

DOC PUBLIC PULSE OF CONSERVATION

June 2023 Topline Report for May 2023 Activity

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23 June 2023



GAME CHANGERS



KEY FINDINGS – JUNE '23

(COVERING MAY '23 ACTIVITY)

- May visitation to Protected Natural Areas and Protected Heritage Places declined from last April. Compared to a year ago, visitation to Protected Natural Areas and Protected Heritage Places is also slightly lower. These decreases may well reflect the worse weather experienced over the last 6 months, and last year's higher than normal domestic activity while international travel remained affected by COVID-19.
 - These changes no doubt contributed to a decline in camping trips, with a possibly-related decline in people seeking specific information when planning their trips.
- Satisfaction with the overall experience at Protected Natural Areas remained stable this month but was slightly lower when compared to a year ago. We suspect that continued inclement weather may well be contributing to poorer experiences and DOC maintenance challenges.
- In contrast to PNAs, satisfaction with the overall experience at Protected Heritage Places was unchanged compared to a year ago, and this may reflect how 'built' destinations are typically less severely impacted by poor weather than natural environments.
 - Compared to last month, visitor satisfaction of the condition and capacity of car parks within Protected Natural Areas and Protected Heritage Places increased. This may simply reflect lower visitation numbers.
- At 30, the NPS for Protected Natural Areas remains lower than a year ago when it was 35.
- Conversely, the NPS for Protected Heritage Places is higher compared to a year ago. Protected Heritage Places NPS is 26. A year ago this was 21.
- In May, significantly more people stated that they did not recall seeing or hearing any aspects of the Department of Conservation in the past 4 weeks.



SUMMARY


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

BACKGROUND & METHODOLOGY




Sample size

1,000




Fieldwork dates
June 6-15, 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

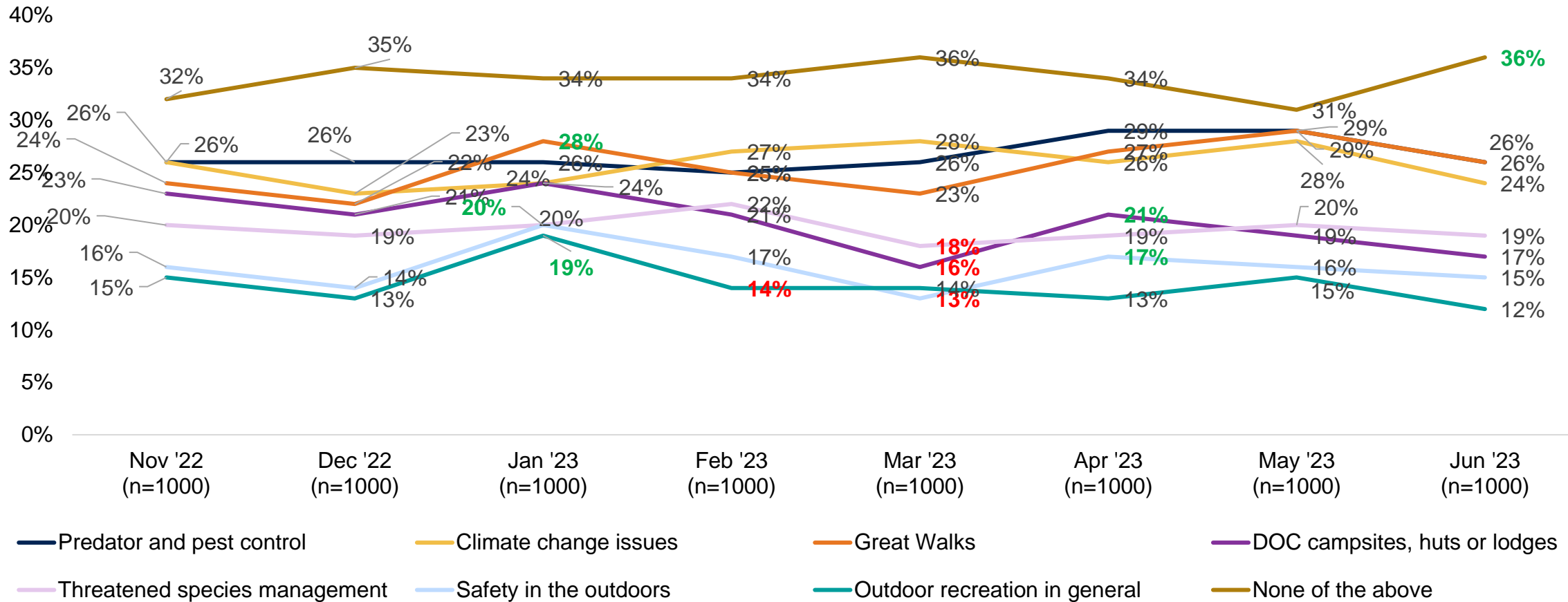
Nov 21	5–12 November, 2021
Dec 21	3–9 December, 2021
Jan 22	6–15 January, 2022
Feb 22	5–15 February, 2022
Mar 22	3–10 March, 2022
Apr 22	1–11 April, 2022
May 22	5–16 May, 2022
Jun 22	3–11 June, 2022
Jul 22	4–13 July, 2022
Aug 22	15-24 August, 2022
Sep 22	7-17 September, 2022
Oct 22	5-17 October, 2022
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
May 23	8-17 May, 2023

DOC MEDIA PROFILE



In May, significantly fewer people recalled seeing or hearing about DOC

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

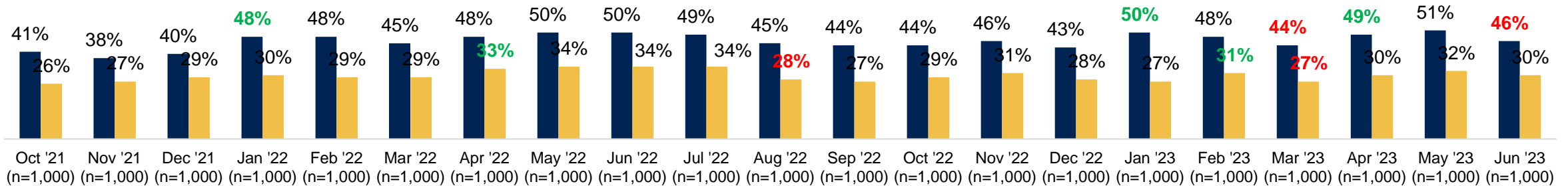


Green / red indicates significantly higher / lower than previous month

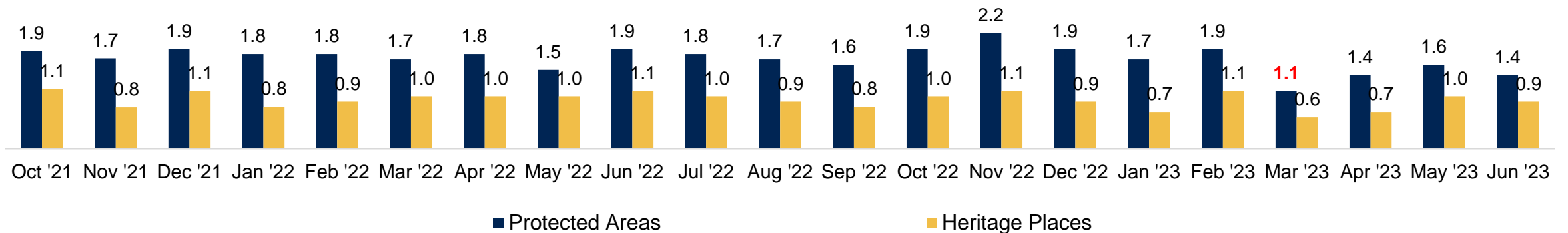
Q50: Which, if any, of the following aspects of the Department of Conservation have you seen, read, or heard about in the past 4 weeks? *Note: Top-8 responses are shown.

VISITATION FREQUENCY

Visitation to Protected Natural Areas and Heritage Places for the May period declined, most likely reflecting the recent poor weather. Year-on-year visitation is also down, possibly reflecting the higher 2022 domestic travel in the shadow of the Covid-19 travel restrictions.



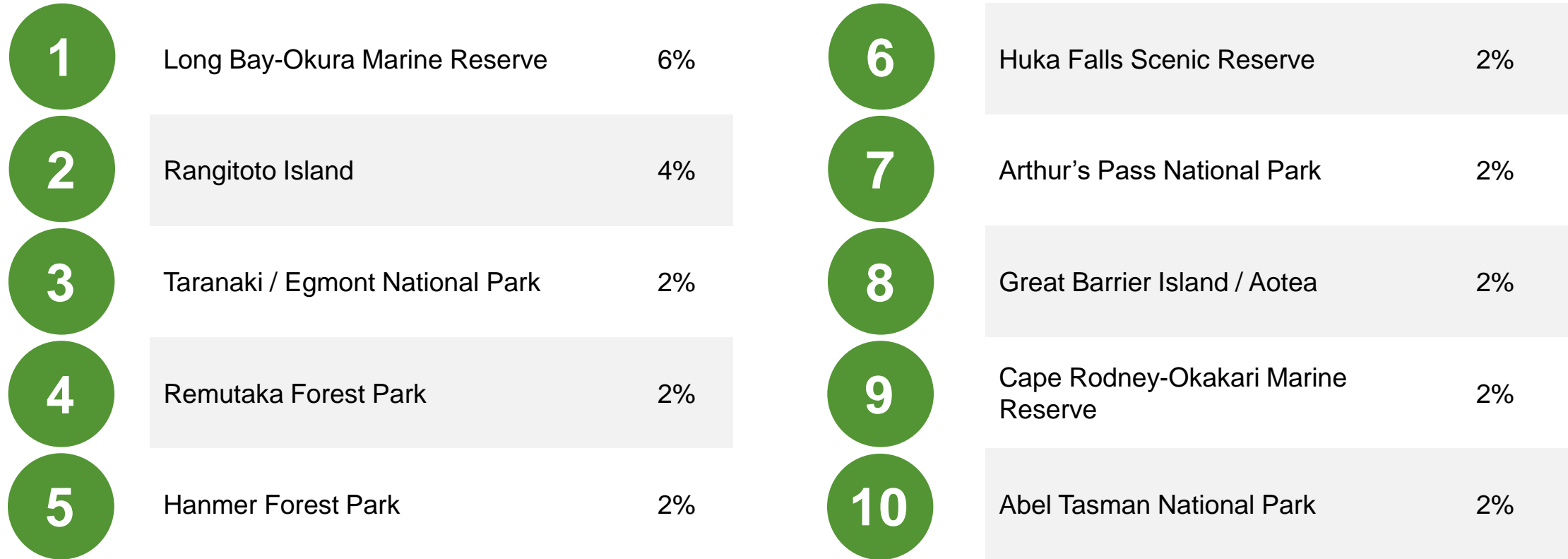
Average number of visits in the last month*



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.

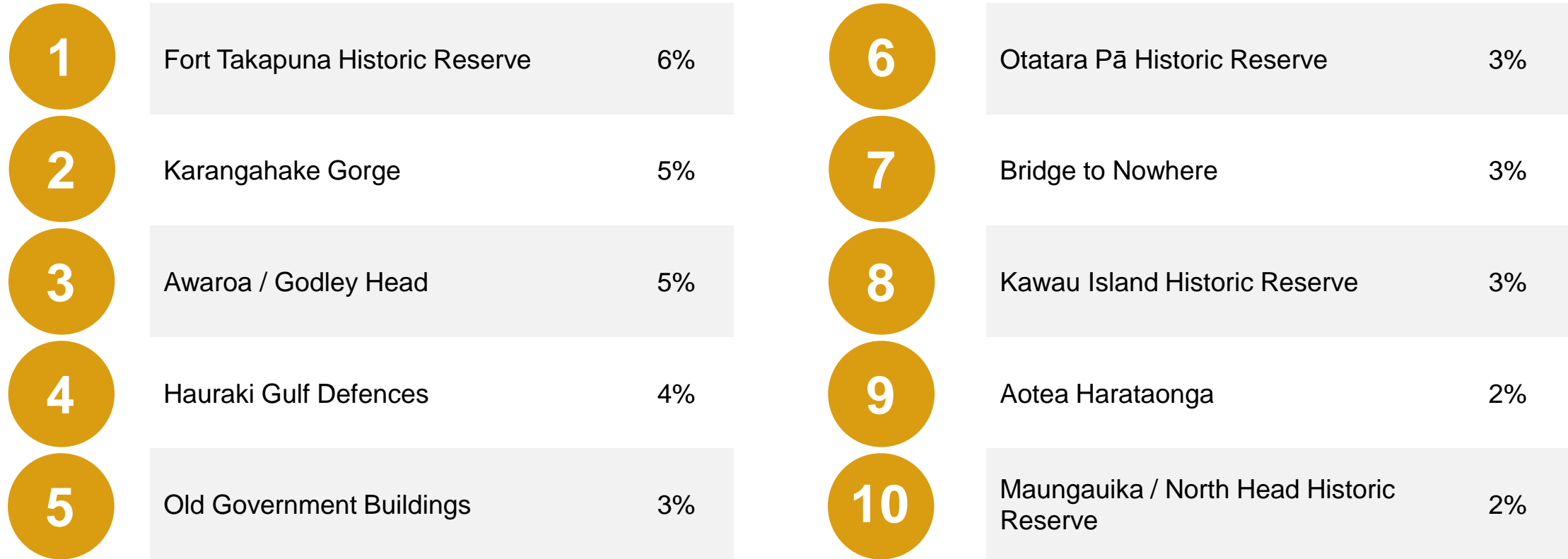
TOP-10 PROTECTED NATURAL AREAS VISITED: JUN 2021–JUN 2023.



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=11,330)

TOP-10 PROTECTED HERITAGE PLACES VISITED: JUN 2021–JUN 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=7,419)

In the May period significantly fewer people were going *camping* when visiting Protected Natural Areas, most likely reflecting the poorer weather.

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	Jun '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	460
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%	44%
Sightseeing	30%	29%	32%	29%	29%	24%	31%	27%	30%	30%	32%	31%	30%	35%	34%	28%	31%	27%	32%	34%	28%	35%	30%	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%	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%	26%	25%
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%	24%
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%	22%
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%	21%
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%	14%
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%	11%
Camping	12%	12%	14%	14%	14%	12%	16%	14%	13%	12%	11%	11%	11%	11%	8%	10%	11%	11%	12%	13%	8%	10%	15%	9%
Boating/sailing	8%	10%	5%	8%	8%	8%	10%	10%	10%	9%	9%	8%	8%	7%	6%	9%	9%	7%	8%	9%	7%	7%	8%	7%

Green / red indicates significantly higher / lower than previous month

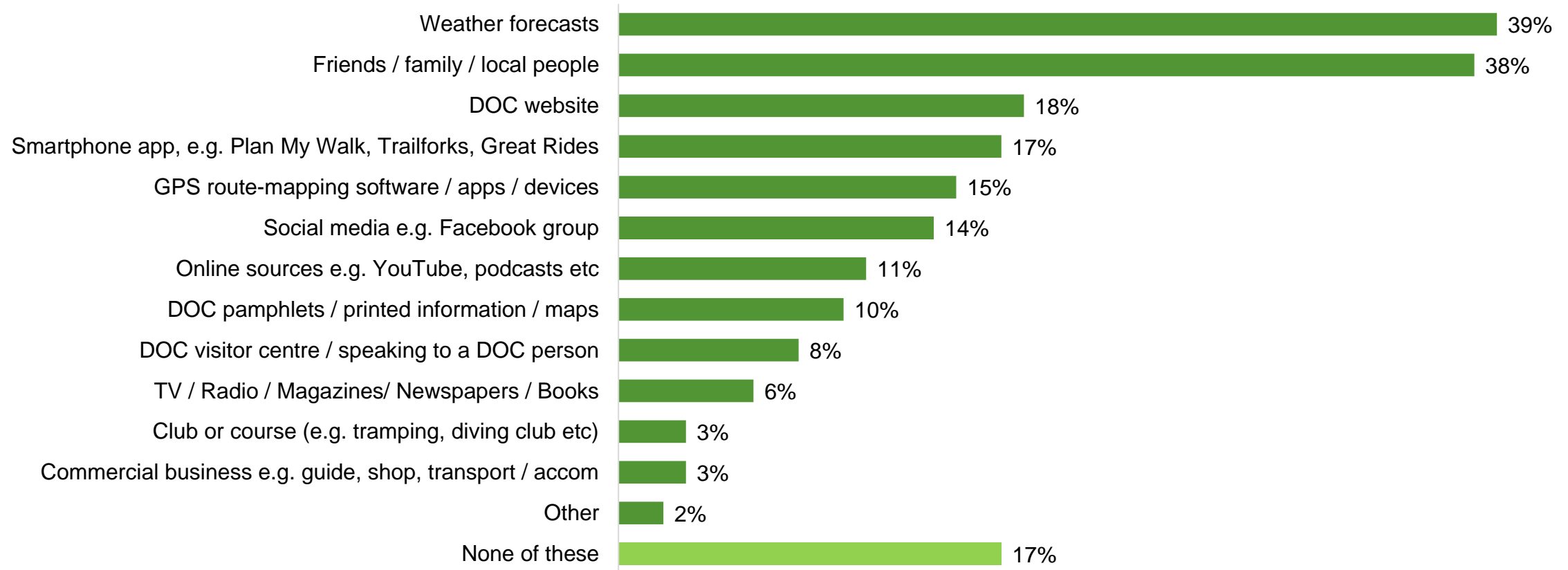
Q12: Thinking about your most recent visit to <LOCATION SELECTED IN Q8>, which of the following activities did you engage in?

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. With only 18% using the DOC website, many may be missing key information about their destination.

Sources of Information used for Planning – June 2023

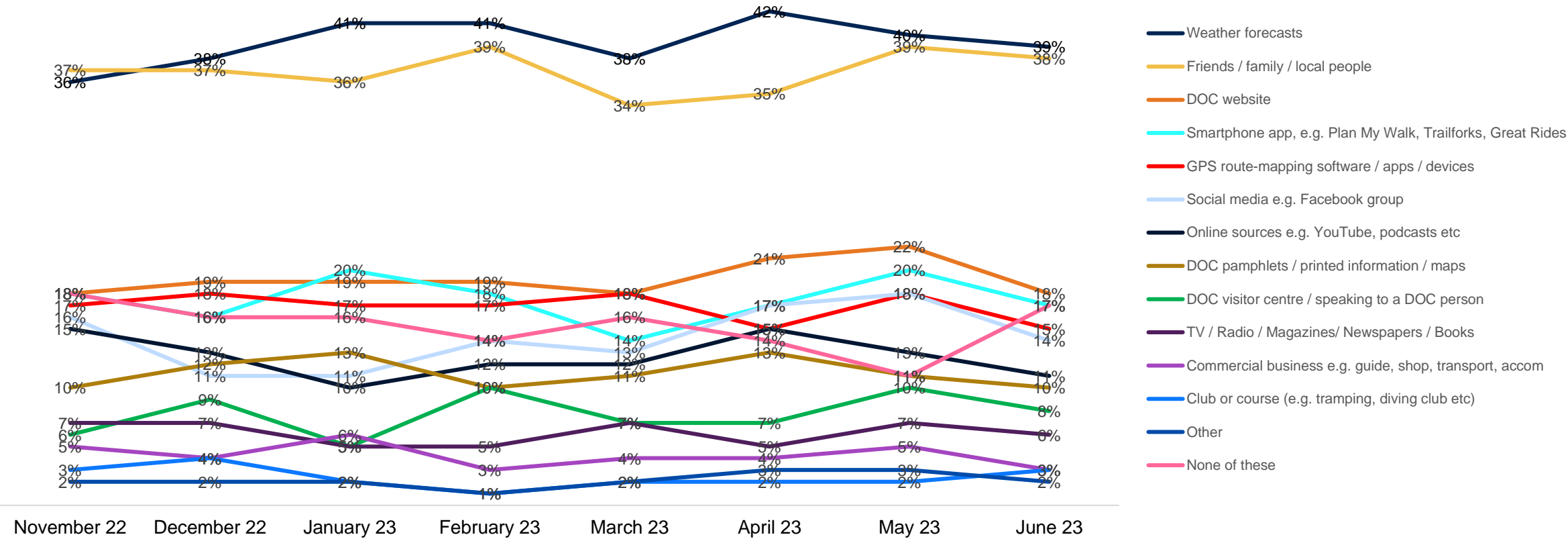


Q12b: Thinking about your most recent visit to <LOCATION SELECTED IN Q8>, what, if any information sources did you use to help plan for a successful trip?

Base: Base: Those who visited a Protected Natural Area in the last month (n=460)

As the nature of a trip will influence the information sought, the decline in camping trips this month may have contributed to the decrease in DOC website usage and the increase in those using no additional information sources.

Sources of Information used for Planning – June 2023

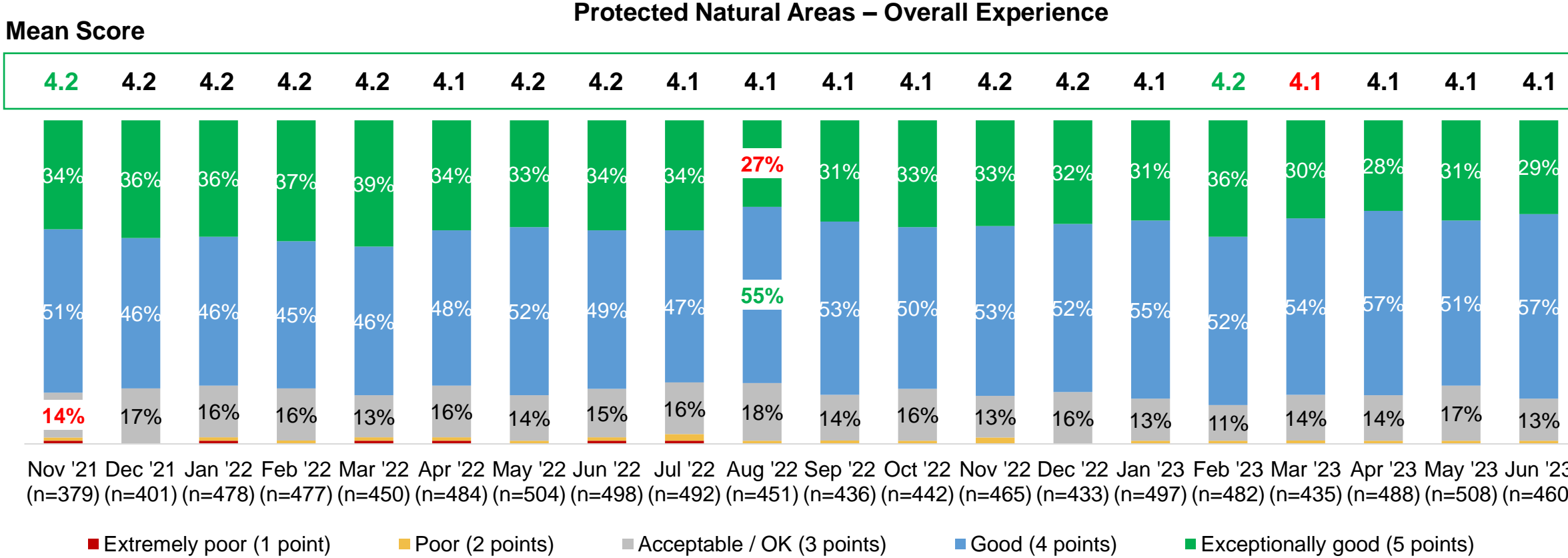


Q12b: Thinking about your most recent visit to <LOCATION SELECTED IN Q8>, what, if any information sources did you use to help plan for a successful trip?

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



Visitors' satisfaction with the *overall experience* at Protected Natural Areas remained stable compared to the previous month, but compared to a year ago, this is slightly lower.

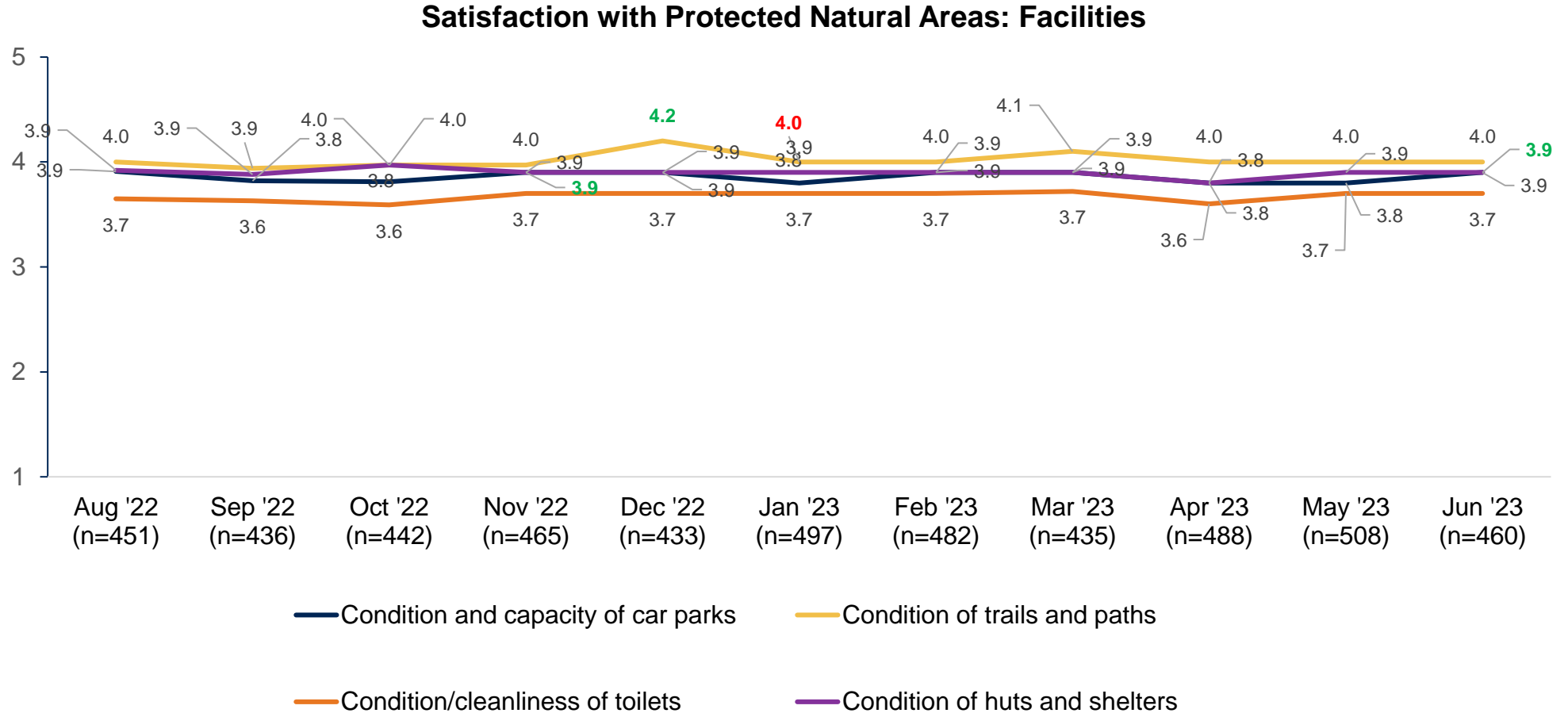
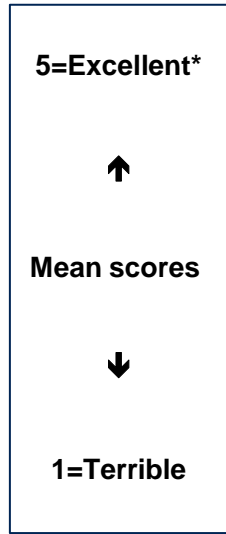


Green / red indicates significantly higher / lower than previous month

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



Compared to last month, visitors' satisfaction of the *condition and capacity of car parks* within Protected Natural Areas increased. This could reflect lower visitation numbers.



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

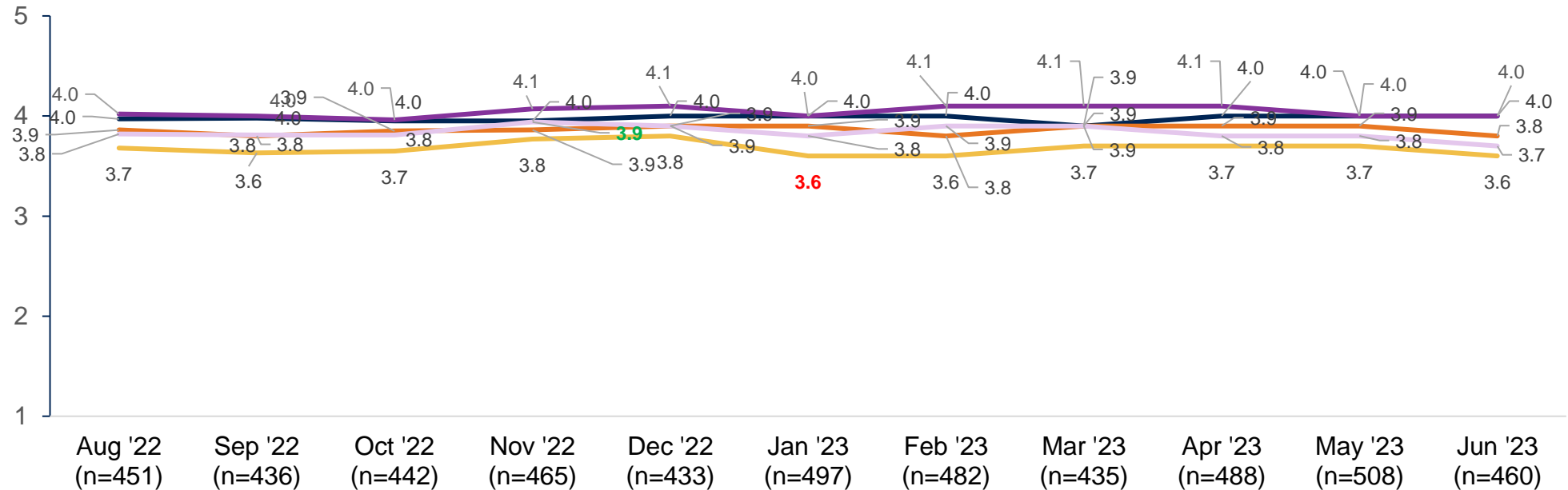
5=Excellent*

↑

Mean scores

↓

1=Terrible

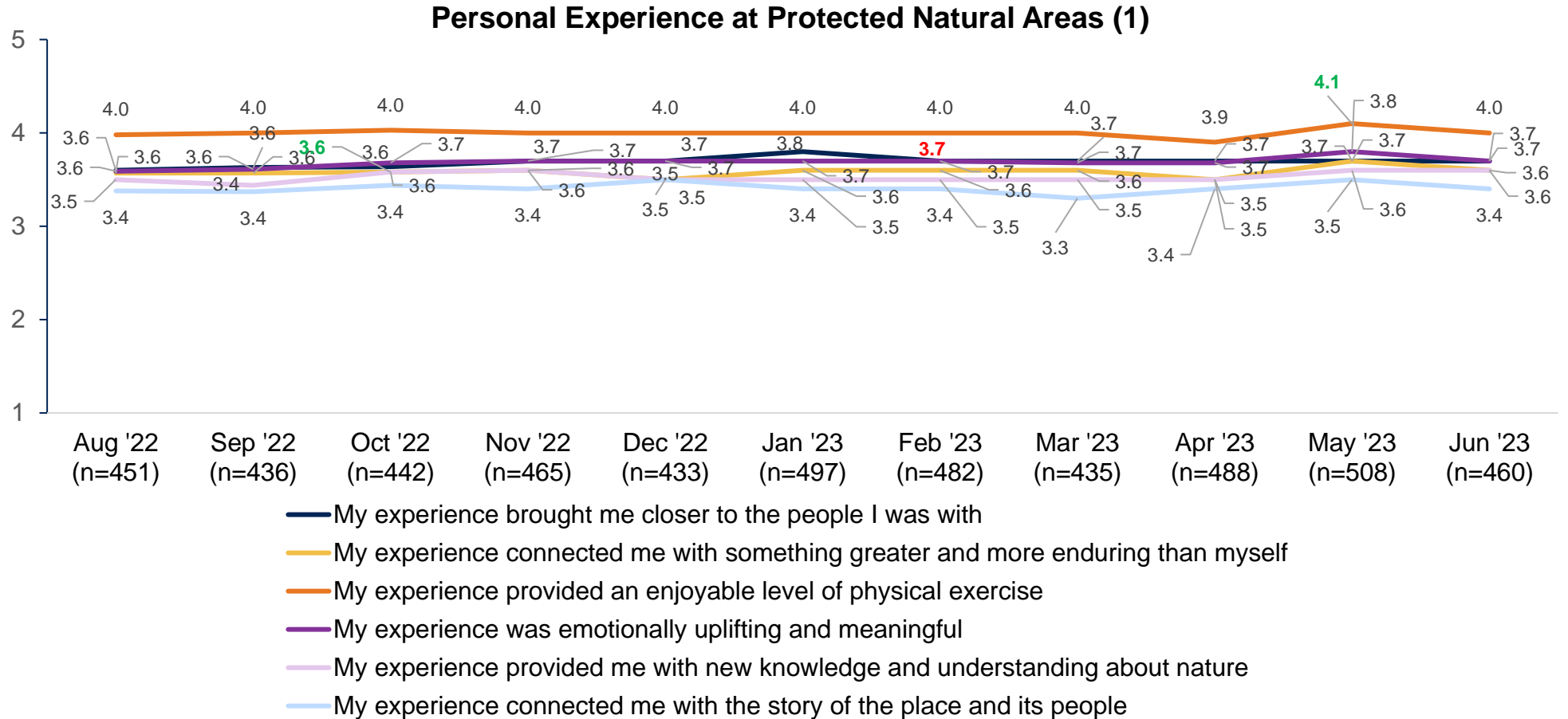
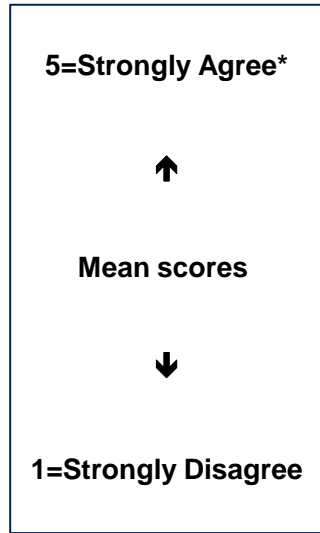


- Safety information, directional signs, barriers, bridges, etc.
- Information and stories about nature, Māori culture, local history, etc.
- Overall suitability of facilities provided at the place - car parks, paths, toilets, huts, etc.
- Overall standard of maintenance/presentation of the place
- Management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

Visitors' ratings of PNA *Personal Experience* remained stable.



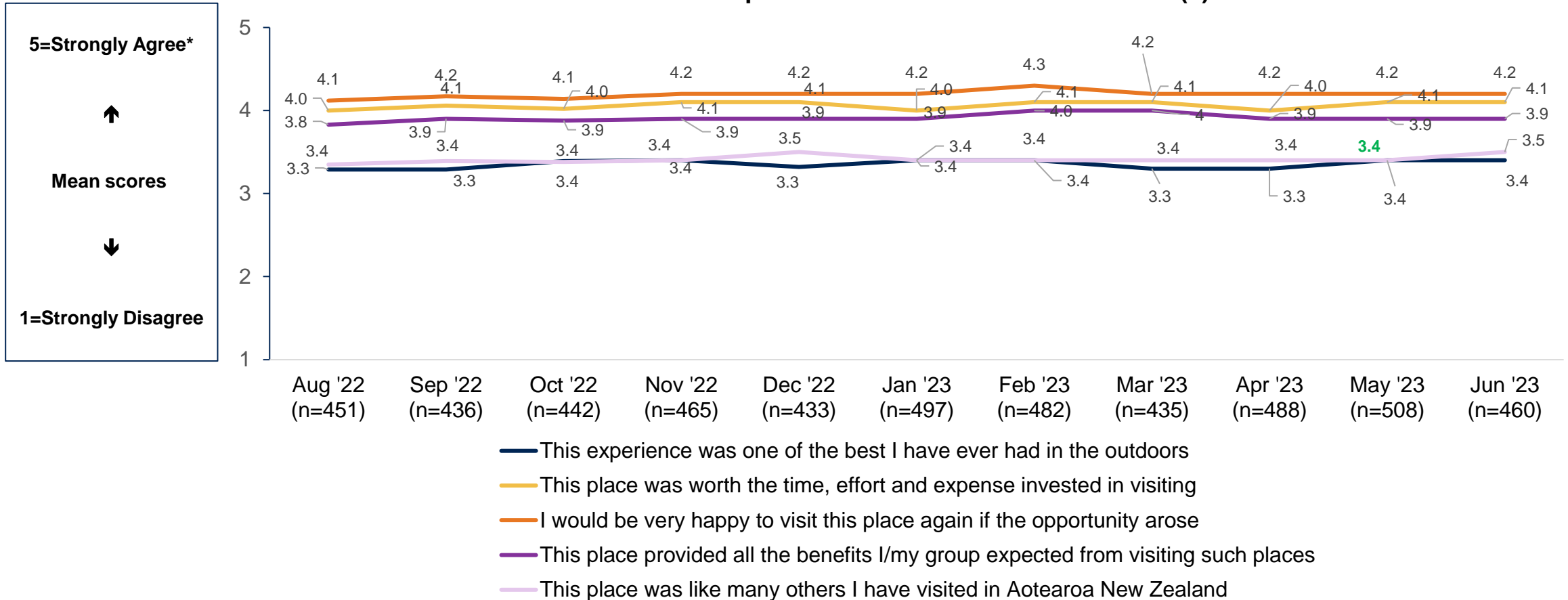
Green / red indicates significantly higher / lower than previous month

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.

Visitors' ratings of PNA *Personal Experience* remained stable.

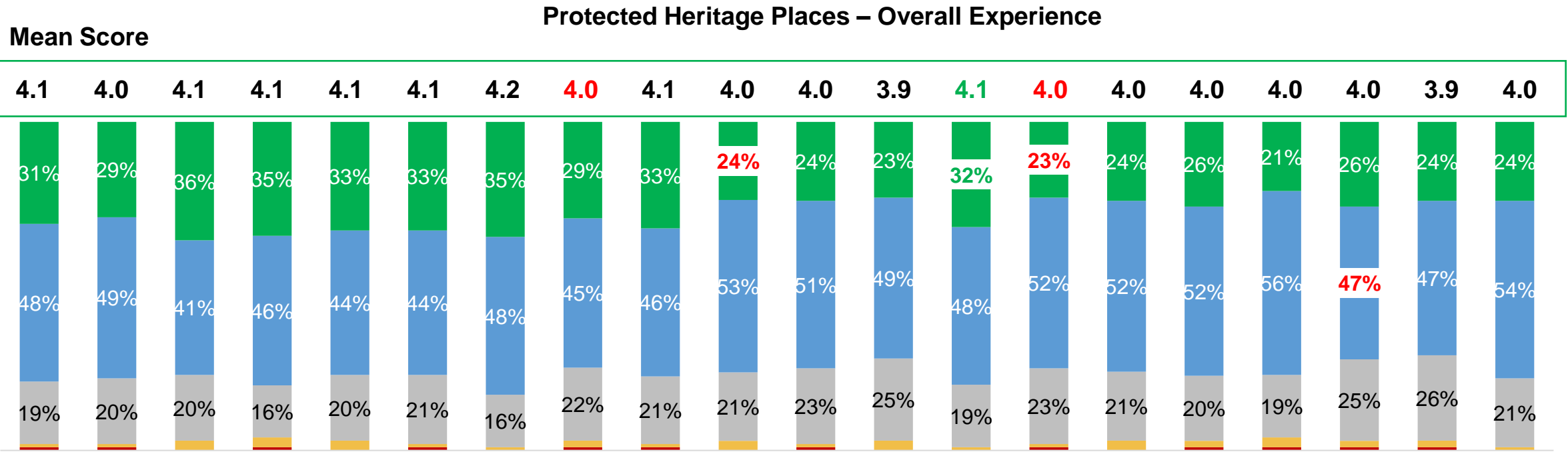
Personal Experience at Protected Natural Areas (2)



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 PHP Overall Experience are stable compared to a year ago.



Green / red indicates significantly higher / lower than previous month

Nov '21 (n=273) Dec '21 (n=288) Jan '22 (n=300) Feb '22 (n=292) Mar '22 (n=291) Apr '22 (n=333) May '22 (n=340) Jun '22 (n=340) Jul '22 (n=338) Aug '22 (n=278) Sep '22 (n=274) Oct '22 (n=291) Nov '22 (n=310) Dec '22 (n=284) Jan '23 (n=270) Feb '23 (n=312) Mar '23 (n=271) Apr '23 (n=305) May '23 (n=319) Jun '23 (n=295)

■ Extremely poor (1 point)
 ■ Poor (2 points)
 ■ Acceptably / OK (3 points)
 ■ Good (4 points)
 ■ Exceptionally good (5 points)

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

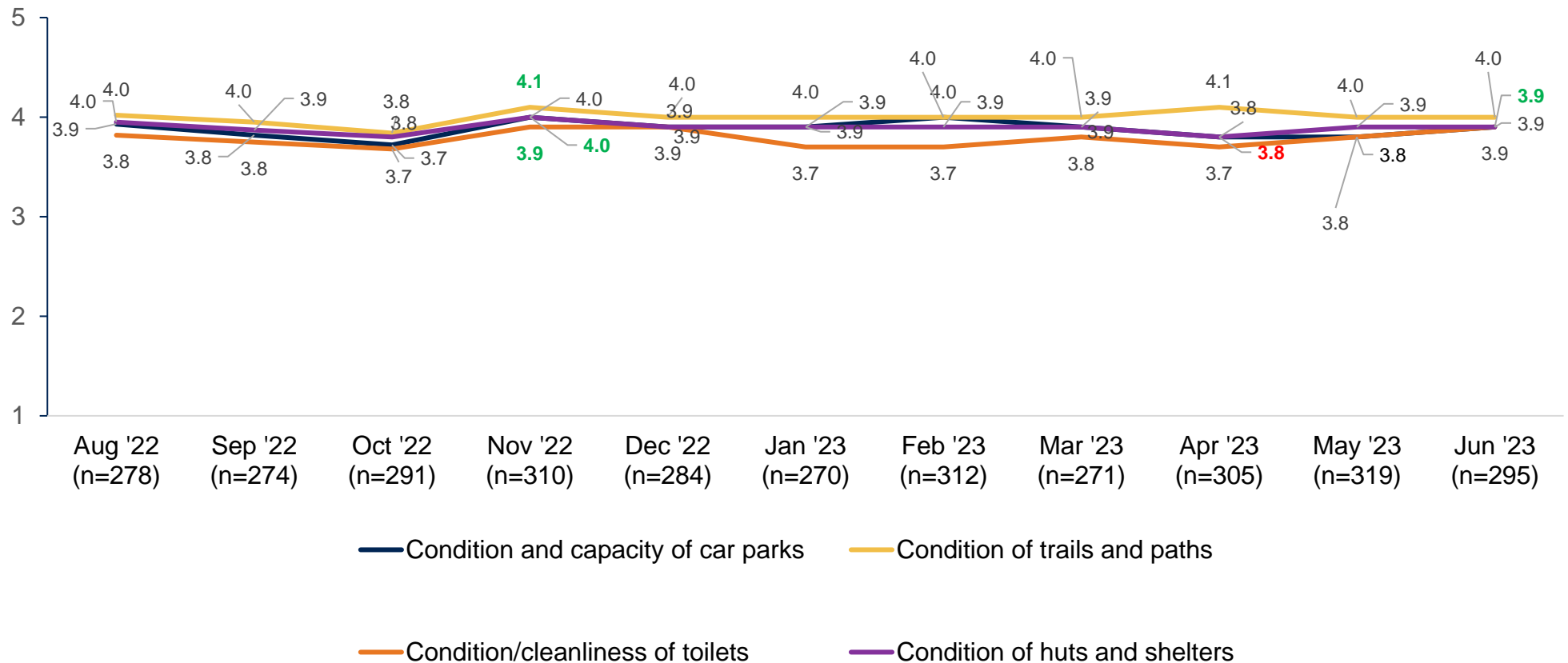
20 – © Ipsos | DOC Public Pulse of Conservation – Monthly Topline Report



Compared to last month, visitors' satisfaction of the *condition and capacity of car parks* within Protected Heritage Places increased. This could reflect lower visitation numbers.

Satisfaction with Protected Heritage Places: Facilities

5=Excellent*
 ↑
 Mean scores
 ↓
 1=Terrible



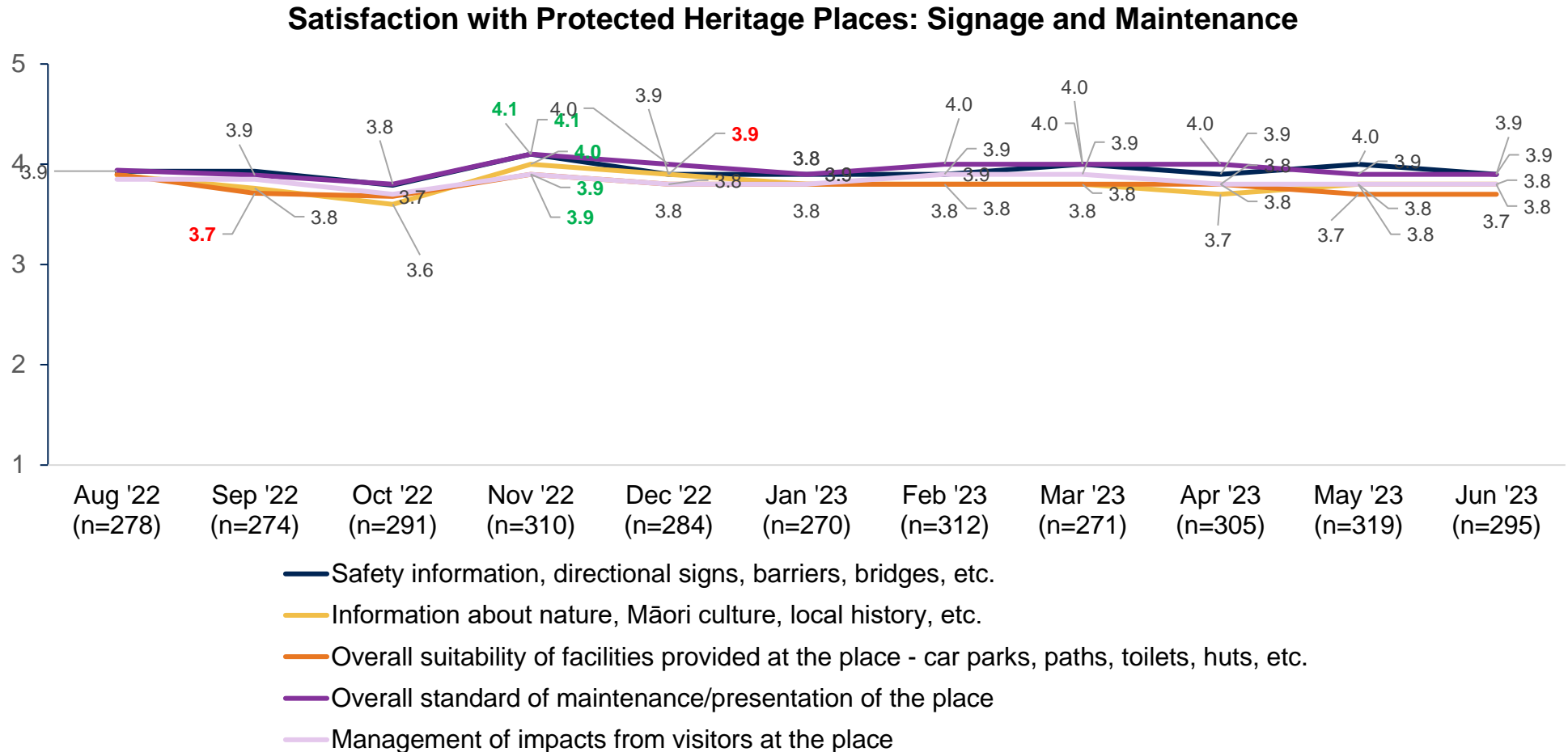
Green / red indicates significantly higher / lower than previous month

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

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

Satisfaction with PHP signage and maintenance remained high.

5=Excellent*
 ↑
 Mean scores
 ↓
 1=Terrible



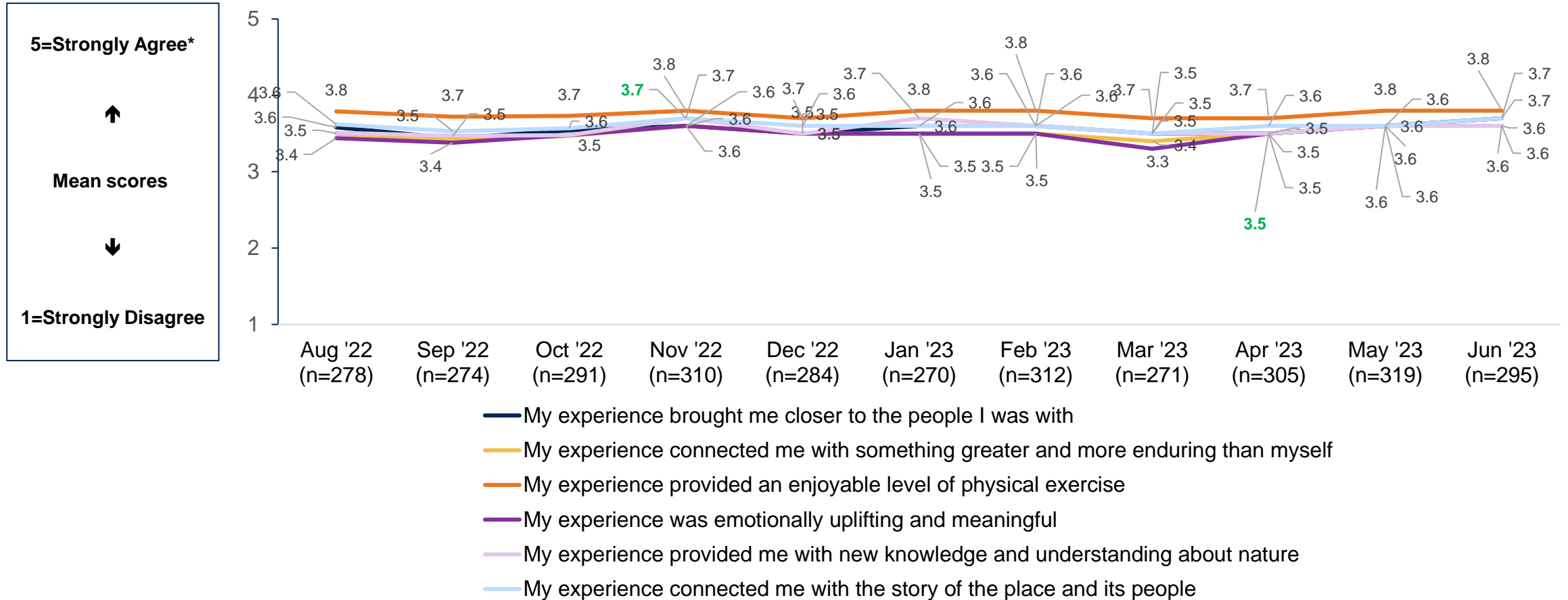
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Q26a: Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how would you rate the following aspects listed below?

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.

Visitors' ratings of PHP *Personal Experience* remained stable.

Personal Experience at Protected Heritage Places (1)



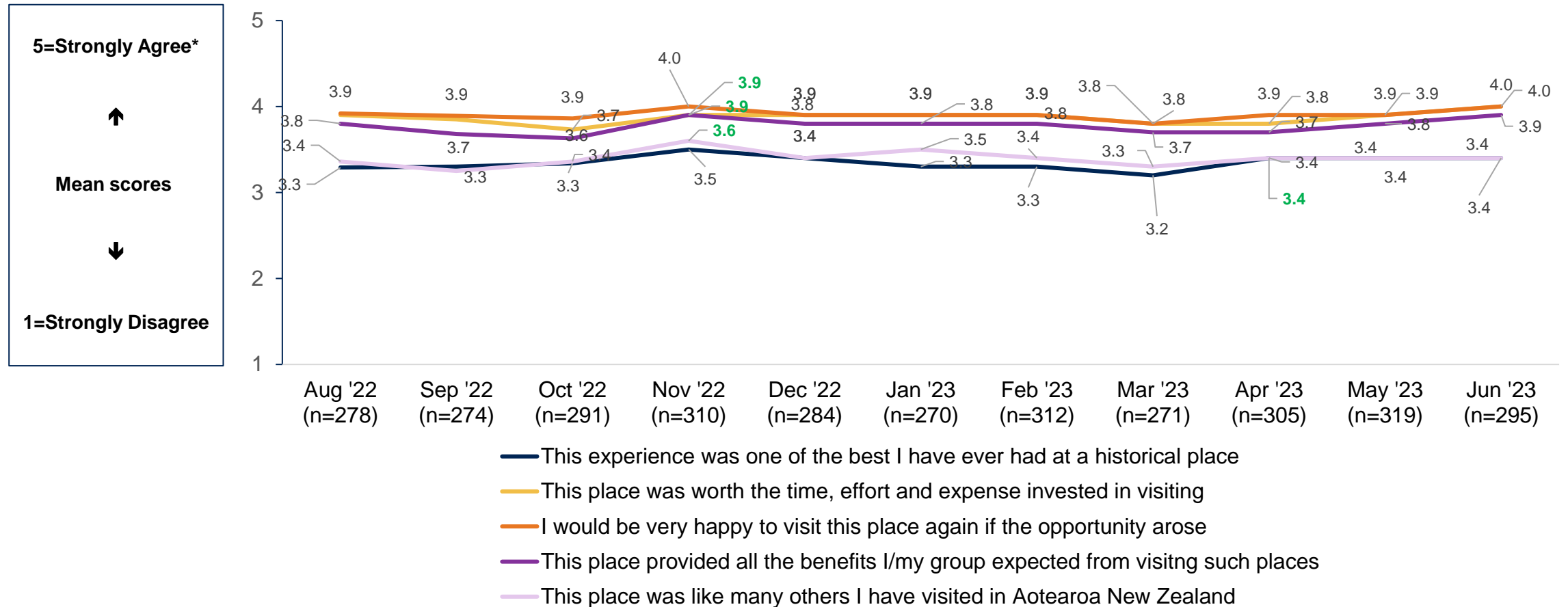
Green / red indicates significantly higher / lower than previous month

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.

Visitors' ratings of PHP *Personal Experience* remained stable.

Personal Experience at Protected Heritage Places (2)



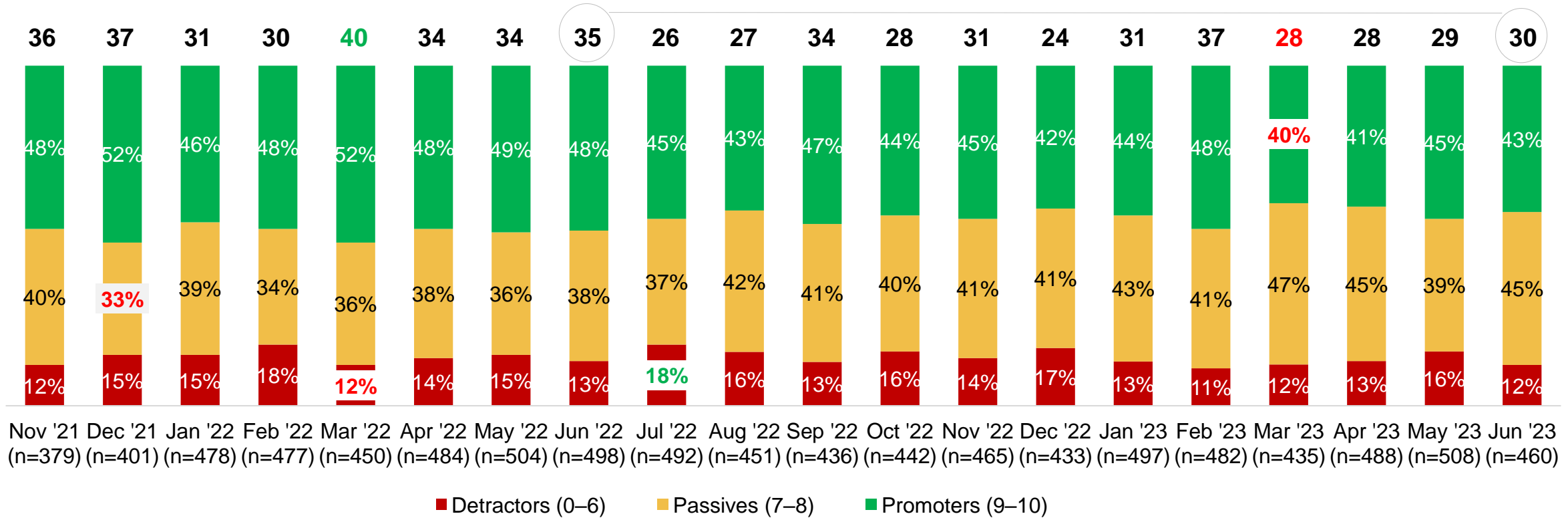
Q26b: Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how much do you agree or disagree with each of the statements below?

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

Protected Natural Areas – NPS



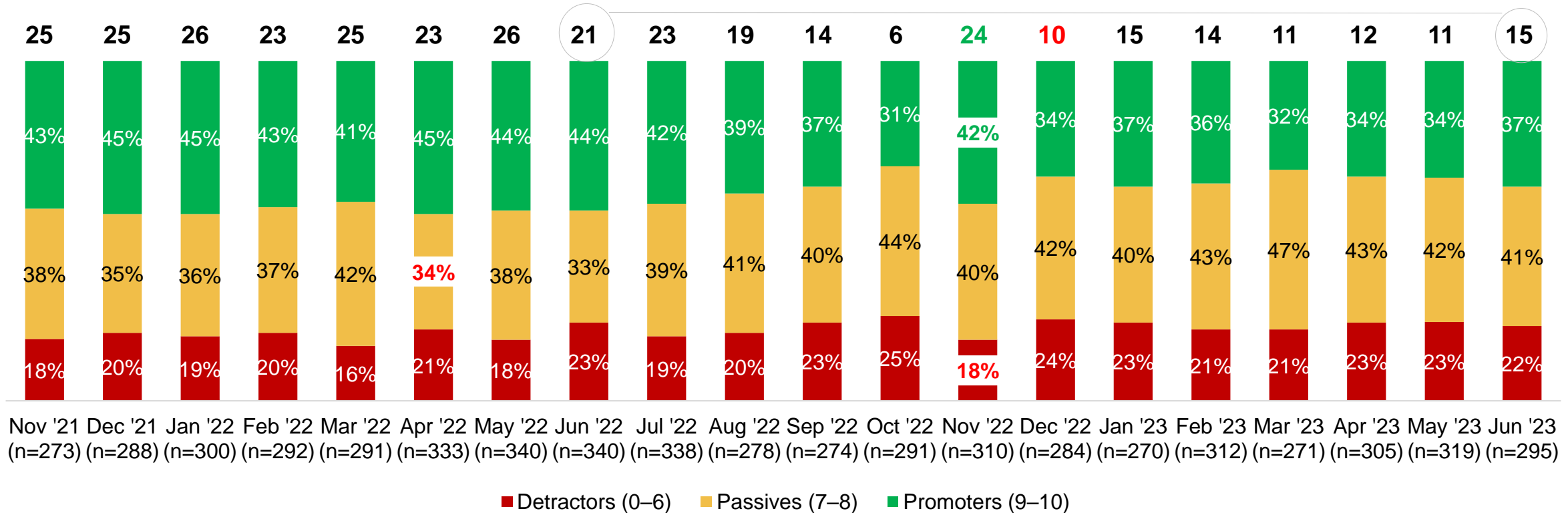
Green / red indicates significantly higher / lower than previous month

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 is lower compared to a year ago.

Protected Heritage Places – NPS



Green / red indicates significantly higher / lower than previous month

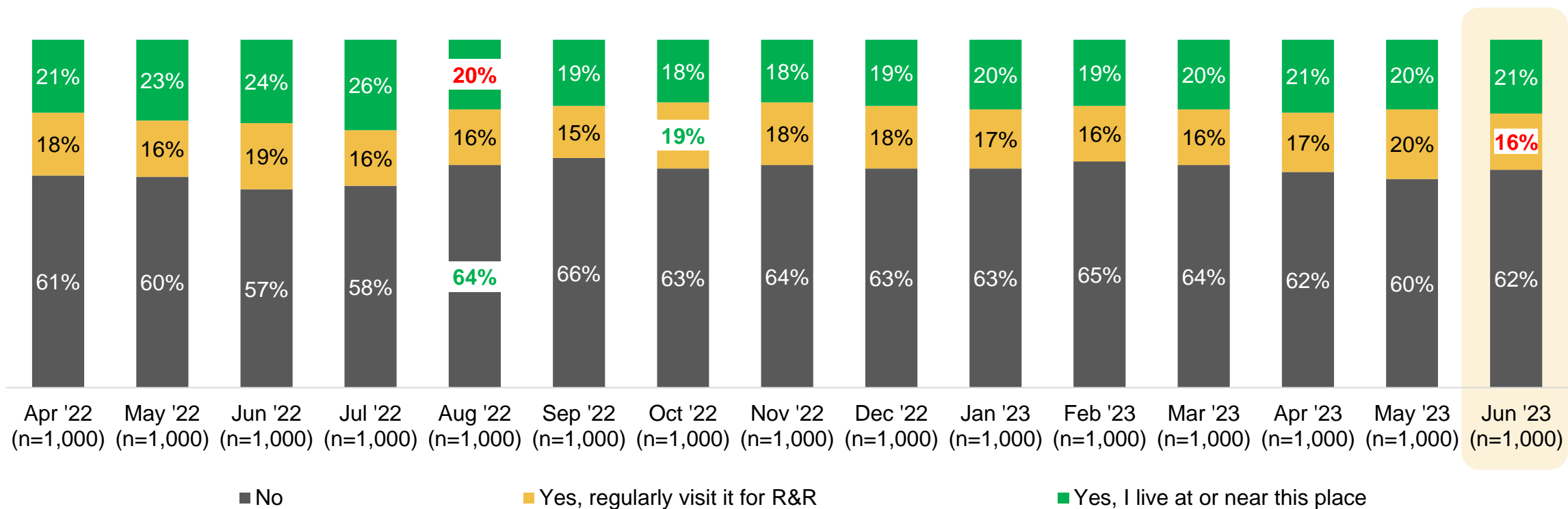
Q28: How LIKELY is it you would RECOMMEND <LOCATION SELECTED IN Q20> to your family or friends?

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

‘THRIVE’ MODULE

In the May period, the number of visitors who regularly visit a Protected Natural Area for rest and recovery has declined.

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



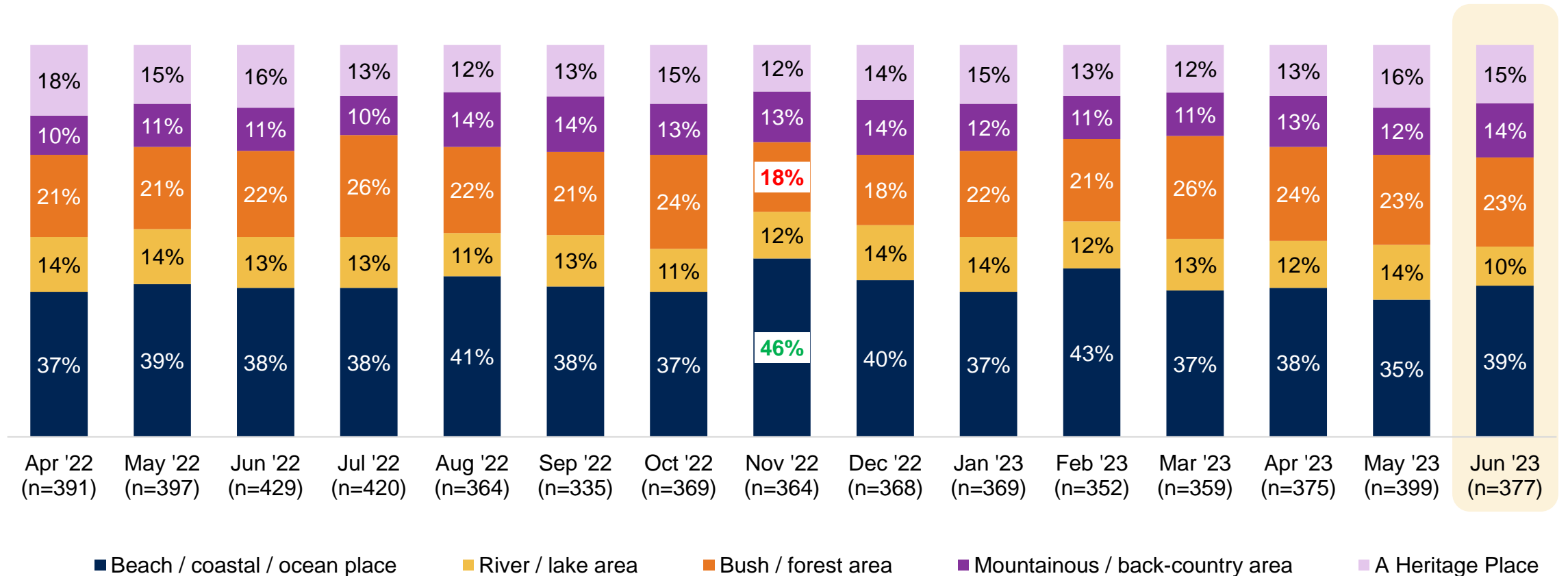
Green / red indicates significantly higher / lower than previous month

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?



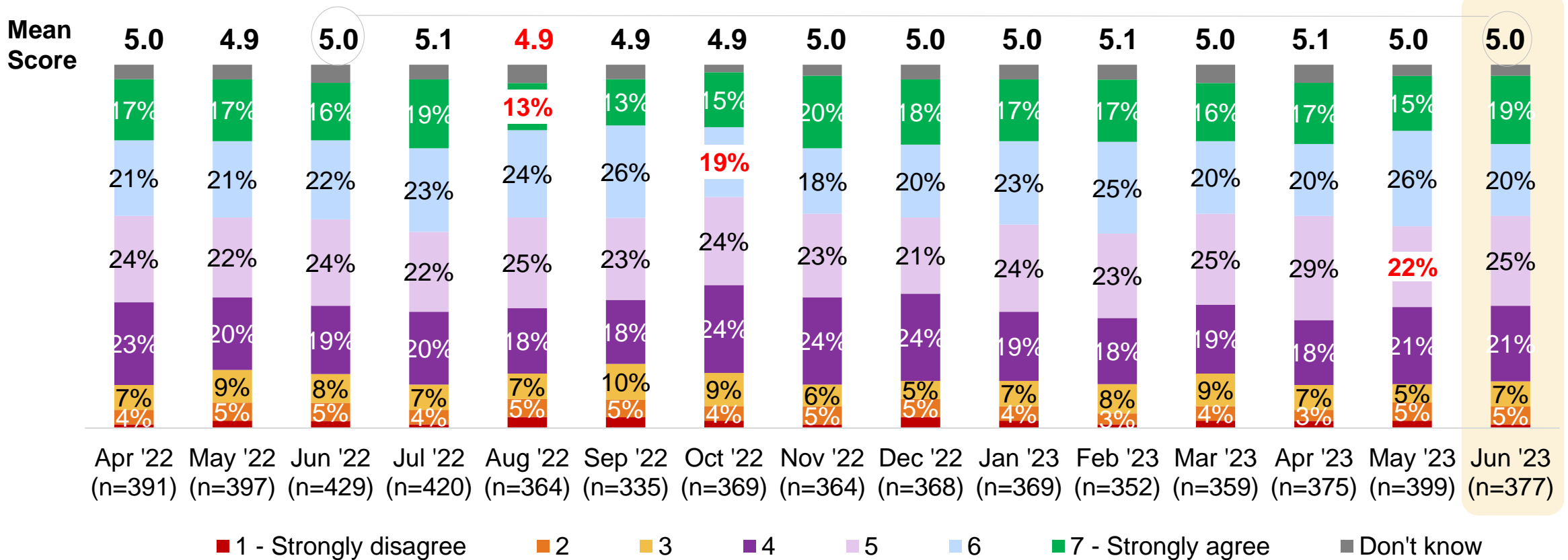
Green / red indicates significantly higher / lower than previous month

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* remained stable this month and is also stable with a year ago.

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



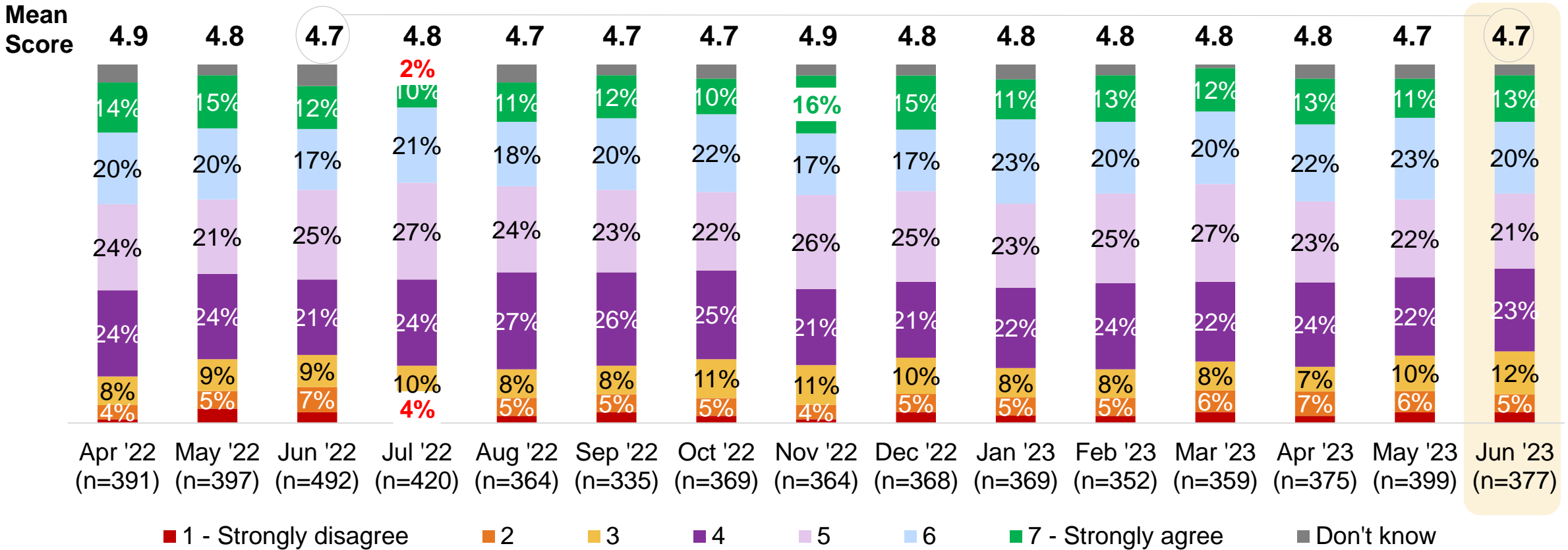
Green / red indicates significantly higher / lower than previous month

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* remained stable with last month and also compared to a year ago.

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



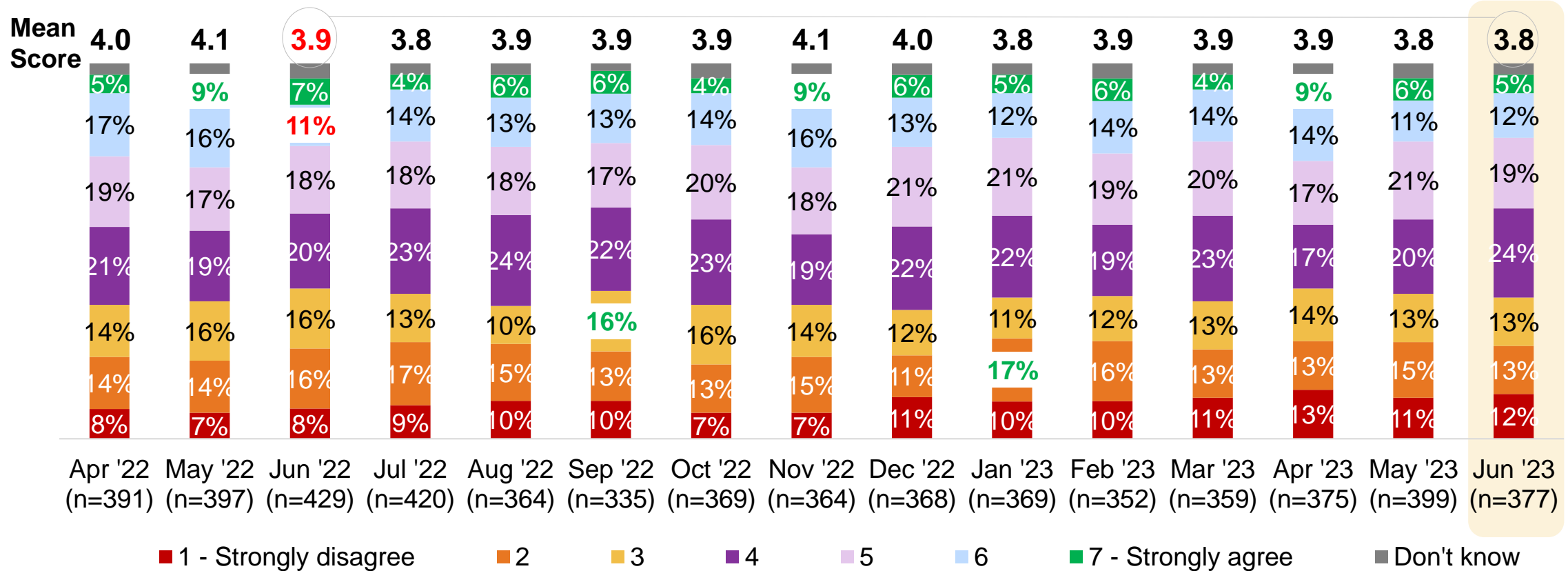
Green / red indicates significantly higher / lower than previous month

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* remains stable with last month. Compared to a year ago, fewer people agree PNA are 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

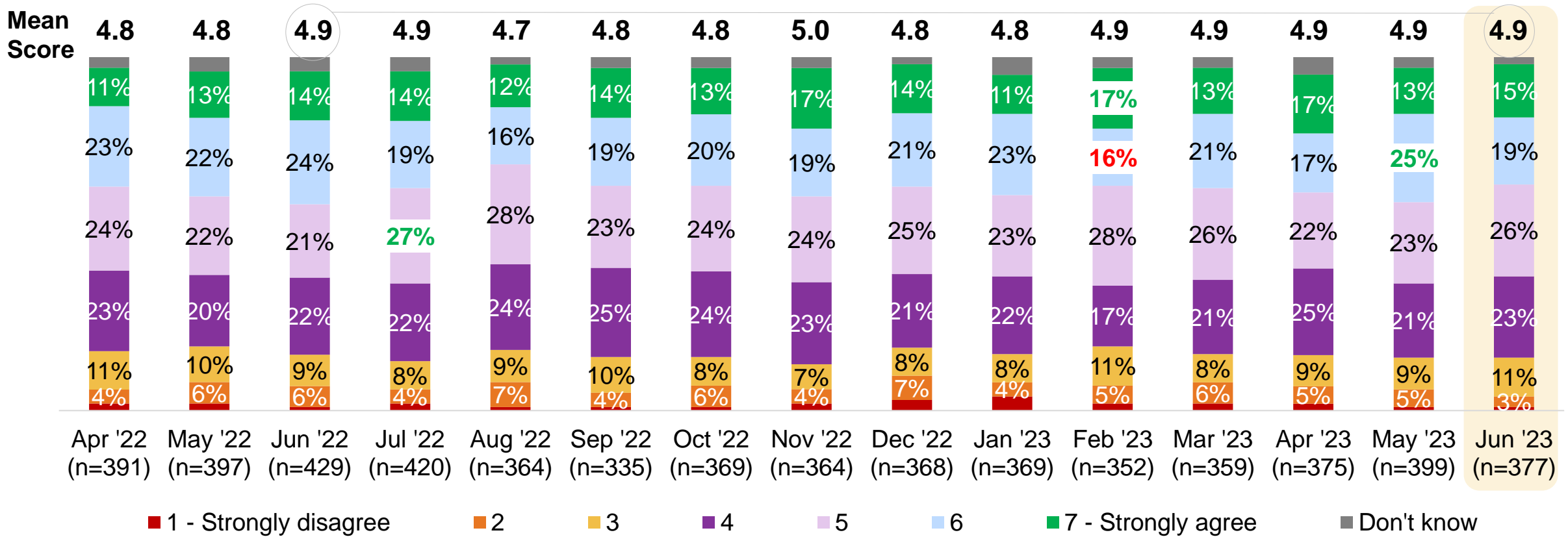
Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place

The number of visitors who agree that PNA visitors help ensure the areas they visit are protected and improved remained stable with last month. Compared to a year ago this is also 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”

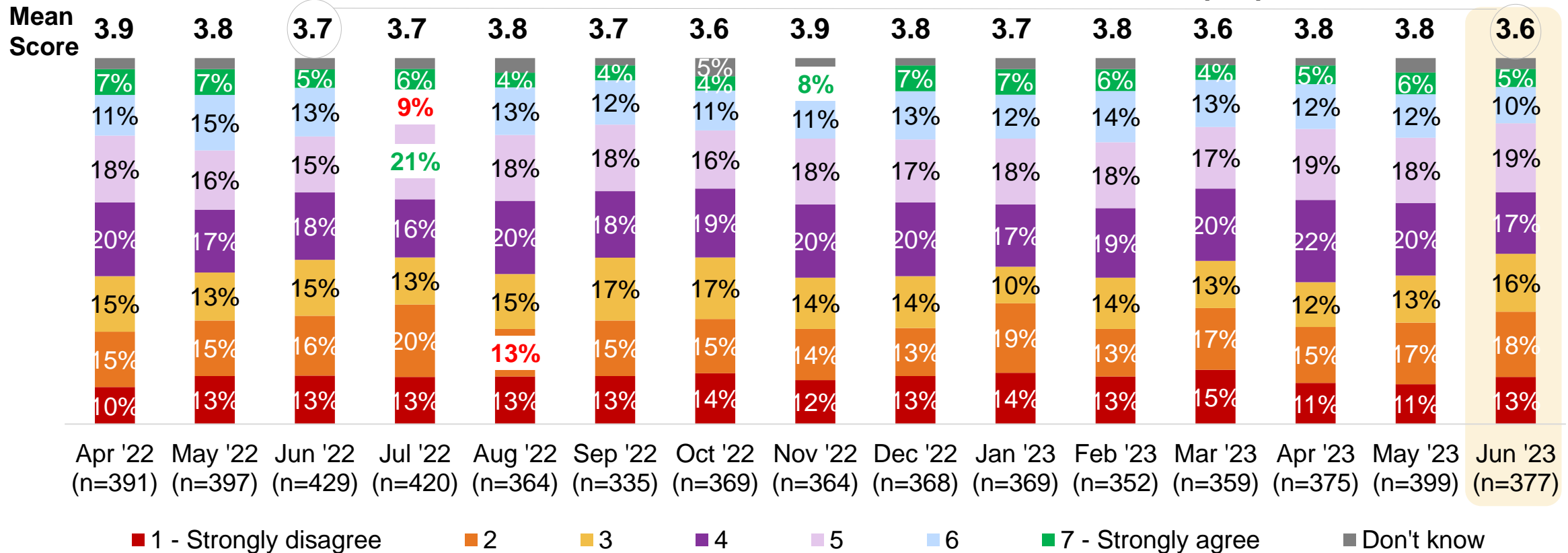


Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place

Agreement for the May period that *visitors affect the attractiveness of a Protected Natural Area* decreased from last month. Compared to a year ago, less people think visitors to PNAs make it less attractive for local people to visit.

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



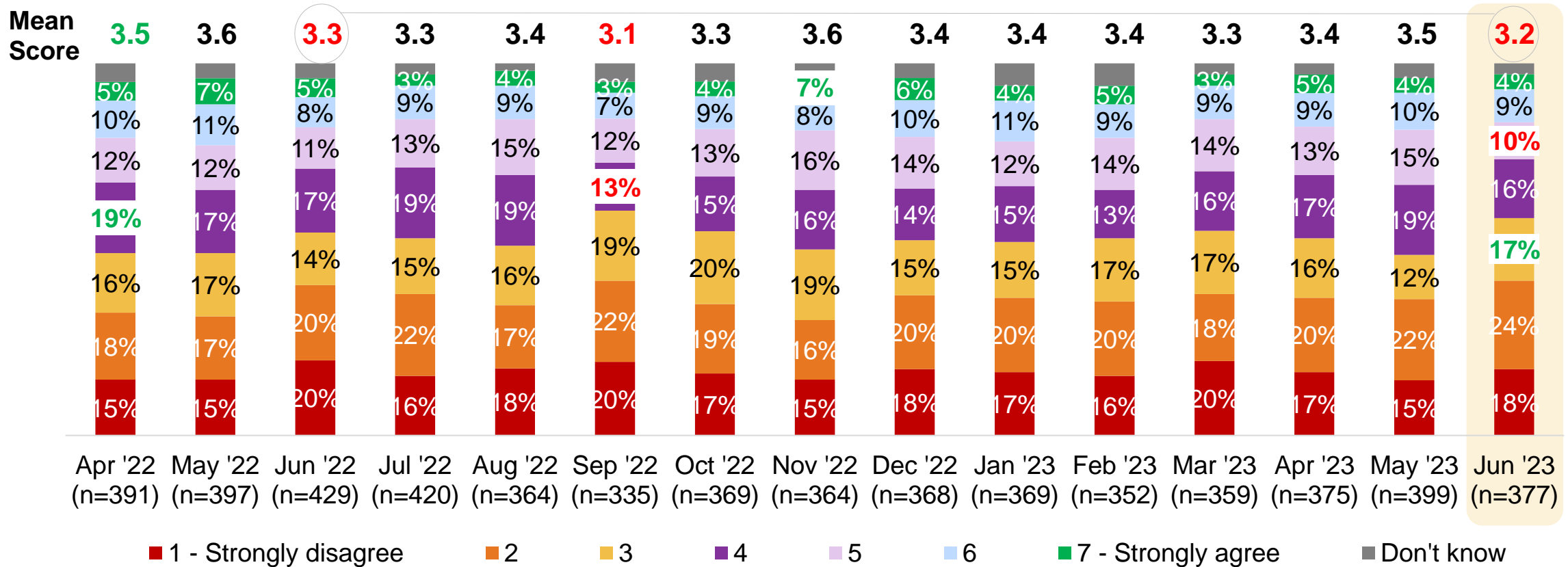
Green / red indicates significantly higher / lower than previous month

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

Base: Those who live near or regularly visit this place

For the period of May, agreement that *visitors weaken local traditions & cultures* significantly decreased from last month. Compared to a year ago, less people think visitors to PNAs weaken local communities' traditions and cultures.

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



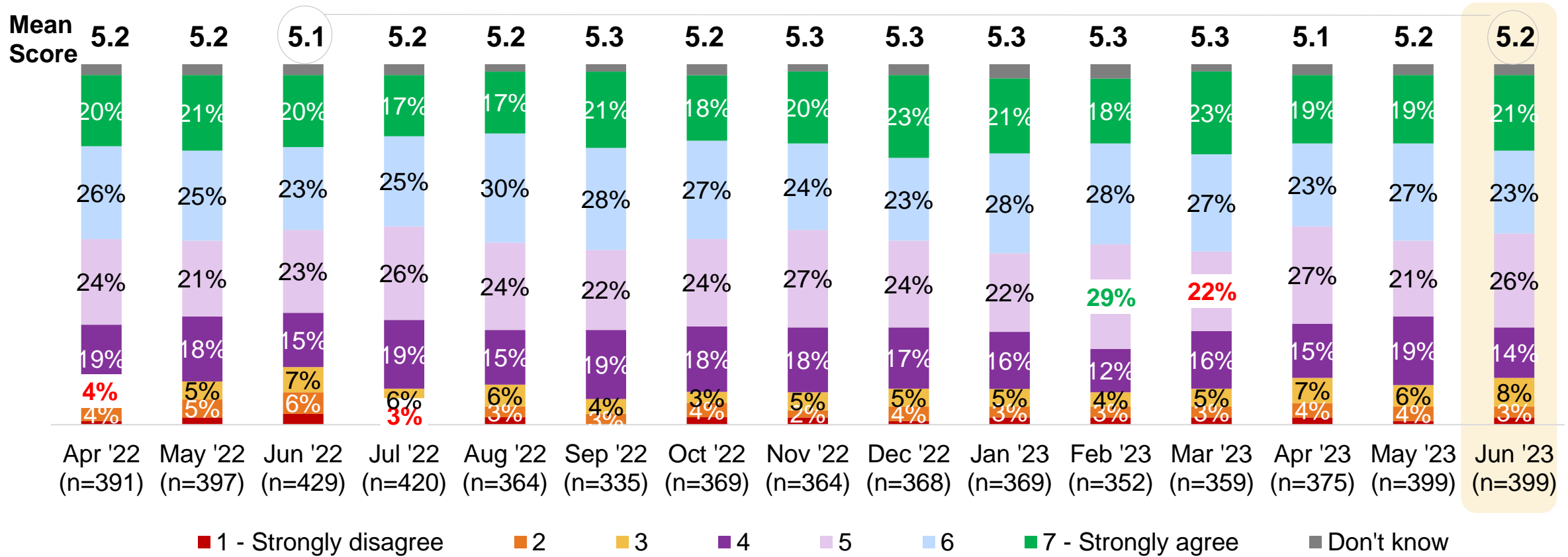
Green / red indicates significantly higher / lower than previous month

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

Base: Those who live near or regularly visit this place

For the period of May, agreement that *PNA visitors improve the local economy* remained stable with last month. Compared to a year ago, more people agree PNA visitors improve the local economy.

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



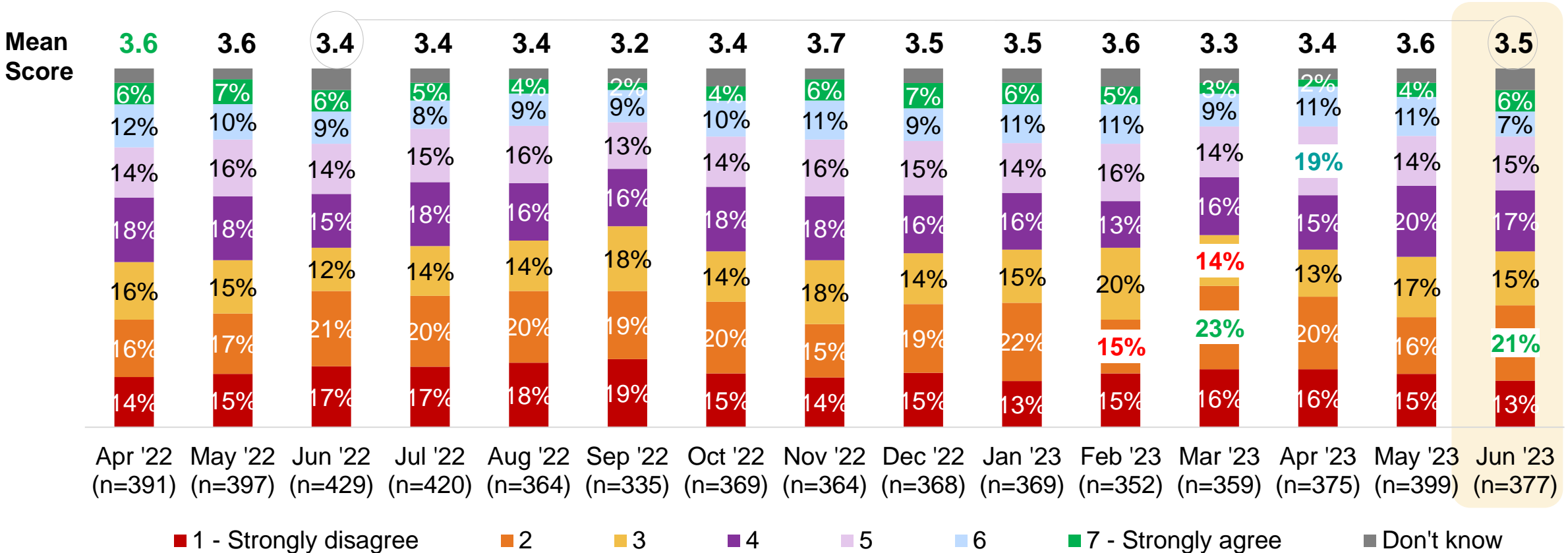
Green / red indicates significantly higher / lower than previous month

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

Base: Those who live near or regularly visit this place

For the period of May, agreement that *visitors add unwanted financial burdens to local communities* decreased from last month. However, compared to a year ago, slightly more people think PNA visitors add financial burdens onto 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

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*					
							
		n=	Beach / Coast	River / Lakes	Bush / Forest	Back-Country	Heritage Place
		7,312	2,828	927	1,593	881	1,083
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	4.9	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	4.8	4.6	4.8	4.9
	AVERAGE AGREEMENT WITH POSITIVE STATEMENTS (<i>higher numbers are better</i>)	5.0	4.9	5.0	4.9	4.9	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	3.7	3.3	3.5	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 (<i>lower numbers are better</i>)	3.7	3.7	3.9	3.4	3.8	3.6

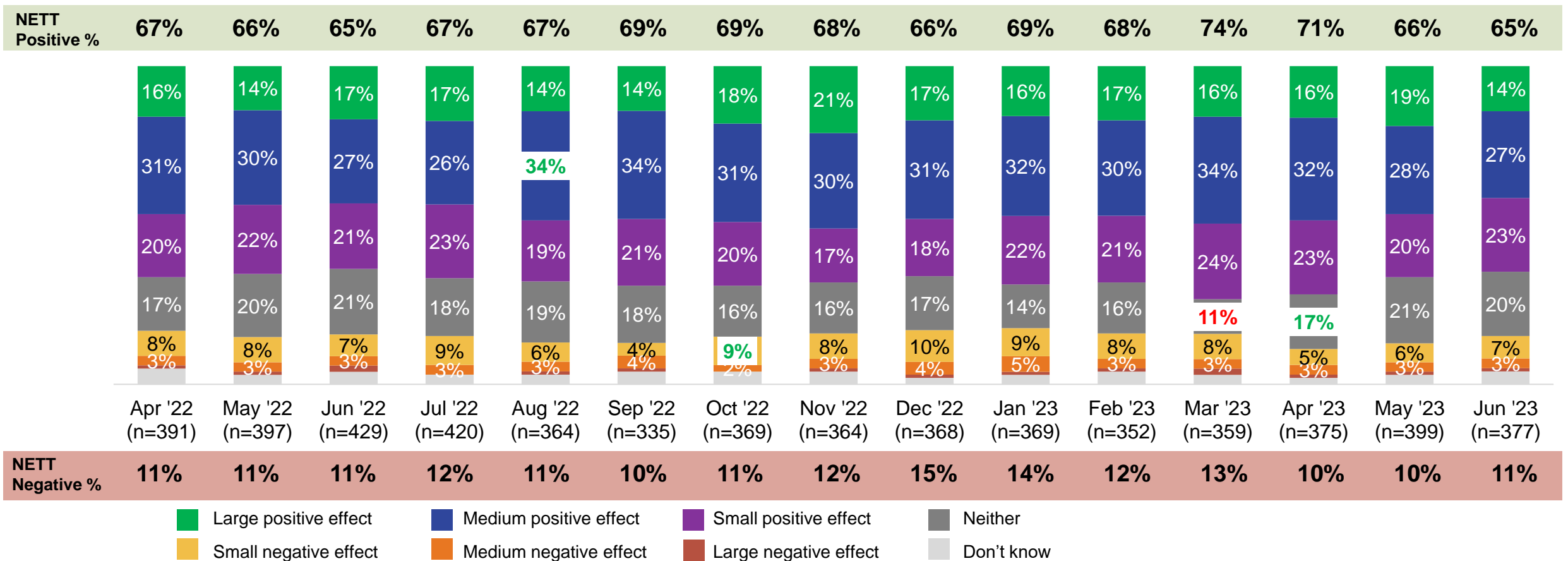
Green / red indicates significantly higher / lower than total

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.

Agreement from residents & visitors that visitors Protected Natural Areas visitors have a positive effect on the area remains similar to last month and a year ago.

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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