

National Survey of New Zealanders – Visitor and historic sites report

Report prepared for: Department of Conservation

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Summary of findings

Visits to Department of Conservation (DOC) areas and National Parks have reduced in 2013 compared with 2012. In 2012 56% of the population had visited a DOC area in the past twelve months, this decreased to 48% in 2013. In 2012 26% of the population had visited a DOC National Park in the past twelve months, this decreased to 23% in 2012.

However, awareness that DOC provides recreation services has increased significantly from 2012 – from 77% aware in 2012 to 82% in 2013. With notable increases in knowledge that DOC provides parks and reserves, historic sites, and outdoor recreation opportunities.

Furthermore, there has been an increase in intention to use DOC services in the next three years (compared with 2012). In particular intention to use campsites and Great Walks in the next three years has increased, and there is also an increase in perception that these services are provided at a reasonable price.

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

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

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

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

Background and methodology

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

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

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

Estimated sampling errors

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

Table 2: Estimated sampling errors

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

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

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

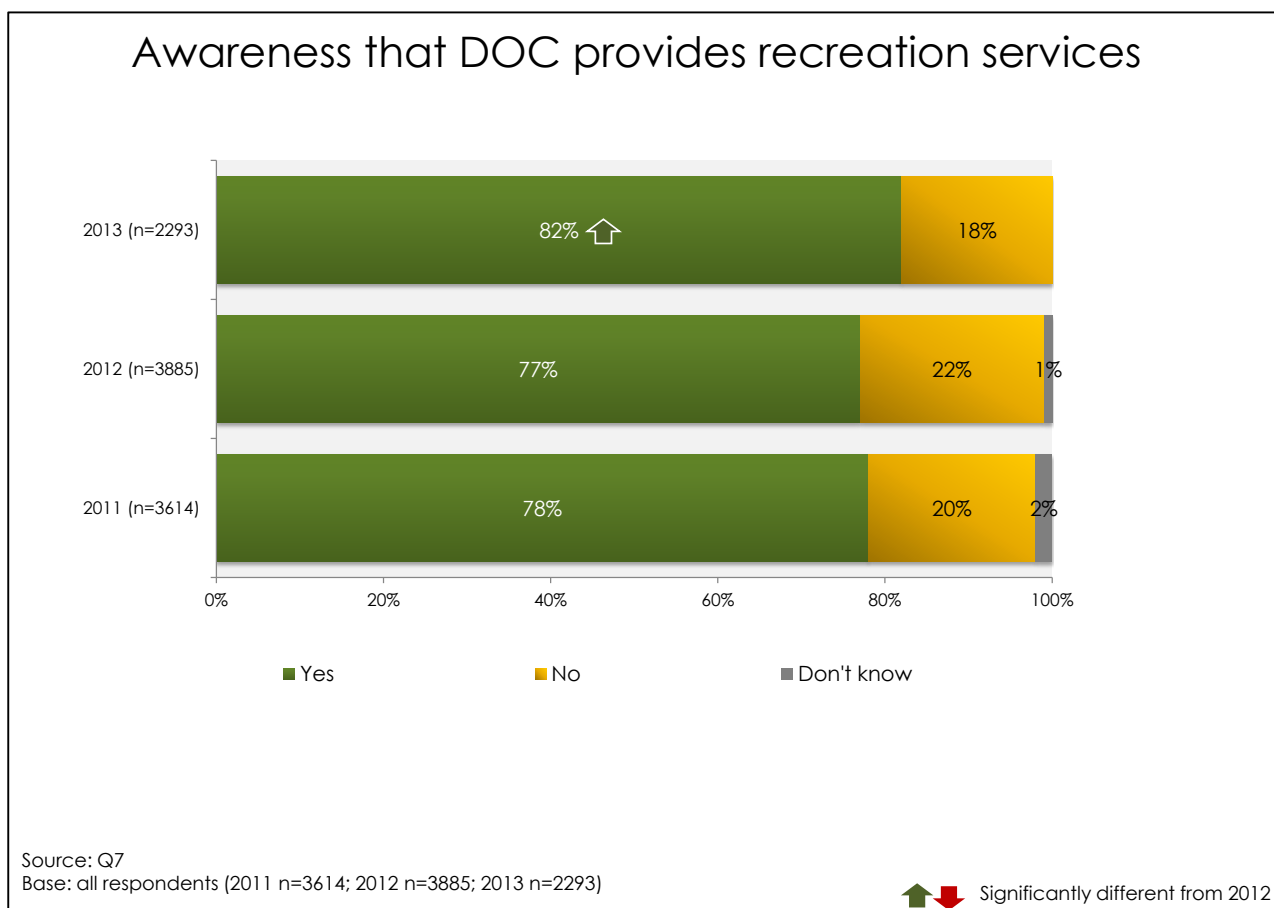
Further, all statistically significant changes between 2012 and 2013 are denoted with an arrow in the graphs. Where changes have occurred between 2012 and 2013 these are commented on in the report.

Detailed findings

Awareness of DOC recreation services

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

Figure 1: Awareness that DOC provides recreation services



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

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

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

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

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

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

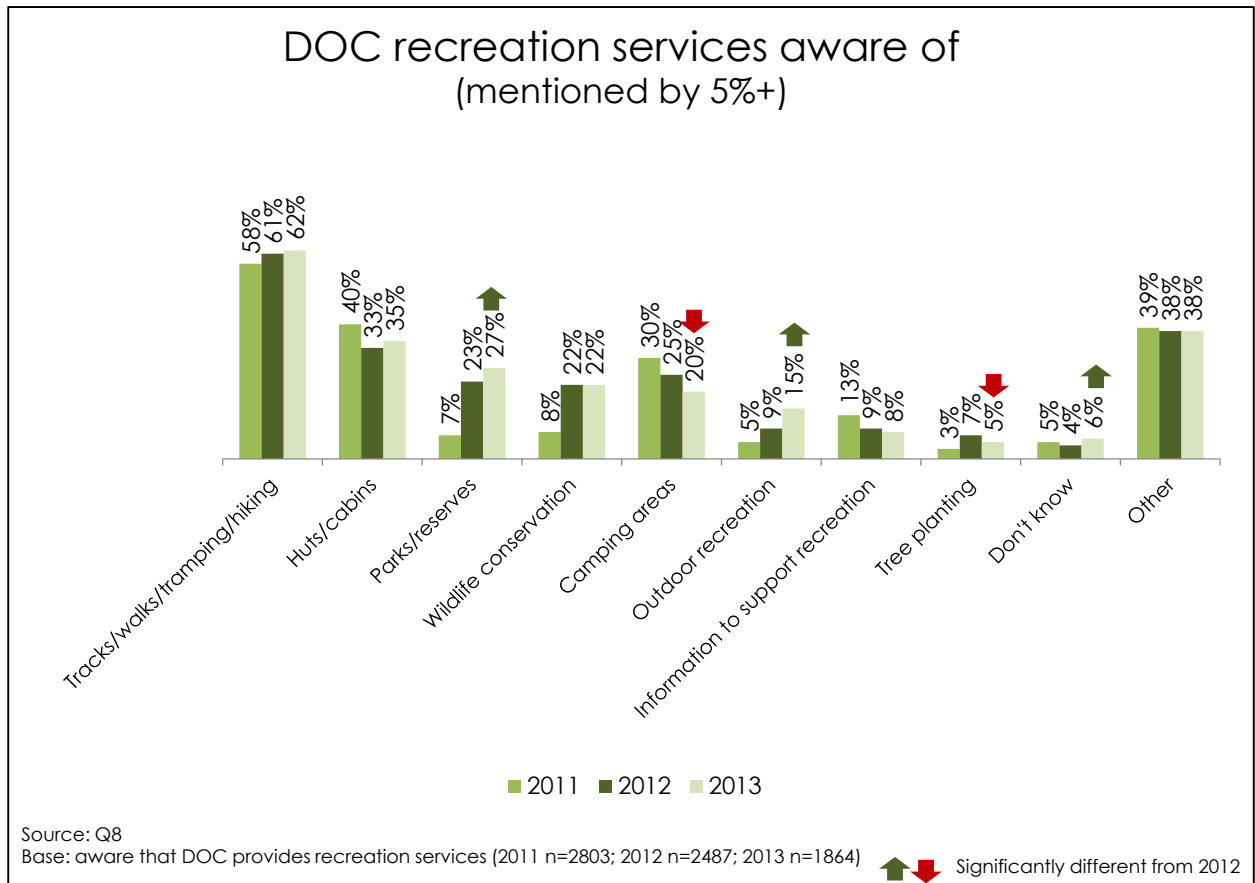
Table 1: Awareness that DOC provides recreation services by Conservancy

	2011 (n=3614)	2012 (n=3885)	2013 (n=2293)
Total	78%	77%	82%
Auckland	73%	73%	83%
Bay of Plenty	76%	73%	84%
Canterbury	82%	82%	82%
Nelson/ Marlborough	79%	81%	82%
Northland	76%	80%	85%
Otago	77%	84%	77%
Southland	77%	84%	80%
Tongariro, Whanganui, Taranaki	80%	79%	75%
Waikato	79%	74%	79%
Wellington	82%	80%	82%
West Coast	83%	80%	89%

Knowledge of DOC Services

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

Figure 2: DOC recreation services aware of



Walking and tramping tracks have the highest level of awareness, with over three in five (62%) of those aware of DOC services mentioning tracks. Awareness of DOC parks and reserves has increased significantly from 2012 (from 23% in 2012 to 27% currently), as has awareness of outdoor recreation (from 9% in 2012 to 15% in 2013).

Awareness of camping areas and tree planting has decreased since 2013. Awareness of camping areas has changed from 25% in 2012 to 20% in 2013, while awareness of tree planting has changed from 7% in 2012 to 5% in 2013.

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

Table 2: Significant differences in awareness of DOC recreations services

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

Visited DOC areas

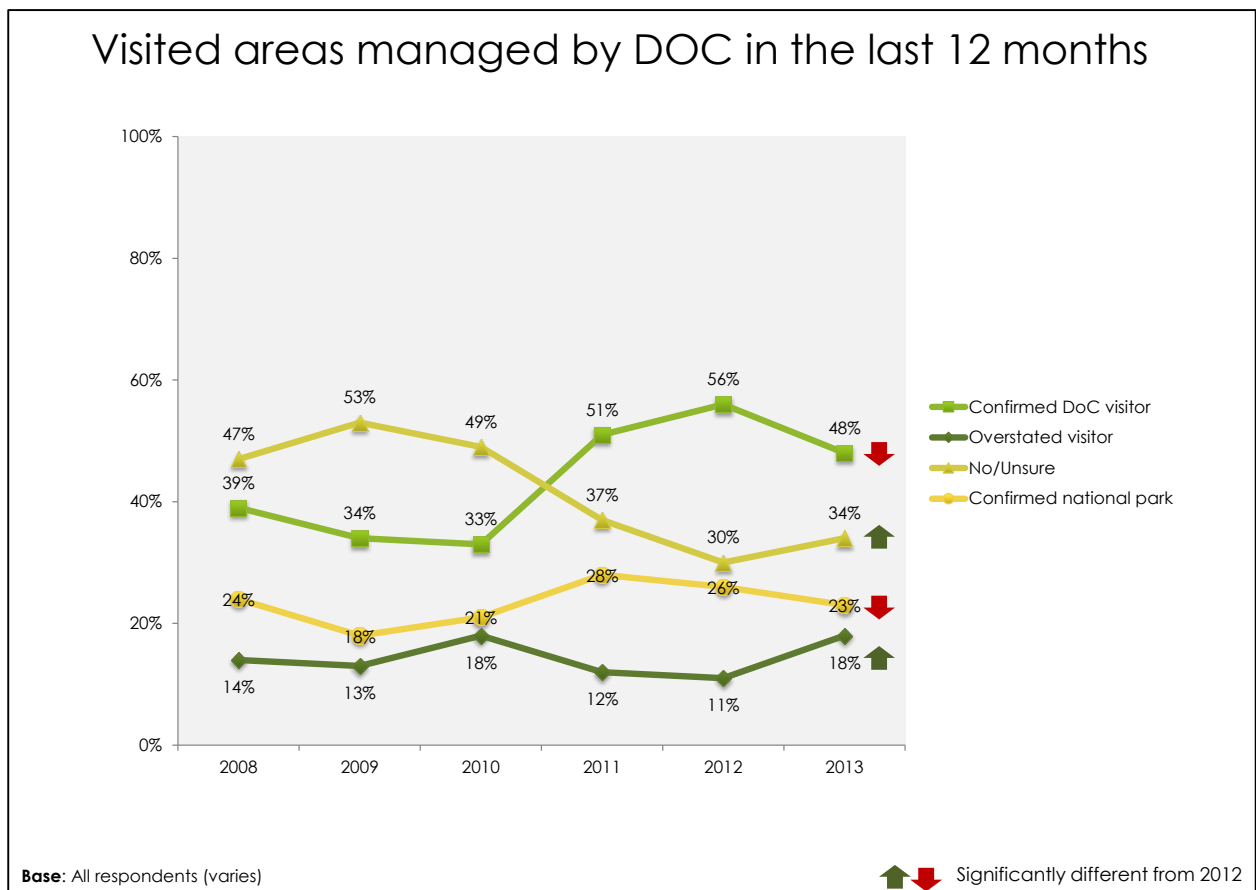
All respondents were asked whether they had visited any areas managed by the Department of Conservation in the last 12 months. Those who said yes were then asked to list both the area they had visited most recently, and any other areas they had also visited. Using these three questions, several measures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

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

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

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

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



The proportion of respondents who have visited a DOC area in the past twelve months ('confirmed DOC visitors') has decreased significantly from 2012 (from 56% in 2012 to 48% currently)

The proportion of respondents visiting a National Park in the past twelve months has also decreased (from 26% to 23%).

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

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

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

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

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

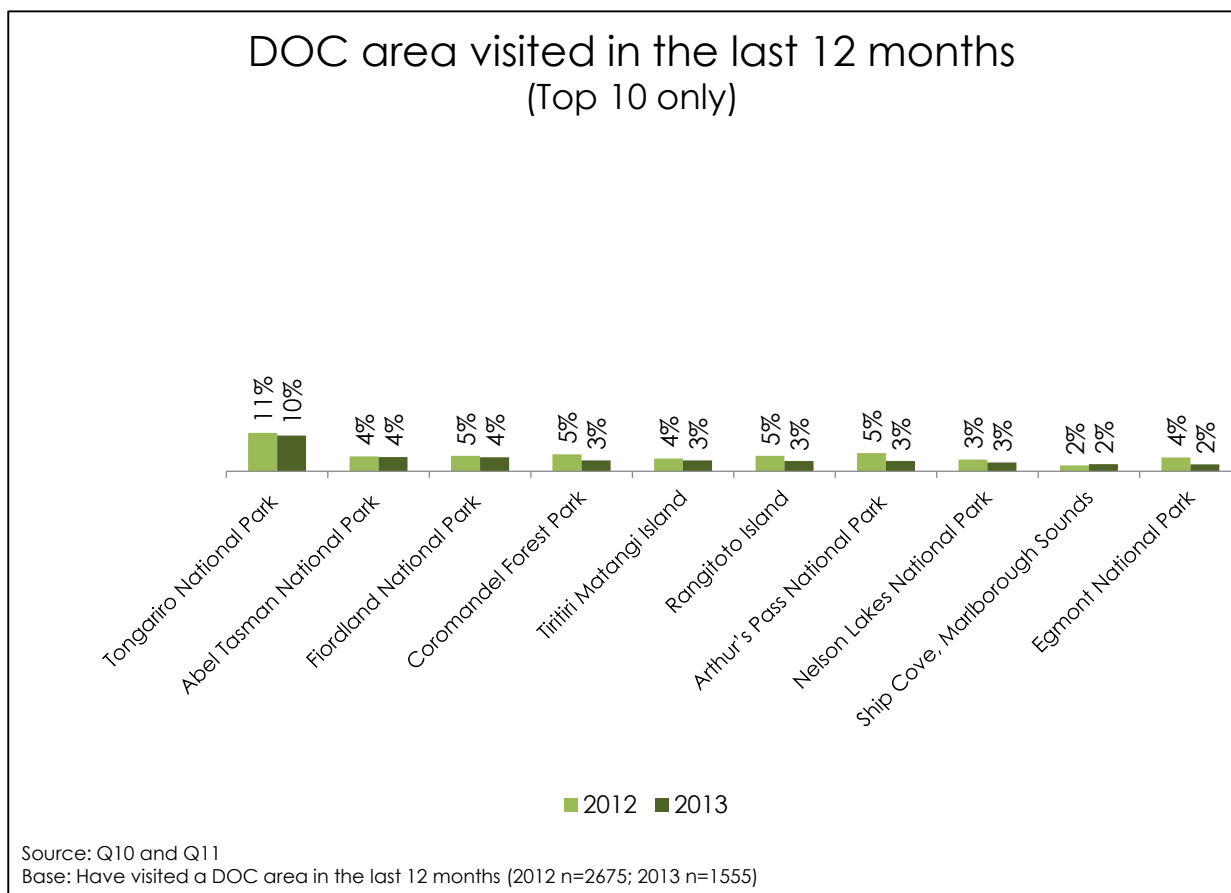
- Male (27%);
- Have a household income of \$60,001 or more per annum (29%);
- Live in a small town (29%);
- Live in the Canterbury Conservancy (32%), Nelson/Marlborough Conservancy (55%), Southland Conservancy (36%), Tongariro/Whanganui/Taranaki Conservancy (58%), or West Coast Conservancy (49%).

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

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

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

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



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

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

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

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

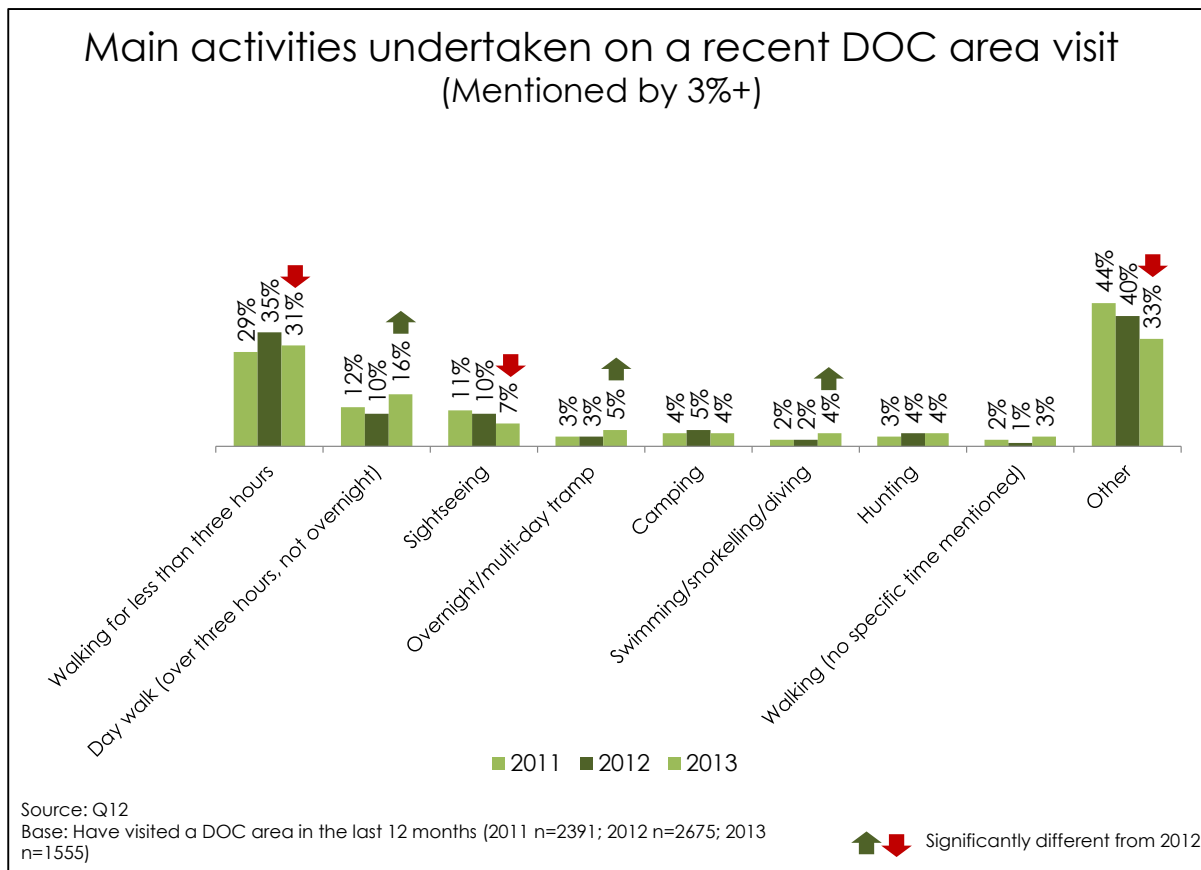
Northland		Otago		Southland		Tongariro, Whanganui, Taranaki	
Unweighted total	117	Unweighted total	121	Unweighted total	159	Unweighted total	120
Waipoua – Tane Mahuta Big Tree	13%	Fiordland National Park	18%	Fiordland National Park	35%	Egmont National Park	37%
Kerikeri basin – stone store	10%	Mt Aspiring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

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

Activities undertaken on recent visit to a DOC area

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

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



Almost one third (31%) engaged in a short walk of less than three hours, and a further 16% engaged in a day walk over three hours but not overnight. Comparing 2012 to 2013, the proportion mentioning short walks has decreased (from 35% in 2012 to 31% in 2013), while the proportion mentioning day walks has increased (from 10% to 16%).

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

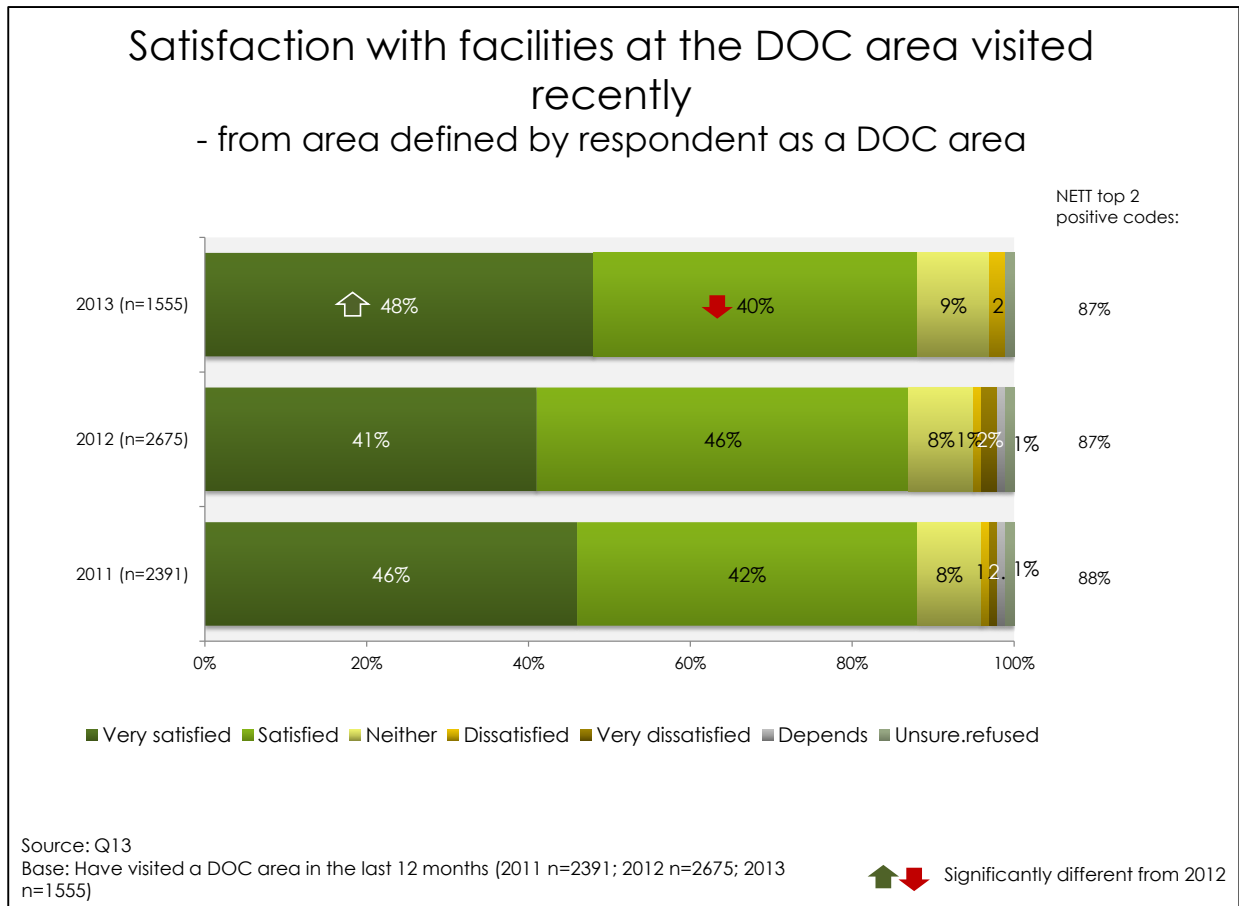
Table 4: Significant differences in activities undertaken at DOC areas

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

Satisfaction with facilities at DOC areas

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

Figure 6: Satisfaction with facilities at DOC areas visited



As shown, the proportion rating 'very satisfied' has increased significantly in 2013 – from 41% in 2012 to 48% in 2013. However, the overall proportion that are either 'satisfied' or 'very satisfied' (combined) remains the same (at 87%).

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

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

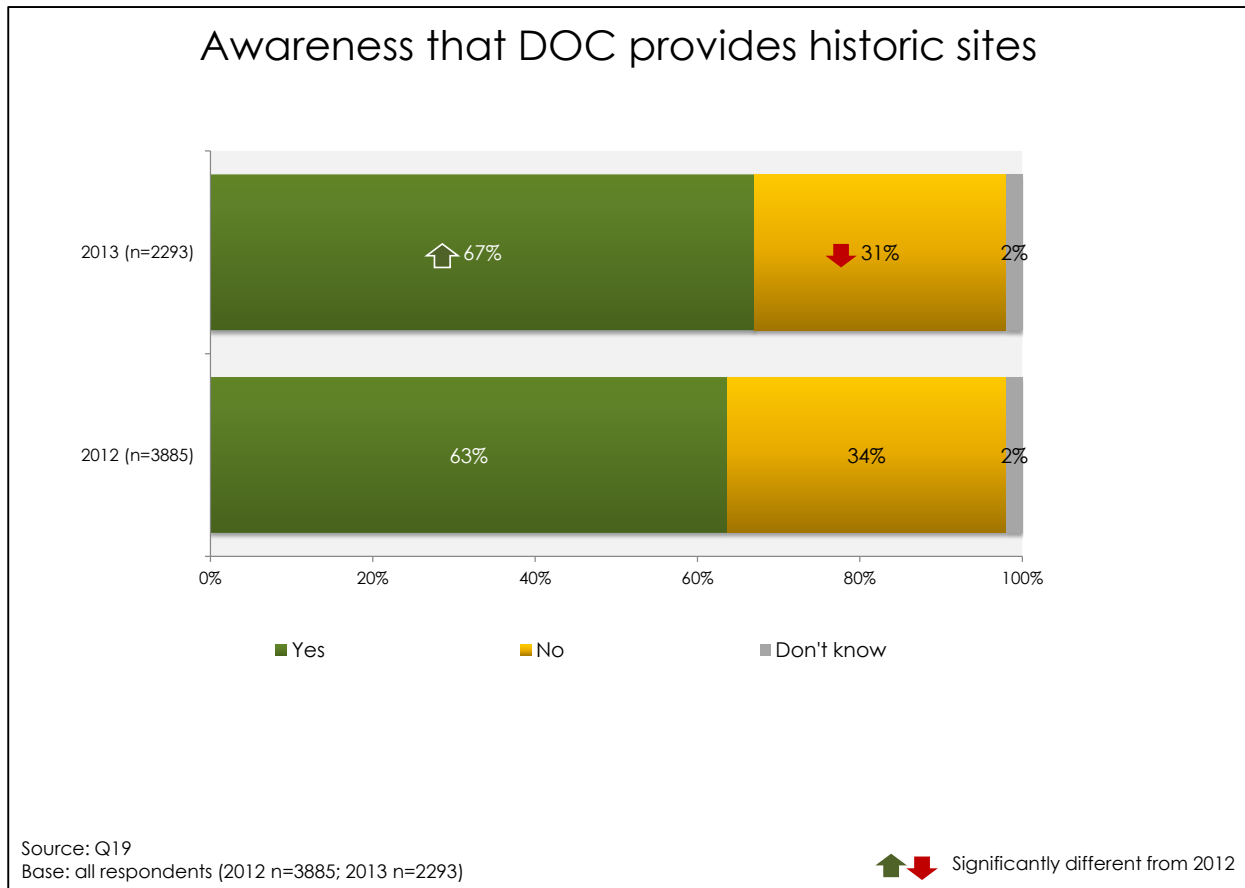
Overall proportion either 'very satisfied' or 'satisfied'	Type of activity (note some activities are combined)								
	Total	Day walk or dog-walk	Overnight/multi-day tramp	Picnics, sightseeing and family outings	Hunting or duck shooting	Fishing	Mountain biking	Camping	Swimming/diving/s norkelling
2013 base size	1555	807	73	183	87	47	39	72	41
2013 %	87%	91%	93%	87%	64%	79%	92%	89%	87%
2012 base size	2675	1242	86	552	58	94	58	126	45
2012 %	87%	88%	98%	84%	80%	79%	91%	91%	76%
2011 base size	2391	1082	91	470	104	84	42	107	30
2011 %	88%	89%	94%	90%	80%	79%	67%	97%	97%

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

Awareness of DOC historic sites

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

Figure 7: Awareness that DOC provides historic sites



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

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

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

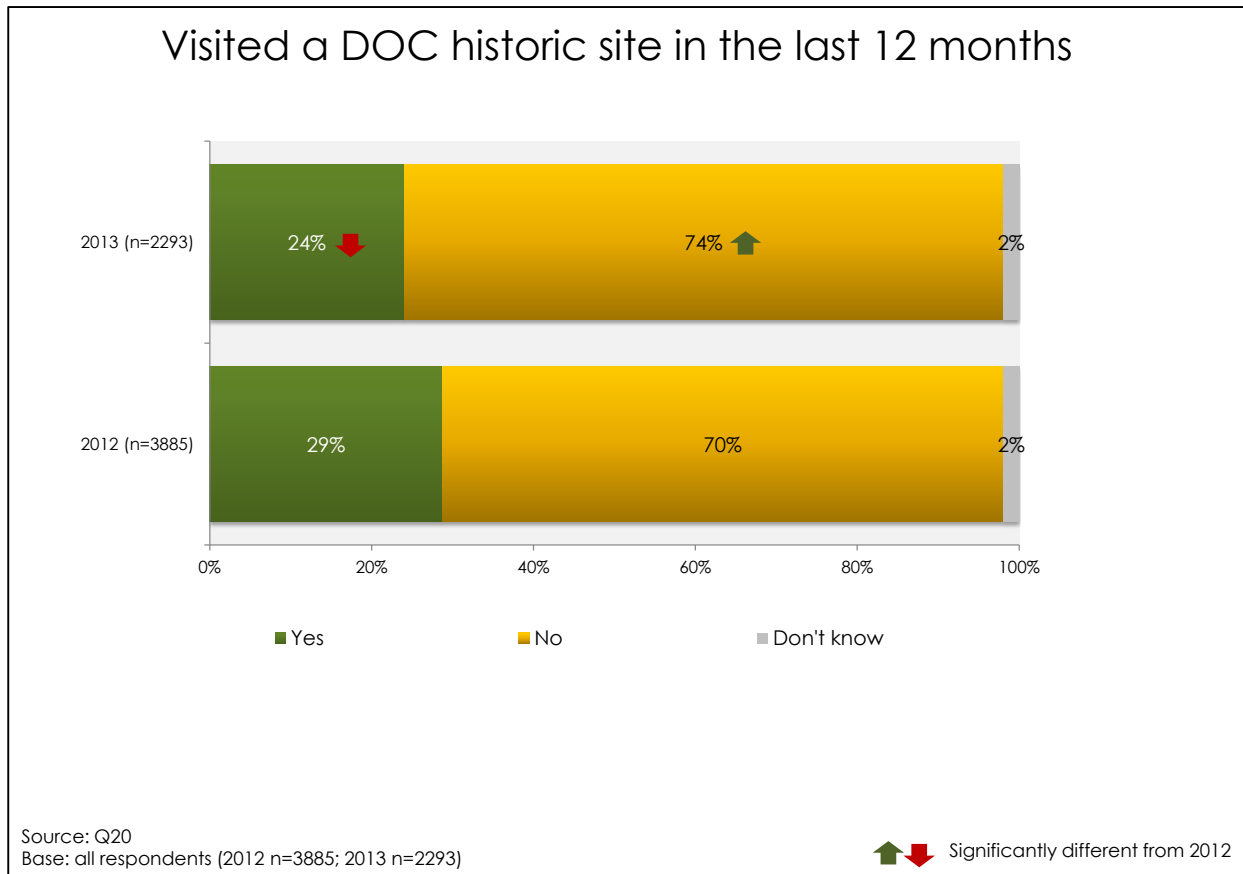
Those who are significantly more likely than average (31%) to say they are not aware that DOC provides historic sites include:

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

Visited a DOC historic site

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

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



The proportion who have visited a DOC historic site in the last 12 months has decreased from 29% to 24%.

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

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

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

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

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

Figure 9: Historic sites visited in the last 12 months

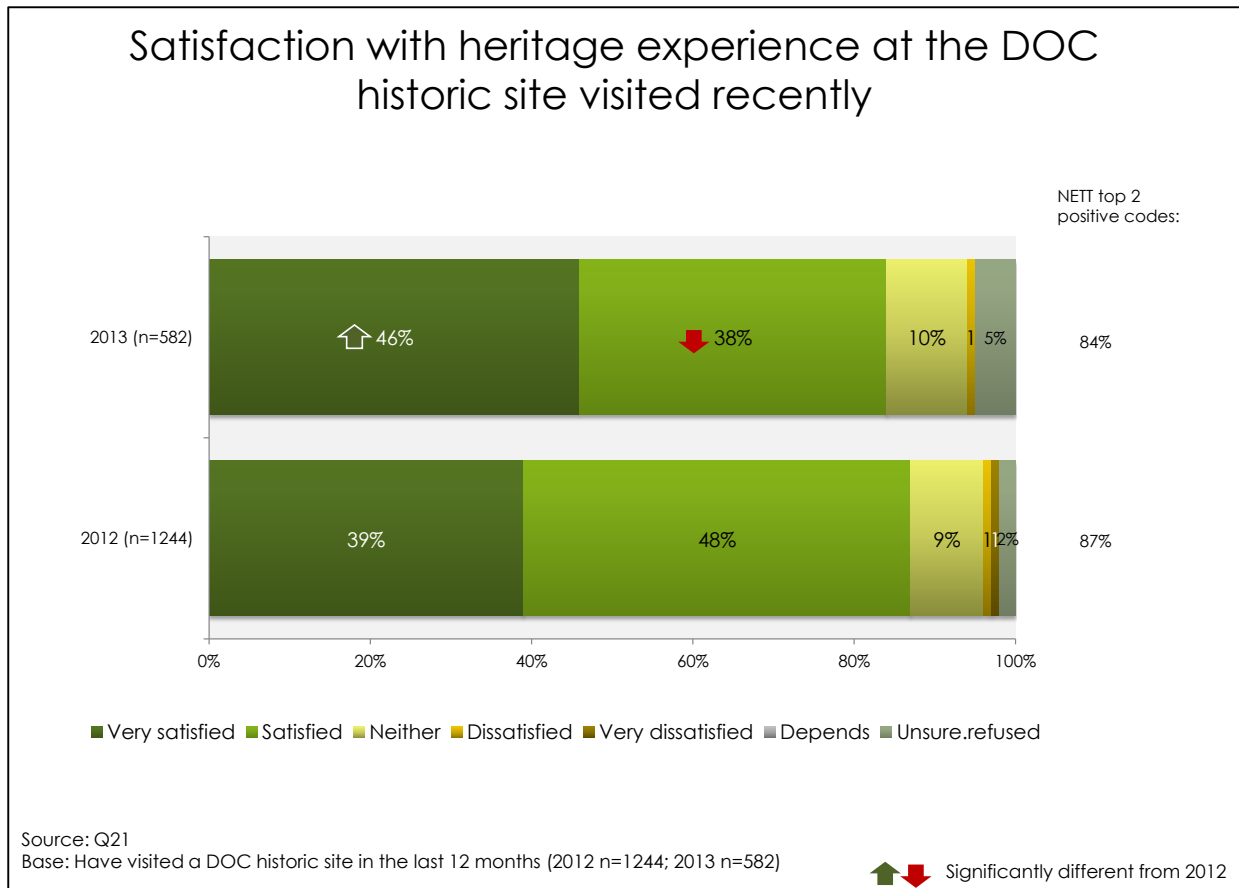


Of those who have visited a historic site, the Otago Central Rail Trail and Cape Reinga are the sites most likely to be mentioned (by 16% and 15% respectively).

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

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

Figure 10: Satisfaction with heritage experience at historic sites

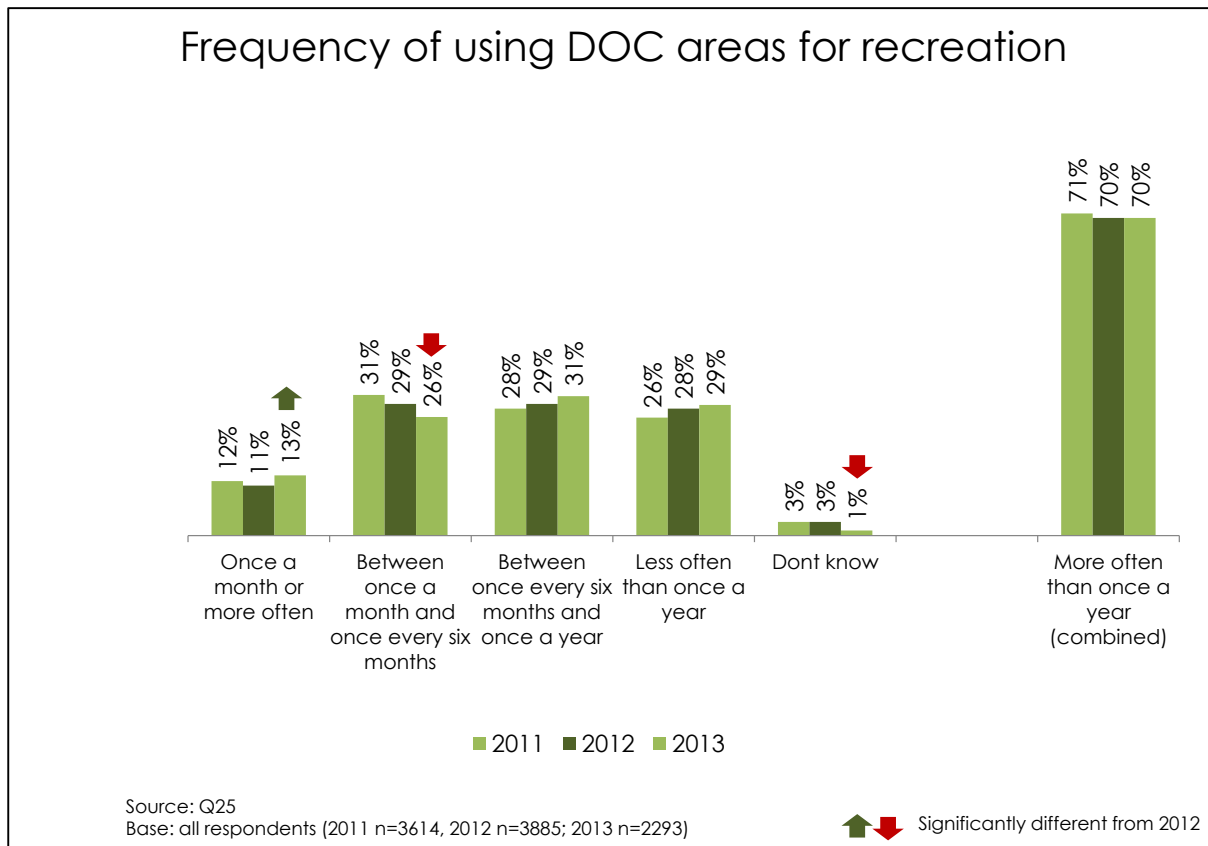


As shown – the proportion saying ‘very satisfied’ has increased significantly from 2012 to 2013 (from 39% in 2012 to 46% in 2013). There has been no statistically significant change in the combined proportion that are either ‘very satisfied’ or ‘satisfied’ (the ‘top two’ most positive codes on the response scale).

Frequency of using DOC areas for recreation

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

Figure 11: Frequency of using DOC areas for recreation



Although there has been some movement in the proportion of respondents in the '1 month – 6 months' and '6 months to 1 year' category between 2012 and 2013, overall there has been minimal change in the proportion that use DOC areas for recreation at least once every six months (40% in 2012 and 39% in 2013) or at least once every year (70% in 2012 and 2013).

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

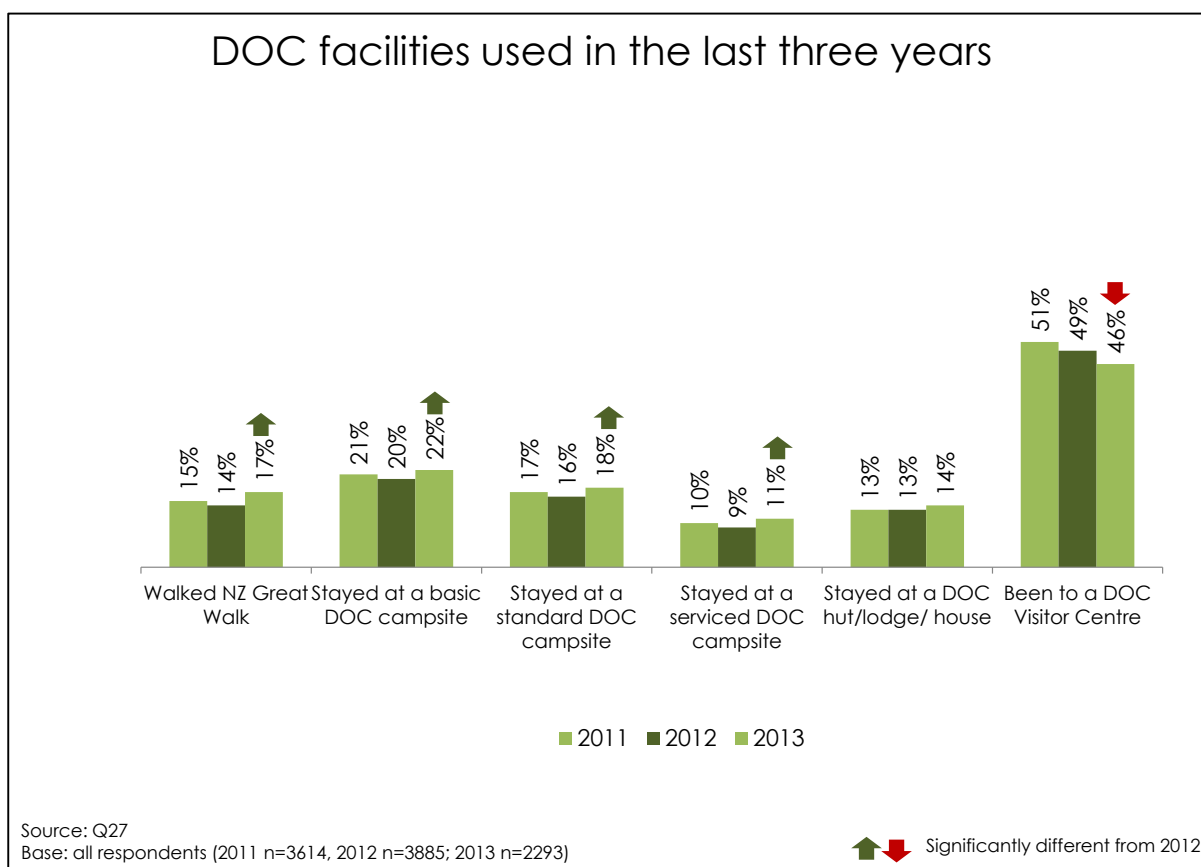
Table 6: Significant difference in frequency of using DOC areas

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

DOC facilities used in the last three years

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

Figure 12: DOC facilities used in the last three years



The proportion saying they have walked a Great Walk or stayed at any type of DOC campsite in the last three years has increased significantly from 2012. By contrast, the proportion saying they have been to a DOC Visitor Centre has decreased (from 49% in 2012 to 46% in 2013).

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

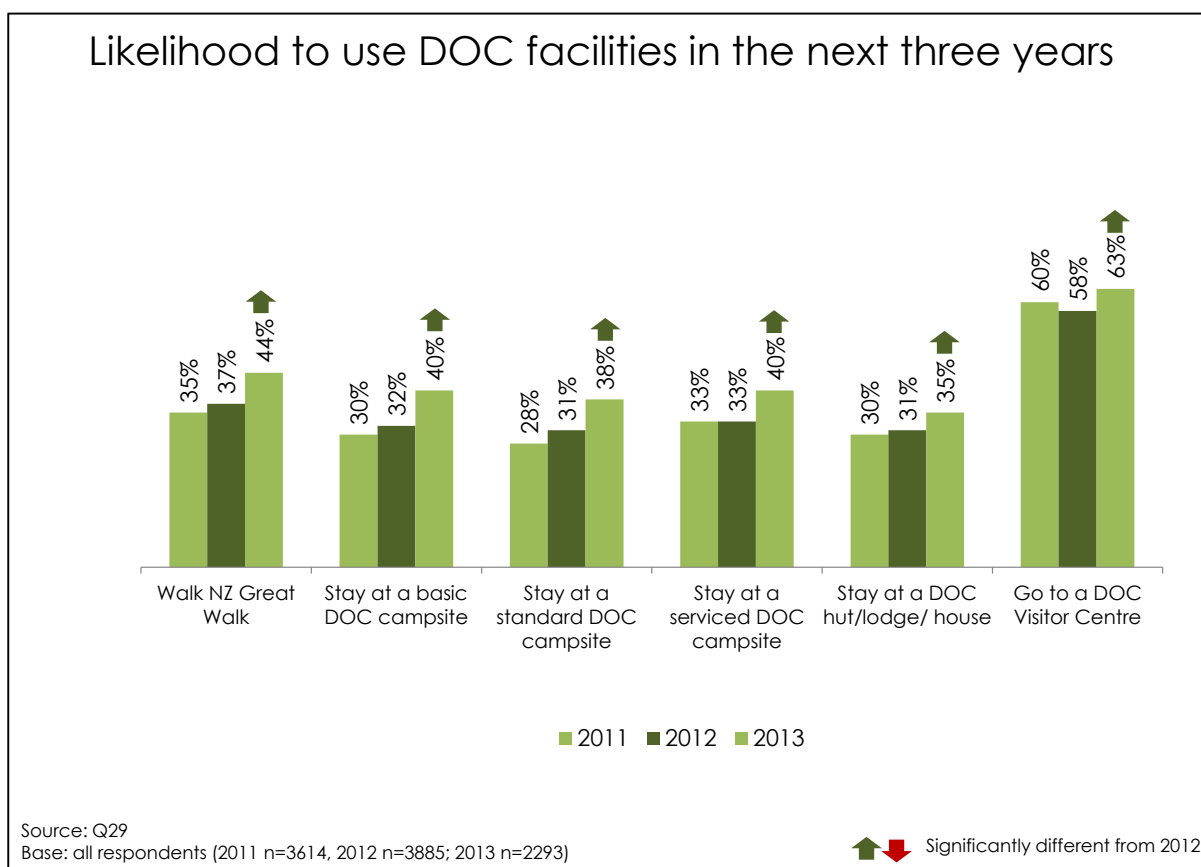
Table 7: Significant differences in DOC facilities used in the last three years

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

Likelihood to use DOC facilities in the next three years

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

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



Intention to engage in or use each activity/facility has increased significantly from 2012 to 2013. Intention to do a Great Walk in the next three years has increased from 37% to 44%, intention to stay at a basic DOC campsite in the next three years has increased from 32% to 40%, intention to stay at a DOC standard campsite in the next three years has increased from 31% to 38%, and intention to stay at a DOC serviced campsite in the next three years has increased from 33% to 40%. Intention to stay at a DOC hut or lodge in the next three years has increased from 31% to 35% and intention to go to a DOC Visitor Centre in the next three years has increased from 58% to 36%.

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

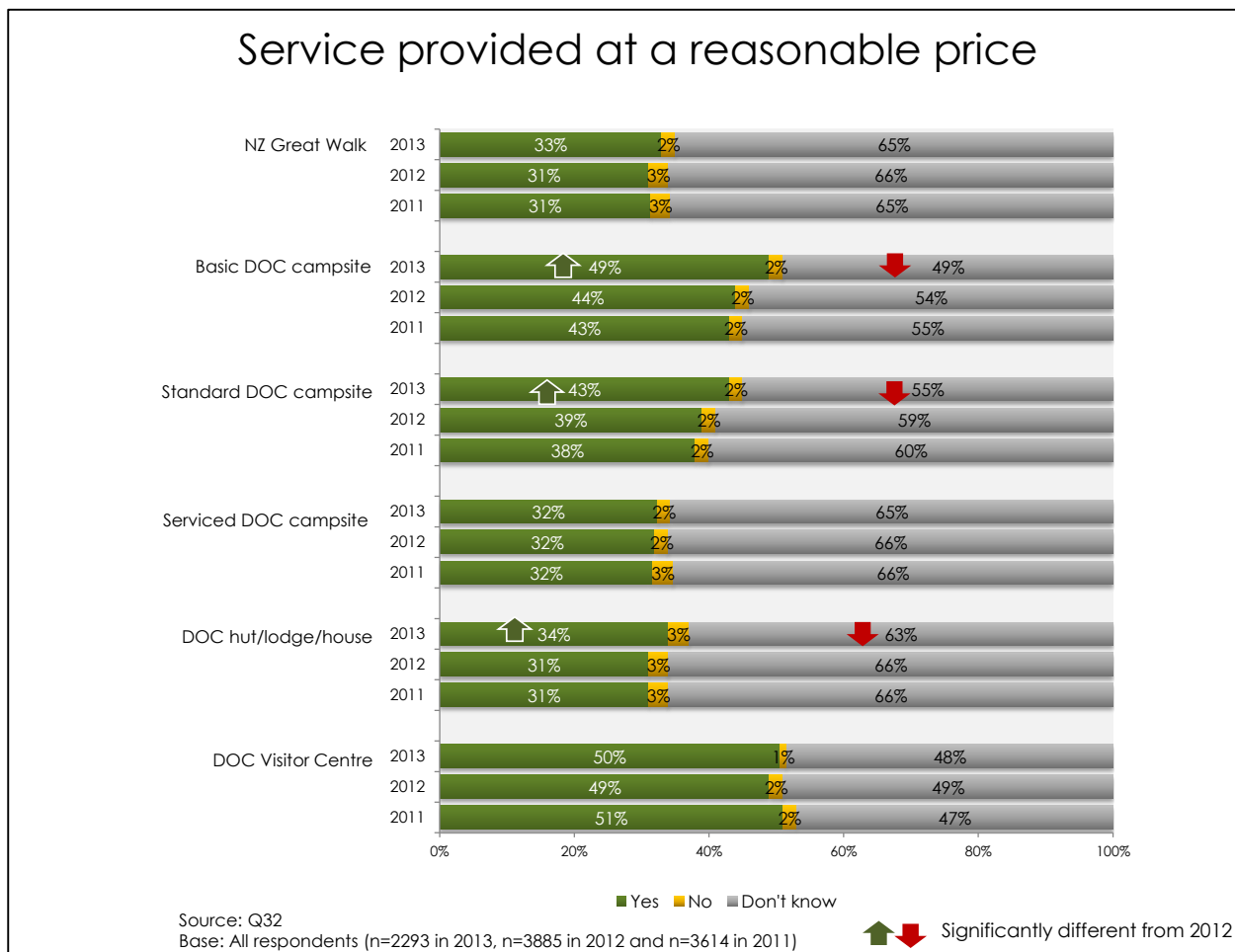
Table 8: Significant differences in likelihood to visit DOC areas in the next three years

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

Perceptions about the price of DOC services being reasonable

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

Figure 14: Perception of services provided at a reasonable price



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

In 2013 there has been a significant increase in the proportion saying that each of basic DOC campsite, standard DOC campsite, and DOC hut/lodge are provided at a reasonable price.

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

Table 9: Significant differences in perception of reasonable price

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

Appendix 1: Total Sample Profile

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

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

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

Table 5: Profile of total sample

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

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

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