



International visitor insights to inform the options analysis for the International Visitor Access Charging (IVAC) implementation programme

April 2026



Department of
Conservation
Te Papa Atawhai

Research objective

To deliver robust insights to support assessment of the feasibility and risks of introducing international visitor access charges and ensure they are appropriately set and integrated with the current visitor management strategies

Background

- The Department of Conservation (DOC) faces significant fiscal constraints while visitor numbers continue to rise, putting pressure on key sites
- To remedy, DOC is investigating the feasibility of charging international visitors for access to selected, highly popular, public conservation areas. Four priority sites have been identified:
 - Piopiotahi Milford Sound
 - Aoraki / Mount Cook
 - Mautohe Cathedral Cove
 - Tongariro Alpine Crossing
- To ensure access fees are appropriately determined and implemented, DOC has engaged Kantar to conduct primary research with international visitors to New Zealand to address three key insights areas:
 1. Understand international visitor characteristics to inform feasibility, system design, and communication strategies
 2. Identify optimal fee levels for international visitors to mitigate visitation risks and maximise revenue opportunities
 3. Determine what international visitors expect fees to fund and how this influences their experience



To meet DOC's objectives, we applied a multi-method approach

Objective 1: International Visitor Profiles

- A 7-minute intercept survey was conducted with **international** visitors to Mautohe Cathedral Cove and Aoraki / Mount Cook National Park
- Approximately 100 respondents were interviewed at each location
- At Cathedral Cove, visitors were intercepted at the intersection where tracks from Grange Road Carpark and Lees Road Carpark merge, capturing visitors starting their walk from both entry points
- At Aoraki / Mount Cook, intercepts were conducted at the White Horse Hill Carpark
- Fieldwork took place between 7th – 9th March
- The survey was available in English, Chinese, and Japanese

Objective 2 & 3: Willingness to Pay & Expectations

- Questions were added to the Tourism New Zealand Active Considerer Monitor (ACM)
- Markets included: Australia, USA, UK, Germany, China
- N=300 Active Considerers (ACs) in each market
- To be defined as an Active Considerer the respondent needs to have strong consideration for New Zealand and indicate that it is their preferred destinations to visit next and meet a minimum intended spend criterion
- Price elasticity was tested for 3 walks/experiences: Cathedral Cove, Aoraki / Mount Cook, and Tongariro Alpine Crossing



Our approach to identifying optimal access fee levels for international visitors

- We tested price elasticity for three walks/experiences: Cathedral Cove, Aoraki / Mount Cook, and the Tongariro Alpine Crossing
- Respondents were shown a short concept description with images for each site to help them assess their willingness to pay
- Since most future visitors are not yet in planning mode for their New Zealand holiday, this provided an understanding of the experience they can expect and allows them to assess their willingness to pay
- An additional concept was created to test a multi-site pass for four locations: Cathedral Cove, Aoraki / Mount Cook, and the Tongariro Alpine Crossing and Milford Sound.
- Each respondent evaluated two walk/experience concepts (out of three Cathedral Cove, Aoraki / Mount Cook, and the Tongariro Alpine Crossing concepts), and all respondents assessed pricing for the multi-site pass
- When testing price points for the Tongariro Alpine Crossing, we specifically stated that most visitors will also need take a return shuttle bus to get to and from the hike, which costs an additional \$70 NZD (approximately)
- Full concepts are presented on the next slide



Experience concepts used in the research



Cathedral Cove is located on the Coromandel Peninsula and is one of New Zealand's most iconic coastal attractions. Known for its dramatic natural rock arch, white sandy beach, and clear blue water, it offers a unique blend of scenic beauty and a relaxed seaside atmosphere.

Visitors usually reach the Cove via a scenic walking track and can spend time swimming, relaxing, or taking in the coastal views.

It's a place people often visit for its striking landscape and peaceful seaside atmosphere. The main walk to the Cathedral Cove is 45-minute walk each way, with several lookouts and side tracks to explore.



Aoraki / Mount Cook National Park is known for its dramatic alpine scenery, including New Zealand's highest peak, its longest glacier, and clear mountain lakes.

Visitors can explore a number of tracks ranging from short trails to steep alpine hikes. Popular walks include the iconic Hooker Valley Track with its spectacular mountain views, snowy peaks, and swing bridges (around 3 hours return), or the Blue Lakes and Tasman Glacier View walk (20 - 40 minutes).

The park offers a mix of accessible nature experiences and more challenging terrain and overnight experiences, making it a popular destination for sightseeing, photography, and outdoor recreation.



The Tongariro Alpine Crossing is a well-known full day hike through an active volcanic landscape, featuring craters, rugged terrain, and the distinctive Emerald Lakes.

This challenging track typically takes 6 - 8 hours to complete and offers wide ranging views across the central North Island.

Visitors experience a mix of steady climbs, open alpine sections, and scenic descents, making it a popular choice for fit and well-prepared hikers wanting to explore a dramatic and memorable volcanic environment.



The multi-site pass provides entry for international visitors to **four** iconic New Zealand experiences:

- **Piopiotahi Milford Sound** (stunning UNESCO World Heritage Site, home to Mitre Peak wildlife and cascading waterfalls)
- **Cathedral Cove** (picturesque coastline and archway, with pristine water and white sand beach)
- **Aoraki / Mount Cook National Park** (beautiful region, with New Zealand's highest mountains and longest glacier), and
- **The Tongariro Alpine Crossing** (challenging volcanic day hike with spectacular landscapes and scenery)

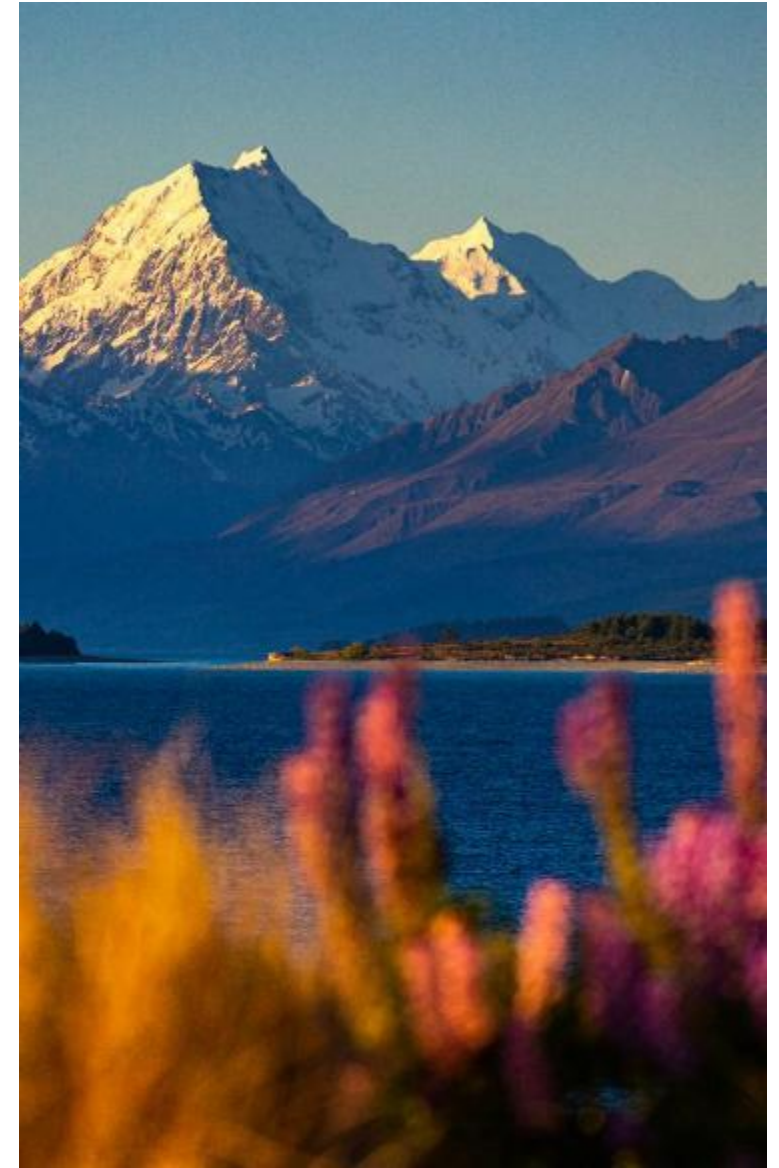
The pass covers access only to these locations, does not include transport, parking, equipment, guiding, or accommodation.

Executive summary



Executive summary

- **International visitors broadly accept paying access fees** for national parks and scenic landmarks, therefore, introducing access charges is both socially and commercially viable
- Across all three locations, **access fees are unlikely to substantially dampen strong interest in visiting** them - thus, access fees can be introduced with confidence, but with greater caution applied at Cathedral Cove due to higher price sensitivity at this location
- **Access fees are unlikely to deter travel to New Zealand overall**, with primary impact expected to be substitution with another free nature experience rather than trip cancellation, although some shortening of stay may occur especially with Chinese visitors
- **Clear communication that fees are reinvested in conservation, particularly at the location visited, increases willingness to pay** - revenue use should be highly visible and locally framed
- **Paid access sets clear expectations that fees will fund essential infrastructure and safety**, hence, investment should prioritise basics such as toilets, drinking water, track maintenance and visitor information
- **Interest in Māori culture and local history is strong**, but delivery is stronger at Aoraki / Mount Cook; therefore, there is a clear opportunity to lift interpretation at Cathedral Cove to strengthen the value proposition under paid access



Recommended approach for access fee implementation

Cathedral Cove	Aoraki / Mount Cook National Park	Tongariro Alpine Crossing	Multi-site pass (incl. Milford Sound)
– To minimise friction and entry barriers, the most suitable approach is a multi-point ticketing system covering the three main access routes: the Hahei shuttle, Lees Road entry, and walking access via Grange Road – Even though most visitors use the shuttle, significant volumes still arrive via Lees Rd and on foot from Hahei via Grange Rd – Tickets must be purchasable before boarding the shuttle to avoid congestion at Grange Rd, especially at peak times – As visits are often spontaneous, success with access charging depends on clear on-the-ground messaging, intuitive access, and minimal administrative friction – The optimal access fee range is within \$40-\$50 per adult person – this is most price-sensitive location, with higher fees leading to quicker drop-off in willingness to pay	– A road / vehicle-based access charging system is best aligned with how international visitors currently access the park – Most visitors arrive by rented car or campervan, and travel in small groups of 2 or 3, and very few travel with New Zealand residents in the same vehicle – Visitor arrivals peak late morning to early afternoon, so charging mechanisms must be able to handle high midday volumes efficiently – Visits are typically planned well in advance, supporting pre-trip payment approach – The optimal access fee range is within \$60-\$80 per adult person – Higher price tolerance reflects iconic status and planned nature of visits; willingness to pay remains strong at this level	– Charging mechanism not directly tested – The optimal access fee range is within \$40-\$60 per adult person – Fee must be communicated alongside shuttle costs to avoid compounding perceived expense – Clear framing of what the fee covers is critical	– There is strong overall consideration for a multi-site access pass, but the offer needs to reflect how visitors travel – Cathedral Cove typically features within itineraries spanning both the North and South Islands, while Aoraki / Mount Cook sits firmly within South Island-centric trips alongside Milford Sound – This suggests potential value in offering North and South Island passes alongside a national option – Strong demand across most markets, with broad uptake sustained up to \$225 per adult person – Clearly communicate that the pass covers access only (not transport or tours).

Objective 1

International visitor profiles

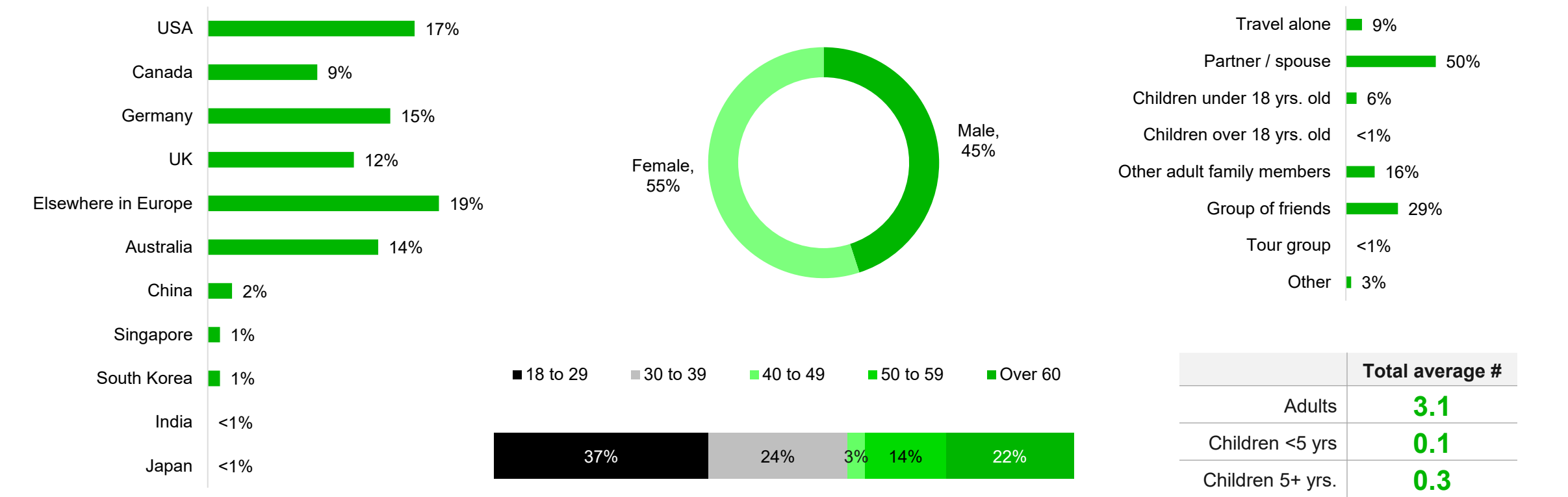
NB: Results in this section are among **international visitors** to Cathedral Cove and Aoraki / Mount Cook National Park



Cathedral Cove attracts younger international visitors and mainly from Europe and North America and typically travelling as couples without children



International visitor demographic profile – Mautohe Cathedral Cove

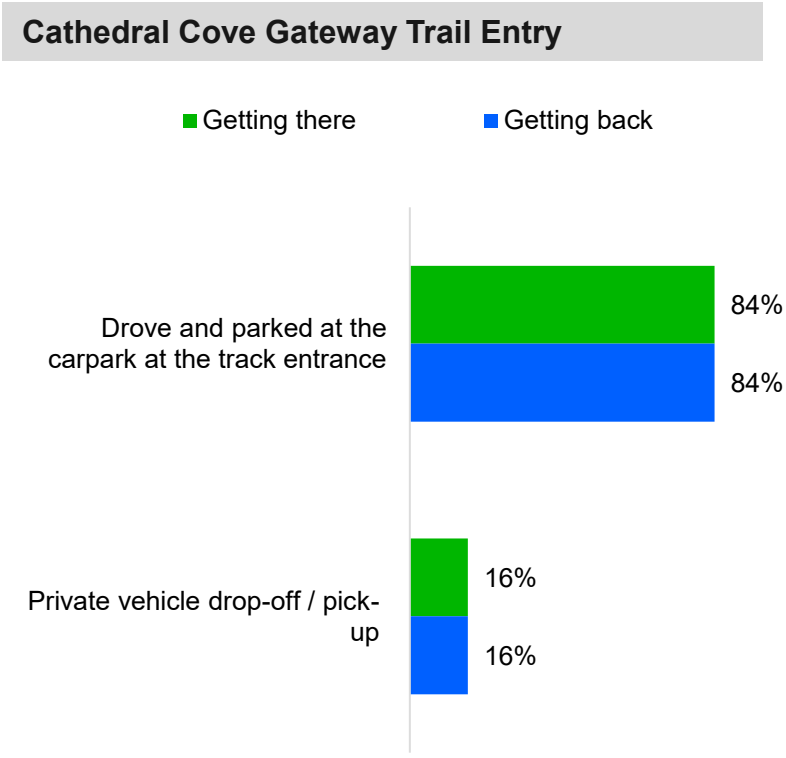
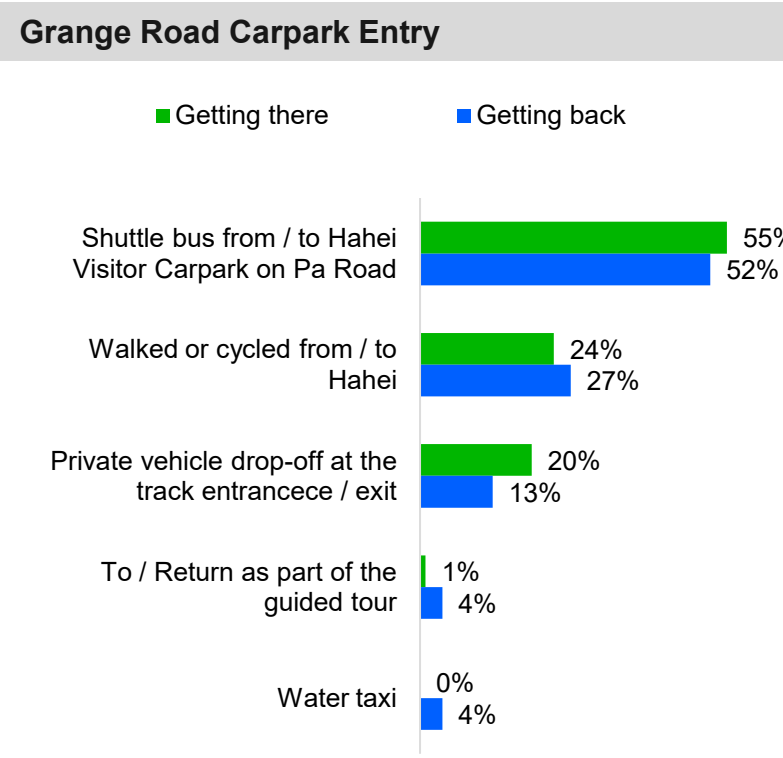
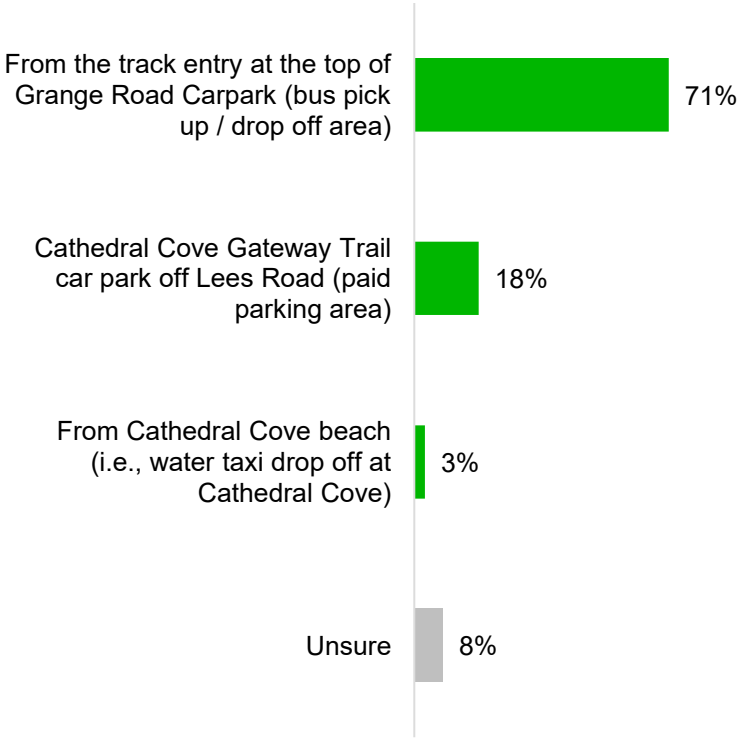


Most international visitors access Cathedral Cove via the Grange Road entry and rely heavily on shuttle, highlighting strong dependence on managed access systems



Access points and transport to / from Mautohe Cathedral Cove (international visitors)

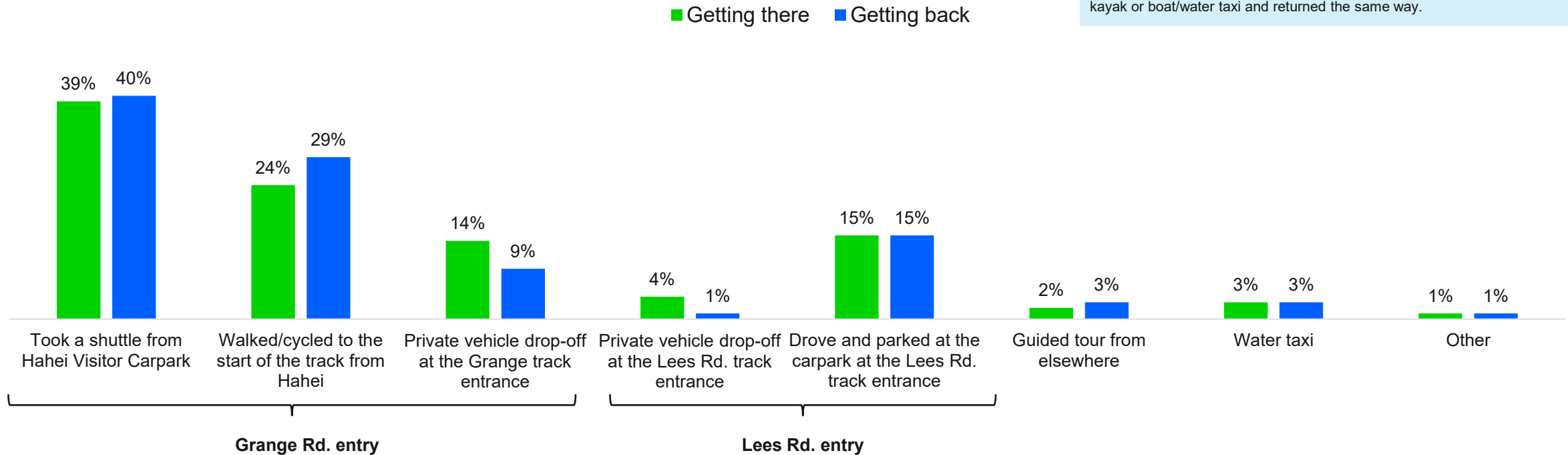
NB: The interviewing location was on the track at the point where the Lees Road track and the Grange Road track merge. Therefore, it is likely that we did not capture a representative sample of those who visited Cathedral Cove beach via kayak or boat/water taxi and returned the same way.



The primary pathways used by international visitors to access Cathedral Cove are shuttle services from Hahei and walking access from Hahei



Access points and transport to / from Mautohe Cathedral Cove (international visitors)

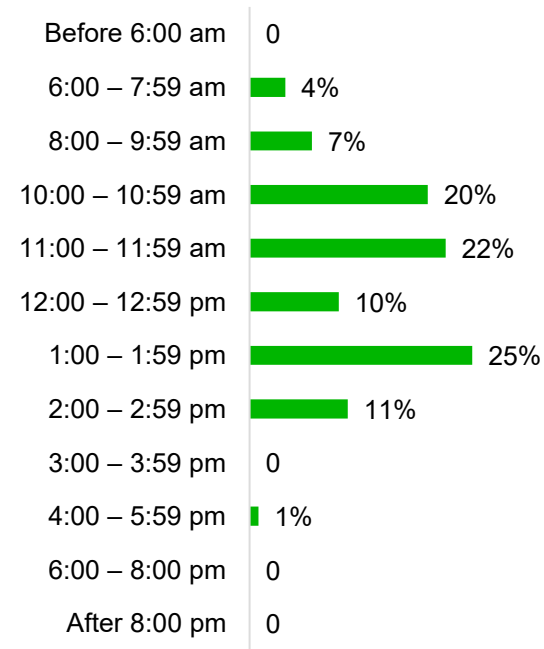


International visitor arrivals cluster from mid-morning to early afternoon, with most spending 2 to 3 hours on site, creating a pronounced midday peak in both arrivals and dwell time

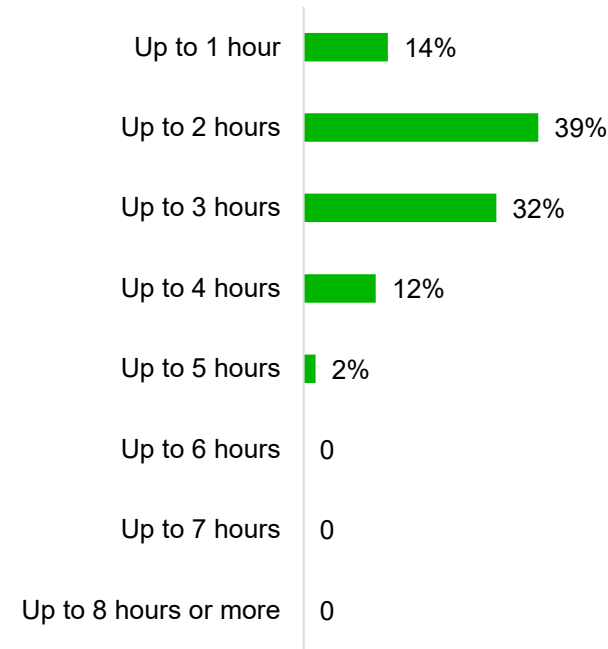


Start time and length of the walk - Mautohe Cathedral Cove (international visitors)

Time started walk



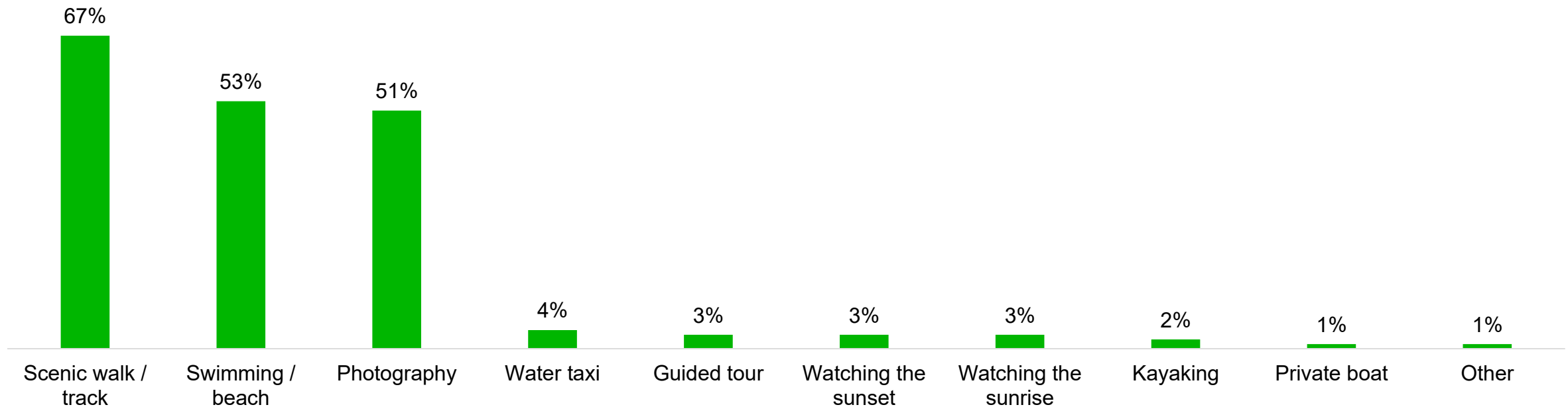
Time spent at the site



Most international visitors combine a scenic walk with time at the beach, while only a small minority stay for sunrise or sunset moments



Activities - Mautohe Cathedral Cove (international visitors)



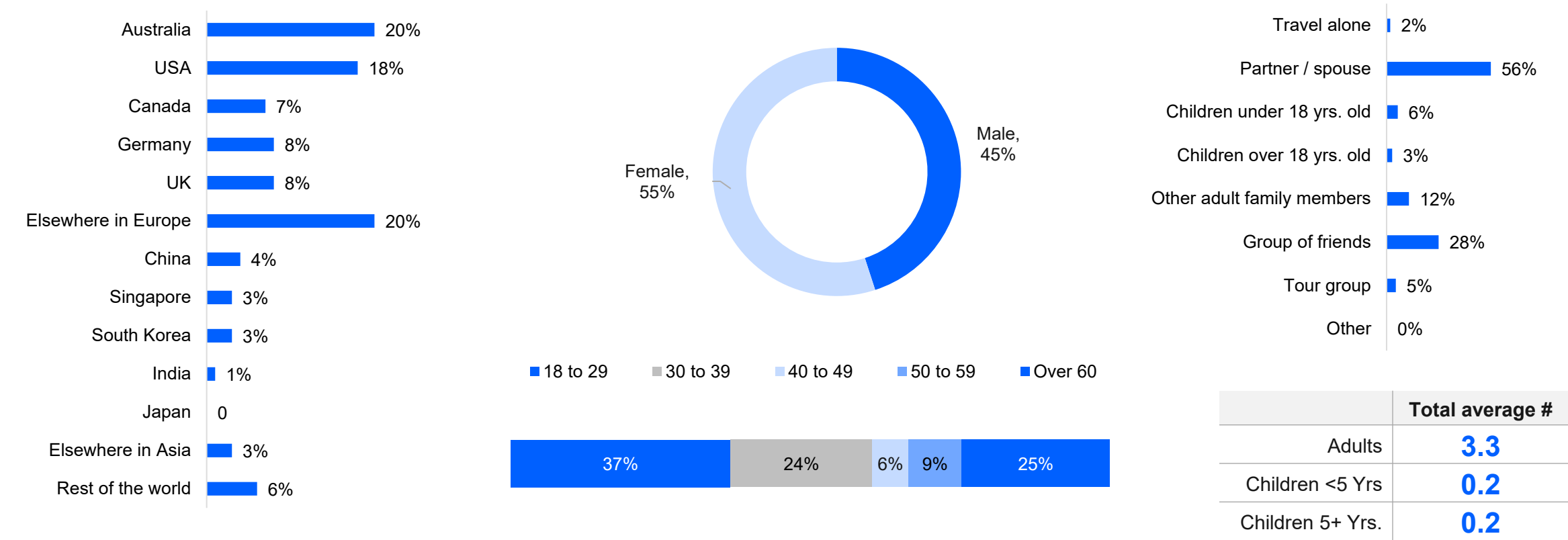
Aoraki / Mount Cook draws a predominantly European, Australian and US visitor mix, skewing younger and travelling mainly as couples without children



Aoraki / Mount Cook

International visitor demographic profile – Aoraki / Mount Cook National Park

NB: Interviews were conducted at the White Horse Hill Carpark; the sample likely did not capture visitors who did not pass through this location; those visiting as part of a group tour or by bus may also be underrepresented. Market mix can vary throughout the year due to seasonal differences in visitation patterns across markets.



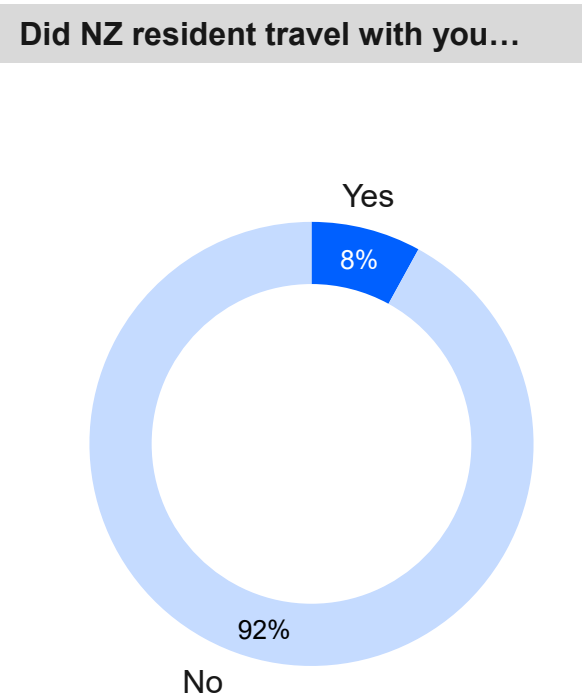
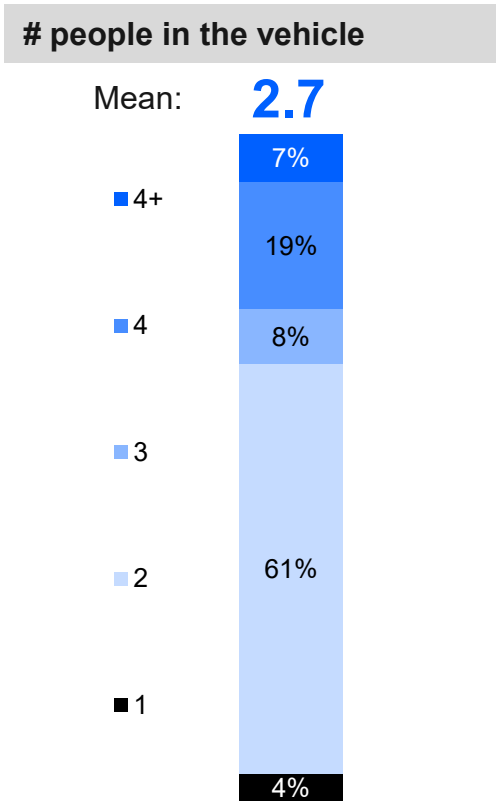
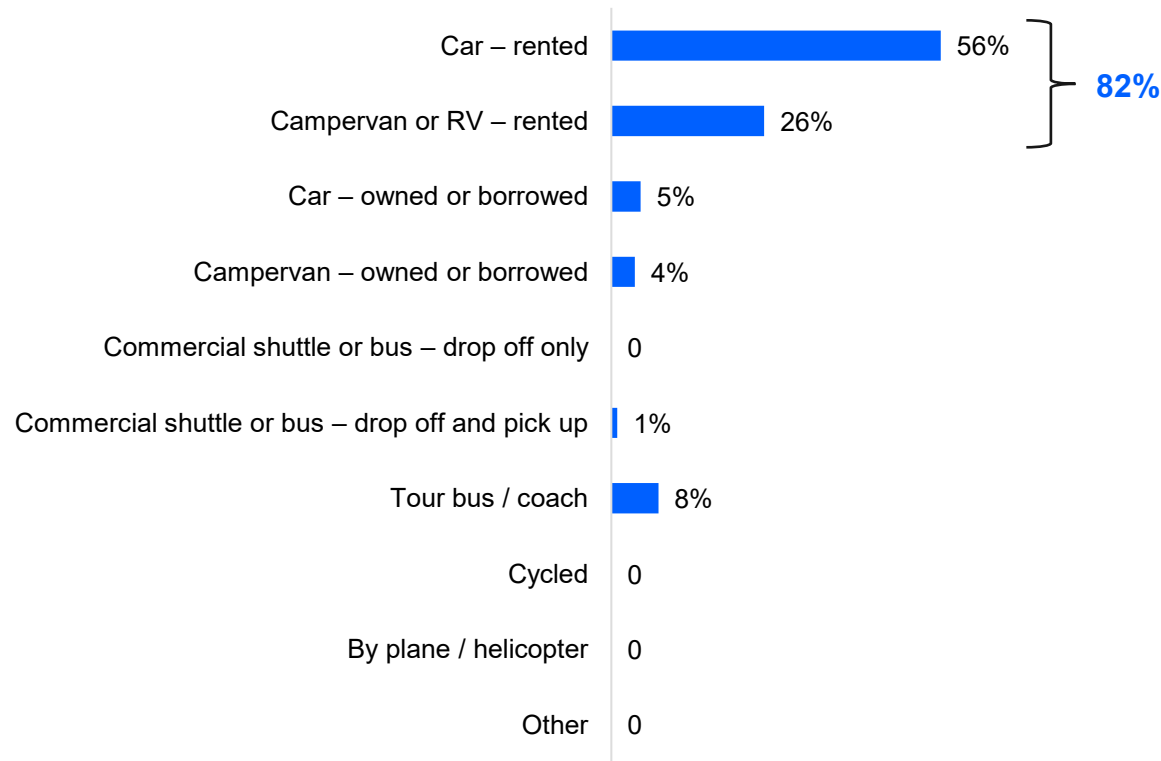
Most international visitors reach Aoraki / Mount Cook by rental vehicle, travelling in small groups of two to three, with very few accompanied by New Zealand residents



Aoraki / Mount Cook

Mode of transport – Aoraki / Mount Cook National Park (international visitors)

NB: Interviews were conducted at the White Horse Hill Carpark; the sample likely did not capture visitors who did not pass through this location; FITs might be overrepresented while those visiting as part of a group tour or by bus may also be underrepresented

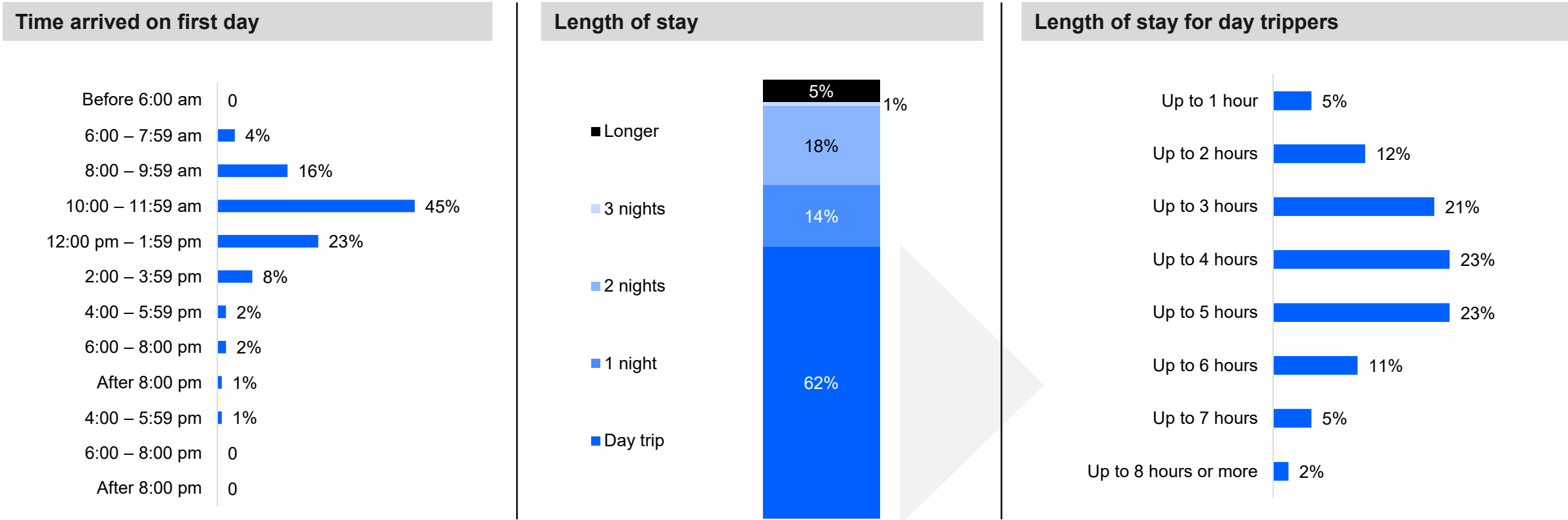


Arrivals peak late morning to early afternoon, with most international visitors staying only a day and spending several hours in the park



Aoraki / Mount Cook

Arrival time on a the first day and length of stay – Aoraki / Mount Cook National Park (international visitors)



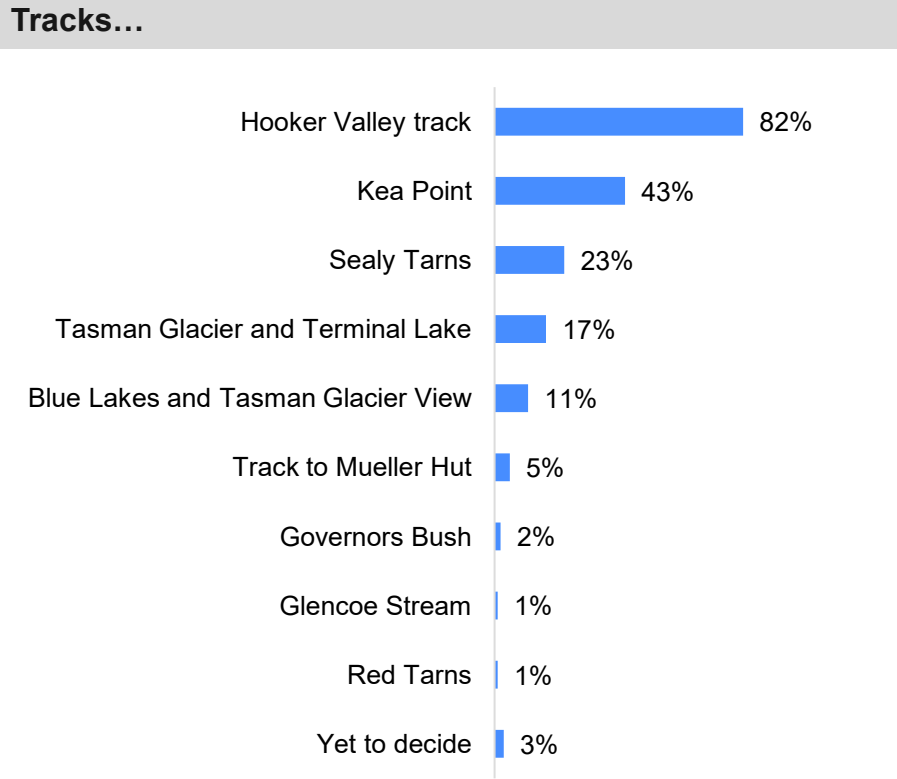
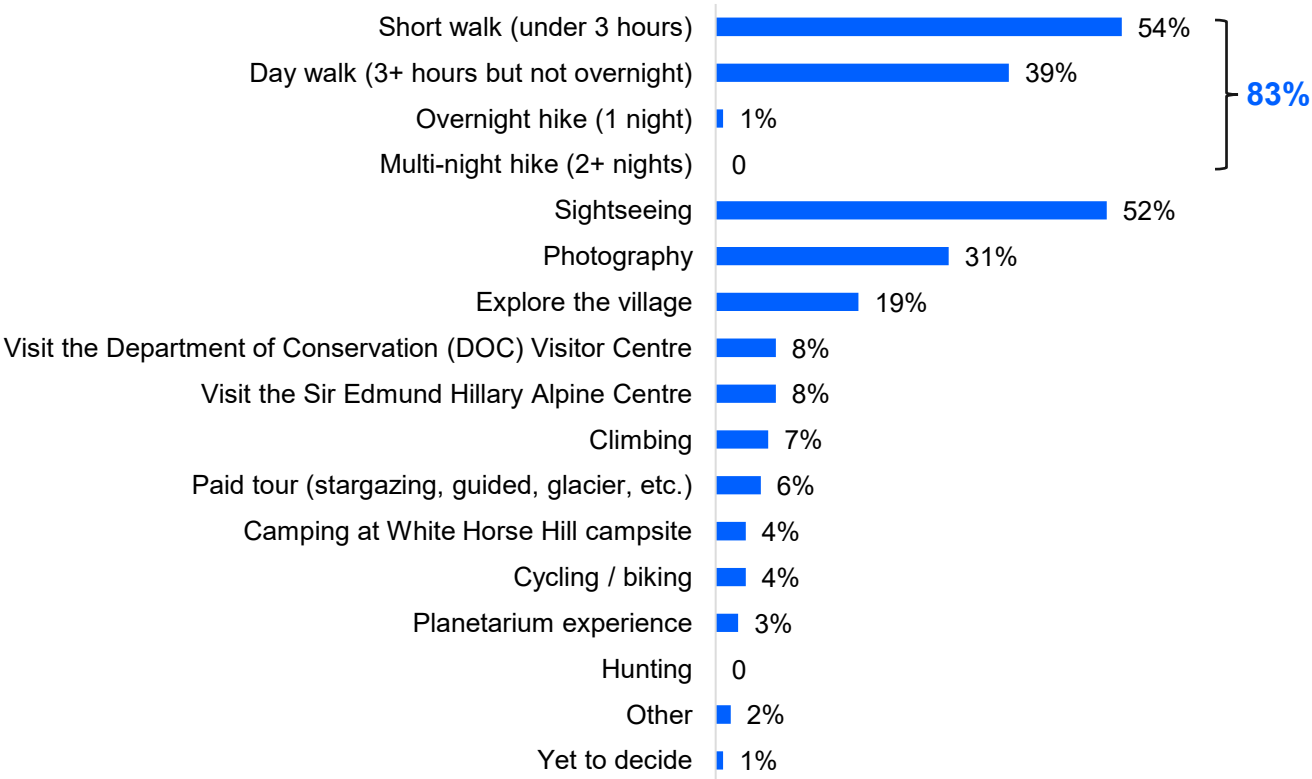
International visitors come to Aoraki / Mount Cook to do short walks, especially the Hooker Valley Track, with minimal uptake of longer or overnight hikes



Aoraki / Mount Cook

Activities and tracks - Aoraki / Mount Cook National Park

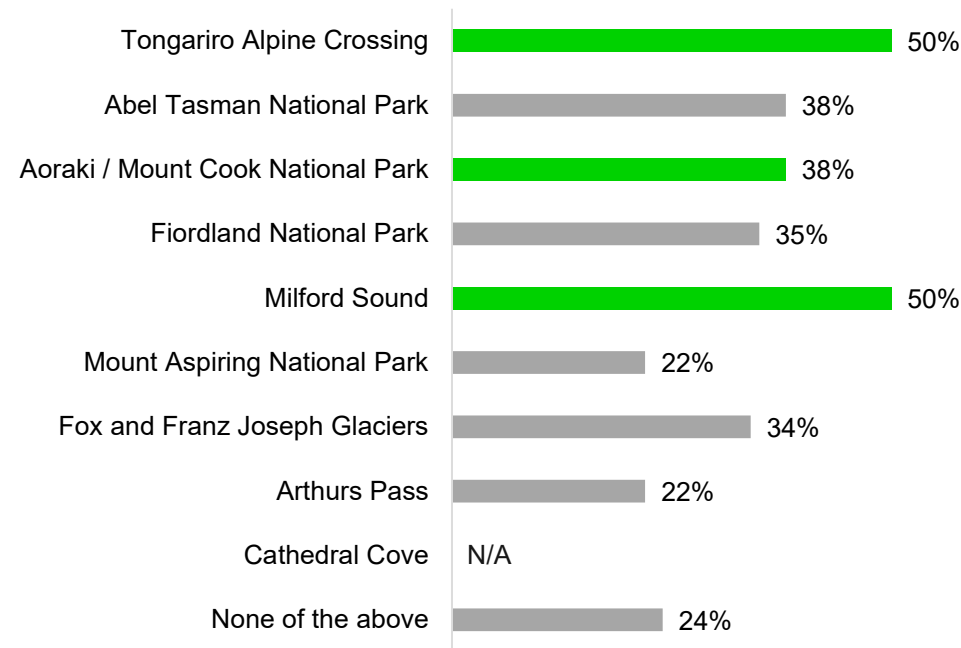
NB: Interviews were conducted at the White Horse Hill Carpark; the sample likely did not capture visitors who did not pass through this location and those visiting as part of a group tour may also be underrepresented; market mix can vary throughout the year due to seasonal differences in visitation patterns across markets.



Cathedral Cove features within broader multi-stop itineraries across both the North and South Islands, while Aoraki / Mount Cook visits are more likely to form part of a South Island-centric itinerary

Other national parks or scenic landmarks visited by international visitors

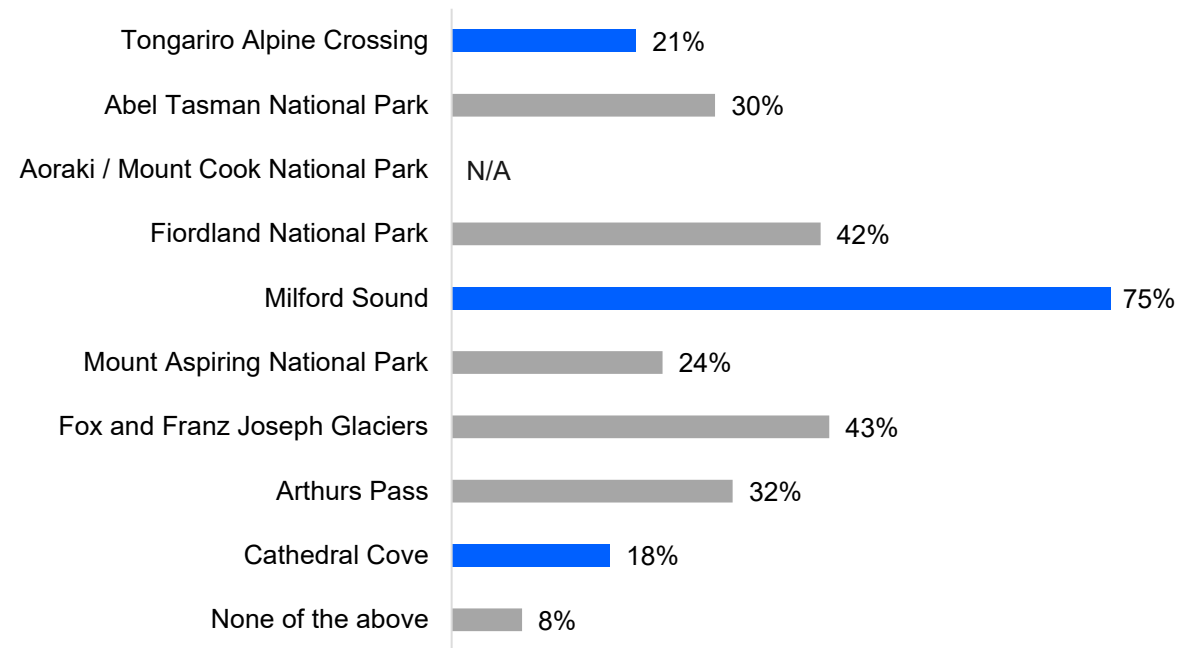
Mautohe Cathedral Cove Visitors



Visited all four locations (Cathedral Cove, Tongariro, Milford, Aoraki / Mount Cook)

18%

Aoraki / Mount Cook Visitors

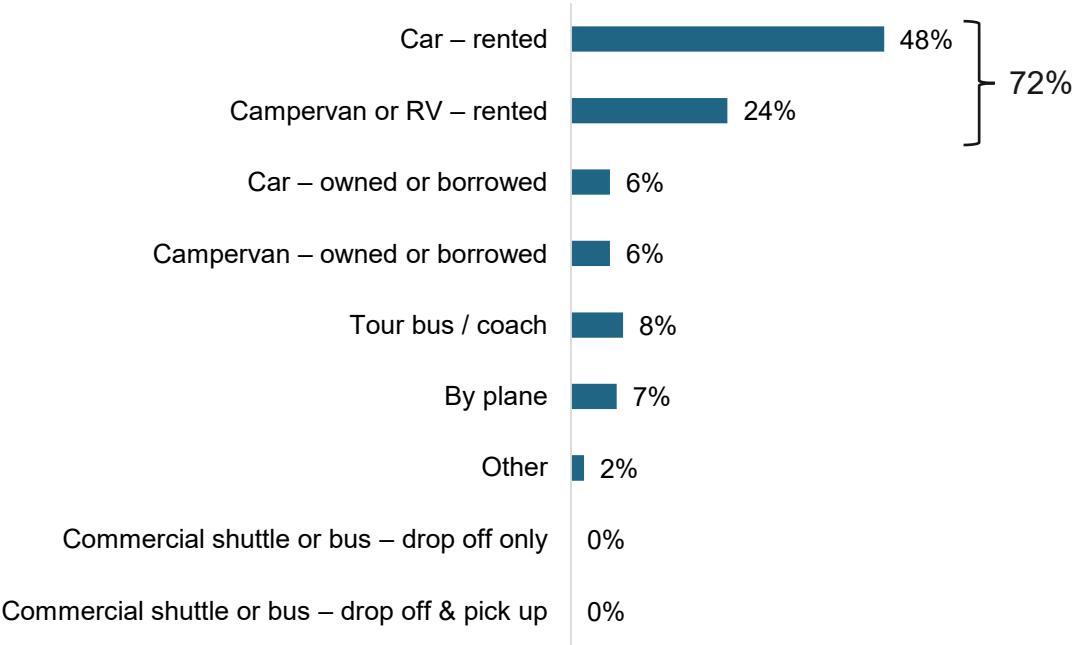


Visited all four locations (Cathedral Cove, Tongariro, Milford, Aoraki / Mount Cook)

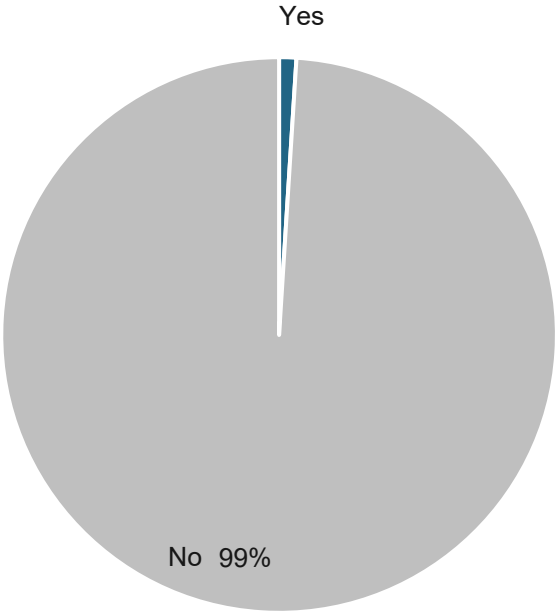
8%

The main way visitors get to Milford is either by rented car or campervan, and do not have New Zealand residents travelling with them

Mode of travel to Piopiotahi Milford Sound (international visitors)



% International visitors who have New Zealand residents with them



Objective 2

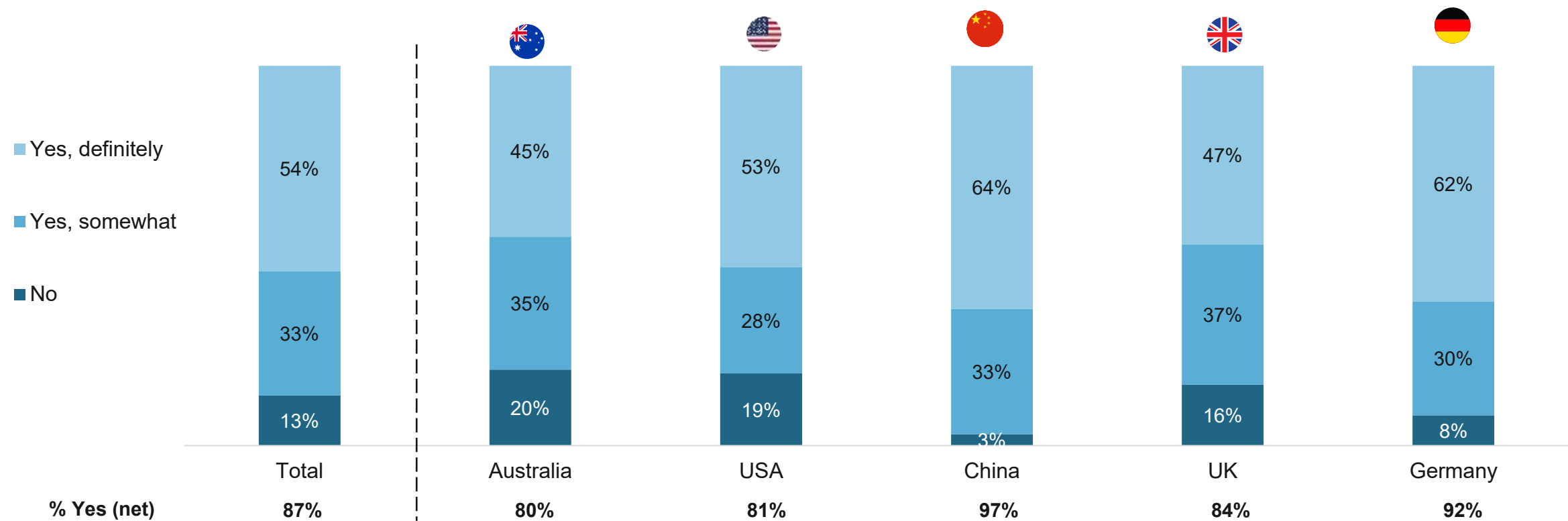
Willingness to pay

NB: Results in this section are among Active Considerers of New Zealand (ACs), i.e. our future visitors to New Zealand



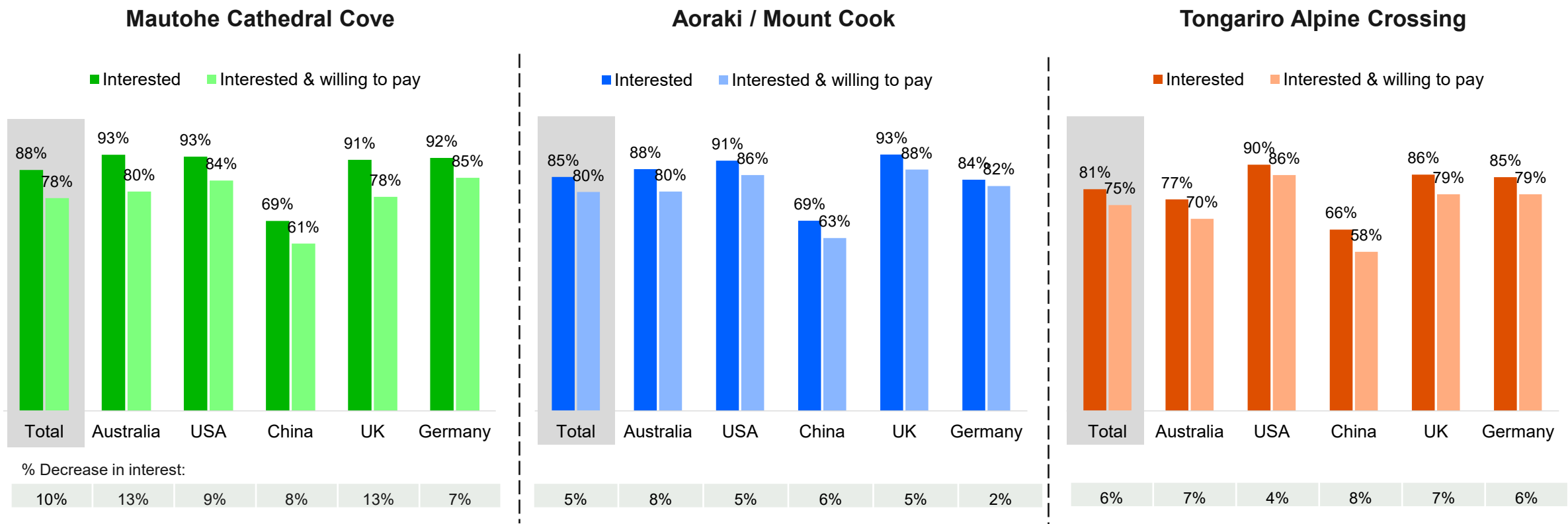
There is a wide acceptance of access fees for national parks and scenic landmarks among potential future visitors to New Zealand

Level of agreement with the statement: It is reasonable for visitors to pay to access national parks and scenic landmarks when visiting another country (% ACs)



Across all three locations, access fees do not substantially dampen strong interest in visiting, though Cathedral Cove is the most sensitive to potential declines

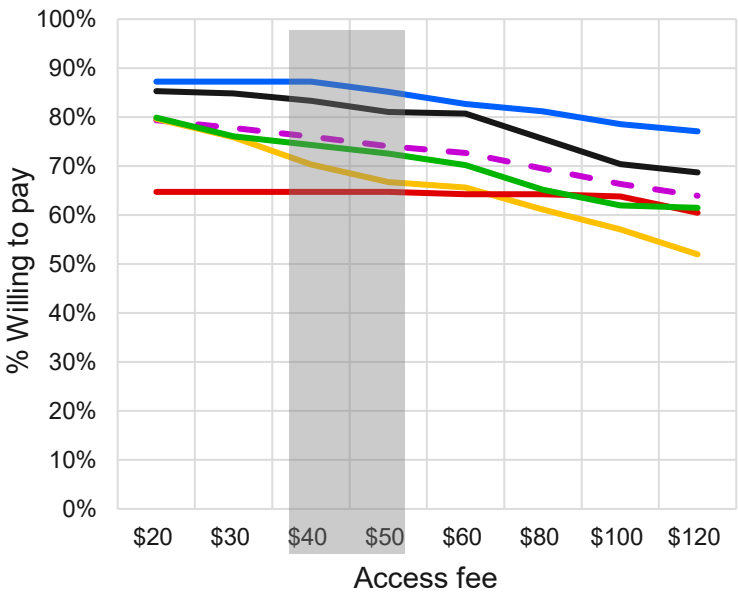
Interest in visiting the location and willingness to pay an access fee (% ACs)



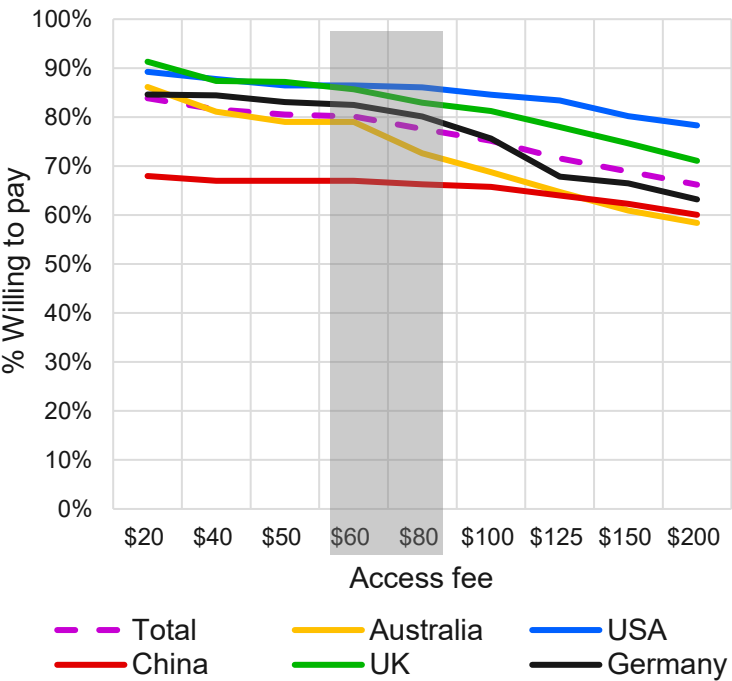
The optimal pricing range that could maximise revenue while preserving broad visitor acceptance sits in the \$40-\$60 range for Cathedral Cove and Tongariro, and \$60-\$80 for Aoraki / Mount Cook

Price willing to pay to visit (\$NZD, per person)

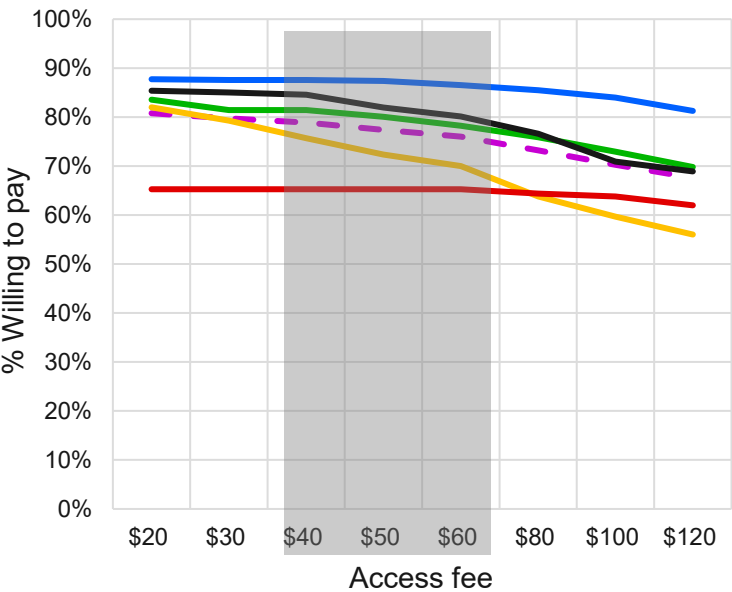
Mautohe Cathedral Cove



Aoraki / Mount Cook



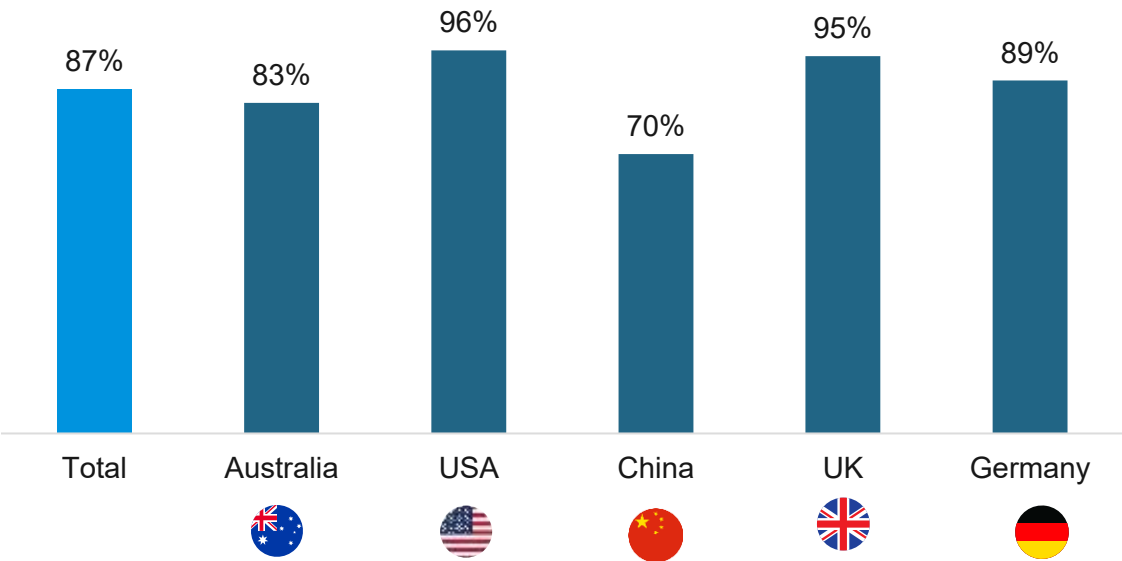
Tongariro Alpine Crossing



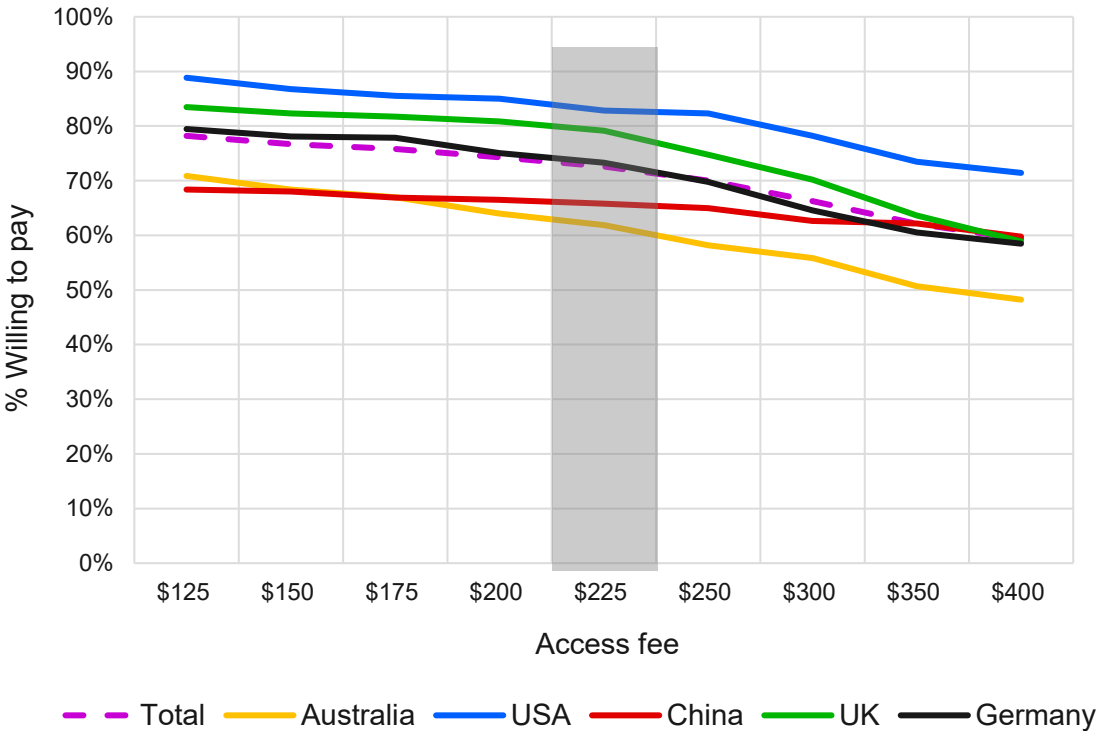
A multi-site pass, covering four locations, is highly attractive to most international visitors, supporting a viable bundled pricing model, with broad uptake sustained up to the \$225 price point



Consideration to purchase multi-site access pass (% ACs)

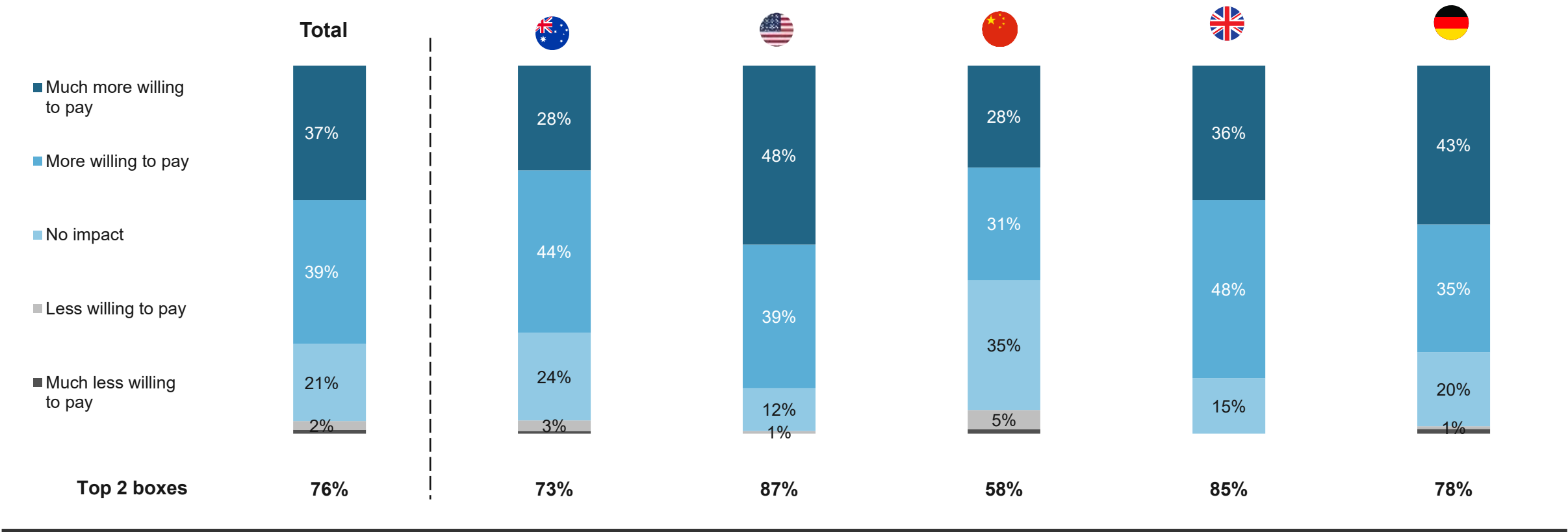


Price willing to pay (\$NZD, per person)



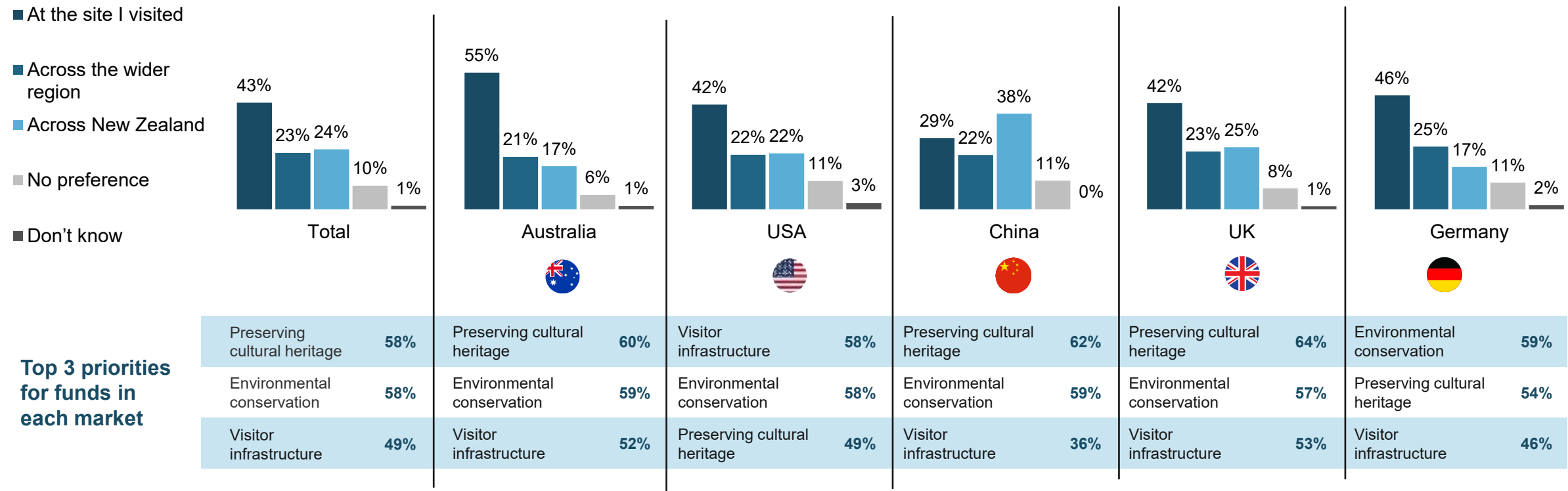
Communicating that the fee is being spent on conservation efforts has the potential to make the majority of visitors more comfortable and willing to pay the access fee

Willingness to pay to access fees if it is explicitly clear that the fee is fully spent on preservation of New Zealand parks and landmarks (% ACs)



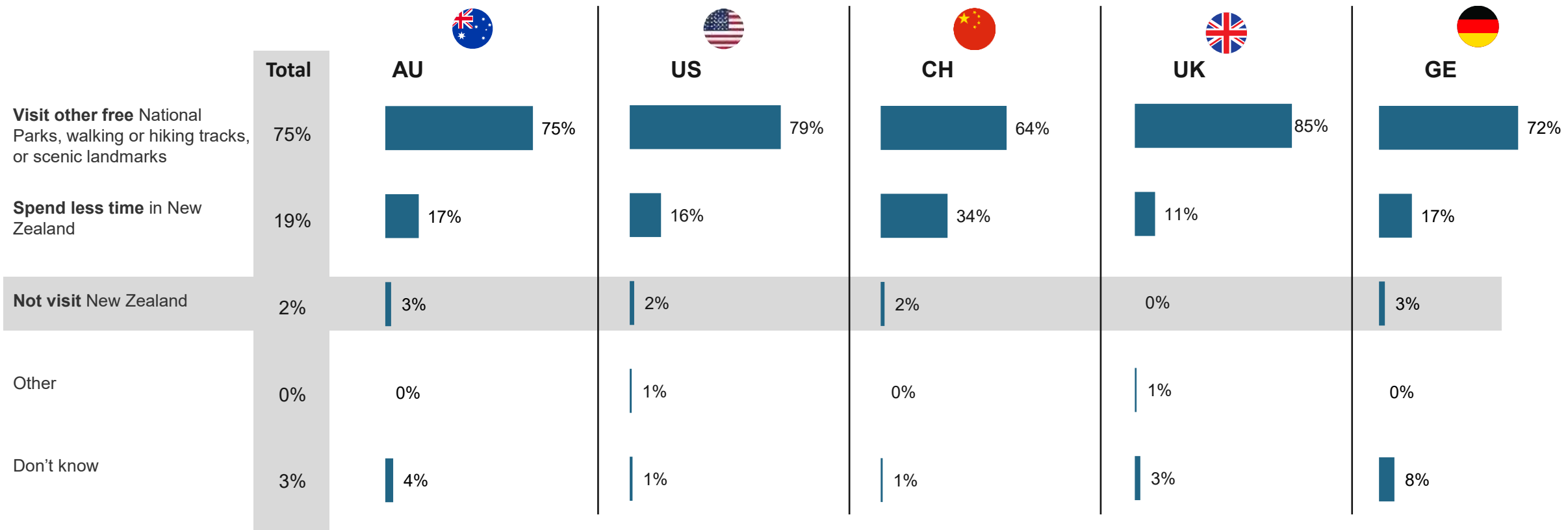
With the exception of China, visitors prefer access fees to be reinvested in conservation at the specific location rather than distributed nationally

Preference for how the funds generated through an access fee should be spent



Access fees are unlikely to deter visitation to New Zealand - price-sensitive visitors are more likely to substitute with another national park than forgo the trip entirely, though some may shorten their stay

If you did not want to pay the fee to visit a NZ national park / scenic landmark, what are you most likely to do? (% ACs)



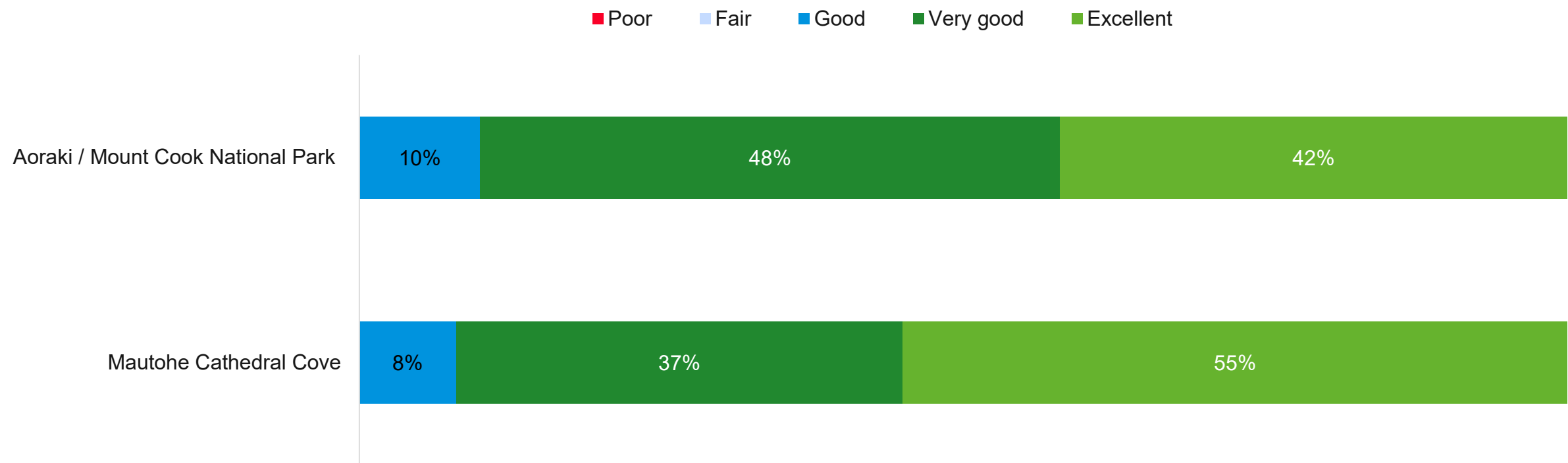
Objective 3

Visitor experience and expectations



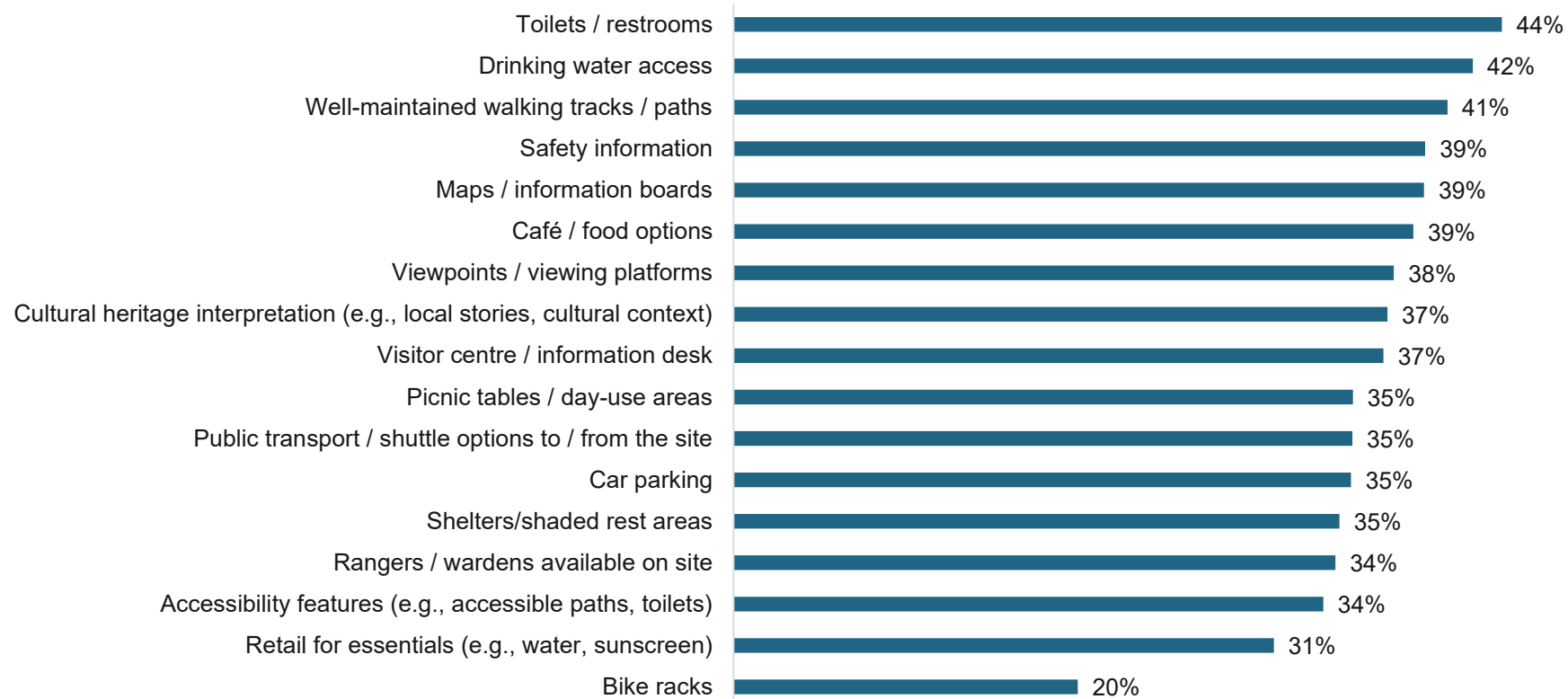
An overwhelming majority of visitors report a very good to excellent experience at both Cathedral Cove and Aoraki / Mount Cook National Park

Overall experience



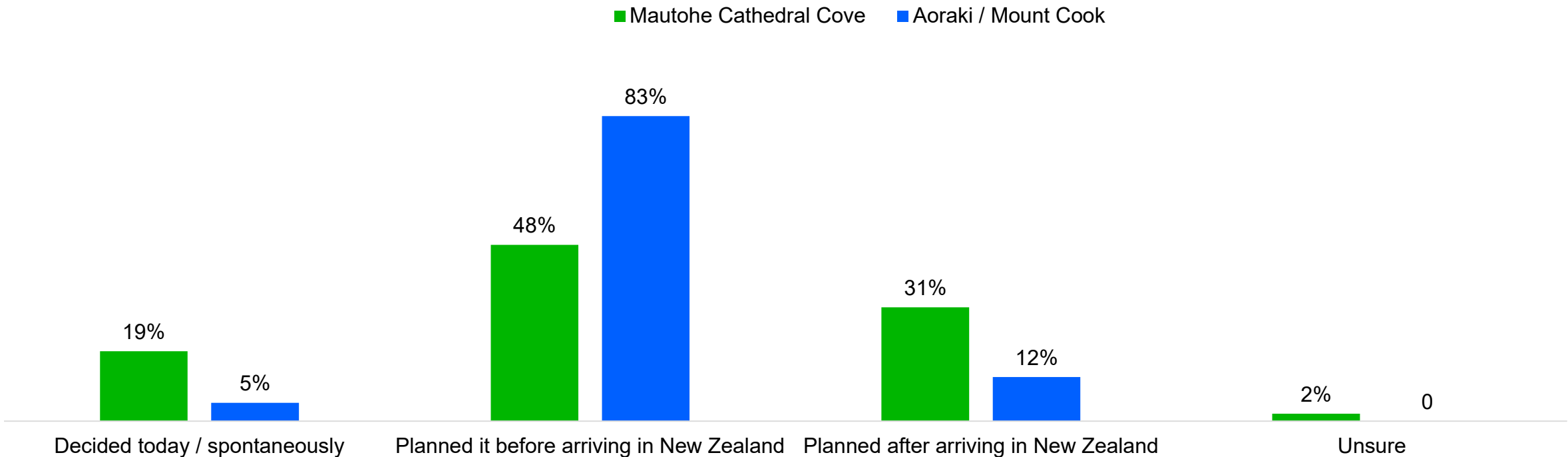
Paid access sets strong expectations that fees will fund essential infrastructure, such as toilets, drinking water access, track maintenance and information, rather than discretionary facilities

Facilities expected to be provided at national park or scenic landmark if charged access fee (% ACs, all markets combined)



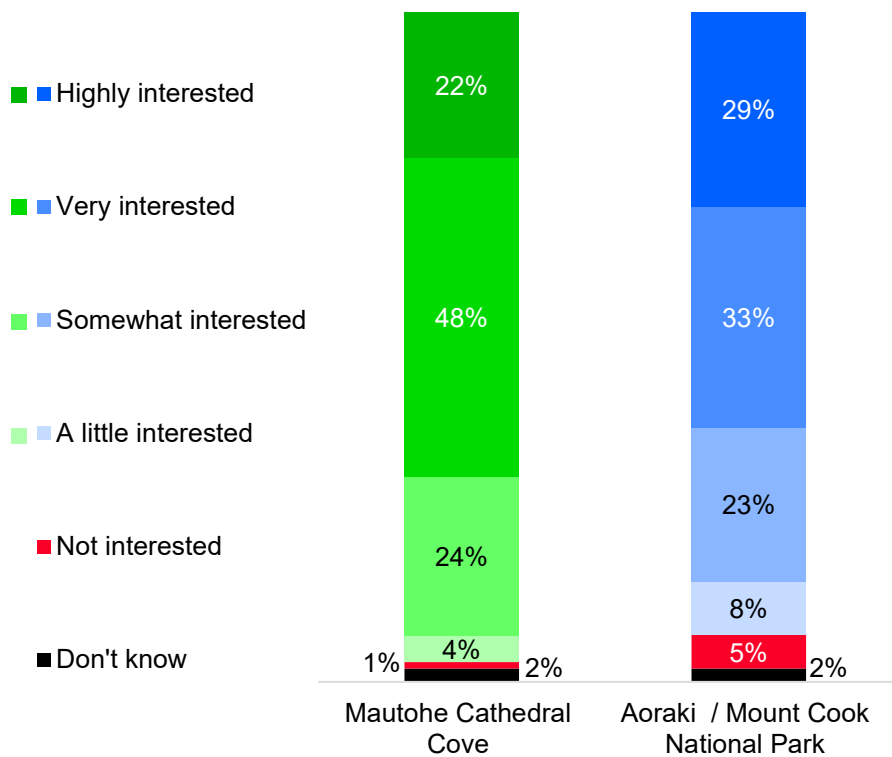
Visits to Aoraki / Mt Cook are typically planned well before arrival in New Zealand, whereas visits to Cathedral Cove are often spontaneous or planned within a short timeframe

When visitors decided to visit scenic locations and National parks (% Visitors to location)



While interest in cultural interpretation is high across both sites, Aoraki / Mount Cook delivers more strongly against these needs than Cathedral Cove

Interest in learning about Māori culture, local history, and the stories of the place



Satisfaction with the amount of information available at the site about Māori culture and the history of this place

