



# **Department of Conservation National Survey**

## **Visitor and Historic Report**

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June 2012

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## 1.0 Summary

In 2012, 77 percent of New Zealanders were aware that DOC provides recreation services. There was a small, but statistically significant increase in New Zealanders who said they were **not** aware DOC provides recreation services between 2011 (20%) and 2012 (22%).

The DOC services New Zealanders were most aware of were: tramping/tracks/hiking (61%), huts/cabins (33%) and camping areas (25%). Four percent were not aware of any specific services provided by DOC.

Fifty-six percent of New Zealanders had visited a DOC area in the last 12 months. This is a statistically significant increase on the 2011 result of 51 percent. A further 11 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-six percent of respondents were confirmed as having visited a National Park in the last 12 months.

A wide range of DOC areas were visited by New Zealanders, the most popular were: Tongariro National Park (11%), Karangahake Gorge (6%), North Head Auckland (6%), Arthur's Pass National Park (5%), Coromandel Forest Park (5%), Rangitoto Island (5%), Hamner Forest Park (5%) and Fiordland National Park (5%).

The most popular activities for New Zealanders visiting DOC areas were: walks for less than 3 hours (35%), day walks (10%) and sightseeing (10%). There were statistically significant differences between 2011 and 2012 for walking less than 3 hours (up from 29% to 35%) and day walks (down from 12% to 10%).

Most New Zealanders (87%) were satisfied with the facilities at the DOC area they most recently visited. This is consistent with results from previous surveys (2008: 84% satisfied, 2009: 82%, 2010: 89%, 2011 88%). Just three percent were not satisfied. This is a small but significant increase on the result for 2011 (2%).

Sixty-three percent of New Zealanders were aware that DOC provides historic sites. Twenty-nine percent of New Zealanders had visited a DOC historic site in the last 12 months. A wide range of DOC historic sites were visited by New Zealanders, the most popular were: Otago Central Rail Trail (24% of those who had visited a historic site) and Cape Reinga (23% of those who had visited a historic site). Most visitors to DOC historic sites were satisfied with their heritage experience at the DOC historic site they had visited most recently (87%).

In 2012, 44 percent of New Zealanders had visited a DOC area in their home Conservancy in the last 12 months. This result shows a statistically significant decrease between 2011 and 2012 (49% - 44%). There was a corresponding statistically significant increase in the proportion who said they had not visited a DOC area in their home Conservancy in the last 12 months between 2011 and 2012 (39% - 44%).

Just over half (54%) of New Zealanders said they were likely to visit a DOC area in their home Conservancy within the next 12 months. There has been no statistically significant change between 2011 and 2012 for this measure.

Eleven percent of New Zealanders say they visit a DOC area for recreation at least once a month, a further 29 percent at least once every six months and 29 percent at least once a year. A total of 70 percent of New Zealanders say they use a DOC area for recreation at least once a year.

Seventy-five percent of New Zealanders said they were likely to visit a DOC area for recreation in the future. This is a statistically significant increase on the 2011 result of 71 percent.

Nearly half (49%) of New Zealanders had visited a DOC Visitor Centre within the last three years. Twenty percent had stayed at a basic DOC campsite. Less than 20 percent had: stayed at a standard DOC campsite (16%), walked a NZ Great Walk (14%), stayed at a DOC hut/lodge/house (13%), stayed at a serviced DOC campsite (9%) and/or been whitebaiting (8%). There were no statistically significant differences in these results between 2011 and 2012.

Satisfaction is high for all facilities, ranging from 80 percent satisfaction for standard DOC campsites to 91 percent for NZ Great Walks. There has been a statistically significant decrease between 2011 and 2012 for satisfaction with NZ Great Walks (94% - 91%) and DOC Visitor Centres (89% - 86%).

Fifty-eight 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 (37%), serviced DOC campsite (33%), basic DOC campsite (32%), DOC hut/lodge/house (31%) and/or a standard DOC campsite (31%). There was a statistically significant increase between 2011 and 2012 in those who said they were likely to use a standard DOC campsite within the next three years (28% - 31%).

Of those who were aware of the price of using DOC facilities, nearly all thought the facilities were provided at a reasonable price. There have been no statistically significant changes between 2011 and 2012.

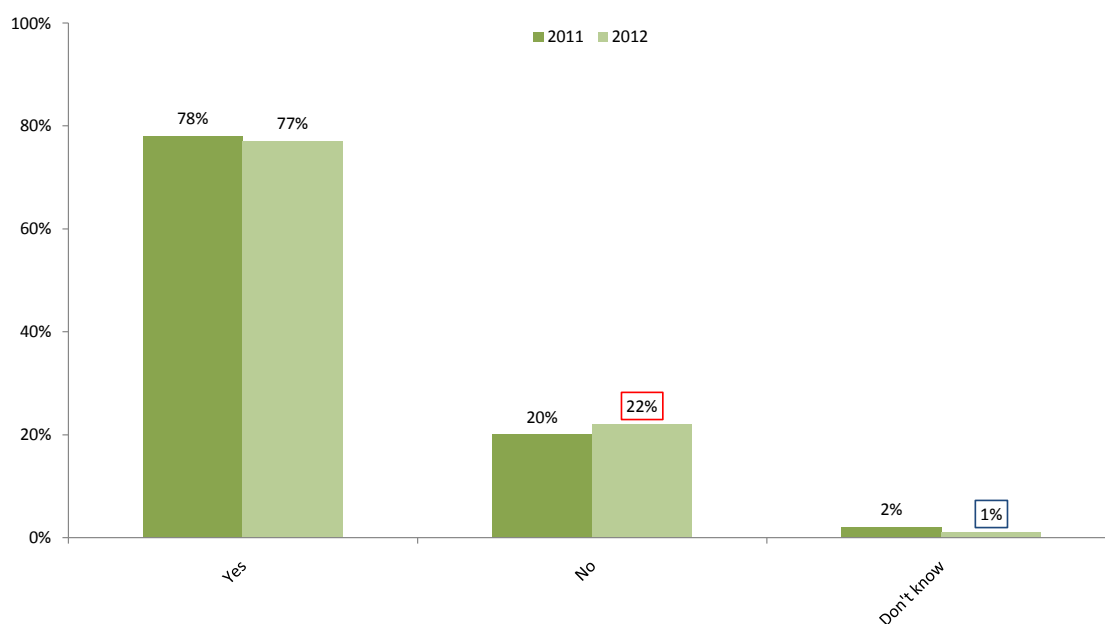
Most New Zealanders (three quarters or more) thought it would be easy to find out information about DOC facilities if they wanted to know more. This was not statistically significantly different than the 2011 result.

## 2.0 Findings

### 2.1 Awareness of DOC recreation services

In 2012, 77 percent of New Zealanders were aware that DOC provides recreation services. There was a small, but statistically significant increase in New Zealanders who said they were **not** aware DOC provides recreation services between 2011 (20%) and 2012 (22%).

#### Aware that DOC provides recreation services



Base: all respondents 2011 3614, 2012 3885

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

- 40 years plus
- Pakeha
- Income \$60,001 plus
- Visited DOC area in last 12 months
- Otago
- Southland.

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
- Small city/large town

- Not visited DOC area in last 12 months.

There was a statistically significant increase between 2011 and 2012 in the awareness of DOC providing recreation services for Otago (77% - 84%) and Southland (77% - 84%).

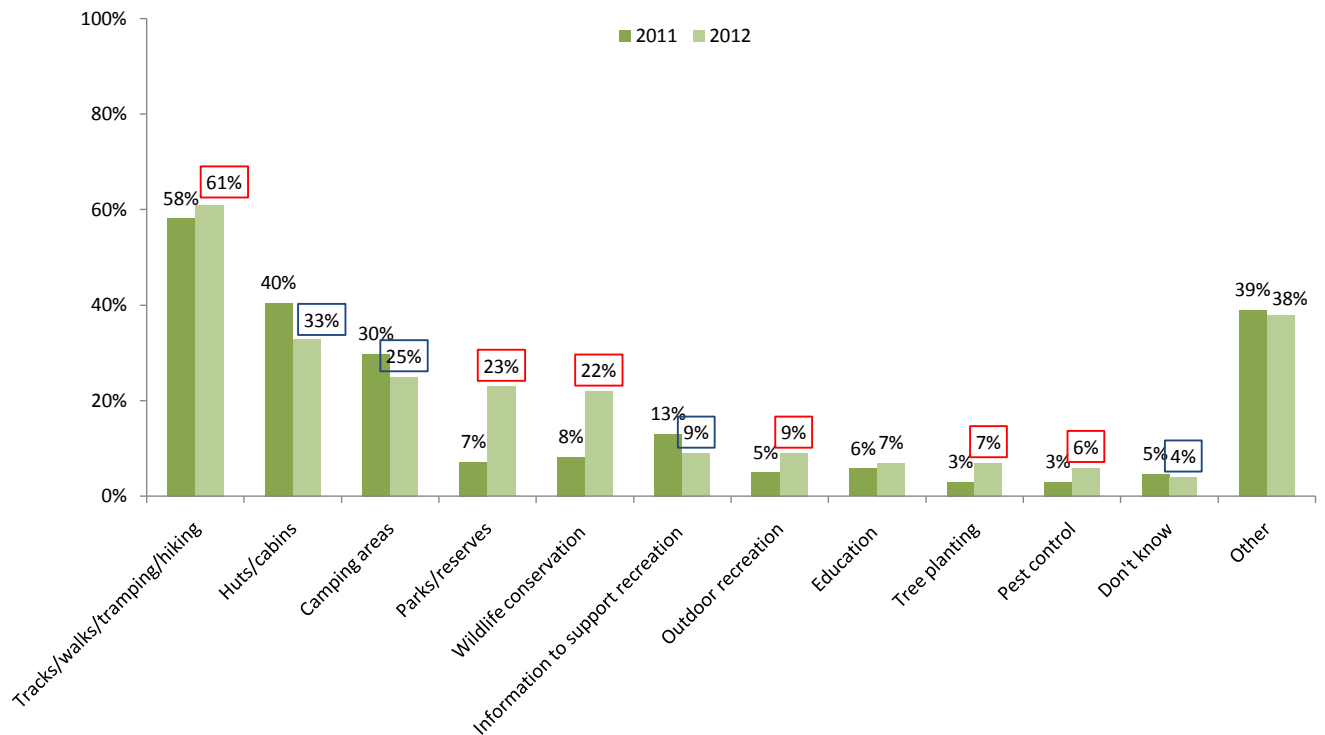
<b>Significantly more likely to be aware DOC provides recreation services:</b>		
	<b>2011</b>	<b>2012</b>
<b>Total</b>	<b>78%</b>	<b>77%</b>
Auckland	73%	73%
Bay of Plenty	76%	73%
Canterbury	82%	82%
Nelson/ Marlborough	79%	81%
Northland	76%	80%
Otago	77%	<b>84%</b>
Southland	77%	<b>84%</b>
Tongariro, Whanganui, Taranaki	80%	79%
Waikato	79%	74%
Wellington	82%	80%
West Coast	83%	80%
<b>Base Size</b>	<b>3,614</b>	<b>3,885</b>

## 2.2 DOC services

The DOC services New Zealanders were most aware of were: tramping/tracks/hiking (61%), huts/cabins (33%) and camping areas (25%). Some respondents mentioned services provide by DOC that are not recreation services (e.g. tree planting and pest control). Four percent said they were not aware of any specific recreation services provided by DOC.

Significant differences follow in the table overleaf.

### DOC recreation services aware of (mentioned by 5% +)



Base: aware of DOC services 2011 2803, 2012 2487

<b>Significantly more likely to mention (does not include non recreation services):</b>	
Tracks/walks/tramping/hiking	40-54 years, income \$60,001 plus, rural, Otago, West Coast
Huts/cabins	Male, 40-54 years, income \$60,001 plus, unfavourable view of DOC, visited DOC area in the last 12 months, Nelson/Marlborough, Wellington, West Coast
Camping areas	Favourable view of DOC, Nelson/Marlborough, Northland
Parks/reserves	40-54 years, income \$60,001 plus.
Information to support recreation	Otago, West Coast
Outdoor recreation	Otago
Don't know	18-24 years, Pacific, unfavourable view of DOC, not visited a DOC area in the last 12 months
None	25-39 years



## 2.3 Visited DOC areas

Fifty-six percent of New Zealanders had visited a DOC area in the last 12 months. This is a statistically significant increase on the 2011 result of 51 percent.

A further 11 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-six 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<sup>1</sup>, coding team, fieldwork provider).

### Visited areas managed by DOC in last 12 months



Base: all respondents 2011 3614, 2012 3885

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

- Male
- 25-54 years
- Income \$60,001 plus
- Small town
- Favourable view of DOC.

<sup>1</sup> In 2010 and years previous to this, 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:

- Female
- 18-24 years
- 55 years plus
- Maori
- Pacific
- Asian
- Income below \$60,000
- Big city.

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

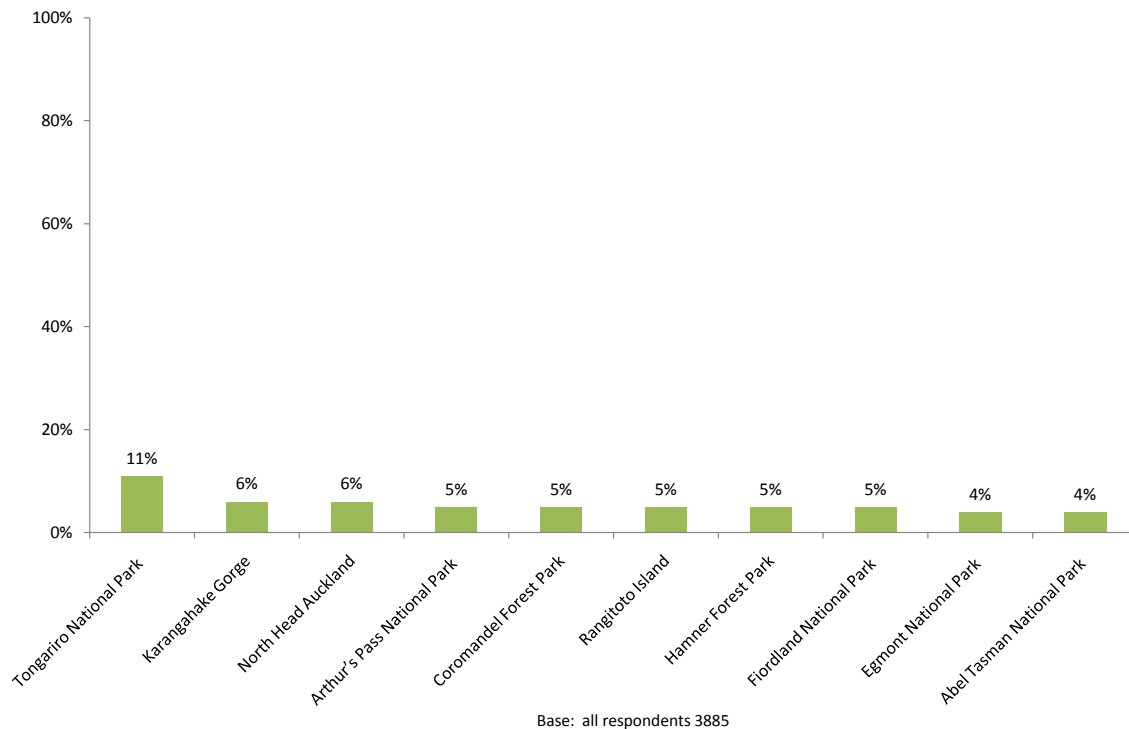
- Male
- 40-54 years
- Income \$60,001 plus
- Small town.

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
- Big city.

A wide range of DOC areas were visited by New Zealanders, the most popular were: Tongariro National Park (11%), Karangahake Gorge (6%), North Head Auckland (6%), Arthur's Pass National Park (5%), Coromandel Forest Park (5%), Rangitoto Island (5%), Hamner Forest Park and Fiordland National Park (5%), Egmont National Park (4%), and Abel Tasman National Park (4%).

### DOC Area visited in last 12 months (top 10 only)



Tongariro National Park remains the most visited DOC area. Most of the destinations that were part of the 2011 top 10 (7 out of 10) are also part of the top 10 list in 2012.

<b>DOC Area visited most recently (top 10 only)</b>			
<b>2011</b>		<b>2012</b>	
Tongariro National Park	5%	Tongariro National Park	11%
Abel Tasman National Park	5%	Karangahake Gorge	6%
Coromandel Forest Park	3%	North Head Auckland	6%
Fiordland National Park	2%	Arthur's Pass National Park	5%
Egmont National Park	2%	Coromandel Forest Park	5%
Arthur's Pass National Park	2%	Rangitoto Island	5%
Rangitoto Island	2%	Hamner Forest Park	5%
Waipoua - Tane Mahuta Big Trees	2%	Fiordland National Park	5%
Kaimai Mamaku Forest Park	2%	Egmont National Park	4%
Tiritiri Matangi Island	1%	Abel Tasman National Park	4%

There was also a lot of difference in the top 10 DOC areas visited by Conservancy, largely reflecting a tendency to use areas closer to home more often.

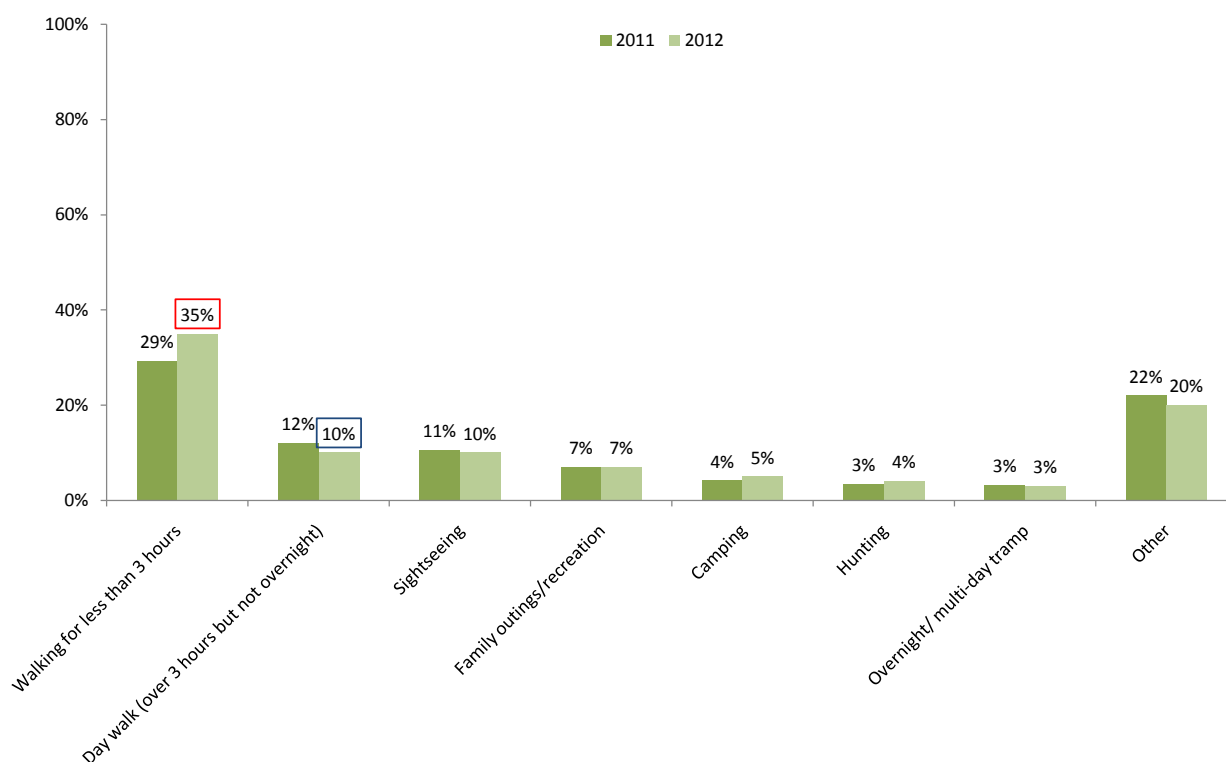
<b>Top 10 DOC Areas visited, by Conservancy, Table 1</b>					
<b>Auckland</b>	<b>Bay of Plenty</b>	<b>Canterbury</b>	<b>Nelson/ Marlborough</b>	<b>Northland</b>	<b>Otago</b>
North Head Auckland	Tongariro National Park	Arthur's Pass National Park	Abel Tasman National Park	Kerikeri basin – stone store	Moeraki Boulders
Tongariro National Park	Karangahake Gorge	Hamner Forest Park	Nelson Lakes National Park	Waipoua – Tane Mahuta Big Tree	Catlins Forest Park
Rangitoto Island	Te Urewera National Park	Aoraki/Mt Cook National Park	Kahurangi National Park	Cape Reinga	Otago Central Rail Trail
Karangahake Gorge	Kaimai Mamaku Forest Park	Godley Head – Christchurch	Ship Cove, Marlborough Sounds	Northland Forest Park	Mt Aspiring National Park
Tiritiri Matangi Island	Karangahake Gorge	Moeraki Boulders	Mt Richmond Forest Park	Bream Head	Fiordland National Park
Leigh Marine Reserve	Coromandel Forest Park	Lake Sumner Forest Park	Hamner Forest Park	Flagstaff Hill	Arrowtown Chinese Settlement
Cape Reinga	Karangahake Historic Gold Mine	Abel Tasman National Park	Te Waikoropupu Springs	Urupukapuka Island	St Bathans
Coromandel Forest Park	Kaimanawa Forest Park	Westland/Tai Poutini National	Queen Charlotte Walkway	Rangikapiti Pa	Aoraki/Mt Cook National Park
Kerikeri basin – stone store	Tongariro National Trout Centre	Arrowtown Chinese Settlement	Arthur's Pass National Park	Tongariro National Park	Coronet Peak Ski field
Cathedral Cove Ha Hei Marine	Cathedral Cove Ha Hei Marine	Craigieburn Forest Park	Cape Foulwind – Westport	Poor Knights Marine reserve	Taiaroa Head albatross colony

<b>Top 10 DOC Areas visited, by Conservancy, Table 2</b>				
<b>Southland</b>	<b>Tongariro/ Whanganui / Taranaki</b>	<b>Waikato</b>	<b>Wellington</b>	<b>West Coast</b>
Fiordland National Park	Egmont National Park	Tongariro National Park	Rimutaka Forest Park	Arthur's Pass National Park
Catlins Forest Park	Tongariro National Park	Karangahake Gorge	Tararua Forest Park	Paparoa National Park
Arrowtown Chinese Settlement	Whanganui National Park	Coromandel Forest Park	Tongariro National Park	Westland/Tai Poutini
Moeraki Boulders	Dawson Falls Power Station	Karangahake Gorge	Government Buildings Wellington	Cape Foulwind – Westport
Rakiura National Park	North Egmont Camphouse	Pirongia Forest Park	Ruahine Forest Park	Denniston historic mine
Otago Central Rail Trail	Tongariro River walks	Kaimai Mamaku Forest Park	Manawatu Gorge Walkway	Kahurangi National Park
Coronet Peak Ski field	Coromandel Forest Park	Cathedral Cove Ha Hei Marine	Pukaha Mount Bruce Wildlife	Hamner Forest Park
Mt Aspiring National Park	Kaimanawa Forest Park	Karangahake Historic Gold Mine	Te Urewera National Park	Nelson Lakes National Park
Westland/Tai Poutini National	Tongariro National Trout Centre	Pureora Forest Park	Kapiti Island Nature Reserve	Abel Tasman National Park
St Bathans	Bridge to Nowhere	Tongariro River walks	Kaweka Forest Park	Fiordland National Park

## 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 (35%), day walks (10%) and sightseeing (10%). There were statistically significant differences between 2011 and 2012 for walking less than 3 hours (up from 29% to 35%) and day walks (down from 12% to 10%).

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



Significantly more likely to have done activity on last visit:	
Walking for less than 3 hours	Female
Day walk (over 3 hours but not overnight)	-
Sightseeing	55 years plus, income below \$40,000
Family outings/recreation	25-39 years
Camping	-
Hunting	Male, rural, unfavourable view of DOC
Overnight/multi-day tramp	18-24 years

Significantly more likely to have done activity on last visit, by Conservancy												
	Total	Auckland	Bay of Plenty	Canterbury	Nelson/Mariboro	Northland	Otago	Southland	Tongariro Whanganui Taranaki	Waikato	Wellington	West Coast
Walking for less than 3 hours	<b>35%</b>	37%	35%	32%	33%	35%	25%	25%	35%	40%	34%	28%
Day walk (over 3 hours but not overnight)	<b>10%</b>	10%	8%	8%	10%	8%	12%	11%	13%	9%	14%	11%
Sightseeing	<b>10%</b>	10%	7%	8%	8%	10%	16%	13%	9%	8%	9%	14%
Family outings/recreation	<b>7%</b>	9%	5%	7%	9%	9%	6%	6%	7%	5%	7%	8%
Camping	<b>5%</b>	6%	8%	7%	3%	8%	3%	4%	1%	6%	2%	4%
Hunting	<b>4%</b>	2%	6%	3%	4%	1%	6%	10%	5%	5%	4%	5%
Overnight/multi-day tramp	<b>3%</b>	3%	2%	3%	4%	2%	5%	4%	3%	2%	5%	3%

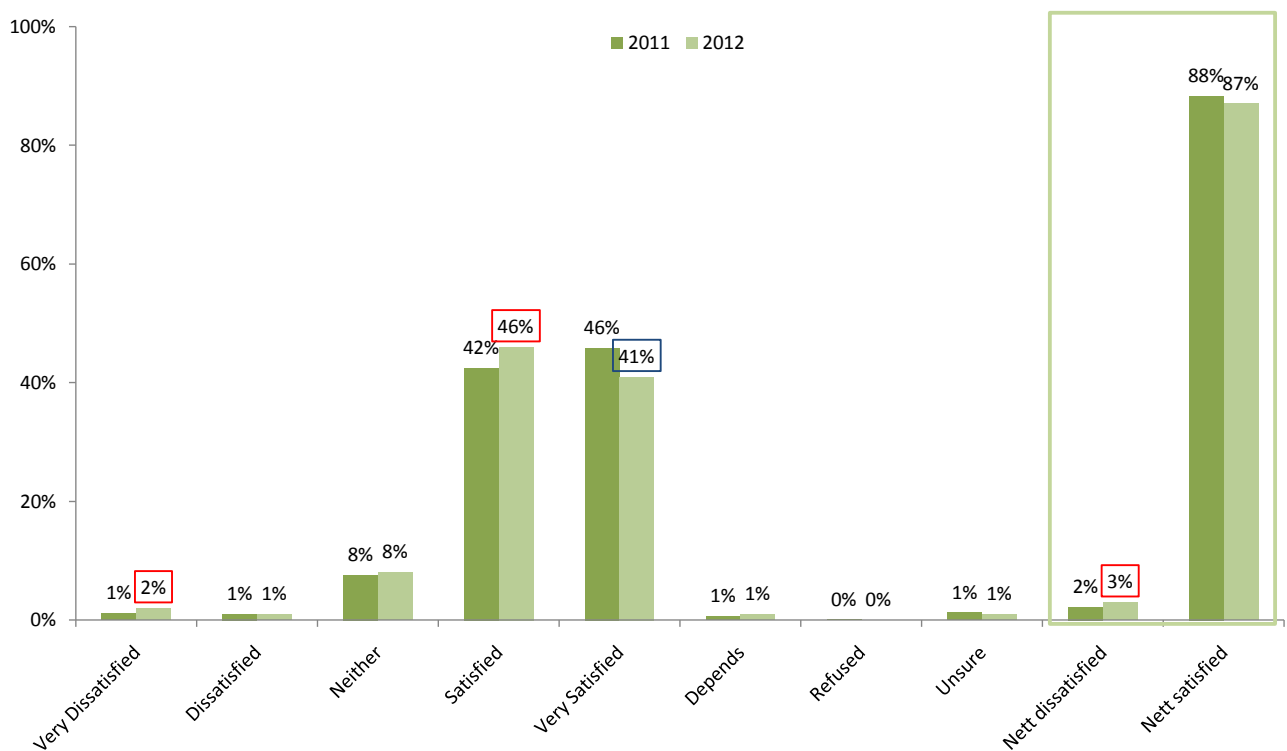


## 2.5 Satisfaction with facilities at DOC area

Most New Zealanders (87%) were satisfied with the facilities at the DOC area they most recently visited. This is consistent with results from previous surveys (2008: 84% satisfied, 2009: 82%, 2010: 89%, 2011 88%). Just three percent were not satisfied. This is a small but significant difference on the result for 2011 (2%).

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

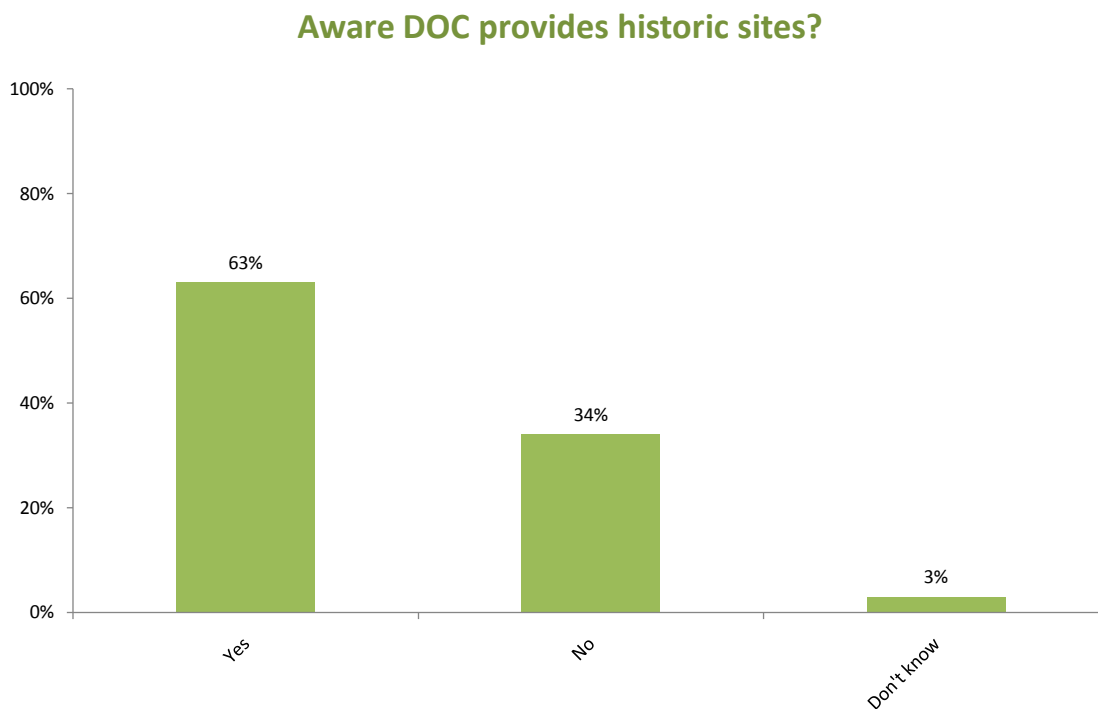
### Satisfied with facilities at DOC area (defined by respondent) visited recently



Base: visited DOC area (self defined) 2011 2,391, 2012 2,675

## 2.6 Awareness of DOC historic sites

Sixty-three percent of New Zealanders were aware that DOC provides historic sites.



Base: all respondents 3,885

People who were significantly more likely to say they were **aware** DOC provides historic sites were:

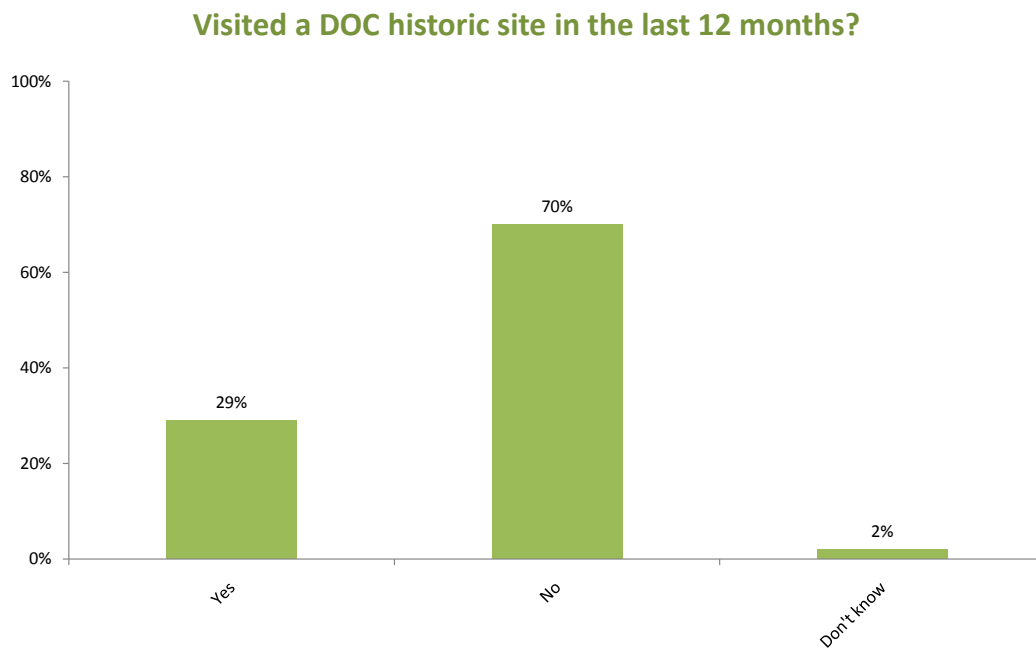
- Male
- 55 years plus
- Pakeha
- Rural
- Visited DOC area in last 12 months
- Northland
- West Coast.

People who were significantly more likely to say they were **not aware** DOC provides historic sites were:

- 18-39 years
- Asian
- Not visited DOC area in last 12 months
- Auckland.

## 2.7 Visited DOC historic sites

Twenty-nine percent of New Zealanders had visited a DOC historic site in the last 12 months.



Base: all respondents 3,885

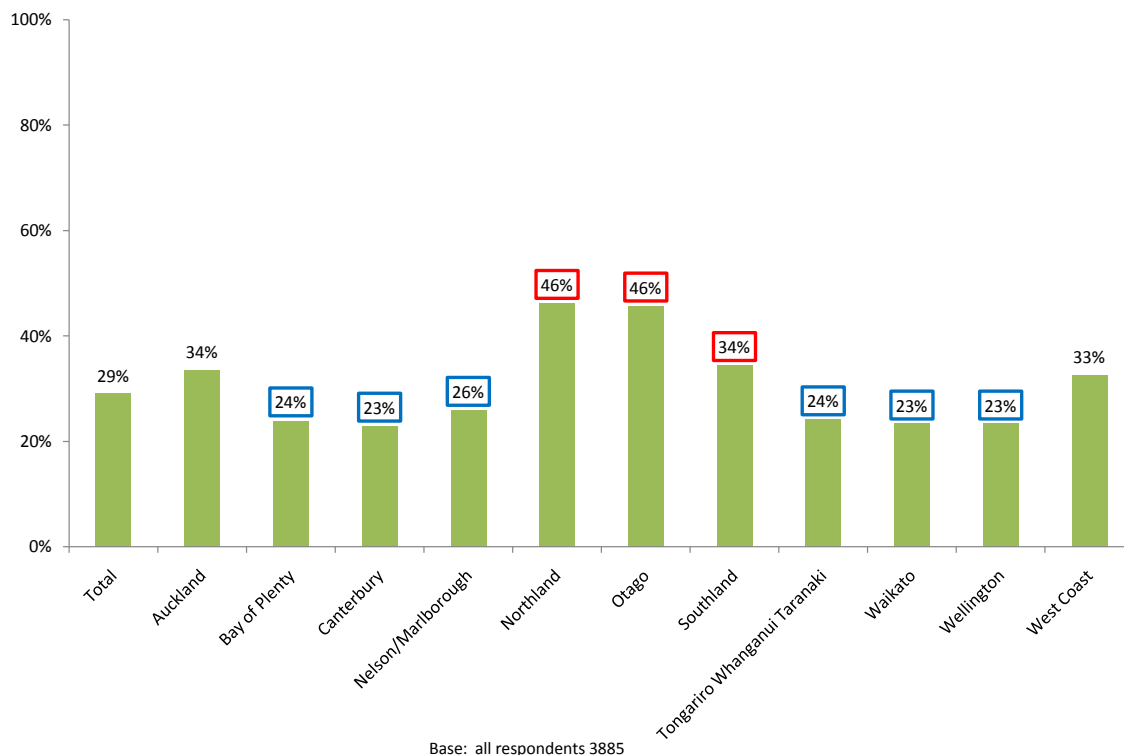
People who were significantly more likely to say they **had visited** DOC historic sites were:

- 55 years plus
- Income \$60,001 plus
- Rural
- Northland, Otago, Southland.

People who were significantly more likely to say they **had not visited** DOC historic sites were:

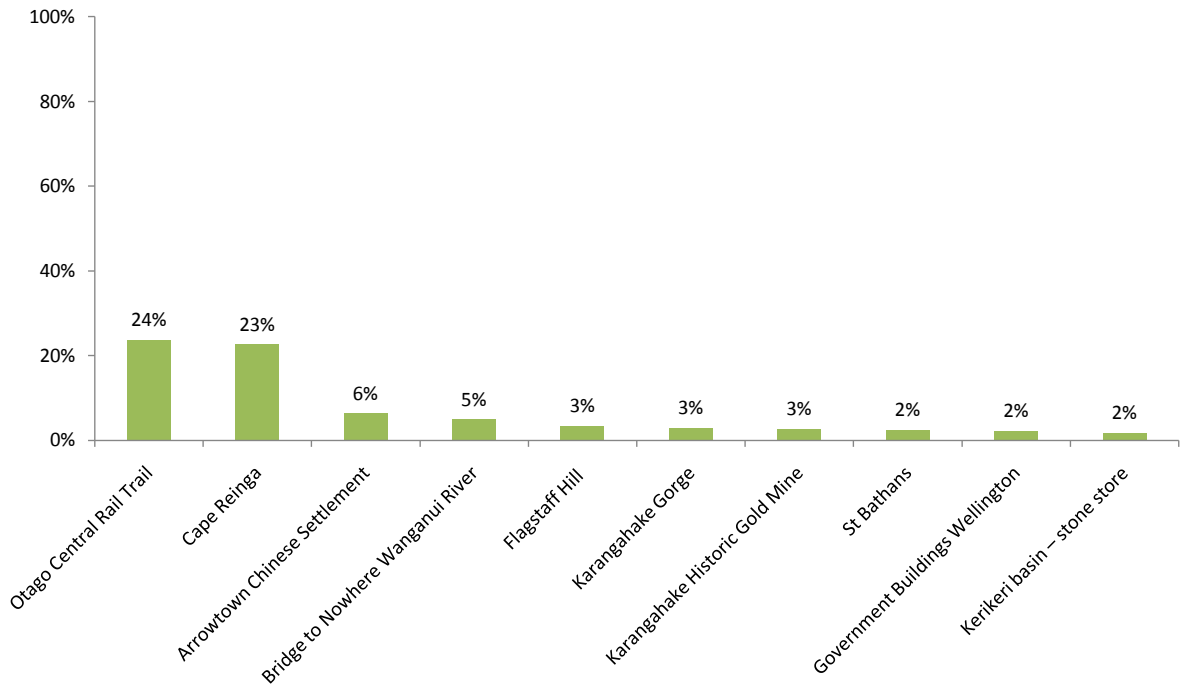
- 18-24 years
- Asian
- Income below \$60,000
- Small city/large town
- Maori, Pacific, Asian
- Bay of Plenty Canterbury, Nelson/Marlborough, Tongariro/Whanganui/Taranaki, Waikato, Wellington.

### Visited DOC historic site in last 12 months (yes)



A wide range of DOC historic sites were visited by New Zealanders, the most popular were: Otago Central Rail Trail (24% of those who had visited a historic site) and Cape Reinga (23% of those who had visited a historic site)

### Historic Sites visited in last 12 months (sites visited by more than 1%)



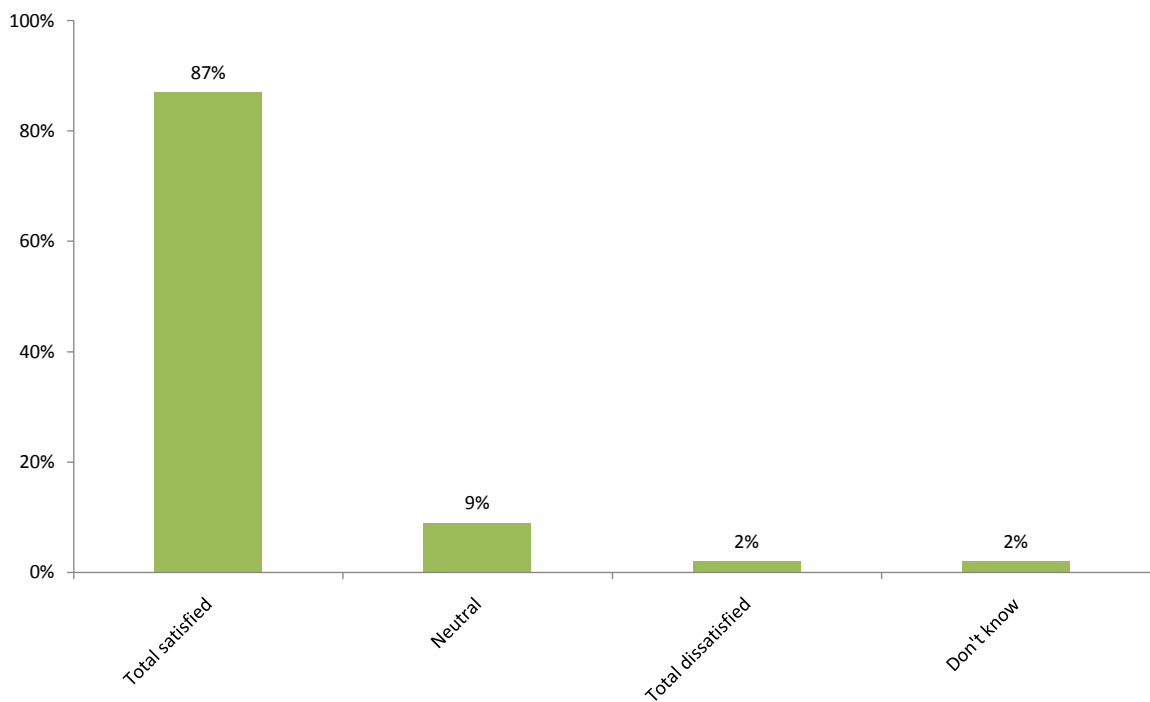
Base: visited DOC Historic Site in last 12 months 428  
 Sample too small for significant differences by site

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

Most visitors to DOC historic sites were satisfied with their heritage experience at the DOC historic site they visited most recently (87%).

Those aged 55 years plus were statistically significantly more likely to be satisfied than the total sample of historic site visitors.

### Satisfaction with heritage experience at DOC historic site



Base: visited DOC Historic Site in last 12 months 428

## 2.9 Visiting DOC area in home Conservancy

In 2012, 44 percent of New Zealanders had visited a DOC area in their home Conservancy in the last 12 months. There was a statistically significant decrease in the proportion who said they had visited a DOC area in their home Conservancy in the last 12 months between 2011 and 2012 (49% - 44%). There was a corresponding statistically significant increase in the proportion who said they had not visited a DOC area in their home Conservancy in the last 12 months between 2011 and 2012 (39% - 44%).

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



Base: all respondents 2011 3614, 2012 3885

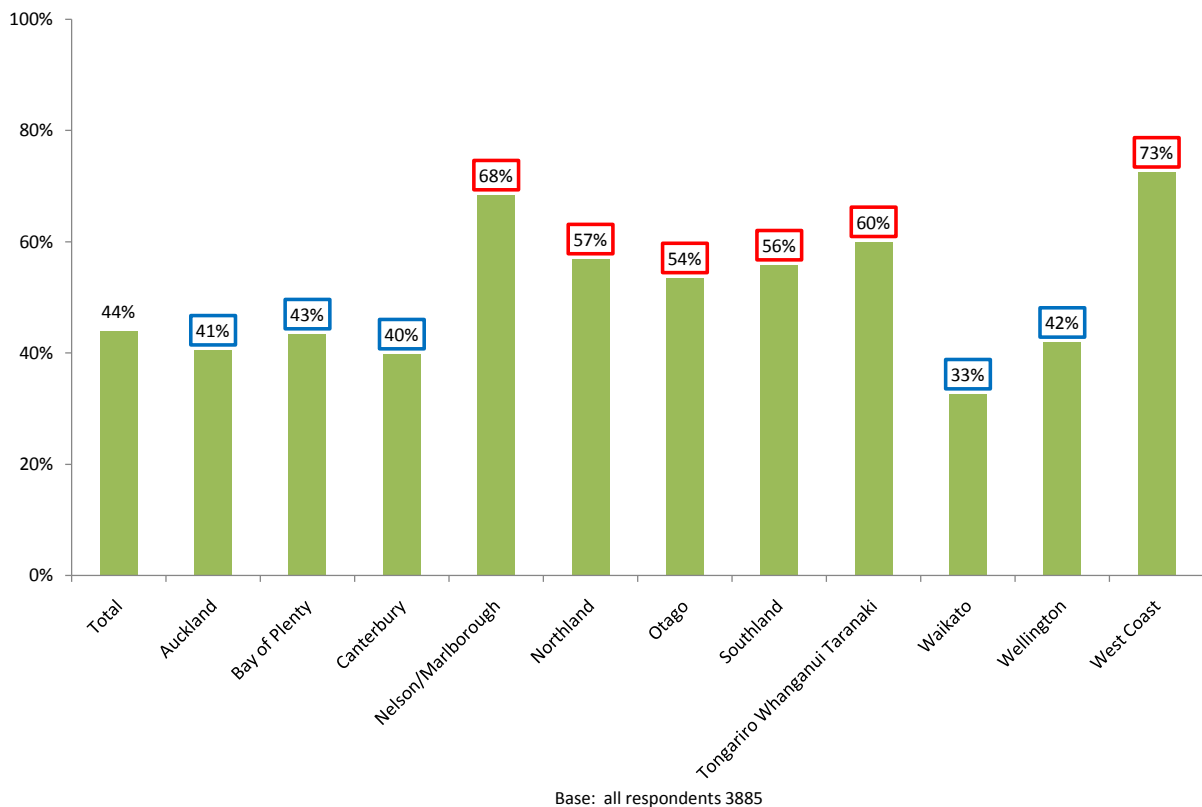
The following groups were statistically significantly more likely to **have** visited a DOC area in the home Conservancy in the last 12 months:

- Male
- 25-54 years
- Income \$60,001 plus
- Small town
- Rural
- Favourable view of DOC
- Nelson/Marlborough, Northland, Otago, Southland, Tongariro/Whanganui/Taranaki, West Coast.

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

- 18-24 years
- 55 years plus
- Pacific
- Asian
- Income below \$60,000
- Small city/large town
- Auckland, Bay of Plenty, Canterbury, Waikato, Wellington.

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

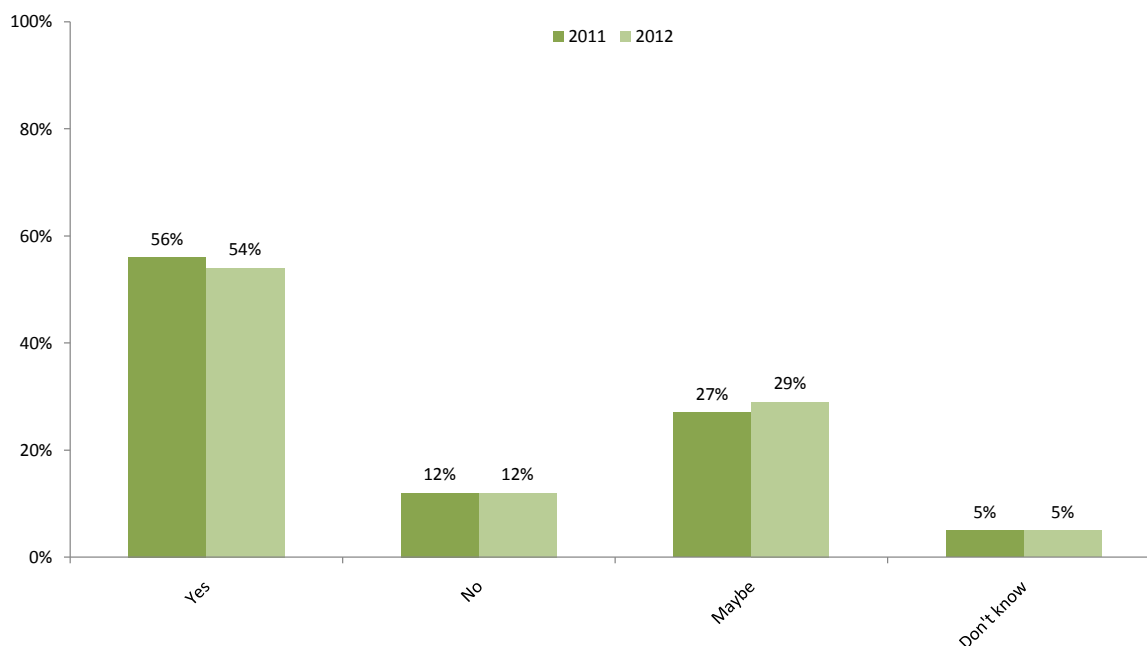


There was no statistically significant changes over time in the proportions who said they had visited a DOC area in their home Conservancy for the individual Conservancies.



Just over half (54%) of New Zealanders said they were likely to visit a DOC area in their home Conservancy within the next 12 months. There has been no statistically significant change between 2011 and 2012 for this measure.

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



Base: all respondents 2011 3614, 2012 3885

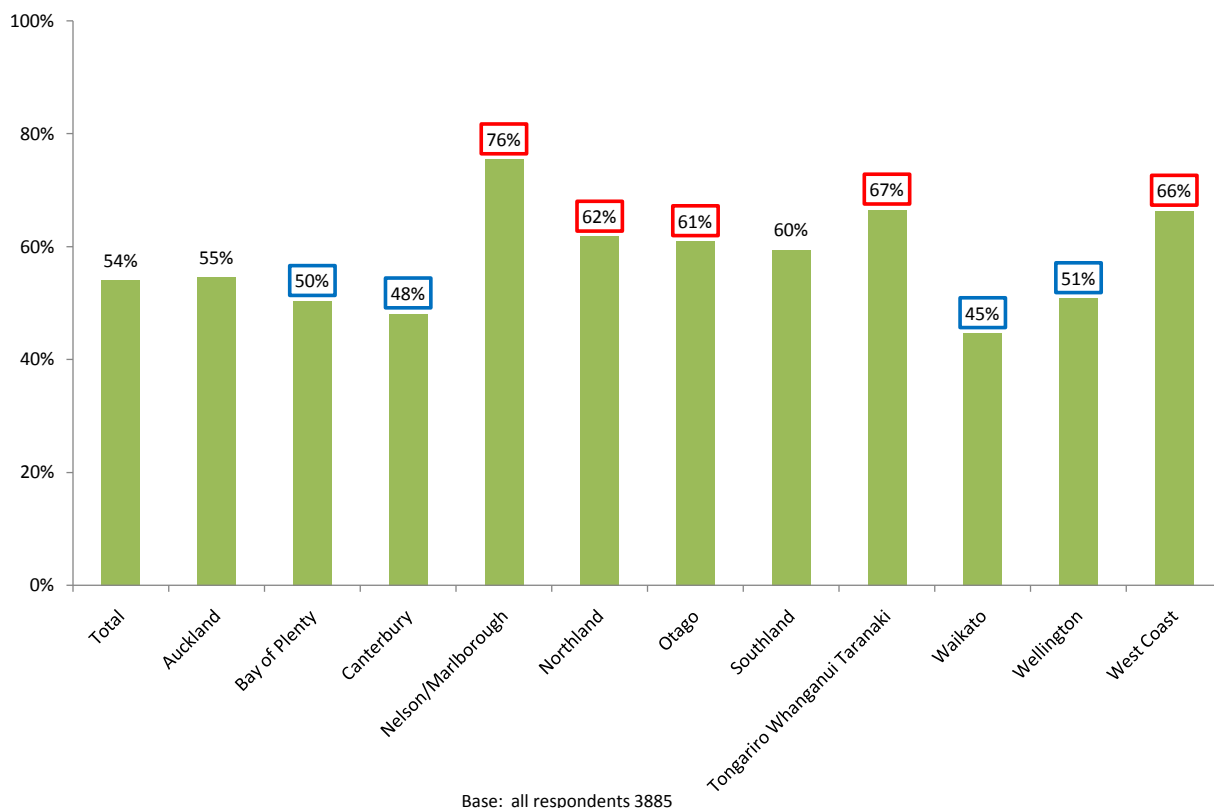
The following groups were statistically significantly more likely to say they will visit a DOC area in their home Conservancy:

- 25-54 years
- Income \$60,001 plus
- Small town
- Favourable view of DOC
- Nelson/Marlborough, Northland, Otago, Tongariro/Whanganui/Taranaki, West Coast.

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

- 55 years plus
- Maori, Pacific, Other ethnicity (not Pakeha, Maori, Pacific or Asian)
- Income below \$40,000
- Small city/large town
- Bay of Plenty, Canterbury, Waikato, Wellington.

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

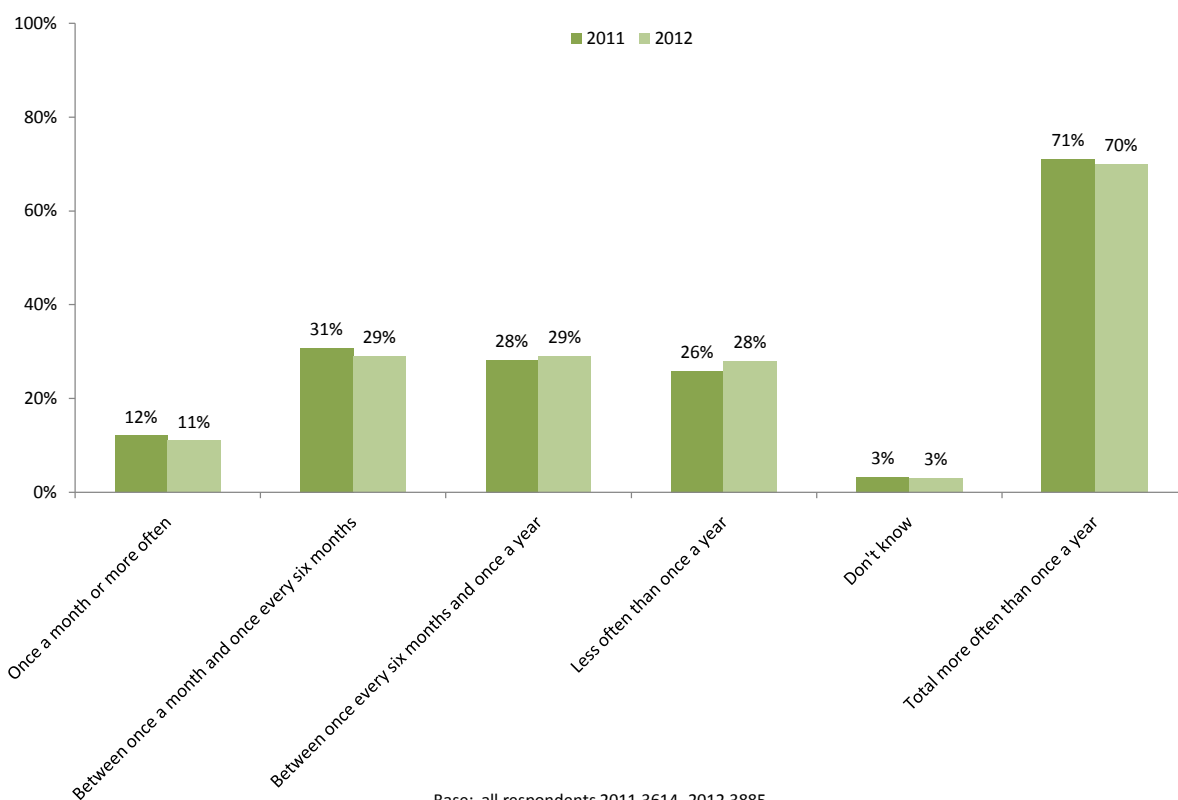


There was one statistically significant change over time in the proportion who said they visited a DOC area in their home Conservancy for the individual Conservancies (West Coast 75% in 2011 and 66% in 2012).

## 2.10 Frequency of using DOC areas for recreation

Eleven percent of New Zealanders say they visit a DOC area for recreation at least once a month, a further 29 percent at least once every six months and 29 percent at least once a year. A total of 70 percent of New Zealanders say they use a DOC area for recreation at least once a year.

### Frequency of using DOC areas (defined by respondent) for recreation



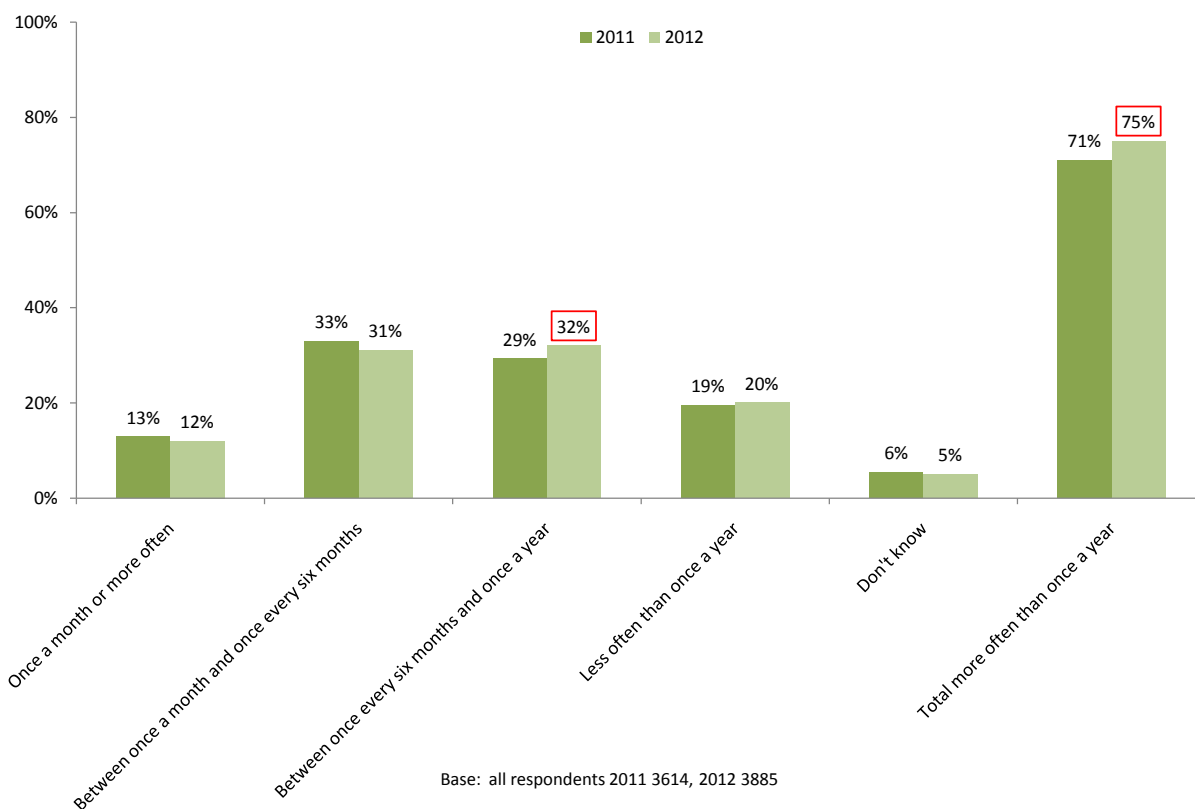
#### Significantly more likely to currently use DOC areas at the following frequencies:

<b>Once a month or more often</b>	Male, 25-39 years, Maori, Other ethnicity (not Pakeha, Maori, Pacific or Asian), small town, rural, unfavourable view of DOC, Nelson/Marlborough, Otago, West Coast
<b>Between once a month and once every six months</b>	Male, 25-54 years, Income \$60,001 plus, favourable view of DOC, Nelson/Marlborough, Northland
<b>Between once every six months and once a year</b>	55 years plus
<b>Less often than once a year</b>	55 years plus, Maori, income up to \$40,000, Bay of Plenty, Wellington, Waikato

## 2.11 Likelihood to visit a DOC area for recreation in the future

Seventy-five percent of New Zealanders said they were likely to visit a DOC area for recreation in the future. This is a statistically significant increase on the 2011 result of 71%.

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

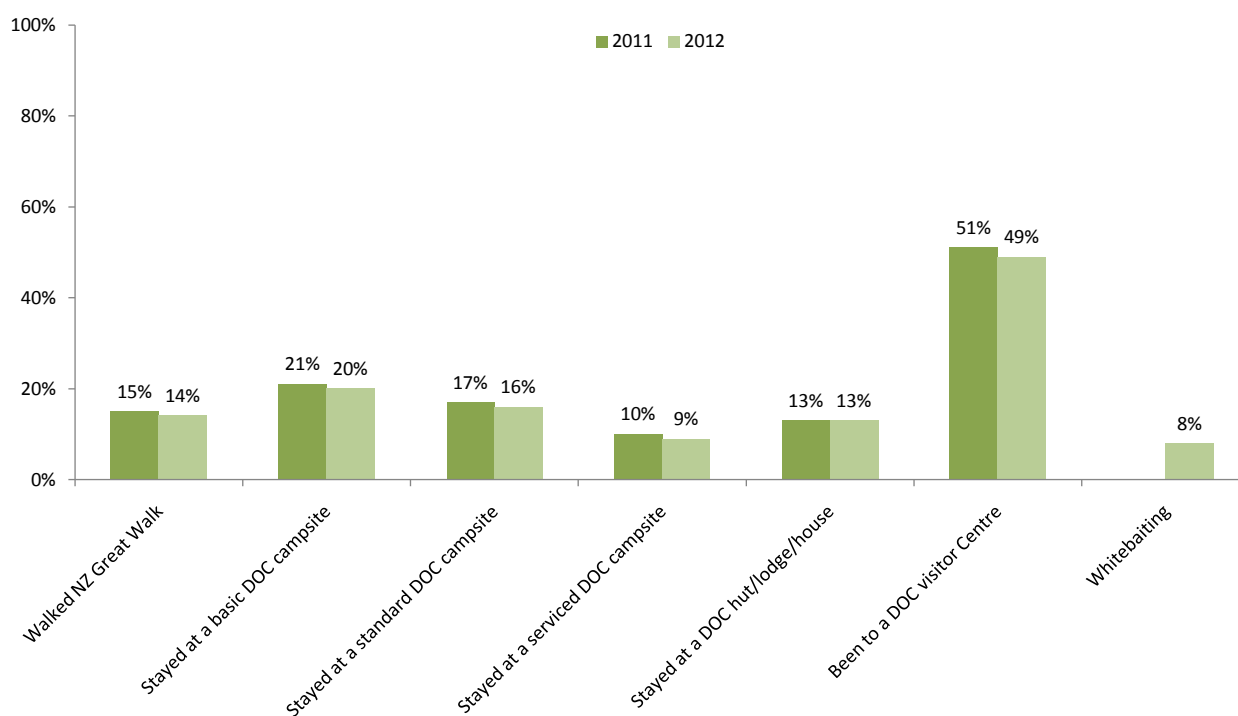


Significantly more likely to say they will visit a DOC area for recreation in the future:	
Once a month or more often	25-54 years, Maori, small town, unfavourable view of DOC, Bay of Plenty, Nelson/Marlborough, West Coast
Between once a month and once every six months	Male, 25-54 years, income \$60,001 plus, favourable view of DOC, Nelson/Marlborough/Marlborough, Northland
Between once every six months and once a year	-
Less often than once a year	55 years plus, Pacific, income up to \$40,000, Waikato

## 2.12 DOC facilities used in the last three years

Nearly half (49%) of New Zealanders had visited a DOC Visitors Centre within the last three years. Twenty percent had stayed at a basic DOC campsite. Less than 20 percent had: stayed at a standard DOC campsite (16%), walked a NZ Great Walk (14%), stayed at a DOC hut/lodge/house (13%), stayed at a serviced DOC campsite (9%) and/or been whitebaiting (8%). There were no statistically significant differences between 2011 and 2012.

### DOC facilities used in the last three years



Base: all respondents 2011 3614, 2012 3885

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

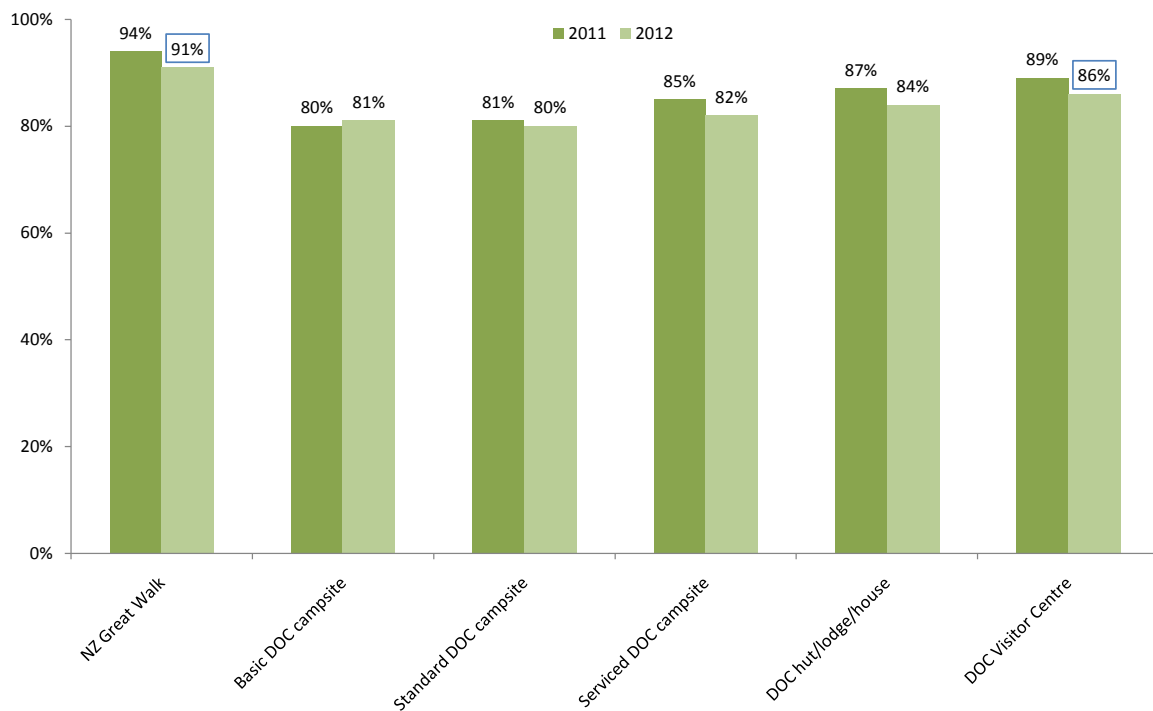
Great Walk	Basic campsite	Standard campsite	Serviced campsite	Hut/lodge/house	Visitor's Centre
40-54 years	Male	Male	18-24 years	Male	Male
Income \$60,001 plus	18-24 years	18-24 years	Income \$40,001-\$60,000	18-39 years	40-54 years
Favourable view of DOC	40-54 years	Income \$60,001 plus	Nelson/Marlborough	Income \$60,001 plus	Pakeha
Nelson/Marlborough	Maori	Favourable view of DOC	Tongariro/Whanganui/Taranaki	Otago	Income \$60,001 plus
Otago	Income \$60,001 plus	Nelson/Marlborough		Southland	Favourable view of DOC
	Favourable view of DOC	Northland		West Coast	Nelson/Marlborough
	Nelson/Marlborough				Otago
	Otago				Southland
	Southland				Tongariro/Whanganui/Taranaki
					West Coast

The following were statistically significantly less likely to say they had used each of the facilities:

Great Walk	Basic campsite	Standard campsite	Serviced campsite	Hut/lodge/house	Visitor's Centre
55 years plus	Female	Female	55 years plus	Female	Female
Income up to \$40,000	55 years plus	55 years plus	Income up to \$40,000	55 years plus	18-24 years
Small town	Asian	Wellington	Auckland	Income up to \$40,000	Pacific
Northland	Income up to \$40,000			Rural	Asian
	Wellington				Income up to \$40,000
					Small city/large town
					Bay of Plenty
					Northland
					Waikato

Satisfaction is high for all facilities, ranging from 80 percent satisfaction for standard DOC campsites to 91 percent for NZ Great Walks. There has been a statistically significant decreased between 2011 and 2012 for satisfaction with NZ Great Walks (94% - 91%) and DOC Visitor Centres (89% - 86%).

### Satisfaction with DOC facilities (combined satisfied and very satisfied)

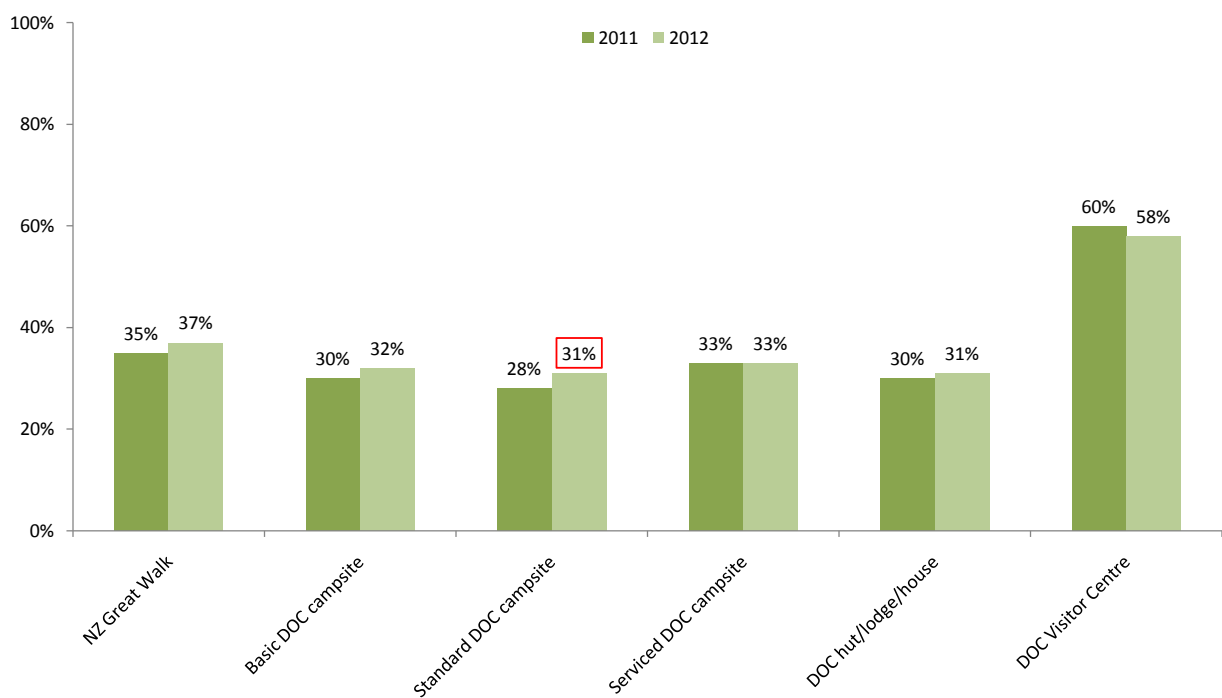


Base 2011: Great Walk 610, Basic camp 828, Standard camp 644, Serviced camp 387, hut 544, Visitor's Centre 1929  
 Base 2012: Great Walk 590, Basic camp 828, Standard camp 640, Serviced camp 363, hut 528, Visitor's Centre 2023

## 2.13 Likelihood to use DOC facilities in the next three years

Fifty-eight 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 (37%), serviced DOC campsite (33%), basic DOC campsite (32%), DOC hut/lodge/house (31%) and/or a standard DOC campsite (31%). There was a statistically significant increase between 2011 and 2012 in those who said they were likely to use a standard DOC campsite within the next three years (28% - 31%).

### Likely to use DOC facilities in the next three years



Base: all respondents 2011 3614, 2012 3885



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

Great Walk	Basic campsite	Standard campsite	Serviced campsite	Hut/lodge/house	Visitor's Centre
18-54 years	Male	Male	25-54 years	Male	40-54 years
Asian	18-54 years	18-54 years	Asian	25-54 years	Income \$60,001 plus
Income \$60,001 plus	Income \$40,001 plus	Income \$40,001-\$60,000	Income \$60,001 plus	Asian	Big city
Favourable view of DOC	Small town	Rural	Rural	Income \$60,001 plus	Favourable view of DOC
	Rural	Northland	Favourable view of DOC	Favourable view of DOC	Nelson/Marlborough
				Otago	Otago
					Southland
					West Coast

The key reasons for being **keen to use** each of the facilities were as follows:

Great Walk	Basic campsite	Standard campsite	Serviced campsite	Hut/lodge/house	Visitor's Centre
Good experience/fun/enjoyment	Good experience/fun/enjoyment	Good experience/fun/enjoyment	Good experience/fun/enjoyment	Good experience/fun/enjoyment	Good source of information
Scenery	To see wild life/nature	Good value for money	Family time	To see wild life/nature	Good experience/fun/enjoyment
Physical challenge	Rest/take a break/get away from it all	Rest/take a break/get away from it all	Rest/take a break/get away from it all	Rest/take a break/get away from it all	To get information/advice
On my list of things I want to	Good value for money	Family time	Good value for money	Family time	To see wild life/nature
To see wild life/nature	Scenery	To see wild life/nature	To see wild life/nature	Scenery	Family time
Family time	Family time	Scenery	Scenery	Good value for money	Scenery
Rest/take a break/get away from it all	Physical challenge	Physical challenge	Staying in DOC campsite/hut for the track/tramp	Physical challenge	Rest/take a break/get away from it all
Good value for money	On my list of things I want to	On my list of things I want to do	On my list of things I want to	On my list of things I want to	Good value for money
	Like camping/simplicity of camping	Staying in a DOC campsite/hut	Physical challenge	Staying in DOC campsite/hut for convenience	On my list of things I want to

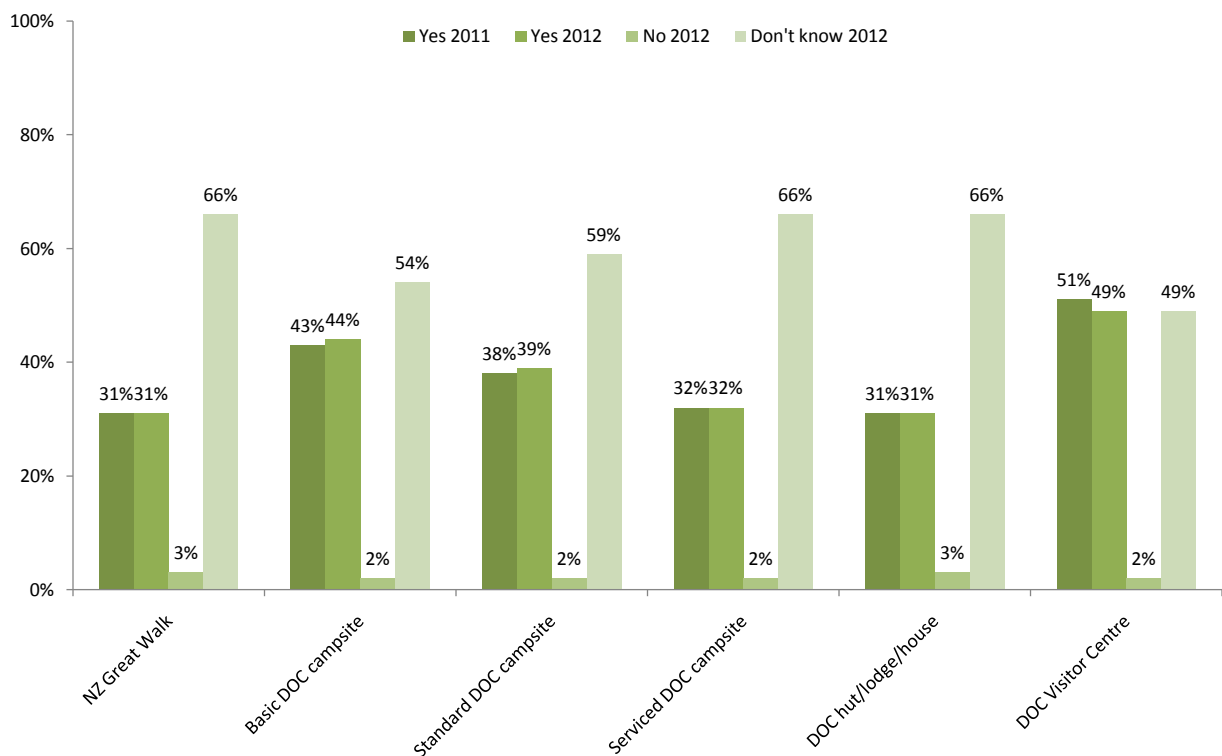
The key reasons for **not being keen** to use each of the facilities were as follows:

Great Walk	Campsites	Hut/lodge/house	Visitor's Centre
I am too old/not mobile enough	Have Bach/family bach/motor home/caravan	Just not interested	Just not interested
Children too young	I am too old/not mobile enough	I am too old/not mobile enough	I am too old/not mobile enough
Not fit enough/too lazy	Just not interested	Would rather go to another place	Would rather go to another place
Just not interested	Would rather go to another place	Have Bach/family bach/motor home/caravan	Not enough time
Cost to access DOC facilities	Don't like it	Not fit enough/too lazy	Don't know where they are
Not enough time	Not fit enough/too lazy	Cost to access DOC facilities	
Don't like it	Children too young	Don't like it	
Would rather go to another place	Prefer home comforts	Children too young	
	Not enough time	Not enough time	
		Prefer home comforts	

## 2.14 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. There have been no statistically significant changes between 2011 and 2012.

### Service provided at a reasonable price



Base: all respondents 2011 3614, 2012 3885

The groups of people who were statistically significantly more likely to say DOC services are provided at a reasonable price were:

- Great Walk: 40 -54 years, income \$60,001 plus, favourable view of DOC, Canterbury, Otago
- DOC Basic Campsites: 40 -54 years, income \$60,001 plus, rural, favourable view of DOC, Northland
- DOC Standard Campsites: income \$60,001 plus, rural, favourable view of DOC, Nelson/Marlborough, Northland
- DOC Serviced Campsites: income \$60,001 plus, favourable view of DOC, Nelson/Marlborough
- Hut/lodge/house: income \$60,001 plus, favourable view of DOC

- Visitors Centre: 40 years plus, Pakeha, income \$60,001 plus, favourable view of DOC, Nelson/Marlborough, Southland, West Coast.



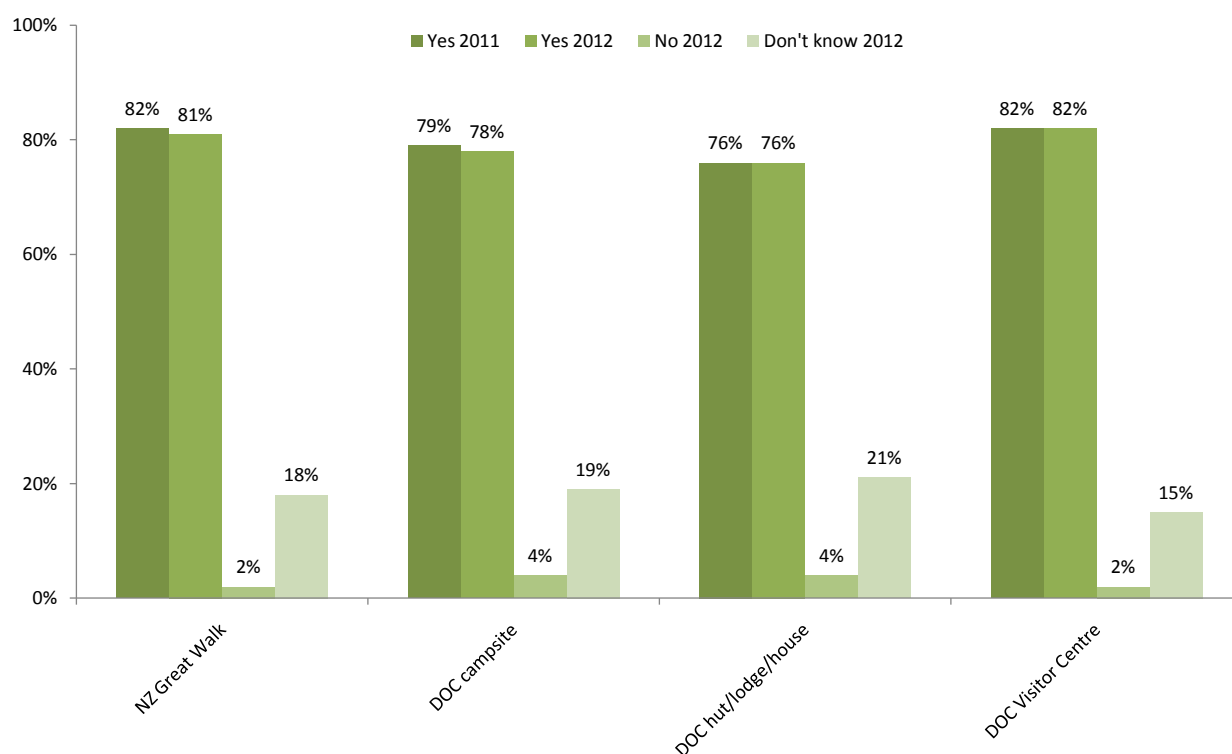
## 2.15 Information about facilities

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. This was not statistically significantly different from the 2011 result.

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, female, 25-54 years, income \$60,001 plus, favourable view of DOC
- DOC Campsites – Pakeha, 40-54 years, income \$60,001 plus, favourable view of DOC
- Hut/lodge/house - Pakeha, 40-54 years, income \$60,001 plus, favourable view of DOC
- Visitors Centre – Pakeha, 55 years plus, income \$60,001 plus, favourable view of DOC.

### Would it be easy to find information about



Base: all respondents 2011 3614, 2012 3885

### 3.0 Conclusions

Awareness of DOC's role as a provider of recreation service was high; most New Zealanders (96%) 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 and Pacific people.

Use of DOC recreation areas was high, with more than half (56%) of New Zealanders having visited a DOC area in the previous 12 months. Predicted use was also high, with 75 percent of New Zealanders saying they were likely to visit a DOC area for recreation in the future. The proportion of New Zealanders visiting DOC areas for recreation and intending to do so in the future is increasing.

Visitors Centres were the most accessed of the core DOC facilities – just under 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.

Fifty-eight 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 37%, Basic DOC Campsite 32%, Standard DOC Campsite 31%, Serviced DOC Campsite 33%, DOC hut/lodge/house 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 previous experiences 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 – 40-54 years, income \$60,001 plus, Nelson/Marlborough, Otago
- Basic Campsites – Male, 18-24 years, 40-54 years, Maori, income \$60,011 plus, Nelson/Marlborough, Otago, Southland
- Standard Campsites – Male, 18-24 years, income \$60,001 plus, Nelson/Marlborough, Northland
- Serviced campsite – 18-24 years, income \$40,001-\$60,000, Nelson/Marlborough, Tongariro/Whanganui/Taranaki
- Hut/lodge/house – Male. 18-39 years, income \$60,001 plus, Otago, Southland, West Coast
- DOC Gateways – Male, 40-54 years, Pakeha, income \$60,001 plus, Nelson/Marlborough, Otago, Southland, Tongariro/Whanganui/Taranaki, West Coast.

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 – good experience, scenery, physical challenge
- Basic Campsite – good experience, see wildlife/nature, rest
- Standard campsite – good experience, good value for money, rest
- Serviced Campsite – good experience, family time, rest
- Hut/lodge/house – good experience, see wildlife/nature, rest
- Visitors Centre – good source of information, good experience, to get information.

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).

## 4.0 Methodology

The Department of Conservation (DOC) undertook a survey of adult New Zealanders (The National Survey) in June 2012 (replicating the survey undertaken in 2011). The National Survey replaced a range of independent general public surveys undertaken by DOC in the past.

The National Survey was a survey of the adult population (18 years plus) of New Zealand. A total of 3,885 people were interviewed for the survey in 2012. The primary methodology was telephone (sample of 2,225) and the secondary methodology was online (sample of 1,660). 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<sup>2</sup> (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 base 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 questions respondents were asked about information, bookings and online services.

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<sup>2</sup> 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

Sample Profile (unweighted numbers and weighted %)					
<b>Gender</b>	N=	%	<b>Household income before tax</b>	N=	%
Male	1,825	48%	\$40,000 or less	931	21%
Female	2,060	52%	\$40,001-\$60,001	693	17%
<b>Age</b>			\$60,001 or more	1,757	48%
24 years or younger	397	15%	Refused/DK	504	14%
25-39 years	1,014	28%	<b>Area</b>		
40-54 years	1,150	28%	Northland	358	4%
55 years plus	1,320	28%	Auckland	347	32%
Refused	4	0%	Waikato	350	9%
<b>Ethnicity (multiple response)</b>			Bay of Plenty	355	8%
Pakeha	3,406	83%	Tongariro / Whanganui / Taranaki	330	6%
Maori	372	11%	Wellington / Hawke's Bay	378	18%
Pacific	57	3%	Nelson / Marlborough	352	3%
Asian	107	5%	West Coast	346	1%
Other	114	3%	Canterbury	354	13%
Refused	32	1%	Otago	356	5%
<b>Location</b>			Southland	359	2%
Big city	877	43%			
Small city/large town	1,326	27%			
Small town	1,028	18%			
Rural	644	12%			
Refused/don't know	10	0%			

The following are statistically significantly higher in the 2012 sample (compared to the 2011 sample):

- 18-24 years
- Asian
- Small town
- Rural
- Wellington/Hawke's Bay (reflecting a redrawing the Conservancy boundary more accurately).

The following are statistically significantly lower in the 2012 sample (compared to the 2011 sample):

- 55 years plus
- Pakeha
- Other ethnicities
- Big city
- Income of \$60,001 plus
- Tongariro/Whanganui/Taranaki (reflecting a redrawing the Conservancy boundary more accurately).

<b>Sample Profile (2011 and 2012 surveys)</b>					
<b>Weighted %</b>					
<b>Gender</b>	2011	2012	<b>Household income before tax</b>	2011	2012
Male	48%	48%	\$40,000 or less	20%	21%
Female	52%	52%	\$40,001-\$60,001	16%	17%
<b>Age</b>			\$60,001 or more	51%	48%
24 years or younger	12%	15%	Refused/DK	12%	14%
25-39 years	28%	28%	<b>Area</b>		
40-54 years	28%	28%	Northland	4%	4%
55 years plus	31%	28%	Auckland	32%	32%
Refused	1%	0%	Waikato	9%	9%
<b>Ethnicity</b> (multiple response possible)			Bay of Plenty	7%	8%
Pakeha	88%	83%	Tongariro / Whanganui / Taranaki	8%	6%
Maori	11%	11%	Wellington / Hawke's Bay	16%	18%
Pacific	3%	3%	Nelson / Marlborough	3%	3%
Asian	4%	5%	West Coast	1%	1%
Other	5%	3%	Canterbury	13%	13%
Refused	1%	1%	Otago	5%	5%
<b>Location</b>			Southland	2%	2%
Big city	47%	43%			
Small city/large town	27%	27%			
Small town	16%	18%			
Rural	9%	12%			