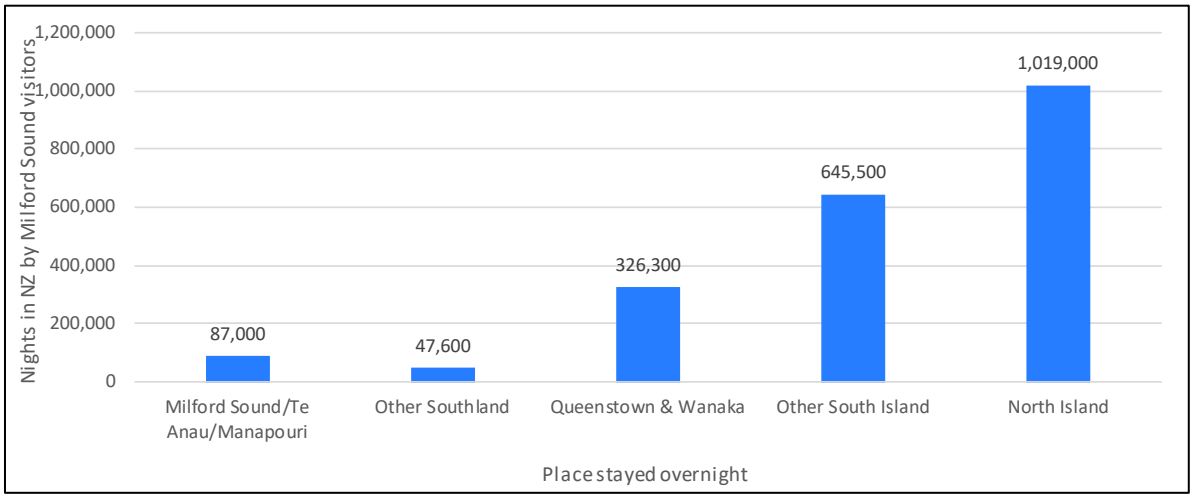
Annual average visitors to Milford Sound by age and gender 2014-19



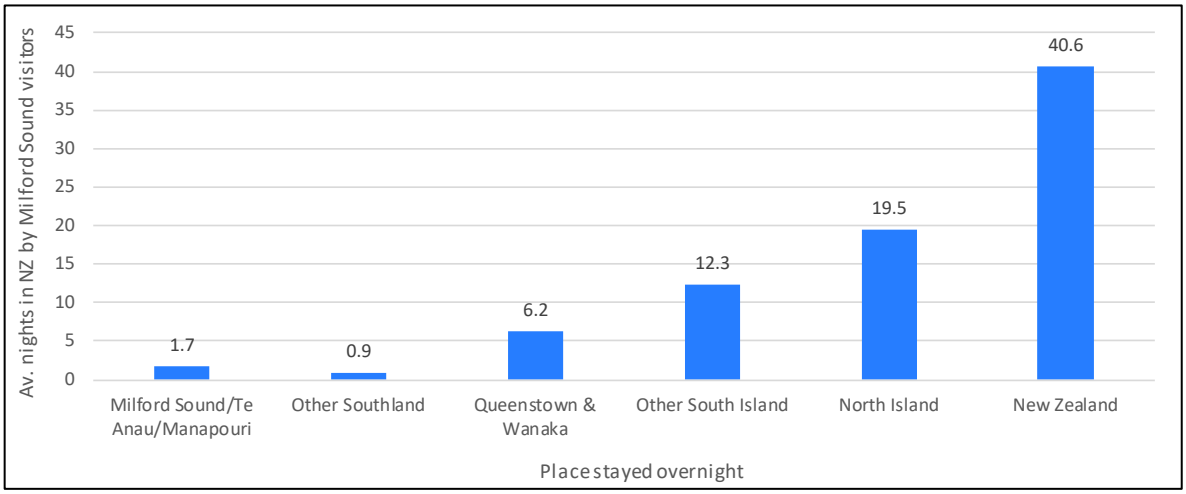
Annual average visitors to Milford Sound by travel purpose and visitor type 2014-19



Annual average visitors to Milford Sound by travel style and international port of entry 2014-19



Average annual nights spent in New Zealand by international visitors who visit Milford Sound 2014-19

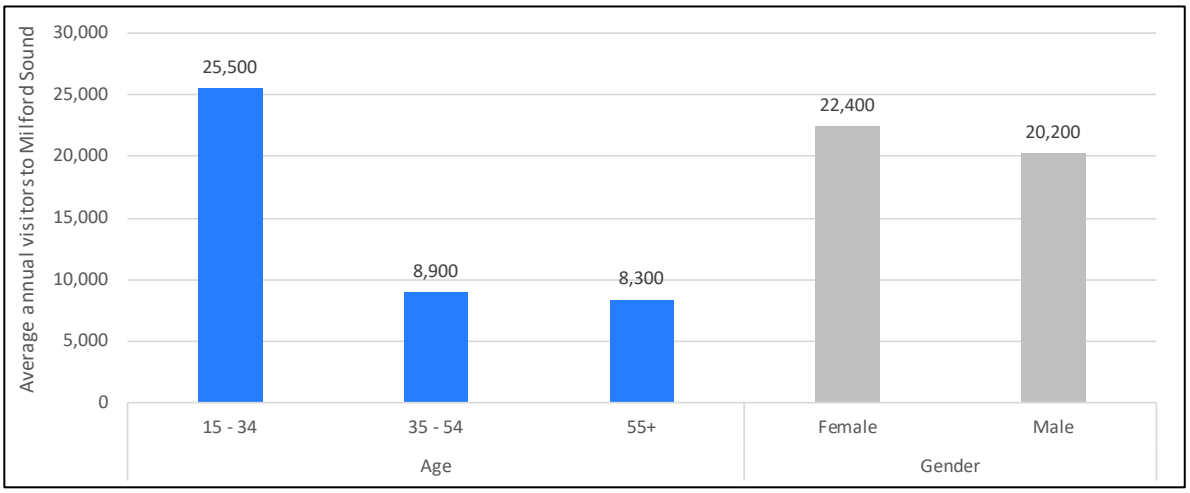


Average nights spent in New Zealand by international visitors who visit Milford Sound 2014-19

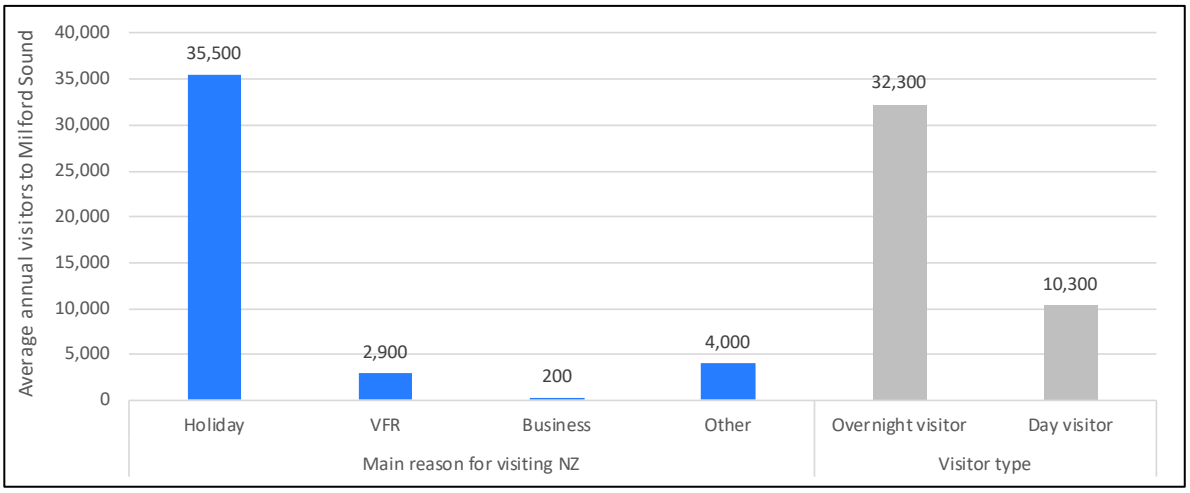
GERMANY

Key insights:

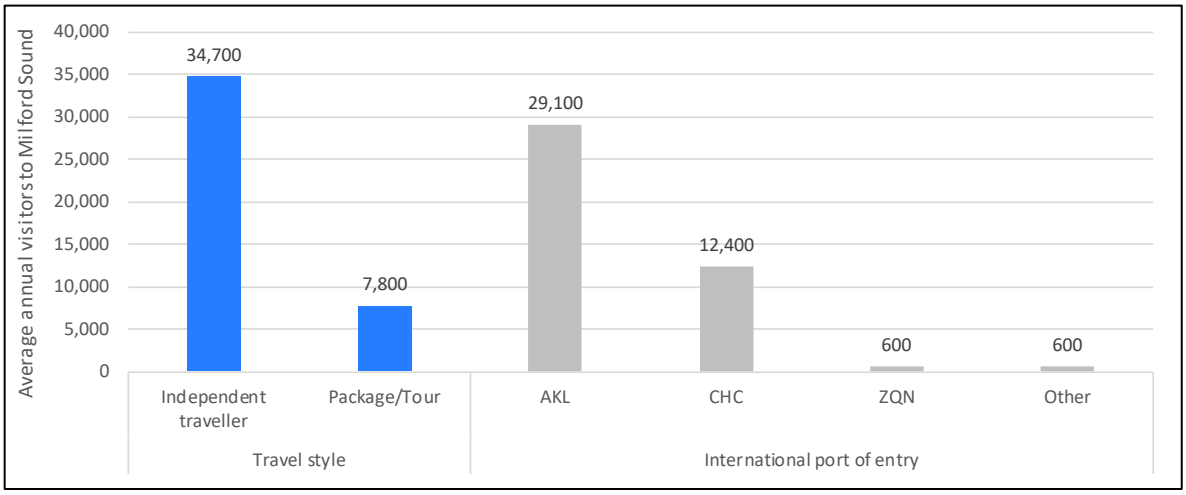
- The largest age cohort 15-34 years, and the gender split is relatively even.
- Most visitors to Milford Sound are in New Zealand for a holiday.
- Around 75% of visitors to Milford Sound stay overnight in the local area (Milford Sound/Te Anau/Manapouri) while the rest day trip from surrounding areas, mainly Queenstown.
- Most visitors to Milford Sound are travelling independently when they are in New Zealand, rather than as part of an organised tour or group.
- Auckland Airport is the most common international entry point for Milford Sound visitors.
- Visitors to Milford Sound spend around 60% of their nights in New Zealand in the North Island.
- Visitors to Milford Sound each spend an average of 2.6 nights in the local area (Milford Sound/Te Anau/Manapouri) and a further 0.9 nights elsewhere in Southland.



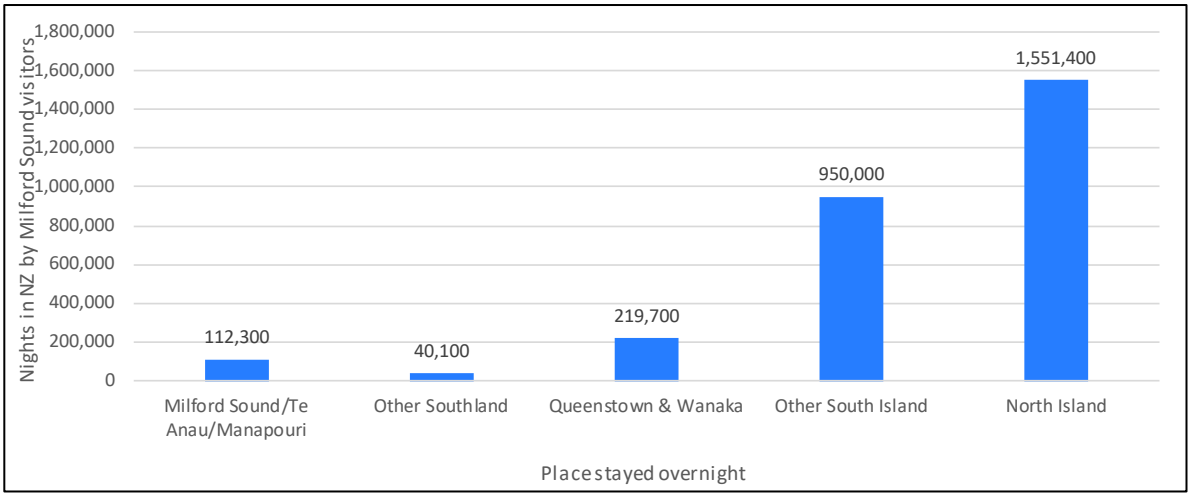
Annual average visitors to Milford Sound by age and gender 2014-19



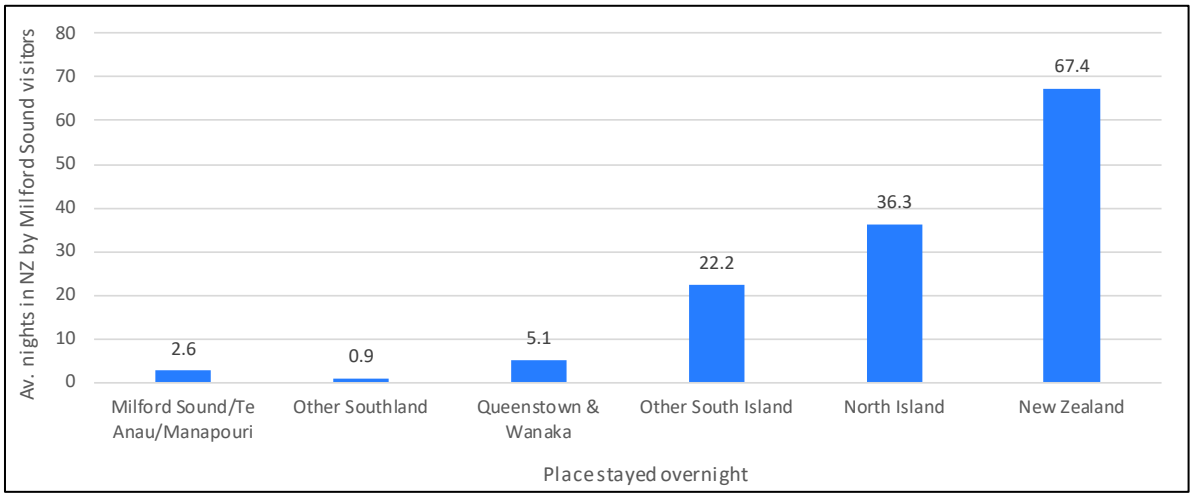
Annual average visitors to Milford Sound by travel purpose and visitor type 2014-19



Annual average visitors to Milford Sound by travel style and international port of entry 2014-19



Average annual nights spent in New Zealand by international visitors who visit Milford Sound 2014-19

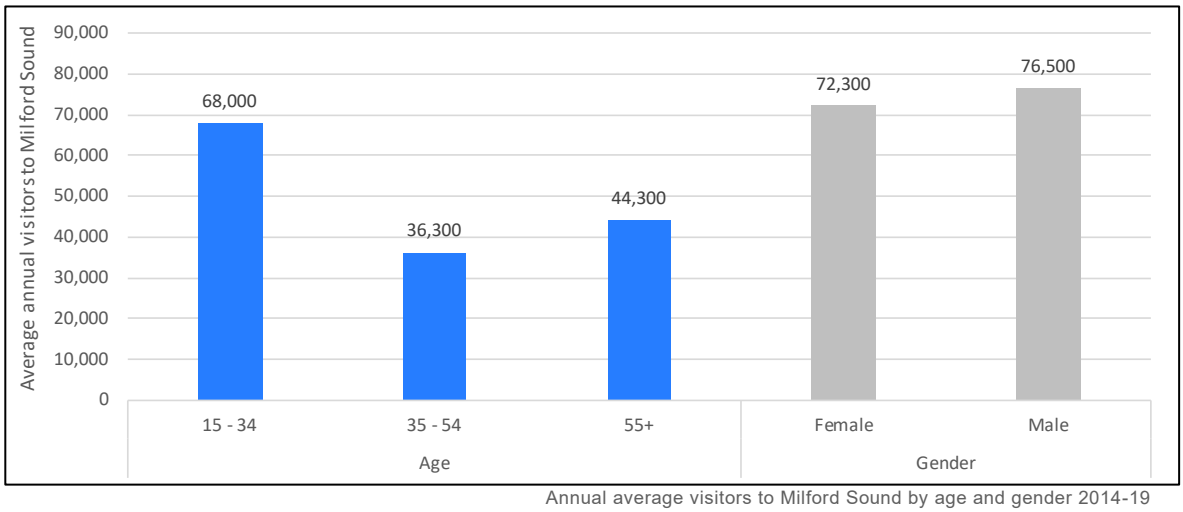


Average nights spent in New Zealand by international visitors who visit Milford Sound 2014-19

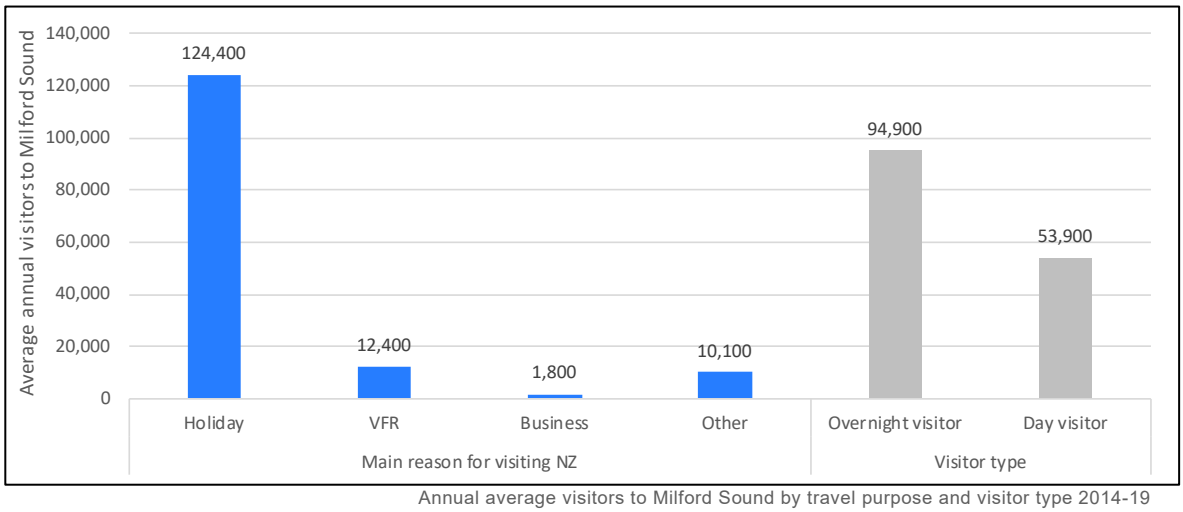
OTHER COUNTRIES

Key insights:

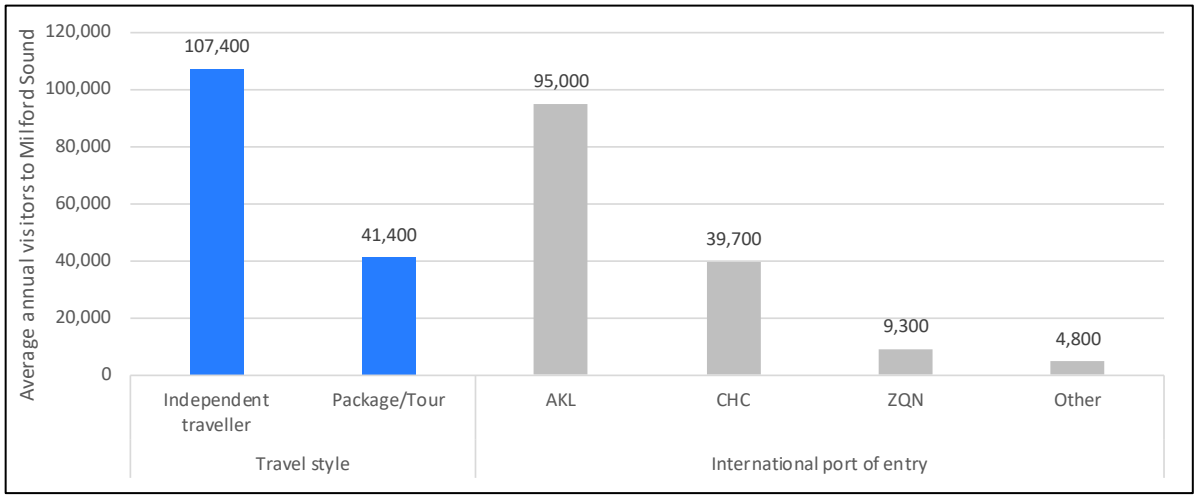
- The largest age cohort 15-34 years, and the gender split is relatively even.
- Most visitors to Milford Sound are in New Zealand for a holiday.
- Most visitors to Milford Sound stay overnight in the local area (Milford Sound/Te Anau/Manapouri) while the rest day trip from surrounding areas, mainly Queenstown.
- Most visitors to Milford Sound are travelling independently when they are in New Zealand, rather than as part of an organised tour or group.
- Auckland Airport is the most common international entry point for Milford Sound visitors.
- Visitors to Milford Sound spend just over half of their nights in New Zealand in the South Island.
- Visitors to Milford Sound each spend an average of 1.8 nights in the local area (Milford Sound/Te Anau/Manapouri) and a further 0.5 nights elsewhere in Southland.



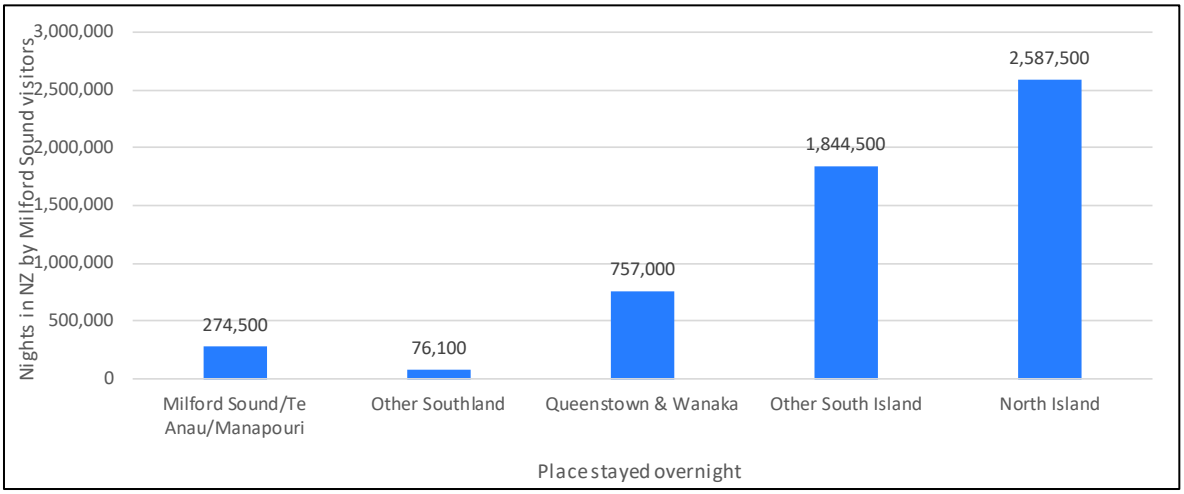
Annual average visitors to Milford Sound by age and gender 2014-19



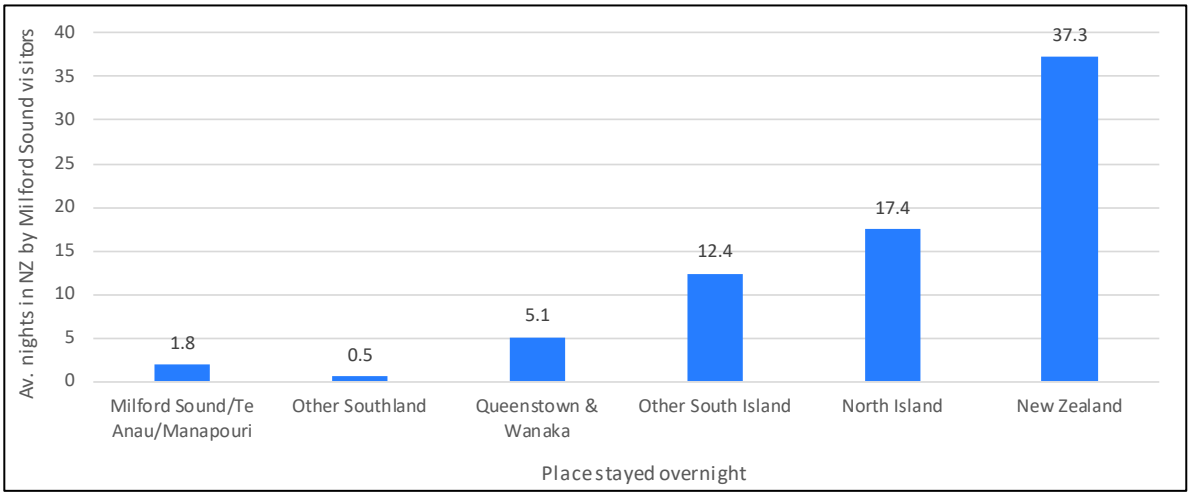
Annual average visitors to Milford Sound by travel purpose and visitor type 2014-19



Annual average visitors to Milford Sound by travel style and international port of entry 2014-19



Average annual nights spent in New Zealand by international visitors who visit Milford Sound 2014-19



Average nights spent in New Zealand by international visitors who visit Milford Sound 2014-19

APPENDIX 3: LONG LISTING

INTRODUCTION

This appendix section presents outputs from the long listing stage of the project. It first describes the process undertaken to develop a long list of options for the future of Milford Sound Piopiotahi from a tourism perspective, then it summarises these options along with the rationale upon which they are based and commentary from other workstreams.

Details from the baseline investigation stage that underpin many of the rationale are summarised in the Baseline sections of this report (sections 2 to 6), with key high-level insights and useful figures from these also included below where it aids interpretation.

KEY INSIGHTS FROM BASELINE INVESTIGATION STAGE

Below we summarise the main insights, issues and opportunities identified during the baseline investigation stage of the project that have informed the tourism long listing process.

EXPERIENCE AND ENVIRONMENT

Evaluations of visitor experiences in Milford Sound Piopiotahi are highly positive overall. For example, from 1,000 TripAdvisor reviews of visits made to Milford Sound Piopiotahi, almost all visitors (96%) rated their overall experience 'Very good' or 'Excellent'. The accompanying text comment components of the reviews were also predominantly positive (97%). Around half of the reviews included some specific 'visit recommendation' content and most of the remainder (48%) were highly positive (but contained no specific 'visit recommendation').

Negative aspects within the overall experience were noted by some but these were often qualified by reference to positive aspects (e.g., most notably that bad weather resulted in good waterfalls) and overall evaluations emerged as positive.

Negative aspects noted in reviews (and from past research studies) included weather (commonly qualified); aircraft noise, cruise boats and ships, crowding, visitor behaviour, service quality, unfulfilled expectations, and environmental factors. Some of these appeared more significantly negative for people participating in 'remote-experience/wilderness' types of activities around Milford Sound Piopiotahi (e.g., climbers using Homer Hut) or activities not associated with the mainstream tour-boat activities (e.g., Deepwater Basin users, private boaties), and among people with a more extended presence/history in the Milford Sound Piopiotahi area (e.g., workers in the village). Even among those citing higher levels of negative impacts (e.g., Deepwater Basin Users), however, the overall activity satisfaction expressed was high.

Past research findings tended to highlight higher levels of negative aspects where these aspects were presented to survey respondents for response, as opposed to where unprompted open-ended questions were asked.

Some non-research consultation feedback from individuals from wider public and recreation sector groups suggested some negative association of Milford Sound Piopiotahi with perceived 'over tourism'.

The Milford Sound village is run down, poorly planned and lacks the design integrity one would expect from a world-class tourism attraction. This results in unnecessary crowding, reduced revenue generation and poorer experiential outcomes (Plates 1 and 2).

Plate 1: Poor Milford Village Parking Design

Plate 2: 'No entry' signage conflicts with DOC visitor signage

Milford Sound Piopiotahi does not have a compelling context or narrative woven through it – it is only about the landscape. Adding a pre- and/or post-colonial narrative could create significant additional value and would provide an opportunity for Mana Whenua values and stories to be reflected in the visitor experience.

While perceived negative aspects of Milford Sound Piopiotahi are generally highly outweighed by the quality of the overall landscape and visitor experience, they do represent areas of visitor experience quality compromise. In this respect they represent key opportunities for improvement.

The Milford Road is a significantly positive component of the overall visitor experience, with Milford Road and Corridor Activities being among the top positive themes in the 1,000 TripAdvisor review comments that were analysed in detail.

SEASONALITY AND CONGESTION

VISITATION TO MILFORD SOUND PIOPIOTAHI IS HIGHLY SEASONAL

62% of visitors to Milford Sound Piopiotahi arrive in the 5 months between November-March and 27% of visitors arrive in the two busiest months, January and February (Figure 1).

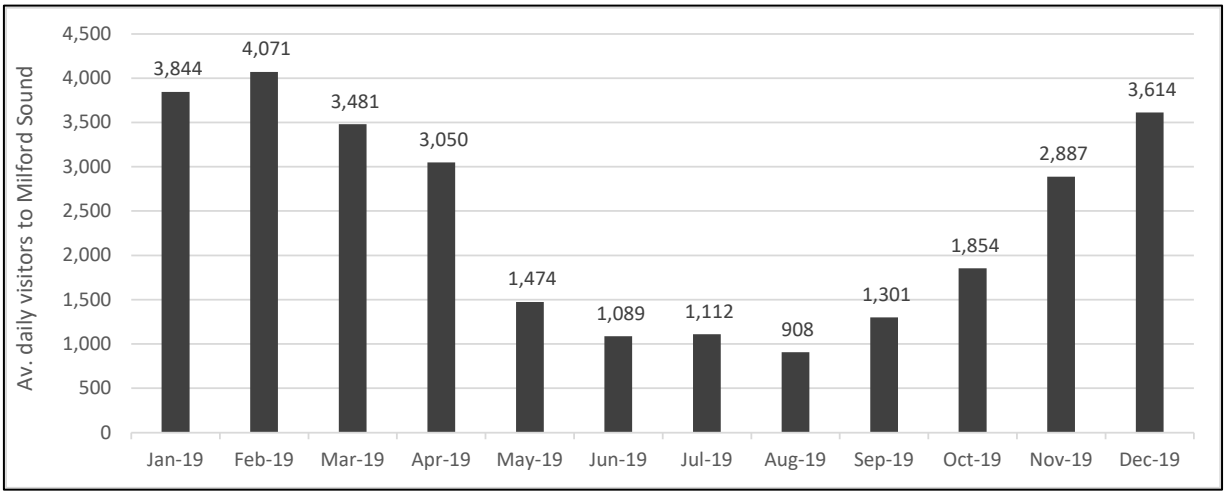


Figure 67: Av. daily visitors to Milford/month
(Milford Sound Tourism)

The strong seasonality creates infrastructure pressures in peak months and leaves operators with relatively low income during the rest of the year. These conditions are likely to be deterrents to new investment.

"TIDAL" VISITOR FLOWS CREATE CONGESTION ISSUES ON SH94 AND AT MILFORD SOUND PIOPIOTAHI

The "cul-de-sac" nature of SH94, combined with the lack of accommodation in Milford Sound Piopiotahi, means that almost all visitors enter and exit Milford Sound Piopiotahi on the same day. This creates a "tidal" flow of visitors which is evident in Figures 2 and 3.

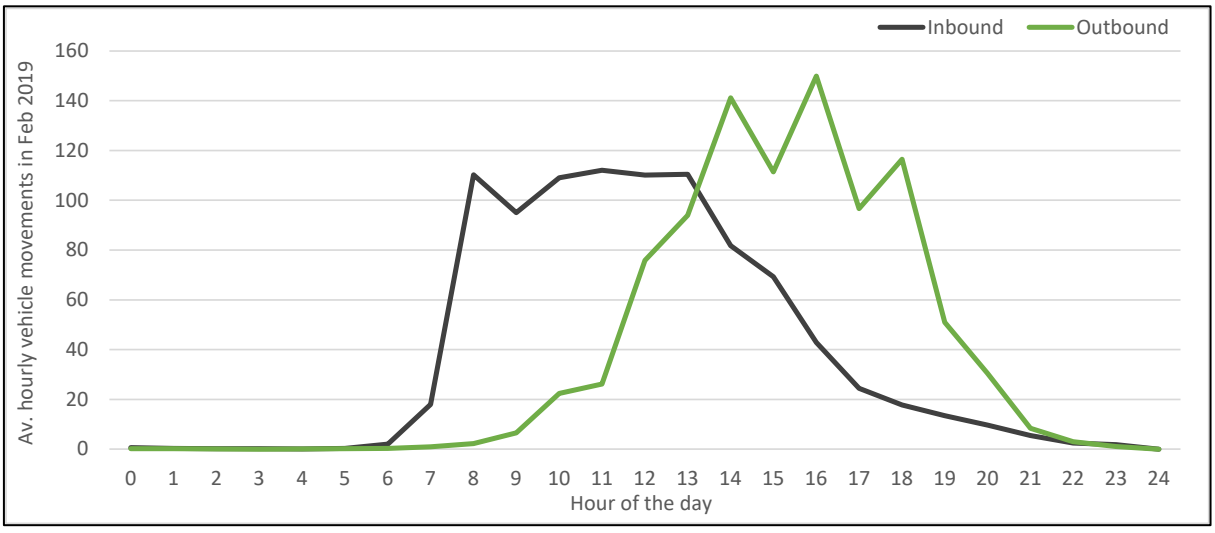


Figure 68:: Av. hourly vehicles to/from Milford, Feb 2019
(NZTA telemetry data for the Homer Tunnel)

The inbound vehicle flow peaks between 8am and 1pm, and the outbound flow begins at around midday. The tidal pattern of visitation causes significant congestion at the Homer Tunnel in the late morning/early afternoon period when the two flows meet.

It also creates congestion in Milford Sound Piopiotahi itself between ~11am-3pm, with the average number of vehicles in Milford Sound Piopiotahi peaking at around 450 at 1pm. The high concentration of visitors in the middle of the day creates issues with parking availability and overcrowding which are detracting from the visitor experience.

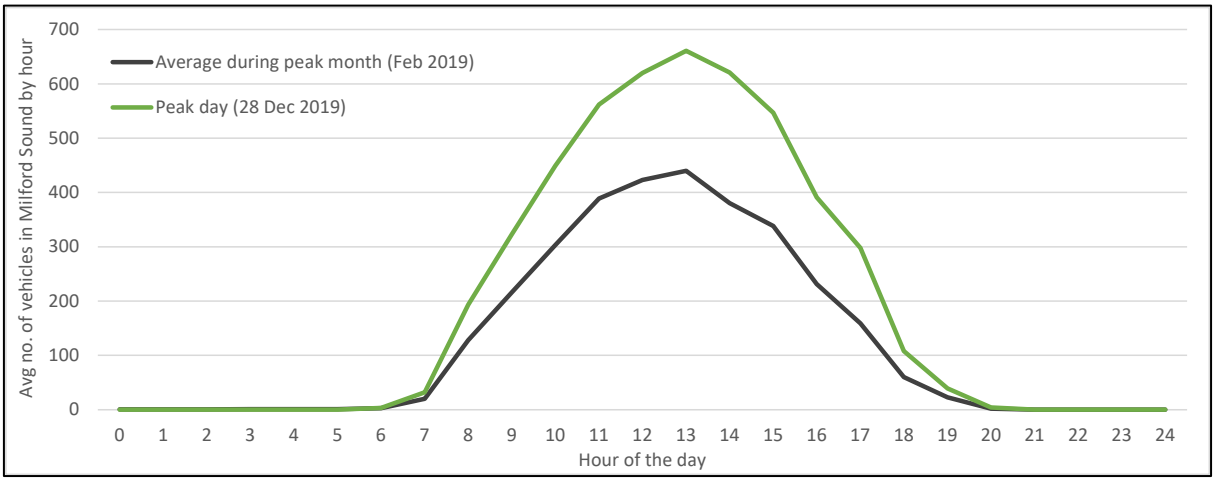


Figure 69: Av. no. vehicles in Milford/hour, Feb 2019
(NZTA telemetry data for the Homer Tunnel)

CRUISES OPERATE BELOW CAPACITY MOST OF THE TIME

The average utilisation rate of the cruise vessels operating in Milford Sound Piopiotahi varies between 23% in August and 52% in February (Figure 4), with an average across the year of 40%. These utilisation rates are calculated against *scheduled* capacity which is only a subset of total capacity i.e., boat owners could schedule more cruises outside peak demand periods if there was sufficient demand to support them.

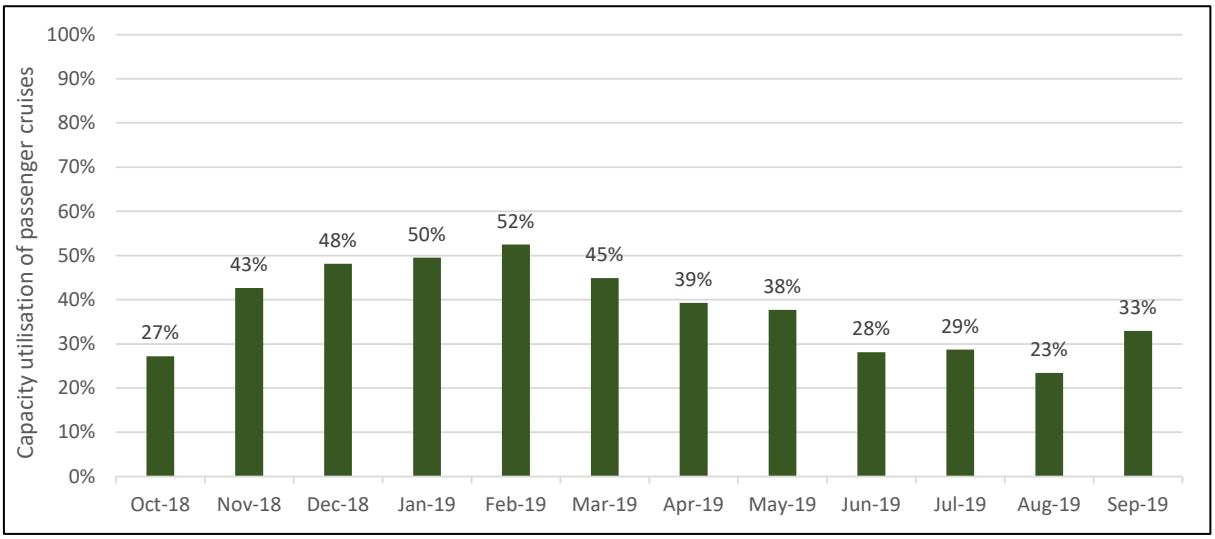


Figure 70: Boat cruise capacity utilisation, 2018/19
(Milford Sound Tourism, Fresh Info)

The current boat fleet could absorb a significant amount of additional demand, especially outside the current 1-2pm peak. The main constraint on growth is the time of day that passengers arrive in Milford Sound Piopiotahi, rather than the overall number of visitors. With a more uniform demand profile across the day, it would be possible for boat operators to carry many more passengers while at the same time reducing congestion in Milford Village.

TRAVEL PATTERNS

The Milford Sound Piopiotahi experience is predominantly centred around boat cruises and first time/one-off visitors. Around 95% of visitors to Milford Sound Piopiotahi take a cruise, with the remaining 5% engaging in kayaking or walking (e.g., on the Milford Track which terminates at Milford Sound Piopiotahi). Very few visitors appear to engage in other activities around the village area, with the possible exception of the Milford Foreshore walk.

Around 55% of international visitors to Milford Sound Piopiotahi stay overnight in the local area (Milford Sound Piopiotahi/Milford corridor/Te Anau/Manapouri). The remaining 45% are day

visitors from further afield, predominantly Queenstown, which is an 8+ hour return drive. These proportions differ considerably by nationality (Figure 5). The prevalence of day-tripping negatively impacts on local value capture, congestion and the visitor experience.

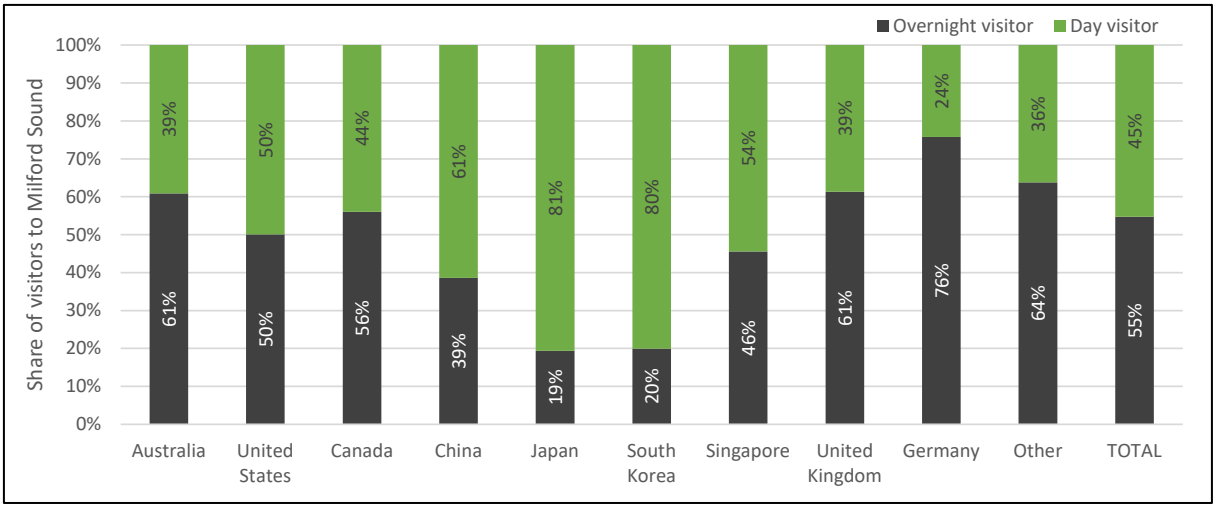


Figure 71: Share of int. visitors to Milford by type (International Visitor Survey)

Most visitors to Milford Sound Piopiotahi who stay overnight in the local area stay in Te Anau (79% of visitor nights). A further 17% stay in Milford Sound Piopiotahi itself or the Milford corridor and 4% stay in Manapouri (Figure 6).

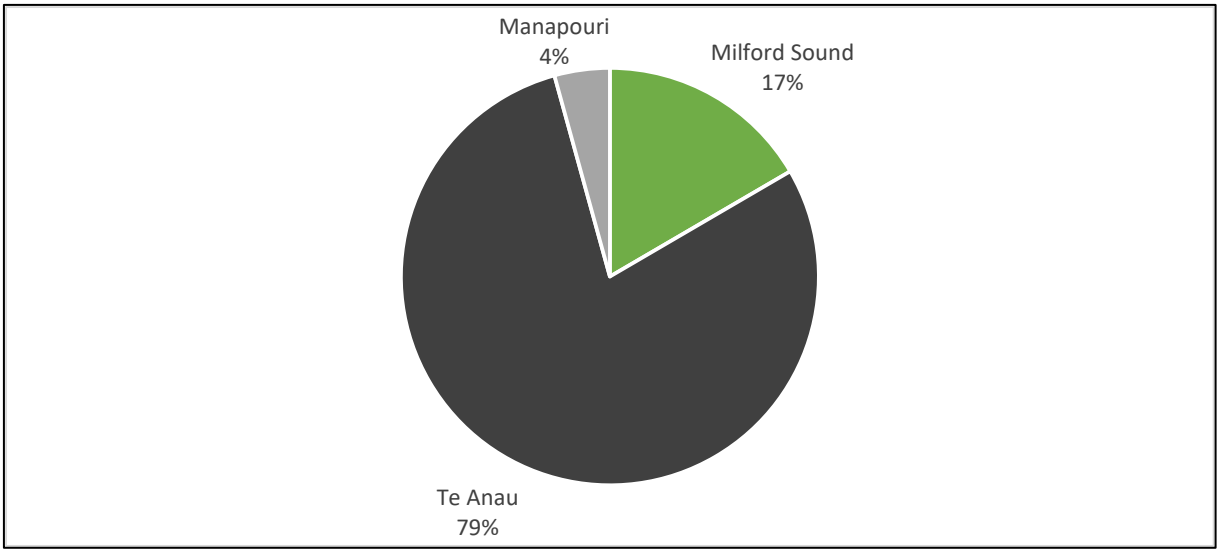


Figure 72: Where int. visitors to Milford stay overnight locally. (International Visitor Survey)

90% of all international overnight visitors to Manapouri, and 83% of all international overnight visitors to Te Anau, also visit Milford Sound Piopiotahi (Figure 7). It is reasonable to assume that a lot of this visitation would not occur in the absence of Milford Sound Piopiotahi.

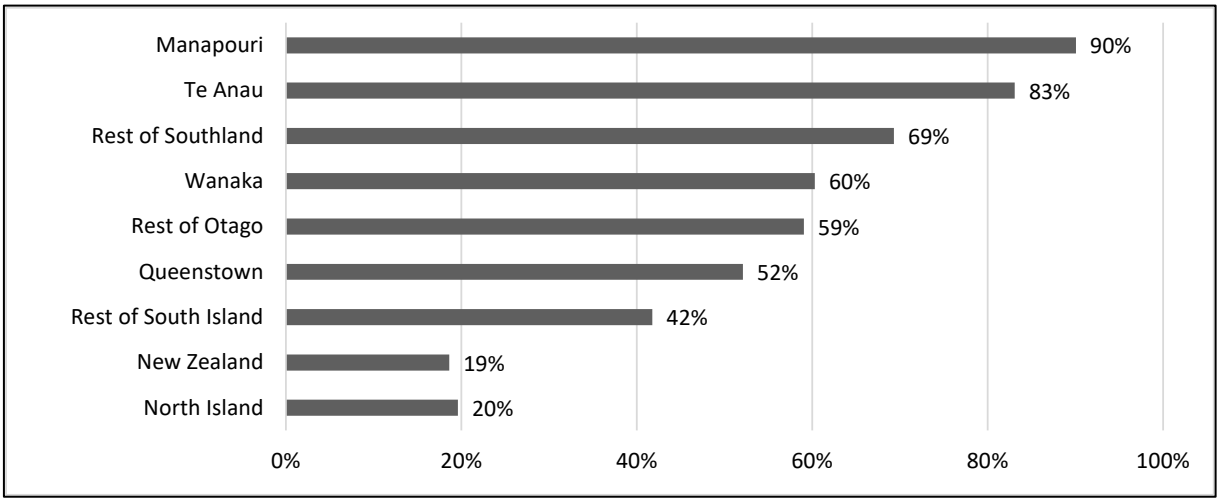


Figure 73: Proportion of int. visitors also visiting Milford, Feb 2019
(International Visitor Survey)

MILFORD CORRIDOR CAMPING AND TRACK DEMAND

Use of DOC campgrounds in the Milford Corridor has increased rapidly in recent years. Annual combined use of the eight DOC Conservation Campsites between Te Anau and Milford Sound in 2018-2019 was 400% (45,000) higher than in 2013-2014 (Figure 8).

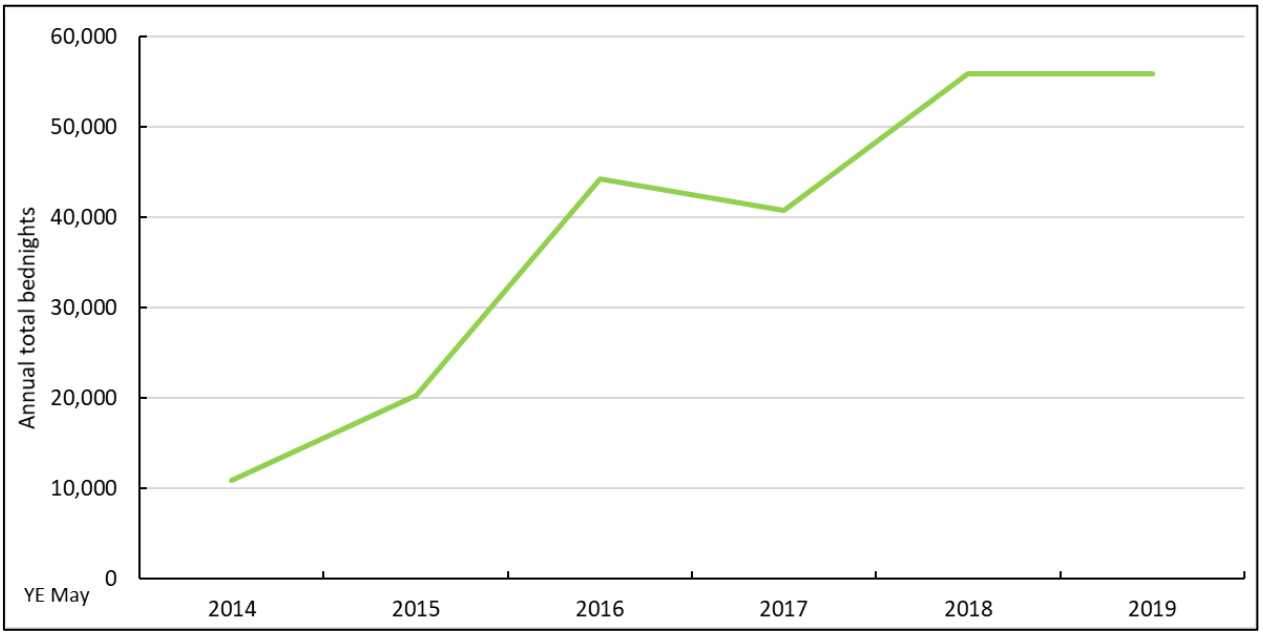


Figure 74: Annual bed night growth – total DOC Campsites
(DOC campsite fee returns)

By volume Cascade Creek has had the most growth in usage since 2014 (higher by >400%/32,000), with other sites following to varying degrees. Cascade Creek is the last accommodation option before reaching Milford Sound and is often used by those on early boats.

Many DOC tracks have grown in popularity over the past ten years, in some locations dramatically (e.g., Lake Marian, Gertrude Valley). For example, the number of annual users of the Lake Marian Track has increased by around 300% in the last 5 years (Figure 9). The Lake Marian track is located a short distance down the Hollyford Road after the turnoff from the Milford Highway.

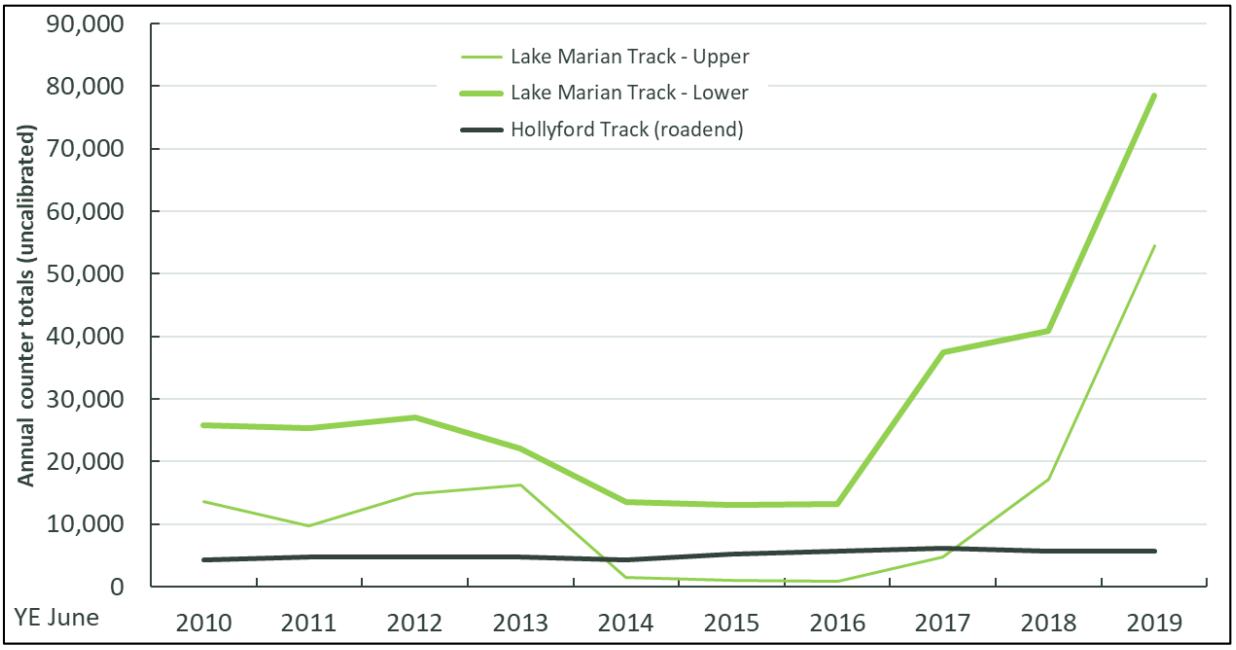


Figure 75: DOC Counter records (10yrs): Lake Marian

LONG LIST INPUTS

The following inputs have informed the Tourism workstreams' long listing process (see Figure 10):

- Options for change developed in Phase 1 of the Milford Opportunities Project;
- Research and domain expertise from the baseline stage of this project (including public and stakeholder input and a consultation survey);
- Brainstorming by the project team to generate a first cut of ideas;
- Project team workshops to develop and refine ideas from the brainstorming process;
- Reference groups to understand stakeholder perspectives; and
- Client meetings (Project Working Group and Governance Group) to test and further refine long list ideas.

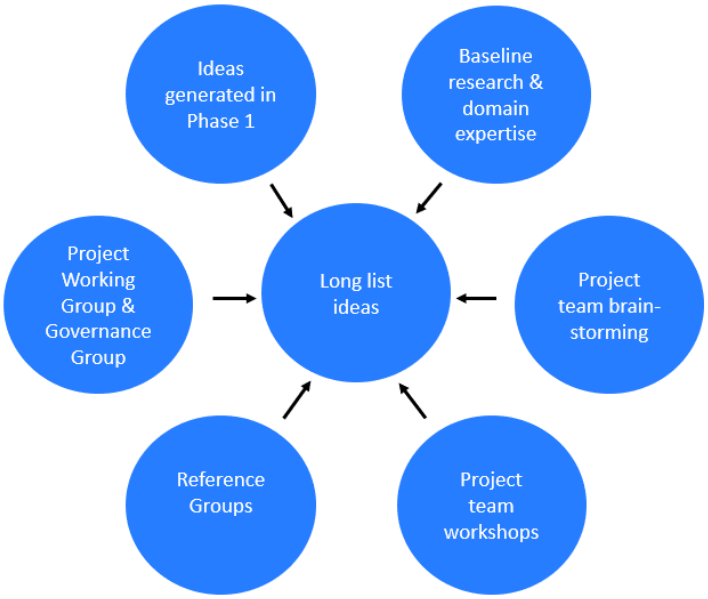


Figure 76: Long list inputs

MAIN THEMES

From a tourism perspective, the main themes that have emerged from the long listing process are summarised in Table 31:

Table 31: Main tourism themes emerging from long listing process.

Main tourism themes from long listing process	Grouped focus areas
1. Implement a transport and access system that assists destination planning objectives including improved visitor experiences. *Note: Long list ideas relating to the way in which people access Milford Sound Piopiotahi are captured in the Transport & Access workstream report (workstream 4)*	All areas
2. Develop a compelling suite of experiences in Milford Sound Piopiotahi to encourage visitors to stay longer and contribute to the local economy.	Milford Sound Piopiotahi
3. Redesign Milford Village to lift the quality of the physical environment and help deliver a world-class experience.	
4. Enhance the Milford Corridor experience to strengthen the options available to visitors.	Milford Corridor
5. Develop Te Anau as a sub-regional visitor hub to encourage more visitors to stay overnight.	Te Anau & surrounds
6. Strengthen the visitor offering around Te Anau to extend the visitor network.	
	All areas

Specific long list ideas relating to themes 2-5 are outlined more fully in the extended section below (Table 32).

Long list ideas relating to the way in which people access Milford Sound Piopiotahi are captured in a separate workstream report authored by the Transport & Access workstream (workstream 4). The Tourism team has had significant input into this, reflecting the fact that the choice of access model will be key to resolving the current congestion issues and delivering a sustainable, high-quality visitor experience.

Other long list topics sit principally with other workstreams and are addressed in separate reports.

LONG LIST IDEAS

This section outlines specific long list ideas for change in relation to the five main themes identified from section 7 (excluding Transport and Access which is covered separately in workstream 4 reports). The themes are termed "main ideas", with specific ideas relating to each theme termed "sub-ideas". The main ideas and sub-ideas are organised under the three spatial focus areas identified previously (in Table 31): Milford Sound Piopiotahi (2); Milford Corridor (Table 33); and Te Anau & surrounds (Table 34).

These tables reflect initial long list ideas based on initial engagement and preliminary analysis. Comment from the non-tourism workstreams is also noted. The ideas were later refined, and many were rejected or altered as they were analysed and discussed in more detail. The long list only assists in showing an evolution in thinking. The shortlist ideas represent the next iteration of thought and analysis (see section 8). The shortlist was approved for consideration in the master plan by the project Governance Group.

LONG LIST IDEAS – MILFORD SOUND PIOPIOTAHI

Table 32: Long List ideas - Milford Sound Piopiotahi

Item	Description	Rationale	Other workstream comments
Main idea 2: **Develop a compelling suite of experiences in Milford Sound Piopiotahi.**	Create a broader, more connected set of experiences in Milford Sound Piopiotahi. These experiences should be a mix of shore-based and on water activities and may include new walking tracks, interpretation, observation points, a marine research centre, visitor hub etc.	Current visitor management focuses on delivering a boat cruise endpoint. As well as little provision for much else, there is no coordination around defining or delivering key storylines associated with the area. This constrains the scope and depth of visitor experience opportunities and wider beneficial outcomes. Milford Sound Piopiotahi offers more visitor experience opportunities than just those associated with boat cruises. A stronger focus on shore-based activities would enable key site features and prime points of difference at Milford Sound Piopiotahi to be incorporated into the visitor experience. Enhanced experiential variety and depth would in turn enhance overall experience outcomes, interpretation opportunities, bad-weather options and revenue opportunities. Creating new attraction facilities appropriate to the site can also reduce perceived crowding by dispersing visitors and enabling the site to absorb and 'hide' more of them. Some latent demand for new opportunities in general is apparent from use patterns at other sites along the Milford Corridor and from visitor feedback. A lack of current opportunities was noted from visitor experience reviews and engagement survey responses. From the latter only 13% favoured the	Conservation: • Focus development of attractions within already modified / built areas. Development within primary forest or areas of higher conservation value such as the Cleddau Delta forest should be restricted to lower impact attractions such as walking tracks. New marine attractions to be cognisant of impacts on marine environments / fauna and should be located outside the existing marine reserve. • Great potential to have connected experiences of nature, wilderness, environments and habitat types within the project area. Opportunity for storytelling and providing learning experiences e.g., link to conservation management. Opportunity to provide a range of high-quality interpretation signage / education facilities that explain conservation values, threats, and management in a range of habitats and locations. Enhancing connection between visitors and conservation likely to lead to improved ongoing understanding and protection of the area. Cultural Values & Aspirations: • Broader experience offer is in keeping with manawhenua aspirations for whanau and manuhiri in Milford Sound Piopiotahi. • Curated exhibition of places and sites important to the manawhenua stories and connections with the place.

		current status quo. Of the 87% favouring some new opportunities, most (79%) indicated they preferred new natural experiences either exclusively (38%) or in combination with built facility options (41%).	• Risk that key sites are left out because they don't work with the theme or there is no cohesion with the suite of activities. Master Planning: • Recommend considering a range of new walks, indoor activities and new experiences on land and water. • Opportunity to integrate cultural narrative
Sub-idea 2.1: **Develop new walking tracks and observations points in Milford Sound Piopiotahi.**	Develop new observation points and track network along the shoreline between Deep Water and Freshwater Basins, and along the river and ridgeline. Explore alternative transport modes to key observation points if justified.	Creating new tracks and observation points appropriate to the site can also reduce perceived crowding by dispersing visitors and enabling the site to absorb and 'hide' more of them. A lack of current opportunities was noted from visitor experience reviews and engagement survey responses. From the latter only 13% favoured the current status quo. Of the 87% favouring some new opportunities most (79%) indicated they preferred new natural experiences either exclusively (38%) or in combination with built facility options (41%).	Conservation: • Enhancing ridgeline and Bowen Falls track of relatively low impact. • Walking tracks generally low impact but should be designed to discourage straying from the track onto sensitive estuarine habitats at low tide. Some plant and bird species inhabiting the estuarine area are sensitive to disturbance and of high conservation value (At Risk species). • Presume ridgeline refers to area behind village (a walking track to water tank infrastructure already exists). Cultural Values & Aspirations: • In keeping with manawhenua aspirations for whanau and manuhiri in Milford Sound Piopiotahi. Interest in an outdoor experience in which to view Milford Sound Piopiotahi and feel the wairua of the place. Land Analysis: • Natural character consideration - avoid substantial modification to shoreline and river bank, avoid stopbanks - setback or boardwalk might be appropriate in places. Hazards & Visitor Risk: • Natural hazards will need consideration. Tsunami-resilient shelters spaced over delta so that walkers are never more than say 150m from a shelter. Master Planning: • Enable different landscape experiences / expand the offering. • Suitable for time poor tourists or those not going on a boat cruise.
Sub-idea 2.2:	An interpretive marine research centre located	Not all visitors want active outdoor experiences all the time. An inventory of experiences in Milford Sound	Conservation:

Establish an interpretive Marine Research. Centre in Milford Sound Piopiotahi.	within Milford Sound Piopiotahi (as part of the visitor hub). It would use a mix of live and recorded interpretation (remote control drone subs, fixed underwater cameras, shallow aquarium tanks, digital interpretation etc.). It would link with existing experiences such as boats, observatory, diving, kayaking etc, providing a hands-on experience.	Piopiotahi shows there are not many 'indoor' land activities, in particular those that link with the outdoors. Additional on-shore and ideally all-weather facilities/attractions such as a marine centre would provide wider visitor experience, interpretation and revenue opportunities. It would also 'absorb' visitor numbers at the site (especially in poor weather) and reduce congestion and crowding perceptions. Such an experience would highlight a key Milford Sound Piopiotahi point of difference (the unique marine environment) and stimulate demand for other attractions. A lack of current opportunities was noted from visitor experience reviews and engagement survey responses. From the latter only 13% favoured the current status quo. Of the 87% favouring some new opportunities, around half (44%) were open to experiences using built facilities).	• Increased level of understanding and opportunity to educate. • Marine facility considered high-priority by DOC for engagement / education / research. • The marine reserve at Milford Sound Piopiotahi would be a natural focal point for research / education. Land Analysis: • Discuss marine research centre with env reference group, e.g., Fiordland Marine Guardians. Master Planning: • Expands experience in inclement weather, or for those that do not want to do short walks outside.
Sub-idea 2.3: **Incorporate commercial fishing activities into visitor experience.**	Optimise ramps and commercial fishing activities as part of the visitor experience, bringing the current 'back of house' activity into the 'front of house', with tracks, observation points and interpretation (Note: this will keep visitors back from commercial activity in "safe observation zones". Accommodate recreational and commercial fishing needs e.g., dedicated infrastructure (trailer boat parking, ramps, jetties etc). Make these activities part of the interpretation on offer	Strategically incorporating existing non-tourism infrastructure and activities where they can contribute to visitor experiences and storylines can add value. There are opportunities for enhanced product offerings, especially associated with commercial fishing (e.g., retail products and/or activity options, aquaria, interpretation opportunities). A lack of current visitor experience opportunities was noted from visitor experience reviews and engagement survey responses. Keeps visitors in designated safe observation zones further away from recreational and commercial boat activity.	Conservation: • This is likely to be challenging and it could spread the impact of tourism further, for example impact of charter fishing on fish stocks. • Should not explicitly encourage or create new opportunities for recreational fishing due to potential for increased impact on fish stocks (including areas in proximity to marine reserve). Cultural Values & Aspirations: • In keeping with manawhenua aspirations for whanau and manuhiri in Milford Sound Piopiotahi. Land Analysis: • Working wharf creates character/sense of place. Hazards & Visitor Risk: • Yes, but natural hazard risk management and normal safe operating procedures will need to be a consideration. Master Planning: • Likely a memorable, authentic experience of Milford Sound Piopiotahi.

	to visitors (from a distance).		• Will need to carefully manage circulation/overlap between visitors and operators from a safety and functionality perspective.
Sub-idea 2.4: **Develop multimedia experience before and/or during exploration.**	Potential means of communicating information and storylines.	Improved coordination around storylines and enhanced delivery options at strategic connection sites could improve the scope and depth of visitor experiences and outcomes. Risk of inconsistency with natural theme/engagement with natural environment. Multimedia also requires significant investment and can date quickly.	Conservation: • Increased level of understanding and opportunity to educate. • Multimedia also provides an opportunity for those that aren't able to engage / interact with Fiordland / nature beyond the immediate road corridor and Milford Sound. Cultural Values & Aspirations: • Manawhenua are keen to utilise methods to tell authentic stories - exploring international examples for indigenous story telling in remote areas. Te Anau Basin: • Allows messaging about expectations of behaviour to be sent early so travellers are aware of harms caused by littering/pollution. Hazards & Visitor Risk: • Yes, also weave in facts and stories around hazards, risks and mitigations (centralised and visitor actions) from point of sale through to on-site signs and multimedia experiences. Master Planning: • Good idea if multi-media is part of branding and constantly evolving.
Sub-idea 2.5: **Restrict types of activities permitted in Milford Sound Piopiotahi.**	Regulate market utilisation of Milford Sound Piopiotahi to ensure a minimum level of experience quality is maintained and avoid race to bottom of the market.	Strategic alignment of appropriate facilities and services with desired target visitor experience outcomes (for visitors and key stakeholders) would enhance success. Unaligned facilities and services would be counterproductive. Careful master planning and design should help avoid race to bottom of market. Research and review findings indicated that high visitor experience outcomes were being sustained overall for most users, suggesting that any restrictions should be based on the alignment of overarching destination objectives and findings from targeted research.	Conservation: • Opportunity to shift focus from high impact activities e.g., cruise ships, adventure tourism, use of powered craft / aircraft in favour of higher quality environmentally sensitive attractions. • Development of high quality and compelling attractions linked to the landscape and conservation are more likely to provide opportunities for re-investment back into conservation. Master Planning: • Supported. Value should be placed on experience and number of cruise operators for example should be regulated to maintain high quality experience.

Main idea 3: **Redesign Milford Village.**	Lift the quality of Milford Sound Piopiotahi's built environment to reflect its world-class status. Objectives of redesign would include creating a compelling sense of arrival, improving visitor flows and wayfinding, separating 'back of house' and 'front of house' elements, and improving safety.	The existing design of the village is fragmented and undermines the visitors' experience. Arrival into the village is anticlimactic as visitors are greeted by a runway and car parks rather than natural vistas. The first 'reveal' should create a 'wow' moment and stimulate excitement and anticipation. The site's 'front of house' and 'back of house' elements are intermingled, and the patchwork nature of concessions further complicates the creation of quality visitor experiences. Redesign of the village could also improve visitor safety in the event of a natural disaster. For example, concentrating built structures (visitor hub, accommodation etc.) in the safest location.	Conservation: • Opportunity to enhance ecological values and limit existing impacts (e.g., by consolidating building footprints, upgrading the sewerage system, reducing impervious surfaces, limiting light pollution). • Enhancement of natural values could be indirect (allowing regeneration) or direct (removing sources of disturbance). • Placement of infrastructure important. Potential for ongoing greater impacts than status quo if not designed appropriately. Would require input at all project stages from ecologists. • Redesign of village within the existing modified habitats could be undertaken with limited ecological effect. Consolidation of infrastructure and human disturbance would be beneficial for conservation values. Cultural Values & Aspirations: • Manawhenua are interested in sensitive, sustainable development/redevelopment that does not take away from the environment but adds to it. Also, want a point of arrival to Milford Sound Piopiotahi. • This has been the process in the past but has never been carried through to completion. Hazards & Visitor Risk: • Agree, whole village needs redesign from a hazards viewpoint. Ideally centralised visitor hub/hotel built to high EQ building code to withstand much of landslide-induced tsunami impact. Also distributed low-profile multi-purpose shelters around Cleddau delta. More discussion in hazards report. Master Planning: • Support the full redesign of the tired and poorly functioning village required to create a cohesive tourism hub.
Sub idea 3.1: **Create a compelling sense of arrival into Milford Sound Piopiotahi.**	Optimise arrival vistas by removing obstructive elements (e.g., buildings, carparks).	Arrival into the village is anticlimactic as visitors are greeted by a runway and car parks rather than natural vistas. The first 'reveal' should create a 'wow' moment and stimulate excitement and anticipation. The engagement survey found that only 40% of respondents favoured the status quo i.e., having no defined gateway experience. The majority (60%) favoured some sort of 'arrival' acknowledgement	Conservation: • Agree, opportunity to highlight the area's natural values. Some mature trees between the airport / foreshore and road are important connecting habitat for forest birds and should be retained.

		(most frequently for a location around the Homer Tunnel or upon first viewing Milford Sound Piopiotahi).	• If this can be done in a way that minimises clearance of primary vegetation / mature trees then there would be limited ecological effect. Cultural Values & Aspirations: • In keeping with manawhenua aspirations for whanau and manuhiri in Milford Sound Piopiotahi. • Manawhenua want the arrival to uphold the mana of Tu Te Rakiwhanoa and to feel the wairua. Te Anau BasinStudy: • A previous initiative has tried to obtain funding to build a waharoa (gateway) at Te Anau. The concept has already been developed and was going to integrate with plans for another waharoa on the Milford Corridor. By having multiple Waharoa you can graduate the visitor through an immersive cultural experience. Land Analysis: • To reduce visual effects of buildings and structures in the view, these should be set back towards the rising landform, keeping the views towards the fiord open. Master Planning: • Very much needed. • Contributes to the overall experience, sense of place. • Consider relationship with other parts of the World Heritage site and close geographical relationship with the Murihiku Rohe.
Sub-idea 3.2: **Establish new Milford Sound Piopiotahi Visitor Hub.**	Central hub serving as a distribution compass for visitors to Milford Sound Piopiotahi. Located on the raised area which is the site of the existing lodge. The hub would be the core transport hub for buses and would accommodate interpretive and food & beverage services	Creating a centralised hub enables visitors to be directed around the site more efficiently so they can find and undertake the experiences they are more aligned to. This creates an overall improved experience and better revenue generation (a "compass" hub and spoke circulation model). Currently the site's 'front of house' and 'back of house' elements are intermingled, and the patchwork nature of concessions further complicates the creation of quality visitor experiences. The Freshwater Basin Boat Terminal is currently the defacto visitor hub. This terminal is poor from a site	Conservation: • Opportunity to enhance ecological values and limit existing impacts (e.g., by consolidating building footprints, upgrading the sewerage system, reducing impervious surfaces, limiting light pollution). • Enhancement of natural values could be indirect (allowing regeneration) or direct (removing sources of disturbance). • Placement of infrastructure important. Potential for ongoing greater impacts than status quo if not designed appropriately. Would require input at all project stages from ecologists.

	(together with accommodation if required).	visitor flow perspective and has an elevated rock fall risk in earthquakes (with few mitigation options). The benefits of a centralised visitor hub would include: • Optimal circulation point for distributing visitors within Milford Sound Piopiotahi; - ability to sieve visitors; - reduces perceived crowding (reduces visitor cross flows, allows access loops etc.); - smaller condensed asset footprint; - central location making visitor distribution to different 'zones' easier (either with buses or on foot); • Concentrates assets and visitors in the safest location from rockfall, tsunami and flooding; • Better revenue generation; • Better protection from inclement weather. The consultation survey found that only 21% of respondents favoured the status quo in terms of Visitor/ Information Centre functions. Just 16% preferred an enhanced status quo in the terminal. The majority (63%) favoured some sort of service enhancement with highest preferences for a stand-alone visitor centre either in the terminal (28%) or elsewhere in a prominent location (29%).	• Redesign of village within the existing modified habitats could be undertaken with limited ecological effect. Consolidation of infrastructure and human disturbance would be beneficial for conservation values. Land Analysis: • To reduce visual effects of buildings and structures in the view, these should be set back towards the rising landform, keeping the views towards the fiord open; single-storey buildings could be visually accommodated in central location. Hazards & Visitor Risk: • Agree, whole village needs redesign from a hazards viewpoint. Ideally centralised visitor hub/hotel built to high EQ building code to withstand much of landslide-induced tsunami impact. Also distributed low-profile multi-purpose shelters around Cleddau delta. More discussion in hazards report. •
Sub-idea 3.3: **Develop new hotel accommodation.**	Higher-end hotel accommodation adjoining the main Milford Sound Piopiotahi visitor hub. Would share food & beverage with other hub components. Note: This was later modified to consider Mid or higher end visitor accommodation (or a mix).	Visitor accommodation would assist with 'after hours' use of assets and early morning activities. Assisting the localised network's viability and premium revenue generation opportunities. A premium price could be charged potentially with conditions (minimum stays etc.). An overnight option assists other activities in the area (great walks etc.). Existing accommodation offerings in Milford Sound Piopiotahi are commanding a high price point.	Conservation: • Preferable to consolidate developments at Mitre Peak Lodge site rather than expansion of Milford Sound Lodge. • Clearance of forest to construct new buildings (hotel) would have high levels of ecological effect compared to utilising existing modified areas. • Hillside forests behind the village are intact, mature native forests that have undergone little / no historical disturbance. • If located against the hillside, underground parking could be an efficient use of space. Land Analysis:

		Viable evidence points to a demand for accommodation that enables a longer duration of stay. The economic feasibility of a new hotel would need to be carefully examined, particularly given high up-front development costs and the requirement to provide ongoing staff accommodation. The engagement survey found that only 19% of respondents favoured the status quo in terms of accommodation options. Just 10% preferred a high-end option focus but 44% preferred more accommodation options generally (including for staff). Only 23% preferred no accommodation (other than for staff).	• From a visual perspective, a hotel would be best located against a change in landform rather than in an open space, so that backdrop is provided. Against the hillside is probably the best location from a visual perspective. • Mitre Peak lodge (Ultimate Hikes) site is probably the second-best location from a visual perspective. • The aerodrome site is less appropriate from a visual perspective as there would be relatively high visual effects here. Given the prominent central location of the aerodrome site, the building would probably need to be single storey so that it does not intrude into views. Hazards & Visitor Risk: • Agree that against the hillside looks like best location from resilience analysis to date (subject to further ground investigation). • Aerodrome site and Mitre Peak Lodge site are flat, prone to liquefaction, and have limited protection from hills or access to hills. Prefer base of bluff for best resilience for visitor hub & hotel. Master Planning: • Yes, existing hotel is outdated and potentially located in the wrong location. Any new hotel needs to be a world class architectural building and destination. • Hotel locations will be considered in terms of landscape sensitivity and needs to be part of a visitor hub.
Sub-idea 3.4: **Redevelop cruise terminal.**	Create a more streamlined terminal to become a single purpose building. Replace the façade of the cruise terminal. Remove terminal carparks.	The terminal could be reimagined, potentially with a smaller scale / bulk (especially if people are pulsed from the main visitor hub). The current terminal does not fit the proposed transportation model. Functionally it is not designed to quickly “pulse” visitors on and off boats and onto transport.	Conservation: • Could provide an opportunity to consolidate the infrastructure footprint and re-habilitate other areas. Land Analysis: • Visual benefits from removing existing clutter. Hazards & Visitor Risk: • Would probably need complete re-build to make resilient to landslide-induced tsunami.
Sub-idea 3.5:	Relocate the main visitor boat terminal	Such a relocation would mitigate the rock fall risk at the current Freshwater Basin site. It would also allow the terminal to be reimagined, potentially with a	Conservation:

Move cruise terminals/ ports.	back to Deep Water Basin. Note: This idea was later terminated because of hydrology issues.	smaller scale / bulk (especially if people are pulsed from the main visitor hub). A relocation could also be consistent with a desire to incorporate the current commercial fishing activities at Deepwater Basin into the visitor experience. A lack of current visitor experience opportunities was noted from visitor experience reviews and from consultation survey responses.	• If this occurs, develop terminal within existing modified areas at Deepwater Basin rather than expanding north into estuarine areas / delta forest. Land Analysis: • Terminal building in Deepwater Basin would have higher visual effects due to openness of area than in current location at Freshwater Basin where it is set against the rising landform. Hazards & Visitor Risk: • Would remove high cruise visitor concentrations from rockfall risk. • Significant investment. Deepwater Basin requires further investigation of pile founding conditions, etc. Also, distance issues from proposed hub (consider shuttles and/or enclosed walkway). Master Planning: • Possible implications for boat timetabling - Deepwater Basin harder to operate from if schedule is tight (as it is now in peak times).
Sub-idea 3.6: **Exclude cruise ships from Milford Sound Piopiotahi.**	Remove cruise ships from Milford Sound Piopiotahi to reduce negative experience perceptions and environmental impacts.	Would reduce the occurrence of negative experience perceptions related to on-water and commercial activity (such as visual impact) and/or physical effects such as smoke and noise. Reduces the risk of environmental impacts should a ship experience an emergency (such as oil spill, a sinking). Direct economic benefits locally also appear low. However, while negative perceptions were noted by some visitors, overall visitor experience evaluations from a very high proportion of visitors appear to be little affected by the activities/presence of cruise ships. Research and review findings did not feature significant negative cruise ship impact perceptions (apart from Deepwater Basin users and this survey included tour boats). The engagement survey found that only 30% of respondents preferred no cruise ships, with most considering them acceptable – mostly with management to reduce any impacts or risks.	Conservation: • Agree. Concerns about discharges to air and water, marine biosecurity concerns, noise, emergency anchoring gear damaging seafloor habitats, potential for accidents e.g., diesel / oil spills. • Good opportunity to reclaim regulation / control over industry and also to increase quality of other visitors' experience. • If cruise ship visits are to continue, Milford Sound is the most appropriate location. Other fiords are less modified and there are increasing concerns about visitor interactions with wildlife elsewhere including on some predator-free islands (visitors on cruise ship tenders seeking out kakapo on Anchor Island a serious concern). Cultural Values & Aspirations: • Has not been specifically discussed by manawhenua but there was interest in reducing people movements and obstructions, to enable people to feel the place in their own time. Land Analysis:

			• Cruise ships have effect on landscape and natural character and removing them would have benefits. • Some fiords may be more suitable to visually accommodate cruise ships, depending on views, openness/enclosure, and scale of fiord. Master Planning: • Worth considering and potentially diverting to other sounds. Hazards & Visitor Risk: • Cruise ships require highly experienced pilotage. Milford Sound represents a confined space relative to their size and turning ability, and night hours or adverse weather with poor visibility need 'blind pilotage' using electronic systems. With proper equipment and training incidents are rare, but things can go wrong as happened to L' Austral in 2017. This can present some risk to passengers or other water users, but is unlikely on its own to be sufficient justification for excluding cruise ships from the Fiord.
Sub-idea 3.7: **Remove carparks from shoreline.**	Remove infrastructure that supports motorised transport from the waterfront. Retain some vehicle /campervan parking in designated unobtrusive areas.	Removing carparks would give people the front seat at the shoreline. Should be considered as part of transport & access model. The engagement survey found that only 20% of respondents favoured the status quo in terms of foreshore paid parking. Most (62%) favoured options involving more distant free parking with shuttle services (17% considered bus parking was an exception).	Conservation: • Reduces disturbance of fauna from vehicle noise in estuarine area and opportunity to highlight the area's natural values. • Utilise existing modified area for any carparking rather than clearing new areas. Cultural Values & Aspirations: • Has not been specifically discussed by manawhenua but there was interest in reducing people movements and obstructions, to enable people to feel the place in their own time. Te Anau Basin Study: • Freedom Camping Act allows controls to protect access to an area and to protect people. Land Analysis: • Visual benefits from locating structures towards the back of the village against the rising landform. Master Planning: • Tourism infrastructure needs to be located away from sensitive water edge and any walkways/shelters along edge will need to be considered against conservation values.

			• Recommend sustainable transport modes are considered and campervans may not be allowed into the village (unless they have an overnight booking).

LONG LIST IDEAS - MILFORD CORRIDOR

Table 33: Long List ideas – Milford Corridor

Item	Description	Rationale	Other workstream comments
Main idea 4: **Enhance the Milford Corridor experience**	Create compelling stops along the corridor to expand the options available to visitors.	Creating additional high-quality experience and/or accommodation options along the corridor would increase the depth and range of visitor experiences available and give visitors more reasons to spend time and money in the local area. Stops would include complementary but also potentially independent additional activity and experience opportunities. Research and review findings indicated high visitor experience outcomes at sites along the Corridor, and that this was a key positive element of overall Milford Sound Piopiotahi visits (and for those to a number of specific standalone sites along the way).	Conservation: • Formalising a small network of stopping points rather than having a large number of informal stopping points is preferable, so that visitor impacts (rubbish, wildlife interactions) can be minimised and managed. For example, current management of kea interactions at tunnel portals, Monkey Creek is woefully inadequate which leads to serious impacts on the local kea population. • Large number of stops already exist with little opportunity to expand the road footprint in most places beyond Knobs Flat (due to proximity of intact forest, lakes, rivers, other geographical constraints) Cultural Values & Aspirations: • In keeping with manawhenua aspirations for whanau and manuhiri in Piopiotahi if well considered and curated. Transport & Access: • Creates a more immersive experience on the Milford Road. • Needs a step change in access from unrestricted to managed to make this work. Land Analysis: • Needs to be located in an appropriate location - supportive if done well. Hazards & Visitor Risk: • Yes, but natural hazard risk management and normal safe operating procedures will need consideration.
Sub-idea 4.1:	Develop a strong entry threshold (potentially a large statement such as 20m Pouwhenua or	A strong threshold needs to be created so visitors understand they are moving from a farming environment into the National Park. This is important because crossing this	Cultural Values & Aspirations: • In keeping with manawhenua aspirations for whanau and manuhiri in Piopiotahi if well considered and curated.

Item	Description	Rationale	Other workstream comments
Develop National Park entry threshold.	cultural sculptural element) at the gateway to the national park.	threshold brings with it certain expectations of behaviour and new social norms (care for the environment, no littering, greater cultural respect etc.). Most visitors are unaware of the start of the Park. We also want to begin elevating the visitors' experience and sense of arrival and anticipation. A strong threshold pulls the park closer to Te Anau in the minds of visitors (strengthening Te Anau's role as the entry hub). With respect to Milford Sound Piopiotahi, the engagement survey found that only 40% of respondents favoured the status quo in terms of having no defined gateway experience. The majority (60%) favoured some sort of 'arrival' acknowledgement. There were some responses indicating that such a function could be fulfilled (or complemented) back down the Milford Road (even to Te Anau – especially as part of a wider interpretive approach).	• Manawhenua want the option to decide the visual representation rather than it specified in the Masterplan. Transport & Access: • Thresholds are a very effective way to communicate a change in the transport environment. • Supported but noting that this needs to be authentic - not an artificial construct because of its entry point location. Te Anau Basin Study: • A previous initiative has tried to obtain funding to build a waharoa (gateway) at Te Anau. The preliminary concept was going to integrate with plans for another waharoa on the Milford Corridor (and other potentially around the region). By having multiple Waharoa you can potentially graduate the visitor through an immersive cultural experience. Land Analysis: • Needs to be located in an appropriate location - supportive if done well. Master Planning: • Entry needs demarcating - currently missed opportunity.
Sub-idea 4.2: **Knobs Flat experience hub.**	Create an experience hub at Knobs Flat, including a café, walking/cycling opportunities, and possible research centre.	Significant latent demand appears to exist for activity options in the Milford Corridor. We want the ability to offer a spectrum of experiences at different price points. This can generate revenue for reinvestment. It would also provide an ability to grow the corridor as a family-friendly and multi-activity destination in its own right, while at the same time providing accommodation options for visitors to Piopiotahi. The consultation survey found that only 23% of respondents favoured the status quo in terms of Milford Road Visitor Sites/Activities. The majority (75%) favoured either improved current (31%) or	Conservation: • Consolidates disturbance in one location. • Indirect effects of noise, lighting, pollution etc. on threatened forest species (bats, kaka, mohua) in nearby habitats would need to be carefully managed. • Areas of grassland dominated by exotic species in the vicinity of Knobs Flat, and the existing 'village' area are appropriate for accommodation facilities via redevelopment of the existing footprint and expansion of the footprint in modified grassland areas. Cultural Values & Aspirations: • In keeping with manawhenua aspirations for whanau and manuhiri in Piopiotahi if well considered and curated. Manawhenua are interested in sensitive, sustainable development/redevelopment that does not take away from the environment but adds to it.

Item	Description	Rationale	Other workstream comments
		new (31%) site activity options. In terms of accommodation options along the Milford Road, many (45%) preferred at least improved current options.	Transport & Access: • Helps create a more immersive experience on the road. Better than Knobs Flat being a pit stop on the road. Land Analysis: • Needs to be located in an appropriate location - supportive if done well; avoid clutter and sprawling development; locate within a cluster of development against landform backdrop, minimising effect on openness; use vegetation for screening. Hazards & Visitor Risk: • Yes, but natural hazard risk management and normal safe operating procedures will need consideration.
Sub-idea 4.3: **Knobs Flat accommodation hub.**	Create an accommodation hub at Knobs Flat, potentially offering a range of accommodation options including family cabins, eco lodge, and campervan/tent sites.	Significant latent demand appears to exist for accommodation options in the Milford Corridor. Knobs Flat is a logical hub area due to its size, location, proximity to activity options (e.g., Eglinton River, Dore Pass Route) and background uses. The engagement survey found that only 30% of respondents favoured the status quo in terms of Milford Road Visitor accommodation options. The majority (62%) favoured either improved current options (45%) or new (17%) options. In terms of activity options along the Milford Road, most (75%) preferred new (44%) or at least improved current (31%) options.	Conservation: • Consolidates disturbance in one location. • Indirect effects of noise, lighting, pollution etc. on threatened forest species (bats, kaka, mohua) in nearby habitats would need to be carefully managed. • Areas of grassland dominated by exotic species in the vicinity of Knobs Flat, and the existing 'village' area are appropriate for accommodation facilities via redevelopment of the existing footprint and expansion of the footprint in modified grassland areas. Cultural Values & Aspirations: • In keeping with manawhenua aspirations for whanau and manuhiri in Piopiotahi if well considered and curated. Manawhenua are interested in sensitive, sustainable development/redevelopment that does not take away from the environment but adds to it. Transport & Access: • Creates more accommodation options on the road. • Encourages camper vans quite a way into the park. Question whether this is the desired outcome. Camper vans could be one of the trickier parts of any managed access model. Land Analysis: • Needs to be located in an appropriate location - supportive if done well; avoid clutter and sprawling development; locate within a cluster of

Item	Description	Rationale	Other workstream comments
			development against landform backdrop, minimising effect on openness; use vegetation for screening. Hazards & Visitor Risk: • Yes, but natural hazard risk management and normal safe operating procedures will need consideration. Master Planning: • Allows people to slow the journey.
Sub-idea 4.4: **Create a super track head at the Divide.** **Note: This location was later changed to Lake Marion car park as additional geotechnical and hazard data was completed and made available by the Department of Conservation. Walking tracks off the Divide were found to carry an unacceptable risk.**	This would involve the creation of a single main walking / observation hub in a location along the Divide. A super track head would provide cultural interpretation, parking, shelter, toilets, observation points and access to multiple short and long walking/cycling trails (but not accommodation). This would require the creation of new tracks and connections.	Many DoC tracks have grown in popularity over the past ten years, in some locations dramatically. For example, use of the Lower Lake Marian Track section has grown by around 250% (>30,000 visitors) in the last 5 years (pre 2020), with most of this being in the last 2 years (pre 2020). Data show good tracks in key locations are in demand from short stop, half-day and day walkers. There is probably an undersupply of shorter walks in the local area. Enhanced trailhead capacity and connections at the Divide can centrally service access to several significant walking network opportunities in the area (e.g., Routeburn, Greenstone/Caples, Key Summit (and beyond), the Upper Hollyford Valley, and the Hollyford Track - subject to Hollyford Road status). It would centralise site hardening to one main location (helping to avoid a network of trailhead 'car parks'). It could also facilitate a more streamlined and attractive Hop-on/Hop-off bus system. (Refer Transport & Access workstream report.) A super track head would potentially elevate the standing of the park's short and day walks (making them more	Conservation: • Puts recreation/appreciation of environment at forefront of visitor experience. Opportunity to provide information/ education in highly visible area. • Creation of walking tracks, while relatively low impact compared to other infrastructure, does have ecological effects that will need to be considered. This is especially the case where tracks are built for high use and all-abilities (wider tracks, more bridges, more earthworks). • Existing narrow carpark area is highly modified and could be redeveloped with relatively minor ecological impact. But modified area is very small and constrained by topography, lake, intact vegetation. Cultural Values & Aspirations: • In keeping with manawhenua aspirations for whanau and manuhiri in Piopiotahi if well considered and curated. Transport & Access: • Obvious point for access to various tracks. Could be a key stop in a managed access model. • If car access allowed at this point, could create demand for a significantly sized parking area which would not necessarily fit well in its context. Would work much better under a managed access rather than an unrestricted access model. Land Analysis: • Needs to be located in an appropriate location - supportive if done well; avoid clutter and sprawling development; locate within a cluster

Item	Description	Rationale	Other workstream comments
		family friendly) and would increase visit stay durations in the local area. The consultation survey found that only 23% of respondents favoured the status quo in terms of Milford Road Visitor Sites/Activities. The majority (75%) favoured either improved current (31%) or new (31%) site/activity options.	of development against landform backdrop, minimising effect on openness; use vegetation for screening. Hazards & Visitor Risk: • Yes, but natural hazard risk management and normal safe operating procedures will need consideration. Master Planning: • Ideal nodal point for Hollyford, Greenstone, Eglinton Valleys and associated (great) walks. Potential for last major experience hub before dropping into West Coast and alpine areas where terrain and road vulnerabilities become more difficult. Access to dramatic views down Hollyford Valley. Potential to integrate and reference Ara Tawhito / traditional trails and old bullock / stock routes that linked between Hollyford and Greenstone Valleys. • New link tracks could be constrained by terrain. May need to establish clearing in bush to accommodate centralised trail head in combination with Hollyford Valley viewshaft.
Sub-idea 4.5: **Additional tracks and cycle connections.**	A range of quality tracks and cycling paths in key locations along the corridor (e.g., linking with campgrounds and hubs).	Tracks and cycle paths can be created to link accommodation hubs and sites together to elevate the corridor experience and limit reliance on private vehicles and hop-on/hop-off buses. We need to develop a mix of high-quality shorter tracks to complement the multi day walking offers. This would enable visitors to home base from the accommodation hubs in or out of the park. For road management purposes we need to make people more independent from cars in the corridor (e.g., to bus, cycle and walk from key accommodation / experience hubs to key attraction sites). Demand for quality walking activities is high (based on DoC data). There is a shortage of quality shorter walks and there are no trail mountain biking opportunities inside the corridor at present.	Conservation: • Red beech forests in the Eglinton are nationally important for several critically threatened species. Construction of a cycleway within forests would have a high level of ecological effect, due to vegetation clearance and earthworks leading to disruption of the intact forest floor understory, mossfields etc. (which are important for forest floor regeneration, and feeding habitat for fauna), damage to tree roots and weakening of adjacent trees. • Construction of cycleways in grassland areas in the Eglinton Valley likely of relatively minor ecological impact. The grassland areas are generally modified by exotic species and support a more limited range of fauna compared to forest habitats. Avoid constructing cycle paths within forested habitats. Transport & Access: • Cycling could be a significant challenge given the narrow 12 metre wide road corridor (unless undertaken on a separated track). Land Analysis:

Item	Description	Rationale	Other workstream comments
		The engagement survey found that only 23% of respondents favoured the status quo in terms of Milford Road Visitor Sites/Activities. The majority (75%) favoured either improved current (31%) or new (31%) site/activity options.	• Needs to be located in an appropriate location - supportive if done well; minimise earthworks and avoid visible cuts and scarring of open slopes. Hazards & Visitor Risk: • Yes, but natural hazard risk management and normal safe operating procedures will need consideration. Master Planning: • Sub-ideas 3.5, 3.6, and 3.7 targeted at different user groups, expands the offering.
Sub-idea 4.6: **Develop series of hop-on-hop-off bus stops along corridor.**	Develop a series of experiential mini-interpretive hubs (key hop-on-hop-off stops). These hubs would offer some shelter with integrated interpretation. They would be supported with outdoor interpretation.	Certain sites could be improved/developed to accommodate activity access to backcountry networks off the Milford Corridor and Eglinton Valley activity sites and convey key information/messages (e.g., fishing, river use, key walking/biking opportunities). These could be aligned to hop-on/hop-off buses (refer Transport & Access workstream report). Basic shelter, information and interpretive facilities could add value to visitor experiences. The consultation survey found that only 25% of respondents favoured the status quo for transport options to sites along the Milford Road. Most (68%) favoured options including hop-on/off services. Complementing this, for transport right through to Milford Sound Piopiotahi most (67%) favoured options including park and ride services (both mostly from Te Anau).	Conservation: • Opportunity to provide a range of high-quality interpretation signage/education facilities that explain conservation values, threats, and management in a range of habitats and locations. • Spreads visitor disturbance. Cultural values & aspirations: • In keeping with manawhenua aspirations for whanau and manuhiri in Piopiotahi if well considered and curated. Manawhenua are interested in sensitive, sustainable development/redevelopment that does not take away from the environment but adds to it. Transport & Access: • Helps create a more immersive experience on the road. • Supported but noting that narratives need to be authentic - not forced. Land Analysis: • Needs to be located in an appropriate location - supportive if done well; avoid clutter and sprawling development; cluster development against landform backdrop, minimising effect on openness; use vegetation for screening. Do not obstruct key viewshafts from the road. Hazards & Visitor Risk: • Yes, but natural hazard risk management and normal safe operating procedures will need consideration. Master Planning: • Sub-ideas 3.5, 3.6, and 3.7 targeted at different user groups, expands the offering.

Item	Description	Rationale	Other workstream comments
Sub-idea 4.7: **Develop series of short stop options along corridor.**	Develop a series of short stops catering for organised bus tours with bus parking, loop tracks (of various lengths), interpretation and observation structures, including Mirror Lakes, Lake Gunn etc. Could include a visitor information stop at the Homer Tunnel's eastern or western portal where stories of the Homer Tunnel can be told.	Certain sites offering key visitor experience and interpretation opportunities should be developed to accommodate short stop visitation. These could be incorporated into tour bus schedules and hop-on/hop-off bus service options (refer Transport & Access workstream report). These sites should be optimised for 10-20 minute stops so as to maximise short stop visitor satisfaction and reduced perceived crowding. The consultation survey found that only 23% of respondents favoured the status quo in terms of Milford Road Visitor Sites/Activities. The majority (75%) favoured either improved current (31%) or new (31%) site/activity options.	Conservation: • Creation of walking tracks, while relatively low impact compared to other infrastructure, does have ecological effects that will need to be considered. Avoid effects on high ecological values e.g., wetland / shrublands at Mirror Lakes. Cultural Values & Aspirations: • In keeping with manawhenua aspirations for whanau and manuhiri in Piopiotahi if well considered and curated. Manawhenua are interested in sensitive, sustainable development/redevelopment that does not take away from the environment but adds to it. Transport & Access: • Appears to require significant bus parking footprint. Would work much better under a managed access rather than an organised coach tour type model. • A Homer Tunnel stop in the vicinity of the current eastern portal parking area (or on the western side) would be a key location for stop on the way if this can be done safely given the rockfall and resilience issues around the tunnel. Land Analysis: • Needs to be located in an appropriate location - supportive if done well. Hazards & Visitor Risk: • Yes, but natural hazard risk management and normal safe operating procedures will need consideration. Master Planning: • Sub-ideas 3.5, 3.6, and 3.7 targeted at different user groups, expands the offering.
Sub-idea 4.8: **Enhance Cascade Creek campsite.**	Expand and improve the accommodation offering at Cascade Creek (more associated with landscaping elements given flooding risks). The most developed site should be Knobs Flat (given it is already	Use of DOC campgrounds in the Milford Corridor has increased rapidly in recent years. Annual combined use of the 8 DOC Conservation Campsites between Te Anau and Milford Sound in 2018-2019 was 400% (45,000) higher than in 2013-2014. This suggests that significant latent demand exists for accommodation options in the corridor.	Conservation: • Consolidates disturbance in one location. • Indirect effects of noise, lighting, pollution etc. on threatened forest species (bats, kaka, mohua) in nearby habitats would need to be carefully managed. • Existing large area is highly modified and could be redeveloped with relatively minor ecological impact. Cultural Values & Aspirations:

Item	Description	Rationale	Other workstream comments
	highly modified). Other sites such as Cascades Creek are better aligned with just camper/tent sites.	Cascade Creek is a logical campsite hub area due to size, location and proximity to other activity options (e.g., Lake Gunn track, Eglinton River, the Divide, Hut/Mistake Creeks etc). Expanding the usage of this site would help to grow the corridor as a family friendly destination and take some accommodation pressure off Piopiotahi. It would also help to enable early morning access into Piopiotahi (and potentially extend some evening activities). The consultation survey found that only 30% of respondents favoured the status quo in terms of Milford Road Visitor accommodation options. The majority (62%) favoured either improved current options (45%) or new (17%) options. In terms of activity options along the Milford Road most (75%) preferred new (44%) or at least improved current (31%) options.	• In keeping with manawhenua aspirations for whanau and manuhiri in Piopiotahi. Manawhenua are interested in sensitive, sustainable development/redevelopment that does not take away from the environment but adds to it. Hazards & Visitor Risk: • Yes, but natural hazard risk management and normal safe operating procedures will need consideration, especially landscaping to have some terraced levels higher/safer from river flooding and flood warnings in place. Land Analysis: • Needs to be located in an appropriate location - supportive if done well; avoid clutter and sprawling development; locate within or close to existing cluster of development, minimising effect on openness; use vegetation for screening from surrounding viewpoints and between campsites for privacy. Master Planning: • Allows people to slow the journey. Offers a range of accommodation typologies for all budgets.
Sub-idea 4.9: **Investigate options in the Hollyford Valley.**	Potential recreation/tourism opportunities in the Hollyford Valley could be considered as complementary to options along corridor.	Would increase depth and range of visitor experiences, contributing to potentially more and/or longer visitor stays in the region. Some options could align with a trailhead hub around the Divide. The consultation survey found that only 23% of respondents favoured the status quo in terms of Milford Road Visitor Sites/Activities. The majority (75%) favoured either improved current (31%) or new (31%) site activity options. Current options are constrained by significant flood damage/loss of road access, but longer-term options may be investigated.	Conservation: Conservation: • Expands visitor impacts across wider area. • Insufficient detail to comment with certainty. Conservation workstream has mapped existing modified areas in the lower Hollyford which are most suitable for any new developments. Threatened fauna and ecologically important forests and wetlands present throughout. Cultural Values & Aspirations: • In keeping with manawhenua aspirations for whanau and manuhiri in Piopiotahi. Manawhenua are interested in sensitive, sustainable development/redevelopment that does not take away from the environment but adds to it. Land Analysis: • Hollyford Valley is a largely unmodified part of the park and any development needs to be considered carefully in terms of landscape effects. Hazards & Visitor Risk:

Item	Description	Rationale	Other workstream comments
			• Yes, but natural hazard risk management and normal safe operating procedures will need consideration. Quite significant landslide risks depending on location/s. Master Planning: • Potential to create linkages to wider network.

LONG LIST IDEAS - TE ANAU & SURROUNDS

Table 34: Long List ideas: Te Anau & Surrounds

Item	Description	Rationale	Other workstream comments
Main idea 5: **Develop Te Anau as a sub-regional visitor hub.**	Develop visitor infrastructure in Te Anau that enables it to become the principle departure hub for Fiordland as well as a destination in its own right.	A range of half-day and day experiences need to be created that wrap around Te Anau/Manapouri to strengthen its position as the pre-eminent accommodation and activity hub for Fiordland. The longer visitors can be encouraged to stay the better the economic multipliers will be in a location that is best equipped to accommodate them. Clustering transport, accommodation, activity access, and information/interpretation services into more of a hub role for Te Anau would assist creating stronger synergies between them all and greater critical mass for generating growth and longer stays. With respect to transport options to Milford Road sites and through to Milford Sound Piopiotahi, the consultation survey found that 43% of respondents favoured Park and Ride options based at Te Anau, while separately hop-on/off services (most likely also based at Te Anau) were favoured by most (78%) for Corridor Site access. This points to a hub role for Te Anau. Strongly growing day-use of sites such as Brod Bay indicate demand where opportunities are made accessible. Other similar opportunities can be investigated near Te Anau (for example Hidden Lakes).	Conservation: • Development of large infrastructure assets outside the native habitats in FNP generally a far better option in terms of ecological effect. Cultural Values & Aspirations: • In keeping with manawhenua aspirations for whanau and manuhiri in Piopiotahi. Manawhenua are interested in sensitive, sustainable development/redevelopment that does not take away from the environment but adds to it. Te Anau Basin Study: • Local economic development is a positive. • There is greater development potential in Te Anau (less constrained by Fiordland National Park Management Plan). • Investment will encourage more businesses to support the increased visitor population and this may in-turn support longer season shoulders for locals looking for local entertainment options. • Investment in facilities will support greater capability building in relation to civil Defence and emergency response (e.g., Building local search and rescue capacity / multi use building). • The various community driven facilities, including museums, local 'rainy day' businesses (e.g., mini putt golf and cinema) and visitor centres should be included as part of the diverse offering. The community sense of place should grow with the international reputation. Te Anau doesn't want to just be a bus stop. It wants to contribute to a positive visitor experience and to help contribute to sustainable/conservation outcomes for the environment. • There is a small faction within the community who do not want more tourism development.

Item	Description	Rationale	Other workstream comments
Sub-idea 5.1: **Develop a Fiordland National Park visitor centre in Te Anau.**	Develop a Fiordland National Park visitor orientation / interpretation centre / Conservation HQ in Te Anau that prepares and filters visitors and sets the visitor narrative. The visitor centre would be centred in Te Anau with potential for satellites at Te Anau Downs, Piopiotahi and other connected locations in the region.	Te Anau is an obvious location for a gateway hub into Fiordland and Western Southland. Creating an orientation / interpretation hub in Te Anau will assist in developing a cohesive visitor narrative prior to people entering the National Park. The strength of this offer will be greatly enhanced if it is integrated with a central transport hub (refer Transport & Access workstream report). Clustering transport, accommodation, activity access, and information / interpretation services into more of a hub role for Te Anau would assist in creating stronger synergies between them all and greater critical mass for generating growth and longer stays. This would also assist in developing and enhancing a cohesive visitor narrative prior to people coming to Te Anau/Manapouri and/or entering the National Park. It can also be integrated into an information activity and service network for wider visitors to Murihiku Southland.	Conservation: • Development of large infrastructure assets outside the native habitats in FNP generally a far better option in terms of ecological effect. Conservation: • Educational facilities / Conservation HQ highest priority for conservation after predator control. A 'Conservation HQ' would likely have benefits in terms of promoting conservation and connection to landscape. • Benefits of providing conservation experiences to those unable to experience them in the outdoors (ability / weather). Able to educate visitors about the importance of conservation management. Significant opportunity to re-invest visitor income into conservation. • A previous proposal for Conservation HQ has undergone a high-level ecological impact assessment process. Areas of modified habitat suitable for such a development are available. Cultural Values & Aspirations: • In keeping with manawhenua aspirations for whanau and manuhiri in Piopiotahi if well considered and curated but does not represent the cultural narrative of the place. Transport & Access: • Could be a good base for a bus focused operation to Piopiotahi. Te Anau Basin Study: • Local economic development is a positive. • There is greater development potential in Te Anau (less constrained by Fiordland National Park Management Plan). • Investment will encourage more businesses to support the increased visitor population and this may in-turn support longer season shoulders for locals looking for local entertainment options. • Investment in facilities will support greater capability building in relation to civil Defence and emergency response (e.g., Building local search and rescue capacity / multi use building). • The various community driven facilities, including museums, local 'rainy day' businesses (e.g., mini putt golf and cinema) and visitor centres should be included as part of the diverse offering. The community sense of place should grow with the international reputation. Te Anau doesn't want to just be a bus stop. It wants to

Item	Description	Rationale	Other workstream comments
			contribute to a positive visitor experience and to help contribute to sustainable/conservation outcomes for the environment. • There is a small faction within the community who do not want more tourism development. Master Planning: • Sets the scene for visitors, builds suspense for the journey. • At start of 'dead end' access to corridor and Milford / Piopiotahi. A central place where State Highway meets FNP with ability to access edge of Park in north or south direction. Only major town along FNP edge with supporting airport and lake links. Location of DOC HQ for visitors and operations. • Need to manage bypass opportunities around the town or diversion via Manapouri. Arrival experience needs to be improved. Character of town does not closely reflect this relationship. • Close to visitor and local population with volunteer and staff accommodation options. Potential to function as a 'conservation anchor' for town. Other satellite stations could focus on different and complementary land and marine ecosystems. Could be part of revegetating lakeside to connect town with FNP. • Would need to recreate habitat context in modified urban / rural areas. Extent of grounds and diversity of habitat potentially restricted by available land. • Potential to use Te Anau Downs as a pest free 'island' to release those from breeding programme. Lake Henry to be investigated as a focal point for HQ. Potential to integrate with Ngai Tahu Cultural Centre. • Access to Hidden Lakes is flat and accessible for most visitors with options for higher level viewpoints through open bush (if clearing re-established). Access to Kepler Track close by and could be linked directly into town. • Manapouri potentially closer for walking and cycling connections to nature. More reliant on boat access to nature, but potentially more convenient if available.
Sub-idea 5.2: **Develop a transport hub/bus interchange in Te Anau.**	A base for most travel to Milford Sound Piopiotahi, potentially part of wider options for Express bus services (minimal stops), Park and Ride services, Hop-on/off options servicing Corridor sites etc. Aligned / co-	The creation of a central transport hub serving the corridor and Piopiotahi would assist in cementing Te Anau (and surrounds) as the pre-eminent accommodation hub for Milford Sound. It would also support enhancing Te Anau's role as an activity hub and gateway to Fiordland. The engagement survey found that only 25% of respondents favoured the	Conservation: • This should be integrated with the central hub as the Te Anau entry point to the national park. Te Anau Basin Study: • Reduce impact on the environment. • Allow greater control of vehicle movements and therefore alignment with activity scheduling changes.

Item	Description	Rationale	Other workstream comments
	located with Te Anau accommodation and activity hub opportunities.	status quo access model to Milford Sound Piopiotahi (no park and ride, unrestricted vehicle access). Most (67%) favoured options including park and ride services, with most of these (43%) favouring a Te Anau base.	• Te Anau is well placed to meet regulatory requirements as well as provide amenity and show case alternative journey information and services (such as Doubtful Sound). • Queenstown may lose some visitor nights. • We have received an unsolicited offer to establish such a facility on vacant land on the outskirts of town. Master Planning: • Logical point for beginning of the journey with ability to walk from hotels and hospitality to reduce car dependency and infrastructure. • Risk of bringing additional traffic and car parking through town centre or along lake edge. Potential for poor legibility if visually separated from State Highway. • Remote 'portal' into Fiordland National Park (similar to airport check in with distant links to airside retail / lounges / gates). Opportunity to combine with boat jetties to enhance interchange capability as node within a network. Could also locate regional coach terminal here to manage connections with more distant origins / destinations.
Sub-idea 5.3: **Develop a cultural Performance and Entertainment Centre in Te Anau.**	Cultural Performance and Entertainment Centre part of a new network of visitor centres where tourism businesses can co-locate and enhance the immersive experience.	Would need to be developed in alignment with wider interpretive direction. Would require consultation and research to develop and would need care to be appropriate and authentic. KEY: This must be manawhenua initiated and driven (or not done at all). The tourism workstream believes this is unlikely to be viable and manawhenua aspiration would be better achieved through other mechanisms.	Cultural Values & Aspirations: • Has not been discussed by manawhenua and would need further investigation if taken to next stage. • Concerns it would be a plastic/token experience, owned and operated by others. Commercialisation of the Ngai Tahu story.
Sub-idea 5.4: **Redesign the Te Anau waterfront/CBD.**	Redesign the Te Anau waterfront to make more of the vistas and water access (potentially by creating a combined precinct / hub with a transport facility, orientation /	More can be made of the Te Anau waterfront (the CBD tends to turn its back on the lakefront). In addition, clustering transport, accommodation, activity access, and information / interpretation services into more of a hub role for Te Anau would assist creating stronger synergies between	Conservation: • Waterfront immediately around the town is modified and does not provide high quality lakeshore habitat for native species compared to other lakeshore areas. Sensitivity is needed in other areas of lakeshore where substantial populations of at risk and threatened plants occur. • From the Upukerora to Boundary Creek lakeshore vegetation is largely regenerating indigenous forest / scrub with some exotic weeds. Some

Item	Description	Rationale	Other workstream comments
	interpretation centre, wharfs, hot pools). Note that a number of thoughts regarding lakefront and CBD upkeep/ development were provided in Phase 1 of the Milford Opportunities Project. These included: • Planting • Enhancing the front country of the lake • Toilets at the top end of town • Boat harbour development • Improvement of toilets at the boat harbour • Rubbish bins/recycling • Relocation of the dump station at the boat harbour • Parking provision around town e.g., lakefront • BBQ – Steamer's beach	them all and greater critical mass for generating growth and longer stays. Parking: Need to give careful thought to impact on locals however (social license). The lake is a significant asset to Te Anau and the wider area's recreational opportunities. It appears under-utilised.	developments may be appropriate in modified areas, but the forest / scrub has ecological value. • Support planting. Te Anau township is largely covered in exotic or haphazardly planted native species with little high-quality habitat for native fauna. Opportunity to create habitat and enhance native fauna populations. Conservation: • Rubbish bins have the potential to create issues with vermin and kea and would need to be both rodent / kea proof and emptied regularly or else they may create more problems than they solve. • Regrading relocation of dump station: To where? Likely a benefit if relocated further from FNP. • Regarding boat harbour development: Lakeshore habitats in this area support a range of at risk and threatened plant species. Any developments would need to carefully avoid or manage effects on existing lakeshore vegetation. Cultural Values & Aspirations: • In keeping with manawhenua aspirations for whanau and manuhiri in Piopiotahi if well considered and curated. Manawhenua are interested in sensitive, sustainable development/redevelopment that does not take away from the environment but adds to it. • Regarding relocation of dump station at boat harbour: discharge to water or heightened risk of accidental discharge/contamination of water. Transport & Access: • Key to this is a strong walking and cycling spine with adequate width on the waterfront to encourage people to park at their accommodation and walk/ cycle around town and to access buses to Piopiotahi. • Regarding parking provision around lakefront: Vehicular dominance and potential to block key views of the lake. Cars should be a recessive, not dominant feature in Te Anau. • As part of the Te Anau Masterplan we should be aiming to create a place where walking, cycling, or scooting are the obvious ways to get around with parking focused on accommodation and town centre retail. Te Anau Basin Study: • The lakefront is currently car dominated and under-utilised. The town centre does not engage at all with the lake and the lakefront is dominated by a few operators, notably with Wharf facilities.

Item	Description	Rationale	Other workstream comments
			• Plenty of available road space to repurpose and there is development potential to integrate other ideas into this new space (such as lakefront hot pool, outdoor dining opportunities, etc.). • Lakefront parking will need to be changed and this may upset local residents. • The Community Board are considering commissioning a masterplan investigation. • Regarding enhancing front country of the lake: Fiordland National Park Management Plan often restricts activities. • Regarding improvement of toilets at boat harbour: Note this is already scheduled in the council's asset management plan. • Regarding boat harbour development: The existing jetties are aging and do not provide much public access to the lakefront. Fiordland National Park Management Plan often restricts activities. • Regarding BBQ at Steamer's Beach: Along the proposed route of the Lake2Lake Trail would contribute to a growing network of public BBQ. But note fire hazard and on-going maintenance. Land Analysis: • Comprehensive design required to avoid adverse effects from buildings on waterfront. Master Planning: • Te Anau landscape and urban context not as dramatic as Queenstown. Less heritage buildings that add to the character of the town. Southwest orientation of the town to lake edge is harder to activate and hold visitors at lakeside outdoor dining establishments. Potential for the lake to get rough and fog.
Sub-idea 5.5: **Develop new hotel site(s).**	Any new accommodation would require feasibility assessment. Note: Tourism workstream believes the accommodation operators will decide when and if additional accommodation is required. This is not considered a core part of the existing project.	Would support Te Anau visitor hub. Can be considered in any future master planning of the town.	Te Anau Basin Study: • Hotel chains are already heavily invested in Queenstown/Frankton. • Staffing issues more acute in Te Anau than they are in Queenstown.

Item	Description	Rationale	Other workstream comments
Sub-idea 5.6: **Develop lakefront hot pools in Te Anau.**	Develop a high-quality hot pools / spa experience on the Te Anau waterfront.	Te Anau lacks evening activities and would benefit from a targeted innovative initiative such as a lakeside hot pool and spa experience which aligns well with recuperation after an active day. It would also work as a year-round attraction / activity.	Cultural Values & Aspirations: • Manawhenua are interested in sensitive, sustainable development/redevelopment that does not take away from the environment but adds to it. Land Analysis: • Comprehensive design required to avoid adverse effects from buildings on waterfront. Master planning: • Could entice visitors to overnight in Te Anau.
Sub-idea 5.7: **Develop staff accommodation in Te Anau.**	Luxmore subdivision to be progressed with new worker accommodation and affordable housing options in partnership with a housing developer. A new nohonga site in Te Anau to support Ngai Tahu temporary workers to have accommodation options.	Would be an essential requirement supporting Te Anau as an accommodation, transport, activity hub.	Cultural Values & Aspirations: • This has not been discussed with manawhenua and would need further investigation. NTCSA nohoanga have specific conditions. This would be a different type of nohoanga. • Manawhenua are interested in sensitive, sustainable development/redevelopment that does not take away from the environment but adds to it. Transport & Access: • Worker accommodation a key issue in resort communities. • If there were public transport-focused managed access, this would generate substantial new jobs for Te Anau and the requirement for worker accommodation. Te Anau Basin Study: • Accommodation options are very limited. Some businesses provide accommodation as part of their benefits package. • Note Luxmore Subdivision is currently in the Fiordland Community Board Economic Action Plan.
Main idea 6: **Expand the visitor offering around Te Anau to extend the visitor network.**	Expand surrounding experiences:: • loop tracks • interpretation • observation points / towers • new activity opportunities and connections around	A range of visitor experiences need to be enhanced and/or created that wrap around Te Anau and Manapouri to strengthen their position as the pre-eminent joint activity and access hubs for Fiordland. The longer visitors can be encouraged to stay in the region the better the economic multipliers will be.	Conservation: • Benefits of consolidating visitor impacts within Milford corridor vs. spreading more broadly. The relatively low ecological impacts of small structures, tracks, etc. may be acceptable depending on specific locations. Generally, the experiences proposed are likely to have lower impacts on conservation values. However, habitats e.g., on forests / shorelines around Lake Manapouri are of equally high ecological value to habitats along Milford corridor and similar general concerns apply. Te Anau Basin Study:

Item	Description	Rationale	Other workstream comments
	the lakes and/or south of Manapouri • Integrated lake tours and shoreline tracks and experiences • family focused campsites / huts (integrated with half day walks) • cycle trails	Lake-based and backcountry road-based activities provide opportunities for unique visitor experiences. The engagement survey found that only 23% of respondents favoured the status quo in terms of Milford Road Visitor Sites/Activities. The majority (75%) favoured either improved current (31%) or new (31%) site/activity options. This desire is likely to also apply to sites around Te Anau/Manapouri.	• Plenty of community enthusiasm to see these projects and many previous attempts have been made, making it fertile land for revisiting community-driven initiatives. • Fiordland National Park Management Plan often restricts activities. Master Planning: • Ability to link experiences and various travel modes spatially together into a wider network. Enhanced access into Fiordland National Park with opportunities to link up lake arms to access deeper into the Park. Southern end of Lake Te Anau can be used as an orientation feature with clear views back towards the town. Waiau provides an alternative link to Manapouri off the State Highway. Proximity to Murchison Range for connections with Takahe conservation. Te Anau Airport could be used to support a growing hub. • Could consider re-routing State Highway through Manapouri or to create a scenic loop and / or lengthen the corridor.
Sub-idea 6.1: **Create new walking/cycling tracks.**	Develop new walking/cycling tracks, including lake-based experiences.	Demand for quality walking activities is high (based on DOC data). It is likely that well-considered cycling options would have potential to be key assets (may require a cycle strategy approach). Cycle and trail resource development often has strong community engagement. The new community led Lake2Lake trail near Te Anau is a good example. As are local mountain biking areas. Specific investigation would be required to determine likely visitor experience value and cost benefit.	Conservation: • Creation of walking tracks, while relatively low impact compared to other infrastructure, does have ecological effects that will need to be considered. Cultural Values & Aspirations: • More information needed. Impacts on cultural sites and archaeology. Hazards & Visitor Risk: • We have not done site-specific assessment down to individual track level. DOC may have some ideas in terms of maintenance regime and costs to maintain in safe usable state.
Sub-idea 6.1.1: **Develop the connected path from Te Anau to Milford Piopiotahi.**	Develop the connected path from Te Anau to Milford Piopiotahi.	Specific investigation would be required to determine likely visitor experience value. Currently would seem unlikely option in terms of cost-benefit.	Cultural Values & Aspirations: • More information needed. Impacts on cultural sites and archaeology. Transport & Access: • Very challenging to provide more space within the national park as the road corridor outside the national park is only 12 metres wide. But easier to implement to Te Anau Downs and possible as far as the national park boundary. Land Analysis:

Item	Description	Rationale	Other workstream comments
			• Where would the path be? Will be kept within the road corridor? Landscape effects need to be considered.
Sub-idea 6.1.2: **Linking the Lake2Lake trail along the lakefront to the boat harbour and along to the Upukerora river.**		This would tie into wider hub roles for Te Anau/Manapouri. The engagement survey found that only 23% of respondents favoured the status quo in terms of Milford Road Visitor Sites/Activities. The majority (75%) favoured either improved current (31%) or new (31%) site/activity options. This desire is also likely to apply to sites around Te Anau/Manapouri.	• Conservation:Likely to require a very high level of vegetation clearance and impact to terrestrial habitats across a very large area. High ecological values present (primary forest, regionally significant wetlands). Potentially very high level of impact depending on route. Transport & Access: • Key move would be to complete the Lake2Lake cycleway, plugging the gap to Manapouri and building the cycleway to Te Anau Downs. Could work with a ferry service including Te Anau Downs on the lake.
Sub-idea 6.1.3: **Create new track - loop from Manapouri to Lake Rakatu to Waiau River via Back Valley.**	Use existing track but provide bridge at Pearl Harbour and across Waiau River -- could cater for cyclists.	Backcountry day-walk opportunity very close to Manapouri. Specific investigation would be required to determine likely visitor experience value and cost-benefit.	Conservation: • Area contains large numbers of deer, possums etc. and would benefit greatly from pest control in association with improved track infrastructure. • Back Valley contains nationally important populations of a range of At Risk and Threatened plant species but impacts to these plants could be avoided through track design. • Existing track and hut infrastructure which could be upgraded for a greater number of walkers with generally minor ecological impact. Cycleway infrastructure would have much greater impact. Land Analysis: • Accessible loop, wetlands and tracks in Waiau Valley can be incorporated, provides access for pest control in Back Valley as well.
Sub-idea 6.1.4: **Improve Tutoko Valley Track.**	Make track suitable for all users with lookout where track currently stops -- great views of Mt Tutoko and valley.	Backcountry valley short walk/day walk opportunity very close to Milford Sound Piopiotahi. Specific investigation would be required to determine likely visitor experience value and cost-benefit.	Conservation: • Would provide potential to enhance predator trapping and highlight the area's natural beauty. Opportunity to incorporate story of the last mainland kakapo (some of which were found in this valley). • Existing track could be upgraded with some ecological impact (dense understory, many tree roots and mud, would likely require more vegetation clearance than Ref ID 161). Would require expanded parking area and likely clearance of mature forest trees. • Walking tracks generally low impact compared to other infrastructure development. Would be relatively long for a walk without huts / shelters.

Item	Description	Rationale	Other workstream comments
			Cultural Values & Aspirations: • Needs further investigation with manawhenua if progressed. Land Analysis: • Easy upgrade of track is possible without adverse landscape or ecological impacts.
Sub-idea 6.1.5: **Provide walking track at Monkey Creek.**	Short stop track near road to experience alpine vegetation and views to surrounding mountains.	Already a popular short stop. Potential for longer experience. Close to significant existing walking opportunities (e.g., Gertrude Valley) that are more attractive. Specific investigation would be required to determine likely visitor experience value.	Conservation: • Walking tracks generally low impact but should be designed to discourage straying from the track - likely high conservation value lizard species in alpine areas. • Non-conservation comment - may lack wow factor of Lake Marion or Gertrude Saddle, very shady confined valley. Land Analysis: • Good view, already popular stopping area along Milford Road.
Sus-idea 6.1.6: **Lake Marion track upgrade.**	Improve track to make it accessible to wider user group. Add additional loops to key sites (such as waterfall).	Already well-used. Upper section enhancements would increase longer-stay (day) opportunities. The engagement survey found that only 23% of respondents favoured the status quo in terms of Milford Road Visitor Sites/Activities. The majority (75%) favoured either improved current (31%) or new (31%) site/activity options. Specific investigation would be required to determine likely visitor experience value, cost/benefit etc.	Conservation: • Already a highly developed track, particularly the lower section to the lookout 'gantry'. Steep terrain likely to constrain ever making the track suitable for wider (all ability) use. Land Analysis: • Accessible alpine lake with impressive views; existing track is rough and limits user groups.
Sub-idea 6.1.7: **Key Summit extension of trail along ridge.**	Connect existing track to Key Summit to Greenstone River to form loop. Potentially link back along ridgeline to Cascade Creek.	Potential development of enhanced new backcountry tramping network opportunity off the Milford Corridor (connecting to wider recreation areas Greenstone Valley, Livingstone Range etc). The engagement survey found that only 23% of respondents favoured the status quo in terms of Milford Road	Conservation: • Track construction may consolidate visitor impacts and reduce off-track roaming on sensitive turf vegetation. Land Analysis: • Existing track that can be upgraded and ridgeline to the east is already used for off-track access to McKellar Hut.

Item	Description	Rationale	Other workstream comments
		Visitor Sites/Activities. The majority (75%) favoured either improved current (31%) or new (31%) site/activity options. Specific investigation would be required to determine likely visitor experience value, cost/benefit etc.	
Sub-idea 6.1.8: **Upgrade Dusky Track.**	Improve standard of Dusky track to make it more accessible and avoid mud sections; could be a new Great Walk.	Potential for targeted upgrades as part of wider strategy for visitor experience network opportunities development south of Lake Manapouri (toward West Arm Borland Road etc). Such a strategic approach may act to maintain current low levels of development/higher 'wilderness' settings.. Specific investigation would be required to determine likely visitor experience value, cost/benefit etc.	Conservation: • Untested interesting idea - no highly maintained tracks of this length exist in NZ so visitor demand unknown. Track upgrade / more board-walking could mitigate impacts to sensitive vegetation in alpine areas (Lake Roe). • Would require major earthworks and either board-walking or gravelling tens of kilometres. Subject to extreme flooding - resilience issue? Do we want to increase visitor numbers to Dusky Sound? Would have a range of visitor impacts. • Would require major increase in vegetation clearance (track widening), gravel would need to be sourced locally, potential to introduce weeds deep into Fiordland from increased visitor numbers and speed of access. Land Analysis: • Use of existing track with interesting scenery where Lake Hauroko, alpine areas and Dusky Sound can be experienced. Upgrade would compromise remote experience & challenge.
Sub-idea 6.1.9: **Cycleway on Borland Road to West Arm (Grebe Valley).**	Existing low gradient road (with small gap in the road in steep terrain at Percy Saddle).	Represents a significant wilderness-type of cycling opportunity. Parts are used already but could be enhanced. Would be highly unique in the growing inventory of NZ cycle trail opportunities. Added potential considering e-bike possibilities. Potential to extend beyond Grebe Valley/South Arm through Percy Saddle to West Arm Wilmot Road/Doubful Sound. Strong, unique-experience opportunity. Specific investigation would be required to determine likely visitor experience value, cost/benefit etc.	Conservation: • Improve range of visitor experiences in a way that has limited ecological effect. • DOC anticipate minimal issues with increased visitor numbers. Grebe / Borland Area has high biodiversity values, kiwi, kea, bats, mohua etc. with currently no / minimal funding for conservation management. Top of DOC's list (in terms of new areas) if funds available - could be leveraged from visitors. • Existing road footprint and visual impact of transmission lines are potential drawbacks. Hazards & Visitor Risk: • What work is anticipated in addition to existing road/track? Moderate exposure to hazards (e.g., rock/debris).

Item	Description	Rationale	Other workstream comments
Sub-idea 6.2: **Develop new family-friendly campsites.**	Develop new family-friendly campsites in suitable locations.	The engagement survey found that only 30% of respondents favoured the status quo in terms of Milford Road Visitor accommodation options. The majority (62%) favoured either improved current options (45%) or new (17%) options. It is likely the same desire would apply to options in the Te Anau area.	Te Anau Basin Study: • Local camping ground has targeted families recently and Te Anau is becoming recognised as a premium family destination for camping.
Sub-idea 6.3: **Increase utilisation of Doubtful Sound/Patea.**	Increase utilisation of Doubtful Sound/Patea.	Potential for targeted upgrades as part of wider strategy for visitor experience network opportunities development west and south of Lake Manapouri (from West Arm are and down to Borland Road etc). Such a strategic approach may act to maintain current low levels of development/higher 'wilderness' settings. Specific investigation would be required to determine likely visitor experience value, cost/benefit etc.	Conservation: • Would require substantial development over a larger footprint and increase visitor impacts including noise and disturbance. Biosecurity concerns (introduction of marine or terrestrial weeds, pests, etc.) can be somewhat better managed at Piopiotahi (better access for contractors, at one end of the Fiords, pests can only spread south) rather than where incursions occur at Patea (middle of Fiords, can spread north and south). • A particular concern at Patea would be increased disturbance to marine mammals. At present the area hosts a nationally important population of bottlenose dolphin (endangered) and a substantial body of literature has linked an increase in human activity at Patea in recent years to a decline in breeding success for dolphins. • There are merits in concentrating visitor impacts at Piopiotahi rather than spreading impacts between multiple locations. Cultural Values & Aspirations: • Has not been discussed with manawhenua. Would need further investigation. Transport & Access: • Lake2Lake cycleway to Manapouri and possible public transport between Te Anau & Manapouri would support more use of Doubtful Sound. Also, the reopening of tours to Manapouri Power Station would provide a significant new value add to the Patea/Doubtful Sound journey. Te Anau Basin study: • Improved tourism activity in Manapouri will support local economic development. • Local accommodation providers have indicated that many visitors who stay longer enjoy Patea more than Piopiotahi (especially domestic visitors).
Sub-idea 6.4:	Encourage people to travel Southland	Potentially a longer-term focus after viability of Te Anau has been	Conservation:

Item	Description	Rationale	Other workstream comments
Develop/promote the Southland regional route.	regional route. Distribute visitor experiences across the wider region.	established. Would require compelling visitor experiences. Could consider option development around the Borland Road/Monowai area.	• Prefer to consolidate visitor experiences and impacts in a smaller number of well-managed locations. Cultural Values & Aspirations: • In keeping with manawhenua aspirations for whanau and Papatipu Runanga. Transport & Access: • Key to Te Anau focus is to strongly encourage the Southern Scenic Route towards Waihopai/ Invercargill. Te Anau Basin Study: • Good examples of connected journeys elsewhere in NZ, such as Goldfields trail in Central Otago, Twin Coast Discovery in Northland. • Share the benefits of tourism across a wider area.
Sub-idea 6.5: **Develop other experiences to round out the sub-regional offering.**	Specific thoughts regarding potential opportunities include: • Potential Dark Skies application • Local sculpture/artwork sites • Working with Fiordland Museum Trust • An exclusive multi-sport/Adventure sport event in the shoulder season that attracts an international following (like Challenge Wanaka)	Support development of critical mass of experiences, including shoulder-season offering, to attract people to the sub-region.	<u>Potential Dark Skies application:</u> Conservation: • Support idea. Reduced light pollution likely to be of benefit for native bats, invertebrates, nocturnal birds. Cultural Values & Aspirations: • Manawhenua are hesitant about additions to the NP and new applications by DOC than add restrictions. Needs to be a Crown/Iwi discussion. Te Anau Basin study: • It is often cloudy in Fiordland and this would diminish the economic viability. <u>Local sculpture/artwork sites:</u> Cultural Values & Aspirations: • In keeping with manawhenua aspirations for whanau and manuhiri in Piopiotahi if well considered and curated. Manawhenua want the option to decide the visual representation rather than it being specified in the Masterplan. Te Anau Basin Study: • Currently there is little iconic public art and nothing of regional significance. <u>Working with Fiordland Museum Trust:</u> Te Anau Basin study:

Item	Description	Rationale	Other workstream comments
			• The various community driven facilities, including museums, local rainy-day businesses (e.g., Mini Put Golf and Cinema) should be included as part of the diverse offering. The community sense of place should grow with the international reputation. Te Anau doesn't want to just be a bus stop. It wants to contribute to a positive visitor experience and to help contribute to sustainable/conservation outcomes for the environment. <u>Multi-sport events:</u> Conservation: • Compliance issues with previous events in Fiordland and Westland Tai Poutini where equipment caches (for Godzone race) were abandoned in remote areas. Such an activity isn't of major conservation impact in and of itself provided impacts are temporary and appropriate clean-up occurs. Transport & Access: • Events are a key driver of shoulder season visitation. Queenstown is very successful at rounding out its year-round offer with key events - Winter Festival, Queenstown Marathon etc. Te Anau Basin study: • Less dependent on summer -- could provide shoulder season activity. • Leverage NZ's international reputation and local expertise in multi-sport. • Kepler run is already a significant event.

APPENDIX 4: CBA INPUTS

DEMAND SCENARIOS FOR MILFORD SOUND PIOPIOTAHI

This section provides a summary of the demand scenarios used to inform the CBA.

Table 35: Demand profile for Milford Sound Piopiotahi: Status quo

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Total visitors to Milford Sound													
2006	69,996	72,993	66,195	47,366	27,316	15,379	14,578	17,126	23,927	41,724	57,849	58,924	513,374
2007	69,726	74,567	67,981	51,083	27,215	15,737	17,951	19,403	28,694	29,635	59,964	60,244	522,200
2008	73,962	75,129	69,162	48,595	27,914	15,509	17,831	16,555	19,477	38,171	53,161	55,769	511,235
2009	65,692	63,935	59,182	47,103	24,268	13,623	14,961	14,634	25,778	36,898	56,131	61,941	484,145
2010	73,498	71,083	59,645	46,088	26,316	16,462	20,351	19,016	18,711	35,152	55,399	61,358	503,078
2011	71,764	68,345	53,081	40,460	20,315	13,824	10,435	15,712	21,777	27,664	48,349	58,169	449,896
2012	69,055	57,879	53,024	42,853	22,271	12,986	17,496	19,924	17,923	27,656	45,615	50,509	437,191
2013	59,982	65,613	56,924	45,331	19,127	4,012	16,836	20,671	20,861	31,723	52,117	63,717	456,913
2014	72,975	71,647	63,673	50,978	25,255	17,220	19,022	17,773	25,034	37,925	53,456	77,668	532,625
2015	81,214	84,701	76,849	57,644	30,579	15,692	19,978	17,840	32,686	44,179	72,549	94,033	627,944
2016	100,651	95,841	93,669	69,926	39,144	26,021	25,866	28,964	40,375	52,264	85,799	103,164	761,685
2017	109,593	102,320	101,879	81,276	45,833	30,796	33,367	29,112	36,607	66,013	89,787	111,165	837,747
2018	118,831	113,582	109,860	87,937	47,701	30,489	28,842	32,528	35,104	63,588	99,313	115,691	883,466
2019	119,167	113,977	107,903	91,486	45,702	32,659	34,462	28,136	39,026	57,482	86,600	112,040	868,641
2030	124,000	112,000	124,000	110,101	57,607	39,188	40,162	36,948	46,380	75,791	113,983	124,000	1,004,159
2040	124,000	116,000	124,000	120,000	68,045	46,266	47,417	43,655	54,790	89,569	120,000	124,000	1,077,743
2050	124,000	112,000	124,000	120,000	78,773	53,564	54,897	50,536	63,427	103,684	120,000	124,000	1,128,881
2060	124,000	116,000	124,000	120,000	89,838	61,115	62,636	57,619	72,328	118,201	120,000	124,000	1,189,738
2070	124,000	112,000	124,000	120,000	101,296	68,962	70,678	64,936	81,535	124,000	120,000	124,000	1,235,407
Average visitors to Milford Sound per day													
2006	2,258	2,607	2,135	1,579	881	513	470	552	798	1,346	1,928	1,901	1,407
2007	2,249	2,663	2,193	1,703	878	525	579	626	956	956	1,999	1,943	1,431
2008	2,386	2,591	2,231	1,620	900	517	575	534	649	1,231	1,772	1,799	1,397
2009	2,119	2,283	1,909	1,570	783	454	483	472	859	1,190	1,871	1,998	1,326
2010	2,371	2,539	1,924	1,536	849	549	656	613	624	1,134	1,847	1,979	1,378
2011	2,315	2,441	1,712	1,349	655	461	337	507	726	892	1,612	1,876	1,233
2012	2,228	1,996	1,710	1,428	718	433	564	643	597	892	1,520	1,629	1,195
2013	1,935	2,343	1,836	1,511	617	134	543	667	695	1,023	1,737	2,055	1,252
2014	2,354	2,559	2,054	1,699	815	574	614	573	834	1,223	1,782	2,505	1,459
2015	2,620	3,025	2,479	1,921	986	523	644	575	1,090	1,425	2,418	3,033	1,720
2016	3,247	3,305	3,022	2,331	1,263	867	834	934	1,346	1,686	2,860	3,328	2,081
2017	3,535	3,654	3,286	2,709	1,478	1,027	1,076	939	1,220	2,129	2,993	3,586	2,295
2018	3,833	4,057	3,544	2,931	1,539	1,016	930	1,049	1,170	2,051	3,310	3,732	2,420
2019	3,844	4,071	3,481	3,050	1,474	1,089	1,112	908	1,301	1,854	2,887	3,614	2,380
Daily average													
2030	4,000	4,000	4,000	3,670	1,858	1,306	1,296	1,192	1,546	2,445	3,799	4,000	2,751
2040	4,000	4,000	4,000	4,000	2,195	1,542	1,530	1,408	1,826	2,889	4,000	4,000	2,945
2050	4,000	4,000	4,000	4,000	2,541	1,785	1,771	1,630	2,114	3,345	4,000	4,000	3,093
2060	4,000	4,000	4,000	4,000	2,898	2,037	2,021	1,859	2,411	3,813	4,000	4,000	3,251
2070	4,000	4,000	4,000	4,000	3,268	2,299	2,280	2,095	2,718	4,000	4,000	4,000	3,385
Hourly average (8 hour day)													
2030	500	500	500	459	232	163	162	149	193	306	475	500	344
2040	500	500	500	500	274	193	191	176	228	361	500	500	368
2050	500	500	500	500	318	223	221	204	264	418	500	500	387
2060	500	500	500	500	362	255	253	232	301	477	500	500	406
2070	500	500	500	500	408	287	285	262	340	500	500	500	423

Table 36: Demand profile for Milford Sound Piopiotahi: Unconstrained

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Total visitors to Milford Sound													
2006	69,996	72,993	66,195	47,366	27,316	15,379	14,578	17,126	23,927	41,724	57,849	58,924	513,374
2007	69,726	74,567	67,981	51,083	27,215	15,737	17,951	19,403	28,694	29,635	59,964	60,244	522,200
2008	73,962	75,129	69,162	48,595	27,914	15,509	17,831	16,555	19,477	38,171	53,161	55,769	511,235
2009	65,692	63,935	59,182	47,103	24,268	13,623	14,961	14,634	25,778	36,898	56,131	61,941	484,145
2010	73,498	71,083	59,645	46,088	26,316	16,462	20,351	19,016	18,711	35,152	55,399	61,358	503,078
2011	71,764	68,345	53,081	40,460	20,315	13,824	10,435	15,712	21,777	27,664	48,349	58,169	449,896
2012	69,055	57,879	53,024	42,853	22,271	12,986	17,496	19,924	17,923	27,656	45,615	50,509	437,191
2013	59,982	65,613	56,924	45,331	19,127	4,012	16,836	20,671	20,861	31,723	52,117	63,717	456,913
2014	72,975	71,647	63,673	50,978	25,255	17,220	19,022	17,773	25,034	37,925	53,456	77,668	532,625
2015	81,214	84,701	76,849	57,644	30,579	15,692	19,978	17,840	32,686	44,179	72,549	94,033	627,944
2016	100,651	95,841	93,669	69,926	39,144	26,021	25,866	28,964	40,375	52,264	85,799	103,164	761,685
2017	109,593	102,320	101,879	81,276	45,833	30,796	33,367	29,112	36,607	66,013	89,787	111,165	837,747
2018	118,831	113,582	109,860	87,937	47,701	30,489	28,842	32,528	35,104	63,588	99,313	115,691	883,466
2019	119,167	113,977	107,903	91,486	45,702	32,659	34,462	28,136	39,026	57,482	86,600	112,040	868,641
2030	146,204	139,445	133,684	110,101	57,607	39,188	40,162	36,948	46,380	75,791	113,983	141,105	1,080,597
2040	172,797	164,901	157,973	130,078	68,045	46,266	47,417	43,655	54,790	89,569	134,892	166,948	1,277,331
2050	200,022	190,866	182,868	150,580	78,773	53,564	54,897	50,536	63,427	103,684	156,118	193,224	1,478,559
2060	227,978	217,417	208,463	171,687	89,838	61,115	62,636	57,619	72,328	118,201	177,716	220,005	1,685,003
2070	256,782	244,645	234,870	193,495	101,296	68,962	70,678	64,936	81,535	133,183	199,747	247,372	1,897,500
Average visitors to Milford Sound per day													
2006	2,258	2,607	2,135	1,579	881	513	470	552	798	1,346	1,928	1,901	1,407
2007	2,249	2,663	2,193	1,703	878	525	579	626	956	956	1,999	1,943	1,431
2008	2,386	2,591	2,231	1,620	900	517	575	534	649	1,231	1,772	1,799	1,397
2009	2,119	2,283	1,909	1,570	783	454	483	472	859	1,190	1,871	1,998	1,326
2010	2,371	2,539	1,924	1,536	849	549	656	613	624	1,134	1,847	1,979	1,378
2011	2,315	2,441	1,712	1,349	655	461	337	507	726	892	1,612	1,876	1,233
2012	2,228	1,996	1,710	1,428	718	433	564	643	597	892	1,520	1,629	1,195
2013	1,935	2,343	1,836	1,511	617	134	543	667	695	1,023	1,737	2,055	1,252
2014	2,354	2,559	2,054	1,699	815	574	614	573	834	1,223	1,782	2,505	1,459
2015	2,620	3,025	2,479	1,921	986	523	644	575	1,090	1,425	2,418	3,033	1,720
2016	3,247	3,305	3,022	2,331	1,263	867	834	934	1,346	1,686	2,860	3,328	2,081
2017	3,535	3,654	3,286	2,709	1,478	1,027	1,076	939	1,220	2,129	2,993	3,586	2,295
2018	3,833	4,057	3,544	2,931	1,539	1,016	930	1,049	1,170	2,051	3,310	3,732	2,420
2019	3,844	4,071	3,481	3,050	1,474	1,089	1,112	908	1,301	1,854	2,887	3,614	2,380
Daily average													
2030	4,716	4,980	4,312	3,670	1,858	1,306	1,296	1,192	1,546	2,445	3,799	4,552	2,961
2040	5,574	5,686	5,096	4,336	2,195	1,542	1,530	1,408	1,826	2,889	4,496	5,385	3,490
2050	6,452	6,817	5,899	5,019	2,541	1,785	1,771	1,630	2,114	3,345	5,204	6,233	4,051
2060	7,354	7,497	6,725	5,723	2,898	2,037	2,021	1,859	2,411	3,813	5,924	7,097	4,604
2070	8,283	8,737	7,576	6,450	3,268	2,299	2,280	2,095	2,718	4,296	6,658	7,980	5,199
Hourly average (8 hour day)													
2030	590	623	539	459	232	163	162	149	193	306	475	569	370
2040	697	711	637	542	274	193	191	176	228	361	562	673	436
2050	807	852	737	627	318	223	221	204	264	418	650	779	506
2060	919	937	841	715	362	255	253	232	301	477	740	887	575
2070	1,035	1,092	947	806	408	287	285	262	340	537	832	997	650
Peak day (daily average + 30%)													
2030	6,131	6,474	5,606	4,771	2,416	1,698	1,684	1,549	2,010	3,178	4,939	5,917	n/a
2040	7,246	7,392	6,625	5,637	2,853	2,005	1,988	1,831	2,374	3,756	5,845	7,001	n/a
2050	8,388	8,862	7,669	6,525	3,303	2,321	2,302	2,119	2,749	4,348	6,765	8,103	n/a
2060	9,560	9,746	8,742	7,440	3,767	2,648	2,627	2,416	3,134	4,957	7,701	9,226	n/a
2070	10,768	11,359	9,849	8,385	4,248	2,988	2,964	2,723	3,533	5,585	8,656	10,374	n/a
Peak hour (hourly average + 30%)													
2030	766	809	701	596	302	212	211	194	251	397	617	740	n/a
2040	906	924	828	705	357	251	249	229	297	470	731	875	n/a
2050	1,049	1,108	959	816	413	290	288	265	344	544	846	1,013	n/a
2060	1,195	1,218	1,093	930	471	331	328	302	392	620	963	1,153	n/a
2070	1,346	1,420	1,231	1,048	531	374	370	340	442	698	1,082	1,297	n/a

Table 37: Demand profile for Milford Sound Piopiotahi: Preferred option, no access price

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Total visitors to Milford Sound													
2006	69,996	72,993	66,195	47,366	27,316	15,379	14,578	17,126	23,927	41,724	57,849	58,924	513,374
2007	69,726	74,567	67,981	51,083	27,215	15,737	17,951	19,403	28,694	29,635	59,964	60,244	522,200
2008	73,962	75,129	69,162	48,595	27,914	15,509	17,831	16,555	19,477	38,171	53,161	55,769	511,235
2009	65,692	63,935	59,182	47,103	24,268	13,623	14,961	14,634	25,778	36,898	56,131	61,941	484,145
2010	73,498	71,083	59,645	46,088	26,316	16,462	20,351	19,016	18,711	35,152	55,399	61,358	503,078
2011	71,764	68,345	53,081	40,460	20,315	13,824	10,435	15,712	21,777	27,664	48,349	58,169	449,896
2012	69,055	57,879	53,024	42,853	22,271	12,986	17,496	19,924	17,923	27,656	45,615	50,509	437,191
2013	59,982	65,613	56,924	45,331	19,127	4,012	16,836	20,671	20,861	31,723	52,117	63,717	456,913
2014	72,975	71,647	63,673	50,978	25,255	17,220	19,022	17,773	25,034	37,925	53,456	77,668	532,625
2015	81,214	84,701	76,849	57,644	30,579	15,692	19,978	17,840	32,686	44,179	72,549	94,033	627,944
2016	100,651	95,841	93,669	69,926	39,144	26,021	25,866	28,964	40,375	52,264	85,799	103,164	761,685
2017	109,593	102,320	101,879	81,276	45,833	30,796	33,367	29,112	36,607	66,013	89,787	111,165	837,747
2018	118,831	113,582	109,860	87,937	47,701	30,489	28,842	32,528	35,104	63,588	99,313	115,691	883,466
2019	119,167	113,977	107,903	91,486	45,702	32,659	34,462	28,136	39,026	57,482	86,600	112,040	868,641
2030	144,421	136,894	131,597	108,288	56,722	38,203	39,328	36,035	45,414	74,378	112,077	138,421	1,061,778
2040	170,690	161,885	155,507	127,936	67,000	45,103	46,433	42,577	53,648	87,899	132,636	163,773	1,255,087
2050	188,443	169,156	180,013	148,101	77,564	52,217	53,757	49,288	62,105	101,751	153,506	187,141	1,423,043
2060	188,443	175,197	187,791	168,860	88,459	59,579	61,336	56,196	70,820	115,997	174,744	187,141	1,534,563
2070	188,443	169,156	187,790	181,575	99,741	67,228	69,211	63,332	79,836	130,700	181,527	187,141	1,605,681
Average visitors to Milford Sound per day													
2006	2,258	2,607	2,135	1,579	881	513	470	552	798	1,346	1,928	1,901	1,407
2007	2,249	2,663	2,193	1,703	878	525	579	626	956	956	1,999	1,943	1,431
2008	2,386	2,591	2,231	1,620	900	517	575	534	649	1,231	1,772	1,799	1,397
2009	2,119	2,283	1,909	1,570	783	454	483	472	859	1,190	1,871	1,998	1,326
2010	2,371	2,539	1,924	1,536	849	549	656	613	624	1,134	1,847	1,979	1,378
2011	2,315	2,441	1,712	1,349	655	461	337	507	726	892	1,612	1,876	1,233
2012	2,228	1,996	1,710	1,428	718	433	564	643	597	892	1,520	1,629	1,195
2013	1,935	2,343	1,836	1,511	617	134	543	667	695	1,023	1,737	2,055	1,252
2014	2,354	2,559	2,054	1,699	815	574	614	573	834	1,223	1,782	2,505	1,459
2015	2,620	3,025	2,479	1,921	986	523	644	575	1,090	1,425	2,418	3,033	1,720
2016	3,247	3,305	3,022	2,331	1,263	867	834	934	1,346	1,686	2,860	3,328	2,081
2017	3,535	3,654	3,286	2,709	1,478	1,027	1,076	939	1,220	2,129	2,993	3,586	2,295
2018	3,833	4,057	3,544	2,931	1,539	1,016	930	1,049	1,170	2,051	3,310	3,732	2,420
2019	3,844	4,071	3,481	3,050	1,474	1,089	1,112	908	1,301	1,854	2,887	3,614	2,380
Daily average													
2030	4,659	4,889	4,245	3,610	1,830	1,273	1,269	1,162	1,514	2,399	3,736	4,465	2,909
2040	5,506	5,582	5,016	4,265	2,161	1,503	1,498	1,373	1,788	2,835	4,421	5,283	3,429
2050	6,079	6,041	5,807	4,937	2,502	1,741	1,734	1,590	2,070	3,282	5,117	6,037	3,899
2060	6,079	6,041	6,058	5,629	2,854	1,986	1,979	1,813	2,361	3,742	5,825	6,037	4,193
2070	6,079	6,041	6,058	6,053	3,217	2,241	2,233	2,043	2,661	4,216	6,051	6,037	4,399
Hourly average (8 hour day)													
2030	582	611	531	451	229	159	159	145	189	300	467	558	364
2040	688	698	627	533	270	188	187	172	224	354	553	660	429
2050	760	755	726	617	313	218	217	199	259	410	640	755	487
2060	760	755	757	704	357	248	247	227	295	468	728	755	524
2070	760	755	757	757	402	280	279	255	333	527	756	755	550
Peak day (daily average + 30%)													
2030	6,056	6,356	5,519	4,692	2,379	1,655	1,649	1,511	1,968	3,119	4,857	5,805	n/a
2040	7,158	7,257	6,521	5,544	2,810	1,954	1,947	1,785	2,325	3,686	5,748	6,868	n/a
2050	7,902	7,854	7,549	6,418	3,253	2,263	2,254	2,067	2,691	4,267	6,652	7,848	n/a
2060	7,902	7,854	7,875	7,317	3,710	2,582	2,572	2,357	3,069	4,864	7,572	7,848	n/a
2070	7,902	7,854	7,875	7,868	4,183	2,913	2,902	2,656	3,460	5,481	7,866	7,848	n/a
Peak hour (hourly average + 30%)													
2030	757	794	690	587	297	207	206	189	246	390	607	726	n/a
2040	895	907	815	693	351	244	243	223	291	461	718	858	n/a
2050	988	982	944	802	407	283	282	258	336	533	831	981	n/a
2060	988	982	984	915	464	323	322	295	384	608	947	981	n/a
2070	988	982	984	984	523	364	363	332	432	685	983	981	n/a

Table 38: Demand profile for Milford Sound Piopiotahi: Preferred option, $50 access price

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Total visitors to Milford Sound													
2006	69,996	72,993	66,195	47,366	27,316	15,379	14,578	17,126	23,927	41,724	57,849	58,924	513,374
2007	69,726	74,567	67,981	51,083	27,215	15,737	17,951	19,403	28,694	29,635	59,964	60,244	522,200
2008	73,962	75,129	69,162	48,595	27,914	15,509	17,831	16,555	19,477	38,171	53,161	55,769	511,235
2009	65,692	63,935	59,182	47,103	24,268	13,623	14,961	14,634	25,778	36,898	56,131	61,941	484,145
2010	73,498	71,083	59,645	46,088	26,316	16,462	20,351	19,016	18,711	35,152	55,399	61,358	503,078
2011	71,764	68,345	53,081	40,460	20,315	13,824	10,435	15,712	21,777	27,664	48,349	58,169	449,896
2012	69,055	57,879	53,024	42,853	22,271	12,986	17,496	19,924	17,923	27,656	45,615	50,509	437,191
2013	59,982	65,613	56,924	45,331	19,127	4,012	16,836	20,671	20,861	31,723	52,117	63,717	456,913
2014	72,975	71,647	63,673	50,978	25,255	17,220	19,022	17,773	25,034	37,925	53,456	77,668	532,625
2015	81,214	84,701	76,849	57,644	30,579	15,692	19,978	17,840	32,686	44,179	72,549	94,033	627,944
2016	100,651	95,841	93,669	69,926	39,144	26,021	25,866	28,964	40,375	52,264	85,799	103,164	761,685
2017	109,593	102,320	101,879	81,276	45,833	30,796	33,367	29,112	36,607	66,013	89,787	111,165	837,747
2018	118,831	113,582	109,860	87,937	47,701	30,489	28,842	32,528	35,104	63,588	99,313	115,691	883,466
2019	119,167	113,977	107,903	91,486	45,702	32,659	34,462	28,136	39,026	57,482	86,600	112,040	868,641
2030	127,019	119,986	115,956	95,562	50,149	33,939	34,916	31,838	40,148	65,588	97,711	120,931	933,742
2040	150,048	141,829	136,954	112,840	59,203	40,045	41,199	37,598	47,401	77,471	115,594	143,026	1,103,210
2050	173,701	164,172	158,547	130,635	68,542	46,366	47,701	43,528	54,878	89,687	133,790	165,546	1,277,093
2060	188,235	174,900	180,830	149,025	78,214	52,933	54,458	49,654	62,613	102,296	152,352	186,802	1,432,312
2070	188,237	168,871	187,531	168,104	88,271	59,788	61,511	56,009	70,648	115,361	171,339	186,804	1,522,475
Average visitors to Milford Sound per day													
2006	2,258	2,607	2,135	1,579	881	513	470	552	798	1,346	1,928	1,901	1,407
2007	2,249	2,663	2,193	1,703	878	525	579	626	956	956	1,999	1,943	1,431
2008	2,386	2,591	2,231	1,620	900	517	575	534	649	1,231	1,772	1,799	1,397
2009	2,119	2,283	1,909	1,570	783	454	483	472	859	1,190	1,871	1,998	1,326
2010	2,371	2,539	1,924	1,536	849	549	656	613	624	1,134	1,847	1,979	1,378
2011	2,315	2,441	1,712	1,349	655	461	337	507	726	892	1,612	1,876	1,233
2012	2,228	1,996	1,710	1,428	718	433	564	643	597	892	1,520	1,629	1,195
2013	1,935	2,343	1,836	1,511	617	134	543	667	695	1,023	1,737	2,055	1,252
2014	2,354	2,559	2,054	1,699	815	574	614	573	834	1,223	1,782	2,505	1,459
2015	2,620	3,025	2,479	1,921	986	523	644	575	1,090	1,425	2,418	3,033	1,720
2016	3,247	3,305	3,022	2,331	1,263	867	834	934	1,346	1,686	2,860	3,328	2,081
2017	3,535	3,654	3,286	2,709	1,478	1,027	1,076	939	1,220	2,129	2,993	3,586	2,295
2018	3,833	4,057	3,544	2,931	1,539	1,016	930	1,049	1,170	2,051	3,310	3,732	2,420
2019	3,844	4,071	3,481	3,050	1,474	1,089	1,112	908	1,301	1,854	2,887	3,614	2,380
Daily average													
2030	4,097	4,285	3,741	3,185	1,618	1,131	1,126	1,027	1,338	2,116	3,257	3,901	2,558
2040	4,840	4,891	4,418	3,761	1,910	1,335	1,329	1,213	1,580	2,499	3,853	4,614	3,014
2050	5,603	5,863	5,114	4,355	2,211	1,546	1,539	1,404	1,829	2,893	4,460	5,340	3,499
2060	6,072	6,031	5,833	4,967	2,523	1,764	1,757	1,602	2,087	3,300	5,078	6,026	3,913
2070	6,072	6,031	6,049	5,603	2,847	1,993	1,984	1,807	2,355	3,721	5,711	6,026	4,171
Hourly average (8 hour day)													
2030	512	536	468	398	202	141	141	128	167	264	407	488	320
2040	605	611	552	470	239	167	166	152	198	312	482	577	377
2050	700	733	639	544	276	193	192	176	229	362	557	668	437
2060	759	754	729	621	315	221	220	200	261	412	635	753	489
2070	759	754	756	700	356	249	248	226	294	465	714	753	521
Peak day (daily average + 30%)													
2030	5,327	5,571	4,863	4,141	2,103	1,471	1,464	1,335	1,740	2,750	4,234	5,071	n/a
2040	6,292	6,358	5,743	4,890	2,483	1,735	1,728	1,577	2,054	3,249	5,009	5,998	n/a
2050	7,284	7,622	6,649	5,661	2,874	2,009	2,000	1,825	2,378	3,761	5,798	6,942	n/a
2060	7,894	7,840	7,583	6,458	3,280	2,294	2,284	2,082	2,713	4,290	6,602	7,834	n/a
2070	7,894	7,840	7,864	7,285	3,702	2,591	2,579	2,349	3,061	4,838	7,425	7,834	n/a
Peak hour (hourly average + 30%)													
2030	666	696	608	518	263	184	183	167	217	344	529	634	n/a
2040	787	795	718	611	310	217	216	197	257	406	626	750	n/a
2050	911	953	831	708	359	251	250	228	297	470	725	868	n/a
2060	987	980	948	807	410	287	285	260	339	536	825	979	n/a
2070	987	980	983	911	463	324	322	294	383	605	928	979	n/a

Table 39: Demand profile for Milford Sound Piopiotahi: Preferred option, $100 access price

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Total visitors to Milford Sound													
2006	69,996	72,993	66,195	47,366	27,316	15,379	14,578	17,126	23,927	41,724	57,849	58,924	513,374
2007	69,726	74,567	67,981	51,083	27,215	15,737	17,951	19,403	28,694	29,635	59,964	60,244	522,200
2008	73,962	75,129	69,162	48,595	27,914	15,509	17,831	16,555	19,477	38,171	53,161	55,769	511,235
2009	65,692	63,935	59,182	47,103	24,268	13,623	14,961	14,634	25,778	36,898	56,131	61,941	484,145
2010	73,498	71,083	59,645	46,088	26,316	16,462	20,351	19,016	18,711	35,152	55,399	61,358	503,078
2011	71,764	68,345	53,081	40,460	20,315	13,824	10,435	15,712	21,777	27,664	48,349	58,169	449,896
2012	69,055	57,879	53,024	42,853	22,271	12,986	17,496	19,924	17,923	27,656	45,615	50,509	437,191
2013	59,982	65,613	56,924	45,331	19,127	4,012	16,836	20,671	20,861	31,723	52,117	63,717	456,913
2014	72,975	71,647	63,673	50,978	25,255	17,220	19,022	17,773	25,034	37,925	53,456	77,668	532,625
2015	81,214	84,701	76,849	57,644	30,579	15,692	19,978	17,840	32,686	44,179	72,549	94,033	627,944
2016	100,651	95,841	93,669	69,926	39,144	26,021	25,866	28,964	40,375	52,264	85,799	103,164	761,685
2017	109,593	102,320	101,879	81,276	45,833	30,796	33,367	29,112	36,607	66,013	89,787	111,165	837,747
2018	118,831	113,582	109,860	87,937	47,701	30,489	28,842	32,528	35,104	63,588	99,313	115,691	883,466
2019	119,167	113,977	107,903	91,486	45,702	32,659	34,462	28,136	39,026	57,482	86,600	112,040	868,641
2030	109,617	103,078	100,315	82,835	43,576	29,675	30,503	27,641	34,882	56,798	83,345	103,441	805,705
2040	129,406	121,774	118,400	97,744	51,405	34,987	35,964	32,620	41,155	67,044	98,553	122,279	951,332
2050	149,819	140,969	137,081	113,170	59,521	40,514	41,645	37,767	47,651	77,622	114,074	141,542	1,101,375
2060	170,954	160,737	156,452	129,190	67,968	46,288	47,580	43,112	54,405	88,594	129,961	161,300	1,256,541
2070	187,966	168,494	176,621	145,899	76,802	52,349	53,811	48,686	61,459	100,023	146,273	181,633	1,400,016
Average visitors to Milford Sound per day													
2006	2,258	2,607	2,135	1,579	881	513	470	552	798	1,346	1,928	1,901	1,407
2007	2,249	2,663	2,193	1,703	878	525	579	626	956	956	1,999	1,943	1,431
2008	2,386	2,591	2,231	1,620	900	517	575	534	649	1,231	1,772	1,799	1,397
2009	2,119	2,283	1,909	1,570	783	454	483	472	859	1,190	1,871	1,998	1,326
2010	2,371	2,539	1,924	1,536	849	549	656	613	624	1,134	1,847	1,979	1,378
2011	2,315	2,441	1,712	1,349	655	461	337	507	726	892	1,612	1,876	1,233
2012	2,228	1,996	1,710	1,428	718	433	564	643	597	892	1,520	1,629	1,195
2013	1,935	2,343	1,836	1,511	617	134	543	667	695	1,023	1,737	2,055	1,252
2014	2,354	2,559	2,054	1,699	815	574	614	573	834	1,223	1,782	2,505	1,459
2015	2,620	3,025	2,479	1,921	986	523	644	575	1,090	1,425	2,418	3,033	1,720
2016	3,247	3,305	3,022	2,331	1,263	867	834	934	1,346	1,686	2,860	3,328	2,081
2017	3,535	3,654	3,286	2,709	1,478	1,027	1,076	939	1,220	2,129	2,993	3,586	2,295
2018	3,833	4,057	3,544	2,931	1,539	1,016	930	1,049	1,170	2,051	3,310	3,732	2,420
2019	3,844	4,071	3,481	3,050	1,474	1,089	1,112	908	1,301	1,854	2,887	3,614	2,380
Daily average													
2030	3,536	3,681	3,236	2,761	1,406	989	984	892	1,163	1,832	2,778	3,337	2,207
2040	4,174	4,199	3,819	3,258	1,658	1,166	1,160	1,052	1,372	2,163	3,285	3,944	2,599
2050	4,833	5,035	4,422	3,772	1,920	1,350	1,343	1,218	1,588	2,504	3,802	4,566	3,017
2060	5,515	5,543	5,047	4,306	2,193	1,543	1,535	1,391	1,814	2,858	4,332	5,203	3,433
2070	6,063	6,018	5,697	4,863	2,477	1,745	1,736	1,571	2,049	3,227	4,876	5,859	3,836
Hourly average (8 hour day)													
2030	442	460	404	345	176	124	123	111	145	229	347	417	276
2040	522	525	477	407	207	146	145	132	171	270	411	493	325
2050	604	629	553	472	240	169	168	152	199	313	475	571	377
2060	689	693	631	538	274	193	192	174	227	357	542	650	429
2070	758	752	712	608	310	218	217	196	256	403	609	732	479
Peak day (daily average + 30%)													
2030	4,597	4,786	4,207	3,590	1,827	1,286	1,279	1,159	1,512	2,382	3,612	4,338	n/a
2040	5,427	5,459	4,965	4,236	2,156	1,516	1,508	1,368	1,783	2,812	4,271	5,128	n/a
2050	6,283	6,545	5,749	4,904	2,496	1,756	1,746	1,584	2,065	3,255	4,943	5,936	n/a
2060	7,169	7,205	6,561	5,598	2,850	2,006	1,995	1,808	2,358	3,715	5,632	6,764	n/a
2070	7,882	7,823	7,407	6,322	3,221	2,268	2,257	2,042	2,663	4,195	6,339	7,617	n/a
Peak hour (hourly average + 30%)													
2030	575	598	526	449	228	161	160	145	189	298	451	542	n/a
2040	678	682	621	529	269	190	189	171	223	351	534	641	n/a
2050	785	818	719	613	312	219	218	198	258	407	618	742	n/a
2060	896	901	820	700	356	251	249	226	295	464	704	846	n/a
2070	985	978	926	790	403	284	282	255	333	524	792	952	n/a

Table 40: Demand profile for Milford Sound Piopiotahi: Preferred option, $150 access price

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Total visitors to Milford Sound													
2006	69,996	72,993	66,195	47,366	27,316	15,379	14,578	17,126	23,927	41,724	57,849	58,924	513,374
2007	69,726	74,567	67,981	51,083	27,215	15,737	17,951	19,403	28,694	29,635	59,964	60,244	522,200
2008	73,962	75,129	69,162	48,595	27,914	15,509	17,831	16,555	19,477	38,171	53,161	55,769	511,235
2009	65,692	63,935	59,182	47,103	24,268	13,623	14,961	14,634	25,778	36,898	56,131	61,941	484,145
2010	73,498	71,083	59,645	46,088	26,316	16,462	20,351	19,016	18,711	35,152	55,399	61,358	503,078
2011	71,764	68,345	53,081	40,460	20,315	13,824	10,435	15,712	21,777	27,664	48,349	58,169	449,896
2012	69,055	57,879	53,024	42,853	22,271	12,986	17,496	19,924	17,923	27,656	45,615	50,509	437,191
2013	59,982	65,613	56,924	45,331	19,127	4,012	16,836	20,671	20,861	31,723	52,117	63,717	456,913
2014	72,975	71,647	63,673	50,978	25,255	17,220	19,022	17,773	25,034	37,925	53,456	77,668	532,625
2015	81,214	84,701	76,849	57,644	30,579	15,692	19,978	17,840	32,686	44,179	72,549	94,033	627,944
2016	100,651	95,841	93,669	69,926	39,144	26,021	25,866	28,964	40,375	52,264	85,799	103,164	761,685
2017	109,593	102,320	101,879	81,276	45,833	30,796	33,367	29,112	36,607	66,013	89,787	111,165	837,747
2018	118,831	113,582	109,860	87,937	47,701	30,489	28,842	32,528	35,104	63,588	99,313	115,691	883,466
2019	119,167	113,977	107,903	91,486	45,702	32,659	34,462	28,136	39,026	57,482	86,600	112,040	868,641
2030	92,215	86,171	84,673	70,108	37,002	25,411	26,090	23,444	29,616	48,008	68,980	85,951	677,668
2040	108,764	101,719	99,847	82,649	43,608	29,930	30,730	27,641	34,908	56,616	81,512	101,532	799,455
2050	125,937	117,766	115,616	95,704	50,499	34,662	35,589	32,007	40,424	65,557	94,358	117,539	925,657
2060	143,831	134,386	132,073	109,355	57,723	39,642	40,702	36,571	46,198	74,893	107,570	134,040	1,056,983
2070	162,563	151,672	149,331	123,695	65,332	44,909	46,112	41,363	52,271	84,685	121,207	151,116	1,194,255
Average visitors to Milford Sound per day													
2006	2,258	2,607	2,135	1,579	881	513	470	552	798	1,346	1,928	1,901	1,407
2007	2,249	2,663	2,193	1,703	878	525	579	626	956	956	1,999	1,943	1,431
2008	2,386	2,591	2,231	1,620	900	517	575	534	649	1,231	1,772	1,799	1,397
2009	2,119	2,283	1,909	1,570	783	454	483	472	859	1,190	1,871	1,998	1,326
2010	2,371	2,539	1,924	1,536	849	549	656	613	624	1,134	1,847	1,979	1,378
2011	2,315	2,441	1,712	1,349	655	461	337	507	726	892	1,612	1,876	1,233
2012	2,228	1,996	1,710	1,428	718	433	564	643	597	892	1,520	1,629	1,195
2013	1,935	2,343	1,836	1,511	617	134	543	667	695	1,023	1,737	2,055	1,252
2014	2,354	2,559	2,054	1,699	815	574	614	573	834	1,223	1,782	2,505	1,459
2015	2,620	3,025	2,479	1,921	986	523	644	575	1,090	1,425	2,418	3,033	1,720
2016	3,247	3,305	3,022	2,331	1,263	867	834	934	1,346	1,686	2,860	3,328	2,081
2017	3,535	3,654	3,286	2,709	1,478	1,027	1,076	939	1,220	2,129	2,993	3,586	2,295
2018	3,833	4,057	3,544	2,931	1,539	1,016	930	1,049	1,170	2,051	3,310	3,732	2,420
2019	3,844	4,071	3,481	3,050	1,474	1,089	1,112	908	1,301	1,854	2,887	3,614	2,380
Daily average													
2030	2,975	3,078	2,731	2,337	1,194	847	842	756	987	1,549	2,299	2,773	1,857
2040	3,509	3,508	3,221	2,755	1,407	998	991	892	1,164	1,826	2,717	3,275	2,184
2050	4,062	4,206	3,730	3,190	1,629	1,155	1,148	1,032	1,347	2,115	3,145	3,792	2,536
2060	4,640	4,634	4,260	3,645	1,862	1,321	1,313	1,180	1,540	2,416	3,586	4,324	2,888
2070	5,244	5,417	4,817	4,123	2,107	1,497	1,487	1,334	1,742	2,732	4,040	4,875	3,272
Hourly average (8 hour day)													
2030	372	385	341	292	149	106	105	95	123	194	287	347	232
2040	439	438	403	344	176	125	124	111	145	228	340	409	273
2050	508	526	466	399	204	144	144	129	168	264	393	474	317
2060	580	579	533	456	233	165	164	147	192	302	448	540	361
2070	655	677	602	515	263	187	186	167	218	341	505	609	409
Peak day (daily average + 30%)													
2030	3,867	4,001	3,551	3,038	1,552	1,101	1,094	983	1,283	2,013	2,989	3,604	n/a
2040	4,561	4,560	4,187	3,581	1,829	1,297	1,289	1,159	1,513	2,374	3,532	4,258	n/a
2050	5,281	5,468	4,848	4,147	2,118	1,502	1,492	1,342	1,752	2,749	4,089	4,929	n/a
2060	6,032	6,024	5,539	4,739	2,421	1,718	1,707	1,534	2,002	3,141	4,661	5,621	n/a
2070	6,817	7,042	6,262	5,360	2,740	1,946	1,934	1,735	2,265	3,551	5,252	6,337	n/a
Peak hour (hourly average + 30%)													
2030	483	500	444	380	194	138	137	123	160	252	374	451	n/a
2040	570	570	523	448	229	162	161	145	189	297	442	532	n/a
2050	660	683	606	518	265	188	187	168	219	344	511	616	n/a
2060	754	753	692	592	303	215	213	192	250	393	583	703	n/a
2070	852	880	783	670	342	243	242	217	283	444	657	792	n/a

Table 41: Demand profile for Milford Sound Piopiotahi: Preferred option, $200 access price

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Total visitors to Milford Sound													
2006	69,996	72,993	66,195	47,366	27,316	15,379	14,578	17,126	23,927	41,724	57,849	58,924	513,374
2007	69,726	74,567	67,981	51,083	27,215	15,737	17,951	19,403	28,694	29,635	59,964	60,244	522,200
2008	73,962	75,129	69,162	48,595	27,914	15,509	17,831	16,555	19,477	38,171	53,161	55,769	511,235
2009	65,692	63,935	59,182	47,103	24,268	13,623	14,961	14,634	25,778	36,898	56,131	61,941	484,145
2010	73,498	71,083	59,645	46,088	26,316	16,462	20,351	19,016	18,711	35,152	55,399	61,358	503,078
2011	71,764	68,345	53,081	40,460	20,315	13,824	10,435	15,712	21,777	27,664	48,349	58,169	449,896
2012	69,055	57,879	53,024	42,853	22,271	12,986	17,496	19,924	17,923	27,656	45,615	50,509	437,191
2013	59,982	65,613	56,924	45,331	19,127	4,012	16,836	20,671	20,861	31,723	52,117	63,717	456,913
2014	72,975	71,647	63,673	50,978	25,255	17,220	19,022	17,773	25,034	37,925	53,456	77,668	532,625
2015	81,214	84,701	76,849	57,644	30,579	15,692	19,978	17,840	32,686	44,179	72,549	94,033	627,944
2016	100,651	95,841	93,669	69,926	39,144	26,021	25,866	28,964	40,375	52,264	85,799	103,164	761,685
2017	109,593	102,320	101,879	81,276	45,833	30,796	33,367	29,112	36,607	66,013	89,787	111,165	837,747
2018	118,831	113,582	109,860	87,937	47,701	30,489	28,842	32,528	35,104	63,588	99,313	115,691	883,466
2019	119,167	113,977	107,903	91,486	45,702	32,659	34,462	28,136	39,026	57,482	86,600	112,040	868,641
2030	74,813	69,263	69,032	57,381	30,429	21,147	21,677	19,247	24,350	39,218	54,614	68,461	549,631
2040	88,122	81,664	81,294	67,553	35,810	24,872	25,495	22,663	28,662	46,188	64,471	80,785	647,577
2050	102,054	94,562	94,150	78,239	41,477	28,810	29,532	26,247	33,197	53,493	74,642	93,535	749,939
2060	116,708	108,035	107,695	89,520	47,477	32,996	33,824	30,029	37,990	61,191	85,179	106,780	857,424
2070	132,200	122,172	122,041	101,490	53,863	37,469	38,412	34,040	43,083	69,346	96,141	120,599	970,855
Average visitors to Milford Sound per day													
2006	2,258	2,607	2,135	1,579	881	513	470	552	798	1,346	1,928	1,901	1,407
2007	2,249	2,663	2,193	1,703	878	525	579	626	956	956	1,999	1,943	1,431
2008	2,386	2,591	2,231	1,620	900	517	575	534	649	1,231	1,772	1,799	1,397
2009	2,119	2,283	1,909	1,570	783	454	483	472	859	1,190	1,871	1,998	1,326
2010	2,371	2,539	1,924	1,536	849	549	656	613	624	1,134	1,847	1,979	1,378
2011	2,315	2,441	1,712	1,349	655	461	337	507	726	892	1,612	1,876	1,233
2012	2,228	1,996	1,710	1,428	718	433	564	643	597	892	1,520	1,629	1,195
2013	1,935	2,343	1,836	1,511	617	134	543	667	695	1,023	1,737	2,055	1,252
2014	2,354	2,559	2,054	1,699	815	574	614	573	834	1,223	1,782	2,505	1,459
2015	2,620	3,025	2,479	1,921	986	523	644	575	1,090	1,425	2,418	3,033	1,720
2016	3,247	3,305	3,022	2,331	1,263	867	834	934	1,346	1,686	2,860	3,328	2,081
2017	3,535	3,654	3,286	2,709	1,478	1,027	1,076	939	1,220	2,129	2,993	3,586	2,295
2018	3,833	4,057	3,544	2,931	1,539	1,016	930	1,049	1,170	2,051	3,310	3,732	2,420
2019	3,844	4,071	3,481	3,050	1,474	1,089	1,112	908	1,301	1,854	2,887	3,614	2,380
Daily average													
2030	2,413	2,474	2,227	1,913	982	705	699	621	812	1,265	1,820	2,208	1,506
2040	2,843	2,816	2,622	2,252	1,155	829	822	731	955	1,490	2,149	2,606	1,769
2050	3,292	3,377	3,037	2,608	1,338	960	953	847	1,107	1,726	2,488	3,017	2,055
2060	3,765	3,725	3,474	2,984	1,532	1,100	1,091	969	1,266	1,974	2,839	3,445	2,343
2070	4,265	4,363	3,937	3,383	1,738	1,249	1,239	1,098	1,436	2,237	3,205	3,890	2,660
Hourly average (8 hour day)													
2030	302	309	278	239	123	88	87	78	101	158	228	276	188
2040	355	352	328	281	144	104	103	91	119	186	269	326	221
2050	412	422	380	326	167	120	119	106	138	216	311	377	257
2060	471	466	434	373	191	137	136	121	158	247	355	431	293
2070	533	545	492	423	217	156	155	137	180	280	401	486	332
Peak day (daily average + 30%)													
2030	3,137	3,216	2,895	2,487	1,276	916	909	807	1,055	1,645	2,367	2,871	n/a
2040	3,695	3,661	3,409	2,927	1,502	1,078	1,069	950	1,242	1,937	2,794	3,388	n/a
2050	4,280	4,390	3,948	3,390	1,739	1,248	1,238	1,101	1,439	2,243	3,234	3,922	n/a
2060	4,894	4,843	4,516	3,879	1,991	1,430	1,418	1,259	1,646	2,566	3,691	4,478	n/a
2070	5,544	5,672	5,118	4,398	2,259	1,624	1,611	1,427	1,867	2,908	4,166	5,057	n/a
Peak hour (hourly average + 30%)													
2030	392	402	362	311	160	115	114	101	132	206	296	359	n/a
2040	462	458	426	366	188	135	134	119	155	242	349	423	n/a
2050	535	549	494	424	217	156	155	138	180	280	404	490	n/a
2060	612	605	565	485	249	179	177	157	206	321	461	560	n/a
2070	693	709	640	550	282	203	201	178	233	364	521	632	n/a

SUBREGIONAL COST AND BENEFIT PROFILE FOR THE PREFERRED OPTION

This section shows annual cost and benefit profiles for the preferred option for the Milford Sound Piopiotahi subregion. All values are in expressed in real 2020 dollars, and no discounting has been applied.

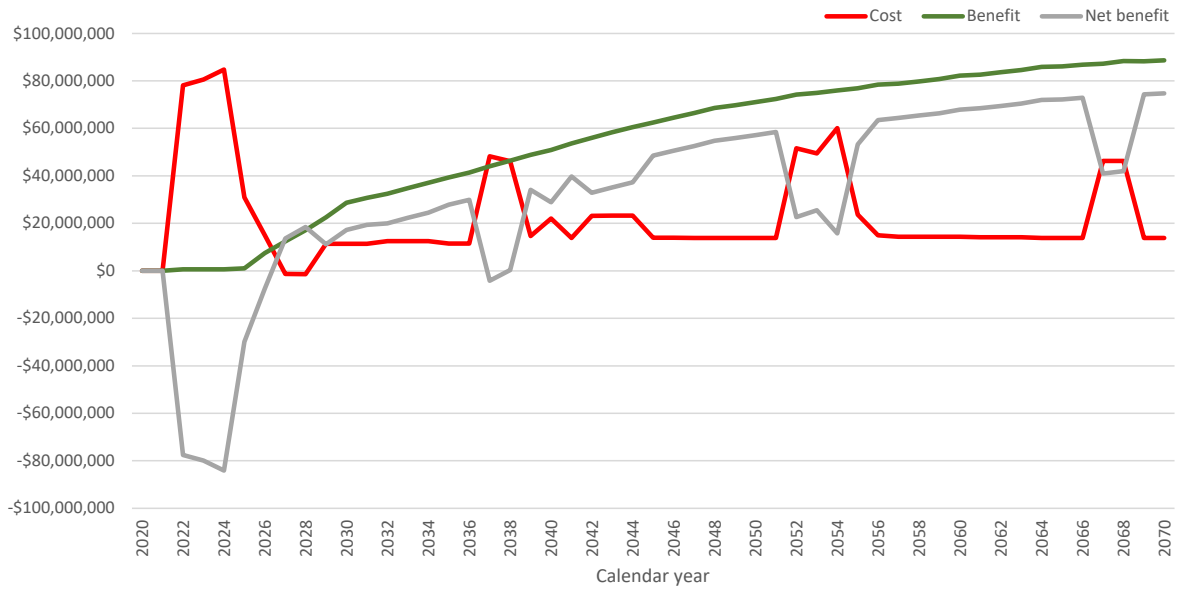


Figure 77: Cost and benefit profile for the preferred option with no access price

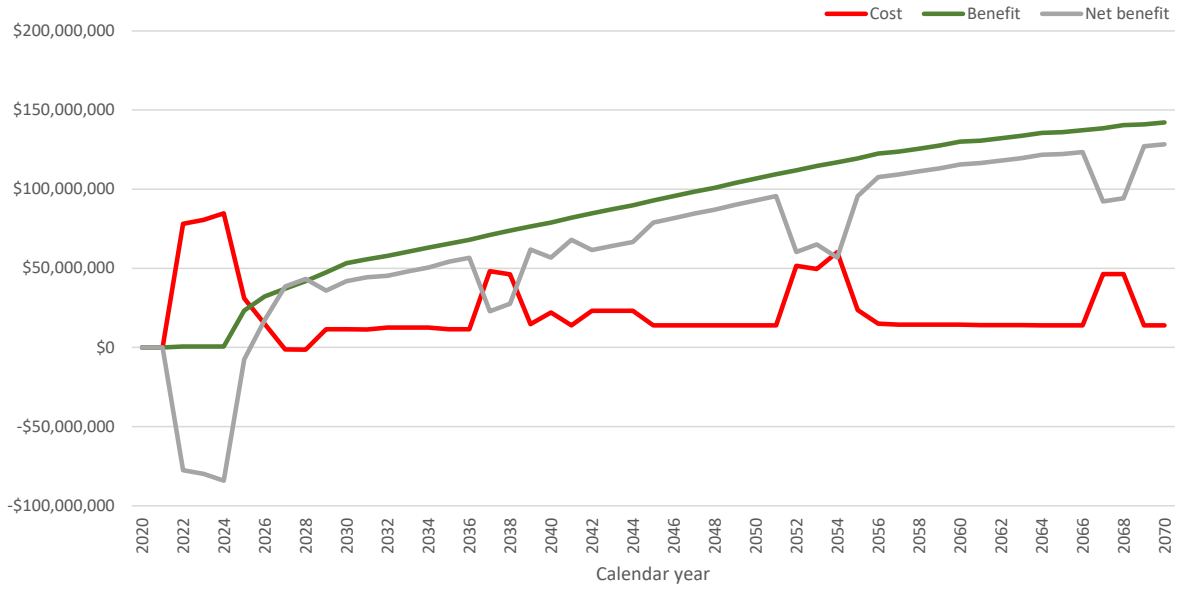


Figure 78: Cost and benefit profile for the preferred option with $50 access price

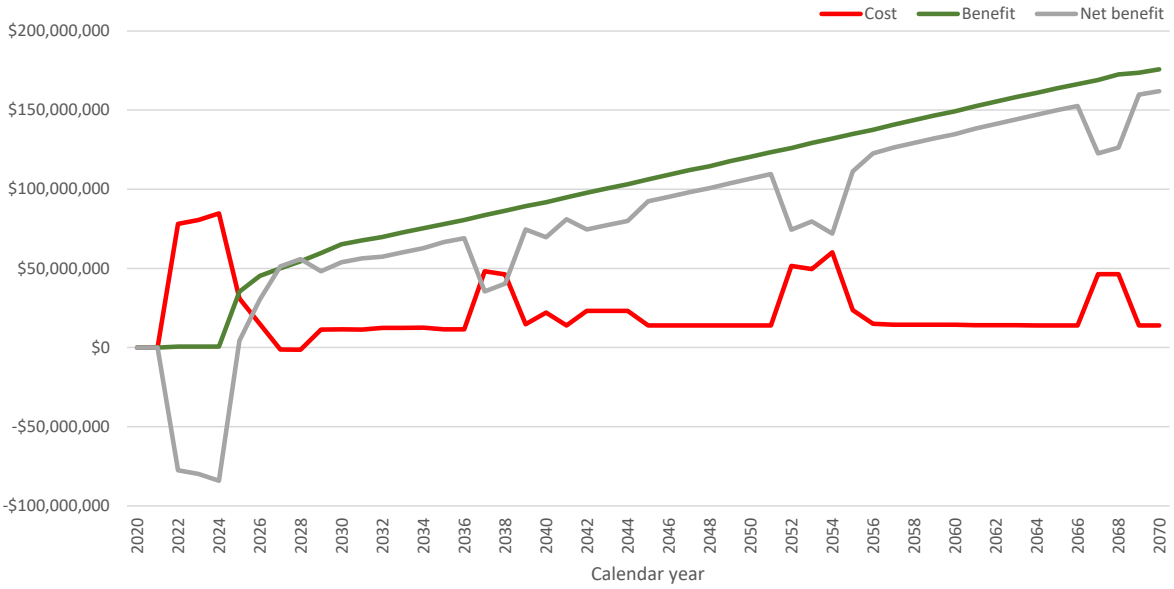


Figure 79: Cost and benefit profile for the preferred option with $100 access price

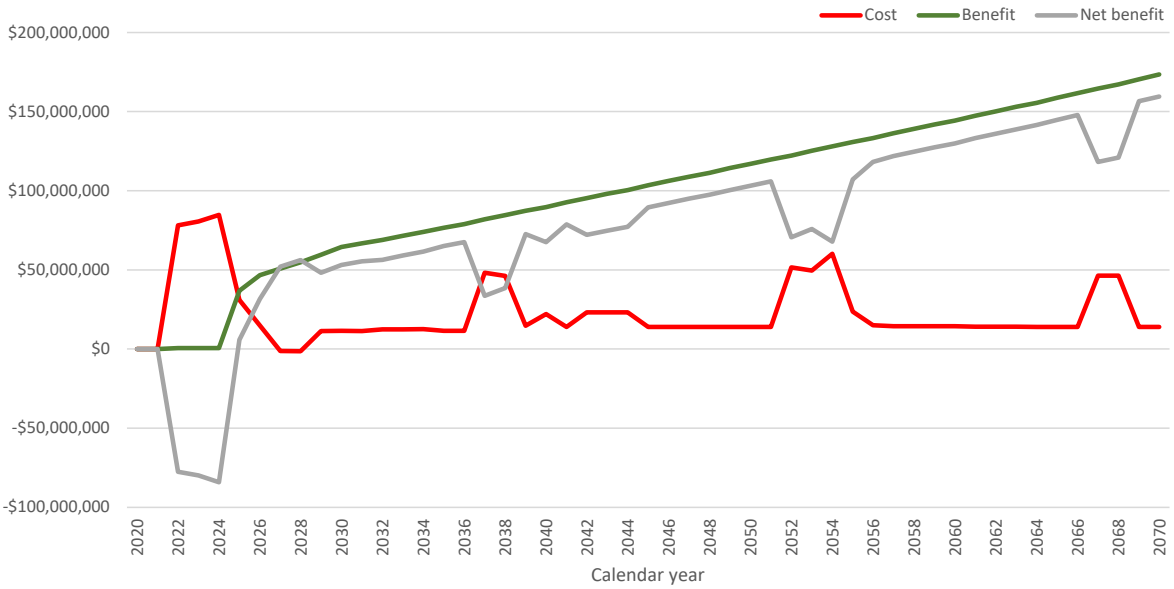


Figure 80: Cost and benefit profile for the preferred option with $150 access price

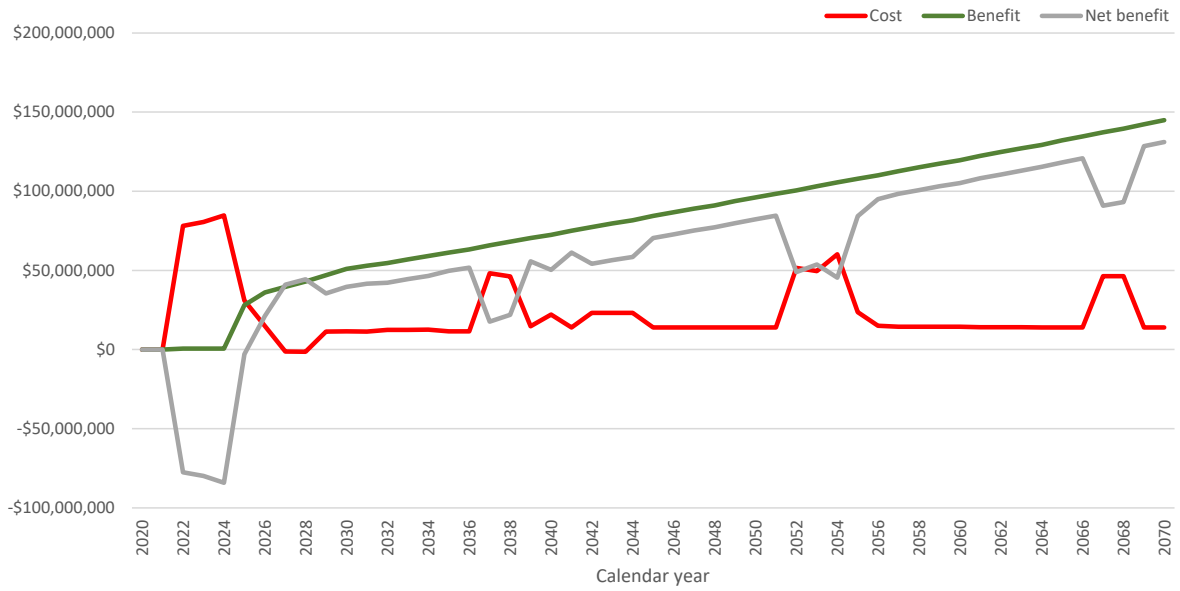


Figure 81: Cost and benefit profile for the preferred option with $200 access price

NATIONAL COST AND BENEFIT PROFILE FOR THE PREFERRED OPTION

This section shows national cost and benefit profiles for the preferred option. All values are in expressed in real 2020 dollars, and no discounting has been applied.

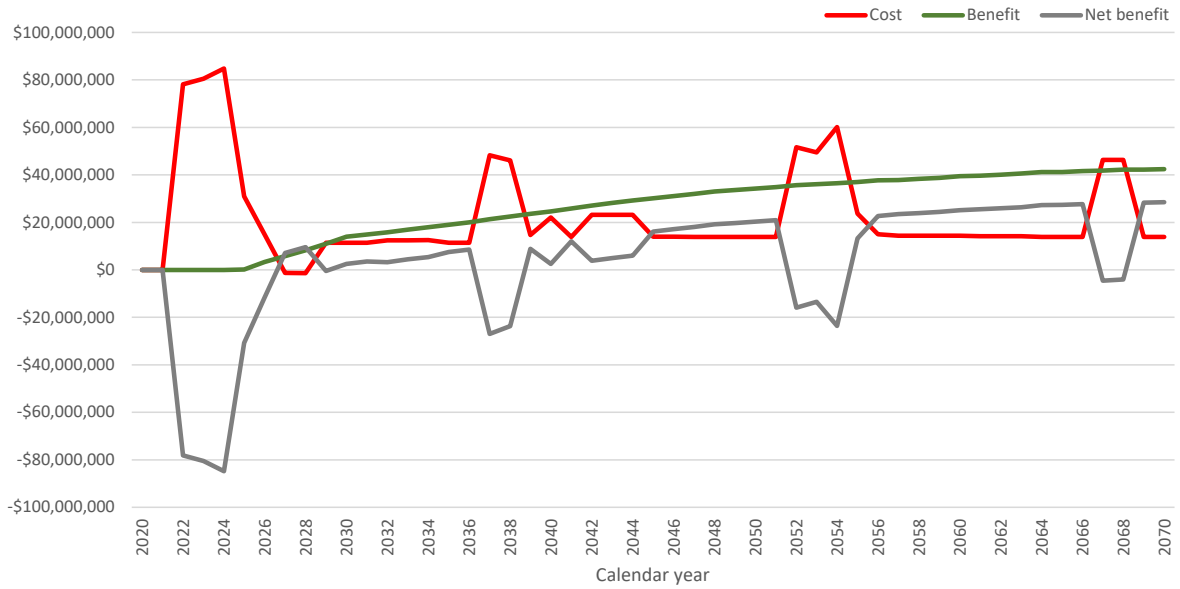


Figure 82: Cost and benefit profile for the preferred option with no access price

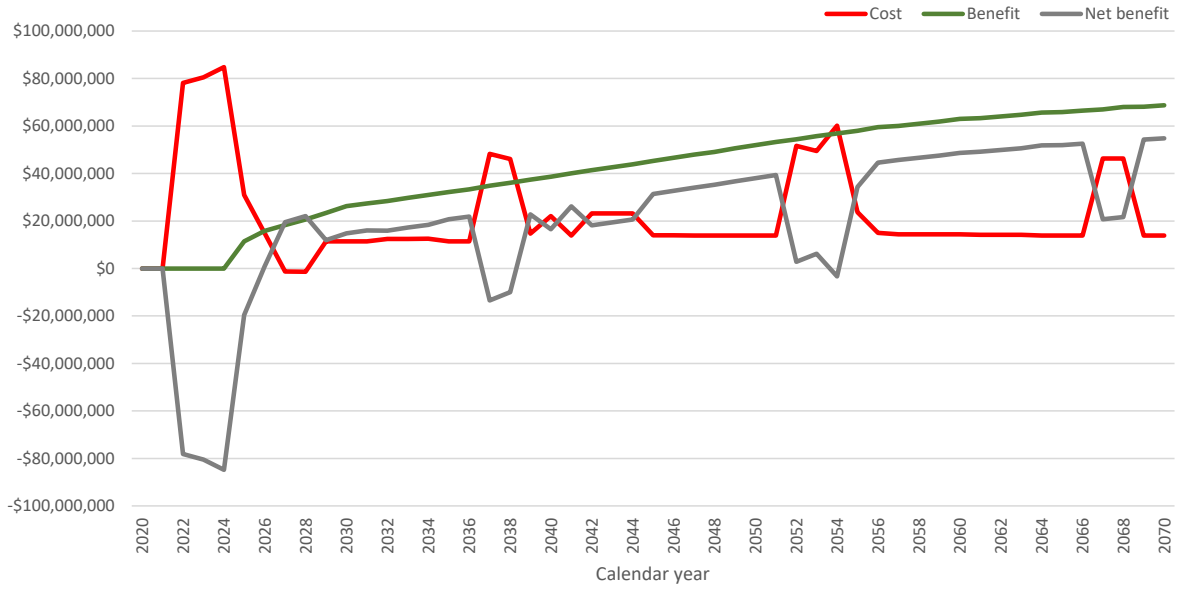


Figure 83: Cost and benefit profile for the preferred option with $50 access price

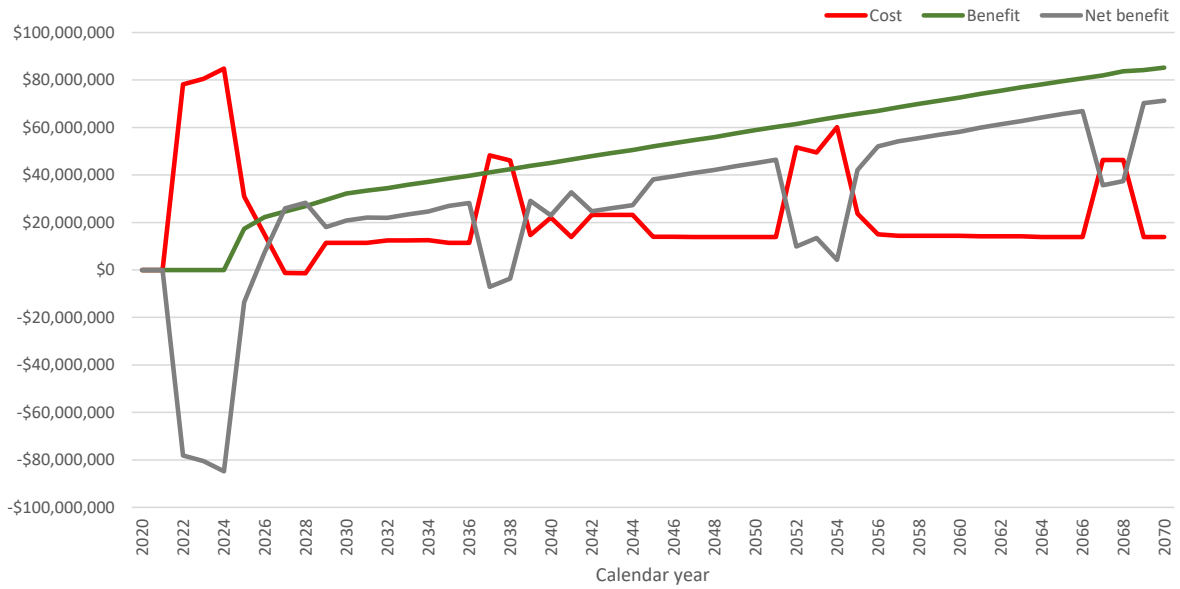


Figure 84: Cost and benefit profile for the preferred option with $100 access price

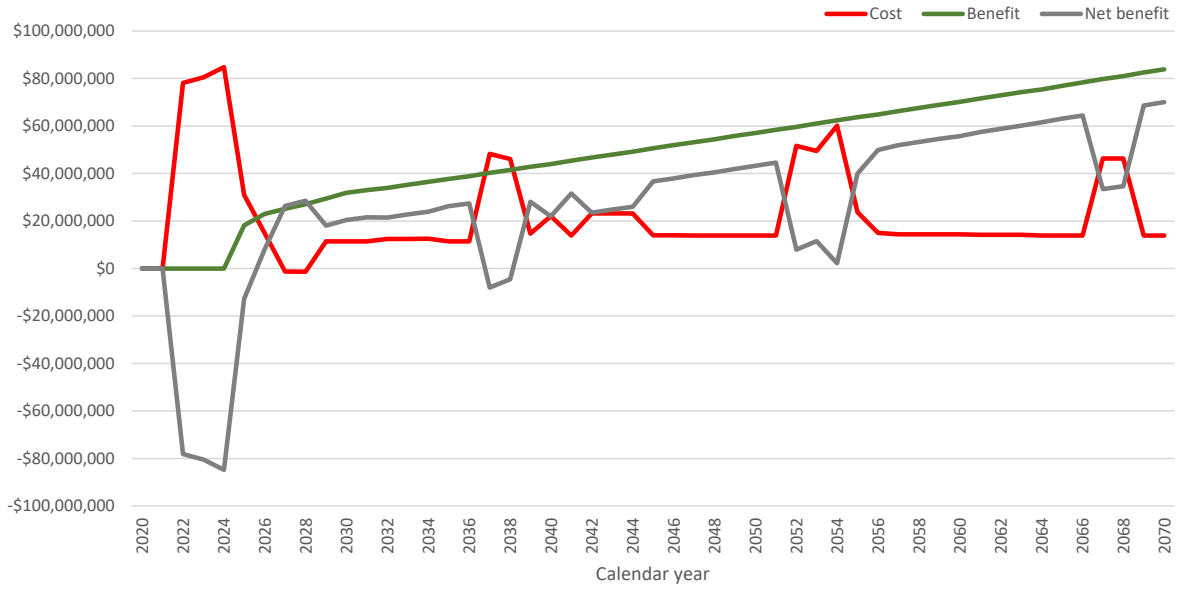


Figure 85: Cost and benefit profile for the preferred option with $150 access price

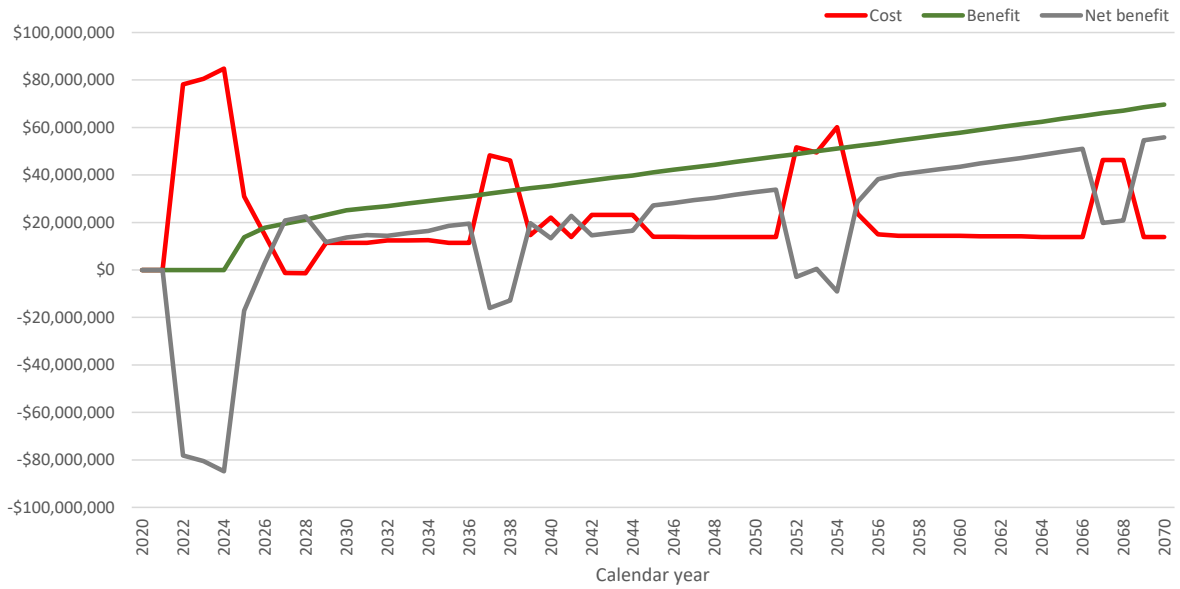


Figure 86: Cost and benefit profile for the preferred option with $200 access price

TOURISM OUTCOMES FOR PREFERRED OPTION WITH $50 ACCESS PRICE

This section provides an annual summary of the tourism outcomes caused by the preferred outcome with a $50 access price.

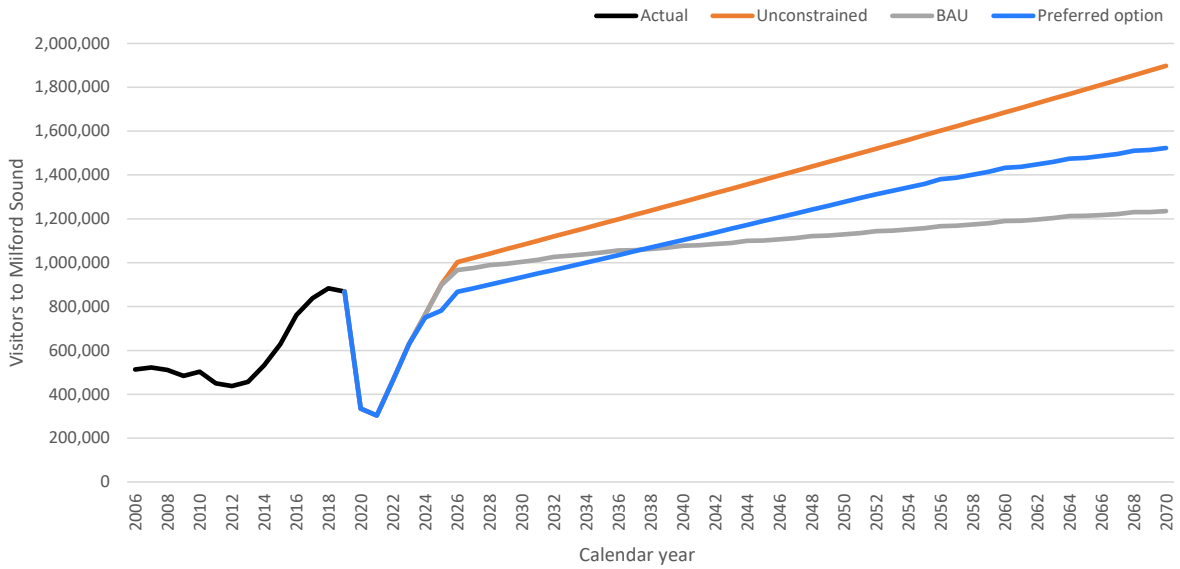


Figure 87: Number of visitors to Milford Sound Piopiotahi

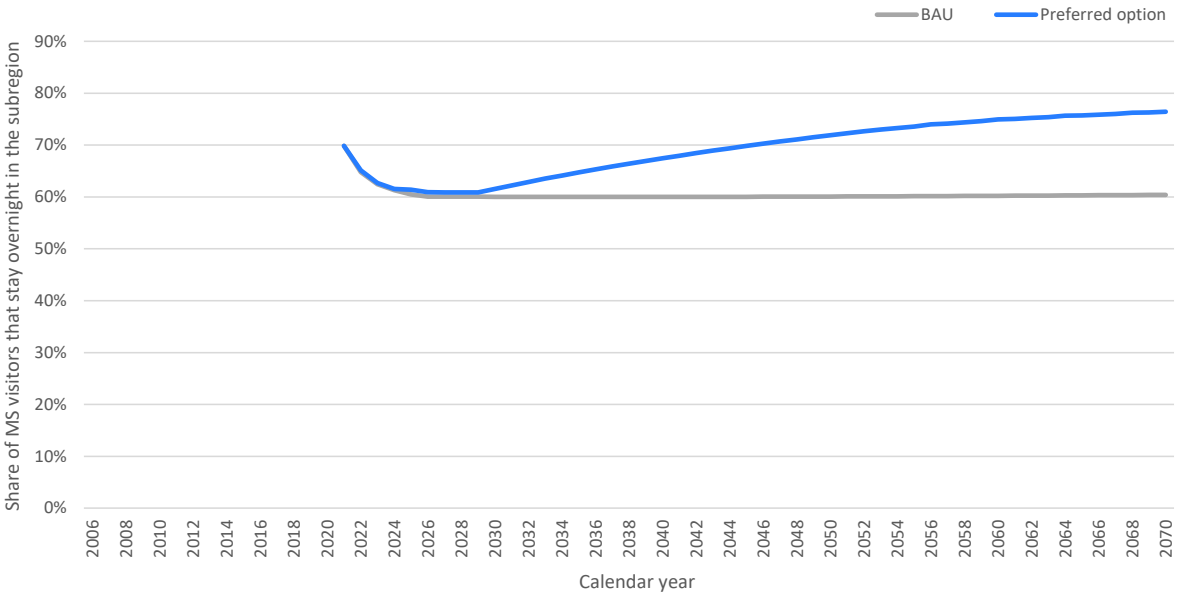


Figure 88: Share of visitors to Milford Sound Piopiotahi that stay overnight in the subregion.

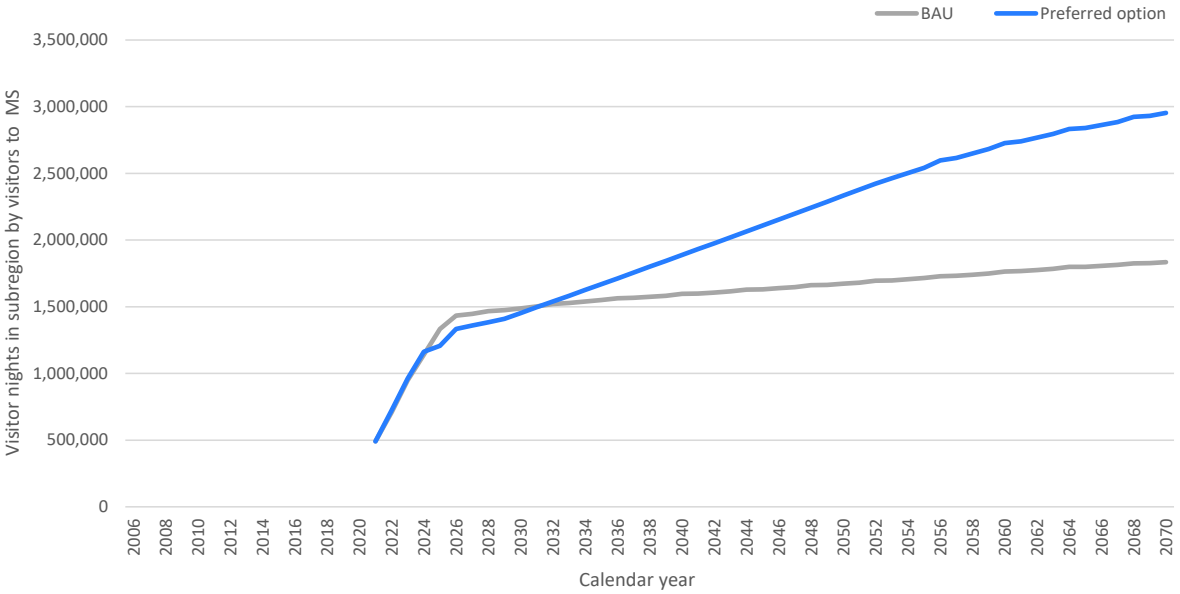


Figure 89: Visitors nights spent in the subregion by visitors to Milford Sound Piopiotahi

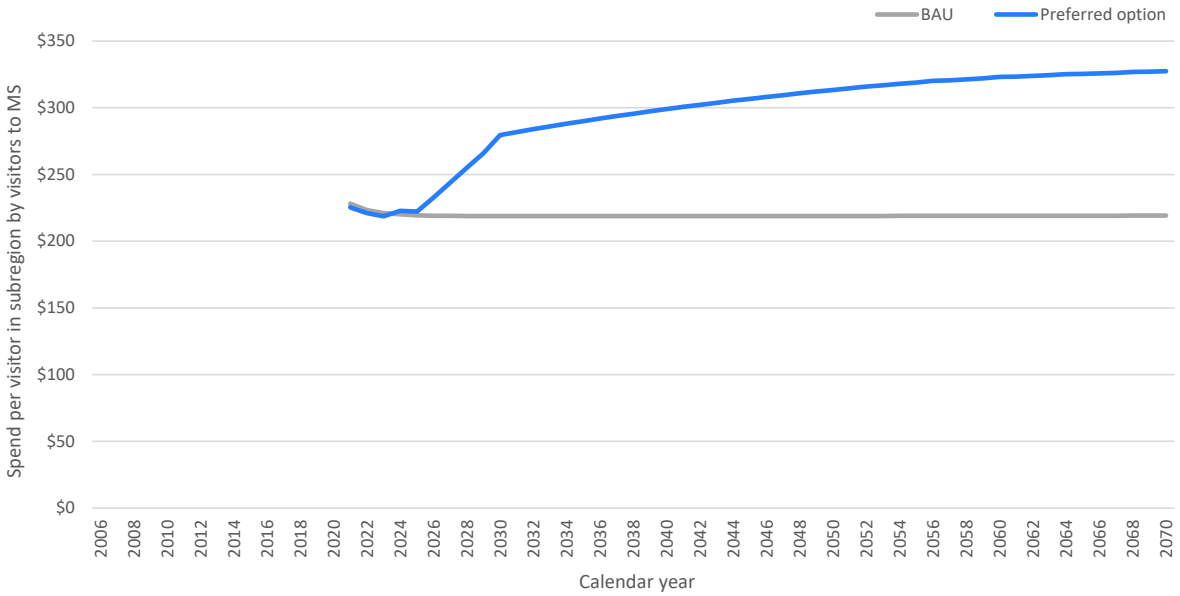


Figure 90: Spend per visitor in the subregion by visitors to Milford Sound Piopiotahi

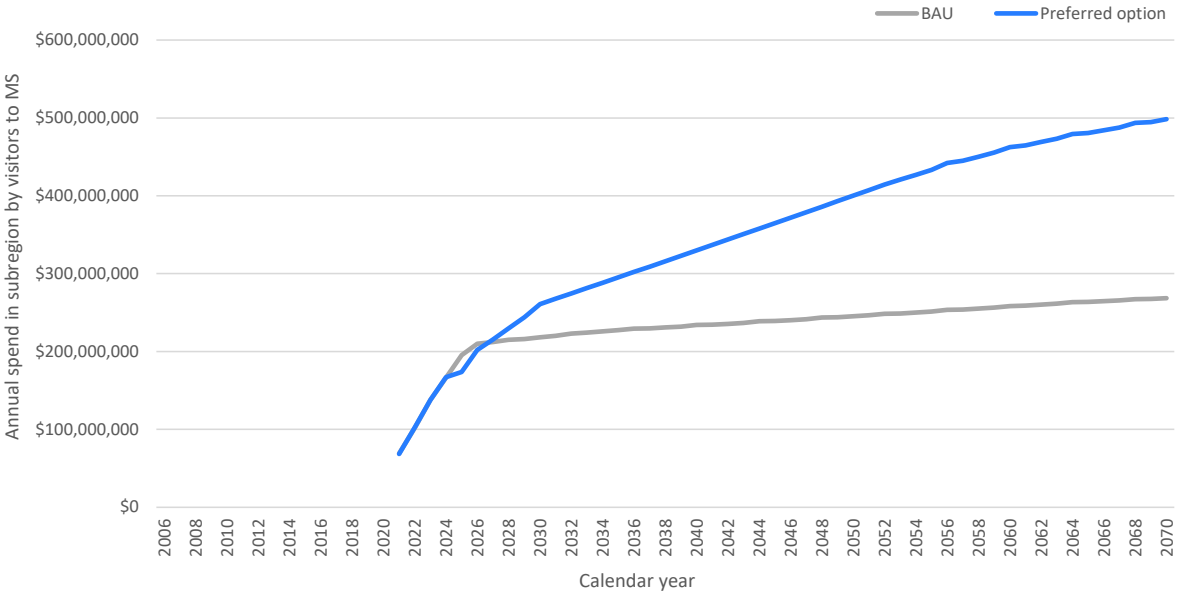


Figure 91: Annual spend in the subregion by visitors to Milford Sound Piopiotahi

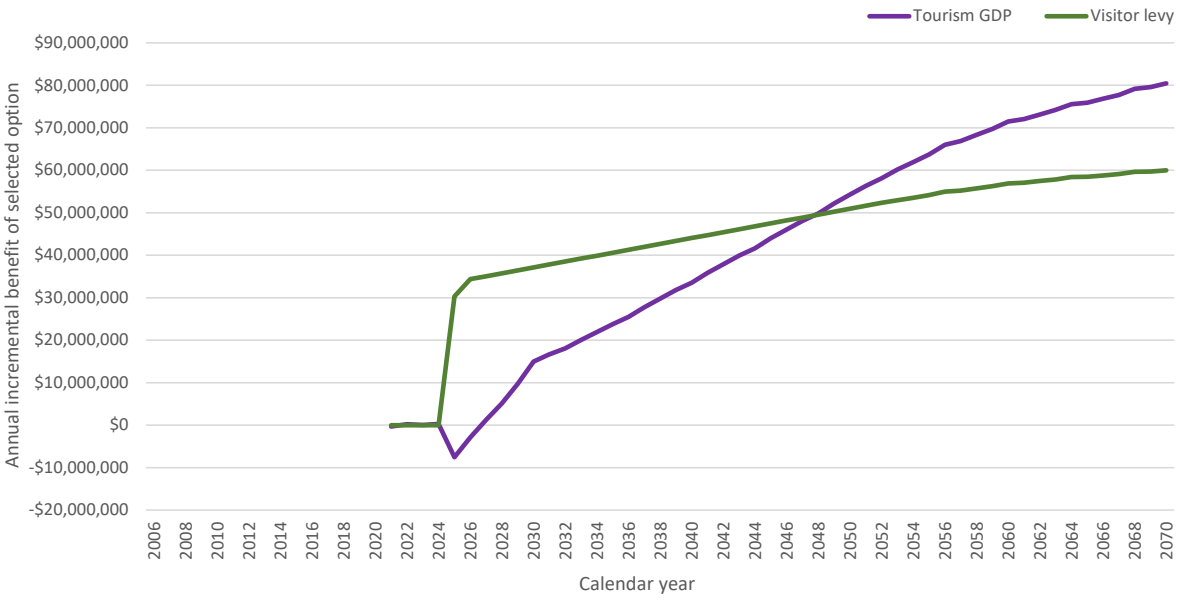


Figure 92: Annual incremental benefits to the subregion of the preferred option (relative to status quo)

PRICE ELASTICITY OF DEMAND

A literature review was undertaken to inform assumptions regarding how visitor demand would respond to the imposition of an access fee. An access fee would effectively increase the price paid by visitors to experience Milford Sound Piopiotahi, over and above the circa $150 per person cost of transport and a boat cruise (which is expected to remain the main activity undertaken by visitors).

An increase in price is expected to have a negative impact on the number of visitors who choose to visit Milford Sound Piopiotahi in any given year. The extent of the reduction in visitation will depend on the underlying price elasticity of demand for Milford Sound Piopiotahi. For a given increase in price (say 5%), elastic demand would result in a higher than proportional (greater than 5%) reduction in demand while inelastic demand would result in a lower than proportional (less than 5%) reduction in demand. Given Piopiotahi's status as an iconic, 'must-see' destination for visitors with few close substitutes, demand for Piopiotahi is expected to be inelastic.

The objectives of the literature review were to test the assumption of inelastic demand and elicit evidence regarding the likely strength of inelasticity (or elasticity as the case may be). In order to obtain insights that are applicable to Milford Sound Piopiotahi, the review focussed on elasticity studies involving national parks. Five relevant studies were found, two from Australia, two from Costa Rica and one from the USA. High-level results from the studies are summarised in the table below.

Table 42: Price elasticity of demand for national parks

Park	Country	Elasticity
Yellowstone National Park	USA	-0.27
Volcan Irazu (1998 study)	Costa Rica	-1.049
Volcan Poas (1998 study)	Costa Rica	-2.869
Manuel Antonio (1998 study)	Costa Rica	-0.963
Volcan Irazu (1999 study)	Costa Rica	-0.296
Volcan Poas (1999 study)	Costa Rica	-0.051
Manuel Antonio (1999 study)	Costa Rica	-0.238
Noosa	Australia	-0.884
Rainforest	Australia	-0.378
Carnarvon	Australia	-0.299
Outback	Australia	-0.256
Kakadu National Park	Australia	-0.014
Hinchinbrook Island National Park	Australia	-0.002
Mean		**-0.582**
Median		**-0.296**
Midpoint between mean and median		**-0.439**

Almost all the parks involved in the studies exhibited inelastic demand (elasticity between 0 and -1). This is consistent with the special character and quality of national parks and the typically limited availability of close substitutes within a comparable travel distance, both of which are true for Milford Sound Piopiotahi. The mean elasticity across all studies was -0.582, however this value is inflated by the outlier result relating to Volcan Poas. The median, which can be a better measure of central tendency in the presence of outliers, is -0.296. The midpoint between the mean and median honours all the data points reported in the studies while giving less than full weight to the outlier value. This value, -0.44, is adopted for the purpose of the CBA.

PRICE BENCHMARKING

The Tourism team researched prices for a range of New Zealand visitor experiences to understand where Piopiotahi sits relative to other activities and the extent to which there may be scope to raise prices. Table 9 contains price benchmarks for 18 New Zealand visitor experiences that include a tour element. Prices per hour are also provided to assist with comparison between activities of varying duration.

The benchmarks indicate that Piopiotahi (at an average price of ~$150 per person (pp) for a coach and boat experience) is relatively good value compared with other iconic New Zealand visitor experiences.

It is important to note that these prices are based on advertised values in mid/late 2020 and are therefore likely to understate pre-Covid prices.

Table 43: Visitor experience price benchmarks

Experience	Price (adult)	Hours (approx.)	Price per hour
Milford Sound self-drive & boat	$79	8	$10
Milford Sound bus & boat ex Te Anau	$129	8	$16
Milford Sound bus & boat ex Queenstown	$179	12	$15
Franz Josef Glacier tour	$485	3	$162
Kinloch Golf Taupo	$350	4	$88
Mount Cook tour	$290	11	$26
Nevis bungy	$275	1	$275
Food & wine tour Queenstown	$269	6.5	$41
Abel Tasman tour	$230	9	$26
Jacks Point Golf	$195	5	$39
Ziplining Queenstown	$195	3	$65
Coronet skiing	$190	8	$24
Glenorchy tour	$169	4	$42
Shotover jet	$159	1.5	$106
Kaikoura Whale Watch	$150	3	$50
Rotorua tree canopy tour	$149	3	$50
Cape Reinga tour	$140	10	$14
Bay of Islands cruise	$135	7	$19
Queenstown Bridge Swing	$116	1	$116
Rotorua Maori Village	$110	2	$55
Meet Mataatua Express Whakatane	$49	1	$49
Average	$190	5	$69
Average for < 5 hours duration	$175	3	$90
Average for 5+ hours duration	$214	7	$43