

DOC PUBLIC PULSE OF CONSERVATION

February 2023 Topline Report for January 2023 Activity

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24 February, 2023



GAME CHANGERS



KEY FINDINGS – FEBRUARY '23

(COVERING JANUARY '23 ACTIVITY)

- Visits to Protected Heritage Places have significantly increased over the January period. This has occurred alongside an increase in average visits to Protected Heritage Places compared to November and December activity.
- There has been a significant increase in the number of people doing *day walks* and *hikes* at Protected Natural Areas in the past month compared to the December period. This is expected for the holiday period.
- Satisfaction with the overall experience at Protected Natural Areas has significantly increased this month with more visitors rating their experience as 'exceptionally good'. This aligns with a large increase in Protected Natural Areas NPS which is now at its highest level since December 2021.
- When it comes to personal experience at Protected Natural Areas, more people said they *would be happy to visit again, their visit was worth the time/effort/expense and their visit provided all the benefits they expected.*
- While Protected Natural Area visitors are satisfied, locals/regular visitors to Protected Natural Areas are showing growing negative sentiment.
- Protected Heritage Places' NPS remains stable compared to last month but remains much lower than for the 12 months preceding the substantial decline that began in September – the large and ongoing nature of this drop in NPS deserves attention.



SUMMARY


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

BACKGROUND & METHODOLOGY



Sample size

1,000




Fieldwork dates
February 7-15, 2022

Interview duration
6 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

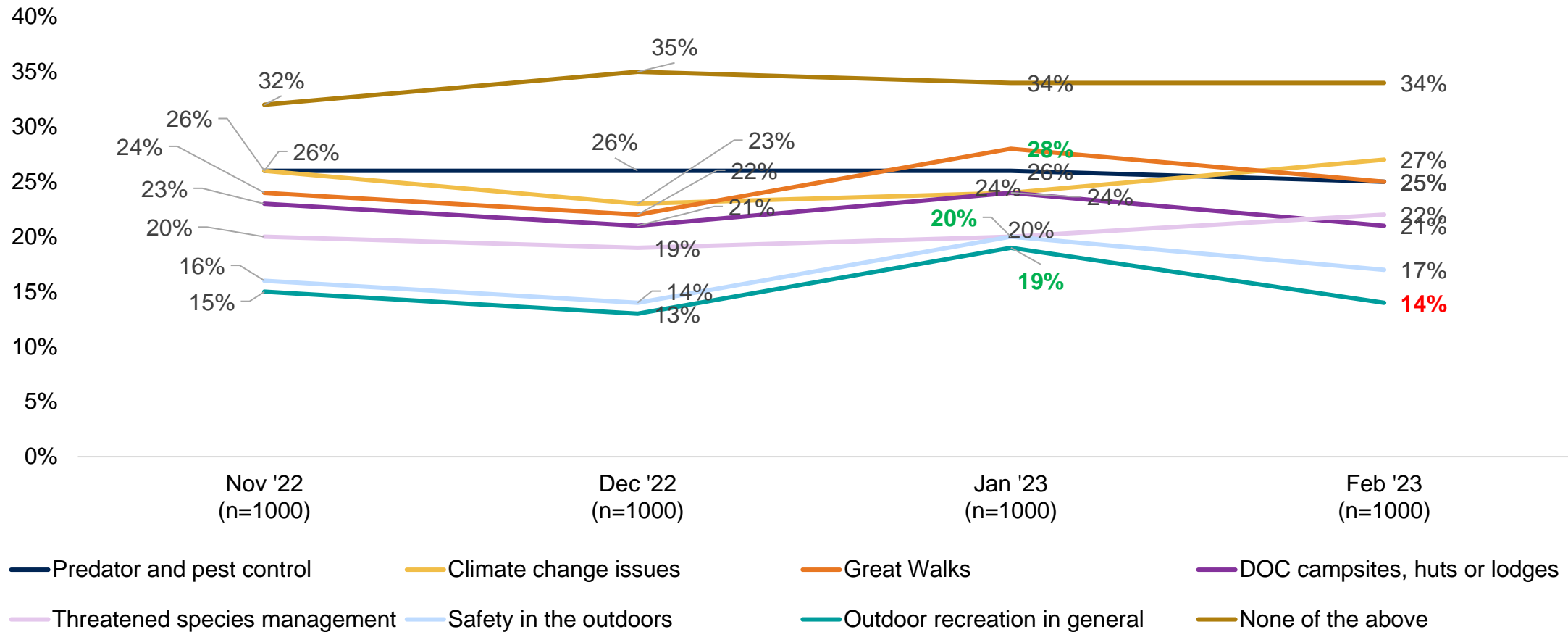
Aug 21	2–6 August, 2021
Sep 21	3–9 September, 2021
Oct 21	1–7 October, 2021
Nov 21	5–12 November, 2021
Dec 21	3–9 December, 2021
Jan 22	6–15 January, 2022
Feb 22	5–15 February, 2022
Mar 22	3–10 March, 2022
Apr 22	1–11 April, 2022
May 22	5–16 May, 2022
Jun 22	3–11 June, 2022
Jul 22	4–13 July, 2022
Aug 22	15-24 August, 2022
Sep 22	7-17 September, 2022
Oct 22	5-17 October, 2022
Nov 22	7-21 November, 2022
Dec 22	5-19 December, 2022
Jan 23	9-17 January, 2023

DOC MEDIA PROFILE



This month, more people recalling DOC content regarding *climate change* and *threatened species management*. Significantly less people recalled DOC content related to *outdoor recreation in general*.

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

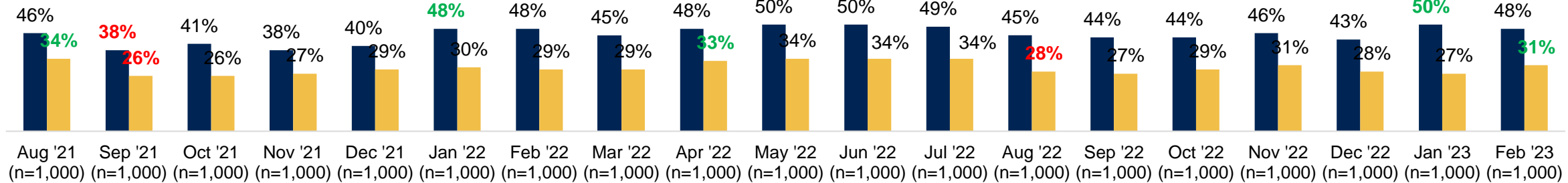


Q50: Which, if any, of the following aspects of the Department of Conservation have you seen, read, or heard about in the past 4 weeks? *Note: Responses less than 15% are excluded

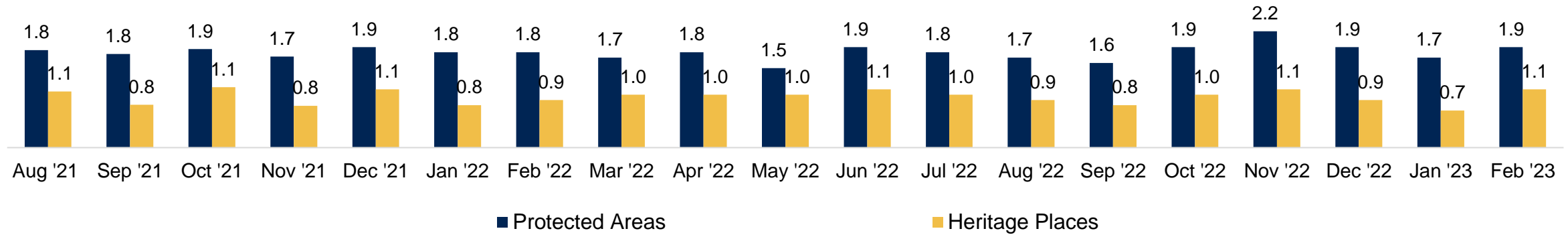
VISITATION FREQUENCY

Visitation to Protected Heritage Places has significantly increased this month, alongside a large increase in average visits compared to the December and January months.

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*

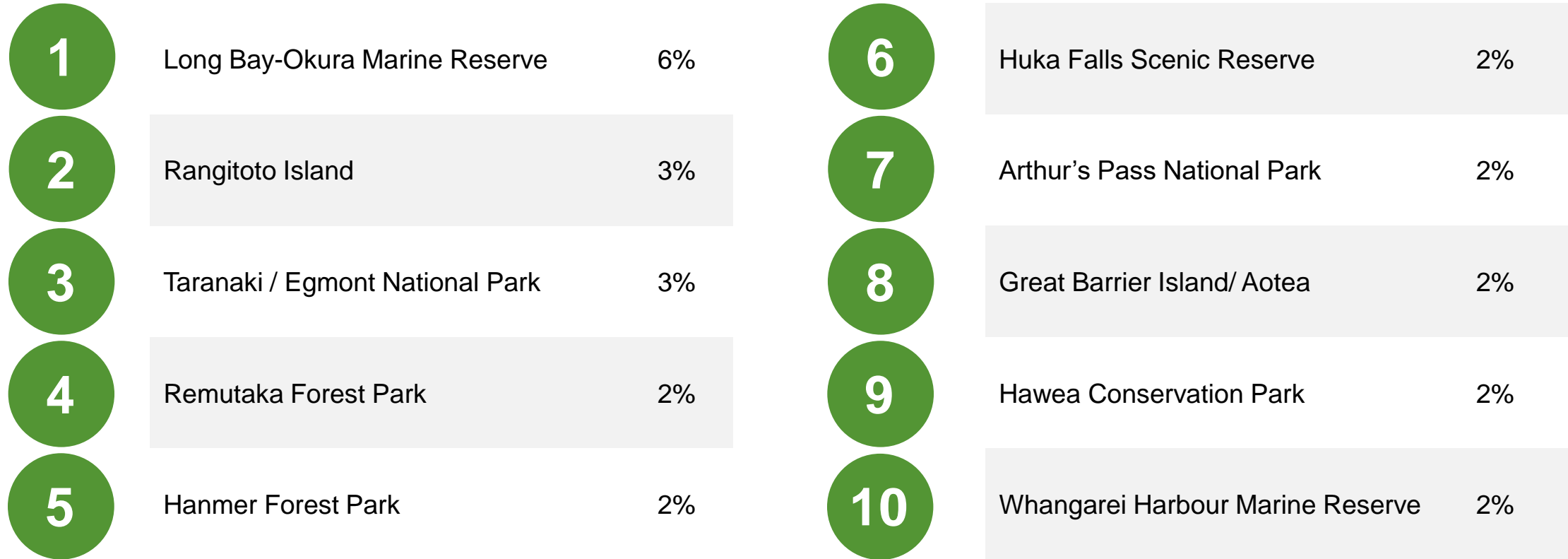


Green / red indicates significantly higher / lower than previous month

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–FEB 2023.

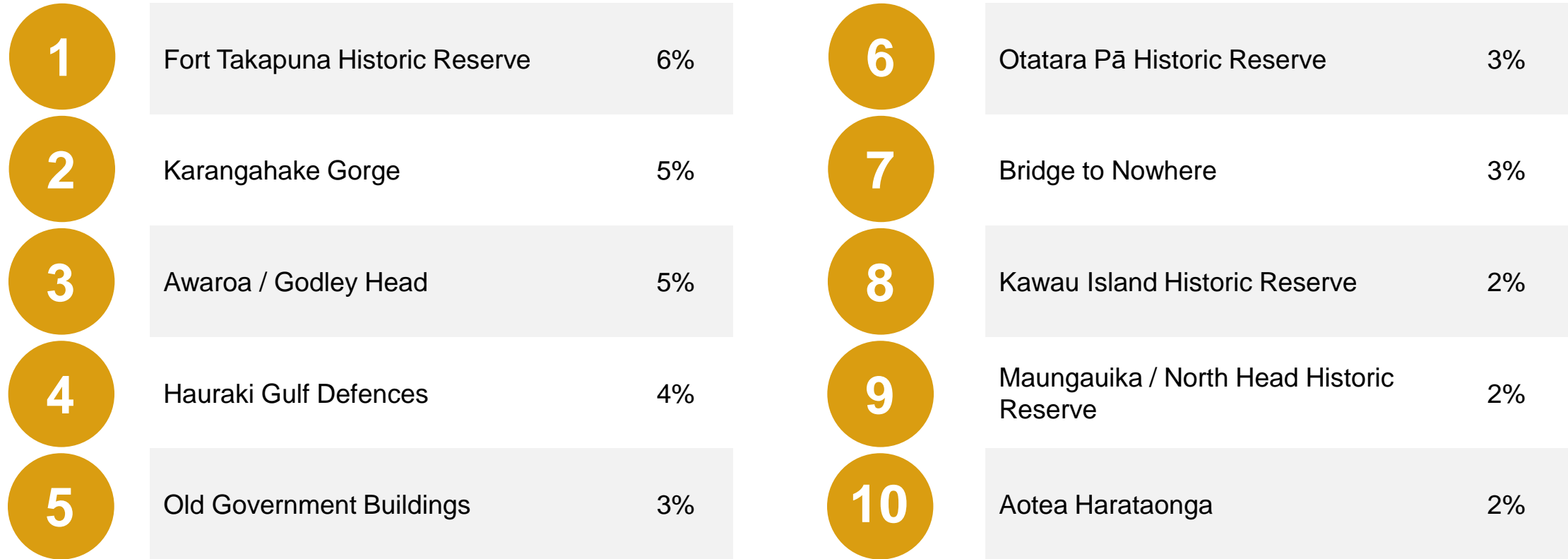


Green / red indicates Increase / decrease in rank position compared to previous month

Q8: Which of these Protected Natural Areas did you visit most recently? Select the location that is strongest in your memory.

Base: Those who have visited a Protected Natural Area (n=9,439)

TOP-10 PROTECTED HERITAGE PLACES VISITED: JUN 2021–FEB 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=6,229)

The number of people saying they have gone on a *day walk / hike* as a Protected Natural Area activity has significantly increased following January which had a lower rate than usual. This may reflect the improvement in upper North Island weather from late January.

Top activities when visiting Protected Natural Areas*

	Total	Jun'21	Jul'21	Aug'21	Sep'21	Oct'21	Nov'21	Dec'21	Jan'22	Feb'22	Mar'22	Apr'22	May'22	Jun'22	Jul'22	Aug'22	Sep'22	Oct'22	Nov'22	Dec'22	Jan'23	Feb'23
Base (n=)	8,957	397	422	464	380	407	379	401	478	477	450	484	504	498	492	451	436	442	465	433	497	482
Short walk (<3 hours)	39%	37%	38%	36%	38%	35%	33%	33%	41%	33%	41%	38%	38%	38%	38%	44%	42%	40%	41%	41%	44%	41%
Sightseeing	30%	29%	28%	29%	32%	29%	29%	24%	31%	27%	30%	30%	32%	31%	30%	35%	34%	28%	31%	27%	32%	34%
Photography	25%	25%	29%	26%	26%	21%	22%	21%	24%	24%	27%	24%	25%	24%	25%	26%	26%	26%	27%	26%	28%	27%
Bird / wildlife watching	25%	25%	27%	28%	24%	26%	26%	24%	22%	20%	24%	25%	24%	24%	25%	26%	24%	24%	24%	27%	25%	26%
Connecting with nature	23%	22%	21%	25%	22%	17%	25%	21%	21%	21%	24%	24%	25%	25%	26%	20%	22%	25%	22%	21%	25%	25%
Day walk / hike (>3 hours but not overnight)	23%	25%	25%	23%	26%	21%	25%	26%	22%	21%	20%	24%	21%	26%	21%	23%	23%	23%	21%	25%	19%	25%
Picnic, barbeque, etc	20%	20%	21%	17%	19%	17%	20%	19%	22%	21%	22%	22%	18%	19%	20%	20%	21%	21%	20%	22%	23%	20%
Swimming in a lake/river/sea	9%	9%	6%	7%	5%	4%	5%	11%	18%	14%	16%	11%	10%	6%	7%	5%	6%	7%	9%	8%	16%	17%
Connecting with history	13%	10%	13%	14%	14%	11%	17%	10%	12%	11%	16%	14%	14%	13%	13%	10%	13%	17%	15%	15%	13%	16%
Camping	12%	15%	14%	12%	14%	14%	14%	12%	16%	14%	13%	12%	11%	11%	11%	11%	8%	10%	11%	11%	12%	13%
Connecting with culture	10%	8%	9%	11%	11%	8%	11%	12%	10%	11%	10%	10%	12%	7%	11%	8%	8%	13%	11%	10%	10%	11%

Green / red indicates significantly higher / lower than previous month

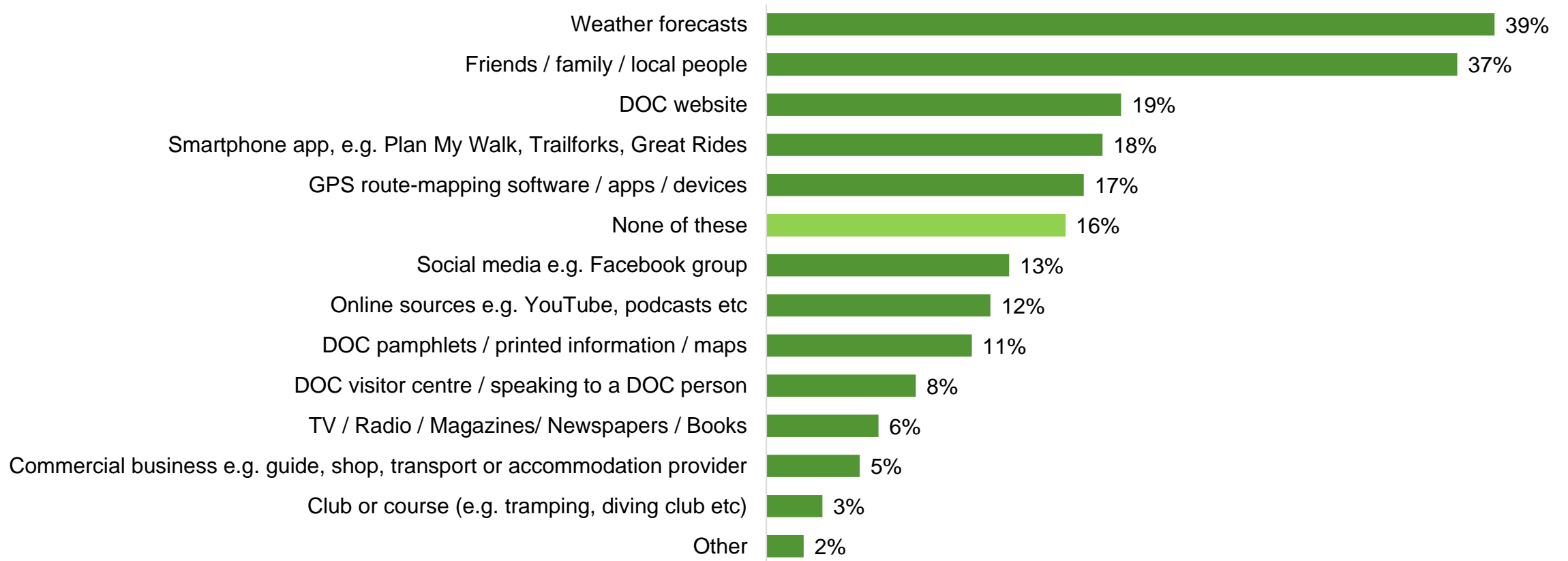
Q12: Thinking about your most recent visit to <LOCATION SELECTED IN Q8>, which of the following activities did you engage in?

Base: Those who visited a Protected Natural Area in the last month. *Note: Only activities 10% and above for current month displayed. **Caution: Low base size (n<100), results indicative only.

VISIT SATISFACTION

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

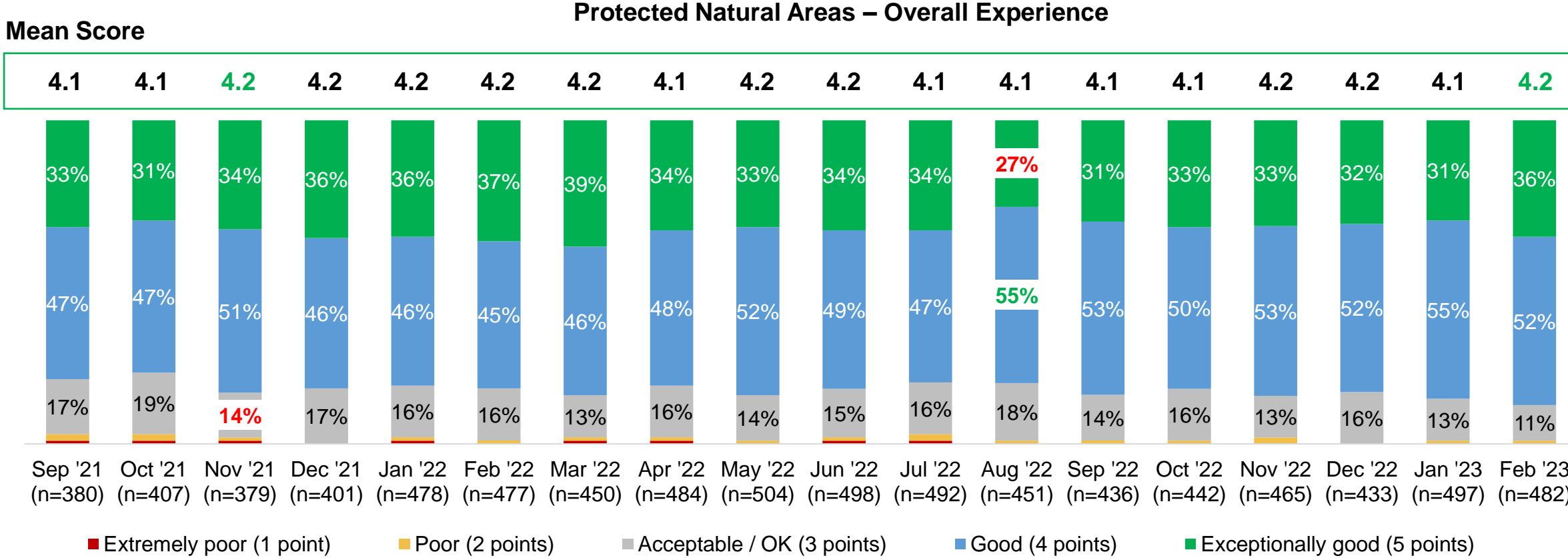
Sources of Information used for Planning



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

Base: Those who visited a Protected Natural Area (n=1,877)

Satisfaction with the overall experience at Protected Natural Areas has significantly increased this month, as it appears to do each February.



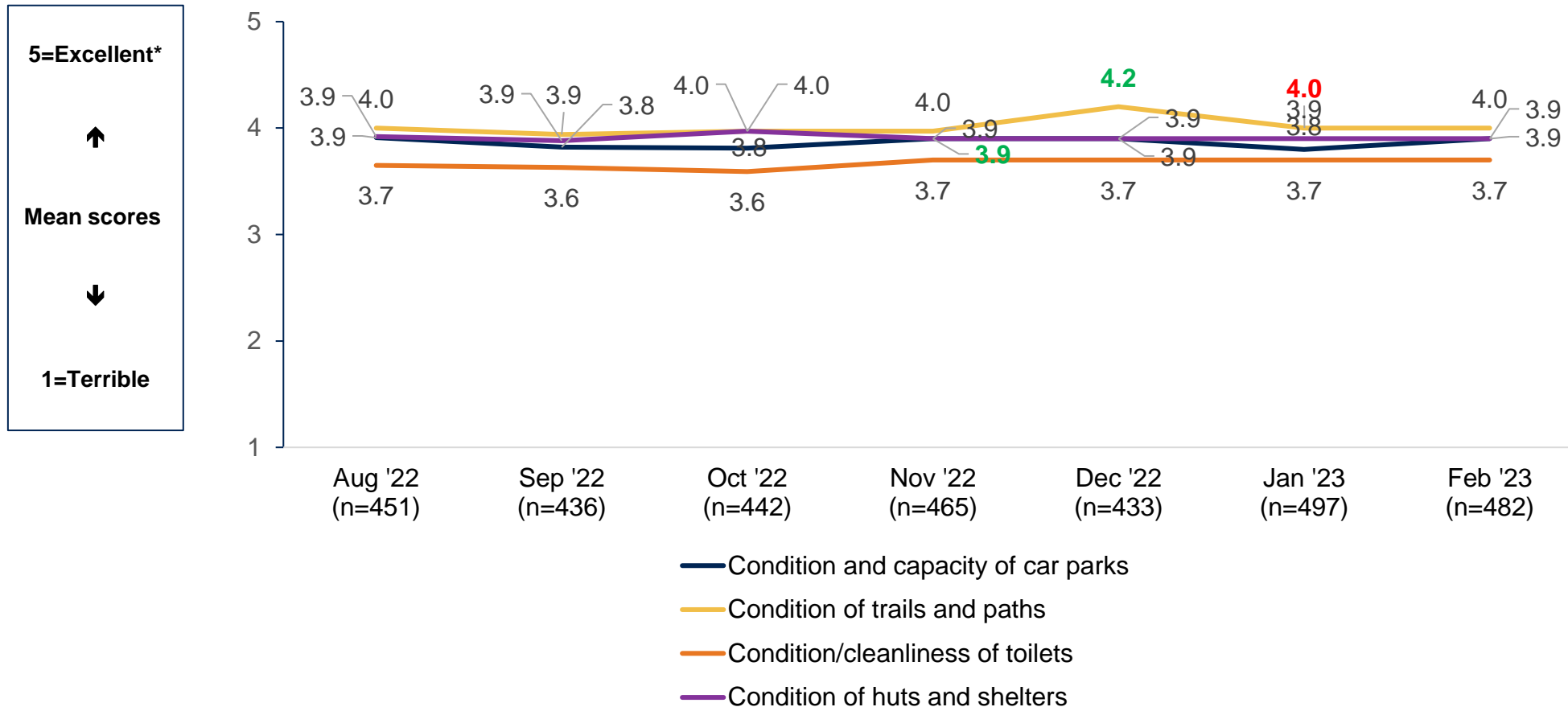
Q15: Overall, how would you rate your experience at <LOCATION SELECTED IN Q8>?
 Base: Those who visited a Protected Natural Area in the last month



Green / red indicates significantly higher / lower than previous month

Visitors' satisfaction with the *condition of trails and paths* unchanged after a significant decrease last month. This may reflect trail damage caused by a wet North Island Summer. Satisfaction with other facilities' conditions remains stable.

Satisfaction with Protected Natural Areas: Facilities

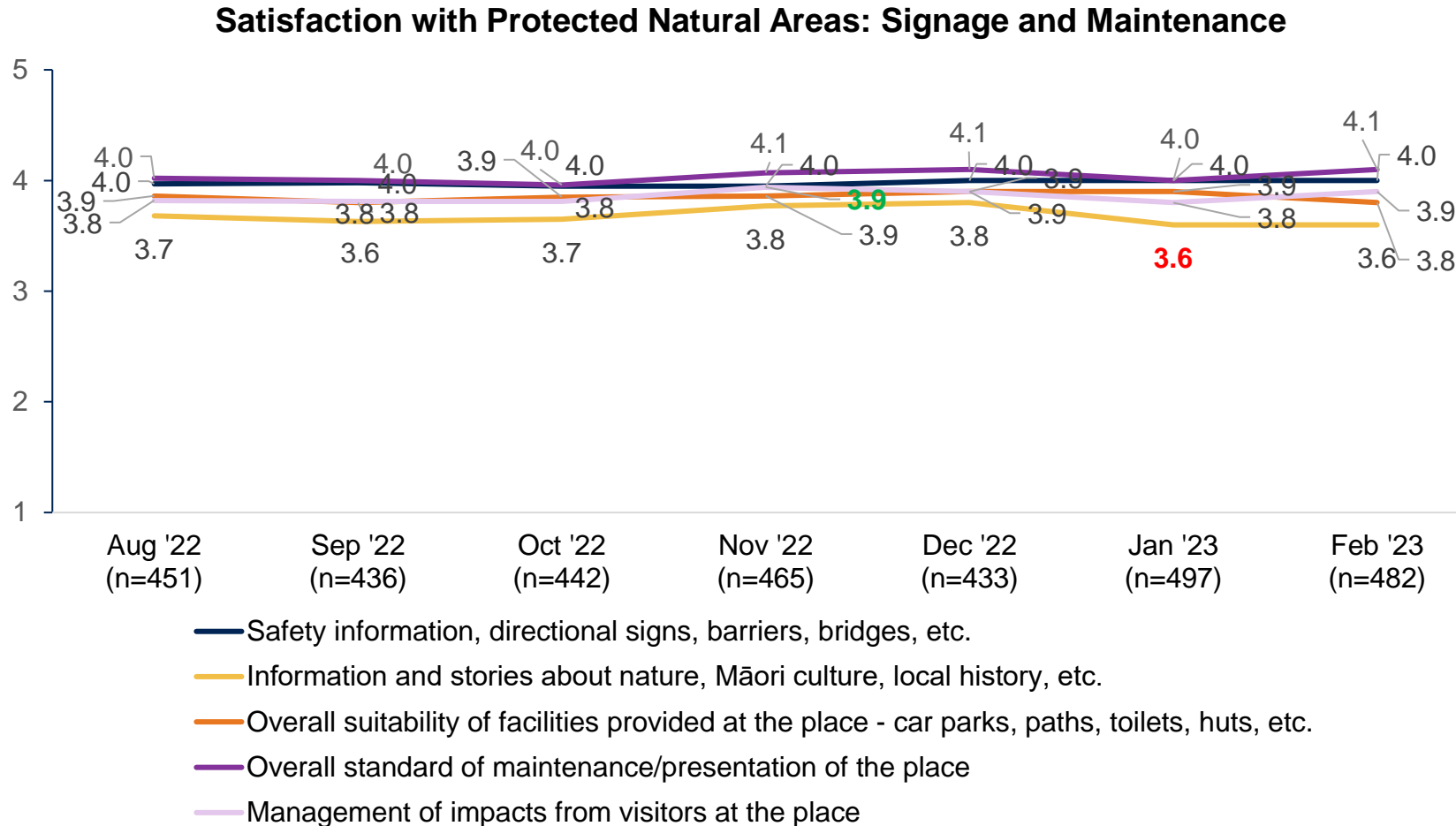
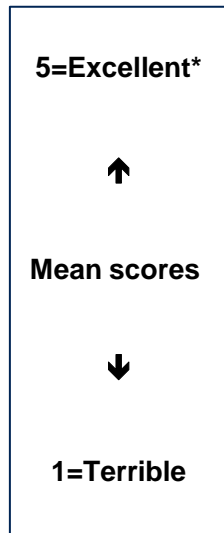


Green / red indicates significantly higher / lower than previous month

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.

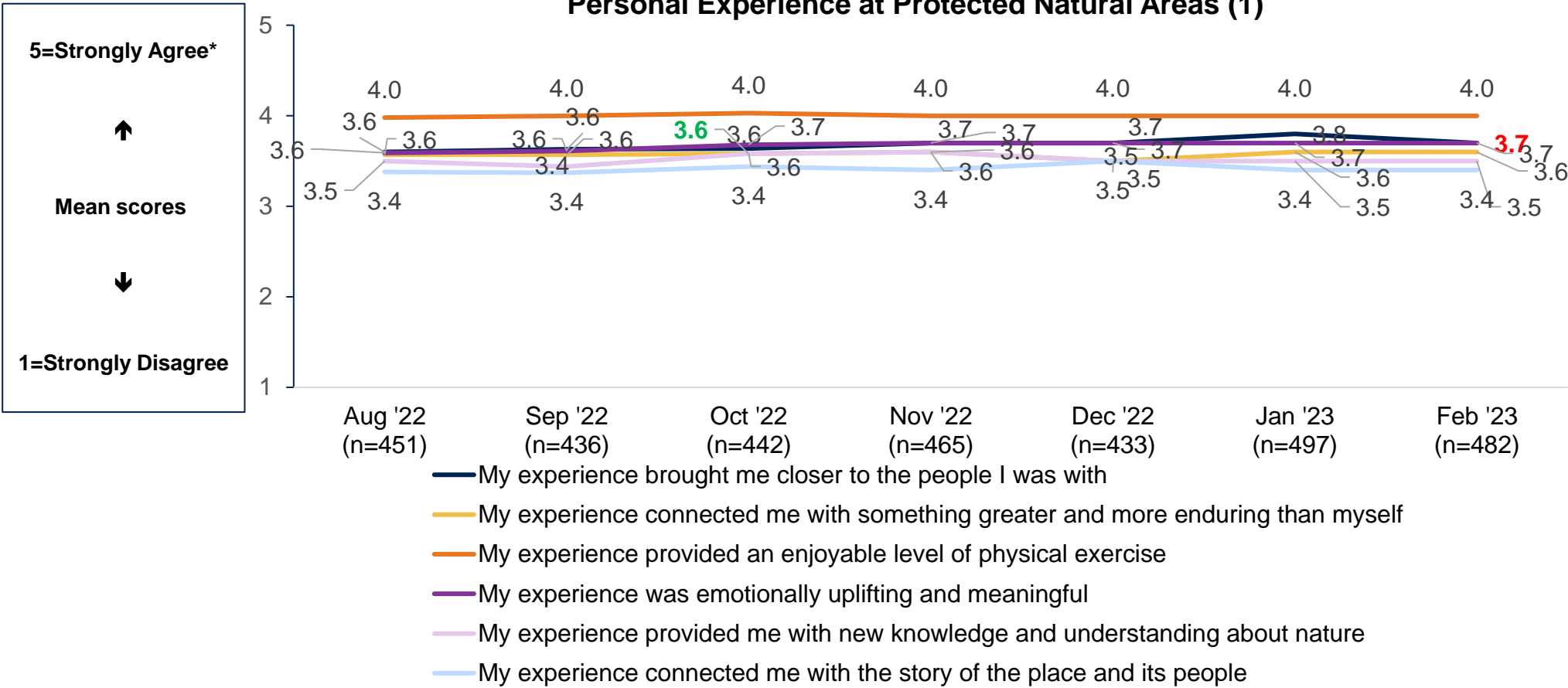
Visitor satisfaction with *signage and maintenance* remains fairly high this month.



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.

This month, significantly fewer people said that their experience at Protected Natural Areas brought them closer to the people they were with.



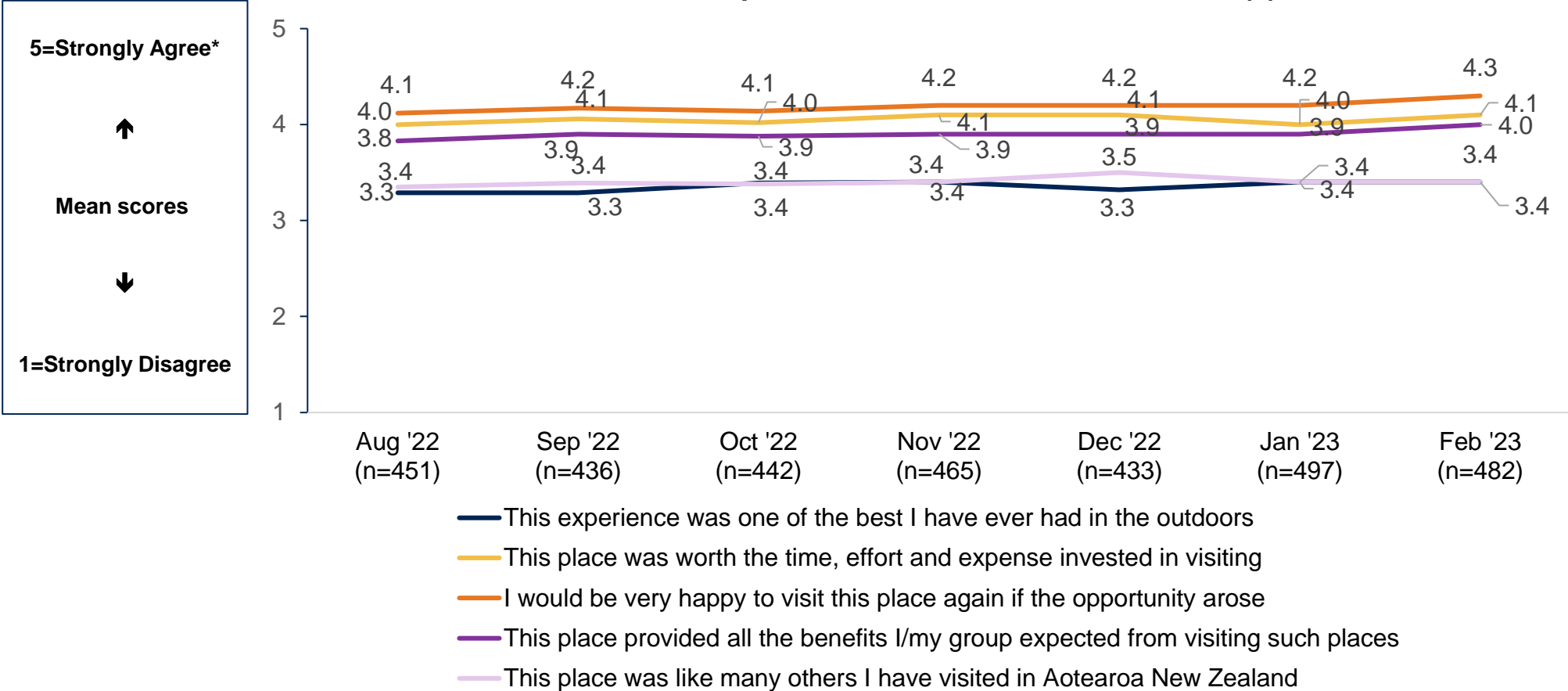
Q14b: Still thinking about your most recent visit to <LOCATION SELECTED IN Q8>, how much do you agree or disagree with each of the statements below?

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

Green / red indicates significantly higher / lower than previous month

This month, more people said they *would be happy to visit again, their visit was worth the time/effort/expense and their visit provided all the benefits they expected.*

Personal Experience at Protected Natural Areas (2)

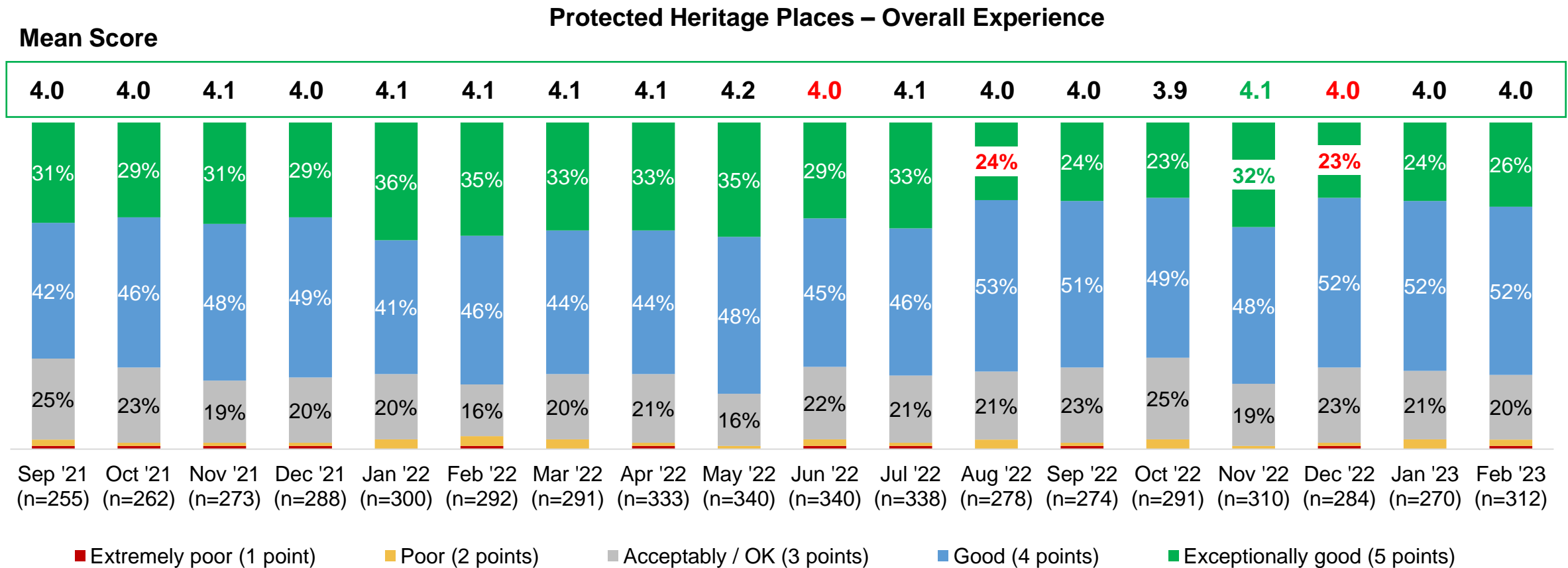


Q14b: Still thinking about your most recent visit to <LOCATION SELECTED IN Q8>, how much do you agree or disagree with each of the statements below?

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



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



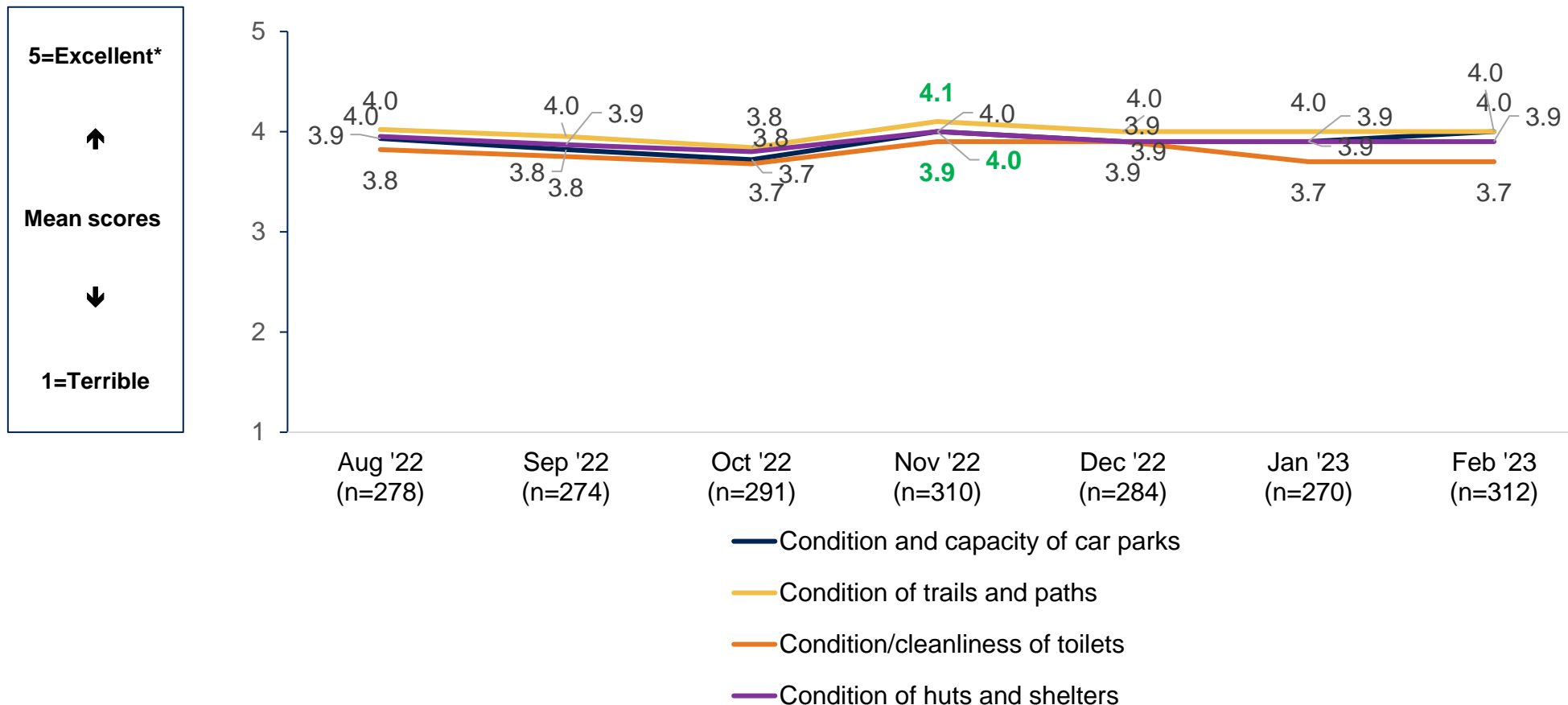
Green / red indicates significantly higher / lower than previous month

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

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

Satisfaction with Protected Heritage Places: Facilities

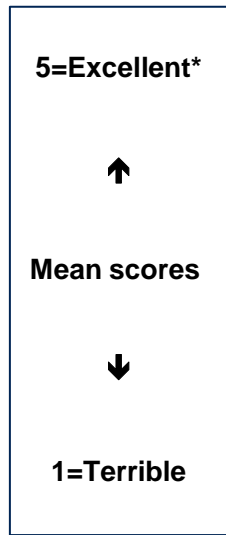


Green / red indicates significantly higher / lower than previous month

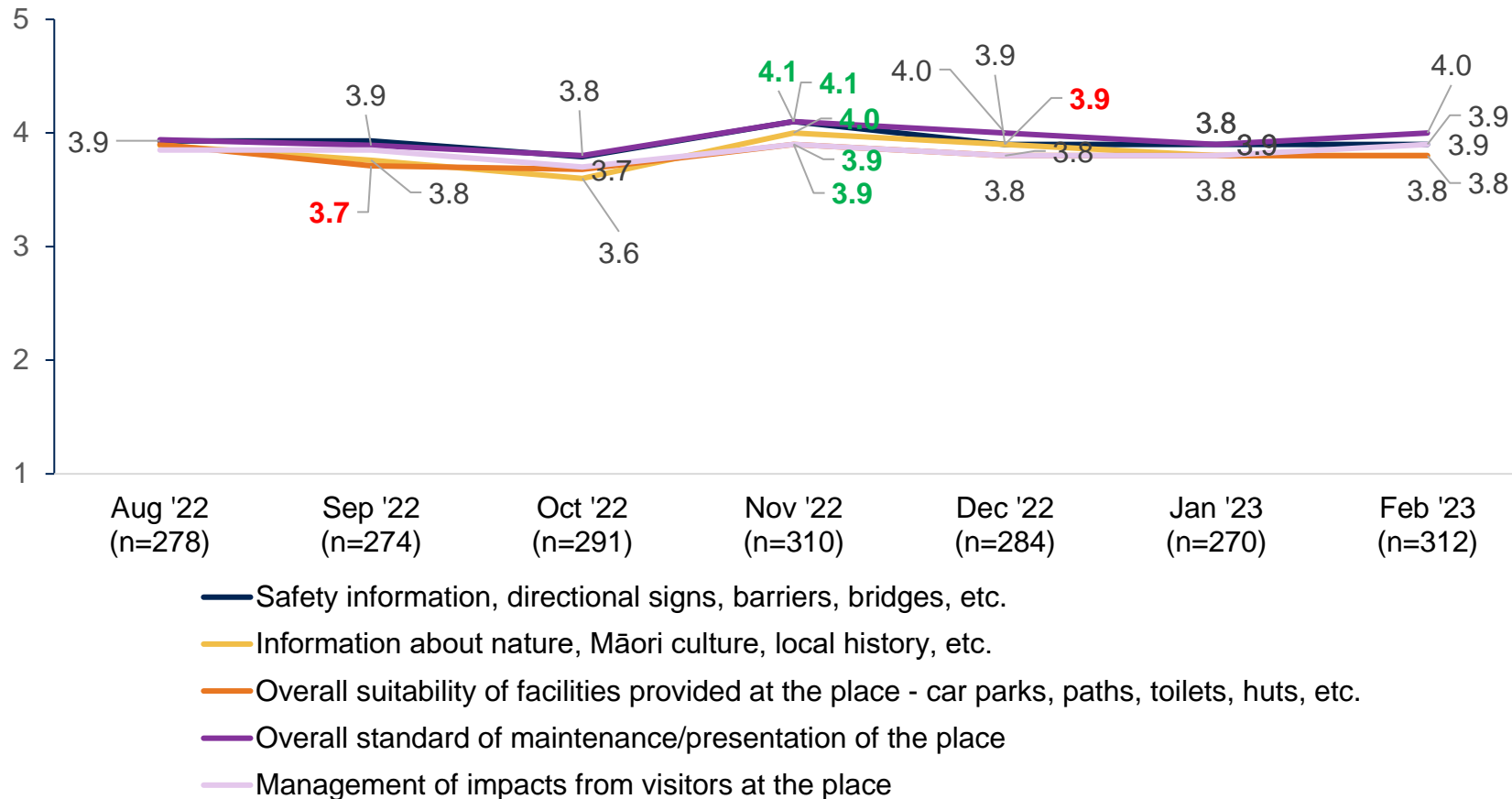
Q26a: Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how would you rate the following aspects listed below?

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

Satisfaction with *overall standard of maintenance* remains stable compared to last month.



Satisfaction with Protected Heritage Places: Signage and Maintenance



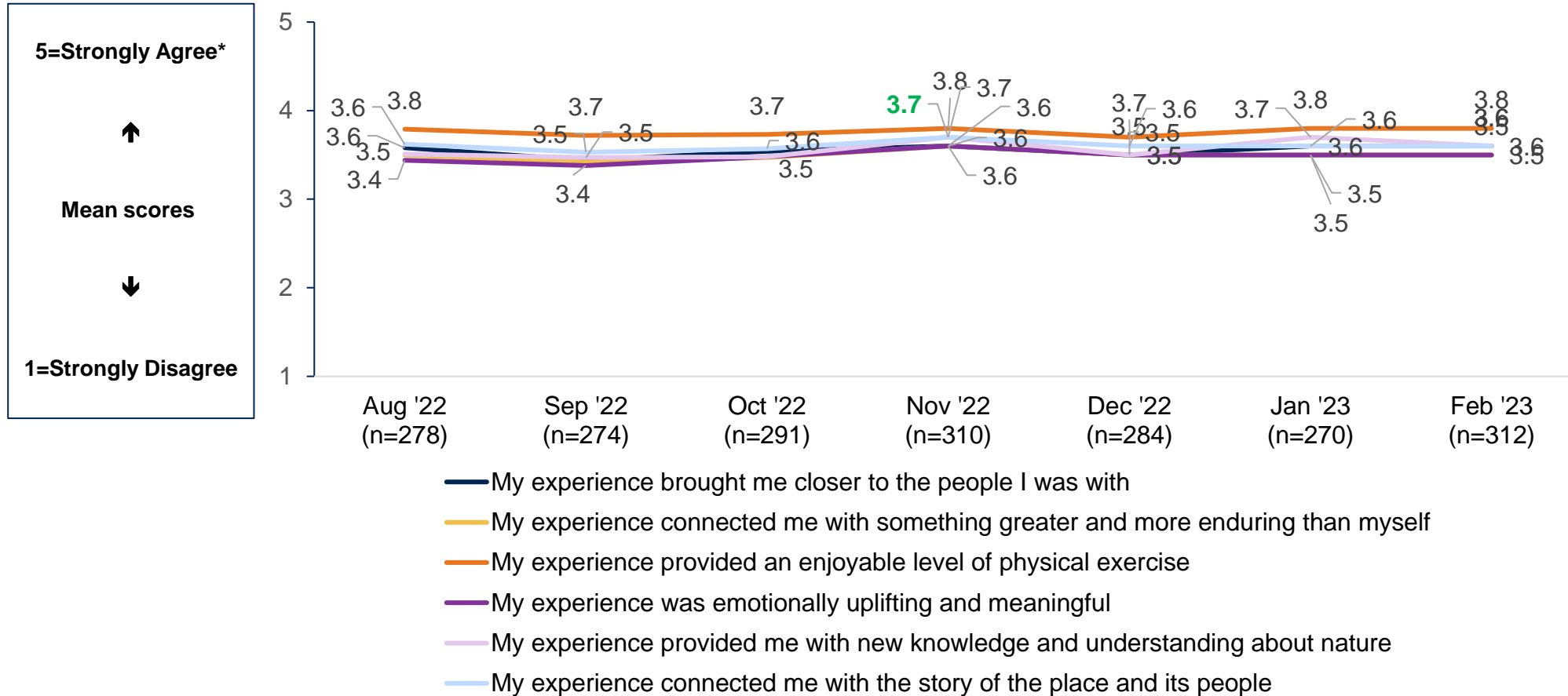
Green / red indicates significantly higher / lower than previous month

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 remain stable.

Personal Experience at Protected Heritage Places (1)

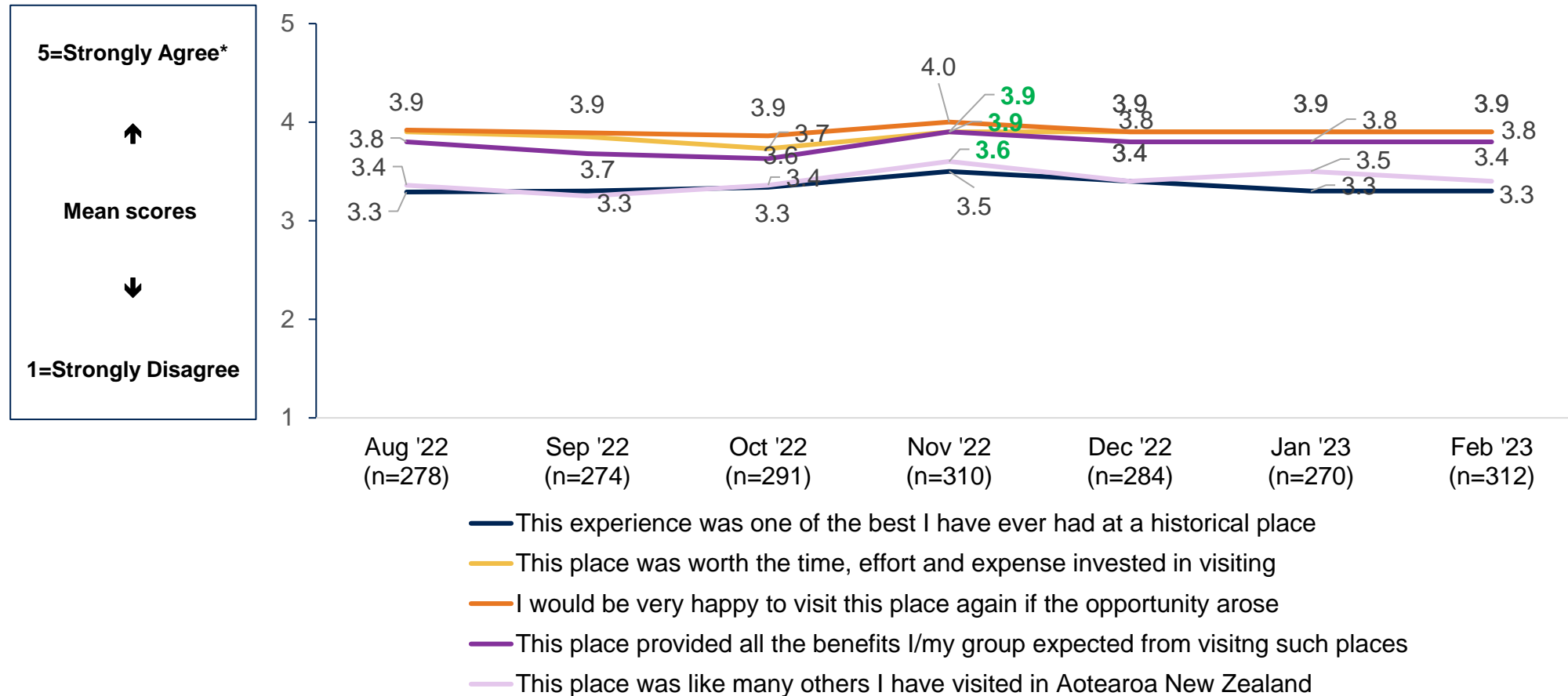


Q26b: Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how much do you agree or disagree with each of the statements below?

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

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

Personal Experience at Protected Heritage Places (2)



Green / red indicates significantly higher / lower than previous month

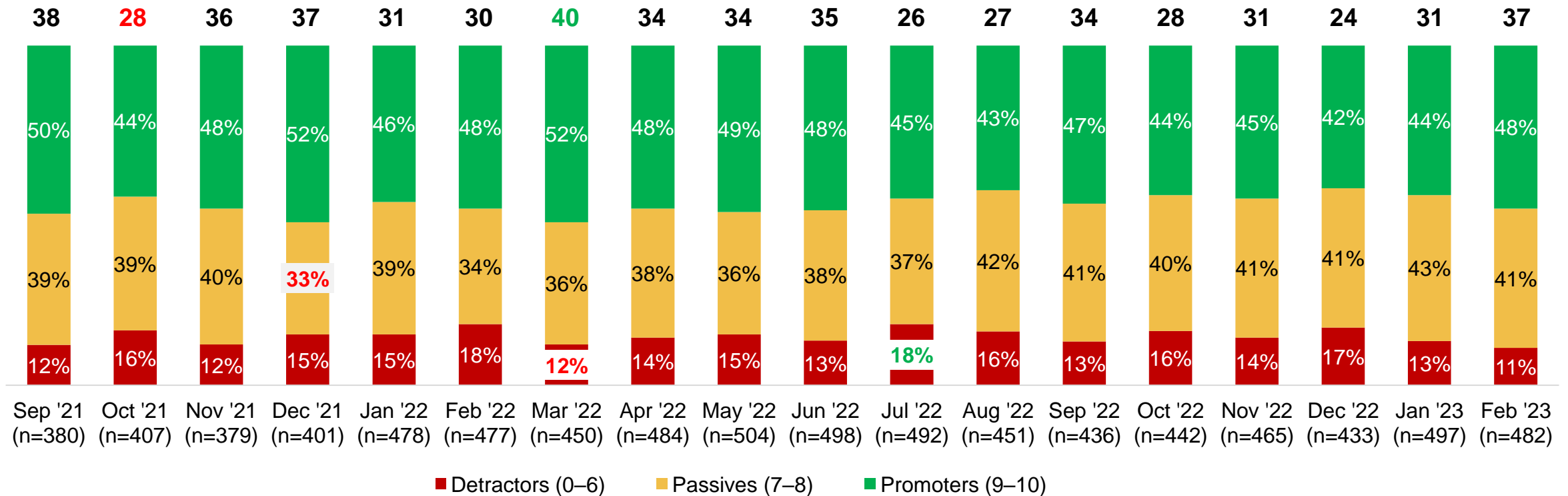
Q26b: Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how much do you agree or disagree with each of the statements below?

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

NPS

Protected Natural Areas' NPS has continued to increase as the number of promoters has risen. This is the highest level NPS has been since March 2022.

Protected Natural Areas – NPS



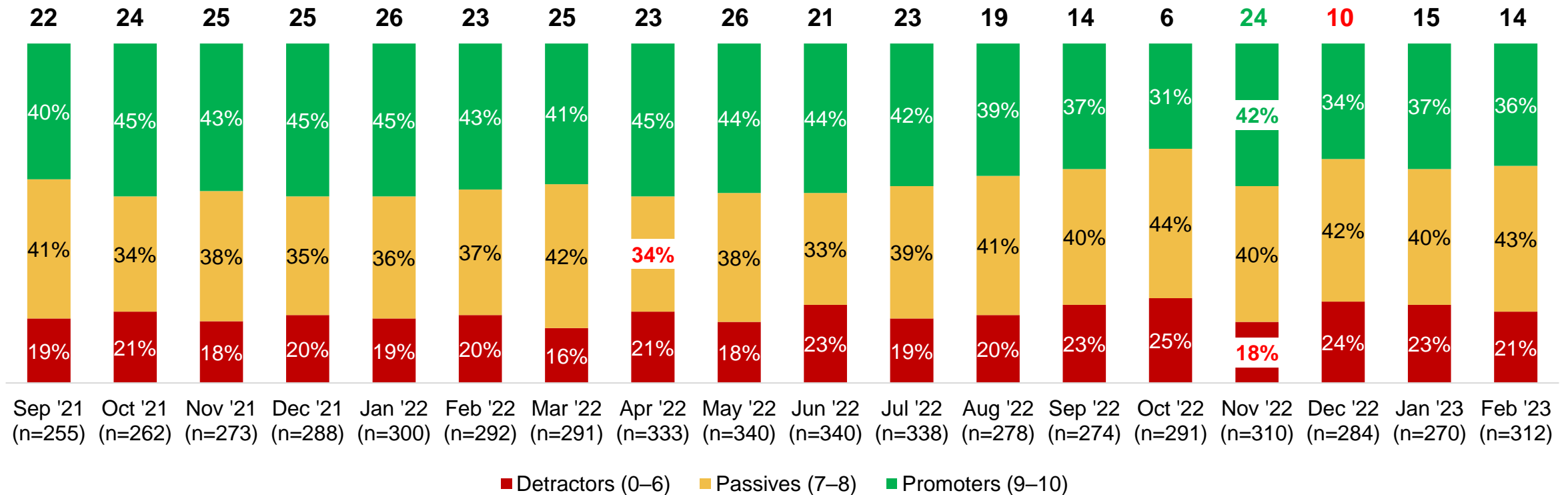
Q16: How LIKELY is it you would RECOMMEND <LOCATION SELECTED IN Q8> to your family or friends?

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

Green / red indicates significantly higher / lower than previous month

Protected Heritage Places' NPS remains stable compared to last month but 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

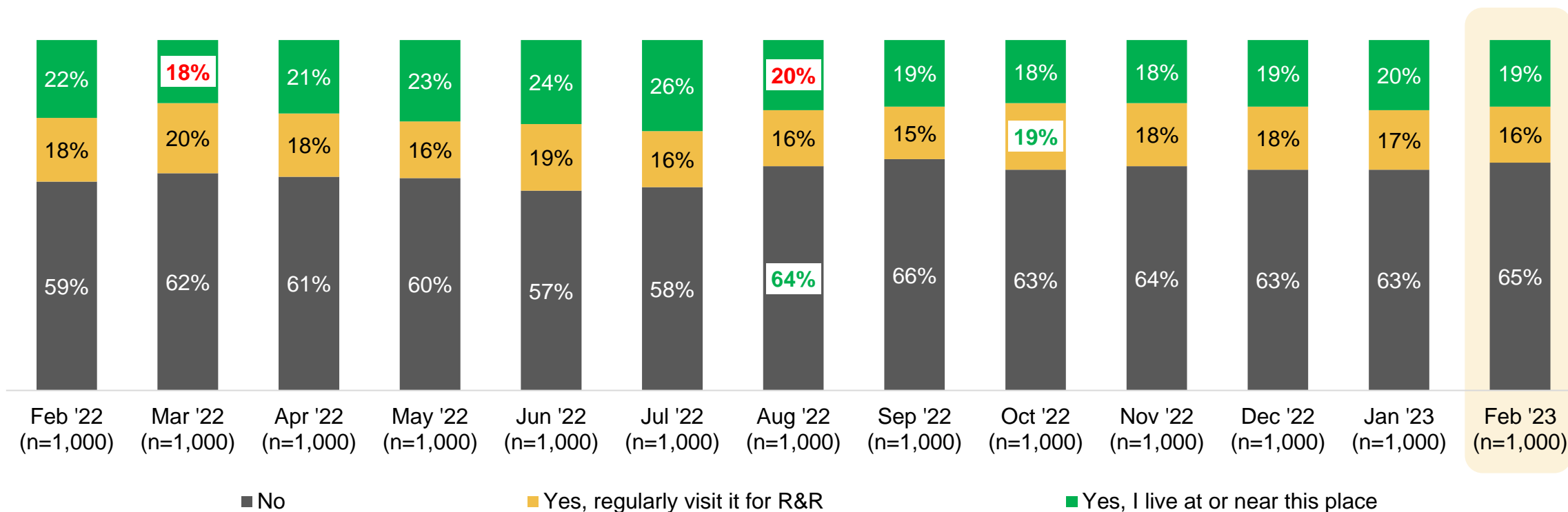
Q28: How LIKELY is it you would RECOMMEND <LOCATION SELECTED IN Q20> to your family or friends?

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?



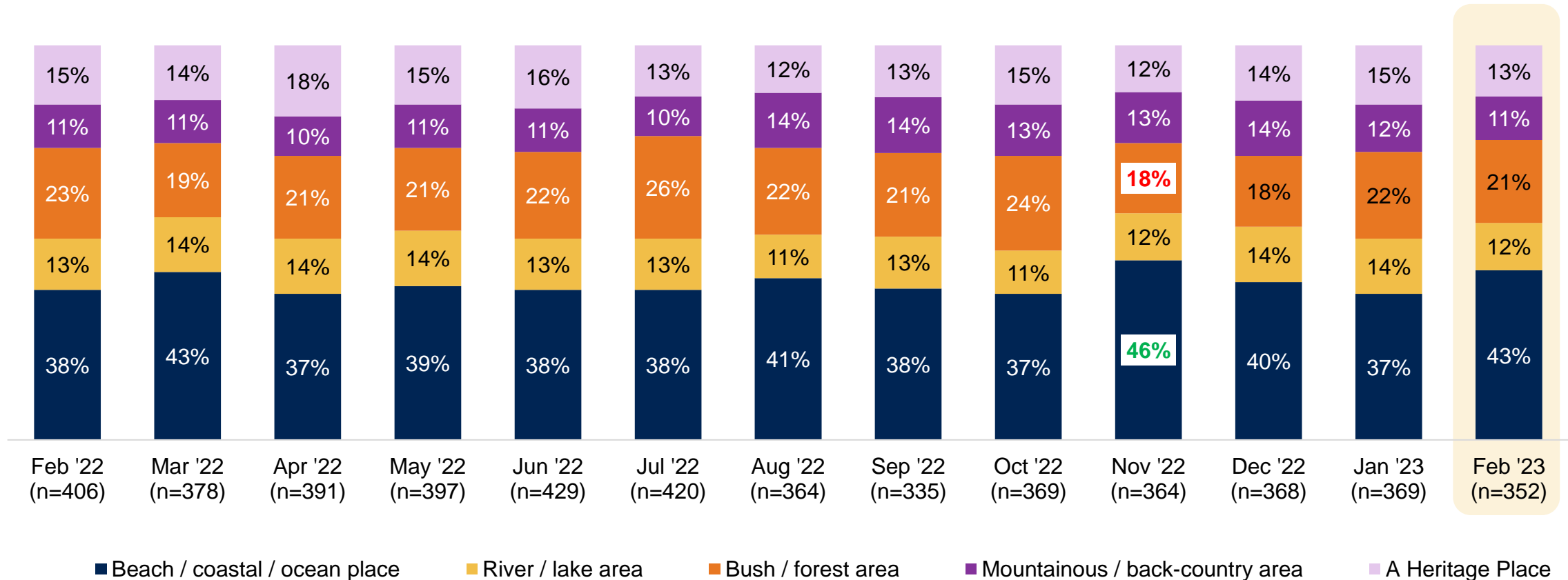
Green / red indicates significantly higher / lower than previous month

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 *beach/coastal/ocean* place is important to them has increased this month.

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



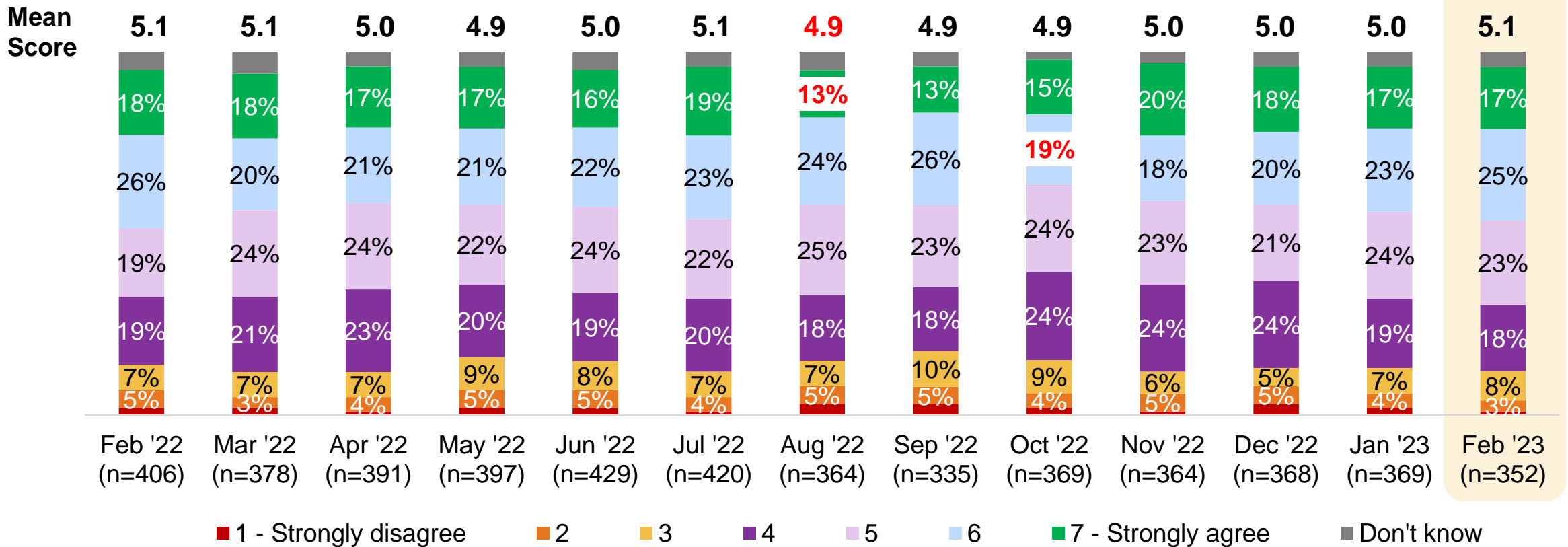
Green / red indicates significantly higher / lower than previous month

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, with a slight increase in those giving a score of 6.

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



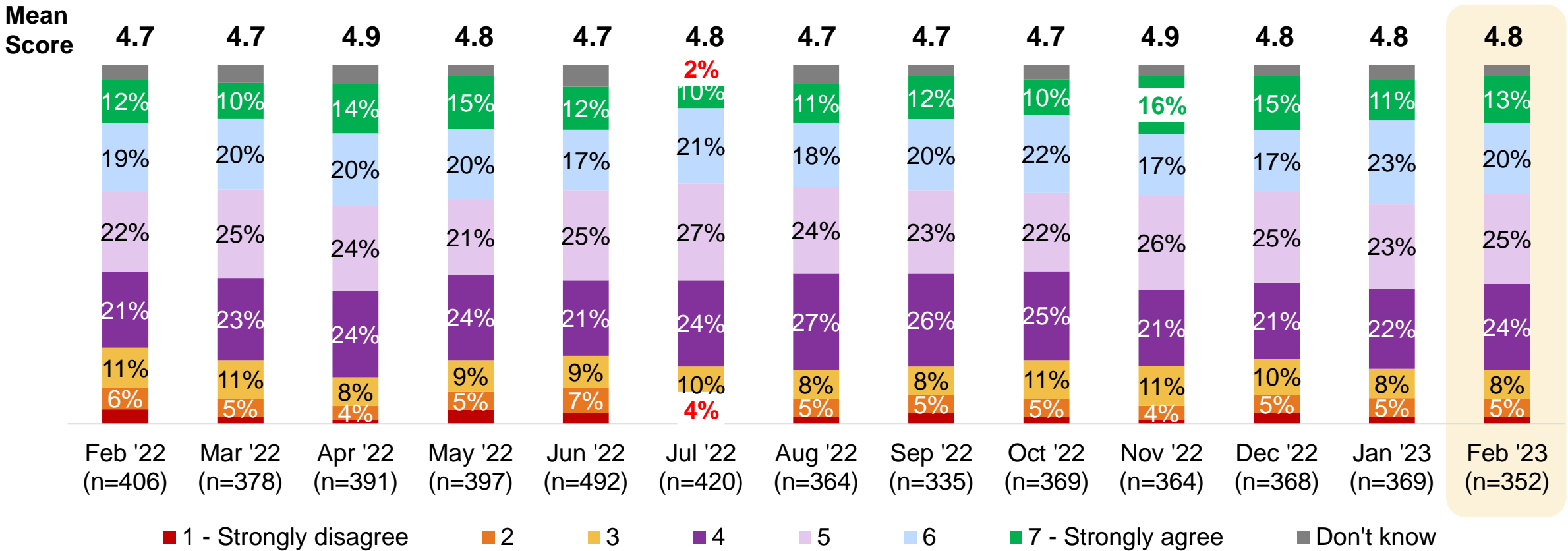
Green / red indicates significantly higher / lower than previous month

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

Base: Those who live near or regularly visit this place

Agreement that *visitors improve the quality of life of the local communities* remains similar to last month and this time last year.

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



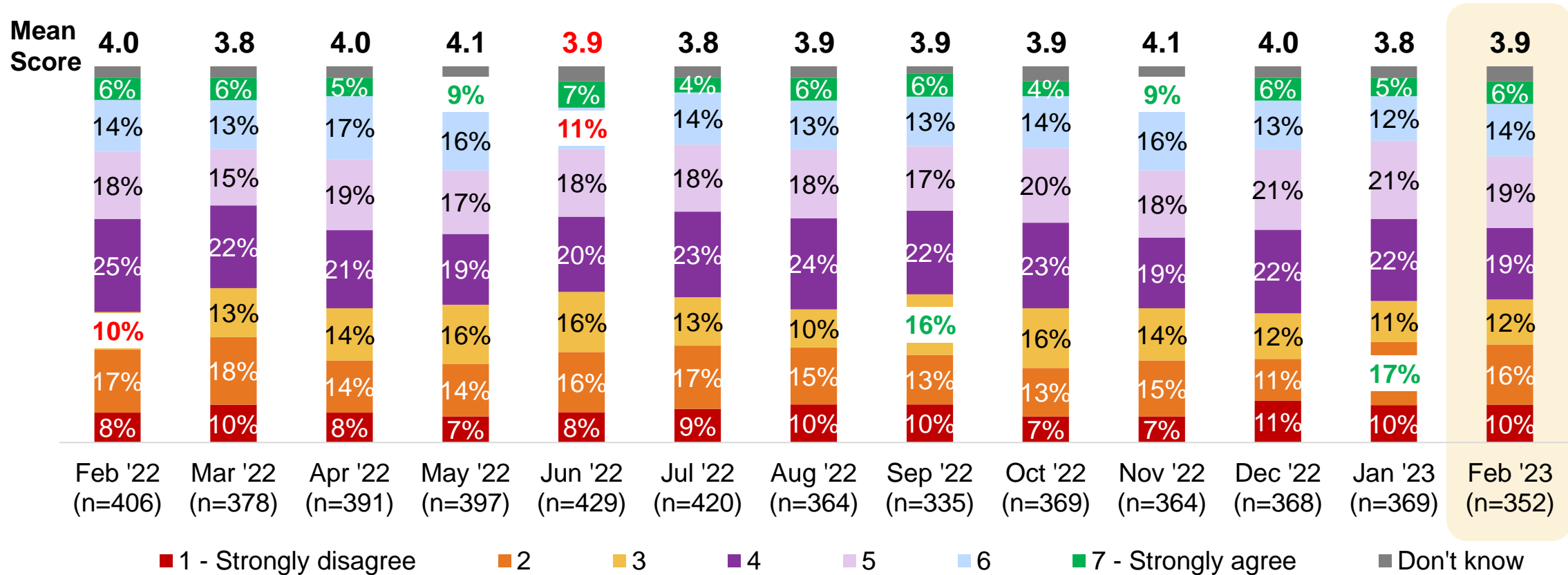
Green / red indicates significantly higher / lower than previous month

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* has increased slightly compared to last month, with more people giving a rating of 6-7.

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



Green / red indicates significantly higher / lower than previous month

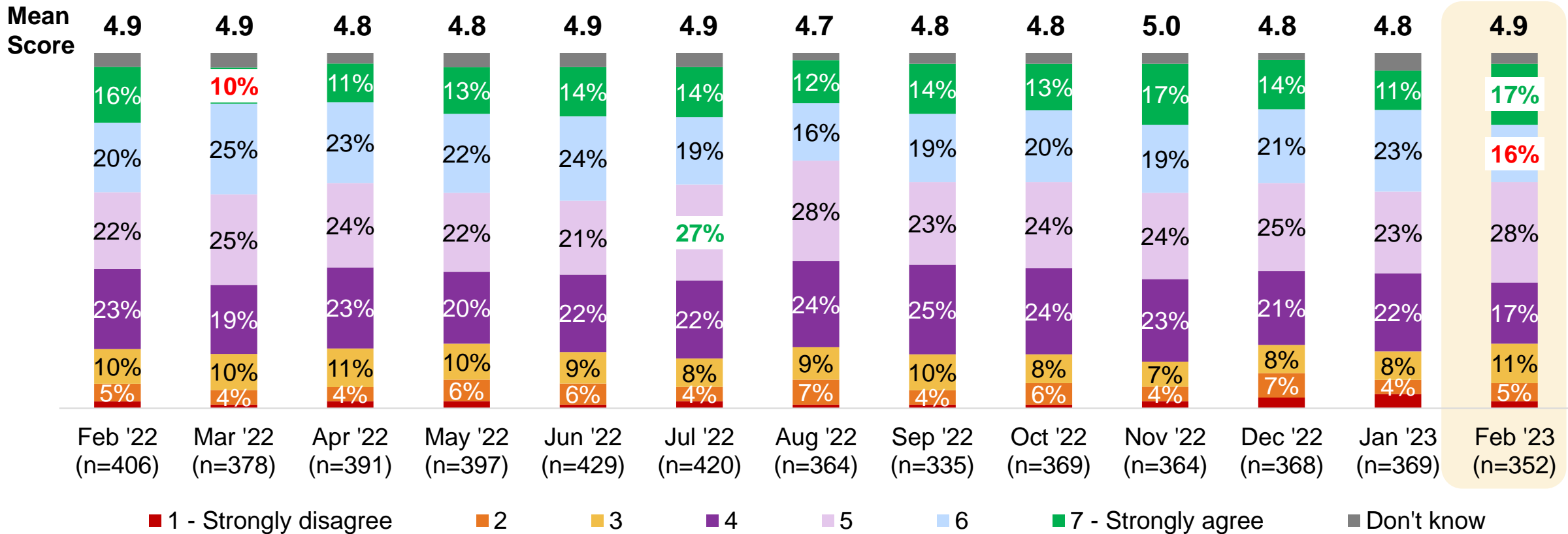
Q42: How much do you agree or disagree with each of the following statements?

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 has significantly increased.

Green / red indicates significantly higher / lower than previous month

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

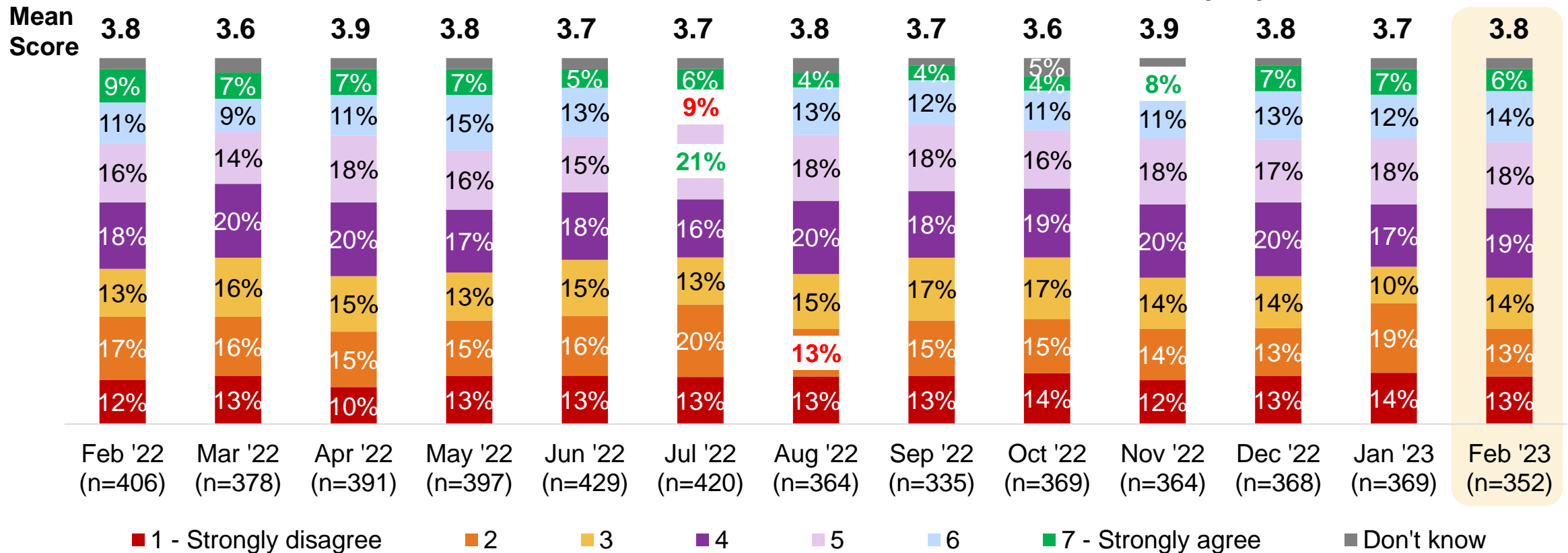


Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place

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

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



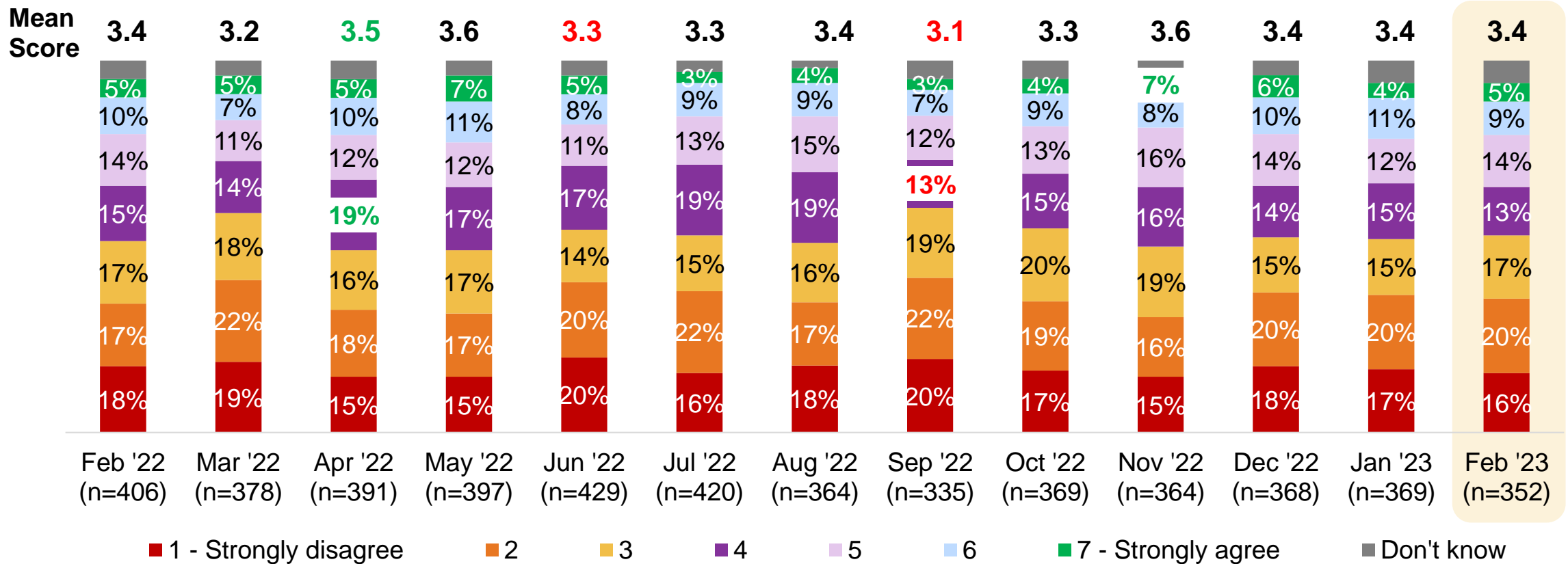
Green / red indicates significantly higher / lower than previous month

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

Base: Those who live near or regularly visit this place

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

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



Green / red indicates significantly higher / lower than previous month

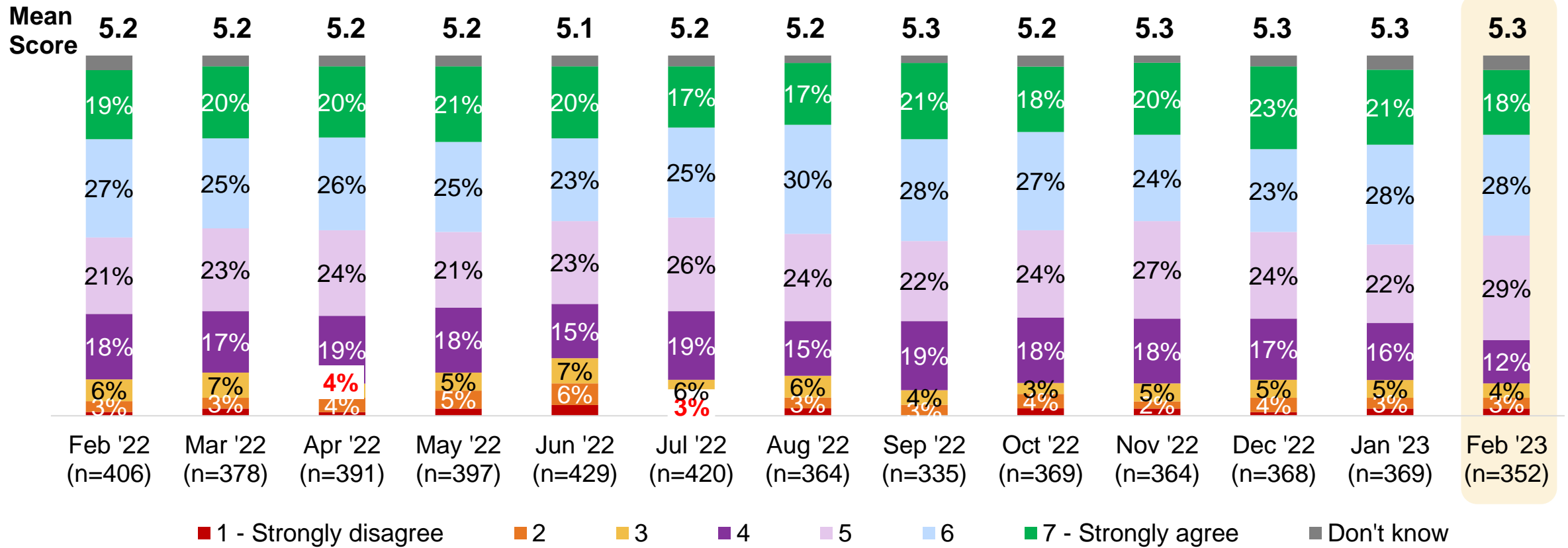
Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place

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

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



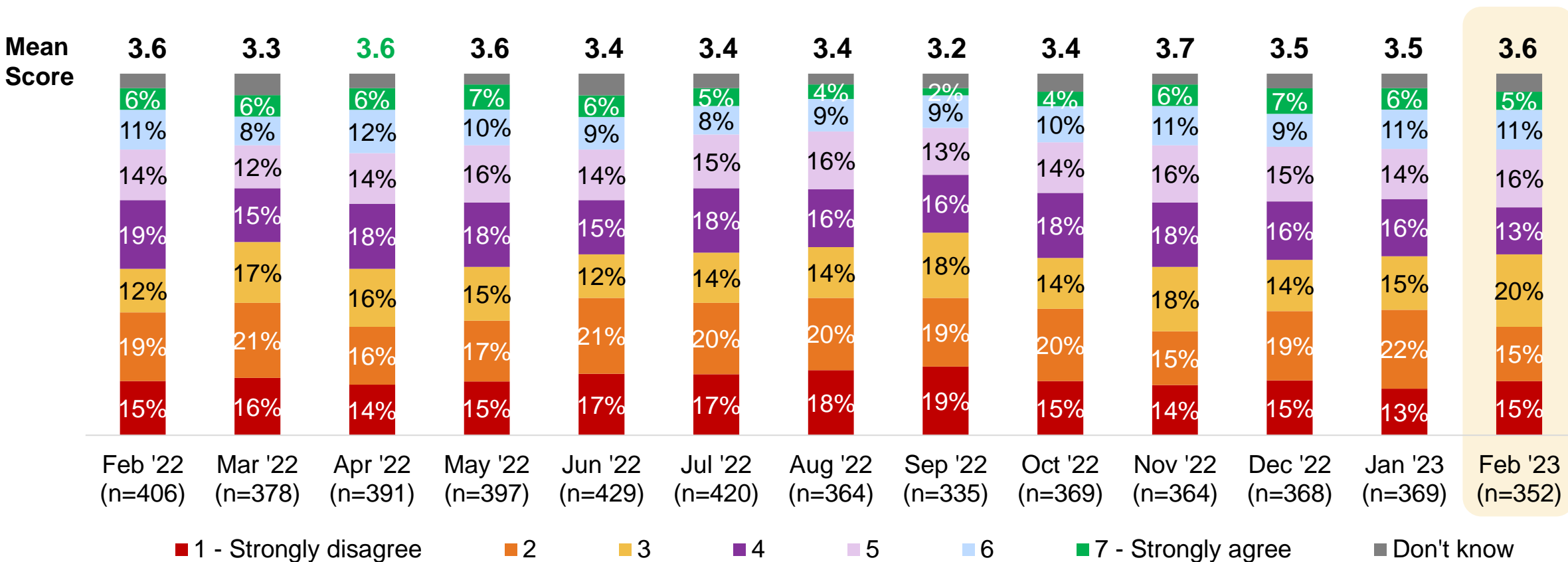
Green / red indicates significantly higher / lower than previous month

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

Base: Those who live near or regularly visit this place

This month, more people agree that *visitors add unwanted financial burdens to local communities*.

“Visitors to this Protected Natural Area add unwanted financial burdens onto the local communities”








Green / red indicates significantly higher / lower than previous month

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

Base: Those who live near or regularly visit this place

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People are more likely to see positive effects for *heritage places* and negative effects for *river / lake* and *back country* communities, while impressions about the effects on *bush / forest* communities tend to be more neutral.

		Mean*					
							
		n=	Beach / Coast	River / Lakes	Bush / Forest	Back-Country	Heritage Place
		5,771	2,229	738	1,255	687	862
Positive Effects	Visitors to this Protected Natural Area improve the local economy	5.2	5.3	5.2	5.0	5.2	5.1
	Visitors to this Protected Natural Area enable stories, identities & traditions to be shared between visitors & local people	5.0	4.9	5.1	4.8	5.1	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	5.0
	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
	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	4.1	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	3.8	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
	AVERAGE AGREEMENT WITH NEGATIVE STATEMENTS (lower numbers are better)	3.7	3.7	3.9	3.4	3.8	3.6

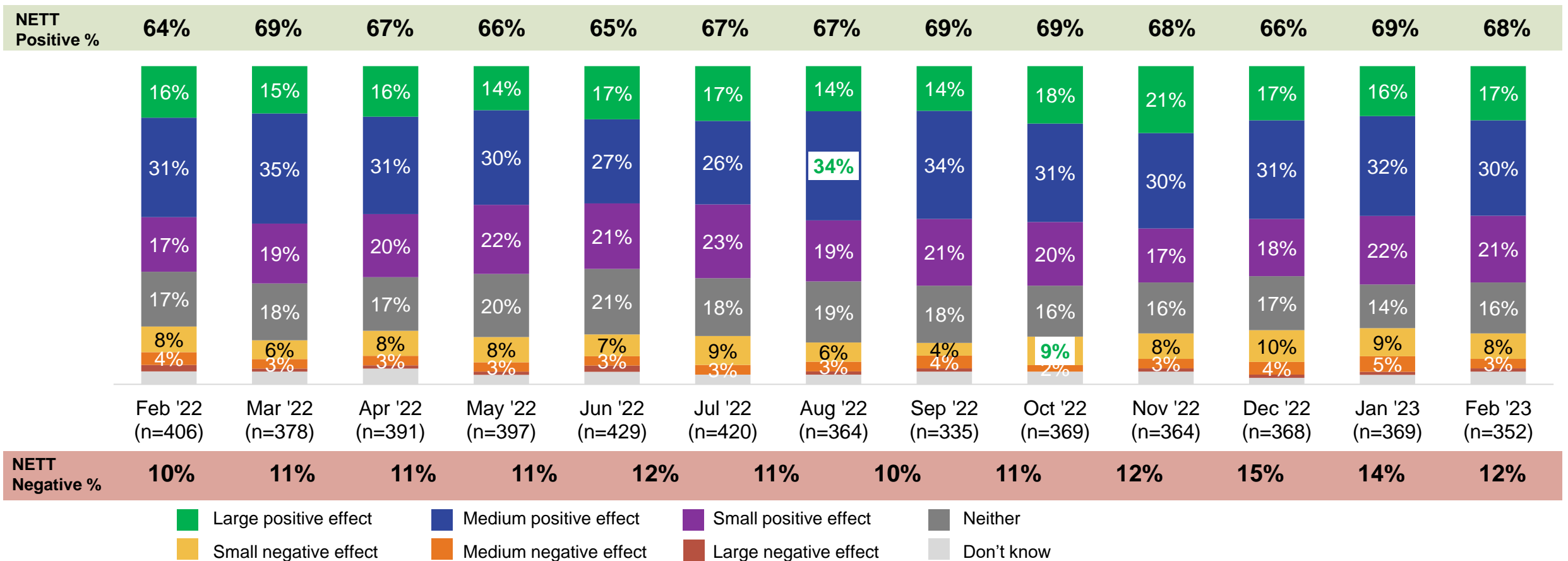
Green / red indicates significantly higher / lower than total

Q41: Which of the following best describes the location of this place? Q42: How much do you agree or disagree with each of the following statements?

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

The majority of residents & visitors to Protected Natural Areas continue to have positive views on the effect of visitors. Perception of negative effects has decreased.

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

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

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

