



VIEWS ON TOURISM PROGRAMME

# VIEWS ON TOURISM: GREAT SOUTH

## FINAL REPORT

JUNE 2025

## KEY INSIGHTS

Murihiku Southland's overall Tourism Approval Rating is 47, which is broadly equivalent to the national benchmark of 48. At this level, tourism sentiment is characterised as 'acceptance' (on a scale that plots sentiment from 'advocacy' at one extreme to 'disapproval' at the other).

Residents of Murihiku Southland view domestic tourism more favourably than they do international tourism, with TAR scores of 64 (for domestic tourism) and 48 (for international tourism) respectively. In this respect, sentiment is similar to that across New Zealand as a whole, although Murihiku Southland residents have a slightly **more favourable view of domestic tourism** than the wider population.

However, the difference in views on domestic and international tourism is reducing. Murihiku Southland's **domestic TAR score has fallen** from 70 in 2022 (when the community sentiment research was first undertaken) to the current 64, while the region's **international TAR score has increased** (from 42 in 2022 to the current 48).

**Murihiku Southland residents have greater exposure to/engagement with tourism than residents of other regions.** Almost all Murihiku Southland residents (93%) have engaged with tourism/visitors in some way over the past two years (compared to 70% of all adult New Zealanders).

**The survey data indicates that the vast majority of Murihiku Southland residents (93%) have personally benefitted from tourism activity in their local area.** This proportion is significantly higher than the New Zealand average (82%). The most commonly observed benefits for residents of Murihiku Southland are opportunities for employment/income and support for local business (more local businesses opening or being able to stay open).

**At the same time, the survey data indicates that the majority of Murihiku Southland residents (83%) have also been adversely impacted by tourism in their local area.** As with benefits, this proportion is significantly higher than the New Zealand benchmark (72%).

The three most commonly cited negative impacts are 'more litter and waste generation' (46% compared to a national average of 30%), 'feel less safe driving' (43% compared to a national average of 20%) and 'damage to the natural environment' (29% compared to a national average of 23%). Southland residents are also more likely to have experienced all other negative impacts measured than residents of other regions.

Residents suggest a **range of practical actions to reduce tourism-related pressures** in Murihiku Southland. **Road safety** is a central concern, with calls for improved road infrastructure, greater enforcement of driving regulations, and stricter requirements for rental vehicle drivers—particularly overseas visitors. Enhanced public transport options, park-and-ride systems, and reducing traffic on high-pressure routes like Milford Road are also suggested as ways to alleviate congestion and mitigate environmental impact.

Feedback indicates that **waste management** also needs attention: with better recycling infrastructure, fines for littering, and stricter freedom camping regulations amongst the range of solutions suggested.

To **protect the natural environment**, residents suggest capping visitor numbers, increasing conservation funding, and preventing over-commercialisation of conservation land. Further actions proposed include regulating short-term accommodation to ease housing pressure, investing in community infrastructure such as water supply and broadband, and ensuring tourism supports rather than overwhelms local services.

## KEY INSIGHTS (CONT.)

**Looking to the future, one third of Murihiku Southland residents (38%) would like the local tourism industry to focus most strongly on improving community infrastructure.** Other priorities include creating employment for people in the community (28%), attracting more domestic visitors (26%), encouraging visitors to travel more widely so that more communities benefit (24%) and attracting higher quality visitors (22%).

### **Additional comments regarding tourism in Southland**

While tourism brings economic benefits, some residents feel it has compromised their quality of life. Concerns include limited access to local attractions due to crowding or high costs, noise pollution from helicopters and boats, and inflated living costs. Residents also express frustration at the lack of affordable housing, as short-term rentals reduce availability and push up prices.

There are calls for local discounts, ratepayer concessions, and dedicated access opportunities to make tourism more inclusive for residents. Others call for a more diversified local economy with less dependence on low-value, seasonal tourism jobs and more investment in sustainable, higher-value industries.

A common theme is the desire for a more balanced, community-focused approach that preserves both the environment and local wellbeing.

### **Conclusion**

This second tranche of the Views on Tourism research reinforces positive attitudes towards tourism in Murihiku Southland – and increasingly positive attitudes in relation to **international tourism** in the region – but also some ‘pain points’. These are felt most strongly by residents of Fiordland.

While recognising that there is a need to address these ‘negative externalities’ of tourism – most notably, issues relating to road safety, litter/waste management, protection of the natural environment, and housing affordability and supply – it is significant that residents of Murihiku Southland also support the sector’s growth.

**Eighty-six percent of the region’s residents see the benefits that tourism brings to Murihiku Southland and would like to see tourism grow. Of this group, almost 60% advocate for well-managed growth and some increase in visitors; the remaining 40% would like to see a significant increase in tourism development.**



## METHODOLOGY

This report details the findings of research undertaken in Murihiku Southland in April/May 2025. The research used Angus & Associates' Views on Tourism© research methodology as a base. Core questions designed to measure resident opinion on the value of international and domestic tourism, and the extent to which tourism is impacting the community (both from positive and negative perspectives) were supplemented with one question specific to the region (appetite for tourism development/growth).

In this report, Murihiku Southland residents' views on tourism and its impacts are compared with those of a nationally-representative sample of New Zealand residents (the 'NZ Benchmark'). This national sample comprises n=3,027 New Zealanders aged 18 years or more who completed the Views on Tourism© survey in the year ending April 2025 (the closest comparable period).

This study engaged 390 residents of Murihiku Southland aged 15 years or more, using a combination of in-person and online recruitment methods to reach a wide and diverse cross-section of the population. The primary recruitment strategy involved intercepts at a variety of public locations throughout Murihiku Southland. These included informal and high-traffic sites such as bakeries, community events, markets, and the regional airport. An experienced Angus & Associates field researcher conducted this in-region intercept. Site selection was designed to ensure geographic and demographic diversity, capturing input from communities across the Murihiku Southland, including Invercargill, Te Anau, and other communities across the region. At the time of approach, individuals could complete the survey on the spot or opt to receive a link by email.

Participants were given the choice of using a tablet provided by the fieldworker or scanning a QR code to complete the survey on their own device. This flexible approach was intended to remove barriers to participation and accommodate different preferences. To further boost reach and inclusiveness, the survey was also promoted through community networks and social media platforms. Local businesses were invited to support the project by sharing a QR code linking to the survey registration page with staff and customers.

As an added incentive and acknowledgement of contribution, survey participants were entered into a draw to win a \$250 Prezzy card.

The survey closed on 11 May 2025 and, following quality control and data cleaning procedures, the final survey sample was weighted to reflect the characteristics of Murihiku Southland's adult population, with regards to age, gender and sub-areas - using 2018 Census NZ data as a reference.

### Tourism Approval Rating

A Tourism Approval Rating (TAR) is calculated for both international and domestic tourism, using a combination of tourism perception scores. The TAR is plotted on a six-section scale (Advocacy, Approval, Acceptance, Limited Acceptance, Threatened Acceptance and Disapproval) to highlight residents' perceptions of tourism on an ongoing basis.

The symbols ▲ and ▼ are used throughout the report to indicate where Murihiku Southland results are significantly higher / lower than the New Zealand benchmark. Significant differences are calculated at the 95% confidence level.



**VIEWS ON TOURISM  
SNAPSHOT**

# VIEWS ON TOURISM SNAPSHOT: MURIHIKU SOUTHLAND RESIDENTS

Research was conducted between April-May 2025 using Angus & Associates [Views on Tourism](#)© methodology. The sample includes n=390 Southland residents aged 15+ years.

## TOURISM APPROVAL RATING (TAR)

TAR score highlights residents' overall perceptions of tourism

### Overall TAR:

Murihiku Southland	<b>47</b>
New Zealand	<b>48</b>

### International TAR:

Murihiku Southland	<b>48</b>
New Zealand	<b>48</b>

### Domestic TAR:

Murihiku Southland	<b>64</b>
New Zealand	<b>58</b>



**93% of Southland residents have experienced the benefits of tourism activity in their area, and the top 5 are...**

- 1 Opportunities for employment & income
- 2 More local businesses opening, or being able to stay open
- 3 Opportunities to get involved with/attend local festivals and cultural events
- 4 Opportunities to learn more about other cultures
- 5 Has enhanced the profile or identity of my/our area

**83% of Southland residents have experienced adverse impacts of tourism activity in their area, and the top 5 are...**

- 1 More litter and waste generation
- 2 Feel less safe driving
- 3 Damage to the natural environment
- 4 Local attractions, landmarks and/or events are too expensive for me/my family to visit
- 5 Takes longer to get to places due to traffic/congestion

### Top 5 areas of focus for local tourism industry in the future...



Improving community infrastructure



Reducing the impact of visitors on local environment



Attracting more domestic visitors



Encouraging visitors to travel more widely so that more communities benefit



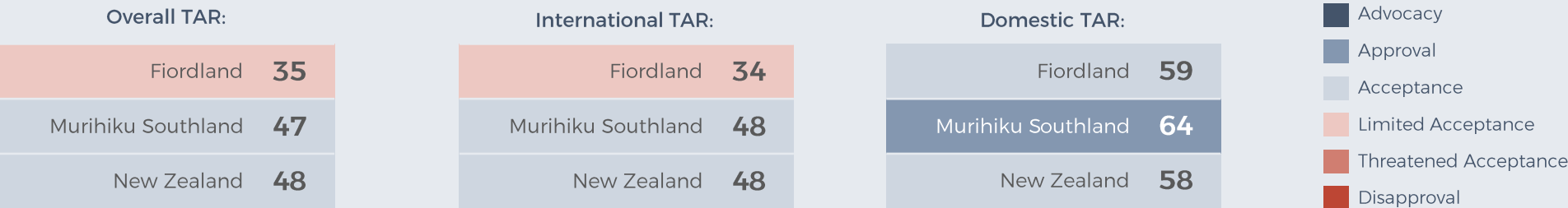
Attracting higher quality visitors

# VIEWS ON TOURISM SNAPSHOT: FIORDLAND RESIDENTS

Research was conducted between April-May 2025 using Angus & Associates [Views on Tourism](#)® methodology. The sample includes n=166 Fiordland residents aged 15+ years.

## TOURISM APPROVAL RATING (TAR)

TAR score highlights residents' overall perceptions of tourism



98% of Fiordland residents have experienced the benefits of tourism activity in their area, and the top 5 are...

- 1 More local businesses opening, or being able to stay open
- 2 Opportunities for employment/income
- 3 A greater variety of goods and services being available than otherwise would be
- 4 My/our community is a more vibrant and friendly place to live
- 5 Has enhanced the profile or identity of my/our area

97% of Fiordland residents have experienced adverse impacts of tourism activity in their area, and the top 5 are...

- 1 Feel less safe driving
- 2 More litter and waste generation
- 3 Too much pressure on community infrastructure
- 4 Tourism activity means that the availability of housing has decreased
- 5 My community is too reliant on tourism, causing significant impacts as the sector grows or declines

### Top 5 areas of focus for local tourism industry in the future...



Encouraging visitors to travel outside of the peak season



Encouraging visitors to adopt more sustainable travel practices



Attracting higher quality visitors



Improving community infrastructure



Reducing the impact of visitors on local environment

# VIEWS ON TOURISM SNAPSHOT: RESIDENTS OF SOUTHLAND (EXCL. FIORDLAND)

Research was conducted between April-May 2025 using Angus & Associates [Views on Tourism](#) methodology. The sample includes n=224 residents of Southland (excl. Fiordland) aged 15+ years.

## TOURISM APPROVAL RATING (TAR)

TAR score highlights residents' overall perceptions of tourism

### Overall TAR:

Southland (excl. Fiordland)	<b>48</b>
Murihiku Southland	<b>47</b>
New Zealand	<b>48</b>

### International TAR:

Southland (excl. Fiordland)	<b>48</b>
Murihiku Southland	<b>48</b>
New Zealand	<b>48</b>

### Domestic TAR:

Southland (excl. Fiordland)	<b>64</b>
Murihiku Southland	<b>64</b>
New Zealand	<b>58</b>



**93% of the residents have experienced the benefits of tourism activity in their area, and the top 5 are...**

- 1 Opportunities for employment & income
- 2 More local businesses opening, or being able to stay open
- 3 Opportunities to get involved with/attend local festivals and cultural events
- 4 Opportunities to learn more about other cultures
- 5 Has inspired me/us to travel domestically

**83% of the residents have experienced adverse impacts of tourism activity in their area, and the top 5 are...**

- 1 More litter and waste generation
- 2 Feel less safe driving
- 3 Damage to the natural environment
- 4 Local attractions, landmarks and/or events are too expensive for me/my family to visit
- 5 Takes longer to get to places due to traffic/congestion

### Top 5 areas of focus for local tourism industry in the future...



Improving community infrastructure



Creating employment for people in my community



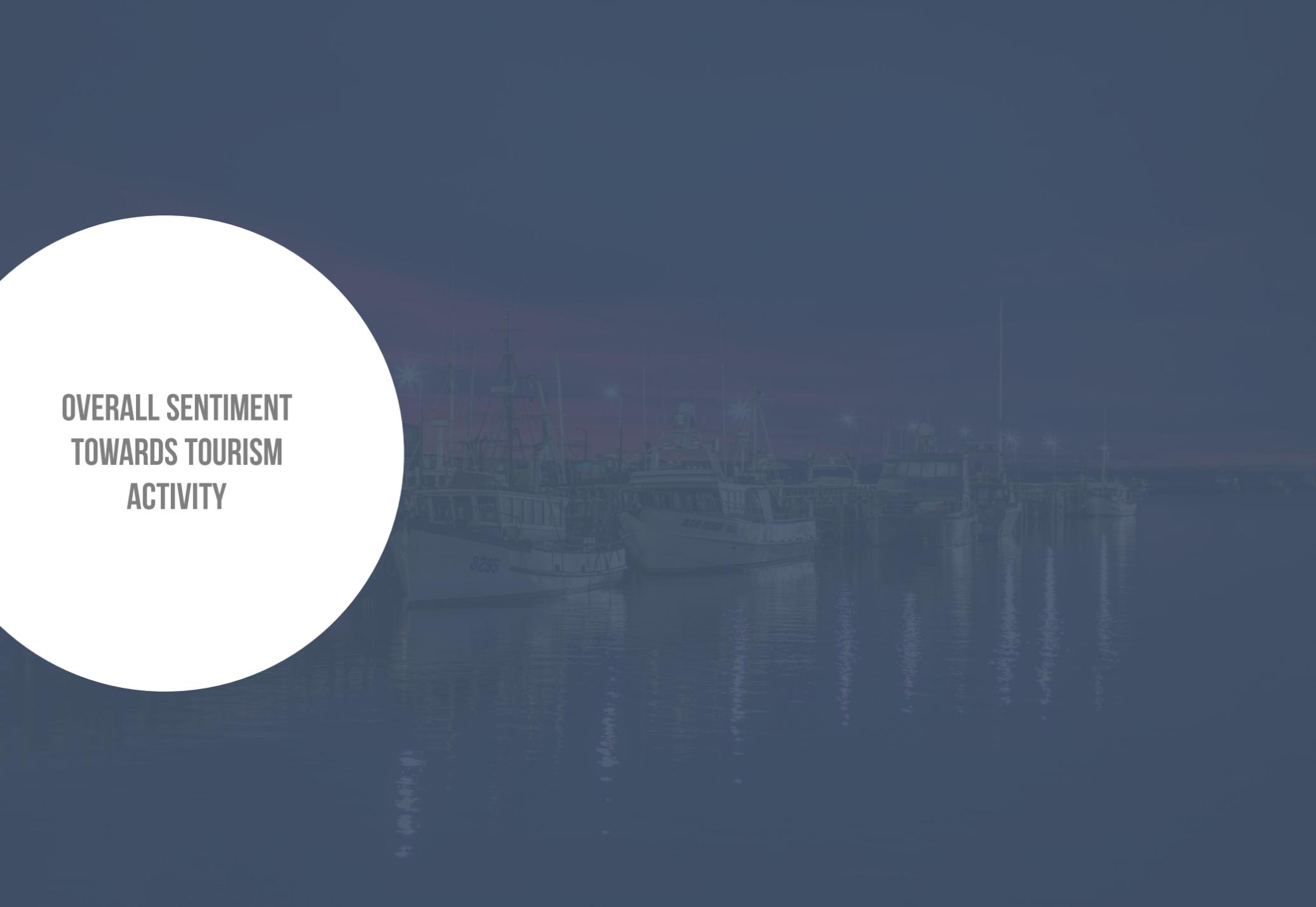
Attracting more domestic visitors



Encouraging visitors to travel more widely so that more communities benefit



Attracting higher quality visitors



**OVERALL SENTIMENT  
TOWARDS TOURISM  
ACTIVITY**

VIEWS ON TOURISM: GREAT SOUTH

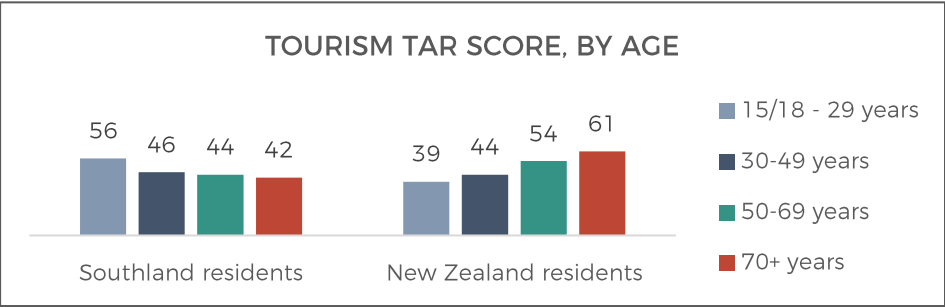
TOURISM - OVERALL

Compared to New Zealand residents overall, Murihiku Southland residents are more likely to acknowledge the benefits of tourism in their region, but they are also significantly more likely to express concern about the pressure exerted by visitors (both on the country as a whole and on their region). Murihiku Southland's overall TAR score is 47, compared with 48 for New Zealand.

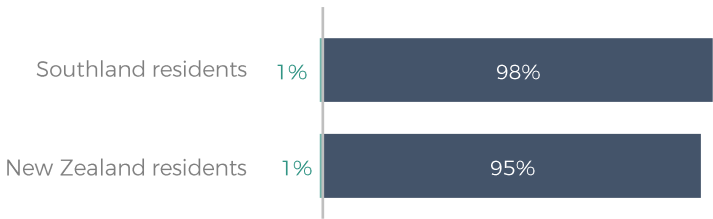
At this level (47), sentiment in relation to tourism is characterised as 'acceptance'.

Views on tourism 'overall' align most closely with sentiment towards international tourism, suggesting that when Southland residents (and New Zealand residents generally) think about "tourism" their thoughts gravitate more toward inbound than domestic visitors.

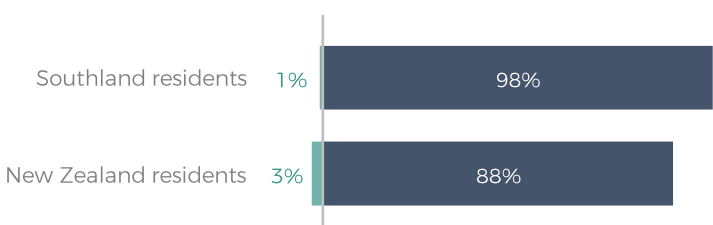
By age group, young people in Murihiku Southland are more likely to view tourism favourably. This is the reverse of the pattern seen across the country as a whole.



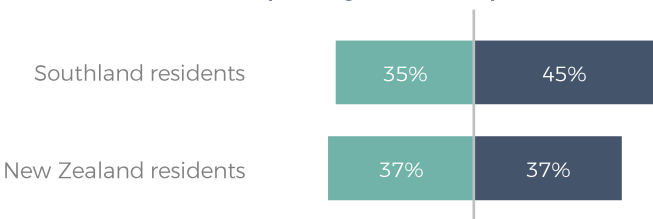
Tourism is good for New Zealand



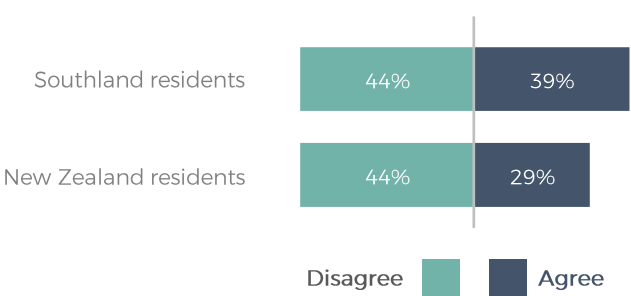
Tourism is good for my region



Visitors are putting too much pressure on New Zealand



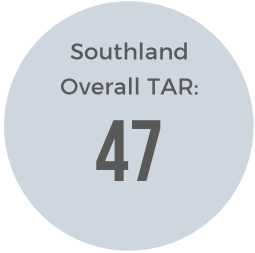
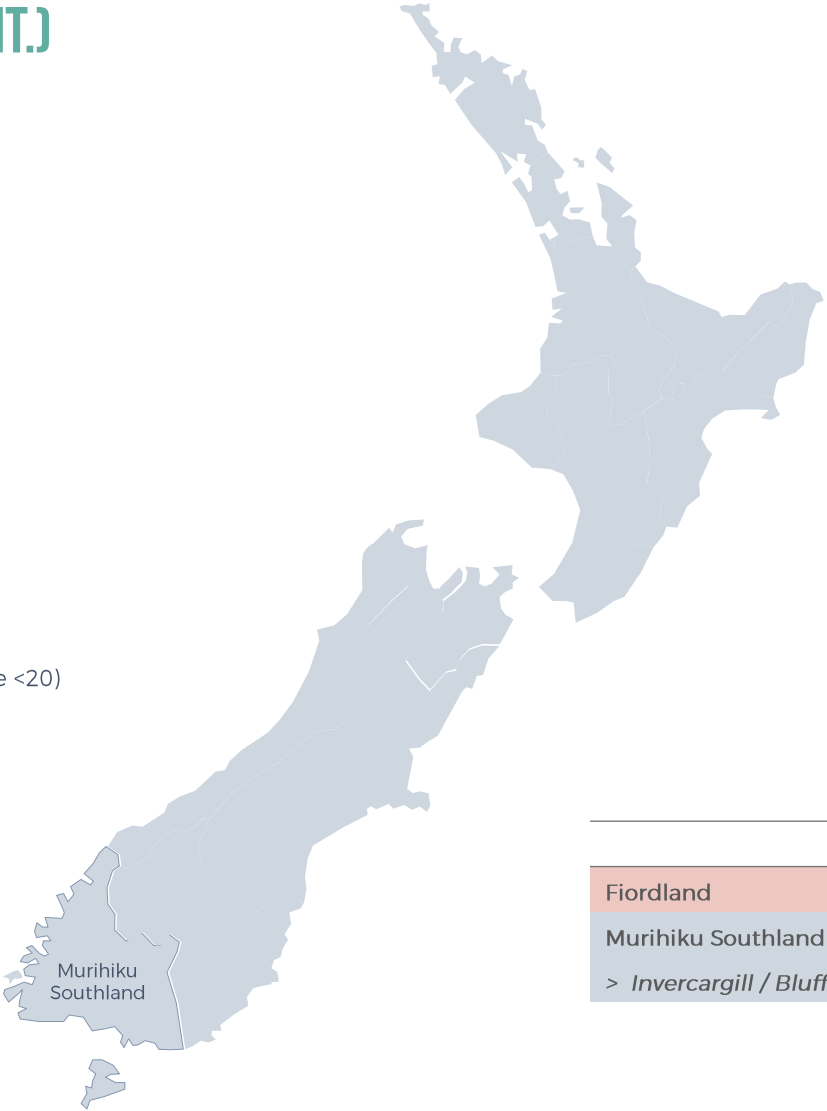
Visitors are putting too much pressure on my region



VIEWS ON TOURISM: GREAT SOUTH

# TOURISM – OVERALL (CONT.)

- Advocacy
- Approval
- Acceptance
- Limited Acceptance
- Threatened Acceptance
- Disapproval
- Excluded (small sample size <20)



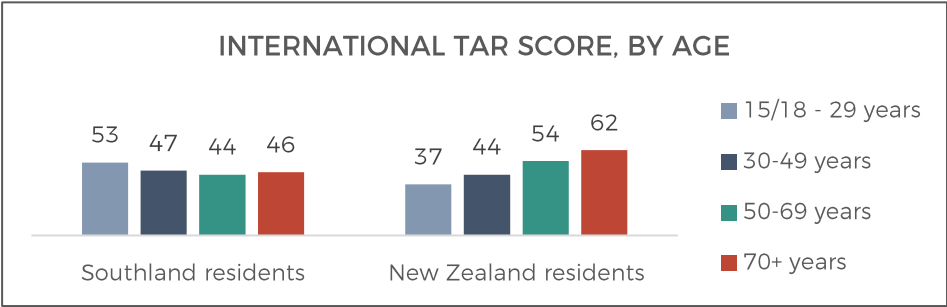
	TAR Score
Fiordland	35
Murihiku Southland (excl. Fiordland)	48
> Invercargill / Bluff	54

VIEWS ON TOURISM: GREAT SOUTH  
 INTERNATIONAL TOURISM

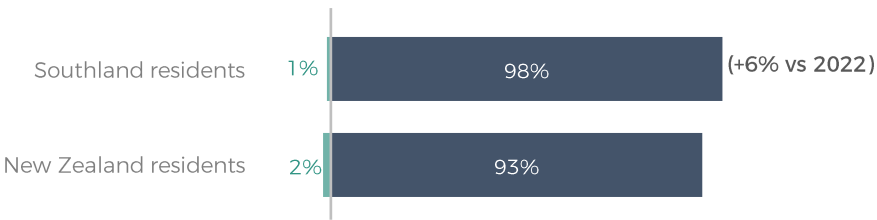
Murihiku Southland residents almost unanimously agree that international tourism is good for New Zealand and for their region. Furthermore, they are significantly more likely to see international tourism as good for their region than are residents of New Zealand as a whole - 97% vs 88%.

Despite this widespread acknowledgement of the benefits of international tourism, 45% of Murihiku Southland residents also feel that international visitors put too much pressure on New Zealand, and 40% believe that international visitors put too much pressure on their region. These proportions are considerably higher than the equivalent New Zealand benchmarks.

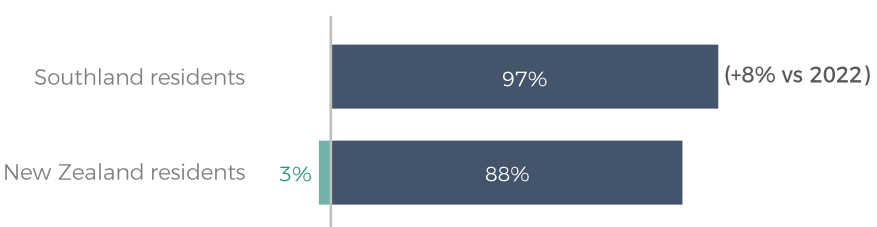
The international TAR score of 48 is broadly equivalent to that for 'tourism overall' (47).



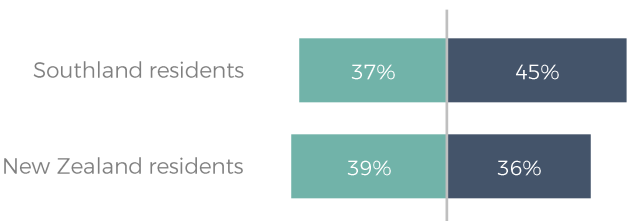
International tourism is good for New Zealand



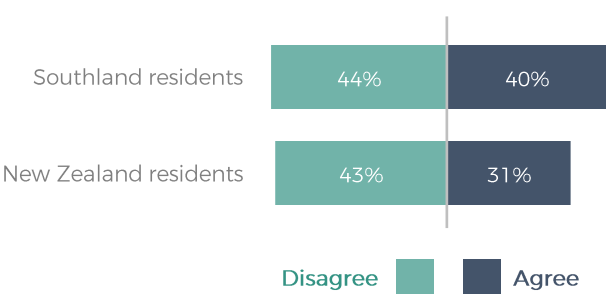
International tourism is good for my region



International visitors are putting too much pressure on New Zealand



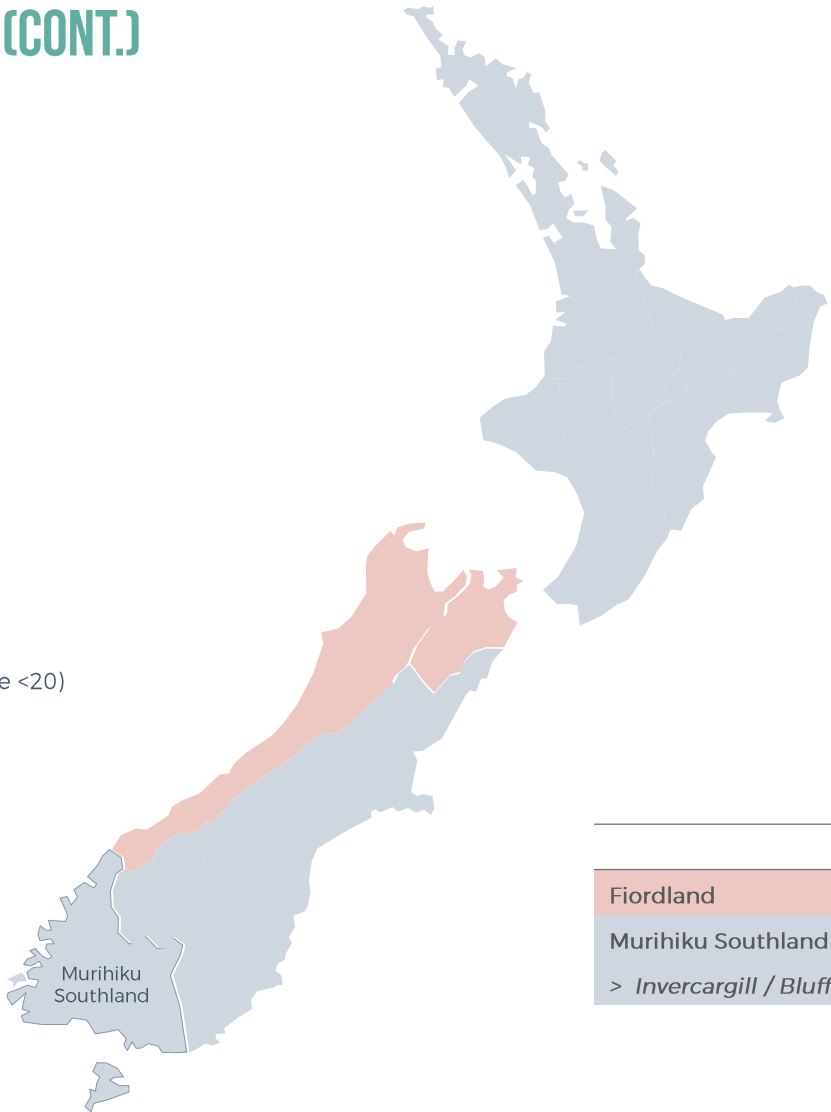
International visitors are putting too much pressure on my region



VIEWS ON TOURISM: GREAT SOUTH

# INTERNATIONAL TOURISM (CONT.)

- Advocacy
- Approval
- Acceptance
- Limited Acceptance
- Threatened Acceptance
- Disapproval
- Excluded (small sample size <20)



	TAR Score
Fiordland	34
Murihiku Southland (excl. Fiordland)	48
> Invercargill / Bluff	54

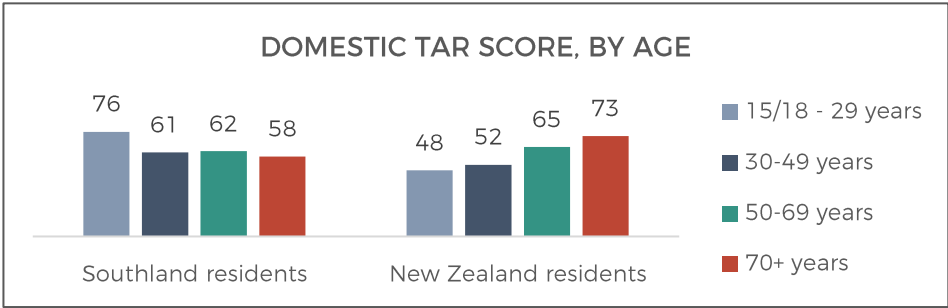
VIEWS ON TOURISM: GREAT SOUTH

DOMESTIC TOURISM

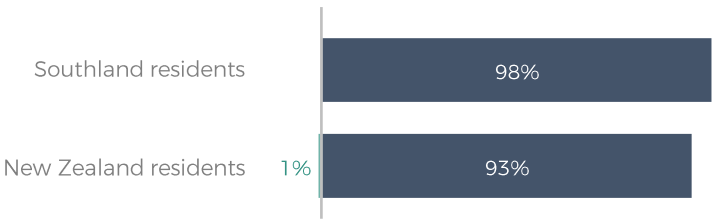
Murihiku Southland residents have a more favourable view of domestic than international tourism and, despite a drop since 2022 (from 70 to 64), the region's domestic TAR score is still substantially higher than that for New Zealand as a whole (58).

New Zealand benchmark data indicates that support for domestic tourism generally increases with age, but this is not the case amongst residents of Southland (with a very high TAR score of 76 in the 15-29 year age group).

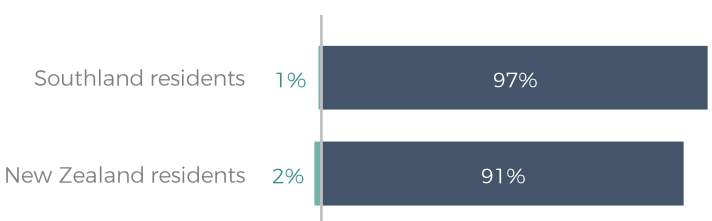
Residents employed in the tourism sector tend to view tourism activity more favourably than their peers, with a domestic TAR score of 75 amongst this group.



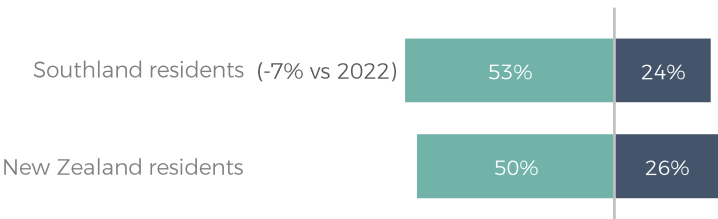
Domestic tourism is good for New Zealand



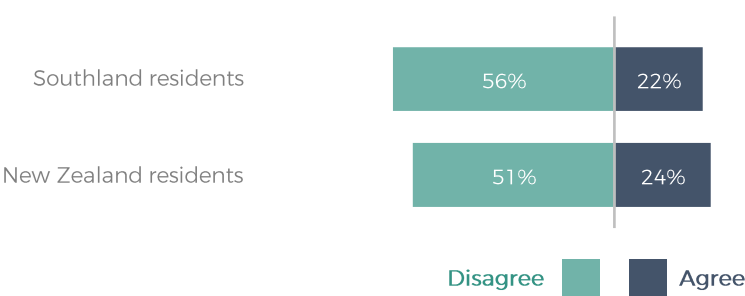
Domestic tourism is good for my region



Domestic visitors are putting too much pressure on New Zealand

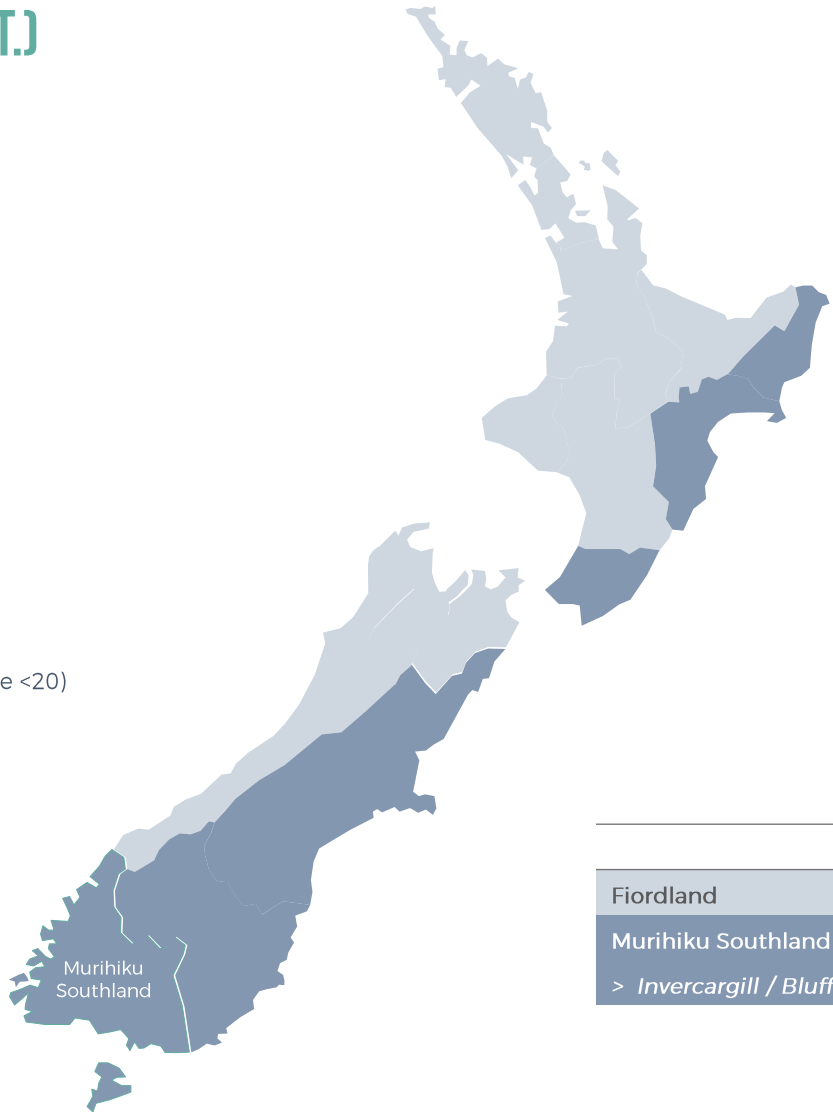
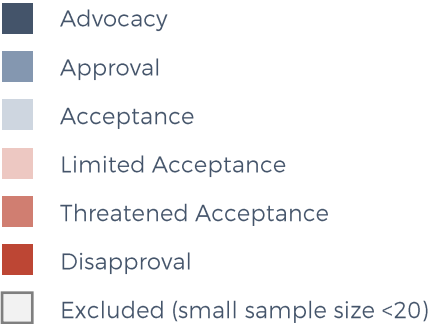


Domestic visitors are putting too much pressure on my region



VIEWS ON TOURISM: GREAT SOUTH

# DOMESTIC TOURISM (CONT.)



(-6 vs 2022)

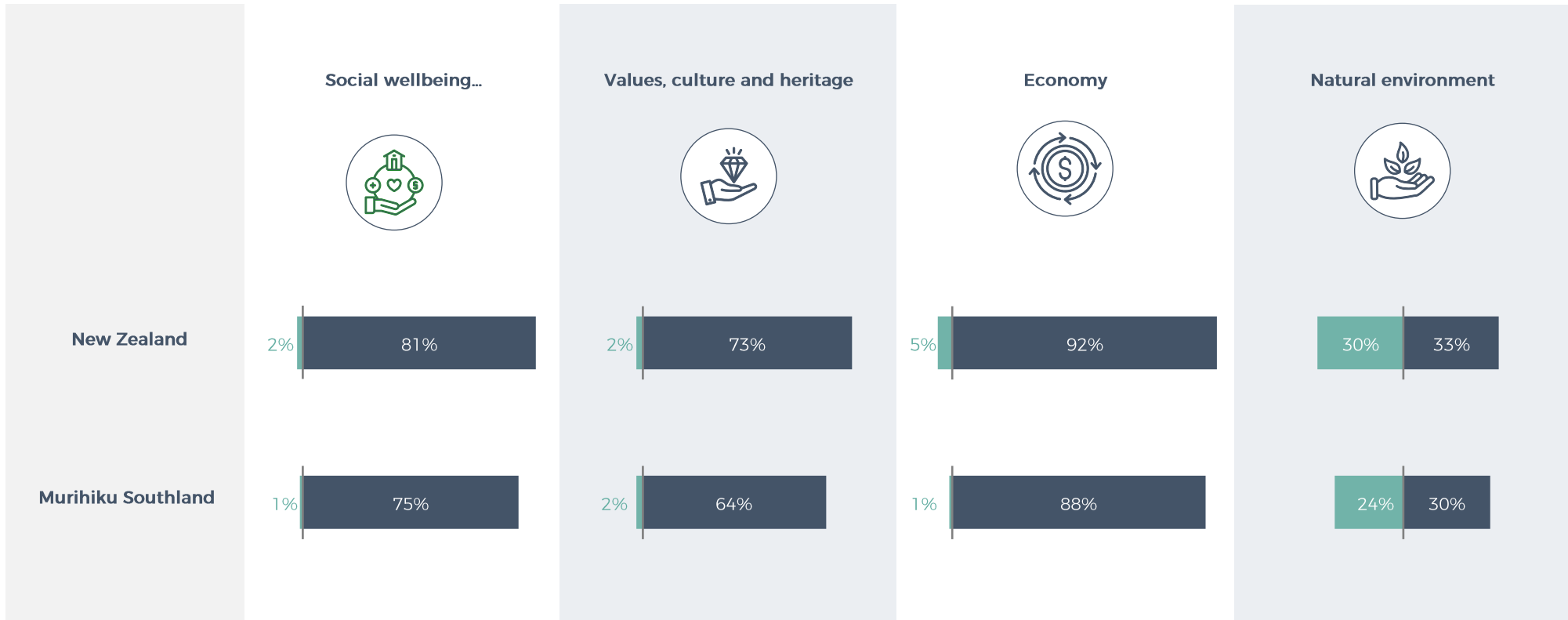
	TAR Score
Fiordland	59
Murihiku Southland (excl. Fiordland)	64
> Invercargill / Bluff	66

A dark, atmospheric photograph of several fishing boats docked in a harbor at night. The boats are illuminated by their own lights and the harbor lights, with their reflections visible in the calm water. The sky is a deep twilight blue. A large white circle is overlaid on the left side of the image, containing the text.

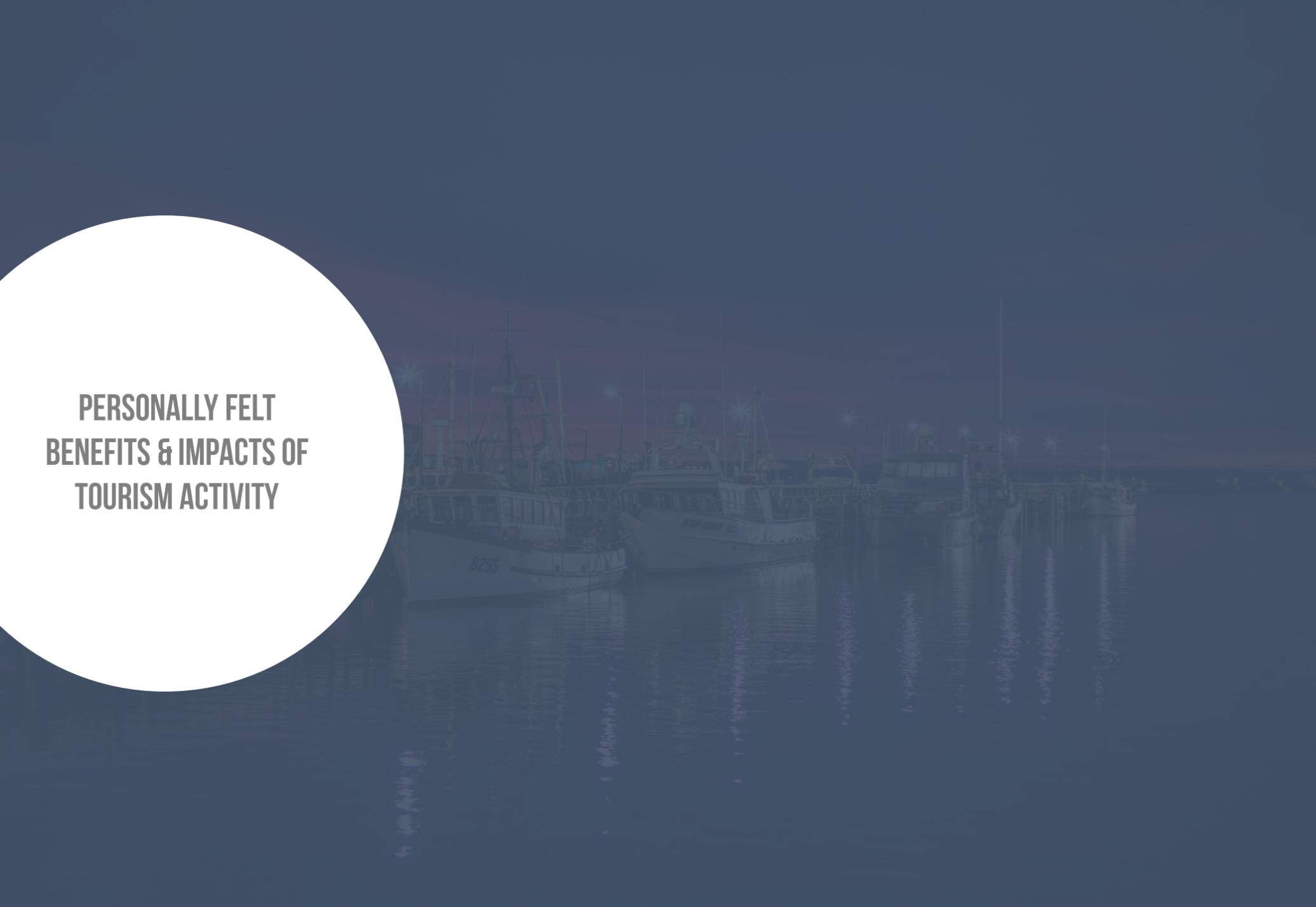
**SOCIAL, CULTURAL,  
ECONOMIC &  
ENVIRONMENTAL  
IMPACTS**

# POSITIVE / NEGATIVE IMPACTS OF TOURISM

Thinking about the positive or negative impacts of tourism, what impact would you say tourism has on...?



Negative\* Positive\*

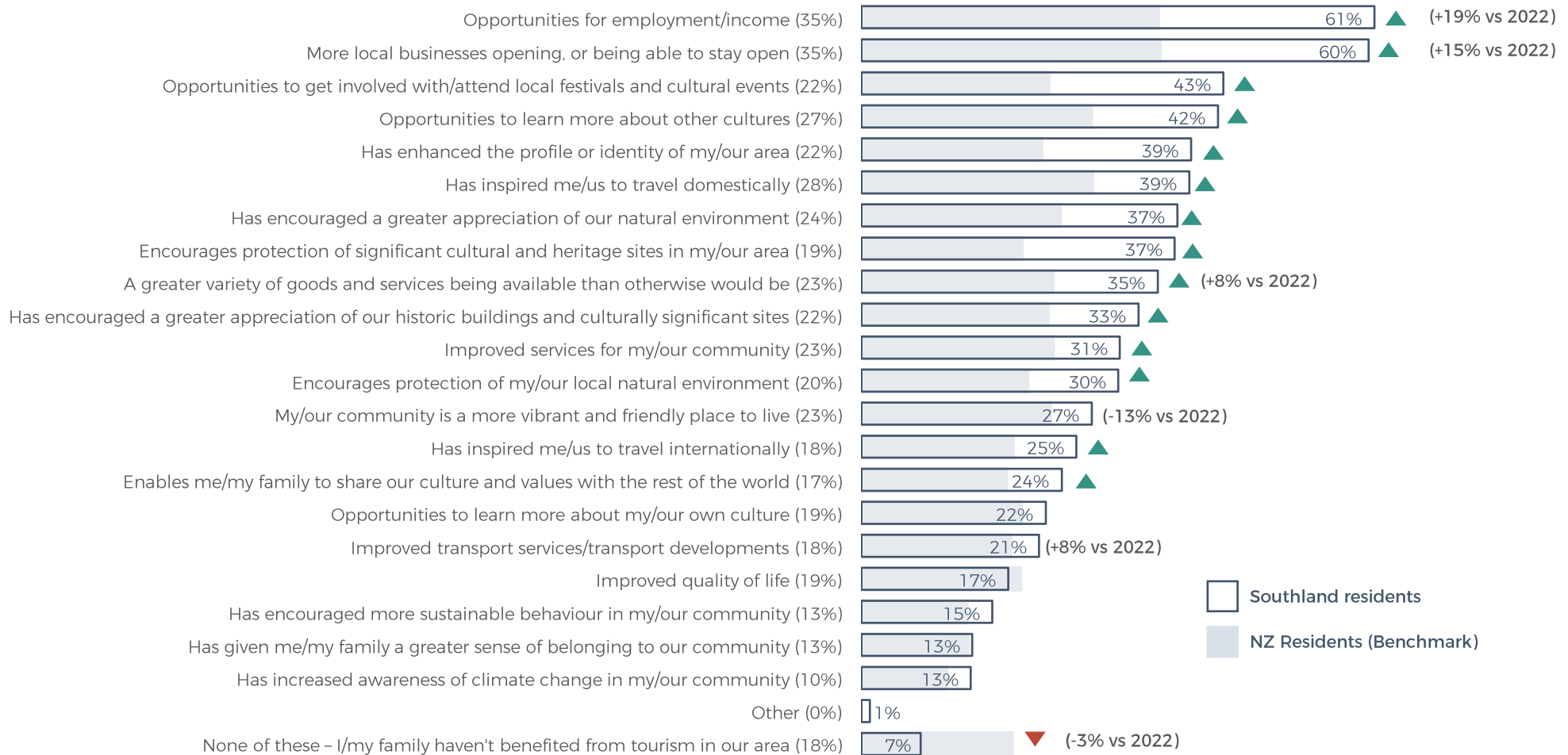


**PERSONALLY FELT  
BENEFITS & IMPACTS OF  
TOURISM ACTIVITY**

## BENEFITS FROM TOURISM IN LOCAL AREA (VS. NZ BENCHMARK)

In which of the following ways, if any, would you say you/your family benefit from tourism activity in your local area?

(% of NZ residents who have experienced benefit)



## VIEWS ON TOURISM: GREAT SOUTH

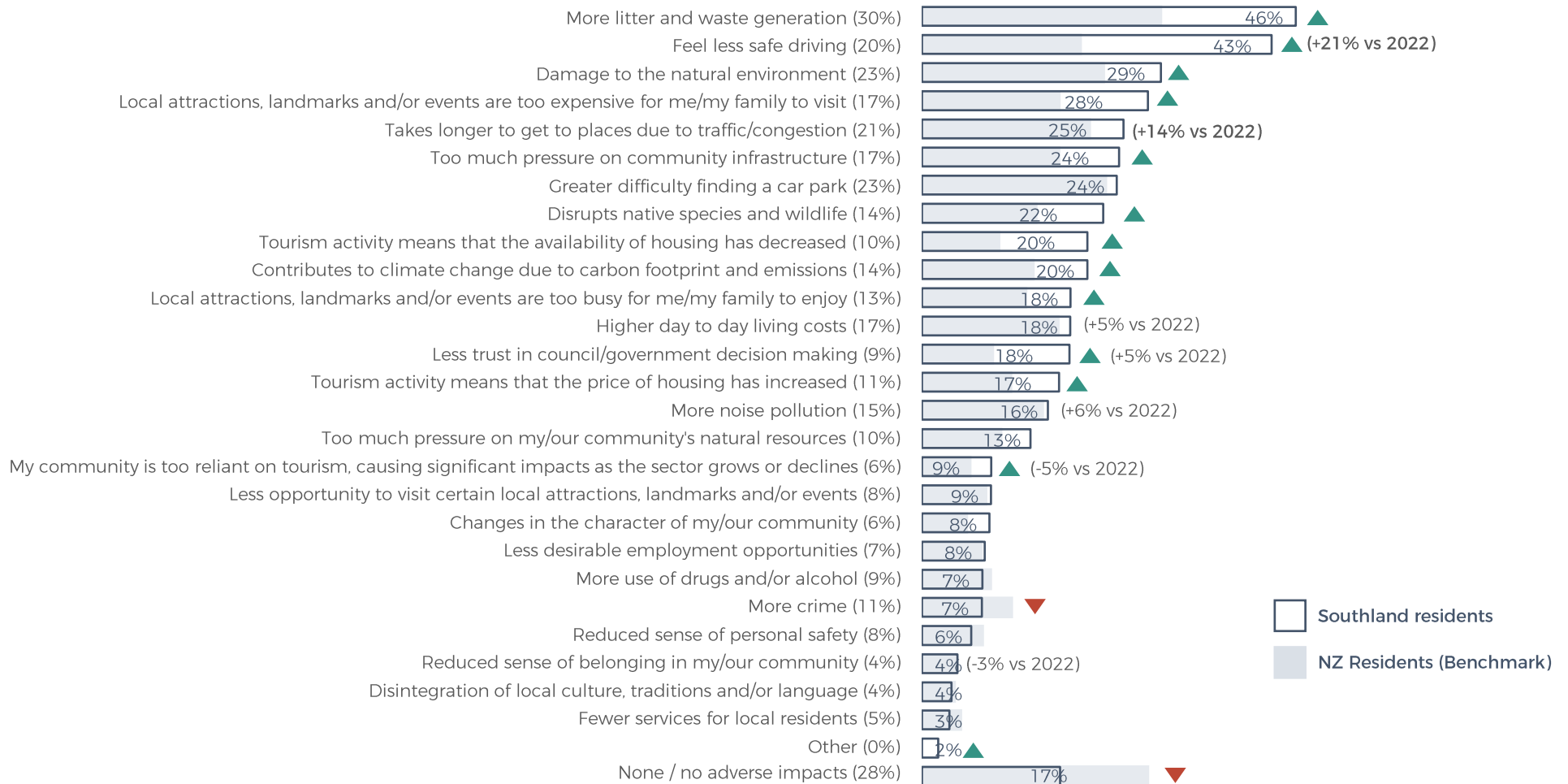
# BENEFITS FROM TOURISM IN LOCAL AREA

	Fiordland	Rest of Southland	Murihiku Southland (Total)	NZ (Benchmark)
Opportunities for employment/income	73%	60%	61%	35%
More local businesses opening, or being able to stay open	78%	59%	60%	35%
Opportunities to get involved with/attend local festivals and cultural events	26%	44%	43%	22%
Opportunities to learn more about other cultures	41%	42%	42%	27%
Has enhanced the profile or identity of my/our area	53%	38%	39%	22%
Has inspired me/us to travel domestically	46%	38%	39%	28%
Has encouraged a greater appreciation of our natural environment	45%	37%	37%	24%
Encourages protection of significant cultural and heritage sites in my/our area	29%	37%	37%	19%
A greater variety of goods and services being available than otherwise would be	58%	34%	35%	23%
Has encouraged a greater appreciation of our historic buildings and culturally significant sites	16%	34%	33%	22%
Improved services for my/our community	51%	30%	31%	23%
Encourages protection of my/our local natural environment	33%	30%	30%	20%
My/our community is a more vibrant and friendly place to live	56%	26%	27%	23%
Has inspired me/us to travel internationally	38%	25%	25%	18%
Enables me/my family to share our culture and values with the rest of the world	36%	23%	24%	17%
Opportunities to learn more about my/our own culture	17%	22%	22%	19%
Improved transport services/transport developments	31%	21%	21%	18%
Improved quality of life	37%	16%	17%	19%
Has encouraged more sustainable behaviour in my/our community	30%	15%	15%	13%
Has given me/my family a greater sense of belonging to our community	26%	13%	13%	13%
Has increased awareness of climate change in my/our community	21%	13%	13%	10%
Other	0%	1%	1%	0%
None of these – I/my family haven't benefited from tourism in our area	2%	7%	7%	18%
Base: n=	166	224	390	3027

## NEGATIVE IMPACTS FROM TOURISM IN LOCAL AREA (VS. NZ BENCHMARK)

In which of the following ways, if any, would you say you/your family are negatively impacted by tourism in your local area?

(% of NZ residents who have experienced negative impact)

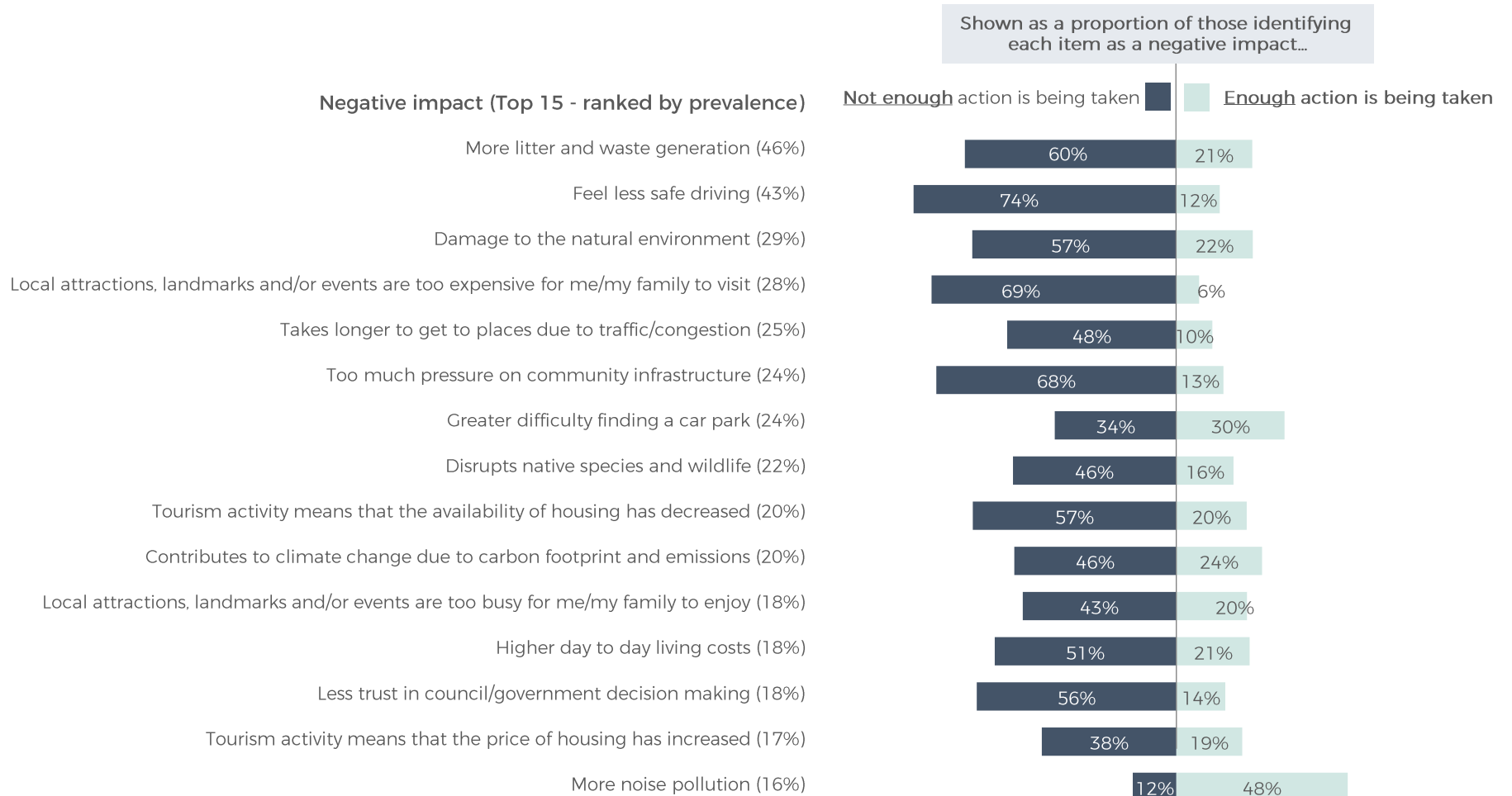


## NEGATIVE IMPACTS FROM TOURISM IN LOCAL AREA

	Fiordland	Rest of Southland	Murihiku Southland (Total)	NZ (Benchmark)
More litter and waste generation	62%	45%	46%	30%
Feel less safe driving	71%	42%	43%	20%
Damage to the natural environment	46%	29%	29%	23%
Local attractions, landmarks and/or events are too expensive for me/my family to visit	33%	28%	28%	17%
Takes longer to get to places due to traffic/congestion	36%	24%	25%	21%
Too much pressure on community infrastructure	54%	23%	24%	17%
Greater difficulty finding a car park	43%	23%	24%	23%
Disrupts native species and wildlife	32%	22%	22%	14%
Tourism activity means that the availability of housing has decreased	49%	19%	20%	10%
Contributes to climate change due to carbon footprint and emissions	28%	20%	20%	14%
Local attractions, landmarks and/or events are too busy for me/my family to enjoy	31%	18%	18%	13%
Higher day to day living costs	44%	17%	18%	17%
Less trust in council/government decision making	16%	18%	18%	9%
Tourism activity means that the price of housing has increased	41%	16%	17%	11%
More noise pollution	27%	15%	16%	15%
Too much pressure on my/our community's natural resources	26%	13%	13%	10%
My community is too reliant on tourism	46%	7%	9%	6%
Less opportunity to visit certain local attractions, landmarks and/or events	20%	8%	9%	8%
Changes in the character of my/our community	17%	8%	8%	6%
Less desirable employment opportunities	23%	7%	8%	7%
More use of drugs and/or alcohol	11%	7%	7%	9%
More crime	9%	7%	7%	11%
Reduced sense of personal safety	6%	6%	6%	8%
Reduced sense of belonging in my/our community	6%	4%	4%	4%
Disintegration of local culture, traditions and/or language	5%	4%	4%	4%
Fewer services for local residents	6%	3%	3%	5%
Other	3%	1%	2%	0%
None of these – I/my family haven't experienced any adverse impacts	3%	17%	17%	28%
Base: n=	166	224	390	3027

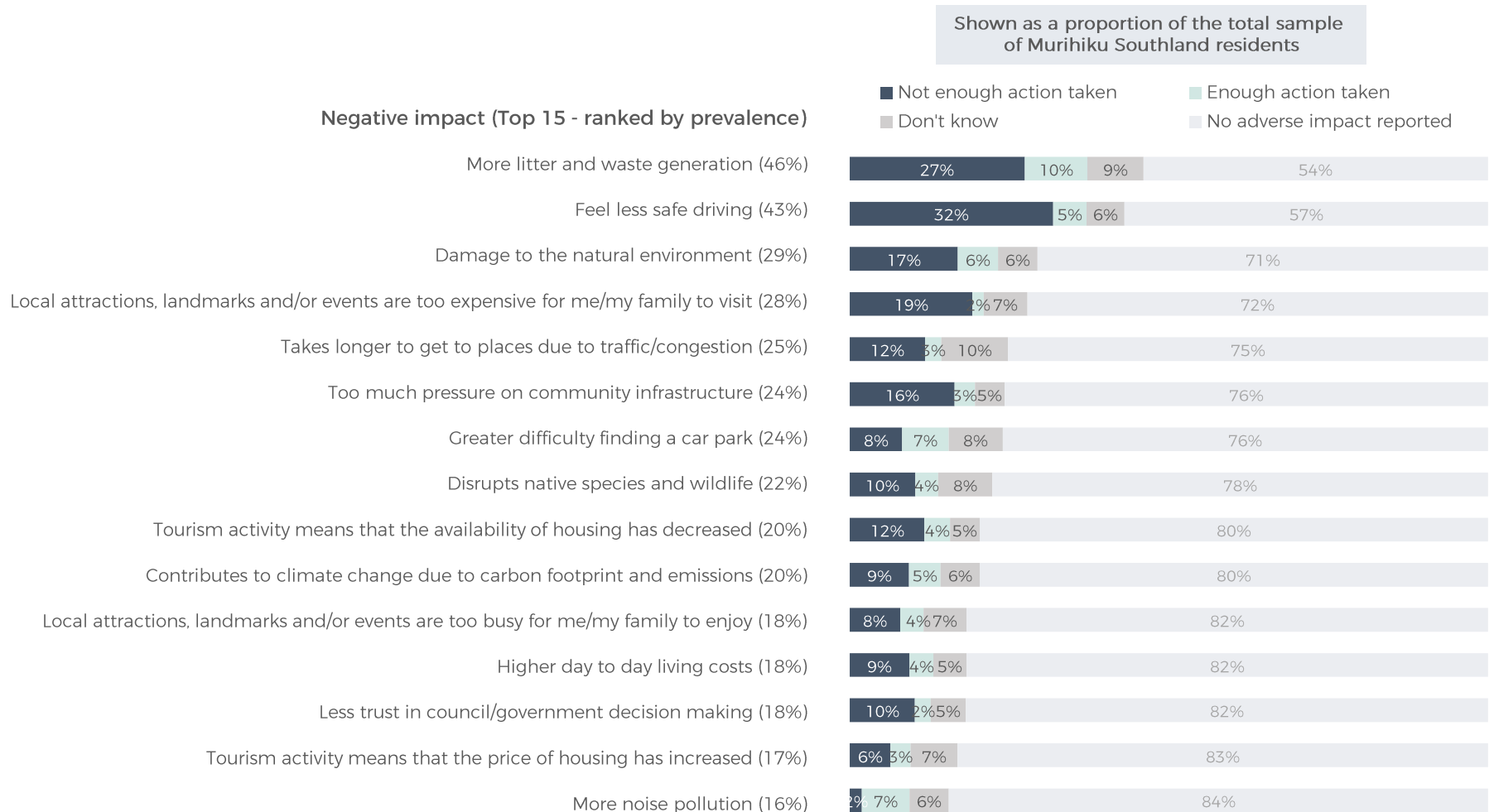
## ACTION BEING TAKEN TO ADDRESS NEGATIVE IMPACTS OF TOURISM

Thinking about the areas in which tourism has negatively impacted you/your family, would you say that...?



## ACTION BEING TAKEN TO ADDRESS NEGATIVE IMPACTS OF TOURISM (CONT.)

Thinking about the areas in which tourism has negatively impacted you/your family, would you say that...?



## IDEAS FOR BETTER ADDRESSING NEGATIVE IMPACTS OF TOURISM

[Of those who have been negatively impacted by tourism activity in their local area and strongly disagree or disagree that enough action is being taken to address these] What more do you think could be done?

### SAFER DRIVING

"Improve the roads with median barriers and more places to pass, increased policing on Milford Road."

"Some overseas drivers shouldn't be on the road. Why are they allowed to drive?"

"More policing of bad driving. Lower speed limits. Better roads with more passing bays."

"Stop rental cars from doing more than 500km a day. Somehow stop phone distractions from killing us."

"Need more interventions with regular checks by pulling over tourist operators to ensure they have the correct licenses and permits to operate. It appears to be only done once per year."

"Tourism authorities should actively/only promote tourism where they don't use personal vehicles."

"I've seen crazy passing on this section of road. There are often police there which is good, but can't there be barriers put on middle line so no-one can pass at all? Do tourists know that you can't pass on a yellow line? More arrows on correct driving side of roads needed everywhere, particularly after pullover spots e.g. Devil's Staircase lookout, Roaring Meg etc Mossburn/ Frankton."

"Rental vehicle companies need to assume great responsibility for allowing drivers who are not familiar with New Zealand roads. Possibly create more jobs for local drivers or better public transport system."

"Driver training before they can get mobile."

"There need to be real penalties for dangerous driving."

All foreigners need to do a day license on our road rules, before being let loose with rental cars, motorhomes etc."

"Reduce traffic on Milford Road. Motor home renting outlets should stress importance of looking in rear vision mirrors and pulling over, stress extra time required to drive toads such as Milford."

"The information kiosk on Milford Sound Road just out of Te Anau is not utilized enough to give traveler's information. It could be manned periodically on anticipated busier days to provide road safety information."

"More police presence on Milford Road inside the National Park."

"More Public Transport options."

## IDEAS FOR BETTER ADDRESSING NEGATIVE IMPACTS OF TOURISM (CONT.)

[Of those who have been negatively impacted by tourism activity in their local area and strongly disagree or disagree that enough action is being taken to address these] What more do you think could be done?

### LITTER & WASTE MANAGEMENT

"This country is not incentivizing Industry for not only waste reduction but waste conversion into natural gas. We have a large appetite for energy consumption and not enough of it. If you combined household waste organic waste and industrial waste, you could potentially create enough energy for 70% of New Zealand gas requirement."

"Invest and update the local rubbish / recycling system."

"Some of the rubbish bins in the village look disgusting and need replacement."

"Impose fines for those who litter or spoil our environment."

The bins in town are embarrassing!!! Falling over and inadequate for the job at hand. However they need to be replaced in keeping with the environment."

Freedom camping officer and more control around what counts as a "self contained vehicle"

"Reduce numbers into our National Forest and surrounds. Provide upgraded toilet facilities."

"Recycling bins in town, not just rubbish bins - those sets of three for glass, cans and waste."

### NATURAL ENVIRONMENT

"Better management of roadside lay-bys to manage Freedom Campers."

"... capping numbers and putting in sufficient infrastructure to deal with water and waste."

"Strict rules on protected areas. Low-impact visitors only."

"More support for pest eradication in native forests."

"Fund DOC more fully to preserve natural areas."

"Prevent tourist activities from building additional commercial businesses on conservation land (i.e. cycle trail, etc.)"

"Listen to the environmental scientists whose life's work is studying native environments and offering scientific opinions regarding the impact of additional tourist-oriented plans on conservation land or through fragile environments."

"Policing Freedom Camping. Better recycling. Capping numbers into Milford Sound. International visitors to pay National Park entry fees. Limit cruise ships."

"More keep New Zealand clean campaigns which shame people who don't."

## IDEAS FOR BETTER ADDRESSING NEGATIVE IMPACTS OF TOURISM (CONT.)

[Of those who have been negatively impacted by tourism activity in their local area and strongly disagree or disagree that enough action is being taken to address these] What more do you think could be done?

### HOUSING AFFORDABILITY

"Better regulation of short-term accommodation."

"Government housing is needed here."

"More state houses at income-related rents to drive down the housing price bubble."

"Just making house buyers live in their houses would help."

Air BnB's /short term rentals need some central government regulation! At the moment, they have nothing, and no council has the ability to even regulate the few rules they do have. These short term rentals are more often seen as investments, and the hosts don't even live in our communities. They do not participate in the tourism 'ecosystem' just take from it."

"We need more staff accommodation for travellers which then will free up houses for families."

"Less Air BnB type properties to ensure long term rentals are available. Also ensure that Air BnB's etc adhere to the same compliance regs as hotels or motels. re fire safety etc."

Maybe some incentive for locals; have reduced rates if renting to long term rather than tourists."

### COMMUNITY INFRASTRUCTURE

"Limit the number of visitors to the area."

The region needs to understand the increasing requirements of water and energy as the Tourism Industry is geared to increase. We want more people here, but it has to be sustainable and appropriately managed."

"More infrastructure, especially in regard to water supply. Every summer we suffer from water restrictions with NZ second largest lake as a neighbour."

There should be less hotels built in areas that are all ready struggling with infrastructure bringing more and more people into the area leaving Rate payers to fit the cost.

"Tourists should be taxed a lot more on entering our country to compensate for the use of our roads, police & hospital services."

"Encourage rainwater tanks and sustainable stormwater disposal."

"If you live outside the main township of Te Anau internet speeds are diabolical - why the fiber could not have been extended to those living along the Milford Road, just outside town is a mystery."

## IDEAS FOR BETTER ADDRESSING NEGATIVE IMPACTS OF TOURISM (CONT.)

[Of those who have been negatively impacted by tourism activity in their local area and strongly disagree or disagree that enough action is being taken to address these] What more do you think could be done?

### COMMUNITY INFRASTRUCTURE (CONT.)

#### Toilets

"Provide more public toilets along the Milford Road. Improve quality of toilets so people are more likely to use them (no one wants to use a stinky long drop; going in the bush is preferable)."

"More readily accessible toilet facilities."

"Councils need to cater more for visitors. E.g appropriate parking, toilet and waste facilities."

"Better amenities needed. Toilets, lighting, footpaths, more food outlets."

#### Roading (Safety Improvements / Maintenance / Policing)

"Better roads in the major tourist areas. E.g. Some passing lanes on the Milford Road."

"The Milford Road, need I say more?"

"In Te Anau, the Milford Road has become a hugely costly resource - it costs our community many man hours to provide emergency service call outs and takes a lot of valuable police time. A decision that would restrict traffic especially international tourist traffic should be made and actioned."

"Targeted funding and facilities for tourist infrastructure under pressure i.e. key tourist hotspots like Milford Road needs serviced toilets near Homer Tunnel. Resilience and general safety improvements for tourist highways under pressure. Tourism reputation to be maintained."

#### Long Term Planning

"There is not enough forward thinking, we will find ourselves in Queenstown's shoes if nothing is done to future proof."

"Consider long term planning and building our roads like the States where it's almost like a runway for aeroplanes rather than tar seal needing to be replaced every so many months and costing more."

#### Wastewater and Sewage

"Milford sometimes stinks of Sewage and Te Anau has had to send their Sewage to another place near a neighbouring town Manapouri - how abhorrent is that. Surely there must be a way to contain the sewage in both places."

"Better roading. Improved treatment of storm water and wastewater before discharge."

#### Water Shortages

Properties in the township should have water metered so that people pay for their consumption. I often see motels/ Air bnb's and private homes with unattended sprinklers etc all summer. Visitors need to know that our water is not infinite - especially during the summer.

#### Public Transport

"Park and ride to Milford Sound."

"Get them onto busses and make the busses greener."

## IDEAS FOR BETTER ADDRESSING NEGATIVE IMPACTS OF TOURISM (CONT.)

[Of those who have been negatively impacted by tourism activity in their local area and strongly disagree or disagree that enough action is being taken to address these] What more do you think could be done?

### CAR PARKING & TRAFFIC MANAGEMENT

"Removing campervans from the town CBD in Te Anau, or removing vehicle access to some parts altogether will encourage people to park and walk."

"More signage is needed to encourage locals who work at the shops to park in the Event Centre Car Park. One hour parking needs to be incorporated in front of the supermarket."

"Don't want to see more parks but encourage more walking or other options (public transportation)."

"The MOP Planning work is a classic example. The solution has been found, costed and justified ... get on with it."

"A more reliable and consistent Bus Service which can pick up and drop at multiple destinations."

"Get tourists onto busses. Introduce park and ride services with feeder trolley busses."

"More planning around where some traffic can go in CBD so it doesn't become too congested e.g. better campervan parking, supermarket in Te Anau needs better layout of exiting and entering rather than going in and out of same place right by pedestrian crossing! accident waiting to happen there."

### COST OF LIVING

"Through our rates we subsidise those that use their own or their rental properties for AirBnB. All properties being used for AirBnB or similar should have to pay higher rates - perhaps somewhere between full commercial and normal residential rates."

"We need more shops to service the local community. Currently shops are too focused on the tourism market; to buy basic things such as clothes and household goods."

"Local discounts at restaurants and supermarkets; items are way too expensive."

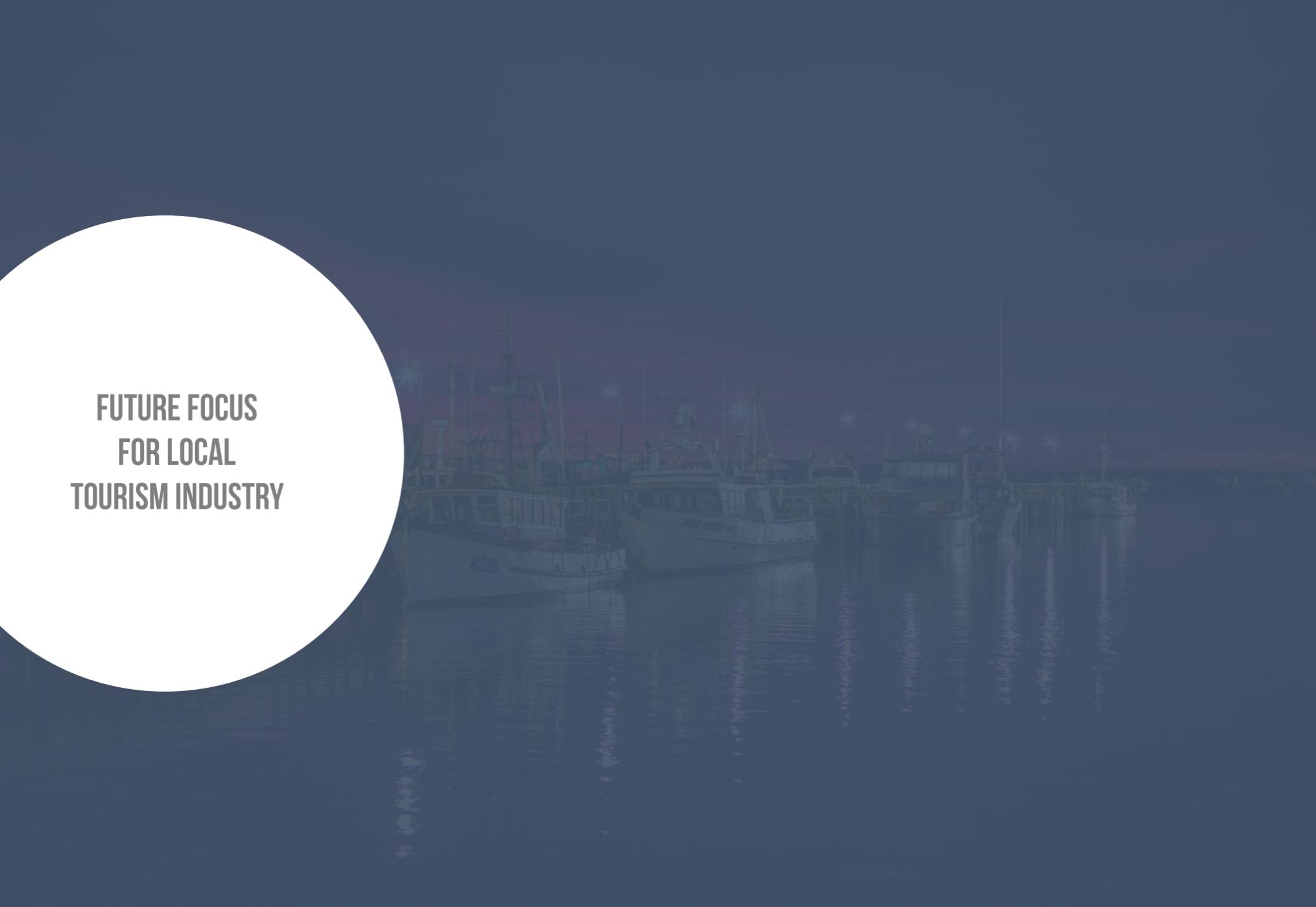
"More competition, particularly in the grocery and fuel sector."

"Subsidies would go some way to offset the costs that are inflated by overseas tourist movements."

"More worker accommodation for those having to rent. Create a better system around encouraging those with rental properties to do long term rentals rather than Air BnB."

"Tax the millionaires. Capital gains tax."

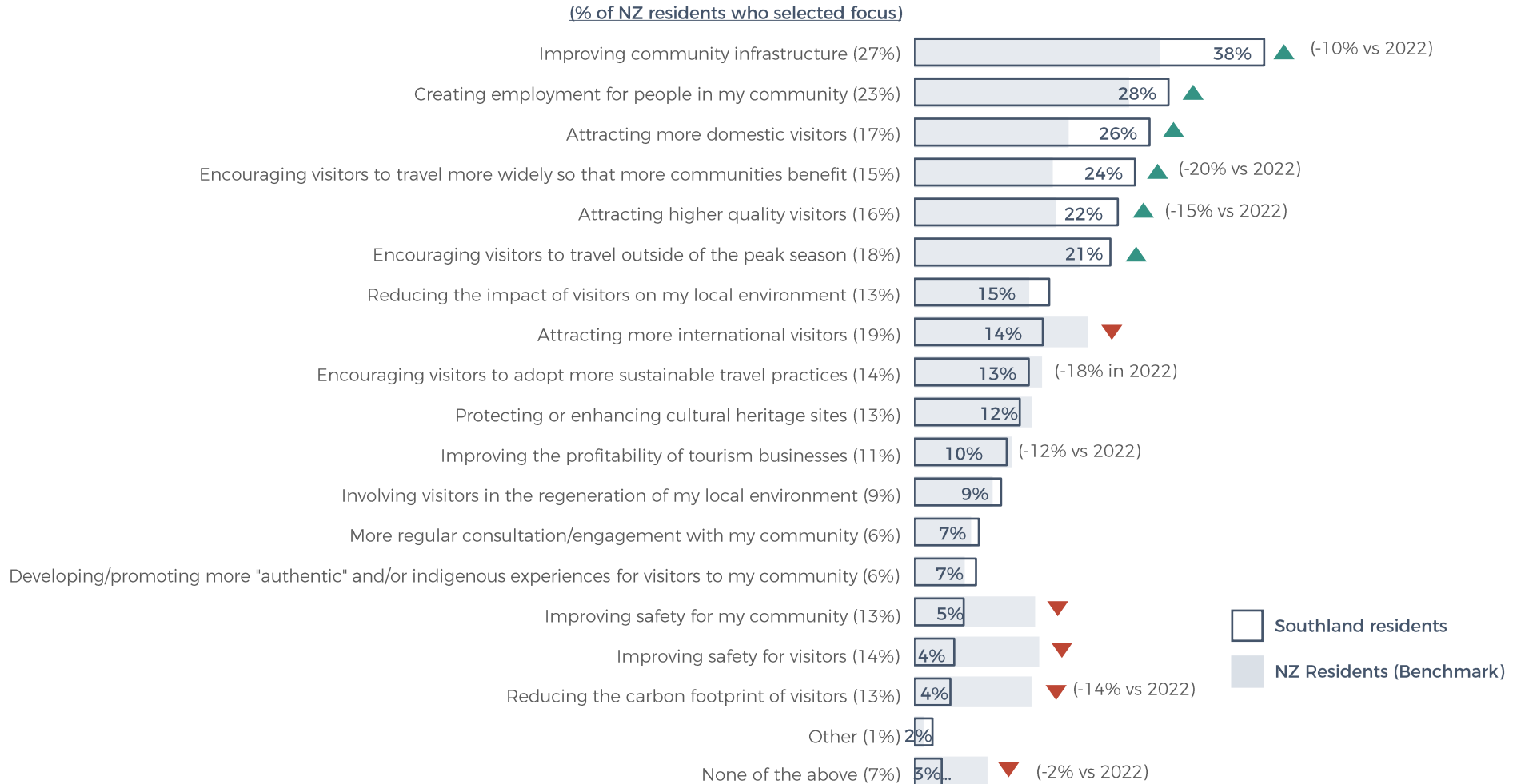
"Tourism for the most part generates low value jobs which are not being filled by NZ'ers. In the same way it increases costs as we have to pay what international visitors are willing to pay."



**FUTURE FOCUS  
FOR LOCAL  
TOURISM INDUSTRY**

## FUTURE FOCUS FOR TOURISM INDUSTRY (VS. NZ BENCHMARK)

On which of the following would you most like to see your local tourism industry focus in the future (select up to three options)?



## VIEWS ON TOURISM: GREAT SOUTH

# FUTURE FOCUS FOR TOURISM INDUSTRY

	Fiordland	Rest of Southland	Murihiku Southland (Total)	NZ (Benchmark)
Improving community infrastructure	30%	39%	38%	27%
Creating employment for people in my community	13%	28%	28%	23%
Attracting more domestic visitors	17%	26%	26%	17%
Encouraging visitors to travel more widely so that more communities benefit	16%	25%	24%	15%
Attracting higher quality visitors	31%	22%	22%	16%
Encouraging visitors to travel outside of the peak season	44%	20%	21%	18%
Reducing the impact of visitors on my local environment	25%	14%	15%	13%
Attracting more international visitors	6%	14%	14%	19%
Encouraging visitors to adopt more sustainable travel practices	33%	12%	13%	14%
Protecting or enhancing cultural heritage sites	3%	12%	12%	13%
Improving the profitability of tourism businesses	3%	10%	10%	11%
Involving visitors in the regeneration of my local environment	16%	9%	9%	9%
More regular consultation/engagement with my community	6%	7%	7%	6%
Developing/promoting more "authentic" and/or indigenous experiences for visitors to my community	5%	7%	7%	6%
Improving safety for my community	11%	5%	5%	13%
Improving safety for visitors	4%	4%	4%	14%
Reducing the carbon footprint of visitors	9%	4%	4%	13%
Other	0%	2%	2%	1%
None of these	1%	3%	3%	7%
Base: n=	166	224	390	3027

## TOURISM IN THE COMMUNITY (FURTHER COMMENTS)

What other comments do you have about tourism in your community?

### Employment opportunities

"Can be improved by permanent seasonal roles giving security and education of people on their employment rights."

"More marketing for winter tourism in Te Anau and Milford to spread visitor numbers across the year. More cultural opportunities such as festivals, concerts etc."

"Enforce living wage as a minimum and offer training to upskill staff in winter."

"Minimum wage could be flexibly increased in tourism sector. Resulting overall cost increase in tourism services might balance out as current tourism demand increases. Needs to be flexible if demand decreases."

### Access to local attractions, landmarks and/or events for locals

"We steer clear of tourist traps etc and travel in winter which means less tourists generally."

"Priority needs to be given to Kiwis."

"Having a local day / weekend."

"Having a daily cap / limit so everyone can actually enjoy a space rather than be crammed in like sardines."

"Could have a proportion allocated to locals."

"Provide locals with cheaper rates to walk the great walks. Create a booking system where they take on more locals."

### Noise Pollution

"Are there any limits on how much activity helicopters can undertake? It seems to keep increasing."

"Is there a way to make jet and outboard boats quieter?"

### Pricing for locals

"Discounts for locals in areas such as Te Anau, Queenstown & Milford Sound. E.g. Real NZ are the only option to see Doubtful Sound, but the price is too high for most locals and domestic travellers."

"Reduce costs to locals e.g., for school holidays."

"Companies could provide more local discounts for families."

"Have ratepayer concessions."

### Housing

"Tourism activity means that the availability of housing has decreased."

"Limit short-term rentals and increase long-term rentals."

## TOURISM IN THE COMMUNITY (FURTHER COMMENTS) (CONT.)

What other comments do you have about tourism in your community?

### **Native species and wildlife (including marine life, birds etc.)**

"I think more educational tools need to be offered to our international visitors (in particular) that may not understand the significance of our local flora and fauna. The tools should be in multiple languages and possibly offered as an interactive AI supported mobile app., that can help to increase the visitor experience as well."

"Support DOC. Change how they community think about DOC, so they appreciate that tourism is based on the birds etc and what DOC does. Then they might listen and realise that feeding Kea is not good."

### **Climate change impacts**

"Tricky - as we can't have visitors and reduce the carbon footprint but, increased support and funding for cycleways and joining them up . The Around the Mountains Cycleway should always have come through/to Te Anau rather than being Queenstown focused. Some more community transport options would be valued – e.g. buses linking us with a regular service to Invercargill, Queenstown, Gore, Dunedin. People without cars are stranded here. An organised carpooling system would be good too."

"An immediate impact could be having a park and ride point in Te Anau mandatory for all visitors to visit Milford Sound. The transportation used for this could electric and any tourism operators must also have electric or hybrid buses."

### **Changes in the character of community**

"Restrict AirBnB to central area if require a host. At present we see modern homes on subdivisions used exclusively for AirBnB, so no families can rent and build community."

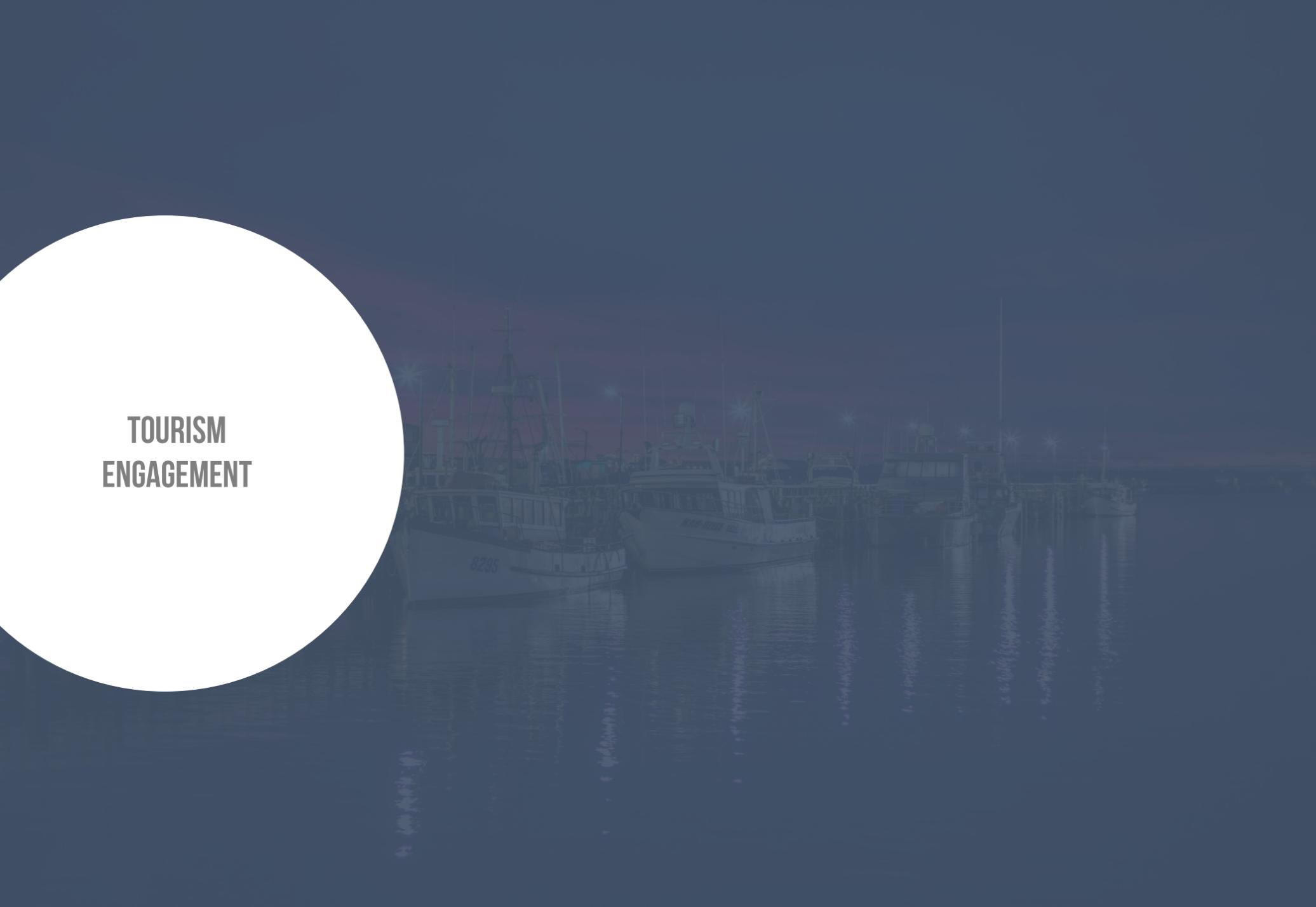
"Social license needs to be taken seriously again - it's not just a numbers game."

### **Reliance on tourism**

"Need to diversify income streams in Te Anau to high earning /return industries that are also good for the environment. E.g., technology."

"Jobs for nature initiatives like tree planting and Undaria weeding etc. Terrestrial weeding for cotoneaster etc in off season available to more people."

"I think some action is being taken here in Te Anau - with new jobs in community well-being. Perhaps the Regional Tourism Organisation need to better promote the region to domestic visitors to encourage them to visit beyond the peak season. Also investment in year-round facilities e.g. an indoor heated pool would help. It would also help if Te Anau had its long-awaited museum/ exhibition space - if this were well designed and interactive - it could be a year-round attraction .... a must-do for visitors to Fiordland."

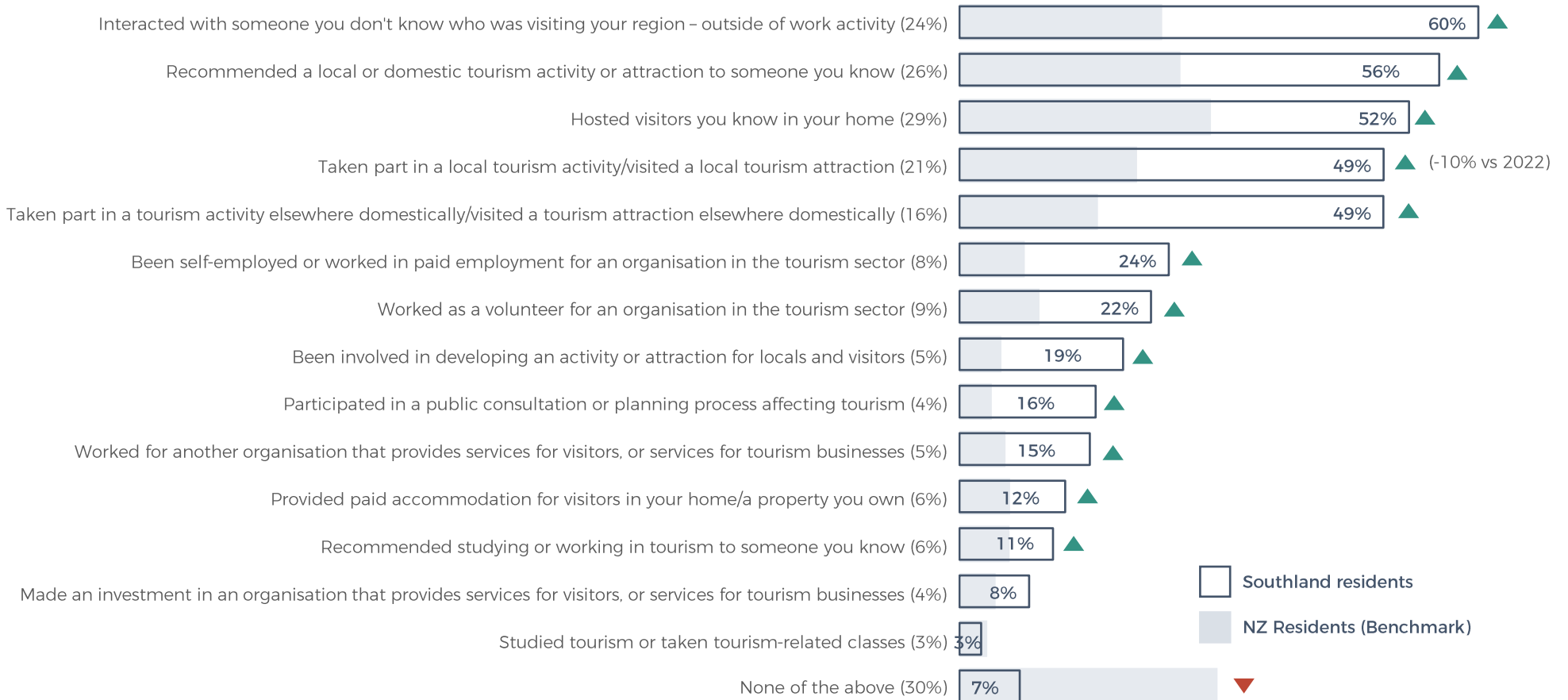


**TOURISM  
ENGAGEMENT**

## RESIDENT ENGAGEMENT WITH TOURISM (VS. NZ BENCHMARK)

Which of the following have you personally done in the last two years (if any)?

(% of NZ residents who selected action)

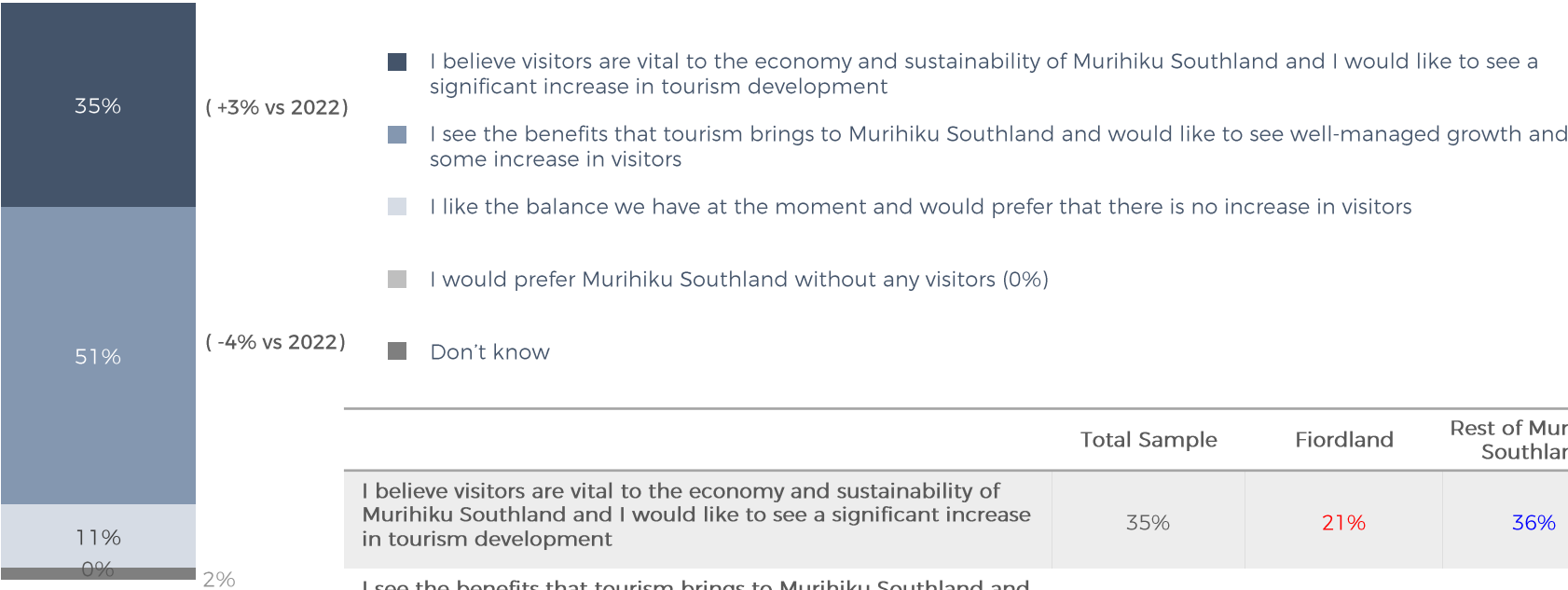


CUSTOM QUESTION



# TOURISM DEVELOPMENT IN MURIHIKI SOUTHLAND

Which one of the following best describes your views on tourism development in Murihiku Southland?



	Total Sample	Fiordland	Rest of Murihiku Southland
I believe visitors are vital to the economy and sustainability of Murihiku Southland and I would like to see a significant increase in tourism development	35%	21%	36%
I see the benefits that tourism brings to Murihiku Southland and would like to see well-managed growth and some increase in visitors	51%	57%	51%
I like the balance we have at the moment and would prefer that there is no increase in visitors	11%	19%	11%
I would prefer Murihiku Southland without any visitors	0%	3%	0%
Don't know	2%	0%	2%
Base: n=	390	166	224

## SAMPLE PROFILE



## VIEWS ON TOURISM: GREAT SOUTH

# SAMPLE PROFILE

Gender	
Male	30%
Female	67%
Gender Diverse / Prefer not to say	3%
Age	
15 – 19 years	2%
20 – 29 years	8%
30 – 39 years	17%
40 – 49 years	22%
50 – 59 years	22%
60 – 69 years	17%
70+ years	12%
Travel in Past 12 Months	
Travelled in New Zealand	87%
Travelled outside New Zealand	41%
Have not travelled	6%
Base: Total Sample (unweighted)	n=390

Household Composition	
My husband, wife or partner	71%
My mother and/or father	3%
My children aged under 5	11%
My children aged 5 to 14	23%
My children aged 15 or older	15%
Other family/relatives	5%
Other person(s)	6%
None of the above – I live alone	12%
Would rather not say	3%
Occupation*	
Employed full-time in paid work (30+ hours per week)	47%
Employed part-time in paid work (<30 hours per week)	16%
Unpaid/volunteer work (full-time or part-time)	9%
Self-employed	25%
Studying	5%
Looking after family and/or home	6%
Looking for work or unemployed	1%
Retired	15%
Beneficiary	1%
Other	1%
Base: Total Sample (unweighted)	n=390

Sector*	
Administrative and support services	14%
Agriculture, forestry and fishing	12%
Arts and recreation services	3%
Construction	4%
Education and training	15%
Electricity, gas, water and waste services	1%
Financial and insurance services	3%
Health care and social assistance	8%
Information media and telecommunications	4%
Manufacturing	3%
Mining	0%
Professional, scientific and technical services	9%
Public administration and safety	4%
Rental, hiring and real estate services	2%
Retail trade	9%
Tourism (including accommodation and hospitality)	24%
Transport, postal and warehousing	5%
Wholesale trade	2%
Other	10%
Base: Employed (unweighted)	n=315

\*Multiple response, totals add to more than 100% 40

## VIEWS ON TOURISM: GREAT SOUTH

### SAMPLE PROFILE (CONT.)

#### Connection to Murihiku Southland

Whakapapa	6%
I live in Murihiku Southland	97%
I have a crib or other property in Murihiku Southland and spend more than half of the year there	4%
I have a crib or other property in Murihiku Southland and spend less than half of the year there	1%
None of the above	0%

#### Place of residence

Fiordland	43%
Heartland Murihiku Southland	11%
Invercargill / Bluff	37%
Stewart Island Rakiura	2%
Waihōpai Toetoe Community Board area	3%
Western Murihiku Southland	5%
Base: Total Sample (unweighted)	n=390

#### Whakapapa

Fiordland	27%
Heartland Murihiku Southland	27%
Western Murihiku Southland	36%
Invercargill / Bluff	50%
Stewart Island Rakiura	14%
Waihōpai Toetoe Community Board area	27%
Base: Whakapapa in Southland (unweighted)	n=22

#### Ethnicity

New Zealand European	81%
New Zealand Māori	10%
Cook Island Māori	0%
Samoan	0%
Tongan	0%
Niuean	0%
Chinese	1%
Indian	1%
Other (please specify)	11%
Prefer not to say	4%
Base: Total sample (unweighted)	n=390

