

New Zealanders in the outdoors

Domestic customer segmentation research

Department of Conservation

March 2020

Crown copyright March 2020

New Zealand Department of Conservation

This work is licensed under the Creative Commons Attribution 4.0 International license. In essence, you are free to copy, distribute and adapt the work, as long as you attribute the work to the Crown and abide by the other licence terms. To view a copy of this licence, www.creativecommons.org/licenses/by/4.0.

In the interest of forest conservation, we support paperless electronic publishing.

Contents

Contents.....	3
Background.....	7
Research approach.....	7
Key findings	8
1 Participation in outdoor activities	10
1.1 Activities undertaken by New Zealanders	10
1.2 Aucklanders in the outdoors.....	11
1.2.1 Aucklanders' participation in outdoor activities	12
1.2.2 What Aucklanders said	13
1.3 Cantabrians and Otago residents in the outdoors	14
1.3.1 Cantabrians' participation in outdoor activities.....	14
1.3.2 Otago residents' participation in outdoor activities.....	16
1.3.3 What Christchurch and Queenstown residents said	17
1.4 Companions in the outdoors.....	18
1.5 Influence of seasons.....	19
1.6 Willingness to travel.....	19
2 Needs and motivations	20
2.1 Benefits of outdoor experiences.....	20
2.2 Needs and motivations of different customer segments	21
2.2.1 Customer segments.....	22
2.2.2 Quantitative confirmation of segments	24
2.2.3 Customer segment sizes and descriptions.....	24
2.2.4 Common characteristics among segments.....	26
2.2.5 What people said.....	28
2.3 Delving deeper into the segments.....	29
2.3.1 Mindful Actives.....	29
2.3.2 Social Actives.....	31
2.3.3 Enthusiastic Actives.....	32
2.3.4 Stimulation Actives	34

2.3.5	Home-Close Actives.....	35
2.3.6	Other Things Actives	36
3	Cultural perspectives.....	39
3.1	Māori perspective	39
3.1.1	Māori participation in outdoor activities.....	39
3.1.2	What Māori said.....	40
3.2	New migrant perspective.....	41
3.2.1	New migrant participation in outdoor activities	41
3.2.2	What new migrants said	43
4	Considerations and concerns.....	44
4.1	Decision-making	44
4.1.1	Important considerations when choosing where to visit	44
4.1.2	Decision-making by life stage.....	45
4.1.3	Decision-making by segment.....	46
4.1.4	Deeper insights into decision-making	46
4.2	Barriers to engaging in outdoor activities.....	49
4.3	Improving the outdoors.....	51
5	Safety in the outdoors	52
5.1	What safety and risk look like.....	53
6	Life stages and abilities.....	55
6.1	Younger age groups	55
6.1.1	Key qualitative highlights - younger people	55
6.1.2	Key quantitative highlights - under 30s	55
6.2	Younger families	56
6.2.1	Key qualitative highlights	56
6.2.2	Key quantitative highlights	57
6.3	Older people.....	57
6.3.1	Key qualitative highlights	57
6.3.2	Key quantitative highlights	58
6.4	Impairments.....	59
6.5	Implications of these differences for conservation.....	58
7	Cultural or historic heritage sites.....	60

7.1	Heritage participation.....	60
7.2	Cultural or historic heritage perceptions	61
7.3	A latent opportunity	62
8	Participation in walks	64
8.1	Short walks (< 3 hours) were popular.....	64
8.1.1	Overall short walks participation.....	64
8.1.2	Short walks by customer segment.....	64
8.1.3	Short walks by region	64
8.1.4	What people said.....	65
8.2	Day walks (> 3 hours but not overnight) were also popular	66
8.2.1	Overall day walk participation	66
8.2.2	Day walks participation by segment	66
8.2.3	Day walks participation by region	66
8.2.4	What people said.....	67
8.3	Multi-day walks (overnight).....	68
8.3.1	Multi-day walks participation	68
8.3.2	Multi-day walks participation by segment	68
8.3.3	Multi-day walks participation by region	68
8.3.4	What people said.....	69
Appendix 1	71
	Regional snapshots	71
A1.1	Northland / Te Tai Tokerau.....	72
A1.2	Auckland / Tāmaki Makaurau	73
A1.3	Waikato.....	74
A1.4	Bay of Plenty / Te Moana a Toi.....	75
A1.5	Gisborne / Te Tai Rāwhiti.....	76
A1.6	Hawke’s Bay / Te Matau-a-Māui.....	77
A1.7	Taranaki	78
A1.8	Manawatū-Whanganui.....	79
A1.9	Wellington / Te Whanganui a Tara	80
A1.10	Tasman / Te Tai o Aorere	81
A1.11	Nelson / Whakatū	82

A1.12	Marlborough / Te Tau Ihu o Te Waka a Māui	83
A1.13	West Coast / Te Tai Poutini	84
A1.14	Canterbury / Waitaha	85
A1.15	Otago / Ōtākou	86
A1.16	Southland / Murihiku.....	87

Background

This document provides a snapshot of New Zealanders' experiences in the outdoors. It is a summary of findings from customer research undertaken by the New Zealand-based customer research and evaluation agency UMR from September 2018 to February 2020.

The research results provide insights into how New Zealanders participate in outdoor activities and will help improve the Department of Conservation's (DOC's) understanding of its 'customers' or those who use (or could potentially use) public conservation land and waters.

It should be noted that these results apply to a pre-COVID-19 context.

Research approach

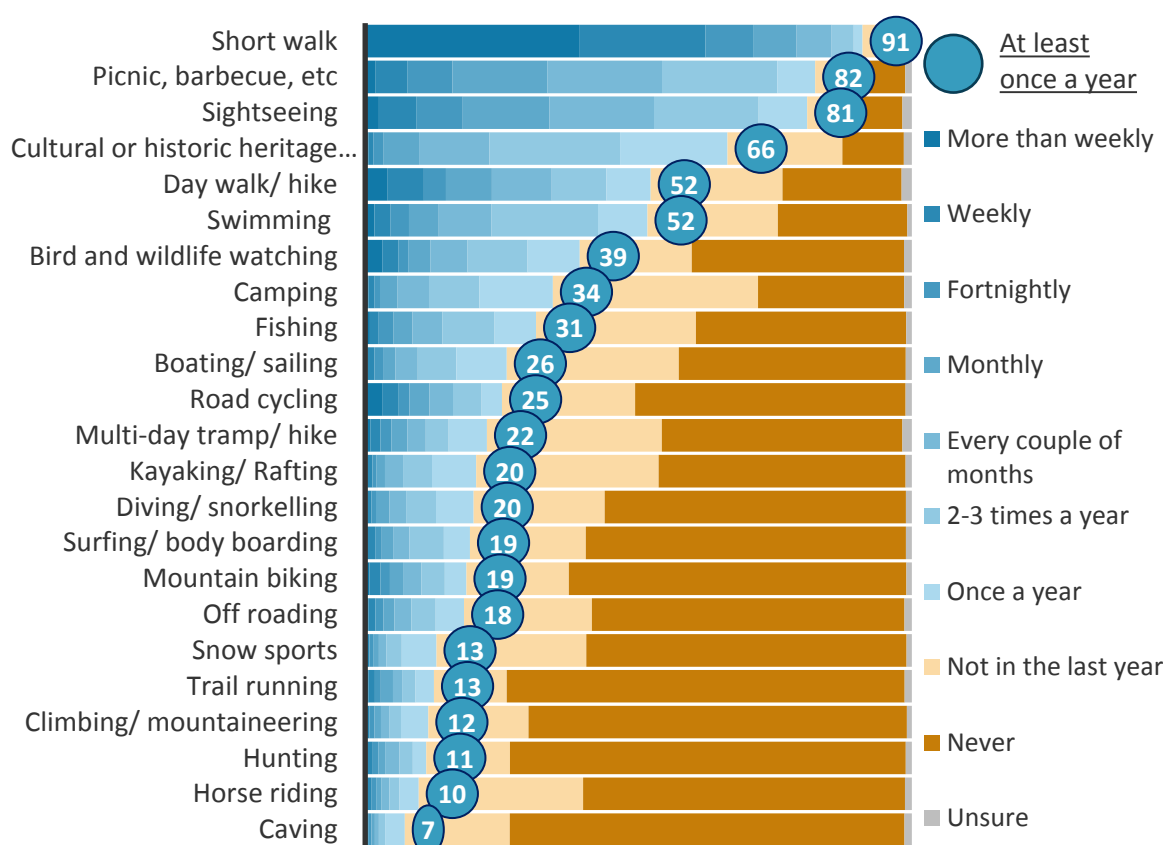
The research conducted by UMR focused solely on domestic customers (ie New Zealanders). The primary aim of this research was to give DOC a better understanding of differences in the needs, motivations, attitudes and behaviours of different customer segments when interacting in the New Zealand outdoors.

There were three phases of research.

1. **Qualitative focus groups ($n = 58$):** Eight focus groups were carried out from September to October 2018 in Auckland (4), Christchurch (3) and Queenstown (1).
2. **Quantitative survey ($n = 3,837$):** A quantitative survey was undertaken from May to June 2019 with an online panel of New Zealanders aged 18+ years. Quota sampling was weighted to be nationally (including regionally) representative.
3. **Segmentation analysis with ethnography:**
 - a) Segmentation analysis was developed using the results of the qualitative and quantitative phases with input from DOC to ensure a robust analysis and useful output to guide its internal work.
 - b) Ethnographic journals and interviews ($n = 12$ plus an additional 3 to improve output) were undertaken from October 2019 to February 2020. These represented each of the six key customer segments identified.

Key findings

- The customer segmentation identified key needs and motivations for New Zealanders' participation in outdoor activities. Six key segments were distinguished from the qualitative work, four of which were identified as being more active from the quantitative data - Mindful Actives (21%), Social Actives (21%), Enthusiastic Actives (14%) and Stimulation Actives (11%). Among the less active segments, Home-Close Actives (13%) required outdoor places that were easier to access, especially for those with mobility issues, and Other Things Actives (20%) had limited engagement with the outdoors, preferring to do other things.
- Leisure activities were very popular in the past year, as illustrated below. The most popular activities were short walks (91%), picnics/barbecues (82%) and sightseeing (81%), followed by cultural and historic heritage sites (66%), day walks (52%) and swimming (52%). There appears to be considerable scope for more leisure opportunities to be developed in the New Zealand outdoors.



Percentage of responses to Q1a: 'In the last year or so, approximately how often have you taken part in the following activities in New Zealand's outdoors?' (n = 3,837).

- Of all New Zealanders surveyed, 66% said they had visited a cultural or historic heritage site in the past year, making this the fourth highest outdoor activity. There was especially strong interest in this activity amongst younger and older educated people and new migrants. Research comments suggested that good signage information and telling compelling stories at sites would improve the visitor experience at site.

- There appears to be a gap in engaging urban dwellers in outdoor activities – especially ‘walking in nature’ activities. New migrants in particular seemed to be less confident in the outdoors. Education campaigns on being prepared when active in the outdoors could make a substantial difference in encouraging more diverse New Zealanders into the outdoors.
- Some Māori expressed a more holistic and multi-dimensional relationship with the outdoors, with a commitment to protecting and restoring the outdoors for future generations. There is an opportunity to work in partnership with iwi and hapū to develop experiences and products that reflect this Māori commitment to protecting and restoring New Zealand’s natural environment and biodiversity.

1 Participation in outdoor activities

1.1 Activities undertaken by New Zealanders

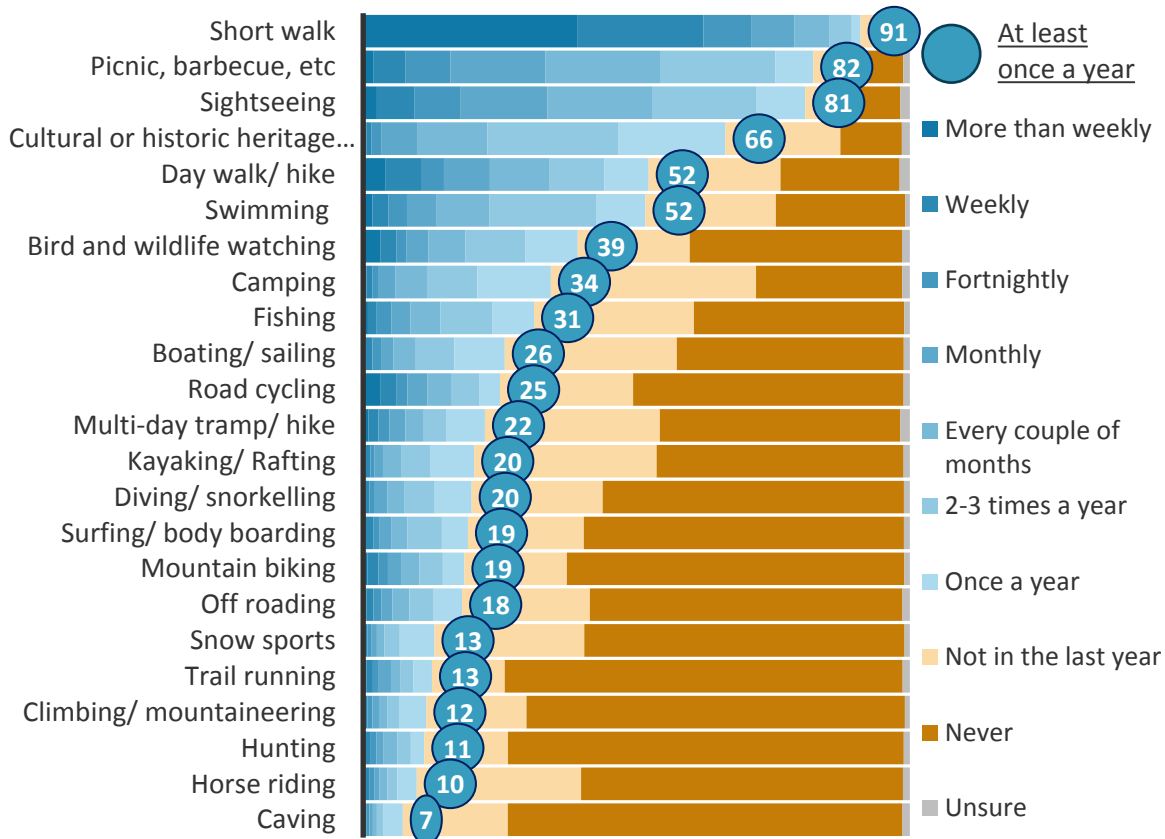


Figure 1. Percentage of responses to Q1a: ‘In the last year or so, approximately how often have you taken part in the following activities in New Zealand’s outdoors?’ (n = 3,837).

The frequency of New Zealanders’ participation in outdoor activities in the last year across the entire country was investigated (Figure 1). Note that this did not solely focus on public conservation land and waters – these activities could have been undertaken anywhere in the outdoors, from back gardens to neighbourhood reserves to local parks through to the ‘great outdoors’.

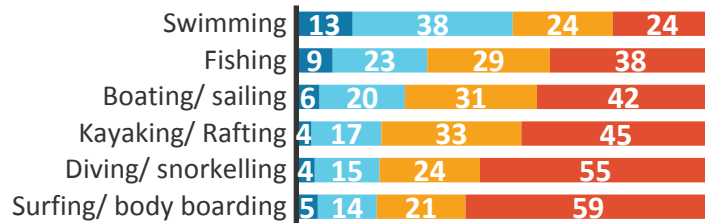
This analysis showed that more leisurely and accessible activities (ie short walks, sightseeing, picnics/barbecues) were more popular and more regularly undertaken than challenging and remote activities. Among these, short walks, which are defined as walks of < 3 hours, were the most common and frequent outdoor activity, with 79% of New Zealanders participating in these at least monthly.

There were also strong associations between short and day walks (defined as walks > 3 hours but not overnight) and sightseeing, and between picnics/barbecues and short walks, indicating that those who undertook short and day walks also often participated in sightseeing activities or picnics/barbecues.

The data also showed several trends in terms of particular groups.

- Younger people were more likely than other age groups to take part in most outdoor activities at least monthly.

- Māori (41%) and young families (48%) were more likely than the rest of the population to picnic/barbecue regularly, while Asians (42%) were more likely to go sightseeing.
- A low proportion of New Zealanders participated regularly in water-related activities (Figure 2), which was unexpected for an island nation, but participation in these activities more frequently occurred in northern areas of New Zealand and by Māori and Pasifika.



■ Monthly or more ■ At least once a year ■ Not in the last year ■ Never ■ Unsure

Figure 2. Proportion of New Zealanders who participated in water-related activities (n = 3,837).

- Note, regional snapshots of New Zealanders participation in the outdoors can be found in Appendix 1.

1.2 Aucklanders in the outdoors

Note: The information in this section combines the qualitative findings from four focus groups and ethnographic interviews in Auckland with data from the quantitative survey.

According to the New Zealand census, there were 3.59 million New Zealanders (76% of the population) living in the North Island in 2018, 1.57 million of whom (33% of the population) lived in the greater Auckland region.

1.2.1 Aucklanders' participation in outdoor activities

Aucklanders participated in a wide range of outdoor activities, as shown in Figure 3. It should be noted that these activities may or may not have been undertaken in Auckland.

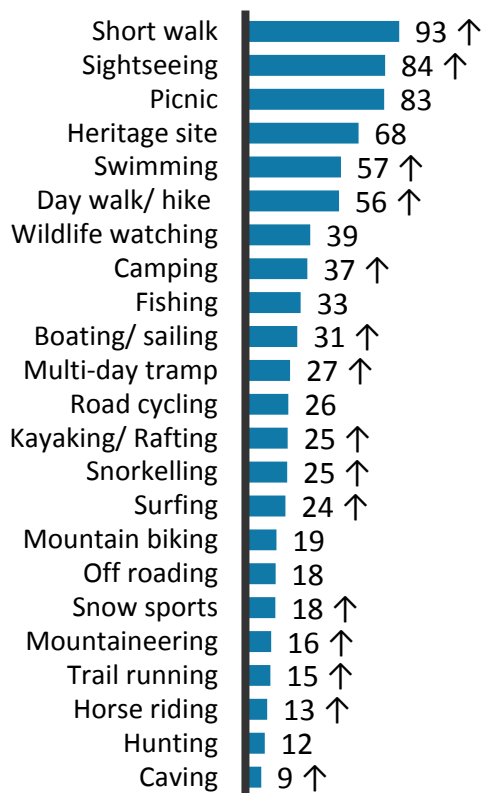


Figure 3. Aucklanders' participation in the New Zealand outdoors in the past year (%). Note: The upward arrows (↑) indicate higher participation by Aucklanders compared with all New Zealanders.

Together, the results of the quantitative and qualitative analyses showed that Aucklanders:

- had higher participation in water-based activities than all New Zealanders combined, which was unsurprising since beaches and rivers are easily accessible to them
- felt they have lots of indoor and outdoor activities on their doorstep that are at a relatively low cost, require minimal travel and have easy public transport access (note that analysis of the survey data for all New Zealanders showed that access was a bigger issue for those with low incomes, large families and mobility issues)
- considered traffic delays to be a constraint on participation – indeed, this was the top barrier (37%) preventing Aucklanders from engaging in recreation and heritage activities in the outdoors, as they try to avoid traffic congestion, queues, crowds and parking issues (Figure 4) – for example, it can easily take up to 2 hours for some Aucklanders to get out of the city, whereas people living in Christchurch and Queenstown can easily reach the 'great outdoors' within 1.5 hours.

Top four outdoor recreation barriers

- 37%** - Traffic delays (↑)
- 33%** - Prefer to do other things
- 32%** - Cost too much to get there
- 32%** - Finding things that fit in with lifestage

Figure 4. Top four outdoor recreation barriers for Aucklanders. Note: The upward arrow (↑) indicates a greater barrier compared with all New Zealanders.

Auckland City Council is best-placed to meet the needs of Aucklanders within its boundaries through its network of parks and reserves. However, there is an opportunity to improve Aucklanders' access to the outdoors beyond these boundaries by looking for ways to support those people who are least able to afford to travel further out.

1.2.2 What Aucklanders said

Note: This section contains references to the customer segments, which are explained in detail in section 2: Needs and motivations. For clarity, the needs-based customer segments are differentiated and labelled as follows: Mindful Actives, Social Actives, Enthusiastic Actives, Stimulation Actives, Home-Close Actives and Other Things Actives.

The qualitative focus groups conducted in Auckland highlighted the following points for Aucklanders in the outdoors.

- The Auckland outdoors is diverse and varied, and water-based activities at beaches and rivers are within easy reach for most residents.
- Leisure, sports activities and short walks are popular amongst Aucklanders. Aside from issues caused by traffic congestion, most Aucklanders can easily head out of the city to undertake day walks.
- Working out how to negotiate traffic and get to places quickly is a constant consideration for Aucklanders.
- In a busy urban context, doing things outdoors helps Aucklanders to reconnect with others and with nature.
- Stimulation Actives are more likely to live in Auckland and so need to travel to reach the 'remote' activities they enjoy.

A few of the ethnographic interviews with New Zealanders who closely represented the different needs-based segments were with Aucklanders. The following quotes show their reflections on their everyday outdoor experiences.

"We often go to Kohimarama Beach, which is where I was this morning. It is only an 8-minute drive from here, so it is a nice city beach to go to when we can't go further away, and it never used to be really busy but now if you go on a weekend day in summer it is getting really busy. So when I go outdoors during the week, I enjoy the peace and quiet. There is less noise, I can hear the birds chirping and the sea and it just feels really calming in the middle of a busy life." Female Social Active, Auckland.

"... if it is sunny this weekend, just make sure we get out of Auckland again. It is almost like you have had a holiday even if you just go for one day. That is how it feels to me, like I am back and calmer and rested but also more invigorated. Female Social Active, Auckland.

"[Outdoors] ... became more important. Health and mental health, I think. Just to avoid being anxious. Get a bit of exercise. I do think there is an effect that nature has on people as well, whatever that is. Reminds us we are part of nature as well. Human

beings, even though we are on our computers and in cities of concrete, we eat stuff from the ground. It grounds you.” Male, Mindful Active, Auckland.

“We go and stay with people at Langs Beach up north and our friend has a bach at Piha. We have always taught the boys if you find rubbish observe it first and find out if it is safe to remove it and do so. The safety thing is important because about a year ago there was rubbish left outside our building here and they had used needles in it. So it is important for them to always think of safety first.” Male Enthusiastic Active, Auckland.

“With the age of my boys currently, keeping them off technology is a good enough reason to [be outdoors]. That is the biggest challenge I am finding is our generation is having to deal with not only technology but our 14 year old and social media. Keeping them connected to the real world.” Male Enthusiastic Active, Auckland.

1.3 Cantabrians and Otago residents in the outdoors

Note: The information in this section combines the qualitative findings from three focus groups in Christchurch, one focus group in Queenstown and ethnographic interviews in both locations with data from the quantitative survey.

According to the New Zealand census, there were 1.10 million New Zealanders living in the South Island in 2018, representing 23% of the population.

1.3.1 Cantabrians’ participation in outdoor activities

The frequency of participation in activities by Cantabrians is shown in Figure 5.

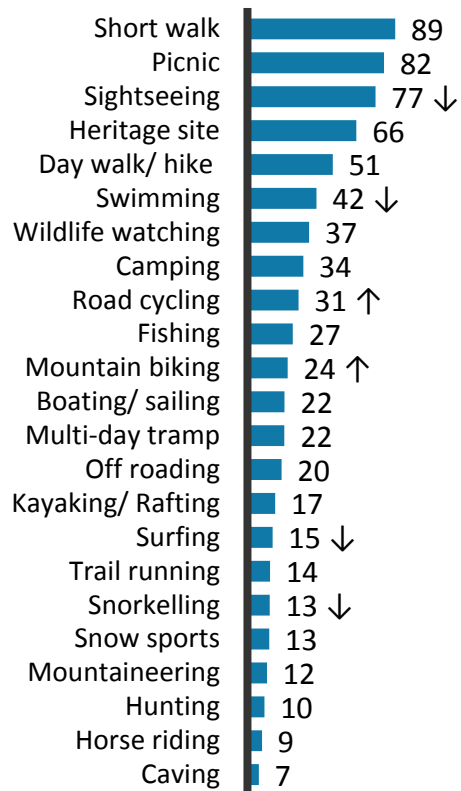


Figure 5. Participation in the New Zealand outdoors in the past year by people living in Canterbury (%). Note: The upward and downward arrows (↑/↓) indicate higher and lower participation, respectively, by Cantabrians compared with all New Zealanders.

The results of the quantitative analysis showed that:

- Cantabrians undertook mountain biking and road cycling as key activities
- Cantabrians had much higher participation in activities such as short walks and picnics/barbecues than more strenuous activities

1.3.2 Otago residents' participation in outdoor activities

The frequency of participation in activities by Otago residents is shown in Figure 6.

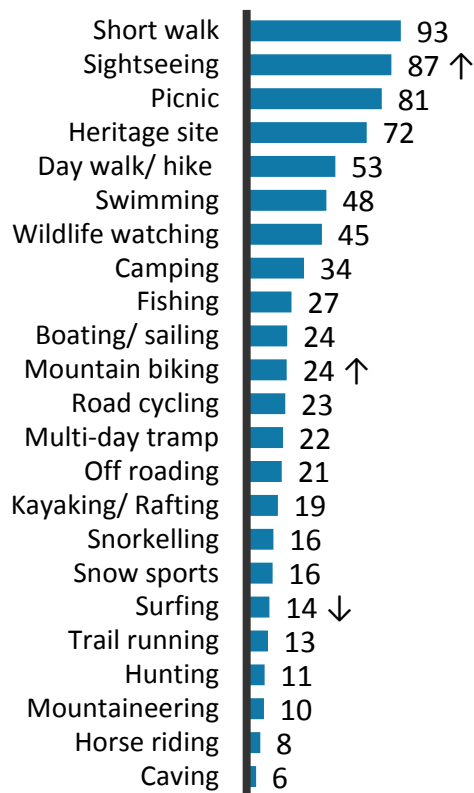


Figure 6. Participation in the New Zealand outdoors by people living in Otago (%). Note: The upward and downward arrows (↑/↓) indicate higher and lower participation, respectively, by Otago residents compared with all New Zealanders.

The results of the quantitative analysis showed that:

- New Zealanders living in Otago had higher participation in sightseeing and mountain biking than all New Zealanders
- 90% of Otago respondents agreed that access to the outdoors was a major positive of living in New Zealand (Figure 7)
- only 42% of Otago respondents agreed that they take pride in the current state of the New Zealand outdoors, which was lower than the level of agreement for all New Zealanders (Figure 7)

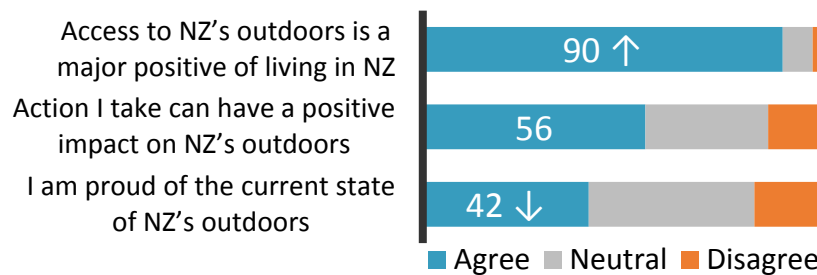


Figure 7. Percentage agreement by Otago residents with statements about the New Zealand outdoors. Note: The upward and downward arrows (↑/↓) indicate higher and lower agreement, respectively, by Otago residents compared with all New Zealanders.

- Queenstown residents were more tuned in to safety, the environment and heritage, and expressed concerns about the impact and burden of growing visitor numbers on places
- Note, provincial South Islanders were more likely to have their expectations met at recreation places (88%) and cultural and historic heritage sites (82%) than all New Zealanders.

1.3.3 What Christchurch and Queenstown residents said

Qualitative focus groups conducted in Christchurch and Queenstown showed that:

- residents of both places especially value their close access to the ‘great outdoors’ – rivers, lakes, beaches, mountains, glaciers and fiords
- residents of both places are willing to travel for 1.5–2 hours for day trips to places such as Methven and Hanmer Springs
- Christchurch residents appreciate their easy access to urban parks and reserves, as well as the ‘great outdoors’
- Christchurch residents are less likely to engage in biodiversity actions but are still concerned about the prevalence of environmental degradation and polluted waterways
- a passion for outdoor activities is a key driver for people living in Queenstown, with their lifestyles and livelihoods relying on the quality of Queenstown’s stunning environment and recreational experiences, which range from leisurely to challenging activities, such as walking, hiking, tramping and hunting.

The following quotes from the qualitative focus groups conducted in Christchurch and Queenstown and an ethnographic interview in Dunedin show the reflections of South Island residents on their experiences of being in the outdoors.

“I will drive up [to the Port Hills] and there is a spot up there I like, and I go up and sit and it looks out over the whole of Canterbury. So I like getting away from the noise of Christchurch. We can get up north very quickly and the motorway has given us access to the east side of Christchurch, which is the beaches and stuff. I love that ... I love living here because I am really close to both gorges. I will go on the occasional swim, go on the walks around the river.” **Female Mindful Active, Christchurch.**

“When you are going out and about you get to see dead animals and that sort of thing and that turns you off at times. Native birds that shouldn’t be dying. Some farms that do the wrong things, polluting the rivers. Highways that people have just dumped their rubbish on. People who own cars who have abandoned them on the side of the road, unregistered just left lying to rust.” **Male Enthusiastic Active, Dunedin.**

“I have got adventure, mountainous and exciting. For me it is one more ridge to explore and there is just not enough time. When you are an outdoorsy person, it is like being on this ridge and going ‘I wonder what is over that ridge’, then you get there and go ‘I wonder what is over on that ridge’. There is just too much to do.” **Male Stimulation Active, Queenstown.**

1.4 Companions in the outdoors

The research findings on ‘who people go with’ when participating in outdoor activities showed that participation was high amongst both family groups and adult groups (see Figure 8), highlighting the importance of delivering experiences for all New Zealanders. In particular:

- 58% of New Zealanders reported that their most usual outdoor companion was their partner or spouse
- 75% of respondents said they usually visited outdoor recreation and heritage sites with adult family (partners / adult children / parents / in-laws / other family), followed by adults who were not family, such as friends/colleagues (47%), while 33% said they went with children (pre-school aged/school-aged/teenagers)
- 58% of under 30s usually went into the outdoors with friends, whereas 27% of those aged 60 plus were likely to go by themselves.

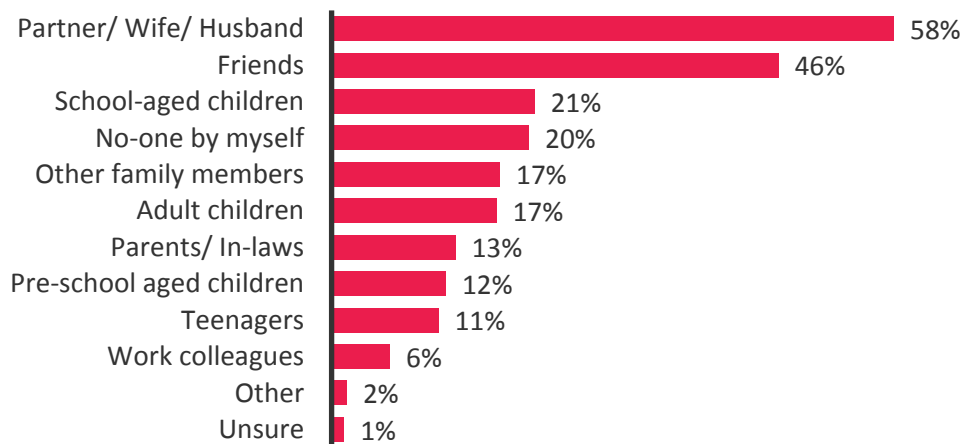


Figure 8. Percentage of response to Q2a: ‘When engaging in recreation and heritage activities in the outdoors, who do you usually go with?’ ($n = 3,837$; multiple response question).

1.5 Influence of seasons

Season was found to affect participation in outdoor activities, with New Zealanders generally spending the most time in outdoor recreation places in summer. However, other factors, such as life stage, also had an influence in some cases. In particular:

- respondents aged 60 plus were more likely to prefer the shoulder seasons of autumn and spring than younger respondents
- those with dependent children were more likely to say they spent the most time in outdoor recreation places in the summer (79%) than those without dependent children (67%)
- respondents who participated in water-based activities were more likely to say they preferred the summer (80%)
- city dwellers were more likely to prefer the summer (73%) than those who lived provincially or rurally (66%).

1.6 Willingness to travel

When asked how long they would be prepared to travel for a day trip in the New Zealand outdoors, 32% of respondents were willing to travel between 1 and 2 hours, while 27% said they would travel for between 2 and 3 hours (Figure 9).

New Zealanders who were willing to travel for 3 or more hours were more likely to be:

- male (29%)
- under 30 (33%)
- Māori, Pasifika or Asian (33-39%).

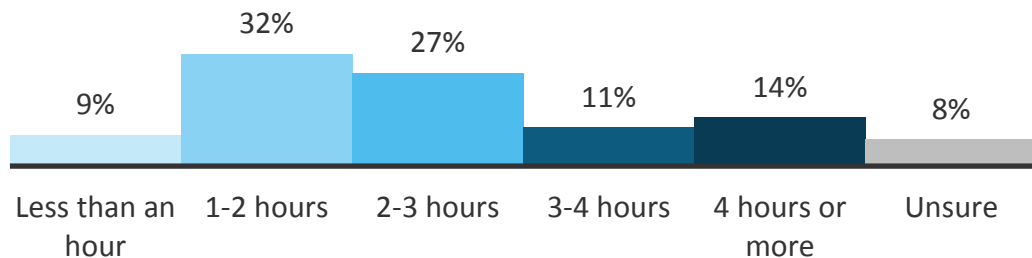


Figure 9. Percentage of responses to Q1b: 'If you were planning a day trip in the New Zealand outdoors, how long are you prepared to travel to do activities?' ($n = 3,837$).

2 Needs and motivations

2.1 Benefits of outdoor experiences

When survey respondents were asked to describe in two to three words the key benefits they get from being in the New Zealand outdoors:

- 41% mentioned mental health benefits, 35% mentioned physical health benefits and 34% mentioned connection with nature (see Table 1)
- older people mentioned fitness, health and fresh air more, while younger people mentioned connecting with nature and enjoyability more
- respondents with high participation in outdoor activities mentioned enjoyment, socialising and adventure more.

Table 1. Percentage of responses to the question 'List two or three words you would use to describe the key benefits that you get from being in New Zealand's outdoors' ($n = 3,837$; multiple response question).

Themes	Sub codes	%
Mental health/ wellbeing/mindfulness	Improves mental health/wellbeing	10%
	Relaxing/peaceful/quiet/tranquillity/de-stress	25%
	Mindful/gratitude/appreciation/meditative	5%
	Restorative/refreshing invigorating	8%
	NET	41%
Health/fitness exercise	Exercise/fitness	26%
	General 'healthy' comment	10%
	NET	35%
Connection with nature/scenic/pure	Natural beauty/scenic views/ wildlife/connected with nature	25%
	Freedom/open spaces/isolated/ solitude	8%
	Clean/pure/tidy fresh/green	5%
	NET	34%
Fresh air and sunshine	Fresh air	28%
	Sunshine/vitamin D	3%
	NET	29%
Enjoyable/social adventure	Fun/enjoyable/happiness/joy/pleasurable	14%
	Social/time with family and friends	5%
	Free/affordable activity	2%
	Adventure/achievement/challenging/explore	2%
	NET	21%
Other	Other	3%
	Unsure	3%
	None/nothing	2%
	NET	8%

Different customer segments also had different needs and motivations – for example, those seeking a spiritual connection with the outdoors received different benefits from being in the outdoors and in nature than those seeking a physical challenge in the outdoors, as illustrated by the following quotes from the ethnographic interviews.

“I took my car and I had maps of Dunedin and I chose where I wanted to go. Fantastic. I wanted to find ... a monument that is right up on the top of the mountain and I walked up there on a really blustery day. It was amazing. It was so black and I managed to get up there and back before the rain started. They have a museum there with all the old relics ...” Female Mindful Active, Christchurch.

“Skiing, wakeboarding, trout fishing, water skiing. I don’t find water skiing or wakeboarding as exciting or as much of a thrill as skiing. It is not so challenging ... We are looking forward to living in the Hawke’s Bay where the mountains, rivers and beaches are all easier to get to.” Male Stimulation Active, Auckland.

An analysis of needs and motivations is provided in section 2.2, giving deeper insight into how these benefits translate for different customer segments.

2.2 Needs and motivations of different customer segments

A needs and motivations model was developed by DOC to help make sense of the qualitative and quantitative data. It shaped the development of UMR’s final segmentation model and framed the ethnographic interviewing. The research sampling that fed into the development of this model included eight focus groups (2018) and an online survey (2019), which was completed by 3,837 New Zealanders.

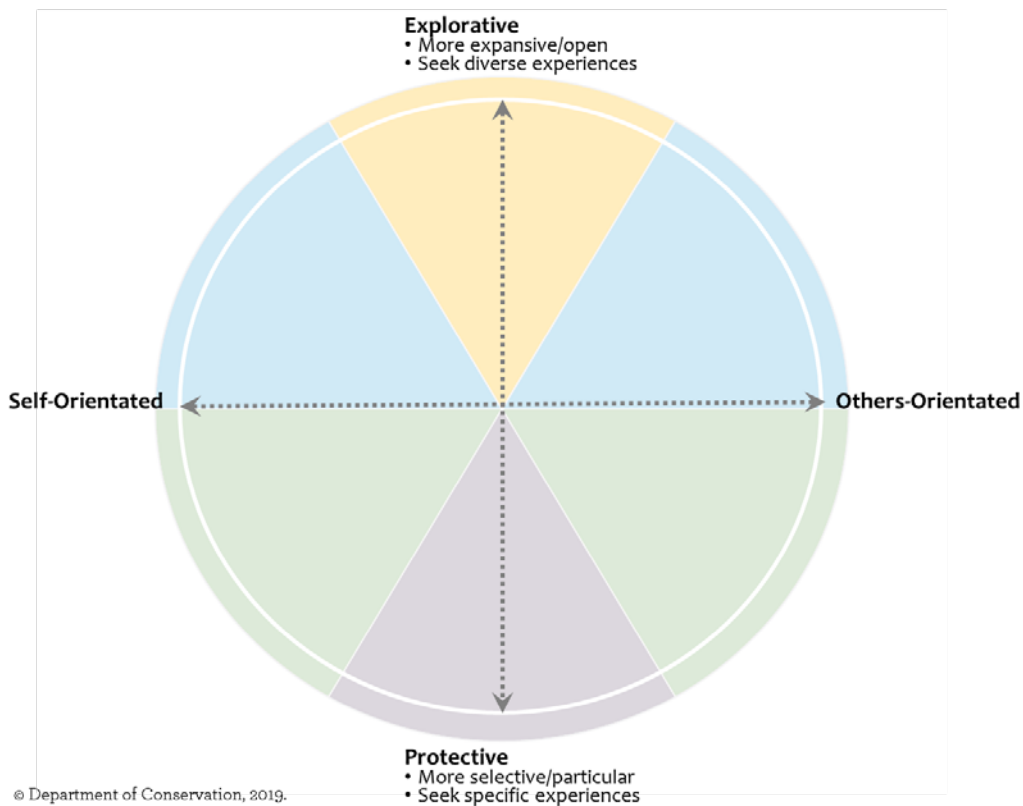


Figure 10. Base model showing the key drivers that explain the differences between New Zealanders when participating in outdoor activities.

In Figure 10, the key drivers (vertical and horizontal axes) explain differences between New Zealanders when participating in outdoor activities. The vertical axis represents people's relationships with the outdoors, the extreme ends of which represent 'Explorative' and 'Protective' approaches to the outdoors, respectively. People who are closer to the 'Explorative' end take a more open and expansive approach to the outdoors, are looking for diverse and varied experiences, and are open to trying out new things. Those who are closer to the 'Protective' end take a more selective approach to the outdoors and are looking for quite specific experiences that fit well with their preferences.

The horizontal axis represents people's relationships with others, the extreme ends of which represent 'Self-Orientated' and 'Others-Orientated' approaches, respectively. 'Self-Orientated' people are primarily concerned with fulfilling the needs and wants of themselves, so being in the outdoors is more of a personal and solitary experience (even when they are with others). 'Others-Orientated' people are more concerned with fulfilling the needs and wants of others, so being in the outdoors is a shared experience that is as much about the other people they're with as it is about the place or experience they are in. Both axes are continua, so people can sit anywhere along these. Furthermore, while people will predominately belong in one place, they may shift along the axes in different situations and at different times.

2.2.1 Customer segments

The findings showed that New Zealanders' needs, motivations and behaviours were complex, so a needs-based model was developed to help make sense of and simplify that complexity. The key drivers outlined above helped to form the foundation of the model, and the customer segments were developed from these key drivers by overlaying the qualitative and quantitative outputs. This resulted in six key customer segments being identified that reflected New Zealanders' participation in outdoor activities (Figure 11).

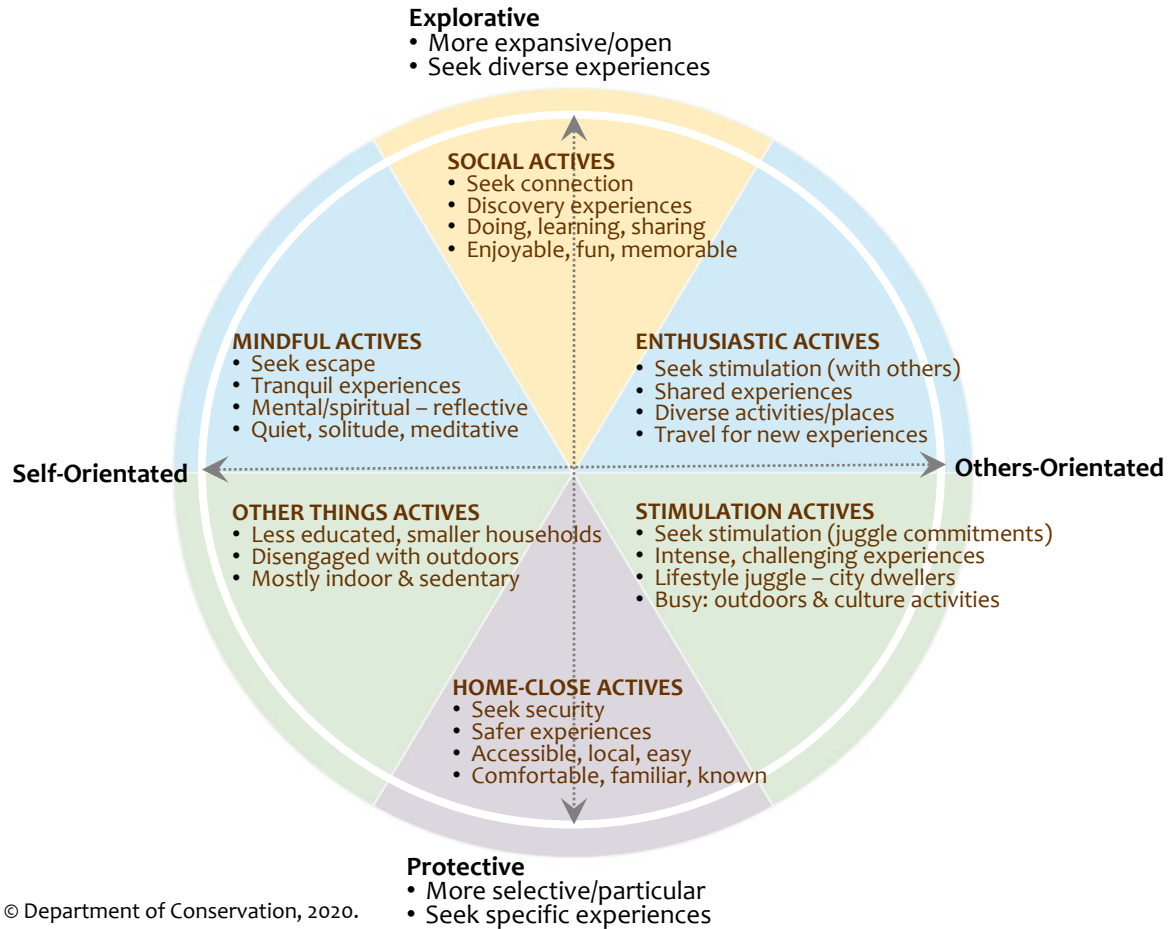


Figure 11. Needs and motivations model showing the six key customer segments identified.

It is important to note that these six segments do not represent all New Zealanders but rather represent the most prominent groups. Also, people will not necessarily share every characteristic of the segment they are in, and the model and segments are dynamic, so while people will mostly belong in one segment they may shift into others in different situations and at different times – for example, Stimulation Actives may migrate into Enthusiastic Actives territory when participating in shared activities with extended family members.

2.2.2 Quantitative confirmation of segments

The 3,837 New Zealanders who completed the quantitative survey were allocated to the segments they best fitted to help determine the likely size of each segment. The dots in Figure 12 show the average positions of people within each segment.

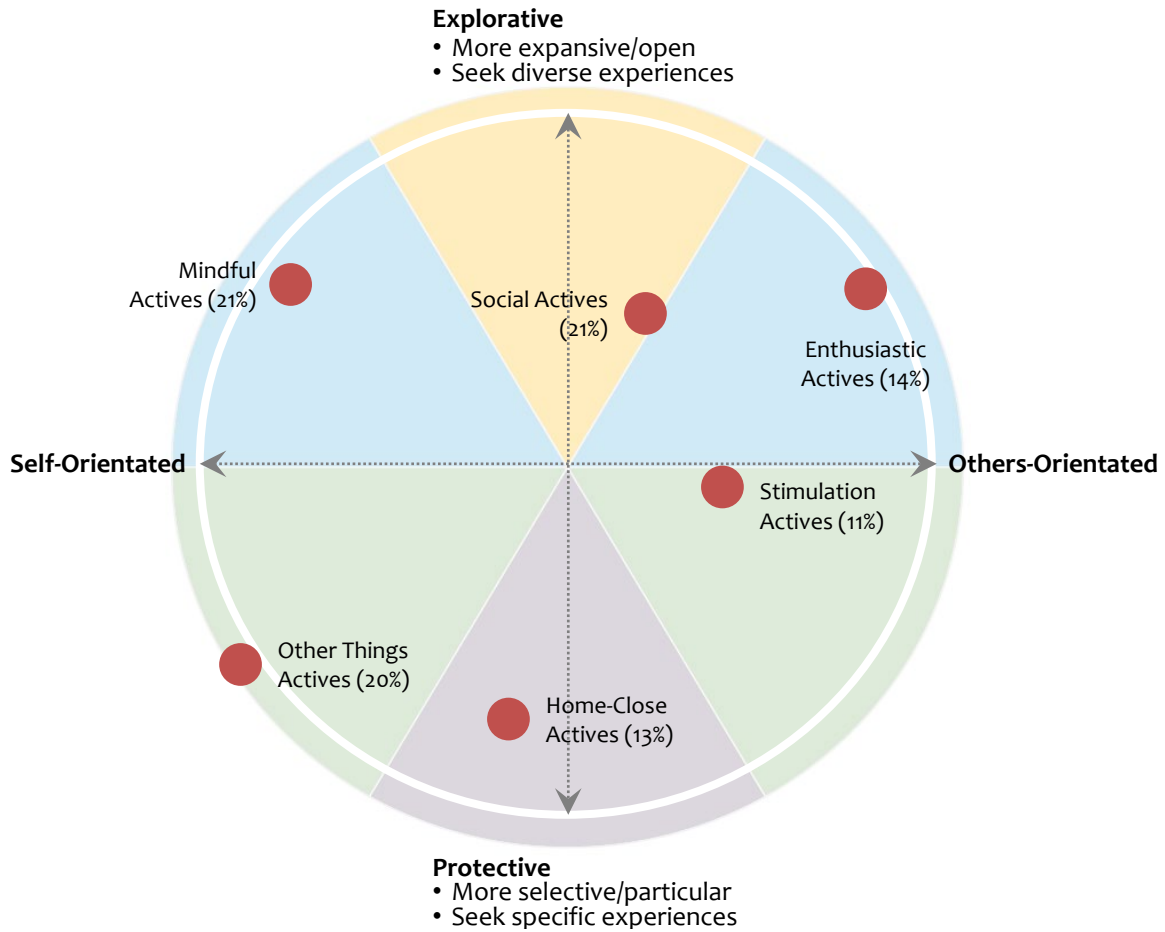


Figure 12. Needs and motivations model showing the average positions of people within each segment (dots).

2.2.3 Customer segment sizes and descriptions

Overlaying the quantitative data and information onto the qualitative segments made it possible to identify ‘which’ segments the New Zealanders surveyed fell into and the profiles of these segments (Figure 13).

It should be noted that the percentages or sizes of the segments are representative of the allocation at the time of the survey. Shifts can occur over time and the COVID-19 context may have changed the shape of some customer segments – for example, safety concerns may be heightened for Home-Close Actives, or getting into the ‘great outdoors’ may be heightened for Stimulation Actives following lockdown.

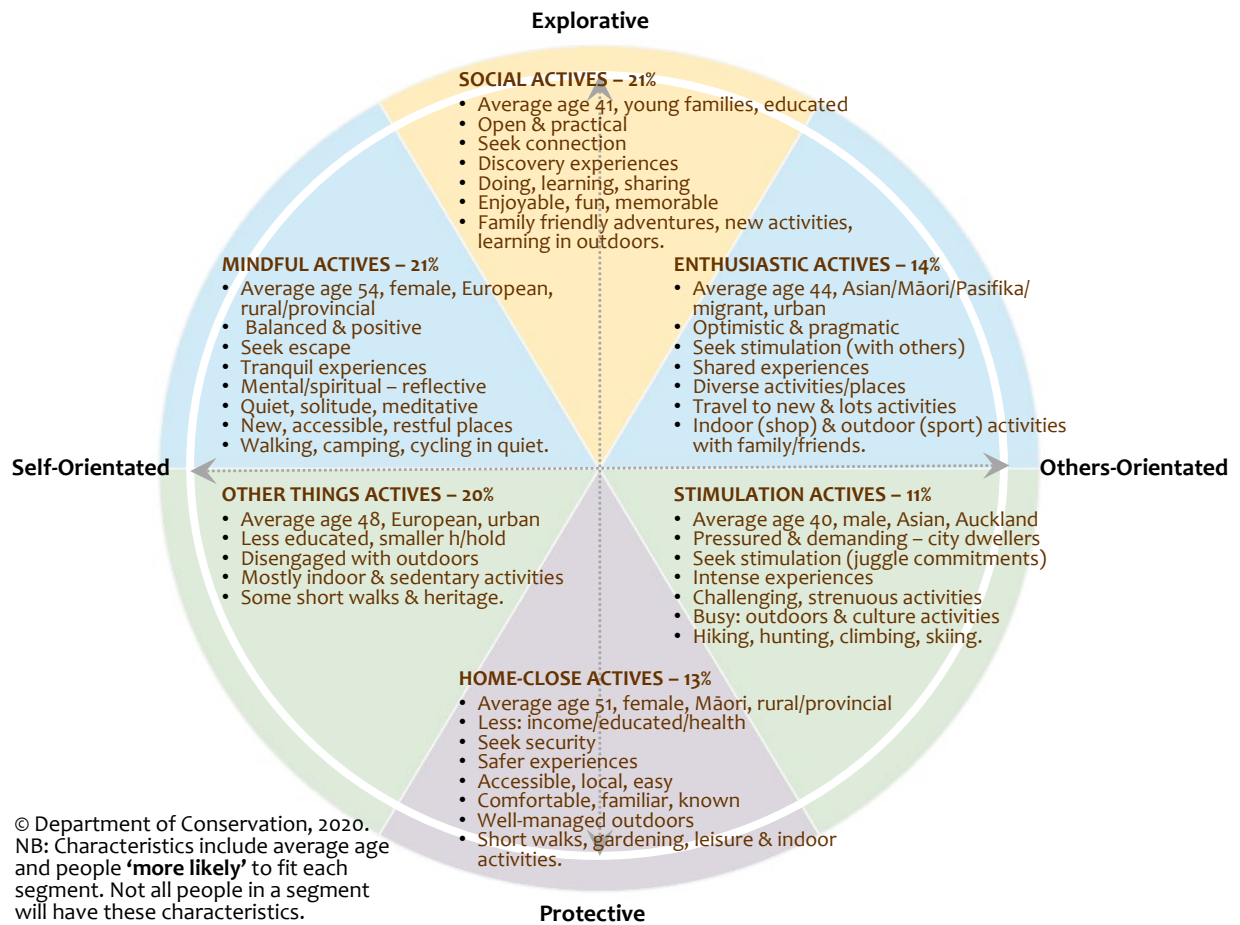


Figure 13. Needs and motivations model showing the profiles of the six segments.

The following differences are particularly evident for each segment.

- **Mindful Actives** are more likely to be older (average age 54), European, tertiary educated, female and from rural/provincial areas. They are likely to be empty nesters with higher incomes and in good health. They seek outdoor experiences that allow them to escape into nature for tranquility and quiet. Restful, accessible places where they can immerse in nature fit well. They like to stay physically active and are likely to participate in walking, cycling or camping experiences. Being in the outdoors brings balance to their life.
- **Social Actives** are more likely to be younger (average age 41), have dependent families and be tertiary educated. Gender is equally split. They seek outdoor experiences that allow them to connect through learning and discovery activities and experiences – but it helps if they are also fun and memorable. They are likely to look for family-friendly adventure activities where everyone enjoys learning something new together. Being sociable and connecting with others is important, as is exploring and experiencing new things and places.
- **Enthusiastic Actives** are more likely to be younger (average age 44), although they also fit across other age groups, and live in main cities. Gender is equally split. Māori, Asians, Pasifika and recent migrants are more likely to be Enthusiastic Actives. They seek outdoor experiences for stimulation, but sharing activities with others is an important part of that experience. They are likely to look for new and diverse activities and places they can enjoy with their family and friends. They are enthusiastic about the outdoors as well as other leisure activities. They tend to go to popular places.

- **Stimulation Actives** are more likely to be younger (average age 40), male and live mainly in Auckland in larger households with extended family and children. Asians and recent migrants are particularly prevalent in this segment. They seek outdoor experiences for stimulation, although they must also juggle those activities around commitments with others in their households. They participate in a wide range of non-outdoor activities as they like to be busy and active. They look for challenging activities outdoors that offer a more intense and strenuous experience and so are more likely to participate in hiking, hunting, climbing or skiing experiences.
- **Home-Close Actives** are more likely to be older (average age 51), female and from rural/provincial areas, and live in single households with lower incomes. They are less likely to be educated and in good health and include a high proportion of Māori. They seek outdoor experiences that provide a sense of security and tend to opt for safer, more accessible and well-managed local outdoor experiences. They often spend time visiting and connecting with family and friends. They are more likely to participate in short local walks and gardening at home.
- **Other Things Actives** are more likely to be older (average age 48), although they also include other age groups. They are generally European, live in urban areas either alone or with a partner, and tend to be less educated and from smaller households. Gender is equally split. These people are not engaged with the outdoors, preferring indoor sedentary activities. They are likely to do short local walks or activities for moderate fitness. They may also visit cultural and historic heritage sites. They take fewer holidays. However, they do maintain connections with family and friends. Note: This segment was not explored more fully through qualitative research.

2.2.4 Common characteristics among segments

Social and Enthusiastic Actives

Social and Enthusiastic Actives have several characteristics in common (Figure 14). Being connected and participating with others in the outdoors is important to both segments, so they opt for group activities that engage and interest everyone. They are also very active in the outdoors, always looking for new things to do.

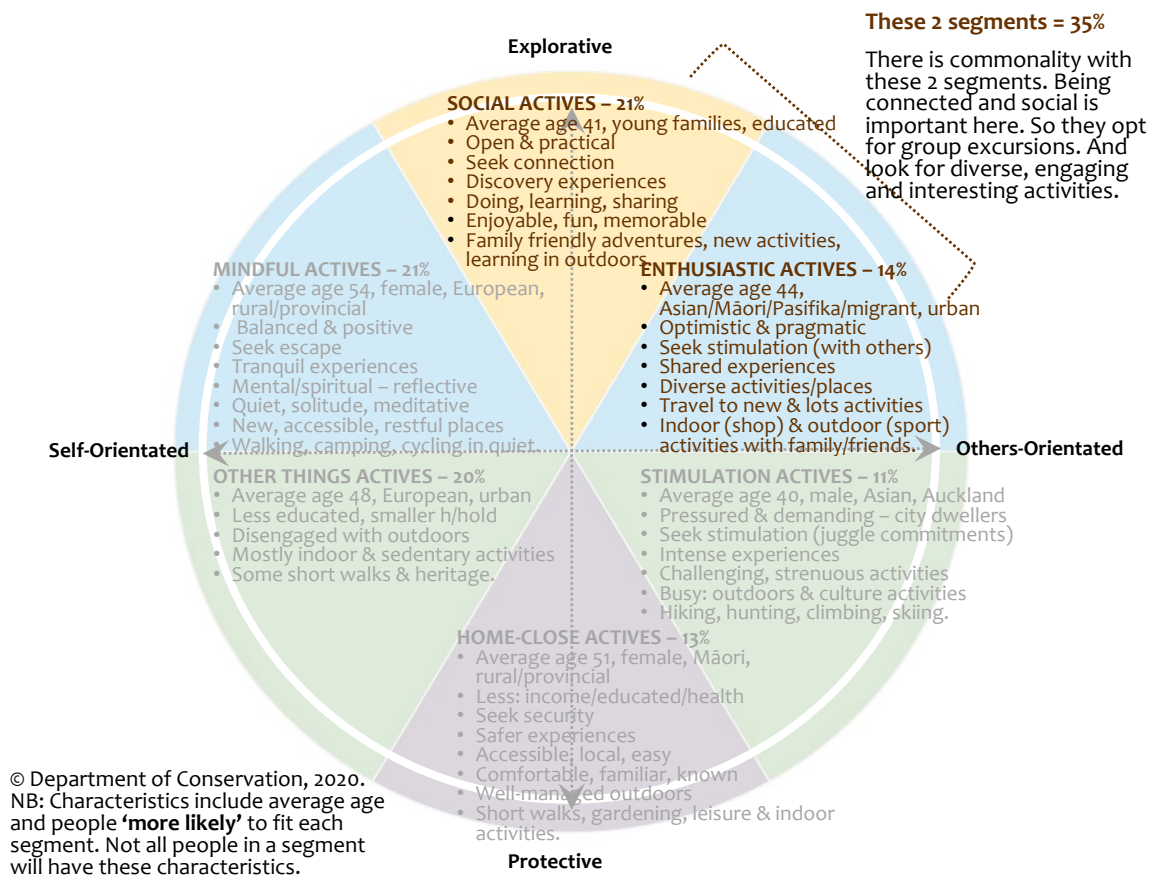


Figure 14. Needs and motivations model showing commonalities between Social and Enthusiastic Actives.

Home-Close and Other Things Actives

Home-Close and Other Things Actives also share some characteristics, with both segments seeking the security the indoors offers and so tending to do more home-based activities (Figure 15). Well-managed and accessible local leisure activities suit them both.

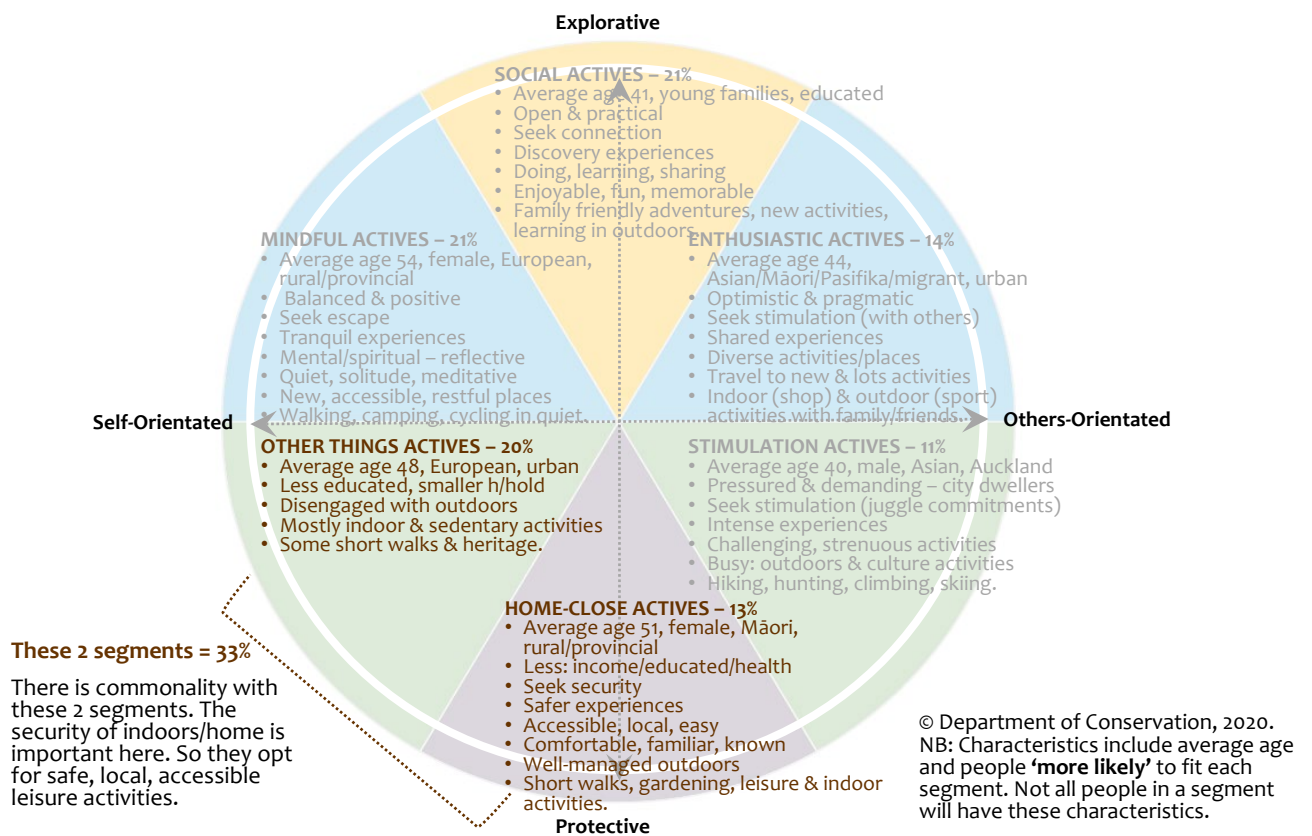


Figure 15. Needs and motivations model showing commonalities between Home-Close and Other Things Actives.

2.2.5 What people said

The quotes shown in Figure 16 were taken from the ethnographic interviews and bring the customer segments to life, illustrating how different people seek different activities and experiences in the outdoors.

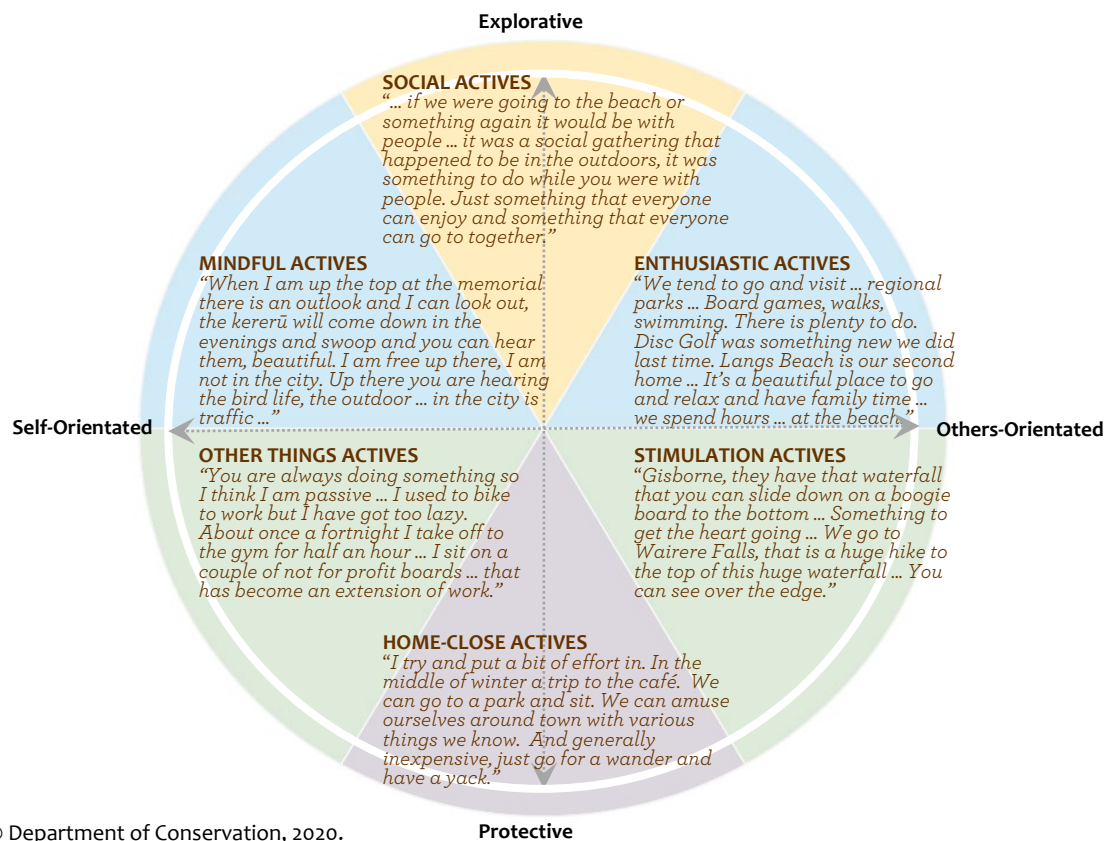


Figure 16. Illustrative quotes for each of the segments in the needs and motivations model.

2.3 Delving deeper into the segments

This section provides more details on the main characteristics of New Zealanders in each segment and how they participate in outdoor activities. It should be noted that these characteristics include average age and define people that are **'more likely'** to fit each segment – not all people in a segment will have these characteristics. The information provided has been taken from the qualitative research phases.

2.3.1 Mindful Actives

Mindful Actives made up 21% of the New Zealanders surveyed. The following key characteristics differentiate them from other segments.

- Average age 54, female, European, live in rural or provincial areas.
- Balanced and positive.
- Seek escape.
- Prefer tranquil experiences.
- Are mental/spiritual – reflective.
- Seek quiet, solitude – meditative.
- Visit new, accessible, restful places.
- Enjoy walking, camping, cycling in the quiet.

Mindful Actives are more likely to be older and female and to live in smaller households – they are often empty nesters. They are very active in the outdoors and are keen on staying both mentally and physically fit and well.

According to the quantitative survey, the top three outdoor activities Mindful Actives participated in on at least a monthly basis were short walks (87%), sightseeing (38%) and picnics/barbecues (38%). They were also more likely than all New Zealanders to have taken part in short walks, picnics/barbecues, watching wildlife and swimming in the outdoors. They were more likely to do outdoor activities with friends or solo than all New Zealanders.

Mindful Actives have a strong preference to stay away from popular and crowded places, so they will travel to get to more tranquil and quiet areas. The mental and spiritual benefits of calmness and peacefulness gained from being in nature are important, as are getting away from everyday routine and reflecting. They look out for new places but also want good information to guide travel and walking times.

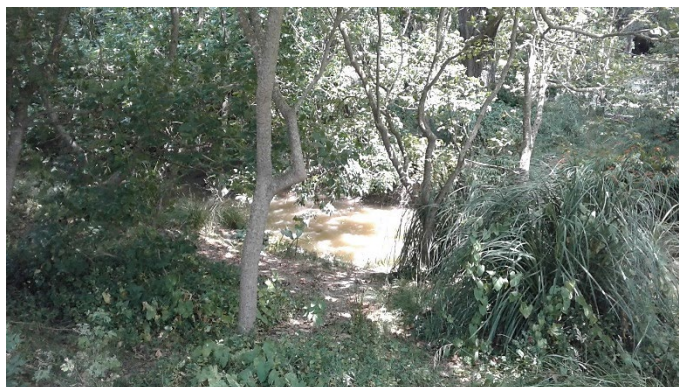
Being surrounded by and immersed in nature is important to Mindful Actives. They enjoy the full sensory and holistic experience of seeing, hearing and smelling nature and their surroundings. The emotional and spiritual experience of places is as important as the physical benefits of being in nature.

Spending time around the home is also important, so Mindful Actives are likely to enjoy gardening and DIY activities around their home. They are also likely to participate in conservation activities in some way, encouraging wildlife and planting natives in their garden. Those surveyed were more likely to rate the state of New Zealand's biodiversity as poor.

The ethnographic phase of research delved more deeply to understand how Mindful Actives participate in outdoor activities. A snapshot profile using a fictitious name is summarised below to bring this to life.

Diana – 60 years, NZ European/Māori, female, lives alone, has two adult children and one grandchild, Whanganui

- Activities include walking the dog daily plus bush walks with friends and family.
- Enjoys the full sensory experience of walking in nature: colours, smells, trees, birdlife, tides, etc.
- Likes Whanganui as it has retained its heritage, has arty offerings, trains, vintage cars plus the river and ocean.
- Is concerned about swimmable rivers and litter.



Caption: Local Stream

Photo: Diana

“... looking out for wood pigeons, fantails are my favourites ... I am interested in our native birds ... see more wood pigeons ... I have tūi in the flax bush. I saw a pūkeko ...”

“You are just out in nature catching some rays. Being outside and breathing in some fresh air ... Let's your brain rest maybe ... mindfulness.”

“I do object although this is probably not a conservation thing, I really object to those water bottling plants taking our pristine water and selling it overseas. I do worry about the fact that a lot of our rivers aren’t swimmable anymore.”

2.3.2 Social Actives

Social Actives made up 21% of the New Zealanders surveyed. The following key characteristics differentiate them from other segments.

- Average age 41, young families, educated, less likely to have been born in New Zealand.
- Open and practical.
- Seek connection.
- Prefer discovery experiences.
- Like doing, learning and sharing.
- Seek enjoyable, fun and memorable activities.
- Enjoy family-friendly adventures, new activities and learning in the outdoors.

Social Actives are more likely to be young families. They have busy and active lives and juggle multiple commitments, including children, mortgages, jobs and relationships, so their outdoor experiences are shaped by those demands. Family-friendly activities are very important to this segment.

According to the quantitative survey, the top three outdoors activities Social Actives participated in on at least a monthly basis were short walks (82%), sightseeing (35%) and picnics/barbecues (33%). They were also more likely than all New Zealanders to have taken part in short walks.

Young families are likely to be more pragmatic about how they spend time in the outdoors. Activities must be accessible, safe and family-friendly. They are likely to look for new places where children can discover and learn through activities. Their preference is for low or no cost activities and unrestricted access to the outdoors.

The social experience of being in the outdoors is as important as the physical experience – connecting with friends and family in nature is important. Social Actives look for opportunities for curiosity and exploration by doing new activities in new places. An experience of spontaneity and togetherness is important.

Indications of walking and travel times and access to facilities were considered important to the Social Actives who were surveyed. Information is important for supporting young families in being prepared for the outdoors and they are likely to check the DOC website for detailed information. Young families are open and willing to help protect the outdoors and will undertake activities to encourage wildlife into their gardens.

The ethnographic phase of research delved more deeply to understand how Social Actives participate in outdoor activities. A snapshot profile using a fictitious name is summarised below to bring this to life.

Melissa – 45 years, French migrant, female, lives with a partner and two children, Auckland

- Spends weekends with friends and family in the outdoors.
- Regularly visits Auckland’s West and East Coast beaches, local parks, the waterfront, Tiritiri Matangi Island, Motuihe Island / Te Motu-a-Ihenga, Motutapu Island and Kawau Island.
- Activities include walking the dog, surfing, skateboarding, outdoor clean-ups and tree planting.
- Spends time with family and friends at the beach, barbecues, picnics, cafes and farmers markets.
- Believes in protecting the environment and contributing to society.



Caption: Local Market

Photo: Melissa

“I feel like as a family we’re connecting more when we’re outdoors doing something ... My son, sometimes I say let’s walk the dog after school and that is when he is maybe going to talk about stuff that’s going on at school...”

“If it’s a sunny weekend ... we get out of Auckland. It’s almost like you have had a holiday even if you go for one day ... I’m calmer and rested but also more invigorated.”

“We often do a beach clean-up ... have done a few tree planting days as well ... we have really reduced plastic consumption, even at home we don’t use Glad wrap anymore ... We compost things ...”

2.3.3 Enthusiastic Actives

Enthusiastic Actives made up 14% of the New Zealanders surveyed. The following key characteristics differentiate them from other segments.

- Average age 44, Asian/Māori/Pacific Island/migrant, live in urban areas, tertiary educated.
- Include families and larger households.
- Optimistic and pragmatic.
- Seek stimulation (with others).
- Prefer shared experiences.
- Enjoy diverse activities/places.
- Look out for new activities.

- Enjoy indoor (shopping) and outdoor (sporting) activities with family/friends.

Enthusiastic Actives are more likely to be families (with younger or older children) and larger households that are more likely to include extended family members. They also participate in outdoor activities with friends and workmates, so larger gatherings are common. These people's lives are busy and active. Activities must be family-friendly, so they look out for suitable facilities for both younger and older family members. They are more likely to use the DOC website to help decision-making.

According to the quantitative survey, the top three outdoor activities outdoors activities Enthusiastic Actives participated in on at least a monthly basis were short walks (89%), sightseeing (51%) and picnics/barbecues (51%). They were also more likely than all New Zealanders to have taken part in these activities, as well as a range of other activities, such as day and multi-day walks, swimming outdoors, visiting a cultural or heritage site, bird/wildlife watching, and road cycling and camping.

People in this segment are enthusiastic about the outdoors. They look out for new and popular places and are willing to travel for 3 or more hours to get there. They are likely to go to places where there are multiple activities available for different ages. Finding accessible and affordable activities is a key consideration.

Because Enthusiastic Actives are enthusiastic about everything, outdoor activities compete with other activities. They are likely to go to live concerts, sports games and museums. They are interested in the world around them and are always looking for something new and different to do.

Enthusiastic Actives are more likely than all New Zealanders to encourage wildlife into their gardens and participate in public clean-ups. They are enthusiastic about taking conservation and biodiversity actions and are more likely to do this through organised community activities.

The ethnographic phase of research delved more deeply to understand how Enthusiastic Actives participate in outdoor activities. A snapshot profile using a fictitious name is summarised below to bring this to life.

Tanika – 25 years, Indian migrant, female, married, no children, Wellington

- Commitment to church community and daily prayer practice is important.
- Regularly walks in local reserves and bush for exercise, health and relaxation.
- Activities around discovering NZ: place, people and culture. Impressed by striking scenery and care for environment.
- Visiting places that are also popular with internationals like Hobbiton, Waitomo, Huka Falls and Wai-O-Tapu.



Caption: Tamaki Māori Village

Photo: Tanika

“It (Waitomo Caves) is adventurous for me. But I want to see everything. I want to see it and experience it ... The guide made it. There was a limestone formation and he created it as a family story and it entertained the tourists.”

“If each and everyone is so generous to nature, we can make it litter free. It’s individual responsibility. Plastic is the main thing. Basic things start from a home. So if we teach our younger generation the same thing they will follow.”

2.3.4 Stimulation Actives

Stimulation Actives made up 11% of the New Zealanders surveyed. The following key characteristics differentiate them from other segments.

- Average age 40, male, Asian, live in Auckland.
- Have pressured and demanding lives.
- Seek stimulation (juggle commitments).
- Prefer intense experiences.
- Like challenging and strenuous activities.
- Need to juggle their lifestyle – city dwellers.
- Busy – take part in outdoor and cultural activities.
- Enjoy hiking, climbing and skiing.

Stimulation Actives are more likely to be male, of Asian ethnicity, recent migrants and city dwellers – mainly from Auckland. They live in households with extended family and dependent children. People in this segment tend to lead busy professional and personal lives and juggle commitments to do what they want. They like to stimulate and challenge themselves, and are active in diverse activities in both the ‘great outdoors’ and urban outdoors. They enjoy strenuous, remote activities and often prefer to do this without family. However, because their households tend to be larger, the opportunity to go into the ‘great outdoors’ may be more constrained.

According to the quantitative survey, the top three outdoor activities Stimulation Actives participated in on at least a monthly basis were short walks (79%), sightseeing (40%) and day walks (38%). They were also more likely than all New Zealanders combined to take part in sightseeing, day and multi-day walks, camping and fishing, as well as remote activities such as snow sports, climbing, caving, hunting and water-based activities (eg fishing and kayaking). Their urban activities included sports games, art performances and museums.

Stimulation Actives could be described as active relaxers. They enjoy strenuous activities for the sense of achievement. The excitement and exhilaration of challenging themselves and others is what makes their outdoor experience. Being with the elements – nature’s natural power, splendour and scale – inspires them.

The survey results indicated that Stimulation Actives’ expectations of the outdoors were less likely to be met compared with all New Zealanders and they were more likely to have physically witnessed biodiversity decline. Stimulation Actives said they took biodiversity actions, such as encouraging wildlife and public clean-ups, but were less likely to consider that their actions have an impact.

The ethnographic phase of research delved more deeply to understand how Stimulation Actives participate in outdoor activities. A snapshot profile using a fictitious name is summarised below to bring this to life.

Sebastian – 31 years, professional, European, male, expecting first child, Auckland

- An educated professional, well-travelled, active in challenging outdoor activities such as skiing, hiking, surfing, mountain biking and diving.
- Daily and weekly activities include going to the gym, playing cricket, swimming, playing golf and weekend walks.
- Values the remoteness and challenge of the New Zealand outdoors.
- Believes in protecting the New Zealand environment and biodiversity. Takes actions towards reducing carbon, meat consumption and plastic use.



Caption: Remote Outdoors

Photo: Sebastian

“I love the challenge, the adventure ... you can do a run over and over and it is still exciting and you can improve each time. I love the cold air and the freshness. There is a distinctive snow smell. The scenery is dramatic. Also, there is a sense of not being totally in control. The weather can change. You might hit some ice. There’s a sense of the unknown.”

“I am quite passionate about the environment and climate change ... there is starting to be some movement there and it will be an increasingly significant political and social issue.”

2.3.5 Home-Close Actives

Home-Close Actives made up 13% of the New Zealanders surveyed. The following key characteristics differentiate them from other segments.

- Average age 51, female, Māori, live in rural or provincial areas.
- Have lower levels of income, education and health.
- Seek security.
- Prefer safer experiences.
- Like accessible, local and easy activities.
- Prefer comfortable, familiar and known activities.
- Take part in well-managed outdoor activities.
- Enjoy short walks, gardening, and leisure and indoor activities.

Home-Close Actives are more likely to be older, female and to live alone in provincial or rural areas. They are also more likely to have lower incomes, education and health than other segments and are less likely to take holidays. This segment included a higher proportion of Māori.

Most of the Home-Close Actives surveyed participated in outdoor activities (although to a lesser extent than other segments). The top three outdoor activities they participated in on at least a monthly basis were short walks (74%), picnics/barbecues (29%) and sightseeing (28%).

Home-Close Actives enjoy the companionship and connection with those close to them and do outdoor activities with adult family and friends. However, they may also need extra support as they may be dealing with health and accessibility issues.

Home-Close Actives appreciate the outdoors for fresh air, sunshine and quiet, and enjoy gardens and nature. They opt for accessible and low-cost options such as walking or driving around their neighbourhood or local parks. Flat paths and scenic areas with convenient parking and facilities close by suit them better.

The ethnographic phase of research delved more deeply to understand how Home-Close Actives participate in outdoor activities. A snapshot profile using a fictitious name is summarised below to bring this to life.

Valerie – 68 years, retired, European, female, empty nest, grandchildren, Hawke’s Bay

- Retired from a physically and mentally demanding job working in health services.
- Studies, paints, reads, gardens – enjoys learning.
- Believes in integrity, transparency and caring for others.
- Enjoys quiet and peaceful places and activities.
- Outdoor activities in the past were influenced by the needs of children’s sports activities.



Caption: Vegetable Garden
Photo: Valerie

“My idea of hell would be going to the Napier foreshore on a nice weekend. I do like a walk along there and I love the Art Deco buildings in Napier, but there are too many people. Too many kids on bikes and scooters; I can’t relax.”

“We are not hermits and on a nice evening we will walk to the park where it is nice and quiet. There is a lot of new development going on, so we track the progress, look at the gardens, say hello to the occasional cat.”

2.3.6 Other Things Actives

Other Things Actives made up 20% of the New Zealanders surveyed. The following key characteristics differentiate them from other segments.

- Average age 48, European, live in urban areas.
- Less educated, live in smaller households.

- Disengaged with the outdoors.
- Mostly do indoor and sedentary activities.
- Take part in some short walks and heritage activities.

Note: This segment was not fully explored in the qualitative phases of research so there is limited information on their needs and motivations.

Other Things Actives include all ages and genders but are more likely to be European and to live in urban centres. They are less likely to be educated and tend to have smaller households. They are disengaged with the outdoors, opting to spend more of their time indoors.

The quantitative survey indicated that they were the least active segment, but Other Things Actives still took part in some outdoor activities. Their top three outdoor activities were short walks (67%), picnics/barbecues (19%) and sightseeing (18%). However, they were less likely than all New Zealanders to do all of the activities, making them the most sedentary and least active segment. Preferred indoor activities included watching TV, listening to music and reading.

Although 45% of Other Things Actives surveyed had visited a cultural or historic heritage site at least once in the last year and 36% had swum in the outdoors, people in this segment tended not to be motivated to see new places or things.

Activities of moderate fitness levels appeal to this segment to maintain their health, but these activities need to be easy and simple with convenient access. Other Things Actives prefer to do any activities that are close to home. Socialising and connecting with others – especially family – are still important.

The Other Things Actives surveyed were more likely to declare lower levels of knowledge about biodiversity yet they also rated biodiversity in New Zealand as poor. In contrast to other segments, they were less likely to encourage wildlife or plant natives in their gardens. They were also less likely to believe that they could stop the decline of threatened species.

The ethnographic phase of research delved more deeply to understand how Other Things Actives participate in outdoor activities. A snapshot profile using a fictitious name is summarised below to bring this to life.

Dean – 48 years, professional, European, male, married, three boys in their teens, Christchurch

- As a busy professional, work and family demands are the primary focus.
- While not inspired by the outdoors, Dean does support his son's activities – driving them to sports, watching their cricket, taking them to sports events.
- Time-out is going to the gym, some gardening and beer with a mate.
- Relaxing on the deck working, chatting or drinking is his preference.



Caption: Relaxing On Deck

Photo: Dean

“... our middle boy didn’t want to play rep cricket this year, which is usually on Sundays and usually takes all day. So somehow, he managed to get into a coaching group that goes on 9.30 to 11.30 on a Sunday on the other side of town. So I spend the best part of an hour sitting on artificial turf talking to other parents waiting for this thing to finish.”

“One, I spend a lot more time sitting than I thought I did. And two, it is partially that time of year that when we are outside, we are sitting and socialising, we are not actually moving that much.”

3 Cultural perspectives

3.1 Māori perspective

3.1.1 Māori participation in outdoor activities

Note: The information presented in this section has been taken from the results of the quantitative survey, which sampled 369 Māori.

Enthusiastic and Home-Close Actives were more likely to include higher proportions of Māori (14% and 13%, respectively) than other segments. Māori were more likely than non-Māori to actively participate in outdoor activities at least monthly, especially water-based activities (Figure 17).

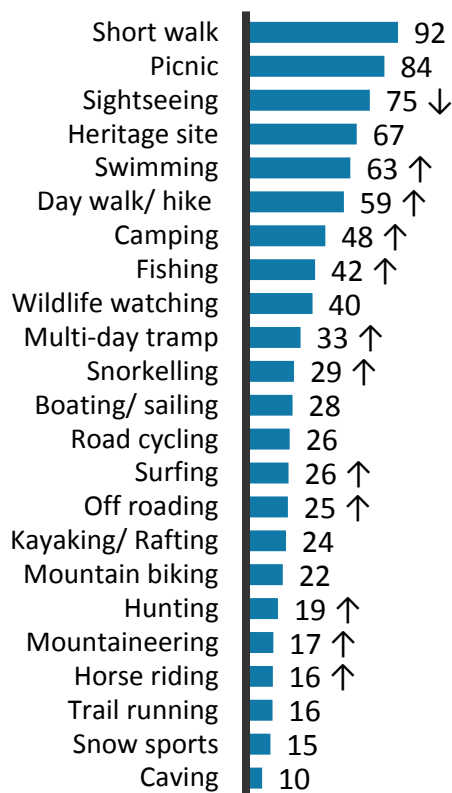


Figure 17. Māori participation in the New Zealand outdoors in the past year (%). Note: The upward and downward arrows (↑/↓) indicate higher and lower participation, respectively, by Māori compared with all New Zealanders.

Māori were more likely to rate family-friendliness, cellular coverage, accessibility and the availability of organised activities as important in their decision-making on where to visit. They were also more likely to report that they were prepared to travel 3 or more hours for outdoor day trips compared with non-Māori (33% and 24%, respectively), and said that they would use the outdoors more if there were more and better facilities and if it was more easily accessible.

Māori were also more likely than non-Māori to agree that there should be limits on visitors (international and local) at popular sites. They were more likely to say that they visit the outdoors less often than they used to due to crowding. While Māori rated the quality of New Zealand's natural environment and biodiversity as poor, they did believe they could take action and could participate in protective and restorative activities (40% compared with 32% for non-Māori) (Figure 18).

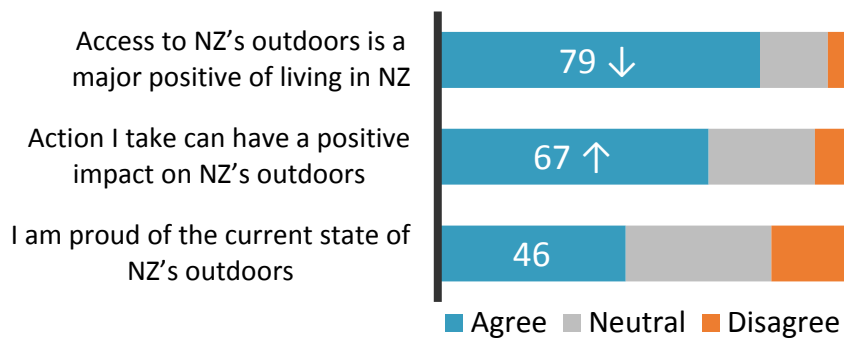


Figure 18. Level of agreement to various statements by Māori. Note: The upward and downward arrows (↑/↓) indicate higher and lower agreement, respectively, by Māori compared with all New Zealanders.

Cost was more likely to be a barrier to engaging in recreation and heritage activities in the outdoors for Māori (42%) compared with non-Māori (31%) (Figure 19).

Top four outdoor recreation barriers

- 42% - Cost too much to get there (↑)
- 37% - Prefer to do other things
- 33% - Finding things that fit in with lifestage
- 22% - Places not suitable for abilities

Figure 19. Top four outdoor recreation barriers to Māori. Note: The upward arrow (↑) indicates a greater barrier for Māori compared with all New Zealanders.

Māori were more likely than non-Māori to report having engaged previously (timeframe unspecified) in a public clean-up (49% and 35%, respectively) or taking part in a DOC volunteer project (23% and 15%, respectively) (Figure 20).

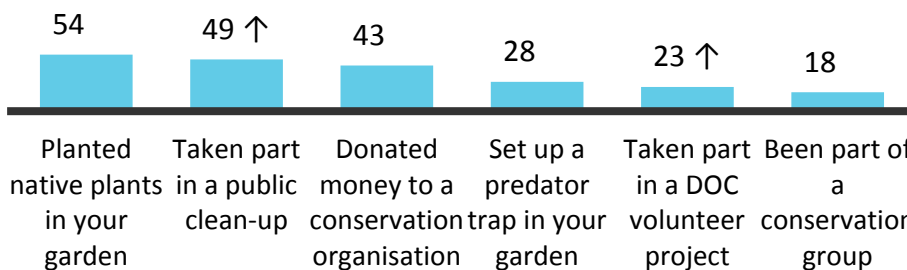


Figure 20. Percentage engagement by Māori in outdoor conservation activities. Note: The upward arrows (↑) indicate greater engagement by Māori compared with all New Zealanders.

3.1.2 What Māori said

Note: The qualitative phases that included Māori respondents were one Auckland focus group that combined Māori and Pasifika and one Auckland Māori ethnographic interview. Therefore, the sampling was very small compared with other ethnic groups so the results outlined below should be treated with caution (ie it cannot be inferred that all Māori have the same perceptions). In particular, given the urban focus of this sampling, these findings are less likely to reflect the perceptions of non-urban Māori.

Qualitative focus group interviewing showed that some Māori respondents had strong memories of and connections with the outdoors – especially growing up with extended family members, fishing, gathering/diving for kai and finding pounamu. For these respondents, participating in outdoor activities met several needs: recreation, cultural practices, food source, and spiritual connection with nature and species, as illustrated through the following quotes.

“... to be able to take my children to lakes and show them how to find pounamu and then take them home and show them how to make pounamu and have pieces around our neck – that is part of our heritage.” Female, Christchurch.

“Because that is how we [Māori] ... access play. You go out to the bush, you go out into the water, everywhere you go you have got crops and all those things that are activities ... they not only bring great satisfaction but you become self-sufficient and I think that is very important today.” Female, Auckland.

“Taking good care of our plants and animals because they are the ones that make the region richer.” Female, Auckland.

Some Māori respondents expressed concern about the environment, dying forests, polluted waterways and tourism pressures. These respondents expressed their belief that collective effort and responsibility is important to improve the New Zealand outdoors.

“You have to manage the use, so it is not overused. To me it comes down to, I am not fluent in Māori so I don’t know what the Māori equivalent is, but it is the guardianship isn’t it? We are all passing through and the more we can look after what we have got. It’s also passing on to the younger generation the importance of, there is just so much rubbish that people throw out of cars, people just don’t seem overly concerned about some of their actions these days.” Male Enthusiastic Active, Auckland.

3.2 New migrant perspective

3.2.1 New migrant participation in outdoor activities

Note: New migrants were defined as people who arrived in New Zealand in 2000 or after and tended to be younger. The information presented in this section has been taken from the results of the quantitative survey, which sampled 503 new migrants, and the qualitative phases, which included one Auckland qualitative focus group of new migrants that arrived more than 1 year and less than 5 years ago and one Wellington new migrant ethnographic interview. There may be cultural bias in the data, with new migrants and Asians having a tendency to agree when asked survey questions.

Many new migrants didn’t grow up with a ‘walking in nature’ lifestyle, so New Zealand outdoor activities compete with indoor activities for these people. The results of the qualitative focus group and interview indicated that the children of new migrants take the lead in encouraging their parents to head outdoors and try new activities such as camping, cycling, walking in nature and picnicking/barbecuing.

New migrants explore new things and places as part of discovering New Zealand and what it is to ‘be a Kiwi’. They travel to popular destinations, suggesting that their travel patterns may align more closely with those of internationals. They’re younger and more likely to be of Asian ethnicity (almost half).

While cost and access can be an issue, Auckland’s new migrants said they will travel to get to locations with walks and beaches. However, they tended to be unprepared for winding roads and changeable weather, highlighting a need for safety guidance. They were more likely to be prepared to travel 3 plus hours for an outdoor day trip (31% compared with 24% of all New Zealanders).

New migrants seemed underwhelmed by heritage sites, which they considered to be either not old enough (compared with international heritage sites) or not developed enough to be meaningful (ie lacking sufficient storytelling and signage information).

People in the Enthusiastic, Stimulation and Social Active segments were less likely to be New Zealand born (64%, 67% and 66%, respectively) than all New Zealanders, indicating that they are likely to have migrated to New Zealand at some stage. Enthusiastic and Stimulation Actives were more likely to be Asian (18% and 25%, respectively).

Annual participation was higher for new migrants than for all New Zealanders across most outdoor activities (Figure 21). The qualitative results showed that new migrants were interested in trying new things and visiting new places in a relatively risk-free and accessible natural environment.

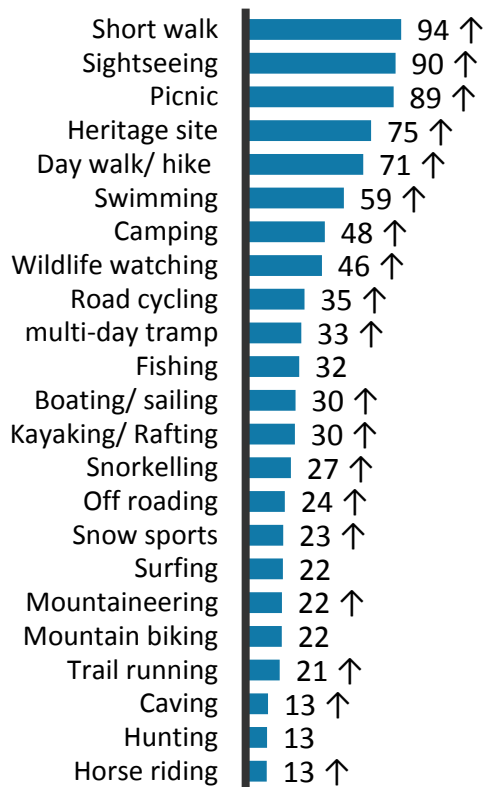


Figure 21. Participation by new migrants in the New Zealand outdoors in the past year (%). Note: The upward arrows (↑) indicate higher participation by new migrants compared with all New Zealanders.

Cost was the top barrier to engaging in recreation and heritage activities in the outdoors for new migrants, and they were more likely to say that cost was a barrier than all New Zealanders (Figure 22). They were also more likely to say that they didn't know where to go.

New migrants were less likely than others to actively participate in conservation activities such as planting natives, public clean-ups and predator trapping (Figure 23).

Top four barriers preventing engagement

- 38%** - Cost too much to get there (↑)
- 31%** - Finding things that fit in with lifestage
- 30%** - Prefer to do other things
- 26%** - Don't know where to go (↑)

Figure 22. Top four barriers preventing new migrants from engaging in heritage and recreation activities in the outdoors. Note: The upward arrows (↑) indicate greater barriers to new migrants compared with all New Zealanders.

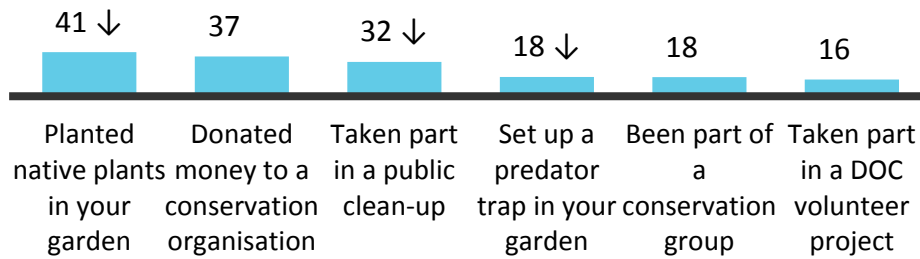


Figure 23. Percentage engagement of new migrants in conservation activities. Note: The downward arrows (↓) indicate lower engagement by new migrants compared with all New Zealanders.

3.2.2 What new migrants said

The following quotes help to illustrate the perspectives of some new migrant respondents from a qualitative focus group with Auckland-based new migrants.

“... One word - beautiful. The way they keep nature so good, there is no deforestation or something like that.”

*“**New Zealand is a tourist attraction because of its nature.** The colour of the sea is blue and this is so attractive for everyone who wants to come ... over here. Last week we went to Mt Ruapehu and that was the first time I felt snow and I was super excited.”*

“Health is important. Me and my husband never used to go for a walk but after a period of time we had a feeling we are putting on weight ... We get more bonding. Exploring new things.”



“Actually we had a plan, they suggested a tree walk and we should try it ... It was so good. Everything was so good because it was such an experience.” **Female Enthusiastic Active, Wellington, migrated from India, speaking about Redwood Forest, Rotorua.**

“The only thing I would say are the really windy roads are just crazy. It doesn’t put me off, my partner drives, I don’t feel that comfortable but she is a more confident driver.” **Male new migrant, Auckland Focus Group.**

4 Considerations and concerns

4.1 Decision-making

4.1.1 Important considerations when choosing where to visit

Survey respondents were asked, regardless of how often they visited the outdoors, how important a range of factors were when choosing where to visit. The results indicated that the following considerations were most important (see Figure 24).

- Safety for themselves or their family (78%) and the presence of useful facilities (69%) were the top considerations for all New Zealanders. It is not surprising that safety is such a key concern, as if safety needs are not being met, 'higher' needs such as social needs are parked. Home-Close Actives were more likely to be concerned about their own safety and security (89%).
- The cost to stay (66%) and cost to get there (63%) were also important. In particular, the under 30s rated these as the second and third most important considerations behind safety, and Social Actives, who tend to be young families, rated the cost to stay as the second most important consideration behind safety.
- The time it takes to get there (55%) and a family-friendly location (54%) were also important for over half of all New Zealanders. In particular, the time it takes to get there was more important to Social Actives than all New Zealanders, while a family-friendly location was rated the third most important consideration for Home-Close Actives, possibly because they rely on family to get out and about.
- Quiet/tranquil and not crowded places were equally important (63%). Both of these mattered more to older people - 45 plus and especially 60 plus - and quiet/tranquil was the top consideration ahead of safety for Mindful Actives.

Survey analysis revealed that four key factors underly decision-making: accessibility, cost, family-friendliness and quietness/tranquility. Accessibility is the most important of these and mostly comprises the importance of access for people with different disabilities, access by public transport, regular visitors and structured activities being available. Cost is the second most important and mostly comprises the costs to get to and stay at activities and the time it takes to get there. Next comes a more family-related component, the core of which is made up of the importance of safety, family-friendliness and useful facilities. And the final component is mostly related to the importance of quiet and a lack of crowds.

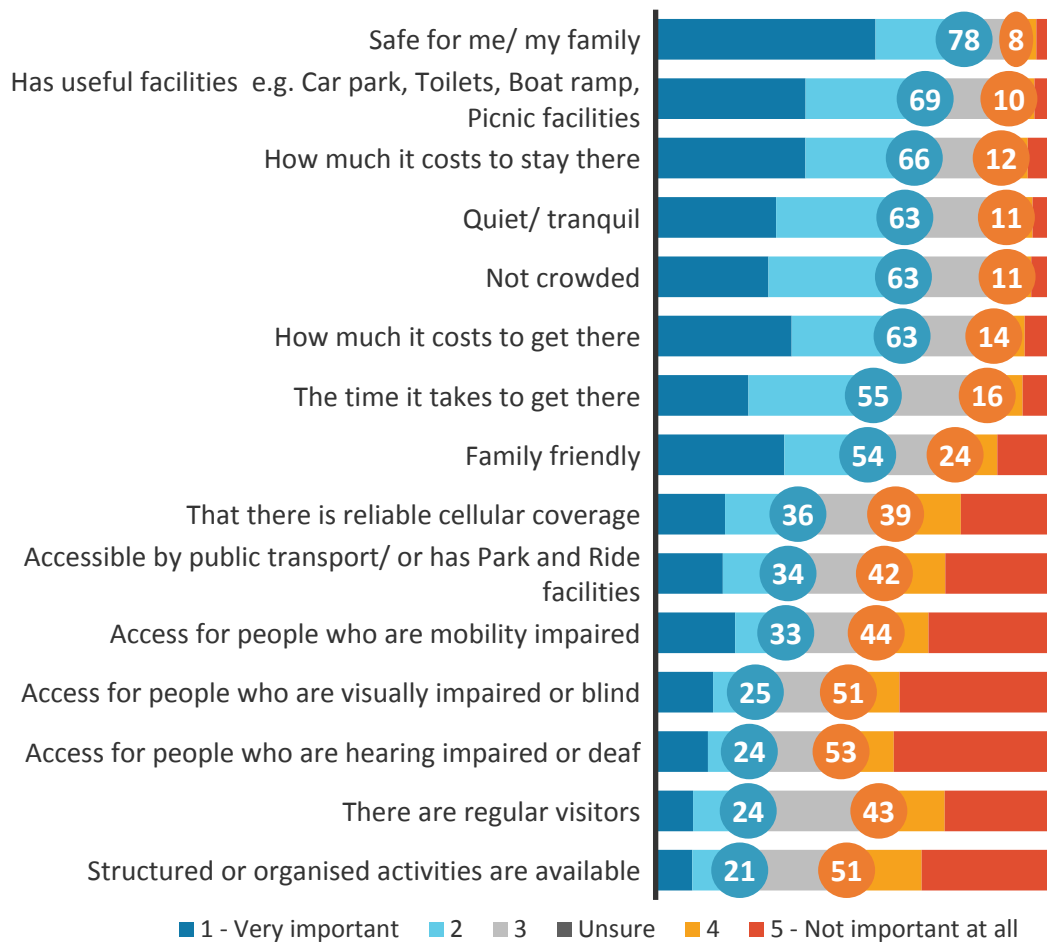


Figure 24. Percentage of responses to Q3a: 'Regardless of how often you visit the outdoors, how important are each of the following when choosing where to visit?' (n = 3,837).

4.1.2 Decision-making by life stage

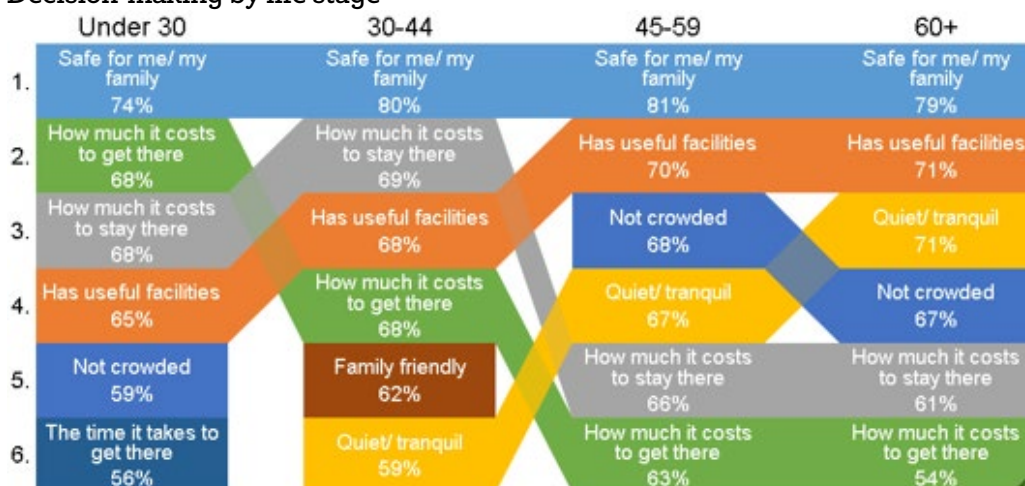


Figure 25. Top six most important factors when choosing where to visit by age group (n = 3,837).

The relative importance of the key decision-making factors was assessed for different age groups of New Zealanders (see Figure 25). Safety was the most important factor across all ages. The cost of getting to places was the second most important factor for the under 30s showing its importance to this age group, whereas this was the least

important factor for people who were 45 plus. Facilities, not being crowded and being quiet/tranquil were more important for the 45 plus group compared to the 30–44 and under 30 groups. This reinforces the idea that some places may have a stronger appeal to specific age groups and so may need to be managed in a way that meets their particular needs (eg through the provision of seating or quiet spots).

4.1.3 Decision-making by segment

The relative importance of the key decision-making factors was also assessed for the different customer segments (see Figure 26). The results clearly showed that not all segments were the same. For example, unlike all other segments, Mindful Actives did not rank safety as the most important factor (although it was still in the top three). Similarly, useful facilities were of less importance for Mindful Actives than for the other segments, who rated this as the second or third most important factor. Instead, Mindful Actives rated quiet/tranquil as the most important factor and not crowded as second most important.

Home-Close Actives ranked family-friendly and access for people with mobility issues in the top four most important factors, which differed from the other segments. The cost of activities and the cost of getting to places was important across most segments. However, Stimulation Actives appeared somewhat unique in that they did not place any particular importance on any of the factors, suggesting that they may put less conscious thought into their decision-making.

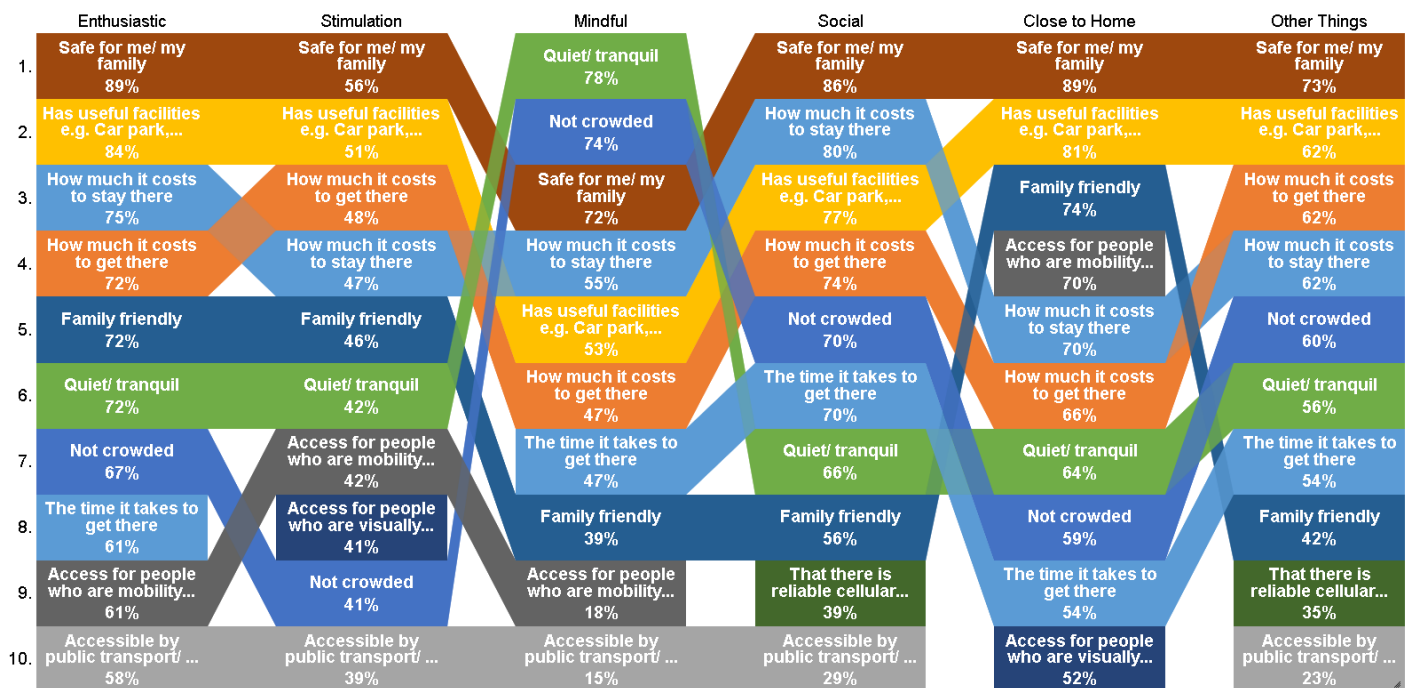


Figure 26. Top 10 most important factors when choosing where to visit by segment (n = 3,837).

4.1.4 Deeper insights into decision-making

A decision tree was developed by DOC from the qualitative phases of research to provide an overview of the considerations people weigh up when making decisions about participating in outdoor activities (Figure 27). When interpreting this, it should be noted that the scope of the outdoors is wide – it includes national parks and protected areas, local parks and reserves, as well as neighbourhoods and home gardens. This decision tree shows how layered decision-making is for people depending on their needs and motivations as well as their considerations and concerns. The following key points can be taken from this.

- Needs and motivations are the starting point and shape people's decisions on the types of activities they do. Thus, Mindful Actives seek to escape to the outdoors for quiet and tranquil experiences, Social Actives seek to connect in the outdoors through sharing and learning experiences, Enthusiastic Actives seek shared stimulation in the outdoors through diverse and stimulating experiences, Stimulation Actives seek challenge in the outdoors through strenuous and intense experiences, Home-Close Actives seek security in the outdoors through safe and comfortable activities, and Other Things Actives are not particularly engaged with the outdoors. Therefore, the needs and motivations are key factors that influence who people go with, where and when they go, what they do, and how they do it.
- Routine activities go through a different decision-making process because considerations and concerns for these familiar or even habitual activities will have been worked through over time. For example, it is already known from past experience whether there are appropriate facilities and the popularity of the location. The specific activity and seasonality will also be considered.
- Novel activities require a lot more planning as they are often less familiar and people are stretching outside what they know. Therefore, depending on their level of outdoor experience, people are likely to consider their fitness ability, age and mobility, interests and preferences, the popularity and accessibility of the place, and whether they or others need to consider disabilities. People will also consider available facilities for different experiences and the costs of getting to and staying at places.
- Assessing the feasibility of heading into the outdoors has commonalities across routine and novel activities, with safety, time, costs, location and weather being important considerations for both. Much of this may already be known for routine activities, though time and weather may need to be assessed on the day, whereas some of this is unlikely to be known for novel activities, so more planning and layered decision-making is required.

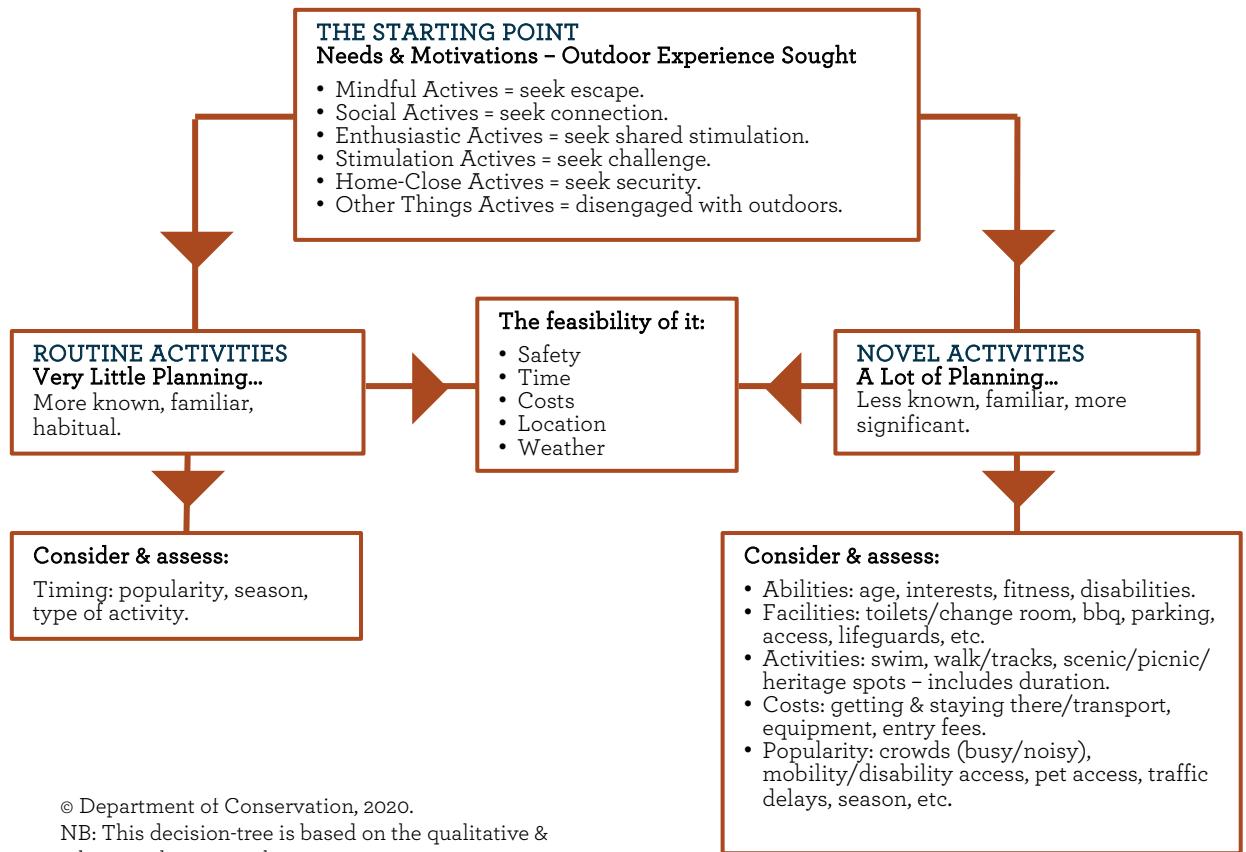


Figure 27. Decision tree showing the considerations people weigh up when making decisions about participating in outdoor activities.

4.2 Barriers to engaging in outdoor activities

This section focuses on the key barriers New Zealanders raised to engaging in recreation and heritage activities in the outdoors.

About one-third (34%) of those surveyed said they preferred to do other things in their free time, while similar proportions (32% respectively) indicated that the cost of getting to places was too high and it was hard to find activities that fitted their life stage (Figure 28). This especially applied to families with younger children. In addition, Aucklanders were more likely to identify traffic delays and public transport access as barriers to engaging in activities in the outdoors.

Survey analysis indicates there were three main underlying barriers, which can loosely be interpreted as lack of connection to places and people, crowding, and lack of suitability. The first of these mainly consists of not having anyone to do the activity with, not knowing where to go and the cost. The second grouping relates to other people being a barrier to engaging in outdoor activities, with the place being too crowded and traffic being too heavy. The final grouping relates to the suitability of the activity, including places not being suitable for physical or sensory abilities, the required facilities not being present and difficulty finding activities that fit in with a particular life stage.

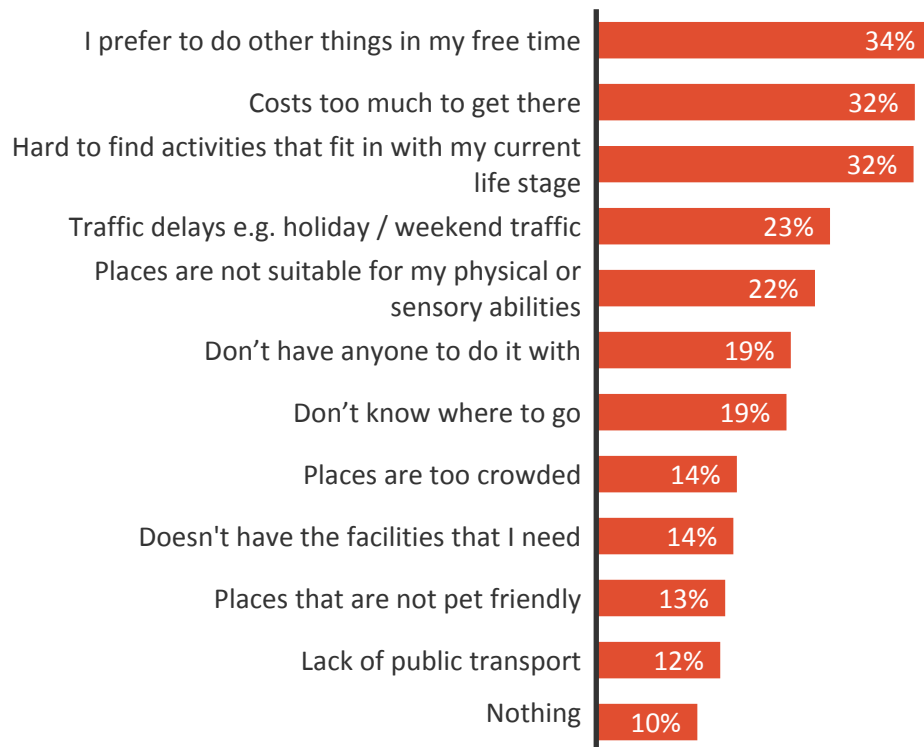


Figure 28. Percentage of responses to Q1: 'Which of the following prevents you from engaging in recreation and heritage activities in the outdoors?' ($n = 3,837$; multiple response question).

An analysis of the key barriers according to age group highlighted the following points (see Figure 29).

- For the under 30s, the most common barrier was the cost to get there, followed by preferring to do other things and not knowing where to go. Overall, this age group appeared to report slightly more barriers than the other age groups.

- Amongst the 30–44 year olds, the most frequently reported barrier was the challenge of finding activities that fitted in with their life stage (which could also include children’s abilities).
- For those aged 45–59 years, the top barrier was the preference to do other things, with their current life stage being less likely to be a barrier (possibly due to them being less likely to have young children).
- People aged 60 plus most frequently reported finding places that were suitable for their physical or sensory abilities and that fitted in with their life stage as barriers.
- For the two older age groups (aged 45 plus), not knowing where to go was less likely to be a barrier than it was for the younger groups.

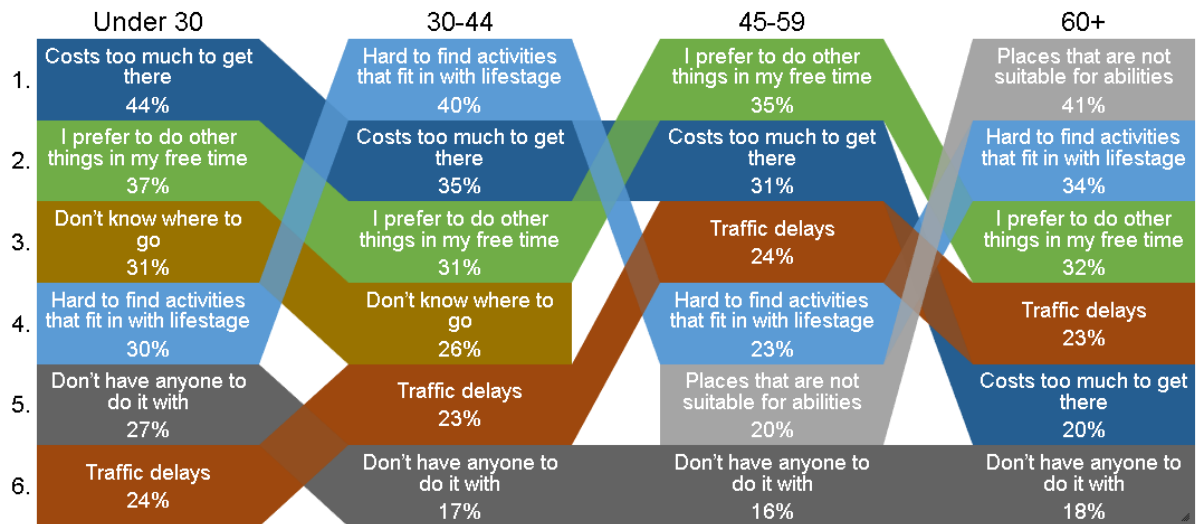


Figure 29. Top six most commonly cited factors for preventing engagement in recreation and heritage activities in the outdoors by age group ($n = 3,837$; multiple response question).

Table 2 compares the key decision-making factors, as well as barriers (in order of importance), for younger and older New Zealanders.

Table 2. Comparison of the key decision-making factors and barriers for younger and older New Zealanders.

	Younger	Older
Choosing where to go	<p>Safety</p> <p>Cost</p> <p>Useful facilities</p>	<p>Safety</p> <p>Useful facilities</p> <p>The quiet</p>
Barriers	<p>Cost</p> <p>Prefer to do other things</p> <p>Don't know where to go</p>	<p>Places not suitable for physical/sensory needs</p> <p>Suitable with life stage</p> <p>Prefer to do other things</p>

4.3 Improving the outdoors

When New Zealanders were asked how the outdoor experience could be improved, the following key points were highlighted.

- Information about the time/duration of the activity/walk (79%) and the required ability (75%) were important for most respondents once they reached their destination, followed by signage highlighting key information about a place (74%) or describing historic sites and stories in the area (71%).
- Providing interesting things to do and see based on knowledge from locals was also seen as important (58%), particularly amongst Māori (65%) and Pasifika (66%).
- A mobile app that highlights things to stop and see had modest support, with 30% saying it was important. Younger respondents (under 30s), Aucklanders, Māori, Pasifika, Asians and those who were highly engaged in outdoor activities were more likely to indicate that this was important.
- Easier access, more facilities and better maintained facilities would encourage some respondents (37-41%) to use the outdoors more, particularly those who were younger, Asian, already active and had young children.
- When prompted, 14% of respondents said there were additional services or facilities they would like to have when visiting the New Zealand outdoors. The most frequent request was more and better maintained facilities, particularly toilets, rubbish bins and access to drinking water. More information, such as better signage and track information, were also frequently mentioned by those who wanted additional facilities and services.

5 Safety in the outdoors

When respondents were asked to what extent they felt safe in a range of situations, there were several key findings (see Figure 30).

- People feel safest in the outdoors with others around. Four out of five New Zealanders (82%) reported feeling safe visiting their local park, two-thirds (71%) reported feeling safe participating in outdoor activities with others, and two-thirds (71%) said they feel safe when their kids are with them.
- People generally feel less safe doing water-based activities. Over half (54%) of those surveyed said they feel safe when tramping/hiking in the bush compared with only 37% when swimming at beaches with no lifeguards.
- Urban dwellers generally feel less safe than rural or provincial dwellers, and New Zealand Europeans generally feel safer than other ethnic groups. For Māori, 41% of respondents said they felt safe swimming in isolated lakes or waterholes, while new migrants generally felt less safe in the outdoors (possibly due to them being less familiar with New Zealand outdoor activities and environments).

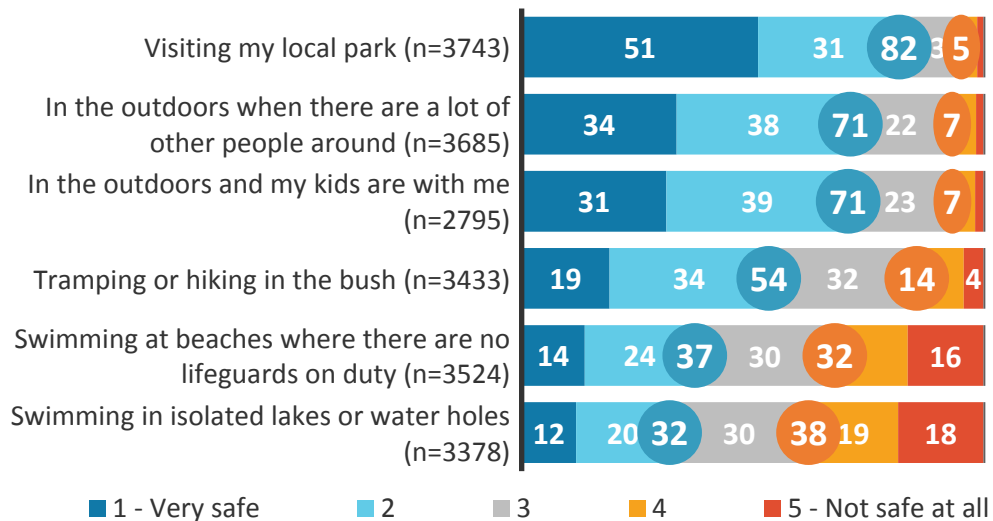


Figure 30. Percentage of responses to Q4a: 'To what extent do you feel safe with the following?' (sample sizes vary as respondents who replied 'not applicable' or 'unsure' were excluded).

The qualitative research indicated that those who engage frequently in outdoor activities are likely to feel safer, while those who don't are likely to feel less safe. The following quotes bring to life people's level of confidence around water-based activities.

"We were out at Bethells Beach Sunday ... I just like going out there to see the wild west. It's not tame, the west coast ... Probably a month ago we were down at Cathedral Cove fishing off the rocks, we do it a lot, land based because we have no boat." Māori or Pacific Island male, Auckland.

"I got rid of being scared. I am scared of waterfalls and everything ... My husband is also afraid of water. Fear is a barrier for us." Female Enthusiastic Active, Wellington, migrated from India.

5.1 What safety and risk look like

Note: This overview does not provide an overarching comprehensive map for safety and risk in the outdoors - it relates only to learning from the customer segmentation research.

Analysis by DOC of the results from the qualitative phases of research showed that New Zealanders can be categorised into different groups according to their perception of risk (Figure 31).

- New migrants have the least confidence with risk because the New Zealand outdoors is unfamiliar and unknown to them. Therefore, there is a tendency for them to avoid some outdoor activities such as water-based activities (because they may not know how to swim) and walking in nature activities like hiking (because this is not something they have grown up with).
- Fun seekers (in this context), who are broadly identified as younger and often urban New Zealanders who are relatively new to outdoor experiences, seek a shared and social experience with others. Decision-making may be spontaneous so they tend to be less prepared for being in the outdoors in terms of the duration of activities, weather conditions, terrain challenges, etc. They assume that much of the outdoors is safe and that if they have difficulties there will be someone around to help them. Essentially, they tend to be unaware of the level of risk involved with activities - especially in the remote outdoors.
- Young families tend to plan and prepare for activities in the outdoors, taking adequate clothing and food to adjust to changing circumstances (eg weather conditions and time). Parents take a pragmatic approach to balancing decision-making for activities with an awareness of their children having a mix of interests and capabilities (related to age).
- Adult families have often built up years of experience and confidence participating in outdoor activities. They will plan and prepare, although this is to a limited extent and they may at times over- or underestimate the level of risk involved based on experience. They are more willing to give new things a go in diverse locations.
- Challenge seekers tend to opt for strenuous activities in remote locations. They have a high level of skill and fitness and are more likely to have the expertise needed to understand how to approach challenging situations in the outdoors. They will be aware of the risks involved and thoughtfully assess how to proceed. They tend to plan and prepare thoughtfully, checking equipment and supplies, weather conditions, and the time required.

Perceptions Of Risk

UNCONFIDENT WITH RISK	UNAWARE OF RISK	AWARE/RESPONSIVE TO RISK	CONFIDENT/JUGGLE RISK	CONFIDENT/REDUCE RISK
<p>New Migrants</p> <ul style="list-style-type: none"> • Beginner • Unfamiliar • Avoid activities • Fear unknowns 	<p>Fun Seekers</p> <ul style="list-style-type: none"> • Novice • Unplanned • Unprepared • Assume it's safe • Shared experience • Expect guides/lifeguards 	<p>Young Families</p> <ul style="list-style-type: none"> • Pragmatic • Planned • Prepared • Balance activities for mix ages/interests • Aware of dangers (rips, rockfalls, etc.) 	<p>Adult Families</p> <ul style="list-style-type: none"> • Experienced • Diverse locations • Plan & prepare up to a limit • Will give it a go • May over-estimate skill & under-estimate risk 	<p>Challenge Seekers</p> <ul style="list-style-type: none"> • Expert (skill & fitness) • Remote locations • Aware/assess risks • Plan & prepare thoughtfully • Check details like weather/time etc.

© Department of Conservation, 2020.
 NB: This analysis is based on the qualitative & ethnographic research output.

Figure 31. Categorisation of New Zealanders according to their perceptions of risk.

The following quotes taken from focus group interviews bring to life people's level of comfort and confidence around safety and risk in the outdoors.

"It depends once again on the timing - how long does it take? Most tracks will have an estimated walk time. And whether water is involved. My kids were more than capable when they were younger of swimming in a pool, but open water would be a whole other matter." Female parent, Christchurch.

"I think we need to think about as well how many people drown at beaches and get caught in rips. Go in boats and dinghies and don't take life jackets and just don't think that the weather might change. I would definitely agree that the accessibility can be detrimental in some ways." Female young person, Christchurch.

"I went to the Tongariro Crossing. It is beautiful. I have done it five times; I try every year to go. I went there once and it was September, and one of the guys said to me, 'Where are you going? You are going to freeze.' I wasn't prepared. Even people who don't know you, try and tell you and say you shouldn't." Male new migrant, Auckland.

"Ordinarily you face the same risks going about your daily business but the consequences of that event are higher if you are in a remote area because you are away from help or you don't have a facility there. So, it's just about being prepared." Male, general public, Auckland.

The more people engage with the outdoors, the more confident they become in their ability to identify and manage risk. Education campaigns on being prepared when active in the outdoors could make a difference and would have the dual role of educating as well as encouraging more New Zealanders to be active in the outdoors.

6 Life stages and abilities

6.1 Younger age groups

Note: The qualitative information presented in this section was sourced from one group discussion with younger people in Christchurch.

One qualitative focus group was conducted with ‘younger people’ – those aged 18 to 24 years. People in this age group squeeze in outdoor activities and experiences around their busy schedules and available resources (cost, transport, equipment, clothing, food, etc.). Their decision to head into the outdoors is often spontaneous, so they may not be adequately prepared for the conditions (eg weather, terrain, duration).

6.1.1 Key qualitative highlights – younger people

→ ***Outdoor activities are more diverse.***

Examples include:

- fitness (eg gym, running, cycling, mountain biking)
- team sports (eg basketball, hockey, cricket, tennis)
- leisure/adventure sports (eg surfing, swimming, skiing, snowboarding)
- walking (eg short to long walks – every day, weekends, holidays)
- socialising (eg road trips, cafes, movies, board games).

Note: Younger people mostly participate in activities with family and close friends, so they may also be able to share the cost of getting to places and doing activities.

→ ***Schedules and resources limit participation.***

- Time is compressed due to study or work commitments.
- It is costly to travel long distances and do adventure activities.
- Access to suitable transport can be limited (eg no vehicle or no four-wheel drive).

→ ***Growing up in the outdoors is influential.***

- Those who have grown up in the outdoors have higher adult participation.
- Family outdoor excursions are influential (eg camping, hiking, fishing, boating).
- Being in the outdoors becomes a lifestyle choice in adulthood.

Note: Safety is interpreted as being prepared (adequate clothing and equipment), being fit and having the skill to handle diverse situations. For younger people, decisions to go into the outdoors are often spontaneous so they are not always prepared or skilled.

“We decided in 15 minutes and I went with no jumper and in Queenstown it was minus 2 and it was freezing and I just had a t-shirt.” Female younger person, Christchurch.

6.1.2 Key quantitative highlights – under 30s

It was found that under 30s:

- engaged in outdoor activities more often (at least monthly) than older people
- were more likely to go into the outdoors with friends (58%) than older people
- were constrained by costs to get to outdoor activities and stay there
- often didn't know where to go
- were more likely to say they could personally help stop biodiversity decline.

6.2 Younger families

Note: Much of the information in this section was sourced from qualitative focus groups with parents in Christchurch (1), a few from general public focus groups (who had families) in Auckland (2), and ethnographic interviews (7).

Younger families include children aged up to 17 years. There were three key findings of the research for this group.

- Those with children aged under 13 years were more likely to say they would be more active in the New Zealand outdoors if it was more easily accessible, there were more facilities and facilities were better maintained (47-48%) than those with teenage children (35-40%).
- Finding new and interesting ways to keep children and teens engaged is a key focus in the outdoors. Parents with young children (mostly under 13 years) were more likely to go on picnics at least monthly (48%) than those with older children (38%). Analysis of the barriers to engaging in recreation and heritage activities revealed that almost two-thirds (63%) of respondents with mostly preschool-aged children and almost half (47%) of those with primary school aged children said they found it hard to find activities that fitted in with their life stage.
- Some parents believed that being in the outdoors helps their children to develop positive 'values and standards' through diverse activities and new experiences. This applies to both the 'great outdoors' and the urban outdoors, as reflected in the following quote.

"[The outdoors] is important because with two kids if it's raining they drive you up the wall ... spring and summer is a much nicer time in my household where we can go outside and walk the dog, go up to the local school, go to the local park." Male, general public, Auckland.

6.2.1 Key qualitative highlights

→ *Engaging children or teens is a key focus.*

This can include:

- doing outdoor activities together to stay connected as a family - *"Time to talk"*
- camping, road trips, cycling, walking places to do things (eg river, ocean, lake)
- supporting children or teens with sports (eg cricket, basketball, triathlon)
- finding new places/things/events to do - discovery, learning, enjoyment
- taking part in activities that suit varying ages and interests as well as confidence levels - safe and suitable activities for young children and interesting activities for teens; parents are always on the look-out for new ideas
- participating and socialising with other families via outdoor activities to mix it up.

→ ***Weekdays and weekends are busy juggling multiple commitments.***

Young families:

- spend time in the outdoors juggling around children and teen sports or arts activities
- make the most of weekend road trips by jamming in multiple outdoor activities
- often make spontaneous decisions if there's time and the opportunity.

→ ***Parents are shaping the next generation's outdoor participation.***

- Some parents actively motivate children and teens to build connections with the outdoors, while others are more passive, allowing their children's and teens' activities to shape their own time in the outdoors.
- Some parents try to influence or instil social values through volunteer activities, caring for the environment, reducing waste and community participation.

6.2.2 Key quantitative highlights

- One-third (33%) of adult New Zealanders engaged in outdoor recreation and heritage activities with children. This includes school-aged children, preschool-aged children and/or teenagers.
- The life stage affected whether children were included. Those aged 30-59 years were more likely to go with children (45%), and 30-44 year olds ranked being safe for the family, having useful facilities and being family-friendly among the top five most important factors.
- Those who said they usually did outdoor activities with children rated family-friendliness as much more important in decision-making than those who did not (76% and 43%, respectively). Māori were also more likely to rate this as an important factor.

6.3 Older people

Note: The information in this section was sourced from one qualitative focus group in Christchurch, four ethnographic interviews and, where relevant, the quantitative survey data. Overall, the qualitative phases included people from 50 to 80 years, while the survey data highlight key differences for older people aged 60 plus.

Older people find the outdoors beneficial for fitness, health and fresh air. However, a lack of availability of age-appropriate activities with useful facilities and mobility access prevents some participation.

"I find at this age you can't put a pack on your back like you used to and it really does limit you because your hips ... your knees are sore."

"I like to go walking. I like to explore new walking tracks and hiking, cycling. I am pretty energetic."

6.3.1 Key qualitative highlights

→ ***A shift in life stage allows the focus to shift to self.***

- Older people have less responsibility of raising children but are still busy juggling work, family activities, hobbies and interests. Older people said that they participate in outdoor activities more spontaneously than they did in the past - they have shifted their focus towards fulfilling personal needs and wants.

- Often those who were active when younger are keen to remain active as they become older, with activities including cycling, hiking, camping, fishing, etc. – and they now have more resources and time available.
- Older people are interested in heritage sites, often visiting them on road trips. Good signposting, local connections and compelling stories spark interest.
- Those who are less active are more focused on the quiet and solitude of the outdoors. Some older people are now responsible for caring or socialising with elderly parents, which limits their participation in outdoor activities.

→ ***Many are transitioning to less strenuous activities.***

- Access to facilities is an issue for older people who are mobility-challenged.
- Safety-conscious older people check access, facilities and weather before heading out.
- Many older people said that they have moved to more leisurely activities, such as road trips, short walks, bowling, visiting heritage sites and museums, and gardening. Some are also involved in community volunteering activities.

6.3.2 Key quantitative highlights

- New Zealanders aged 60 plus engaged in outdoor activities less than younger people, with the exception of bird and wildlife watching, which 12% of older people took part in at least monthly (equal to younger people).
- Those aged 60 plus were more likely to engage in outdoor activities on their own (27%) than younger people (18%) and less likely to go with friends (43%) than younger people (58%).
- Key barriers for those aged 60 plus included finding activities that suited their abilities or fitted their life stage. Those older people who considered useful facilities, access for the mobility-impaired, time to travel and public transport to be important were less likely to be engaged with the outdoors. Therefore, addressing these concerns may support older people to increase their participation in outdoor activities.
- Aside from safety for themselves and family, the provision of useful facilities and being uncrowded and quiet/tranquil were important for those aged 60 plus.
- People aged 60 plus were more likely than all New Zealanders to agree that the preservation of outdoor places (74%) and heritage sites (65%) is one of the most important issues facing New Zealand today. They were also more likely to have undertaken a range of biodiversity actions previously, including encouraging wildlife, planting native trees and setting predator traps in their own gardens (83%, 57% and 36%, respectively), and were more likely to have reported donating to a conservation organisation (41%) and making a submission to the Government (17%).

6.4 Implications of these differences for conservation

These differences between the life stages mean that people in different age groups can have very different mindsets and decision-making processes. Actively engaging with the outdoors at an early age affects young people's future participation, and younger people and young families are open to doing their bit to care for the environment, biodiversity and ecology. However, many older people are well-resourced and time-rich, so this life stage has potential to contribute to volunteer activities, which could offer the added benefit of supporting older people to be more active in the outdoors.

6.5 Impairments

Among the survey respondents, 16% self-identified as being disabled or said they were impaired and had difficulty seeing, hearing or walking.

Access was an issue for those with disabilities, as well as for those accompanying people with disabilities, as it influences decisions on where to go and what to do. In particular, having access to public transport was important to 34% of respondents when choosing where to visit, some of whom also identified access considerations for impaired people as being important when choosing where to visit (see Figure 32). This included access for people who were:

- mobility impaired – 33% important
- visually impaired or blind – 25% important
- hearing impaired or deaf – 24% important.

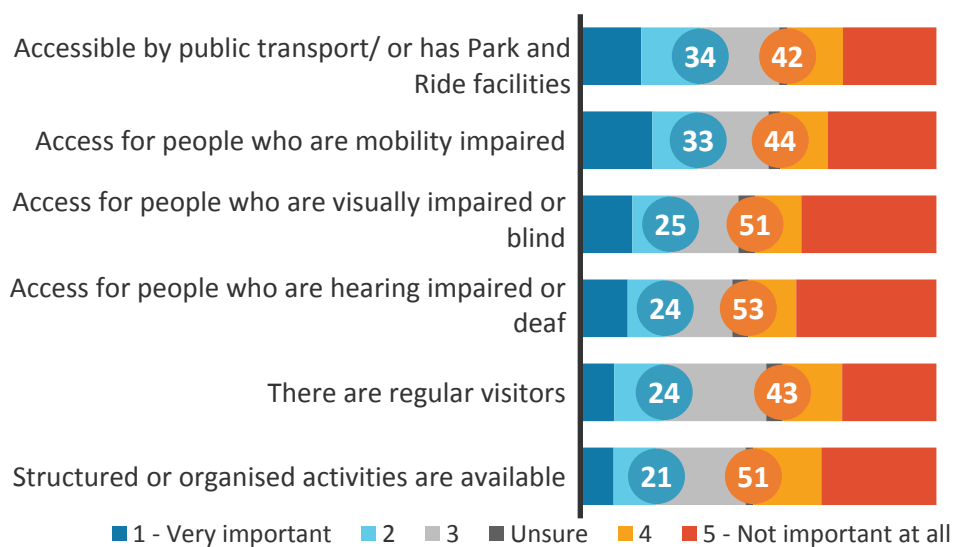


Figure 32. Importance of accessibility to survey respondents ($n = 3,837$).

The following quotes from the qualitative phases of research bring to life the issues people face around access for those with mobility or impairment issues.

“Talking about accessibility, accessibility for people who face physical challenges [would be good]. Whether it was a wheelchair versus a zimmer frame or walker wheels. Access to facilities that were like that.” Older male, Christchurch.

“And some of the sites don’t have that kind of access for someone who needs mobility ... I know my mum uses a walker so that kind of access. I know it was a hiking thing but having the ability to be able to sit in some places. I can walk but I can’t walk far for very long and I need to be able to sit. I don’t use a walker or anything but I don’t have a portable seat. My mum does. I do think in general having access to be able to do what you want in the outdoors within reason was very important for all of New Zealand.” Female, general public, Auckland.

7 Cultural or historic heritage sites

7.1 Heritage participation

Note: The interpretation of what constituted a cultural or historic heritage site was left to respondents, so it likely covered a breadth of sites, such as monuments, historic buildings, marae and archaeological sites. These may have been privately or publicly owned and managed and so were not limited to DOC-managed sites.

Two-thirds (66%) of the New Zealanders surveyed said they had been to a cultural or historic heritage site in the past year, and almost half (47%) said they had visited such a site at least twice a year (Figure 33). Visiting a cultural or heritage site was the fourth highest outdoor activity in the last year (Figure 34).

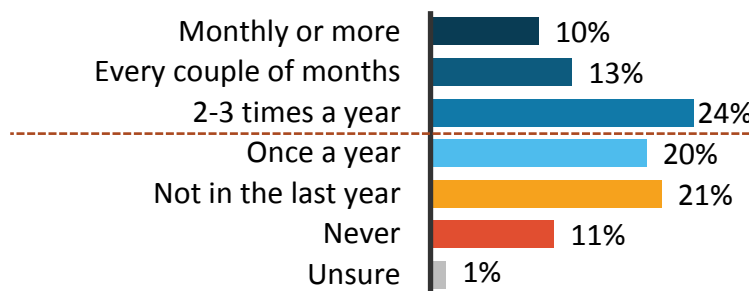


Figure 33. Percentage of respondents who had visited a cultural or historic heritage site in the last year or so ($n = 3,837$).

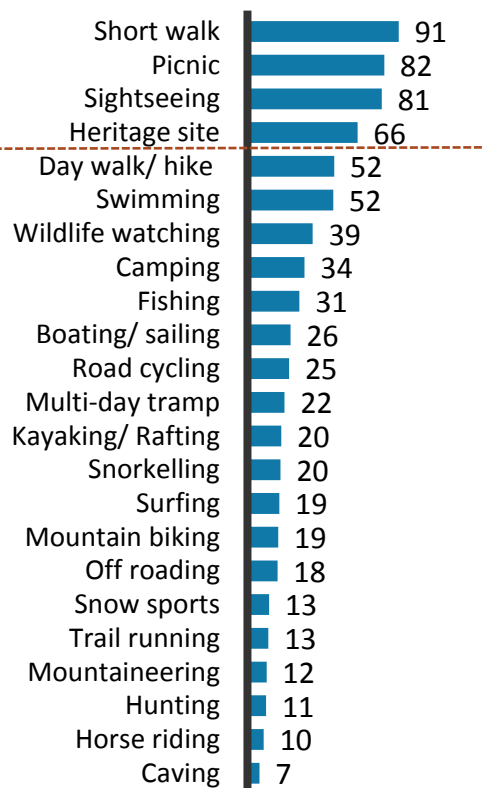


Figure 34. Percentage participation of New Zealanders in the New Zealand outdoors in the past year.

Under 30s (53%) and over 60s (43%) were more likely to have visited cultural or historic heritage sites two to three times a year or more. In addition, people who were university educated were more likely to have visited these sites a few times a year (59%) than those who were not (40%), suggesting that there may be scope to deliver a more developed storytelling component to cultural and historic heritage offerings (ie combine facts with meaningful stories presented in an engaging way).

In total, 78% of all survey respondents said that their expectations of New Zealand's cultural and historic heritage sites were 'generally met', with females (80%) and provincial South Islanders (82%) in particular being more likely to report this. However, almost one in five (16%) were 'unsure' (potentially these were non-visitors), while less than one in ten (7%) did not have their expectations met. The qualitative research revealed that people were often underwhelmed or uninspired by their experience, with those aged 45–59 years in particular being less likely to have their expectations met.

Over half (57%) of all respondents believed that the preservation of cultural or historic heritage was 'one of the most important issues in New Zealand today', especially people who were 60 plus (65%), Māori (66%) and grew up overseas (62%).

Messaging to protect cultural or historic heritage sites was also tested through the survey. Of the four heritage messages tested, the two that were most encouraging for respondents were 'If we all take small actions, we can preserve NZ's cultural and historic places for future generations' (67% support) and 'If we don't preserve these places, these special reminders of our history will be lost forever' (66% support). A similar proportion of respondents (64%) were also encouraged by a third message: 'Cultural and historic sites provide a unique aspect to our enjoyment of NZ's outdoors'. The following quote reflects this.

"Two minutes down the road there was an old pā site down a hill that people would just go and walk on but that was a massive pā that looked out over the whole ocean. So that was important and that is where they always do the Anzac Day celebrations." Female young person, Christchurch.

7.2 Cultural or historic heritage perceptions

Contrasting perceptions of cultural or historic heritage sites were obtained during the qualitative phases of research, as reflected in the following quotes. Better signage and storytelling at these sites could help to engage more New Zealanders.



"I absolutely love history. My family and I are Auckland and Northland based and there are a lot of heritage sites and history in Auckland. Certainly visitors who come here, I always tell them to call into Waitangi. That is the one thing they can call into easily." Male, general public, Auckland.

"We went to Stonefields in Onehunga ... and there was not much to look at. It was a long way to go for not seeing very much. If you went to Greece, it is kind of the same except there are a lot more pictures of what it used to look like." Male, general public, Auckland.

“The past history of how New Zealand was created and who arrived and those things and the artefacts they found and the history of the people behind that. I grew up with a lot of history and a lot of digging up old things like that.” Older female, Christchurch.

“I think if you come across a sign and it says historic place and you are not quite sure what it is. But a wee bit more elaborate sign ... in Banks Peninsula and here is the site where Te Rauparaha came down and ate half the local Māori population and beat the rest of them to death. The island where they made their last stand is a pretty cool place. But a sign saying ‘Historic Place’ wouldn’t make me stop. ‘Local Māori Massacre’ [would].” Older male, Christchurch.

7.3 A latent opportunity

There were some indications that cultural or historic heritage sites could have a wider appeal to more New Zealanders.

- Asian survey respondents were more likely to visit cultural or historic heritage sites (15%) and go sightseeing (42%) in the outdoors at least monthly, suggesting they are interested in discovering and learning more about New Zealand’s culture and heritage. This may also reflect a desire to learn what it is to ‘be a Kiwi’. This suggests that there is an opportunity to encourage Asian participation. Note: There may be cultural bias in the data, with new migrants and Asians tending to agree when asked survey questions.
- New migrants were more likely to agree that heritage was important (62%) compared with those born in New Zealand or who arrived before 2000 (56%). Therefore, there may be a latent opportunity to increase the appeal of sites to new migrants.

“What fascinates me most about New Zealand is if you go to the likes of Warkworth and they have this little museum outside the town and inside the museum they have every little comb from the first days of New Zealand – it’s fantastic. It has so many possibilities, it has so much potential. It’s four times the size of Ireland with the same population. There’s so much distance between towns, and once you get out of the cities it’s vast and I like that. Say you are at the kauri museum or the gold mines in Thames, I love the entrepreneurial spirit that they had. In some respects, they exploited the country, but having said that they arrived here with nothing and built a nation. You have preserved your history and hung on to it. And it’s easy to access. It’s not in a dusty room somewhere.” Male new migrant, Auckland.

“Sometimes when you go to the countryside you can see the Māori statues. But they don’t have any explaining to them. So if a tourist wants to know what it’s there for, they don’t know.” Male new migrant, Auckland.

The quantitative results suggested that there was a potential willingness among all New Zealanders surveyed to take action to restore and protect recreation places and preserve heritage sites (Figure 35). (Note: The question and answers were socially desirable, which would have resulted in a bias.) One-third (33%) of New Zealanders said they would actively participate to improve places and sites, while a slightly higher proportion (38%) were interested in finding out more about what they could personally do.

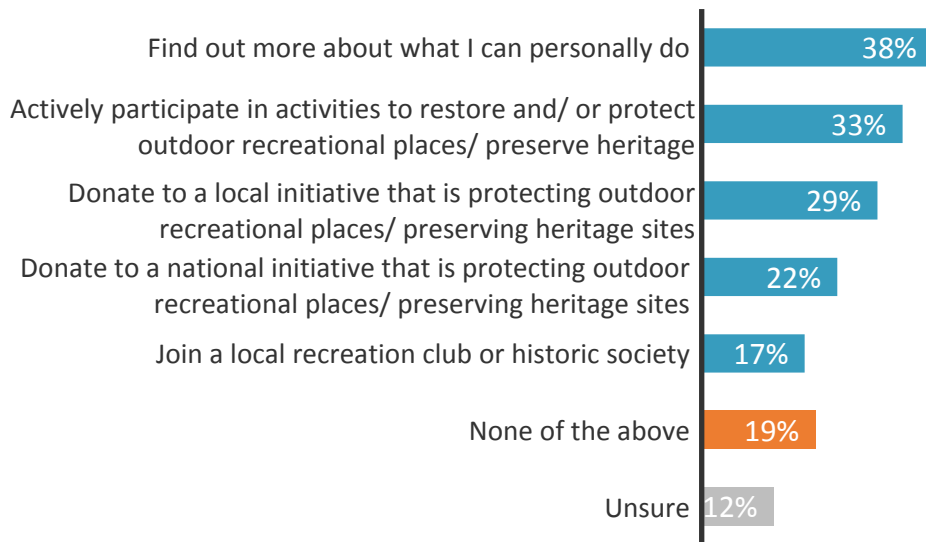


Figure 35. Percentage of responses to Q5c: 'What actions would you personally take to improve New Zealand's outdoor recreational places and heritage sites?' (n = 3,837; multiple response question).

8 Participation in walks

8.1 Short walks (< 3 hours) were popular

8.1.1 Overall short walks participation

- Short walks were the most popular outdoor activity, with 91% of the New Zealanders surveyed having participated in short walks in the outdoors somewhere in New Zealand over the last year.
- 79% of respondents said they did short walks at least monthly.
- The qualitative research found that short walks are easily accessible to many people. People have the skill and ability to comfortably do a short walk and it doesn't cost anything or require special equipment.

8.1.2 Short walks by customer segment

A breakdown of New Zealanders' participation in short walks by customer segment is provided in Table 3. The following key findings were made.

- Enthusiastic, Mindful and Social Actives were more likely to have participated in short walks both annually and at least monthly than all New Zealanders.

Table 3. Proportion of respondents who had participated in short walks annually and monthly by segment.

Proportion of each segment that participate in short walks annually:		Proportion of each segment that participate in shorts walks monthly:	
Mindful Actives (21% of NZ)	96%	Enthusiastic Actives (14% of NZ)	89%
Social Actives (21%)	95%	Mindful Actives (21%)	87%
Enthusiastic Actives (14%)	94%	Social Actives (21%)	82%
Stimulation Actives (11%)	89%	Stimulation Actives (11%)	79%
Home-Close Actives (13%)	87%	Home-Close Actives (13%)	74%
Other Things Actives (20%)	85%	Other Things Actives (20%)	67%
New Zealand	91%	New Zealand	79%

Green indicates that participation was higher than for other segments, while red indicates it was lower.

8.1.3 Short walks by region

A breakdown of New Zealanders' participation in short walks by region is provided in Table 4. The following key findings were made.

- The Tasman region had the highest proportion of residents participating in short walks annually, while the Nelson region had the highest proportion participating in short walks monthly.
- Residents of Tasman, Taranaki, Marlborough and Auckland were more likely to have participated in day walks annually than New Zealanders overall. (Note: Smaller sample sizes for some regions meant it could not be established if residents were more or less likely to have participated.)
- There were no regions where residents were less likely to have participated in short walks, and there was little regional difference in monthly participation in short walks compared with New Zealand overall.

Table 4. Proportion of respondents who had participated in short walks annually and monthly by region.

Proportion of each region that participate in short walks annually:		Proportion of each region that participate in short walks monthly:	
Tasman	97%	Nelson	86%
Taranaki	96%	Taranaki	84%
Marlborough	96%	West Coast	84%
Northland	93%	Gisborne	83%
Auckland	93%	Tasman	82%
Nelson	93%	Northland	81%
Otago	93%	Wellington	81%
Gisborne	92%	Auckland	80%
West Coast	92%	Bay of Plenty	79%
Bay of Plenty	91%	Marlborough	79%
Wellington	90%	Waikato	77%
Waikato	89%	Canterbury	77%
Canterbury	89%	Otago	76%
Hawke's Bay	88%	Southland	76%
Manawatu-Whanganui	88%	Hawke's Bay	74%
Southland	88%	Manawatu-Whanganui	74%
New Zealand	91%	New Zealand	79%

Green indicates that participation was higher than in other regions. Note: Participation may have been elsewhere in New Zealand outside the local region.

8.1.4 What people said

The qualitative research indicated that people go on short walks for everyday fitness, relaxation and fresh air in the outdoors. There seems to be lots of ‘walking the dog’ – locally on a daily basis or somewhere further on weekends. Parents and older people often walk around their neighbourhood because it has easy and accessible pathways. Some people also walk to and from work.

Many other outdoor activities include stints of short or long walks as part of them to places such as parks, beaches and the bush. Those activities range from sporting activities to mountain biking, swimming, surfing, camping, etc.

The following quotes illustrate the diverse experiences of walking in the outdoors.

“I like going for a walk because my brain is constantly whirling and you get time to slow down and crystalise and reset yourself. I sometimes go for a longer walk or maybe a run around a wider circuit around the community. My wife and I... get out and do a lot of walking around the neighbourhood to see what is happening around town and stuff.” Male, general public, Auckland.

“Yes, we walk every weekend and go to different places, whether it’s the beach or up a hill, and knowing that we have so many choices is important to me. I like living in a city but I wouldn’t like to live in a city where city life was my only option.” Female parent, Christchurch.

“About 6 months ago we went to the Bay of Islands and then on our drive back down we called into some places and did so many bush walks. I couldn’t tell you where they were but we just stopped at places when we saw signs. So probably about 6 months ago.” Female new migrant, Auckland.

“We want to make it easy on ourselves as well as for the kids so we want it to be close to easily accessible activities for the children so that we can also relax and enjoy ... cater to your children to make it easier on yourself. Female parent, Christchurch.

8.2 Day walks (> 3 hours but not overnight) were also popular

8.2.1 Overall day walk participation

- Day walks were the fifth most popular outdoor activity for New Zealanders, more than half (52%) of whom had participated in day walks and hikes somewhere in New Zealand.
- 23% of New Zealanders said they had participated in day walks at least once a month.

8.2.2 Day walks participation by segment

A breakdown of New Zealanders’ participation in day walks by customer segment is provided in Table 5. The following key findings were made.

- Enthusiastic, Stimulation, Mindful and Social Actives were more likely to have participated in day walks and hikes annually than New Zealanders overall (Table 5). However, only Enthusiastic and Stimulation Actives were more likely to have participated in day walks monthly.
- Home-Close and Other Things Actives had lower levels of participation in day walks and hikes compared with all New Zealanders both annually and monthly, and Social Actives were also less likely to have participated in day walks monthly.

Table 5. Proportion of respondents who had participated in day walks/hikes annually and monthly by segment.

Proportion of each segment that participate in day walks/hikes annually:		Proportion of each segment that participate in day walks/hikes monthly:	
Enthusiastic Actives (14% of NZ)	72%	Enthusiastic Actives (14% of NZ)	41%
Stimulation Actives (11%)	62%	Stimulation Actives (11%)	38%
Mindful Actives (21%)	61%	Mindful Actives (21%)	24%
Social Actives (21%)	57%	Social Actives (21%)	20%
Home-Close Actives (13%)	41%	Home-Close Actives (13%)	17%
Other Things Actives (20%)	31%	Other Things Actives (20%)	11%
New Zealand	52%	New Zealand	23%

Green indicates that participation was higher than for other segments, while red indicates it was lower.

8.2.3 Day walks participation by region

A breakdown of New Zealanders’ participation in day walks by region is provided in Table 6. The following key findings were made.

- The Nelson, West Coast, Northland, Auckland, Marlborough and Taranaki regions had the highest proportions of residents who had participated in day walks somewhere in New Zealand, both annually and monthly.
- Residents of Nelson and Auckland were more likely to have participated in day walks annually compared with all New Zealanders. (Note: Smaller sample sizes for some regions meant it could not be established if residents were more or less likely to have participated.)
- Residents of the Northland and Auckland regions were more likely to have participated in day walks monthly.

- Residents of the Waikato and Manawatu-Whanganui regions were less likely to have participated in day walks annually compared with all New Zealanders, while residents of Otago, Hawke’s Bay and Waikato were less likely to have participated in day walks monthly.

Table 6. Proportion of respondents who had participated in day walks/hikes annually and monthly by region. Note: Participation may have been somewhere in New Zealand other than the local region.

Proportion of each region that participate in day walks annually:		Proportion of each region that participate in day walks monthly:	
Nelson	62%	West Coast	33%
West Coast	61%	Northland	31%
Northland	59%	Taranaki	30%
Auckland	56%	Nelson	29%
Marlborough	56%	Auckland	27%
Taranaki	55%	Bay of Plenty	26%
Otago	53%	Marlborough	25%
Bay of Plenty	52%	Manawatu-Whanganui	22%
Canterbury	51%	Canterbury	21%
Southland	51%	Gisborne	20%
Hawke’s Bay	50%	Wellington	20%
Wellington	49%	Waikato	18%
Tasman	46%	Southland	17%
Manawatu-Whanganui	45%	Hawke’s Bay	15%
Waikato	43%	Tasman	15%
Gisborne	42%	Otago	15%
New Zealand	52%	New Zealand	23%

Green indicates that participation was higher than in other regions, while red indicates it was lower. Dark grey indicates that participation may have been ‘more likely’ but the result was impacted by a small sample size. Note: Participation may have been elsewhere in New Zealand outside the local region.

8.2.4 What people said

People are going further into the outdoors for day walks, visiting places where walking is often the key feature of the experience. These walks are purposeful – for example, walking to the summit, completing a longer circuit or exploring a feature (like a cultural or historic heritage site or dam/tunnel/waterway). Day walks often include others (eg friends, family or like-minded enthusiasts) where the experience is about spending quality time together and often require some planning and preparation.

The sensory experience of being in the outdoors is a key benefit to participating in day walks – for example, enjoying the sounds of birdlife, being in the presence of nature, enjoying the variety of plant and tree life, or enjoying scenic outlooks and views. The following quotes from the qualitative phases reflect those diverse experiences.

“Rangitoto Island ... doing it early in the morning and I thought it would have been perfect and not many people doing it and there were boat loads and people walking in a single file to get up to the view. It wasn’t at all what I had anticipated ... we had to do our own thing and go to a different part of the island on purpose to get away from that and have the experience that I wanted to have.” Female young person, Christchurch.

“If you are going for the day, it’s more food and walking around. Just for a trip really. It’s beautiful but you probably couldn’t go for longer than a weekend ...” Female young person, Christchurch.

“If you know it’s only going to be an hour’s walk or something then you will take the equipment you need for that, so maybe some food and enough water. Maybe a jacket. But if you know it’s going to maybe be a 5-hour trek and you go okay I need to take a lot more with me and be prepared that if something happens I have enough for overnight.” Male parent, Christchurch.

“The last one I did ... you had to kayak out there first. It was a work thing ... walk up the top, come back down and kayak back. We had to do it quite fast ... but I wouldn’t describe it as an easy walk. There are easier walks around.” Male, general public, Auckland.

8.3 Multi-day walks (overnight)

8.3.1 Multi-day walks participation

- 22% of respondents said they had participated in multi-day walks somewhere in New Zealand in the last year.
- 8% of New Zealanders said they had participated in multi-day walks monthly.

8.3.2 Multi-day walks participation by segment

A breakdown of New Zealanders’ participation in multi-day walks by customer segment is provided in Table 7. The following key findings were made.

- Stimulation and Enthusiastic Actives were more likely to have participated in multi-day walks both annually and monthly than all New Zealanders.
- Home-Close, Social and Other Things Actives had lower levels of annual participation in multi-day walks than the overall New Zealand population. These segments along with Mindful Actives were also less likely to have participated in multi-day walks monthly.

Table 7. Proportion of respondents who had participated in multi-day walks annually and monthly by segment.

Proportion of each segment that participate in multiday walks annually:		Proportion of each segment that participate in multiday walks monthly:	
Stimulation Actives (11% of NZ)	43%	Stimulation Actives (11% of NZ)	23%
Enthusiastic Actives (14%)	40%	Enthusiastic Actives (14%)	18%
Mindful Actives (21%)	21%	Home-Close Actives (13%)	4%
Social Actives (21%)	18%	Social Actives (21%)	3%
Home-Close Actives (13%)	14%	Mindful Actives (21%)	3%
Other Things Actives (20%)	10%	Other Things Actives (20%)	3%
New Zealand	22%	New Zealand	8%

Green indicates that participation was higher than for other segments, while red indicates it was lower.

8.3.3 Multi-day walks participation by region

A breakdown of New Zealanders’ participation in multi-day walks by region is provided in Table 8. The following key findings were made.

- The West Coast, Auckland, Taranaki and Marlborough regions had the highest proportion of residents who had participated in multi-day walks somewhere in New Zealand, both annually and monthly.

- Only Aucklanders were more likely to have participated in multi-day walks annually and monthly than New Zealanders overall. (Note: Smaller sample sizes for some regions meant it could not be established if residents were more or less likely to have participated.)
- Residents of the Manawatu-Whanganui and Hawke’s Bay regions were less likely to have participated in multi-day walks annually than other New Zealanders, while residents of Otago were less likely to have participated in multi-day walks monthly.

Table 8. Proportion of respondents who had participated in multi-day walks annually and monthly by region.

Proportion of people living in each region that participate in multi-day walks annually:		Proportion of people living in each region that participate in multi-day walks monthly:	
West Coast	28%	Marlborough	13%
Auckland	27%	Taranaki	12%
Taranaki	27%	Auckland	11%
Marlborough	25%	West Coast	9%
Nelson	24%	Gisborne	8%
Northland	22%	Waikato	7%
Gisborne	22%	Northland	6%
Canterbury	22%	Wellington	6%
Otago	22%	Bay of Plenty	5%
Southland	22%	Hawke's Bay	5%
Waikato	18%	Manawatu-Whanganui	5%
Wellington	18%	Nelson	5%
Bay of Plenty	17%	Canterbury	5%
Tasman	17%	Southland	5%
Manawatu-Whanganui	16%	Tasman	3%
Hawke's Bay	15%	Otago	3%
New Zealand	22%	New Zealand	8%

Green indicates that participation was higher than in other regions, while red indicates it was lower. Dark grey indicates that participation may have been ‘more likely’ but the result was impacted by a small sample size. Note: Participation may have been elsewhere in New Zealand outside the local region.

8.3.4 What people said

The qualitative phases of research showed that multi-day walks or tramps require planning and preparation. The length of this activity means it needs to be thought through and the costs, timing, equipment and weather need to be checked. Those who have grown up doing multi-day walks or tramps seem to continue that experience into their adult life.

Multi-day walks are about exploration, discovery, learning, adventure and challenge. There’s a sense of achievement and exhilaration for people who do multi-day walks regularly, as well as an appreciation and respect for the dramatic landscapes of the ‘great outdoors’. Seeing native birds and wildlife in nature (that others don’t get to see) is a highlight.

“Yes, I think a lot of family stuff. My parents were really active in making us go camping and tramping and water skiing and boating and everything outdoors. They loved it, so I

inherited that and have taken it on my own and done it as well.” Female young person, Christchurch.

“I think going back to the Great Walks they are very well-managed in terms of you only ever have a limited amount of people. So the footprint I think is really well done.”

Female, general public including hunters/trampers, Queenstown.

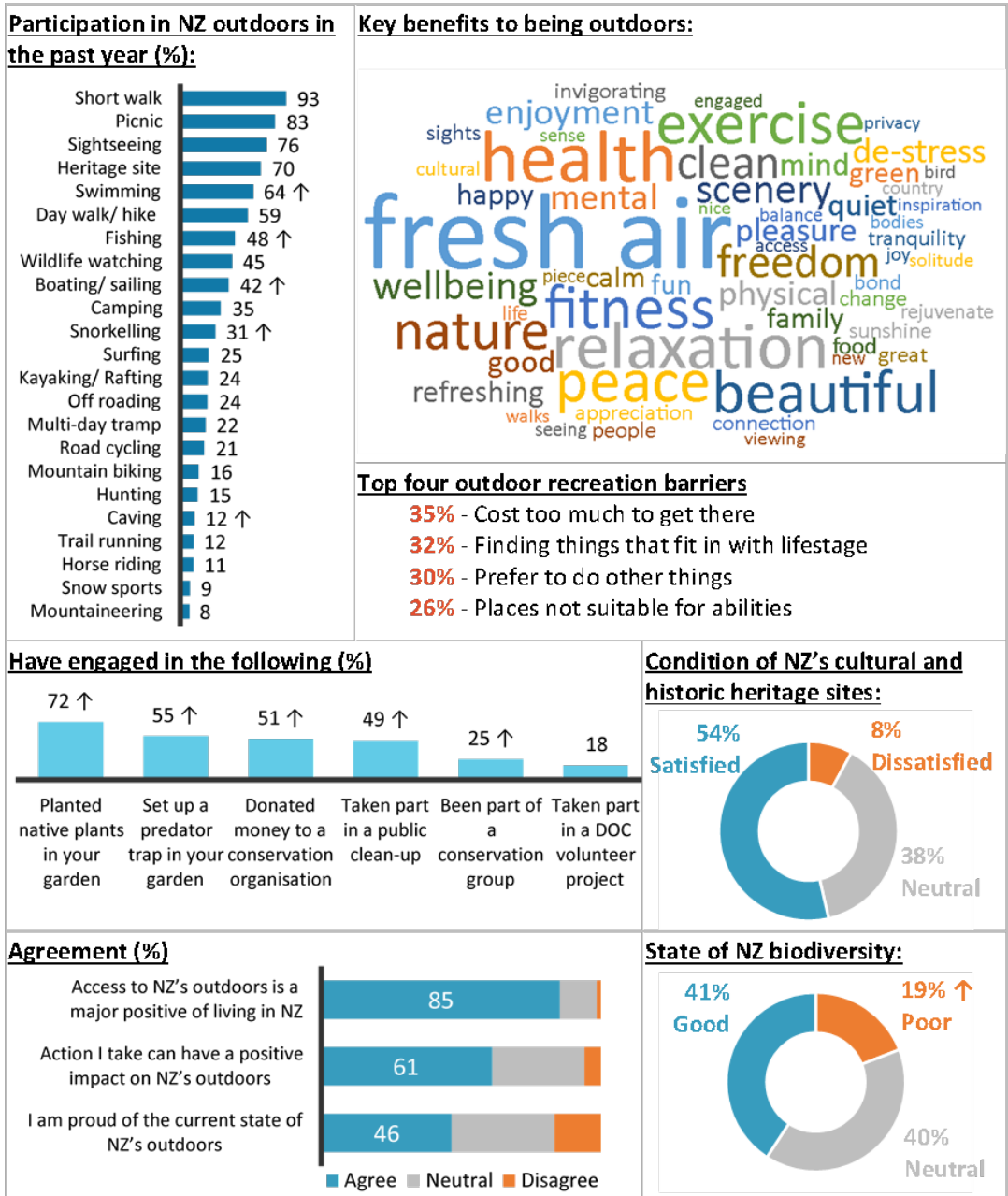
“Equipment you have, like say if you want to go tramping overnight and you have warm enough gear but the rest of your group doesn’t, and you don’t want to take them because they will freeze at night. And that can be costly if you don’t have it, and if you have to rent it that costs more money. I have an adventure group and a group of friends I hang out with ...” Male young person, Christchurch.

Appendix 1

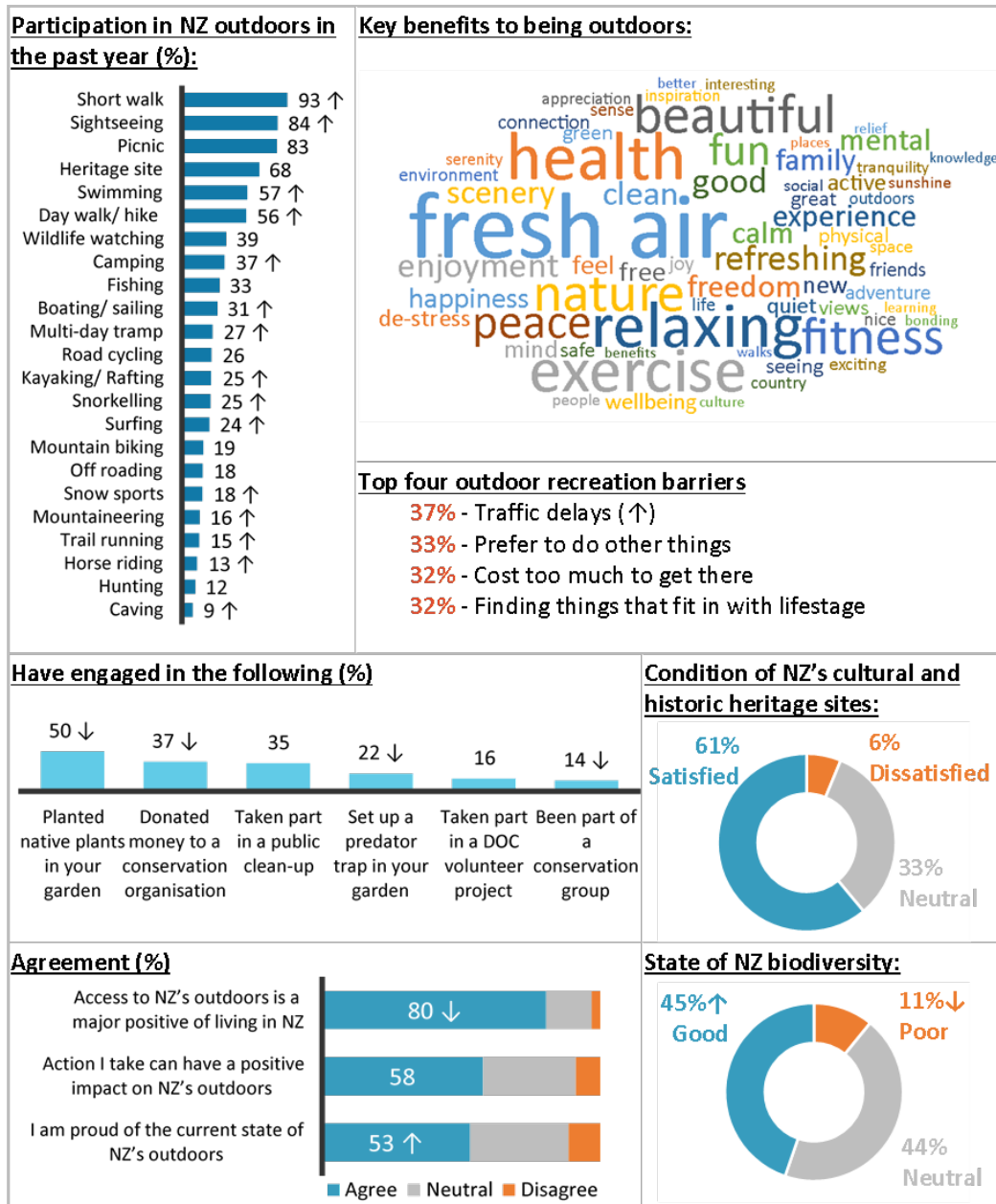
Regional snapshots

The following charts summarise the key points by region. It is suggested that the reader focuses on the upward or downward arrows, which indicate features that are more or less likely compared with other regions.

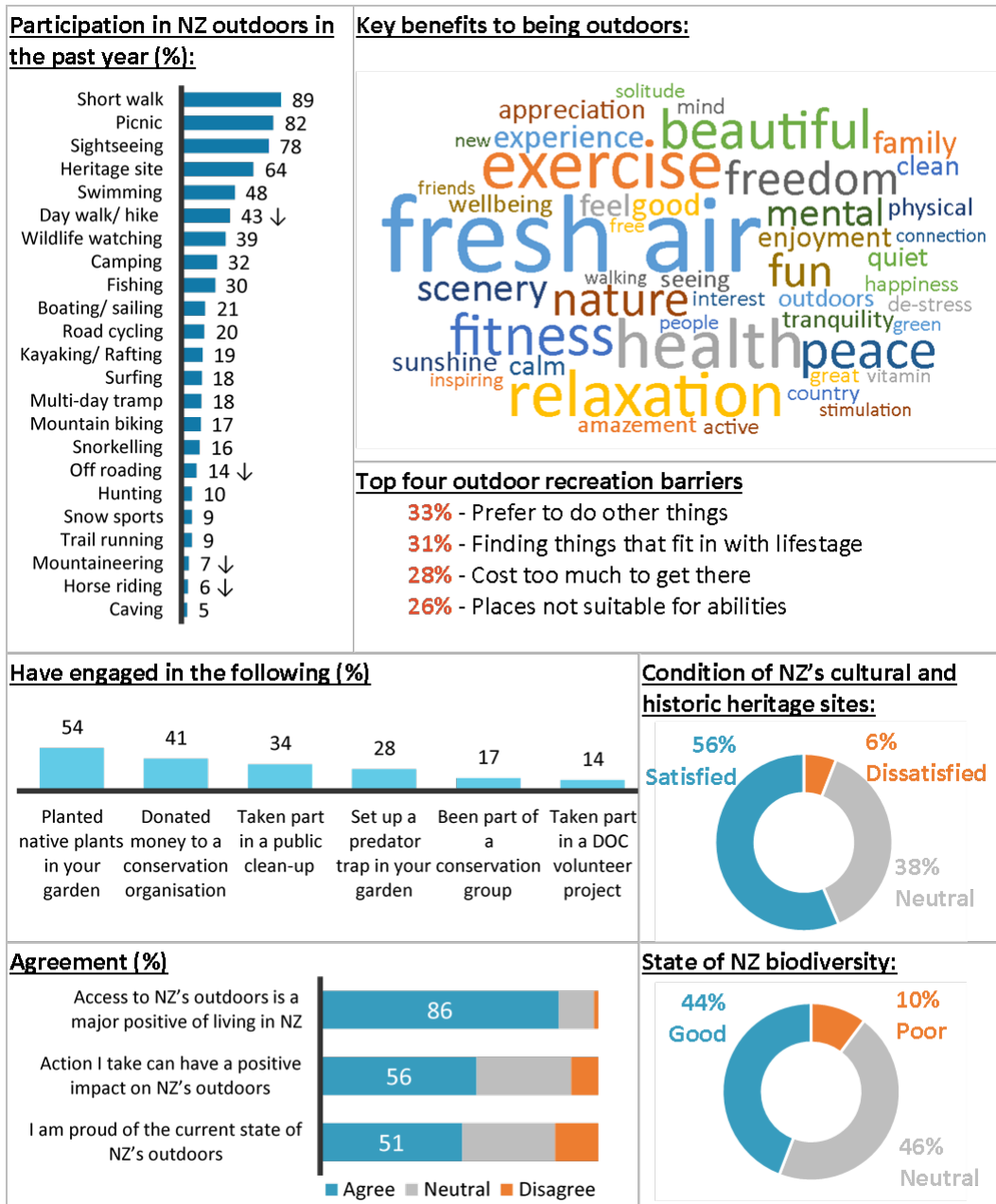
A1.1 Northland / Te Tai Tokerau



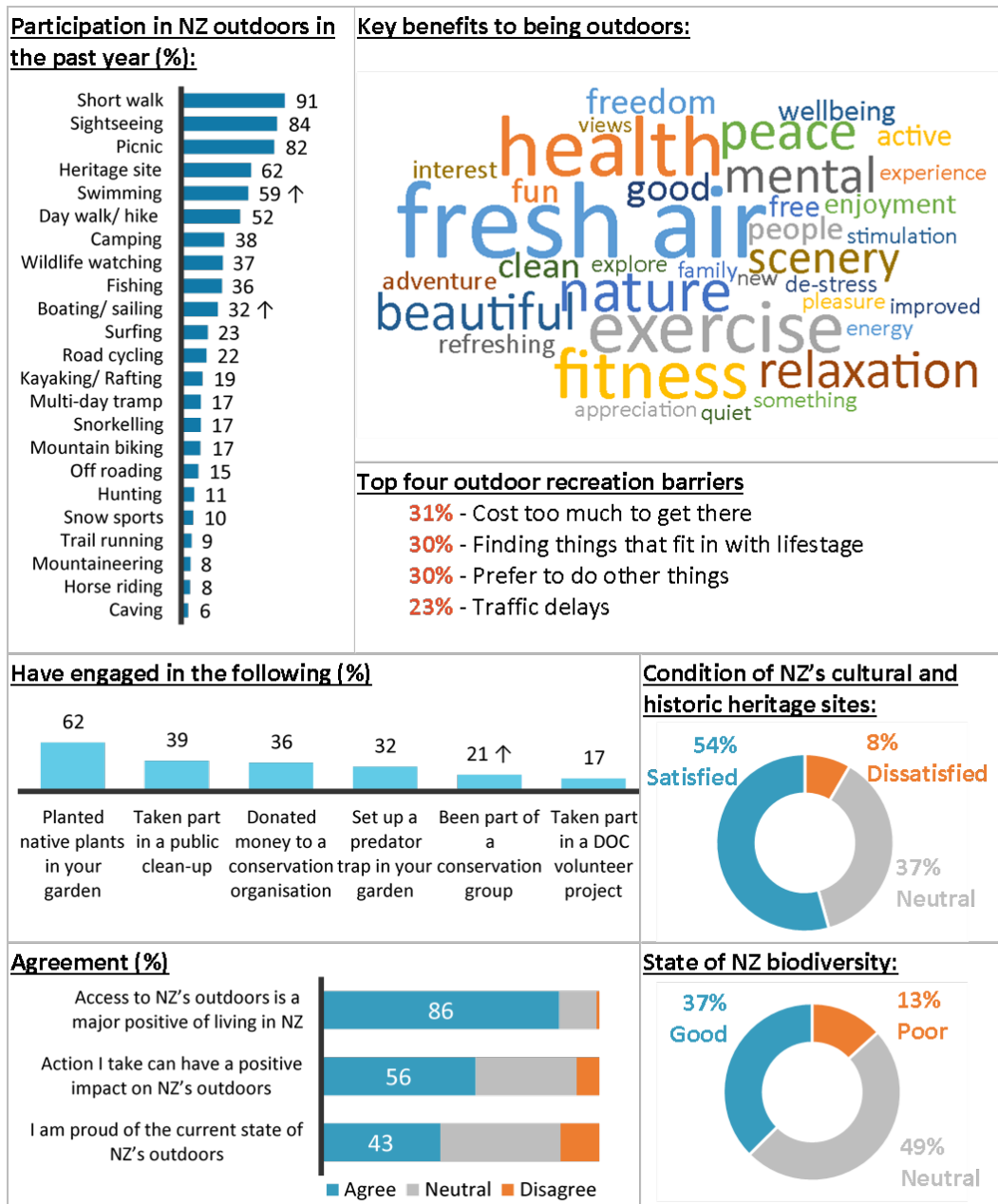
A1.2 Auckland / Tāmaki Makaurau



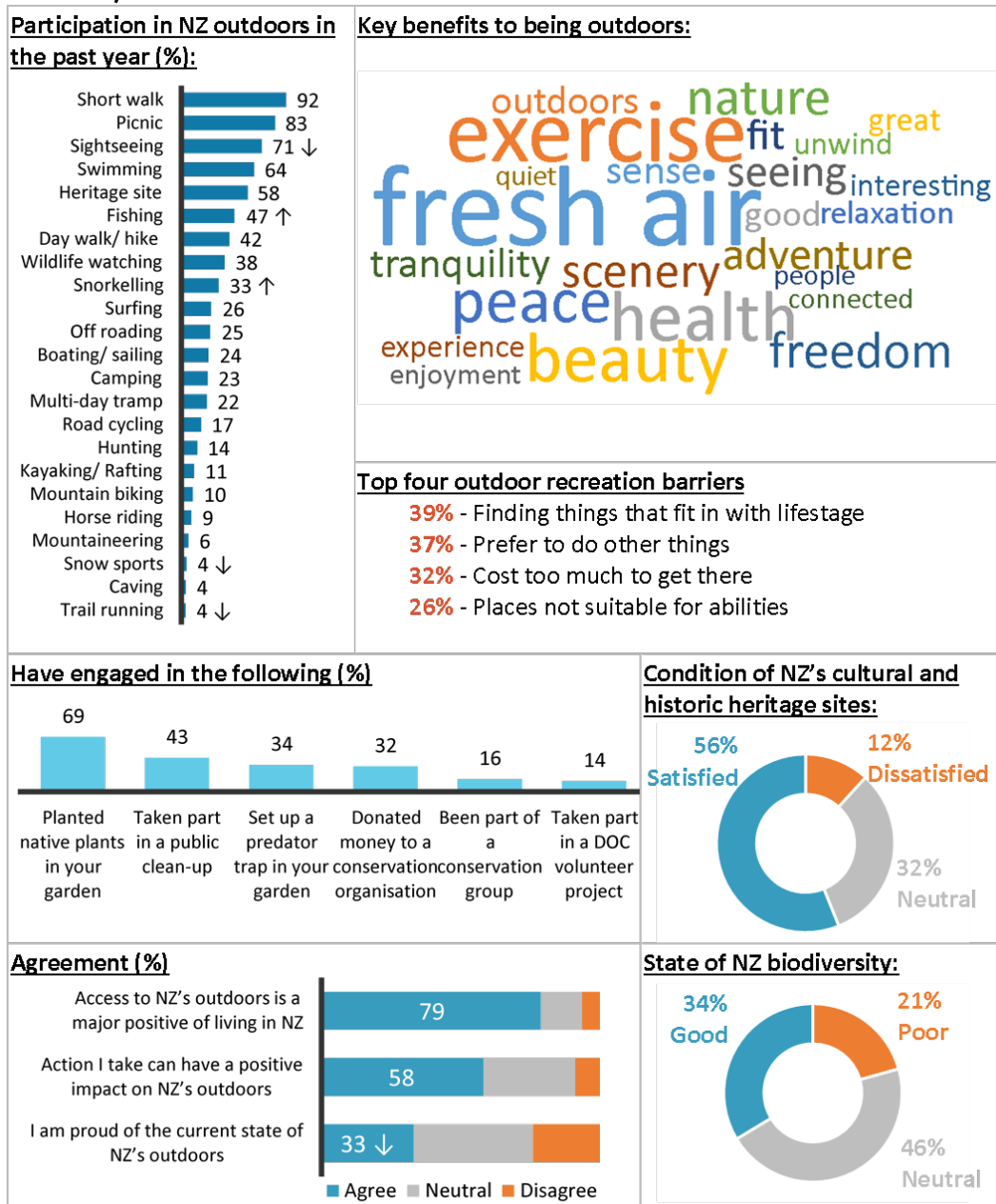
A1.3 Waikato



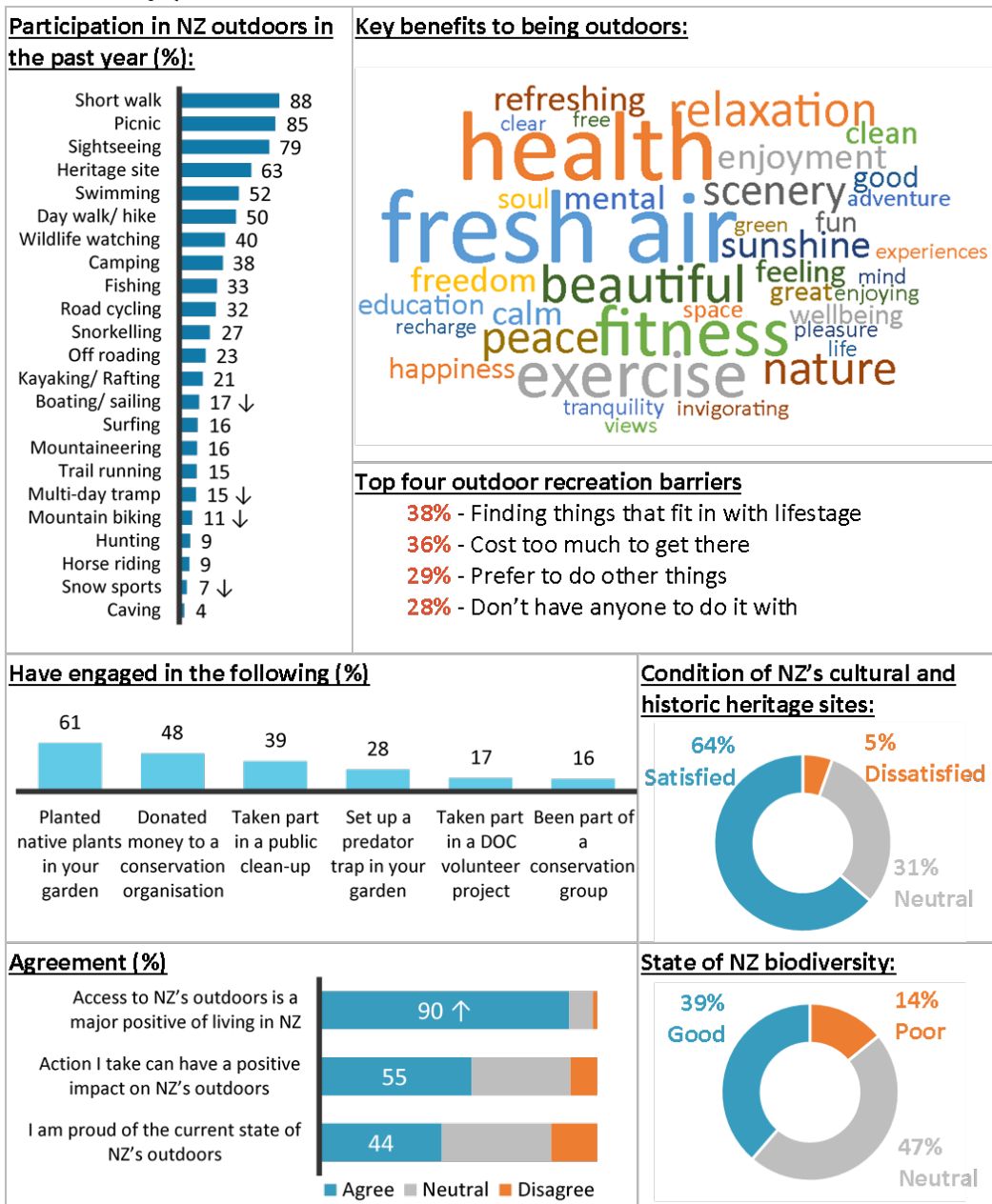
A1.4 Bay of Plenty / Te Moana a Toi



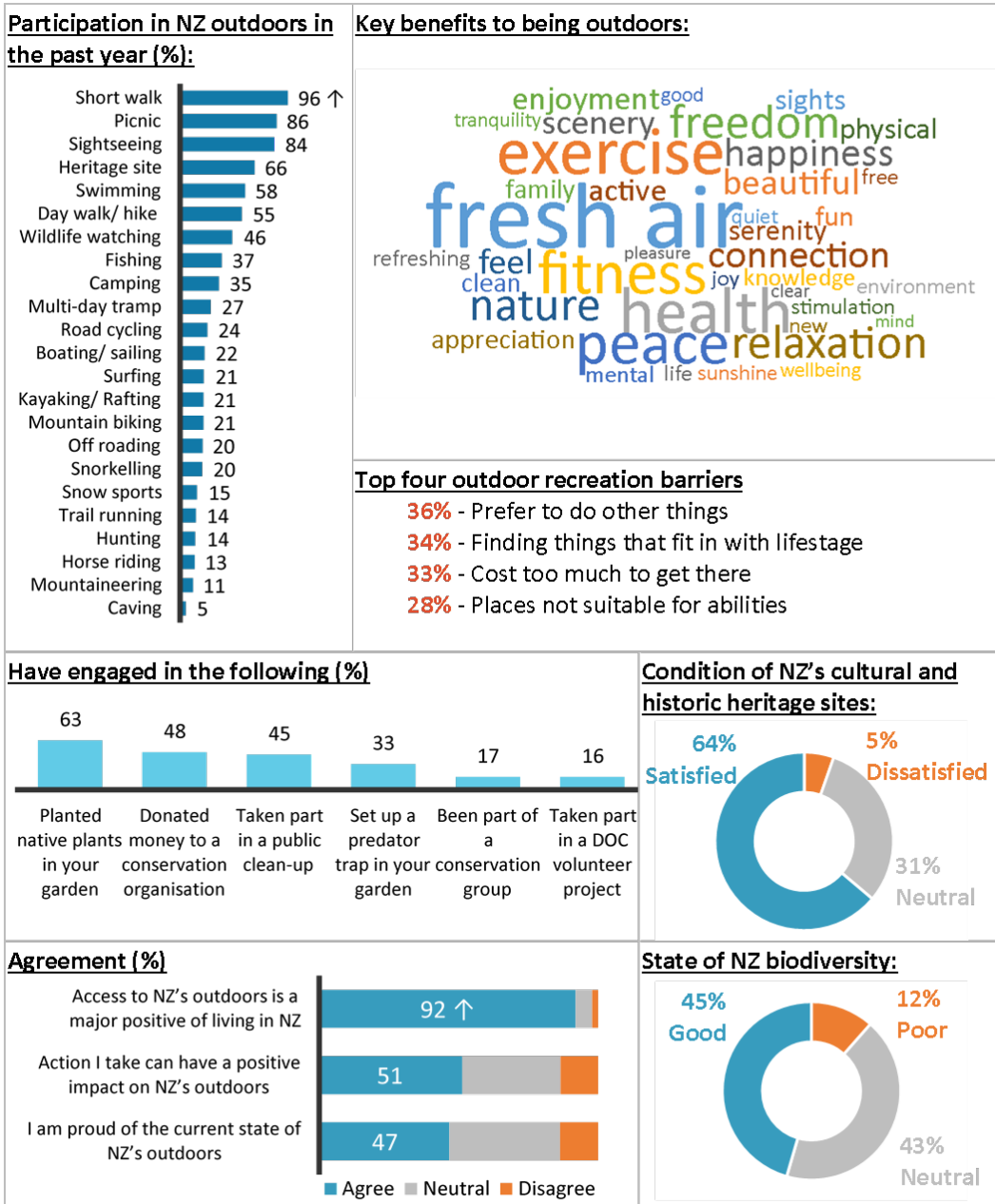
A1.5 Gisborne / Te Tai Rāwhiti



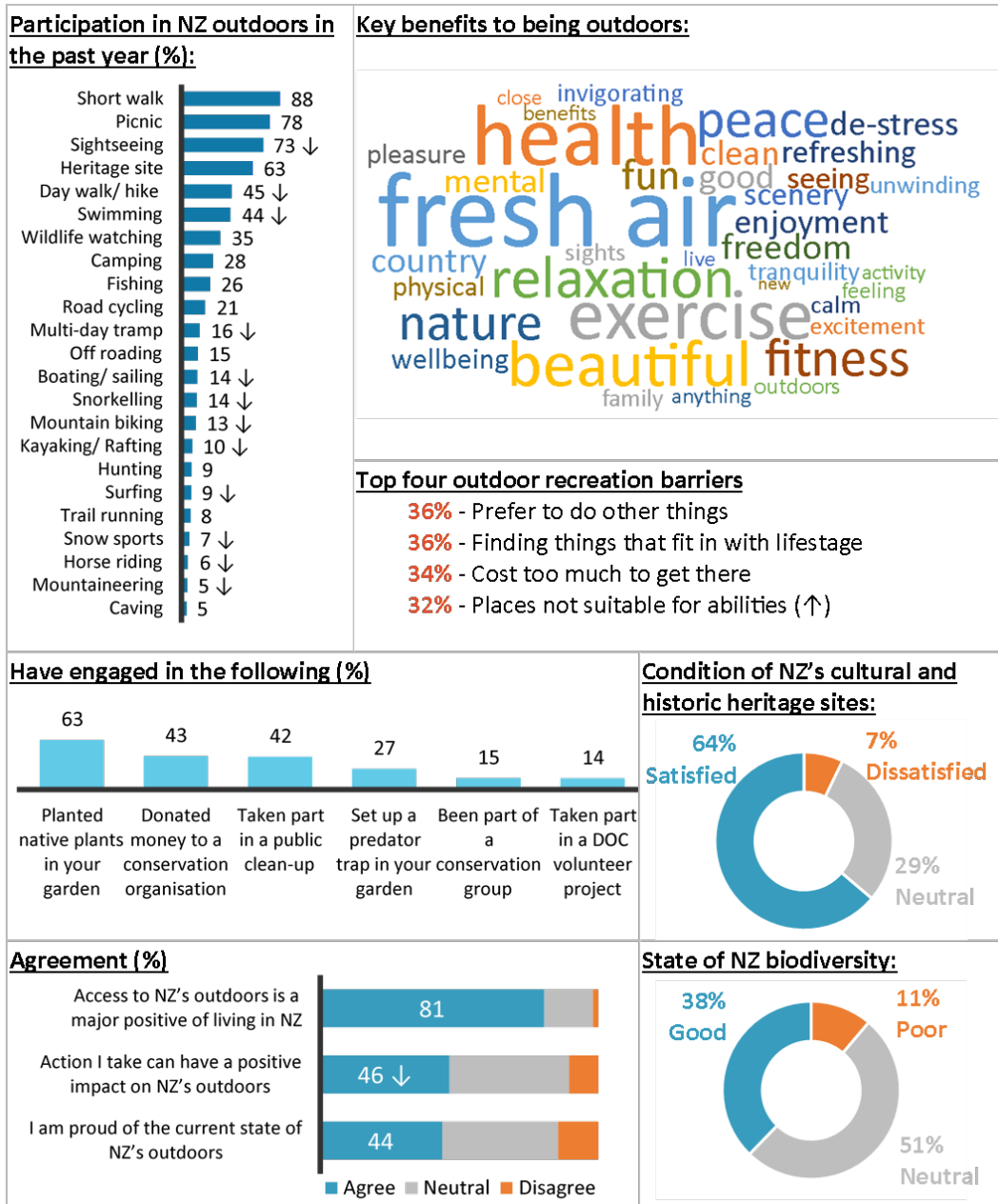
A1.6 Hawke's Bay / Te Matau-a-Māui



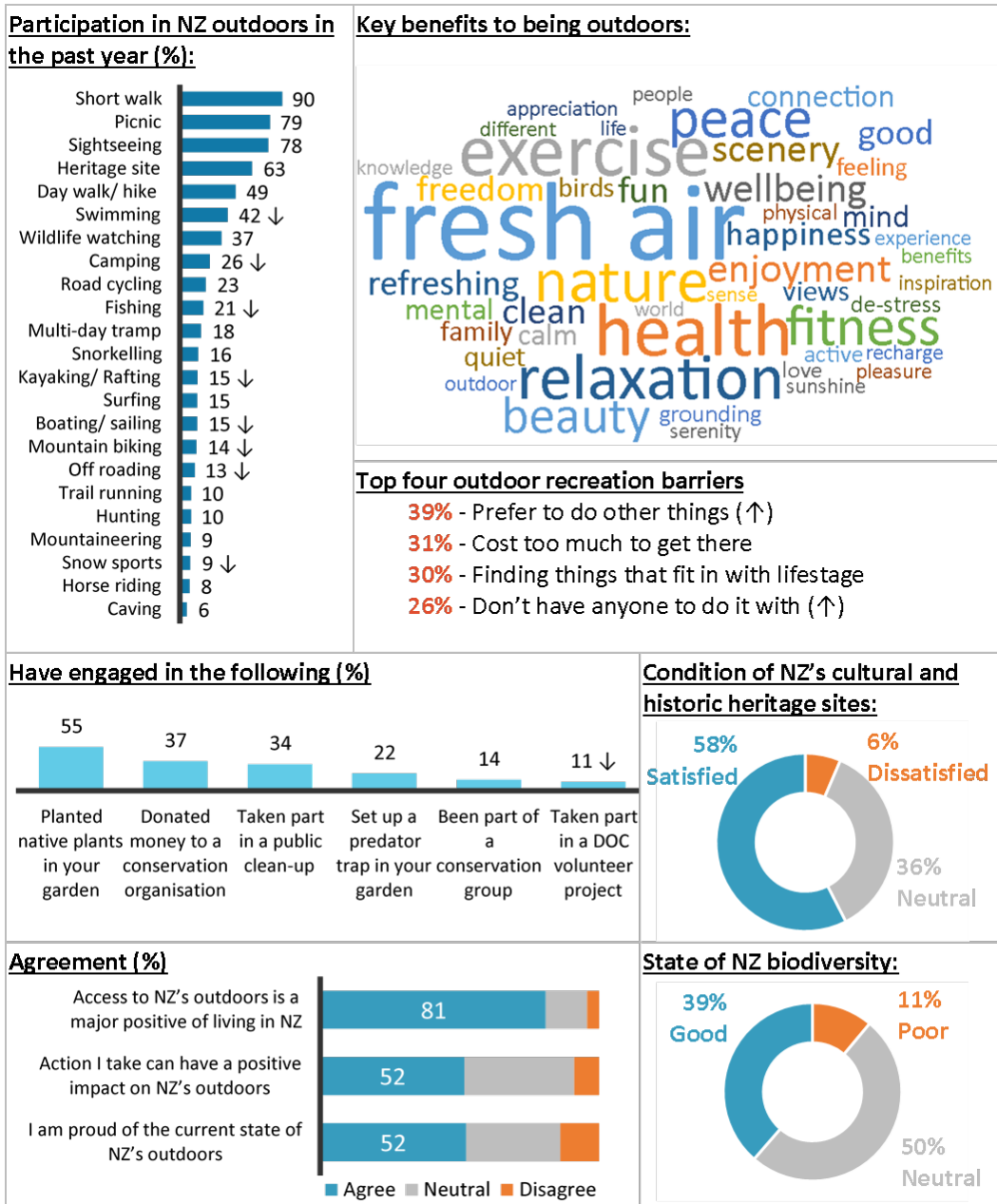
A1.7 Taranaki



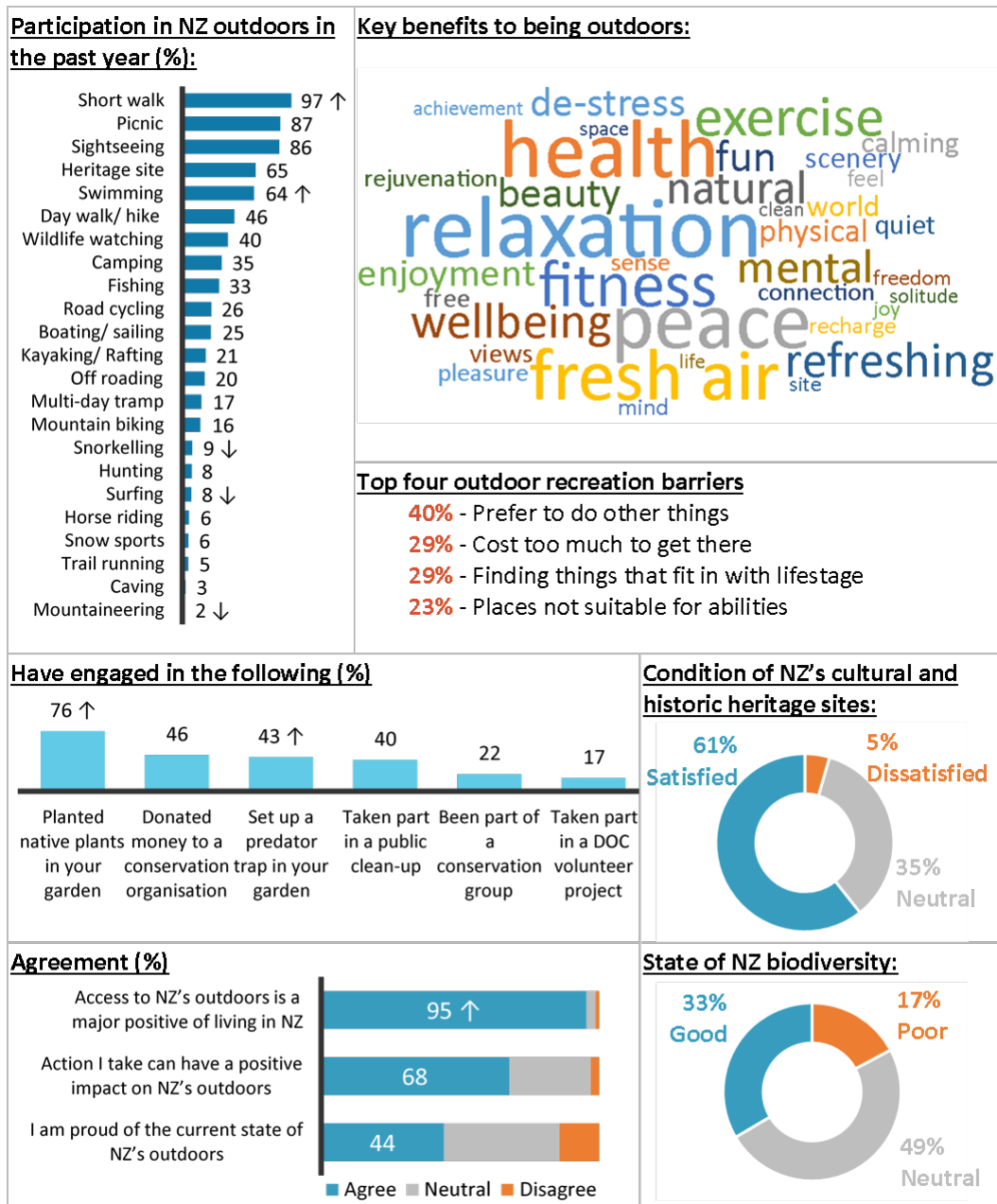
A1.8 Manawatū-Whanganui



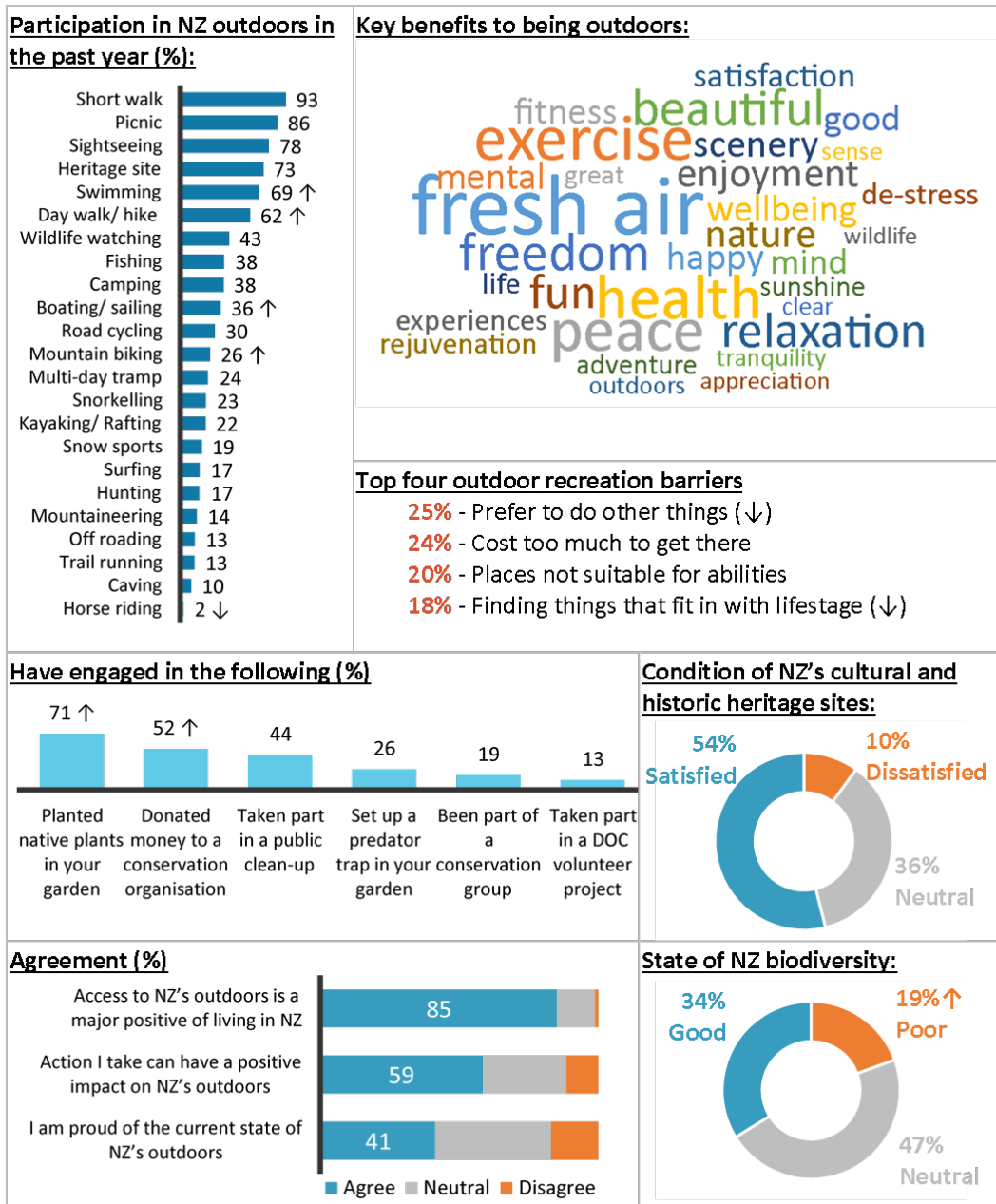
A1.9 Wellington / Te Whanganui a Tara



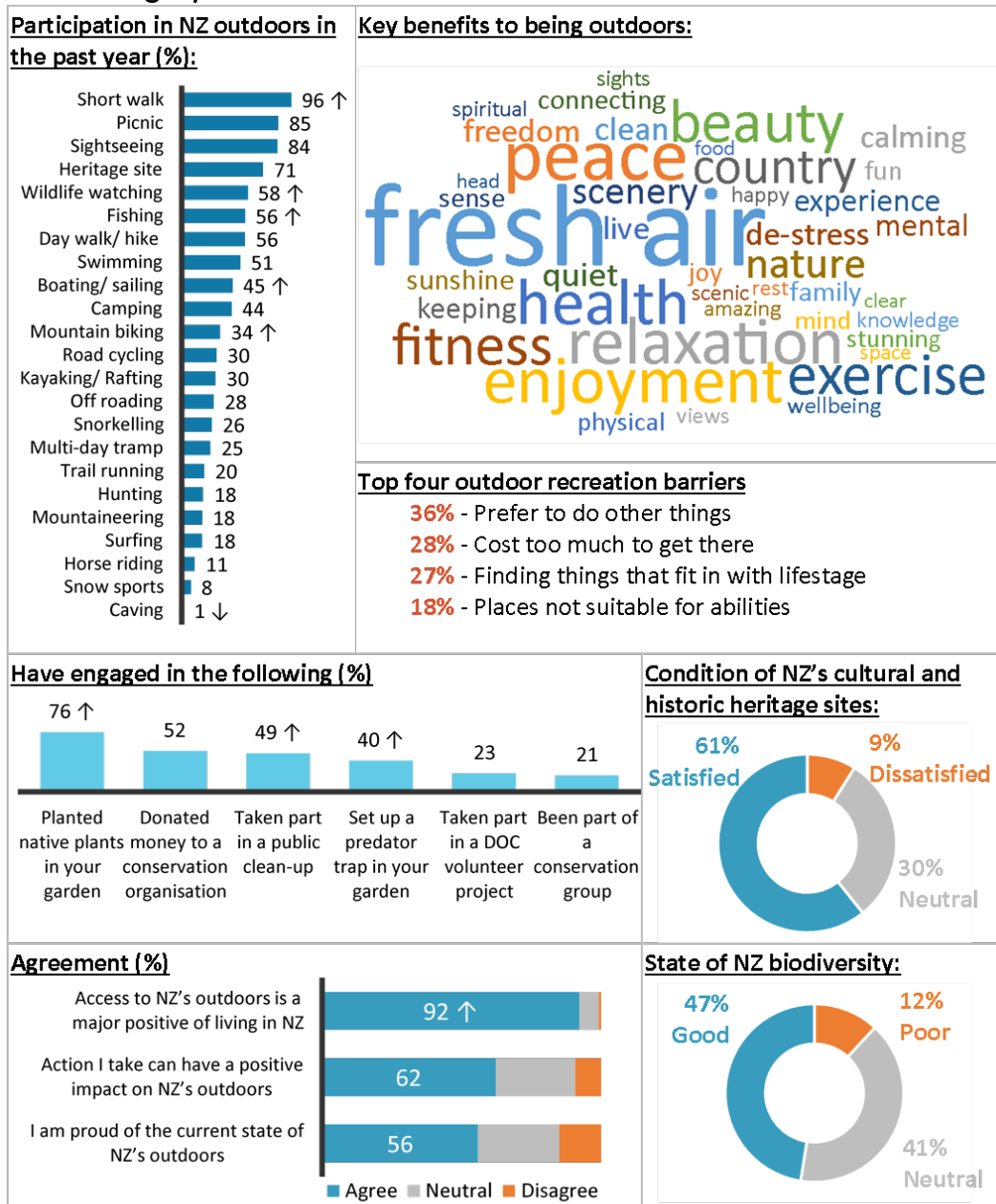
A1.10 Tasman / Te Tai o Aorere



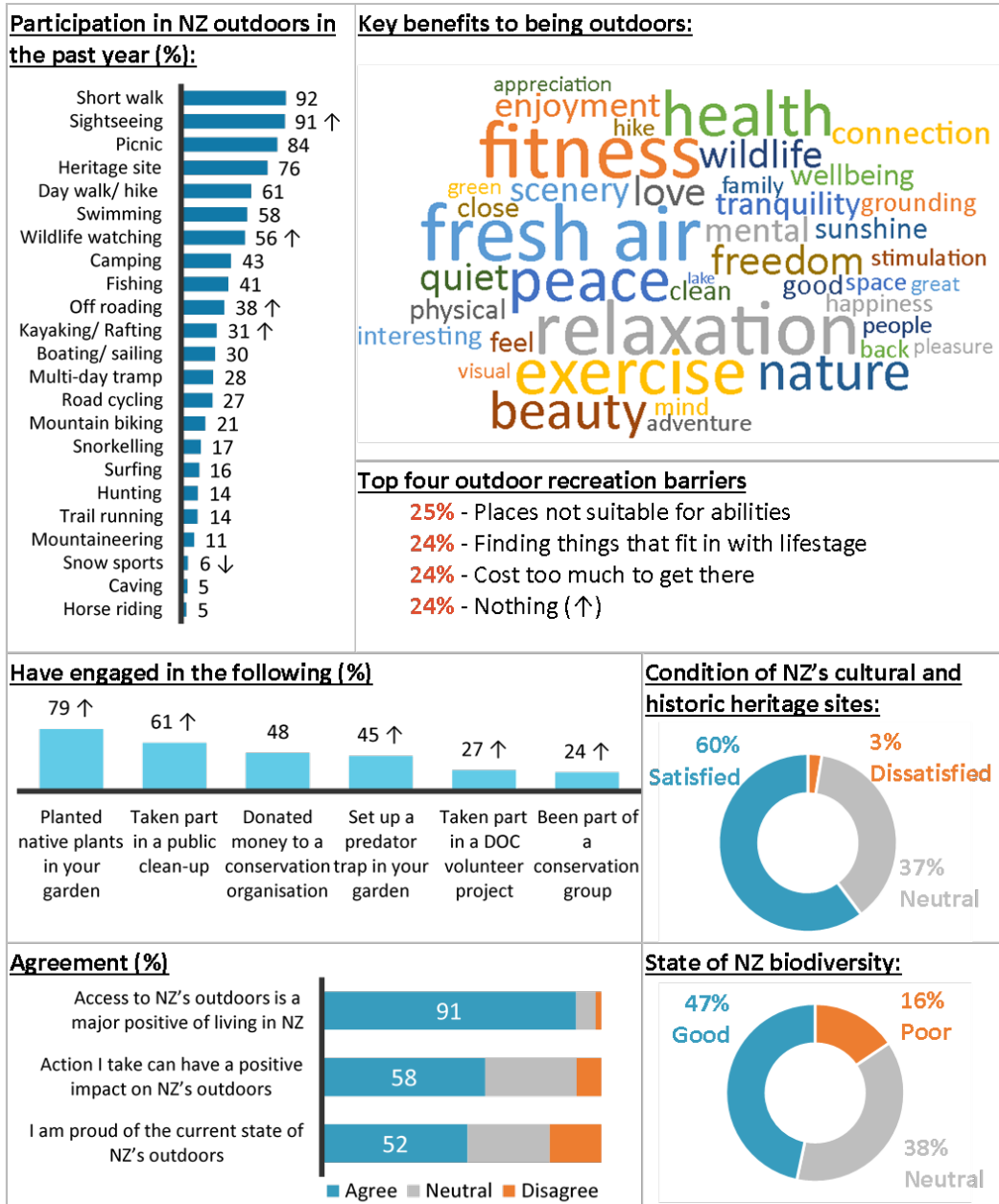
A1.11 Nelson / Whakatū



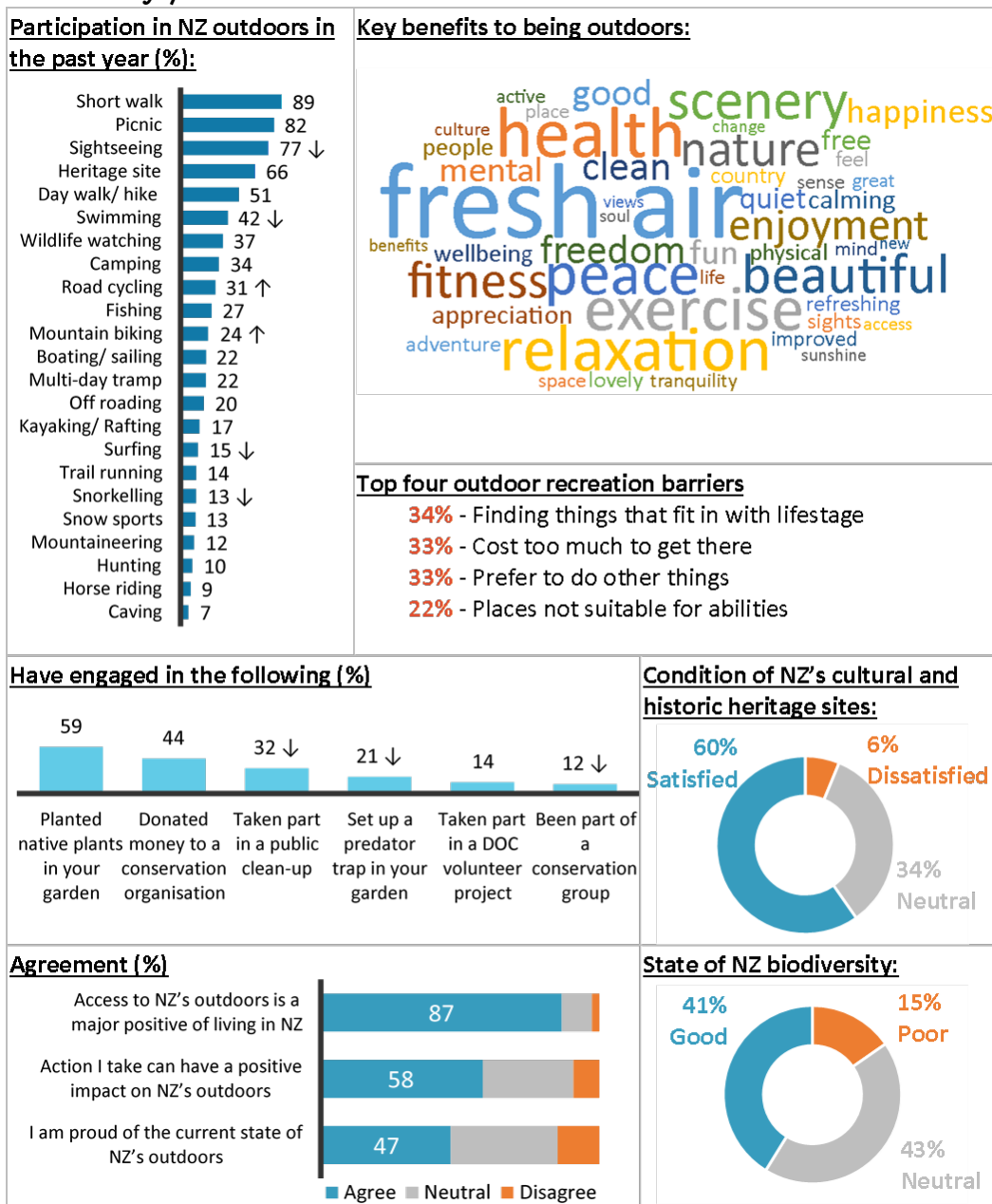
A1.12 Marlborough / Te Tau Ihu o Te Waka a Māui



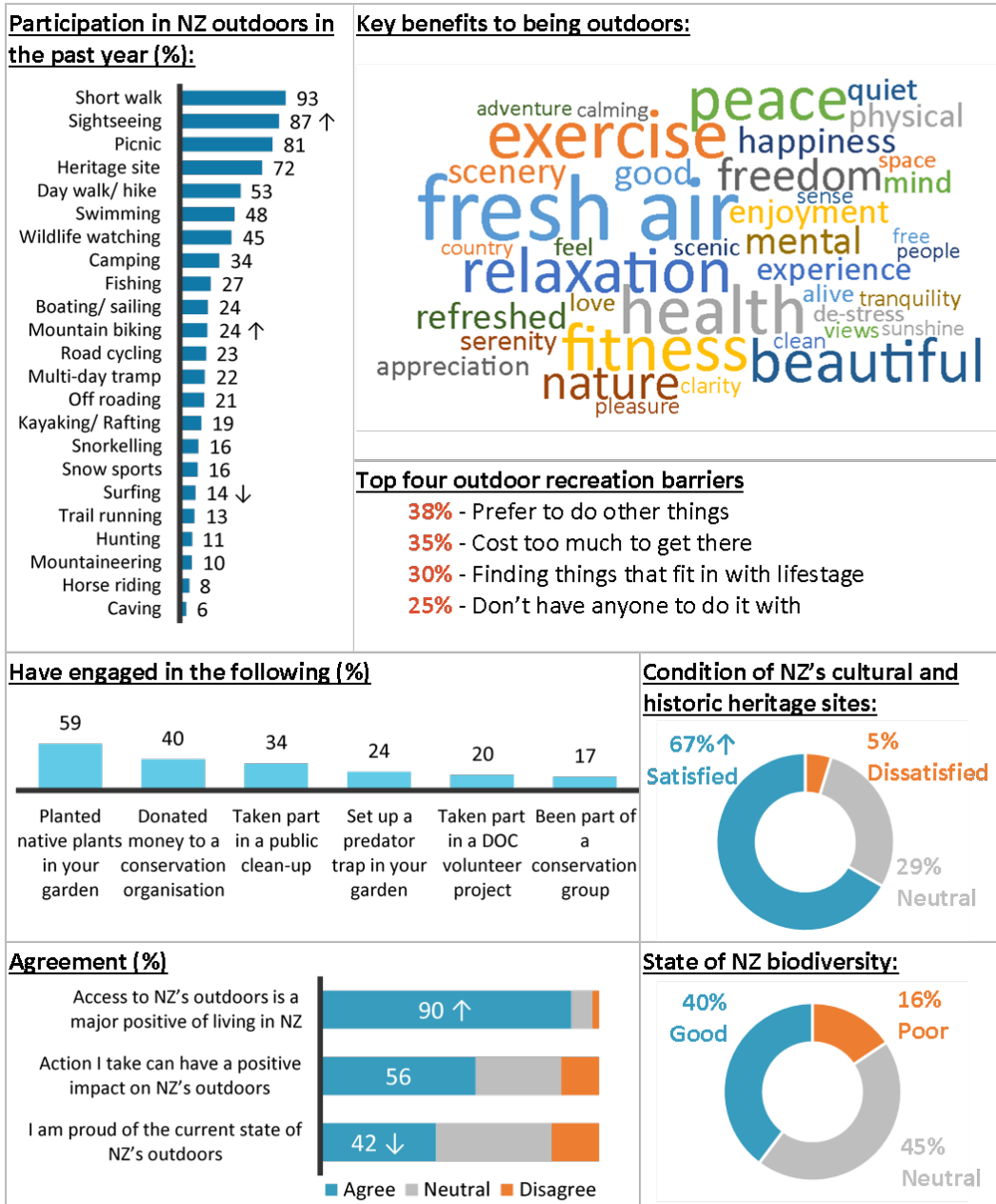
A1.13 West Coast / Te Tai Poutini



A1.14 Canterbury / Waitaha



A1.15 Otago / Ōtākou



A1.16 Southland / Murihiku

