

DOC PUBLIC PULSE OF CONSERVATION

Monthly Topline Report – September 2022

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28 September, 2022



GAME CHANGERS



KEY FINDINGS – SEPTEMBER '22

- 44% of New Zealanders have visited at least one Protected Natural Area in the past month, while 27% have visited at least one Protected Heritage Place in the past month.
- Visitor frequency for both Protected Natural Areas (1.6) and Protected Heritage Places (0.8) remains stable compared to August (1.7 and 0.9 respectively).
- Most visitors to Protected Natural Areas felt their experience provided an enjoyable level of exercise and that they would be happy to re-visit. Cleanliness of toilet facilities and information about nature and Māori culture could be improved upon.
- Most visitors to Protected Heritage Places feel they would be happy to re-visit again if the opportunity arose.



SUMMARY


- 1. Background & Methodology**
- 2. Visitation Frequency**
- 3. Visit Satisfaction**
- 4. NPS**
- 5. 'Thrive' Module**

BACKGROUND & METHODOLOGY



Sample size

1,000




Fieldwork dates
September 7-17, 2022

Interview duration
5 minutes



Methodology

Interviews were conducted online (self-completion). Respondents were recruited from Ipsos and Ipsos partner panels.



Weighting procedures

No weighting has been applied to the data, as in-field quotas ensured a representative sample was obtained.

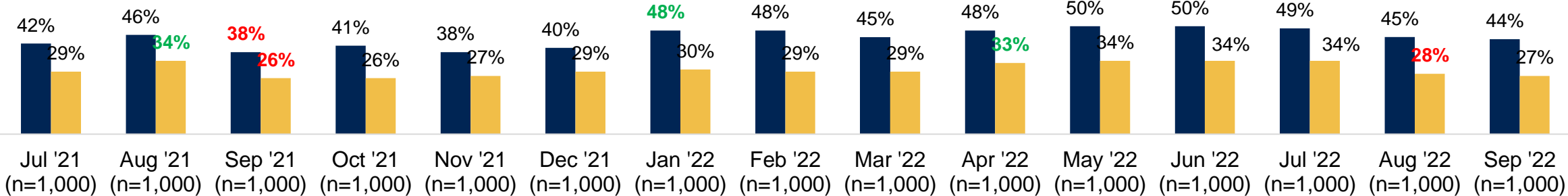
Previous waves

Jun 21	10–21 June, 2021
Jul 21	6–12 July, 2021
Aug 21	2–6 August, 2021
Sep 21	3–9 September, 2021
Oct 21	1–7 October, 2021
Nov 21	5–12 November, 2021
Dec 21	3–9 December, 2021
Jan 22	6–15 January, 2022
Feb 22	5–15 February, 2022
Mar 22	3–10 March, 2022
Apr 22	1–11 April, 2022
May 22	5–16 May, 2022
Jun 22	3–11 June, 2022
Jul 22	4–13 July, 2022
Aug 22	15-24 August, 2022

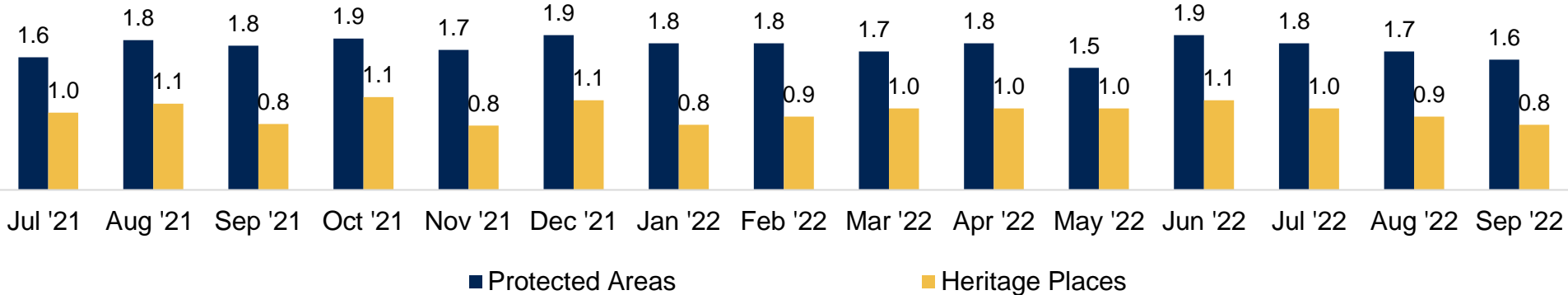
VISITATION FREQUENCY

THE PROPORTION OF NEW ZEALANDERS VISITING A PROTECTED HERITAGE PLACE REMAINS AS LOW AS LAST MONTH, REFLECTING THE ANNUAL WINTER DIP.

New Zealanders visiting at least one Protected Natural Area or Protected Heritage Place in the last month



Average number of visits in the last month*



Demographic differences (August)**

Protected Natural Areas

- 2.6 18–34 years
- 3.7 Māori
- 0.3 65+ years

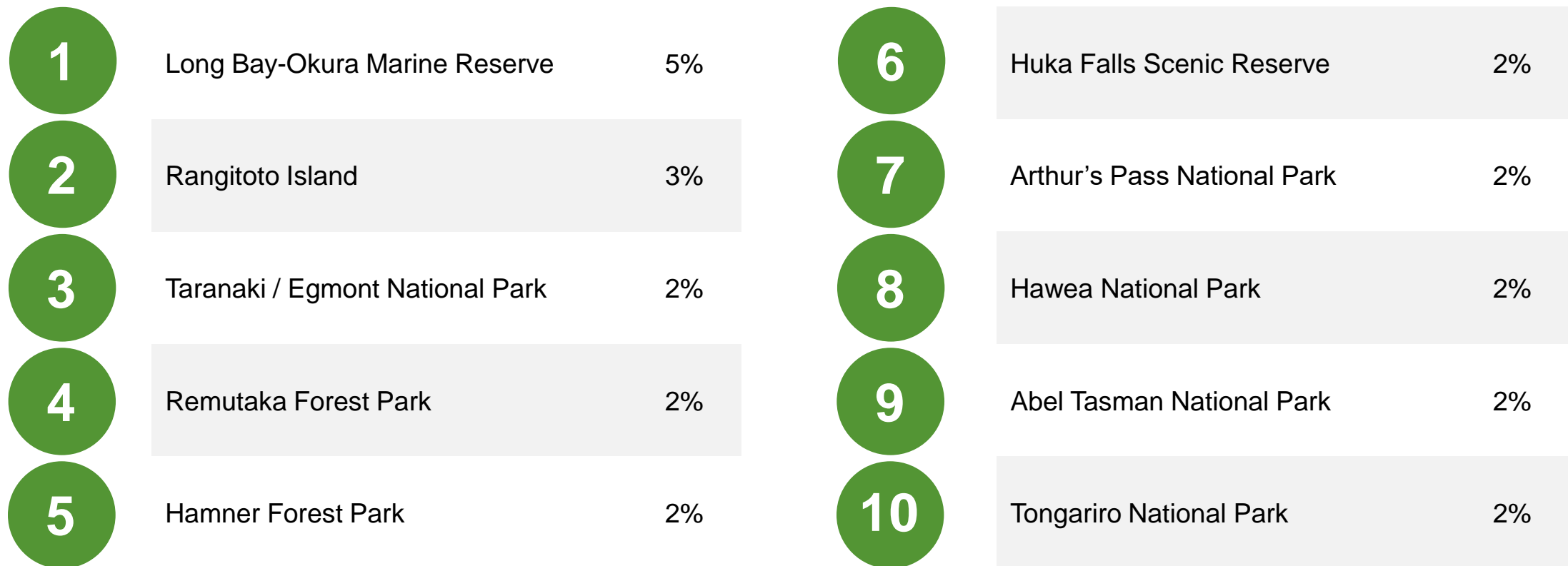
Protected Heritage Places

- 2.0 Māori
- 1.5 18–34 years
- 0.2 65+ years

Q6a: How many times, if any, have you visited any of New Zealand's Protected Natural Areas within the last month? / Q18a: How many times, if any, have you visited any of New Zealand's Protected Heritage Places within the last month? *Note: 'Unsure' responses are excluded. Bases vary for Protected Natural Areas and Protected Heritage Places. **Note: Significant differences versus total.

Green / red indicates significantly higher / lower than previous month

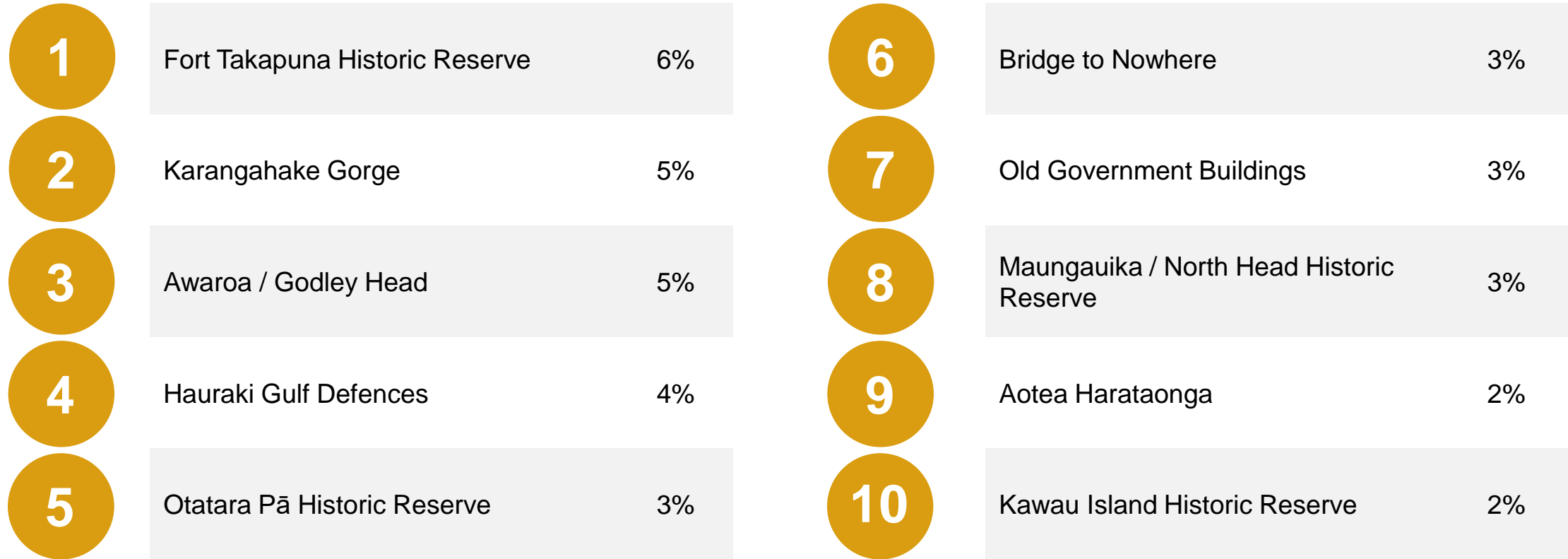
TOP-10 PROTECTED NATURAL AREAS VISITED: JUN 2021–SEP 2022



Q8: Which of these Protected Natural Areas did you visit most recently? Select the location that is strongest in your memory.

Base: Those who have visited a Protected Natural Area (n=7,120)

TOP-10 PROTECTED HERITAGE PLACES VISITED: JUN 2021–SEP 2022



Q20: Which of these Protected Heritage Places did you visit most recently? Select the location that is strongest in your memory.

Base: Those who have visited a Protected Heritage Place (n=4,762)

SHORT WALKS & SIGHTSEEING REMAIN THE MOST COMMON ACTIVITIES AT PROTECTED NATURAL AREAS.

Top activities when visiting Protected Natural Areas*

	Total	Jun'21	Jul'21	Aug'21	Sep'21	Oct'21	Nov'21	Dec'21	Jan'22	Feb'22	Mar'22	Apr'22	May'22	Jun'22	Jul'22	Aug'22	Sep'22
Base (n=)	6,233	392	422	464	380	407	379	401	478	477	450	484	504	498	492	451	436
Short walk (<3 hours)	37%	37%	38%	36%	38%	35%	33%	33%	41%	33%	41%	38%	38%	38%	38%	44%	42%
Sightseeing	29%	29%	28%	29%	32%	29%	29%	24%	31%	27%	30%	30%	32%	31%	30%	35%	34%
Photography	24%	25%	29%	26%	26%	21%	22%	21%	24%	24%	27%	24%	25%	24%	25%	26%	26%
Bird / wildlife watching	25%	25%	27%	28%	24%	26%	26%	24%	22%	20%	24%	25%	24%	24%	25%	26%	24%
Day walk / hike (>3 hours but not overnight)	23%	25%	25%	23%	26%	21%	25%	26%	22%	21%	20%	24%	21%	26%	21%	23%	23%
Connecting with nature	22%	22%	21%	25%	22%	17%	25%	21%	21%	21%	24%	24%	25%	25%	26%	20%	22%
Picnic, barbeque, etc	20%	20%	21%	17%	19%	17%	20%	19%	22%	21%	22%	22%	18%	19%	20%	20%	21%
Connecting with history	13%	10%	13%	14%	14%	11%	17%	10%	12%	11%	16%	14%	14%	13%	13%	10%	13%
Camping	12%	15%	14%	12%	14%	14%	14%	12%	16%	14%	13%	12%	11%	11%	11%	11%	8%
Connecting with culture	10%	8%	9%	11%	11%	8%	11%	12%	10%	11%	10%	10%	12%	7%	11%	8%	8%
Boating / sailing	9%	9%	9%	10%	5%	8%	8%	8%	10%	10%	10%	9%	9%	8%	8%	7%	6%

Green / red indicates significantly higher / lower than previous month

Demographic differences (August)

Age:

New Zealanders aged 65+** are more likely to go for a short walk (60%).

Gender:

Males are less likely to connect with nature (14%).

Ethnicity:

Māori** are more likely to connect with culture (17%).

Green / red (demographics) indicates significantly higher / lower than total

Q12: Thinking about your most recent visit to <LOCATION SELECTED IN Q8>, which of the following activities did you engage in?

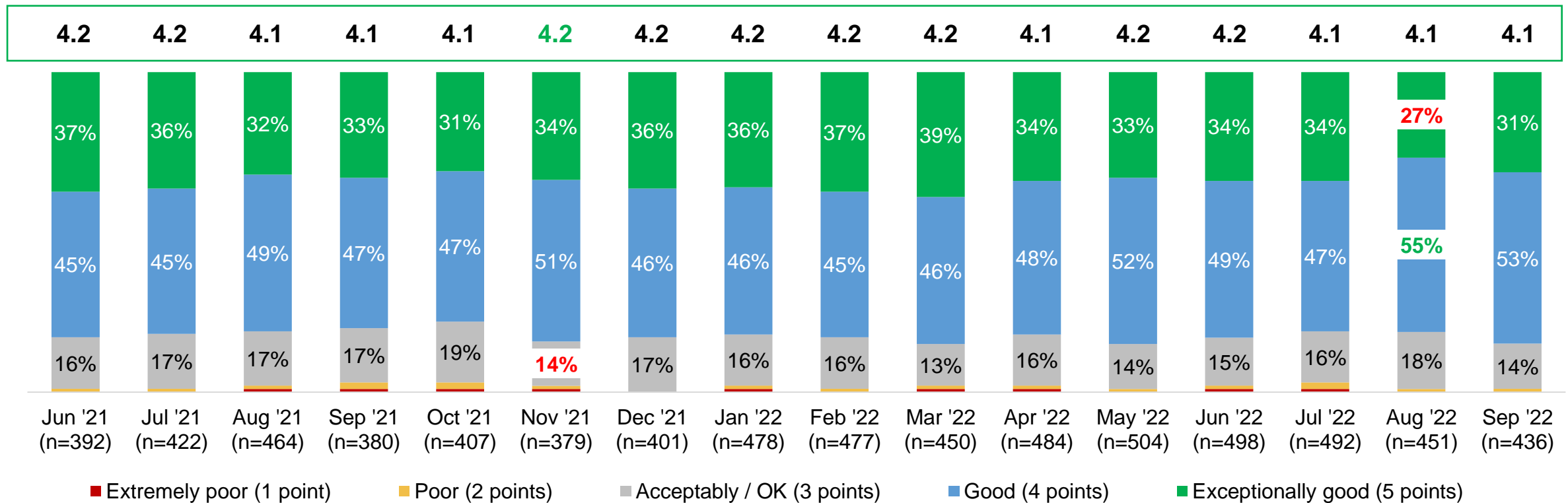
Base: Those who visited a Protected Natural Area in the last month. *Note: Only activities 6% and above for current month displayed. **Caution: Low base size (n<100), results indicative only.

VISIT SATISFACTION

'EXCEPTIONALLY GOOD' RATINGS FOR OVERALL EXPERIENCE AT PROTECTED NATURAL AREAS HAVE RECOVERED FROM AUGUST.

Protected Natural Areas – Overall Experience

Mean Score

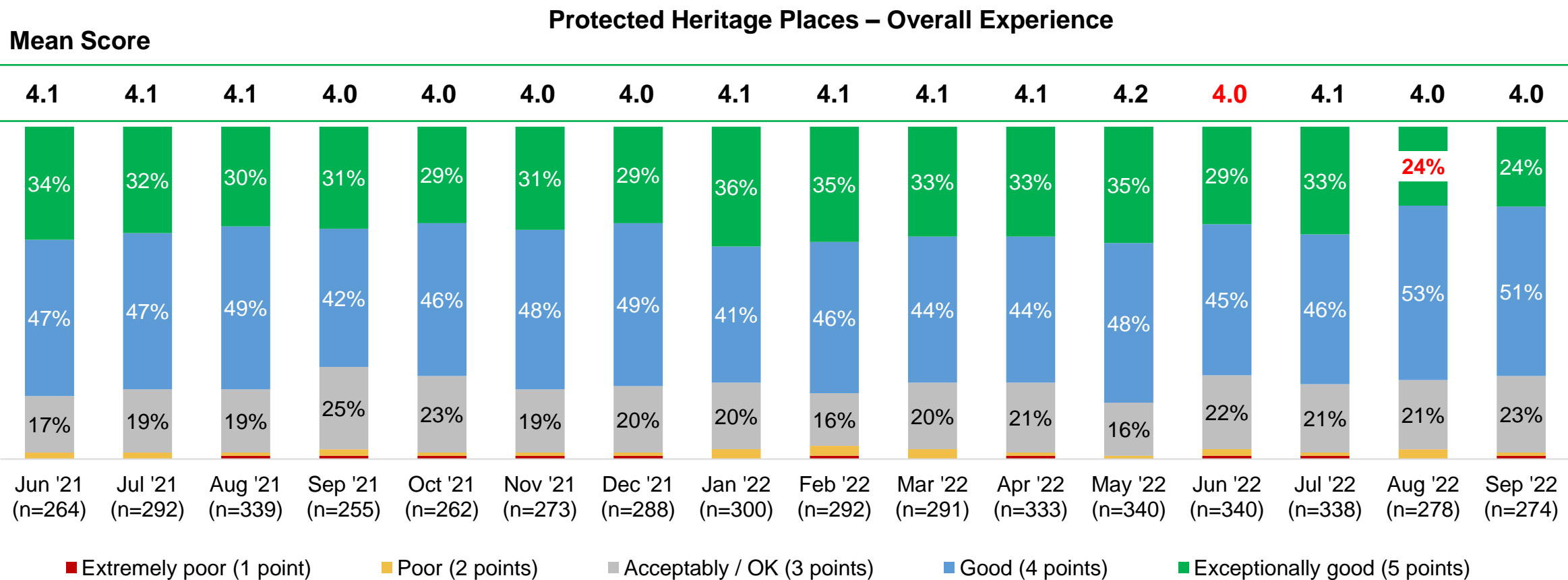


Green / red indicates significantly higher / lower than previous month

Q15: Overall, how would you rate your experience at <LOCATION SELECTED IN Q8>?

Base: Those who visited a Protected Natural Area in the last month

'OVERALL EXPERIENCE' AT PROTECTED HERITAGE PLACES REMAINS HIGH.



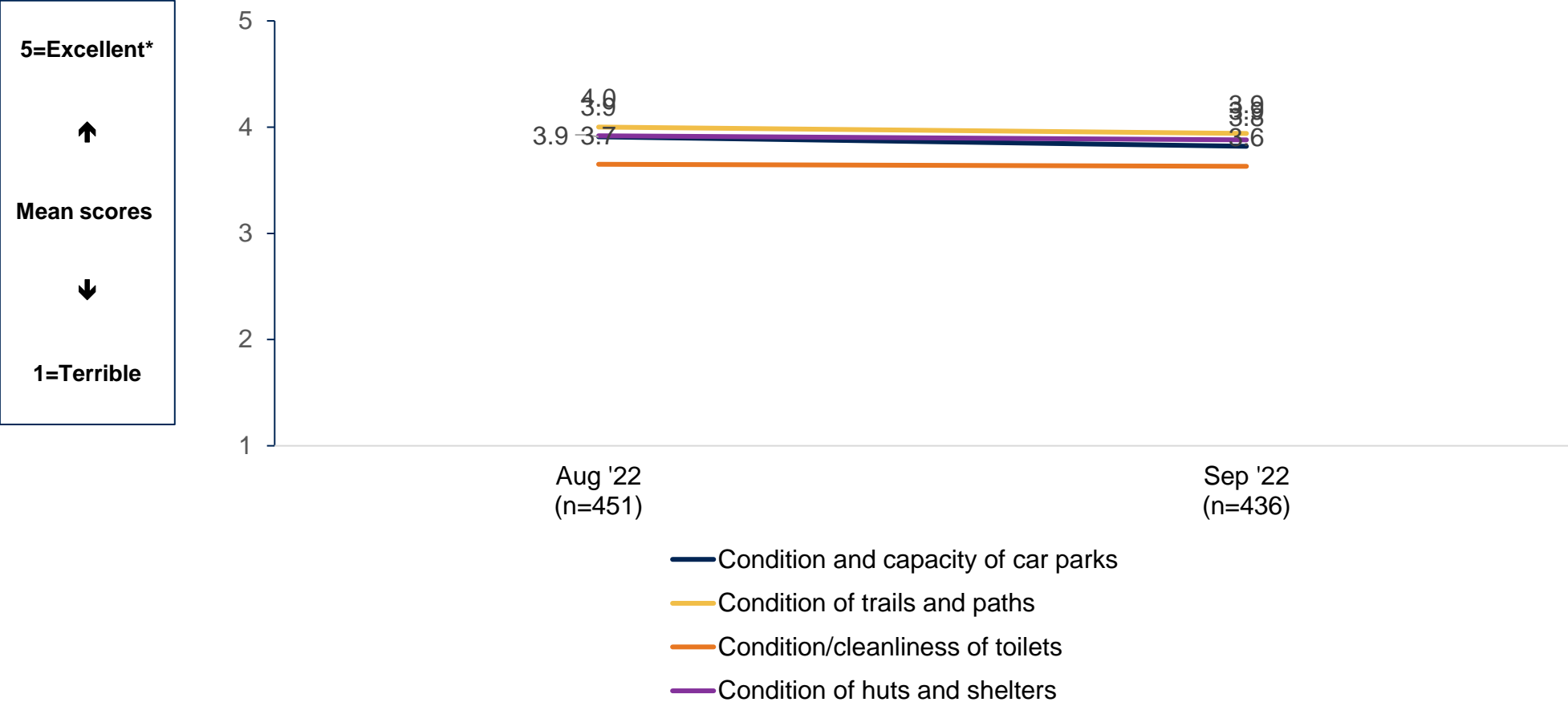
Green / red indicates significantly higher / lower than previous month

Q27: Overall, how would you rate your experience at <LOCATION SELECTED IN Q20>?

Base: Those who visited a Protected Heritage Place in the last month

VISITORS ARE GENERALLY SATISFIED WITH THE CONDITION OF PNA, ALTHOUGH THE *CLEANLINESS OF TOILETS* COULD BE IMPROVED.

Condition of Protected Natural Area Facilities

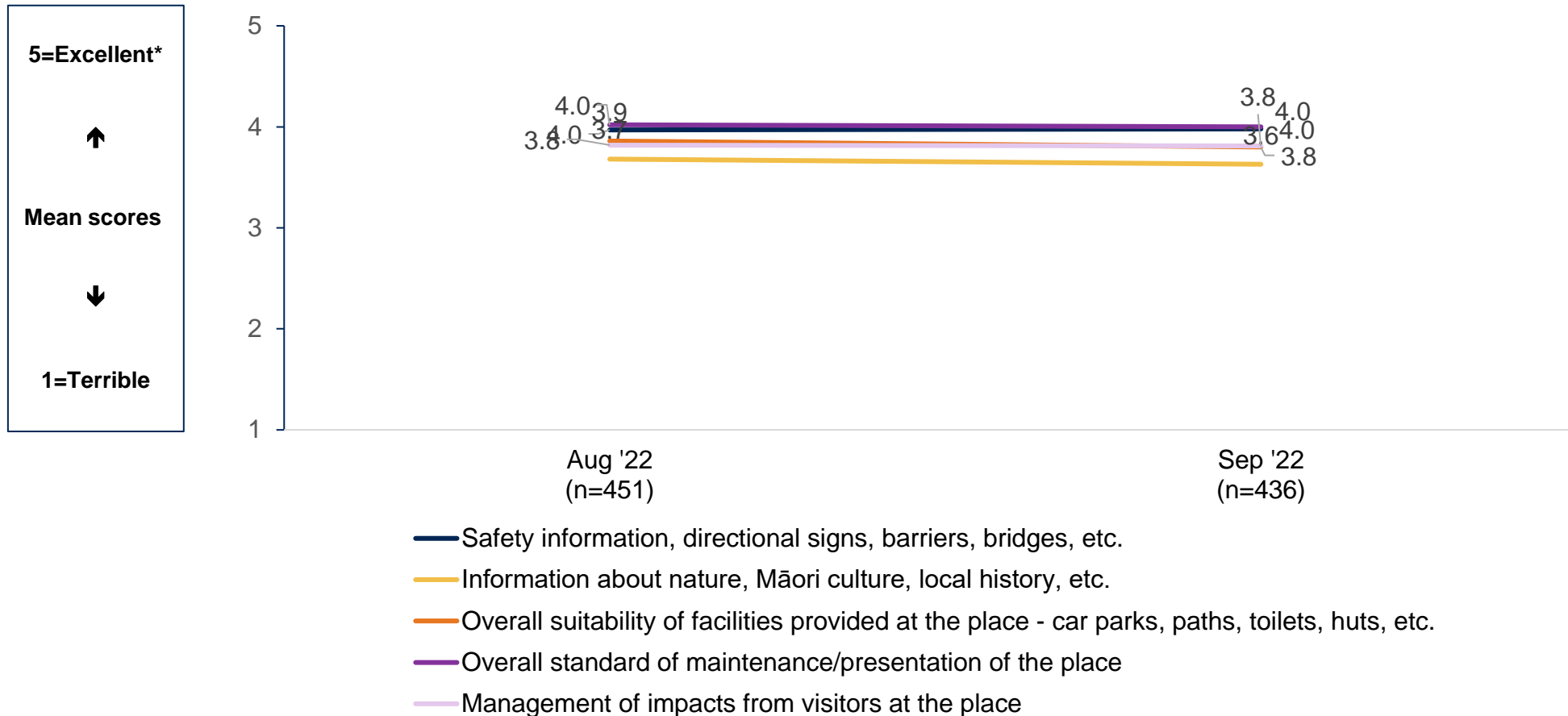


Q14a: Still thinking about your most recent visit to <LOCATION SELECTED IN Q8>, how would you rate the following aspects listed below?

Base: Those who visited a Protected Natural Area in the last month. *Note: The mean score excludes 'Don't know / not applicable' responses. Higher mean scores are desirable.

INFORMATION ABOUT NATURE, MĀORI CULTURE COULD BE IMPROVED AT PROTECTED NATURAL AREAS.

Satisfaction of Protected Natural Areas



Q14a: Still thinking about your most recent visit to <LOCATION SELECTED IN Q8>, how would you rate the following aspects listed below?

Base: Those who visited a Protected Natural Area in the last month. *Note: The mean score excludes 'Don't know / not applicable' responses. Higher mean scores are desirable.

VISITORS TO PROTECTED NATURAL AREAS ARE MOST LIKELY TO AGREE THAT THEIR EXPERIENCE PROVIDED AN *ENJOYABLE LEVEL OF EXERCISE*.

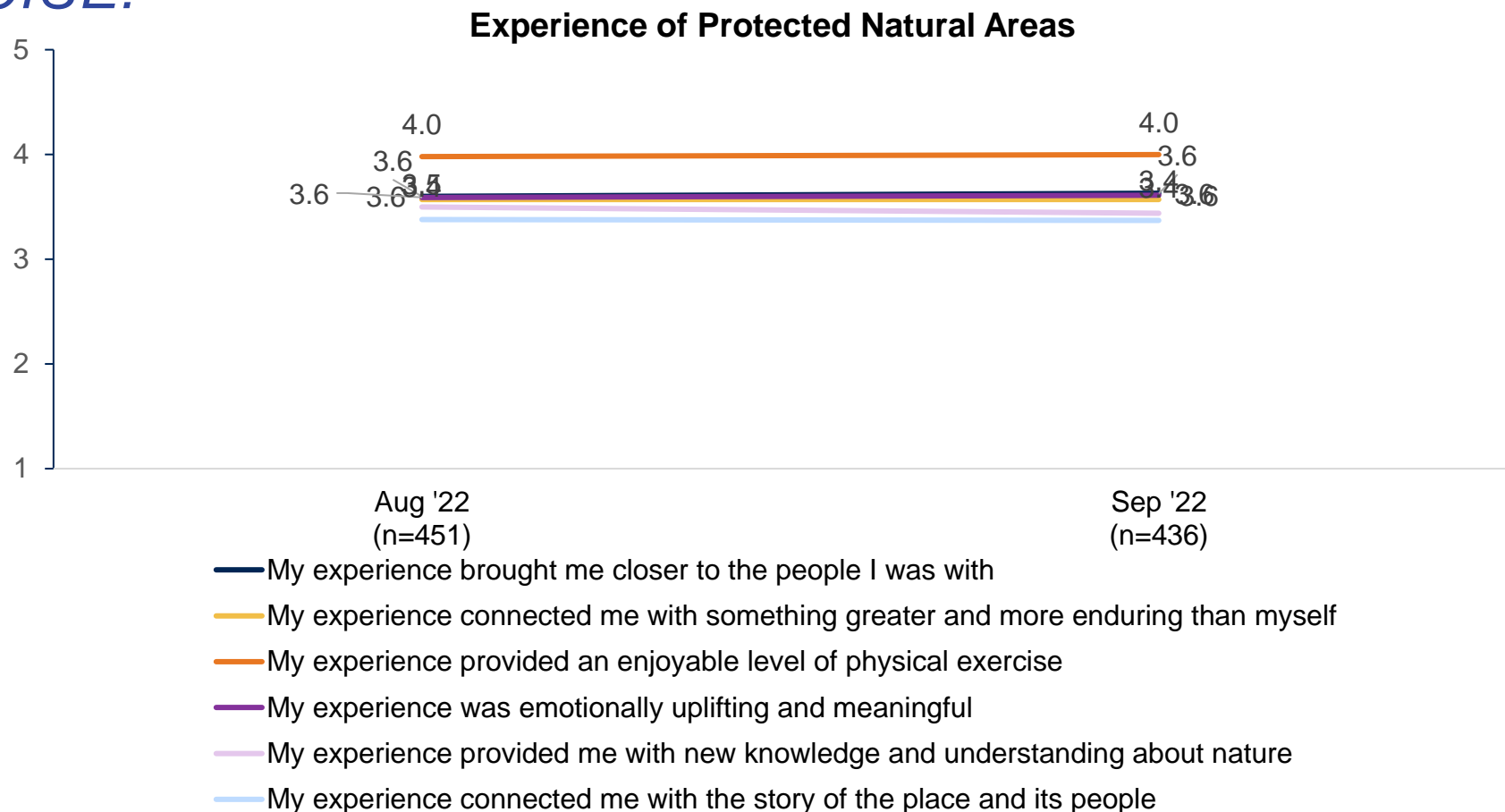
5=Excellent*

↑

Mean scores

↓

1=Terrible



Q14b: Still thinking about your most recent visit to <LOCATION SELECTED IN Q8>, how much do you agree or disagree with each of the statements below?

Base: Those who visited a Protected Natural Area in the last month. ***Note:** Higher mean scores are desirable.

VISITORS TO PROTECTED NATURAL AREAS *WOULD BE VERY HAPPY TO COME BACK.*

5=Excellent*

↑

Mean scores

↓

1=Terrible

Experience of Protected Natural Areas

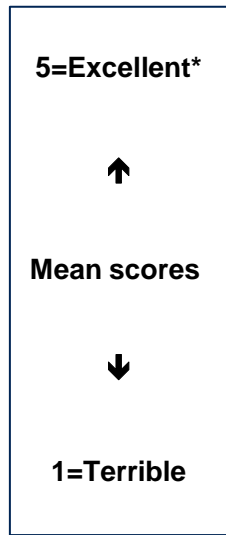


- My experience was one of the best I have ever had in the outdoors
- This place was worth the time, effort and expense invested in visiting
- I would be very happy to visit this place again if the opportunity arose
- This place provided all the benefits I/my group expected from visiting such places
- This place was like many others I have visited in Aotearoa New Zealand

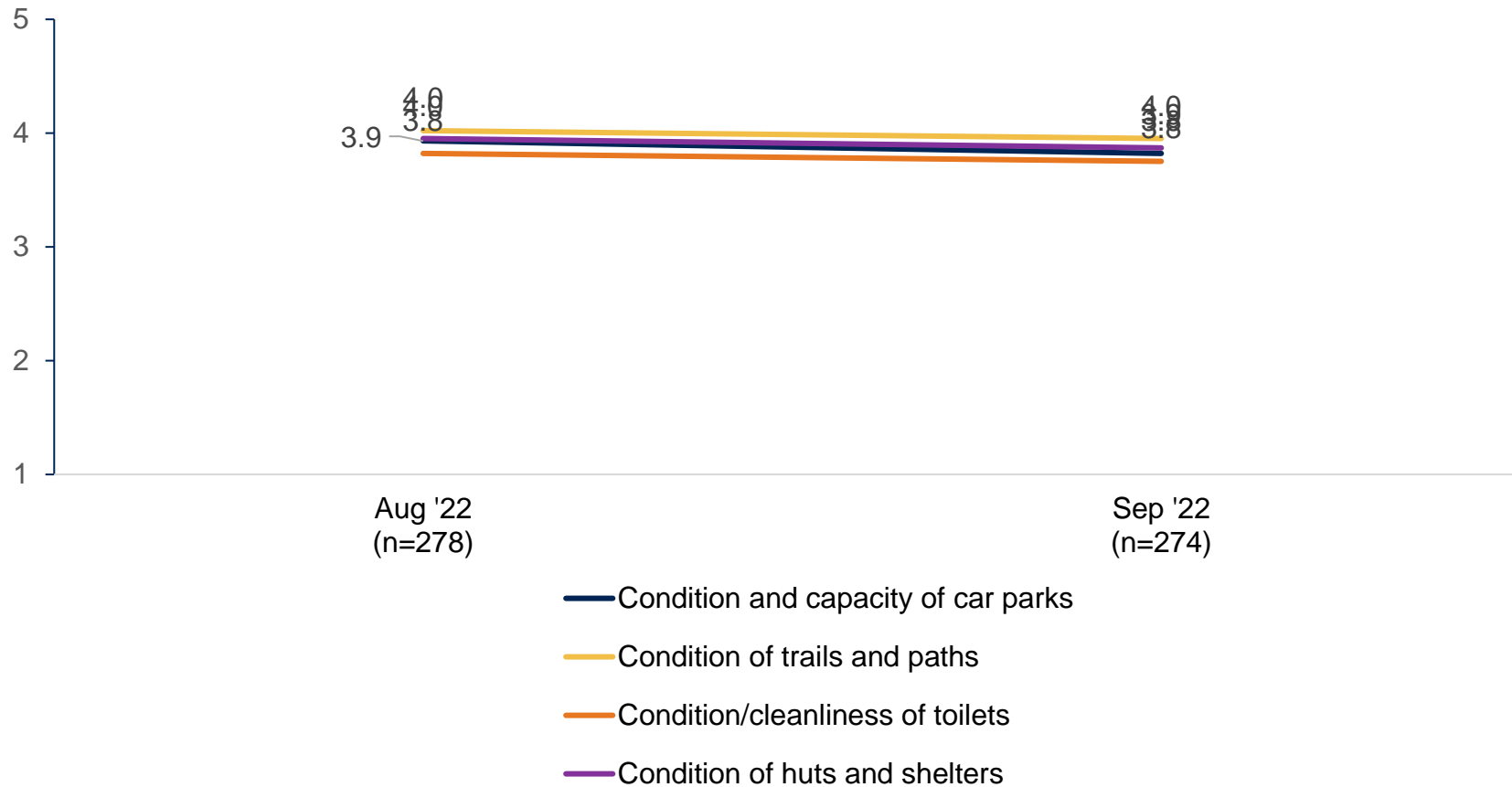
Q14b: Still thinking about your most recent visit to <LOCATION SELECTED IN Q8>, how much do you agree or disagree with each of the statements below?

Base: Those who visited a Protected Natural Area in the last month. *Note: Higher mean scores are desirable.

VISITORS TO PROTECTED HERITAGE PLACES ARE SATISFIED OVERALL.



Condition of Protected Heritage Place Facilities

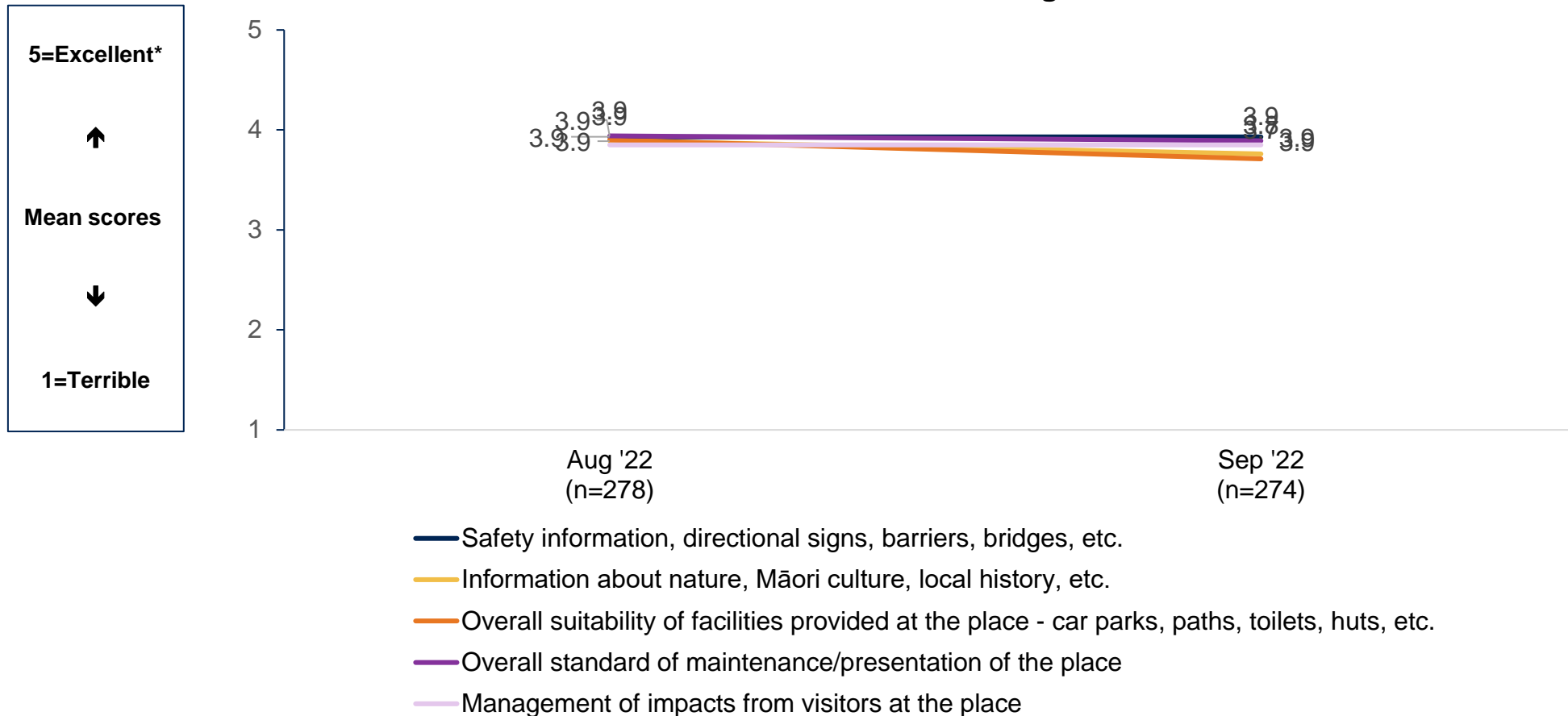


Q26a: Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how would you rate the following aspects listed below?

Base: Those who visited a Protected Heritage Place in the last month. ***Note:** The mean score excludes 'Don't know / not applicable' responses. Higher mean scores are desirable.

SATISFACTION OF OVERALL SUITABILITY OF FACILITIES APPEARS TO HAVE FALLEN SINCE AUGUST BUT THIS IS NOT STATISTICALLY SIGNIFICANT.

Satisfaction of Protected Heritage Place Areas

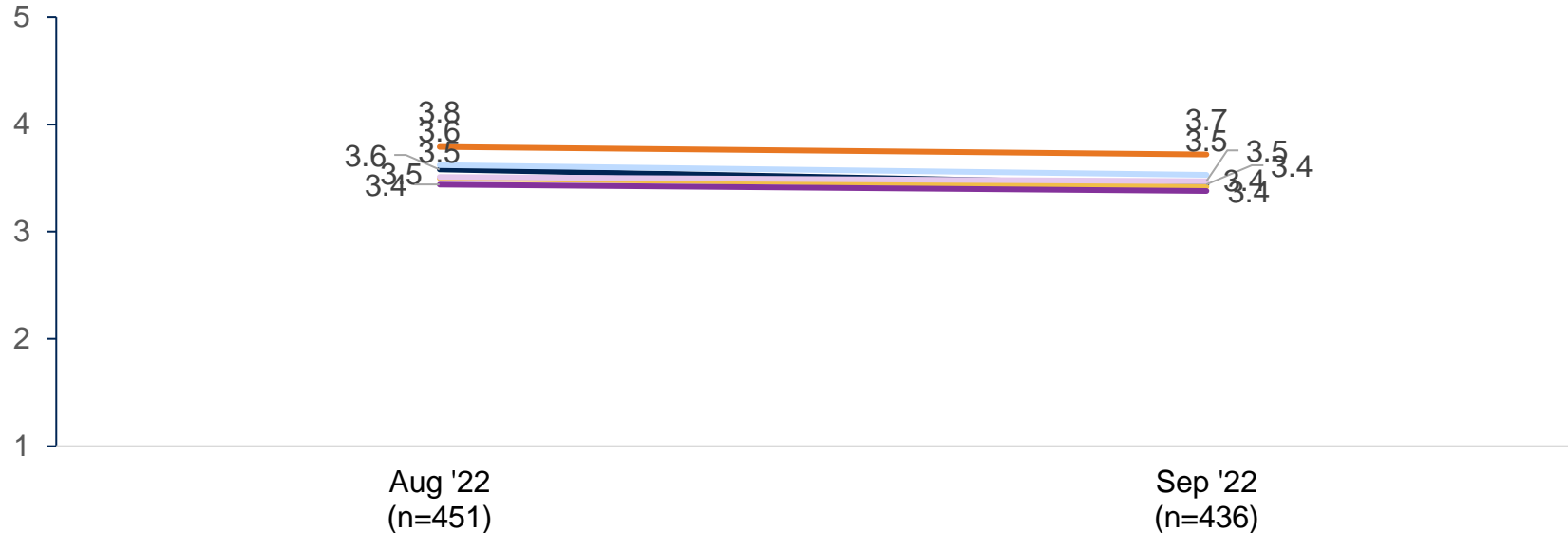
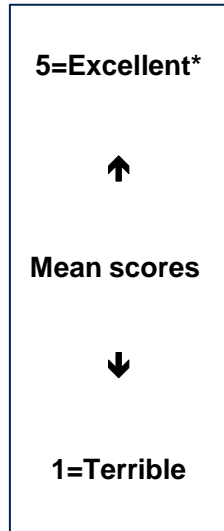


Q26a: Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how would you rate the following aspects listed below?

Base: Those who visited a Protected Heritage Place in the last month. *Note: The mean score excludes 'Don't know / not applicable' responses. Higher mean scores are desirable.

MOST VISITORS ARE POSITIVE ABOUT THEIR MOST RECENT EXPERIENCE AT A PROTECTED HERITAGE PLACE.

Experience of Protected Heritage Places



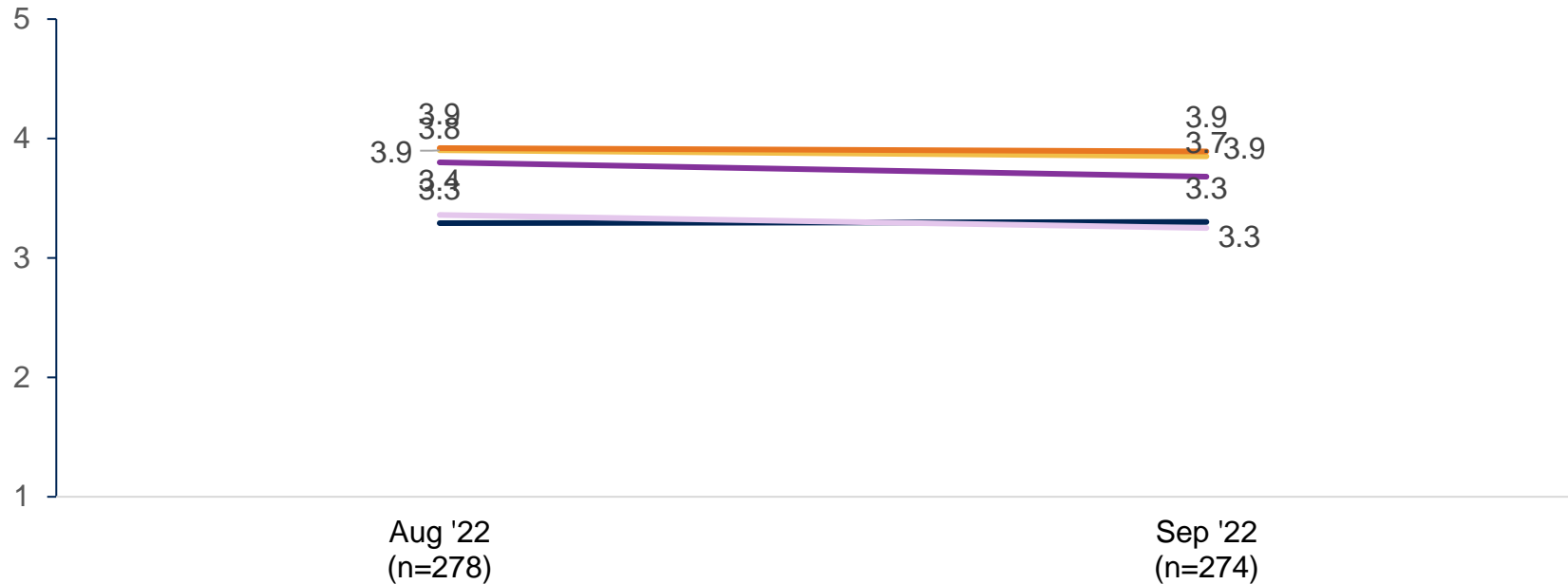
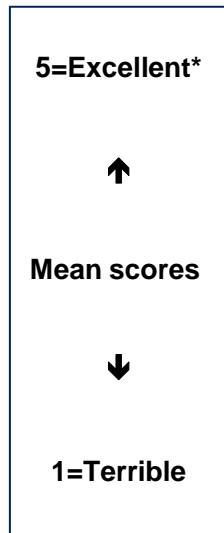
- My experience brought me closer to the people I was with
- My experience connected me with something greater and more enduring than myself
- My experience provided an enjoyable level of physical exercise
- My experience was emotionally uplifting and meaningful
- My experience provided me with new knowledge and understanding about nature
- My experience connected me with the story of the place and its people

Q26b: Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how much do you agree or disagree with each of the statements below?

Base: Those who visited a Protected Heritage Place in the last month. ***Note:** Higher mean scores are desirable.

MOST VISITORS AGREE THEY WOULD BE HAPPY TO VISIT THE PHP AGAIN IF THE OPPORTUNITY AROSE.

Experience of Protected Heritage Places



- My experience was one of the best I have ever had at a historical place
- This place was worth the time, effort and expense invested in visiting
- I would be very happy to visit this place again if the opportunity arose
- This place provided all the benefits I/my group expected from visiting such places
- This place was like many others I have visited in Aotearoa New Zealand

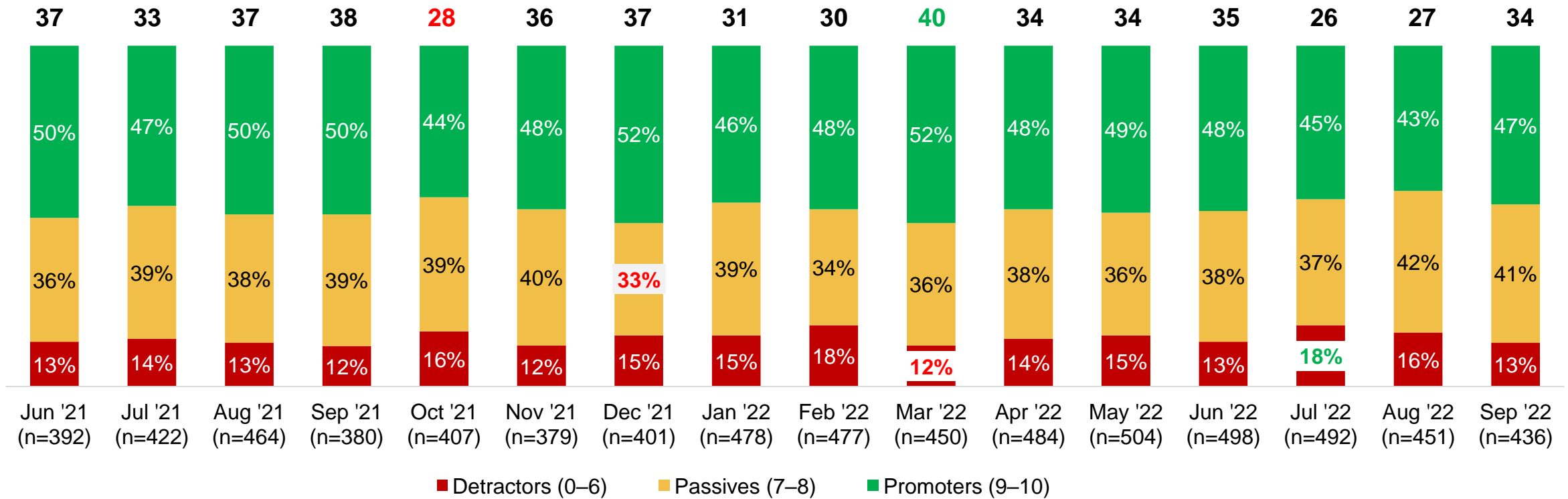
Q26b: Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how much do you agree or disagree with each of the statements below?

Base: Those who visited a Protected Heritage Place in the last month. ***Note:** Higher mean scores are desirable.

NPS

PROTECTED NATURAL AREAS' NPS HAS RECOVERED TO THE LEVEL SEEN IN THE SECOND QUARTER OF 2022.

Protected Natural Areas – NPS



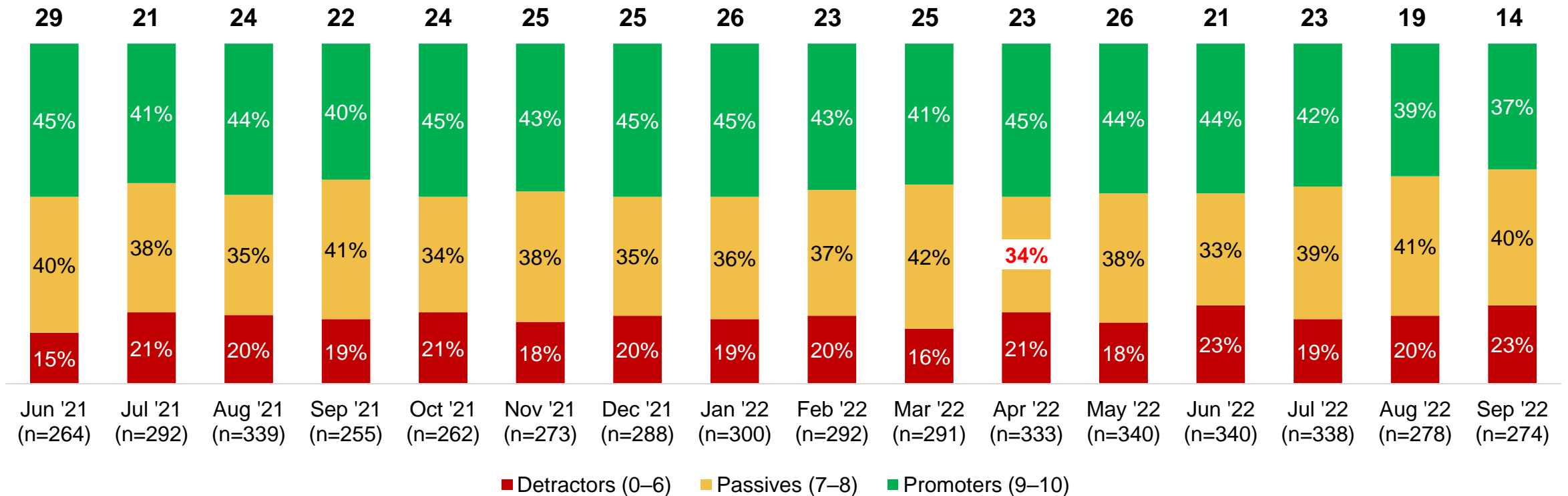
Green / red indicates significantly higher / lower than previous month

Q16: How LIKELY is it you would RECOMMEND <LOCATION SELECTED IN Q8> to your family or friends?

Base: Those who visited a Protected Natural Area in the last month

PROTECTED HERITAGE PLACES' NPS HAS CONTINUED TO DECREASE, NOW AT ITS LOWEST LEVEL SINCE TRACKING BEGAN.

Protected Heritage Places – NPS



Green / red indicates significantly higher / lower than previous month

Q28: How LIKELY is it you would RECOMMEND <LOCATION SELECTED IN Q20> to your family or friends?

Base: Those who visited a Protected Heritage Place in the last month

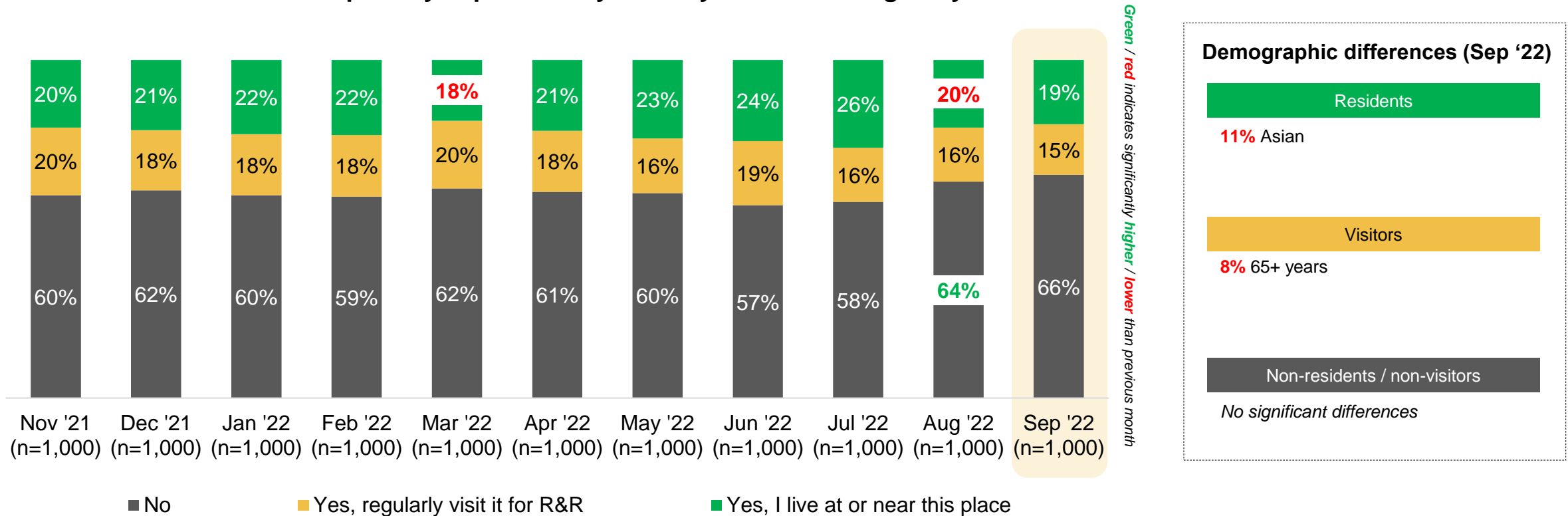
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‘THRIVE’ MODULE

2 IN 3 NEW ZEALANDERS DO NOT LIVE AT OR REGULARLY VISIT A PNA OF PERSONAL IMPORTANCE TO THEM.

Is there a Protected Natural Area in New Zealand that is especially important to you that you live at or regularly visit?

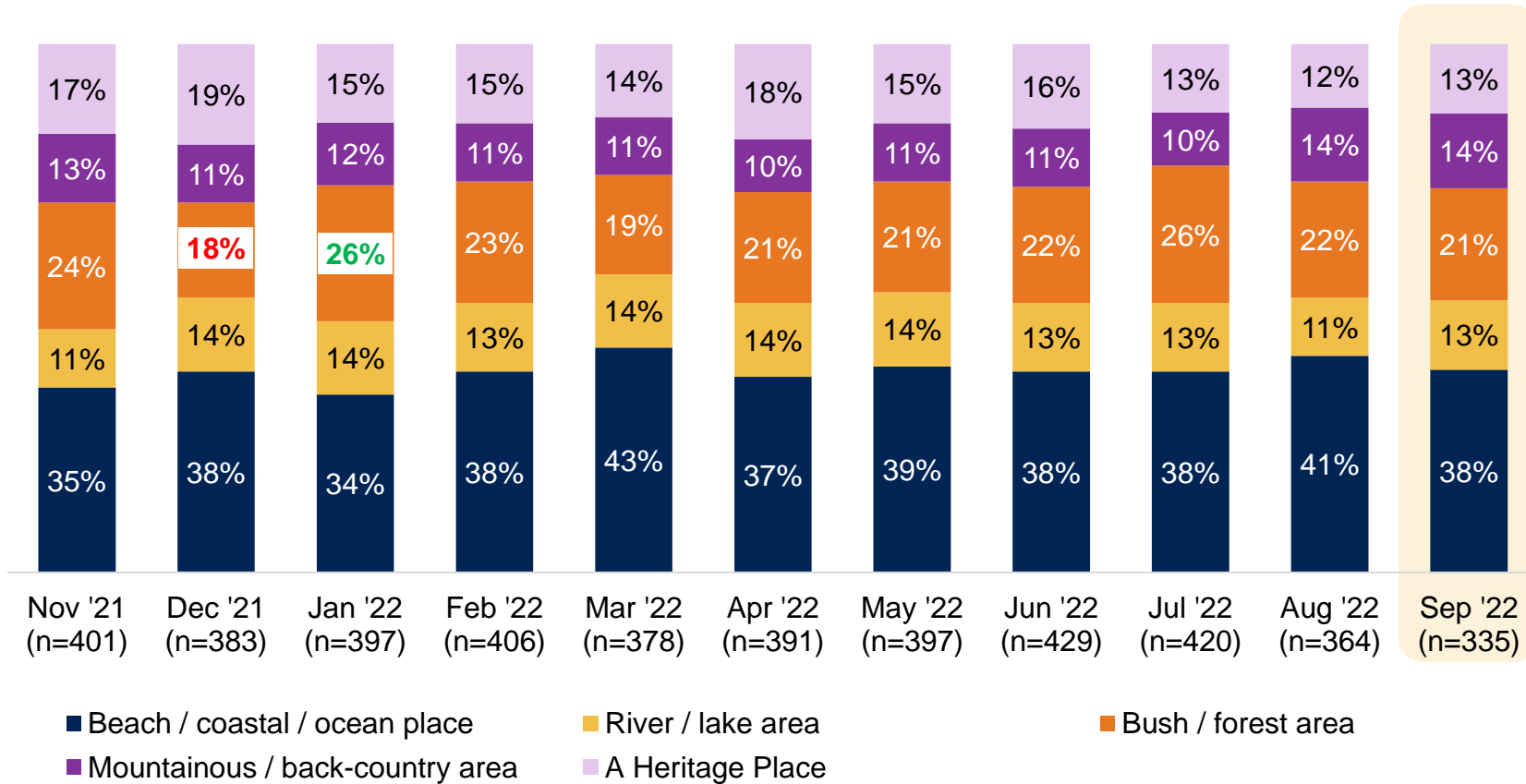


Q40: Is there a Protected Natural Area in New Zealand that is especially important to you? If there is more than one such place, please think about the place that is the MOST important to you.

Base: Total sample

HALF OF THE PLACES IMPORTANT TO PEOPLE ARE CLOSE TO THE WATER.

Which of the following best describes the location of this place?



Green / red indicates significantly higher / lower than previous month

Demographic profile (total n=4,301)

- Beach / coastal area**
 - 46% Auckland
 - 42% 50–64 years
 - 30% Māori
 - 24% Waikato
- River / lake area**
 - 20% Waikato
 - 19% Bay of Plenty
 - 17% Canterbury
 - 15% 18-34 years
 - 8% Auckland
- Bush / forest**
 - 31% Wellington
 - 31% Waikato
 - 19% Auckland
 - 17% Asian
- Mountainous / back-country area**
 - 17% Otago
 - 15% Canterbury
 - 14% 18–34 years
 - 9% Auckland
 - 9% 65+ years
 - 8% Bay of Plenty
- Protected Heritage Place**
 - 25% Māori
 - 13% European
 - 11% Wellington
 - 9% Otago

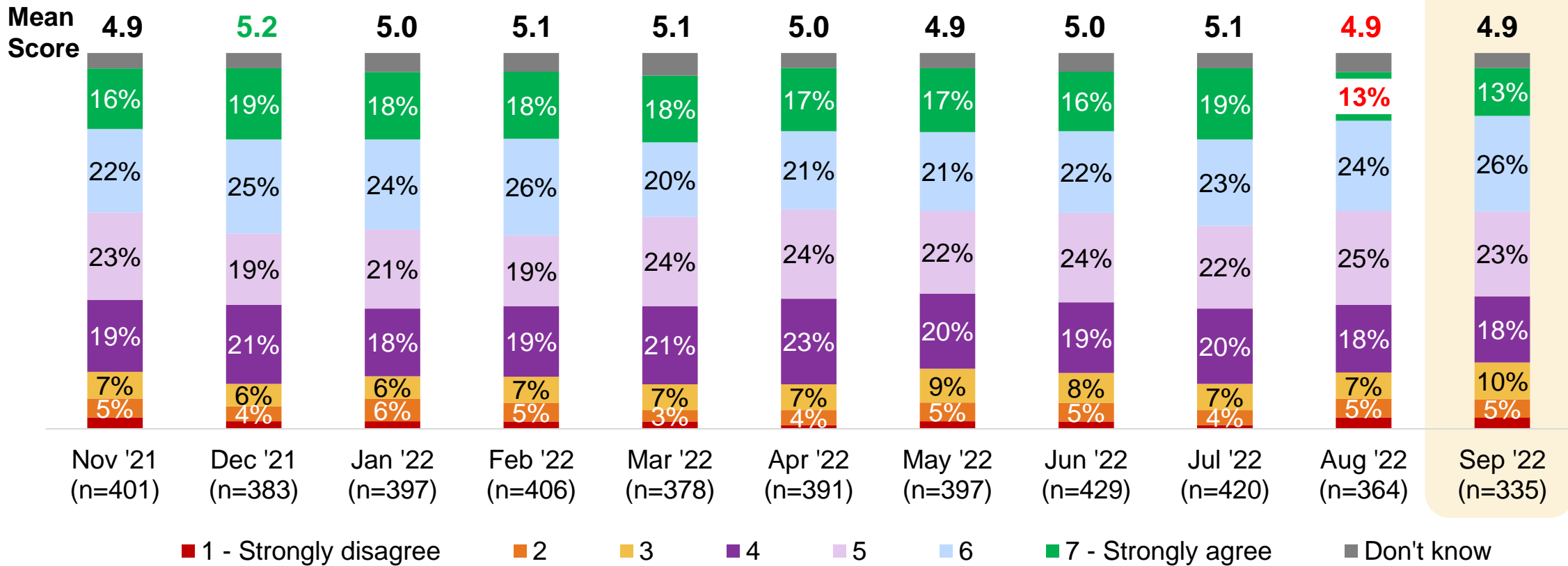
Green / red (demographics) indicates significantly higher / lower than total

Q41: Which of the following best describes the location of this place?

Base: Those who live near or regularly visit this place

PEOPLE ARE LESS LIKELY TO FEEL THAT VISITORS ENABLE LOCAL STORIES, IDENTITIES & TRADITIONS TO BE SHARED.

“Visitors to this Protected Natural Area enable stories, identities and traditions to be shared between visitors and local people”



Green / red indicates significantly higher / lower than previous month

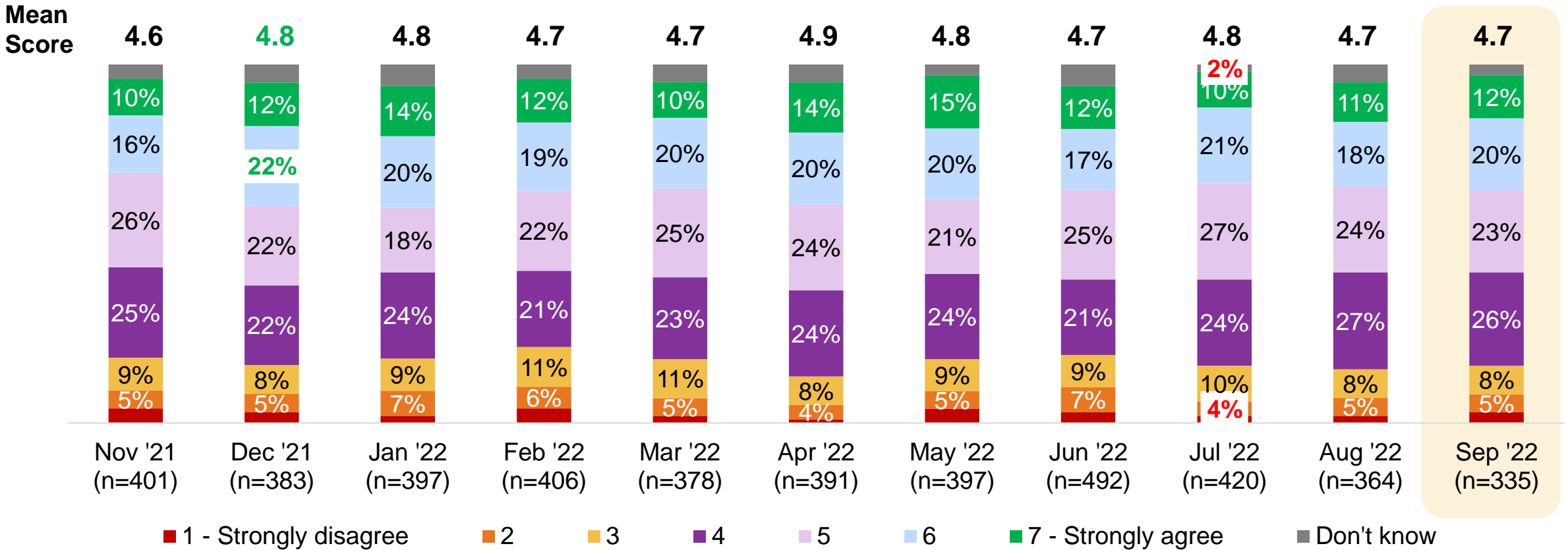
Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place

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WIDE AGREEMENT THAT VISITORS IMPROVE THE QUALITY OF LIFE OF THE LOCAL COMMUNITIES REMAINS.

“Visitors to this Protected Natural Area improve the quality of life of the local communities”



Green / red indicates significantly higher / lower than previous month

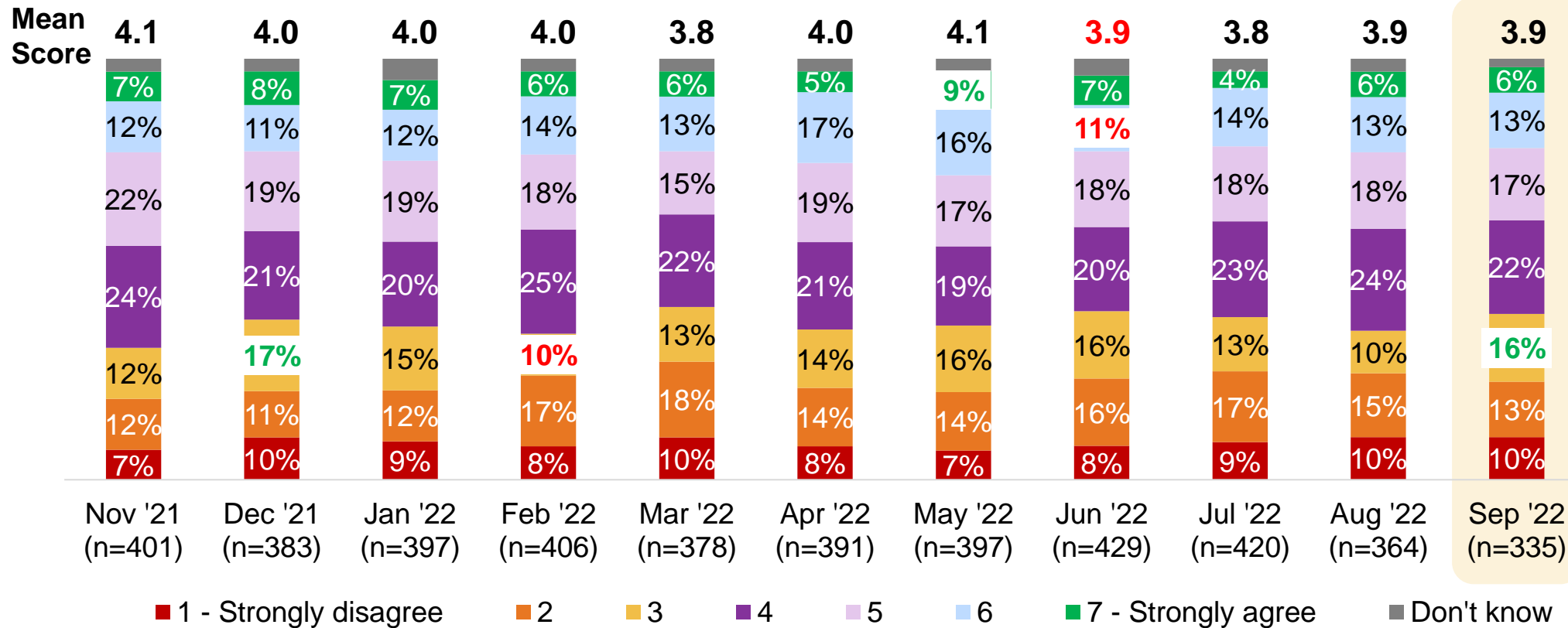
Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place

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THE PERCEIVED INCIDENCE OF VISITOR-CREATED DAMAGE TO THE AREA REMAINS STABLE THIS MONTH.

“This Protected Natural Area is damaged by the activities resulting from these visitors”



Mean score demographic differences (Sep)*
65+ years** (3.3)

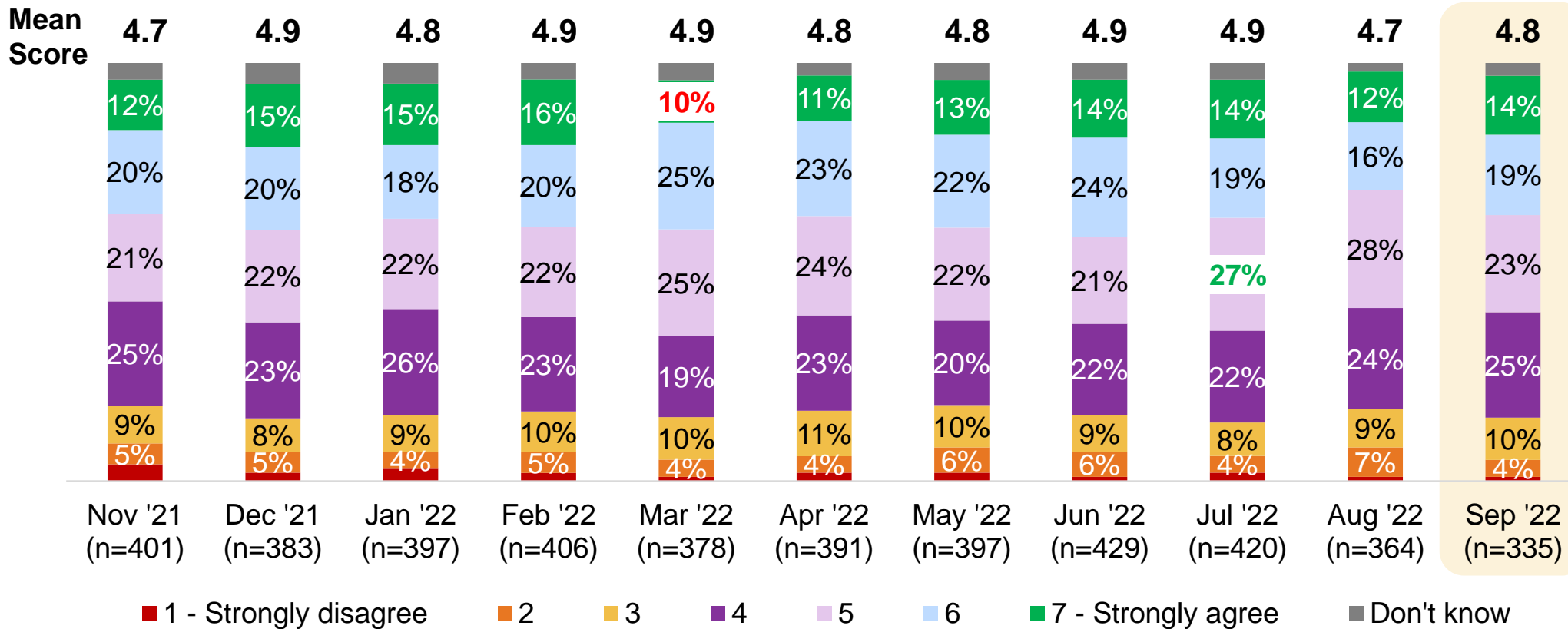
Green / red indicates significantly higher / lower than previous month

Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place. *Note: Significant differences versus total. **Caution: Low base size (n<100), results indicative only.

THE MAJORITY BELIEVE VISITORS' TO PNA HELP ENSURE AREAS ARE PROTECTED & IMPROVED.

“Visitors to this Protected Natural Area help ensure the areas they visit are protected and improved”



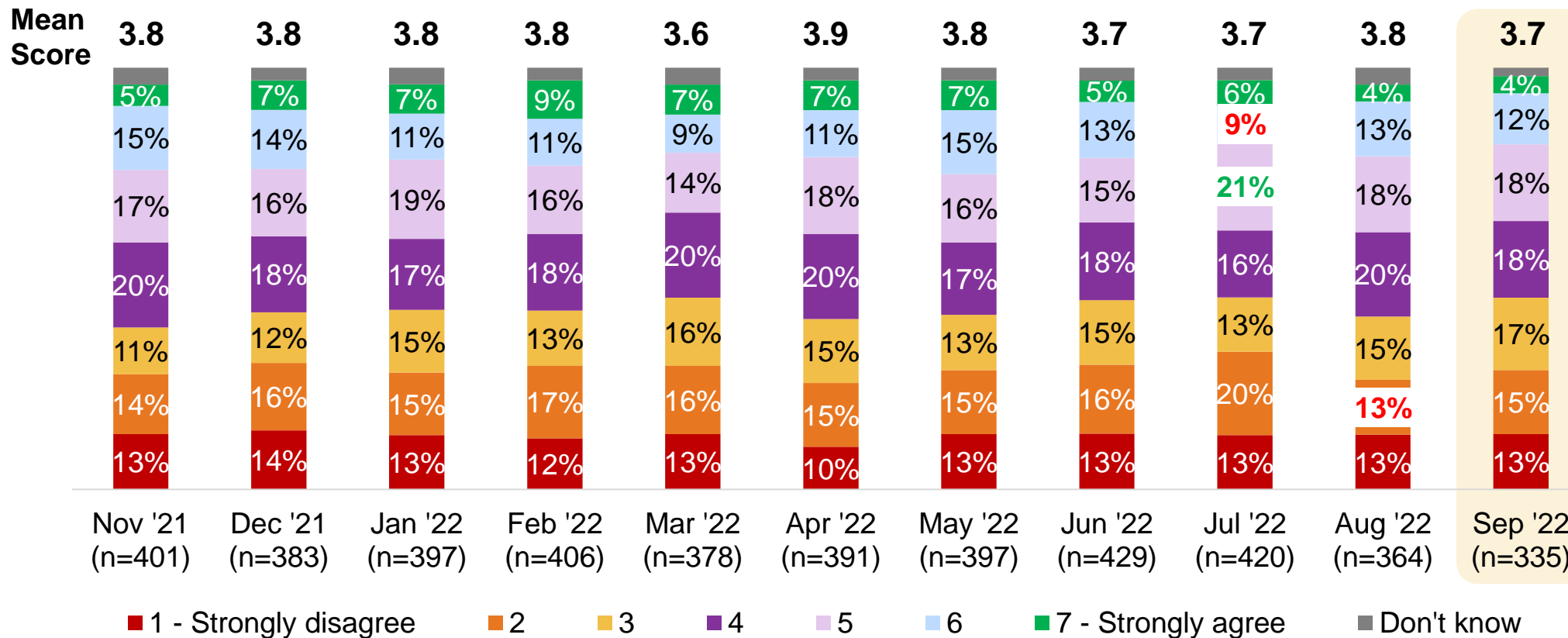
Green / red indicates significantly higher / lower than previous month

Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place. *Note: Significant differences versus total. **Caution: Low base size (n<100), results indicative only.

PERCEPTIONS OF VISITORS AFFECTING THE ATTRACTIVENESS OF THE PROTECTED NATURAL AREA VARY WIDELY, BUT ARE SLIGHTLY MORE NEGATIVE.

“Visitors to this Protected Natural Area make it less attractive for local people to visit it”



Mean score demographic differences (Sep)*

- 18–34 years (4.2)
- 50-64 years** (3.1)
- 65+ years** (2.9)

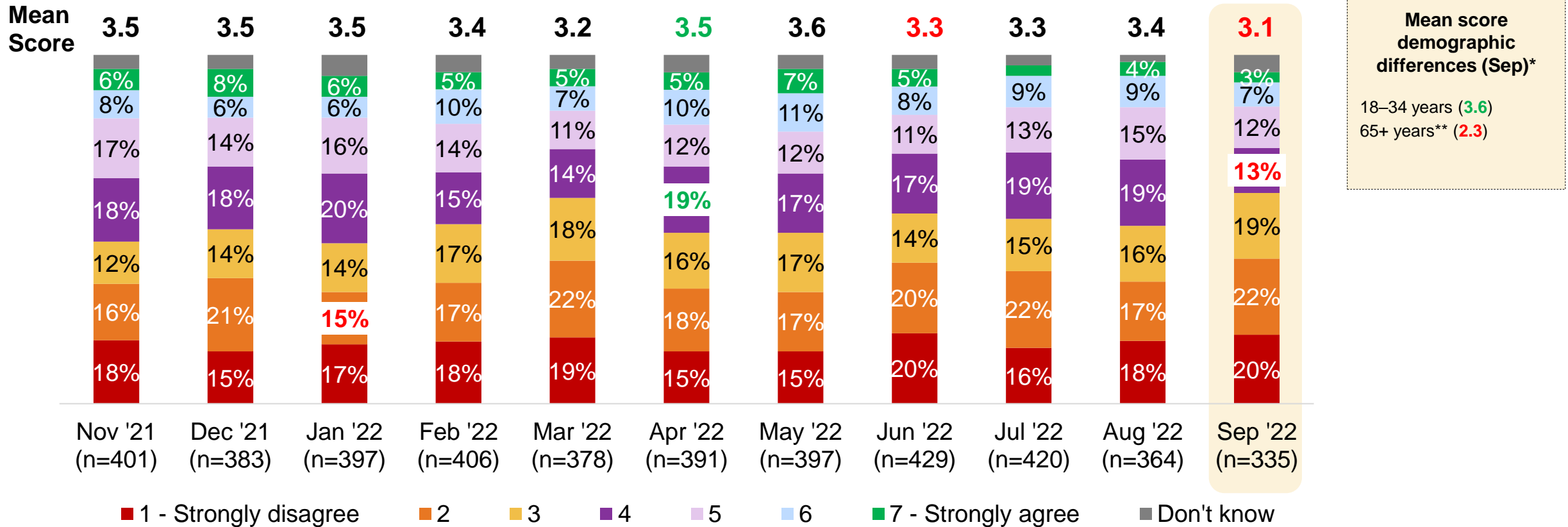
Green / red indicates significantly higher / lower than previous month

Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place. *Note: Significant differences versus total. **Caution: Low base size (n<100), results indicative only.

MOST DISAGREE THAT VISITORS WEAKEN LOCAL TRADITIONS & CULTURES.

“Visitors to this Protected Natural Area weaken the local communities’ traditions and cultures”

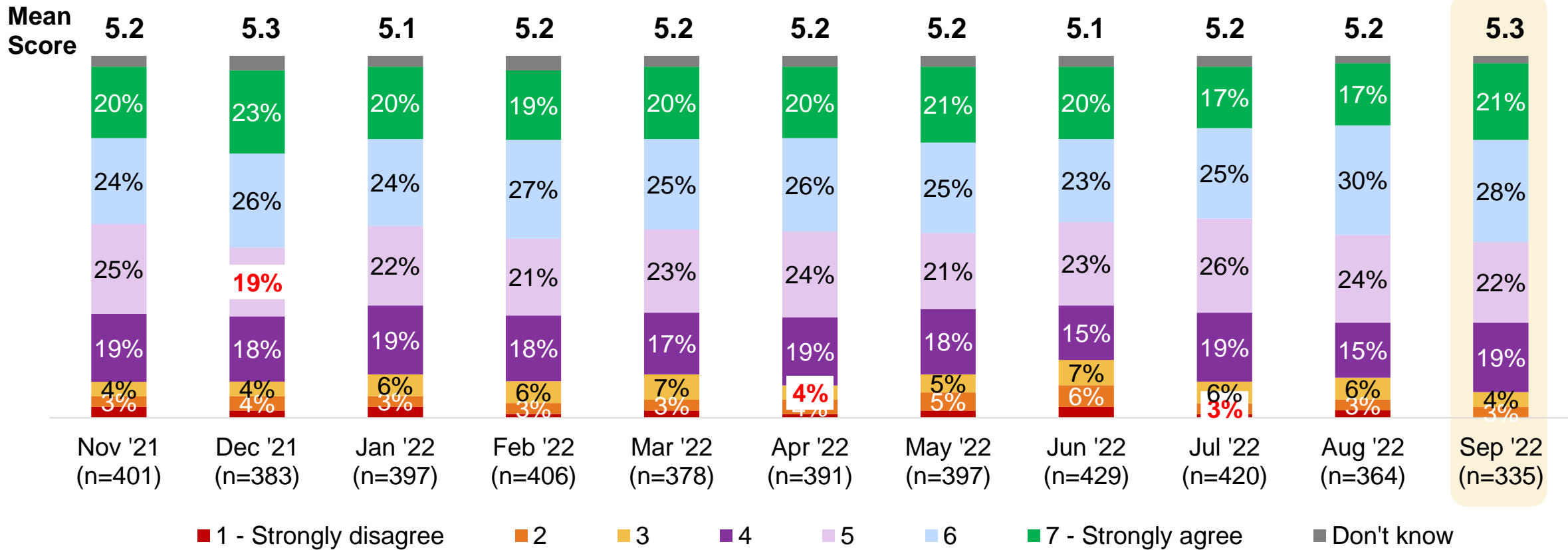


Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place *Note: Significant differences versus total. **Caution: Low base size (n<100), results indicative only.

MOST AGREE THAT VISITORS IMPROVE THE LOCAL ECONOMY.

“Visitors to this Protected Natural Area improve the local economy”



Green / red indicates significantly higher / lower than previous month

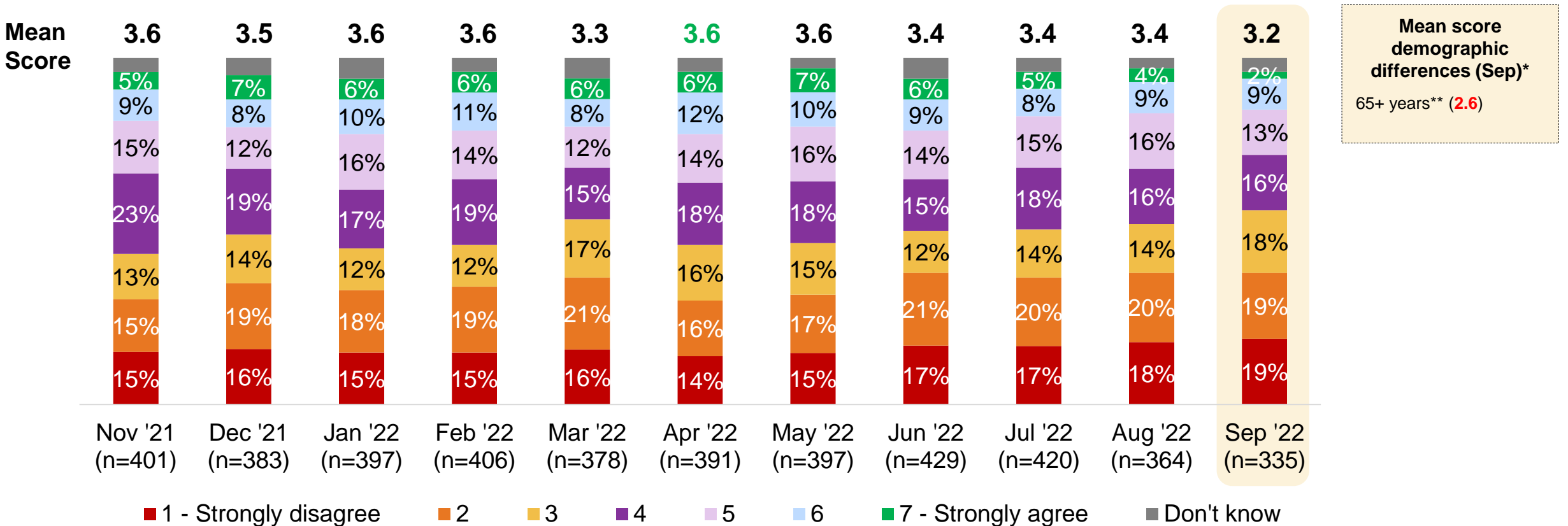
Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place

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MOST DISAGREE THAT VISITORS ADD UNWANTED FINANCIAL BURDENS TO LOCAL COMMUNITIES.






“Visitors to this Protected Natural Area add unwanted financial burdens onto the local communities”



Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place. *Note: Significant differences versus total. **Caution: Low base size (n<100), results indicative only.

PEOPLE ARE MORE LIKELY TO SEE NEGATIVE EFFECTS FOR *RIVER / LAKE* COMMUNITIES, WHILE *BUSH / FOREST* COMMUNITIES TEND TO BE MORE NEUTRAL.

		Mean*						
								
		n=	Total	Beach / Coast	River / Lakes	Bush / Forest	Back-Country	Heritage Place
			4,301	1,640	554	954	498	655
Positive Effects	Visitors to this Protected Natural Area improve the local economy	5.2	5.3	5.3	5.0	5.2	5.1	
	Visitors to this Protected Natural Area enable stories, identities & traditions to be shared between visitors & local people	5.0	4.9	5.1	4.8	5.1	5.3	
	Visitors to this Protected Natural Area help ensure the areas they visit are protected & improved	4.8	4.8	4.9	4.8	4.7	5.0	
	Visitors to this Protected Natural Area improve the quality of life of the local communities	4.7	4.7	4.9	4.6	4.8	4.8	
	AVERAGE AGREEMENT WITH POSITIVE STATEMENTS (higher numbers are better)	4.9	4.9	5.1	4.8	5.0	5.1	
Negative Effects	This Protected Natural Area is damaged by the activities resulting from these visitors	4.0	4.0	4.2	3.7	4.1	3.8	
	Visitors to this Protected Natural Area make it less attractive for local people to visit the Protected Natural Area	3.8	3.8	4.1	3.4	3.9	3.6	
	Visitors to this Protected Natural Area add unwanted financial burdens onto the local communities	3.5	3.5	3.9	3.2	3.6	3.5	
	Visitors to this Protected Natural Area weaken the local communities' traditions & cultures	3.4	3.4	3.8	3.1	3.4	3.4	
	AVERAGE AGREEMENT WITH NEGATIVE STATEMENTS (lower numbers are better)	3.7	3.7	4.0	3.4	3.8	3.6	

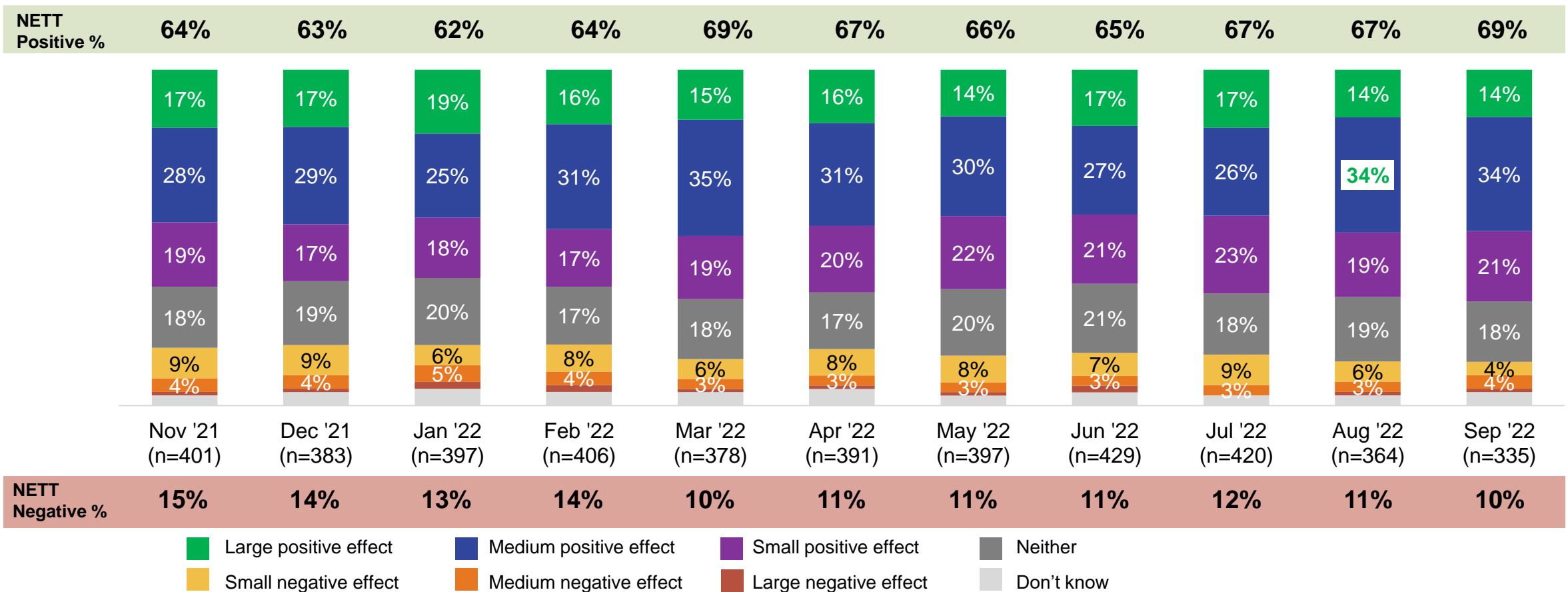
Green / red indicates significantly higher / lower than total

Q42: How much do you agree or disagree with each of the following statements?

Base: Total sample of those who live near or regularly visit this place. *Note: Mean score based on a scale of 1 – Strongly Disagree to 7 – Strongly Agree. “Don’t know” responses are excluded.

THE MAJORITY OF RESIDENTS & VISITORS TO THESE PLACES BELIEVE THE EFFECT OF VISITORS IS POSITIVE.

The effect of visitors on this area



Q43: Overall, what effect do you think visitors to this Protected Natural Area have on the local people who live at or near to it, at this time of year?

Base: Those who live near or regularly visit this place. *Note: Significant differences versus total. **Caution: Low base size (n<100), results indicative only.

CONTACT

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ABOUT IPSOS

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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GAME CHANGERS

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:
You act better when you are sure.



**THANK
YOU**

GAME CHANGERS

