

DOC PUBLIC PULSE OF CONSERVATION

Monthly Topline Report – December 2022

Jonathan Dodd

22 December, 2022



GAME CHANGERS



KEY FINDINGS – DECEMBER '22

- Visits to DOC-managed places have fallen slightly when compared with the last couple of months, possibly due to the overly-wet spring, but visits to Protected Natural Areas are still higher than last December (during which Auckland was in lockdown until Dec 15th).
- The average number of visits to Protected Natural Areas and Protected Heritage Places has also fallen this month, stable with levels seen last December. This follows after average visits to Protected Natural Areas were the highest recorded last month.
- Visitor satisfaction at Protected Natural Areas for the condition of trails and facilities has increased compared to last month.
- The main issue of concern relates to Protected Heritage Places:
 - Protected Heritage Places' NPS has decreased due to an increase in Detractors and a decrease in Promoters.
 - Overall experience at PHPs has also decreased.
 - Visitor satisfaction with the safety information at Protected Heritage Places has decreased compared to last month.



SUMMARY


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

BACKGROUND & METHODOLOGY



Sample size

1,000




Fieldwork dates
December 5-19, 2022

Interview duration
5 minutes



Methodology

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



Weighting procedures

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

Previous waves

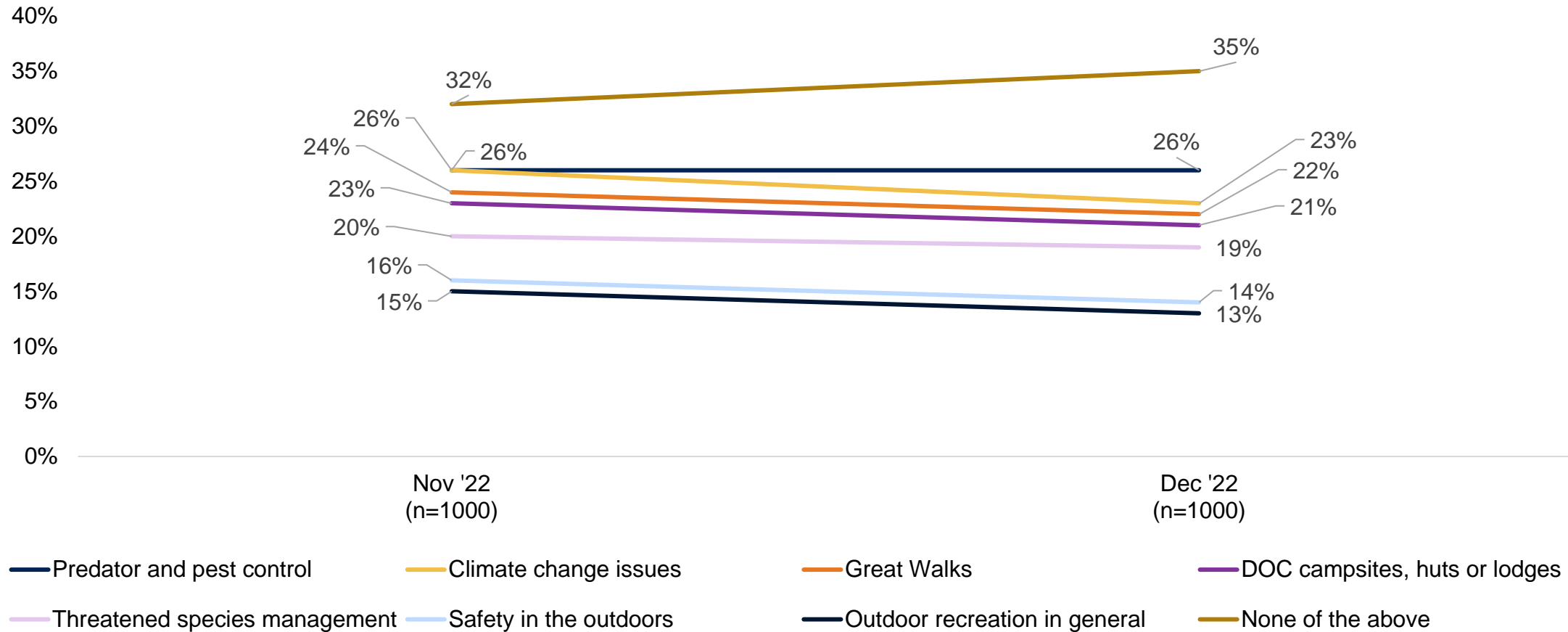
Jun 21	10–21 June, 2021
Jul 21	6–12 July, 2021
Aug 21	2–6 August, 2021
Sep 21	3–9 September, 2021
Oct 21	1–7 October, 2021
Nov 21	5–12 November, 2021
Dec 21	3–9 December, 2021
Jan 22	6–15 January, 2022
Feb 22	5–15 February, 2022
Mar 22	3–10 March, 2022
Apr 22	1–11 April, 2022
May 22	5–16 May, 2022
Jun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

DOC MEDIA PROFILE



The main issues people recall from DOC relate to *predator and pest control* and *climate change*. There appears to have been an overall decrease in all mentions of DOC over the past month.

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

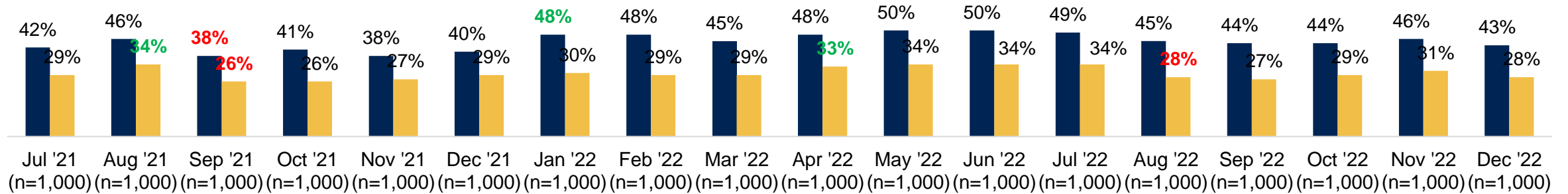


Q50: Which, if any, of the following aspects of the Department of Conservation have you seen, read, or heard about in the past 4 weeks? *Note: Responses less than 15% are excluded

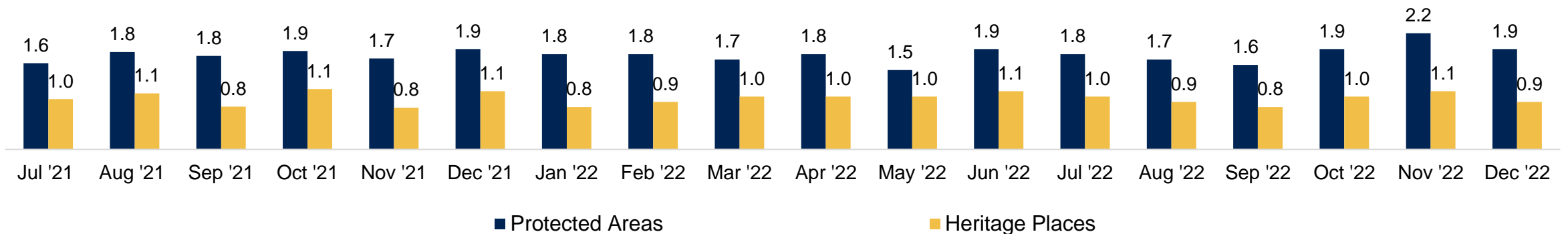
VISITATION FREQUENCY

After a few strong months of visits to PNAs, visitation has fallen slightly (possibly due to the weather) but is still 3% higher than last December.

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



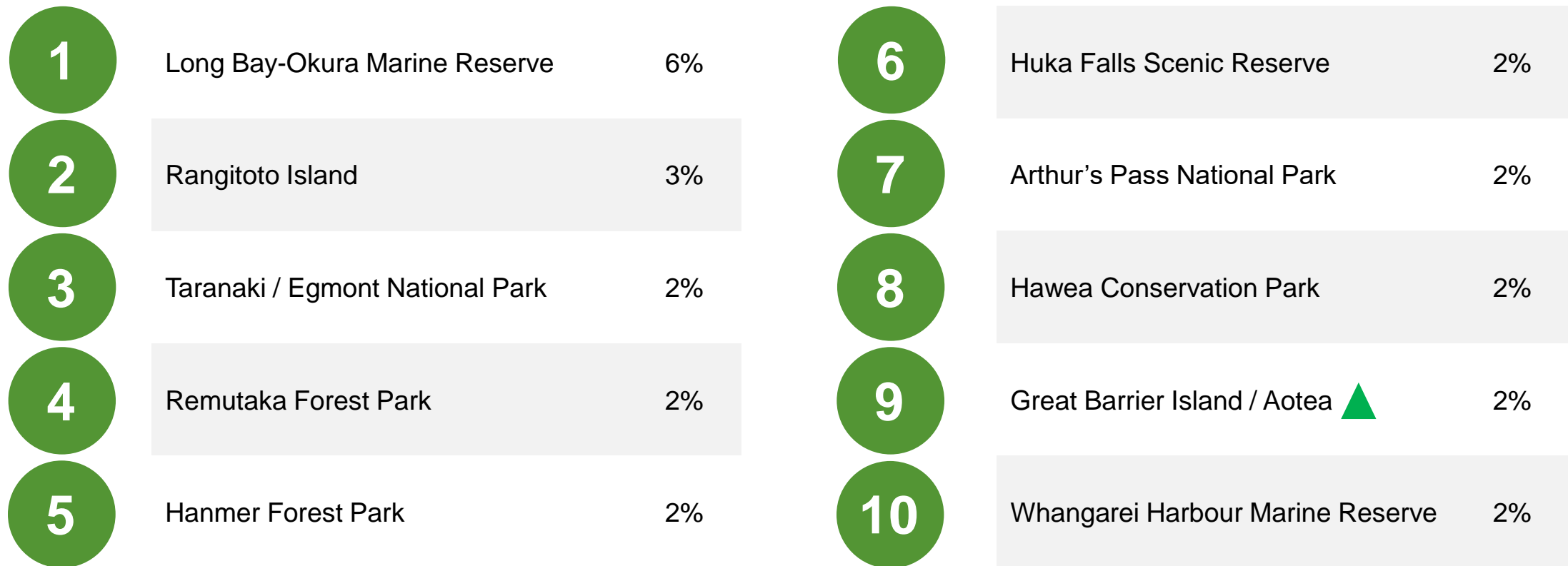
Average number of visits in the last month*



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–DEC 2022.

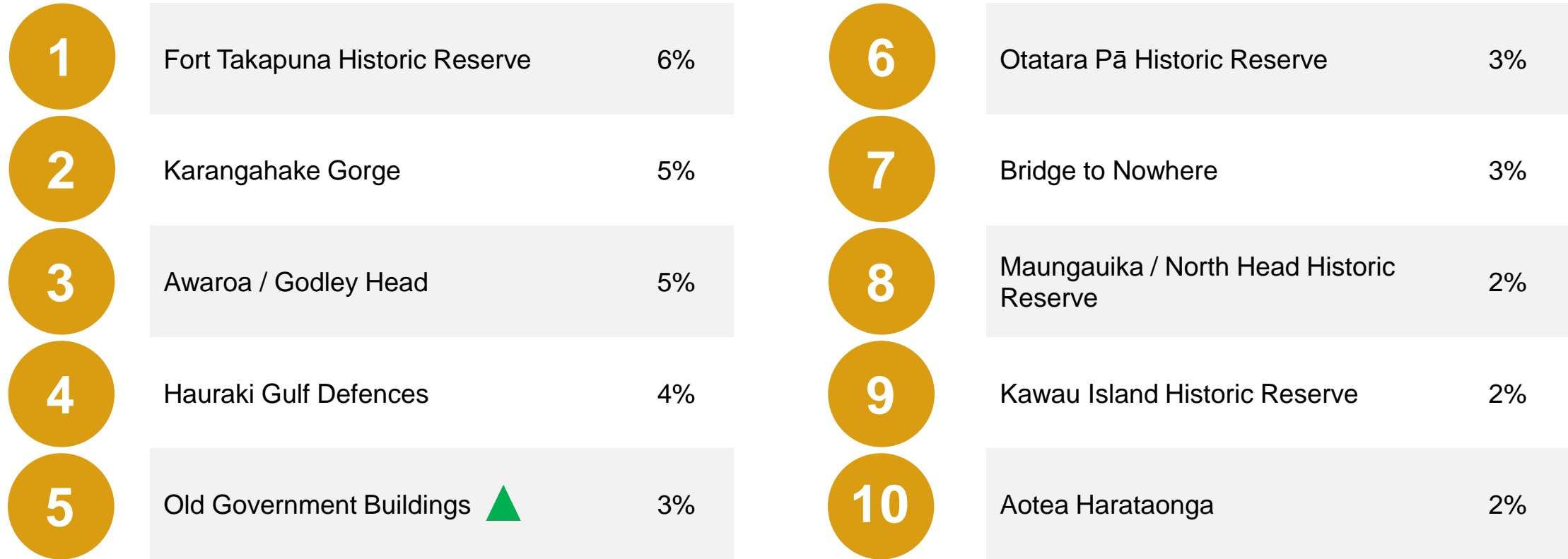


Green / red indicates Increase / decrease in rank position compared to previous month

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=8,027)

TOP-10 PROTECTED HERITAGE PLACES VISITED: JUN 2021–DEC 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=5,363)

Short walks & sightseeing remain the most common activities at Protected Natural Areas.

Top activities when visiting Protected Natural Areas*

	Total	Jun'21	Jul'21	Aug'21	Sep'21	Oct'21	Nov'21	Dec'21	Jan'22	Feb'22	Mar'22	Apr'22	May'22	Jun'22	Jul'22	Aug'22	Sep'22	Oct'22	Nov'22	Dec'22
Base (n=)	8,460	397	422	464	380	407	379	401	478	477	450	484	504	498	492	451	436	442	465	433
Short walk (<3 hours)	38%	37%	38%	36%	38%	35%	33%	33%	41%	33%	41%	38%	38%	38%	38%	44%	42%	40%	41%	41%
Sightseeing	30%	29%	28%	29%	32%	29%	29%	24%	31%	27%	30%	30%	32%	31%	30%	35%	34%	28%	31%	27%
Bird / wildlife watching	25%	25%	27%	28%	24%	26%	26%	24%	22%	20%	24%	25%	24%	24%	25%	26%	24%	24%	24%	27%
Photography	25%	25%	29%	26%	26%	21%	22%	21%	24%	24%	27%	24%	25%	24%	25%	26%	26%	26%	27%	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%	23%	23%	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%
Connecting with nature	23%	22%	21%	25%	22%	17%	25%	21%	21%	21%	24%	24%	25%	25%	26%	20%	22%	25%	22%	21%
Connecting with history	13%	10%	13%	14%	14%	11%	17%	10%	12%	11%	16%	14%	14%	13%	13%	10%	13%	17%	15%	15%
Camping	12%	15%	14%	12%	14%	14%	14%	12%	16%	14%	13%	12%	11%	11%	11%	11%	8%	10%	11%	11%
Connecting with culture	10%	8%	9%	11%	11%	8%	11%	12%	10%	11%	10%	10%	12%	7%	11%	8%	8%	13%	11%	10%

Green / red indicates significantly higher / lower than previous month

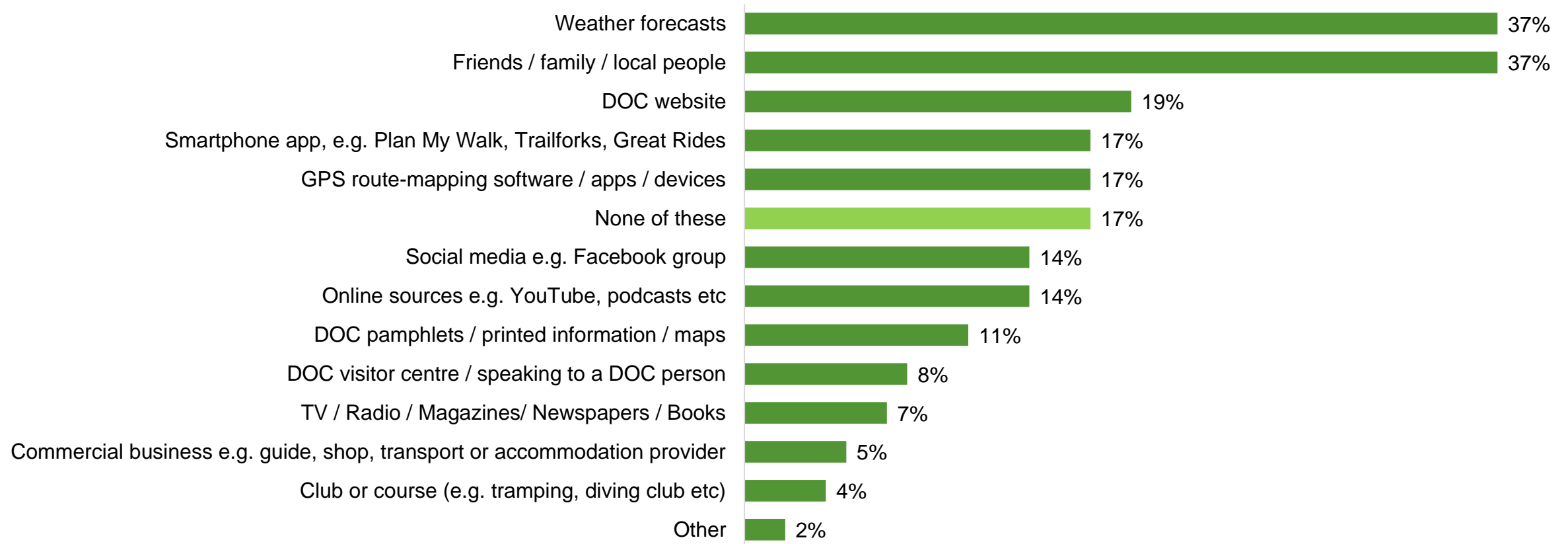
Q12: Thinking about your most recent visit to <LOCATION SELECTED IN Q8>, which of the following activities did you engage in?

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 are the most commonly cited information used for planning visits to Protected Natural Areas.

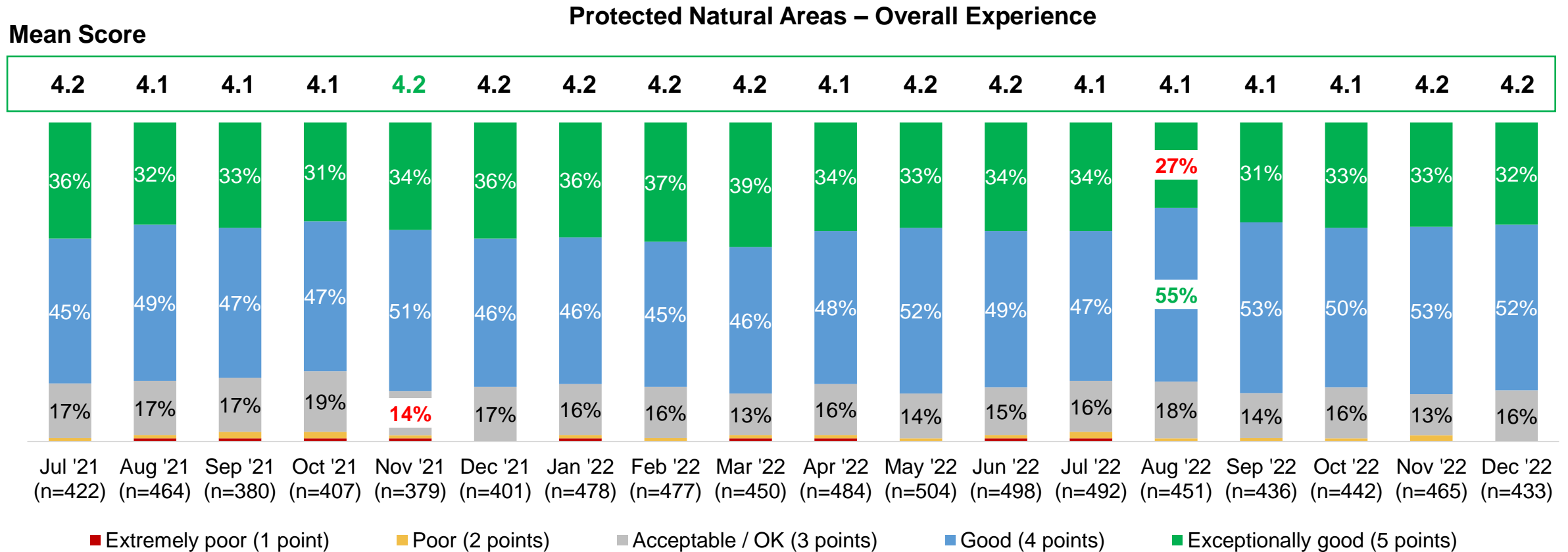
Sources of Information used for Planning



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=898)

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



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 increased this month.

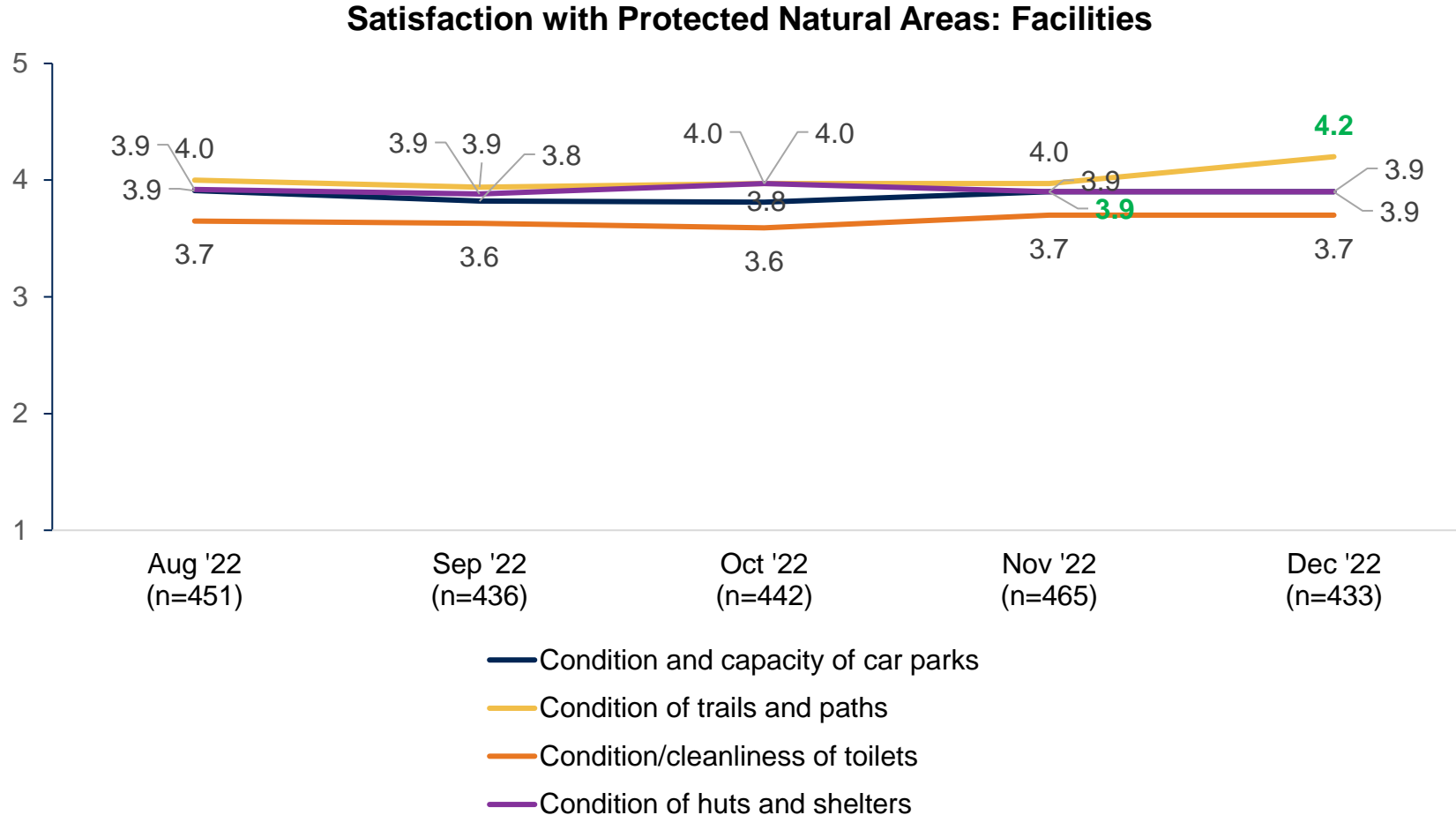
5=Excellent*

↑

Mean scores

↓

1=Terrible



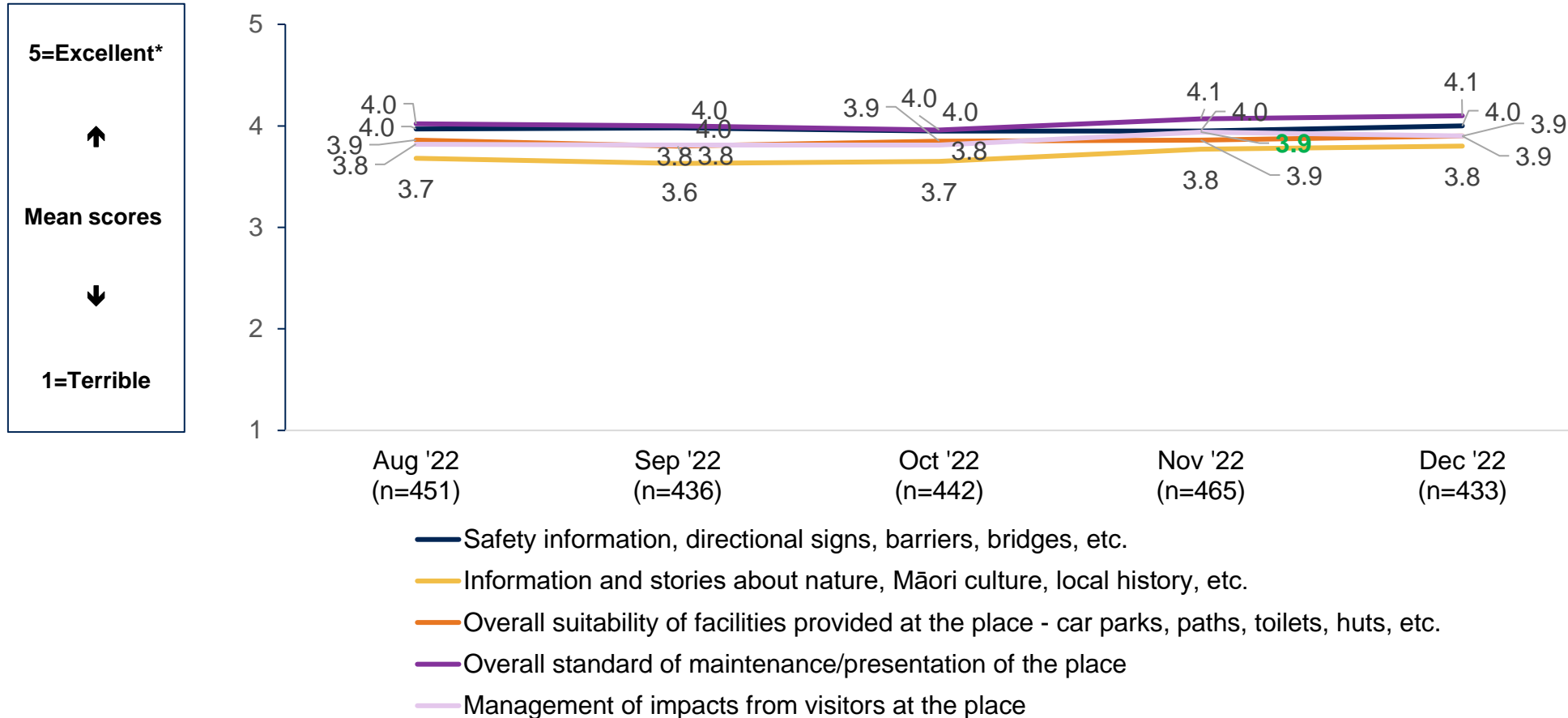
Green / red indicates significantly higher / lower than previous month

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 of the *management of impacts from visitors* at Protected Natural Areas remains high after an increase last month.

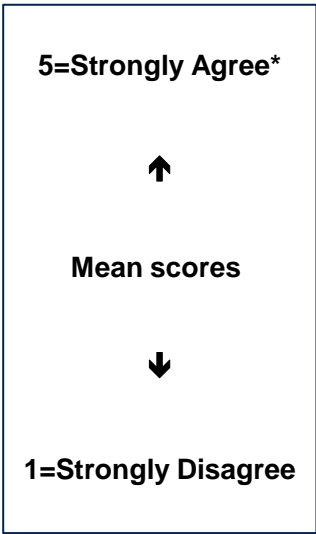
Satisfaction with Protected Natural Areas: Signage and Maintenance



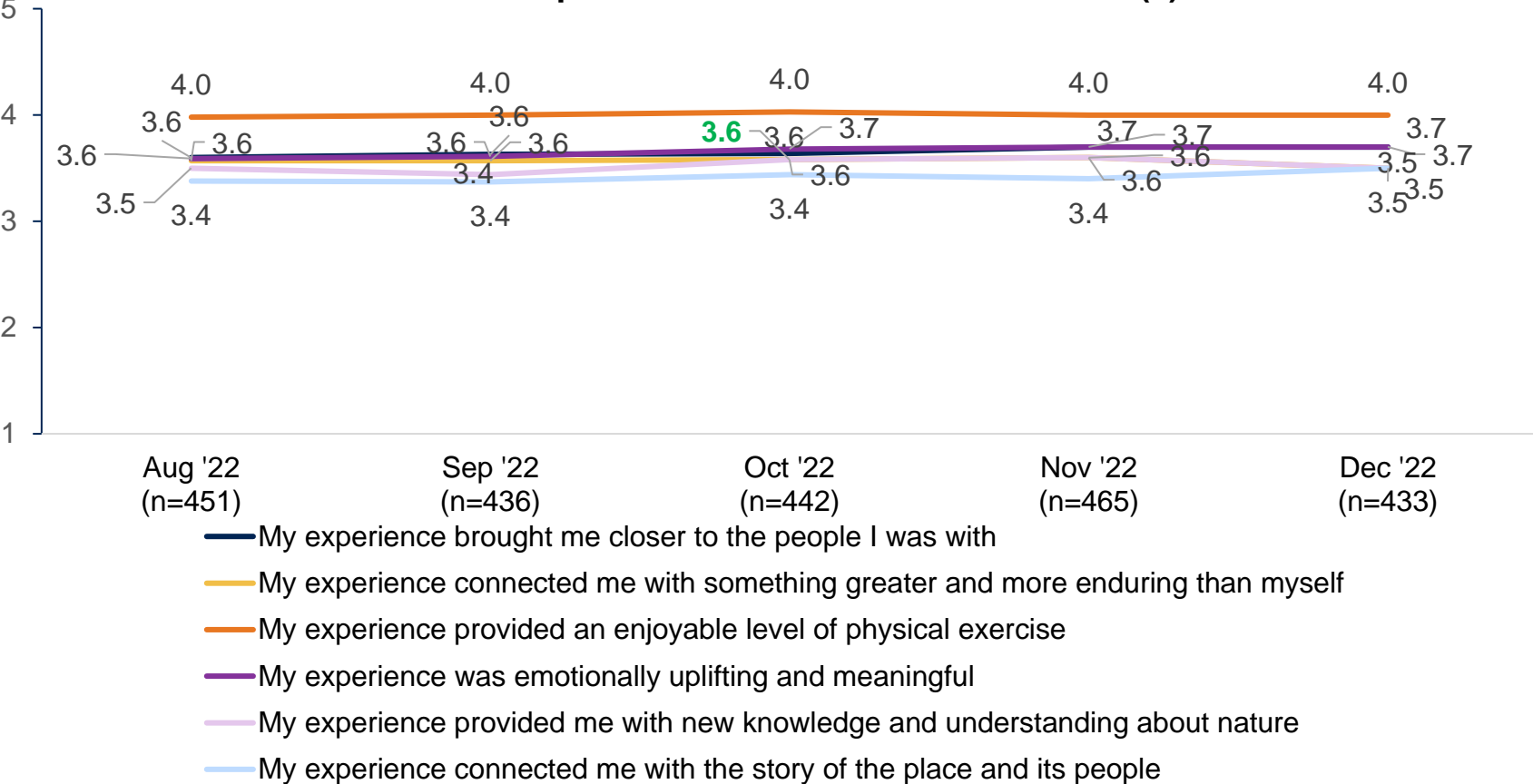
Q14a: Still thinking about your most recent visit to <LOCATION SELECTED IN Q8>, how would you rate the following aspects listed below?

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.

Visits to Protected Natural Areas continue to be well-rated, especially for the exercise.



Personal Experience at Protected Natural Areas (1)



Green / red indicates significantly higher / lower than previous month

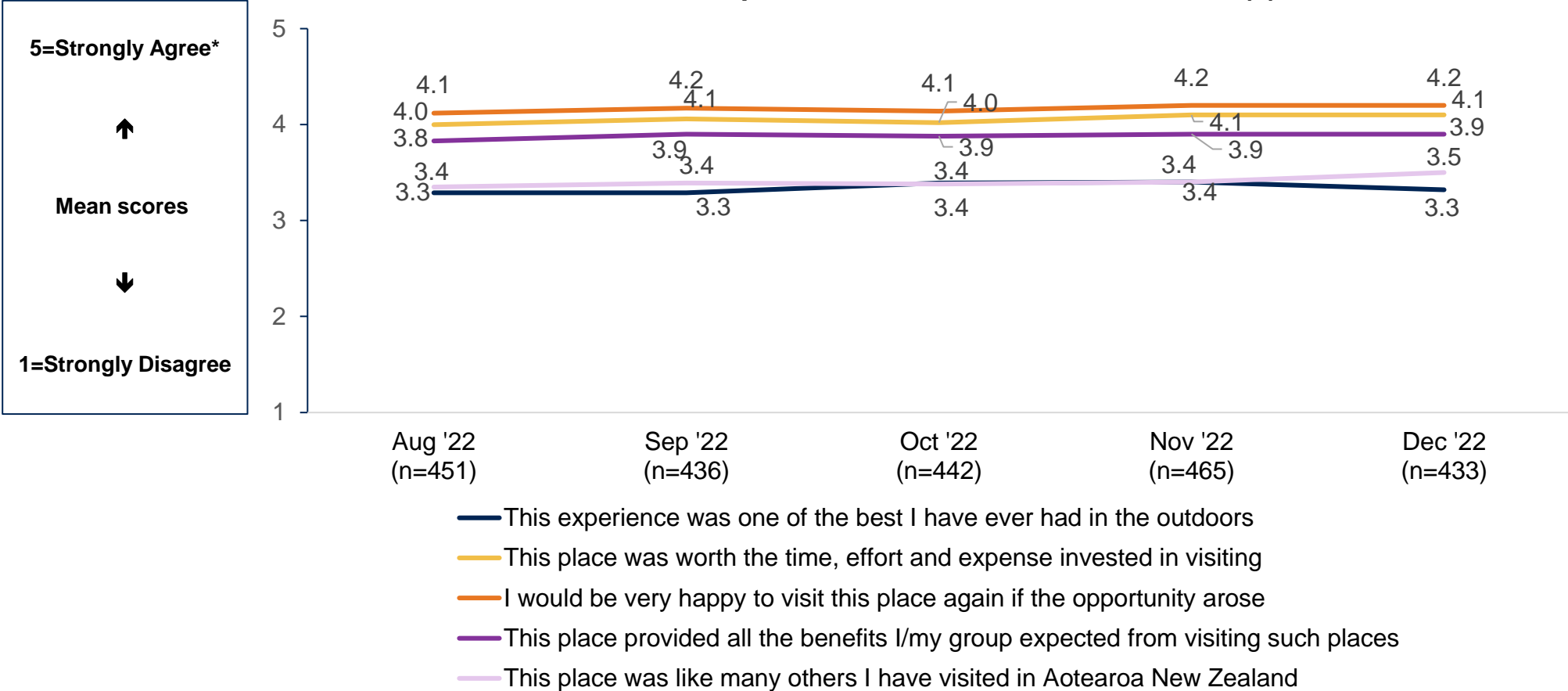
Q14b: Still thinking about your most recent visit to <LOCATION SELECTED IN Q8>, how much do you agree or disagree with each of the statements below?

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



Most feel that they would be happy to revisit the Protected Natural Areas they had been to; fewer felt that their experience was one of the best ever had outdoors.

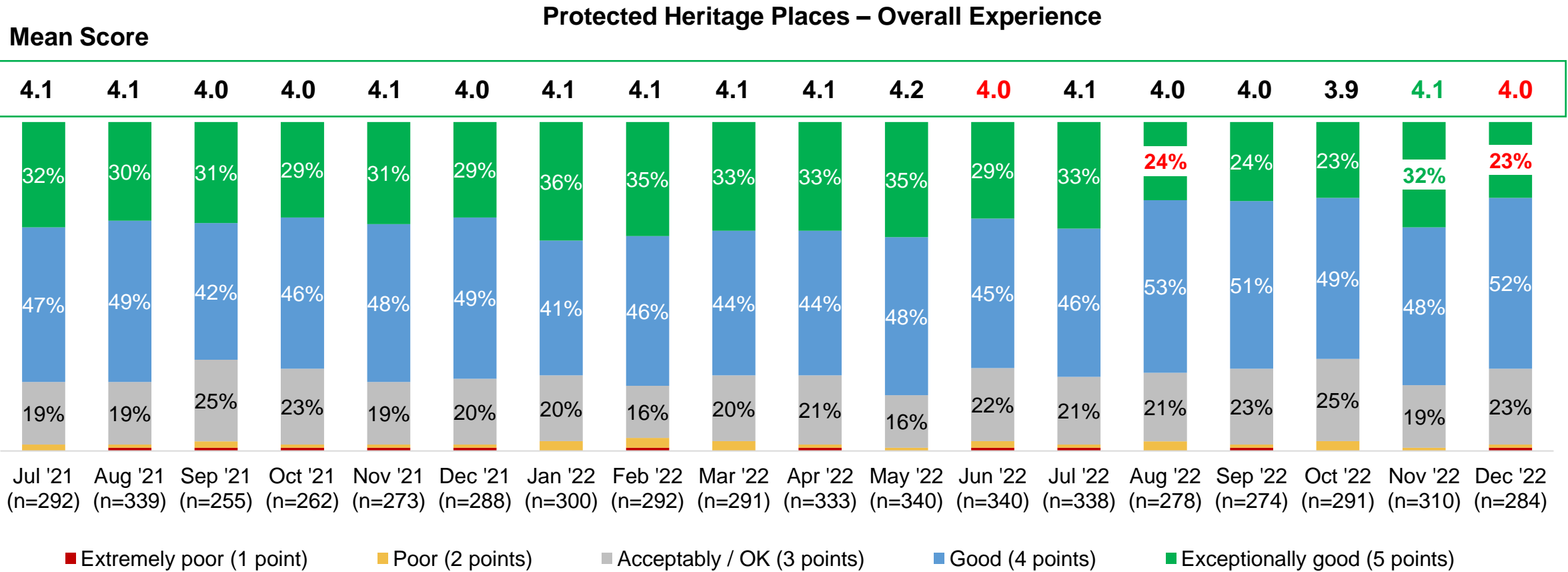
Personal Experience at Protected Natural Areas (2)



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: Higher mean scores are desirable.

Satisfaction with the overall experience at Protected Heritage Places has decreased following a significant increase in those having an 'exceptionally good' experience in November.



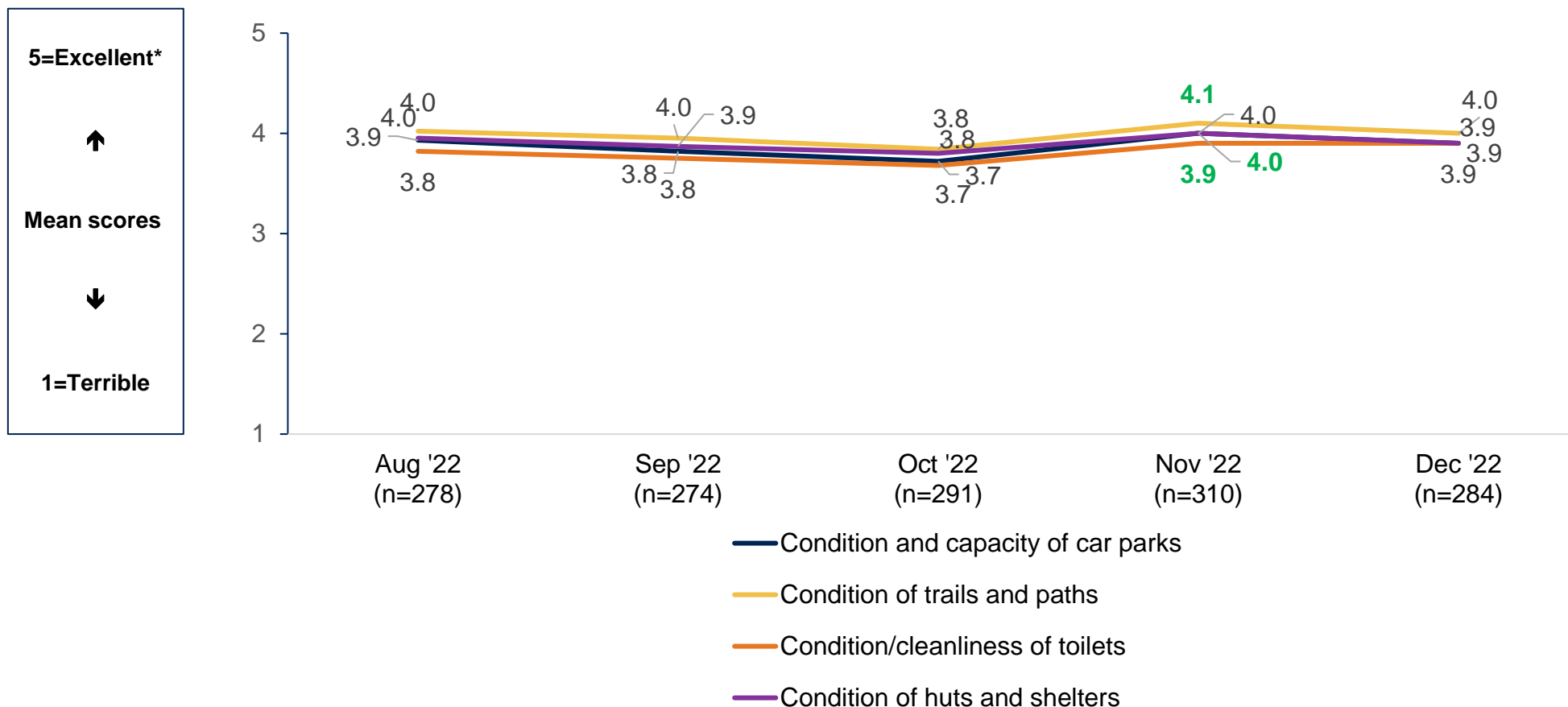
Q27: Overall, how would you rate your experience at <LOCATION SELECTED IN Q20>?

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.

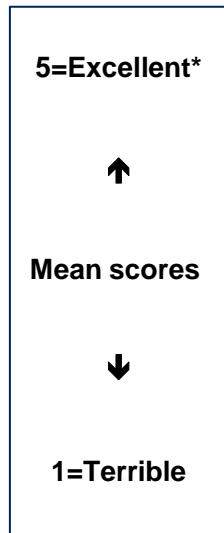
Satisfaction with Protected Heritage Places: Facilities



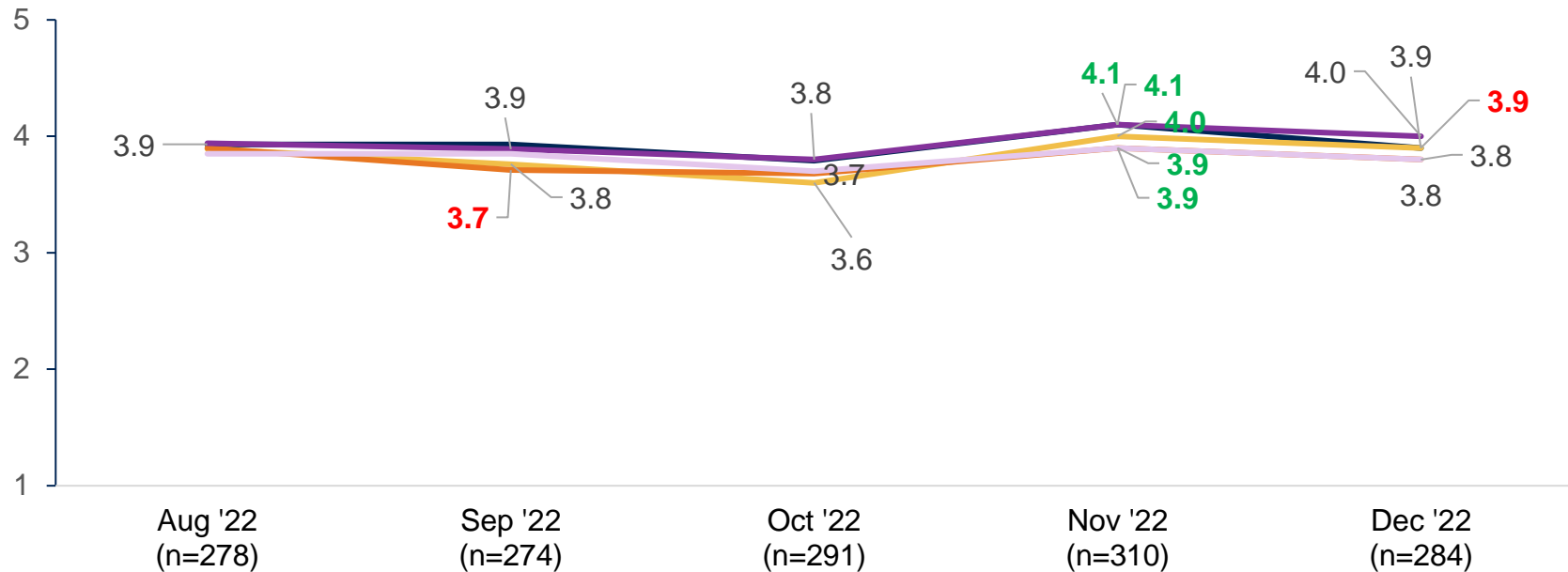
Q26a: Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how would you rate the following aspects listed below?

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 safety information has decreased following an increase in November.



Satisfaction with Protected Heritage Places: Signage and Maintenance



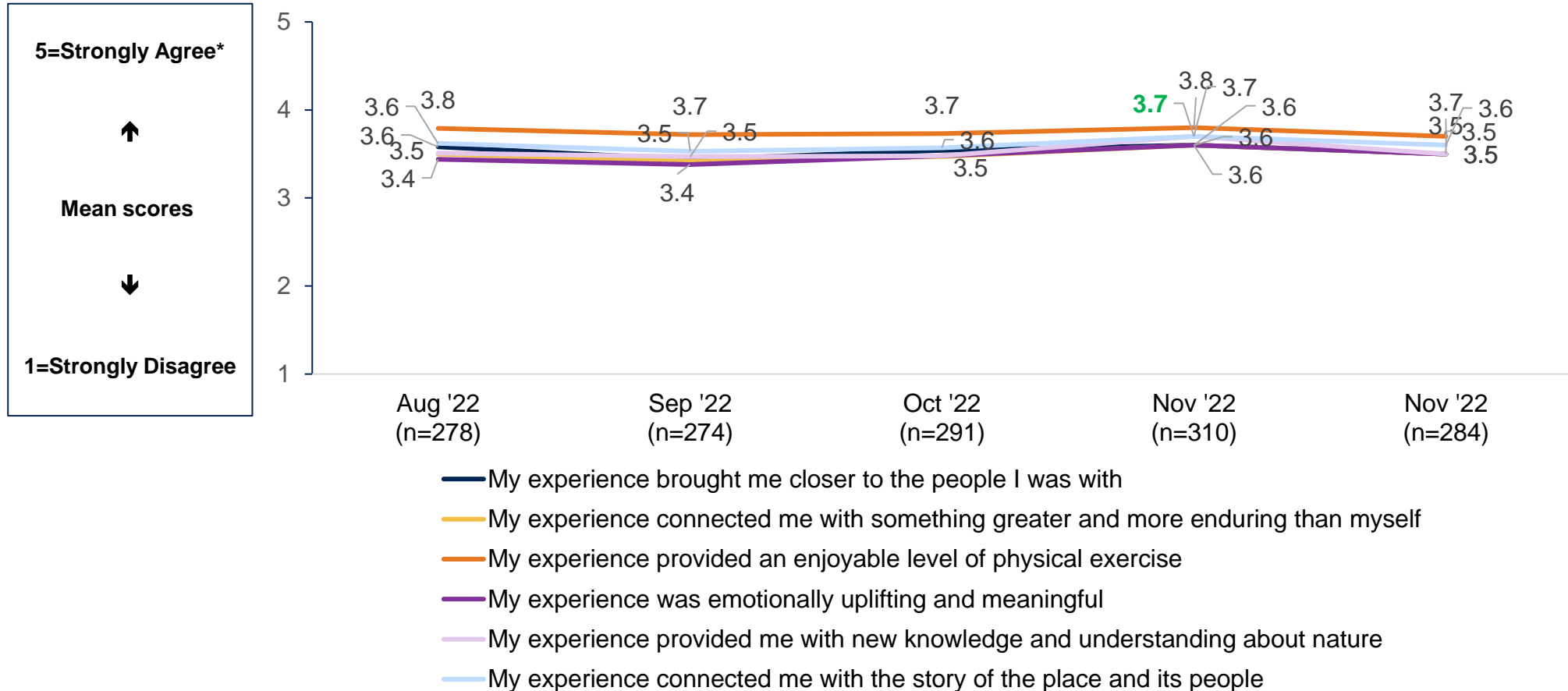
- Safety information, directional signs, barriers, bridges, etc.
- Information about nature, Māori culture, local history, etc.
- Overall suitability of facilities provided at the place - car parks, paths, toilets, huts, etc.
- Overall standard of maintenance/presentation of the place
- Management of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

All measures of personal experience remain stable and positive this month.

Personal Experience at Protected Heritage Places (1)

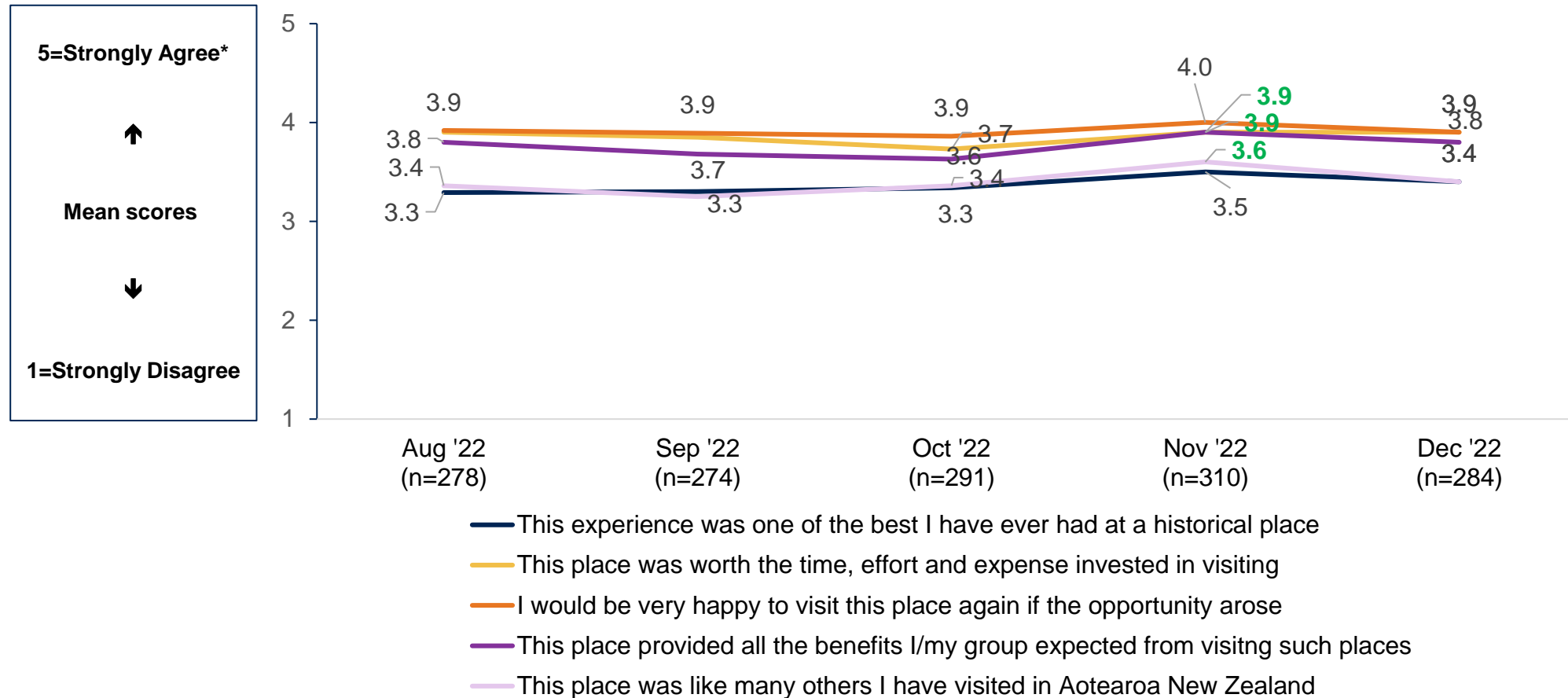


Q26b: Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how much do you agree or disagree with each of the statements below?

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

Personal experience among PHP visitors remains stable and positive compared to last month.

Personal Experience at Protected Heritage Places (2)



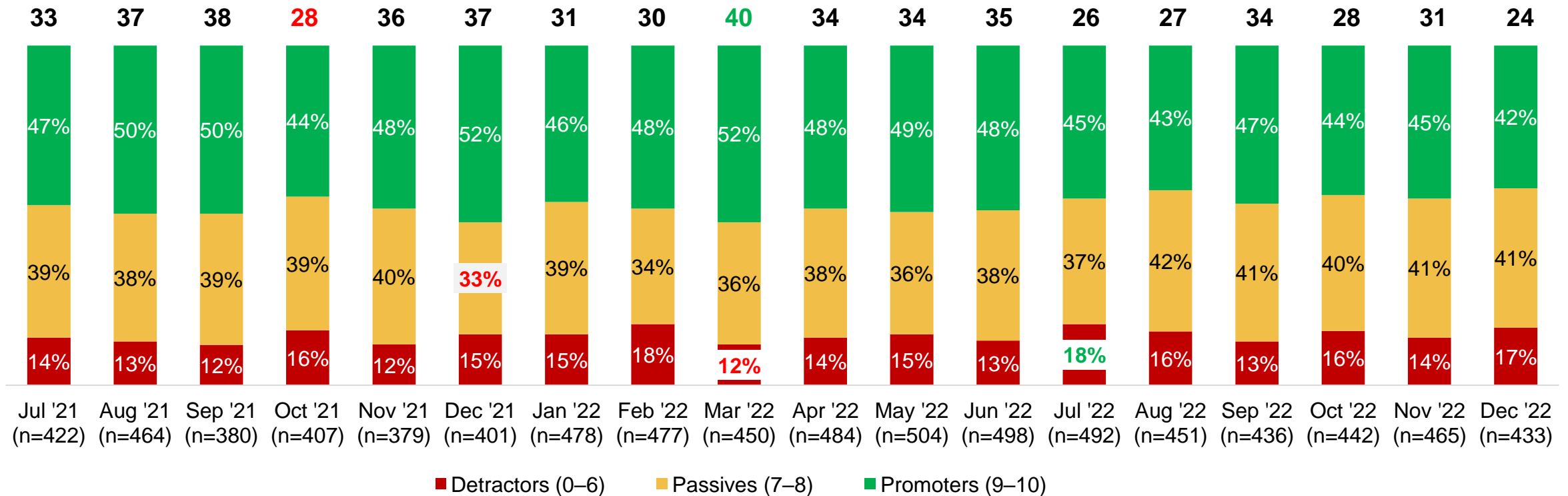
Q26b: Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how much do you agree or disagree with each of the statements below?

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

NPS

Protected Natural Areas' NPS has decreased due to a increase in Detractors.

Protected Natural Areas – NPS



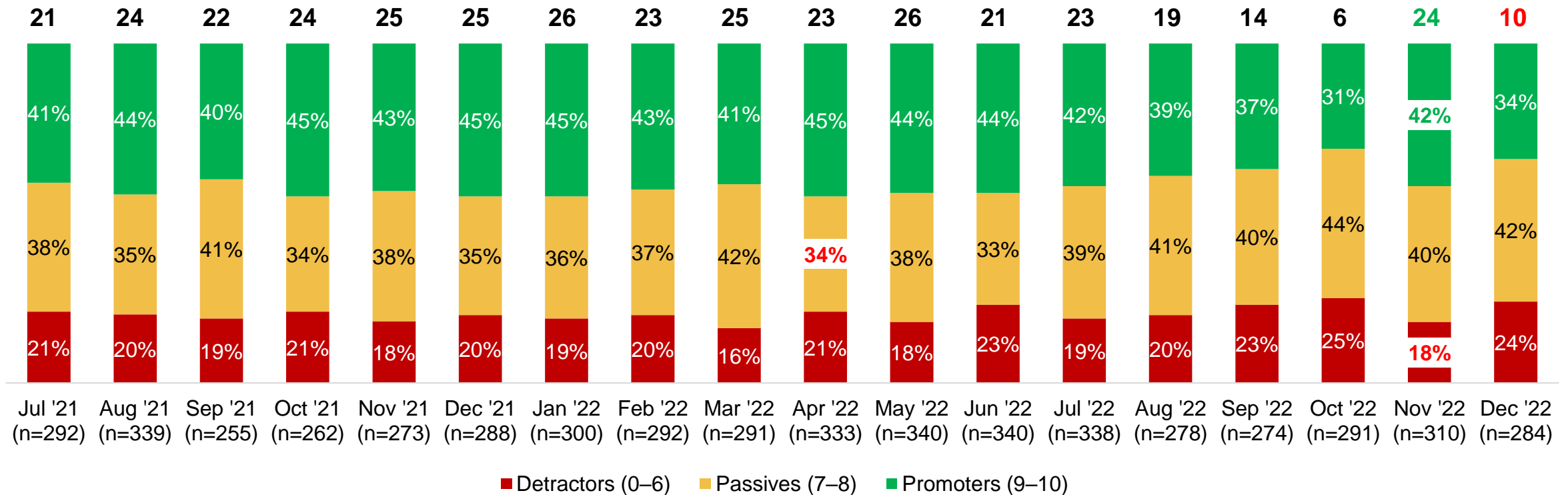
Green / red indicates significantly higher / lower than previous month

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 significantly decreased as the number of Detractors has increased and Promoters have decreased. The NPS is now at the second-lowest level we have recorded.

Protected Heritage Places – NPS



Green / red indicates significantly higher / lower than previous month

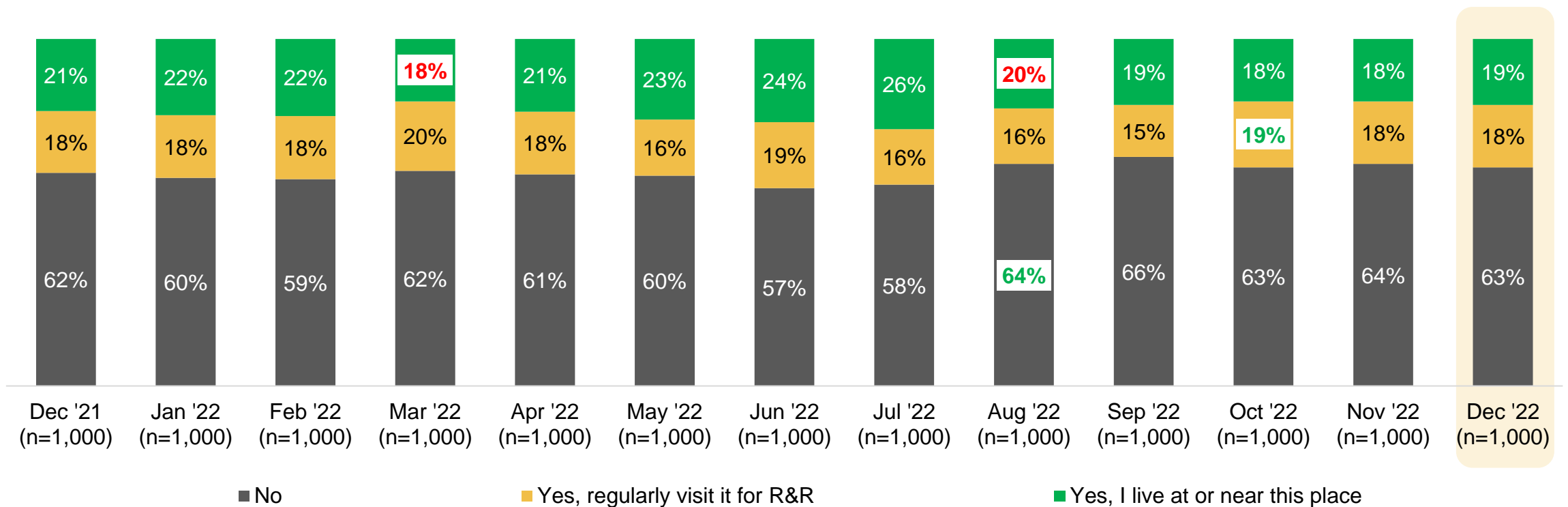
Q28: How LIKELY is it you would RECOMMEND <LOCATION SELECTED IN Q20> to your family or friends?

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

‘THRIVE’ MODULE

The number of visitors who regularly visit a PNA of personal importance to them remains unchanged after a significant increase in October (possibly due to the long Labour Day weekend in October).

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



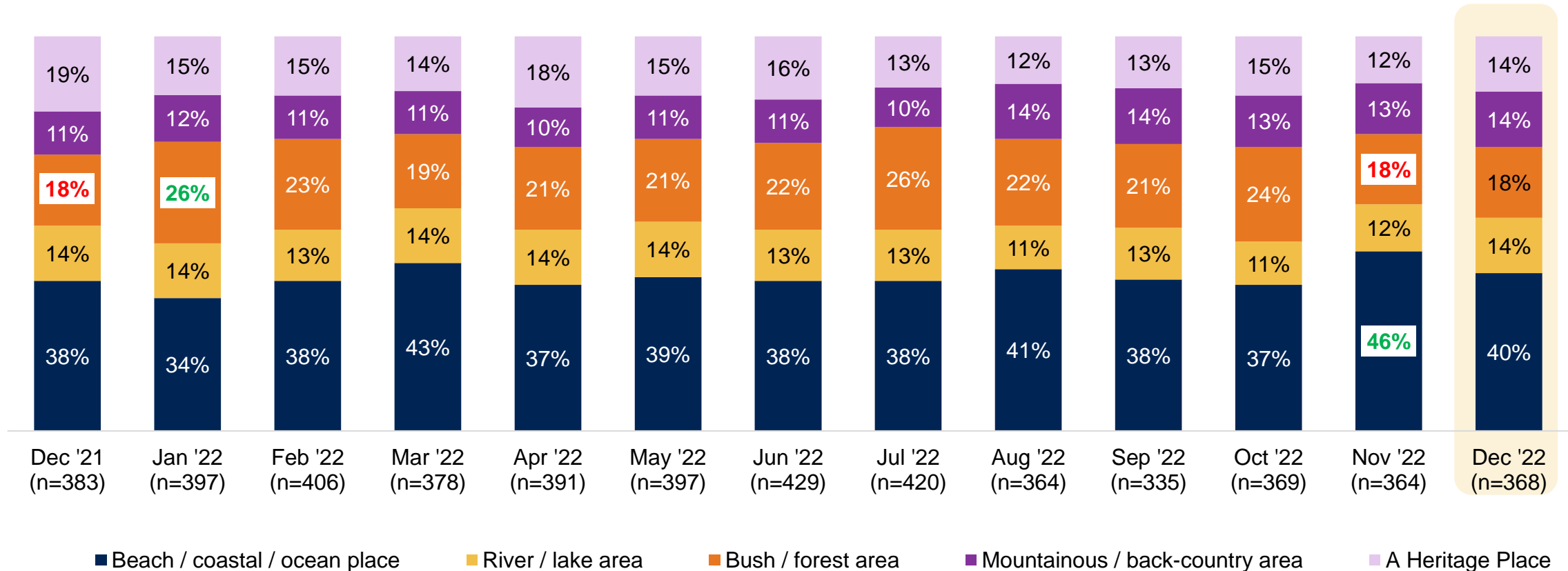
Green / red indicates significantly higher / lower than previous month

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 who cite different types of locations as being especially important to them remains similar to November. Fewer people say this is a beach compared to November.

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



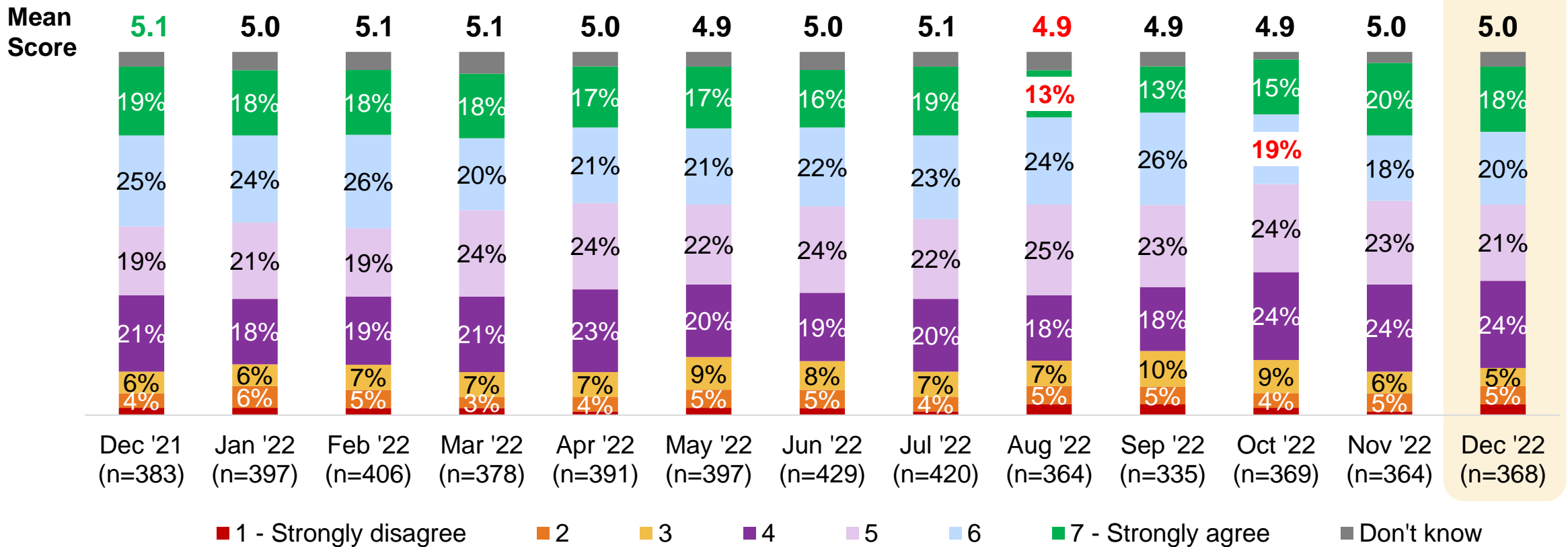
Green / red indicates significantly higher / lower than previous month

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 similar to November but is slightly lower than a year ago.

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



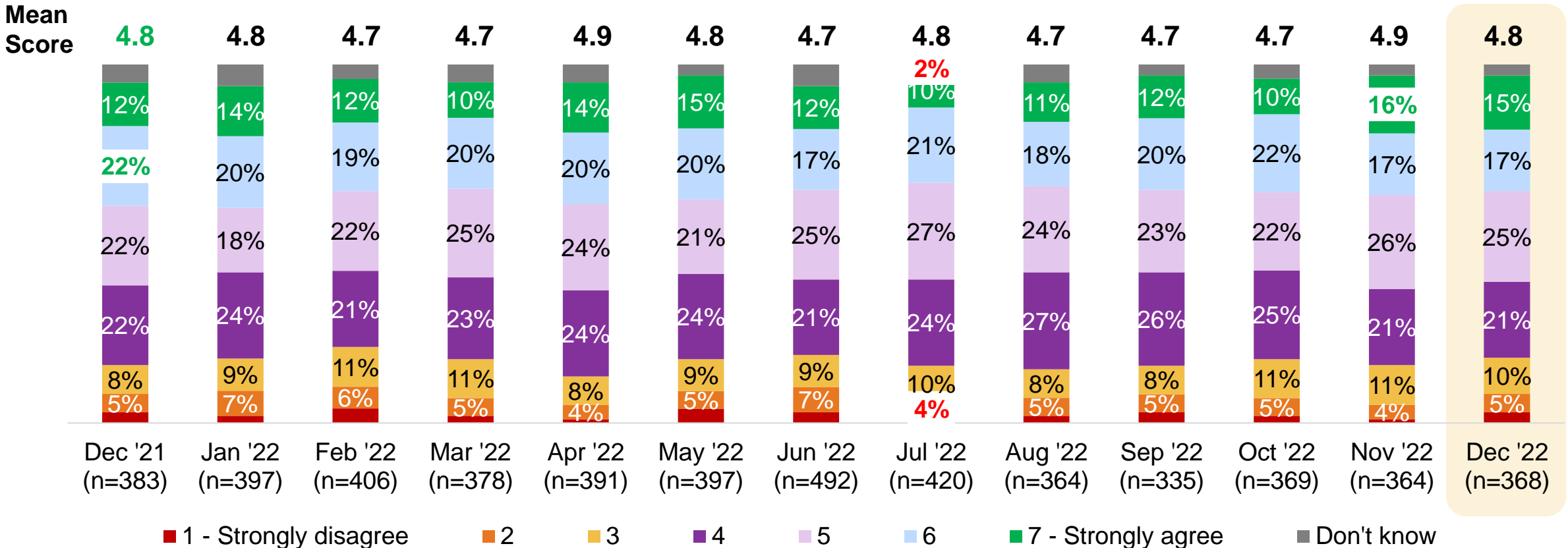
Green / red indicates significantly higher / lower than previous month

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* remains similar to this time last year.

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



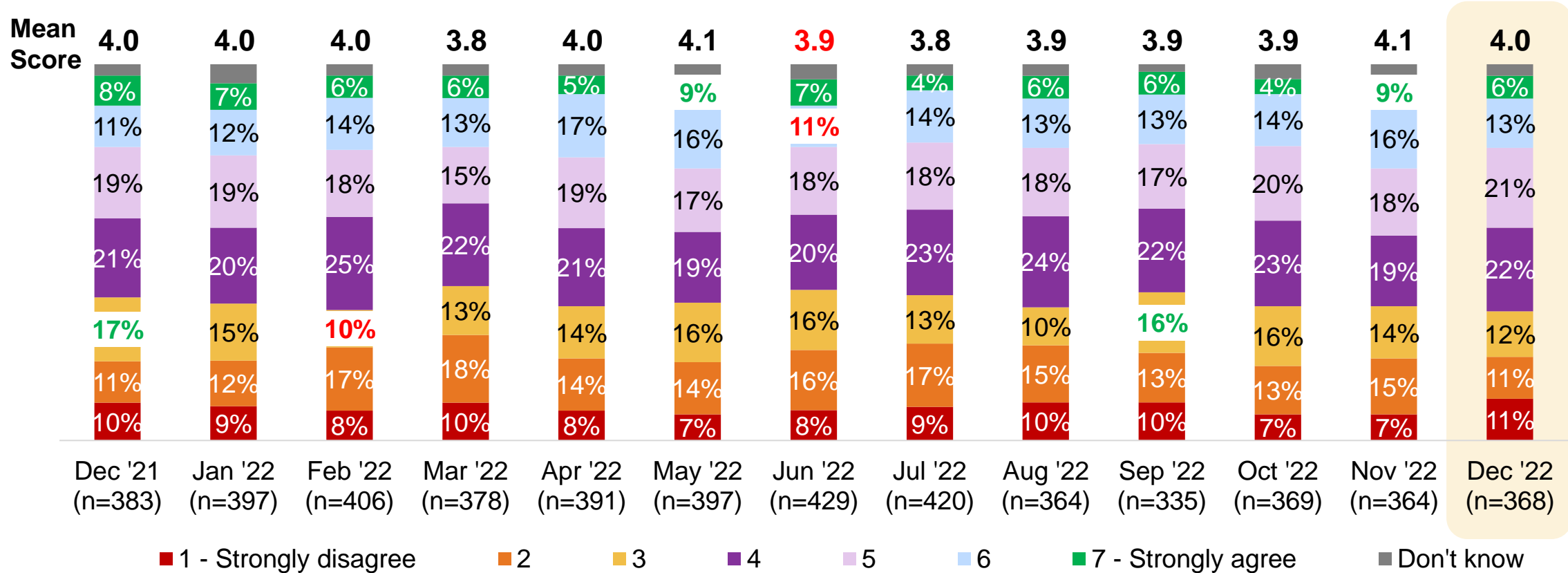
Green / red indicates significantly higher / lower than previous month

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 similar to this time 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

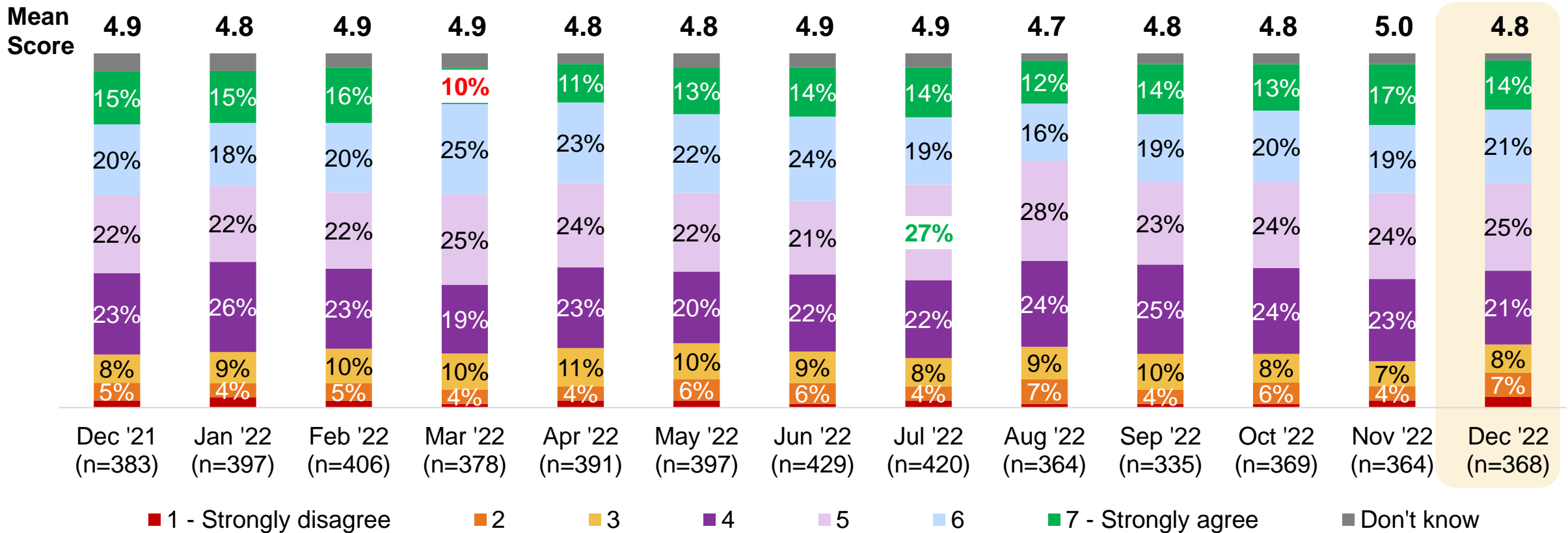
Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place. *Note: Significant differences versus total.

There is a higher number of people who disagree that PNAs suffer from *visitor-created damage*. Despite this, the perception that *visitors to PNAs help ensure areas are protected & improved* remains the majority view.

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”

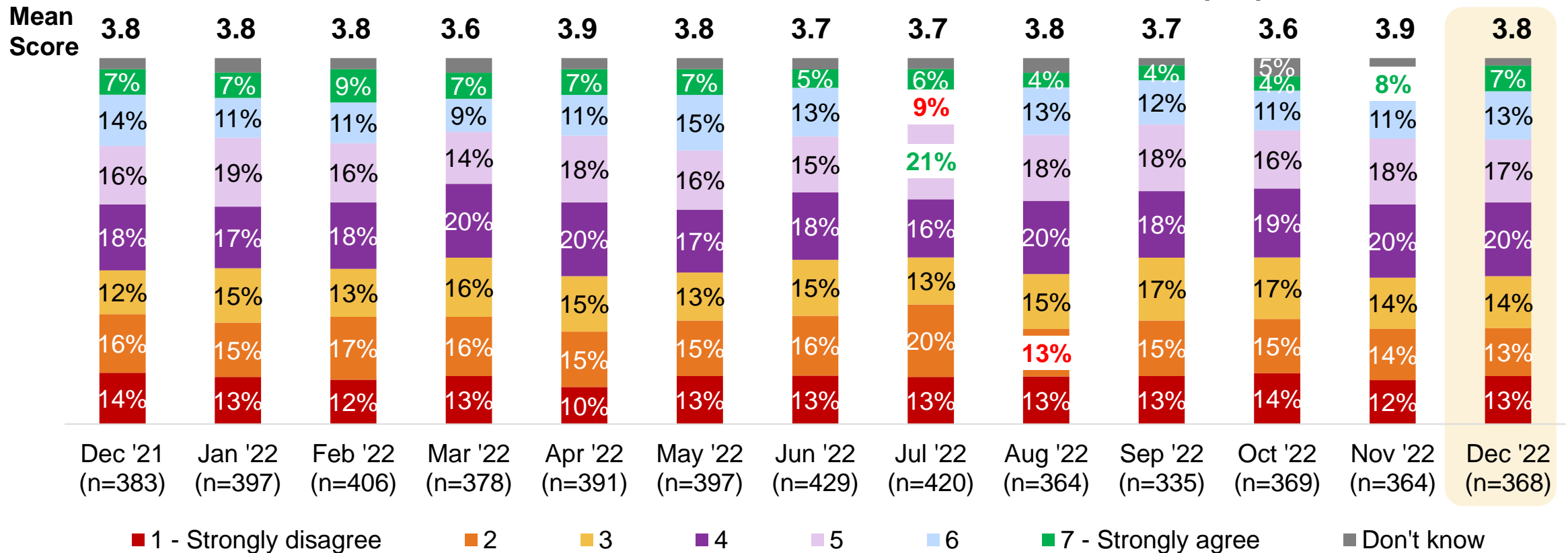


Q42: How much do you agree or disagree with each of the following statements?

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

Perceptions of *visitors affecting the attractiveness of the PNA* vary widely, with the mean score almost equally dividing the sample.

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



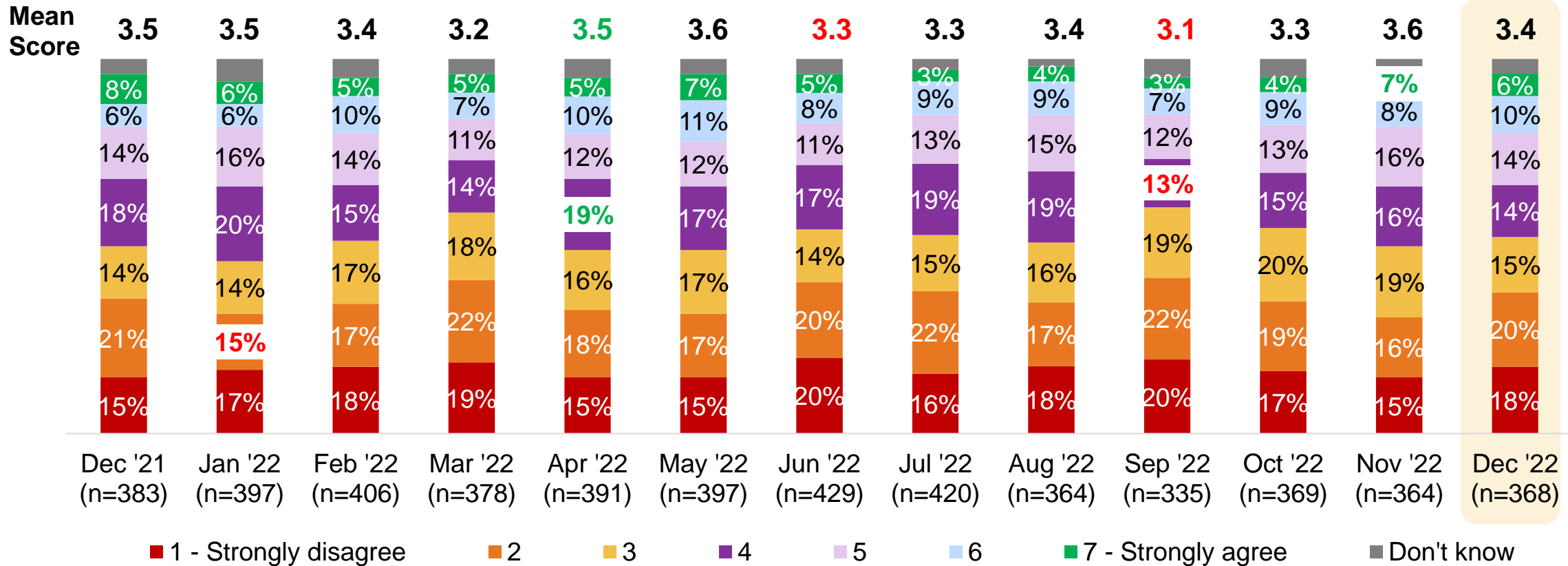
Green / red indicates significantly higher / lower than previous month

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

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

People are still more likely to disagree that *visitors weaken local traditions & cultures*.

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



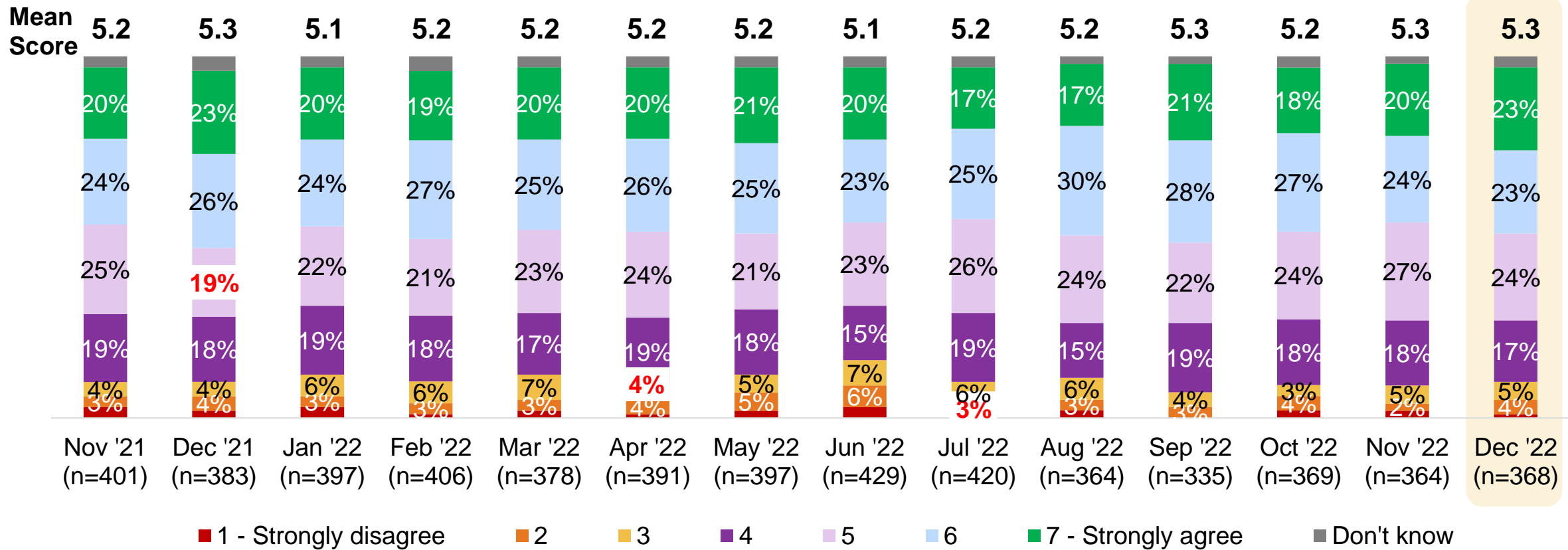
Green / red indicates significantly higher / lower than previous month

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

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

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

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



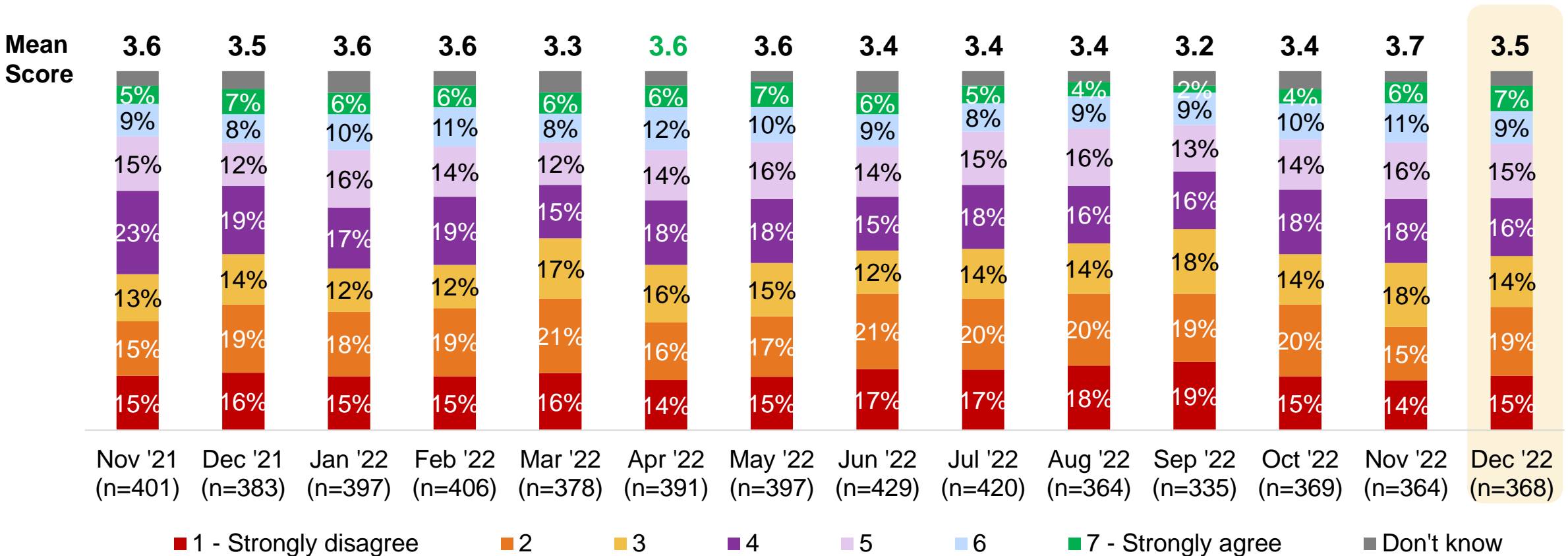
Green / red indicates significantly higher / lower than previous month

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. *Note: Significant differences versus total. **Caution: Low base size (n<100), results indicative only.

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
		5,172	2,009	661	1,108	617	777
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	5.1	4.8	5.1	5.3
	Visitors to this Protected Natural Area help ensure the areas they visit are protected & improved	4.8	4.8	4.9	4.8	4.7	5.0
	Visitors to this Protected Natural Area improve the quality of life of the local communities	4.8	4.8	4.9	4.6	4.8	4.8
	AVERAGE AGREEMENT WITH POSITIVE STATEMENTS (higher numbers are better)	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	4.2	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	3.7	3.8	4.1	3.4	3.9	3.6
	Visitors to this Protected Natural Area add unwanted financial burdens onto the local communities	3.5	3.4	3.8	3.3	3.6	3.5
	Visitors to this Protected Natural Area weaken the local communities' traditions & cultures	3.4	3.4	3.8	3.1	3.5	3.5
	AVERAGE AGREEMENT WITH NEGATIVE STATEMENTS (lower numbers are better)	3.7	3.7	4.0	3.4	3.8	3.6

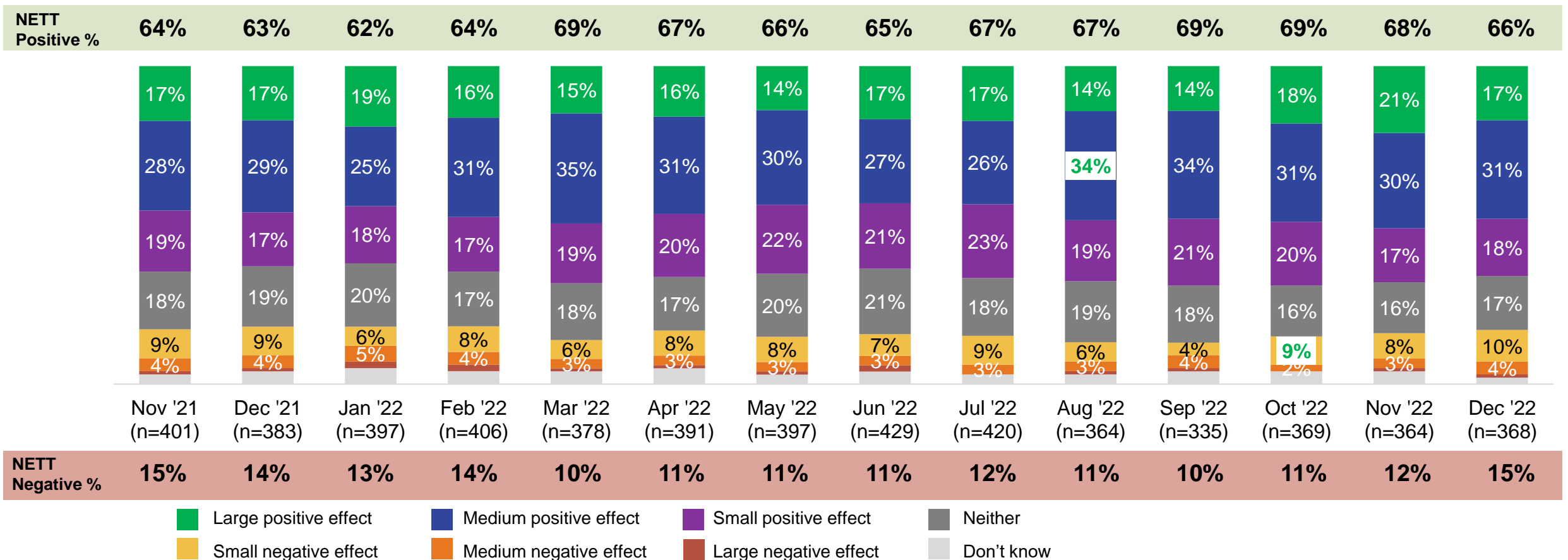
Green / red indicates significantly higher / lower than total

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

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

The majority of residents & visitors to these places believe the effect of visitors is positive.

The effect of visitors on this area



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

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

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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

