

DOC PUBLIC PULSE OF CONSERVATION

Monthly Topline Report – January 2023

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23 January, 2023



GAME CHANGERS



KEY FINDINGS – JANUARY ‘23

- Visits to Protected Natural Areas have increased in the last month. This is as expected with the warmer weather and holiday period. Compared to a year ago, visitation levels remain similar with no significant change.
- There has been a significant increase in the number of people recalling *Great Walks*, *safety in the outdoors* and *outdoor recreation in general* when it comes to the top aspects of the Department of Conservation that people have seen/heard/read in the last 4 weeks.
- Overall, visitor satisfaction of the *standard of maintenance/presentation* of Protected Natural Areas has decreased this month. Visitors have rated the *condition of trails and paths* lower in the past month so this could play a role in this trend.
- Protected Heritage Places’ (PHP) NPS has increased following a significant decrease last month. Despite the shift however, the number of Detractors remains similar to last month. Focus could be placed on improving *overall maintenance including facilities* and *signage* to reduce detractor experiences and raise PHP NPS to a higher overall level. Such factors were rated significantly high in November and this coincided with a significantly high PHP NPS.
- Protected Natural Areas NPS has seen a reduction in the number of Detractors and hence the score has increased compared to last month. This sits at a level seen a year ago.
- Fewer people agree that their ‘special’ Protected Natural Area suffers from *visitor-created damage*. This is the lowest sentiment for visitor-created damage has been since July 2022.



SUMMARY


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

BACKGROUND & METHODOLOGY



Sample size

1,000




Fieldwork dates
January 9-17, 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

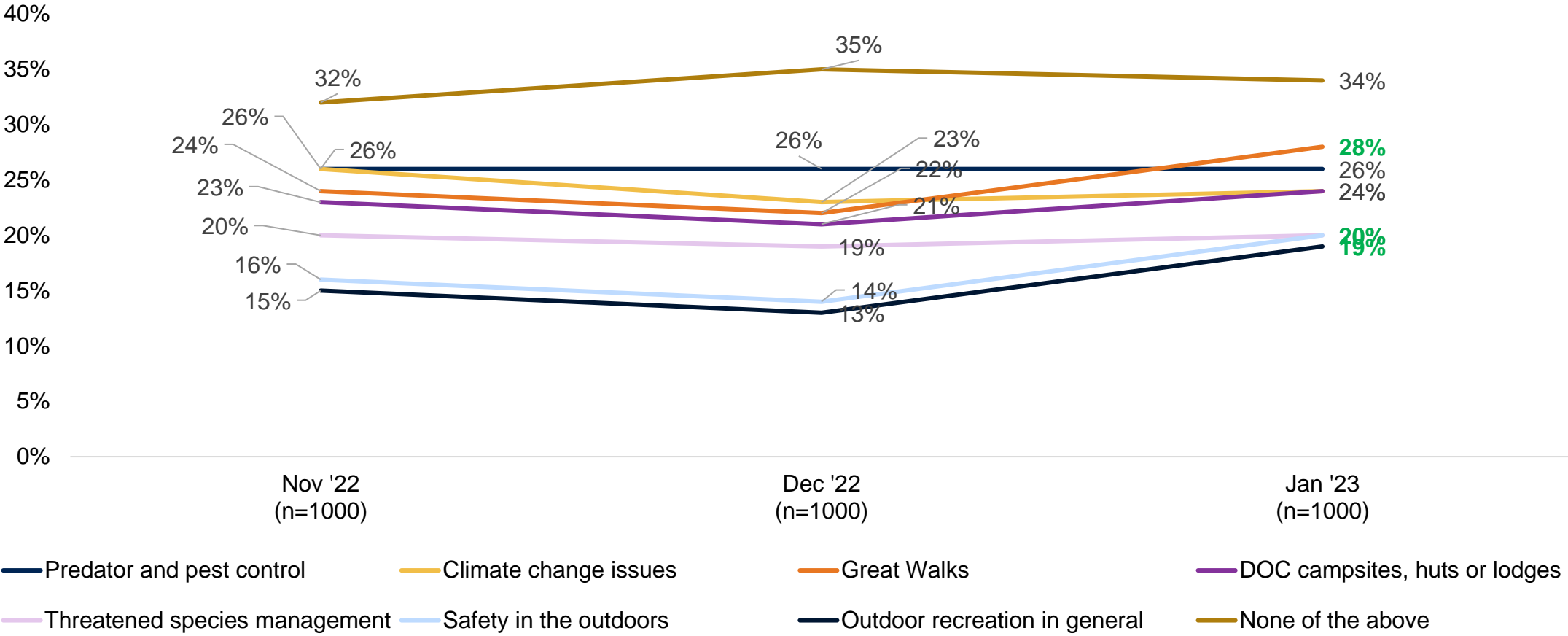
Jul 21	6–12 July, 2021
Aug 21	2–6 August, 2021
Sep 21	3–9 September, 2021
Oct 21	1–7 October, 2021
Nov 21	5–12 November, 2021
Dec 21	3–9 December, 2021
Jan 22	6–15 January, 2022
Feb 22	5–15 February, 2022
Mar 22	3–10 March, 2022
Apr 22	1–11 April, 2022
May 22	5–16 May, 2022
Jun 22	3–11 June, 2022
Jul 22	4–13 July, 2022
Aug 22	15-24 August, 2022
Sep 22	7-17 September, 2022
Oct 22	5-17 October, 2022
Nov 22	7-21 November, 2022
Dec 22	5-19 December, 2022

DOC MEDIA PROFILE



There are significant increases this month in people recalling DOC content regarding the *Great Walks*, *safety in the outdoors* and *outdoor recreation in general*.

Top 7 Aspects of the Department of Conservation seen / read / heard about in the past 4 weeks*



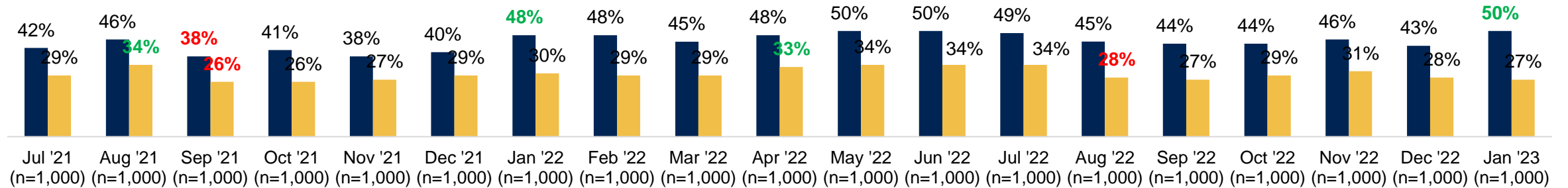
Q50: Which, if any, of the following aspects of the Department of Conservation have you seen, read, or heard about in the past 4 weeks? *Note: Responses less than 15% are excluded



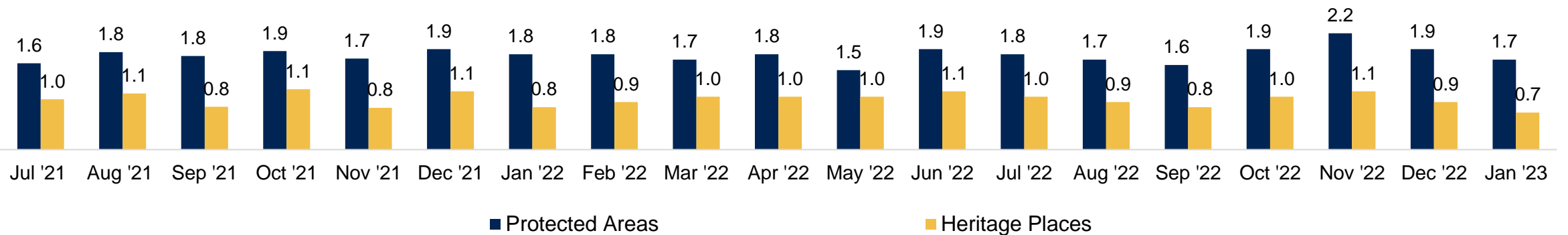
VISITATION FREQUENCY

Visitation to Protected Natural Areas has significantly increased this month, despite a slight drop in the average number of visits per person.

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



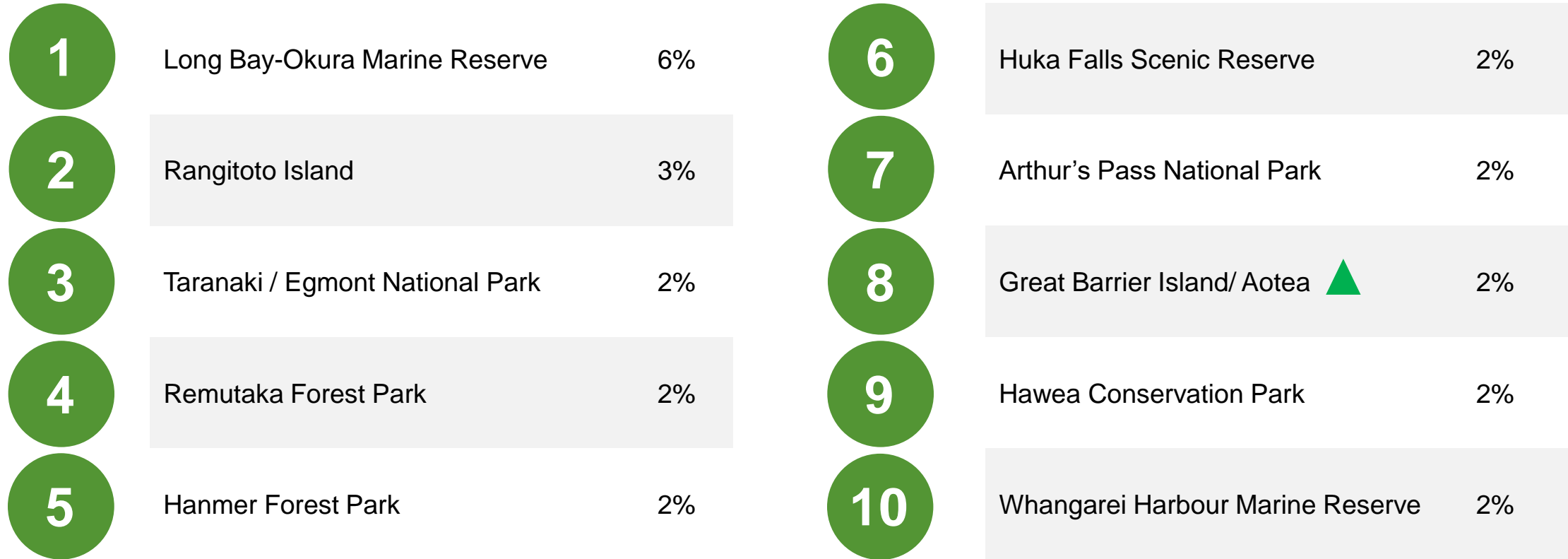
Average number of visits in the last month*



Green / red indicates significantly higher / lower than previous month

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.

TOP-10 PROTECTED NATURAL AREAS VISITED: JUN 2021–JAN 2023.

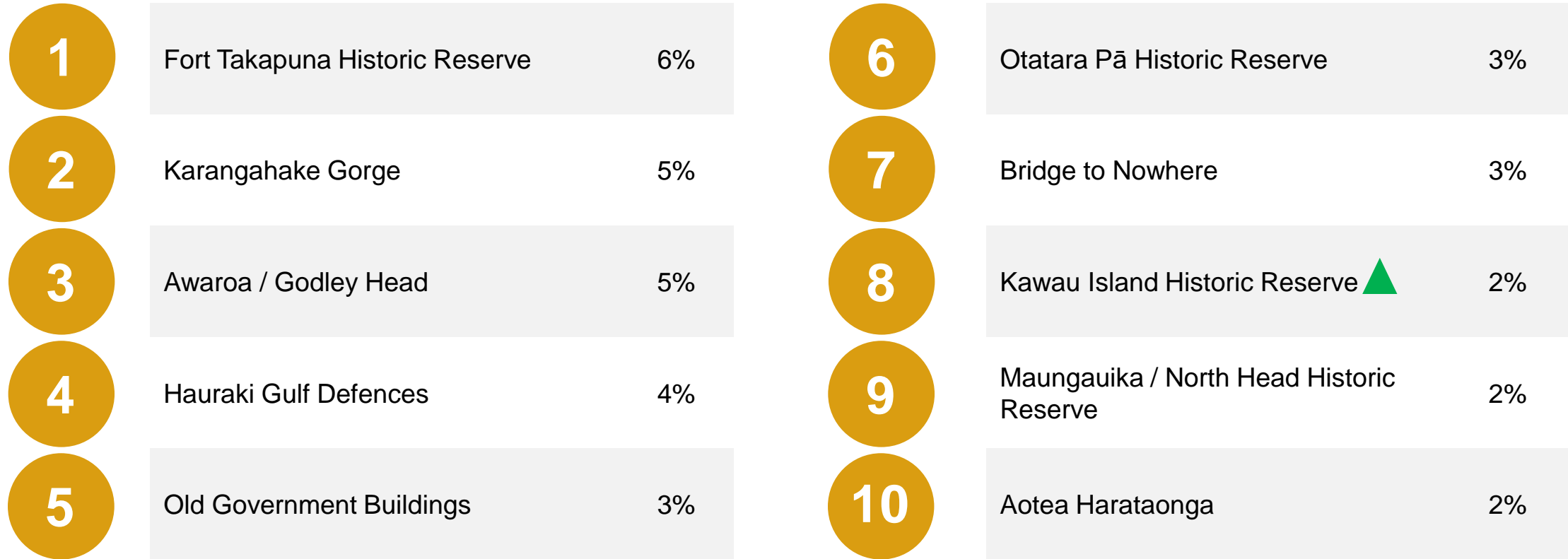


Green / red indicates Increase / decrease in rank position compared to previous month

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=8,957)

TOP-10 PROTECTED HERITAGE PLACES VISITED: JUN 2021–JAN 2023.



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=5,917)

Short walks & sightseeing remain the most common activities at Protected Natural Areas, with the normal springtime increase in visitors *swimming in a lake/sea/river*. However the abnormally wet spring in the upper North Island contributed to a decrease in day walks / hiking.

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	Oct'22	Nov'22	Dec'22	Jan'23
Base (n=)	8,957	397	422	464	380	407	379	401	478	477	450	484	504	498	492	451	436	442	465	433	497
Short walk (<3 hours)	39%	37%	38%	36%	38%	35%	33%	33%	41%	33%	41%	38%	38%	38%	38%	44%	42%	40%	41%	41%	44%
Sightseeing	30%	29%	28%	29%	32%	29%	29%	24%	31%	27%	30%	30%	32%	31%	30%	35%	34%	28%	31%	27%	32%
Photography	25%	25%	29%	26%	26%	21%	22%	21%	24%	24%	27%	24%	25%	24%	25%	26%	26%	26%	27%	26%	28%
Bird / wildlife watching	25%	25%	27%	28%	24%	26%	26%	24%	22%	20%	24%	25%	24%	24%	25%	26%	24%	24%	24%	27%	25%
Connecting with nature	23%	22%	21%	25%	22%	17%	25%	21%	21%	21%	24%	24%	25%	25%	26%	20%	22%	25%	22%	21%	25%
Picnic, barbeque, etc	20%	20%	21%	17%	19%	17%	20%	19%	22%	21%	22%	22%	18%	19%	20%	20%	21%	21%	20%	22%	23%
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%	23%	21%	25%	19%
Swimming in a lake/river/sea	9%	9%	6%	7%	5%	4%	5%	11%	18%	14%	16%	11%	10%	6%	7%	5%	6%	7%	9%	8%	16%
Connecting with history	13%	10%	13%	14%	14%	11%	17%	10%	12%	11%	16%	14%	14%	13%	13%	10%	13%	17%	15%	15%	13%
Camping	12%	15%	14%	12%	14%	14%	14%	12%	16%	14%	13%	12%	11%	11%	11%	11%	8%	10%	11%	11%	12%
Connecting with culture	10%	8%	9%	11%	11%	8%	11%	12%	10%	11%	10%	10%	12%	7%	11%	8%	8%	13%	11%	10%	10%

Green / red indicates significantly higher / lower than previous month

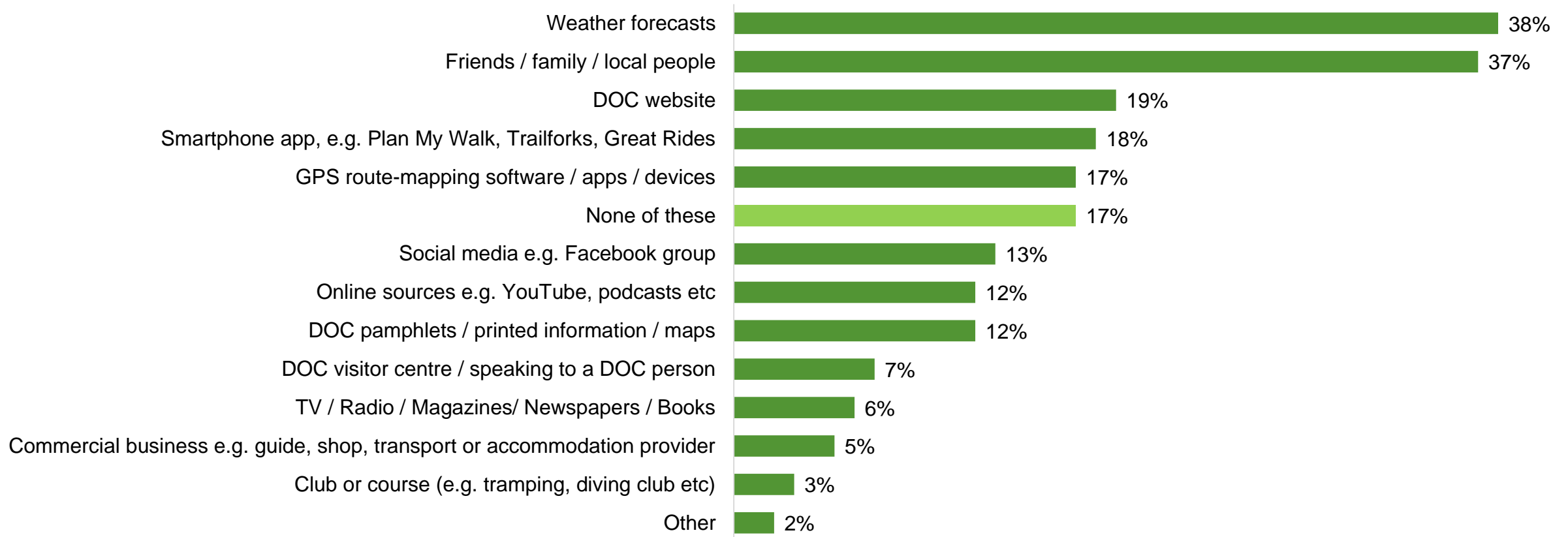
Q12: Thinking about your most recent visit to <LOCATION SELECTED IN Q8>, which of the following activities did you engage in?

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

Weather forecasts and friends / family / local people remain the most used sources for planning visits to Protected Natural Areas.

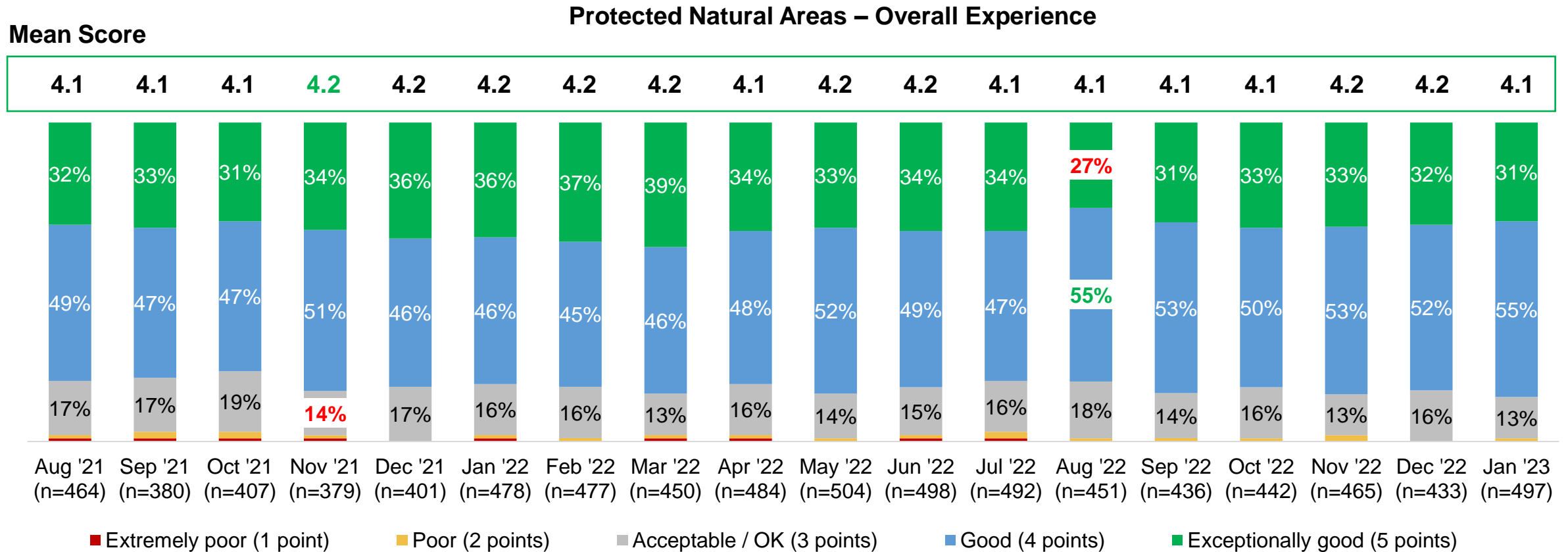
Sources of Information used for Planning



Q12b: Thinking about your most recent visit to <LOCATION SELECTED IN Q8>, what, if any information sources did you use to help plan for a successful trip?

Base: Those who visited a Protected Natural Area (n=1,395)

Satisfaction with the overall experience at Protected Natural Areas remains stable.

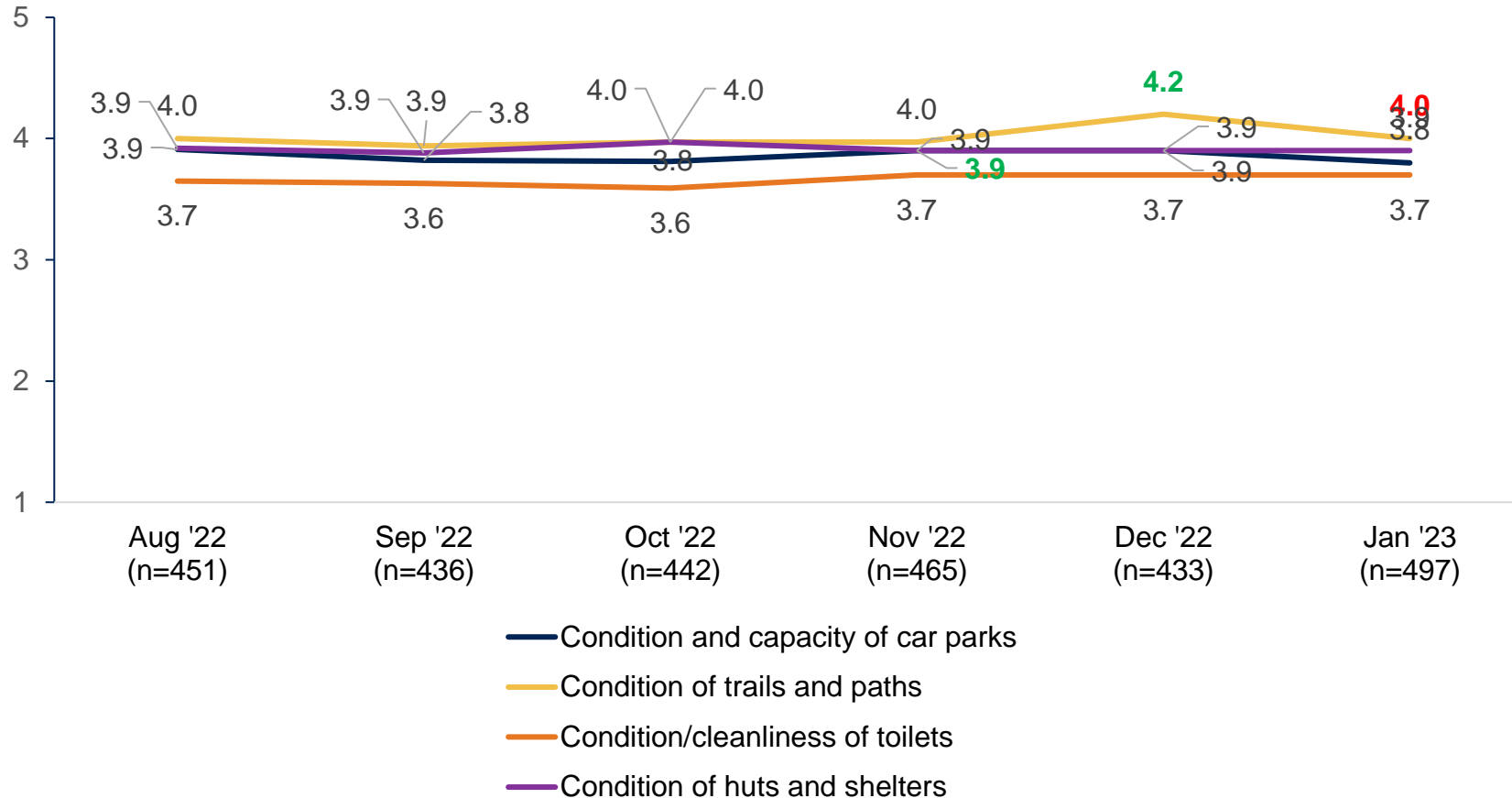
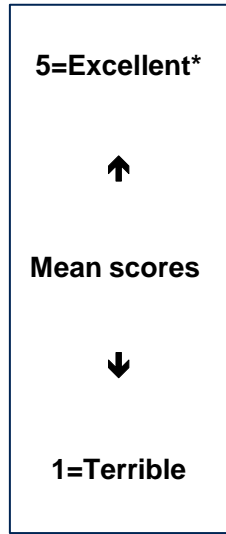


Q15: Overall, how would you rate your experience at <LOCATION SELECTED IN Q8>?

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

Visitors' satisfaction with the *condition of trails and paths* has significantly decreased this month, with other factors remaining stable. This may reflect the very wet upper North Island spring, with its associated trail damage.

Satisfaction with Protected Natural Areas: 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.

Visitor satisfaction with *overall standard of maintenance* has significantly decreased this month.

Satisfaction with Protected Natural Areas: Signage and Maintenance

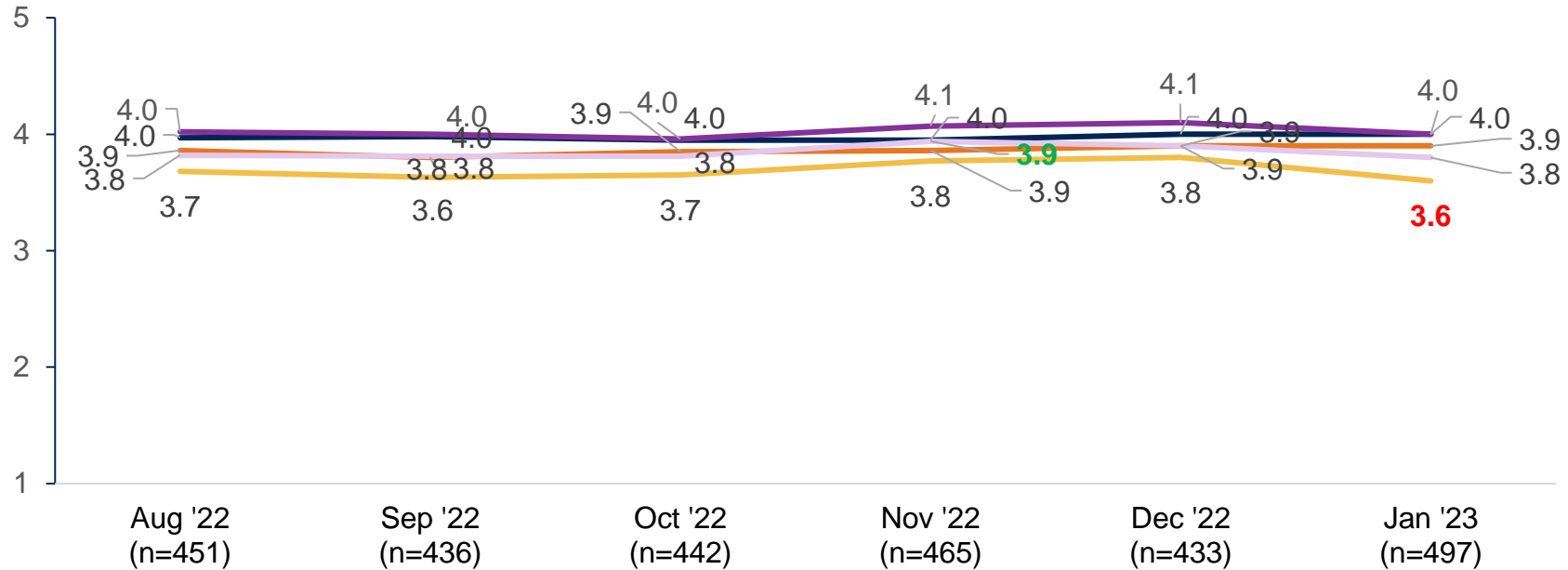
5=Excellent*

↑

Mean scores

↓

1=Terrible

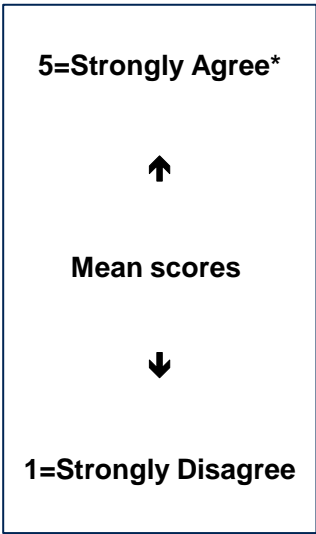


- Safety information, directional signs, barriers, bridges, etc.
- Information and stories about nature, Māori culture, local history, etc.
- Overall suitability of facilities provided at the place - car parks, paths, toilets, huts, etc.
- Overall standard of maintenance/presentation of the place
- Management of impacts from visitors at the place

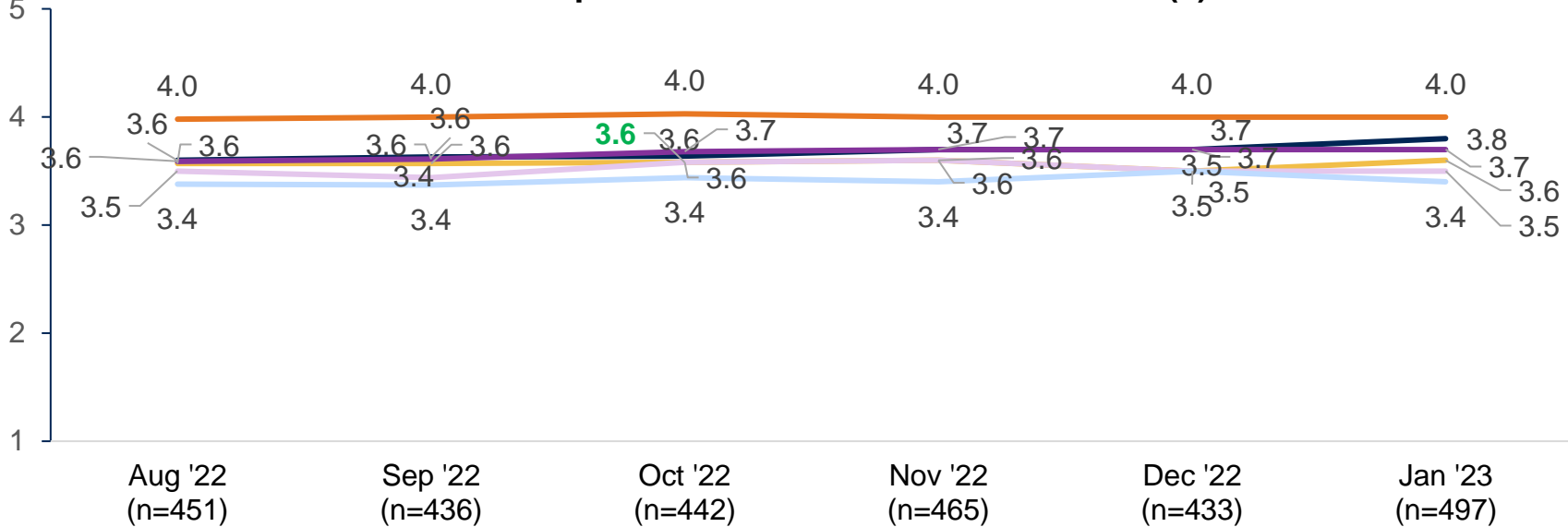
Q14a: Still thinking about your most recent visit to <LOCATION SELECTED IN Q8>, how would you rate the following aspects listed below?

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.

Visitor experience at Protected Natural Areas remains generally stable this month with no major changes.



Personal Experience at Protected Natural Areas (1)



- 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

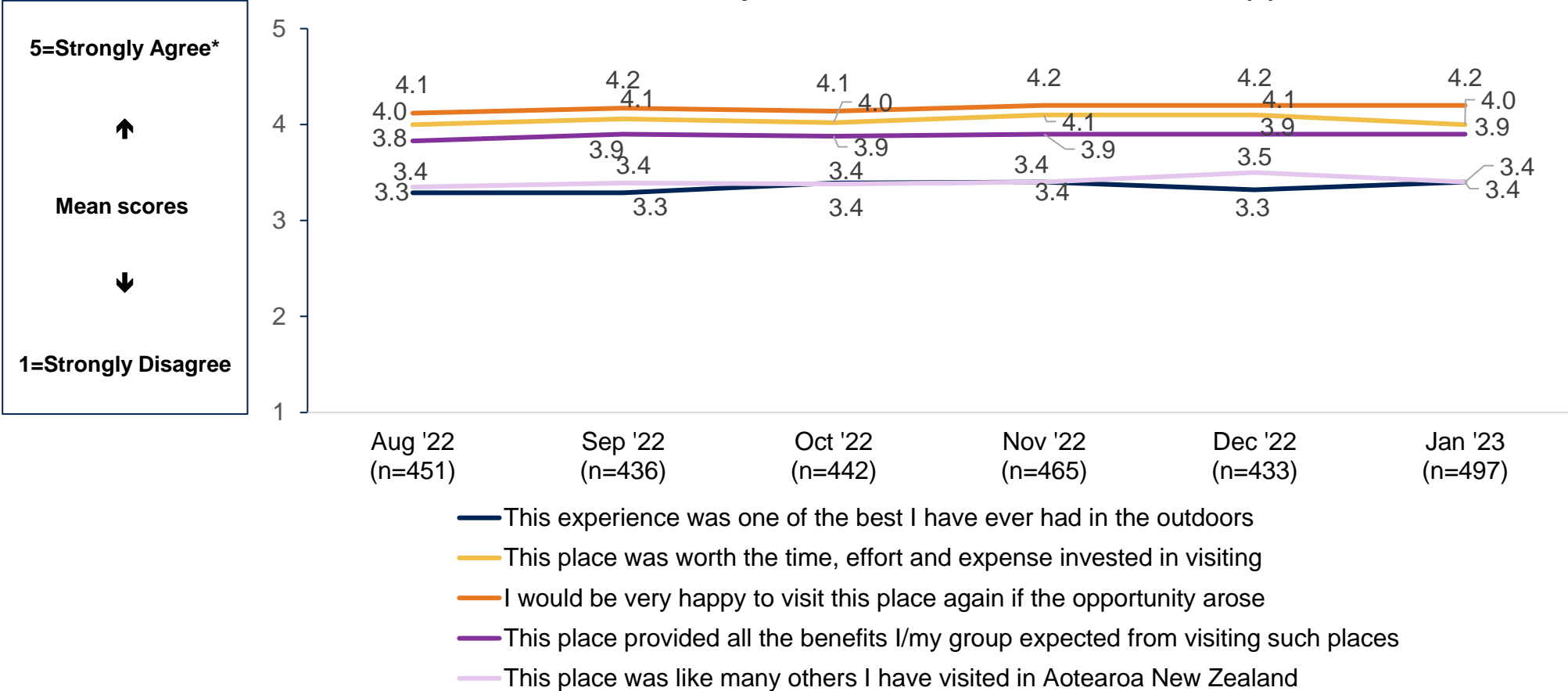
Q14b: Still thinking about your most recent visit to <LOCATION SELECTED IN Q8>, how much do you agree or disagree with each of the statements below?

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

Green / red indicates significantly higher / lower than previous month

Visitor experience at Protected Natural Areas remains generally stable this month with no major changes.

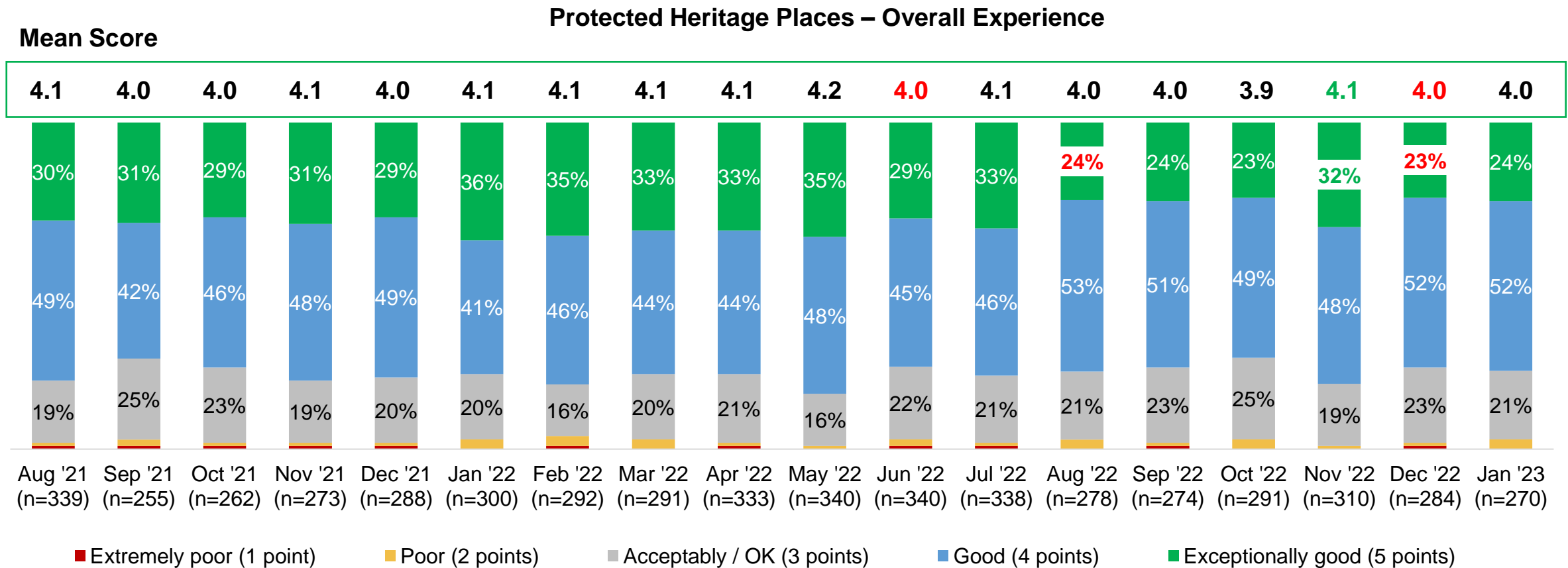
Personal Experience at Protected Natural Areas (2)



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:** The mean score excludes 'Don't know / not applicable' responses. Higher mean scores are desirable.

Satisfaction with the overall experience at Protected Heritage Places remains stable this month but remains lower than its high in November following a significant decrease in December.



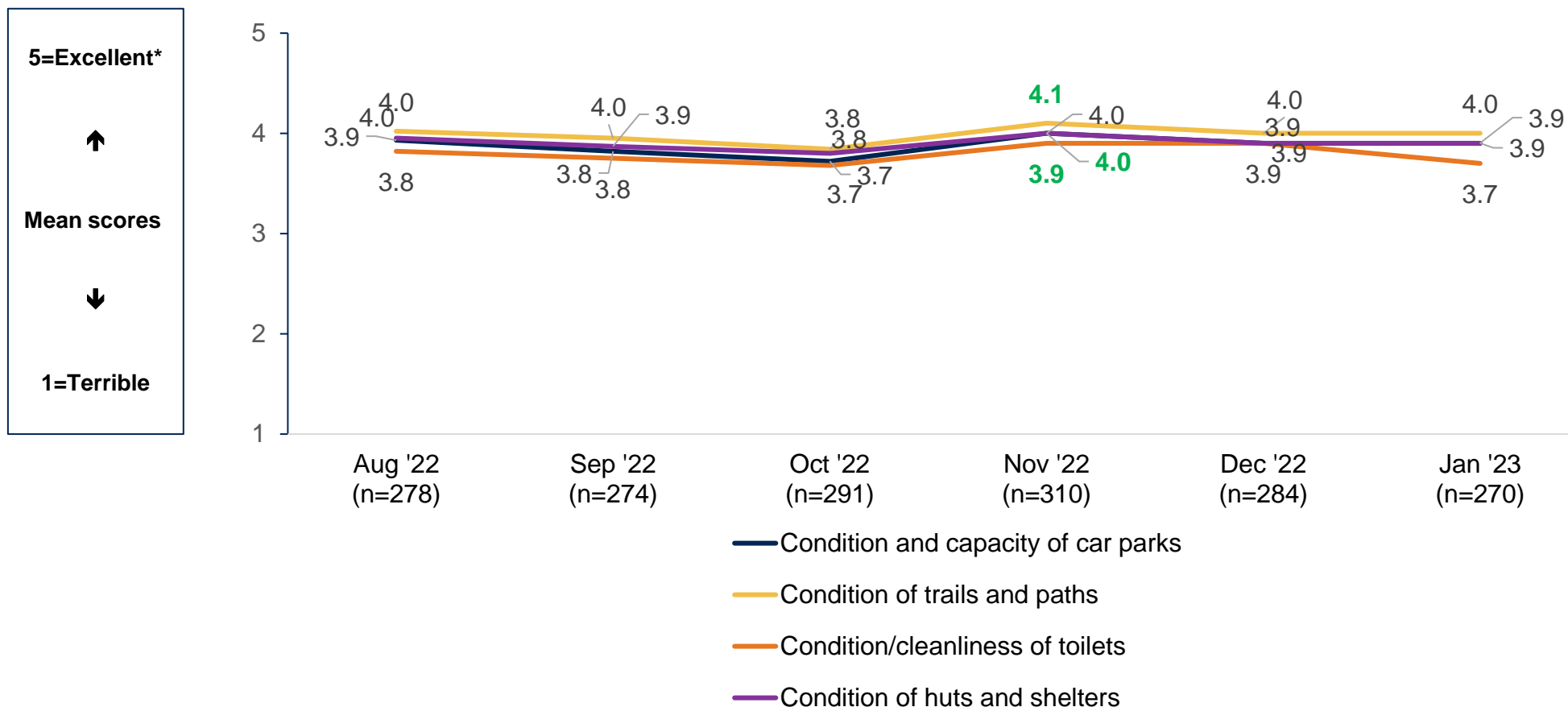
Q27: Overall, how would you rate your experience at <LOCATION SELECTED IN Q20>?

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

Green / red indicates significantly higher / lower than previous month

Visitor satisfaction with facilities at Protected Heritage Places remains at a higher level following significant increases in November.

Satisfaction with Protected Heritage Places: Facilities

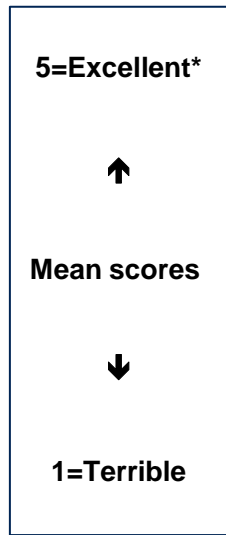


Green / red indicates significantly higher / lower than previous month

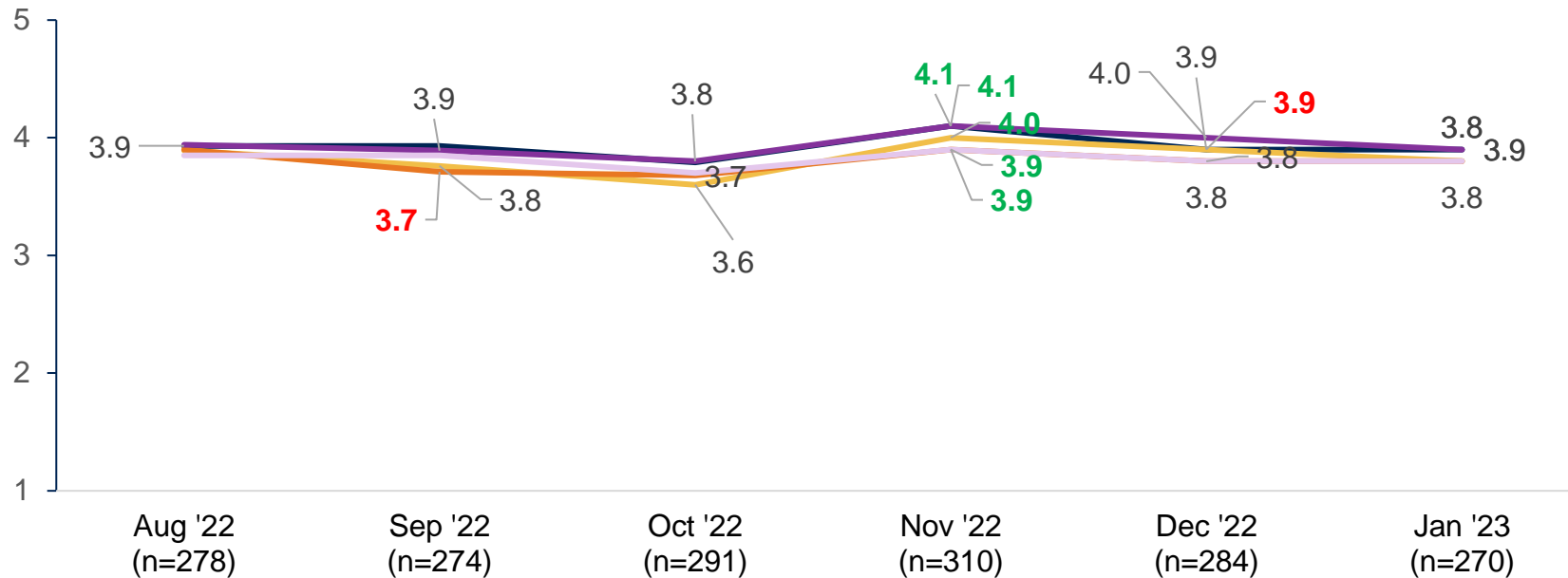
Q26a: Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how would you rate the following aspects listed below?

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 with *overall standard of maintenance* remains lower than its peak in November.



Satisfaction with Protected Heritage Places: Signage and Maintenance



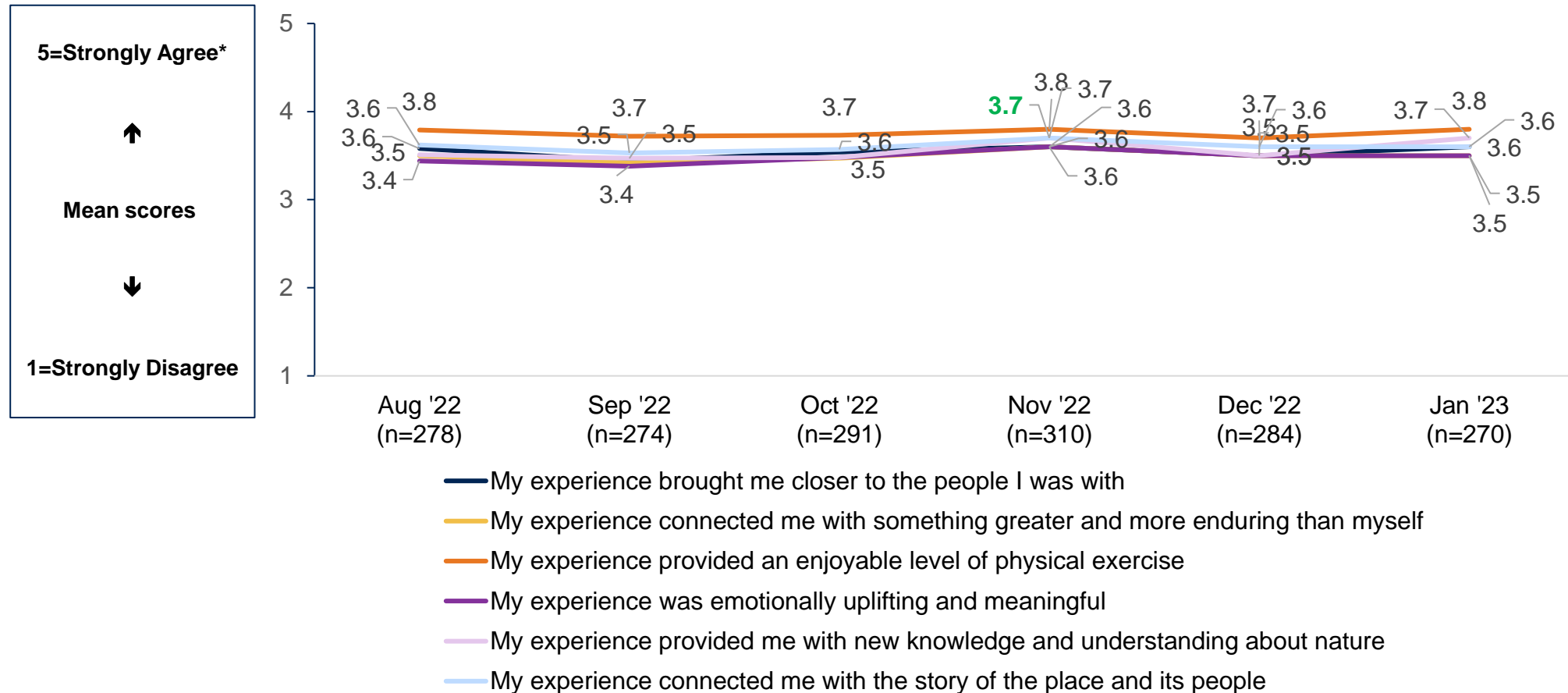
- Safety information, directional signs, barriers, bridges, etc.
- Information about nature, Māori culture, local history, etc.
- Overall suitability of facilities provided at the place - car parks, paths, toilets, huts, etc.
- Overall standard of maintenance/presentation of the place
- Management of impacts from visitors at the place

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.

Measures of personal experience at Protected Heritage Places remain stable.

Personal Experience at Protected Heritage Places (1)



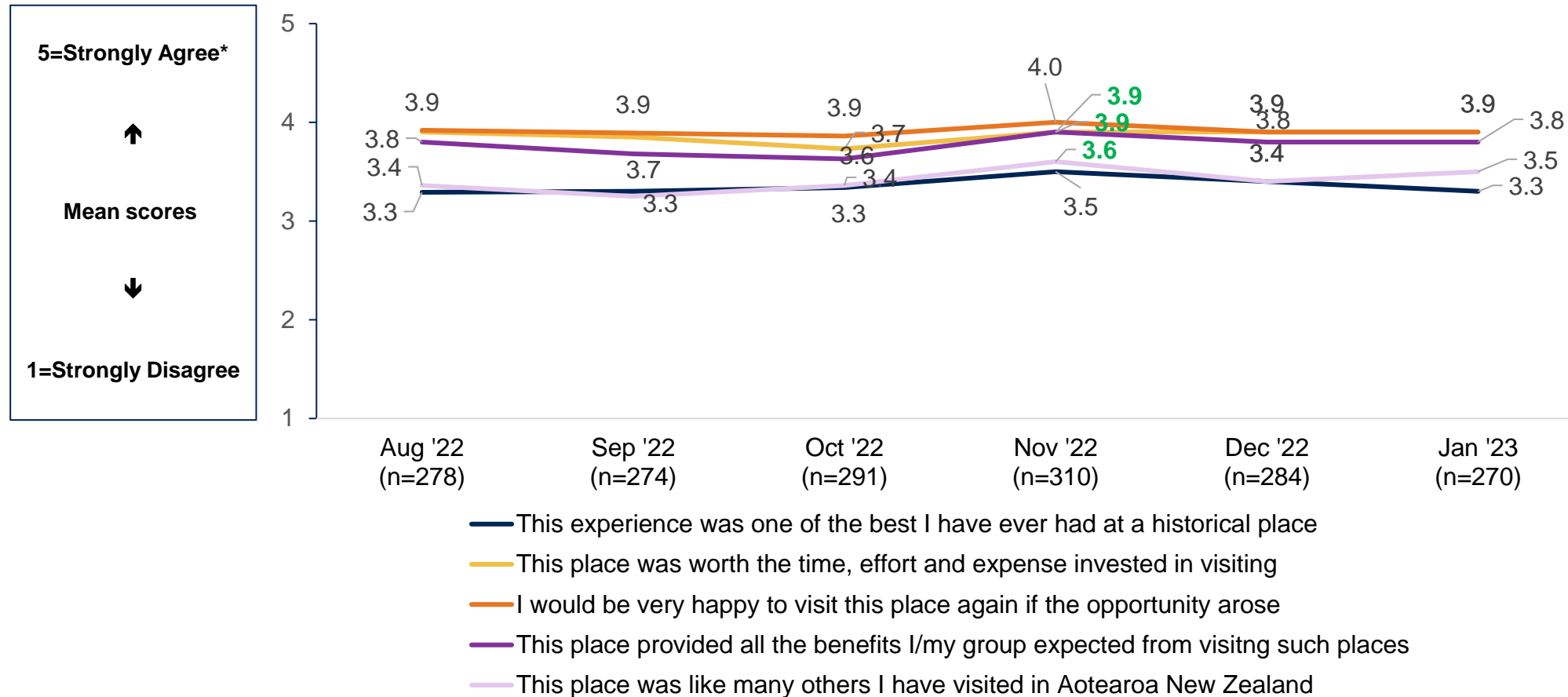
Green / red indicates significantly higher / lower than previous month

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: The mean score excludes 'Don't know / not applicable' responses. Higher mean scores are desirable.

Personal experience among Protected Heritage Place visitors remains stable compared to last month.

Personal Experience at Protected Heritage Places (2)



Green / red indicates significantly higher / lower than previous month

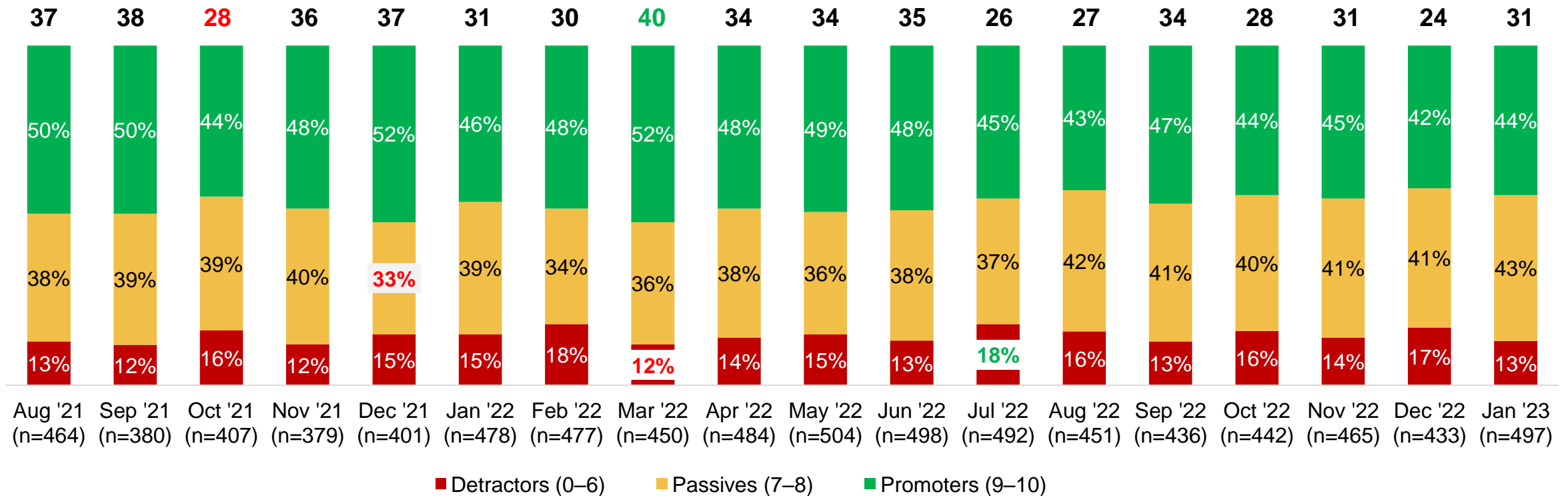
Q26b: Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how much do you agree or disagree with each of the statements below?

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

NPS

Protected Natural Areas' NPS has increased as the number of detractors has fallen.

Protected Natural Areas – NPS



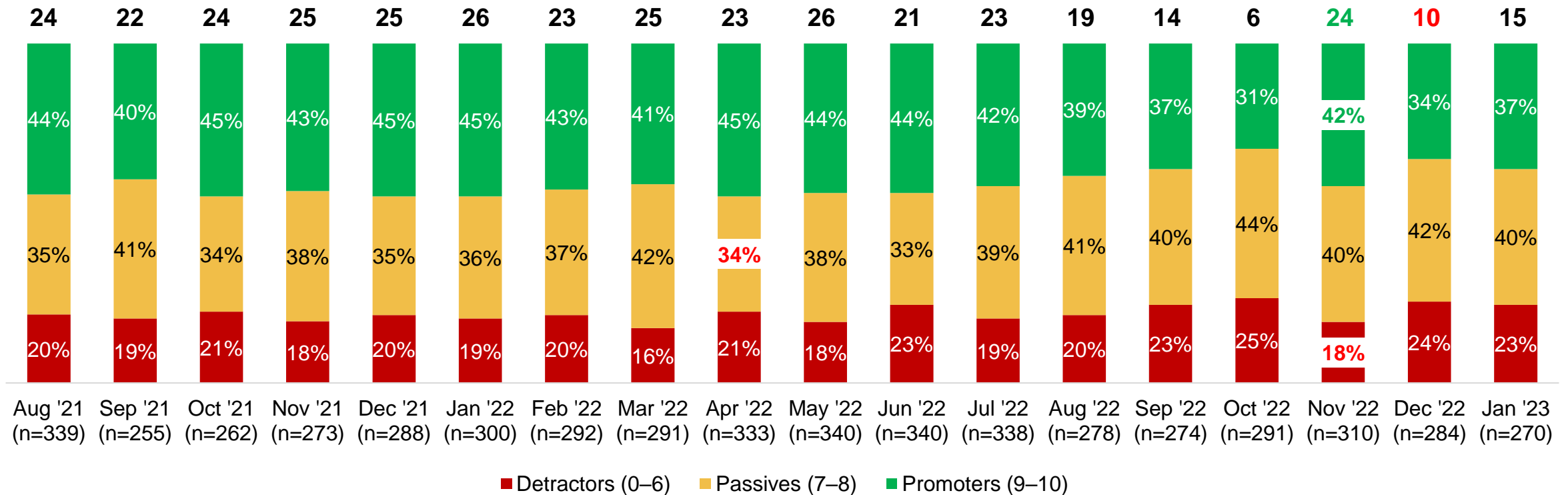
Green / red indicates significantly higher / lower than previous month

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 increased as visitor experiences shift from passives and detractors toward promoter interactions.

Protected Heritage Places – NPS



Green / red indicates significantly higher / lower than previous month

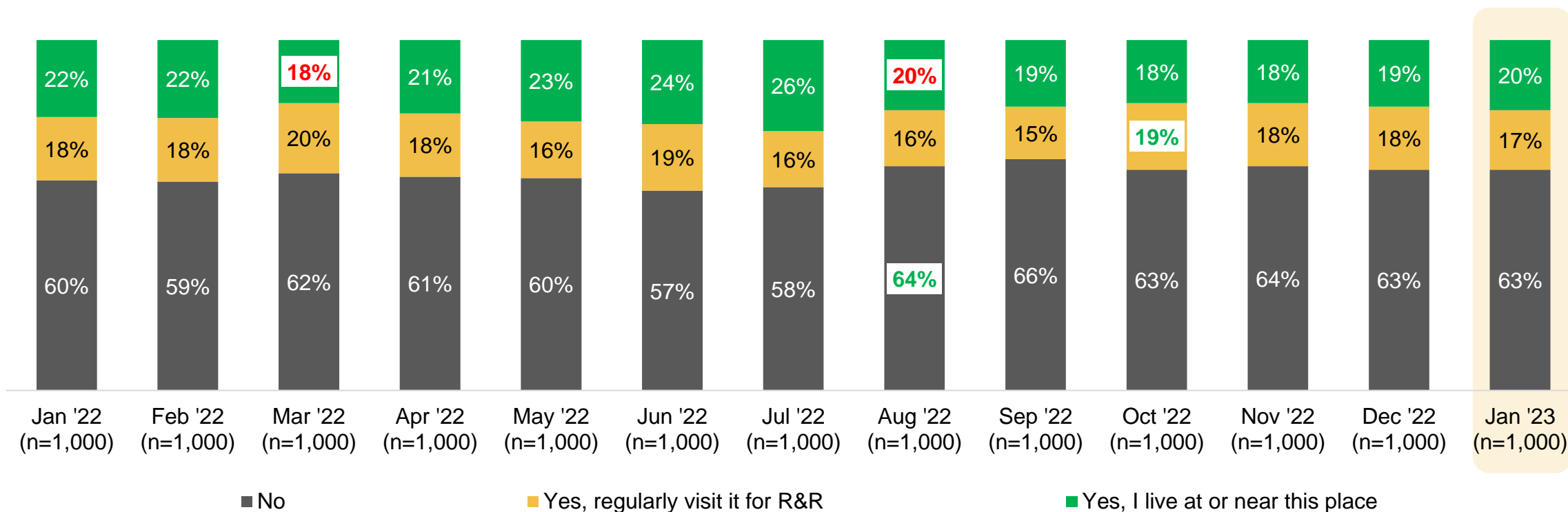
Q28: How LIKELY is it you would RECOMMEND <LOCATION SELECTED IN Q20> to your family or friends?

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

‘THRIVE’ MODULE

The number of visitors who regularly visit a Protected Natural Area of personal importance to them remains stable this month.

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



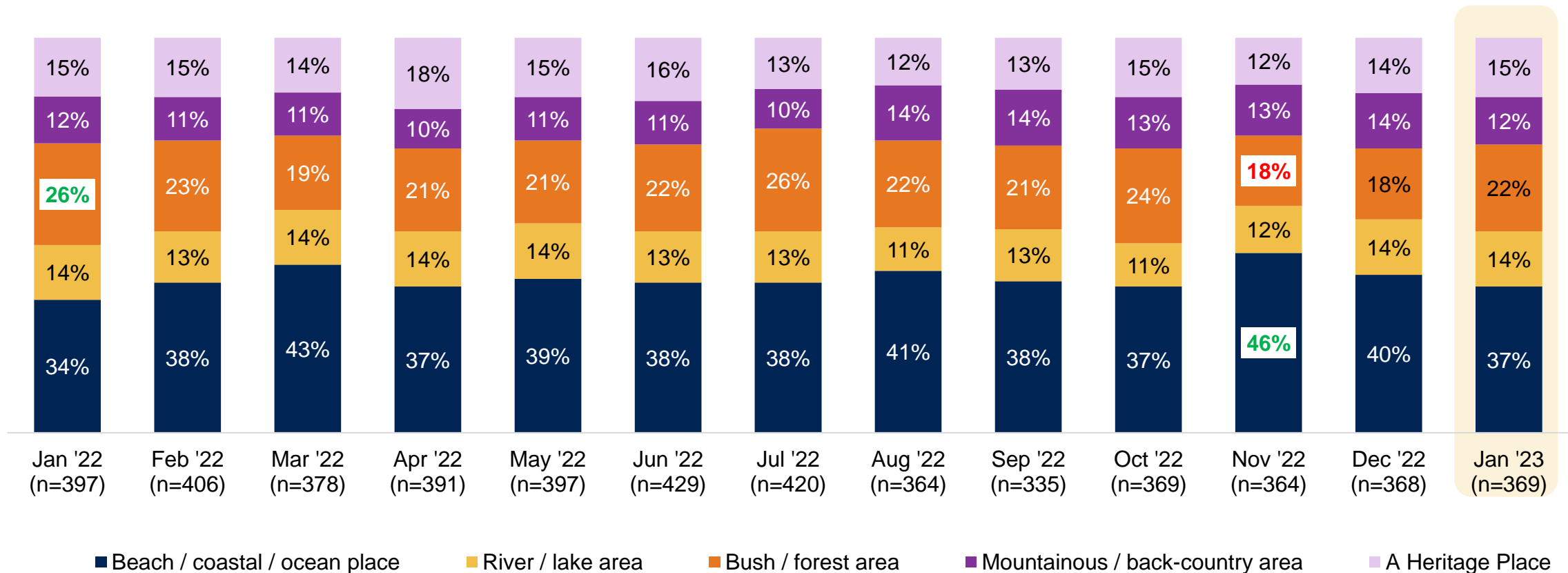
Green / red indicates significantly higher / lower than previous month

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

There are slight changes in the different types of locations being especially important, with a increase in *bush/forest* areas and decrease in *beach/coastal/ocean* places.

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



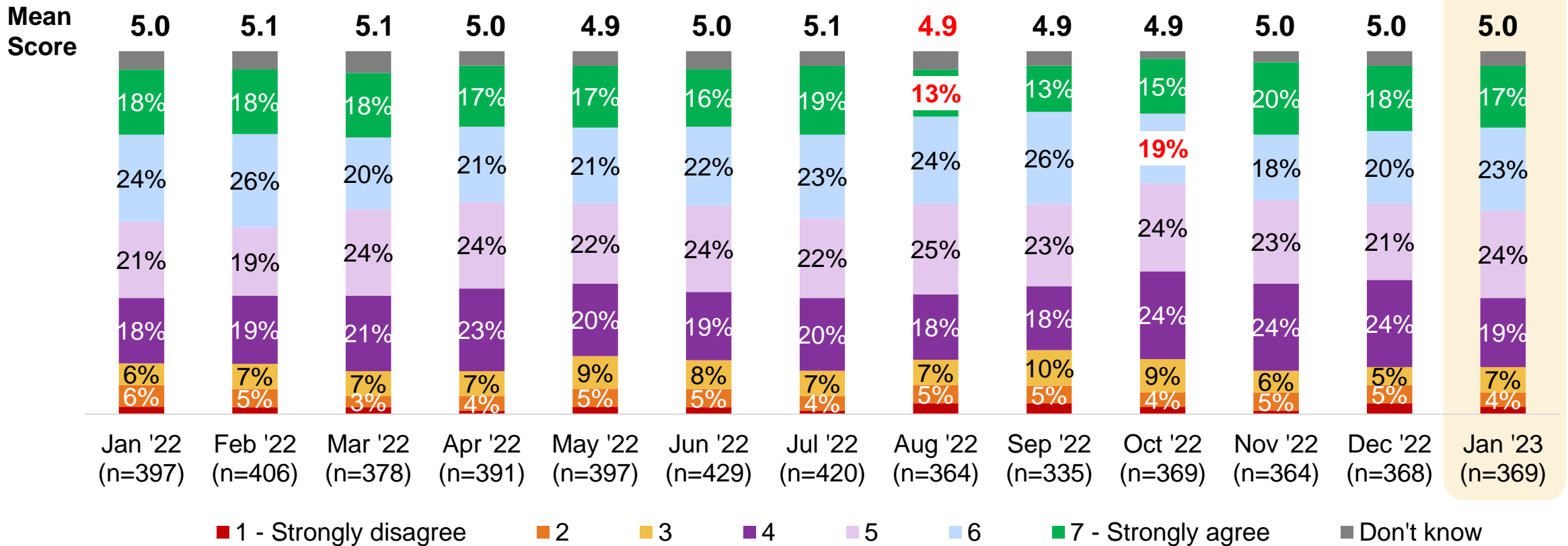
Green / red indicates significantly higher / lower than previous month

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

Base: Those who live near or regularly visit this place

The number of people who strongly agree that *visitors enable local stories, identities & traditions* remains stable, with a slight increase in those giving a score of 5-6.

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



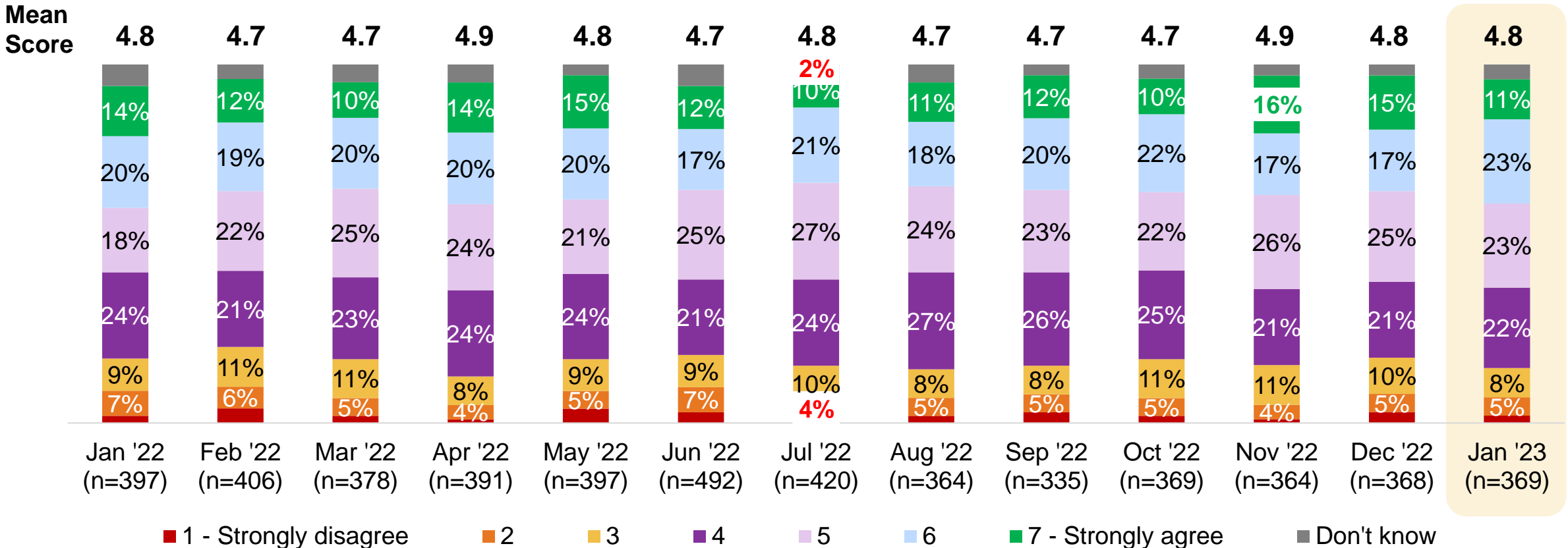
Green / red indicates significantly higher / lower than previous month

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

Base: Those who live near or regularly visit this place

Agreement that *visitors improve the quality of life of the local communities* remains similar to this time last year, with a slight increase in those giving a score of 5-6.

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



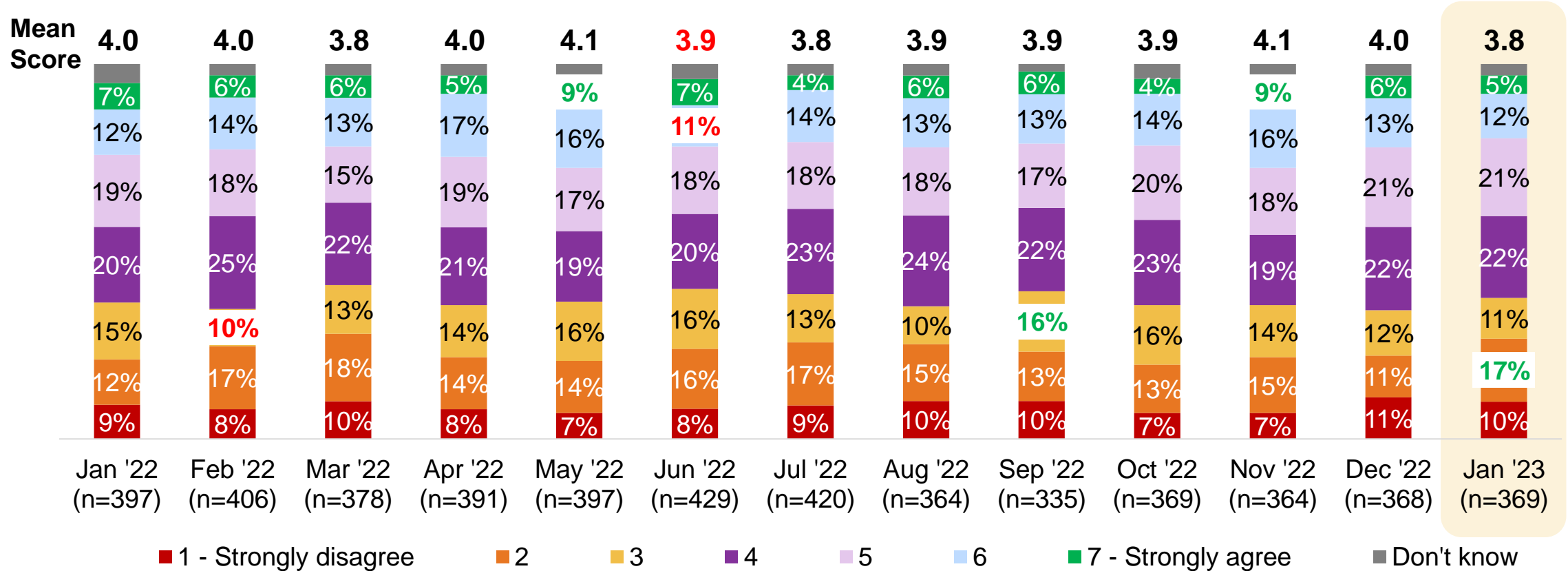
Green / red indicates significantly higher / lower than previous month

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

Base: Those who live near or regularly visit this place

The number of people who strongly agree that their ‘special’ PNA suffers from *visitor-created damage* has decreased this month, with a significant increase in those disagreeing.

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



Green / red indicates significantly higher / lower than previous month

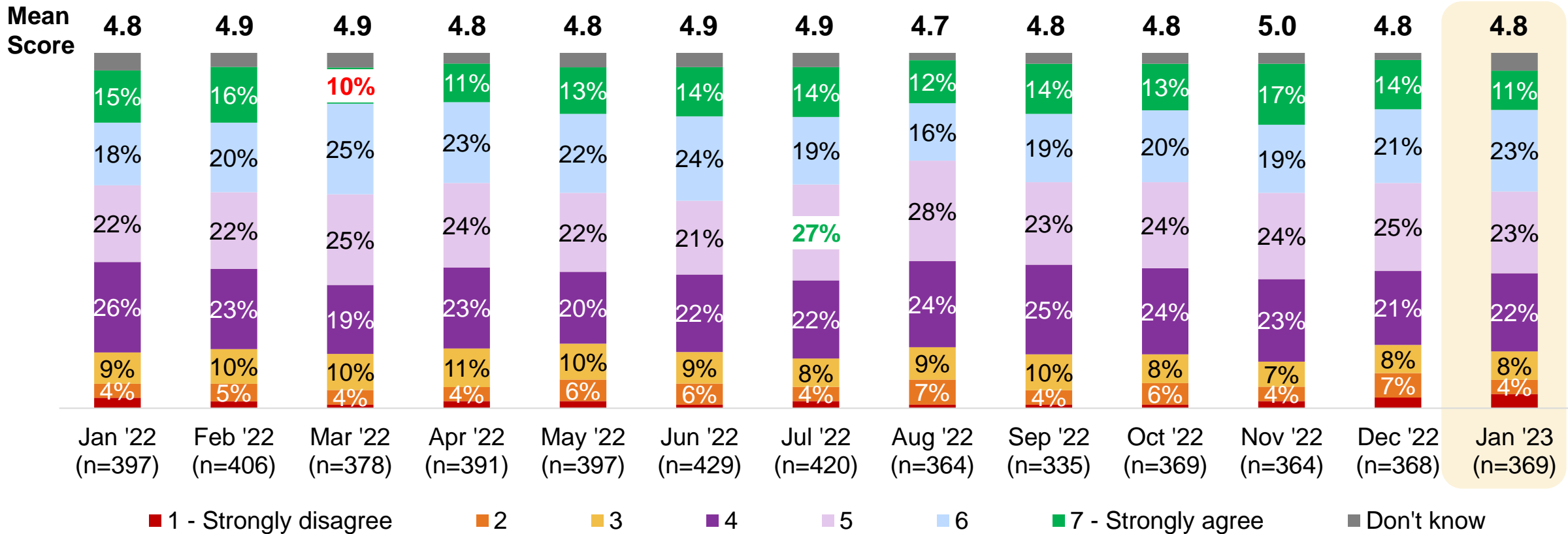
Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place

The number of people who agree that Protected Natural Areas suffer from *visitor-created damage* remains stable.

Green / red indicates significantly higher / lower than previous month

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

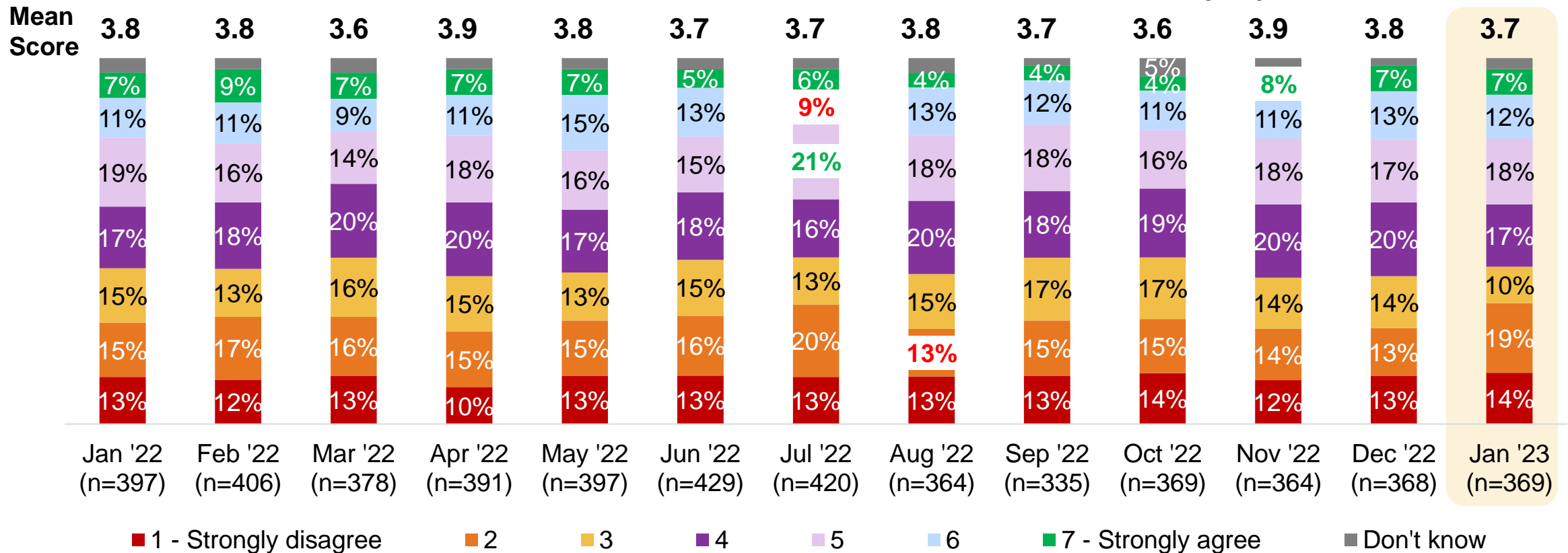


Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place

This month more people disagree that *visitors affect the attractiveness of a Protected Natural Area*.

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



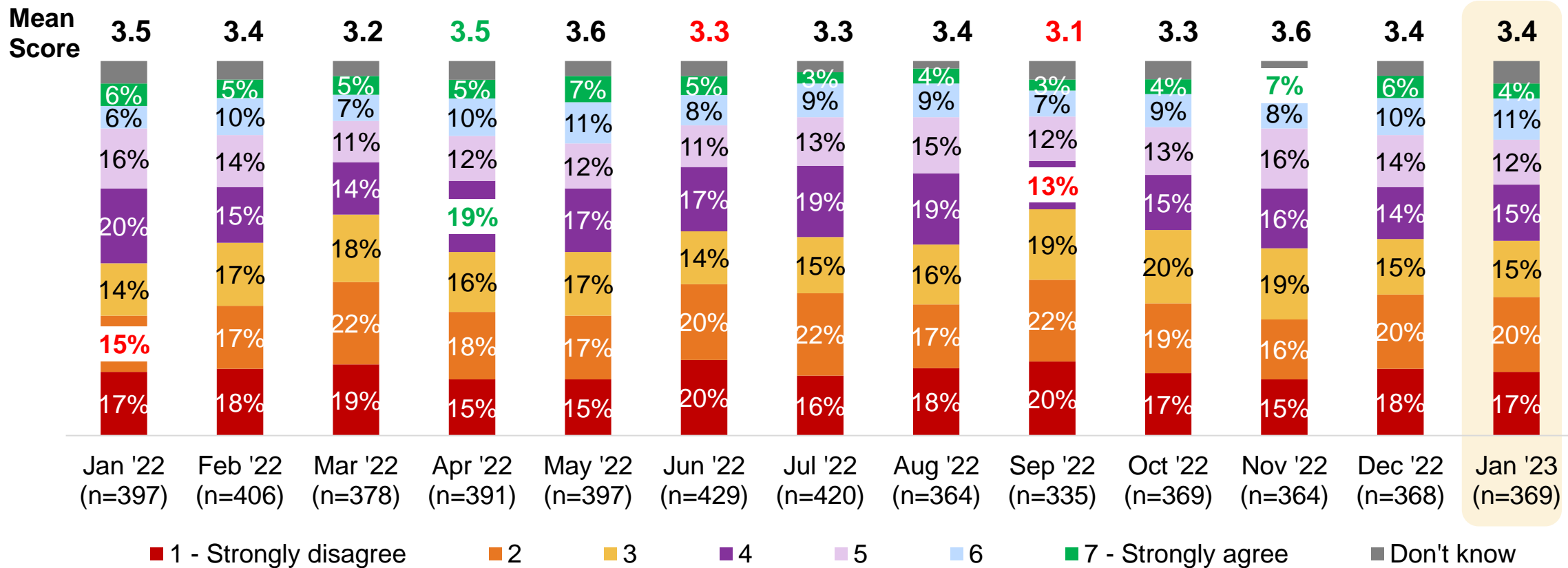
Green / red indicates significantly higher / lower than previous month

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

Base: Those who live near or regularly visit this place

People continue to disagree that *visitors weaken local traditions & cultures*.

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



Green / red indicates significantly higher / lower than previous month

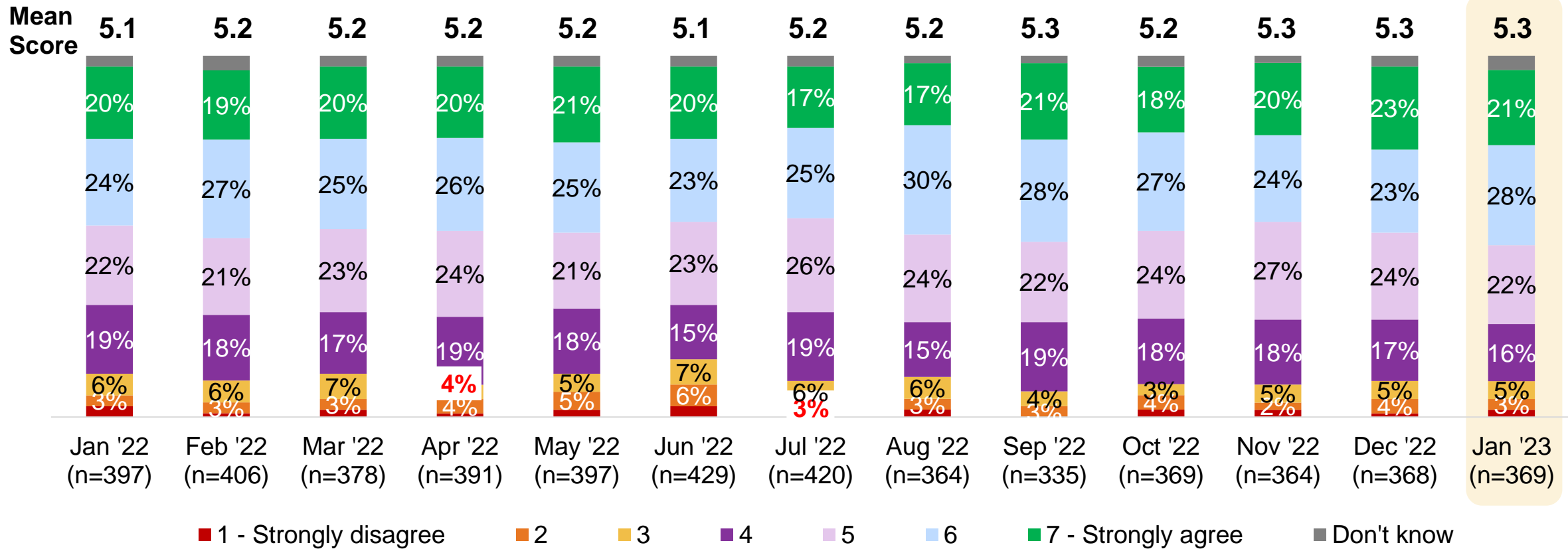
Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place

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Most continue to agree that *PNA* visitors improve the local economy.

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



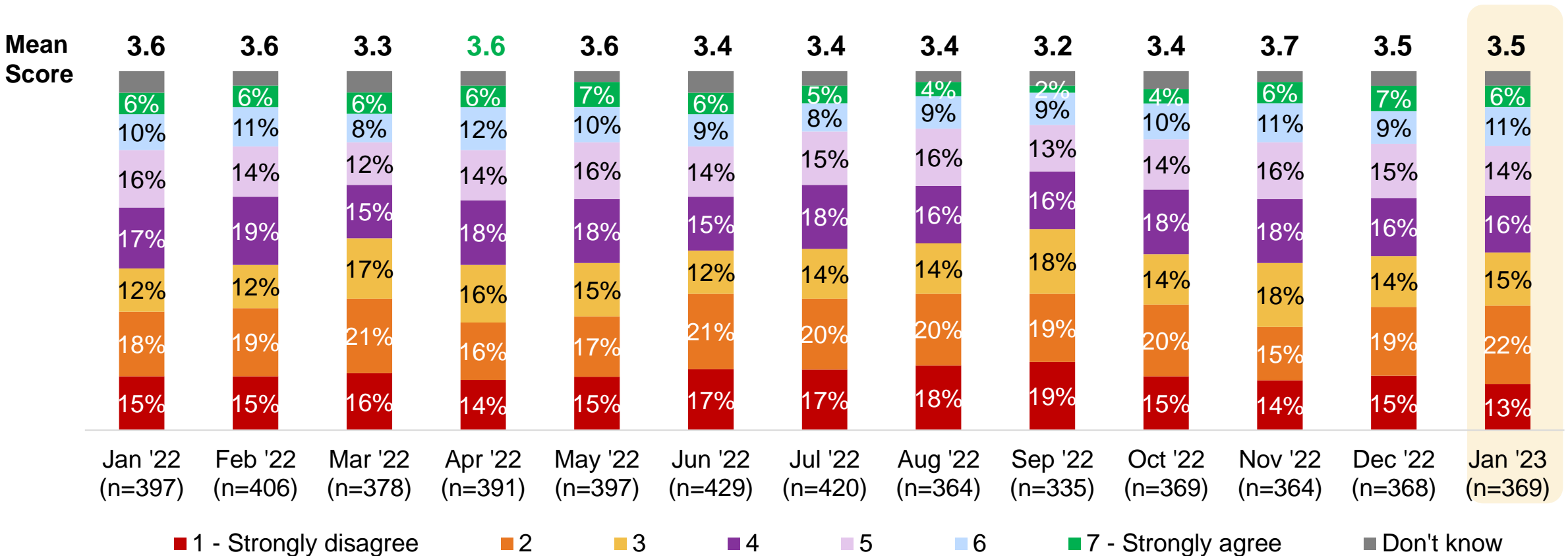
Green / red indicates significantly higher / lower than previous month

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

Base: Those who live near or regularly visit this place

Most continue to disagree that *visitors add unwanted financial burdens to local communities*.

“Visitors to this Protected Natural Area add unwanted financial burdens onto 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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People are more likely to see positive effects for *heritage places* and negative effects for *river / lake* and *back country* communities, while impressions about the effects on *bush / forest* communities tend to be more neutral.

		Mean*					
							
		Total	Beach / Coast	River / Lakes	Bush / Forest	Back-Country	Heritage Place
		n=	2,229	738	1,255	687	862
Positive Effects	Visitors to this Protected Natural Area improve the local economy	5.2	5.3	5.2	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	5.0	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	4.8	4.8	4.9	4.6	4.8	4.8
	AVERAGE AGREEMENT WITH POSITIVE STATEMENTS (<i>higher numbers are better</i>)	5.0	5.0	5.0	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	4.1	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	3.7	3.8	4.0	3.4	3.9	3.6
	Visitors to this Protected Natural Area add unwanted financial burdens onto the local communities	3.5	3.5	3.8	3.3	3.6	3.5
	Visitors to this Protected Natural Area weaken the local communities' traditions & cultures	3.4	3.4	3.7	3.1	3.5	3.5
	AVERAGE AGREEMENT WITH NEGATIVE STATEMENTS (<i>lower numbers are better</i>)	3.7	3.7	3.9	3.4	3.8	3.6

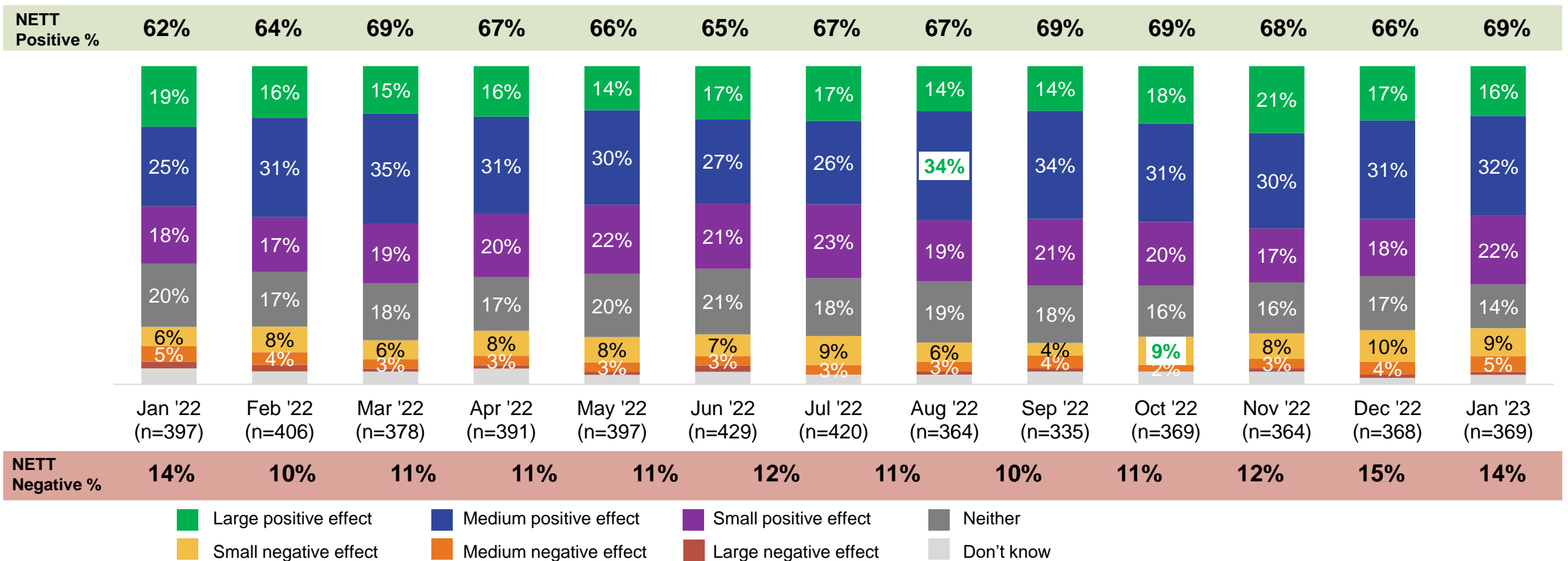
Green / red indicates significantly higher / lower than total

Q41: Which of the following best describes the location of this place? 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 Protected Natural Areas continue to have positive views on the effect of visitors.

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

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**THANK
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