

# DOC PUBLIC PULSE OF CONSERVATION

March 2023 Topline Report for February 2023 Activity

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24 March 2023



GAME CHANGERS



# KEY FINDINGS – MARCH '23

## (COVERING FEBRUARY '23 ACTIVITY)

- Visitation to both Protected Natural Areas (44% vs. 48% for January activity) and Heritage Places (27% vs. 31%) has significantly decreased this month.
- Average visits to Protected Areas is now at an all-time low since tracking began (1.1 vs. 1.9 in Sept 2021).
- Satisfaction with the overall experience at Protected Natural Areas has significantly decreased this month also, following a significant increase in February; it now sits at 4.1 (mean score out of 5) compared to 4.2 during the January activity period. Meanwhile satisfaction with the overall experience at Protected Heritage Places remained stable this month.
- Protected Natural Areas' NPS has significantly decreased, now at 28. Protected Natural Areas' NPS is now 12-points lower than in March 2022 when it was at 40.
- Protected Heritage Places' NPS, now at 11, continues to decrease and remains much lower than for the 12 months preceding the substantial decline that began in September. Compared to March 2022 (25), NPS is now 14-points lower than it was at that time.
- Measures of personal experience at Protected Heritage Places have softened across the board this month, with all measures down.
- This month, significantly fewer people recalled DOC content. Of recalled content, most concerned *climate change issues, predator / pest control, and Great Walks.*




# SUMMARY

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


# BACKGROUND & METHODOLOGY

Note this fieldwork concluded just before the worst of Cyclone Gabrelle and focussed on 'the previous 4 weeks'. Therefore Cyclone Gabrelle did not influence the results but did include the period of the Auckland floods of January 27 and the wettest upper North Island January in decades.



**Sample size**

**1,000**




**Fieldwork dates**  
March 6-16, 2023

**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

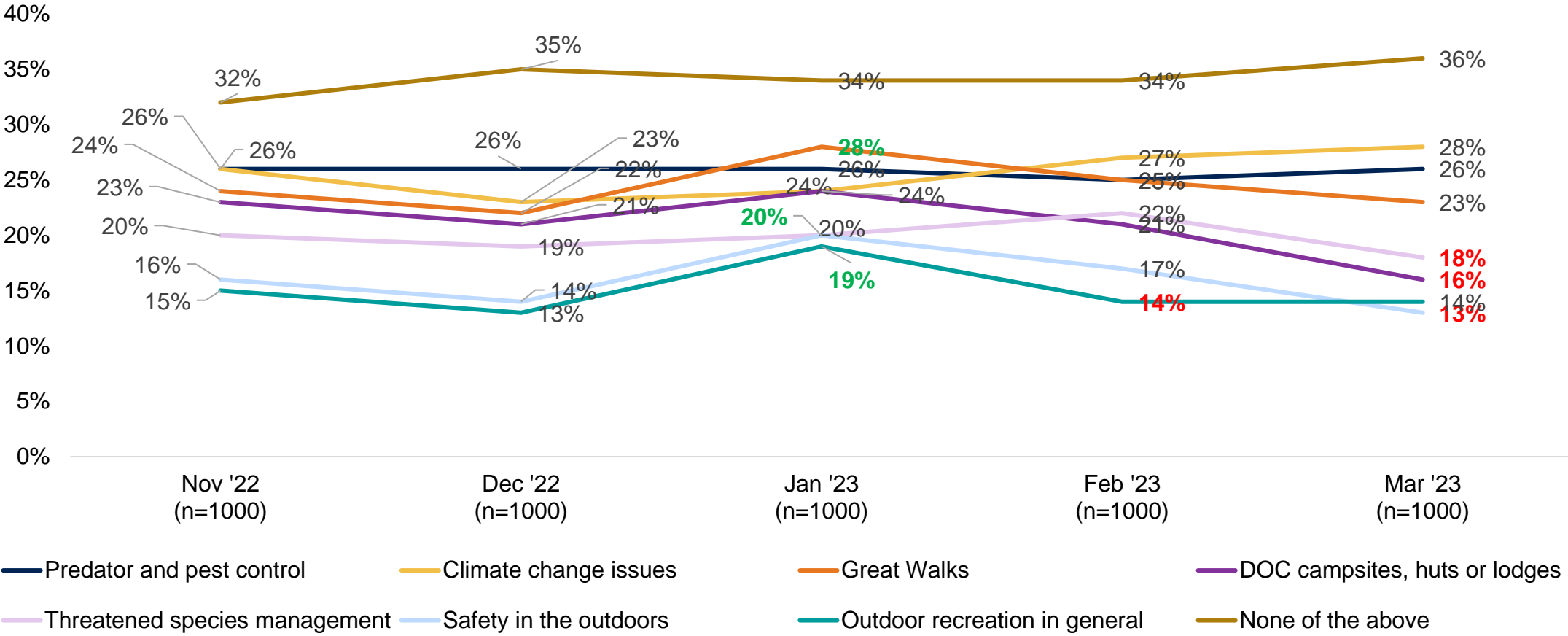
Sep 21	3–9 September, 2021
Oct 21	1–7 October, 2021
Nov 21	5–12 November, 2021
Dec 21	3–9 December, 2021
Jan 22	6–15 January, 2022
Feb 22	5–15 February, 2022
Mar 22	3–10 March, 2022
Apr 22	1–11 April, 2022
May 22	5–16 May, 2022
Jun 22	3–11 June, 2022
Jul 22	4–13 July, 2022
Aug 22	15-24 August, 2022
Sep 22	7-17 September, 2022
Oct 22	5-17 October, 2022
Nov 22	7-21 November, 2022
Dec 22	5-19 December, 2022
Jan 23	9-17 January, 2023
Feb 23	7-15 February, 2023

# DOC MEDIA PROFILE



This month, significantly fewer people recalled DOC content. Of recalled content, most concerned *climate change issues, predator / pest control, and Great Walks*.

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



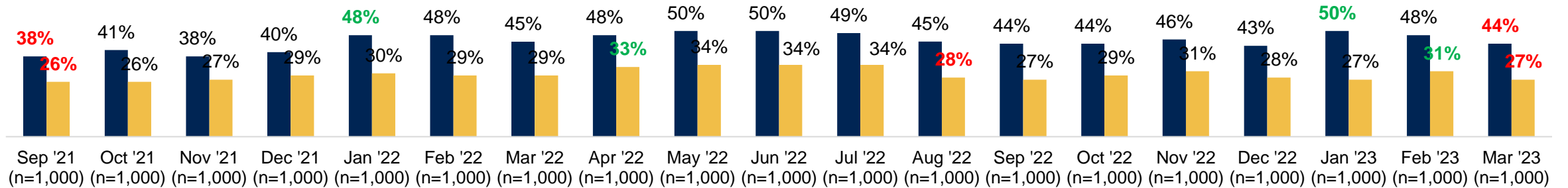
Q50: Which, if any, of the following aspects of the Department of Conservation have you seen, read, or heard about in the past 4 weeks? \*Note: Top-8 responses are shown.



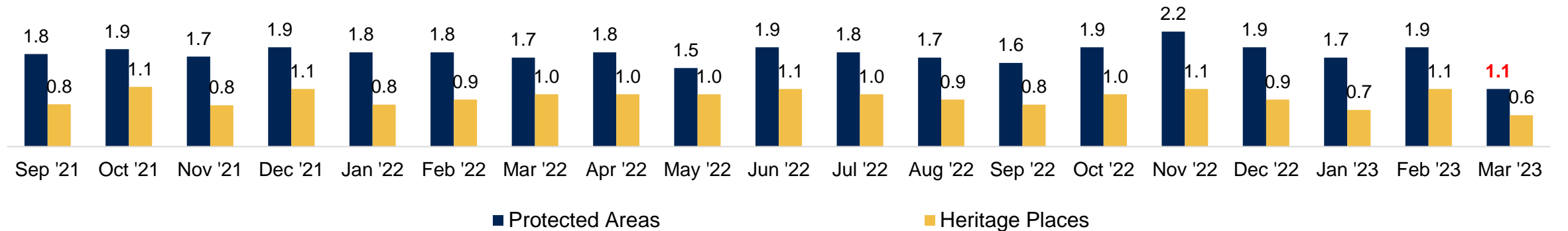
# VISITATION FREQUENCY

Visitation to both Protected Natural Areas and Heritage Places significantly decreased in the February period. Average visitation to Protected Areas was the lowest since tracking began.

### 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\*

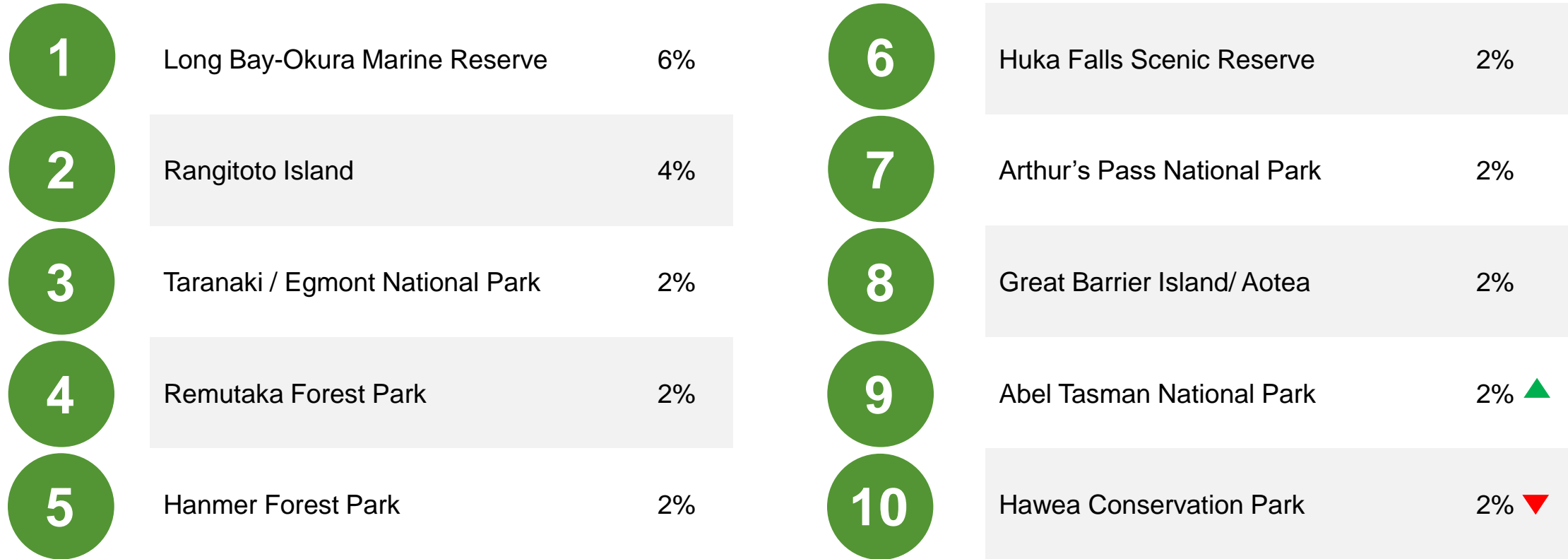


Green / red indicates significantly higher / lower than previous month

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.



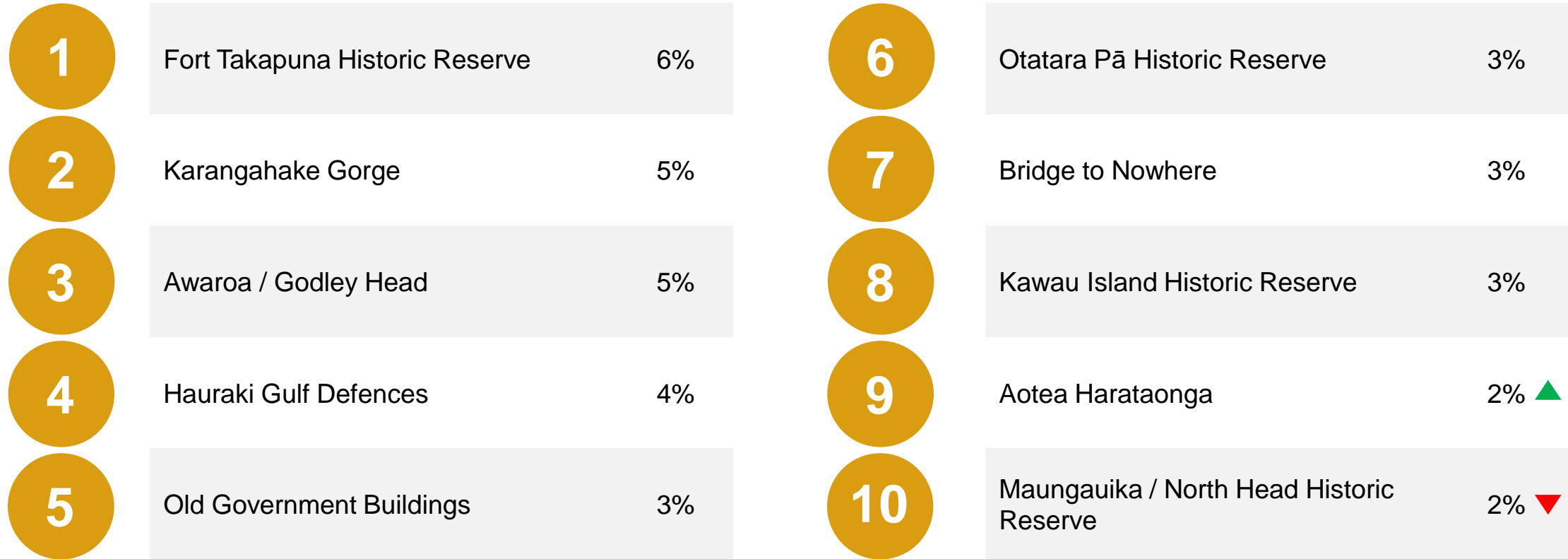
# TOP-10 PROTECTED NATURAL AREAS VISITED: JUN 2021–MAR 2023.



**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=9,874)

# TOP-10 PROTECTED HERITAGE PLACES VISITED: JUN 2021–MAR 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=6,500)

The number of people saying they are *connecting with history* significantly decreased compared to last month, As have *swimming* and *camping*, which reflects the cooling of the weather as New Zealand moves into Autumn.

## Top activities when visiting Protected Natural Areas\*

	Total	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	Feb'23	Mar'23
Base (n=)	8,957	422	464	380	407	379	401	478	477	450	484	504	498	492	451	436	442	465	433	497	482	435
Short walk (<3 hours)	39%	38%	36%	38%	35%	33%	33%	41%	33%	41%	38%	38%	38%	38%	44%	42%	40%	41%	41%	44%	41%	43%
Sightseeing	30%	28%	29%	32%	29%	29%	24%	31%	27%	30%	30%	32%	31%	30%	35%	34%	28%	31%	27%	32%	34%	28%
Photography	25%	29%	26%	26%	21%	22%	21%	24%	24%	27%	24%	25%	24%	25%	26%	26%	26%	27%	26%	28%	27%	26%
Bird / wildlife watching	25%	27%	28%	24%	26%	26%	24%	22%	20%	24%	25%	24%	24%	25%	26%	24%	24%	24%	27%	25%	26%	24%
Connecting with nature	23%	21%	25%	22%	17%	25%	21%	21%	21%	24%	24%	25%	25%	26%	20%	22%	25%	22%	21%	25%	25%	23%
Day walk / hike (>3 hours but not overnight)	23%	25%	23%	26%	21%	25%	26%	22%	21%	20%	24%	21%	26%	21%	23%	23%	23%	21%	25%	19%	25%	23%
Picnic, barbeque, etc	20%	21%	17%	19%	17%	20%	19%	22%	21%	22%	22%	18%	19%	20%	20%	21%	21%	20%	22%	23%	20%	20%
Connecting with history	13%	13%	14%	14%	11%	17%	10%	12%	11%	16%	14%	14%	13%	13%	10%	13%	17%	15%	15%	13%	16%	11%
Connecting with culture	10%	9%	11%	11%	8%	11%	12%	10%	11%	10%	10%	12%	7%	11%	8%	8%	13%	11%	10%	10%	11%	10%
Swimming in a lake/river/sea	9%	6%	7%	5%	4%	5%	11%	18%	14%	16%	11%	10%	6%	7%	5%	6%	7%	9%	8%	16%	17%	9%
Camping	12%	14%	12%	14%	14%	14%	12%	16%	14%	13%	12%	11%	11%	11%	11%	8%	10%	11%	11%	12%	13%	8%

Green / red indicates significantly higher / lower than previous month

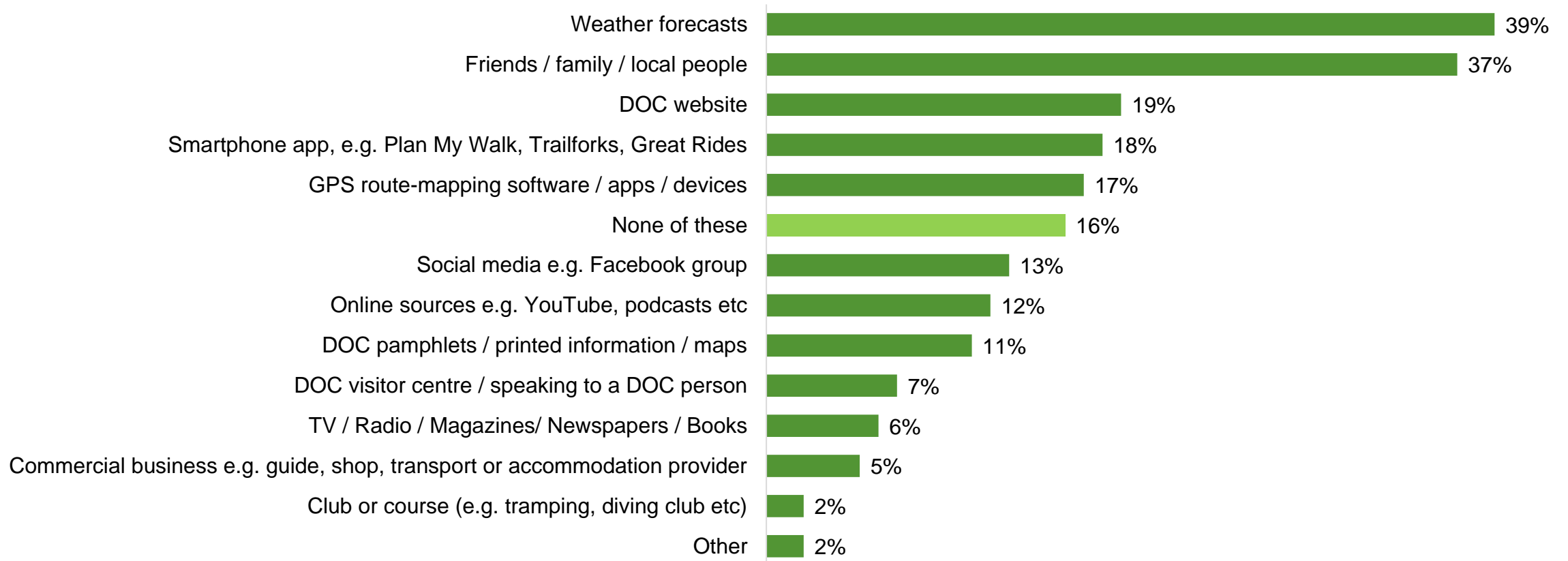
Q12: Thinking about your most recent visit to <LOCATION SELECTED IN Q8>, which of the following activities did you engage in?

Base: Those who visited a Protected Natural Area in the last month. \*Note: Top-12 responses 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.

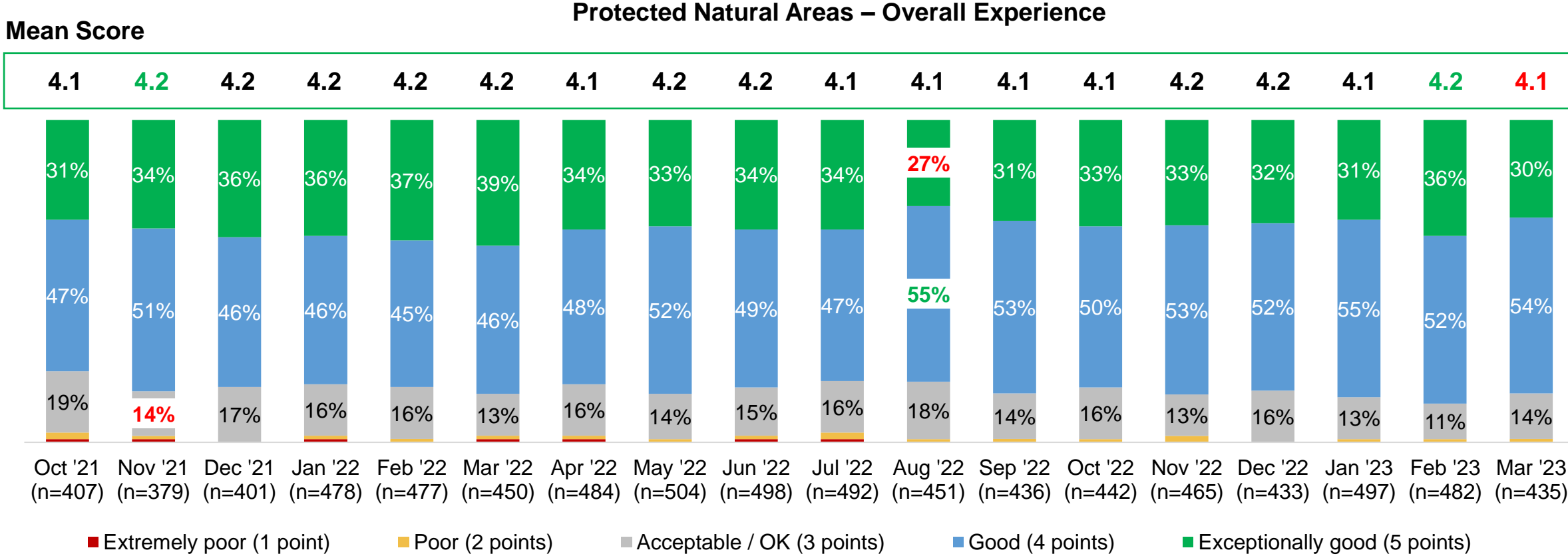
## Sources of Information used for Planning



**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=2,312)

Satisfaction with the *overall experience* at Protected Natural Areas significantly decreased this month, following a significant increase in February.



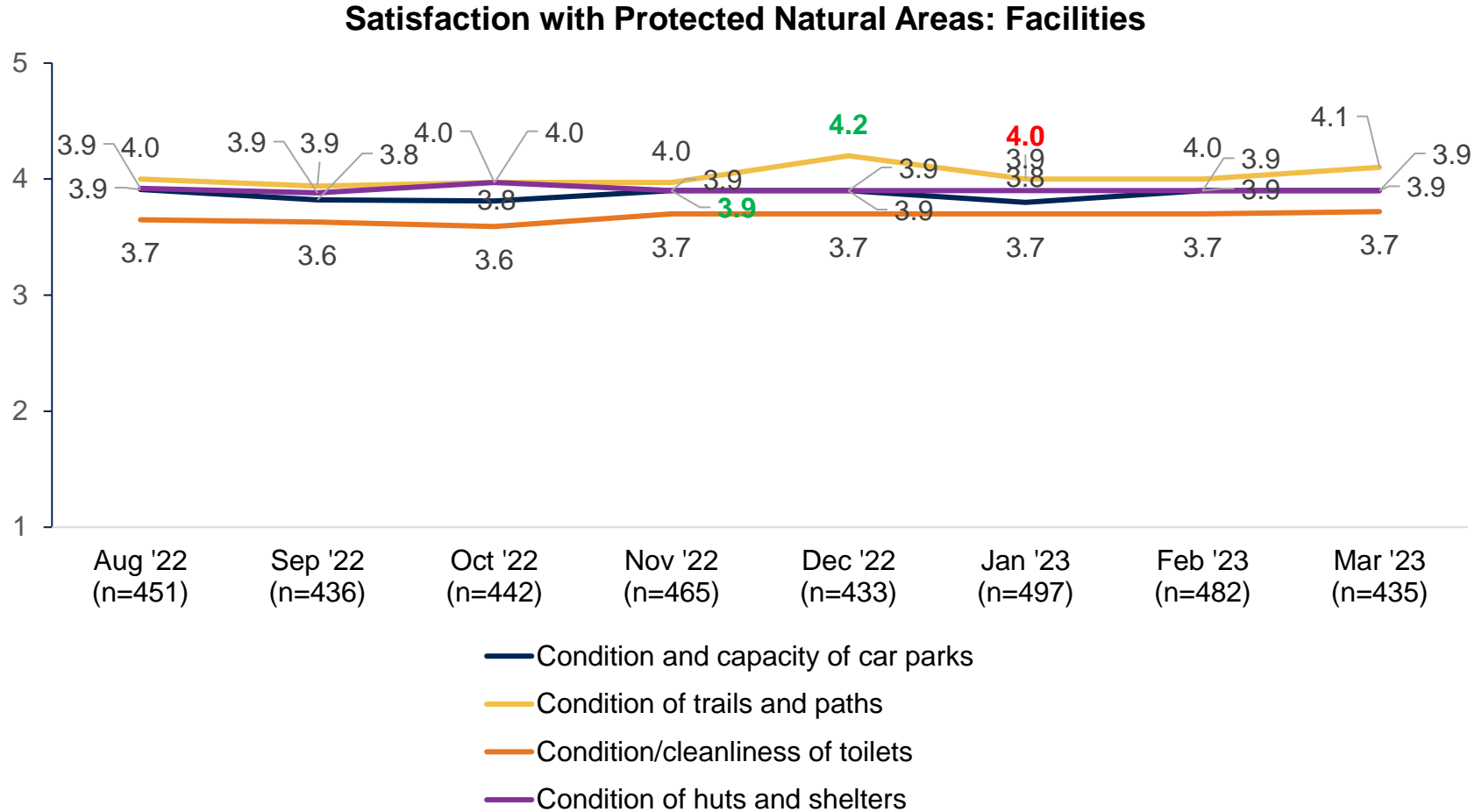
Green / red indicates significantly higher / lower than previous month

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



# Visitors' satisfaction with the *condition of trails and paths* improved, while satisfaction with other facilities' conditions remains stable.

5=Excellent\*  
 ↑  
 Mean scores  
 ↓  
 1=Terrible

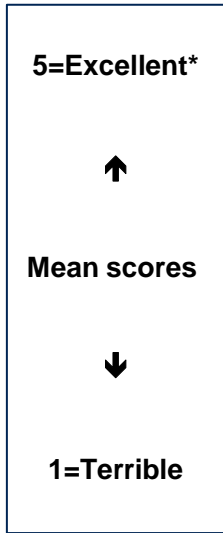


Green / red indicates significantly higher / lower than previous month

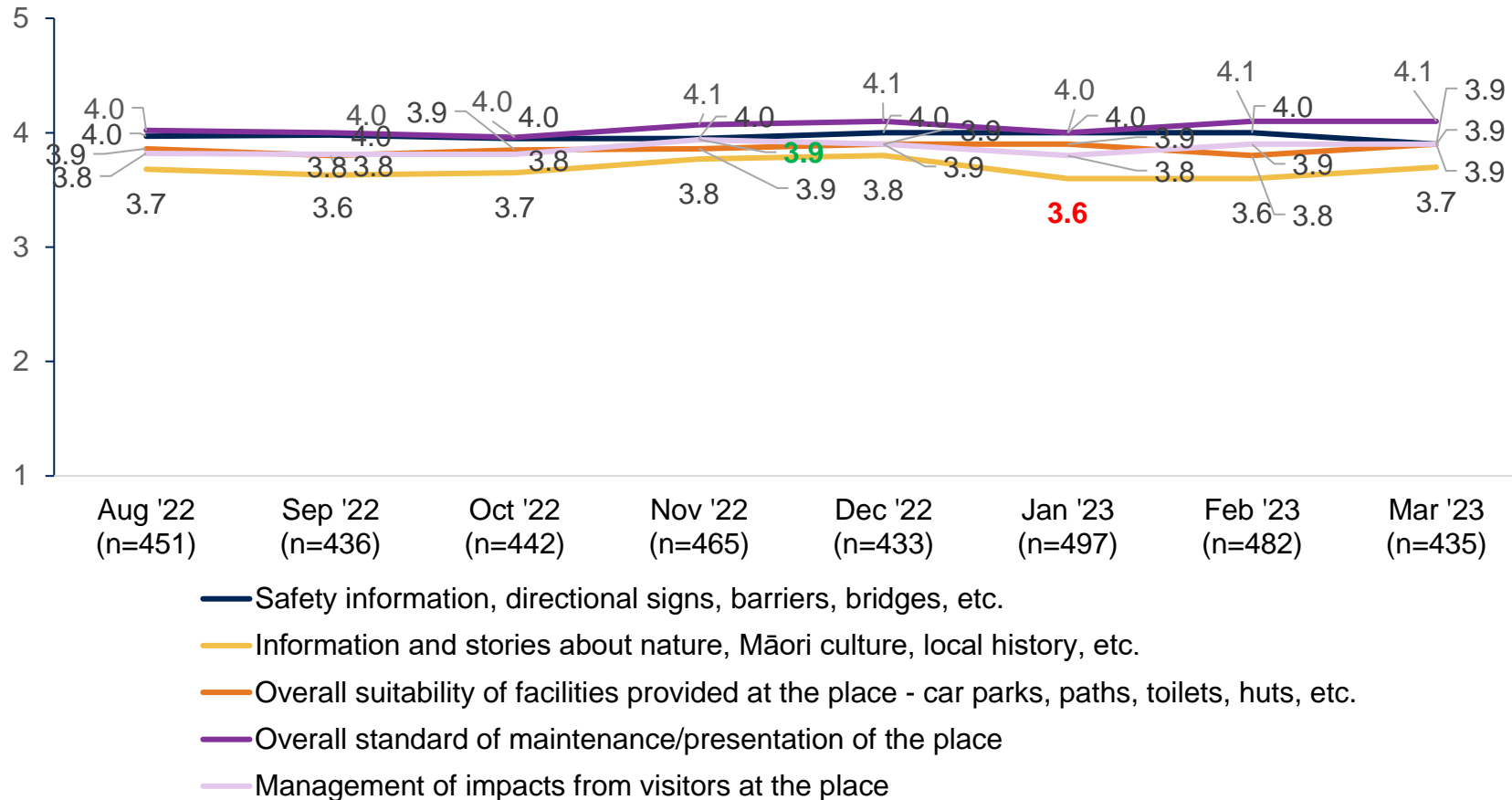
Q14a: Still thinking about your most recent visit to <LOCATION SELECTED IN Q8>, how would you rate the following aspects listed below?

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 *signage and maintenance* remains fairly high.



### Satisfaction with Protected Natural Areas: Signage and Maintenance



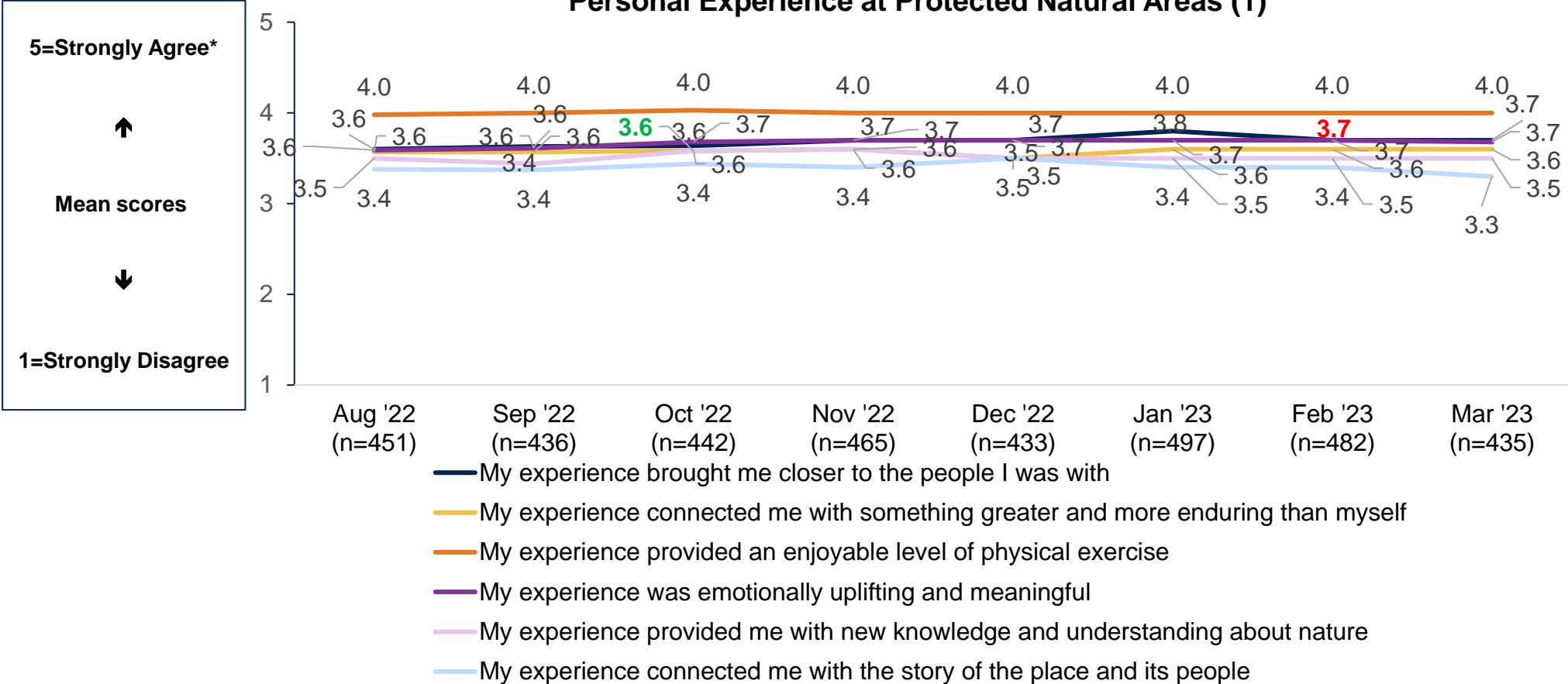
Q14a: Still thinking about your most recent visit to <LOCATION SELECTED IN Q8>, how would you rate the following aspects listed below?

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.



This month, there remains a lower number of people who agree that their experience at Protected Natural Areas *connected them with the story of the place and its people*.

Personal Experience at Protected Natural Areas (1)



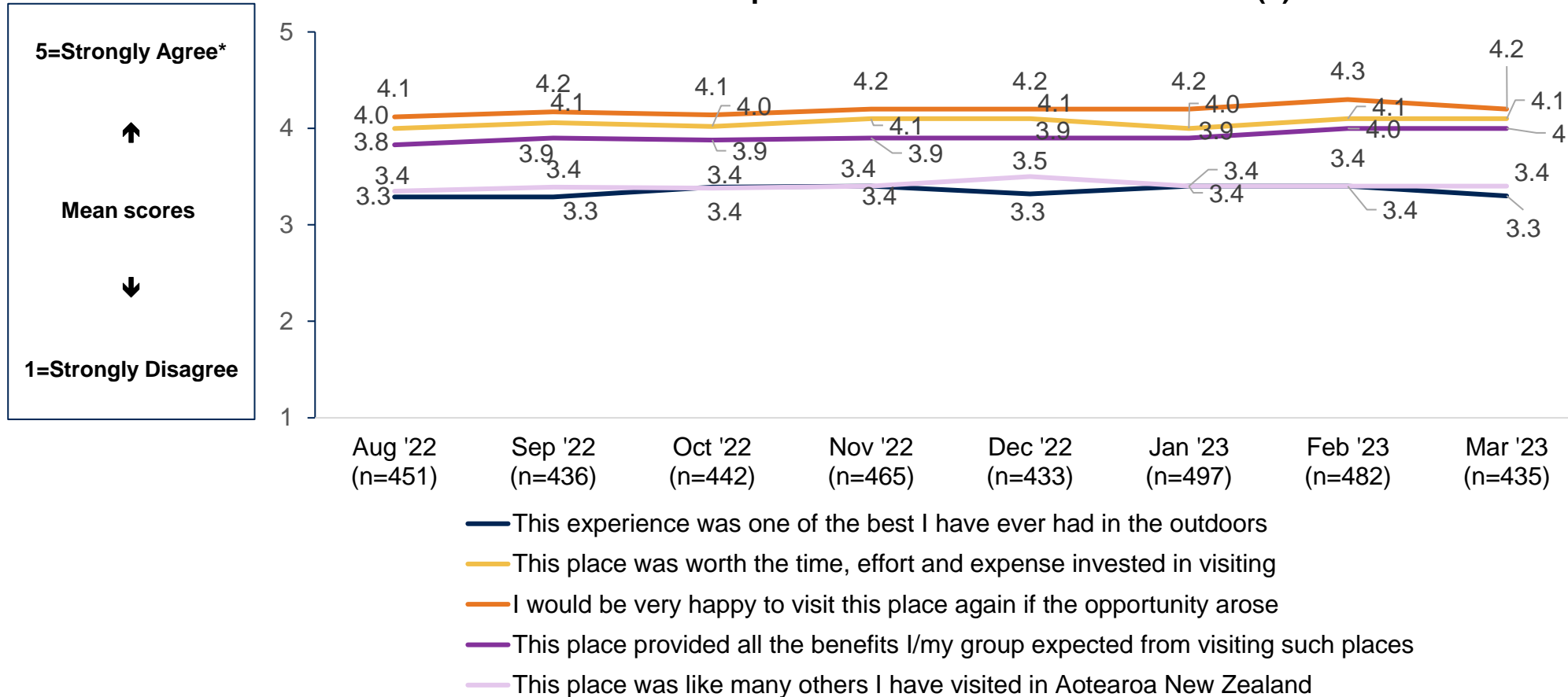
Green / red indicates significantly higher / lower than previous month

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.

This month, the quality of personal experience at Protected Natural Areas remained fairly high.

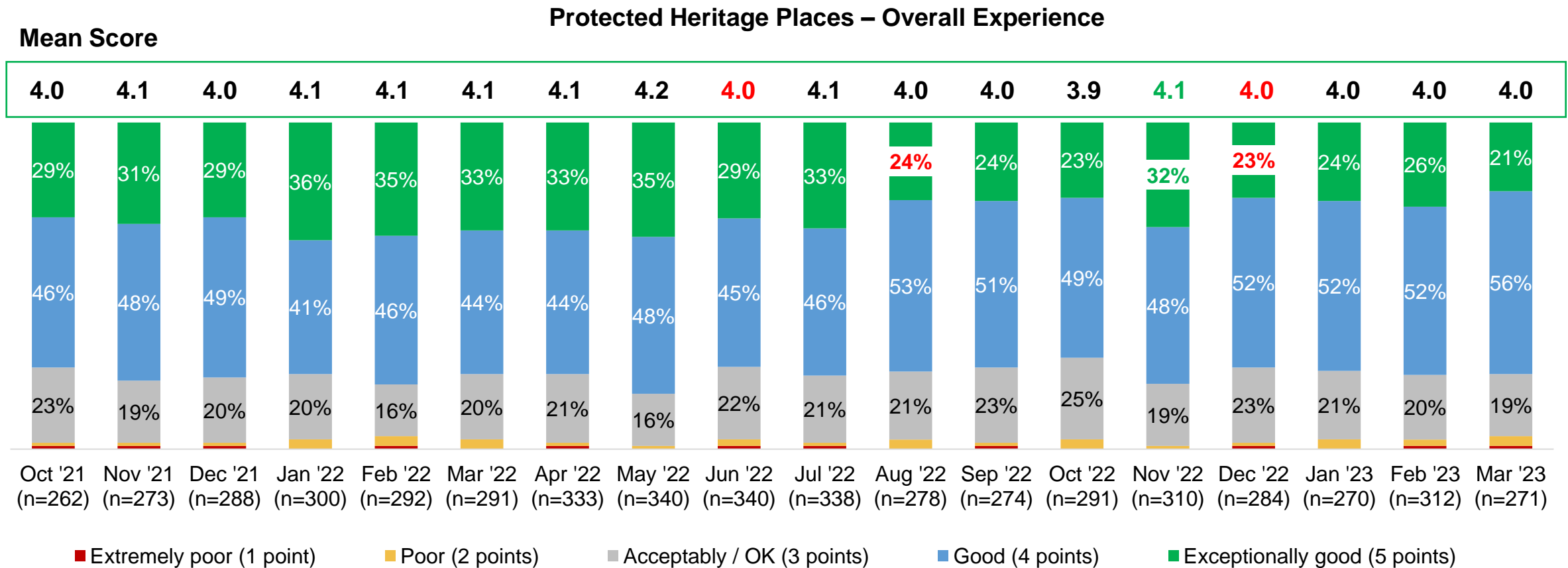
Personal Experience at Protected Natural Areas (2)



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 with similar levels since December, though lower when compared to a year ago.

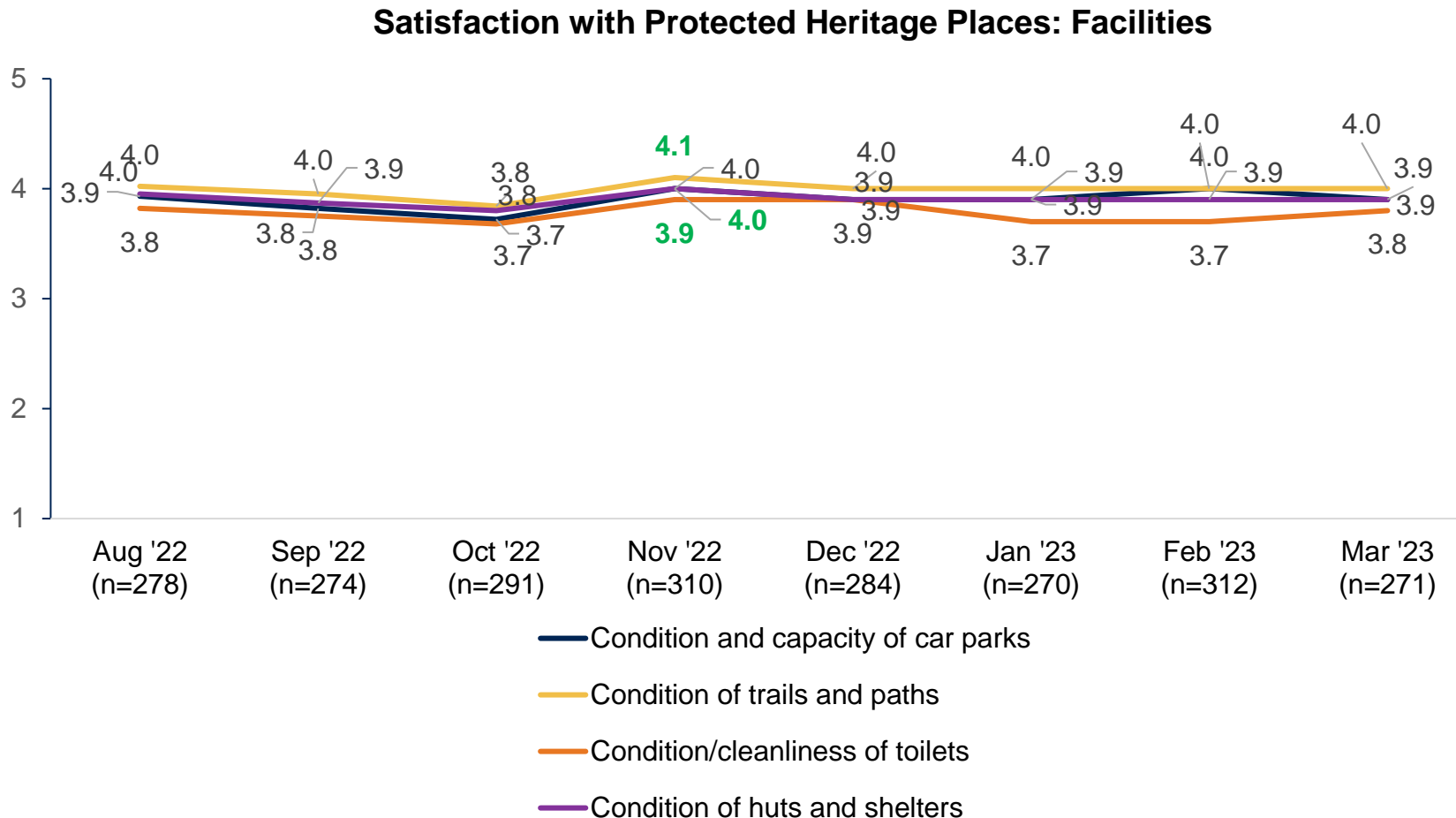


Q27: Overall, how would you rate your experience at <LOCATION SELECTED IN Q20>?

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

# Visitor satisfaction with *facilities* at Protected Heritage Places remains high.

5=Excellent\*  
 ↑  
 Mean scores  
 ↓  
 1=Terrible

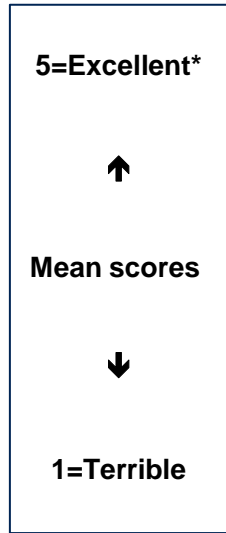


Green / red indicates significantly higher / lower than previous month

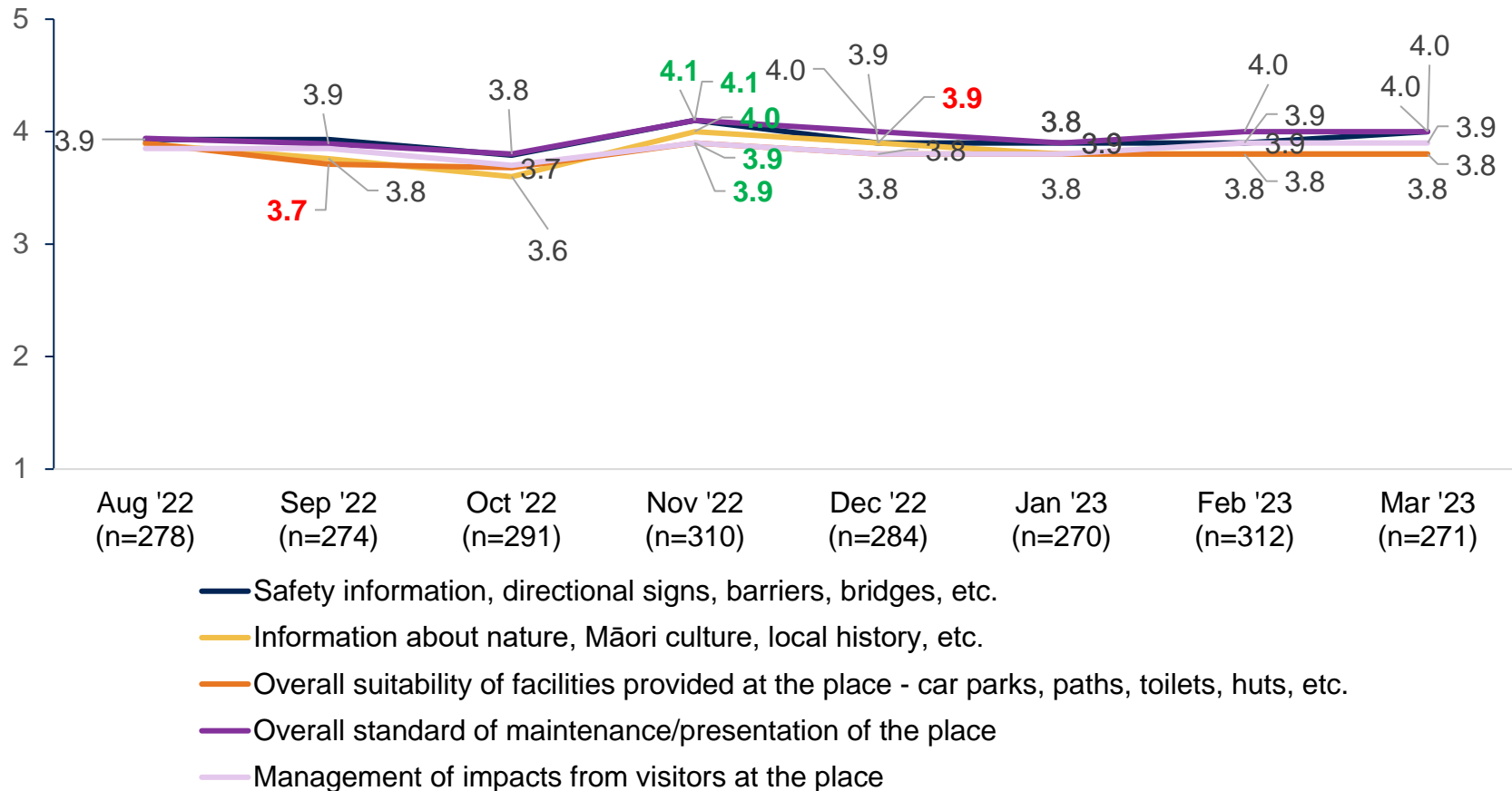
**Q26a:** Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how would you rate the following aspects listed below?

**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 high.



## Satisfaction with Protected Heritage Places: Signage and Maintenance



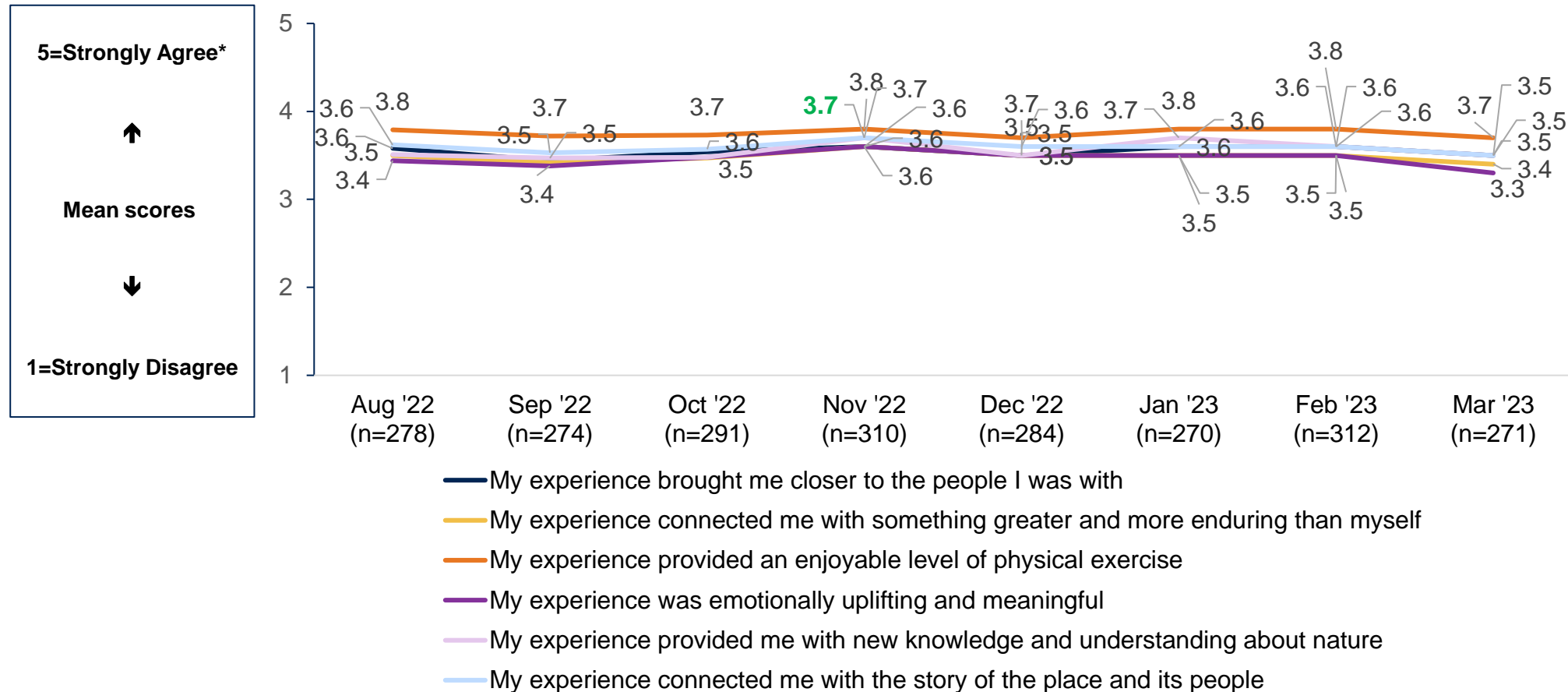
Green / red indicates significantly higher / lower than previous month

**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.

# Measures of *personal experience* at Protected Heritage Places softened across the board this month, with all measures down.

## Personal Experience at Protected Heritage Places (1)



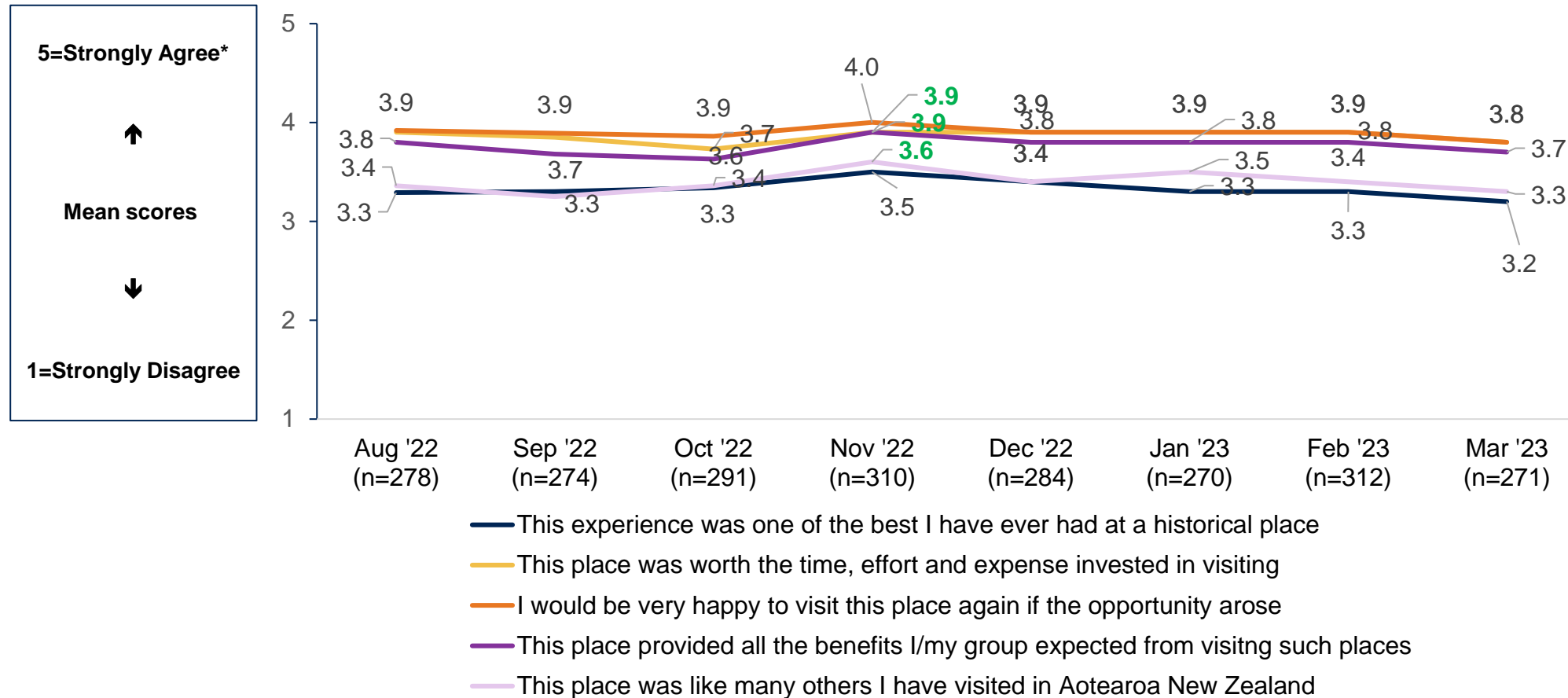
Green / red indicates significantly higher / lower than previous month

**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.

# Measures of *personal experience* at Protected Heritage Places softened across the board this month, with all measures down.

## 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?

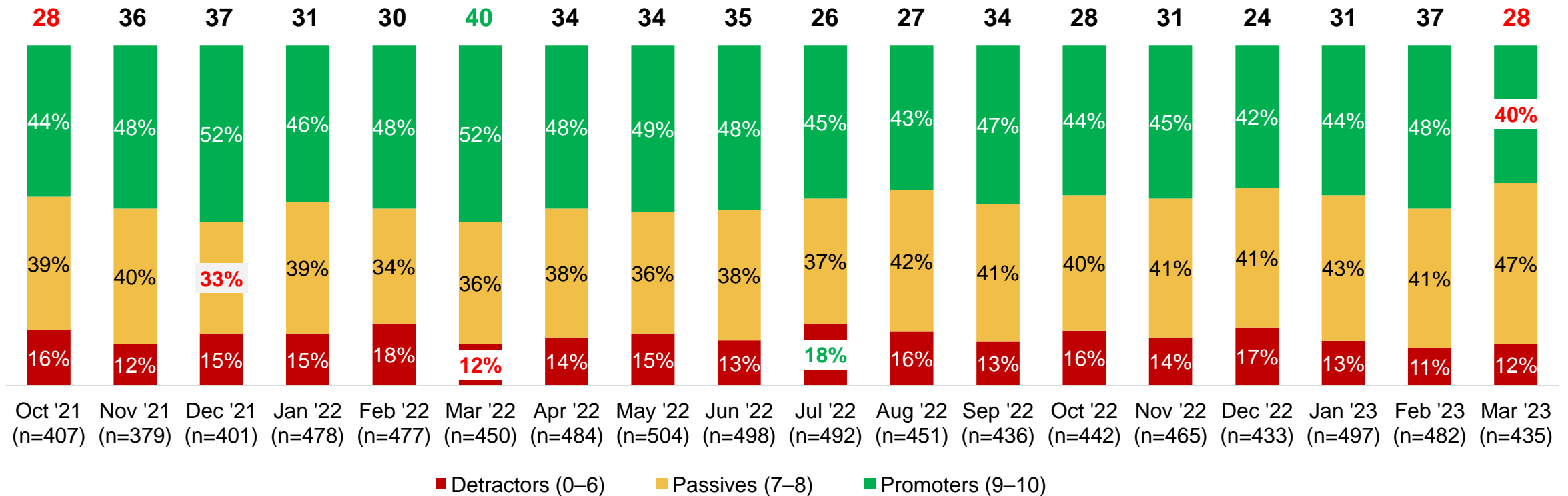
**Base:** Those who visited a Protected Heritage Place in the last month. **\*Note:** The mean score excludes 'Don't know / not applicable' responses. Higher mean scores are desirable.

# NPS



Protected Natural Areas' NPS has significantly decreased after it reached its highest level seen since March 2022. Compared to March 2022, NPS is now 12-points lower.

Protected Natural Areas – NPS



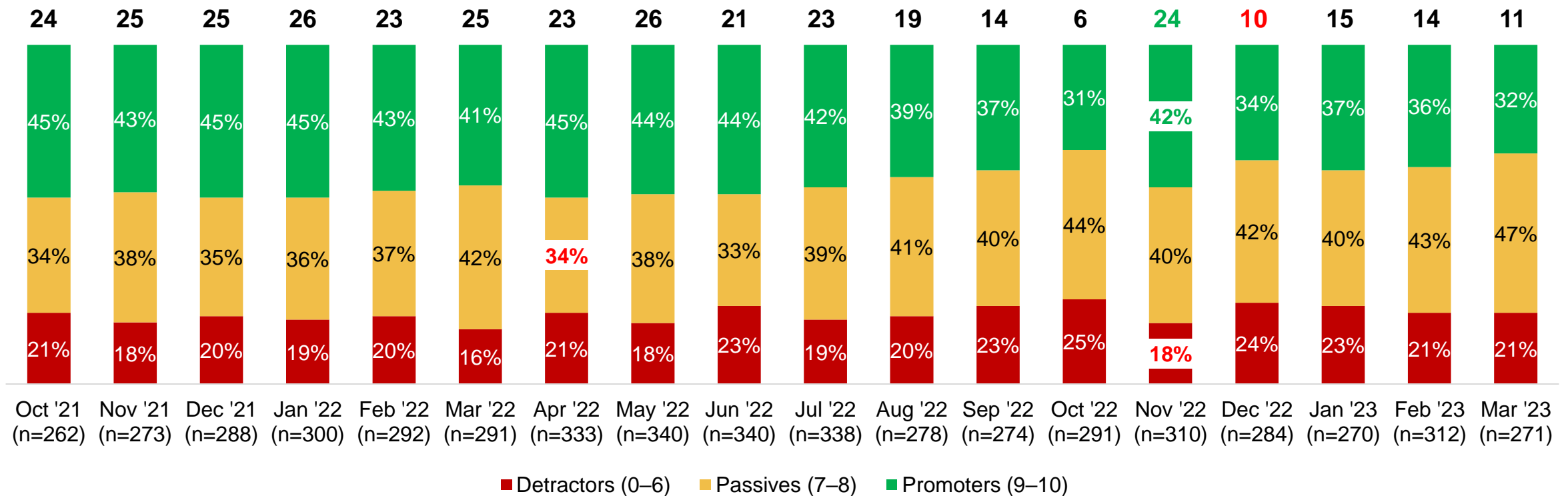
Green / red indicates significantly higher / lower than previous month

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 continues to decrease and remains much lower than for the 12 months preceding the substantial decline that began in September.

Protected Heritage Places – NPS



Green / red indicates significantly higher / lower than previous month

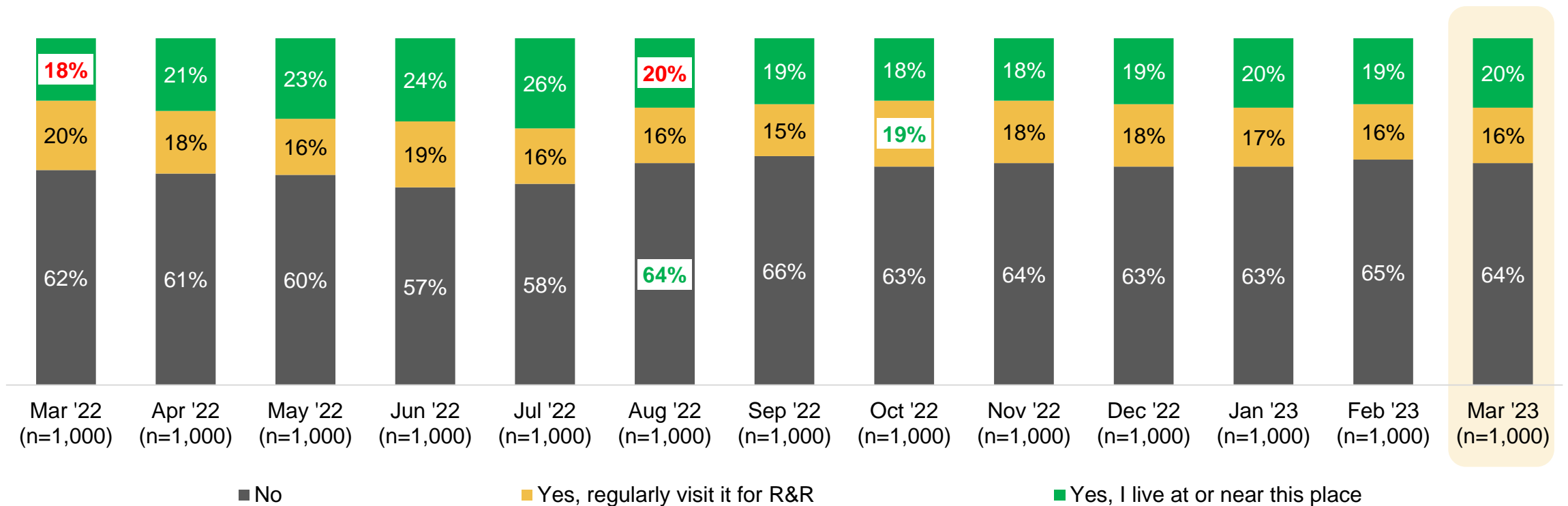
Q28: How LIKELY is it you would RECOMMEND <LOCATION SELECTED IN Q20> to your family or friends?

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?



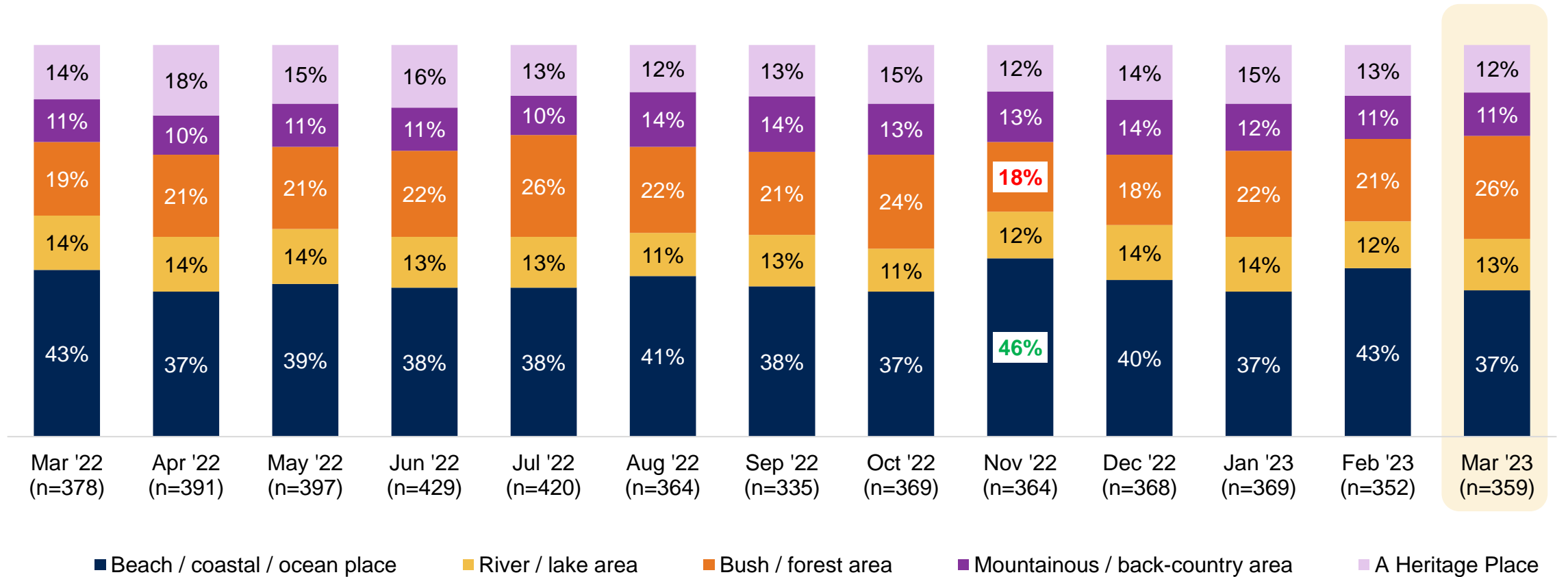
Green / red indicates significantly higher / lower than previous month

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

# The number of people saying a *bush/forest* place is important to them has increased this month.

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



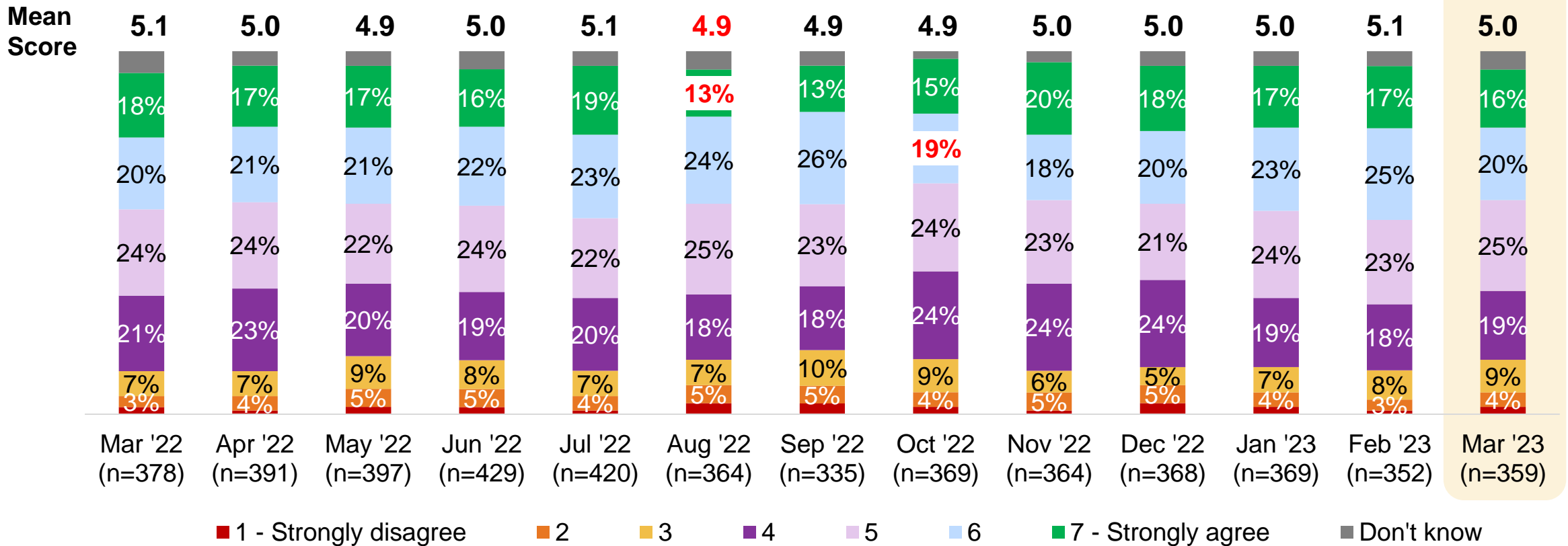
Green / red indicates significantly higher / lower than previous month

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.

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



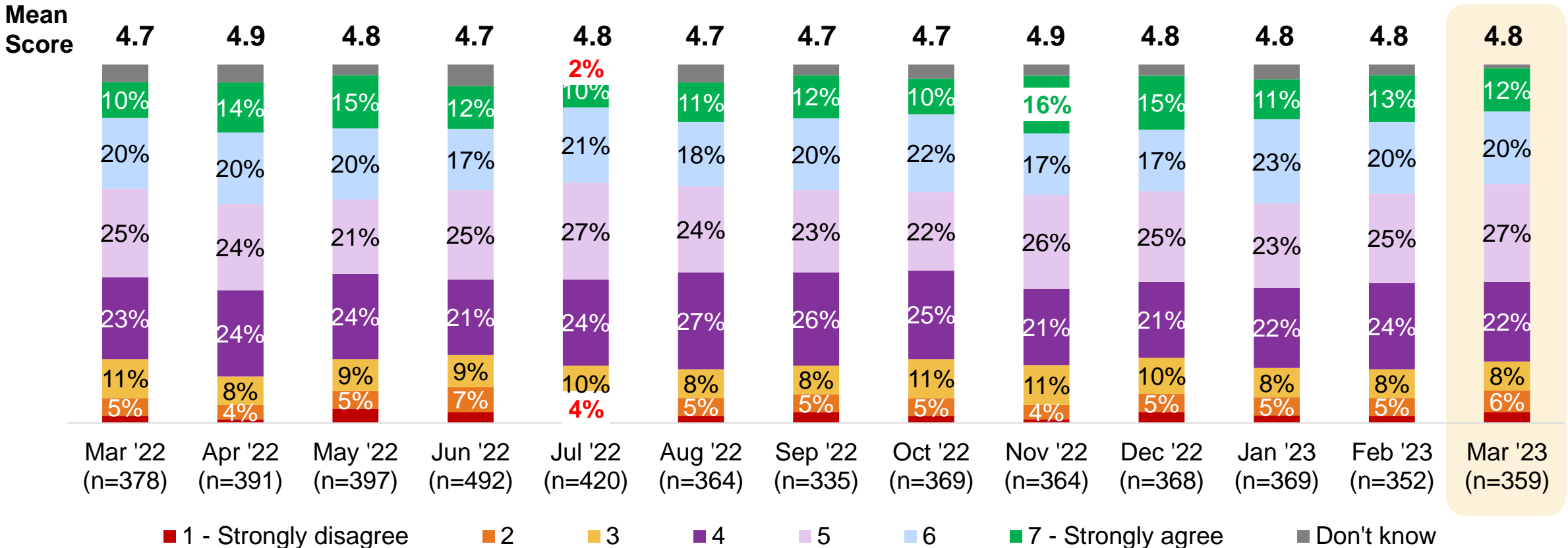
Green / red indicates significantly higher / lower than previous month

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 last month and this time last year.

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



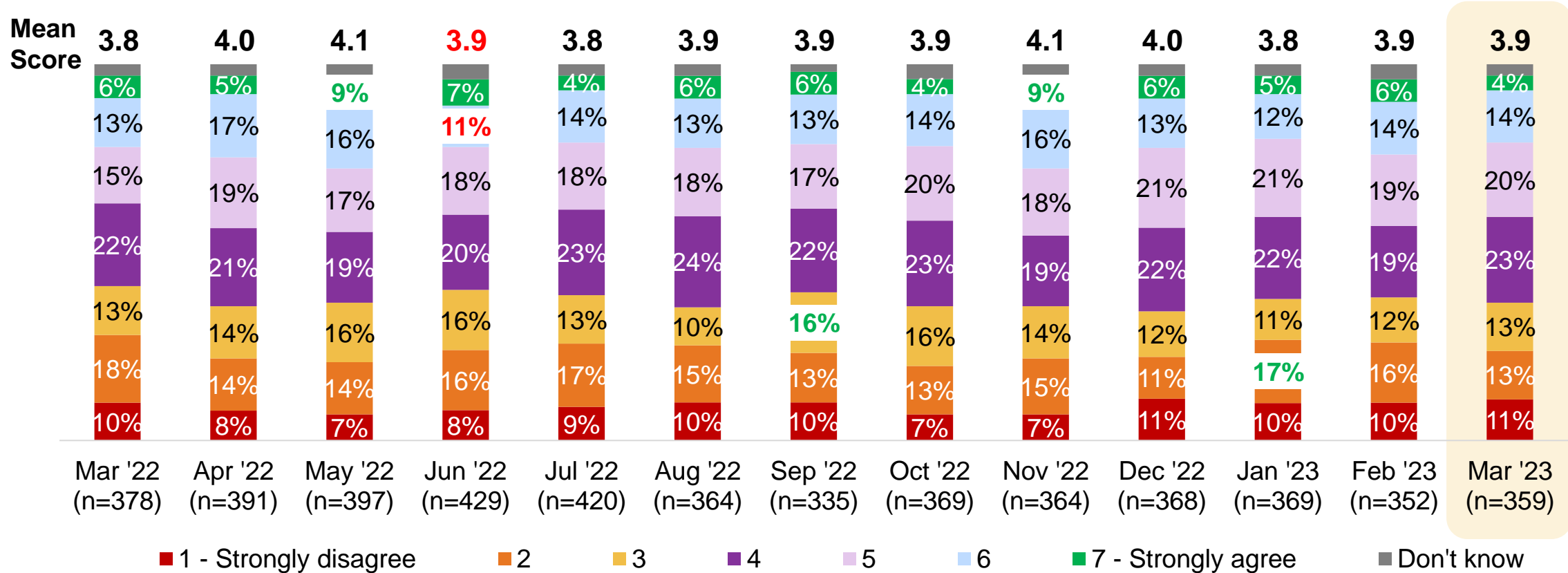
Green / red indicates significantly higher / lower than previous month

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* remains higher compared to a dip in January.

“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?

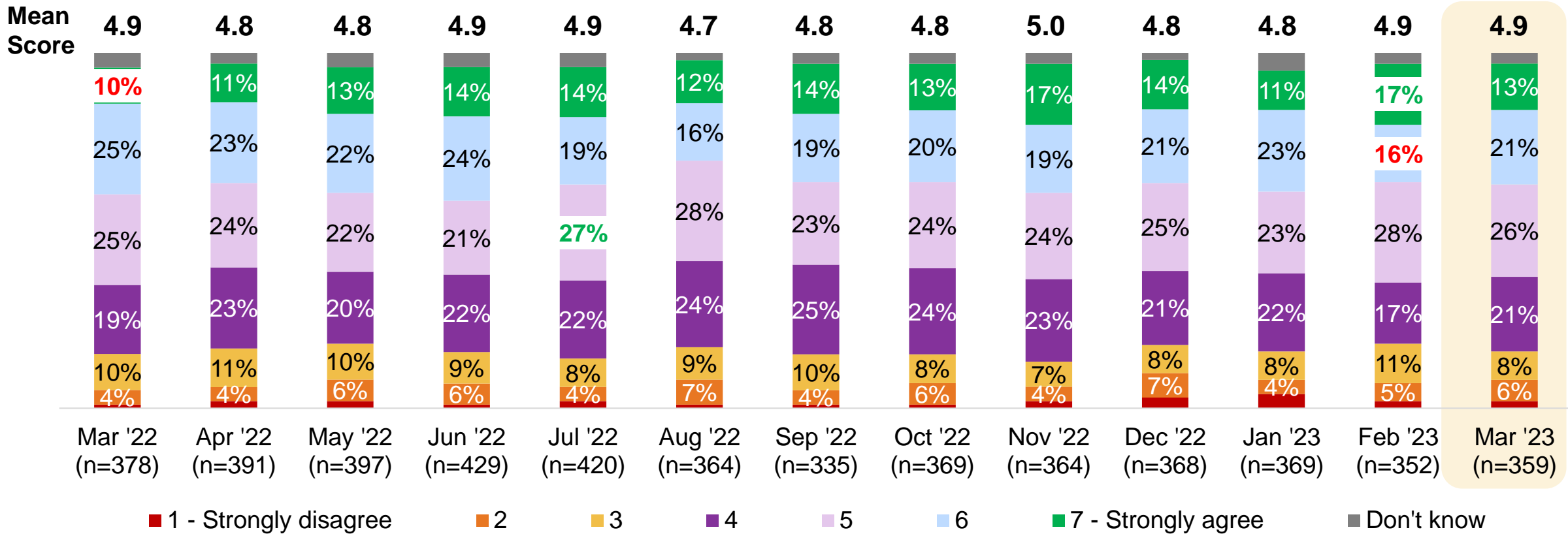
Base: Those who live near or regularly visit this place



# The number of people who strongly agree that Protected Natural Areas visitors help ensure the areas they visit are protected and improved 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”

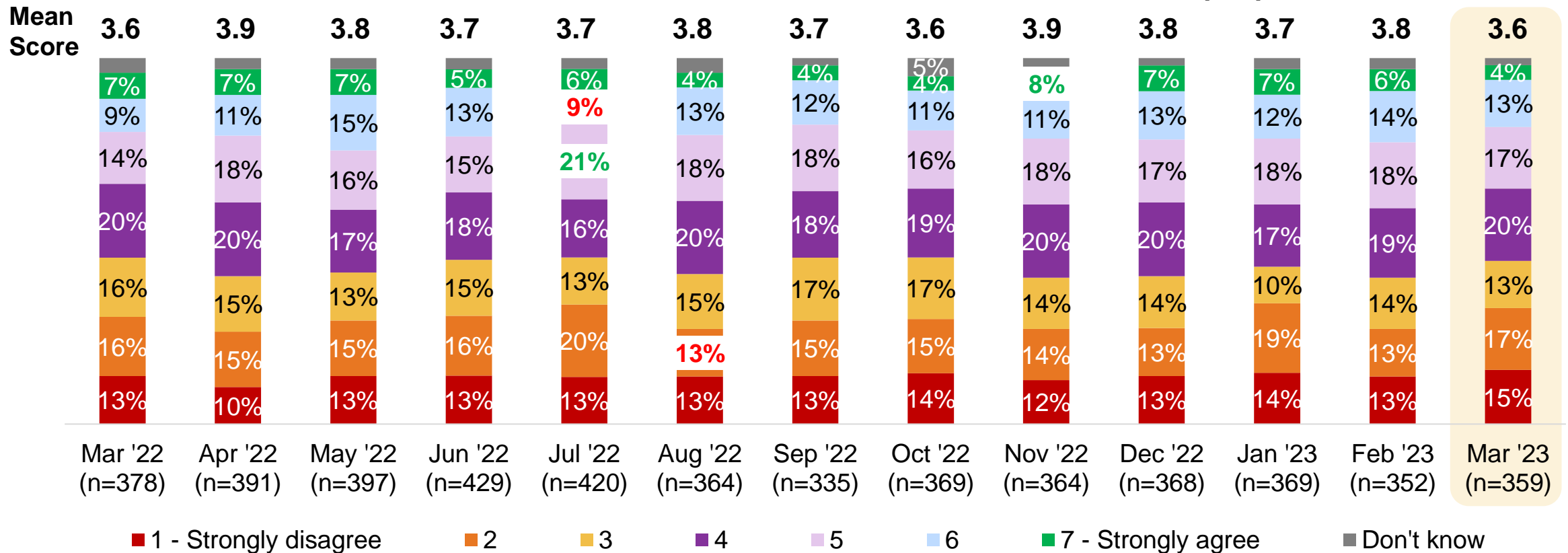


Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place

This month, less people agree that *visitors affect the attractiveness of a Protected Natural Area* with more people giving a rating of 1 or 2.

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



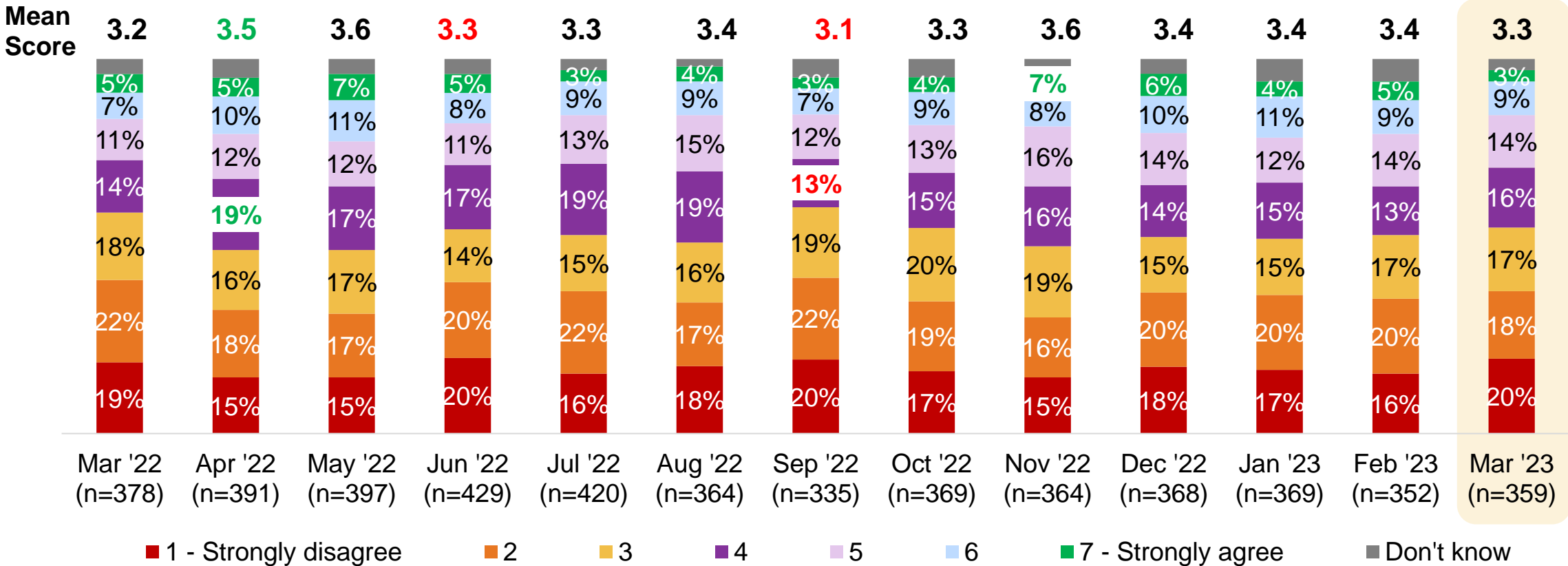
Green / red indicates significantly higher / lower than previous month

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

Base: Those who live near or regularly visit this place

This month, more people disagree that *visitors weaken local traditions & cultures*, following a peak in November.

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



Green / red indicates significantly higher / lower than previous month

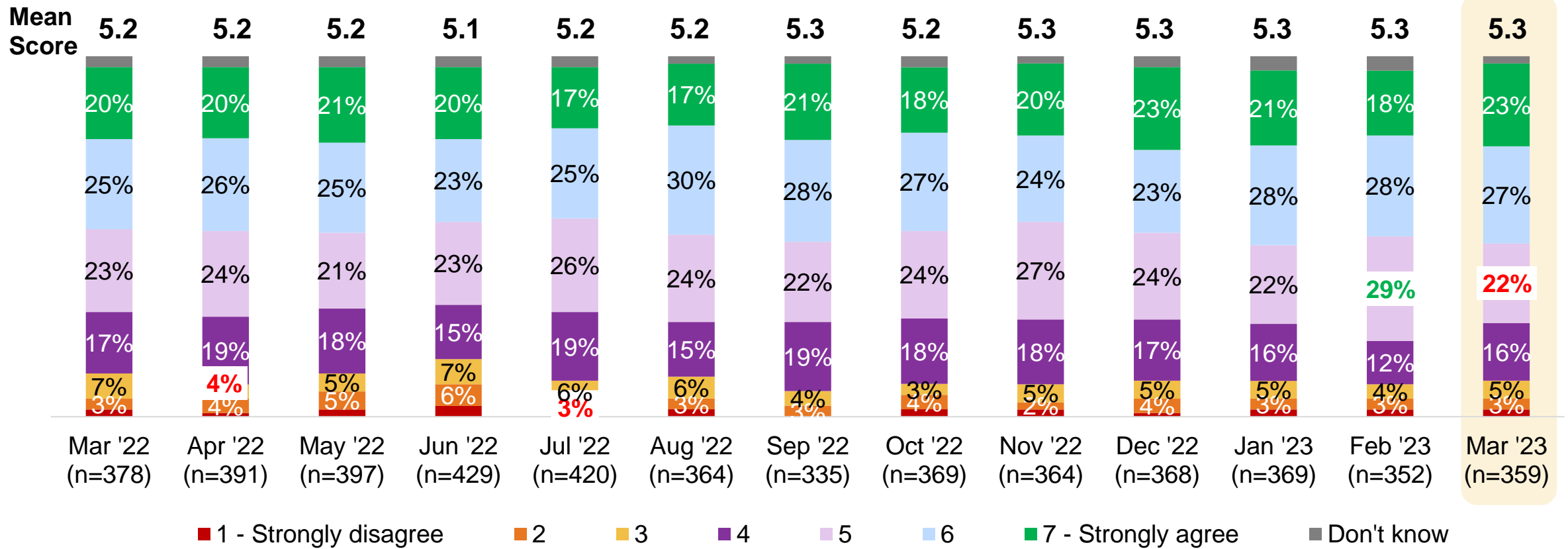
Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place



This month, more people strongly agree that *PNA visitors improve the local economy*, possibly reflecting the post-Covid tourism rebound. However there is also a larger number of people who are neutral.

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



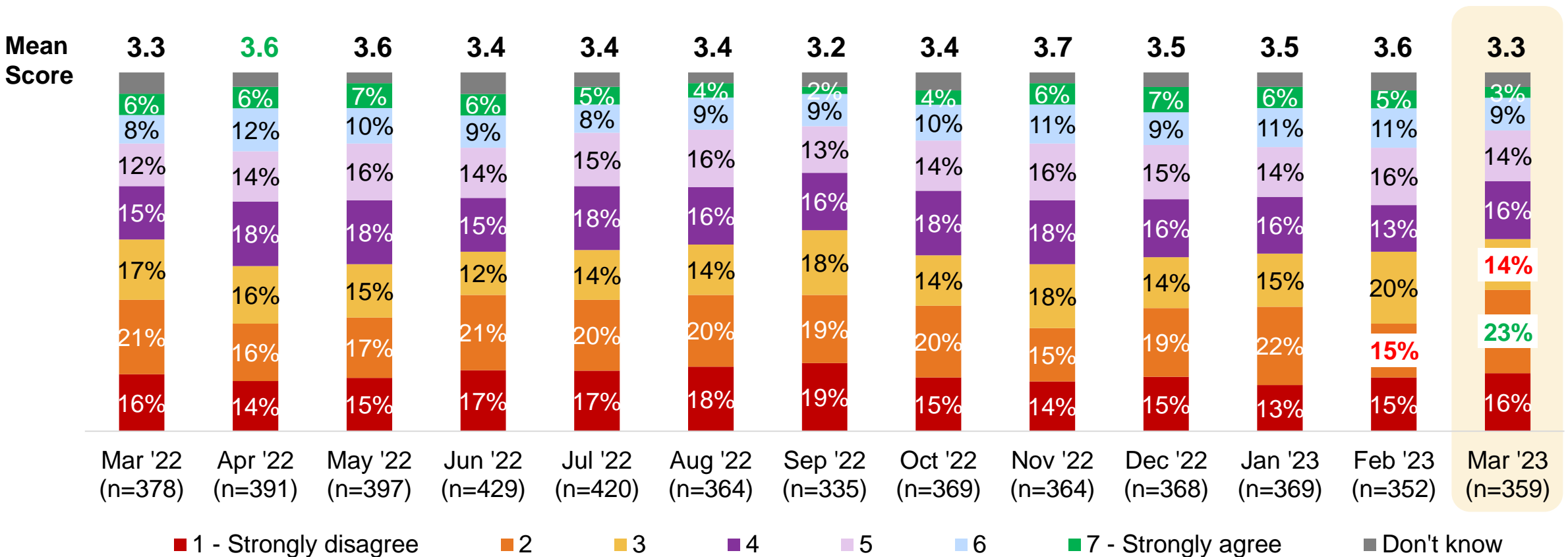
Green / red indicates significantly higher / lower than previous month

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

Base: Those who live near or regularly visit this place

This month, fewer people agree that *visitors add unwanted financial burdens to local communities*, with significantly more people giving a rating of 2 (disagreement).

“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

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*					
							
		n=	Beach / Coast	River / Lakes	Bush / Forest	Back-Country	Heritage Place
		6,482	2,511	829	1,423	767	952
Positive Effects	Visitors to this Protected Natural Area improve the local economy	5.2	5.3	5.2	5.0	5.2	5.2
	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	5.0	5.4
	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	5.1
	Visitors to this Protected Natural Area improve the quality of life of the local communities	4.8	4.7	4.9	4.6	4.8	4.9
	<b>AVERAGE AGREEMENT WITH POSITIVE STATEMENTS</b> ( <i>higher numbers are better</i> )	<b>5.0</b>	<b>4.9</b>	<b>5.0</b>	<b>4.8</b>	<b>5.0</b>	<b>5.2</b>
Negative Effects	This Protected Natural Area is damaged by the activities resulting from these visitors	3.9	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	3.5	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	3.4
	<b>AVERAGE AGREEMENT WITH NEGATIVE STATEMENTS</b> ( <i>lower numbers are better</i> )	<b>3.6</b>	<b>3.7</b>	<b>3.9</b>	<b>3.4</b>	<b>3.8</b>	<b>3.6</b>

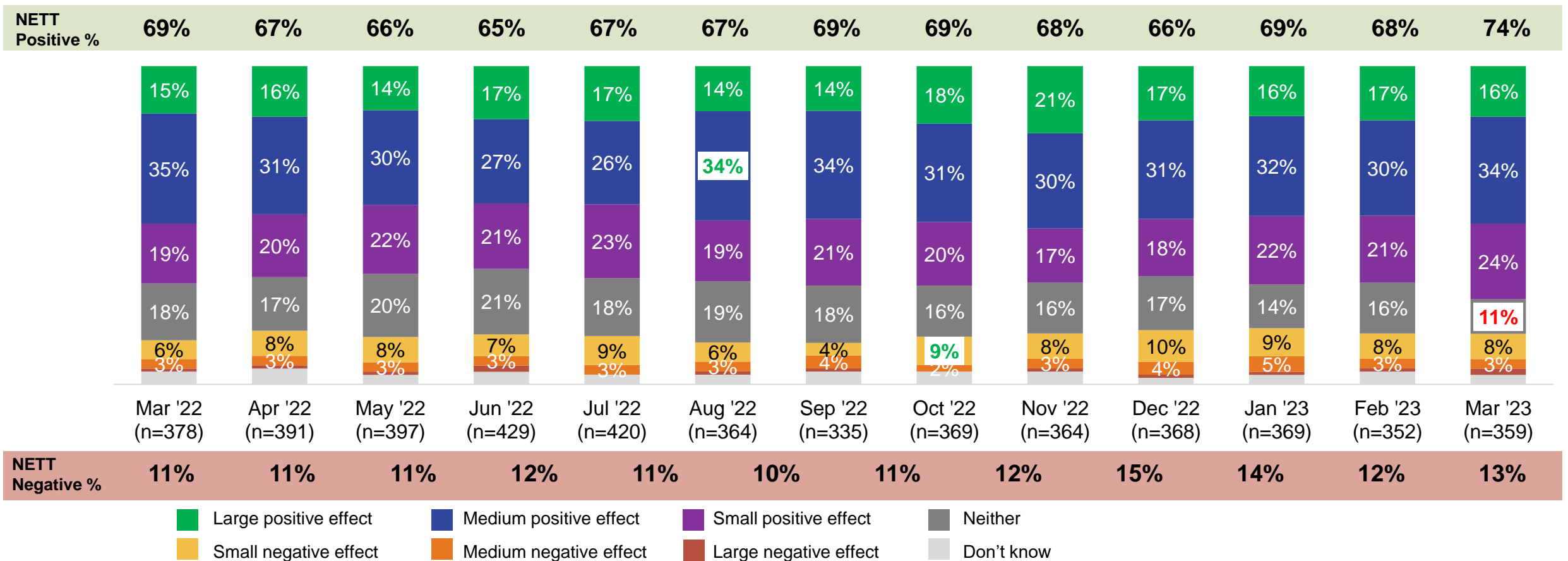
Green / red indicates significantly higher / lower than total

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.

# This month, more residents & visitors to Protected Natural Areas 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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# ABOUT IPSOS

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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

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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.

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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**

**GAME CHANGERS**

