



# ADVENTURE VOICE

## OUTDOOR RESEARCH COMMUNITY

### OUTDOOR RECREATION PARTICIPATION REPORT

DECEMBER 2024





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**THANKS**  
**Land**  
**Safety forum**  
*Te Ope Tautiaki Whenua*

**IMAGE CREDIT**  
Hunters Club  
Sarah Blair  
Malcolm McRae  
Jo Stilwell

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# INTRODUCTION

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This report presents findings from the Adventure Voice research community registration survey conducted between March - August 2024.

This survey is completed as part of the registration process. As such, each person has completed the survey at different times throughout the 6-month period.

## **The objectives of the registration survey are to:**

1. Complete the full registration process to become an Adventure Voice member.
2. Determine the activities that members participate in.
3. Develop an understanding of the experience level of members for each activity they participate in.
4. Identify the frequency of participation across activities, specifically how this changes between urban and backcountry environments for mountain biking, trail running and short/day walks.

As new members can join the Adventure Voice community at any time, the registration survey is ongoing.

Adventure Voice recruitment used a range of different channels and tactics, including social media, media releases and stories, targeted event sponsorship of the NZ Banff Mountain Film Festival, NZ Mountain Film and Book Festival, and NZ Hunting and Wildlife Expo, emails to MSC's contact database, and promotion and sharing from MSC partners via their communication methods.

Through this early promotion and recruitment, MSC expected that the initial wave of registrants would be those already connected with MSC and more frequent outdoor recreation participants of a higher-than-average experience level. This has proven to be the case.

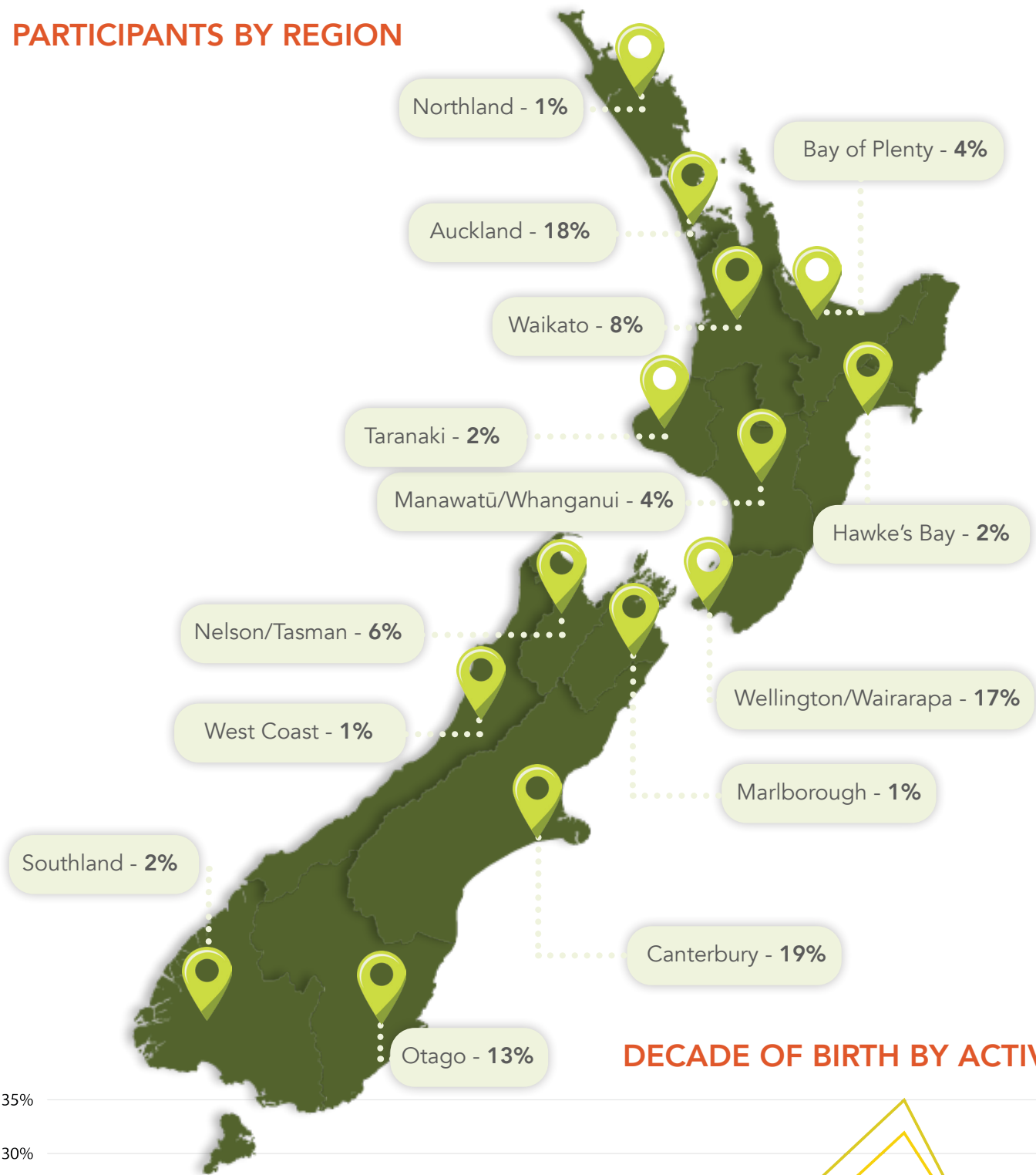
At the time of producing this report (December 2024), the Adventure Voice community had grown to over 3,500 members. Therefore, this report provides data and insights of a snapshot in time and is not necessarily reflective of the growing and evolving community.

After approximately six months, up to August 2024, a total of 2,004 people had completed registration. This report reveals what we have learned about these 2004 members, and compares this with insights from the Active NZ survey, run by Sport NZ.

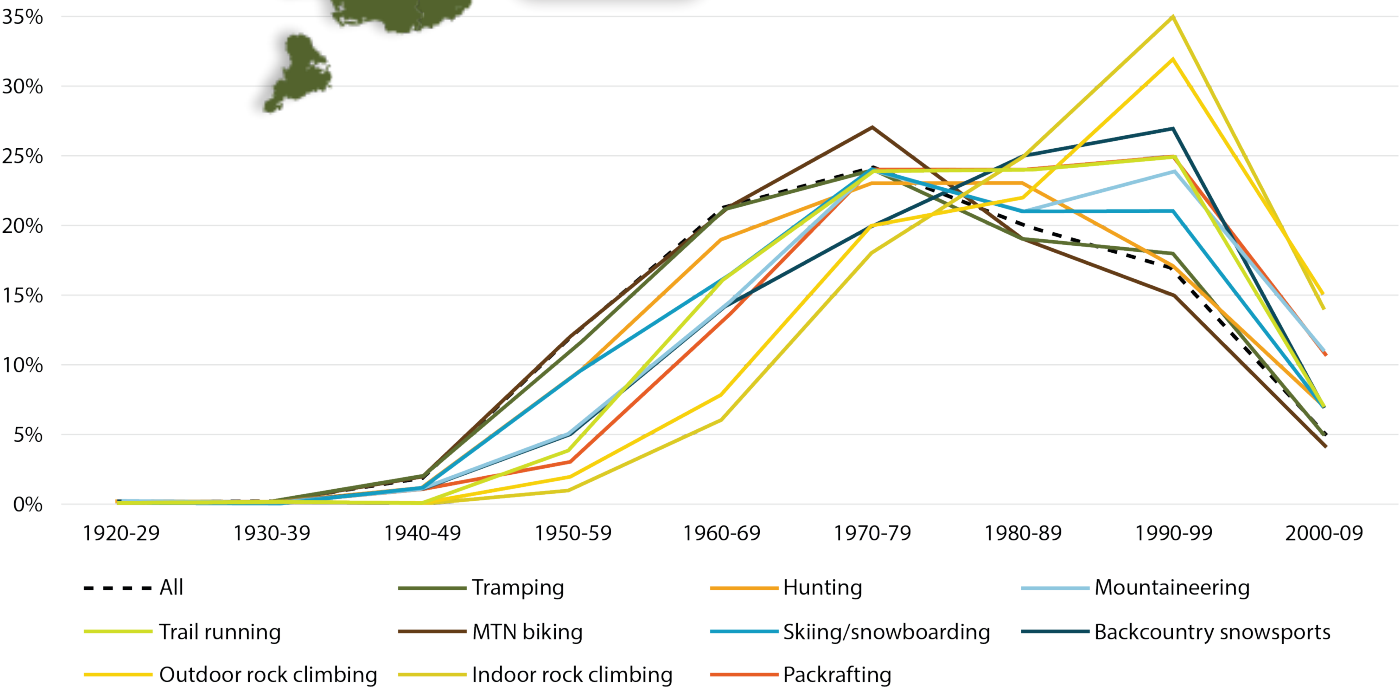




# PARTICIPANTS BY REGION



# DECADE OF BIRTH BY ACTIVITY



# SUMMARY

Adventure Voice membership climbed very quickly between its launch in March 2024 to August 2024, when the milestone of 2,000 members was reached. This showed a clear interest from the more active component of the outdoor recreation community to want to contribute to further insight in the interests of safety.

The registration survey asked all new Adventure Voice members to select the activities they participate in. The list includes outdoor, land-based recreational activities, as well as some water-based activities that generally require land-based activity skills. On average, respondents participated in four of these activities in the past year.

Unsurprisingly, short walks or day walks in the outdoors had the highest participation, with 97% of members taking part in this activity in the past year. Overnight and multiday tramping was the next highest activity, with 84% of members participating. Conversely, packrafting, caving and canyoning had the lowest number of participants. (Note: we have not analysed caving or canyoning further in this report due to low numbers).

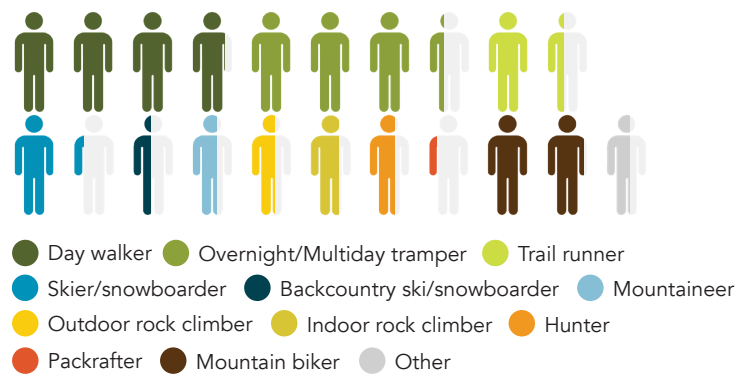
Most members live in the country's larger urban areas, with 53% residing in Auckland, Wellington or Christchurch.

At a broad level, we've identified that the membership can be split into two general subgroups. A larger group who are aged over 40, and a smaller more adventurous group who are under 40.

The larger group is 55% male and are slightly less active than the younger group. They participate in an average of 3.6 outdoor activities, including short walks and usually overnight tramps, with about half going mountain biking and some hunting.

The smaller group is 45% male and is a little more active but a lot more adventurous. They participate in an average of 4.7 outdoor activities. These include the same as the older group, but are likely to also participate in one or more of the following:

- Trail running
- Mountaineering
- Rock climbing (all types)
- Snow sports (all types)
- Pack rafting



PARTICIPANTS BY ACTIVITY





# ACTIVITIES

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Members of the Adventure Voice community regularly participate in an average of four or more outdoor activities per year. This section looks at their experience level and frequency of participation in each of the activities.

## SHORT WALKS OR DAY WALKS IN THE OUTDOORS

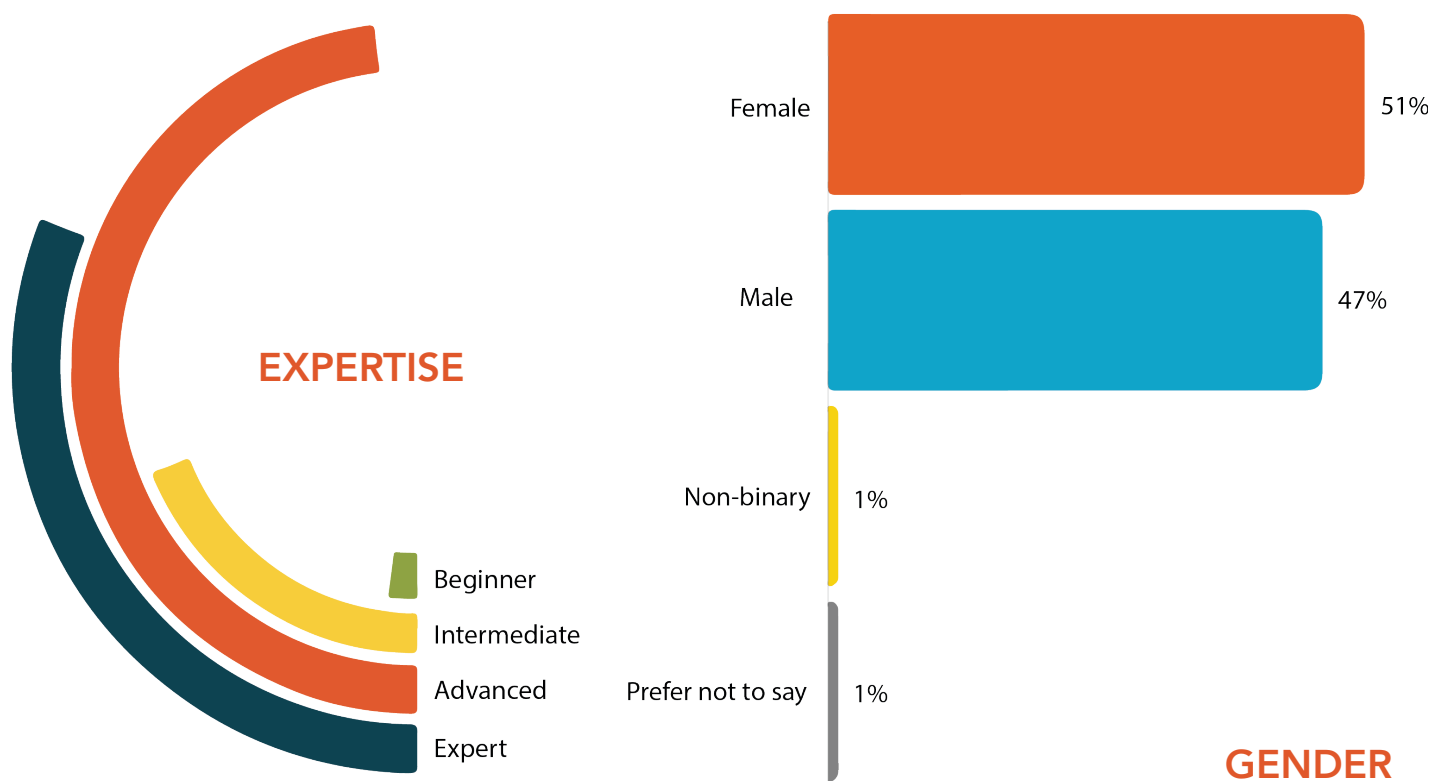
As the most popular outdoor activity, and one which is relatively accessible to most, it is unsurprising that this is also the most frequently participated in. Of the 97% respondents (1940), 66% of them said they had been for 13 or more short or day walks in the past 12 months in urban areas, and the majority went for seven or more walks in backcountry areas in the same period.

With the backcountry requiring more effort to get to, the greater frequency of participation in urban and urban-fringe areas is logical, but this finding helps us to see that those who go for walks in urban areas are also going for regular walks further afield, where additional planning, preparation, clothing and equipment is necessary.

Of all activities captured through Adventure Voice, 'short walks' has the fewest people who consider themselves to be beginners.

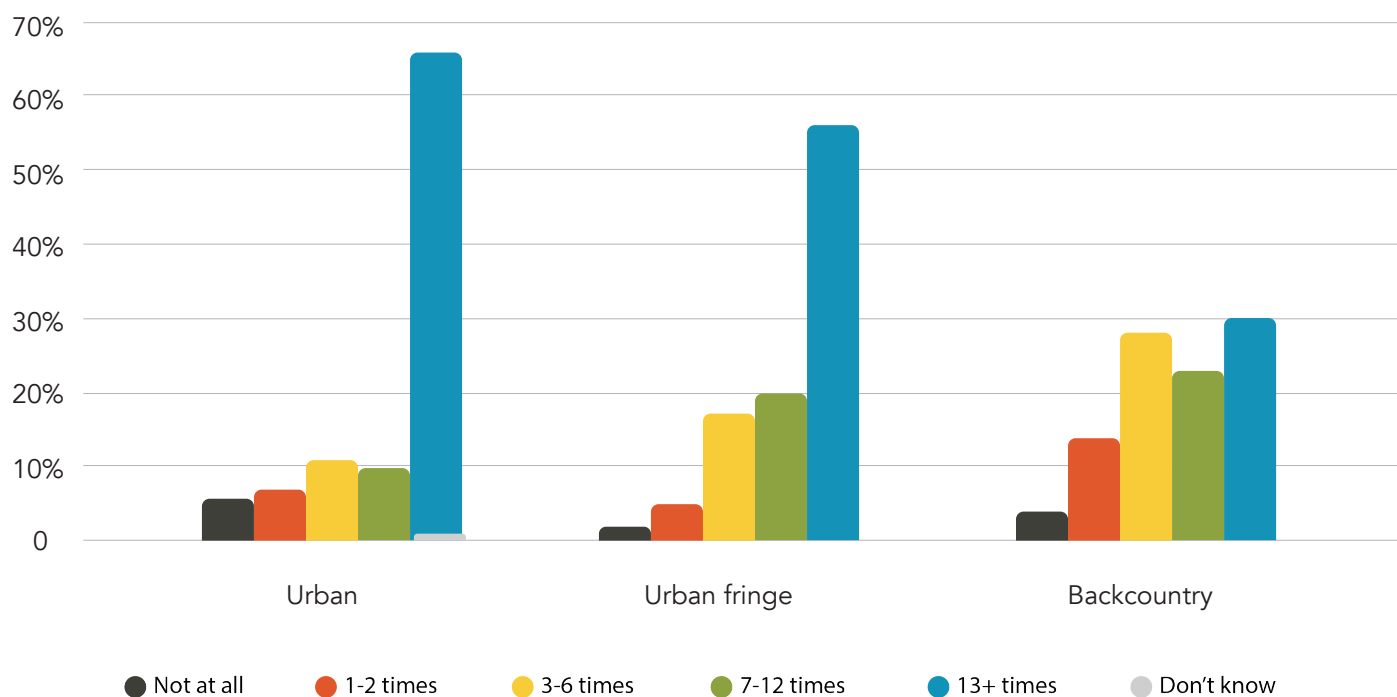
On average, people who go on short walks participate in three other land-based activities captured by Adventure Voice. For most, these other activities are overnight or multi-day tramping, mountain biking and trail running.





## THE 1940 SURVEYED SHORT WALK OR DAY WALKERS PARTICIPATED IN AN AVERAGE OF 4 ACTIVITIES

### SHORT/DAY WALK FREQUENCY BY ENVIRONMENT





## OVERNIGHT OR MULTI-DAY TRAMPING

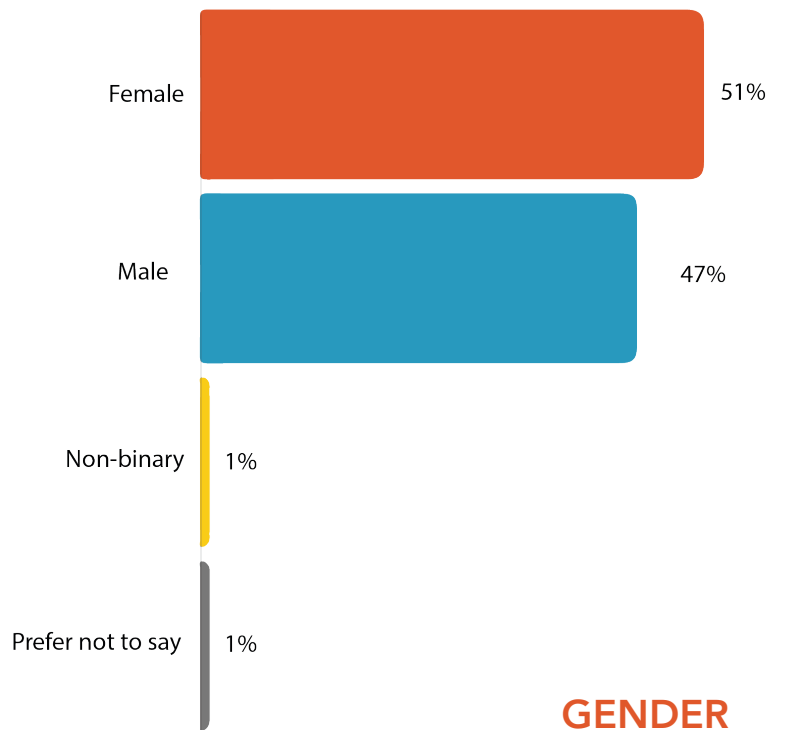
The second most popular activity for Adventure Voice members is overnight or multi-day tramping (84%). On average, respondents went tramping between three and six times in the previous 12 months, with 25% going seven times or more.

Of interest is that very few Adventure Voice members (4%) consider themselves to be a tramping beginner. Most consider themselves to be at an intermediate or advanced level. Aside from short or day walks, this experience level is the highest of all activities captured by the registration survey. Additionally, people who also participate in other activities are more likely to assess themselves as being an expert tramper.

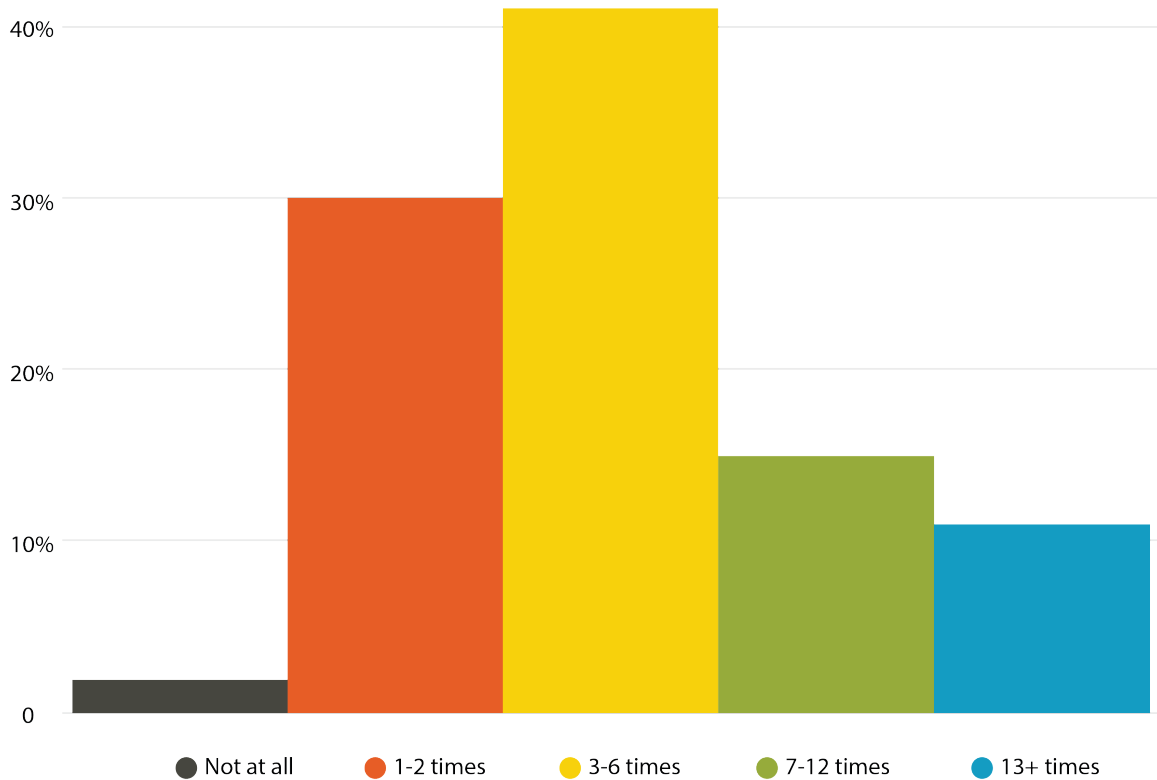
**OF 1679 SURVEYED OVERNIGHT OR MULTI-DAY TRAMPERS, ONLY 2% HADN'T BEEN ON AN OVERNIGHT OR MULTI-DAY TRAMP IN THE LAST 12 MONTHS**







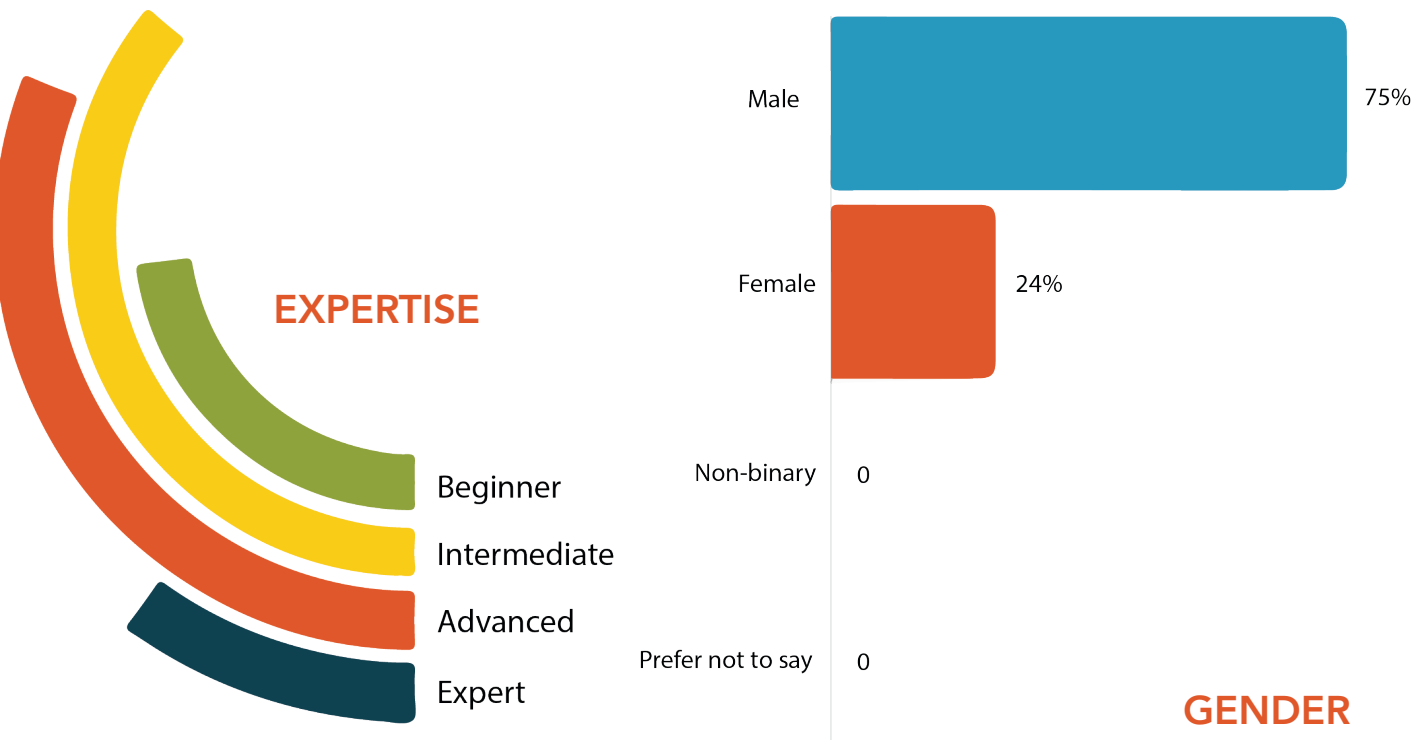
## OVERNIGHT OR MULTIDAY TRAMP FREQUENCY



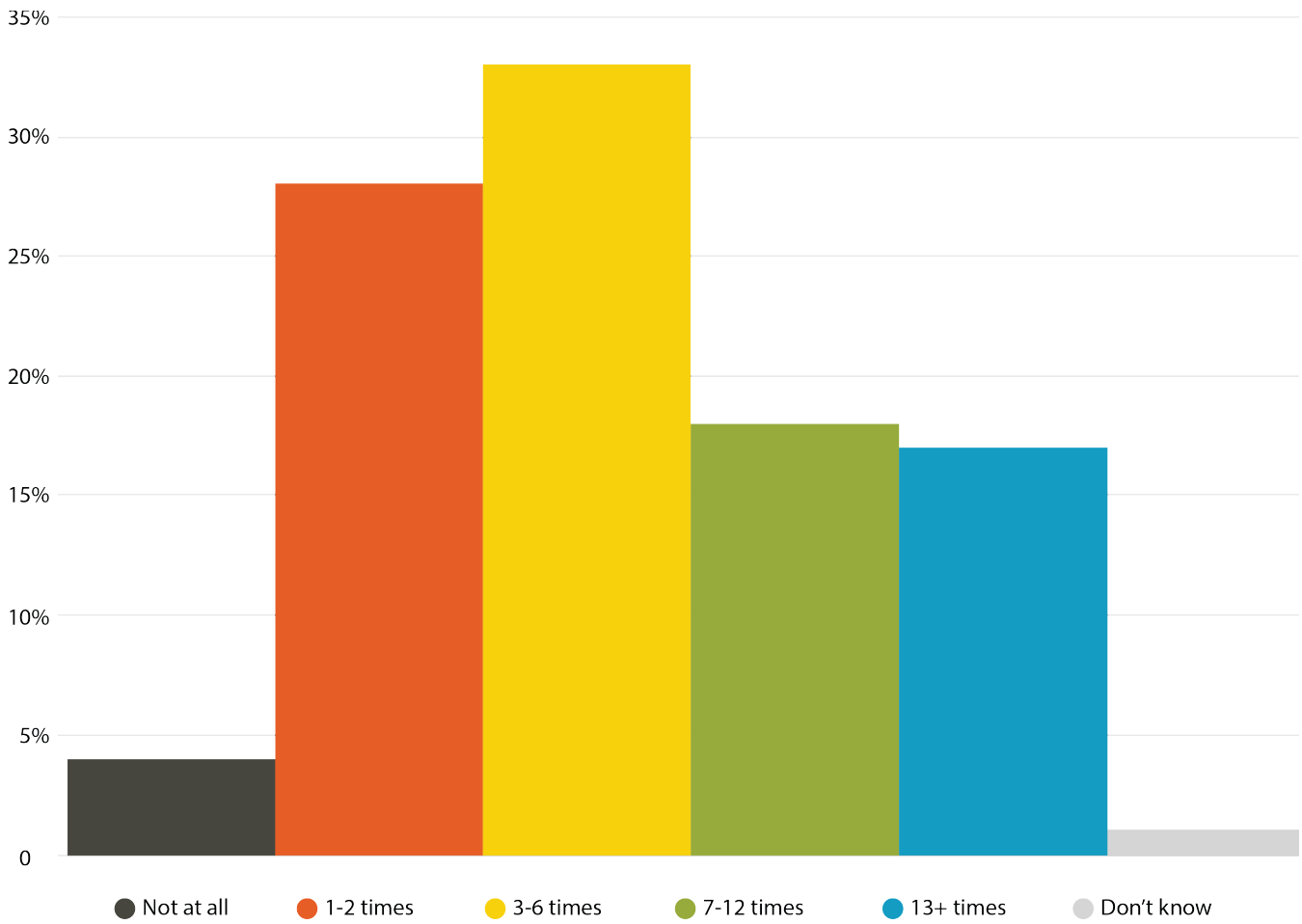
# HUNTING (OF ANY TYPE)

Adventure Voice members who hunt are more likely to assess themselves as a beginner hunter (23%) than a beginner at tramping (2%). This could be because hunting requires a slightly higher degree of skill for someone to consider themselves to be at an advanced or expert level. Having said this, these people head out to hunt slightly more frequently than to tramp, with 17% hunting more than an average of once a month.

Hunters are active in an average of 5.2 land-based recreation activities, with short walks, overnight or multi-day tramping, mountain biking, skiing or snowboarding within a ski area, and trail running being the top five other activities. Big Game (e.g., deer, goats, wallabies) is the most common animal type hunted, while Game Bird is the least common type.

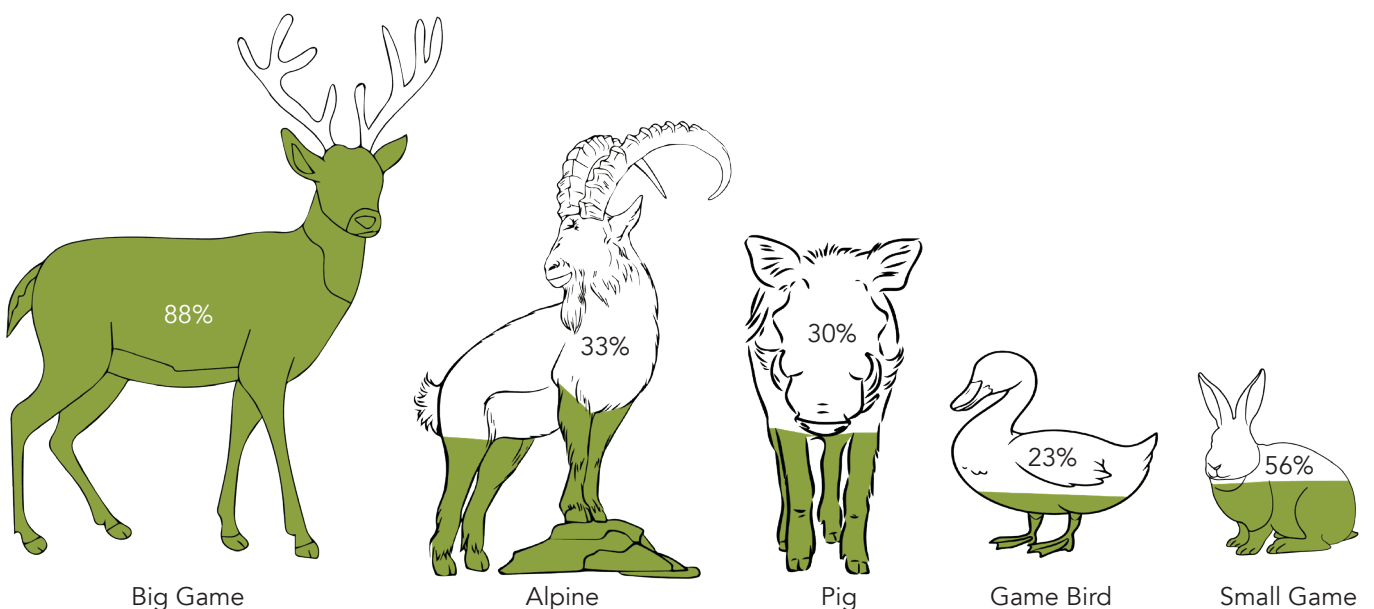


## HUNTING FREQUENCY



**THE 313 SURVEYED HUNTERS PARTICIPATED IN AN AVERAGE OF 5.2 ACTIVITIES**

## TYPES OF RECREATIONAL HUNTING





## MOUNTAINEERING (INCLUDING ALPINE ROCK CLIMBING)

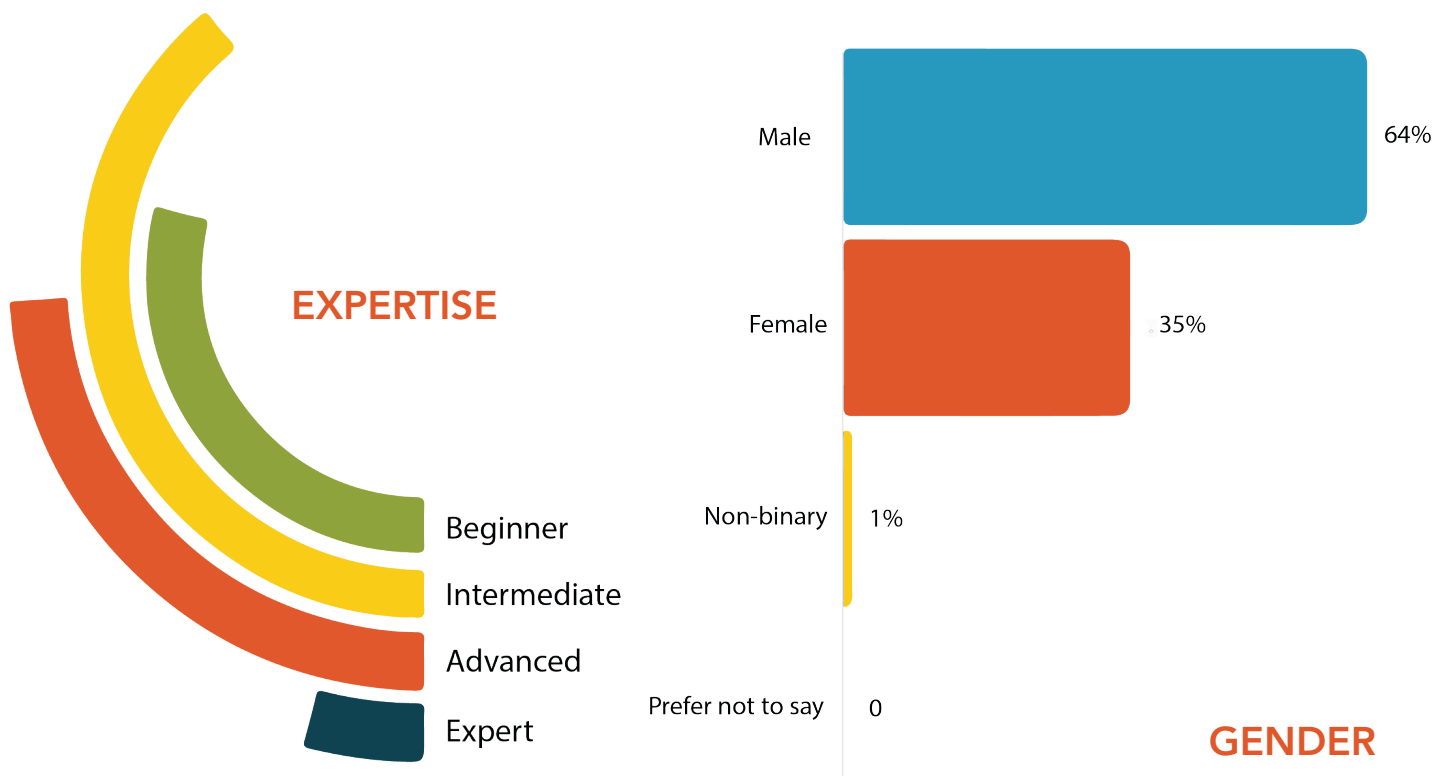
With 322 members (16%) who indicated they go mountaineering, the Adventure Voice community has a healthy base of mountaineers.

Of this Adventure Voice group, there is a balanced spread of experienced and less-experienced members, with only 9% considering themselves to be at an expert level.

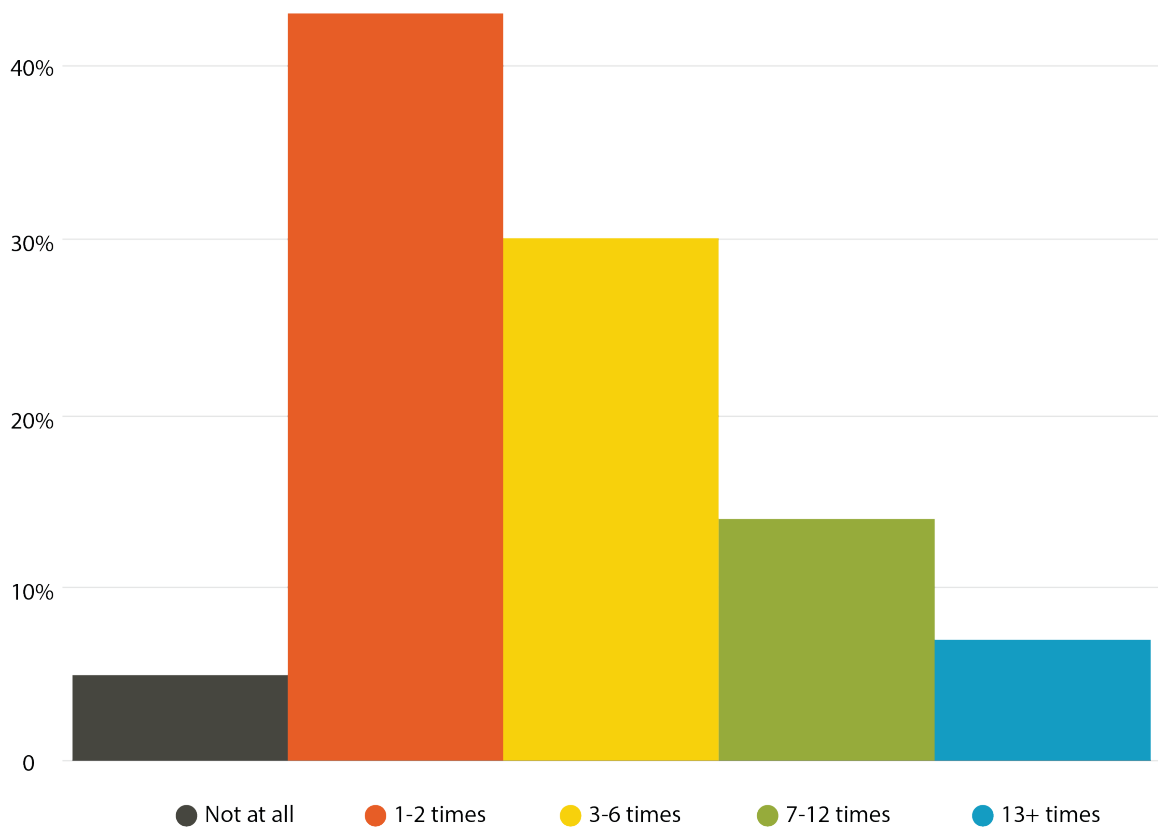
These members participate in an average of seven land-based activities, with overnight or multi-day tramping and short walks rated highest, followed by mountain biking, rock climbing, trail running and skiing or snowboarding within a ski area being the main other activities. Advanced and expert mountaineers are more likely to also participate in backcountry snowsports and packrafting.

### THE 322 SURVEYED MOUNTAINEERS PARTICIPATED IN AN AVERAGE OF 6.9 ACTIVITIES





## MOUNTAINEERING FREQUENCY

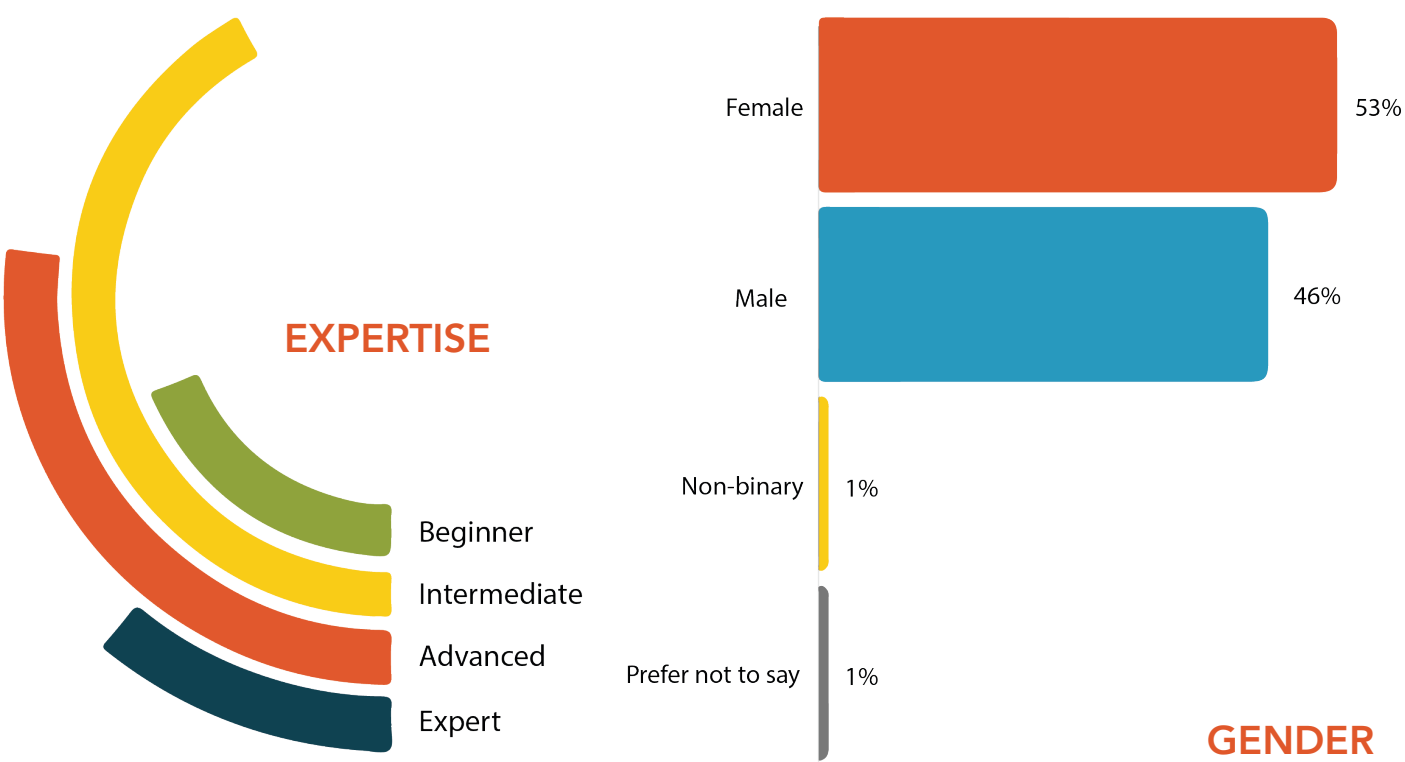


# TRAIL RUNNING

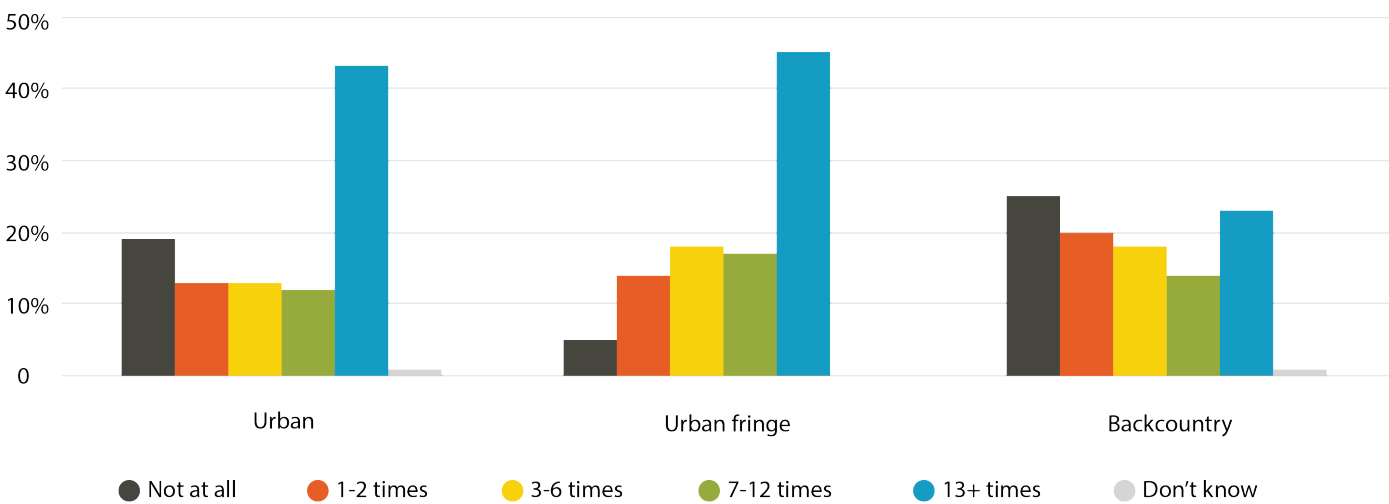
With 700 members (or 35% of the Adventure Voice membership) participating in trail running, this is also one of the most frequently participated in activities. Of respondents, 45% say they went for 13 or more trail runs in the past 12 months in urban fringe areas and 23% went for more than one run a month in backcountry areas in the same period.

This finding helps us to see that those who go for trail runs near urban areas are also going for regular runs further afield, where additional planning, clothing and equipment is required.

On average, people who trail run participate in 5.5 other land-based activities captured by Adventure Voice. The most popular activities are short walks, overnight or multiday tramping, mountain biking, skiing and snowboarding, indoor rock climbing, and mountaineering.



## TRAIL RUN FREQUENCY BY ENVIRONMENT



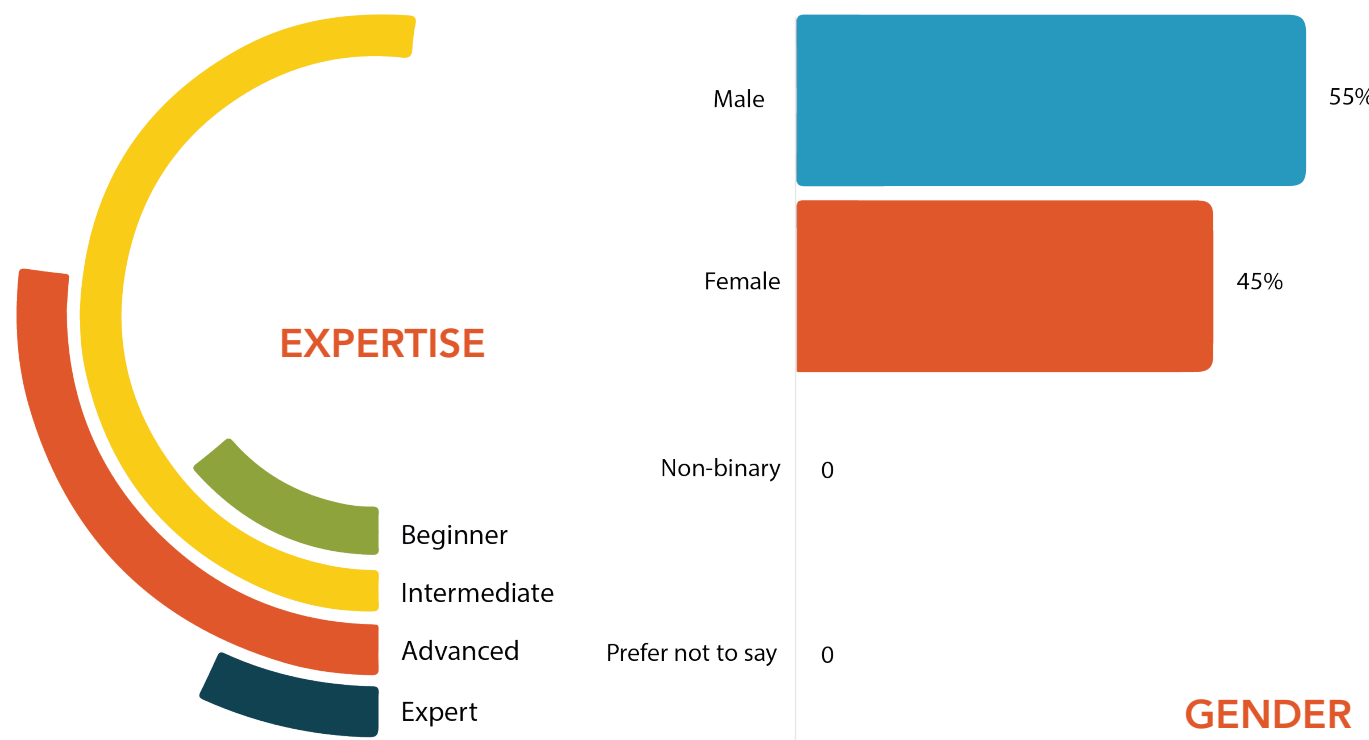


# MOUNTAIN BIKING

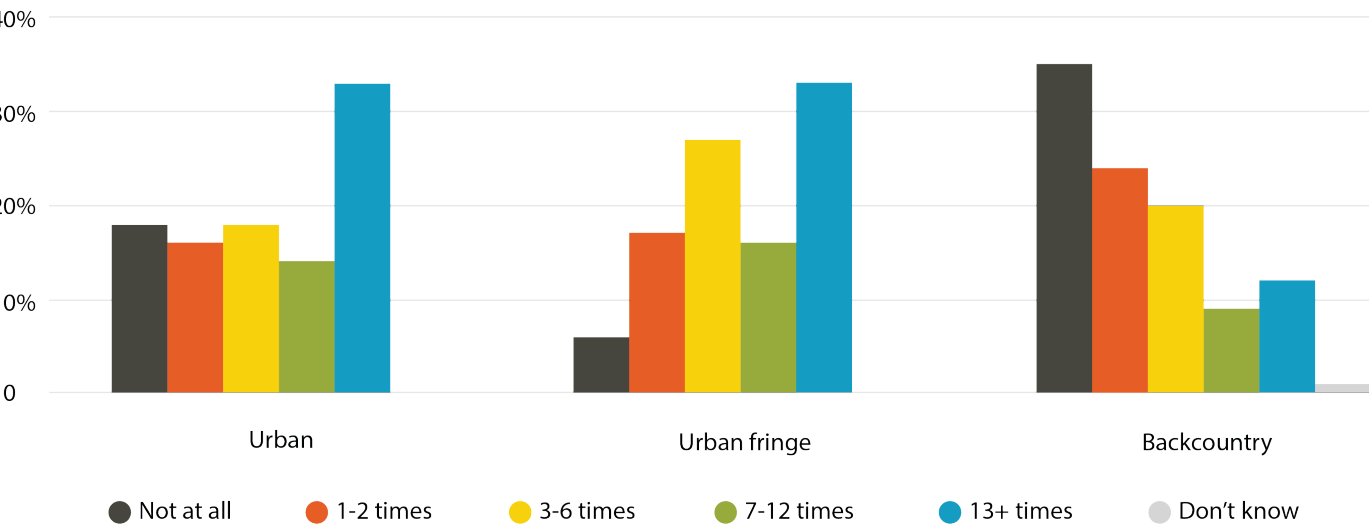
With 960 members (or 48% of the Adventure Voice membership) participating in mountain biking, it is the third most popular activity after short walks and overnight or multiday tramping. It is also the third most frequently participated in activity behind short walks and trail running, with 33% of respondents saying they had been for 13 or more rides in the past 12 months, both in urban and urban fringe areas, and 12% in backcountry areas. This is a very useful finding for us, as it helps to provide a breakdown of how frequently people ride outside urban areas.

On average, people who mountain bike participate in 5.2 other land-based activities captured by Adventure Voice. The most popular activities are short walks, overnight or multiday tramping, trail running, skiing and snowboarding, indoor rock climbing, and mountaineering.

Mountain biking is the only activity where the majority of respondents consider themselves to be at an intermediate level. Only 7% consider themselves an expert.



## MOUNTAIN BIKING FREQUENCY BY ENVIRONMENT

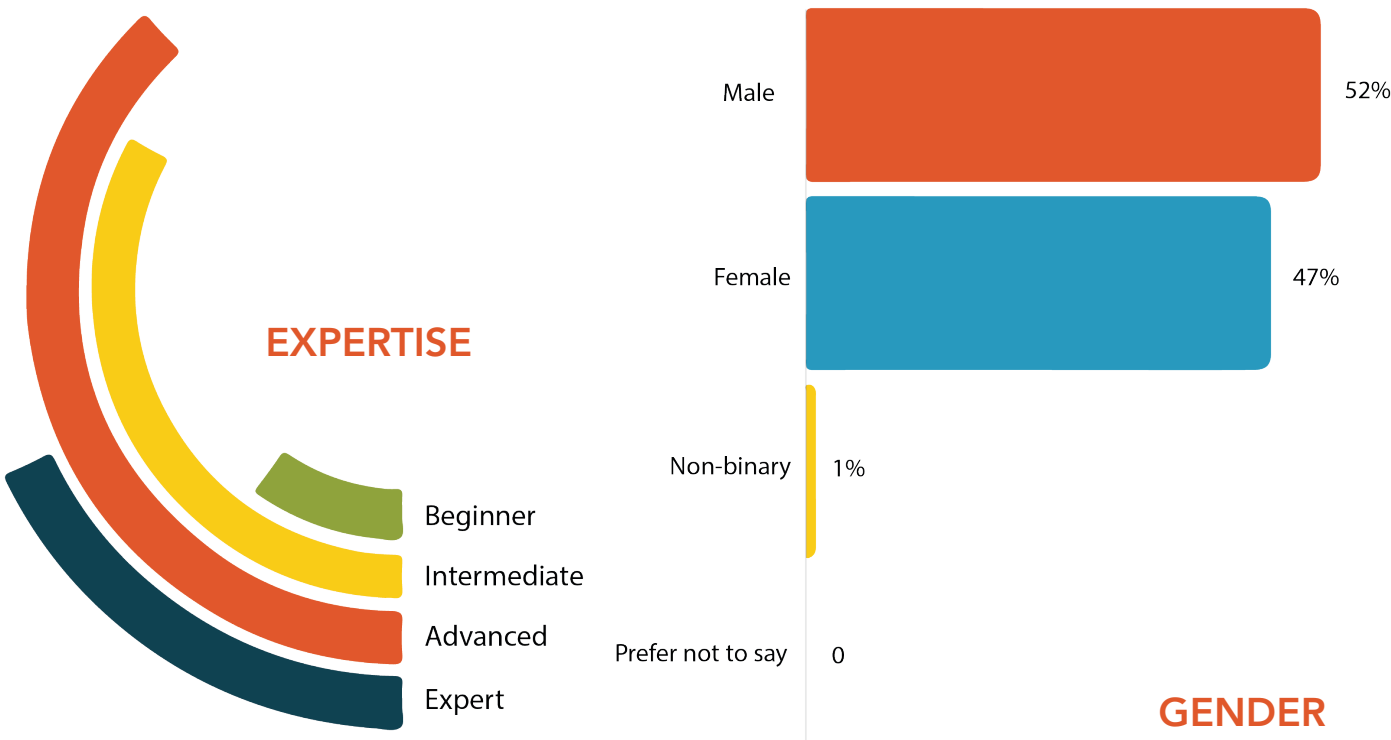


# SKIING OR SNOWBOARDING WITHIN A SKI AREA

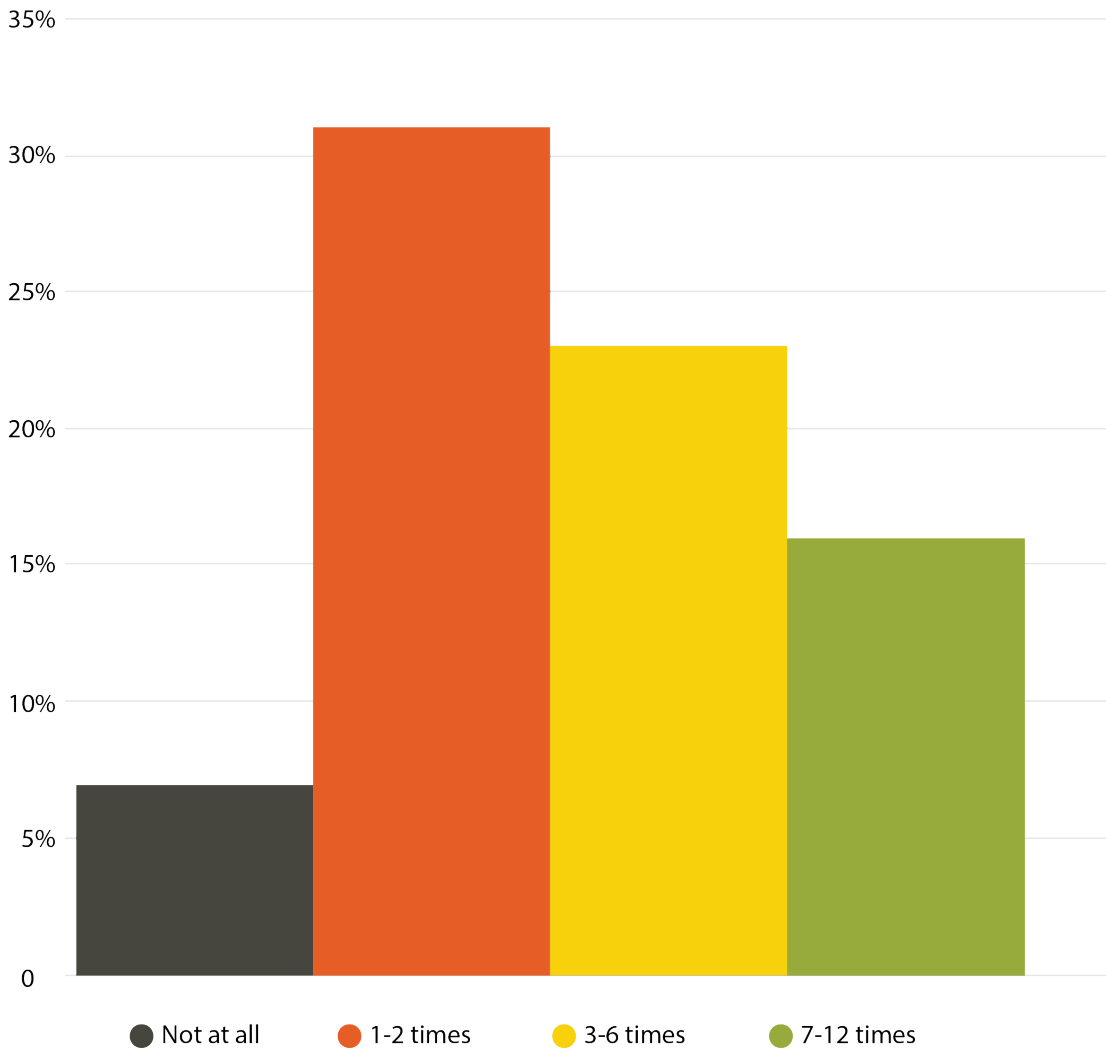
At 624 members (or 31% of the Adventure Voice membership), skiing or snowboarding within a ski area is the fifth most popular activity. Of respondents, the frequency of participation is distributed widely, with 24% going more than 13 times in the past year and 31% going only once or twice.

In support of this spread, there is also a balance of experienced and less-experienced members. Of note, however, other than walking and tramping activities, skiing and snowboarding is the only activity in which the largest group of respondents consider themselves to be at an advanced level.

Skiers and snowboarders participate in an average of 5.8 other land-based activities. Overnight or multiday tramping and short walks rated highest, followed by mountain biking, trail running, backcountry snowsports and indoor rock climbing.



## SKI/SNOWBOARDING FREQUENCY



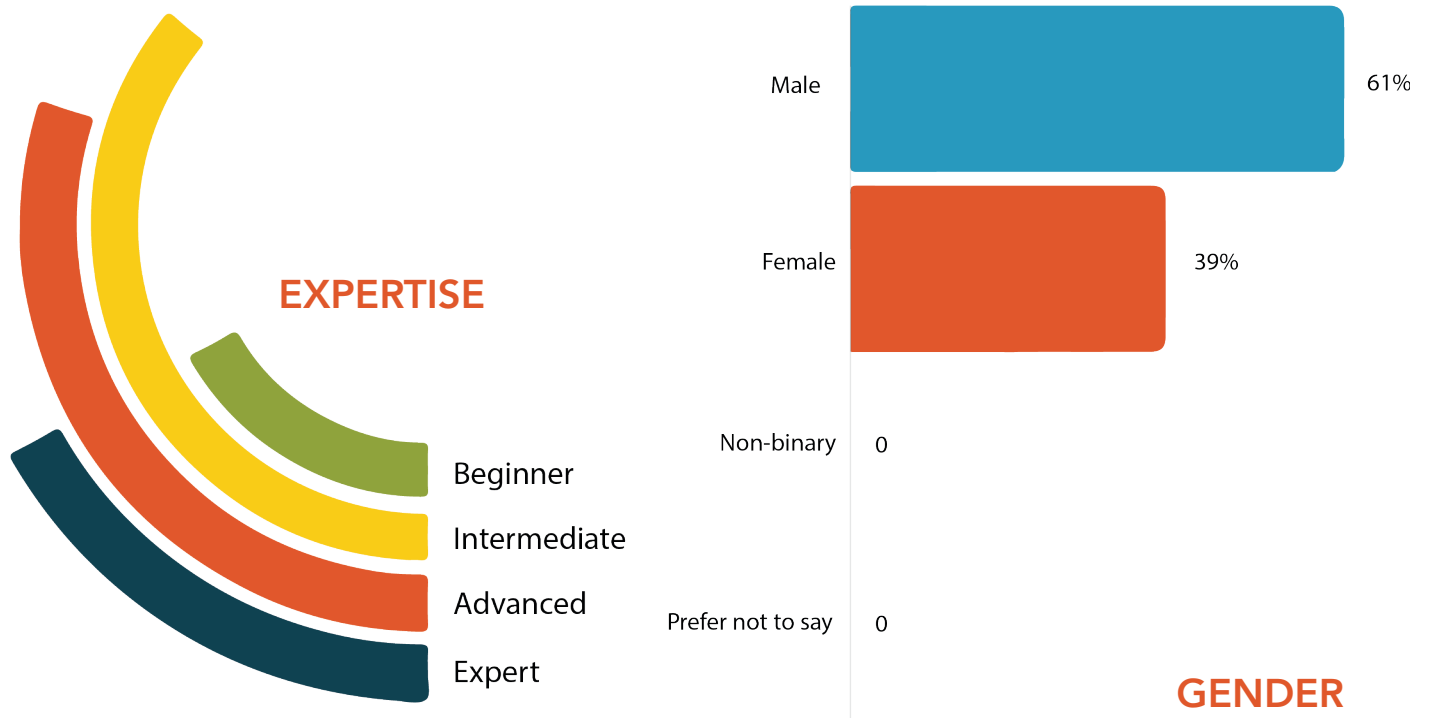
**THE 624 SURVEYED SKI/ SNOWBOARDERS PARTICIPATED IN AN AVERAGE OF 5.8 ACTIVITIES**

## BACKCOUNTRY SKIING OR SNOWBOARDING (INCLUDING SKI TOURING)

There is no national estimate of participation in backcountry snow sports, which involves skiing and snowboarding outside ski area boundaries. Therefore, having this activity within Adventure Voice will help considerably in reaching this group and understanding their skills, motivations and knowledge. Of respondents, 227 stated that they go into the backcountry skiing or snowboarding, with an even balance between beginners and experts.

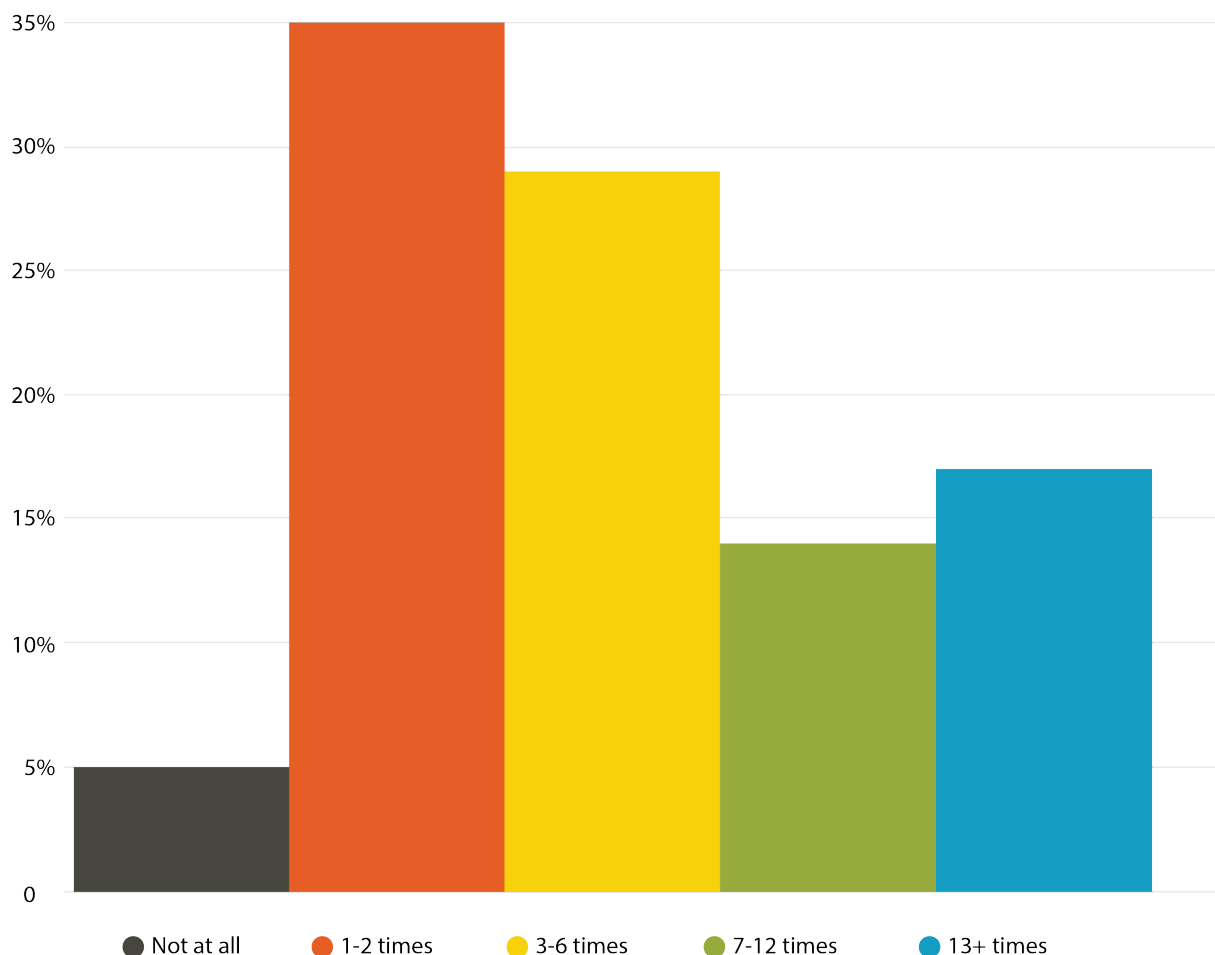
People who selected backcountry snow sports as one of their chosen activities (n=227) participated in the greatest number of activities, with more than seven on average.





THE 227 SURVEYED BACKCOUNTRY SKIERS/  
SNOWBOARDERS PARTICIPATED IN AN AVERAGE  
OF 7.4 ACTIVITIES

**BACKCOUNTRY SKIING OR SNOWBOARDING FREQUENCY**



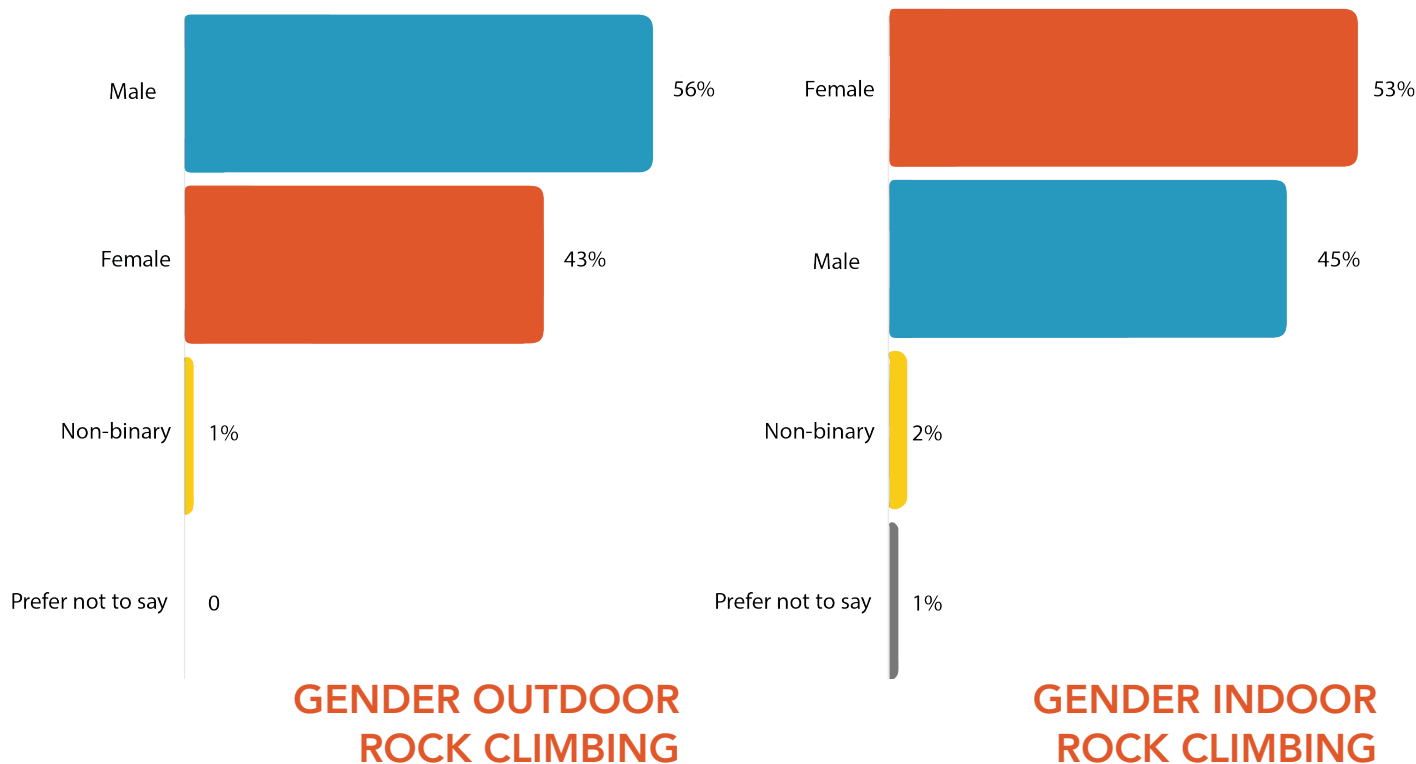
## ROCK CLIMBING (INCLUDING BOULDERING)

Although indoor climbing is not technically an outdoor activity, it generally requires the same skills and equipment as outdoor rock climbing and many indoor climbers also climb outdoors, so we have included this in the Adventure Voice community and registration survey. Additionally, in other research, rock climbing is not always distinguished between indoor and outdoor. By including both activities in Adventure Voice, we can compare the number of people who climb outdoors with those who climb indoors. We are particularly interested in frequency, given the relative ease of access to indoor climbing venues in many urban areas, compared to outdoor sites.

Of respondents, 298 people climb outdoors, while 381 climb indoors. While most people that participate in one also participate in the other, this is not always the case, with 75% of outdoor climbers also climbing indoors, while 59% of indoor climbers also climb outdoors. Outdoor climbers are also more likely to participate in mountaineering, mountain biking and back country skiing, while indoor climbers are more likely to go trail running.

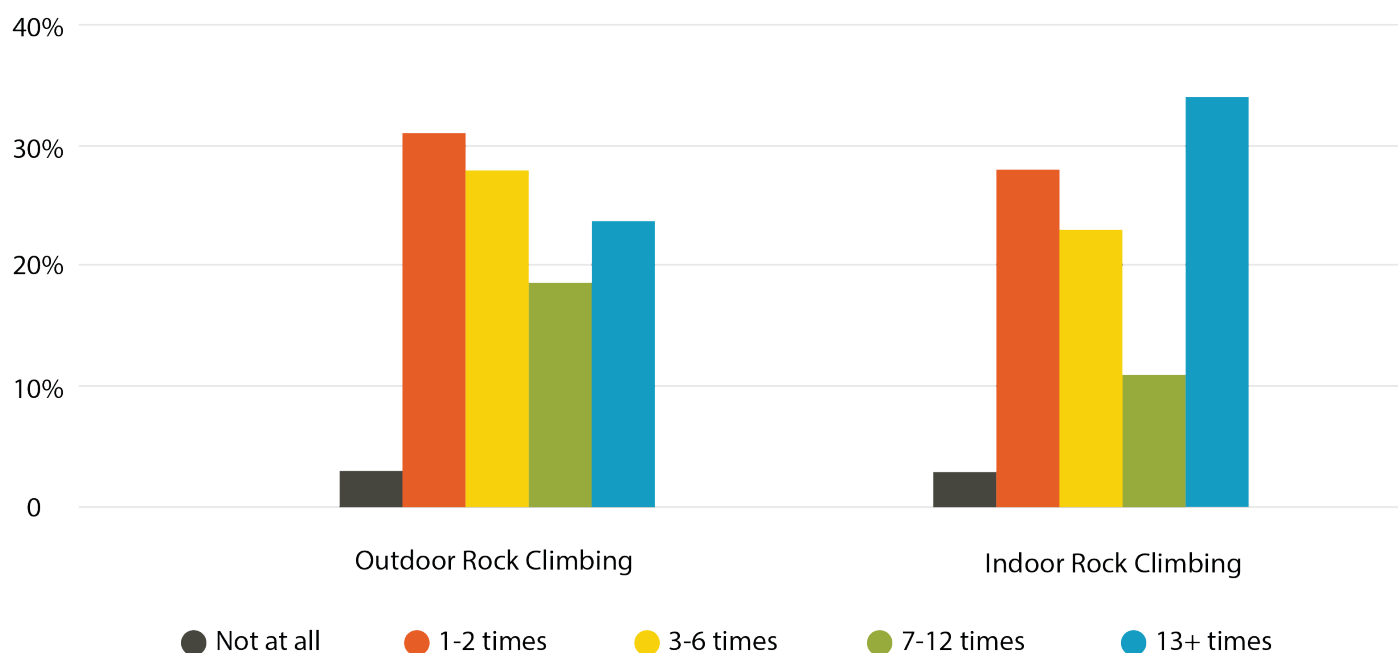
Unsurprisingly, indoor climbers undertake this activity more frequently than outdoor climbers, with 34% climbing more than once a month.





**THE 298 SURVEYED OUTDOOR ROCK CLIMBERS PARTICIPATED IN AN AVERAGE OF 7.3 ACTIVITIES WHERE AS THE 384 SURVEYED INDOOR ROCK CLIMBERS PARTICIPATED IN AN AVERAGE 6.7**

## ROCK CLIMBING FREQUENCY

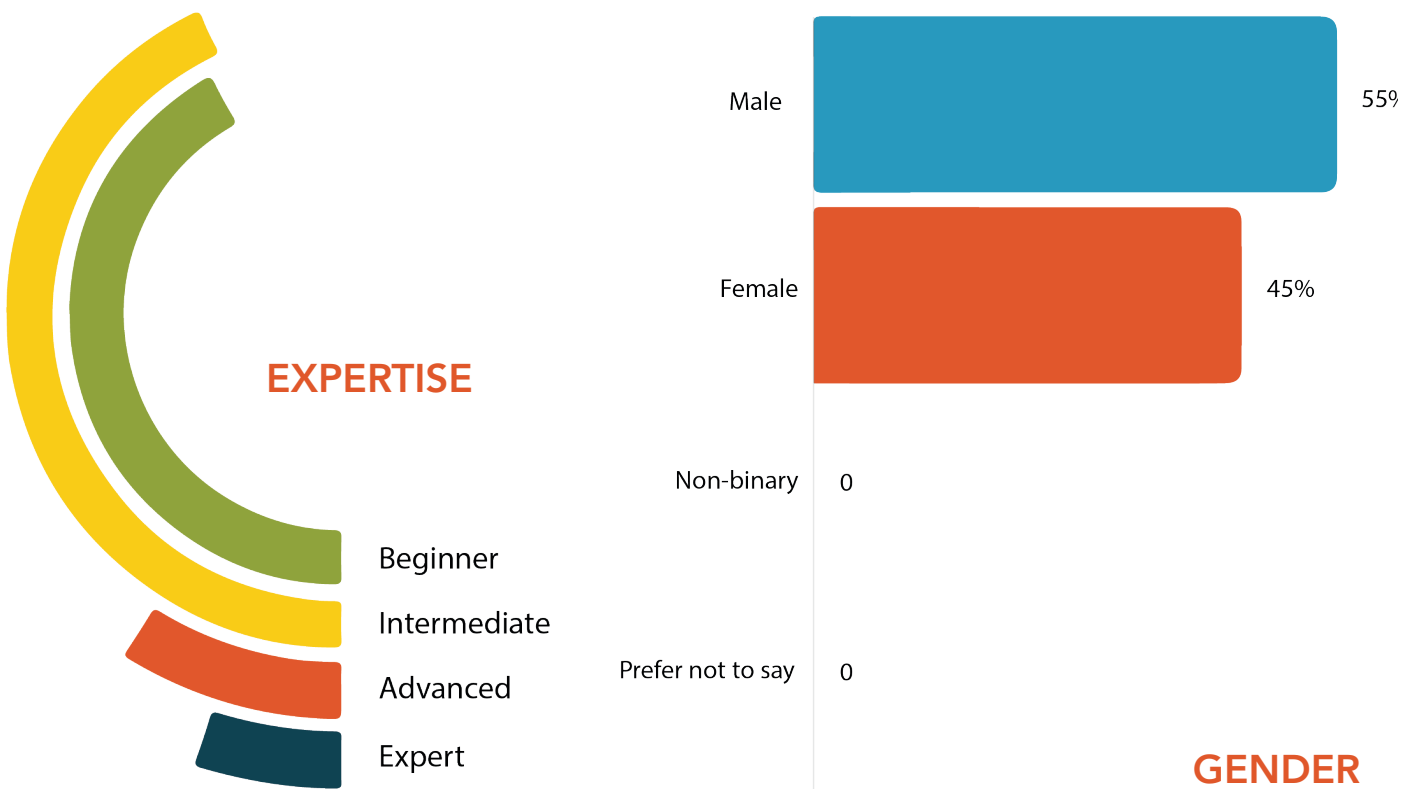




# PACKRAFTING

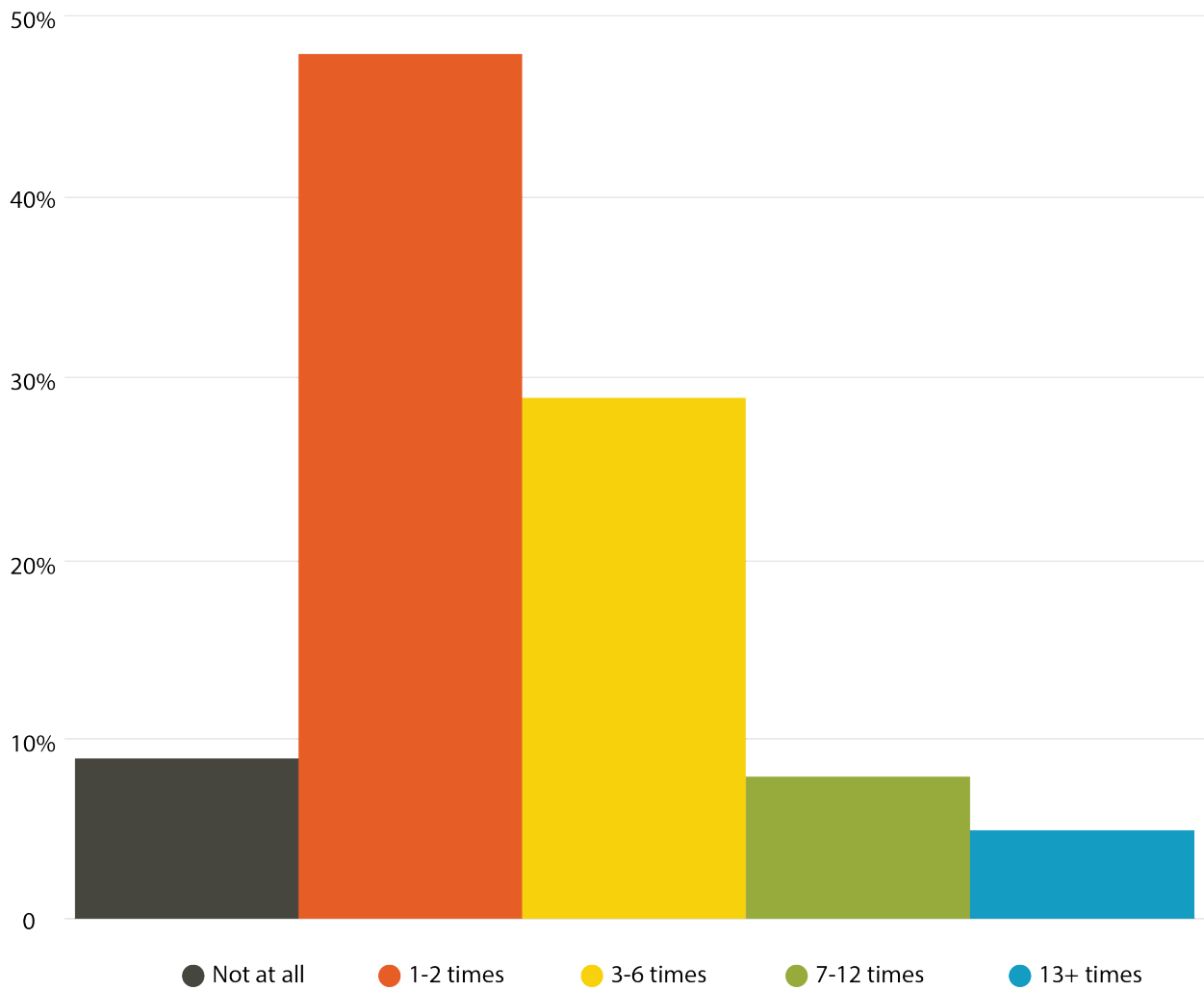
Like indoor rock climbing, some may argue that packrafting is not a land-based outdoor recreation activity, given that this activity occurs on water. However, it was offered as an activity in the registration survey as packrafts are often carried as a means of transportation to get across or down a waterway while participating in another land-based activity, such as tramping or hunting, and there has been very little research done on this activity.

Although the base number of packrafters is small (n=106), and this activity is not as frequently participated in compared with most other activities (with most going a maximum of twice in the past year), those that packraft participate in an average of 7.3 outdoor activities. and are more active than others in each of them. This is most pronounced in the number of overnight tramps they go on, with 28% doing 13 overnight or multiday tramps in the past year, compared with 11% of the total population of trampers. They are also far more likely to go mountain biking (77%) than the average (48%). The majority participate in short walks, tramping, trail running and skiing or snowboarding within a ski area, showing that this small group is highly active in the outdoors. They do, however, spend more days participating in other activities than they do packrafting, with only 13% doing this more than six times in the past year.



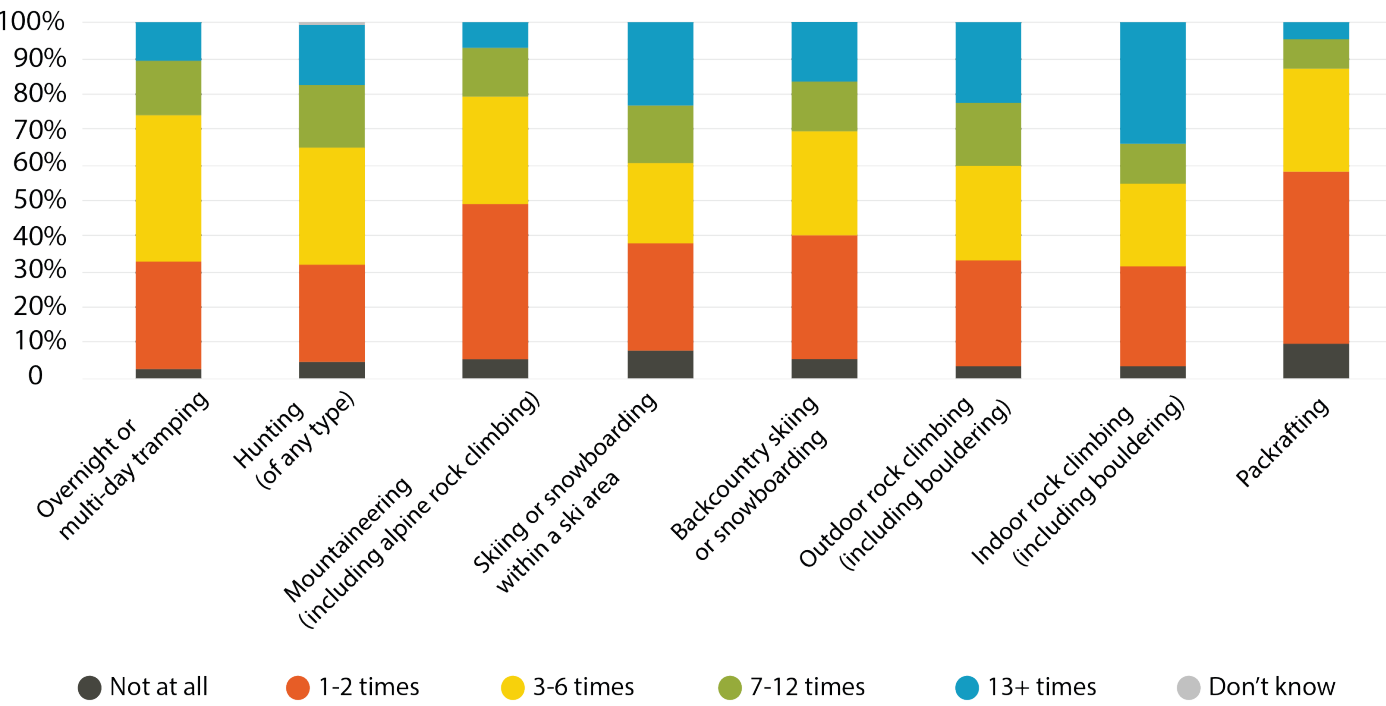
THE 106 SURVEYED PACKRAFTERS PARTICIPATED IN AN AVERAGE OF 7.3 ACTIVITIES

## PACKRAFTING FREQUENCY

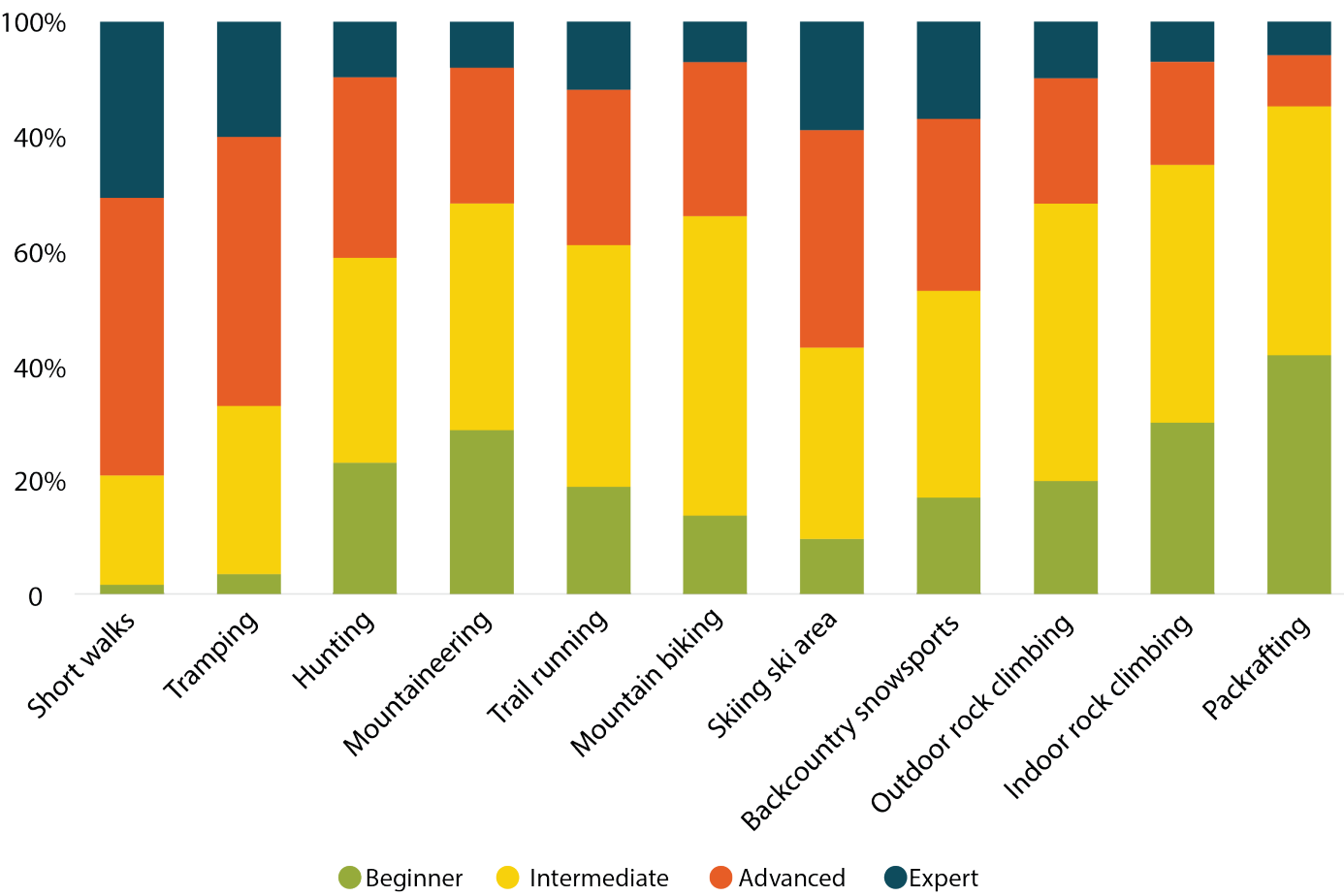


# ALL ACTIVITIES IN COMPARISON

## FREQUENCY OF PARTICIPATION

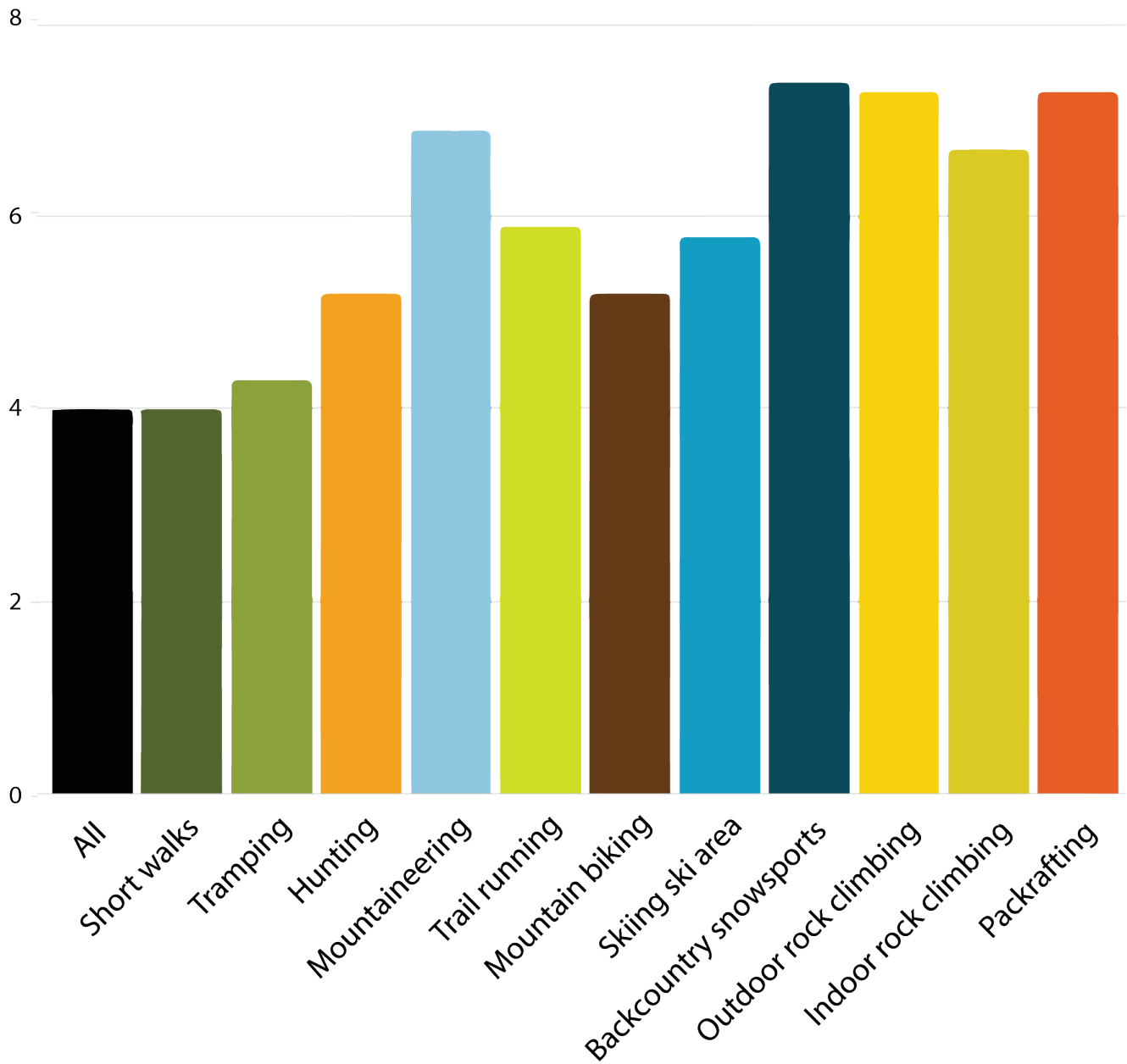


## PERSONAL ABILITY





## AVERAGE NUMBER OF ACTIVITIES



# COMPARISON

## WITH THE ACTIVE NZ SURVEY

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Sport NZ's Active NZ survey is a continuous survey, which captures participation data for many sport and active recreation activities undertaken by NZ adults. Between 2017 and 2023, more than 125,000 people have completed this survey. In 2023, this was 15,836 unique NZ adults.

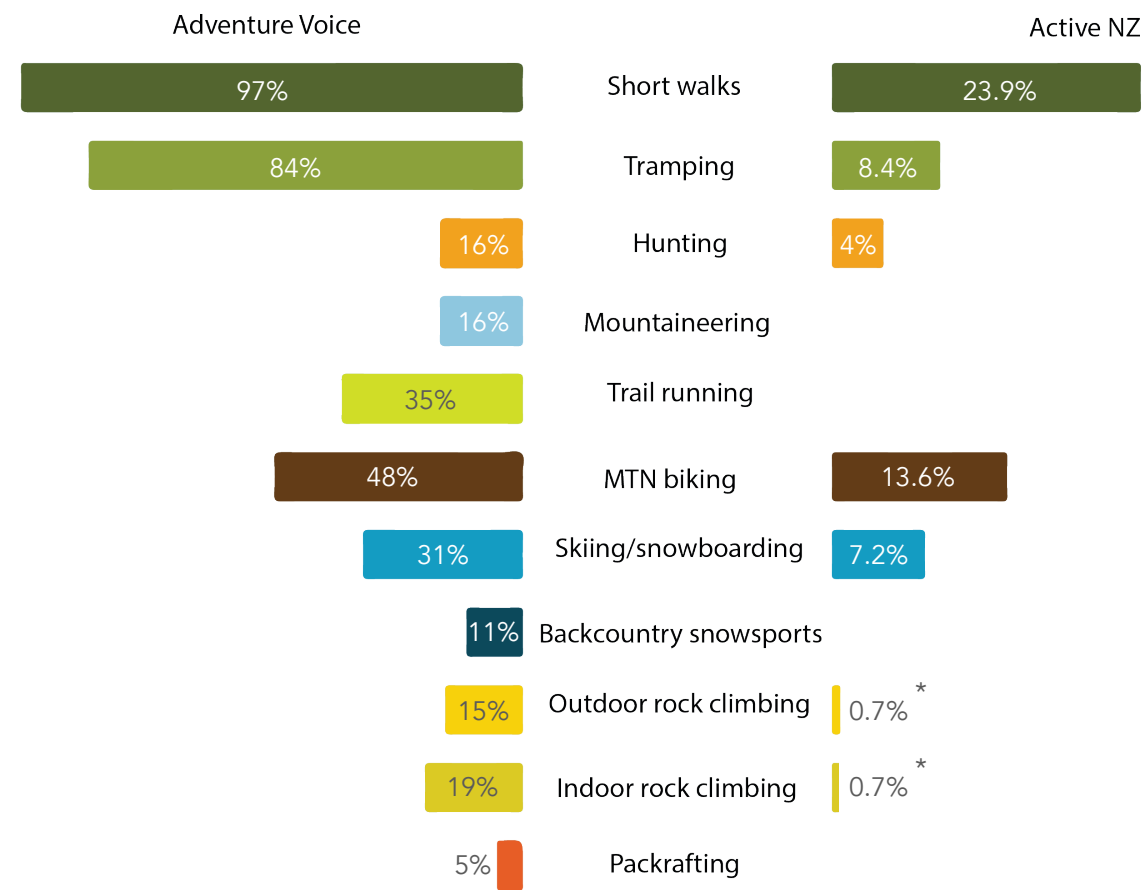
The data is then weighted to reflect New Zealand's diverse population (based on gender, age, region, ethnicity, household income and household size). For more information about the Active NZ survey, visit Sport NZ's website <https://sportnz.org.nz/research-and-insights/surveys-and-data/active-nz/>.

One of the key differences between the Active NZ survey population and the Adventure Voice population is that Active NZ respondents are randomly selected from the NZ Electoral Roll, with an invitation to respond to the survey (opt-in). This enables Active NZ to be used to determine percentage of the NZ adult population who participate in various activities.

Adventure Voice members were actively recruited from the outdoor recreation community via various targeted methods. This means that the Active NZ survey captures a much broader group of people, many of which don't participate in land-based outdoor activities, whereas the Adventure Voice membership solely consists of people who actively participate in land-based recreation activities.

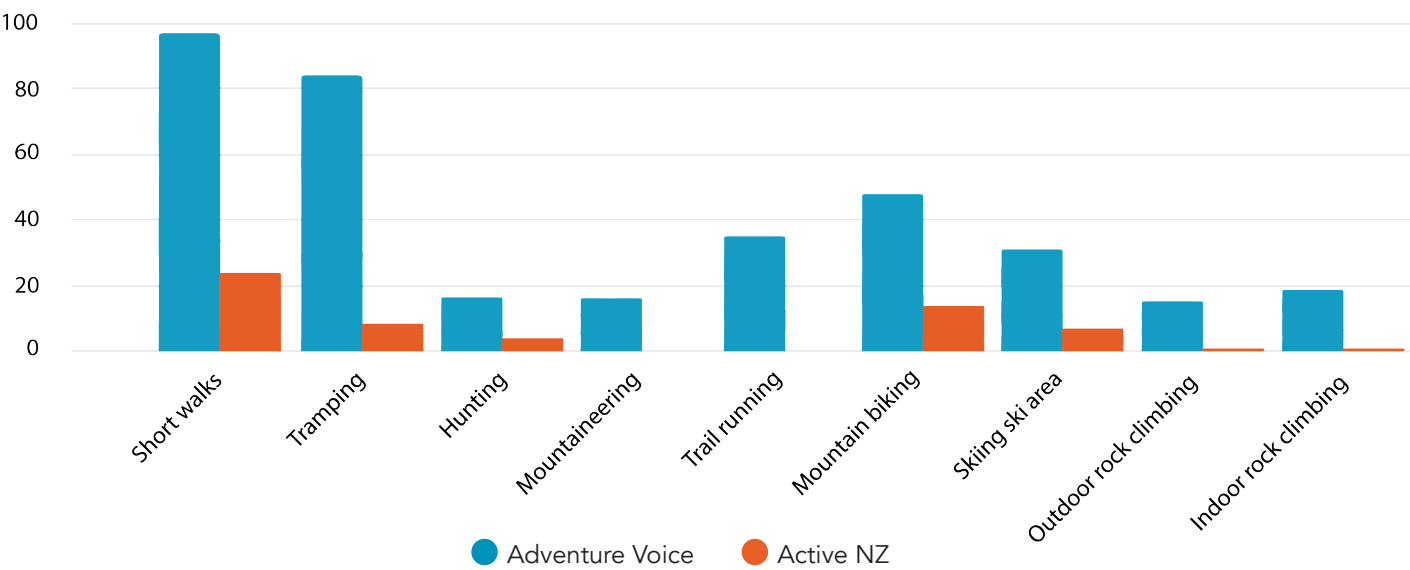
Additionally, the Active NZ survey does not measure all activities that Adventure Voice respondents participate in, nor does it measure all activities in as much detail. For example, Active NZ asks about running/jogging, but not the subset group of trail runners, which is more relevant to outdoor recreation participation. This leads to different results for the percentage of each population that recreates in outdoor activities.

# ACTIVITIES PARTICIPATED IN THE LAST 12 MONTHS



\* Active NZ does not differentiate between indoor and outdoor rock climbing

## % OF THE SURVEY POPULATION THAT PARTICIPATES IN EACH ACTIVITY





To more easily compare results, and to potentially extrapolate to predict total NZ participation in activities not captured by the Active NZ survey, we need to calculate a weighting score.

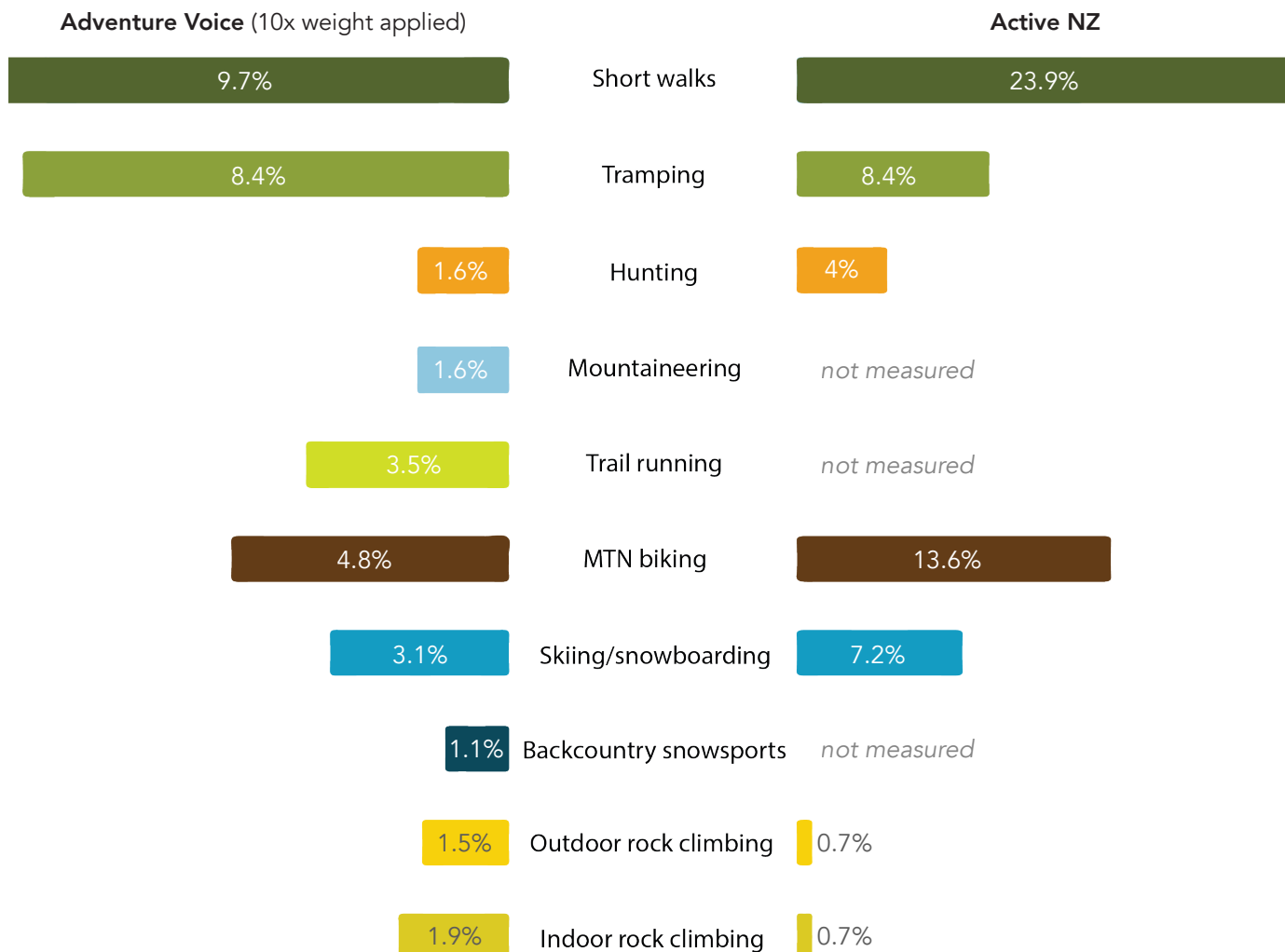
Given the size discrepancy between a large number of Adventure Voice members that indicate their prevalence for overnight or multiday tramping, versus the much smaller number of Active NZ respondents that indicate the same, combined with the very close definition of this activity in each survey, this is our best measure of comparison.

In 2023, 8.4% of Active NZ respondents said that they have been overnight tramping within the past 12 months, while 84% of Adventure Voice members said the same. A simple weighting, is to divide the Adventure Voice percentage by the Active NZ percentage, giving us precisely a factor of 10. (i.e.,  $84/8.4=10$ ).

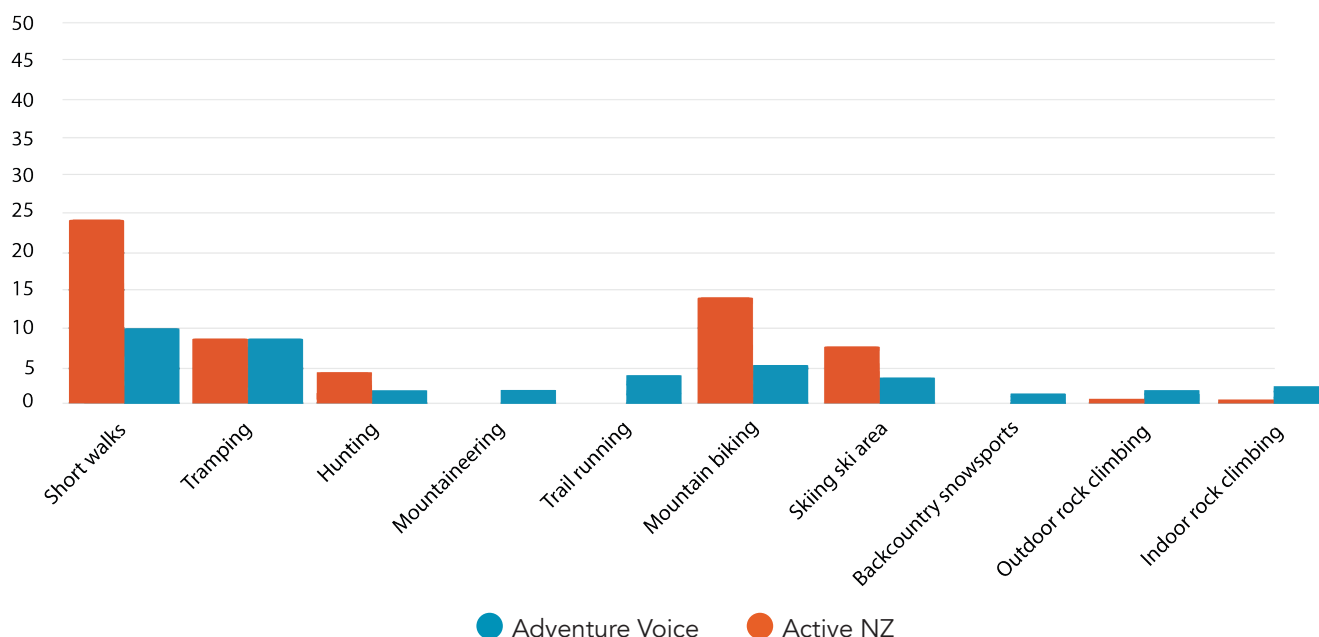
This equation suggests that the Adventure Voice members that have so far signed up are significantly weighted towards overnight tramping, while a smaller proportion of the population that goes for short walks, but not overnight tramps, have registered for Adventure Voice. This would make sense, given that MSC is well known and respected within the tramping population, but less well known with groups that simply go for short walks, often within or close to an urban area.

This approach also suggests that Adventure Voice members are under-represented by hunters, mountain bikers, and skiers or snowboarders within a ski area. This is quite possible. It also comes closer to a match for rock climbers, although these groups are still represented within the Adventure Voice community at around two to three times larger than the Active NZ survey population.

## POPULAR ACTIVITIES



## ESTIMATED % OF NZ ADULT POPULATION THAT PARTICIPATES IN THE FOLLOWING ACTIVITIES USING FACTOR OF 10



While comparing activities which are measured by both surveys is interesting, applying this logic to activities which are not measured within the Active NZ survey, including trail running, backcountry skiing or snowboarding and mountaineering helps us to estimate the percentage of New Zealand adults who participate in these less popular activities.

For example, the logic of using a factor of 10 would suggest that around 3.5% of the NZ adult population go trail running, which equates to around 146,000 people. However, as Adventure Voice does not have a large population sample compared with the likes of a census or the Active NZ survey, this figure will only ever be a rough approximation. This will also likely change over time as the number of Adventure Voice members changes, but we can refine it by using other measures such as social media users who identify with related interest groups, other forms of participation data, such as Strava, or the number of unique visits to sites, such as the NZ Avalanche Advisory.

# DEMOGRAPHIC COMPARISON

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When it comes to comparing demographic information and geographic spread, this is complicated by the fact that the Active NZ dataset is weighted for diversity. Therefore, any comparison we can give when it comes to demographics is a comparison with the general NZ population.

Having said that, this is a valid comparison. In general, the Adventure Voice population as at 8 August 2024 is more predominantly made up of those aged over 35 (79%) than the weighted Active NZ data (64%). Interestingly, however, the Active NZ results show that respondents have a much higher annual income, with 62% earning more than \$100,000 per year, compared with Adventure Voice members for whom only 32% earn over \$100,000.

When it comes to ethnicity, the Adventure Voice community is underrepresented by Māori, Pasifika and Asian populations, although Active NZ respondents are more predominantly NZ European (89%) than Adventure Voice (82%).

Geographically, Adventure Voice membership is slightly higher with South Island residents (42%) than Active NZ (30%). Regions where the Adventure Voice community is more predominantly represented than Active NZ include Otago and Wellington, whereas Northland, Auckland and Bay of Plenty have a lower proportion of Adventure Voice members.



# CONCLUSION

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The Adventure Voice membership climbed very quickly between its launch in March 2024 to early August 2024 when the milestone of 2,000 members was reached. This has shown a strong interest from the more active component of the outdoor recreation community to want to contribute to further insight into activities in the interests of safety.

In general, this population is very active in the outdoors and participates in a range of outdoor activities, with the average being four land-based activities. The most frequently participated in activity (both by volume of participants and by frequency of activity) is short or day walks. This is closely followed by trail running and mountain biking, which are also activities that can be participated in close to where participants live. Other activities commonly participated in include tramping and downhill skiing/snowboarding.

Those that participate in activities outside of the five most popular activities (for example those that participate in mountaineering, rock climbing and back country skiing/snowboarding) participate in an average of seven activities. These participants are generally younger and spend more days in the outdoors.

At the time of producing this report (December 2024), the Adventure Voice community has grown to over 3,500 members. Therefore, this report provides data and insights of a snapshot in time and is not necessarily reflective of the growing and evolving community. MSC will continue to observe changes between the publishing of this report and future groupings as we continue to learn more about the outdoor community.

So far, we have asked this community about a range of issues and preferences. These topics have included several 'quick-fire' surveys which are generally three questions long, and one longer nine-minute survey. The quick-fire questions have included finding out how many people use their phone to aid with navigation, what their favourite warm drink is, what months of the year they tramp and whether they go into avalanche terrain in winter, what situations have caused them to change their plans, and whether they use Plan My Walk so this tool can be improved in future. We've also asked the hunting community a specific set of questions around how they build fitness ahead of 'The Roar'.

The longer survey, developed in partnership with the Land Safety Forum, asked participants about their tramping skills and what their aspirations were for improving their skills. A report will be delivered on this topic at the end of February 2025.

