

# Milford Opportunities Project - Open Survey Preliminary Report

## This survey

The Milford Opportunities Project was established in 2017 to create an ambitious and innovative masterplan for Milford Sound Piopiotahi, the Milford corridor and the region surrounding it. As part of this, engagement with stakeholders and the public is essential and a variety of approaches have been used to get feedback and thoughts from every point of view.

Earlier public forums and stakeholder engagement identified a number of improvement suggestions. Because of the area's national importance, the project team wanted further feedback on these suggestions as well as new input from as wide a range of New Zealanders as possible. An open public online survey was developed and circulated widely through key contacts and organisations; their forwarding processes; and published public notifications. All contained live survey links to provide an opportunity for a wider public to view these suggestions and provide their own input.

An initial set of questions summarised some key perspective areas of the respondents for assisting identification of response contexts.

### 1. Response Sector and Perspective

Previous public forums and stakeholder engagement identified a number of common improvement suggestions. These suggestions were summarised and grouped as option categories under a series of key themes. As a main question about each key theme, respondents were asked to select a preferred option category (or to nominate an 'Other option' which they could then specify). Each main question was also followed by an open comments/ideas question about the theme. The theme areas were:

2. Cruise ships
3. Milford Sound Piopiotahi Arrival Experience
4. Milford Sound Piopiotahi Visitor/Information Centre
5. Milford Sound Piopiotahi Vehicle Parking
6. Visitor Park and Ride (to Milford Sound Piopiotahi)
7. Transport Options to Milford Road Visitor Sites (along State Highway 94)
8. Milford Road Visitor Sites/Activities (along State Highway 94)
9. Milford Road Visitor Accommodation Sites/Facilities (along State Highway 94)
10. Airport/Air Services at Milford Sound Piopiotahi Airport
11. Milford Sound Piopiotahi Visitor Activities and Facilities
12. Milford Sound Piopiotahi Accommodation
13. Costs

## Response Level

The survey link was opened by around 1,400 prospective respondents. Of these there were 977 responses with sufficient content to provide value. Response totals for different individual questions varied.

## This Preliminary Report

This summary report presents the Part 1 high-level summary of main findings to date. Coded summaries and analyses of the extensive complementary open-ended question responses are still under way. Summary details from this in-depth question analysis will follow in the Part 2 Survey Report.

# 1. Respondent Context and perspective

Starter questions briefly addressed the response context of respondents before the main themes were addressed. These questions included:

- **previous participation** in any earlier project consultations – few (48 = 5%) had done so.
- **previous visits** to Milford Sound Piopiotahi – virtually all (901 = 93%) had done so.
- their **home locations** – which demonstrated a wide geographical coverage across New Zealand. (see 1.1 Respondent Geographical Distribution below)
- **main interest perspectives** – most indicated ‘Wider general public’ or ‘Recreation user’ perspectives, with ‘Tourism’ and ‘Conservation’ perspectives also well represented. These represented a wide sectoral coverage. (see 1.2 ‘Respondent Sector Coverage’ below)

## 1.1.1 Respondent Geographical Distribution

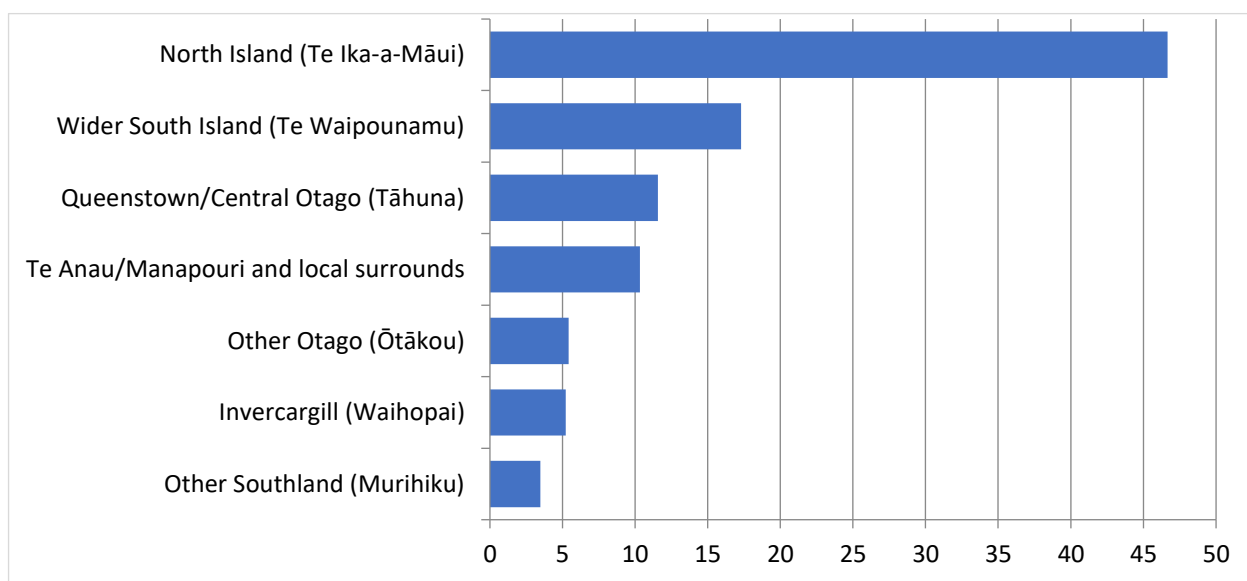
Respondents were asked the general area they lived in, to provide some context for their responses. The following table and associated chart summarise the findings. In summary, results demonstrate:

- a wide geographical spread of responses, and
- a healthy proportions of local area respondents

Table 1.1: Respondent Geographical Distribution

	Count	%
North Island (Te Ika-a-Māui)	456	47
Wider South Island (Te Waipounamu)	169	17
Queenstown/Central Otago (Tāhuna)	113	12
Te Anau/Manapouri and local surrounds	101	10
Other Otago (Ōtākou)	53	5
Invercargill (Waihopai)	51	5
Other Southland (Murihiku)	34	3
		(Total = 977)

Figure 1.1: Respondent Geographical Distribution (%)



## 1.2 Respondent Sector Coverage

This question broadly asked survey respondents to tick the box that most represented their main survey response perspective. This was aimed at defining their main sector-interest area. The tick-box options were:

- Wider general public perspective
- Recreation User perspective
- Tourism Sector perspective
- Conservation perspective (volunteer, employee, personal interest)
- Local area management/administration perspective

To provide added depth of context respondents were then asked to describe the nature of their primary perspective/interest. Detail from 836 open-ended responses about their perspective to be summarised in the Part 2 Survey Report.

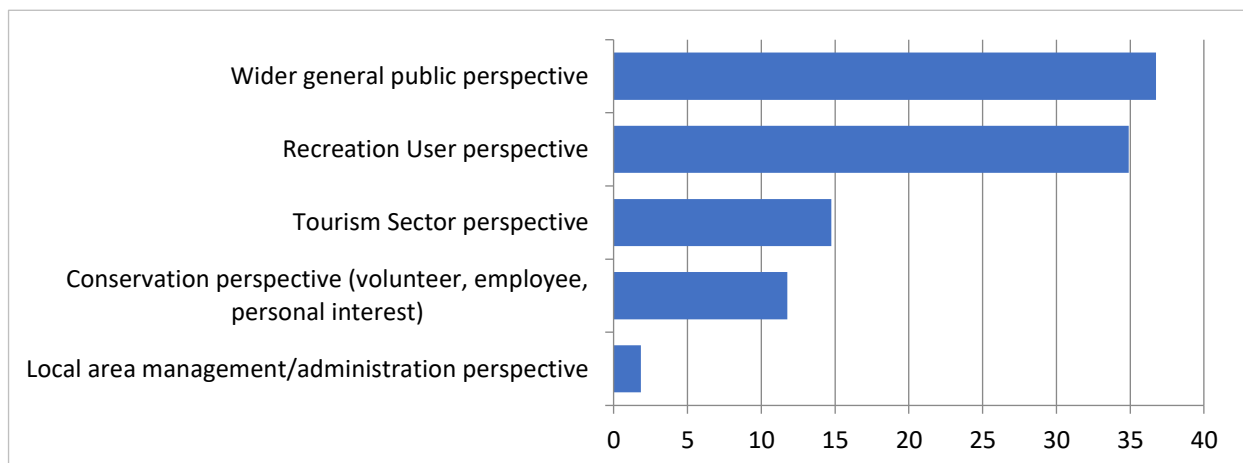
In summary, results to date demonstrate:

- a high proportion of general public/recreation user sector respondents
- a notable number of tourism and conservation sector respondents

Table 1.2: Respondent Sector Perspective

	count	%
Wider general public perspective	359	37
Recreation User perspective	341	35
Tourism Sector perspective	144	15
Conservation perspective (volunteer, employee, personal interest)	115	12
Local area management/administration perspective	18	2
		Total 977

Figure 1.2: Respondent Sector Perspective (%)



Looking at perspective relative to home location, more local-area respondents tended to have higher proportions of tourism perspectives, while respondents from further away tended to have more general public and/or recreation sector perspectives.

## 2. Response Theme - Cruise Ships

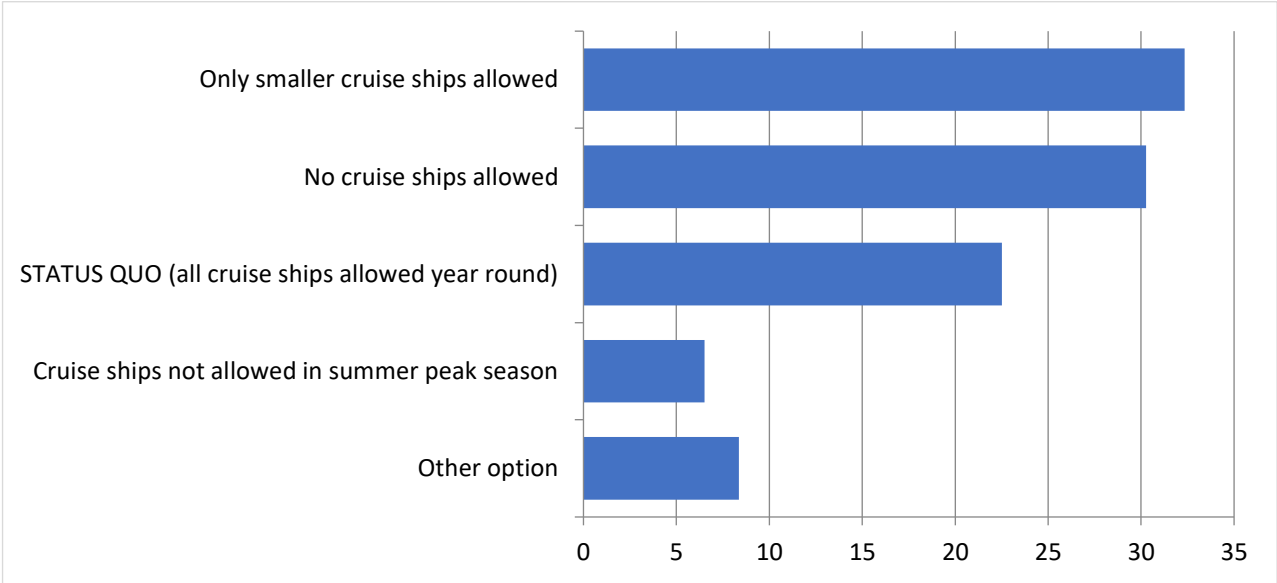
Respondents were asked to tick a box for their most preferred idea option for future management. Table 2 and Figure 2 summarise responses. In Summary, results to date demonstrate:

- only 30% felt there should be no cruise ships
- of the 70% who indicated cruise ships should be allowed, only 23% preferred the current status quo.
- The remaining 47% felt there should be some reduction in impact – with the most prominent control option being that only smaller Cruise ships should be allowed.
- Among those 8% specifying some ‘Other option’ the most prominent responses were
  - Limited cruise ship numbers
  - Only allow vessels meeting environmental impact standards
- **More managed cruise ship access and impacts was a key theme here.**

Table 2: Preferred Management Option – Cruise Ships

	count	%
Only smaller cruise ships allowed	313	32
No cruise ships allowed	293	30
STATUS QUO (all cruise ships allowed year around)	218	23
Cruise ships not allowed in summer / peak season	63	7
Other option	81	8
		Total 968

Figure 2: Preferred Management Option – Cruise Ships (%)



A supplementary open-ended question allowed for expansion of additional ideas, references or other and comments. Detail from 554 open-ended responses about this theme to be summarised in the Part 2 Survey Report.

### 3. Response Theme – Milford Sound Piopiotahi Arrival Experience

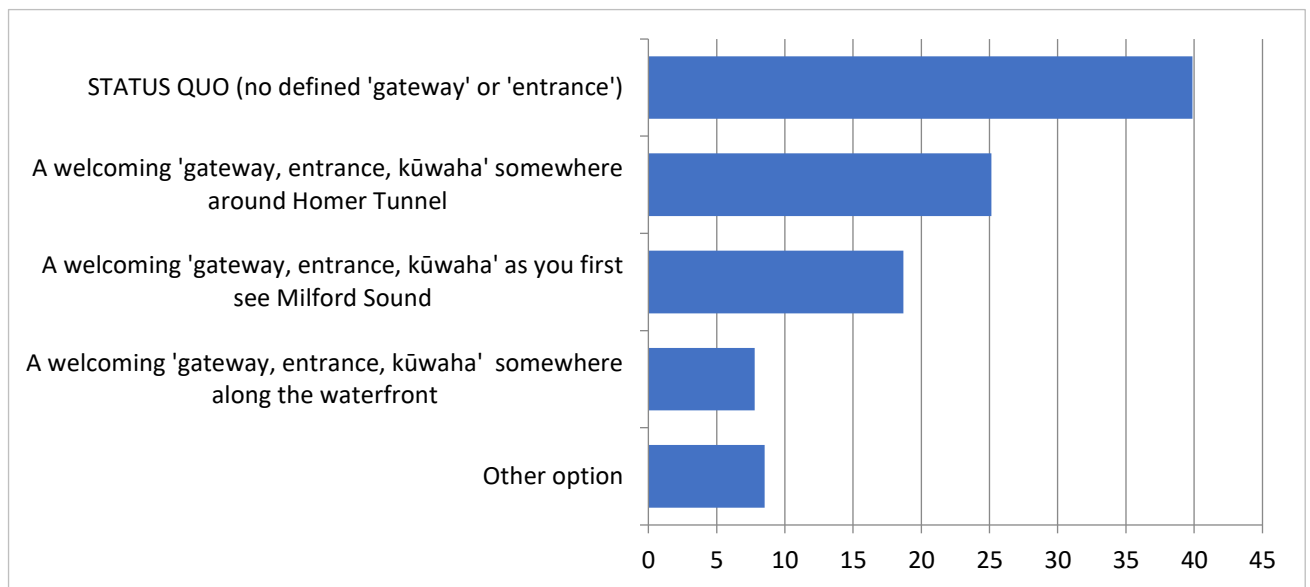
Respondents were asked to tick a box for their most preferred idea option for future management. Table 3 and Figure 3 summarise responses. In Summary, results to date demonstrate:

- 40 % felt there should be no defined 'gateway' or 'entrance'
- of the 60% who indicated a defined 'gateway' or 'entrance' should be done, most felt it should either be:
  - around Homer Tunnel (25%) or
  - when you first see Milford Sound Piopiotahi (19%).
  - Relatively few (8%) favoured along the waterfront at the village.
- Among those few (9%) specifying some 'Other option' the most prominent responses were
  - Along the Milford Road/ FMP boundary
  - At Te Anau
- **Some form of greater site/area definition and recognition was a key theme here.**

Table 3: Preferred Management Option – Milford Sound Piopiotahi Arrival Experience

	count	%
STATUS QUO (no defined 'gateway' or 'entrance')	384	40
A welcoming 'gateway, entrance, kūwaha' somewhere around Homer Tunnel	242	25
A welcoming 'gateway, entrance, kūwaha' as you first see Milford Sound	180	19
A welcoming 'gateway, entrance, kūwaha' somewhere along the waterfront	75	8
Other option	82	9
		Total 963

Figure 3: Preferred Management Option – Milford Sound Piopiotahi Arrival Experience (%)



A supplementary open-ended question allowed for expansion of additional ideas, references or other and comments. Detail from 424 open-ended responses about this theme to be summarised in the Part 2 Survey Report.

#### 4. Response Theme – Milford Sound Piopiotahi Visitor/Information Centre

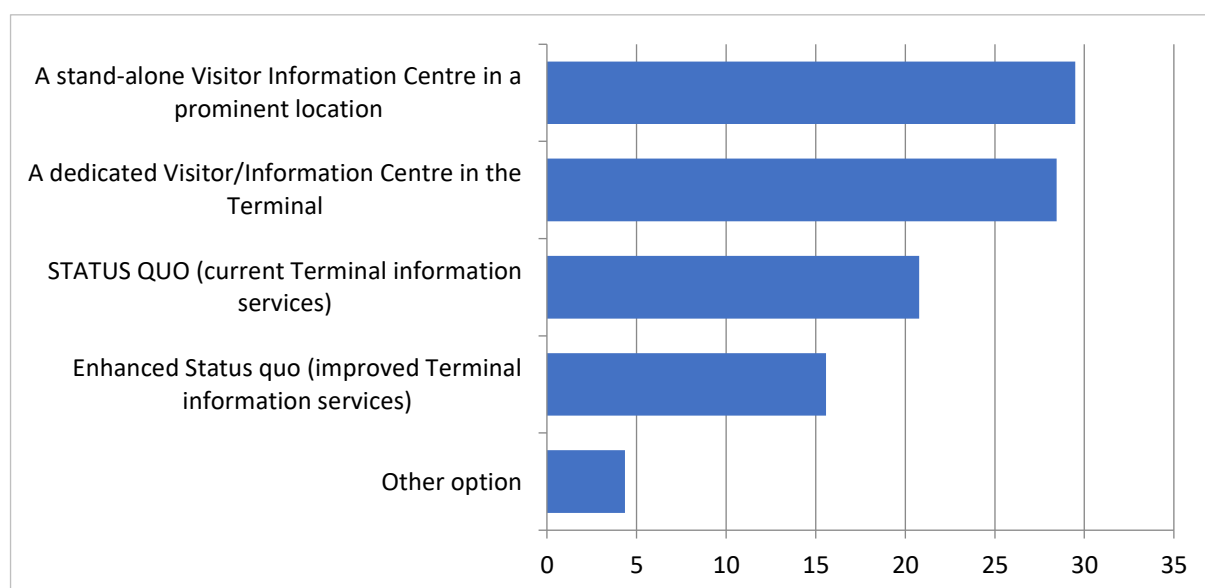
Respondents were asked to tick a box for their most preferred idea option for future management. Table 4 and Figure 4 summarise responses. In Summary, results to date demonstrate:

- only 21 % favoured the current status quo in the terminal.
- The remaining 79% indicated some improved provision, with most preferring some dedicated site either:
  - at some new standalone location (29%) or
  - some dedicated space/facility in the current terminal (28%), or at least some improvement of the current service there (16%)
- few (4%) specified some 'Other option'
- **Visitor/information service enhancement was a key theme here.**

Table 4: Preferred Management Option – Milford Sound Piopiotahi Visitor/Information Centre

	count	%
A stand-alone Visitor Information Centre in a prominent location	284	29
A dedicated Visitor/Information Centre in the Terminal	274	28
STATUS QUO (current Terminal information services)	200	21
Enhanced Status quo (improved Terminal information services)	150	16
Other option	42	4
		Total 950

Figure 4: Preferred Management Option – Milford Sound Piopiotahi Visitor/Information Centre (%)



A supplementary open-ended question allowed for expansion of additional ideas, references or other and comments. Detail from 316 open-ended responses about this theme to be summarised in the Part 2 Survey Report.

## 5. Response Theme – Milford Sound Piopiotahi Vehicle Parking

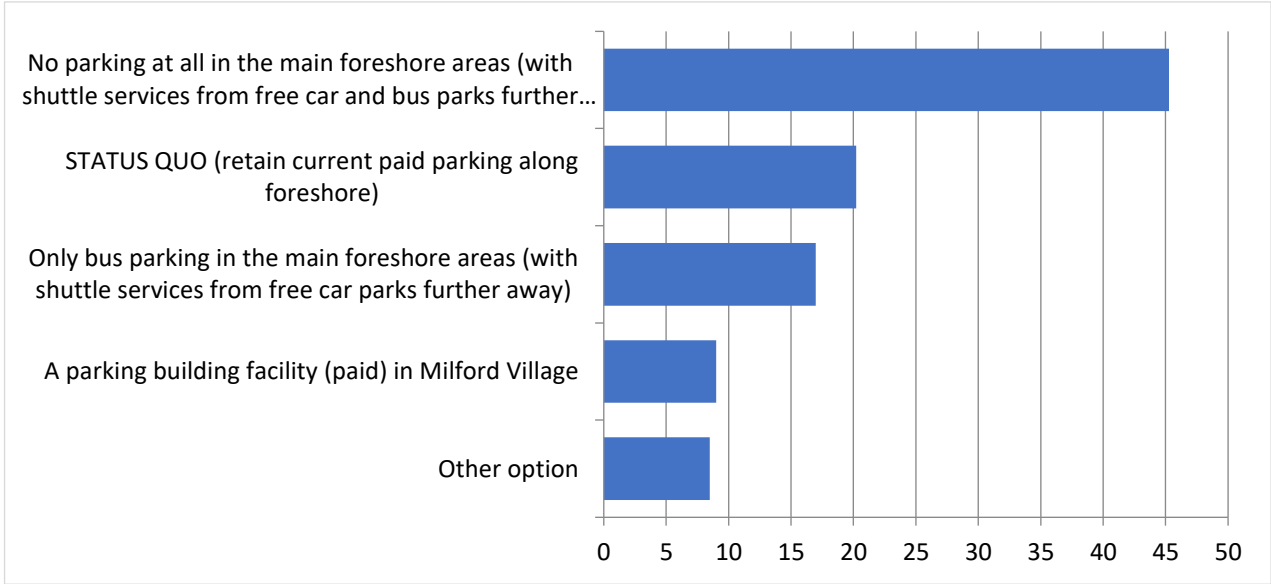
Respondents were asked to tick a box for their most preferred idea option for future management. Table 5 and Figure 5 summarise responses. In Summary, results to date demonstrate:

- only 20 % favoured the current status quo.
- most of the remaining 80% favoured removal or significant reduction of any parking in the foreshore area.
- of those who specified some ‘Other option’ (8%), most referred to some sort of ‘park and ride’ and/or similar shuttle-related options from more distant parking areas.
- parking costs were only noted by a few respondents here (more comment in open-ended question content).
- **Removing vehicle presence in the foreshore was a key theme here.**

Table 5: Preferred Management Option – Milford Sound Piopiotahi Vehicle Parking

	count	%
No parking at all in the main foreshore areas (with shuttle services from free car and bus parks further away)	432	45
STATUS QUO (retain current paid parking along foreshore)	193	20
Only bus parking in the main foreshore areas (with shuttle services from free car parks further away)	162	17
A parking building facility (paid) in Milford Village	86	9
Other option	81	8
		Total 954

Figure 5: Preferred Management Option – Milford Sound Piopiotahi Visitor/Information Centre (%)



A supplementary open-ended question allowed for expansion of additional ideas, references or other and comments. Detail from 376 open-ended responses about this theme to be summarised in the Part 2 Survey Report.

### 6. Response Theme – Visitor Park and Ride (by bus/shuttle service)

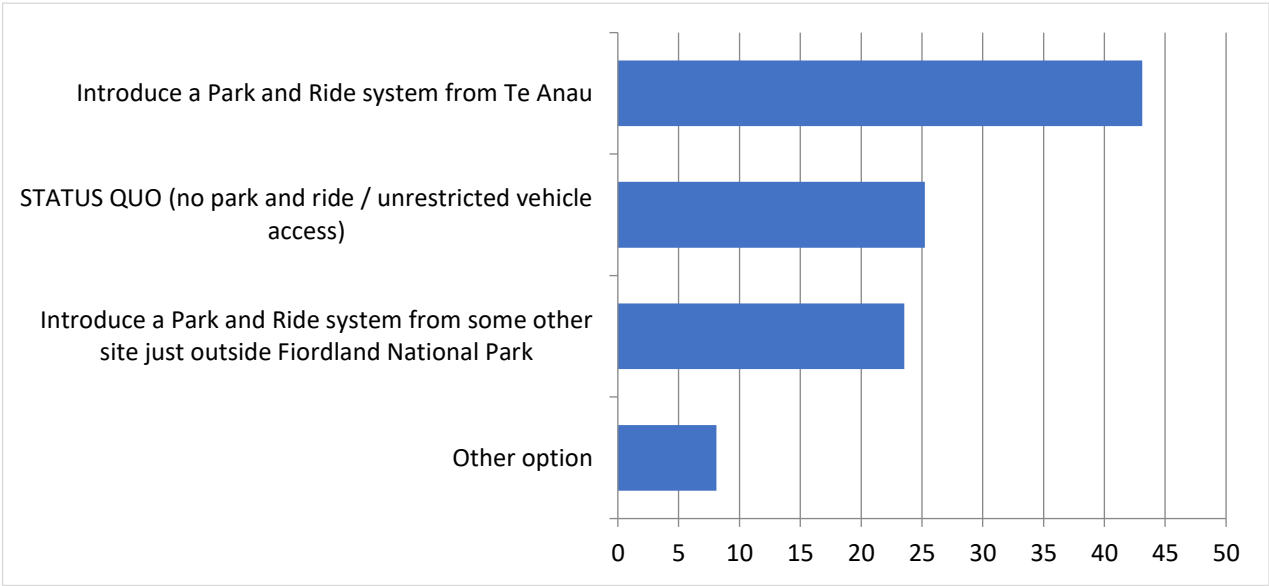
Respondents were asked to tick a box for their most preferred idea option for future management. Table 6 and Figure 6 summarise responses. In Summary, results to date demonstrate:

- only 25% favoured the current status quo.
- most of the remaining 75% favoured some type of park and ride system, with most favouring Te Anau as a base (43%).
- of those who specified some ‘Other option’ (8%), most referred to some sort of mixed system incorporating various ‘park and ride’ sites and other free access options.
- **Flexibility of access was a key theme here.**

Table 6: Preferred Management Option – Visitor Park and Ride (by bus/shuttle service)

	count	%
Introduce a Park and Ride system from Te Anau	410	43
STATUS QUO (no park and ride / unrestricted vehicle access)	240	25
Introduce a Park and Ride system from other site just outside Fiordland National Park	224	24
Other option	77	8
		Total 951

Figure 6: Preferred Management Option – Visitor Park and Ride (by bus/shuttle service) (%)



A supplementary open-ended question allowed for expansion of additional ideas, references or other and comments. Detail from 399 open-ended responses about this theme to be summarised in the Part 2 Survey Report.



## 7. Response Theme – Transport Options to Milford Road Visitor Sites

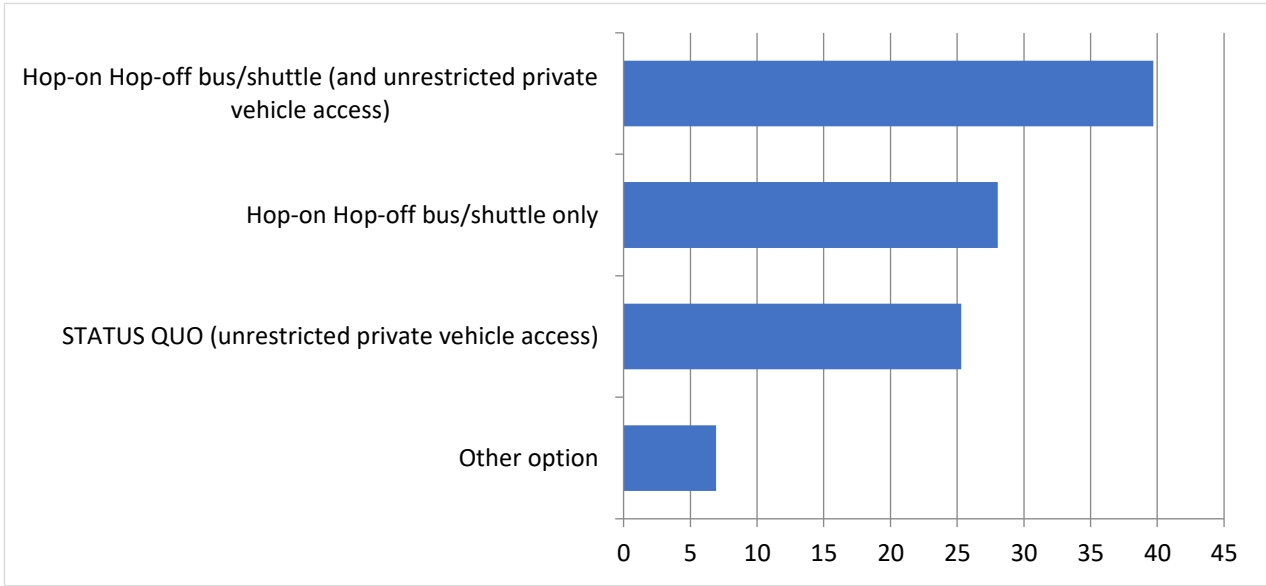
Respondents were asked to tick a box for their most preferred idea option for future management. Table 7 and Figure 7 summarise responses. In Summary, results to date demonstrate:

- only 25% favoured the current status quo.
- of the remaining 75%, most (68%) favoured incorporation of some form of Hop-on/Hop-off bus/shuttle services.
- Of these most (40%) preferred mixed systems allowing private vehicle access while others preferred an exclusive system (20%).
- of those who specified some 'Other option' (7%), most referred to some sort of mixed system incorporating both Hop-on/Hop-off and private components.
- **Flexibility of access along the corridor was a key theme here.**

Table 7: Preferred Management Option – Transport Options to Milford Road Visitor Sites

	count	%
Hop-on Hop-off bus/shuttle (and unrestricted private vehicle access)	378	40
Hop-on Hop-off bus/shuttle only	267	28
STATUS QUO (unrestricted private vehicle access)	241	25
Other option	66	7
		Total 952

Figure 7: Preferred Management Option – Transport Options to Milford Road Visitor Sites (%)



A supplementary open-ended question allowed for expansion of additional ideas, references or other and comments. Detail from 283 open-ended responses about this theme to be summarised in the Part 2 Survey Report.

### 8. Response Theme – Milford Road Visitor Sites/Activities

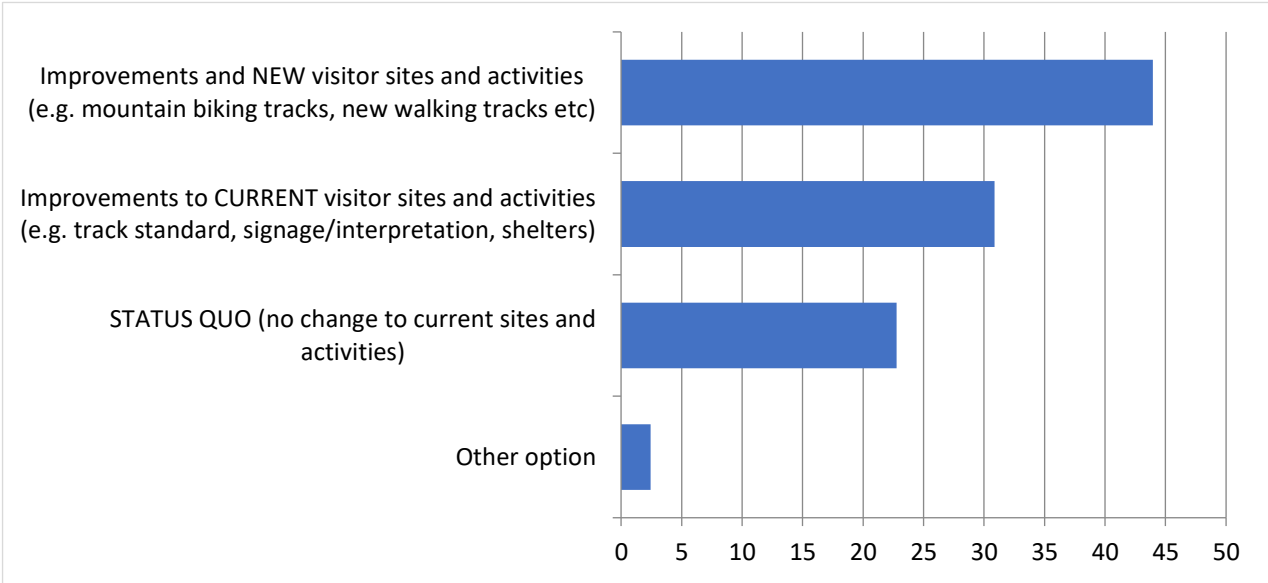
Respondents were asked to tick a box for their most preferred idea option for future management. Table 8 and Figure 8 summarise responses. In Summary, results to date demonstrate:

- only 23% favoured the current status quo.
- of the remaining 77%, most (44%) favoured enhancing current sites and creating new site and activity options. The others (31%) favoured at least current site improvements.
- only a very few specified some ‘Other option’ (7%).
- **Improvement in activity opportunities was a key theme here.**

Table 8: Preferred Management Option – Milford Road Visitor Sites/Activities

	count	%
Improvements and NEW visitor sites and activities (e.g. mountain biking tracks, new walking tracks etc)	417	44
Improvements to CURRENT visitor sites and activities (e.g. track standard, signage/interpretation, shelters)	293	31
STATUS QUO (no change to current sites and activities)	216	23
Other option	23	2
		Total 949

Figure 8: Preferred Management Option – Milford Road Visitor Sites/Activities (%)



A supplementary open-ended question allowed for expansion of additional ideas, references or other and comments. Detail from 302 open-ended responses about this theme to be summarised in the Part 2 Survey Report.

## 9. Response Theme – Milford Road Accommodation Sites/Facilities

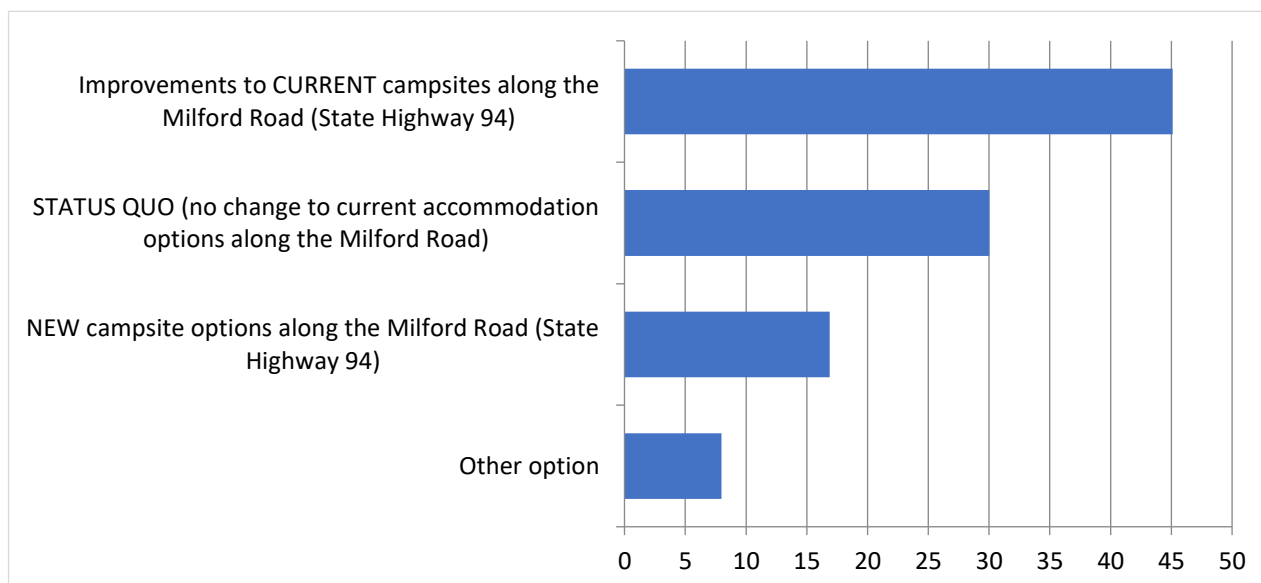
Respondents were asked to tick a box for their most preferred idea option for future management. Table 9 and Figure 9 summarise responses. In Summary, results to date demonstrate:

- only 30% favoured the current status quo.
- of the remaining 70%, most (44%) favoured enhancing current sites. The others (30%) favoured also creating new site options.
- of those who specified some 'Other option' (8%), most referred to some sort of restricted uses, particularly with respect to freedom camping.
- **Improvement in accommodation opportunities was a key theme here.**

Table 9: Preferred Management Option – Milford Road Accommodation Sites/Facilities

	count	%
Improvements to CURRENT campsites along the Milford Road (State Highway 94)	430	45
STATUS QUO (no change to current accommodation options along Milford Road)	286	30
NEW campsite options along the Milford Road (State Highway 94)	161	17
Other option	76	8
		Total 953

Figure 9: Preferred Management Option – Milford Road Accommodation Sites/Facilities (%)



A supplementary open-ended question allowed for expansion of additional ideas, references or other and comments. Detail from 279 open-ended responses about this theme to be summarised in the Part 2 Survey Report.

## 10. Response Theme – Airport/Air Services at Milford Sound Piopiotahi

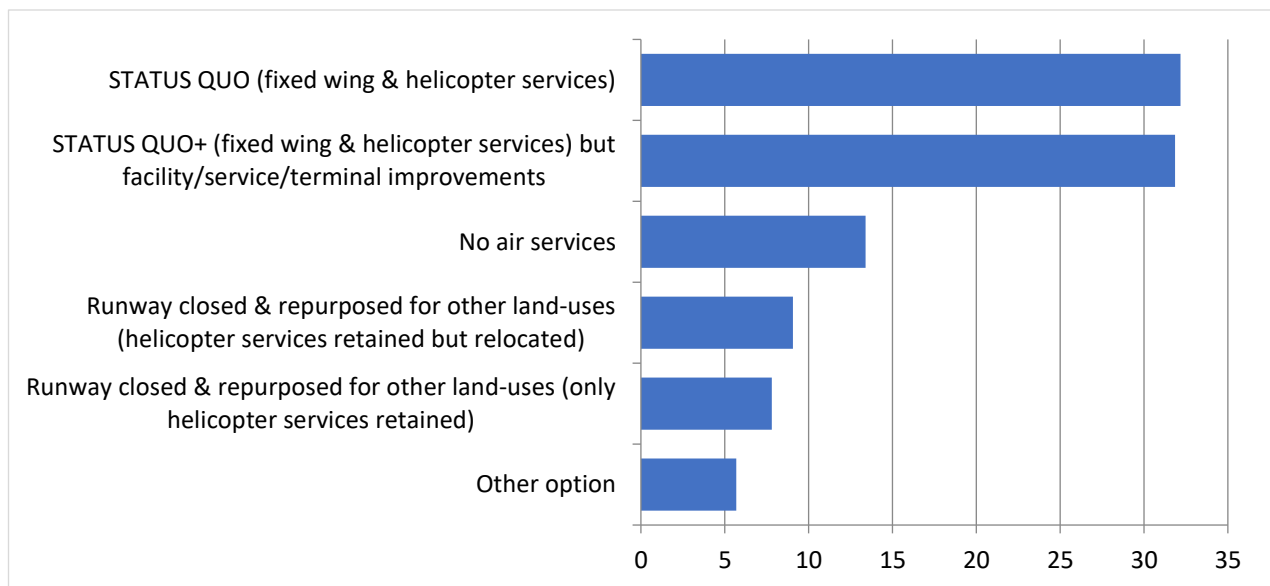
Respondents were asked to tick a box for their most preferred idea option for future management. Table 10 and Figure 10 summarise responses. In Summary, results to date demonstrate:

- only 13% favoured removing air services from the airport
- of the remaining 87%, most (64%) favoured retaining the status quo (with some key facility /service improvements).
- Around 17% favoured closing the runway but retaining helicopter services.
- **Improved status quo was a key theme here.**

Table 10: Preferred Management Option – Milford Road Accommodation Sites/Facilities

	count	%
STATUS QUO (fixed wing & helicopter services)	305	32
STATUS QUO+ (fixed wing & helicopter) but facility/service/terminal improvements	302	32
No air services	127	13
Runway closed & repurposed for other uses (helicopter services retained but relocated)	86	9
Runway closed & repurposed for other uses (only helicopter services retained)	74	8
Other option	54	6
		Total 948

Figure 10: Preferred Management Option – Milford Road Accommodation Sites/Facilities (%)



A supplementary open-ended question allowed for expansion of additional ideas, references or other and comments. Detail from 285 open-ended responses about this theme to be summarised in the Part 2 Survey Report.

## 11. Response Theme – Milford Sound Piopiotahi Visitor Activities/Facilities

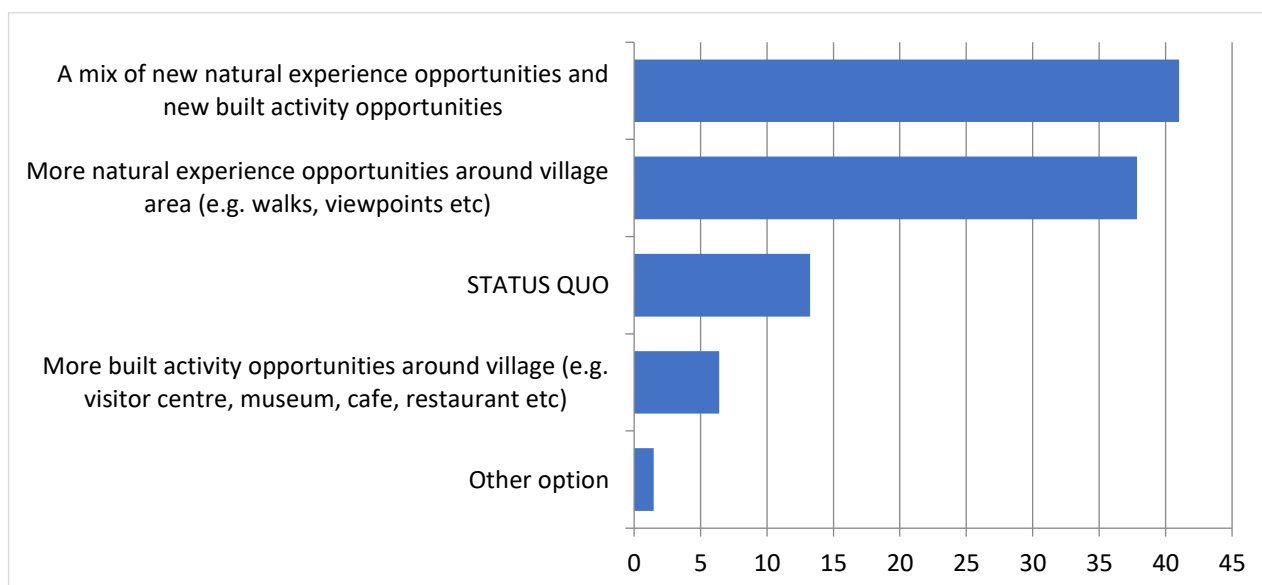
Respondents were asked to tick a box for their most preferred idea option for future management. Table 11 and Figure 11 summarise responses. In Summary, results to date demonstrate:

- only 13% favoured the status quo of visitor activities and related facilities around the village
- of the remaining 87%, most (79%) favoured either a mix of new or improved natural and/or built visitor experience opportunities (41%). Most of this focus was on the natural experience opportunities, with only a few (6%) favouring just built activity opportunities.
- Very few indicated any 'Other option'
- **More things to do was a key theme here, with a strong focus on natural experiences.**

Table 11: Preferred Management Option – Milford Sound Piopiotahi Visitor Activities/Facilities

	count	%
A mix of new natural experience opportunities and new built activity opportunities	390	41
More natural experience opportunities around village area (e.g. walks, viewpoints etc)	360	38
STATUS QUO	126	13
More built activity opportunities around village (e.g. visitor centre, museum, cafe, restaurant etc)	61	6
Other option	14	1
	951	Total 951

Figure 11: Preferred Management Option – Milford Sound Piopiotahi Visitor Activities/Facilities (%)



A supplementary open-ended question allowed for expansion of additional ideas, references or other and comments. Detail from 254 open-ended responses about this theme to be summarised in the Part 2 Survey Report.

## 12. Response Theme – Milford Sound Piopiotahi Accommodation

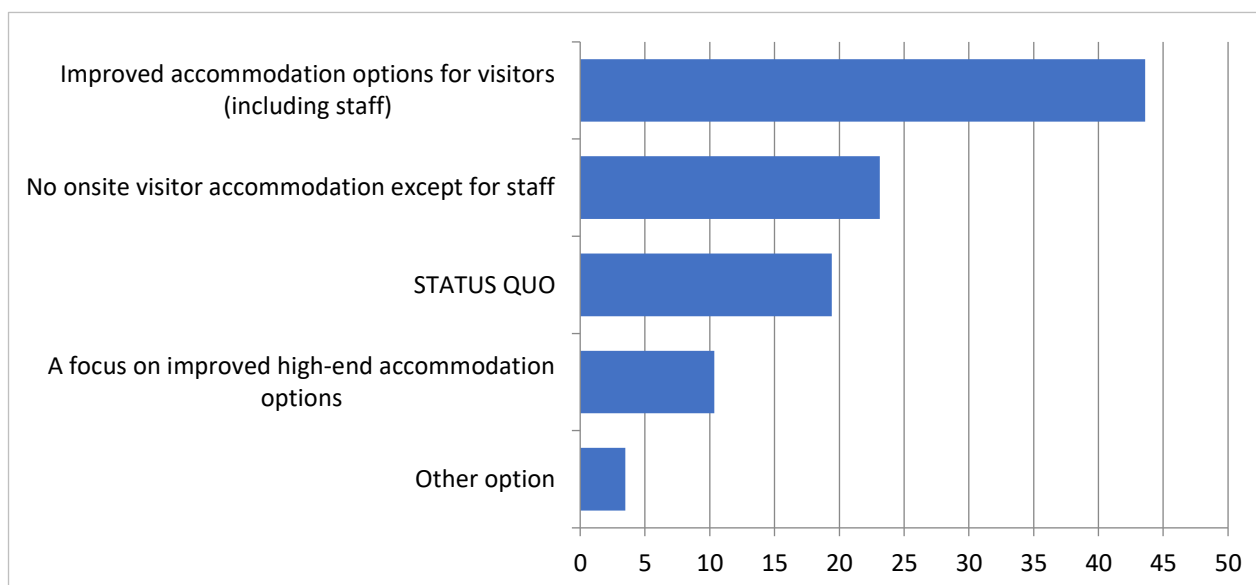
Respondents were asked to tick a box for their most preferred idea option for future management. Table 12 and Figure 12 summarise responses. In Summary, results to date demonstrate:

- only 19% favoured the status quo for accommodation around the village
- of the remaining 81%, most (67%) favoured improvement in accommodation options around the village for visitors and staff, although for many (23%) this was focussed on staff needs only.
- High end accommodation options were not favoured much (10%).
- Very few indicated any ‘Other option’
- **Improved accommodation options were a key theme here, although not so much for high end needs as staff needs.**

Table 12: Preferred Management Option – Milford Sound Piopiotahi Accommodation

	count	%
Improved accommodation options for visitors (including staff)	413	44
No onsite visitor accommodation except for staff	219	23
STATUS QUO	184	19
A focus on improved high-end accommodation options	98	10
Other option	33	3
	947	Total 947

Figure 12: Preferred Management Option – Milford Sound Piopiotahi Accommodation (%)



A supplementary open-ended question allowed for expansion of additional ideas, references or other and comments. Detail from 264 open-ended responses about this theme to be summarised in the Part 2 Survey Report.

### 13. Response Theme – Costs to look after Milford Sound Piopiotahi

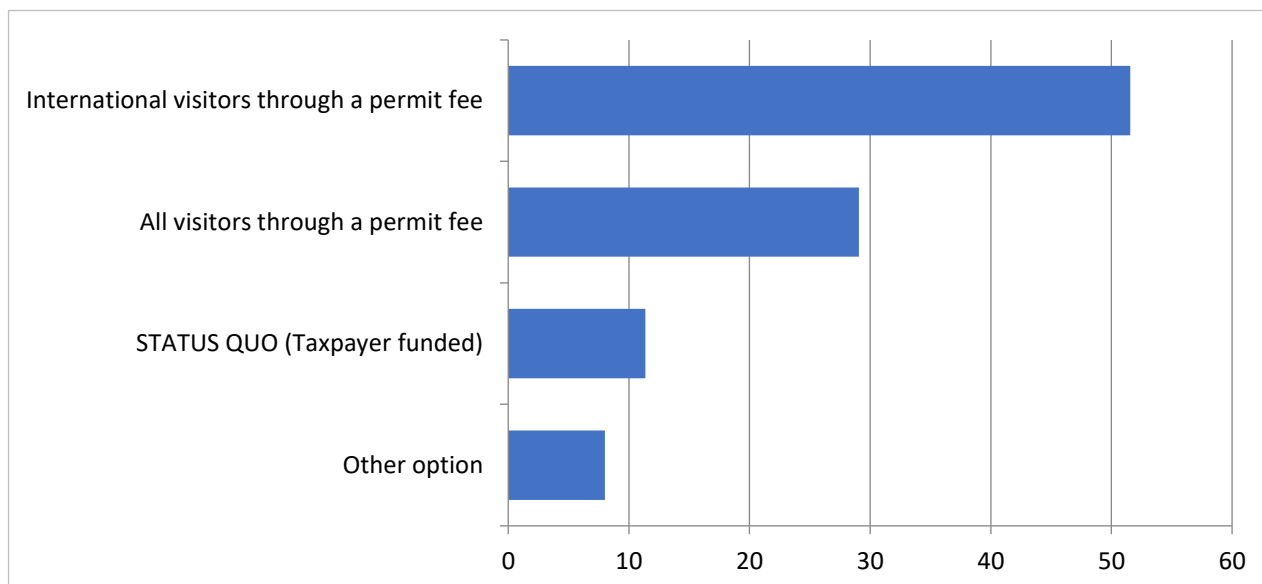
Respondents were asked to tick a box for their most preferred idea option for future management of costs related to looking after Milford Sound Piopiotahi. Table 13 and Figure 13 summarise responses. In Summary, results to date demonstrate:

- only 11% favoured the status quo (taxpayer) sources for most costs and funding of Milford Sound Piopiotahi
- of the remaining 89%, most (52%) favoured more cost recovery through permit fees on international visitors.
- A smaller proportion (29%) favoured permit fees for all visitors.
- of those who specified some ‘Other option’ (8%), most referred to some sort of mixed funding systems. A few also mentioned specific exemptions for locals and/or New Zealanders.
- **More focus upon user-pays appeared a key theme here, particularly with respect to international visitors (and associated providers), although acknowledgment that any systems had to be mixed source.**
- It would be anticipated that the open-ended question responses when analysed will reveal more refined themes.

Table 13: Preferred Management Option – Costs to look after Milford Sound Piopiotahi

	count	%
International visitors through a permit fee	495	52
All visitors through a permit fee	279	29
STATUS QUO (Taxpayer funded)	109	11
Other option	77	8
		Total 960

Figure 13: Preferred Management Option – Costs to look after Milford Sound Piopiotahi (%)



A supplementary open-ended question allowed for expansion of additional ideas, references or other and comments. Detail from 336 open-ended responses about this theme to be summarised in the Part 2 Survey Report.