

National Survey of New Zealanders – Visitor and historic sites report (telephone data only)

Report prepared for: Department of Conservation

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Summary of findings

Visits to Department of Conservation (DOC) areas and National Parks decreased slightly between 2012 and 2013, however, the decreases are not statistically significant – in other words changes are within the ‘margins of error’ associated with survey statistics. In 2012 50% of the population had visited a DOC area in the past twelve months, this changed to 48% in 2013. In 2012 25% of the population had visited a DOC National Park in the previous twelve months, this changed to 23% in 2013.

Awareness that DOC provides recreation services has increased significantly from 2012 – from 77% aware in 2012 to 82% in 2013. With increases in awareness of huts/cabins and outdoor recreation opportunities in particular.

Awareness and use of DOC historic sites has increased between 2012 and 2013. In 2012 63% of respondents were aware that DOC provided historic sites, and 18% had used them. In 2013 this increased to 67% and 24% respectively.

There has been an increase in intention to use DOC services in the next three years (compared with 2012). In particular intention to do a Great Walk or go to a DOC Visitor Centre in the next three years has increased. And there is also an increase in perception that Great Walks and huts/lodges are provided by DOC at a reasonable price (this is a result of less people saying “I’m unsure what the price is” between 2012 and 2013).

One less positive finding is that there has been a downward trend in frequency of using DOC areas for recreation in the past six months (47% of respondents in 2011 had used a DOC area for recreation in the past six months, compared with 43% in 2012 and 39% in 2013).

Looking across all of the visitation questions, there are a number of groups that consistently have higher awareness and usage of DOC facilities. These include:

- Males;
- Those aged 40-54 years;
- Those with a household income of \$60,001 or more per annum;
- Households with children.

In addition, there are a number of groups are less likely to use, or be aware of, DOC facilities including:

- Those aged 18-24 years;
- Households without children;
- Those with a household income of \$40,000 or less per annum.

Background and methodology

In 2013 the Department of Conservation (DOC) undertook their annual survey of adult New Zealanders (The National Survey), replicating research undertaken in 2011 and 2012. The National Survey replaced a variety of independent general public surveys undertaken by DOC in the past.

The research surveys the views of adult New Zealanders (those aged 18 years and over). A total of 2,293 people were interviewed in 2013. All interviews were conducted by telephone, and the sample was sourced via a random sample of people listed on the Electoral Roll. Because the attitude, engagement and favourability questions were asked across three surveys (2011, 2012 and 2013) the total sample profile table per year is sizeable and is displayed in Appendix 1.

In 2012 the research was carried out using a mix of telephone and online interviews. To provide direct comparisons with the 2013 data the 2012 results presented here are based on those who took part in telephone interviews. This means that the 2012 figures in this report differ from those reported last year.

This report focuses on the questions respondents were asked about visitation and perceptions of services provided by DOC.

Estimated sampling errors

The following table provides estimated margins of error associated with various survey results at a total sample size level. The calculations assume simple random sampling and have been calculated at the 95% confidence level. Sub-group analyses carry higher margins of error.

Table 2: Estimated sampling errors

| Survey result (%) | Margin of error associated with 2013 survey (n=2293) | Margin of error when comparing results between 2012 and 2013 (n=3885 and n=2293 respectively) |
|-------------------|--|---|
| 10% or 90% | +/-1.2% | +/-1.8% |
| 20% or 80% | +/-1.6% | +/-2.1% |
| 30% or 70% | +/-1.9% | +/-2.4% |
| 40% or 60% | +/-2.0% | +/-2.5% |
| 50% or 50% | +/-2.1% | +/-2.6% |

All changes commented on in the written commentary of this report are statistically significant at the 95% confidence level unless otherwise stated. The following factors are reported on for statistical significance:

- Gender
- Age
- Ethnicity
- Household income
- Living area (e.g. big city/rural)
- The Conservancy area lived in

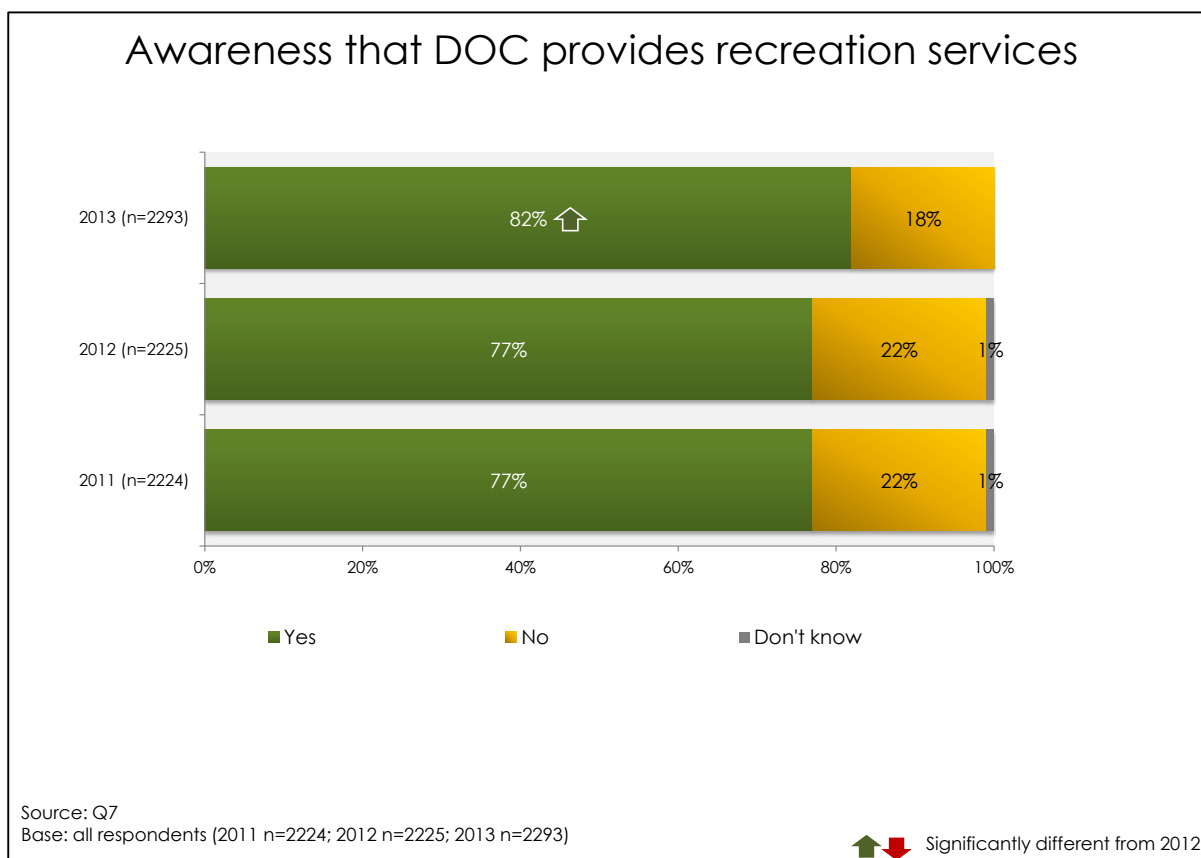
Further, all statistically significant changes between 2012 and 2013 are denoted with an arrow in the graphs. Where changes have occurred between 2012 and 2013 these are commented on in the report.

Detailed findings

Awareness of DOC recreation services

Respondents were asked whether they are aware that the Department of Conservation provides recreation services. Recreation services were defined as facilities and services provided to visitors and people doing outdoor recreation activities. Figure 1 below shows the summary of responses, and compares these to the 2011 and 2012 figures.

Figure 1: Awareness that DOC provides recreation services



The vast majority are aware that DOC provides recreation services (82%), and awareness has increased significantly from 2012 (from 77% awareness in 2012 to 82% in 2013).

There are a number of groups who are significantly more likely than average (82%) to be aware that DOC provides recreation services. These groups are:

- Aged 40-54 years (89%) or 55 years and older (90%);
- Those with a household income of \$60,001 or more per annum (85%);
- Households with children (86%);
- Those with a favourable view of DOC (88%);
- Have visited a DOC historic area in the last 12 months (87%);
- Those who live in the West Coast Conservancy (89%).

In addition, a number of groups are significantly more likely than average (18%) to say they are **not aware** that DOC provides recreation services:

- Aged 18-24 years (45%);
- Identify with an Asian ethnic group (29%);
- Households without children (21%);
- Those who live in the Tongariro, Whanganui, Taranaki Conservancy (25%).

Table 1 below shows that the increased awareness that DOC provides recreation services is largely driven by those living in the Auckland, Bay of Plenty, and West Coast conservancies.

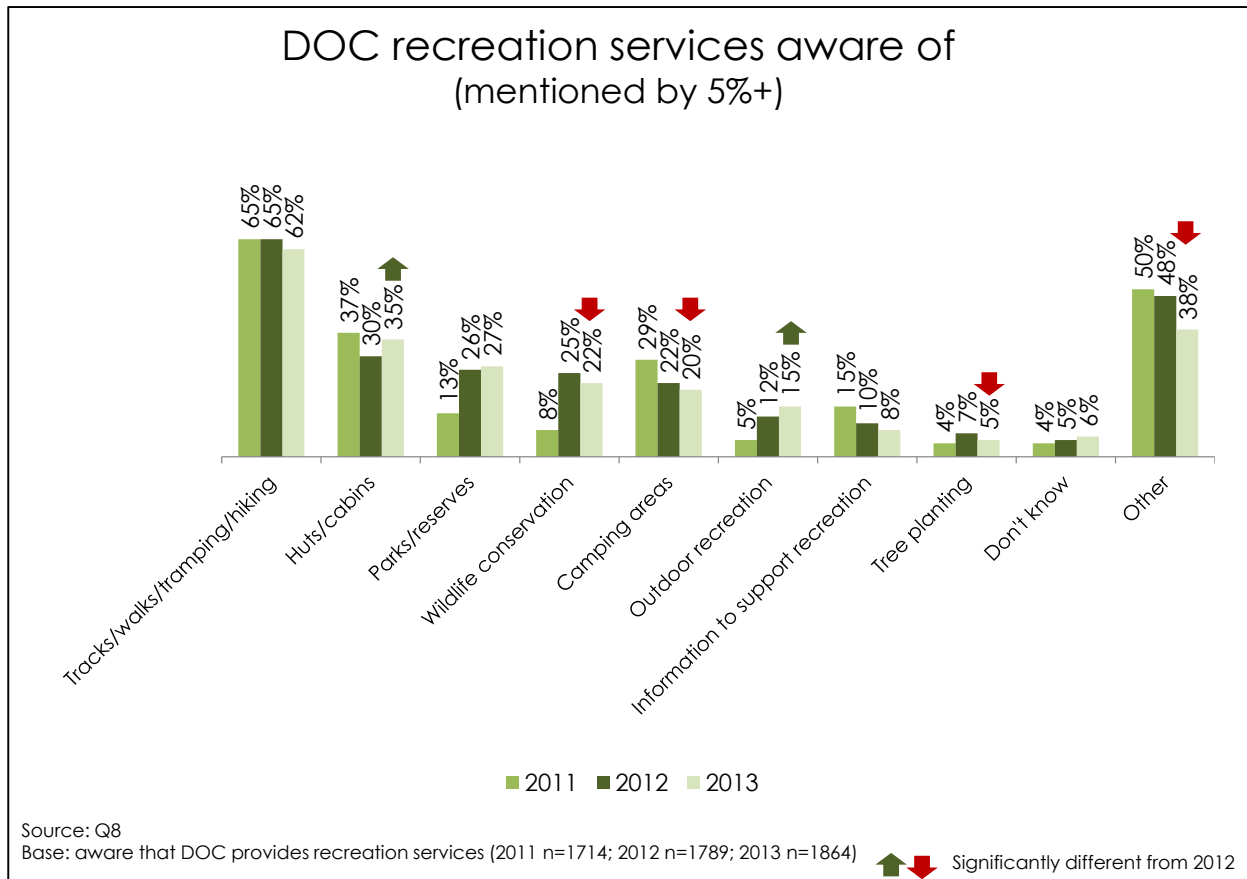
Table 1: Awareness that DOC provides recreation services by Conservancy

| | 2011 (n=2224) | 2012 (n=2225) | 2013 (n=2293) |
|--------------------------------|-------------------------|-------------------------|-------------------------|
| Total | 77% | 77% | 82% |
| Auckland | 74% | 73% | 83% |
| Bay of Plenty | 74% | 72% | 84% |
| Canterbury | 83% | 82% | 82% |
| Nelson/ Marlborough | 78% | 81% | 82% |
| Northland | 74% | 80% | 85% |
| Otago | 71% | 84% | 77% |
| Southland | 75% | 84% | 80% |
| Tongariro, Whanganui, Taranaki | 75% | 78% | 75% |
| Waikato | 80% | 74% | 79% |
| Wellington | 81% | 80% | 82% |
| West Coast | 80% | 80% | 89% |

Knowledge of DOC Services

Those who are aware that DOC provides recreation services were asked which services they know about. Responses were captured unprompted and coded into categories. Figure 2 below shows the summary of responses, and compares these to the 2011 and 2012 figures.

Figure 2: DOC recreation services aware of



Walking and tramping tracks have the highest level of awareness, with over three in five (62%) of those aware of DOC services mentioning tracks. Awareness of DOC huts and cabins has increased from 30% of those aware of DOC services in 2012 to 35% in 2013. Awareness of outdoor recreation has also increased from 12% to 15%. Among those who are aware of DOC services fewer mentioned wildlife conservation, tree planting and camping areas.

Certain groups are more likely to mention specific services. Table 2 below shows the significant differences by service. Those aged 18-24 years tend to be **less likely** to mention four out of the seven services, the exceptions to this being wildlife conservation, camping, and outdoor recreation.

Table 2: Significant differences in awareness of DOC recreations services

| | Groups significantly more likely than average to mention each service: | Groups significantly less likely than average to mention each service: |
|--|---|--|
| Tracks/walks/tramping/hiking (average 62%) | Those who have an unfavourable view of DOC (77%), live in Canterbury Conservancy (72%), Southland Conservancy (77%), or West Coast Conservancy (82%) | Aged 18-24 years (49%), identify with Pacific ethnicity (24%) or Asian ethnicity (45%), have not visited a DOC area in the last 12 months (56%), live in Auckland Conservancy (52%) |
| Huts/cabins (average 35%) | Male (39%), aged 40-54 years (41%), have a favourable view of DOC (39%), have an unfavourable view of DOC (45%), have visited a DOC historic area in the last 12 months (41%), live in Nelson/Marlborough Conservancy (45%) or Wellington Conservancy (44%) | Female (31%), aged under 25 years (18%), identify with pacific ethnicity (7%) or Asian ethnicity (12%), household income of less than \$40,000 per annum (29%), live in the Northland Conservancy (23%) |
| Parks/reserves (average 27%) | Household income of %60,001 plus per annum (32%), live in a big city (32%) | Aged 18-24 years (17%), identify with Maori ethnicity (20%), household income under \$40,000 per annum (20%), live in a rural area (20%), have not visited a DOC area in the last 12 months (21%), Live in Nelson/Marlborough Conservancy (19%), Southland Conservancy (19%) Waikato Conservancy (16%) or West Coast Conservancy (15%) |
| Wildlife conservation (average 22%) | Aged 55 years or older (27%), have visited a DOC historic area in the last 12 months (26%) | Identify with Maori ethnicity (14%), have an unfavourable view of DOC (13%) |
| Camping (average 20%) | Those aged 40-54 years (25%), households with children (26%), have visited a DOC historic area in the last 12 months (24%), live in Northland Conservancy (35%) | Aged 55 years or older (15%), household income of \$40,000 per annum (13%), household without children (15%), haven't visited a DOC area in the last 12 months (14%), live in Canterbury Conservancy (13%), Otago Conservancy (9%), or Wellington Conservancy (14%) |
| Outdoor recreation (average 15%) | Live in West Coast Conservancy (21%) | Live in a small city/large town (11%), have an unfavourable view of DOC (7%), Not visited a DOC site in the last 12 months (11%) |
| Information to support outdoor recreation (average 8%) | Live in Canterbury Conservancy (13%) or Nelson/Marlborough Conservancy (19%) | Aged 18-24 years (4%), not visited a DOC area in the last 12 months (5%) |

Visited DOC areas

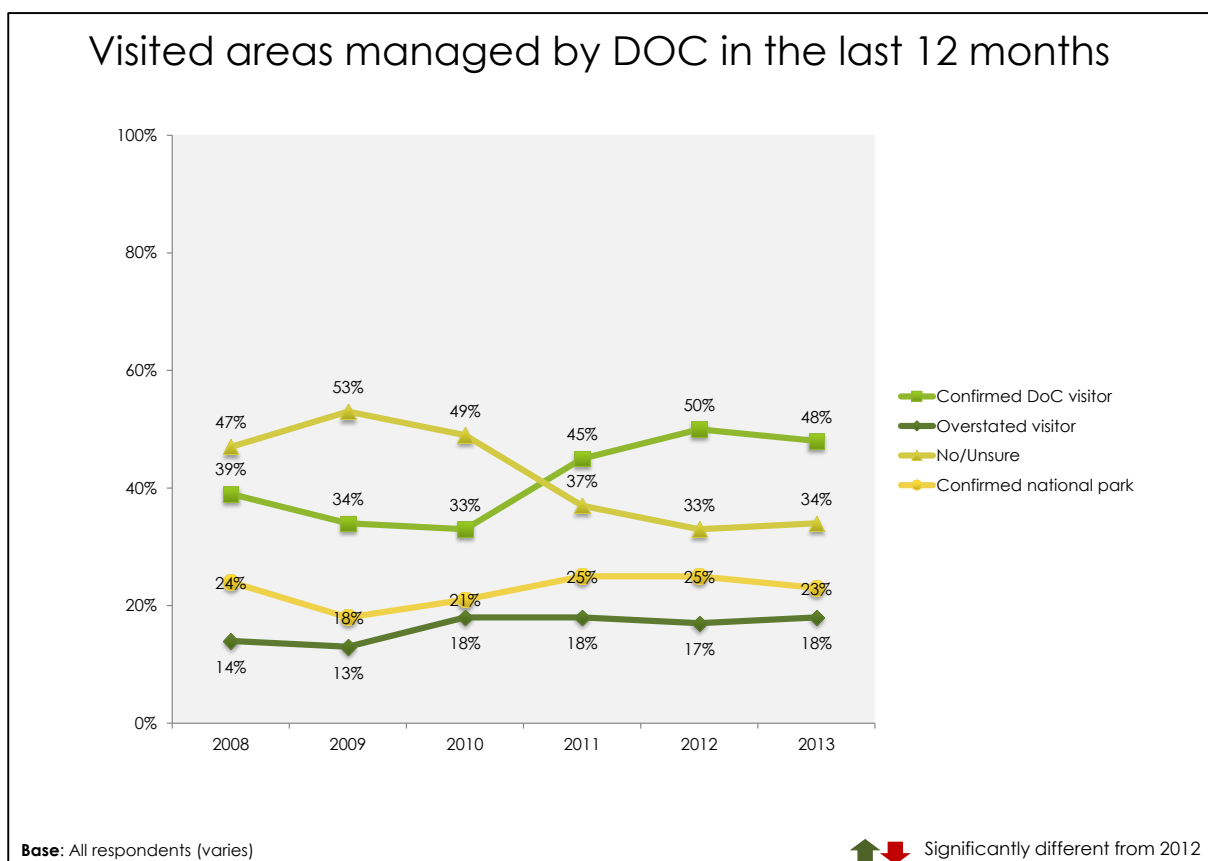
All respondents were asked whether they had visited any areas managed by the Department of Conservation in the last 12 months. Those who said yes were then asked to list both the area they had visited most recently, and any other areas they had also visited. Using these three questions, several measures were created. Firstly, 'confirmed DOC visitor' is defined as those who said they visited a DOC area and were able to list at least one DOC area when asked where they visited (or their free-text answer given in the 'other-specify' category was subsequently identified as a DOC area).

Secondly, 'overstated visitor' is defined as those who said they visited a DOC area, but did not specify a DOC area when asked to list where they had visited (and no DOC areas were identified in any free-text data given in their 'other-specify' answer).

Those who described the name of a DOC National Park in their answers were included in the definition of a 'confirmed National Park visitor'.

Figure 3 below shows the trend over time for each of these measures (including the trend over time for those saying 'no' when asked whether they had visited a DOC area).

Figure 3: Visited areas managed by DOC in the last 12 months



The proportion of respondents who have visited a DOC area in the past twelve months ('confirmed DOC visitors') has decreased slightly from 2012 (from 50% in 2012 to 48% currently) however this difference is not statistically significant. The proportion of respondents who have visited a National Park in the past twelve months has also decreased (from 25% to 23%) but this decrease is not statistically significant.

Those who are significantly more likely than average (48%) to be a confirmed visitor to a DOC area are:

- Male (53%);
- Aged 40-54 years (54%);
- Have a household income of \$60,001 or more (54%);
- Have a favourable view of DOC (52%);
- Live in a rural area (57%);
- Live in the Nelson/Marlborough Conservancy (71%), West Coast Conservancy (67%), Southland Conservancy (58%), or Tongariro/Whanganui/Taranaki Conservancy (63%).

Those who are significantly more likely than average (52%) to **not** be a confirmed visitor to a DOC area are:

- Female (57%);
- Household income up to \$40,000 per annum (61%);

Those who are significantly more likely than average (23%) to be a confirmed visitor to a National Park are:

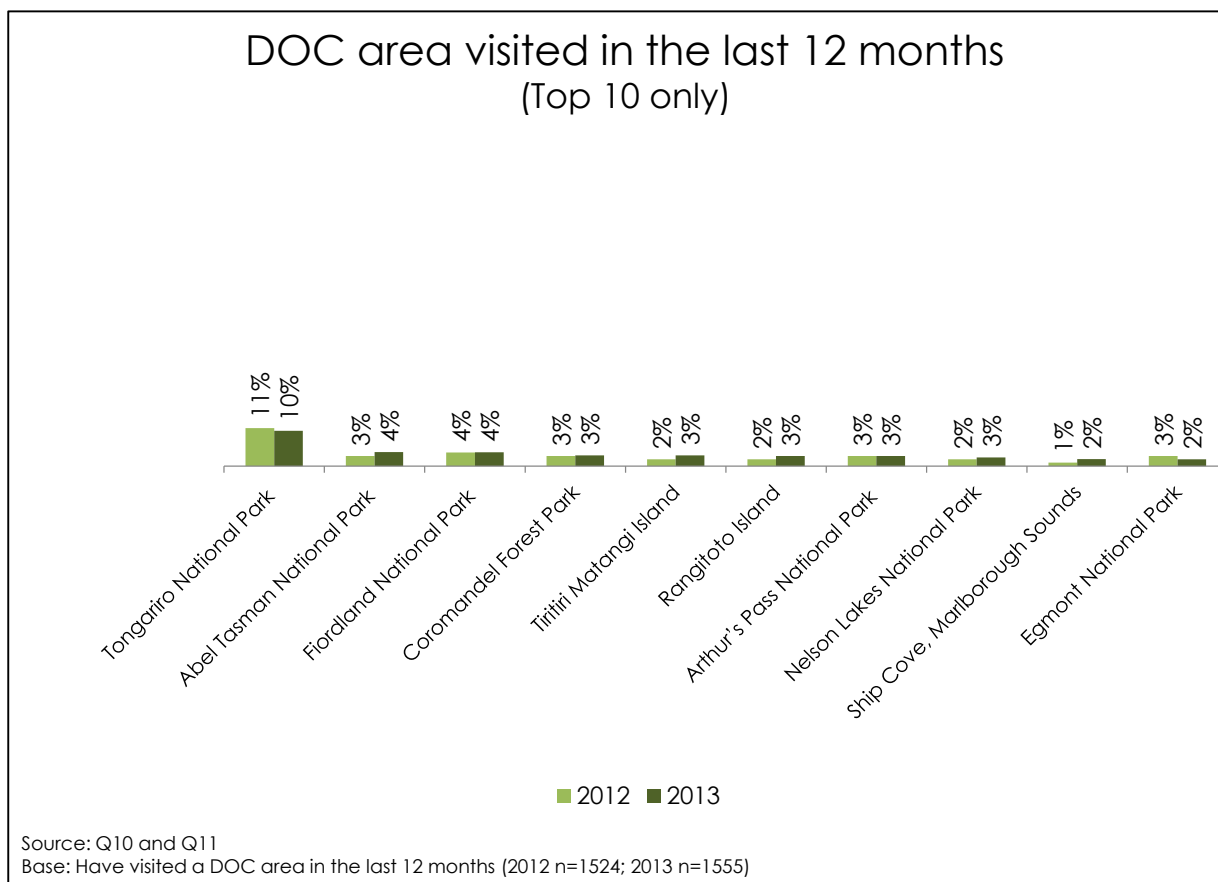
- Male (27%);
- Have a household income of \$60,001 or more per annum (29%);
- Live in a small town (29%);
- Live in the Canterbury Conservancy (32%), Nelson/Marlborough Conservancy (55%), Southland Conservancy (36%), Tongariro/Whanganui/Taranaki Conservancy (58%), or West Coast Conservancy (49%).

Those who are significantly more likely than average (77%) to **not** be a confirmed visitor to a National Park are:

- Female (81%);
- Household income of up to \$40,000 per annum (84%);
- Live in a big city (81%);
- Live in the Auckland Conservancy (89%) or Northland Conservancy (94%).

Figure 4 below shows the top ten areas mentioned when respondents were asked which DOC areas they had visited in the last 12 months (first mention and other mentions combined). Tongariro National Park remains the most frequently mentioned area (mentioned by 10% of those who have visited a DOC area in the last 12 months), followed by Abel Tasman National Park (4%), and Fiordland National Park (4%).

Figure 4: Top 10 DOC areas visited in the last 12 months



Areas visited are highly dependent on the Conservancy lived in (with respondents more likely to visit an area closer to home). Table 3 overleaf shows the top ten areas visited in each Conservancy in 2013 (the proportions represent the proportion of people who claimed to have visited a DOC area within that Conservancy).

Table 3: Top 10 DOC areas visited in the last 12 months by Conservancy

Text in green denotes significantly higher than average visitation within that Conservancy.

| Auckland | | Bay of Plenty | | Canterbury | | Nelson/Marlborough | |
|--------------------------------|-----|--------------------------------|-----|-------------------------------|-----|-------------------------------|-----|
| Unweighted total | 150 | Unweighted total | 112 | Unweighted total | 176 | Unweighted total | 154 |
| Tongariro National Park | 11% | Te Urewera National Park | 19% | Arthur's Pass National Park | 18% | Abel Tasman National Park | 34% |
| Rangitoto Island | 8% | Tongariro National Park | 12% | Aoraki/Mt Cook National Park | 9% | Kahurangi National Park | 22% |
| Tiritiri Matangi Island | 8% | Kaimai Mamaku Forest Park | 7% | Abel Tasman National Park | 8% | Nelson Lakes National Park | 22% |
| Coromandel Forest Park | 5% | Whirinaki Forest Park | 4% | Hamner Forest Park | 7% | Ship Cove, Marlborough Sounds | 16% |
| Waipoua – Tane Mahuta Big Tree | 3% | Kaimanawa Forest Park | 3% | Fiordland National Park | 6% | Mt Richmond Forest Park | 6% |
| Kaueranga Valley | 2% | Raukumara Forest Park | 3% | Godley Head – Christchurch | 5% | Fiordland National Park | 5% |
| Karangaha Gorge | 2% | Karangahake Gorge | 3% | Nelson Lakes National Park | 5% | Catlins Forest Park | 4% |
| Fiordland National Park | 2% | Waipoua – Tane Mahuta Big Tree | 2% | Ship Cove, Marlborough Sounds | 4% | Arthur's Pass National Park | 3% |
| Otago Rail Trail | 2% | Coromandel Forest Park | 2% | Westland/Tai Poutini National | 3% | Aoraki/Mt Cook National Park | 3% |
| Catlines Forest Park | 2% | Tongariro River walks | 2% | Tongariro National Park | 3% | Te Waikoropupu Springs | 3% |

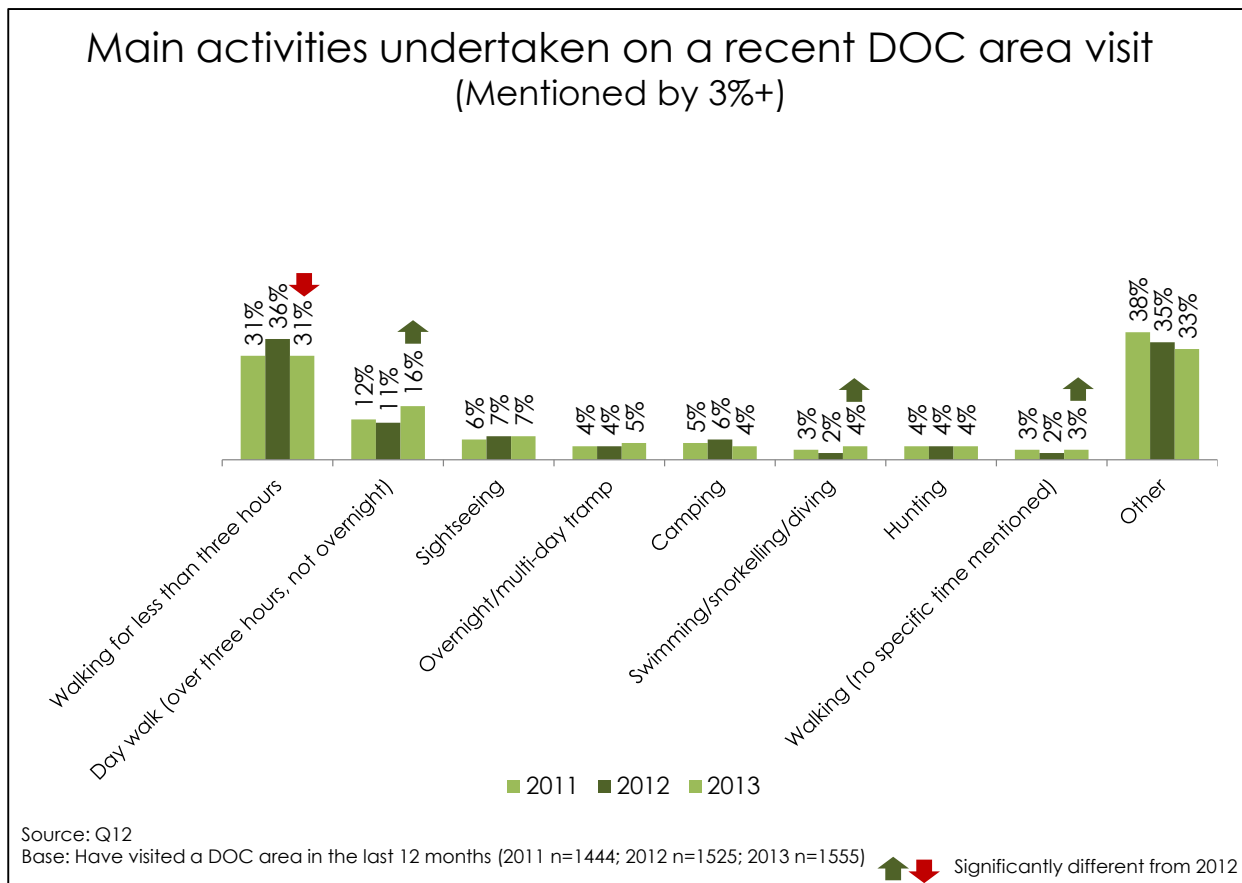
| Northland | | Otago | | Southland | | Tongariro, Whanganui, Taranaki | |
|--|-----|--|-----|--|-----|-------------------------------------|-----|
| Unweighted total | 117 | Unweighted total | 121 | Unweighted total | 159 | Unweighted total | 120 |
| Waipoua – Tane Mahuta Big Tree | 13% | Fiordland National Park | 18% | Fiordland National Park | 35% | Egmont National Park | 37% |
| Kerikeri basin – stone store | 10% | Mt Aspiring National Park | 12% | Catlins Forest Park | 14% | Tongariro National Park | 23% |
| Bream Head | 7% | Otago Central Rail Trail | 7% | Rakiura National Park – Stewart Island | 7% | Whanganui National Park | 5% |
| Urupukapuka Island - Bay of Islands | 7% | Catlins Forest Park | 6% | Mt Aspiring National Park | 6% | Fiordland National Park | 2% |
| Cape Reinga | 6% | Taiaroa Head albatross colony | 5% | Coronet Peak Skifield | 5% | Arthur's Pass National Park | 2% |
| Tongariro National Park | 5% | Arthur's Pass National Park | 4% | Arrowtown Chinese Settlement | 4% | Aoraki/Mt Cook National Park | 2% |
| Tiritiri Matangi Island | 3% | Aoraki/Mt Cook National Park | 4% | Otago Central Rail Trail | 2% | Ship Cove, Marlborough Sounds, | 2% |
| Leigh Marine Reserve | 3% | Arrowtown Chinese Settlement | 4% | Taiaroa Head albatross colony | 2% | Queen Charlotte Walkway (Ship Cove) | 2% |
| Flagstaff Hill (Russell, Bay of Islands) | 3% | Rakiura National Park – Stewart Island | 4% | Moeraki Boulders | 2% | Pureora Forest Park | 2% |
| Cape Brett | 3% | Coronet Peak Skifield | 4% | Abel Tasman National Park | 2% | Manawatu Gorge Walkway | 2% |

| Waikato | | Wellington | | West Coast | |
|---------------------------|------------|-------------------------------|------------|------------------------------------|------------|
| Unweighted total | 139 | Unweighted total | 148 | Unweighted total | 159 |
| Tongariro National Park | 15% | Tongariro National Park | 16% | Arthur's Pass National Park | 15% |
| Coromandel Forest Park | 10% | Tararua Forest Park | 12% | Paparoa National Park | 15% |
| Pirongia Forest Park | 6% | Abel Tasman National Park | 7% | Westland/Tai Poutini National Park | 13% |
| Karangahake Gorge | 5% | Rimutaka Forest Park | 7% | Kahurangi National Park | 8% |
| Pureora Forest Park | 4% | Kapiti Island Nature Reserve | 4% | Abel Tasman National Park | 6% |
| Karangahake Gorge | 3% | Ship Cove, Marlborough Sounds | 4% | Nelson Lakes National Park | 5% |
| Te Urewera National Park | 2% | Kahurangi National Park | 3% | Denniston historic mine | 5% |
| Kaimai Mamaku Forest Park | 2% | Kaweka Forest Park | 3% | Mt Aspiring National Park | 4% |
| Egmont National Park | 1% | Fiordland National Park | 3% | Hamner Forest Park | 3% |
| Whanganui National Park | 1% | Otago Central Rail Trail | 3% | Cape Foulwind – Westport | 2% |

Activities undertaken on recent visit to a DOC area

Those who had visited a DOC area (as defined by respondents) in the last 12 months were asked what activities they engaged in on their most recent visit. Activities were captured unprompted, and then coded into categories. Figure 5 below shows the summary of responses, alongside 2011 and 2012 figures.

Figure 5: Main activities undertaken on recent visit to a DOC area



Almost one third (31%) engaged in a short walk of less than three hours, and a further 16% engaged in a day walk over three hours but not overnight. Comparing 2012 to 2013, the proportion mentioning short walks has decreased (from 36% in 2012 to 31% in 2013), while the proportion mentioning day walks has increased (from 11% to 16%).

Certain groups of respondents are more likely than others to mention specific activities. Table 4 below outlines significant differences by each activity.

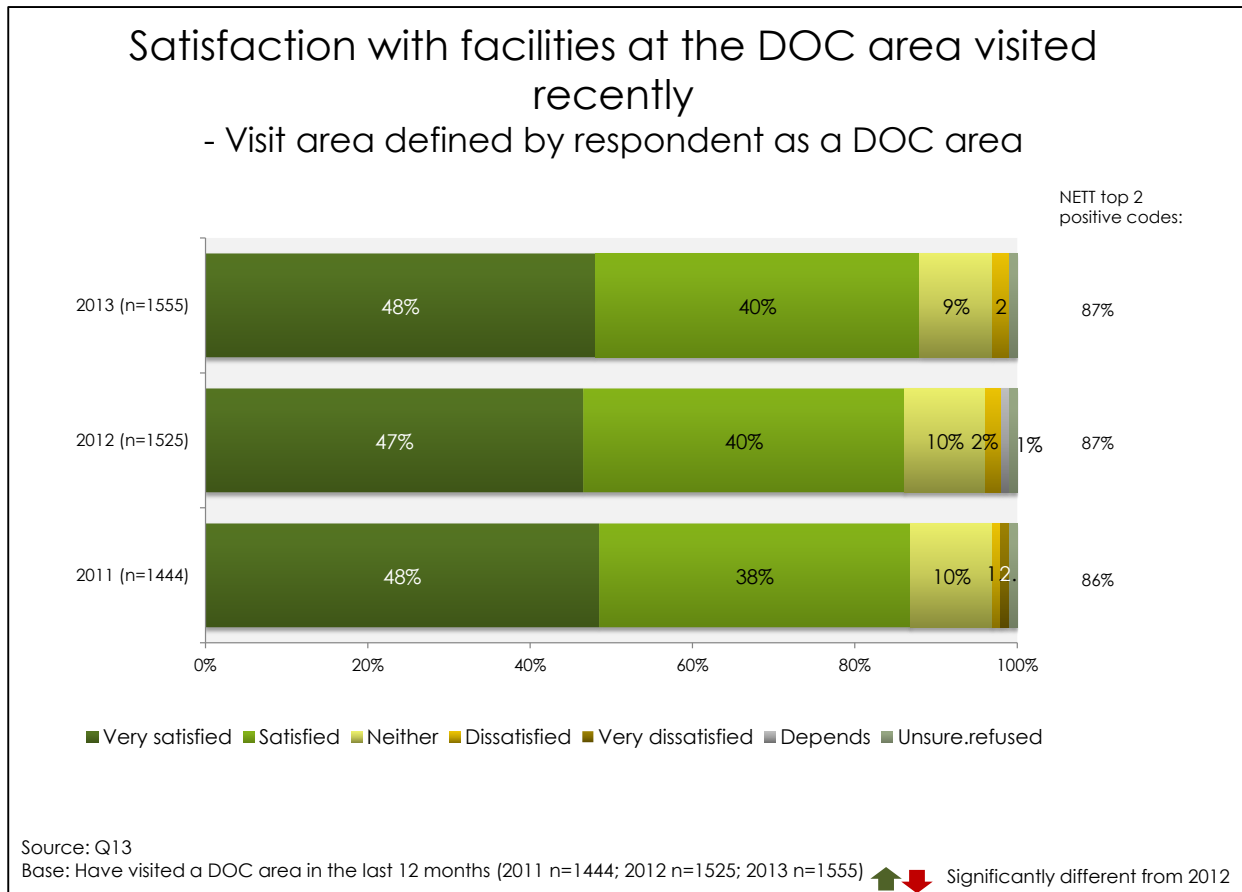
Table 4: Significant differences in activities undertaken at DOC areas

| | Groups significantly more likely than average to engage in each activity: |
|--|---|
| Walking for less than three hours (average 31%) | Female (39%) |
| Day walk (over three hours, not overnight) (average 16%) | Live in the Wellington Conservancy (26%) |
| Sightseeing (average 7%) | Aged 55 years and older (10%), Income below \$40,000 (11%), identify with Pacific ethnicity (23%) |
| Overnight/multi-day tramp (average 5%) | Aged 18-24 years (9%) |
| Camping (average 4%) | Aged 25-39 years (7%), live in the Northland Conservancy (14%) |
| Hunting (average 4%) | Male (6%), live in a rural area (10%), have an unfavourable view of DOC (18%) |

Satisfaction with facilities at DOC areas

Those who had visited a DOC area in the last 12 months were asked how satisfied they are with the facilities at the DOC area they visited most recently. Figure 6 below shows the summary of responses, alongside 2011 and 2012 figures.

Figure 6: Satisfaction with facilities at DOC areas visited



87% of respondents who say they have been to a DOC area in the past twelve months are satisfied with the facilities (48% are very satisfied). Satisfaction levels have remained constant over the past three years.

Table 5 overleaf shows overall satisfaction broken down by type of activity. We only show the most popular activities and merge together some activity categories in order to provide sufficient sample sizes. Significant differences from the norm are highlighted in green (if they are above average) or red (if they are below average).

Table 5: Overall satisfaction by broad activity categories (2013, 2012, and 2011)

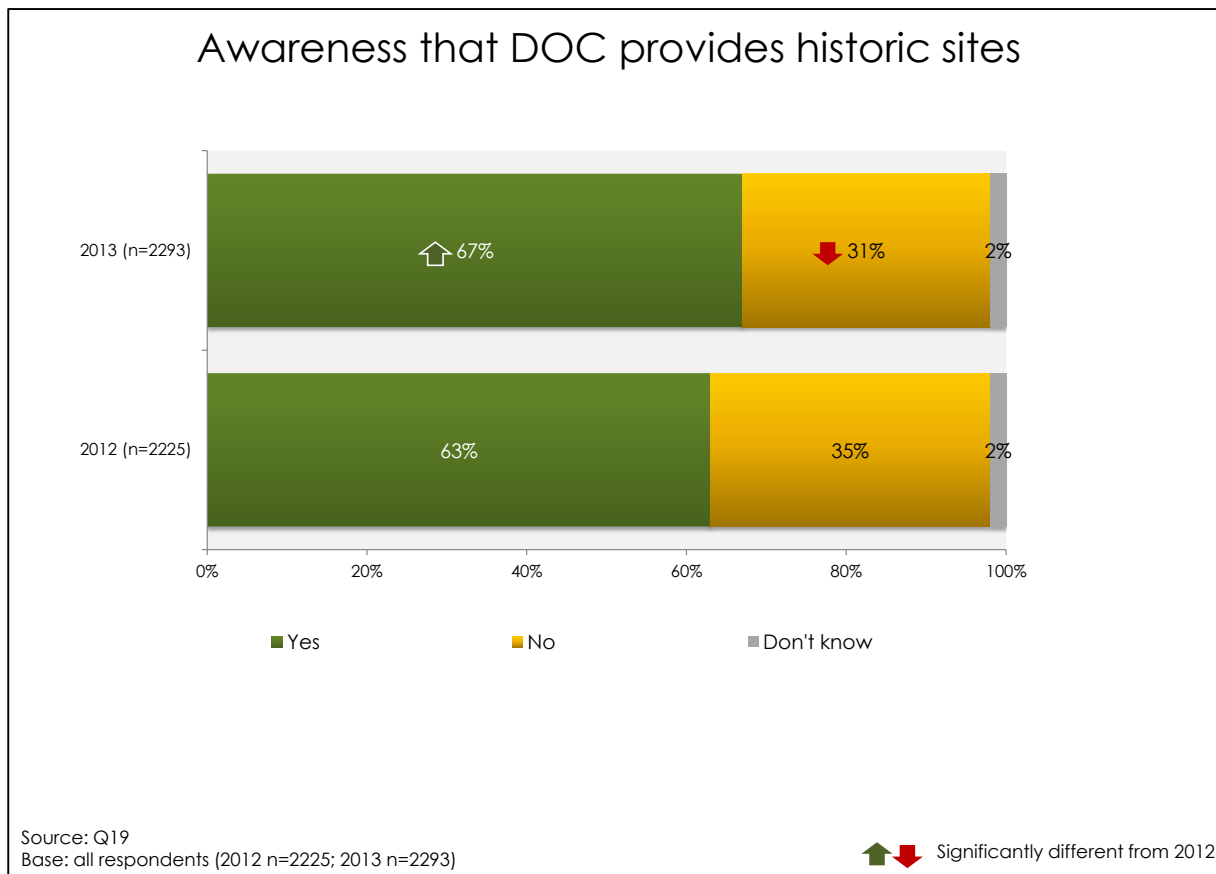
| Overall proportion either 'very satisfied' or 'satisfied' | Type of activity (note some activities are combined) | | | | | | | | |
|---|--|----------------------|---------------------------|---|--------------------------|---------|-----------------|---------|------------------------------|
| | Total | Day walk or dog-walk | Overnight/multi-day tramp | Picnics, sightseeing and family outings | Hunting or duck shooting | Fishing | Mountain biking | Camping | Swimming/diving/s norkelling |
| 2013 base size | 1555 | 807 | 73 | 183 | 87 | 47 | 39 | 72 | 41 |
| 2013 % | 87% | 91% | 93% | 87% | 64% | 79% | 92% | 89% | 87% |
| 2012 base size | 1525 | 804 | 52 | 170 | 77 | 60 | 34 | 81 | 29 |
| 2012 % | 87% | 88% | 99% | 83% | 81% | 76% | 89% | 92% | 71% |
| 2011 base size | 1444 | 703 | 62 | 150 | 81 | 60 | 27 | 71 | 24 |
| 2011 % | 86% | 87% | 93% | 83% | 73% | 73% | 69% | 96% | 97% |

The data suggests that walkers are the most satisfied, particular overnight trampers. Hunters and fishers tend to be the least satisfied.

Awareness of DOC historic sites

Respondents were also asked whether they were aware that DOC provides historic sites. Figure 7 below shows the 2013 findings compared against the 2012 findings. (Questions about historic sites were not asked in the 2011 survey).

Figure 7: Awareness that DOC provides historic sites



The proportion aware that DOC provides historic sites has increased significantly since 2012 (63% to 67%).

Those who are significantly more likely than average (67%) to say that they are aware that DOC provides historic sites include:

- Aged 55 years or older (80%);
- Identify with Maori ethnicity (78%);
- Live in a small town (73%);
- Live in the Northland Conservancy (76%), the West Coast Conservancy (80%), or the Waikato Conservancy (74%).

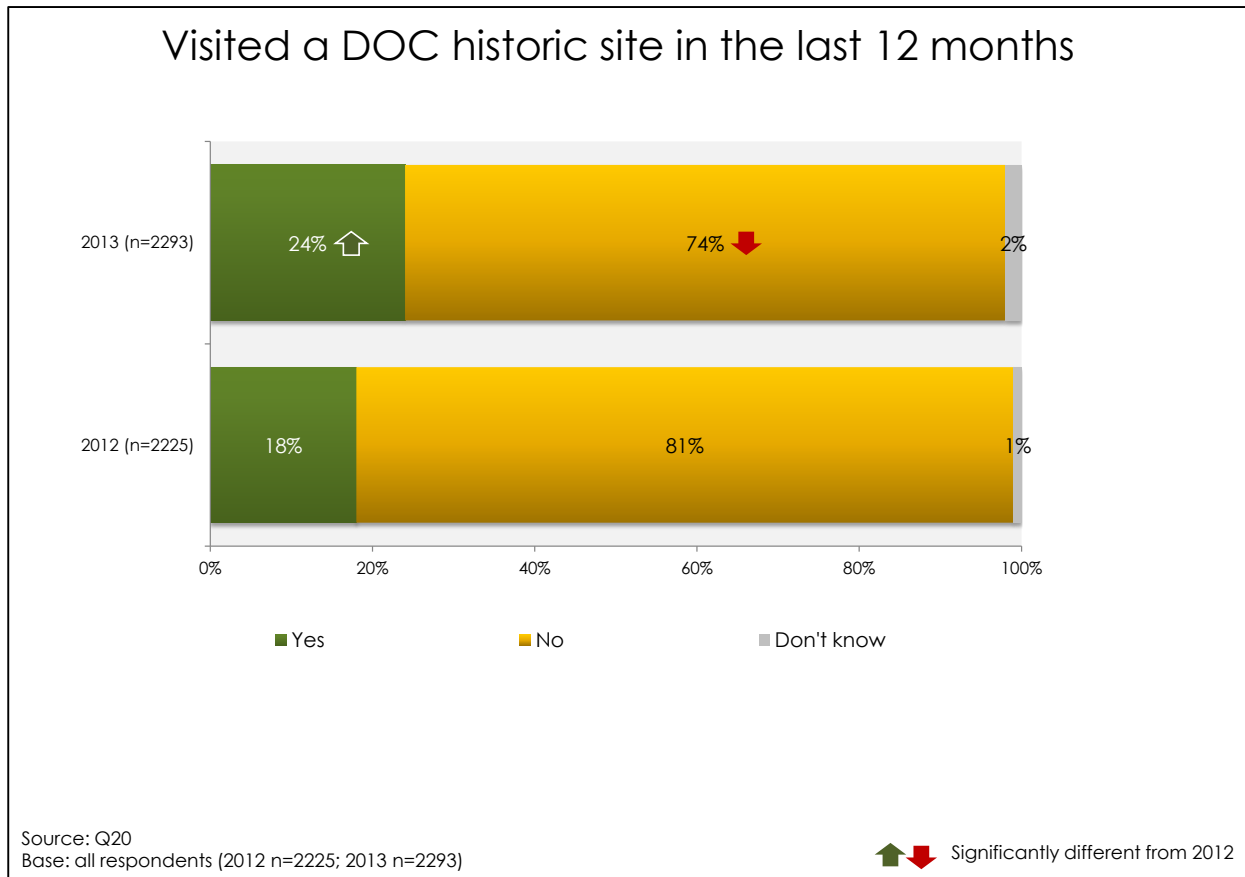
Those who are significantly more likely than average (31%) to say they are not aware that DOC provides historic sites include:

- Aged 18-24 years (46%), aged 25-39 years (40%);
- Identify with Pacific ethnicity (51%);
- Have not visited a DOC area in the last 12 months (36%);
- Live in the Otago Conservancy (42%).

Visited a DOC historic site

Respondents were asked whether they had visited a DOC historic site in the last 12 months. The following sites were given as examples to respondents: Cape Reinga, the Bridge to Nowhere on the Wanganui river, and the Central Otago Rail Trail. Figure 8 below shows the summary of responses and comparison to 2012 figures.

Figure 8: Visited a DOC historic site in the last 12 months



The proportion who have visited a DOC historic site in the last 12 months has increased from 18% to 24%.

Those who are significantly more likely than average (24%) to say they have visited a DOC historic site in the last 12 months include:

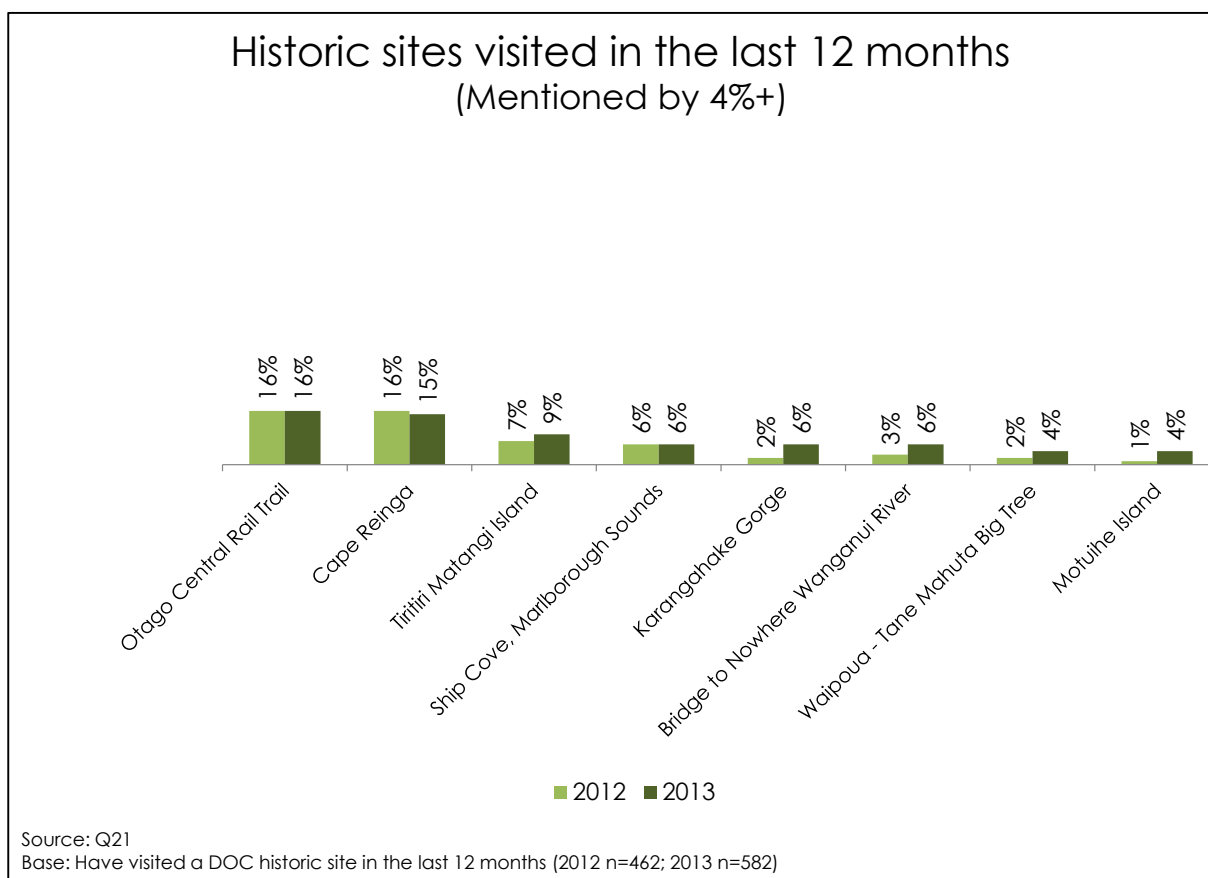
- Those aged 40-54 years (29%);
- Those with a household income of \$60,001 or more per annum (29%);
- Those who live in the Northland Conservancy (43%), Otago Conservancy (34%), or West Coast Conservancy (34%).

Those who are significantly more likely than average (74%) to say they have **not** visited a DOC historic site in the last 12 months include:

- Those aged 18-24 years (80%);
- Those with a household income of \$40,001 to \$60,000 per annum (82%);
- Those who live in the Bay of Plenty Conservancy (82%), Canterbury Conservancy (81%), or Wellington Conservancy (81%).

Those who said they had visited a DOC historic site in the last 12 months were asked to list the sites they had visited. Figure 9 below shows the areas mentioned by at least 4% of respondents and provides a comparison to the 2012 figures.

Figure 9: Historic sites visited in the last 12 months

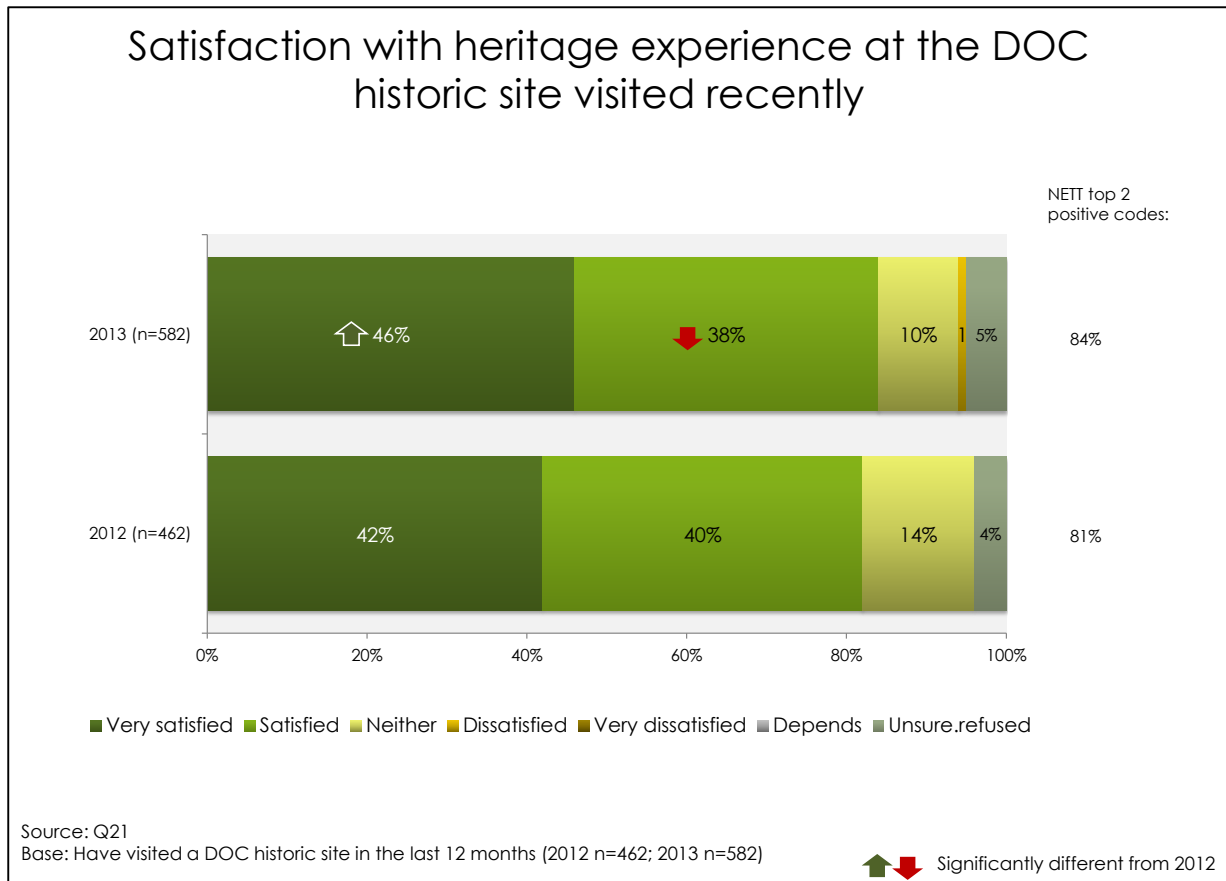


Of those who have visited a historic site, the Otago Central Rail Trail and Cape Reinga are the sites most likely to be mentioned (by 16% and 15% respectively).

Satisfaction with the heritage experience at the DOC historic site visited recently

Respondents who said they had visited a historic site were asked how satisfied they are with the heritage experience on their most recent visit. Figure 10 below shows both 2013 and 2012 satisfaction ratings.

Figure 10: Satisfaction with heritage experience at historic sites

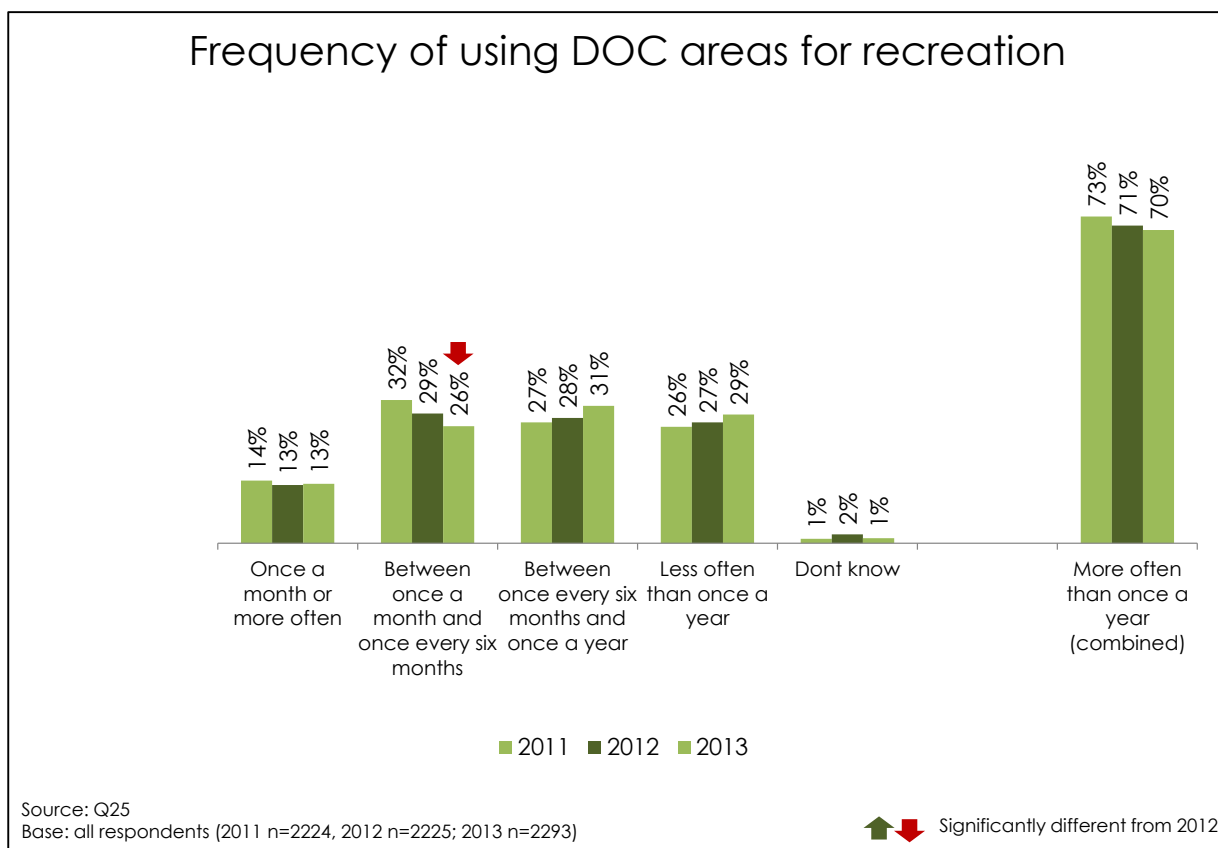


As shown – the proportion saying ‘very satisfied’ has increased significantly from 2012 to 2013 (from 42% in 2012 to 46% in 2013). There has been no statistically significant change in the combined proportion that are either ‘very satisfied’ or ‘satisfied’ (the ‘top two’ most positive codes on the response scale).

Frequency of using DOC areas for recreation

All respondents were asked how often they use DOC areas for recreation, and a list of response options relating to frequency read out. Figure 11 below shows responses, and compares these to both 2011 and 2012 figures.

Figure 11: Frequency of using DOC areas for recreation



There has been a reduction in the proportion of respondents in the '1 month – 6 months' category between 2012 and 2013 (from 29% to 26%).

Over the past three years there has been a downward trend in the proportion of respondents who say they have used DOC areas for recreation 'in the past six months' (47% in 2011, 43% in 2012 and 39% in 2013).

Some significant differences exist in the demographic profiles of those who visit DOC at different frequency levels. 6 below shows the groups who are more likely than average to say they are using DOC areas at each frequency.

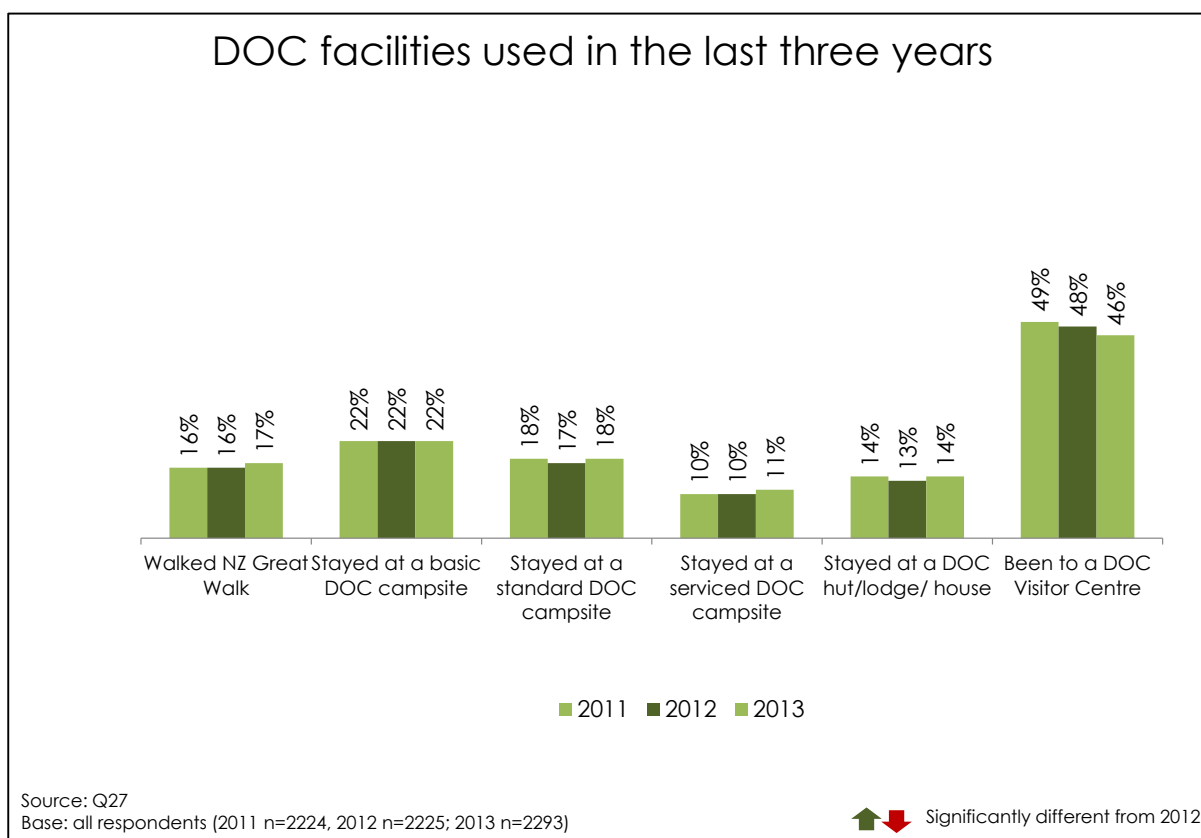
Table 6: Significant difference in frequency of using DOC areas

| | Groups significantly more likely than average to use DOC areas at each of the following frequencies: |
|--|---|
| Once a month or more often (13%) | Aged 25-39 years (17%), live in a small town (19%), live in the Nelson/Marlborough Conservancy (18%) or West Coast Conservancy (24%) |
| Between once a month and once every six months (26%) | Male (31%), aged 25-54 years (31%), household income of \$60,001 or more per annum (31%), household with children (31%), have a favourable view of DOC (30%), live in the Nelson/Marlborough Conservancy (34%), or West Coast Conservancy (34%) |
| Between once every six months and once a year (31%) | - |
| Less often than once a year (29%) | Aged 55 years or older (40%), household income of \$40,000 or less per annum (35%), household with no children (34%), live in the Wellington Conservancy (36%) |

DOC facilities used in the last three years

All respondents were read a list of activities and asked which ones they have done/used in the last three years. Figure 1 below shows the summary of responses, and comparative figures from 2011 and 2012.

Figure 12: DOC facilities used in the last three years



There has been no statistically significant changes in the proportion of respondents using each of DOC's facilities in the past twelve months. However, there has been a downward trend in the proportion of respondents saying they have been to a DOC Visitor Centre in the past twelve months, and the proportion in 2013 (46%) is now significantly lower than the equivalent proportion in 2011 (49%).

Looking at the different demographic groups, there are significant differences in the groups who are more (and less) likely to have engaged in each activity in the last three years. Table 7 below shows those significant differences.

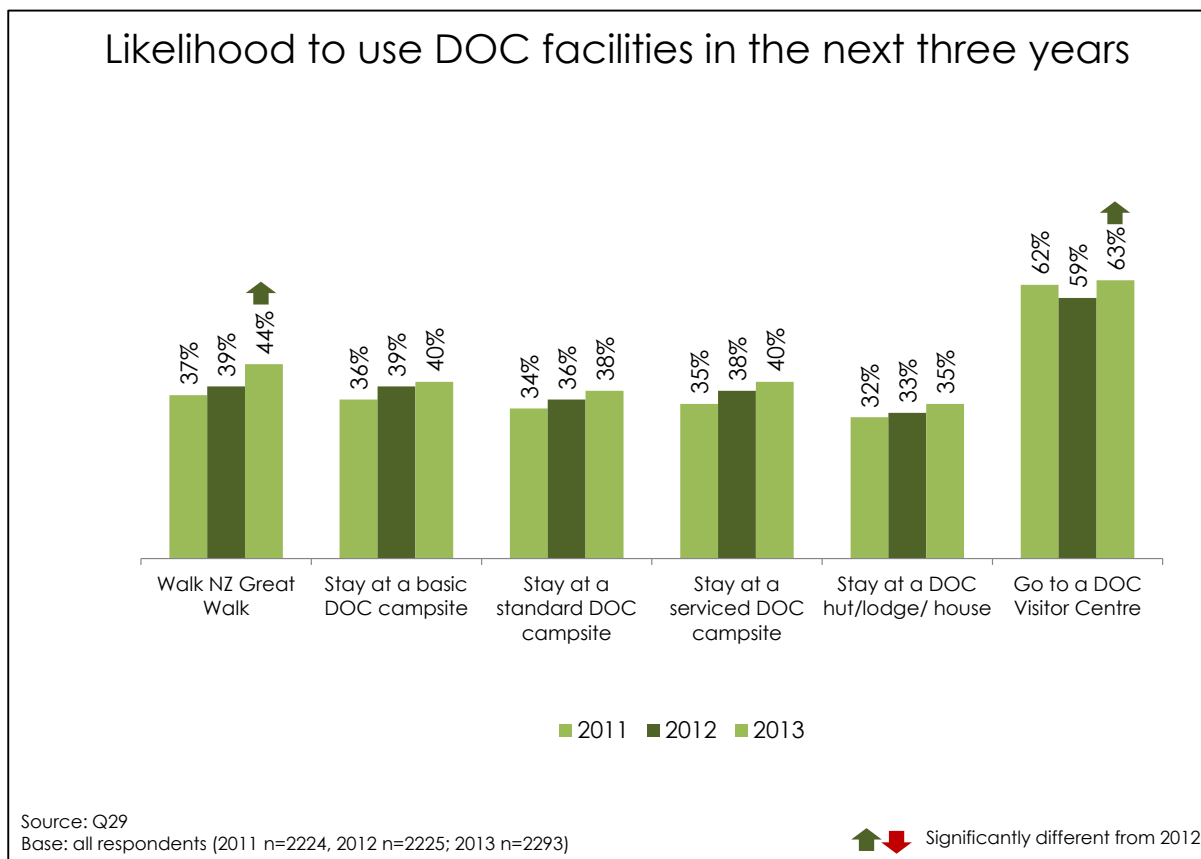
Table 7: Significant differences in DOC facilities used in the last three years

| | Groups significantly more likely than average to have used each facility: | Groups significantly less likely than average to have used each facility: |
|---|--|--|
| Walked a Great Walk (average 17%) | Household income \$60,001 or more per annum (20%), have a favourable view of DOC (19%), Live in the Nelson/Marlborough Conservancy (37%) or Otago Conservancy (24%) | Live in the Northland Conservancy (6%) |
| Stayed at a basic campsite (average 22%) | Male (26%), household income of \$60,001 or more per annum (26%), have a favourable view of DOC (25%), live in the Nelson/Marlborough Conservancy (32%), household with children (26%) | Female (18%), aged 55 years or older (16%), identify with Asian ethnicity (8%) or Pacific ethnicity (4%), household income of up to \$40,000 per annum (14%), live in the Tongariro/Whanganui/Taranaki Conservancy (15%) |
| Stayed at a standard DOC campsite (average 18%) | Aged 18-24 years (28%) or 25-39 years (23%), live in the Nelson/Marlborough Conservancy (27%) or Northland Conservancy (40%) | Aged 55 years or older (11%), household income of up to \$40,000 per annum (13%), live in the Tongariro/Whanganui/Taranaki Conservancy (11%) or Southland Conservancy (11%) |
| Stayed at a serviced DOC campsite (average 11%) | Aged 18-24 years (19%) | Aged 55 years or older (8%), household income of up to \$40,000 per annum (7%) |
| Stayed at a DOC hut/lodge/house (average 14%) | Male (17%), aged 18-24 years (20%), household income of \$60,001 or more per annum (17%), live in the Southland Conservancy (20%), West Coast Conservancy (21%), or Nelson/Marlborough Conservancy (26%) | Female (12%), aged 55 years or older (10%), identify with Maori ethnicity (9%), household income of up to \$40,000 per annum (10%) |
| Been to a DOC Visitor Centre (average 46%) | Male (51%), aged 40-54 years (56%), household income of \$60,001 or more per annum (54%), have a favourable view of DOC (52%), live in the Nelson/Marlborough Conservancy (64%) or West Coast Conservancy (61%), household with children (52%) | Female (42%), aged 18-24 years (31%), identify with Pacific ethnicity (20%) or Maori ethnicity (39%), household income of up to \$40,000 per annum (38%), live in the Bay or Plenty Conservancy (35%) or Northland Conservancy (35%), household without children (42%) |

Likelihood to use DOC facilities in the next three years

In addition, respondents were asked to indicate whether or not they are likely to use each facility in the next three months. Figure 13 below shows a summary of responses, alongside figures from 2011 and 2012.

Figure 13: Likelihood to use DOC facilities in the next three years



Intention to do a Great Walk in the next three years has increased from 37% to 44% and intention to go to a DOC Visitor Centre in the next three years has increased from 59% to 63%.

Several groups of respondents are more likely than average to say they intend to engage in each activity in the next three years. Table 8 below outlines these significant differences.

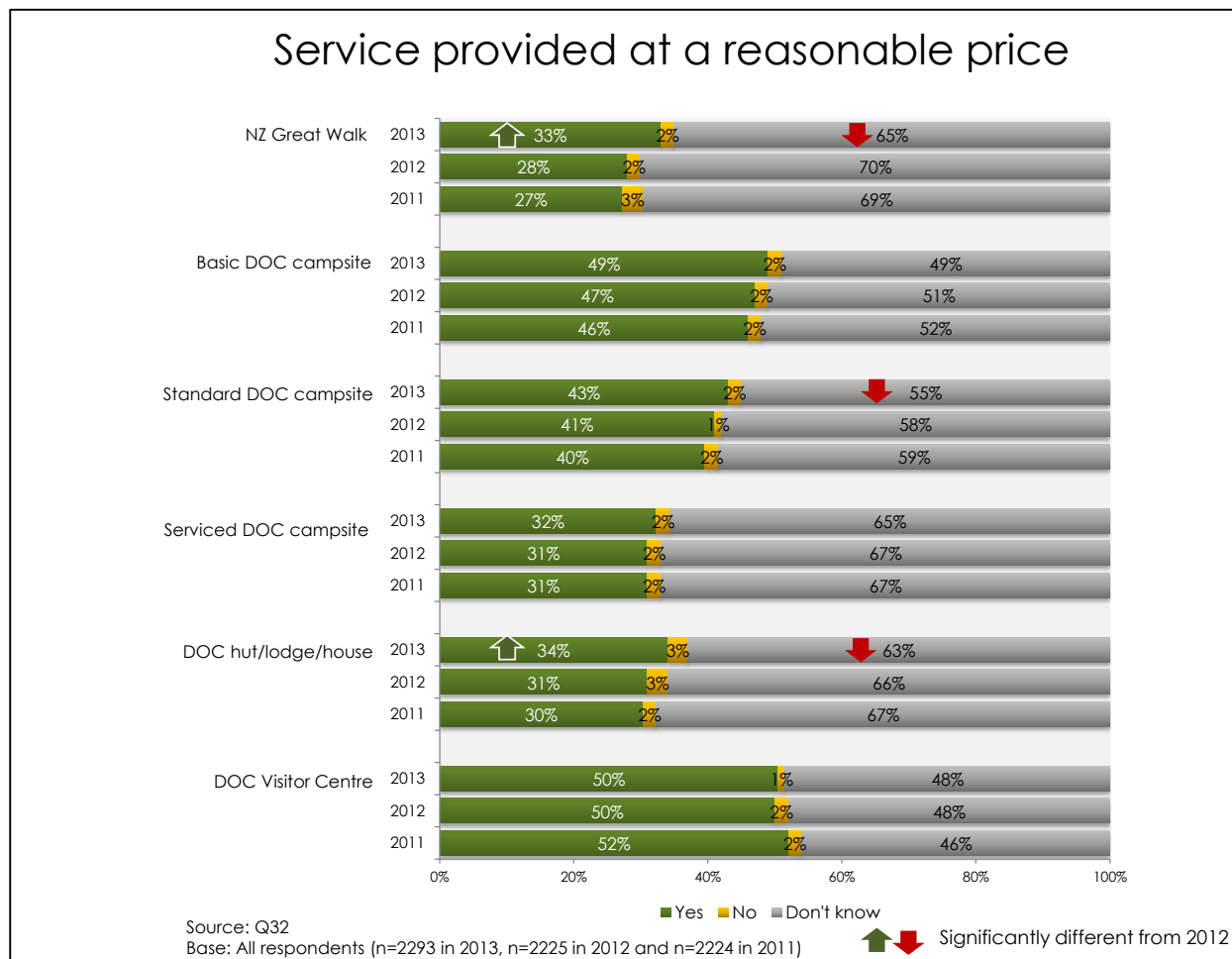
Table 8: Significant differences in likelihood to visit DOC areas in the next three years

| | Groups significantly more likely than average to say they will use each facility: |
|---|---|
| Walk a Great Walk (average 44%) | Identify with Asian ethnicity (80%), household income of \$60,001 or more per annum (55%), have a favourable view of DOC (50%), live in a big city (51%), live in the Nelson/Marlborough Conservancy (50%), household with children (50%) |
| Stay at a basic campsite (average 40%) | Male (46%), aged 18-24 years (50%) 25-39 years (47%) or 40-54 years (48%), household income of \$60,001 or more per annum (48%), have a favourable view of DOC (45%), live in the Nelson/Marlborough Conservancy (50%), household with children (48%) |
| Stay at a standard DOC campsite (average 38%) | Male (42%), aged 18-24 years (48%) 25-39 years (47%) or 40-54 years (45%), household income of \$60,001 or more per annum (46%), have a favourable view of DOC (43%), live in the Nelson/Marlborough Conservancy (51%), household with children (46%) |
| Stay at a serviced DOC campsite (average 40%) | Aged 25-39 years (46%) or 40-54 years (45%), household income of \$60,001 or more per annum (48%), have a favourable view of DOC (44%), live in a big city (46%), households with children (46%) |
| Stay at a DOC hut/lodge/house (average 35%) | Aged 25-39 years (41%), household income of \$60,001 or more per annum (42%), have a favourable view of DOC (39%), households with children (40%) |
| Go to a DOC Visitor Centre (average 63%) | Aged 25-39 years (68%) or 40-54 years (71%), household income of \$60,001 or more per annum (73%), have a favourable view of DOC (70%), households with children (73%), live in the West Coast Conservancy (76%) |

Perceptions about the price of DOC services being reasonable

All respondents were asked whether they believe each service is provided by DOC at a reasonable price. Figure 14 below shows the summary of responses against comparative figures from 2012.

Figure 14: Perception of services provided at a reasonable price



Very few respondents believe that any of the services are **not** provided at a reasonable price – at most just 3% say that DOC huts/lodges are not reasonably priced. For the most part the prices are either seen as reasonable, or respondents don't know whether the services are provided at a reasonable price.

In 2013 there has been a significant increase in the proportion saying that the Great Walks are provided at a reasonable price (from 28% in 2012 to 33% in 2013). There has also been an increase in perception that DOC huts and lodges are provided at a reasonable price (from 31% to 34%).

Several groups were more likely than average to say that each service is provided at a reasonable price. Table 9 below outlines these significant differences.

Table 9: Significant differences in perception of reasonable price

| | Groups significantly more likely than average to say the service is provided at a reasonable price: |
|---|---|
| Walk a Great Walk (average 33% say yes the service is provided at a reasonable price) | Male (37%), income \$60,001 or more per annum (38%), have a favourable view of DOC (38%), live in the Nelson/Marlborough Conservancy (42%) |
| Stay at a basic campsite (average 49%) | Aged 40-54 years (57%), income \$60,001 or more per annum (56%), live in a rural area (55%), households with children (55%), have a favourable view of DOC (57%), live in the Nelson/Marlborough Conservancy (64%) or Northland Conservancy (61%) |
| Stay at a standard DOC campsite (average 43%) | Aged 40-54 years (49%), income \$60,001 or more per annum (49%), have a favourable view of DOC (49%), live in the Nelson/Marlborough Conservancy (57%) |
| Stay at a serviced DOC campsite (average 32%) | Have a favourable view of DOC (37%), live in the Nelson/Marlborough Conservancy (48%) |
| Stay at a DOC hut/lodge/house (average 34%) | Household income \$60,001 or more per annum (38%), live in a rural area (40%), have a favourable view of DOC (40%), live in the Nelson/Marlborough Conservancy (46%) |
| Go to a DOC Visitor Centre (average 50%) | Aged 40-54 years (58%), income \$60,001 or more per annum (57%), households with children (55%), have a favourable view of DOC (58%), live in the Nelson/Marlborough Conservancy (62%) or the Canterbury Conservancy (57%) |

Appendix 1: Total Sample Profile

The survey sample was stratified and then post-weighted to match the actual population distribution (based on 30 June 2012 population estimates obtained from Statistics New Zealand) by:

- 1) Ethnicity (at a Conservancy level)
- 2) Interlocking age and gender¹ (at a Conservancy level).

The sample included a minimum of 150 people in each Conservancy – to allow for Conservancy level analysis. In the total sample the Conservancy data was weighted to match the actual population distribution (based on population estimates provided by Statistics New Zealand).

Table 5: Profile of total sample

| Sample profile (unweighted numbers and weighted %) | | Sample Size | | | Distribution | | |
|---|----------------------------|-------------|------------|------------|--------------|--------|--------|
| | | 2013 n= | 2012 n= | 2011 n= | 2013 % | 2012 % | 2011 % |
| Total | | 2293 | 3885 | 1732 | 100% | 100% | 100% |
| Gender | Male | 1109 | 1825 | 1732 | 49% | 48% | 48% |
| | Female | 1184 | 2060 | 1882 | 51% | 52% | 52% |
| Age | Up to age 24 | 302 | 397 | 435 | 14% | 15% | 12% |
| | 25-39 | 524 | 1014 | 1028 | 23% | 28% | 28% |
| | 40-54 | 706 | 1150 | 1012 | 31% | 28% | 28% |
| | 55 plus | 761 | 1320 | 1120 | 32% | 28% | 31% |
| Ethnicity | Pakeha | 2065 | 3406 | 3198 | 85% | 83% | 88% |
| | Maori | 208 | 372 | 405 | 12% | 11% | 11% |
| | Pacific | 32 | 57 | 99 | 2% | 3% | 3% |
| | Asian | 50 | 107 | 152 | 4% | 5% | 4% |
| | Other | 72 | 114 | 178 | 4% | 3% | 5% |
| Household income (per annum) | Income up to \$40,000 | 506 | 931 | 729 | 20% | 21% | 20% |
| | Income \$40,001 - \$60,000 | 393 | 693 | 591 | 15% | 17% | 16% |
| | Income \$60,001 plus | 1123 | 1757 | 1837 | 52% | 48% | 51% |
| Location | Big City | 513 | 877 | 1698 | 42% | 43% | 47% |
| | Small city/Large town | 768 | 1326 | 977 | 25% | 27% | 27% |
| | Small town | 579 | 1028 | 595 | 18% | 18% | 16% |
| | Rural | 430 | 644 | 334 | 15% | 12% | 9% |

¹ For each Conservancy the population in each age group of both males and females was calculated as a proportion of the total population. The proportions were then applied to the total sample to determine target quotas for both males and females by age group for each Conservancy.

| | | | | | | | |
|----------------|-----------------------------------|------|------|------|-----|-----|-----|
| Household type | Family with kids | 917 | 1250 | 1132 | 41% | 33% | 31% |
| | All other households | 1376 | 2635 | 2483 | 59% | 67% | 69% |
| Conservancy | Auckland | 217 | 347 | 1156 | 34% | 32% | 32% |
| | Bay of Plenty | 187 | 355 | 269 | 7% | 8% | 7% |
| | Canterbury | 268 | 354 | 482 | 13% | 13% | 13% |
| | Nelson/Marlborough | 191 | 352 | 119 | 3% | 3% | 3% |
| | Northland | 184 | 358 | 128 | 3% | 4% | 4% |
| | Otago | 190 | 356 | 184 | 5% | 5% | 5% |
| | Southland | 227 | 359 | 82 | 2% | 2% | 2% |
| | Tongariro, Whanganui, Taranaki | 171 | 330 | 278 | 5% | 6% | 8% |
| | Waikato | 193 | 350 | 308 | 8% | 9% | 9% |
| | Wellington | 269 | 378 | 571 | 18% | 18% | 16% |
| | West Coast | 196 | 346 | 28 | 1% | 1% | 1% |