Notice is hereby given that an Ordinary meeting of the Great South Joint Shareholders Committee will be held on:

Date: Friday, 8 August 2025

Time: 9:00 am

Venue: Great South, 143 Spey Street, Invercargill

Great South Joint Shareholders Committee Agenda OPEN

MEMBERSHIP

Note:

Rob Scott, Mayor Southland District Council (Chair) A class shareholder Ben Bell, Mayor, Gore District Council A class shareholder Nobby Clark, Mayor, Invercargill City Council A class shareholder Nicol Horrell, Chair, Environment Southland A class shareholder Daryl Haggerty, Acting Chief Executive, Southern Institute of Technology B class shareholder Sheree Carey, Chief Executive Officer, Southland Chamber of Commerce B class shareholder Mark Paterson, General Manager, Mataura Licensing Trust B class shareholder Chris Ramsay, Chief Executive, Invercargill Licensing Trust B class shareholder Jackie Flutey, Chief Executive Officer, Community Trust South Member

Great South Joint Shareholders Committee 08 August 2025



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1 Apologies

At the close of the agenda no apologies had been received.

2 Leave of absence

At the close of the agenda no requests for leave of absence had been received.

3 Conflict of Interest

Joint Committee members are reminded of the need to be vigilant to stand aside from decision-making when a conflict arises between their role as a member and any private or other external interest they might have.

4 Extraordinary/Urgent Items

To consider, and if thought fit, to pass a resolution to permit the Joint Committee to consider any further items which do not appear on the Agenda of this meeting and/or the meeting to be held with the public excluded.

5 Confirmation of Council Minutes

Meeting minutes of Great South Joint Shareholders Committee, 13 June 2025



Great South Joint Shareholders Committee OPEN MINUTES

Minutes of a meeting of Great South Joint Shareholders Committee held in the Great South, 143 Spey Street, Invercargill on Friday, 13 June 2025 at 8:35 am. (8.35am-9.35am)

PRESENT

A class shareholders

Rob Scott, Mayor Southland District Council (Chair) Nobby Clark, Mayor, Invercargill City Council Nicol Horrell, Chair, Environment Southland

B class shareholders

Sheree Carey, Chief Executive Officer, Southland Chamber of Commerce (by video link) Daryl Haggerty, Acting Chief Executive, Southern Institute of Technology

Member

Jackie Flutey, Chief Executive Officer, Community Trust South by video link

IN ATTENDANCE

Trudie Hurst, Group Manager Community Engagement and Corporate Services, Invercargill City Council Vibhuti Chopra, Group Manager Strategy and Partnerships, Southland District Council Rachel Millar, General Manager Strategy, Policy and Science, Environment Southland Megan Seator, Policy Advisor, Southland Mayoral Forum Michal Gray, Democracy Advisor, Southland District Council lan Collier, Board Chair, Great South, Chami Abeysinghe, Chief Executive, Great South Suzanne Hotton, General Manager Finance, IT and Facilities, Great South

1 Apologies

There were no apologies.

2 Leave of absence

There were no requests for leave of absence.

3 Conflict of Interest

There were no conflicts of interest declared.

4 Extraordinary/Urgent Items

There were no Extraordinary/Urgent items.

5 Confirmation of Council Minutes

Resolution

Moved Mayor Clark, seconded Chair Horrell and resolved:

That the Great South Joint Shareholders Committee confirms the minutes of the meeting held on 9 May 2025 as a true and correct record of that meeting.

REPORTS

7.1 GREAT SOUTH UPDATE

RECORD NO: R/25/6/25919

CHAMI ABEYSINGHE, CHIEF EXECUTIVE, GREAT SOUTH PRESENTED THIS UPDATE.

DURING DISCUSSION THE MEMBERS SUGGESTED THAT AN AGENDA ITEM ON A REGIONAL APPROACH TO ALL S PRESENTED AT A FUTURE MEETING OF THE COMMITTEE.

RESOLUTION

MOVED MAYOR SCOTT, SECONDED MEMBER FLUTEY

THAT THE GREAT SOUTH JOINT SHAREHOLDERS COMMITTEE:

A) RECEIVES THE REPORT TITLED "GREAT SOUTH UPDATE".

CARRIED

7.2 GREAT SOUTH STATEMENT OF INTENT 2024-2027

RECORD NO: R/25/6/25920

DEMOCRACY ADVISOR, MICHAL GRAY PRESENTED THIS REPORT.

RESOLUTION

MOVED MAYOR CLARK, SECONDED MEMBER FLUTEY

THAT THE GREAT SOUTH JOINT SHAREHOLDERS COMMITTEE:

- A) RECEIVES THE REPORT TITLED "GREAT SOUTH STATEMENT OF INTENT 2024-2027".
- B) CONFIRMS RECEIPT OF THE SOUTHLAND REGIONAL DEVELOPMENT LTD (GREAT SOUTH) STATEMENT OF INTENT 2025-2028 AND THE SPACE OPERATIONS NEW ZEALAND LTD STATEMENT OF INTENT 2025-2028.

CARRIED

7.3 GREAT SOUTH DIRECTOR APPOINTMENTS

RECORD NO: R/25/5/24479

DEMOCRACY ADVISOR, MICHAL GRAY PRESENTED THIS REPORT. THE PURPOSE OF THIS REPORT WAS FOR THE COMMITTEE TO CONSIDER THE REAPPOINTMENT OF MR IAN COLLIER AND MR JEFFREY GRANT AS DIRECTORS OF GREAT SOUTH.

RESOLUTION

MOVED CHAIR HORRELL, SECONDED MAYOR CLARK

THAT THE GREAT SOUTH JOINT SHAREHOLDERS COMMITTEE:

- A) RECEIVES THE REPORT TITLED "GREAT SOUTH DIRECTOR APPOINTMENTS".
- B) DETERMINES THAT THIS MATTER OR DECISION BE RECOGNISED AS NOT SIGNIFICANT IN TERMS OF SECTION 76 OF THE LOCAL GOVERNMENT ACT 2002.
- C) DETERMINES THAT IT HAS COMPLIED WITH THE DECISION-MAKING PROVISIONS OF THE LOCAL GOVERNMENT ACT 2002 TO THE EXTENT NECESSARY IN RELATION TO THIS DECISION; AND IN ACCORDANCE WITH SECTION 79 OF THE ACT DETERMINES THAT IT DOES NOT REQUIRE FURTHER INFORMATION, FURTHER ASSESSMENT OF OPTIONS OR FURTHER ANALYSIS OF COSTS AND BENEFITS OR ADVANTAGES AND DISADVANTAGES PRIOR TO MAKING A DECISION ON THIS MATTER.
- D) APPROVES THE APPOINTMENT OF MR IAN COLLIER AND MR JEFFREY GRANT AS DIRECTORS OF SOUTHLAND REGIONAL DEVELOPMENT AGENCY LIMITED (GREAT SOUTH) FOR A TERM OF THREE YEARS BEGINNING ON 1 JULY 2025.

CARRIED

The meeting concluded at 9:35 pm	Confirmed as a true and correct record of a meeting of the Great South Joint Shareholders Committee held on 13 June 2025.
	DATE:
	CHAIRPERSON:

Letter of Expectation 2026/2027

Record no: R/25/7/35185

Author: Michal Gray, Democracy advisor

Approved by: Vibhuti Chopra, Group manager strategy and partnerships

☐ Decision ☐ Recommendation ☐ Information

Purpose

The purpose of this report is for the Great South Joint Shareholders Committee (the Committee) to consider the draft Letter of Expectation (LOE) 2026/2027 and recommend its endorsement to the Great South shareholders.

Executive summary

- This report has been prepared by Michal Gray, Democracy Advisor (Southland District Council) and Megan Seator, Policy Advisor (Southland Mayoral Forum).
- The Local Government Act allows for shareholders of a council controlled organisation to communicate their expectations to support the development of a statement of intent.
- The attached draft LOE supports the continuation of priorities and activities outlined in the Great South Statement of Intent 2025/2026.
- Following the Committee's consideration of this report, each shareholder is encouraged to endorse the LOE before delivery to Great South.

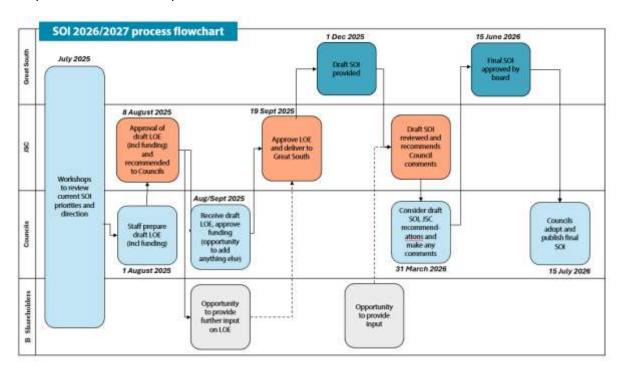
Recommendation

That the Great South Joint Shareholders Committee:

- a) receives the report titled "Letter of Expectation 2026/2027".
- b) determines that this matter or decision be recognised as not significant in terms of Section 76 of the Local Government Act 2002.
- c) determines that it has complied with the decision-making provisions of the Local Government Act 2002 to the extent necessary in relation to this decision; and in accordance with Section 79 of the act determines that it does not require further information, further assessment of options or further analysis of costs and benefits or advantages and disadvantages prior to making a decision on this matter.
- d) approves the draft Letter of Expectation 2026/2027 as contained in Attachment A and recommends that the Council Shareholders, Invercargill City Council, Southland District Council, Gore District Council and Environment Southland approve the Letter of Expectation.
- e) delegates the Chair authority to make any minor changes to the draft Letter of Expectation before it is sent to the Councils based on feedback from meeting.

Background

- In accordance with Schedule 8 from the Local Government Act 2002, council-controlled organisations (CCO) such as the Southland Regional Development Agency Ltd (Great South) are required to submit a Statement of Intent (SOI) to its shareholders on an annual basis. The SOI outlines the strategic direction and priorities of the CCO for following year. A letter of expectation (LOE) may be provided to the CCO by the shareholders to provide guidance and direction as the CCO prepares its SOI.
- 7 The process for the development of the SOI 2026/2027 is outlined below:



- In July 2025 Great South reached out to councils to offer workshops to go over the regional priorities and council-specific workstreams outlined in the current SOI. For reference, the regional priorities were originally informed by the August 2023 strategic workshop and subsequent LOE which intended to provide strategic direction for a three-year period.
- This three-year strategic direction was implemented to ensure alignment to councils' long-term plans and provide certainty for the operations of Great South (note: the 2026/2027 year is the third and final year of the three-year strategic cycle).
- Between the three-year strategic direction cycles, the annual LOE process provides for the reconfirmation of the work programme and allows for minor changes, if required.
- Staff have prepared the attached draft LOE based on the current regional priorities, the activities in the current SOI, and the outcomes of the July council workshops.

Issues

12 This decision is being made prior to local government elections being held in October 2025. There is a risk that this may be perceived as decisions being made ahead of new elected members

coming in, however, for Great South strategic certainty is required and new councils will be able to provide direction during workshops next year at the start of the new strategic cycle.

13 Councils have not started their annual plan process for 2026/2027 so they cannot guarantee funding in this LOE. However, the funding provided in this LOE is the indicative funding available through the LTPs.

Factors to consider

Legal and statutory requirements

14 Under section 64B of the Local Government Act 2002, shareholders of a council-controlled organisation (CCO) may provide a statement of their expectations.

Community views

No specific community views have been sought in relation to this matter, but each council's long term plan has undergone a thorough and extensive engagement.

Costs and funding

16 Great South have provided a shareholder investment budget for the 2026/2027 financial year in the 2025-2028 SOI (page 19).

Great South shareholder investment budget - 2026/2027

Core	\$ 2,138,498
Contract	\$ 1,641,527
Total	\$ 3,780,025

The four council shareholders have each budgeted funding in their long-term plans for 2026/2027. Note: annual allocations of LTP budgeted funding to Great South are subject to annual plan processes.

LTP budgeted funding for 2026/2027

Invercargill City Council	\$ 2,038,412
Southland District Council	\$ 1,296,827
Gore District Council	\$ 256,250
Environment Southland	\$ 213,850
Total funding	\$ 3,805,339

Policy implications

There are no immediate policy implications for councils should the Committee decide not to endorse the draft LOE and recommend it to the Great South shareholders at this time, other than procedural delays.

Analysis of Options

Option 1 – Consider the draft LOE and recommend its endorsement by the Great South shareholders.

Advantages	Disadvantages		
The recommended draft LOE conveys the expectations of the shareholders to Great South to support the preparation of the SOI.	Shareholders may prefer significant changes to Great South's strategic direction and workplan for 2026/2027.		
Shareholders will each consider the recommended draft LOE and at that point consider making minor amendments to matters relating to specific shareholders.			

Option 2 – Consider the draft LOE and does not recommend its endorsement by the Great South shareholders.

Advantages	Disadvantages
The Committee may wish to give other direction to Great South in preparation of the SOI.	 Missing an opportunity to provide input on the direction of Great South. Delays in the process resulting increased pressure on Great South to deliver within timeframes.

Assessment of significance

This matter may be considered significant for some shareholders determined by their respective significance and engagement policy.

Recommended option

25 Staff recommend that the committee approves the draft LOE and recommend it to the shareholders for endorsement.

Next steps

Following consideration of the draft LOE 2026/2027 and recommendation for endorsement by the Great South shareholders.

Assuming all shareholders individually endorse the draft LOE, the Committee will then approve 27 the final LOE at its meeting on 19 September 2025 and deliver it to Great South by the end of the triennium.

Attachments 27

- Draft Great South Letter of Expectation 2026 2027 4 Tale Great South Statement of Intent 2025-2028 4 Tale South Statement On Intent 2025-2028 4 Tale South Α









8 August 2025

Ian Collier Great South PO Box 1306 Invercargill 9840

Dear Ian

Great South Letter of Expectation 2026-2027

Introduction

I'm writing to you on behalf of the Great South Joint Shareholders as Chair of the Joint Shareholders Committee.

Thank you for another productive year supporting our region. I would like to formally acknowledge the great work that your team has done, which was recently summed up perfectly by the Associate Regional Development Minister, Mark Patterson:

"During my time in politics I have always enjoyed my engagement with the Southland community. The local politics is fought tough, but when it matters everyone comes together for the greater good of Southland. You do the work internally and come together with a compelling plan for central government. In my experience, no province in New Zealand is as cohesive as Southland.

I have always been impressed by the work done by Great South as the regional economic development agency. It is the gold standard by which I measure other provinces.

The agency's track record of bringing together business, iwi and local government, as well as identifying regional opportunities around a cohesive strategy, is second to none. It hasn't hit a home run every time but that is expected. There is always risk and reward balance required."

As we navigate through the continuum of change, it is comforting to know that as a Region we have a plan, and that we are all working together in the collective interest of Southland.

1

7.1 Attachment A Page 14

Legislative background

This letter of expectation (LOE) is written in accordance of s64B of the Local Government Act (LGA). While not mandatory, the delivery of LOEs to council-controlled organisations (CCO) is regarded as best practice. It provides guidance and direction to CCOs from their shareholders prior to preparation of their annual the statement of intent (SOI).

As you are aware, under s64(2) the purpose of a statement of intent is to:

- Publicly state the activities and intentions of the CCO for the year, and the objectives to which those activities will contribute;
- An opportunity for shareholders to influence the direction of the entity; and
- Provide a basis for the entity's governing body to be accountable to the shareholders for the entity's performance.

Regional priorities

In August 2023, Great South hosted a strategic planning workshop with its shareholders and board to gain collective agreement on long-term priorities for the region and Great South's activities. It was subsequently agreed and noted that the focus would be on the following regional strategic areas:

- o Regional development leadership
- o Business support & diversification
- o Regional Promotion
- o Net Zero Southland

In addition, for Great South to support a number of key enablers identified in the Beyond 2025 Southland Plan as being key to Southland's growth and sustainability, specifically:

- Data
- Housing
- Aquaculture
- Energy
- Forestry

Since these regional priorities were agreed in 2023, I note the new addition of agriculture to this list, as outlined in the Great South Statement of Intent 2025/2026. There has also been discussion around supporting investment for infrastructure needs in Southland.

7.1 Attachment A Page 15

Individual Shareholder Priorities

Priorities specific to each shareholder remain unchanged and have been previously outlined within the Great South Statement of Intent 2025/2026, with the exception of Invercargill City Council who, as a part of their contract funding requests that Great South progress (in order of priority):

- 1. Product packaging and capability development for tourism operators in Bluff;
- 2. The development and sharing of the Motupōhue Bluff story as part of the Murihiku Southland story;
- 3. Projects 8, 20, and 7 of the Te Taurapa o Te Waka Bluff Hill Experience.

Funding

	Total
Invercargill City Council	\$2,038,412
Southland District Council	\$1,296,827
Gore District Council	\$256,250
Environment Southland	\$213,850
Total	\$3,805,339

^{*}Please note that the table above is LTP budgeted funding and may be subject to variation through the local government annual plan process.

Next steps

On receipt of this LOE, the JSC requests that the Board provides a draft SOI by 1 December 2025. The JSC will then obtain input from shareholders, and provide joint feedback to you by 31 March 2026. This feedback will inform the final SOI which is expected to be received by June 2026.

Yours sincerely

Mayor Rob Scott

Chair - Great South Joint Shareholders Committee

cc: Chami Abeysinghe, Great South

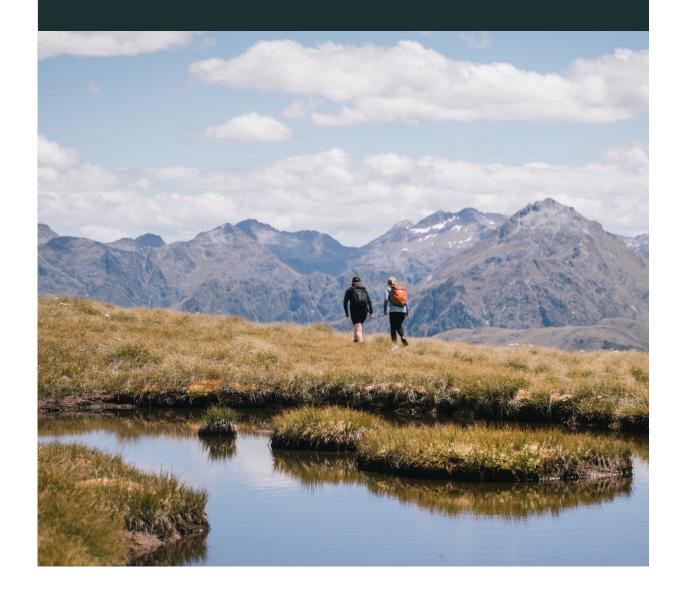
7.1 Attachment A Page 16

GREAT SOUTH C

Southland Regional Development Agency

Statement of Intent

2025 - 2028



7.1 Attachment B Page 17

COMPANY DIRECTORY

SOUTHLAND REGIONAL DEVELOPMENT AGENCY LIMITED TRADING AS GREAT SOUTH

PO Box 1306 Invercargill 9810 (03) 211 1400 www.greatsouth.nz

DIRECTORS

Ian Collier (Chair) Jason Franklin Jeff Grant Lucy Griffiths Peter Heenan Rachel Lindsay Maria Pera

REGISTERED OFFICE

Southland Regional Development Agency Limited 143 Spey Street, Invercargill

BANK Westpac New Zealand

AUDITORS

KPMG (on behalf of the Office of the Auditor General)

SHAREHOLDERS

Class A Shareholders Invercargill City Council Southland District Council Gore District Council Environment Southland

Class B Shareholders Invercargill Licensing Trust Mataura Licensing Trust Southland Chamber of Commerce Southern Institute of Technology

MEMBERS

Community Trust South

LEGAL STATUS

Southland Regional Development Agency Limited ("SRDA") was incorporated in New Zealand on 29 March 2019 under the Companies Act 1993 (NZBN 9429047359185).

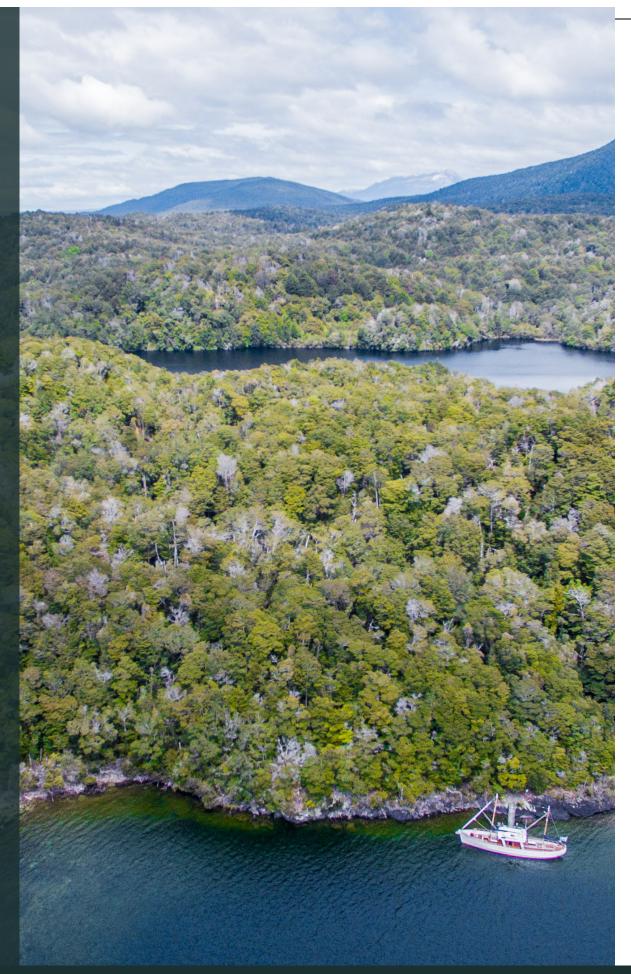
COMPANIES OWNED BY THE SOUTHLAND REGIONAL DEVELOPMENT AGENCY LTD.

Space Operations New Zealand Limited – 100% New Zealand Functional Foods Limited – 49%

PURPOSE OF THIS STATEMENT OF INTENT

In accordance with the requirements of Section 64(1) of the Local Government Act 2002, this Statement of Intent publicly states the planned activities, intentions and performance measures for Great South, Southland Regional Development Agency, for the next three years. It is written in response to the shareholders' letter of expectation, received 13 December 2024.

Great South is tasked with leading the future growth aspirations of Southland on behalf of its shareholders, stakeholders and the wider Southland community.



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- 6 How we operate
- 8 Our priorities

OUR WORK

- 10 Regional development leadership
- 12 Regional promotion
- 14 Net Zero Southland
- 16 Business support and diversification
- 18 Space Operations New Zealand

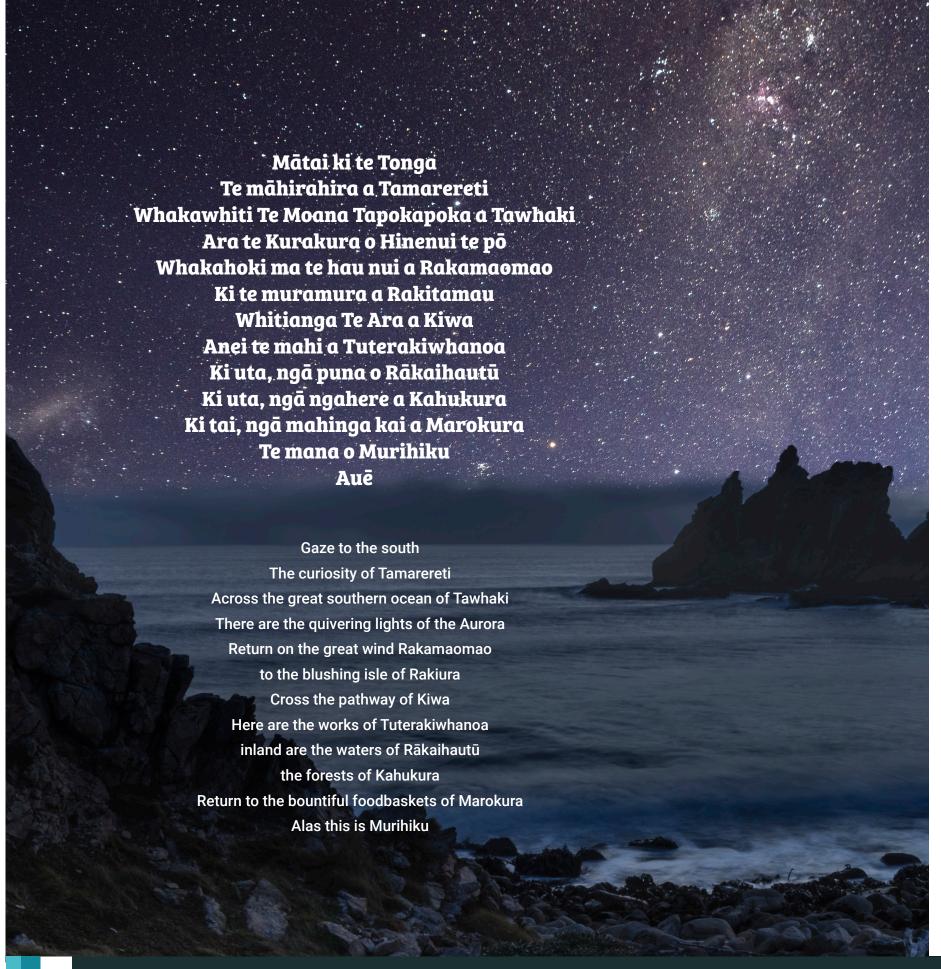
FINANCIAL STATEMENTS

- 19 Statement of comprehensive revenue and expense
- 20 Statement of financial position
- 21 Statement of cash flows
- 22 Accounting policies

25 Shareholder requirements

Great South Statement of Intent - 2025 - 2028 Great South **Statement of Intent** - 2025 - 2028

7.1 Attachment B Page 19



Foreword

It is my pleasure to present Great South's Statement of Intent for 2025-2028, a roadmap for Murihiku Southland's growth and resilience.

With clear priorities identified for the region, Great South continues to advocate strongly on behalf of Murihiku Southland to both local and central government. Certainty of funding from our councils has enabled us to focus on transformational projects, including aquaculture, tourism, and data-driven innovation, while ensuring we remain agile in a challenging economic environment.

The Government's recent focus on aquaculture has created exciting opportunities for our region. The establishment of five new Aquaculture Settlement Areas, spanning almost 9000 hectares, positions Southland at the forefront of this \$3 billion national growth sector. Further support, such as the \$2.2 million loan through the Regional Infrastructure Fund (RIF) to Ocean Beach, enhances Southland's role as a leader in sustainable seafood production.

Sustainability remains central to our mission. Recent changes to the Emissions Trading Scheme provide clarity for landowners, balancing forestry and agriculture to ensure both economic productivity and climate goals are met. Great South is also proud to have received recognition for leadership in sustainability, reflecting our commitment to creating a thriving, low-emissions future.

Our innovative initiatives, including Space Operations New Zealand Ltd (Space Ops NZ) and the Data and Insights Southland Hub (DISH), continue to position the region as a leader in technology and connectivity. These projects are creating high-value jobs, attracting investment, and showcasing Southland as a hub for cutting-edge innovation.

Guided by the Beyond 2025 Southland long-term strategy, we are advancing key opportunities that will shape Murihiku Southland's future. Initiatives such as the Te Taurapa o Te Waka – Motupōhue Visitor Experience highlight the transformative potential of tourism, while ongoing work in aquaculture and renewable energy strengthens our economic and environmental foundations.

Great South remains committed to driving sustainable growth and innovation while championing the interests of our community. Together, we are creating a resilient, forward-thinking region that offers opportunities for generations to come.



lan Collier Great South Board Chair

2 Great South Statement of Intent - 2025 - 2028 Great South Statement of Intent - 2025 - 2028

7.1 Attachment B

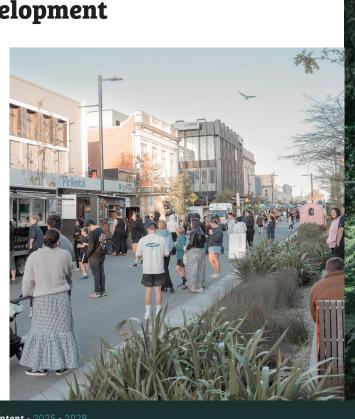


Our vision

Even better lives through sustainable regional development

As Murihiku Southland's regional development agency, Great South is responsible for economic development and promotion of the region. Our vision of 'even better lives through sustainable regional development' frames all the work we do, ensuring Murihiku Southland is the best place to live, work and visit. We want our region to be the best place to start and sustain a business, the best place to travel in, to host an event or conference, to study, migrate to, or invest in. By creating a region that is the best place in New Zealand to live, visit and work, we create a platform for the region to prosper – economically and in terms of vibrancy and liveability.

New Zealand has seen a shift in government, which means there will be changes to government policies. This will likely provide opportunities for regional development which Great South will pursue on behalf of the region. However, major industry changes driven by climate effects will continue to force a shift in activity and taking a sustainable approach in its widest sense (environmental, economic and social), will continue to be critically important.



Southland snapshot

NET EMISSIONS FOR 2022
4,947,505 tCO2e
14.8% decrease from 2018 baseline

CURRENT POPULATION
100,143

GEOGRAPHIC AREA
31,218 km²

MAIN INDUSTRIES BASED ON NUMBER OF EMPLOYEES

\$97,382



\$8.271b

Agriculture

كلا

Retail



5.3%

Manufacturing

Construction

Figures sourced from MBIE, Infometrics & Statistics New Zealand

WHO WE ARE

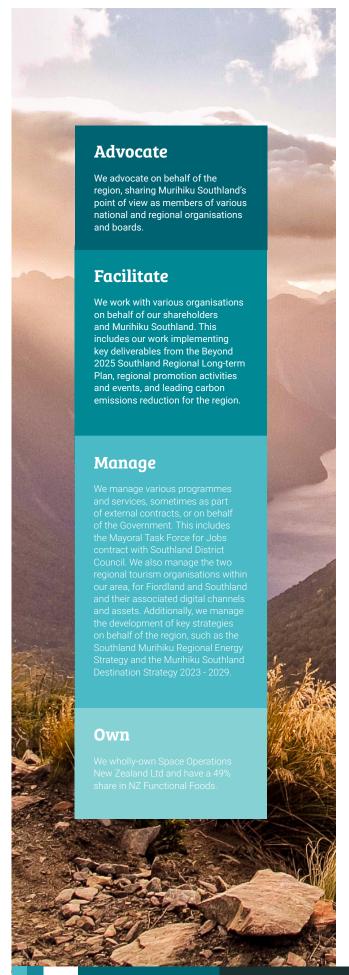
Great South **Statement of Intent** - 2025 - 2028

Great South **Statement of Intent** - 2025 - 2028

WHO WE ARE

5

7.1 Attachment B



How we operate

Great South works for the benefit of the whole region, placing equal importance on Southland's people, place, environment and economy.

With the future of New Zealand's Aluminium Smelter at Tiwai Point now confirmed for the next 20 years, we understand this will be a time of unprecedented change for Southland and strong leadership is required.

ROLES OF GREAT SOUTH

Our role varies depending on the nature of the project or initiative we are involved with. We are always building on relationships with sector representatives and key Southland stakeholders, and now that we are more established as an organisation, increasingly our role is to lead.

Our roles may be:

Advocate

Facilitate

Manage

Own

PARTNERING FOR SUCCESS

The future success of our region depends on partnerships. Great South works closely with stakeholders and the wider community and is committed to telling the shared stories of Murihiku Southland's people and place. Great South is committed to meeting its obligations under Te Tiriti o Waitangi and collaborates with the four Murihiku-based Rūnaka on numerous projects.

SUSTAINABLE FOCUS

Great South is a certified carbon conscious organisation and is taking positive action towards becoming carbon neutral and integrating sustainable considerations into all activities, including purchasing decisions and operational practises. We will set an example for the region including for businesses, stakeholders and communities we work with.

TE REO MĀORI

We will seek opportunities to support and raise the presence of Te Reo Māori through our activities and our day-to-day operations. This includes:

- A commitment to facilitating the upskilling of our team in both Te Reo and Tikanga Māori
- Introducing Te Reo into communications and marketing material where appropriate
- Incorporating Te Ao Māori into our business growth work as appropriate

PEOPLE AND CULTURE

The most valuable asset at Great South is our people. We are committed to creating a positive work environment and ensuring staff skills are relevant and up to date, allowing our people to thrive. A key focus will be to embed our internal organisation values:

- respect each other's contribution
- work together to achieve great things for our region
- · care for each other and our place
- · enjoy work and have fun

HEALTH AND SAFETY

Great South will take every practicable step to ensure the health and safety of our employees, contractors, visitors and attendees at events we manage.

OPERATIONAL EFFICIENCIES

In line with best management practice, we seek continuous improvement, improving processes and IT systems, to allow staff to operate in the most effective manner.

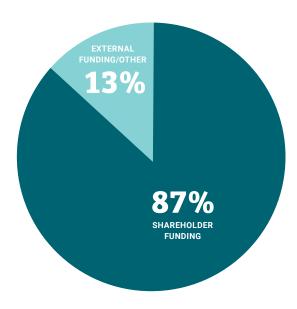
We continue to assess each purchasing decision and contract negotiation to ensure it can withstand a level of scrutiny as expected in the public sector.

HOW WE ARE FUNDED

Great South receives its primary funding from its shareholding councils. It has also successfully secured funding from commercial and government partners. Examples of this include:

- MBIE and Callaghan Innovation for the Regional Business Partner Network (RBP).
- · Commercial engagements

Great South also recieves funding from Community Trust South to undertake impetus and investigation activities. **Our revenue sources for 2025-2026**





WHO WE ARE

Great South **Statement of Intent** - 2025 - 2028

Great South Statement of Intent - 2025 - 2028

WHO WE ARE

/

7.1 Attachment B Page 2

Our priorities



Regional development **leadership**

Great South provides leadership for the region by facilitating the implementation of the Beyond 2025 Southland Long Term Plan and through advocacy, writing submissions and representing Murihiku Southland nationally.





Business support and diversification

Great South supports the growth of the business sector in Murihiku Southland and investigates and aids opportunities to diversify the economy. We also support the attraction and retention of a skilled workforce to our region which will support new and existing industries.







Regional **promotion**

Great South promotes Murihiku Southland as a great place to live, work and visit. We prioritise destination management and work to develop our regional tourism sector in a way that brings benefit to our people and place. We also manage and support events that attract visitors to our region.





Net ZeroSouthland

Great South works with businesses across Murihiku Southland to address carbon emissions. Subject to external funding, we will facilitate and support businesses to make reductions, as the region heads towards being carbon neutral by 2050.

OUR WORK

Great South **Statement of Intent** - 2025 - 2028

Great South **Statement of Intent** - 2025- 2028

OUR WORK

7.1 Attachment B Page 23

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9

Regional development leadership



Regional strategic planning

Great South leads the implementation of the Beyond 2025 Southland Long-Term Plan, ensuring regional aspirations are backed by the infrastructure and policies needed to achieve them. By focusing on aquaculture, housing, and data, we unify regional efforts for a clear and consistent voice. Our work in developing strategies, feasibility studies, and plans ensures alignment with central and local government priorities, maximising positive outcomes for Murihiku Southland.



Advocacy

OUR WORK

Great South ensures Murihiku Southland's needs and priorities are heard at the highest levels. By advocating with central government and by submitting on national consultation processes we will ensure that Murihiku Southland will achieve impactful outcomes in agriculture, housing, roading, forestry policy, and infrastructure investment. Regular engagement with central agencies and well-targeted submissions deliver tangible benefits that directly support the region's growth and success.



Data and insights

Great South is a trusted provider of critical data and insights that underpin effective regional planning and investment decisions. Through the Data and Insights Southland Hub (DISH), we deliver centralised, up-to-date dashboards and analysis to inform decision making. By continuously refining this resource and collaborating with central government, we address economic challenges and enable smart, data-driven decisions for Murihiku Southland



Murihiku Southland representation

Great South is a tireless advocate for Murihiku Southland, ensuring the region's strengths and opportunities are recognised on regional, national and international stages. Our active participation in forums, organisations, boards, conferences, and trade shows positions Murihiku Southland as a leader, building connections that drive growth and investment.

Performance measures

Regional development leadership performance measures

DESCRIPTION	KPI 2025-26	KPI 2026-27	KPI 2027-28
Data and Insights Provide up-to- date and accurate data and insights to inform decision making via development of a schedule of regular reports through Data Insights Southland Hub (DISH).	Schedule of data reports are produced across three focus areas including; Housing, Economic andTourism. Evaluate options for the storage & use of Geospatial Data and the use of Al data analysis tools.	Schedule of data reports are produced across three focus areas including; Housing, Economic and Tourism.	Schedule of data reports are produced across three focus areas including; Housing, Economic and Tourism.
Advocacy and Submission Advocate for and/or prepare submissions and funding applications for issues of importance to the region	Prepare a minimum of two submissions on issues of regional significance. Advocate for increased mobile coverage and reliable terrestrial fiber optic cable services for all of the region. Support councils and stakeholders to apply for Government funds as applicable.	Prepare a minimum of two submissions on issues of regional significance. Advocate for increased mobile coverage and reliable terrestrial fiber optic cable services for all of the region Support councils and stakeholders to apply for Government funds as applicable.	Prepare a minimum of two submissions on issues of regional significance. Support councils and stakeholders to apply for Government funds as applicable. Support the development of reliable high capacity global connectivity.
Housing Facilitate regional coordination of housing and implement priorities from the Murihiku Southland Housing Action Plan	 Facilitate regional coordination of housing including delivery of two projects. Support individual Councils with their housing planning (including Spatial Planning) considering current and future community and industry needs. 	Review Murihiku Southland Housing Action Plan. Facilitate regional coordination of housing including delivery of two projects. Support individual Councils with their housing planning considering current and future community and industry needs.	Facilitate regional coordination of housing including delivery of two projects. Support individual Councils with their housing planning considering current and future community and industry needs.
Aquaculture Facilitate and develop a regional approach to realise the benefits of Aquaculture as a diversification opportunity and implementation of The Regional Aquaculture Strategy/Plan.	Implement agreed actions (max 2) from the Regional Aquaculture Strategy. Coordinate actions needed from councils and others to achieve aspirations as per the Regional Aquaculture Strategy.	Implement agreed actions (max 2) from the Regional Aquaculture Strategy. Coordinate actions needed from councils and others to achieve aspirations as per the Regional Aquaculture Strategy	Implement agreed actions (max 2) from the Regional Aquaculture Strategy. Coordinate actions needed from councils and others to achieve aspirations as per the Regional Aquaculture Strategy.

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OUR WORK

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Regional promotion



Destination marketing

Great South is the driving force behind showcasing Southland and Fiordland as must-visit destinations. Through platforms such as southlandnz.com and fiordland.org.nz, along with targeted campaigns in domestic and international markets, we ensure the region's unique appeal is recognised. Collaborating with key partners such as Tourism NZ, Air New Zealand, and Invercargill Airport, we advocate for regional connectivity and investment. Southlandnz.com serves as a vital hub for local businesses and event organisers while providing practical travel information to visitors.



Tourism product and destination development

Great South is at the forefront of transforming Murihiku Southland into a premier tourism destination. Through the Murihiku Southland Destination Strategy 2023–2029, we are spearheading initiatives that highlight the region's unique strengths, such as establishing Southland as a food tourism hub, gaining International Dark Sky Sanctuary status for Fiordland National Park, promoting sustainable tourism, and advancing tourism development in Motupōhue Bluff. These projects are critical to ensuring Murihiku Southland stands out on the global tourism map.

OUR WORK



Business events

Great South is unlocking the potential of business events to drive year-round visitation and economic growth for Murihiku Southland. As Business Events Southland, we have developed a dedicated strategy and will proactively seek national and international events. By establishing the region as a premier business events destination, we are creating new opportunities that benefit local businesses, accommodation providers, and the wider community.



Invercargill City Centre activation

A thriving Invercargill city centre is vital to the prosperity of Murihiku Southland, and Great South is proud to play a leading role in its revitalisation. In partnership with Invercargill City Council, we deliver events and activities that energise the CBD, attract visitors, and foster community engagement. We also support event organisers with design and promotion, ensuring these events reach wide audiences and bring tangible benefits to the city.

Performance measures

Regional promotion performance measures

DESCRIPTION	KPI 2025-26	KPI 2026-27	KPI 2027-28
Consumer Marketing Promote Murihiku Southland as a year- round destination for travellers from New Zealand, Australia and other key markets resulting in more visitors		Ensure 85% of website traffic comes from key markets in NZ, Australia, North America, Europe, Asia with 2 partnered digital campaigns	Ensure 85% of website traffic comes from key markets in NZ, Australia, North America, Europe, Asia with 2 partnered digital campaigns
Media Increase positive travel media coverage for Murihiku Southland, promoting the region's diverse activities and experiences and drive regional spread, growth and seasonality	3 media famils 15 media results and where possible measurement of reach and equivalent advertising value (EAV)	3 media famils 15 media results and where possible measurement of reach and equivalent advertising value (EAV)	3 media famils 15 media results and where possible measurement of reach and equivalent advertising value (EAV)
Showcasing our region Trade Events, Trade Famils and TRENZ.	 Attend 5 trade shows. Attend 2 partnered famils 2 Murihiku itineraries in line with Milford Opportunities Project pillars supporting regional and seasonal spread 	Attend 5 trade shows. Attend 2 partnered famils 2 Murihiku itineraries in line with Milford Opportunities Project pillars supporting regional and seasonal spread	Expand on trade presence to enable growth of seasonal and regional offers.
New Experiences	Introduce1 new iwi partnered experience. Establish local cruise network	Further iwi partnered experience developed	Identify gaps in regional experiences and build capability to fill these gaps
Business Events Develop Murihiku Southland as a Business Events destination in line with Business Events strategy	Attend min 3 conference events Events sales calls	Attend min 3 conference events Events sales calls	Continue to solidify Invercargill's and the Murihik regional Business events offer targeting seasonal gap in capacity.
Regional Events Calendar Maintain southlandnz.com website calendar listings for regional events	10% increase on number of events listed 10% increase on number of overall page views 15% increase on number of overall page views from within Southland	10% increase on number of events listed 10% increase on number of overall page views 15% increase on number of overall page views from within Southland	Developing and building awareness around regional events
Unmissable Regional Events	Support delivery of Burt Munro Challenge (BMC) Identify areas to develop capability of the BMC	Support delivery of building capability for Burt Munro Challenge	Continued support building awareness of major events i line with event and regional strategy including building visitation
Regional Marketing of events	Six cluster events Four seasonal campaigns Marketing of unmissable events	Six cluster events Four seasonal campaigns Marketing of unmissable events	Six cluster events Four seasonal campaigns Marketing of unmissable events
Destination Development Progress projects from the Murihiku Southland Destination Strategy (MSDS)	Progress 3 projects from the Murihiku Southland Destination Strategy (MSDS)	Progress 3 projects from MSDS which includes delivering the Murihiku Southland Sustainable Tourism programme – identified with deliverable outcomes.	Continue to implement MSE aligning with areas where funding is available around community outcomes.

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OUR WORK

Business support and diversification



Business diversification

Great South is a catalyst for business growth and resilience in Murihiku Southland. We empower local businesses to explore diversification opportunities and develop actionable plans to bring these to life. Through targeted feasibility studies, we attract new and complementary businesses to the region, strengthening existing industries and driving innovation to support Murihiku Southland's economic future.



Economic diversification

Great South drives innovation and growth by supporting key opportunities such as Space Operations New Zealand Limited, aquaculture, and data centres. Our efforts focus on attracting new investment to bolster both emerging and existing businesses, fostering a resilient and diversified economy for Murihiku Southland.Partnering with Councils, we are investigating the impacts of unrestricted forestry while conducting ongoing analysis of livestock numbers, forestry growth, and water allocation. Our efforts ensure the sector's sustainability and long-term success.



Support the agriculture sector

As the backbone of Murihiku Southland's economy, agriculture remains a key focus for Great South. We work closely with farmers to explore land-use change opportunities and support informed decision-making.



Southland Youth Futures and the Mayoral Taskforce for Jobs

Great South is committed to fostering youth employment and development in Murihiku Southland. Subject to funding, we plan to continue delivering the Southland Youth Futures Programme in 2025, connecting young people with the diverse job opportunities available in the region and helping employers build their future workforce.

Under the Mayors Taskforce for Jobs (MTFJ) contract with Southland District Council, we've supported young people under 25 into employment, education, and training. This initiative has created meaningful pathways for youth by working collaboratively with local employers and leveraging the nationwide MTFJ network. Our focus remains on empowering young people and building a skilled workforce that supports Murihiku Southland's

Performance measures

Business support and diversification performance measures

DESCRIPTION	KPI 2025-26	KPI 2026-27	KPI 2027-28
Business in Southland - A regional guide Resource document that outlines useful information for new & potential businesses to the region.	Maintain the regional guide to support new businesses to Southland.	Review and change the regional guide as needed.	Review and change the regional guide as needed.
Agriculture Support agricultural sector land- use and support farmer decision making	Undertake analysis of relevant agricultural sector data to feed into the Regional Emissions Report for 2026. Investigate opportunities for new high value crops and establish links into new and emerging industries. Develop a Murihiku Southland Agriculture Strategy alongside key stakeholders which also looks at new farm revenue opportunities.	Undertake analysis of relevant agricultural sector data to feed into the Regional Emissions Report for 2027. Identify suitable locations for crop growing and establish the critical scale required to optimize opportunities.	Undertake analysis of relevant agricultural sector data to feed into the Regional Emissions Report for 2028.
Forestry Support further investigation of the impacts and possible opportunities associated with unrestricted forestry	Provide data and insights relating to changing land use and the impacts of carbon forestry. Identify new opportunities to convert forestry waste low grade logs into biomass fuel supply. Advocate for the establishment of a Regional Forestry plan and for value added wood processes.	Provide data and insights relating to changing land use and the impacts of carbon forestry. Continue to grow opportunities to convert forestry waste low grade logs into biomass fuel supply. Undertake and complete a Murihiku Regional Forestry Strategy focused on high value products for domestic and export markets.	Provide data and insights relating to changing land use and the impacts of carbon forestry. Continue to grow opportunities to convert forestry waste into biomass fuel supply.

OUR WORK Great South Statement of Intent - 2025 - 2028

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OUR WORK

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Net Zero Southland



Encourage low impact industry

Great South is driving Murihiku Southland's transition to a low-emissions future. By providing robust data and insights, we enable informed decision-making that supports the region's net zero emissions goals by 2050. We actively encourage the development of new industries that address climate change and emissions reduction targets, fostering sustainable growth for the region.



Monitor emissions

OUR WORK

Since 2018, Great South has led the way in monitoring Murihiku Southland's annual emissions, providing a crucial baseline for measuring progress toward a low-emissions future. We will continue to track and report on regional emissions, sharing insights with regional leaders and the public to drive informed action and accountability.



Sustainable tourism destination management

Sustainability is at the heart of the Murihiku Southland Destination Strategy, and Great South leads efforts to position the region as a model for sustainable tourism. We work with key partners to implement environmental stewardship projects, ensuring Murihiku Southland remains a thriving and responsible destination for years to come.



Energy planning

Great South is driving the implementation of the Southland Murihiku Regional Energy Strategy 2022–2050, ensuring the region transitions to a sustainable energy future. As part of this work, we will prepare reports on biogenic capture and use, as well as woody biomass availability, providing valuable insights to support informed energy planning and development.

Performance measures

Net Zero Southland performance measures

DESCRIPTION	KPI 2025-26	KPI 2026-27	KPI 2027-28
Monitor Emissions Complete annual regional emissions reporting as soon as national monitoring data becomes available	Produce the Regional Emissions Report for 2024 as soon as national monitoring data becomes available	Produce the Regional Emissions Report for 2025 as soon as national monitoring data becomes available	Produce the Regional Emissions Report for 2026 as soon as national monitoring data becomes available
Net Zero Planning Implement the Net Zero Southland Plan and Emissions Reduction	Evaluate the Southland Regional Emissions Reduction against the 1990 emissions and report on the findings by September 2025. Seek public feedback on the revised Net Zero Southand Plan (2025) and publish the final report by March 2026.	Implement Net Zero Southland Strategy and support regional climate change strategic planning.	Implement Net Zero Southland Strategy and support regional climate change strategic planning and progress monitoring.
Implementation of the Regional Energy Strategy	Support the Regional Energy Project Implementation including New Renewable energy projects, energy efficiency, wind, solar, biomass and methane recovery and use cases.	• Implement 2 actions from the reports.	• Implement 3 actions from the reports.

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OUR WORK

Space Operations New Zealand

Established by Great South in 2021, Space Operations New Zealand Limited (SpaceOps NZ) is a wholly owned subsidiary of Great South and a Council Controlled Trading Organisation (CCTO). As such, SpaceOps NZ presents its own Statement of Intent and associated financials to its shareholding councils. Its purpose is to meet the growing demand of the international small satellite (smallsat) community, positioning Murihiku Southland at the forefront of global space technology.

SpaceOps NZ owns and operates the Awarua Satellite Ground Station, Aotearoa New Zealand's only commercial low Earth orbit satellite ground station. Hosting antennas for international customers, the station provides critical southern hemisphere ground segment support for space agencies and commercial satellite operators. The satellites supported by Awarua are utilised for a wide range of applications, including tracking shipping containers, measuring the atmosphere, imaging the Earth, calibrating satellite navigation systems, and delivering internet services.

Awarua plays a key role in supporting international launch companies, including Rocket Lab, founded by Invercargill's Sir Peter Beck. As the first station with spacecraft visibility on the western Pacific Ocean, Awarua continues to attract global interest, with two international space businesses now based in Invercargill.

Recent developments have further cemented Awarua's position as a leader in space operations. In collaboration with Lockheed Martin Australia, two new 11-metre antennas have been added as part of the Trans-Tasman SouthPAN (Southern Positioning Augmentation Network) project. This initiative will enable centimetre-level positioning accuracy across New Zealand and Australia, enhancing smartphone capabilities for both countries. The antennas are supported by a mission operations centre in Invercargill, reinforcing the region's growing status as a space technology hub.

In July 2023, SpaceOps NZ expanded its operations by taking over Auckland University of Technology's radio astronomy facilities at Spark's Warkworth Satellite Earth Station. This acquisition includes two large antennas, measuring 12 metres and 30 metres in diameter. The 12-metre antenna is instrumental in pinpointing New Zealand's location within a couple of millimetres by receiving radio waves from some of the universe's most distant objects. Meanwhile, the 30-metre antenna extends SpaceOps NZ's capabilities into radio astronomy and communications with deep space spacecraft.

While its core business has been providing telecommunications to spacecraft orbiting 400 to 600 kilometres above Earth, SpaceOps NZ is now poised to play a key role in interplanetary exploration. By supporting both commercial and scientific missions, the company is advancing New Zealand's role in the global space industry, driving technological innovation, and creating high-value opportunities for the region.

Statement of comprehensive revenue and expense

For the 12 months to June

	2025/26	2026/27	2027/28
	Budget	Budget	Budget
Revenue			
Shareholder Investment			
Core	2,066,182	2,138,498	2,213,346
Contract	1,641,527	1,641,527	1,641,527
Total	3,707,709	3,780,025	3,854,873
Other Revenue			
Service Revenue	1,118,818	621,438	272,898
Project Revenue	200,000	200,000	200,000
Total Other Revenue	1,318,818	821,438	472,898
Total Revenue	5,026,527	4,601,463	4,327,771
Expenditure			
Project and Service Expenditure			
Regional Economic Development	1,223,228	1,029,989	1,050,864
Business Support Services	508,343	279,664	82,375
Regional Tourism Development	738,947	755,791	767,521
Regional Event Delivery	494,341	490,067	362,709
Total Project Expenditure	2,964,859	2,555,512	2,263,468
Core expenditure			
Directors Fees	176,000	176,750	177,519
Employee Expense	1,121,105	1,107,086	1,134,763
Depreciation and Amortisation	55,000	50,000	50,000
Other Expenses	705,690	723,332	741,415
Total Core Expenditure	2,057,795	2,057,168	2,103,697
Total Expenditure	5,022,654	4,612,679	4,367,165
Net Surplus / (Deficit)	3,873	(11,216)	(39,394)
Taxation			
Net Surplus / (Deficit) After Taxation	3,873	(11,216)	(39,394)



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Great South Joint Shareholders Committee 08 August 2025

Statement of financial position

As at 30 June

Assets Current Assets Cash and cash equivalents 1,180,762 1,122,852 964,991 Receivables and accruals 911,238 899,687 881,075 Prepayments 14,283 10,107 5,931 Total Current Assets 2,106,283 2,032,646 1,851,997 Non-current Assets 1,072,589 1,072,589 1,072,589 Investments 1,072,589 1,072,589 1,072,589 Deferred Tax 31,071 31,071 31,071 Property, plant and equipment 162,480 127,480 92,480 Total Non-current Assets 1,266,140 1,231,140 1,196,140 Total Assets 3,372,423 3,263,786 3,048,137 Liabilities Current Liabilities Current Lyapable - - - Payables and accruals 166,757 168,939 162,706 Income Received in Advance 426,356 331,147 158,484 Employee entitlements 292,674 299,991 307,491		2025/26	2026/27	2027/28
Current Assets Cash and cash equivalents 1,180,762 1,122,852 964,991 Receivables and accruals 911,238 899,687 881,075 Prepayments 14,283 10,107 5,931 Total Current Assets 2,106,283 2,032,646 1,851,997 Non-current Assets 1,072,589 1,072,589 1,072,589 Deferred Tax 31,071 31,071 31,071 Property, plant and equipment 162,480 127,480 92,480 Total Non-current Assets 1,266,140 1,231,140 1,196,140 Total Assets 3,372,423 3,263,786 3,048,137 Education Liabilities 160,757 168,939 162,706 Income tax payable - - - Income Received in Advance 426,356 331,147 158,484 Employee entitlements 292,674 299,991 307,491 Other current liabilities 77,533 65,829 689,643 Total Current Liabilities 963,320 865,899 689,643		Budget	Budget	Budget
Cash and cash equivalents 1,180,762 1,122,852 964,991 Receivables and accruals 911,238 899,687 881,075 Prepayments 14,283 10,107 5,931 Total Current Assets 2,106,283 2,032,646 1,851,997 Non-current Assets 1,072,589 1,072,589 1,072,589 Deferred Tax 31,071 31,071 31,071 Property, plant and equipment 162,480 127,480 92,480 Total Non-current Assets 1,266,140 1,231,140 1,196,140 Total Assets 3,372,423 3,263,786 3,048,137 Elabilities 2 2 2 2 Current Liabilities 5 5 3 162,706 Income Received in Advance 426,356 331,147 158,484 Employee entitlements 292,674 299,991 307,491 Other current liabilities 77,533 65,822 60,962 Total Current Liabilities 963,320 865,899 689,643 Net Assets	Assets			
Receivables and accruals 911,238 899,687 881,075 Prepayments 14,283 10,107 5,931 Total Current Assets 2,106,283 2,032,646 1,851,997 Non-current Assets 1,072,589 1,072,589 1,072,589 Deferred Tax 31,071 31,071 31,071 Property, plant and equipment 162,480 127,480 92,480 Total Non-current Assets 1,266,140 1,231,140 1,196,140 Total Assets 3,372,423 3,263,786 3,048,137 Liabilities Current Liabilities Payables and accruals 166,757 168,939 162,706 Income Received in Advance 426,356 331,147 158,484 Employee entitlements 292,674 299,991 307,491 Other current liabilities 77,533 65,822 60,962 Total Current Liabilities 963,320 865,899 689,643 Net Assets 2,409,104 2,397,888 2,358,494 Equity	Current Assets			
Prepayments 14,283 10,107 5,931 Total Current Assets 2,106,283 2,032,646 1,851,997 Non-current Assets Investments Investments 1,072,589 1,072,589 1,072,589 1,072,589 1,072,589 1,072,589 1,072,589 1,072,589 1,072,589 1,071 31,071<	Cash and cash equivalents	1,180,762	1,122,852	964,991
Total Current Assets 2,106,283 2,032,646 1,851,997 Non-current Assets 1,072,589 1,072,589 1,072,589 Deferred Tax 31,071 31,071 31,071 Property, plant and equipment 162,480 127,480 92,480 Total Non-current Assets 1,266,140 1,231,140 1,196,140 Total Assets 3,372,423 3,263,786 3,048,137 Liabilities Current Liabilities Payables and accruals 166,757 168,939 162,706 Income Received in Advance 426,356 331,147 158,484 Employee entitlements 292,674 299,991 307,491 Other current liabilities 77,533 65,822 60,962 Total Current Liabilities 963,320 855,899 689,643 Net Assets 2,409,104 2,397,888 2,358,494 Equity	Receivables and accruals	911,238	899,687	881,075
Non-current Assets Investments 1,072,589 1,072,589 1,072,589 Deferred Tax 31,071 31,071 31,071 Property, plant and equipment 162,480 127,480 92,480 Total Non-current Assets 1,266,140 1,231,140 1,196,140 Total Assets 3,372,423 3,263,786 3,048,137 Liabilities Current Liabilities Payables and accruals 166,757 168,939 162,706 Income tax payable - - - Income Received in Advance 426,356 331,147 158,484 Employee entitlements 292,674 299,991 307,491 Other current liabilities 77,533 65,822 60,962 Total Current Liabilities 963,320 865,899 689,643 Net Assets 2,409,104 2,397,888 2,358,494 Equity	Prepayments	14,283	10,107	5,931
Investments 1,072,589 1,072,589 1,072,589 Deferred Tax 31,071 31,071 31,071 Property, plant and equipment 162,480 127,480 92,480 Total Non-current Assets 1,266,140 1,231,140 1,196,140 Total Assets 3,372,423 3,263,786 3,048,137 Liabilities Current Liabilities Payables and accruals 166,757 168,939 162,706 Income tax payable - - - Income Received in Advance 426,356 331,147 158,484 Employee entitlements 292,674 299,991 307,491 Other current liabilities 77,533 65,822 60,962 Total Current Liabilities 963,320 865,899 689,643 Net Assets 2,409,104 2,397,888 2,358,494 Equity	Total Current Assets	2,106,283	2,032,646	1,851,997
Deferred Tax 31,071 31,071 31,071 Property, plant and equipment 162,480 127,480 92,480 Total Non-current Assets 1,266,140 1,231,140 1,196,140 Total Assets 3,372,423 3,263,786 3,048,137 Liabilities Current Liabilities Payables and accruals 166,757 168,939 162,706 Income tax payable - - - - Income Received in Advance 426,356 331,147 158,484 Employee entitlements 292,674 299,991 307,491 Other current liabilities 77,533 65,822 60,962 Total Current Liabilities 963,320 865,899 689,643 Net Assets 2,409,104 2,397,888 2,358,494 Equity	Non-current Assets			
Property, plant and equipment 162,480 127,480 92,480 Total Non-current Assets 1,266,140 1,231,140 1,196,140 Total Assets 3,372,423 3,263,786 3,048,137 Liabilities Current Liabilities Payables and accruals 166,757 168,939 162,706 Income tax payable - - - - Income Received in Advance 426,356 331,147 158,484 Employee entitlements 292,674 299,991 307,491 Other current liabilities 77,533 65,822 60,962 Total Current Liabilities 963,320 865,899 689,643 Net Assets 2,409,104 2,397,888 2,358,494	Investments	1,072,589	1,072,589	1,072,589
Total Non-current Assets 1,266,140 1,231,140 1,196,140 Total Assets 3,372,423 3,263,786 3,048,137 Liabilities Current Liabilities Payables and accruals 166,757 168,939 162,706 Income tax payable - - - Income Received in Advance 426,356 331,147 158,484 Employee entitlements 292,674 299,991 307,491 Other current liabilities 77,533 65,822 60,962 Total Current Liabilities 963,320 865,899 689,643 Net Assets 2,409,104 2,397,888 2,358,494 Equity	Deferred Tax	31,071	31,071	31,071
Total Assets 3,372,423 3,263,786 3,048,137 Liabilities Current Liabilities Payables and accruals 166,757 168,939 162,706 Income tax payable - - - Income Received in Advance 426,356 331,147 158,484 Employee entitlements 292,674 299,991 307,491 Other current liabilities 77,533 65,822 60,962 Total Current Liabilities 963,320 865,899 689,643 Total Liabilities 963,320 865,899 689,643 Net Assets 2,409,104 2,397,888 2,358,494	Property, plant and equipment	162,480	127,480	92,480
Liabilities Current Liabilities Payables and accruals 166,757 168,939 162,706 Income tax payable - - - Income Received in Advance 426,356 331,147 158,484 Employee entitlements 292,674 299,991 307,491 Other current liabilities 77,533 65,822 60,962 Total Current Liabilities 963,320 865,899 689,643 Total Liabilities 963,320 865,899 689,643 Net Assets 2,409,104 2,397,888 2,358,494 Equity	Total Non-current Assets	1,266,140	1,231,140	1,196,140
Current Liabilities Payables and accruals 166,757 168,939 162,706 Income tax payable - - - Income Received in Advance 426,356 331,147 158,484 Employee entitlements 292,674 299,991 307,491 Other current liabilities 77,533 65,822 60,962 Total Current Liabilities 963,320 865,899 689,643 Total Liabilities 963,320 865,899 689,643 Net Assets 2,409,104 2,397,888 2,358,494 Equity	Total Assets	3,372,423	3,263,786	3,048,137
Payables and accruals 166,757 168,939 162,706 Income tax payable - - - Income Received in Advance 426,356 331,147 158,484 Employee entitlements 292,674 299,991 307,491 Other current liabilities 77,533 65,822 60,962 Total Current Liabilities 963,320 865,899 689,643 Net Assets 2,409,104 2,397,888 2,358,494 Equity	Liabilities			
Income tax payable - - - Income Received in Advance 426,356 331,147 158,484 Employee entitlements 292,674 299,991 307,491 Other current liabilities 77,533 65,822 60,962 Total Current Liabilities 963,320 865,899 689,643 Total Liabilities 963,320 865,899 689,643 Net Assets 2,409,104 2,397,888 2,358,494 Equity	Current Liabilities			
Income Received in Advance 426,356 331,147 158,484 Employee entitlements 292,674 299,991 307,491 Other current liabilities 77,533 65,822 60,962 Total Current Liabilities 963,320 865,899 689,643 Total Liabilities 963,320 865,899 689,643 Net Assets 2,409,104 2,397,888 2,358,494 Equity	Payables and accruals	166,757	168,939	162,706
Employee entitlements 292,674 299,991 307,491 Other current liabilities 77,533 65,822 60,962 Total Current Liabilities 963,320 865,899 689,643 Total Liabilities 963,320 865,899 689,643 Net Assets 2,409,104 2,397,888 2,358,494 Equity	Income tax payable	-	-	-
Other current liabilities 77,533 65,822 60,962 Total Current Liabilities 963,320 865,899 689,643 Total Liabilities 963,320 865,899 689,643 Net Assets 2,409,104 2,397,888 2,358,494 Equity	Income Received in Advance	426,356	331,147	158,484
Total Current Liabilities 963,320 865,899 689,643 Total Liabilities 963,320 865,899 689,643 Net Assets 2,409,104 2,397,888 2,358,494 Equity	Employee entitlements	292,674	299,991	307,491
Total Liabilities 963,320 865,899 689,643 Net Assets 2,409,104 2,397,888 2,358,494 Equity	Other current liabilities	77,533	65,822	60,962
Net Assets 2,409,104 2,397,888 2,358,494 Equity	Total Current Liabilities	963,320	865,899	689,643
Equity	Total Liabilities	963,320	865,899	689,643
	Net Assets	2,409,104	2,397,888	2,358,494
Contributed capital 1,338,421 1,338,421 1,338,421 1,338,421	Equity			
Retained earnings 1,070,683 1,059,467 1,020,073	Equity Contributed capital	1,338,421	1,338,421	1,338,421
Total equity 2,409,104 2,397,888 2,358,494	Contributed capital			

Statement of cash flows

For the 12 months to June

	2025/26 Budget	2026/27 Budget	2027/28 Budget
Cash Flows from Operating Activities			
Receipts of Shareholder investment	3,707,709	3,780,025	3,854,873
Receipts from other operating activities	2,081,241	1,523,209	1,140,676
Income tax paid	-	-	-
Payments to employees	(3,506,664)	(3,008,394)	(2,806,006)
Payment to suppliers	(2,655,896)	(2,335,500)	(2,330,154)
Total cash flow from Operating Activities	(373,610)	(40,660)	(140,611)
Cash flow from Investing Activities			
Purchase of fixed assets and intangibles	(17,250)	(17,250)	(17,250)
Total cash flow from Investing Activities	(17,250)	(17,250)	(17,250)
Net Cash flows	(390,860)	(57,910)	(157,861)
Cash Balances			
Cash, cash equivalents and overdrafts at beginning of period	1,571,622	1,180,762	1,122,852
Cash, cash equivalents and overdrafts at end of period	1,180,762	1,122,852	964,991
Net change in cash for period	(390,860)	(57,910)	(157,861)



7.1 Attachment B

Accounting policies

REPORTING ENTITY

Southland Regional Development Agency Limited is a New Zealand registered company under the Companies Act 1993, and is deemed to be a Council Controlled Organisation under section 6 of the Local Government Act 2002.

Southland Regional Development Agency (trading as Great South) was established as Southland's regional development agency in March 2019. The registered office for Southland Regional Development Agency is 143 Spey Street, Invercargill.

Committed to driving economic, social and cultural growth, Southland Regional Development Agency has a clear mandate to leverage opportunities for Southland in the areas of economic and business development, tourism and events. This involves incorporating Southland's Regional Tourism Organisations, central government's Regional Business Partner (RBP) Network, delivering a range of events, regional initiatives, and government-funded contracts that pave the way for regional development

BASIS OF PREPARATION

The financial statements have been prepared on a going concern basis, and the accounting policies have been applied consistently throughout the year.

STATEMENT OF COMPLIANCE

The financial statements have been prepared in accordance with the requirements of the Local Government Act 2002, the Companies Act 1993, and the Financial Reporting Act 2013. This includes the requirement to comply with generally accepted accounting practice in New Zealand (NZ GAAP)

These financial statements comply with Public Benefit Entity International Public Sector Accounting Standards (PBE IPSAS) Reduced Disclosure Regime (RDR). Southland Regional Development Agency is eligible and has elected to report in accordance with Tier 2 PBE standards RDR on the basis the entity has no public accountability and has expenses > \$2m and < \$30m

PRESENTATION CURRENCY AND ROUNDING

The financial statements are presented in New Zealand dollars and all values are rounded to the nearest dollar. The functional currency of Southland Regional Development Agency is New Zealand dollars.

MEASUREMENT BASE

The financial statements have been prepared on an historical cost or fair value basis as per the following policies.

SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

The following particular accounting policies, which materially affect the measurement of the results and financial position, have been applied:

Revenue

Revenue is measured at the fair value of consideration received.

Where funding is not conditional and Southland Regional Development Agency has no obligation to deliver a specific event or service, the revenue will be recognised when receipted. Where the funding has conditions attached to it, the funding is recognised as revenue upon entitlement as conditions pertaining to eligible expenditure have been fulfilled. The funding is held as a liability until the specific conditions are met. In certain circumstances funding is not received until after the event, in which case the revenue will be accrued when it is highly probable the funding will he received.

Revenue from ticket sales is recognised upon receipt unless the terms and conditions for the ticket state that Southland Regional Development Agency is required to repay the customer if the event does not take place. Where the terms and conditions contain a refund clause, the revenue will be recognised upon completion of the event.

Revenue from the rendering of services is recognised by reference to the stage of completion at the balance sheet date, based on the actual service provided.

Products held for sale are recognised when a product is sold to the customer. Sales are usually in cash or by credit card. The recorded revenue is the gross amount of the sale, including credit card fees payable for the transaction. Such fees are included in other expenses.

Southland Regional Development Agency acts as an agent for third parties for some transactions. When incurring expenditure as an agent, this is accounted for via the Statement of Financial Position, and not as revenue and expenditure on the Statement of Comprehensive Revenue and Expense. Any revenue component within these transactions will be treated accordingly.

Interest revenue is recognised using the effective interest method.

Volunteer services received are not recognised as revenue or expenditure as Southland Regional Development Agency is unable to reliably measure the fair value of the services received.

Revenue in Advance

Revenue in advance is recognised where amounts received are in excess of the amounts recognised as revenue.

Expenditure

All expenditure is recognised as incurred unless the liability is known and can be reasonably estimated, in which case the expenditure is accrued.

Foreign Exchange Transactions

Foreign currency transactions are translated into NZ\$ (the functional currency) using the spot exchange rates at the dates of the transactions. Foreign exchange gains and losses resulting from the settlement of such transactions and from the translation at year-end exchange rates of monetary assets and liabilities denominated in foreign currencies are recognised in the surplus or deficit.

Goods and Services Tax (GST)

All items in the financial statements are stated exclusive of GST, except for receivables and payables, which are stated on a GST-inclusive basis. Where GST is not recoverable as input tax, then it is recognised as part of the related asset or expense

The net amount of GST recoverable from, or payable to, the Inland Revenue Department (IRD) is included as part of receivables or payables in the Statement of Financial Position. The net GST paid to or received from the IRD, including the GST relating to investing and financing activities, is classified as an operating cash flow in the Statement of Cash Flows.

Income Tax

Income tax expense in relation to the profit or loss for the period comprises current tax and deferred tax.

Current tax is the amount of income tax payable based on the taxable profit for the current year, plus any adjustments to income tax payable in respect of prior years. Current tax is calculated using rates that have been enacted or substantively enacted by balance date.

Deferred tax is not recognised if the temporary difference arises from the initial recognition of goodwill or from the initial recognition of an asset and liability in a transaction that is not a business combination, and at the time of the transaction, affects neither accounting profit nor taxable profit. Deferred tax is calculated at the tax rates that are expected to apply in the period when the liability is settled or the asset is realised, using tax rates that have been enacted or substantively enacted by balance date.

Current tax and deferred tax is charged or credited to the Statement of Comprehensive Revenue and Expense, except when it relates to items charged or credited directly to equity, in which case the tax is dealt with in equity.

Equit

Equity is the shareholders interest in Southland Regional Development Agency, as measured by total assets less total liabilities.

Cash and Cash Equivalents

Cash and cash equivalents includes cash in hand, deposits held at call with banks, other short-term highly liquid investments with original maturities of three months or less.

Trade and Other Receivables

Trade and other receivables are initially measured at fair value and subsequently measured at cost, amortised where necessary, using the effective interest method, less any provision for impairment.

A receivable is considered impaired when there is evidence that Southland Regional Development Agency will not be able to collect the amount due. The amount of the impairment is the difference between the carrying amount of the receivable and the present value of the amounts expected to be collected.

Property, Plant and Equipment

Property, plant, and equipment consists of the following asset classes: buildings, furniture and fittings, IT equipment, ILT Kidzone equipment, vehicles, and land. All asset classes are measured at cost, less accumulated depreciation and impairment losses. Individual assets are capitalised if they meet the definition of an asset and the cost exceeds \$1,000.

Additions

The cost of an item of property, plant and equipment is recognised as an asset if, and only if, it is probable that future economic benefits or service potential associated with the item will flow to Southland Regional Development Agency and the cost of the item can be measured reliably.

In most instances, an item of property, plant and equipment is recognised at its cost. Where an asset is acquired at no cost, or for a nominal cost, it is recognised at fair value when control over the asset is obtained. Work in progress is recognised at cost less impairment and is not depreciated.

Disposals

Gains and losses on disposals are determined by comparing the proceeds with the carrying amount of the asset. Gains and losses on disposals are included in the Statement of Comprehensive Revenue and Expense.

Subsequent Cos

Costs incurred subsequent to initial acquisition are capitalised only when it is probable that future economic benefits or service potential associated with the item will flow to Southland Regional Development Agency and the cost of the item can be measured reliably.

The costs of day-to-day servicing of property, plant, and equipment are recognised in the surplus or deficit as they are incurred.

Depreciation

Depreciation is provided on a straight-line basis on all property, plant and equipment at rates that will write off the cost of the assets to their estimated residual values over their useful lives. The useful lives and associated depreciation rates of major classes of assets have been estimated as follows:

Buildings:	3% - 7%	14.3 - 33.3 year
Furniture & Fittings:	6% - 33%	3 - 16.7 years
IT Equipment:	17.5% - 67%	1.5 - 5.7 years
ILT Kidzone:	13.5% - 33%	3 - 7.5 years
Vehicles:	13.5%	7.5 years
l and:	Λ%	

The residual value and useful life of an asset is reviewed, and adjusted if applicable, at each financial year end. An annual review for impairment is also undertaken on all assets and any impairment loss is recognised in the Statement of Comprehensive Revenue and Expense.

Impairment of Property, Plant and Equipment

Property, plant and equipment held that have a finite useful life are reviewed for impairment whenever events or changes in circumstances indicate that the carrying amount may not be recoverable.

An impairment loss is recognised for the amount by which the asset's carrying amount exceeds its recoverable service amount. The recoverable service amount is the higher of an asset's fair value less costs to sell and value in use. If an asset's carrying amount exceeds its recoverable service amount, the asset is regarded as impaired and the carrying amount is written down to the recoverable service amount. The total impairment loss is recognised in the surplus or deficit.

The reversal of an impairment loss is recognised in the surplus or deficit.

Value in Use For Non-Cash Generating Assets

Value in use is the present value of the asset's remaining service potential. Value in use is determined using an approach based on either a depreciated replacement cost approach, restoration cost approach, or a service units approach. The most appropriate approach used to measure value in use depends on the nature of the impairment and availability of information.

Value in Use For Cash Generating Assets

Southland Regional Development Agency does not hold any cash generating assets.

Intangible Assets

Goodwill

Goodwill on acquisition of businesses and subsidiaries is included in "intangible assets". Goodwill on acquisition of an associate is included in "investment in other entities" and impairment is considered as part of the overall investment balance.

Goodwill is allocated to cash-generating units for the purposes of impairment testing. The allocation is made to those cash-generating units or groups of cash-generating units that are expected to benefit from the business combination in which the goodwill arose.

Goodwill has been assessed to have an infinite useful life on the basis the business is ongoing. Goodwill is subject to annual impairment testing.

Impairment of Intangible Assets

Intangible assets that have an indefinite useful life, or are not yet available for use, are not subject to amortisation and are tested annually for impairment.

Joint Venture

The Company's 49% share of its associate NZ Functional Foods Limited is equity accounted for in the Companies financial statements.

A joint venture is an entity over which the Company has significant influence and that is neither a subsidiary nor an associate. The Company's investment is accounted for in the financial statements using the equity method. The investment in a joint venture is initially recognised at cost and the carrying amount in the financial statements is increased or decreased to recognise the Company's share of the surplus or deficit in the joint venture after the date of acquisition. Distributions received from a joint venture reduce the carrying amount of the investment in the financial statements.

If the share of deficits of a joint venture equals or exceeds its interest in the joint venture, the Company discontinues recognising its share of further deficits. After the Company's interest is reduced to zero, additional deficits are provided for, and a liability is recognised, only to the extent that the Company has incurred legal or constructive obligation or made payments on behalf of the joint venture. If the joint venture subsequently reports surpluses, the Company will resume recognising its share of those surpluses only after its share of the surpluses equals the share of deficits not recognised.

Leases

Operating Leases

An operating lease is a lease that does not transfer substantially all the risks and benefits incidental to ownership of an asset. Payments under these leases are recognised as expenses in the Statement of Comprehensive Revenue and Expense in periods in which they are incurred. Lease incentives received are recognised.

Finance Leases

A finance lease transfers to the lessee substantially all the risks and rewards incidental to ownership of an asset, whether or not title is eventually transferred. At the start of the lease term, finance leases are recognised as assets and liabilities in the Statement of Financial Position

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at the lower of the fair value of the leased item and the present value of the minimum lease payments.

The finance charge is charged to the surplus or deficit over the lease period so as to produce a constant periodic rate of interest on the remaining balance of the liability. The amount recognised as an asset is depreciated over its useful life. If there is no reasonable certainty as to whether the Company will obtain ownership at the end of the lease term, the asset is fully depreciated over the shorter of the lease term and its useful life.

Pavables

Short-term payables are recorded at their fair value.

Financial Instruments

Southland Regional Development Agency is party to financial instruments as part of its normal operation. These financial instruments give rise to financial assets and liabilities and include cash and on-call deposits, accounts receivable, investments, and accounts payable, deposits held, other financial liabilities and financial guarantees. They also include equity interests in other entities.

All financial instruments are recognised in the Statement of Financial Position on the basis of Southland Regional Development Agency Limited's general and, where applicable, particular accounting policies. All financial instruments disclosed in the Statement of Financial Position are recorded at fair value or amortised cost. Revenue and expenditure arising from these financial instruments is recognised in the Statement of Comprehensive Revenue and Expense.

Statement of Cash Flows

Cash includes cash and cash equivalents as defined above

Operating activities include cash received from all revenue sources of Southland Regional Development Agency and cash payments made for the supply of goods and services. Investing activities are those activities relating to the acquisition and disposal of non-current assets. Financing activities comprise the change in equity and debt capital structure of Southland Regional Development Agency.

Personnel Costs

Salaries and Wages

Salaries and wages are recognised as an expense as employees provide services.

Defined Contribution Superannuation Schemes

Employer contributions to KiwiSaver, the Government Superannuation

Fund, and the State Sector Retirement Savings Scheme are accounted for as defined contribution superannuation schemes and are expensed in the surplus or deficit as incurred.

Employee Entitlements

Employee benefits expected to be settled within 12 months after the end of the period in which the employee renders the related service are measured based on accrued entitlements at current rates of pay. These include salaries and wages accrued up to balance date, annual leave earned to, but not yet taken at balance date. No liability is recognised for sick leave

A liability and an expense are recognised for bonuses where Southland Regional Development Agency has a contractual obligation or where there is a past practice that has created a constructive obligation and a reliable estimate of the obligation can be made.

Changes in Accounting Policies

There have been no changes in accounting policies during the financial year.

CRITICAL ACCOUNTING ESTIMATES AND ASSUMPTIONS

In preparing these financial statements, Southland Regional Development Agency has made estimates and assumptions concerning the future. These estimates and assumptions may differ from the subsequent actual results. Estimates and assumptions are continually evaluated and are based on historical experience and other factors, including expectations or future events that are believed to be reasonable under the circumstances. The estimates and assumptions that have a significant risk of causing a material adjustment to the carrying amounts of assets and liabilities recognised in the financial statements are described in the notes to the financial statements.

Shareholder requirements

STATEMENT OF INTENT

By 1 December each year Great South will deliver a draft Statement of Intent to the joint shareholders as required by the Local Government Act. The Joint Shareholders will provide feedback to the Great South Board by 1 March each year, and the final document will be delivered by 30 June each year.

REPORTING

Half Yearly Reporting

By the end of February each year the board must deliver to the shareholders a report on the organisation's operations during that half year. The report must include the information required to be included by the LGA 2002 and the Statement of Intent and any other information requested by the shareholders.

Annual Report

By the end of September each year, the board must deliver to the shareholders and make available to the public a report on the company's operations during the year. This will include audited financial statements and the performance targets and other measures by which performance was judged in relation to the organisation's objectives.

SHAREHOLDER MEETINGS

An annual general meeting will be held before the end of September each year to present the annual report. The notice of the Annual General Meeting (AGM) will be no less than 10 working days before the meeting, unless agreed by all shareholders who are entitled to attend and vote at the meeting.

SHAREHOLDER APPROVAL

Any subscription, purchase or acquisition by Great South of shares in a company or organisation require shareholder approval by special resolution as will the other matters outlined in Great South's constitution.

DIVIDEND POLICY

The Great South Board is not authorised to approve any dividends

COMPENSATION FROM LOCAL AUTHORITIES

The Directors do not envisage any circumstances arising that would give rise to any claim from any local authority during the year other than those already stated in the financial statements.

NO SURPRISES

Great South, through the Joint Shareholders Committee will work with the shareholders to develop trust and a common understanding on a "no surprises" basis. The board will be sensitive to the demands for accountability placed on the Councils from their respective ratepayers.

PUBLIC EXPECTATIONS

Great South is very mindful of the public scrutiny that comes with being a CCO. Great South will:

- Build accountability and constructive working practices between their organisation and the shareholders.
- Commit to transparency and accountability to the public. This includes fulfilling the planning, reporting and disclosure requirements of the Local Government Act 2002 as it applies to CCOs, and the requirements of the Local Government Official Information and Meetings Act 1987 as it applies to CCOs.
- Ensure the organisation is fiscally disciplined with expenditure.
- Embrace the Shareholder Councils' strategic priorities as set out in their Long-term Plans 2018-2028 and any other relevant documents.

Great South is tasked with leading the future growth aspirations of Murihiku Southland on behalf of our shareholders, stakeholders and the wider Murihiku Southland community.

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Great South update

Record no: R/25/8/36769

Author: Michal Gray, Democracy advisor

Approved by: Robyn Rout, Governance legal manager

☐ Decision ☐ Recommendation ☐ Information

Chami Abeysinghe, Chief Executive of Great South, provides the Great South Joint Committee the 'Great South Report' contained in Attachment A. A 'Views on Tourism' report is also Shareholders included as Attachment B.

Recommendation

That the Great South Joint Shareholders Committee:

receives the report titled "Great South update".

Attachments

A Great South Report 4 1

B Views on Tourism report 4 1

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To The Joint Shareholder Committee

Date 01 August 2025

Great South Report

Author Chami Abeysinghe, Chief Executive

General Overview

It has been a couple of months since our last meeting in June, and I am happy to report that we have had a successful end to the 2024/25 financial year. The last few weeks have been busy on all accounts with significant projects being completed, stakeholder engagements being undertaken and a successful Southland Party that was accompanied by meetings with Ministers, advisors and government agencies.

Some of the key highlights since the last JSC meeting:

Ministerial engagements

Between 25/26 June, I took part in the Economic Development leaders Hui in Wellington which had Hon Nicola Willis and Hon Simon Watts present to the group. Minister Willis spoke to the Going for Growth plan that identified five (5) pathways to reduce red tape for business. These include:

- Developing talent
- Competitive business settings
- Promoting global trade and investment
- Innovation, technology and science
- Infrastructure for growth.

The minister mentioned that this plan will be refreshed as the business environments change.

Minister Watts spoke about Economic Development as a fundamental part of government and that Territorial Authorities should be concentrating on delivering core services. The minister spoke about regional deals that will likely be a 10year mechanism to support regional growth. Rates capping is being written into policy now and is likely to be implemented by 01 July 2026. He also spoke about publishing performance rankings of councils as well.

We also had a presentation from Simon Ansley, Invest NZ, which was relevant to us as a region. Invest NZ is being set-up as a standalone investment attraction agency. NZ's ability to attract foreign direct investment (FDI) falls far short of similar economies. It was identified that NZ FDI stock sits at around 38% of GDP vs Ireland which is at 250% of GDP. Last year NZ's FDI stock grew by 5% while Singapore's stock grew by 31%.

Simon advised that the NZTE Investment operating model was to originate, prepare and connect investment opportunities to investors that accelerate the growth of New Zealand, supporting a high wage, low emission economy. Investments are being sought for are in the following categories.

- Renewables
- Clean Tech
- Aquaculture and
- Advanced Transportation and Aerospace



Southland Regional Development Agency

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greatsouth.nz

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Ministerial Visits - 24/25 July 2025

Lining up with the Southland Party on Friday 25 July 2025, I organised a range of meetings with ministers, ministerial advisors and government agencies. Mayor Rob Scott accompanied the Great South contingent for these meetings, as the Chair of the Joint Shareholders. We were lucky to have John Yaldwyn, Chair of the SpaceOps Board accompany us for the meeting with Minster Chris Penk.

Hon Mark Patterson

Those present: Hon Mark Patterson, Ian, Chami, Sammy, Jaap.

Discussion

- Update provided to the minister on the Murihiku Southland Aquaculture Pathway. Minister Patterson was interested to understand the potential of growing the industry to \$1B by 2040 and to \$3B by 2045, if all the private investments were made. We also spoke about the potential for a plant based aquafeed plant to support this industry, potentially to be placed at the Awarua quadrant.
- We spoke about the updated information around our Energy Strategy and that separate work on solar, wind and run of river hydro was being completed
- We advised the Minister of our next pieces of work including agriculture with a focus on AgriTech, exports and the integrated road transport work we need to undertake with these opportunities.
- I provided the minister with an update around the forestry and land use change work Steve has completed and the opportunities that are becoming available for a woody biomass industry in Southland and the feasibility we need to undertake for biogenic methane to replace LPG. The minister kindly reminded us that the Waste Minimisation Fund may assist us with funding to undertake this feasibility work.
- The minister also questioned the availability of water to support new industry, and we briefly spoke about ICC's RIF application for water which I mentioned had been pulled. The Minister advised us that there is a separate allocation for infrastructure for industrial needs and he would encourage ICC to resubmit their application after updating this to fall in line with the needs of new industry, which he believed would have a much better chance at being successful.
- We also briefly touched on the minister's visit to Southland on 04 August.

o Hon James Meager

Those present: Hon James Meager, Hon Joseph Mooney, Ian, Chami, Mayor Rob Scott, Cristina Aftene (Private Secretary)

Discussion:

- This meeting was a follow-up to the meeting we had in our office when the minister visited Southland. I provided a brief update on Great South, Beyond 2025 and the work we are progressing from Southland's long-term plan including Aquaculture.
- We spoke about our ambitions to support the governments 'Going for Growth' and 'Doubling Exports' plans. We identified that with Beyond 2025, we know what we need to do, and how to get there.
- We touched briefly on our enablers including housing, energy, workforce and data (DISH) and roading & transport.
- With MP Joseph Mooney in the room, he prompted us to update the minister about Space Operations and the potential for growth with this business.

Hon Todd McClay

Those present: Hon Todd McClay, Mayor Rob Scott, Ian, Chami, Bobbi, Olivia Sullivan and Jane Chirnside from MPI and Ben, Dimitri (NZTE), and Megan from the minister's our office

Southland Regional Development Agency

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Discussion:

- This was the first time Great South was able to get in front of Hon Todd McClay and I started with an introduction on who we are and what we do.
- Bobbi updated the minister about the Aquaculture Plan and our potential to support the national strategy to grow to over \$3Billion in 10 years.
- We spoke about forestry and land use change and the opportunities for renewable energy, develop a woody biomass industry in the region and for value added forestry processing. We identified that we had completed calculations for the regional emissions report which was waiting on the forestry data from MPI. The MPI team confirmed that this information would be available in August 2025.
- Referring back to Beyond 2025, we identified that agriculture is the foundation upon which our economy was built on and we would be undertaking work to look at how we could strengthen this industry, especially with the support of AgriTech.
- Hearing about the various opportunities that were available to Southland, the minister suggested we produce an investment proposition for Southland that NZTE could use.
- The Minister had to leave with his press secretary, however we remained in his office and had in-depth discussions with his remaining officials, NZTE and MPI. We spoke in greater detail about investments, bio security, the Aquaculture plan.

Jenny Marcroft - Under Secretary to Hon Shane Jones

Those present: Jenny Marcroft, Mayor Rob Scott, Ian, Chami, Bobbi, Elizabeth Malama **Discussion:**

- The discussion with Jenny was focussed primarily on Aquaculture and Bobbi took Jenny and her team through the draft Murihiku Southland Aquaculture Pathway that has been drafted.
- We spoke about Great South and the work we do, and how we are at the parliament offices advocating for the region.
- Bobbi touched on the use of 1080 for the Predator Free Rakiura project and the possible impacts on fisheries in and around the island.
- We acknowledged Hon Shane Jones and the support he provides to Southland. We also acknowledged with gratitude the minister's support of Ocean Beach and other projects under RIF.

o Hon Andrew Hoggard

Those present: Hon Andrew Hoggard, Mayor Rob Scott, Cameron McIntosh, Ian, Chami, Bobbi, Ben (from the minister's office)

Discussion:

- As this was the first time we met Hon Andrew Hoggard, I started off with an introduction to Great South and the purpose of our meeting, which was to provide a general update on Great South, aguaculture and bio security around this pathway.
- Bobbi took the minister through the Aquaculture pathway plan and spoke to the bio security
 measures that were concerning the industry. Bobbi also spoke about the Rakiura Predator
 Free project and the concerns from the island around measures to make Rakiura free of
 predators, and unintended consequences around the use of various options to control pests
 on the island.
- The minister is a farmer himself and the importance of farming in Southland was also discussed, leading him to mention CH4 and the difficulty the ministry was having with them. He mentioned that CH4 have been extremely difficult to work with, and they just don't want to supply any evidence of their trials, and they just don't want to fill in any forms. The minister

Southland Regional Development Agency

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is responsible for food safety therefore, this is a laser focus for him, and he will not compromise on this focus.

o Hon Chris Penk

Those present: Hon Chris Penk, Mayor Rob Scott, John Yaldwyn, Ian, Chami, Dan White (from the minister's office) and Michael Appleyard from LINZ

Discussion:

- After introductions, John provided a comprehensive update to Minister Penk around Space Ops, the business model, the opportunity for growth and the special projects that have come online since taking over Warkworth.
- John thanked the minister and Michael from LINZ (endorsed and supported by Ian) for being our anchor tenant at Awarua and reiterated how the partnership we have with them is extremely valued. This acknowledgement was gratefully accepted and acknowledged by both Hon Chris Penk and Michael.
- lan provided the minister with an update on Great South and the importance of our partnership with rūnaka.
- Since the Minister had to leave to catch a flight to Auckland, I was unable to provide him with an update about the business sentiment in Southland.

Those present: Kate Morris (MPI), Chami and Bobbi

Discussion:

- This was a breakfast meeting to thank Kate and show our gratitude for the support, guidance and assistance they provided to Bobbi when writing the aquaculture pathway plan.
- The discussion included a review of how the Southland plan aligned to the national aquaculture strategy. There was a discussion about the challenges including bio security and the activities around making Rakiura predator free.
- Kate congratulated Bobbi on the plan as this was the first time in New Zealand that a region proactively released a pathway for aquaculture. She was very excited at the prospect of our industry.

Jack Bolter & Matt Stone – Advisors to Minister Simon Watts

Those present: Jack Bolter, Matt Stone, Mayor Rob Scott, Cameron McIntosh, Ian, Chami, Bobbi Discussion:

- This discussion was to keep Minister Simon Watts' office updated about Southland's 4th Energy Strategy and our sustainability programme.
- We provided an introduction to Great South and the work we do.
- Bobbi spoke to the aquaculture pathway and further discussions were had about the opportunities and challenges including bio security.
- There was discussion about getting our products to market and Mayor Rob touched on the roading and transport needs of our region as well as the FAR rates and the disproportionate funding levels coming back to the region.
- Cameron spoke about water and highlighted some comments the minister had made at the last LGNZ conference. It was revealed that Jack Bolter was instrumental in writing 'Local Water done well'.
- We sought clarity around a National Energy Strategy which the advisors said was being developed. No date for release was given.

Southland Regional Development Agency

Lisa Futschek & Karen Olver – Seafood NZ

Those present: Lisa Futschek, Karen Olver, Chami and Bobbi

Discussion:

- This too was a meeting to thank Karen for her support and assistance for the Murihiku Southland Aquaculture Pathway.
- Lisa was the new CE, and someone I knew from my past at SIT. Lisa was at Education New Zealand when I was in international education and being able to reconnect was valuable for us.
- We extended an invitation to Karen to visit the seafood companies in Southland and agreed to host her if she made her way down to the deep south.

Cat Wilson and Pip Fox – Department of Conservation (DOC)

Those present: Cat Wilson, Pip Fox, Matt, Mayor Rob Scott, Chami, Mark

Discussion:

- This meeting was a follow up to the workshop held in Queenstown.
- I provided an overview of Great South, the Beyond 2025 long-term plan and the work we do, highlighting the importance of Piopiotahi as an iconic tourist destination.
- We spoke about concessions and the inadvertent effects of the decisions DOC were making to get through volumes, rather than understanding businesses that the concessions were being approved for.
- This was a really disappointing meeting with the DOC team being non-committal and not wanting to engage with us or resolving the problems around concessions.

Aquaculture

While we had a draft Aquaculture plan ready on 30 June, as per our SOI commitments, we are now on the verge of signing off the final Murihiku Southland Aquaculture Pathway 2025, and I hope to have copies of the pathway plan printed and available to JSC members at the meeting next week. Bobbi has successfully engaged with the existing industry, new and potential investors, local government, central government, agencies, South Port, Invercargill Airport and industry advocates to complete the pathway. Needless to say, there is significant potential to grow aquaculture to \$1B target, but a lot depends on private investment. We can however, make it simple for investments to be made in the region by ensuring the right infrastructure including water, energy, transportation, cold stores etc., are available and the consenting process is straightforward.

• Calder Stewart – Awarua Quadrant

Bobbi and I met with Ben Stewart, Huw Jones, Mark Johnston and John D'Arcy from Calder Stewart to discuss their proposal to develop the Awarua Quadrant, land that borders Space Operations property in Awarua

It was an open and frank conversation and Space Ops was spoken about as well. We declared our interest and reiterated that we would like to work with Calder Stewart to find an amicable solution to the interference their proposed wind turbines are likely to have on the antennas at the satellite ground station. We informed Calder Stewart that there are major international customers that were being serviced from this site, and we also raised the importance of Space Ops within New Zealand's space industry.

We also spoke about aquaculture processing, the need for cold stores, the need for processing facilities and value add services as well as the potential to develop plant-based protein aquafeed at the Awarua Quadrant.

• Update on Milford Opportunities

Southland Regional Development Agency

Mark and I attended a MOP workshop held in Queenstown in mid-July. The workshop was hosted by Penny Nelson, Director General of DOC. Michael Skerrett (Ex-MOP board member) provided an overview of the work done to date which was then followed by a presentation by Jenn Bestwick (Ex-MOP board chair). Jenn outlined how the project morphed into a 462 page 'Better Business Case' that was presented to central government in June 2024.



Catherine Wilson, Director Heritage & Visitors then went on to explain what government had decided to progress from the MOP business case including:

- Investment in new and improved visitor experiences
- Ngāi Tahu's cultural footprint and interests
- Collaboration on hazards and congestion solutions
- Spatial planning
- Revenue and investment opportunities
- New management tools such as a 'Special Amenities Area'
- Managing concessions differently and providing greater certainty where possible

The workshop then went on to outline a 12-24-month transitional governance proposal to guide delivery of some quick and immediate wins for Milford. The governance group will be supported by Project Steering Committees and an Advisory Group. Expressions of Interest have now been called for we will push for Great South representation. I also offered the services of Great South for community engagement and building a comprehensive communications plan. Early in the workshop, feedback from the group identified that Piopiotahi belonged to Southland (not Queenstown) and therefore the Southland community should be engaged and taken on the journey.

Given the importance of Piopiotahi to Southland's tourism industry, I have included a link to the 'Better Business Case' which can be accessed here.

Views on Tourism Report

The Community Sentiment in Relation to Tourism research is now complete, and I have attached a copy of the report for the JSC member's reference. This is the second time we've undertaken this research, following the initial round during the development of the Murihiku Southland Destination Strategy 2023–2029. The updated findings provide valuable insights into how our communities perceive tourism and what they want to see in its future development.

Key highlights are:

 93% of residents feel they have personally benefited from tourism, with the most commonly cited benefits being employment/income opportunities and support for local businesses.

Southland Regional Development Agency

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- While overall sentiment is positive, residents also noted adverse impacts such as litter/waste, road safety concerns, and housing affordability—particularly in Fiordland, where the effects of tourism are more keenly felt.
- There is stronger support for domestic tourism across the region, with Fiordland residents showing more limited acceptance of international tourism.
- 86% of respondents support increased tourism development and visitor numbers, showing a clear understanding of tourism's value despite concerns.
- Residents identified key priorities for future tourism development:
 - Improving community infrastructure
 - Reducing environmental impacts
 - Attracting more domestic visitors
 - Encouraging visitors to explore more widely across the region

These insights align well with the Murihiku Southland Destination Strategy and will help guide our strategic direction. Understanding this sentiment enables us to reflect the aspirations of our communities while enhancing the visitor experience.

Southern Way Regional Tourism Boost Fund (RTBF)

The Southern Way group including Roz from Great South's Fiordland office attended training supported by Jet Star and around 65 trade partners in Brisbane and Coolangatta. This was a great opportunity for our team to grow capability, learning from the Destination Queenstown team who are hugely experienced operators. This was made possible by the \$350,000 from MBIE RTBF. Our hope and a request to the Minister is that these one-off funding allocations, which are always welcome, is repeated. The true value is realised when repeated over 2/3 years. This helps provide a strategic pathway to create and consolidate the market.

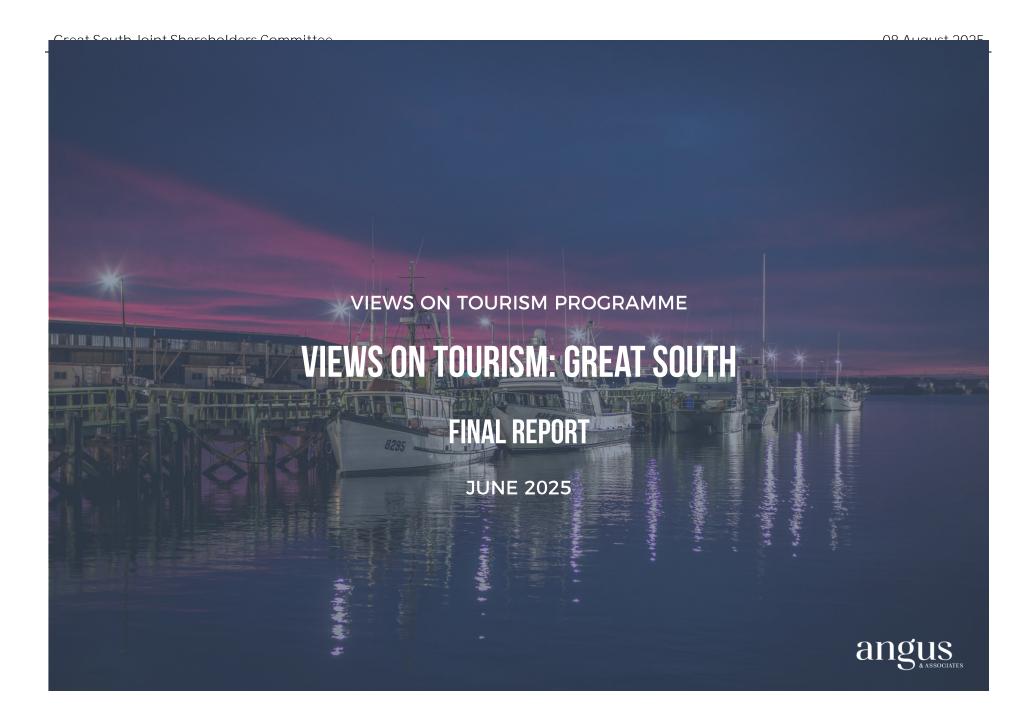
Upcoming Priorities

- 2026/26 FY Letter of Expectation
- o Planning for induction of new Councillors in February 2026
- Invitations sent to Hon Nicola Willis (to visit Southland) and Hon Louise Upston (to visit Te Anau and Fiordland)
- Develop a framework to support Environment Southland and the Territorial Authorities with spatial planning. Start a discussion about Great South facilitating this work one behalf of the region.
- Arrange stakeholder updates in Queenstown and Dunedin to share our plan and look at opportunities to collaborate
- Lobby Air NZ (in conjunction with IVC airport and the support of our shareholders) for the return of a direct IVC-WLG flight
- Seek further meetings with other key ministers and their advisors/departmental officials.

Attachments

1. Views on Tourism Report - Great South 2025 FINAL

Southland Regional Development Agency



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 <u>personally benefitted</u> 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 <u>adversely impacted</u> 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.

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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.





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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 <u>aged 18 years or more</u> 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 <u>aged 15 years or more</u>, 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.

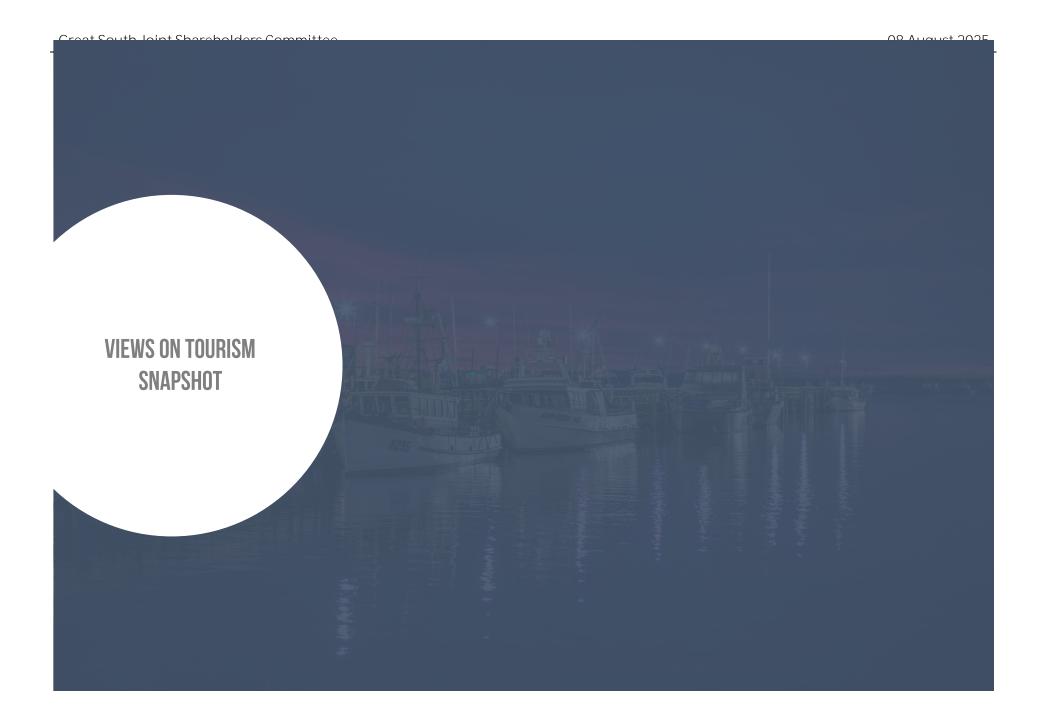
Tourism Approval Rating

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 \triangle and \bigvee 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.

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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 47

New Zealand 48

International TAR:

Murihiku Southland 48

New Zealand 48

Domestic TAR:

Murihiku Southland 64

New Zealand 58

Advocacy

Approval
Acceptance

Limited Acceptance

Threatened Acceptance

Disapproval

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

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

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

- More litter and waste generation
- 2 Feel less safe driving
- Damage to the natural environment
- Local attractions, landmarks and/or events are too expensive for me/my family to visit
- 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

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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

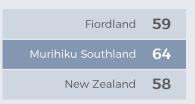
Overall TAR:

35	Fiordland
47	Murihiku Southland
48	New Zealand

International TAR:

Fiordland	34
Murihiku Southland	48
New Zealand	48

Domestic TAR:



Advocacy



Threatened Acceptance

Disapproval

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

- More local businesses opening, or being able to stay open
- Opportunities for employment/income
- A greater variety of goods and services being available than otherwise would be
- My/our community is a more vibrant and friendly place to live
- 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...

- Feel less safe driving
- More litter and waste generation
- Too much pressure on community infrastructure
- Tourism activity means that the availability of housing has decreased
- 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





Improving community



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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

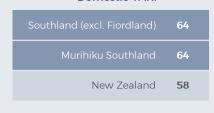
Overall TAR:

48	Southland (excl. Fiordland)	
47	Murihiku Southland	
48	New Zealand	

International TAR:

Southland (excl. Fiordland)	48
Murihiku Southland	48
New Zealand	48

Domestic TAR:







Disapproval

Threatened Acceptance

93% of the residents have experienced the <u>benefits</u> of tourism activity in their area, and the top 5 are...

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

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

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

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





Creating employment for people in my community



Attracting more domestic visitors



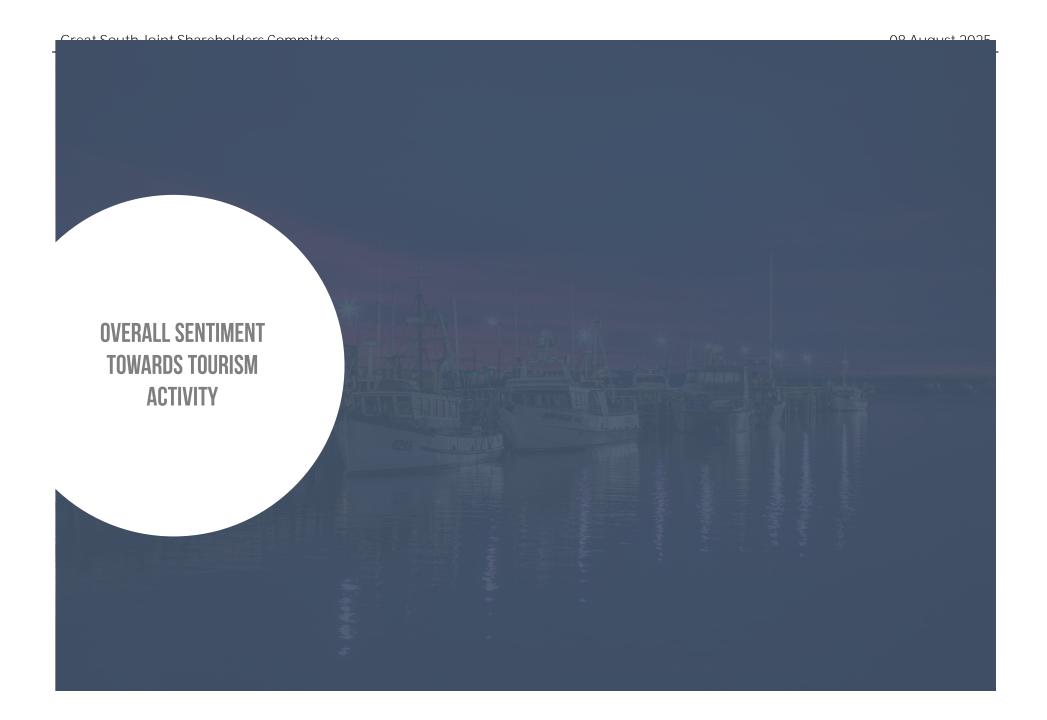
Encouraging visitors to travel more widely so that more communities benefit



Attracting higher quality visitors

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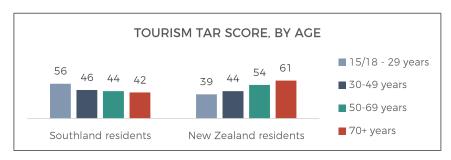
TOURISM - OVERALL

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.

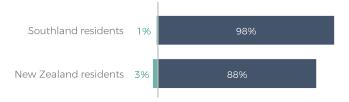


angus & associates Note: 'neither agree nor disagree' and 'don't know' responses not shown





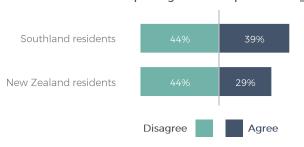
Tourism is good for my region



Visitors are putting too much pressure on New Zealand



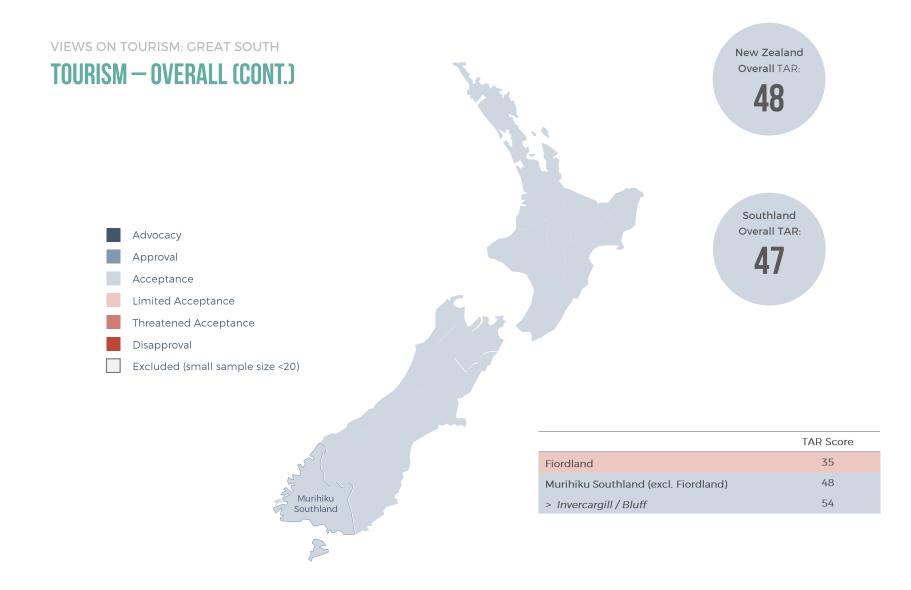
Visitors are putting too much pressure on my region



Base: Southland residents n=390: NZ Residents from A&A VoT Programme (YE Apr 25) n=3,027

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Base: Southland residents n=390; NZ Residents from A&A VoT Programme (YE Apr 25) n=3,027

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%.

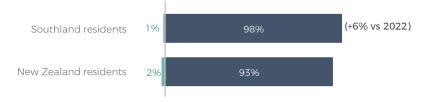
Despite this widespread acknowledgement of the benefits of international tourism, 45% of Murihiku Southland residents also feel that international visitors put too much pressure on New Zealand, and 40% believe that international visitors put too much pressure on their region. These proportions are considerably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

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

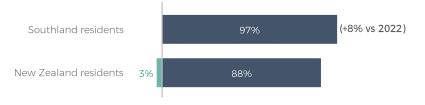


angus & associates Note: 'neither agree nor disagree' and 'don't know' responses not shown

International tourism is good for New Zealand



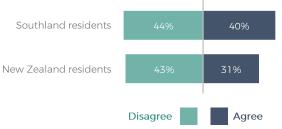
International tourism is good for my region



International visitors are putting too much pressure on New Zealand



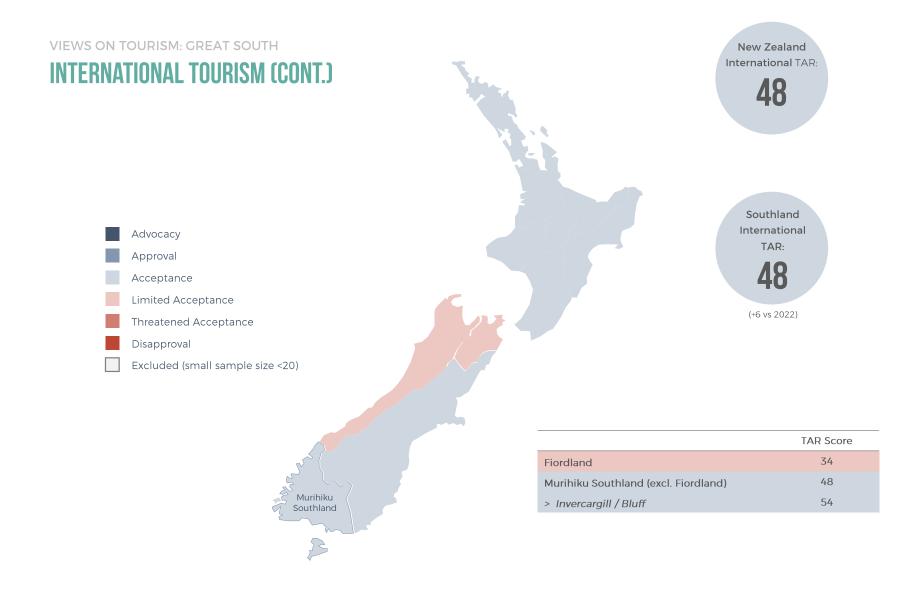
International visitors are putting too much pressure on my region



Base: Southland residents n=390: NZ Residents from A&A VoT Programme (YE Apr 25) n=3,027

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Base: Southland residents n=390; NZ Residents from A&A VoT Programme (YE Apr 25) n=3,027

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).

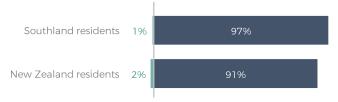
New Zealand benchmark data indicates that support for domestic tourism generally increases with age, but this is not the case amongst residents of Southland (with a very high TAR score of 76 in the 15-29 year age group).

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.

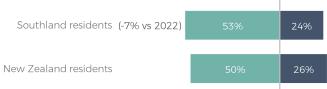
Domestic tourism is good for New Zealand

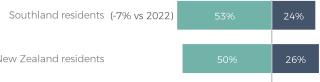


Domestic tourism is good for my region



Domestic visitors are putting too much pressure on New Zealand





Domestic visitors are putting too much pressure on my region

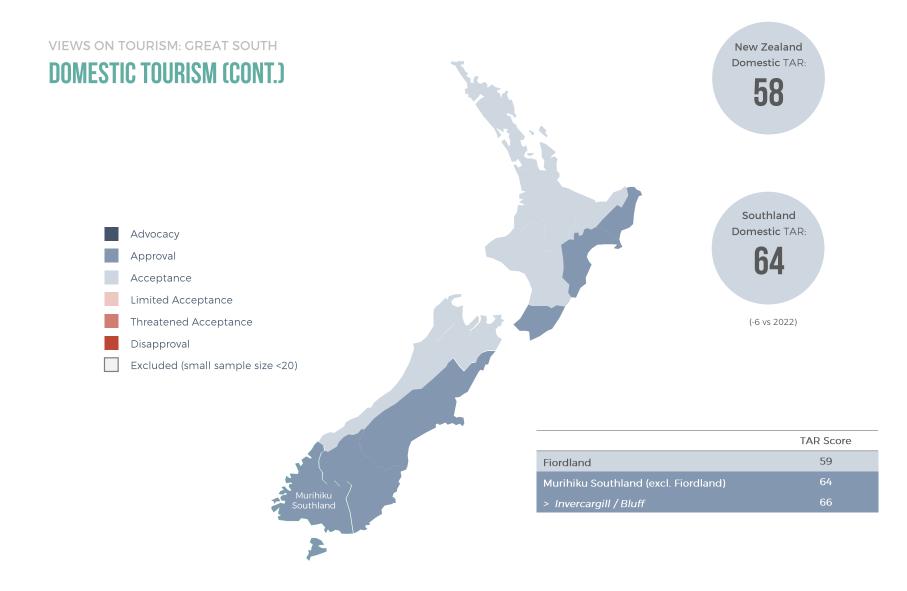




angus & associates Note: 'neither agree nor disagree' and 'don't know' responses not shown

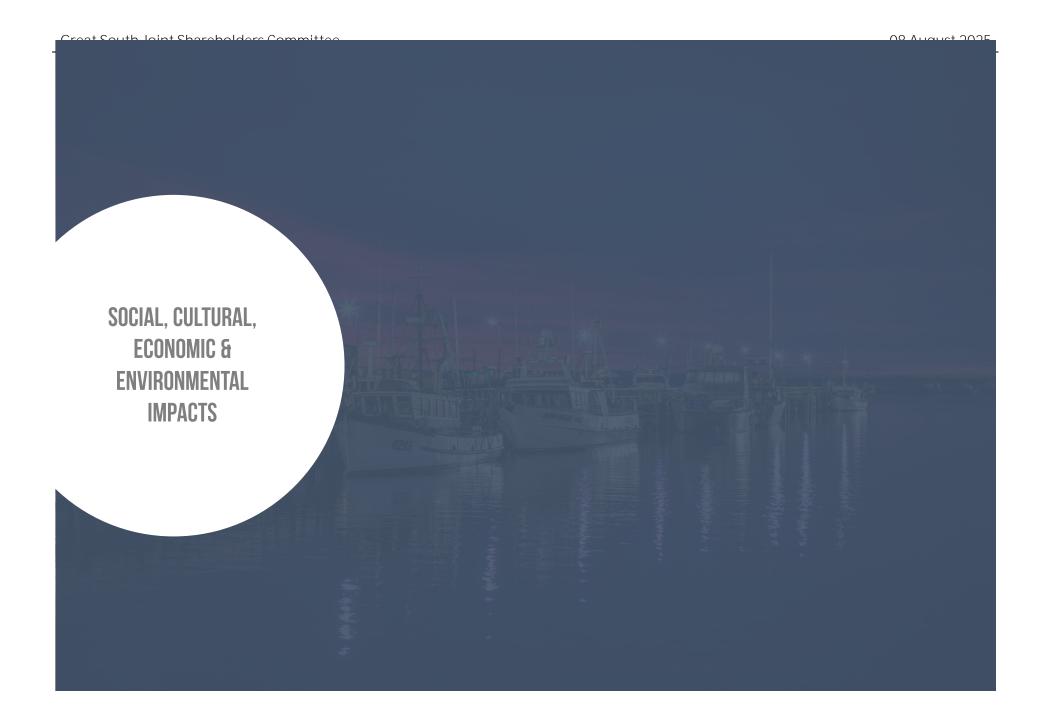
Base: Southland residents n=390: 14 NZ Residents from A&A VoT Programme (YE Apr 25) n=3,027

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Base: Southland residents n=390; NZ Residents from A&A VoT Programme (YE Apr 25) n=3,027



POSITIVE / NEGATIVE IMPACTS OF TOURISM

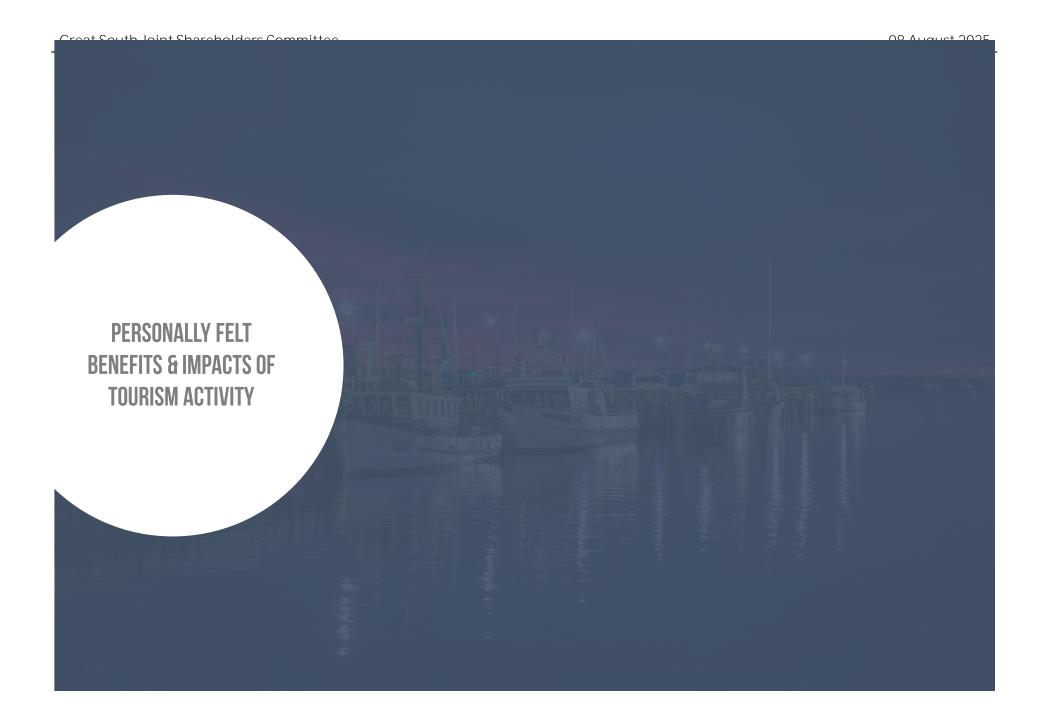
Thinking about the positive or negative impacts of tourism, what impact would you say tourism has on...?



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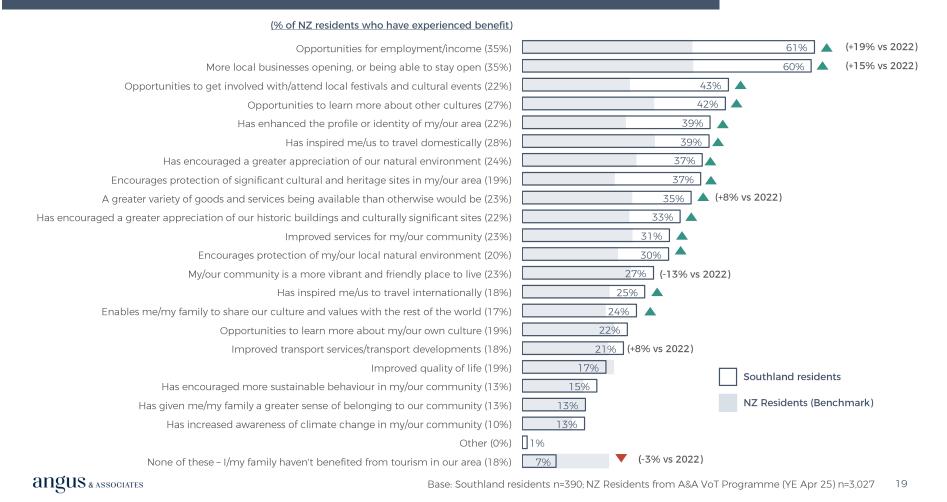
Base: Southland residents n=390 *Negative = Very negative + Negative; Positive = Very positive + Positive; 17 'Neither positive nor negative' responses are excluded

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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?



BENEFITS FROM TOURISM IN LOCAL AREA

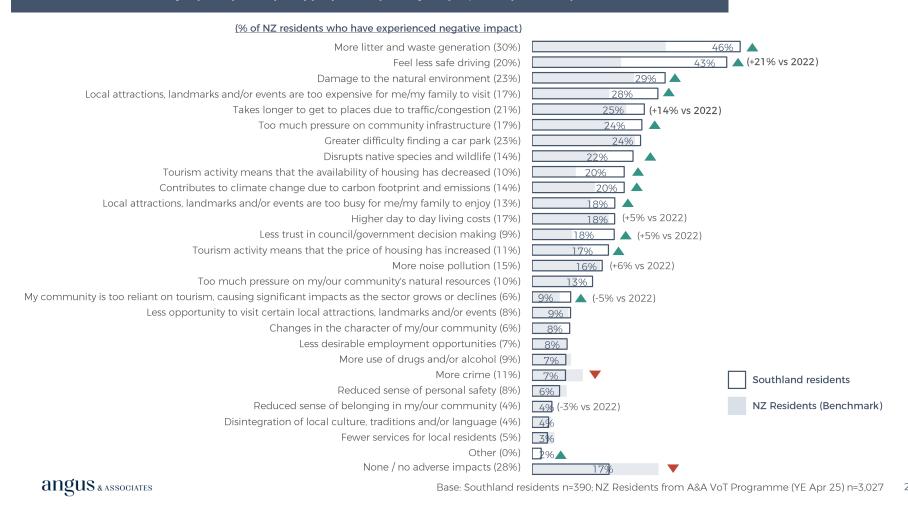
	Fiordland	Rest of Southland	Murihiku Southland (Total)	NZ (Benchmark)
Opportunities for employment/income	73%	60%	61%	35%
More local businesses opening, or being able to stay open	78%	59%	60%	35%
Opportunities to get involved with/attend local festivals and cultural events	26%	44%	43%	22%
Opportunities 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

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Blue text highlights results which are significantly higher than the Murihiku Southland total; red text highlights results that are significantly lower. 20

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?



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

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Blue text highlights results which are significantly higher than the Murihiku Southland total; red text highlights results that are significantly lower.

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...?

each item as a negative impact...

Negative impact (Top 15 - ranked by prevalence)

More litter and waste generation (46%)

Feel less safe driving (43%)

Damage to the natural environment (29%)

Local attractions, landmarks and/or events are too expensive for me/my family to visit (28%)

Takes longer to get to places due to traffic/congestion (25%)

Too much pressure on community infrastructure (24%)

Greater difficulty finding a car park (24%)

Disrupts native species and wildlife (22%)

Tourism activity means that the availability of housing has decreased (20%)

Contributes to climate change due to carbon footprint and emissions (20%)

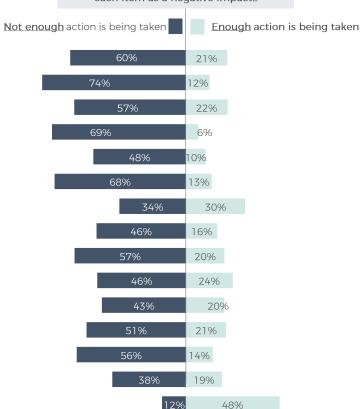
Local attractions, landmarks and/or events are too busy for me/my family to enjoy (18%)

Higher day to day living costs (18%)

Less trust in council/government decision making (18%)

Tourism activity means that the price of housing has increased (17%)

More noise pollution (16%)



Shown as a proportion of those identifying

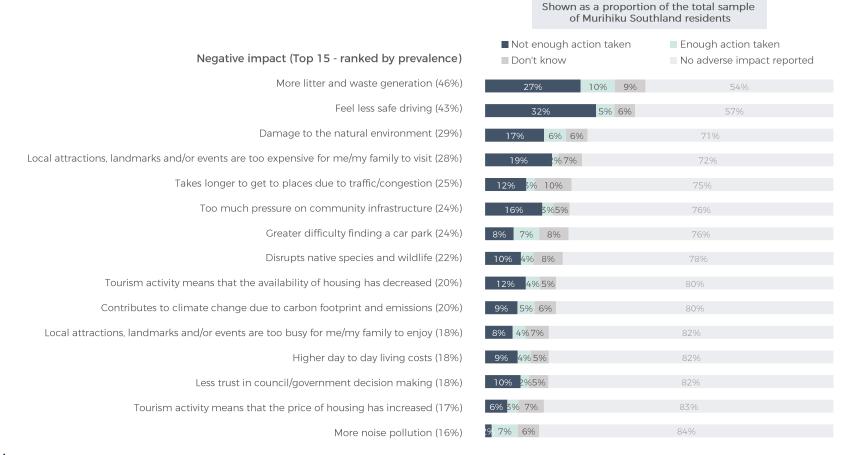
Base: Southland residents n=390 'Don't know' and no impact responses excluded

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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...?



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Base: Southland residents n=390 24

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."



Base: Southland residents negatively impacted by tourism who disagree that enough action is being taken to address these impacts

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."

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Base: Southland residents negatively impacted by tourism who disagree that enough action is being taken to address these impacts

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."

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Base: Southland residents negatively impacted by tourism who disagree that enough action is being taken to address these impacts

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."

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Base: Southland residents negatively impacted by tourism who disagree that enough action is being taken to address these impacts

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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 trolly 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."

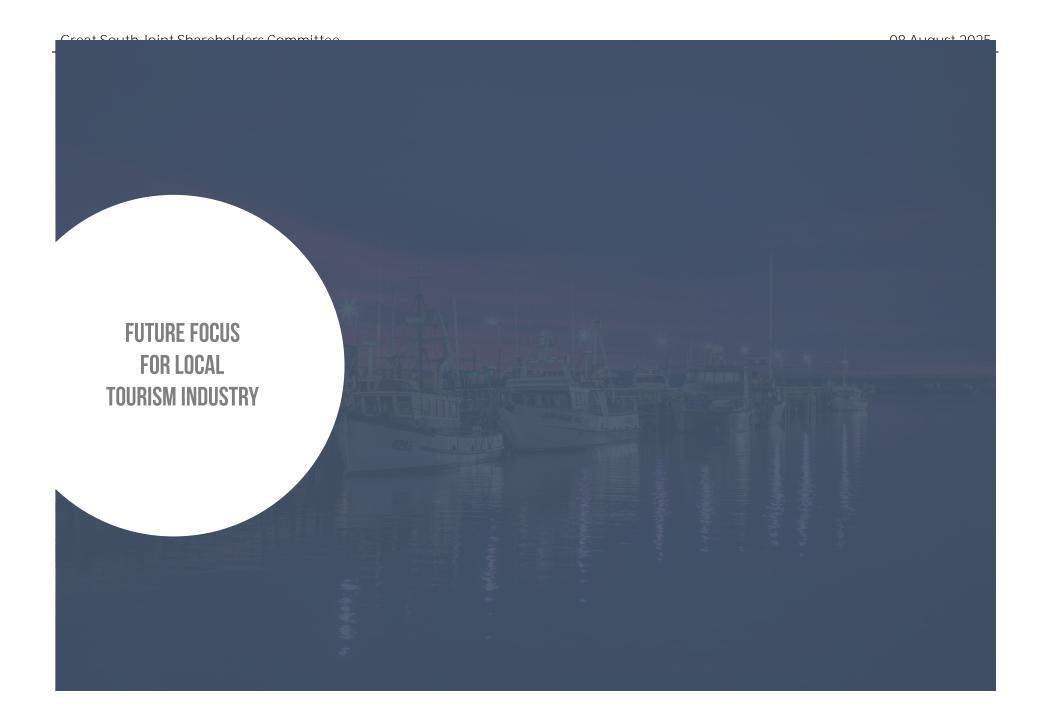
"More worker accommodation for those having to rent. Create a better system around encouraging those with rental properties to do long term rentals rather than Air BnB."

"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."

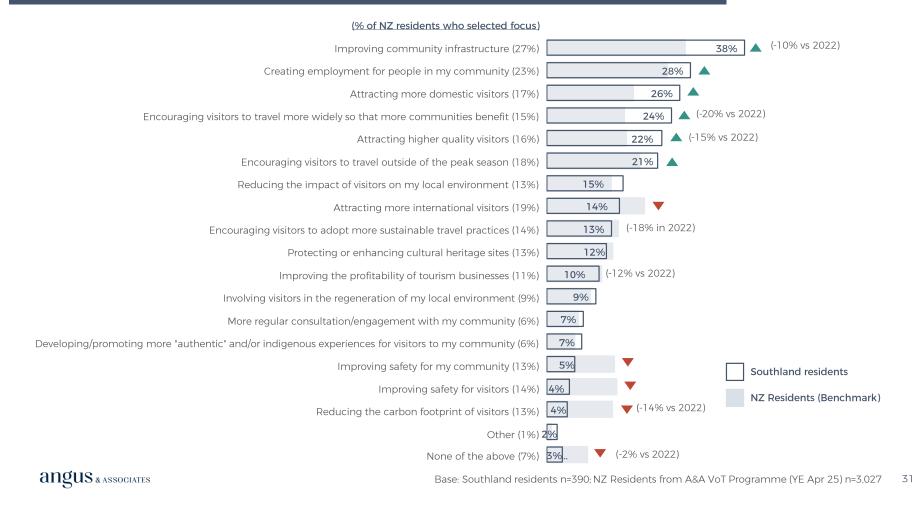
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Base: Southland residents negatively impacted by tourism who disagree that enough action is being taken to address these impacts



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)?



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

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Blue text highlights results which are significantly higher than the Murihiku Southland total; red text highlights results that are significantly lower.

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."

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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 Al 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

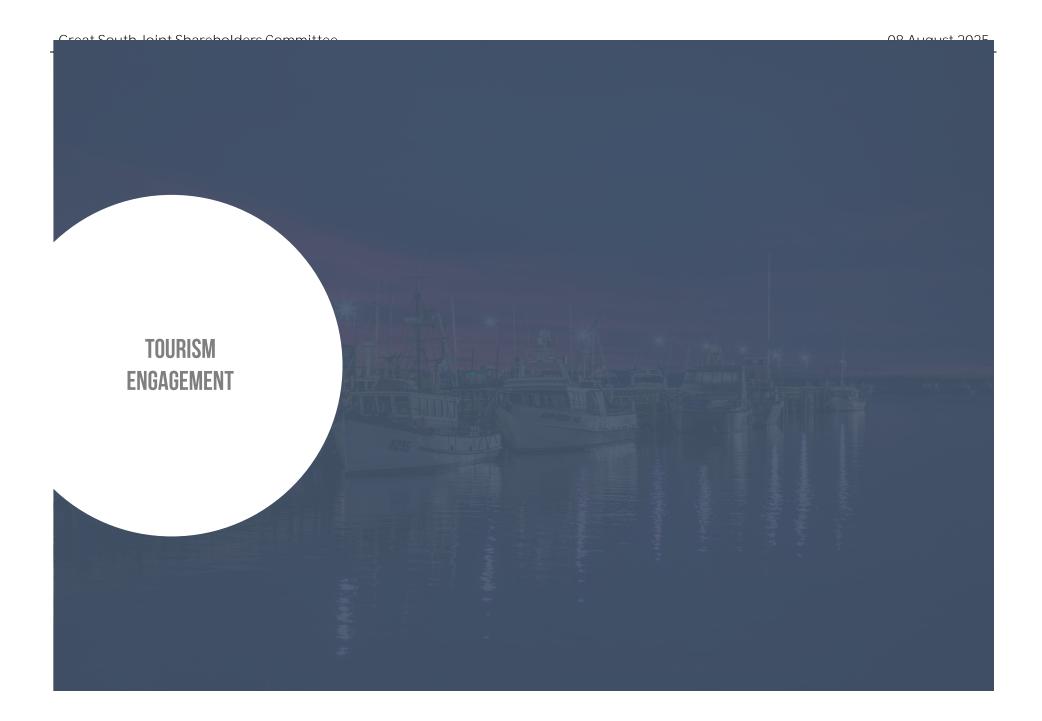
"Need to diversify income streams in Te Anau to high earning /return industries that are also good for the environment. E.g., technology."

"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."



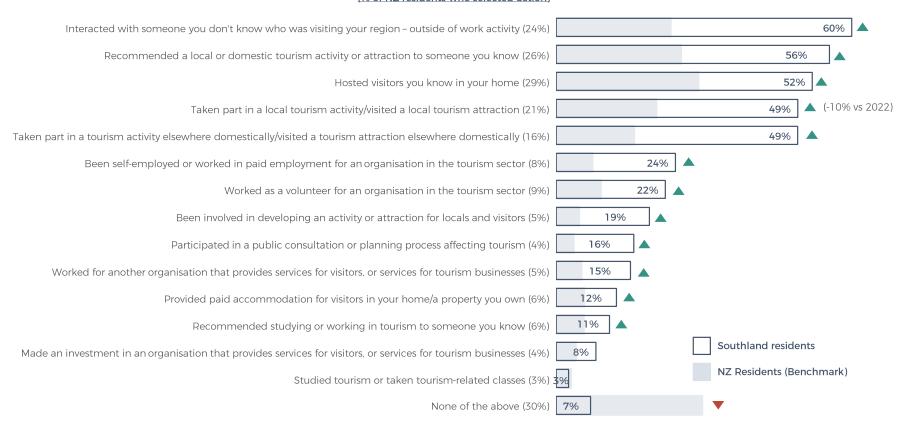
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RESIDENT ENGAGEMENT WITH TOURISM (VS. NZ BENCHMARK)

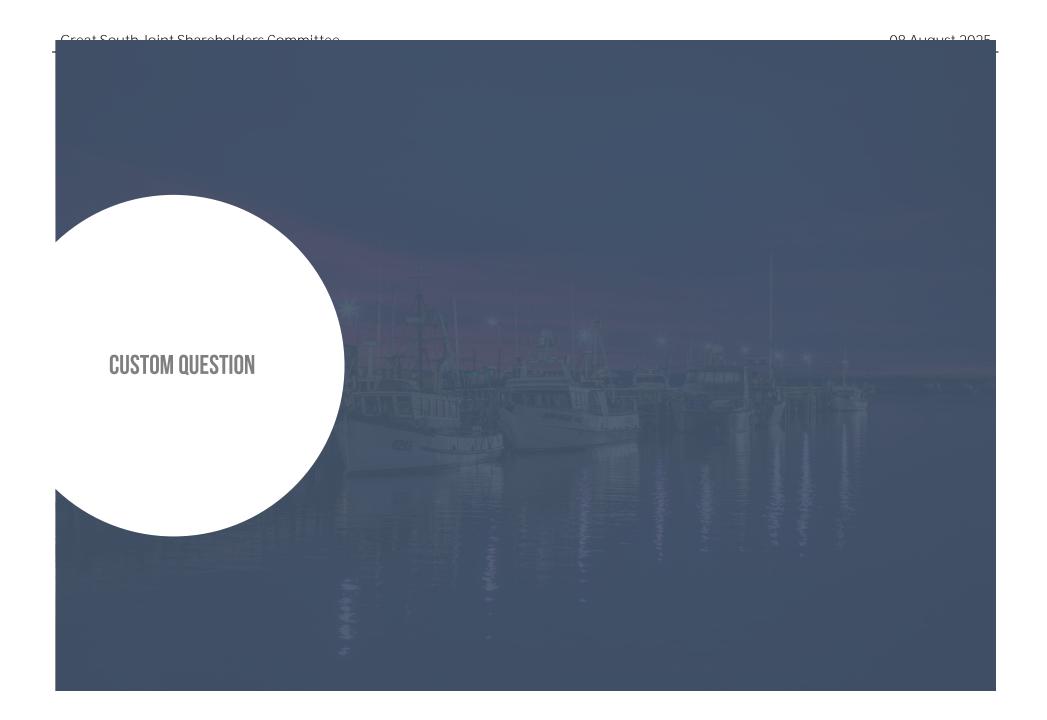
Which of the following have you personally done in the last two years (if any)?

(% of NZ residents who selected action)



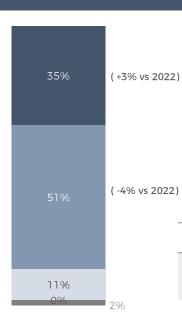
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Base: Southland residents n=390; NZ Residents from A&A VoT Programme (YE Apr 25) n=3,027



TOURISM DEVELOPMENT IN MURIHIKI SOUTHLAND

Which one of the following best describes your views on tourism development in 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
- I see the benefits that tourism brings to Murihiku Southland and would like to see well-managed growth and some increase in visitors
- I like the balance we have at the moment and would prefer that there is no increase in visitors
- I would prefer Murihiku Southland without any visitors (0%)
- Don't know

	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



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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

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*Multiple response, totals add to more than 100%

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



