



# **Department of Conservation National Survey**

## **Report 2: Destination Management Framework**

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June 2011

Reporting produced:  
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## 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<sup>1</sup> 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:

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<sup>1</sup> 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.

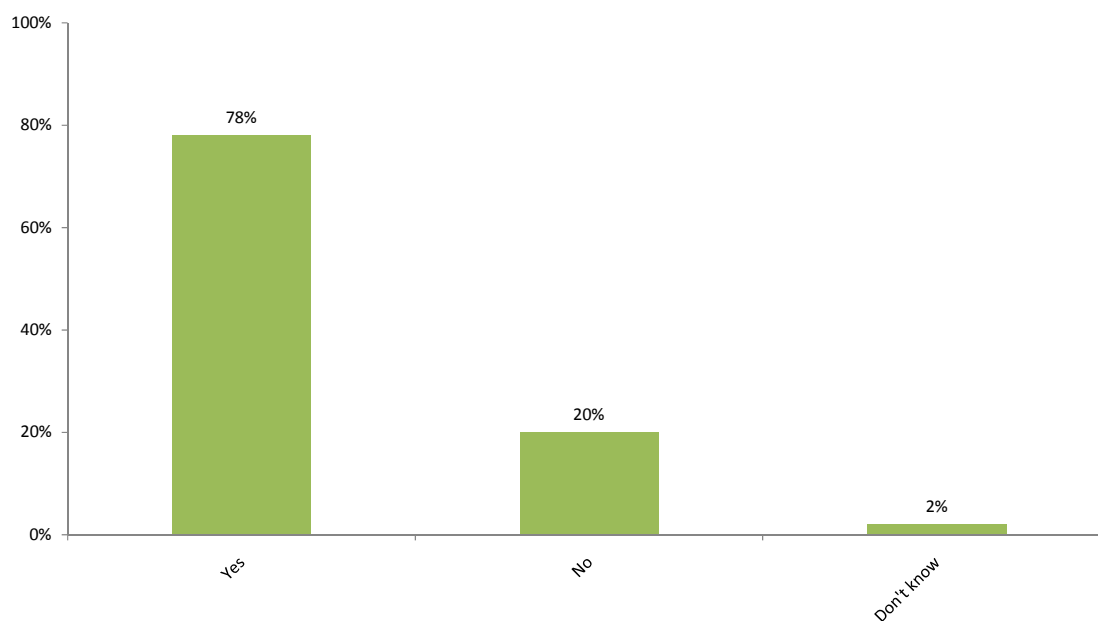
People who were significantly more likely to say they were **aware** DOC provides recreation services were:

- 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



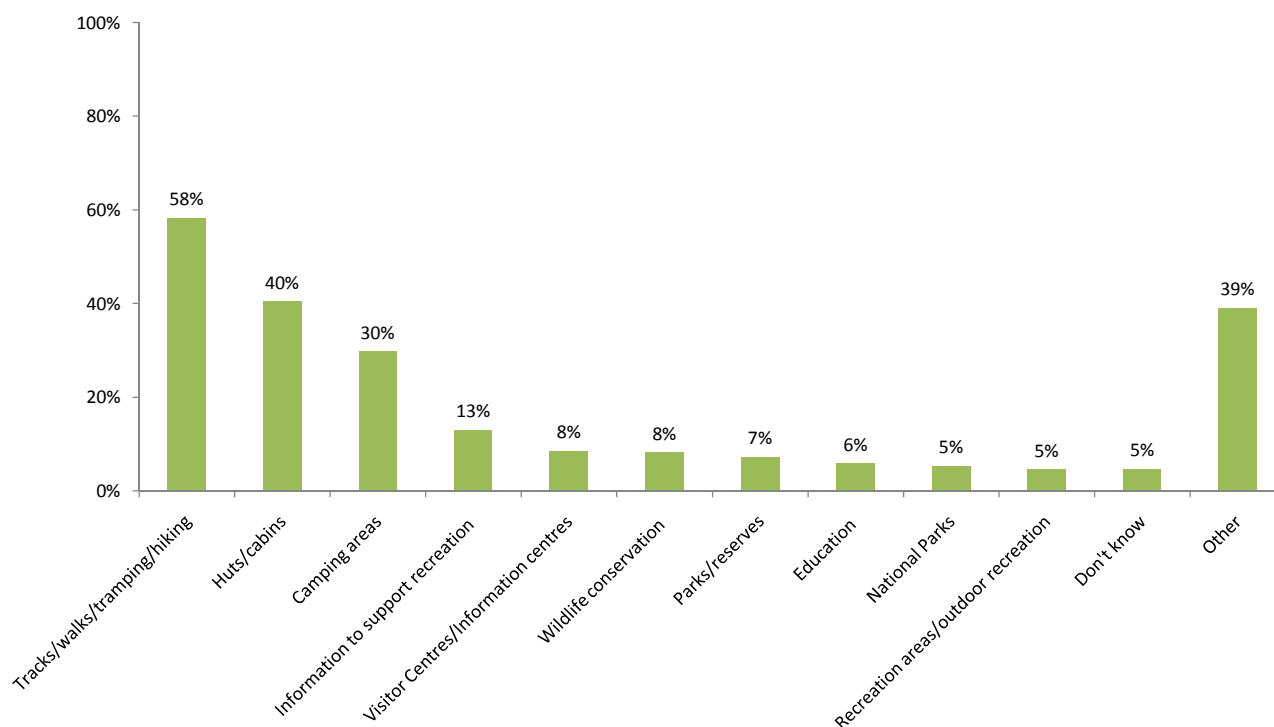
Base: all respondents 3614

## 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.

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



Base: all respondents 3614

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.

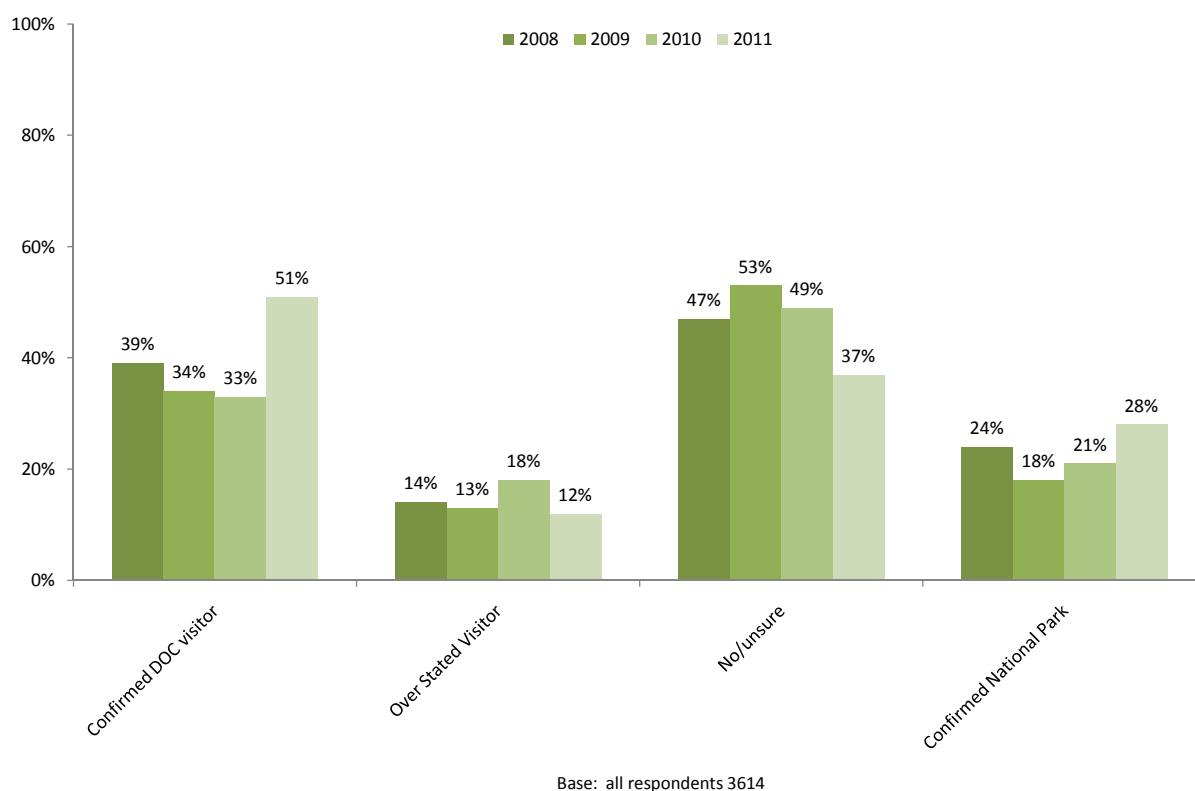
<b>Significantly more likely to mention:</b>	
<b>Tracks/walks/tramping/hiking</b>	25-39 years
<b>Huts/cabins</b>	Male, unfavourable view of DOC
<b>Camping areas</b>	25-39 years, big city, favourable view of DOC
<b>Information to support recreation</b>	-
<b>Visitor Centres/Information Centres</b>	Male, 40-54 years, income \$60,001 +, visited DOC area in last 12 months
<b>Wildlife conservation</b>	55 years +, rural
<b>Parks/reserves</b>	40-54 years
<b>Education</b>	Other ethnicities, unfavourable view of DOC
<b>National Parks</b>	40-54 years, big city
<b>Recreation areas/outdoor recreation</b>	-
<b>Don't know</b>	18-24 years, Pacific, Asian, not visited DOC area in last 12 months

## 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<sup>2</sup>, coding team, fieldwork provider).

### Visited areas managed by DOC in 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.

<sup>2</sup> 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:

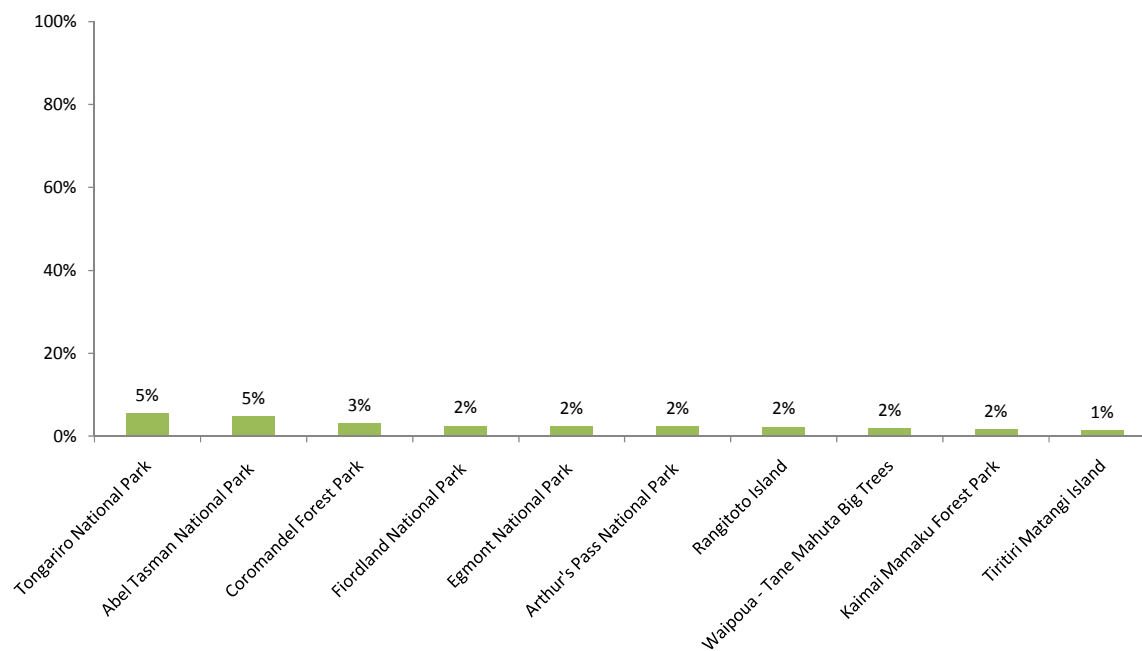
- Male
- Income \$60,001 plus.

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)

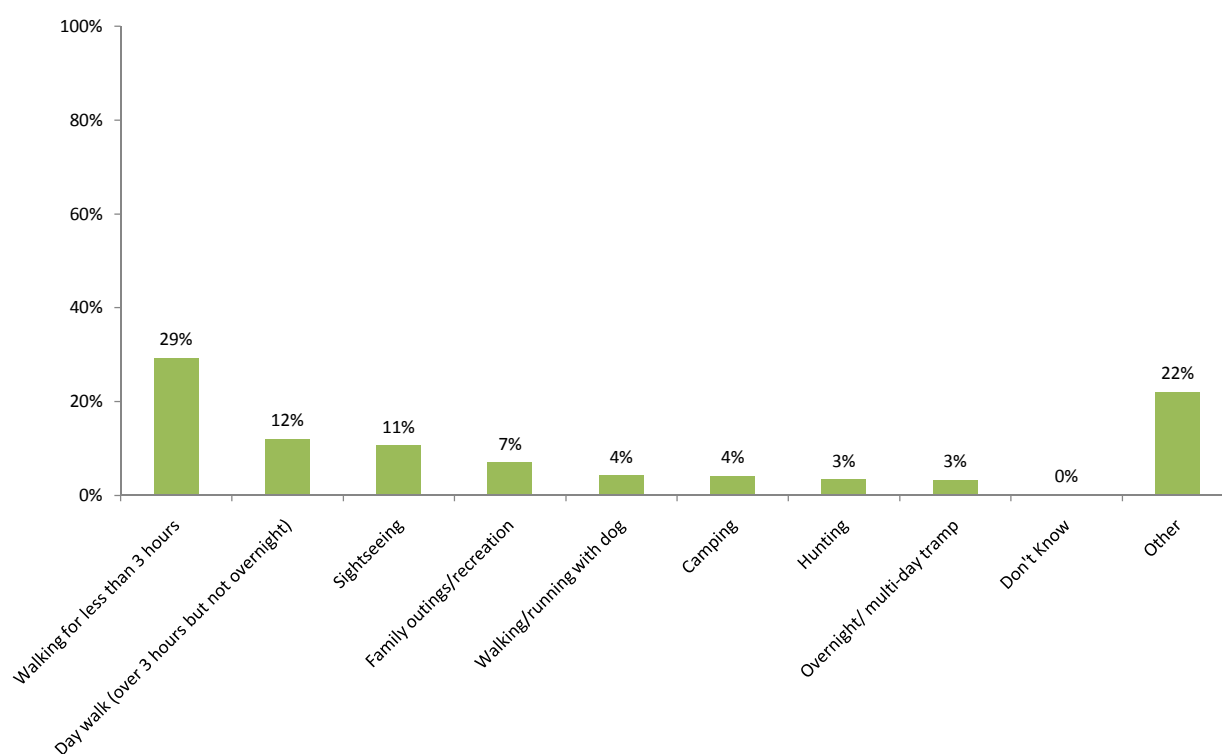


Base: all respondents 3614

## 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% +)



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

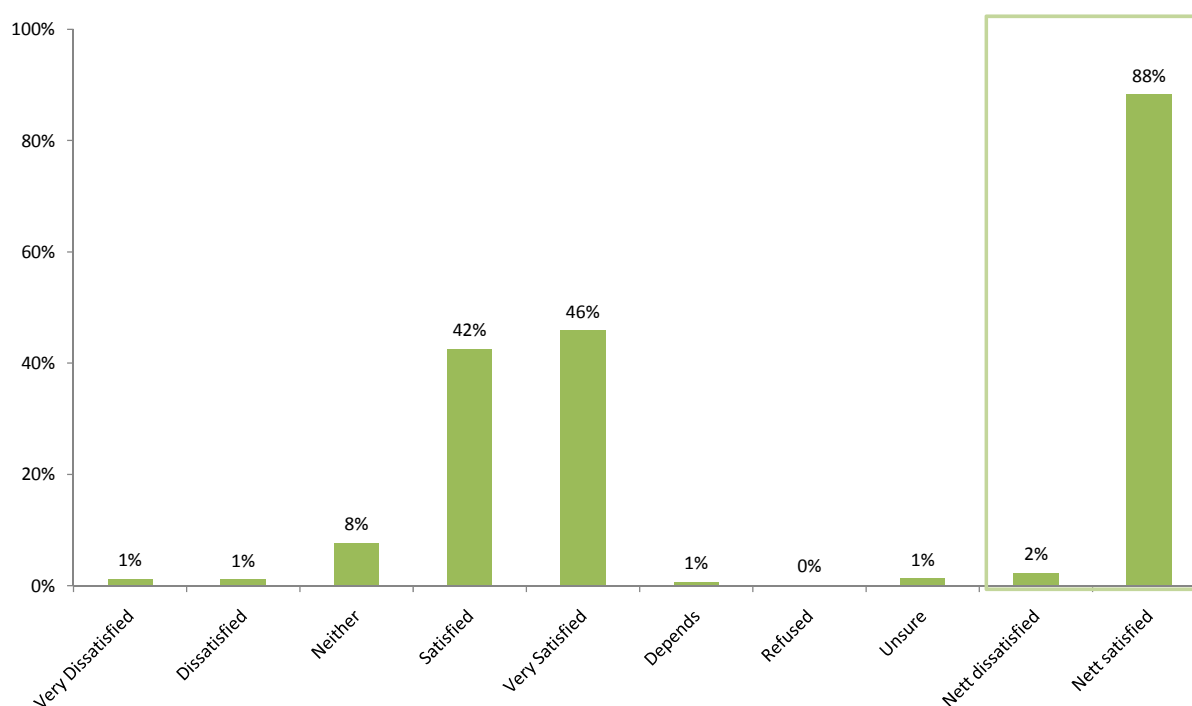
Significantly more likely to have done activity on last visit:	
Walking for less than 3 hours	Female
Day walk (over 3 hours but not overnight)	Asian, other ethnicities
Sightseeing	55 years +, income below \$60,000, unfavourable view of DOC
Family outings/recreation	Female, Maori
Walking/running with dog	Other ethnicities
Hunting	Male, 25-39 years, unfavourable view of DOC

## 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



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.

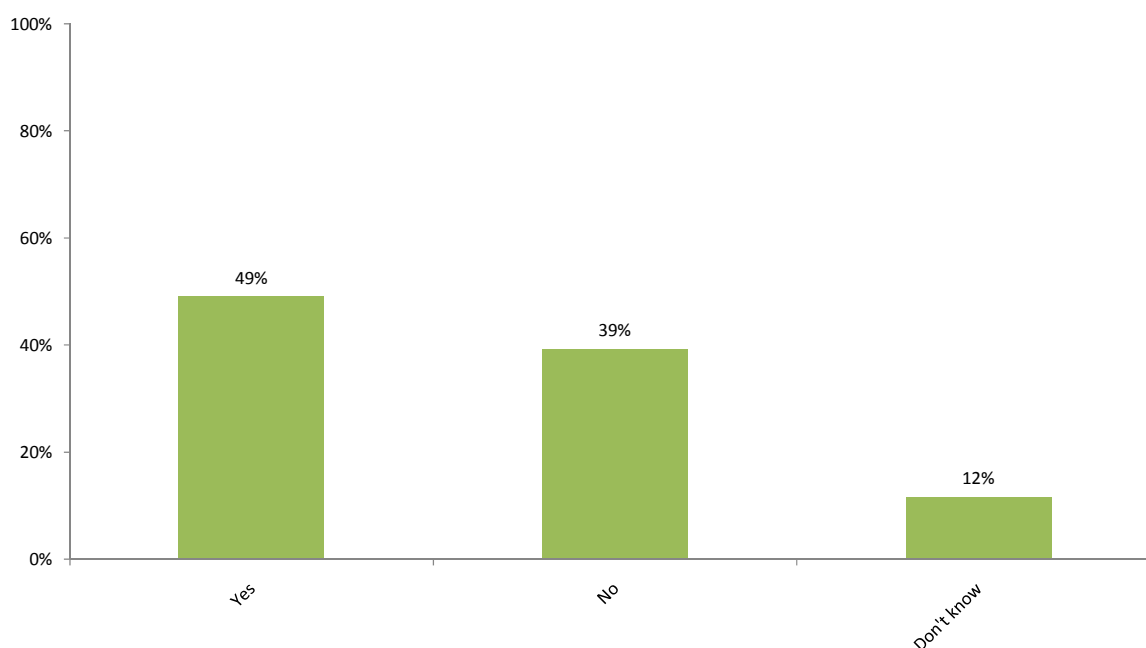
The following groups were statistically significantly more likely to **have** visited a DOC area in the home Conservancy in the last 12 months:

- 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



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.

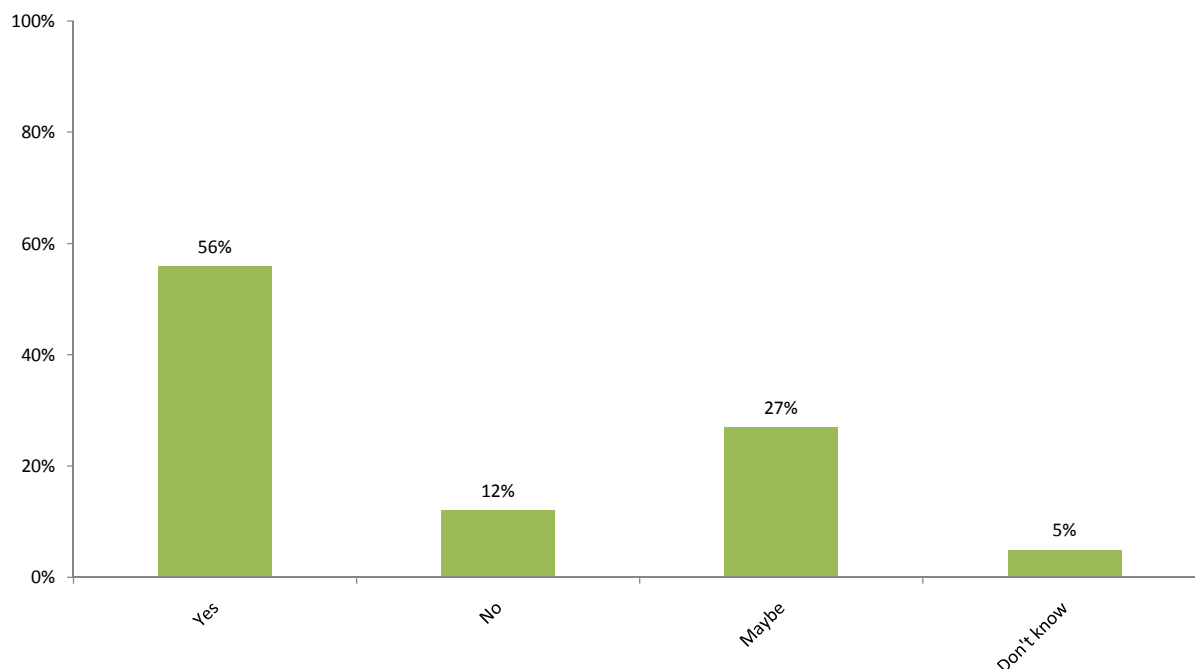
The following groups were statistically significantly more likely to **say they will** visit a DOC area in their home Conservancy:

- 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

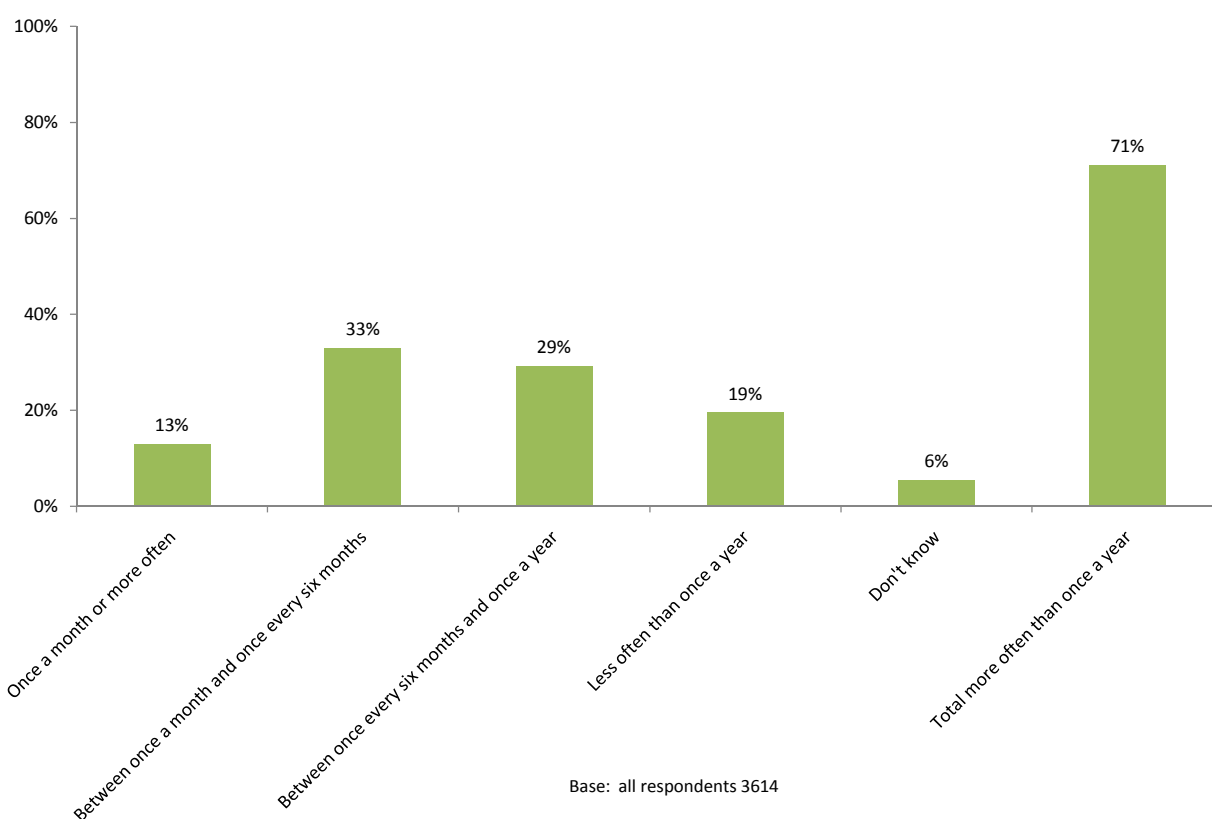
## 2.7 Likelihood to visit a DOC area for recreation in the future

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

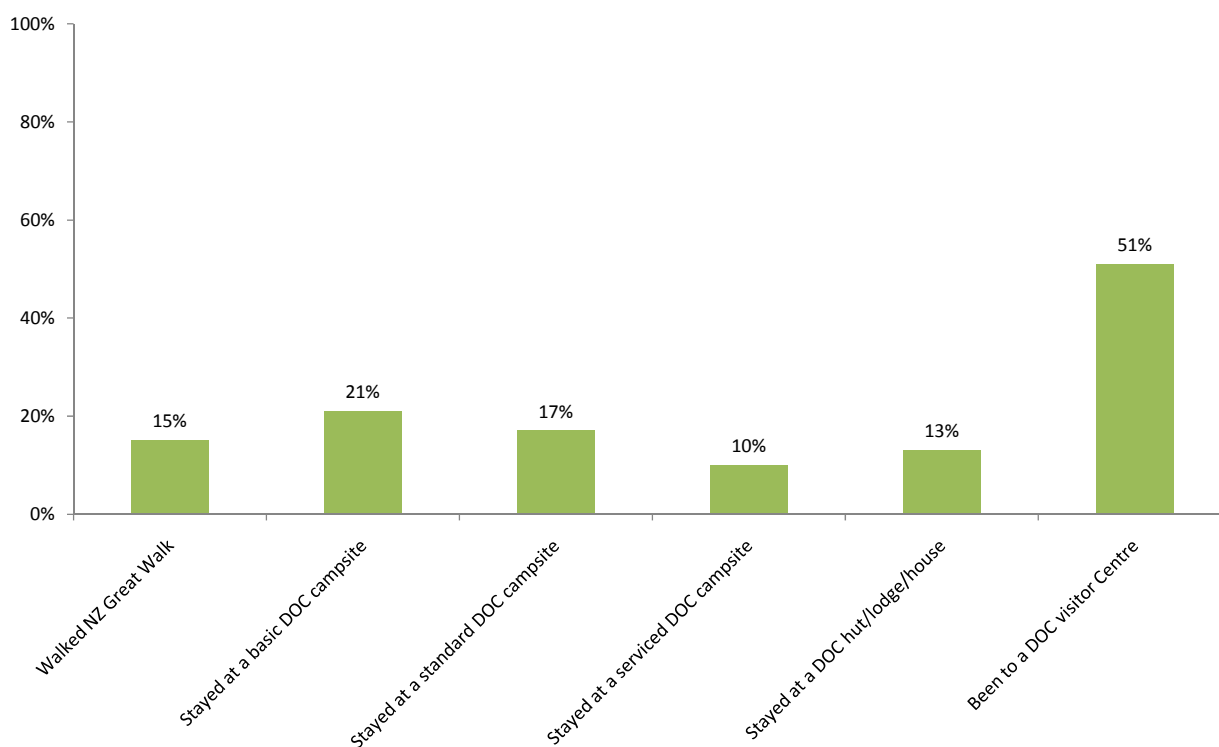


Significantly more likely to say they will visit a DOC area for recreation in the future:	
<b>Once a month or more often</b>	40-54 years, Pacific, income \$60,001 +, small town, favourable view of DOC
<b>Between once a month and once every six months</b>	25-54 years, income \$60,001 +, favourable view of DOC
<b>Between once every six months and once a year</b>	55 years +
<b>Less often than once a year</b>	55 years +, income below \$40,000
<b>Total more often than once a year</b>	25-54 years, income \$60,001+, favourable view of DOC

## 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



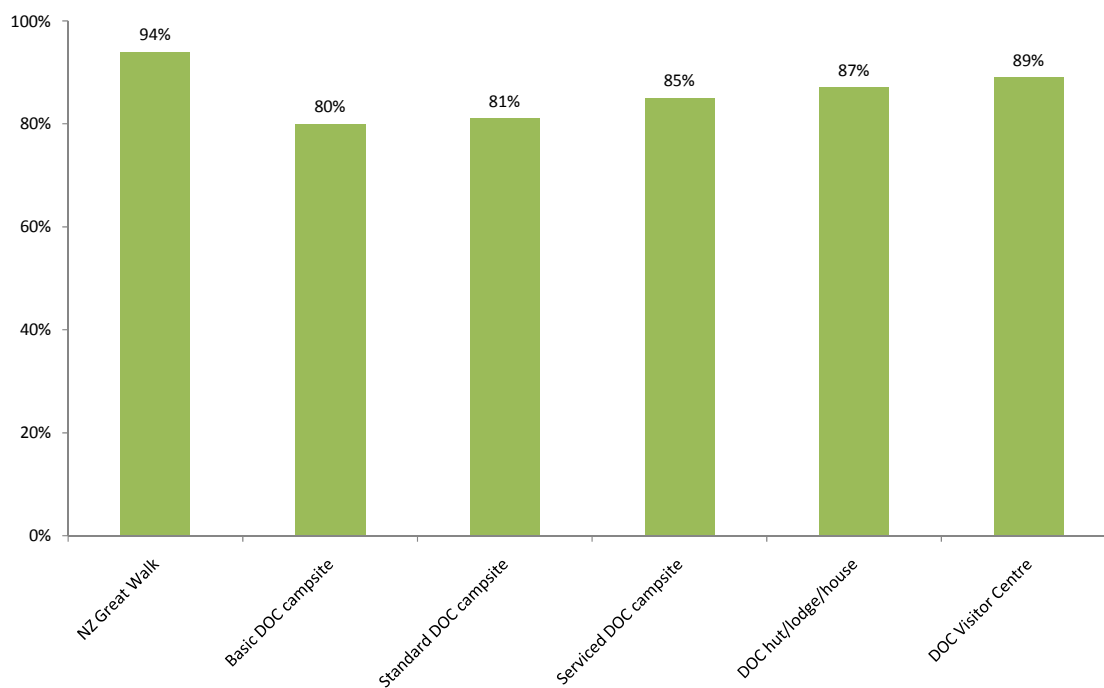
Base: all respondents 3614

The following groups 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
18-24 years	Male	18-24 years	18-24 years	18-24 years	40-54 years
Favourable view of DOC	25-39 years	Pacific	Income \$60,001 +	40-54 years	Income \$60,001 +
	Maori	Favourable view of DOC		Favourable view of DOC	Favourable view of DOC
	Pacific				
	Income \$60,001 +				
	Small town				
	Favourable view of DOC				

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)



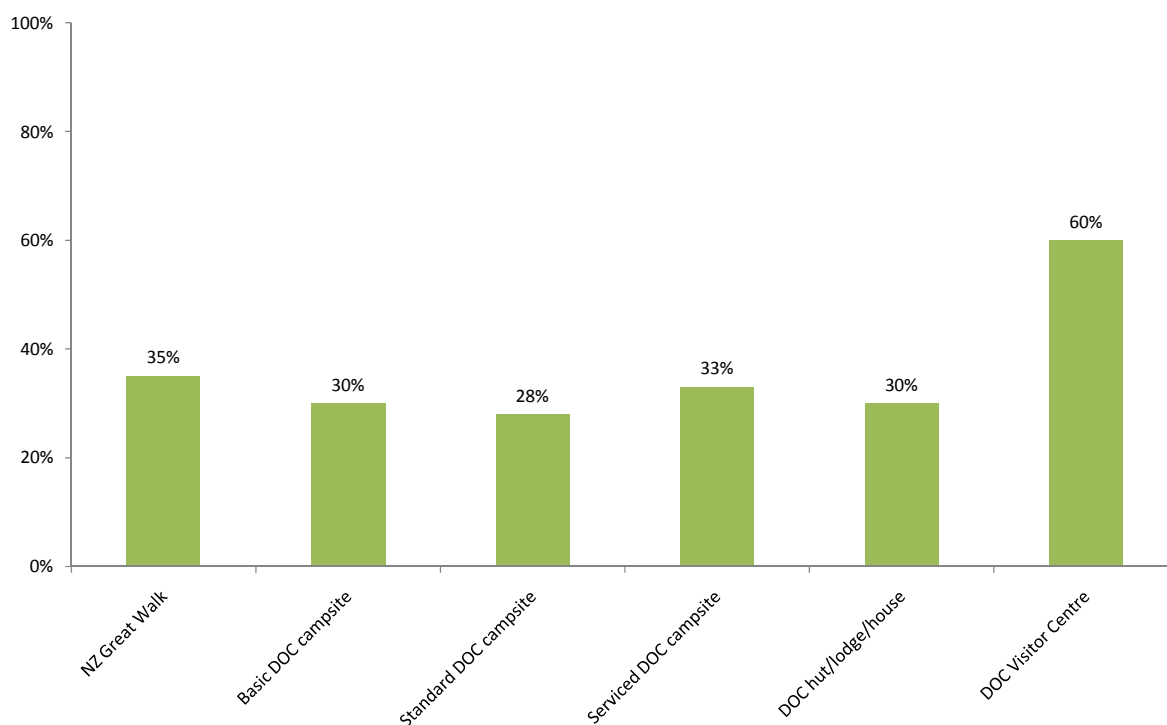
Base: Great Walk 610, Basic camp 828, Standard camp 644, Serviced camp 387, hut 544, Visitor's Centre 1929



## 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%).

### Likely to use in next three years



Base: all respondents 3614

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
18-24 years	Male	18-54 years	18-54 years	40-54 years	40-54 years
Income \$60,001 +	18-54 years	Maori	Other ethnicities	Maori	Income \$60,001 +
Favourable view of DOC	Maori	Income \$60,001 +	Income \$60,001 +	Income \$60,001 +	Favourable view of DOC
Visited DOC area in last 12 months	Pacific	Favourable view of DOC	Favourable view of DOC	Favourable view of DOC	Visited DOC area in last 12 months
	Income \$60,001 +	Visited DOC area in last 12 months	Visited DOC area in last 12 months	Visited DOC area in last 12 months	
	Favourable view of DOC				

	Visited DOC area				
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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
Scenery	Rest/take a break	Rest/take a break	Rest/take a break	Rest/take a break	Information/ advice
On list of things I want to do	Good value for money	Good value for money	Convenience/ comfort	Scenery	Up to date information
Physical challenge	Scenery	Scenery	Family time	Family time	Family time
Rest/take a break	Family time	Family time	Good value for money	Good value for money	Scenery
Family time	Physical challenge	Convenience/ comfort	Scenery	On list of things I want to do	Rest/take a break
Good value for money	On list of things I want to do	Physical challenge	On list of things I want to do	Physical challenge	Good value for money
Good experience	Self sufficient/ back to basics	On list of things I want to do	Physical challenge	Convenience/ comfort	On list of things I want to do
Wildlife/nature	Like camping/ simplicity	Self sufficient/back to basics			Education/ conservation
Tramping	Wildlife/nature				Show/teach kids

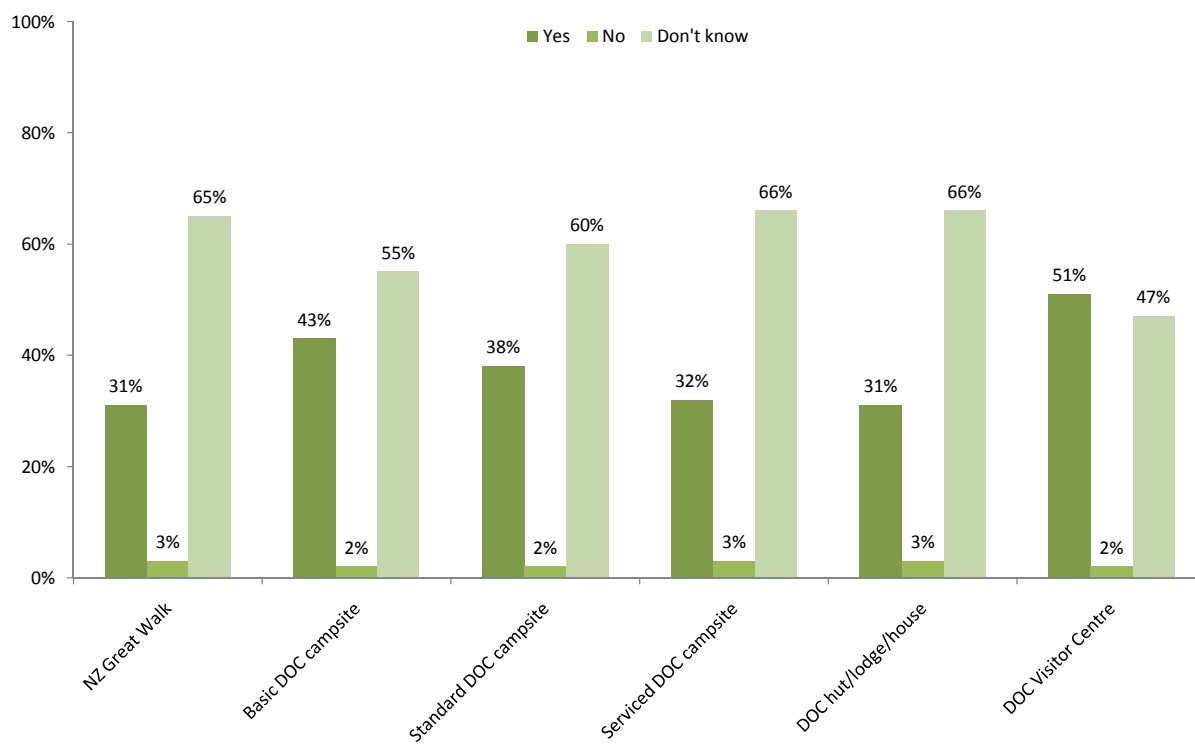
The key reasons for **not being keen** to use each of the facilities were as follows:

Great Walk	Basic campsite	Standard campsite	Serviced campsite	Hut/lodge/house	Visitor's Centre
Age/mobility	Age/mobility	Would rather go somewhere else	Would rather go somewhere else	Age/mobility	Not interested
Not fit/lazy	Not interested	Not interested	Not interested	Not interested	Age/mobility
Children too young	Would rather go somewhere else	Age/mobility	Age/mobility	Would rather go somewhere else	Don't know where they are
Not interested	Not into camping	Children too young	Children too young	Children too young	Would rather go somewhere else
Too busy	Children too young	Prefer more facilities	Prefer more facilities	Not fit/lazy	No need
Would rather go somewhere else	Not fit/lazy	Prefer home comforts	Prefer home comforts	Too busy	Too busy
Cost	Too busy	Not fit/lazy	Not fit/lazy		
	Prefer home comforts				

## 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



Base: all respondents 3614

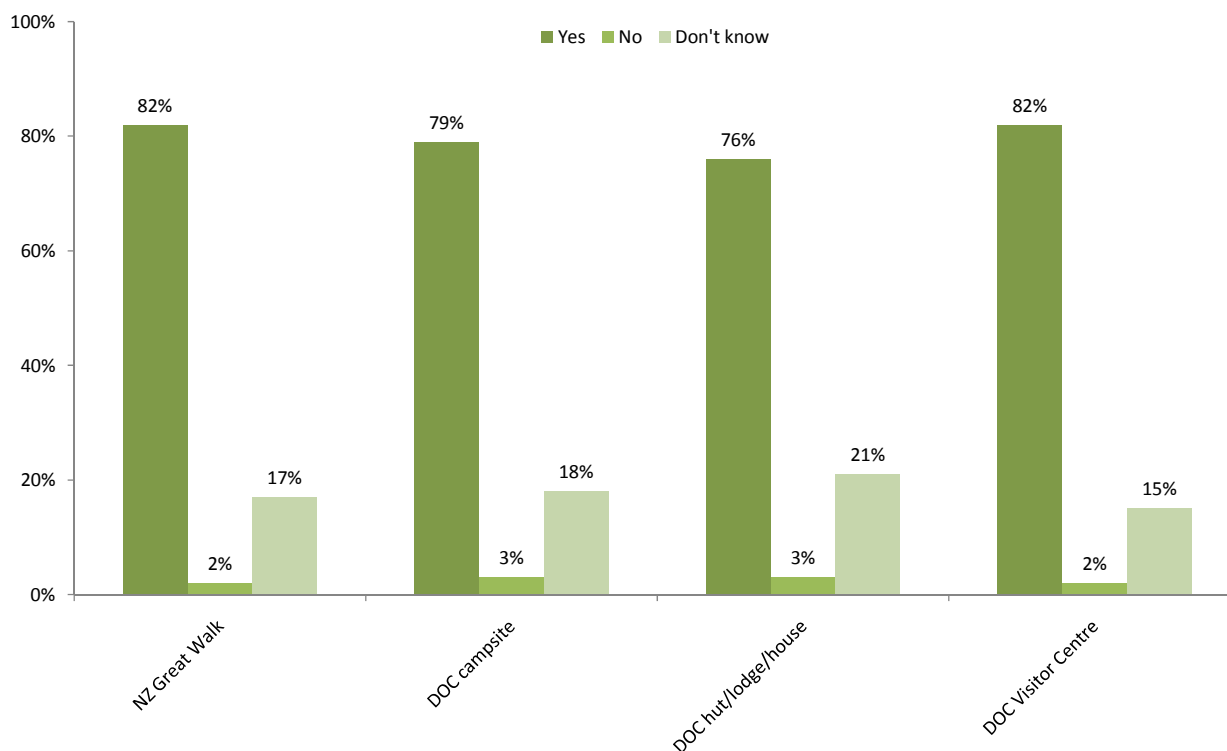
## 2.11 Information about facilities

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.

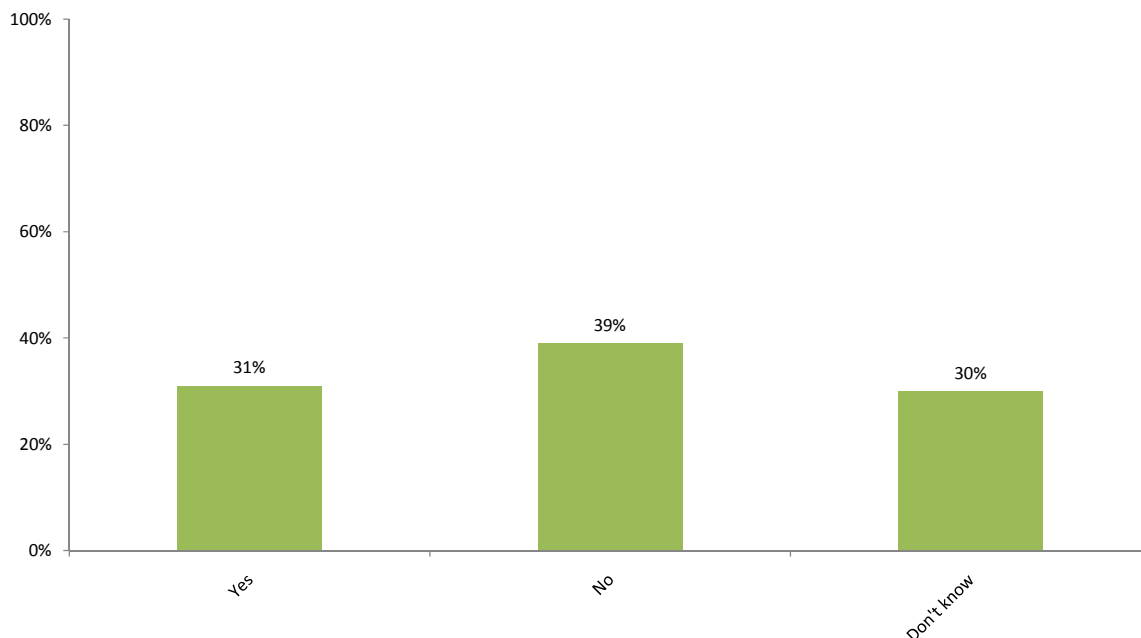
The following groups were statistically significantly more likely to **say they will** visit a DOC Gateway:

- 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.

### Likely to visit DOC Gateway in next 12 months



Base: all respondents 3614

### 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<sup>3</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 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.

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<sup>3</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**  
(unweighted numbers and weighted %)

<b>Gender</b>	<b>n=</b>	<b>%</b>	<b>Area</b>	<b>n=</b>	<b>%</b>
Male	1,678	48%	Northland	317	4%
Female	1,936	52%	Auckland	332	32%
<b>Age</b>			Waikato	314	9%
24 years or younger	405	12%	Bay of Plenty	337	7%
25-39 years	937	28%	Tongariro/Whanganui/Taranaki	323	8%
40-54 years	1,012	28%	Wellington/Hawke's Bay	351	16%
55 years plus	1,247	31%	Nelson/Marlborough	344	3%
Refused	13	1%	West Coast	270	1%
<b>Ethnicity (multiple response possible)</b>			Canterbury	341	13%
Pakeha	3,278	88%	Otago	347	5%
Maori	438	11%	Southland	325	2%
Pacific	79	3%	<b>Household income before tax</b>		
Asian	107	4%	\$40,000 or less	844	20%
Other	131	5%	\$40,001-\$60,001	637	16%
Refused	-	1%	\$60,001 or more	1,671	51%
<b>Location</b>			Refused/DK	462	12%
Big city	951	47%			
Small city/large town	1,322	27%			
Small town	905	16%			
Rural	425	9%			

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