

DOC PUBLIC PULSE OF CONSERVATION

Monthly Topline Report – October 2022

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21 October, 2022



GAME CHANGERS



KEY FINDINGS – OCTOBER '22

- 44% have visited at least one Protected Natural Area in the past month, while 29% have visited at least one Protected Heritage Place. This remains stable compared to the past two months but is higher than a year ago, no doubt reflecting how Auckland was in a Covid-19 lockdown 12 months ago.
- Visitation frequency has increased too, in line with expected seasonal changes.
- Satisfaction with the overall experience at Protected Natural Areas remains high, especially for the exercise. However, satisfaction with the condition of toilets remains less satisfactory, and information and stories about nature, Māori culture could be improved.
- Protected Natural Areas' NPS has fallen due to an increase in detractors and decrease in promoters. This may be a seasonal effect given the low score also recorded in October 2021, reflecting the winter period being covered.
- Satisfaction with the overall experience at Protected Heritage Places has decreased slightly, with facilities satisfaction continuing a very slow decline. Although not statistically significant, the consecutive falls in satisfaction with PHP signage and maintenance should be noted. Despite minor declines in facility satisfaction, most visitors remain highly positive about their most recent experience at a Protected Heritage Place.
- Protected Heritage Places' NPS has continued to decrease, now at its lowest level since tracking began.



SUMMARY


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

BACKGROUND & METHODOLOGY



Sample size

1,000




Fieldwork dates
October 5-17, 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.

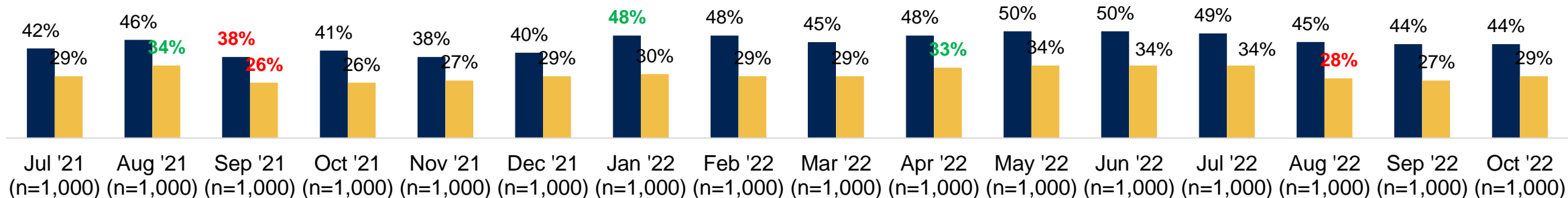
Previous waves

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

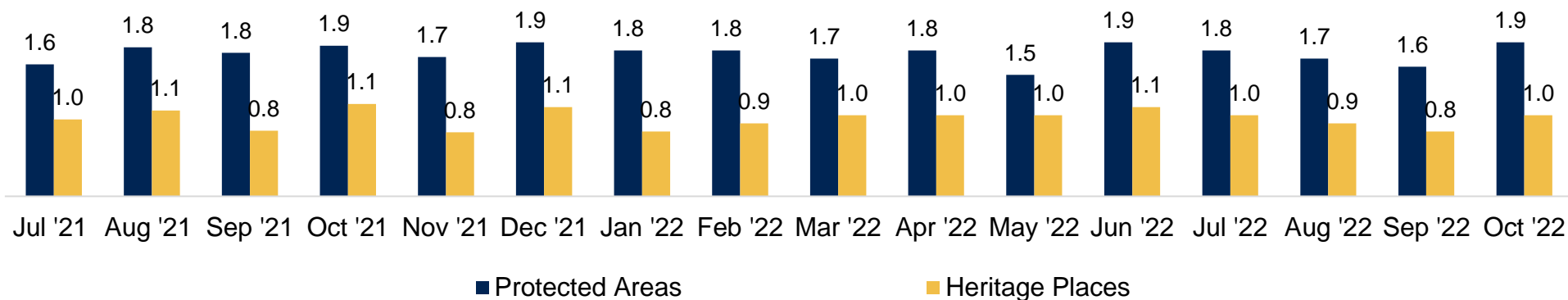
VISITATION FREQUENCY

The proportion visiting a Protected Natural Area or Heritage Place remains as the past couple of months, although visit frequency has increased. The year-on-year increase likely reflects how Auckland was in lockdown this time last year.

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*



Demographic differences (October)**

Protected Natural Areas

- 3.6 18-34 years
- 0.6 50-64 years
- 0.4 65+ years

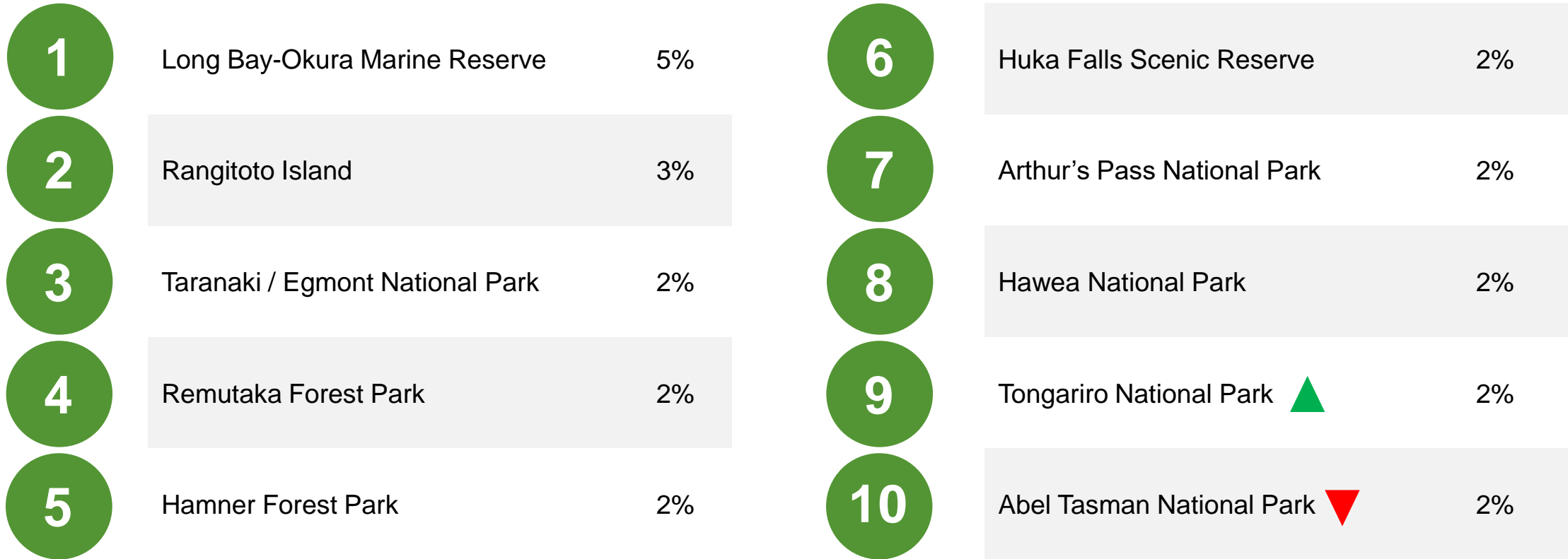
Protected Heritage Places

- 2.7 Māori
- 1.6 18-34 years
- 0.4 50-64 years
- 0.2 65+ years

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–OCT 2022.

The Nelson district flooding may well have contributed to the drop in visits to Abel Tasman.

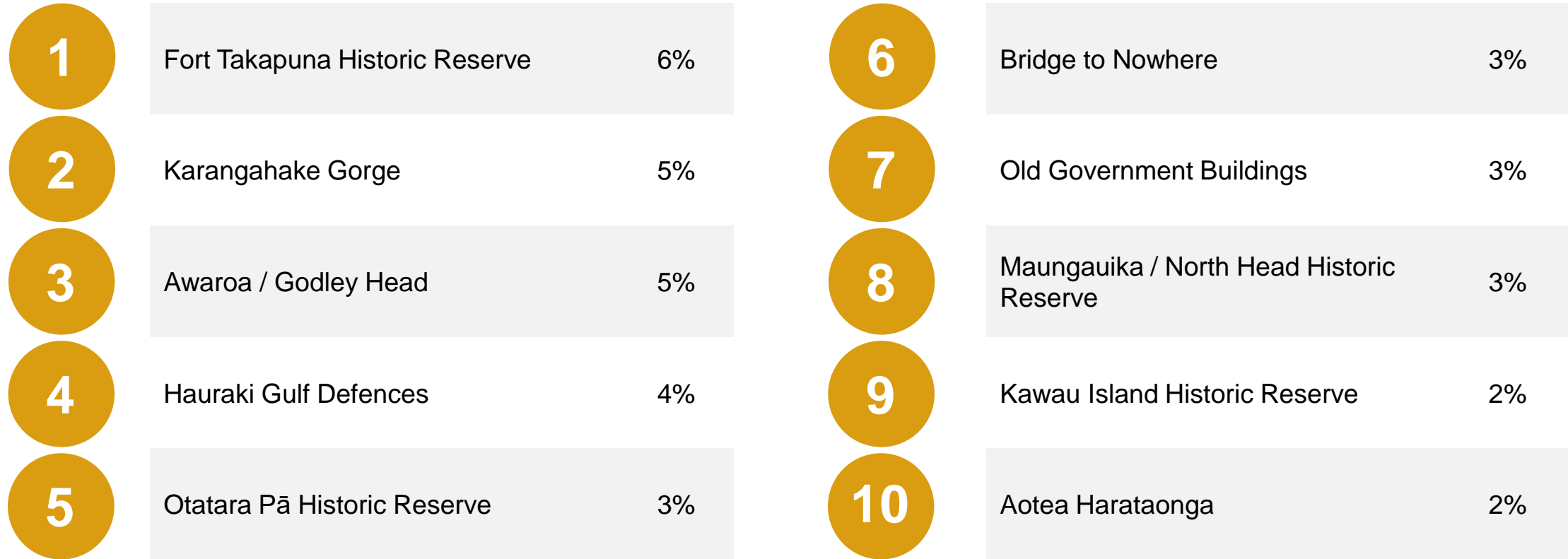


Green / red indicates Increase / decrease in rank position compared to previous month

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=7,562)

TOP-10 PROTECTED HERITAGE PLACES VISITED: JUN 2021–OCT 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=5,053)

Short walks & sightseeing remain the most common activities at Protected Natural Areas. The increase in those connecting with culture reflects the increased visitation to Protected Heritage Places.

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
Base (n=)	7,562	392	422	464	380	407	379	401	478	477	450	484	504	498	492	451	436	442
Short walk (<3 hours)	38%	37%	38%	36%	38%	35%	33%	33%	41%	33%	41%	38%	38%	38%	38%	44%	42%	40%
Sightseeing	30%	29%	28%	29%	32%	29%	29%	24%	31%	27%	30%	30%	32%	31%	30%	35%	34%	28%
Photography	25%	25%	29%	26%	26%	21%	22%	21%	24%	24%	27%	24%	25%	24%	25%	26%	26%	26%
Connecting with nature	23%	22%	21%	25%	22%	17%	25%	21%	21%	21%	24%	24%	25%	25%	26%	20%	22%	25%
Bird / wildlife watching	24%	25%	27%	28%	24%	26%	26%	24%	22%	20%	24%	25%	24%	24%	25%	26%	24%	24%
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%
Picnic, barbeque, etc	20%	20%	21%	17%	19%	17%	20%	19%	22%	21%	22%	22%	18%	19%	20%	20%	21%	21%
Connecting with history	13%	10%	13%	14%	14%	11%	17%	10%	12%	11%	16%	14%	14%	13%	13%	10%	13%	17%
Connecting with culture	10%	8%	9%	11%	11%	8%	11%	12%	10%	11%	10%	10%	12%	7%	11%	8%	8%	13%
Camping	12%	15%	14%	12%	14%	14%	14%	12%	16%	14%	13%	12%	11%	11%	11%	11%	8%	10%
Boating / sailing	8%	9%	9%	10%	5%	8%	8%	8%	10%	10%	10%	9%	9%	8%	8%	7%	6%	9%

Green / red indicates significantly higher / lower than previous month

Demographic differences (October)

Women are more likely (49%), while males are less likely (31%) to go for a short walk.

Green / red (demographics) indicates significantly higher / lower than total

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

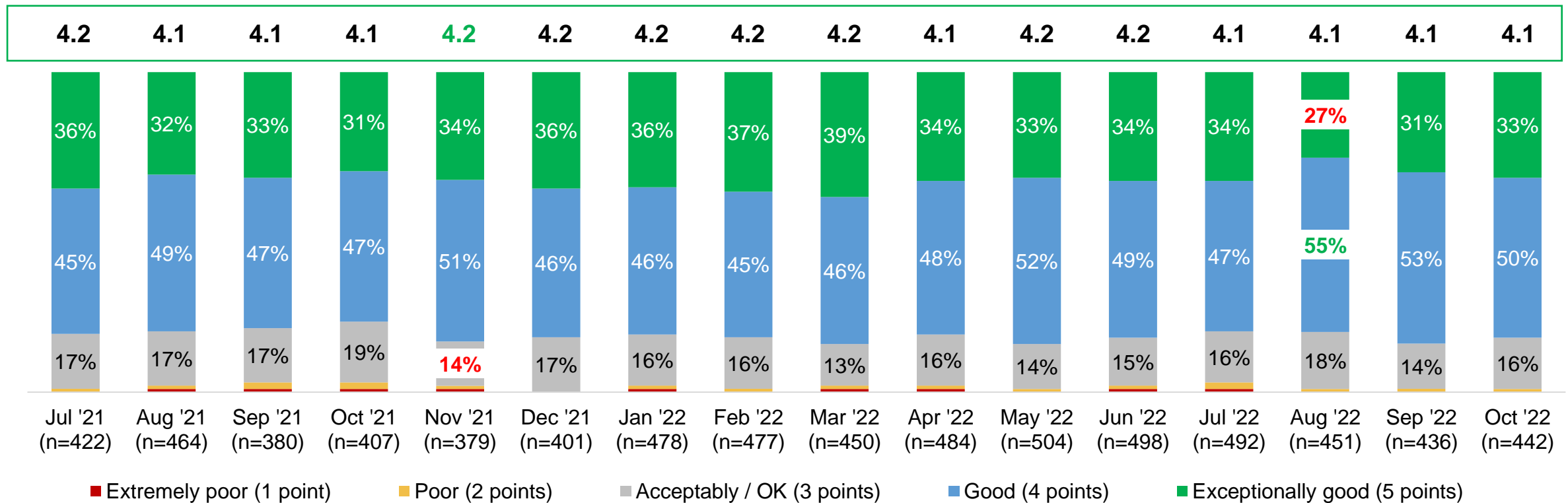
Base: Those who visited a Protected Natural Area in the last month. *Note: Only activities 6% and above for current month displayed. **Caution: Low base size (n<100), results indicative only.

VISIT SATISFACTION

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

Protected Natural Areas – Overall Experience

Mean Score

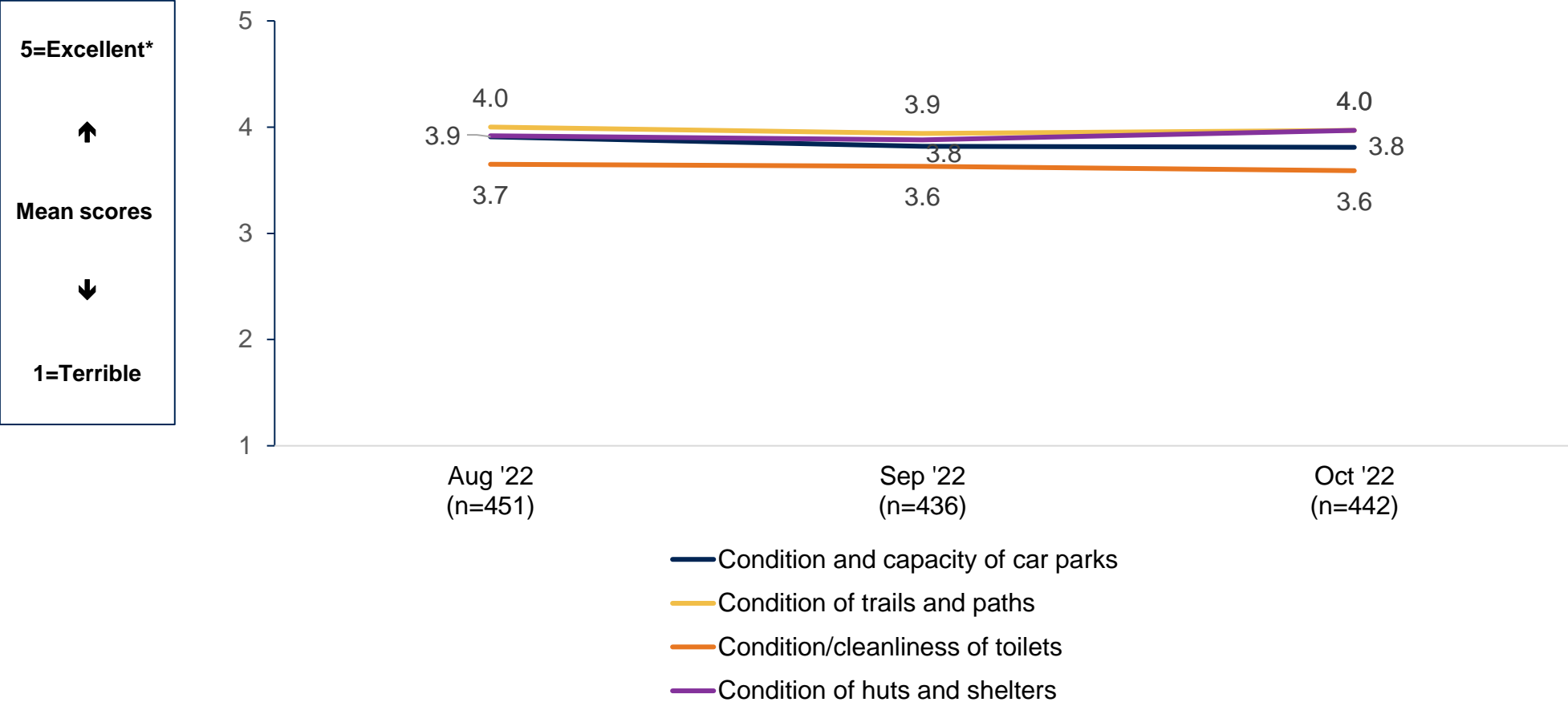


Q15: Overall, how would you rate your experience at <LOCATION SELECTED IN Q8>?

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

Visitors are generally satisfied with the facilities at PNAs, although satisfaction with the *condition of toilets* remains less satisfactory.

Satisfaction with Protected Natural Areas: Facilities

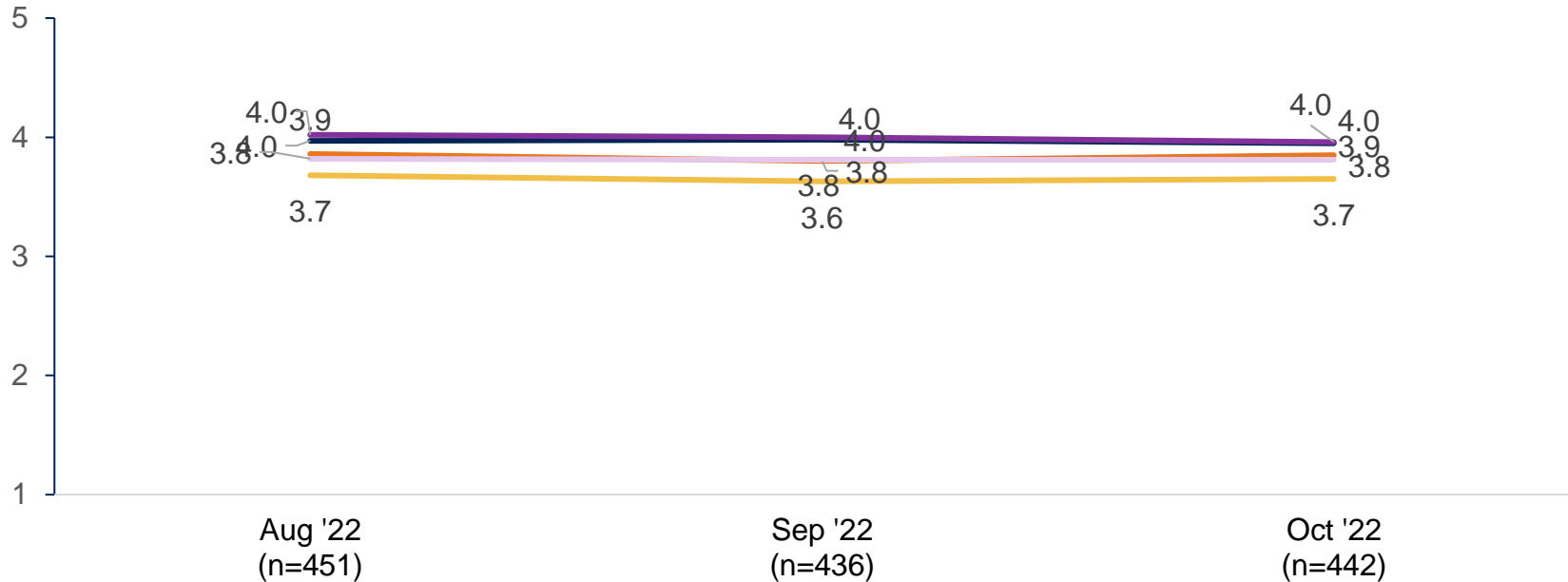
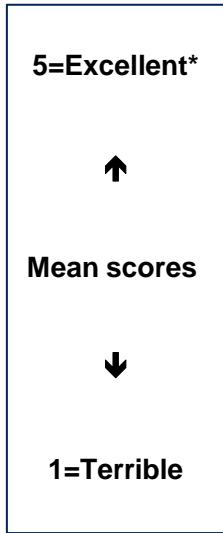


Q14a: Still thinking about your most recent visit to <LOCATION SELECTED IN Q8>, how would you rate the following aspects listed below?
Base: Those who visited a Protected Natural Area in the last month. *Note: The mean score excludes 'Don't know / not applicable' responses. Higher mean scores are desirable.



Visitors are generally satisfied with the general signage and maintenance of PNAs, although *information and stories about nature, Māori culture* could be improved.

Satisfaction with Protected Natural Areas: Signage and Maintenance

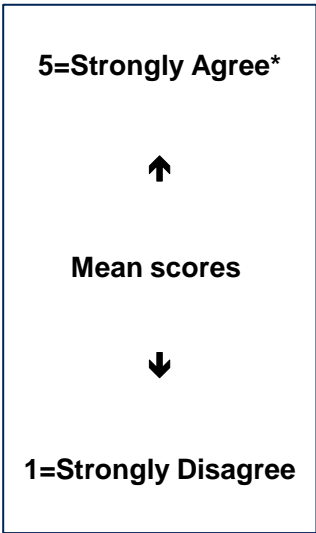


- Safety information, directional signs, barriers, bridges, etc.
- Information and stories about nature, Māori culture, local history, etc.
- Overall suitability of facilities provided at the place - car parks, paths, toilets, huts, etc.
- Overall standard of maintenance/presentation of the place
- Management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

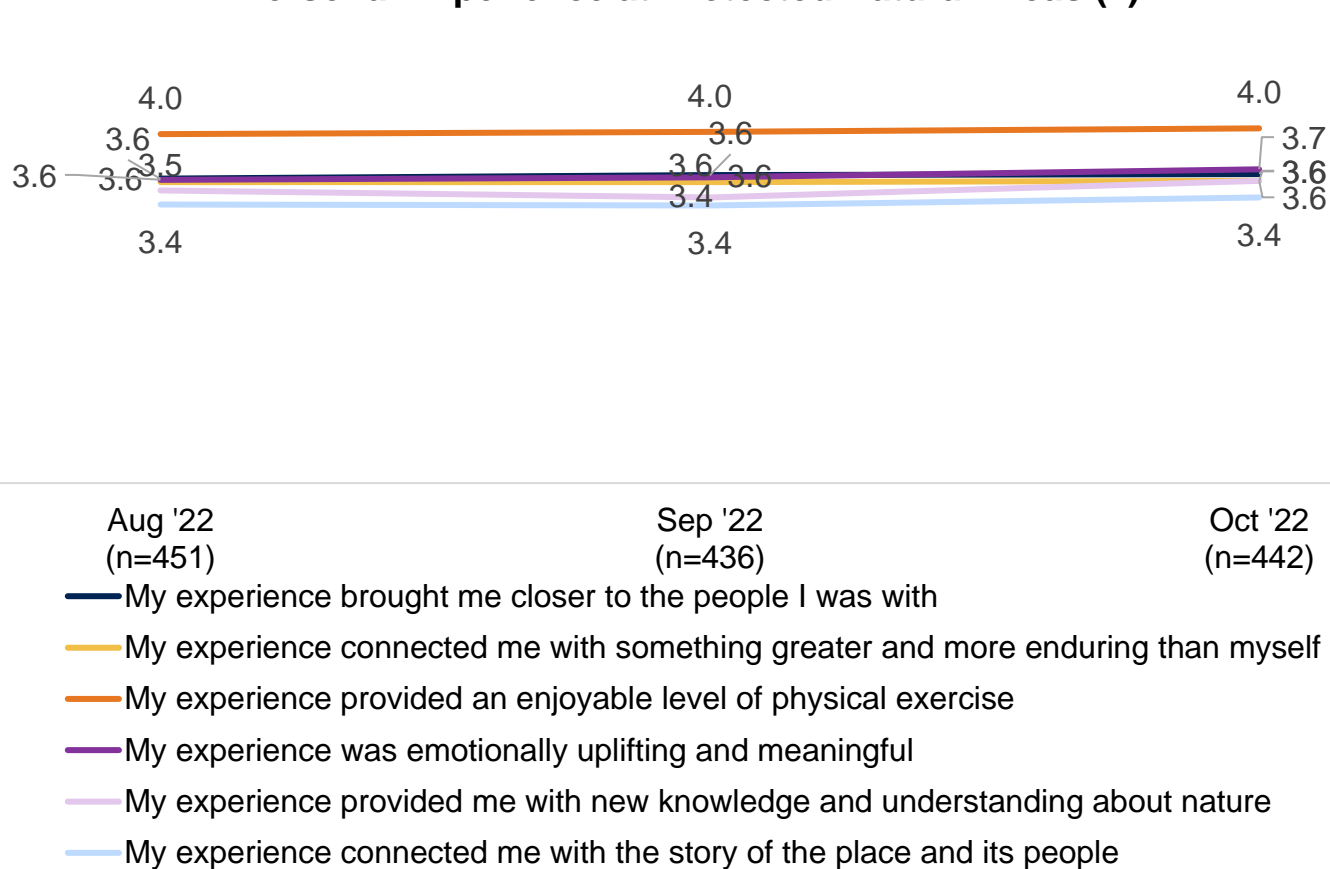
Q14a: Still thinking about your most recent visit to <LOCATION SELECTED IN Q8>, how would you rate the following aspects listed below?

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

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



Personal Experience at Protected Natural Areas (1)

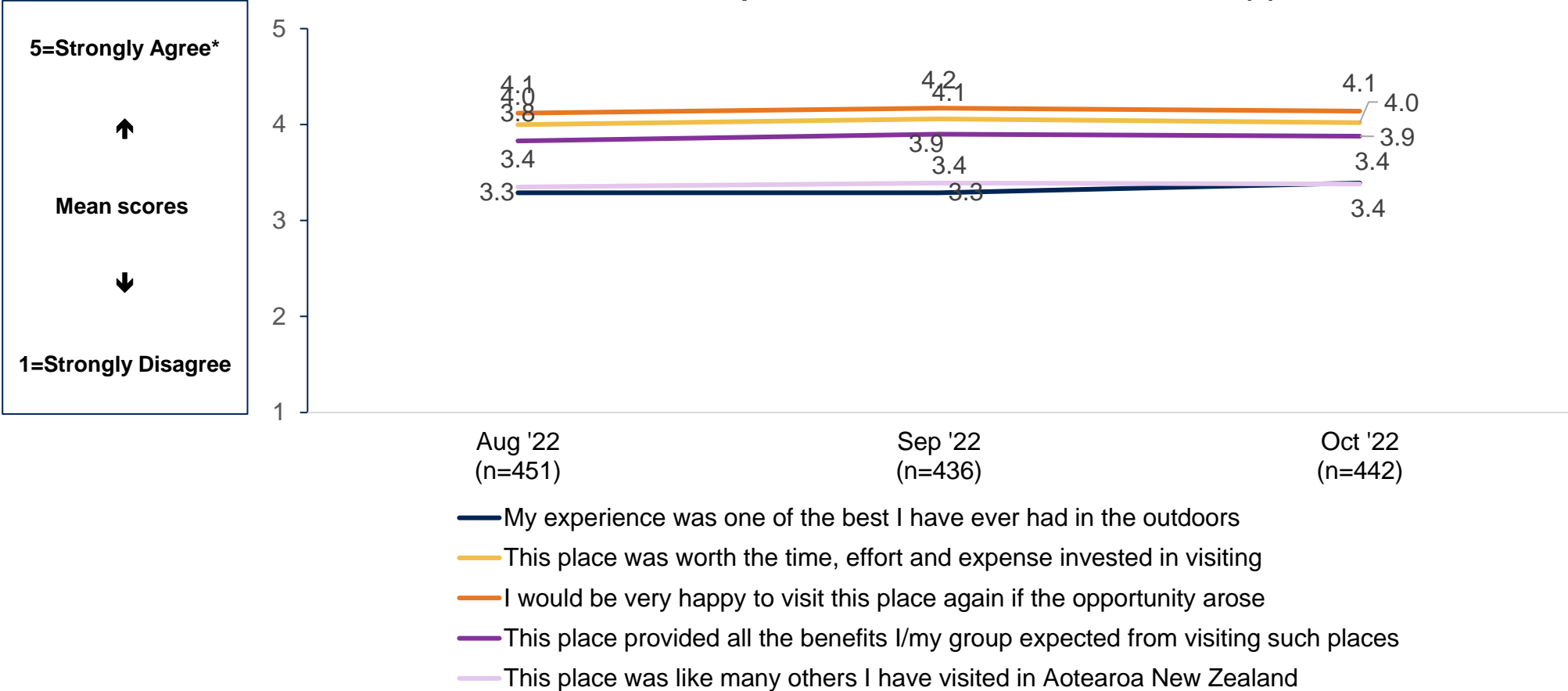


Q14b: Still thinking about your most recent visit to <LOCATION SELECTED IN Q8>, how much do you agree or disagree with each of the statements below?

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 the visited Areas were like many others they had visited.

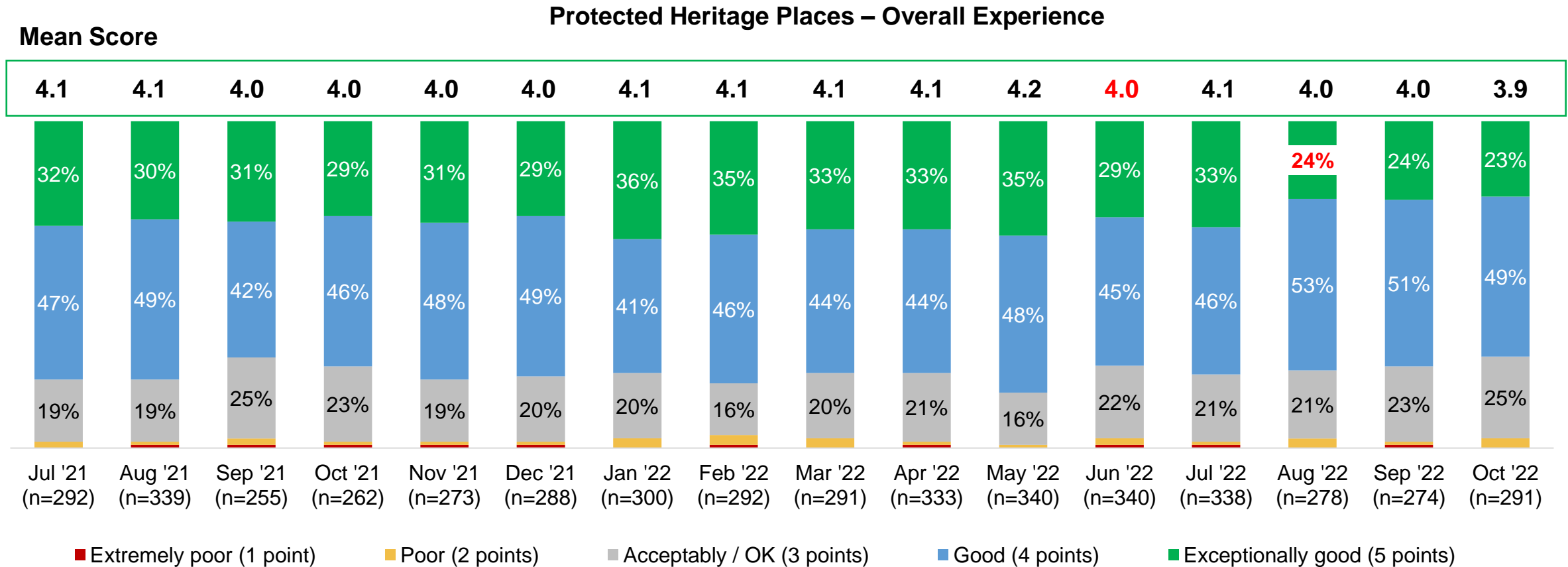
Personal Experience at Protected Natural Areas (2)



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 slightly, reflecting a small increase in those having a poor or just 'acceptable' experience.

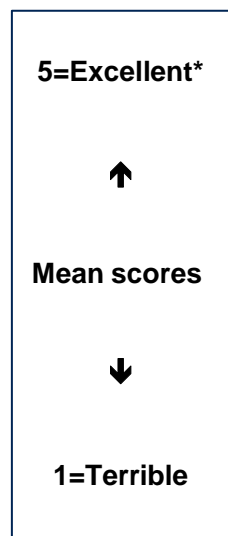


Green / red indicates significantly higher / lower than previous month

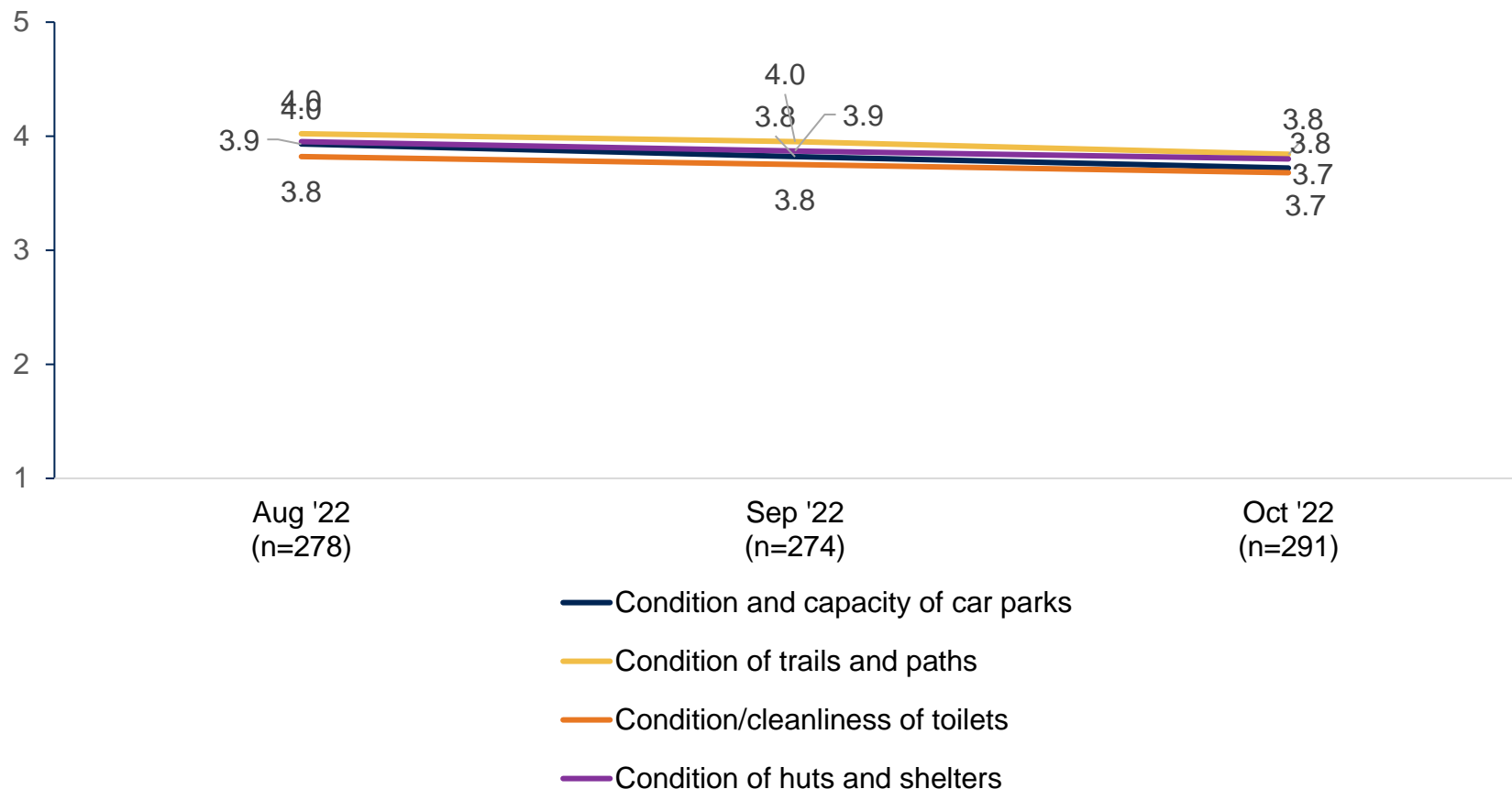
Q27: Overall, how would you rate your experience at <LOCATION SELECTED IN Q20>?

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

Visitor satisfaction with facilities at Protected Heritage Places has continued a very slow decline.



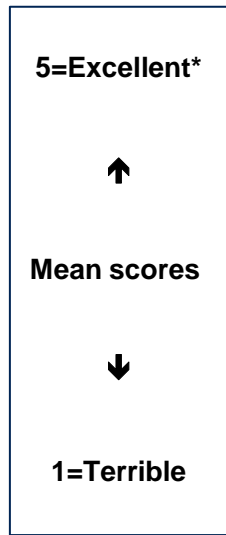
Satisfaction with Protected Heritage Places: Facilities



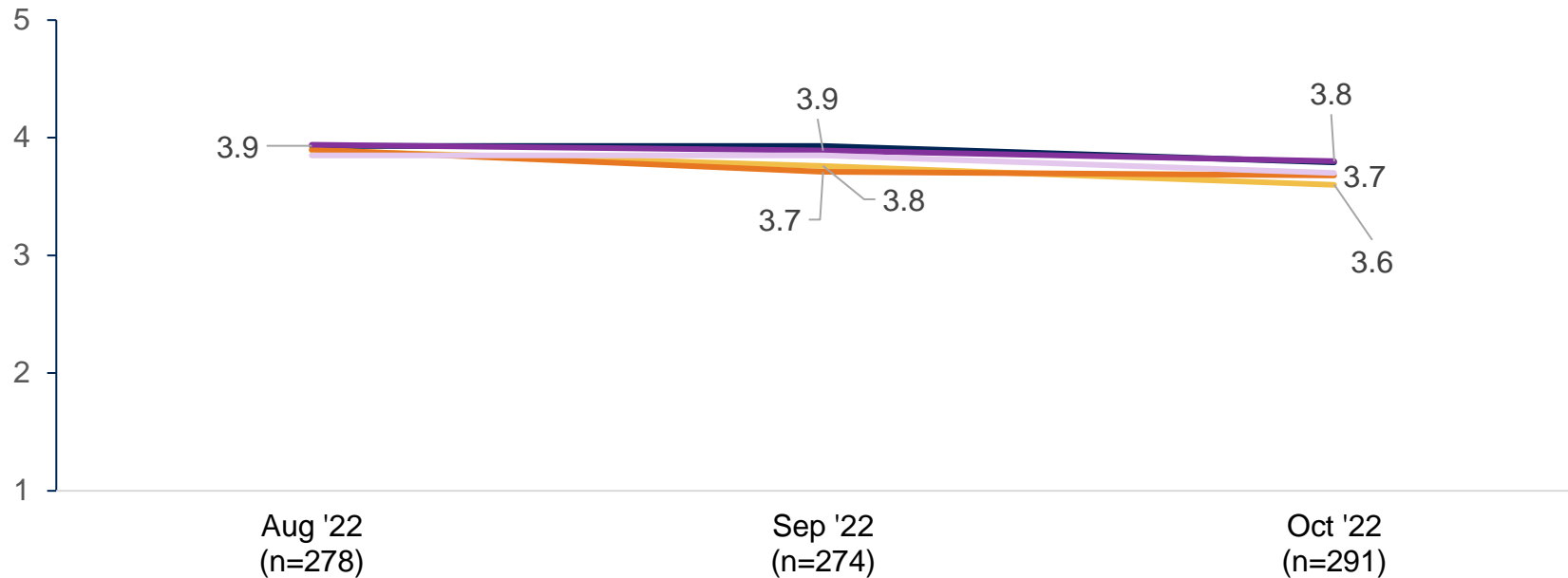
Q26a: Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how would you rate the following aspects listed below?

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.

Although not statistically significant, the consecutive falls in satisfaction with PHP signage and maintenance should be noted.



Satisfaction with Protected Heritage Places: Signage and Maintenance



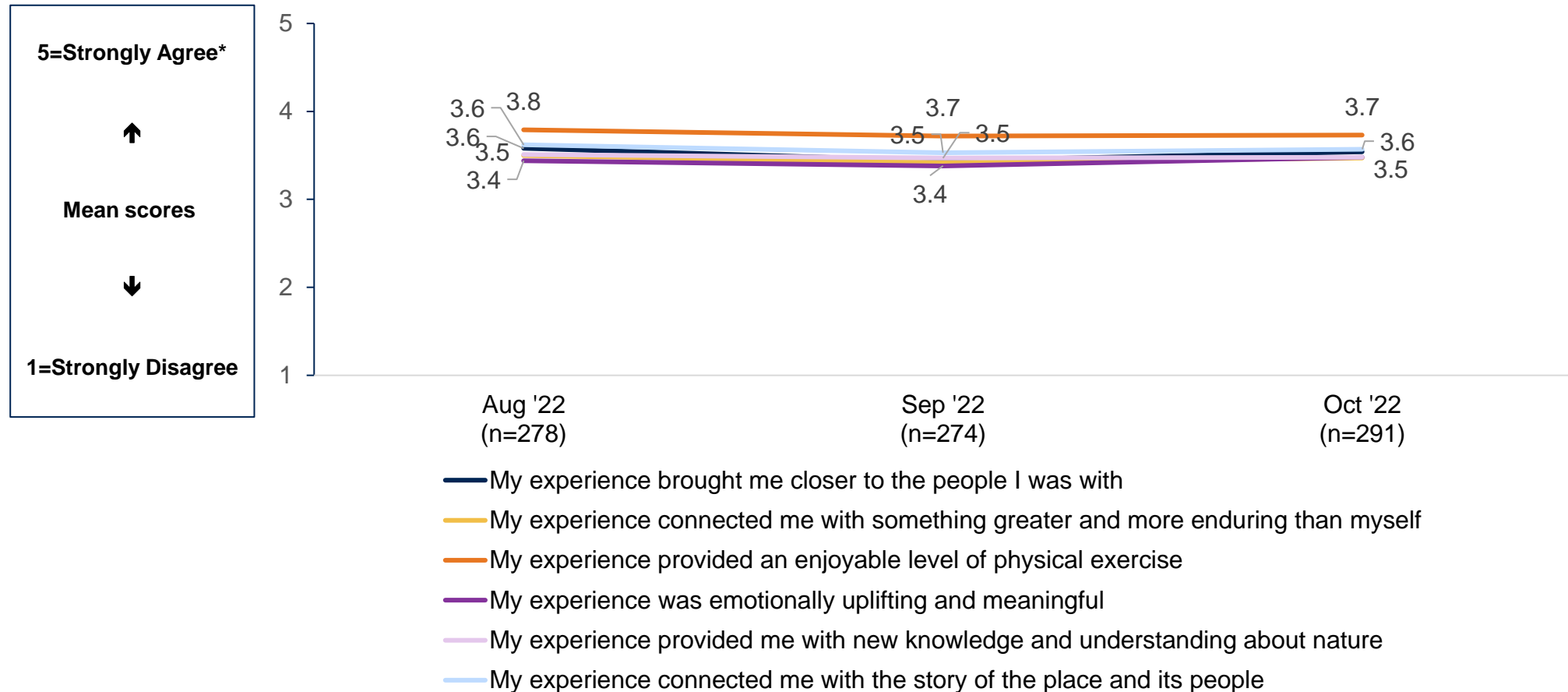
- Safety information, directional signs, barriers, bridges, etc.
- Information about nature, Māori culture, local history, etc.
- Overall suitability of facilities provided at the place - car parks, paths, toilets, huts, etc.
- Overall standard of maintenance/presentation of the place
- Management of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

Despite minor declines in facility satisfaction, most visitors remain highly positive about their most recent experience at a Protected Heritage Place.

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.

Most PHP visitors agree they would be happy to visit the place again if the opportunity arose.

Personal Experience at Protected Heritage Places (2)



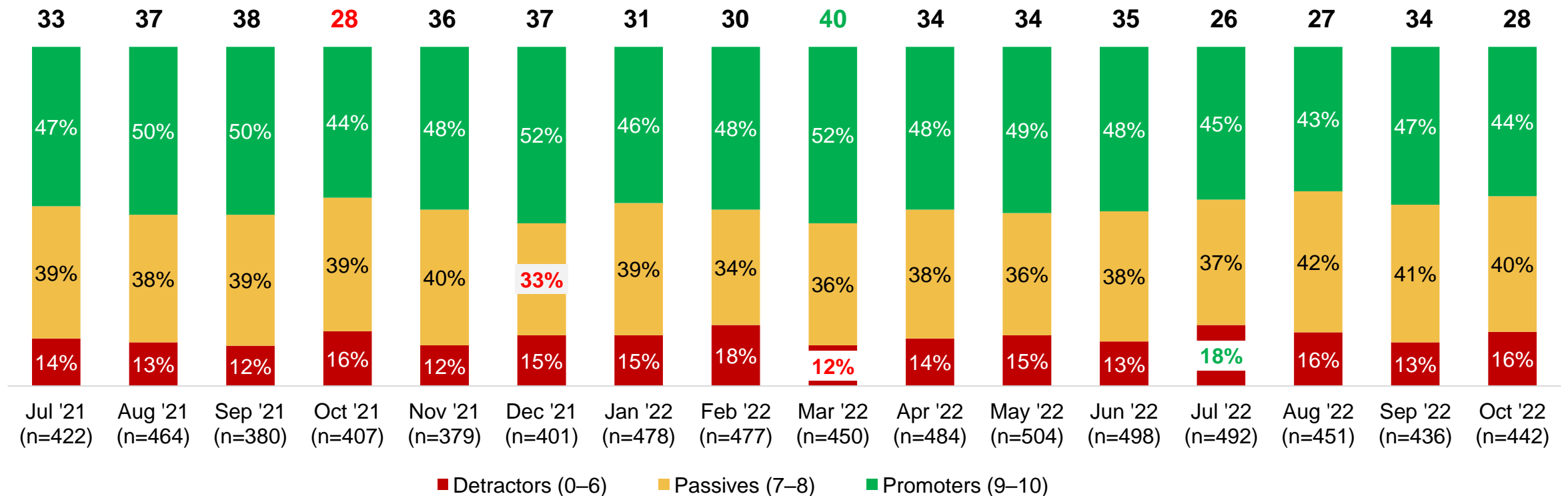
Q26b: Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how much do you agree or disagree with each of the statements below?

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

NPS

Protected Natural Areas' NPS has fallen due to an increase in detractors and decrease in promoters. This may be a seasonal effect given the low score also recorded in October 2021, reflecting the winter period being covered.

Protected Natural Areas – NPS



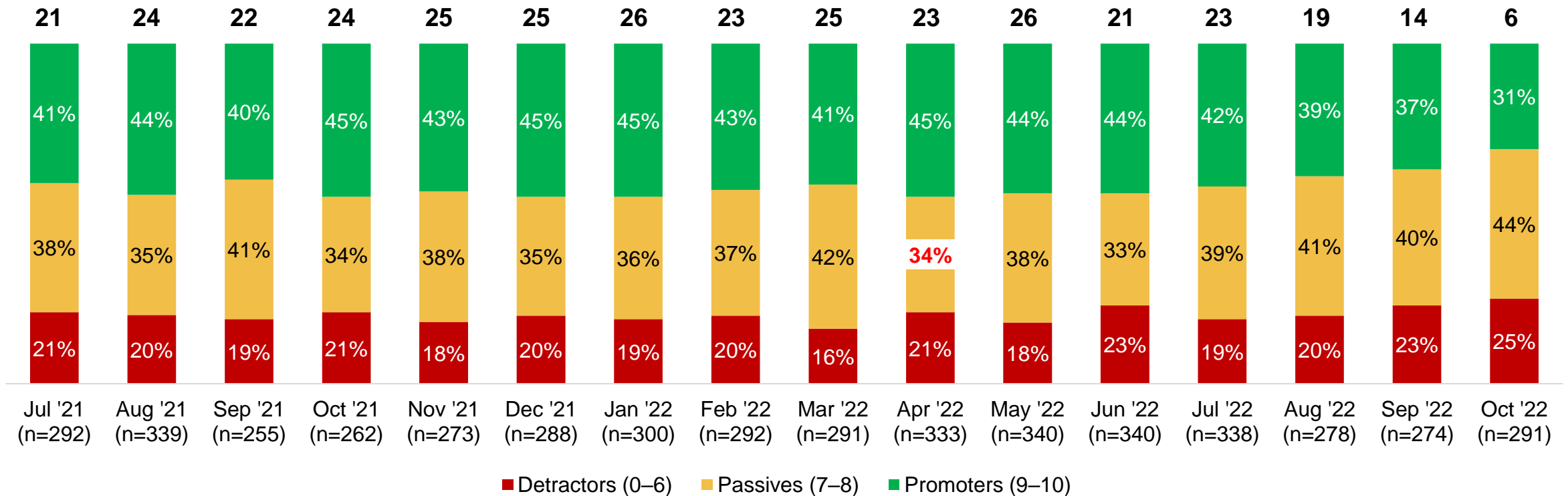
Green / red indicates significantly higher / lower than previous month

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 continued to decrease, now at its lowest level since tracking began.

Protected Heritage Places – NPS



Green / red indicates significantly higher / lower than previous month

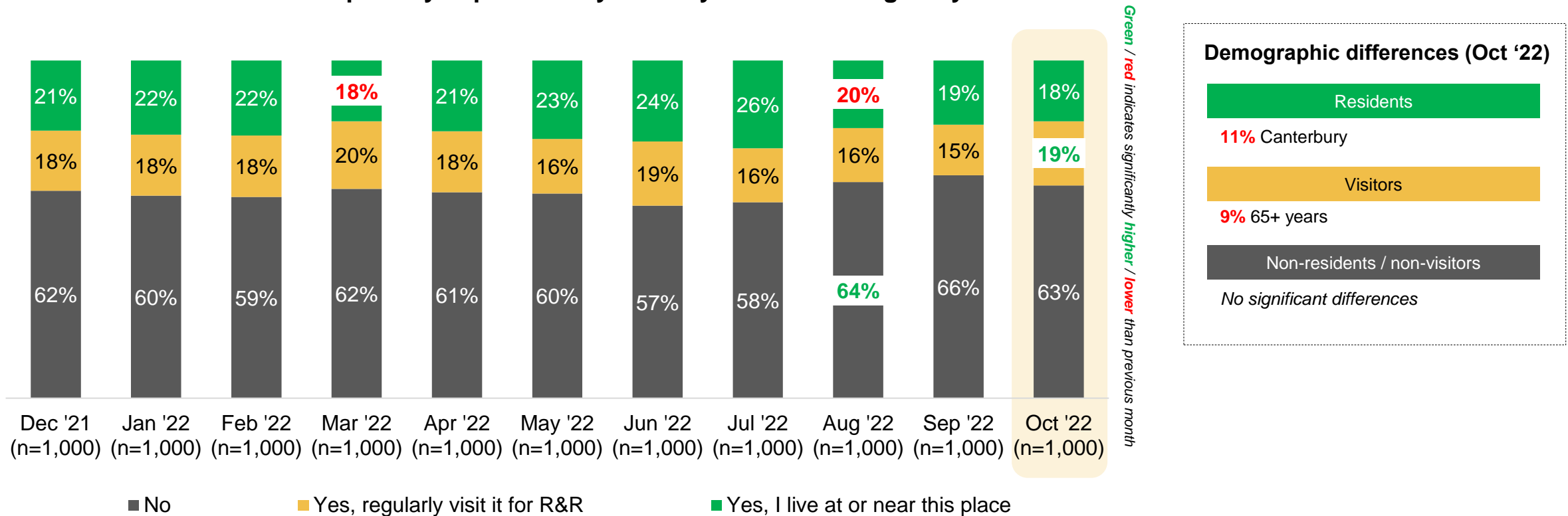
Q28: How LIKELY is it you would RECOMMEND <LOCATION SELECTED IN Q20> to your family or friends?

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

‘THRIVE’ MODULE

There has been an increase in the number of visitors that regularly visit a PNA of personal importance to them.

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

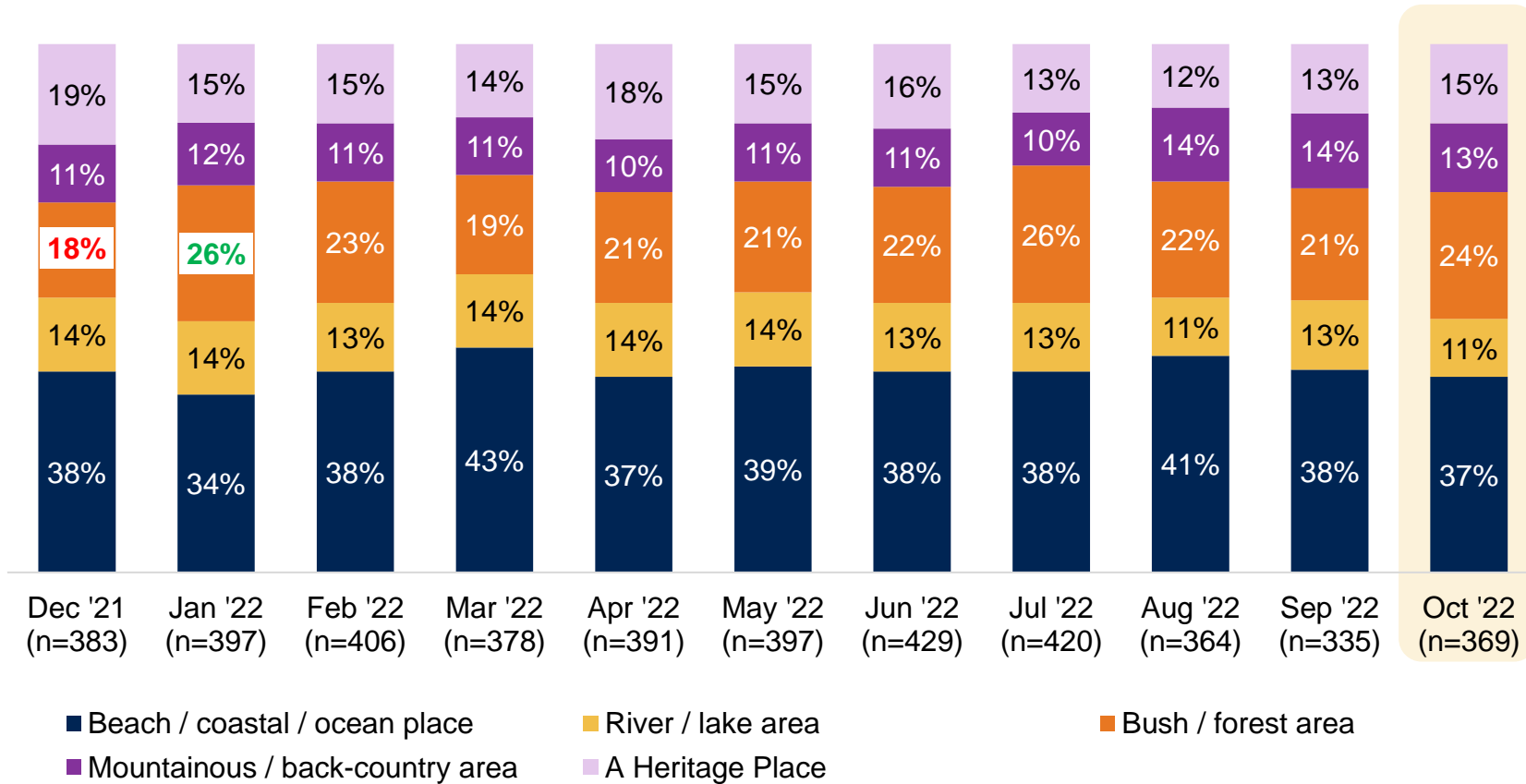


Q40: Is there a Protected Natural Area in New Zealand that is especially important to you? If there is more than one such place, please think about the place that is the MOST important to you.

Base: Total sample

There is no major change in the nature of the places important to people.

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



Green / red indicates significantly higher / lower than previous month

Demographic profile (total n=4,670)

- Beach / coastal area**
 - 46% Auckland
 - 42% 50-64 years
 - 34% Canterbury
 - 31% Māori
 - 27% Manuwatu/Whanganui
 - 24% Waikato
- River / lake area**
 - 42% 50-64 years
 - 20% Waikato
 - 18% Bay of Plenty
 - 34% Canterbury
 - 31% Māori
 - 8% Auckland
- Bush / forest**
 - 31% Waikato
 - 31% Wellington
 - 19% Auckland
 - 18% Asian
 - 15% Indian
- Mountainous / back-country area**
 - 14% 18-34 years
 - 10% Auckland
 - 9% 65+ years
 - 8% Bay of Plenty
- Protected Heritage Place**
 - 11% Wellington
 - 9% Otago

Green / red (demographics) indicates significantly higher / lower than total

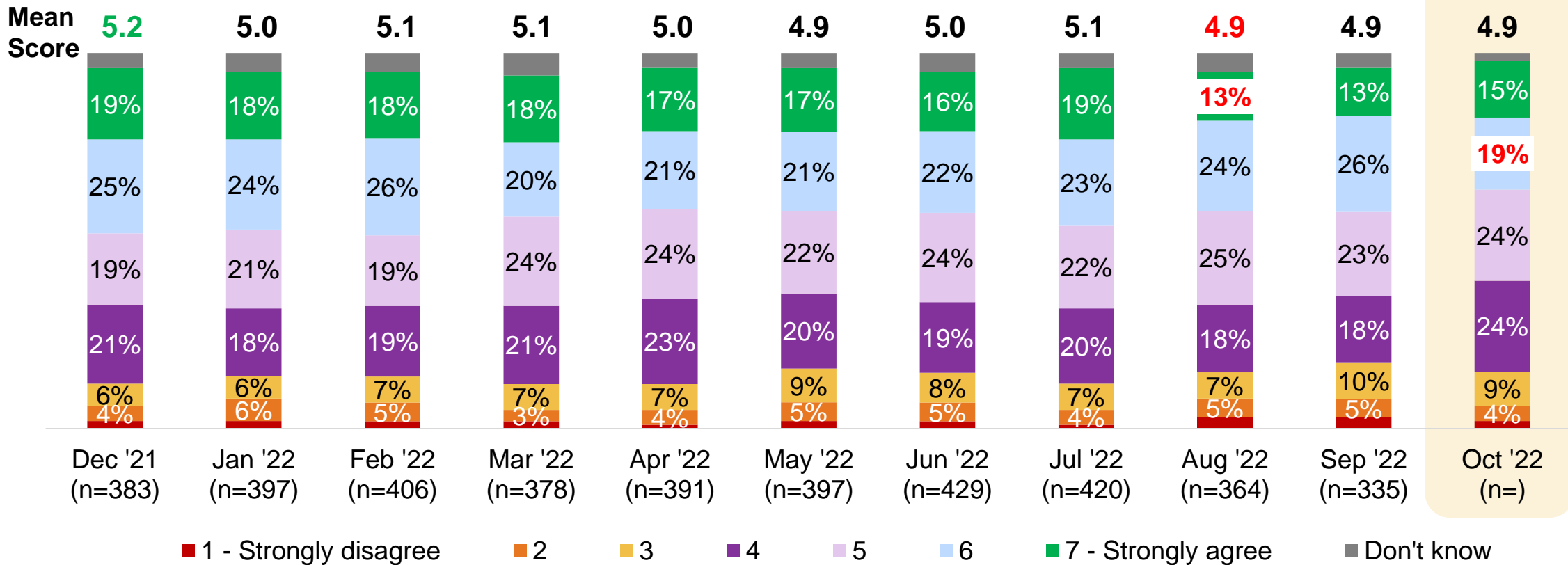
Q41: Which of the following best describes the location of this place?

Base: Those who live near or regularly visit this place



The number of people who agree that *visitors enable local stories, identities & traditions* has decreased, with more people feeling somewhat neutral.

“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

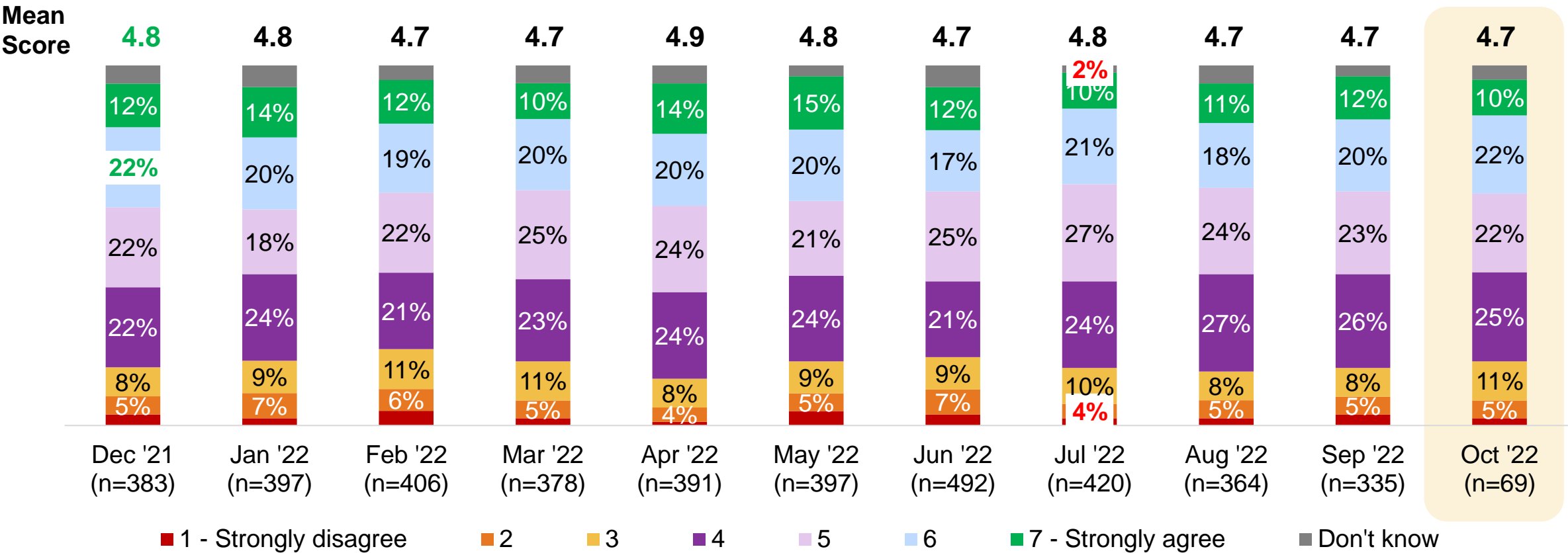
Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place

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Agreement that *visitors improve the quality of life of the local communities* remains fairly neutral-to-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

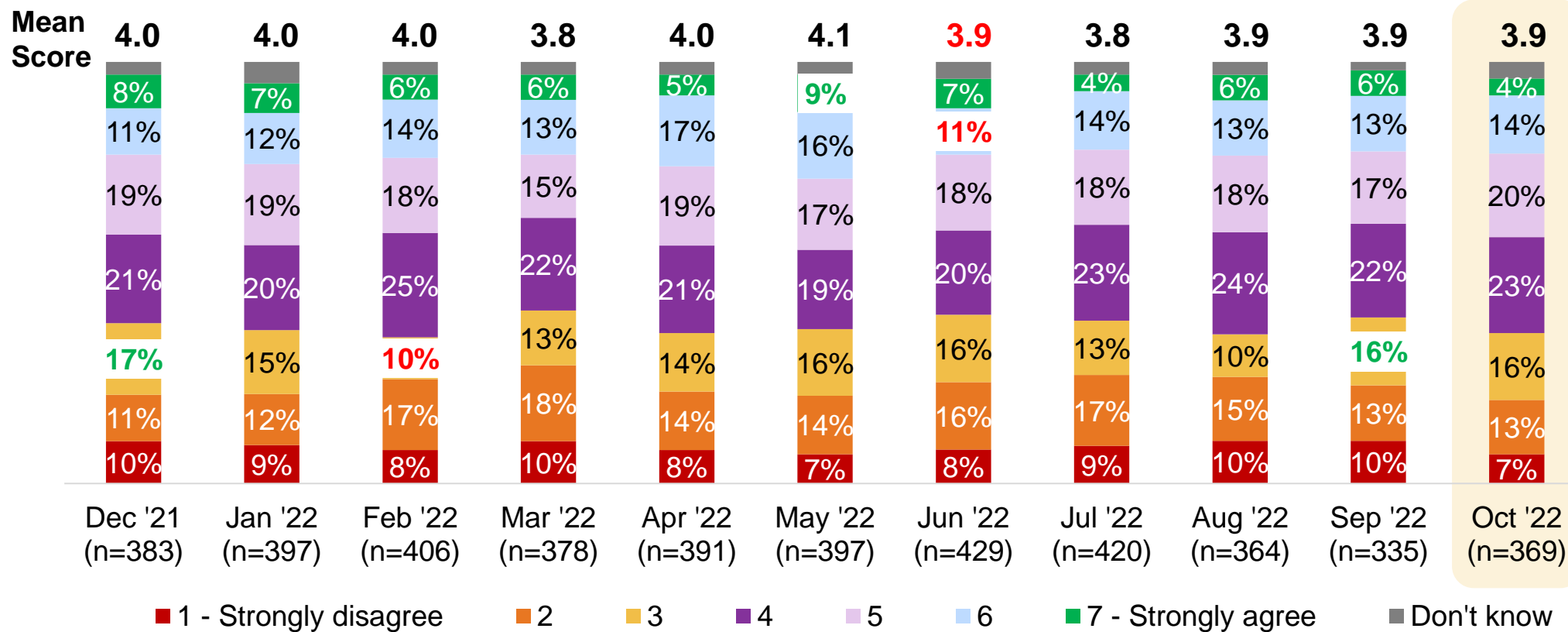
Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place



There has been a slight increase in those believing that their 'special' PNA suffers from *visitor-created damage*.

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



Mean score demographic differences (Oct)*
18-34 years (4.3)

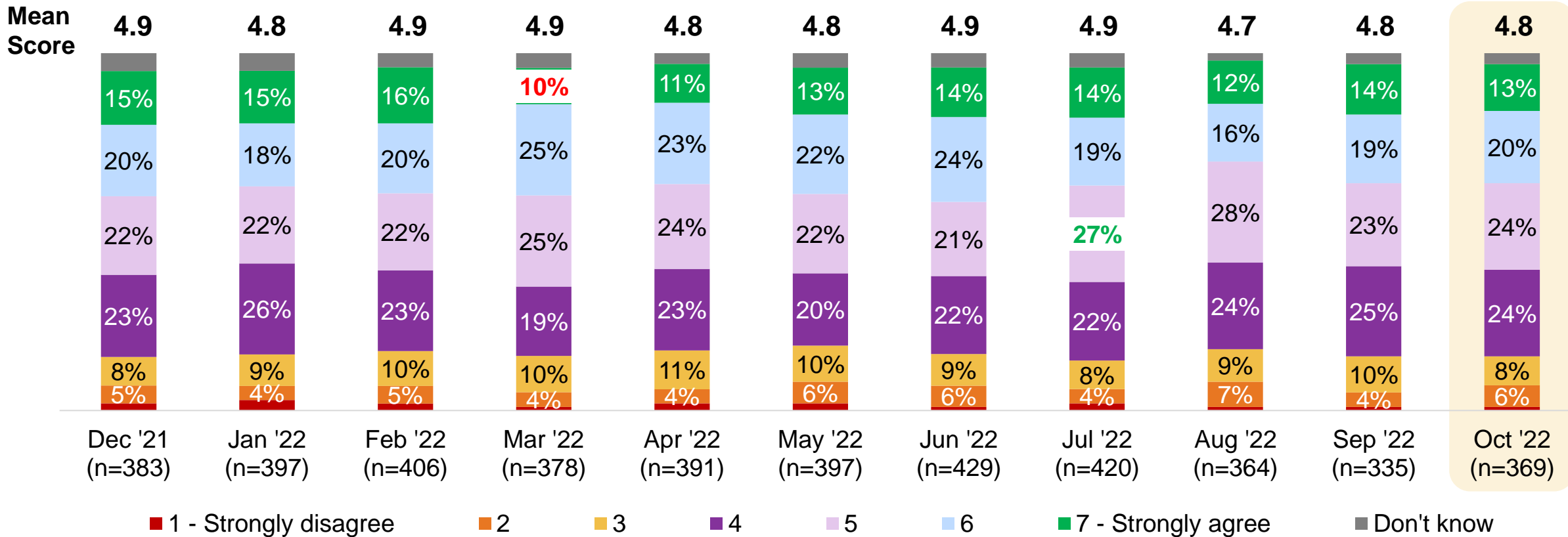
Green / red indicates significantly higher / lower than previous month

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.

The perception that *visitors' to PNAs help ensure areas are protected & improved* remains one that a small majority agree with.

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



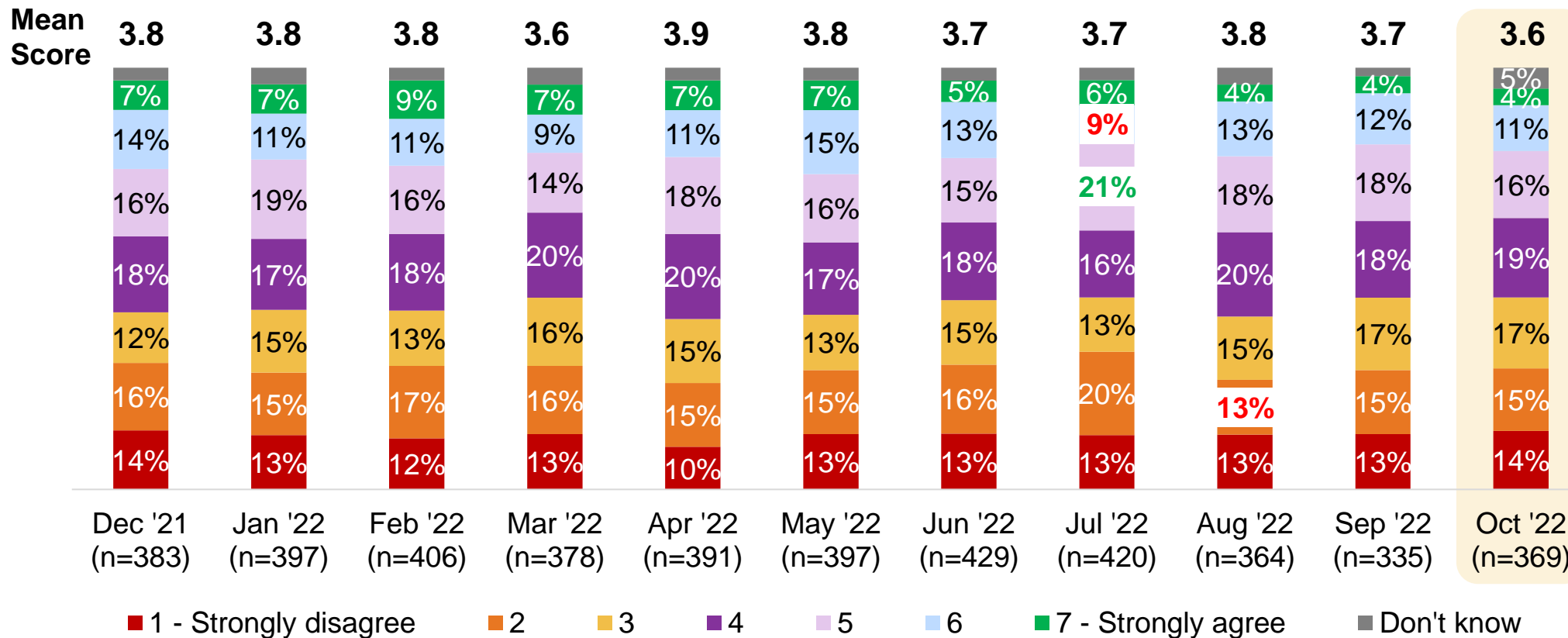
Green / red indicates significantly higher / lower than previous month

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.

Perceptions of *visitors affecting the attractiveness of the PNA* vary widely, with the mean score at its lowest point since March.

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



Mean score demographic differences (Oct)*
18-34 years (4.0)

Green / red indicates significantly higher / lower than previous month

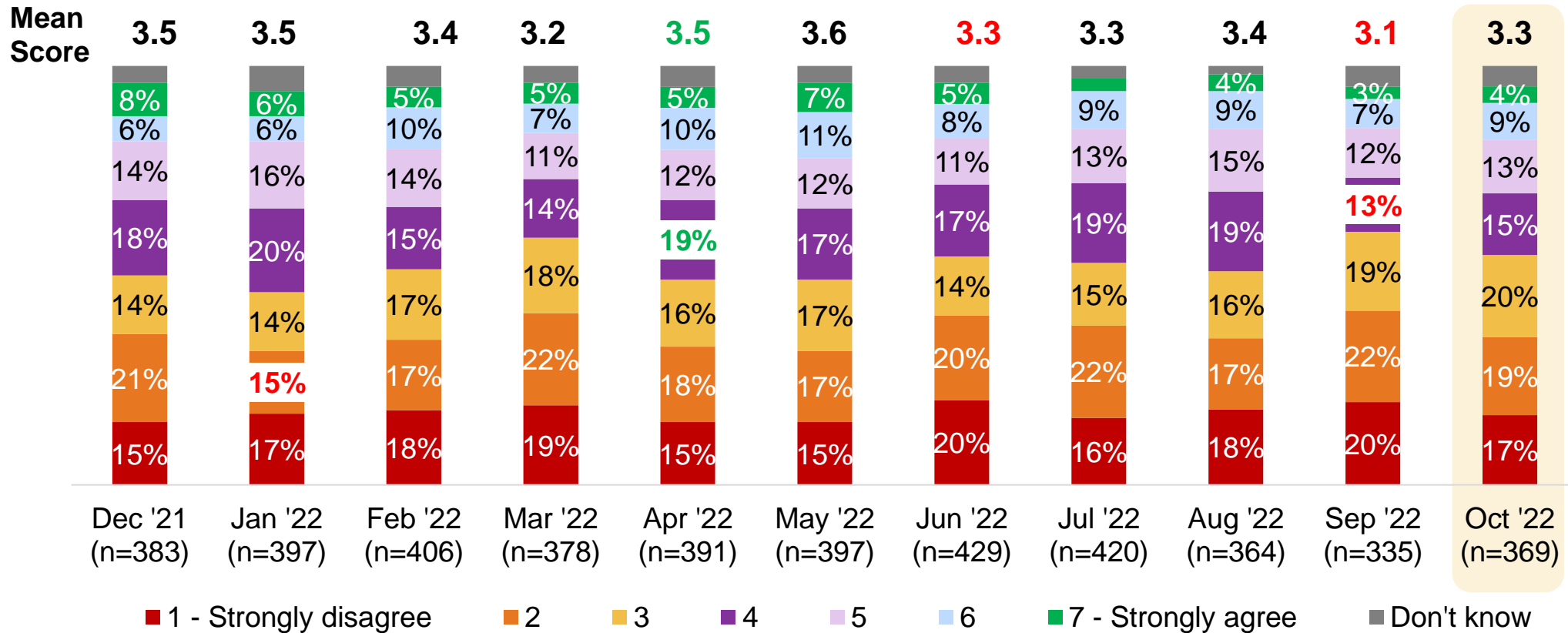
Q42: How much do you agree or disagree with each of the following statements?

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 twice as likely to disagree than agree that *visitors weaken local traditions & cultures.*

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



Mean score demographic differences (Oct)*
18-34 years (3.8)

Green / red indicates significantly higher / lower than previous month

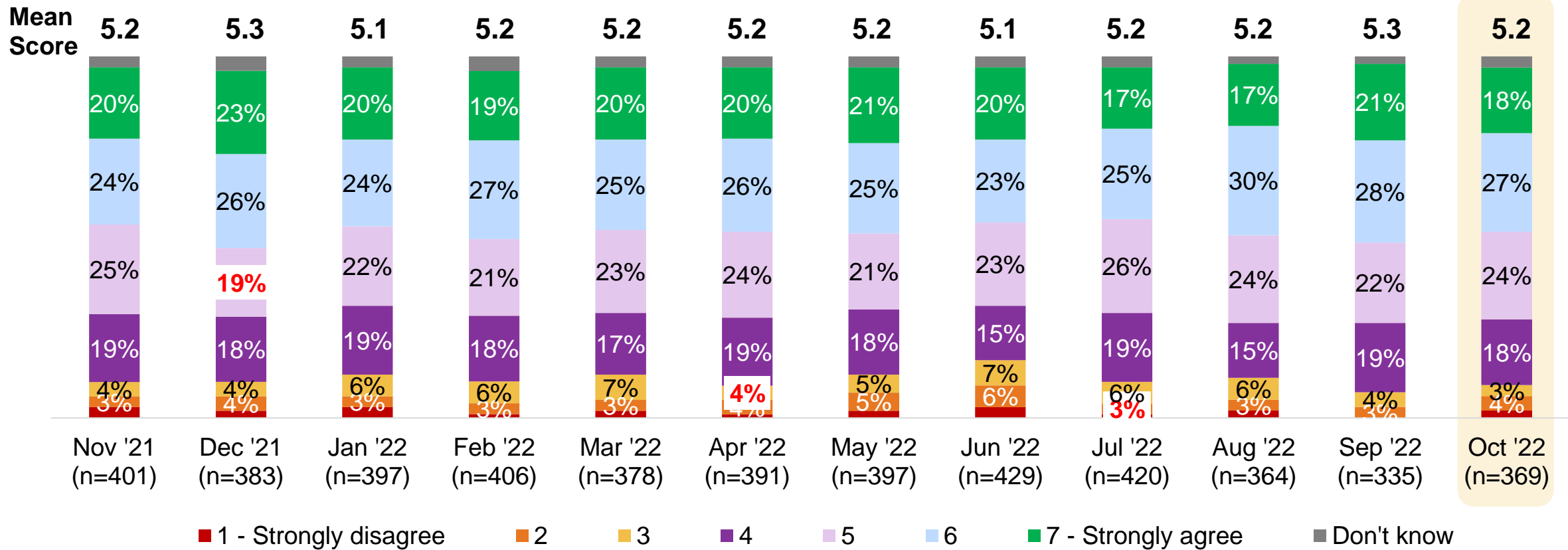
Q42: How much do you agree or disagree with each of the following statements?

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

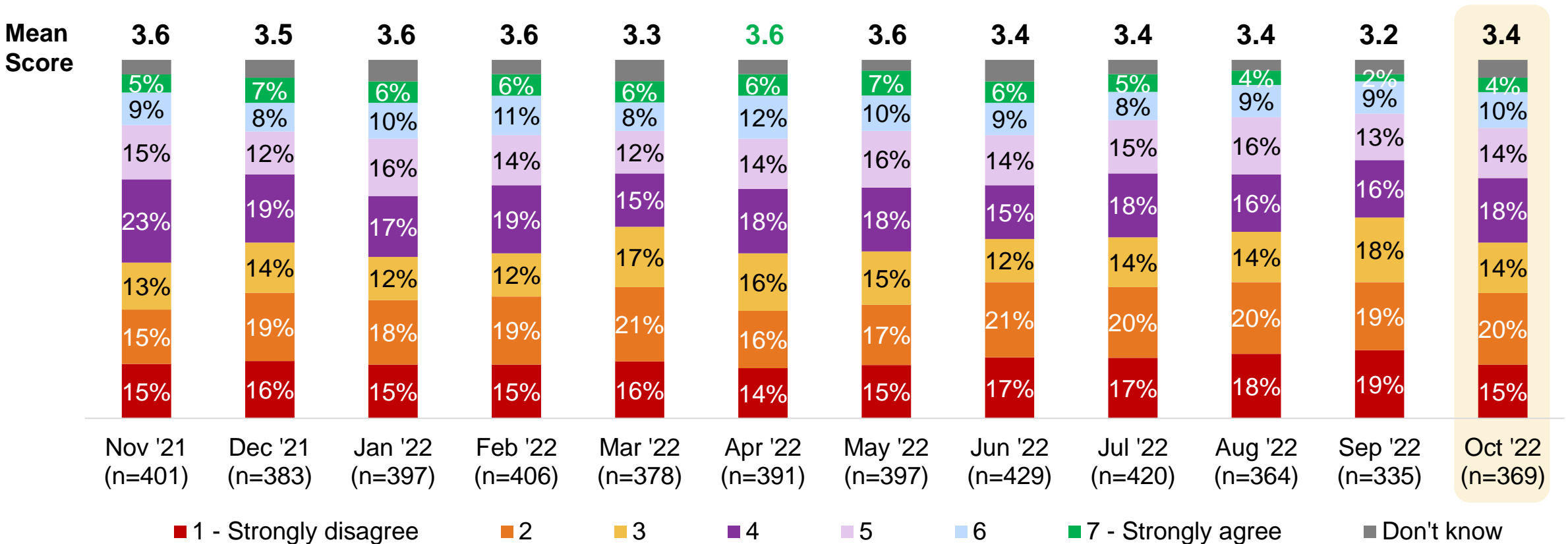
Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place

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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 negative effects for *river / lake* communities, while *bush / forest* and *heritage* communities tend to be more neutral.

		Mean*					
		Total	 Beach / Coast	 River / Lakes	 Bush / Forest	 Back-Country	 Heritage Place
		n=	1,776	596	1,042	546	710
Positive Effects	Visitors to this Protected Natural Area improve the local economy	5.2	5.3	5.3	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	4.8	4.8	4.7	5.0
	Visitors to this Protected Natural Area improve the quality of life of the local communities	4.7	4.7	4.9	4.6	4.8	4.8
	AVERAGE AGREEMENT WITH POSITIVE STATEMENTS (<i>higher numbers are better</i>)	4.9	4.9	5.1	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	3.9	3.2	3.6	3.5
	Visitors to this Protected Natural Area weaken the local communities' traditions & cultures	3.4	3.4	3.8	3.1	3.4	3.4
	AVERAGE AGREEMENT WITH NEGATIVE STATEMENTS (<i>lower numbers are better</i>)	3.7	3.7	4.0	3.4	3.8	3.6

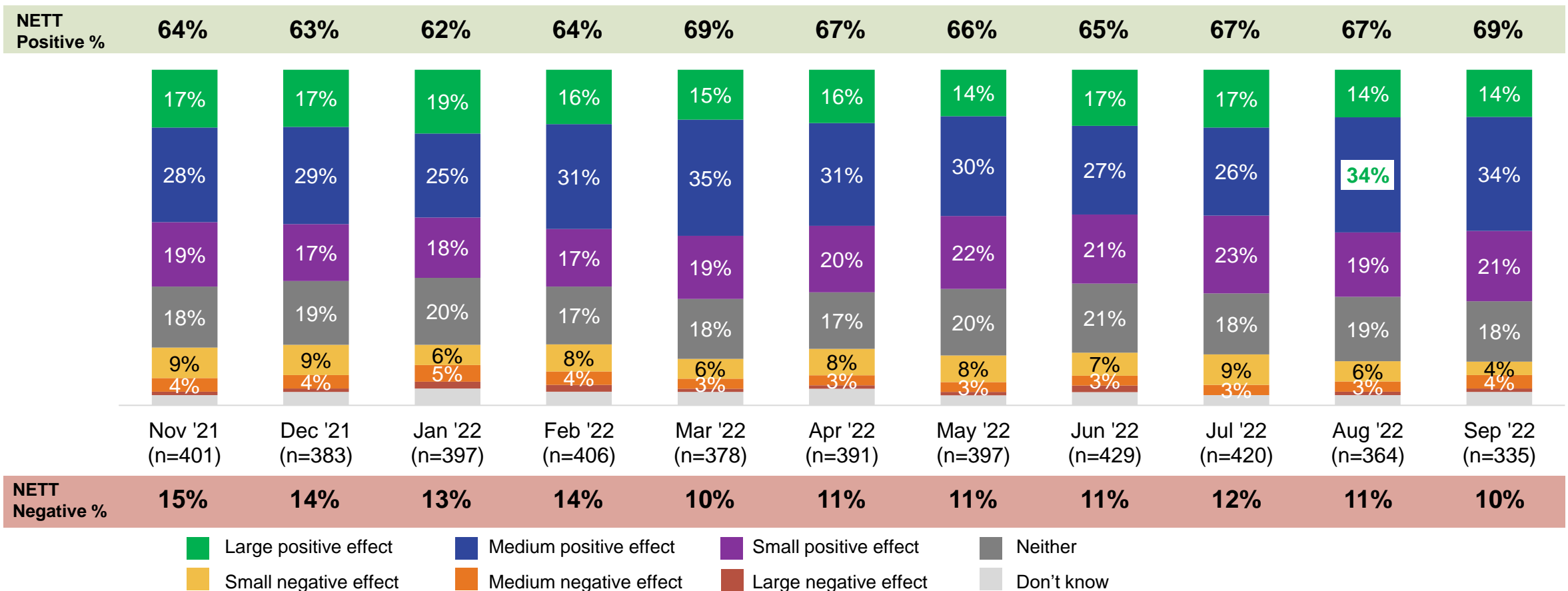
Green / red indicates significantly higher / lower than total

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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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
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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

