# DOC PUBLIC PULSE OF CONSERVATION

## Monthly Topline Report – November 2022

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29 November, 2022

GAME CHANGERS

# KEY FINDINGS – NOVEMBER '22

- There has been an overall increase in visits to DOC-managed places, with satisfaction and related measures all improving.

- The average number of visits to Protected Natural Areas in the last month has risen to 2.2. This is the highest recorded since tracking began (which was after COVID-19 began).

- Protected Heritage Places' NPS has significantly increased, as has satisfaction with the overall experience at Protected Heritage Places. This reflects a large increase in those having a 'exceptionally good' experience.

- Visitor satisfaction at Protected Heritage Places for facilities and in particular, signage/maintenance has increased.

- Protected Natural Areas' NPS has increased due to a decrease in Detractors.

- The main issues people recall from DOC relate to *predator and pest control* and *climate change,* followed closely by *Great Walks* and *general hut / campsite information.*

- *Friends / family / local people* are the most commonly used source of information used for planning visits to Protected Natural Areas, closely followed by weather forecasts.

- There has been a significant increase in the number of people who cite a *beach / coastal location* as being especially important to them. There has been a significant decrease of those saying the same about *bush / forest* locations.

# SUMMARY

1.  **Background & Methodology**

2.  **Visitation Frequency**

3.  **Visit Satisfaction**

4.  **NPS**

5.  **'Thrive' Module**

# BACKGROUND & METHODOLOGY

**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 |
| Oct 22 | 5-17 October, 2022 |

**Sample size**

# 1,000

**Fieldwork dates**
November 7-21, 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.

*Where results do not sum to 100 or the 'difference' appears to be +/-1 more/less than the actual, this may be due to rounding, multiple responses or the exclusion of 'don't know' or 'not stated' responses.*

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# DOC MEDIA PROFILE

# The main issues people recall from DOC relate to *predator and pest control* and *climate change,* followed closely by *Great Walks* and *general hut / campsite information.*
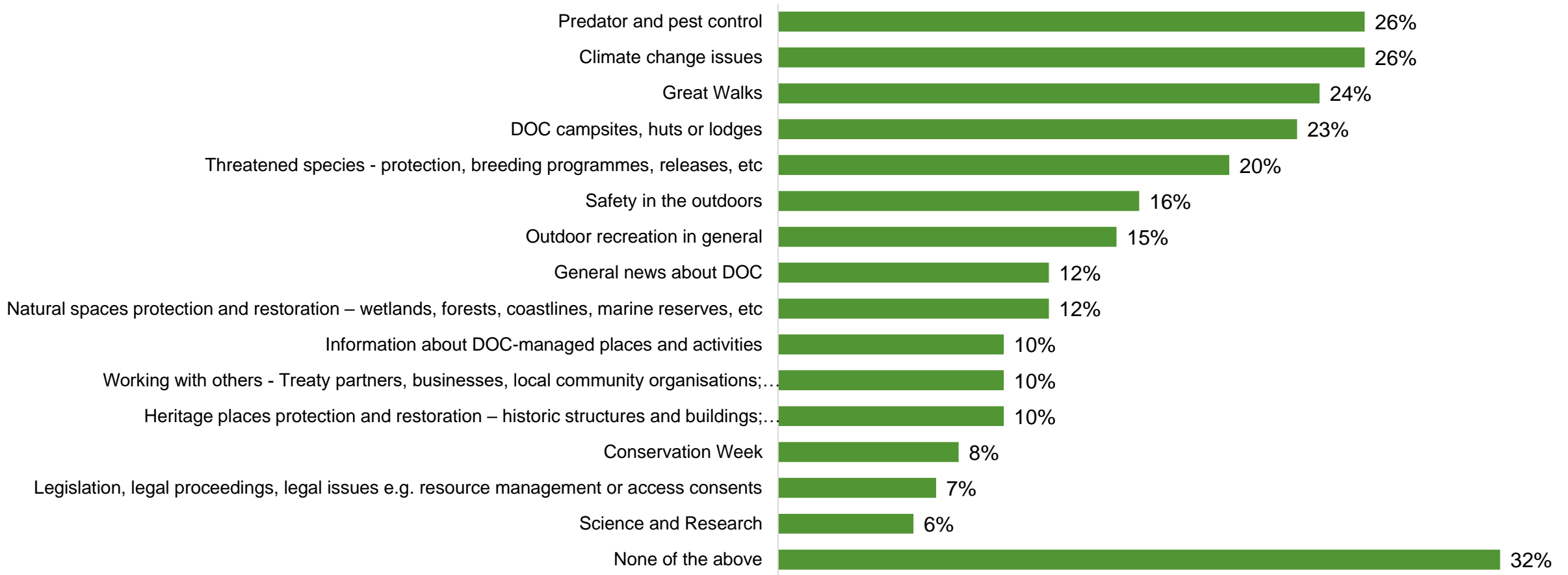
**Aspects of the Department of Conservation seen / read / heard about in the past 4 weeks**

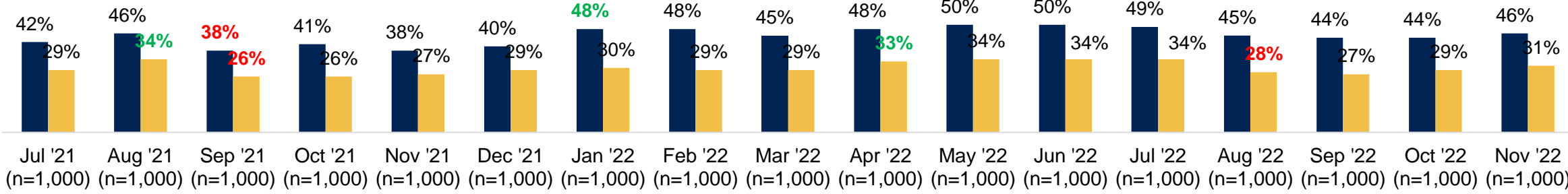| Aspect | % |
|---|---|
| Predator and pest control | 26% |
| Climate change issues | 26% |
| Great Walks | 24% |
| DOC campsites, huts or lodges | 23% |
| Threatened species - protection, breeding programmes, releases, etc | 20% |
| Safety in the outdoors | 16% |
| Outdoor recreation in general | 15% |
| General news about DOC | 12% |
| Natural spaces protection and restoration – wetlands, forests, coastlines, marine reserves, etc | 12% |
| Information about DOC-managed places and activities | 10% |
| Working with others - Treaty partners, businesses, local community organisations;… | 10% |
| Heritage places protection and restoration – historic structures and buildings;… | 10% |
| Conservation Week | 8% |
| Legislation, legal proceedings, legal issues e.g. resource management or access consents | 7% |
| Science and Research | 6% |
| None of the above | 32% |

*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?*
*Base: Total sample*

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# VISITATION FREQUENCY

# At 2.2, the average number of visits to Protected Natural Areas in the last month is the highest recorded since tracking began (which was after COVID-19 began).

## New Zealanders visiting at least one Protected Natural Area or Protected Heritage Place in the last month



| | Jul '21 (n=1,000) | Aug '21 (n=1,000) | Sep '21 (n=1,000) | Oct '21 (n=1,000) | Nov '21 (n=1,000) | Dec '21 (n=1,000) | Jan '22 (n=1,000) | Feb '22 (n=1,000) | Mar '22 (n=1,000) | Apr '22 (n=1,000) | May '22 (n=1,000) | Jun '22 (n=1,000) | Jul '22 (n=1,000) | Aug '22 (n=1,000) | Sep '22 (n=1,000) | Oct '22 (n=1,000) | Nov '22 (n=1,000) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Protected Areas | 42% | 46% | 38% | 41% | 38% | 40% | 48% | 48% | 45% | 48% | 50% | 50% | 49% | 45% | 44% | 44% | 46% |
| Heritage Places | 29% | 34% | 26% | 26% | 27% | 29% | 30% | 29% | 29% | 33% | 34% | 34% | 34% | 28% | 27% | 29% | 31% |

Green / red indicates significantly higher / lower than previous month

## Average number of visits in the last month*
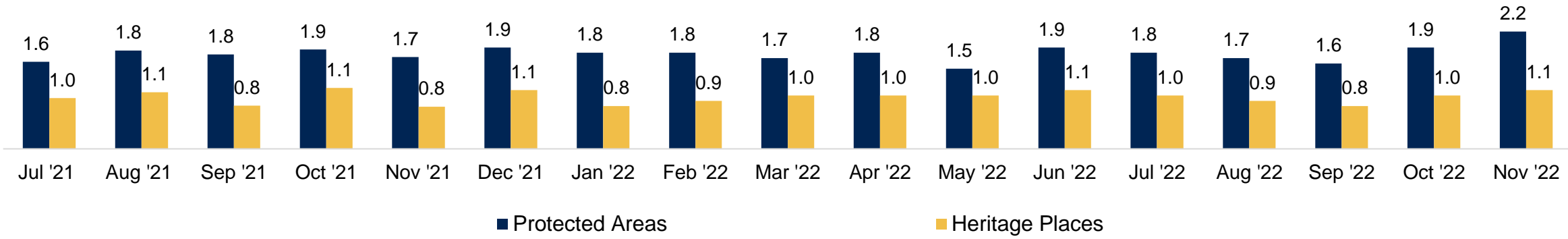


| | Jul '21 | Aug '21 | Sep '21 | Oct '21 | Nov '21 | Dec '21 | Jan '22 | Feb '22 | Mar '22 | Apr '22 | May '22 | Jun '22 | Jul '22 | Aug '22 | Sep '22 | Oct '22 | Nov '22 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Protected Areas | 1.6 | 1.8 | 1.8 | 1.9 | 1.7 | 1.9 | 1.8 | 1.8 | 1.7 | 1.8 | 1.5 | 1.9 | 1.8 | 1.7 | 1.6 | 1.9 | 2.2 |
| Heritage Places | 1.0 | 1.1 | 0.8 | 1.1 | 0.8 | 1.1 | 0.8 | 0.9 | 1.0 | 1.0 | 1.0 | 1.1 | 1.0 | 0.9 | 0.8 | 1.0 | 1.1 |

■ Protected Areas     ■ Heritage Places

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# TOP-10 PROTECTED NATURAL AREAS VISITED: JUN 2021–NOV 2022.

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

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

| | | |
|---|---|---|
| **6** | Huka Falls Scenic Reserve | 2% |
| **7** | Arthur's Pass National Park | 2% |
| **8** | Hawea National Park | 2% |
| **11=** | Abel Tasman National Park | 2% |
| | Silver Peaks Scenic Reserve ▲ | 2% |
| | Whangarei Harbour Marine Reserve ▲ | 2% |

**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=8,027)*

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# TOP-10 PROTECTED HERITAGE PLACES VISITED: JUN 2021–NOV 2022

**1** Fort Takapuna Historic Reserve — 6%

**2** Karangahake Gorge — 5%

**3** Awaroa / Godley Head — 5%

**4** Hauraki Gulf Defences — 4%

**5** Otatara Pā Historic Reserve — 3%

**6** Old Government Buildings ▲ — 3%

**7** Bridge to Nowhere — 3%

**8** Maungauika / North Head Historic Reserve — 3%

**9** Kawau Island Historic Reserve — 2%

**10** Aotea Harataonga — 2%
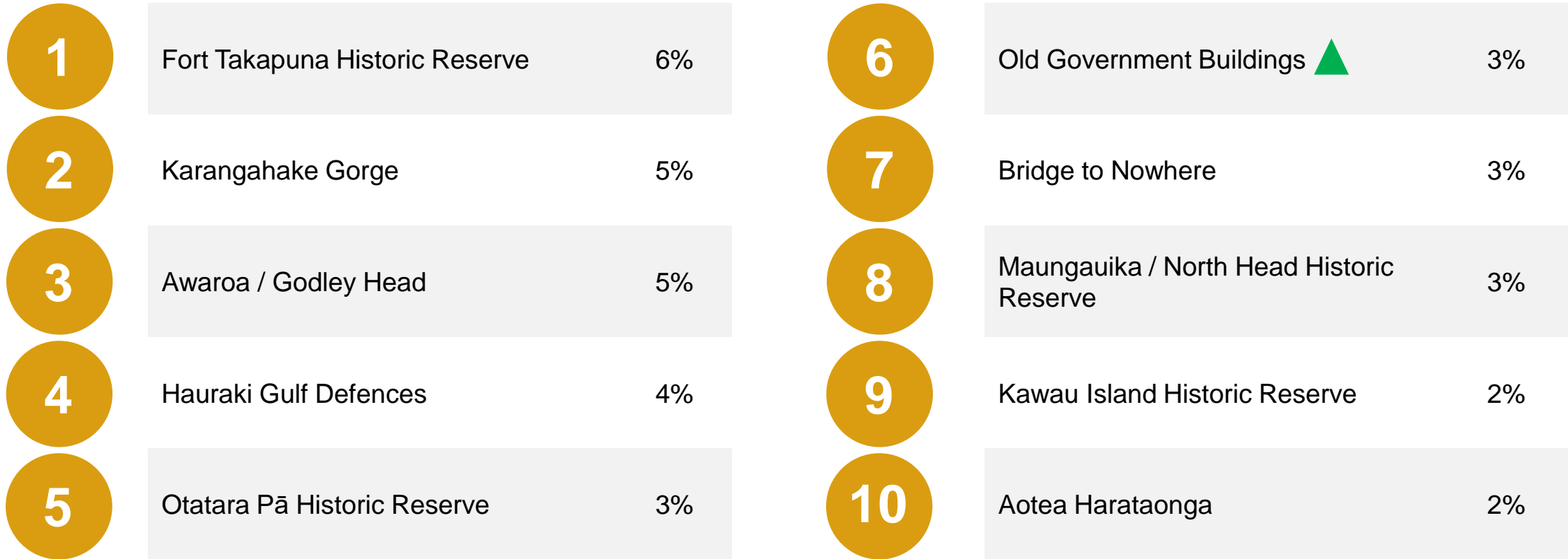
*Green / red indicates increase / decrease in rank position compared to previous month*

**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=5,363)*

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# *Short walks & sightseeing* remain the most common activities at Protected Natural Areas.

## Top activities when visiting Protected Natural Areas*

| | Total | Jun'21 | Jul'21 | Aug'21 | Sep'21 | Oct'21 | Nov'21 | Dec'21 | Jan'22 | Feb'22 | Mar'22 | Apr'22 | May'22 | Jun'22 | Jul'22 | Aug'22 | Sep'22 | Oct'22 | Nov'22 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| *Base (n=)* | *7,562* | *392* | *422* | *464* | *380* | *407* | *379* | *401* | *478* | *477* | *450* | *484* | *504* | *498* | *492* | *451* | *436* | *442* | *465* |
| Short walk (<3 hours) | 38% | 37% | 38% | 36% | 38% | 35% | 33% | 33% | **41%** | **33%** | **41%** | 38% | 38% | 38% | 38% | 44% | 42% | 40% | 41% |
| Sightseeing | 30% | 29% | 28% | 29% | 32% | 29% | 29% | 24% | **31%** | 27% | 30% | 30% | 32% | 31% | 30% | 35% | 34% | 28% | 31% |
| Photography | 25% | 25% | 29% | 26% | 26% | 21% | 22% | 21% | 24% | 24% | 27% | 24% | 25% | 24% | 25% | 26% | 26% | 26% | 27% |
| Bird / wildlife watching | 24% | 25% | 27% | 28% | 24% | 26% | 26% | 24% | 22% | 20% | 24% | 25% | 24% | 24% | 25% | 26% | 24% | 24% | 24% |
| Connecting with nature | 23% | 22% | 21% | 25% | 22% | 17% | 25% | 21% | 21% | 21% | 24% | 24% | 25% | 25% | 26% | **20%** | 22% | 25% | 22% |
| Day walk / hike (>3 hours but not overnight) | 23% | 25% | 25% | 23% | 26% | 21% | 25% | 26% | 22% | 21% | 20% | 24% | 21% | 26% | 21% | 23% | 23% | 23% | 21% |
| Picnic, barbeque, etc | 20% | 20% | 21% | 17% | 19% | 17% | 20% | 19% | 22% | 21% | 22% | 22% | 18% | 19% | 20% | 20% | 21% | 21% | 20% |
| Connecting with history | 13% | 10% | 13% | 14% | 14% | 11% | **17%** | **10%** | 12% | 11% | **16%** | 14% | 14% | 13% | 13% | 10% | 13% | 17% | 15% |
| Connecting with culture | 10% | 8% | 9% | 11% | 11% | 8% | 11% | 12% | 10% | 11% | 10% | 10% | 12% | **7%** | 11% | 8% | 8% | **13%** | 11% |
| Camping | 12% | 15% | 14% | 12% | 14% | 14% | 14% | 12% | 16% | 14% | 13% | 12% | 11% | 11% | 11% | 11% | 8% | 10% | 11% |
| Boating / sailing | 8% | 9% | 9% | 10% | **5%** | 8% | 8% | 8% | 10% | 10% | 10% | 9% | 9% | 8% | 8% | 7% | 6% | 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:*** *Only activities 6% and above for current month displayed.* ****Caution:*** *Low base size (n<100), results indicative only.*

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# VISIT SATISFACTION

# *Friends / family / local people* are the most commonly used source of information used for planning visits to Protected Natural Areas, closely followed by weather forecasts.

**Sources of Information used for Planning**

| Source | % |
|---|---|
| Friends / family / local people | 37% |
| Weather forecasts | 36% |
| DOC website | 18% |
| Smartphone app, e.g. Plan My Walk, Trailforks, Great Rides | 18% |
| None of these | 18% |
| GPS route-mapping software / apps / devices | 17% |
| Social media e.g. Facebook group | 16% |
| Online sources e.g. YouTube, podcasts etc | 15% |
| DOC pamphlets / printed information / maps | 10% |
| TV / Radio / Magazines/ Newspapers / Books | 7% |
| DOC visitor centre / speaking to a DOC person | 6% |
| Commercial business e.g. guide, shop, transport or accommodation provider | 5% |
| Club or course (e.g. tramping, diving club etc) | 3% |
| Other | 2% |

*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 in the last month (n=465)*

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

**Protected Natural Areas – Overall Experience**

*Green / red indicates significantly higher / lower than previous month*

**Mean Score**

| 4.2 | 4.1 | 4.1 | 4.1 | **4.2** | 4.2 | 4.2 | 4.2 | 4.2 | 4.1 | 4.2 | 4.2 | 4.1 | 4.1 | 4.1 | 4.1 | 4.2 |



Stacked bar chart values:

| | Jul '21 (n=422) | Aug '21 (n=464) | Sep '21 (n=380) | Oct '21 (n=407) | Nov '21 (n=379) | Dec '21 (n=401) | Jan '22 (n=478) | Feb '22 (n=477) | Mar '22 (n=450) | Apr '22 (n=484) | May '22 (n=504) | Jun '22 (n=498) | Jul '22 (n=492) | Aug '22 (n=451) | Sep '22 (n=436) | Oct '22 (n=442) | Nov '22 (n=465) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Exceptionally good (5) | 36% | 32% | 33% | 31% | 34% | 36% | 36% | 37% | 39% | 34% | 33% | 34% | 34% | **27%** | 31% | 33% | 33% |
| Good (4) | 45% | 49% | 47% | 47% | 51% | 46% | 46% | 45% | 46% | 48% | 52% | 49% | 47% | **55%** | 53% | 50% | 53% |
| Acceptably / OK (3) | 17% | 17% | 17% | 19% | **14%** | 17% | 16% | 16% | 13% | 16% | 14% | 15% | 16% | 18% | 14% | 16% | 13% |

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

*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*

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# Visitors' satisfaction with the *condition and capacity of car parks* has increased this month.
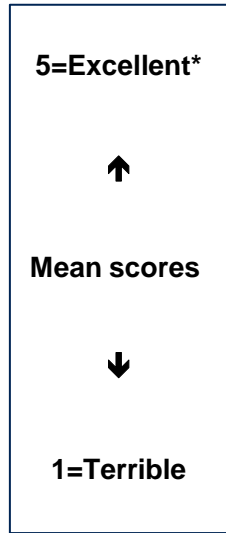
**Satisfaction with Protected Natural Areas: Facilities**
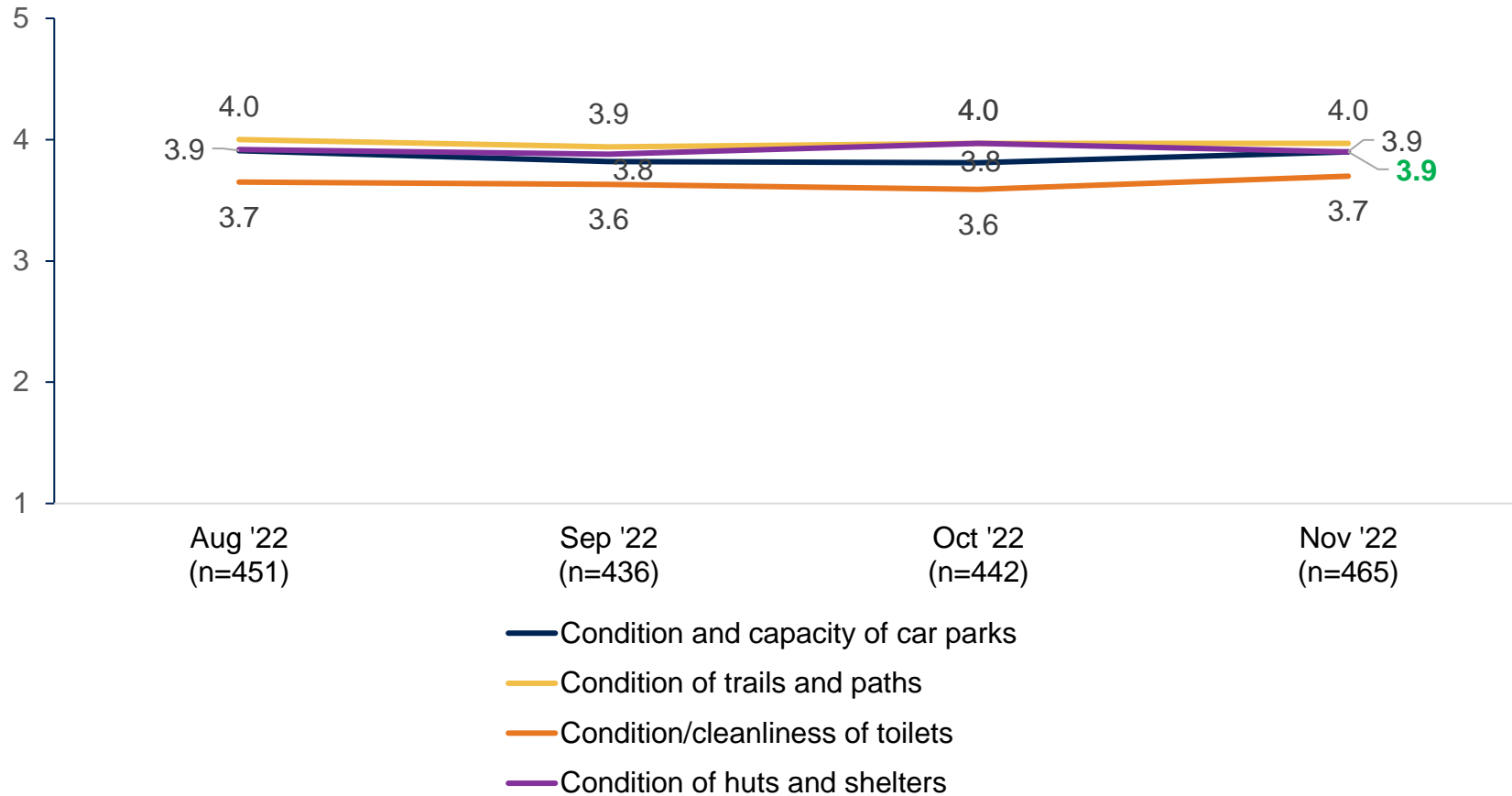


5=Excellent*

↑

Mean scores

↓

1=Terrible

*Green / red indicates significantly higher / lower than previous month*

| | Aug '22 (n=451) | Sep '22 (n=436) | Oct '22 (n=442) | Nov '22 (n=465) |
|---|---|---|---|---|
| Condition of trails and paths | 4.0 | 3.9 | 4.0 | 4.0 |
| Condition and capacity of car parks | 3.9 | 3.8 | 3.8 | 3.9 |
| Condition of huts and shelters | | | | 3.9 |
| Condition/cleanliness of toilets | 3.7 | 3.6 | 3.6 | 3.7 |

— Condition and capacity of car parks

— Condition of trails and paths

— Condition/cleanliness of toilets

— Condition of huts and shelters

*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.*

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# Visitor satisfaction of the *management of impacts from visitors* at Protected Natural Areas has increased this month.

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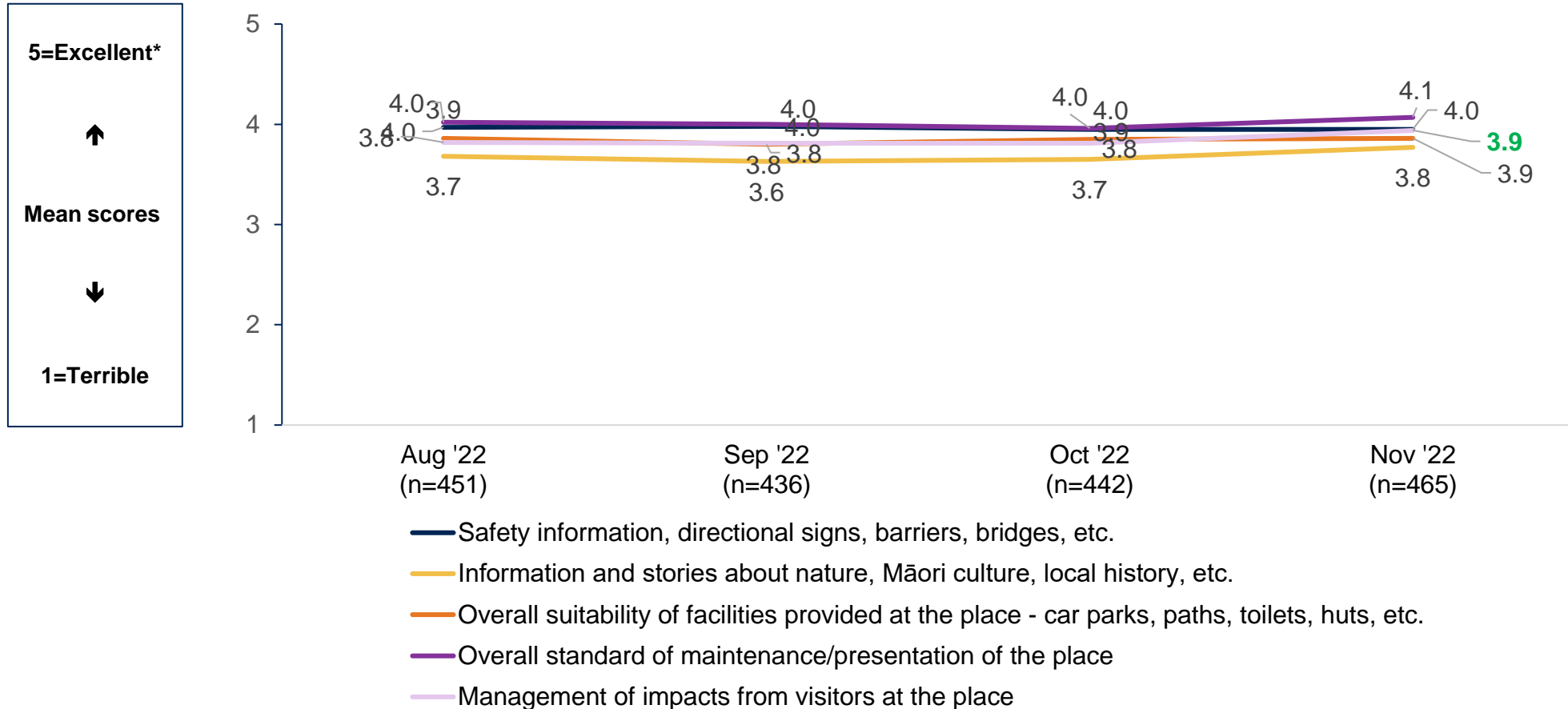


5=Excellent*

↑

Mean scores

↓

1=Terrible

| | Aug '22 (n=451) | Sep '22 (n=436) | Oct '22 (n=442) | Nov '22 (n=465) |
|---|---|---|---|---|
| | 4.0 / 3.9 / 3.8 / 4.0 / 3.7 | 4.0 / 4.0 / 3.8 / 3.8 / 3.6 | 4.0 / 4.0 / 3.9 / 3.8 / 3.7 | 4.1 / 4.0 / 3.9 / 3.8 / 3.9 |

— 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.*

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# Visits to Protected Natural Areas continue to be well-rated, especially for the exercise.
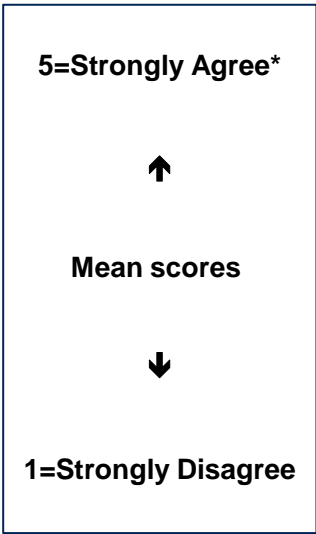
**Personal Experience at Protected Natural Areas (1)**
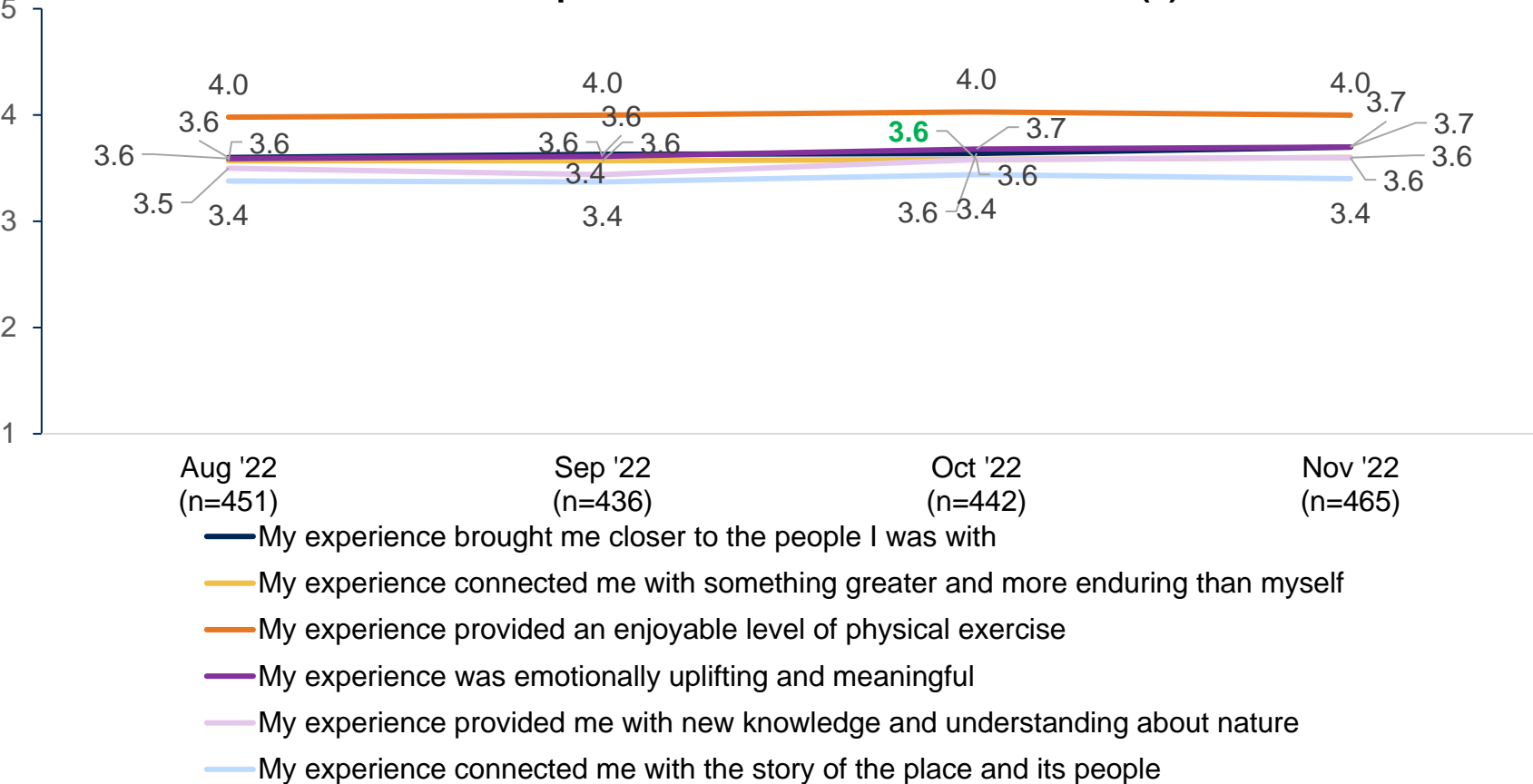


5=Strongly Agree*

↑

Mean scores

↓

1=Strongly Disagree

*Green / red indicates significantly higher / lower than previous month*

| | Aug '22 (n=451) | Sep '22 (n=436) | Oct '22 (n=442) | Nov '22 (n=465) |
|---|---|---|---|---|

— My experience brought me closer to the people I was with

— My experience connected me with something greater and more enduring than myself

— My experience provided an enjoyable level of physical exercise

— My experience was emotionally uplifting and meaningful

— My experience provided me with new knowledge and understanding about nature

— My experience connected me with the story of the place and its people

*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)**

5=Strongly Agree*

↑

Mean scores

↓

1=Strongly Disagree



|  | Aug '22 (n=451) | Sep '22 (n=436) | Oct '22 (n=442) | Nov '22 (n=465) |
|---|---|---|---|---|
| I would be very happy to visit this place again if the opportunity arose | 4.1 | 4.2 | 4.1 | 4.2 |
| This place was worth the time, effort and expense invested in visiting | 4.0 | 4.1 | 4.0 | 4.1 |
| This place provided all the benefits I/my group expected from visiting such places | 3.8 | 3.9 | 3.9 | 3.9 |
| This place was like many others I have visited in Aotearoa New Zealand | 3.4 | 3.4 | 3.4 | 3.4 |
| My experience was one of the best I have ever had in the outdoors | 3.3 | 3.3 | 3.4 | 3.4 |

— My experience was one of the best I have ever had in the outdoors
— This place was worth the time, effort and expense invested in visiting
— I would be very happy to visit this place again if the opportunity arose
— This place provided all the benefits I/my group expected from visiting such places
— This place was like many others I have visited in Aotearoa New Zealand

*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.*

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# Satisfaction with the overall experience at Protected Heritage Places has increased significantly, reflecting a large increase in those having a 'exceptionally good' experience.

**Mean Score**

*Green / red indicates significantly higher / lower than previous month*

## Protected Heritage Places – Overall Experience

| | Jul '21 (n=292) | Aug '21 (n=339) | Sep '21 (n=255) | Oct '21 (n=262) | 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) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Mean Score | 4.1 | 4.1 | 4.0 | 4.0 | 4.0 | 4.0 | 4.1 | 4.1 | 4.1 | 4.1 | 4.2 | **4.0** | 4.1 | 4.0 | 4.0 | 3.9 | **4.1** |
| Exceptionally good | 32% | 30% | 31% | 29% | 31% | 29% | 36% | 35% | 33% | 33% | 35% | 29% | 33% | **24%** | 24% | 23% | **32%** |
| Good | 47% | 49% | 42% | 46% | 48% | 49% | 41% | 46% | 44% | 44% | 48% | 45% | 46% | 53% | 51% | 49% | 48% |
| Acceptably / OK | 19% | 19% | 25% | 23% | 19% | 20% | 20% | 16% | 20% | 21% | 16% | 22% | 21% | 21% | 23% | 25% | 19% |

■ 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*

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# Visitor satisfaction with facilities at Protected Heritage Places has increased following a very slow decline over the past couple of months.

**Satisfaction with Protected Heritage Places: Facilities**
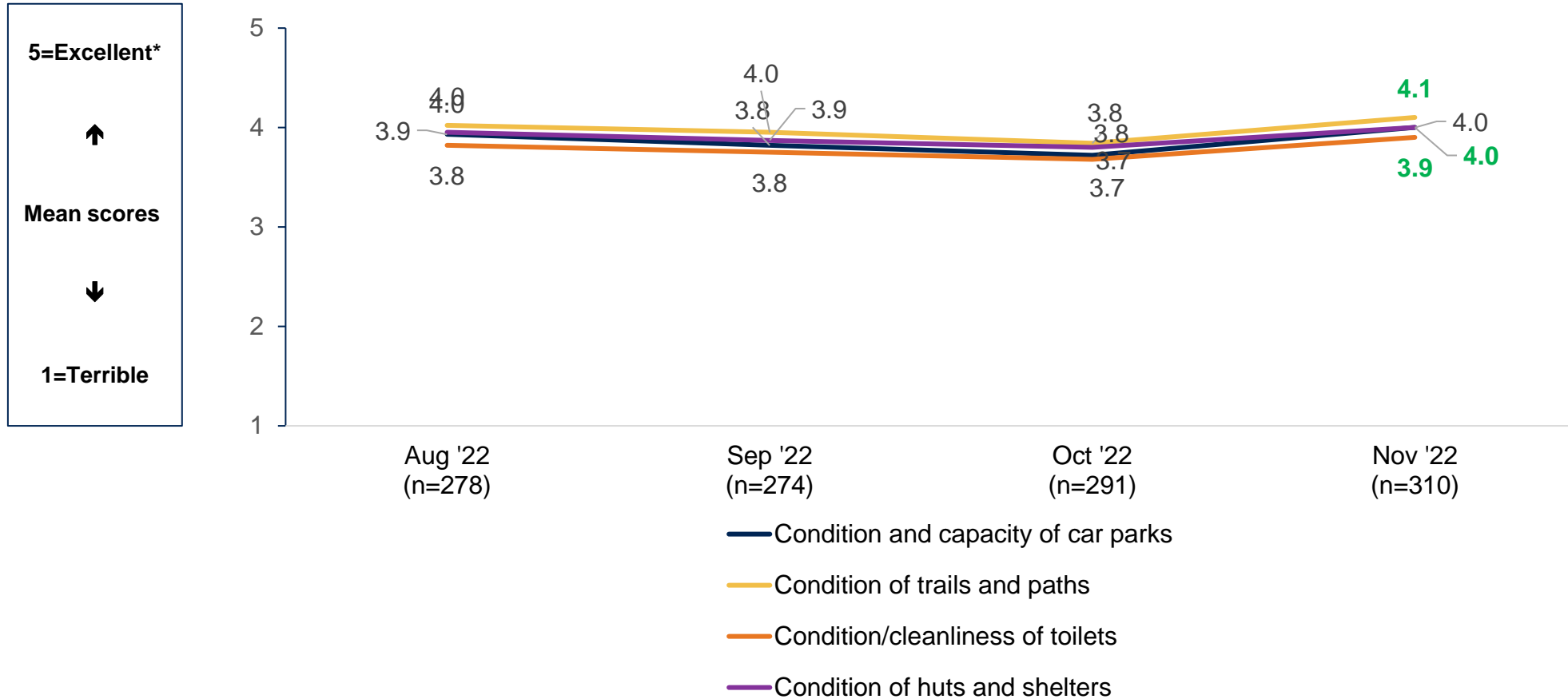
5=Excellent*

↑

Mean scores

↓

1=Terrible



Aug '22 (n=278)    Sep '22 (n=274)    Oct '22 (n=291)    Nov '22 (n=310)

— Condition and capacity of car parks

— Condition of trails and paths

— Condition/cleanliness of toilets

— Condition of huts and shelters

*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.

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# Satisfaction with signage and maintenance at Protected Heritage Places has significantly increased across the board in the past month.

## Satisfaction with Protected Heritage Places: Signage and Maintenance

5=Excellent*

↑

Mean scores

↓

1=Terrible



Aug '22 (n=278)  Sep '22 (n=274)  Oct '22 (n=291)  Nov '22 (n=310)

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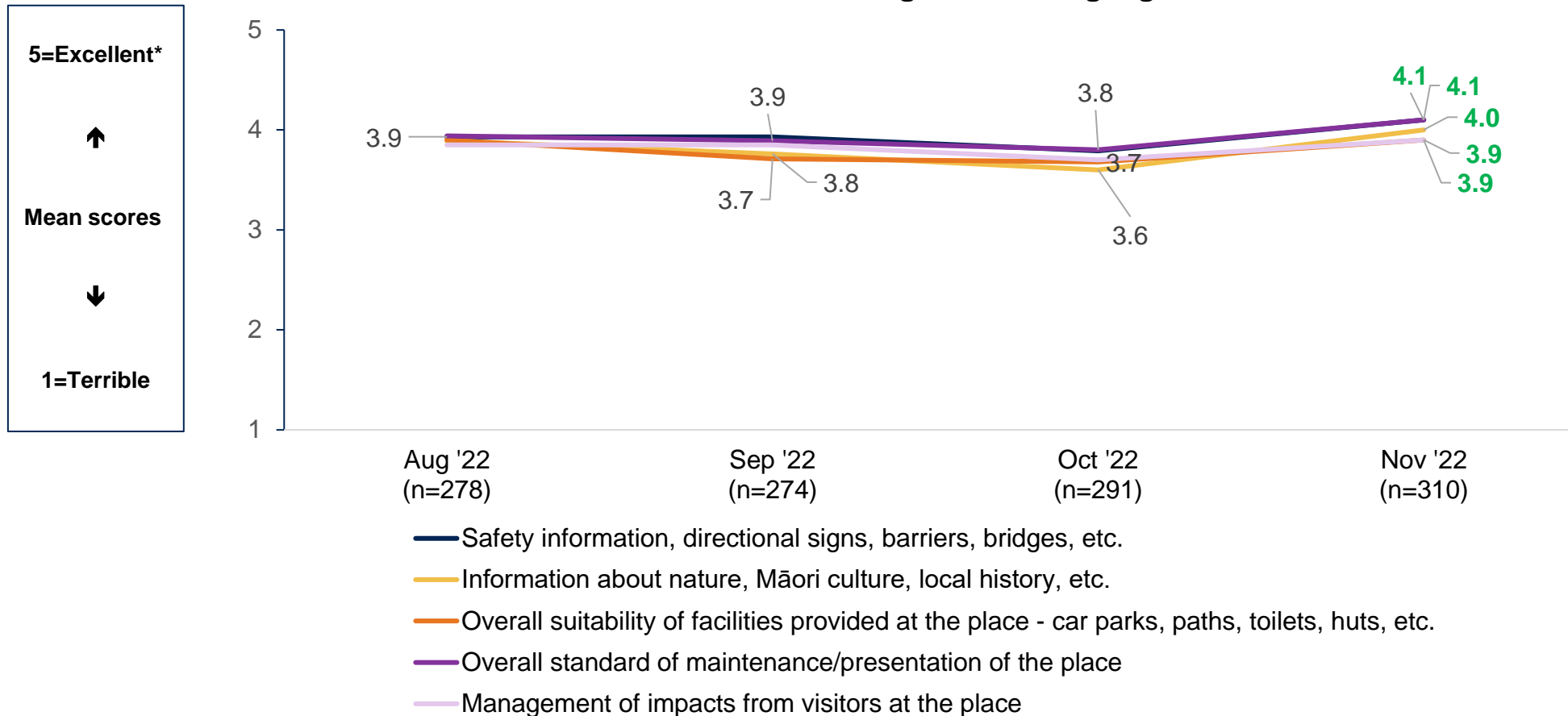
*Q26a:* *Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how would you rate the following aspects listed below?*

*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.*

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# All measures of personal experience have increased this month, particularly *new knowledge and understanding about nature.*

**Personal Experience at Protected Heritage Places (1)**



5=Strongly Agree*

↑

Mean scores

↓

1=Strongly Disagree

| | Aug '22 (n=278) | Sep '22 (n=274) | Oct '22 (n=291) | Nov '22 (n=310) |
|---|---|---|---|---|
| | 3.8 / 3.6 / 3.6 / 3.5 / 3.4 | 3.7 / 3.5 / 3.5 / 3.4 | 3.7 / 3.6 / 3.5 | 3.8 / 3.7 / 3.7 / 3.6 / 3.6 / 3.6 |

— My experience brought me closer to the people I was with
— My experience connected me with something greater and more enduring than myself
— My experience provided an enjoyable level of physical exercise
— My experience was emotionally uplifting and meaningful
— My experience provided me with new knowledge and understanding about nature
— My experience connected me with the story of the place and its people

*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.*

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# More PHP visitors agreed their location met their expectations and was worth the effort visiting.

## Personal Experience at Protected Heritage Places (2)



**5=Strongly Agree***

↑

**Mean scores**

↓

**1=Strongly Disagree**

| | Aug '22 (n=278) | Sep '22 (n=274) | Oct '22 (n=291) | Nov '22 (n=310) |
|---|---|---|---|---|
| My experience was one of the best... | 3.3 | 3.3 | 3.3 | 3.5 |
| This place was worth the time... | 3.9 | 3.9 | 3.6 | 3.9 |
| I would be very happy to visit... | 3.9 | 3.9 | 3.7 | 4.0 |
| This place provided all the benefits... | 3.8 | 3.7 | 3.6 | 3.9 |
| This place was like many others... | 3.4 | 3.3 | 3.4 | 3.6 |

—— My experience was one of the best I have ever had at a historical place

—— This place was worth the time, effort and expense invested in visiting

—— I would be very happy to visit this place again if the opportunity arose

—— This place provided all the benefits I/my group expected from visitng such places

—— This place was like many others I have visited in Aotearoa New Zealand

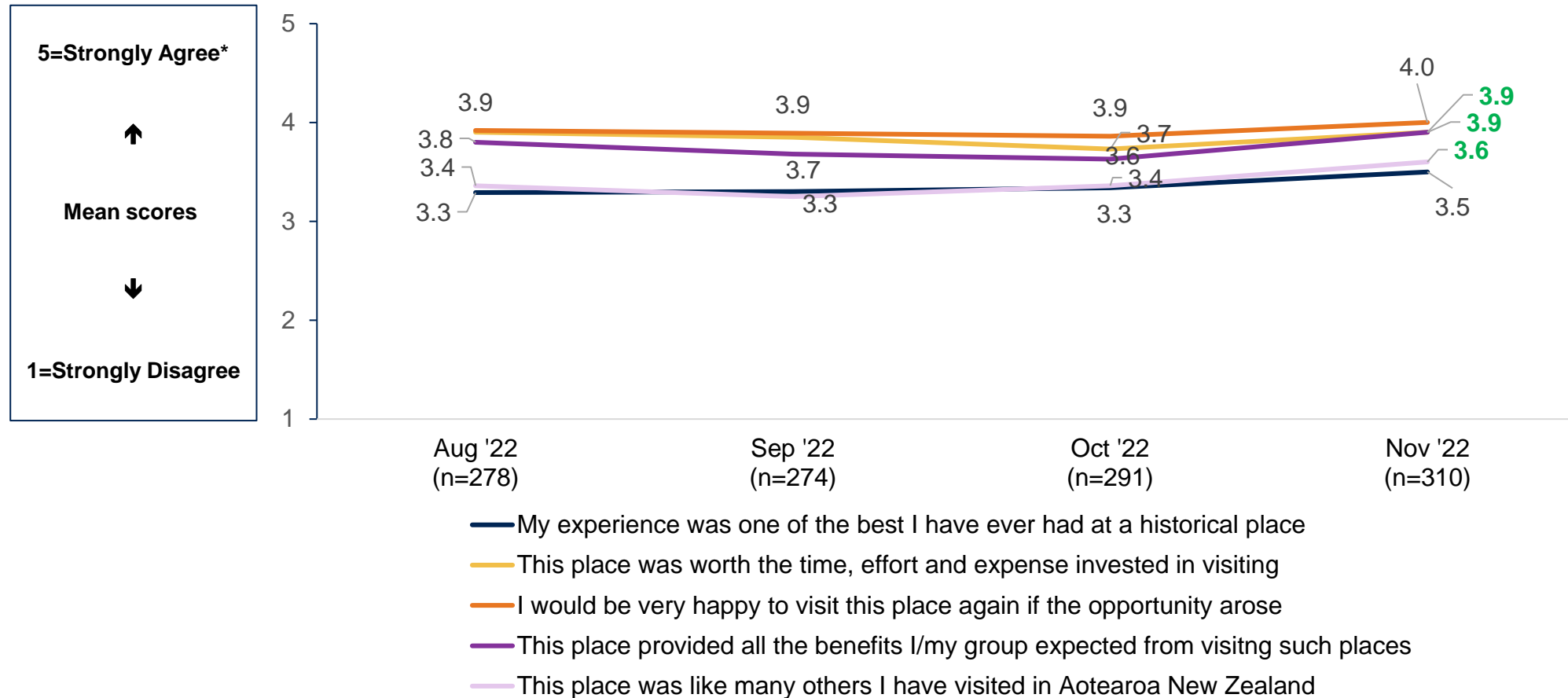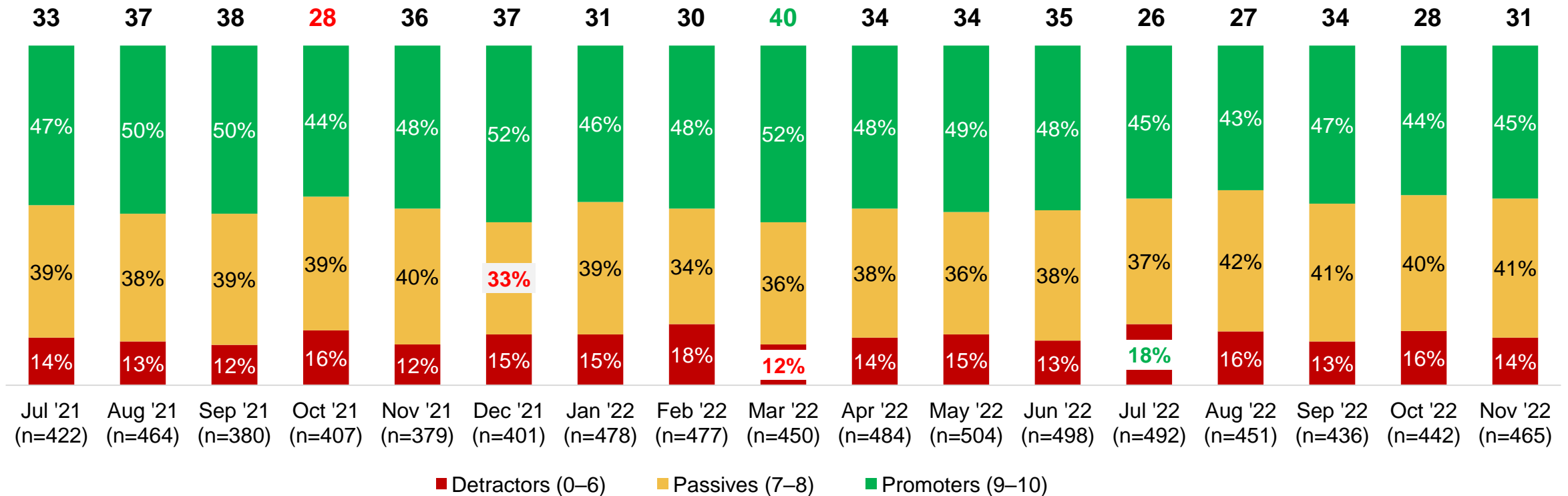*Q26b: Still thinking about your most recent visit to <LOCATION SELECTED IN Q20>, how much do you agree or disagree with each of the statements below?*

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

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# NPS

# Protected Natural Areas' NPS has increased due to a decrease in Detractors.

## Protected Natural Areas – NPS

| Month | Detractors (0–6) | Passives (7–8) | Promoters (9–10) | NPS |
|-------|------------------|----------------|-------------------|-----|
| Jul '21 (n=422) | 14% | 39% | 47% | 33 |
| Aug '21 (n=464) | 13% | 38% | 50% | 37 |
| Sep '21 (n=380) | 12% | 39% | 50% | 38 |
| Oct '21 (n=407) | 16% | 39% | 44% | **28** |
| Nov '21 (n=379) | 12% | 40% | 48% | 36 |
| Dec '21 (n=401) | 15% | **33%** | 52% | 37 |
| Jan '22 (n=478) | 15% | 39% | 46% | 31 |
| Feb '22 (n=477) | 18% | 34% | 48% | 30 |
| Mar '22 (n=450) | **12%** | 36% | 52% | **40** |
| Apr '22 (n=484) | 14% | 38% | 48% | 34 |
| May '22 (n=504) | 15% | 36% | 49% | 34 |
| Jun '22 (n=498) | 13% | 38% | 48% | 35 |
| Jul '22 (n=492) | **18%** | 37% | 45% | 26 |
| Aug '22 (n=451) | 16% | 42% | 43% | 27 |
| Sep '22 (n=436) | 13% | 41% | 47% | 34 |
| Oct '22 (n=442) | 16% | 40% | 44% | 28 |
| Nov '22 (n=465) | 14% | 41% | 45% | 31 |

■ Detractors (0–6)　■ Passives (7–8)　■ Promoters (9–10)

*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*

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# Protected Heritage Places' NPS has significantly increased, with a significant drop in Detractors mirrored by an increase in Promoters.

**Protected Heritage Places – NPS**

| | 21 | 24 | 22 | 24 | 25 | 25 | 26 | 23 | 25 | 23 | 26 | 21 | 23 | 19 | 14 | 6 | **24** |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Promoters | 41% | 44% | 40% | 45% | 43% | 45% | 45% | 43% | 41% | 45% | 44% | 44% | 42% | 39% | 37% | 31% | **42%** |
| Passives | 38% | 35% | 41% | 34% | 38% | 35% | 36% | 37% | 42% | **34%** | 38% | 33% | 39% | 41% | 40% | 44% | 40% |
| Detractors | 21% | 20% | 19% | 21% | 18% | 20% | 19% | 20% | 16% | 21% | 18% | 23% | 19% | 20% | 23% | 25% | **18%** |

| Jul '21 (n=292) | Aug '21 (n=339) | Sep '21 (n=255) | Oct '21 (n=262) | 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) |

■ Detractors (0–6)   ■ Passives (7–8)   ■ Promoters (9–10)
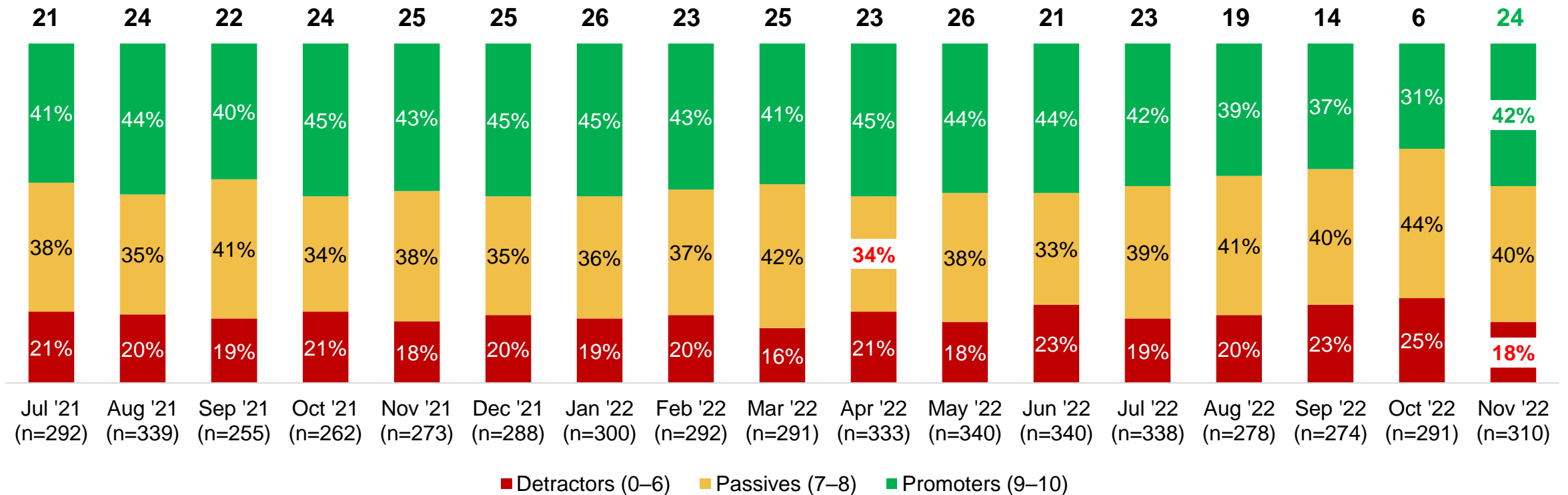
*Green / red indicates significantly higher / lower than previous month*
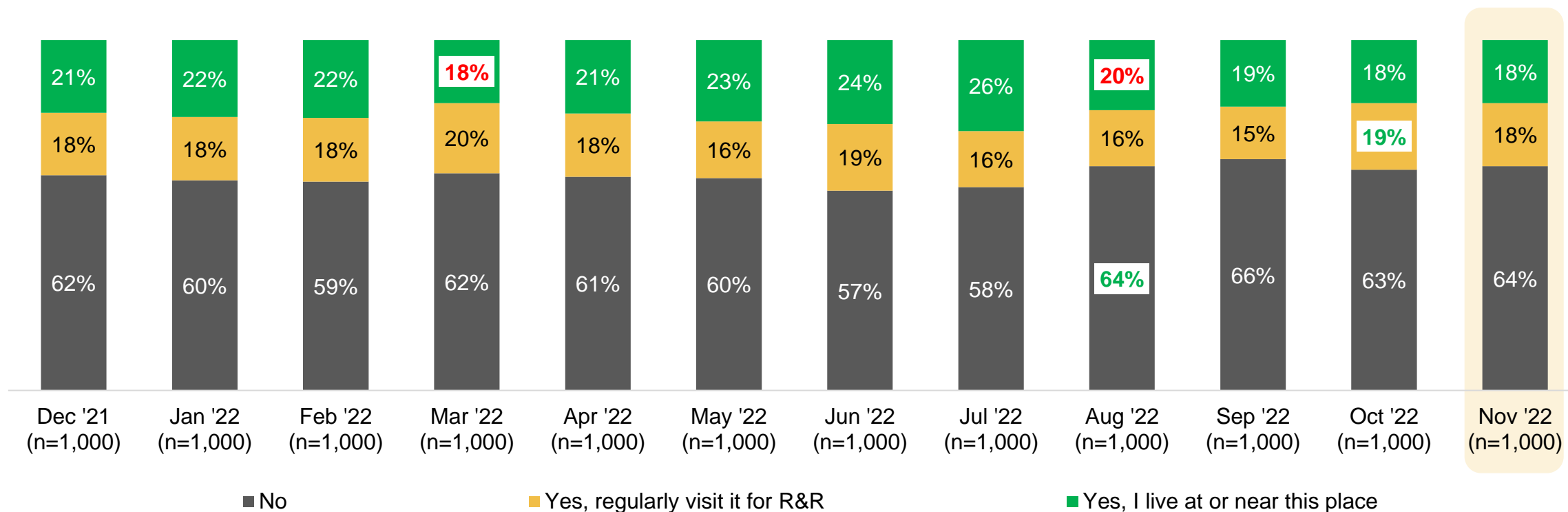
*Q28: How LIKELY is it you would RECOMMEND <LOCATION SELECTED IN Q20> to your family or friends?*

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

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# 'THRIVE' MODULE

# The number of visitors who regularly visit a PNA of personal importance to them was unchanged after a significant increase in October.

**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*

| | Dec '21 (n=1,000) | Jan '22 (n=1,000) | Feb '22 (n=1,000) | Mar '22 (n=1,000) | Apr '22 (n=1,000) | May '22 (n=1,000) | Jun '22 (n=1,000) | Jul '22 (n=1,000) | Aug '22 (n=1,000) | Sep '22 (n=1,000) | Oct '22 (n=1,000) | Nov '22 (n=1,000) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Yes, I live at or near this place | 21% | 22% | 22% | **18%** | 21% | 23% | 24% | 26% | **20%** | 19% | 18% | 18% |
| Yes, regularly visit it for R&R | 18% | 18% | 18% | 20% | 18% | 16% | 19% | 16% | 16% | 15% | **19%** | 18% |
| No | 62% | 60% | 59% | 62% | 61% | 60% | 57% | 58% | **64%** | 66% | 63% | 64% |

■ No    ■ Yes, regularly visit it for R&R    ■ Yes, I live at or near this place

*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*

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# There has been a significant increase in the number of people who cite a *beach / coastal location* as being especially important to them. There has been a significant decrease of those saying the same about *bush / forest* locations.

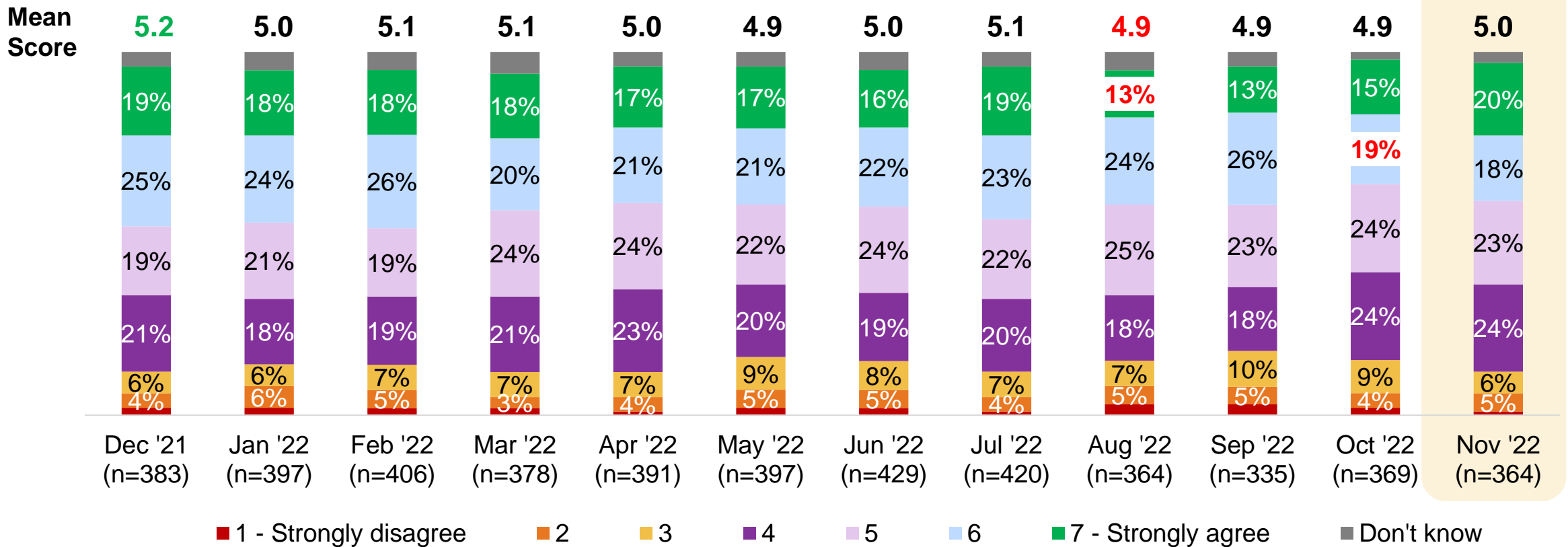**Which of the following best describes the location of this place?**



| | Dec '21 (n=383) | Jan '22 (n=397) | Feb '22 (n=406) | Mar '22 (n=378) | Apr '22 (n=391) | May '22 (n=397) | Jun '22 (n=429) | Jul '22 (n=420) | Aug '22 (n=364) | Sep '22 (n=335) | Oct '22 (n=369) | Nov '22 (n=364) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| A Heritage Place | 19% | 15% | 15% | 14% | 18% | 15% | 16% | 13% | 12% | 13% | 15% | 12% |
| Mountainous / back-country area | 11% | 12% | 11% | 11% | 10% | 11% | 11% | 10% | 14% | 14% | 13% | 13% |
| Bush / forest area | **18%** | **26%** | 23% | 19% | 21% | 21% | 22% | 26% | 22% | 21% | 24% | **18%** |
| River / lake area | 14% | 14% | 13% | 14% | 14% | 14% | 13% | 13% | 11% | 13% | 11% | 12% |
| Beach / coastal / ocean place | 38% | 34% | 38% | 43% | 37% | 39% | 38% | 38% | 41% | 38% | 37% | **46%** |

*Green / red indicates significantly higher / lower than previous month*

■ Beach / coastal / ocean place    ■ River / lake area    ■ Bush / forest area    ■ Mountainous / back-country area    ■ A Heritage Place

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

*Base: Those who live near or regularly visit this place*

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# The number of people who strongly agree that *visitors enable local stories, identities & traditions* has increased.

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



Mean Score

| | Dec '21 (n=383) | Jan '22 (n=397) | Feb '22 (n=406) | Mar '22 (n=378) | Apr '22 (n=391) | May '22 (n=397) | Jun '22 (n=429) | Jul '22 (n=420) | Aug '22 (n=364) | Sep '22 (n=335) | Oct '22 (n=369) | Nov '22 (n=364) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Mean | 5.2 | 5.0 | 5.1 | 5.1 | 5.0 | 4.9 | 5.0 | 5.1 | 4.9 | 4.9 | 4.9 | 5.0 |
| 7 - Strongly agree | 19% | 18% | 18% | 18% | 17% | 17% | 16% | 19% | 13% | 13% | 15% | 20% |
| 6 | 25% | 24% | 26% | 20% | 21% | 21% | 22% | 23% | 24% | 26% | 19% | 18% |
| 5 | 19% | 21% | 19% | 24% | 24% | 22% | 24% | 22% | 25% | 23% | 24% | 23% |
| 4 | 21% | 18% | 19% | 21% | 23% | 20% | 19% | 20% | 18% | 18% | 24% | 24% |
| 3 | 6% | 6% | 7% | 7% | 7% | 9% | 8% | 7% | 7% | 10% | 9% | 6% |
| 2 | 4% | 6% | 5% | 3% | 4% | 5% | 5% | 4% | 5% | 5% | 4% | 5% |

Legend: 1 - Strongly disagree | 2 | 3 | 4 | 5 | 6 | 7 - Strongly agree | Don't know

*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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# Strong agreement that *visitors improve the quality of life of the local communities* has significantly increased.

## "Visitors to this Protected Natural Area improve the quality of life of the local communities"
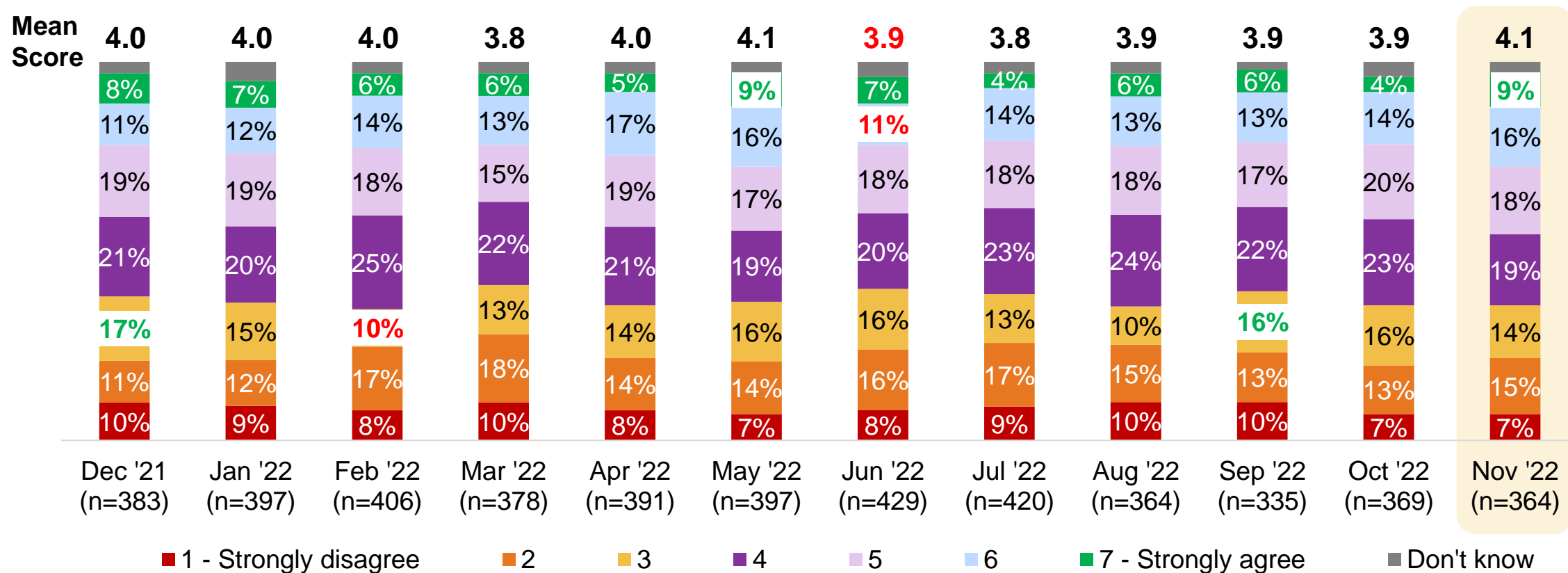


**Mean Score**

| | Dec '21 | Jan '22 | Feb '22 | Mar '22 | Apr '22 | May '22 | Jun '22 | Jul '22 | Aug '22 | Sep '22 | Oct '22 | Nov '22 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Mean | 4.8 | 4.8 | 4.7 | 4.7 | 4.9 | 4.8 | 4.7 | 4.8 | 4.7 | 4.7 | 4.7 | 4.9 |
| 7 - Strongly agree | 12% | 14% | 12% | 10% | 14% | 15% | 12% | 10% (2%) | 11% | 12% | 10% | 16% |
| 6 | 22% | 20% | 19% | 20% | 20% | 20% | 17% | 21% | 18% | 20% | 22% | 17% |
| 5 | 22% | 18% | 22% | 25% | 24% | 21% | 25% | 27% | 24% | 23% | 22% | 26% |
| 4 | 22% | 24% | 21% | 23% | 24% | 24% | 21% | 24% | 27% | 26% | 25% | 21% |
| 3 | 8% | 9% | 11% | 11% | 8% | 9% | 9% | 10% | 8% | 8% | 11% | 11% |
| 2 | | 7% | 6% | | 4% | | 7% | 4% | | | | 4% |
| 1 - Strongly disagree | 5% | | | 5% | | 5% | | | 5% | 5% | 5% | |

*Green / red indicates significantly higher / lower than previous month*

■ 1 - Strongly disagree  ■ 2  ■ 3  ■ 4  ■ 5  ■ 6  ■ 7 - Strongly agree  ■ Don't know

Base sizes: Dec '21 (n=383), Jan '22 (n=397), Feb '22 (n=406), Mar '22 (n=378), Apr '22 (n=391), May '22 (n=397), Jun '22 (n=492), Jul '22 (n=420), Aug '22 (n=364), Sep '22 (n=335), Oct '22 (n=369), Nov '22 (n=364)

**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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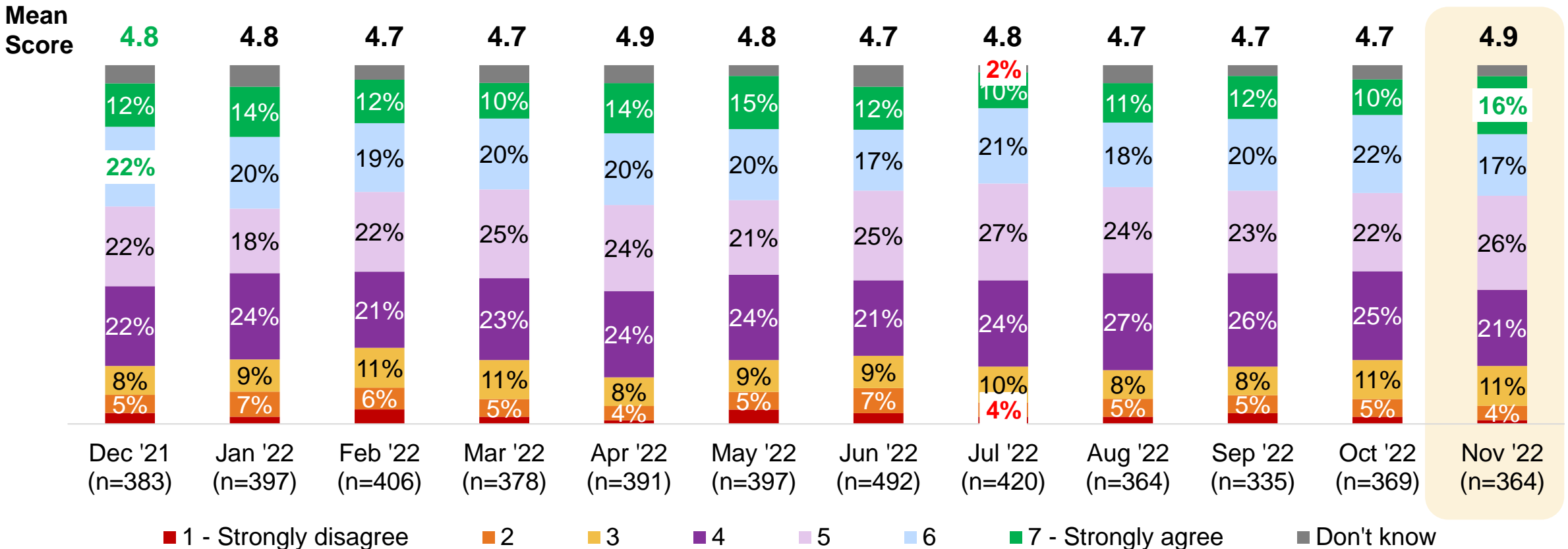
# Despite increased belief in the positive social aspects of visitiation, there has been a significant increase in those strongly agreeing that their 'special' PNA suffers from *visitor-created damage*.

## "This Protected Natural Area is damaged by the activities resulting from these visitors"

**Mean Score**

| | Dec '21 (n=383) | Jan '22 (n=397) | Feb '22 (n=406) | Mar '22 (n=378) | Apr '22 (n=391) | May '22 (n=397) | Jun '22 (n=429) | Jul '22 (n=420) | Aug '22 (n=364) | Sep '22 (n=335) | Oct '22 (n=369) | Nov '22 (n=364) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Mean Score | 4.0 | 4.0 | 4.0 | 3.8 | 4.0 | 4.1 | 3.9 | 3.8 | 3.9 | 3.9 | 3.9 | 4.1 |
| 7 - Strongly agree | 8% | 7% | 6% | 6% | 5% | 9% | 7% | 4% | 6% | 6% | 4% | 9% |
| 6 | 11% | 12% | 14% | 13% | 17% | 16% | 11% | 14% | 13% | 13% | 14% | 16% |
| 5 | 19% | 19% | 18% | 15% | 19% | 17% | 18% | 18% | 18% | 17% | 20% | 18% |
| 4 | 21% | 20% | 25% | 22% | 21% | 19% | 20% | 23% | 24% | 22% | 23% | 19% |
| 3 | 17% | 15% | 10% | 13% | 14% | 16% | 16% | 13% | 10% | 16% | 16% | 14% |
| 2 | 11% | 12% | 17% | 18% | 14% | 14% | 16% | 17% | 15% | 13% | 13% | 15% |
| 1 - Strongly disagree | 10% | 9% | 8% | 10% | 8% | 7% | 8% | 9% | 10% | 10% | 7% | 7% |

**Legend:** ■ 1 - Strongly disagree ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 - Strongly agree ■ Don't know

*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.*

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# Despite the increase in those agreeing that their 'special' PNA suffers from *visitor-created damage,* the perception that *visitors' to PNAs help ensure areas are protected & improved* remains the majority view.

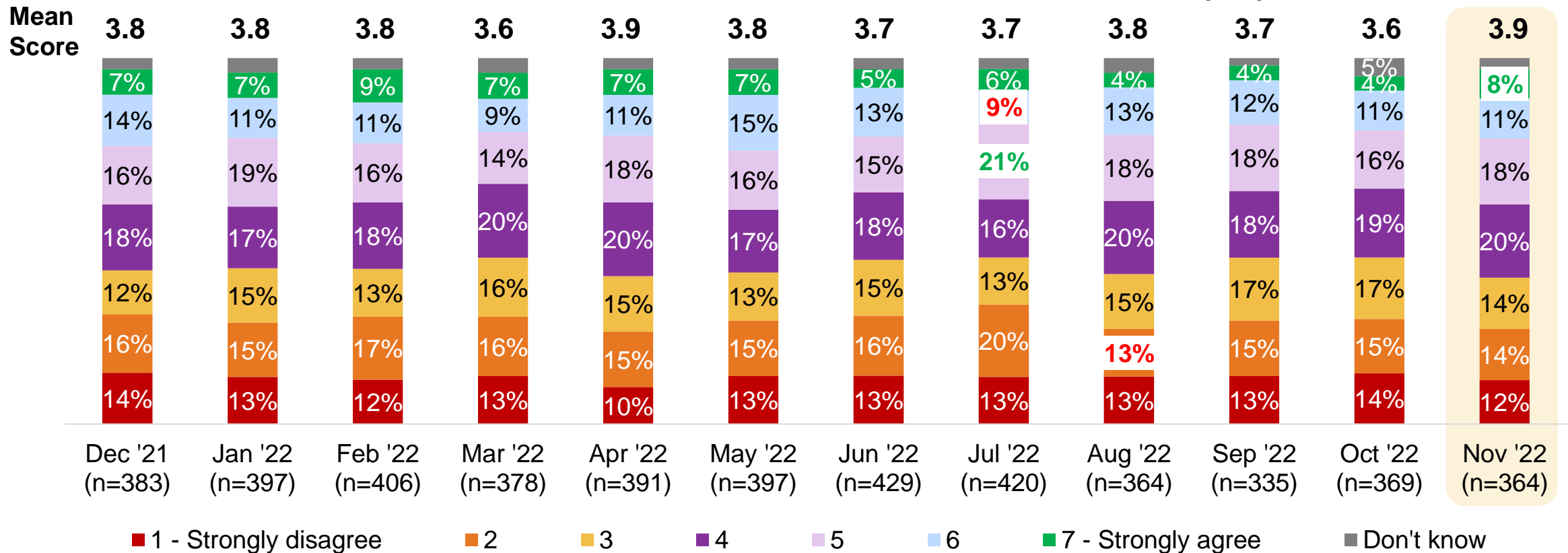**"Visitors to this Protected Natural Area help ensure the areas they visit are protected and improved"**
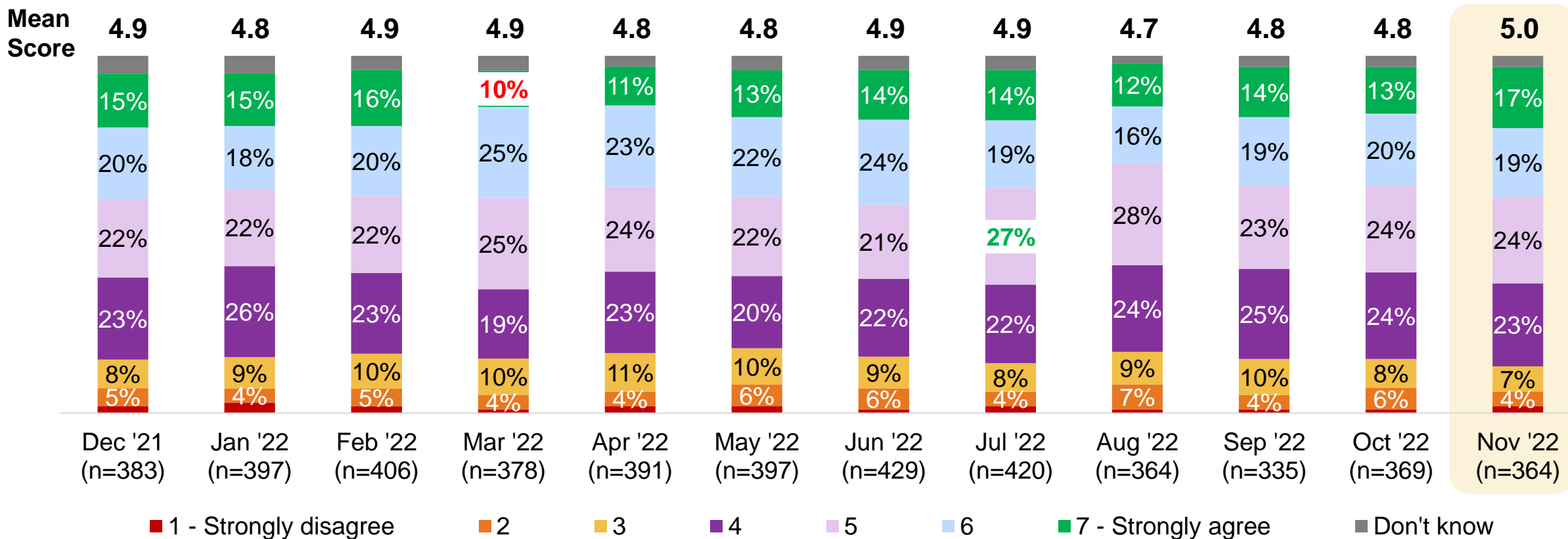
*Green / red indicates significantly higher / lower than previous month*

| Mean Score | 4.9 | 4.8 | 4.9 | 4.9 | 4.8 | 4.8 | 4.9 | 4.9 | 4.7 | 4.8 | 4.8 | 5.0 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 7 - Strongly agree | 15% | 15% | 16% | **10%** | 11% | 13% | 14% | 14% | 12% | 14% | 13% | 17% |
| 6 | 20% | 18% | 20% | 25% | 23% | 22% | 24% | 19% | 16% | 19% | 20% | 19% |
| 5 | 22% | 22% | 22% | 25% | 24% | 22% | 21% | **27%** | 28% | 23% | 24% | 24% |
| 4 | 23% | 26% | 23% | 19% | 23% | 20% | 22% | 22% | 24% | 25% | 24% | 23% |
| 3 | 8% | 9% | 10% | 10% | 11% | 10% | 9% | 8% | 9% | 10% | 8% | 7% |
| 2 | 5% | 4% | 5% | 4% | 4% | 6% | 6% | 4% | 7% | 4% | 6% | 4% |

|  | Dec '21 (n=383) | Jan '22 (n=397) | Feb '22 (n=406) | Mar '22 (n=378) | Apr '22 (n=391) | May '22 (n=397) | Jun '22 (n=429) | Jul '22 (n=420) | Aug '22 (n=364) | Sep '22 (n=335) | Oct '22 (n=369) | Nov '22 (n=364) |

**Legend:** ■ 1 - Strongly disagree ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 - Strongly agree ■ Don't know

*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.*

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# Perceptions of *visitors affecting the attractiveness of the PNA* vary widely, with the mean score almost equally dividing the sample.

## "Visitors to this Protected Natural Area make it less attractive for local people to visit it"
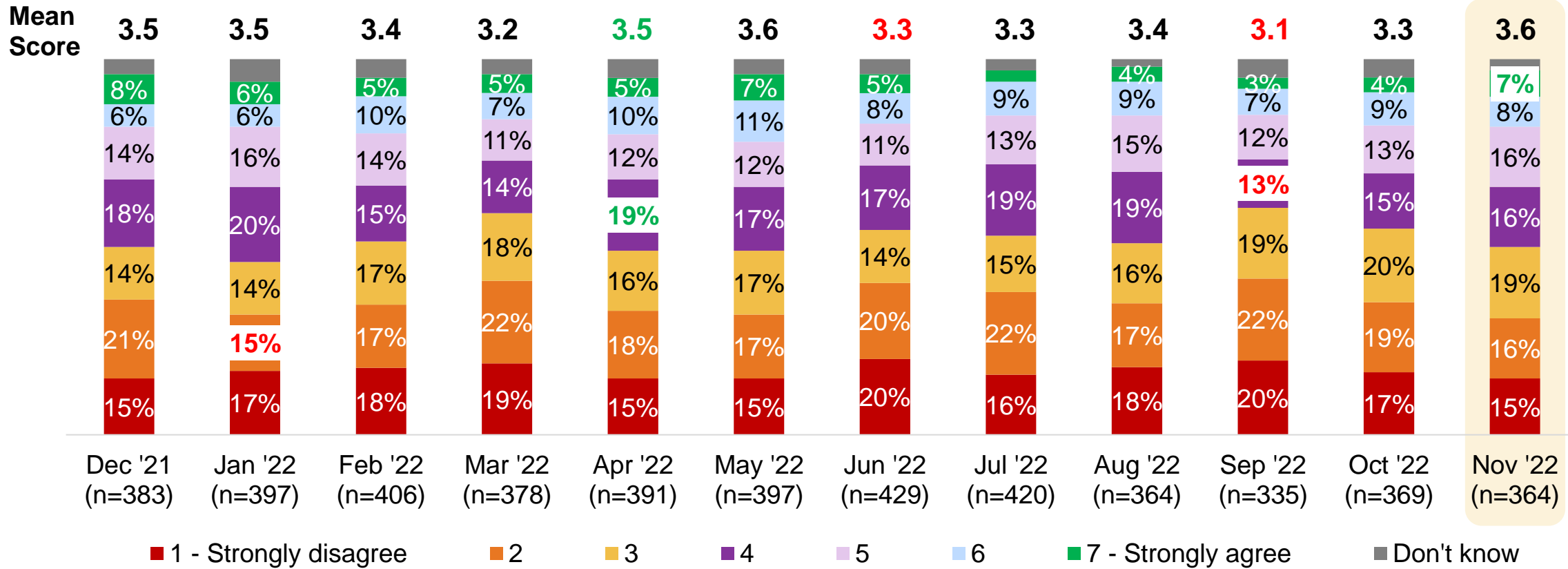


**Mean Score**

| | Dec '21 | Jan '22 | Feb '22 | Mar '22 | Apr '22 | May '22 | Jun '22 | Jul '22 | Aug '22 | Sep '22 | Oct '22 | Nov '22 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Mean | 3.8 | 3.8 | 3.8 | 3.6 | 3.9 | 3.8 | 3.7 | 3.7 | 3.8 | 3.7 | 3.6 | 3.9 |
| 7 - Strongly agree | 7% | 7% | 9% | 7% | 7% | 7% | 5% | 6% | 4% | 4% | 4% | 8% |
| 6 | 14% | 11% | 11% | 9% | 11% | 15% | 13% | 9% | 13% | 12% | 11% | 11% |
| 5 | 16% | 19% | 16% | 14% | 18% | 16% | 15% | 21% | 18% | 18% | 16% | 18% |
| 4 | 18% | 17% | 18% | 20% | 20% | 17% | 18% | 16% | 20% | 18% | 19% | 20% |
| 3 | 12% | 15% | 13% | 16% | 15% | 13% | 15% | 13% | 15% | 17% | 17% | 14% |
| 2 | 16% | 15% | 17% | 16% | 15% | 15% | 16% | 20% | 13% | 15% | 15% | 14% |
| 1 - Strongly disagree | 14% | 13% | 12% | 13% | 10% | 13% | 13% | 13% | 13% | 13% | 14% | 12% |
| Don't know (grey) | | | | | | | | | | | 5% | |

Base sizes: Dec '21 (n=383), Jan '22 (n=397), Feb '22 (n=406), Mar '22 (n=378), Apr '22 (n=391), May '22 (n=397), Jun '22 (n=429), Jul '22 (n=420), Aug '22 (n=364), Sep '22 (n=335), Oct '22 (n=369), Nov '22 (n=364)

Legend: ■ 1 - Strongly disagree  ■ 2  ■ 3  ■ 4  ■ 5  ■ 6  ■ 7 - Strongly agree  ■ Don't know
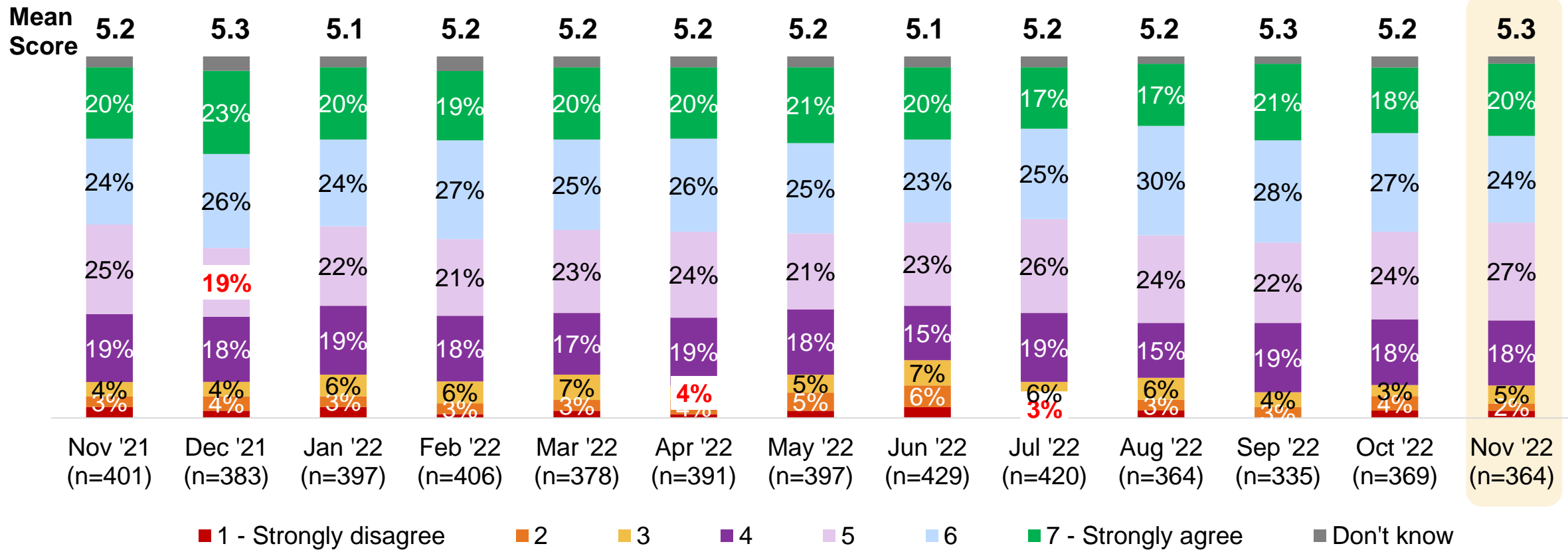
*Green / red indicates significantly higher / lower than previous month*

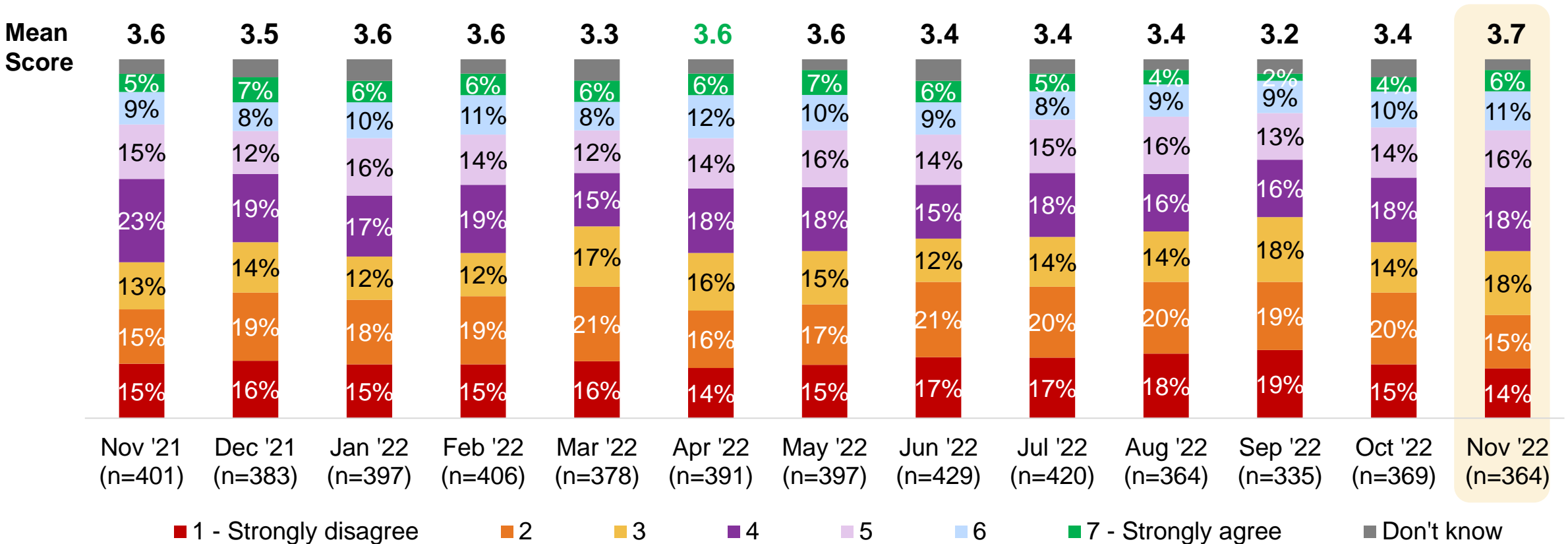*Q42: How much do you agree or disagree with each of the following statements?*
*Base: Those who live near or regularly visit this place. *Note: Significant differences versus total. **Caution: Low base size (n<100), results indicative only.*

# People are still more likely to disagree that *visitors weaken local traditions & cultures,* however those that strongly agree have increased from last month.

## "Visitors to this Protected Natural Area weaken the local communities' traditions and cultures"



Mean Score:

| | Dec '21 (n=383) | Jan '22 (n=397) | Feb '22 (n=406) | Mar '22 (n=378) | Apr '22 (n=391) | May '22 (n=397) | Jun '22 (n=429) | Jul '22 (n=420) | Aug '22 (n=364) | Sep '22 (n=335) | Oct '22 (n=369) | Nov '22 (n=364) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Mean Score | 3.5 | 3.5 | 3.4 | 3.2 | **3.5** | 3.6 | **3.3** | 3.3 | 3.4 | **3.1** | 3.3 | **3.6** |

*Green / red indicates significantly higher / lower than previous month*

Legend:
- 1 - Strongly disagree
- 2
- 3
- 4
- 5
- 6
- 7 - Strongly agree
- Don't know

**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.*

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

## "Visitors to this Protected Natural Area improve the local economy"

*Green / red indicates significantly higher / lower than previous month*

| Mean Score | 5.2 | 5.3 | 5.1 | 5.2 | 5.2 | 5.2 | 5.2 | 5.1 | 5.2 | 5.2 | 5.3 | 5.2 | 5.3 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 7 - Strongly agree | 20% | 23% | 20% | 19% | 20% | 20% | 21% | 20% | 17% | 17% | 21% | 18% | 20% |
| 6 | 24% | 26% | 24% | 27% | 25% | 26% | 25% | 23% | 25% | 30% | 28% | 27% | 24% |
| 5 | 25% | 19% | 22% | 21% | 23% | 24% | 21% | 23% | 26% | 24% | 22% | 24% | 27% |
| 4 | 19% | 18% | 19% | 18% | 17% | 19% | 18% | 15% | 19% | 15% | 19% | 18% | 18% |
| 3 | 4% | 4% | 6% | 6% | 7% | 4% | 5% | 7% | 6% | 6% | | 3% | 5% |
| 2 | 3% | 4% | 3% | 3% | 3% | | 5% | 6% | | 3% | 3% | 4% | 2% |
| 1 - Strongly disagree | | | | | | | | | 3% | | | | |

Nov '21 (n=401) · Dec '21 (n=383) · Jan '22 (n=397) · Feb '22 (n=406) · Mar '22 (n=378) · Apr '22 (n=391) · May '22 (n=397) · Jun '22 (n=429) · Jul '22 (n=420) · Aug '22 (n=364) · Sep '22 (n=335) · Oct '22 (n=369) · Nov '22 (n=364)

**Legend:** ■ 1 - Strongly disagree   ■ 2   ■ 3   ■ 4   ■ 5   ■ 6   ■ 7 - Strongly agree   ■ Don't know

*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

| Mean Score | 3.6 | 3.5 | 3.6 | 3.6 | 3.3 | 3.6 | 3.6 | 3.4 | 3.4 | 3.4 | 3.2 | 3.4 | 3.7 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 7 - Strongly agree | 5% | 7% | 6% | 6% | 6% | 6% | 7% | 6% | 5% | 4% | 2% | 4% | 6% |
| 6 | 9% | 8% | 10% | 11% | 8% | 12% | 10% | 9% | 8% | 9% | 9% | 10% | 11% |
| 5 | 15% | 12% | 16% | 14% | 12% | 14% | 16% | 14% | 15% | 16% | 13% | 14% | 16% |
| 4 | 23% | 19% | 17% | 19% | 15% | 18% | 18% | 15% | 18% | 16% | 16% | 18% | 18% |
| 3 | 13% | 14% | 12% | 12% | 17% | 16% | 15% | 12% | 14% | 14% | 18% | 14% | 18% |
| 2 | 15% | 19% | 18% | 19% | 21% | 16% | 17% | 21% | 20% | 20% | 19% | 20% | 15% |
| 1 - Strongly disagree | 15% | 16% | 15% | 15% | 16% | 14% | 15% | 17% | 17% | 18% | 19% | 15% | 14% |

| Nov '21 (n=401) | Dec '21 (n=383) | Jan '22 (n=397) | Feb '22 (n=406) | Mar '22 (n=378) | Apr '22 (n=391) | May '22 (n=397) | Jun '22 (n=429) | Jul '22 (n=420) | Aug '22 (n=364) | Sep '22 (n=335) | Oct '22 (n=369) | Nov '22 (n=364) |

■ 1 - Strongly disagree   ■ 2   ■ 3   ■ 4   ■ 5   ■ 6   ■ 7 - Strongly agree   ■ Don't know

***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.*

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

Mean*

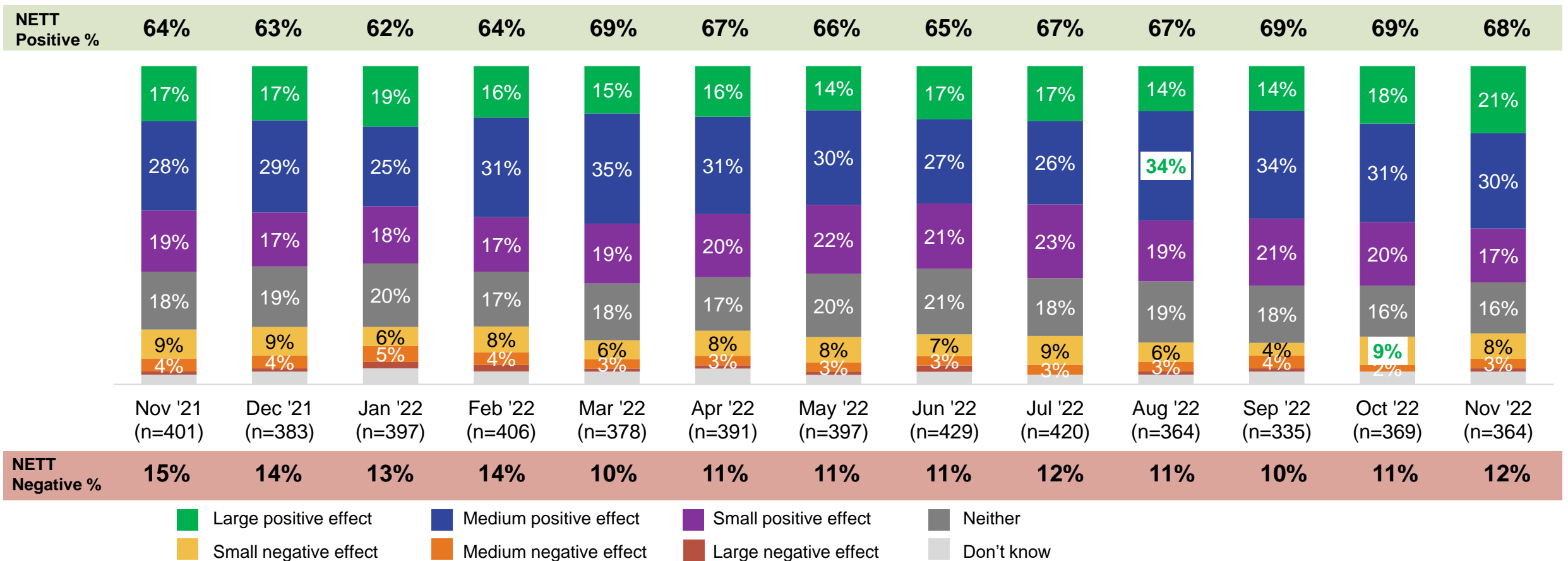| | Total | Beach / Coast | River / Lakes | Bush / Forest | Back-Country | Heritage Place |
|---|---|---|---|---|---|---|
| n= | 4,820 | 1,869 | 613 | 1,045 | 567 | 726 |
| **Positive Effects** | | | | | | |
| Visitors to this Protected Natural Area improve the local economy | 5.2 | 5.3 | 5.2 | 5.0 | 5.2 | 5.1 |
| Visitors to this Protected Natural Area enable stories, identities & traditions to be shared between visitors & local people | 5.0 | 4.9 | 5.1 | 4.8 | 5.1 | 5.3 |
| 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** (*higher numbers are better*) | **4.9** | **4.9** | **5.0** | **4.8** | **5.0** | **5.1** |
| **Negative Effects** | | | | | | |
| This Protected Natural Area is damaged by the activities resulting from these visitors | 4.0 | 4.0 | 4.2 | 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 | 3.3 | 3.6 | 3.5 |
| Visitors to this Protected Natural Area weaken the local communities' traditions & cultures | 3.4 | 3.4 | 3.8 | 3.1 | 3.5 | 3.5 |
| **AVERAGE AGREEMENT WITH NEGATIVE STATEMENTS** (*lower numbers are better*) | **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.*

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# The majority of residents & visitors to these places believe the effect of visitors is positive.

## The effect of visitors on this area

| NETT Positive % | 64% | 63% | 62% | 64% | 69% | 67% | 66% | 65% | 67% | 67% | 69% | 69% | 68% |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|



| | Nov '21 (n=401) | Dec '21 (n=383) | Jan '22 (n=397) | Feb '22 (n=406) | Mar '22 (n=378) | Apr '22 (n=391) | May '22 (n=397) | Jun '22 (n=429) | Jul '22 (n=420) | Aug '22 (n=364) | Sep '22 (n=335) | Oct '22 (n=369) | Nov '22 (n=364) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Large positive effect | 17% | 17% | 19% | 16% | 15% | 16% | 14% | 17% | 17% | 14% | 14% | 18% | 21% |
| Medium positive effect | 28% | 29% | 25% | 31% | 35% | 31% | 30% | 27% | 26% | 34% | 34% | 31% | 30% |
| Small positive effect | 19% | 17% | 18% | 17% | 19% | 20% | 22% | 21% | 23% | 19% | 21% | 20% | 17% |
| Neither | 18% | 19% | 20% | 17% | 18% | 17% | 20% | 21% | 18% | 19% | 18% | 16% | 16% |
| Small negative effect | 9% | 9% | 6% | 8% | 6% | 8% | 8% | 7% | 9% | 6% | 4% | 9% | 8% |
| Medium/Large negative | 4% | 4% | 5% | 4% | 3% | 3% | 3% | 3% | 3% | 3% | 4% | 2% | 3% |

| NETT Negative % | 15% | 14% | 13% | 14% | 10% | 11% | 11% | 11% | 12% | 11% | 10% | 11% | 12% |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|

**Legend:** ● Large positive effect ● Medium positive effect ● Small positive effect ● Neither ● Small negative effect ● Medium negative effect ● Large negative effect ● Don't know

*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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**You act better when you are sure.**

# THANK YOU

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