Department of Conservation
National Survey

Report 2:
Destination Management Framework

Survey conducted:
June 2011

Reporting produced:
September 2011
Contents

1.0 Summary ..................................................................................................................................... 3

2.0 Findings ....................................................................................................................................... 5

  2.1 Awareness of DOC recreation services ................................................................. 5
  2.2 DOC services ...................................................................................................................... 6
  2.3 Visited DOC areas ............................................................................................................... 8
  2.4 Activities undertaken at recent visit to DOC area ...................................................... 10
  2.5 Satisfaction with facilities at DOC area ........................................................................... 11
  2.6 Visiting DOC area in home Conservancy ....................................................................... 12
  2.7 Likelihood to visit a DOC area for recreation in the future .......................................... 14
  2.8 DOC facilities used in the last three years ................................................................. 15
  2.9 Likelihood to use DOC facilities in the next three years ............................................ 17
  2.10 Price of facilities .............................................................................................................. 19
  2.11 Information about facilities ............................................................................................ 20
  2.12 DOC Gateways .................................................................................................................. 21

3.0 Conclusions ................................................................................................................................ 22

4.0 Methodology ................................................................................................................................ 25
1.0 Summary

Seventy-eight percent of New Zealanders were aware that DOC provides recreation services. The DOC services New Zealanders were most aware of were: tramping/tracks/hiking (58%), huts/cabins (40%) and camping areas (30%). Five percent were not aware of any services provided by DOC.

Fifty-one percent\(^1\) of New Zealanders had visited a DOC area and 28 percent had visited a National Park in the last 12 months. The groups of people who were statistically significantly more likely to be a confirmed visitor to a DOC area were:

- 25-54 years
- Income $60,001 plus
- Rural
- Favourable view of DOC.

The groups of people who were statistically significantly more likely to not be a confirmed visitor to a DOC area were:

- 18-24 years, 55 years plus
- All ethnicities other than Pakeha
- Income below $40,000.

The most popular activities for New Zealanders visiting DOC areas were: walks for less than 3 hours (29%), day walks (12%) and sightseeing (11%). Most people (88%) were satisfied with the facilities at the DOC area they most recently visited. Just two percent were not satisfied.

Seventy-one percent of New Zealanders said they are likely to visit a DOC area for recreation in the future. The following groups were statistically significantly more likely to say they will visit a DOC area for recreation in the future: 25-54 years, income $60,001 plus and favourable view of DOC.

Just under half of New Zealanders had visited a DOC area in their home Conservancy in the last 12 months. Just over half (56%) of New Zealanders say they were likely to visit a DOC area in their home Conservancy within the next 12 months. The following groups were statistically significantly more likely to say they will visit a DOC area in their home Conservancy:

- Male
- 25-54 years
- Income $60,001 plus
- Favourable view of DOC
- Visited DOC area in past 12 months.

The following groups were statistically significantly more likely to say they will not visit a DOC area in their home Conservancy:

\(^1\) The DOC 2010/2011 Annual Report shows a lower figure for this finding, the lower figure represents only the telephone sample and only the ’most recent visit’ to a DOC area. The figure in this report includes the online sample and includes both the ’most recent visit’ and ‘other visits’ in the last 12 months to a DOC area.
• 55 years plus
• Income below $40,000
• Small town
• Unfavourable view of DOC
• Not visited DOC area in past 12 months.

Just over half (51%) of New Zealanders had visited a DOC Visitor Centre within the last three years. Twenty-one percent had stayed at a basic DOC campsite. Less than 20 percent had: stayed at a standard DOC campsite (17%), walked a NZ Great Walk (15%), stayed at a DOC hut/lodge/house (13%) and/or stayed at a serviced DOC campsite (10%). Satisfaction with facilities was high for all facilities, ranging from 80 percent satisfaction for basic DOC campsites to 94 percent for NZ Great Walks.

Sixty percent of New Zealanders said they were likely to visit a DOC Visitor Centre within the next three years. Around a third said they were likely to use a NZ Great Walk (35%), serviced DOC campsite (33%), basic DOC Campsite (30%), DOC hut/lodge/house (30%) and/or a standard DOC campsite (28%).

Of those who were aware of the price of using DOC facilities, nearly all thought the facilities were provided at a reasonable price. Most New Zealanders thought it would be easy to find out information about DOC facilities if they wanted to know more.

Respondents were asked if they were likely to visit a DOC Gateway within the next 12 months (Gateways were described as ‘a DOC place that is family friendly where you can do a range of activities’). Just under a third (31%) said they were likely to visit a DOC Gateway. Just over a third said they were unlikely to visit a DOC Gateway (39%) and the remainder (30%) said they did not know.
2.0 Findings

2.1 Awareness of DOC recreation services

Seventy-eight percent of New Zealanders were aware that DOC provides recreation services.

People who were significantly more likely to say they were aware DOC provides recreation services were:

- 55 years plus
- Pakeha
- Income $60,001 plus
- Favourable view of DOC
- Visited DOC area in last 12 months.

People who were significantly more likely to say they were not aware DOC provides recreation services were:

- 18-39 years
- All ethnicities other than Pakeha
- Not visited DOC area in last 12 months.

Aware that DOC provides recreation services
2.2 DOC services

The DOC services New Zealanders were most aware of were: tramping/tracks/hiking (58%), huts/cabins (40%) and camping areas (30%). Five percent were not aware of any services provided by DOC. The groups that were statistically significantly most likely to say they did not know what the services are were:

- 18-24 years
- Pacific, Asian
- Not visited a DOC area in the last 12 months.

A full list of significant differences follows in the table overleaf. This table shows the groups that were statistically significantly more likely to mention each service.
Significantly more likely to mention:

<table>
<thead>
<tr>
<th>Activity Type</th>
<th>Age Range</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tracks/walks/tramping/hiking</td>
<td>25-39</td>
<td>years</td>
</tr>
<tr>
<td>Huts/cabins</td>
<td>Male,</td>
<td>unfavourable view of DOC</td>
</tr>
<tr>
<td>Camping areas</td>
<td>25-39</td>
<td>years, big city, favourable view of DOC</td>
</tr>
<tr>
<td>Information to support recreation</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>Visitor Centres/Information Centres</td>
<td>Male,</td>
<td>40-54 years, income $60,001 +, visited DOC area in last 12 months</td>
</tr>
<tr>
<td>Wildlife conservation</td>
<td>55 years</td>
<td>+, rural</td>
</tr>
<tr>
<td>Parks/reserves</td>
<td>40-54</td>
<td>years</td>
</tr>
<tr>
<td>Education</td>
<td>Other</td>
<td>ethnicities, unfavourable view of DOC</td>
</tr>
<tr>
<td>National Parks</td>
<td>40-54</td>
<td>years, big city</td>
</tr>
<tr>
<td>Recreation areas/outdoor recreation</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>Don't know</td>
<td>18-24</td>
<td>years, Pacific, Asian, not visited DOC area in last 12 months</td>
</tr>
</tbody>
</table>
2.3 Visited DOC areas

Fifty-one percent of New Zealanders had visited a DOC area in the last 12 months. A further 12 percent stated they had visited a DOC area in the last 12 months but the area they had been to was audited as not being a DOC area. Twenty-eight percent of respondents were confirmed as having visited a National Park in the last 12 months.

There has been an apparent increase in the proportion of New Zealanders visiting DOC areas since the 2010 survey, but this finding should be treated with caution because of the different approach between the surveys (i.e. methodology\(^2\), coding team, fieldwork provider).

The groups of people who were statistically significantly more likely to be a confirmed visitor to a DOC area were:

- 25-54 years
- Income $60,001 plus
- Rural
- Favourable view of DOC.

---

\(^2\) In previous years these questions were asked via a UMR telephone omnibus survey.
The groups of people who were statistically significantly more likely to **not be** a confirmed visitor to a DOC area were:

- 18-24 years, 55 years plus
- All ethnicities other than Pakeha
- Income below $40,000.

The groups of people who were statistically significantly more likely to **be** a confirmed visitor to a National Park were:

- Male
- Income $60,001 plus.

The groups of people who were statistically significantly more likely to **not be** a confirmed visitor to a National Park were:

- Female
- Maori, Pacific, Asian
- Income below $40,000.

A wide range of DOC areas were visited by New Zealanders, the most popular were: Tongariro National Park (5%) and Abel Tasman National Park (5%).

**DOC area visited most recently**

(top 10 only)

[Bar chart showing DOC areas visited]
2.4 Activities undertaken at recent visit to DOC area

The most popular activities for New Zealanders visiting DOC areas were: walks for less than 3 hours (29%), day walks (12%) and sightseeing (11%).

Main activities on recent DOC area visit (defined by respondent) visit (mentioned by 3% +)

Significantly more likely to have done activity on last visit:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walking for less than 3 hours</td>
<td>Female</td>
</tr>
<tr>
<td>Day walk (over 3 hours but not overnight)</td>
<td>Asian, other ethnicities</td>
</tr>
<tr>
<td>Sightseeing</td>
<td>55 years +, income below $60,000, unfavourable view of DOC</td>
</tr>
<tr>
<td>Family outings/recreation</td>
<td>Female, Maori</td>
</tr>
<tr>
<td>Walking/running with dog</td>
<td>Other ethnicities</td>
</tr>
<tr>
<td>Hunting</td>
<td>Male, 25-39 years, unfavourable view of DOC</td>
</tr>
</tbody>
</table>
2.5 Satisfaction with facilities at DOC area

Most New Zealanders (88%) were satisfied with the facilities at the DOC area they most recently visited. Just two percent were not satisfied. This is consistent with results from previous surveys (2008: 84% satisfied, 2009: 82% and 2010: 89%).

Those who had a favourable view of DOC were statistically significantly more likely to be satisfied than those who had an unfavourable view.

Satisfied with facilities at DOC area (defined by respondent) visited recently

[Bar chart showing satisfaction levels with DOC facilities]

Base: visited DOC area (self defined) 2,391
No significant differences
2.6 Visiting DOC area in home Conservancy

Just under half of New Zealanders (49%) had visited a DOC area in their home Conservancy in the last 12 months.

The following groups were statistically significantly more likely to have visited a DOC area in the home Conservancy in the last 12 months:

- 40-54 years
- Income $60,001 plus
- Small town
- Favourable view of DOC.

The following groups were statistically significantly more likely to have not visited a DOC area in the home Conservancy in the last 12 months:

- 55 years plus
- Income below $40,000.

Visited DOC area (defined by respondent) in home Conservancy in last 12 months

![Bar chart showing visited vs not visited](chart.png)

Base: all respondents 3614

Additional statistical testing was undertaken for this question to determine the areas where people are more likely to have visited a local DOC area. People from the following areas were statistically significantly more likely to say they had recently visited a local DOC area: Tongariro/Whanganui/Taranaki, Northland, West Coast, Otago and Nelson/Marlborough.
Just over half (56%) of New Zealanders said they were likely to visit a DOC area in their home Conservancy within the next 12 months.

The following groups were statistically significantly more likely to say they will visit a DOC area in their home Conservancy:

- Male
- 25-54 years
- Income $60,001 plus
- Favourable view of DOC
- Visited DOC area in past 12 months.

The following groups were statistically significantly more likely to say they will not visit a DOC area in their home Conservancy:

- 55 years plus
- Income below $40,000
- Small town
- Unfavourable view of DOC
- Not visited DOC area in past 12 months.

Likely to visit DOC area (defined by respondent) in home Conservancy in next 12 months

Base: all respondents 3614
2.7 Likelihood to visit a DOC area for recreation in the future

Seventy-one percent of New Zealanders said they were likely to visit a DOC area for recreation in the future. The following groups were statistically significantly more likely to say they will visit a DOC area for recreation in the future:

- 25-54 years
- Income $60,001 plus
- Favourable view of DOC.

Full significance testing follows the graph below.

**Likelihood to use DOC areas (defined by respondent) for recreation in the future**

![](image)

**Significantly more likely to say they will visit a DOC area for recreation in the future:**

<table>
<thead>
<tr>
<th>Category</th>
<th>Likely Groups</th>
</tr>
</thead>
<tbody>
<tr>
<td>Once a month or more often</td>
<td>40-54 years, Pacific, income $60,001 +, small town, favourable view of DOC</td>
</tr>
<tr>
<td>Between once a month and once every six months</td>
<td>25-54 years, income $60,001 +, favourable view of DOC</td>
</tr>
<tr>
<td>Between once every six months and once a year</td>
<td>55 years +</td>
</tr>
<tr>
<td>Less often than once a year</td>
<td>55 years +, income below $40,000</td>
</tr>
<tr>
<td>Total more often than once a year</td>
<td>25-54 years, income $60,001+, favourable view of DOC</td>
</tr>
</tbody>
</table>
2.8 DOC facilities used in the last three years

Just over half (51%) of New Zealanders had visited a DOC Visitors Centre within the last three years. Twenty-one percent had stayed at a basic DOC campsite. Less than 20 percent had: stayed at a standard DOC campsite (17%), walked a NZ Great Walk (15%), stayed at a DOC hut/lodge/house (13%) and/or stayed at a serviced DOC campsite (10%).

DOC facilities used in the last three years

The following groups were statistically significantly more likely to have used each of the facilities:

<table>
<thead>
<tr>
<th>Great Walk</th>
<th>Basic campsite</th>
<th>Standard campsite</th>
<th>Serviced campsite</th>
<th>Hut/lodge/house</th>
<th>Visitor’s Centre</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24 years</td>
<td>Male 18-24 years</td>
<td>18-24 years</td>
<td>18-24 years</td>
<td>18-24 years</td>
<td>40-54 years</td>
</tr>
<tr>
<td>Favourable view of DOC</td>
<td>25-39 years</td>
<td>Pacific</td>
<td>Income $60,001 +</td>
<td>40-54 years</td>
<td>Income $60,001 +</td>
</tr>
<tr>
<td></td>
<td>Maori</td>
<td>Favourable view of DOC</td>
<td>Favourable view of DOC</td>
<td>Favourable view of DOC</td>
<td>Favourable view of DOC</td>
</tr>
<tr>
<td></td>
<td>Pacific</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Income $60,001 +</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Small town</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Favourable view of DOC</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Satisfaction is high for all facilities, ranging from 80 percent satisfaction for basic DOC campsites to 94 percent for NZ Great Walks.

Satisfaction with DOC facilities
(combined satisfied and very satisfied)

Base: Great Walk 610, Basic camp 828, Standard camp 644, Serviced camp 387, hut 544, Visitor’s Centre 1929
2.9 Likelihood to use DOC facilities in the next three years

Sixty percent of New Zealanders said they are likely to visit a DOC Visitor Centre within the next three years. Around a third said they were likely to use a NZ Great Walk (35%), serviced DOC campsite (33%), basic DOC campsite (30%), DOC hut/lodge/house (30%) and/or a standard DOC campsite (28%).

The following groups were statistically significantly more likely to say they would be likely to use each of the facilities:

<table>
<thead>
<tr>
<th>Great Walk</th>
<th>Basic campsite</th>
<th>Standard campsite</th>
<th>Serviced campsite</th>
<th>Hut/lodge/ house</th>
<th>Visitor’s Centre</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24 years</td>
<td>Male</td>
<td>18-54 years</td>
<td>18-54 years</td>
<td>40-54 years</td>
<td>40-54 years</td>
</tr>
<tr>
<td>Income $60,001 +</td>
<td>18-54 years</td>
<td>Maori</td>
<td>Other ethnicities</td>
<td>Maori</td>
<td>Income $60,001 +</td>
</tr>
<tr>
<td>Favourable view of DOC</td>
<td>Maori</td>
<td>Income $60,001 +</td>
<td>Income $60,001 +</td>
<td>Income $60,001 +</td>
<td>Favourable view of DOC</td>
</tr>
<tr>
<td>Visited DOC area in last 12 months</td>
<td>Pacific</td>
<td>Favourable view of DOC</td>
<td>Favourable view of DOC</td>
<td>Favourable view of DOC</td>
<td>Visited DOC area in last 12 months</td>
</tr>
<tr>
<td>Income $60,001 +</td>
<td>Visited DOC area in last 12 months</td>
<td>Visited DOC area in last 12 months</td>
<td>Visited DOC area in last 12 months</td>
<td></td>
<td>Favourable view of DOC</td>
</tr>
</tbody>
</table>
The key reasons for being **keen to use** each of the facilities were as follows:

<table>
<thead>
<tr>
<th>Great Walk</th>
<th>Basic campsite</th>
<th>Standard campsite</th>
<th>Serviced campsite</th>
<th>Hut/lodge/house</th>
<th>Visitor’s Centre</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scenery</td>
<td>Rest/take a break</td>
<td>Rest/take a break</td>
<td>Rest/take a break</td>
<td>Rest/take a break</td>
<td>Information/ advice</td>
</tr>
<tr>
<td>On list of things I want to do</td>
<td>Good value for money</td>
<td>Good value for money</td>
<td>Convenience/ comfort</td>
<td>Scenery</td>
<td>Up to date information</td>
</tr>
<tr>
<td>Physical challenge</td>
<td>Scenery</td>
<td>Scenery</td>
<td>Family time</td>
<td>Family time</td>
<td>Family time</td>
</tr>
<tr>
<td>Rest/take a break</td>
<td>Family time</td>
<td>Family time</td>
<td>Good value for money</td>
<td>Good value for money</td>
<td>Scenery</td>
</tr>
<tr>
<td>Family time</td>
<td>Physical challenge</td>
<td>Convenience/ comfort</td>
<td>Scenery</td>
<td>On list of things I want to do</td>
<td>Rest/take a break</td>
</tr>
<tr>
<td>Good value for money</td>
<td>On list of things I want to do</td>
<td>Physical challenge</td>
<td>On list of things I want to do</td>
<td>Physical challenge</td>
<td>Good value for money</td>
</tr>
<tr>
<td>Good experience</td>
<td>Self sufficient/ back to basics</td>
<td>On list of things I want to do</td>
<td>Physical challenge</td>
<td>Convenience/ comfort</td>
<td>On list of things I want to do</td>
</tr>
<tr>
<td>Wildlife/nature</td>
<td>Like camping/ simplicity</td>
<td>Self sufficient/ back to basics</td>
<td></td>
<td></td>
<td>Education/ conservation</td>
</tr>
<tr>
<td>Tramping</td>
<td>Wildlife/nature</td>
<td></td>
<td></td>
<td></td>
<td>Show/teach kids</td>
</tr>
</tbody>
</table>

The key reasons for **not being keen** to use each of the facilities were as follows:

<table>
<thead>
<tr>
<th>Great Walk</th>
<th>Basic campsite</th>
<th>Standard campsite</th>
<th>Serviced campsite</th>
<th>Hut/lodge/house</th>
<th>Visitor’s Centre</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age/mobility</td>
<td>Age/mobility</td>
<td>Would rather go somewhere else</td>
<td>Would rather go somewhere else</td>
<td>Age/mobility</td>
<td>Not interested</td>
</tr>
<tr>
<td>Not fit/lazy</td>
<td>Not interested</td>
<td>Not interested</td>
<td>Not interested</td>
<td>Not interested</td>
<td>Age/mobility</td>
</tr>
<tr>
<td>Children too young</td>
<td>Would rather go somewhere else</td>
<td>Age/mobility</td>
<td>Age/mobility</td>
<td>Would rather go somewhere else</td>
<td>Don’t know where they are</td>
</tr>
<tr>
<td>Not interested</td>
<td>Not into camping</td>
<td>Children too young</td>
<td>Children too young</td>
<td>Children too young</td>
<td>Would rather go somewhere else</td>
</tr>
<tr>
<td>Too busy</td>
<td>Children too young</td>
<td>Prefer more facilities</td>
<td>Prefer more facilities</td>
<td>Not fit/lazy</td>
<td>No need</td>
</tr>
<tr>
<td>Would rather go somewhere else</td>
<td>Not fit/lazy</td>
<td>Prefer home comforts</td>
<td>Prefer home comforts</td>
<td>Too busy</td>
<td>Too busy</td>
</tr>
<tr>
<td>Cost</td>
<td>Too busy</td>
<td>Not fit/lazy</td>
<td>Not fit/lazy</td>
<td>Prefer home comforts</td>
<td></td>
</tr>
</tbody>
</table>
2.10 Price of facilities

Of those who were aware of the price of using DOC facilities, nearly all thought the facilities were provided at a reasonable price.

Service provided at a reasonable price

<table>
<thead>
<tr>
<th>Facility</th>
<th>Yes</th>
<th>No</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>NZ Great Walk</td>
<td>65%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Basic DOC campsite</td>
<td>43%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Standard DOC campsite</td>
<td>55%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Serviced DOC campsite</td>
<td>60%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>DOC Hut/Lodge/Bush</td>
<td>66%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>DOC Visitor Centre</td>
<td>66%</td>
<td>3%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Base: all respondents 3614
2.11 Information about facilities

Most New Zealanders (three quarters or more) thought it would be easy to find out information about DOC facilities if they wanted to know more.

The groups of people who were statistically significantly more likely to think it would be easy to find out information about the facilities were as follows:

- Great Walk – Pakeha, income $60,001 plus, favourable view of DOC, visited DOC area in last 12 months
- DOC Campsites – income $60,001 plus, favourable view of DOC, visited DOC area in last 12 months
- Hut/lodge/house - 40-54 years, income $60,001 plus, favourable view of DOC, visited DOC area in last 12 months
- Visitors Centre - Pakeha, income $60,001 plus, favourable view of DOC, visited DOC area in last 12 months.

Would it be easy to find information about

Base: all respondents 3614
2.12  DOC Gateways

Respondents were asked if they were likely to visit a DOC Gateway within the next 12 months (Gateways were described as ‘a DOC place that is family friendly where you can do a range of activities’). Just under a third (31%) said they were likely to visit a DOC Gateway. Just over a third said they were unlikely to visit a DOC Gateway (39%) and the remainder (30%) said they did not know.

The following groups were statistically significantly more likely to say they will visit a DOC Gateway:

- 25-54 years
- Maori
- Pacific
- Income $60,001 +
- Favourable view of DOC
- Visited DOC area in last 12 months.

The following groups were statistically significantly more likely to say they will not visit a DOC Gateway:

- 55 years +
- Income below $40,000
- Unfavourable view of DOC
- Not visited DOC area in last 12 months.
3.0 Conclusions

Awareness of DOC’s role as a provider of recreation service was high, most New Zealanders (95%) could name at least one recreation service provided by DOC. DOC was most well known as a provider of walking tracks, huts and camping areas. There were some groups which stood out as being less aware of DOC’s recreation services, in particular young adults, Pacific and Asian people.

Use of DOC recreation areas was high, with half of New Zealanders having visited a DOC area in the previous 12 months.

Predicted use was also high, with 71 percent of New Zealanders saying they were likely to visit a DOC area for recreation in the future.

There were some groups which stood out as more likely to have visited DOC areas and more likely to visit them in the future – these were people in the middle adult years (25-54) and in the highest two-thirds of household income groups ($60,000 +). People in these groups would be the easiest to encourage to visit DOC areas.

Visitors Centres were the most accessed of the core DOC facilities – just over half of New Zealanders had visited a Centre in the previous three years. Use of other core DOC facilities appeared to be limited to a minority of New Zealanders – less than a quarter had used a Great Walk, DOC campsites and/or huts/lodge/houses.
Sixty percent of New Zealanders said they were likely to use Visitors Centres (in the next three years). Likely use of the other facilities was limited to around a third of New Zealanders (NZ Great Walk 35%, Basic DOC Campsite 30%, Standard DOC Campsite 28%, Serviced DOC Campsite 33%, DOC hut/lodge/house 30% and DOC Gateway 31%).

Barriers to using the facilities did not appear to be driven by price or access to information – most considered the prices reasonable and the information easy to access. Poor experience also did not appear to be a barrier to use – there were very high levels of satisfaction with the services people had used.

Significance testing gave insight into the demographic profile of those who were more likely to say they had used and/or would use each of the core DOC facilities. People in these groups would be the easiest to encourage to use each of the facilities:

- Great Walks – 18-24 years and with a household income above $60,000
- Basic Campsites – male, 18-54 years, Maori, Pacific and household income above $60,000
- Standard Campsites – 18-54 years, Maori and household income above $60,000
- Serviced campsite – 18-54 years, ethnicities other than Pakeha and household income above $60,000
- Hut/lodge/house –40-54 years, Maori and household income above $60,000
- DOC Gateways – 25-54 years, Maori, Pacific and household income above $60,000.
The research gave insight into the factors that motivated New Zealanders to use each of the DOC facilities, market positioning of the facilities as offering each of these benefits is likely to encourage use:

- Great Walks – scenery, achieving a goal and a physical challenge
- Basic and Standard Campsites – escaping for rest/break, good value for money, scenery
- Serviced Campsite – escaping for a rest/break, convenience/comfort and family time
- Hut/lodge/house – escaping for a rest/break, scenery and family time
- Visitors Centre – good quality information, family time and scenery.

The research also gave insight into the factors that were barriers to use of DOC facilities. The barriers were primarily: age/mobility, preference for visiting other places, lack of fitness and young age of children. The barriers are significant and would require considerable investment to address (e.g. making facilities easier to access for people with low mobility and/or young children).

There was a clear relationship between New Zealander’s view of DOC and their propensity to visit DOC areas – those with a favourable view of DOC were more likely to visit DOC areas. Likewise, there was a clear relationship between New Zealander’s views of conservation and their propensity to visit DOC areas – those with a favourable view of conservation were more likely to have visited DOC areas. (See DOC NS Report 4 Conservation for more details). This research does not explore the direction of the causality between the factors (i.e. which of the factors is the driver) but does show an inter-relationship which could be better understood with research focused on understanding the causality.
4.0 Methodology

The Department of Conservation (DOC) undertook a survey of adult New Zealanders (The National Survey) in June 2011. The National Survey replaced a range of independent general public surveys undertaken by DOC. The intention of the National Survey was to consolidate surveying of the general public for increased efficiency and improved methodological rigour. The launch of the National Survey also provided an opportunity for DOC to survey the general public on topical issues and areas of strategic focus, including the Destination Management Framework, for DOC.

The National Survey was a survey of the adult population (18 years plus) of New Zealand. A total of 3,614 people were interviewed for the survey. The primary methodology was telephone (sample of 2,224) and the secondary methodology was online (sample of 1,390). The telephone sample was sourced via a random sample of people listed on the Electoral Roll. The online sample was sourced from the Colmar Brunton online panel.

The survey sample was stratified and then post weighted to match the actual population distribution (2006 Census) by:

1) Ethnicity (at a Conservancy level)
2) Interlocking age and gender\(^3\) (at a Conservancy level).

The sample included a minimum of 270 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 (2006 Census). The sample profile follows overleaf.

Results shown in this report as statistically significant are significantly higher at the 95 percent confidence interval or higher and where the total is n=30 or greater. The following factors are reported on for statistical significance:

- Gender
- Age
- Ethnicity
- Household income
- Living area (e.g. big city/rural)
- View of DOC (excluded when inter-related)
- Visited DOC area (defined by respondent) in last 12 months (excluded when inter-related).

This report focuses on the question respondents were asked about recreation in DOC areas.

---

\(^3\) 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.
### Sample Profile
(unweighted numbers and weighted %)

<table>
<thead>
<tr>
<th>Gender</th>
<th>n=</th>
<th>%</th>
<th>Area</th>
<th>n=</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>1,678</td>
<td>48%</td>
<td>Northland</td>
<td>317</td>
<td>4%</td>
</tr>
<tr>
<td>Female</td>
<td>1,936</td>
<td>52%</td>
<td>Auckland</td>
<td>332</td>
<td>32%</td>
</tr>
<tr>
<td><strong>Age</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>24 years or younger</td>
<td>405</td>
<td>12%</td>
<td>Bay of Plenty</td>
<td>337</td>
<td>7%</td>
</tr>
<tr>
<td>25-39 years</td>
<td>937</td>
<td>28%</td>
<td>Tongariro/Whanganui/Taranaki</td>
<td>323</td>
<td>8%</td>
</tr>
<tr>
<td>40-54 years</td>
<td>1,012</td>
<td>28%</td>
<td>Wellington/Hawke’s Bay</td>
<td>351</td>
<td>16%</td>
</tr>
<tr>
<td>55 years plus</td>
<td>1,247</td>
<td>31%</td>
<td>Nelson/Marlborough</td>
<td>344</td>
<td>3%</td>
</tr>
<tr>
<td>Refused</td>
<td>13</td>
<td>1%</td>
<td>West Coast</td>
<td>270</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Ethnicity</strong> (multiple response possible)</td>
<td></td>
<td></td>
<td>Canterbury</td>
<td>341</td>
<td>13%</td>
</tr>
<tr>
<td>Pakeha</td>
<td>3,278</td>
<td>88%</td>
<td>Otago</td>
<td>347</td>
<td>5%</td>
</tr>
<tr>
<td>Maori</td>
<td>438</td>
<td>11%</td>
<td>Southland</td>
<td>325</td>
<td>2%</td>
</tr>
<tr>
<td>Pacific</td>
<td>79</td>
<td>3%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Household income before tax</strong></td>
<td></td>
<td></td>
<td>$40,000 or less</td>
<td>844</td>
<td>20%</td>
</tr>
<tr>
<td>Asian</td>
<td>107</td>
<td>4%</td>
<td>$40,001-$60,001</td>
<td>637</td>
<td>16%</td>
</tr>
<tr>
<td>Other</td>
<td>131</td>
<td>5%</td>
<td>$60,001 or more</td>
<td>1,671</td>
<td>51%</td>
</tr>
<tr>
<td>Refused</td>
<td>-</td>
<td>1%</td>
<td>Refused/DK</td>
<td>462</td>
<td>12%</td>
</tr>
<tr>
<td><strong>Location</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Big city</td>
<td>951</td>
<td>47%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Small city/large town</td>
<td>1,322</td>
<td>27%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Small town</td>
<td>905</td>
<td>16%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rural</td>
<td>425</td>
<td>9%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>