

# DOC PUBLIC PULSE OF CONSERVATION

April 2023 Topline Report for March 2023 Activity

Jonathan Dodd

2 May 2023



GAME CHANGERS



# KEY FINDINGS – APRIL '23

## (COVERING MARCH '23 ACTIVITY)

- March visitation to Protected Natural Areas significantly increased since February (49% vs 44%). This follows a significant decline in February activity which coincided with Cyclone Gabrielle. Visitation to Protected Natural Areas is now on par with a year ago.
- Despite the number of people visiting PNAs and PHPs being the same as a year ago, they are visiting less frequently - the average number of visits to Protected Natural Areas and Protected Heritage Places in the last month (March '23) is lower compared to a year ago.
- Satisfaction with the overall experience at Protected Natural Areas remained stable this month and also when compared to a year ago.
- Satisfaction with the overall experience at Protected Heritage Places remained stable this month despite a significant drop in those rating their experience as good when compared to a year ago.
- More people said that their visit to a Protected Heritage Place was emotionally uplifting and meaningful, now in line with levels seen last year. The same also applies to the number of people saying their visit was one of the best ever had.
- NPS for both Protected Natural Areas and Protected Heritage Places remains lower than a year ago. Protected Natural Areas NPS is 28, following a significant decrease last month. Protected Heritage Places NPS is 12. A year ago these were 34 and 23, respectively.
- The number of people who strongly agree that their Protected Natural Area of personal importance to them is damaged by visitors has increased.



# SUMMARY


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

# BACKGROUND & METHODOLOGY



**Sample size**

**1,000**




**Fieldwork dates**  
April 10-19, 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

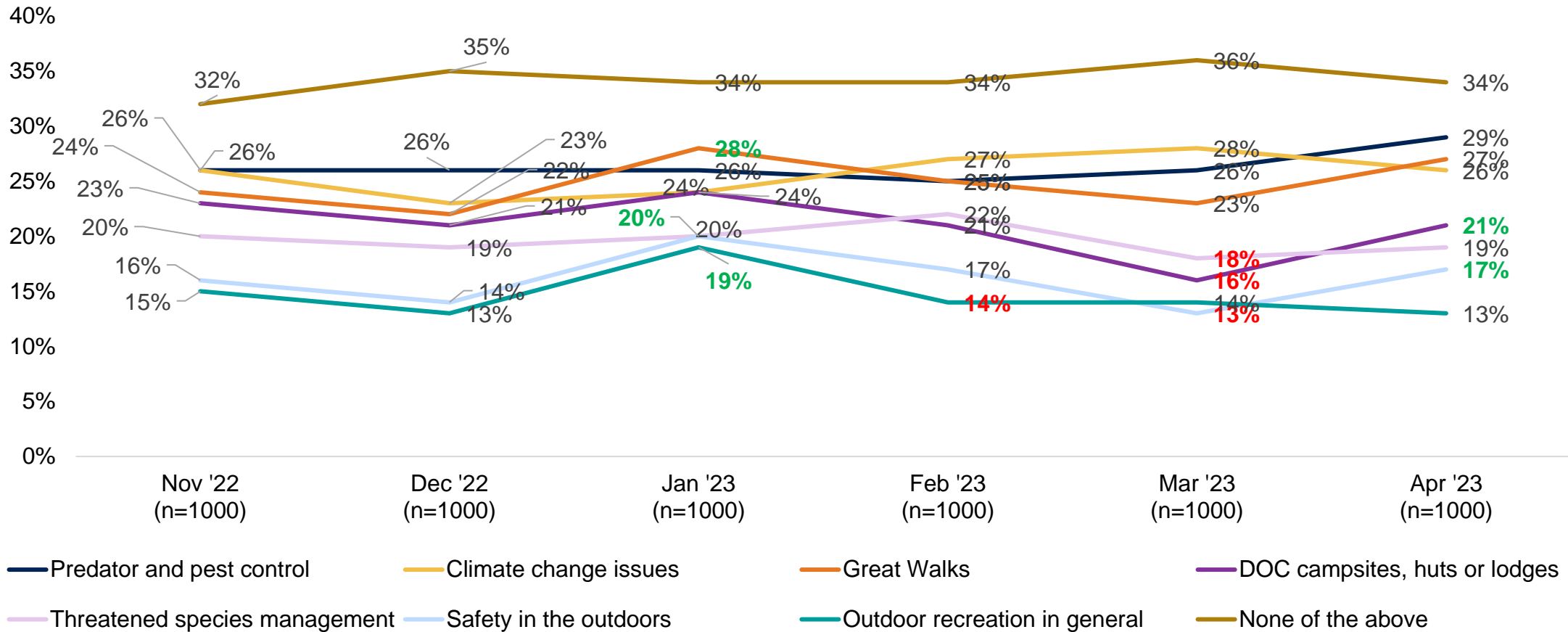
Oct 21	1–7 October, 2021
Nov 21	5–12 November, 2021
Dec 21	3–9 December, 2021
Jan 22	6–15 January, 2022
Feb 22	5–15 February, 2022
Mar 22	3–10 March, 2022
Apr 22	1–11 April, 2022
May 22	5–16 May, 2022
Jun 22	3–11 June, 2022
Jul 22	4–13 July, 2022
Aug 22	15-24 August, 2022
Sep 22	7-17 September, 2022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

# DOC MEDIA PROFILE



In April, significantly more people recalled hearing about *DOC campsites, huts, or lodges*; and *safety in the outdoors*, returning to levels from early 2023.

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

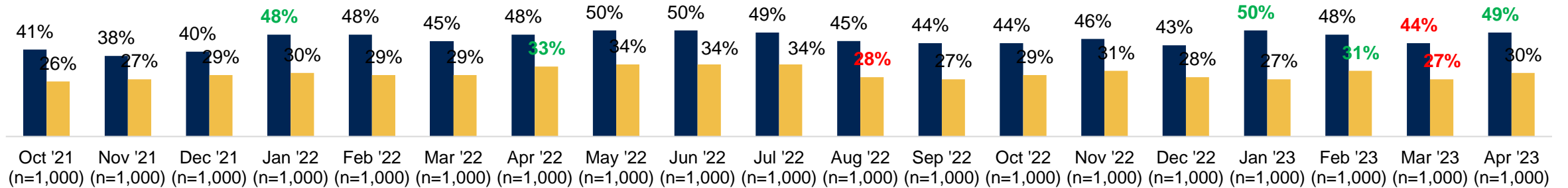


Q50: Which, if any, of the following aspects of the Department of Conservation have you seen, read, or heard about in the past 4 weeks? \*Note: Top-8 responses are shown.

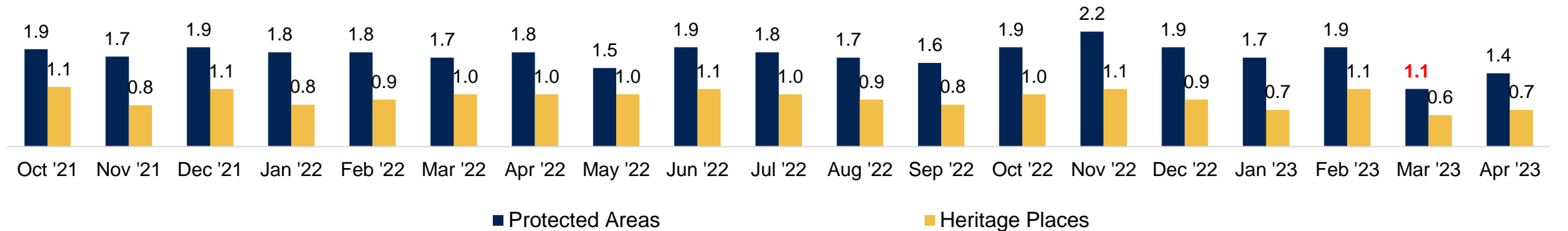
# VISITATION FREQUENCY

Although visitation to Protected Natural Areas recovered from a decline in March, average visitation frequency was lower compared to a year ago. Visitation to Protected Heritage areas remained 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\*

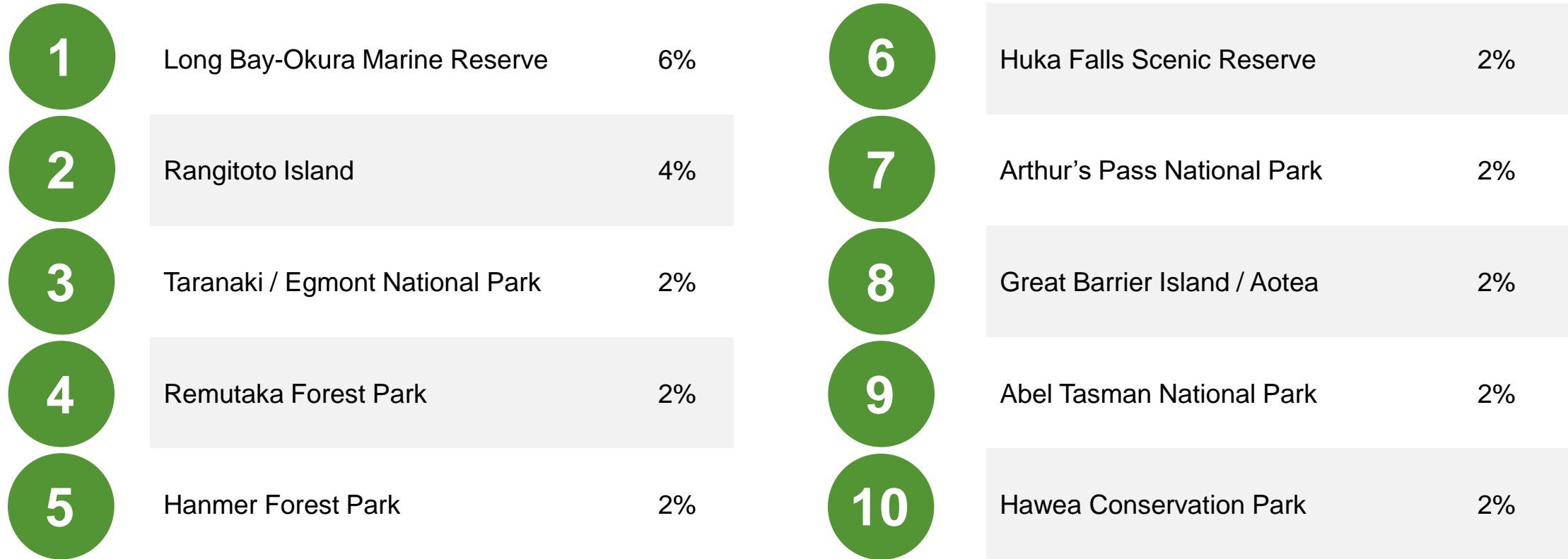


Green / red indicates significantly higher / lower than previous month

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.



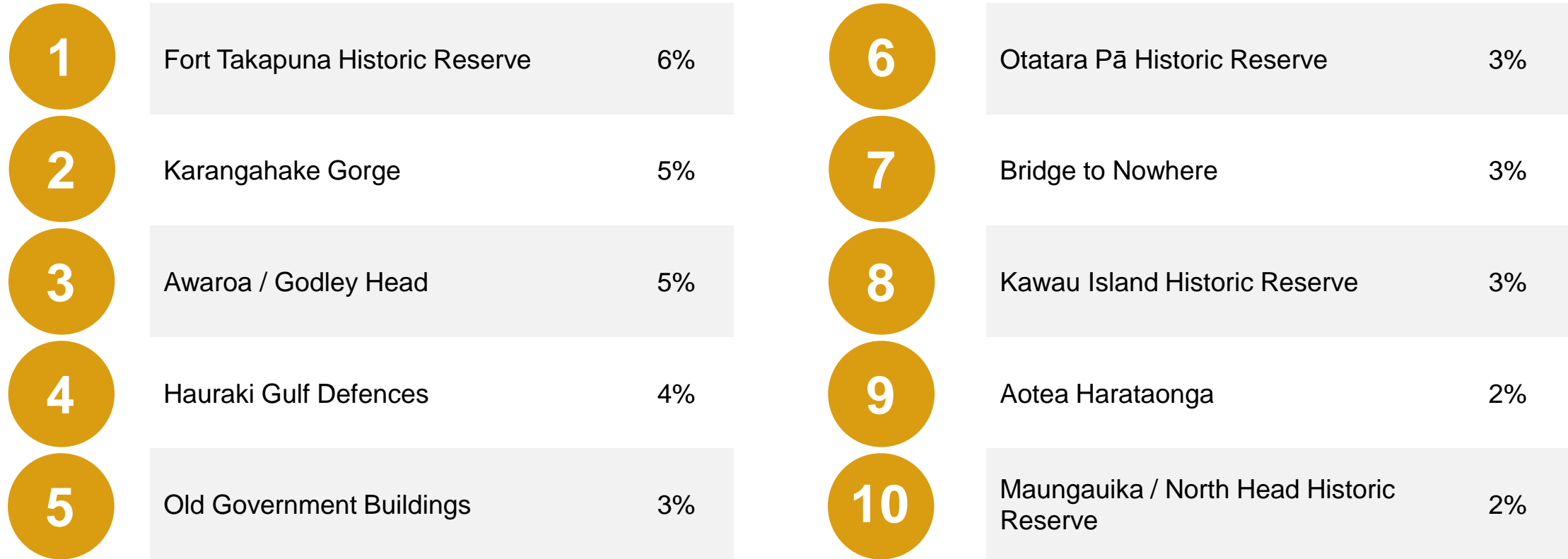
# TOP-10 PROTECTED NATURAL AREAS VISITED: JUN 2021–APR 2023.



**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=10,362)

# TOP-10 PROTECTED HERITAGE PLACES VISITED: JUN 2021–APR 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=6,805)

# In the March period significantly more people were going *sightseeing* 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
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
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%
Sightseeing	30%	29%	32%	29%	29%	24%	31%	27%	30%	30%	32%	31%	30%	35%	34%	28%	31%	27%	32%	34%	28%	35%
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%
Photography	25%	26%	26%	21%	22%	21%	24%	24%	27%	24%	25%	24%	25%	26%	26%	26%	27%	26%	28%	27%	26%	26%
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%
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%
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%
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%
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%
Camping	12%	12%	14%	14%	14%	12%	16%	14%	13%	12%	11%	11%	11%	11%	8%	10%	11%	11%	12%	13%	8%	10%
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%

Green / red indicates significantly higher / lower than previous month

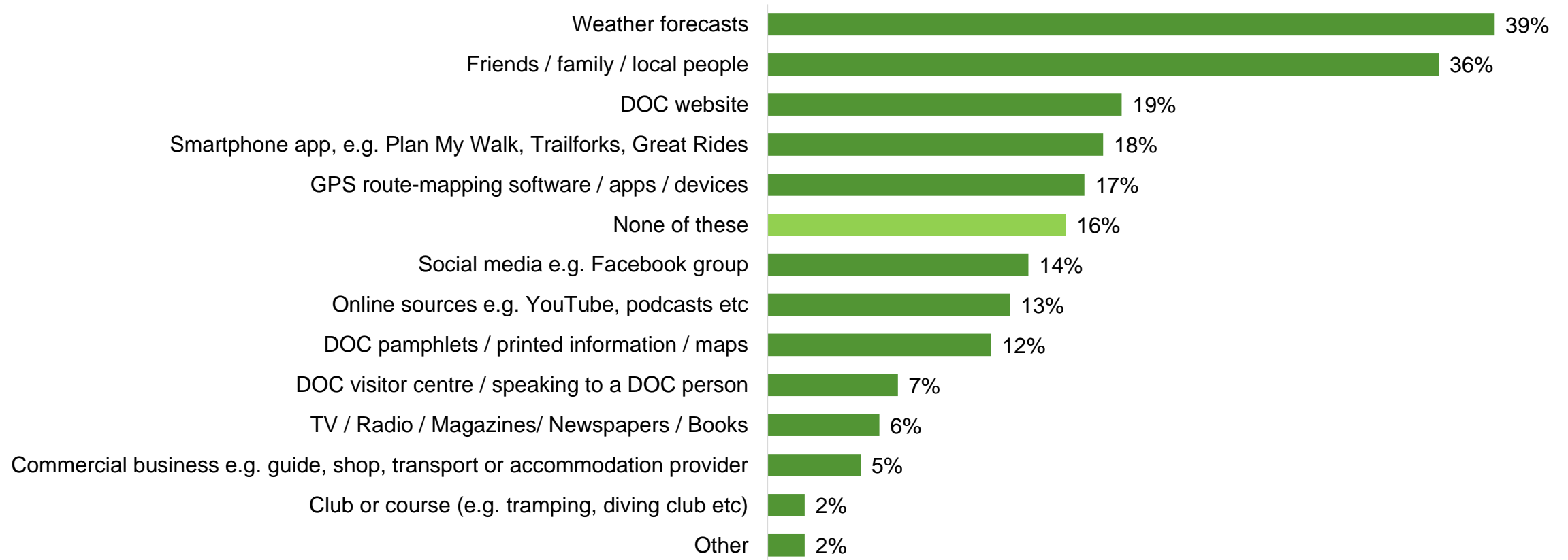
Q12: Thinking about your most recent visit to <LOCATION SELECTED IN Q8>, which of the following activities did you engage in?

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.

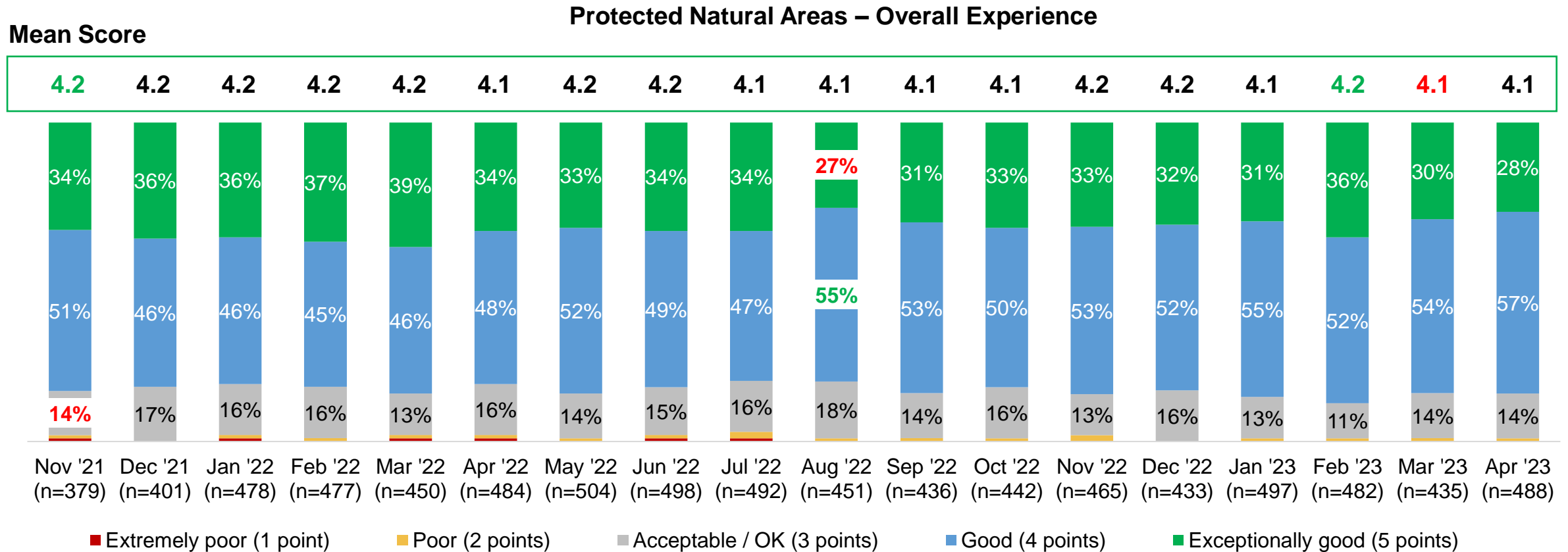
## Sources of Information used for Planning



**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)

# Satisfaction with the *overall experience* at Protected Natural Areas has not changed since the significant decrease in March.



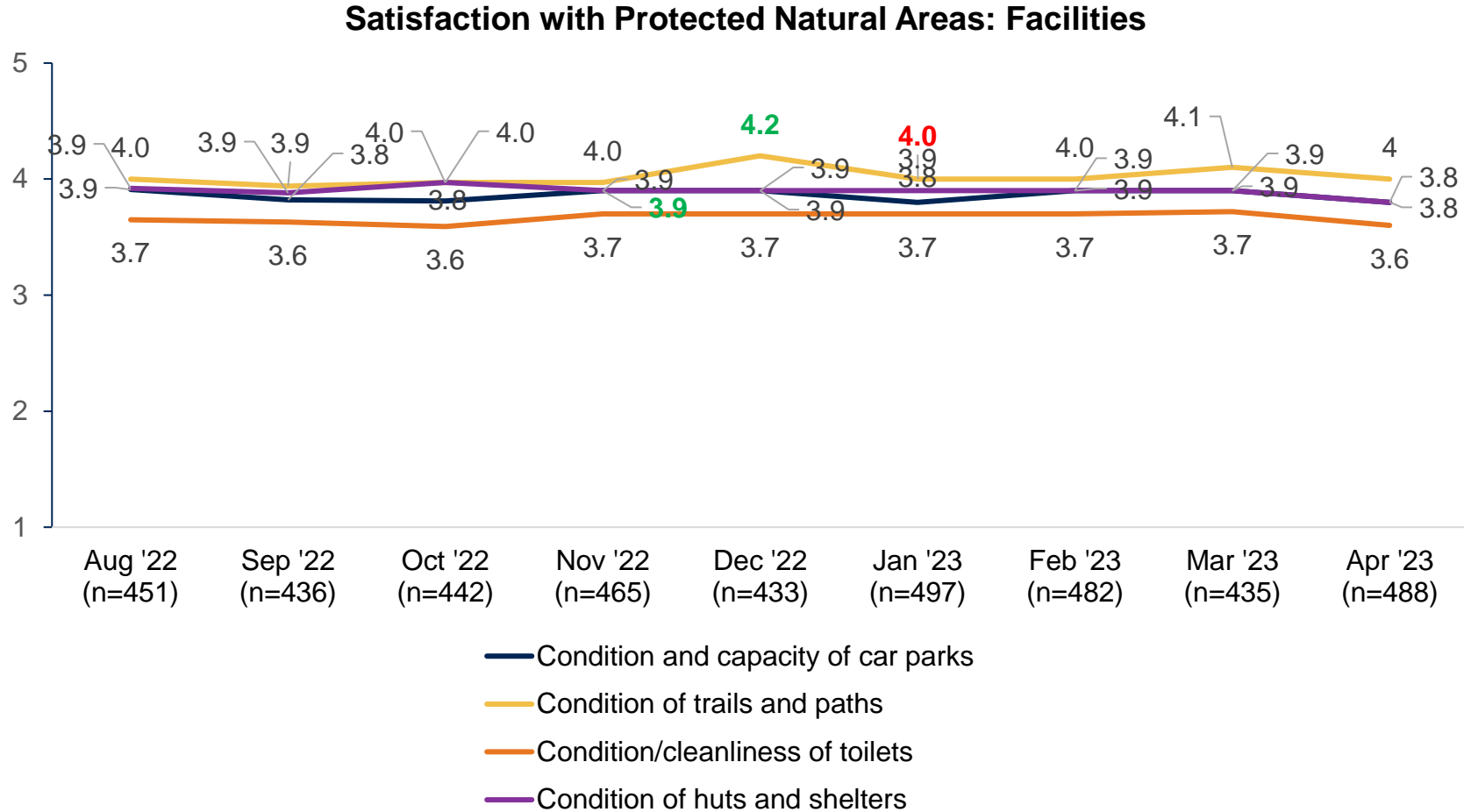
Q15: Overall, how would you rate your experience at <LOCATION SELECTED IN Q8>?

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

Green / red indicates significantly higher / lower than previous month

# Compared to last month, visitors' satisfaction across all facilities of Protected Natural Areas dropped slightly.

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



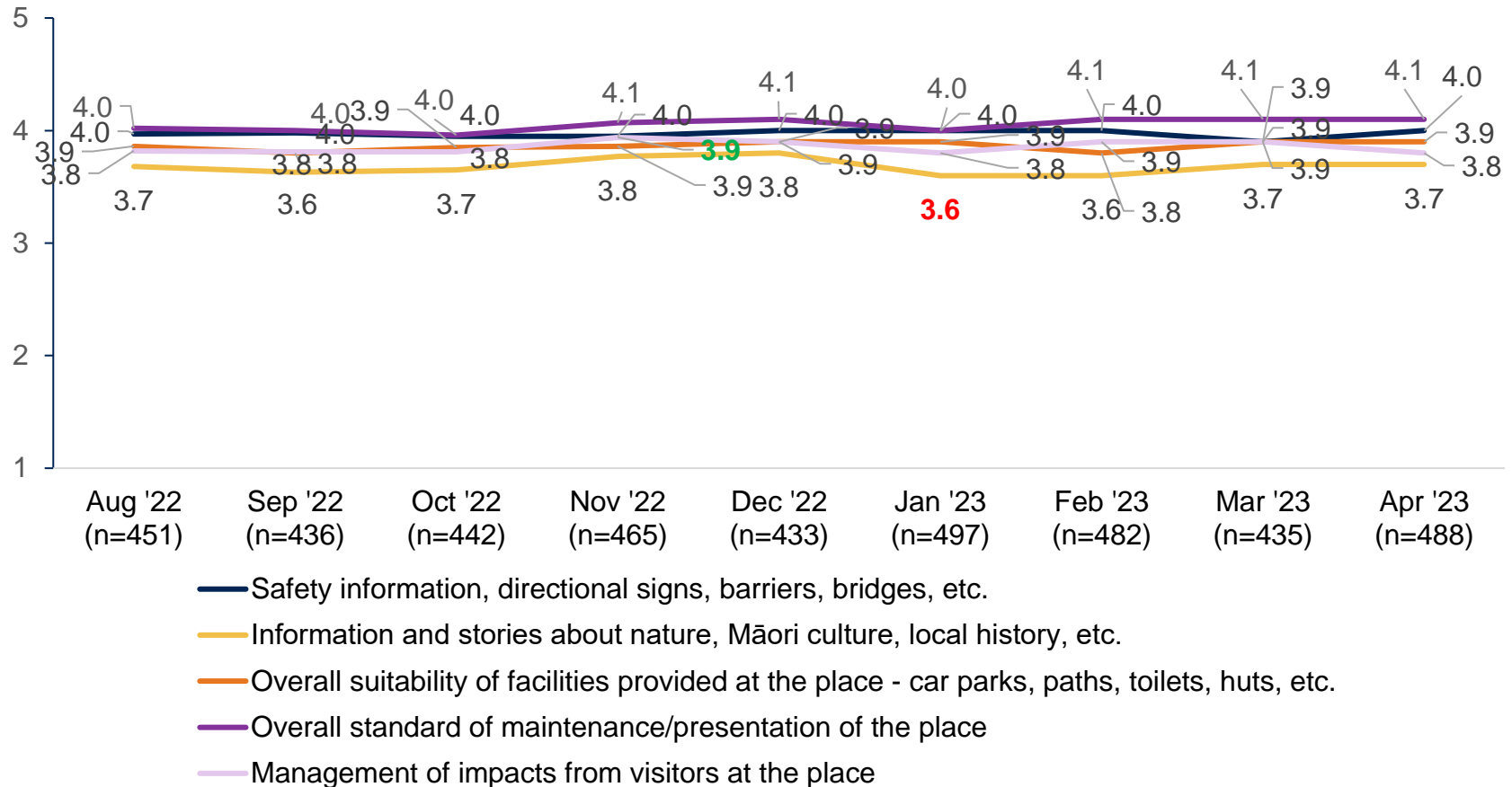
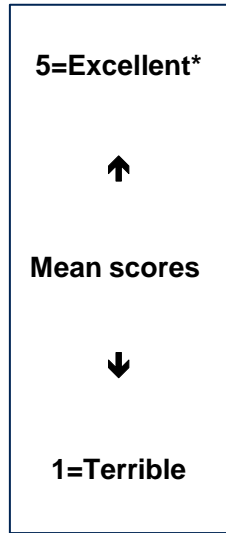
Green / red indicates significantly higher / lower than previous month

**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 remained high, with a slight increase in satisfaction with *safety information*.

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



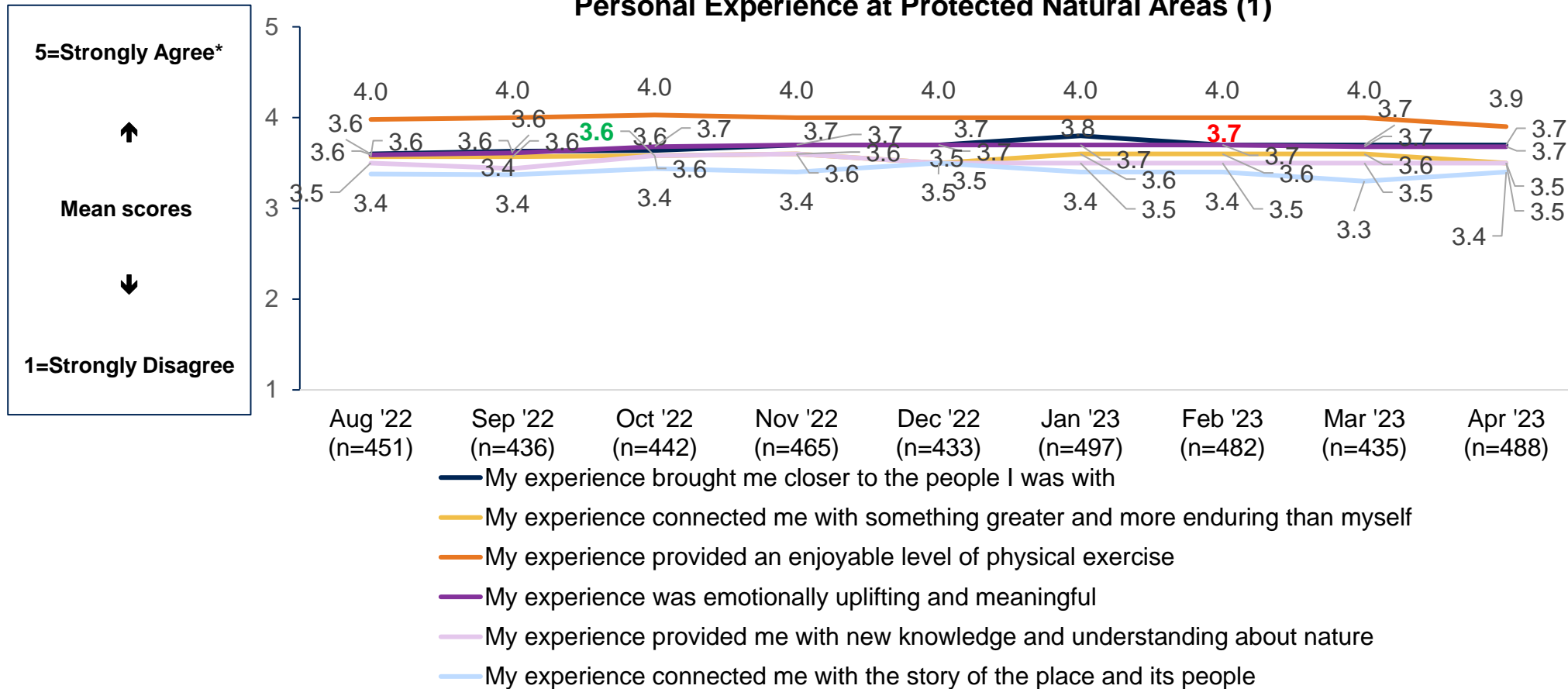
Green / red indicates significantly higher / lower than previous month

**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.



# Measures of personal experience have remained fairly high.



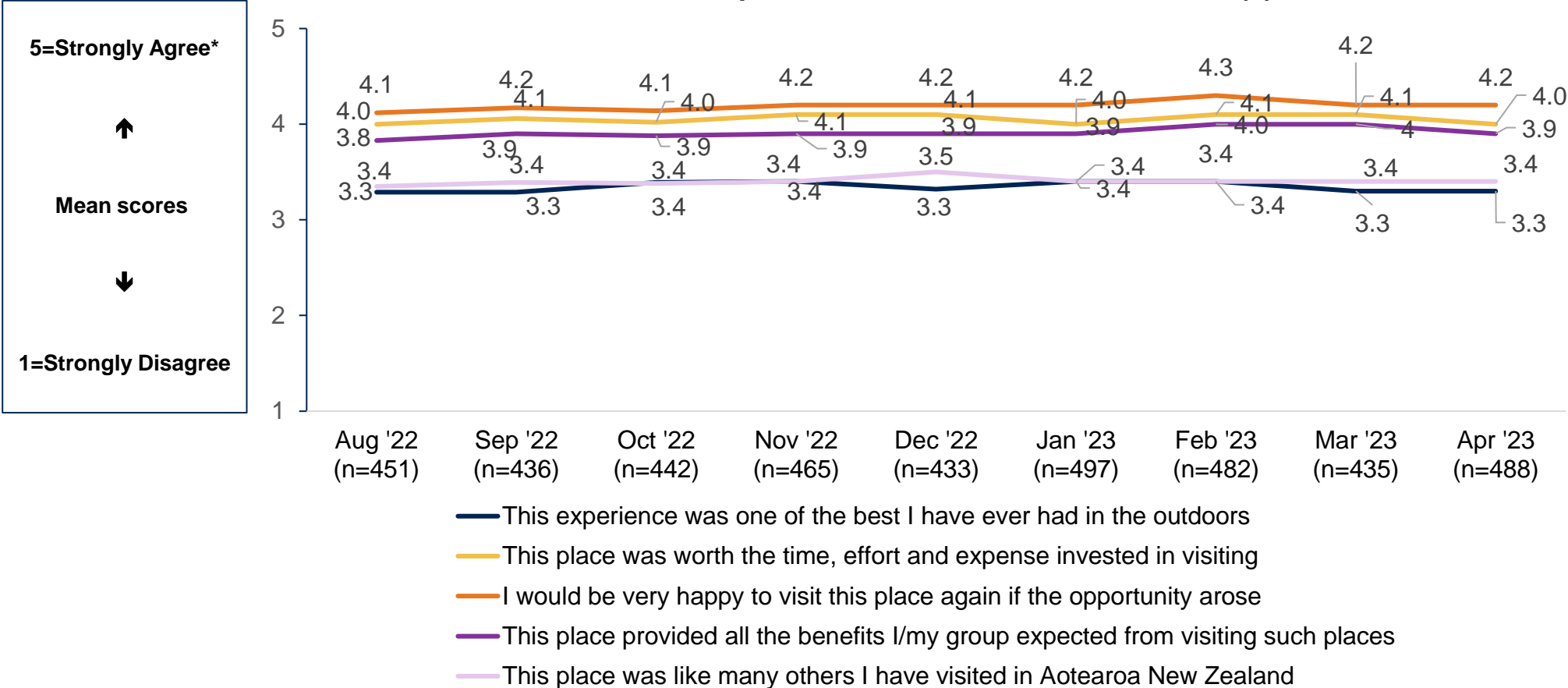
Green / red indicates significantly higher / lower than previous month

**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.

# Measures of personal experience have remained fairly high.

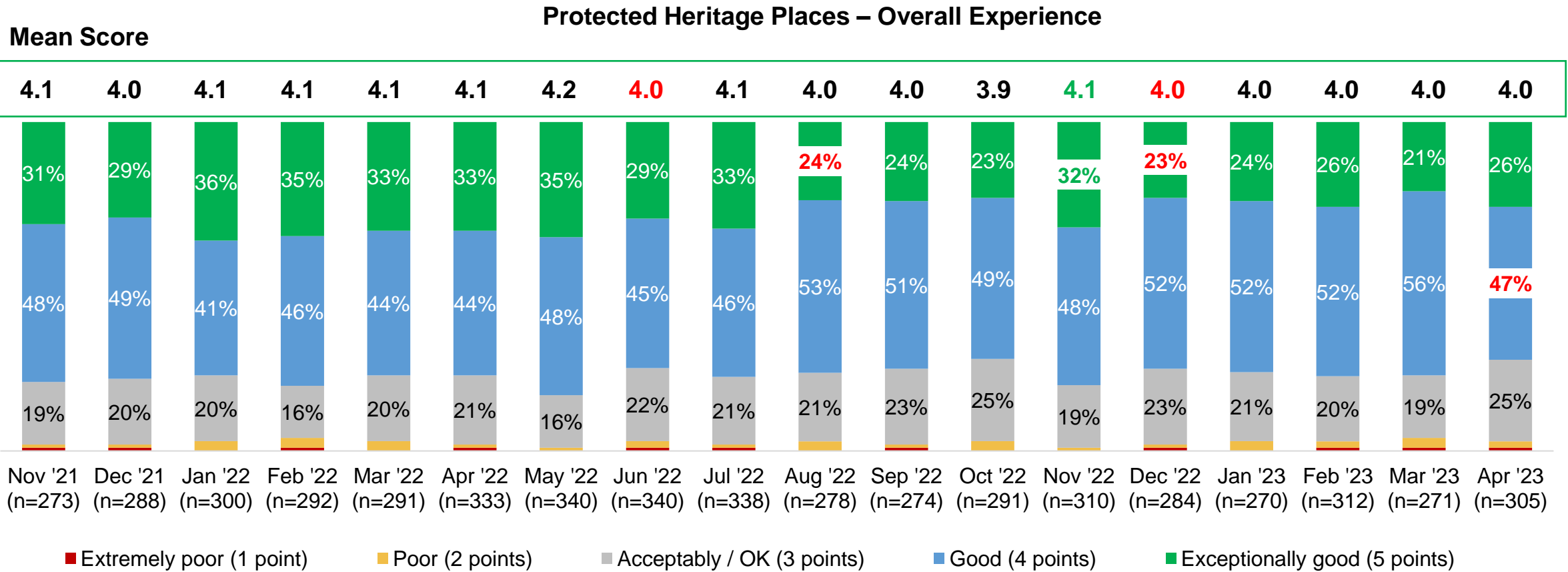
**Personal Experience at Protected Natural Areas (2)**



**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.

Ratings of overall experience remain stable despite a significant drop in those rating their experience as *good* when compared to a year ago.



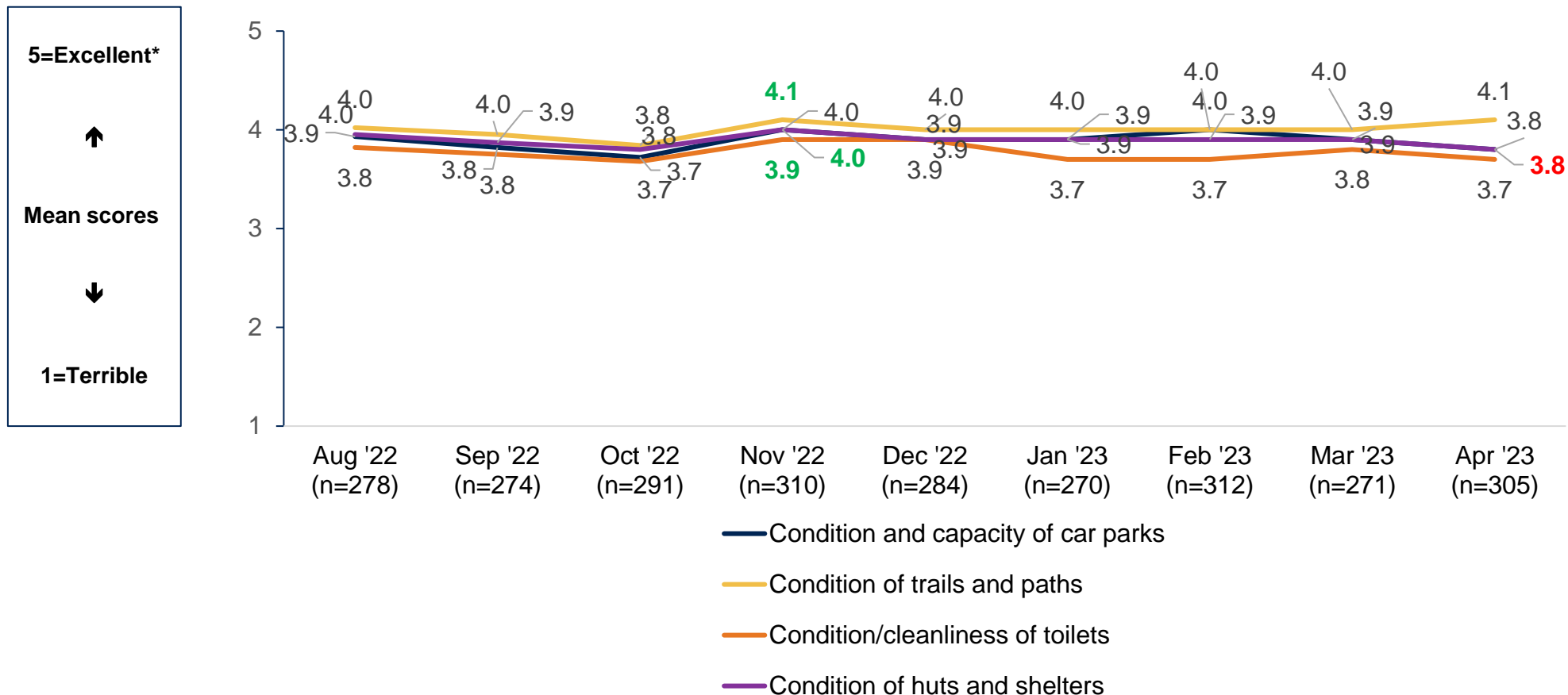
Green / red indicates significantly higher / lower than previous month

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

# Visitors' satisfaction of the *condition and capacity of car parks* significantly dropped. Satisfaction with *conditions of trails and paths* remained high.

Satisfaction with Protected Heritage Places: Facilities

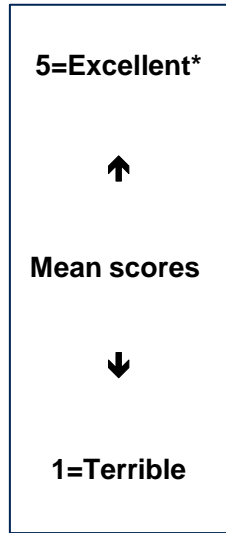


Green / red indicates significantly higher / lower than previous month

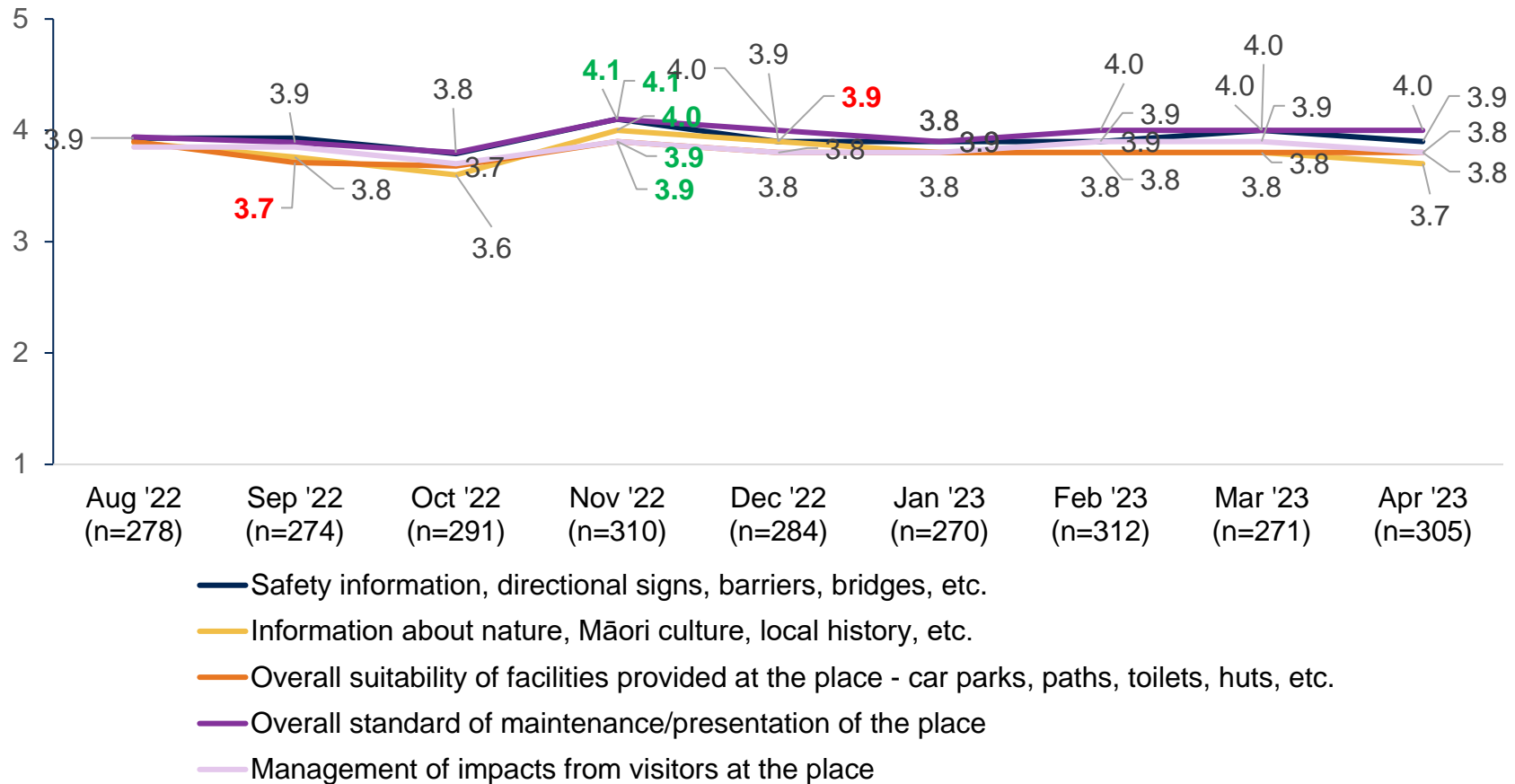
**Q26a:** Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how would you rate the following aspects listed below?

**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



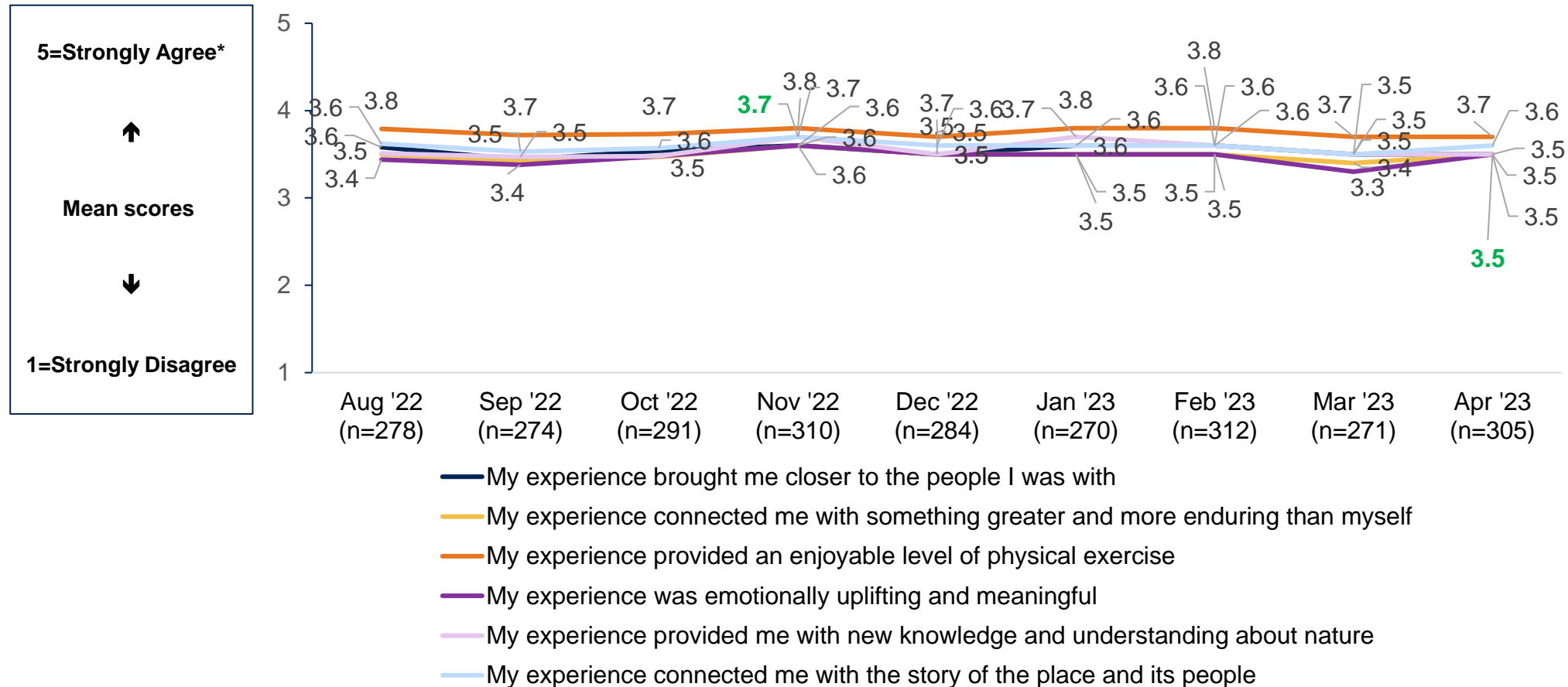
Green / red indicates significantly higher / lower than previous month

**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.

The number of people saying their visit to a PHP was *emotionally uplifting and meaningful* significantly increased this month – seeing a return to usual levels.

Personal Experience at Protected Heritage Places (1)

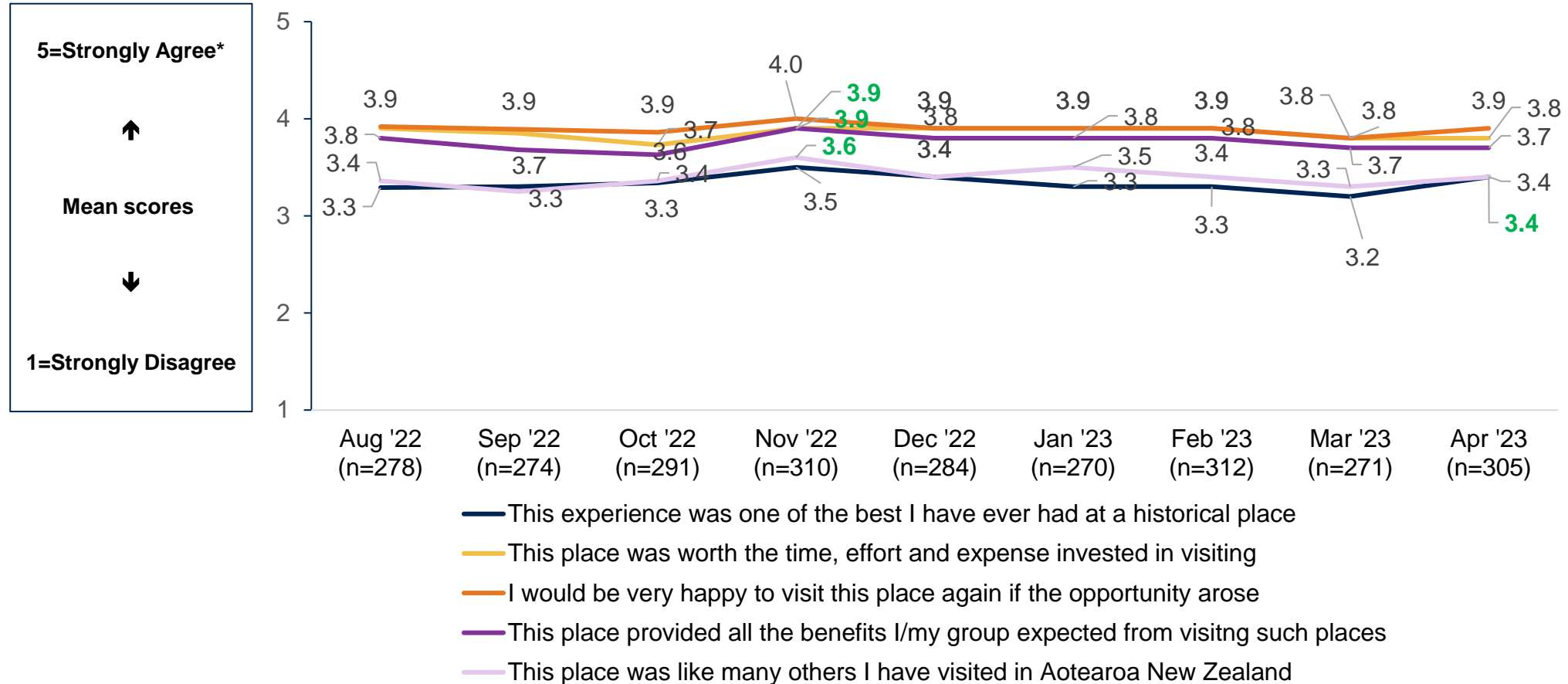


Q26b: Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how much do you agree or disagree with each of the statements below?

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.

# The number of people saying their visit to a PHP was *one of the best ever had* significantly increased this 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?

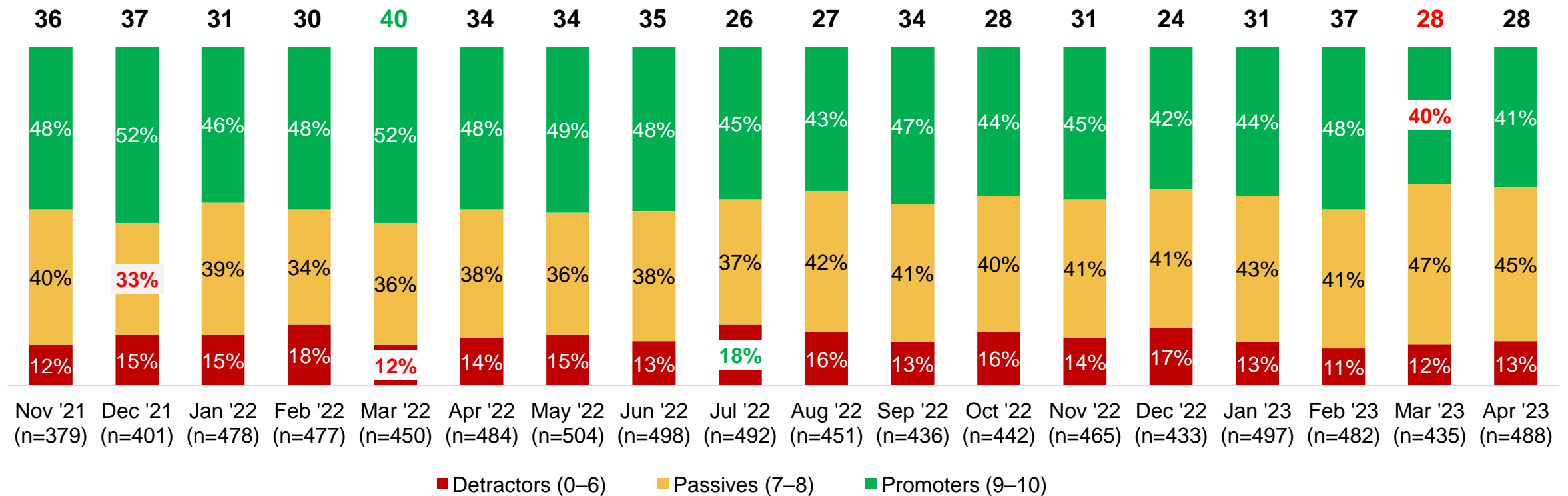
**Base:** Those who visited a Protected Heritage Place in the last month. **\*Note:** The mean score excludes 'Don't know / not applicable' responses. Higher mean scores are desirable.

# NPS



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

Protected Natural Areas – NPS



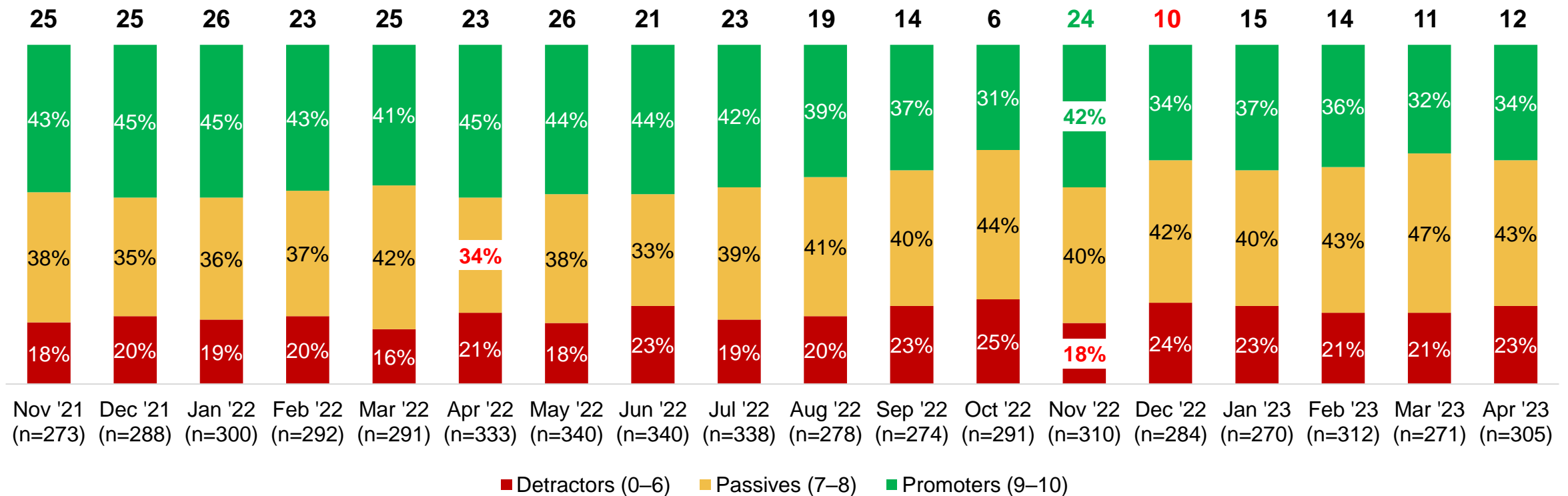
Green / red indicates significantly higher / lower than previous month

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, as the number of passives has gradually increased.

Protected Heritage Places – NPS



Green / red indicates significantly higher / lower than previous month

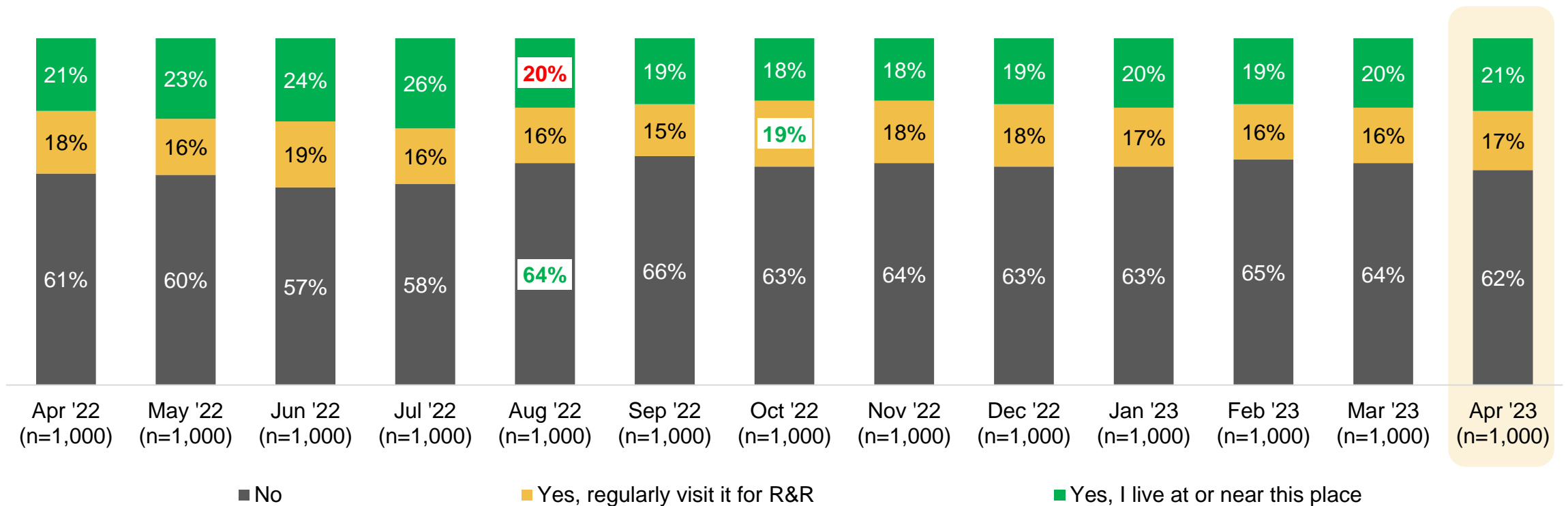
Q28: How LIKELY is it you would RECOMMEND <LOCATION SELECTED IN Q20> to your family or friends?

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 remained stable.

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



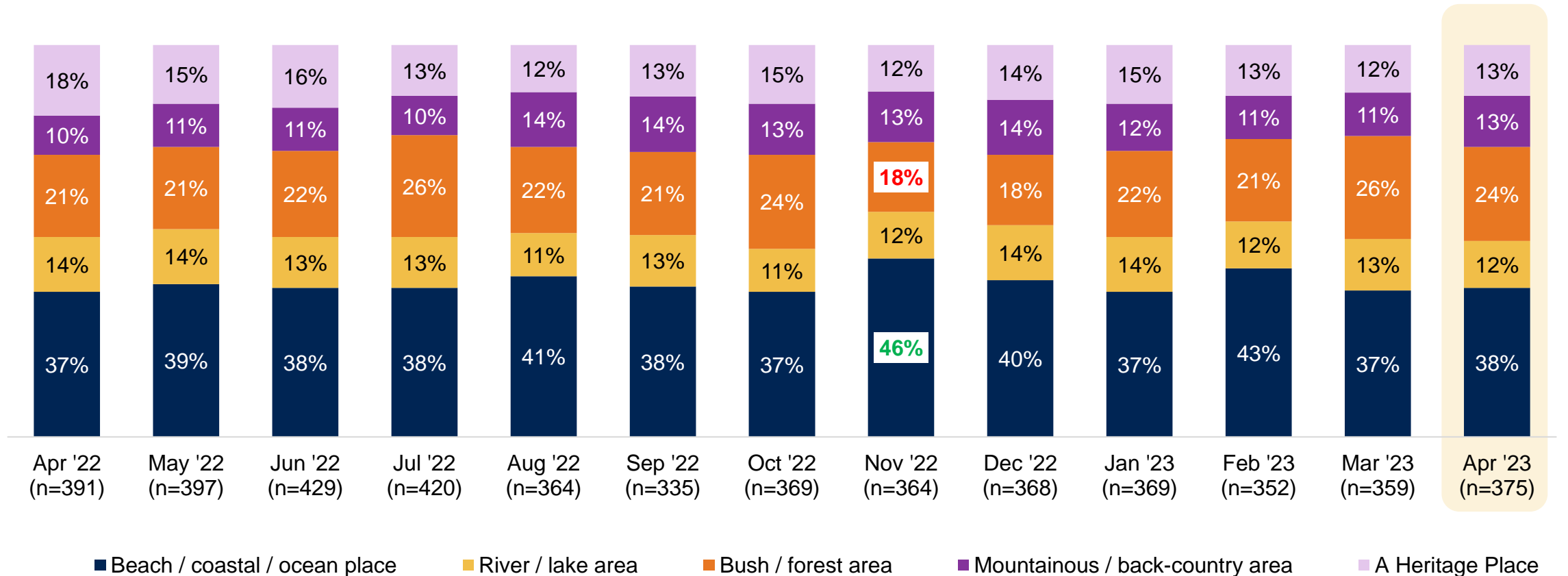
Green / red indicates significantly higher / lower than previous month

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 remain generally stable this month.

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



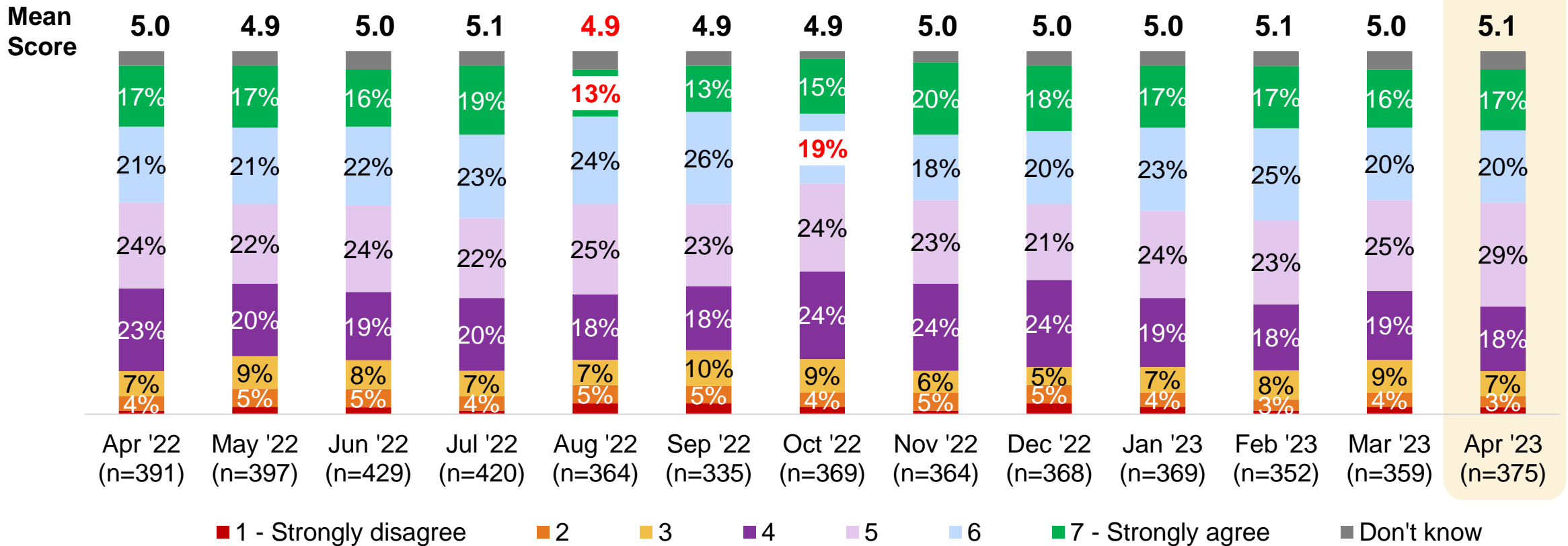
Green / red indicates significantly higher / lower than previous month

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* remained stable this month.

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



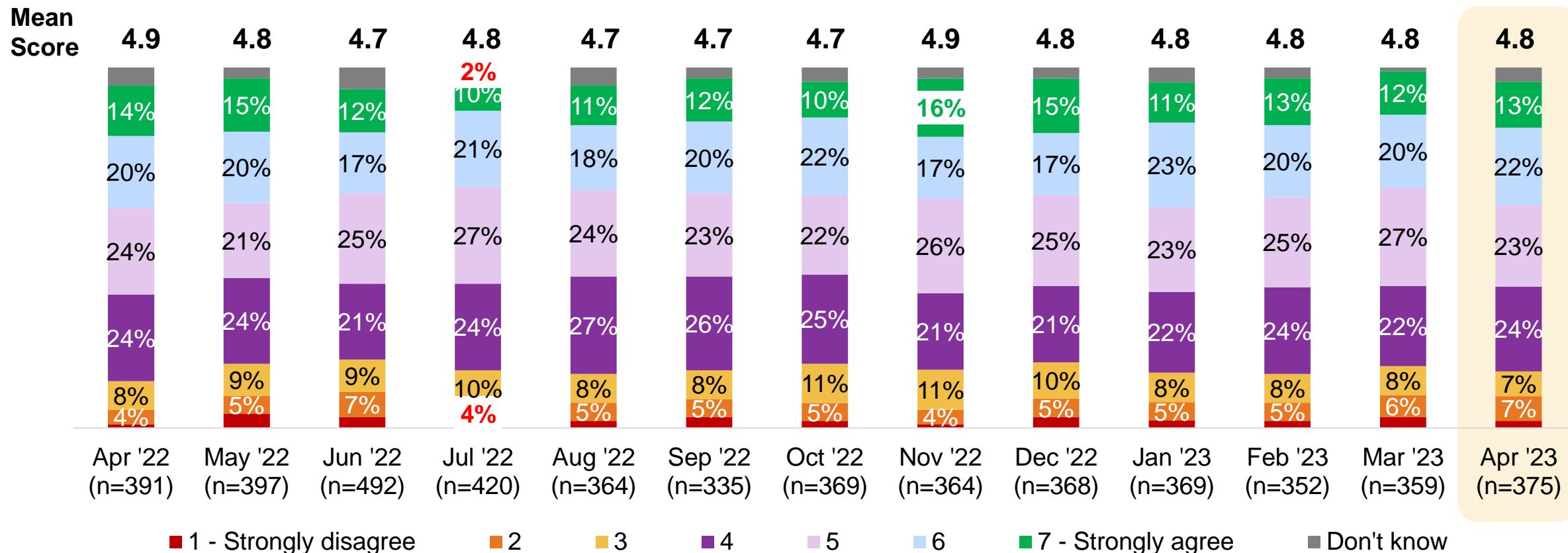
Green / red indicates significantly higher / lower than previous month

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* remained fairly high.

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



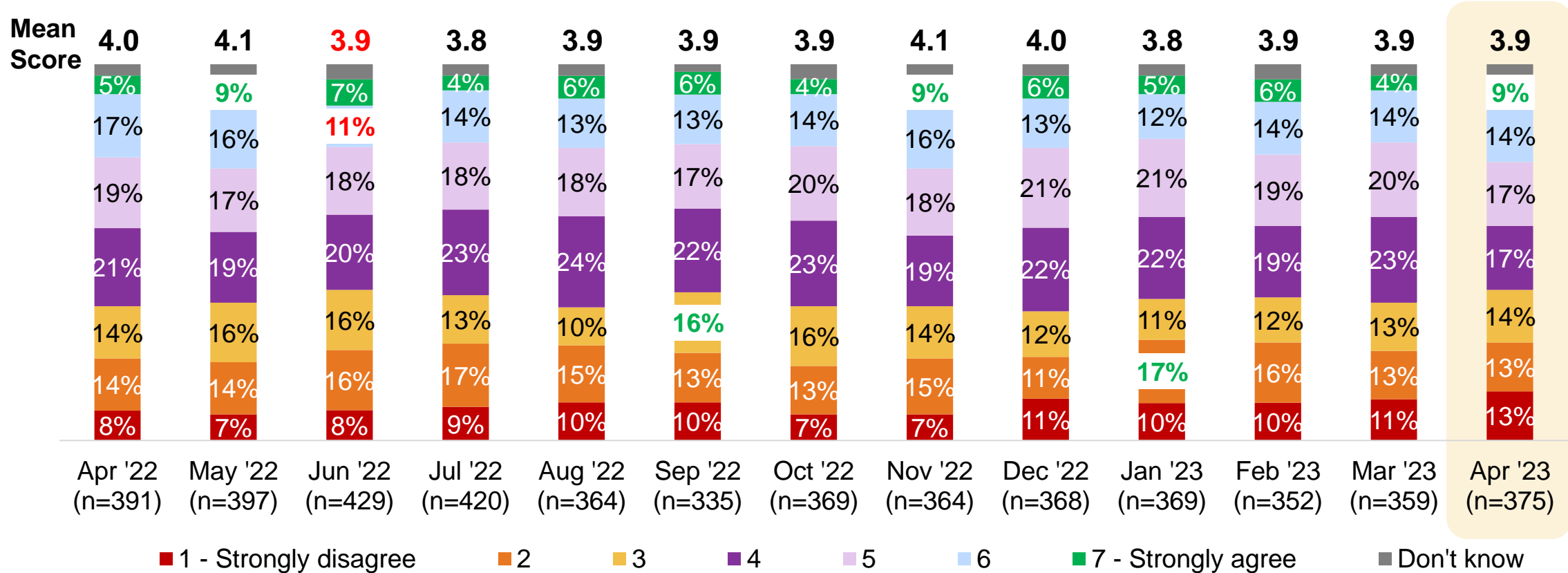
Green / red indicates significantly higher / lower than previous month

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

Base: Those who live near or regularly visit this place

# There has been a significant increase in people who strongly agree that their Protected Natural Area is *damaged by visitors*.

“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?

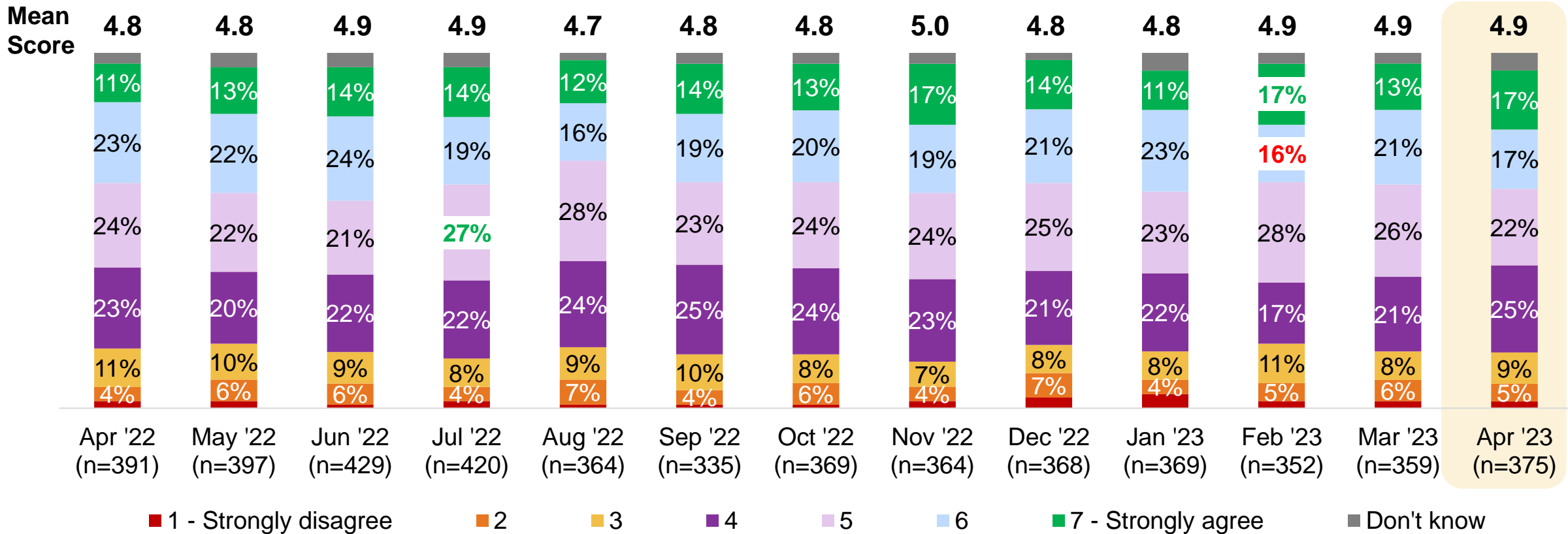
Base: Those who live near or regularly visit this place



# Agreement that PNA visitors help ensure the areas they visit are protected and improved remained 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”



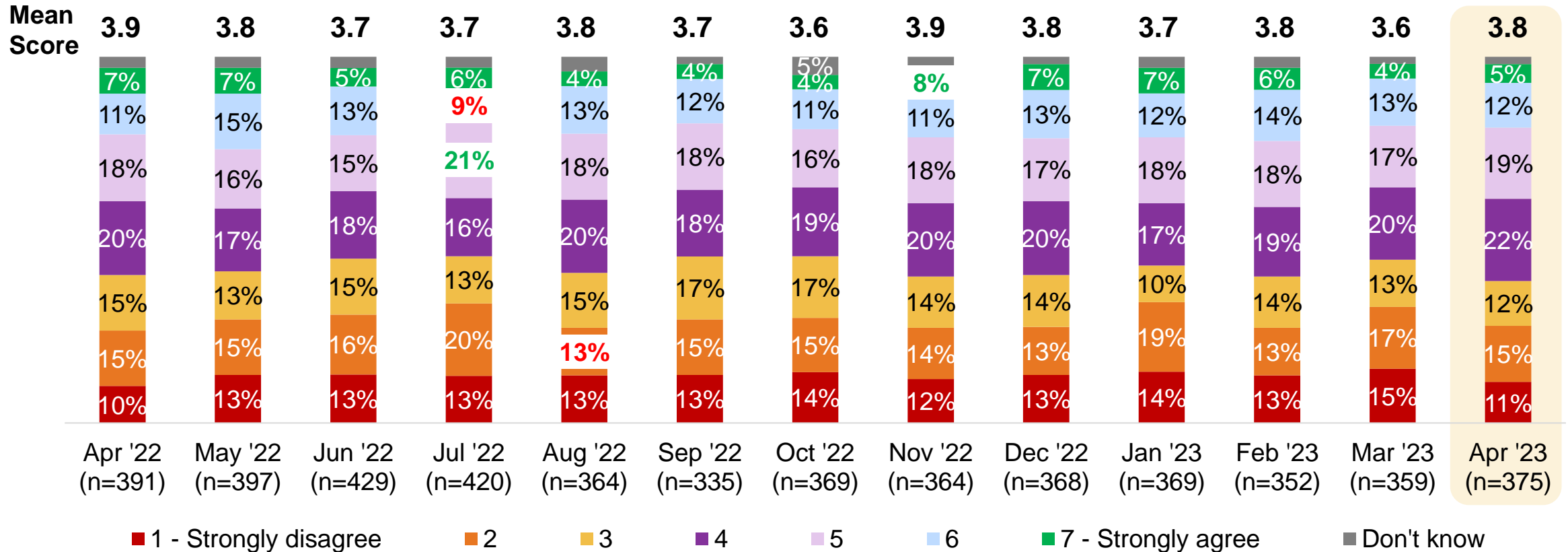
Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place



# Agreement that *visitors affect the attractiveness of a Protected Natural Area* has recovered following a decline last month, with fewer people giving a score of 1 or 2.

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



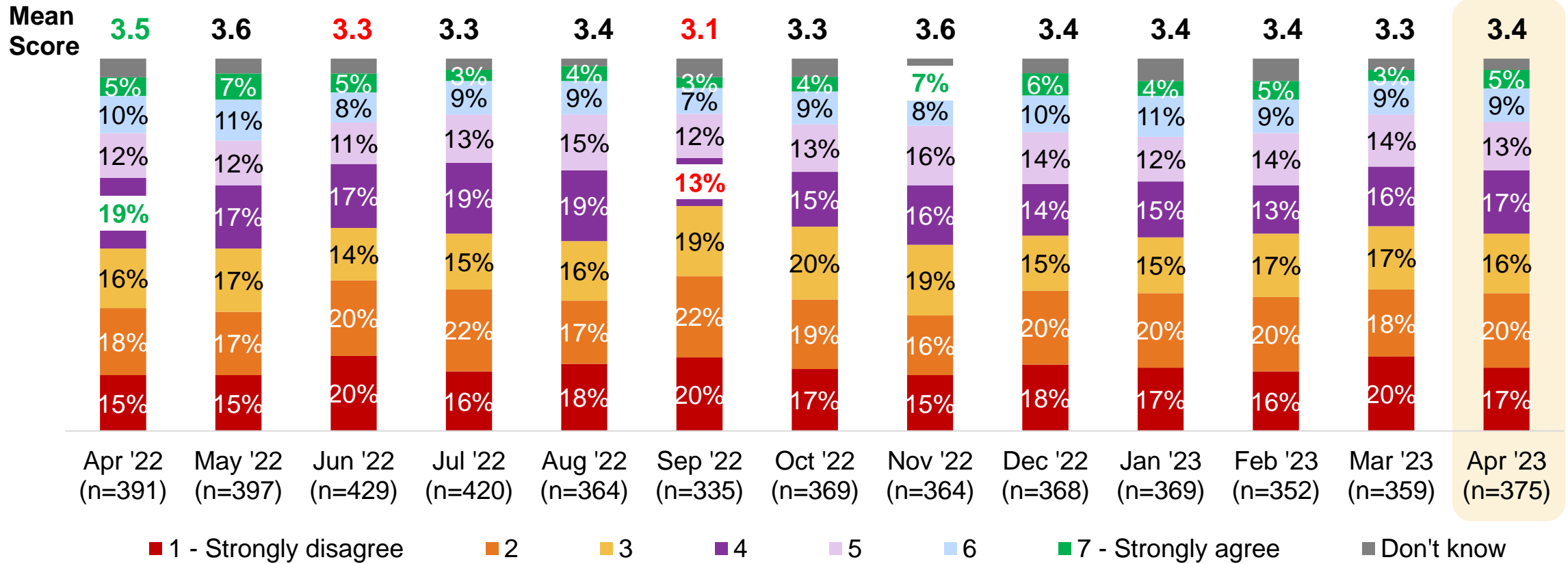
Green / red indicates significantly higher / lower than previous month

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

Base: Those who live near or regularly visit this place

# Agreement that *visitors weaken local traditions & cultures* remains unchanged.

“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?

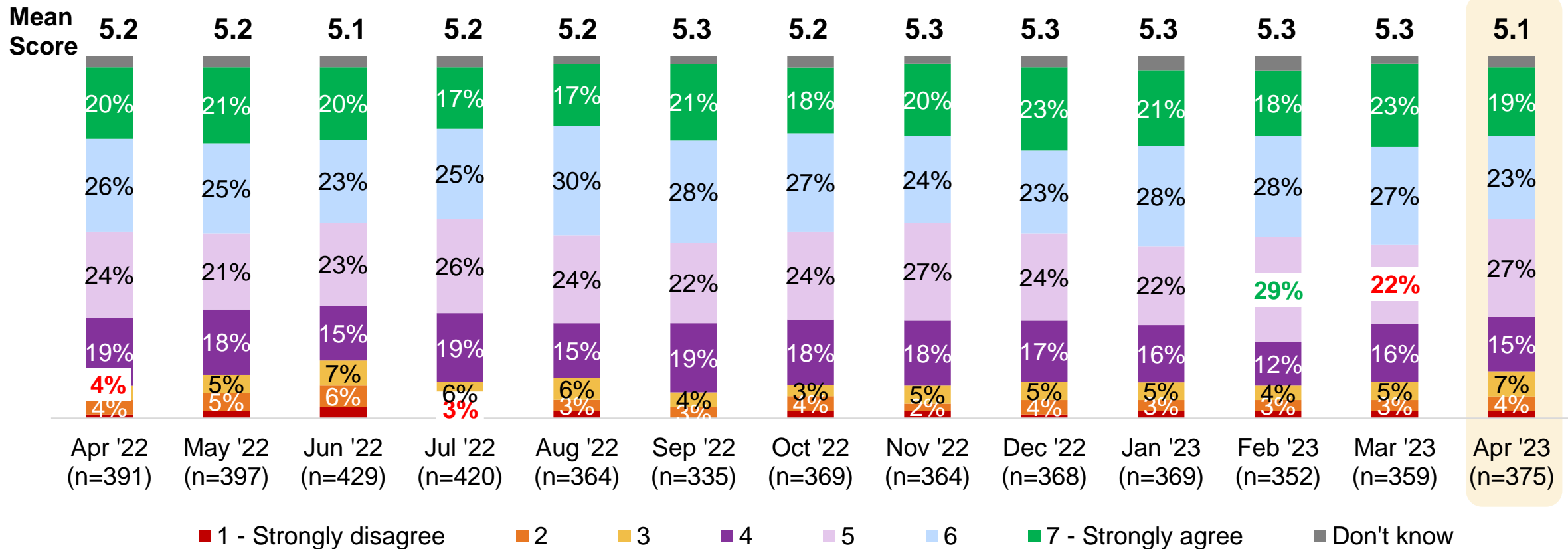
Base: Those who live near or regularly visit this place

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



Compared to last month, more people were neutral (rating of 5) in believing that *PNA visitors improve the local economy*.

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



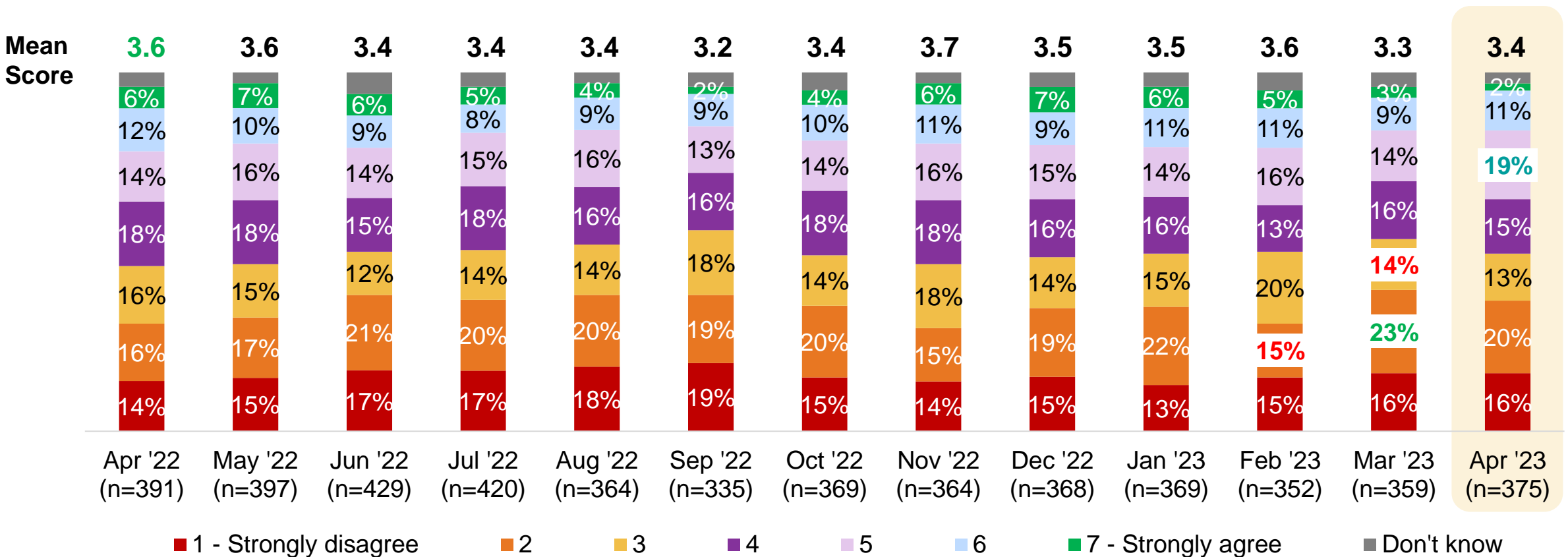
Green / red indicates significantly higher / lower than previous month

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

Base: Those who live near or regularly visit this place

The number of people agreeing that *visitors add unwanted financial burdens to local communities* remained stable with last month, though lower than a year ago.

“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

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



People are more likely to see positive effects for *heritage places* and negative effects for *river / lake*, *back country* and *beach / coast* communities. Impressions are neutral for *bush / forest* communities.

		Mean*					
		Total	 Beach / Coast	 River / Lakes	 Bush / Forest	 Back-Country	 Heritage Place
		n=	2,655	874	1,512	815	1,001
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	4.9	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> (higher numbers are better)	5.0	4.9	5.0	4.8	5.0	5.2
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> (lower numbers are better)	3.6	3.7	3.9	3.4	3.8	3.6

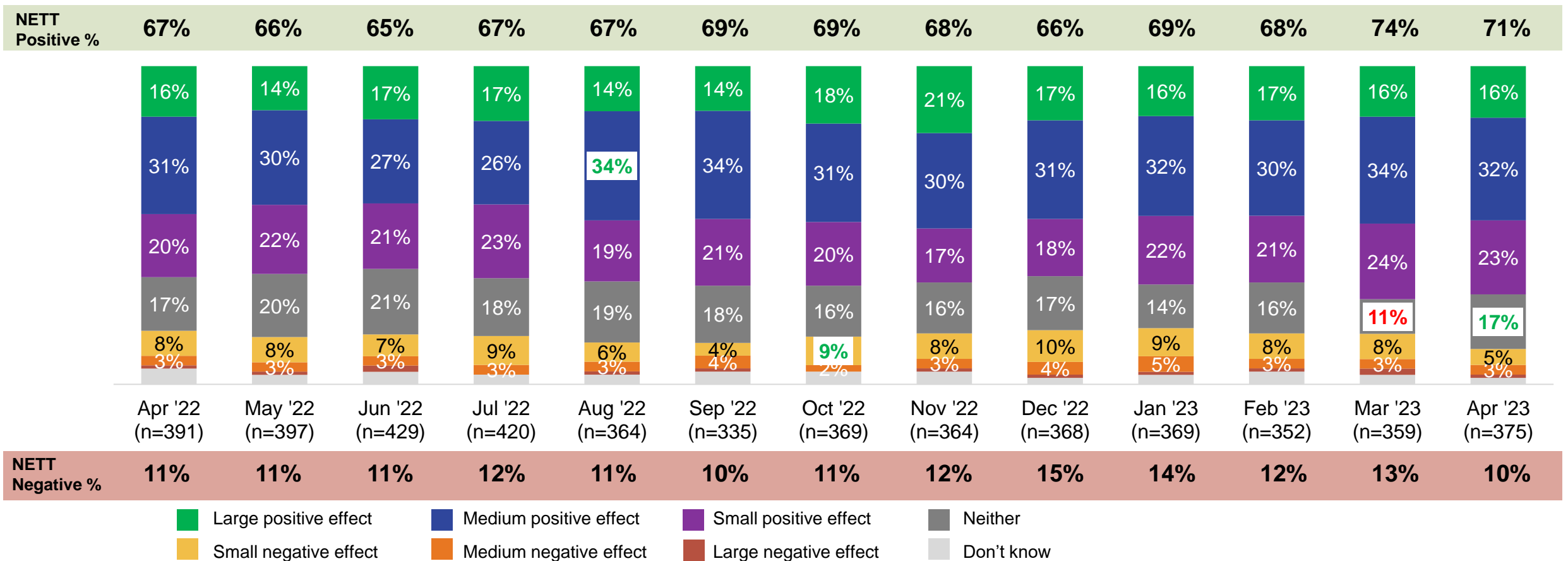
Green / red indicates significantly higher / lower than total

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.

# Compared to last month, significantly more residents & visitors to Protected Natural Areas do not see visitors as having either a positive or negative 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

**Jonathan Dodd**

Research Director

[jonathan.dodd@ipsos.com](mailto:jonathan.dodd@ipsos.com)

**Aidan Fenwick**

Senior Research Executive

[aidan.fenwick@ipsos.com](mailto:aidan.fenwick@ipsos.com)

**Samantha Grigg**

Research Executive

[samantha.grigg@ipsos.com](mailto:samantha.grigg@ipsos.com)



# 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).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg  
IPS:FP  
[www.ipsos.com](http://www.ipsos.com)

# 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**

