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Annual Visits to NPWS Managed Parks in New South Wales

May 2021

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Contents

1. Executive Summary

1.1 Background

In January 2008, the then NSW Department of Environment and Climate Change (DECC), commissioned Roy Morgan to conduct a thirteen-wave telephone survey to estimate annual visits to NSW NPWS managed Parks for the 2008 calendar year. In order to determine the best approach to provide a *reliable* estimate of the number of park visits, Roy Morgan undertook a pilot survey in September-October of 2007. The resultant approach recommended from the pilot was confirmed and approved by DECC. Roy Morgan was recommissioned to repeat the study in 2010, and has since been commissioned by the National Parks and Wildlife Service (NPWS) as a Directorate of the Department of Planning, Industry and Environment (DPIE) to conduct the study every two years from 2012, with the most recent survey being conducted in 2020. This report provides a summary of findings from the 2020 survey.

Interviewing was conducted by Computer Assisted Telephone Interviewing (CATI) and eligible respondents to the survey had to be aged 18+ years, living in Sydney, Remainder NSW, ACT, Melbourne, Remainder VIC, Brisbane and Remainder Southern QLD. The sampling frame was modified from the 2012 survey onwards, using Random Digit Dialling (RDD) for both landline and mobile phone numbers, as opposed to the Electronic White Pages (EWP) used in the 2008 and 2010 surveys[1]. Interlocking quotas were set for age by sex by region to ensure representativeness across those areas. A total of 1,200 interviews were conducted each wave, with the overall sample size after wave thirteen in 2020 being 15,638 people.

The term *visitation*[2] used throughout this report is defined as the number of *visits* made to NPWS managed parks, not the number of *visitors* to these parks (i.e. a visitor can make more than one visit to NPWS Parks in any given four-week period).

1.2 Approach to Calculating and Improving the Park Visitation Estimate

As was the case for the 2008, 2010, 2012, 2014, 2016 and 2018 surveys, in calculating the 2020 annual NPWS Park visitation estimates, a *robust* approach was undertaken. It was agreed that it was better to derive an estimate that is likely to err on the side of caution, than derive an estimate that could be unduly inflated. The main methods used to ensure that an informative estimate was derived included:

- Limiting survey scope to regions where visitation to NSW was likely and significantly large, in order to strengthen the confidence limit of the estimate;
- Conducting the survey as a 'stand-alone' survey, rather than 'piggy-backing' questions on an Omnibus style survey, in order to improve response rates and reduce non-response bias, thereby improving the reliability of the estimate;

[1] 2008 and 2010 survey estimates have now been adjusted to account for the change in the sampling frame.

[2] Visitation calculation = [Σ(number of adult visits to a NPWS Park obtained for each respondent multiplied by their individual *population* survey weight for all 13 survey waves) + (Σ(number of child visits to a NPWS Park for each household multiplied by their *household* survey weight for all 13 survey waves)} x non-response error adjustment.

- Expanding the scope of the survey using an RDD sampling approach to include responses from new numbers, silent numbers and households that only have mobile phones in order to ensure that the entire population has an opportunity to complete the survey;
- Limiting recall of visitation to 'within the last 4 weeks' to improve accuracy of recall;
- Asking respondents to name the park they visited, ensuring that the park visited could be categorised as being either NPWS or non-NPWS managed, thereby minimising the inclusion of out-of-scope visits;
- Posing a series of questions to confirm park type when the respondent could not recall the park name to again minimise out-of-scope visits;
- Including confirmation questions for high numbers of visits and high numbers of children visiting to ensure that potential outliers were valid; and
- Excluding any children over and above the number in the household, if an adult in the respondent's household was not responsible for the care of these children on that visit, so as to minimise the likelihood of double-counted child visits.

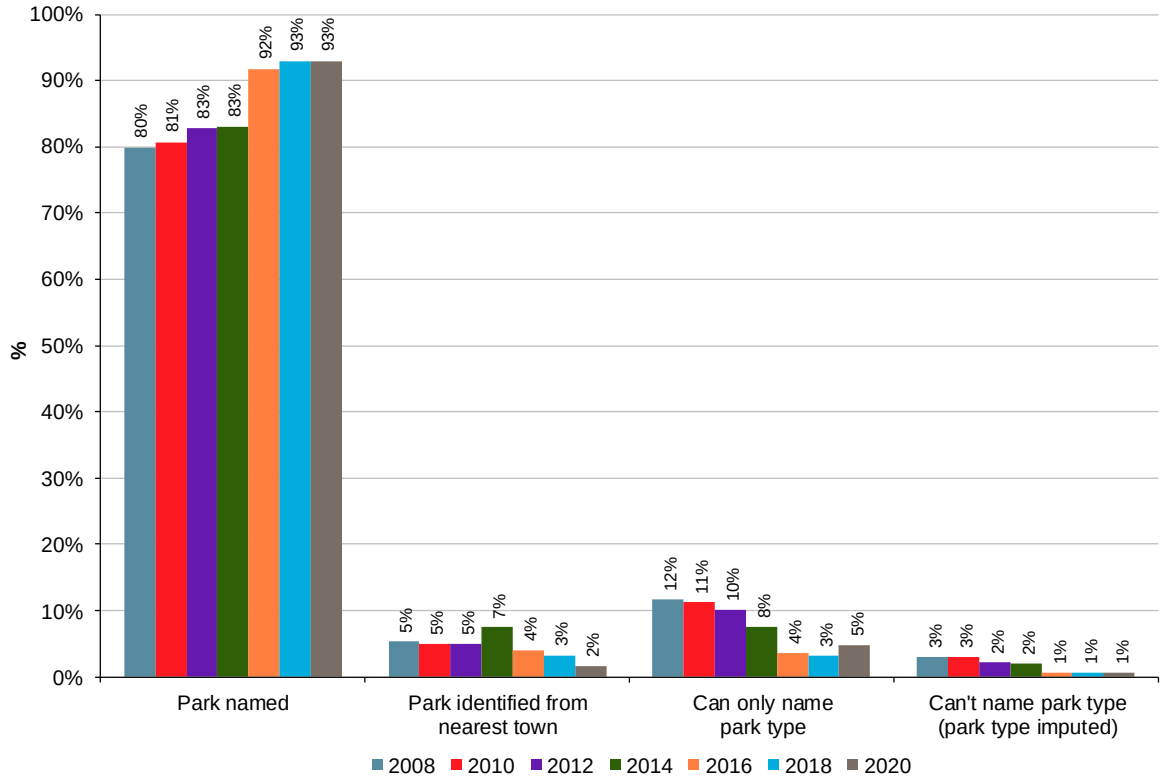
Furthermore, in order to ensure that the final NPWS Park annual visitation estimate obtained was as accurate as possible, and that the survey estimates were comparable over time, procedures were put in place to ensure that the quality of survey data obtained improved as the survey progressed (i.e. from wave to wave). Such quality improvement practices included:

- Where necessary, updating lists of NPWS Park names and their aliases at the end of each wave to improve park categorisation;
- Adding names of non-NPWS Parks regularly visited to the survey frame to assist in easily identifying and excluding parks not in-scope for the survey;
- Including the actual date four weeks prior to the date of interview in the questionnaire, to minimise the effects of telescoping—the tendency for respondents to over-estimate the time period when they last visited a park (e.g. respondents will name a park they visited 5 weeks age when they were asked to name a park they visited in the last 4 weeks);
- A rigorous post-field 'cleaning' phase of any responses where a park 'type' could not be assigned at the time of interview;
- Referring parks that could not be classified to the NPWS for a final decision on categorisation;
- Calculating non-response error to enable potential adjustment of the estimate to account for differing rates of park visitation by respondents and non-respondents to ensure that the final visitation estimates reflect the actual 'real world' visits; and
- Re-calculating the 2008 and 2010 visitation estimates to account for the sampling frame change from EWP to RDD.

After thirteen waves of the 2020 survey, two major aspects allowed for great confidence in the visitation estimate obtained. Firstly, in 2020, 1,152 respondents (97.8%) could spontaneously name the park they visited or recalled the park name once prompted from a list of associated parks within close proximity to a number of towns in New South Wales - a result consistent with 2016 and 2018 results (see Chart A). The provision of park names enabled accurate categorisation of the park to either NPWS or non-NPWS categories. Similar surveys only ask respondents to name the *type* of park visited, which relies on respondents understanding the different type of parks and their associated management structures. The 2007 pilot survey results showed that a significant 50% of respondent's categorised the NSW park type incorrectly, so minimising the amount of self-

categorisation in all main survey waves has strengthened the *accuracy* of the visitation estimates for this survey structure. For the 2020 survey, only 2.2% of responses were categorised as either a NPWS or non-NPWS Park by park type only (1.5% allocated by respondent, 0.7% imputed, as the respondent was uncertain of the park type).

Chart A: Allocation of Park Type by Method[3]



Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=1,563; 2010 n=1,389; 2012 n=1,421; 2014 n=1,651; 2016 n=1,705, 2018 n=1,718; 2020 n= 1,178

Secondly, response rates for this survey are consistently higher than those of a comparable omnibus style survey conducted at the same time as each wave (approximately 70% higher in each survey year). This demonstrates that conducting the survey via a stand-alone survey methodology is more efficient than using a shared-cost methodology. Subsequently, the survey estimate is also more reliable.

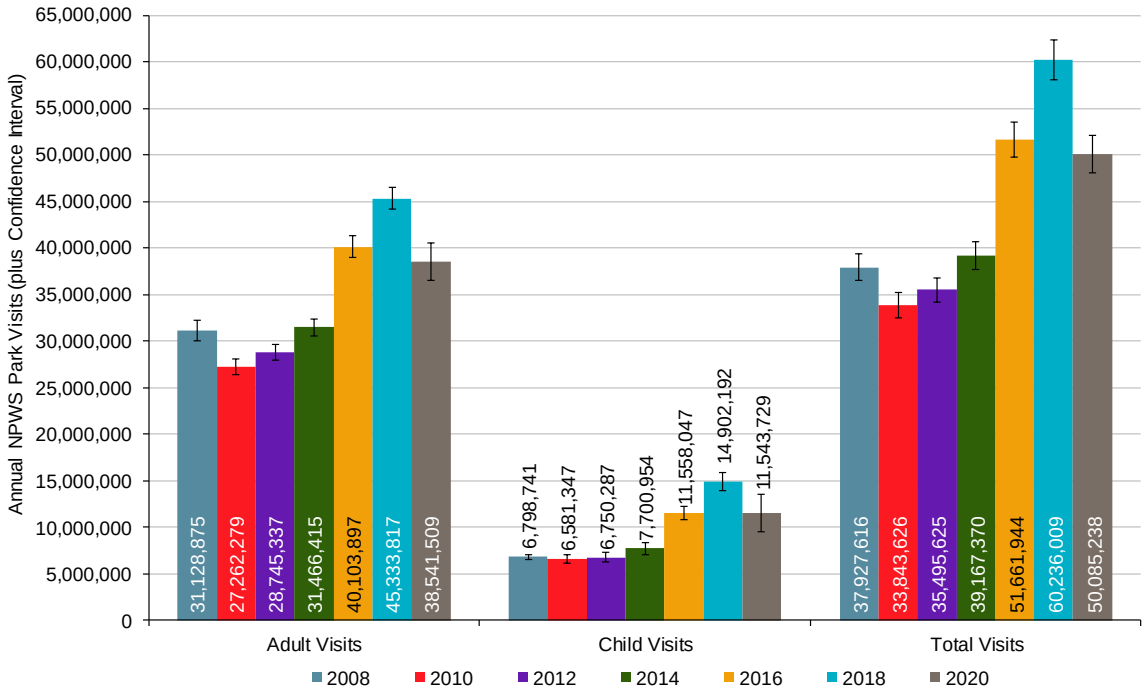
[3] If respondents could not provide the name of the park they visited, or the name of the park could not be ascertained from the town claimed to be nearest to that park, they were then asked to classify the park as being a National Park, State Conservation Area or Nature reserve or not (i.e. the *type* of park visited). Where the type of park visited could not be ascertained from a respondent's survey responses, park type was imputed based on the overall ratio of NPWS Parks named to Non-NPWS Parks named for all survey respondents visiting a park in the last 4 weeks (the ratio used in 2020 was 3:1 NPWS to non-NPWS Parks).

1.3 NPWS Park Visitation

1.3.1 Annual NPWS Park Visitation

Survey results from waves one through thirteen, along with an estimation of visitation for non-surveyed regions (excluding international visitors) provides the following annual NPWS Park visitation estimates for 2008 to 2020 (Chart B). The 2020 NPWS Park visitation estimate is the third highest attained (50.1 million visits). Adult visits comprise 77.0% of all visits in 2020, compared with 75.3% in 2018, 77.6% in 2016, 80.3% in 2014, 81.0% in 2012, 80.6% in 2010 and 82.1% in 2008.

Chart B: Final Annual NPWS Park Visitation Estimate by Year



Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=15,715; 2010 n=15,643; 2012 n=15,646; 2014 n=15,656; 2016 n=15,683, 2018 n=15,644; 2020 n= 15,638

The confidence interval for the *survey* estimate in 2020 is ±4.07% of the total estimate (±3.07% for adults; ±7.41% for children). Taking into account the 'implied' error for areas of Australia that were *not surveyed*, the total annual visitation estimate based on thirteen waves in 2020 varies from 48.0m to 52.1m. This overall margin of error (±4.07) is well within the parameters required by the NPWS (±8% at the 95% confidence level). It also means that, when taking into account the margin of error for previous surveys, the 2020 annual visitation estimate is significantly higher than the visitation estimates for 2008, 2010, 2012 and 2014, but is significantly lower than the 2018 estimate. There are no statistical differences between the 2016 and 2020 visitation estimate.

1.3.2 Impact of Non-Response Adjustment on the NPWS Park Visitation Estimate

It should be noted that the final NPWS Park visitation *survey* estimate is recalibrated to account for non-response (i.e. people *completing the survey* are likely to have a slightly higher incidence rate of visiting NPWS Parks than those contacted *who did not complete the survey*). This is undertaken by interviewers asking one final question to non-completers before the telephone call ends, as follows:

> *Q: Before you go, can I ask you one short question? In the last 4 weeks, that is, SINCE [DAY] [DATE] [MONTH], have you visited a park like a National Park in New South Wales?*

The incidence rate obtained from this question is compared with the rate obtained for a similar question asked of survey respondents:

> *Q: Thinking about PARKS anywhere at all in New South Wales, including the city or suburbs of Sydney, have you visited any parks WITHIN THE LAST 4 WEEKS, that is SINCE [Date 28 days ago}?*

The incidence rate from non-survey respondents is divided by the incidence rate from survey respondents to calculate the non-response adjustment ratio. This ratio is then applied to the NPWS visitation survey estimate to obtain the final adjusted survey visitation estimate. Since 2008, the non-response adjustment ratios have been as follows:

- 2008: 0.6927
- 2010: 0.6560
- 2012: 0.7040
- 2014: 0.5953
- 2016: 0.7667
- 2018: 0.5953
- 2020: 0.7710

As can be seen above, the 2014 non-response adjustment ratio was the lowest, whilst the 2020 ratio was the highest. This means that the 2014 visitation calculation from survey responses was down-weighted the most and the 2020 calculation was down-weighted the least to account for non-response.

The reason for this is that, in an effort to improve the accuracy of the visitation estimate, greater proportions of mobile phone numbers were contacted for interviewing in 2016 (53%), 2018 (40%) and 2020 (53%) than in 2014 (23%) in order to more accurately reflect the Australian population based on phone status (i.e. respondent or household is mobile only, landline only or has both mobiles and landlines). This increase in phone calls to mobile numbers resulted in 39% of mobile only respondents being surveyed in 2020, 29% in 2018 and 22% in 2016, compared with 9% in 2014 when the actual incidence rate in the survey populations were 57%, 33%, 26% and 24% respectively.

1.3.3 Potential Factors Influencing NPWS Park Visits

Whilst not exhaustive, the following factors have been investigated to identify whether there is any relationship between them and NPWS Park visits:

- **Major widespread disruptions to park visitation**, such as natural disasters and pandemics.
  - The 2019–20 bushfires in New South Wales (NSW) were unprecedented in their extent and intensity, with more than 7% of the state impacted and more than 37% of the NSW park system and 42% of all forests. Many NPWS parks we closed or only allowed

restricted access from December 2019 through to March 2020, impacting significantly on park visitation.

- The COVID-19 Pandemic and its associated movement restrictions impacted on access to parks from March through to December 2020, with movement within NSW severely restricted from March to June 2020. The NPWS was required to close or restrict park access from March to June 2020 as part of the government's co-ordinated response to the public health and safety threat posed by the pandemic.
- To better understand the impact of these events and restrictions on park visitation, 2020 survey results have been analysed on the basis of three distinct time periods, comparing park visitation with the same periods in 2018:

  Bushfire Period – 10 Dec 2019 to 7 Mar (waves 1-3)
  COVID-19 Affected Period – 4 Mar- 27 Jun (waves 4-7)
  COVID-19 Rebound Period – 23 Jun-10 Dec (waves 8-13)

  As these periods vary in length, analysis of visits has been made on the average visits per wave for each period. Chart C overleaf shows that overall NPWS park visitation per wave declined for the Bushfire period from 5.00m visits per wave in 2018 to 4.07m visits in 2020, a decline of 0.93m visits per wave. Whilst this decline is not statistically significant, it does provide evidence that the bushfires and resultant park closures did have a negative impact on park visitation in early 2020.

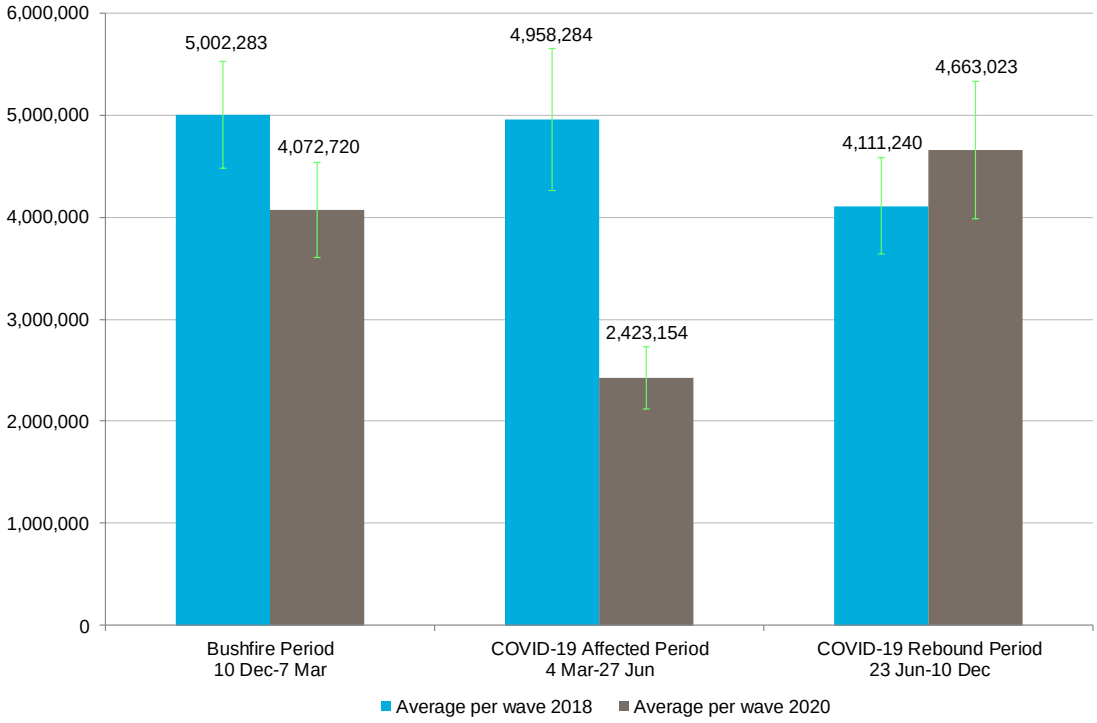
  Visitation per wave also declined significantly from 2018 to 2020 for the COVID-19 Affected period (from 4.96m visits per wave to 2.42m visits per wave – a fall of 2.54m visits per wave). COVID-19 restrictions therefore impacted significantly on visitation in 2020.

  NPWS park visits in the COVID-19 Rebound period increased from 4.11m visits per wave in 2018 to 4.66m visits per wave in 2020. Whilst the increase was not statistically significant, an increase of 0.55m visits per wave does indicate that a rebound in visitation occurred after the harshest COVID-19 restrictions were lifted.

- **Visitation to NSW**. As shown below, visitation to NPWS Parks generally mirrors visitation to and within NSW.
  - Tourism Research Australia[4] (TRA) data for both overnight visitors and visitor nights in NSW fell from 2008 to 2010; then rebounded in 2012 and has continued to increase from 2014 to 2016, then declined again in 2018 and 2020. This trend was evident for both intrastate overnight visits within NSW and interstate overnight visits to NSW. This visitation pattern closely matches the NPWS Park visitation pattern.
  - Day trip visitors to NSW increased steadily from 2008 to 2012, declined in 2014, then rebounded in 2016 and continued to increase in 2018, but declined in 2020[5]. With the majority of trips to NPWS Parks being day trips, the visitation pattern for single trips to parks should closely match day trip visitors to NSW. This is in fact the case for all years except 2018 (see Chart D overleaf).

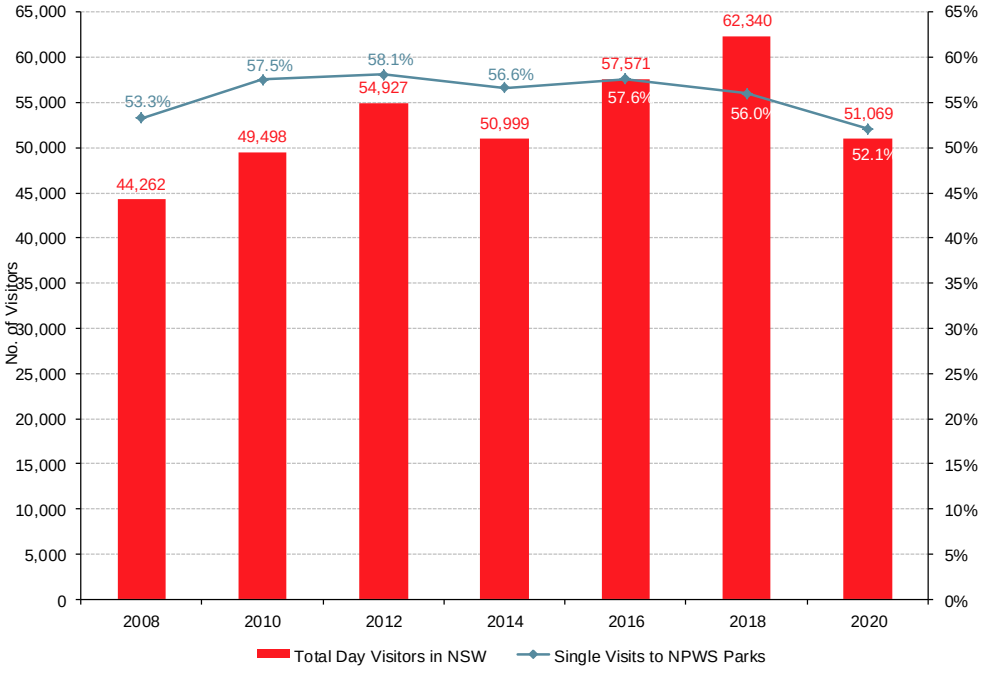
[4] Tourism Research Australia – National Visitor Survey
[5] Tourism Research Australia – National Visitor Survey

Chart C: Average Visits per Wave for COVID-19/Bushfire Periods



Source: NPWS Parks Visitor Surveys 2018 - 2020
Base: 2018 n=1,739; 2020 n- 1,178

Chart D: Single Visits to NPWS Parks versus Day Visitors in NSW



Sources: National Visitor Survey – Tourism Research Australia; NPWS Parks Visitor Surveys 2008-2020:

- Additionally, whilst this survey was not designed to calculate the number of annual visitors to NPWS Parks, using the average number of visits per adult to NPWS parks, a *proxy* for the number of adult visitors can be calculated. In 2008 the proxy number of adult visits to NPWS parks was 10.3m; in 2010 it decreased to 9.2m; in 2012 it bounced back to 10.5m; in 2014 it continued to increase to 10.8m; rose significantly to 15.0m in 2016 and increased further to 16.1m in 2018. It then declined to 12.4m in 2020. This pattern generally matches the overnight visitation pattern sourced from TRA. Therefore, it can be inferred that the number of *visitors* to NPWS Parks does in fact mirror overnight visitation in NSW.

- **Visitation to Overseas Destinations.** The impact of overseas travel is potentially inhibiting the number of trips taken to NPWS Parks.
  - Again, Tourism Research Australia[6] data shows that Australians visiting overseas has steadily increased from 5.2m visitors in 2008 to 9.8m in 2018, representing 87.2% growth over ten years. A competitive Australian dollar makes overseas travel more attractive. As a result, Australians either trade-off domestic travel for overseas travel, or shorten their domestic trips in order to travel overseas. 2020 overseas visitation could not strictly be compared due to the restrictions on overseas travel imposed as a result COVID-19.
  - Mapping Australian dollar exchange rates against NPWS Park visitation shows that exchange rates were very weak against other currencies in 2008 when park visitation was high. Similarly, exchange rates were stronger in 2010 and 2012 when NPWS Park visitation was not as high. In 2014, exchange rates were weaker, and park visitation was high, while in 2016 and 2018 exchange rates were weaker than in 2014 and visitation was extremely high. 2020 data needs to be excluded from analysis due to international border restrictions imposed as a result of the COVID-19 pandemic.
  - More in-depth analysis shows that NPWS Park visitation generally peaks over summer when people take extended holidays and declines over winter when domestic weather is more inclement and travel overseas more enticing (i.e. for summer in the northern hemisphere). However, the decline in winter NPWS Park visitation is becoming less prominent over time, so the relationship is weakening.
  - Furthermore, from 2008 to 2018, visitor nights in NSW have increased by 31.6%, while the number of overnight visitors has increased by 43.5% over the same period. This indicates that overnight visitors are staying for shorter periods when going on overnight visits, implying that the trade-off to travel overseas is more likely resulting in a reduction in the number of nights spent visiting domestically rather than trading off these visits completely with overseas travel. This is confirmed by the observed decline in average adult visits to NPWS Parks from 2008 to 2018 (2.95 to 2.79 visits). 2020 comparisions cannot bestrictly undertaken due to ther impacts on COVID-19 on interstate and intrastate visitation.

- **Economic Impacts.**
  - A higher level of confidence in the Australian economy is likely to impact positively on travel and travel to parks. When the Roy Morgan Consumer Confidence Index was

[6] Tourism Research Australia – National Visitor Survey

mapped against NPWS park visits it was found that a direct relationship between high consumer confidence and high park visitation was evident.

- Lower interest rates are likely to provide more disposable income to travel, as less money needs to be spent on mortgage and loan repayments. Mapping NPWS Park visitation against interest rates (i.e. cash rate) indicated that park visitation is not strongly linked with interest rates.

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- An increase in fuel prices is likely to impact negatively on park visitation as the increase cost to travel impacts on disposable income. Sydney fuel prices were mapped against park visitation to determine any trends. However, no trend was evident.

- **Weather Effects.**
  - Mapping NPWS Park visitation against temperature divergence[7] from the average shows a direct correlation between visitation and temperature from 2008 to 2020. When temperatures were above the average, visitation generally increased, and when temperatures were below the average, visitation generally decreased. However, the relationship appears to be weak and subject to regional temperature variations at both the respondent's region of origin and at their proposed destination.
  - Similarly, when rainfall divergence from the average is mapped against NPWS Park visitation, an opposing movement emerges, with visitation increasing when rainfall falls below the average, and decreasing when rainfall is above the average. This trend tends to be stronger than the temperature-visit correlation, but again, local rainfall at both the origin and destination of the potential visit will impact on the likelihood of actual park visitation.
  - Rather than looking individually at rainfall and temperature, it can be noted that significant and sustained weather events are also likely to have an impact on park visitation. 2008 was a dry year, and visitation was high. 2010 was the third wettest on record, and visitation was low. 2012 started off cool and wet, and ended warm and dry; as a result, NPWS Park visitation was low early in 2012 and high towards the end. 2014 was (at that time) the warmest year on record, and the driest since 2006, resulting in high visitation until winter. In 2016, summer and autumn were warm and it was generally warm in winter and spring, with park visitation being the highest recorded to that time. The 2018 year outstripped 2014 to become the warmest year on record and the 6th driest on record. This made conditions favourable for park visitation and resulted in 2018 having the highest visitation levels so far estimated. In 2020, a cooler and wetter first half of the year resulted in a decline in visits, but the warmer and drier second half of the year resulted in higher visits, most likely exacerbating the impact of more influential factors in 2020, such as the COVID-19 pandemic and 2019-20 bushfires.. Of course, local weather events will impact on local visitation as well. For example, floods and rains as a result of cyclones impacted on communities in 2010, which would have impacted on park visits.

Essentially, the above shows that the combined effects of natural disasters, pandemics, domestic visits to NSW, levels of overseas visitation, the economic climate and weather influence NPWS Park visitation levels.

[7] Bureau of Meteorology – Climate Data Online.

1.3.4 Annual Visitation by Region of Origin

Intrastate visitation comprised 92.0% of all visits in 2020, compared with 87.2% in 2018, 87.5% in 2016, 90.5% in 2014, 88.6% in 2012, 88.3% in 2010 and 90.8% in 2008. By comparison, interstate visitation comprised 8.0% of visits in 2020, compared with 12.8% in 2018, 12.6% in 2016, 9.5% in 2014, 11.4% in 2012, 11.7% in 201 and 9.2% in 2008) (see Table A).

Table A: Final Annual NPWS Park Visitation Estimate by Region of Origin

Final Adjusted Annual NPWS	Adult Visits		Child Visits		Total Visits	
Park Visitation Estimate 2020[1]	No.	%	No.	%	No.	%
Sydney	24,643,448	63.94%	7,352,996	63.70%	31,996,444	63.88%
Remainder NSW	10,759,161	27.92%	3,303,813	28.62%	14,062,974	28.08%
ACT	568,640	1.48%	144,258	1.25%	712,899	1.42%
Melbourne	638,612	1.66%	83,432	0.72%	722,045	1.44%
Remainder VIC	272,135	0.71%	167,214	1.45%	439,348	0.88%
Brisbane	876,922	2.28%	275,998	2.39%	1,152,920	2.30%
Remainder SE QLD	628,634	1.63%	173,648	1.50%	802,282	1.60%
Remainder QLD	80,807	0.21%	22,239	0.19%	103,046	0.21%
SA	43,179	0.11%	11,883	0.10%	55,062	0.11%
WA	26,112	0.07%	7,186	0.06%	33,298	0.07%
TAS	3,661	0.01%	1,008	0.01%	4,669	0.01%
NT	196	0.00%	54	0.00%	250	0.00%
Total Australia 2020	**38,541,509**	**100.00%**	**11,543,729**	**100.00%**	**50,085,238**	**100.00%**
Margin of Error[2]	**±3.07%**	**n/a**	**±7.41%**	**n/a**	**±4.07%**	**n/a**
Total Australia 2018	**45,333,817**	**100.00%**	**14,902,192**	**100.00%**	**60,236,009**	**100.00%**
Margin of Error[2]	**±2.61%**	**n/a**	**±6.64%**	**n/a**	**±3.61%**	**n/a**
Total Australia 2016	**40,103,897**	**100.00%**	**11,558,047**	**100.00%**	**51,661,944**	**100.00%**
Margin of Error[2]	**±2.89%**	**n/a**	**±6.24%**	**n/a**	**±3.64%**	**n/a**
Total Australia 2014	**31,674,661**	**100.00%**	**7,761,387**	**100.00%**	**39,436,048**	**100.00%**
Margin of Error[2]	**±2.84%**	**n/a**	**±7.99%**	**n/a**	**±3.85%**	**n/a**
Total Australia 2012	**28,745,337**	**100.00%**	**6,750,287**	**100.00%**	**35,495,625**	**100.00%**
Margin of Error[2]	**±2.90%**	**n/a**	**±8.02%**	**n/a**	**±3.87%**	**n/a**
Total Australia 2010	**27,262,279**	**100.00%**	**6,581,347**	**100.00%**	**33,843,626**	**100.00%**
Margin of Error[2]	**±3.18%**	**n/a**	**±7.44%**	**n/a**	**±4.00%**	**n/a**
Total Australia 2008	**31,128,875**	**100.00%**	**6,798,741**	**100.00%**	**37,927,616**	**100.00%**
Margin of Error[2]	**±3.34%**	**n/a**	**±4.40%**	**n/a**	**±3.54%**	**n/a**

Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=15,715; 2010 n=15,643; 2012 n=15,646; 2014 n=15,656; 2016 n=15,683, 2018 n=15,644; 2020: NN=15,638

1. Excludes visits by International visitors.
2. Margin of error based on the 95% confidence level for survey regions only.

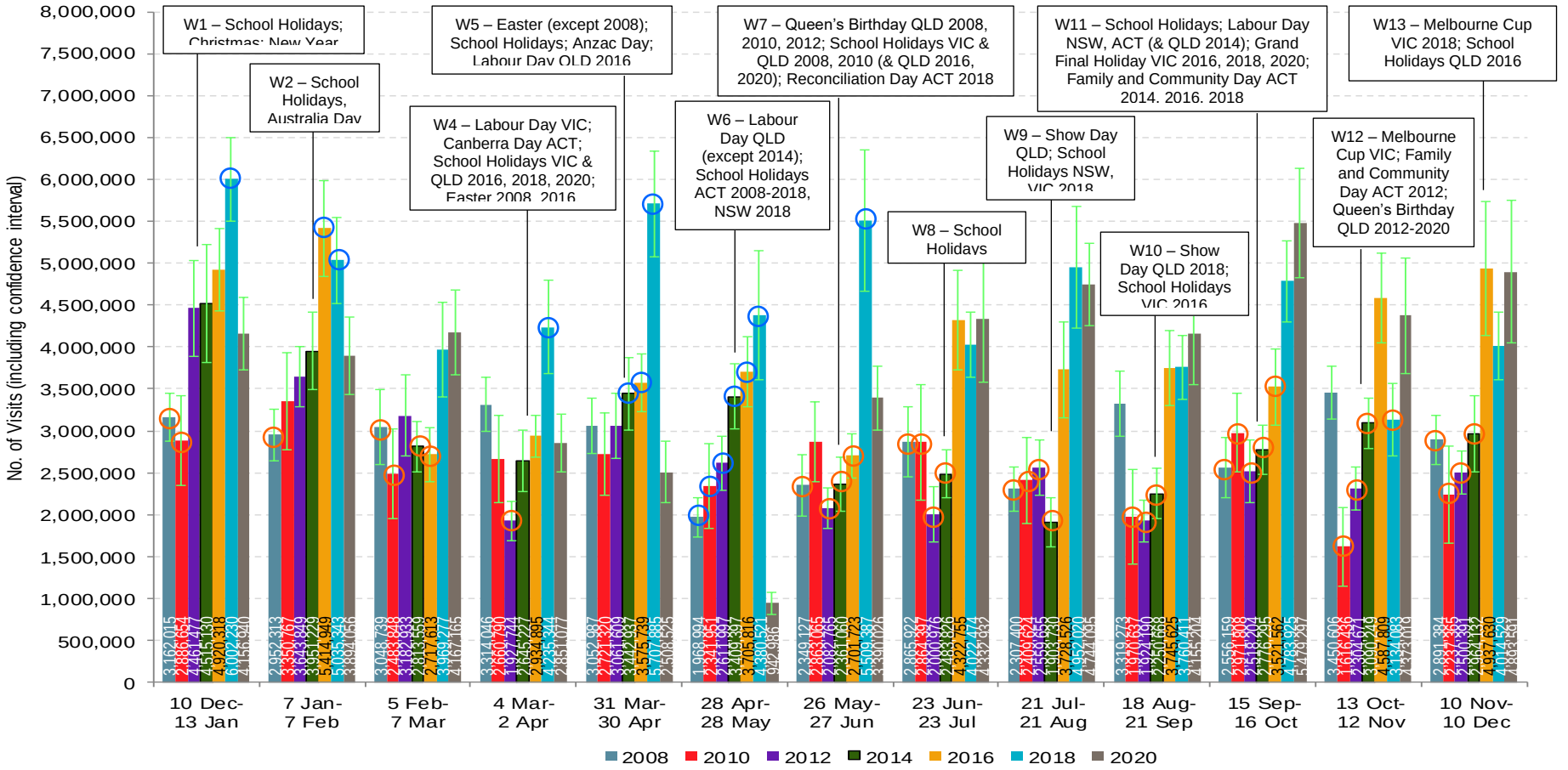
1.3.5 NPWS Park Visitation by Wave

Chart E following shows the seasonality of visitation wave by wave for survey estimates only (as wave by wave visitation for non-survey regions cannot be estimated) and includes the margin of error for each wave.

In general, NPWS park visitation levels in 2020 tend to be significantly lower than 2018 levels from wave 1 to wave 7 (December 2019 to June 2020), with the exception being wave 3 where 2020 visitation is higher (February 2020). Visitation was the lowest ever recorded in waves 5 and 6 (April-May 2020) when COVID-19 restrictions were in full force. The highest ever levels of visits were recorded in 2020 for waves 3 (February), 8 (July), 10 and 11 (mid-August to mid-October), though none were significantly higher than the previous highest year's estimate.

As was the case in previous years, annual and wave by wave NPWS Park visitation patterns are mainly determined by adult visitation patterns. Overall annual child visitation estimate was the second highest on record in 2020 (11.5m visits), with child visits representing 23.1% of all NPWS Park visits. Over time the number of child visits as a proportion of all visits is increasing (18.0% in 2008, 19.4% in 2010, 19.0% in 2012, 19.7% in 2014, 22.4% in 2016 and 24.7% in 2018), but declined marginally in 2020, most likely as a result of COVID-19 restrictions making it more difficult for families with children to visit NPWS parks.

Chart E: Adjusted Annual Visitation Survey Estimate by Wave[8]



Source: NPWS Parks Visitor Surveys 2008 – 2020
Base: 2008 n=15,715; 2010 n=15,643; 2012 n=15,646; 2014 n=15,656; 2016 n=15,683, 2018 n=15,644; 2020 n=15,638

Significantly lower than 2020 estimate
Significantly higher than 2020 estimate

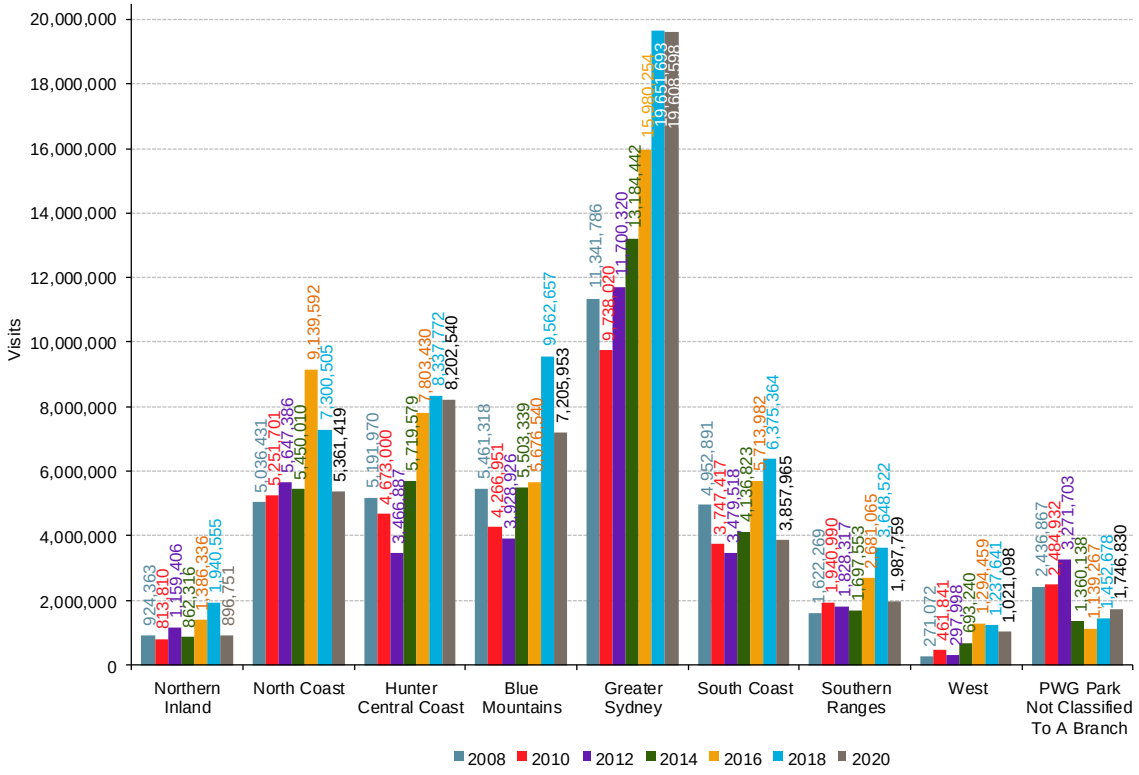
[8] Results provided in the graph only include visitation estimates for regions *surveyed*, so the overall visitation estimate shown above is 37,238,965 for 2008; 33,378,662 for 2010; 34,780,462 for 2012; 38,607,440 for 2014; 50,804,396 for 2016; 59,507,428 for 2018; and 50,085,238 for 2020 (i.e. the additional 688,651 visits in 2008; 464,964 visits in 2010; 715,163 visits in 2012; 559,930 visits in 2014; 857,548 visits in 2016; 728,581visits in 2018; and 196,325 visits in 2020) are estimate for regions of Australia not included in the survey.

1.3.6 NPWS Park Visitation by NPWS Branch

Chart F shows that in 2020, visits to parks declined for all eight Branches. Park visits to Greater Sydney Branch only fell marginally from 2018 to 2020 (from 19.7m to 19.6m), as did visits to the Hunter Central Coast Branch (from 8.3m to 8.2m). Visits to all other Branches in 2020 declined markedly from 2018 levels.

When comparing the proportional contribution to total annual NPWS Park visits by each of the eight NPWS Branches, the contribution to overall visits from parks in the Greater Sydney Branch was most significant, increasing from 33% in 2018 to 39% in 2020 – the highest proportional contribution obtained so far. Increases in proportional contribution to park visits from 2018 to 2020 were also observed for the Hunter Central Coast Branch from 14% to 16%. Proportional contributions declined in 2020 for all other Branches.

Chart F: NPWS Annual Visitation by NPWS Branch[9]



Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=15,715; 2010 n=15,643; 2012 n=15,646; 2014 n=15,656; 2016 n=15,683, 2018 n=15,644; 2020 n=15,638

[9] If respondents could not provide the name of the park they visited, or the name of the park could not be ascertained from the town claimed to be nearest to that park, they were then asked to classify the park as being NPWS managed or not. If they classified the park as being NPWS managed, the park could not be categorised to a NPWS Branch or NPWS Region because the actual location of the park could not be determined. Respondents that were imputed as visiting a NPWS Park also fell into this category.

1.4 Activities Undertaken on Most Recent Park Visit

Respondents who had visited a NPWS Park were asked what activities they undertook on their *most recent* visit. As shown in Table B, in 2020 the top four activities undertaken remained unchanged. Walking activities increased in 2020 to their highest level recorded (68%), most likely due to COVID-19 regulations allowing people to exercise in close proximity to their homes, while water-based recreation (18%) and touring and sightseeing (12%) and picnicking and dining activities (11%) all declined from 2018 levels.

Table B: Top Four Activities Undertaken on Most Recent Park Visits

	2008	2010	2012	2014	2016	2018	2020
Walking	54%	50%	56%	49%	63%	64%	68%
Water-based Recreation	17%	18%	19%	20%	17%	21%	18%
Touring and Sightseeing	12%	10%	9%	13%	13%	14%	12%
Picnicking and Dining	14%	16%	16%	11%	14%	14%	11%

Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582, 2018 n=1,614; 2020 n=1,117

In 2018 and 2020 a new question on walk length was asked for those people who undertook walking, bushwalking or “walking the dog” which is permissible in very few reserves. On average, NPWS visitors tended to walk for a slightly longer time in 2020 than in 2018, with just over one quarter walking for *less than an hour* (28%), significantly lower than the 2018 result (35%). Almost six in ten walkers did so for *up to half a day* (59%), higher than in 2018 (55%%), with 4% walking for *up to one day* and 2% undertaking *multi-day walks*.

1.5 Satisfaction with the Experience of Most Recent Park Visit

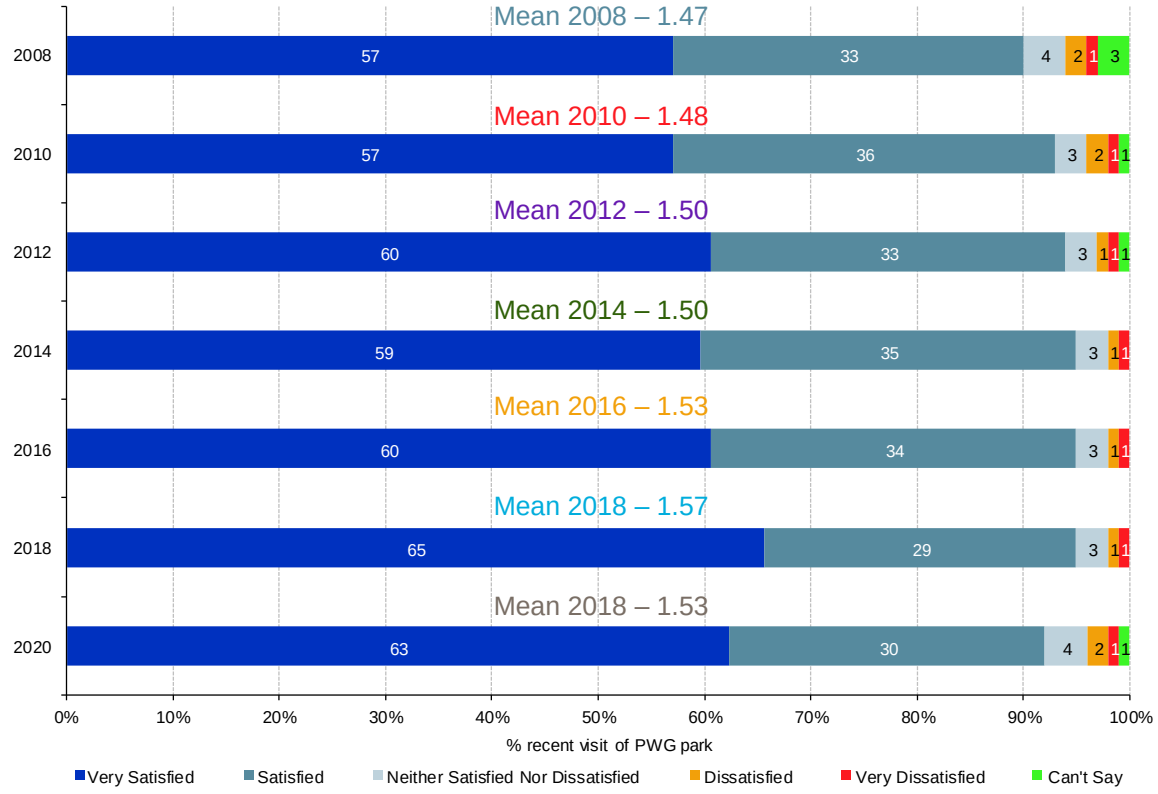
Respondents who had visited a NPWS Park were asked to give an overall satisfaction rating based on the experience of their *most recent visit*. Chart G shows that in both 2008 and 2010, 57% of visitors indicated that they were *very satisfied* with the park experience on their most recent visit, while in 2012 and 2016 that proportion increased to 60%, and dipped slightly to 59% in 2014. In 2018 the proportion *very satisfied* increased to its highest level recorded at 65% while in 2020 the proportion declined slightly to 63%.

In 2008 nine in ten were *at least satisfied* with their park visit (i.e. sum of those satisfied or very satisfied), with the proportion increasing to 93% in 2010 and 2012, and increasing again to 94% from 2014 to 2018, with a slight decline observed to 93% in 2020.

A mean satisfaction score was also calculated for satisfaction with their visit to a NPWS Park (see Section 8.8 for a calculation of the mean). The closer the mean score is to 2 points, the higher the level of satisfaction. As can be seen, in 2008 and 2010 the mean scores were similar at 1.47 and 1.48 respectively, while in 2012 and 2014 scores rose slightly to 1.50. In 2016 the score rose again to 1.53. In 2018, the mean score increased further to 1.57. So satisfaction with one’s most recent

park visit experience is very high and is increasing slowly over time. In 2020 mean satisfaction returned to 2016 levels (1.53)

Chart G: Satisfaction with Experience on Most Recent NPWS Park Visit



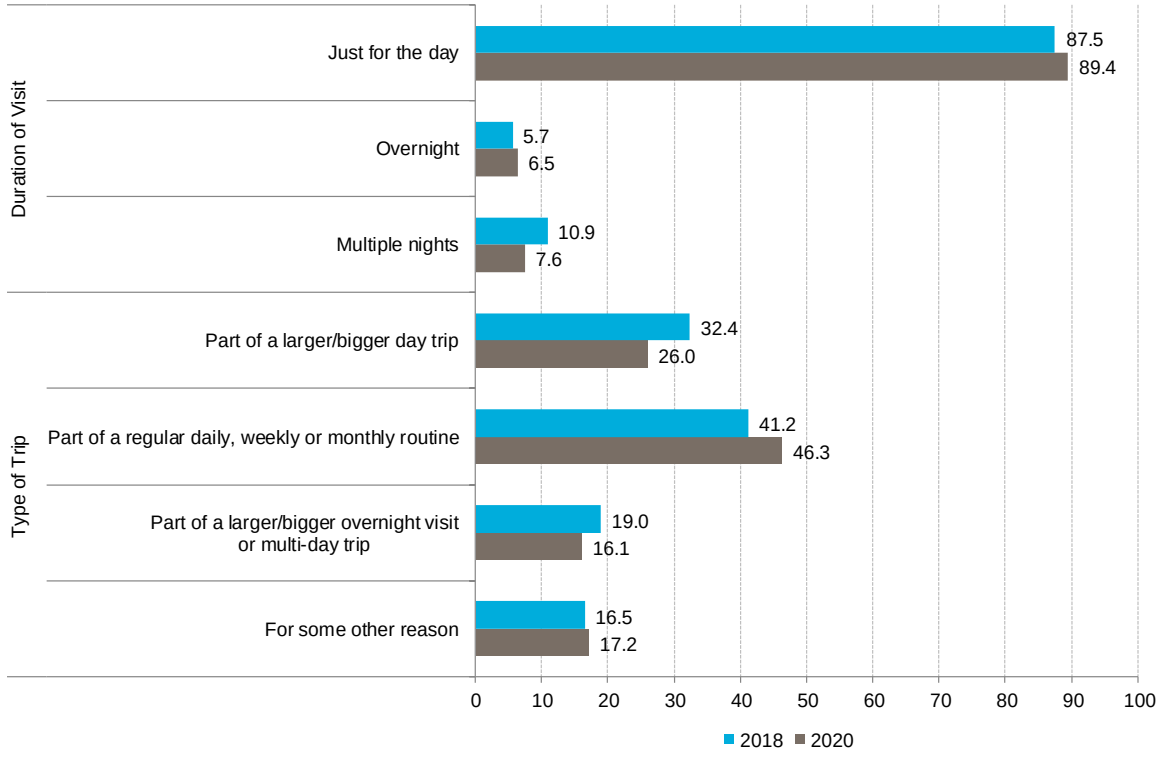
Source: NPWS Parks Visitor Surveys 2008 – 2020
Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582, 2018 n=1,614; 2020 n=1,117

1.6 Duration of Visit and Type of Trip to a NPWS Park

In 2018 and 2020 NPWS park visitors were asked a new question for each different NPWS park they visited in relation to their *duration* of visit. Chart H shows that almost nine in ten visits in both 2018 and 2020 to NPWS parks were *just for the day* (87.5% and 89.4% respectively). One in fifteen visits were *overnight* (5.7% - 2018; 6.5% -2020). A slight decline in visits for *multiple nights* was observed from 2018 to 2020 (from 10.9% to 7.6%).

From 2018 to 2020 there has been significant falls in the proportion of visitors accessing NPWS parks as *part of a larger/bigger day trip* (32% down to 26%) or as *part of a larger/bigger overnight visit or multi-day trip* (19% down to 16%). However, there has been a significant increase in the proportion visiting as *part of a regular daily, weekly or monthly routine* (41% up to 46%). These differences are likely to be due in part to COVID-19 restrictions on activities and distances travelled. One of the legitimate reasons for being out of the house during COVID-19 restrictions was for exercise and a regular exercise routine would most likely result in people visiting NPWS parks close to their home for this purpose.

Chart H: Duration of Visit and Type of Trip to a NPWS Park



Source: NPWS Parks Visitor Surveys 2018-2020
Base: 2018 n=1,741; 2020 n=1,220

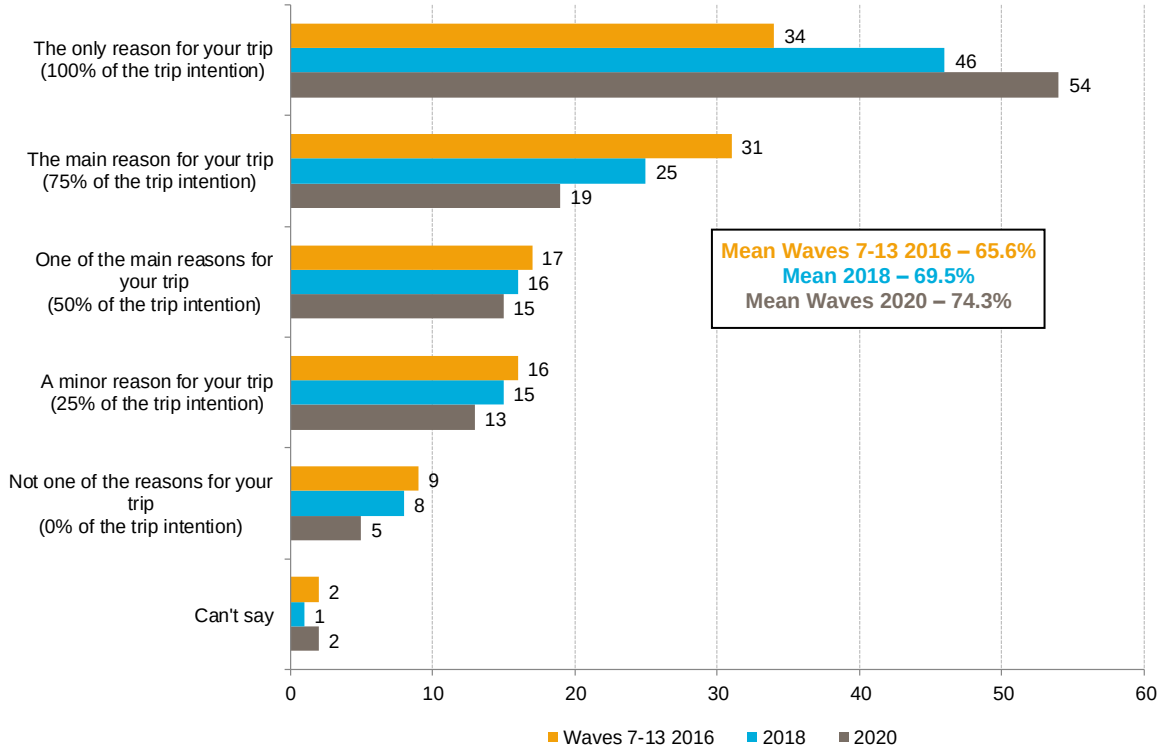
1.7 Role of Park Visit in the Overall Travel Decision

The role of the park visit in one's overall travel decision was first asked in waves 7-13 of the 2016 survey and again in both 2018 and 2020. Chart I shows that over half of NPWS park visitors in 2020 indicated that their *only reason* for their trip was to visit the NPWS park (54%), significantly higher than the result obtained for 2018 (46%) and waves 7-13 in 2016 (34%). It can also be seen that proportions are declining over time for all other roles that the park visit had in terms of intention for one's trip, with 2020 proportions the lowest for the park being the *main reason for one's trip* (19%), *one of the main reasons for one's trip* (15%), *a minor reason for one's trip* (13%) and *not one of the reasons for one's trip* (5%).

The increase in the proportion in 2020 indicating that their NPWS park visit was their *only reason* for their trip is again likely the result of COVID-19 restrictions. The proportion nominating this response was significantly higher in the COVID-19 Affected period in 2020 than in 2018 (60% and 44% respectively), with this disparity also evident in the COVID-19 Rebound period (59% and 47% respectively). This indicates that there may have been a conscious decision to specifically visit an NPWS park when COVID-19 restrictions were in place and that this behaviour continued well after the COVID-19 restrictions were lifted.

Because of the higher proportion nominating their NPWS park visit as their *only reason* for their trip in 2020 than in in previous years, the mean score derived in 2020 was significantly higher than the 2018 and 2016 means (74.3% c.f. 69.5% c.f. 65.6% respectively).

Chart I: Role of NPWS Park Visit in Trip Decision



Source: NPWS Parks Visitor Surveys 2016 – 2020
Base: Wave 7-13 2016 n=849, 2018 n=1,741; 2020 n=1,220

1.8 Park Visitor Needs Base Segmentation

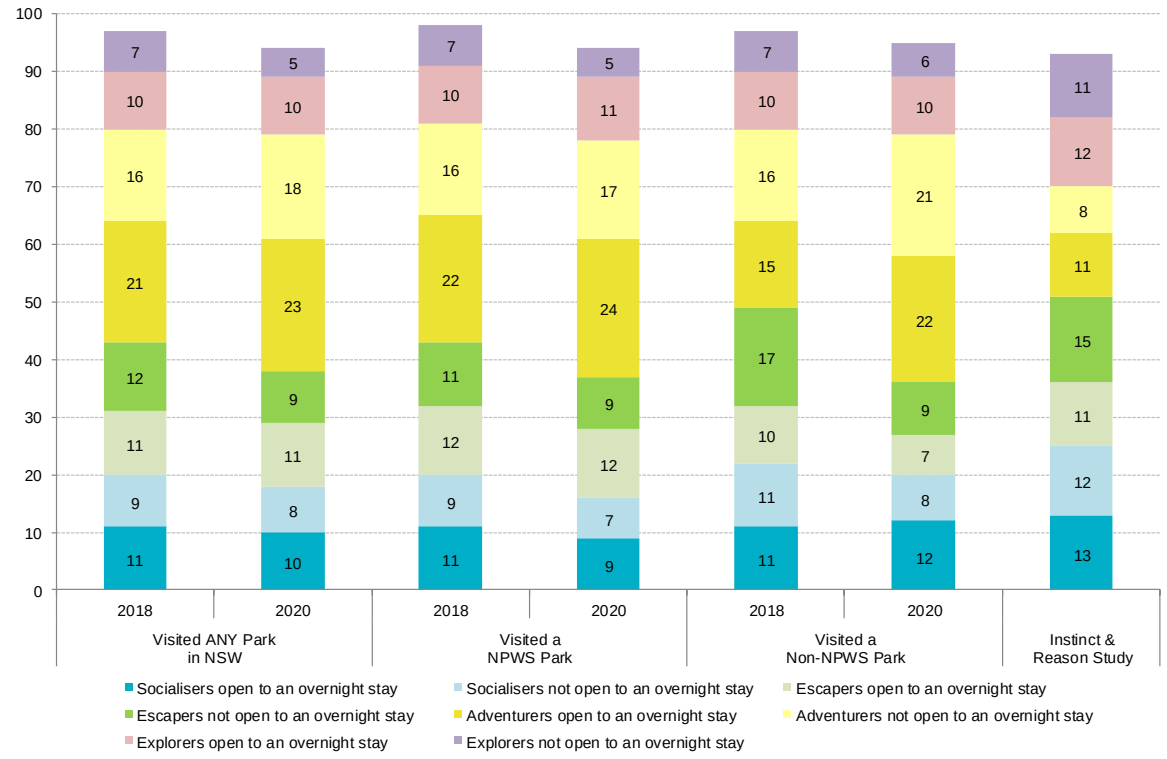
In 2016 the research agency Instinct and Reason undertook a needs-based segmentation for the NPWS. Originally a four-segment model was devised and then enhanced by breaking down the four segments based on whether people were open or not open to an overnight stay in a national park. For the 2018 and 2020 NSW Parks Visitor Surveys, segmentation questions were added to enable a comparison of park visitors with the general population.

Adventurers open to an overnight stay at a NSW National Park have significantly higher proportions amongst NPWS park visitors than in the original segmentation (24% 2020 and 22% 2018 NPWS visitors; 11% Instinct and Reason study). So too are *Adventurers not open* to an overnight stay (17% 2020 and 16% 2018 NPWS; 8% for the Instinct and Reason study), as can be seen in Chart J.

Based on the original segmentation, NPWS park visitors would therefore more likely to be (a) motivated by cultural and educational experiences, wanting family friendly activities; or alternatively

(b) needing parks to deliver experiences that really engage tweens (11-14 year olds) and encourage their parents to take them.

Chart J: Core Sub-segments



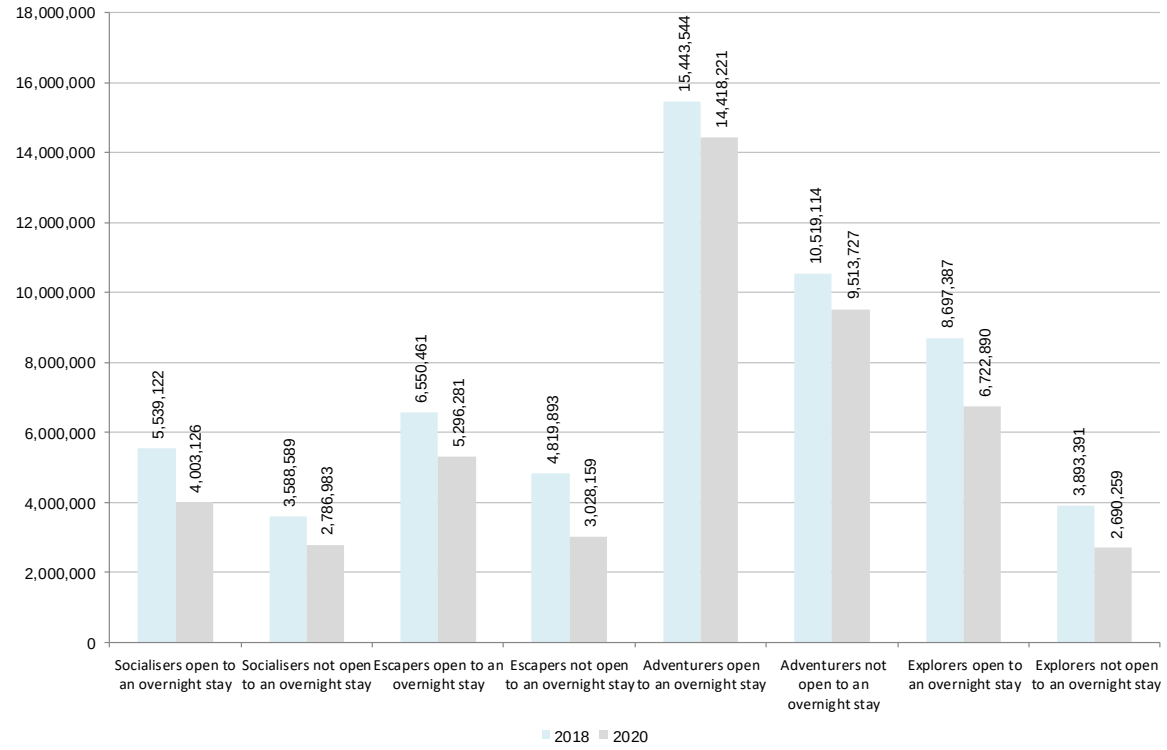
Source: NPWS Parks Visitor Surveys 2018-2020 – Visited a park in NSW in the last 4 weeks; Instinct & Reason Need-based Segmentation
Base: NPWS Parks Visitor Survey 2018 - n=2,094; 2020 - Instinct and Reason Study – n=2,542

As might be expected, given the decline in NPWS visits from 2018 to 2020, the number of visits in each segment declined. *Adventurers open to an overnight stay* contributed the most visits in 2020 (14.4m), down from 15.4m visits in 2018 (Chart K). *Adventurers not open to an overnight stay* contributed the next highest proportion of visits (9.5m), down from 10.5m in 2018. The third most visits in 2020 came from *Explorers open to an overnight stay* (6.7m), down from 8.7m in 2018.

Adventures open to an overnight stay contribute a greater proportion of visits than they represent among visitors. This was evident in both 2018 (22% visitors; 26% visits) and 2020 (24% visitors; 29% visits). *Adventurers not open to an overnight stay* also contribute more to visits than they represent amongst the visitor population in both 2018 (18% visits c.f. 16% visitors) and in 2020 (19% visits c.f. 17% visitors). *Explorers open to an overnight stay* also over-contribute to visits compared with their representation among visitors (14% c.f. 10% in 2018 and 14% c.f. 11% in 2020).

The average number of visits increased for each sub-segment from 2018 to 2020, with the exception of *Explorers both open and not open* to an overnight stay. *Explorers open* to an overnight stay continued to have the highest average number of visits at 3.64 in 2020, followed by *Adventurers open* to an overnight stay (3.40) and *Adventurers not open* to an overnight stay (3.28).

Chart K: NPWS Visits by Sub-Segment



Source: NPWS Parks Visitor Surveys 2018-2020 – Visited a NPWS park in the last 4 weeks
Base: 2018 n=1,687; 2020 n=1,178

2. Introduction

2.1 Background

The Office of Environment and Heritage (OEH), commissioned Roy Morgan to repeat a thirteen wave telephone survey previously conducted in 2008, 2010, 2012, 2014, 2016 and 2018 to monitor and estimate the annual number of visits to NSW parks in 2020. It should be noted that changes in the machinery of NSW Government Agencies came into effect on 1 July 2019. Under these changes the National Parks and Wildlife Service is now a Directorate within the Environment, Energy and Science Group which itself is part of the Department of Planning, Industry and Environment (DPIE).

The National Parks and Wildlife Service (NPWS) Directorate within the Environment, Energy and Science Group has legislative responsibility for ensuring the conservation of protected native flora and fauna within the parks and reserves system and promoting community use, awareness, understanding and appreciation of natural and cultural heritage.

At present there are over 870 parks and reserves in New South Wales for which NPWS has responsibility, covering wilderness areas, national parks, nature reserves, state conservation areas, and regional parks.

NPWS, is responsible for collecting data on visit numbers in order to track park visitation over time. Such an exercise requires an appropriately rigorous and reliable approach to the collection of data on visit numbers. However, until 2008 estimates of the number of visits to parks and reserves managed by NPWS had been determined in an *ad hoc* manner through a mixture of visitor use data provided by individual park managers, direct observations, inferred counts, electronic counters located at only a selection of parks, and intermittent park visitor surveys. In 2007, a pilot study was conducted by Roy Morgan to provide a methodological approach to more precisely measure NPWS park visitation. In 2008, a slightly modified approach from the pilot was used to estimate annual visitation for 2008 and 2010. Since 2012 the methodology was again modified slightly to more accurately estimate NPWS park visitation for 2012, 2014, 2016, 2018 and 2020 and identify any trends in visitation since 2008.

2.2 Objectives of This Study

The main objective of the 2020 study was to provide a *reliable* estimate of annual NPWS park visitation (i.e. the total number of annual visits) for 2020, to be used to compare with results obtained in previous years (i.e. 2008, 2010, 2012, 2014, 2016 and 2018). Additional objectives of this study were to:

1. Use the sampling frame and data collection methodology used in 2012 (i.e. CATI – slightly modified from the 2008 and 2010 approach) to obtain estimates and confidence limits of total visits to NSW Parks and Wildlife Service (NPWS) managed parks in 2020 with a precision similar to that obtained in previous years (i.e. ±4% of the true number);
2. Estimate the proportion of visitors participating in different activities when visiting NPWS parks and compare visits to NPWS managed parks and activities undertaken by different

demographic groups. For 2020, this included analysing visits for those who self-identify as being disabled or caring for someone with a disability;
3. Obtain a measure of overall satisfaction with the NPWS park visit experience;
4. Obtain measures of duration of park visit, type of trip taken when the park visit was made and role of the park visit in the overall decision to travel;
5. Replicate the segmentation exercise undertaken by Instinct and Reason and determine any differences evident amongst park visitors;
6. Compare 2020 survey findings with results from previous years to identify any statistically significant changes; and
7. Identify any potential causes or 'triggers' that influence park visitation.

It must also be noted that 2020 was severely impacted by the bushfires that encompassed NSW in late 2019 and early 2020, which resulted in many parks being closed to the public. Visitation impacts of these closures were exacerbated by the COVID-19 pandemic which arrived in NSW in March 2020, along with its resulting restrictions and lockdowns, which substantially reduced movement until June 2020. These combined events had a significant impact on NPWS park visitation. To better understand these impacts comparisons of NPWS park visitation trends from December 2019 to June 2020 (Waves 1-7 – during bushfires and COVID) and July to December 2020 (Waves 8-13 – post-bushfires and COVID) have been undertaken

The three major research tasks required for the 2020 study were as follows:

1. Conduct a Computer Assisted Telephone Interviewing (CATI) survey with residents aged 18 years and over living in NSW, ACT, Victoria and southern and southeast QLD using a methodology and questionnaire employed in 2012 (and similar to that used in 2008 and 2010 - see section 3.1.1. for changes), to ensure that survey results would be comparable and whatever changes (i.e. minor modifications to the questionnaire, sampling fame etc.) can be tracked over time;
2. Estimate the number of visits to NPWS managed parks for the remainder of Australia (i.e. regions not covered by the CATI survey) using a proxy measure; and
3. Analyse and report on the following:
    - Visitation estimates to NPWS managed parks (i.e. total visits, adult visits, child visits, visits by survey wave and region of origin, visits to each NPWS Branch and Region and average number of visits per visitor) and confidence limits for the overall estimates;
    - Compare visits and visitors by different demographic groups to their proportion of the general population;
    - Estimate the proportion of visitors participating in different activities at the park (for their most recent visit);
    - Compare participation in activities by different demographic groups;
    - Estimate the level of satisfaction with one's most recent park visit;
    - Determine measures of duration of park visit, type of trip taken when the park visit was made and role of the park visit in the overall decision to travel;
    - Report based on an existing segmentation of park visitors;
    - Identify statistically significant differences in number of visits, demographic groups, participation in activities and satisfaction between 2008 and 2020; and
    - Investigate any potential influences on park visitation.

3. Methodology

This study was conducted using Roy Morgan's in-house Computer Assisted Telephone Interviewing (CATI) system over thirteen waves, spaced 4-weeks apart over an entire 12-month period. The first wave commenced on 6 January 2020, with the thirteenth and final wave concluded on 10 December 2020.

In order to be able to compare 2020 data with 2008, 2010, 2012, 2014, 2016 and 2018 results on a wave by wave basis, survey waves for 2020 were scheduled to commence as close as possible to the same week in which waves were conducted in previous years.

3.1 Sample Selection

The sample consists of respondents aged 18 years and over living in:

- Sydney;
- Remainder NSW;
- ACT;
- Melbourne;
- Remainder VIC;
- Brisbane, and;
- Remainder Southern and Southeast QLD.

The seven regions listed above were chosen to be included as in scope for this survey, because their overall share of visits to and within NSW was the highest of all regions based on Roy Morgan Holiday Tracking Survey (HTS) data. Visitation from all other regions of Australia which were not surveyed have had NPWS park visitation estimated using HTS data (See sections 3.2.2 and 5.5 for more detail).

As was the case for the 2008, 2010, 2012, 2014, 2016 and 2018 surveys, 2012 quotas (Table 1) were set each survey wave for age by sex by region so as to be representative of each region's population (based on ABS population estimates for that year). A total of 1,200 interviews were set to be conducted each wave.

Table 1: Quotas Set per Wave

Age by Sex Quotas 2018	Sydney	Rem. NSW	ACT	Melbourne	Rem. VIC	Brisbane	Rem. SE QLD
Male 18-24 years	17	10	12	14	5	11	10
Male 25-34 years	27	14	19	22	8	17	13
Male 35-49 years	33	21	23	26	11	21	17
Male 50+ years	46	52	21	36	25	27	34
Female 18-24 years	16	11	7	13	5	11	5
Female 25-34 years	27	15	14	22	7	16	12
Female 35-49 years	33	22	27	27	12	19	19
Female 50+ years	51	5455	27	40	27	28	40
TOTAL	**250**	**200**	**150**	**200**	**100**	**150**	**150**

Source: ABS: Census Population Estimates 2020

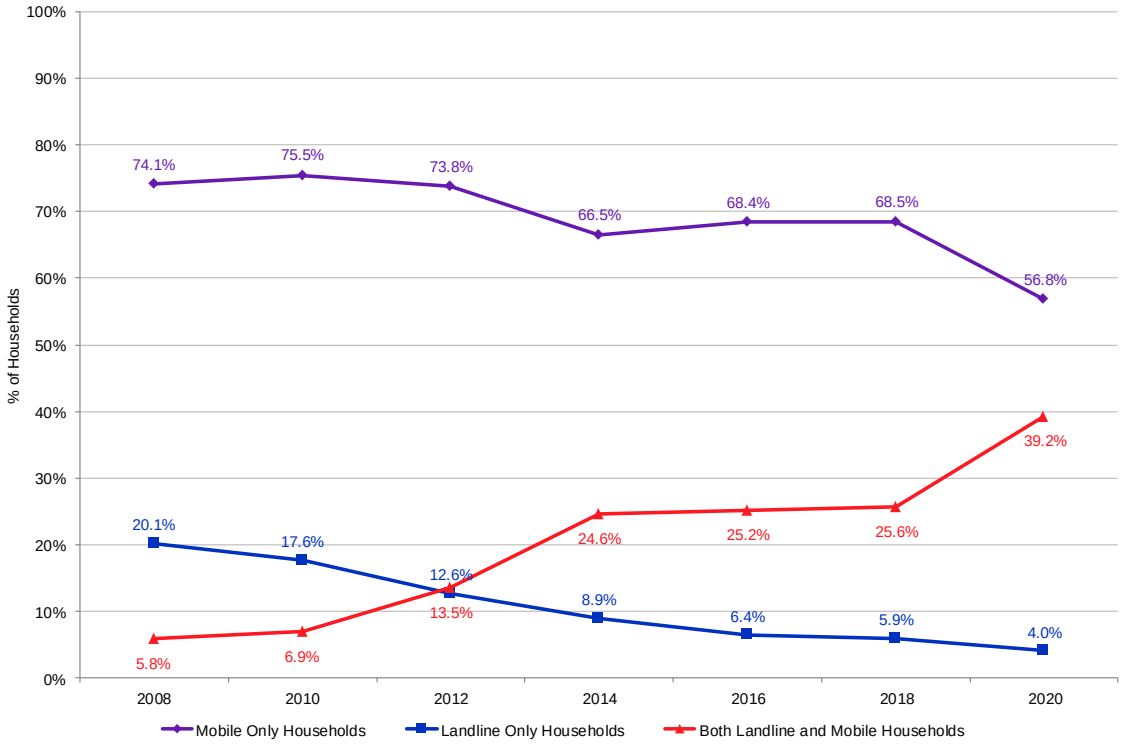
3.1.1 New Sampling Frame Used in 2012, 2014, 2016, 2018 and 2020

For both the 2008 and 2010 surveys, only one respondent from each household was selected for interview, with the respondent's household being randomly drawn from the Electronic White Pages[10] (EWP). In addition, non-business mobile phone sample was also drawn from the EWP in order to include households which may have no landlines.

However, there was a downward trend in response rate for this survey using this sampling approach (17.90% in 2008 and 13.27% in 2010). One of the likely causes of a declining response rate was the currency of the sampling frame used for a survey. The EWP was last released by Sensis for commercial use in 2006. Since that time research agencies have used other sources to update telephone records. Whilst every effort is made to keep phone lists as up to date as possible, it is evident that the proportion of new phone telephone numbers being included in the EWP sample frame is declining compared with the proportion actually being generated by telephone companies.

In addition, the method of communicating by telephone across the world is changing rapidly. Households and individuals have the choice of fixed landlines, mobile phones and broadband internet-based telecommunication services (e.g. Skype, VoIP, and Google Voice etc.). Chart 1 shows that 39.2% of the households in the survey area come from solely mobile households in 2020 (i.e. no fixed landlines). A small proportion of these numbers are listed in the White Pages.

Chart 1: Phone Status by Year – Survey Area



Source: Roy Morgan Single Source – Proportion of households in the Survey area

[10] The term Electronic White Pages (EWP) relates to Telstra's list of Australian residential phone numbers, known as Australia on Disc, last released in July 2004. In June 2006, the last formal release of this information was provided from Local List Australia. Since this time research organisations have used a number of sources to keep the EWP updated. Roy Morgan Research has updated EWP lists from the following sources – August 2007: Prospect Marketing Pty Ltd (5.7m records); September 2009: Grey Pages (entire white pages listing); and May 2009: Prospect Marketing Pty Ltd (1.1m new records).

It has been clear for some time that the use of phone listings for sampling purposes has become increasingly inefficient, as it excludes a significant proportion of households which are simply not listed.

As a result, the sampling frame for all surveys from 2012 changed to a Random Digit Dialling (RDD) approach where all telephone numbers have an equal chance of being selected (including silent numbers and mobile only households). Such an approach ensures that newer listings are more appropriately represented in the final sample.

RDD sampling was used to sample both landline and mobile numbers as such an approach included the broadest cross-section of the population as possible in the sample frame, including households with silent numbers, new numbers not yet recorded in phone listings, solely mobile phone households with no landline number, as well as households with their telephone service provided via broadband internet (which uses a portable but standard telephone number, generally a landline number, but sometimes a mobile number).

In 2008 and 2010, approximately 12% of phone numbers called were mobile numbers. In 2012, using RDD and in an attempt to obtain a sufficiently large proportion of mobile only households (in order to appropriately weight the data by phone status) around 22% of all calls were made to mobile numbers. In 2014, the proportion of mobile numbers called increased to 23%. However, the overall response rate fell from 14.6% in 2012 to 12.6% in 2014, while response rates for mobile numbers called remained comparable (19.2% - 2012; 18.5% - 2014). Hence the response rate for landline numbers fell from 2012 to 2014 (from 13.5% to 11.1%).

It was therefore agreed between Roy Morgan and the NPWS to increase the proportion of mobiles called in 2016 in order to (1) increase the overall response rate (which it did – up to 18.1% in 2016); and (2) to ensure that the proportion of mobile only households *surveyed* was more in line with survey area household population (which it was – 22.3% survey sample: 21.3% survey area household population). The proportion of mobile phone numbers called in 2018 was again designed as per the 2016 agreement, with the proportion of mobile only households surveyed being 29.3% compared with the proportion of survey area households at 25.6%. Therefore, in 2018 a slight over-sample of mobile only households was delivered even though far fewer mobile numbers were called in 2018 compared with 2016 (39.6% - 2018: 53.3% - 2016). This essentially means that over time the incidence of obtaining interviews from landline numbers is declining, while the incidence of obtaining interviews from mobile numbers is increasing). For 2020 a total of 53.3% of numbers were called on a landline, with 38.9% of those surveyed coming from mobile only households (in line with the proportion of mobile only households in 2020 – 39.2%).

As moving to RDD was a departure from the survey methodology used in 2008 and 2010 there was some potential that the sample surveyed would differ slightly in its characteristics from the EWP sample. As a result, three questions were included at the start of the questionnaire to allow for identification and calibration for any diversion from 2008 and 2010 samples:

If mobile phone number called: Q: *Do you live in a home that also has a landline telephone?*

This was used to determine whether respondents called on mobile phones had a significantly greater probability of being selected for the survey because they also had a landline (i.e. if they had

both a landline and a mobile phone they had a slightly greater chance of being selected than someone with a mobile only or a landline only).

If landline number called: Q: *Do you personally have a mobile phone?*

Similarly, this was used to determine whether respondents called on landlines had a significantly greater probability of being selected for the survey because they also had a mobile phone.

All phone numbers called: Q: *How many people, including yourself, live in your household?*

As there was already a question on the number of children in the household, the above question, in conjunction with the existing question on the number of children, allowed for calculation of the number of people in the household eligible to be selected for the survey (i.e. people aged 18 years and over).

In order to optimise the representativeness of the sample, respondents were called on different days and at different times of day. Appointments were made when the eligible respondent was unavailable at the time of call, thereby allowing them to be interviewed at a more suitable time.

3.1.2 Survey Waves

Interviews were conducted every four weeks starting with wave 1 of the 2020 survey commencing on January 6, 2020, with the survey asking for visitation to parks within the *preceding* 4 weeks. Consequently, park visitation figures for each wave fluctuate depending on the types of events that have occurred in the 4 weeks prior to the survey. Such events include public holidays and school holidays, as well as the seasons, region specific weather conditions, activities specific to a region at a particular time of year (e.g. snow skiing) and one-off events (such as festivals in and around towns near NPWS managed parks).

In order to understand some of the possible reasons why visitation to NPWS parks fluctuate each wave, Table 2 outlines the dates of interviewing for survey waves 1-13 in all previous survey years, the time period each survey wave relates to for visitation, along with the corresponding school holidays and public holidays occurring within each visitation period for each state surveyed. It also includes the visitation estimate for each survey wave[11], in total and by state of respondent origin.

Please note that all holiday periods listed for 2020 correspond to the same holiday periods in previous years, with the following exceptions:

- Easter fell in wave 4 in 2008 compared to wave 5 in 2010, 2012, 2014 and 2020, while Easter spanned both waves 4 and 5 in 2016 and 2018;
- April school holidays in spanned wave 4 and wave 5 in VIC and SE QLD in 2016 and 2018, and spanned wave 5 and wave 6 in ACT in 2016;
- June school holidays in VIC and SE QLD fell across waves 7 and 8 in 2008, 2010, but only one wave in 2012 and 2014. In 2016 the June school holidays fell across waves 7 and 8 in SE QLD only. In 2018 the June school holidays fell across waves 8 and 9 for NSW and ACT and waves 7 and 8 for ACT in 2020;

[11] The visitation estimate does not include visits from non-surveyed states or regions within states.

- In 2012 QLD moved the Queen's Birthday public holiday to October in perpetuity. However, in order to not disrupt business planning, the June Queen's Birthday holiday was also retained in 2012 (i.e. two Queen's Birthday holidays in the same year - 2012);
- In 2018 the QLD Show Day spanned both waves 9 and 10;
- Labour Day in QLD was shifted from May to October from 2013-2015 (so fell in wave 11 in 2014), and was then moved back to May in 2016, where is panned both waves 5 and 6;
- In 2018 the VIC Melbourne Cup Holiday spanned both waves 12 and 13;
- In 2016 the December school holidays in QLD started in Wave 13; and
- The ACT introduced a Family & Community Day public holiday in 2011 with it falling in wave 12 in 2012 and wave 11 in 2014 and 2016. This holiday was replaced by a Reconciliation Day public holiday in 2018, which fell in wave 7.

Where analysis by survey wave has been presented in this report, visitation data for each wave in 2012 and 2008 has been transposed to correlate to the same visitation period in the 2010, 2014, 2106, 2018 and 2020 surveys. This is because the 2010, 2014, 2016, 2018 and 2020 survey waves correspond to the calendar year, while the visitation period commences at the beginning of summer for 2009-10, 2013-14, 2015-16 and 2017-18 making analysis by season and time of the year more easily understandable.

Table 2: Survey Waves and School/Holiday Incidence - Summary

2019-20							Corresponding Wave					
Wave	Visitation Period[1]	Survey Period[2]	NSW	VIC	ACT	SEQLD	2008 -2009	2009 -2010	2012 -2013	2013 -2014	2015-2016	2017-2018
Wave 1	10 Dec 2019 - 13 Jan 2020	6 Jan- 13 Jan 2020	School Holidays Christmas Boxing Day New Year	School Holidays Christmas Boxing Day New Year	School Holidays Christmas Boxing Day New Year	School Holidays Christmas Boxing Day New Year	Wave 12	Wave 1	Wave 11	Wave 1	Wave 1	Wave 1
	2020 Visits	***5,538,561***	***4,879,721***	***73,159***	***20,002***	***565,679***						
	2018 Visits	*6,002,230*	*2,951,505*	*1,452,421*	*464,433*	*1,133,870*						
	2016 Visits	*4,920,318*	*3,835,001*	*632,578*	*54,994*	*397,744*						
	2014 Visits	4,515,130	4,237,099	128,001	39,916	110,114						
	2012 Visits	4,461,477	3,991,312	197,507	34,793	237,864						
	2010 Visits	2,886,656	2,515,828	86,190	107,422	177,215						
	2008 Visits	3,162,016	2,931,585	78,364	56,379	95,689						
Wave 2	7 Jan- 7 Feb 2020	3 Feb- 7 Feb 2020	School Holidays Australia Day	School Holidays Australia Day	School Holidays Australia Day	School Holidays Australia Day	Wave 13	Wave 2	Wave 12	Wave 2	Wave 2	Wave 2
	2020 Visits	***4,989,406***	***4,527,263***	***184,596***	***117,046***	***160,300***						
	2018 Visits	*5,035,343*	*4,220,736*	*406,304*	*107,335*	*300,967*						
	2016 Visits	*5,414,949*	*4,670,389*	*433,251*	*96,440*	*214,869*						
	2014 Visits	3,951,229	3,580,875	58,848	74,985	236,522						
	2012 Visits	3,643,852	3,077,049	403,824	103,744	59,235						
	2010 Visits	3,350,768	2,884,780	203,400	115,737	146,851						
	2008 Visits	2,952,311	2,640,258	155,992	60,289	95,772						
Wave 3	5 Feb- 7 Mar 2020	3 Mar- 7 Mar 2020					Wave 1	Wave 3	Wave 13	Wave 3	Wave 3	Wave 3
	2020 Visits	***3,629,270***	***3,451,192***	***84,919***	***31,552***	***61,607***						
	2018 Visits	*3,969,277*	*3,791,777*	*42,296*	*42,720*	*92,483*						
	2016 Visits	*2,717,613*	*2,495,693*	*91,463*	*38,438*	*92,019*						
	2014 Visits	2,813,559	2,631,359	62,289	38,274	81,637						
	2012 Visits	3,182,932	2,943,245	80,831	33,931	124,925						
	2010 Visits	2,483,849	2,314,423	45,195	73,429	50,803						
	2008 Visits	3,048,740	2,933,436	40,789	35,541	38,974						

Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=15,715; 2010 n=15,643; 2012 n=15,646; 2014 n=15,656; 2016 n=15,683, 2018 n=15,644; 2020 n=15,638

1. The period in which a respondent could have visited a park within the last 4 weeks in each survey wave.
2. The period in which interviews were conducted.

Table 2: Survey Waves and School/Holiday Incidence - Summary (continued)

2019-20							Corresponding Wave					
Wave	Visitation Period[1]	Survey Period[2]	NSW	VIC	ACT	SE QLD	2008 -2009	2009 -2010	2012 -2013	2013 -2014	2015- 2016	2017- 2018
Wave 4	4 Mar- 2 Apr 2020	31 Mar- 2 Apr 2020	Easter 2008, 2016, 2018	School Holidays 2016, 18 & 20 Labour Day Easter 2008, 2016, 2018	Canberra Day Easter 2008, 2016, 2018	School Holidays 2016, 2018 Easter 2008, 2016, 2018	Wave 2	Wave 4	Wave 1	Wave 4	Wave 4	Wave 4
	2020 Visits	***3,563,535***	***3,224,799***	***123,137***	***50,966***	***164,633***						
	2018 Visits	*4,235,344*	*3,699,292*	*438,554*	*17,969*	*79,529*						
	2016 Visits	*2,934,895*	*2,552,565*	*234,963*	*28,329*	*119,038*						
	2014 Visits	2,645,227	2,354,217	158,142	41,312	91,556						
	2012 Visits	1,927,744	1,724,902	166,735	16,082	20,025						
	2010 Visits	2,660,791	2,593,867	0	29,246	37,677						
	2008 Visits	3,314,045	3,052,525	124,376	40,635	96,509						
Wave 5	31 Mar- 30 Apr 2020	27 Apr- 30 Apr 2020	Easter 2010, 12, 14, 16, 18, 20 School Holidays 2008-2020 Anzac Day	Easter 2010, 12, 14, 16, 18, 20 School Holidays 2008-2020 Anzac Day	Easter 2010, 12, 14, 16, 18, 20 School Holidays 2008-2020 Anzac Day	Easter 2010, 12, 14, 16, 18, 20 School Holidays 2008-2020 Labour Day 2016 Anzac Day	Wave 3	Wave 5	Wave 2	Wave 5	Wave 5	Wave 5
	2020 Visits	***4,542,986***	***4,532,888***	***0***	***10,098***	***0***						
	2018 Visits	*5,707,885*	*5,457,700*	*167,063*	*21,626*	*61,496*						
	2016 Visits	*3,575,739*	*3,251,048*	*155,204*	*74,886*	*94,600*						
	2014 Visits	3,442,937	3,042,305	238,017	54,307	108,308						
	2012 Visits	3,061,608	2,805,767	46,555	38,461	170,825						
	2010 Visits	2,721,320	2,400,637	111,906	57,809	150,967						
	2008 Visits	3,052,988	2,781,709	31,309	88,393	151,577						
Wave 6	28 Apr- 28 May 2020	25 May- 28 May 2020	School Holidays 2018		School Holidays 2008-2018	Labour Day 2008, 2010, 2012, 2016, 2018, 2020	Wave 4	Wave 6	Wave 3	Wave 6	Wave 6	Wave 6
	2020 Visits	***3,212,955***	***2,854,078***	***0***	***358,877***	***0***						
	2018 Visits	*4,380,521*	*4,183,200*	*82,659*	*33,319*	*81,343*						
	2016 Visits	*3,705,816*	*3,590,963*	*7,456*	*59,024*	*48,373*						
	2014 Visits	3,409,397	3,232,670	53,608	76,650	46,469						
	2012 Visits	2,611,996	2,467,454	53,903	32,098	58,541						
	2010 Visits	2,341,952	2,201,851	23,961	60,276	55,864						
	2008 Visits	1,968,994	1,761,724	58,192	76,419	72,659						
Wave 7	26 May- 27 Jun 2020	22 Jun- 27 Jun 2020	Queen's B'day	Queen's B'day School Holidays 2008, 2010 & 2020	Queen's B'day School Holidays 2020 Reconcilliation Day 2018	Queen's B'day 2008, 2010 & 2012 School Holidays 2008, 2010, 2016, 2020	Wave 5	Wave 7	Wave 4	Wave 7	Wave 7	Wave 7
	2020 Visits	***4,684,108***	***4,412,954***	***108,429***	***65,307***	***97,419***						
	2018 Visits	*5,509,387*	*5,258,627*	*100,757*	*36,977*	*113,026*						
	2016 Visits	*2,701,723*	*2,245,699*	*301,278*	*30,609*	*124,136*						
	2014 Visits	2,361,060	2,201,009	85,100	51,061	23,889						
	2012 Visits	2,082,765	1,953,047	82,411	36,971	10,336						
	2010 Visits	2,863,064	2,457,645	114,768	74,755	215,897						
	2008 Visits	2,349,128	2,197,567	40,655	48,525	62,381						
Wave 8	23 Jun- 23 Jul 2020	20 Jul- 23 Jul 2020	School Holidays 2008-2020	School Holidays 2008-2020	School Holidays 2008-2020	School Holidays 2008-2020	Wave 6	Wave 8	Wave 5	Wave 8	Wave 8	Wave 8
	2020 Visits	***4,462,308***	***4,113,919***	***120,670***	***104,789***	***122,931***						
	2018 Visits	*4,022,474*	*3,808,886*	*94,150*	*23,849*	*95,588*						
	2016 Visits	*4,322,755*	*4,084,236*	*34,302*	*56,640*	*147,577*						
	2014 Visits	2,483,826	2,277,874	22,309	94,739	88,903						
	2012 Visits	2,000,977	1,792,581	126,447	43,560	38,388						
	2010 Visits	2,864,397	2,681,238	30,688	39,887	112,583						
	2008 Visits	2,865,917	2,431,012	296,936	59,324	78,645						

Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=15,715; 2010 n=15,643; 2012 n=15,646; 2014 n=15,656; 2016 n=15,683, 2018 n=15,644; 2020 n=15,638

1. The period in which a respondent could have visited a park within the last 4 weeks in each survey wave.
2. The period in which interviews were conducted.

Table 2: Survey Waves and School/Holiday Incidence – Summary (continued)

2019-20							Corresponding Wave					
Wave	Visitation Period[1]	Survey Period[2]	NSW	VIC	ACT	SE QLD	2008 -2009	2009 -2010	2012 -2013	2013 -2014	2015-2016	2017-2018
Wave 9	21 Jul-21 Aug 2020	17 Aug-21 Aug 2020	School Holidays 2018		School Holidays 2018	Show Day 2008-2020	Wave 7	Wave 9	Wave 6	Wave 9	Wave 9	Wave 9
	2020 Visits	***4,459,357***	***4,438,220***	***0***	***21,137***	***0***						
	2018 Visits	*4,952,020*	*4,818,099*	*69,639*	*48,202*	*16,080*						
	2016 Visits	*3,728,526*	*3,403,226*	*145,746*	*72,976*	*106,577*						
	2014 Visits	1,903,730	1,581,501	19,618	28,951	273,659						
	2012 Visits	2,559,654	2,437,717	14,841	47,908	59,187						
	2010 Visits	2,409,625	2,170,757	9,576	70,440	158,852						
	2008 Visits	2,307,400	2,096,677	59,931	77,943	72,850						
Wave 10	18 Aug-21 Sep 2020	14 Sep-21 Sep 2020		School Holidays 2016		Show Day 2018	Wave 8	Wave 10	Wave 7	Wave 10	Wave 10	Wave 10
	2020 Visits	***4,206,963***	***4,155,788***	***0***	***51,175***	***0***						
	2018 Visits	*3,760,411*	*3,399,505*	*206,233*	*51,778*	*102,895*						
	2016 Visits	*3,745,625*	*3,548,257*	*98,289*	*51,778*	*55,084*						
	2014 Visits	2,250,668	2,078,805	76,250	37,972	58,361						
	2012 Visits	1,924,190	1,808,195	21,133	54,635	40,227						
	2010 Visits	1,970,636	1,766,194	74,264	18,874	111,305						
	2008 Visits	3,319,275	3,221,417	26,999	25,959	44,900						
Wave 11	15 Sep-16 Oct 2020	12 Oct-16 Oct 2020	School Holidays 2008-2020 Labour Day	School Holidays 2008-2020 Grand Final Holiday 2016, 2018	School Holidays 2008-2020 Labour Day Family & Community Day 2014, 2016, 2018	School Holidays 2008-2020	Wave 9	Wave 11	Wave 8	Wave 11	Wave 11	Wave 11
	2020 Visits	***4,876,608***	***4,720,456***	***0***	***96,930***	***59,222***						
	2018 Visits	*4,783,925*	*4,140,414*	*164,292*	*44,527*	*434,692*						
	2016 Visits	*3,521,562*	*2,564,891*	*414,086*	*71,557*	*471,027*						
	2014 Visits	2,776,295	2,624,740	77,746	20,043	53,766						
	2012 Visits	2,518,205	2,132,019	32,604	83,729	269,854						
	2010 Visits	2,971,805	2,479,893	128,132	33,646	330,134						
	2008 Visits	2,556,159	2,362,309	75,059	21,773	97,017						
Wave 12	13 Oct-12 Nov 2020	9 Nov-12 Nov 2020	School Holidays 2018	Grand Final Holiday 2020, Melbourne Cup	School Holidays 2018 Family & Community Day 2012	Queen's Birthday 2012, 2014, 2016, 2018, 2020	Wave 10	Wave 12	Wave 9	Wave 12	Wave 12	Wave 12
	2020 Visits	***3,542,493***	***3,435,306***	***78,113***	***17,314***	***11,759***						
	2018 Visits	*3,134,083*	*2,990,889*	*49,109*	*18,113*	*75,972*						
	2016 Visits	*4,587,809*	*4,406,104*	*28,056*	*36,231*	*117,418*						
	2014 Visits	3,090,249	2,776,695	208,509	15,890	89,156						
	2012 Visits	2,304,671	2,058,586	106,083	20,887	119,116						
	2010 Visits	1,616,435	1,423,101	65,160	25,582	102,592						
	2008 Visits	3,450,607	3,318,437	52,402	42,193	37,576						
Wave 13	10 Nov-10 Dec 2020	7 Dec-10 Dec 2020		Melbourne Cup		School Holidays 2016	Wave 11	Wave 13	Wave 10	Wave 13	Wave 13	Wave 13
	2020 Visits	***4,591,486***	***4,472,273***	***17,958***	***55,412***	***45,843***						
	2018 Visits	*4,014,529*	*3,820,034*	*123,920*	*35,382*	*35,193*						
	2016 Visits	*4,937,630*	*4,623,419*	*165,698*	*15,013*	*133,500*						
	2014 Visits	2,964,132	2,839,488	34,378	18,800	71,466						
	2012 Visits	2,500,392	2,253,692	81,605	90,044	75,051						
	2010 Visits	2,237,365	1,982,127	163,833	29,724	61,681						
	2008 Visits	2,891,383	2,696,525	140,552	21,404	32,903						

Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=15,715; 2010 n=15,643; 2012 n=15,646; 2014 n=15,656; 2016 n=15,683, 2018 n=15,644; 2020 n=15,638

1. The period in which a respondent could have visited a park within the last 4 weeks in each survey wave.
2. The period in which interviews were conducted.

3.2 Questionnaire Design

As the key objective of the survey was to estimate NSW NPWS Managed Park visitation from the Australian population, the questionnaire was designed to effectively and accurately record visitation to parks from both interstate respondents and those living in NSW.

3.2.1 Park Visitation Questions

In order to correctly ascertain whether the park visited was NPWS managed, and therefore in scope, an extensive series of questions which allowed for clarification and verification of responses was included. Explanations of the survey questions follow below.

To estimate NPWS Park visitation, the questionnaire captures the NPWS Park most recently visited, and if more than one NPWS Park was visited during the recall period, up to a further four NPWS Parks. All parks nominated are based on visitation *within the four weeks prior to interviewing*. The reasons why past 4 week recall was used are as follows:

- Clarity of recall is sharper the shorter the recall period, thereby improving the quality of the visitation estimate. Balancing recall length with the ability to create a continuous 12-month visitation period, based on the number of survey waves that could be feasibly conducted in a year. This resulted in 13 waves with a recall period of 4 weeks for each wave;
- Other Australian park visitation surveys use this time period (e.g. the Victorian Parks Visitation Number Monitor), which allows for comparison of estimates between surveys; and
- So that estimation of visits from non-surveyed areas could be easily calculated without having to create a complex algorithm to recalibrate the visitation time period, a comparable time period to that used in the Roy Morgan Holiday Tracking Survey was employed.

3.2.2 Qualifying Questions and HTS

Prior to asking specifically about visitation to NSW NPWS Parks, two questions were asked about interstate travel to NSW. These questions were taken from the Roy Morgan Holiday Tracking Survey (HTS), and were used (post field) as a means of linking datasets produced from this survey to the HTS datasets to enable projection of visitation to NSW NPWS Parks from other regions not included in the sample (such as remainder QLD, NT, SA, TAS and WA). Please note that this question was asked of all survey participants, including those residing in NSW, in order to capture the proportion of NSW residents taking a holiday away from their usual place of residence within their home state.

QHTS1: *Thinking back over the last 12 months to your MOST RECENT HOLIDAY of one or more nights away from home, was the holiday in…*

1. *New South Wales*
2. *Another Australian State or Territory*
3. *Overseas*

QHTS2: *Was that holiday in the last 4 weeks?*
IF NECESSARY, SAY: *That is, SINCE [Date 28 days ago]?*

All respondents who were not residents of NSW were asked a further qualifying question:

> **QTRAVEL:** *Have you visited New South Wales within the last 4 weeks?*

This allowed calculation of visitation to NSW from interstate respondents travelling on day trips (i.e. travelled to NSW in the last 4 weeks, but did not stay overnight). Obtaining such data allowed for a more precise estimation of NPWS Park visitation from non-surveyed regions to be calculated. Interstate respondents who had not visited NSW within the last four weeks were considered out of scope for the remainder of the survey and therefore the interview was concluded at this point.

Qualifying respondents were then asked if they had visited parks in NSW within the last 4 weeks.

> **QPARK:** *Thinking about PARKS anywhere at all in New South Wales, including the city or suburbs of Sydney, have you visited any parks WITHIN THE LAST 4 WEEKS, that is, SINCE {Date 28 days ago]? By parks, I mean National Parks, State Conservation Areas, Nature Reserves, State Forests, or any other type of park. I DON'T mean botanical gardens, zoos, wildlife parks, or any local council parks.*

This was the key question which determined whether the respondent would proceed through the rest of the questionnaire. Whilst this question obtains visits to parks that are outside the scope of the survey (i.e. non-NPWS Managed Parks), findings from the survey pilot conducted in September-October 2007 showed that a significant proportion of respondents were not aware of the *type* of park they visited. By broadening the scope of this key question to include other parks and using subsequent clarifying questions designed to precisely determine the type of park visited and hence those that visited a NPWS Managed Park we minimised the potential for missing relevant park visits. This process is discussed further in the following sections.

3.2.3 Naming the Park Visited

Respondents were asked the name of the park they had most recently visited in NSW. It was at this point of the survey that the type of park (NPWS Managed or non-NPWS Managed) was established.

As the 2007 pilot survey indicated that people were sometimes unable to correctly distinguish between a NPWS managed or non-NPWS managed park, the survey was programmed in such a way so as to record as much detail as possible to minimise respondent error. This was done through the provision (by the NPWS) of comprehensive 'look-up' tables that listed:

- All NPWS Managed Parks and all known aliases used for each park;
- Non-NPWS Parks including State Forests (and their associated aliases); and
- Names of parks which could be either NPWS Managed or non-NPWS Managed.

Programming the survey in such detail allowed for incorrect nominations of a NPWS Park or non-NPWS Park to be flagged at the time of interviewing, rather than post-field, in order assign the correct park type at the time of interview (i.e. as soon as the park could be identified as NPWS managed, questions on the number of visits could be asked). It also took into consideration, not only the *official* name of the NPWS Park, but also any aliases, locality names or 'nick names' assigned to the park by locals.

As a number of NPWS managed parks and State Forests (non-NPWS managed) share the same name, a check question was added to determine the correct park type. Respondents were asked if

they knew specifically whether it was a NPWS Park (i.e. a National Park, State Conservation Area or Nature Reserve etc.) or a State Forest. This further assisted in assigning the correct park type at the time of interviewing, assisted post-field cleaning, and minimised the amount of data cleaning required post-field.

As another means of capturing the most accurate data at the time of interview (thus minimising post field cleaning), the survey was programmed to assist respondents who were *unsure* about a park name. This was achieved by programming a comprehensive list of all geographical locations (towns/suburbs/localities etc.) surrounding each park into the survey. This meant that, should a respondent be able to nominate the nearest town to the park they visited, they could be prompted with a list of all possible surrounding parks. Respondents would then select from this list if they recognised the name.

In the situation where respondents were unable to provide the name of the park they had visited and/or were unable to give the name of the town near the park they visited, an attempt to capture the status (or type) of the park was made by asking the following question:

> **Q:** *Was that park a National Park, a State Conservation Area or a Nature Reserve, or was it a State Forest or some other type of park?*

Capturing this 'generic' description of the park type, although not specific, allowed respondents to continue with the survey rather than having the interview terminated because of lack of precise knowledge.

3.2.4 Questions Relating to NPWS Park Visits

Once it was ascertained that the respondent had visited a NPWS managed park, they were then asked questions pertaining to:

- The number of times they had visited the park;
- The number of children under 18 that accompanied them on that visit (which also verified if the children were of the same household, or from additional households);
- The activities in which they partook whilst at the park they most recently visited (including length of walk if they undertook walking activities);
- The level of satisfaction experienced whilst visiting the park they most recently visited;
- Duration of park visit;
- Type of trip taken when the park visit was made; and
- Role of the park visit in the overall decision to travel.

If more than one park had been visited by the respondent within the 4 week period, the same set of questions relating to whether the park was NPWS managed or not were asked, and if the park was identified as being NPWS managed, questions on the number of times visited, number of children visiting, visit duration, visit type and role of the park in the decision to travel were replicated.

Questions relating to activities and satisfaction were only asked about the NPWS Park visited *most recently*, as it was considered that recall of the experiences would be the most accurate for one's most recent visit. Asking these questions about every park visited, could lead to respondent

confusion and would also add significant amounts of time to questionnaire length, which would impact on overall project costs and potentially elevate refusal rates.

If the visits named by the respondent were more than nine or if the number of children claimed to have visited with the respondent was more than four, additional questions were asked to *confirm* that this was indeed the correct number. This process allowed potential outliers in visitation to be confirmed or amended at the point of interview, strengthening the validity of the visitation estimate.

To determine whether visits by children were in-scope or out-of-scope for this survey, a series of questions were designed. Firstly, early on in the survey, the number of children under 18 living in the household was asked. If the number of children visiting a NPWS Park was less than or equal to the number of children living in the household, the assumption was made that the children belonged to the household. However, if the number of children visiting was greater than the number living in the household a supplementary question was asked to determine which adult member of the party was responsible for these additional children.

If an adult member of the respondent's household was responsible for them, then they were included in the calculation of child visits for that household. If an adult from another household was responsible for these extra children, then they were excluded because of the likelihood of double-counting child visits, i.e. if the other adult travelling with the respondent was also surveyed, the children would have been counted by the original respondent and this new respondent, inflating the number of child visits.

For the 2008 survey it was recognised that a high number of visits and high number of children visiting contributed significantly to the overall child visitation estimate. To determine whether this high number of visits was in fact correct, a set of 'check' questions was added to the survey questionnaire. It was agreed with the NPWS that the threshold value to activate this check question series would be a total of 28 child visits (i.e. one visit per day over the 28 day visitation period). These 'check' questions were as follows:

> **Q:** *To calculate the number of children in your party that visited this park in the last 4 weeks we multiply the number of visits YOU made to this park by the number of children that visited with you on YOUR MOST RECENT VISIT. We calculate this to be [number] child visits in total over the last 4 weeks. Would this be approximately correct?*
> **IF NO OR CAN'T SAY:** *Could you please explain why this estimated figure is not correct?*

These check questions have continued to be used for the 2010, 2012, 2014, 2016, 2018 and 2020 surveys to ensure that the final child visitation value would more accurately reflect the actual child visitation estimate by eliminating invalid outliers.

3.2.5 Additional Questions Exploring NPWS Park Visitation

As of wave seven 2016 two new questions were asked of NPWS park visitors in relation to the type of trip they were taking when visiting a NPWS park and the role of the park visit in the respondent's overall decision to travel, as follows:

> ***Q:*** *Was visiting this park part of your regular daily, weekly or monthly routine; part of a day trip; part of an overnight visit or multi-day trip; or for some other reason?*

> ***Q:*** *Was visiting this park the only reason for your trip (100% of the trip purpose or intention), the main reason for your trip (75% of the trip purpose or intention); one of the main reasons for your trip (50% of the trip purpose or intention), a minor reason for your trip (25% of the trip purpose or intention), or not one of the reasons for your trip (0% of the trip purpose or intention)?*

In 2018, an additional question on duration of park visit was added, as follows:

> ***Q:*** *On this occasion was your visit to this park just for the day or did you stay in it overnight or for multiple nights?*
>
> 1. *Just for the day*
> 2. *Overnight*
> 3. *Multiple nights*
> 4. *Can't say/can't recall*

As a consequence the question on type of trip take was revised, as follows:

> **Q:** *Was visiting this park part of your regular daily, weekly or monthly routine; part of a larger/bigger day trip; part of a larger/bigger overnight visit or multi-day trip; or for some other reason?*

Finally, an additional question was asked in 2018 from those respondents who indicated that they had undertaken walking or bushwalking activities on their most recent visit:

> **Q:** *For how long did you [walk or bushwalk/walk the dog] on this visit? Was it less than an hour; up to half a day (four hours approx.); up to one day (eight hours approx.); or a multi-day walk?*

These questions were retained for the 2020 survey.

3.2.6 Park Visitor Market Needs Based Segmentation Questions

In 2015 the NPWS commissioned an online survey to develop a needs based segmentation for park visitors and non-visitors. The segmentation was based on two questions (1) incidence of undertaking selected activities for leisure purposes in the last 12 months; and (2) likelihood of taking an overnight trip to a NSW National Park in the next 12 months. For the 2018 NSW Park Visitation Survey these questions were added to enable the segmentation to be created for NSW park visitors (i.e. the questions were not asked of non-visitors to NSW parks). In addition, because the likelihood of taking an overnight trip was included, the NPWS requested that a question on the likelihood of taking a day trip to a NSW national park be included. The questions asked were as follows:

***Q:** Which of the following activities have you undertaken in the last 12 months FOR LEISURE PURPOSES? READ OUT*

1. *Education experiences of some form?*
2. *Aboriginal cultural experience?*
3. *Non-aboriginal small group heritage or cultural tours?*
4. *Experiences that provided you with a sense of balance/time out/health/ wellness?*
5. *Nature appreciation?*
6. *A low cost trip just to get out of home?*
7. *Taken visitors to visit a NSW national park?*
8. *Visited a natural place just to escape technology?*
9. *A family fun experience?*
10. *Exercising to get healthy?*
11. *Engaging with the arts in some way?*
12. *Attended an outdoor music/culture event?*
13. *Attended an outdoor sporting event*
14. *Stayed overnight in a special location*
15. *An extended walking trip?*

98. [DO NOT READ] NONE OF THESE
99. [DO NOT READ [CAN'T SAY/CAN'T RECALL

Q: *Using a scale of 1 to 10 where 1 means not at all likely and 10 means very likely, how likely are you to consider each of the following types of trips to a NSW national park IN THE NEXT 12 MONTHS? READ OUT*

A day trip to a NSW national park

RECORD NUMBER

99. CAN'T SAY/REFUSED

An overnight trip to a NSW national park

RECORD NUMBER

99. CAN'T SAY/REFUSED

These questions were retained for the 2020 survey.

3.2.7 Demographic Questions

Standard demographic questions were asked of all respondents at the beginning of the survey such as age, sex, geographic location, and the number of children usually living in the household, as these were pertinent for weighting[12] purposes or for calculating derived items used to ask questions later in the survey (e.g. extra children visiting was calculated by calculating the difference between the number of children on the visit and the number of children in the household).

Further demographics were asked of respondents who had visited a park (NPWS or non NPWS) at the end of the survey. These included questions such as the highest level of education achieved, employment status, the language usually spoken in the household, marital status, the lifecycle stage of the respondent, and whether they were the parent of a child living in the household. These questions were used to profile the type of visitor to NPWS Parks.

[12] Weighting is the factor by which a respondent's answers are multiplied to ensure that the group in which that respondent is a member is represented in the correct proportion. For this survey each respondent is weighted to the January 2018 population of each survey region, based on their age and sex (population data was obtained from the Australian Bureau of Statistics' National Labour Force Survey: Catalogue 6291.0).

In 2014 the question on language usually spoken in the household included an 'other – specify' response to capture in more detail other languages spoken. As of wave seven 2016, two additional questions were asked of all survey respondents on annual household income, as follows:

> ***Q:*** *What is the approximate ANNUAL IINCOME of your household (i.e. all income earned before any expenses, including tax, are deducted)?*
>
> **IF CAN'T SAY OR PREFER NOT TO SAY HOUSEHOLD INCOME: Q:** *Well would you say that your approximate annual household income is $65,000 or less per year or more than $65,000 per year?*

In 2020, survey respondents who had visited a park in NSW in the last 4 weeks were asked a question on disability, as follows:

> ***Q:*** *Do you identify as a person with a disability or as a person caring for someone with a disability?*

All visitation questions are analysed by these demographic questions for this report.

3.3 Response Rates and Strike Rates

In order to ensure that the survey estimates are as reliable as possible, a key objective was to set-up procedures to ensure that as many people as possible approached to complete the survey actually did complete it (i.e. minimise non-response). The sections following detail how this was achieved.

3.3.1 Response Rates

Table 3 highlights sample outcomes of the 2020 survey, and compares them with results from the 2008, 2010, 2012, 2014, 2016 and 2018 surveys, along with Roy Morgan Omnibus surveys conducted at similar times to the survey waves. The response rate is calculated as total interviews as a proportion of eligible contacts.

For the 2010 survey a new policy was enacted (in consultation with the NPWS), to attempt to complete each of the 13 survey waves in the shortest period as possible (within 4 days if possible). The main reason for doing so was to minimise the number of days of overlap between survey waves when a respondent could have visited a park in NSW. The average days in field for the 2010 survey were 5.15 compared with 7.15 in 2008 - an average reduction of two full days. However, response rates fell from 17.70% in 2008 to 13.27% in 2010 and it was agreed that for the 2012 survey that the field period would return to 7 days (average attained for 2012 was 6.85 days). Response rates subsequently increased to 14.55% in 2012. The average number of days that the survey was in field in 2014 was 7.62 days, with the average increasing to almost 8 days in 2016 (7.92—mostly due to difficulties in chasing quotas over weekends in field, resulting in more quota clean-up having to be undertaken on the Monday with most younger respondents only being available after the weekend). In 2018 and 2020, the average number of days in field were 6.08 and 5.08 respectively.

Whilst the general trend over time for telephone surveys is a decline in response rates (as households use answering machines, voicemail and number recognition to screen calls), the key reason for the lower response rate in 2010 related to the policy to complete the survey within a 4

day time period. This policy's introduction meant that fewer calls were made to the same telephone number in an attempt to obtain an interview, meaning that proportionately fewer households had the opportunity to complete the survey from the sample attempted (and contacted). Therefore, the lower response rate in 2010 can be in part attributed to not using sample efficiently in an effort to minimise field time. For this reason the policy reverted to managing fieldwork over a 7 day period for the 2012 to 2018 surveys.

In 2016 it was also determined (in consultation with the NPWS) to increase the proportion of mobile numbers called for two main reasons:

1. To increase the overall response rate; and
2. To ensure that the proportion of mobile only households surveyed was more in line with the Australian household population, in order to obtain a more representative survey sample (and hence a more accurate survey visitation estimate).

The response rate for mobile numbers was 19.19% in 2012 and 18.53% in 2014, whilst the landline response rate was 13.46% in 2012 and 11.08% in 2014. These resulted in overall response rates of 14.55% in 2012 and 12.62% in 2014.

Response rates from mobile numbers have since been – 20.66% - 2016; 23.36% - 2018; and 21.31% - 2020. While mobile number response rates for this survey have been declining over time, they still remain higher than the 2014 low (18.53%). For landlines, response rates have since been - 15.27% - 2016; 11.40% - 2018; and 14.68% - 2020, still above the 2014 low (11.08%) (See Table 3).

One major determinant in electing to use a 'stand-alone' survey approach for this survey was the belief (based on expert experience) that such a methodology would provide higher response rates and lower refusal rates than using an omnibus styled survey, thereby improving the overall quality and reliability of the data collected and hence, the overall estimate of visitation. Table 3 shows that response rates for this survey since 2008 have been markedly higher than shared cost omnibus surveys conducted at similar times of the year to NPWS survey waves (N.B. No telephone omnibus surveys were conducted by Roy Morgan in 2018 and 2020 that were conducted in a comparable time period to the NPWS park visitor survey). Shared cost omnibus surveys also use an RDD sampling frame, with the proportion of mobile numbers called set at 50% to 70%, similar to the parks visitation survey. This, therefore, allows for a direct comparison in response rates between the two surveys.

The disparity in response rates between the parks visitation survey and omnibus surveys has been consistent across all survey years. These results clearly show that the stand-alone survey approach provides more precise and reliable estimates of NPWS park visitation than would have a similar set of questions placed on an omnibus style survey.

3.3.2 Strike Rates for Visiting a Park in NSW in the last 4 weeks

The *strike rate* for this survey identified what proportion of those surveyed actually visited *any* type of park in NSW over the 4 weeks prior to being interviewed (excluding local council parks). This is important because those identified as visiting a park then go on to be asked specific questions about the type of park visited and, if it happens to be a NPWS park, the number of times they visited.

Table 3: Response Rate Comparison—NSW Parks Survey Compared with Roy Morgan Omnibus Surveys

Sample Outcomes (No.)	NSW Parks Visitation Survey								Roy Morgan Omnibus Survey*				
	2020		2018	2016	2014	2012	2010	2008	2016	2014	2012	2010	2008
	W1-13	AVE.	AVE.	AVE.	AVE.	AVE.	AVE.	AVE.	AVE.	AVE.	AVE.	AVE.	AVE.
Long Interviews[1]	1,455	112	161	164	160	141	140	149	n/a	n/a	n/a	n/a	n/a
Short Interviews[2]	14,183	1,091	1,042	1,042	1,044	1,063	1,063	1,060	n/a	n/a	n/a	n/a	n/a
Total Interviews	***15,638***	***1,203***	***1,203***	***1,206***	***1,204***	**1,204**	**1,203**	**1,209**	**636**	**595**	**808**	**744**	**736**
Refusals	59,636	4,587	4,817	4,111	5,854	4,856	5,008	3,226	3,459	3,792	4,194	4,396	4,711
Terminates	4,751	365	552	890	2,231	1,967	2,489	1,530	1,362	2,405	4,137	3,111	2,509
Appointments[3]	5,144	396	554	445	256	243	371	788	373	476	231	345	730
Total Eligible Households (HHs)	**85,169**	**6,551**	**7,127**	**6,653**	**9,545**	**8,270**	**9,071**	**6,753**	**5,831**	**7,268**	**9,369**	**8,596**	**8,686**
Total Quota Failures[4]	17,781	1,368	1,086	765	880	735	1,090	518	562	267	257	393	546
Business Numbers[5]	7,156	550	830	536	779	734	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Total Contacts	**110,106**	**8,470**	**9,042**	**7,954**	**11,204**	**9,738**	**10,161**	**7,271**	**6,393**	**7,535**	**9,626**	**8,989**	**9,232**
Computer Quota Fail prior to contact[6]	4,619	355	864	622	3,987	1,703	5,663	1,976	n/a	n/a	n/a	n/a	n/a
Engaged	6,651	512	476	174	258	130	85	17	235	611	412	169	100
No reply	92,946	7,150	8,783	8,059	5,709	3,690	2,612	1,261	6,649	8,285	7,652	7,142	3,439
Unobtainable	77,375	5,952	8,507	9,792	15,452	12,771	6,399	3,341	7,434	11,615	16,131	6,914	4,195
3+ Calls	165	13	28	18	2,571	1,958	799	742	0	100	693	297	489
Fax/modem	693	53	243	308	619	765	368	258	118	525	1,438	735	303
Answering Machine	233,671	17,975	15,654	7,947	5,480	4,282	924	628	5,018	3,945	2,692	1,678	1,488
Total Not Contacted	**416,120**	**32,009**	**34,556**	**26,920**	**34,075**	**25,299**	**16,850**	**8,223**	**19,454**	**25,082**	**29,018**	**16,936**	**9,973**
Total Used Sample (Attempted)	***526,226***	***40,479***	***43,598***	***34,874***	***45,279***	***35,038***	***27,011***	***15,494***	***29,931***	***30,563***	***38,644***	***25,925***	***19,205***
Long Interviews[1]	1.71%	1.71%	2.27%	2.47%	1.67%	1.71%	1.54%	2.21%	n/a	n/a	n/a	n/a	n/a
Short Interviews[2]	16.65%	16.65%	14.62%	15.66%	10.94%	12.85%	11.72%	15.70%	n/a	n/a	n/a	n/a	n/a
Total Interviews (Response Rate)	**18.36%**	**18.36%**	**16.89%**	**18.13%**	**12.62%**	**14.55%**	**13.26%**	**17.90%**	**10.91%**	**8.18%**	**8.63%**	**8.66%**	**8.47%**
Refusals	70.02%	70.02%	67.59%	61.80%	61.33%	58.72%	55.21%	47.77%	59.32%	52.17%	44.76%	51.14%	54.24%
Terminates	5.58%	5.58%	7.74%	13.37%	23.37%	23.79%	27.44%	22.66%	23.36%	33.09%	44.15%	36.19%	28.89%
Appointments[3]	6.04%	6.04%	7.78%	6.69%	2.68%	2.94%	4.09%	11.67%	6.40%	6.55%	2.46%	4.01%	8.40%
Total Eligible Households (HHs)	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

* No Roy Morgan Omnibus Surveys were conducted in 2018 and 2020 at a comparable time to the NPWS Parks Visitor Surveys.
Source: NPWS Parks Visitor Surveys 2008 – 2016; Roy Morgan Telephone Omnibus Surveys.

1. Respondents who have visited a park in NSW within the last 4 weeks.
2. Respondents who have not visited a park in NSW within the last weeks.
3. An appointment, which at the end of interviewing, was no longer required to be kept.
4. Quota failures –
   (a) age x sex x region quota full;
   (b) refused to provide age;
   (c) refused to provide number of children in the household; (d) refused postcode (mobile sample only);
   (e) refused landline phone question (mobile sample only);
   (f) refused mobile phone question (landline sample only); refused to provide total number in the household.
5. Identified as a business number when calling via RDD.
6. The region in which the respondent lived had already completed its quota of interviews. These records are then automatically moved to "Quota Fail" by the Fusion sample management system.

Therefore, the higher the strike rate, the more robust the NPWS visitation estimate is likely to become. It should be noted however, that the continuous improvement philosophy (see section 4 for more detail), which includes refining the survey methodology and sampling frame is also likely to have a positive impact on strike rate and the robustness of the visitation estimate.

The final sampling structure for this survey was designed based on findings arising from the survey pilot. It is therefore important that the actual strike rate obtained be close to or better than the strike rate estimated from the pilot survey. Otherwise the validity of the survey estimate could be questioned.

Using field outcome data obtained from the survey pilot conducted in September-October of 2007, it was estimated that 12.57% of people responding to the survey would in fact have visited a park of some type within the last 4 weeks of being surveyed. Table 4 shows that the final strike rates for each survey year were 12.29% for 2008, 11.66% for 2010, 11.71% for 2012, 13.27% for 2014, 13.63% for 2016 and 13.42% for 2018. These strike rate figures can be considered to be close to identical, indicating that original strike rate estimates were accurate. Such a result justifies the methodological approach recommended from the survey pilot as being valid. Strike rates per region are also comparable from 2008 to 2018.

However, for the 2020 survey the overall strike rate was 9.30%, much lower than the original estimate in 2007 of 12.57%. This is a direct result of park closures due to bushfires and COVID-19 restrictions. Even after restrictions in NSW were eased and NPWS parks were opened (i.e. June 2020) the rates did not return to normal levels – NSW strike rate during NSW restrictions – 19.11%; post-NSW restrictions 21.77%; Interstate strike rate during NSW restrictions – 2.66%; post-NSW restrictions – 2.71%. The lack of certainty that travel within NSW would remain unrestricted after COVID-19 restrictions were lifted would have reduced normal levels of visitation to NPWS parks, particularly those that are located some distance from one's residence (this may not have been the case for parks in close proximity). As for interstate respondents, it should be noted that COVID-19 border restrictions were not relaxed in regional Victoria and Queensland until October 2020 and in Melbourne in November 2020, reducing further the likelihood of visiting a NPWS park.

Table 4: Survey Strike Rates[13]

Survey Region	2020	2018	2016	2014	2012	2010	2008	2007 Pilot Estimate
Sydney	23.74%	29.01%	30.16%	29.61%	24.86%	25.15%	25.78%	28.64%
Remainder NSW	16.09%	24.81%	24.77%	23.97%	22.07%	21.24%	23.10%	25.58%
Total NSW	*20.34%*	*27.14%*	*27.77%*	*27.10%*	*23.62%*	*23.45%*	*24.49%*	*27.28%*
Melbourne	0.81%	2.07%	1.72%	1.65%	1.61%	1.38%	1.50%	2.23%
Remainder VIC	1.54%	2.99%	3.67%	3.06%	3.07%	2.76%	2.40%	2.23%
ACT	8.85%	14.25%	14.23%	14.63%	13.14%	12.82%	16.07%	9.80%
Brisbane	1.33%	3.62%	3.69%	3.06%	2.82%	3.17%	3.59%	2.23%
Remainder SE QLD	1.13%	3.28%	3.21%	3.01%	2.66%	3.32%	3.98%	2.23%
Total Interstate	*2.68%*	*5.18%*	*5.18%*	*5.00%*	*4.56%*	*4.65%*	*5.29%*	*3.74%*
Overall Strike Rate	**9.30%**	**13.42%**	**13.63%**	**13.27%**	**11.71%**	**11.66%**	**12.29%**	**12.57%**

Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=15,715; 2010 n=15,643; 2012 n=15,646; 2014 n=15,656; 2016 n=15,683, 2018 n=15,644; 2020 n=15,638.

[13] Strike rate is the number of respondents who have visited any park in NSW (except local parks) in the last 4 weeks, expressed as a proportion of all respondents surveyed.

3.4 Questionnaire Length

Questionnaire length varies depending on whether a respondent lived within NSW or interstate, and whether they had or had not visited a park within the last 4 weeks. Tables 5 and 6 illustrate the average questionnaire lengths for 2008 to 2020 surveys. In 2012 three new questions were added to the survey to determine household phone status and likelihood of selection, so that survey data could be more accurately weighted. In 2014 an 'other – specify' response was added to the languages spoken in the household question. In 2016, from wave 7 onwards two new demographic questions on household income were asked of all respondents, while two new questions exploring NPWS park visitation (type of trip and role of park visit in overall decision to travel) were asked of all NPWS park visitors for each NPWS park they visited (i.e. they could have been asked up to 5 times). From wave 11 to 13 in 2016 only all NSW and ACT respondents were asked four questions on NPWS park visitation advertising. These were removed for the 2018 survey. For 2018, additional questions on length of walk at one's most recently visited park and duration of stay at each park visited were asked. In addition, those who had visited a park in NSW were asked three questions to create segmentation variables used by the NPWS in other research studies. In 2020 and additional question on self-reported disability status was asked of all those who had visited a park NSW in the last 4 weeks

Overall questionnaire length declined from 3.11 minutes in 2018 to 2.79 minutes in 2020 (see Table 6). The reason for the overall decline in questionnaire length was the far greater proportions who had not visited a park in NSW in the last 4 weeks, primarily due to the NSW bushfires restricting access to parks and the COVID-19 restrictions which restricted movement to and within NSW. For visitors to parks in NSW average questionnaire length increased from 8.29 minutes in 2018 to 8.36 minutes in 2020 (see Table 5).

Table 5: Average Questionnaire Length by Visitor Type and Year

Average Questionnaire Length (mins)	Park Visitors							Park Non-Visitors						
	2020	2018	2016	2014	2012	2010	2008	2020	2018	2016	2014	2012	2010	2008
NSW Questionnaire	8.36	8.35	4.81	5.70	5.73	5.21	4.92	2.37	2.48	2.05	2.05	2.00	1.54	1.45
Interstate Questionnaire	8.38	8.10	4.68	5.83	5.60	5.55	5.14	2.14	2.22	2.09	1.83	1.76	1.33	1.24
Overall Questionnaire	**8.36**	**8.29**	**4.78**	**5.73**	**5.70**	**5.29**	**4.98**	**2.21**	**2.31**	**2.20**	**1.90**	**1.84**	**1.40**	**1.31**

Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=15,715; 2010 n=15,643; 2012 n=15,646; 2014 n=15,656; 2016 n=15,683, 2018 n=15,644; 2020 n=15,638.

The objective was to keep the overall average questionnaire length (i.e. those going through park visitor questions and those who didn't) to just over 3 minutes on average for all 13 waves in order to keep within cost parameters. The average interview length in 2020 was *2.79 minutes*, which aligned with this objective (Table 6).

Table 6: Average Overall Questionnaire Length by Year

Overall Questionnaire Length	All Respondents						
	2020	2018	2016	2014	2012	2010	2008
Average Questionnaire Length (mins)	2.79	3.11	2.55	2.41	2.29	1.85	1.76

Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=15,715; 2010 n=15,643; 2012 n=15,646; 2014 n=15,656; 2016 n=15,683, 2018 n=15,644, 2020 n=15,638.

4. Continuous Improvement

In order to ensure that the final NPWS park visitation estimate obtained was the most accurate possible, procedures have been put into place to ensure that the quality of survey data obtained improved as the survey progressed (i.e. from wave to wave). The following section details the processes that have been put into place for this survey.

4.1 Improving the Accuracy of NPWS/Non-NPWS Park Nominations

As previously discussed, a key issue emerging from the 2007 pilot study was respondent's difficulty with distinguishing the difference between a NPWS managed park and any other park. As a means of capturing more accurate data over time, thus resulting in more reliable visitation estimates, a variety of quality assurance processes were applied throughout field, and directly afterwards. Such quality assurance practices included:

1. Updating lists of park name aliases at the end of each wave to improve park categorisation (i.e. any new park name that could distinguish between a NPWS park and a non-NPWS park was added to the park name list);
2. Adding names of non-NPWS parks regularly visited to assist in excluding parks not in-scope for the survey;
3. A rigorous post-field 'cleaning' phase of any responses where a park 'type' could not be assigned at the time of interviewing. This primarily took the form of visually checking park names and locations that could not be classified at the time of interview and re-classifying them into the appropriate category; and
4. Referring parks that could not be classified via post-field 'cleaning' to the NPWS for a final decision on categorisation.

The post-field 'cleaning' phase, detailed in points 3 and 4 above, was integral to the capture of accurate park visitation data for the NPWS.

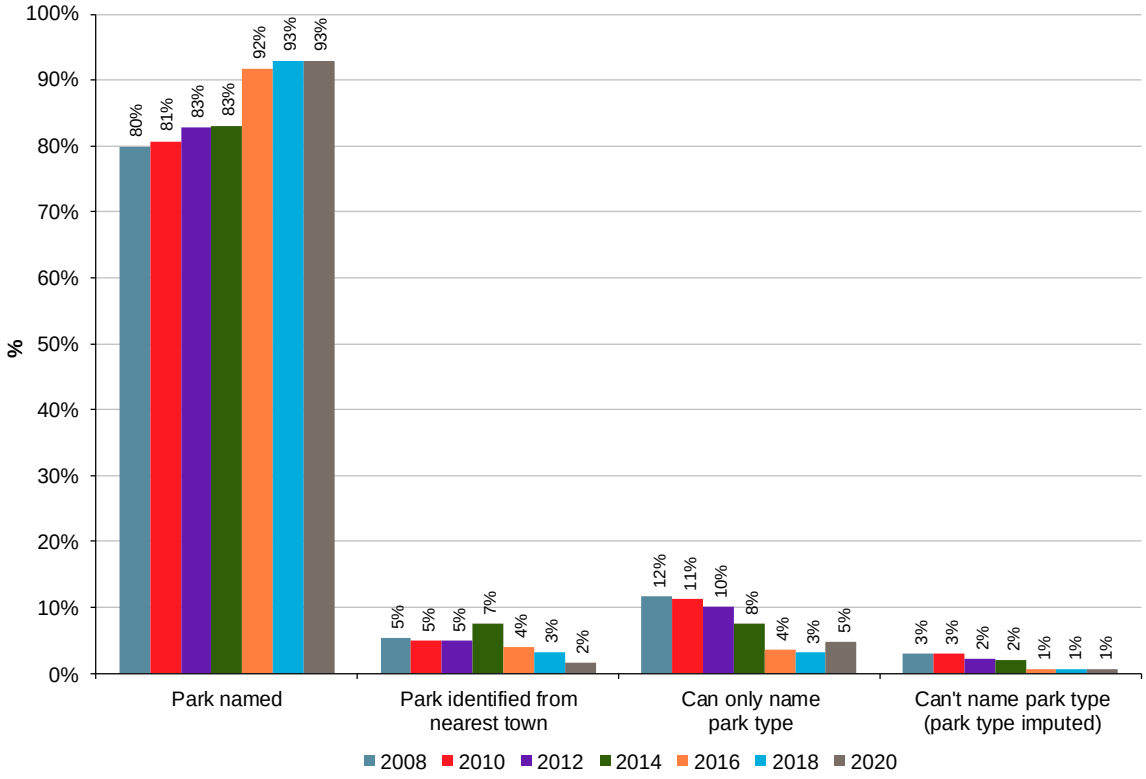
On completion of each field phase all 'other (specify)' responses relating to park name and type were reviewed and where possible, assigned the correct park name and/or a NPWS or non-NPWS status. This was achieved through the following process:

1. Roy Morgan received all other specify/can't say responses pertaining to park name/park location/park type for review;
2. Roy Morgan conducted a web search based on the information given by the respondent—i.e. the alias given or the geographical area in which they believed the park was located. In most cases evidence was obtained using Google Maps and the Google search engine;
3. Roy Morgan, where possible, assigned the correct park name/park type;
4. Any queries or uncertainties with allocating a park name/park type were then sent to the NPWS for review, input, and final approval.

Chart 2 highlights the effectiveness of this approach with the proportion of respondents directly providing the *name* of the park increasing with each survey, with 96% of all parks identified in 2018 being named directly by the respondent (via their name or the nearest town to them, up from 85% in 2008)—the highest level recorded. In addition, the proportion of parks identified only by the

respondent naming the park *type* is declining over time, while the proportion of parks imputed in 2018 and 2016 were the lowest recorded (1%), indicating that park allocation is becoming increasingly efficient with time, that respondents are becoming more knowledgeable about the parks they visit, or both.

Chart 2: Allocation of Park Type by Method[14]



Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=15,715; 2010 n=15,643; 2012 n=15,646; 2014 n=15,656; 2016 n=15,683, 2018 n=15,644; 2020 n=15,638

4.2 Improving the Accuracy of the Visitation Estimate

For any survey, potential over or under-estimation of the survey estimate is inherent in the collection methodology employed, sampling frame used and the questionnaire designed. The objective of any survey is to (a) minimise the effect of any unwanted factors that may be affecting the survey estimate; and/or (b) adjust for their effect. The following factors have been identified as affecting the overall NPWS park visitation estimate and an explanation provided as to how they have been addressed in calculating the final estimate figure:

1. **Non-response bias**—people refusing or terminating the survey may be less likely to visit any park in NSW in the last 4 weeks than those agreeing to be surveyed. Therefore an estimate of NPWS park visitation based on responses of those who complete the survey could be an over-estimate. For the 2020, 2018, 2016, 2014, 2012 and 2010 surveys and

[14] If respondents could not provide the name of the park they visited, or the name of the park could not be ascertained from the town claimed to be nearest to that park, they were then asked to classify the park as being a National Park, State Conservation Are or Nature Reserve or not (i.e. the *type* of park visited).

waves 7-13 of the 2008 survey, an attempt was made to ask people who refuse or terminate the survey the following question:

Before you go, can I ask you one short question? In the last 4 weeks, that is, SINCE [current date less 28 days], have you visited a park like a National Park in New South Wales?

If the proportion visiting a park in NSW in the last 4 weeks differs between survey respondents and those who refuse or terminate, an adjustment factor can be applied rectify the non-response bias in the visitation estimate.

Using data obtained from this non-response analysis, an adjustment to the overall visitation estimate was undertaken to provide a more accurate estimate.

2. **Telescoping**—there may be a tendency for respondents to over-estimate the 4 week time period for visiting a park, thereby over-estimating NPWS park visitation (i.e. actual parks visited within the time period and number of times visited within the time period). For example, if a person is asked in mid-May if they visited a park within the last 4 weeks, they may recall back to a time in April that was more than 4 weeks ago. Furthermore, during this time they may have visited that park numerous times, but only a portion of these visits may have in fact occurred during the 4 week period. To counteract this telescoping effect, for the 2010, 2012, 2014, 2016, 2018 and 2020 surveys and waves 7-13 of the 2008 survey, the exact day and date four weeks ago was specified to respondents in order to focus them on parks visited since that date and number of times visited since that date. The day and date updated automatically with each new survey day, as detailed in the following two example questions:

   What is the NAME of the National Park, State Conservation Area, Nature Reserve, State Forest or other park you visited MOST RECENTLY in NEW SOUTH WALES in the past 4 weeks, that is, SINCE [DAY] [DATE] [MONTH]?

   How many times did you visit [%PARK_NAME] in the last 4 weeks, that is, SINCE [DAY] [DATE] [MONTH]?

3. **Impact of sampling frame changes on survey estimates** - In 2012 the sampling frame changed from being sourced from the Electronic White Pages (EWP) to Random Digit Dialling (RDD) of both landline and mobile numbers, which is likely to have an impact on the visitation estimate.

   Firstly, this frame change increases the likelihood of surveying households with new phone listings (as Sensis no longer provides EWP listings, sources used to obtain new listings are likely to omit numbers that Sensis would have otherwise included).

   Secondly, silent numbers now have the potential to be contacted and interviewed due to random number generation (although such households are more likely to refuse to be interviewed, so their representation in the final survey sample is likely to be lower than their incidence in the actual household population, but will be higher than their representation in the 2008 and 2010 samples).

   Finally, the inclusion of RDD mobile numbers in the sample frame increases the likelihood of surveying households that have mobile phones, but not landlines (i.e. mobile only households). This is a significant and growing proportion of the population (over 39% of

households in 2018, up from 6% in 2008). These households tend to be younger and are likely to have differing park visitation habits to other households (e.g. this survey shows that younger people tend to have lower levels of visitation to NPWS parks than older people). It is considered that the omission of mobile only households from the 2008 and 2010 sampling frames is likely to have slightly inflated the overall NPWS park visitation estimate in these years.

Using data obtained from the 2012 survey and having data on known incidence rates of mobile only households over time, 2008 and 2010 visitation estimates were adjusted to account for the under-representation of mobile only households in their respective sample frames. Please refer to section 5.6 for more detail.

4. **HTS Data calculation for non-surveyed regions**—currently it is assumed that incidence of visitation for non-surveyed regions is at best as per the lowest visitation level of surveyed regions for both adult and child visitation (i.e. Victoria). It is likely that visitation for these non-surveyed regions is actually even lower than the survey estimate used, indicating an over-estimation of visitation from non-surveyed regions. However, the contribution of the non-surveyed regions to the visitation estimate is small (i.e. just 0.4% of the overall 2020 visitation estimate), so an over-estimate in non-survey region visitation has minimal effect on the overall visitation estimate.

5. **Other Factors affecting the Estimate**—Whilst the above four factors are likely to have the most significant effect on the overall visitation estimate, there are other factors relating to collection of data which may also have an effect:
    - *Imputation rules for missing data or 'can't say'*—manual editing of data post-field can identify a park not previously recognised as a NPWS park as being one. In these instances, number of times visited and number of children visiting sometimes needs to be imputed. For those that provide a 'can't say' response to a visitation related question, this number must also be imputed. Appropriate rules to use for imputation were determined with consideration of their effect on the overall survey estimate and how much they could alter the estimate; and
    - *Potential outliers*—high numbers of visits or high numbers of children visiting can have a marked impact on the overall visitation estimate obtained. It was decided that outliers should be included based on the confirmation of high responses with the respondents themselves at the time of interview.

Analysis of imputation and outlier effects has been conducted for both the 2008 and 2010 surveys. For both surveys, it was determined that these effects have a negligible impact on the overall NPWS park visitation estimate. For more detail, please refer to Appendix 7 in each of these survey reports.

5. Method of Calculating NPWS Park Visitation

The methodology for calculating annual NPWS park visitation has two main stages:

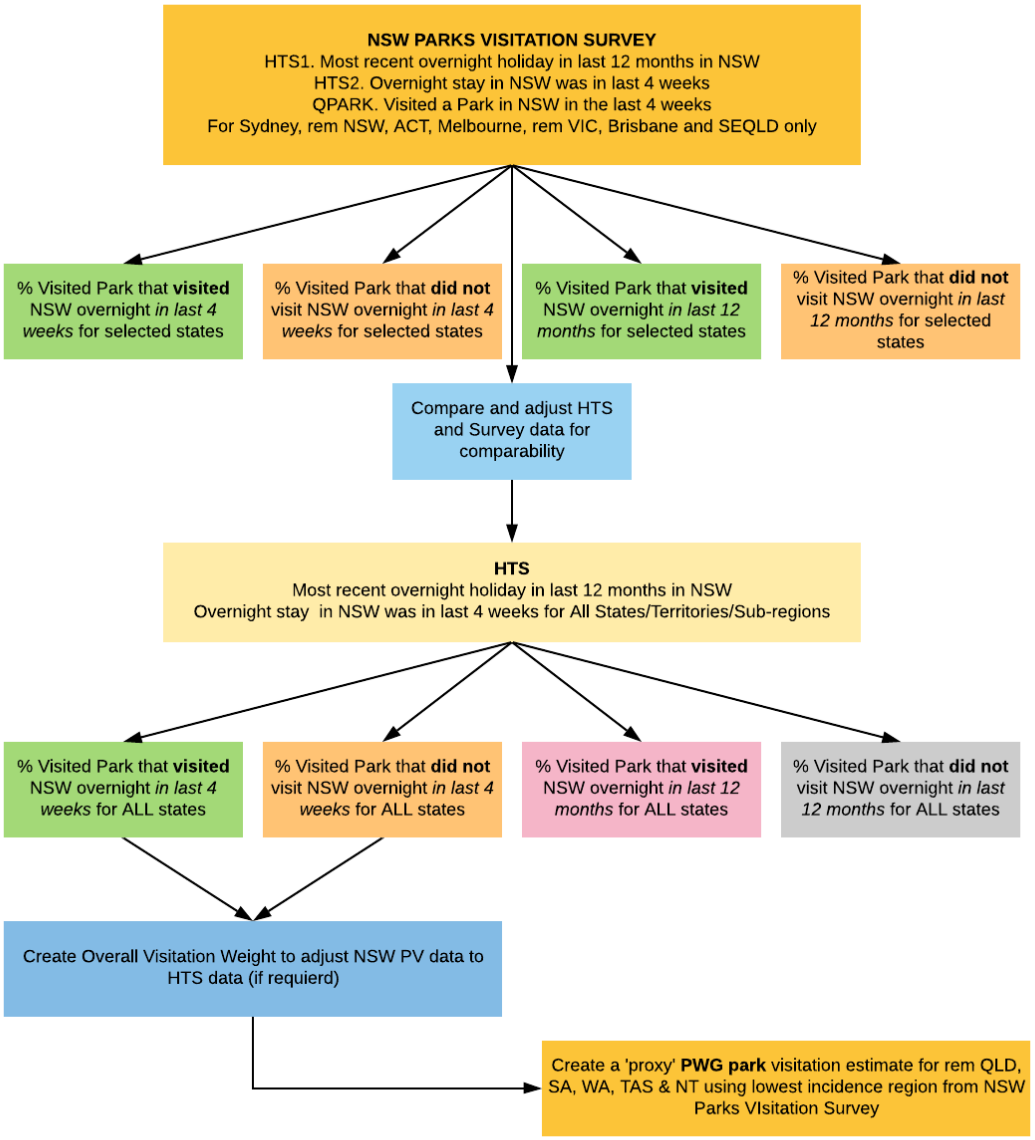
1. Calculate visitation for the seven regions of Australia that were surveyed (i.e. Sydney, Remainder NSW, ACT, Melbourne, Remainder VIC, Brisbane and Remainder Southeast Queensland).
2. Using comparative questions placed on the NSW Parks Visitation Survey with the same questions asked on the Roy Morgan Holiday Tracking Survey (HTS), create a 'proxy' estimate of visitation for the remaining five regions of Australia (i.e. Remainder QLD, SA, WA, TAS and NT).

The rationale for creating a 'proxy' estimate for NPWS park visitation for five regions of Australia was that these regions have the lowest levels of incidence in visiting NSW in any 4 week period and therefore incidence of visiting a NPWS Park in NSW would also be equivalently lower than for surveyed regions. Conducting a survey over a 12-month period in such low incidence regions would not yield sufficient sample without an inordinate allocation of sampling effort. Therefore, it was determined that NPWS visitation from these five non-surveyed regions would be estimated from existing HTS data, regarded as an accurate measure of visitation by region across Australia (i.e. a sample of over 20,000 respondents are surveyed for the HTS each year).

Figure 1 provides a summary of the standard visitation calculation.

However, as a new sampling frame was implemented for the 2012 survey and beyond, adjustments to the visitation estimates for 2008 and 2010 were required to account for the non-surveying of mobile only households in these years. This adjustment is detailed in section 5.6.

Figure 1: Summary of NPWS Parks Annual Visitation Calculation



5.1 Taking a Robust Approach to Estimating Visitation

In calculating the NPWS park visitation estimate a *robust* approach was undertaken for this study. It was determined that it was better to derive an estimate that is likely to err on the side of caution, than derive an estimate that could be unduly inflated.

The methods used to ensure that a robust approach to calculating the estimate was undertaken included:

- Focusing survey effort in regions where visitation to NSW was likely and significantly large, in order to strengthen the confidence limit of the estimate;
- Conducting the survey as a 'stand-alone' survey rather than 'piggy-backing' questions on an Omnibus survey to improve response rates and reduce non-response bias, thereby improving the reliability of the estimate;
- Including questions common to the Roy Morgan HTS to enable validation and possible adjustment of survey data to industry recognised and verifiable data;
- Limiting recall of visitation to 'within the last 4 weeks' to improve accuracy;
- Asking respondents to name the park they visited, ensuring that the park visited could be classified as either NPWS or non-NPWS managed, thereby minimising counting of out-of-scope visits;
- Designing a series of questions to confirm park type when the respondent could not recall the park name to again minimise counting of out-of-scope visits;
- Including confirmation questions for high numbers of visits, high numbers of children visiting and high numbers of child visits to ensure that potential outliers are valid; and
- Excluding any children over and above the number in the household, if an adult in the respondent's household was not responsible for the care of these children on that visit, to minimise the likelihood of double-counting child visits.

5.2 NPWS Adult Park Visitation Calculation from Survey Data

A seven step process was conducted to calculate NPWS park *adult* visitation from survey data, as follows:

1. Identify four groups of respondents claiming to have visited a park in NSW within the last 4 weeks who –
    - were able to directly name the park that they visited within the last 4 weeks;
    - were able to name the nearest town to the park they visited within the last 4 weeks, which enabled identification of the park name via read out lists;
    - could not name the park they visited within the last 4 weeks, but could name the type of park they visited (i.e. NPWS or non-NPWS); and
    - could not name the park nor the type of park visited within the last 4 weeks.
2. Determine the proportion of those directly naming a NPWS park to those naming a non-NPWS park that they visited (i.e. the name of the park provided has been allocated as being either NPWS or non-NPWS);

3. Assume that those only naming the park type visited were correct in their categorisation and allocate them accordingly to the NPWS or NPWS park category[15];
4. Randomly allocate those that could not name the park nor the type of park they visited (i.e. in 1d) in proportion to those who were able to directly name the park they visited (i.e. in 1a)[16];
5. Calculate the unweighted average number of visits to each NPWS park (i.e. exclude from the calculation the "can't say" and blank[17] fields)—approximately 99% of responses in 2018;
6. Allocate the average number of visits to "can't say" and blank fields—approximately 1% of NPWS responses in 2018; and
7. Multiply each respondent by the appropriate age by sex by region weight and then multiply by the number of visits for each respondent and sum to obtain total visits.

5.3 NPWS Child Park Visitation Calculation from Survey Data

To calculate NPWS park *child*[18] visitation from survey data a six step process was followed:

1. Use NPWS parks allocated for the *adult* visitation estimate, as well as number of adult visits made to each park;
2. Use the following assumptions for the child visitation calculation:
    - Assume that if children visited a specific NPWS park with the adult on the *most recent visit* to that park, the children visited on *all* visits to that NPWS park in the 4 week period (i.e. the most likely scenario is for the adult to take the children with them, whenever they visited the park);
    - Assume that if the number of children visiting the NPWS park on the most recent visit is *equal to* or *less than* the number of children living in the household, the children visiting with the adult are from that same household (i.e. if the household has 2 children and 2 children visited the park, they are likely to be the 2 children who live in the household);
    - If the number of children visiting the NPWS park on the most recent visit is *greater than* the number of children living in the household, the following calculation applies:
        - If the number of extra[19] children were *under the care* of the respondent or another adult member of their household, these extra children were included in the child visitation estimate;

[15] Pilot survey results conducted in September-October 2007 indicated that the proportion of respondents incorrectly claiming the park they visited was a NPWS park was balanced out by similar proportions of respondents incorrectly claiming that they visited a non-NPWS park. It was determined that the error factor was so similar that any re-allocation of data toward or away from NPWS Parks for the 2008 to 2020 surveys would not improve survey estimates for visitation to NPWS parks and, as a consequence, no adjustment was made to 2008 to 2020 survey data. The robust approach taken was not to attempt to edit these responses.

[16] It was determined that those able to *name* the park they visited had the greatest likelihood of correct allocation of a park to the NPWS or non-NPWS category. Therefore, those for which the park type was not defined should be allocated in proportion to those that could name the park they visited, particularly since only a small proportion of responses, require such allocation (i.e. 1%-4% of all responses in each survey year).

[17] Blanks eventuate primarily through those that 'can't say' the park type. Because a respondent does not *know* the type of park visited they are not asked the number of times visited (this rule was incorporated to shorten survey length). In limited circumstances, evidence of park name, nearest town and park type may allow, through post editing, some of these parks to be re-defined as NPWS or non-NPWS parks *prior* to the pro-rata allocation process outlined in step 4 above. However, number of visits would still remain blank and so must be imputed as detailed in step 6.

[18] A child is classified as being under 18 years of age.

[19] Extra children is calculated as number of children visiting that specific NPWS park on the respondent's most recent visit to that park, less the number of children living in the respondent's household.

- If the number of extra children were *not* under the care of the respondent or another adult member of their household (i.e. an adult member from another household), these extra children were *not* included in the child visitation estimate (i.e. to reduce double-counting of children in the estimate).

3. If the number of children visiting is unknown (i.e. can't say or blank), allocate number of children visiting as follows:
    - For 0 child households, allocate the mean number of children visiting from all 0 child households visiting a NPWS park where the number of children visiting was provided after data manipulations 2ci and 2cii have been applied;
    - For 1 child households, allocate the mean number of children visiting from all 1 child households visiting a NPWS park, as per 3a above;
    - For 2 child households, allocate the mean number of children visiting from all 2 child households visiting a NPWS park, as per 3a above;
    - For 3 child households, allocate the mean number of children visiting from all 3 child households visiting a NPWS park, as per 3a above;
    - For 4 or more child households, allocate the mean number of children visiting from all 4 or more child households visiting a NPWS park, as per 3a above.
4. Where the number of extra children visiting with the adult in the household cannot be determined (i.e. can't say or blank), randomly allocate whether the extra children were or were not in the care of the adult in the household via the proportion of responses that could allocate the care of these children to the adult in the household or not;
5. Multiply the number of visits to each NPWS park by the number of eligible[20] children visiting that park on the most recent visit—i.e. raw child visits; and
6. Multiply each respondent by the appropriate number of children in the household by region weight; then multiply this by the number of raw child visits for each NPWS park and sum to obtain total visits.

5.4 Total NPWS Park Visitation Calculation from Survey Data

To calculate the total number of NPWS park visits from survey data for all waves in 2008, 2010, 2012, 2014, 2016 and 2018, the following calculation applies:

1. Sum the number of adult visits to a NPWS park obtained for each respondent multiplied by their individual population survey weight for all 13 survey waves;
2. Sum the number of child visits to a NPWS park for each household multiplied by their household survey weight for all thirteen survey waves; and
3. Sum total annual adult visits and total annual child visits to obtain total NPWS visits from survey data.

[20] An eligible child is one determined to be in the care of the respondent's household i.e. the respondent's children or any extra children deemed to be in the care of the respondent or another member of the respondent's household.

5.5 NPWS Park Visitation Calculation for Non-surveyed Regions

Roy Morgan Holiday Tracking Survey (HTS) data provides estimates of overnight visitation to NSW in the last month. This NSW Parks visitation survey asks a similar set of questions to respondents as follows:

> ***QHTS1**. Thinking back over the last 12 months to your MOST RECENT HOLIDAY of one or more nights away from home. Was the holiday in...?*
> *1. New South Wales*
> *2. Another Australian State or Territory*
> *3. Overseas*
> *4. Did not go on a holiday of one or more nights in the last 12 months*
> *5. Can't say*
>
> ***QHTS2**. Was that holiday in the last 4 weeks?*
> *1. Yes*
> *2. No*
> *3. Can't Say*

However, a person can possibly visit a park on a day trip to NSW even if they do live interstate. As such, an additional question was included to calculate the amount of day trips to New South Wales by non-NSW respondents, as follows:

> ***QTRAVEL**. Have you visited New South Wales within the last 4 weeks?*
> *1. Yes*
> *2. No*
> *3. Can't Say*

This question allows an adjustment to be made to overall visitation to NSW in the last 4 weeks. However, to calculate visitation to a NPWS Park, the only comparable information between the two surveys is the incidence of overnight visitation to NSW in the last 4 weeks/month. HTS data is compared with Parks Visitation Survey data to determine whether any adjustment is required to ensure survey data is in line with HTS data.

The key assumption made to calculate NPWS park visitation from non-surveyed regions, using HTS data as a proxy, is that *the proportion of adult visitors to a NPWS park as a proportion of those visiting NSW overnight is equivalent to the proportion achieved for the survey region with the lowest proportion visiting a NPWS park*. This ratio of visitation is then applied across non-surveyed regions to calculate the proportion of adults visiting NPWS parks per region. To calculate total adult visits from these regions, the total number of adults visiting is then multiplied by the average number of adult visits for the survey region with the lowest proportion of adults visiting a NPWS park.

To calculate child visitation for these non-survey regions the key assumption made is that *child visitation to a NPWS Park for these regions is no better than child visitation for the region surveyed with the lowest incidence of visitation*. The ratio of child visitors to adult visitors to this lowest incidence survey region is calculated and applied to each non-survey region to calculate number of child visitors from each region. The average number of visits per child for this lowest incidence survey region is then applied to non-survey regions to calculate total number of child visits per region.

Overall visitation from each non-survey region is then simply the sum of adult visits and child visits in these regions.

5.6 NPWS Park Visitation Estimate Revision to Account for Sample Frame Change

As the 2012, 2014, 2016, 2018 and 2020 survey sample frames use a Random Digit Dialling (RDD) approach, the sample was not only weighted to be representative of the population by age, sex, region and number of children in the household (as was the case for the 2008 and 2010 surveys), but was also weighted to account for phone status in the population. Households were classified as (1) landline only households; (2) mobile only households; and (3) households with both landline and mobile phones.

However, as the sampling frame for the 2008 and 2010 surveys was based on the Electronic White Pages (EWP), questions to calculate household phone status were not included. As a consequence visitation estimates for the 2012, 2014, 2016, 2018 and 2010 surveys were not strictly comparable with estimates obtained for the 2008 and 2010 surveys because the weighting regimen differed.

In order to enable comparison of visitation estimates between years, the following process was undertaken:

- Re-weight and rerun all 13 waves of the 2012 survey, excluding respondents from mobile only households, to quantify the difference made to the visitation estimate as a result of the addition of respondents in mobile only households;
- Calculate percentage difference in the 2012 visitation estimate for both adult child visitation with respondents from mobile only households excluded;
- Use Roy Morgan Single Source data to determine the percentage of mobile only households in 2008, 2010 and 2012;
- Calculate percentage difference in the visitation estimates for 2008 and 2010 based on the ratio of mobile only households in these years, compared to 2012;
- Apply these percentage differences to calculate the number of adult visits and number of child visits in 2008 and 2010.

Data by wave, region or origin, NPWS Branch, Region and individual park had to be also adjusted so that they summed to the revised visitation estimates in 2008 and 2010.

6. Annual Visitation Estimate Calculation

6.1 Summary of Visitation Estimate

The 2020 annual NPWS park visitation estimate after the conclusion of waves 1-13 (and including calculation of visitation from non-surveyed states) is as follows:

38,541,509	Annual Adult Visitation Estimate
11,543,729	Annual Child Visitation Estimate
50,085,238	**Annual Total Visitation Estimate**

The 2008 and 2010 visitation estimates were adjusted to account for the change in sampling frame in 2012. The 2020 visitation estimate is the third highest recorded – lower than the 2018 estimate of 60,236,009 and the 2016 estimate of 51,661,944. It is higher than the 2008 to 2014 estimates of 37,927,616, 33,843,626, 35,495,625 and 39,436,048 respectively. The sections following detail how the estimates were calculated.

6.2 Calculating the Visitation Estimate

6.2.1 Annual Visitation from Survey Data

Estimated annual visitation to NPWS parks is as follows:

$$\text{Annual NPWS Visitation} = \sum[\text{Adult visits}^{1} + \text{Child visits}^{1}] \text{ for the 13 survey waves}$$

1. Within the last 4 weeks.

The final estimate is then *adjusted* to take into account the effect of non-response bias. The 2008 and 2010 estimates were also adjusted to account for the change in sampling frame from Electronic White Pages (EWP) to Random Digit Dialling (RDD) in 2012. The following sections highlight each element of the estimation calculation.

6.2.2 Adult Visitation from Survey Data (Unadjusted)

Table 7 shows that adult visitation to NPWS parks by region of origin (i.e. survey region), based solely on survey data, shows that intrastate visitation for 2008 to 2020 (i.e. visitation from adults from Sydney and the remainder of NSW) contributes more than 90% of all adult visits (92.2% in 2020; 92.7% in 2018, 91.8% in 2016; 92.2% in 2014; 92.3% in 2012; 92.2% in 2010; 91.9% in 2008). Interstate visitation contributes around 7-8% of all adult visits.

In 2020 visits from Sydney comprised 64.2% of all visits - the highest proportion recorded. The lowest proportion of visits was recorded for remainder Victoria in 2020 (0.7%).

Table 7: Estimated Annual NPWS Adult Visits by Region of Origin (Unadjusted)

Adult Visits	Sydney	Rem NSW	ACT	Mel-bourne	Rem VIC	Bris-bane	Rem SE QLD	Total
2020	**24,643,448**	**10,759,161**	**568,640**	**638,612**	**272,135**	**876,922**	**628,634**	**38,387,554**
2018	35,084,511	19,573,313	805,508	1,338,504	456,954	1,051,892	631,894	58,942,575
2016	28,438,583	18,727,916	677,087	1,194,898	759,929	1,062,244	544,753	51,405,409
2014	31,170,105	16,872,905	799,762	883,076	586,123	1,279,176	497,960	52,089,107
2012	23,111,368	13,670,963	581,421	948,561	396,057	548,075	508,300	39,764,745
2010	24,461,077	13,504,242	703,853	551,148	361,080	799,600	795,125	41,176,125
2008	24,937,199	15,665,180	682,956	1,316,305	363,321	559,223	656,074	44,180,260
% Contribution	**Sydney**	**Rem NSW**	**ACT**	**Mel-bourne**	**Rem VIC**	**Bris-bane**	**Rem SE QLD**	**Total**
2020	**64.2%**	**28.0%**	**1.5%**	**1.7%**	**0.7%**	**2.3%**	**1.6%**	**100.0%**
2018	59.5%	33.2%	1.4%	2.3%	0.8%	1.8%	1.1%	100.0%
2016	55.3%	36.4%	1.3%	2.3%	1.5%	2.1%	1.1%	100.0%
2014	59.8%	32.4%	1.5%	1.7%	1.1%	2.5%	1.0%	100.0%
2012	58.1%	34.4%	1.5%	2.4%	1.0%	1.4%	1.3%	100.0%
2010	59.4%	32.8%	1.7%	1.3%	0.9%	1.9%	1.9%	100.0%
2008	56.4%	35.5%	1.5%	3.0%	0.8%	1.3%	1.5%	100.0%

Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=15,715; 2010 n=15,643; 2012 n=15,646; 2014 n=15,656; 2016 n=15,683, 2018 n=15,644; 2020 n=15,638

6.2.3 Child Visitation from Survey Data (Unadjusted)

Child visitation to NPWS parks is calculated somewhat differently to adult visitation, because age and gender data was not collected for each child visiting as part of the survey. As such, child visitation data could not be weighted by age, sex and region as was adult visitation data. Number of children living in the household was collected however, so this variable, along with region of origin, were used to weight child visitation data.

Table 8 highlights the number child visits to NPWS parks by number of children living in the household. Of note is the marked decline from 2008 to 2012 in the number and proportion of child visits from households with no children living in them (e.g. grandparents taking their grandchildren on a visit, school teachers taking pupils etc.). In 2008 over one third of child visits came from households with no children (35.3%), while in 2012 this group's contribution to child visitation had fallen to 9.0%.

However, contribution from households with no children rebounded slightly in 2014 to 13.8%, but has then declined to 8.7% in 2016 and to its lowest levels in 2018 (5.7%), while rebounding to 9.3% in 2020. The two most evident changes in child visitation from 2016 to 2020 from 2014 levels are the decrease in contribution to visitation from households with 1 child (from 22.0% in 2014 down to 17.8% in 2020) and the comparable increase in contribution to visitation from households with 3 children from 2014 to 2018 (from 18.2% in 2014 up to 23.0% in 2016 and 23.4% in 2018). For 2020 the increase was observed in households with 4 or more children (from 6.2% in 2014 to 18.7% in 2020).

Table 8: Estimated No. of Child Visits by Children in the Household (Unadjusted)

Child Visits	0 Child Households	1 Child Households	2 Child Households	3 Child Households	4+ Child Households	Total Households
2020	**1,072,338**	**2,052,350**	**4,705,121**	**1,517,435**	**2,154,115**	**11,501,359**
2018	1,101,383	3,726,896	8,235,668	4,528,917	1,759,755	19,352,618
2016	1,297,950	2,859,493	6,052,547	3,410,700	1,237,005	14,857,694
2014	1,764,403	2,810,789	5,101,398	2,333,645	793,486	12,803,721
2012	842,222	1,174,471	3,559,805	2,440,984	1,389,177	9,406,659
2010	1,294,248	1,741,682	4,166,142	1,794,088	1,008,865	10,005,026
2008	3,448,526	1,571,218	2,185,440	1,895,168	664,968	9,765,320
% Contribution	0 Child Households	1 Child Households	2 Child Households	3 Child Households	4+ Child Households	Total Households
2020	**9.3%**	**17.8%**	**40.9%**	**13.2%**	**18.7%**	**100.0%**
2018	5.7%	19.3%	42.6%	23.4%	9.1%	100.0%
2016	8.7%	19.2%	40.7%	23.0%	8.3%	100.0%
2014	13.8%	22.0%	39.8%	18.2%	6.2%	100.0%
2012	9.0%	12.5%	37.8%	25.9%	14.8%	100.0%
2010	12.9%	17.4%	41.6%	17.9%	10.1%	100.0%
2008	35.3%	16.1%	22.4%	19.4%	6.8%	100.0%

Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=15,715; 2010 n=15,643; 2012 n=15,646; 2014 n=15,656; 2016 n=15,683, 2018 n=15,644; 2020 n=15,638

Breakdown by region in Table 9 reveals that in 2016, the contribution of intrastate child visits to all child visits was at lowest recorded at 88.6% (92.6 in 2020; 91.3% in 2018; 93.4% in 2014; 90.4% in 2012; 89.3% in 2010; 91.5% in 2008), with contribution from interstate visits at its highest at 11.4% (7.4% in 2020; 8.7% in 2018; 6.6% in 2014; 9.6% in 2012; 10.7% in 2010; and 8.5% in 2008).

Table 9: Estimated No. of NPWS Park Child Visits by Survey Region (Unadjusted)

Child Visits	Sydney	Rem NSW	ACT	Mel-bourne	Rem VIC	Bris-bane	Rem SE QLD	Total
2020	**7,352,996**	**3,303,813**	**144,258**	**83,432**	**167,214**	**275,998**	**173,648**	**11,501,359**
2018	12,046,938	5,627,696	305,942	477,163	175,179	581,041	138,658	19,352,618
2016	8,009,805	5,159,990	222,035	465,818	219,624	250,429	529,993	14,857,694
2014	8,093,988	3,868,752	204,061	237,383	130,062	190,995	78,480	12,803,721
2012	5,195,139	3,303,904	206,820	190,859	104,748	181,110	224,078	9,406,659
2010	5,721,350	3,216,259	198,245	105,049	109,198	356,619	298,305	10,005,026
2008	5,457,863	3,473,977	165,277	155,522	71,086	134,190	307,406	9,765,320
% Contribution	Sydney	Rem NSW	ACT	Mel-bourne	Rem VIC	Bris-bane	Rem SE QLD	Total
2020	**63.9%**	**28.7%**	**1.3%**	**0.7%**	**1.5%**	**2.4%**	**1.5%**	**100.0%**
2018	62.2%	29.1%	1.6%	2.5%	0.9%	3.0%	0.7%	100.0%
2016	53.9%	34.7%	1.5%	3.1%	1.5%	1.7%	3.6%	100.0%
2014	63.2%	30.2%	1.6%	1.9%	1.0%	1.5%	0.6%	100.0%
2012	55.2%	35.1%	2.2%	2.0%	1.1%	1.9%	2.4%	100.0%
2010	57.2%	32.1%	2.0%	1.0%	1.1%	3.6%	3.0%	100.0%
2008	55.9%	35.6%	1.7%	1.6%	0.7%	1.4%	3.1%	100.0%

Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=15,715; 2010 n=15,643; 2012 n=15,646; 2014 n=15,656; 2016 n=15,683, 2018 n=15,644; 2020 n=15,638

6.2.4 Annual Survey Visitation Adjustment

As stated in section 4.2 of this report, the survey estimates can be over-inflated because of (1) non-response bias (i.e. those people who elect not to be interviewed having different park visitation patterns to those surveyed); and (2) time period telescoping (i.e. respondents recalling visits to parks outside of the survey visitation period—more than 4 weeks prior to being surveyed); (3) sampling frame changes (i.e. from EWP to RDD); and (4) other factors such as outliers and imputation effects. Analysis from past surveys shows that the effects of telescoping and other factors is minor and so only the two factors for non-response and sampling frame change are addressed individually in the sections below.

6.2.4.1 Adjustment for Non-response

This report details estimates of visitation for all 13 waves of the 2020 survey. The questionnaire was designed to account for non-response bias (and at the same time minimise the telescoping effect). People not electing to complete the survey were asked the following question:

> *Before you go, can I ask you one short question? In the last 4 weeks, that is, SINCE [DAY] [DATE] [MONTH], have you visited a park like a National Park in New South Wales?*

Survey questions were also designed to ensure that respondents were aware of the actual commencement date of the 4 week time period, in order to remove reporting of visitation to parks outside of this time period, as follows:

> *What is the NAME of the National Park, State Conservation Area, Nature Reserve, State Forest or other park you visited MOST RECENTLY in NEW SOUTH WALES in the past 4 weeks, that is, SINCE [DAY] [DATE] [MONTH]?*
>
> *How many times did you visit [%PARK_NAME] in the last 4 weeks, that is, SINCE [DAY] [DATE] [MONTH]?*

The effects of non-response bias and telescoping have been assessed together (i.e. as one net effect) as procedures put in place to measure their effects have been undertaken since wave 1 of the 2010 survey. While it is extremely difficult to separate the individual effect of non-response bias from the telescoping effect, the telescoping effect will be extremely small due to the inclusion of the actual date 28 days prior to the respondent being surveyed for all relevant visitation questions. Separation of each effect is therefore of little consequence to this study so long as the combined effect of both is accounted for in the overall NPWS park visitation estimate. As the telescoping effect for the study will be minimal, further discussion the overall effect will be regarded as the effect of non-response bias.

To calculate the magnitude of non-response bias, comparison of the proportion of people *surveyed* who claimed to have visited a NSW park within the last 4 weeks must be compared with the proportion of people *contacted, but not surveyed* who claimed to have visited a NSW park over the same time period.

The visitation estimate can therefore be adjusted to account for non-response bias by making the following key assumptions:

1. Non-respondents who *did not* answer the parks visitation question would have the same visitation habits as non-respondents that *did* answer the question;
2. By weighting respondents and non-respondents to the population of each region, an *actual* non-response/telescoping adjustment factor can be obtained; and
3. The non-response/telescoping adjustment factor can be equally applied to visitation to NPWS parks as non-NPWS parks.

Table 10 highlights the method of calculating the non-response adjustment figure for waves 1-13 of the 2020 survey and compares adjustment factors with the 2018, 2016, 2014, 2012, 2010 and 2008 surveys.

Overall the non-response adjustment factor for 2020 was the highest of all seven surveys (0.7711), with the lowest adjustment factor occurring in 2014 the lowest (0.5953).

Table 10: Non-response Adjustment by Region 2020

Contact Type - Waves 1-13 2020	Total	Sydney	Rem NSW	ACT	Mel-bourne	Rem VIC	Bris-bane	Rem SE QLD
Persons Contacted, Not Surveyed -								
Yes - Visited a NSW Park[1]	1,760	700	428	346	59	56	77	94
No - Did Not Visit a NSW Park[1]	28,657	4,121	2,915	5,105	4,762	3,051	4,101	4,602
No definitive response given[2]	40,206	7,339	4,758	5,395	5,971	3,699	5,999	7,045
Total Contacted, Not Surveyed	**70,623**	**12,160**	**8,101**	**10,846**	**10,792**	**6,806**	**10,177**	**11,741**
Adjusted Yes - Not Surveyed[3]	*4,171*	*1,751*	*1,034*	*705*	*132*	*137*	*189*	*223*
Adjusted No - Not Surveyed[3]	*66,452*	*10,409*	*7,067*	*10,141*	*10,660*	*6,669*	*9,988*	*11,518*
Persons Contacted, Surveyed -								
Yes - Visited a NSW Park[1]	1,455	773	420	173	21	20	26	22
No - Did Not Visit a NSW Park[1]	14,183	2,483	2,190	1,782	2,583	1,282	1,931	1,932
Total Contacted, Surveyed	**15,638**	**3,256**	**2,610**	**1,955**	**2,604**	**1,302**	**1,957**	**1,954**
Total Yes - Visited a NSW Park[1]	**5,626**	**2,524**	**1,454**	**878**	**153**	**157**	**215**	**245**
Total No - Did Not Visit a NSW Park[1]	**80,635**	**12,892**	**9,257**	**11,923**	**13,243**	**7,951**	**11,919**	**13,450**
Total Contacted	**86,261**	**15,416**	**10,711**	**12,801**	**13,396**	**8,108**	**12,134**	**13,695**
18 Yrs+ Population - Jan 2020	**15,070,272**	**4,187,978**	**2,166,462**	**328,760**	**4,043,608**	**1,191,687**	**1,948,146**	**1,203,631**
Wtd Yes Pop'n - Visited a NSW Park - All Contacts[1, 5]	**1,127,598**	**685,560**	**294,141**	**22,546**	**46,158**	**23,096**	**34,537**	**21,560**
%of Population - All Contacts	**7.48%**	**16.37%**	**13.58%**	**6.86%**	**1.14%**	**1.94%**	**1.77%**	**1.79%**
Wtd Yes Pop'n - Visited a NSW Park -All Surveyed[1, 6]	**1,462,327**	**994,259**	**348,626**	**29,092**	**32,610**	**18,305**	**25,882**	**13,552**
%of Population - All Surveyed	**9.70%**	**23.74%**	**16.09%**	**8.85%**	**0.81%**	**1.54%**	**1.33%**	**1.13%**
Non-response Adjustment Factor Waves 1-13[7] 2020	**0.7711**	**0.6895**	**0.8437**	**0.7750**	**1.4155**	**1.2617**	**1.3344**	**1.5910**
Non-response Adjustment Factor Waves 1-13[7] 2018	**0.7600**	**0.6847**	**0.7385**	**0.8246**	**1.3881**	**1.2183**	**1.0118**	**1.1532**
Non-response Adjustment Factor Waves 1-13[7] 2016	**0.7667**	**0.7533**	**0.7285**	**0.7487**	**1.2293**	**0.6915**	**0.8049**	**0.9761**
Non-response Adjustment Factor Waves 1-13[7] 2014	**0.5953**	**0.5927**	**0.5791**	**0.5883**	**0.6674**	**0.6673**	**0.6449**	**0.6686**
Non-response Adjustment Factor Waves 1-13[7] 2012	**0.7040**	**0.6938**	**0.6692**	**0.7741**	**0.8687**	**0.8158**	**0.7877**	**0.9368**
Non-response Adjustment Factor Waves 1-13[7] 2010	**0.6560**	**0.6094**	**0.6747**	**0.8155**	**0.9440**	**0.8841**	**0.7334**	**0.7841**
Non-response Adjustment Factor Waves 7-13[7] 2008	**0.6927**	**0.7314**	**0.6424**	**0.7742**	**0.6623**	**0.4835**	**0.5705**	**0.6071**

Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n= 43,763; 2010 n=113.745; 2012 n=96,055; 2014 n=103,103; 2016 n=53,454, 2018 n=74,717; 2020 n=86,261

1. Visited within last 4 weeks.
2. Can't say if visited, Refused to answer question, hung-up before answering.
3. Key assumption that those not giving a definitive response to the question would have answered in the same proportions (i.e. yes, no) as those who did.
4. Sum of adjusted yes and adjusted no with responses to those who were surveyed and answered yes or no.
5. Proportion answering yes multiplied by the 18yrs+ population for all contacts.
6. Proportion answering yes multiplied by the 18yrs+ population for all surveyed.
7. Weighted yes population for all surveyed ÷ Weighted yes population for all contacts.

It should be noted that the non-response adjustment calculation for the 2016 estimate was revised in 2018 as a result of an identified error in the calculation. As such, the visitation estimate for 2016 has been amended.

Table 11 shows the non-response adjustment factor calculated for each survey wave in 2020. These adjustment factors are used to calculate the visitation estimate on a wave by wave basis.

Table 11: Non-response Adjustment Factor by Wave for 2020

Non-response Adjustment 2020						
Wave 1	**Wave 2**	**Wave 3**	**Wave 4**	**Wave 5**	**Wave 6**	**Wave 7**
0.5950	0.7442	0.9061	0.6878	0.8292	1.0078	0.5922
Wave 8	**Wave 9**	**Wave 10**	**Wave 11**	**Wave 12**	**Wave 13**	**Total**
0.9181	0.5795	0.9183	0.7762	0.6423	0.8126	**0.7711**

Source: NPWS Parks Visitor Surveys 2020
Base: n= 86,261

6.2.4.2 Adjustment for Sample Frame Changes

As the sampling frame in 2008 and 2010 used the Electronic White Pages, while Random Digit Dialling was used in 2012, 2014, 2016 and 2018 an adjustment to the 2008 and 2010 estimate was made in order to accurately compare visitation estimates over time. As discussed in section 5.1, the main difference between the two sampling methods is that mobile only households have not been catered for in 2008 and 2010.

The inclusion of mobile only households in the sampling frame tends to reduce the 2012 visitation estimate marginally, as can be seen in Table 12.

Table 12: 2012 NPWS Park Visitation Including & Excluding Mobile Only Households (Unadjusted)

	Unadjusted visits - All respondents	Unadjusted Visits - Excluding Mobile only respondents	Factor	Difference
Adult visits 2012	40,000,051	39,736,931	99.3422%	0.6578%
Child visits 2012	9,406,659	9,253,133	98.3679%	1.6321%

Source: NPWS Parks Visitor Surveys 2012
Base: 2012 n=15,646;

The proportion of mobile only households each year is then used to calculate the Mobile only adjustment factor (Table 13).

Table 13: Proportion of Mobile Only Households - NPWS Survey Regions

	2008	2010	2012
Population	8.3%	14.2%	20.3%
Households	5.6%	9.4%	13.5%

Source: Roy Morgan Single Source
Base: 2008 n=38,135; 2010 n=36,521; 2012 n=38,032;

The adjustment factor was then calculated dividing the proportion of mobile only households in 2008 or 2010 by the proportion of mobile only households in 2012 and multiplying by the percentage difference in the 2012 visitation estimate when mobile only households are included in the sample frame. For adult visits the proportion of mobile only persons in the population is used, while for children the proportion of mobile only households is used (Table 14).

Table 14: Adjustment Factor for Sampling Frame Change—2008 and 2010

	2008	2010
Adult visits 2012	99.73%	99.54%
Child visits 2012	99.33%	98.86%

Source: NPWS Parks Visitor Surveys 2008-2010
Base: 2008 n=15,715; 2010 n=15,643; 2012 n=15,646

6.2.4.3 Revised Survey Visitation Estimates based on Non-response Adjustment

Adjusted annual NPWS park visitation on a region of origin basis (Table 15) shows that intrastate visitation in 2020 accounts for the second highest proportion of total visits since surveying commenced (92.3% compared with 88.3% of visits in 2018; 89.1% of visits in 2016; 91.8% of visits in 2014, 90.4% of visits in 2012; 89.5% in 2010; and 92.4% in 2008). This increase is due to a marked increase in the proportion of visits from Sydney residents (64.1%) – only the second time that Sydney has provided more than 60% of all visits (60.6% in 2014). As discussed in section 7.1, this is likely to be due to the impact of COVID-19 restrictions limiting interstate visitation, thereby proportionally increasing local visitation.

Table 12: Adjustment Park Visitation Estimate by Region of Origin

Adjustment Calculation		Sydney	Rem NSW	ACT	Mel-bourne	Rem VIC	Bris-bane	Rem SE QLD	Total
2020	Unadjusted Adult visits	34,924,746	12,461,219	717,023	440,873	210,769	642,187	386,109	49,782,927
	Adult Non-response Adjustment	24,643,448	10,759,161	568,640	638,612	272,135	876,922	628,634	38,387,554
	Unadjusted Child visits	10,414,132	3,824,058	181,787	57,562	129,426	201,992	106,588	14,915,546
	Child Non-response Adjustment	7,352,996	3,303,813	144,258	83,432	167,214	275,998	173,648	11,501,359
	Total Adjusted Visits	**31,996,444**	**14,062,974**	**712,899**	**722,045**	**439,348**	**1,152,920**	**802,282**	**49,888,913**
	% Contribution	*64.1%*	*28.2%*	*1.4%*	*1.4%*	*0.9%*	*2.3%*	*1.6%*	*100.0%*

Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n= 43,763; 2010 n=113.745; 2012 n=96,055; 2014 n=103,103; 2016 n=53,454, 2018 n=74,717; 2020 n=86,261

Table 15: Adjustment Park Visitation Estimate by Region of Origin (continued)

Adjustment Calculation		Sydney	Rem NSW	ACT	Mel-bourne	Rem VIC	Bris-bane	Rem SE QLD	Total
2018	Unadjusted Adult visits	35,084,511	19,573,313	805,508	1,338,504	456,954	1,051,892	631,894	58,942,575
	Adult Non-response Adjustment	24,826,386	14,937,554	686,399	1,920,076	575,301	1,099,846	753,084	44,798,646
	Unadjusted Child visits	12,046,938	5,627,696	305,942	477,163	175,179	581,041	138,658	19,352,618
	Child Non-response Adjustment	8,496,182	4,280,504	259,832	682,205	219,813	605,504	164,701	14,708,741
	Total Adjusted Visits	**33,322,568**	**19,218,058**	**946,231**	**2,602,281**	**795,114**	**1,705,350**	**917,785**	**59,507,387**
	% Contribution	*56.0%*	*32.3%*	*1.6%*	*4.4%*	*1.3%*	*2.9%*	*1.5%*	*100.0%*
2016	Unadjusted Adult visits	28,438,583	18,727,916	677,087	1,194,898	759,929	1,062,244	544,753	51,405,409
	Adult Non-response Adjustment	21,674,979	13,804,029	512,902	1,486,208	531,682	865,048	538,022	39,412,870
	Unadjusted Child visits	8,009,805	5,159,990	222,035	465,818	219,624	250,429	529,993	14,857,694
	Child Non-response Adjustment	6,033,527	3,758,926	166,228	572,615	151,865	201,558	517,333	11,402,052
	Total Adjusted Visits	**27,708,506**	**17,562,955**	**679,130**	**2,058,823**	**683,547**	**1,066,606**	**1,055,355**	**50,814,922**
	% Contribution	*54.5%*	*34.6%*	*1.3%*	*4.1%*	*1.3%*	*2.1%*	*2.1%*	*100.0%*
2014	Unadjusted Adult visits	31,170,105	16,872,905	799,762	883,076	586,123	1,279,176	497,960	52,089,107
	Adult Non-response Adjustment	18,565,768	9,819,573	472,802	592,299	393,032	828,945	334,561	31,006,979
	Unadjusted Child visits	8,093,988	3,868,752	204,061	237,383	130,062	190,995	78,480	12,803,721
	Child Non-response Adjustment	4,840,104	2,232,473	120,097	156,027	81,458	118,630	51,671	7,600,461
	Total Adjusted Visits	**23,405,872**	**12,052,045**	**592,899**	**748,326**	**474,490**	**947,575**	**386,232**	**38,607,440**
	% Contribution	*60.6%*	*31.2%*	*1.5%*	*1.9%*	*1.2%*	*2.5%*	*1.1%*	*100.0%*
2012	Unadjusted Adult visits	23,180,212	13,734,851	606,660	948,561	396,057	617,054	516,654	40,000,051
	Adult Non-response Adjustment	16,270,424	9,299,610	475,095	833,710	326,906	584,813	367,971	28,158,528
	Unadjusted Child visits	5,195,139	3,303,904	206,820	190,859	104,748	181,110	224,078	9,406,659
	Child Non-response Adjustment	3,641,563	2,233,970	161,747	167,522	86,342	171,414	159,376	6,621,933
	Total Adjusted Visits	**19,911,987**	**11,533,580**	**636,843**	**1,001,232**	**413,248**	**756,226**	**527,347**	**34,780,462**
	% Contribution	*57.3%*	*33.2%*	*1.8%*	*2.9%*	*1.2%*	*2.2%*	*1.5%*	*100.0%*
2010	Unadjusted Adult visits	24,461,077	13,504,242	703,853	551,148	361,080	799,600	795,125	41,176,125
	Adult Non-response Adjustment	15,114,365	9,239,166	582,011	527,563	323,682	594,579	632,195	27,013,561
	Adult Sampling Frame Adjustment	15,044,991	9,196,758	579,340	525,141	322,197	591,850	629,293	26,889,569
	Unadjusted Child visits	5,721,350	3,216,259	198,245	105,049	109,198	356,619	298,305	10,005,026
	Child Non-response Adjustment	3,601,436	2,093,971	159,300	111,491	100,659	274,546	222,386	6,563,789
	Child Sampling Frame Adjustment	3,560,452	2,070,142	157,487	110,222	99,513	271,422	219,855	6,489,093
	Total Adjusted Visits	**18,605,442**	**11,266,899**	**736,827**	**635,363**	**421,710**	**863,272**	**849,148**	**33,378,662**
	% Contribution	*55.7%*	*33.8%*	*2.2%*	*1.9%*	*1.3%*	*2.6%*	*2.5%*	*100.0%*

Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n= 43,763; 2010 n=113.745; 2012 n=96,055; 2014 n=103,103; 2016 n=53,454, 2018 n=74,717; 2020 n=86,261

Table 15: Adjustment Park Visitation Estimate by Region of Origin (continued)

Adjustment Calculation		Sydney	Rem NSW	ACT	Mel-bourne	Rem VIC	Bris-bane	Rem SE QLD	Total
2008	Unadjusted Adult visits	24,937,199	15,665,180	682,956	1,316,305	363,321	559,223	656,074	44,180,260
	Adult Non-response Adjustment	18,242,438	10,065,750	528,865	871,997	175,679	319,116	398,373	30,602,217
	Adult Sampling Frame Adjustment	18,193,366	10,038,673	527,442	869,651	175,206	318,257	397,301	30,519,897
	Unadjusted Child visits	5,457,863	3,473,977	165,277	155,522	71,086	134,190	307,406	9,765,320
	Child Non-response Adjustment	3,998,918	2,235,745	128,188	103,189	34,427	76,695	186,954	6,764,117
	Child Sampling Frame Adjustment	3,972,285	2,220,855	127,335	102,502	34,198	76,184	185,709	6,719,068
	Total Adjusted Visits	**22,165,651**	**12,259,529**	**654,777**	**972,153**	**209,404**	**394,441**	**583,010**	**37,238,965**
	% Contribution	*59.5%*	*32.9%*	*1.8%*	*2.6%*	*0.6%*	*1.1%*	*1.6%*	*100.0%*

Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n= 43,763; 2010 n=113.745; 2012 n=96,055; 2014 n=103,103; 2016 n=53,454, 2018 n=74,717; 2020 n=86,261

6.2.4.4 Wave by Wave Analysis of Adjusted Visitation Survey Estimates

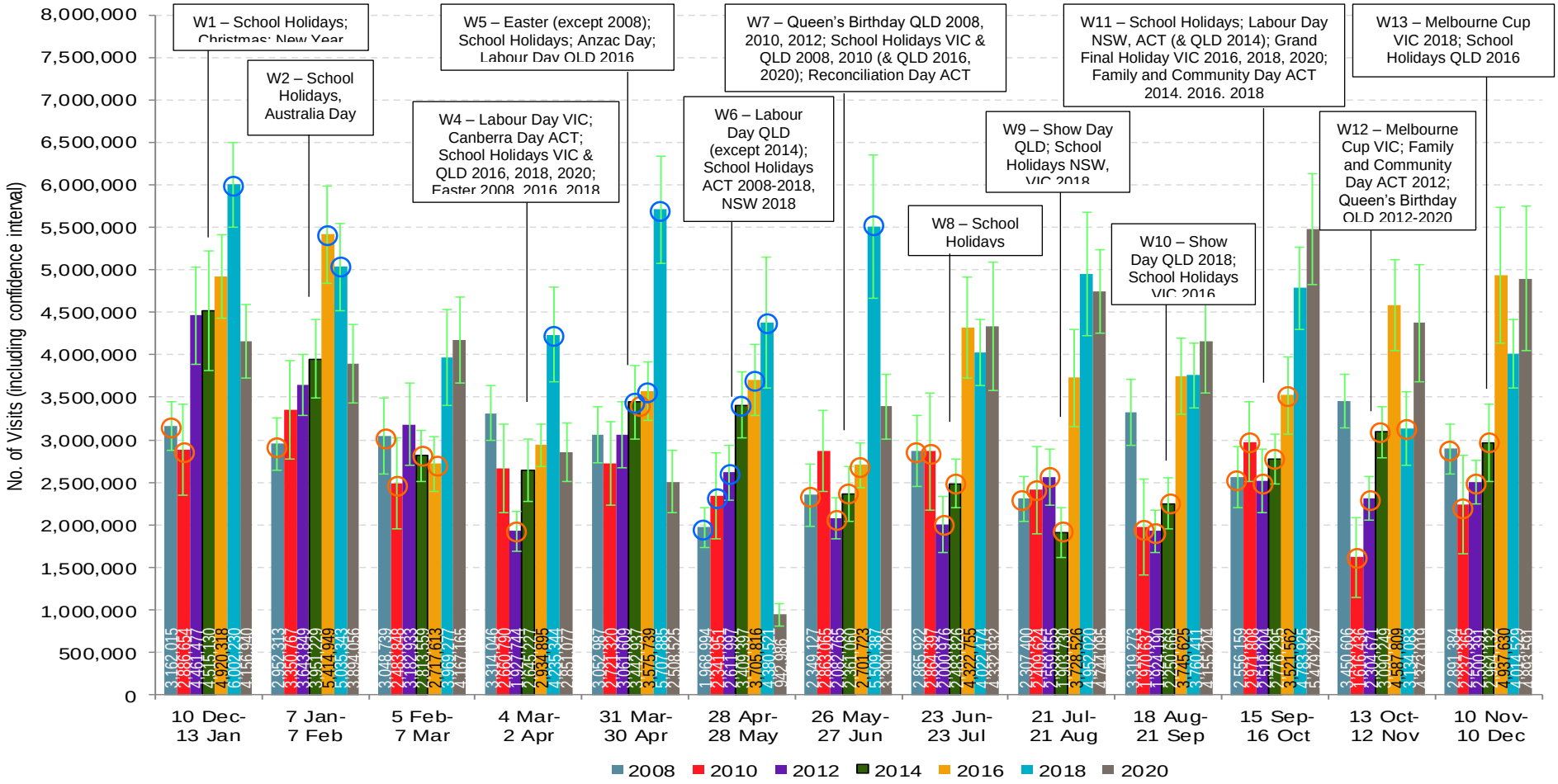
Please note that data for each survey year has been aligned so that survey waves follow the calendar year. This alignment applies for all sections showing visitation by survey wave. Where significance testing has been undertaken, coloured circles highlight when a result from 2008, 2010, 2012, 2014, 2016 or 2018 is significantly higher or lower than the 2020 result (at the 95% confidence level). The wave in which a public holiday or school holidays fall has also been displayed to identify waves where NPWS park visitation may be affected by these events.

Chart 3 shows **overall visitation** wave by wave for survey estimates only and includes the margin of error for each wave. From wave 1 to wave 7 NSW NPWS park visitation in 2018 was significantly higher than visitation in 2020 (the exception being wave 3). Visitation was the lowest ever recorded in waves 5 and 6 (April-May) when COVID-19 restrictions were in full force. The highest ever levels of visits were recorded in 2020 for waves 3, 8, 10 and 11, though none were significantly higher than the next highest year's estimate.

As can be seen in Chart 4, in general **adult visitation** in 2018 tends mirror overall visitation in adult visitation with 2018 estimates significantly higher than 2020 estimates for waves 1 and 2 and waves 4 to 7. Adult visitation was significantly low for wave 6 2020 (May) and the lowest recorded for wave 5 (April). The highest levels of visitation were observed in 2020 for waves 3, 9 and 11.

In relation to **child visitation** to NPWS parks (see Chart 5), visitation was the lowest recorded in waves 5 and 6 of 2020. However, child visitation was highest (though not significantly so) for wave 8 and waves 10 to 13 in 2020. It was significantly lower than the 2018 estimate for waves 1, 4 to 7 and 9.

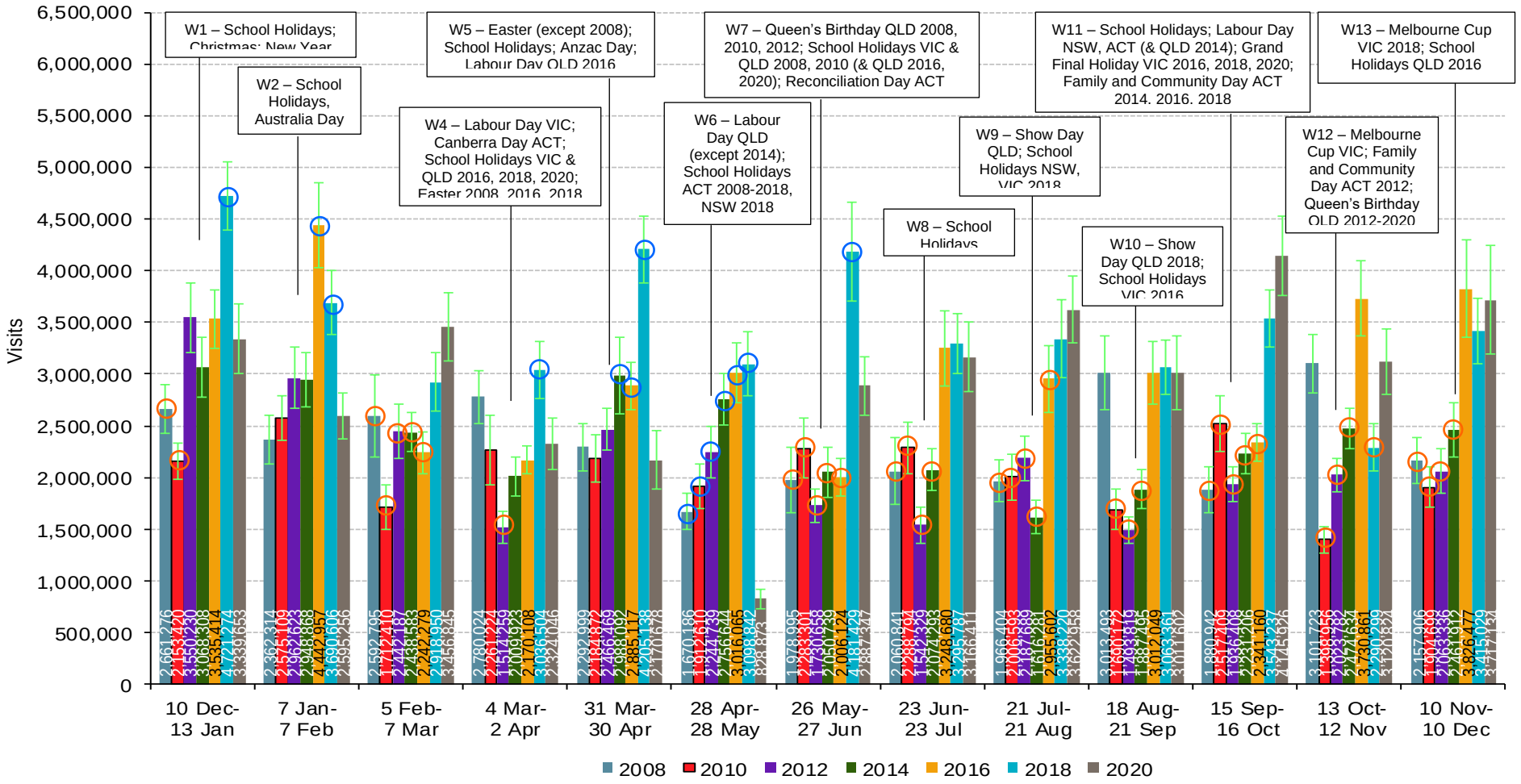
Chart 3: Adjusted Annual Visitation Survey Estimate by Wave



Source: NPWS Parks Visitor Surveys 2008 – 2020
Base: 2008 n=1,563; 2010 n=1,468; 2012 n=1,457; 2014 n=1,667; 2016 n=1,728, 2018 n=1,739l 2020 n=1,178

Significantly lower than 2020 estimate
Significantly higher than 2020 estimate

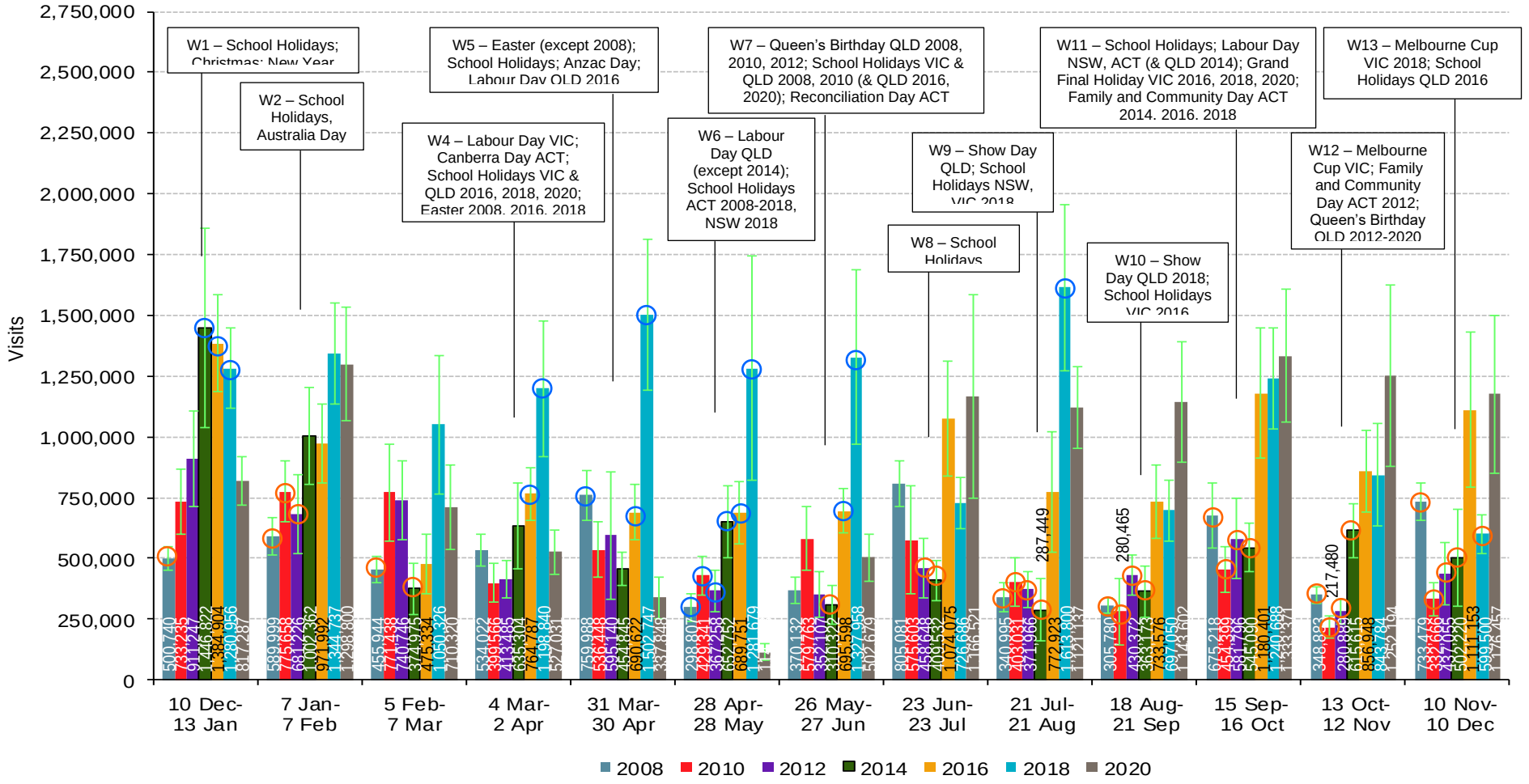
Chart 4: Adjusted Adult Visitation Survey Estimate by Wave



Source: NPWS Parks Visitor Surveys 2008 – 2020
Base: 2008 n=1,563; 2010 n=1,468; 2012 n=1,457; 2014 n=1,667; 2016 n=1,728, 2018 n=1,739l 2020 n=1,178

Significantly lower than 2020 estimate
Significantly higher than 2020 estimate

Chart 5: Adjusted Child Visitation Survey Estimate by Wave



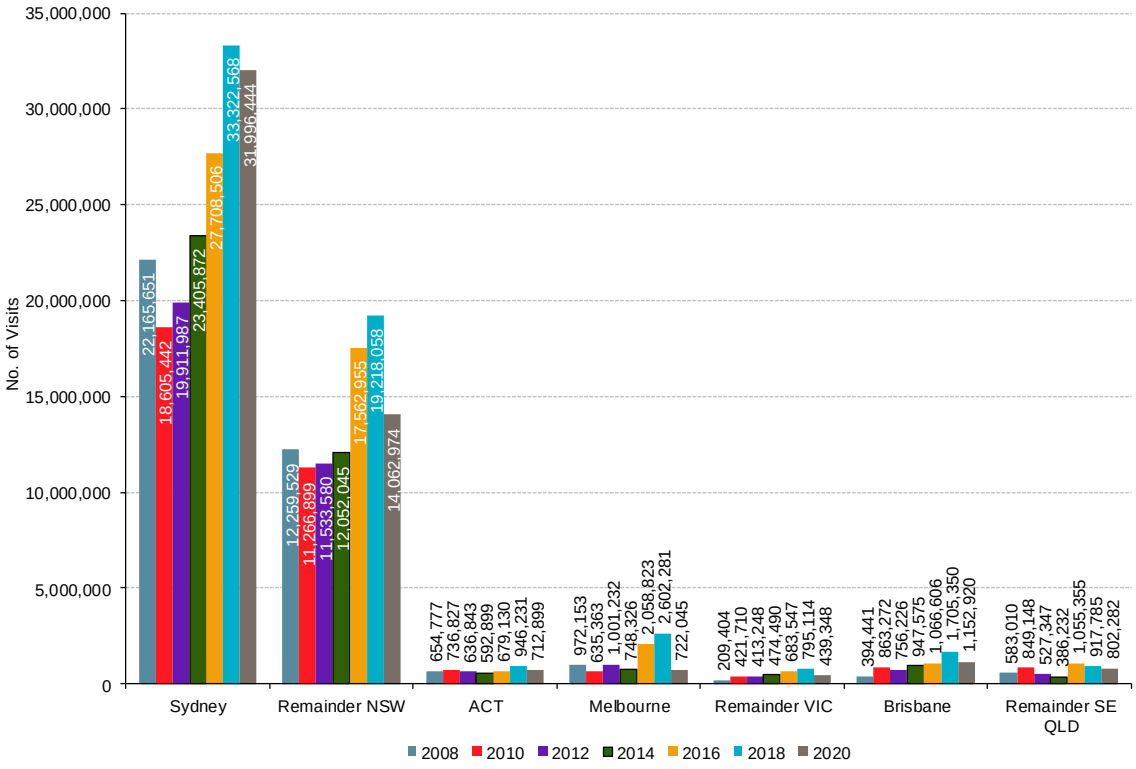
Source: NPWS Parks Visitor Surveys 2008 – 2020
Base: 2008 n=1,563; 2010 n=1,468; 2012 n=1,457; 2014 n=1,667; 2016 n=1,728, 2018 n=1,739; 2020 n=1,178

Significantly lower than 2020 estimate
Significantly higher than 2020 estimate

6.2.4.5 Region of Origin Analysis of Adjusted Visitation Survey Estimates

Chart 6 shows the total number of NPWS park visits by the region of origin of the survey respondent for each survey year. In 2020 the second highest number of visits was recorded for visits from Sydney residents (32.0m) and Brisbane residents (1.2m). Visits from Victoria were low, with the second lowest number of visits from Melbourne residents recorded in 2020 (722K) and the third lowest for remainder Victoria residents (439K). This is primarily the result of COVD-19 restrictions, as detailed in section 7.1 of this report.

Chart 6: Visitation by Region of Origin

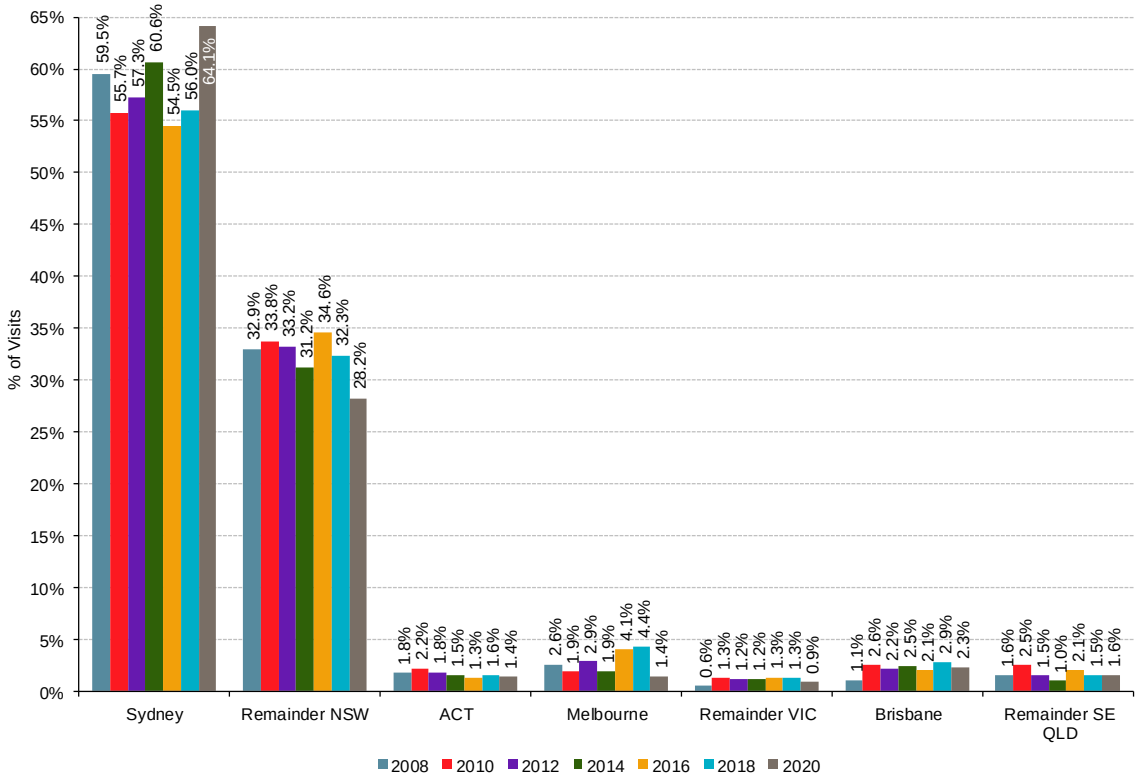


Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=1,563; 2010 n=1,468; 2012 n=1,457; 2014 n=1,667; 2016 n=1,728, 2018 n=1,739; 2020 n=1,178

In terms of percentage contribution to NPWS park visits, Chart 7 shows that 64.1% of all visits in 2020 originated from people living in Sydney, the highest recorded, while 28.2% of visits in 2020 came from those living in other parts of NSW, the lowest recorded. Overall 92.3% of NPWS park visits in 2020 originated from people living within the state of NSW – the highest proportion recorded since 2008 (88.3% - 2018) 89.1% - 2016; 91.8% - 2014 90.5% - 2012; 89.5% - 2010; and 92.4% - 2008).

Interstate visitors in 2020 contributed just 7.7% of all visits to NPWS parks – the second lowest percentage recorded (11.7% - 2018; 10.9% – 2016; 8.1% - 2014; 9.6% - 2012; 10.5% 2010; and 7.6% - 2008). The proportion of visits coming from residents living in Melbourne (1.4%) and remainder Victoria (0.9%) was the lowest ever recorded, with the proportion of visits from the ACT the second lowest recorded (1.45).

Chart 7: Visitation by Region of Origin - % Contribution to Visits



Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=1,563; 2010 n=1,468; 2012 n=1,457; 2014 n=1,667; 2016 n=1,728, 2018 n=1,739; 2020 n=1,178

6.2.5 Annual Visitation, including Non-surveyed Region Estimates

To calculate visitation to NPWS parks for non-surveyed states, Roy Morgan Holiday Tracking Survey (HTS) data is used. In order to calculate non-survey region visitation from survey region visitation, the following information is required:

- % visiting NSW overnight for non-surveyed regions;
- The proportion of NPWS park adult visitors for survey regions compared with the proportion that visited NSW overnight;
- Average number of adult visits to NPWS parks for survey regions; and
- The proportion of NPWS park child visits for survey regions compared with adult visits.

It has been assumed for calculation of estimates that NPWS park visitation from non-surveyed regions will be *no higher* than the incidence rate for the lowest incidence survey region because incidence of overnight visitation to NSW is lower for these regions than it is for Melbourne and Remainder of Victoria. Therefore, the NPWS park visitation calculation for non-surveyed regions is *solely* based on the NPWS park visitation estimate for Victoria as a whole (i.e. the survey regions of Melbourne and Remainder of Victoria combined). By combining the two survey regions, the reliability of the survey estimate for non-surveyed regions improves (as the sample size is larger for the survey region used in creating the estimate) and also caters for visitation to NSW from interstate urban centres, regional centres and rural communities.

This approach is still however, likely to create visitation estimates for these non-survey regions that are marginally higher than would typically be the case, but the incidence of visitation to NSW from these regions is so small, any affect in inflating the overall survey estimate will be minute.

Using the combined information for Victoria as the adjustment factor for non-surveyed regions (converted to HTS estimates), Table 16 shows that a total of 196,325 NPWS park visits were made in 2020 to NPWS parks from these non-surveyed regions (153,955 by adults and 42,370 by children). This number of visits is by far the smallest number recorded from non-survey regions and is primarily caused by the COVID-19 pandemic, with its associated restrictions and border closures limiting access to NSW and parks within NSW.

Table 16: Annual NPWS Park Visitation—Non-Survey Region

Non-Survey Regions NPWSPark Visitation Calculation	Rem QLD	SA	WA	TAS	NT	VIC Survey Estimate
Adult Population (Jan 2020)	1,011,343	1,378,956	2,015,285	423,849	181,628	n/a
Visited PWG Park in last 4 wks						0.63%
% Visited NSW Overnight in last 4 wks	0.74%	0.29%	0.12%	0.08%	0.01%	0.90%
% PWG Visitors to Overnight Visitors	n/a	n/a	n/a	n/a	n/a	70.17%
% Estimate of PWG Visitors	0.52%	0.20%	0.08%	0.06%	0.01%	n/a
No. Adult PWG Visitors per wave	5,251	2,806	1,697	238	13	n/a
Annual Adult PWG Park Visitors	68,268	36,479	22,060	3,093	166	n/a
Average PWG Park Visits per Adult	n/a	n/a	n/a	n/a	n/a	1.18
Annual Adult PWG Park Visits	*80,807*	*43,179*	*26,112*	*3,661*	*196*	*n/a*
% Child to Adult PWG Park visits	n/a	n/a	n/a	n/a	n/a	27.52%
Annual Child PWG Park Visits	*22,239*	*11,883*	*7,186*	*1,008*	*54*	*n/a*
Total Estimated Annual PWG Visits - 2020	**103,046**	**55,062**	**33,298**	**4,669**	**250**	**n/a**
Contribution to Non-Survey Region PWG Park Visitation	***52.5%***	***28.0%***	***17.0%***	***2.4%***	***0.1%***	***n/a***
Total Estimated Annual PWG Visits - 2018	**88,343**	**163,638**	**298,933**	**143,519**	**34,148**	**n/a**
Contribution to Non-Survey Region PWG Park Visitation	***12.1%***	***22.5%***	***41.0%***	***19.7%***	***4.7%***	***n/a***
Total Estimated Annual PWG Visits - 2016	***207,797***	***293,060***	***232,394***	***74,828***	***49,469***	***n/a***
Contribution to Non-Survey Region PWG Park Visitation	***24.2%***	***34.2%***	***27.1%***	***8.7%***	***5.8%***	***n/a***
Total Estimated Annual PWG Visits - 2014	***68,231***	***199,484***	***177,138***	***49,594***	***65,483***	***n/a***
Contribution to Non-Survey Region PWG Park Visitation	***12.2%***	***35.6%***	***31.6%***	***8.9%***	***11.7%***	***n/a***
Total Estimated Annual PWG Visits - 2012	**232,371**	**293,766**	**94,502**	**80,981**	**13,542**	**n/a**
Contribution to Non-Survey Region PWG Park Visitation	***32.5%***	***41.1%***	***13.2%***	***11.3%***	***1.9%***	***n/a***
Total Estimated Annual PWG Visits - 2010	**94,608**	**207,009**	**109,588**	**37,865**	**15,894**	**n/a**
Contribution to Non-Survey Region PWG Park Visitation	***20.3%***	***44.5%***	***23.6%***	***8.1%***	***3.4%***	***n/a***
Total Estimated Annual PWG Visits -2008	**176,917**	**284,948**	**122,889**	**88,304**	**15,593**	**n/a**
Contribution to Non-Survey Region PWG Park Visitation	***25.7%***	***41.4%***	***17.8%***	***12.8%***	***2.3%***	***n/a***

Source: NPWS Parks Visitor Survey 2020 and Roy Morgan Single Source Holiday Tracking Survey 2020
Base: NPWS Parks Visitor Survey 2020 n=1,178; HTS 2020 – n=14,528

Table 17 shows that the overall NPWS park visitation estimate for 2020 is 50,085,238, with adult visits contributing 77% and child visits 23% of all visits. The proportion of visits contributed by adults was slowly declining over time (2008 – 82%; 2010 – 81%; 2012 – 81%; 2014 – 80%; 2017 – 78%; 2018 – 75%), with the marginal increase to 77% in 2020 likely due to COVID-19 restrictions limiting families with children to visit NPWS parks, rather than an actual change in trend. Table 17 also shows that non-survey regions contributed 0.4% each to the final annual adjusted NPWS park visitation estimate, the adult visitation estimate and the child visitation estimate.

While intrastate visitation has been in decline since 2008 (87.2% in 2018; 87.6% in 2016, 90.5% in 2014, 88.6% in 2012, 88.3% in 2010 and 90.8% in 2008), it increased to 92.0% in 2020, most likely due to COIVD-19 restrictions limiting park visits to parks close to one's home from local residents. Overall, the 2020 NPWS park visitation estimate is 16.9% lower than the 2018 estimate of 60.2m and 3.1% lower than the 2016 estimate of 51.7m. The 2020 estimate is 21.3% to 32.4% higher than the 2008 to 2014 estimates.

Table 17: Final Annual NPWS Park Visitation Estimate—Region of Origin (No.)

Final Adjusted Annual NPWS Park Visitation Estimate 2020[1]	Adult Visits No.	Adult Visits %	Child Visits No.	Child Visits %	Total Visits No.	Total Visits %
Sydney	24,643,448	63.94%	7,352,996	63.70%	31,996,444	63.88%
Remainder NSW	10,759,161	27.92%	3,303,813	28.62%	14,062,974	28.08%
ACT	568,640	1.48%	144,258	1.25%	712,899	1.42%
Melbourne	638,612	1.66%	83,432	0.72%	722,045	1.44%
Remainder VIC	272,135	0.71%	167,214	1.45%	439,348	0.88%
Brisbane	876,922	2.28%	275,998	2.39%	1,152,920	2.30%
Remainder SE QLD	628,634	1.63%	173,648	1.50%	802,282	1.60%
Remainder QLD	80,807	0.21%	22,239	0.19%	103,046	0.21%
SA	43,179	0.11%	11,883	0.10%	55,062	0.11%
WA	26,112	0.07%	7,186	0.06%	33,298	0.07%
TAS	3,661	0.01%	1,008	0.01%	4,669	0.01%
NT	196	0.00%	54	0.00%	250	0.00%
Total Australia 2020	**38,541,509**	**100.00%**	**11,543,729**	**100.00%**	**50,085,238**	**100.00%**
Margin of Error[2]	**±3.07%**	**n/a**	**±7.41%**	**n/a**	**±4.07%**	**n/a**
Total Australia 2018	**45,333,817**	**100.00%**	**14,902,192**	**100.00%**	**60,236,009**	**100.00%**
Margin of Error[2]	**±2.61%**	**n/a**	**±6.64%**	**n/a**	**±3.61%**	**n/a**
Total Australia 2016	**40,103,897**	**100.00%**	**11,558,047**	**100.00%**	**51,661,944**	**100.00%**
Margin of Error[2]	**±2.89%**	**n/a**	**±6.24%**	**n/a**	**±3.64%**	**n/a**
Total Australia 2014	**31,674,661**	**100.00%**	**7,761,387**	**100.00%**	**39,436,048**	**100.00%**
Margin of Error[2]	**±2.84%**	**n/a**	**±7.99%**	**n/a**	**±3.85%**	**n/a**
Total Australia 2012	**28,745,337**	**100.00%**	**6,750,287**	**100.00%**	**35,495,625**	**100.00%**
Margin of Error[2]	**±2.90%**	**n/a**	**±8.02%**	**n/a**	**±3.87%**	**n/a**
Total Australia 2010	**27,262,279**	**100.00%**	**6,581,347**	**100.00%**	**33,843,626**	**100.00%**
Margin of Error[2]	**±3.18%**	**n/a**	**±7.44%**	**n/a**	**±4.00%**	**n/a**
Total Australia 2008	**31,128,875**	**100.00%**	**6,798,741**	**100.00%**	**37,927,616**	**100.00%**
Margin of Error[2]	**±3.34%**	**n/a**	**±4.40%**	**n/a**	**±3.54%**	**n/a**

Source: NPWS Parks Visitor Surveys 2008 – 2020 and Roy Morgan Single Source Holiday Tracking Surveys 2008-2020
Base: NPWS Parks Visitor Surveys –- 2008 n=1,563; 2010 n=1,468; 2012 n=1,457; 2014 n=1,667; 2016 n=1,728, 2018 n=1,739; 2020 n=1,178
HTS Surveys – 2008 n = 14,905; 2010 n= 11,827; 2012 n= 13,518; 2014 n= 10,383; 2016 n= 13,467; 2018 n= 11,752' 2020 n=14,528

1. Excludes visits by International visitors.
2. Margin of error based on the 95% confidence level for survey regions only.

6.2.6 Confidence Limits of the Annual Visitation Estimates

The key point to note when calculating the confidence limit of the survey estimate is that adjustments to the estimates for non-response and telescoping have *no effect* on it. The confidence limit relates solely to the estimates derived from the *survey*. Any adjustments to a survey estimate to account for these factors are simply a multiplication of the survey estimate by a constant.

The confidence limits[21] for this study (at the industry accepted 95% confidence level) in 2020 are as follows:

±3.07% Annual Adult Visitation Estimate confidence limit
±7.41% Annual Child Visitation Estimate confidence limit
±4.07% Annual Total Visitation Estimate confidence limit

This result compares to an overall confidence limit of ±3.61% in 2018; ±3.64% in 2016; ±3.85% in 2014; ±3.87% in 2012; ±4.00% in 2010; and ±3.54% in 2008.

NSW residents contributed 92% of NPWS visits to the overall visitation estimate in 2020, so as can be seen in Table 18, the overall confidence limit is driven by the confidence limits attained for Sydney and remainder NSW. Whilst the confidence limits for other survey regions are large, they have minimal effect on the overall visitation estimate confidence level because visitation is so low from these regions.

Table 18: Confidence Limits by Survey Region of Origin[22]

Number of NPWS Park Visits[3]	Sydney	Remainder NSW	ACT	Mel-bourne[2]	Remainder VIC	Brisbane	Remainder SE QLD
Adult Visits Confidence Limit[1]	±3.64%	±6.13%	±19.12%	±14.20%	±18.52%	±13.53%	±14.31%
Child Visits Confidence Limit[1]	±8.79%	±15.00%	±36.23%	±34.82%	±43.50%	±28.30%	±42.40%
Total Visits Confidence Limit[1]	±4.82%	±8.21%	±22.58%	±16.58%	±28.03%	±17.07%	±20.39%

Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=1,563; 2010 n=1,468; 2012 n=1,457; 2014 n=1,667; 2016 n=1,728, 2018 n=1,739; 2020 n=1,178

1. 95% confidence level.
2. Confidence limits of Australian regions not surveyed in 2020 (i.e. SA, WA, Tasmania, NT and remainder SE QLD) will be the same as the combined limit for Melbourne and remainder VIC (11.32% adult visits; 31.97% child visits; 15.78% total visits), as their estimation of PWG park visitation was based on the Victorian estimate.
3. The confidence limits for the seven survey regions as a whole in 2020 are ±3.04% adult visits; ±7.32% child visits; and ±4.03% total visits.

[21] The Mean, Standard Error of Mean and Confidence Limits on Mean for NPWS adult and child park visits have been calculated using the EXAMINE function in SPSS. SPSS uses the following formula for the Confidence Interval for the Mean:

Lower bound = $\bar{y} - t_{\alpha/2}$, *W*-1 SE Upper bound = $\bar{y} + t_{\alpha/2}$, *W*-1 SE

where SE is the standard error and W is the total sum of weights. (approximates to 1.96 due to the sample size).

The % figures for the Confidence Limits on Mean are calculated within EXCEL. The formula used to calculate the % figures is: Absolute value of (CI – Mean)/Mean – as a percentage.

[22] The confidence limits for the overall visitation estimate in 2018, including non-survey regions are ±2.61% adult visits; ±6.64% child visits; and ±3.61% total visits.

The confidence limits for overall visitation per survey wave in 2020 ranges between ±10.40% (wave 9 - 21 July to 21 August 2020) and ±17.41% (wave 8 - 23 June to-23 July 2020) (see Table 19).

Table 19: Confidence Limits by Survey Wave[23]

No. NPWS Park Visits	Adult Visits Confidence Limit[1]	Child Visits Confidence Limit[1]	Total Visits Confidence Limit[1]
Wave 1	±10.04%	±12.12%	±10.45%
Wave 2	±8.79%	±17.99%	±11.86%
Wave 3	±9.57%	±24.49%	±12.11%
Wave 4	±10.72%	±17.52%	±11.98%
Wave 5	±12.74%	±25.27%	±14.43%
Wave 6	±11.54%	±30.12%	±13.79%
Wave 7	±9.65%	±19.51%	±11.11%
Wave 8	±10.57%	±35.99%	±17.41%
Wave 9	±8.92%	±15.18%	±10.40%
Wave 10	±11.91%	±21.60%	±14.58%
Wave 11	±9.16%	±20.58%	±11.94%
Wave 12	±10.00%	±29.76%	±15.66%
Wave 13	±14.15%	±27.67%	±17.40%
Total 2020	**±3.04%**	**±7.32%**	**±4.03%**

Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=1,563; 2010 n=1,468; 2012 n=1,457; 2014 n=1,667; 2016 n=1,728, 2018 n=1,739; 2020 n= 1,178

1. 95% confidence level for survey estimates only (excludes non-survey estimates).

Please note that hereafter, charts showing NPWS park visitation by wave only include margins of error (i.e. the confidence limit) at the overall state level. Graphs for sub-segments (e.g. regions of origin, NPWS branch etc.) have smaller sample sizes, and consequently large margins of error. For these graphs margins of error are not displayed. Where relevant, commentary has been made to alert readers to potentially large errors and cautions with interpreting data.

6.3 Visitation by Park Operations Branch

NSW NPWS went through a comprehensive restructure known as Future NPWS from late 2016 to early 2019. The restructure had a wide scope and included design, development, testing and extensive internal consultation on initiatives and changes to operations, programs, staffing, structure and administrative areas. Amongst these changes the one which is most relevant for Park Visitor Survey reporting and analysis is changes to administrative areas. In particular, the boundary based definitions of the 8 Branches and 37 Areas which are the foundation of the operational structure of NPWS.

The Park Visitor Survey captures data on visitation to individual parks. For reporting purposes these parks are aggregated to specific Branches which are the lowest level of the NPWS structure for which some results can be reliably reported. The Branch definitions used for the 2018 Park Visitor Survey were based on the new Branch and Area structure. The full database (2008-2018) was updated to reflect the new definitions. The 2020 survey also incorporates these changes.

[23] 95% confidence level for survey estimates only (excludes non-survey estimates).

NPWS Branch was allocated to each respondent visiting a NPWS park based on (a) the name of the park; and (b) the name of the nearest town as specified by each respondent's survey responses. Where a respondent could not provide the name of the park, nor its nearest town, the park could not be classified to a NPWS Branch or Region. This occurred for 4% of visits in 2020 (2% of visits in 2018, 2% of visits in 2016, 4% of visits in 2014, 9% of visits in 2012 and 7% of visits in each of 2008 and 2010 - Chart 9).

Please note that wave-by-wave analysis of visitation by Branch, whilst presented in this report, is subject to large sampling errors. As a consequence, seasonal fluctuations in visitation should be treated as indicative and any conclusions made treated with caution.

6.3.1 Annual Visitation by NPWS Branch

In relation to absolute numbers, Chart 8 shows that in 2020, visits to parks declined from 2018 levels in all eight Branches.

Visits to parks in the *Greater Sydney Branch* only fell marginally from 19.7m in 2018 to 19.6m in 2020 (Chart 8). This can primarily be attributed the highest level of visits attained for Lane Cove (2.7m), Kamay Botany Bay (1.8m) and Georges River National Parks (1.2m), while visits to Royal (5.3m), Ku-ring-gai Chase (3.1m) and Sydney Harbour National Parks (2.2m) did not decline markedly from their 2018 peak.

NPWS visits to parks in the *North Coast Branch* decreased from 7.3m visits in 2018 to 5.4m visits in 2020. While the highest number of visits was observed in 2020 for Hat Head National Park (489K), declines in visits from 2018 levels were found for Cape Byron (378K), Yuraygir (329K) Crowdy Bay (311K) and Bundjalung National Parks (291K).

Visits to *Hunter Central Coast Branch* parks only decreased marginally from 8.3m in 2018 to 8.2m in 2020. While declines in visits from 2018 were observed for Glenrock (773K), Brisbane Water (469K); Tomaree (348K) and Myall Lakes National Parks in 2020 (326K), increases in visits to Bouddi (1.4m) and Booti Booti National Parks (903K) almost offset these declines.

Visits to the *Blue Mountains Branch* declined from 9.6m visits in 2018 to 7.2m visits in 2020. This decline can almost solely be attributed to the decline in visits to Blue Mountains National Park from 8.4m visits in 2018 to 6.2m visits in 2020.

Visits to parks in the *South Coast Branch* declined from 6.4m visits in 2018 to 3.9m visits in 2020. The decrease in visitation was not due to declines in visits to major parks in the Branch, with Eurobodalla (913K), Morton (655K) and Murramarang National Parks (374K) all recording increased visits in 2020. Rather the decline was driven by declines in visitation to other parks in the Branch, such as Budderoo (263K), Mimosa Rocks (194K) and Ben Boyd National Parks (183K).

Visits to parks in the *Southern Ranges Branch* decreased from 3.6m visits in 2018 to 2.0m visits in 2020. This is primarily due to declines in visits to Kosciuszko National Park, from 3.3M visits in 2018 to 1.5M in 2020.

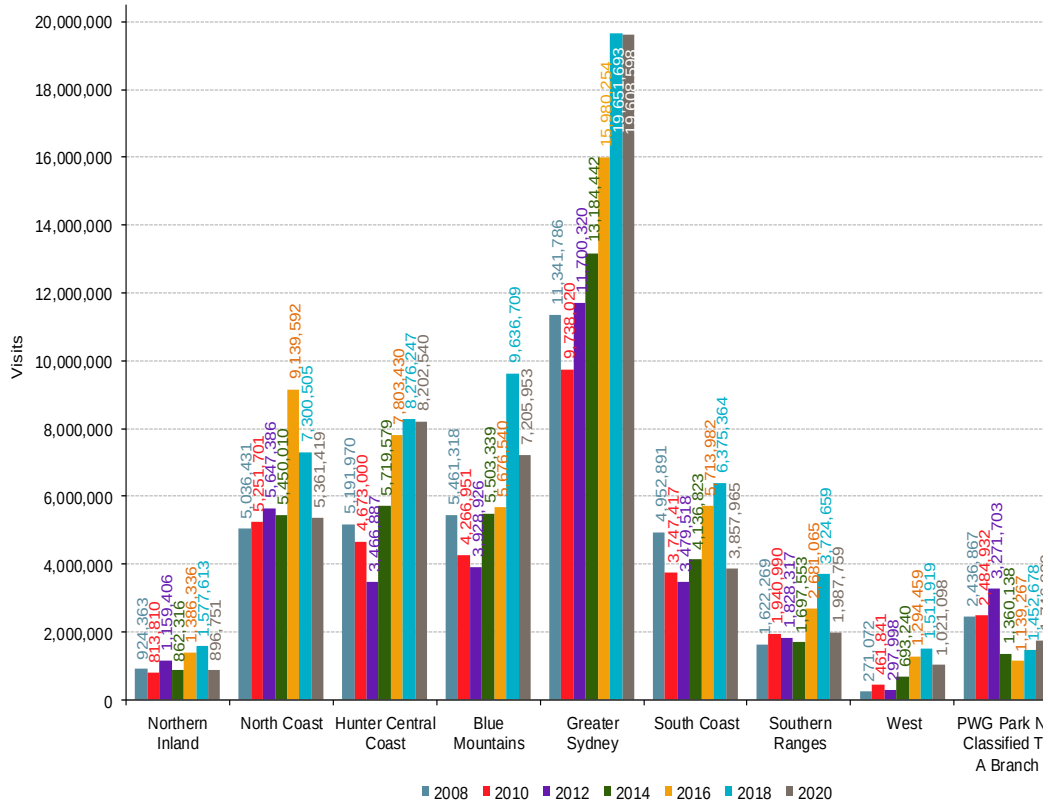
A decline in visits was observed for parks in the *Northern Inland Branch*, with visitation falling from 1.9m in 2018 to 0.9m in 2020. Visits are spread over a large number of parks for this Branch, with

declines in visits observed for the majority. Only visits to Warrumbungle National Park increased in 2020 (to 467K).

Visits to the *West Branch* declined from 1.2m in 2018 to 1.0m in 2020. This can almost solely be attributed to the decline in visits to Murray Valley National Park from 839K in 2018 to 663K in 2020.

For more detail on visitation to selected NPWS parks refer to section 6.3.2 of this report.

Chart 8: NPWS Annual Visitation by NPWS Branch

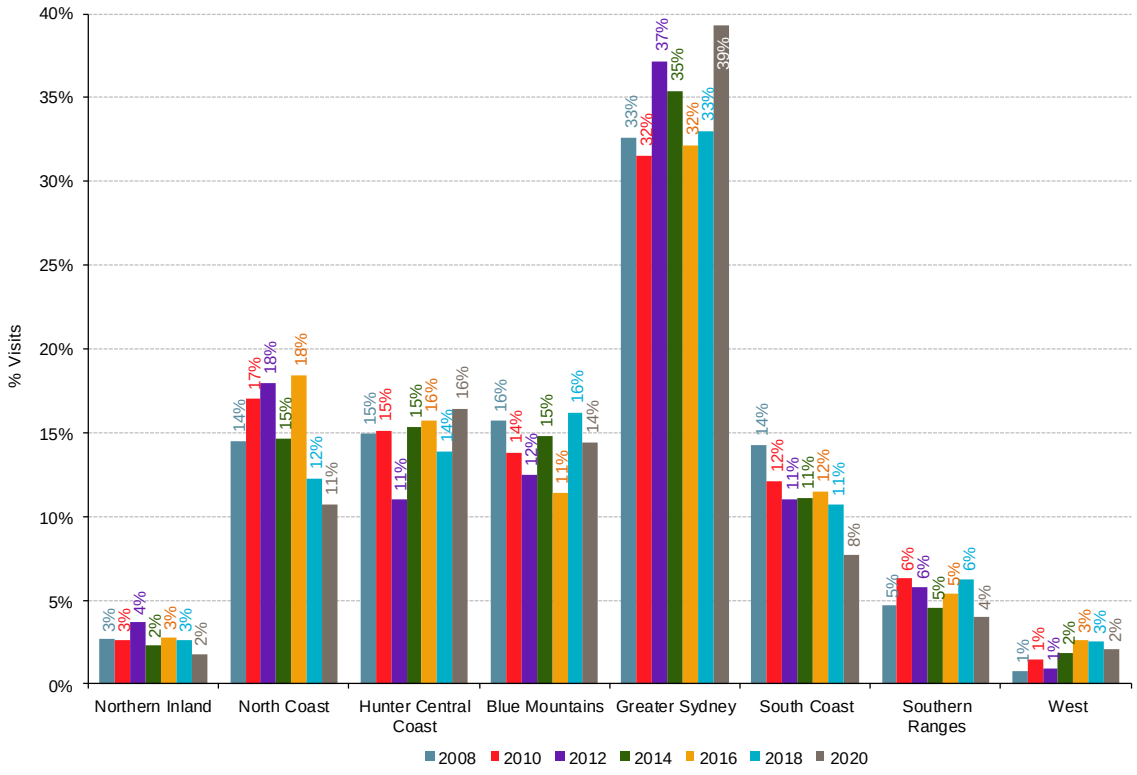


Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=1,563; 2010 n=1,468; 2012 n=1,457; 2014 n=1,667; 2016 n=1,728, 2018 n=1,739; 2020 n=1,178

When comparing the proportional contribution to total NPWS park visits of the eight NPWS Branches (Chart 9), the contribution to overall visits from the *Greater Sydney Branch* increased from 33% in 2018 to 39% in 2020 – the highest proportional contribution obtained. Increases in proportional contribution to park visits from 2018 to 2020 were also observed for the *Hunter Central Coast Branch* from 14% to 16%).

The proportional contribution to total NPWS park visits of all other Branches decreased from 2018 levels in 2020. The most notable decline was observed for the *South Coast Branch*, which fell from 11% in 2018 to 8% in 2020, the lowest proportion recorded for this Branch. However, lowest proportional contributions were also observed for the *Northern Inland* (2%), *North Coast* (11%) and *Southern Ranges* Branches (4%) in 2020.

Chart 9: Proportional NPWS Annual Visitation by NPWS Branch



Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=1,563; 2010 n=1,468; 2012 n=1,457; 2014 n=1,667; 2016 n=1,728, 2018 n=1,739; 2020 n= 1,178

The following commentary provides comparative analysis of visitation to NPWS Branches from 2008 to 2020 by wave. Please refer to Charts 10 to 17 for more detail.

Please note that hereafter, charts showing NPWS park visitation by wave only include margins of error (i.e. the confidence limit) at the overall state level. Graphs for sub-segments (e.g. regions of origin, NPWS branch etc.) have smaller sample sizes, and consequently large margins of error. For these graphs margins of error are not displayed. As a consequence, seasonal fluctuations in visitation should be treated as indicative and any conclusions made treated with caution. Where relevant, commentary has been made to alert readers to potentially large errors and cautions with interpreting data.

Greater Sydney Branch – Visitation to NPWS parks in the Greater Sydney Branch was the highest recorded in 2020 in waves 2 and 3 (January and February) and in wave to 11 (mid-September to mid-October – winter and spring school holidays). Visitation was the lowest recorded in wave 6 (May 2020). Increases in visitation from 2018 levels were observed for waves 1 to 3 (summer 2019-2020) and waves 11-13 (spring 2020).

North Coast Branch – The cyclical trend in the visitation pattern to North Coast Branch parks over time of being high in early-mid-summer (December-January), mid-Autumn (April), mid-Winter (July-August) and mid-spring (mid-September to mid-October) was not observed in 2020. Visitation was the highest recorded in 2020 for wave 1 (December 2019), wave 8 (mid-winter) and waves 10 to 12 (late winter to mid-spring). The lowest levels of visitation were observed for waves 5 and 6 (March-April) in 2020.

Hunter Central Coast Branch – Similar to the North Coast Branch, Hunter Central Coast visits tend to be cyclical, being high in early-mid-summer (December-January) and mid-Autumn (April), while the peak in winter is earlier (June) and the peak in Spring later (mid-October-mid-November). However, this trend was not generally observed in 2020. Visitation was the highest recorded in wave 1 (December 2019), wave 8 (mid-winter) and waves 10 to 12 (late winter to mid-spring). The lowest ever levels of visitation observed were found in waves 5 and 6 (March-April) of 2020.

Blue Mountains Branch – Visitation to parks in the Blue Mountains Branch generally tends to be stable across the course of the year, with minor peaks in visitation in December, February, May and mid-July-mid August). For 2020 these trends were not as evident with the lowest levels of visitation were recorded in waves 5 and 6 (April-May) and wave 8 (July). Visitation was the highest recorded in spring 2020 (waves 11 to 13).

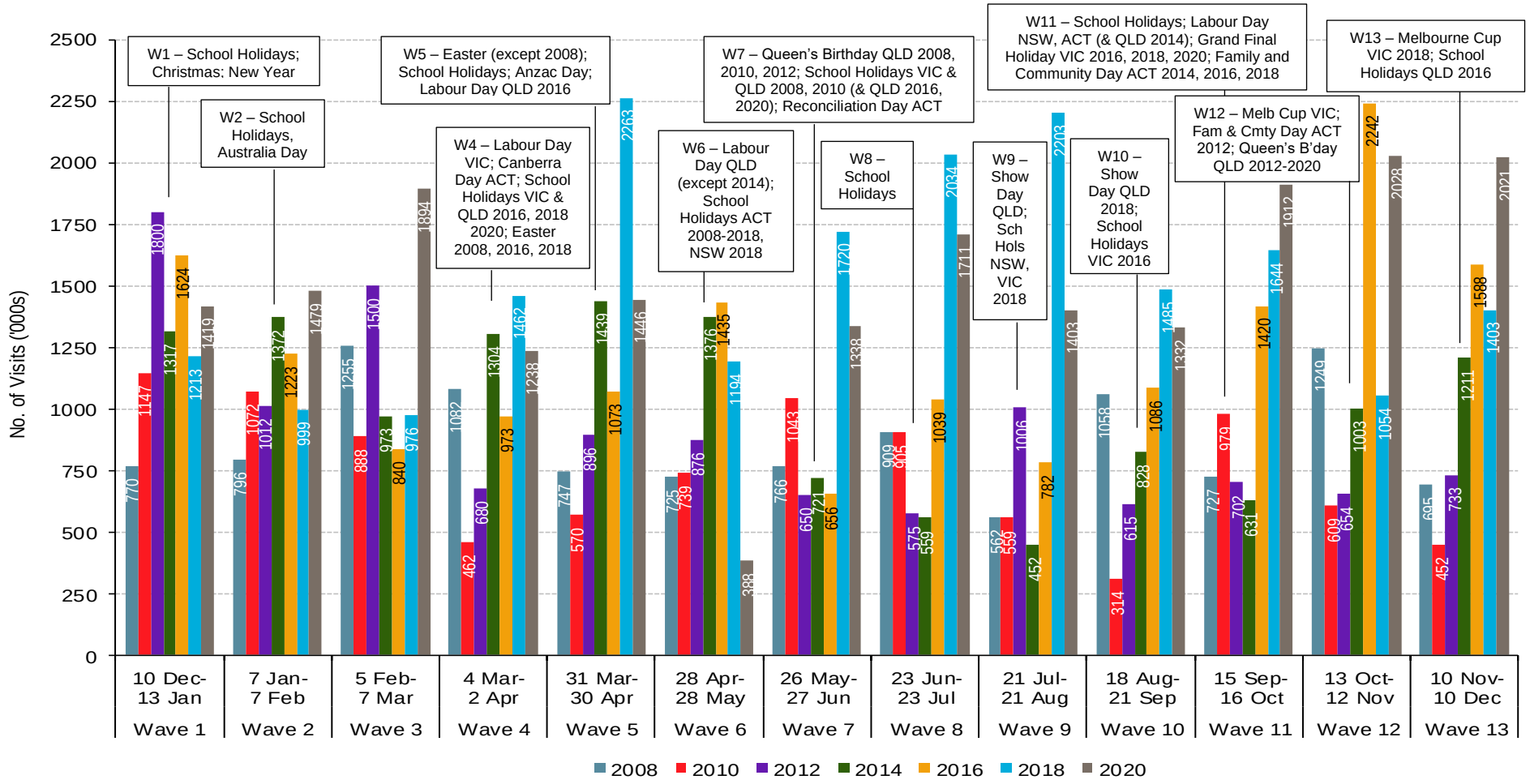
South Coast Branch – As a general trend, visitation to parks in the South Coast Branch tends to peak in waves 1 and 2 (December-January during the summer holidays) and decline to low levels of visitation in wave 12 (mid-October-mid-November) and then increase to the peak in summer. This is not surprising as people tend to head to the South Coast in summer and escape the heat. In 2020 however, the lowest levels of visitation were recorded in waves 1 and 2 (early-mid-summer due to bushfire impact) and waves 4 and 6 (March and May, due to COVID-19 impact). The highest level of visitation was recorded for wave 3 2020 (February).

Southern Ranges Branch – Visitation to parks in the Southern Ranges Branch tends to peak from wave 8 to wave 11 (mid-June to mid-October), which coincides with the snow season. There also appears to be a smaller peak in wave 3 (February), but this peak is influenced heavily by large visitation numbers in that wave in 2010 and 2012, while visitation in other years has been very low in that wave. For 2020, visitation declined from 2018 levels for all waves except wave 6 (April) and waves 8 and 9 (July-August) and only the wave 8 increase was marked (most likely snow sport driven).

Northern Inland Branch – On average, only 6 respondents claim to visit parks in the Northern Inland Branch each wave, so visitation estimates per wave are subject to large error and should be treated with caution. That stated, visitation tends to peak in the Northern Inland Branch in wave 1 (December), wave 5 (April) and wave 11 (mid-September-mid October) in line with school holidays. However, in 2020 the lowest levels of visitation were recorded in waves 1 and 2 (early-mid-summer) most likely due to bushfires, wave 9 (July) and waves 12 and 13 (mid-late spring). The highest level of visitation was recorded for wave 8 (June) 2020.

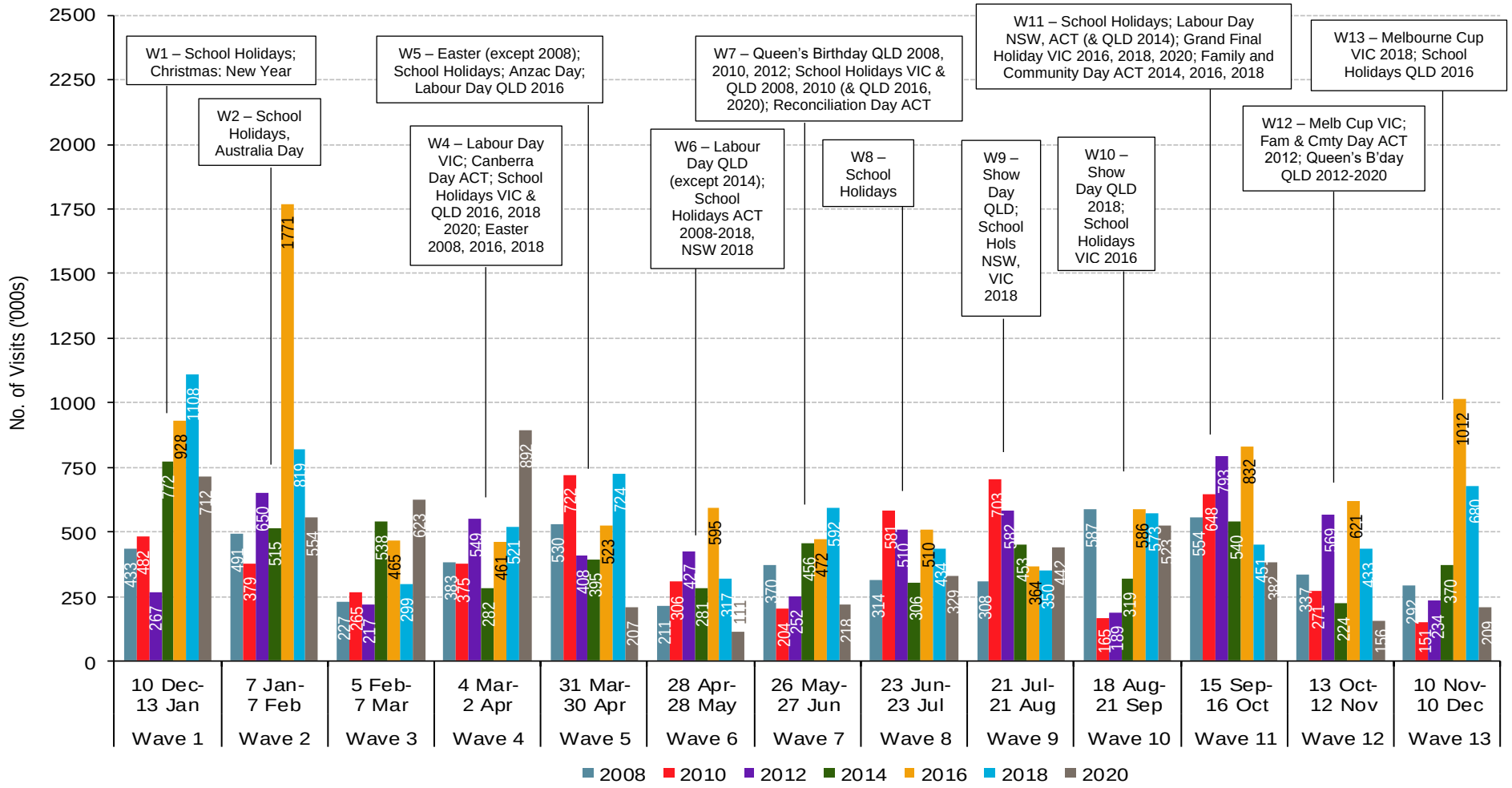
Western Branch – On average, only 2 to 3 respondents claim to visit parks in the West Branch each wave, so visitation estimates per wave are subject to significantly large error and should be treated with extreme caution. No visits were recorded to the West Branch in wave 5 of 2020 (March) and only 3,000 visits were recorded in wave 12 (mid-October-mid-November), the lowest levels recorded. The highest level of visits was recorded in wave 11 of 2020 (mid-September-mid-October), registering 369,000 visits.

Chart 10: Greater Sydney Branch Visitation by Survey Wave—2008-2020



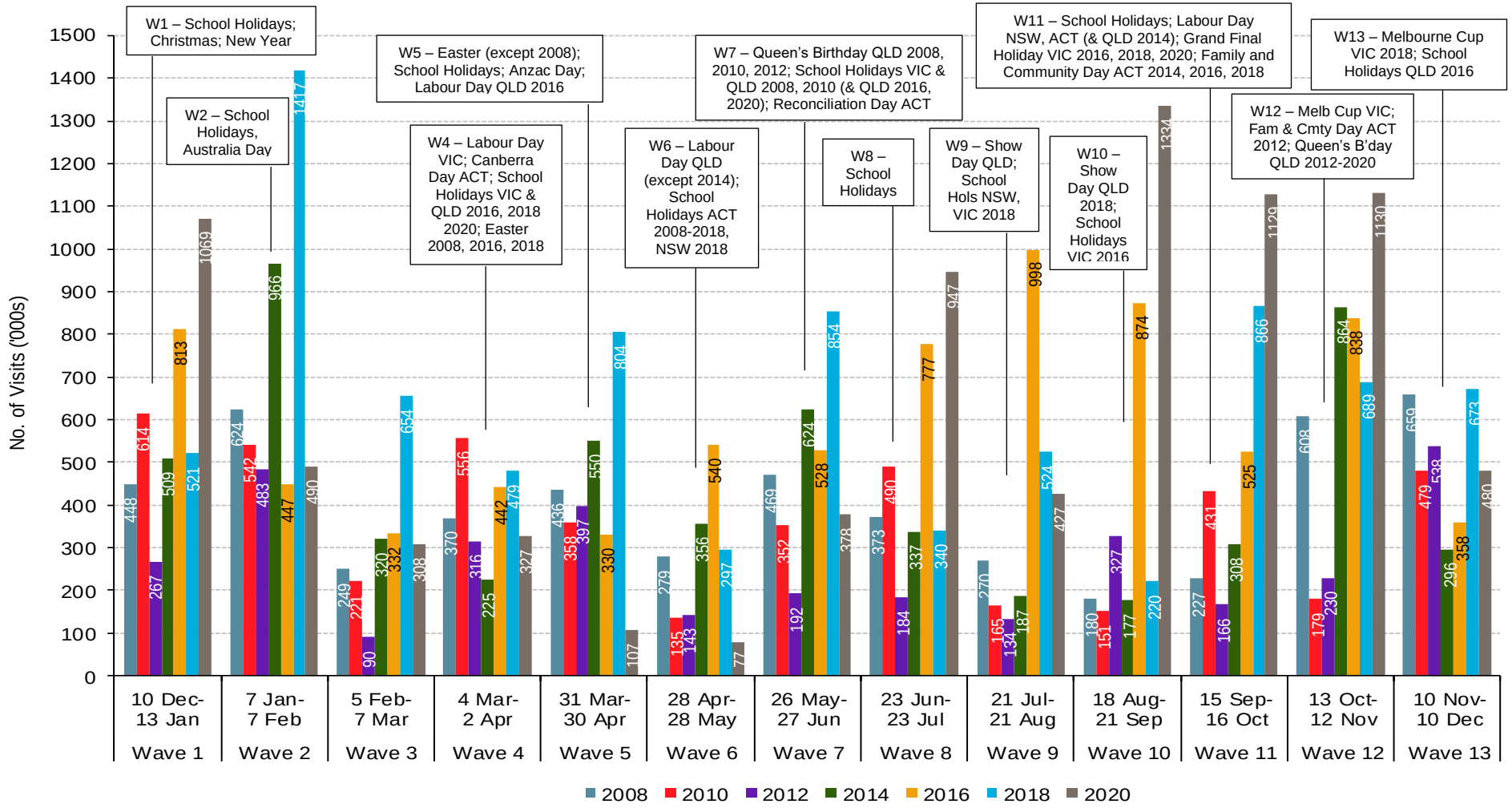
Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=513; 2010 n=470; 2012 n=519; 2014 n=567; 2016 n=618, 2018 n=647; 2020 n=463

Chart 11: North Coast Branch Visitation by Survey Wave—2008-2020



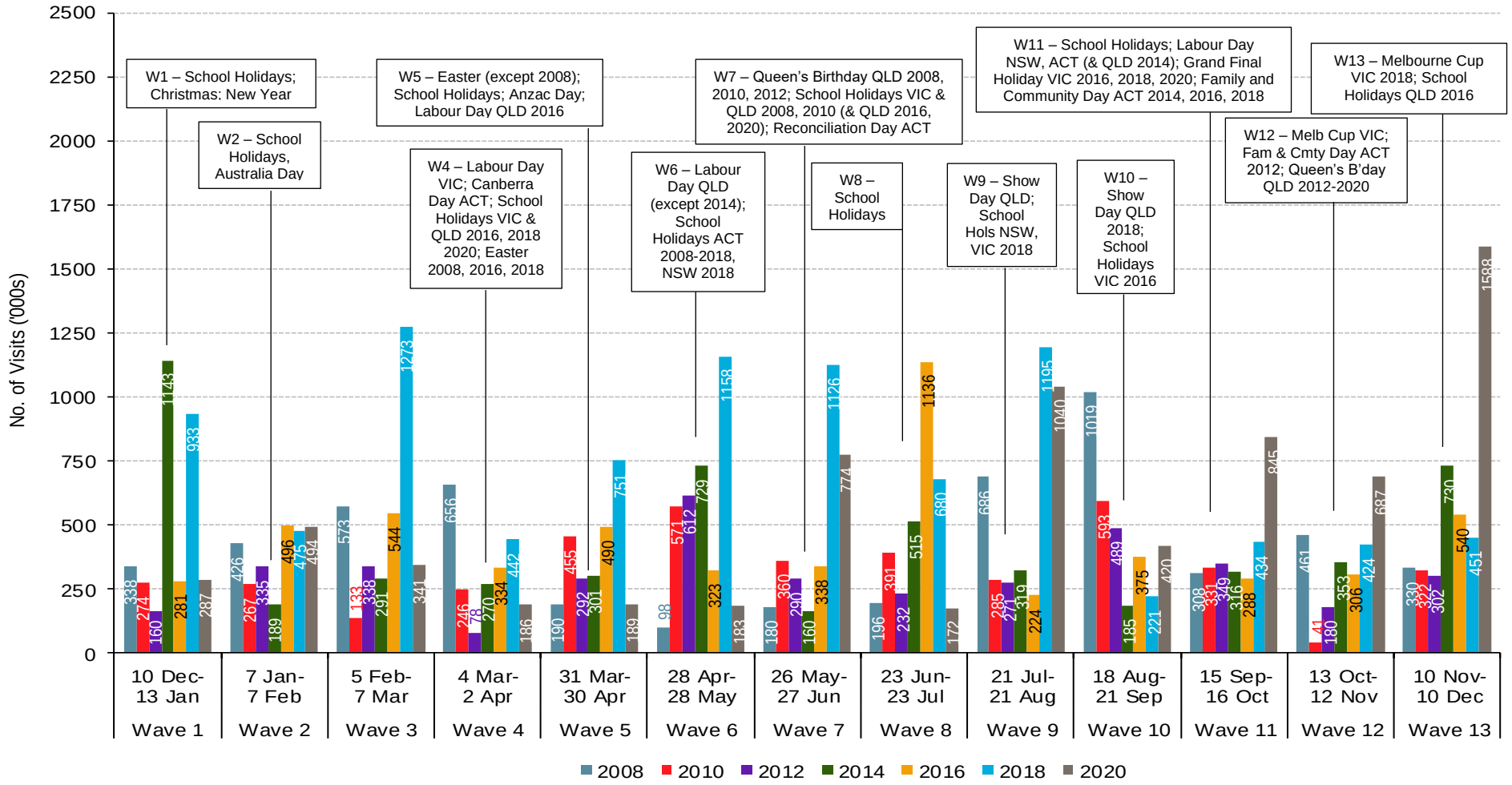
Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=297; 2010 n=280; 2012 n=257; 2014 n=309; 2016 n=332, 2018 n=301; 2020 n=197

Chart 12: Hunter Central Coast Branch Visitation by Survey Wave—2008-2020



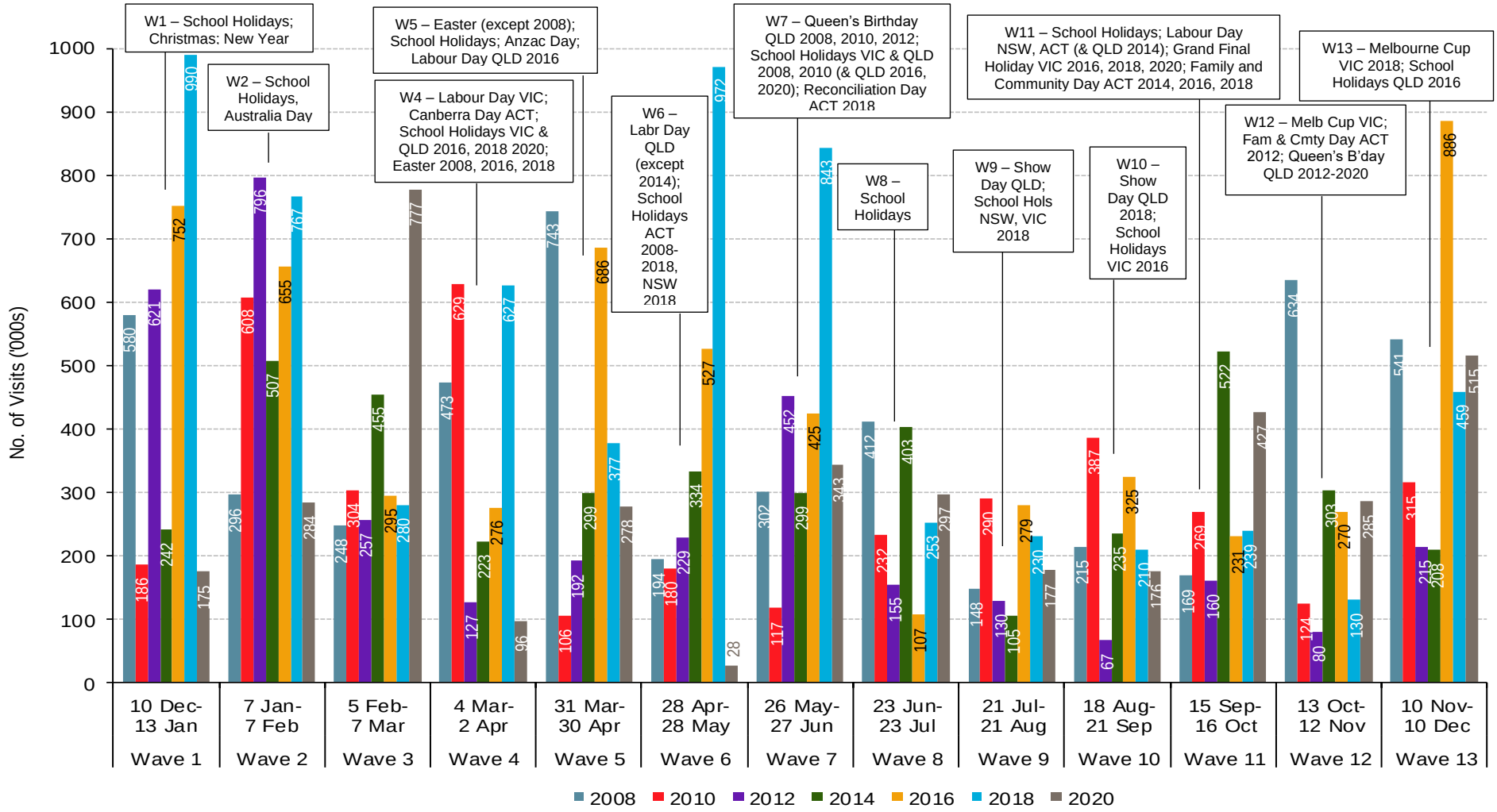
Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=211; 2010 n=204; 2012 n=177; 2014 n=242; 2016 n=223, 2018 n=265; 2020 n=175

Chart 13: Blue Mountains Branch Visitation by Survey Wave—2008-2020



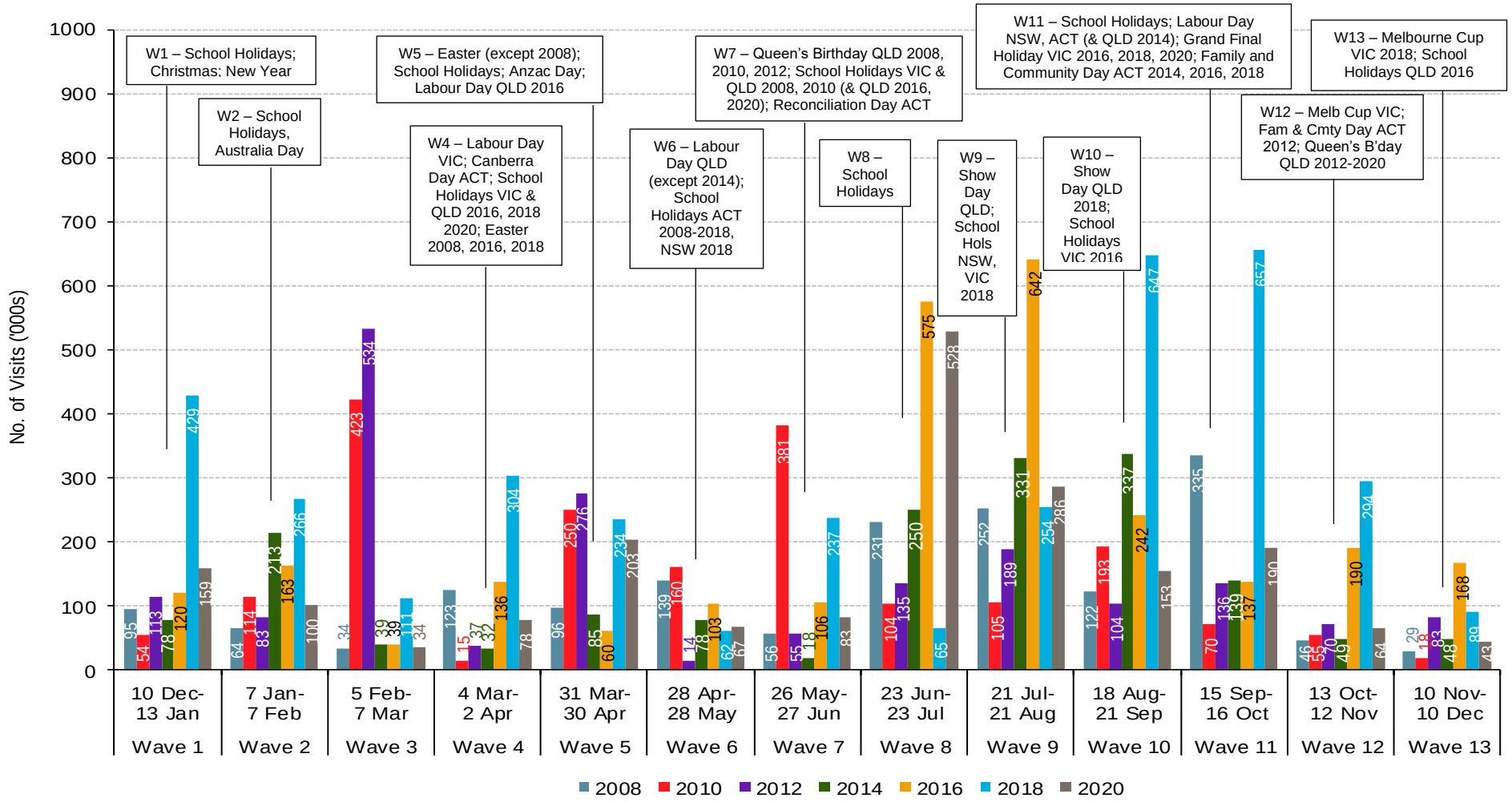
Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=201; 2010 n=187; 2012 n=185; 2014 n=228; 2016 n=223, 2018 n=219; 2020 n=167

Chart 14: South Coast Branch Visitation by Survey Wave—2008-2020



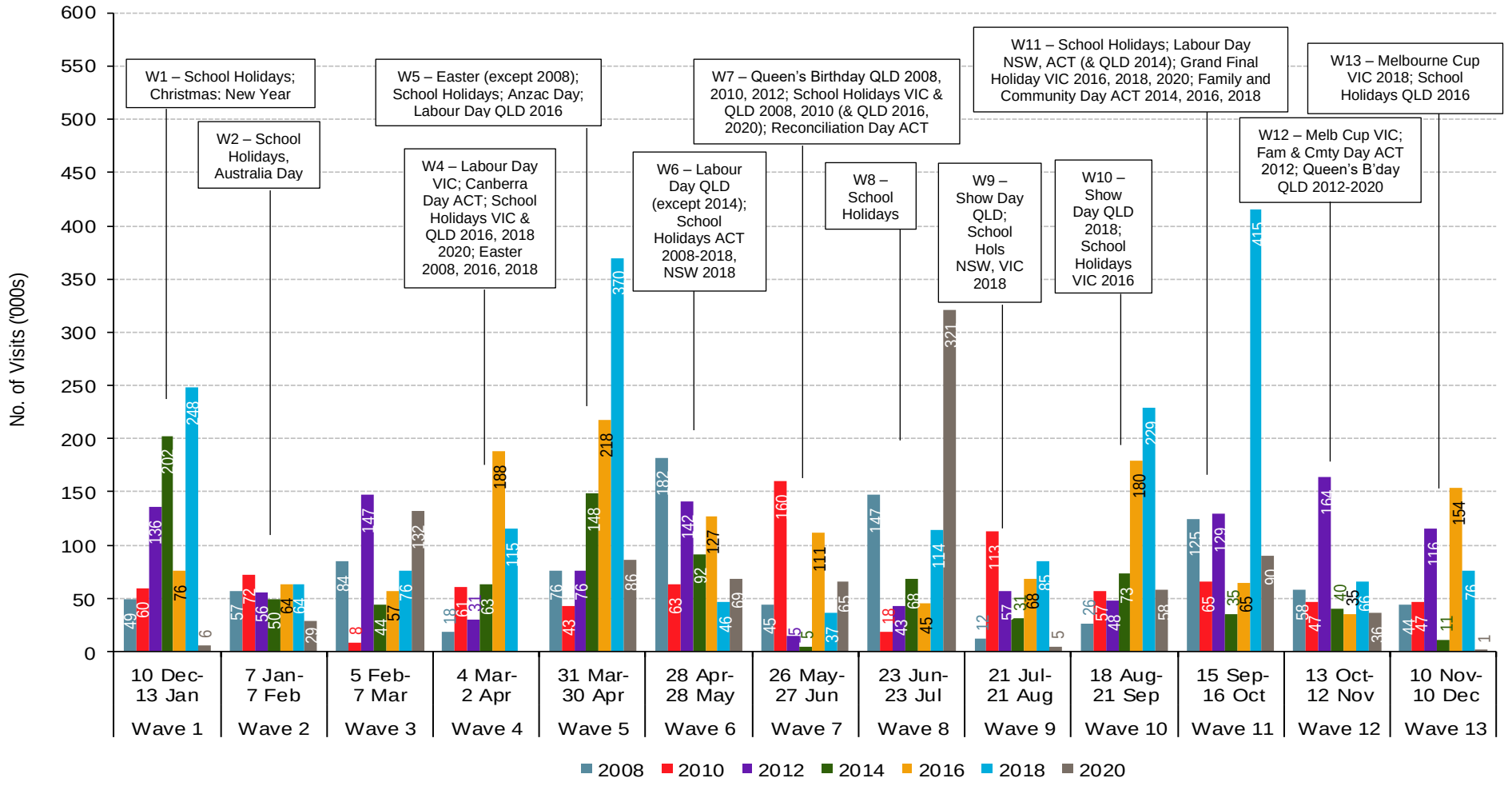
Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=305; 2010 n=250; 2012 n=256; 2014 n=322; 2016 n=279, 2018 n=269; n=192

Chart 15: Southern Ranges Branch Visitation by Survey Wave—2008-2020



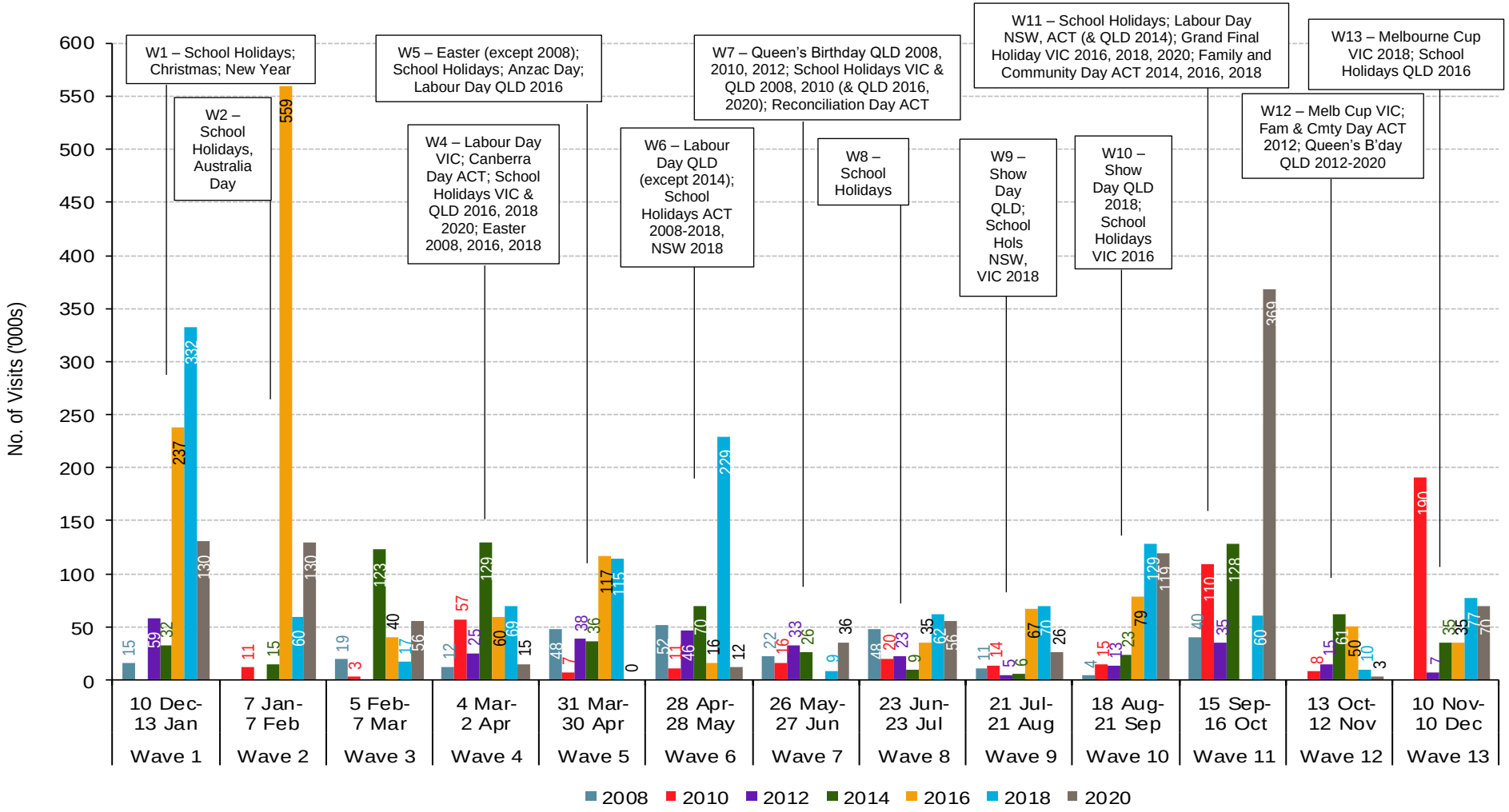
Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=145; 2010 n=145; 2012 n=143; 2014 n=167; 2016 n=185, 2018 n=169; 2020 n=100

Chart 16: Northern Inland Branch Visitation by Survey Wave—2008-2020



Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=77; 2010 n=65; 2012 n=82; 2014 n=79; 2016 n=87, 2018 n=93; 2020 n=43– Caution, small sample size for 2020

Chart 17: West Branch Visitation by Survey Wave—2008-2020



Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=23; 2010 n=25; 2012 n=31; 2014 n=41; 2016 n=44, 2018 n=51; 2020 n=42– Caution, small sample sizes

6.3.2 Visitation to Selected NPWS Parks

Please note that visitation results by NPWS park are subject to significant error and so any comparison of visitation between survey years should be treated with caution. Results have been presented graphically in Chart 18 and Chart 19 to provide an indication of actual park visitation to individual parks over time.

In terms of the highest number of visits, *Blue Mountains National Park* 6.2m visits) has maintained the top position in 2020 from Royal National Park (5.3m visits). From 2008 to 2010, visitation to Blue Mountains National Park was in decline (from 3.6m visits to 3.1m), but it has since successively broken visitation records in 2014, 2016 and 2018. The reason for the decline in visits in 2020 is primarily due to the bushfires that impacted the vast majority of the park from December 2019 to February 2020.

Visits to *Royal National Park* have been increasing in recent survey years (2014 to 2018), but declined in 2020, most likely due to COVID-19 restrictions impacting on overall park visits.

From 2008 to 2012 visitation to *Ku-ring-gai Chase National Park* was steadily increasing, but in 2014 visitation declined to 2010 levels. However in 2016 and 2018, record levels of visitation were recorded. In 2020, visits declined to 3.1m visits from the peak of 3.9m visits in 2018, again most likely due to COIVD-19 restrictions.

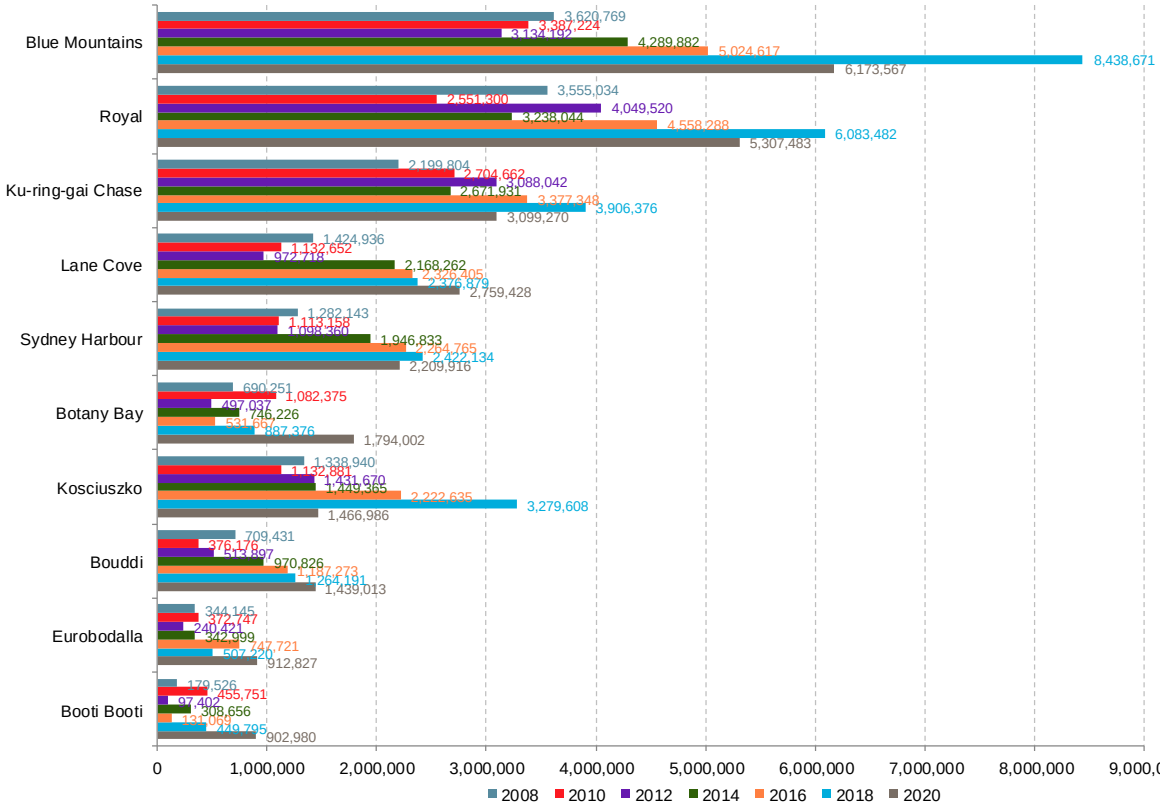
From 2008 to 2012 visitation to *Sydney Harbour* and *Lane Cove* National Parks had been on the decline. However, in 2014 visitation to both parks broke visitation records, which have since been broken in 2016 and again in 2018 (2.4m each in 2018). In 2020, visits to Lane Cove National park increased to 2.8m, while in visitation declined for Sydney Harbour National Park (to 2.2m visits). Increases in visits to *Kamay Botany Bay* National park were observed in 2020, attaining 1.8m visits.

Apart from a slight fall in visitation in 2010, the number of visits made to *Kosciuszko National Park* has remained relatively constant over time. However, in 2016 and 2018 visits increased markedly (to 2.2m and 3.3m respectively). In 2020, visits returned to 2008-2014 levels (1.5m), most likely due to the negative impact of bushfires and COVID-19 border restrictions.

These seven parks tend to record the highest number of visits in any given year, with the remaining parks in the top ten varying from year to year. This is because the number of respondents visiting each of these seven parks each year is statistically robust (ranging from n=30 up to n=250), while the number of respondents visiting each of the three remaining parks each year is not so statistically robust (i.e. under n=30 respondents). Visitation estimates for parks with fewer than 30 respondents should be treated with great caution and regarded as indicative, rather than precise. In this respect it must be noted that visitation estimates for these parks will vary markedly from year to year due to small sample sizes. For example, *Wyrrabalong* and *Georges River* National Parks had 10 respondents each recording visits in 2020 which would lead to an estimate of 1.6m and 1.2m visits respectively. Technically this could have placed these parks in the top 10 for 2020, however, they were excluded due to small sample sizes.

In 2020, – *Bouddi* (1.4m), *Eurobodalla* (0.9m) and *Booti Booti* National Parks (0.9m), with more robust sample sizes, placed eighth to tenth in terms of total visits made.

Chart 18: Annual Visitation for Selected Parks—Parks 1-10



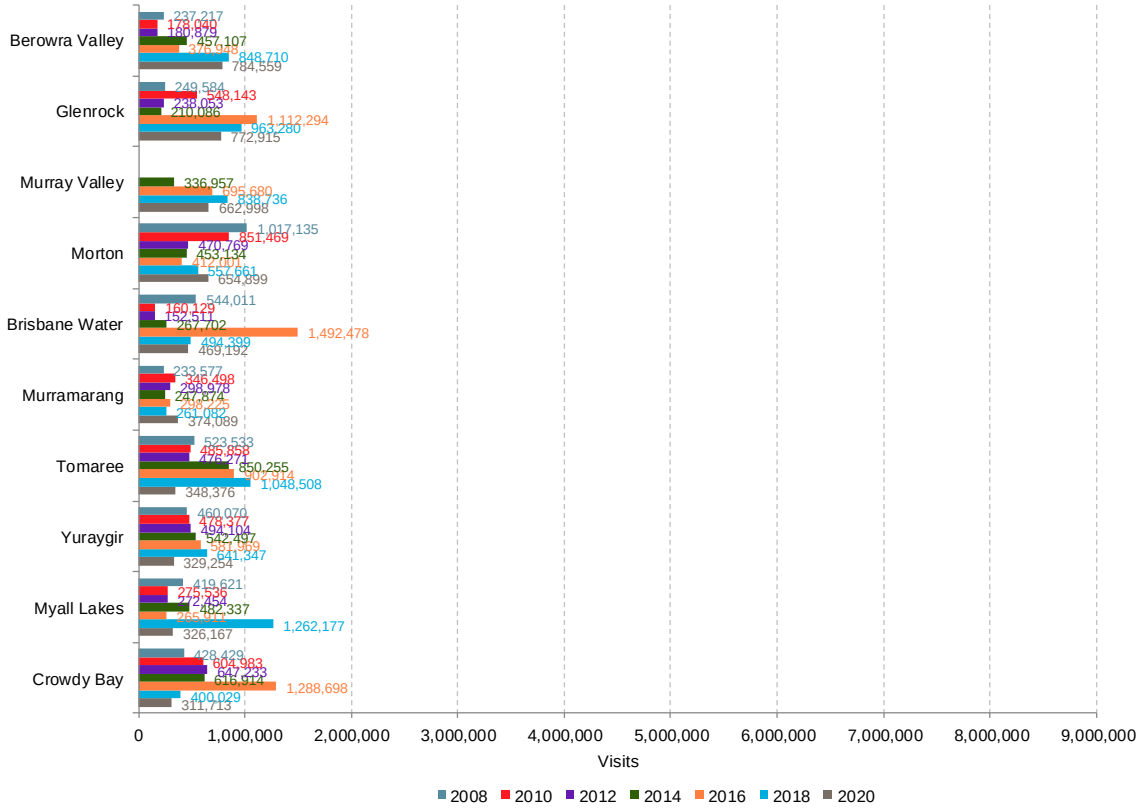
Caution: Small sample sizes for Botany Bay, Bouddi, Eurobodalla Lakes and Booti Booti (n<30)
Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=1,563; 2010 n=1,468; 2012 n=1,457; 2014 n=1,667; 2016 n=1,728, 2018 n=1,739; 2020 n= 1,178

For parks ranked 11 to 20, estimates of number of visits should be treated with significant caution due to small samples sizes. As can be seen in Chart 19 visitation *Berowra Valley National Park* was ranked eleventh with 785K visits, a similar result to that observed in 2018 (849K). *Glenrock National Park* indicatively experienced a sharp rise in visitation in 2016 to 1.1m visits, which declined in 2020 to 773K visits. Since it was added to the NPWS estate and park visits recorded *Murray Valley National Park* increased visits per year from 337K in 2017 to 839K in 2018. A decline back to 2016 levels was observed in 2020 (663K visits), most likely because of COVID-19 based state border closures.

Brisbane Water, Tomaree and *Yuraygir* National Parks tend to be regularly listed in the top 20 visited parks, with all showing declines in visits in 2020 (469K, 348K and 329K respectively). *Morton* National Park also regularly ranks in the top 20, but visits increased to 655K in 2020.

Murramarang National Park tends to have visitation numbers between 230K and 350K per year. In 2020 a slight increase was observed to 374K visits. Myall Lakes (326K) and Crowdy Bay (312K) closed out the top 20 parks.

Chart 19: Annual Visitation for Selected Parks—Parks 11-20



Caution: Small sample sizes for all parks (n<30)
Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=1,563; 2010 n=1,468; 2012 n=1,457; 2014 n=1,667; 2016 n=1,728, 2018 n=1,739; 2020 n= 1,178

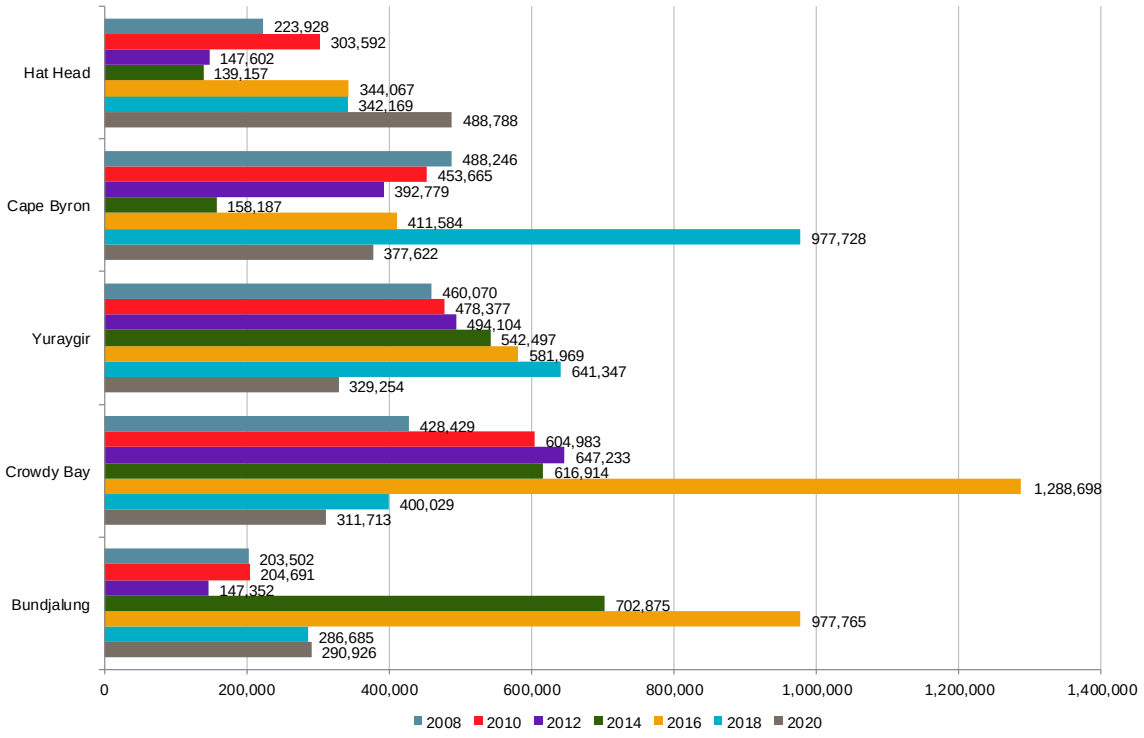
As raised earlier, small numbers of respondents can have significant impacts on annual visitation estimates for specific parks. As a result, parks with a sample size of less than 15 respondents in 2020 were not included in the top 20 parks. For 2020 these excluded parks (and the very indicative visitation estimate) included *Werakata* (751K), *Wolli Creek* (607K), *New England* (549K), *Hat Head* (489K), *Warrumbungle* (467K), *Garigal* (428K), *Dooragan* (394K), *Wollemi* (378K), and *Cape Byron* National Parks (378K).

Estimates for the most visited parks in each NPWS Management Branch for 2020 have been provided in Charts 20 to 27 below. *Please note that visitation estimates calculated for the majority of these parks is based on very small sample sizes and therefore subject to significant error. Visitation estimates should therefore only be seen as indicative.*

Greater Sydney Branch has six parks in the top 20 for visits, as does the Hunter Central Coast Branch. South Coast Branch has three parks in the top 20, North Coast Branch has two and Blue Mountains, Southern Ranges and West Branches each have one. *Warrumbungle National Park* was the most visited park in the Northern Inland Branch in 2020.

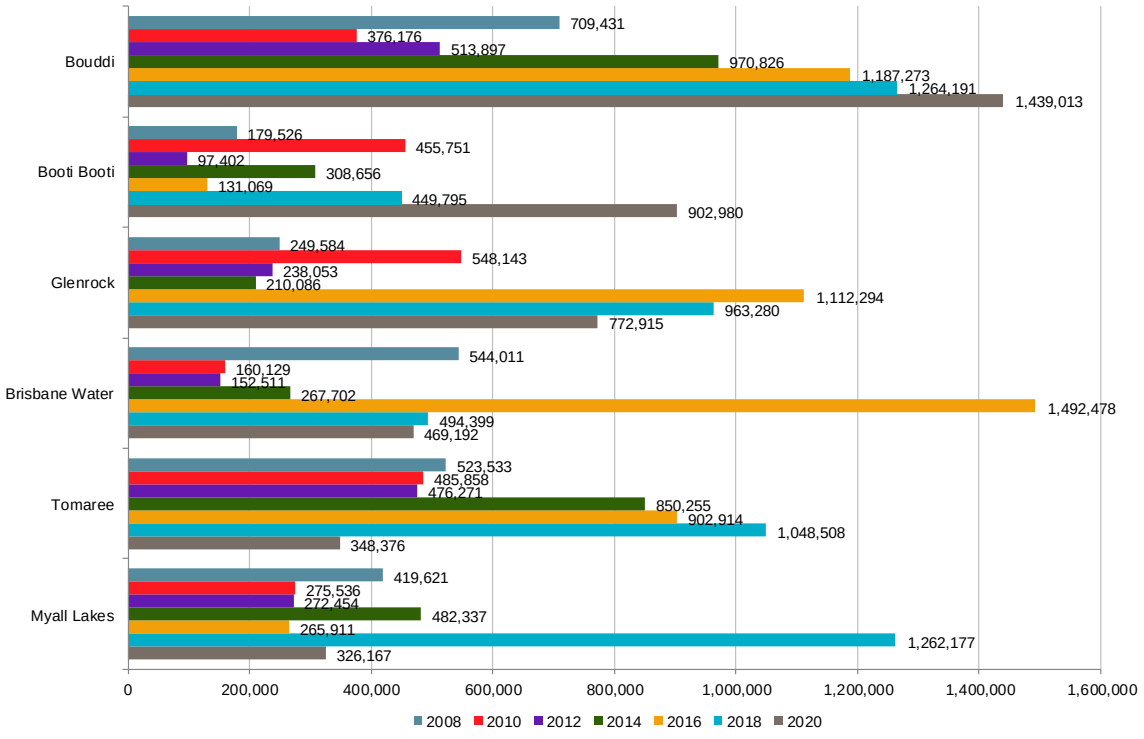
Please note that the redefining of NPWS Parks to NPWS Branches which occurred during 2019 have been incorporated into the following analysis. Accordingly visits to Mount Canobolas SCA have been included in visits to the West Branch for 2018 and 2020, rather than in the Northern Inland Branch, as was the case for 2008 to 2016.

Chart 20: Visitation for the top parks in the North Coast Branch



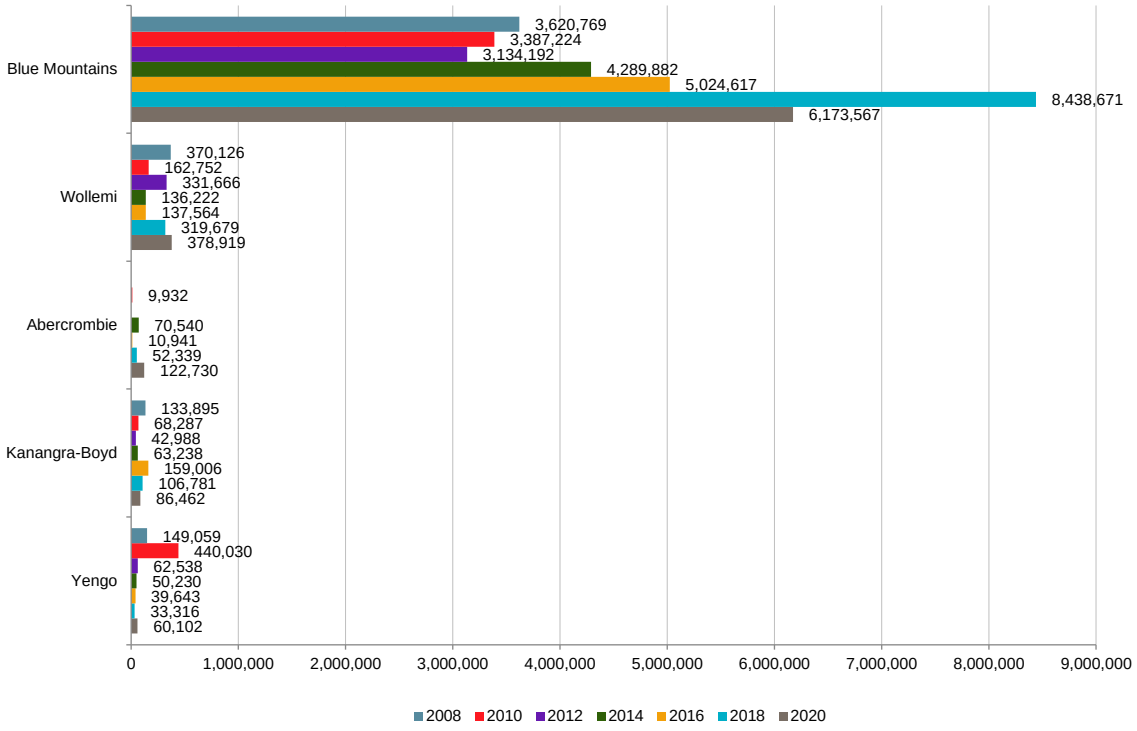
Source: NPWS Parks Visitor Surveys 2008-2020
Base: 2008 n= 297; 2010 n= 280; 2012 n= 257; 2014 n= 309' 2016 n=332; 2018 n= 301; 2020 n=197

Chart 21: Visitation for the top parks in the Hunter and Central Coast Branch



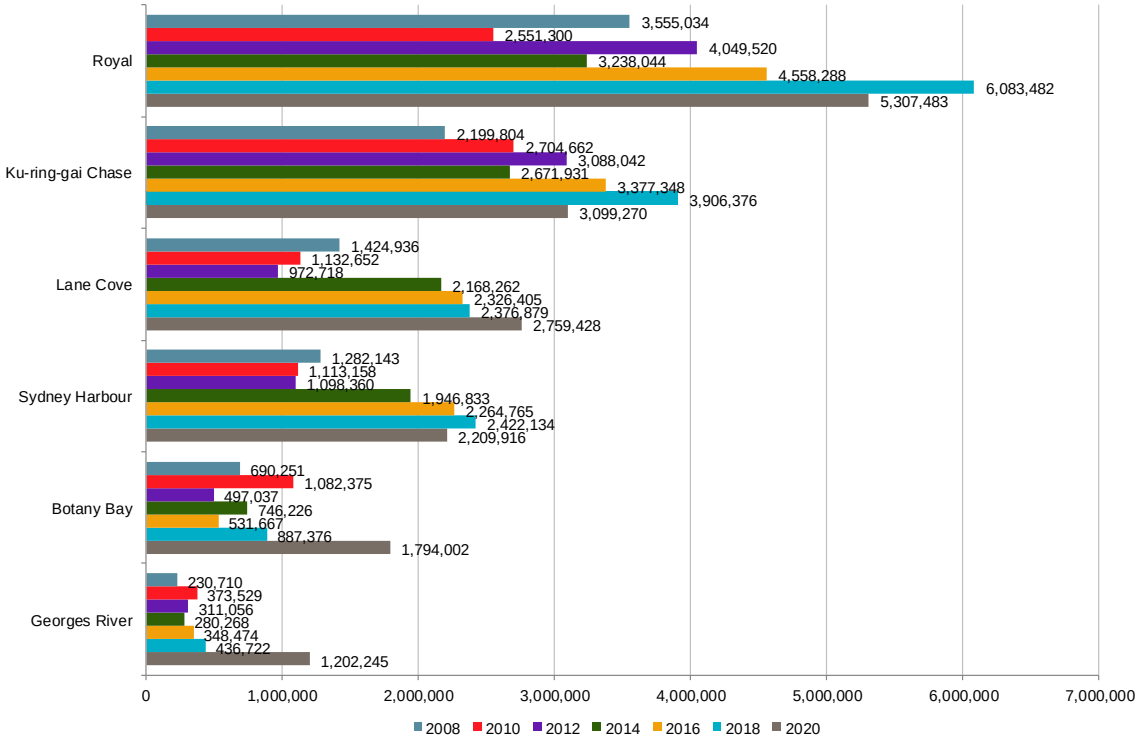
Source: NPWS Parks Visitor Surveys 2008- 2020
Base: 2008 n= 201; 2010 n= 204; 2012 n= 177; 2014 n=242; 2016 n=223; 2018 n= 265; 2020 n=175

Chart 22: Visitation for the top parks in the Blue Mountains Branch



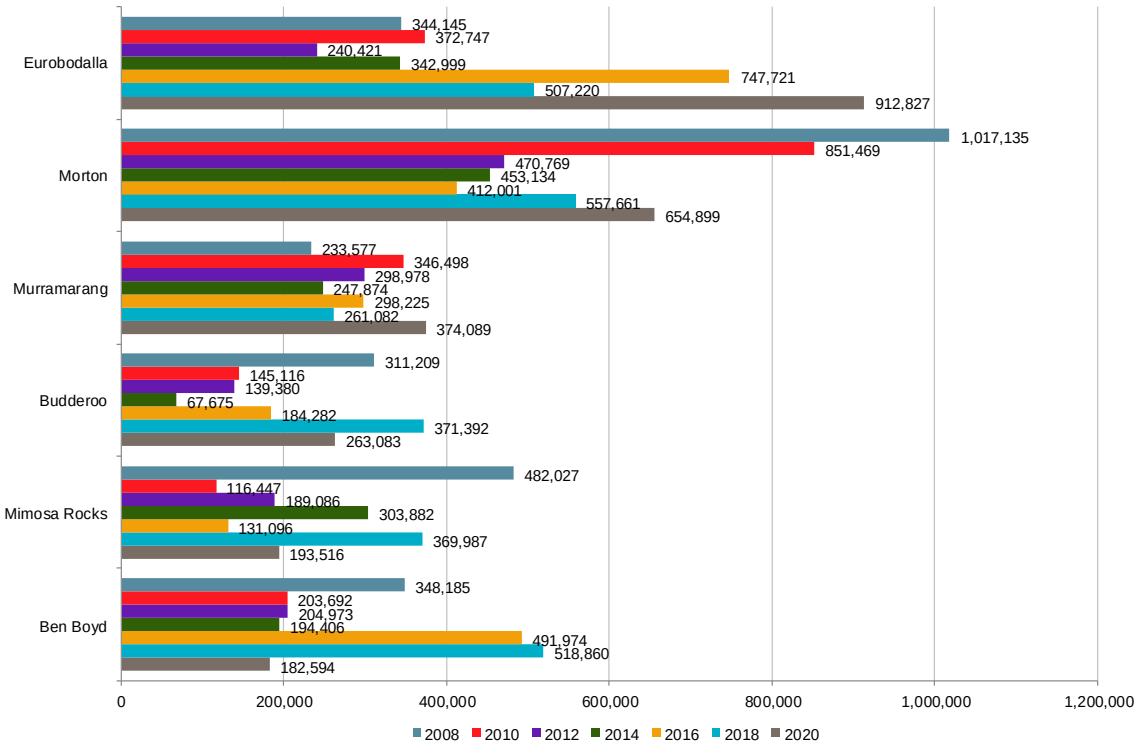
Source: NPWS Parks Visitor Surveys 2018-2020
Base: 2008 n= 201; 2010 n= 187; 2012 n= 185; 2014 n= 228; 2016 n= 223; 2018 n= 219; 2020 n=167

Chart 23: Visitation for the top parks in the Greater Sydney Branch



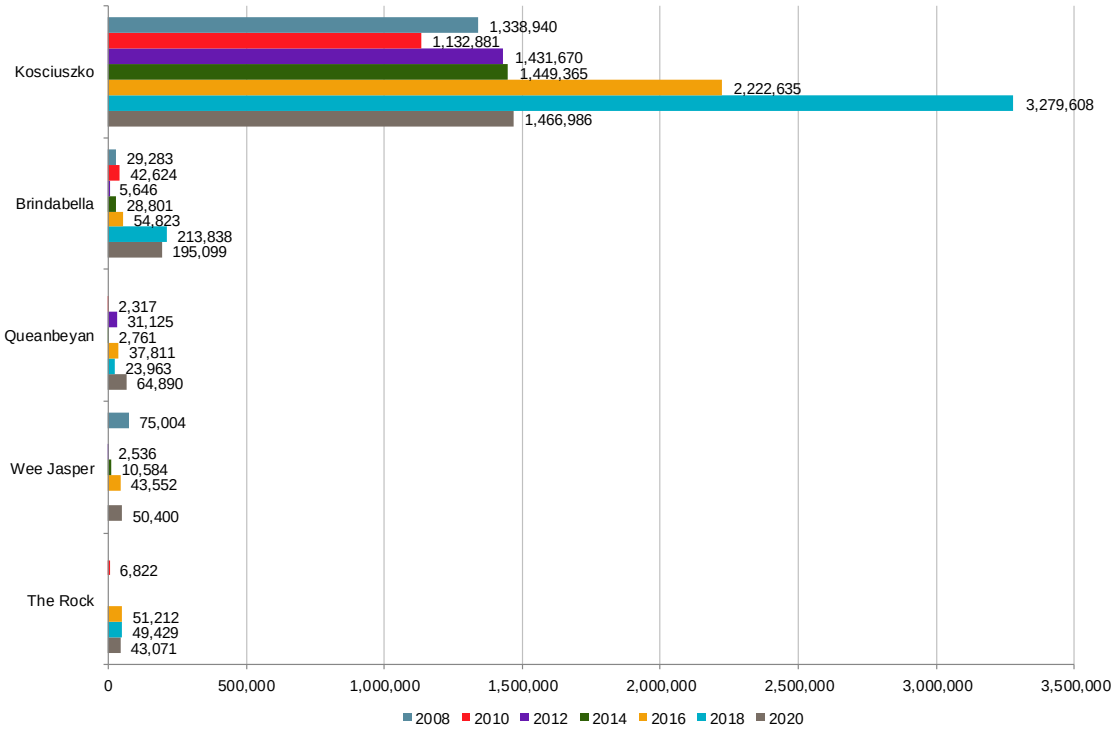
Source: NPWS Parks Visitor Surveys 2018-2020
Base: 2008 n= 513; 2010 n=470; 2012 n= 519; 2014 n=567; 2016 n= 618; 2018 n=647; 2020 n=463

Chart 24: Visitation for the top parks in the South Coast Branch



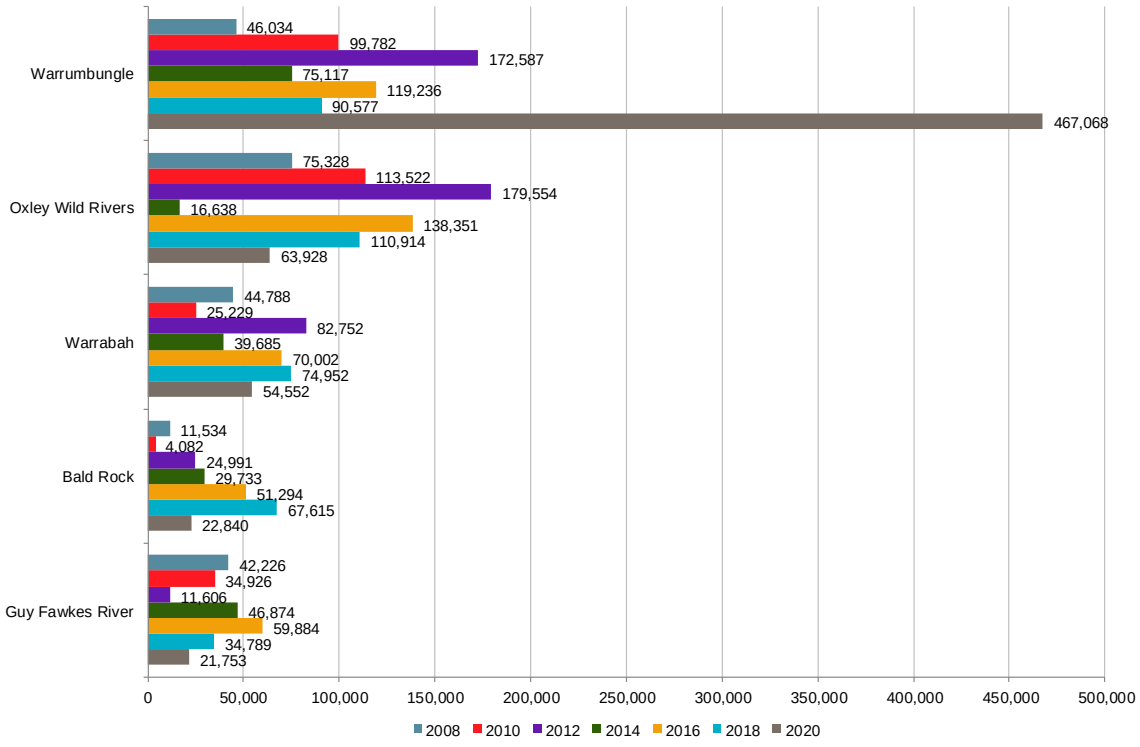
Source: NPWS Parks Visitor Surveys 2018-2020
Base: 2008 n= 305; 2010 n=250; 2012 n= 256; 2014 n=322 2016 n= 279; 2018 n=269; 2020 n=192

Chart 25: Visitation for the top parks in the Southern Ranges Branch



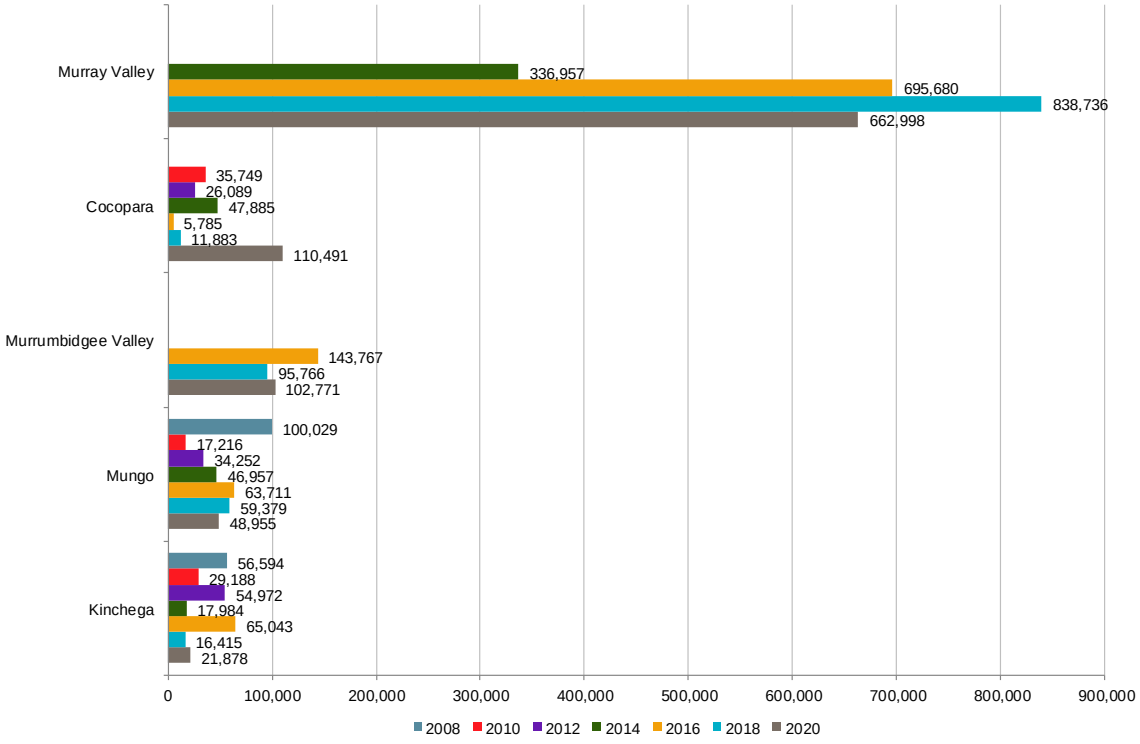
Source: NPWS Parks Visitor Surveys 2018-2020
Base: 2008 n= 145; 2010 n=145 2012 n= 143; 2014 n=167 2016 n= 185; 2018 n=169; 2020 n=100

Chart 26: Visitation for the top parks in the Northern Inland Branch



Source: NPWS Parks Visitor Surveys 2018-2020
Base: 2008 n= 77; 2010 n=65 2012 n= 82; 2014 n=79 2016 n= 87; 2018 n=93; 2020 n=43 – Caution, small sample size for 2020

Chart 27: Visitation for the top parks in the West Branch



Source: NPWS Parks Visitor Surveys 2018-2020
Base: 2008 n= 23; 2010 n=25 2012 n= 31; 2014 n=42 2016 n= 44 2018 n=51; 2020 n=42 – Caution, small sample size (n<50)

7. Potential Factors Influencing Park Visits

This section specifically looks to explore factors with a positive and negative impact on levels of visitation to NPWS parks. In particular the following factors:

- Overall visitation to NSW—specifically overnight visitors, visitor nights and day trips;
- Substitution, including visitation to overseas destinations—specifically domestic visits to overseas destinations and exchange rates;
- Impact of Economic conditions —specifically interest rates, fuel prices and consumer confidence;
- Climate/Weather patterns—specifically temperature, rainfall and specific weather events; and
- Events such as natural disasters and pandemics resulting in major widespread disruptions to travel patterns and/or behaviour.

Please note that for some of the following analyses, wave by wave visitation survey data (i.e. excluding visitation from non-surveyed regions) has been converted into month by month and quarter by quarter data in order to correlate with monthly and quarterly data obtained from other sources. To facilitate this for each survey wave, the number of visits was allocated pro rata based on the number of days in each month within each wave's visitation period. For example, for the visitation period 1 February to 6 March 2008 (wave 1 in 2008), 29 days fell in February and 6 fell in March. The total visitation period is 35 days. Therefore 83% of the visitation period fell in February (29 of 35 days) and 17% fell in March (6 of 35 days). So 83% of the total number of visits in wave 1 2008 were allocated to February and 17% to March.

For 2020, additional analysis was undertaken because of the likely impact of two major events. The first being bushfires that affected a significant area of NSW from November 2019 through to March 2020 and the second being the COVID-19 pandemic, which impacted on NSW and ACT residents from March to June 2020 and on Victorian and Queensland residents until December 2020.

7.1 Impact of Bushfires and the COVID-19 Pandemic

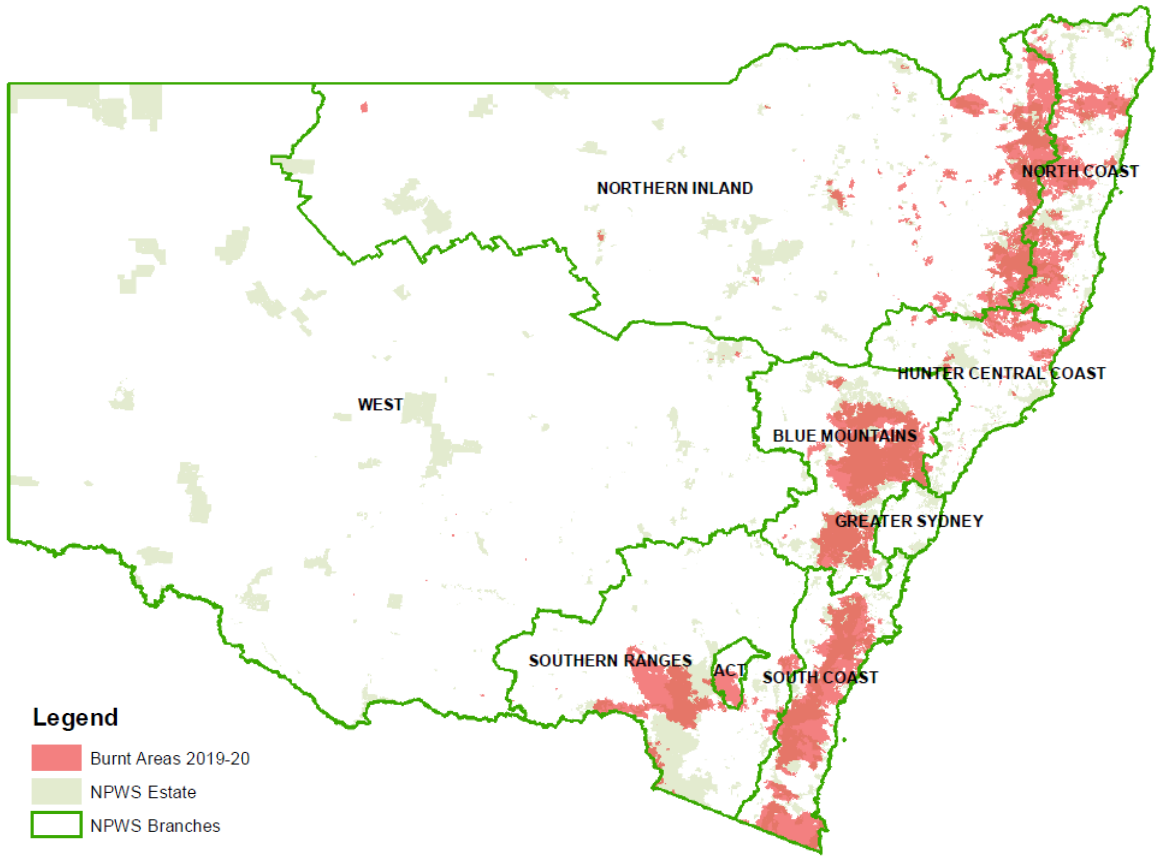
The 2019–20 bushfires in New South Wales (NSW) were unprecedented in their extent and intensity. More than 5.5 million hectares (or more than 7% of the state), including more than 2.7 million hectares in national parks (37% of the NSW park system and 42% of all forests), were impacted. More than 81% of the World Heritage listed Greater Blue Mountains Area and 54% of the NSW components of the Gondwana Rainforests of Australia World Heritage property were affected by fire.

Many individual national parks were seriously affected by the bushfires:

- 57 parks had more than 99% of their area affected by fire (near complete);
- 73 parks had 75–99% of their area affected (majority);
- 31 parks had 50–74% of their area affected (extensive);
- Of the remaining parks affected by fire, 84 had less than 50% of their area affected (partial).

Map 1 following shows the location of the 2019-20 bushfires against in each NPWS Branch. Only the West and Greater Sydney Branches were not significantly affected by the bushfires.

Map 1: 2019-20 Bushfires in each NPWS Branch



Source: Department of Palling, Industry and Environment

For the Northern Inland, North Coast and Hunter Central Coast Branches the bushfires mainly impacted the Great Dividing Range from the Queensland border to north of Taree from October 2019 through to mid-February 2020. Fires burnt to the coast from Casino to Evans Head, south of Grafton to north of Coffs Harbour, and from Port Macquarie to Forster.

The Blue Mountains Branch was almost totally inundated by bushfire, with fires burning from late-October 2019 through to mid-February 2020. The South Coast Branch was similarly inundated, with fires burning from mid-December 2019 through to mid-February 2020. The Southern Ranges Branch was impacted by bushfire from Albury north east through the ACT through to Braidwood from late-December 2019 to early-February 2020.

As a result, a large proportion of the NPWS park estate was closed during fieldwork for the park visitation survey from 10 December 2019 through to 7 March 2020 (with many parks closed well into August 2020). These closures would have had a significant impact on park visitation.

The COVID-19 Pandemic then hit Australia in early March 2020. From 15 March the NSW Minister for Health ordered immediate cancellation of major events with more than 500 people. Major restrictions enacted and repealed from that time included:

18 Mar – Support of the Federal government measure to limit non-essential indoor gatherings of 100 or more people; social distancing of 1.5 metres; and people only travelling when considered essential.
20 Mar – 4 square metres per person for indoor spaces enacted.
23 Mar – Non-essential businesses shut down. Schools remained open for children of essential workers, but parents were encouraged to keep their children at home.
25 Mar – Further restrictions on public gatherings, including closure of outdoor play areas, caravan parks, camping grounds and community facilities enacted. Fitness classes and social sporting activities confined to outdoor spaces with a limit of 10 persons.
30 Mar – Persons restricted to their place of residence and could only leave the dwelling to obtain food and other essentials; travel for work or education was only permitted if the person could not do so from home. Gatherings in public places limited to 2 persons.
1 May – Easing of restrictions - 2 adults and dependent children could visit another household.
11 May – Return to face-to-face teaching and re-opening of selected businesses enacted.
15 May – Gatherings of up to 10 allowed in public places; outdoor play equipment, outdoor gymnasium equipment and skate parks re-opened; public pools limited to 10 people at any one time; but continued prohibition of taking holidays anywhere in the State.
1 June – People could travel to regional NSW for a holiday, with camping grounds and caravan parks re-opened
1 July – Gyms and fitness studios to re-open; children's sport and community sports to resume; outdoor gatherings increased to 20 people.
23 Oct – Outdoor gatherings increased to 30 people. Most other restrictions repealed.
1 Dec – Outdoor gatherings increased to 50 people
7 Dec – Outdoor gatherings increased to 100 people

In the light of these requirements NSW NPWS as a government agency was compelled to variously close parks/restrict visitation during the first half of 2020.

The NSW-Queensland border also had restricted access from 24 March to 1 December (and again after the survey field period was completed), with the NSW-Victorian border closed from 8 July to 23 November (similarly with restrictions enforced again after the survey period). The ACT-NSW border was closed from 3 April to 10 July. This did not allow people living in Queensland, Victoria or the ACT substantive access to parks in NSW over these periods, thereby reducing the potential for interstate visitation to NPWS parks in 2020.

The combined effect of COVID-19 restrictions imposed by multiple jurisdictions had a significant impact on park visitation volumes and patterns.

To better understand the impact of these events and restrictions on park visitation, 2020 survey results have been analysed by three distinct time periods:

Bushfire Period – 10 Dec 2019 to 7 Mar (waves 1-3)
COVID-19 Affected Period – 4 Mar- 27 Jun (waves 4-7)
COVID-19 Rebound Period – 23 Jun-10 Dec (waves 8-13)

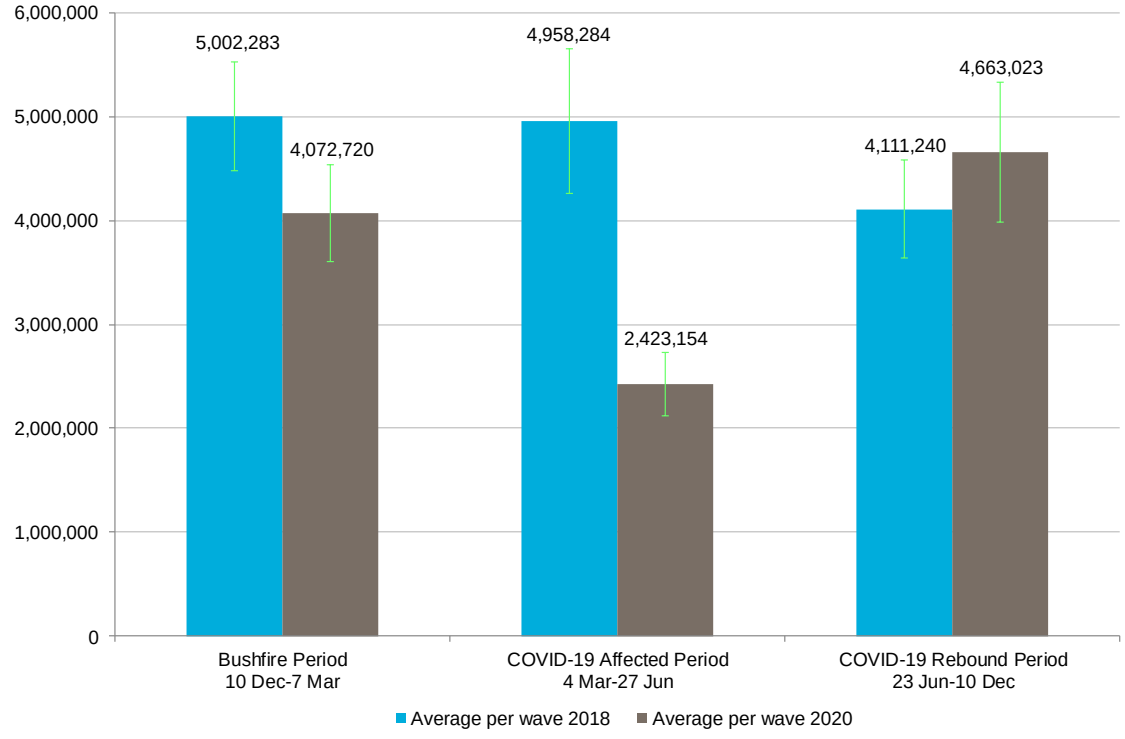
While the COVID-19 Rebound period still includes periods of limitation on visitation to other states and therefore potentially to NPWS parks, for trend analysis purposes the majority of visits to NPWS parks come from visitors living within NSW. As will be seen, there is a substantial increase or

rebound in visits after the COVID-19 Affected period which justifies the "Rebound" classification. It is however, important to note that the characteristics (size, distribution, duration etc.) of the rebound were not consistent across each NPWS Branch. As such, Branch specific trends are also described in more detail in subsequent analysis.

As the analysis periods vary in length, analysis of visits has been made on the average visits per wave for each period. Comparison has been made with the 2018 visitation estimate for these same periods to illustrate changes in visits with what could now be considered to be a more 'normal' year in visitation trend terms.

Chart 28 shows that average visits per wave within the for the Bushfire period declined from 5.00m visits per wave in 2018 to 4.07m visits in 2020, a decline of 0.93m visits per wave. Whilst this decline is not statistically significant, it does provide strong indicative evidence that the bushfires and resultant park closures did have a negative impact on park visitation in early 2020. Visitation per wave also declined significantly from 2018 to 2020 for the COVID-19 Affected period (from 4.96m visits per wave to 2.42m visits per wave – a fall of 2.54m visits per wave). A decline which is statistically significant. COVID-19 restrictions can therefore be seen to have impacted significantly on visitation in 2020. Average visits per wave to NPWS parks in the COVID-19 Rebound period increased from 4.11m visits per wave in 2018 to 4.66m visits per wave in 2020. Whilst the increase was not statistically significant, an indicative increase of 0.55m visits per wave does correlate with anecdotal commentary re a strong rebound in visitation after the strongest COVID-19 restrictions were lifted.

Chart 28: Average Visits per Wave for COVID-19/Bushfire Periods



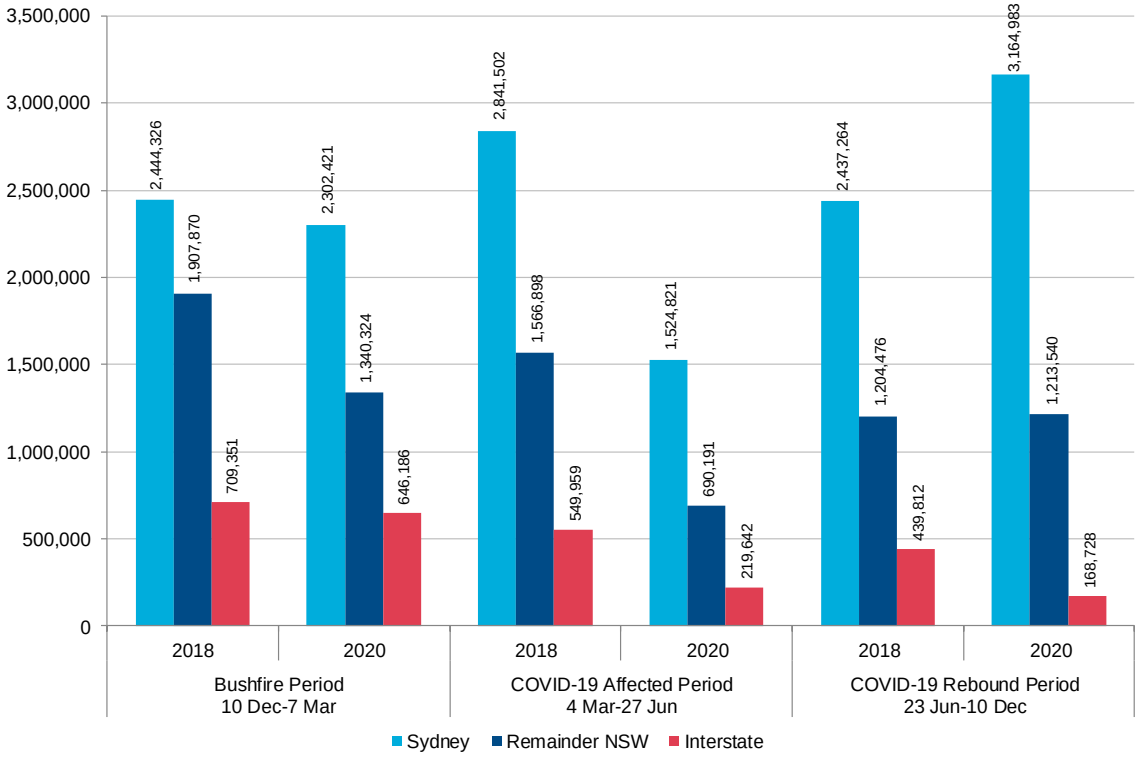
Source: NPWS Parks Visitor Surveys 2018 - 2020
Base: 2018 n=1,739; 2020 n- 1,178

When analysing visits by area of origin (Chart 29) it can be seen that there was only a slight decline in the number of visits per wave for the Bushfire period from 2018 to 2020 (2.44m to 2.30m) among Sydney residents. As the Sydney metropolitan area was largely unaffected by the bushfires, it is not surprising that only a slight decline was observed (most likely also boosted by the inability of Sydney residents to visit parks in the Blue Mountains, Hunter Central Coast and South Coast due to bushfires). Similarly, there was only a slight decline in the proportion of interstate residents visiting NPWS parks during the Bushfire period (0.71m to 0.65 visits per wave). This decline was mostly driven by visitors from Melbourne (0.30m to 0.07m visits per wave) who would have been unable to enter NSW due to their own bushfires from just outside Metropolitan Melbourne to northeast NSW-Victorian border as well as being impacted by fires on the NSW South Coast.

A marked decline in visits per wave was observed amongst people living in the Remainder of NSW during the Bushfire period (1,91m to 1.34m). This is not surprising, considering the extent of the bushfires which impacted on parks in the Northern Inland, North Coast, Hunter Central Coast, Blue Mountains, South Coast and Southern Ranges Branches over this period, either limiting/ completely obstructing access or reducing motivation to travel to NPWS parks in these areas.

Not surprisingly, marked falls in visits per wave were observed amongst Sydney, Remainder NSW and Interstate residents from 2018 to 2020 during the COVID-19 Affected period (Sydney – 2.84m to 1,53m; Remainder NSW 1.57m to 0.69m; Interstate 0.55m to 0.22m). Limitations on travel, closed state borders and lockdowns due to COVID-19 restrictions significantly impacted individual/group capacity to access NPWS parks.

Chart 29: Average Visits per Wave for COVID-19/Bushfire Periods by Area of Origin



Source: NPWS Parks Visitor Surveys 2018 - 2020
Base: 2018 n=1,739; 2020 n- 1,178

For the COVID-19 Rebound period NPWS park visits per wave from people living in Sydney increased markedly from 2018 to 2020 (2.44m, to 3.16m). This matches anecdotal commentary that Sydneysiders relished the opportunity to visit parks within a reasonable vicinity of their home once COVID-19 restrictions started to ease. For residents of the Remainder of NSW, visits per wave in the COVID-19 Rebound period remained virtually unchanged between 2018 and 2020 (1.20m to 1.21m), most likely indicating that visits to local NPWS parks resumed, but visits to more distant parks across the state did not eventuate, possibly due to concerns about the potential risk of a subsequent COVID-19 lockdown stranding visitors away from their home. Visits per wave from interstate residents declined during the COVID-19 Rebound period (0.44m to 0.17m), primarily due to Victorian and Queensland borders being closed until late-November-early-December, limiting or prohibiting access to NPWS parks from these states.

7.1.1 COVID-19/Bushfire Impact by NPWS Branch

Analysis of visits per wave between 2018 and 2020 for the COVID-19/Bushfire periods by NPWS Branch reveals the following (See Charts 30 and 31)

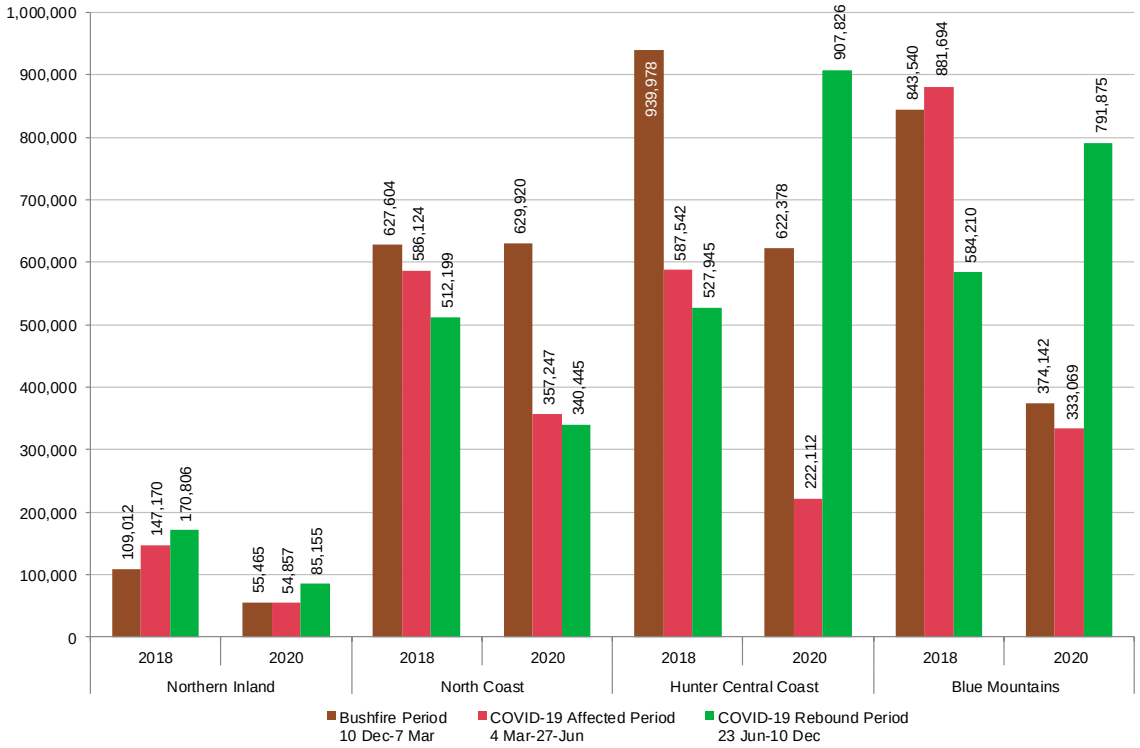
Northern Inland – Visits per wave declined during the Bushfire period due to the direct impact of bushfires on the Branch (109K to 55K), with a similar decline in the COVID-19 Affected period due to restrictions encountered (147K to 55K). There was also a decline in the COVID-19 Rebound period (170K to 85K), which would have been primarily driven by QLD border closures.

North Coast – Visits per wave were almost identical during the Bushfire period from 2018 to 2020 (628K to 630K), with parks along the coast generally being less impacted by bushfires allowing holiday-makers to continue to visit parks over this period. Visits declined from 586K in 2018 to 357K in 2020 for the COVID-19 Affected period due to NSW/QLD access restrictions. Visits also declined in the COVID-19 Rebound period from 512K to 340K with QLD border restrictions no doubt playing a major role especially in the far north coast.

Hunter Central Coast – Visits declined during the Bushfire period (940K to 622K) and the COVID-19 Affected period (587K to 222K), with bushfires impacting the northern and western borders of the Branch and COVID-19 restrictions in effect respectively. Visits increased from 527K per wave in 2018 to 908K per wave in 2020 for the COVID-19 Rebound period driven by local visitors and those from metropolitan Sydney accessing parks in the branch.

Blue Mountains – This Branch was severely affected by bushfires during the Bushfire period as visits per wave declined from 844K to 374K, with similar falls experienced over the COVID-19 Affected period (882K to 333K). Visits increased markedly during the COVID-19 Rebound period (584K to 792K), mainly driven by increased visits from Sydneysiders.

Chart 30: Average Visits per Wave for COVID-19/Bushfire Periods by NPWS Branch Pt 1



Source: NPWS Parks Visitor Surveys 2018 - 2020
Base: 2018 n=1,739; 2020 n- 1,178

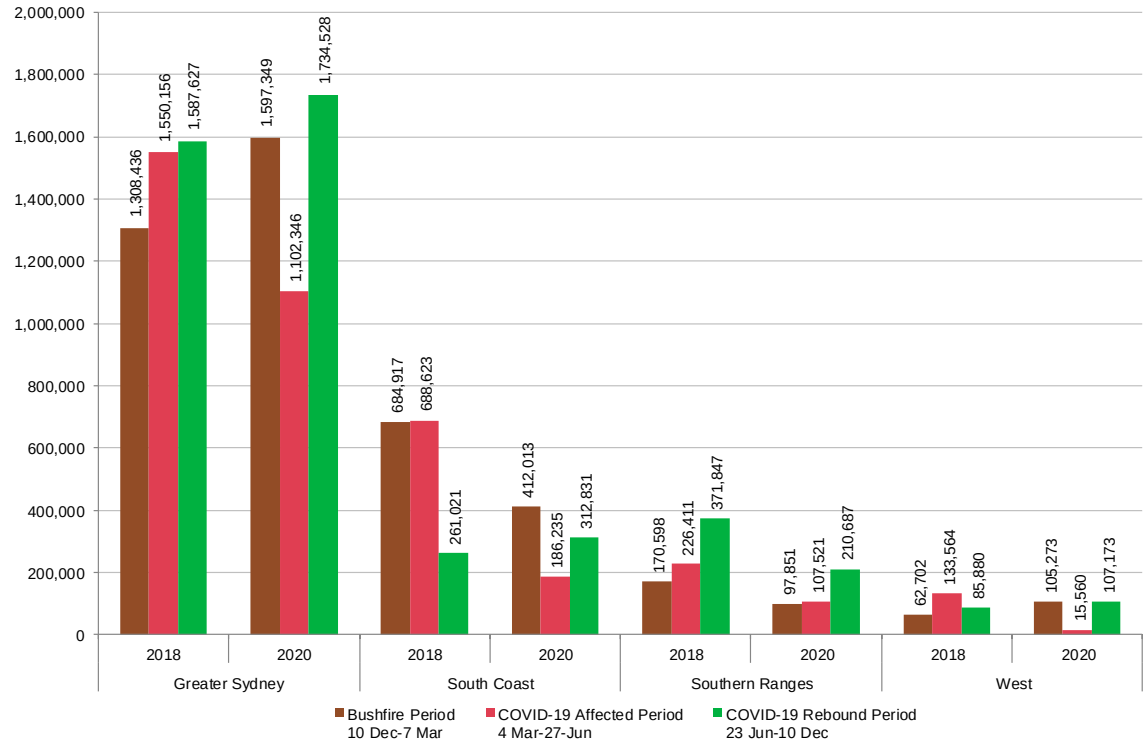
Greater Sydney – Visits in the Bushfire period increased from 1.31m in 2018 to 1.60m per wave in 2020 as Sydney was only marginally affected by bushfires. Declines in visits per wave during the COVID-19 Affected period were strongly evident as a result of the restrictions enacted (1.55m to 1.10m). An increase in visits per wave was evident for the COVID-19 Rebound period (1.59m to 1.73m) mainly due to increases in visits from Sydneysiders.

South Coast – Visits per wave declined markedly from 685K to 412K during the Bushfire period, due to the severity of bushfires in the Branch. Similarly, visits declined markedly in the COVID-19 Affected period due to restrictions enacted (689K to 186k). Visits per wave increased slightly in the COVID-19 Rebound period (261K to 313K) primarily driven by increased visitation from local residents.

Southern Ranges – Visits per wave declined across all three periods (Bushfire period 171K to 98K; COVID-19 Aaffected period 226K to 108K; COVID-19 rebound period 372K to 211K) Visitation to parks within the Branch was significantly impacted by bushfires, COVID-19 restrictions and the Victorian border remaining closed until late November 2020.

West – An increase in visits per wave was observed for the Bushfire period (63K to 105K) as the Branch was virtually untouched by bushfires. COVID-19 restrictions substantially reduced visitation per wave from 134K to just 16K for the COVID-19 Affected period. However, visits per wave increased slightly for the COVID-19 rebound period (86K to 107K) due to increases in local visits outstripping declines from extended Victorian border closures.

Chart 31: Average Visits per Wave for COVID-19/Bushfire Periods by NPWS Branch Pt 2



Source: NPWS Parks Visitor Surveys 2018 - 2020
Base: 2018 n=1,739; 2020 n- 1,178

Analysing average visits per wave to individual Branches by area of origin provides additional insight into drivers of visitation trends during the COVID-19/Bushfire periods. (Charts 32 to 39),

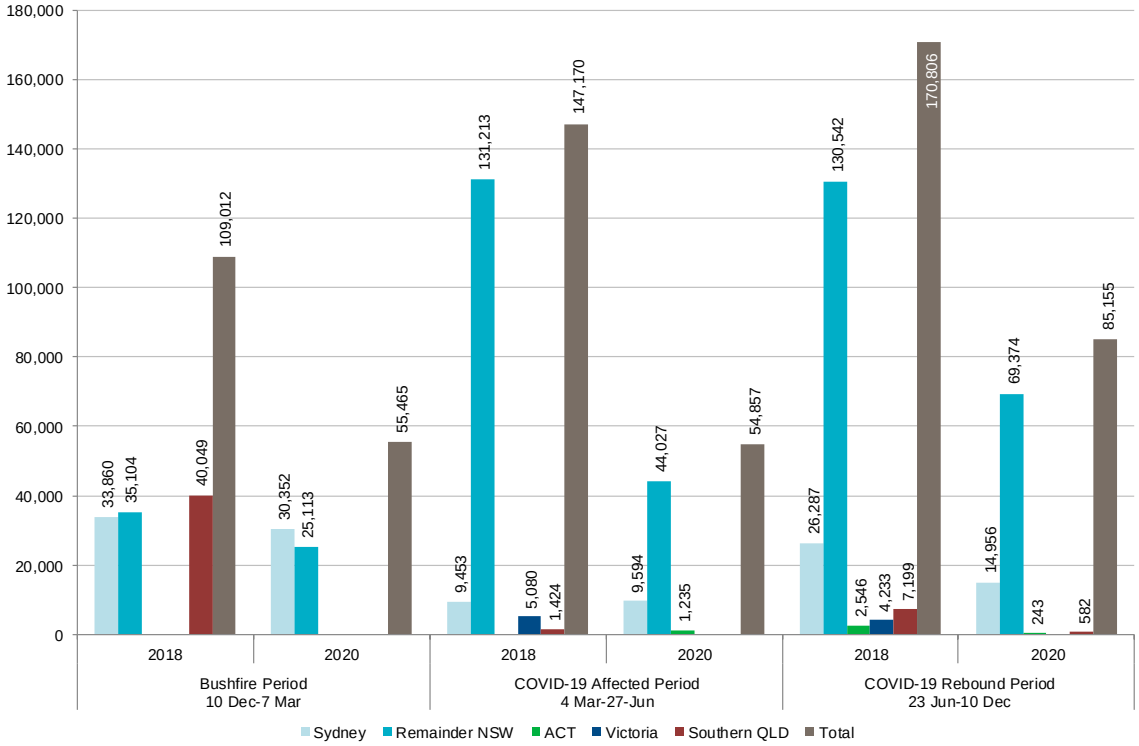
Northern Inland

While the sample size is small for 2020 visits to the Northern Inland Branch, inferences can still be made as to the origin market composition of Branch visits. Declines in visits during the Bushfire period can primarily be attributed to visits from Queenslanders falling from 40K to zero in 2020 (See Chart 32).

The fall in visits in the COVID-19 Affected period can be attributed to the marked fall in visits from regional NSW (Remainder of NSW) visitors (from 131K to 44K), most likely more localised visitors.

The decline in visits in the COVID-19 Rebound period is mainly due to the fall in visits from regional NSW (Remainder NSW) visits from 131K to 69K and to a lesser extent from interstate visits due to border closures (from 14K to 1K) and visits from Sydney (from 26K to 15K).

Chart 32: Average Visits per Wave for COVID-19/Bushfire Periods for Northern Inland



Source: NPWS Parks Visitor Surveys – Visits to Northern Inland Branch 2018 - 2020
Base: 2018 n=93; 2020 n- 43 = caution, small sample size.

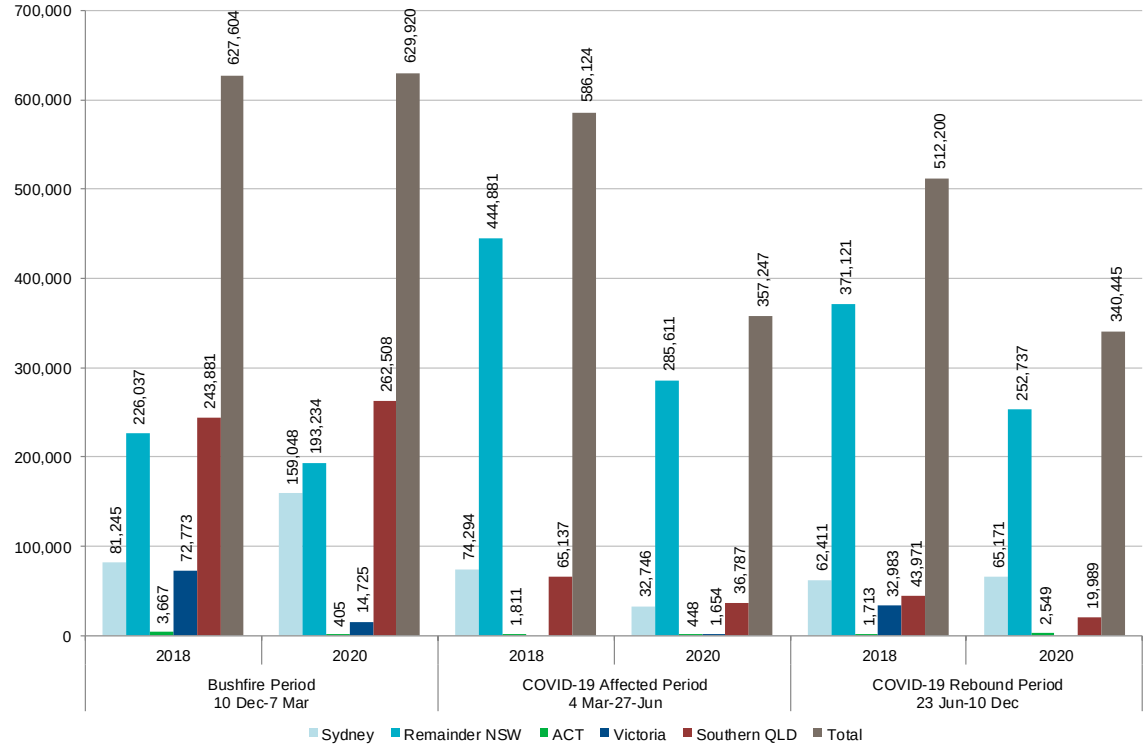
North Coast

While overall visits per wave were almost identical for the Bushfire period in 2018 and 2020, 2020 visits increased from Sydney (81K to 159K), but fell for Victoria (72K to 15K).

The fall in visits for the COVID-19 Affected period from 2018 to 2020 was primarily due to decreases in visits from regional NSW (Remainder NSW from 445K to 286K).

Declines in local visits (Remainder NSW from 371K to 253K) and from people living in Victoria (33K to zero) and Queensland (44K to 20K) were the main reasons for the overall decline in visits in the COVID-19 Rebound period (See Chart 33).

Chart 33: Average Visits per Wave for COVID-19/Bushfire Periods for North Coast



Source: NPWS Parks Visitor Surveys – Visits to North Coast Branch 2018 - 2020
Base: 2018 n=301; 2020 n- 197

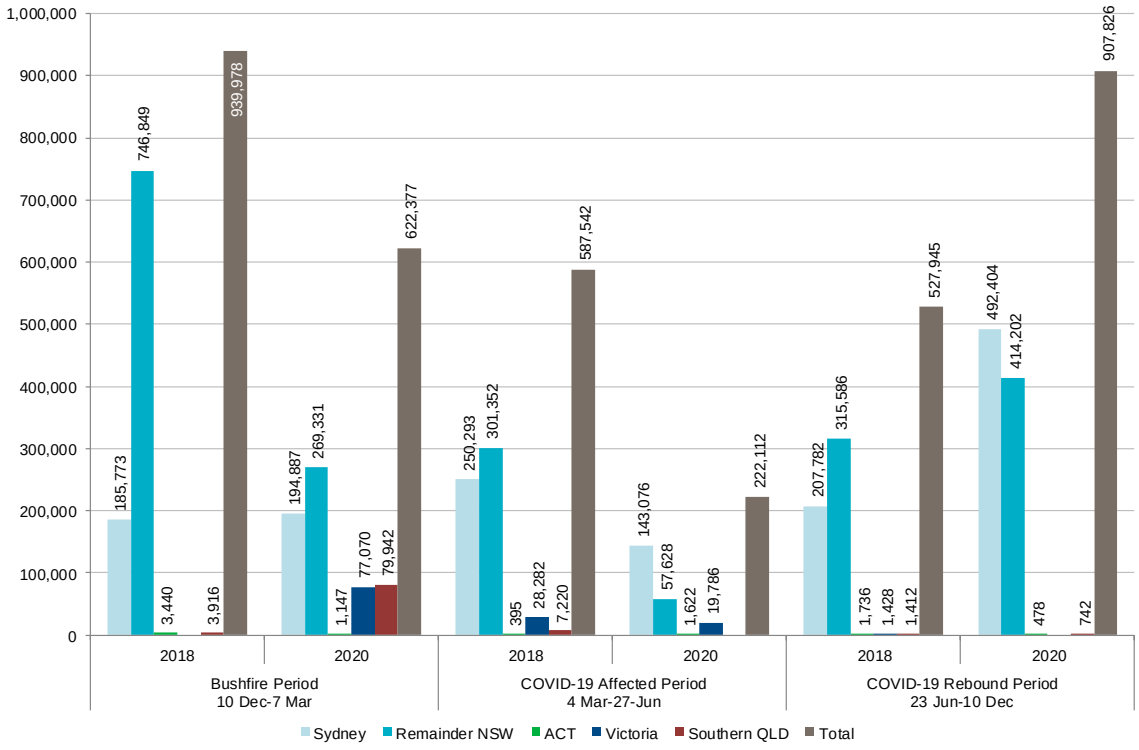
Hunter Central Coast

While the decline in visits per wave in the Bushfire period can be mainly attributed to the fall in visits from regional NSW (Remainder NSW 747K to 269K), there were increases in visits from Victoria (zero to 77K) and Queensland (4K to 80K) from 2018 to 2020 (See Chart 34).

Declines in visits from virtually all regions of origin were evident for the COVID-19 Affected period, particularly from regional NSW (Remainder NSW 301K to 58K).

The increase in visits per wave for the COVID-19 Rebound period was due to marked increase in visits from Sydney (208K to 492K) and, to a lesser extent, regional NSW origins (Remainder NSW 316K to 414K).

Chart 34: Average Visits per Wave for COVID-19/Bushfire Periods for Hunter Central Coast



Source: NPWS Parks Visitor Surveys – Visits to Hunter Central Coast Branch 2018 - 2020
Base: 2018 n=265; 2020 n- 175

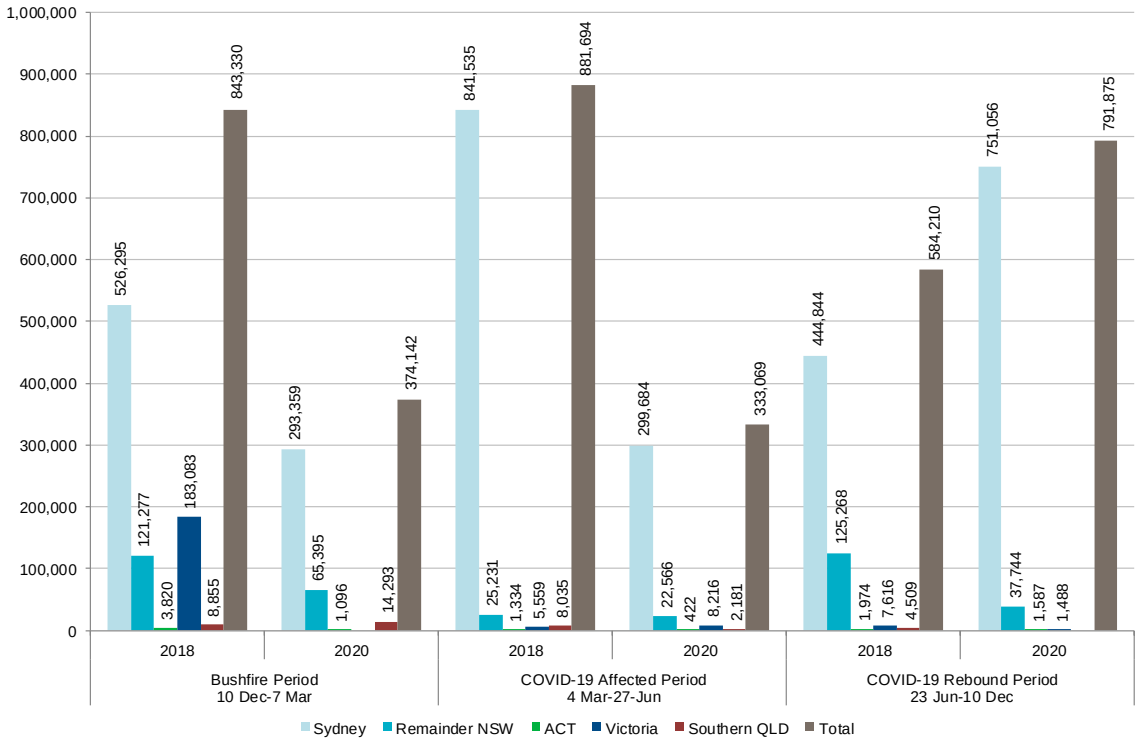
Blue Mountains

The marked decline in visits to the Blue Mountains Branch during the Bushfire period was primarily the result of falls in visits from Sydneysiders (Sydney 526K to 293K) and the lack of visits from Victorians (183K to zero).

The fall in visits over the COVID-19 Affected period can be solely attributed to the fall in visits from Sydneysiders (842K to 300K i.e. local visits).

For the COVID-19 Rebound period, the rise in visits from Sydneysiders (Sydney 445K to 751K) drove the overall increase in visits to the Branch, with visits from all other regions of original falling over the period (139K to 41K) (See Chart 35).

Chart 35: Average Visits per Wave for COVID-19/Bushfire Periods for Blue Mountains



Source: NPWS Parks Visitor Surveys – Visits to Blue Mountains Branch 2018 - 2020
Base: 2018 n=219 2020 n- 167

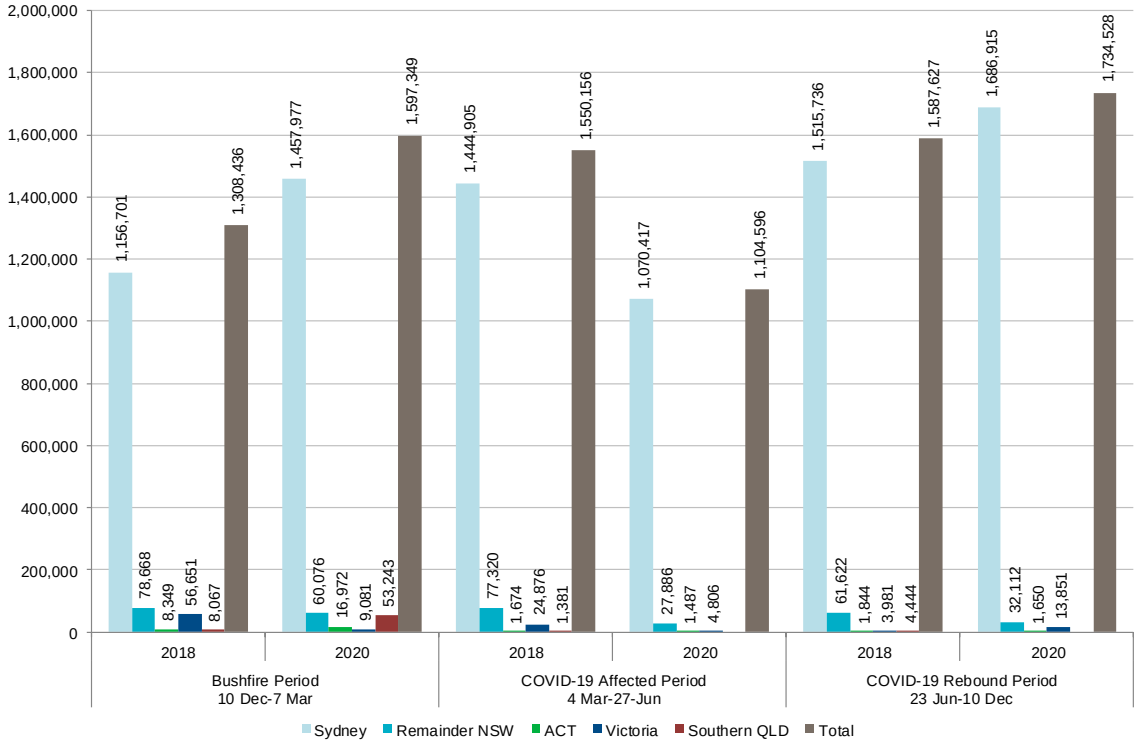
Greater Sydney

Localised visits (i.e. from Sydneysiders) increased from1.16m to 1.46m for the Bushfire period from 2018 to 2020, as the Branch was not significantly affected by bushfires (See Chart 36).

Similarly, the fall in localised visits from Sydneysiders (1.44m to 1.07m) was the prime cause of fall in visits for theCOVID-19 Affected period.

Again, the rise in localised visits form 1.51m to 1.69m largely drove the increase in visits for the COVID-19 Rebound period in the Greater Sydney Branch.

Chart 36: Average Visits per Wave for COVID-19/Bushfire Periods for Greater Sydney



Source: NPWS Parks Visitor Surveys – Visits to Greater Sydney Branch 2018 - 2020
Base: 2018 n=647 2020 n- 463

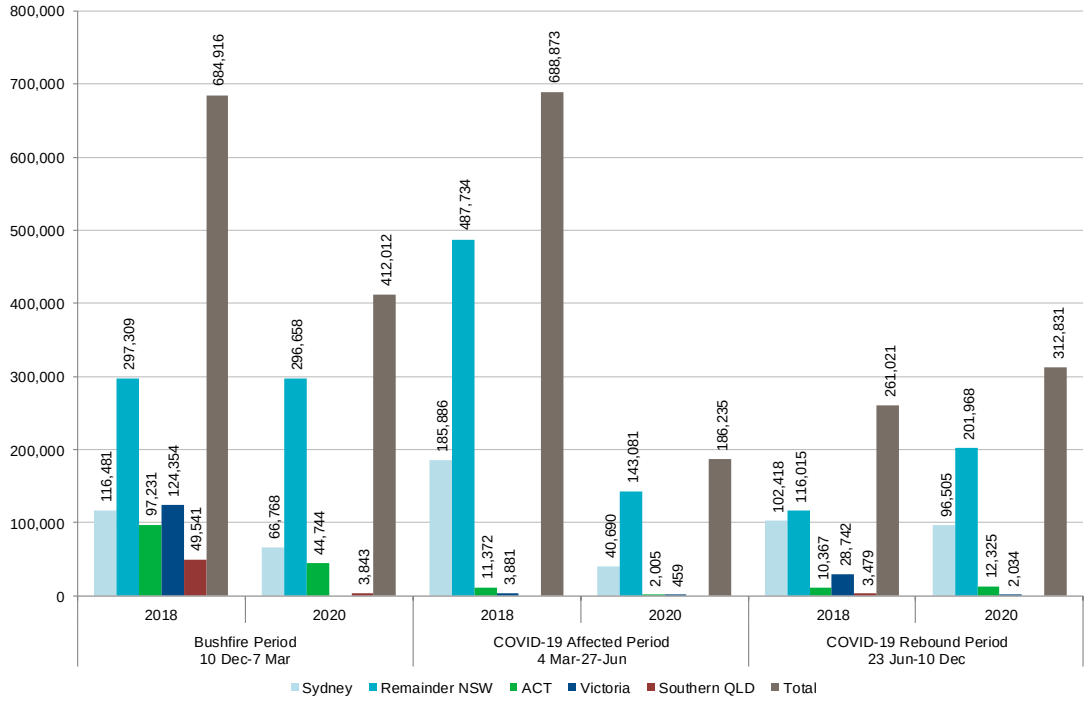
South Coast

The fall in visits to the South Coast Branch in the Bushfire period was due falls in visits from Sydneysiders (116K to 67K), ACT (97K to 45K), Victoria (124K to zero) and Queensland (50K to 4K). Visits from regional NSW (Remainder NSW) were static over the period (297K each).

The decline in visits for the COVID-19 Affected period can be mainly attributed to the fall in regional NSW visits (Remainder NSW 488K to 143K) and to a lesser extent, Sydney visits (186K to 143K).

The increase in visits to the South Coast Branch for the COVID-19 Rebound period can be solely attributed to increases in visits from regional NSW (Remainder NSW 116K to 202K) (See Chart 37).

Chart 37: Average Visits per Wave for COVID-19/Bushfire Periods for South Coast



Source: NPWS Parks Visitor Surveys – Visits to South Coast Branch 2018 - 2020
Base: 2018 n=269 2020 n- 192

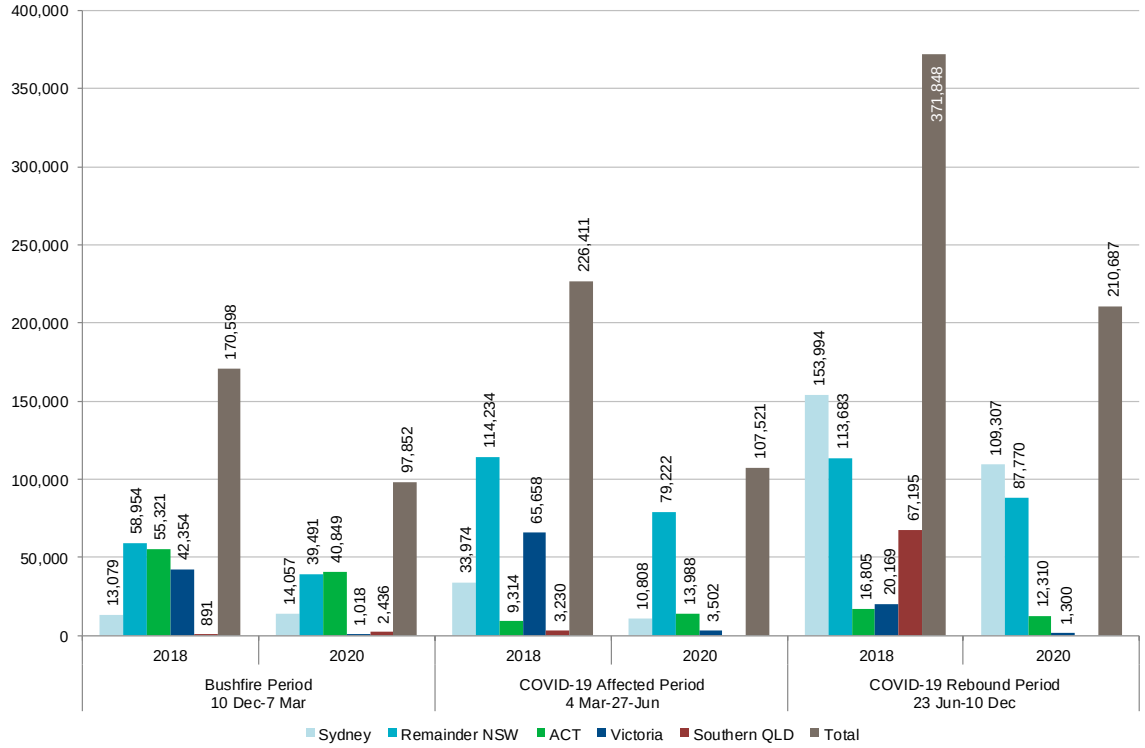
Southern Ranges

The decline in visits for the Bushfire period is the result of declines in visits from Victoria (42K to 1K), the ACT (55K to 41K) and from visits from regional NSW (Remainder NSW 59k to 39K).

The main decline in visits for the COVID-19 Affected period is a driven by declines in visits from Victoria (66K to 4K) and regional NSW (114K to 79K).

Declines in visits from every region of origin contributed to the declines in visits for the COVID-19 Rebound period, most notably from Queenslanders (67K to zero) (See Chart 38).

Chart 38: Average Visits per Wave for COVID-19/Bushfire Periods for Southern Ranges



Source: NPWS Parks Visitor Surveys – Visits to Southern Ranges Branch 2018 - 2020
Base: 2018 n=169 2020 n- 100

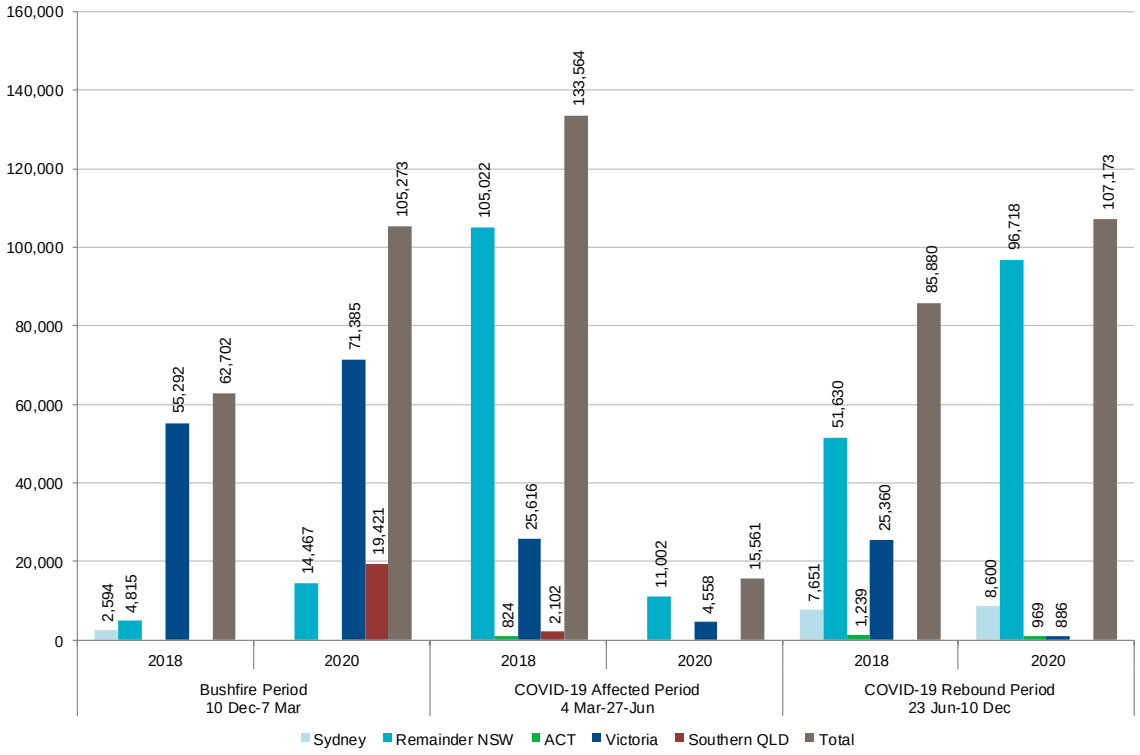
West

Caution should be taken in assessing regional contribution to visits to the West Branch due to very small sample sizes. Increases in visits for the Bushfire period were primarily the result of increases in visits from Victoria (55K to 71K), Queensland (zero to 19K) and from regional NSW (Remainder NSW 5K to 14K) (See Chart 39).

The primary driver of declines in visits for the COVID-19 Affected period was a fall in visits from regional NSW (Remainder NSW 105K to 11K) and to a lesser extent from fall in Victorian visits (26K to 5K).

The rise in visits for the COVID-19 Rebound period is solely due to the rise in visits from regional NSW (52K to 97K), as ongoing border closures resulted in marked fall in visits from Victorians (25K to 1K).

Chart 39: Average Visits per Wave for COVID-19/Bushfire Periods for West



Source: NPWS Parks Visitor Surveys – Visits to West Branch 2018 - 2020
Base: 2018 n=51 2020 n- 42 – caution, small sample sizes.

Further analysis of COVID-19/Bushfire periods is undertaken in Sections 8 - Other Survey Results and Section 9 – Park Visitor Needs Based Segmentation.

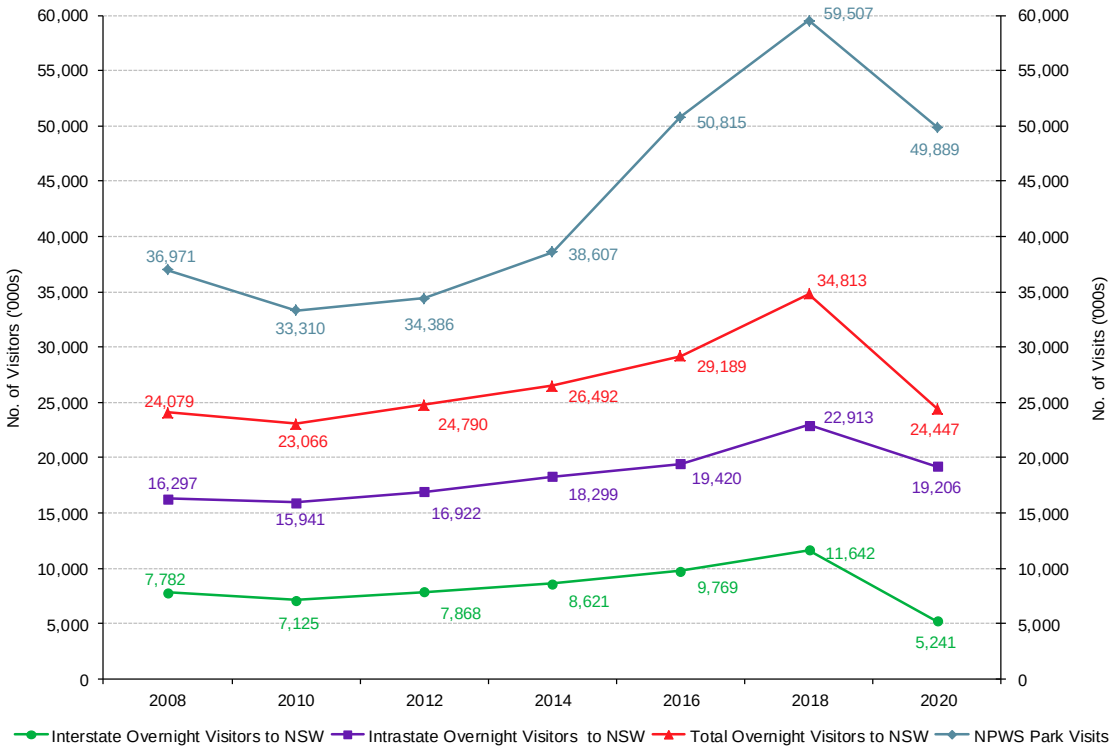
7.2 Visitation to New South Wales

Chart 40 shows annual survey visitation data for survey years 2008 to 2020 (adjusted as detailed above) and compares it with the number of visitors taking overnight trips to destinations in New

South Wales[24]. Overnight visitation has been divided into interstate visitors and intrastate visitors. Results show that overnight visitation did fall from 2008 to 2010, but rebounded in 2012 (exceeding 2008 levels) and increased again in 2014, 2016 and 2018. It then fell significantly in 2020 (most likely due to COVID-19 restrictions impacting negatively on visitation. This result was consistent across both interstate and intrastate visitors, although the decline in interstate visitation was more marked. NPWS park visitation data, whilst showing a rebound from 2010 levels in 2012, did not exceed 2008 levels, but increased from 2014 onward to its highest level in 2018 and then declined in 2020.

The same result can be seen in Chart 41, which compares NPWS park visitation data with visitor nights in NSW.

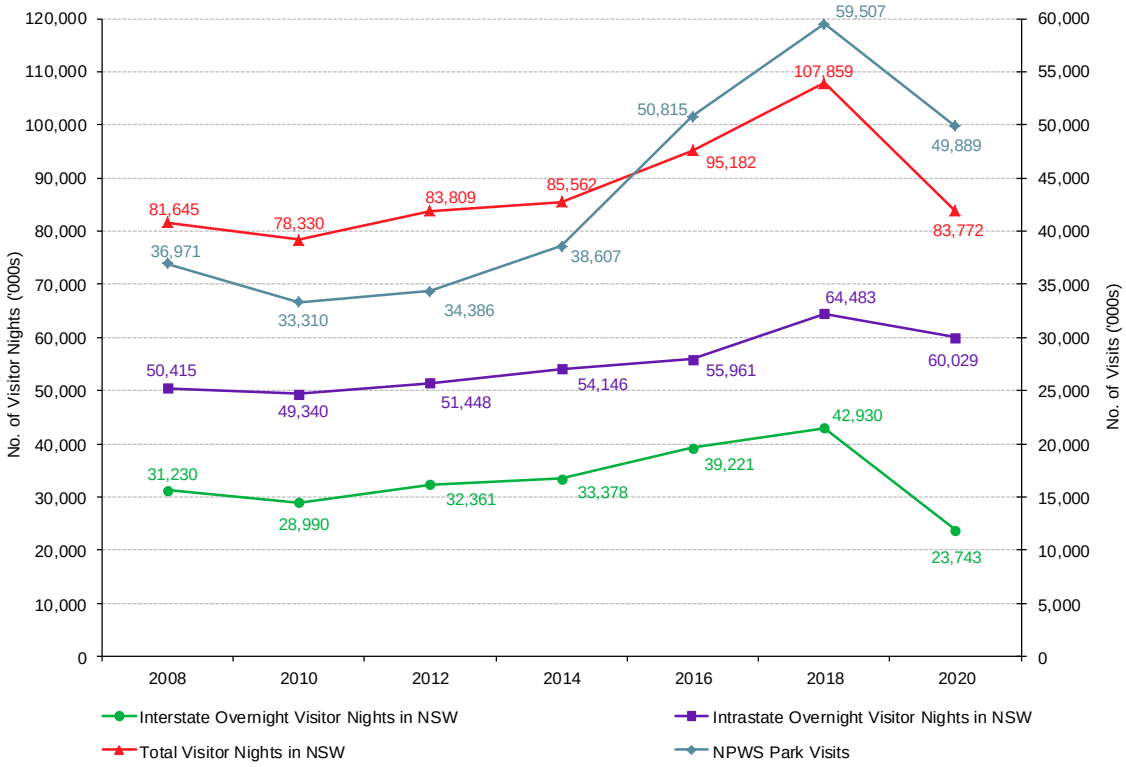
Chart 40: Annual NPWS Park Visitation versus Overnight Visitors to NSW



Sources: National Visitor Survey – Tourism Research Australia; NPWS Parks Visitor Surveys 2008-2020

[24] National Visitor Survey – Tourism Research Australia.

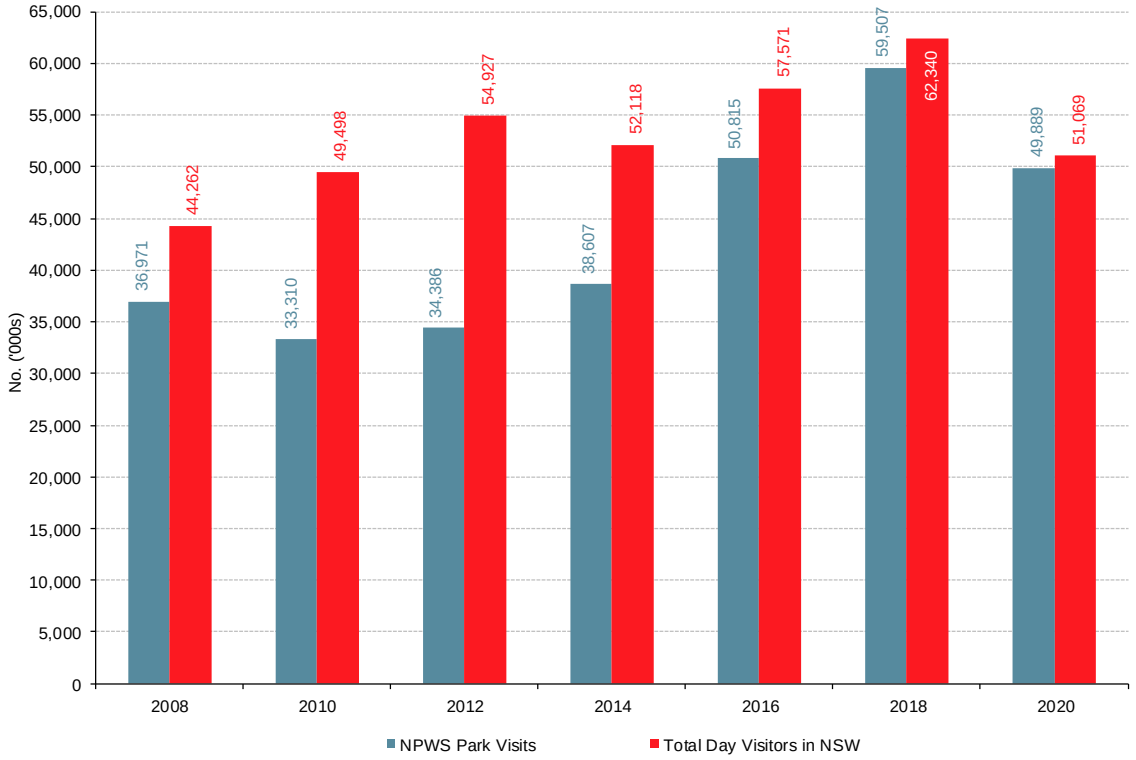
Chart 41: Annual NPWS Park Visitation versus Visitors' Nights in NSW



Sources: National Visitor Survey – Tourism Research Australia; NPWS Parks Visitor Surveys 2008-2020

However, an argument can be made that the majority of visits to NPWS parks would be for day trips (which has been proven via new questions added from wave 7 in 2016—see section 8.4 for more details), so NPWS park visitation should match more closely with day trip visitation in NSW. Chart 42 compares annual NPWS park visitation with day trip visitation to NSW. As can be seen, the number of day trip visitors has steadily increased over time from 44.3m visits in 2008 to 54.9m visits in 2012, and then declined in 2014 to 52.1m, before increasing again in to 57.6m in 2016 and 62.8m in 2018. It then declined to 51.1m in 2020. Conversely, the number of NPWS park visits declined in 2010 and then increased in 2012 (but not to 2008 levels) and then further increased from 2014 to record levels in 2016 and 2018, before declining in 2020. The pattern displayed for day trip visitors in NSW is not evident in NPWS park visits. However, it should also be noted that the definition of a daytrip used in tourism statistics (travel distance as well as duration based) differs from that used in the Park Visitor Survey.

Chart 42: Annual NPWS Park Visitation versus Day Visitors in NSW

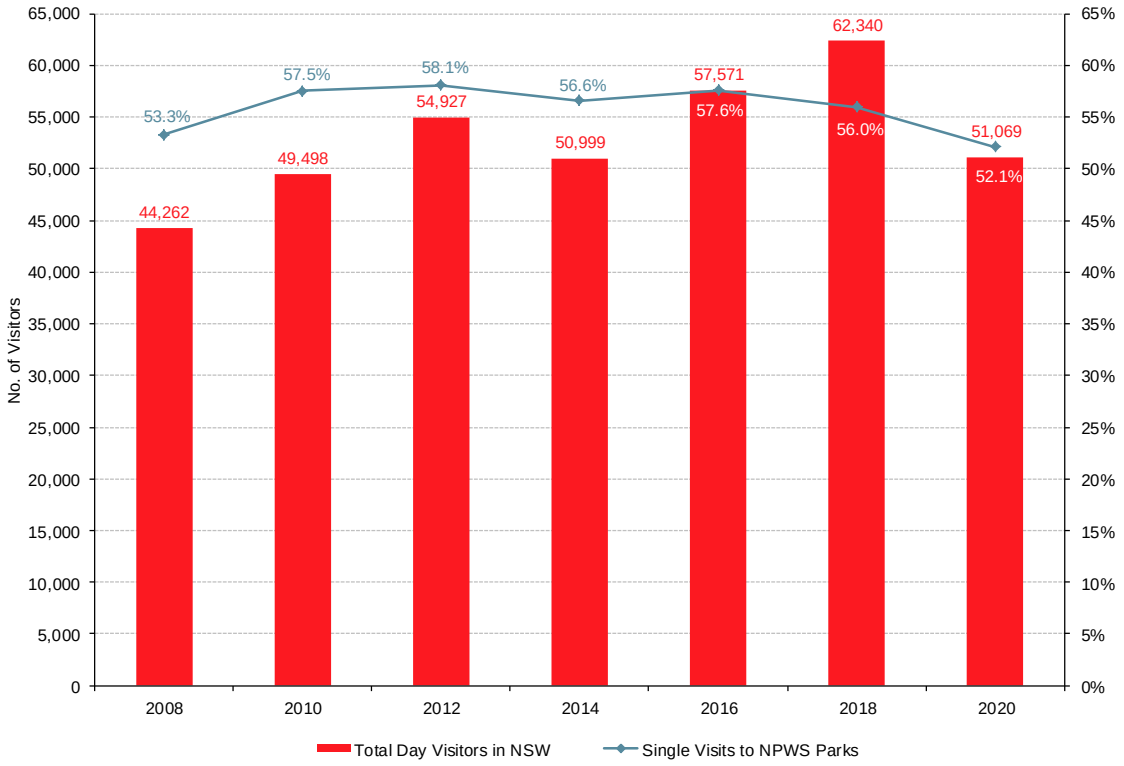


Sources: National Visitor Survey – Tourism Research Australia; NPWS Parks Visitor Surveys 2008-2018:

However, as multiple visits to parks do not necessarily equate to individual day visits (i.e. people can stay overnight at locations outside of parks and then visit the park during the day), survey data shows that in any given year only 4%-6% of park visitors camp or stay in accommodation at parks on their most recent visit. Comparison of day visitors to NSW destinations with those making *single visits* to NPWS parks will provide an indication of whether the day trip trend occurs for single park visits or not. (N.B. As the new question asking about *duration of trip* to a NPWS park was not asked until the 2018 survey, time series analysis cannot be undertaken using this question. Therefore *single visits* to a NPWS park has been used as a proxy for day trips to undertake this analysis).

Chart 43 shows that the proportion of single trip visits to NPWS parks has increased over time from 53.3% of visits in 2008 to 58.1% of visits in 2012, then declined to 56.6% in 2014 before increasing again to 57.6% in 2016. However, in 2018, the proportion of single visits declined to 56.0% while the number of day visitors to NSW increased – so the pattern of change differs in 2018. The trend then re-emerged for 2020, with a decline in single visits to 52.1% evident. However, the new question on duration of visit in 2018 to 2020 shows that 88% to 89% of NPWS visitors went just for the day, so once a longer time series for this question emerges, it may indicate that the trend in day trips to NPWS parks broadly follows the trend of day visitors to NSW. So whilst the trend in the proportion of single park visits is not as strong as the trend in day visitors, the pattern of single park visits does generally match the number of day trip visitors to NSW, indicating that there is likely to be a relationship between day visitors and single visits to NPWS parks (and hopefully day trips to NPWS parks going forward).

Chart 43: Single Visits to NPWS Parks versus Day Visitors in NSW

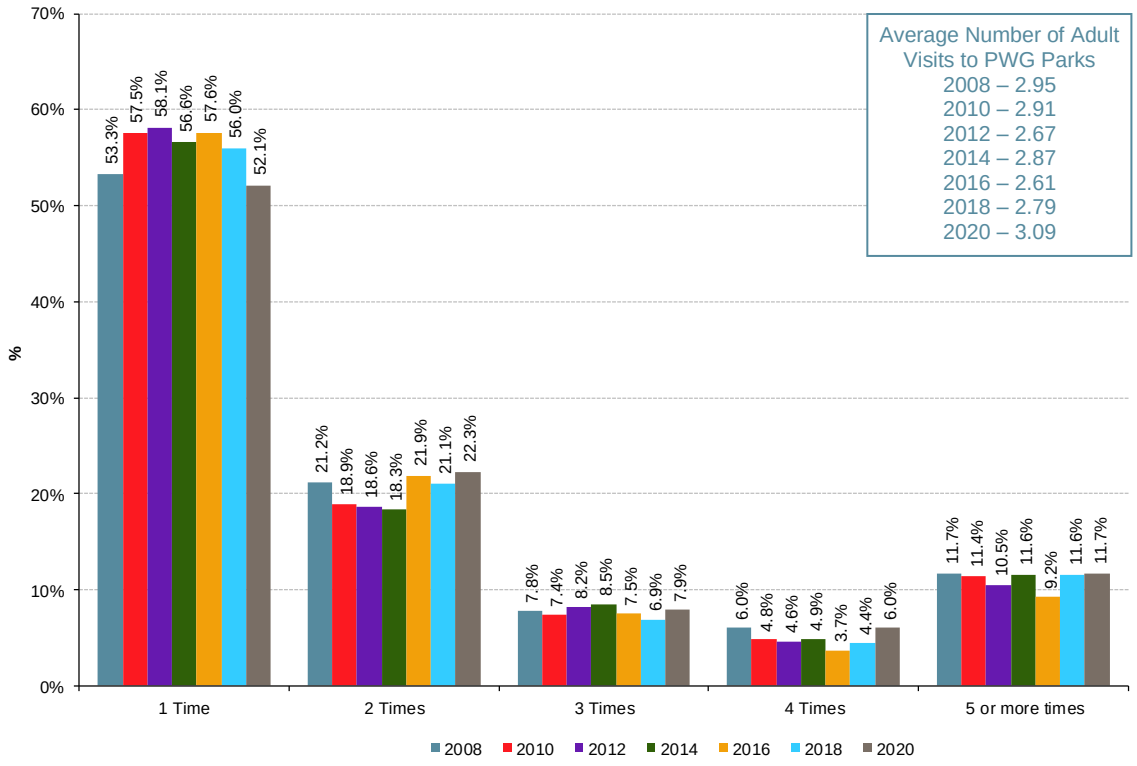


Sources: National Visitor Survey – Tourism Research Australia; NPWS Parks Visitor Surveys 2008-2018:

This trend in single visits to NPWS parks (which generally matches day visitors to NSW) and the overall trend in NPWS parks visits (which does not necessarily mirror overnight visitation to NSW), indicates that multiple visits to NPWS parks must not have been as strong in 2012 as it had been in previous years, but should have rebounded in 2014 through 2020.

In fact, as shown in Chart 44, there has been a downward trend from 2008 to 2014 in adults visiting NPWS parks *2 times* (which rebounded from 2016 to 2020). There was a downward trend from 2008 to 2012 for adults visiting *4 times* and *5 or more times* (with slight increases evident in 2014), then declining again in 2016, and returning to 2014 levels in 2018 and 2020. Only adults visiting NPWS parks *3 times* tended to exhibit a slight upward trend from 2010 to 2014, but again a decline was evident in 2016 and 2018, with an increase evident in 2020. Overall, these trends have resulted in a decline in the average number of adult visits made over time from 2008 to 2012 (from 2.95 visits in 2008 to 2.67 visits in 2012), with the average increasing to 2.87 visits in 2014, before declining again in 2016 to 2.61 visits and then increasing in 2018 to 2.79 visits and again in 2020 to 3.09 visits.

Chart 44: Number of Times Visiting a NPWS Park—Adult Visits



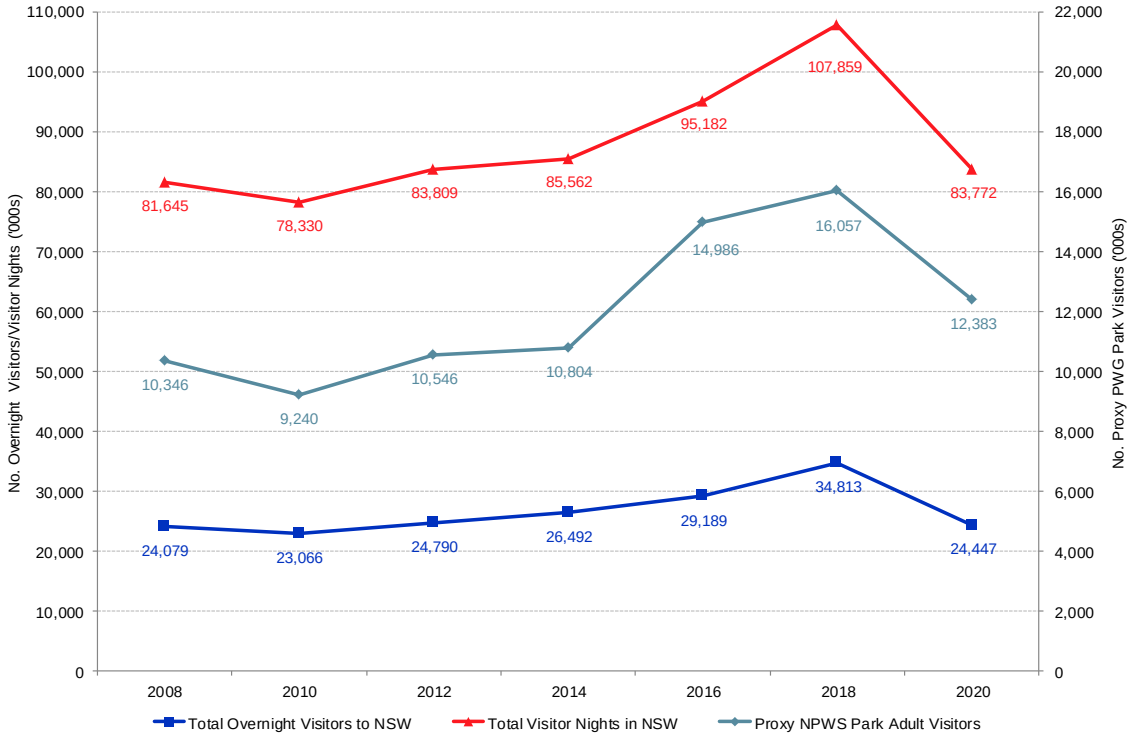
Source: NPWS Parks Visitor Surveys 2008 - 2020
Base: 2008 n=1,563; 2010 n=1,468; 2012 n=1,457; 2014 n=1,667; 2016 n=1,728, 2018 n=1,739; 2020 n- 1,178

If the number of adult visits is divided by the average number of visits, a *proxy* for the total number of visitors can be obtained[25]. Chart 45 shows that the proxy for NPWS park visitors exhibits the same trend as overnight visits to NSW and visitor nights in NSW, with 2012 numbers exceeding 2008 levels and 2014, 2016 and 2018 numbers steadily increasing to the highest so far recorded in each year, followed by the marked decline, resulting from Busfires and COVID-19 in 2020.

So in fact, NPWS park visitors trends do broadly mirror tourism visitation trends to NSW.

[25] Total visitors to NPWS parks cannot be accurately calculated from survey data as child visits are not captured on a park by park basis and adult visits do not take into account visits at different times of the year by the same respondent. As such only a proxy calculation of adult visitors can be determined.

Chart 45: Proxy NPWS Park Visitors versus Overnight Visitation to NSW



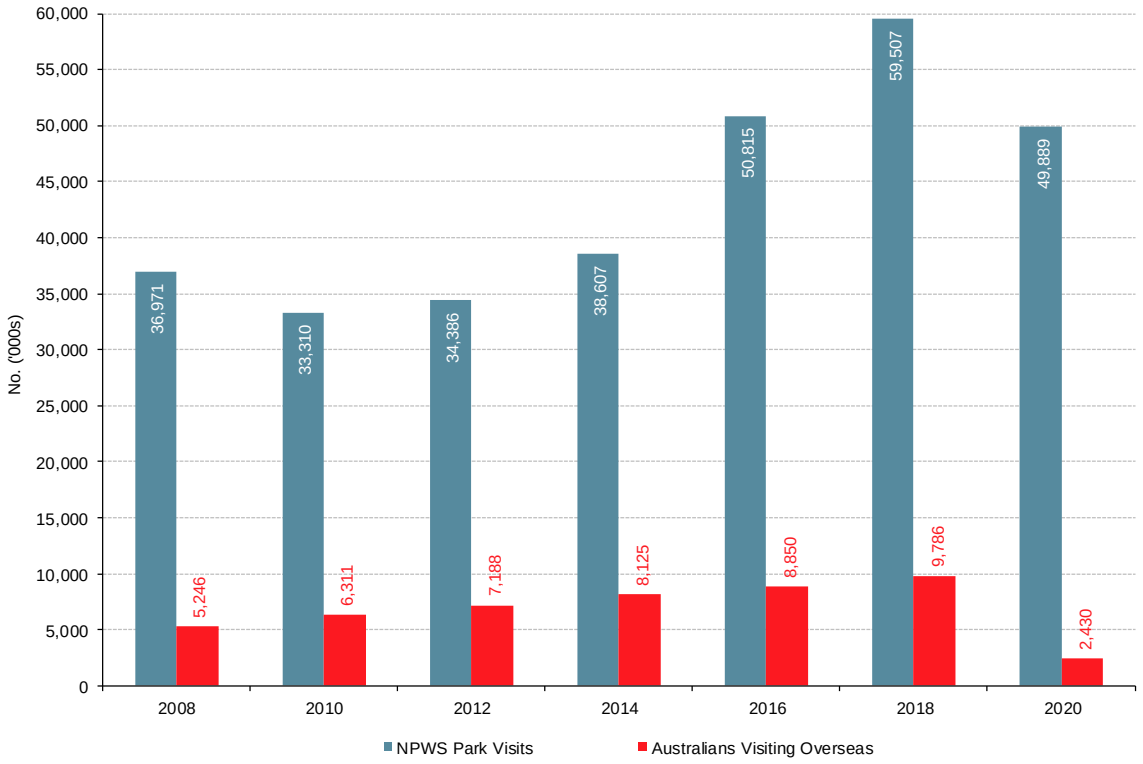
Sources: National Visitor Survey – Tourism Research Australia; NPWS Parks Visitor Surveys 2008-2018:

7.3 Visitation to Overseas Destinations

Another potential reason why NPWS park visits may vary from year to year is that exchange rates may make it more or less attractive to visit overseas destinations at the expense of domestic destinations. Chart 46 shows that Australians visiting overseas has increased from approximately 5.2m in 2008 to approximately 9.8m in 2018 – a growth of over 87% in 10 years, while NPWS park visits have increased by almost 61% over the same period. However, it can be seen that the decline in NPWS park visits from 2018 to 2020, while large, is not as marked as the number of Australians visiting overseas form 2018 to 2020 (16.2% and 75.2% respectively). The marked decline in Australians travelling overseas was due to international border closers due to COVID-19 in 2020. As 2020 was a unique year for international visitation, conclusions should not be drawn for any trends over time which include 2020 data.

Chart 47 compares monthly NPWS park visitation with exchange rates (i.e. the Trade Weighted Index divergence from the 8 year average). In 2008, exchange rates were low, making it relatively more expensive to take an overseas trip than take a domestic trip. In 2010, 2012 and 2014, exchange rates were high, making it relatively less expensive to take an overseas trip than a domestic one. Once again in 2016 through to 2020, exchange rates were low, making it relatively more expensive to take an overseas trip. So any decrease in capacity to undertake overseas visits may provide some positive impact on domestic NPWS park visits. This of course was not evident in 2020, due to COVID-19 restrictions and bushfires impacting on park visitation.

Chart 46: Annual NPWS Park Visitation versus Australians Visiting Overseas

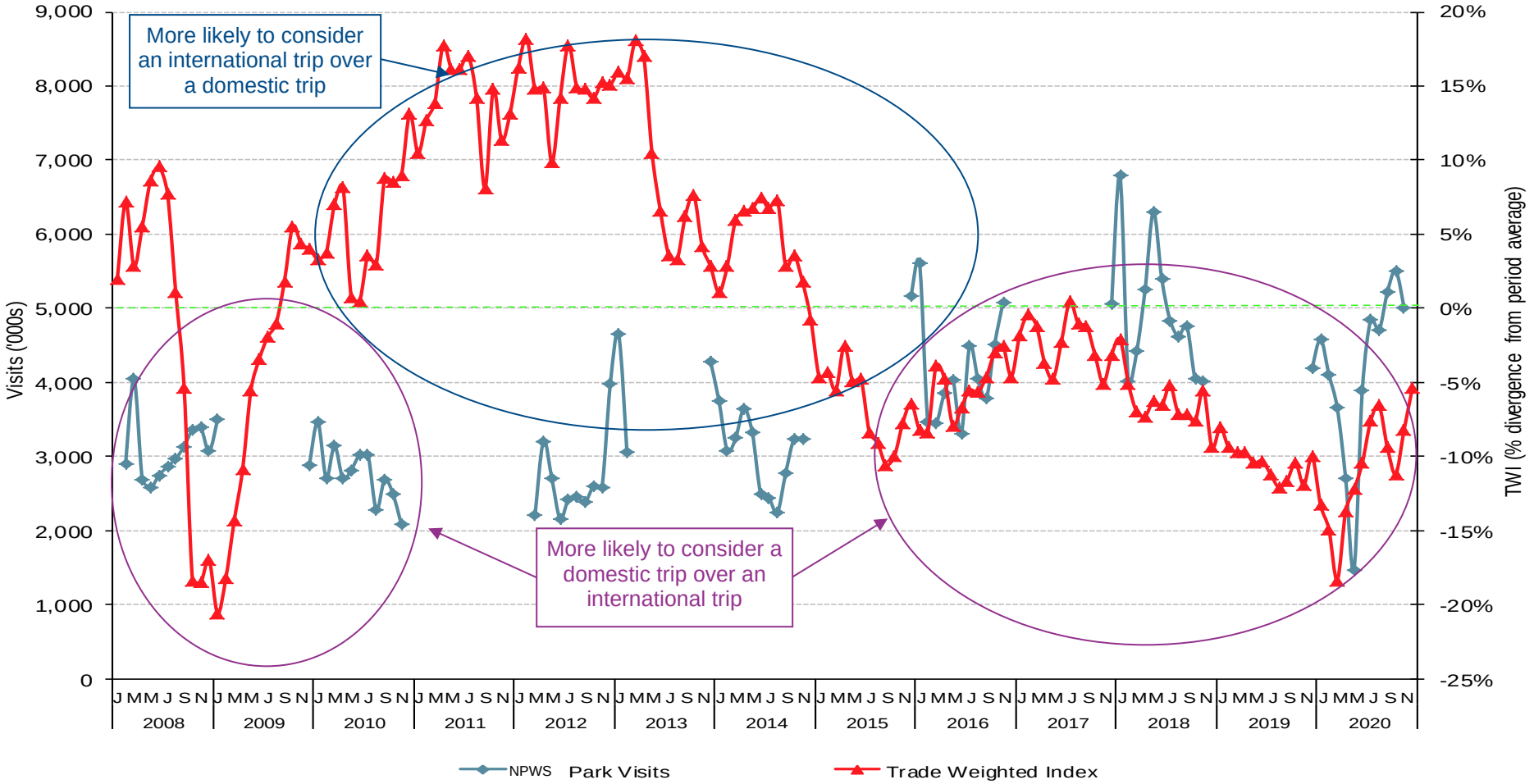


Sources: National Visitor Survey – Tourism Research Australia; NPWS Parks Visitor Surveys 2008-2018:

In 2012, overall NPWS park visits increased from 2010 levels, but this was not until the end of 2012, so for the bulk of 2012 NPWS park visits were also relatively low. Similarly in 2014, NPWS park visits increased, but this was mainly during the summer to autumn months of 2014 and after autumn visits again declined. In early 2016 NPWS visits were high, when exchange rates were at their least competitive for overseas travel. This again occurred in early 2018. In fact, there appears to be a peak in domestic park visits in the summer months of each year, when individuals and families are generally on extended holidays, while there are declines in domestic visitation during winter (the most likely time when residents will travel overseas i.e. the northern summer).

A strong Australian dollar encourages Australians to visit overseas at the expense of taking domestic trips – either reducing the total number of domestics trips made or reducing the length of stay. From overnight visitation data we know that the total number of visitor nights to NSW has increased by 31.6% from 2008 to 2018. However, the number of overnight visitors to NSW has increased by 43.5% over the same period. This means that overnight visitors are staying for shorter periods when going on overnight visits – i.e. length of stay for any one visit is decreasing. As we also know that the average number of NPWS park visits has been in decline from 2.95 in 2008 to 2.61 in 2016 (but increased to 2.79 in 2018), it can be postulated that a strong Australian dollar is having the same effect on park visitation as it is having on overnight visitation to NSW – the number of visitors is increasing, but the length of stay (i.e. number of visits) is decreasing.

Chart 47: Monthly NPWS Park Visitation versus Trade Weighted Index



Source: Reserve Bank of Australia—TWI is the weighted average of a basket of currencies against the Australian dollar (measures the relative purchasing power of the $AUD); NPWS Parks Visitor Surveys 2008-20208:

7.4 Economic Impacts

Economic factors may also play a role in impacting on visitation to NPWS parks. Lower interest rates may provide more disposable income to travel, as less money needs to be spent on mortgage repayments. Similarly, the lower the price of fuel the cheaper it is to travel, so domestic travel becomes more appealing. Furthermore, if people's confidence in the economy is high they are more likely to travel.

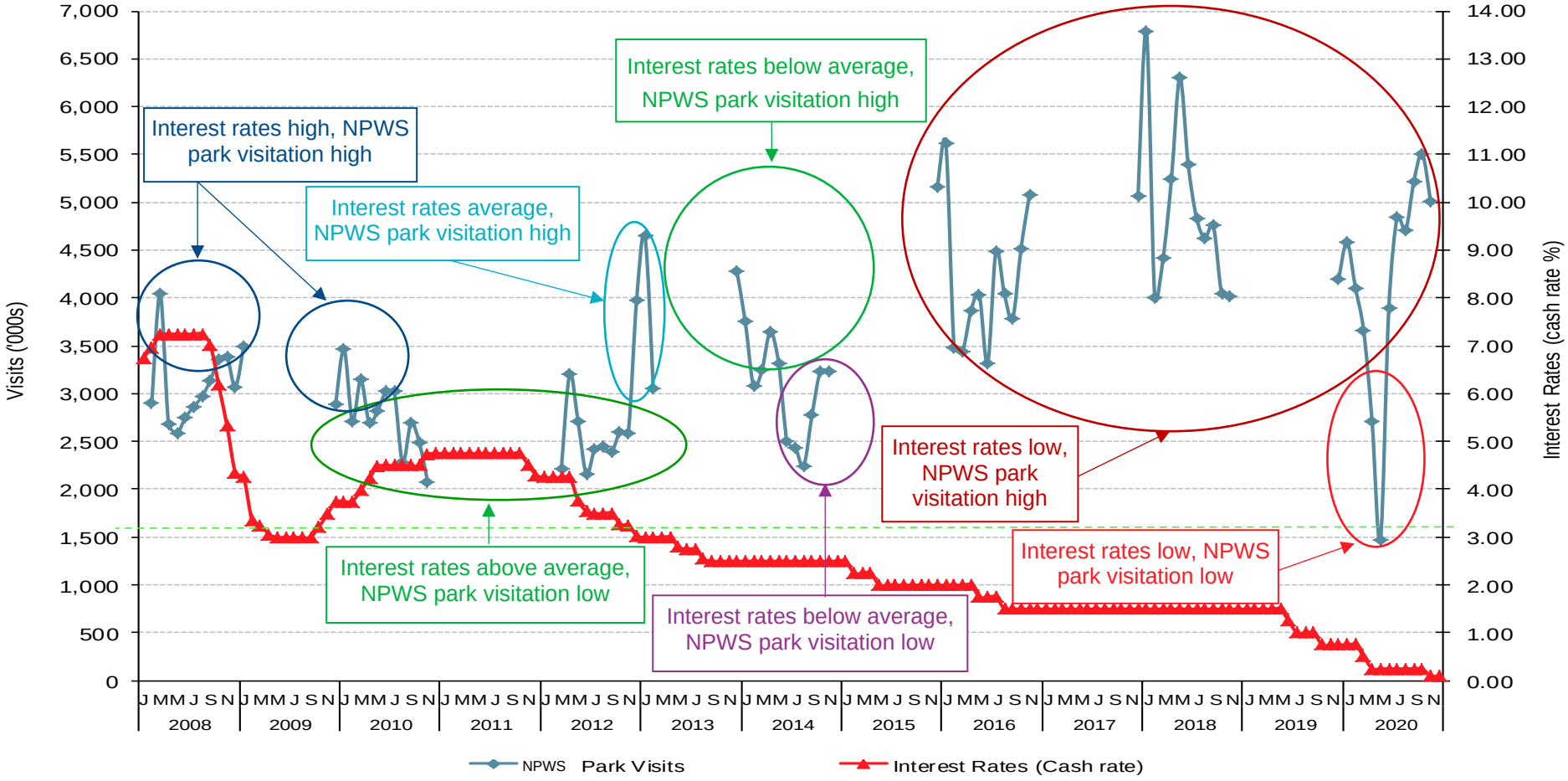
Chart 48 compares monthly NPWS park visitation with monthly interest rates. For the first nine months of 2008 interest rates were high (7.00%-7.25%), yet NPWS park visitation was high. 2009 saw interest rates fall sharply to 3.00% and then steadily rise in 2010 from 3.75% to 4.75%. This rise in interest rates coincided with lower levels of NPWS park visitation. For much of 2011 interest rates remained at 4.75%. However, from November 2011 interest rates began to fall, so that by the end of 2012 interest rates were at 3.00%. By September 2013 interest rates fell to 2.5% and remained there for all of 2014. At the start of 2016 interest rates were at 2.0% and have declined to 0.1% in 2020. However, NPWS park visitation was low in 2012, with peaks in visitation only occurring in early 2013. In 2014 NPWS park visitation was high until mid-year and then declined, while for all of 2016 and 2018 visitation has been high. Visitation declined due to COIVD-19 in autumn 2020, but has since rebounded to high levels.

Some fluctuations in interest rates in 2010 and 2012 tend to confirm what would be expected i.e. the lower the interest rate the greater the likelihood of spending on luxury items such as holidays (i.e. visits to parks). However, the high interest rates present in 2008 do not tend to explain the high levels of NPWS park visitation in 2008. Again in early 2014 and for all of 2016 and 2018 NPWS park visits were high, but interest rates were low, as would be expected. However, park visits were low in the second half of 2014, while interest rates remained low, which is counter-intuitive. It would appear that park visitation is not strongly linked with interest rates.

Chart 49 compares Roy Morgan Consumer Confidence with NPWS park visits. In general, when consumer confidence is low or below average, park visits are low (e.g. 2008, latter half of 2014, first half of 2020). Similarly, when consumer confidence is high or above average, park visits are high (e.g. first half of 2010, latter half of 2012, first half of 2014, 2016 and 2018). However, there is some evidence that when consumer confidence high, park visitation is low (e.g. latter half of 2010, first half of 2012) and when consumer confidence is low, park visitation is high (e.g. latter half of 2020). For the most part though, it does appear that there is a direct relationship between high consumer confidence and high park visitation.

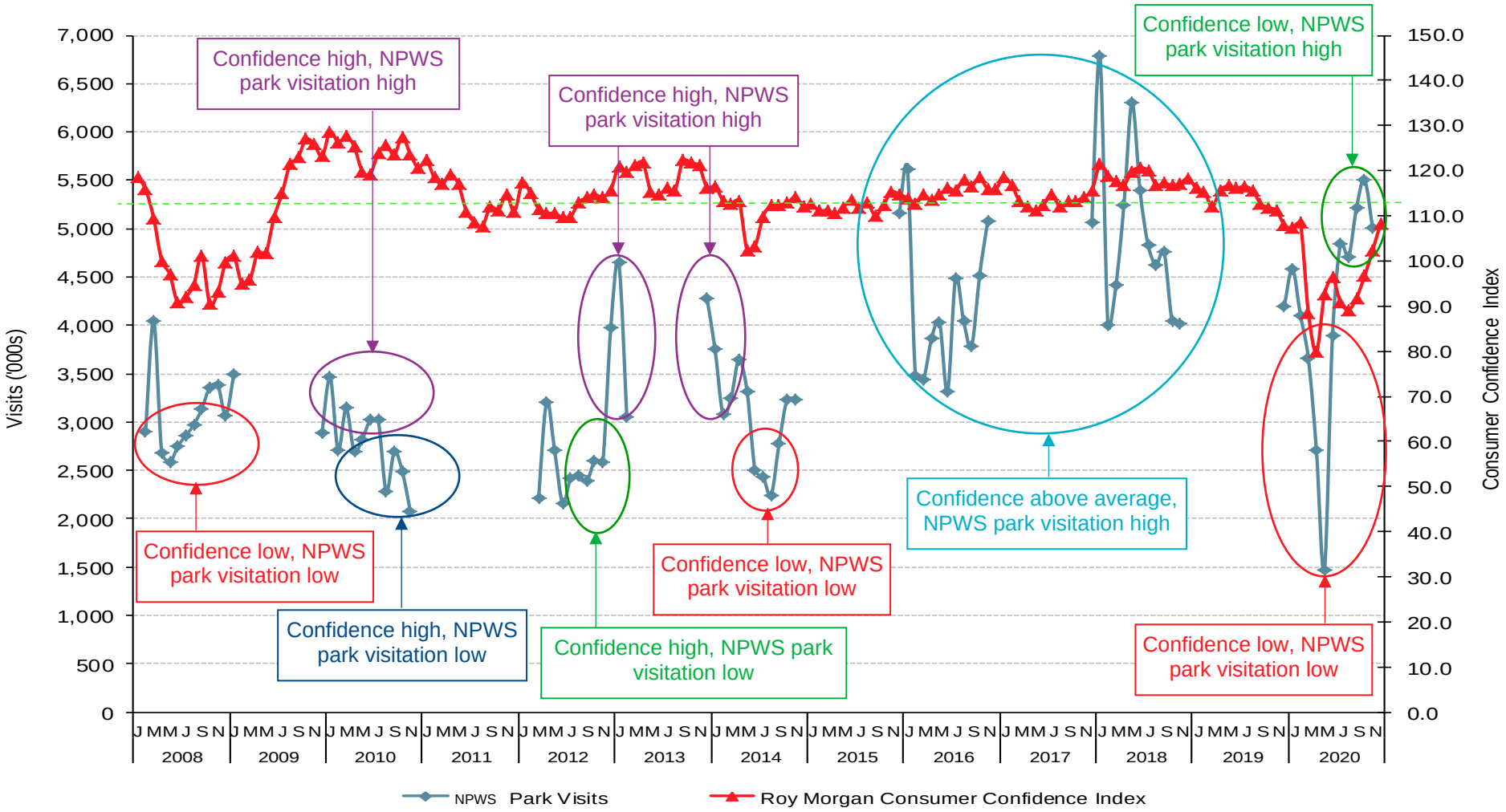
Chart 50 shows changes in monthly Sydney fuel prices compared with the average fuel price for the 13 year survey period. As can be seen, the general trend is that when fuel prices are higher than average, NPWS park visitation is lower at the corresponding part of that specific year, or when fuel prices are lower than average, NPWS park visitation is higher during the corresponding part of that specific year. However, there are periods when this apparent trend does not apply. At the end of 2012 and the start of 2014 and in the early to middle part of 2018, fuel prices are higher than average, yet NPWS visits are higher for the corresponding part of each specific year. In the middle of 2016 fuel process are low, yet NPWS park visitation is high for 2016 at that time. From the onset of COIVD-19 restrictions in March 2020 fuel prices and NPWS park visits tend to mirror each other. Based on the above information it would appear that a relationship between fuel prices and NPWS park visitation is at best weak or possibly non-existent.

Chart 48: Monthly NPWS Park Visitation versus Interest Rates



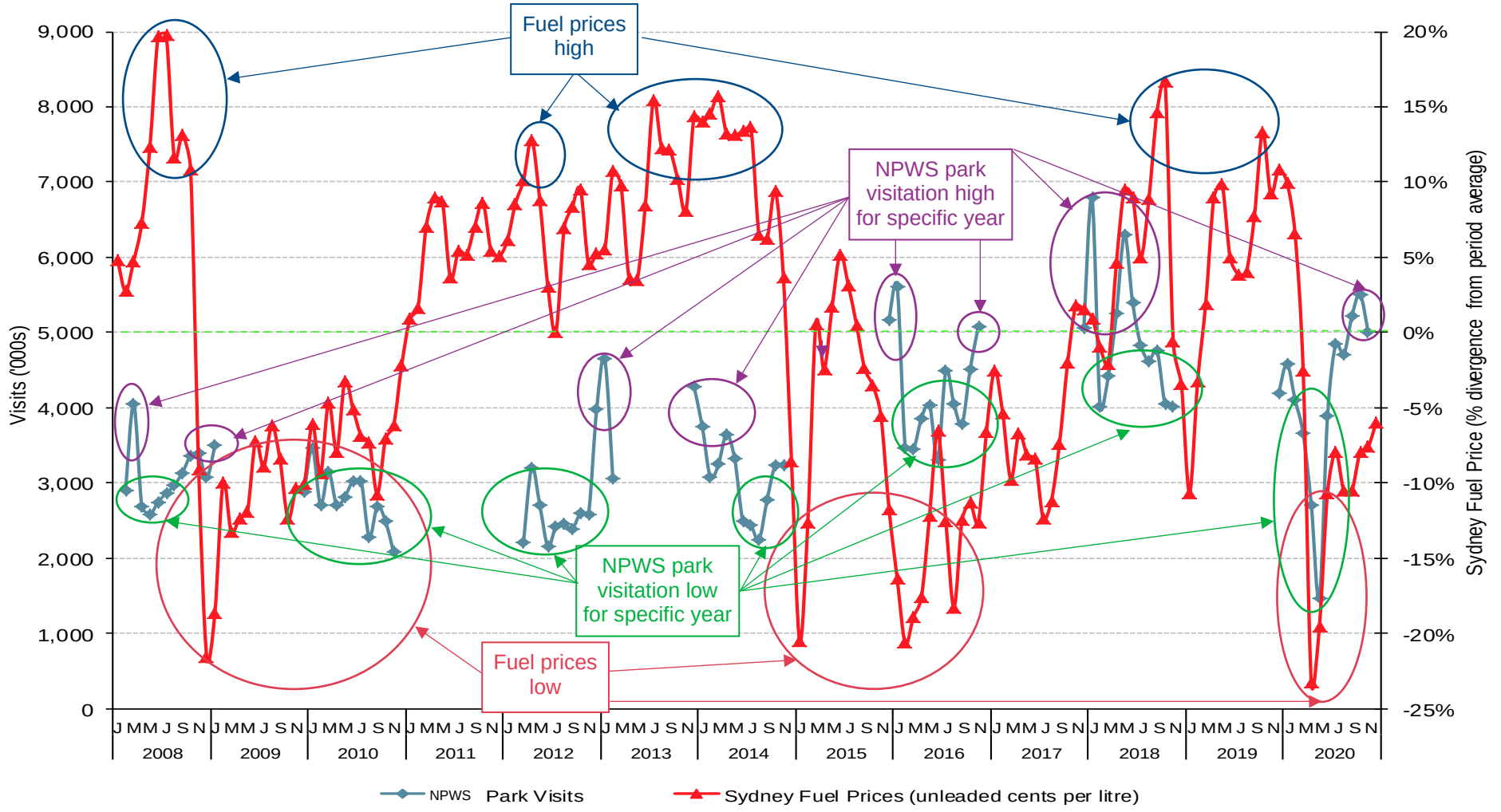
Source: Reserve Bank of Australia—Cash Rate

Chart 49: Monthly NPWS Park Visitation versus Consumer Confidence



Source: Roy Morgan Single Source: Roy Morgan Consumer Confidence

Chart 50: Monthly NPWS Park Visitation versus Sydney Fuel Prices



Source: Royal Automobile Club of Queensland – Monthly Fuel Price Report – Average ULP Price (cents per litre)

7.5 Weather Effects

Detailed investigations undertaken for the 2010 survey indicated that NPWS park visitation patterns were impacted by weather, particularly significant weather events. This is perhaps not surprising given parks mainly offer an outdoor nature based experience. This section looks at three weather factors and their indicative impact on park visitation – temperature, rainfall and significant and sustained weather events from 2008 to 2020. All weather data provided in this section comes from the Bureau of Meteorology's (BoM) Climate Data Online service.

7.5.1 Temperature Effects on NPWS Park Visitation

Chart 51 compares monthly NPWS park visitation to monthly maximum daytime temperatures displayed as a divergence from the average[1]. From 2008 to 2012 and again from 2016 to 2018 there appears to be a relationship between NPWS park visitation and temperature – namely, the higher the temperature above the average, the greater the number of park visits. However, this indicative relationship does not hold true for 2014 and 2020 in that, as temperature increases above the average, park visitation decreases.

Charts 52 to 59 compare the temperature with NPWS park visitation at the NPWS Branch level.

As temperature increases above the average, visits to parks in *Greater Sydney Branch* tend to decrease. This has been the case since 2012 (to 2020). However, from, 2008 to 2010, the opposite trend occurred. The general trend is the direct opposite to the state-wide trend where temperatures above the average tend to result in increased visits.

In survey years 2008, 2014, 2016 and 2018 visits to parks in the *North Coast Branch* tended to decrease as temperature increased above the average. However, in 2010 and 2012 the opposite trend was evident.

There does not appear to be a decided trend in visits to the *Hunter Central Coast Branch* based on temperature. For the years 2008, 2010 and 2018, as temperature increased above the average, visits increased. However, from 2012 to 2016 and again in 2020 the opposite trend was evident.

Similarly for visits to the *Blue Mountains Branch* no trend in visitation was evident. In 2008, 2016 and 2018 visits increased as temperature above the average increased, but from 2010 to 2014 and in 2020, the opposite was the case.

Visitation trends were again mixed for the *South Coast Branch*, with visitation declining as temperature increased above the average in 2008, 2012, 2014 and 2020, but trended in the opposite direction in 2010, 2016 and 2018.

For visits to the *Southern Ranges Branch* visitation increased as temperature increased above the average in 2008, 2010 and 2014, but visitation decreased as temperature increased above the average in 2012 and 2016 to 2020.

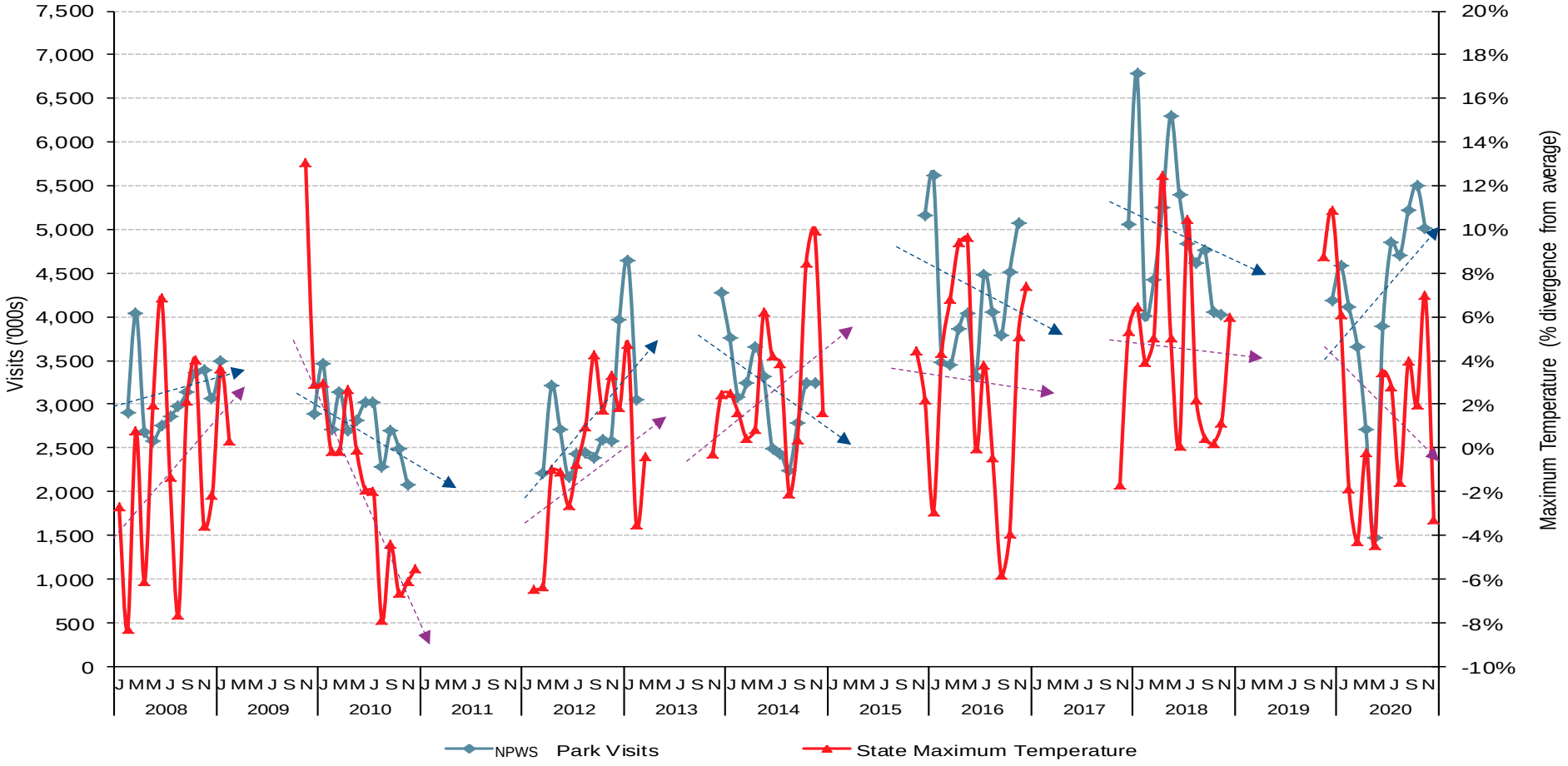
[1] Divergence from the average is calculated using 51 weather stations across the state, representing each NPWS Region. Average is based on the BoM average for each weather station.

Analysis of visitation to parks in the *Northern Inland Branch* should be treated with caution due to small sample sizes. However, visits generally tended to increase when temperature was above the average in 2008, 2012, 2016 and 2018, but declined with temperature in 2010, 2014 and 2020.

Visitation to parks in the *West Branch* should be analysed with extreme caution due to extremely low sample sizes. However, from 2008 to 2014 visitation tended to decrease as temperature increased above the average, but tended to increase when temperature decreased from 2016 to 2020.

It therefore appears that the temperature-visitation correlation of high visits at times when the temperature is above average is weak and is certainly subject to variation at the regional level across each year. For the state as a whole the correlation is slightly more definitive, with the opposing trend only evident in 2014 and 2020. The 2020 trend in visitation is more likely to be the result of difficulty accessing parks due to bushfires and COVID-19 restrictions rather than due to fluctuations in temperature.

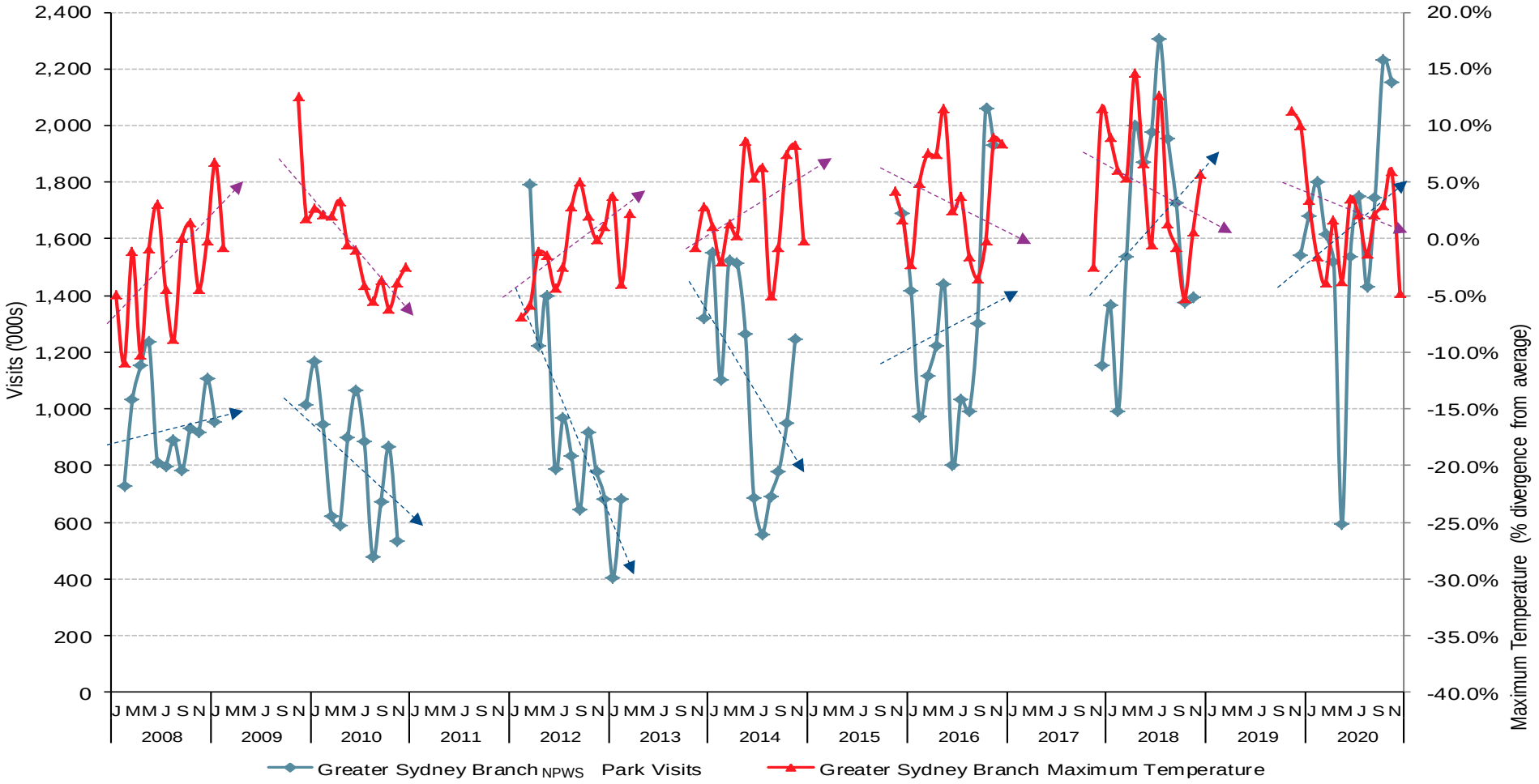
Chart 51: Monthly NPWS Park Visitation versus Monthly Temperature[27]



Source: Bureau of Meteorology – Climate data online 20018-2020 – Mean maximum temperature = Average of 51 weather stations across NSW.

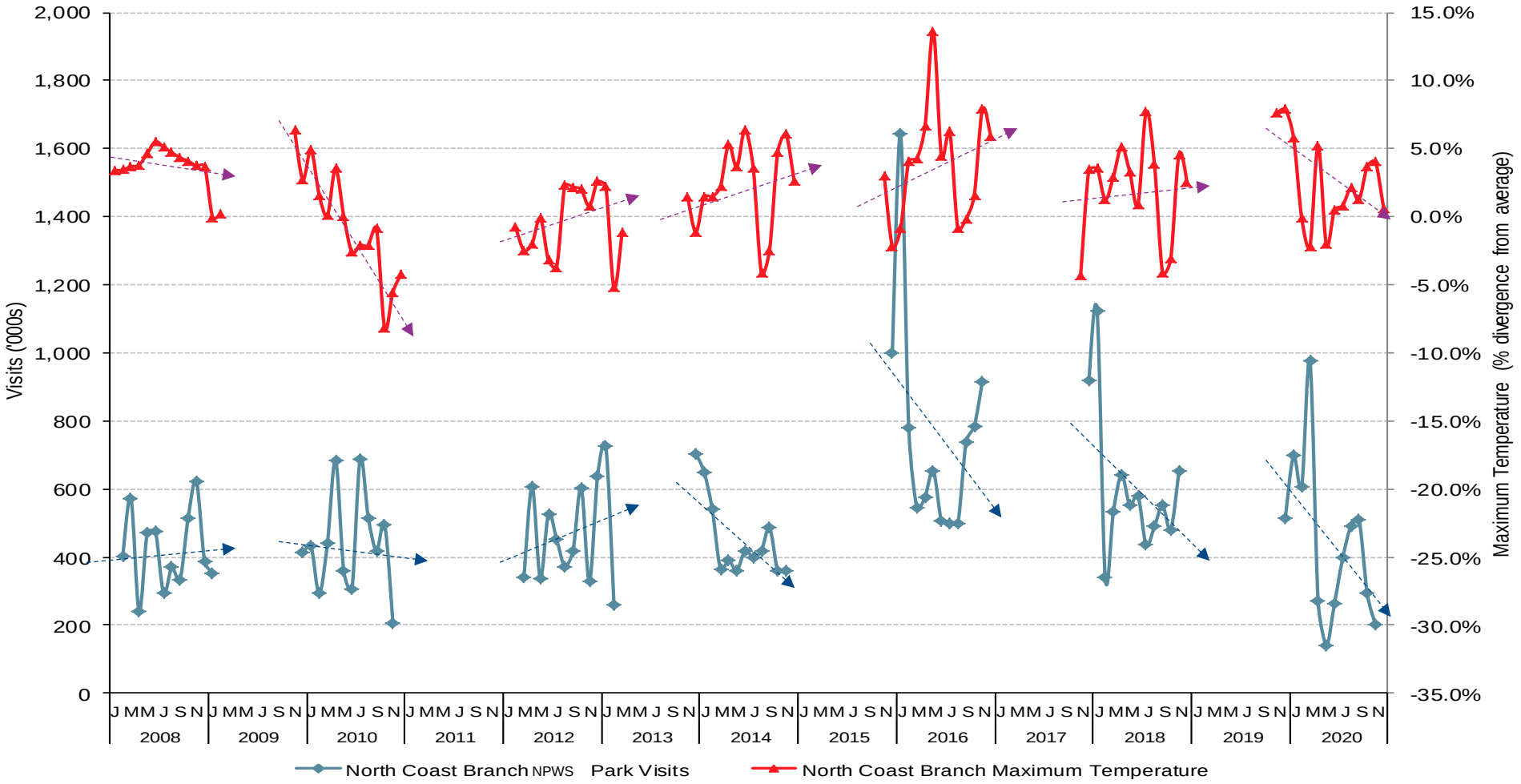
[27] Linear trend lines have been fitted to assist with description of findings for this chart and all following charts.

Chart 52: Monthly NPWS Park Visitation versus Monthly Temperature - Greater Sydney Branch



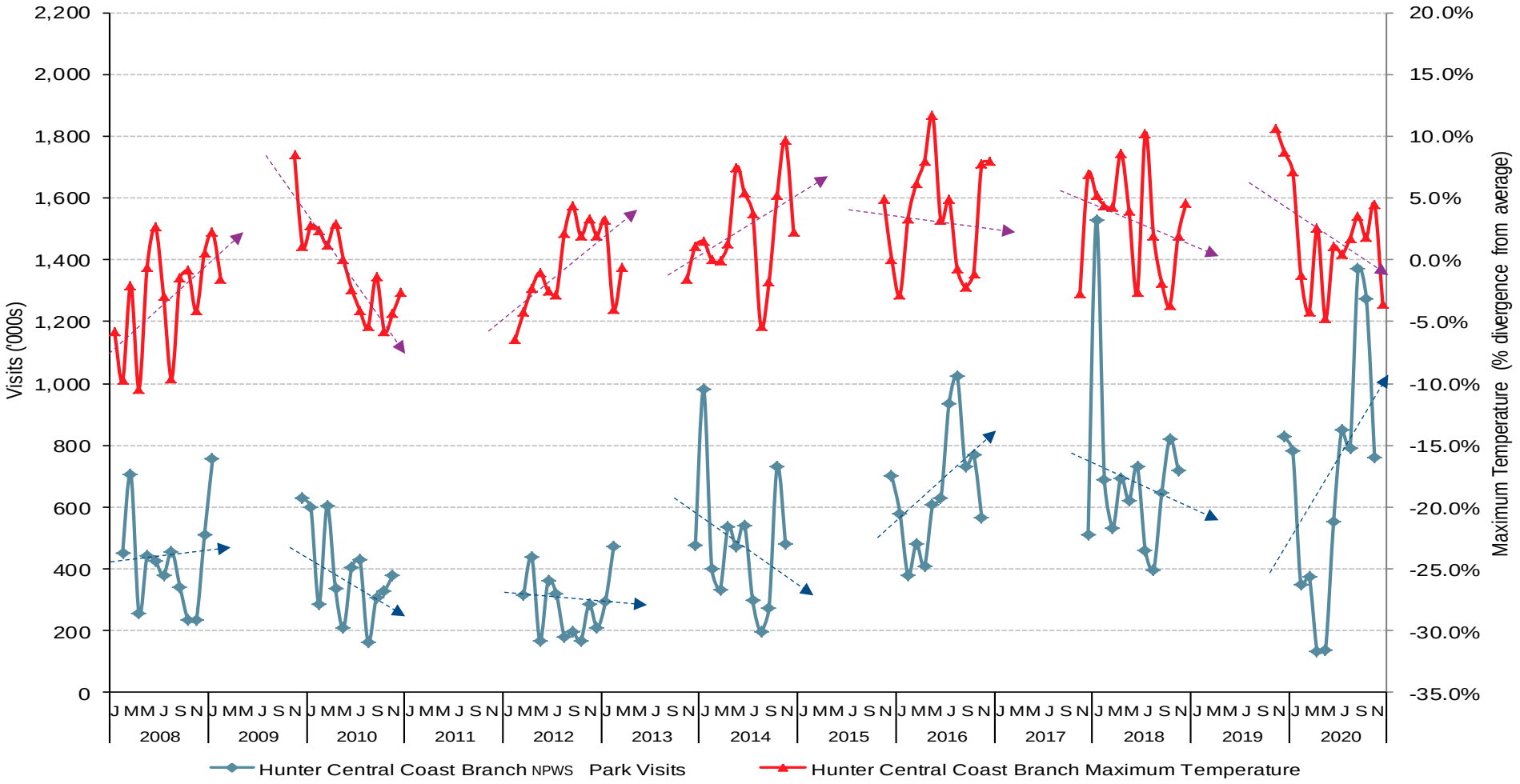
Source: Bureau of Meteorology – Climate data online 20018-2020 – Mean maximum temperature = Average of 4 weather stations across the Greater Sydney Branch geographic region.

Chart 53: Monthly NPWS Park Visitation versus Monthly Temperature - North Coast Branch



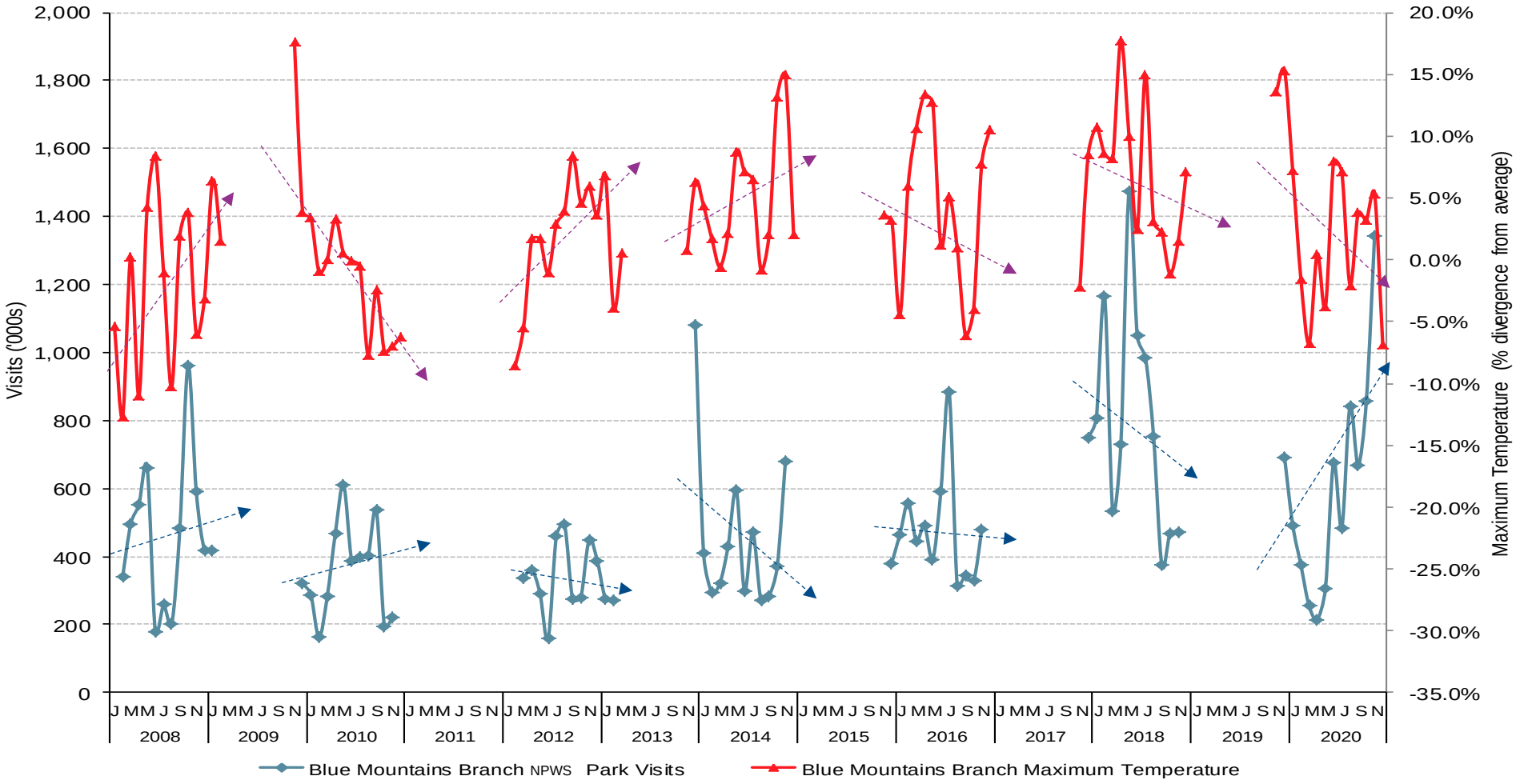
Source: Bureau of Meteorology – Climate data online 20018-2020 – Mean maximum temperature = Average of 8 weather stations across the North Coast Branch geographic region.

Chart 54: Monthly NPWS Park Visitation versus Monthly Temperature - Hunter Central Coast Branch



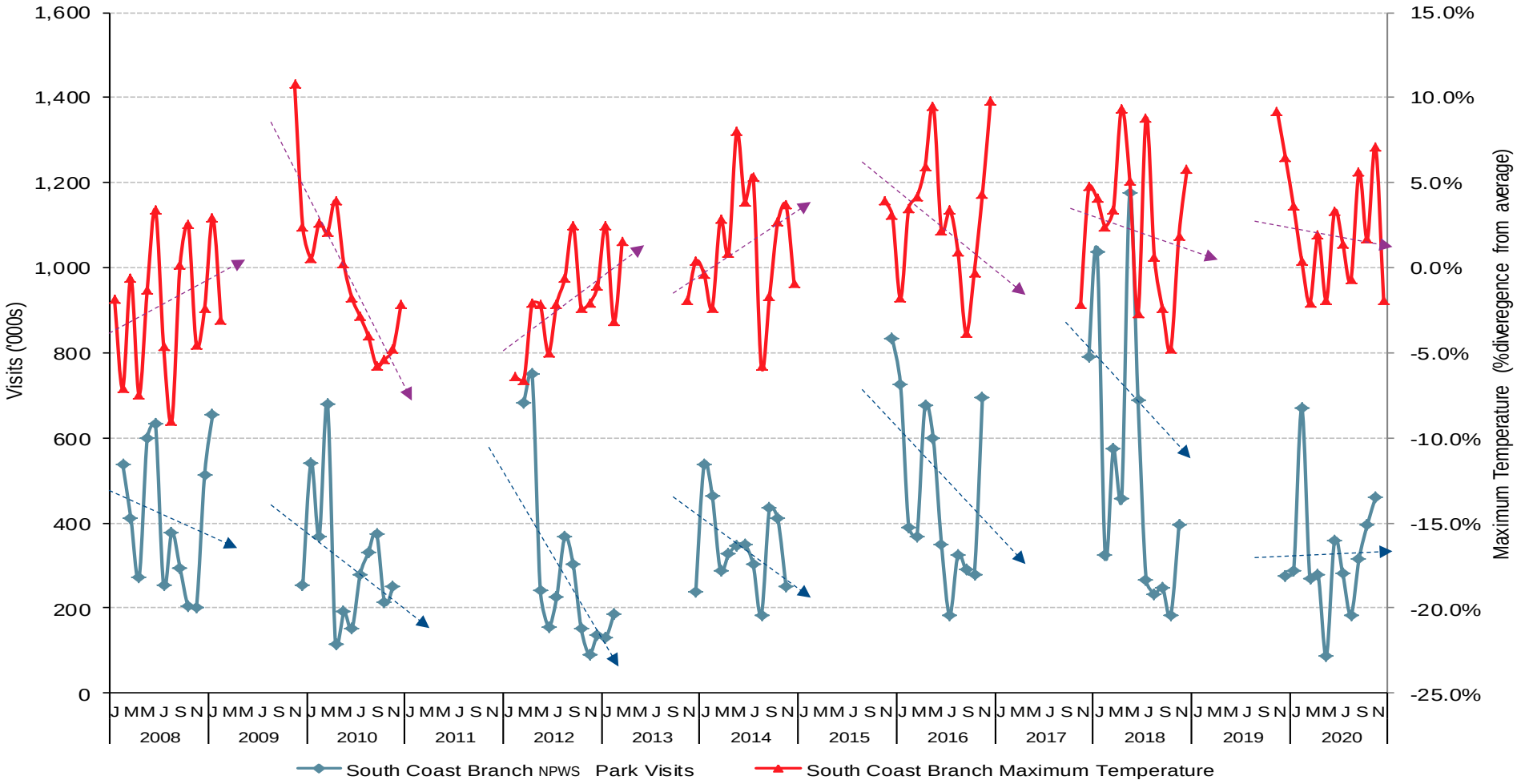
Source: Bureau of Meteorology – Climate data online 20018-2020 – Mean maximum temperature = Average of 8 weather stations across the Hunter Central Coast Branch geographic region.

Chart 55: Monthly NPWS Park Visitation versus Monthly Temperature - Blue Mountains Branch



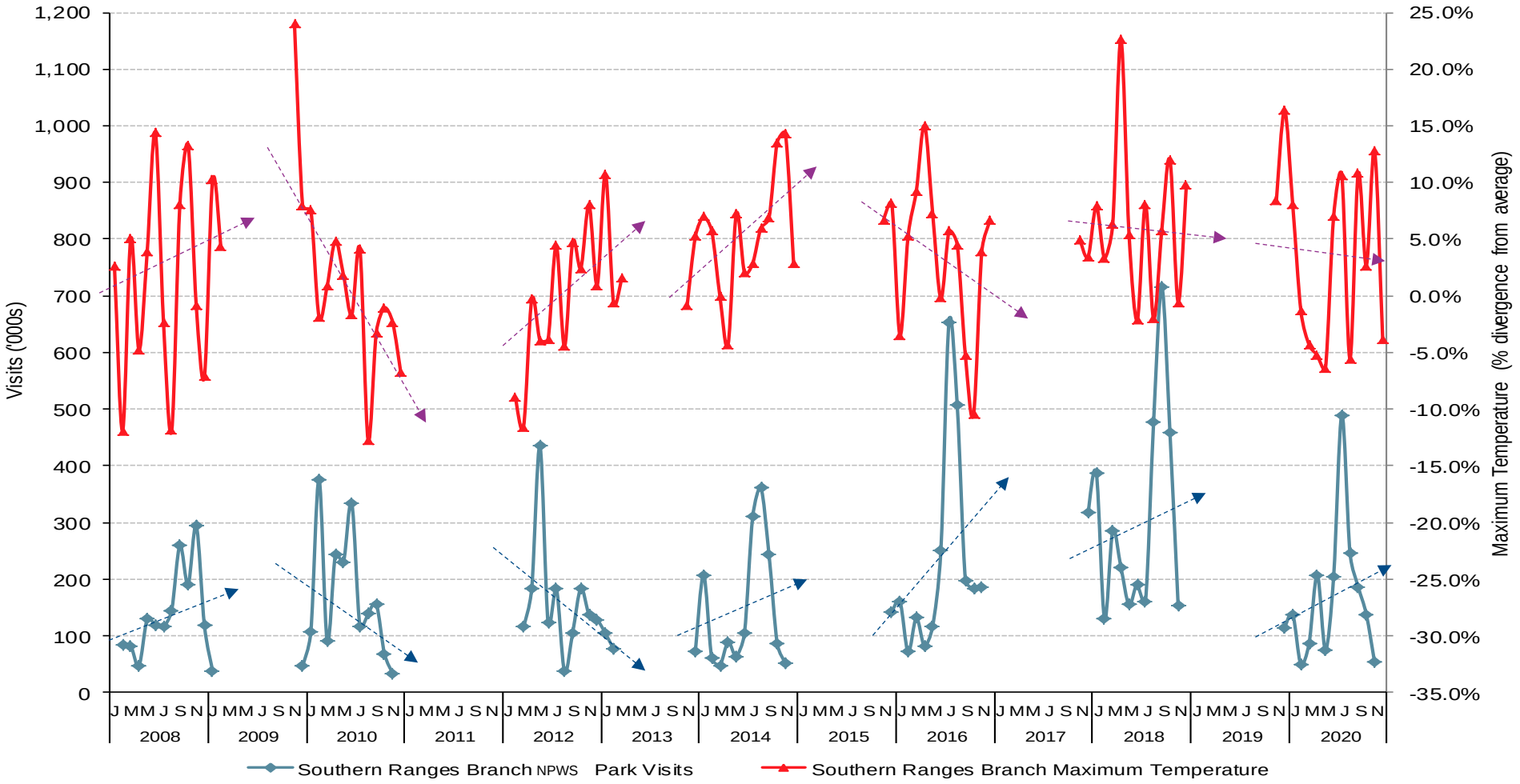
Source: Bureau of Meteorology – Climate data online 20018-2020 – Mean maximum temperature = Average of 6 weather stations across the Blue Mountains Branch geographic region.

Chart 56: Monthly NPWS Park Visitation versus Monthly Temperature - South Coast Branch



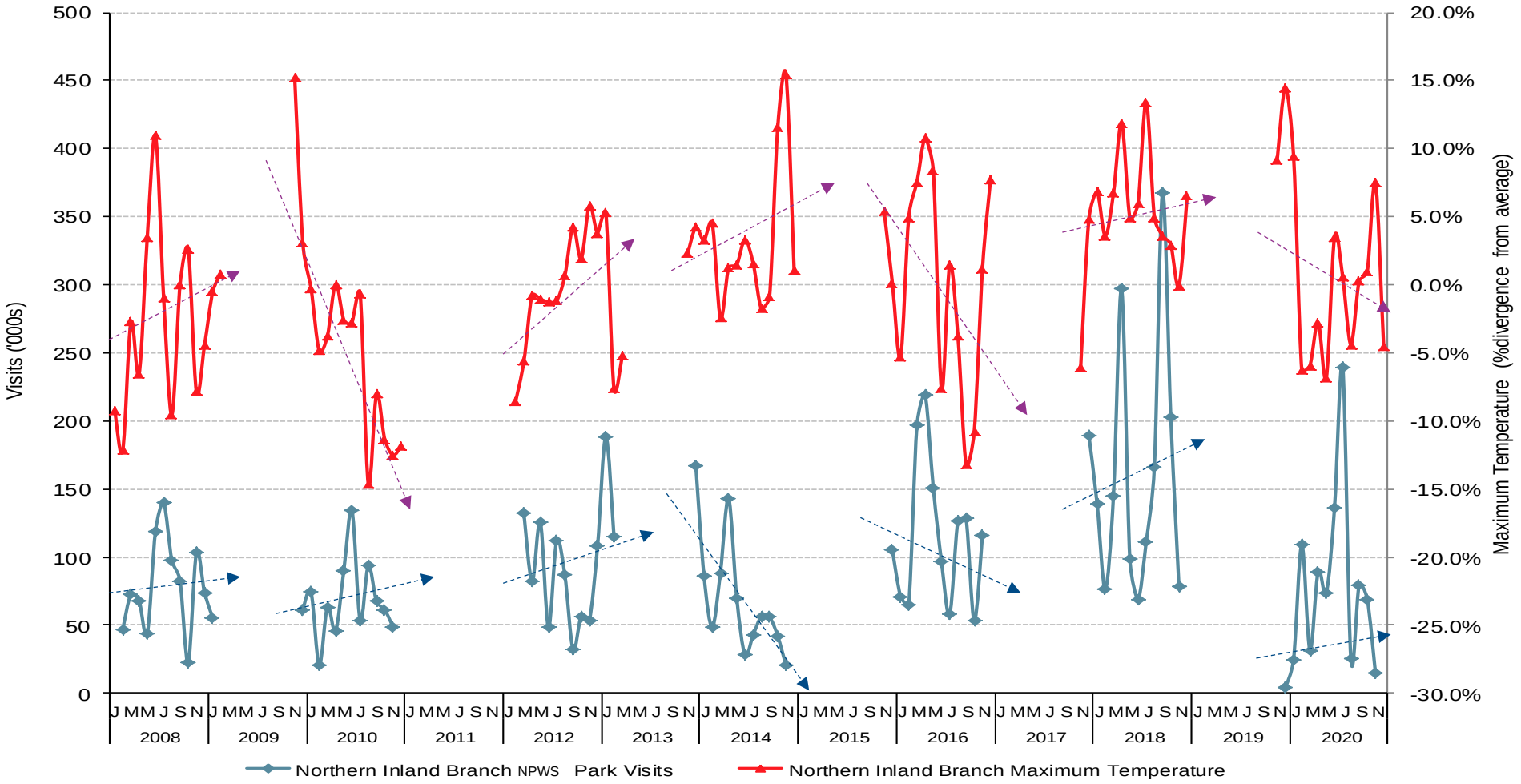
Source: Bureau of Meteorology – Climate data online 20018-2020 – Mean maximum temperature = Average of 7 weather stations across the South Coast Branch geographic region.

Chart 57: Monthly NPWS Park Visitation versus Monthly Temperature - Southern Ranges Branch



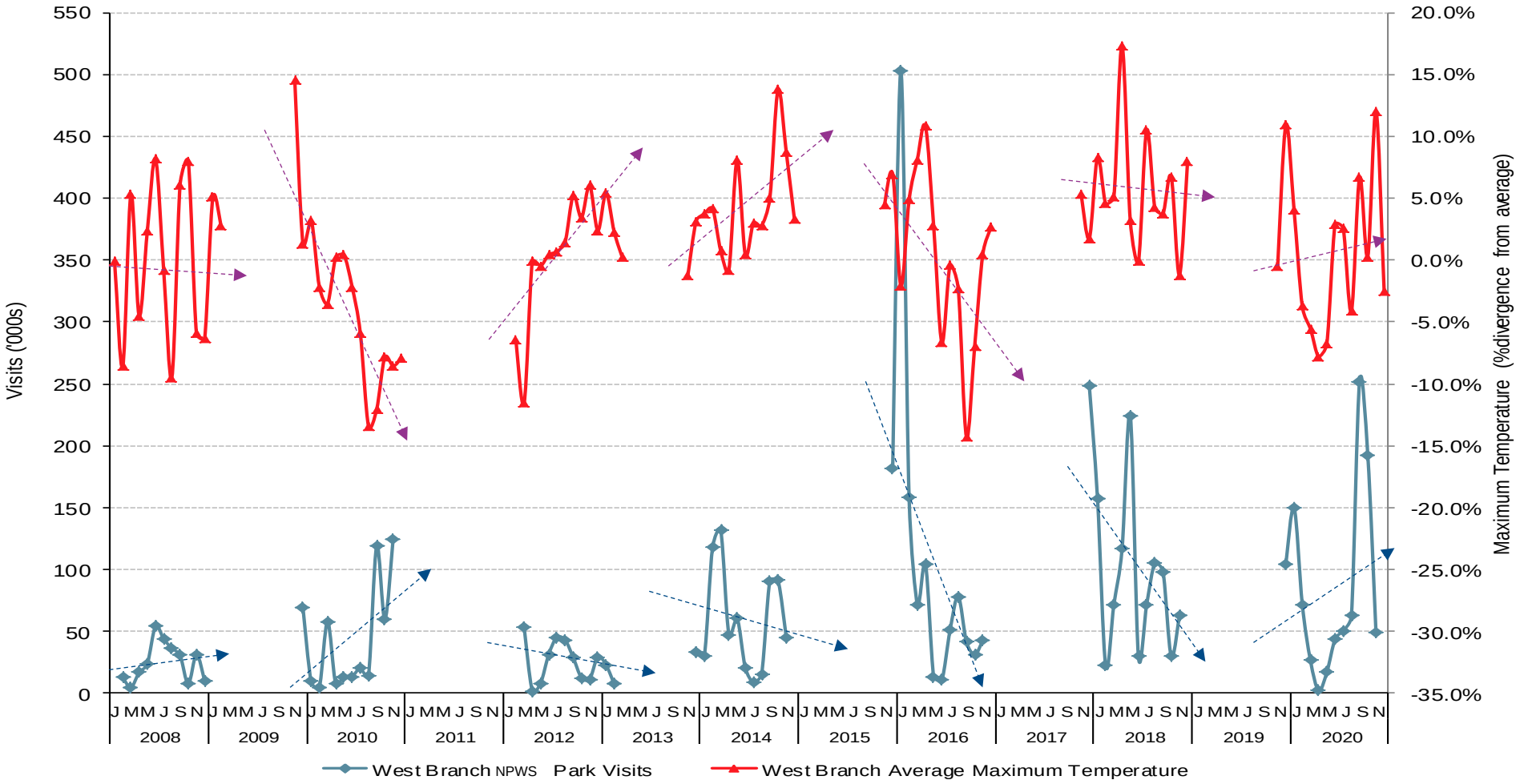
Source: Bureau of Meteorology – Climate data online 20018-2020 – Mean maximum temperature = Average of 6 weather stations across the Southern Ranges Branch geographic region.

Chart 58: Monthly NPWS Park Visitation versus Monthly Temperature - Northern Inland Branch



Source: Bureau of Meteorology – Climate data online 20018-2020 – Mean maximum temperature = Average of 7 weather stations across the Northern Inland Branch geographic region.

Chart 59: Monthly NPWS Park Visitation versus Monthly Temperature - West Branch



Source: Bureau of Meteorology – Climate data online 20018-2020 – Mean maximum temperature = Average of 5 weather stations across the West Branch geographic region.

7.5.2 Rainfall Effects on NPWS Park Visitation

Chart 60 compares monthly NPWS park visitation to monthly rainfall displayed as a divergence from the average[28]. From 2008 to 2014 there appears to be a general opposing trend between visitation and rainfall - the more rainfall was above the average, the fewer visits. In 2016 and in 2020 a weak counter trend was evident – the more rainfall was above the average, the more visits there were. However, in 2018 the original trend observed from 2018 to 2014 was evident.

It should be noted that, for the most part, 2016 was dry, with high rainfall in 3 months (January, June and September). These rainfall events may have skewed averages, influencing the general rainfall-visitation relationship. In 2020 bushfires and COVID-19 restrictions were more likely to impact on park visitation than was rainfall, so any relationship between rainfall and visitation in 2020 is likely to be less evident.

Across any given year, peaks in visitation generally tended to correspond with troughs in rainfall. In addition, rainfall is more likely to impact on visitation if it is raining at both the origin of the visitor, as well as at the visitor's intended destination and is therefore more likely to impact on visitation at the regional level.

Chart 61 to Chart 68 compares rainfall with NPWS park visitation at the NPWS Branch level. In 2008 and 2010 and again in 2014 and 2016, visitation to parks in the *Greater Sydney Branch* tended to fall as rainfall increased above the average. However, in 2012 and again in 2018 and 2020, visitation decreased as rainfall decreased below the average.

Visitation to parks in the *North Coast Branch* tended to decrease as rainfall increased above the average, as observed in 2008, 2010, 2014, 2018 and 2020. However, the opposite trend emerged in 2012 and 2016.

Visitation to parks in the *Hunter Central Coast Branch* followed a general trend whereby visitation increased when rainfall decreased below the average. The only years in which this trend was not evident was in 2012 where a weak downward trend in rainfall below the average was paired with a weak decline in visits over the course of the year and in 2020 where bushfires and COVID-19 restrictions are more likely to have a greater impact on park visitation than rainfall.

In 2008, 2012, 2014 and 2018 visitation to parks in the *Blue Mountains Branch* tended to increase when rainfall decreased below the average. However, in 2010, 2016 and 2020 the opposite trend was evident.

For the *South Coast Branch* visitation increased as rain increased above the average in 2008, 2012 and from 2016 to 2020, but behaved in the opposite manner in 2010 and 2014.

Visitation to the *Southern Ranges Branch* increased as rain fell below the average in 2008, 2010 and 2018, but the opposite trend was evident from 2012 to 2016 and in 2020.

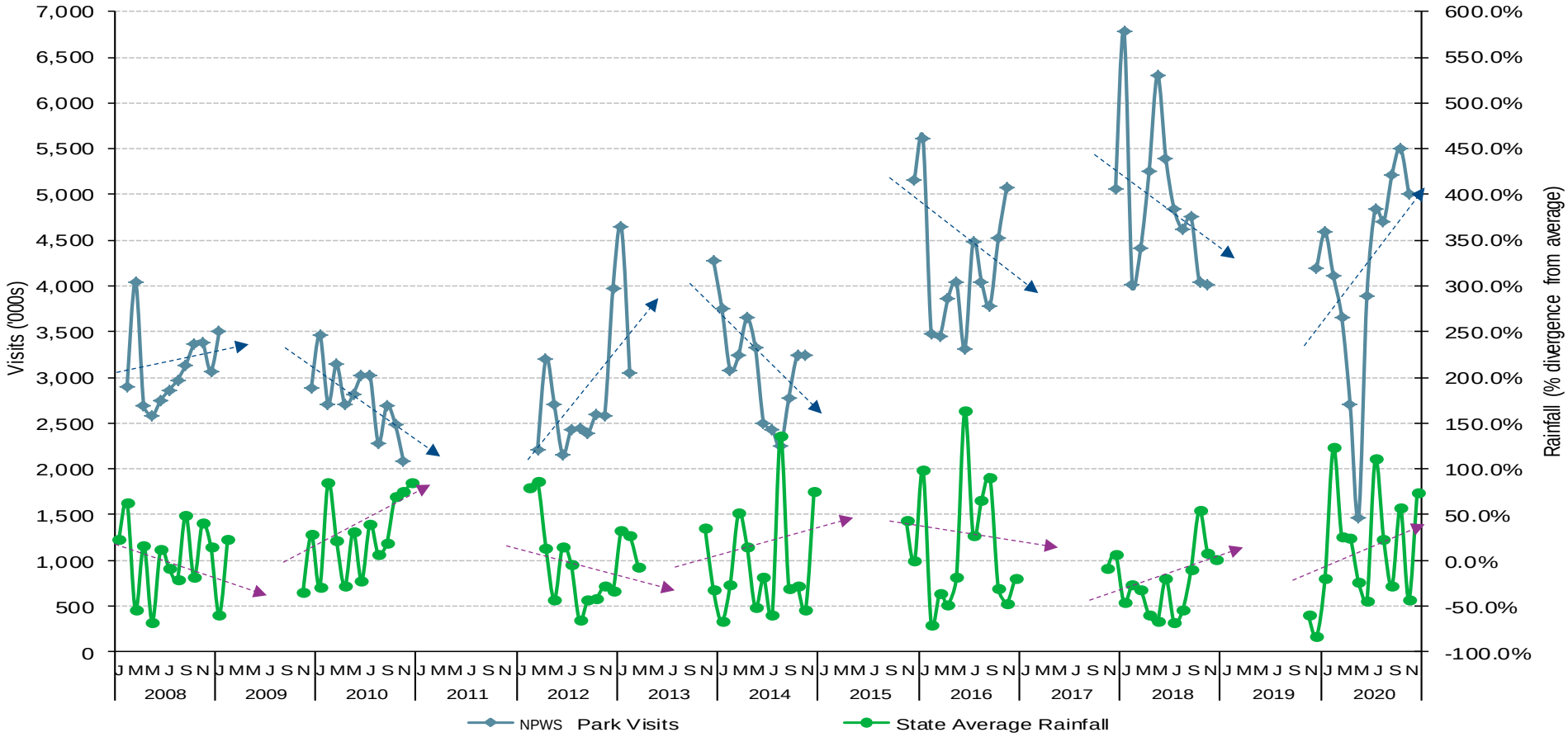
[28] Divergence from the average is calculated using 51 weather stations across the state, representing each NPWS Region. Average is based on the BoM average for each weather station.

Visitation to parks in the *Northern Inland Branch* should be analysed with caution due to small sample sizes. In 2008, 2010, 2018 and 2020 visitation tended to increase as rainfall increased above the average, but tended to decrease with rainfall from 2012 to 2016.

Analysis of visitation to parks in the *West Branch* should be treated with extreme caution due to extremely small sample sizes. However, from 2008 to 2014 and again in 2018 visits tended to increase when rainfall was above the average. However, in 2016 and 2020 the opposite trend was evident.

In terms of climate (i.e. temperature and rainfall variations), it would appear that there was a general trend from 2008 to 2014 that as rainfall increased above the average, NPWS park visitation decreased. This trend was again evident in 2018. The relationship between rainfall and park visitation tends to be slightly stronger than the temperature trend. Of course, it should be noted these trends are based on an average for the state of NSW as a whole or based on selected weather stations in each Branch. Furthermore a combination of weather conditions at both the visitor's home (region of origin) *and* their intended destination is likely to be a key but complex determinant of park visit decision making and ultimately visitation at the regional level.

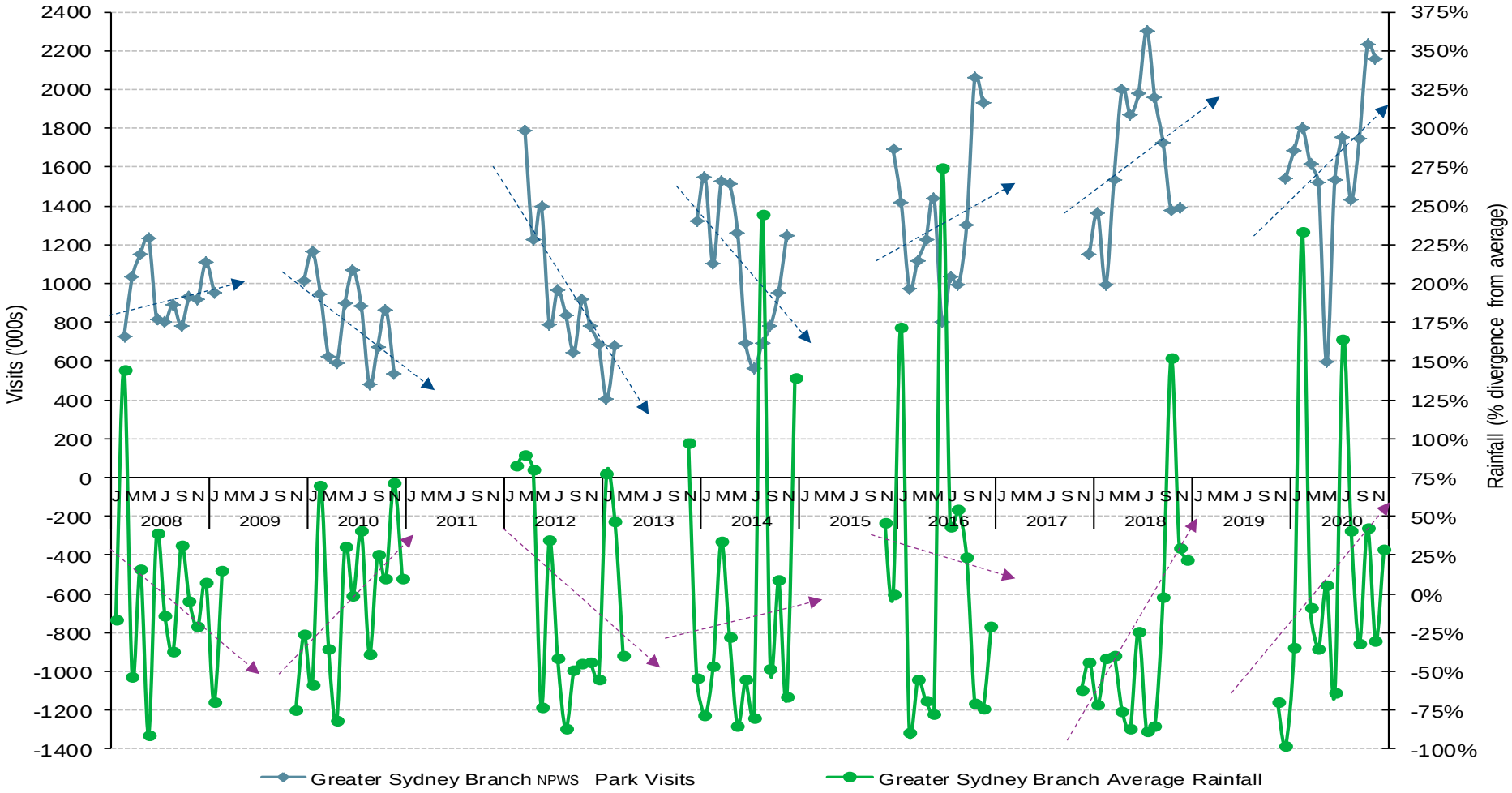
Chart 60: Monthly NPWS Park Visitation versus Monthly Rainfall[29]



Source: Bureau of Meteorology – Climate data online 2008-2020 – Monthly Rainfall = Average of 51 weather stations across NSW.

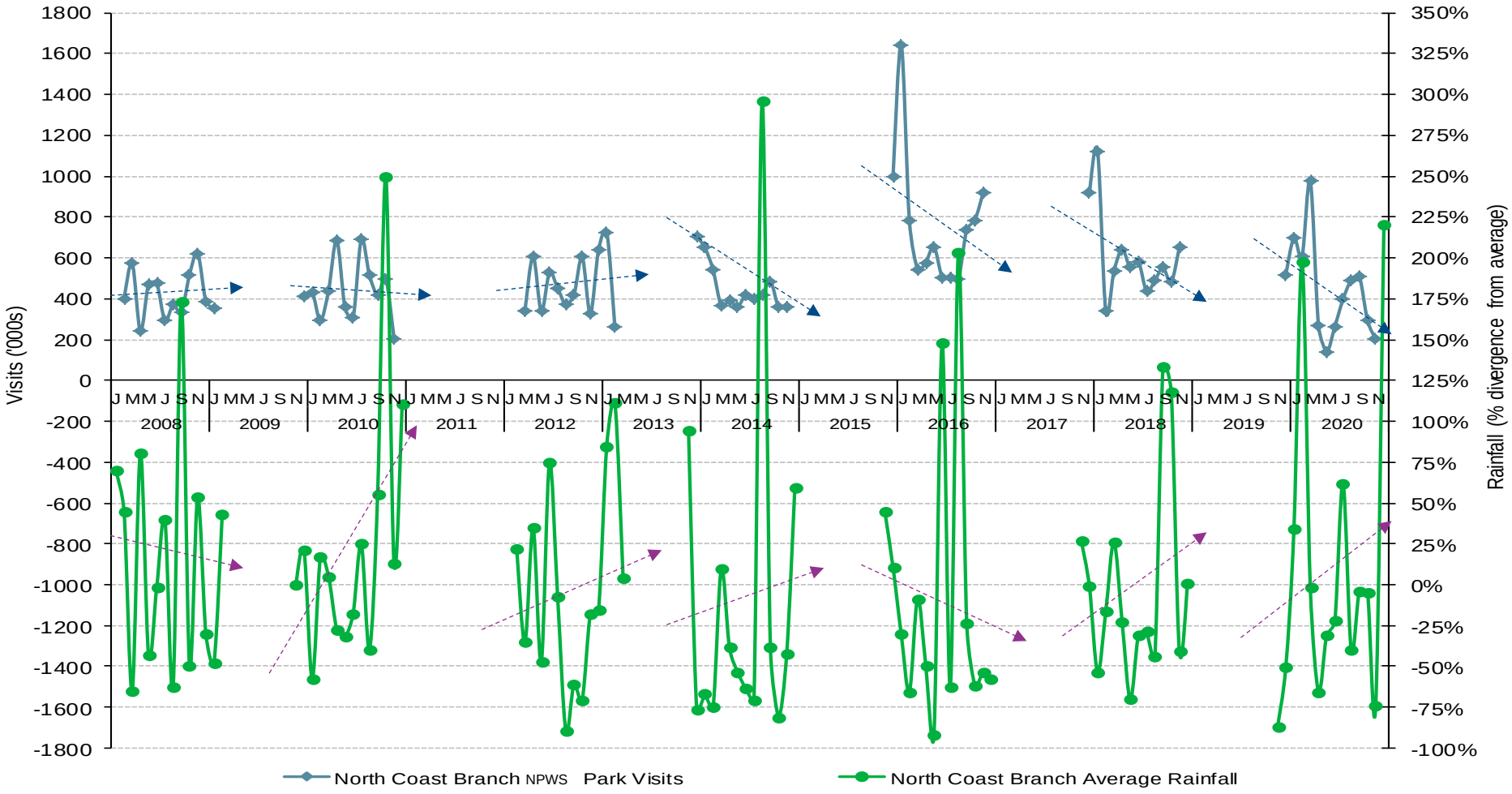
[29] Linear trend lines have been fitted to assist with description of findings for this chart and all following charts.

Chart 61: Monthly NPWS Park Visitation versus Monthly Rainfall - Greater Sydney Branch



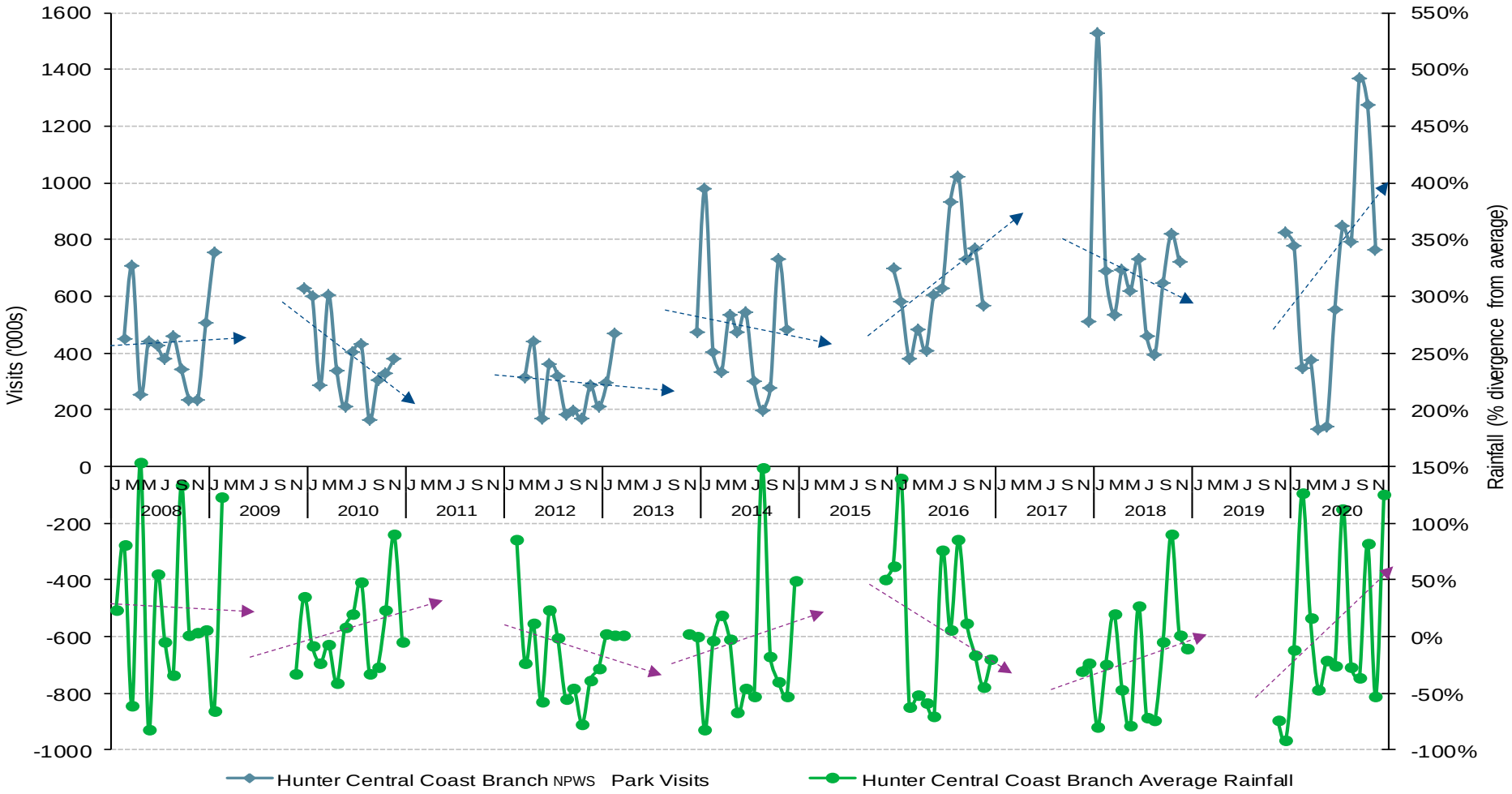
Source: Bureau of Meteorology – Climate data online 2008-2020 – Monthly Rainfall = Average of 5 weather stations across the Great Sydney Branch geographic region.

Chart 62: Monthly NPWS Park Visitation versus Monthly Rainfall - North Coast Branch



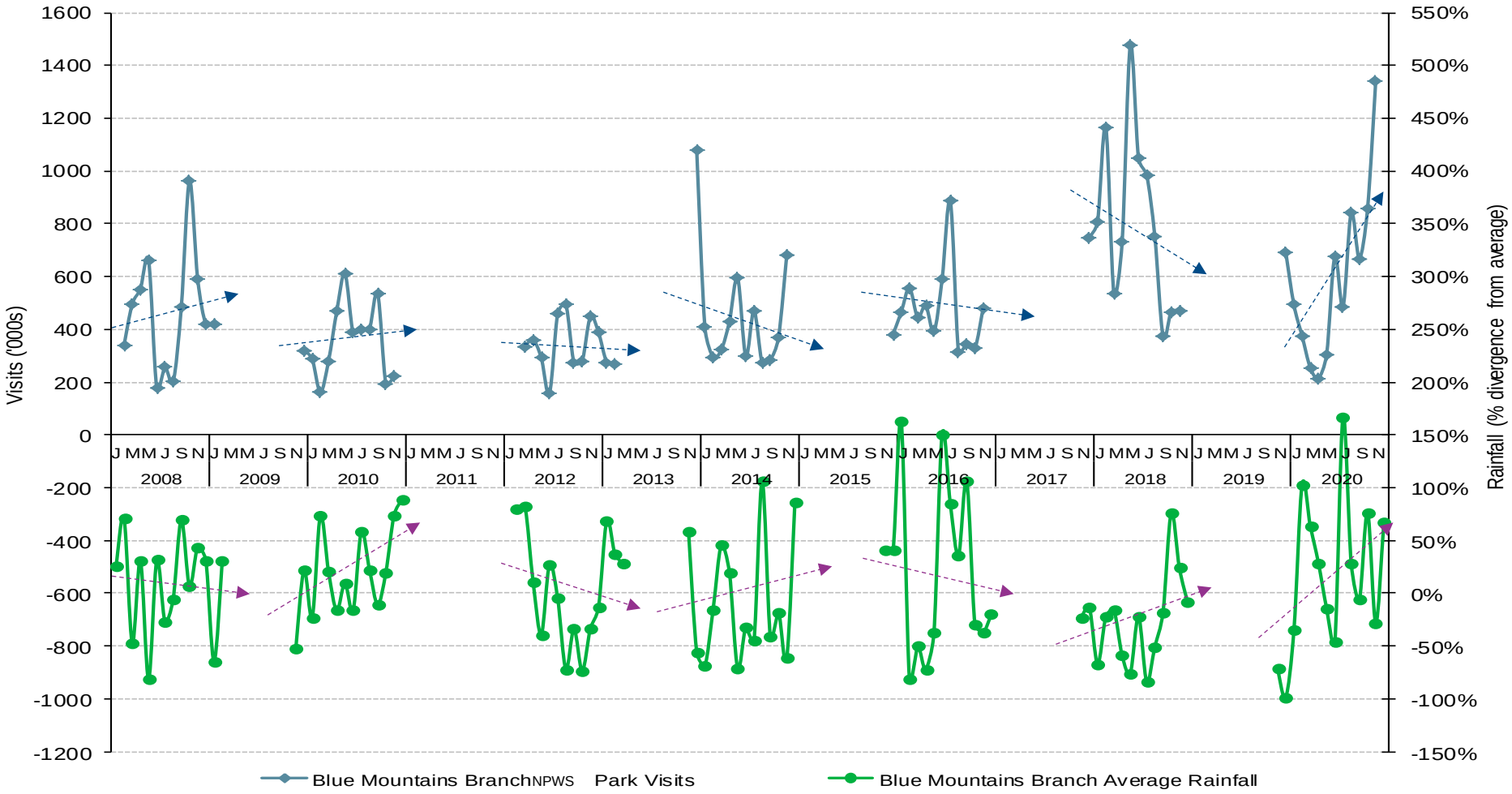
Source: Bureau of Meteorology – Climate data online 2008-2020 – Monthly Rainfall = Average of 8 weather stations across the North Coast Branch geographic region.

Chart 63: Monthly NPWS Park Visitation versus Monthly Rainfall - Hunter Central Coast Branch



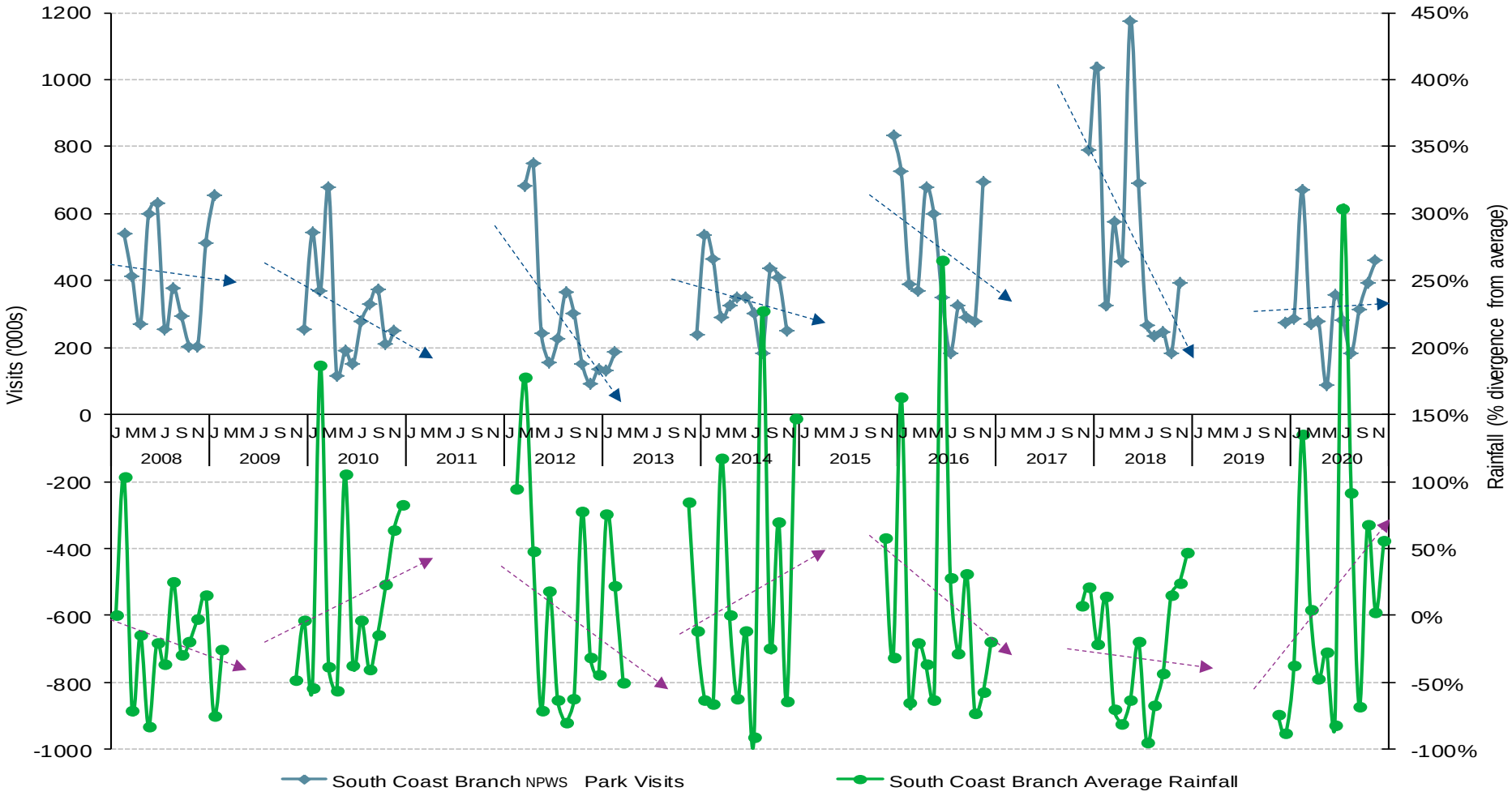
Source: Bureau of Meteorology – Climate data online 2008-2020 – Monthly Rainfall = Average of 8 weather stations across the Hunter Central Coast geographic region.

Chart 64: Monthly NPWS Park Visitation versus Monthly Rainfall - Blue Mountains Branch



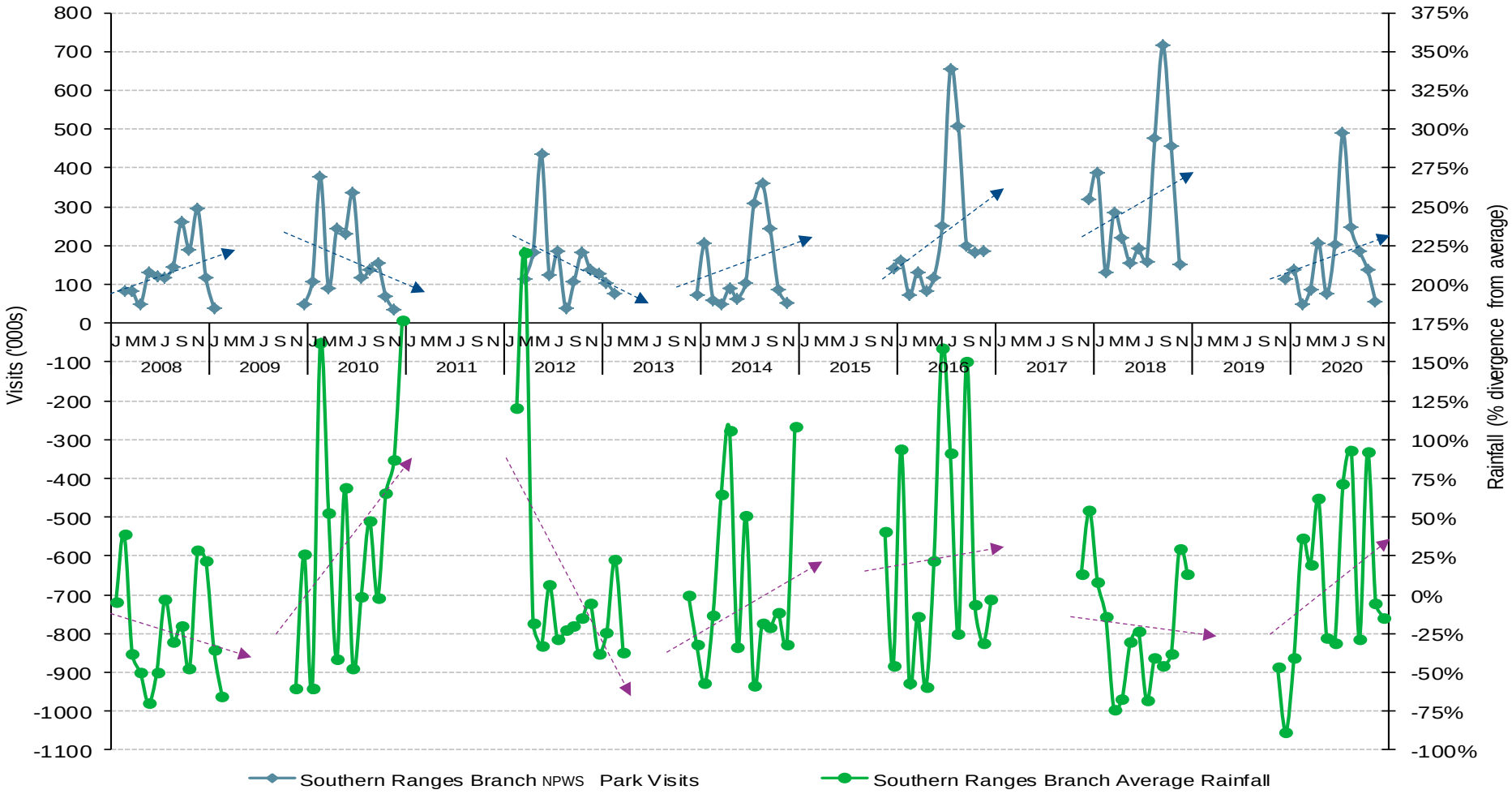
Source: Bureau of Meteorology – Climate data online 2008-2020 – Monthly Rainfall = Average of 6 weather stations across the Blue Mountains Branch geographic region.

Chart 65: Monthly NPWS Park Visitation versus Monthly Rainfall - South Coast Branch



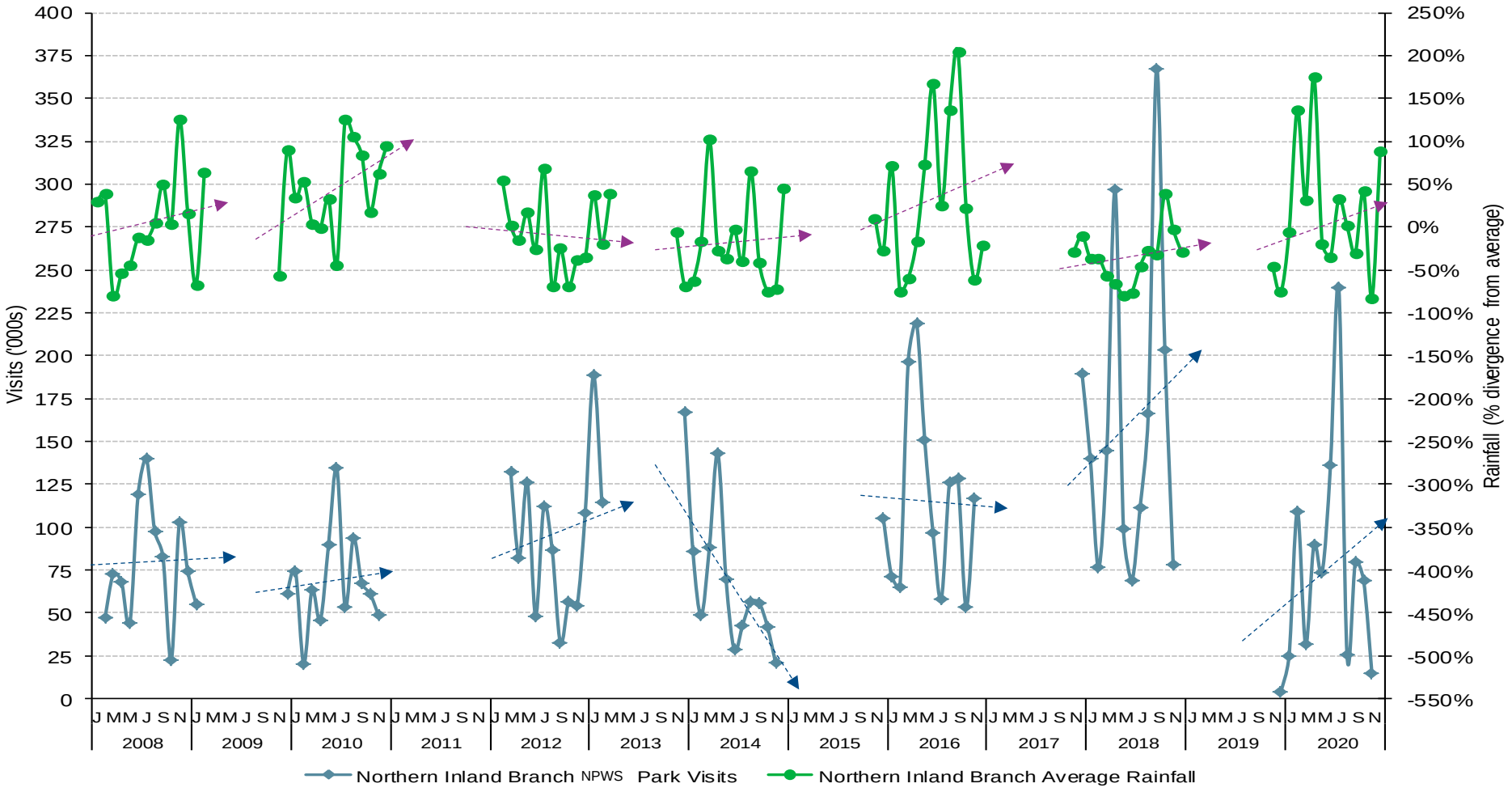
Source: Bureau of Meteorology – Climate data online 2008-2020 – Monthly Rainfall = Average of 7 weather stations across the South Coast Branch geographic region.

Chart 66: Monthly NPWS Park Visitation versus Monthly Rainfall - Southern Ranges Branch



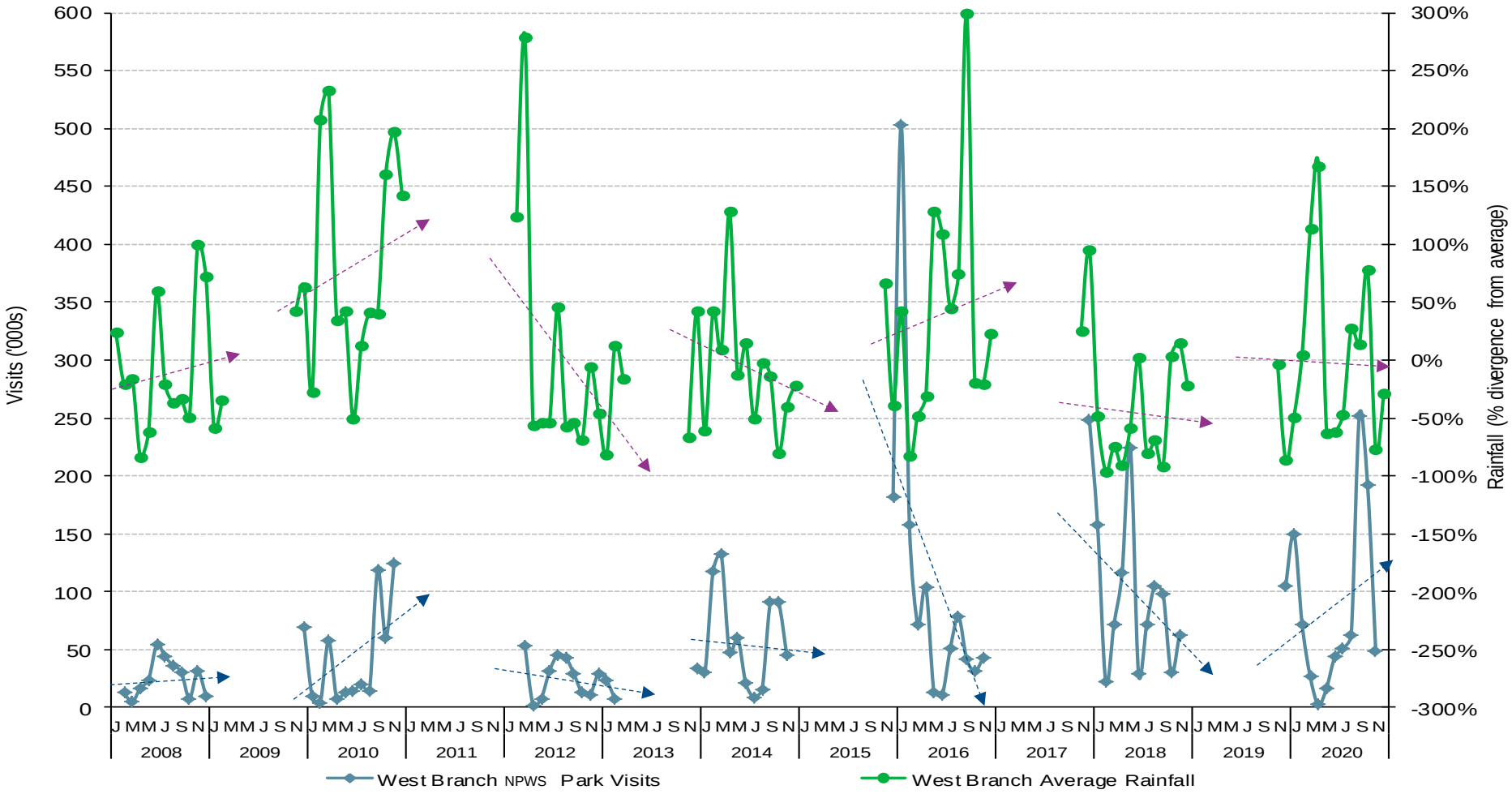
Source: Bureau of Meteorology – Climate data online 2008-2020 – Monthly Rainfall = Average of 6 weather stations across the Southern Ranges Branch geographic region.

Chart 67: Monthly NPWS Park Visitation versus Monthly Rainfall - Northern Inland Branch



Source: Bureau of Meteorology – Climate data online 2008-2020 – Monthly Rainfall = Average of 7 weather stations across the Northern Inland Branch geographic region.

Chart 68: Monthly NPWS Park Visitation versus Monthly Rainfall - West Branch



Source: Bureau of Meteorology – Climate data online 2008-2020 – Monthly Rainfall = Average of 5 weather stations across the West Branch geographic region.

7.5.3 Significant and Sustained Weather Event Effects on NPWS Park Visitation

Table 20 provides a weather summary from the Bureau of Meteorology for each survey year. These brief descriptions of the year match with trend analysis for temperature and rainfall. Warm, dry weather generally results in higher levels of park visitation, while cool, wet weather generally results in lower levels of park visitation.

Table 20: Weather Summary for NSW and Associated NPWS Park Visits

Year	Weather Summary	PWG Annual Park Visitation
2008	Dry year with a drought continuing in southern NSW	High levels of visitation
2010	Third wettest year on record - wettest since 1956	Low levels of visitation
2012	Cool wet start with warm, dry finish	Low visitation until summer 2012-13
2014	Warmest year on record, driest year since 2006	High visitation until winter 2014
2016	Warm in Summer and Autumn and generally warm in Winter and Spring, with high rainfall in June and September	High visitation generally across entire year. Highest visitation in spring
2018	Warmest year on record, 6th driest on record (since 2002)	Highest visitation in summer, autumn and winter
2020	Above average temperatures and rainfall	Highest visitation in spring, lowest in Autumn (COVID-19 lockdown)

Source: Bureau of Meteorology – Climate Summaries for NSW.

Table 21 and Chart 69 show seasonal NPWS park visitation and compare it with seasonal climate summaries for NSW. Key findings are discussed below. Seasons where visitation did not match what would be expected, given temperature, rainfall and specific weather events are highlighted in red in Chart 69.

2010 could have been a worse year for NPWS park visitation based on weather conditions. Similarly, weather conditions in 2012 should have resulted in higher levels of visitation than were achieved. In fact, if it wasn't for the high number of visits in the summer of 2012-13, the 2012 year may have been worse for park visitation than 2010.

When looking at visitation in 2014, generally favourable weather conditions in summer and autumn boosted visits in these seasons. However, favourable weather conditions also prevailed in winter and spring, yet visitation in both these seasons could have been higher. Therefore 2014 annual park visitation could have been even higher if visitation in winter and spring was at levels expected.

Apart from three wet months (January, June and September) the 2016 year was warm, even in winter. This provided ideal conditions for NPWS park visitation. As a result, visitation in 2016 was high, with the highest visitation levels recorded in spring of 2016.

In 2018, favourable weather conditions for the majority of NSW in the summer, autumn and winter (warm and dry) resulted in the highest levels of NPWS park visitation recorded. Rain in spring in Sydney and in the areas surrounding Sydney (i.e. the Illawarra and Hunter Central Coast) had some detrimental impact on visitation, as this would have dissuaded visitors typically going to the most frequently visited in parks in NSW from visiting. However, for most of spring and for the remainder of the state, weather conditions were warm, resulting in the second highest number of spring visits recorded.

For 2020, moderate levels of visitation were evident in summer and unlikely to be impacted by weather. Visitation levels were more likely to have been impacted by bushfires in all NPWS Branches except the Greater Sydney and West Branches. While the 2020 autumn was cool and wet, generally reducing park visitation, COVID-19 restrictions had a far greater impact, as residents could not leave their houses to visit parks. Winter 2020 started with favourable weather conditions (warm and dry). These conditions coupled with the easing of COVID-19 restrictions had a substantially positive impact on park visitation. A warm spring which became hotter approaching summer also generated favourable conditions for park visitation.

Table 21: Seasonal Weather Summary NSW and Associated NPWS Park Visits

Season	Weather Summary	Visitation	Comment
Autumn 2008	Dry, below average rainfall	High	Favourable conditions for high visits
Winter 2008	Average winter	Moderate	Conditions typical for moderate visitation
Spring 2008	Warm, but with above average rainfall	High	Mostly favourable conditions for high visits
Summer 2008-09	Above average temperatures	Moderate	Higher summer temperatures may have kept visits down
Summer 2009-10	Wet, warm, cyclones causing high rainfall	Moderate	Visitation higher than expected for conditions
Autumn 2010	Wet, above average temeratures, some flooding	Low	Mostly unfavourable consitions - low visits expected
Winter 2010	Cold, wet winter	Moderate-Low	Unfavourable conditions - visits slightly higher than expected
Spring 2010	Wettest spring on record, cool	Low	Unfavourable conditions - low visits expected
Autumn 2012	Wettest week in March, cold, but dry autumn	Low -Moderate	Visits expected to be low in March (and were) - remainder similar to autumn 2010
Winter 2012	Dry, clear winter - warm days, cool nights	Low	Favourable conditions - visits should have been much higher
Spring 2012	Warm, dry spring	Low	Favourable conditions - visits should have been much higher
Summer 2012-13	Warm summer - flooding in the north of NSW in late January	High	Mostly favourable conditions to mid summer - high visits until mid-summer
Summer 2013-14	Driest summer since 1984-5, 5th warmest	High	High visits in early summer, but declined with increasing temperatures late summer
Autumn 2014	Wet & cloudy March, but dier & warmer from mid-April with record warm spell in May	High	Generally favourable conditions for high visits
Winter 2014	Average winter	Moderate-Low	Favourable conditions - visits should have been higher
Spring 2014	Warmest spring on record	Moderate-High	Favourable conditions - but visits could have been slightly higher over the period
Summer 2015-16	Stormy summer, but dry for the most part	High	Generally favourable conditions for high visits
Autumn 2016	Warmest autumn on record	High	Favourable conditions for high visits
Winter 2016	Mild winter, with warmest nights on record, but third wettest on record	Moderate-High	Unfavourable for June visits, but favourable for high visits in July and August
Spring 2016	Cool, wet September, but dry October and November. Warm on coast, but cool inland	Moderate-High	Unfavourable for September visits, but favourable for high visits in October and November
Summer 2017-18	Warmer than average summer, dry across the north, but wet in the south	High	Generally favourable conditions for high visits
Autumn 2018	Warmer and drier autumn than average	High	Extremely favourable conditions for high visits
Winter 2018	Very dry winter with warm days and cool nights	High	Favourable conditions for high visits
Spring 2018	Warm spring, some rain in Greater Sydney, Illawarra and Hunter Central Coast	Moderate-High	Generally favourable conditions for high visits, but rain around Sydney negatively impacts on the most visited parks

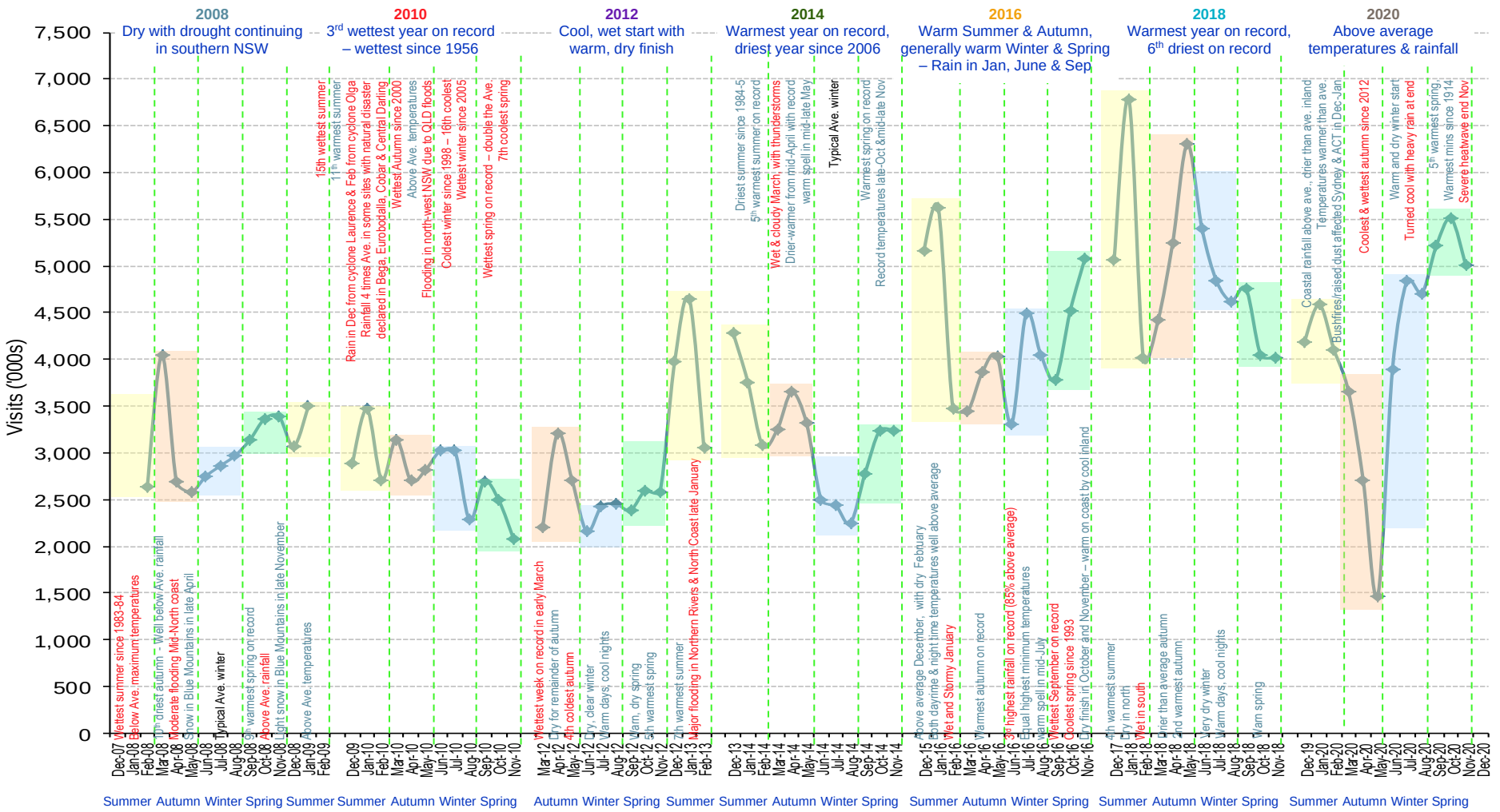
Source: Bureau of Meteorology – Seasonal Climate Summaries for NSW.

Table 21: Seasonal Weather Summary NSW and Associated NPWS Park Visits (cont.)

Season	Weather Summary	Visitation	Comment
Summer 2019-20	Coastal rainfall above average, drier than average inland. Temperatures were warmer than average. Bushfires/raised dust affected Sydney and the ACT in Dec-Jan	Moderate	Rainfall not favourable for high visits, but temperatures favourable. Bushfires impacted on visits due to park closures
Autumn 2020	Coolest and wettest since 2012	Lowest	Conditions less favourable for visits and visitation affected by COVID-19 lockdown
Winter 2020	Warm and dry start turning cool with heavy rain.	Moderate-High	Conditions favourable early, leading to high visitation, but weather impacted later in the season
Spring 2020	5th warmest spring, warmest minimums since 1914. Severe heatwave conditions at end of Nov	High	Generally favourable conditions for high visits

Source: Bureau of Meteorology – Seasonal Climate Summaries for NSW.

Chart 69: Monthly NPWS Park Visitation with Associated Weather Events



Source: Bureau of Meteorology - Annual and Quarterly weather summaries

8. Other Survey Results

Please note that results highlighted in blue (higher) or red or orange (lower) compared in the remainder of this report are statistically significant compared with other years.

8.1 Unweighted (Sample) Data versus Weighted (Population) Data

Survey data was weighted by age by sex by region to reflect the actual population for each region. As over-sampling was conducted in the ACT and Remainder South East QLD, their contribution was weighted downward to reflect their actual population contribution (yellow highlight in Table 22). Low population regions were over-sampled to ensure sufficient numbers of park visitors were surveyed in these regions. Conversely, Sydney and Melbourne respondents were weighted upward to match the actual population these regions contribute (green highlight).

Table 22: Age and Sex by Region—All Respondents 2020

Age by Sex by Region	Total Pop'n	Male 18-24	Male 25-34	Male 35-49	Male 50+	Female 18-24	Female 25-34	Female 35-49	Female 50+
	n= 15,644	n= 894	n= 1,409	n= 2,009	n= 3,314	n= 767	n= 1,417	n= 2,133	n= 3,701
Sydney									
uc	3,256	190	344	437	644	149	358	420	714
uc%	21%	22%	23%	22%	19%	21%	24%	20%	19%
wc%	28%	29%	31%	29%	25%	28%	30%	29%	26%
Remainder NSW									
uc	2,610	102	188	292	689	115	185	310	729
uc%	17%	12%	12%	15%	21%	16%	12%	15%	20%
wc%	14%	12%	11%	13%	18%	12%	11%	13%	18%
ACT									
uc	1,955	121	215	268	330	84	196	318	423
uc%	13%	14%	14%	13%	10%	12%	13%	15%	12%
wc%	2%	2%	2%	2%	2%	2%	2%	2%	2%
Melbourne									
uc	2,604	156	280	337	501	149	288	344	549
uc%	17%	18%	18%	17%	15%	21%	19%	17%	15%
wc%	27%	29%	30%	28%	24%	28%	30%	28%	24%
Remainder VIC									
uc	1,302	57	91	158	335	50	91	158	362
uc%	8%	7%	6%	8%	10%	7%	6%	8%	10%
wc%	8%	7%	6%	7%	10%	8%	6%	7%	9%
Brisbane									
uc	1,957	128	199	258	397	87	188	281	419
uc%	13%	15%	13%	13%	12%	12%	12%	14%	11%
wc%	13%	14%	13%	13%	12%	14%	13%	14%	12%
Remainder Southern & Southeast QLD									
uc	1,954	91	203	258	421	82	181	237	481
uc%	12%	11%	13%	13%	13%	11%	12%	11%	13%
wc%	8%	7%	6%	7%	9%	7%	7%	8%	9%

uc: Unweighted count (i.e. the number surveyed or asked a given question): uc%: Unweighted count percentage (percentage of the total sample the unweighted count represents in each column); wc%: Weighted percentage (the proportion of the total 18yrs+ population of the seven survey regions that call represents in each column). Source: NPWS Parks Visitor Surveys 2020;
Base: n=15,638

As the sampling frame in 2012 changed from being based on the Electronic White Pages to Random Digit Dialling of both landline and mobile numbers, data was also weighted to reflect the telephone status of respondents. In 2012 and 2014, 22%-23% of calls were made to mobile numbers. In an effort to increase the representability of mobile only households in the sample 53% percent of respondents were called on mobile numbers in 2016, 40% in 2018 and 60% in 2020.

Table 23 shows that people from mobile only households in 2020 represent 57% the population and 39% of the unweighted survey sample in 2020. This represents a stark increase from 2012 and 2014 levels (7% and 9% respectively) and even from 2016 to 2018 (22% and 29% respectively). Therefore, respondents from mobile only households were given smaller weights in 2020 than from 2012 to 2017 in order to reflect their population contribution. This means that the sample was more representative by phone status in 2020 than from 2012 to 2014. Mobile only households were better represented in 2016 and 2018 than in 2020 because of the marked increase in the proportion of mobile only households in the Australian population from 2016-2018 to 2020. To obtain a similar level of representativeness in 2020 80% of calls would have needed to be to mobile phone numbers. We recommend discussing the proportion of mobile numbers that need to be contacted for the 2022 survey.

People from households with both mobiles and landlines were weighted down, as they were over-represented in the sample (57% in the sample c.f. 40% in the population in 2020). Note that higher weights for mobile only households in the ACT and Queensland were employed, because fewer mobile calls were made to these regions (even though they were over-sampled).

Landline only households are now becoming increasingly small in both the sample frame and the Australian population in 2020 (4% and 3% respectively from 8% and 9% respectively in 2012). In essence, landline numbers are called to (a) attempt to obtain respondents from the small proportion of landline only households in Australia; and (b) to meet interview quotas in low population regions (e.g. ACT, remainder Victoria and remainder Southern Queensland), as mobile numbers cannot be regionalised for sample selection. While this practice may not need to continue for point (a) above, as the proportion of landline only households becomes significantly smaller with time, it is likely to still be required for point (b) above to ensure that interviewing quotas are met for low population regions. However, the proportion of landline numbers called could be reviewed with consideration given to an 80%:20% mobile to landline number ratio in 2022. Alternatively, consideration could be given to using a 100% mobile sample, with 80% of the frame generated from RDD mobile numbers and 20% of the fame generated from regionalised mobile numbers (i.e. either listed mobile numbers with a geographic indicator for from telephone sample providers who have identified the geographic location of the number. We recommend discussing the potential of using a mixture or RDD mobile numbers and regionalised mobile numbers for the 2022 survey.

Table 23: Phone Status by Region—All Respondents 2012-2020

Phone Status by Region	Mobiles & Landlines in the Household					Mobiles Only in the Household					Landlines Only in the Household				
	2012 n= 13,282	2014 n= 13,120	2016 n= 11,600	2018 n= 10,572	2020 n= 8,920	2012 n= 1,041	2014 n= 1,451	2016 n= 3,500	2018 n= 4,593	2020 n= 6,085	2012 n= 1323	2014 n= 1,085	2016 n= 583	2018 n= 479	2020 n= 633
uh%	85%	84%	74%	68%	57%	7%	9%	22%	29%	39%	8%	7%	4%	3%	4%
w h%	74%	69%	70%	64%	40%	18%	24%	26%	33%	57%	9%	7%	4%	3%	3%
Sydney															
uc	2,756	2,724	2,358	2,450	1,765	275	350	822	943	1,396	227	175	79	68	95
uh%	85%	84%	72%	69%	54%	8%	11%	25%	59%	43%	7%	5%	2%	2%	3%
w h%	74%	71%	71%	67%	44%	19%	23%	26%	30%	54%	8%	7%	3%	3%	2%
Remainder NSW															
uc	2,176	2,140	1,906	1,723	1,527	177	229	582	765	977	262	240	120	124	106
uh%	83%	82%	73%	66%	59%	7%	9%	22%	29%	37%	10%	9%	5%	5%	4%
w h%	71%	66%	69%	65%	44%	17%	24%	26%	29%	52%	12%	10%	6%	7%	4%
ACT															
uc	1,767	1,804	1,655	1,553	1,320	34	47	222	323	543	155	117	83	75	92
uh%	90%	92%	84%	80%	68%	2%	2%	11%	17%	28%	8%	6%	4%	4%	5%
w h%	78%	78%	64%	62%	43%	15%	16%	33%	37%	55%	8%	6%	2%	1%	2%
Melbourne															
uc	2,161	2,131	1,810	1,597	1,335	259	335	757	990	1,181	184	141	45	22	88
uh%	83%	82%	69%	61%	51%	10%	13%	29%	38%	45%	7%	5%	2%	1%	3%
w h%	75%	71%	72%	69%	36%	18%	24%	25%	29%	61%	7%	5%	3%	2%	2%
Remainder VIC															
uc	1,085	1,022	956	831	796	89	189	308	445	425	129	96	43	29	81
uh%	83%	78%	73%	64%	61%	7%	14%	24%	34%	33%	10%	7%	3%	2%	6%
w h%	74%	67%	72%	58%	39%	16%	25%	22%	38%	58%	11%	8%	5%	4%	3%
Brisbane															
uc	1,614	1,524	1,420	1,390	1,058	121	161	463	465	816	140	130	94	104	83
uh%	86%	84%	72%	41%	54%	6%	9%	23%	24%	42%	7%	7%	5%	5%	4%
w h%	72%	66%	66%	55%	38%	21%	28%	30%	42%	59%	7%	6%	4%	3%	3%
Remainder Southern QLD															
uc	1,723	1,775	1,495	1,233	1,119	86	140	346	662	747	226	186	119	57	88
uh%	85%	84%	76%	63%	57%	4%	7%	18%	34%	38%	11%	9%	6%	3%	5%
w h%	76%	67%	69%	56%	36%	16%	26%	28%	40%	60%	8%	7%	4%	4%	3%

uc: Unweighted count (i.e. the number surveyed or asked a given question): uh%: Unweighted count percentage (percentage of the total sample the unweighted count represents in each row); wh%: Weighted percentage (the proportion of the total 18yrs+ population of the seven survey regions that call represents in each row).
Source: NPWS Parks Visitor Surveys 2008 - 2018
Base: 2008 n=15,715; 2010 n=15,643; 2012 n=15,646; 2014 n=15,656; 2016 n=15,683, 2018 n=15,644; 2020 n= 15,638

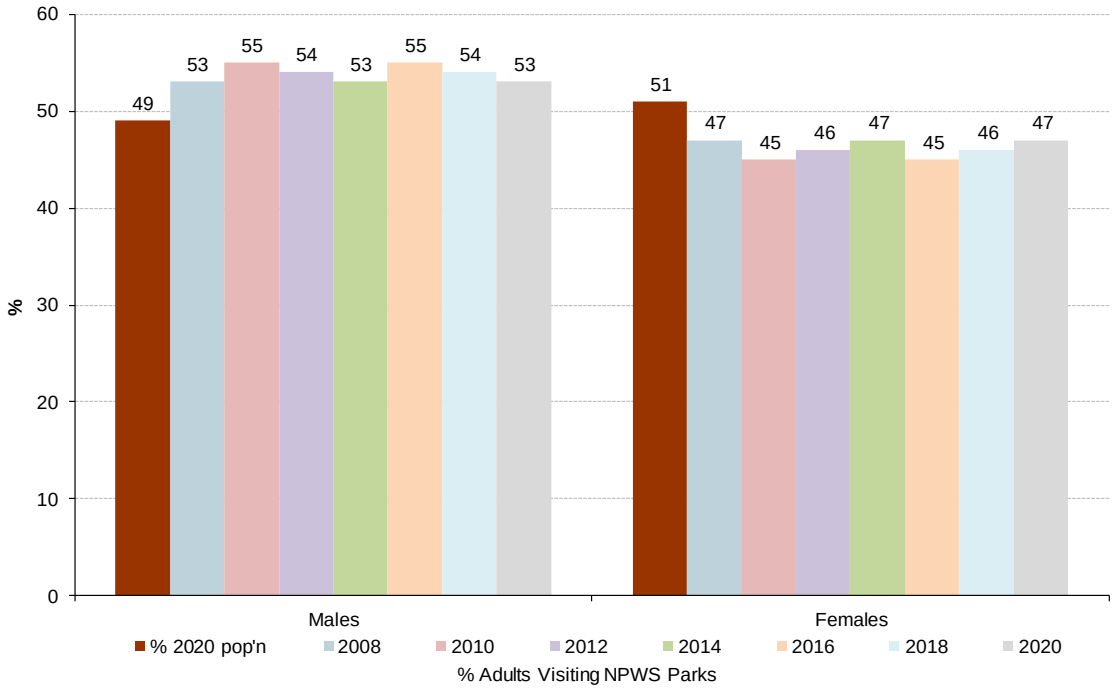
8.2 Park Visitation by Selected Demographics

The following charts compare the actual population percentage of the overall survey region, with the percentage of visitors and visits to *any NPWS-managed* park by survey year. Compared with the population, NPWS park visitors are more likely to be male (Chart 70).

Visitation to NPWS parks has been slightly more over-represented by males than are represented amongst visitors (Chart 71), but this appears to diminishing over time. Visitation by males decreased from 59% in 2016 to 53% in 2018 to 50% in 2020 (and females increased from 41% to

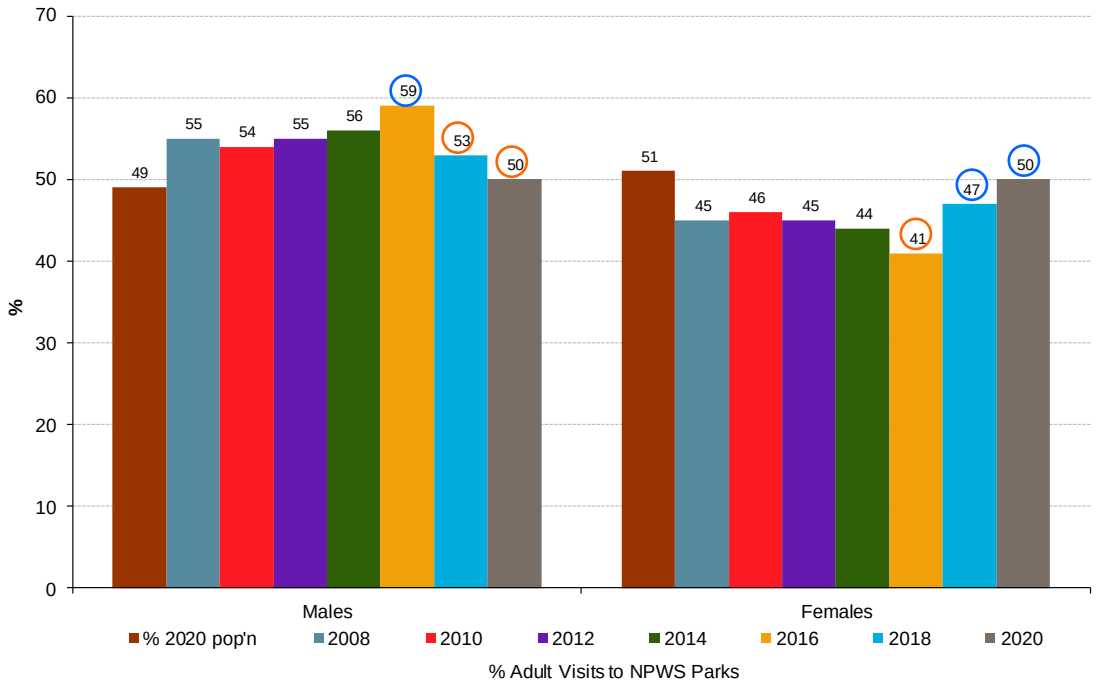
47% and 50% respectively). This decrease in the proportion of male visits to NPWS parks from 2016 to 2018 and 2020 was statistically significant.

Chart 70: Visitors to NPWS Parks by Sex



Source: NPWS Parks Visitor Surveys 2008 – 2020
Base: 2008 n=1,563; 2010 n=1,389; 2012 n=1,421; 2014 n=1,651; 2016 n=1,708, 2018 n=1,718; 2020 n= 1,178

Chart 71: Visitation to NPWS Parks by Sex

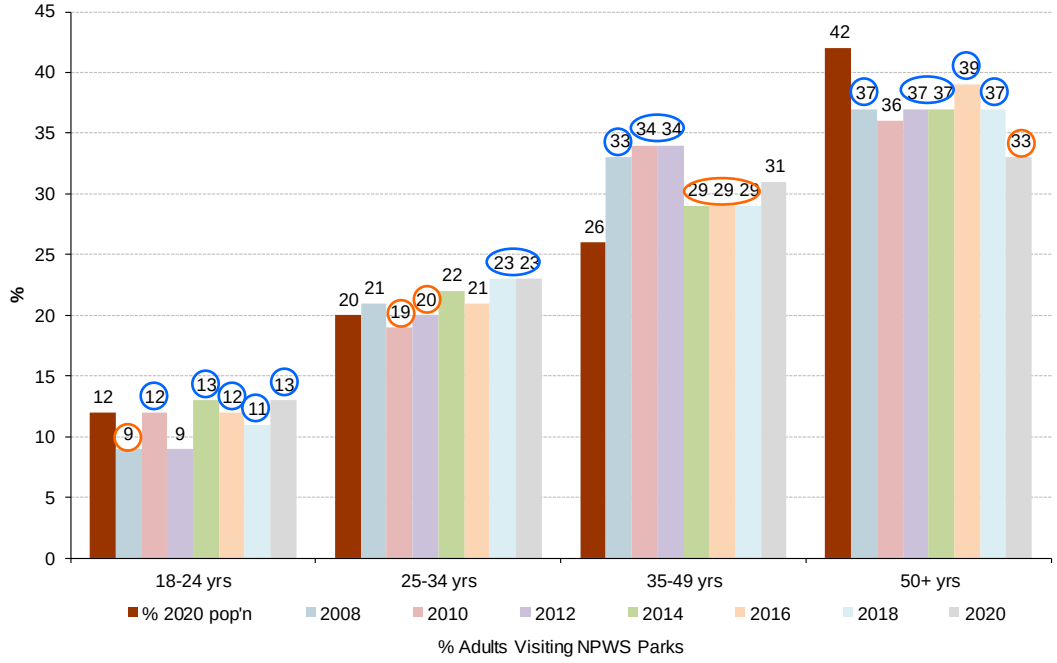


Source: NPWS Parks Visitor Surveys 2008 – 2020
Base: 2008 n=1,563; 2010 n=1,389; 2012 n=1,421; 2014 n=1,651; 2016 n=1,708, 2018 n=1,718; 2020 n= 1,178

Significantly lower
Significantly higher

A slightly younger age profile is evident from 2014 to 2020 compared with other years in terms of visitors to NPWS parks, with the proportion of visitors aged 50 years and over years significantly lower in 2020 than in most other years (Chart 72). This trend was not observed in Roy Morgan Holiday Tracking Survey (HTS data). In general, visits by age are relatively stable over time. The proportion of visits made by 18-24 year olds in 2010 and 2014 to 2020 are significantly higher than in 2008 (Chart 73).

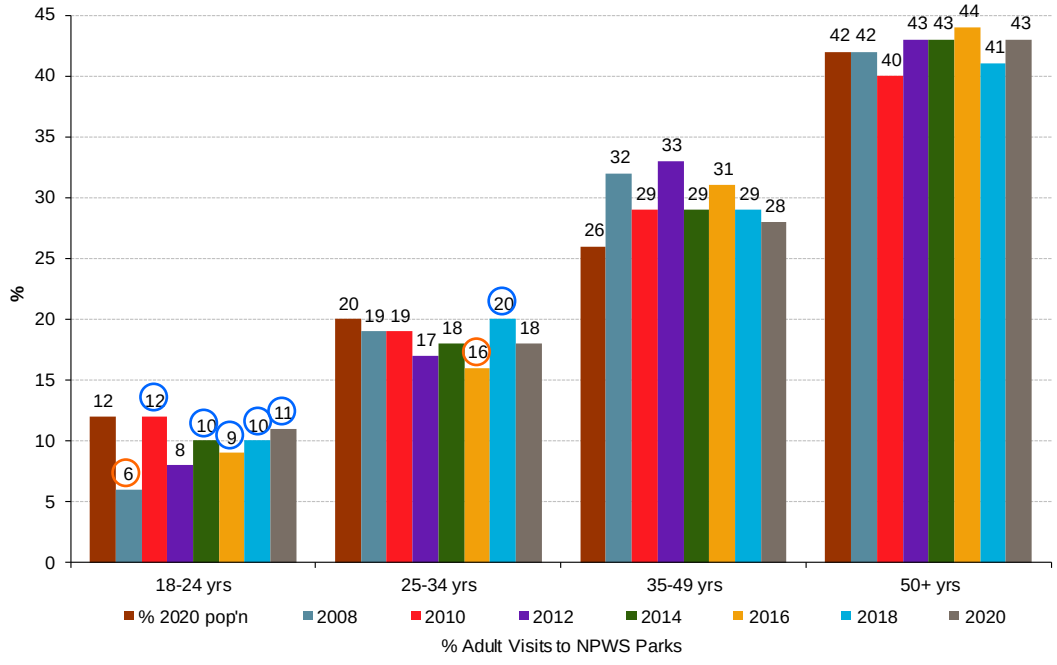
Chart 72: Visitors to NPWS Parks by Age



Source: NPWS Parks Visitor Surveys 2008 – 2020
Base: 2008 n=1,563; 2010 n=1,389; 2012 n=1,421; 2014 n=1,651; 2016 n=1,708, 2018 n=1,718; 2020 n=1,178

Significantly lower
Significantly higher

Chart 73: Visitation to NPWS Parks by Age

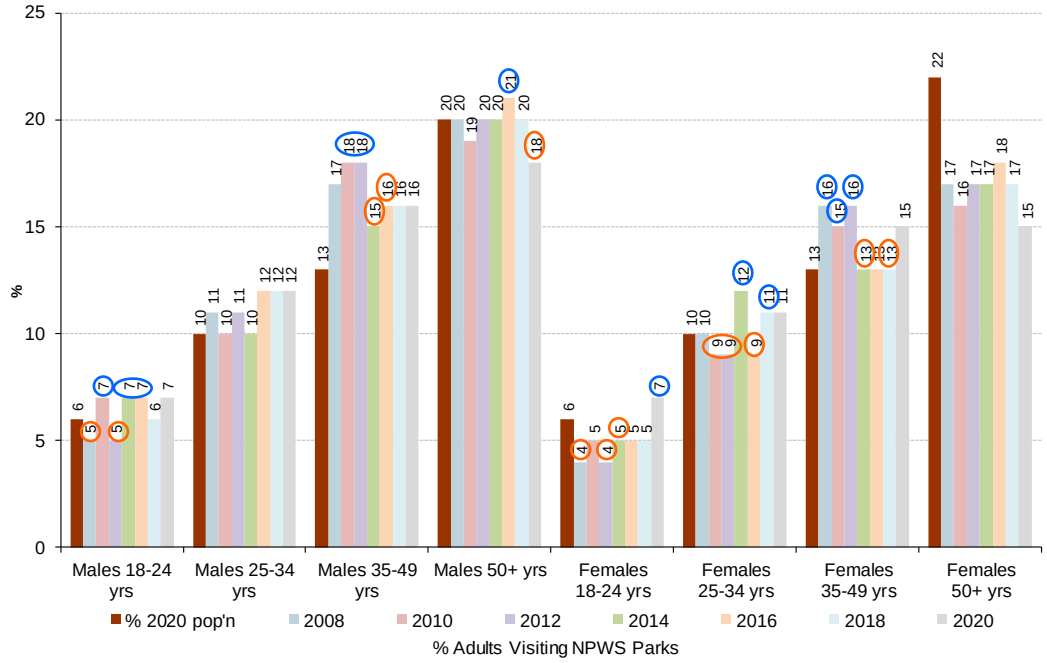


Source: NPWS Parks Visitor Surveys 2008 – 2020
Base: 2008 n=1,563; 2010 n=1,389; 2012 n=1,421; 2014 n=1,651; 2016 n=1,708, 2018 n=1,718; 2020 n= 1,178

Significantly lower
Significantly higher

The slightly younger age profile of visitors in 2014 to 2020 cannot be explained by any consistent change in the proportion of males or females in the younger age groups across years (Chart 74). The proportion of visits from males aged 18-34 years is virtually the same as for visits from females aged 18-34 years in 2020 (15% and 14%), as are visits from males and females aged 35 years and over in 2020 (35% and 36% respectively) (see Chart 75).

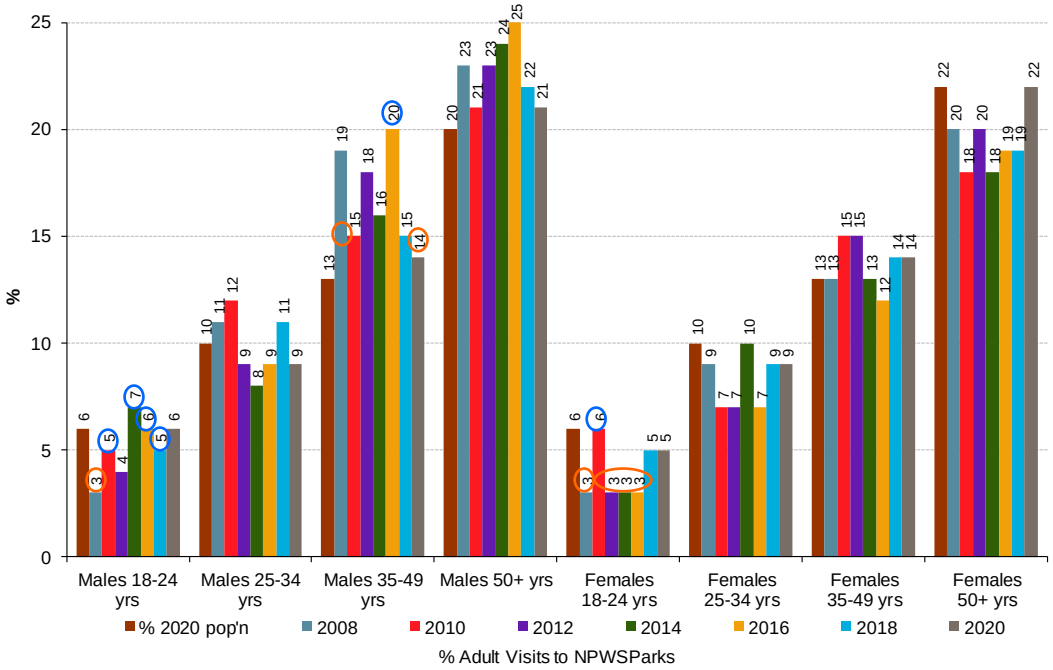
Chart 74: Visitors to NPWS Parks by Age by Sex



Source: NPWS Parks Visitor Surveys 2008 – 2020
Base: 2008 n=1,563; 2010 n=1,389; 2012 n=1,421; 2014 n=1,651; 2016 n=1,708, 2018 n=1,718; 2020 n= 1,178

Significantly lower than 2020 estimate
Significantly higher than 2020 estimate

Chart 75: Visitation to NPWS Parks by Age by Sex

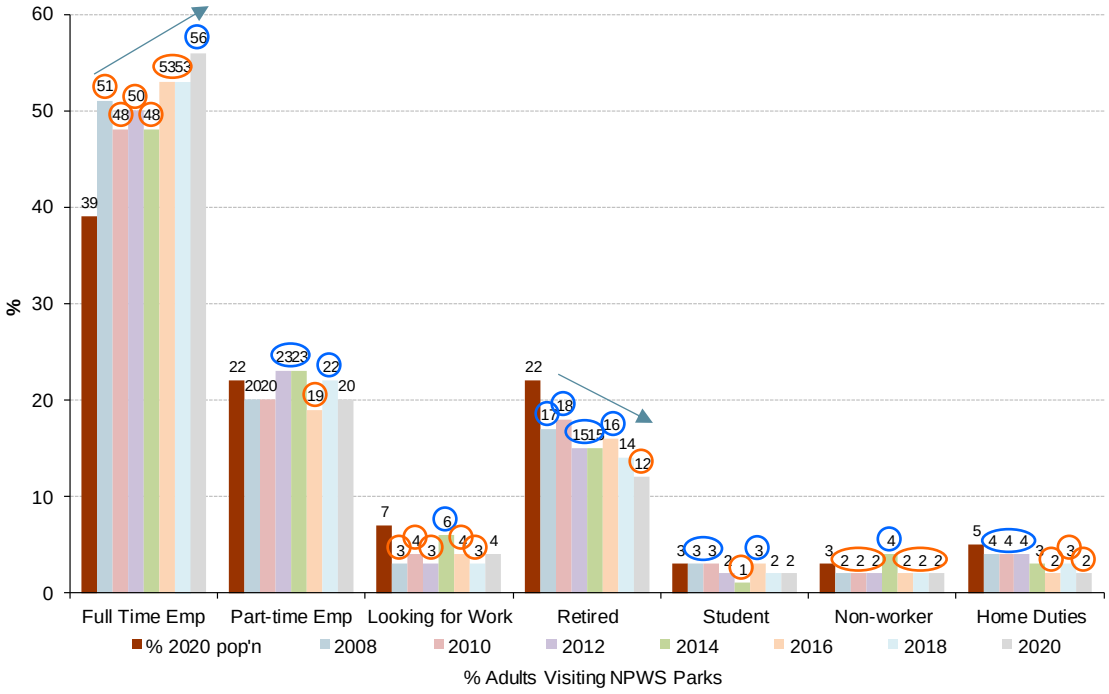


Source: NPWS Parks Visitor Surveys 2008 – 2020
Base: 2008 n=1,563; 2010 n=1,389; 2012 n=1,421; 2014 n=1,651; 2016 n=1,708, 2018 n=1,718; 2020 n=1,178

Significantly lower
Significantly higher

In 2020 the proportion of NPWS park visitors employed in work increased to its highest proportion recorded (76%). This was the result of a significant increase in the proportion of visitors in full time work (56% - Chart 76). The proportion of retired visitors significantly declined in 2020 (12%).

Chart 76: Visitors to NPWS Parks by Work Status

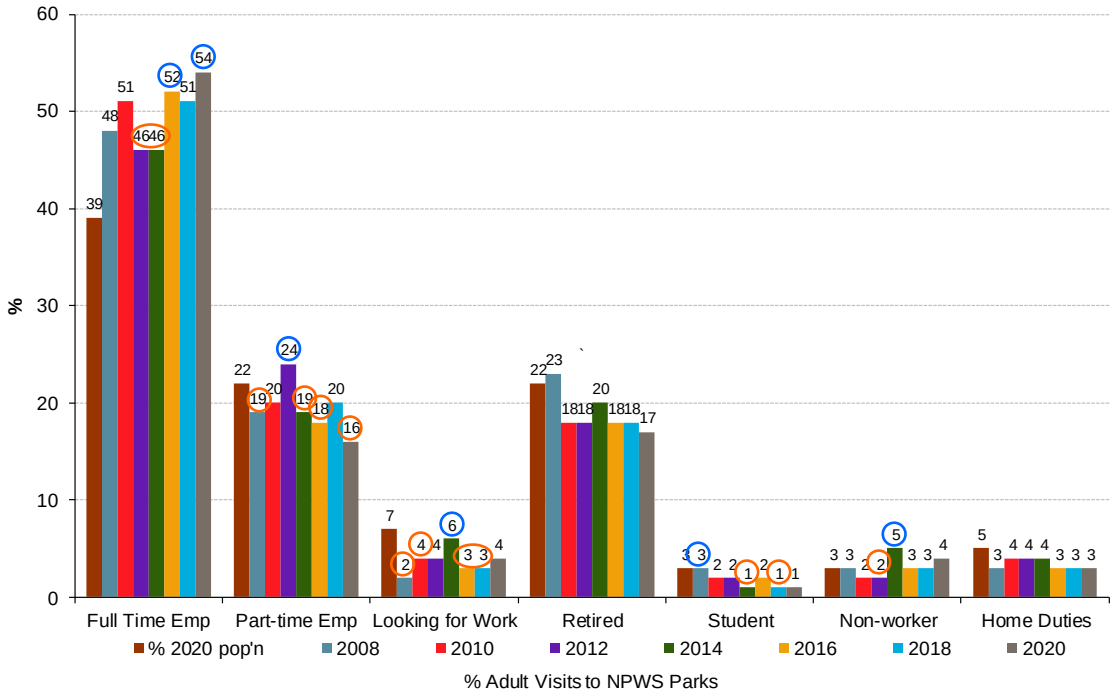


Source: NPWS Parks Visitor Surveys 2008 – 2020
Base: 2008 n=1,563; 2010 n=1,389; 2012 n=1,421; 2014 n=1,651; 2016 n=1,708, 2018 n=1,718; 2020 n=1,178

Significantly lower
Significantly higher

This increase in employed visitors in 2020 did not result in an increase in the proportion of their visits (down from 71% in 2018 to 70% in 2020). While the proportion of visits from those in full time employment increased to 54% in 2020, this was offset by a significant decline in visits from part-time workers (down from 20% in 2018 to 16% in 2020 – see Chart 77), which may have been a result of COVID-19 restrictions .

Chart 77: Visitation to NPWS Parks by Work Status

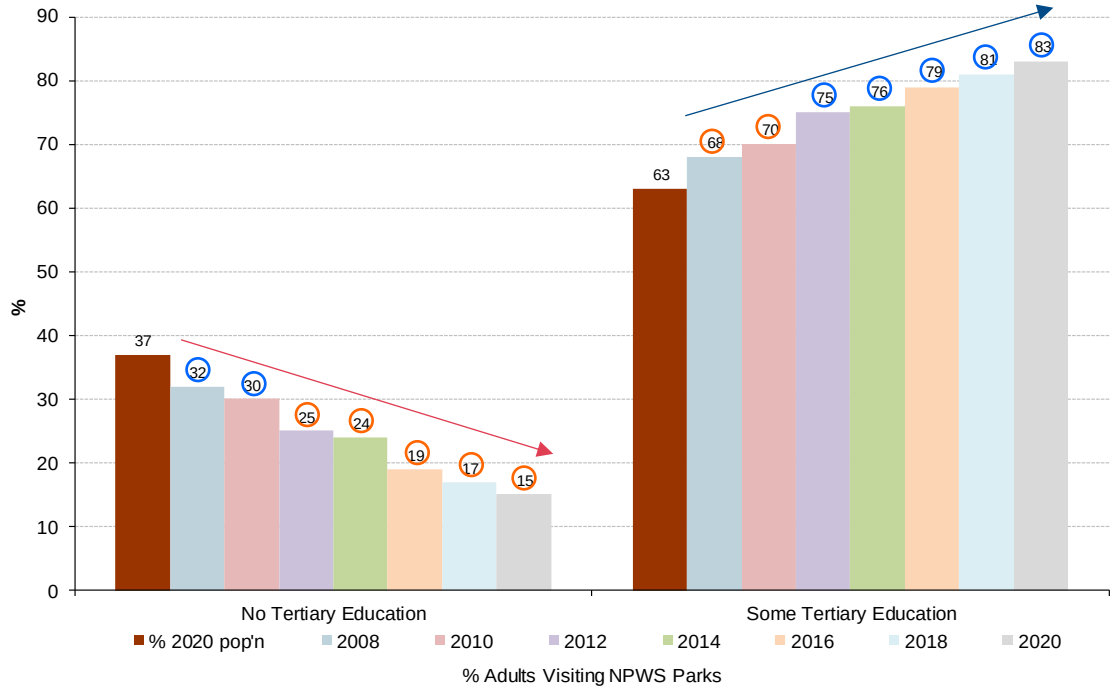


Source: NPWS Parks Visitor Surveys 2008 – 2020
Base: 2008 n=1,563; 2010 n=1,389; 2012 n=1,421; 2014 n=1,651; 2016 n=1,708, 2018 n=1,718; 2020 n= 1,178

Significantly lower
Significantly higher

The proportion of people without any form of tertiary education who visit NPWS parks is declining over time. The opposite trend is evident amongst people with some form of tertiary education (Chart 78).

Chart 78: Visitors to NPWS Parks by Education Summary

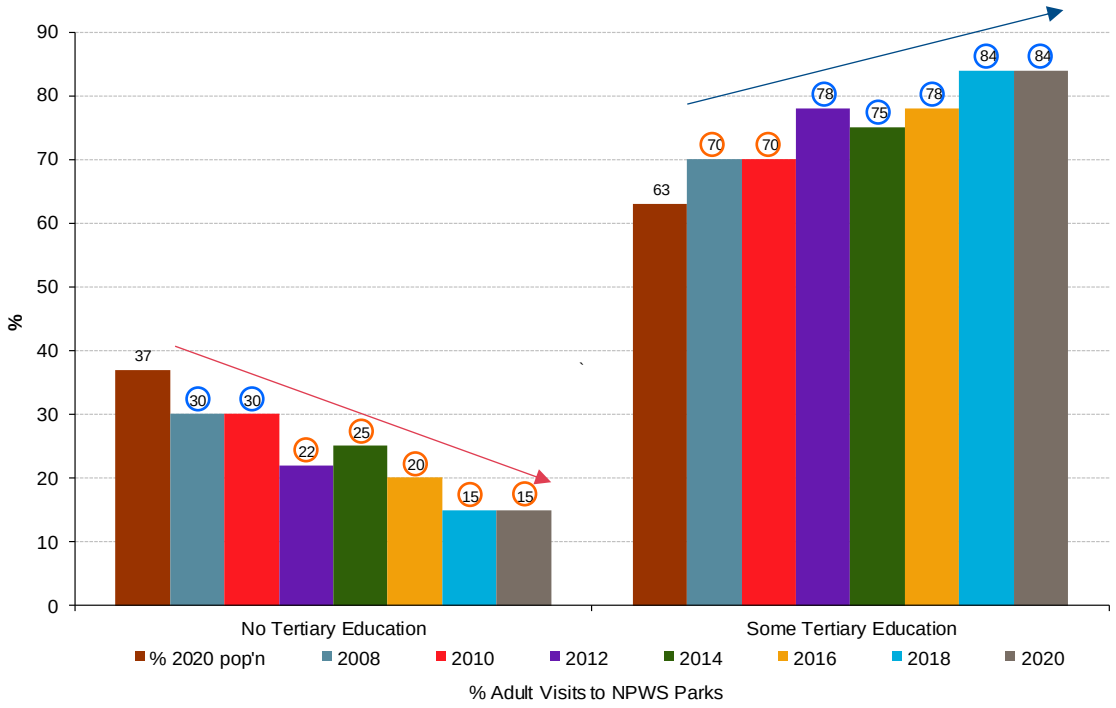


Source: NPWS Parks Visitor Surveys 2008 – 2020
Base: 2008 n=1,563; 2010 n=1,389; 2012 n=1,421; 2014 n=1,651; 2016 n=1,708, 2018 n=1,718; 2020 n= 1,178

Significantly lower
Significantly higher

In terms of visitation, there continues to be an increase in the proportion of visits from people with some tertiary education over time, with the proportion of visits from these people increasing to 84% in 2018 and 2020, with corresponding declines in visits from those with no tertiary education (down to 15% in 2020 – see Chart 79).

Chart 79: Visitation to NPWS Parks by Education Summary



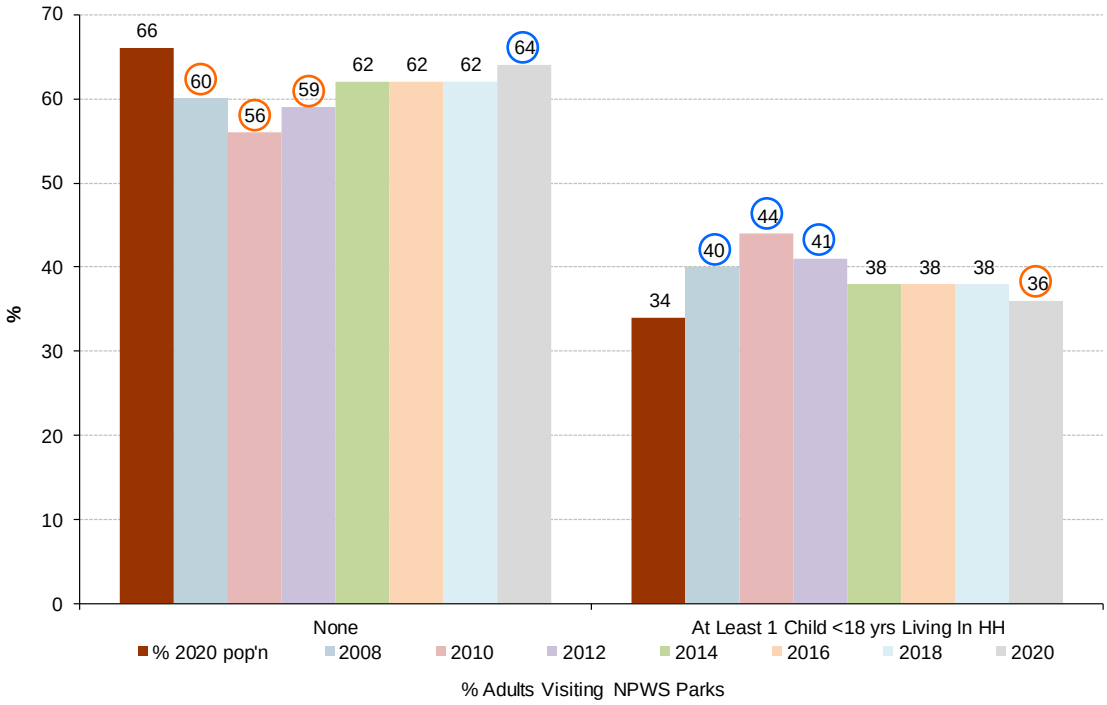
Source: NPWS Parks Visitor Surveys 2008 – 2020
Base: 2008 n=1,563; 2010 n=1,389; 2012 n=1,421; 2014 n=1,651; 2016 n=1,708, 2018 n=1,718; 2020 n=1,178

Significantly lower
Significantly higher

Overall the proportion of NPWS park visitors with 1, 2, 3 or 4 or more children in the household declined to its lowest levels in 2020 (36% - see Chart 80). Consequently, the proportion of visitors from households with no children increased to its highest levels in 2020 (64%).

As a result the proportion of visits from households with 1, 2, 3 or 4 or more children fell to its lowest level in 2020 (32% - see Chart 81), with visits from those with no children in the household increasing to 68% - its highest ever level.

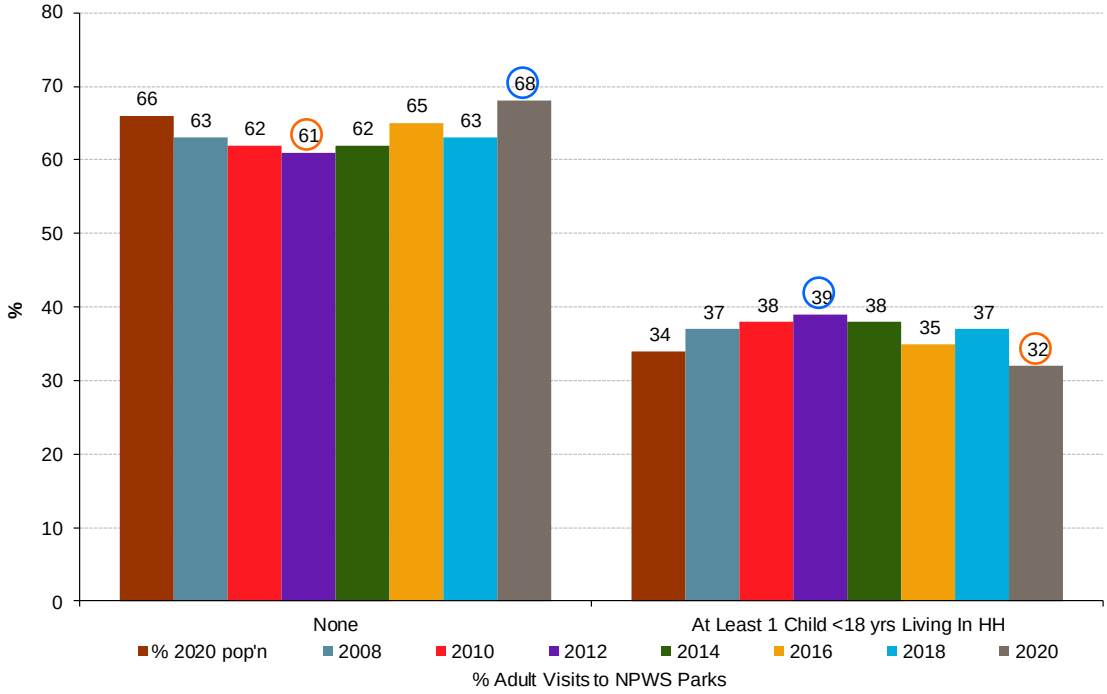
Chart 80: Visitors to NPWS Parks by Number of Children Under 18 Years in the Household



Source: NPWS Parks Visitor Surveys 2008 – 2020
Base: 2008 n=1,563; 2010 n=1,389; 2012 n=1,421; 2014 n=1,651; 2016 n=1,708, 2018 n=1,718; 2020 n= 1,178

Significantly lower
Significantly higher

Chart 81: Visitation to NPWS Parks by Number of Children Under 18 Years in the Household

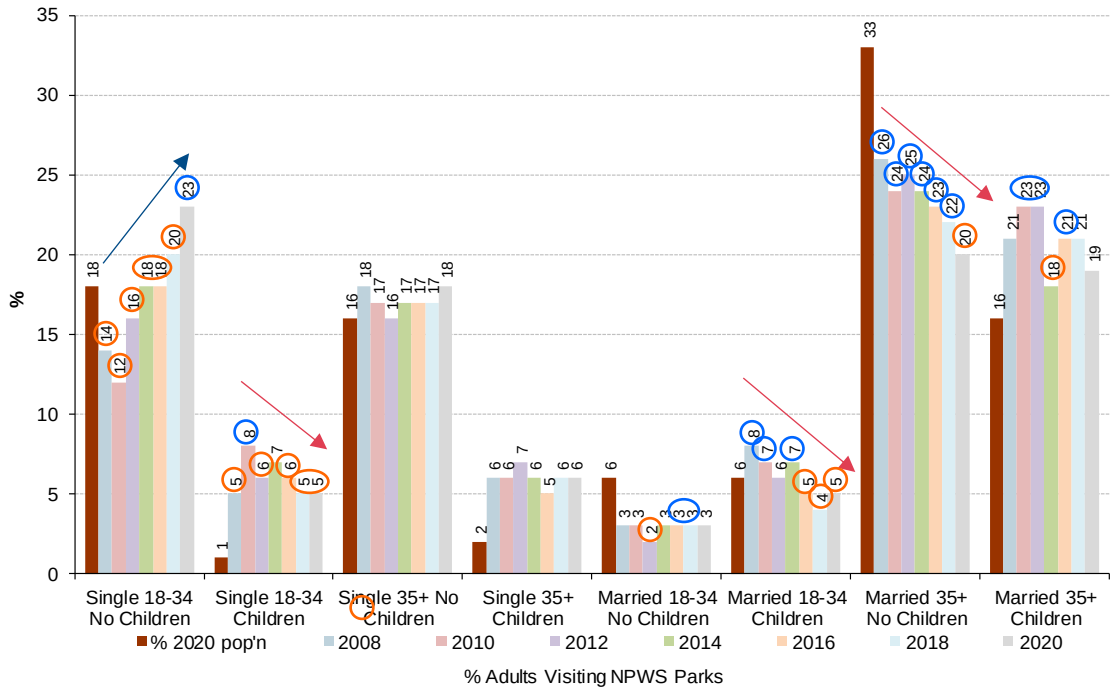


Source: NPWS Parks Visitor Surveys 2008 – 2018
Base: 2008 n=1,563; 2010 n=1,389; 2012 n=1,421; 2014 n=1,651; 2016 n=1,708, 2018 n=1,718

Significantly lower than 2018 estimate
Significantly higher than 2018 estimate

The proportion of visitors in 2018 who are single aged 18-34 years with no children is at its highest level recorded in 2020 (23%), while the opposite is the case in 2020 for those married aged 35 years and over without children (20% - Chart 82). There are downward trends in visitors evident in the proportion who are single aged 18-34 with children, married aged 18-34 with children and married aged 35 years and over with no children. There is an upward trend in the proportion of visitors from single households aged 18-34 with no children.

Chart 82: Visitors to NPWS Parks by Respondent Life-Cycle

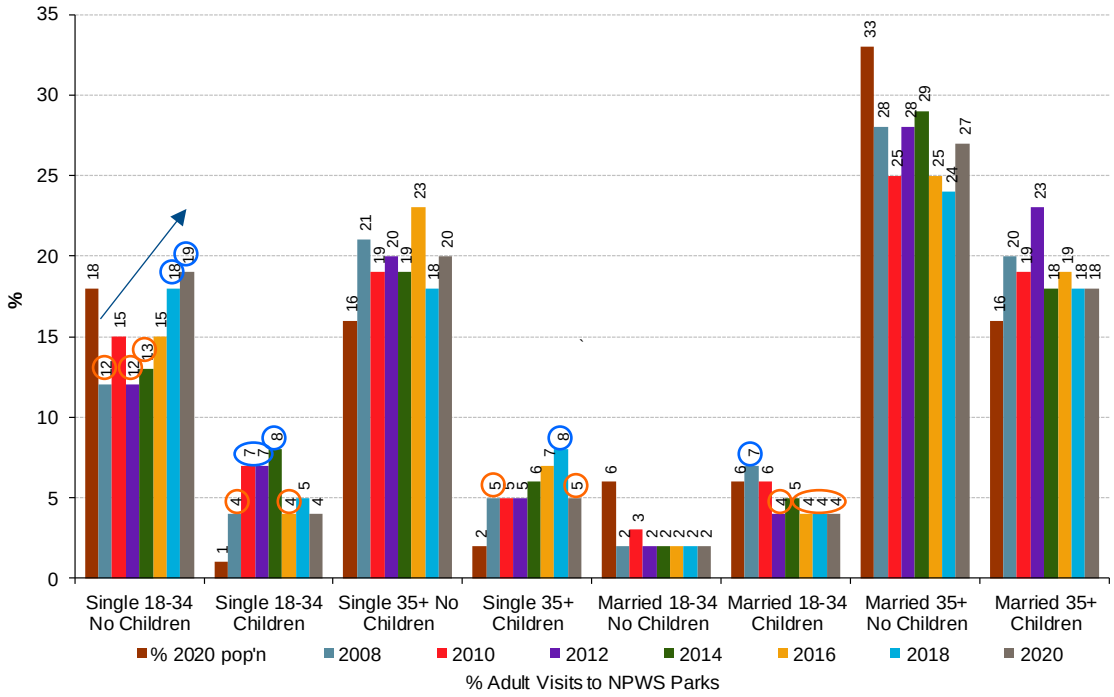


Source: NPWS Parks Visitor Surveys 2008 – 2020
Base: 2008 n=1,563; 2010 n=1,389; 2012 n=1,421; 2014 n=1,651; 2016 n=1,708, 2018 n=1,718; 2020 n= 1,178

Significantly lower
Significantly higher

In relation to visitation, the proportion of visits from singles aged 18-34 years with no children is at its highest level in 2020 (19% - Chart 83). An upward trend in visitation over time is evident amongst this segment of the population.

Chart 83: Visitation to NPWS Parks by Respondent Life-Cycle



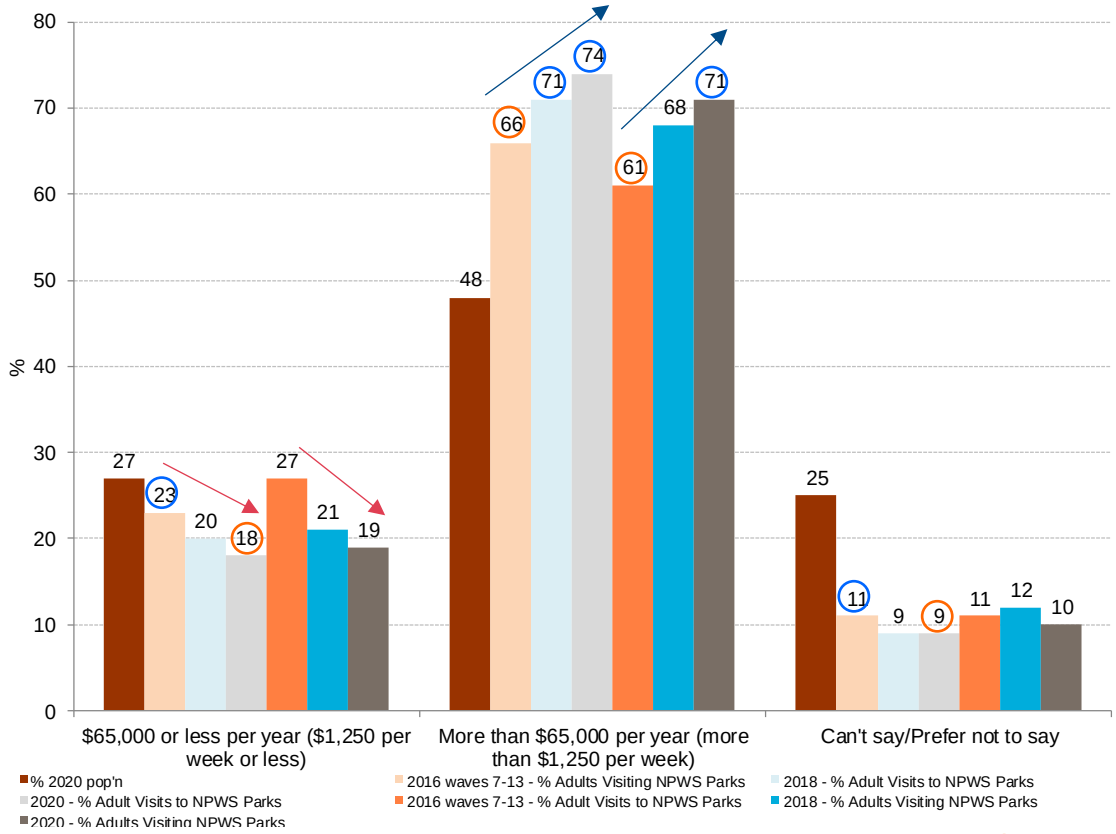
Source: NPWS Parks Visitor Surveys 2008 – 2020
Base: 2008 n=1,563; 2010 n=1,389; 2012 n=1,421; 2014 n=1,651; 2016 n=1,708, 2018 n=1,718; 2020 n= 1,178

Significantly lower
Significantly higher

From wave 7 in 2016, a new demographic question was asked of all respondents on household income before tax. Survey data has been compared with population data for the survey region (Table 84).

The proportion of NPWS visitors earning *$65,000 or less per year* has significantly declined since 2016 (from 23% to 18%, as have the proportion of visits for people earning this income, though not significantly so (See Chart 84). The proportion of visitors with household incomes of *more than $65,000 per year* has increased significantly since 2016 (66% to 74%), as has the proportion of visits (61% to 71%).

Chart 84: Visitation to NPWS Parks by Household Income (Wave 7-13 2016 to 2020)

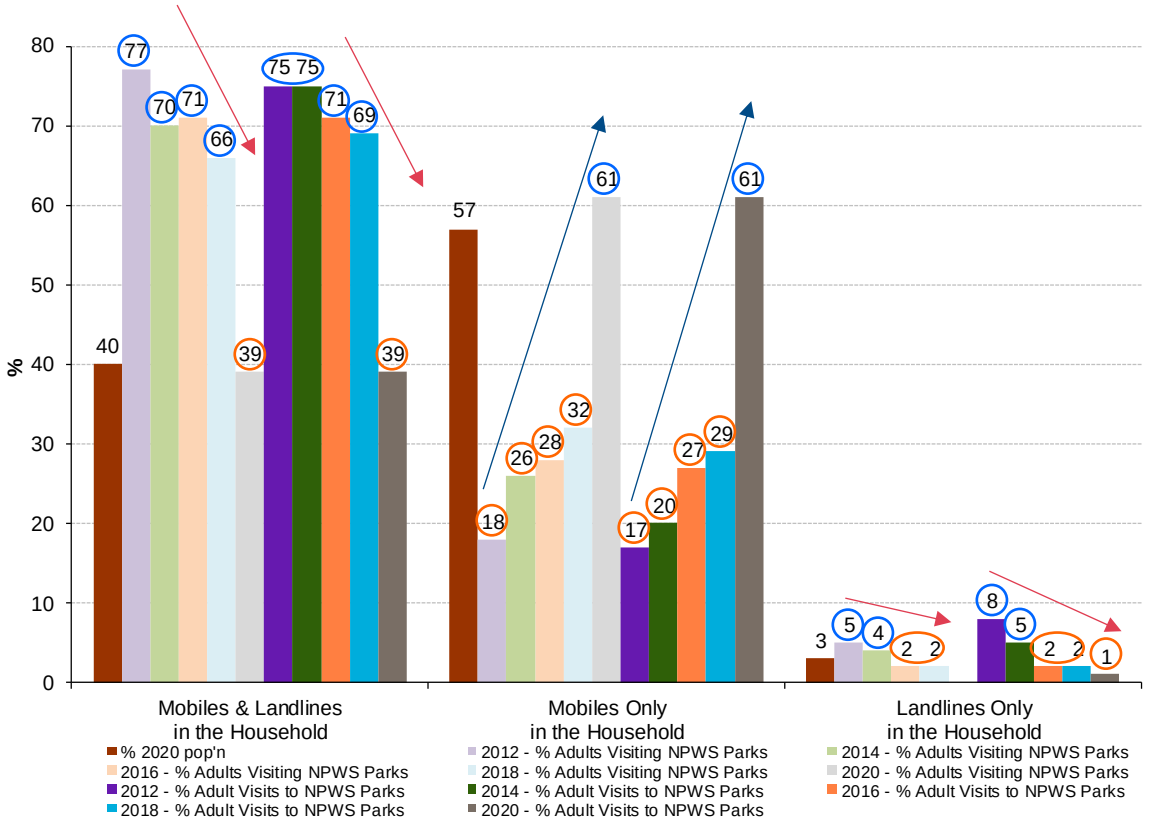


Source: NPWS Parks Visitor Surveys 2016 – 2020
Base: 2016 waves 7-13 n=8,427, 2018 n=15,644; 2020 n= 15,638

Significantly lower
Significantly higher

When analysing visitors to NPWS parks in terms of phone status, the proportion of visitors going to NPWS parks from households with both landline and mobile phones has been declining over time (Chart 85). The same trend is evident for households that only have landline phones in the household. The proportion of visitors to NPWS parks from mobile only households is increasing over time. These trends are in line with the general trend for home ownership in households over time in Australia. These same trends are also evident for adult visits to NPWS parks.

Chart 85: Visitors and Visitation to NPWS Parks by Phone Status



Source: NPWS Parks Visitor Surveys 2012 – 2020
Base: 2012 n=1,421; 2014 n=1,651; 2016 n=1,708, 2018 n=1,718; 2020n= 1,178

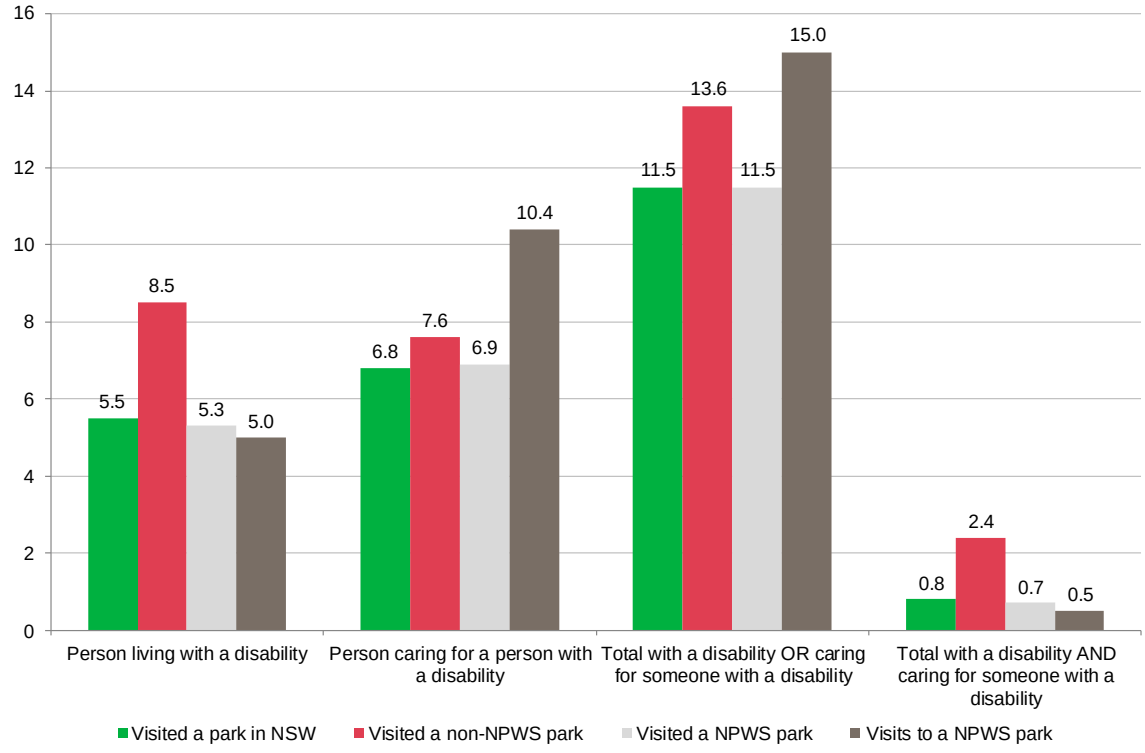
Significantly lower
Significantly higher

For the 2020 survey a new question relating to disability was asked of those who had visited a park in NSW in the last four weeks. Just over 5% of those visiting any type of park in NSW claimed to be a person living with a disability. This significantly under-estimates the proportion of people with a disability in Australia, with Australian Bureau of Statistics data indicating that 20% of the 18 years and over population in 2018 had a disability. Almost 7% of those visiting any type of park in NSW claimed to be a person caring for a person with a disability (Chart 86), while just under 1% had both a disability and cared for someone with a disability. Almost 9% of those visiting a non-NPWS park claimed to have a disability, compared with 5% of those visiting an NPWS park, which most likely indicates that non-NPWS parks, particularly local parks are more accessible to those with a disability. This was particularly evident for those living in regional NSW, where 9% of those visiting a NPWS park had a disability, but 16% of those visiting a non-NPWS park had a disability,

In terms of visits to NPWS parks in 2020, 2.5m visits were made from travel parties including a person with a disability, while 5.2m visits were made from travel parties which included a person who cares for a person with a disability (Chart 87).

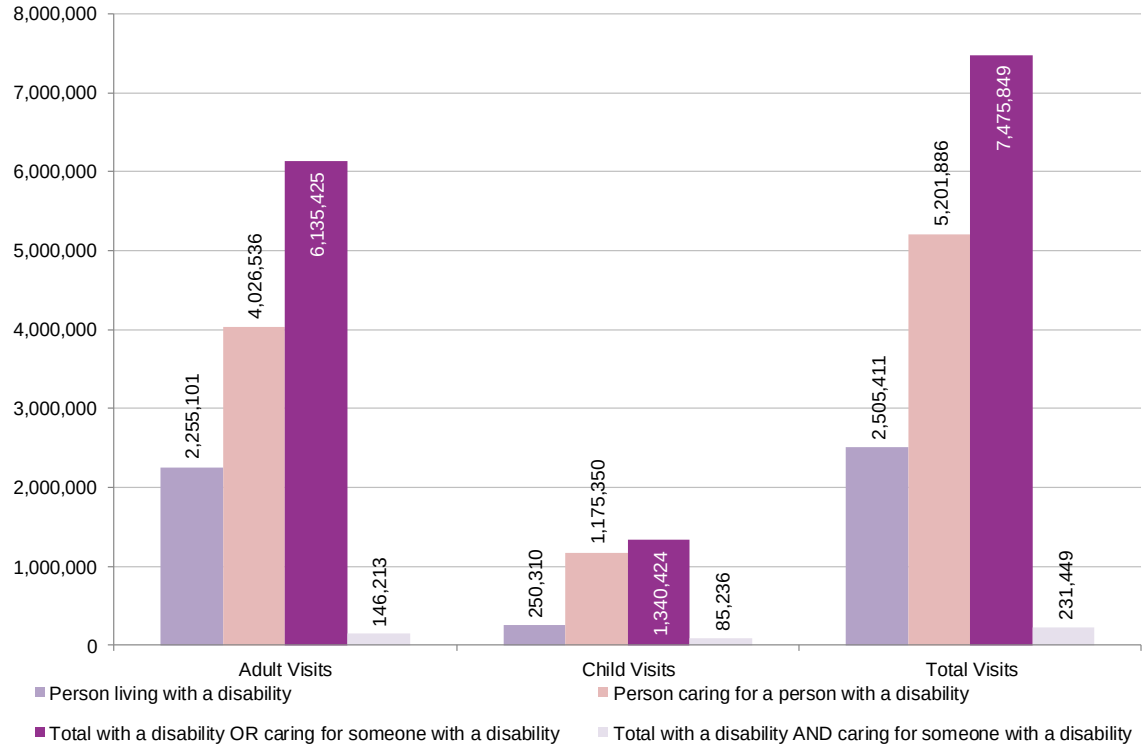
While the proportion of those with a disability who visited a NPWS park during the 2020 Bushfire period (10 Dec 2019 to 7 Mar 2020) did not differ statistically from the proportions visiting NPWS parks during the COVID-19 Affected period (4 Mar to 27 Jun 2020), or the COVID-19 Rebound period (23 Jun to 10 Dec 2020), the proportion of persons caring for a person with a disability did differ significantly for the Bushfire period (11%) compared with the COVID-19 Affected periods (4%) and the COVID-19 Rebound period (6%).

Chart 86: Visitors and Visitation to NPWS Parks by Disability Status 2020



Source: NPWS Parks Visitor Survey 2020
Base: Visited a park in NSW n=1,450; Visited a non-NPWS park n=348; Visited a NPSW park n=1,158

Chart 87: Visits to NPWS Parks by Disability Status 2020



Source: NPWS Parks Visitor Survey 2020
Base: Visited a NPSW park n=1,158

From the 2014 survey the question on languages usually spoken in the household was expanded to capture additional languages, with analysis provided below. Table 24 provides details of all languages spoken in the household by visitors to NPWS parks and by total visits made to NPWS parks. Cells highlighted in blue or red indicate that the figure in the cell is significantly higher or lower (respectively) than those in the opposing colour.

Whilst the proportion of people speaking English visiting a park is significantly lower in 2020 than in 2008, 2012 and 2014, the proportion of visits by people speaking English in 2020 is significantly higher than in 2016. While more than one in 10 visitors spoke a language other than English in 2020 (10.9%), only one in 12 visits were made by this cohort (8.4%).

There was a slight increase in the proportion of visitors to NPWS parks who speak Italian in 2020 (0.8%) and a significant increase in the proportion of visits undertaken by Italian speakers (1.5%). The proportion of visitors speaking Greek doubled from 2018 to 2020 (0.4% to 0.8%), with the proportion of visits from Greek speakers being the highest ever recorded (1.8%). Similarly the proportion of Russian speaking visitors was the highest recorded (0.6%) and contributed to 1,1% of visits.

Table 24: NPWS Visitors and Visits by Language Usually Spoken in the Household

Language	Visited a PWG Park in Last 4 weeks							Adult Visits to a PWG Park in Last 4 weeks						
	2008	2010	2012	2014	2016	2018	2020	2008	2010	2012	2014	2016	2018	2020
English	97.4%	96.8%	98.4%	97.4%	93.9%	96.5%	95.7%	98.8%	96.2%	98.8%	98.4%	95.9%	97.6%	97.8%
Total Languages other than English	**8.1%**	**7.6%**	**10.4%**	**10.9%**	**11.8%**	**9.7%**	**10.9%**	**6.0%**	**6.4%**	**10.8%**	**8.4%**	**9.8%**	**8.3%**	**8.4%**
Mandarin	1.2%	0.8%	0.6%	1.0%	1.5%	1.0%	1.1%	0.5%	1.9%	0.3%	0.8%	1.0%	0.4%	0.9%
Cantonese	0.3%	0.6%	0.4%	0.9%	1.2%	0.4%	1.0%	0.2%	0.2%	0.2%	0.5%	0.5%	0.2%	0.4%
Spanish	0.5%	0.7%	1.7%	1.1%	1.0%	0.7%	1.3%	1.0%	0.5%	1.2%	1.2%	0.9%	0.6%	0.6%
Arabic	0.1%	0.4%	0.7%	0.7%	0.7%	1.0%	0.4%	*	0.4%	0.7%	0.8%	0.4%	0.6%	0.2%
German	0.6%	0.6%	0.6%	0.3%	0.7%	0.8%	1.0%	1.1%	0.3%	0.7%	0.4%	0.6%	0.5%	0.8%
Italian	0.4%	0.3%	0.7%	0.6%	0.5%	0.7%	0.8%	1.5%	0.2%	0.9%	0.5%	0.3%	0.5%	1.5%
Hindi	0.4%	0.2%	0.2%	0.6%	0.5%	0.8%	0.6%	0.2%	0.1%	0.1%	0.3%	0.3%	0.6%	0.4%
Tagalog (Filipino)	0.2%	0.4%	0.2%	0.1%	0.4%	0.2%	0.4%	0.2%	0.2%	0.1%	*	0.3%	0.3%	0.3%
Greek	0.5%	0.1%	0.2%	0.6%	0.3%	0.4%	0.8%	0.9%	0.1%	0.2%	0.3%	0.2%	0.2%	1.8%
Vietnamese	0.5%	0.1%	0.1%	0.3%	0.1%	0.1%	0.1%	0.3%	*	*	0.2%	0.1%	0.1%	*
Aboriginal/ Indigenous Language	-	0.2%	0.2%	-	0.2%	0.2%	0.3%	-	0.2%	1.2%	-	0.9%	0.6%	0.2%
Other Languages -	4.0%	3.9%	6.4%	5.6%	5.8%	4.4%	4.1%	3.5%	2.7%	6.6%	4.2%	4.9%	4.4%	2.4%
French	n/a	n/a	n/a	0.7%	0.6%	0.9%	0.4%	n/a	n/a	n/a	0.5%	0.4%	0.7%	0.2%
Russian	n/a	n/a	n/a	0.3%	0.4%	0.2%	0.6%	n/a	n/a	n/a	0.1%	0.4%	0.2%	1.1%
Portuguese	n/a	n/a	n/a	0.3%	0.3%	0.3%	0.5%	n/a	n/a	n/a	0.3%	1.2%	0.2%	0.2%
Korean	n/a	n/a	n/a	0.5%	0.2%	*	-	n/a	n/a	n/a	0.2%	0.2%	*	*
Japanese	n/a	n/a	n/a	0.2%	0.1%	0.4%	0.3%	n/a	n/a	n/a	0.1%	*	1.1%	0.2%
Punjabi	n/a	n/a	n/a	*	0.1%	0.1%	0.1%	n/a	n/a	n/a	*	*	0.6%	*
Dutch	n/a	n/a	n/a	0.4%	0.2%	0.2%	0.2%	n/a	n/a	n/a	0.4%	0.1%	0.1%	0.1%
Macedonian	n/a	n/a	n/a	0.2%	-	0.1%	-	n/a	n/a	n/a	0.1%	-	0.1%	-
Other Languages	n/a	n/a	n/a	3.1%	3.9%	4.2%	4.1%	n/a	n/a	n/a	2.5%	2.5%	4.3%	2.4%

Note: Total sum to great than 100% as some visitors can speak multiple languages
Source: NPWS Parks Visitor Surveys 2008 – 2020
Base: 2008 n=1,563; 2010 n=1,389; 2012 n=1,421; 2014 n=1,644; 2016 n=1,705, 2018 n=1,718; 2020 n=1,178

* Less than 0.5% response.

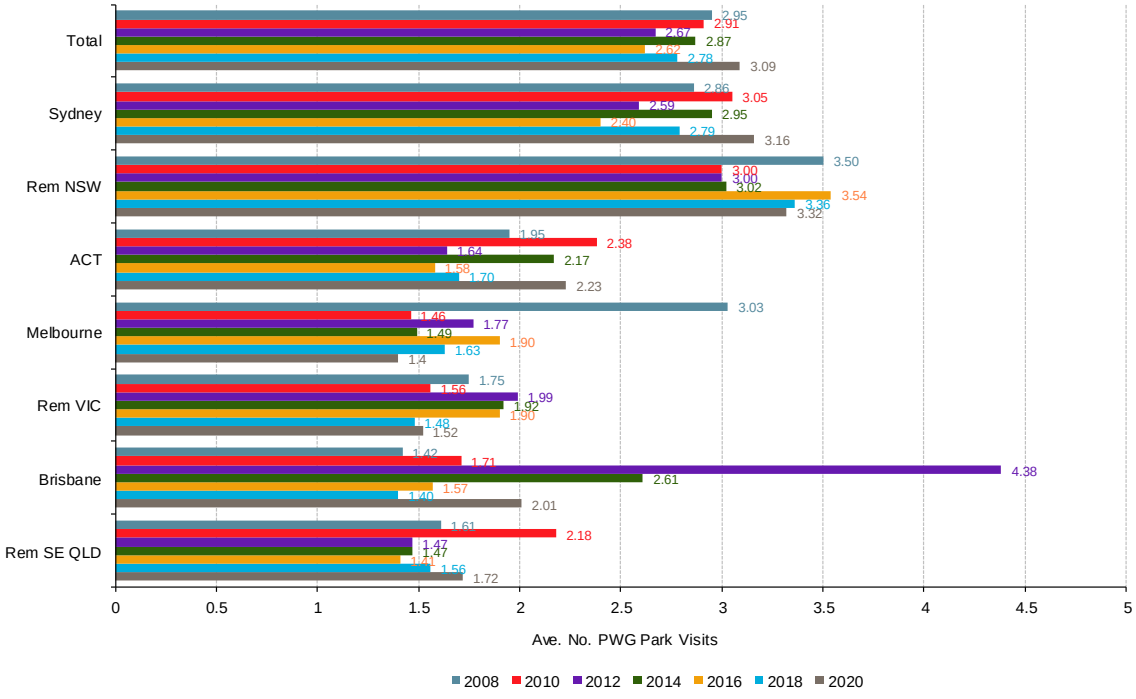
8.3 Number of Individual Visits made to NPWS Managed Parks by Adults

Detailed discussion of number of adult visits is provided in section 7.2 of this document (including Chart 44 and Chart 45) examining potential factors influencing NPWS park visitation, with a summary provided below.

The average number of visits by adults increased in 2020, from its lowest recorded figure in 2016 – 2.62 visits per adult visitor to 3.09 (Chart 88). By dividing total NPWS adult visits for each year by the average number of adult visits a *proxy* for the total number of adult visitors can be calculated (noting that this would not be unique adult visitors, as a visitor can visit a park in another 4 week visitation period over the course of the year). In 2020, the number of proxy adult visitors to NPWS parks was 12,423,157 compared with a high of 16,114,621 in 2018 and 15,043,090 in 2016. The number of proxy visitors in previous years ranges from 9.4m to 10.8m.

Average number of visits increased in almost all regions of origin from 2018 to 2020, with the exception of Melbourne (1.63 in 2018 to 1.40 in 2020), while average visits remained stable over time for remainder NSW (3.36 and 3.32 respectively).

Chart 88: Average Number of Adult Visits to NPWS Parks by Region of Origin

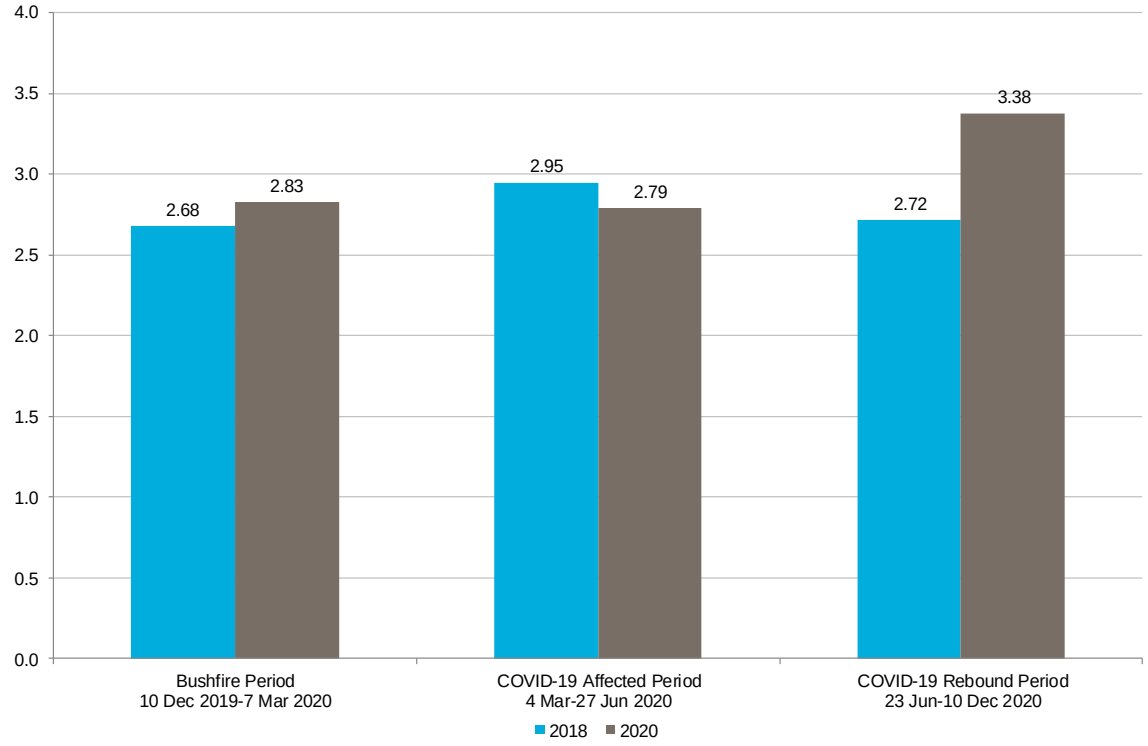


Source: NPWS Parks Visitor Surveys 2008 – 2020
Base: 2008 n=1,563; 2010 n=1,389; 2012 n=1,421; 2014 n=1,651; 2016 n=1,708, 2018 n=1,718; 2020 n= 1,178

Across all years, average number of visits to NPWS parks generally increases with age. In 2020 25-34 year olds had the lowest average number of visits (2.49), followed by 18-24 year olds (2.57), then 35-49 year olds (2.80), with those aged 50 years and over having the highest number of average visits (3.97), noting that the lowest proportion of people in this age group visited a NPWS park in 2020 (33%) (N.B. data is not shown graphically). In 2020 average number of visits increased on 2018 across all age groups.

Chart 89 shows that compared with the same time periods in 2018 the average number of visits in 2020 increased slightly during the Bushfire period (2.68 vs 2.83), but declined slightly during the COVID-19 Affected period (2.95 vs 2.79). However, average number of visits increased markedly in 2020 over 2018 levels during the COVID-19 Rebound period (2.72 vs 3.38).

Chart 89: Average Number of Adult Visits to NPWS Parks by COVID-19/Bushfire Periods



Source: NPWS Parks Visitor Surveys 2018 – 2020
Base: 2018 n=1,718; 2020 n= 1,178

8.4 Duration of Visit to a NPWS Park

In 2018 NPWS park visitors were asked a new question for each different NPWS park they visited namely the *duration* of their visit: This question was repeated in 2020.

> *On this occasion was your visit to this park just for the day or did you stay in it overnight or for multiple nights?*

Note that as respondents can visit more than one NPWS park in a given 4 week period, duration totals sum to more than 100%.

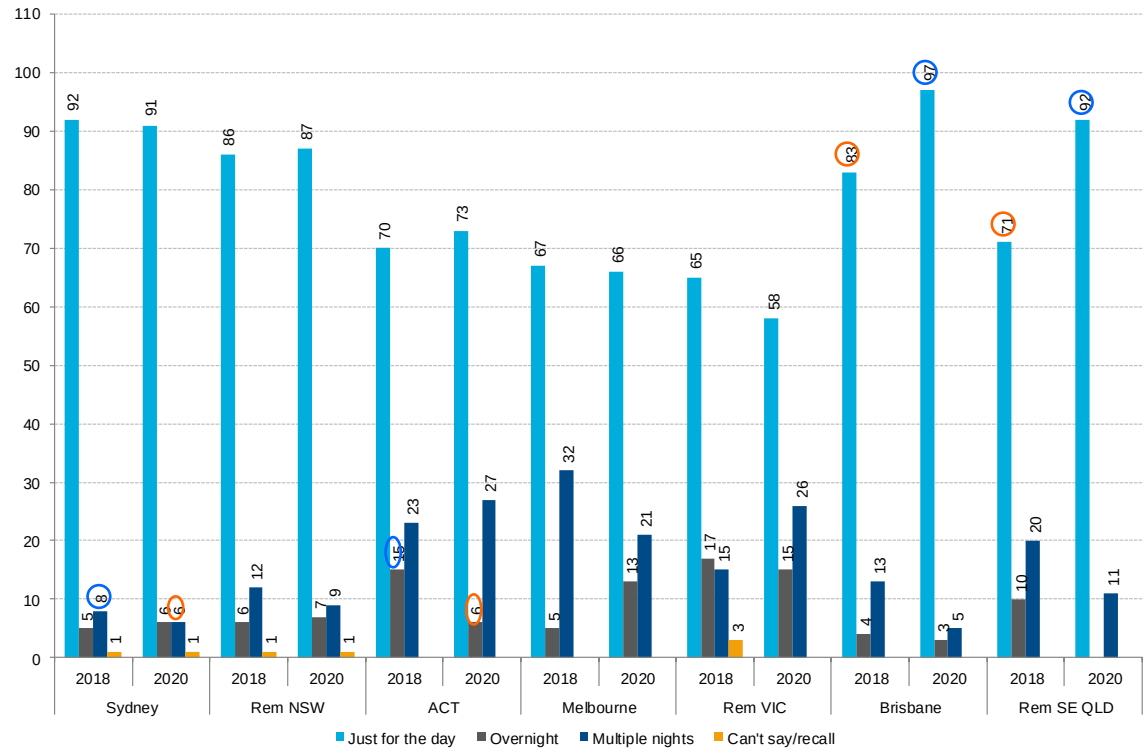
Almost nine in ten visits to NPWS parks were *just for the day* (89%) in 2020, similar to in 2018 (88%). Just 6%of visits were *overnight* in both 2018 and 2020, while 8% of visits in 2020 were for *multiple night* visits, significantly lower than in 2018 (11%).

Not surprisingly, visiting a NPWS park *just for the day* was more likely if there were a large number of proximate parks (see Chart 90). Over nine in ten visitors from Sydney visited *just for the day* in 2020 (92% - 91% in 2018), followed by 87% of those in remainder NSW (86% in 2018). Of interest

is that the proportion visiting just for the day in Brisbane (97%) and remainder southeast QLD (92%) in 2020 was significantly higher than in 2018 (83% and 71% respectively). This is likely due to the impact of COVID-19 restrictions on those living in Queensland who on occasion could cross the border to visit parks, but were uncertain whether the border would remain open for extended periods and therefore elected to visit just for the day.

As may be expected, those from regions of origin which are located further away from NPWS parks typically generate greater proportions of visitors taking at least an overnight trip. For example, 34% of Melbourne residents, 33% of ACT residents and 41% of remainder VIC residents visited a NPWS park in 2020 *at least overnight*. However, for Melbourne and ACT residents this high proportion still declined in 2020 (from 37% and 38% in 2018 respectively), while for remainder VIC the proportion increased (32% in 2018). A significant decline was observed in the proportion of ACT residents that visited NPWS parks overnight from 2018 to 2020 (15% to 6%) and from Sydney residents for multiple night stays (8% to 6%).

Chart 90: Duration of Visit to NPWS Park by Region of Origin

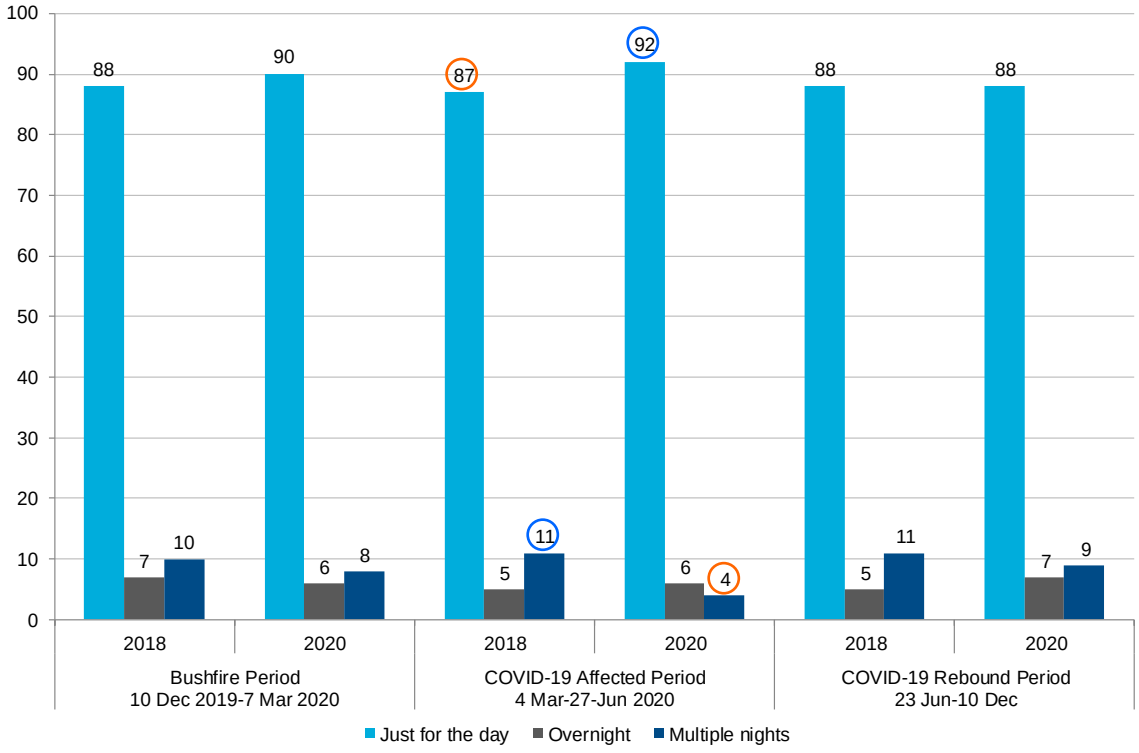


Source: NPWS Parks Visitor Surveys 2018-2020
Base: 2018 n=1,741; 2020 n= 1,178

Significantly lower
Significantly higher

Chart 91 shows that whilst duration of visit did not change markedly from 2018 to 2020 during the Bushfire and COVID-19 Rebound periods, there was a significantly shift in behaviour during the COIVD-19 Affected period. For this period the proportion of people visiting *just for the day* significantly increased from 87% in 2018 to 92% in 2020. Conversely, the proportion visiting for multiple nights fell significantly for this period from 11% in 2018 to 4% in 2020.

Chart 91: Duration of Visit to NPWS Park by COVID-19/Bushfire Periods

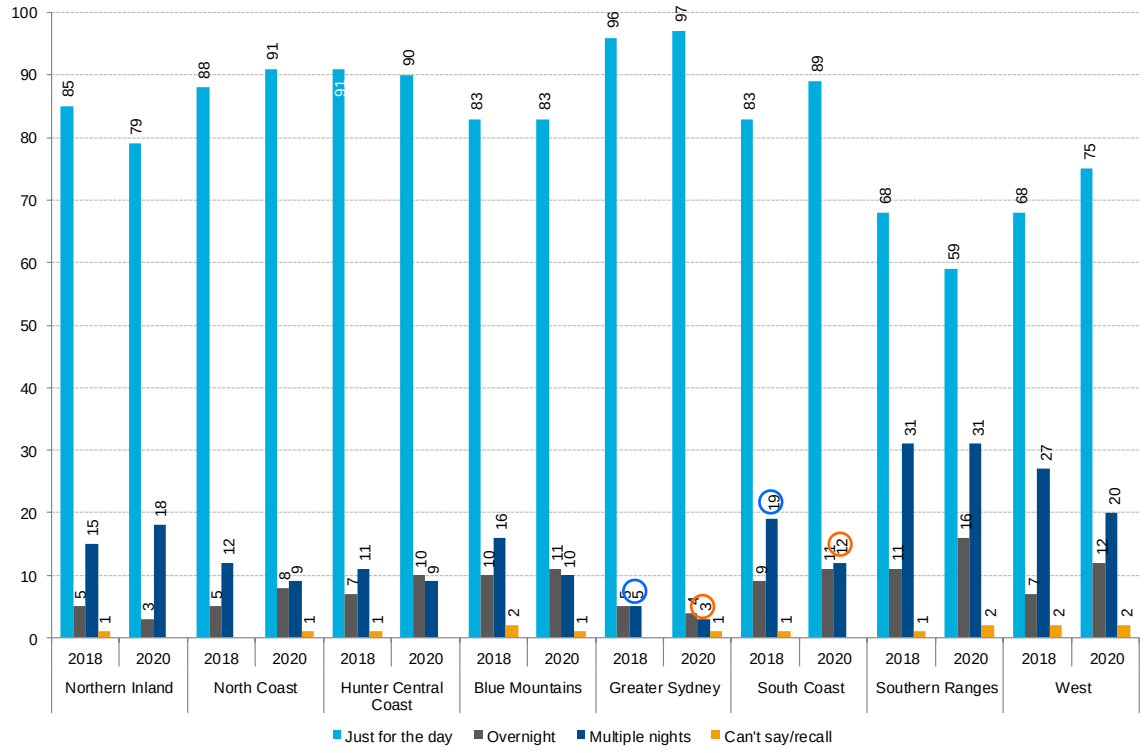


Source: NPWS Parks Visitor Surveys 2018-2020
Base: 2018 n=1,741; 2020 n= 1,178

Significantly lower
Significantly higher

Analysis of duration of trip by NPWS Management Branch (Chart 92) shows that the highest proportion of visits *just for the day* are to parks in the Greater Sydney Branch (97% - 2020; 96% - 2018), the North Coast Branch (91% - 2020 88% - 2018) and the Hunter Central Coast Branch (90% - 2020; 91% - 2018). The proportion of *at least overnight visits* is highest in the Southern Ranges Branch (47% - 2020; 42% - 2018) and the West Branch (32% 2020; 34% - 2018).

Chart 92: Duration of Visit to NPWS Park by NPWS Management Branch



Source: NPWS Parks Visitor Surveys 2018-2020
Base: 2018 n=1,741; 2020 n= 1,178

Significantly lower
Significantly higher

8.5 Type of Trip to a NPWS Park

As of wave 7 in 2016 (i.e. from the travel period 23 May to 12 December) adult NPWS park visitors were asked a new question for each different NPWS park they visited which related to their *purpose* of visit:

> *Was visiting this park part of a regular, daily, weekly or monthly routine; part of a day trip; part of an overnight visit or multi-day trip; or for some other reason?*

In 2018 the question wording was revised to take into account the sequencing impact of asking the *duration of park* visit question in advance of the *type of trip* question. Elaboration was required to ensure respondents understood that that the "type of trip" referred to their overall trip rather than their park specific trip. The new wording in 2018 was as follows:

> *Was visiting this park part of a regular, daily, weekly or monthly routine; part of a larger/bigger day trip; part of a larger/bigger overnight visit or multi-day trip; or for some other reason?*

The result of the change in wording was that responses to the question varied markedly between 2016 and 2018. It was determined that the re-wording of the question in 2018 significantly altered the manner in which the question was answered, constituting a break in the series. As a result, analysis for this section has been confined to 2018 and 2020 survey results only.

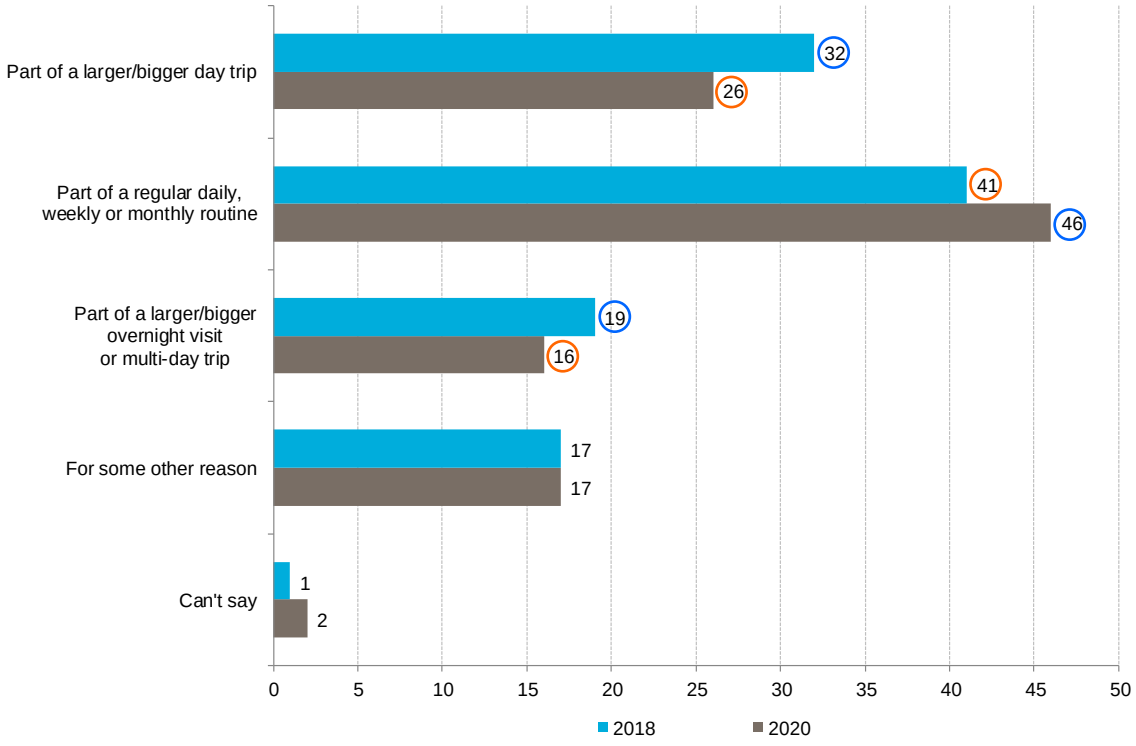
Note that whilst the question was asked as a single response question, respondents could visit more than one NPWS park in the 4 week survey period, so their type of visit could differ from park

to park. Overall, the question must be regarded as a multiple response question (i.e. the sum of all responses totals over 100%).

From 2018 to 2020 there has been significant falls in the proportion of visitors accessing NPWS parks as *part of a larger/bigger day trip* (32% down to 26%) or as *part of a larger/bigger overnight visit or multi-day trip* (19% down to 16% - Chart 93). However, there has been a significant increase in the proportion visiting as *part of a regular daily, weekly or monthly routine* (41% up to 46%). These differences are likely to be due in part to COVID-19 restrictions put in place. One of the reasons for being out of the house during COVID-19 restrictions was for exercise. Therefore, a regular exercise routine was likely to result in people visiting NPWS parks close to their home for exercise.

Chart 93:

Type of Trip to NPWS Park

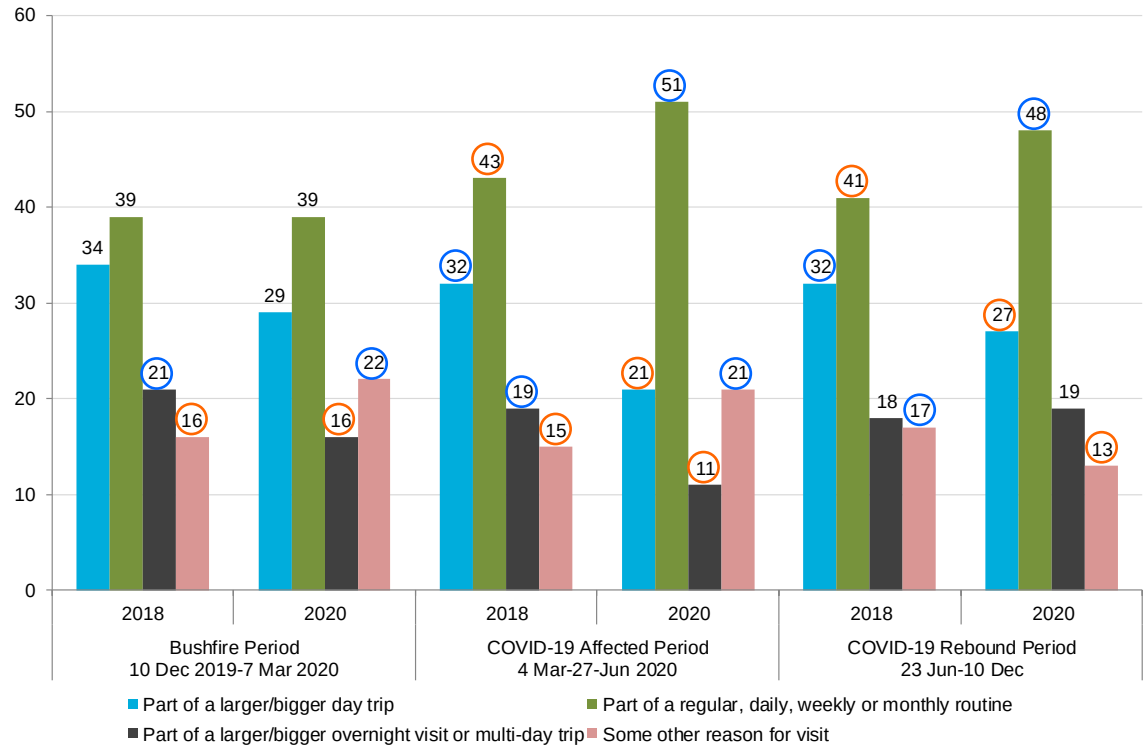


Source: NPWS Parks Visitor Surveys 2018-2020
Base: 2018 n=1,741; 2020 n= 1,220

Significantly lower
Significantly higher

Chart 94 indicates that COVID-19 restrictions did impact on the type of trip taken to NPWS parks. For the Bushfire period the proportion visiting NPWS parks as *part of a regular daily, weekly or monthly routine* was consistent at 39% in both 2018 and 2020. However, for the COVID-19 Affected period there was a significant increase in the proportion visiting as *part of a regular daily, weekly or monthly routine* from 2018 to 2020 (43% to 51%). This appears to indicate that people were taking advantage of the COVID-19 rules to get out of the house and visits a NPSW park regularly. The trend continued in the COVID-19 Rebound period as visits to an NPWS park as *part of a regular daily, weekly or monthly routine* were significantly higher at 48% in 2020 when compared with 41% in 2018. One can hypothesise that habits formed during the COVID-19 Affected period were maintained in the COVID-19 Rebound period.

Chart 94: Type of Trip to NPWS Park by COVID-19/Bushfire Periods



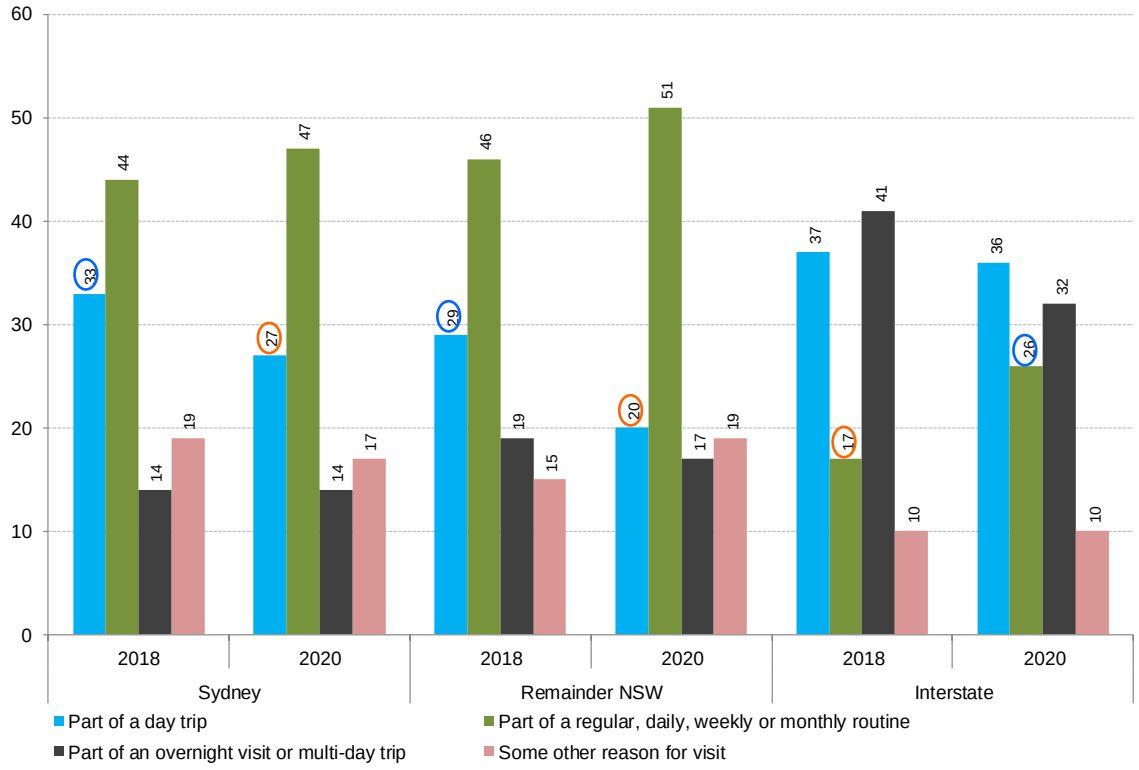
Source: NPWS Parks Visitor Surveys 2018-2020
Base: 2018 n=1,741; 2020 n= 1,220

Significantly lower
Significantly higher

Chart 95 shows type of trip by region of origin. From 2018 to 2020 there has been a significant decline in the proportion of visits *as part of a day trip* in both Sydney and remainder NSW (from 33% to 27% and from 29% to 20% respectively). Around 50% of visits in these two regions visit *as part of a regular daily, weekly or monthly routine*. In 2020 those living in interstate locations recorded significantly higher proportions of visits *as part of a regular daily, weekly or monthly routine when* compared with 2018 results (17% - 2018; 26% - 2020), with corresponding declines observed in proportions of those visiting a part of an overnight visit or multi-day trip (41% - 2018 32% - 2020).

When analysed by age there was a decline from 2018 to 2020 across all age groups for the proportion visiting NPWS parks *as part of a larger/bigger day trip* and for 18-49 year olds for visits as *part of a larger/bigger overnight visit or multi-day trip* (Chart 96). Increases from 2018 to 2020 in the proportions visiting as part of a regular daily, weekly or monthly routine were observed across all age groups, although the increase for 25-34 year olds was marginal

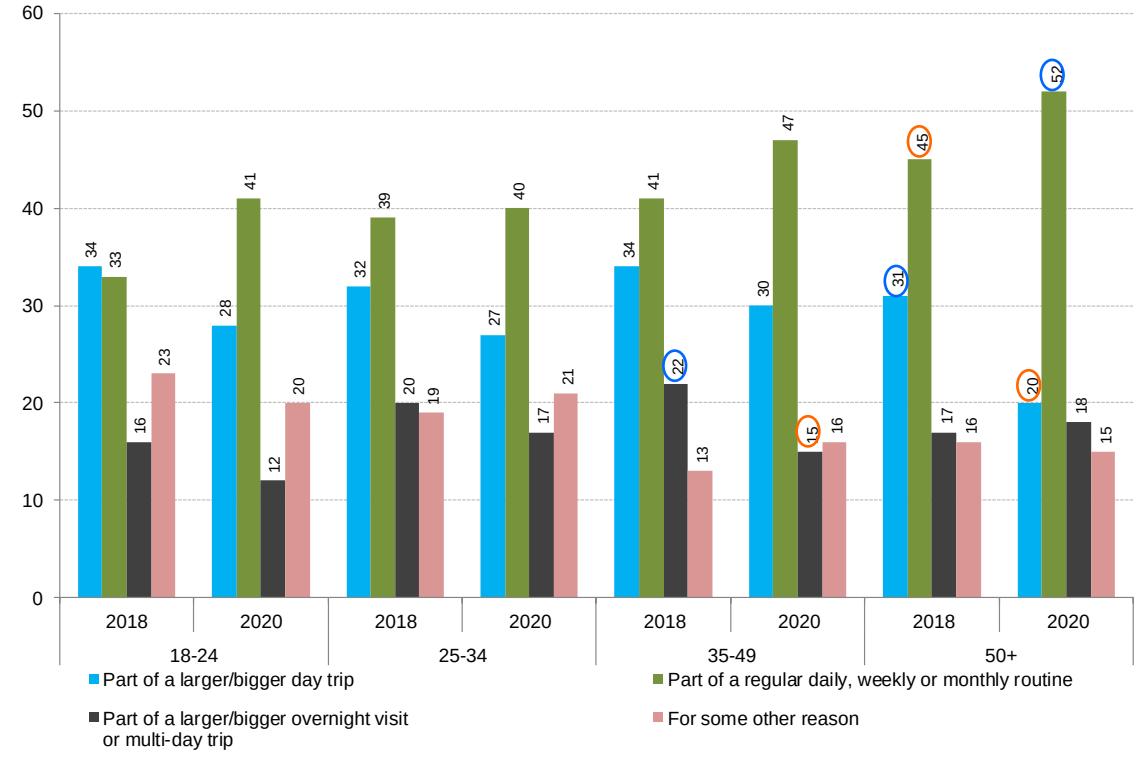
Chart 95: Type of Trip to NPWS Park by Region of Origin



Source: NPWS Parks Visitor Surveys 2018-2020
Base: 2018 n=1,741; 2020 n=1,220

Significantly higher
Significantly lower

Chart 96: Type of Trip to NPWS Park by Age

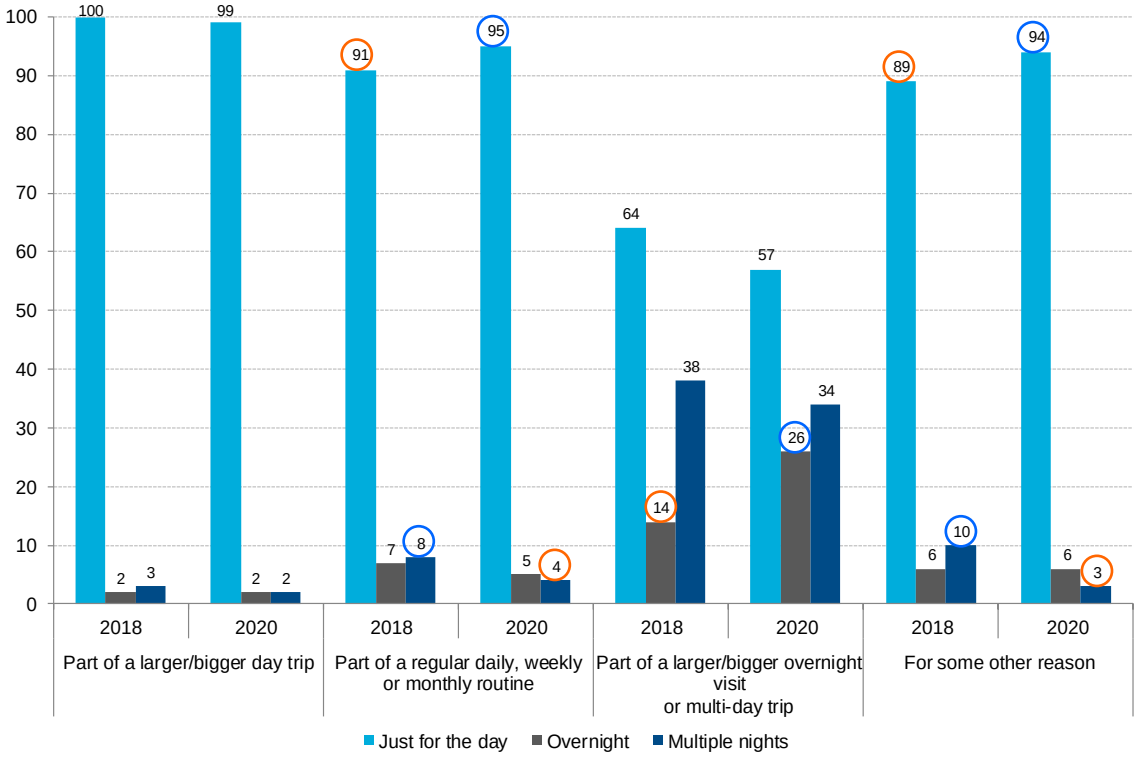


Source: NPWS Parks Visitor Surveys 2018-2020
Base: 2018 n=1,741; 2020 n=1,220

Significantly higher
Significantly lower

When duration of NPWS park visit is analysed by type of visit taken (Chart 97) it shows that visiting the park *just for the day* is the dominant duration across all visit types. Visiting *overnight* or for *multiple nights* is far more commonly nominated when the type of trip was part of a *larger/bigger overnight visit or multi-day trip*. Visiting a NSW NPWS park *just for the day* is significantly higher in 2020 than in 2018 for those whose visit was *part of a regular daily, weekly or monthly routine* (91% - 2018; 95% - 2020), with the proportion visiting for *multiple nights* declining significantly over the same period (8% - 2018; 4% - 2020). For those who visited a park as part of a larger/bigger overnight or multi-day visit the proportion visiting *overnight* increased significantly from 14% in 2018 to 26% in 2020. This is most likely at the expense of visiting for *multiple nights*.

Chart 97: Type of Visit to NPWS Park by Duration of NPWS Park Visit



Source: NPWS Parks Visitor Surveys 2018-2020
Base: 2018 n=1.741l 2020 n= 1,220

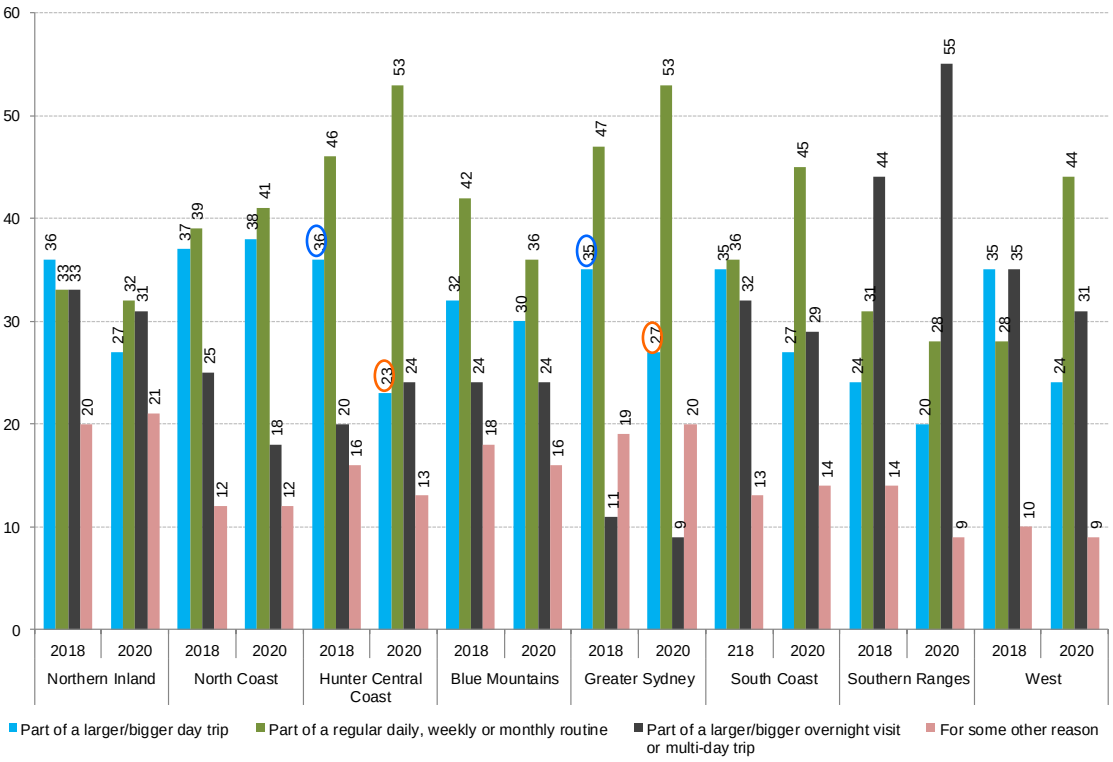
Significantly higher
Significantly lower

Visits to NPWS parks are more likely to be undertaken as *part of a regular routine* when visiting parks in Greater Sydney and Hunter Central Coast Branches. This is because a large proportion of the urban population live in close proximity to parks in these two Branches, thereby facilitating regular visitation (Chart 98). Visits as part of a *larger/bigger overnight or multi-day trip* are more common among in branches which are more remote from major population centres (Sydney, Newcastle and Wollongong) such as the Southern Ranges, and to a lesser extent the West, Northern Inland and South Coast Branches.

The incidence of NPWS park visits being undertaken as *part of larger/bigger day trips* declined from 2018 to 2020 for all branches except the North Coast Branch (37% - 2018; 38% - 2020), declining significantly so for the Hunter Central Coast (36% - 2018; 23% - 2020) and the Greater Sydney Branches (35% - 2018; 27% - 2020). The proportion of visitors visiting parks *as part of a regular daily, weekly or monthly routine* increased from 2018 to 2020 for the North Coast, Hunter

Central Coast, Greater Sydney, South Coast and West Branches. Proportions visiting *as part of larger/bigger overnight or multi-day trips* generally declined from 2018 to 2020 across most Branches, the exceptions being the Hunter Central Coast and Southern Ranges Branches, where increases were observed and the Blue Mountains Branch where proportions remained stable (24%) in each year.

Chart 98: Type of Visit to NPWS Park by NPWS Branch



Source: NPWS Parks Visitor Surveys 2018-2020
Base: 2018 n=1.741; 2020n= 1,220

Significantly higher
Significantly lower

8.6 Role of NPWS Park Visit in Trip Decision

As of wave 7 in 2016, adult NPWS park visitors were asked a new question for each different NPWS park they visited in relation to their reason for visit:

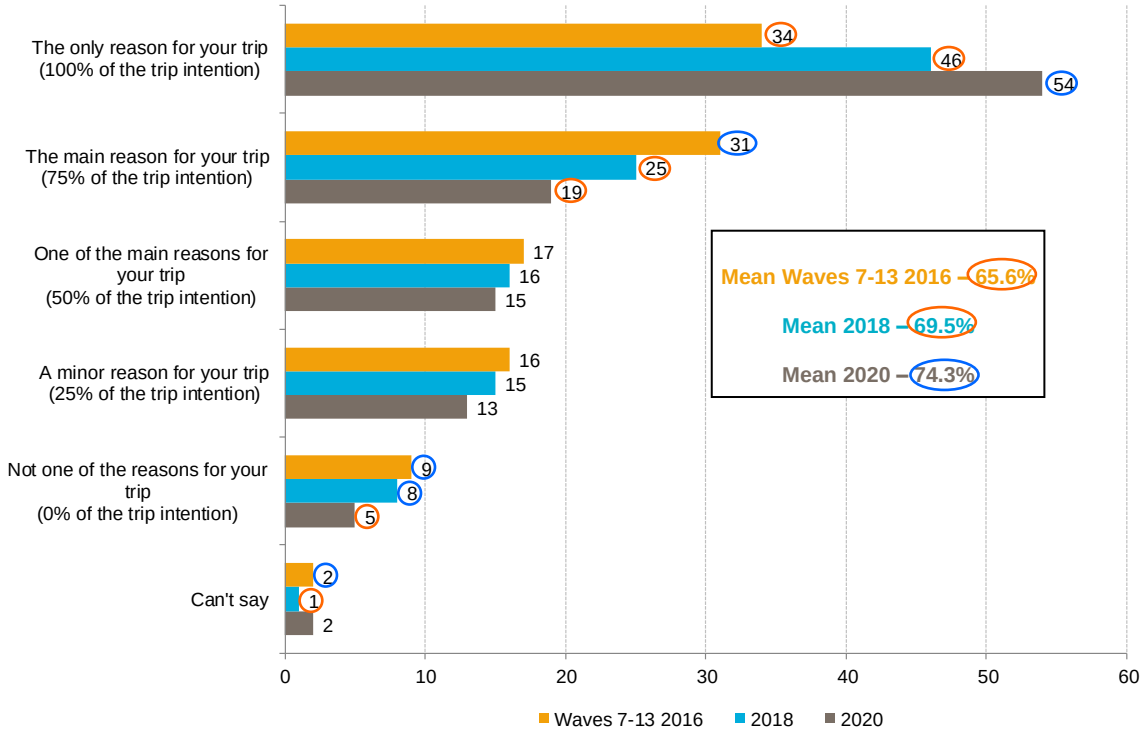
> *Was visiting this park the only reason for your trip (100% of the trip purpose or intention); the main reason for your trip (75% of the trip purpose or intention); one of the main reasons for your trip (50% of the trip purpose or intention); a minor reason for your trip (25% of the trip purpose or intention); or not one of the reasons for your trip (0% of the trip purpose or intention)?*

This question was again asked for the 2018 and 2020 surveys. Note that whilst the question was asked as a single response question, respondents could visit more than one NPWS park in the 4 week survey period, so the reason for their visit to each park could differ from park to park. Overall, the question must be regarded as a multiple response question (i.e. the sum of all responses totals over 100%). In addition, the *mean reason* for one's visit could be calculated based on percentages allocated to each response option (i.e. 100% for the only reason through to 0% for not one of the reasons).

Chart 99 shows that over half of NPWS park visitors in 2020 indicated that their *only reason* for their trip was to visit the NPWS park (54%), significantly higher than the result obtained for 2018 (46%) and waves 7-13 in 2016 (34%). It can be seen that proportions are declining over time for all other roles that the park visit had in terms of intention for one's trip, with 2020 proportions the lowest for the park being the *main reason for one's trip* (19%), *one of the main reasons for one's trip* (15%), *a minor reason for one's trip* (13%) and *not one of the reasons for one's trip* (5%),

Because of the higher proportion nominating their NPWS park visit as their *only reason* for their trip in 2020 than in in previous years, the mean score derived in 2020 is significantly higher than the 2018 and 2016 means (74.3% c.f. 69.5% c.f. 65.6% respectively).

Chart 99: Role of NPWS Park Visit in Trip Decision

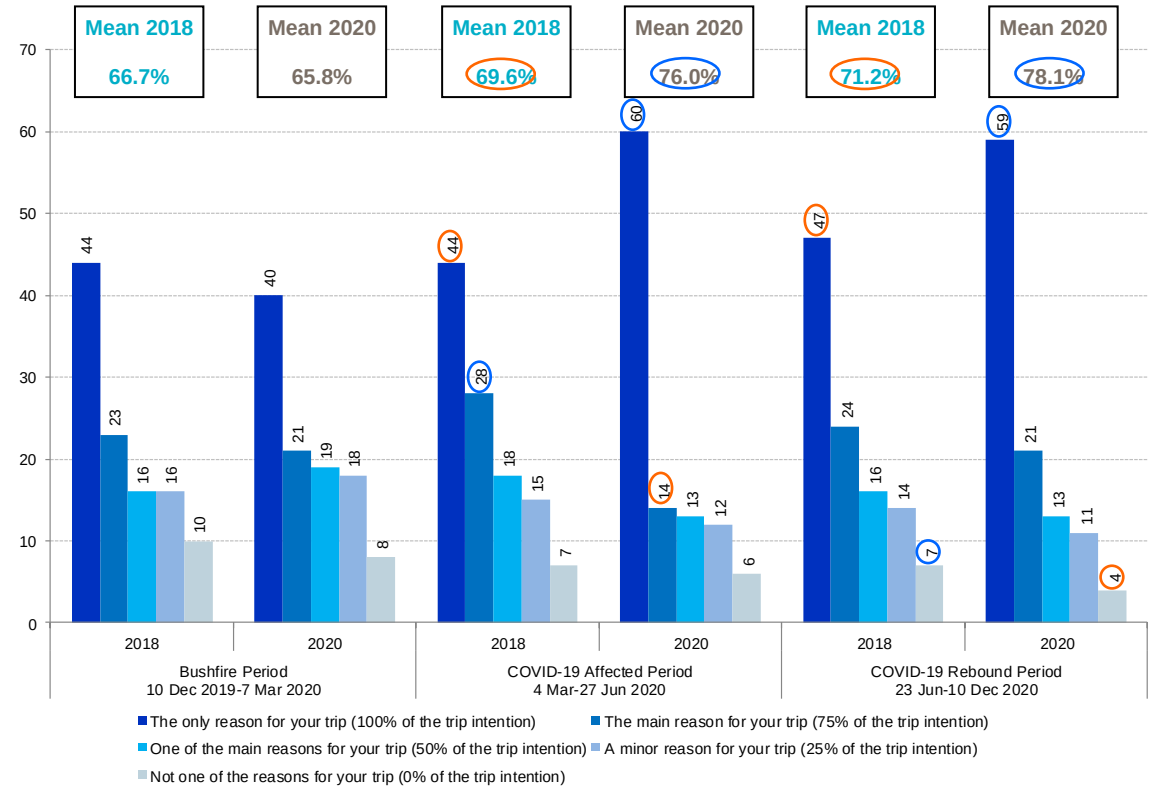


Source: NPWS Parks Visitor Surveys 2016–2020
Base: Wave 7-13 2016 n=849, 2018 n=1,741; 2020 n=1,220

Significantly higher
Significantly lower

Chart 100 shows that the increase from 2018 to 2020 in the proportion of respondents claiming that their visit to an NPWS park was *the only reason for their visit* occurred during the COVID-19 Affected period (44% - 2018; 60% - 2020) and continued into the COVID-19 Rebound period (47% - 2018; 59% - 2020). This trend was not evident during the Bushfire Period (44% - 2018; 40% - 2020). In fact, the mean score derived in 2020 was significantly higher than the 2018 mean score for both the COVID-19 Affected period (69.6% - 2018; 76.0% - 2020) and the COVID-19 Rebound period (71.2% - 2018; 78.1% - 2020). This indicates that there was a conscious decision to specifically visit an NPWS park whilst COVID-19 restrictions were in place (i.e. a park visit was a potential avenue for leaving the house during restrictions – for exercise) and this focus of trip intention remained in place well after COVID-19 restrictions were lifted. It will be interesting to see whether the proportion claiming that their visit to an NPWS park was *the only reason for their visit* maintains 2020 levels in 2022.

Chart 100: Role of NPWS Park Visit in Trip Decision by COVID-19/Bushfire Periods

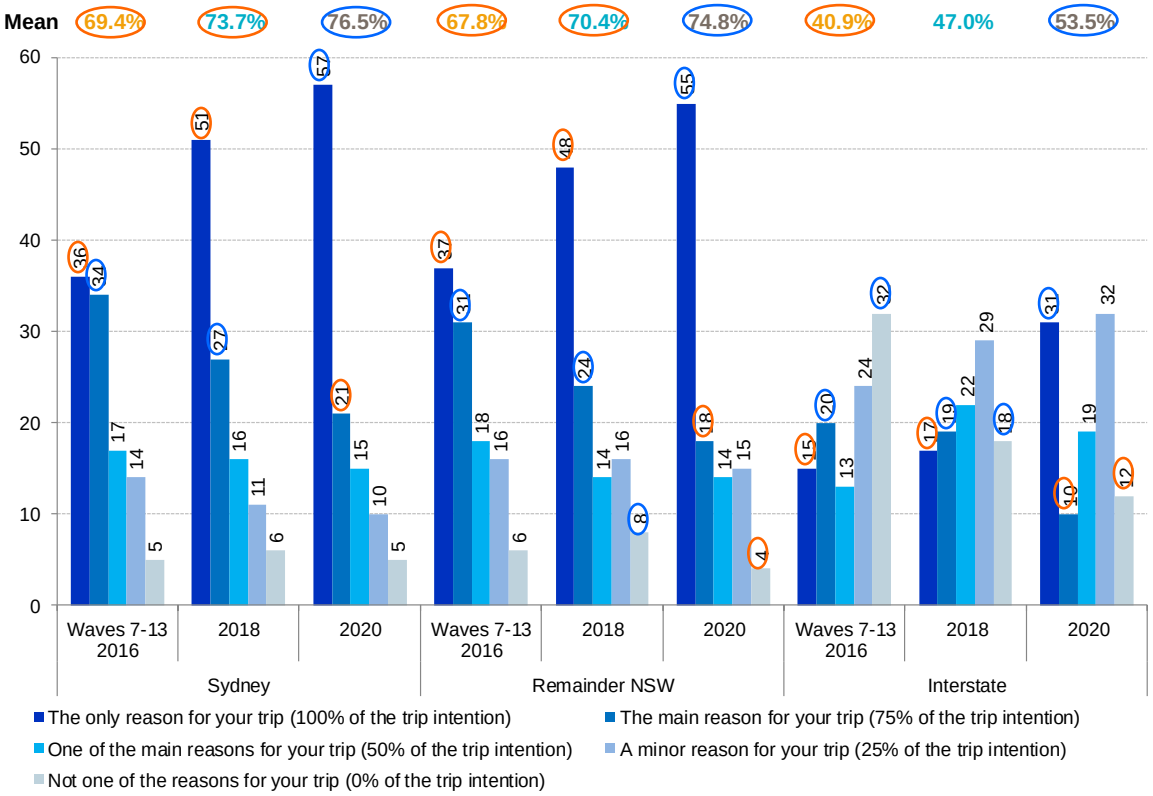


Source: NPWS Parks Visitor Surveys 2016–2020
Base: Wave: 2018 n=1,741; 2020 n=1,220

Significantly higher
Significantly lower

Further analysis by region of origin (Chart 101) shows that visiting a NPWS park being *the only reason for their visit* increased significantly across all regions in 2020 from both 2016 and 2018 results. While the proportion claiming that their NPWS park visit was their *only reason for their visit* was markedly lower for interstate visitors than it was for Sydney and remainder of NSW visitors in 2020 (31% c.f. 57% and 55% respectively), it was still close to the leading response for interstate visitors (with *a minor reason for the trip* being 32% in 2020). Consequently the mean score increased from 40.9% in 2016 to 47.0% in 2018 to 53.5% in 2020 for interstate visitors (increasing significantly when compared with 2016 results). Similarly, mean scores for both Sydney residents and remainder NSW were significantly higher in 2020 than in both 2016 and 2018 (Sydney: 69.4% - 2016; 73.7% - 2018; 76.5% - 2020; Remainder NSW: 67.8% - 2016; 70.4% - 2018; 74.8% - 2020). It can therefore be concluded that greater proportions are now planning their trip to specifically visit a NPWS park irrespective of where they live – interstate or intrastate.

Chart 101: Role of NPWS Park Visit in Trip Decision by Region of Origin



Source: NPWS Parks Visitor Surveys 2016–2020
Base: Wave 7-13 2016 n=849, 2018 n=1,741; 2020 n=1,220

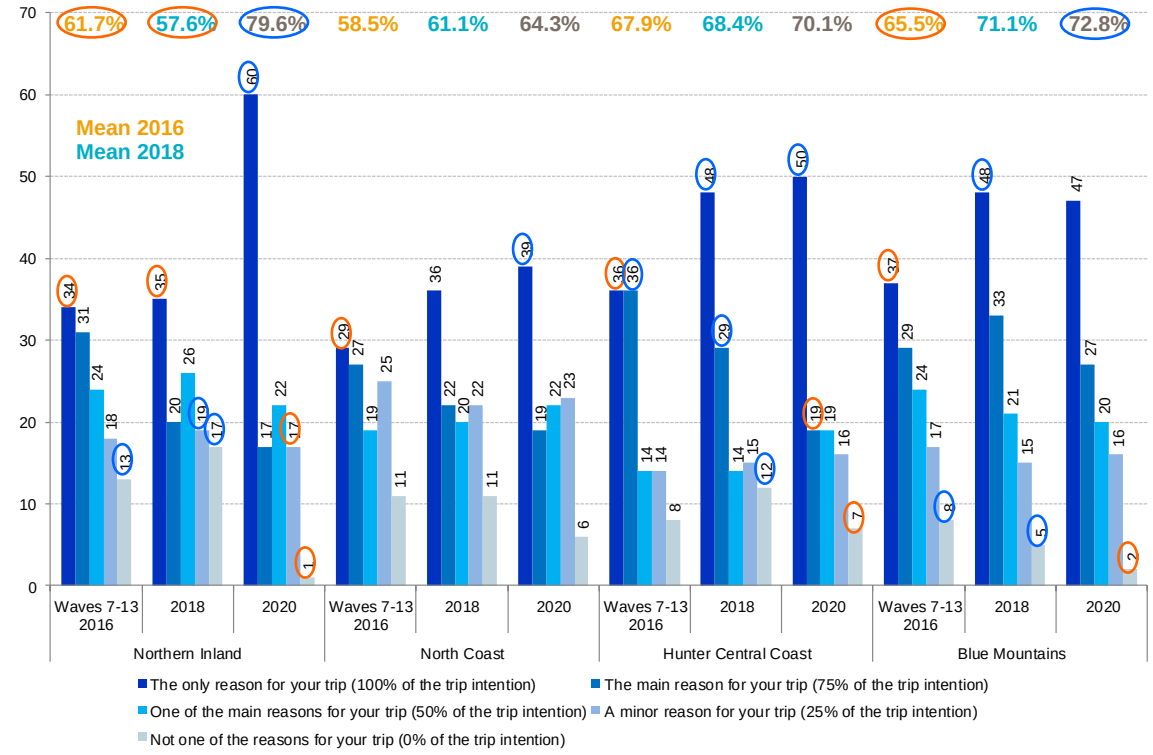
Significantly higher
Significantly lower

An increase from 2016 to 2020 in the proportion of NPWS park visitors claiming that their visit was the *only reason* for their trip was evident across all NPWS Management Branches, significantly so for all except the Blue Mountains and West Branches (Charts 102 and 103). The proportion of visitors to the South Coast Branch indicating that their visit to an NPWS park was their *only reason* for visiting increased from 15% in 2016 to 53% in 2020. Similar increases were evident for visitors to the Southern Ranges (38% - 2016; 66% - 2020), Northern Inland (34% - 2016; 60% - 2020), Greater Sydney (39% - 2016; 63% - 2020) and West Branches (21% - 2016; 43% - 2020).

Mean scores have also increased over time across all Branches, significantly so in 2020 for the Northern Inland, Blue Mountains, Greater Sydney, South Coast and West Branches. The mean score from for the West Branch has increased from 45.6% in 2016 to 65.8% in 2020. Other marked increases were evident for the South Coast Branch (49.5% - 2016; 67.2% - 2020) and Northern Inland Branches (61.7% - 2016; 79.6% - 2020).

The highest mean score in 2020 came from Northern Inland Branch (79.6%), while the lowest came from the North Coast Branch (64.3%). The highest proportion of visitors visiting NPWS parks as their *only reason* for visiting were in the Southern Ranges Branch (66%), whilst the lowest came from the North Coast Branch (39% - note however that this result was still significantly higher than in 2016 (29%).

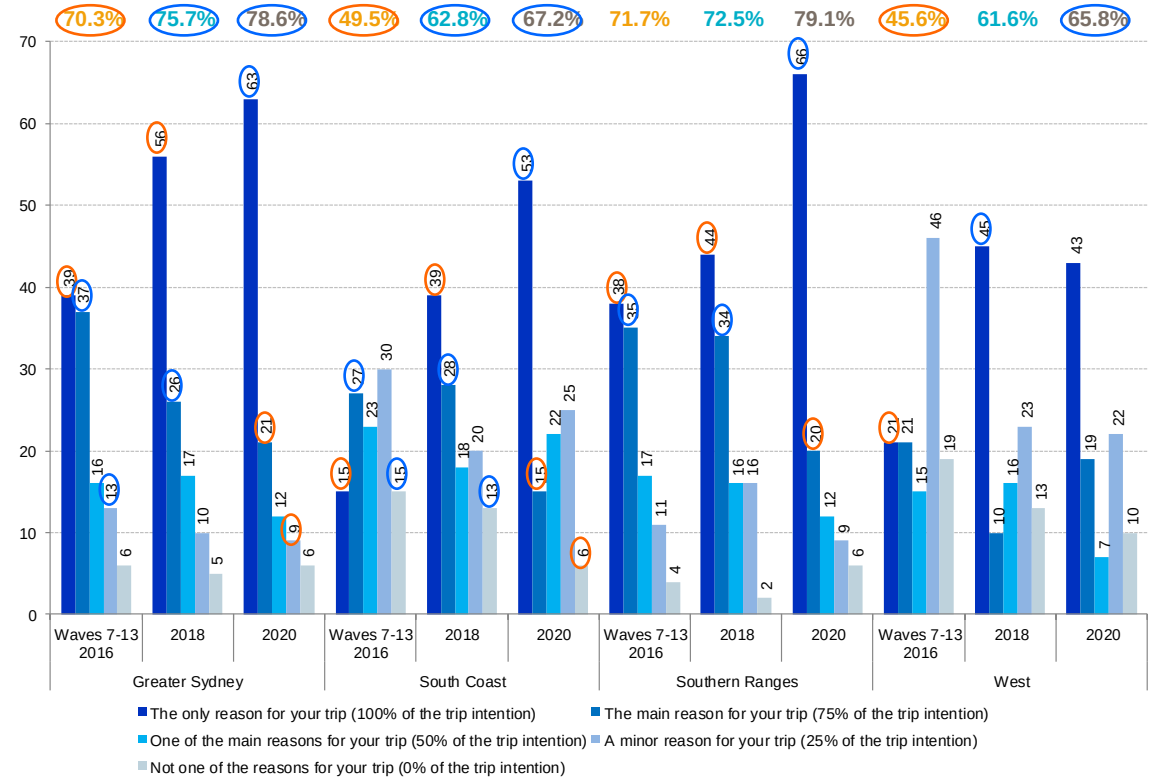
Chart 102: Role of NPWS Park Visit in Trip Decision by NPWS Branch 1



Source: NPWS Parks Visitor Surveys 2016-2020
Base: Wave 7-13 2016 n=849, 2018 n=1,741; 2020 n=1,220

Significantly higher
Significantly lower

Chart 103: Role of NPWS Park Visit in Trip Decision by NPWS Branch 2

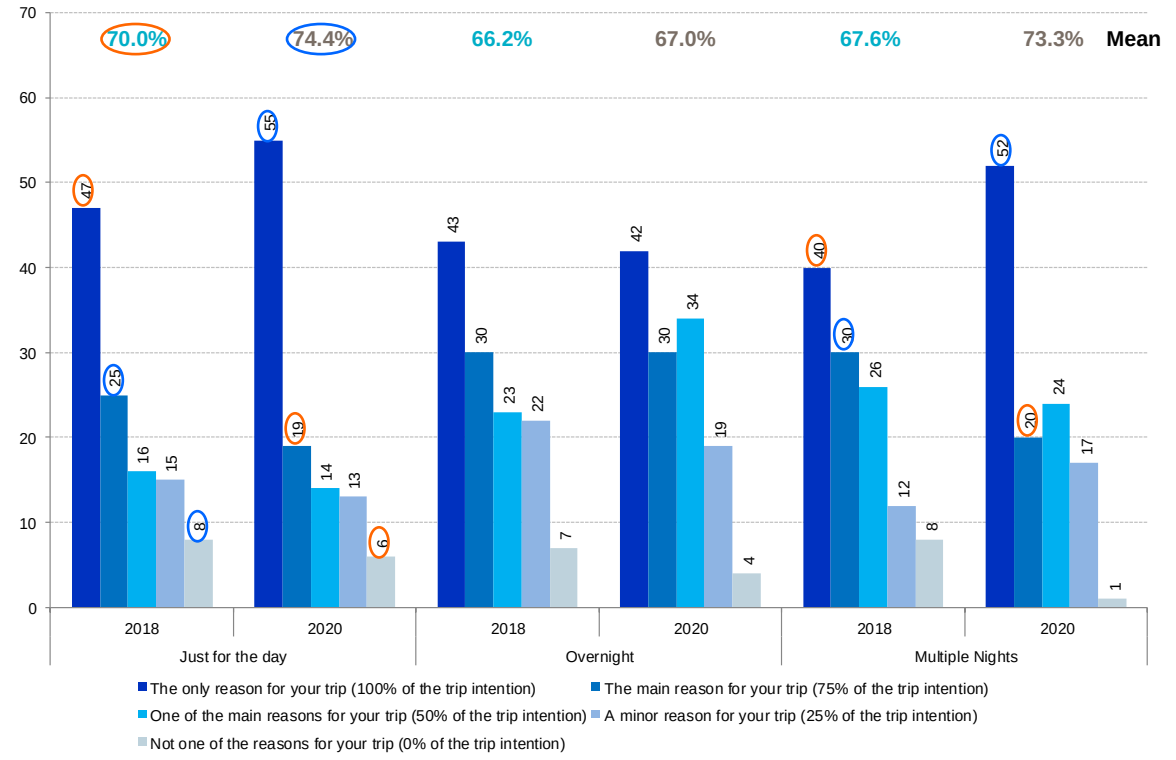


Source: NPWS Parks Visitor Surveys 2016–2020
Base: Wave 7-13 2016 n=849, 2018 n=1,741; 2020 n=1,220

Significantly higher
Significantly lower

When role of NPWS visit is analysed by *duration* of visit, it is apparent that there were significant increases from 2018 to 2020 for those visiting *just for the day* and for *multiple nights* in the proportion indicating that their NPWS park visit was their *only reason* for visiting, but not so for those who stayed *overnight* (See Chart 104). Mean scores were significantly higher in 2020 than was the case in 2018 for those visiting *just for the day* (70.0% - 2018; 74.4% - 2020)/

Chart 104: Role of NPWS Park Visit in Trip Decision by Duration of Visit



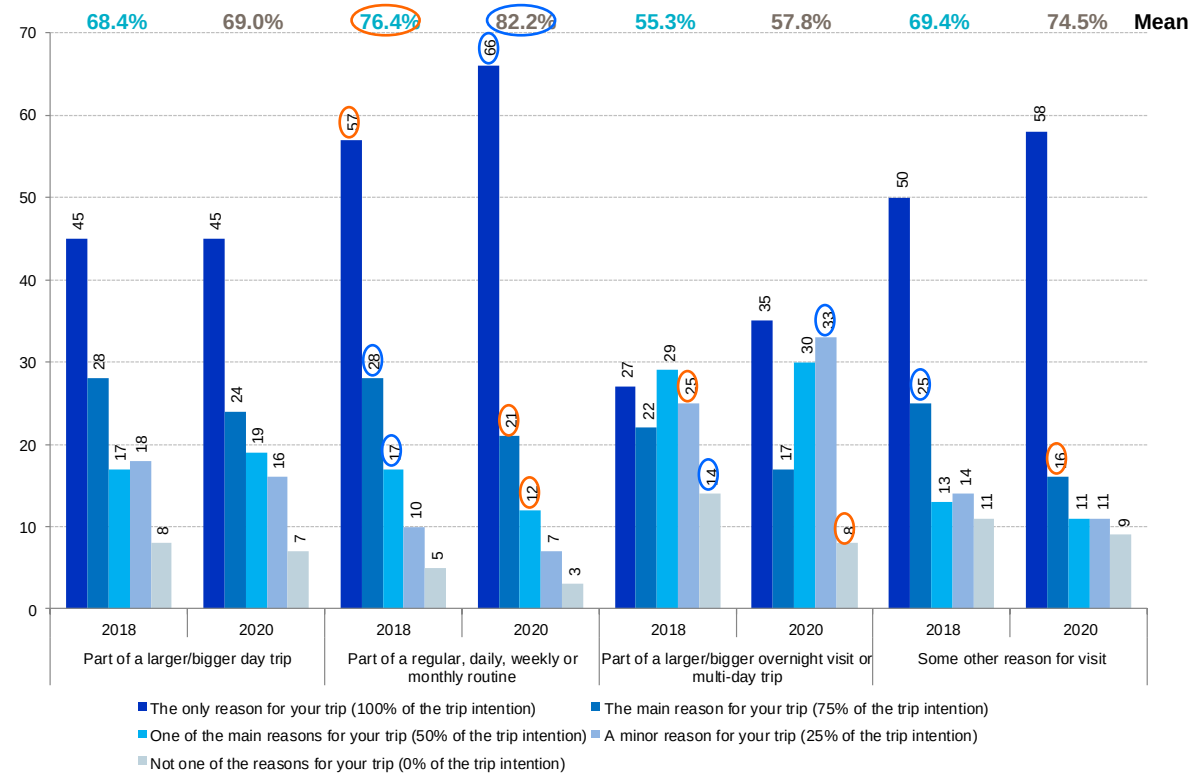
Source: NPWS Parks Visitor Surveys 2018-2020
Base: 2018 n=1,741; 2020 n= 1,220

Significantly higher
Significantly lower

Patterns for the role of each trip did not vary markedly by *type* of visit. Results for those visiting as *part of a larger/bigger day trip*, as *part of a regular daily, weekly or monthly routine* and for *some other reason* in both 2018 and 2020 are virtually identical (Chart 105). Only the results for those visiting as *part of a larger/bigger overnight visit or multi-day trip* differs slightly between surveys.

A significantly higher proportion of those visiting NPWS parks as *part of a regular daily, weekly or monthly routine* in 2020 than 2018 claimed that the visit to the park was the *only reason for their trip* (66% and 57% respectively). Similarly the mean score for those claiming that the visit was the *only reason for their trip* was significantly higher in 2020 than in 2018 (82.2% and 76.4% respectively).

Chart 105: Role of NPWS Park Visit in Trip Decision by Type of Visit



Source: NPWS Parks Visitor Surveys 2018-2020
Base: 2018 n=1,741; 2020 b=1,220

Significantly higher
Significantly lower

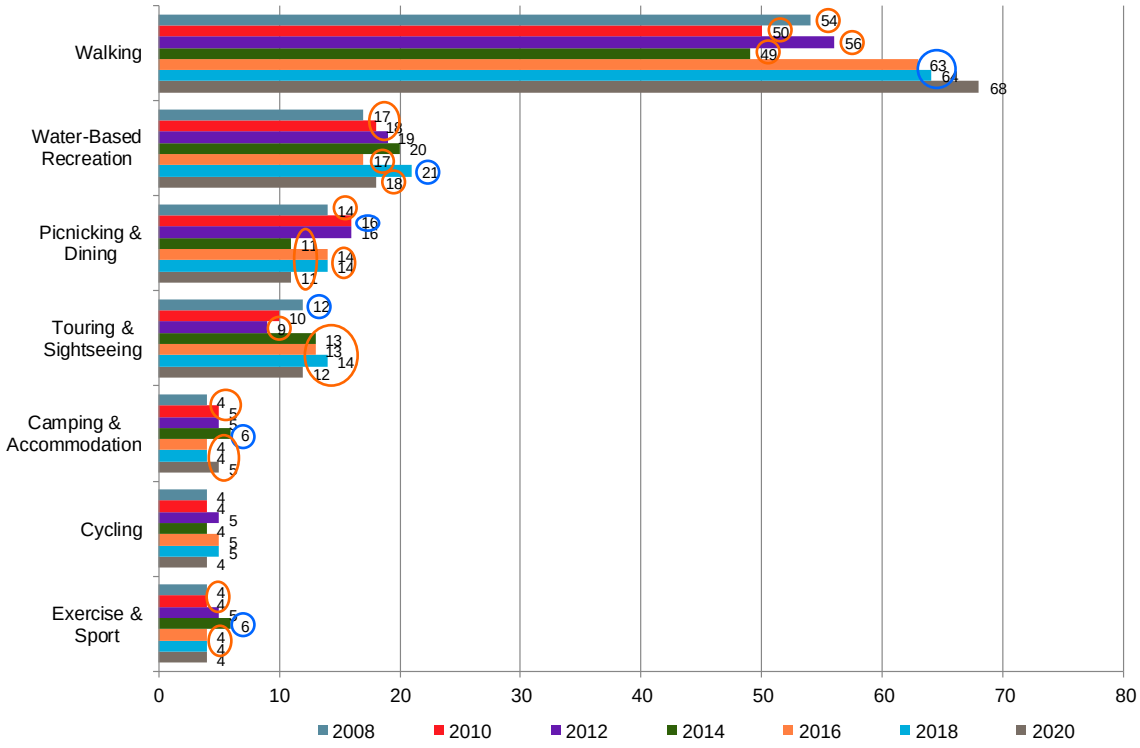
8.7 Activities Undertaken at Most Recently Visited Park

Respondents who had visited a NPWS park were asked what activities they undertook on their *most recent* visit. Almost all of those who visited a NPWS park undertook some sort of 'activity', with 99% nominating a specific activity in each of the years from 2008 to 2020.

The detailed list of activities was grouped into broader categories for analysis (see Chart 106). The most commonly named activity group undertaken at NPWS parks was *walking*, undertaken by a high 68% of people in 2020. This was followed by *water-based recreation*, (18%), *picnicking and dining*, (11%) and *touring and sightseeing* (12%). All other activities were nominated by 5% or fewer visitors in 2020 (see Chart 107).

Chart 106:

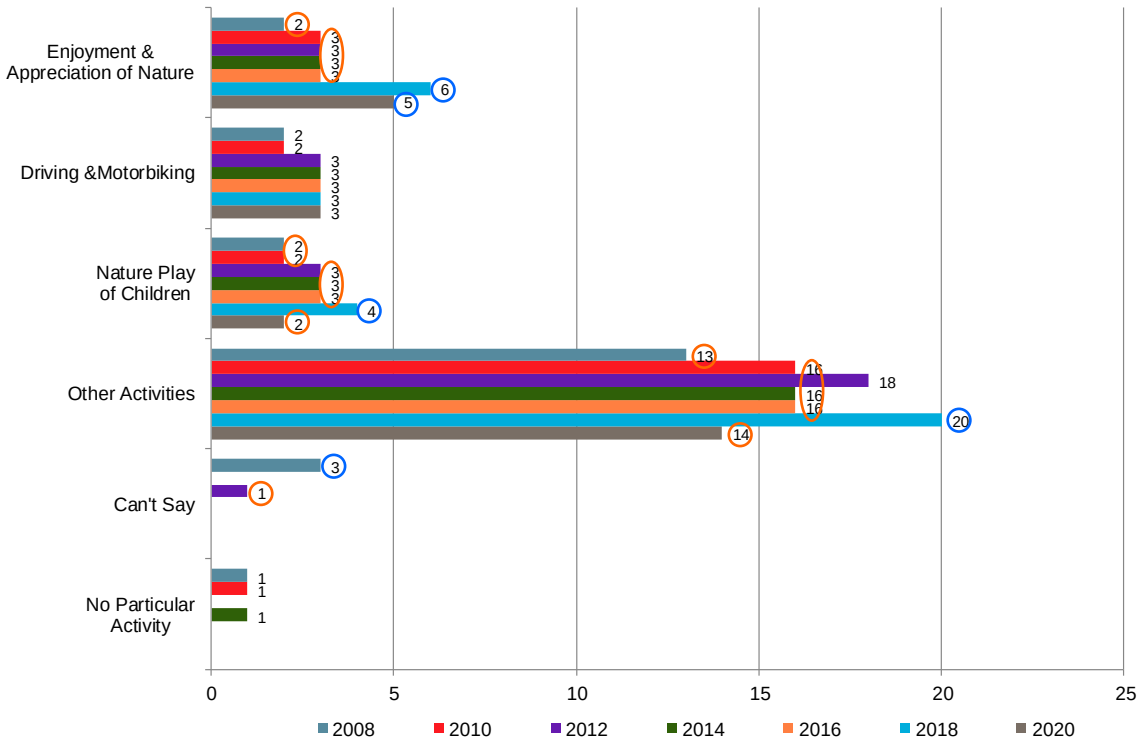
Main Activities Undertaken on Most Recent Visit to a NSW Park



Source: NPWS Parks Visitor Surveys – Most recently visits NPWS park 2008–2020
Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582, 2018 n=1,614; 2020 n=1,117

Significantly lower
Significantly higher

Chart 107: Other Activities Undertaken on Most Recent Visit to a NSW Park



Source: NPWS Parks Visitor Surveys – Most recently visits NPWS park 2008–2020

Significantly lower

Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582, 2018 n=1,614; 2020 n=1,117 Significantly higher

Table 25 lists the four most commonly nominated activities undertaken by visitors on their most recent visit to a NPWS park. Within these, a breakdown of the specific activities has been allocated to each of the four overarching categories. Comparisons have been made for all survey years.

Incidence of *walking* significantly increased from 2014 levels in 2016 and 2018, and attained its highest level of 2020 of 68% (though this proportion is not significantly higher than 2016 or 2018 results). The increase in walking activities over time is almost entirely due to the significant increase in the proportion nominating *walking/bushwalking* since 2014.

Incidence of *water-based recreation* declined to 18% in 2020 from the peak attained in 2018 (21%). The main sub category contributing to this activity was the proportion of visitors *swimming* (11% in 2020) and, *fishing* (4%).

The decline in the proportion of visitors *picnicking and dining* in 2020 from the 2016 and 2018 proportions is directly related to the decline in visitors having *picnics and barbecues*. The fall in the proportion *touring and sightseeing* in 2020 can be attributed to the significant decline in the proportion undertaking *sightseeing* (8%), most likely due to COVID-19 restrictions impacting on such activities, though the proportion undertaking *scenic driving* significantly increased in 2020.

Table 25: Most Commonly Activity Undertaken at Most Recently Visited NPWS Park in Last 4 Weeks

Activities undertaken on one's most recent visit to a PWG park		Most recent visit to a PWG park in the last 4 weeks						
		2008	2010	2012	2014	2016	2018	2020
ACTIVITY - SUMMARY		**n=1,487**	**n=1,341**	**n=1,341**	**n=1,555**	**n=1,582**	**n=1,614**	**n=1,117**
Walking	Orienteering And Rogaining	*	*	*	*	*	*	-
	Walking The Dog	2%	1%	1%	1%	1%	2%	1%
	Walking/ Bushw alking	52%	49%	55%	48%	63%	62%	67%
Walking Total		**54%**	**50%**	**56%**	**49%**	**63%**	**64%**	**68%**
Water-Based Recreation	Fishing	4%	6%	6%	5%	4%	5%	4%
	Motor Boating/ Parasailing	1%	1%	1%	1%	1%	*	*
	Row ing/ Rafting/ Canoeing/ Kayaking	1%	1%	1%	3%	1%	3%	1%
	Sailing/ Kite Surfing/ Sail Boarding	1%	*	1%	*	1%	1%	*
	Scuba Diving/ Snorkelling	*	1%	*	1	*	*	*
	Surfing	2%	2%	2%	2%	2%	2%	2%
	Sw imming	8%	9%	10%	10%	11%	13%	11%
	Waterskiing	*	*	*	*	1%	*	*
	Other Water-Based Recreation	-	-	-	-	-	-	1%
Water-Based Recreation Total		**17%**	**18%**	**19%**	**20%**	**17%**	**21%**	**18%**
Picnicking And Dining	Dining/ Eating At Food Outlets	2%	2%	3%	3%	2%	2%	2%
	Picnicking And Barbecues	11%	15%	13%	8%	12%	11%	9%
Picnicking And Dining Total		**14%**	**16%**	**16%**	**11%**	**14%**	**14%**	**11%**
Touring And Sightseeing	Holiday/ Break Aw ay/ Weekend Trip	*	1%	*	1%	*	*	*
	Lookouts And Scenery	2%	2%	1%	3%	1%	3%	3%
	Scenic Driving	3%	2%	1%	3%	1%	2%	3%
	Sightseeing	7%	6%	7%	9%	11%	10%	8%
Touring And Sightseeing Total		**12%**	**10%**	**9%**	**13%**	**13%**	**14%**	**12%**

* Less than 0.5% response
Source: NPWS Parks Visitor Surveys – Most recently visits NPWS park 2008– 2020 Significantly lower

Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582, 2018 n=1,614; 2020 n=1,117 Significantly higher

Table 26 shows that the proportion of park visitors undertaking *walking* activities in 2020 increased significantly across all states of origin, with the exception of Victoria, wherein it declined from the 2018 high of 72% to 36%. The proportions undertaking *water-based recreation* and/or *picnicking and dining* activities increased significantly for VIC residents, but significantly declined for those from NSW. *Touring and sightseeing* activities in 2020 increased significantly for those from ACT.

Table 26: Main Activities Undertaken at Most Recently Visited NPWS Park by State of Origin

Main Activities	NSW							VIC						
	2008 n= 1,113	2010 n= 1,019	2012 n= 1,023	2014 n= 1,211	2016 n= 1,212	2018 n= 1,237	2020 n= 916	2008 n= 49	2010 n= 36	2012 n= 49	2014 n= 47	2016 n= 61	2018 n= 64	2020 n= 28
Walking	53%	50%	55%	49%	64%	64%	69%	54%	45%	63%	45%	48%	72%	36%
Water-Based Recreation	18%	18%	19%	20%	17%	21%	17%	14%	19%	22%	12%	25%	22%	31%
Picnicking And Dining	14%	18%	16%	11%	14%	14%	11%	5%	6%	8%	8%	16%	7%	21%
Touring And Sightseeing	12%	10%	8%	13%	12%	14%	11%	20%	11%	19%	26%	22%	23%	12%
Main Activities	**ACT**							**SE QLD**						
	2008 n= 208	2010 n= 189	2012 n= 202	2014 n= 212	2016 n= 199	2018 n= 208	2020 n= 131	2008 n= 117	2010 n= 97	2012 n= 83	2014 n= 85	2016 n= 85	2018 n= 105	2018 n= 42
Walking	52%	60%	52%	50%	67%	58%	68%	59%	52%	54%	49%	70%	58%	73%
Water-Based Recreation	12%	21%	17%	18%	26%	23%	18%	14%	25%	23%	23%	13%	18%	15%
Picnicking And Dining	7%	11%	6%	8%	6%	13%	13%	14%	7%	13%	14%	9%	12%	7%
Touring And Sightseeing	13%	12%	9%	12%	12%	17%	22%	13%	14%	12%	9%	16%	12%	14%

Source: NPWS Parks Visitor Surveys – Most recently visits NPWS park 2008–2020 Significantly lower
Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582, 2018 n=1,614; 2020 n= 1,117 Significantly higher

As can be seen in Table 27, people of all ages in 2020 were significantly more likely to undertake *walking* activities than in previous years.

Significant declines in the proportion of NPWS park visitors undertaking *water-based recreation* activities in 2020 were observed for Males aged 18-24 years (from 33% in 2018 to 15% in 2020) and females aged 50 years and over (from 18% in 2018 to 9% in 2020.

Significant declines from 2018 to 2020 in the proportions undertaking *picnicking and dining* were observed for males aged 18-24 years, 35-39 years and 50 years and over and for females aged 25-34 years.

The decrease in the proportion *touring and sightseeing* in 2020 can be attributed to significant declines in males aged 35-49 years, females aged 18-24,years and 50 years and over.

Table 27: Main Activities Undertaken at Most Recently Visited NPWS Park by Age by Sex

Activity	Sex by Age	2008	2010	2012	2014	2016	2018	2020
Walking	Male 18-24 yrs	33%	32%	49%	32%	54%	56%	65%
	Male 25-34 yrs	42%	39%	40%	38%	54%	66%	64%
	Male 35-49 yrs	57%	47%	49%	38%	56%	56%	53%
	Male 50+ yrs	53%	47%	61%	48%	59%	57%	61%
	Female 18-24 yrs	52%	47%	64%	51%	76%	67%	80%
	Female 25-34 yrs	48%	64%	49%	58%	68%	76%	76%
	Female 35-49 yrs	56%	57%	63%	57%	70%	65%	74%
	Female 50+ yrs	68%	59%	63%	59%	75%	68%	77%
Water-Based Recreation	Male 18-24 yrs	29%	28%	19%	26%	12%	33%	15%
	Male 25-34 yrs	19%	27%	16%	29%	19%	24%	23%
	Male 35-49 yrs	22%	22%	24%	23%	23%	25%	19%
	Male 50+ yrs	12%	14%	18%	18%	15%	18%	19%
	Female 18-24 yrs	15%	18%	25%	19%	27%	21%	22%
	Female 25-34 yrs	15%	13%	17%	22%	11%	19%	18%
	Female 35-49 yrs	21%	20%	23%	17%	18%	20%	18%
	Female 50+ yrs	11%	11%	14%	13%	14%	18%	9%
Picnicking And Dining	Male 18-24 yrs	12%	21%	12%	18%	14%	11%	7%
	Male 25-34 yrs	14%	15%	10%	10%	14%	9%	8%
	Male 35-49 yrs	10%	14%	17%	9%	13%	11%	9%
	Male 50+ yrs	12%	15%	12%	8%	12%	13%	8%
	Female 18-24 yrs	20%	21%	14%	15%	13%	15%	18%
	Female 25-34 yrs	18%	17%	29%	10%	20%	16%	9%
	Female 35-49 yrs	16%	19%	13%	10%	15%	13%	17%
	Female 50+ yrs	13%	16%	18%	14%	13%	18%	14%
Touring And Sight-seeing	Male 18-24 yrs	10%	5%	6%	8%	18%	9%	12%
	Male 25-34 yrs	9%	12%	9%	11%	12%	11%	10%
	Male 35-49 yrs	8%	7%	8%	11%	13%	19%	12%
	Male 50+ yrs	21%	16%	9%	16%	15%	19%	16%
	Female 18-24 yrs	18%	17%	*	14%	7%	13%	8%
	Female 25-34 yrs	10%	5%	6%	8%	10%	8%	11%
	Female 35-49 yrs	8%	6%	6%	14%	10%	13%	10%
	Female 50+ yrs	12%	11%	16%	17%	15%	14%	10%

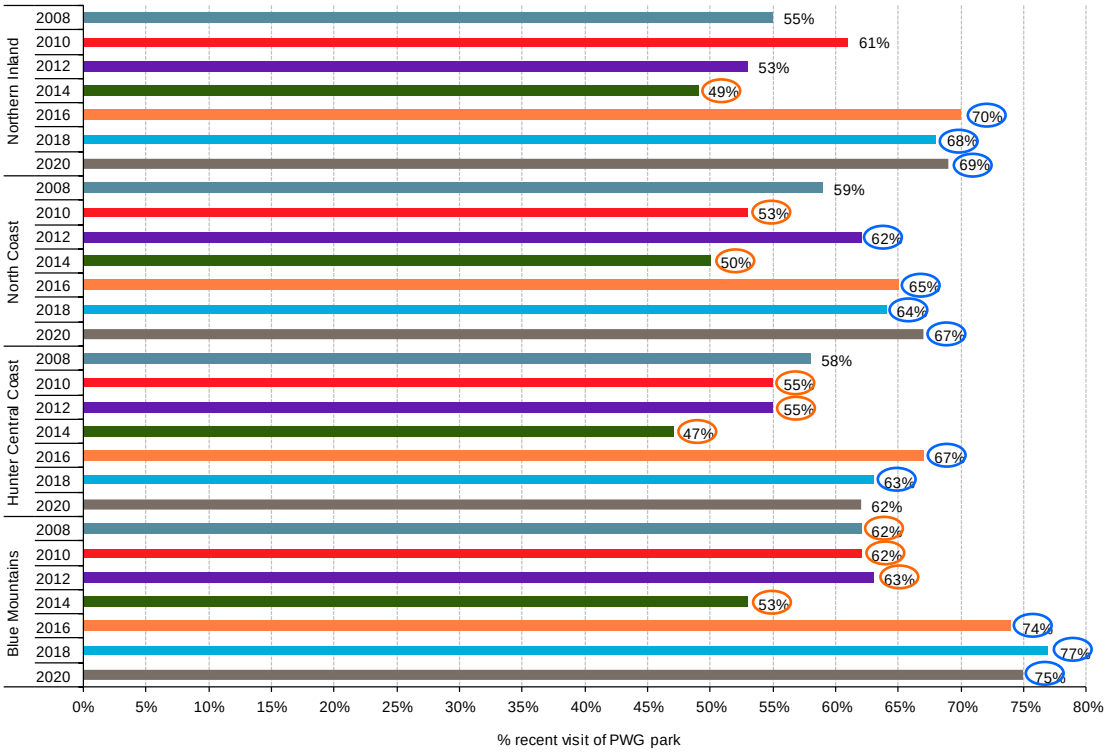
Source: NPWS Parks Visitor Surveys – Most recently visits NPWS park 2008–2020
Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582, 2018 n=1,614; 2020 n=1,117

Significantly lower
Significantly higher

Analysis of *walking* activities undertaken at one's most recently visited NPWS Park by Branch (Charts 108 and 109) shows that the highest incidences were recorded for the Southern Ranges (49%), North Coast (67%), Greater Sydney (70%) and South Coast Branches (73%) in 2020, with the Greater Sydney Branch recording a significantly higher incidence than in all other years, most likely the result of COVID-19 regulations relating to exercise impacting positively on walking.

Chart 110 and Chart 111 show that incidence of *water-based recreation* activities was significantly higher for the North Coast Branch in 2020 (34%). South Coast (21%) and Greater Sydney (15%) Other Branches recorded their lowest ever incidence of undertaking *water-based activities* in 2020, most likely to Bushfires and COVID-19 restrictions limiting access to parks and these activities..

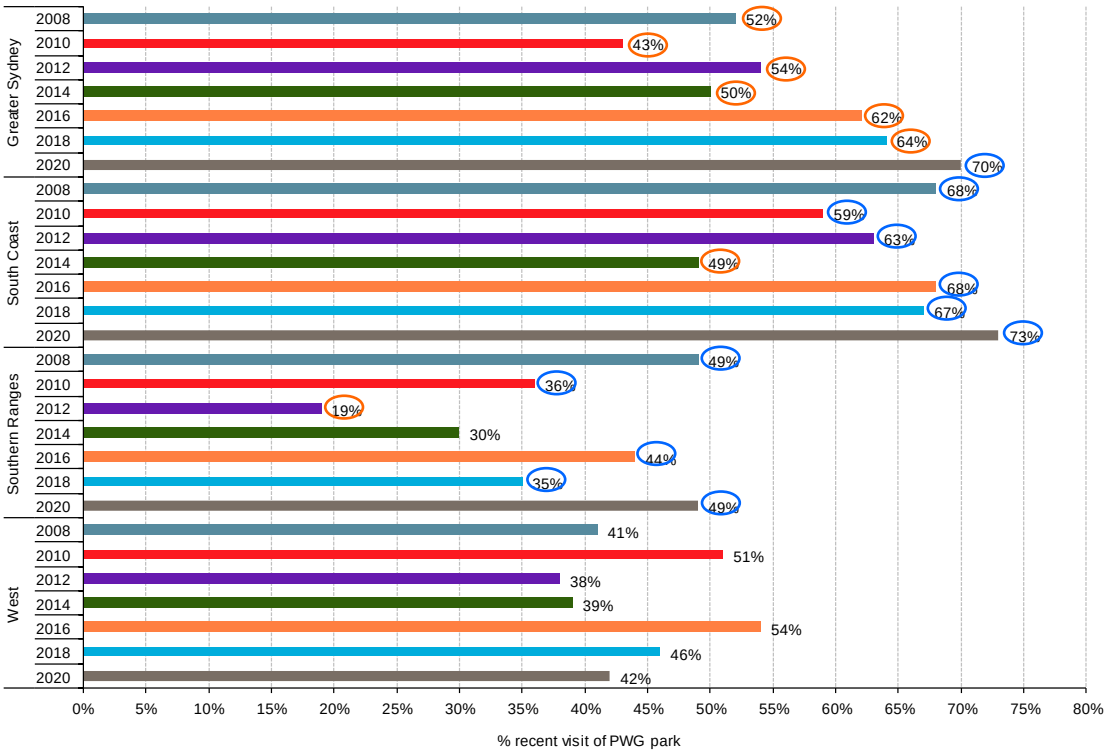
Chart 108: Walking Activities at Most Recently Visited NPWS Park by NPWS Branch (Pt 1)



Source: NPWS Parks Visitor Surveys – Most recent visit to a NPWS park 2008–2020
Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582; 2018 n=1,614; 2020 n=1,017

Significantly lower
Significantly higher

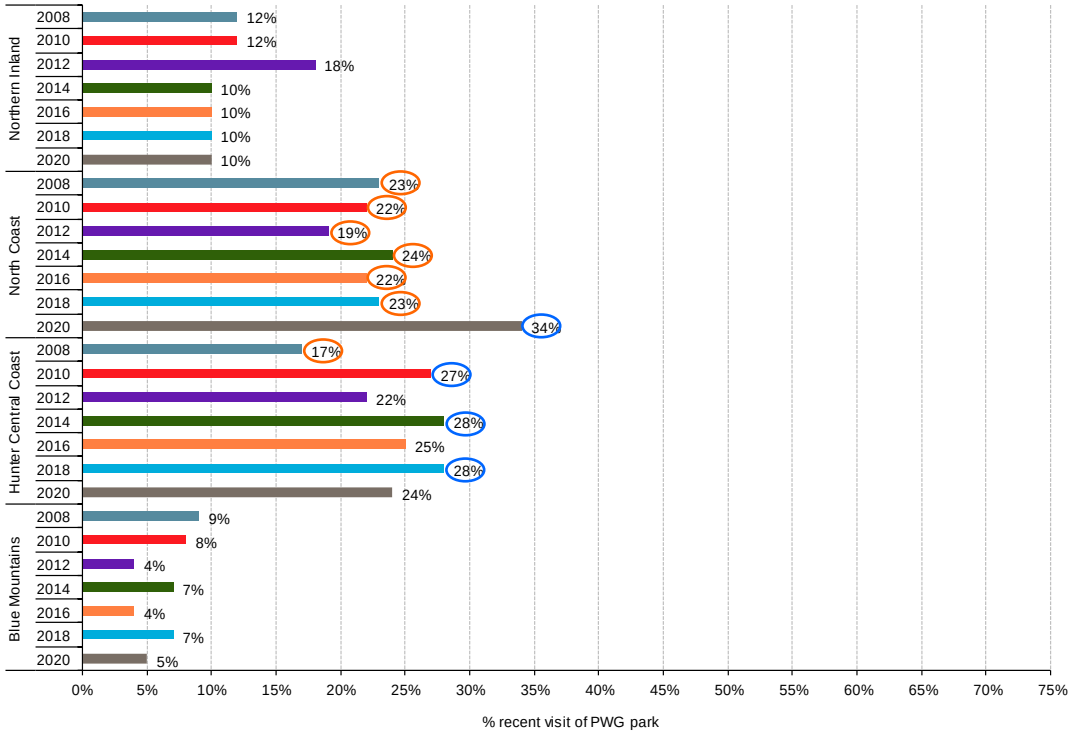
Chart 109: Walking Activities at Most Recently Visited NPWS Park by NPWS Branch (Pt 2)



Source: NPWS Parks Visitor Surveys – Most recent visit to a NPWS park 2008–2020
Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582; 2018 n=1,614; 2020 n=1,017

Significantly lower
Significantly higher

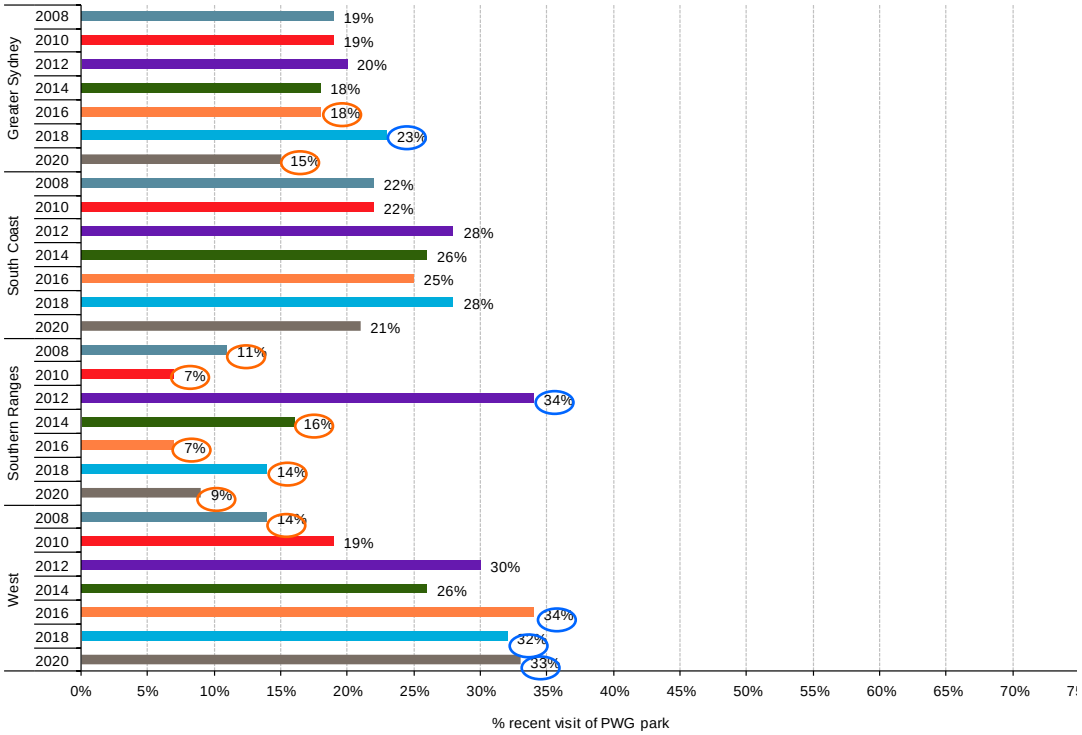
Chart 110: Water-Based Recreation Activities at Most Recently Visited NPWS Park by NPWS Branch (Pt 1)



Source: NPWS Parks Visitor Surveys – Most recent visit to a NPWS park 2008–2020
Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582; 2018 n=1,614; 2020 n=1,017

Significantly lower
Significantly higher

Chart 112: Water-Based Recreation Activities at Most Recently Visited NPWS Park by NPWS Branch (Pt 2)



Source: NPWS Parks Visitor Surveys – Most recent visit to a NPWS park 2008–2020
Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582; 2018 n=1,614; 2020 n=1,017

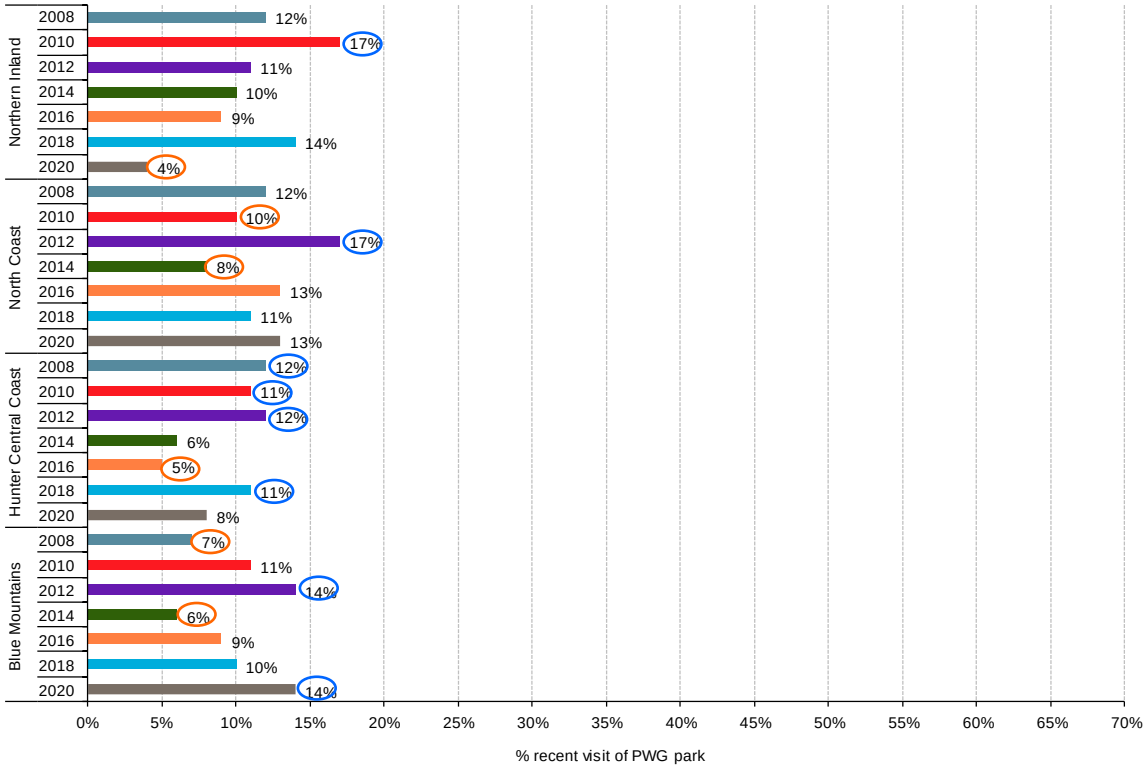
Significantly lower
Significantly higher

Incidence of undertaking *picnicking and dining* activities was significantly low for the Greater Sydney Branch in 2020 (13%). It has averaged around 21% incidence from 2008 to 2018 (Chart 113). A significant fall was also evident for the Northern Inland Branch, with just 4% undertaking *picnicking and dining* activities in 2020 (Chart 114). However, the highest incidence of *picnicking and dining* since 2014 was observed for the Blue Mountains Branch at 14%.

Chart 115 shows that *touring and sightseeing* activities were the equal highest recorded in 2020 for the Blue Mountains Branch (23%), but the equal lowest recorded for the Northern Inland Branch (10%). *Touring and sightseeing* activities were the equal lowest recorded in 2020 for the West Branch (11% - Chart 116), significantly lower than the 30% recorded in 2018 for this Branch, most likely to COVID-19 border restrictions limiting access to parks in this Branch.

Sample sizes are generally too small to analyse other activities over time at the NPWS Branch level. However, for the Southern Ranges Branch, incidence of undertaking *snow sports* is of interest. In 2020 three in ten of those on their most recent visit to a NPWS park undertook snow sports (31%), significantly lower than the peak observed in 2018, most likely due to COVID-19 restrictions limiting access to snowfields over winter (45%) (See Chart 117).

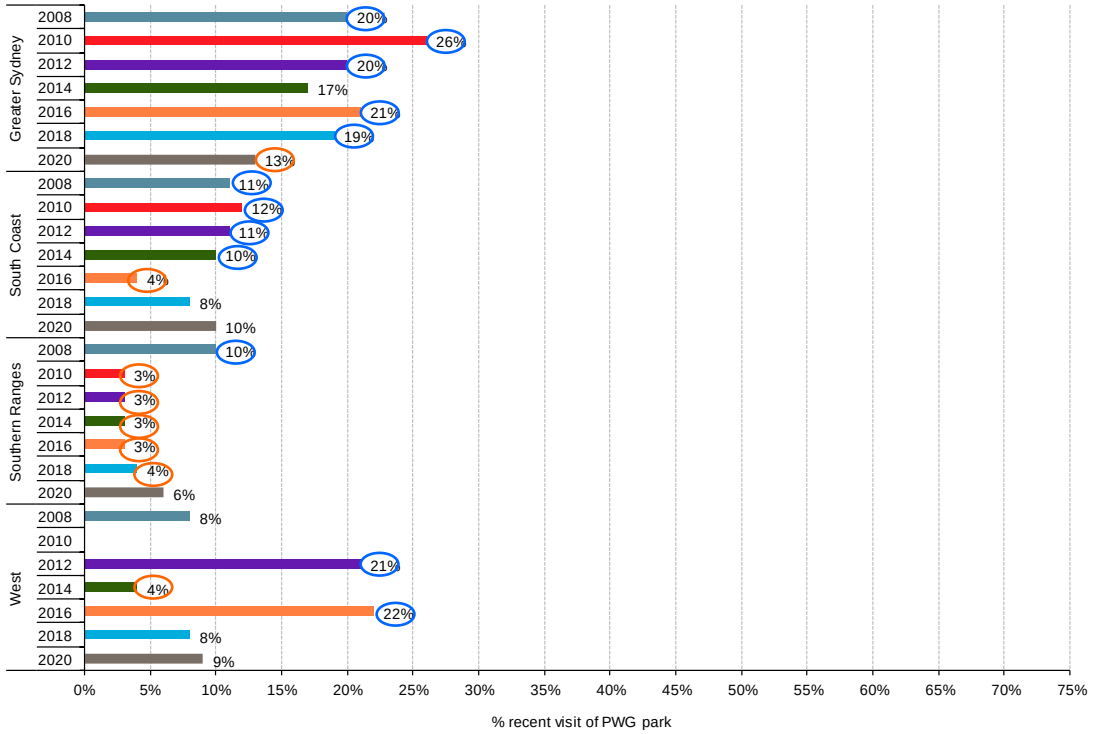
Chart 113: Picnicking and Dining Activities at Most Recently Visited NPWS Park by NPWS Branch (Pt 1)



Source: NPWS Parks Visitor Surveys – Most recent visit to a NPWS park 2008–2020
Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582; 2018 n=1,614; 2020 n=1,017

Significantly lower
Significantly higher

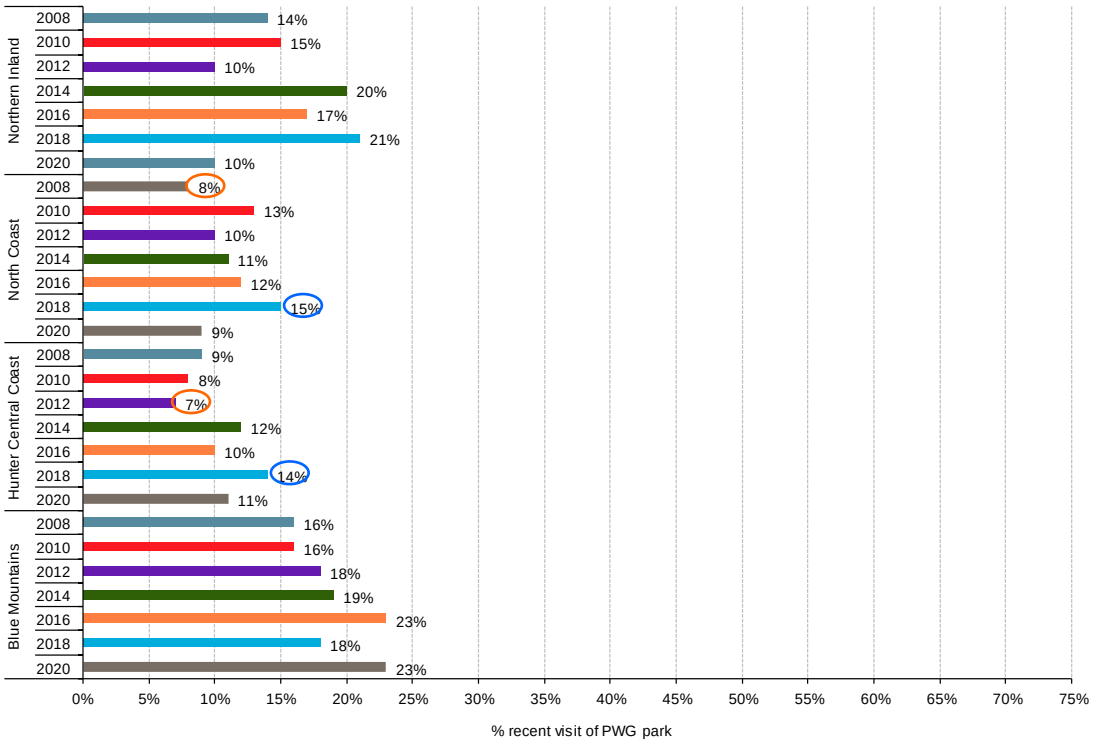
Chart 114: Picnicking and Dining Activities at Most Recently Visited NPWS Park by NPWS Branch (Pt 2)



Source: NPWS Parks Visitor Surveys – Most recent visit to a NPWS park 2008–2020
Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582; 2018 n=1,614; 2020 n=1,017

Significantly lower
Significantly higher

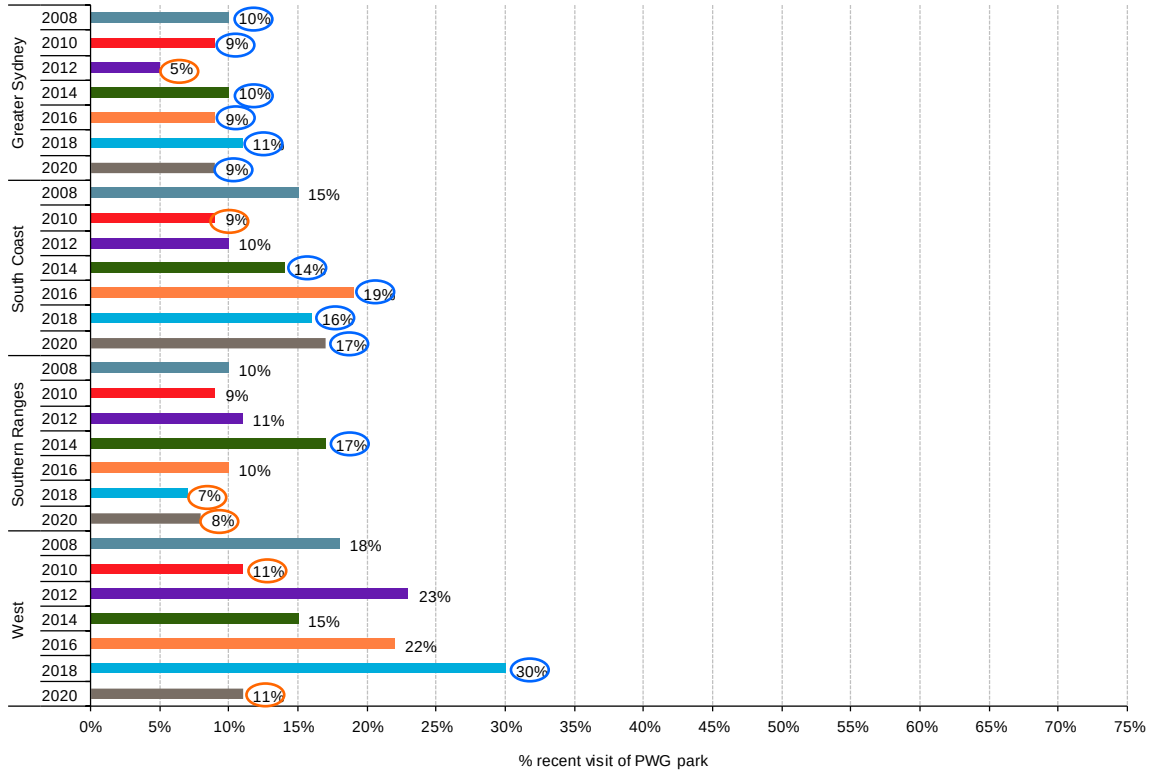
Chart 115: Touring and Sightseeing Activities at Most Recently Visited NPWS Park by NPWS Branch (Pt 1)



Source: NPWS Parks Visitor Surveys – Most recent visit to a NPWS park 2008–2020
Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582; 2018 n=1,614; 2020 n=1,017

Significantly lower
Significantly higher

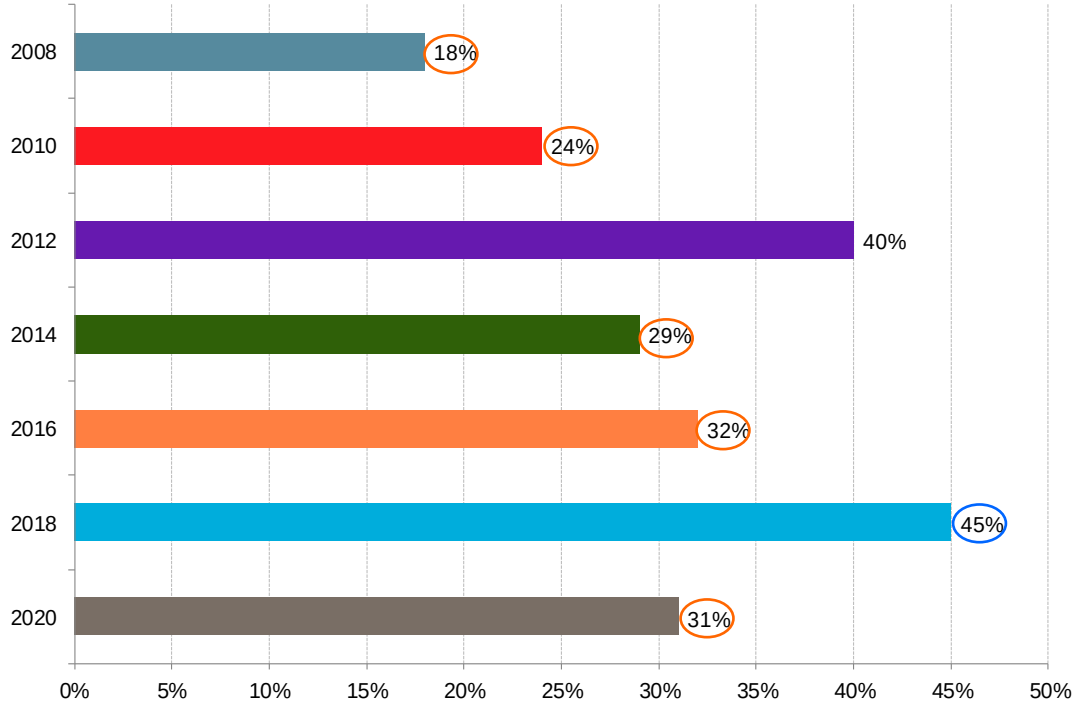
Chart 116: Touring and Sightseeing Activities at Most Recently Visited NPWS Park by NPWS Branch (Pt 2)



Source: NPWS Parks Visitor Surveys – Most recent visit to a NPWS park 2008–2020
Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582; 2018 n=1,614; 2020 n=1,017

Significantly lower
Significantly higher

Chart 117: Snow Sports at Recently Visited Park in the Southern Ranges Branch

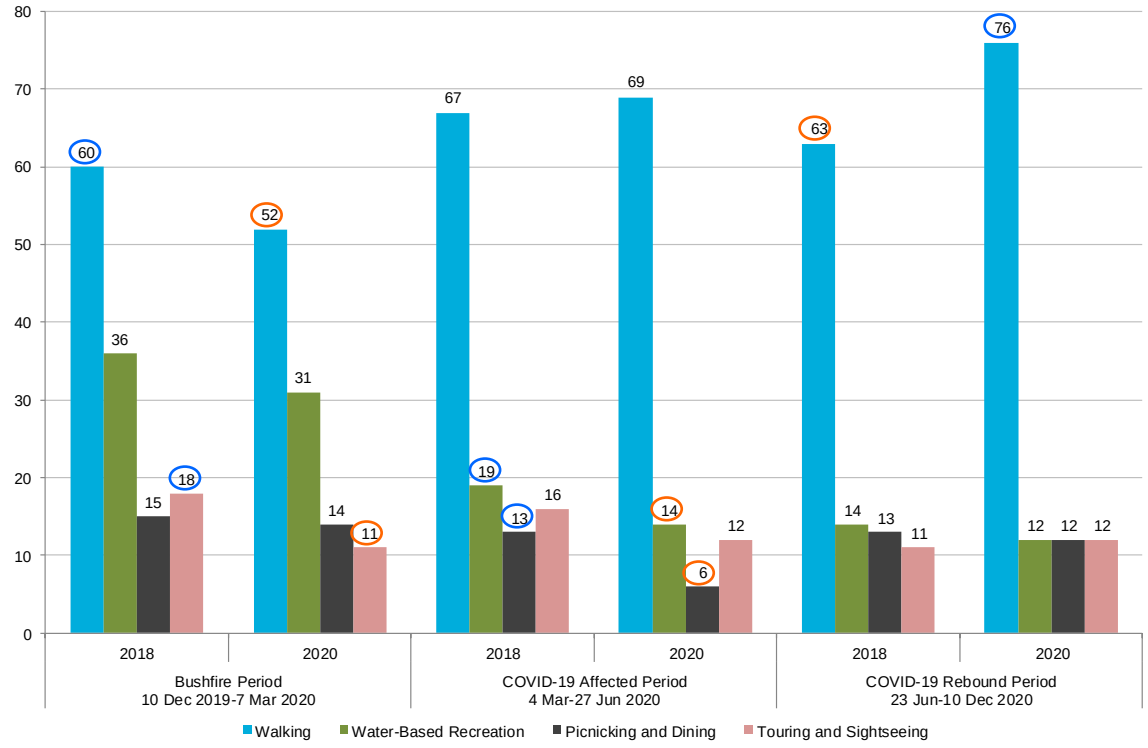


Source: NPWS Parks Visitor Surveys – Most recently visits NPWS park in Southern Ranges Branch 2008–2018
Base: 2008 n=199; 2010 n=128; 2012 n=131; 2014 n=152; 2016 n=165, 2018 n=155; 2020 n=91

Significantly lower
Significantly higher

When the four major activities were analysed by COVD-19/Bushfire periods a significant decline in *walking* activities was evident between 2018 and 2020 in the Bushfire period. The decline was not evident in the COVID-19 Affected period. Incidence of *walking* activities was significantly higher than in 2018 for the COVID-19 Rebound period (see Chart 118). There was a significant decline *in touring and sightseeing* activities from 2018 to 2020 during the Bushfire period. Significant declines for 2018 to 2020 in incidence of both *water-based activities* and *picnicking and dining activities* were also identified. during the COVID-19 Affected period.

Chart 118: Major Activities at Recently Visited Park for COVID-19/Bushfire Periods



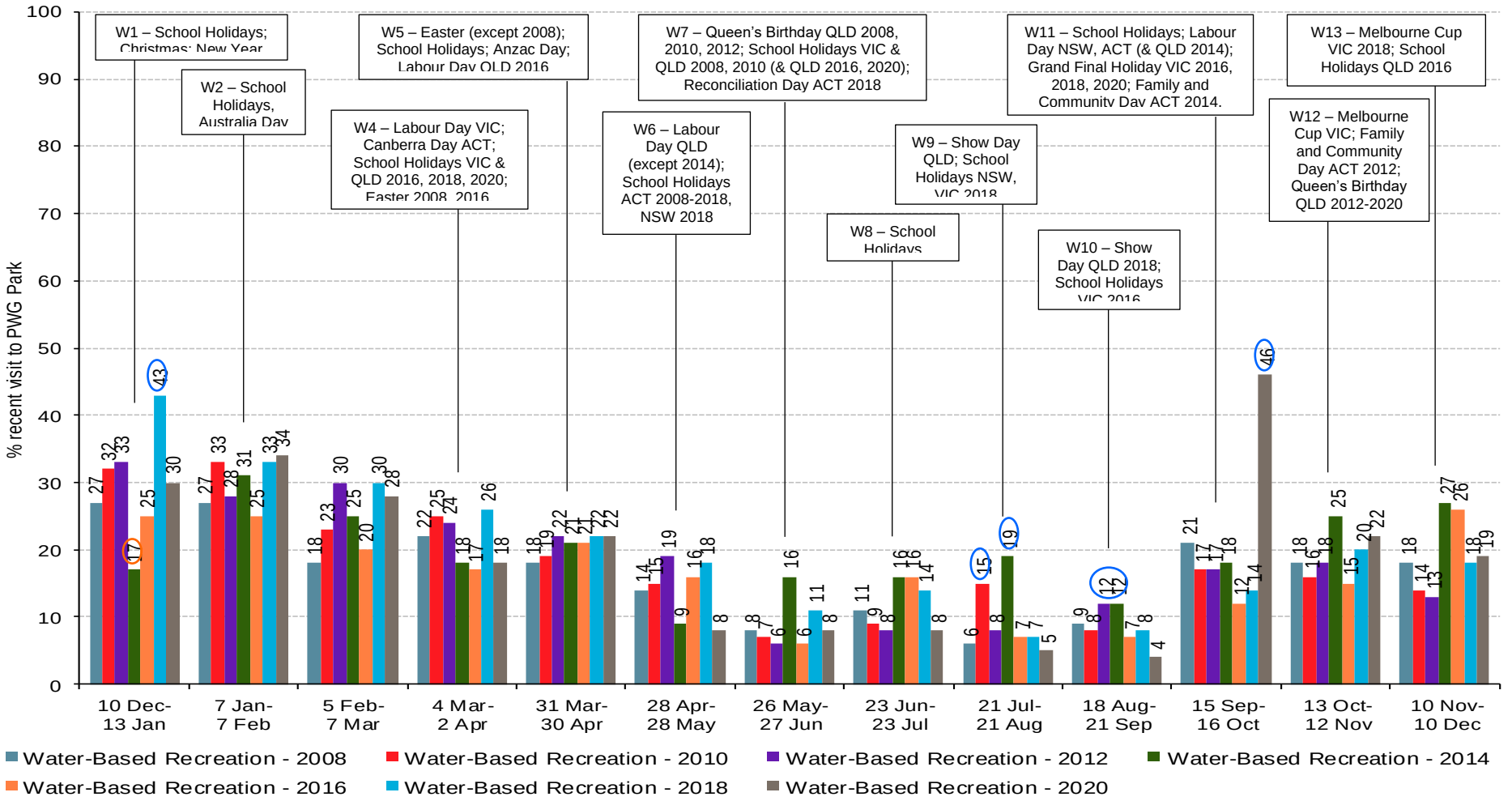
Source: NPWS Parks Visitor Surveys – Most recent visit to a NPWS park 2018–2020
Base: 2018 n=1,614; 2020 n=1,017

Significantly lower
Significantly higher

When *walking, water-based recreation, picnicking and dining* and *touring and sightseeing* activities are analysed by survey wave, only *water-based activities* exhibit any noteworthy trends. The other three activities are relatively stable across the calendar year. Participation in water-based activities tends to be very high during the summer school holidays (waves 1-2 – December-January – around 29.9% on average) and high during February to April (waves 3-5 – Easter and school holidays - around 22.3% on average), then declines to very low proportions from wave 6 to wave 10 (late-April to mid-September – around 10.6% on average) and then rises to average levels in waves 11 and 13 (Mid-September-early-December – around 19.7%). This is not surprising with water-based activities likely to be more commonplace during the summer months and less common in the winter months (See Chart 119).

In 2020 incidence of *water-based activities* was high from December 2019 to early March 2020, being significantly high in wave 2 (34% - January) and again in wave 11 (46% - mid-September-mid-October. Incidence of undertaking *water-based activities* was significantly low in waves 9 and 10 (mid-July-mid-September – 5% and 4% respectively).

Chart 119: Water-Based Recreation Activities Undertaken at Most Recently Visited NPWS Park by Wave



Source: NPWS Parks Visitor Surveys – Most recent visit to a NPWS park 2008–2020
Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582; 2018 n=1,614; 2020 n=1,017

Significantly lower than 2020 estimate
Significantly higher than 2020 estimate

Chart 120 shows that *walking* was equally prevalent for *day trips* and *overnight trips* in 2018 (each 64%), but while still high for *overnight trips* in 2020 (65%), *walking* was significantly higher for *day trips* in 2020 (69%). *Walking* was less common for park visits of *multiple nights* (55% - 2018; 52% - 2020), indicating that a major motivator for taking a day trip or overnight trip to an NPWS park is to walk, but it is less of a motivator for visits on longer trips.

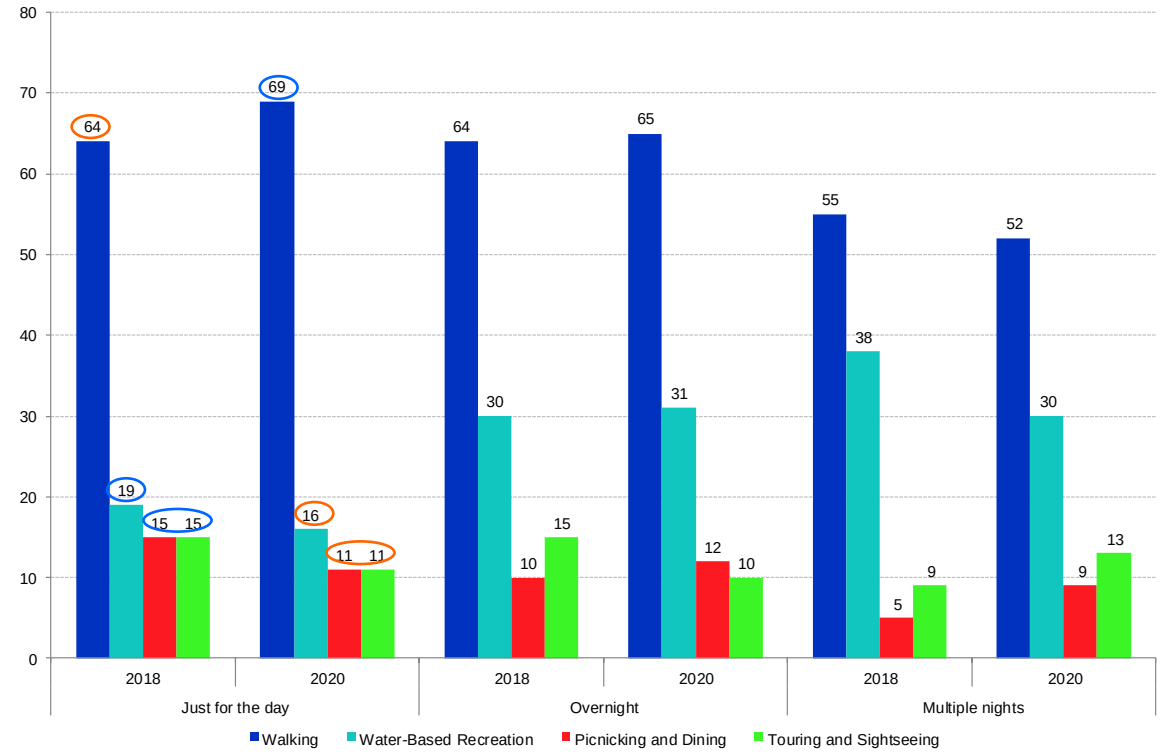
There was a potential trend noted in 2018 that the longer the duration of the trip to a NPWS park the more likely one was to undertake *water-based recreation* activities as part of that visit. This trend was not however, as evident in 2020. Undertaking *water-based recreation* in the context of *just for the day* trips was significantly lower in 2020 than in 2018 (16% c.f.19%).

In 2018 a trend was noted for *picnicking and dining* activities, to be undertaken in greater proportions in the context of *day trips* to NPWS parks than on visits of *multiple nights*, suggesting that a motivator for shorter park visits is a picnicking and dining experience. This trend was not however, as evident in 2020, with the proportion undertaking *picnicking and dining activities* during *day trips* in 2020 being significantly lower than in 2018 (11% c.f. 15%).

No clear trend was evident for *Touring and sightseeing* across 2018 and 2020. Incidence of undertaking touring and sightseeing just for the day was significantly lower in 2020 than in 2018 (11% c.f. 15%).

Not surprisingly, *snow sports* are significantly higher among those visiting an NPWS park as part of a multiple night trip-day trip (11% - 2018; 12% - 2020) than shorter trips (2% - 2018; 1% - 2020) - not shown on chart).

Chart 120: Main Activities at Most Recently Visited NPWS Park by Duration of Trip



Source: NPWS Parks Visitor Surveys 2018-2020
Base: 2018 n=1,614; 2020 n=1,117

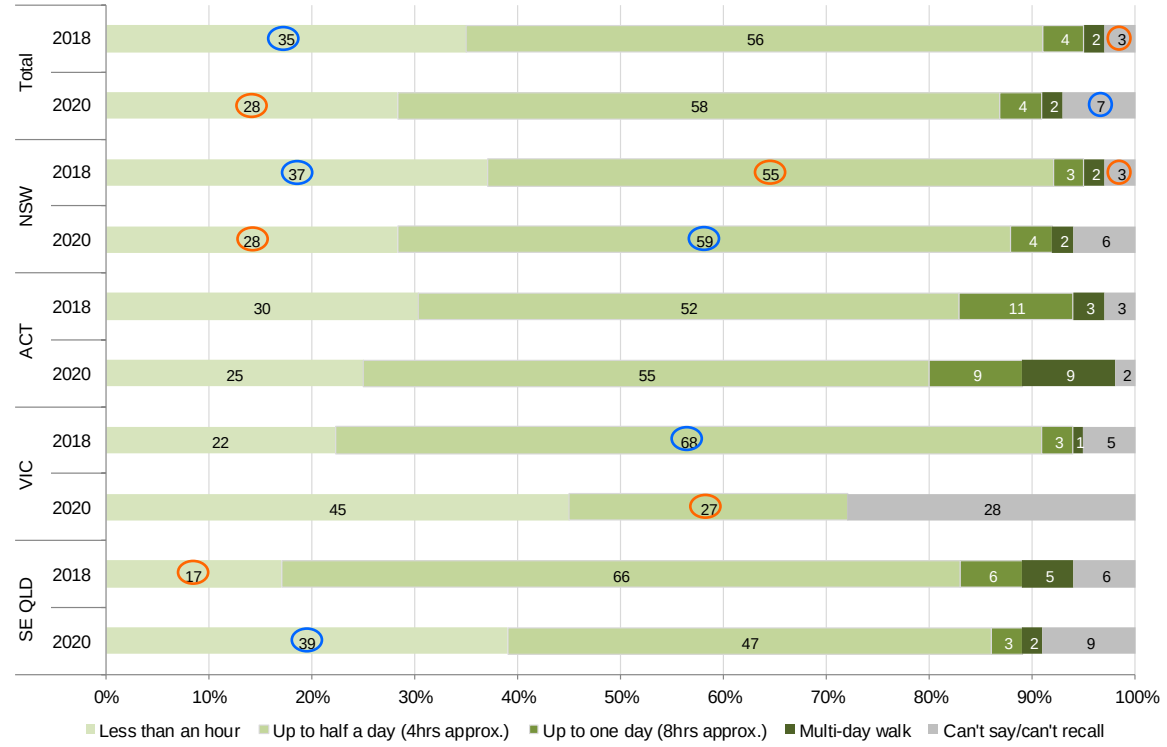
Significantly lower
Significantly higher

In 2018 and 2020 a new question was asked of those people who had undertaken walking, bushwalking or walking the dog on their most recent visit to a NPWS park.

> *For how long did you [walk or bushwalk / walk the dog] on this visit? Less than an hour; up to half a day; up to one day; a multi-day walk*

On average, NPWS visitors tended to walk for a slightly longer time in 2020 than in 2018, with, just over one quarter walking for *less than an hour* (28%), significantly lower than the just over one third walked for this length of time in 2018 (35%). In both 2018 and 2020 more than half walked for *up to half a day* (approximately 4 hours – 56% - 2018; 58% - 2018 - Chart 121). When analysed by region of origin, walk length was slightly longer in 2020 than in 2018 amongst NSW residents, with walks of *less than an hour* significantly lower (28% c.f. 37%) and walks of *up to half a day* significantly higher (59% c.f. 55%). Conversely, walk length was shorter in 2020 than in 2018 for visitors from Victoria and Southern QLD with the proportion of Victorians walking for *up to half a day* significantly lower in 2020 than in 2018 (27% and 68% respectively) and the proportion of southern Queenslanders walking for *less than an hour* significantly higher in 2020 than in 2018 (39% c.f. 17%).

Chart 121: Length of Walk by State of Origin



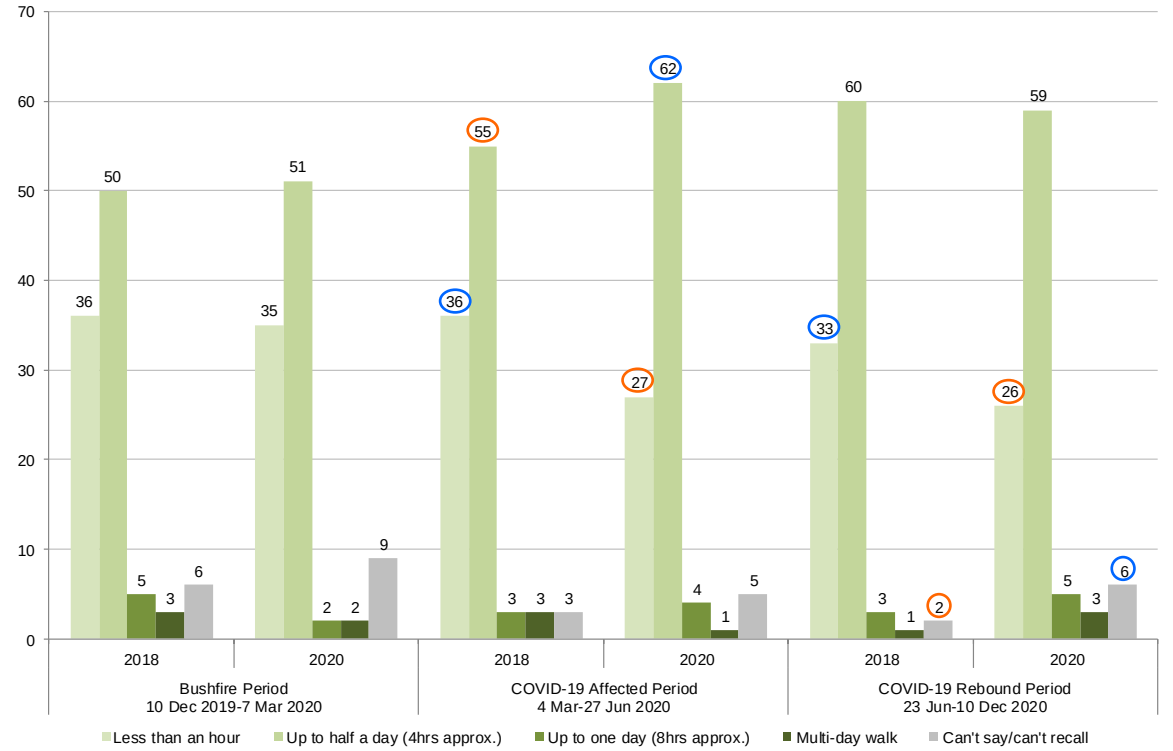
Source: NPWS Parks Visitor Surveys 2018-2020
Base: 2018 n=1,016; 2020 n= 752

Significantly lower
Significantly higher

When length of walk is analysed by COVID-19/Bushfire periods it can be seen that the length of walk was almost identical for people walking during the Bushfire period in 2018 and 2020 (Chart 122). However, walking length was longer in 2020 than in 2018 during the COVID-19 Affected period and the COVID-19 rebound period, with proportions walking for *up to half a day* significantly higher in 2020 than in 2018 for the COVID-19 Affected period (62% c.f. 55%), while proportions were significantly lower in 2020 than in 2018 for walking less than an hour in the COVID-19 Rebound

period (26% c.f. 33%). This appears to indicate that COVID-19 restrictions resulted in people taking longer walks, most likely for exercise during COVID-19 lockdowns and the habit was maintained once the restrictions were lifted.

Chart 122: Length of Walk by COVID-19/Bushfire Periods



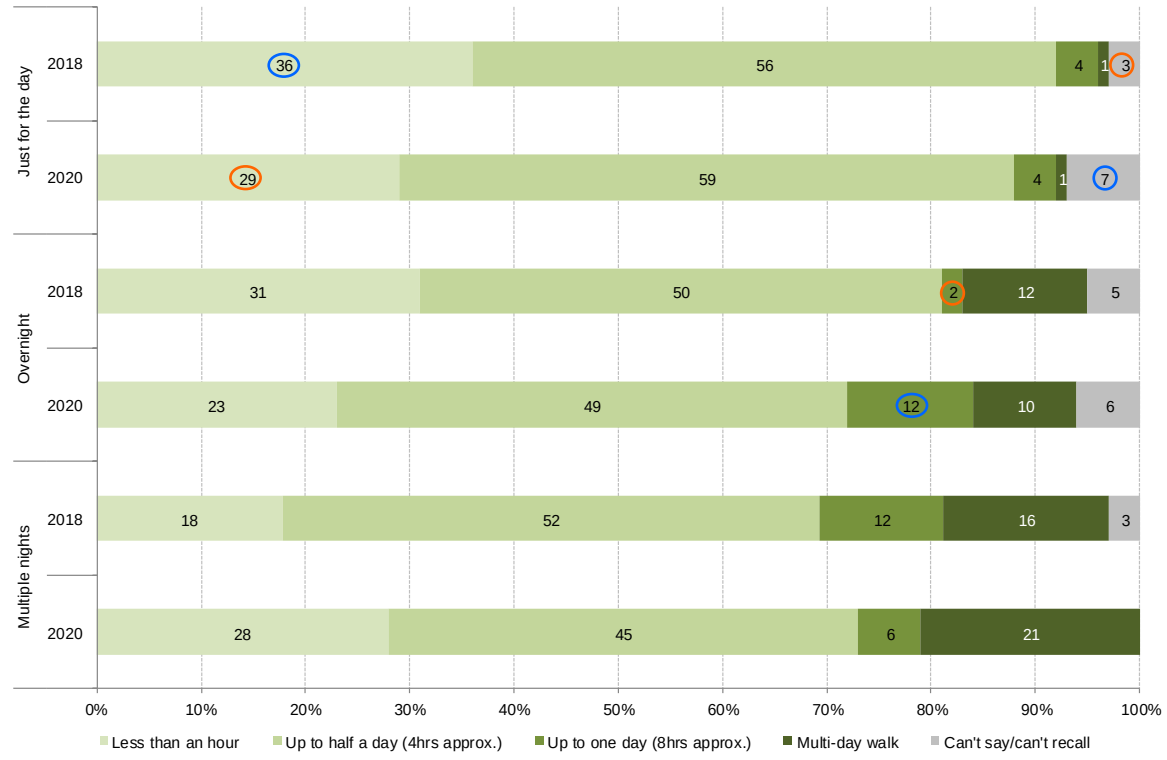
Source: NPWS Parks Visitor Surveys 2018-2020
Base: 2018 n=1,016; 2020 n= 752

Significantly lower
Significantly higher

Not surprisingly duration of visit to an NPWS park impacted on length of walk (Chart 123). Those visiting for *multiple nights* had the longest walking length and those visiting *just for the day* had the shortest walking length.

Walk length was slightly longer for those visiting *just for the day* in 2020 than in 2018, as the proportion walking for *less than an hour* declined significantly (29% - 2020; .36% - 2018). Similarly walk length was longer in 2020 for those staying *overnight* than in 2018, as the proportion walking for *up to one day* increased significantly from 2% in 2018 to 12% in 2020. Walk length was similar across years for those staying for *multiple nights* as even though the proportion walking for *less than an hour* increased in 2020 (from 18% to 28%) and the proportion walking for *up to half a day* correspondingly decreased (from 52% to 45%), the proportion taking *multi-day walks* increased (from 16% to 21%) to compensate.

Chart 123: Length of Walk by Duration of NPWS Park Visit



Source: NPWS Parks Visitor Surveys 2018-2020
Base: 2018 n=1,016; 2020 n=752

Significantly lower
Significantly higher

8.8 Satisfaction with Most Recent Visit to a NPWS Park

Respondents who had visited a NPWS park were asked to give an overall satisfaction rating based on the experience of their most *recent* visit. Chart 124 shows that in both 2008 and 2010 57% of visitors indicated that they *very satisfied* with the park experience on their most recent visit, while from 2012 and 2016 the proportion *very satisfied* increased to around 60% (59% in 2014). In 2018, the proportion *very satisfied* increased to 65%, significantly higher than in all previous years, while in 2020 the proportion declined slightly to 63%. In 2008 nine in ten were *at least satisfied* with their park visit (i.e. sum of those satisfied or very satisfied), with the proportion increasing to 93% in 2010 and 2012, and increasing again to 94% from 2014 to 2018, with a slight decline observed to 93% in 2020. The 2008 figure of 90% is significantly lower than all other years.

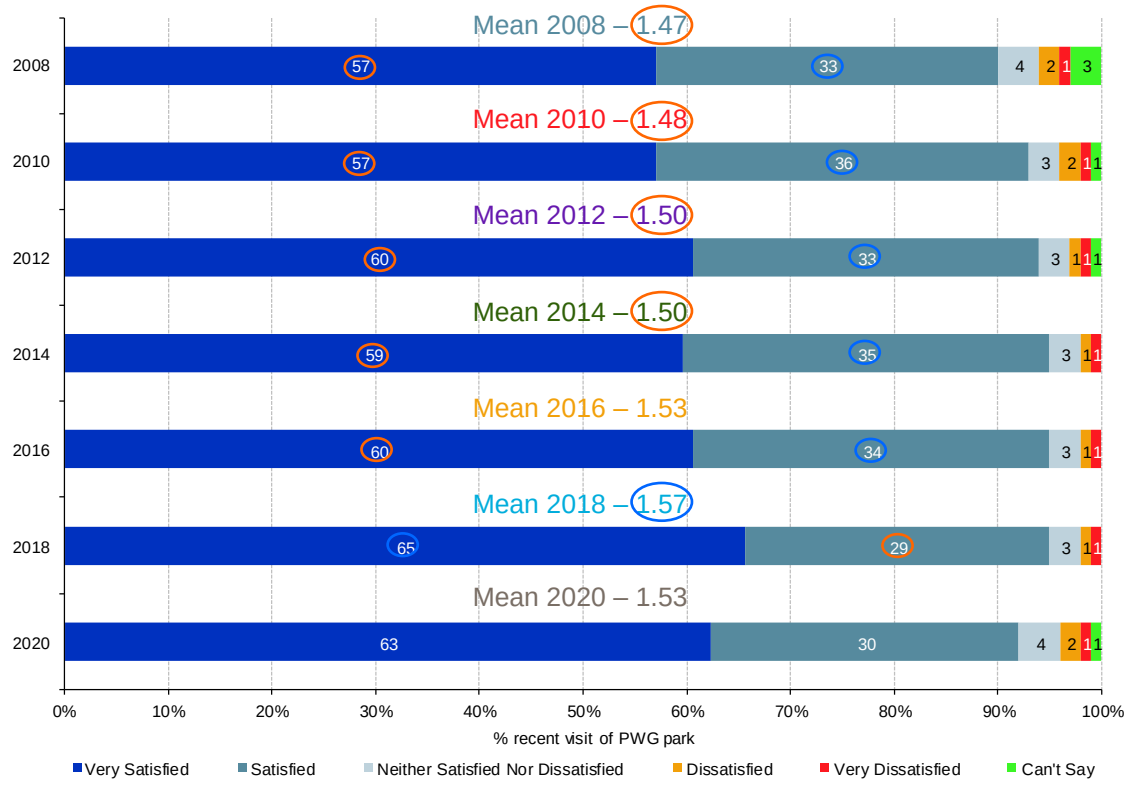
For all years mean satisfaction was calculated using the following scores:

- 2 points – Very satisfied
- 1 point – Satisfied
- 0 points – Neither satisfied nor dissatisfied
- -1 point – Dissatisfied
- -2 points – Very Dissatisfied

Those answering can't say were excluded from the mean satisfaction score calculation. The closer the mean score to 2 points, the higher the level of satisfaction. As can be seen, in 2008 and 2010 the

mean scores were similar at 1.47 and 1.48 respectively, while in 2012 and 2014 the mean rose to 1.50 and in 2016 it again rose to 1.53. In 2018 the mean satisfaction score increased again to 1.57, which was significantly higher than the 2008 to 2014 mean scores. In 2020 mean satisfaction returned to 2016 levels (1.53)

Chart 124: Satisfaction with Experience at Most Recently Visited NPWS Park

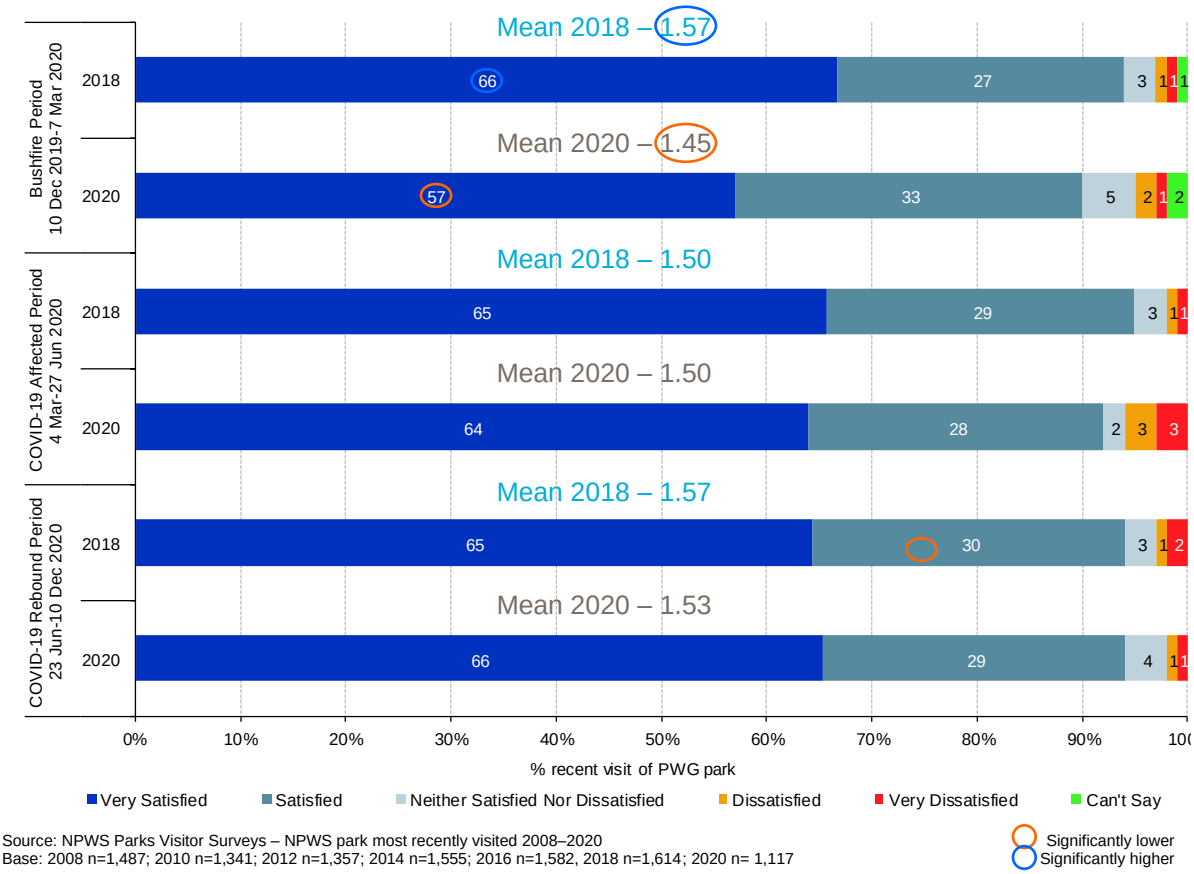


Source: NPWS Parks Visitor Surveys – NPWS park most recently visited 2008–2020
Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582, 2018 n=1,614; 2020 n= 1,117

Significantly lower
Significantly higher

When park satisfaction is analysed by COVID-19/Bushfire periods (Chart 125) it can be seen that the proportion *very satisfied* was consistent across years for both the COVID-19 Affected period and the COVID-19 Rebound period, but for the Bushfire period the proportion *very satisfied* was significantly lower in 2020 than in 2018 (57% c.f. 66%). Consequently the *mean satisfaction score* was significantly lower in 2020 than in 2018 for the Bushfire period (1.45 c.f. 1.57). This is most likely the result of bushfires impacting on a combination of experiential factors including access to parks (i.e. parts of parks being closed to visitors), limitation of time allowed to be spent in parks (due to park closures shortening park visits), the threat of danger (whether actual or perceived) of bushfires to park visitors, as well as smell (i.e. smoke) or being visually displeasing (due to burnt bushland or the actual view of flames nearby). It should be noted however, that the satisfaction level is still relatively high during this period, with the level of dissatisfaction not being markedly higher than in 2018, so despite the above issues, perceptions were still positive toward NPWS parks during the 2020 Bushfire period.

Chart 125: Satisfaction with Most Recently Visited NPWS Park by COVID-19/Bushfire Period



Source: NPWS Parks Visitor Surveys – NPWS park most recently visited 2008–2020
Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582, 2018 n=1,614; 2020 n= 1,117

Significantly lower
Significantly higher

The proportion *very satisfied* with their park experience is the highest recorded in 2020 amongst visitors from Remainder of southern QLD (74%). In 2020 the proportion '*total satisfied'* was the lowest recorded for visitors from Melbourne (81% - Table 28).

In general, *mean scores* for satisfaction in 2020 declined from 2018 levels, but not significantly so. The decline in mean scores from 2018 to 2020 were more marked for visitors from remainder NSW (1.52 – 2018; 1.46 – 2020) and remainder Victoria (1.65 – 2018; 1.35 – 2020),

Table 29 shows that females have higher levels of satisfaction with their recent experience at a NPWS park than do males. While the *mean satisfaction* rating for males has hovered around 1.44 for all years excepting 2018 for males, the mean score for females hovered around 1.53 from 2008 to 2014 and increased to around 1.62 in both 2016 and 2018. In fact, the highest mean score for satisfaction among females occurred in 2020 (1.63) with 70% *very satisfied*, also the highest proportion achieved across all years. It would appear that the 2019-2020 Bushfires did not impact as markedly on the satisfaction based perceptions of females as it did on males.

Table 28: Satisfaction with Most Recently Visited NPWS Park by Region of Origin

Region of Origin	Year	Very Satisfied	Satisfied	Neither Satisfied nor Dissatisfied	Dis-satisfied	Very Dissatisfied	Can't Say	Total Satisfied	Mean
Sydney	2008	57%	34%	4%	1%	1%	3%	91%	1.50
	2010	57%	38%	3%	1%	*	1%	95%	1.51
	2012	62%	32%	4%	1%	1%	1%	93%	1.54
	2014	59%	36%	3%	1%	*	*	95%	1.53
	2016	59%	35%	3%	2%	*	*	95%	1.53
	2018	66%	29%	3%	1%	1%	*	95%	1.59
	2020	64%	29%	4%	1%	1%	1%	93%	1.55
Remainder NSW	2008	56%	31%	4%	3%	2%	4%	87%	1.42
	2010	57%	33%	4%	3%	1%	*	91%	1.43
	2012	57%	35%	3%	2%	3%	*	92%	1.42
	2014	59%	32%	4%	1%	3%	*	91%	1.43
	2016	62%	31%	3%	2%	2%	1%	93%	1.51
	2018	64%	28%	4%	2%	2%	*	92%	1.52
	2020	60%	32%	3%	2%	2%		92%	1.46
ACT	2008	56%	32%	5%	2%	2%	3%	88%	1.42
	2010	56%	37%	4%	2%	1%	-	93%	1.45
	2012	60%	34%	3%	3%	1%	-	94%	1.50
	2014	66%	27%	5%	*	2%	-	93%	1.54
	2016	62%	33%	2%	2%	*	-	95%	1.55
	2018	71%	23%	4%	2%	*	-	94%	1.63
	2020	65%	26%	4%	-	2%	2%	92%	1.57
Melbourne	2008	53%	34%	3%	-	3%	6%	87%	1.41
	2010	50%	35%	5%	5%	5%	-	85%	1.20
	2012	55%	36%	6%	3%	-	-	92%	1.44
	2014	67%	25%	-	-	8%	-	92%	1.44
	2016	54%	35%	11%	-	-	-	89%	1.43
	2018	75%	23%	2%	-	-	-	98%	1.74
	2020	67%	14%	12%	-	-	-	81%	1.59
Remainder VIC	2008	43%	40%	4%	13%	-	-	83%	1.12
	2010	49%	32%	7%	-	-	12%	81%	1.48
	2012	57%	31%	6%	-	-	6%	88%	1.55
	2014	31%	66%	4%	-	-	-	96%	1.27
	2016	67%	29%	4%	-	-	-	96%	1.63
	2018	65%	35%	-	-	-	-	100%	1.65
	2020	43%	49%	8%	-	-	-	92%	1.35
Brisbane	2008	57%	37%	4%	-	-	2%	94%	1.55
	2010	56%	38%	2%	2%	2%	-	93%	1.43
	2012	73%	22%	2%	2%	-	-	95%	1.67
	2014	58%	39%	-	3%	-	-	97%	1.52
	2016	62%	37%	1%	-	-	-	99%	1.61
	2018	57%	39%	-	-	3%	-	97%	1.48
	2020	61%	36%	-	3%	-	-	97%	1.55
Remainder SE QLD	2008	55%	38%	1%	2%	1%	3%	93%	1.47
	2010	54%	36%	5%	4%	-	-	91%	1.41
	2012	49%	50%	2%	-	-	-	98%	1.47
	2014	69%	19%	6%	5%	-	-	89%	1.53
	2016	65%	29%	3%	2%	1%	-	94%	1.55
	2018	48%	41%	10%	-	1%	-	89%	1.35
	2020	74%	19%	-	7%	-	-	93%	1.60
Total NSW	2008	57%	33%	4%	2%	1%	3%	90%	1.47
	2010	57%	36%	3%	2%	1%	1%	94%	1.49
	2012	60%	33%	3%	1%	2%	1%	93%	1.50
	2014	59%	35%	3%	1%	1%	*	94%	1.50
	2016	60%	34%	3%	2%	1%	*	94%	1.52
	2018	65%	29%	3%	1%	1%	*	94%	1.57
	2020	63%	30%	4%	1%	1%	1%	93%	1.53
Total Interstate	2008	54%	36%	3%	2%	2%	3%	90%	1.42
	2010	54%	36%	4%	3%	2%	1%	90%	1.39
	2012	59%	35%	4%	2%	*	1%	94%	1.51
	2014	60%	33%	2%	2%	2%	-	93%	1.47
	2016	61%	33%	5%	1%	*	-	95%	1.55
	2018	64%	32%	3%	*	1%	-	96%	1.58
	2020	64%	27%	5%	2%	*	2%	91%	1.55

Source: NPWS Parks Visitor Surveys – NPWS park most recently visited 2008–2020
Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582, 2018 n=1,614; 2020 n= 1,117

Table 29: Satisfaction with Most Recently Visited NPWS Park by Sex

Sex	Year	Very Satisfied	Satisfied	Neither Satisfied nor Dissatisfied	Dis-satisfied	Very Dissatisfied	Can't Say	Total Satisfied	Mean
Males	2008	53%	36%	4%	2%	1%	3%	89%	1.43
	2010	54%	38%	3%	2%	1%	1%	92%	1.44
	2012	56%	36%	4%	2%	1%	1%	91%	1.44
	2014	59%	34%	4%	2%	2%	*	92%	1.47
	2016	55%	38%	4%	2%	1%	1%	93%	1.44
	2018	62%	31%	4%	2%	1%	*	93%	1.52
	2020	57%	34%	4%	2%	2%	1%	91%	1.44
Females	2008	61%	30%	3%	2%	1%	3%	90%	1.51
	2010	60%	34%	4%	2%	*	*	94%	1.52
	2012	65%	29%	2%	1%	2%	*	95%	1.57
	2014	60%	36%	2%	1%	1%	*	95%	1.53
	2016	67%	29%	3%	1%	*	*	96%	1.62
	2018	69%	27%	2%	1%	1%	*	96%	1.62
	2020	70%	24%	4%	1%	1%	1%	94%	1.63

Source: NPWS Parks Visitor Surveys – NPWS park most recently visited 2008–2020
Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582, 2018 n=1,614; 2020 n=1,117

Table 30 shows that the general trend by age for satisfaction with one's park visit experience from 2008 to 2016 and in 2020 is that satisfaction increases with age (2018 being the only exception). 18-24 years olds appear to be the main cause of the fall in satisfaction levels in 2020, with mean scores falling back to 2016 levels amongst this group (1.40). Mean scores for 25-34 year olds, 35-49 year olds and those aged 50 years and over only declined by 0.1 between 2018 and 2020.

Table 30: Satisfaction with Most Recently Visited NPWS Park by Age

Age	Year	Very Satisfied	Satisfied	Neither Satisfied nor Dissatisfied	Dis-satisfied	Very Dissatisfied	Can't Say	Total Satisfied	Mean
18-24 yrs	2008	41%	52%	2%	2%	1%	3%	93%	1.34
	2010	45%	49%	6%	-	-	-	94%	1.39
	2012	51%	43%	3%	-	1%	2%	94%	1.46
	2014	59%	34%	5%	-	2%	-	93%	1.48
	2016	51%	43%	4%	1%	2%	-	94%	1.40
	2018	65%	35%	-	1%	-	-	99%	1.63
	2020	58%	33%	4%	2%	3%	-	91%	1.40
25-34 yrs	2008	48%	40%	5%	1%	1%	5%	88%	1.39
	2010	54%	40%	2%	2%	1%	*	94%	1.44
	2012	52%	41%	4%	1%	1%	-	93%	1.41
	2014	48%	43%	5%	2%	1%	*	92%	1.35
	2016	52%	42%	4%	2%	-	1%	94%	1.45
	2018	61%	35%	3%	1%	1%	*	96%	1.55
	2020	61%	35%	2%	1%	1%	*	96%	1.54
35-49 yrs	2008	63%	26%	4%	3%	2%	2%	90%	1.50
	2010	58%	35%	3%	3%	*	*	94%	1.50
	2012	61%	31%	4%	1%	1%	1%	92%	1.51
	2014	65%	30%	3%	2%	1%	-	94%	1.55
	2016	61%	34%	3%	2%	1%	-	94%	1.52
	2018	66%	27%	4%	1%	2%	*	93%	1.54
	2020	64%	29%	5%	2%	1%	*	92%	1.53
50+ yrs	2008	60%	30%	4%	2%	1%	4%	90%	1.51
	2010	61%	30%	4%	2%	1%	1%	91%	1.50
	2012	66%	28%	2%	2%	2%	1%	94%	1.55
	2014	61%	34%	2%	1%	1%	1%	95%	1.54
	2016	67%	27%	3%	1%	*	1%	95%	1.60
	2018	68%	26%	3%	2%	1%	*	93%	1.58
	2020	67%	25%	3%	1%	1%	2%	92%	1.57

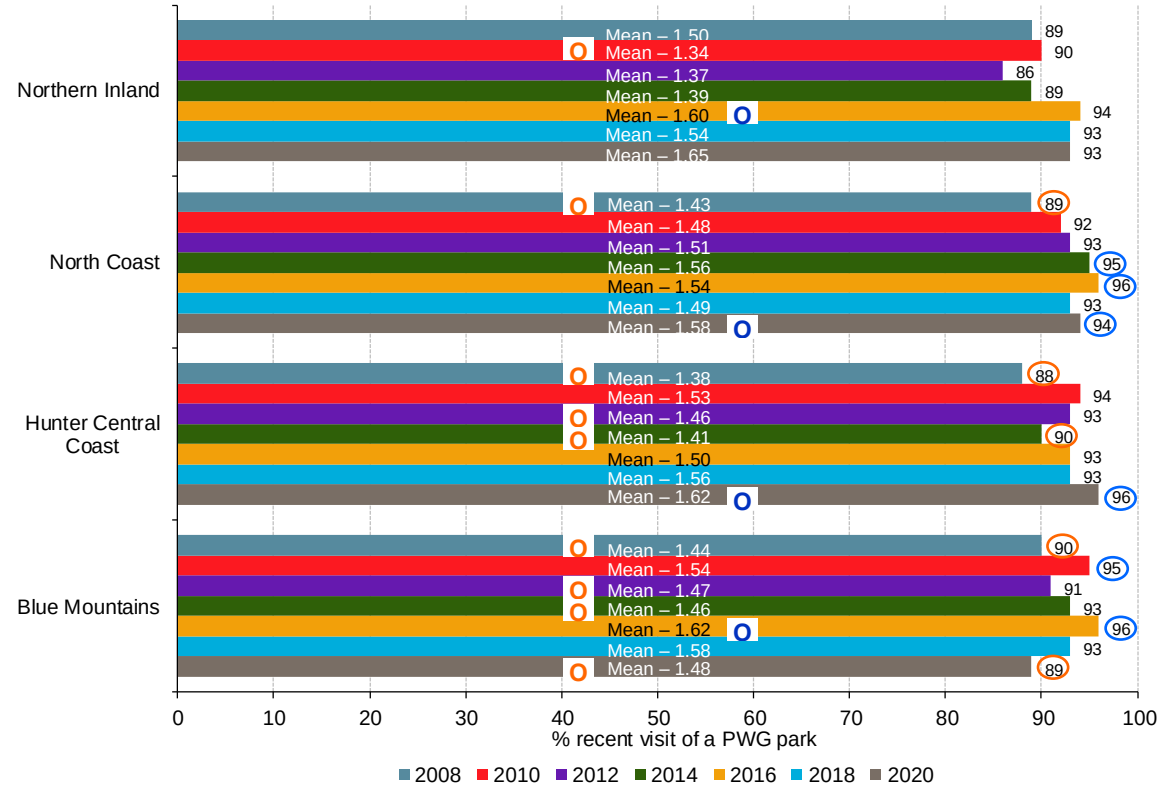
Source: NPWS Parks Visitor Surveys – NPWS park most recently visited 2008–2020
Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582, 2018 n=1,614; 2020 n=1,117

Analysis by NPWS Branch has only been provided for *overall satisfaction* (i.e. satisfied + very satisfied) and is detailed in Chart 126 and Chart 127.

Only Hunter Central Coast Branch attained its highest *overall satisfaction* score in 2020 (96%), while Blue Mountains received its lowest score (89%). Declines in overall satisfaction in 2020 were also observed for Southern Ranges (93%) and South Coast Branches (93%)

Mean scores for North Coast (1.58), Hunter Central Coast (1.62) and Northern Inland Branch (1.65) were the highest recorded in 2020. However, the *mean score* for the South Coast Branch was the lowest recorded (1.45).

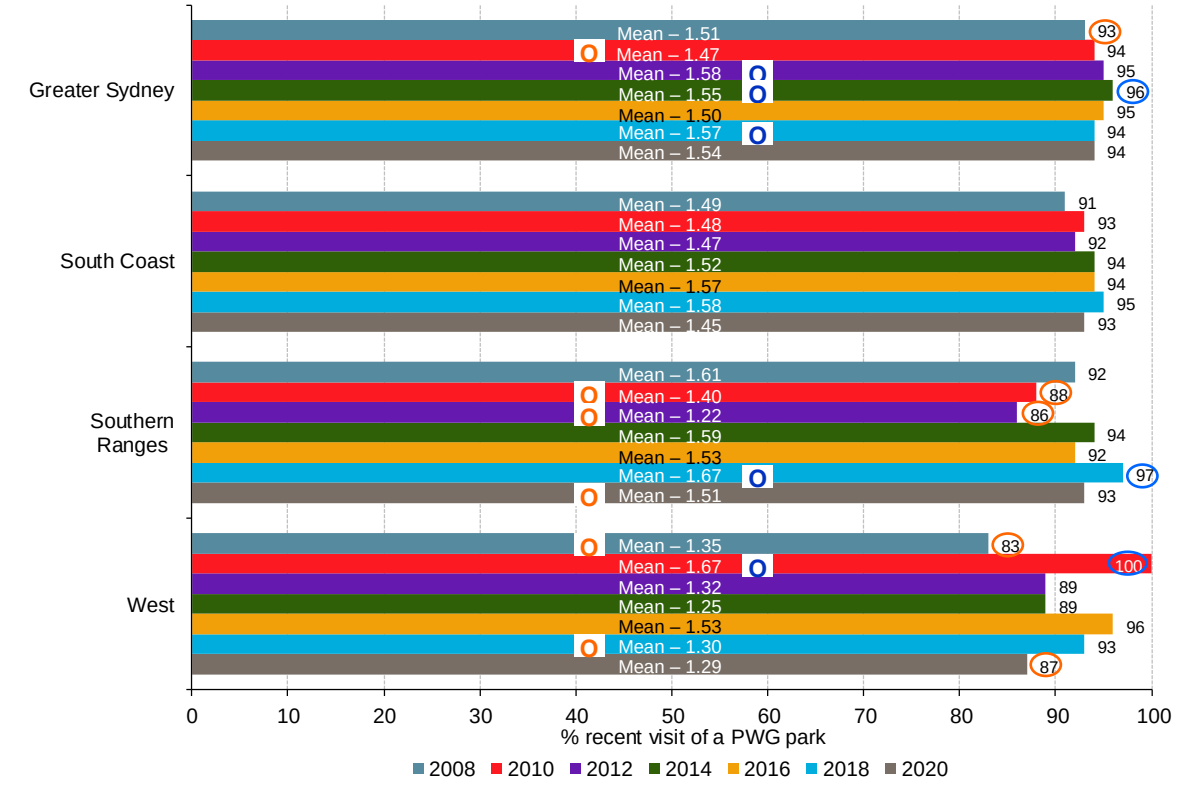
Chart 126: Satisfaction with Most Recently Visited NPWS Park by Branch (Part 1)



Source: NPWS Parks Visitor Surveys – NPWS park most recently visited 2008–2020
Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582, 2018 n=1,614; 2020 n= 1,117

Significantly lower
Significantly higher

Chart 127: Satisfaction with Most Recently Visited NPWS Park by Branch (Part 2)



Source: NPWS Parks Visitor Surveys – NPWS park most recently visited 2008–2020
Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582, 2018 n=1,614; 2020 n= 1,117

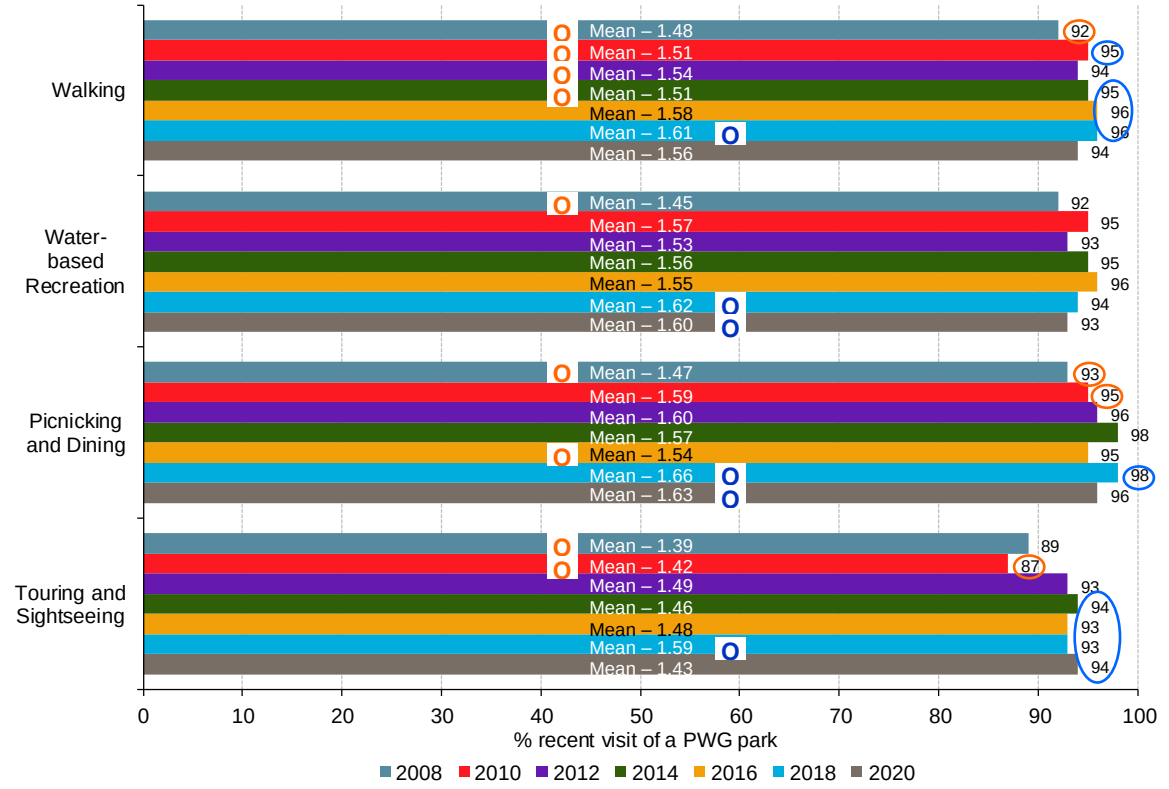
Significantly lower
Significantly higher

Overall satisfaction with one's NPWS park visit was equal highest in 2020 for people who undertook *touring and sightseeing* activities (94% - in line with 2014 results). For the remaining three major activities *overall satisfaction* declined form 2018 levels in 2020 (see Chart 128).

For all four major activities the mean score for satisfaction with one's park visit was lower in 2020 than in 2018.

There were no marked differences in overall satisfaction and mean satisfaction when analysed by trip type, trip duration and role of park visit in one's trip, with the exception that overall satisfaction was significantly lower in 2020 than in 2018 if the visitor's most recent trip was part of a larger/bigger day trip (96% - 2018; 92% - 2020 – no shown in graphical format).

Chart 128: Satisfaction with Most Recently Visited NPWS Park by Main Activity



Source: NPWS Parks Visitor Surveys – NPWS park most recently visited 2008–2020
Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582, 2018 n=1,614; 2020 n=1,117

Significantly lower
Significantly higher

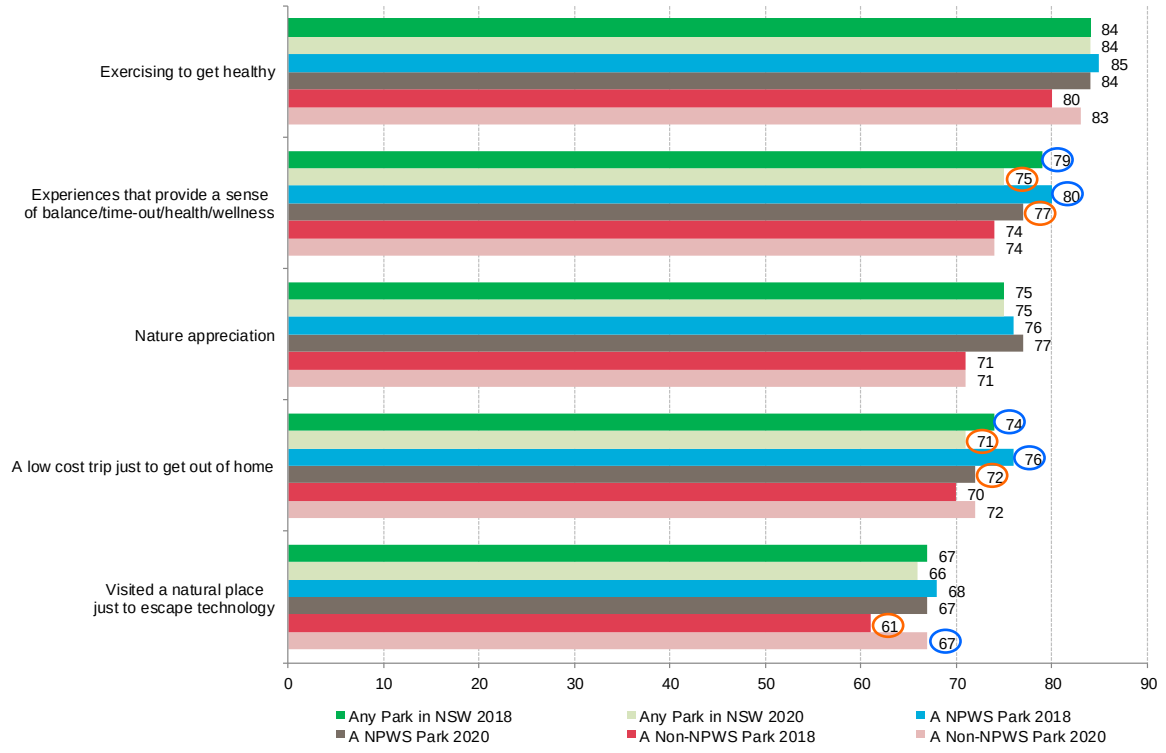
9. Park Visitor Needs Based Segmentation

In 2016 the research agency Instinct and Reason undertook a needs-based segmentation for the NPWS. Originally a four-segment model was devised and then enhanced by breaking down the four segments based on whether people were open or not open to an overnight stay in a national park. The basis for this segmentation was two questions – incidence of undertaking selected activities in the last 12 months and likelihood of visiting a NSW National Park for an overnight stay in the next 12 months. For the 2018 and 2020 NSW Parks Visitor Surveys, these questions were asked of all visitors to a park in NSW in the last 4 weeks (along with another to assess likelihood of day trip to NSW National Parks in the next 12 months) to enable a comparison of park visitors with the general population.

Charts 129 to 131 show the proportion of leisure activities undertaken in the last 12 months by those visiting any park in NSW, those visiting an NPWS park and those visiting a non-NPWS park for both 2018 and 2020. Note that a respondent can visit both an NPWS park and a non-NPWS park in the same visitation period. *Exercising to get healthy* was the only activity to attract an 80% response or more across the three visitor types analysed in both 2018 and 2020.

Overall, the proportions nominating most activities declined in from 2018 to 2020, some significantly so. This is likely due to COVID-19 restrictions impacting on people's ability to undertake such activities in 2020.

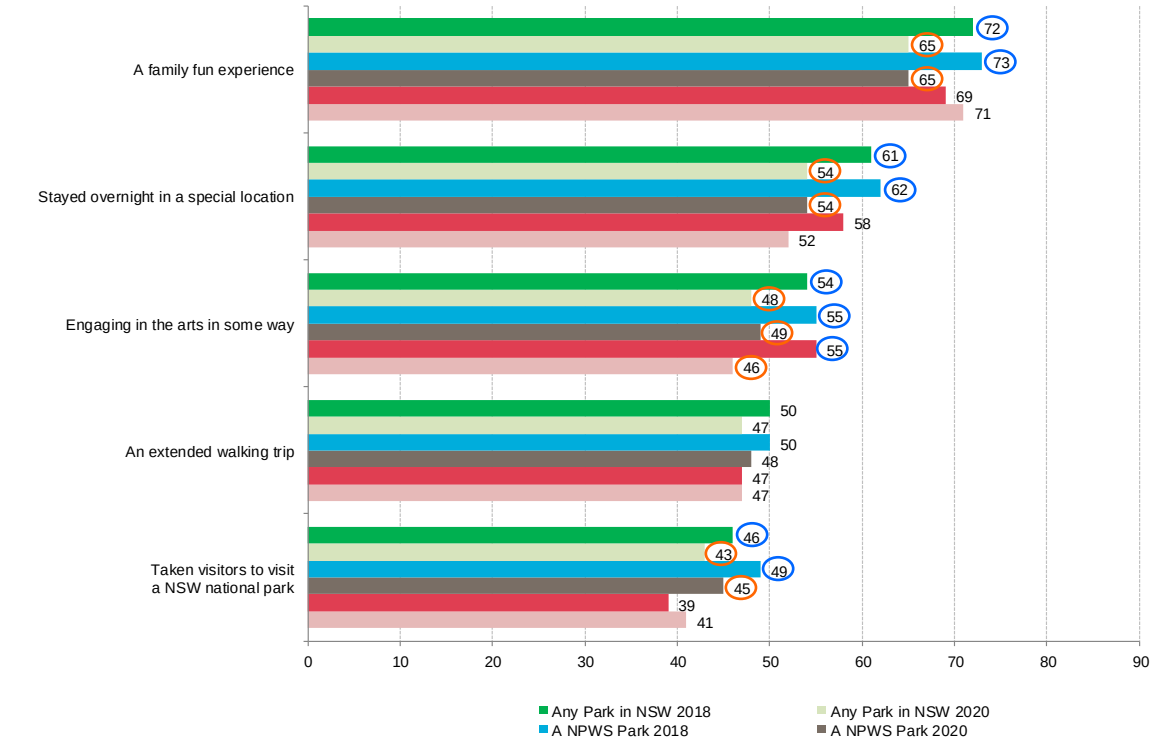
Chart 129: Activities Undertaken for Leisure Purposes in the Last 12 months – Part 1



Source: NPWS Parks Visitor Surveys 2018-2020 – Visited a park in NSW in the last 4 weeks
Base: 2018 - n=2,094; 2020 n= 1,450

Significantly lower
Significantly higher

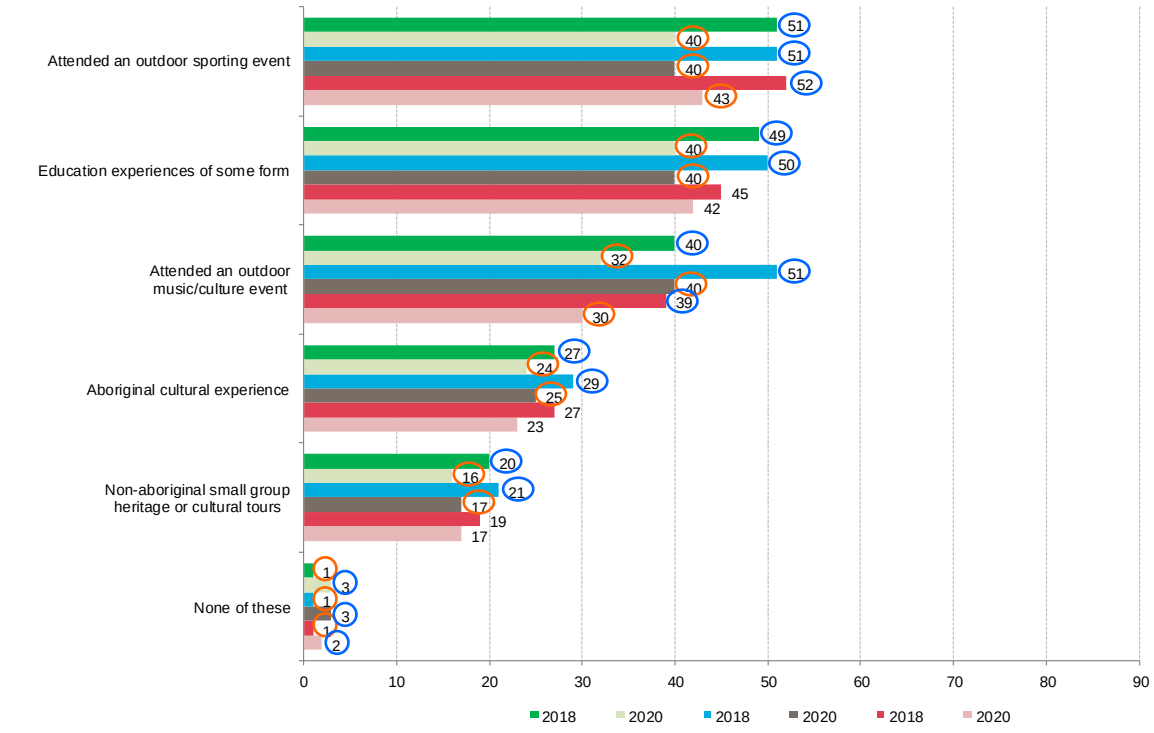
Chart 130: Activities Undertaken for Leisure Purposes in the Last 12 months – Part 2



Source: NPWS Parks Visitor Surveys 2018-2020 – Visited a park in NSW in the last 4 weeks
Base: 2018 - n=2,094; 2020 n= 1,450

Significantly lower
Significantly higher

Chart 131: Activities Undertaken for Leisure Purposes in the Last 12 months – Part 3

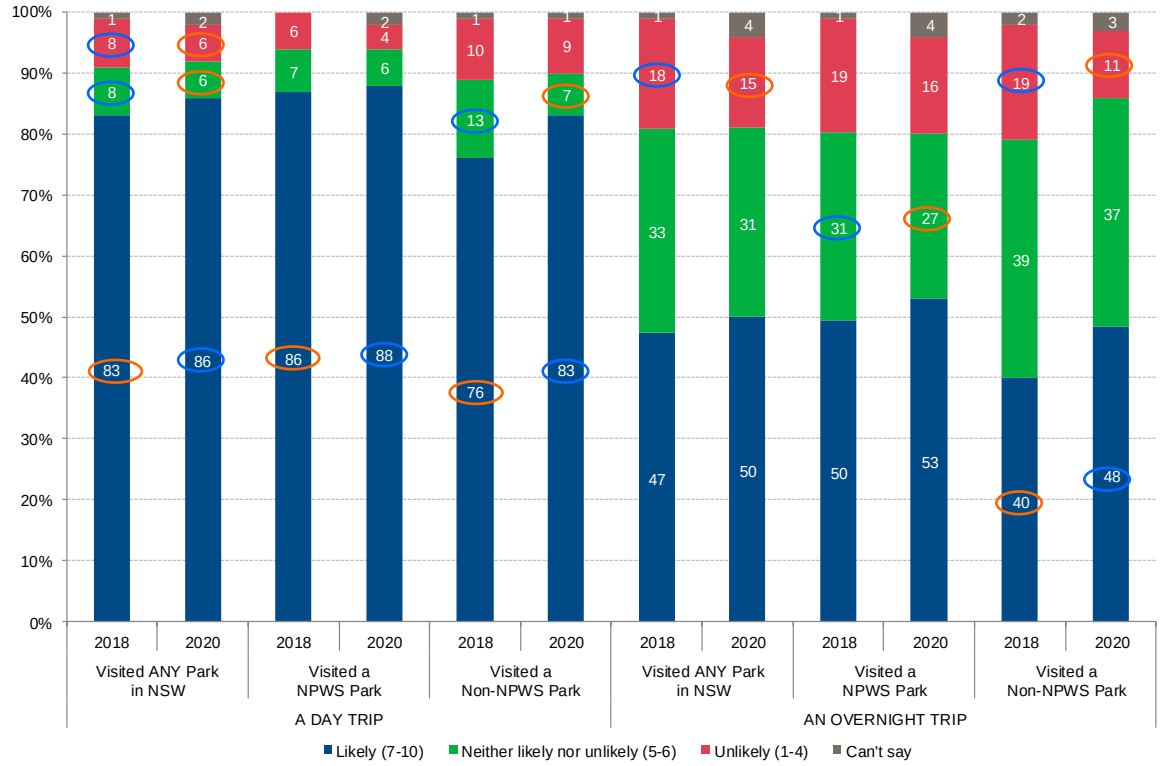


Source: NPWS Parks Visitor Surveys 2018-2020 – Visited a park in NSW in the last 4 weeks
Base: 2018 - n=2,094; 2020 n= 1,450

Significantly lower
Significantly higher

In relation to likelihood of visiting a NSW National park in the next 12 months (Chart 132), it is not surprising that those who had visited a NPWS park in the last 4 weeks had higher proportions in both 2018 and 2020 claiming that were likely to visit for both *a day trip* (86% - 2018; 88% - 2020) and for *an overnight trip* (50% - 2018; 53% - 2020). Encouragingly, the proportions likely to visit a NSW National Park in the next 12 months increased in proportion from 2018 to 2020, perhaps as a result of COVID-19 restrictions constraining capacity to visit these parks in 2020.

Chart 132: Likelihood if taking a day trip or an overnight trip to a NSW National Park in the next 12 months

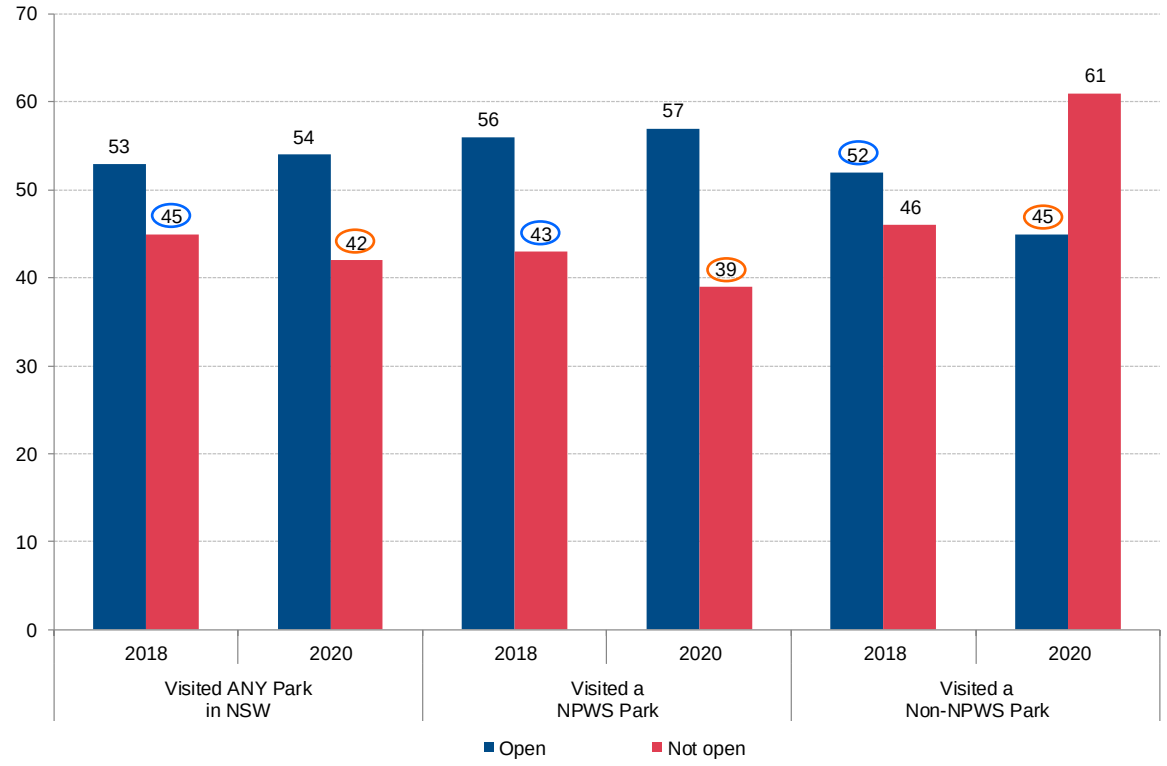


Source: NPWS Parks Visitor Surveys 2018-2020 – Visited a park in NSW in the last 4 weeks
Base: 2018 - n=2,094; 2020 n= 1,450

Significantly lower
Significantly higher

To replicate the needs-based segmentation the question on likelihood of visiting a NSW National Park overnight was re-categorised so that those 'open' to visiting gave scores of 6-10 out of ten and those 'not open' to visiting gave scores of 1-5 out of ten. Chart 133 shows that those that have visited an NPWS park in the last 4 weeks in both 2018 and 2020 (56% and 57% respectively) were more likely than those who had visited a non-NPWS park (52% and 45% respectively) to be *open* to an overnight trip to a NSW National park in the next 12 months, with a significant decline in the proportion open evident in 2020 for those who had visited a non-NPWS park.

Chart 133: Open or not open to overnight trip to a NSW National Park in the next 12 months



Source: NPWS Parks Visitor Surveys 2018-2020 – Visited a park in NSW in the last 4 weeks
Base: 2018 - n=2,094; 2020 n= 1,450

Significantly lower
Significantly higher

9.1 Segment Profile

When comparing the 4 core segments from the original segmentation study with the NPWS parks Visitor Survey, park visitors visiting a park of any type have higher proportions categorised as *Adventurers*, while fewer are categorised as *Explorers* (see Chart 134). From 2018 to 2020 the proportion of *Adventurers* has significantly increased across all visitor types at the expense of both *Socialisers* and *Escapers* whose proportions have declined since 2018.

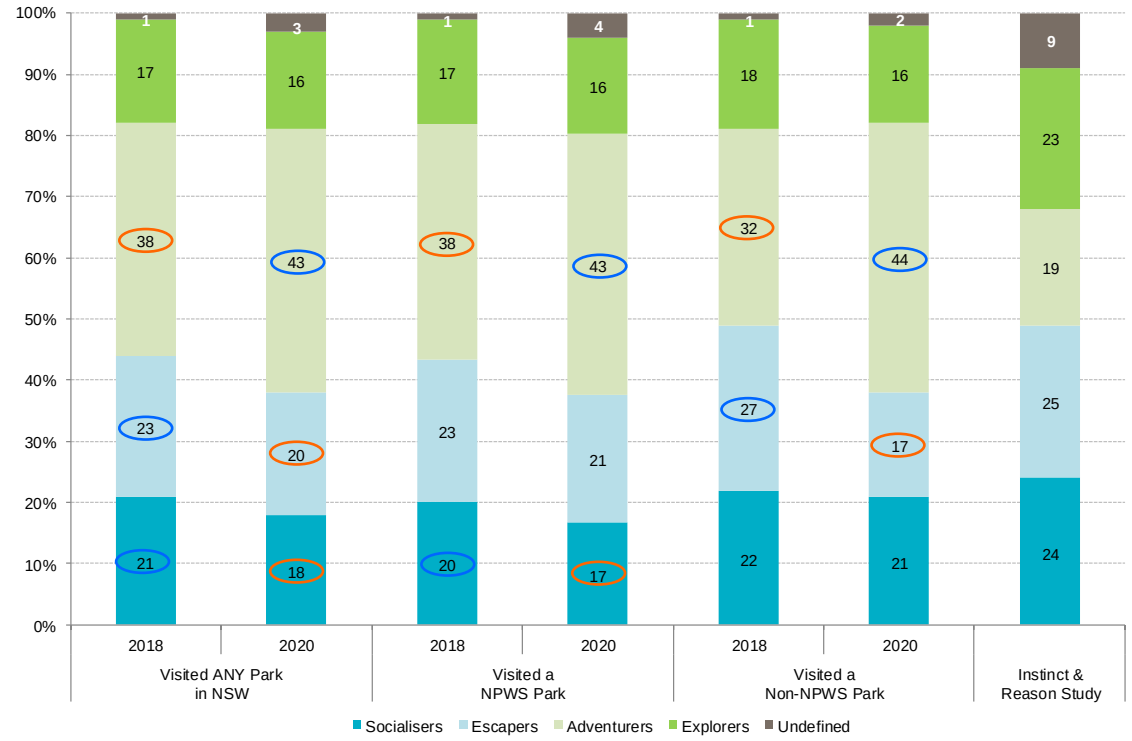
Adventurers are looking for parks to provide venues where they can do their own thing, be spontaneous and independent, where they can be with nature and where walking is great.

Explorers don't want to go to the same place twice, like to do the same activity in different places (fish, surf etc.) and are enticed with special deals, events and word of mouth recommendations.

Socialisers are groups for whom the park is a backdrop – a low cost venue or a venue where they can exercise, or where they'd want to take children to see the natural world.

Escapers are looking for nature to provide a venue to slow the pace down and allow them to put life into context. A venue that has arts, where there is no pressure and does not require walking.

Chart 134: Core Segments



Source: NPWS Parks Visitor Surveys 2018-2020 – Visited a park in NSW in the last 4 weeks; Instinct & Reason Need-based Segmentation
Base: NPWS Parks Visitor Survey 2018 - n=2,094; 2020 n=1,450; Instinct and Reason Study – n=2,542

Significantly lower
Significantly higher

Split into the 8 sub-segments based on openness to an overnight visit to a NSW National park the following characteristics were evident from the initial segmentation study.

Adventurers open to an overnight stay are married or de facto, working full time, motivated by cultural and educational experiences, and wanting family friendly activities (especially for under 5 year olds).

Adventurers not open to an overnight stay have a lack of knowledge of national parks, needing parks to deliver experiences for slightly older children (11-14 years) that really engage them and encourage parents to take them. However, they generally have one child aged 15-24 and do not work.

Explorers open to an overnight stay are aged 18-34 with children. The have completed tertiary education and work full time. They are passionate about the NPWS and seek balance and wellness activities. They want nature-based escape experiences that encompass adventure/outdoor activities that can be done as couples and young adult singles leveraging varied accommodation.

Explorers not open to an overnight stay have an older skew (aged 65+, retirees) with more entrenched views of parks based on infrequent and uninspiring visits over the years. They need new balance and wellness style activities that are convenient and non-challenging.

Socialisers open to an overnight stay are married/de facto, working full time with younger children and are interested in overnight camping/bushwalks, adventure, plus guided tours that open up adventure experiences.

Socialisers not open to an overnight stay have past experiences that have been uninspiring. They have one child aged 11-14 years. They visit national parks for 1-2 hours, taking very short walks, mainly socialising with family/friends. They need soft adventure experiences that inspire.

Escapers open to an overnight stay are couples and singles aged 25-29 and families with older children. They are well educated and generally work full time. The have a keen desire to visit, but need reasons to get parks into the diary. They need great accommodation options with associated discovery experiences.

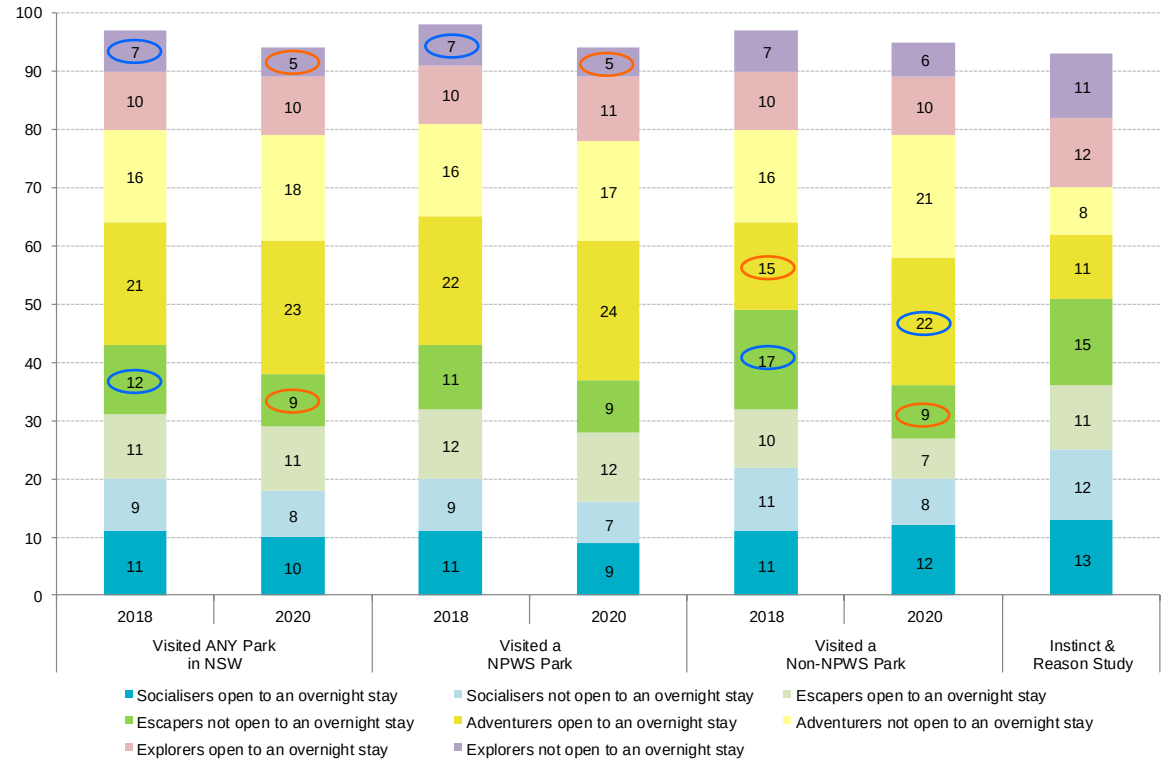
Escapers not open to an overnight stay are aged 50-54, retired, poorer with lower education and lower interest and knowledge of national parks. The need low cost discovery experiences that last a day or less and are easy to take part in.

Chart 135 shows that the proportion *of Escapers not open to an overnight stay* has significantly declined from 2018 to 2020 for those who have visited any park in NSW in the last 4 weeks (12% c.f. 9%) and this is primarily the result of the decline in this segment amongst those who visited a non-NPWS park in the last 4 weeks (17% c.f. 9%). Amongst non-NPWS park visitors there has also been a significant increase in the proportion of Adventurers open to an overnight stay (15% - 2018; 22% - 2020).

For those visiting NPWS parks there has been slight but not significant growth from 2018 to 2020 among *Adventurers open to an overnight stay* (22% c.f. 24%), *Adventurers not open to an overnight stay* (16% c.f. 17%) and *Explorers open to an overnight stay* (10% c.f. 11%).

Based on the original segmentation, NPWS park visitors would therefore tend to be (a) motivated by cultural and educational experiences and wanting family friendly activities; or alternatively (b) needing parks to deliver experiences that really engage tweens (11-14 year olds) and encourage their parents to take them.

Chart 135: Core Sub-segments



Source: NPWS Parks Visitor Surveys 2018-2020 – Visited a park in NSW in the last 4 weeks; Instinct & Reason Need-based Segmentation
Base: NPWS Parks Visitor Survey 2018 - n=2,094; 2020 n=1,450; Instinct and Reason Study – n=2,542

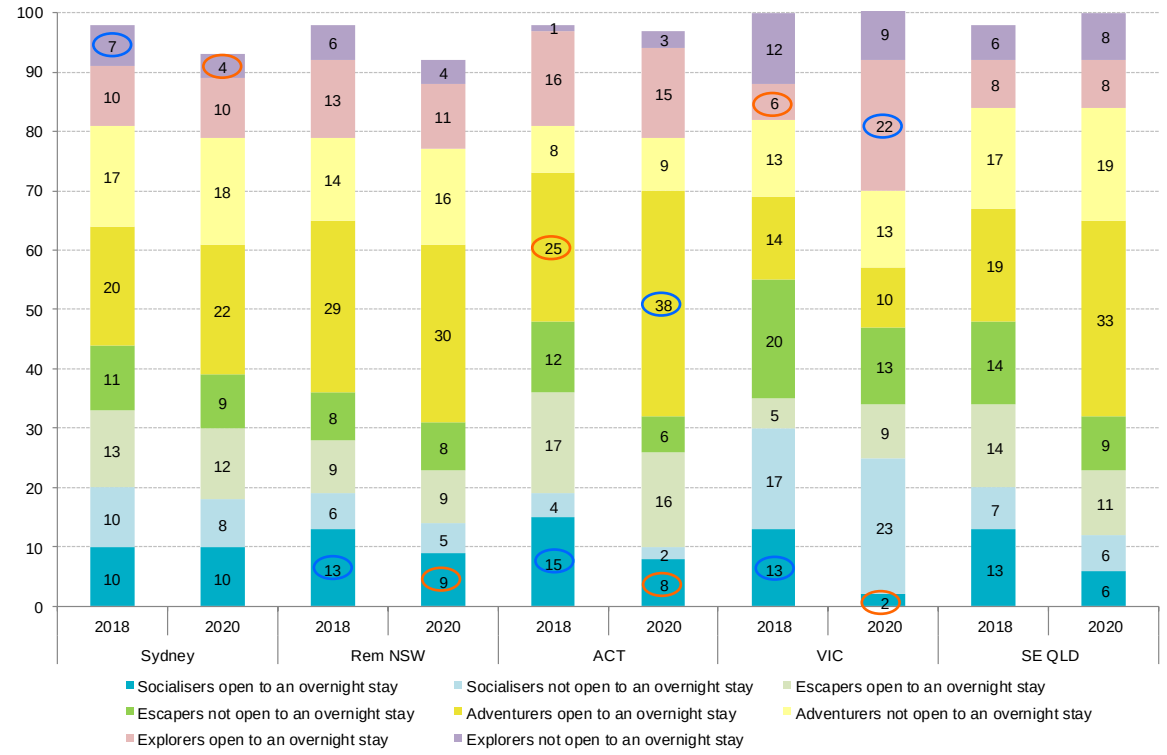
Significantly lower
Significantly higher

When analysed by region of origin the proportion of *Socialisers open to an overnight stay* has declined from 2018 to 2020, significantly so for those living in remainder NSW, ACT and Victoria. The proportion of *Socialisers not open* to an overnight stay has generally declined from 2018 to 2020, although the proportions increased for those living in Victoria (from 17% in 2018 to 23% in 2020). Victorians have by far the greatest proportions of this segment. The proportion of *Escapers open to an overnight stay* has not changed markedly over time by region of origin. However, the proportion of *Escapers not open* to an overnight stay generally declined from 2019 level in 2020 across all regions, but no significantly so.

The largest segment for NPWS visitors is *Adventurers open to an overnight stay*. Proportions in this segment have generally increased from 2018 to 2020, significantly so for people living in the ACT (from 25% to 38%), although a decline was evident amongst Victorian park visitors (14% c.f. 10% - not significant).

Adventurers not open to an overnight stay generally slightly increased or maintained their 2018 proportions. Proportions of *Explorers open to an overnight stay* also generally maintained or slightly declined in 2020, with the exception for Victorian park visitors where a significant increase in this segment was observed (6% c.f. 22%). The proportions of *Explorers not open to an overnight stay* has generally declined since 2018 for NSW and Victorian residents, but increased slightly for ACT and Queensland residents (see Chart 136).

Chart 136: Core Sub-segments by Region of Origin (NPWS Park Visitors)



Source: NPWS Parks Visitor Surveys 2018-2020 – Visited a NPWS park n the last 4 weeks
Base: 2018; n=1,718' 2020, 1,178

Significantly lower
Significantly higher

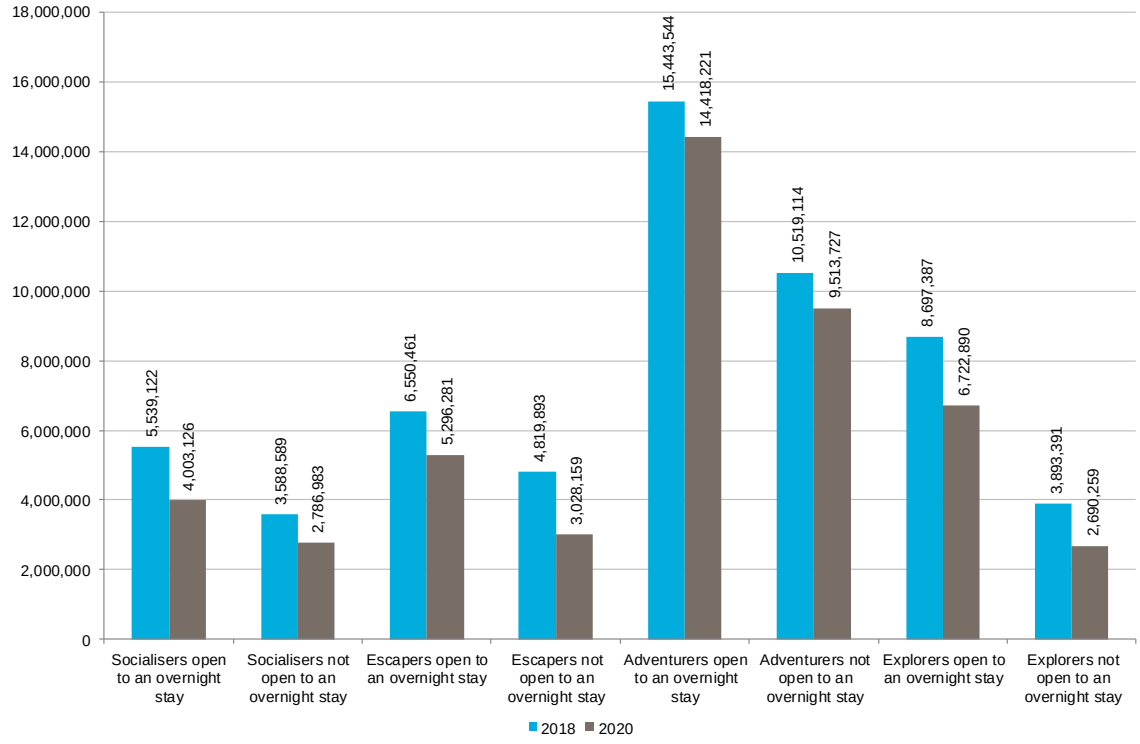
9.2 NPWS Park Visits by Segment

As might be expected, given the decline in NPWS visits from 2018 to 2020, the number of visits in each segment declined. *Adventurers open to an overnight stay* contributed the most visits in 2020 (14.4m), down from 15.4m visits in 2018 (see Chart 137). *Adventurers not open to an overnight stay* contributed the next highest proportion of visits (9.5m), down from 10.5m in 2018. The third most visits in 2020 came from *Explorers open to an overnight stay* (6.7m), down from 8.7m in 2018.

Chart 138 compares the percentage contribution of the eight visitor sub-segments with their contribution to total NPWS park visits. *Adventures open to an overnight stay* contribute a greater proportion of visits than they represent among visitors. This was evident in both 2018 (22% visitors; 26% visits) and 2020 (24% visitors; 29% visits). *Adventurers not open to an overnight stay* also contribute more to visits than they represent among visitors in both 2018 (18% visits c.f. 16% visitors) and in 2020 (19% visits c.f. 17% visitors). *Explorers open to an overnight stay* also over-contribute to visits compared with their representation among visitors (14% c.f. 10% in 2018 and 14% c.f. 11% in 2020).

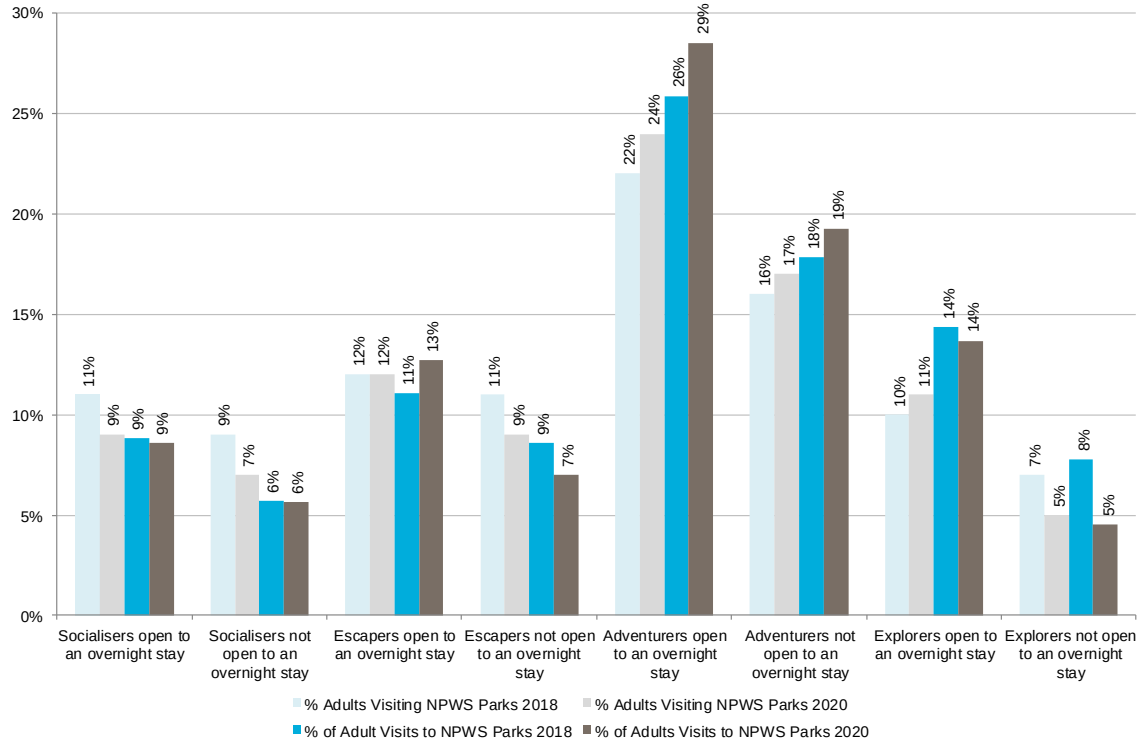
Table 31 shows the average number of visits to NPWS parks by sub-segment. Average number of visits increased for each sub-segment, with the exception of *Explorers both open and not open* to an overnight stay. *Explorers open* to an overnight stay continue to have the highest average number of visits at 3.64 in 2020, followed by *Adventurers open* to an overnight stay (3.40) and *Adventurers not open* to an overnight stay (3.28).

Chart 137: NPWS Visits by Sub-Segment



Source: NPWS Parks Visitor Surveys 2018-2020 – Visited a NPWS park in the last 4 weeks
Base: 2018 n=1,718; 2020 n=1,178

Chart 138: NPWS Visit Contribution by Sub-Segment



Source: NPWS Parks Visitor Surveys 2018-2020 – Visited a NPWS park in the last 4 weeks
Base: 2018 n=1,687; 2020 n=1,117

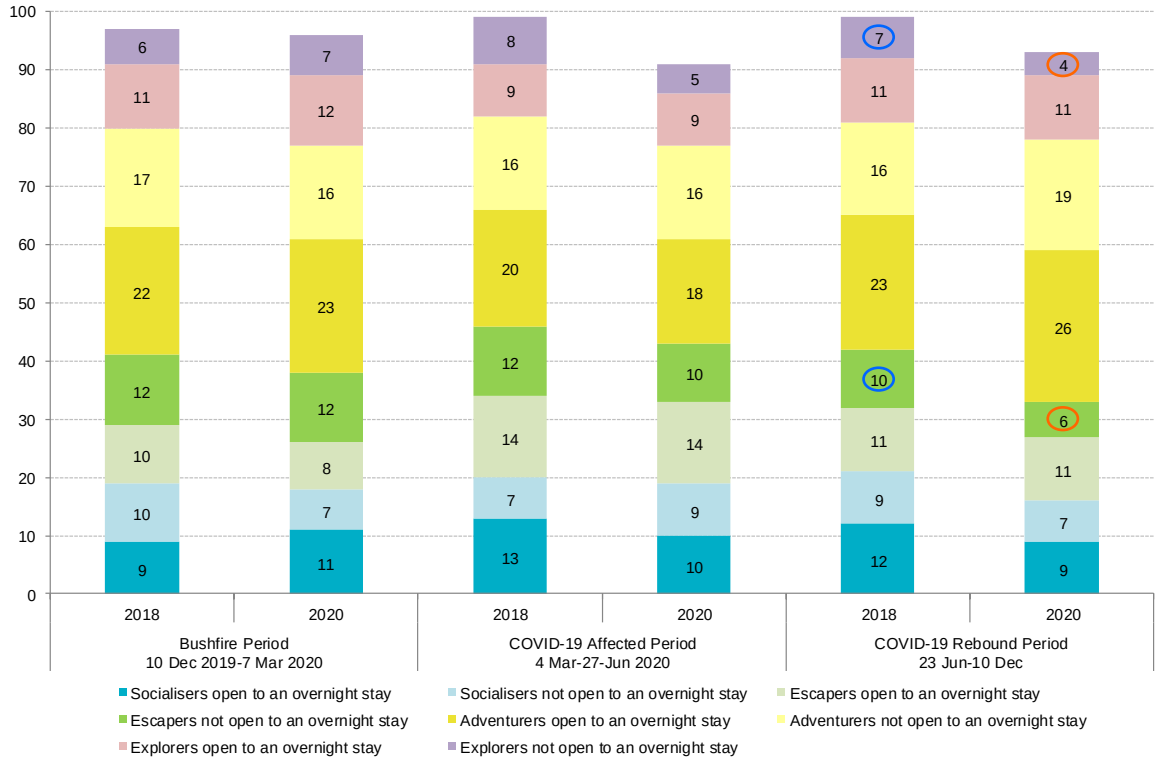
Table 31: Average Visits to NPWS Parks by Sub-segment

Segment	2018	2020	Segment	2018	2020
Socialisers open to an overnight stay	2.12	2.65	Adventurers open to an overnight stay	3.20	3.40
Socialisers not open to an overnight stay	1.78	2.20	Adventurers not open to an overnight stay	3.02	3.28
Escapers open to an overnight stay	2.54	3.17	Explorers open to an overnight stay	3.80	3.64
Escapers not open to an overnight stay	2.16	2.30	Explorers not open to an overnight stay	3.05	2.90

Source: NPWS Parks Visitor Surveys 2018-2020 – Visited a NPWS park in the last 4 weeks
Base: 2018 n=1,739; 2020 n=1,196

When segments were analysed by COVID-19/Bushfire periods (Chart 139) the most notable characteristic was the proportion of respondents who *could not be classified* to a segment. For the Bushfire period the proportion in 2018 and 2020 *not defined* was similar (3% and 4%). However for the COVID-19 Affected period the proportion *not defined* increased from 1% to 9% and for the COVID-19 Rebound period increased from 1% to 7%. This is primarily the result of the increase in the proportion who either undertook *none* of the specific activities used for the segmentation in the last 12 months or *couldn't say* which activities they had undertaken, but more importantly, they *couldn't say* whether they were open to an overnight visits to a NSW National park in the next 12 months. A segment could not be calculated for these respondents, so COVID-19 may have had an inadvertent impact on the segmentation model. Segments remained approximately the same size across each period.

Chart 139: Core Sub-segments by COVID-19 Bushfire Periods

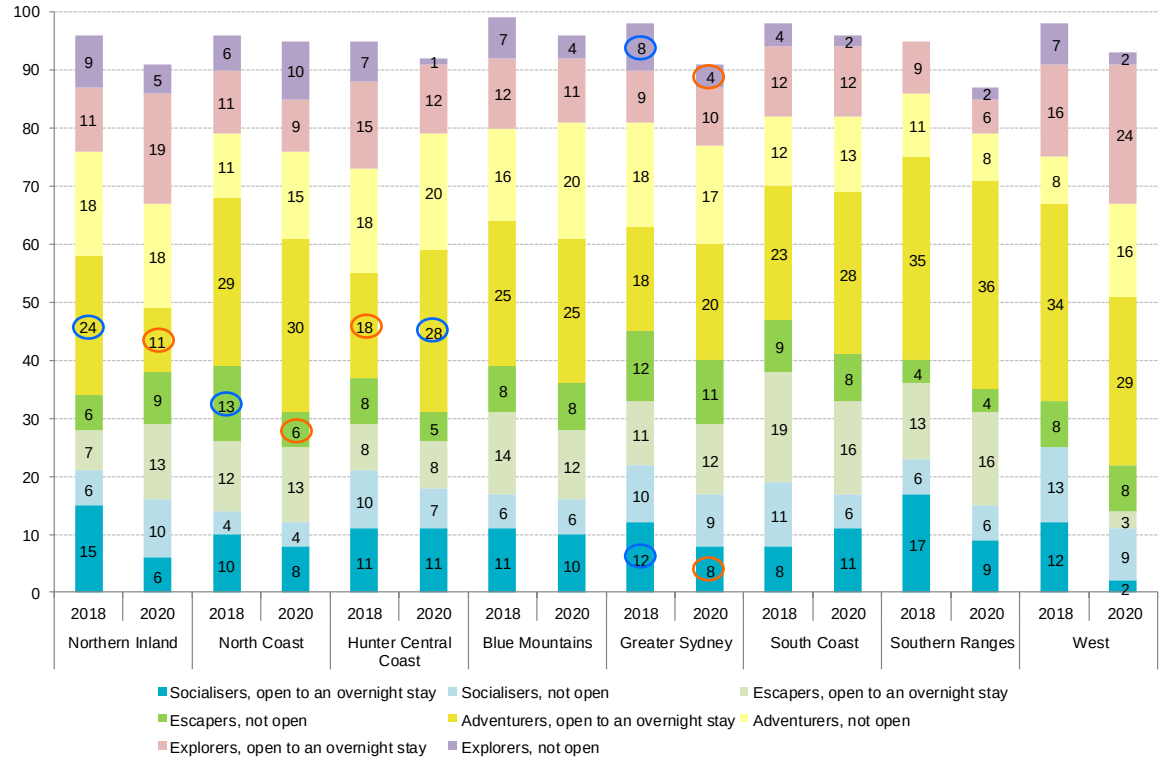


Source: NPWS Parks Visitor Surveys 2018-2020 – Visited a NPWS park in the last 4 weeks
Base: 2018 n=1,687; 2020 n=1,178
Those not defined to segments are excluded from the chart, but comprise the gap for the top of the column to 100%,

Significantly lower than the total
Significantly higher than the total

Adventurers open to an overnight stay remain the major sub-segment across all Branches in 2020, with the exception of Northern Inland Branch where the proportion significantly fell from 25% in 2018 to11% in 2020. The dominant segment for this Branch is now *Explorers open to an overnight stay* (19%). *Adventurers open to an overnight stay* increased their proportions in 2018 for most Branches, significantly so for the Hunter Central Coast Branch (from 18% to 28%). More detail can be found in Chart 140.

Chart 140: Core Sub-segments by NPWS Branch



Source: NPWS Parks Visitor Surveys 2018-2020 – Visited a NPWS park in the last 4 weeks
Base: 2018 n=1,687; 2020 n=1,178

Significantly lower than the total
Significantly higher than the total

10. APPENDIX – QUESTIONNAIRE

R10335 *NPWS - NATIONAL PARKS VISITOR MONITOR* 2020

STARTTIME

IF LANDLINE PHONE NUMBER, ASK:

Good [Morning/ Afternoon/ Evening]. I'm (SAY NAME) from Roy Morgan. We are currently conducting a study on behalf of the NSW Department of Planning, Industry and Environment about recreation and leisure. I would like to do a short interview with the youngest person in the household aged 18 years or older. Would that be you?

IF NO, SAY: May I please speak to the youngest person in the household aged 18 or more?

IF UNAVAILABLE, ARRANGE AN APPOINTMENT. IF UNABLE TO ARRANGE AN APPOINTMENT, CONTINUE AND SAY:
Could I please speak to the next youngest person living in the household aged 18 years or more?

IF NEXT YOUNGEST NOT AVAILABLE AND SPEAKER IS LIKELY TO BE 18 OR MORE, SAY: Then may I speak to you?

IF RESPONDENT ASKS HOW LONG THE SURVEY WILL TAKE, SAY: It will take about 5 minutes and will be used for research purposes only.

ENDIF

IF MOBILE PHONE NUMBER, ASK:

Good [Morning/ Afternoon/ Evening]. I'm (SAY NAME) from Roy Morgan. We are currently conducting a study on behalf of the NSW Department of Planning, Industry and Environment about recreation and leisure. I would like to do a short interview with you if you are aged 18 years or older. Are you aged 18 or over?

IF NO, SAY: Thank you for your time

IF RESPONDENT ASKS HOW LONG THE SURVEY WILL TAKE, SAY: It will take about 5 minutes and will be used for research purposes only.

ENDIF

[Single]

IF NECESSARY SAY: Is now a good time or would it be more convenient if I made an appointment to speak to you at another time?

IF NECESSARY, MAKE AN APPOINTMENT.

IF ASK WHO THE CLIENT, SAY: We are conducting this research on behalf of the NSW Office of

Environment & Heritage.

IF RESPONDENT ASKS FOR MORE INFO ABOUT THIS PROJECT OR ROY MORGAN, say: If you would like any more information about this project or Roy Morgan, you can phone us on 1800 337 332.

IF RESPONDENT HAS CONCERNS ABOUT PRIVACY ISSUES, say: If you are concerned about privacy issues or Roy Morgan's compliance with the Privacy Act, you can phone us on 1800 337 332 or access our privacy policy on our website www.roymorgan.com

IF NECESSARY: You can go to the website www.privacy.gov.au for further information.

1 CONTINUE

2 REFUSAL

IF REFUSAL/TERMINATION, ASK:

[Single]

REFQ. Before you go, can I ask you one short question? In the last 4 weeks, that is, SINCE [%DAY7] [%D7] [%M7], have you visited a park like a National Park in New South Wales?

IF RESPONDENT ASKS WHAT IS MEANT BY A PARK LIKE A NATIONAL PARK, SAY: I MEAN National Parks, State Conservation Areas, Nature Reserves, State Forests, or any other type of park, EXCLUDING local council parks. I DO NOT MEAN botanical gardens, zoos or wildlife parks.

1 YES

2 NO

3 CAN'T SAY

4 REFUSED

5 HUNG UP BEFORE QUESTION COULD BE ASKED

6 ANSWERING MACHINE

7 UNOBTAINABLE

[Single]

REGION. COMPUTED FROM SAMPLE

1 SYDNEY

2 REMAINDER NSW

3 ACT

4 MELBOURNE

5 REMAINDER VIC

6 BRISBANE

7 REMAINDER SOUTHERN QLD

IF LANDLINE PHONE NUMBER, ASK:

[Single]

QMPHONE. Do you personally have a mobile phone?

1	YES
2	NO
3	CAN'T SAY

IF CAN'T SAY IF HAVE A MOBILE PHONE (CODE 3 ON QMPHONE), SAY

Thank you for your time, but we need this information to continue with this survey.

REFQ WILL BE ASKED HERE

ENDIF

ENDIF

IF MOBILE PHONE NUMBER, ASK:

[Quantity] {Min: 800, Max: 9999, Default Value:9999}

QPCODE. What is the postcode where you live?
RECORD POSTCODE
IF DON'T KNOW OR CAN'T SAY, RECORD AS 9999.

IF DON'T KNOW OR CAN'T SAY POSTCODE (9999 ON QPCODE), SAY

Thank you for your time, but we need your postcode to continue with this survey.

REFQ WILL BE ASKED HERE

ENDIF

[Single]

QNEWREGION. POSTCODE RANGE REGION - COMPUTED FROM QPCODE

1	SYDNEY
2	REMAINDER NSW
3	ACT
4	MELBOURNE
5	REMAINDER VIC
6	BRISBANE

7 REMAINDER SOUTHERN QLD

8 OTHER REGION

IF FROM ANOTHER REGION (CODE 8 ON QNEWREGION), SAY:

Thank you for your time, but we need speak with people from specific regions of Australia.

REFQ WILL BE ASKED HERE

ENDIF

[Single]

QLLINE. Do live in a home that also has a landline telephone?

1 YES

2 NO

3 CAN'T SAY

IF CAN'T SAY IF HAVE A LANDLINE (CODE 3 ON QLLINE), SAY

Thank you for your time, but we need this information to continue with this survey.

REFQ WILL BE ASKED HERE

ENDIF

ENDIF

[Single]

REG. COMPUTED FROM QNEWREGION AND REGION FOR QUOTAS

1 SYDNEY

2 REMAINDER NSW

3 ACT

4 MELBOURNE

5 REMAINDER VIC

6 BRISBANE

7 REMAINDER SOUTHERN QLD

IF FROM ANOTHER REGION (CODE 8 ON QNEWREGION), SAY:

Thank you for your time, but we need speak with people from specific regions of

Australia.

REFQ WILL BE ASKED HERE

ENDIF

ENDIF

[Single]

REG. COMPUTED FROM QNEWREGION AND REGION FOR QUOTAS

1	SYDNEY
2	REMAINDER NSW
3	ACT
4	MELBOURNE
5	REMAINDER VIC
6	BRISBANE
7	REMAINDER SOUTHERN QLD

ASK ALL FROM SPECIFIC REGIONS (CODES 1 TO 7 ON QNEWREGION)

[Single]

QSEX. RECORD SEX OF RESPONDENT

1	MALE
2	FEMALE

Firstly, I'd like to ask you some questions about you and your household.

[Single]

QAGE. Would you mind telling me your approximate age please?

1	LESS THAN 18
2	18-24
3	25-29
4	30-34
5	35-39
6	40-44
7	45-49
8	50-54
9	55-59
10	60-64
11	65-69
12	70+
13	REFUSED

IF AGE REFUSED (CODE 13 AT QAGE), TERMINATE:

Thank you for your time and assistance. Unfortunately we need to be able to confirm your age to continue with this survey.

REFQ WILL BE ASKED HERE

ENDIF

[Single]

SEX BY AGE

1	Male 18-24
2	Male 25-34
3	Male 35-49
4	Male 50+
5	Female 18-24
6	Female 25-34
7	Female 35-49
8	Female 50+

IF QUOTA ACHIEVED, TERMINATE:

Thank you for your time and assistance, but we need to speak to people in different age groups.

REFQ WILL BE ASKED HERE

ENDIF

ASK EVERYONE

[Quantity] {Min: 0, Max: 99, Default Value:99}

QCHILDREN. How many children under 18 USUALLY live in this household? That is, the child lives or sleeps in this household for more than 50% of the time in a typical week.

IF NECESSARY : Having an understanding of your household structure determines what questions we need to ask you for this survey

INTERVIEWER NOTE: USUAL MEANS THE CHILD LIVES/SLEEPS IN THIS HOUSEHOLD FOR 4 OR MORE DAYS PER WEEK
RECORD NUMBER
INTERVIEWER NOTE: RECORD NO CHILDREN AS 0. RECORD CAN'T SAY/REFUSED AS 99.

IF NUMBER OF CHILDREN CAN'T SAY/REFUSED (99 AT QCHILDREN), SAY:

Thank you for your time and assistance. Unfortunately we need to be able to confirm the number of children under 18 living in the household to continue with this survey.

REFQ WILL BE ASKED HERE

ENDIF

ASK EVERYONE

[Single]

QHTS1. Thinking back over the last 12 months to your MOST RECENT HOLIDAY of one or more nights away from home. Was the holiday in...?
READ OUT

1	New South Wales
2	Another Australian State or Territory
3	Overseas
4	(DO NOT READ) DID NOT GO ON A HOLIDAY OF ONE OR MORE NIGHTS IN THE LAST 12 MONTHS
5	(DO NOT READ) CAN'T SAY

IF WENT ON A HOLIDAY IN LAST 12 MONTHS (CODES 1 TO 3 ON QHTS1). ASK:

[Single]

QHTS2. Was that holiday in the last 4 weeks?

IF NECESSARY, SAY: That is, SINCE [%DAY7] [%D7] [%M7]?

1	YES
2	NO
3	CAN'T SAY

ENDIF

IF INTERSTATE RESPONDENT AND HAS NOT SPECIFIED VISITED NSW IN THE LAST 4 WEEKS (CODES 3 TO 7 AT REGION OR QNEWREGION AND NOT CODE 1 ON QHTS1 AND CODE 1 ON QHTS2), ASK:

[Single]

QTRAVEL. Have you visited New South Wales within the last 4 weeks?

IF NECESSARY, SAY: That is, SINCE [%DAY7] [%D7] [%M7]?

1 YES

2 NO

3 CAN'T SAY

IF NOT VISITED NSW IN LAST 4 WEEKS OR CAN'T SAY (CODES 2 OR 3 AT QTRAVEL), SAY:

Thank you for your time and assistance. We are collecting information about the frequency of visits to NSW National Parks on behalf of the NSW Office of Environment and Heritage. This market research is carried out in compliance with the Privacy Act, and the information you have provided will be used only for research purposes.

If you would like any more information about this project or Roy Morgan, you can phone us on 1800 337 332.

IF CAN'T SAY (CODE 3 ON QTRAVEL), ASK:

REFQ WILL BE ASKED HERE

ENDIF

WILL INCREMENT QUOTAS, THIS IS A SHORT INTERVIEW

ENDIF

ENDIF

ASK EVERYONE

[Single]

QPARK. Thinking about PARKS anywhere at all in New South Wales, including the city or suburbs of Sydney. Have you visited any parks WITHIN THE LAST 4 WEEKS, that is, SINCE [%DAY7] [%D7] [%M7]? By parks, I mean National Parks, State Conservation Areas, Nature Reserves, State Forests, or any other type of park. I DON'T mean botanical gardens, zoos, wildlife parks, or any local council parks.

1 YES

2 NO

3 CAN'T SAY

ENDTIMEQPARK

TIMING1 - INTRODUCTION TO QPARK (ENDTIMEQPARK-STARTTIME)

IF NOT VISITED A PARK IN LAST 4 WEEKS OR CAN'T SAY (CODES 2 OR 3 AT QPARK), TERMINATE, SAY:

Thank you for your time and assistance. We are collecting information about the frequency of visits to NSW National Parks on behalf of the NSW Office of Environment and Heritage. This market research is carried out in compliance with the Privacy Act, and the information you have provided will be used only for research purposes.

If you would like any more information about this project or Roy Morgan, you can phone us on 1800 337 332

WILL INCREMENT QUOTAS, THIS IS A SHORT INTERVIEW

ENDIF

ASK ALL VISITED A PARK IN LAST 4 WEEKS (CODE 1 AT QPARK)

STARTTIMEQ1

[Single] {Sort}

Q1. What is the NAME of the National Park, State Conservation Area, Nature Reserve, State Forest or other park you visited MOST RECENTLY in NEW SOUTH WALES in the past 4 weeks, that is, SINCE [%DAY7] [%D7] [%M7]?

Remember the park must be in NSW.

IF NECESSARY SAY: By parks I DO NOT MEAN botanical gardens, zoos, wildlife parks, or any local council parks.

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

1		ABBEY CREEK (CROWDY BAY)
3857		LAKE CANOBOLAS
9997	Fixed Openend	OTHER (SPECIFY)
9998	Fixed	CAN'T SAY

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

ENDTIMEQ1

TIMING2 - Q1 (ENDTIMEQ1-STARTTIMEQ1)

IF A PARK NAME CAN BE EITHER A OEH MANAGED PARK OR SOME OTHER PARK (CODES 2001 TO 2049 ON Q1), ASK:

STARTTIMEQ1N1

ONLY OEH OR OTHER PARK FOR PARK NAMED WILL APPEAR IN Q1N1

[Single]

Q1N1. #/Was that Boat Harbour Aquatic Reserve or Boat Harbour Tomaree/Was that /#201.#/, or // #202.?

1021		BANYABBA NATURE RESERVE AND STATE CONSERVATION AREA
3690		MILLEWA STATE FOREST
9998	Fixed	CAN'T SAY

ENDTIMEQ1N1

TIMING3 - Q1N1 (ENDTIMEQ1N1-STARTTIMEQ1N1)

ENDIF

IF CAN'T SAY PARK NAME (CODE 9998 AT Q1 OR Q1N1), ASK:

STARTTIMEQ2

[Multiple] {Spread:20 Sort}

Q2. Where was the park located? What town or suburb was it close to?

IF MENTIONS 2 TOWNS, PLEASE TYPE IN FIRST MENTION. IF UNSUCCESSFUL, PLEASE THEN TYPE IN SECOND MENTION. IF UNSUCCESSFUL, PLEASE SELECT 2ND MENTION AS OTHER SPECIFY AND CONTINUE
HIGHLIGHT ALL MENTIONED

1		ABBOTSBURY
↓		↓
489		SAMURI BEACH
997	Fixed Openend	OTHER (SPECIFY)
998	Fixed Single	CAN'T SAY

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

IF GAVE NAME OF SUBURB OR TOWN NOT JERVIS BAY (CODES 1 TO 217 OR 219 TO 472 OR 476 TO 489 ON Q2) AND HAS NOT SPECIFIED A PARK NAME (NOT CODES 2001 TO 2047 ON Q1), ASK:

ONLY PARKS FROM SUBURB OR TOWN MENTIONED IN Q2 WILL APPEAR IN Q2B

[Single] {Sort}

Q2B. Would it have been...?
READ OUT

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

1	Abbey Creek (Crowdy Bay)
↓	↓
3857	Lake Canobolas

9997	Fixed Openend	(DO NOT READ) OTHER (SPECIFY)
9998	Fixed	(DO NOT READ) CAN'T SAY

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

ENDIF

ENDTIMEQ2

TIMING4 - Q2 TO Q2B (ENDTIMEQ2-STARTTIMEQ2)

IF STILL CAN'T SAY PARK NAME (CODE 9997 OR 9998 AT Q2B), OR STILL CAN'T NOMINATE TOWN AND HAS NOT SPECIFIED A PARK NAME (CODE 998 AT Q2 AND NOT CODES 2001 TO 2047 AT Q1 OR CODE 997 AT Q2), ASK:

STARTTIMEQ3

[Single]

Q3. Was the park a National Park, a State Conservation Area or a Nature Reserve, or was it a State Forest or some other type of park?

1	NATIONAL PARK, STATE CONSERVATION AREA OR NATURE RESERVE
2	STATE FOREST OR SOME OTHER PARK
3	CAN'T SAY

ENDTIMEQ3

TIMING5 - Q3 (ENDTIMEQ3-STARTTIMEQ3)

ENDIF

ENDIF

IF PARK OR TOWN MENTIONED IS JERVIS BAY (CODE 457 ON Q1 OR CODE 218 ON Q2) OR TOWN MENTIONED IS NOWRA OR ULLADULLA AND PARK IS JERVIS BAY (CODES 318 OR 408 ON Q2 AND CODE 457 ON Q2B), ASK:

[Single]

Q1JB. Was the park located on the land that is part of the ACT known as Booderee National Park, next to the Jervis Bay Naval facility (HMAS Creswell) and village, Lake Windermere, the Botanic Gardens and the Wreck Bay Aboriginal Community OR was it the park that is near Huskisson, Vincentia, Hyams Beach, Erowal Bay, Calalla Bay, Calalla

Beach or Culburra Beach known as Jervis Bay National Park? Please note that Booderee National Park used to be known as Jervis Bay National Park.

457	JERVIS BAY NATIONAL PARK
3070	BOODEREE NATIONAL PARK
9998	CAN'T SAY

ENDIF

IF TOWN IS VINCENTIA, HYAMS BEACH, EROWAL BAY (CODES 473 TO 475 ON Q2), CODE AS JERVIS BAY NATIONAL PARK ON Q1JB

ENDIF

IF PARK NAME OTHER (CODE 9997 AT Q1), ASK:

STARTTIMEQ4

[Single] {Sort}

Q4. Where was the park located? What town or suburb was it close to?

1		ABBOTSBURY
489		SAMURI BEACH
997	Fixed Openend	OTHER (SPECIFY)
998	Fixed Single	CAN'T SAY

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

[Single]

Q3A. Was the park a National Park, a State Conservation Area or a Nature Reserve, or was it a State Forest or some other type of park?

1	NATIONAL PARK, STATE CONSERVATION AREA OR NATURE RESERVE
2	STATE FOREST OR SOME OTHER PARK
3	CAN'T SAY

ENDTIMEQ4

TIMING6 - Q4 (ENDTIMEQ4-STARTTIMEQ4)

ENDIF

IF MOST RECENT VISITED PARK IS OEH/ NPWS (CODES 1 TO 1070 OR 1400 TO 1499 ON Q1 OR CODE 1 ON Q3 OR Q3A) OR UNKNOWN (CODE 9997 ON Q2B OR CODE 997 ON Q2 OR CODE 3 ON Q3 OR Q3A OR CODE 9998 ON Q1N1), ASK:

STARTTIMEQ5

[Quantity] {Min: 1, Max: 99, Default Value:99}

Q5. How many times did you visit [%PARK_NAME] in the last 4 weeks, that is, SINCE [%DAY7] [%D7] [%M7]?
RECORD NUMBER

INTERVIEWER NOTE: RECORD CAN'T SAY/REFUSED AS 99

IF NUMBER OF VISITS 10 OR MORE (>9 ON Q5), ASK:

[Single]

Q5A. That's a large number of visits over the last 4 weeks, is [%Q5] visits correct?

IF NECESSARY, SAY: That is, SINCE [%DAY7] [%D7] [%M7]?

1 YES - NUMBER OF VISITS CONFIRMED

2 NO - NUMBER TO BE AMENDED

IF NUMBER OF VISITS TO BE AMENDED (CODE 2 ON Q5A), WILL GO BACK TO Q5

ENDIF

ENDIF

IF ONE VISIT ONLY (Q5=1), ASK:

[Quantity] {Min: 0, Max: 99, Default Value:99}

Q6. How many children under 18 IN TOTAL visited [%PARK_NAME] with you on this visit?
RECORD NUMBER

INTERVIEWER NOTE: RECORD NO CHILDREN AS 0. RECORD CAN'T SAY/ REFUSED AS 99

IF NUMBER OF CHILDREN 5 OR MORE (Q6>4), ASK:

[Single]

Q6A. That's a large number of children, is [%Q6] correct?

1	YES - NUMBER OF CHILDREN CONFIRMED
2	NO - NUMBER TO BE AMENDED

IF NUMBER OF CHILDREN TO BE AMENDED (CODE 2 ON Q6A), WILL GO BACK TO Q6

ENDIF

ENDIF

IF NUMBER OF CHILDREN IN VISIT IS GREATER THAN NUMBER OF CHILDREN IN HOUSEHOLD (Q6 > QCHILDREN), ASK:

[Multiple]

Q6B. On this visit, were the extra children that don't usually live in your household either...?
READ OUT

1	Single	Under Your Care Or The Care Of Another Adult Who Lives In Your Household
2	Single	OR Were They In The Care Of An Adult That Doesn't Live In Your Household
3	Single	(DO NOT READ) CAN'T SAY

ENDIF

ENDIF

IF MORE THAN ONE VISIT (Q5>1), ASK:

[Quantity] {Min: 0, Max: 99, Default Value:99}

Q7. On your MOST RECENT visit to [%PARK_NAME], how many children under 18 visited with you IN TOTAL?
RECORD NUMBER

INTERVIEWER NOTE: RECORD NO CHILDREN AS 0. RECORD CAN'T SAY/REFUSED AS 99

IF NUMBER OF CHILDREN 5 OR MORE (Q7>4), ASK:

[Single]

Q7A. That's a large number of children, is [%Q7] correct?

1	YES - NUMBER OF CHILDREN CONFIRMED
2	NO - NUMBER TO BE AMENDED

IF NUMBER OF CHILDREN TO BE AMENDED (CODE 2 ON Q7A), WILL GO BACK TO Q7

ENDIF

ENDIF

IF NUMBER OF CHILDREN IN VISIT IS GREATER THAN NUMBER OF CHILDREN IN HOUSEHOLD (Q7 > QCHILDREN), ASK:

[Multiple]

Q7B. On this visit, were the extra children that don't usually live in your household either...?
READ OUT

1	Single	Under Your Care Or The Care Of Another Adult Who Lives In Your Household
2	Single	OR Were They In The Care Of An Adult That Doesn't Live In Your Household
3	Single	(DO NOT READ) CAN'T SAY

ENDIF

ENDIF

[Quantity] {Min: 0, Max: 999}

DQ567. DUMMY VARIABLE COMPUTED - Q5*Q6 OR Q5*Q7

IF Q5 x (Q6 OR Q7) > 28, SAY:

[Single]

Q567. To calculate the number of children in your party that visited this park in the last 4 weeks we multiply the number of visits YOU made to this park by the number of children that visited with you on YOUR MOST RECENT VISIT. We calculate this to be [%DQ567] child visits in total over the last 4 weeks. Would this be approximately correct?

1 YES

2 NO

3 CAN'T SAY

IF NO OR CANT SAY (CODES 2 OR 3 ON Q567), SAY:

[Multiple] {Spread:10 }

Q567B. Could you please explain why this estimated figure is not correct?

INTERVIEWER RECORD RESPONSES IN FULL

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

97 Openend OTHER (SPECIFY)

98 Single CAN'T SAY

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

ENDIF

ENDIF

ENDTIMEQ5

TIMING7 - Q5 TO Q7B (ENDTIMEQ5-STARTTIMEQ5)

IF MOST RECENT VISITED PARK IS OEH/ NPWS (CODES 1 TO 1070 OR 1400 TO 1499 ON Q1 OR CODE 1 ON Q3 OR Q3A) OR UNKNOWN (CODE 9997 ON Q2B OR CODE 997 ON Q2 OR CODE 3 ON Q3 OR Q3A OR CODE 9998 ON Q1N1), ASK:

STARTTIMEQ8

[Multiple] {Spread:10 }

Q8. What ACTIVITIES did you undertake during your MOST RECENT visit to [%PARK_NAME]?

HIGHLIGHT ALL MENTIONED

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

1		ABORIGINAL HERITAGE APPRECIATION
68		OTHER WATER-BASED RECREATION
97	Openend	OTHER (SPECIFY)
98	Single	CAN'T SAY
99	Single	NONE/ NO OTHER ACTIVITY

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

ENDTIMEQ8

TIMING8 - Q8 (ENDTIMEQ8-STARTTIMEQ8)

STARTTIMEQ9

IF WALKING/BUSHWALKING AND/OR WALKING THE DOG (CODES 61 TO 62 ON Q8), ASK:

[Single]

1	LESS THAN AN HOUR
2	UP TO HALF A DAY (FOUR HOURS APPROX.)
3	UP TO ONE DAY (EIGHT HOURS APPROX.)
4	MULTI DAY WALK
5	CAN'T SAY/CAN'T RECALL

IF MOST RECENT VISITED PARK IS OEH/ NPWS (CODES 1 TO 1070 OR 1400 TO 1499 ON Q1 OR CODE 1 ON Q3 OR Q3A) OR UNKNOWN (CODE 9997 ON Q2B OR CODE 997 ON Q2 OR CODE 3 ON Q3 OR Q3A OR CODE 9998 ON Q1N1), ASK:

[Single]

Q9. Thinking about your most recent visit to [%PARK_NAME], how satisfied were you with your experience of the park? Were you #/very satisfied, satisfied, neither satisfied nor dissatisfied, dissatisfied or very dissatisfied/ very dissatisfied, dissatisfied, neither dissatisfied nor satisfied, satisfied or very satisfied/?

1	VERY SATISFIED
2	SATISFIED
3	NEITHER SATISFIED NOR DISSATISFIED
4	DISSATISFIED
5	VERY DISSATISFIED
6	CAN'T SAY

[Single]

QDN1. On this occasion was your visit to this park just for the day or did ou stay in it overnight or for multiple nights ?

1	JUST FOR THE DAY
2	OVERNIGHT
3	MULTIPLE NIGHTS
4	CAN'T SAY/CAN'T RECALL

[Single]

QVISPART1. Was visiting this park … ?
READ OUT

1	Part of regular daily, weekly or monthly rountine
2	Part of a larger/bigger day trip
3	Part of a larger/bigger overnight visit or multi-day trip
4	(DO NOT READ) FOR SOME OTHER REASON
5	(DO NOT READ) CAN'T SAY

[Single]

QVISRESN1. Was visiting this park … ?
READ OUT

1	The only reason for your trip (100% of the trip purpose or intention)
2	The main reason for your trip (75% of the trip prupose or intention)
3	One of the main reasons for your trip (50% of the trip prupose or intention)
4	A minor reason for your trip (25% of the trip prupose or intention)
5	Not ine of the reasons for your trip (0% of the trip prupose or intention)
6	(DO NOT READ) CAN'T SAY

ENDTIMEQ9

TIMING9 - Q9 (ENDTIMEQ9-STARTTIMEQ9)

ENDIF

ENDTIMEQ1-Q9

TIMING10 - Q1 TO Q9 (ENDTIMEQ1-Q9-STARTTIMEQ1)

ASK ALL VISITED A PARK IN LAST 4 WEEKS (CODE 1 AT QPARK)

STARTTIMEQ10A

[Single] {Sort}

Q10A. What is the NAME of ANOTHER National Park, State Conservation Area, Nature Reserve, State Forest or other park you visited in NEW SOUTH WALES in the past 4 weeks?

IF NECESSARY, SAY: That is, SINCE [%DAY7] [%D7] [%M7]?

Remember the park must be in NSW.

IF NECESSARY SAY: By parks I DO NOT MEAN botanical gardens, zoos, wildlife parks, or any local suburban or town parks.

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

1		ABBEY CREEK (CROWDY BAY)
↓		↓
3857		LAKE CANOBOLAS
9997	Fixed Openend	OTHER (SPECIFY)
9998	Fixed	CAN'T SAY
9999	Fixed	NONE/ NO OTHER PARK

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

IF A PARK NAME CAN BE EITHER A OEH MANAGED PARK OR SOME OTHER PARK (CODES 2001 TO 2049 ON Q10A.), ASK:

ONLY OEH OR OTHER PARK FOR PARK NAMED WILL APPEAR IN Q10NA.

[Single] {Sort}

Q10NA. #/Was that Boat Harbour Aquatic Reserve or Boat Harbour Tomaree/Was that /#201.#/, or //#202.?

1021		BANYABBA NATURE RESERVE AND STATE CONSERVATION AREA
↓		↓
3690		MILLEWA STATE FOREST
9998	Fixed	CAN'T SAY

ENDIF

IF CAN'T SAY PARK NAME (CODE 9998 AT Q10A. OR Q10NA.), ASK:

[Multiple] {Spread:10 Sort}

Q11AA. Where was the park located? What town or suburb was it close to?

IF MENTIONS 2 TOWNS, PLEASE TYPE IN FIRST MENTION. IF UNSUCCESSFUL, PLEASE THEN TYPE IN SECOND MENTION. IF UNSUCCESSFUL, PLEASE SELECT 2ND MENTION AS OTHER SPECIFY AND CONTINUE
HIGHLIGHT ALL MENTIONED

1		ABBOTSBURY
489		SAMURI BEACH
997	Fixed Openend	OTHER (SPECIFY)
998	Fixed Single	CAN'T SAY

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

IF GAVE NAME OF SUBURB OR TOWN NOT JERVIS BAY (CODES 1 TO 217 OR 219 TO 472 OR 476 TO 489 ON Q11AA.) AND HAS NOT SPECIFIED A PARK NAME (NOT CODES 2001 TO 2047 ON Q10A.), ASK:

ONLY PARKS FROM SUBURB OR TOWN MENTIONED IN Q11AA. WILL APPEAR IN Q11AB.

[Single] {Sort}

Q11AB. Would it have been...?
READ OUT

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

1		Abbey Creek (Crowdy Bay)
3857		Lake Canobolas
9997	Fixed Openend	(DO NOT READ) OTHER (SPECIFY)
9998	Fixed	(DO NOT READ) CAN'T SAY

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

ENDIF

IF STILL CAN'T SAY PARK NAME (CODE 9997 OR 9998 AT Q11AB.) OR STILL

CAN'T NOMINATE TOWN AND HAS NOT SPECIFIED A PARK NAME (CODE 998 AT Q11AA. AND NOT CODES 2001 TO 2047 AT Q10A. OR CODE 997 AT Q11AA.), ASK:

[Single]

Q12A. Was the park a National Park, a State Conservation Area or a Nature Reserve, or was it a State Forest or some other type of park?

1	NATIONAL PARK, STATE CONSERVATION AREA OR NATURE RESERVE
2	STATE FOREST OR SOME OTHER PARK
3	CAN'T SAY

ENDIF

ENDIF

IF PARK OR TOWN MENTIONED IS JERVIS BAY (CODE 457 ON Q10A. OR CODE 218 ON Q11AA.) OR TOWN MENTIONED IS NOWRA OR ULLADULLA AND PARK IS JERVIS BAY (CODES 318 OR 408 ON Q11AA. AND CODE 457 ON Q11AB.), ASK:

[Single]

QAJB. Was the park located on the land that is part of the ACT known as Booderee National Park, next to the Jervis Bay Naval facility (HMAS Creswell) and village, Lake Windermere, the Botanic Gardens and the Wreck Bay Aboriginal Community OR was it the park that is near Huskisson, Vincentia, Hyams Beach, Erowal Bay, Calalla Bay, Calalla Beach or Culburra Beach known as Jervis Bay National Park? Please note that Booderee National Park used to be known as Jervis Bay National Park.

457	JERVIS BAY NATIONAL PARK
3070	BOODEREE NATIONAL PARK
9998	CAN'T SAY

ENDIF

IF TOWN IS VINCENTIA, HYAMS BEACH, EROWAL BAY (CODES 473 TO 475 ON Q11AA.), CODE AS JERVIS BAY NATIONAL PARK ON QAJB.

ENDIF

IF PARK NAME OTHER (CODE 9997 AT Q10A.), ASK:

[Single] {Sort}

Q13A. Where was the park located? What town or suburb was it close to?

1	ABBOTSBURY

489		SAMURI BEACH
997	Fixed Openend	OTHER (SPECIFY)
998	Fixed Single	CAN'T SAY

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

[Single]

Q12AA. Was the park a National Park, a State Conservation Area or a Nature Reserve, or was it a State Forest or some other type of park?

1	NATIONAL PARK, STATE CONSERVATION AREA OR NATURE RESERVE
2	STATE FOREST OR SOME OTHER PARK
3	CAN'T SAY

ENDIF

IF MOST RECENT VISITED PARK IS OEH/ NPWS (CODES 1 TO 1070 OR 1400 TO 1499 ON Q10A. OR CODE 1 ON Q12A. OR Q12AA.) OR UNKNOWN (CODE 9997 ON Q11AB. OR CODE 997 ON Q11AA. OR CODE 3 ON Q12A. OR Q12AA.), ASK:

[Quantity] {Min: 1, Max: 99, Default Value:99}

Q14A. How many times did you visit [%PARK_NAMEA] in the last 4 weeks, that is, SINCE [%DAY7] [%D7] [%M7]?
RECORD NUMBER

INTERVIEWER NOTE: RECORD CAN'T SAY/REFUSED AS 99

IF NUMBER OF VISITS 10 OR MORE (>9 ON Q14A.), ASK:

[Single]

Q14AA. That's a large number of visits over the last 4 weeks, is [%Q14A] visits correct?

IF NECESSARY, SAY: That is, SINCE [%DAY7] [%D7] [%M7]?

1 YES - NUMBER OF VISITS CONFIRMED

2 NO - NUMBER TO BE AMENDED

IF NUMBER OF VISITS TO BE AMENDED (CODE 2 ON Q14AA.), WILL GO BACK TO Q14A.

ENDIF

ENDIF

IF ONE VISIT ONLY (Q14A.=1), ASK:

[Quantity] {Min: 0, Max: 99, Default Value:99}

Q15A. How many children under 18 IN TOTAL visited [%PARK_NAMEA] with you on this visit?
RECORD NUMBER

INTERVIEWER NOTE: RECORD NO CHILDREN AS 0. RECORD CAN'T SAY/ REFUSED AS 99

IF NUMBER OF CHILDREN 5 OR MORE (Q15A.>4), ASK:

[Single]

Q15AA. That's a large number of children, is [%Q15A] correct?

1 YES - NUMBER OF CHILDREN CONFIRMED

2 NO - NUMBER TO BE AMENDED

IF NUMBER OF CHILDREN TO BE AMENDED (CODE 2 ON Q15AA.), WILL GO BACK TO Q15A.

ENDIF

ENDIF

IF NUMBER OF CHILDREN IN VISIT IS GREATER THAN NUMBER OF CHILDREN IN HOUSEHOLD (Q15A. > QCHILDREN), ASK:

[Multiple]

Q15AB. On this visit, were the extra children that don't usually live in your household either...?
READ OUT

1	Single	Under Your Care Or The Care Of Another Adult Who Lives In Your Household
2	Single	OR Were They In The Care Of An Adult That Doesn't Live In Your Household
3	Single	(DO NOT READ) CAN'T SAY

ENDIF

ENDIF

IF MORE THAN ONE VISIT (Q14A.>1), ASK:

[Quantity] {Min: 0, Max: 99, Default Value:99}

Q16A. On your MOST RECENT visit to [%PARK_NAMEA], how many children under 18 visited with you IN TOTAL?
RECORD NUMBER

INTERVIEWER NOTE: RECORD NO CHILDREN AS 0. RECORD CAN'T SAY/REFUSED AS 99

IF NUMBER OF CHILDREN 5 OR MORE (Q16A. > 4), ASK:

[Single]

Q16AA. That's a large number of children, is [%Q16A] correct?

1	YES - NUMBER OF CHILDREN CONFIRMED
2	NO - NUMBER TO BE AMENDED

IF NUMBER OF CHILDREN TO BE AMENDED (CODE 2 ON Q16AA.), WILL GO BACK TO Q16A.

ENDIF

ENDIF

IF NUMBER OF CHILDREN IN VISIT IS GREATER THAN NUMBER OF CHILDREN IN HOUSEHOLD (Q16A. > QCHILDREN), ASK:

[Multiple]

Q16AB. On this visit, were the extra children that don't usually live in your household either...?
READ OUT

1	Single	Under Your Care Or The Care Of Another Adult Who Lives In Your Household
2	Single	OR Were They In The Care Of An Adult That Doesn't Live In Your Household
3	Single	(DO NOT READ) CAN'T SAY

ENDIF

ENDIF

[Quantity] {Min: 0, Max: 999}

DUMMY VARIABLE COMPUTED - Q14A.*Q15A. OR Q14A.*Q16A.

IF Q14A. x (Q15A. OR Q16A.) > 28, SAY:

[Single]

Q14AB. To calculate the number of children in your party that visited this park in the last 4 weeks we multiply the number of visits YOU made to this park by the number of children that visited with you on YOUR MOST RECENT VISIT. We calculate this to be [%DQ14A] child visits in total over the last 4 weeks. Would this be approximately correct?

1	YES
2	NO
3	CAN'T SAY

IF NO OR CANT SAY (CODES 2 OR 3 ON Q14AB.), SAY:

[Multiple] {Spread:10 }

Q14AC. Could you please explain why this estimated figure is not correct?

INTERVIEWER RECORD RESPONSES IN FULL

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

97 Openend OTHER (SPECIFY)

98 Single CAN'T SAY

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

ENDIF

ENDIF

[Single]

QDN2. On this occasion was your visit to this park just for the day or did ou stay in it overnight or for multiple nights ?

1 JUST FOR THE DAY

2 OVERNIGHT

3 MULTIPLE NIGHTS

4 CAN'T SAY/CAN'T RECALL

[Single]

QVISPART2. Was visiting this park … ?
READ OUT

1 Part of regular daily, weekly or monthly rountine

2 Part of a larger/bigger day trip

3 Part of a larger/bigger overnight visit or multi-day trip

4 (DO NOT READ) FOR SOME OTHER REASON

5 (DO NOT READ) CAN'T SAY

[Single]

QVISRESN2. Was visiting this park … ?
READ OUT

1 The only reason for your trip (100% of the trip purpose or intention)

2 The main reason for your trip (75% of the trip prupose or intention)

3 One of the main reasons for your trip (50% of the trip prupose or intention)

4 A minor reason for your trip (25% of the trip prupose or intention)

5 Not ine of the reasons for your trip (0% of the trip prupose or intention)

6 (DO NOT READ) CAN'T SAY

ENDIF

ENDTIMEQ10A

TIMING11 - Q10A TO Q16AB (ENDTIMEQ10A-STARTTIMEQ10A)

IF VISITING 2 PARKS (CODES 1 TO 9998 ON Q10A), ASK:

STARTTIMEQ10B

[Single] {Sort}

Q10B. What is the NAME of ANOTHER National Park, State Conservation Area, Nature Reserve, State Forest or other park you visited in NEW SOUTH WALES in the past 4 weeks?

IF NECESSARY, SAY: That is, SINCE [%DAY7] [%D7] [%M7]?

Remember the park must be in NSW.

IF NECESSARY SAY: By parks I DO NOT MEAN botanical gardens, zoos, wildlife parks, or any local suburban or town parks.

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

1		ABBEY CREEK (CROWDY BAY)
↓		↓
3857		LAKE CANOBOLS
9997	Fixed Openend	OTHER (SPECIFY)
9998	Fixed	CAN'T SAY
9999	Fixed	NONE/ NO OTHER PARK

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

IF A PARK NAME CAN BE EITHER A OEH MANAGED PARK OR SOME OTHER PARK (CODES 2001 TO 2049 ON Q10B.), ASK:

ONLY OEH OR OTHER PARK FOR PARK NAMED WILL APPEAR IN Q10NB.

[Single] {Sort}

Q10NB. #/Was that Boat Harbour Aquatic Reserve or Boat Harbour Tomaree/Was that /#201.#/, or //#202.?

1021		BANYABBA NATURE RESERVE AND STATE CONSERVATION AREA
3690		MILLEWA STATE FOREST
9998	Fixed	CAN'T SAY

ENDIF

IF CAN'T SAY PARK NAME (CODE 9998 AT Q10B. OR Q10NB.), ASK:

[Multiple] {Spread:10 Sort}

Q11BA. Where was the park located? What town or suburb was it close to?

IF MENTIONS 2 TOWNS, PLEASE TYPE IN FIRST MENTION. IF UNSUCCESSFUL, PLEASE THEN TYPE IN SECOND MENTION. IF UNSUCCESSFUL, PLEASE SELECT 2ND MENTION AS OTHER SPECIFY AND CONTINUE
HIGHLIGHT ALL MENTIONED

1		ABBOTSBURY
↓		↓
489		SAMURI BEACH
997	Fixed Openend	OTHER (SPECIFY)
998	Fixed Single	CAN'T SAY

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

IF GAVE NAME OF SUBURB OR TOWN NOT JERVIS BAY (CODES 1 TO 217 OR 219 TO 472 OR 476 TO 489 ON Q11BA.) AND HAS NOT SPECIFIED A PARK NAME (NOT CODES 2001 TO 2047 ON Q10B.), ASK:

ONLY PARKS FROM SUBURB OR TOWN MENTIONED IN Q11BA. WILL APPEAR IN Q11BB.

[Single] {Sort}

Q11BB. Would it have been...?
READ OUT

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

1		Abbey Creek (Crowdy Bay)
↓		↓
3857		LAKE CANOBOLAS
9997	Fixed Openend	(DO NOT READ) OTHER (SPECIFY)
9998	Fixed	(DO NOT READ) CAN'T SAY

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

ENDIF

IF STILL CAN'T SAY PARK NAME (CODE 9997 OR 9998 AT Q11BB.) OR STILL CAN'T NOMINATE TOWN AND HAS NOT SPECIFIED A PARK NAME (CODE 998 AT Q11BA. AND NOT CODES 2001 TO 2047 AT Q10B. OR CODE 997 AT Q11BA.), ASK:

[Single]

Q12B. Was the park a National Park, a State Conservation Area or a Nature Reserve, or was it a State Forest or some other type of park?

1	NATIONAL PARK, STATE CONSERVATION AREA OR NATURE RESERVE
2	STATE FOREST OR SOME OTHER PARK
3	CAN'T SAY

ENDIF

ENDIF

IF PARK OR TOWN MENTIONED IS JERVIS BAY (CODE 457 ON Q10B. OR CODE 218 ON Q11BA.) OR TOWN MENTIONED IS NOWRA OR ULLADULLA AND PARK IS JERVIS BAY (CODES 318 OR 408 ON Q11BA. AND CODE 457 ON Q11BB.), ASK:

[Single]

QBJB. Was the park located on the land that is part of the ACT known as Booderee National Park, next to the Jervis Bay Naval facility (HMAS Creswell) and village, Lake Windermere, the Botanic Gardens and the Wreck Bay Aboriginal Community OR was it the park that is near Huskisson, Vincentia, Hyams Beach, Erowal Bay, Calalla Bay, Calalla Beach or Culburra Beach known as Jervis Bay National Park? Please note that Booderee National Park used to be known as Jervis Bay National Park.

457	JERVIS BAY NATIONAL PARK
3070	BOODEREE NATIONAL PARK
9998	CAN'T SAY

ENDIF

IF TOWN IS VINCENTIA, HYAMS BEACH, EROWAL BAY (CODES 473 TO 475 ON Q11BA.), CODE AS JERVIS BAY NATIONAL PARK ON QBJB.

ENDIF

IF PARK NAME OTHER (CODE 9997 AT Q10B.), ASK:

[Single] {Sort}

Q13B. Where was the park located? What town or suburb was it close to?

1		ABBOTSBURY
↓		↓
489		SAMURI BEACH
997	Fixed Openend	OTHER (SPECIFY)
998	Fixed Single	CAN'T SAY

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

[Single]

Q12BA. Was the park a National Park, a State Conservation Area or a Nature Reserve, or was it a State Forest or some other type of park?

1	NATIONAL PARK, STATE CONSERVATION AREA OR NATURE RESERVE
2	STATE FOREST OR SOME OTHER PARK
3	CAN'T SAY

ENDIF

IF MOST RECENT VISITED PARK IS OEH/ NPWS (CODES 1 TO 1070 OR 1400 TO 1499 ON Q10B. OR CODE 1 ON Q12B. OR Q12BA.) OR UNKNOWN (CODE 9997 ON Q11BB. OR CODE 997 ON Q11BA. OR CODE 3 ON Q12B. OR Q12BA.), ASK:

[Quantity] {Min: 1, Max: 99, Default Value:99}

Q14B. How many times did you visit [%PARK_NAMEB] in the last 4 weeks, that is, SINCE [%DAY7] [%D7] [%M7]?
RECORD NUMBER

INTERVIEWER NOTE: RECORD CAN'T SAY/REFUSED AS 99

IF NUMBER OF VISITS 10 OR MORE (>9 ON Q14B.), ASK:

[Single]

Q14BA. That's a large number of visits over the last 4 weeks, is [%Q14B] visits correct?

IF NECESSARY, SAY: That is, SINCE [%DAY7] [%D7] [%M7]?

1	YES - NUMBER OF VISITS CONFIRMED
2	NO - NUMBER TO BE AMENDED

IF NUMBER OF VISITS TO BE AMENDED (CODE 2 ON Q14BA.), WILL GO BACK TO Q14B.

ENDIF

ENDIF

IF ONE VISIT ONLY (Q14B.=1), ASK:

[Quantity] {Min: 0, Max: 99, Default Value:99}

Q15B. How many children under 18 IN TOTAL visited [%PARK_NAMEB] with you on this visit?
RECORD NUMBER

INTERVIEWER NOTE: RECORD NO CHILDREN AS 0. RECORD CAN'T SAY/ REFUSED AS 99

IF NUMBER OF CHILDREN 5 OR MORE (Q15B.>4), ASK:

[Single]

Q15BA. That's a large number of children, is [%Q15B] correct?

1	YES - NUMBER OF CHILDREN CONFIRMED
2	NO - NUMBER TO BE AMENDED

IF NUMBER OF CHILDREN TO BE AMENDED (CODE 2 ON Q15BA.), WILL GO BACK TO Q15B.

ENDIF

ENDIF

IF NUMBER OF CHILDREN IN VISIT IS GREATER THAN NUMBER

OF CHILDREN IN HOUSEHOLD (Q15B. > QCHILDREN), ASK:

[Multiple]

Q15BB. On this visit, were the extra children that don't usually live in your household either...?
READ OUT

1	Single	Under Your Care Or The Care Of Another Adult Who Lives In Your Household
2	Single	OR Were They In The Care Of An Adult That Doesn't Live In Your Household
3	Single	(DO NOT READ) CAN'T SAY

ENDIF

ENDIF

IF MORE THAN ONE VISIT (Q14B.>1), ASK:

[Quantity] {Min: 0, Max: 99, Default Value:99}

Q16B. On your MOST RECENT visit to [%PARK_NAMEB], how many children under 18 visited with you IN TOTAL?
RECORD NUMBER

INTERVIEWER NOTE: RECORD NO CHILDREN AS 0. RECORD CAN'T SAY/REFUSED AS 99

IF NUMBER OF CHILDREN 5 OR MORE (Q16B. > 4), ASK:

[Single]

Q16BA. That's a large number of children, is [%Q16B] correct?

1	YES - NUMBER OF CHILDREN CONFIRMED
2	NO - NUMBER TO BE AMENDED

IF NUMBER OF CHILDREN TO BE AMENDED (CODE 2 ON Q16BA.), WILL GO BACK TO Q16B.

ENDIF

ENDIF

IF NUMBER OF CHILDREN IN VISIT IS GREATER THAN NUMBER OF CHILDREN IN HOUSEHOLD (Q16B. > QCHILDREN), ASK:

[Multiple]

Q16BB. On this visit, were the extra children that don't usually live in your household either...?
READ OUT

1	Single	Under Your Care Or The Care Of Another Adult Who Lives In Your Household
2	Single	OR Were They In The Care Of An Adult That Doesn't Live In Your Household
3	Single	(DO NOT READ) CAN'T SAY

ENDIF

ENDIF

[Quantity] {Min: 0, Max: 999}

DUMMY VARIABLE COMPUTED - Q14B.*Q15B. OR Q14B.*Q16B.

IF Q14B. x (Q15B. OR Q16B.) > 28, SAY:

[Single]

Q14BB. To calculate the number of children in your party that visited this park in the last 4 weeks we multiply the number of visits YOU made to this park by the number of children that visited with you on YOUR MOST RECENT VISIT. We calculate this to be [%DQ14B] child visits in total over the last 4 weeks. Would this be approximately correct?

1	YES
2	NO
3	CAN'T SAY

IF NO OR CANT SAY (CODES 2 OR 3 ON Q14BB.), SAY:

[Multiple] {Spread:10 }

Q14BC. Could you please explain why this estimated figure is not correct?

INTERVIEWER RECORD RESPONSES IN FULL

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

97	Openend	OTHER (SPECIFY)
98	Single	CAN'T SAY

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

ENDIF

ENDIF

[Single]

QDN3. On this occasion was your visit to this park just for the day or did ou stay in it overnight or for multiple nights ?

1	JUST FOR THE DAY
2	OVERNIGHT
3	MULTIPLE NIGHTS
4	CAN'T SAY/CAN'T RECALL

[Single]

QVISPART3. Was visiting this park … ?
READ OUT

1	Part of regular daily, weekly or monthly rountine
2	Part of a larger/bigger day trip
3	Part of a larger/bigger overnight visit or multi-day trip
4	(DO NOT READ) FOR SOME OTHER REASON
5	(DO NOT READ) CAN'T SAY

[Single]

QVISRESN3. Was visiting this park … ?
READ OUT

1	The only reason for your trip (100% of the trip purpose or intention)
2	The main reason for your trip (75% of the trip prupose or intention)
3	One of the main reasons for your trip (50% of the trip prupose or intention)
4	A minor reason for your trip (25% of the trip prupose or intention)
5	Not ine of the reasons for your trip (0% of the trip prupose or intention)
6	(DO NOT READ) CAN'T SAY

ENDIF

ENDTIMEQ10B

TIMING12 - Q10B TO Q16BB (ENDTIMEQ10B-STARTTIMEQ10B)

ENDIF

IF VISITING 3 PARKS (CODES 1 TO 9998 ON Q10B), ASK:

STARTTIMEQ10C

[Single] {Sort}

Q10C. What is the NAME of ANOTHER National Park, State Conservation Area, Nature Reserve, State Forest or other park you visited in NEW SOUTH WALES in the past 4 weeks?

IF NECESSARY, SAY: That is, SINCE [%DAY7] [%D7] [%M7]?

Remember the park must be in NSW.

IF NECESSARY SAY: By parks I DO NOT MEAN botanical gardens, zoos, wildlife parks, or any local suburban or town parks.

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

1	ABBEY CREEK (CROWDY BAY)
↓	↓
3857	LAKE CANOBOLAS

9997	Fixed Openend	OTHER (SPECIFY)
9998	Fixed	CAN'T SAY
9999	Fixed	NONE/ NO OTHER PARK

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

IF A PARK NAME CAN BE EITHER A OEH MANAGED PARK OR SOME OTHER PARK (CODES 2001 TO 2049 ON Q10C.), ASK:

ONLY OEH OR OTHER PARK FOR PARK NAMED WILL APPEAR IN Q10NC.

[Single] {Sort}

Q10NC. #/Was that Boat Harbour Aquatic Reserve or Boat Harbour Tomaree/Was that /#201.#/, or //#202.?

1021	BANYABBA NATURE RESERVE AND STATE CONSERVATION AREA
3690	MILLEWA STATE FOREST
9998 Fixed	CAN'T SAY

ENDIF

IF CAN'T SAY PARK NAME (CODE 9998 AT Q10C. OR Q10NC.), ASK:

[Multiple] {Spread:10 Sort}

Q11CA. Where was the park located? What town or suburb was it close to?

IF MENTIONS 2 TOWNS, PLEASE TYPE IN FIRST MENTION. IF UNSUCCESSFUL, PLEASE THEN TYPE IN SECOND MENTION. IF UNSUCCESSFUL, PLEASE SELECT 2ND MENTION AS OTHER SPECIFY AND CONTINUE
HIGHLIGHT ALL MENTIONED

1	ABBOTSBURY

489		SAMURI BEACH
997	Fixed Openend	OTHER (SPECIFY)
998	Fixed Single	CAN'T SAY

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

IF GAVE NAME OF SUBURB OR TOWN NOT JERVIS BAY (CODES 1 TO 217 OR 219 TO 472 OR 476 TO 489 ON Q11CA.) AND HAS NOT SPECIFIED A PARK NAME (NOT CODES 2001 TO 2047 ON Q10C.), ASK:

ONLY PARKS FROM SUBURB OR TOWN MENTIONED IN Q11CA. WILL APPEAR IN Q11CB.

[Single] {Sort}

Q11CB. Would it have been...?
READ OUT

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

1		Abbey Creek (Crowdy Bay)
3857		LAKE CAONBOLAS
9997	Fixed Openend	(DO NOT READ) OTHER (SPECIFY)
9998	Fixed	(DO NOT READ) CAN'T SAY

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

ENDIF

IF STILL CAN'T SAY PARK NAME (CODE 9997 OR 9998 AT Q11CB.) OR STILL CAN'T NOMINATE TOWN AND HAS NOT SPECIFIED A PARK NAME (CODE 998 AT Q11CA. AND NOT CODES 2001 TO 2047 AT Q10C. OR CODE 997 AT Q11CA.), ASK:

[Single]

Q12C. Was the park a National Park, a State Conservation Area or a Nature Reserve, or was it a State Forest or some other type of park?

1	NATIONAL PARK, STATE CONSERVATION AREA OR NATURE RESERVE
2	STATE FOREST OR SOME OTHER PARK
3	CAN'T SAY

ENDIF

ENDIF

IF PARK OR TOWN MENTIONED IS JERVIS BAY (CODE 457 ON Q10C. OR CODE 218 ON Q11CA.) OR TOWN MENTIONED IS NOWRA OR ULLADULLA AND PARK IS JERVIS BAY (CODES 318 OR 408 ON Q11CA. AND CODE 457 ON Q11CB.), ASK:

[Single]

QCJB. Was the park located on the land that is part of the ACT known as Booderee National Park, next to the Jervis Bay Naval facility (HMAS Creswell) and village, Lake Windermere, the Botanic Gardens and the Wreck Bay Aboriginal Community OR was it the park that is near Huskisson, Vincentia, Hyams Beach, Erowal Bay, Calalla Bay, Calalla Beach or Culburra Beach known as Jervis Bay National Park? Please note that Booderee National Park used to be known as Jervis Bay National Park.

457	JERVIS BAY NATIONAL PARK
3070	BOODEREE NATIONAL PARK
9998	CAN'T SAY

ENDIF

IF TOWN IS VINCENTIA, HYAMS BEACH, EROWAL BAY (CODES 473 TO 475 ON Q11CA.), CODE AS JERVIS BAY NATIONAL PARK ON QCJB.

ENDIF

IF PARK NAME OTHER (CODE 9997 AT Q10C.), ASK:

[Single] {Sort}

Q13C. Where was the park located? What town or suburb was it close to?

1		ABBOTSBURY
489		SAMURI BEACH
997	Fixed Openend	OTHER (SPECIFY)
998	Fixed Single	CAN'T SAY

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

[Single]

Q12CA. Was the park a National Park, a State Conservation Area or a Nature Reserve, or was it a State Forest or some other type of park?

1	NATIONAL PARK, STATE CONSERVATION AREA OR NATURE RESERVE
2	STATE FOREST OR SOME OTHER PARK
3	CAN'T SAY

ENDIF

IF MOST RECENT VISITED PARK IS OEH/ NPWS (CODES 1 TO 1070 OR 1400 TO 1499 ON Q10C. OR CODE 1 ON Q12C. OR Q12CA.) OR UNKNOWN (CODE 9997 ON Q11CB. OR CODE 997 ON Q11CA. OR CODE 3 ON Q12C. OR Q12CA.), ASK:

[Quantity] {Min: 1, Max: 99, Default Value:99}

Q14C. How many times did you visit [%PARK_NAMEC] in the last 4 weeks, that is, SINCE [%DAY7] [%D7] [%M7]?
RECORD NUMBER

INTERVIEWER NOTE: RECORD CAN'T SAY/REFUSED AS 99

IF NUMBER OF VISITS 10 OR MORE (>9 ON Q14C.), ASK:

[Single]

Q14CA. That's a large number of visits over the last 4 weeks, is [%Q14C] visits correct?

IF NECESSARY, SAY: That is, SINCE [%DAY7] [%D7] [%M7]?

1	YES - NUMBER OF VISITS CONFIRMED
2	NO - NUMBER TO BE AMENDED

IF NUMBER OF VISITS TO BE AMENDED (CODE 2 ON Q14CA.), WILL GO BACK TO Q14C.

ENDIF

ENDIF

IF ONE VISIT ONLY (Q14C.=1), ASK:

[Quantity] {Min: 0, Max: 99, Default Value:99}

Q15C. How many children under 18 IN TOTAL visited [%PARK_NAMEC] with you on this visit?
RECORD NUMBER

INTERVIEWER NOTE: RECORD NO CHILDREN AS 0. RECORD CAN'T SAY/ REFUSED AS 99

IF NUMBER OF CHILDREN 5 OR MORE (Q15C.>4), ASK:

[Single]

Q15CA. That's a large number of children, is [%Q15C] correct?

1	YES - NUMBER OF CHILDREN CONFIRMED
2	NO - NUMBER TO BE AMENDED

IF NUMBER OF CHILDREN TO BE AMENDED (CODE 2 ON Q15CA.), WILL GO BACK TO Q15C.

ENDIF

ENDIF

IF NUMBER OF CHILDREN IN VISIT IS GREATER THAN NUMBER OF CHILDREN IN HOUSEHOLD (Q15C. > QCHILDREN), ASK:

[Multiple]

Q15CB. On this visit, were the extra children that don't usually live in your household either...?
READ OUT

1	Single	Under Your Care Or The Care Of Another Adult Who Lives In Your Household
2	Single	OR Were They In The Care Of An Adult That Doesn't Live In Your Household
3	Single	(DO NOT READ) CAN'T SAY

ENDIF

ENDIF

IF MORE THAN ONE VISIT (Q14C.>1), ASK:

[Quantity] {Min: 0, Max: 99, Default Value:99}

Q16C. On your MOST RECENT visit to [%PARK_NAMEC], how many children under 18 visited with you IN TOTAL?
RECORD NUMBER

INTERVIEWER NOTE: RECORD NO CHILDREN AS 0. RECORD CAN'T SAY/REFUSED AS 99

IF NUMBER OF CHILDREN 5 OR MORE (Q16C. > 4), ASK:

[Single]

Q16CA. That's a large number of children, is [%Q16C] correct?

1	YES - NUMBER OF CHILDREN CONFIRMED
2	NO - NUMBER TO BE AMENDED

IF NUMBER OF CHILDREN TO BE AMENDED (CODE 2 ON Q16CA.), WILL GO BACK TO Q16C.

ENDIF

ENDIF

IF NUMBER OF CHILDREN IN VISIT IS GREATER THAN NUMBER OF CHILDREN IN HOUSEHOLD (Q16C. > QCHILDREN), ASK:

[Multiple]

Q16CB. On this visit, were the extra children that don't usually live in your household either...?
READ OUT

1	Single	Under Your Care Or The Care Of Another Adult Who Lives In Your Household
2	Single	OR Were They In The Care Of An Adult That Doesn't Live In Your Household
3	Single	(DO NOT READ) CAN'T SAY

ENDIF

ENDIF

[Quantity] {Min: 0, Max: 999}

DUMMY VARIABLE COMPUTED - Q14C.*Q15C. OR Q14C.*Q16C.

IF Q14C. x (Q15C. OR Q16C.) > 28, SAY:

[Single]

Q14CB. To calculate the number of children in your party that visited this park in the last 4 weeks we multiply the number of visits YOU made to this park by the number of children that visited with you on YOUR MOST RECENT VISIT. We calculate this to be [%DQ14C] child visits in total over the last 4 weeks. Would this be approximately correct?

1	YES
2	NO
3	CAN'T SAY

IF NO OR CANT SAY (CODES 2 OR 3 ON Q14CB.), SAY:

[Multiple] {Spread:10 }

Q14CC. Could you please explain why this estimated figure

is not correct?

INTERVIEWER RECORD RESPONSES IN FULL

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

⇩⇧

97 Openend OTHER (SPECIFY)

98 Single CAN'T SAY

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

ENDIF

ENDIF

[Single]

QDN4. On this occasion was your visit to this park just for the day or did ou stay in it overnight or for multiple nights ?

1 JUST FOR THE DAY

2 OVERNIGHT

3 MULTIPLE NIGHTS

4 CAN'T SAY/CAN'T RECALL

[Single]

QVISPART4. Was visiting this park … ?
READ OUT

1 Part of regular daily, weekly or monthly rountine

2 Part of a larger/bigger day trip

3 Part of a larger/bigger overnight visit or multi-day trip

4 (DO NOT READ) FOR SOME OTHER REASON

5 (DO NOT READ) CAN'T SAY

[Single]

QVISRESN4. Was visiting this park … ?
READ OUT

1 The only reason for your trip (100% of the trip purpose or intention)

2	The main reason for your trip (75% of the trip prupose or intention)
3	One of the main reasons for your trip (50% of the trip prupose or intention)
4	A minor reason for your trip (25% of the trip prupose or intention)
5	Not ine of the reasons for your trip (0% of the trip prupose or intention)
6	(DO NOT READ) CAN'T SAY

ENDIF

ENDTIMEQ10C

TIMING13 - Q10C TO Q16CB (ENDTIMEQ10C-STARTTIMEQ10C)

ENDIF

IF VISITING 4 PARKS (CODES 1 TO 9998 ON Q10C), ASK:

STARTTIMEQ10D

[Single] {Sort}

Q10D. What is the NAME of ANOTHER National Park, State Conservation Area, Nature Reserve, State Forest or other park you visited in NEW SOUTH WALES in the past 4 weeks?

IF NECESSARY, SAY: That is, SINCE [%DAY7] [%D7] [%M7]?

Remember the park must be in NSW.

IF NECESSARY SAY: By parks I DO NOT MEAN botanical gardens, zoos, wildlife parks, or any local suburban or town parks.

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

1		ABBEY CREEK (CROWDY BAY)
3857		LAKE CANOBOLAS
9997	Fixed Openend	OTHER (SPECIFY)
9998	Fixed	CAN'T SAY
9999	Fixed	NONE/ NO OTHER PARK

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

IF A PARK NAME CAN BE EITHER A OEH MANAGED PARK OR SOME OTHER PARK (CODES 2001 TO 2049 ON Q10D.), ASK:

ONLY OEH OR OTHER PARK FOR PARK NAMED WILL APPEAR IN Q10ND.

[Single] {Sort}

Q10ND. #/Was that Boat Harbour Aquatic Reserve or Boat Harbour Tomaree/Was that /#201.#/, or //#202.?

1021		BANYABBA NATURE RESERVE AND STATE CONSERVATION AREA
3690		MILLEWA STATE FOREST
9998	Fixed	CAN'T SAY

ENDIF

IF CAN'T SAY PARK NAME (CODE 9998 AT Q10D. OR Q10ND.), ASK:

[Multiple] {Spread:10 Sort}

Q11DA. Where was the park located? What town or suburb was it close to?

IF MENTIONS 2 TOWNS, PLEASE TYPE IN FIRST MENTION. IF UNSUCCESSFUL, PLEASE THEN TYPE IN SECOND MENTION. IF UNSUCCESSFUL, PLEASE SELECT 2ND MENTION AS OTHER SPECIFY AND CONTINUE
HIGHLIGHT ALL MENTIONED

1		ABBOTSBURY
489		SAMURI BEACH
997	Fixed Openend	OTHER (SPECIFY)
998	Fixed Single	CAN'T SAY

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

IF GAVE NAME OF SUBURB OR TOWN NOT JERVIS BAY (CODES 1 TO 217 OR 219 TO 472 OR 476 TO 489 ON Q11DA.) AND HAS NOT SPECIFIED A PARK NAME (NOT CODES 2001 TO 2047 ON Q10D.), ASK:

ONLY PARKS FROM SUBURB OR TOWN MENTIONED IN Q11DA. WILL APPEAR IN Q11DB.

[Single] {Sort}

Q11DB. Would it have been...?
READ OUT

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

1		Abbey Creek (Crowdy Bay)
3857		LAKE CANOBOLAS
9997	Fixed Openend	(DO NOT READ) OTHER (SPECIFY)
9998	Fixed	(DO NOT READ) CAN'T SAY

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

ENDIF

IF STILL CAN'T SAY PARK NAME (CODE 9997 OR 9998 AT Q11DB.) OR STILL CAN'T NOMINATE TOWN AND HAS NOT SPECIFIED A PARK NAME (CODE 998 AT Q11DA. AND NOT CODES 2001 TO 2047 AT Q10D. OR CODE 997 AT Q11DA.), ASK:

[Single]

Q12D. Was the park a National Park, a State Conservation Area or a Nature Reserve, or was it a State Forest or some other type of park?

1	NATIONAL PARK, STATE CONSERVATION AREA OR NATURE RESERVE

2	STATE FOREST OR SOME OTHER PARK
3	CAN'T SAY

ENDIF

ENDIF

IF PARK OR TOWN MENTIONED IS JERVIS BAY (CODE 457 ON Q10D. OR CODE 218 ON Q11DA.) OR TOWN MENTIONED IS NOWRA OR ULLADULLA AND PARK IS JERVIS BAY (CODES 318 OR 408 ON Q11DA. AND CODE 457 ON Q11DB.), ASK:

[Single]

QDJB. Was the park located on the land that is part of the ACT known as Booderee National Park, next to the Jervis Bay Naval facility (HMAS Creswell) and village, Lake Windermere, the Botanic Gardens and the Wreck Bay Aboriginal Community OR was it the park that is near Huskisson, Vincentia, Hyams Beach, Erowal Bay, Calalla Bay, Calalla Beach or Culburra Beach known as Jervis Bay National Park? Please note that Booderee National Park used to be known as Jervis Bay National Park.

457	JERVIS BAY NATIONAL PARK
3070	BOODEREE NATIONAL PARK
9998	CAN'T SAY

ENDIF

IF TOWN IS VINCENTIA, HYAMS BEACH, EROWAL BAY (CODES 473 TO 475 ON Q11DA.), CODE AS JERVIS BAY NATIONAL PARK ON QDJB.

ENDIF

IF PARK NAME OTHER (CODE 9997 AT Q10D.), ASK:

[Single] {Sort}

Q13D. Where was the park located? What town or suburb was it close to?

1		ABBOTSBURY
489		SAMURI BEACH
997	Fixed	OTHER (SPECIFY)

	Openend	
998	Fixed Single	CAN'T SAY

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

[Single]

Q12DA. Was the park a National Park, a State Conservation Area or a Nature Reserve, or was it a State Forest or some other type of park?

1	NATIONAL PARK, STATE CONSERVATION AREA OR NATURE RESERVE
2	STATE FOREST OR SOME OTHER PARK
3	CAN'T SAY

ENDIF

IF MOST RECENT VISITED PARK IS OEH/ NPWS (CODES 1 TO 1070 OR 1400 TO 1499 ON Q10D. OR CODE 1 ON Q12D. OR Q12DA.) OR UNKNOWN (CODE 9997 ON Q11DB. OR CODE 997 ON Q11DA. OR CODE 3 ON Q12D. OR Q12DA.), ASK:

[Quantity] {Min: 1, Max: 99, Default Value:99}

Q14D. How many times did you visit [%PARK_NAMED] in the last 4 weeks, that is, SINCE [%DAY7] [%D7] [%M7]?
RECORD NUMBER

INTERVIEWER NOTE: RECORD CAN'T SAY/REFUSED AS 99

IF NUMBER OF VISITS 10 OR MORE (>9 ON Q14D.), ASK:

[Single]

Q14DA. That's a large number of visits over the last 4 weeks, is [%Q14D] visits correct?

IF NECESSARY, SAY: That is, SINCE [%DAY7] [%D7] [%M7]?

1	YES - NUMBER OF VISITS CONFIRMED
2	NO - NUMBER TO BE AMENDED

IF NUMBER OF VISITS TO BE AMENDED (CODE 2 ON Q14DA.), WILL GO BACK TO Q14D.

ENDIF

ENDIF

IF ONE VISIT ONLY (Q14D.=1), ASK:

[Quantity] {Min: 0, Max: 99, Default Value:99}

Q15D. How many children under 18 IN TOTAL visited [%PARK_NAMED] with you on this visit?
RECORD NUMBER

INTERVIEWER NOTE: RECORD NO CHILDREN AS 0. RECORD CAN'T SAY/ REFUSED AS 99

IF NUMBER OF CHILDREN 5 OR MORE (Q15D.>4), ASK:

[Single]

Q15DA. That's a large number of children, is [%Q15D] correct?

1	YES - NUMBER OF CHILDREN CONFIRMED
2	NO - NUMBER TO BE AMENDED

IF NUMBER OF CHILDREN TO BE AMENDED (CODE 2 ON Q15DA.), WILL GO BACK TO Q15D.

ENDIF

ENDIF

IF NUMBER OF CHILDREN IN VISIT IS GREATER THAN NUMBER OF CHILDREN IN HOUSEHOLD (Q15D. > QCHILDREN), ASK:

[Multiple]

Q15DB. On this visit, were the extra children that don't usually live in your household either...?
READ OUT

1	Single	Under Your Care Or The Care Of Another Adult Who Lives In Your Household
2	Single	OR Were They In The Care Of An Adult That Doesn't Live In Your Household
3	Single	(DO NOT READ) CAN'T SAY

ENDIF

ENDIF

IF MORE THAN ONE VISIT (Q14D.>1), ASK:

[Quantity] {Min: 0, Max: 99, Default Value:99}

Q16D. On your MOST RECENT visit to [%PARK_NAMED], how many children under 18 visited with you IN TOTAL?
RECORD NUMBER

INTERVIEWER NOTE: RECORD NO CHILDREN AS 0. RECORD CAN'T SAY/REFUSED AS 99

IF NUMBER OF CHILDREN 5 OR MORE (Q16D. > 4), ASK:

[Single]

Q16DA. That's a large number of children, is [%Q16D] correct?

1	YES - NUMBER OF CHILDREN CONFIRMED
2	NO - NUMBER TO BE AMENDED

IF NUMBER OF CHILDREN TO BE AMENDED (CODE 2 ON Q16DA.), WILL GO BACK TO Q16D.

ENDIF

ENDIF

IF NUMBER OF CHILDREN IN VISIT IS GREATER THAN NUMBER OF CHILDREN IN HOUSEHOLD (Q16D. > QCHILDREN), ASK:

[Multiple]

Q16DB. On this visit, were the extra children that don't usually live in your household either...?
READ OUT

1	Single	Under Your Care Or The Care Of Another Adult Who Lives In Your Household
2	Single	OR Were They In The Care Of An Adult That Doesn't Live In Your Household
3	Single	(DO NOT READ) CAN'T SAY

ENDIF

ENDIF

[Quantity] {Min: 0, Max: 999}

DUMMY VARIABLE COMPUTED - Q14D.*Q15D. OR Q14D.*Q16D.

IF Q14D. x (Q15D. OR Q16D.) > 28, SAY:

[Single]

Q14DB. To calculate the number of children in your party that visited this park in the last 4 weeks we multiply the number of visits YOU

made to this park by the number of children that visited with you on YOUR MOST RECENT VISIT. We calculate this to be [%DQ14D] child visits in total over the last 4 weeks. Would this be approximately correct?

1	YES
2	NO
3	CAN'T SAY

IF NO OR CANT SAY (CODES 2 OR 3 ON Q14DB.), SAY:

[Multiple] {Spread:10 }

Q14DC. Could you please explain why this estimated figure is not correct?

INTERVIEWER RECORD RESPONSES IN FULL

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

97	Openend	OTHER (SPECIFY)
98	Single	CAN'T SAY

** YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". **

ENDIF

ENDIF

[Single]

QDN5. On this occasion was your visit to this park just for the day or did ou stay in it overnight or for multiple nights ?

1	JUST FOR THE DAY
2	OVERNIGHT
3	MULTIPLE NIGHTS
4	CAN'T SAY/CAN'T RECALL

[Single]

QVISPART5. Was visiting this park … ?
READ OUT

1	Part of regular daily, weekly or monthly rountine
2	Part of a larger/bigger day trip
3	Part of a larger/bigger overnight visit or multi-day trip
4	(DO NOT READ) FOR SOME OTHER REASON
5	(DO NOT READ) CAN'T SAY

[Single]

QVISRESN5. Was visiting this park … ?
READ OUT

1	The only reason for your trip (100% of the trip purpose or intention)
2	The main reason for your trip (75% of the trip prupose or intention)
3	One of the main reasons for your trip (50% of the trip prupose or intention)
4	A minor reason for your trip (25% of the trip prupose or intention)
5	Not ine of the reasons for your trip (0% of the trip prupose or intention)
6	(DO NOT READ) CAN'T SAY

ENDIF

ENDTIMEQ10D

TIMING14 - Q10D TO Q16DB (ENDTIMEQ10D-STARTTIMEQ10D)

ENDIF

[Multiple]

QSEGMENT. Which of the following activities have you undertaken in the last 12 months FOR LEISURE PURPOSES?
READ OUT

1. Education experiences of some form?
2. Aboriginal cultural experience? [*Keep position*]
3. Non-aboriginal small group heritage or cultural tours? [*Keep position*]
4. Experiences that provided you with a sense of balance/time out/health/ wellness?
5. Nature appreciation?)
6. A low cost trip just to get out of home?)
7. Taken visitors to visit a NSW national park?
8. Visited a natural place just to escape technology?
9. A family fun experience?

10. Exercising to get healthy?
11. Engaging with the arts in some way?
12. Attended an outdoor music/culture event?
13. Attended an outdoor sporting event?
14. Stayed overnight in a special location ?
15. An extended walking trip?

98 [DO NOT READ] NONE OF THESE [*Keep position ◆ Exclusive*]
99 [DO NOT READ [CAN'T SAY/CAN'T RECALL [*Keep position ◆ Exclusive*]

[Multiple]

QLIKELY. Using a scale of 1 to 10 where 1 means not at all likely and 10 means very likely, how likely are you to consider each of the following types of trips in NSW to a NSW national park IN THE NEXT 12 MONTHS?
READ OUT

1. A day trip to a NSW national park
2. An overnight trip to a NSW national park

DEMOGRAPHICS

Finally a few more questions about you and your household.

STARTTIMEQ17

[Multiple]

Q17. Which languages are USUALLY spoken in the household?

1		ENGLISH
2		ITALIAN
3		GREEK
4		CANTONESE
5		MANDARIN
6		ARABIC
7		VIETNAMESE
8		GERMAN
9		SPANISH
10		HINDI
11		TAGALOG (FILIPINO)
12		ABORIGINAL/INDIGENOUS LANGUAGE
97	Open end	OTHER (SPECIFY)
98	Single	CAN'T SAY/REFUSED

[Single]

Q18. What is the highest level of education you have reached?

1		PRIMARY SCHOOL

2	SOME SECONDARY SCHOOL
3	SOME TECHNICAL OR COMMERCIAL
4	PASSED 4TH FORM/ YEAR 10
5	PASSED 5TH FORM/ YEAR 11/ LEAVING
6	FINISHED TECHNICAL SCHOOL, COMMERCIAL COLLEGE OR TAFE
7	FINISHED/ NOW STUDYING H.S.C./ V.C.E./ YEAR 12
8	DIPLOMA FROM C.A.E.
9	SOME UNIVERSITY/ C.A.E.
10	DEGREE FROM UNIVERSITY OR CAE
11	POST GRADUATE QUALIFICATION

[Single]

Q19. Are you now in paid employment?

IF YES, ASK: Is that full-time for 35 hours or more a week, or part-time?

1	YES, FULL-TIME
2	YES, PART-TIME
3	NO

IF NOT IN PAID EMPLOYMENT (CODE 3 ON Q19), ASK:

[Single]

Q19B. Are you now looking for a paid job?

IF LOOKING, ASK: A full-time job for 35 hours or more a week, or a part-time job?

IF NOT LOOKING, ASK: Are you retired, a student, a non-worker or home duties?

1	LOOKING FOR FULL-TIME
2	LOOKING FOR PART-TIME
3	RETIRED
4	STUDENT
5	NON-WORKER
6	HOME DUTIES

ENDIF

ASK EVERYONE

[Single]

Q20. Are you married, separated, divorced, widowed, de facto, engaged, planning to marry or

single?

1	MARRIED
2	SEPARATED
3	DIVORCED
4	WIDOWED
5	DE FACTO
6	ENGAGED
7	PLANNING TO MARRY
8	SINGLE

IF CHILDREN LIVE IN HOUSEHOLD (QCHILDREN>0), ASK:

[Single]

Q21. Are you the parent of any of the children who usually live in this household?

1	YES
2	NO
3	CAN'T SAY

ENDIF

[Multiple]

QDISB. Do you identify as a person living with a disability or as a person caring for someone with a disability?

1	PERSON LIVING WITH A DISABILITY
2	PERSON CARING FOR SOMEONE WITH A DISABILITY
3	[SINGLE] NEITHER OF THESE
4	SINGLE] CAN'T SAY

[Single]

Q22. RESPONDENT LIFECYCLE - COMPUTED FROM QAGE, QCHILDREN, Q20 AND Q21

1	Single 18-34 No Children
2	Single 18-34 Children
3	Single 35+ No Children
4	Single 35+ Children
5	Married 18-34 No Children

6	Married 18-34 Children
7	Married 35+ No Children
8	Married 35+ Children

FROM WAVE 11 – ASK EVERYONE

[Single]

QHHINCPV1. What is the approximate ANNUAL IINCOME of your household (i.e. all income earned before any expenses, including tax, are deducted)?

1	$33,800 or less per year ($650 per week or less)
2	$33,801-$65,000 per year ($651-$1,250 per week)
3	$65,001-$104,000 per year ($1,251-$2,000 per week)
4	$104,001-$197,600 per year ($2001-$3,800 per week)
5	More than $197,600 per year (more than $3,800 per week)
6	(DO NOT READ) CAN'T SAY
7	(DO NOT READ) PREFER NOT TO SAY

IF CAN'T SAY/PREFER NOT TO SAY HOUSEHOLD INCOME (CODES 6 OR 7 ON QHHINCPV1), ASK:

[Single]

QHHINCPV2. Well would you say that your approximate annual household income is $65,000 or less per year or more than $65,000 per year?

1	$65,000 or less per year ($1,250 per week or less)
2	More than $65,000 per year (more than $1,250 per week)
3	(DO NOT READ) CAN'T SAY
4	(DO NOT READ) PREFER NOT TO SAY

ENDIF

ENDIF

Thank you for your time and assistance. This market research is carried out in compliance with the Privacy Act, and the information you have provided will be used only for research purposes. We are conducting this research on the frequency of visits to National Parks for the NSW Office of Environment and Heritage.

If you would like any more information about this project or Roy Morgan, you can phone us on 1800 337 332

ENDTIMEQ17

TIMING15 - Q17 TO END (ENDTIMEQ17-STARTTIMEQ17)

END-OF-QUESTIONNAIRE

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Prepared by:
<Insert your name>

For Further information contact:

Roy Morgan
Tonic House
386 Flinders Lane, Melbourne
Ph: +61 (3) 9629 6888
E: askroymorgan@roymorgan.com

File Reference: