Paid Car Park Pilot Price Structure

Edition 2: Dolomite Point, Franz Josef Glacier & White Horse Hill

Punangairi Visitors Centre, Dolomite Point. Source: Ngāti Waewae and Department of Conservation

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1 Overview

1.1 Paid parking project context

The Department of Conservation (DOC) is undertaking a paid parking pilot[1] at three sites in the South Island for the 2025/26 season. The purpose of this pilot is to test mechanisms for:

- visitors to contribute towards the costs of the carparking facilities and the financial sustainability of DOC's operations
- visitor demand management

This is the first time DOC will be charging for car parking. The car parks are three of the country's highest-pressure sites. The pilots aim to benefit visitor experiences at place and mitigate visitor health and safety risks on peak demand days.

The pilot will provide insight into the efficacy of paid parking as a tool to achieve DOC's financial goals and as a visitor management tool at three unique sites. DOC will be working with a private partner for the hardware and management of paid parking. The project detailed business case [DOC-7783951] includes more information on the case for introducing paid parking.

1.2 Purpose of report

The purpose of this report is to recommend an appropriate fee structure for the three car parks and to explain the rationale behind them. Whilst the approach for all three sites is consistent, each site is unique and requires a tailored recommendation. The three car parks (refer Figure 1, page 3) are:

- White Horse Hill Car Park/ WHH (Aoraki National Park)
- Dolomite Point Car Parks/ DP (Paparoa National Park)
- Franz Josef Glacier Car Park/ FJ (Westland Tai Poutini National Park)

Figure 1: Pilot sites location map

[1] The term *pilot* in this report means a period in which the viability and optimisation of paid parking is assessed before wider rollout.

1.3 Pricing methodology

The methodology aims to determine and recommend a reasonable price for paid parking on Public Conservation Land (PCL).

To achieve this, the following steps were completed:

1. Conduct technical analysis and propose an initial fee structure.

   This included:

   - A review of existing carparking prices in the market (Section 3.2 - Car park market insights)
   - An analysis of how the car parks are used including typical parking durations, typical vehicle types, and daily demand (Sections 4.2, 5.2 and 6.2 - When and how people use the car park)
   - An analysis of each of the site's key experiences, and challenges relating to implementing paid parking (Sections 4.1, 5.1 and 6.1 - Site context and key visitor experiences)
   - An evaluation of the findings from these analyses to determine a reasonable fee structure based on a set of guiding principles.

2. Gather initial feedback from stakeholders and the public based on an information leaflet (Example of Dolomite Point leaflet DOC-10348175) and incorporate feedback into fee structure.

   Feedback was gathered from:

   - Treaty partners
   - Internal stakeholders including district teams and subject matter experts
   - External stakeholders including concessionaires, tourism industry representatives, national special interest groups, local business owners and other affected parties
   - The public including local residents
   - No formal engagement was conducted with the car park users. The analysis recognises their perspectives and has aimed to capture the opinions of users.

3. Seek endorsement from the Project Governance Group and incorporate feedback into fee structure.
4. Gather further feedback from stakeholders and the public based on the release of the draft pricing proposal (Example for Dolomite Point DOC-10428235[2]) and incorporate feedback into fee structure.
5. Determine a final fee structure based on all information gathered through previous steps.

Guiding principles

The fees DOC sets for the use of its facilities are required by law to be "reasonable" fees. Reasonableness in this case is demonstrated through recommending fees at the market rate and is not determined in relation to the cost of implementation. Fair means to be impartial and without discrimination. Fairness and reasonableness are the key principles in the pricing approach. The following areas are also considered important when pricing car parks:

- user choice,
- encourage turnover,
- discourage inappropriate use (such as freedom camping), and
- simplicity.

The proposed fee structure must comply with legal requirements and support DOC's financial sustainability, both of which are evaluated as part of developing the pricing structure (Sections 4.6, 5.7 and 6.6 - Estimated revenue and Section

[2] Online link to the Dolomite Point pricing proposal leaflet.

9 - Legal considerations). The risks of implementing the proposal are documented and have been mitigated where possible (Section 11 - Risk assessment).

DOC has existing pricing methodologies and guidelines to assist with determining the proposed fees. This work has been conducted, where possible, in accordance with DOC's:

- Recreation facilities and services pricing policy [DOC-6396546]
- Pricing guideline [DOC-6532099]
- Strategy and project objectives
- Legal requirements and limitations.

The same approach has been followed for all three car parks and is documented in this report. The approach will be used to create guidelines for setting fees at other DOC car parks.

2 Executive summary and recommendations

The recommended fee structure for all the car parks is a base rolling hourly fee with a daily maximum fee. Before reaching the daily maximum, users pay in hourly increments. All sites have a short free period and two permits: one defined by geographical boundaries and one available to all non-commercial users. Multiday parking is charged through a daily fee which finishes at midnight each day.

A rolling hourly fee structure is a widely adopted model internationally that charges visitors for time spent parked while promoting turnover. The proposed hourly fee structure is informed by the market research; the fee levels are slightly below the market average to reflect the transition from previously free parking. While it is proposed that users pay in hourly increments, smaller increments such as thirty minutes may be explored during or after the trial. (Refer to Section 3.2 - Car park market insights and Section 8 - Testing and refining the fee structure.)

Daily maximum and consecutive day fees are designed to provide a reasonable fee for long-stay and overnight users (e.g., DOC hut visitors) while discouraging uses inconsistent with the car park's intended purpose. For example, encouraging freedom campers to use alternative local campgrounds and encouraging multiday hikers to use alternative car parks in the wider area if available.

A short free period is included to support drop-off activity and improve space availability. This has been tailored for each site to avoid unintentionally rushing visitor experiences. (Refer to use analysis sections 4.2, 5.2 and 6.2.)

Consideration has been given to site specific factors and circumstances such as the neighbouring campground at White Horse Hill, or the impact on the Punangairi Visitors Experience Centre and other local businesses at Dolomite Point. Stakeholders were given the opportunity to provide feedback on the proposal. The feedback was considered and incorporated into the final proposal (Refer to Site context and key visitor experiences sections 4.1, 5.1, and 6.1, and What was heard through engagement sections 4.3, 5.3 and 6.3). Two permits are proposed in response to the feedback; the locals permit recognises the importance of the locations to the local community, while the regular users permit provides an affordable alternative to regular visitors from further afield.

The fee structure is intended to be simple: a single fee applies year-round and to all vehicle types. While the intention is to maintain the fees outlined below throughout the pilot, adjustments may be made to the fees and terms and conditions to address any issues arising and improve efficiency and management. Ongoing monitoring will support this flexibility, allowing the approach to adapt based on insights gained after implementation (Refer to Section 8 - Testing and refining the fee structure).

Recommended fee structure during the pilot:

	Details	Dolomite Point	Franz Josef	White Horse Hill
Time based fees	Hourly Fee (charged in increments of 1 hour)	$5	$5	$5
	Daily maximum fee (till 11:59pm)	$20	$20	$25
	Each day thereafter (till 11:59pm)	$20	$20	$25
	Free drop off period (20 minutes)	free	free	free
Permits	Yearly permit for locals (based on district council boundaries)	$10	$10	$10
	Yearly permit for regular users	$60	$60	$60
Charge for non-payment	$75 breach notice fee for non-payment of parking fees			
	$20 late payment fee to apply where breach notice fee is not paid within specified timeframe*			

*Table 1: Summary of recomended fees for each site. *Timeframe to be determined in collaboration with vendor.*

3 Tourism, economic and market research

3.1 Tourism and economic context

The tourism industry in New Zealand has almost fully recovered since the covid-19 pandemic and is continuing to grow. Visitors from some countries have already surpassed pre-pandemic arrival levels, and by March 2027 total arrivals are expected to be 102% of pre pandemic levels[3], Figure 2. The three car parks are at destinations popular with international tourists, so growth in international arrivals is expected to increase demand at these car parks.

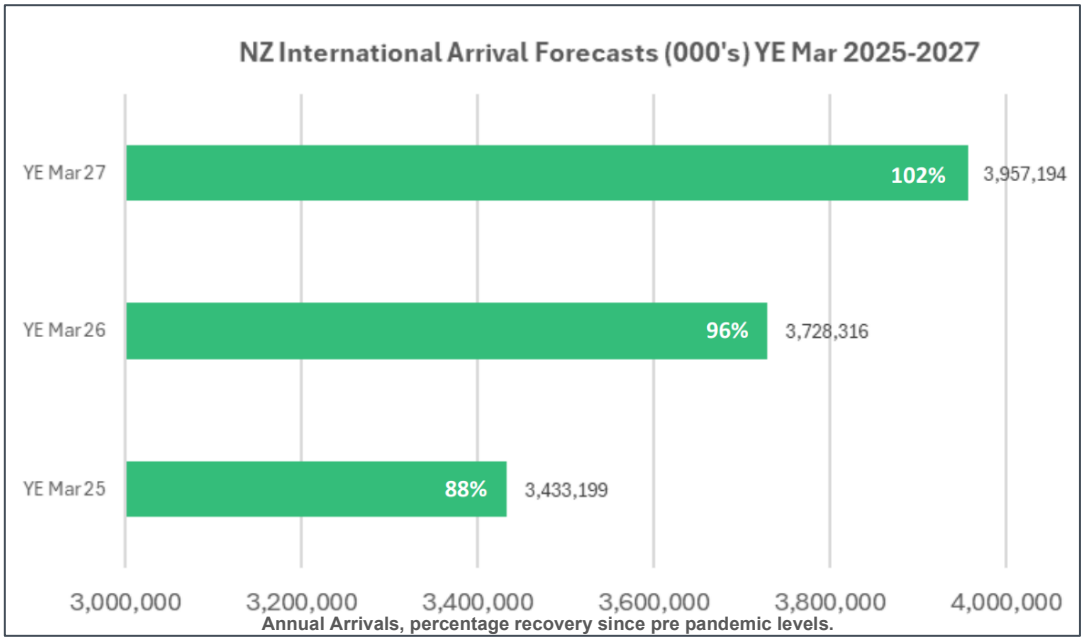

Figure 2: International arrivals by year including percentage recovery since pre pandemic levels. Source: [3]

As well as growing demand, international visitors are also spending more, with annual spend up 23% between 2023 and 2024. In real terms, the median daily spend for international visitors is $232 per person[4].

3.2 Car park market insights

3.2.1 Research overview

Market analysis was undertaken to identify effective fee levels and structures used in setting car park fees. It also establishes a realistic price range that customers are willing to pay for parking in New Zealand and internationally.

Sixteen car parks in New Zealand were reviewed. They are in comparable location types to the three pilot sites. The Milford Sound car park is the most similar to the pilot sites. The full list of included car parks is in Appendix 12.1.

The Milford Sound car park

- is operated by Milford Sound Tourism and is on PCL in Fiordland National Park
- is in a remote location, with limited parking capacity and extremely high demand

[3] Tourism Export Council of New Zealand: International Market Trends and Forecasts 2025-2027, updated 29 January 2025.
[4] Ministry of Business, Innovation & Employment: International Visitors Survey 2024 year end release.

- has a high proportion of internation visitors arriving in a variety of vehicle types and sizes (coach, car, campervan)
- costs $10 per hour and $30 per night per vehicle
- has a strong influence on the pricing of car parks on PCL as it indicates what visitors are willing to pay in these types of locations.

Twenty-four international car parks across five countries were examined. Their locations are shown in Figure 3. They were analysed to understand international pricing structures. These countries are comparable to New Zealand in terms of economic status, and the car parks are in national parks, areas of natural significance or areas of cultural heritage. The sample includes a range of private and public car parks, as well as examples including park and ride systems and bookable spaces. Where possible, the reviewed car parks are in similarly remote locations, and deal with comparable levels of visitor demand. The research was undertaken in March 2025, and all information was up to date at the time of review.

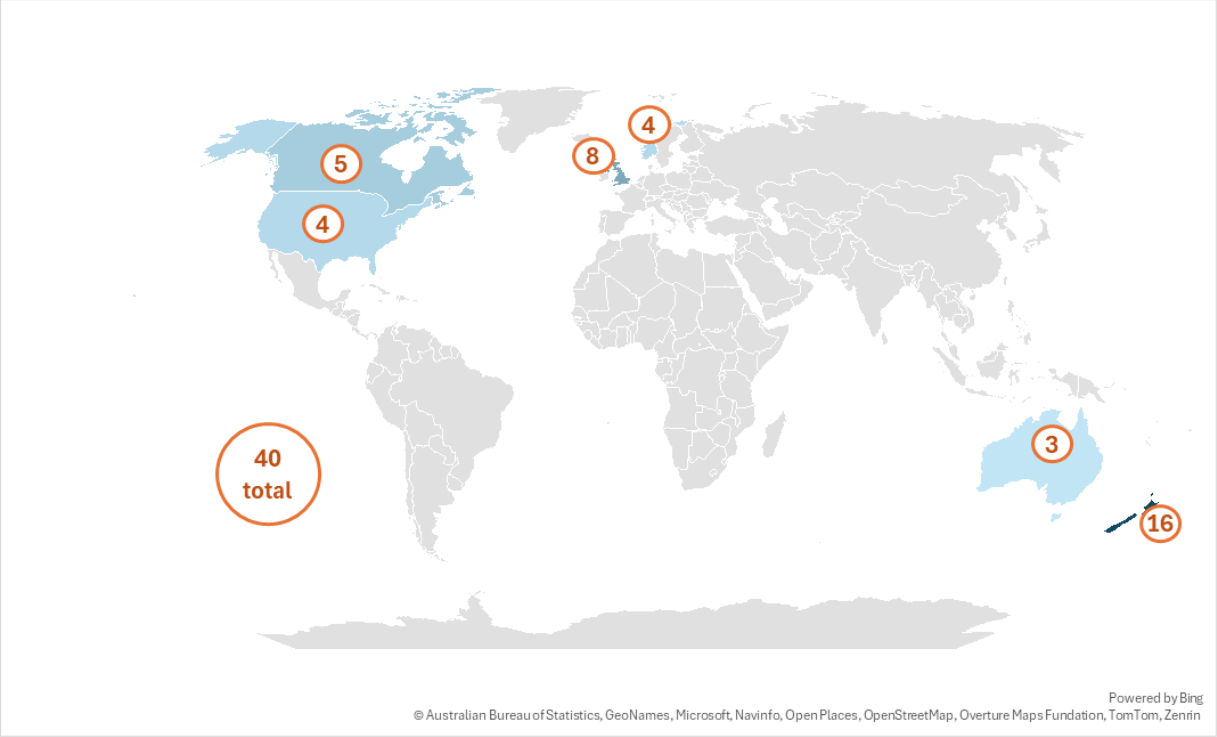

Figure 3: Locations included in car park market research.

The research identified three main approaches to setting car park fees: time-based fees, vehicle category-based fees, and demand-based fees. These three approaches are explored in sections 3.2.2 to 3.2.4.

The full findings of the 2025 pilot project market research are in DOC-10317785.

3.2.2 Time based fees

(1) Hourly fee

The research found an hourly fee structure was the most common type of fee structure. There is no consistent hourly fee in the market, customers pay between $2.50 and $14.00 to park for an hour in New Zealand, see Table 2, page 9. The Milford Sound car park charges $10 per hour, making this considerably higher than the market average.

	Hourly fee				
Type	Sample Size (N)	Average	Median	Min	Max
NZ National Park or similar car parks (including Milford Sound)	3	$ 6.05	$ 4.40	$ 3.75	$ 10.00
NZ Urban car parks	7	$ 6.67	$ 6.00	$ 2.50	$ 14.00
International car parks in National parks or similar	12	$ 6.37	$ 5.27	$ 3.29	$ 13.04
All	22	$ 6.42	$ 5.27	$ 2.50	$ 14.00

Table 2: Hourly fees in the market. Includes car parks where an hourly fee structure (or similar) was in place.

Table 2 includes some car parks which have an access fee. Most of the car parks with access fees also charge for parking. However, the parking fee when associated with an access fee is typically lower to keep the total fee reasonable for visitors. These examples are relevant and have been included in the analysis as DOC is considering legislative change to allow charging for access at some locations in the future.

(2) Daily fee

Twenty-two of the researched sites had a daily fee. The average daily fee is approximately $31, but fees vary widely ($6.80–$90).

Some sites allow only same-day parking. Those sites allowing multi-day stays usually charge the same fee per day. Some sites offer discounts for consecutive days, especially where multi-day experiences are the main draw (e.g. Trolltunga, Norway).

Daily fees are usually structured in one of two ways: a "till end of day" ticket (valid until 11:59 pm) or a 12-hour ticket. The "till end of day" model is simpler and more common, being used by 19/22 sites. It doesn't require the visitor to calculate or remember a unique end time.

The ratio between an hourly and daily fee can influence visitor behaviour. On average, a day fee is about six times the associated hourly fee. With this ratio, visitors parking for more than five hours may consider purchasing a day ticket. To encourage turnover, the price structure should aim to minimise visitors on the day ticket as they have less incentive to leave. Each of the pilot sites was considered individually to determine what ratio is appropriate.

(3) Free grace period

A free grace period enables drivers to use facilities and have a break during long journeys without incurring a fee. It encourages drivers to drop-off, when possible, which is desirable at busy sites. A free period was not common in the researched sample, only occurring in 3 of the 40 sites surveyed.

3.2.3 Vehicle category-based fees

Charging different fees by vehicle category helps reflect each vehicle's impact on congestion and space occupied. Common categories include buses, coaches, and motorbikes.

Most of the car parks in the sample charge all vehicles the same fee, and at the Milford Sound car park coach parking is free to encourage arrivals by coach. Conversely, seven of the forty reviewed car parks featured higher fees for large vehicles (approx. 3.9 times the standard vehicle fee). In these cases, large vehicles were defined either by vehicle length or passenger capacity.

Setting different fees for large vehicles can influence the volume of coach operations. An appropriate fee should be set to encourage the desired outcome for that site, for example lower fees if coach operations and coach parking at the site is desired. Coach operators should be engaged with to understand the impact of fees on behaviour.

3.2.4 Demand-based fees

Some of the car parks in the sample offer reduced evening fees—such as discounted hourly fees after 4 pm—to spread visitor arrivals. This is used at Milford Sound, though Milford Sound Tourism report it has little impact,

potentially due to fixed ferry schedules limiting visitor flexibility. Other evening pricing models include fixed-time slots (e.g. 5pm-7pm) or reduced "till end of day" fees for late arrivals.

Off-peak seasonal pricing is not widely used in the market. Only four examples were found, possibly because many sites surveyed are inaccessible in winter. Some urban sites use weekend and public holiday pricing instead of seasonal off-peak pricing, presumably to encourage visits during those times.

3.3 Conclusion - reasonable fee

The tourism, economic and market research presented in Sections 3.1 and 3.2 shows $5-$7 is a reasonable range for an hourly parking fee.

This is a small fraction of the average daily spend of international visitors ($232) and is considerably less than the Milford Sound car park hourly fee. Factors such as the average length of stay and the value of the car park should be used to determine where in this range DOC should set its fees.

Other aspects of the fee structure such as the ratio between the hourly and daily fee, a free grace period, or demand-based fees are considered at a site-specific level in Sections 4, 5 and 6.

4 Location 1: White Horse Hill car park pricing

4.1 Site context and key visitor experiences

White Horse Hill (WHH) car park is a complex site. The complexity is because:

- parking demand often outstrips supply and visitors park on Hooker Valley Road, and at times creates traffic safety risks on State Highway 80
- there is large variation in length of stay (e.g. several hours to overnighting at huts)
- demand is growing
- there is alternative parking in Aoraki village
- the car park forms part of the access to some lodges
- vehicles often overflow from the neighbouring campground into the car park.

Improving the car park operation and introducing parking fees presents a valuable opportunity to enhance the visitor experience and earn revenue to contribute to DOC's operations. A fee structure should recognise these site complexities.

WHH is the busiest car park within Aoraki National Park and supports multiple experiences of varying lengths. The multiple experiences are shown in Figure 4, page 11. The car park is located at the start of several DOC tracks, including the popular Hooker Valley track and the Sealy Tarns track, and has two toilet blocks to accommodate growing demand. There are no commercial services[5] at the car park, and the Aoraki National Park Visitor Centre is a five-minute drive away in Aoraki/ Mount Cook Village. The car park sits beside the WHH campground, but unclear boundaries between the two often lead to incorrect use of parking spaces for camping. The Wyn Irwin and Thar lodges, which are not Department of Conservation (DOC) lodges, are located next to the car park. While users have a separate area to park, they must drive through the car park for access.

[5] Examples of commercial services are a café, gift shop or exhibition. An example where these are present at a car park is Dolomite Point.

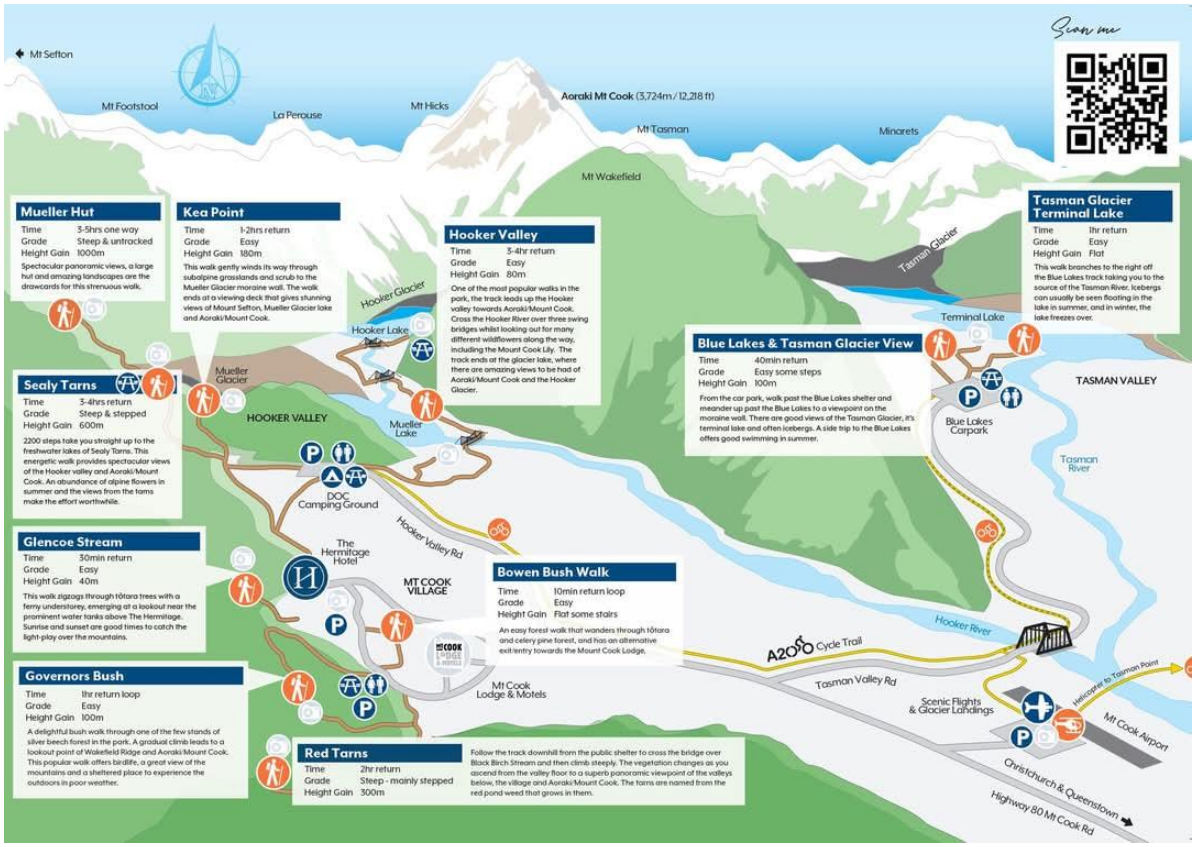

Figure 4: Aoraki National Park diagram showing White Horse Hill and surrounding areas.

Aoraki National Park has three other parking areas: the dedicated airport parking area (ten-minute drive from WHH), the Tasman Glacier car park (ten-minute drive from WHH) and village parking (five-minute drive or thirty-minute walk). In peak months, the WHH car park is often over capacity leading to cars parking along Hooker Valley Road. The current planned approach to managing traffic safety of parking on Hooker Valley Road is to use temporary traffic management on the road, operated by DOC rangers. This could include reduced speed limits, message boards with site information and parking restrictions. However, options to find a more permanent solution to visitors parking on Hooker Valley Road will be evaluated during the paid parking project and the follow-on project; *Sustainable Destinations - Aoraki.*

Site wide demand management options are being considered to maintain the long-term sustainability of the site. These include park and ride solutions, parking restrictions, increasing capacity at WHH and other travel demand management tools.

The experiences in the Park were analysed (DOC-10310333) and show that the WHH car park supports eight medium-high demand experiences. The medium and high demand experiences range from short (<30mins) to overnight in length. These typical durations of stay have been considered in the pricing recommendation to help meet the needs of the different user groups.

The Hooker Valley track has the greatest demand out of the experiences the WHH carpark supports. This track owes its popularity to its accessibility and scenic viewpoints. Its visibility on social media has further driven demand in recent years. As of April 2025, the track is temporarily shortened due to the second swing bridge being closed over safety concerns, pending its replacement. Aoraki National Park staff have already observed a decline in visitor numbers to the park, though the full impact on future visitor behaviour and demand remains uncertain. The full track is expected to reopen in Autumn 2026 after the bridge is replaced. The analysis is based on this track being open. The paid parking pilot will need to be flexible to react to the true impact of this.

4.2 When and how people use the car park

Annual visitor numbers have recovered since the covid-19 pandemic and are forecast to grow at over 4% a year for the next five years. The growth forecast is based on the historical data for the site, domestic and international visitor numbers, weather and tourism spend on fuel.

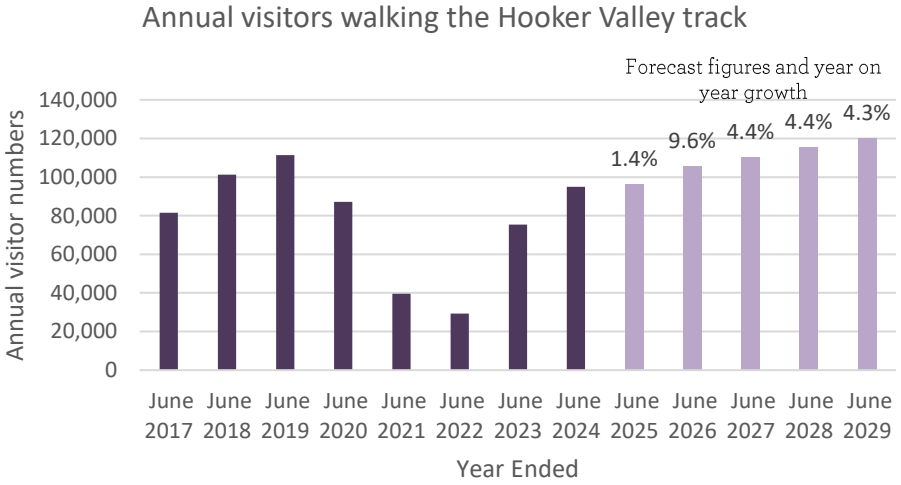

Figure 5: Annual visitors walking the Hooker Valley track[6]

The analysis of car parking currently at the site shows that in the peak months, daily demand for the WHH car park outstrips supply. The analysis also shows that demand at the WHH car park shows a high degree of seasonal variation. The total number of vehicles entering WHH car park per month is three times more in summer than in winter. This is an additional 18,000 cars driving up Hooker Valley Road per month in summer. On average, demand is around 750 vehicles a day, but it can reach 1,200+ vehicles in busier months (Table 3). This high variation is due to several factors, including weather, season and day of the week.

Daily vehicles inbound to the car park		
	January	July
Max	1,245	605
Average	752	235
Median	731	217

Table 3: WHH car park daily vehicle counts Jan 2023 – Mar 2025.

There is a weak negative correlation between rainfall and vehicles arriving to the car park, Appendix 12.3.1. The correlation is stronger in winter, indicating demand is more dependent on weather in the low season. The relationship between demand and weekday follows the same trend. In summer this has a negligible impact on demand, but in winter there are on average 1.3 times more vehicles on a Saturday than a Wednesday.

Most vehicles arrive within a very condensed window in the morning, adding pressure on the limited car park capacity (shown in Appendix 12.2.1). Inbound vehicles rise sharply in the morning between 7 and 11am, followed by a similarly steep decline from 1pm. It would be beneficial to both visitor and carpark management and traffic safety on Hooker Valley Road to be able to spread arrivals more evenly across the day.

The vehicles using Hooker Valley Road consist mainly of cars and vans (92%), which fit in a standard parking space (Figure 6 page 13). The light trucks classification represents long wheelbase campervans, which can often also fit

[6] The graph shows historical figures and the DOC forecast. For more detail on the forecast, refer to DOC-10336234. DOC forecast model includes domestic visitor numbers, international arrivals, a weather variable and tourism expenditure on fuel and automotive products.

into a standard parking space. There are a small number of buses. A different fee for buses would impact very few users while adding complexity to the price structure.

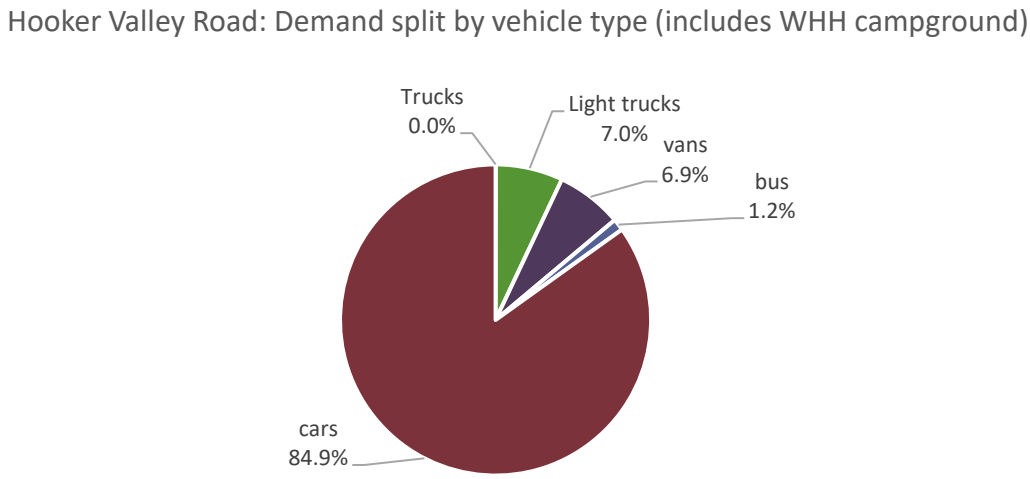

Figure 6: Demand split by vehicle type: car park and campground. Mar/April 2025. N=29,037.

Most of the vehicle demand on the Hooker Valley Road is day traffic (84%). Parking patterns show a range of stay durations for visitors, which reflects the number of different activities there are at WHH. Twelve percent of traffic is drop-off short stay (less than 15 minutes). Most visitors stay between one and six hours. There are very few day visitors with lengths of stay over six hours at the car park. Ten percent of visitors stay for one night (12-24 hours), and the remaining seven percent stay for more than one night. This multi-day traffic is a combination of the campground demand and car park multiday demand.

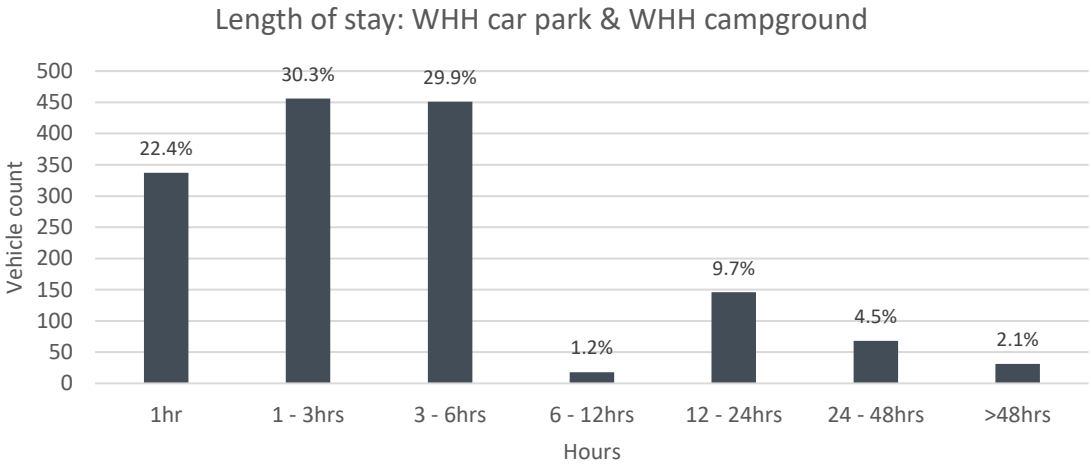

Figure 7: Length of stay: WHH car park & campground. Mar/April 2025. N=1,507.

4.3 What was heard through engagement

DOC engaged with the public about paid parking for WHH carpark in two phases through information leaflets, a webpage and a public meeting. Feedback was gathered in person at the meeting and through email and phone submissions.

4.3.1 Engagement phase 1

Feedback from Phase 1 of the engagement was gathered in response to the information leaflet, DOC-10348186. The key themes related to the pricing strategy are outlined below.

- Free parking for drop off/ pick up or short stays

- Suggestions of diminishing day rates for multi-day users such as mountaineers
- Suggestions of permits or discounts for mountaineering club members
- Locals should be exempt from paid parking.

Refer to the phase 1 engagement report (DOC-10496933[7]) for a summary of all of the feedback including responses.

4.3.2 Engagement phase 2

Feedback from Phase 2 of the engagement was gathered in response to the draft pricing proposal (DOC-10496909[8]). The key themes related to the pricing strategy were similar to those raised in the initial engagement and are outlined below.

- Opposition to paying for parking and concerns about multiday users and volunteers
- Concern about flow on impacts for parking in other areas
- Question about the potential to extend the boundary of the local resident permit into the Waitaki District
- Concern about the long-term condition and management of vehicles at the White Horse Hill car park.

Refer to the phase 2 engagement report (DOC-10500502) for a summary of the feedback.

4.4 Proposed fee structure

The proposed fee structure includes the on-site fees shown on Figure 8. In addition, two permits will be able to be purchased - a $10/ year locals permit and a $60/ year general public permit.

Figure 8: Mock parking sign showing recommended fees. Final sign to be designed in the project.

An hourly fee of $5 per hour is proposed. This is considered reasonable as it falls within the determined market price range. It has been pitched at slightly below the national and global average hourly fee to assist the transition from free parking.

An hourly fee encourages efficient use through turnover and is accompanied by a daily maximum to prevent excessive fees for visitors walking the full day hikes available at the site. A daily maximum of $25 is high enough that most Hooker Valley Track walkers won't reach it. As a result, the day rate will primarily serve long-stay visitors, keeping the incentive on the short stay visitors to depart. $25 is considered reasonable as it is less than the market average and less than the typical fee to park at a comparative DOC tourist destination - Milford Sound ($30, assuming a three-hour cruise).

[7] Online link to the phase 1 engagement report.
[8] Online link to the White Horse Hill pricing proposal leaflet.

The cost for an overnight stay would be $25 for the first day plus $25 for the second day, totalling up to $50. This fee is the lowest price which can be offered to visitors staying at the Mueller or Hooker Huts, whilst ensuring the car park fee is not less than the neighbouring campsite. If overnight parking becomes cheaper than staying at the WHH Campground (which costs $40 for two people per night), it may encourage visitors to pay for overnight parking and stay in the car park instead. The campground charges the same fee all year, which is why off-peak seasonal pricing is not recommended for the WHH car park. For those visiting the Hooker or Mueller Huts, free parking is available in the village as an alternative, though this should not be encouraged.

A free parking period of twenty minutes is proposed to accommodate/encourage drop offs and free up parking space. Twenty minutes is enough time for visitors to use the facilities (e.g. toilets) and drop off/pick up passengers. It is based on the length of stay analysis which shows a large proportion of vehicles stay for fifteen minutes or less. If large vehicles switch to a drop-off only operation at WHH, they will require a parking area to wait before returning for pick-up. This will be monitored, and suitable options will be assessed if required. Consideration was given to whether large vehicles should pay more as this would better reflect the space occupied, more fairly share costs and may increase revenue. However, for the pilot year it was deemed more important to keep the structure simple by charging all vehicles the same fee.

Two parking permits are proposed as a solution to the concerns raised during engagement. These are proposed at the same price point and with the same criteria as the other sites, refer to Section 7.1 - Proposal for a parking permit. In contrast to Dolomite Point, White Horse Hill is not a local community meeting point or hub, and it is over a thirty-minute drive from the nearest town. The locals permit will be offered at White Horse Hill for the pilot, but uptake and usage will be monitored to understand if this permit type is applicable to remote, end-of-road destinations.

The site's current demand pattern shows most visitors arrive within a short space of time in the morning. In time, to enable spreading demand over the day, variations to the fees based on time of day could be tried, see Section 8 - Testing and refining the fee structure.

4.5 Responses to feedback

The main themes from the feedback which relate to price are listed below with a summary of the responses provided. Further detail can be found in the phase 1 and phase 2 engagement reports (DOC-10496933, DOC-10500502) and the phase 2 pricing proposal leaflet (DOC-10496909).

(1) Locals should be exempt from paying for parking

Locals can purchase an annual permit for $10, which allows unlimited access during that year. 'Locals' are residents of the Mackenzie District.

(2) Permits or other solutions for multi day visitors such as mountaineers

Recognising that some regular users come from further afield (and may make multiple visits), an annual permit will be offered to any private vehicle owner for $60 per year. The annual permit allows users to visit an unlimited number of times and to park overnight. No camping is permitted.

(3) Free parking for drop off/ pick up or short stays

This free period will be sufficient for private passenger drop-offs or pick-ups and will allow visitors to get out of the car and stretch their legs without incurring a charge. The duration of the free period also needs to provide for short stays without encouraging people to rush, to enable a positive visitor experience.

4.6 Estimated revenue

Revenue has been estimated for the car park (DOC-10453460). The estimated revenue does not reflect the full potential of the site, as there is no fee (and thus no revenue) for vehicles parking on Hooker Valley Road. Table 4, page 16, sets out the potential revenue from the car park operation. It also includes possible revenue if parking was

charged on Hooker Valley Road or prohibited and carparking provided for in the WHH carpark. However, the carpark would require major expansion to accommodate all the vehicles.

Estimated Revenue Excluding GST	Pilot period: Dec 2025-June 2026		Full Year
	After adjustment for Hooker Bridge 2 closure (50%)	Before adjustment for Hooker Bridge 2 closure	
From car park only	$ 420,000 – 460,000	$ 840,000 – 920,000	$ 1,240,000 – 1,360,000
Potential revenue based on total demand (car park & Hooker Valley Road)	$ 540,000 – 600,000	$ 1,080,000 – 1,200,000	$ 1,600,000 – 1,750,000

Table 4: First year revenue estimates.

Visitor numbers will be closely monitored in spring and adjustments to the revenue forecast will be made as the impact of the Hooker Bridge No.2 closure is better understood. A section of the track is still open, and it is expected that demand will bounce back when the bridge is in place and Hooker Valley Track fully re-opens.

The key inputs used to generate the forecast are:

- the vehicle counts from the DOC road counter on Hooker Valley Road
- the capacity at the car park is 275 vehicles
- the length of stay behaviour observed in the traffic monitoring survey in March 2025
- the arrival demand curve observed in the traffic monitoring survey in March 2025.

The key assumptions in the forecast are:

- 10% of fees are not or unlikely to be collected due to visitors not paying the correct fee and unsuccessful debt collection
- the length of stay behaviour remains unchanged throughout the year
- decrease in traffic does not change car park capacity
- 100% of day parking visitors are willing to pay the fee
- the impact of the Hooker Bridge 2 closure is a 50% reduction in demand. Note that a shorter walk remains open whilst the Bridge improvement works are completed
- there is no overspill from the neighbouring campground into the car park and 100% of visitors overnight parking are not willing to pay the fee
- the arrival demand curve remains unchanged after paid parking implementation
- parking charges are in place from December 2025.

Analysis in the project detailed business case estimated revenue to exceed operational costs (DOC-7783951).

5 Location 2: Dolomite Point car parks pricing

5.1 Site context and key visitor experiences

Dolomite Point (DP) consists of two car parks, north and south, both accessed from the state highway. The car parks are positioned across the road from the Pancake Rocks track, a popular attraction with unique rock formations and blow holes, as shown in Figure 9.

Between the northern and southern car parks there are several commercial establishments including a café, a shop, the Punangairi Visitor Experience Centre, and toilets. The Punangairi Visitor Experience Centre was recently opened by Ngāti Waewae and contains the Paparoa Experience[9] and the DOC Visitor Centre.

Within the northern car park there is a post collection point for local residence. The southern car park will be extended and upgraded before the pilot begins. The planned improvements include: a sealed parking surface, marked car parking spaces, improving accessibility by re-levelling an existing steep section and increasing the number of car parks. When complete there will be approximately 152 parking spaces available in total.

There are coach parking bays along the state highway near the car park and another project plans to add more roadside bus stops on the seaward side of the state highway. A risk of implementing paid parking is that visitors park on the state highway instead, see section 11 Risk assessment.

Figure 9: Aerial image of Dolomite Point. Source: Ngāti Waewae and Department of Conservation.

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Figure 10: Map showing experiences near Dolomite Point. Source: Punakaiki maps - Official Punakaiki Tourism Website.

[9] paparoaexperience.com

The visitor experiences at the site were analysed (DOC-10313307) and show there are six experiences with medium and high demand which are supported by the car park. These key visitor experiences are all either short (<30 minutes) or medium (up to 4 hours) in length. The price structure should be optimised for these parking durations, whilst providing options for the small percentage of demand who stay for longer.

There are many other tracks in the area as shown in Figure 10. There are dedicated car parks supporting the other tracks in the area, including the Inland Pack Track and the Pororari River Track. The Punakaiki Cavern has a small area for parking near the entrance. The Paparoa Great Walk is near to Dolomite Point but has dedicated car parks at the start and end of the track. The small town of Punakaiki is a three-minute drive, or a fifteen-minute walk along a footpath on the state highway and has free on road parking.

5.2 When and how people use the car parks

Annual visitor numbers are recovering since the covid-19 pandemic and are forecast to grow for the next five years with higher growth in the next two years (Figure 11).

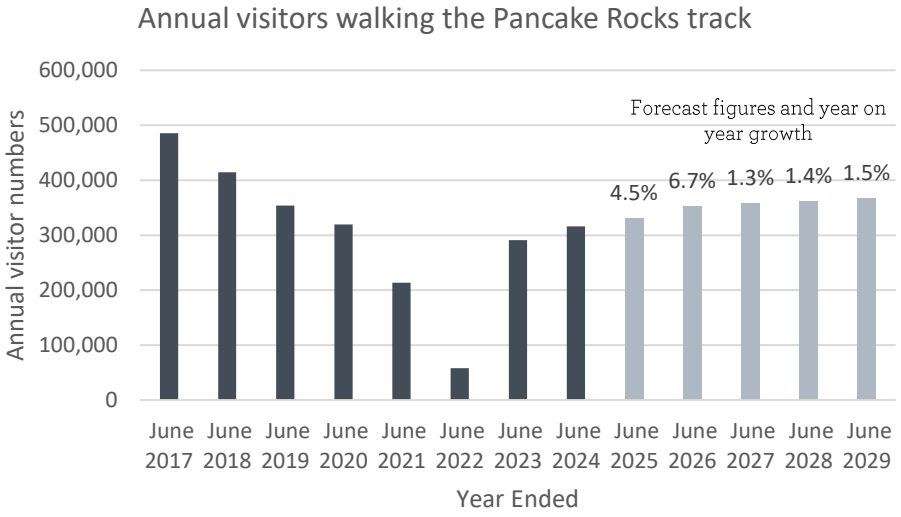

Figure 11: Annual visitors walking the Pancake Rocks track (historical figures and DOC forecast DOC-10336234[10])

DOC staff at site anecdotally report that parking demand regularly outstripped supply in summer 2024/2025. The planned expansion of the southern car park will ease demand pressures temporarily, but visitor growth will likely result in the car park reaching capacity again in the future.

Demand on the Pancake Rocks Track shows a high degree of seasonal variation. The total numbers of people walking the Pancake Rocks Track is six and a half (6.5) times more in summer than in winter. This is an additional 43,000 people on the track in January compared to July.

The analysis of the Pancake Rocks Track activity shows on average, 1,600 people walk the track per day in January, with 2,400 on peak days. This high variation is due to several factors, one of which is weekday. In summer, the day of the week has negligible impact on demand, but in winter, daily demand is over one and a half times higher at the weekend than Monday-Friday.

[10] DOC forecasts are produced by the environmental economist subject matter expert, and the model includes domestic visitor numbers, international arrivals, a weather variable and tourism expenditure on fuel and automotive products.

Daily pancake rocks visitor numbers		
	January	July
Maximum	2,469	742
Average	1,640	252
Median	1,568	254

Table 5: Pancake Rocks pedestrian counter data for year 23 & 24. Jan 2025 was not included as counter was faulty.

The analysis of car parking currently at the site shows vehicles arrive at two points in the day, 10:30am and 2pm, see Appendix 12.2.2. This could reflect typical checkout times at nearby accommodation, distance travelled to the site or visitors travelling less over lunch.

The vehicles using the car park consist mainly of cars and vans (96%), which fit in a standard parking space. The design for the lower car park has been completed and consists of a combination of regular and large parking bays to meet this demand. Coaches and buses use the car park to turn around but park in the dedicated bays on the State Highway. There are a small number of motorcycles, which should be encouraged to park within the car park rather than on the State Highway.

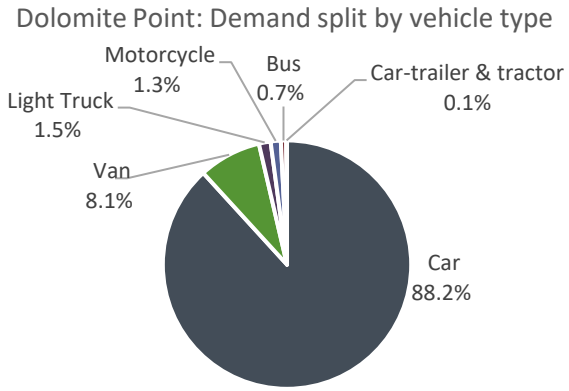

Figure 12: Demand split by vehicle type based on traffic monitoring data for both car parks Mar/April 2025. N=2884

The analysis shows most of the vehicle demand at the car parks is for short durations. For example, 60% of vehicles park for less than one hour. Visitors parking for forty minutes to an hour have likely done the Pancake Rocks Track and briefly visited the other attractions and/or businesses at the site, such as the Punangairi Visitors Centre or the café. Approximately 7% of vehicles park between two and three hours. The analysis shows these vehicles typically arrive at lunchtime.

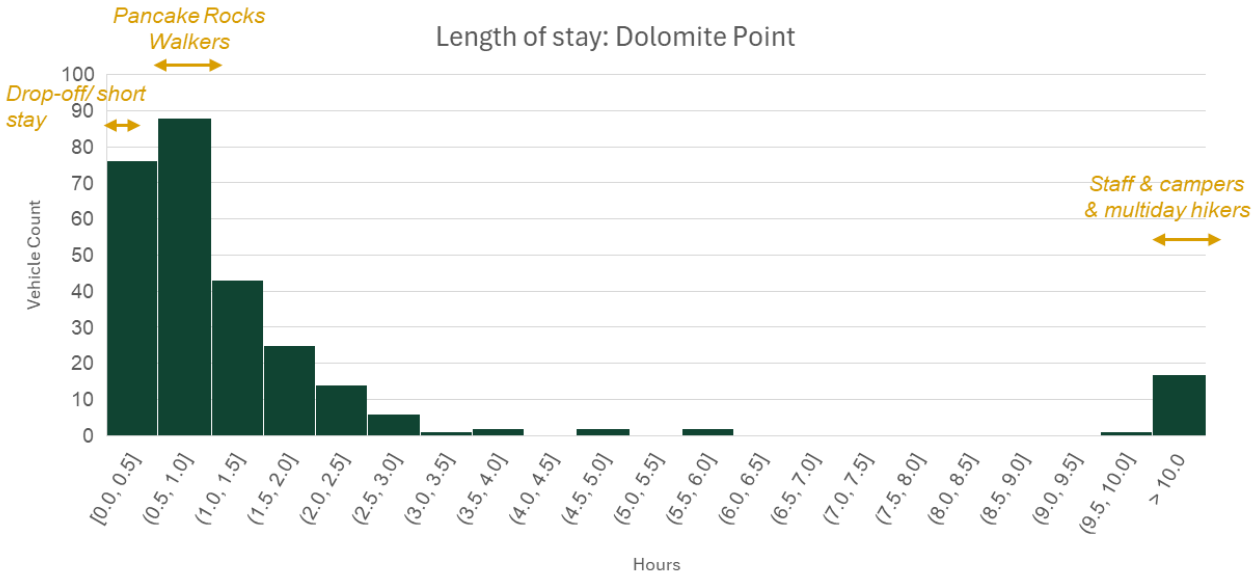

Figure 13: Length of stay data from traffic monitoring for both car parks Mar/April 2025. N=277. Data for vehicles which visited the car park once within a week.

The analysis shows 15% of vehicles park for less than fifteen minutes. This is likely to be vehicles making drop-offs, local residence picking up mail and short breaks for visitors travelling along the West Coast.

The analysis shows a small number of vehicles park for nine to thirteen hours. The arrival times indicate two groups: staff members working day shifts, and visitors' freedom camping overnight (8pm-9am). A small number of vehicles park for multiple days, possibly doing one of the multi-day hikes in the area.

5.3 What was heard through engagement

5.3.1 Engagement phase 1

Feedback was gathered in response to the information leaflet, DOC-10348175. The key themes related to the pricing strategy are outlined below.

- Most of the feedback requested that locals be exempt for paying for parking with suggestions on how this could be done. People explained how they use the location for getting their post, as a place to socialise and a popular stop for people traveling along the coast.
- Suggestions on a free parking period were made ranging from 15 minutes to 2 hours.
- Suggestions were also made about free parking in the winter months to encourage visitors to stop.
- Feedback from the public, partners and stakeholders noted that the project should be encouraging visitors to stay for longer as this was a main justification for the development at Punakaiki. Suggestions were made that there should be a fixed period that is either free or a low fee for 2 or 3 hours to encourage people to stay.

Refer to the phase 1 engagement report (DOC-10496933[11]) for a summary of all of the feedback including responses.

5.3.2 Engagement phase 2

Feedback was gathered in response to the draft pricing proposal (DOC-10428235[12]). The key themes related to the pricing strategy were similar to those raised in the initial engagement and are outlined below.

- Most of the feedback received about Dolomite Point requested that locals still shouldn't pay.
- Suggestions on a free parking period were made to increase it from 20 minutes, suggestions ranged from 30 minutes to 2 hours.
- Request that volunteers and school groups have free parking.

[11] Online link to the phase 1 engagement report.
[12] Online link to the Dolomite Point pricing proposal leaflet.

- Suggestion that the $10 permit is for all people on the West Coast and shouldn't be restricted to one or two Districts.
- Revenue should be used in the location it was generated.

Refer to the phase 2 engagement report (DOC-10438641) for a summary of all of the feedback.

5.4 Fee structure options

The feedback received through the first round of engagement raised concerns regarding whether the fee structure should encourage longer stays, and suggestions were made of a minimum length of stay of two hours to address this. This suggestion was evaluated alongside the leading proposal from the analysis - a rolling hourly rate, Table 6.

Two pricing structures were evaluated:

1. A rolling hourly rate, and
2. First two hours at a fixed fee. There are 2 sub options
    a. a fixed price of $10 for 2 hours and
    b. a fixed price of $5 for 2 hours.

Criteria	Option 1: Rolling Hourly Rate $5/hr	Option 2: A 2-hour minimum length of stay	
		a) $10 for 2 hours	b) $5 for 2 hours
Fair and neutral fee structure, users have freedom to choose to pay for what they use	✓✓✓	×××	✓
Influence on length of stay	Semi-neutral	Minor potential to encourage longer stays, but more likely to cause negative user responses	Potential for people to stay longer, but the fee is well below a fair/ market rate for the facility.
Expected yearly revenue	$430,000	$570,000	$350,000
Manage demand/ reduce site pressure	✓	×	
Non-complex: structure doesn't need to be reassessed if site experiences change	✓(flexible)	× (inflexible)	
Nationally consistent: Makes future price reviews efficient and easy	✓	×	

Table 6: Evaluation of different fee structure options.

Option 2a) is unfair because it would force users to pay for two hours when they typically stay for one. It is therefore not recommended.

Option 1 is recommended over option 2b) as it prioritises fairness to users, simplicity, and consistency, whilst not compromising on the commercial objectives of the project. This is covered in more detail in Section 5.5.

5.5 Proposed fee structure

The proposed fee structure is shown on Figure 14.

Figure 14: Mock up of parking sign to demonstrate how fees could be communicated.

An hourly fee of $5 per hour is proposed. This is considered reasonable as it falls within the determined market price range and is slightly below the national and global average hourly fee to reflect the transition from previously free parking. Most visitors park for less than two hours and would pay $5-$10. The proposed hourly fee is considerably less than the hourly fee at the Milford Sound car park ($10). It is consistent with the proposal for the Franz Josef car park.

The proposed rolling hourly structure prioritises user choice, simplicity and consistency versus other suggested fee structures (See analysis in Section 5.4).

A $20 daily maximum is less than the average identified in the market research ($30) whilst being high enough that short stay traffic should not reach it. Each day costs the same which will discourage use of the car parks for multi-day trips and move this demand to the alternative car parks in the area. Paid parking will also discourage overnight freedom camping at the car parks, moving this demand to local campground businesses.

A free parking period of twenty minutes should encourage drop-off behaviour and allow visitors to use the facilities (e.g. toilets) and/or collect post. The free period is designed to protect the visitors experience by not being long enough that visitors rush the Pancake Rocks Track. This will be monitored during the pilot and the free period length adjusted if required, see Section 8 - Testing and refining the fee structure.

Coaches and buses are not included in the proposal as they should park in dedicated bays on the State Highway. Off peak pricing is not recommended as the value of the site remains throughout the year and the market research shows this style of pricing is not typical at similar sites.

Two parking permits are proposed as a solution to the concerns raised during engagement. These are proposed at the same price point and with the same criteria as the other sites, refer to Section 7.1 - Proposal for a parking permit. Locals and stakeholders also raised concerns regarding community use of the Punangairi Visitors Experience Centre, and this has been addressed within Section 7.2 - Processes to support discounts, waivers and permits.

5.6 Responses to feedback

Each price related feedback theme is listed below with a summary of the responses provided. Further detail can be found in the phase 1 and phase 2 engagement reports (DOC-10496933[13], DOC-10438641) and the phase 2 engagement leaflet (DOC-10428235[14]).

(1) Locals should be exempt from paying for parking

There is a short free period that allows people to pick up post or a coffee. Locals can also purchase an annual pass for $10, which allows unlimited access during that year.

The pricing analysis concluded $60 per year to be a reasonable price for a regular user of the car park, based on a minimum of one 2 hour visit every other month (6 times per year). This frequency of visit was informed by listening to feedback from locals and looking at past DOC survey results. The proposed $10 per year locals only permit is considerably less than the $60 reasonable fee. If used for six 2 hour visits, this would result in an equivalent fee of less than $1 per hour. This fee does not represent the value of the site and is far below any fee identified in the market research.

(2) Volunteers and school groups should be exempt from parking fees

DOC is grateful for the work of volunteers, who help greatly in the maintenance of the visitor network, including huts and tracks. Individuals and groups may apply for a parking fee exemption to perform an activity such as volunteer work, a school trip or community meeting. The DOC project team is working on a user friendly process to enable this process and can provide more information before the pilot commences.

(3) Suggestions on length of free period

This free period will be sufficient for private passenger drop-offs or pickups and will allow visitors to get out of the car and stretch their legs without incurring a charge. The duration of the free period also needs to provide for short stays without encouraging people to rush their walk to the Pancake Rocks. We want to enable a positive visitor experience.

(4) Suggestion that the $10 permit is for all people on the coast and shouldn't be restricted to one or two districts

Locals living within the Grey, Buller and Westland districts are able to apply for a $10 annual permit, which is set at a low and reasonable rate. Westland District has been added because of the feedback DOC have received.

(5) Free parking in winter/ off peak

The value of the site remains throughout the year. The pilot aims to monitor parking demand in both peak and off-peak times to assess the impact of paid parking on demand.

(6) Revenue gets used in the location it was generated

DOC has already spent a lot of money on these sites, especially Dolomite Point and the road at Franz Josef. Biodiversity and visitor network projects exist throughout the country, and DOC will use this revenue where it is most needed.

5.7 Estimated revenue

Revenue has been estimated for both car parks (DOC-10433532).

[13] Online link to the phase 1 engagement report.
[14] Online link to the phase 2 engagement leaflet.

Estimated Revenue Excluding GST	Dec 2025-June 2026	Full Year
Northern car park	$300,000 – 330,000	$410,000 – 450,000
Southern car park	$ 50,000 – 60,000	$70,000 – 80,000
Total	$ 350,000 – 390,000	$480,000 – 530,000

Table 7: First year revenue estimates.

Due to the car park expansion, it is expected that the car parks will rarely reach capacity in year 1. As demand grows, the car parks will reach capacity more frequently, limiting revenue. This impact has been considered negligible for year 1 but will limit revenue growth when conducting long-term forecasts.

The key inputs used to generate the forecast are:

- The pedestrian counts from the DOC track counter on the Pancake Rocks track
- The capacity at the car parks is 152 (83 Northern, 69 Southern)
- The length of stay behaviour observed in the traffic monitoring survey in March 2025
- Visitor growth from the DOC forecast

The key assumptions in the forecast are:

- 10% of fees are not collected due to visitors not paying the correct fee and unsuccessful debt collection
- The southern car park improvement works are complete before the pilot begins
- Both car parks implement paid parking (currently pending land swap agreement)
- The length of stay behaviour remains unchanged throughout the year
- 100% of day parking visitors are willing to pay the fee, and all overnight parking visitors use an alternative free car park
- Parking charges are in place from December 2025

Analysis in the project detailed business case estimated revenue to exceed operational costs (DOC-7783951).

6 Location 3: Franz Josef valley car parks pricing

6.1 Site context and key visitor experiences

The Franz Josef car park supports several short walks, a cycleway, and two day-hikes. One of these walks is the popular Franz Josef Glacier/Kā Roimata o Hine Hukatere Walk. The car park is situated at the end of an access road and is a ten-minute drive from the Franz Josef township. The Te Ara a Waiau Walkway/Cycleway connects the car park to the town. The glacier walk starts from the main car park. This hike is a short and easy track, giving visitors the opportunity to view a glacier in a short stop on their way north or south on the State Highway 6.

The other car park is a small bay area along the access road, with capacity for approximately fifteen vehicles. It is at the start of the Alex Knob track, a challenging day hike. There are no commercial services on-site, there is only a gravel parking area and a toilet.

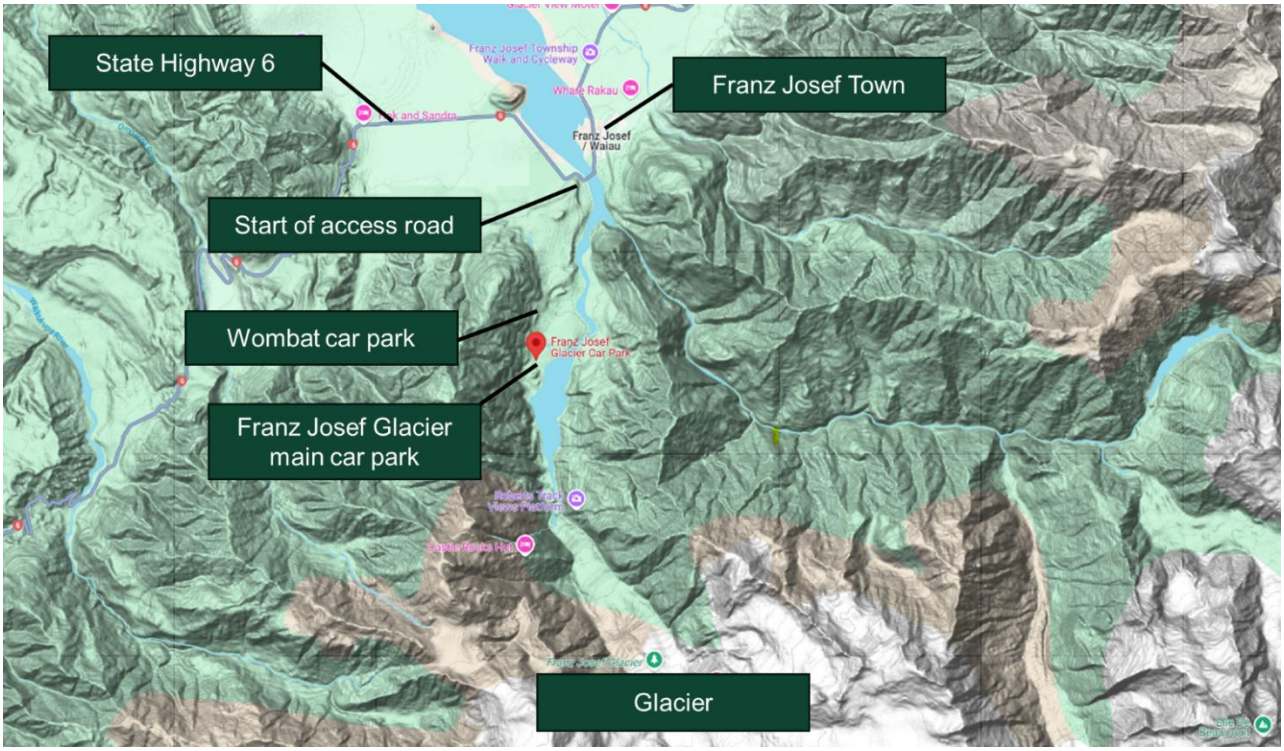

Figure 15: Map showing Franz Josef site.

The glacier is retreating and, given this is the main attraction at the site, this will have a large impact on visitor demand in the coming years. This site plays an important role in the West Coast economy and there are ongoing activities underway at DOC to manage the future of this area (for detail, refer to DOC-7759850 and DOC-10220480). The glacier track has already been shortened due to the changing landscape and may change in length again in the future. The access road is at risk from river gravel aggradation in the Waiho River. The maintenance work required to maintain the road is not guaranteed and is dependent upon decisions outside of the paid parking project. The key issue regarding these problems is that any implementation of paid parking here remains adaptable to this evolving site.

The site's remote location is another challenge when considering its resilience. The site is reliant on the State Highway 6 and the Haast pass for access. Demand at the site is vulnerable to weather events and other hazards leading to closures along these access routes.

The visitor experiences at the site were analysed (DOC-10329703) and show there to be seven high and medium demand experiences supported by the Franz Josef car parks. These all have short (less than 30 minutes) or medium (1-4 hours) estimated lengths. The most common visitor journey (visitors walking the glacier track and using the facilities) is expected to take forty-five minutes to an hour. There are two challenging day hikes (5+ hours) which have lower demand than the more accessible tracks.

6.2 When and how people use the car park

Annual visitor numbers are recovering since the covid-19 pandemic and are forecast to grow for the next five years. The forecasts show higher growth in the next two years followed by shallow growth beyond this.

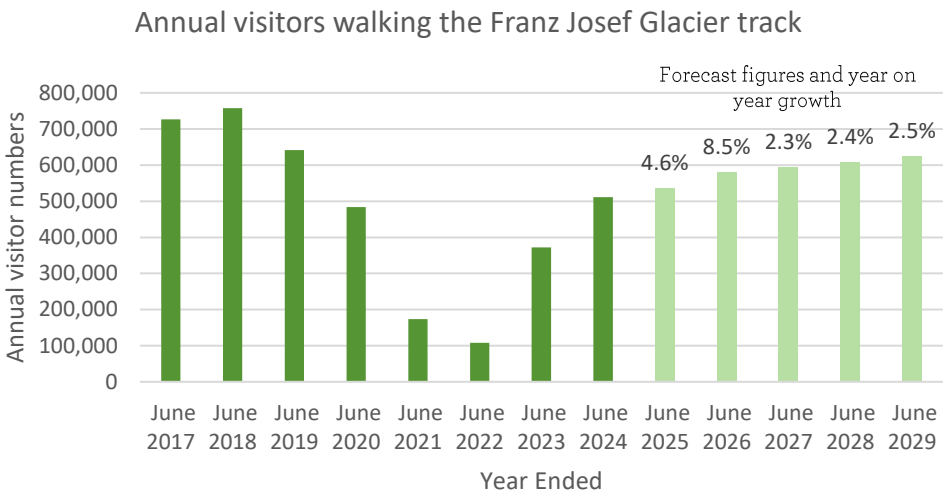

Figure 16: Annual visitors walking the Franz Josef Glacier Track (historical figures and DOC forecast DOC-10336234 [15])

Demand at the car park has a high degree of daily and seasonal variation. The analysis of car parking currently at the site shows the average number of vehicles arriving per day in summer is 600, with a peak of 950. Unlike some other sites, there is no significant difference between the demand on a weekday and that on a weekend. There are about five times more cars entering the site in summer than in winter. The difference between seasons is about 500 cars a day, or 15,000 cars a month.

Daily no. of vehicles arriving at car park

	January	July
Maximum	943	185
Average	600	114
Median	583	121

Table 8: Vehicle data from DOC road counter on FJ access road for January 2025 & July 2024

Sixty-one percent (61%) of visitors arrive before mid-day, with arrivals peaking at 10am, see Appendix 12.2.3. This could be due to 10am check out times of nearby accommodation.

Most (97%) of the vehicles using the car park can fit into a standard parking space. DOC staff annecdotally report that before the covid-19 pandemic the car park was regularly full in summer. Visitor numbers remain below pre-pandemic levels, and visitor turnover has increased because of the shortening of the glacier walk, resulting in the car park not reaching full in the most recent season (2024/2025).

[15] DOC forecasts are produced by the environmental economist subject matter expert, and the model includes domestic visitor numbers, international arrivals, a weather variable and tourism expenditure on fuel and automotive products.

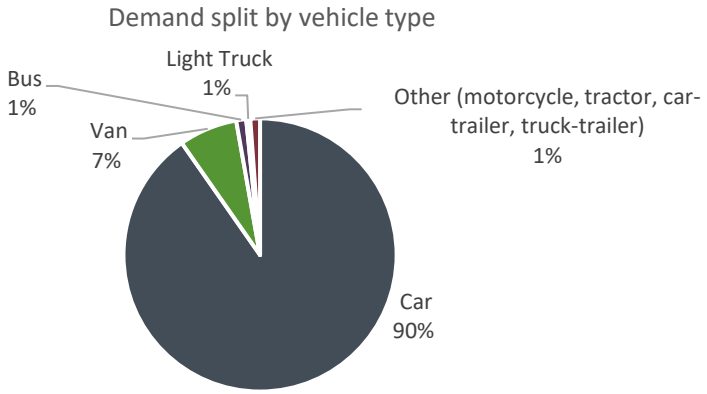

Figure 17: Vehicle demand split based on traffic monitoring data Mar/April 2025. N=3124.

The analysis of parking durations shows most vehicles stay for thirty to ninety minutes, likely walking the short tracks in the area including the glacier viewing track. There is a clear difference in length of stay between vehicles making short stops, up to fifteen minutes, and visitors finishing the glacier walk at approximately forty minutes. Few vehicles park for more than two hours, except for a small number of visitors parking for five to seven hours, which is the estimated time needed to walk the longer day hikes.

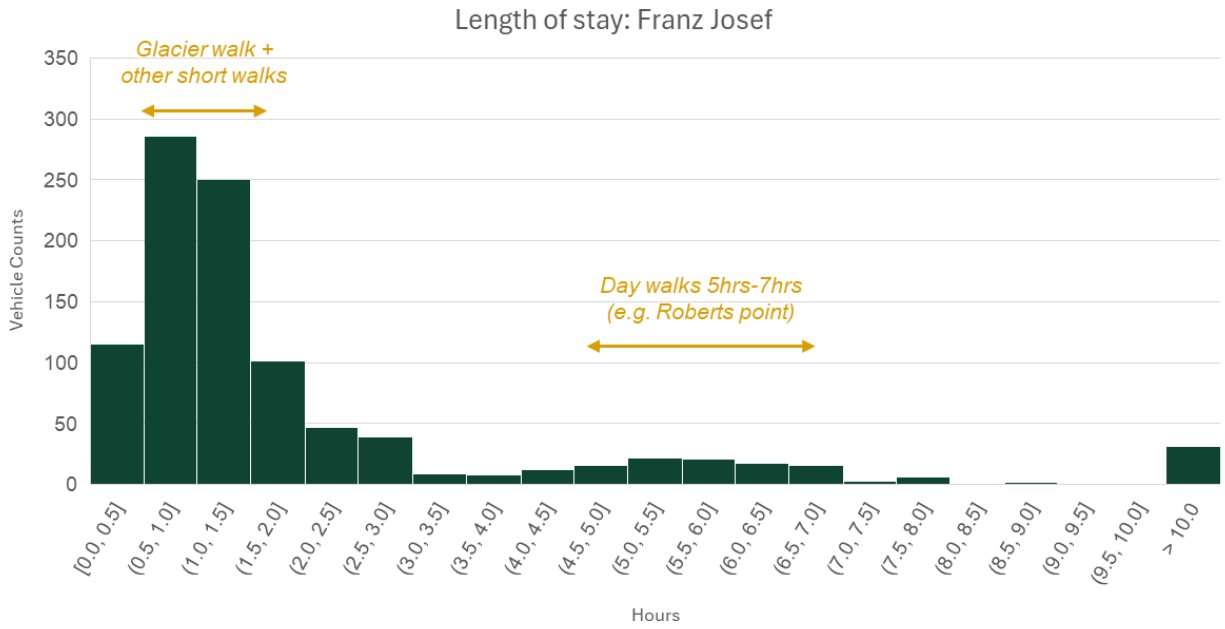

Figure 18: Length of stay split by demand, based on traffic monitoring data Mar/April 2025. N=1002.

The analysis shows a small portion of visitors stay for 10-13 hours, and almost all arrive in the evening, indicating possible overnight freedom camping at the car park. In addition, a small number of visitors are parking for multiple days. There are no multi-day DOC tracks in the area, but some visitors conduct off-track hikes in the region.

6.3 What was heard through engagement

6.3.1 Engagement phase 1

Feedback was gathered in response to the information leaflet, DOC-10348179 . The key themes related to the pricing strategy are outlined below:

- Most of the feedback received about Franz Josef paid parking pilot was about understanding the need for paid parking if locals were exempt. The national park is the residents' 'backyard', and the area is used for people's daily or weekly recreational activities, including many young children of the area.
- Many people were opposed to the idea of paying for parking at all, particularly concessionaires or guides who already pay for their concession and don't have time to be waiting. There were suggestions for the proposed pricing strategy including free pick up and drop offs and types of vehicles that are charged.

Refer to the phase 1 engagement report (DOC-10496933[16]) for a summary of all of the feedback including responses.

6.3.2 Engagement phase 2

Feedback was gathered in response to the draft pricing proposal (DOC-10428230[17]). The key themes related to the pricing strategy were similar to those raised in the initial engagement and are outlined below:

- Most of the feedback received about Franz Josef paid parking pilot was about the local permit, some thought it was still too much and that it should be per household not per vehicle.
- Suggestion for a regional boundary for the local permit.
- Concessionaires and locals were interested in the process for getting a permit.
- Revenue should be used in the location it was generated.

Refer to the phase 2 engagement report (DOC-10438641) for a summary of all of the feedback.

6.4 Proposed fee structure

The proposed fee structure is shown in Figure 19.

Figure 19: Mock up of parking sign demonstrating how the fees could be communicated. Sign to be designed in project.

An hourly fee of $5 per hour is proposed for the same reason as Dolomite Point. Most visitors park for less than two hours and would pay $5-$10. The proposed hourly fee is considerably less than the equivalent fee at the Milford Sound car park ($10). There are also efficiency benefits which come from having the same hourly rate across multiple sites, for example when comparing DOC car park prices to the market in future price reviews.

[16] Online link to the phase 1 engagement report.
[17] Online link to the Franz Josef pricing proposal leaflet.

A $20 daily maximum is reasonable for users of the longer tracks in the area whilst being high enough that the glacier track walkers should not reach it, encouraging turnover of short stay visitors. Each day costs the same, which recognises the value of the site for people staying multiple days. This should discourage camping at the car park, potentially moving campers to local campgrounds instead.

A free parking period of twenty minutes should encourage drop off behaviour, enable the existing shuttle services[18] to operate without paying a fee, and allow visitors to use the facilities (e.g. toilets). It should be short enough that it is not used by glacier track walkers and does not cause rushing behaviour on this track.

If demand increases beyond capacity in the future, two options are proposed for consideration; parking fees could be raised above typical shuttle fees to incentivise use of shuttle services, and the cycleway between Franz Josef town and the car park could be promoted to encourage this under used transport option.

Public feedback suggested off peak pricing to mitigate the negative impact of paid parking on demand in the winter. Off peak pricing is not recommended as the value of the site remains throughout the year and the market research shows this style of pricing is not in place at similar sites. It is not expected that paid parking will have a large negative impact on demand at this site, and this will be monitored during the pilot.

Two parking permits are proposed as a solution to the concerns raised during engagement. These are proposed at the same price point and with the same criteria as the other sites, refer to Section 7.1 - Proposal for a parking permit.

Some aspects of the structure may be refined during the pilot, see Section 8 - Testing and refining the fee structure. The structure should be reassessed if the glacier track changes in length.

6.5 Responses to feedback

Each price related feedback theme is listed below with a summary of the responses provided. Further detail can be found in the phase 1 and phase 2 engagement reports (DOC-10496933[19], DOC-10438641) and the pricing proposal leaflet (DOC-10428230[20]).

(1) **Locals should be exempt from paying for parking, some thought it was still too much and that it should be per household not per vehicle**

There is a short free period that allows people to do pick-ups and drop-offs. Locals can also purchase an annual pass for $10, which allows unlimited access during that year.

The pricing analysis concluded $60 per year to be a reasonable price for a regular user of the car park, based on a minimum of one 2 hour visit every other month (6 times per year). This frequency of visit was informed by listening to feedback from locals and looking at past DOC survey results. The proposed $10 per year locals only permit is considerably less than the $60 reasonable fee. If used for six 2 hour visits, this would result in an equivalent fee of less than $1 per hour. This fee does not represent the value of the site and is far below any fee identified in the market research.

The $10 per year annual permit is per vehicle only. A vehicle owner can apply for multiple vehicle annual permits at $10 per year per vehicle.

(2) **Free parking in winter/ off peak**

The value of the site remains throughout the year. The pilot aims to monitor parking demand in both peak and off-peak times to assess the impact of paid parking on demand.

[18] Franz Josef Glacier Shuttle
[19] Online link to the phase 1 engagement report.
[20] Online link to the Franz Josef pricing proposal leaflet.

(3) Suggestion for a regional boundary for the local permit

Locals living within the Grey, Buller and Westland districts are able to apply for a $10 annual permit, which is set at a low and reasonable rate. Grey and Buller Districts have been added because of the feedback DOC have received.

(4) Revenue should be used in the location it was generated

DOC has already spent a lot of money on these sites, especially Dolomite Point and the road at Franz Josef. Biodiversity and visitor network projects exist throughout the country, and DOC will use this revenue where it is most needed.

6.6 Estimated revenue

Revenue has been estimated for the site (DOC-10433535).

Estimated Revenue Excluding GST	Dec 2025-June 2026	Full Year
Year 1	$ 650,000 – 720,000	$920,000 - $1,010,000

Table 9: First year revenue estimates.

Due to demand not yet fully recovering since the covid-19 pandemic, it is expected that the car park will rarely reach capacity in year 1. As demand grows, the car park will reach capacity more frequently, limiting revenue. This impact has been considered negligible for year 1 but will limit revenue growth when conducting long-term forecasts.

The key inputs used to generate the forecast are:

- The vehicle counts from the DOC road counter on the Franz Josef car park access road
- The capacity of Franz Josef Valley car parks is 239
- The length of stay behaviour observed in the traffic monitoring survey in March 2025
- Visitor growth from the DOC forecast

The key assumptions in the forecast are:

- 10% of fees are not collected due to visitors not paying the correct fee and unsuccessful debt collection
- The length of stay behaviour remains unchanged throughout the year
- 100% of day parking visitors are willing to pay the fee, and all overnight parking visitors use an alternative free car park
- Parking charges are in place from December 2025

Analysis in the project detailed business case estimated revenue to exceed operational costs (DOC-7783951).

7 Reduced fees - discounts, waivers and permits

7.1 Proposal for a parking permit

Feedback from engagement prompted an investigation into the potential to offer a permit for all the pilot sites. This was in direct response to requests for free parking from the local community and regular users from further afield such as mountaineers.

Three options were evaluated; no permits offered, a parking permit open to anyone, or a 'locals only' parking permit open only to those in a specific geographical area. Table 10 shows the evaluation of each option.

<table>
<tr><th>No permit</th><th>Yearly permit open to all</th><th>Yearly permit for local residents</th></tr>
<tr><td>Risk public backlash, locals may stop using the sites.</td><td colspan="2">Incorporates feedback into fee structure, particularly what was heard from the local community.</td></tr>
<tr><td rowspan="2">No additional costs or processes.</td><td rowspan="2">Some additional administrative costs. (maybe negligible)</td><td>Considerable additional administrative costs.
Risk of negative reaction from visitors for having to prove residency, as seen in Great Walks</td></tr>
<tr><td>Risk of significant challenge from public on the boundary of the permit criteria.</td></tr>
<tr><td>Locals and others can still make short stops for free (up to 20 minutes).</td><td colspan="2">Risk that visitors abuse permit. For example, excessive use in peak season making the already busy car parks busier.
Impact likely negligible as uptake expected to be low vs. total demand.</td></tr>
<tr><td></td><td colspan="2">Lower revenue by underestimating use when pricing the permit.
Impact likely negligible as uptake expected to be low vs. total demand.</td></tr>
<tr><td></td><td>Same pricing options for everyone. The permit could be priced high enough that one-off users (e.g. internationals) are unlikely to use it, whilst avoiding the added complexity of differential pricing.</td><td>Creates differential pricing between locals and other visitors. If that permit is used excessively then this difference would be unfair. (Local taxes do not fund local sites any more than the general public.)</td></tr>
</table>

Table 10: Evaluation of permit options for the car parks.

The yearly permit open to all is the most efficient solution; it offers a simple solution for both locals and regular users and is likely to have lower administration costs and higher revenue. The yearly permit is proposed to cost $60 for 1 year. It is estimated that regular users visit the site eight or more times a year. At $60, the permit is equivalent to six 2-hour visits a year and is considered a reasonable price.

7.1.1 Endorsement by Governance Group

This analysis was presented to the Project Governance Group, along with a summary of the engagement feedback. The recommendation to introduce a $60 annual permit, available to all, was endorsed. The district operations team advocated for free parking for locals, and the group agreed that a discounted permit should be offered to locals to acknowledge the significance of these locations to nearby communities. A fee of $10 per year for the local permit was endorsed.

The proposed pricing structure includes two permits:

- $60 Yearly permit open to all - to increase the affordability and accessibility to nature by providing an alternative payment option for regular visitors who do not live within the defined local area
- $10 Yearly permit open to locals - to recognise the significance of the site to the local community and to offer a discounted price for these individuals

The permits:

- Will provide unlimited parking for the year
- Can only be granted to private vehicles

- Cannot be granted to coaches or buses, or be used for commercial purposes
- Cannot be used for multiple car parks (i.e. one permit per car park)
- Cannot be used for camping in the car parks
- Can only be granted to residents of the relevant local district (applies to local permit only)

Uptake of the permits will be monitored and reviewed to understand if they are meeting their purpose. If the permits are being abused, the price could be changed, or they could be discontinued.

The current proposal is that the vendor[21] will provide a web-based purchase environment to support the permit application process. Standard operating procedures are being developed to support this as outlined in Section 7.2.

7.2 Processes to support discounts, waivers and permits

There are some cases where it is desirable to waive parking fees or to offer reduced fees per visit through a yearly permit. These cases will require administrative support and with paid carparking being an additional function will increase baseline operational costs for DOC. To support waivers, discounts and permits, a set of standard operating procedures will be developed, outlining administrative tasks required from DOC, the vendor or the car park user. The proposed cases are listed below, along with some additional considerations. The standard procedures will be developed in later stages of the project.

- A $10 per year local permit, as outlined in Section 7.1 - Proposal for a parking permit. This permit will be based on district council boundaries and valid for one year from the date of purchase.
- A $60 per year regular user permit, as outlined in Section 7.1 - Proposal for a parking permit. This permit will be open to any non-commercial operator, is not bound to any specific geographical area, and is valid for one year from the date of purchase.
- DOC employees. DOC employees do not pay for other DOC facilities as part of the employee benefit program. The intention is to include car parks in this benefit.
- DOC district operations and Visitors Centre team. Local staff should have an easy and practical process to enable free parking at the sites.
- Authorized groups or individuals conducting activities at site where it is appropriate to waive fees, for example:
    - Volunteers
    - Contractors

  This will be handled on a case-by-case basis, and authorisation for waiving parking fees will sit with the relevant district Operations Manager.
- Community meetings and events. Some community meetings and events held at the Punangairi Visitors Experience Centre will have fees waived for attendees. This will be at the discretion of the relevant Operations Manager.
- DOC visitors. Some DOC visitors may be in fleet vehicles, but some may be in private vehicles. The intention is to waive fees for these individuals.
- Concession holders. Concessionaires will be exempt from parking fees during the pilot to provide DOC time to consider how parking fees interact with crown activity fees. A process will be defined which allows holders of a valid concession to park for free.

[21] The vendor is the partner who will supply the paid parking hardware and services to DOC.

8 Testing and refining the fee structure

Running this pilot gives DOC the opportunity to learn and to optimise the fee structure and management based on visitor responses and administrative practicalities, costs, efficiencies and effectiveness. Certain elements of the fee structure could be adjusted based on feedback and analysis through the pilot phase.

As different fees are implemented, both during and after the pilot, the impact on demand can be measured. This will estimate price elasticity for car parks. Price elasticity of demand (PED) measures how much the demand for a product or service changes when its price changes. If a small price change causes a big change in demand, the product is considered elastic. If demand changes very little with a price change, it's inelastic. PED would enable DOC to more accurately create the desired impact on demand and revenue through changing the price.

Some aspects of the fee structure which could be adjusted or introduced are:

- The length of the free parking period
- Varied fees based on time of day to understand how effective this is at spreading demand evenly across the day
- Varied fees based on vehicle type: this is not currently recommended as the first implementation of paid parking should be simple, but could be trialled so the fee reflects the impact on congestion and the space
- Varied fees based on season: this is not currently recommended as the value of the site remains through the year but could be trialled if paid parking negatively impacts winter demand
- Discounts for DOC hut users to bring down the overall cost of the visitors' experience
- The increments at which users pay for parking, for example paying in fifteen-minute increments

The impact of implementing paid parking will be measured using data such as the DOC counter network, transaction data, and visitor surveys.

9 Legal considerations

Legal advice was obtained to understand the legal authority and mechanisms for charging for parking, enforcing parking fees, and restricting parking in specific areas at the three sites (DOC-10277999). Key findings are summarised in the below sections.

9.1 Legal authority for charging for parking

Franz Josef and WHH are in National Parks, whereas Dolomite Point is in a Local Purpose Reserve. The legal advice is that under the relevant legislation (Conservation Act 1987, Reserves Act 1977 and National Parks Act 1981) DOC can impose charges for parking at all three sites.

The advice also is that charges are reviewed and endorsed by an appropriate delegated decision maker. This endorsement step has been built into the project plan.

9.2 Mechanisms for enforcing parking fees

The two main mechanisms for enforcing payment are set out below.

9.2.1 Infringement fines

DOC can create bylaws specifying non-payment of car park charge as an infringement offence. Bylaws can create an infringement offence for non-payment of parking fees or overstaying any time restrictions upon which fines can

be set. In the absence of bylaws, DOC is unable to issue infringement offences to people for overstaying the time period or not paying.

DOC currently does not have any bylaws enabling enforcing parking fees at the pilot sites. DOC has an SOP for making bylaws (DOC-5602563) and this process can take "...typically at least 12 months...". This means creating a new bylaw is not possible before the pilot start date.

9.2.2 Contractual mechanisms

An alternative option to infringement fines is civil/contractual enforcement, something which is often done in private car parks and is founded on the terms and conditions for using the car parks. This typically involves clamping or towing vehicles until fees owing are unpaid, rather than debt collection through the courts or disputes tribunal (which remains an option if clamping or towing is not available). This option will be explored and finalised with the successful parking hardware and services vendor with support from DOC's legal team.

A $75 fee for non-payment of parking fees is proposed, referred to as a Breach Notice Fee. This was recommended by the vendor and is comparable to those used by councils (for example, Wellington council charge $70). The vendor also recommended an additional $20.00 late payment fee to apply where payment is not received within the specified timeframe. A late payment fee is typical in the industry, and the time frame will be in determined by DOC and the vendor.

9.3 Restricting parking in specific areas

There is value in restricting parking in certain areas near the three pilot sites to improve visitor safety and other site-specific reasons: for example, restricting parking on Hooker Valley Road. This can be done through "no parking" signs, and it is desirable to be able to legally enforce these restrictions. As with enforcing parking fees, the legal mechanism for enforcing restricted parking areas is through bylaws.

There are bylaws at WHH and at Franz Josef which make parking in restricted areas an infringement offence (Bylaw 9 of the Mount Cook National Park Bylaws 1981 and Bylaw 9 of the Westland National Park Bylaw 1981). While this is an effective legal mechanism for enforcing restricted parking areas there must be a will to do this, and it must be resourced to work.

There are no offences in the Reserves Act that can be used to enforce parking restrictions at Dolomite Point. New bylaws are required to do this and will not be in place before the beginning of the pilot.

10 Technical constraints

It is critical that the proposed fee structure is technically feasible to implement, for example that the desired fee structure can be loaded into a payment machine. To reduce this risk, the proposal is based on existing pricing methods and approaches identified in the market. The structure is not unnecessarily complex, and the three sites have been designed to be as similar as possible.

DOC will work with the parking hardware supplier to achieve the recommendations in this report and will work through any adaptations if required.

11 Risk assessment

The table below sets out the main risks linked to introducing paid car parking at the pilot sites. For each risk, it shows what the impact could be and what steps can be taken to reduce or manage it.

Risk Type	Site	Risk	Rating	Mitigation
Cost recovery	All	Revenue does not cover costs.	Low	Revenue estimates include adjustment factors for Hooker Bridge No. 2 closure and other known events. Early estimates suggest cost will be recovered. Revenue will be assessed during the pilot, and price adjustments may be made.
Legal	s.9(2)(g)(i)			
Stakeholder relationships	DP	Negative impact on visitation to Punangairi Visitor Experience Centre (managed by Ngāti Waewae).	Med	People generally accept paying when making use of a service like parking. The fee structure was designed to be neutral and to enable visitors to choose how long they stay. The ability to pay in small increments may further mitigate this risk. The impact of paid parking will be monitored, and changes can be made if needed.
	DP	Negative impact on local businesses at place.	Med	
Technical constraints	All	Pricing structure is too complex and cannot be implemented by supplier.	Low	The pricing structure has been designed with simplicity as principle and to be comparable to commonly used car park price structures so it is familiar to users.
Visitor experience	All	Significant change to visitor length of stay (new track introduced/ existing track changes length).	Med	The fee structure was designed to be neutral in this regard but will be reviewed if necessary. Close collaboration with district teams on timings will enable changes to be dealt with proactively not reactively.
	All	Poor uptake of local permit leading to locals not using the car parks. Feedback from the commissioner of reserves and the local community expressed concerns regarding the $10 permit fee.	Low	The local permit fee is heavily discounted versus the determined reasonable fee of $60. The uptake of permits will be monitored and prices reviewed if necessary.
	All	Parking fees cause visitor rushing behaviour (risk to visitor safety and/or diminish visitor experience).	Low	The fee structure was designed to be neutral in this regard. The risk will be monitored during pilot.
	All	Visitors unsure how long to pay for parking.	Med	The payment process is still being defined with the vendor but will include an option to pay on exit for those who have forgotten to pay on arrival or took longer than expected. Ensure website/signs at place are consistent and accurate when stating track lengths.
	All	Visitors have a negative perception of value for money and this leads to a reduction in visitation.	Med	Fee is reasonable and fair and incorporates feedback gathered through engagement. It will be monitored and adjusted as part of the pilot findings.
	FJ	Combined impact of glacier retreat and paid parking leads to	Med	Fee is reasonable and fair and incorporates feedback gathered through engagement. This along with visitor

Risk Type	Site	Risk	Rating	Mitigation
		negative perception of value of site and potential reduction in visitation.		numbers will be closely monitored and adjusted as part of the pilot findings.
Measuring impact	All	Unable to track impact of paid car park due to lack of baseline data pre-implementation.	Low	Baseline data for each site has been reviewed and is deemed suitable for tracking annual visitor numbers. Note that issues with the data quality from the DOC counter network have been flagged.
	All	Inaccurate car park usage analysis due to data quality issues with the DOC counter network.	Med	Baseline data for each site has been reviewed and is deemed suitable for tracking annual visitor numbers. Recommendation made to upgrade counter network at key sites. Once pilot has started analysis can be supplemented with data from the paid parking licence plate recognition technology.
Transport effects	WHH	Increased vehicles parking in free areas such as Hooker Valley Road or in the village, causing congestion and safety hazards.	High	Consider how to reduce this through design phase of project and monitor through the pilot.
	DP	Increased vehicles parking on the State Highway near the car park causing safety hazards.	High	Consider how to reduce this through design phase of project. This issue will be monitored during the pilot and adjustments made if required.
	DP	Visitors of the Punakaiki Cave no longer park at DP car park resulting in the small bay area by the cave overspilling onto the highway.	Med	Consider how to reduce this through design phase of project. Monitor these impacts closely throughout pilot.
	WHH	Coaches drop off passengers and then park in other areas around the National Park causing congestion and safety issues.	Med	Understand risk through engagement with bus and coach community. Reduce this though pricing structure and design.
	DP	Incorrect vehicles park in bus stops and impact on tour coach accessibility.	Med	Use signage to ensure tour coach bays are used correctly. Monitor over the pilot and respond as necessary.
	All	Negative impact to visitor demand in off-peak season.	Low	People generally accept paying when making use of a service like parking. This will be monitored as part of the pilot and fees/parking management adjusted as required.
Legal considerations	s.9(2)(g)(i)			

Table 11: Risk table for paid parking at the 3 pilot sites.

12 Appendices

12.1 Market Research: Car park list

Group	Location	Country	Relevance	Type
NZ National Park or similar car parks	Milford Sound car park	NZ	1 (benchmark)	National Park or similar
	Hotwater Beach Main Car Park	NZ	2	National Park or similar
	Cathedral caves	NZ	2	National Park or similar
	Mount Hutt Ski Field	NZ	2	National Park or similar
	The Remarkables Ski Field	NZ	2	National Park or similar
	Cathedral cove	NZ	2	National Park or similar
NZ Urban car parks	Safer Parking - Te Anau	NZ	3	General Parking
	Man Street Public Car Park - Queenstown	NZ	3	General Parking
	Wilson parking corner stanley & shotover street - Queenstown	NZ	3	General Parking
	Williams Road Public Car Park - Paihia Northland	NZ	3	General Parking
	Auckland downtown car park	NZ	3	General Parking
	Christchurch central parking - central park asaph street	NZ	3	General Parking
	Christchurch bus station car park - the crossing car park	NZ	3	General Parking
	wellington cable car - Wilson parking HSBC tower	NZ	3	General Parking
	Kaiteriteri beach car park	NZ	3	General Parking
	Auckland zoo car park	NZ	3	General Parking
International car parks in National parks or similar	Ben Nevis visitors centre car park	UK	3	National Park or similar
	Pen Y Pass centre car park - Snowdonia (Yr Wyddfa) Wales	UK	3	National Park or similar
	Wasdale lakehead car park - Lake district national park	UK	3	National Park or similar
	Durdle Door Car Park	UK	3	National Park or similar
	Pen Y Fan car park	UK	3	National Park or similar
	Malham Cove car park - Yorkshire dales national park	UK	3	National Park or similar
	Giant's Causeway main car park	UK	3	National Park or similar
	Stone henge car park	UK	3	National Park or similar
	Blue Mountains parking area including echo point and three sisters	Australia	3	National Park or similar
	Cradle Mountain car park	Australia	3	National Park or similar
	Cape Byron Lighthouse supporting car parks	Australia	3	National Park or similar
	Kjerag car park	Norway	3	National Park or similar
	Trolltunga car park	Norway	3	National Park or similar
	Preikestolen/ Pulpit rock car park	Norway	3	National Park or similar
	Briksdalsbreen - glacier hike car park	Norway	3	National Park or similar
	Lake Louise Banff / lake agnes trail car park	Canada	3	National Park or similar
	The Grotto shoreline/ bruce peninsula car park	Canada	3	National Park or similar
	Sentinel Pass/ Moraine Lake car park	Canada	3	National Park or similar
	Capilano Suspension Bridge Park	Canada	3	National Park or similar
	Joffre Lakes Trail car park	Canada	3	National Park or similar
	Diamond Head car park - Hawaii	USA	3	National Park or similar
	Hā'ena car park - Hawaii	USA	3	National Park or similar
	Cadillac Mountain car park	USA	3	National Park or similar
	Denali national park car park	USA	3	National Park or similar

Table 12: Car parks included in the market research sample.

12.2 Inbound and outbound demand profiles

12.2.1 White Horse Hill: Inbound and outbound demand curve

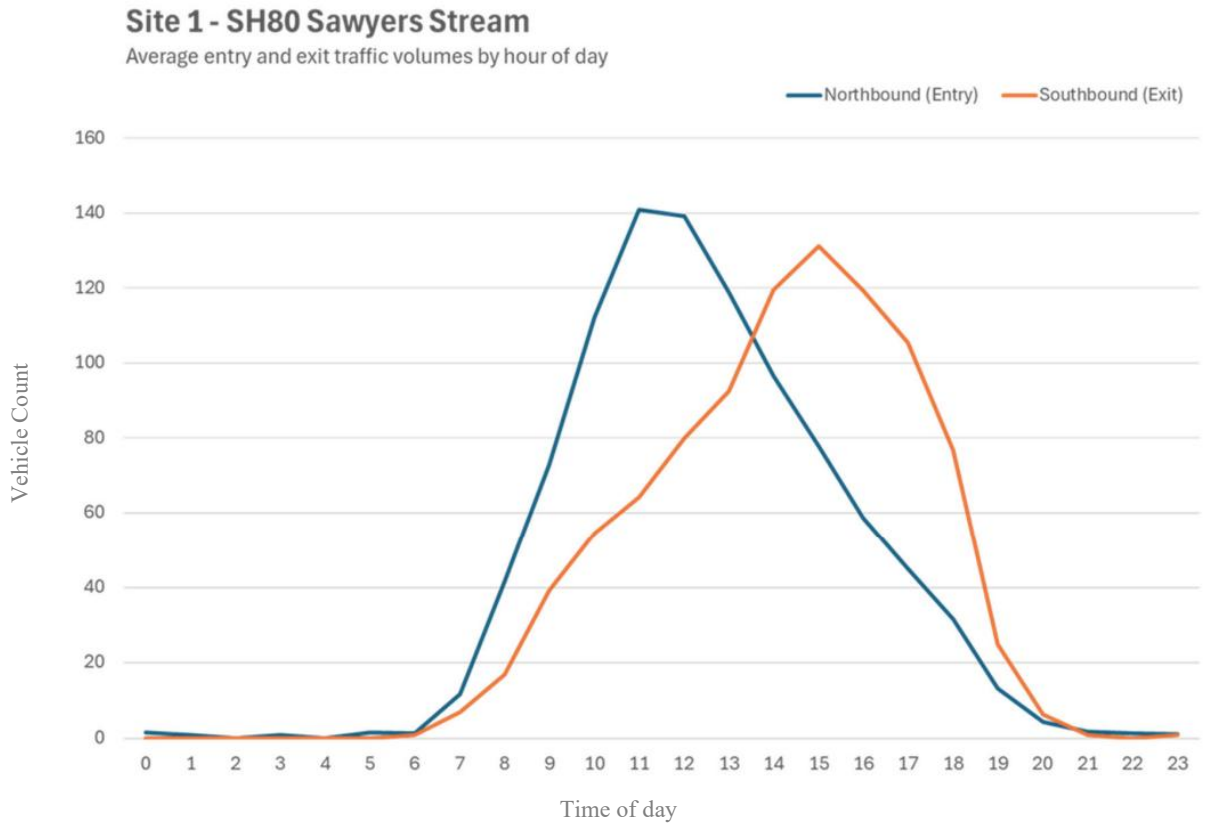

Figure 20: Inbound and outbound daily demand. Source: Urban Connection traffic monitoring March/April 25.

12.2.2 Dolomite Point: Inbound and outbound demand curve

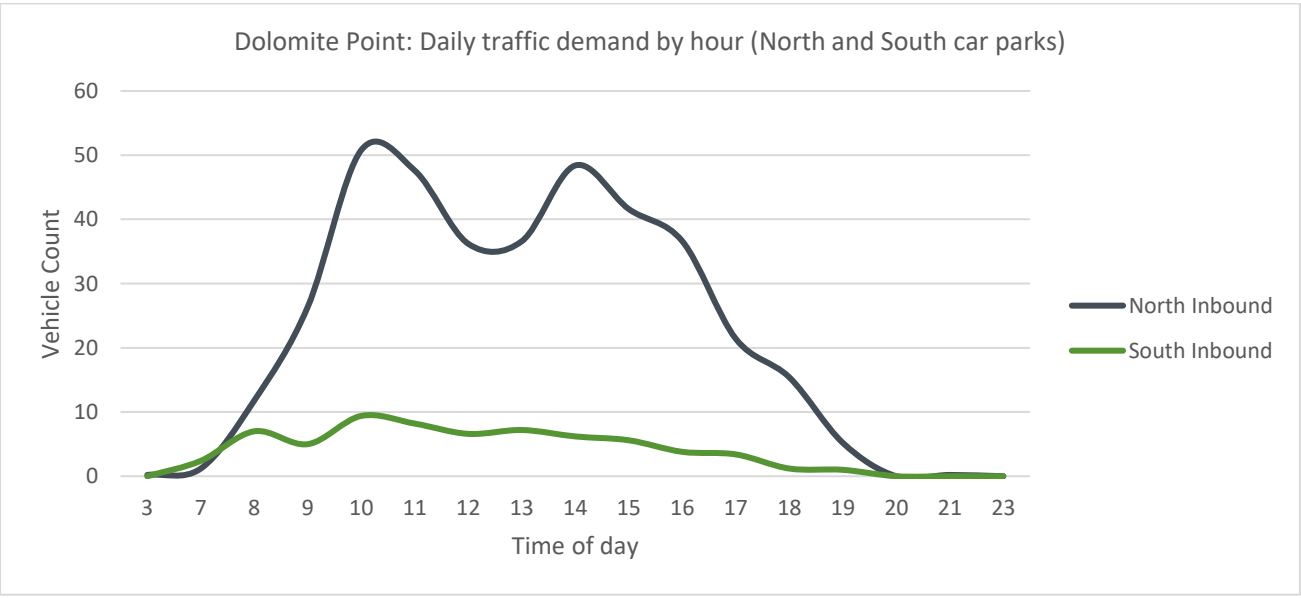

Figure 21: Inbound daily demand. Source: Urban Connection traffic monitoring March/April 25.

12.2.3 Franz Josef: Inbound and outbound daily demand curve

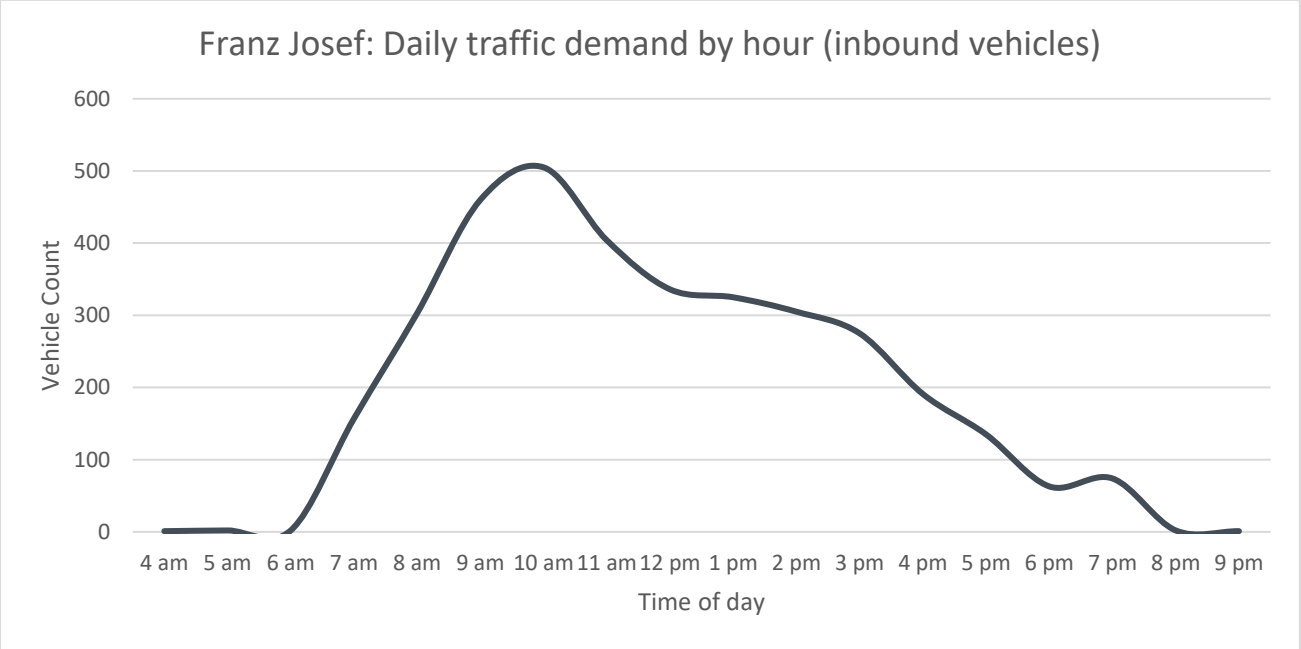

Figure 22: Inbound daily demand. Source: Urban connection traffic monitoring March/April 2025.

12.3 Demand regression analysis

12.3.1 White Horse Hill: Relationship between demand and rainfall

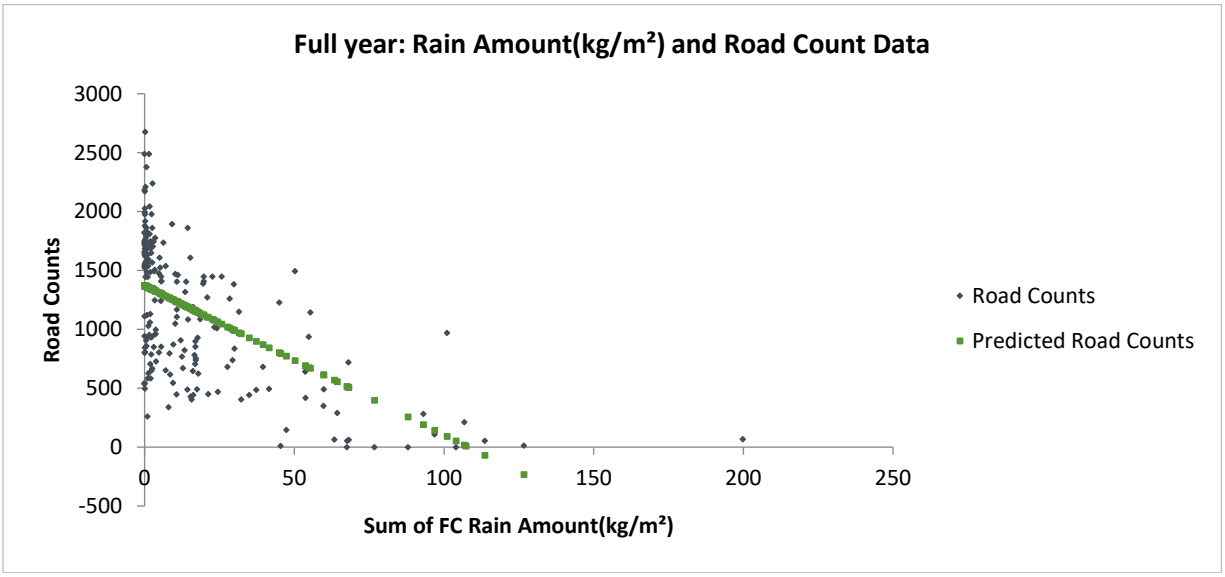

Figure 23: Relationship between road counts and rainfall. August 2024-Feb2025. Road counter data is a sum of both directions along the Hooker Valley Road from the DOC counter. Rainfall data is exported from NIWA forecast software. $R^2 = 0.37$.

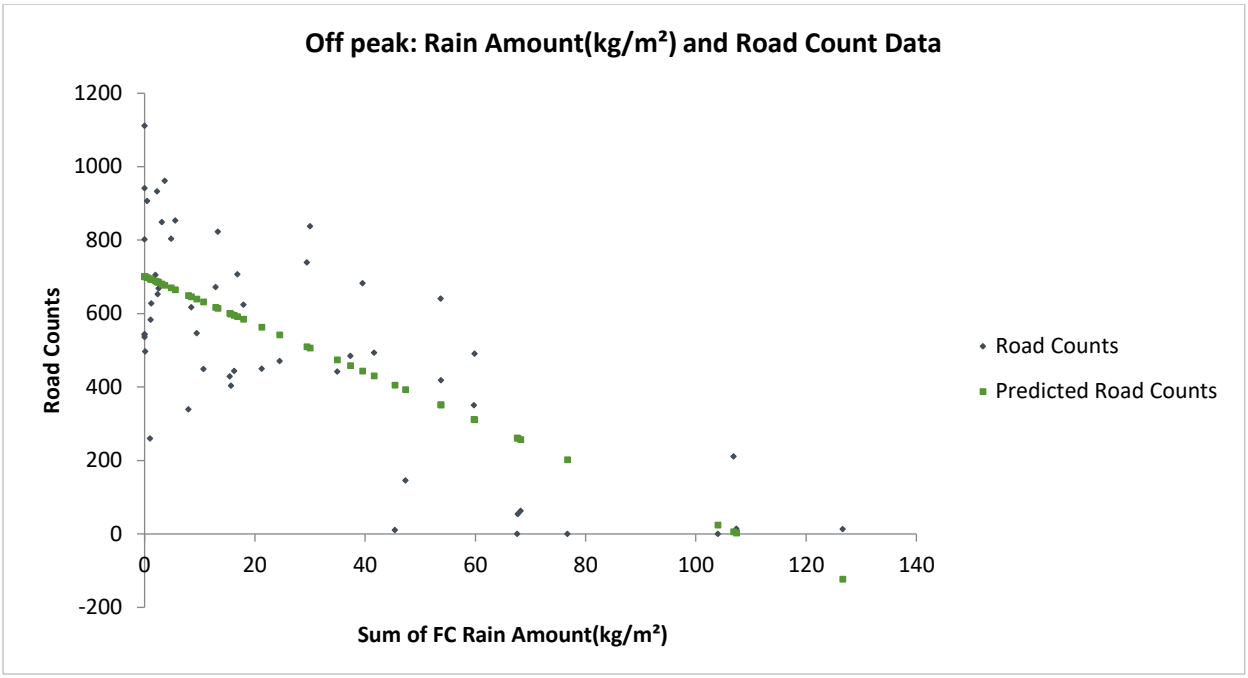

Figure 24: Relationship between road counts and rainfall. August & September 2024. Road counter data is a sum of both directions along the Hooker Valley Road from the DOC counter. Rainfall data is exported from NIWA forecast software. $R^2 = 0.55$.