

DOC PUBLIC PULSE OF CONSERVATION

Monthly Topline Report – July 2022

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26 July, 2022



GAME CHANGERS



KEY FINDINGS – JULY '22

- This month, visitor frequency for Protected Areas (1.8) and Heritage Places (1.0) remained high. The average number of people visiting a Protected Area was higher than a year ago (1.6).
- The number of New Zealanders visiting at least one Protected Area (49%) or Heritage Place (34%) in the past month remained similar to June.
- Younger New Zealanders (18–34) and Māori continue to have the highest visitation rates to both Protected Areas and Heritage Places.
- This month there was a small deterioration in Protected Areas' visitor experience, with the management of visitor impacts, overall satisfaction and NPS all falling. Although poor winter weather could contribute to this, the levels are generally lower than for the last winter.
- In contrast, the measures for Heritage Places all improved from last month.
- People who live near or regularly visit river / lake areas are more likely to see more negative effects, while those who live near or regularly visit bush / forest areas see fewer negative and positive effects.



SUMMARY


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

BACKGROUND & METHODOLOGY




Sample size

1,000




Fieldwork dates
July 4–13, 2022

Interview duration
4 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.

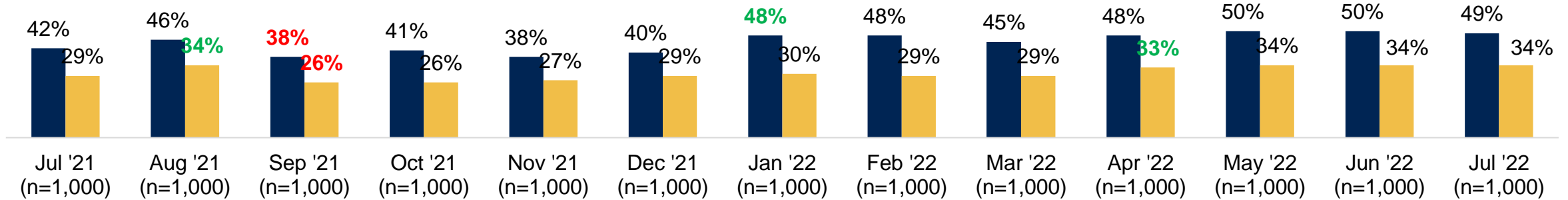
Previous waves

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

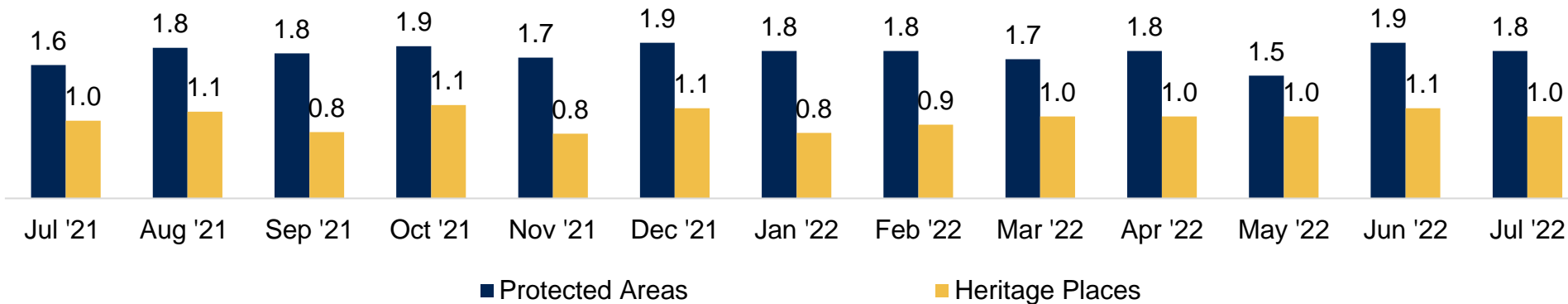
VISITATION FREQUENCY

VISIT FREQUENCY FOR PROTECTED & HERITAGE AREAS REMAINS HIGHER THAN A YEAR AGO. YOUNG & MĀORI PEOPLE VISIT MOST.

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



Average number of visits in the last month*



Demographic differences (July)**

Category	Protected Areas	Heritage Places
Māori	3.8	2.5
18–34 years	3.2	1.9
50–64 years	0.9	0.7
65+ years	0.5	0.4

**Note: Significant differences versus total.

Q6a: How many times, if any, have you visited any of New Zealand's protected areas within the last month? / Q18a: How many times, if any, have you visited any of New Zealand's heritage places within the last month? *Note: 'Unsure' responses are excluded. Bases vary for Protected Areas and Heritage Places. **Note: Significant differences versus total.

Green / red indicates significantly higher / lower than previous month

TOP-10 PROTECTED AREAS VISITED: JUN 2021–JUL 2022

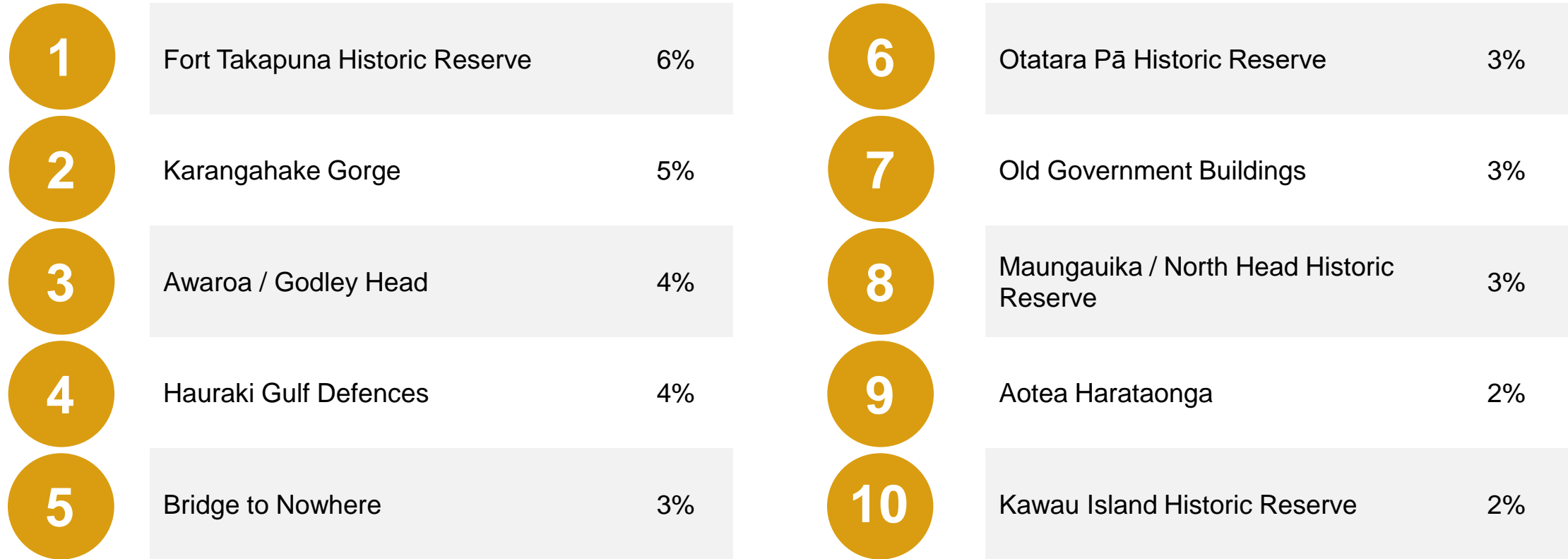
1	Waiheke Island	6%
2	Long Bay-Okura Marine Reserve	5%
3	Rangitoto Island	3%
4	Taranaki / Egmont National Park	2%
5	Remutaka Forest Park	2%

6	Hamner Forest Park	▲ 2%
7	Huka Falls Scenic Reserve	▼ 2%
8	Arthur's Pass National Park	2%
9	Abel Tasman National Park	2%
10	Tongariro National Park	2%

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

Base: Those who have visited a Protected Area (n=6,233)

TOP-10 HERITAGE PLACES VISITED: JUN 2021–JUL 2022



Q20: Which of these heritage places did you visit most recently? Select the location that is strongest in your memory.

Base: Those who have visited a Heritage Place (n=4,210)

SHORT WALKS & SIGHTSEEING REMAIN THE MOST COMMON ACTIVITIES AT PROTECTED AREAS; DAY WALKS HAVE DECREASED, POSSIBLY DUE TO THE POOR WINTER WEATHER.

Top activities when visiting Protected 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
Base (n=)	6,233	392	422	464	380	407	379	401	478	477	450	484	504	498	492
Short walk (<3 hours)	37%	37%	38%	36%	38%	35%	33%	33%	41%	33%	41%	38%	38%	38%	38%
Sightseeing	29%	29%	28%	29%	32%	29%	29%	24%	31%	27%	30%	30%	32%	31%	30%
Connecting with nature	22%	22%	21%	25%	22%	17%	25%	21%	21%	21%	24%	24%	25%	25%	26%
Bird / wildlife watching	25%	25%	27%	28%	24%	26%	26%	24%	22%	20%	24%	25%	24%	24%	25%
Photography	24%	25%	29%	26%	26%	21%	22%	21%	24%	24%	27%	24%	25%	24%	25%
Day walk / hike (>3 hours but not overnight)	23%	25%	25%	23%	26%	21%	25%	26%	22%	21%	20%	24%	21%	26%	21%
Picnic, barbeque, etc	20%	20%	21%	17%	19%	17%	20%	19%	22%	21%	22%	22%	18%	19%	20%
Connecting with history	13%	10%	13%	14%	14%	11%	17%	10%	12%	11%	16%	14%	14%	13%	13%
Connecting with culture	10%	8%	9%	11%	11%	8%	11%	12%	10%	11%	10%	10%	12%	7%	11%
Camping	14%	15%	14%	12%	14%	14%	14%	12%	16%	14%	13%	12%	11%	11%	11%
Boating / sailing	9%	9%	9%	10%	5%	8%	8%	8%	10%	10%	10%	9%	9%	8%	8%

Green / red indicates significantly higher / lower than previous month

Demographic differences (July)

Age:

New Zealanders aged 18–34 are less likely to go on a short walk (26%) and go sightseeing (22%).

New Zealanders aged 50–64** are more likely to go on a short walk (53%) and less likely to go sightseeing (22%).

New Zealanders aged 35–49 are more likely to connect with nature (37%).

Gender:

Men are less likely to go on a short walk (29%) compared to women (46%).

Ethnicity:

Asians** are more likely to connect with culture (20%).

Māori** are more likely to go camping (19%) and less likely to go sightseeing (18%).

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 Area in the last month. *Note: Only activities 7% and above for current month displayed. **Caution: Low base size (n<100), results indicative only.

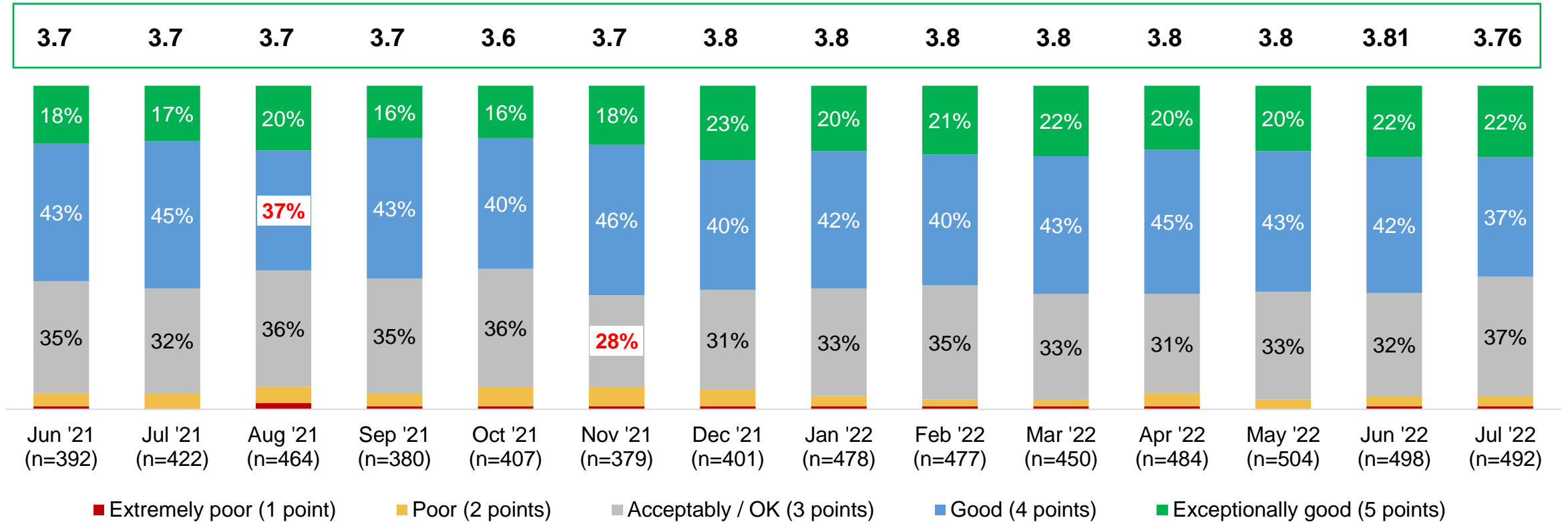
VISITOR IMPACT

SATISFACTION WITH VISITOR IMPACT MANAGEMENT HAS DECREASED MARGINALLY DUE TO A 5-POINT DROP IN 'GOOD' RATINGS.

Green / red indicates significantly higher / lower than previous month

Mean Score

Protected Areas – Management of Visitor Impact



Q14: Overall, how well do you think the impact of visitors were being managed at <LOCATION SELECTED IN Q8>?

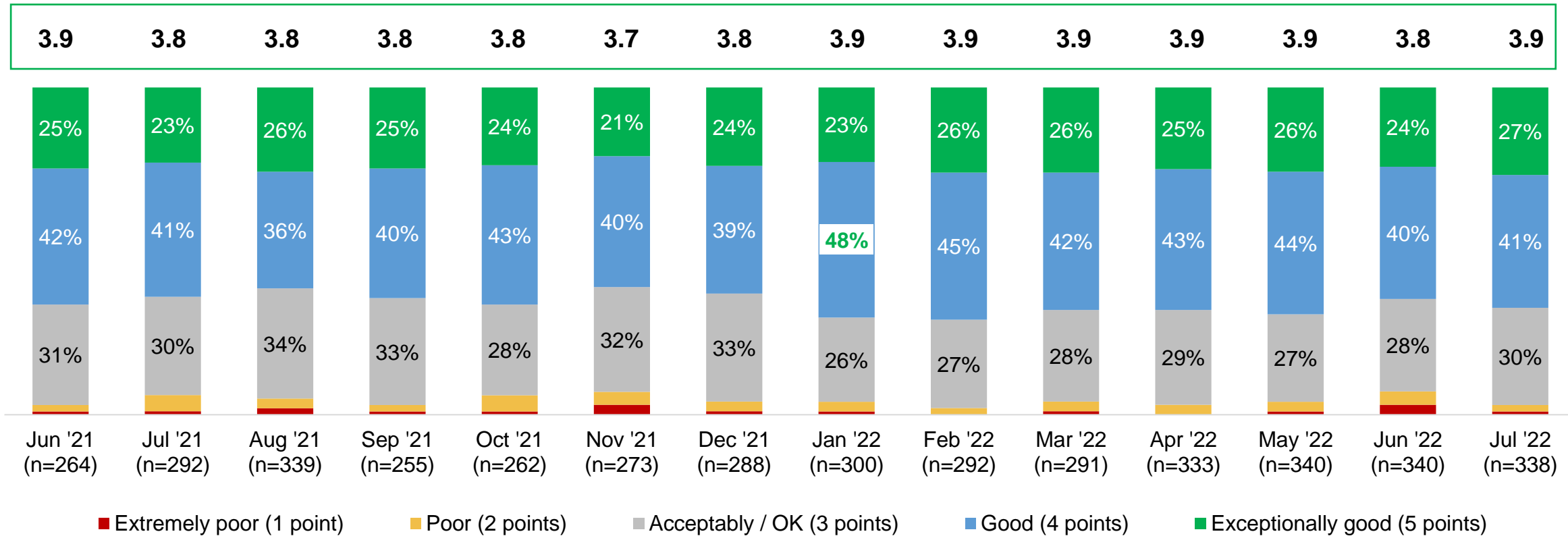
Base: Those who visited a Protected Area in the last month

SATISFACTION WITH VISITOR IMPACT MANAGEMENT AT HERITAGE PLACES HAS RECOVERED FROM ITS SMALL DECREASE LAST MONTH.

Green / red indicates significantly higher / lower than previous month

Mean Score

Heritage Places – Management of Visitor Impact

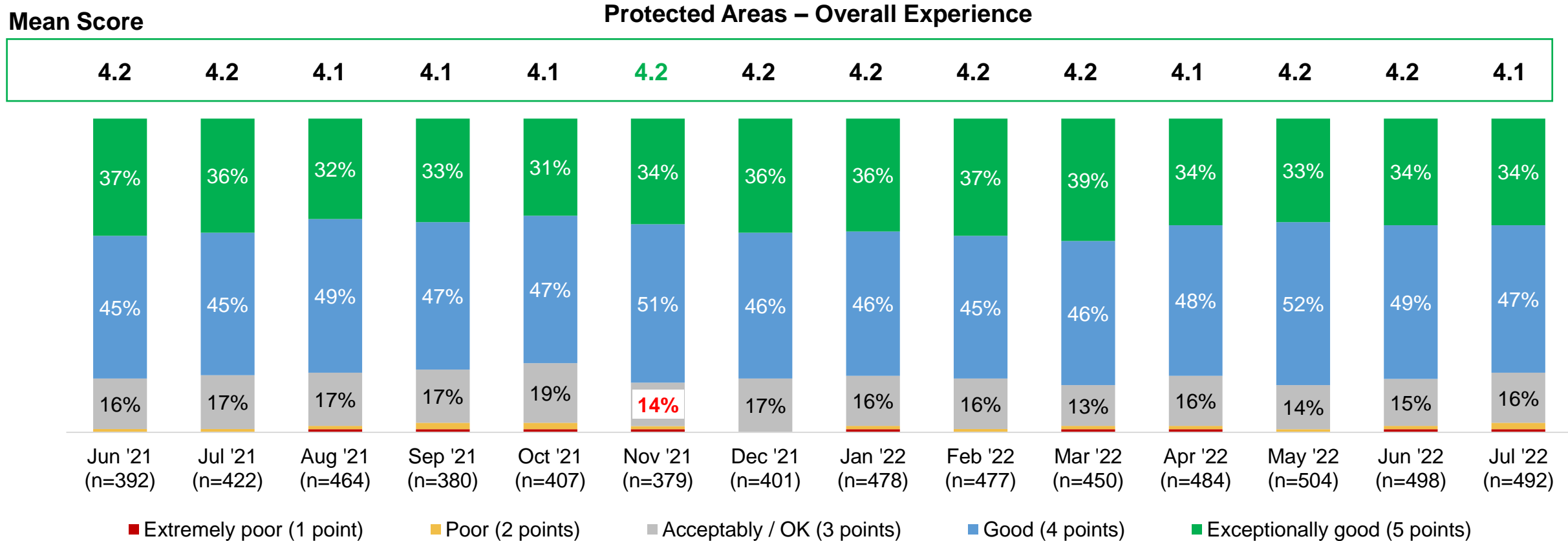


Q26: Overall, how well do you think the impact of visitors were being managed at <LOCATION SELECTED IN Q20>?

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

VISIT SATISFACTION

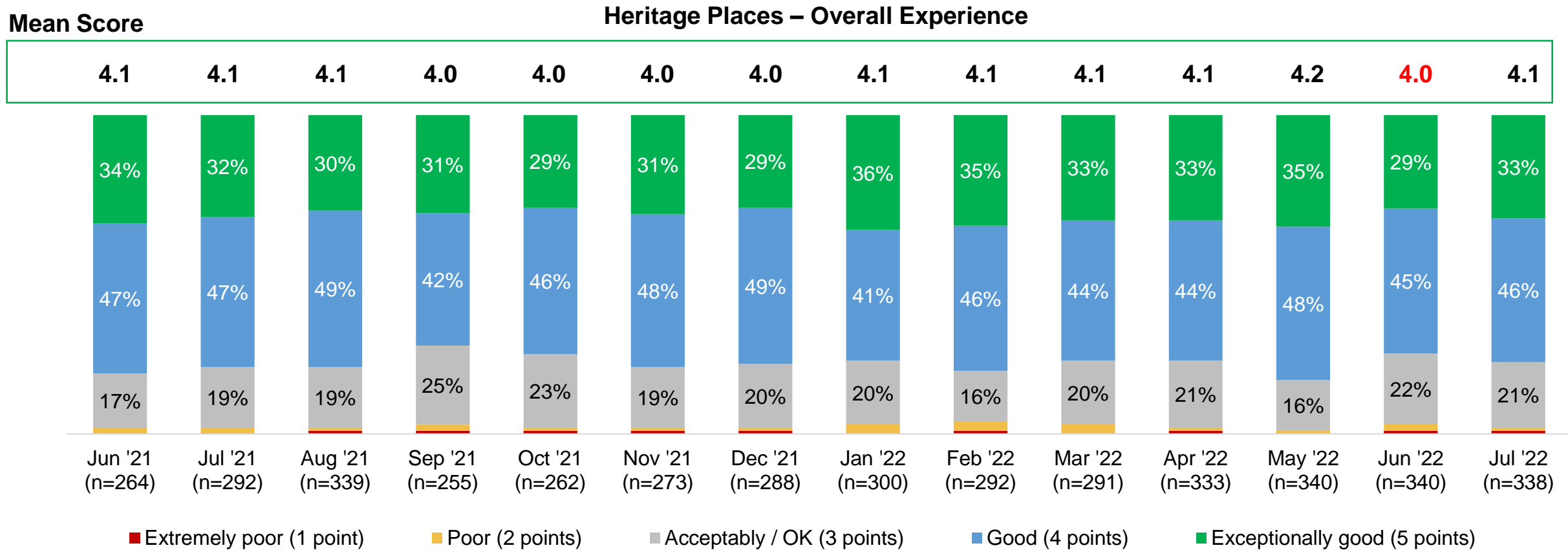
IN LINE WITH THE DROP IN VISITOR MANAGEMENT SATISFACTION, VISITORS' OVERALL EXPERIENCE AT PROTECTED AREAS HAS ALSO FALLEN SLIGHTLY.



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

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

IMPROVED VISITOR MANAGEMENT IS REFLECTED IN THE INCREASES IN POSITIVE SCORES FROM HERITAGE PLACES' VISITORS.



Green / red indicates significantly higher / lower than previous month

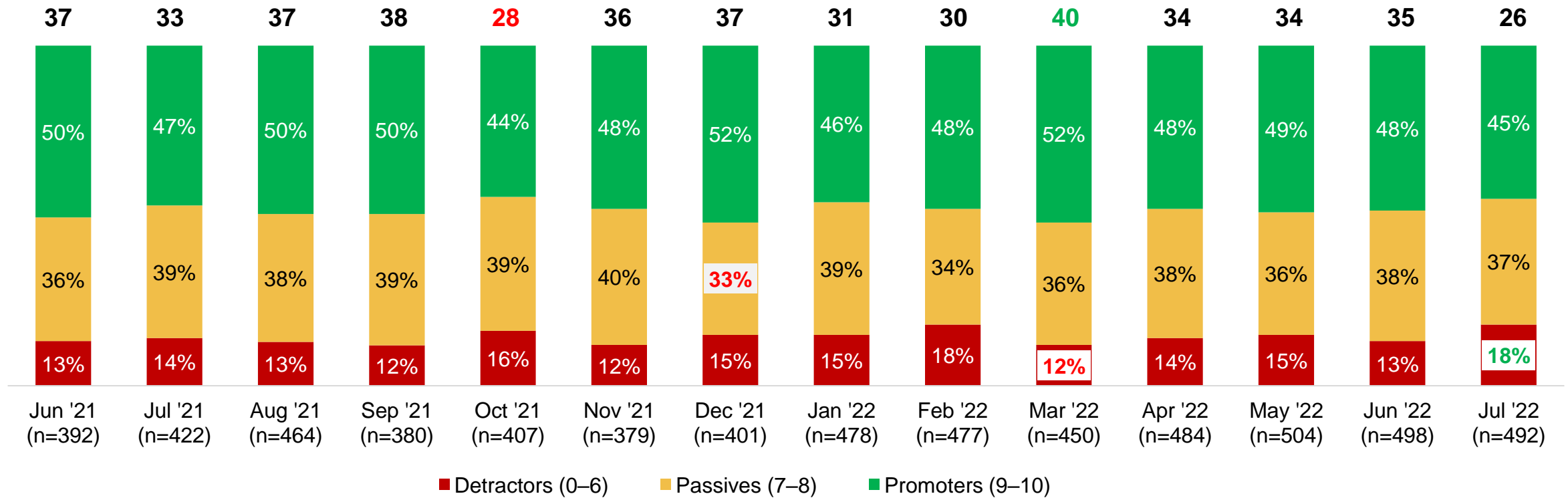
Q27: Overall, how would you rate your experience at <LOCATION SELECTED IN Q20>?

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

NPS

PROTECTED AREAS' NPS HAS FALLEN TO ITS LOWEST LEVEL SINCE TRACKING BEGAN; THIS CAN BE ATTRIBUTED TO A SIGNIFICANT INCREASE IN THE NUMBER OF DETRACTOR RATINGS.

Protected Areas – NPS



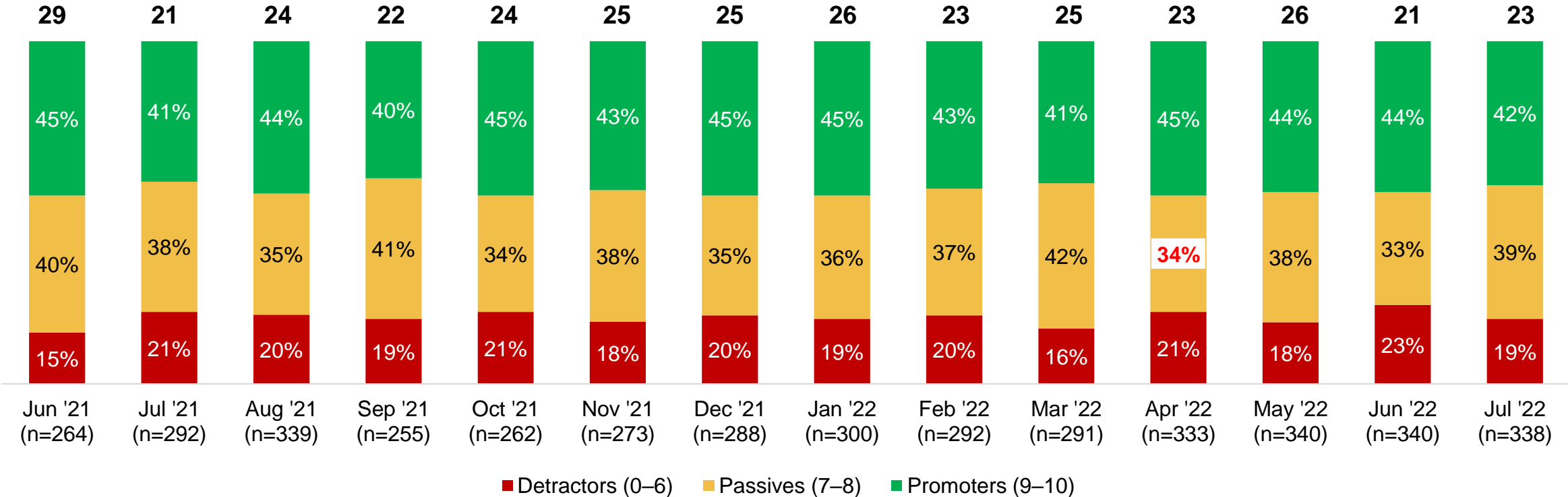
Green / red indicates significantly higher / lower than previous month

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

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

HERITAGE PLACES' NPS HAS INCREASED FROM LAST MONTH DUE TO A SHIFT FROM DETRACTOR TO PASSIVE RATINGS.

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?

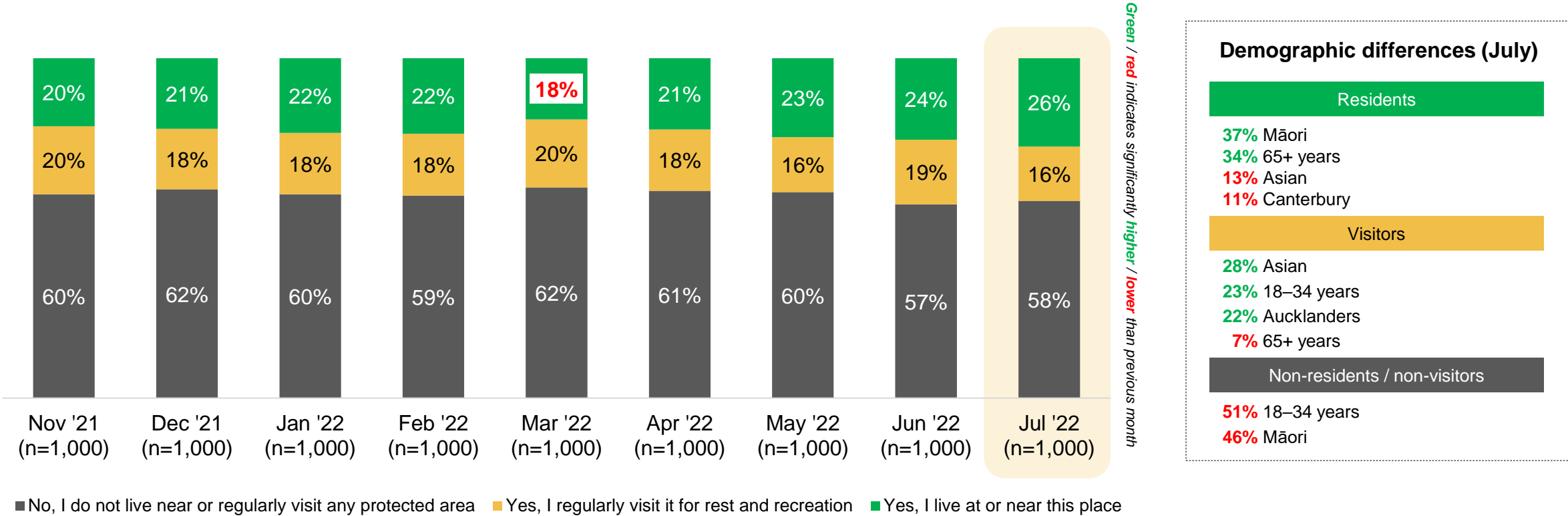
Base: Those who visited a Heritage Place in the last month



‘THRIVE’ MODULE

2 IN 5 NEW ZEALANDERS LIVE AT / NEAR A PROTECTED AREA THAT IS IMPORTANT TO THEM OR REGULARLY VISIT SUCH A PLACE.

Is there a Protected Area in New Zealand that is especially important to you?

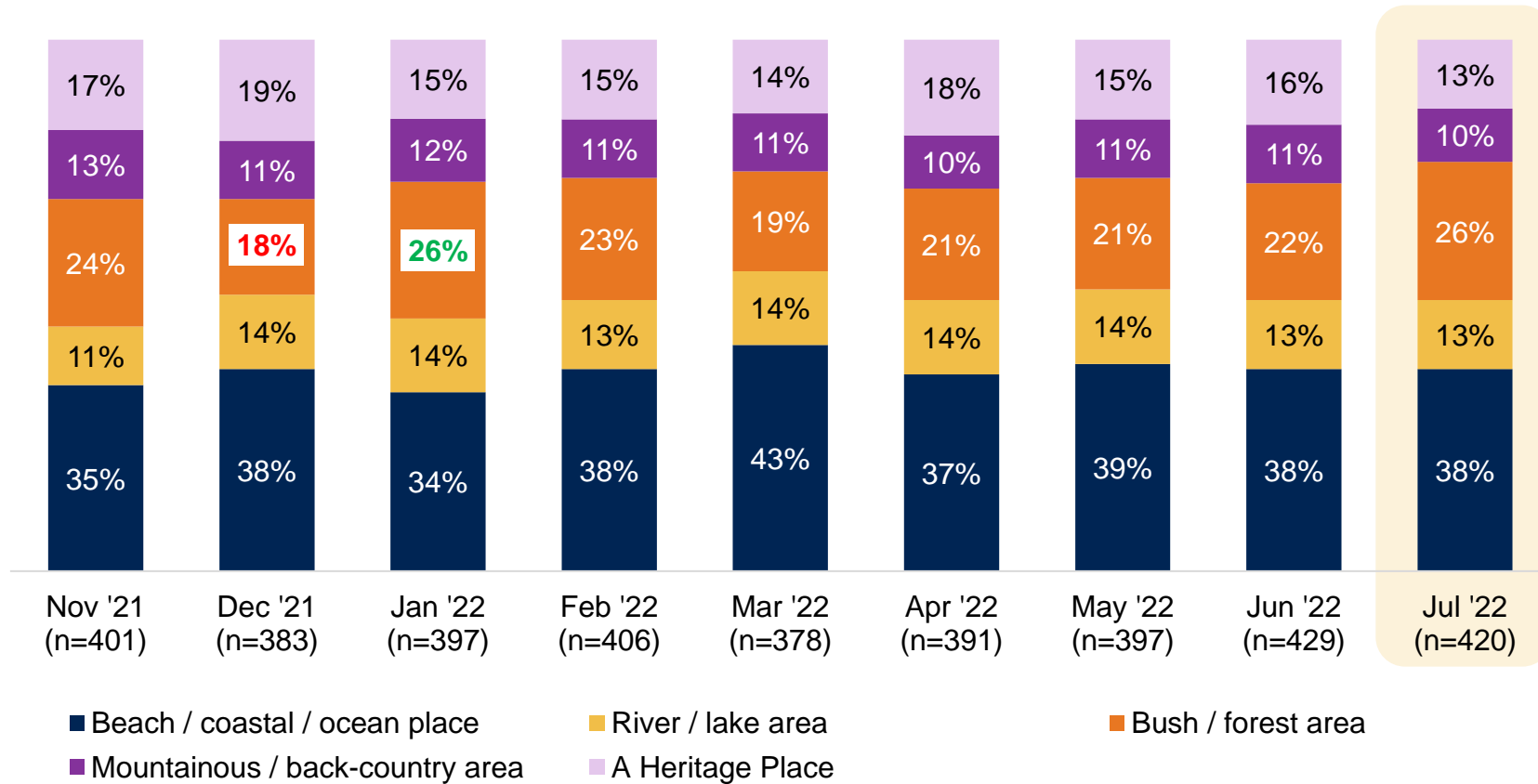


Q40: Is there a protected area in New Zealand that is especially important to you? If there is more than one such place, please think about the place that is the MOST important to you.

Base: Total sample

THE PLACES THAT ARE IMPORTANT TO PEOPLE TEND TO BE CLOSE TO THE WATER.

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



Green / red indicates significantly higher / lower than previous month

Demographic profile (total n=3,602)

Beach / coastal area

- 44% Auckland
- 43% 50–64 years
- 30% Māori
- 24% Waikato

River / lake area

- 20% Bay of Plenty
- 20% Waikato
- 17% Canterbury
- 8% Auckland

Bush / forest

- 32% Wellington
- 30% Waikato
- 20% Auckland
- 17% Bay of Plenty
- 17% Asian

Mountainous / back-country area

- 17% Otago
- 13% 18–34 years
- 8% 50–64 years

Heritage place

- 26% Māori
- 18% Auckland
- 14% European
- 11% Wellington
- 9% Otago

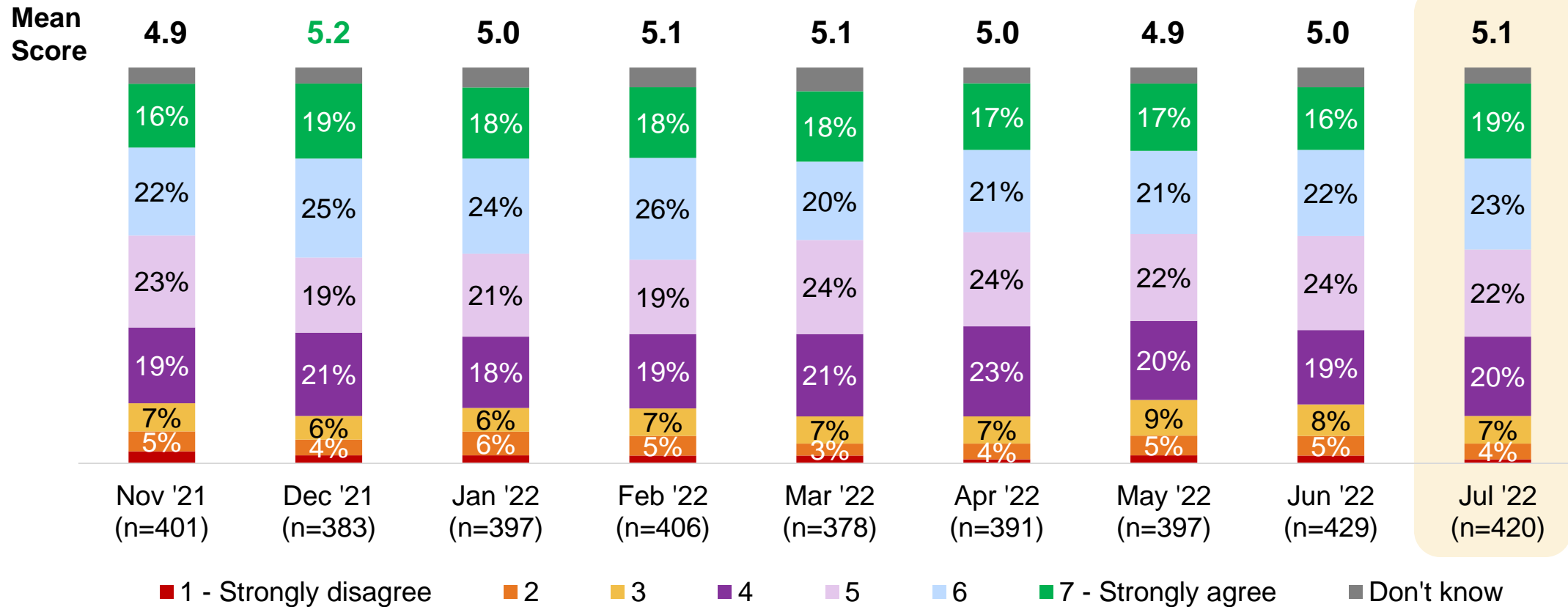
Green / red (demographics) indicates significantly higher / lower than total

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

Base: Those who live near or regularly visit this place

ENABLING LOCAL STORIES, IDENTITIES & TRADITIONS TO BE SHARED BETWEEN VISITORS & LOCALS IS STILL PERCEIVED AS POSITIVE.

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



Green / red indicates significantly higher / lower than previous month

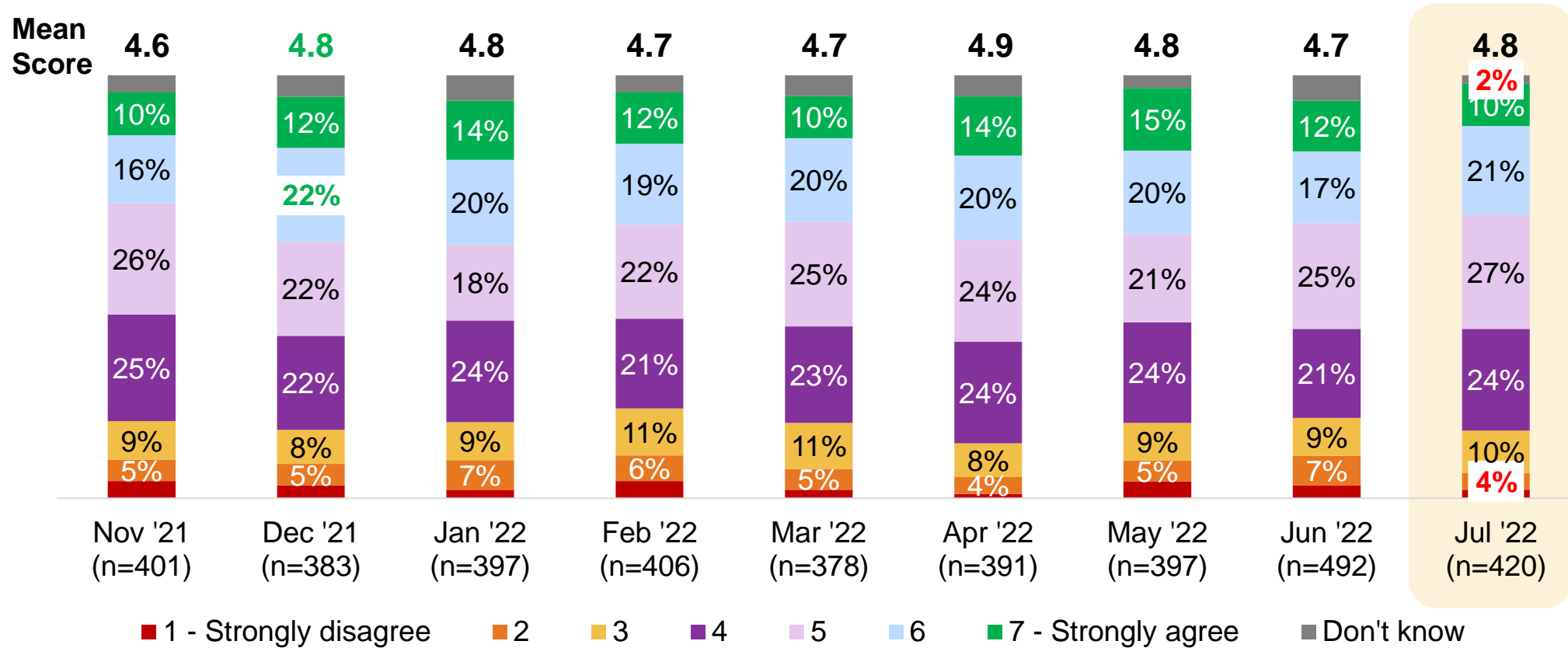
Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place

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THERE IS STILL WIDE AGREEMENT THAT VISITORS IMPROVE THE QUALITY OF LIFE OF THE LOCAL COMMUNITIES.

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



Green / red indicates significantly higher / lower than previous month

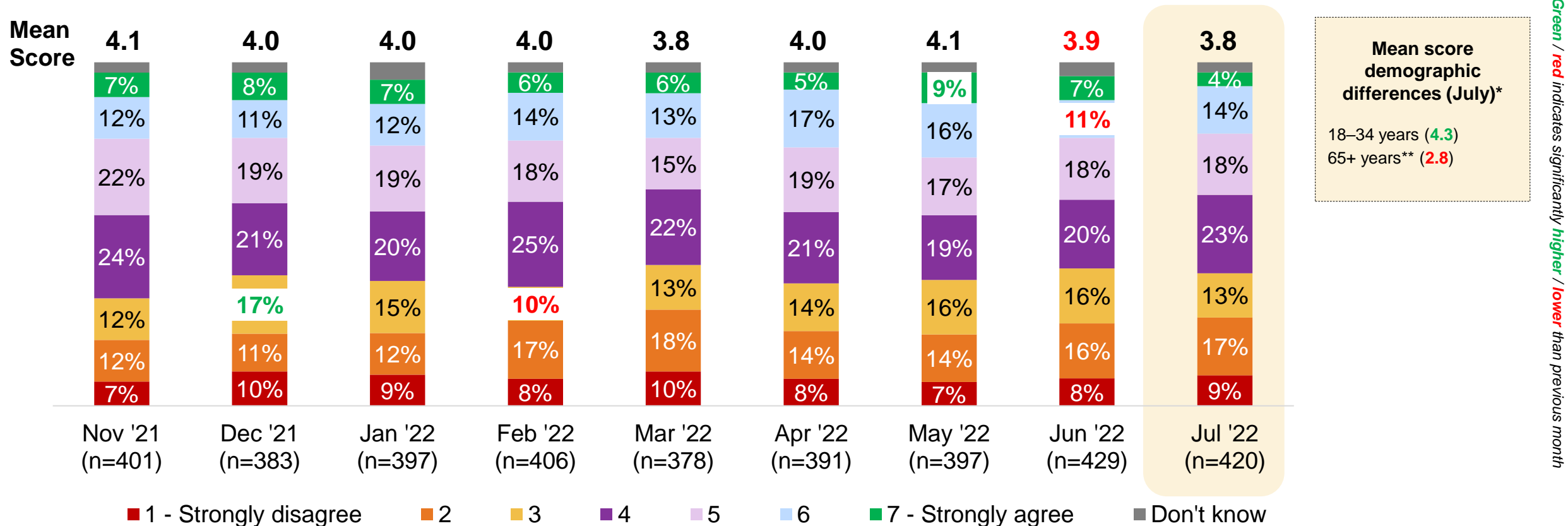
Q42: How much do you agree or disagree with each of the following statements?

Base: Those who live near or regularly visit this place

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THE PERCEIVED INCIDENCE OF VISITOR-CREATED DAMAGE TO THE AREA HAS CONTINUED TO FALL THIS MONTH.

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

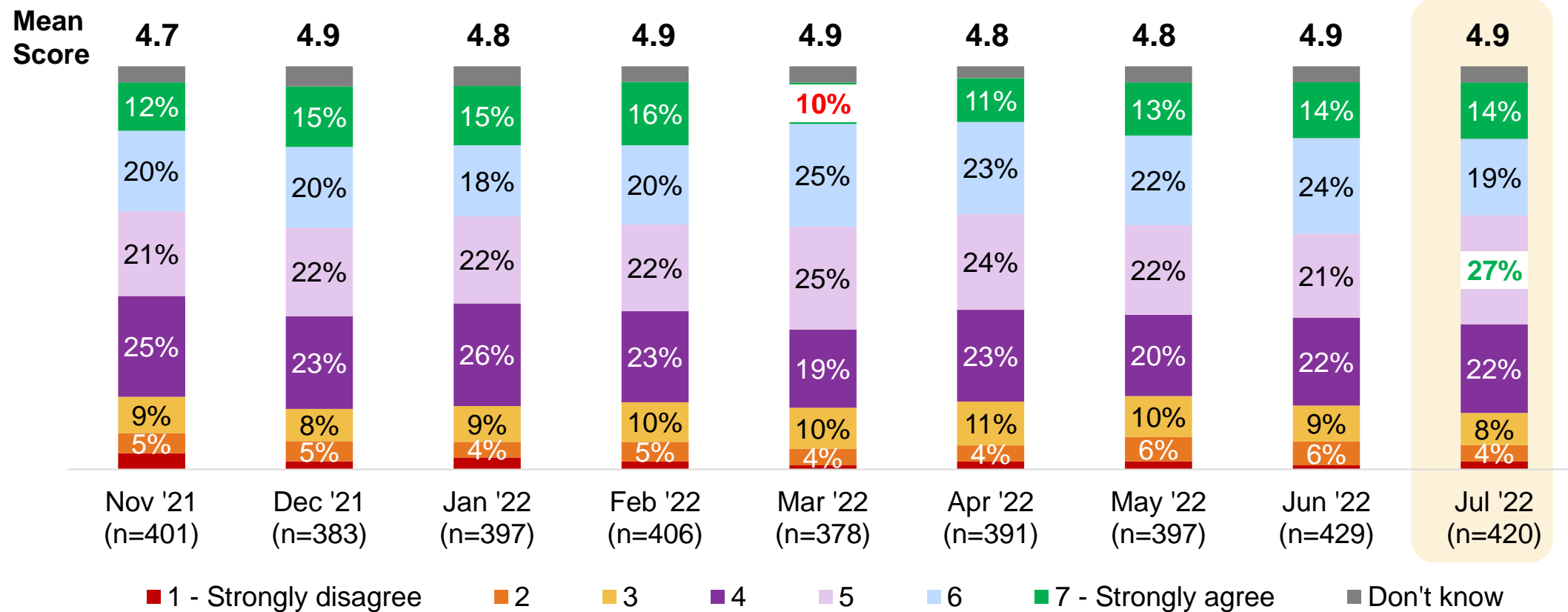


Q42: How much do you agree or disagree with each of the following statements?

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

COMPARED TO LAST MONTH, THERE IS SIGNIFICANTLY MORE NEUTRALITY REGARDING THE STATEMENT *VISITORS HELP ENSURE THESE AREAS ARE PROTECTED & IMPROVED*.

“Visitors to this Protected 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?

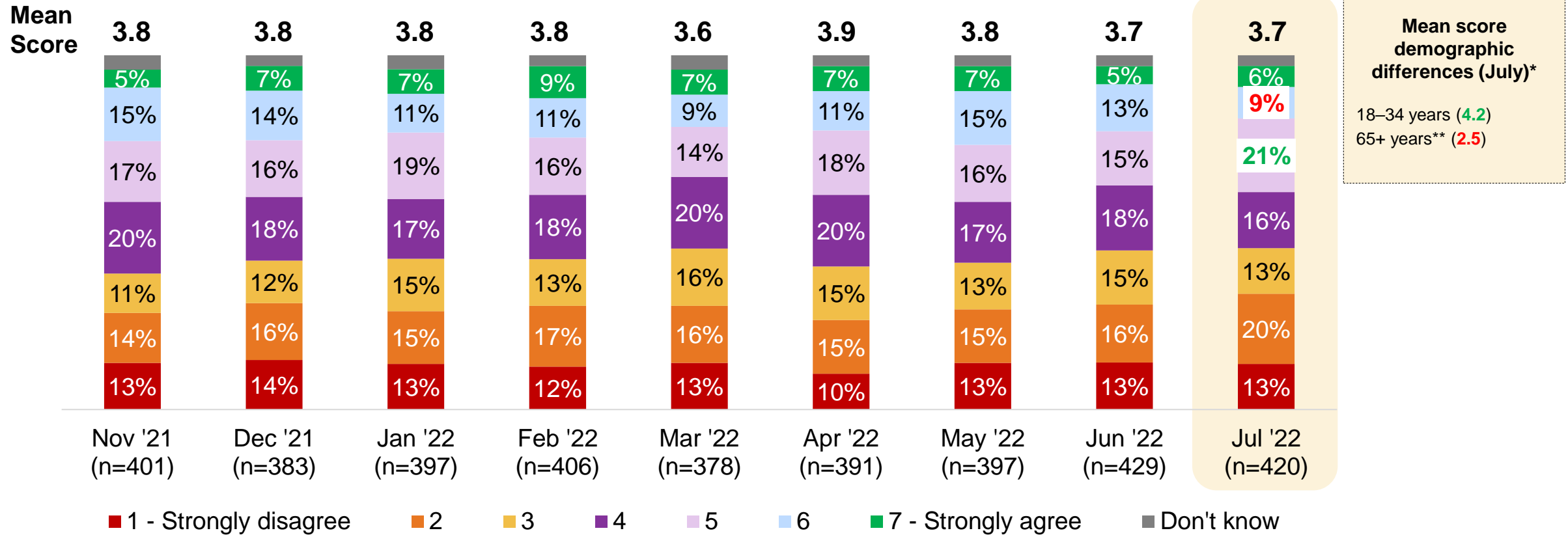
Base: Those who live near or regularly visit this place

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THERE IS A DIVIDE IN TERMS OF VISITORS' AFFECTING THE ATTRACTIVENESS OF THE PROTECTED AREA NEGATIVELY.

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

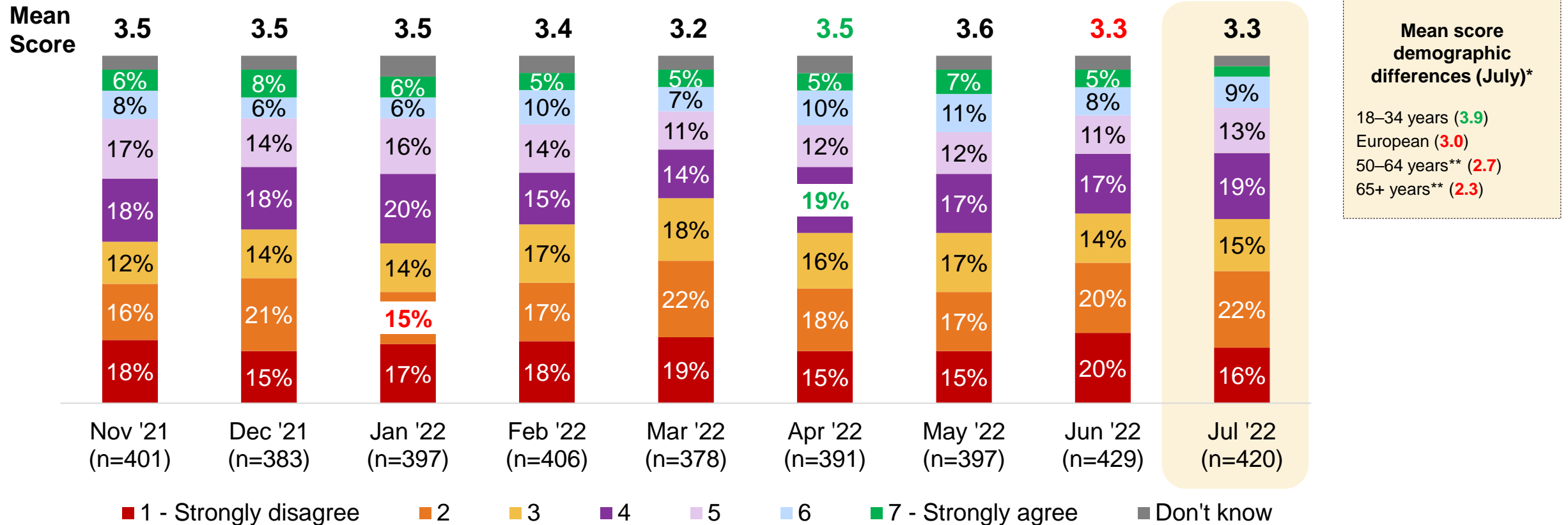


Q42: How much do you agree or disagree with each of the following statements?

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

VISITORS / RESIDENTS GENERALLY DISAGREE THAT VISITORS WEAKEN LOCAL TRADITIONS & CULTURES.

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

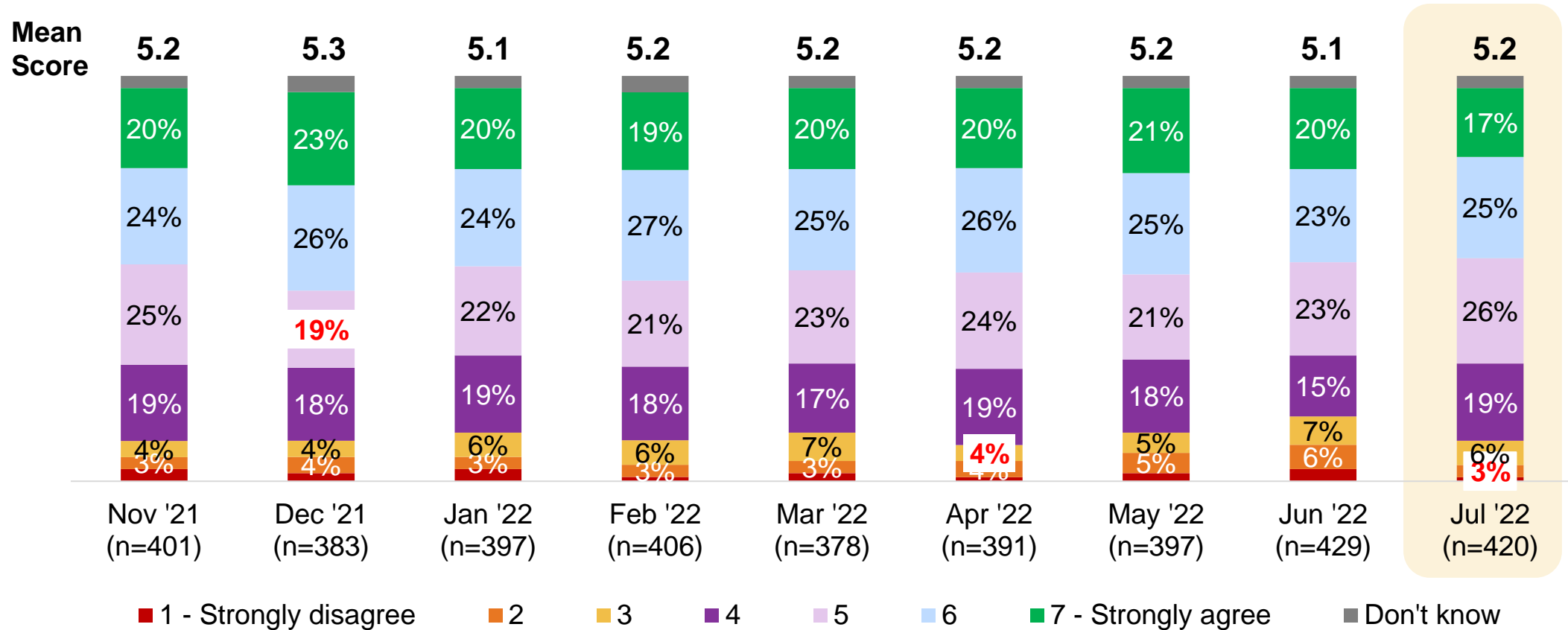


Q42: How much do you agree or disagree with each of the following statements?

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 VISITORS IMPROVE THE LOCAL ECONOMY.

“Visitors to this Protected Area improve the local economy”



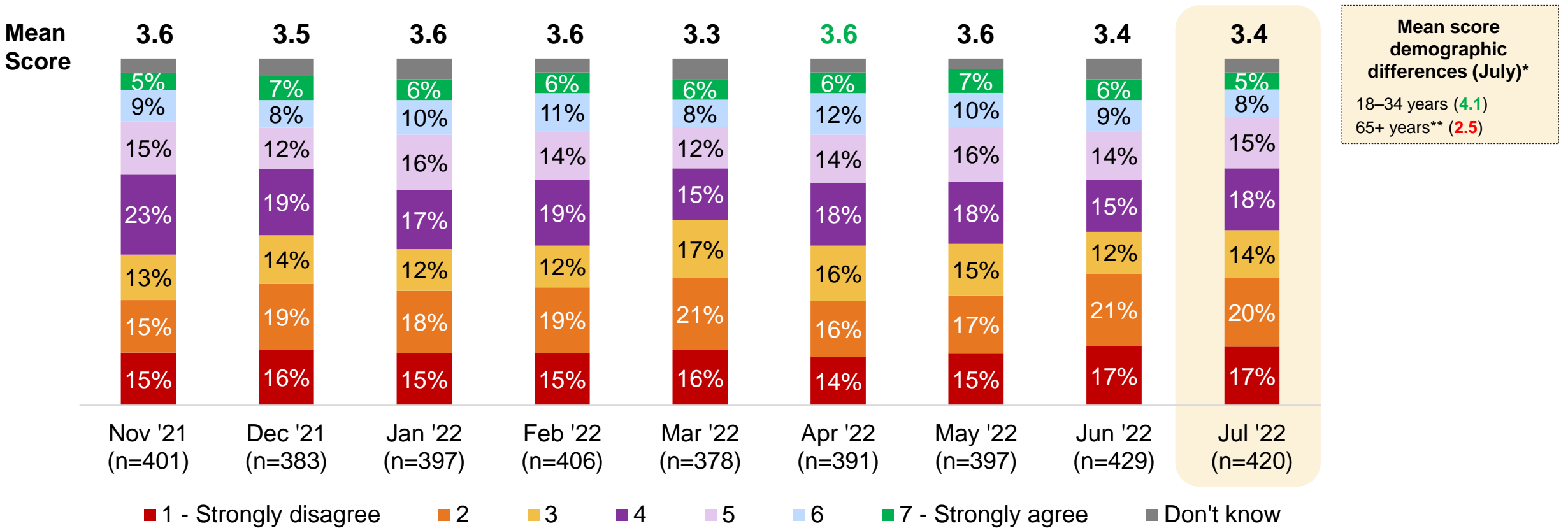
Green / red indicates significantly higher / lower than previous month

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

Base: Those who live near or regularly visit this place

MOST CONTINUE TO DISAGREE THAT VISITORS ADD UNWANTED FINANCIAL BURDENS TO LOCAL COMMUNITIES.






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



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* COMMUNITIES TEND TO BE MORE NEUTRAL.

		Mean*						
								
		Beach / Coast	River / Lakes	Bush / Forest	Back-Country	Heritage Place		
		n=	Total	1,363	470	805	399	565
Positive Effects	Visitors to this protected area improve the local economy	5.2	5.3	5.3	5.0	5.2	5.1	
	Visitors to this protected area enable stories, identities & traditions to be shared between visitors & local people	5.0	5.0	5.1	4.9	5.1	5.3	
	Visitors to this protected 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 area improve the quality of life of the local communities	4.7	4.7	5.0	4.6	4.9	4.8	
	AVERAGE AGREEMENT WITH POSITIVE STATEMENTS (<i>higher numbers are better</i>)	4.9	5.0	5.1	4.8	5.0	5.1	
Negative Effects	This protected area is damaged by the activities resulting from these visitors	4.0	4.0	4.2	3.8	4.1	3.8	
	Visitors to this protected area make it less attractive for local people to visit the protected area	3.8	3.9	4.1	3.4	3.9	3.6	
	Visitors to this protected area add unwanted financial burdens onto the local communities	3.5	3.5	3.9	3.2	3.7	3.5	
	Visitors to this protected area weaken the local communities' traditions & cultures	3.4	3.4	3.9	3.1	3.5	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	

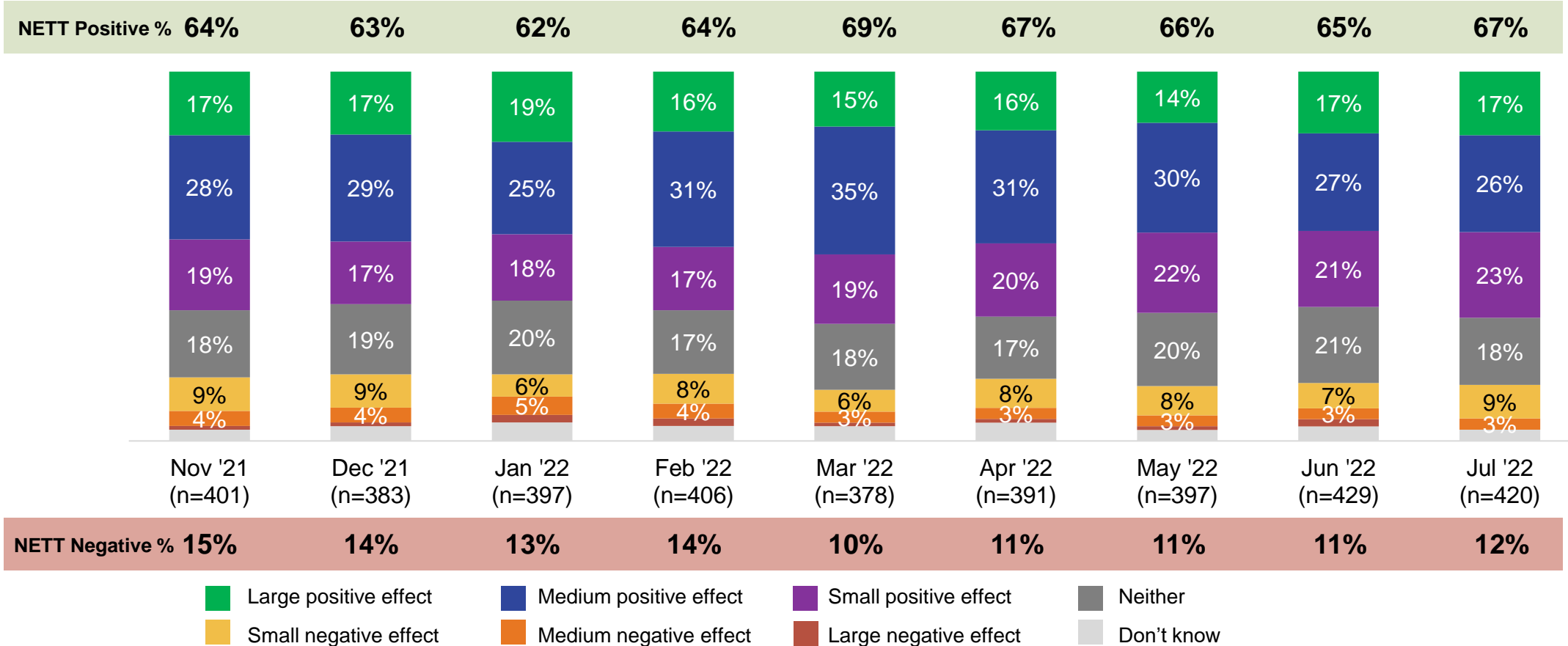
Green / red indicates significantly higher / lower than total

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 CONTINUE TO 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 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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GAME CHANGERS

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**THANK
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