

DOC PUBLIC PULSE OF CONSERVATION

Monthly Topline Report – August 2022

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31 August, 2022



GAME CHANGERS



KEY FINDINGS – AUGUST ‘22

- This month, the number of New Zealanders visiting at least one Protected Natural Area (45%) in the past month has decreased slightly from July (49%), whereas Protected Heritage Place visits (28%) have fallen compared to July (45%).
- Visitor frequency for both Protected Natural Areas (1.7) and Protected Heritage Places (0.9) has slightly decreased compared to July (1.8 and 1.0 respectively). This could be due to the abnormally high rainfall experienced across much of the country and / or the renewed ability to travel overseas without being subject to COVID-19 quarantine requirements.
- Younger New Zealanders (18–34) and Māori continue to have the highest visitation rates to both Protected Natural Areas and Heritage Places.
- Visitors to Protected Natural Areas and Heritage Places are satisfied overall, although *information around nature, Māori culture, etc.* could be improved at Protected Natural Areas, while *toilet cleanliness* could be improved at both types of location.
- Protected Heritage Places’ NPS has decreased to its lowest level since tracking began (19 points). This can be attributed to an increase in Passive ratings and a decrease in Promoters. Protected Natural Areas’ NPS remains stable at a lower level compared to the first half of 2022.



SUMMARY


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

BACKGROUND & METHODOLOGY



Sample size

1,000




Fieldwork dates
August 15–24, 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.

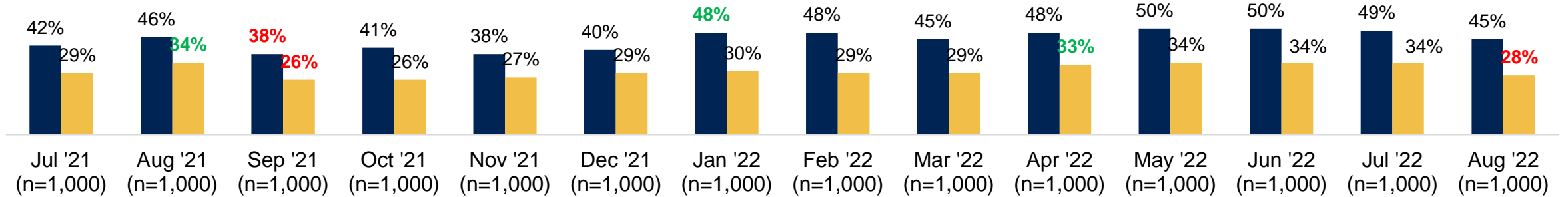
Previous waves

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

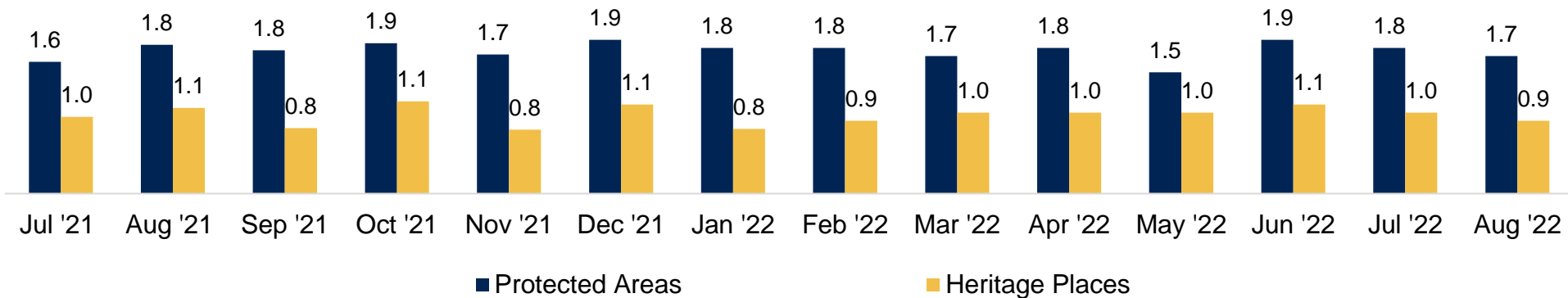
VISITATION FREQUENCY

THE PROPORTION OF NEW ZEALANDERS VISITING A PROTECTED HERITAGE PLACE HAS DECLINED COMPARED TO LAST MONTH. YOUNG & MĀORI PEOPLE CONTINUE TO VISIT MOST OFTEN.

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

- 3.4 18–34 years
- 0.9 50–64 years
- 0.6 65+ years

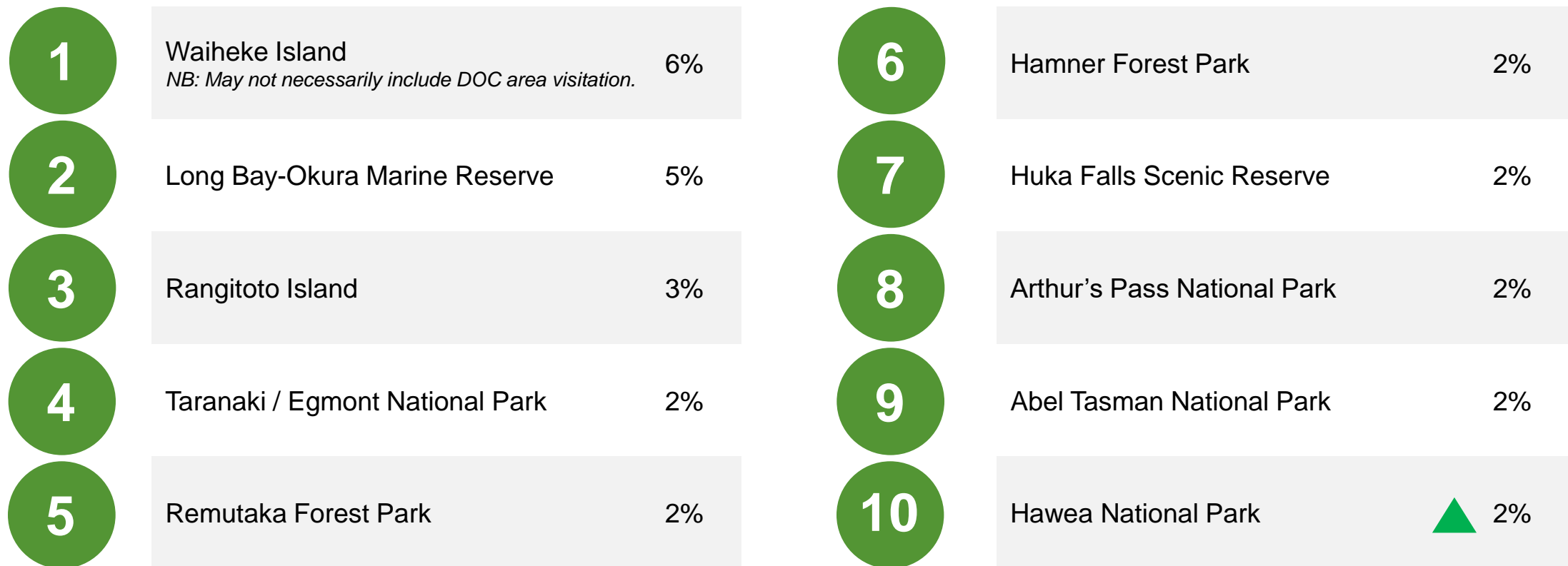
Protected Heritage Places

- 1.6 Māori
- 1.5 18–34 years
- 0.3 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

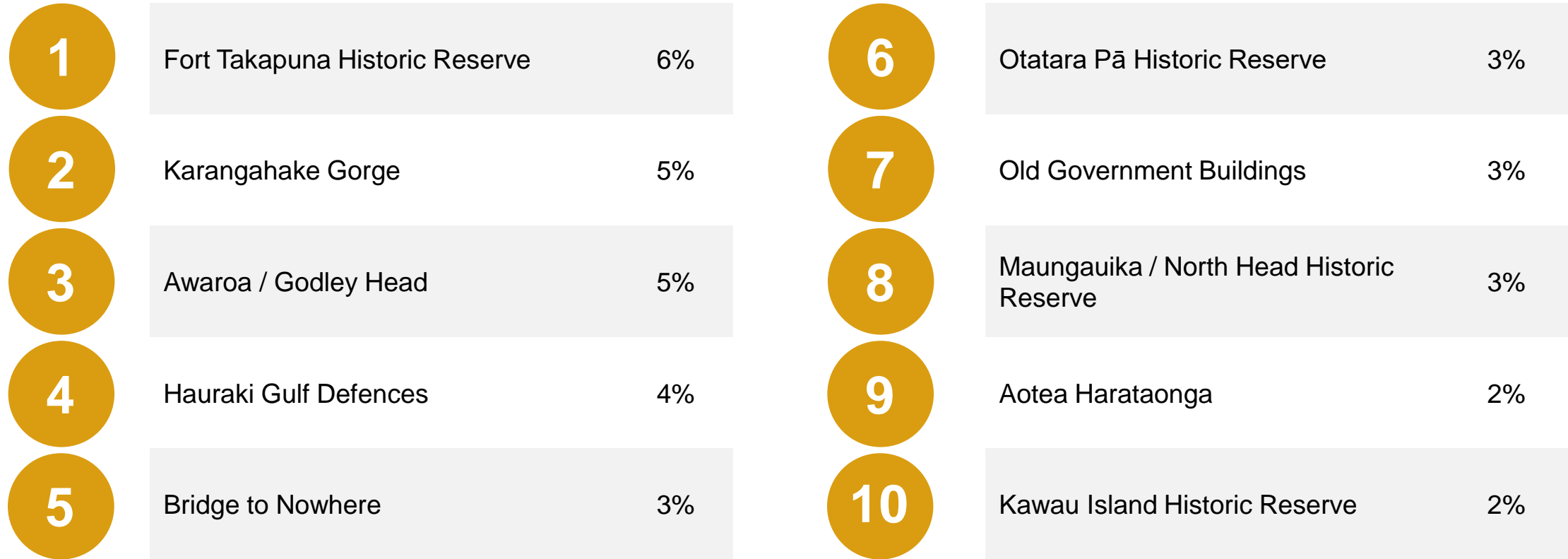
TOP-10 PROTECTED NATURAL AREAS VISITED: JUN 2021–AUG 2022



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=6,684)

TOP-10 PROTECTED HERITAGE PLACES VISITED: JUN 2021–AUG 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=4,488)

SHORT WALKS & SIGHTSEEING REMAIN THE MOST COMMON ACTIVITIES AT PNAS & ARE AT HIGHER LEVELS THAN JULY.

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
Base (n=)	6,233	392	422	464	380	407	379	401	478	477	450	484	504	498	492	451
Short walk (<3 hours)	37%	37%	38%	36%	38%	35%	33%	33%	41%	33%	41%	38%	38%	38%	38%	44%
Sightseeing	29%	29%	28%	29%	32%	29%	29%	24%	31%	27%	30%	30%	32%	31%	30%	35%
Photography	24%	25%	29%	26%	26%	21%	22%	21%	24%	24%	27%	24%	25%	24%	25%	26%
Bird / wildlife watching	25%	25%	27%	28%	24%	26%	26%	24%	22%	20%	24%	25%	24%	24%	25%	26%
Day walk / hike (>3 hours but not overnight)	23%	25%	25%	23%	26%	21%	25%	26%	22%	21%	20%	24%	21%	26%	21%	23%
Connecting with nature	22%	22%	21%	25%	22%	17%	25%	21%	21%	21%	24%	24%	25%	25%	26%	20%
Picnic, barbeque, etc	20%	20%	21%	17%	19%	17%	20%	19%	22%	21%	22%	22%	18%	19%	20%	20%
Connecting with history	13%	10%	13%	14%	14%	11%	17%	10%	12%	11%	16%	14%	14%	13%	13%	10%
Connecting with culture	10%	8%	9%	11%	11%	8%	11%	12%	10%	11%	10%	10%	12%	7%	11%	8%
Boating / sailing	9%	9%	9%	10%	5%	8%	8%	8%	10%	10%	10%	9%	9%	8%	8%	7%
Climbing / mountaineering	7%	7%	6%	6%	6%	7%	8%	7%	6%	5%	6%	4%	9%	7%	7%	6%

Green / red indicates significantly higher / lower than previous month

Demographic differences (August)

Age:

New Zealanders aged 50–64** are less likely to go boating / sailing (1%).

New Zealanders aged 65+** are more likely to go on a short walk (60%) and less likely to go camping (2%).

Ethnicity:

Asians** are more likely to go climbing / mountaineering (15%).

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?

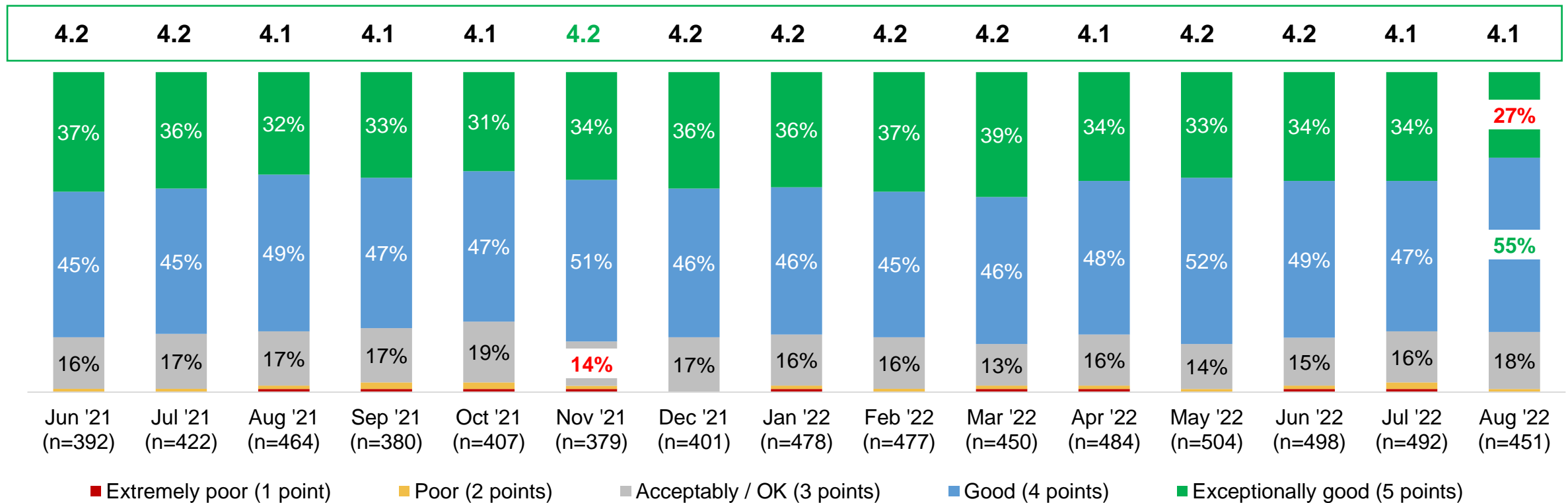
Base: Those who visited a Protected Natural Area in the last month. *Note: Only activities 6% and above for current month displayed. **Caution: Low base size (n<100), results indicative only.

VISIT SATISFACTION

'EXCEPTIONALLY GOOD' RATINGS FOR OVERALL EXPERIENCE AT PROTECTED NATURAL AREAS HAVE FALLEN WHILE 'GOOD' RATINGS HAVE RISEN.

Protected Natural Areas – Overall Experience

Mean Score

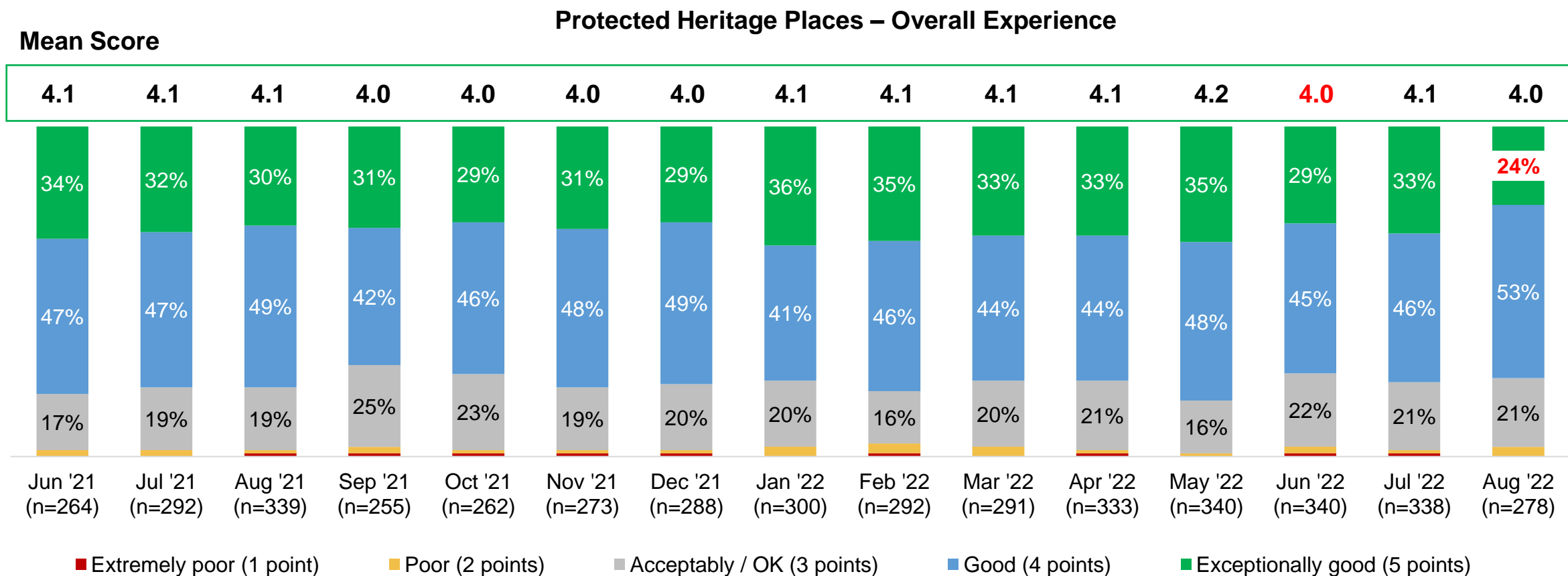


Green / red indicates significantly higher / lower than previous month

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

'EXCEPTIONALLY GOOD' RATINGS FOR OVERALL EXPERIENCE AT PROTECTED HERITAGE PLACES HAVE FALLEN.



Green / red indicates significantly higher / lower than previous month

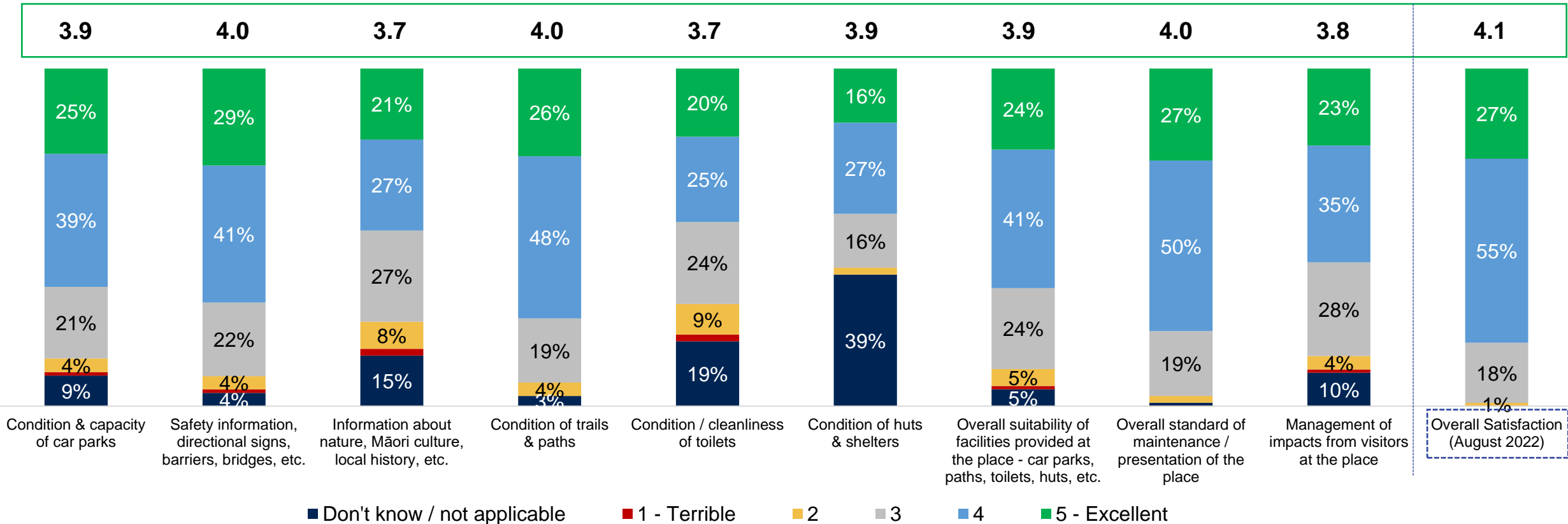
Q27: Overall, how would you rate your experience at <LOCATION SELECTED IN Q20>?

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

PNA VISITORS ARE GENERALLY SATISFIED, ALTHOUGH *INFORMATION ABOUT NATURE, ETC.* & *TOILETS* COULD BE IMPROVED.

Protected Natural Areas – Visitor Satisfaction**

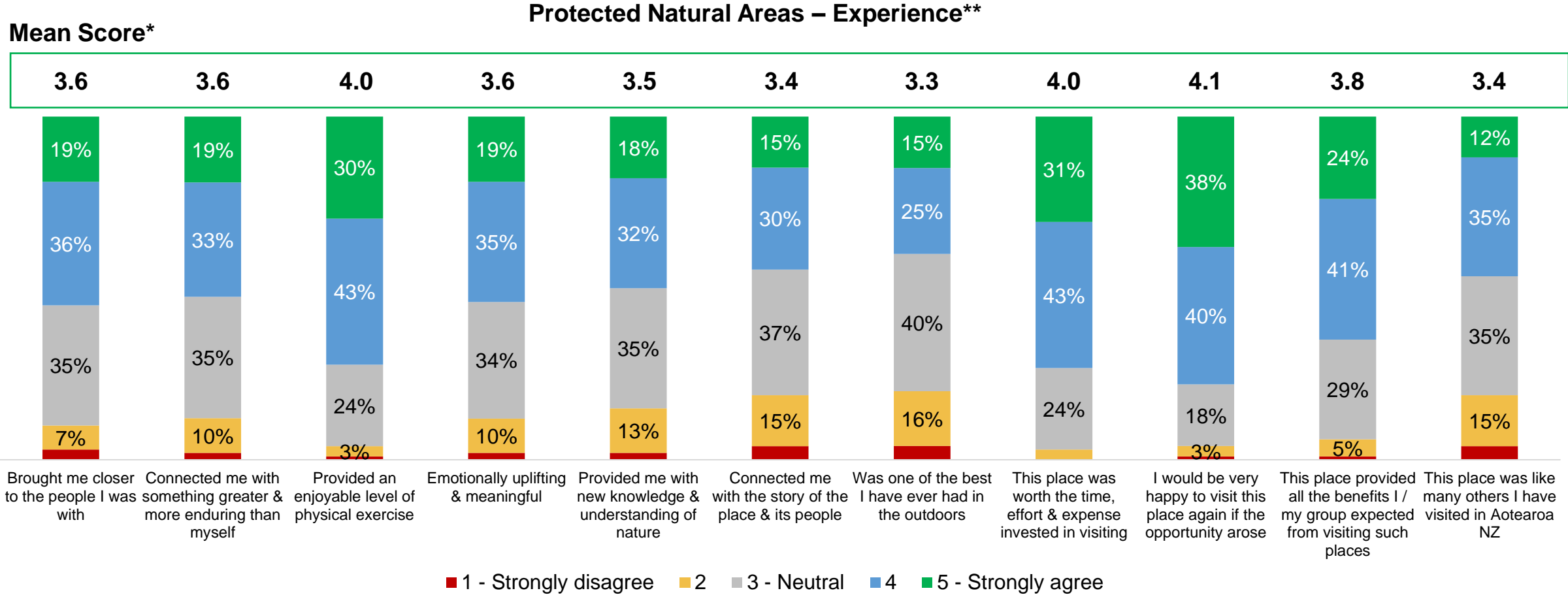
Mean Score*



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 (n=451). *Note: The mean score excludes 'Don't know / not applicable' responses. Higher mean scores are desirable. **Note: Future waves will track mean score results over time.

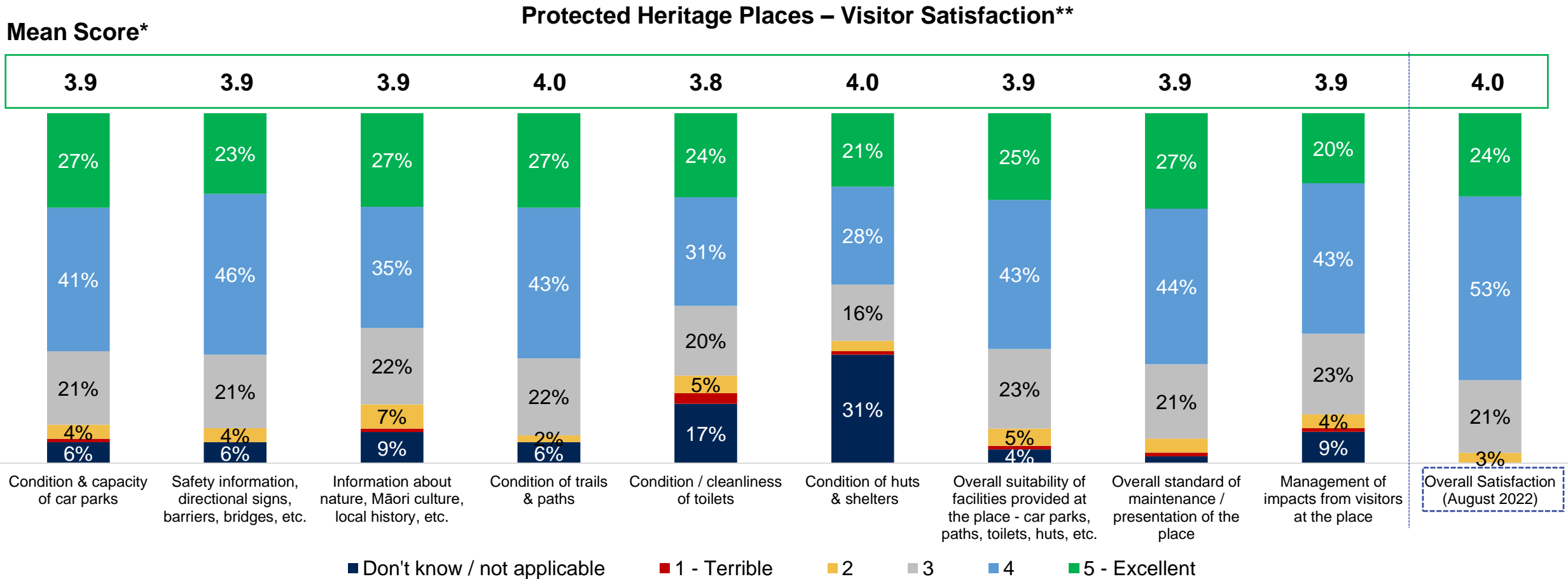
VISITORS TO PROTECTED NATURAL AREAS *WOULD BE VERY HAPPY TO COME BACK.*



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 (n=451). ***Note:** Higher mean scores are desirable. ****Note:** Future waves will track mean score results over time.



VISITORS TO PROTECTED HERITAGE PLACES ARE SATISFIED OVERALL.



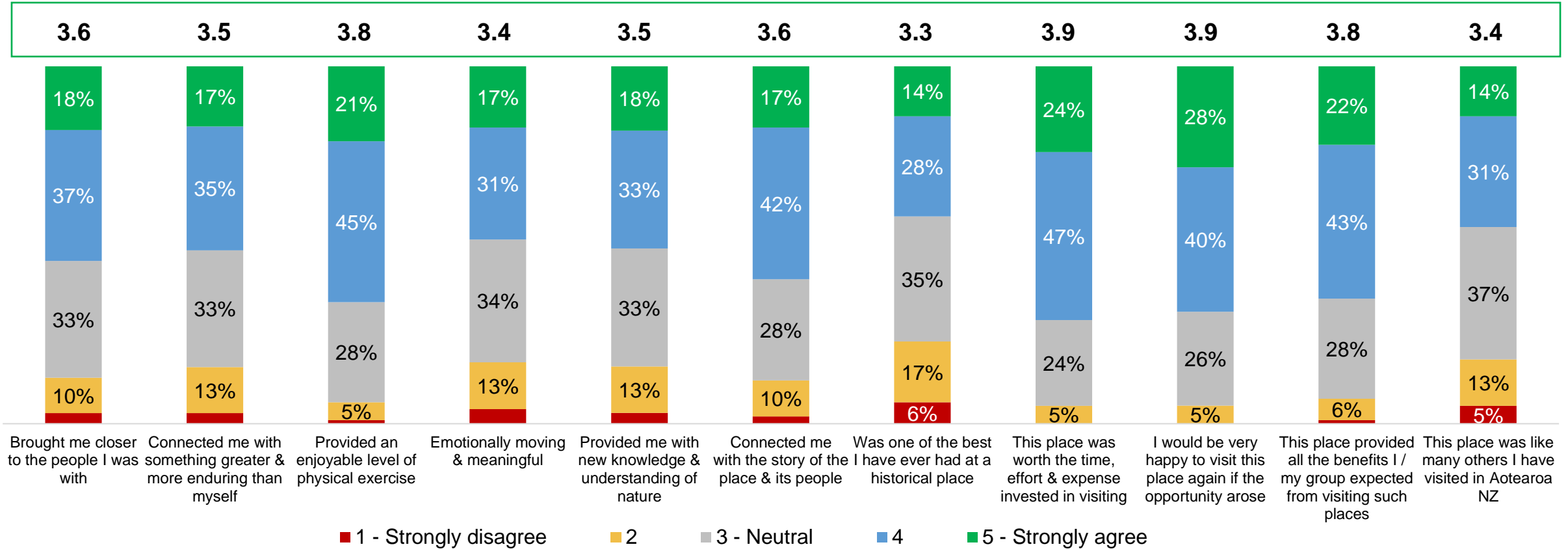
Q26a: Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how would you rate the following aspects listed below?

Base: Those who visited a Protected Heritage Place in the last month (n=278). *Note: The mean score excludes 'Don't know / not applicable' responses. Higher mean scores are desirable. **Note: Future waves will track mean score results over time.

MOST VISITORS AGREE OR ARE NEUTRAL ABOUT THEIR MOST RECENT EXPERIENCE AT A PROTECTED HERITAGE PLACE.

Protected Heritage Places – Experience**

Mean Score*



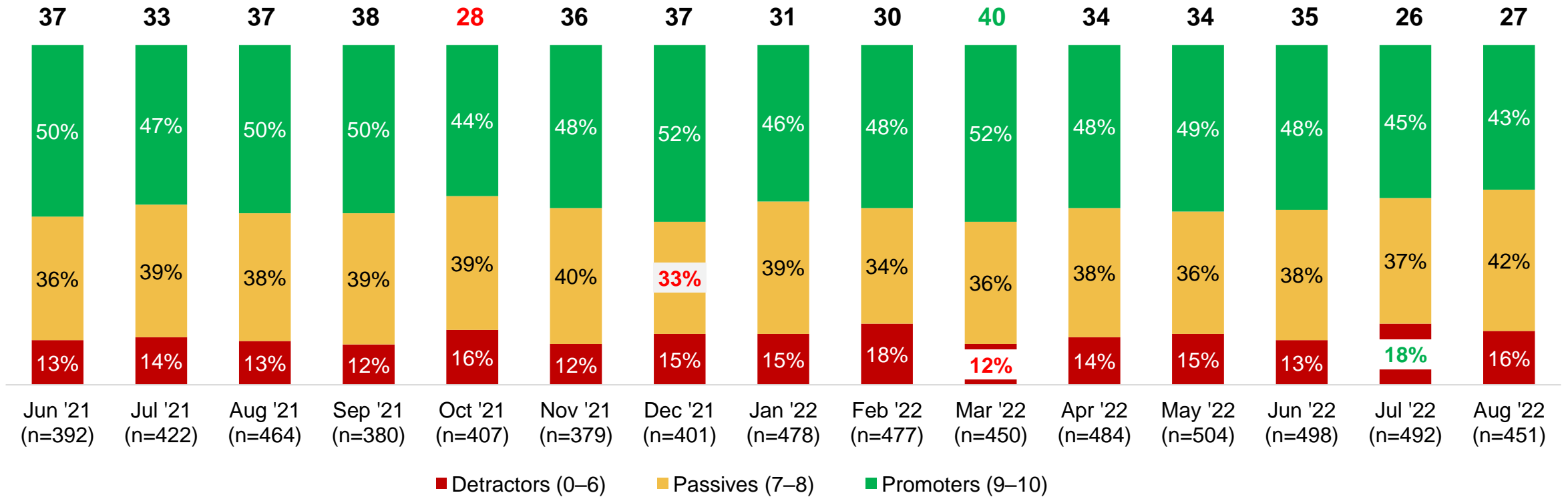
Q26b: Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how much do you agree or disagree with each of the statements below?

Base: Those who visited a Protected Heritage Place in the last month (n=278). *Note: Higher mean scores are desirable. **Note: Future waves will track mean score results over time.

NPS

PROTECTED NATURAL AREAS' NPS REMAINS AT THE LOWER LEVEL RECORDED IN JULY.

Protected Natural Areas – NPS



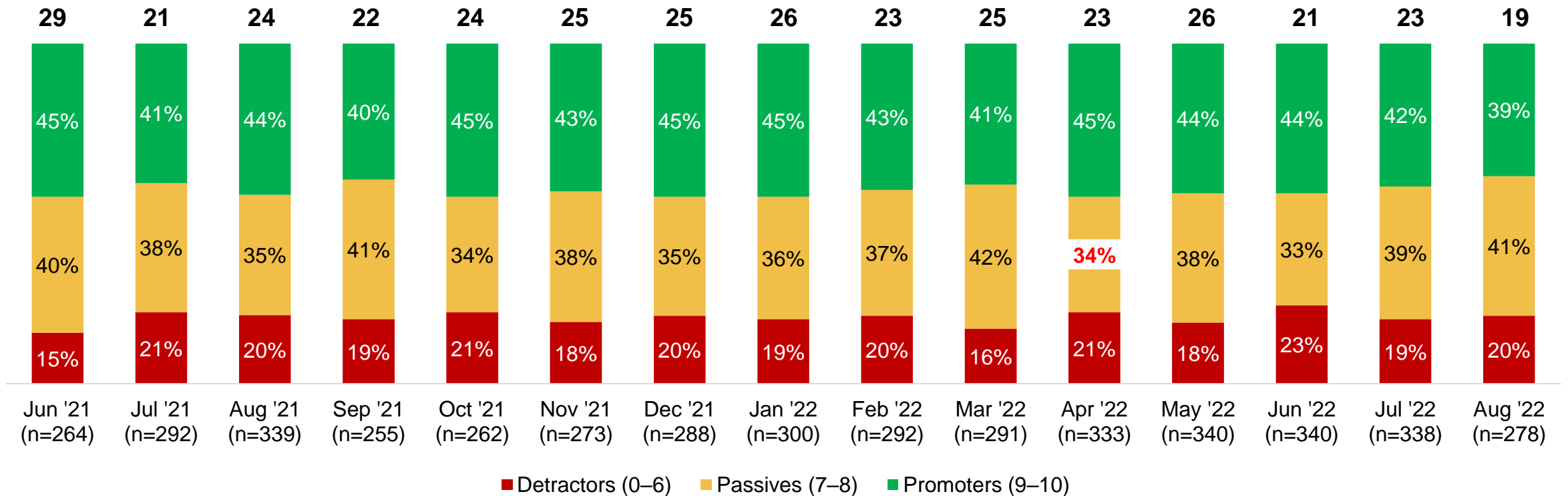
Green / red indicates significantly higher / lower than previous month

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 DECREASED TO ITS LOWEST LEVEL SINCE TRACKING BEGAN, DUE TO AN INCREASE IN PASSIVE RATINGS & A DECREASE IN PROMOTERS.

Protected Heritage Places – NPS



Green / red indicates significantly higher / lower than previous month

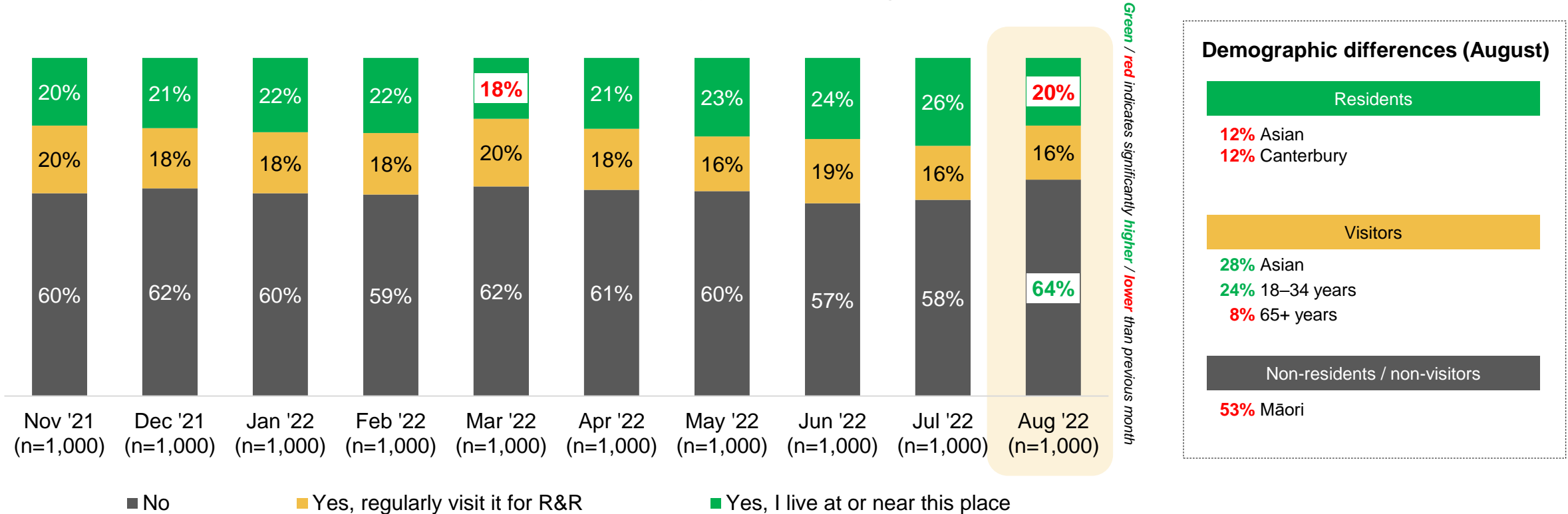
Q28: How LIKELY is it you would RECOMMEND <LOCATION SELECTED IN Q20> to your family or friends?

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

‘THRIVE’ MODULE

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?

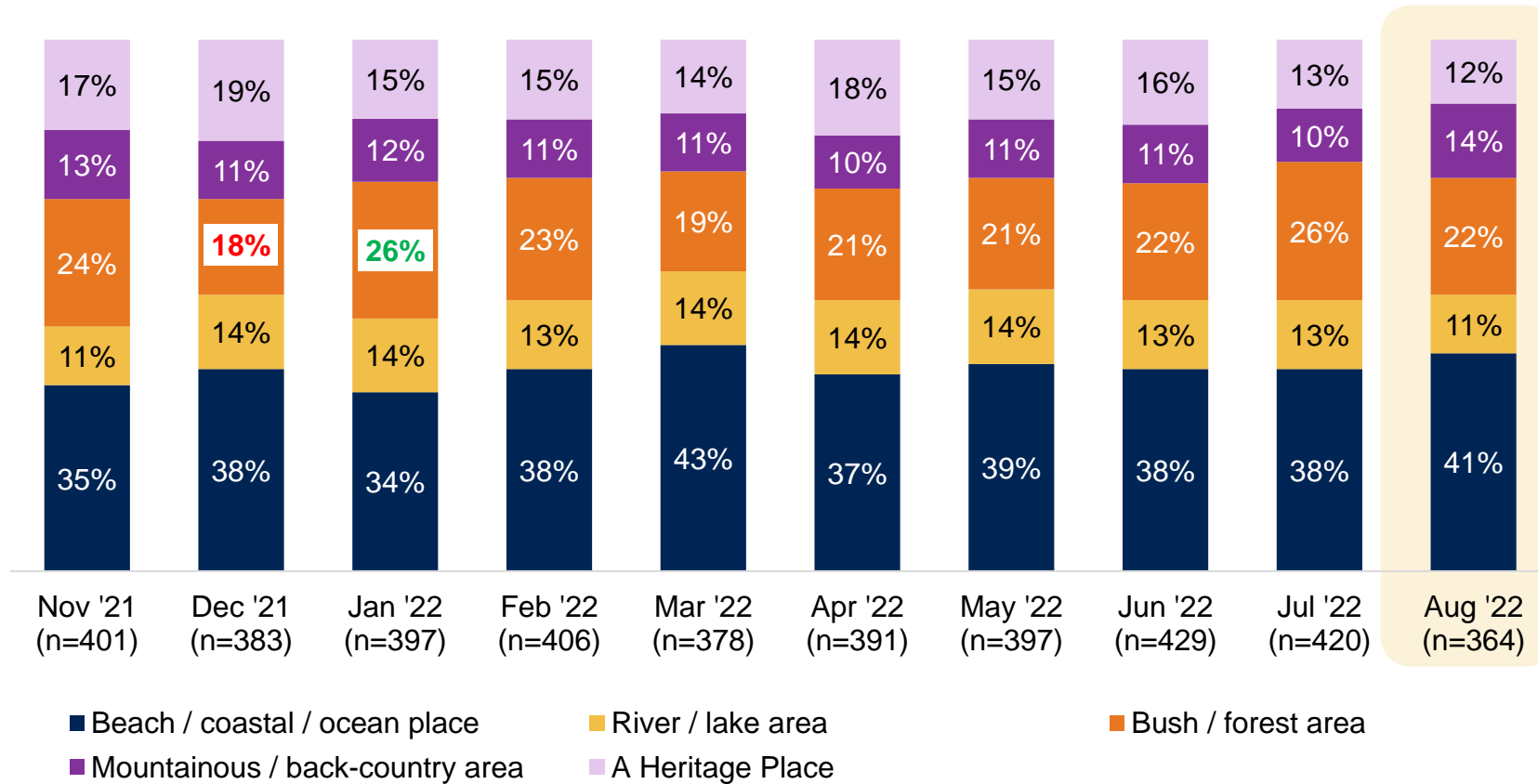


Q40: Is there a Protected Natural Area in New Zealand that is especially important to you? If there is more than one such place, please think about the place that is the MOST important to you.

Base: Total sample

THE PLACES THAT ARE IMPORTANT TO PEOPLE TEND TO BE CLOSE TO THE WATER.

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



Demographic profile (total n=3,966)

Beach / coastal area

- 46% Auckland
- 43% 50–64 years
- 30% Māori
- 25% Waikato

River / lake area

- 20% Waikato
- 19% Bay of Plenty
- 17% Canterbury
- 8% Auckland

Bush / forest

- 31% Wellington
- 30% Waikato
- 19% Auckland
- 17% Asian
- 12% Taranaki

Mountainous / back-country area

- 34% Taranaki
- 18% Otago
- 13% 18–34 years
- 9% Auckland

Protected Heritage Place

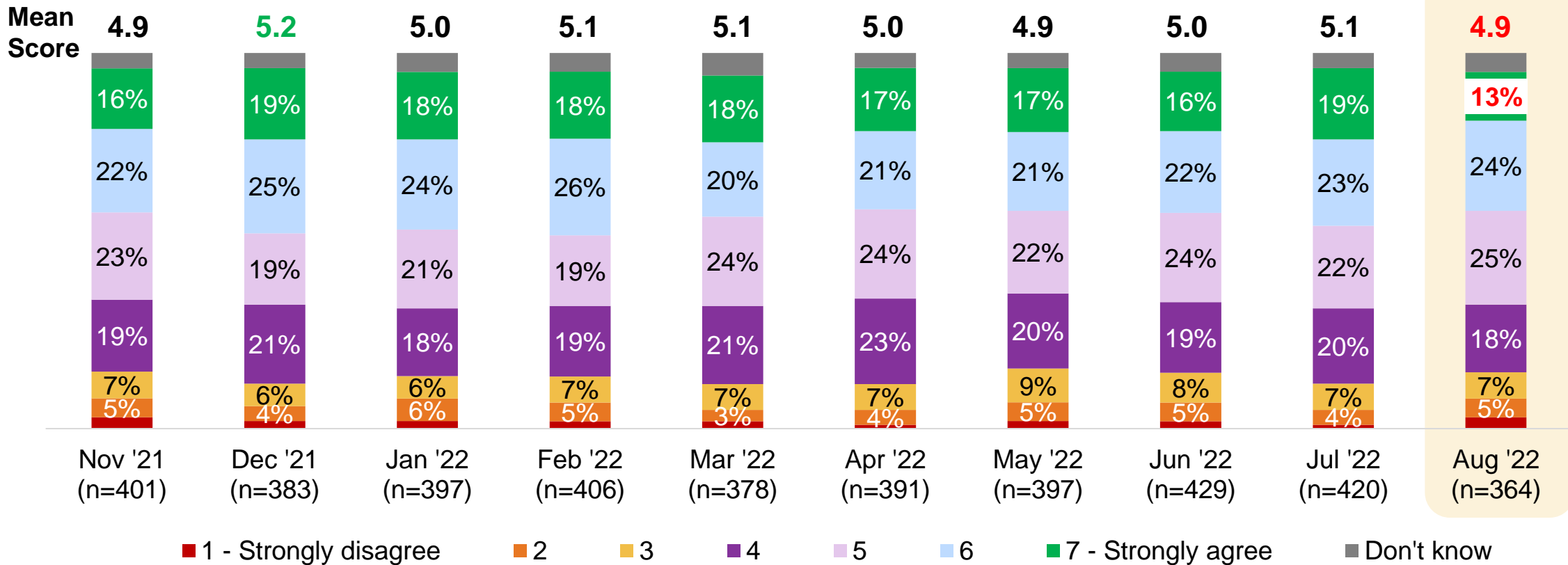
- 25% Māori
- 18% Auckland
- 14% European
- 11% Wellington
- 8% Otago

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?

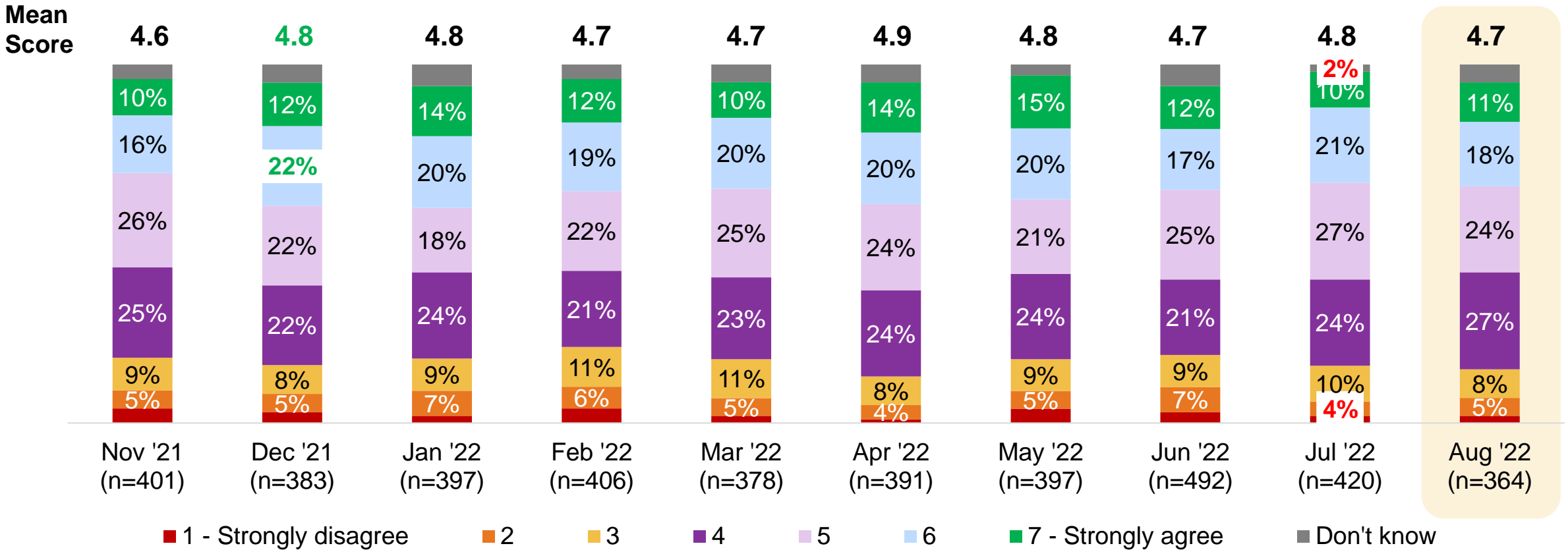
Base: Those who live near or regularly visit this place

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THERE IS STILL WIDE AGREEMENT THAT VISITORS IMPROVE THE QUALITY OF LIFE OF THE LOCAL COMMUNITIES.

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



Green / red indicates significantly higher / lower than previous month

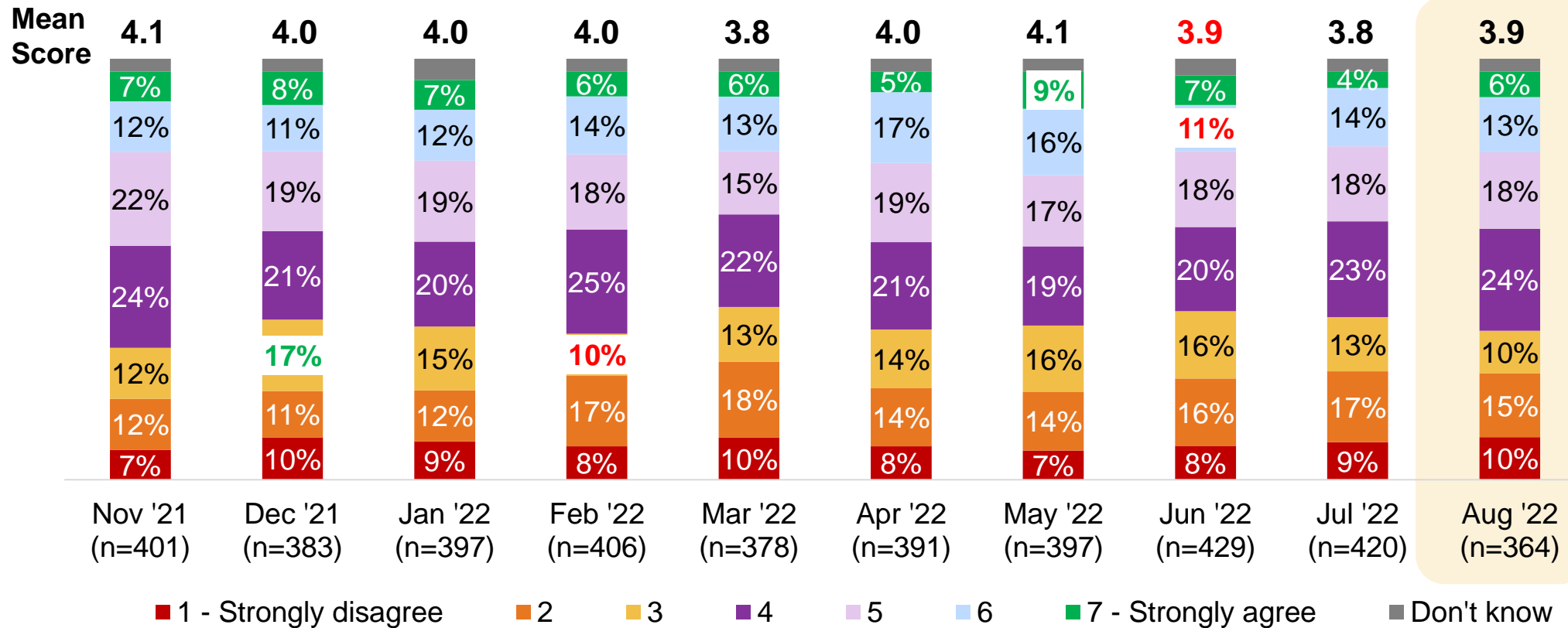
Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place

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THE PERCEIVED INCIDENCE OF VISITOR-CREATED DAMAGE TO THE AREA HAS REMAINED STABLE THIS MONTH DESPITE CONTINUED DECREASES IN VISITATION

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



Mean score demographic differences (August)*
 18–34 years (4.3)
 65+ years** (3.3)

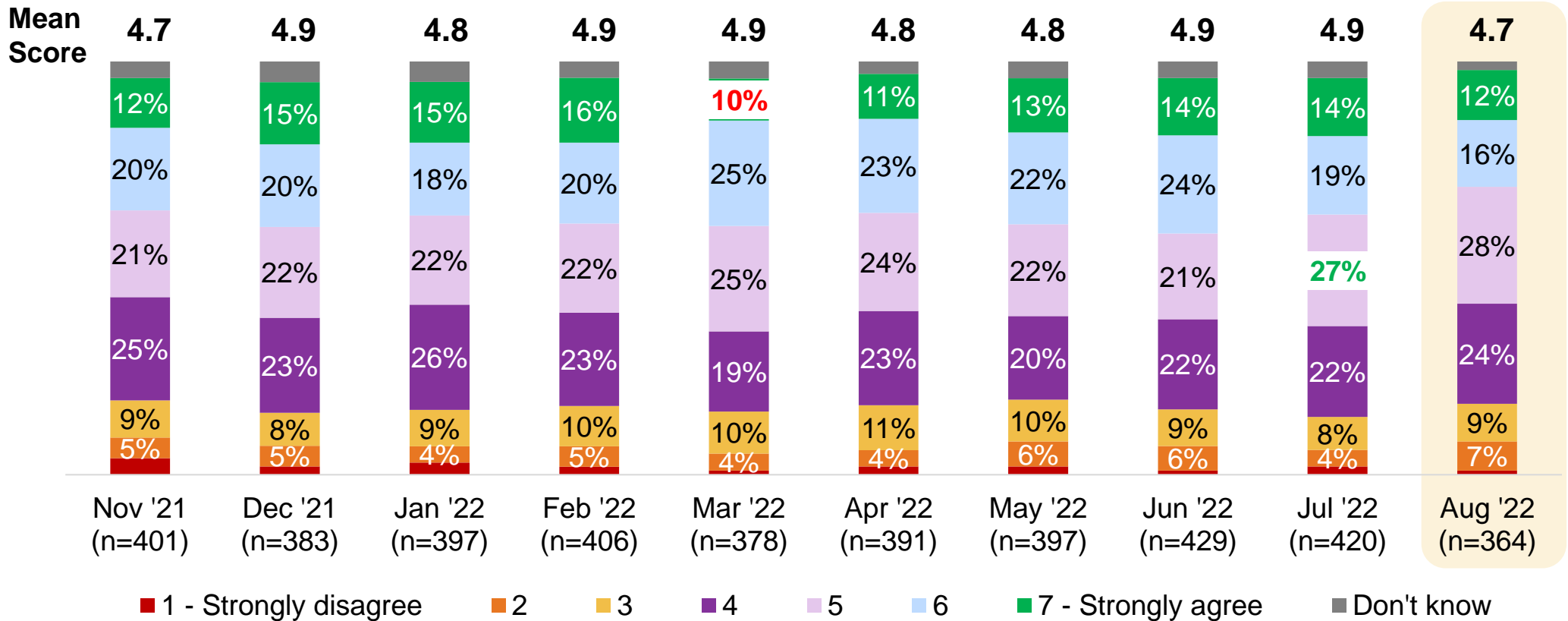
Green / red indicates significantly higher / lower than previous month

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.

SOME DISQUIET IS STARTING TO APPEAR REGARDING VISITORS' ROLE IN HELPING ENSURE AREAS ARE PROTECTED & IMPROVED.

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



Mean score demographic differences (August)*
65+ years** (5.2)

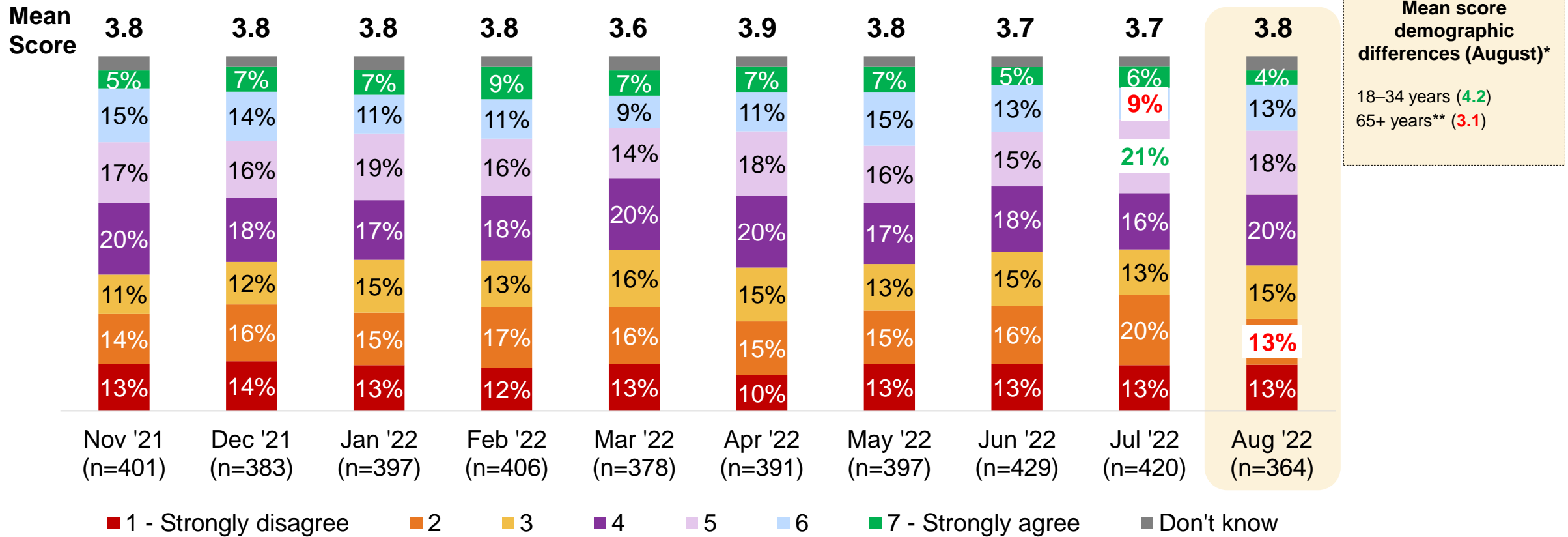
Green / red indicates significantly higher / lower than previous month

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”

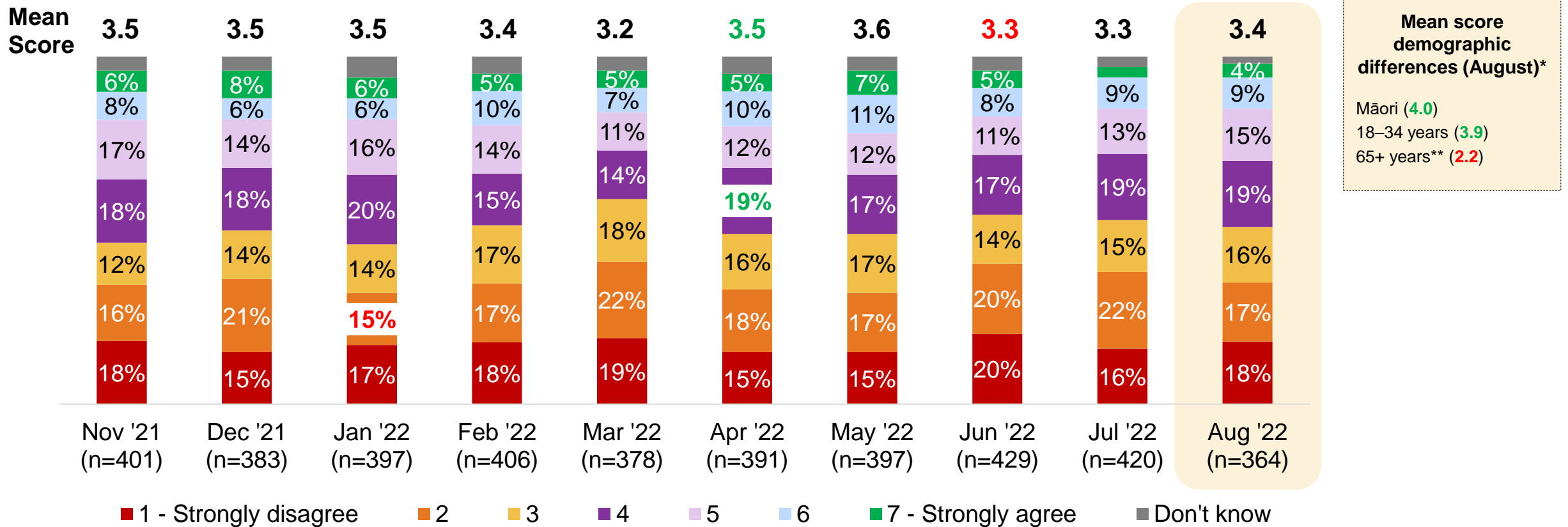


Q42: How much do you agree or disagree with each of the following statements?

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

VISITORS / RESIDENTS GENERALLY DISAGREE THAT VISITORS WEAKEN LOCAL TRADITIONS & CULTURES.

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

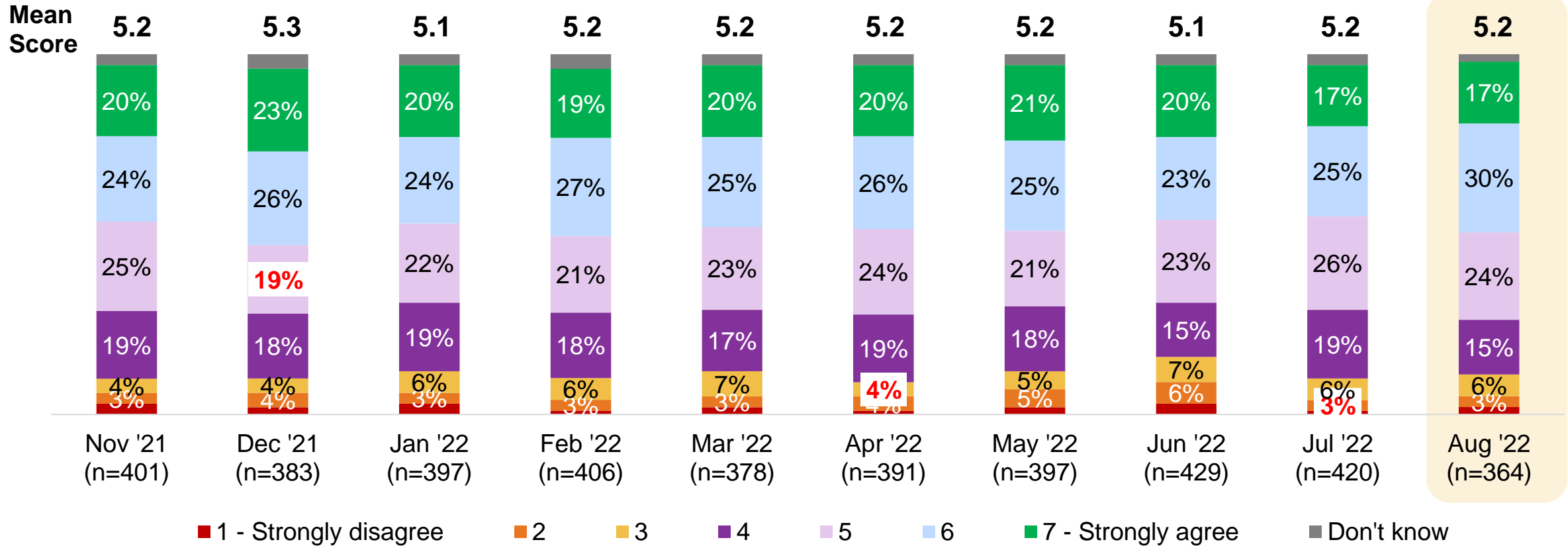


Q42: How much do you agree or disagree with each of the following statements?

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 CONTINUE TO 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

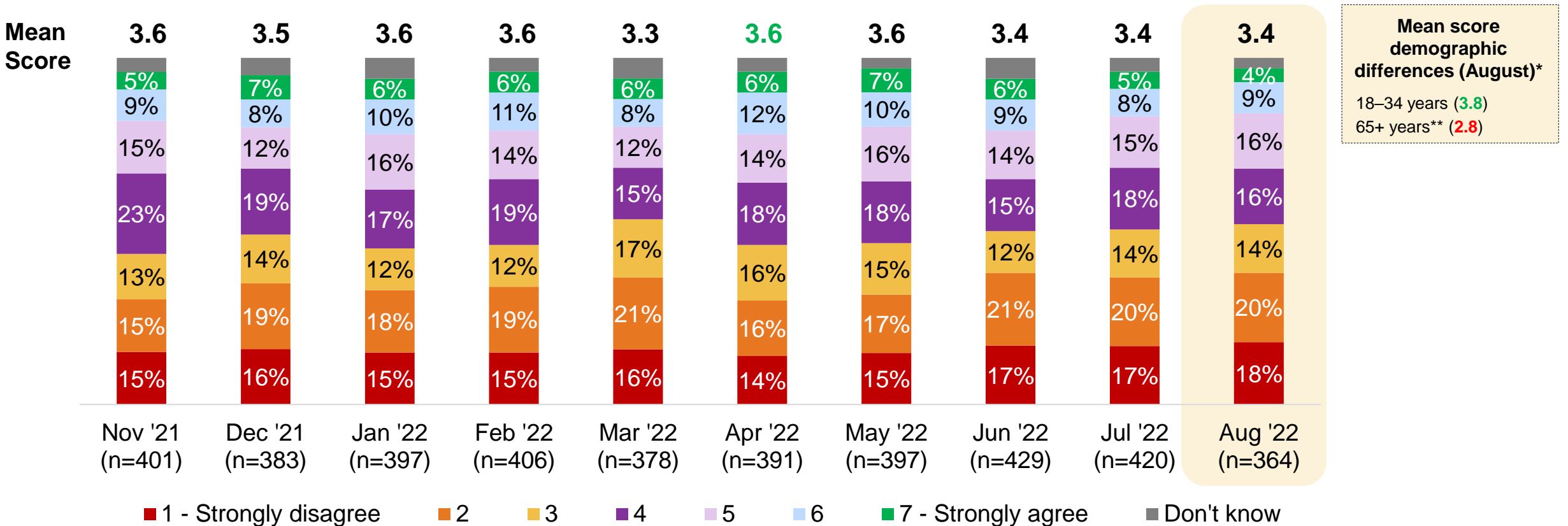
Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place

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MOST 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”



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=	1,448	489	831	429	587
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	5.0	5.1	4.9	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	5.0	4.6	4.8	4.8
	AVERAGE AGREEMENT WITH POSITIVE STATEMENTS (higher numbers are better)	4.9	5.0	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	3.9	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

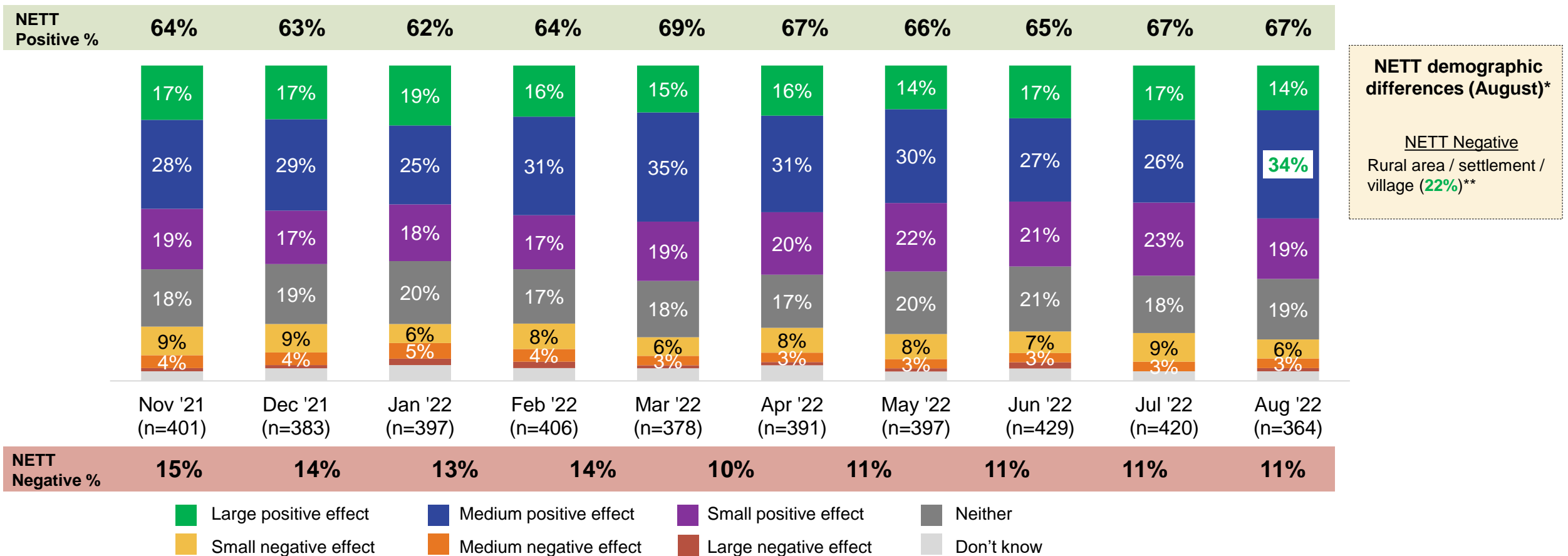
Green / red indicates significantly higher / lower than total

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 CONTINUE TO 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.

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GAME CHANGERS

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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.

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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**

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