# VISITOR RISK PERCEPTION AND MESSAGING INFLUENCE

Final Research Report

Prepared for Land Safety Forum Te Ope Tautiaki Whenua

June 2025



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## INTRODUCTION

#### **Background**

The Land Safety Forum (LSF) is a land safety sector-wide network, made up of around 15 agencies and organisations (central and local government, and NGOs). It provides a mechanism for agencies and organisations to work together in a coordinated and integrated way to reduce preventable search and rescue (SAR) incidents. The purpose of the LSF is to collaborate on complex land safety issues that require networked and systemic solutions.

One of the LSF's key workstreams is data and insights. A stock take of the sector's research and data identified a need to carry out a second iteration of a Visitor Risk Perception and Messaging Influence study. The survey for the first report was undertaken over the 2018/19 and 2019/20 summer seasons. The current survey was completed over the 2024/25 summer, at eight sites across Aotearoa.

#### **Research Objectives**

The purpose of the 2024/25 Visitor Risk Perception and Messaging Influence research project is to:

- gain a current state understanding of visitors' perception of risks at place, and how much risk they think they are exposed to;
- identify where visitors get their information from, and the influence that information has on visitors' risk-related decision-making; and
- compare the updated findings with those from the first survey and analyse why any differences might exist.

There is also interest in understanding a) what impact the COVID-19 pandemic may have had on visitor risk perception, and b) any changes in the influence of messaging and information sources over time.

The findings will inform subsequent initiatives by the LSF, and its members aimed at improving safety and reducing search and rescue incidents.

#### Approach (Overview)

This research was conducted over six key stages:

- 1. Qualitative focus groups, analysis and reporting.
- 2. Pre-hike survey quantitative intercept survey.
- 3. Post-hike survey follow up online survey with hikers who had completed the pre-trip survey.
- 4. Data analysis and comparison with previous survey results.
- Quantitative reporting.
- 6. Presentation to LSF members.

The qualitative focus groups were conducted in Christchurch in July 2024, with a report on key insights provided in November 2024. The key qualitative findings are also appended to this report.

Quantitative data collection commenced in November 2024, to coincide with the beginning of the peak hiking season and was completed in February 2025. Survey fieldwork was undertaken at eight sites selected by LSF, based on known history of incidents and accidents, as well as their known popularity with international visitors.

The eight sites were Tongariro Alpine Crossing, Fiordland – Gertrude Saddle Route, Aoraki / Mt Cook – Mueller Hut Route, Arthur's Pass – Avalanche Peak, Nelson Lakes – Angelus Hut Route (Robert Ridge), Te Papa-Kura-o-Taranaki – Mt Taranaki Summit Climb, Mt Aspiring National Park – Brewster Track, and Waitakere Ranges Regional Park – Ōmanawanui Track.

A total of 80 days of interviewing was completed, yielding n=2,090 completed surveys; n=1,623 pre-hike and n=467 post-hike.

Demographic profile data was gathered for a total of 3,181 hikers i.e. of all party members / companions of the n=1,623 hikers who completed the pre-hike survey.

Further detail on the quantitative research methodology may be found in the Appendix to this report.



## **KEY FINDINGS**

#### **Current State Understanding**

#### **Visitor Perception of Risk**

- Perceived risk of death has declined since 2020:
  - "Moderate" risk has halved (from 42% to 20%);
  - "Minimal" and "Very Low" risk has doubled (from 8% to 21%, and from 12% to 20% respectively); and
  - "High" and "Very High" risk has decreased to near-negligible levels.
- Hikers typically overestimated track difficulty pre-hike and revised their assessment of risk downwards post-hike.
- Most felt prepared for their hike, but only one-third believed they could survive a night outdoors — this confidence dropped post-hike.
- Overall, the trend since 2020 is toward lower perceived risk. This shift may reflect better access to information, but may also indicate (over)confidence, which has implications for safety messaging and communication of risk.

#### **Perceived Safety Support**

- Reliance on companions and organisations for safety has declined significantly since 2020:
  - Companions (down 17% overall)
  - Organisations (also down 17% overall)
- Perceived safety support from others on the track also fell, post-hike.
- Trust in popular tracks being "safest" also declined, especially amongst New Zealand hikers (down by 16%).

#### Information Use & Influence on Risk Decisions

#### Information Use

- Visitors used an average of three sources when planning.
- Top sources were the DOC website, family/friends, people who have done the tramp/hike and mobile information apps.
- International hikers are more likely to use mobile information apps, social media, official tourism websites and guidebooks, while New Zealand hikers are more likely to use information from people they know and DOC brochures.
- Usage has shifted from physical sources to digital/peer-based ones. For example, use of DOC brochures and Visitor Centres has dropped sharply.
- CamperMate app usage has also declined.
- The app environment and social media usage are fragmenting, making it more difficult to reach all visitors via a single channel.

#### **Trust in Information Sources**

- The DOC website remains the most used and trusted information source.
- The MSC website / online videos, DOC Brochures and Visitor Centres are highly trusted but less often used.
- Social media ranks among the most used, yet least trusted.
- **Use does not equal trust.** Many hikers act on sources they do not rate highly, especially younger and more impulsive hikers.

#### Influence on Risk Decisions

- Those using trusted official sources (e.g. DOC, MSC) were better prepared and had more realistic expectations of challenge.
- Those using casual or social sources tended to overestimate the challenge and be under-prepared.



# **KEY FINDINGS (CONT.)**

#### **Implications**

The following suggestions are provided to support future initiatives by the LSF and its members to improve safety and reduce the number of search and rescue incidents.

#### **Communication Strategy**

- Tailor safety messaging to different personas refer to the following section.
   For example, visual cues for Naïve Learners and advanced alerts for Risk-Tolerant Experts.
- Embed DOC credibility into social and peer-led content, especially for more impulsive or less-experienced hikers.
- Use gamified or check-in tools at key decision points (e.g., "are you really ready?" prompts on mobile apps or Google Maps).

#### **Safety Messaging and Trust**

- Increase early-stage engagement during planning (e.g., booking confirmations, itinerary tools).
- Clarify and update track risk ratings explore a more universal, visible grading system.
- Reinforce the limits of peer-based and social media guidance promote DOC and MSC as "always current, always trusted."

#### **Policy and Practice**

- Support safety culture through:
  - Standardised track difficulty symbols.
  - Real-time trail and weather updates.
  - Shared stories of near-misses to encourage behavioural reflection.

- Continue multi-channel education campaigns, especially for new or younger audiences.
- Maintain focus on post-hike reflection tools to reinforce learnings and improve future decision-making.

#### Possible Drivers of Change 2020 → 2025

The research findings suggest the following as drivers of change in visitor risk perceptions and behaviour:

- Increased exposure to digital tools and greater familiarity with New Zealand tracks may have lowered perceived risk.
- COVID-19 may have lowered trust and increased self-reliance, particularly among New Zealand hikers.
- Social norms around adventure, risk-taking, and peer influence appear strong, especially among young or impulsive groups.
- Greater information availability may have led to overconfidence, particularly if not an 'official' or trusted source and not grounded in reality (evidence expertise).

angus & associates

## **PERSONAS**

Using data relating to hikers' demographic characteristics, trip characteristics, previous experience and risk profile, five distinct hiker segments have been identified in this research.

- Informed Expert Solo, advanced, experienced, use and trust DOC and other information sources (MSC, i-site, Metservice, people who did the hike and Facebook), seek moderate challenge (31% of the sample)
- Risk-Tolerant Expert Confident, minimalist planner, avoids crowds, embraces challenge and risk (20% of the sample)
- Naive Learner Intermediate, older/younger, under-prepared, uses casual information sources (21% of the sample)
- Impulsive Novice Young, spontaneous, under-prepared, uses social media heavily (17% of the sample)
- Risk-Averse Planner Young, international, cautious, over-prepares, values social proof and official information (12% of the sample)
- The following approaches to risk messaging and communication for each segment are recommended for future consideration.



#### **Informed Expert**

- This group is not complacent but self-reliant. Potential to position DOC information as a useful complement to their expertise, not a substitute.
- Encourage reporting back or contributing to safety information, e.g., via track condition updates or testimonials.
- Focus messages on emergency back-up (e.g. PLBs, safety alerts, contactability), since this group often hikes alone.
- They can be used as peer influencers or validators of official advice to influence less experienced hikers.



#### **Risk-Tolerant Expert**

- This group is the hardest to reach they are confident and less inclined to engage with safety information.
- · Instead of trying to warn them, position DOC safety communications as advanced tools or situational briefings e.g. track-specific risk alerts, avalanche warnings, gear innovations.
- Highlight mutual responsibility and how their behaviour affects others, such as less experienced companions.
- This group might value data-driven risk assessments or technical briefings over general safety advice.



#### Naïve Learner

- · This group is at high risk of misunderstanding actual safety requirements.
- Use plain language, visual cues (e.g., icons or short videos), and checklist-style guidance to make key information clear and memorable.
- Meet them where they are integrate official safety messages into platforms they use (Instagram, TikTok, YouTube).
- Prompt them earlier in the planning journey (e.g., during booking or itinerary stages) with "are you really ready?" style nudges.
- Emphasise how to ask for help, e.g., what DOC staff can do, what to do if lost, when to turn back.





# PERSONAS (CONT.)



#### **Impulsive Novice**

- This group needs rapid, accessible, attentiongrabbing safety prompts - at carparks, trailheads, and on social platforms.
- Use short-form content (reels, TikToks, stories) that quickly communicate key hazards and what to do.
- Highlight real consequences of unpreparedness (e.g., rescues, lost hikers) in relatable, peer-led ways.
- Consider gamified or interactive checklists ("Can you hike it?") to raise engagement before they set out.
- Place last-minute safety nudges (via Google Maps, CamperMate, i-SITE displays) at critical decision points.



#### **Risk-Averse Planner**

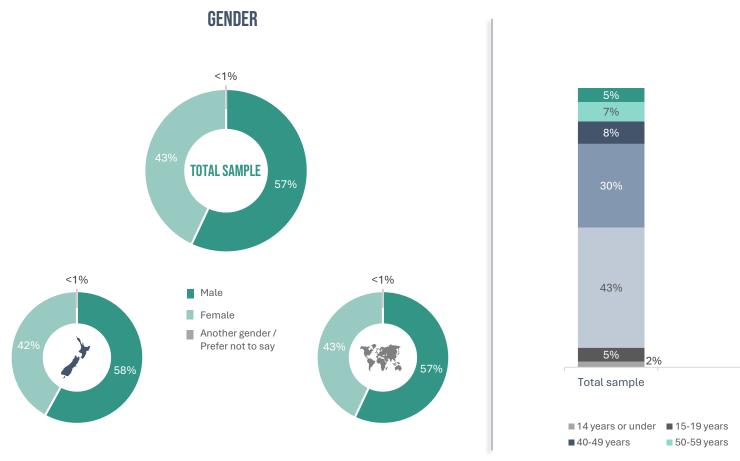
- These visitors are highly receptive to safety information, especially from DOC and tourism operators. Capitalise on this by reinforcing key safety messages through multiple trusted touchpoints.
- They value detailed planning resources maps, alerts, gear lists, and hazard information should be prominent and easy to access early in the trip planning cycle.
- Social media is influential for this group pair credible DOC messaging with user-generated content (e.g. influencers or peer stories) to reinforce responsible behaviours.
- As they already expect some difficulty, messages can affirm smart choices and subtly address over-cautiousness (e.g., confidence-building content).

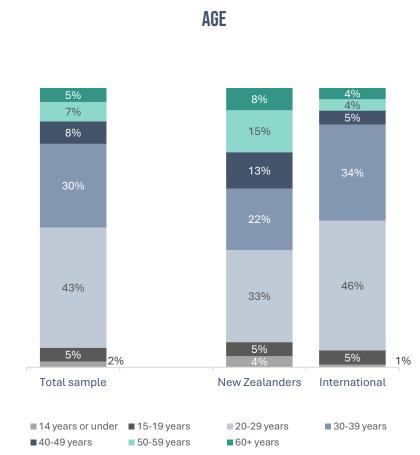




# **GENDER & AGE – SURVEY RESPONDENTS**

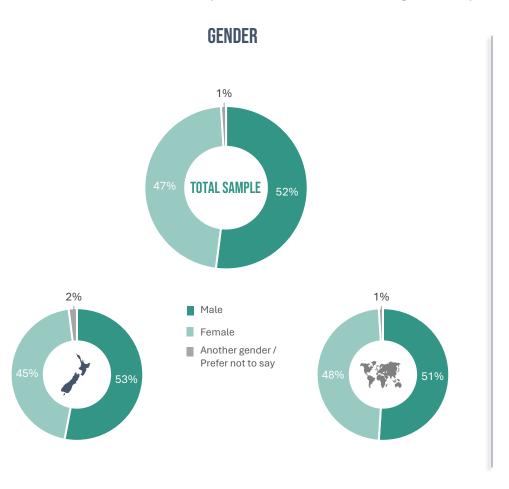
- Male survey respondents outnumbered females across the total sample, including both New Zealand and international respondents.
- Most respondents (73%) were aged between 20 and 39 years. Compared to international respondents, a greater proportion of New Zealanders were aged 40 years and older; 36% compared with 13% of international respondents.

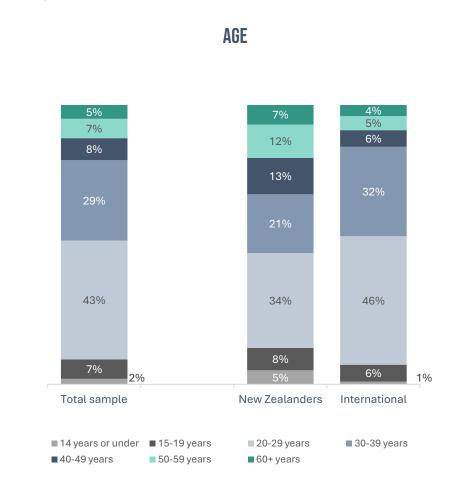




# **GENDER & AGE - ALL HIKERS**

- The gender split amongst all hikers was relatively balanced, with 52% male and 47% female.
- Three in five hikers were aged between 20 and 39.
- New Zealanders were more likely than international hikers to be aged over 40 years; 32% compared with 15%.





# **NATIONALITY & COUNTRY OF RESIDENCE**

- Three-quarters of survey respondents and all hikers for which demographic data was captured were international visitors.
- International survey respondents (and all hikers) most often originated from Germany, the UK, the USA, France, and Australia.

	Resi	oondents	All H	likers
	Nationality	Country of Residence	Nationality	Country of Residence
New Zealand	24%	35%	25%	37%
International	76%	65%	75%	63%
Germany	12%	11%	11%	10%
UK	10%	8%	10%	8%
USA	8%	8%	8%	7%
France	8%	7%	8%	7%
Australia	6%	6%	6%	6%
Netherlands	4%	3%	4%	3%
Canada	4%	3%	3%	3%
Israel	3%	3%	3%	3%
China	2%	1%	2%	1%
Czech Republic	2%	2%	2%	1%
Other European	13%	11%	12%	10%
Other Asia	3%	1%	4%	1%
Other	1%	1%	3%	3%
Total	n:	=1,623	n=3	,181





### **GROUP SIZE**

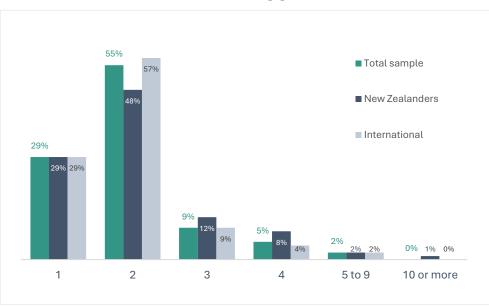
More than half of hikers (\*) were tramping in pairs, while nearly three in ten were hiking alone (solo). Solo hiking rates were similar for both New Zealand and international visitors, however: -

- International hikers were more likely to be in two-person groups.
- New Zealanders were more likely to hike in groups of three or four.
- Groups of 5 or more hikers were rare (3% overall).

#### Track patterns by group type:

- Solo hikers were common on the Avalanche Peak Track, Mt Taranaki Summit Climb, and Angelus Hut & Routes, but were less likely to be found on the Gertrude Saddle or Brewster Tracks.
- Couples were prominent on the Gertrude Saddle Track, and less likely to hike the Mt Taranaki Summit Climb or the Ōmanawanui Track.
- Larger groups (4+) were more likely to be found on the Ōmanawanui Track.

### **GROUP SIZE [1]**



Group size	Total sample	Tongariro Alpine Crossing	Avalanche Peak Track	Mt Taranaki Summit Climb	Ōmanawanui Track	Mueller Hut Route	Gertrude Saddle Track	Angelus Hut & Routes	Brewster Track
1	29%	25%	38%	35%	27%	27%	15%	39%	21%
2	55%	60%	52%	43%	45%	62%	71%	49%	62%
3	9%	10%	7%	16%	10%	6%	8%	9%	9%
4	5%	4%	2%	5%	13%	3%	5%	2%	5%
5 to 9	2%	1%	1%	1%	4%	2%	2%	1%	3%
10 or more	0%	0%	0%	0%	1%	0%	0%	0%	0%
Sample size	1,623	336	251	230	203	161	160	148	134

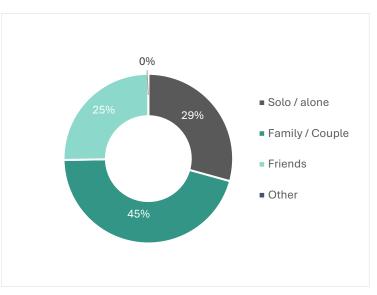
# **GROUP TYPE AND TRACK PREFERENCES**

The largest proportion of hikers (45%) were hiking as a family or couple, followed by solo hikers (29%), then groups of friends (25%). There were no significant differences in group type between New Zealanders and international hikers.

#### Track preferences by group type:

- Solo hikers were more likely to be found on the Avalanche Peak Track, Mt Taranaki Summit Climb, and the Angelus Hut & Routes, and less likely to be on the Gertrude Saddle and Brewster Tracks.
- Families / couples were the majority of hikers on the Gertrude Saddle Track, Tongariro Alpine
  Crossing and Mueller Hut Routes, and were less likely to be using the Avalanche Peak Track,
  Mt Taranaki Summit Climb, or the Ōmanawanui Track.
- Friend groups were most commonly seen on the Ōmanawanui and Brewster Tracks.
- The Ōmanawanui Track was more popular with larger groups (four or more).

### **GROUP TYPE [1]**



Group type	Total sample	Tongariro Alpine Crossing	Avalanche Peak Track	Mt Taranaki Summit Climb	Ōmanawanui Track	Mueller Hut Route	Gertrude Saddle Track	Angelus Hut & Routes	Brewster Track
Solo / alone	29%	25%	38%	35%	27%	27%	15%	39%	21%
Family / Couple	45%	52%	39%	39%	38%	52%	62%	35%	45%
Friends	25%	22%	23%	26%	33%	20%	23%	25%	34%
Other	0%	0%	0%	0%	1%	1%	0%	1%	1%
Sample size	1,623	336	251	230	203	161	160	148	134



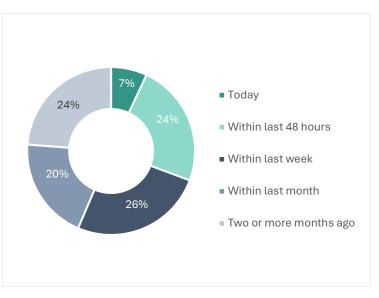
# **DECISION MAKING HORIZON**

There was no clear 'preference' in relation to decision-making. A small proportion (7%) of hikers had made their decision on the day of their hike. The remainder had decided within the last 48 hours (24%), week (26%), month (20%) or two months in advance (24%). Solo hikers tended to plan their hikes further in advance than did families and couples.

#### Differences by track:

- Ōmanawanui Track hikers were less likely to have decided a month or more in advance.
- Tongariro Alpine Crossing hikers were more likely to have decided a month or more in advance, and less likely within 1–7 days prior.
- · Avalanche Peak Track hikers were less likely to have decided two or more months ago.
- Gertrude Saddle Track hikers were less likely to have decided within the last month.
- Angelus Hut & Routes hikers were less likely to make a same-day decision.
- Mount Taranaki Summit Climb hikers were less likely to make a same day or within 48-hour decision.

### **DECISION HORIZON [1]**



					Tra	ack				Group type			
	Total sample	Tongariro Alpine Crossing	Avalanche Peak Track	Mt Taranaki Summit Climb	Omanawa- nui Track	Mueller Hut Route	Gertrude Saddle Track	Angelus Hut & Routes	Brewster Track	Solo / alone	Family / Couple	Friends	Other
Today	7%	1%	6%	3%	22%	9%	9%	1%	7%	9%	6%	6%	0%
Within last 48 hours	24%	11%	39%	18%	32%	27%	28%	18%	20%	28%	20%	26%	33%
Within last week	26%	15%	27%	33%	31%	20%	33%	28%	27%	26%	23%	31%	50%
Within last month	20%	26%	18%	23%	9%	19%	12%	28%	19%	19%	20%	19%	17%
Two or more months ago	24%	47%	9%	22%	6%	25%	19%	25%	26%	18%	31%	17%	0%
Sample size	1,623	336	251	230	203	161	160	148	134	470	734	413	6



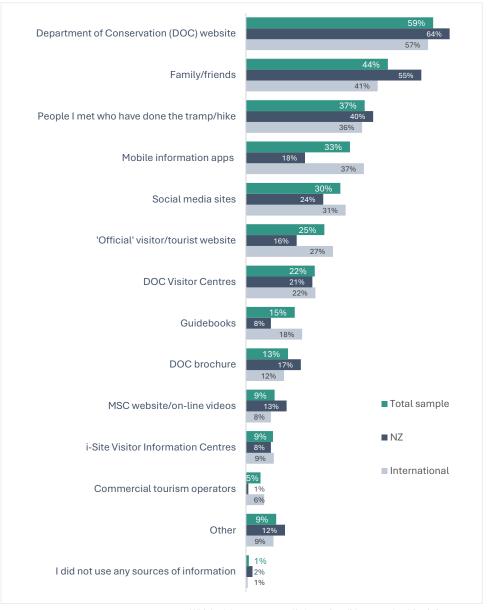


## INFORMATION SOURCE USED FOR THIS TRIP

- Both New Zealand and international hikers used an average of three different information sources when planning their hike.
- The top two sources for both groups were the DOC website and family or friends.
- For New Zealanders, the next most common sources were people they met who had done the hike and social media sites.
- For international hikers, the third and fourth most-used sources were mobile information apps and people they met who had done the hike.
- International hikers were more likely to use visitor and tourism websites, guidebooks and commercial tourism operators. They were less likely to use DOC brochures or the MSC websites / online videos.
- DOC Visitor Centres were used by one in five hikers (both New Zealand residents and international visitors).
- 22 (out of 203) or 11% of Omanawanui hikes had visited the Arataki Visitor Centre before their hike.



### **INFORMATION SOURCE USED [1]**





# INFORMATION SOURCE USED FOR THIS TRIP – 2020 COMPARED WITH 2025

#### **Main Changes:**

- · Shift away from physical and staffed sources (DOC brochures and Visitor Centres) toward digital and peer-based sources.
- · New Zealanders reduced their use of DOC official channels more than international visitors.
- International hikers have increasingly embraced official digital tourism sites and DOC websites.
- Social media remains a key information source across both groups.

	Total S	Sample	N	Z	International	
Information source	2020	2025	2020	2025	2020	2025
DOC website	56%	59%	72%	64%	51%	57%
Family/friends	45%	44%	64%	55%	39%	41%
People I met who have done the tramp/hike	36%	37%	42%	40%	35%	36%
Mobile information apps	37%	33%	26%	18%	40%	37%
Social media sites	28%	30%	20%	24%	30%	31%
'Official' visitor/tourist website	9%	25%	6%	16%	10%	27%
DOC Visitor Centres	38%	22%	36%	21%	38%	22%
Guidebooks	19%	15%	11%	8%	21%	18%
DOC brochure	27%	13%	30%	17%	26%	12%
MSC website/online videos	7%	9%	10%	13%	6%	8%
i-Site Visitor Information Centres	18%	9%	10%	8%	20%	9%
Commercial tourism operators	4%	5%	3%	1%	5%	6%
Sample size	720	1,623	157	384	563	1239



# **INFORMATION SOURCES BY TRACK**

- The information sources that hikers used varied by track.
- Hikers walking the Tongariro Alpine Crossing and Mt Taranaki Summit Climb tracks were more likely to have drawn on multiple sources of information than those on other tracks. In addition to the commonly used sources (DOC website, family/friends, social media, etc.), they were more likely to use official visitor or tourism websites, guidebooks, the MSC website / online videos and Local i-SITE visitor centres.
- In contrast, hikers using the Ōmanawanui Track were the most likely not to have used any sources of information or to have used family/friends as the main source.

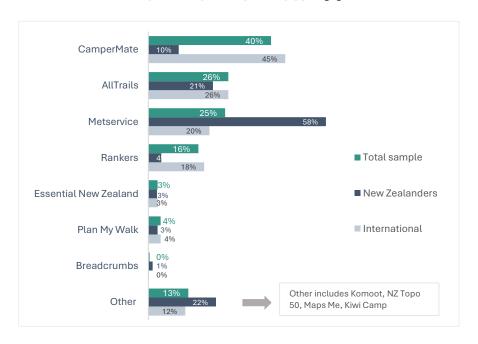
Source	Total sample	Tongariro Alpine Crossing	Avalanche Peak Track	Mt Taranaki Summit Climb	Ōmanawanui Track	Mueller Hut Route	Gertrude Saddle Track	Angelus Hut & Routes	Brewster Track
Department of Conservation (DOC) website	59%	73%	60%	67%	33%	54%	44%	66%	60%
Family/friends	44%	56%	35%	47%	54%	33%	39%	40%	42%
People I met who have done the tramp/hike	37%	45%	30%	42%	32%	30%	34%	37%	43%
Mobile information apps	33%	39%	27%	41%	30%	31%	34%	23%	28%
Social media sites	30%	44%	20%	28%	33%	24%	23%	23%	31%
'Official' visitor/tourist website	25%	52%	17%	33%	11%	7%	15%	14%	20%
DOC Visitor Centres	22%	15%	24%	30%	6%	30%	15%	38%	21%
Guidebooks	15%	24%	17%	17%	4%	14%	18%	10%	7%
DOC brochure	13%	8%	14%	19%	2%	16%	16%	25%	12%
MSC (New Zealand Mountain Safety Council) website/online videos	9%	13%	4%	13%	2%	7%	9%	11%	10%
i-Site Visitor Information Centres	9%	11%	8%	16%	4%	7%	4%	8%	4%
Commercial tourism operators	5%	16%	1%	4%	0%	2%	2%	0%	1%
I did not use any sources of information	1%	0%	0%	2%	3%	0%	2%	1%	0%
Other	9%	4%	9%	11%	7%	17%	15%	9%	12%
Sample size	1,623	336	251	230	203	161	160	148	134



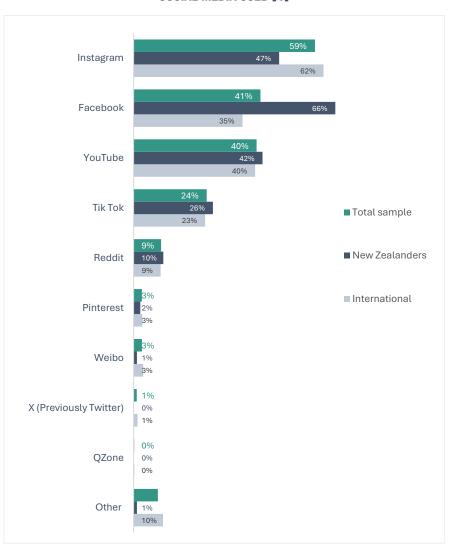
# **SOCIAL MEDIA & MOBILE APPS USED**

- Instagram was the most commonly-used social media platform, followed by Facebook, YouTube, and TikTok.
- Instagram was more popular amongst international hikers, while Facebook was more commonly used by New Zealanders.
- There was little difference in use of YouTube and TikTok between the two groups.
- Amongst mobile apps, CamperMate was the most frequently used, and more so by international hikers.
- MetService was used more often by New Zealanders than by international hikers.

### **MOBILE INFORMATION APPS USED [1]**



### SOCIAL MEDIA USED [1]





# **MOBILE INFORMATION APPS USED - 2020 COMPARED WITH 2025**

#### **Main Changes:**

- Shift away from dominant single apps (e.g., CamperMate, MetService) toward a wider range of digital tools.
- New Zealanders use an increasingly diverse range of apps but still lean heavily on MetService.
- International hikers still favour CamperMate but are rapidly adopting other tools.
- The app environment is fragmenting, meaning safety and planning content may need to be syndicated across multiple platforms.

	Total Sample		N	ΙZ	International	
Mobile apps	2020	2025	2020	2025	2020	2025
CamperMate	64%	40%	19%	10%	73%	45%
Rankers	14%	16%	6%	4%	15%	18%
Essential New Zealand	2%	3%	1%	3%	2%	3%
Breadcrumbs	0%	0%	1%	1%	0%	0%
Metservice	36%	25%	80%	58%	27%	20%
AllTrails	4%	N/A	0%	N/A	4%	N/A
Wiki camps	5%	N/A	1%	N/A	6%	N/A
Other	0%	51%	0%	58%	0%	50%
Sample size	411	529	69	71	342	458



# **SOCIAL MEDIA USED - 2020 COMPARED WITH 2025**

#### **Main Changes:**

- Instagram is now the top social media platform across all groups.
- Facebook use has remained steady in NZ but declined significantly amongst international visitors.
- Short-form video platforms like TikTok are emerging as key channels for younger or less experienced segments.
- Platform diversity has increased, making it harder to rely on a single channel for safety communications.
- · Reddit's growth may point to more hikers engaging with community-driven, unmoderated advice sources.

(NB: While Reddit is unmoderated, it also utilises a voting system for comments. Comments with more upvotes are displayed first while comments with significant number of downvotes are automatically hidden.)

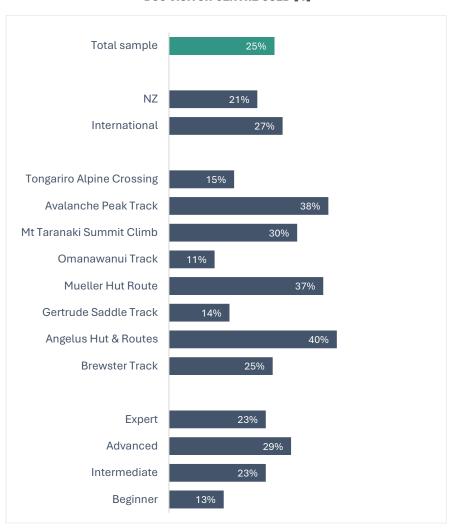
	Total S	ample	N	IZ	Intern	ational
Social media	2020	2025	2020	2025	2020	2025
Facebook	65%	41%	65%	66%	65%	35%
YouTube	32%	40%	35%	42%	32%	40%
Instagram	46%	59%	40%	47%	47%	62%
QZone	0%	0%	0%	0%	0%	0%
Weibo	0%	3%	0%	1%	0%	3%
X (Previously Twitter)	2%	1%	0%	0%	2%	1%
Reddit	1%	9%	2%	10%	1%	9%
Pinterest	5%	3%	2%	2%	6%	3%
TikTok	3%	24%	N/A	26%	N/A	23%
Blog	3%	N/A	0%	N/A	4%	N/A
Other (please specify)	0%	8%	0%	1%		10%
Sample size	293	480	52	93	241	387



# **DOC VISITOR CENTRE USE**

- One in four hikers visited or contacted a DOC visitor centre before their trip, with international hikers more likely to do so than New Zealanders.
- Hikers on the Angelus Hut & Routes, Avalanche Peak Track, Mueller Valley Track, Mt Taranaki Summit Climb, and Brewster Track were more likely to have visited a DOC visitor centre. Between 25% and 40% of hikers had done so.
- Hikers on the Tongariro Crossing and Gertrude Saddle Track were less likely to have visited a DOC visitor centre. Between 14%-15% had done so.
- Advanced hikers were more likely to visit or contact a DOC visitor centre compared to those with lower skill levels.
- The Ōmanawanui Track is not a DOC site and is not part of the DOC Visitor Centre knowledge base. However, 11% of hikers using that track claimed to have visited the Arataki Visitor Centre before their hike.

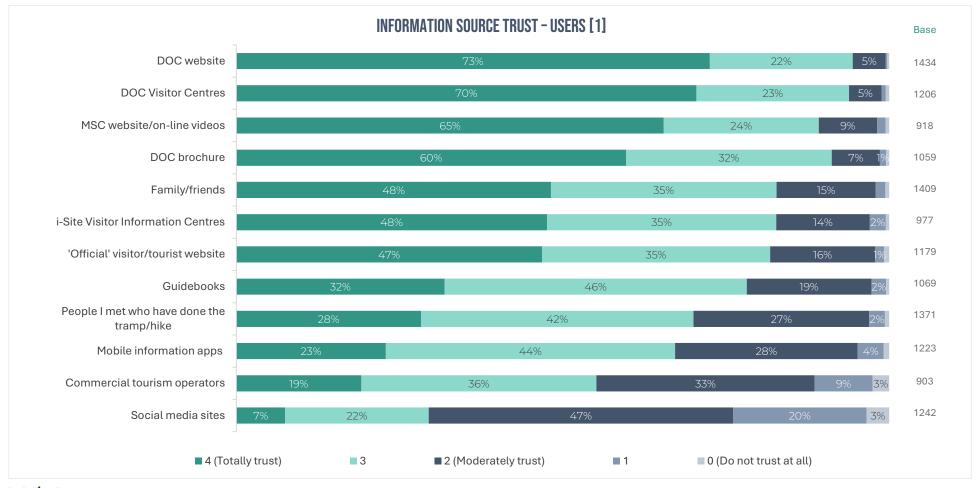
### **DOC VISITOR CENTRE USED [1]**





# MOST TRUSTED INFORMATION SOURCES (BY USERS OF THAT SOURCE)

- The four most trusted information sources were the DOC website, DOC Visitor Centres, MSC website / online videos and DOC brochures, which were totally trusted by 60-73% of hikers. Family/friends, i-Site Visitor Information Centres and' Official' visitor/tourist websites were totally trusted by 47-48% of hikers.
- Generally, there is a strong link between trust and usage the more trusted a source, the more likely it is to be used. Exceptions include social media sites and 'people who have done the hike'. These sources were widely used, but less frequently rated as highly trustworthy.





# **MOST TRUSTED INFORMATION SOURCES - 2020 COMPARED WITH 2025**

#### Main Changes:

- Official and formal information sources (e.g., DOC, MSC, i-Site Visitor Information Centres, 'Official' Visitor/tourism websites, Mobile Information Apps and Commercial Tourism Operators) have consolidated or increased in trust.
- · Word-of-mouth sources (family/friends, people met while hiking) remain stable or show minimal change.
- Social media is the only source to decline in trust, despite high usage.

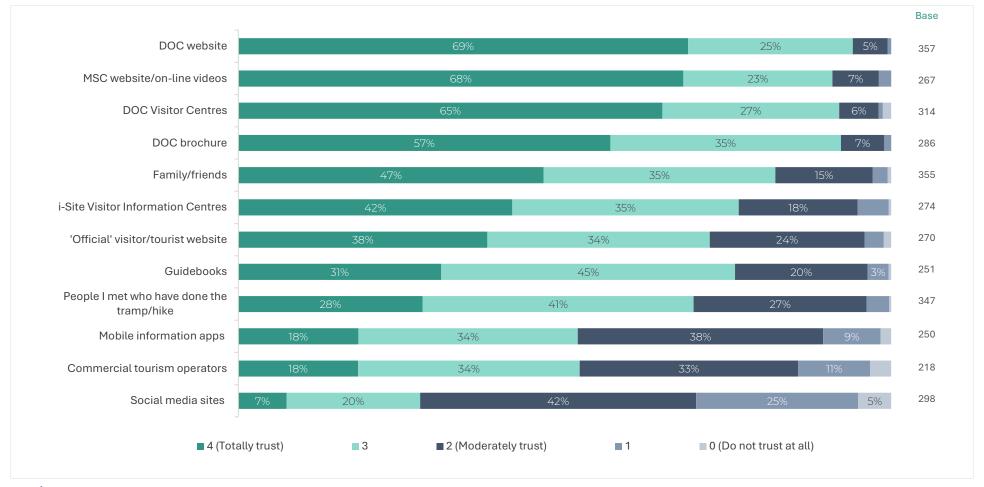
Source	2020	2025	Difference
DOC website	92%	94%	+2%
DOC Visitor Centres	90%	94%	+4%
DOC brochure	86%	91%	+5%
MSC website/online videos	82%	89%	+7%
Family/friends	83%	83%	0%
i-Site Visitor Information Centres	80%	83%	+3%
'Official' visitor/tourist website	68%	82%	+14%
Guidebooks	70%	78%	+8%
People I met who have done the tramp/hike	69%	70%	+1%
Mobile information apps	55%	67%	+12%
Commercial tourism operators	44%	55%	+11%
Social media sites	33%	29%	-4%



# TRUSTED INFORMATION SOURCES – NEW ZEALAND HIKERS

- The most trusted information sources for New Zealand hikers are consistent with the overall sample: DOC website, MSC website/online videos, DOC Visitor Centres and DOC Brochures, which were totally trusted by between 57% and 69% of hikers.
- Family/friends, i-Site Visitor Information Centres and' Official' visitor/tourist websites are totally trusted by between 38%-47% of hikers.

### INFORMATION SOURCE TRUST - NZ [1]

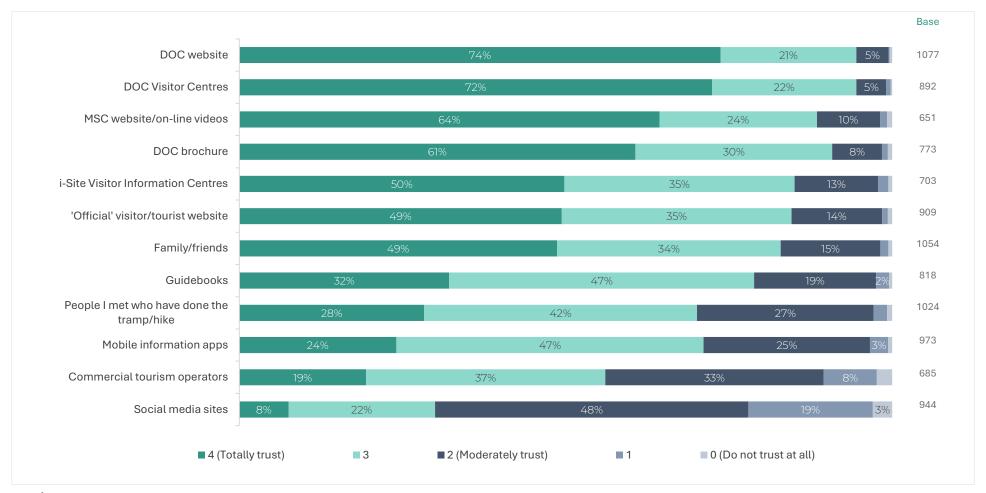




# TRUSTED INFORMATION SOURCES – INTERNATIONAL HIKERS

- International hikers share the same top four trusted sources as the overall sample: DOC website, DOC Visitor Centres, MSC website/online videos and DOC brochures, which are totally trusted by between 61%-74% of hikers.
- i-Site Visitor Information Centres, 'Official' visitor /tourist websites and family/ friends are totally trusted by 49/50% of hikers.

### INFORMATION SOURCE TRUST - INTERNATIONAL [1]



# **INFORMATION SOURCES - USE VERSUS TRUST**

- The DOC website is both the most used and most trusted information source across the total sample, including both New Zealand and international hikers. The MSC website/online videos rank 9<sup>th</sup> for usage but is the 4<sup>th</sup> most trusted source.
- DOC Visitor Centres and Brochures most rank higher for trust than use; 4th and 6th for Use and 2nd and 3rd for Trust, respectively.
- Family and friends, along with people who have previously done the tramp, rank second and third in terms of usage across all groups. However, the level of trust in these sources is lower than their usage ranking; 5th for family/friends and 9th for people who have done the tramp/hike.
- Social media ranks in the top five for the total sample and international hikers, and top four for New Zealanders but is the least trusted source across the board.

Source	Total s	sample	New Ze	alanders	International		
	Use	Trust	Use	Trust	Use	Trust	
DOC website	1	1	1	1	1	1	
Family/friends	2	5	2	5	2	7	
People I met who have done the tramp/hike	3	9	3	9	3	10	
DOC Visitor Centres	4	2	6	3	7	2	
Social media sites	5	12	4	12	5	12	
DOC brochure	6	3	9	2	9	3	
i-Site Visitor Information Centres	7	6	10	6	10	5	
'Official' visitor/tourist website	8	7	7	8	6	6	
MSC website/online videos	9	4	11	4	12	4	
Guidebooks	10	8	8	7	8	8	
Mobile information apps	11	10	5	11	4	9	
Commercial tourism operators	12	11	12	10	11	11	
Sample size	1,6	523	3	84	1,239		

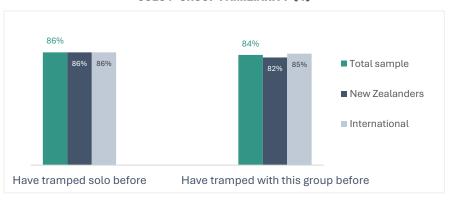




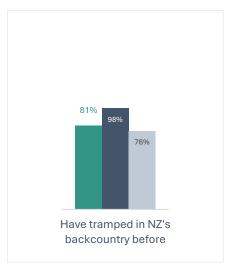
# PREVIOUS EXPERIENCE & FAMILIARITY WITH TRACK

- Most survey respondents had hiked before, either solo or with their current group, and there was no significant difference between New Zealand and international hikers.
- A large majority had previous experience in New Zealand's backcountry, though this was much more common amongst New Zealand hikers.
- Only 17% had previously visited the track they were hiking that day again, prior experience was more common amongst New Zealand trampers.
- Of those who had previously hiked the subject track, more than half had visited within the past year, and a further 27% within the past five years.

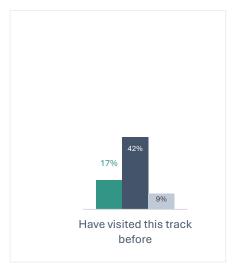
### SOLO / GROUP FAMILIARITY (1)



### **BACKCOUNTRY FAMILIARITY (2)**



### TRACK FAMILIARITY (3)



### LAST VISIT TO TRACK (4)



 $1-Have\ you\ ever\ tramped/hiked\ alone\ /\ with\ some\ or\ all\ of\ these\ companions\ before\ this\ trip?$ 

2- Have you tramped/hiked in New Zealand's *backcountry* before this trip?

3 - Have you visited this *track* before ...?

4 - If so, when was your last visit to ...?



# **SKILL LEVEL AND TRACK PREFERENCES**

The largest proportion of hikers in the survey self-identified as having an advanced, expert or professional skill level (58%), followed by intermediate, and beginner skill levels. There were no significant differences between NZ and international hikers.

- Beginners were prominent amongst hikers on the Tongariro Alpine Crossing or Ōmanawanui Track.
- Intermediates also favoured the Tongariro Alpine Crossing.
- Advanced or experts were prominent amongst hikers on the Avalanche Peak Track and Angelus Hut & Routes.
- Amongst advanced hikers, the Mueller Hut Route and Brewster Track were most popular.

#### **Hiking frequency:**

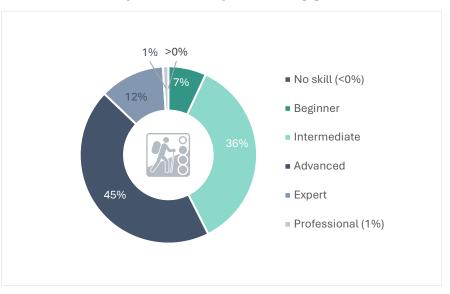
- Two-thirds of hikers had hiked more than five times in the past year, including 69% of International visitors and 55% of New Zealand hikers.
- New Zealanders were more likely than International visitors to have tramped 1-4 times in the last year (38% compared with 24%).

	Tongariro Alpine Crossing	Avalanche Peak Track	Mt Taranaki Summit Climb	Omanawa -nui Track		Gertrude Saddle Track	Angelus Hut & Routes	Brewster Track
No skill	0%	0%	0%	2%	0%	0%	0%	0%
Beginner	11%	1%	6%	23%	3%	1%	1%	3%
Intermediate	52%	25%	40%	41%	27%	27%	23%	31%
Advanced	32%	55%	44%	27%	57%	48%	55%	54%
Expert	4%	16%	10%	6%	12%	23%	18%	12%
Professional	0%	2%	0%	1%	1%	2%	2%	1%
Sample size (n=)	336	251	230	203	161	160	148	134

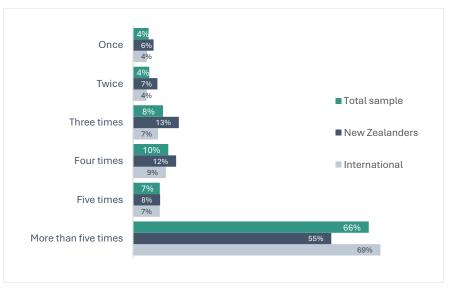
### angus & associates

#### % in Blue – Hiker Skill Level Significantly More Likely to Use % in Red – Hiker Skill Level Significantly Less Likely to Use

### (SELF-IDENTIFIED) SKILL LEVEL [1]



### HIKING FREQUENCY PAST 12 MONTHS [2]

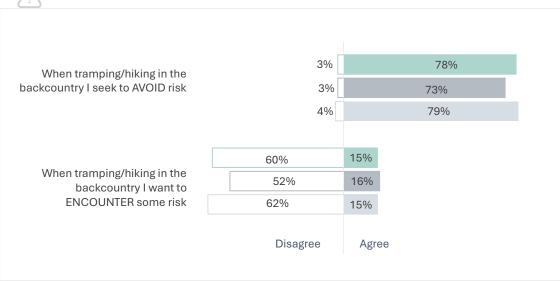


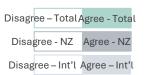
# **RISK PREFERENCE AND MISADVENTURE**

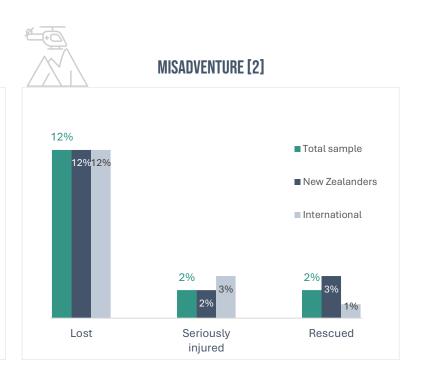
- Three-quarters of hikers said they try to avoid risk when hiking in the backcountry, while 15% said they actively seek some level of risk.
- · New Zealanders appear to have a higher appetite for risk compared to international hikers.
- 12% of hikers reported getting lost while tramping.
- · Incidents involving serious injury or rescue were rare but had occurred.
- There were no significant differences in safety outcomes between NZ and international hikers.



### **RISK PREFERENCE [1]**



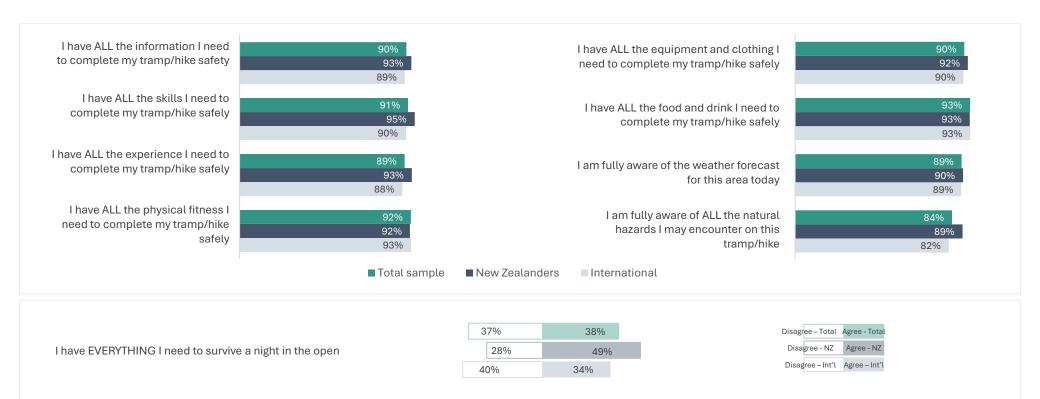






# PERCEIVED PREPAREDNESS PRE-HIKE

- Most hikers felt well-prepared for their hike, believing they had the information, skills, experience, physical fitness, equipment, and food/water needed to complete it. A similar proportion said they were fully aware of the weather forecast and any natural hazards they might encounter.
- · However, only one-third felt they had everything needed to survive a night in the open. This pattern was consistent across both New Zealand and international hikers.
- · Compared with international hikers, New Zealanders were more confident overall, with a higher proportion agreeing that:
  - They had all necessary skills, knowledge, and gear
  - They could survive an unplanned night in the open
  - They were aware of all potential natural hazards





# PREPAREDNESS BY TRACK AND EXPERIENCE LEVEL

- Hikers on the Tongariro Alpine Crossing and Ōmanawanui Track were less likely to feel well-prepared compared to those on more challenging routes like the Avalanche Peak Track, Mueller Hut Route, and Angelus Hut & Routes.
- · Advanced and expert hikers were generally better prepared than beginners and intermediate hikers.

	Total sample	Tracks							Skill				
		Tongariro Alpine Crossing	Avalanche Peak Track	Mt Taranaki Summit Climb	Omanawa- nui Track	Mueller Hut Route	Gertrude Saddle Track	Angelus Hut & Routes	Brewster Track	Beginner	Intermediate	Advanced	Expert
I have ALL the information I need to complete my tramp/hike safety	90%	88%	95%	91%	76%	96%	93%	99%	86%	73%	87%	94%	95%
I have ALL the skills I need to complete my tramp/hike safely	91%	86%	97%	91%	81%	96%	93%	99%	90%	55%	88%	98%	97%
I have ALL the experience I need to complete my tramp/hike safely	89%	83%	96%	87%	81%	93%	91%	96%	91%	56%	83%	96%	98%
I have ALL the physical fitness I need to complete my tramp/hike safely	92%	90%	97%	92%	83%	94%	94%	99%	93%	67%	88%	98%	99%
I have ALL the equipment and clothing I need to complete my tramp/hike safely	90%	86%	94%	90%	77%	96%	94%	98%	93%	67%	87%	95%	98%
I have ALL the food and drink I need to complete my tramp/hike safely	93%	93%	96%	95%	80%	96%	96%	99%	96%	81%	90%	98%	97%
I have EVERYTHING I need to survive a night in the open	38%	25%	39%	39%	25%	39%	28%	74%	56%	18%	32%	41%	53%
I am fully aware of the weather forecast for this area today	89%	84%	93%	92%	78%	91%	93%	93%	92%	80%	84%	92%	94%
I am fully aware of ALL the natural hazards I may encounter I may encounter on this tramp/hike	84%	75%	92%	88%	74%	88%	86%	92%	83%	63%	79%	89%	93%
Sample size (n=)	1,239	336	251	230	203	161	160	148	134	111	578	725	188

% in Blue – Significantly More Likely to Agree % in Red – Significantly Less Likely to Agree



# PREPAREDNESS - 2020 COMPARED WITH 2025

#### Main Changes:

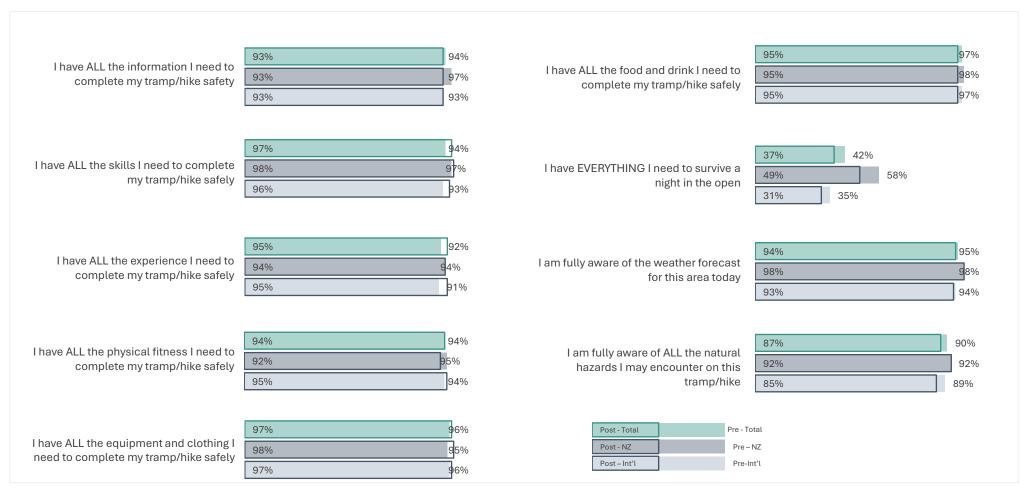
- Slight declines across nearly all aspects of preparedness, suggesting a growing realism or better awareness of personal limits, particularly around emergency readiness.
- · New Zealand hikers remain more confident overall, especially in survival and hazard awareness.
- Confidence in surviving a night outdoors is notably low and has dropped since 2020, reinforcing the need for better messaging on emergency planning.

	Total Sample		N	IZ	International	
	2020	2025	2020	2025	2020	2025
I have ALL the information I need to complete my tramp/hike safety	93%	90%	94%	93%	93%	89%
I have ALL the skills I need to complete my tramp/hike safely	95%	91%	93%	95%	95%	90%
I have ALL the experience I need to complete my tramp/hike safely	92%	89%	94%	93%	92%	88%
I have ALL the physical fitness I need to complete my tramp/hike safely	94%	92%	92%	92%	95%	93%
I have ALL the equipment and clothing I need to complete my tramp/hike safely	94%	90%	95%	92%	94%	90%
I have ALL the food and drink I need to complete my tramp/hike safely	96%	93%	97%	93%	95%	93%
I have EVERYTHING I need to survive a night in the open	41%	38%	53%	49%	38%	34%
I am fully aware of the weather forecast for this area today	90%	89%	93%	90%	89%	89%
I am fully aware of ALL the natural hazards I may encounter I may encounter on this tramp/hike	84%	84%	93%	89%	82%	82%
Sample size (n=)	720	1,623	157	384	563	1239



# PERCEIVED VS. ACTUAL PREPAREDNESS - PRE-HIKE VS POST-HIKE

- Agreement levels for all preparedness statements both before and after the hike were generally consistent across the total sample, as well as between New Zealand and international hikers.
- The only exception was the statement "I have EVERYTHING I need to survive a night in the open." Before the hike, more hikers agreed with this statement than after suggesting that some hikers had overestimated their level of preparedness.





# PERCEPTIONS OF LEVELS OF CHALLENGE - PRE-HIKE

- More than half of hikers rated their experience as 'moderately' challenging.
- · One in four described it as 'very' challenging, while 16% rated it as 'slightly' challenging.
- Differences by nationality: There was no difference between New Zealand and international hikers in the incidence with which they rated tracks as 'not at all' or 'slightly' challenging. However, New Zealanders were more likely to rate their hikes as 'moderately' challenging, and less likely to rate them as 'very' or 'extremely' challenging the opposite pattern was seen amongst international visitors.
- **Differences by track**: Tongariro Alpine Crossing and Mt Taranaki Summit Climb were more often rated as 'very' challenging. Avalanche Peak Track, Gertrude Saddle Track, and Angelus Hut & Routes were commonly rated 'moderately' challenging. Ōmanawanui Track was more likely to be rated 'not at all' or 'slightly' challenging.
- Differences by experience level: Beginner and intermediate hikers were more likely to rate their hikes as 'extremely' challenging. Advanced and expert hikers were less likely to do so, with expert hikers more likely to describe their hikes as 'slightly' challenging.



			Tracks							Skill			
	Total sample	Tongariro Alpine Crossing	Avalanche Peak Track	Mt Taranaki Summit Climb	Omanawa- nui Track	Mueller Hut Route	Gertrude Saddle Track	Angelus Hut & Routes	Brewster Track	Beginner	Intermediate	Advanced	Expert
Not at all	2%	2%	1%	1%	6%	1%	5%	2%	1%	2%	1%	2%	4%
Slightly	16%	24%	10%	8%	30%	9%	9%	21%	14%	20%	12%	16%	27%
Moderately	53%	29%	62%	51%	58%	58%	64%	66%	54%	40%	50%	56%	54%
Very	25%	34%	26%	36%	7%	32%	21%	11%	27%	31%	31%	23%	15%
Extremely	4%	12%	1%	4%	0%	1%	1%	0%	3%	8%	6%	2%	0%
Sample size (n=)	1,239	336	251	230	203	161	160	148	134	111	578	725	188

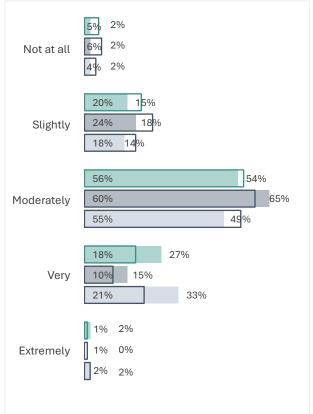
% in Blue – Significantly More Likely to Agree % in Red – Significantly Less Likely to Agree

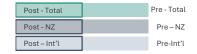


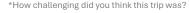
# PERCEIVED VS. ACTUAL LEVELS OF CHALLENGE - POST-HIKE

- The respondents who completed the post-hike survey had also completed the pre-hike survey, allowing for a direct comparison of perceived versus actual challenge.
- Overall, hikers tended to <u>overestimate</u> the difficulty of their hikes. Post-hike ratings showed a higher proportion selecting 'not at all' or 'slightly' challenging. Fewer hikers rated their hike as 'very' challenging post-hike compared to pre-hike. This pattern was consistent across the total sample, New Zealanders, and international hikers.
- 'Moderately challenging' was the most common rating. New Zealanders were more likely than international hikers to choose this rating and tended to overrate the degree of challenge (65% choosing this pre-visit vs. 60% post-experience). International hikers were more likely to underrate the degree of challenge (49% choosing 'moderately challenging' pre-experience vs. 55% post).
- Track-specific difficulty ratings. More likely to be rated 'very challenging' were the Tongariro Alpine
  Crossing, and Mt Taranaki Summit Climb. More likely to be rated 'moderately challenging' were the Avalanche
  Peak Track, Gertrude Saddle Track, Angelus Hut & Routes. More likely to be rated 'not at all' or 'slightly
  challenging' was the Ōmanawanui Track.
- Perceived challenge accuracy: Over-rated tracks (felt easier than expected) were the Tongariro Alpine Crossing, Avalanche Peak Track, Mueller Hut Route, Gertrude Saddle Track, Angelus Hut & Routes and Brewster Track. The only under-rated track (felt harder than expected) was the Mt Taranaki Summit Climb.

	Tongariro Alpine Crossing		O		8			ranaki t Climb			Mueller Hut Route		Gertrude Saddle Track		Angelus Hut & Routes		Brewster Track	
	Pre	Post	Pre	Post	Pre	Post	Pre	Post	Pre	Post	Pre	Post	Pre	Post	Pre	Post		
Not at all	0%	0%	1%	4%	0%	2%	4%	7%	3%	1%	4%	13%	0%	0%	2%	6%		
Slightly	33%	13%	7%	22%	9%	5%	33%	27%	12%	13%	12%	21%	22%	38%	18%	22%		
Moderately	13%	67%	61%	63%	56%	44%	51%	62%	47%	56%	63%	54%	67%	58%	44%	50%		
Very	50%	21%	30%	11%	33%	46%	11%	2%	37%	28%	20%	9%	11%	4%	30%	22%		
Extremely	4%	0%	1%	1%	2%	4%	0%	2%	1%	1%	1%	3%	0%	0%	6%	0%		
Sample size (n=)	33	36	2	51	23	30	20	03	10	61	16	60	14	48	1;	34		





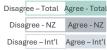


# PERCEPTIONS OF SAFETY AND EMERGENCY PREPAREDNESS - PRE-HIKE

- **Companions vs. organisations** Overall, hikers are more likely to trust their companions (40%) over safety or official organisations (28%) to keep them safe on hikes. However, international hikers are more likely than New Zealanders to rely on safety / other organisations.
- Confidence in emergency support More than half of hikers believe they could contact emergency services at any time and place. Three in five trust that someone would raise the alarm if they failed to return. New Zealanders show higher levels of confidence in both areas than do international hikers.
- Perceptions of safety messages One in four hikers think safety signs are aimed at less capable hikers, and there is no difference between New Zealand and international hikers in this respect. A similar proportion feel that the messages exaggerate risks. However New Zealanders are more cautious, with fewer agreeing with this sentiment than international hikers (17% vs. 29%).
- Trail crowds and perceived safety More than two-thirds of hikers feel safer when others are on the track. However, only 30% believe popular tracks are always the safest. International hikers are more likely to agree with both views than New Zealanders.







# PERCEPTIONS OF SAFETY SUPPORT BY TRACK AND SKILL LEVEL - PRE-HIKE

#### By track:

- Tongariro Alpine Crossing Hikers are more likely to rely on companions or safety organisations to keep them safe, believe someone would alert emergency services if they didn't return as planned, and are less likely to believe safety signs exaggerate risks.
- Angelus Hut & Routes Hikers are less likely to rely on companions for safety.
- Ömanawanui Track and Gertrude Saddle Track Hikers are less confident that someone would raise the alarm if they failed to return.

#### By skill level:

- Beginner hikers are more likely to rely on companions or safety organisations for safety and believe popular trails are always the safest.
- Intermediate hikers feel safer when there are others on the trail.
- Expert hikers are less likely to rely on others (companions and safety/other organisations), less likely to believe popular trails are inherently safer, and feel less need for the presence of others to feel secure.

		Tracks								Skill			
	Total sample	Tongariro Alpine Crossing	Avalanche Peak Track	Mt Taranaki Summit Climb	Omanawa- nui Track	Mueller Hut Route	Gertrude Saddle Track	Angelus Hut & Routes	Brewster Track	Beginner	Intermediate	Advanced	Expert
I will RELY on my companions/other guests to keep me safe on this tramp/hike	40%	51%	39%	41%	40%	36%	33%	26%	37%	54%	42%	38%	32%
I will RELY on safety / other organisations to keep me safe on this tramp/hike	28%	40%	26%	27%	30%	25%	16%	21%	22%	41%	31%	25%	19%
I am able to contact/alert emergency service at ALL times and locations	58%	63%	57%	60%	56%	56%	51%	65%	54%	59%	58%	56%	66%
If I do NOT return as planned, a person/organisation WILL notify emergency services	63%	71%	58%	67%	52%	57%	52%	72%	69%	58%	65%	63%	59%
The safety messages/signs are intended for people LESS capable than me	26%	23%	28%	27%	26%	25%	27%	32%	25%	22%	23%	28%	32%
The safety messages/signs EXAGGERATE the hazards and risks present on tramps/hikes	26%	21%	29%	28%	23%	27%	24%	30%	28%	29%	24%	26%	29%
I feel SAFER when there are other people on the track/trail	69%	71%	65%	69%	67%	70%	72%	65%	73%	76%	75%	68%	52%
The most popular tracks/trails are always the SAFEST tracks/trails	30%	31%	33%	30%	35%	28%	23%	30%	26%	43%	32%	29%	20%
Sample size (n=)	1,239	336	251	230	203	161	160	148	134	111	578	725	188



# PERCEPTIONS OF SAFETY SUPPORT - 2020 COMPARED WITH 2025

#### Main changes:

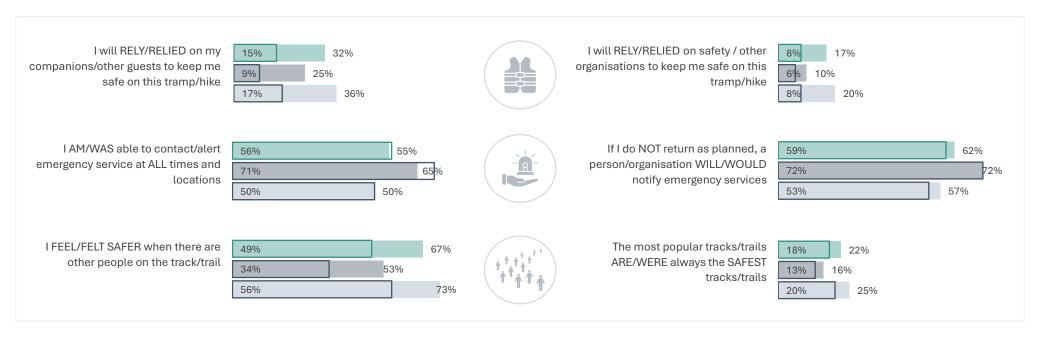
- Across all hikers, reliance on companions has dropped sharply (-17%, from 57% to 40%), as has reliance on safety/organisations (-17%, from 45% to 28%).
- New Zealand hikers showed the biggest drop in trust in reliance on companions (-26%) and organisations (-19%).
- International visitors continue to feel safer around others (72% vs. 67% for New Zealanders) and are less likely to believe someone will raise the alarm if needed.
- Both groups are less likely to assume popular tracks are safer, but this perception has dropped more sharply amongst New Zealand hikers (-16%) than internationals (-5%).

	Total sample		N	Z	International	
	2020	2025	2020	2025	2020	2025
I will RELY on my companions/other guests to keep me safe on this tramp/hike	57%	40%	53%	27%	58%	44%
I will RELY on safety / other organisations to keep me safe on this tramp/hike	45%	28%	33%	14%	48%	32%
I am able to contact/alert emergency service at ALL times and locations	56%	58%	58%	63%	55%	57%
If I do NOT return as planned, a person/organisation WILL notify emergency services	62%	63%	78%	74%	57%	59%
The safety messages/signs are intended for people LESS capable than me	33%	26%	31%	24%	33%	27%
The safety messages/signs EXAGGERATE the hazards and risks present on tramps/hikes	28%	26%	27%	17%	29%	29%
I feel SAFER when there are other people on the track/trail	67%	69%	62%	57%	68%	72%
The most popular tracks/trails are always the SAFEST tracks/trails	38%	30%	38%	22%	38%	33%
Sample size (n=)	720	1,623	157	384	563	1239



# PRE- AND POST-HIKE SAFETY PERCEPTIONS

- The respondents who completed the post-hike survey had also completed the pre-hike survey, allowing for a direct comparison of perceived versus actual challenge.
- Perceptions of safety support declined post-hike Hikers were less likely to agree post-hike that companions or safety organisations would keep them safe. This suggests their actual experience may have fallen short of expectations. This is apparent both amongst New Zealanders and international hikers.
- Confidence in emergency contact was stable pre- and post-hike Agreement levels pre- and post-hike were similar for the ability to contact or alert emergency services, either themselves or via others. New Zealanders' confidence increased slightly (71% post vs. 65% pre-experience). However, international hikers showed less confidence that someone would alert emergency services if they failed to return.
- Perceived safety from others on the trail declined post-hike Agreement dropped from 67% pre-hike to 49% post-hike, indicating hikers felt less safe than expected when others were present on the track. A similar (though smaller) drop was seen in agreement with the statement: "the most popular tracks/trails ARE/WERE always the safest." These patterns were broadly consistent across the total sample, New Zealand, and international hikers.



Post - Total

Post - NZ

Post - Int'l

Pre - Total

Pre - NZ

Pre-Int'l



# PERCEPTIONS OF SAFETY MESSAGES AND SIGNS



5%

3%

6%

10%

12%

10%

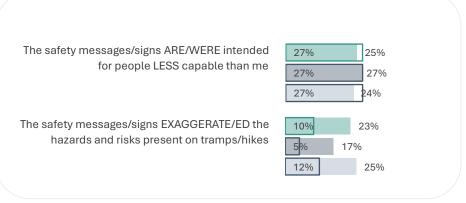
Disagree - NZ Agree - NZ

Disagree - Int'l Agree - Int'l

- · Across all groups (total sample, New Zealand, and international visitors), hikers consistently agreed before and after their hike that safety messages and signs are aimed at less experienced hikers.
- The belief that safety signs exaggerate risk dropped significantly after the hike, indicating that some hikers came to see the risks as accurately represented once they had experienced the track.
- International hikers were generally more likely than New Zealanders to view safety messages as exaggerated, but both groups showed a similar shift in perception after completing the hike.
- Most hikers recognised the value of safety messages, signs, and trail markers, disagreeing that they were confusing, unhelpful, or ineffective at improving safety.

Pre-NZ

Pre-Int'l



Post - Total

Post - NZ

Post - Int'l



The safety messages/signs/markers on THIS

track/trail were CONFUSING/UNHELPFUL



Only post survey

86%

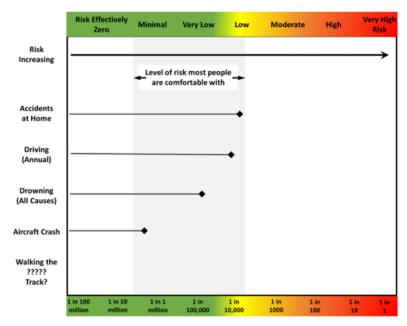
86%

86%

# PALING PERSPECTIVE SCALE: PERCEPTION OF RISK OF DEATH

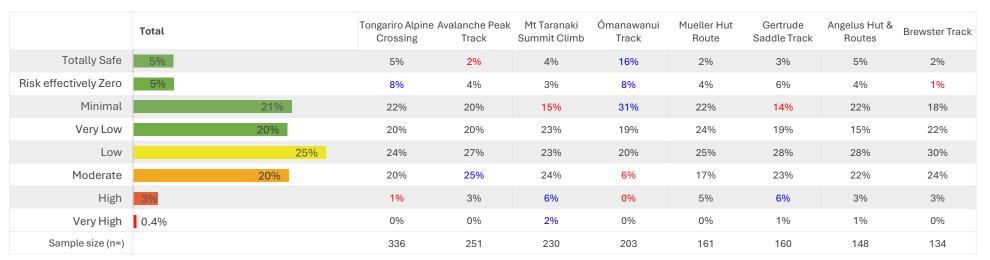
- More than half of hikers rated the level of risk for their walk as 'totally safe' to 'very low'; this was more so for the Tongariro Alpine Crossing and Ōmanawanui Track.
- One quarter rated the risk level as 'low'; this was less so for Ōmanawanui and more so for Brewster, Gertrude Saddle and Angelus Tracks.
- At the higher end of the scale, 3.4% of hikers rated their walk as 'high' or 'very high' risk, with more rating Mt Taranaki Summit Climb, Gertrude Saddle Track, and Mueller Hut Route Tracks as high/very high risk.
- Younger hikers (under 30) were more likely to perceive lower levels of risk, while those aged 40 and above were more likely to perceive higher risk.
- There were no significant differences in risk perception by gender or between New Zealand and international hikers.

#### Annual Risk of Accidental Death Scale



#### © John Paling 2000.

#### PALING PERSPECTIVE SCALE RATING [1]



# PALING PERSPECTIVE SCALE: PERCEPTION OF RISK OF DEATH - 2020 COMPARED WITH 2025

#### Decline in perceived risk:

- "High" risk perception halved (from 6% to 3%).
- "Very high" risk perception dropped further (down from 1% to 0.4%).
- "Moderate" risk perception saw the largest drop (down from 42% to 20%).

#### Increase in perceived safety:

- "Minimal" risk perception rose significantly (from 8% to 21%).
- "Very low" increased (from 12% to 20%).
- "Risk effectively zero" more than doubled (from 2% to 5%).
- "Totally safe" appeared in 2025 for the first time at 5% a new category indicating growing confidence.
- "Low" risk dropped slightly (down from 29% to 25%).

#### Interpretation:

Overall, the trend is toward lower perceived risk of death while hiking, with the bulk of responses shifting from "Moderate" to categories expressing greater confidence in safety.

The sharp drop in "Moderate" and "High" ratings and rise in "Minimal" and "Very Low" suggest that hikers increasingly view tracks as benign. This shift may reflect better access to information, familiarity with tracks, or a reduction in perceived seriousness of hazards. However, the decline in perceived risk could also indicate overconfidence, which has implications for safety messaging and risk communication.

#### PALING PERSPECTIVE SCALE RATING [1]

	2020	2025	Change +/-
Totally Safe	N/A	5%	+5%
Risk effectively Zero	2%	5%	+3%
Minimal	8%	21%	+13%
Very Low	12%	20%	+8%
Low	29%	25%	-4%
Moderate	42%	20%	-22%
High	6%	3%	-3%
Very High	1%	.4%	6%
Sample size (n=)	1,423	1,623	





# **HIKER PERSONAS: OVERVIEW**

- Data relating to respondents' demographics, trip characteristics, previous experience and risk profile was used as input to a latent class analysis to generate segments of hikers with distinctive characteristics.
- Five hiker segments were identified, distinguished by key differences summarised in the table below.
- Where there are blank spaces, this means that that the characteristics of that segment were not significantly different from the total sample.

Segment	Risk-Averse Planner	Informed Expert	Risk-Tolerant Expert	Naive 'Learner'	Impulsive Novice
Persona	Most prepared/ risk-averse hikers	'Serious', advanced hikers	'Relaxed', expert hikers	'Casual', family/couple hikers	'Casual', friend group hikers
Percentage of total sample	12%	31%	20%	21%	17%
Group type	Family/couple, friends	Solo	Solo and family/couple	Family/couple	Friends
Decision-making horizon	2+ months ago	Last week	Within 2 days	Last month	Today
Information sources used	Various information sources	Skews DOC website, DOC visitor centre, DOC brochure.	Fewest information sources used	Skews family/friends, social media, mobile apps, people who did the hike	Fewer information sources
Skill level (self-assessed)	Beginner/intermediate	Advanced	Expert	Intermediate	Beginner/intermediate
Risk preference	Highest risk avoidance	-	-	-	-
Risk / misadventure encountered	-	17%	Highest (18%)	-	-
Pre-hike preparedness	Well-prepared	Well-prepared	Well-prepared	Not well-prepared	Not well-prepared
Pre-hike challenge assessment	Extremely	Slightly/not at all	Intermediate	Very	Very
Paling perspective scale – perception of risk of death	Totally safe /zero risk	Low/very low risk	Low/very low	High risk	Moderate



# RISK-AVERSE PLANNER



12% of total sample

#### **OVERVIEW**

- Most likely international visitors seeking more popular tracks such as Tongariro Alpine Crossing.
- Youngest compared with other segments; skews couple or group rather than solo.
- Skews beginner/intermediate level hikers, hiking once or twice in the past year.

#### **PSYCHOLOGICAL PROFILE**

- Longest decision-making horizon (2+ months ahead).
- Most likely to use various sources of information, i.e., family/friends, social media, mobile apps, guidebooks, MSC, DOC brochure, MSC, tourism operator.
- Most likely to trust various sources of information i.e., family/friends, DOC website, official visitor website, guidebook, social media, mobile apps, tourism operators.
- Most likely to use social media sites, 17% using CamperMate.

- · Most likely to avoid risk.
- More likely to be prepared with information, skill, experience, fitness level, equipment, food & drink needed for the hike.
- Most likely to have everything to survive a night in the open.
- Most likely to be aware of weather and/or the natural hazards encountered on the tramp/hike.
- Perception of challenge: skews 'Extremely'.
- Most likely to agree that a person/organisation would notify emergency services if they do not return as planned, and that they are able to contact/alert emergency service at all times and locations.
- Most likely to rely on companions or other safety / other organisations to keep them safe on this tramp/hike.
- Most likely to agree that popular tracks are the safest tracks and that they feel safer when there are people around.
- Most likely to agree that the safety messages/signs exaggerated the hazards and risks present on tramps/hikes.
- Paling perspective: skews Totally safe, risk effectively zero.

# **INFORMED EXPERT**



31% of total sample

#### **OVERVIEW**

- Most likely advanced-level hikers seeking more challenging tracks such as Avalanche, Mueller, Gertrude, Angelus.
- Skews 20-29 years and solo (rather than couple or group).
- Most likely to hike most often in the past year; skews to more than 5 times in the past year.

#### **PSYCHOLOGICAL PROFILE**

- More likely to have made the decision within last week.
- More likely to use DOC website, DOC visitor centre, DOC brochure.
- More likely to trust people who did the hike, DOC website, DOC brochure, DOC visitor centre, i-site and MSC.
- More likely to use Facebook and Metservice.
- Most likely to visit/contact DOC visitor centre.
- Most likely to have experience tramping/hiking in NZ's backcountry.

- More likely to want to encounter some risk.
- More likely to have been previously lost or rescued when tramping.
- More likely to be prepared with information, skill, experience, fitness level, equipment, food & drink needed for the hike.
- More likely to have everything to survive a night in the open.
- More likely to be aware of weather and/or the natural hazards encountered on the tramp/hike.
- Perception of challenge: skews 'slightly' or 'not at all'.
- Paling perspective: skews 'low' or 'very low'.

# RISK-TOLERANT EXPERT



20%

of total sample

#### **OVERVIEW**

- Most likely expert-level hikers seeking more challenging tracks such as Avalanche, Mueller, Gertrude, and Angelus.
- Skews 30-49 years; solo and family/couple included.
- Most likely to hike most often in the past year; skews more than five times in the past year.

#### **PSYCHOLOGICAL PROFILE**

- More likely to have made the decision within 48 hours.
- Least likely to use various sources of information.
- Least likely to use any media social media sites or mobile apps.
- More likely to have experience tramping/hiking in New Zealand's backcountry.

- Most likely to want to encounter some risk.
- More likely to have been seriously injured when tramping.
- More likely to be prepared with information, skill, experience, fitness level, equipment, food & drink needed for the hike.
- More likely to have everything to survive a night in the open.
- More likely to be aware of weather and/or the natural hazards encountered on the tramp/hike.
- · Perception of challenge: skews 'intermediate'.
- Less likely to rely on companions or other safety / other organisations to keep them safe on this tramp/hike.
- Less likely to agree that popular tracks are the safest tracks and that they feel safer when there are people around.
- Paling perspective: skews 'low' or 'very low'.

# **NAIVE 'LEARNER'**



21% of total sample

#### **OVERVIEW**

- Most likely intermediate-level hikers seeking less challenging tracks such as Tongariro or Mt Taranaki.
- Skews 15-19 years and 60+ years, and family/couple.
- More likely to have hiked less than three times in the past year.

#### **PSYCHOLOGICAL PROFILE**

- More likely to have made the decision within last month.
- More likely to use limited sources of information.
- More likely to use family/friends, social media, mobile apps, and people who did the hike as source of information.
- More likely to use Instagram, TikTok, 18% using CamperMate.

- Least likely to be prepared with experience needed for the hike.
- Least likely to be aware of the natural hazards encountered on the tramp/hike.
- Perception of challenge: skews 'very'.
- Less likely to agree that that they are able to contact/alert emergency service at all times and locations.
- · Paling perspective: skews 'high'.

# **IMPULSIVE NOVICE**



17% of total sample

#### **OVERVIEW**

- Most likely intermediate/beginner-level hikers seeking less challenging tracks such as Ōmanawanui, Avalanche,
   Brewster.
- Skews 15-19 years and 20-39 years, and friends.
- More likely to have hiked four or five times in the past year.

#### **PSYCHOLOGICAL PROFILE**

- More likely to have made the decision on the day.
- More likely to use limited sources of information.
- More likely to use social media sites.
- More likely to trust DOC brochure, i-site and/or guidebooks.
- More likely to use Instagram.
- Less likely to use mobile apps.

- Least likely to be prepared with information, skill, fitness level and equipment needed for the hike.
- Least likely to be aware of the weather.
- Perception of challenge: skews 'very'.
- Paling perspective: skews 'moderate'.



# **DETAILED METHODOLOGY – QUANTITATIVE DATA COLLECTION**

The quantitative research is an update of a study first published by DOC in 2020 and uses a similar methodology to allow for effective comparative analysis and the development of a longitudinal dataset.

It is noted that while some minor changes to the approach have been made, these have not compromised the integrity of the tracking data. Specifically:

- The first survey was undertaken by a DOC staff member in uniform.
  Conducting the survey independently removed any potential bias in the
  responses. While we expected that this may have resulted in a higher
  refusal rate than the 2% reported for the first survey, this did not eventuate,
  and nearly all hikers approached to participate did so.
- The Cascade Saddle Track at Mt Aspiring, which struggled for respondents in the first survey, and had a relatively low number of reported incidents (5 in the last 8 years), was omitted.
- Brewster Track in the Mount Aspiring National Park was added.
- An Auckland Council recreation site (Ōmanawanui) that met the criteria of a history of incidents and accidents was added.
- The results include tracking data from six original sites and new data from the two new sites.
- The survey tools (pre-hike and post-hike questionnaires and Paling Perspective Scale Graphic – appended) largely replicated the original survey tool, with minor adjustments for context and for changes in information sources and social media channels since the research was first undertaken in 2020.

#### **Survey Sites**

Surveys were undertaken at a total of eight sites, distributed across seven national and one regional park. These sites were selected by the LSF for their history of incidents and accidents, as well as their known popularity with the international visitor demographic of greatest concern.

#### The eight sites were:

- · Tongariro Alpine Crossing
- Fiordland Gertrude Saddle Route
- Aoraki / Mt Cook Mueller Hut Route
- Arthur's Pass Avalanche Peak Track
- Nelson Lakes Angelus Hut Route (Robert Ridge)
- Te Papa-Kura-o-Taranaki Mt Taranaki Summit Climb
- Mount Aspiring Brewster Track
- Waitakere Ranges Regional Park Ōmanawanui Track



## SAMPLE ACHIEVED

		Sam	ple Achieved				
National / Regional Park	Track	Pre-trip	Survey	Post-trip Survey			
		2020 Survey	2024/25 Survey	2020 Survey	2024/25 Survey		
Fiordland	Gertrude Saddle Route	85	160	68	76		
Aoraki/Mt Cook	Mueller Hut Route	93 [1]	161	103	68		
Arthur's Pass	Avalanche Peak Track	169	251	141	102		
Nelson Lakes	Angelus Hut Route (Robert Ridge)	96	148	NA [2]	45		
Te Papa Kura-o- Taranaki	Mt Taranaki Summit Climb	212	230	75	57		
Tongariro	Tongariro Alpine Crossing	228	336	177	24		
Waitakere Ranges Regional Park	Ōmanawanui Track	NA [4]	203	NA [4]	45		
Mt Aspiring National Park	Brewster Track	NA [4]	134	NA [4]	50		
Mt Aspiring National Park	Cascade Saddle	15 [1]	NA [3]	21	NA [3]		
		N=898	n=1,623	n=525	n=467		

<sup>[1]</sup> The 2020 pre and post-hike surveys included two separate sets of hiker data. Unlike, the 2025 survey, the post-hike surveys were not generated by the pre-hike surveys, which is why the post-hike survey samples exceed pre-hike survey samples in some instances.

<sup>[4]</sup> Brewster and  $\bar{\text{O}}\text{manawanui}$  tracks were not included in the 2020 survey.



<sup>[2]</sup> No post hike survey data was collected in 2020.

<sup>[3]</sup> Cascade Saddle was not included in the 2025 survey.

# **QUALITATIVE RESEARCH – KEY FINDINGS**

A summary of the key findings and insights from the qualitative focus groups follows. The reader is referred to the full report for a more detailed discussion of these findings.

#### Methodology:

Two focus groups were conducted in Christchurch in July 2024 amongst those with a self-professed enjoyment of the New Zealand outdoors; one group with those who self-assessed themselves as having more experience and one group who self-assessed themselves as having less experience, (knowledge, and leadership capabilities) in the outdoors.

**Caveat:** While the qualitative findings provide some useful and interesting context and insights, they are not statistically robust and should be considered as indicative and not conclusive.

#### Overview:

Participants' risk tolerance affects their choice of outdoor activities and the thoroughness of their planning and risk assessment. Those with a high emphasis on safety engage in more detailed and careful planning, while those more comfortable with risk tend to prioritise excitement and adventure, often with less focus on comprehensive safety measures.

#### Behavioural dynamics among less experienced participants:

- Safety-oriented Individuals focus heavily on safety and preparedness. They
  conduct thorough planning and carry essential safety equipment like
  communication devices and PLBs. This group's planning reflects a low
  appetite for risk, with a strong emphasis on personal responsibility and
  adherence to safety guidelines.
- More relaxed individuals take a more casual approach to safety and planning. They prefer less structured activities and may not engage in rigorous preparation. While they acknowledge the importance of safety, their planning tends to be less extensive, reflecting a moderate appetite for risk where safety is considered but not prioritised.

#### Behavioural dynamics among more experienced participants:

• Higher risk appetite participants seek out adventurous and high-risk activities like backcountry skiing and challenging hikes. Their planning focuses as much on finding exciting routes, emphasising discovery, and adventure as on stringent safety precautions. This approach may involve less detailed risk assessment and preparation, with a focus more on the rewards and excitement of the experience. Lower risk appetite participants favour safer, less demanding, or potentially dangerous activities. Their planning is more thorough and cautious, prioritising safety by selecting well-known, low-risk routes and considering factors like weather conditions, terrain difficulty, and safety measures. Their approach aims to minimise risk and ensure personal well-being.

#### Impact on planning and risk assessment:

- The appetite for safety and risk shapes participants' planning processes. Those
  prioritising safety invest time in thorough planning, including route selection,
  weather checks, and emergency preparedness. In contrast, those with a higher
  risk appetite may streamline planning to prioritise adventure, potentially
  overlooking some safety aspects.
- Experienced participants often integrate their knowledge and past experiences into planning, enhancing their ability to anticipate and mitigate risks. Less experienced participants might rely more on external guidance and structured planning tools provided by safety organisations.

#### Factors influencing risk perception and planning:

- Personal responsibility, experience, and skill level play crucial roles in shaping how participants approach risk assessment and planning.
- Peer influence, available signage, information accessibility, perception of risk, potential consequences, and environmental factors also heavily influence participants' planning and safety strategies.
- Participants with higher risk appetites are more likely to rely on personal experience and group dynamics, whereas those with lower risk appetites are more influenced by external information, signage, and a cautious approach to potential hazards.

angus & associates

# **QUALITATIVE RESEARCH - KEY FINDINGS (CONT.)**

#### Role of safety organisations and education:

- · Clear and comprehensive signage, education initiatives, and awareness campaigns by organisations like the Mountain Safety Council and Department of Conservation are vital in promoting safety and preparedness among outdoor enthusiasts.
- Providing up-to-date information on trail conditions, weather, and safety guidelines can enhance decision-making and encourage a more proactive approach to risk assessment and planning.

#### Mitigating poor decision making and risk taking:

Participants acknowledge and commend the extensive work done (past and ongoing) to keep people safe in the outdoors. They also recognise their own and others' failings - short memories, carelessness, influence of others, resulting in poor decision making - and the continuing requirement for education and reinforcement of key messaging. Although many individuals know what they should do to stay safe they need reminding to:

- Educate themselves
- Conduct thorough research from verified sources
- (Truthfully) assess their personal capabilities
- Plan ahead
- Carry appropriate safety equipment
- Stay updated on weather and conditions
- Follow signage and guidelines
- Practice situational awareness
- Communicate and share plans
- Learn from experiences

Furthermore, while participants accept, they are personally responsible for their own actions, they also believe DOC, MSC and other organisations have a responsibility to support them to make good decisions by:

- Ensuring signage is clear, up-to-date, and easily understandable. This could include more detailed explanations for any restrictions (track closures) or dangers and using internationally recognised symbols or QR codes for additional information.
- Continuing to educate the public about outdoor safety, emphasising personal responsibility, the importance of proper gear, and understanding the difficulty levels of different activities. Like water safety, outdoor education is expected to be ongoing and to communicate, remind, and reinforce key messages to both experienced people and those who are new to the outdoors.
- · Producing campaigns and educational materials that emphasise the importance of preparation, risk assessment, and following safety guidelines, highlighting the consequences of reckless behaviour.
- · Maintaining real-time data on track conditions, weather, and potential hazards, accessible through websites, apps, and other non-internet-based channels.
- · Working with local councils, tramping and other outdoor recreation organisations (mountain biking, trail running, multi-sport, kayaking, skiing, 4WD, for example), schools, environmental and other community groups, to share safety information and promote responsible outdoor practices.
- Developing a clear, standardised rating system to indicate the level of risk associated with different trails or activities e.g., beginner, easy, intermediate, advanced, expert. The current trail grading system alludes to this in the track descriptions, but the symbols / icons do not.
- Engaging with the public, through social media, school, and community events, to answer questions, and provide guidance on safety and risk management.
- Enforcing compliance with safety guidelines and consider implementing penalties for those who disregard rules and risk the life of others.



# **QUALITATIVE RESEARCH - KEY FINDINGS (CONT.)**

#### Other ways to promote safety in the New Zealand outdoors could include:

- Organised group activities led by experienced individuals to 'pay it forward;' to guide, train, and pass on their knowledge to future generations.
- Encouraging individuals to share incidents (near misses) as learning opportunities for future decision-making for themselves and others (potentially sharing their stories and what they should have done differently).
- Promoting continuous assessment and adaptation of plans based on new information, feedback, and evolving conditions.
- Stressing the importance of safety as the top priority, even if it means limiting
  the level of adventure or enjoyment in outdoor activities. For example,
  encourage walkers to be adaptable, revert to Plan B, or choose a walk suitable
  for the least fit, adventurous, or experienced party member.

#### Conclusion

- Participants' perceptions, behaviours, and planning strategies regarding risk assessment and safety in the New Zealand outdoors are diverse, reflecting a spectrum of risk appetites and safety priorities.
- Understanding these dynamics is critical for developing effective strategies to enhance safety awareness and reduce risks.
- Balancing the thrill of adventure with the need for safety is essential for fostering a responsible and enjoyable outdoor culture in New Zealand, where Government and national safety organisations play a key role in supporting this balance through education, clear communication, and accessible information.



