

DOC PUBLIC PULSE OF CONSERVATION

May 2023 Topline Report for April 2023 Activity

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24 May 2023



GAME CHANGERS



KEY FINDINGS – MAY '23

(COVERING APRIL '23 ACTIVITY)

- April visitation to Protected Natural Areas continued to increase following a significant decline in February activity which coincided with Cyclone Gabrielle. Visitation to Protected Natural Areas and Protected Heritage Places is stable with a year ago.
- The frequency of visits to Protected Natural Areas and Protected Heritage Places (average number of visits) also remained stable when compared to a year ago.
- Satisfaction with the overall experience at Protected Natural Areas remained stable this month and is slightly lower when compared to a year ago.
- Satisfaction with the overall experience at Protected Heritage Places decreased compared to last month and is also lower when compared to a year ago.
- NPS for both Protected Natural Areas and Protected Heritage Places remained lower than a year ago. Protected Natural Areas NPS is 29. Protected Heritage Places NPS is 11. A year ago these were 34 and 26, respectively.
- Compared to last month, fewer residents & visitors to Protected Natural Areas agreed that visitors had a positive effect on the area at 66%. Last month this was 71%, however this is stable compared to a year ago which was also 66%.



SUMMARY


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

BACKGROUND & METHODOLOGY



Sample size

1,000




Fieldwork dates
May 8-17, 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

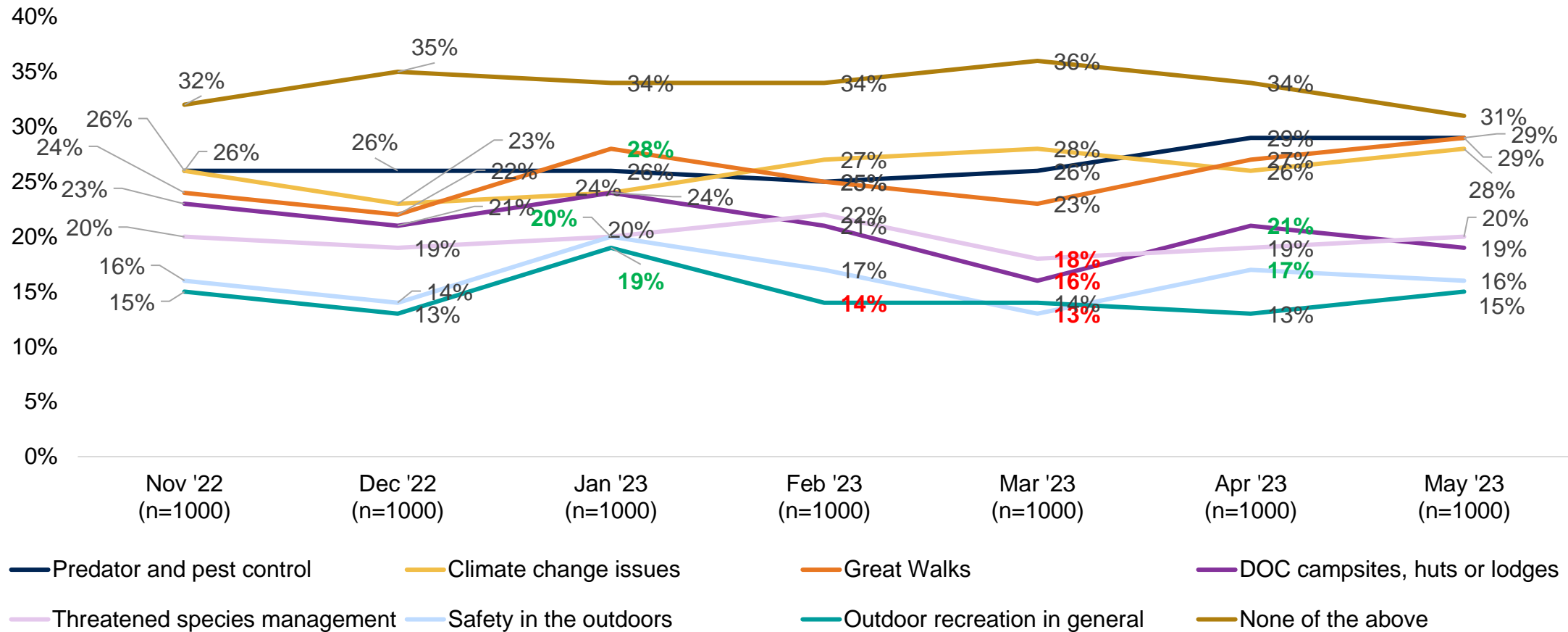
Nov 21	5–12 November, 2021
Dec 21	3–9 December, 2021
Jan 22	6–15 January, 2022
Feb 22	5–15 February, 2022
Mar 22	3–10 March, 2022
Apr 22	1–11 April, 2022
May 22	5–16 May, 2022
Jun 22	3–11 June, 2022
Jul 22	4–13 July, 2022
Aug 22	15-24 August, 2022
Sep 22	7-17 September, 2022
Oct 22	5-17 October, 2022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

DOC MEDIA PROFILE



In April, more people recalled hearing about *Great Walks*, returning to levels from early 2023. Compared to the end of last year, fewer people recalled hearing about *DOC campsites, huts or lodges*.

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



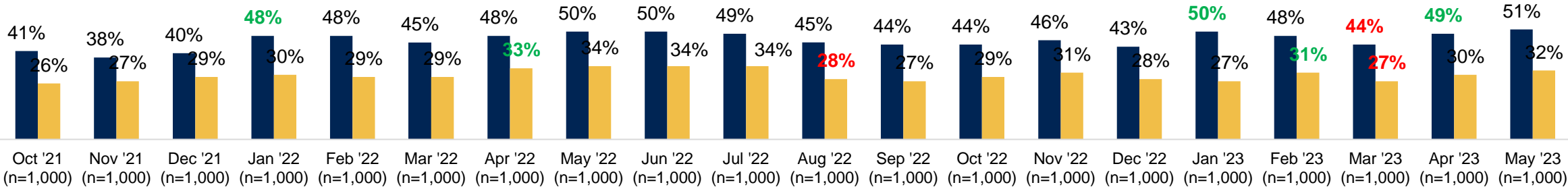
Green / red indicates significantly higher / lower than previous month

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.

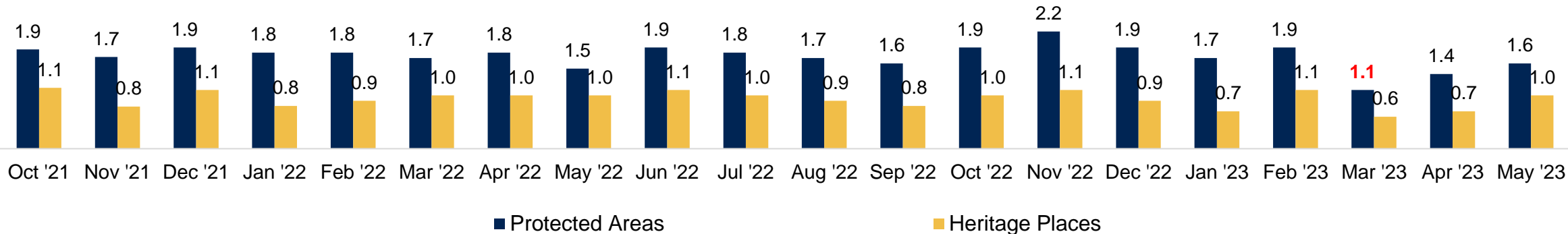
VISITATION FREQUENCY

Visitation to Protected Natural Areas and Heritage Places has continued to increase following a decline in March. Compared to a year ago, visitation is stable.

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



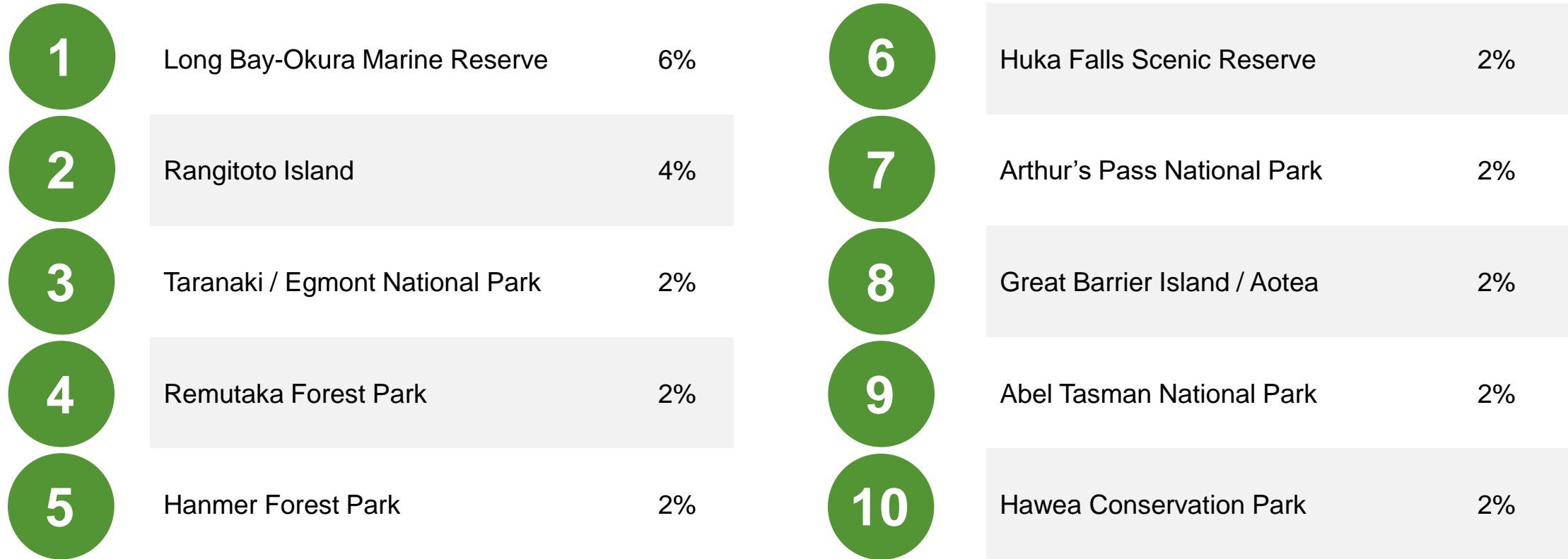
Average number of visits in the last month*



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.

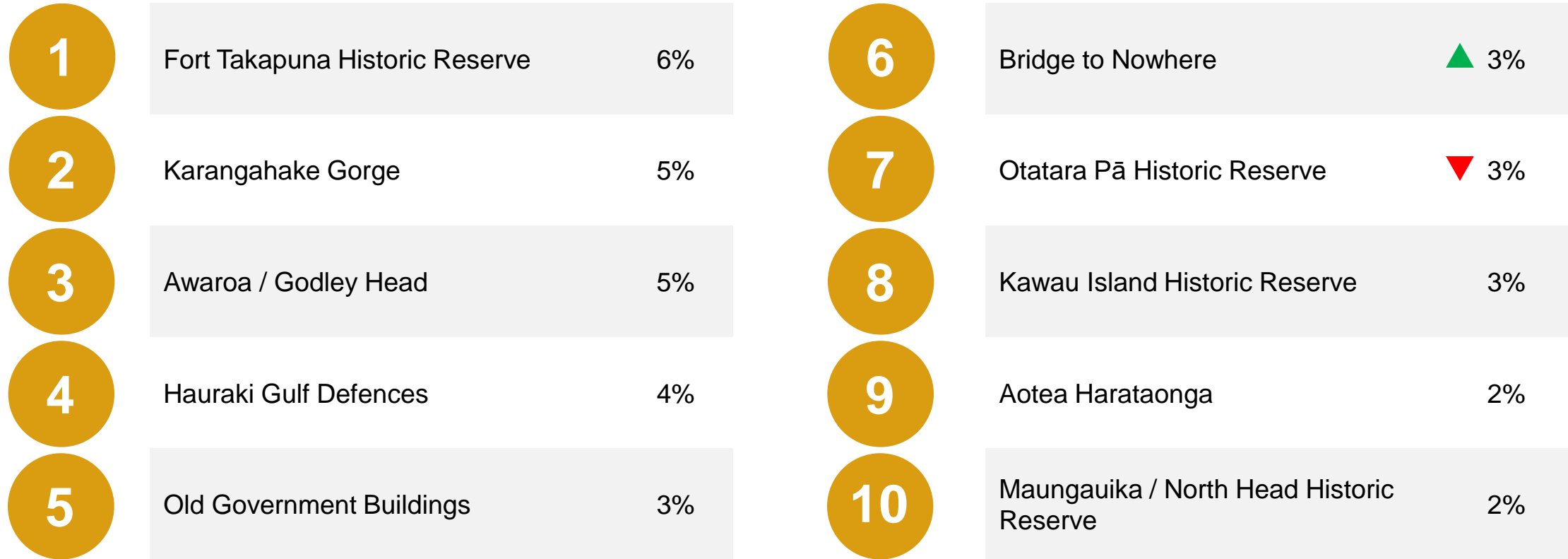
TOP-10 PROTECTED NATURAL AREAS VISITED: JUN 2021–MAY 2023.



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=10,870)

TOP-10 PROTECTED HERITAGE PLACES VISITED: JUN 2021–MAY 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=7,124)

In the April period significantly more people were going *camping* when visiting Protected Natural Areas.

Top activities when visiting Protected Natural Areas*

	Total	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	Apr'23	May'23
Base (n=)	8,957	464	380	407	379	401	478	477	450	484	504	498	492	451	436	442	465	433	497	482	435	488	508
Short walk (<3 hours)	39%	36%	38%	35%	33%	33%	41%	33%	41%	38%	38%	38%	38%	44%	42%	40%	41%	41%	44%	41%	43%	43%	39%
Sightseeing	30%	29%	32%	29%	29%	24%	31%	27%	30%	30%	32%	31%	30%	35%	34%	28%	31%	27%	32%	34%	28%	35%	30%
Photography	25%	26%	26%	21%	22%	21%	24%	24%	27%	24%	25%	24%	25%	26%	26%	26%	27%	26%	28%	27%	26%	26%	29%
Bird / wildlife watching	25%	28%	24%	26%	26%	24%	22%	20%	24%	25%	24%	24%	25%	26%	24%	24%	24%	27%	25%	26%	24%	26%	26%
Picnic, barbeque, etc	20%	17%	19%	17%	20%	19%	22%	21%	22%	22%	18%	19%	20%	20%	21%	21%	20%	22%	23%	20%	20%	24%	24%
Connecting with nature	23%	25%	22%	17%	25%	21%	21%	21%	24%	24%	25%	25%	26%	20%	22%	25%	22%	21%	25%	25%	23%	27%	24%
Day walk / hike (>3 hours but not overnight)	23%	23%	26%	21%	25%	26%	22%	21%	20%	24%	21%	26%	21%	23%	23%	23%	21%	25%	19%	25%	23%	18%	23%
Connecting with history	13%	14%	14%	11%	17%	10%	12%	11%	16%	14%	14%	13%	13%	10%	13%	17%	15%	15%	13%	16%	11%	15%	17%
Camping	12%	12%	14%	14%	14%	12%	16%	14%	13%	12%	11%	11%	11%	11%	8%	10%	11%	11%	12%	13%	8%	10%	15%
Connecting with culture	10%	11%	11%	8%	11%	12%	10%	11%	10%	10%	12%	7%	11%	8%	8%	13%	11%	10%	10%	11%	10%	13%	14%
Swimming in a lake/river/sea	9%	7%	5%	4%	5%	11%	18%	14%	16%	11%	10%	6%	7%	5%	6%	7%	9%	8%	16%	17%	9%	9%	8%

Green / red indicates significantly higher / lower than previous month

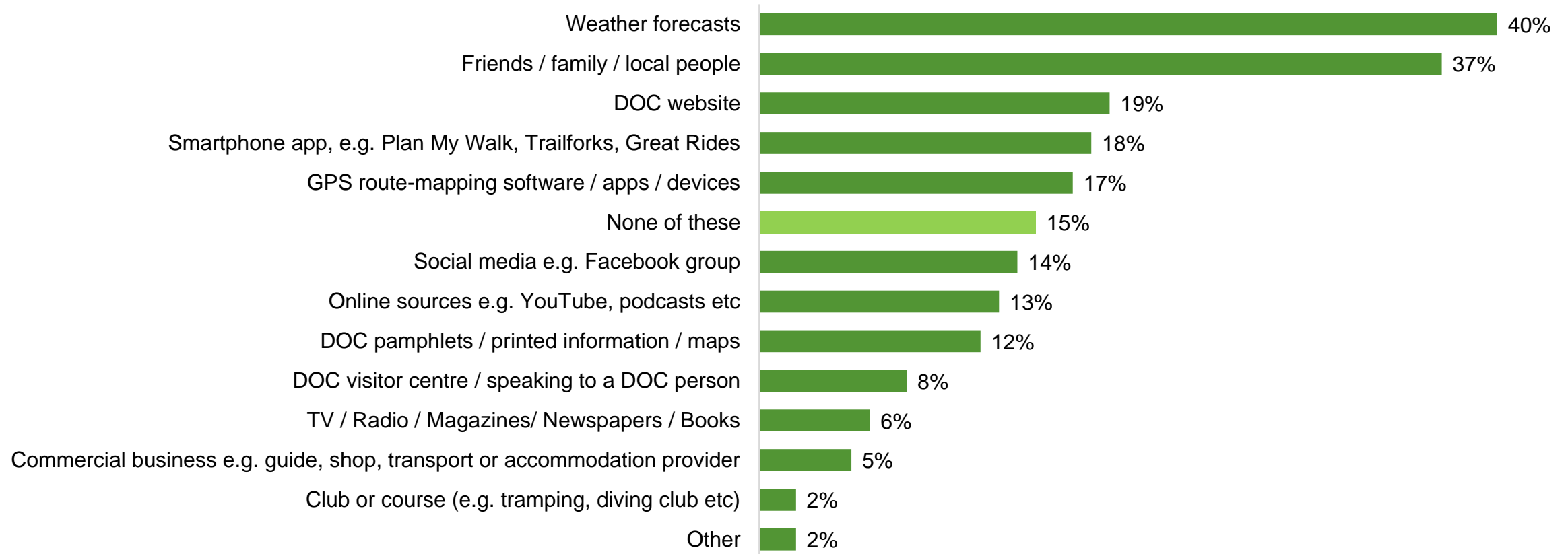
Q12: Thinking about your most recent visit to <LOCATION SELECTED IN Q8>, which of the following activities did you engage in?

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 continued to be the most used sources for planning visits to Protected Natural Areas.

Sources of Information used for Planning



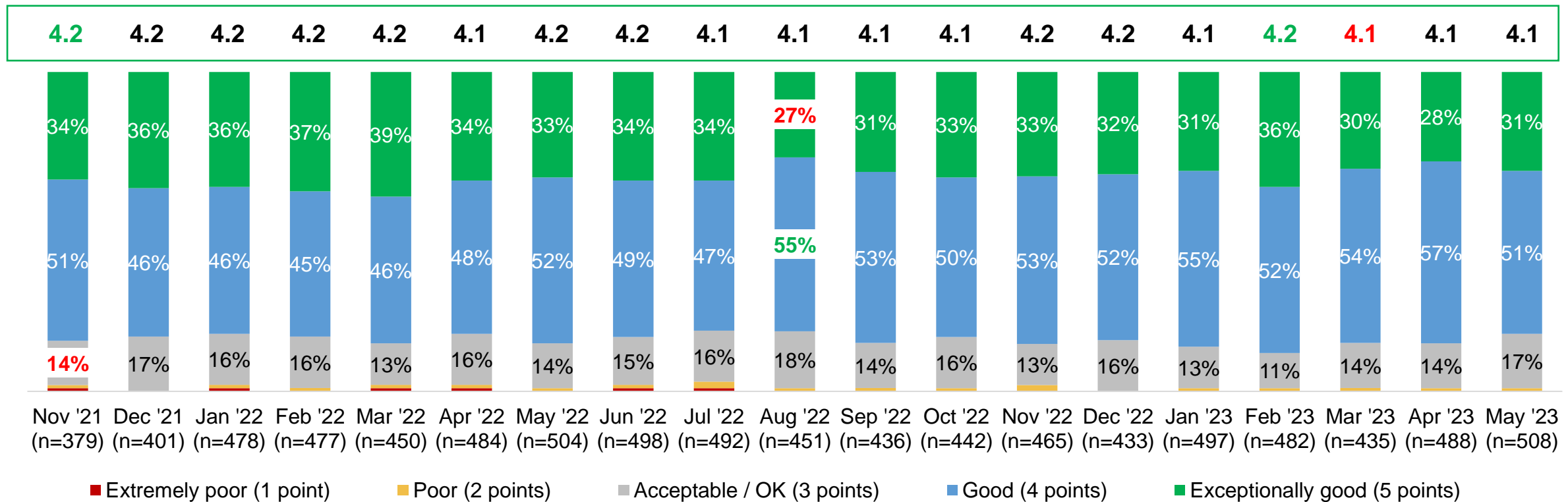
Q12b: Thinking about your most recent visit to <LOCATION SELECTED IN Q8>, what, if any information sources did you use to help plan for a successful trip?

Base: Those who visited a Protected Natural Area (n=2,800)

Visitors' satisfaction with the *overall experience* at Protected Natural Areas remained stable.

Protected Natural Areas – Overall Experience

Mean Score



Green / red indicates significantly higher / lower than previous month

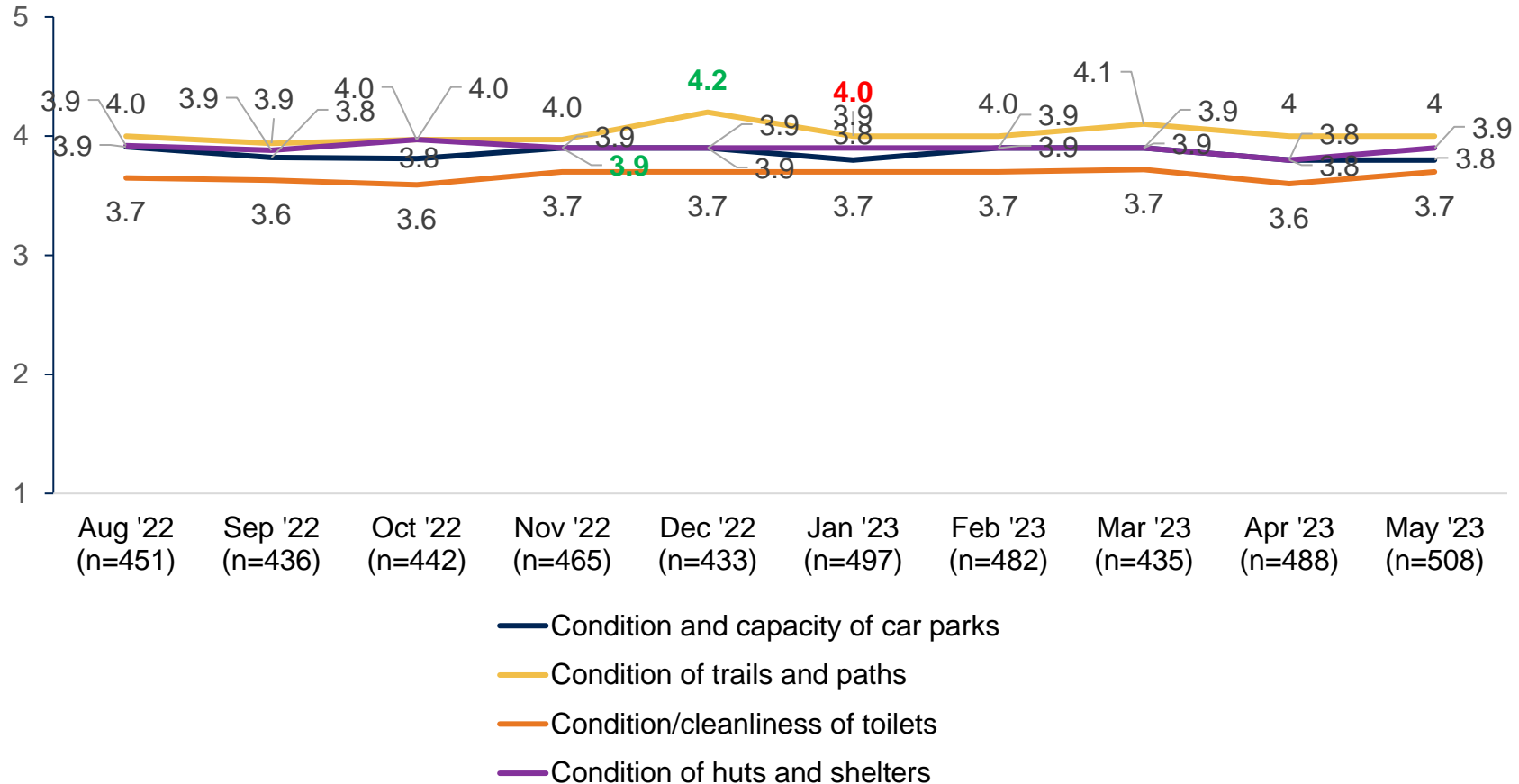
Q15: Overall, how would you rate your experience at <LOCATION SELECTED IN Q8>?

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

Compared to last month, visitors' satisfaction of the *condition/cleanliness of toilets* as well as *huts and shelters* within Protected Natural Areas increased slightly.

Satisfaction with Protected Natural Areas: Facilities

5=Excellent*
 ↑
 Mean scores
 ↓
 1=Terrible



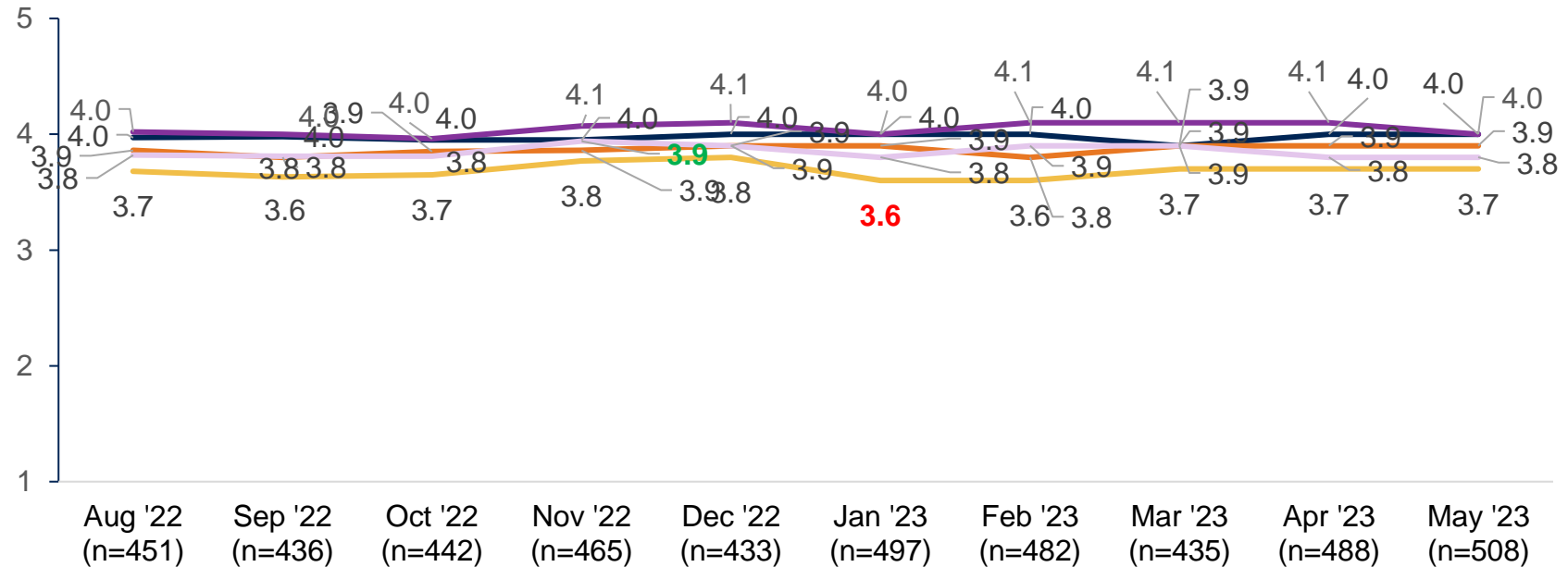
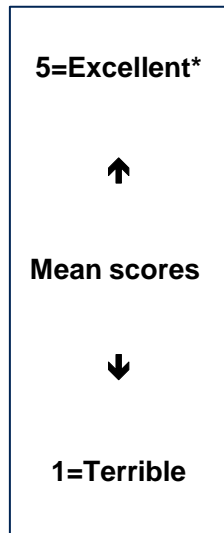
Green / red indicates significantly higher / lower than previous month

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.

Visitors' satisfaction with Signage and Maintenance remained high.

Satisfaction with Protected Natural Areas: Signage and Maintenance



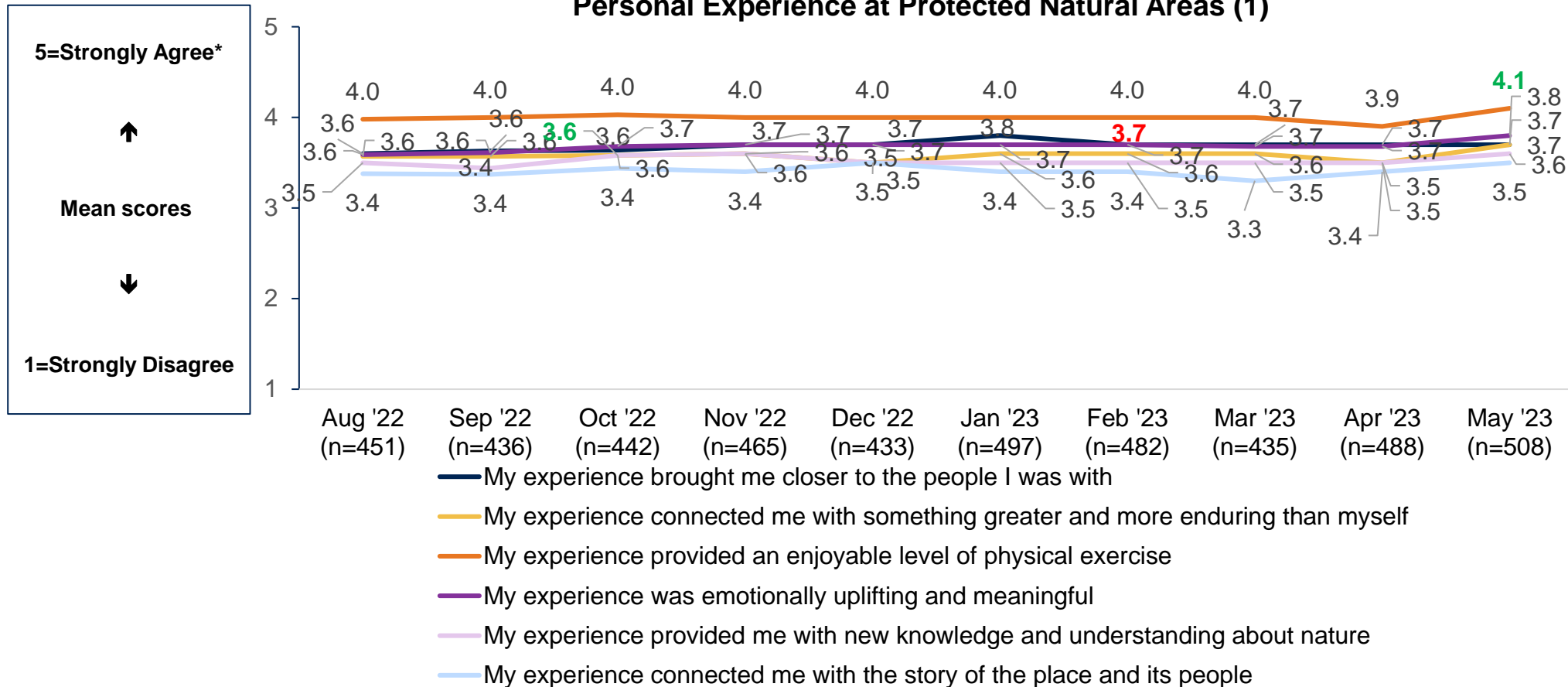
- Safety information, directional signs, barriers, bridges, etc.
- Information and stories about nature, Māori culture, local history, etc.
- Overall suitability of facilities provided at the place - car parks, paths, toilets, huts, etc.
- Overall standard of maintenance/presentation of the place
- Management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

Compared to last month, the number of visitors who agreed their most recent experience to a Protected Natural Area provided an enjoyable level of physical exercise significantly increased.

Personal Experience at Protected Natural Areas (1)



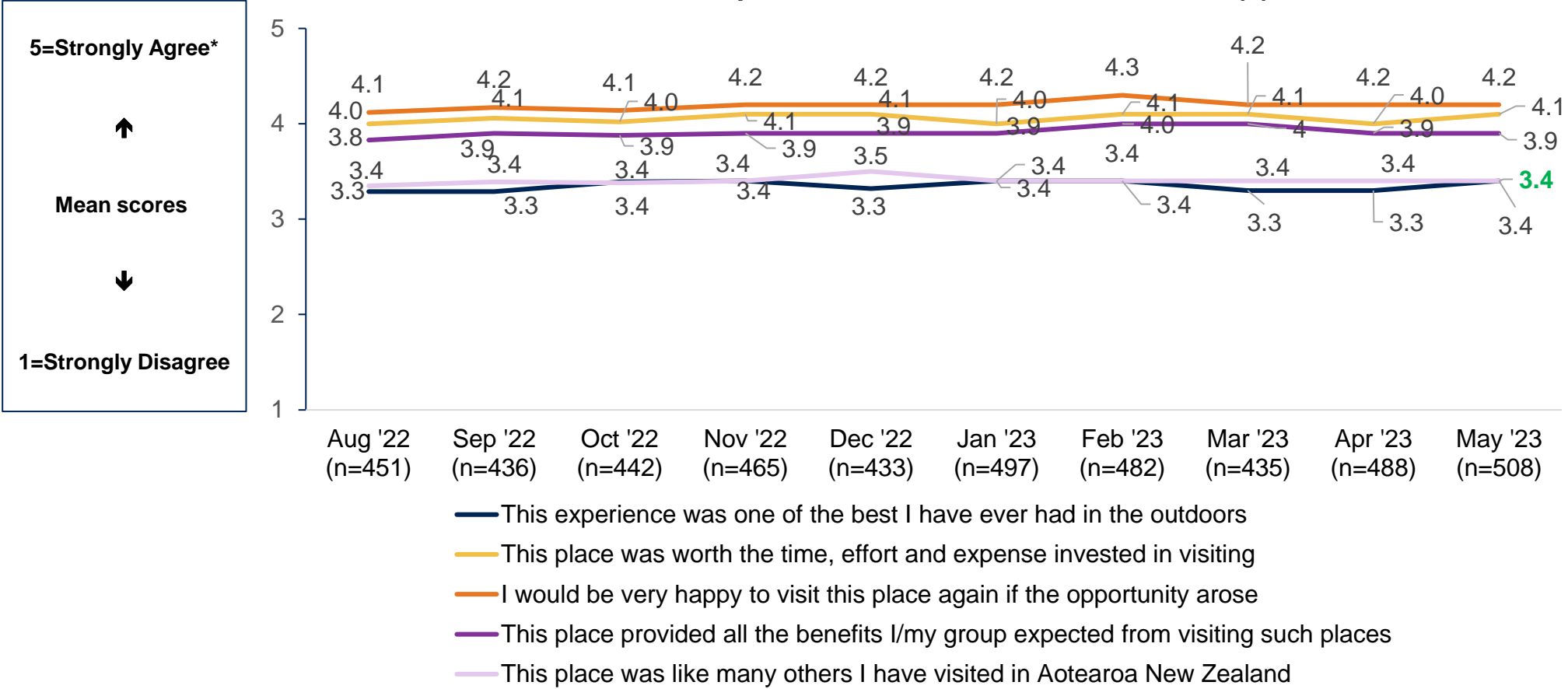
Green / red indicates significantly higher / lower than previous month

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.

Compared to last month, the number of visitors who agreed their most recent experience to a Protected Natural Area was 'one of the best' significantly increased.

Personal Experience at Protected Natural Areas (2)

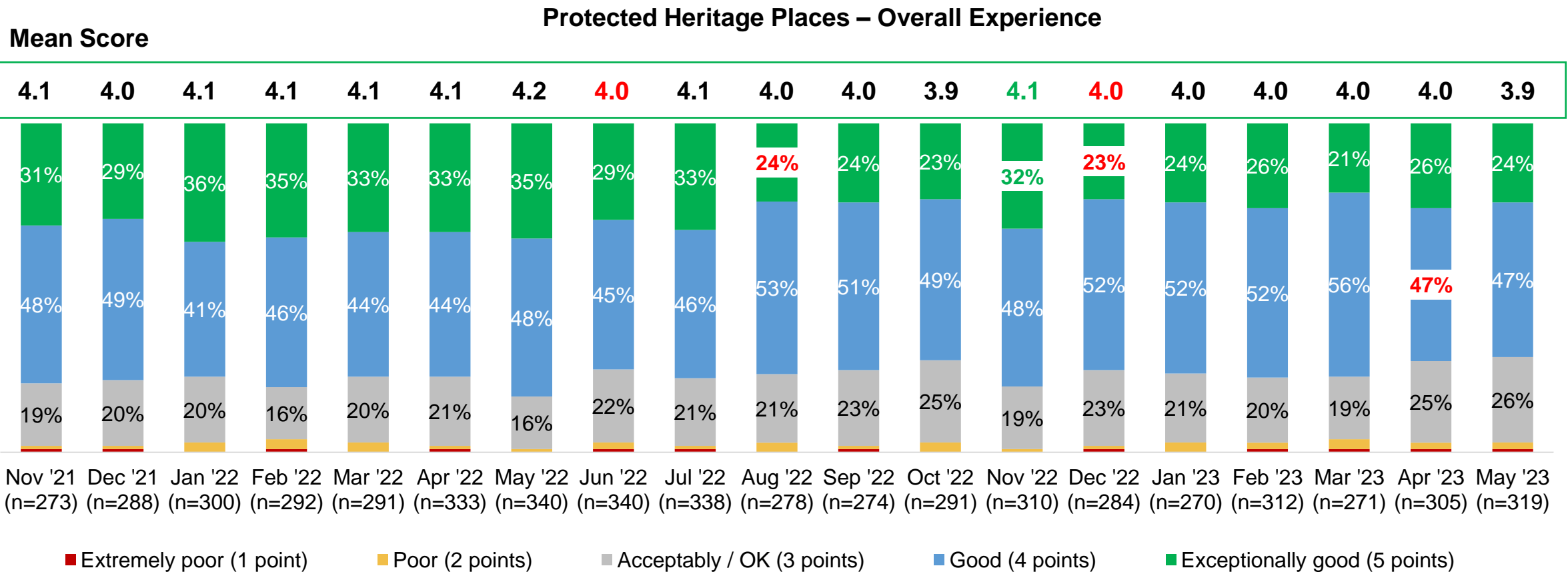


Green / red indicates significantly higher / lower than previous month

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.

Ratings of Overall Experience are lower compared to a year ago, following a significant decrease in those visitors rating their experience as *good*.



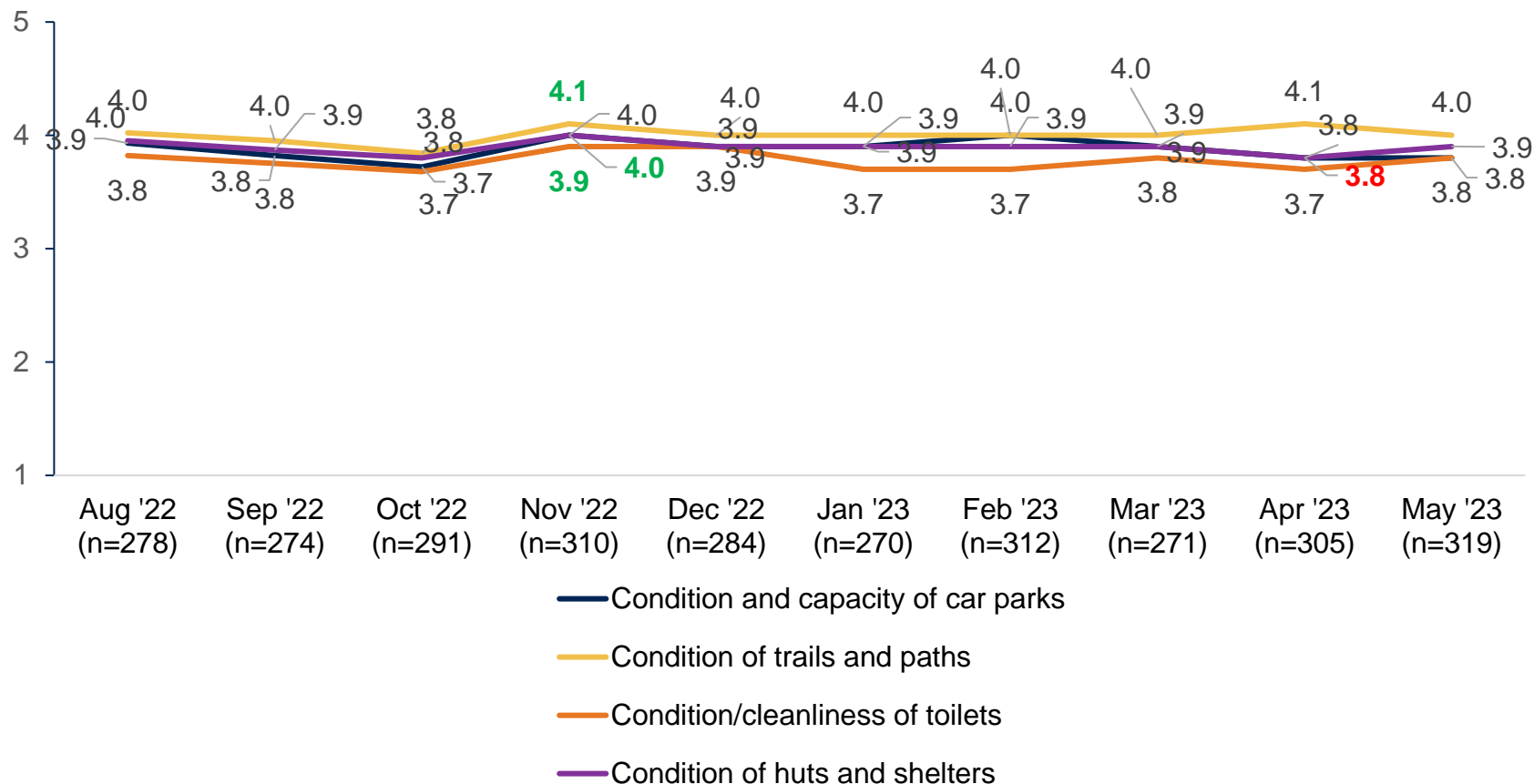
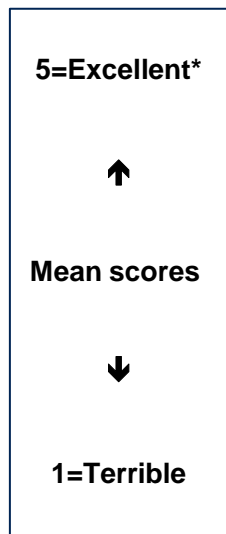
Green / red indicates significantly higher / lower than previous month

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

Compared to last month, visitors' satisfaction of the *condition of huts and shelters* recovered, following a significant decrease.

Satisfaction with Protected Heritage Places: Facilities



Green / red indicates significantly higher / lower than previous month

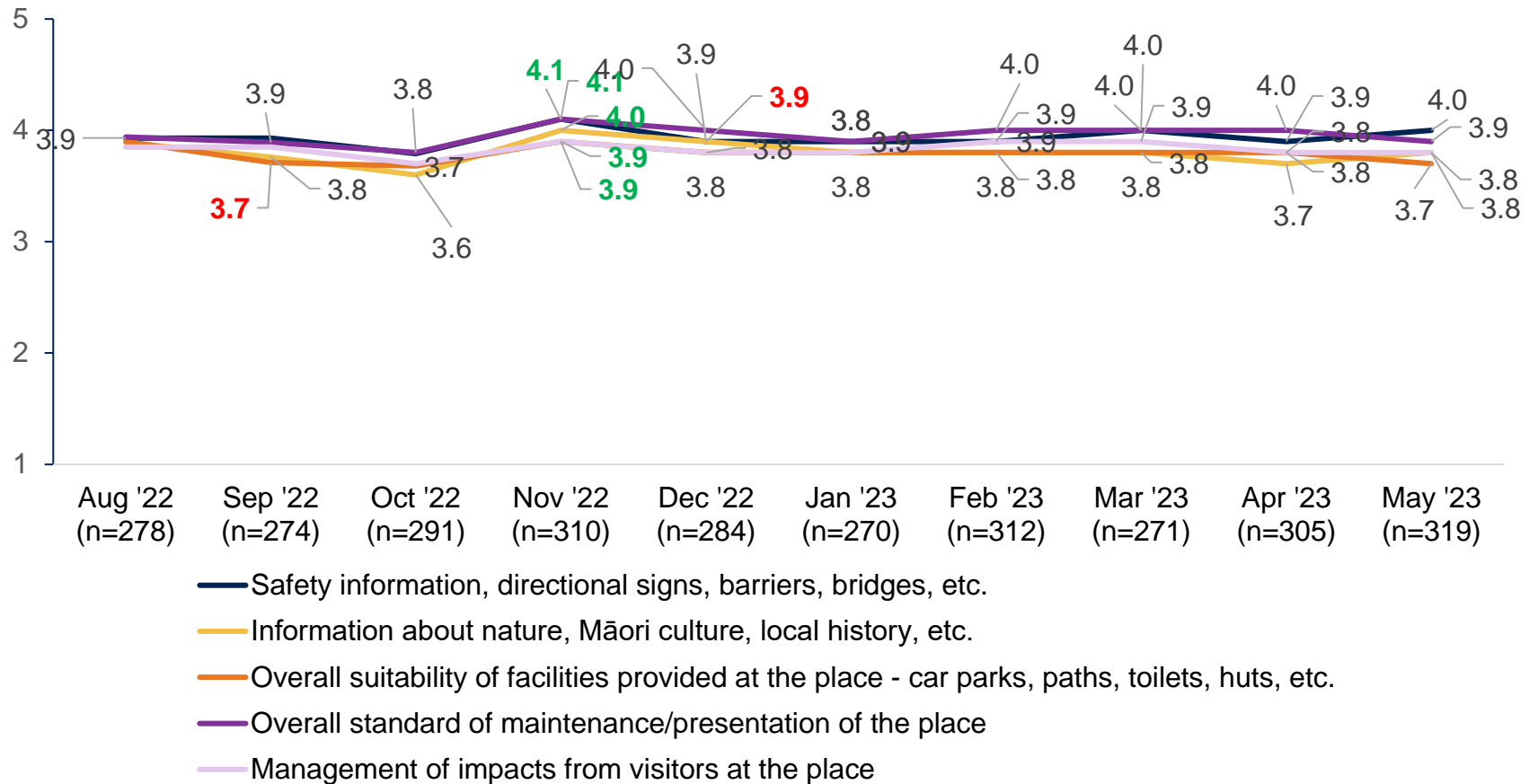
Q26a: Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how would you rate the following aspects listed below?

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 Signage and Maintenance remained high.

Satisfaction with Protected Heritage Places: Signage and Maintenance

5=Excellent*
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 Mean scores
 ↓
 1=Terrible



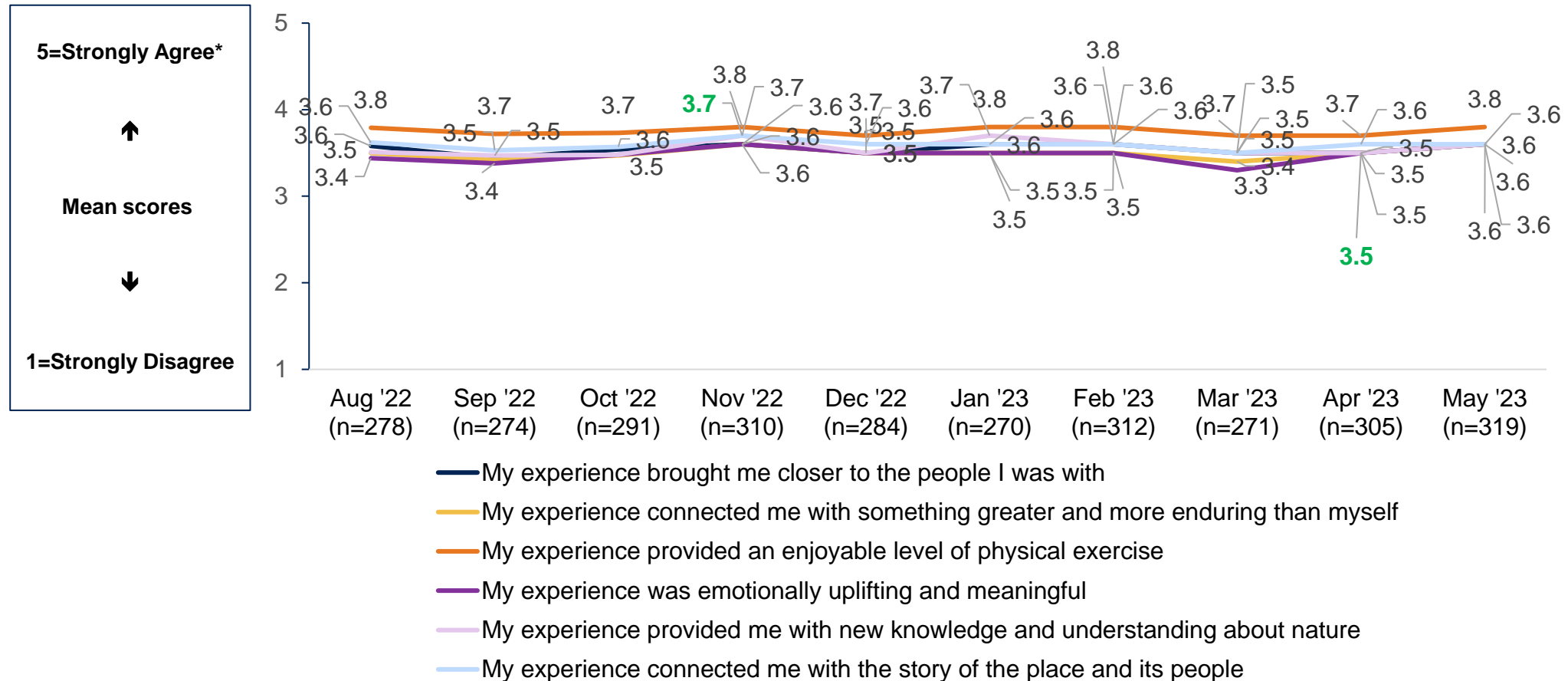
Green / red indicates significantly higher / lower than previous month

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.

Compared to last month, visitors' ratings of personal experience at Protected Heritage Places remained stable.

Personal Experience at Protected Heritage Places (1)



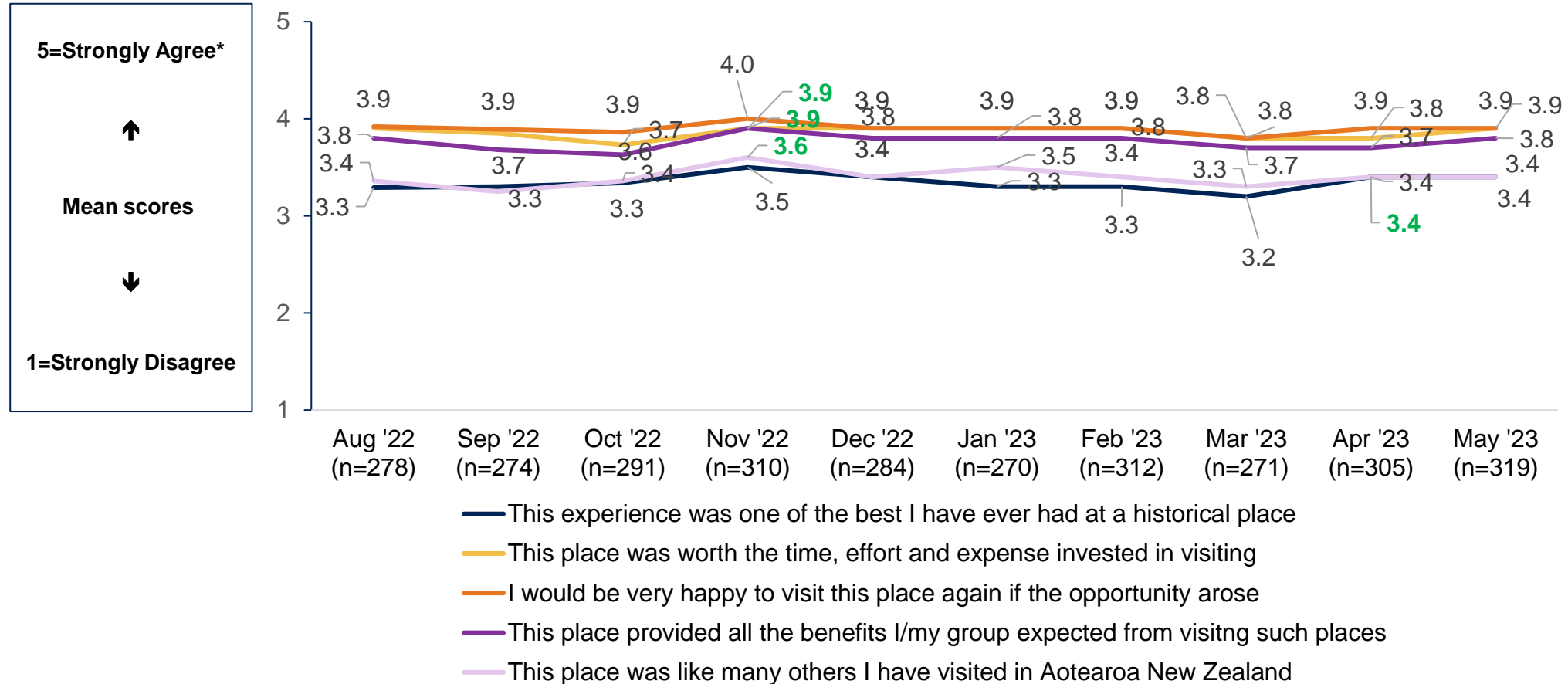
Green / red indicates significantly higher / lower than previous month

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.

The number of people saying their visit to a PHP *was one of the best ever had* remained high following a significant increase last month.

Personal Experience at Protected Heritage Places (2)



Green / red indicates significantly higher / lower than previous month

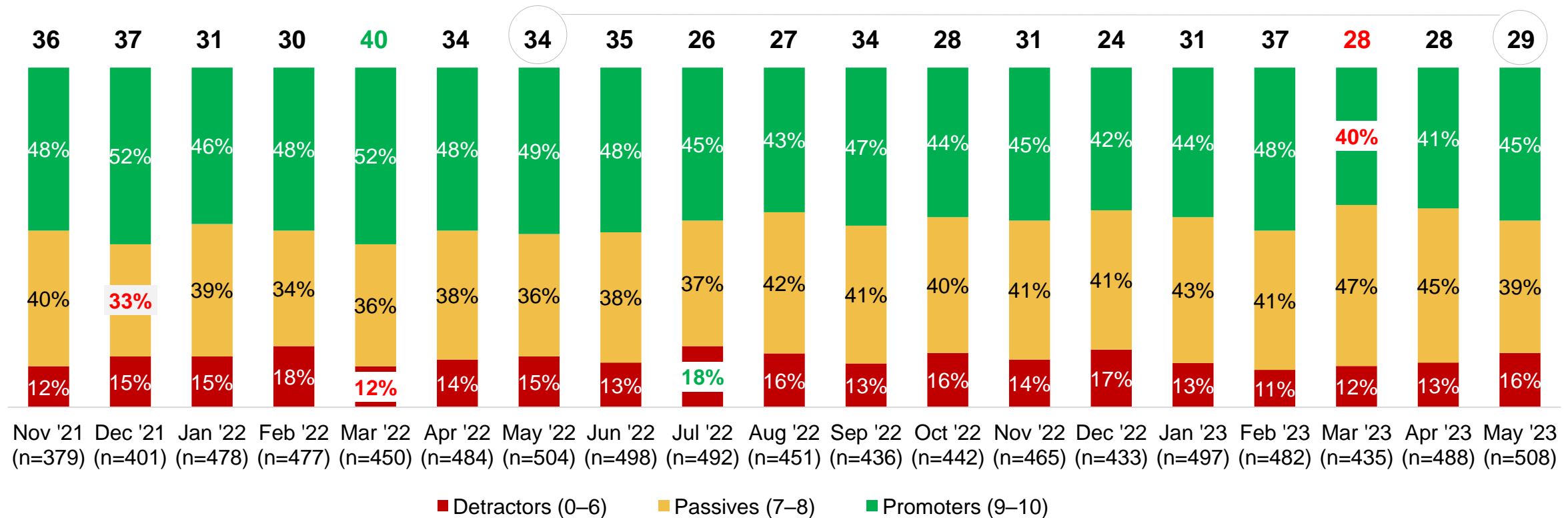
Q26b: Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how much do you agree or disagree with each of the statements below?

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

The NPS of Protected Natural Areas remains lower than a year ago, following a significant decrease in March.

Protected Natural Areas – NPS



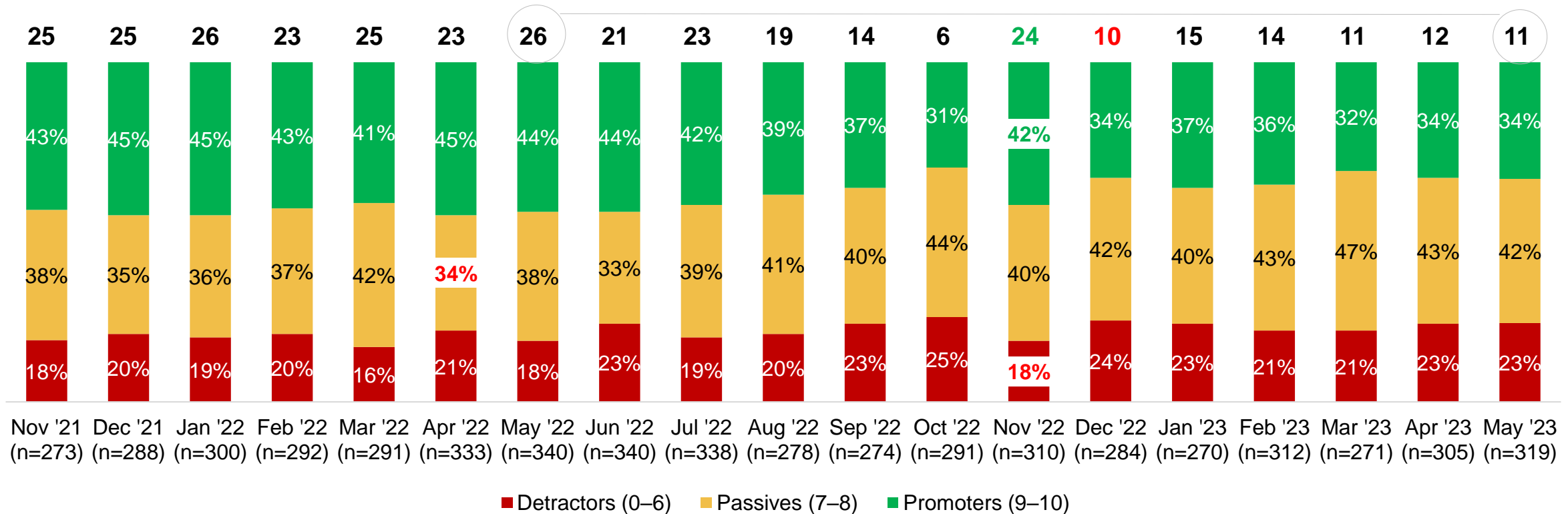
Green / red indicates significantly higher / lower than previous month

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 remains lower than a year ago.

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

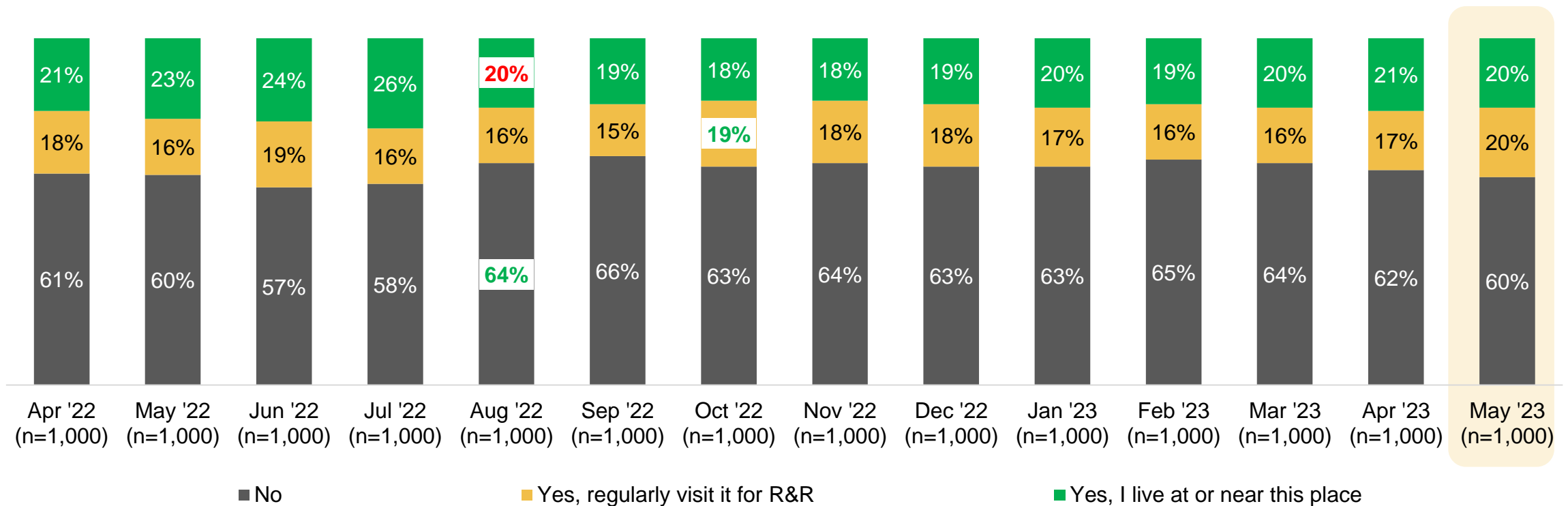
26 – © Ipsos | DOC Public Pulse of Conservation – Monthly Topline Report



‘THRIVE’ MODULE

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

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



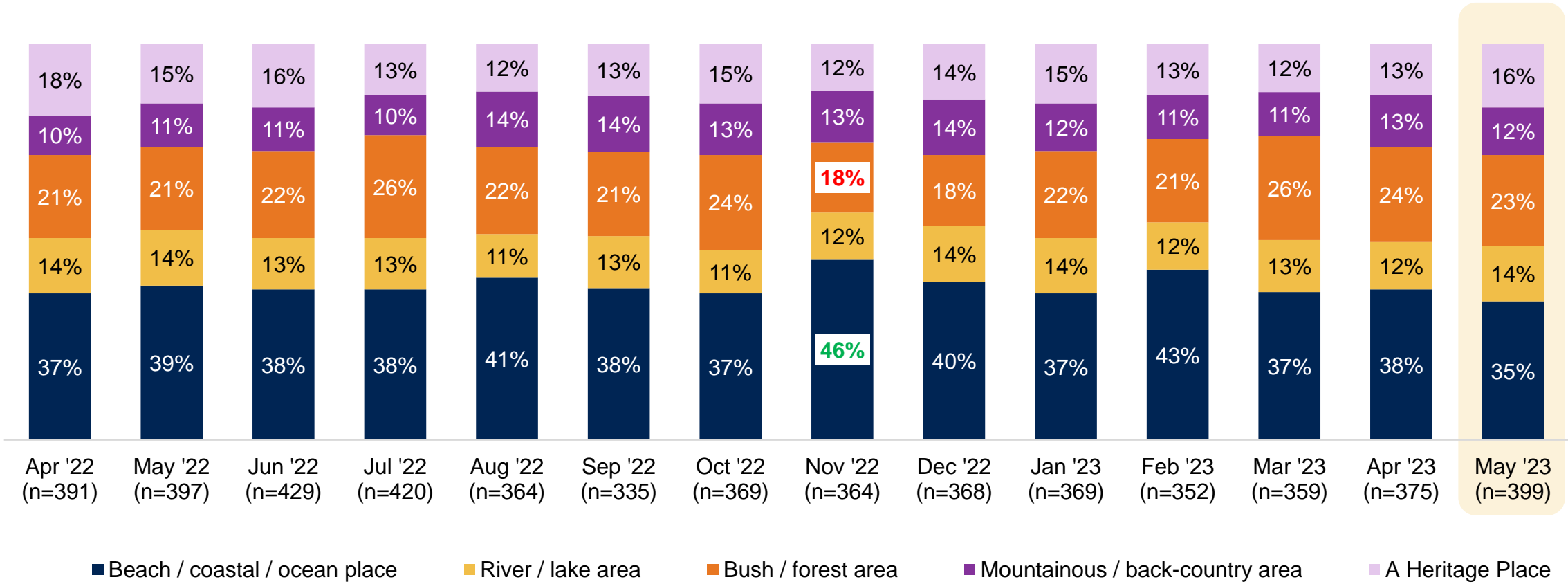
Green / red indicates significantly higher / lower than previous month

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 type of location of Protected Natural Areas that are of personal importance remained generally stable this month.

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



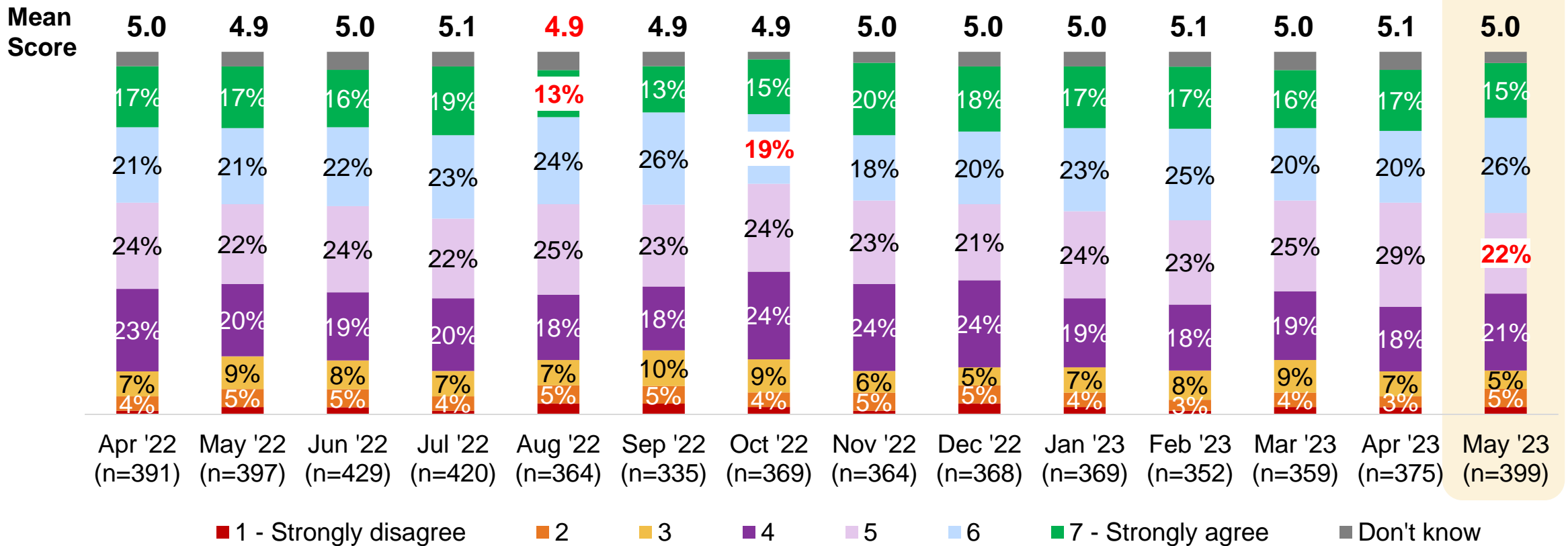
Green / red indicates significantly higher / lower than previous month

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 agree that *visitors enable local stories, identities & traditions to be shared* decreased this month. This is stable with a year ago.

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



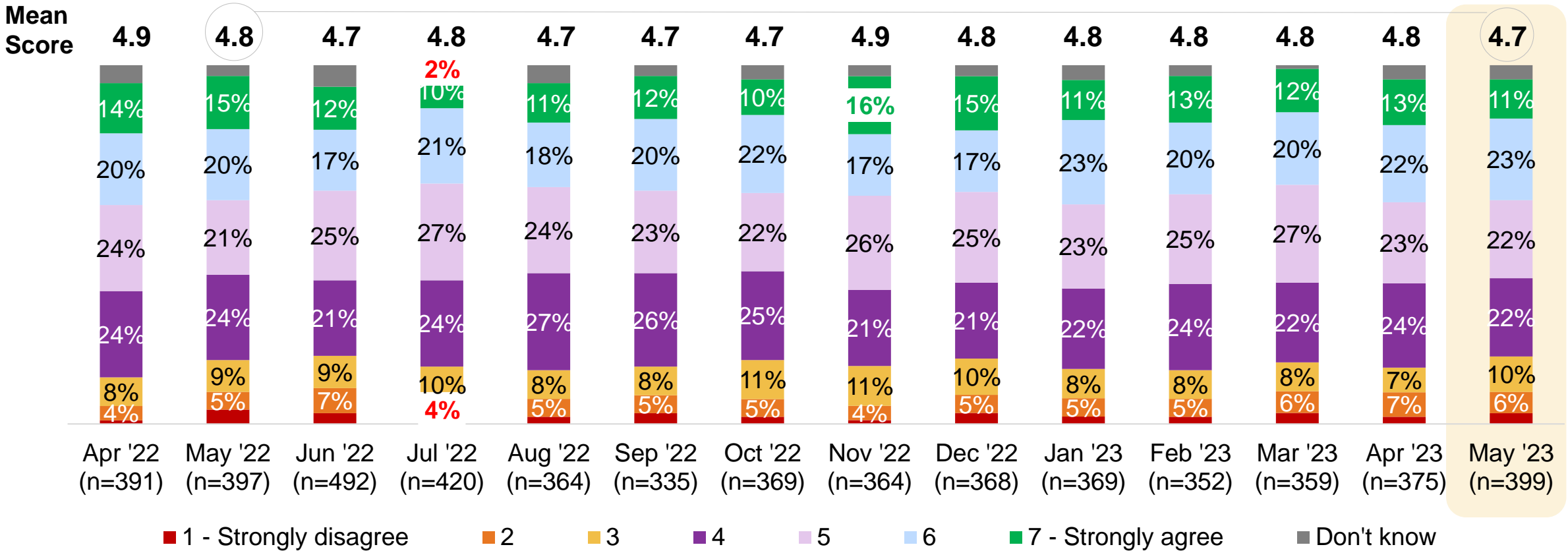
Green / red indicates significantly higher / lower than previous month

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* decreased slightly compared to last month.

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



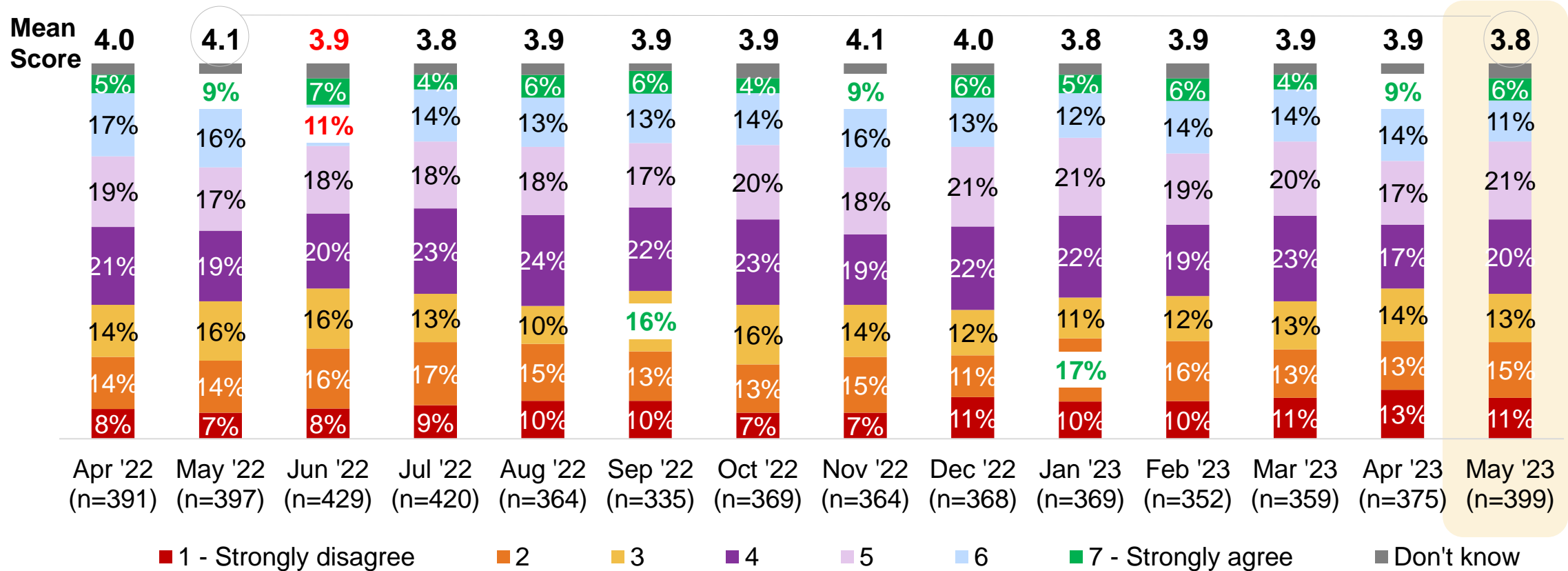
Green / red indicates significantly higher / lower than previous month

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

Base: Those who live near or regularly visit this place

Agreement by people who live near or regularly visit a Protected Natural Area that this location is *damaged by visitors* is lower compared to a year ago.

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



Green / red indicates significantly higher / lower than previous month

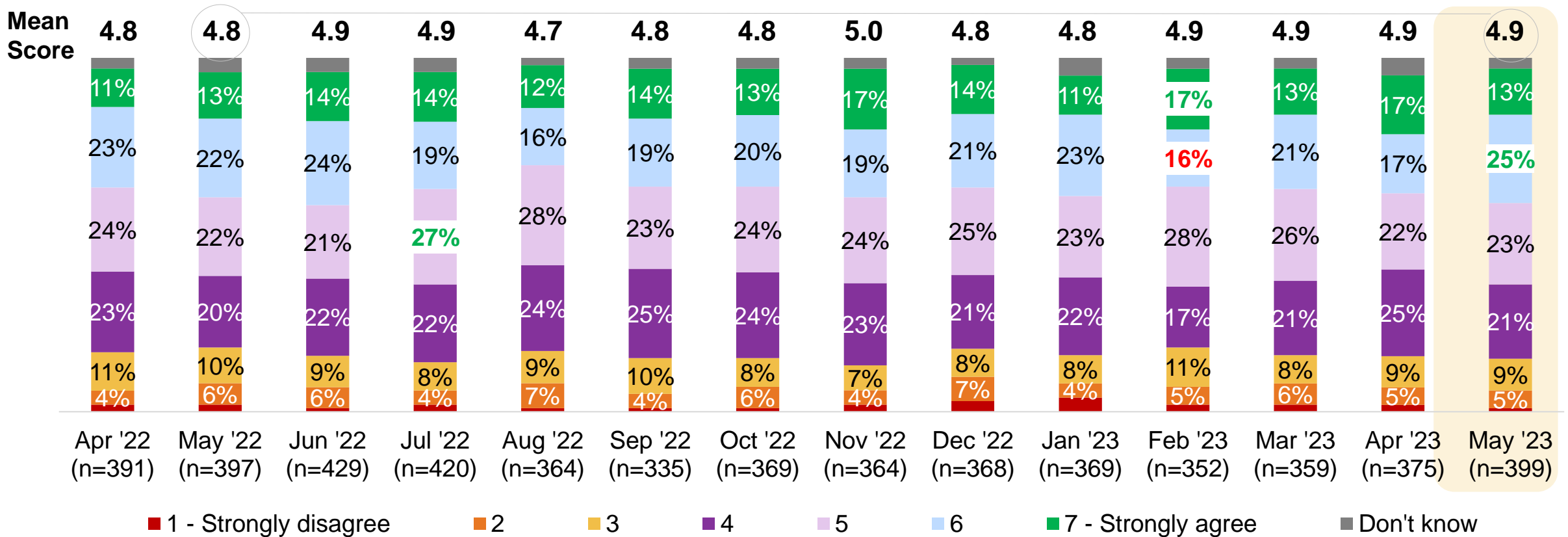
Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place

The number of visitors who agree that PNA visitors help ensure the areas they visit are protected and improved significantly increased compared to last month. Compared to a year ago this is higher.

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”

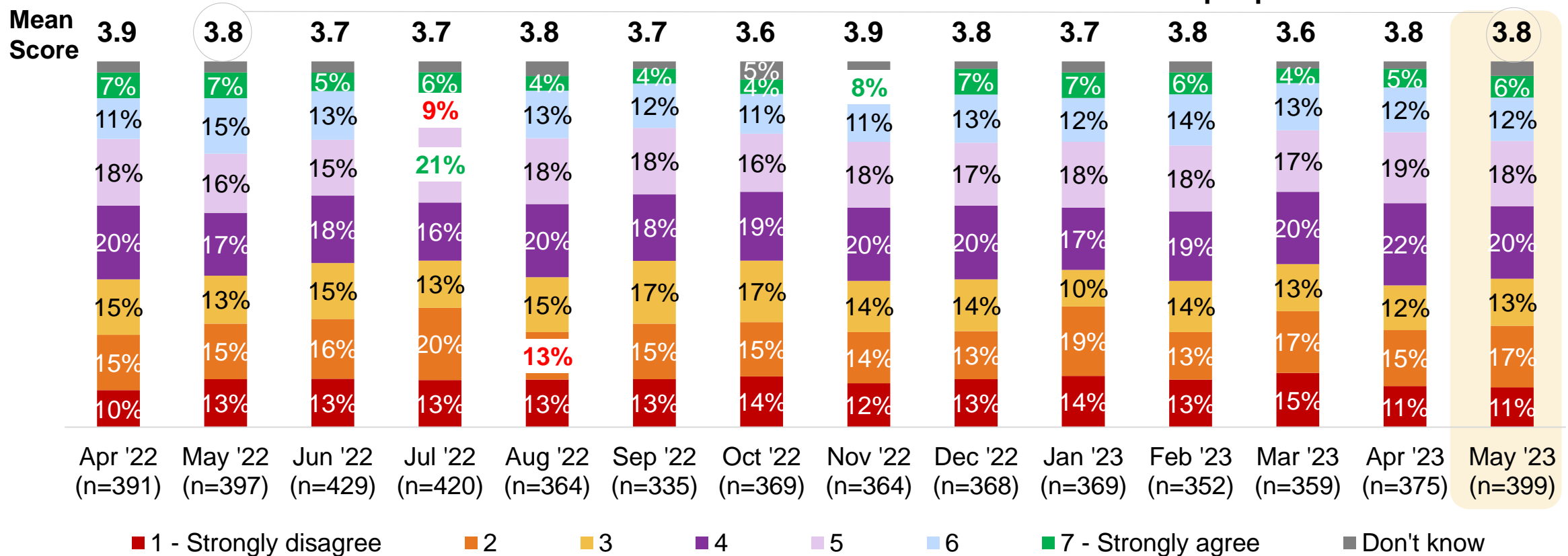


Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place

Agreement that *visitors affect the attractiveness of a Protected Natural Area* remained stable compared to last month.

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



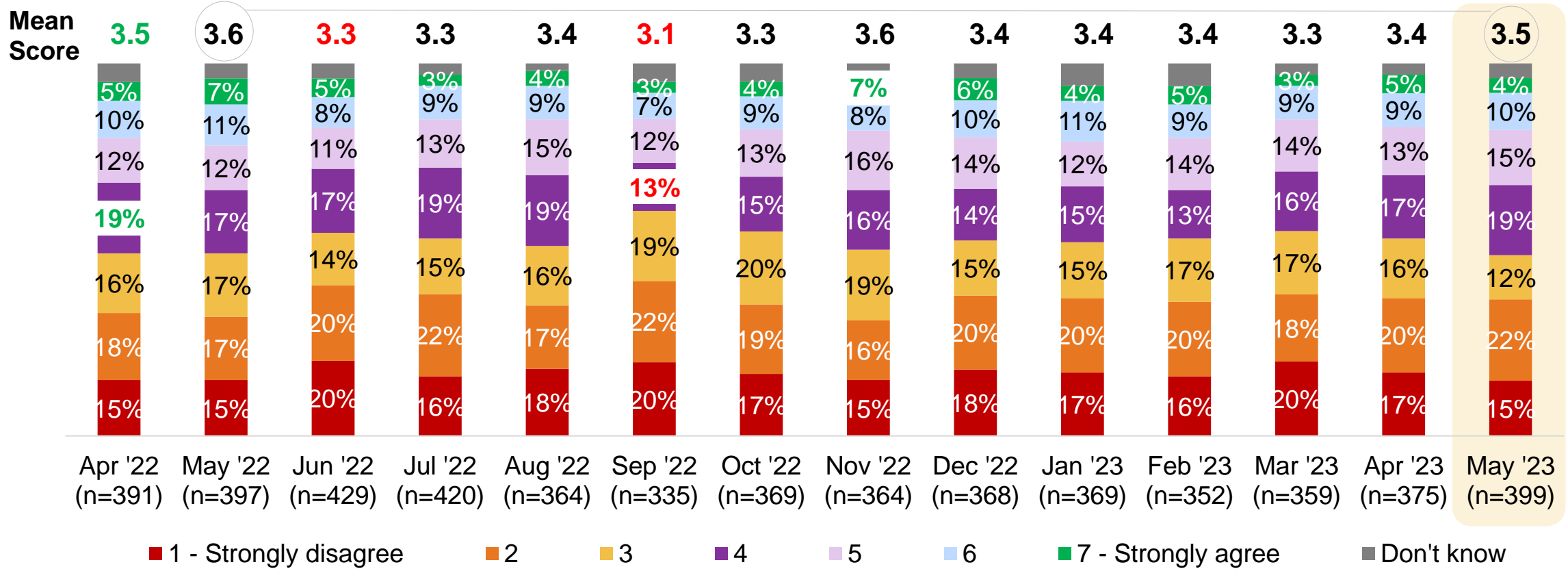
Green / red indicates significantly higher / lower than previous month

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

Base: Those who live near or regularly visit this place

Agreement that *visitors weaken local traditions & cultures* increased slightly when compared to last month.

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



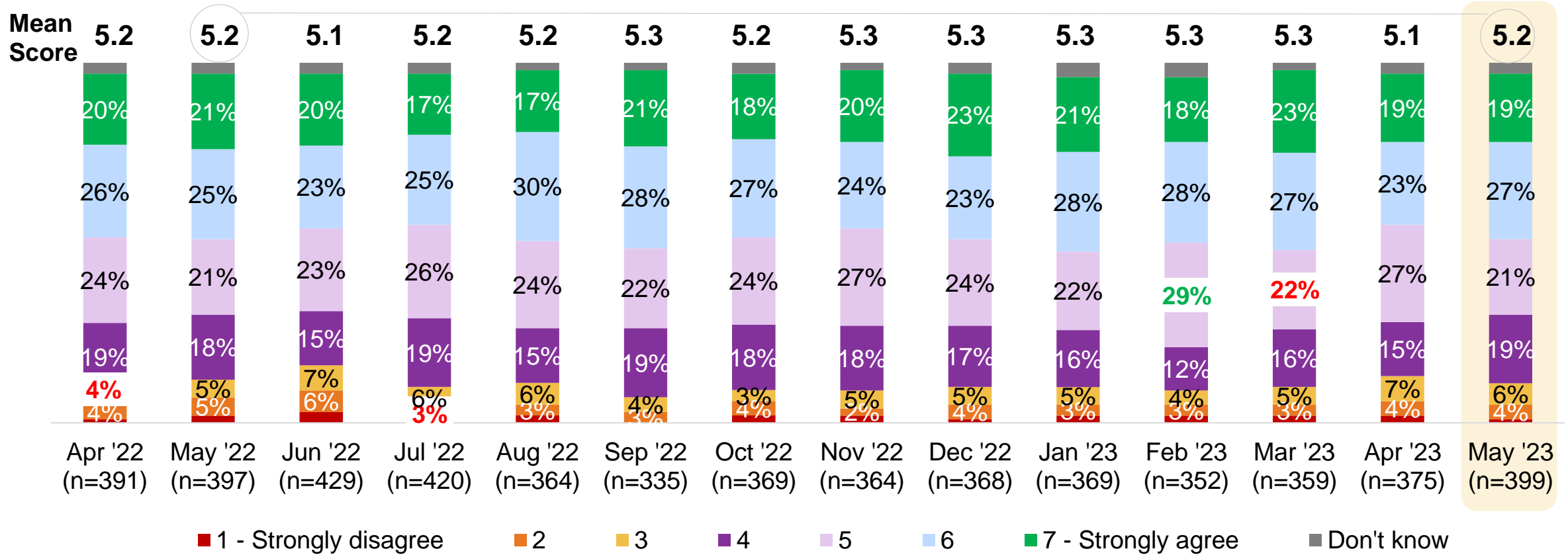
Green / red indicates significantly higher / lower than previous month

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

Base: Those who live near or regularly visit this place

Compared to last month, more people agreed that *PNA visitors improve the local economy*.

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



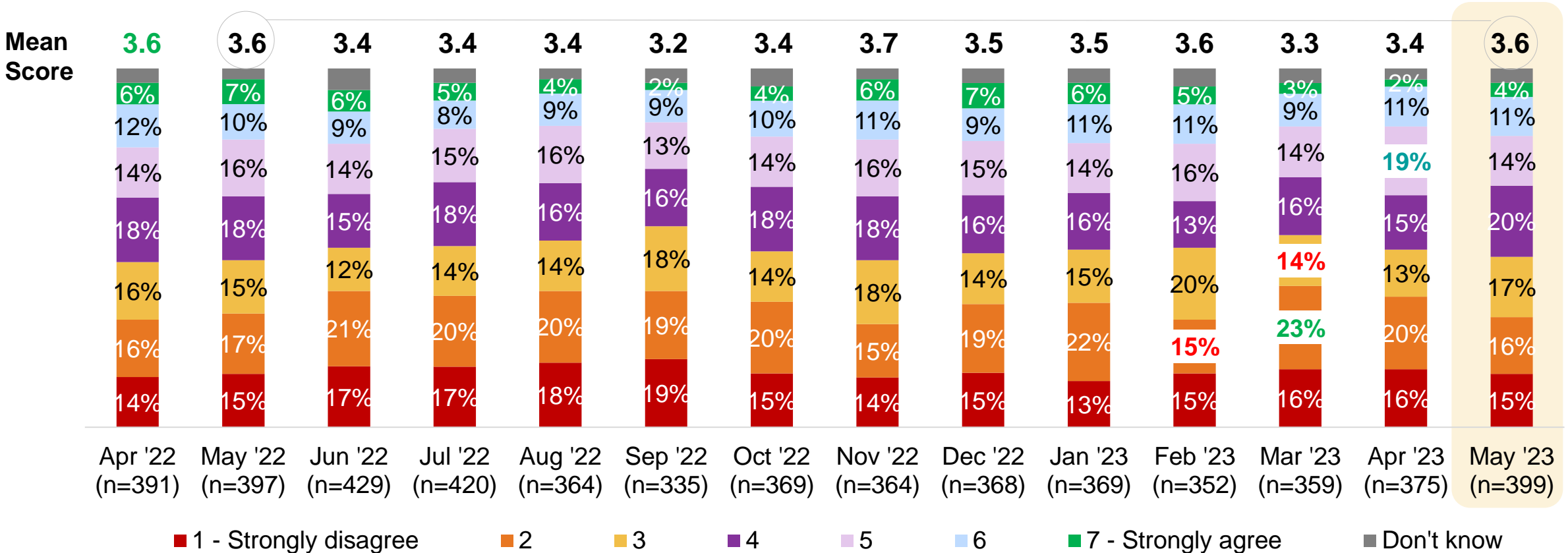
Green / red indicates significantly higher / lower than previous month

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

Base: Those who live near or regularly visit this place

Compared to last month, the number of people who agreed that *visitors add unwanted financial burdens to local communities* increased.

“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 / lakes*, *back country* and *beach / coast* communities. Impressions are neutral for *bush / forest* communities.

		Mean*				
						
		Beach / Coast	River / Lakes	Bush / Forest	Back-Country	Heritage Place
		2,795	928	1,603	864	1,066
		Total				
		7,256				
		n=				
Positive Effects	Visitors to this Protected Natural Area improve the local economy	5.2	5.3	5.2	5.0	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	5.4
	Visitors to this Protected Natural Area help ensure the areas they visit are protected & improved	4.8	4.8	4.9	4.9	4.7
	Visitors to this Protected Natural Area improve the quality of life of the local communities	4.8	4.7	4.8	4.6	4.9
	AVERAGE AGREEMENT WITH POSITIVE STATEMENTS (<i>higher numbers are better</i>)	5.0	4.9	5.0	4.8	4.9
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
	Visitors to this Protected Natural Area make it less attractive for local people to visit the Protected Natural Area	3.8	3.8	4.0	3.5	3.9
	Visitors to this Protected Natural Area add unwanted financial burdens onto the local communities	3.5	3.5	3.7	3.3	3.5
	Visitors to this Protected Natural Area weaken the local communities' traditions & cultures	3.4	3.4	3.7	3.1	3.5
	AVERAGE AGREEMENT WITH NEGATIVE STATEMENTS (<i>lower numbers are better</i>)	3.7	3.7	3.9	3.4	3.8

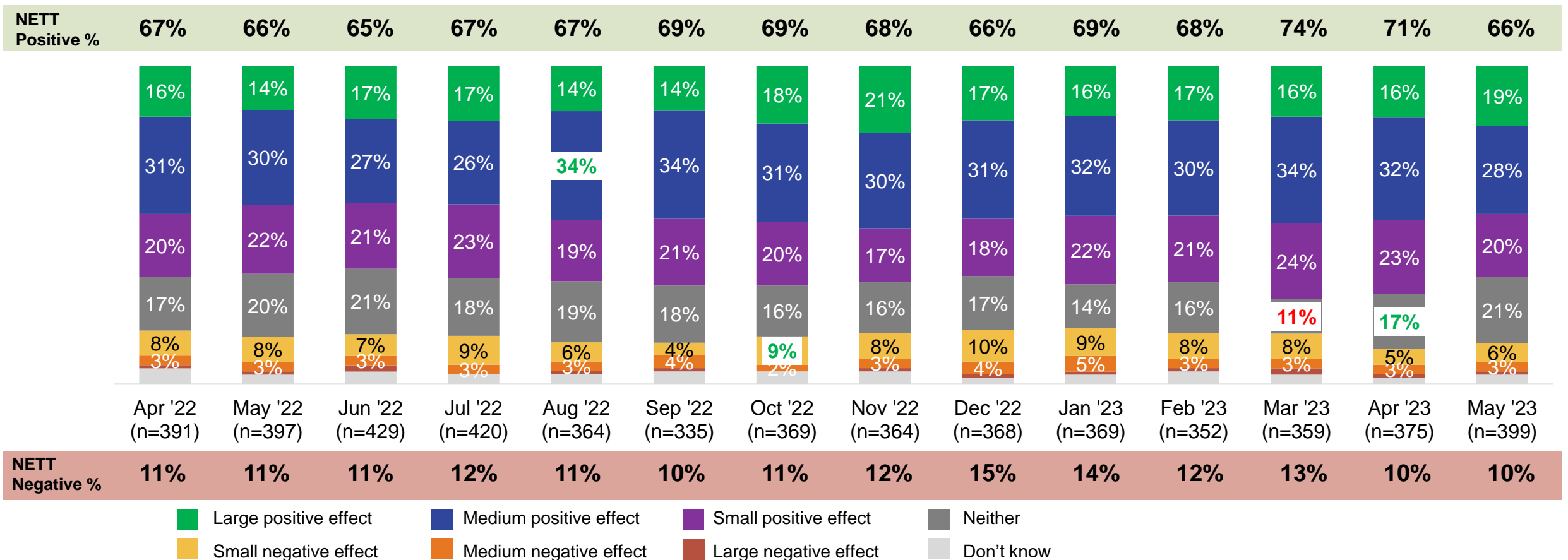
Green / red indicates significantly higher / lower than total

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.

Compared to last month, fewer residents & visitors to Protected Natural Areas agreed that visitors had a positive effect on the area.

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

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.

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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

