

77



ROY  
MORGAN

Exploring human  
behaviour from  
every angle.

[roymorgan.com](http://roymorgan.com)

**Annual Visits to NPWS  
Managed Parks in New  
South Wales**

**April 2023**

**Annual Visits to NPWS Managed Parks  
in New South Wales**  
April 2023

**This page intentionally left blank.**

## Contents

1. Executive Summary	6
1.1 Background	6
1.2 Approach to Calculating and Improving the Park Visitation Estimate	6
1.3 NPWS Park Visitation	9
1.3.1 Annual NPWS Park Visitation	9
1.3.2 Impact of Non-Response Adjustment on the NPWS Park Visitation Estimate	10
1.3.3 Potential Factors Influencing NPWS Park Visits	10
1.3.4 Annual Visitation by Region of Origin	15
1.3.5 NPWS Park Visitation by Wave	16
1.3.6 NPWS Park Visitation by NPWS Branch	18
1.4 Activities Undertaken on Most Recent Park Visit	19
1.5 Satisfaction with the Experience of Most Recent Park Visit	19
1.6 Duration of Visit and Type of Trip to a NPWS Park	20
1.7 Role of Park Visit in the Overall Travel Decision	21
1.8 Park Visitor Needs Base Segmentation	22
2. Introduction	25
2.1 Background	25
2.2 Objectives of This Study	25
3. Methodology	28
3.1 Sample Selection	28
3.1.1 New Sampling Frame Used in 2012, 2014, 2016, 2018 and 2020	29
3.1.2 Survey Waves	31
3.2 Questionnaire Design	35
3.2.1 Park Visitation Questions	35
3.2.2 Qualifying Questions and HTS	35
3.2.3 Naming the Park Visited	36
3.2.4 Questions Relating to NPWS Park Visits	37
3.2.5 New Questions Exploring NPWS Park Visitation	39
3.2.6 Park Visitor Market Needs Based Segmentation Questions	39
3.2.7 Demographic Questions	40
3.3 Response Rates and Strike Rates	41
3.3.1 Response Rates	41
3.3.2 Strike Rates for Visiting a Park in NSW in the last 4 weeks	42
3.4 Questionnaire Length	45
4. Continuous Improvement	46
4.1 Improving the Accuracy of NPWS/Non-NPWS Park Nominations	47
4.2 Improving the Accuracy of the Visitation Estimate	48
5. Method of Calculating NPWS Park Visitation	51
5.1 Taking a Robust Approach to Estimating Visitation	53
5.2 NPWS Adult Park Visitation Calculation from Survey Data	53

## **2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

5.3	NPWS Child Park Visitation Calculation from Survey Data	54
5.4	Total NPWS Park Visitation Calculation from Survey Data	55
5.5	NPWS Park Visitation Calculation for Non-surveyed Regions	56
5.6	NPWS Park Visitation Estimate Revision to Account for Sample Frame Change	57
6.	Annual Visitation Estimate Calculation	58
6.1	Summary of Visitation Estimate	58
6.2	Calculating the Visitation Estimate	58
6.2.1	Annual Visitation from Survey Data	58
6.2.2	Adult Visitation from Survey Data (Unadjusted)	58
6.2.3	Child Visitation from Survey Data (Unadjusted)	59
6.2.4	Annual Survey Visitation Adjustment	61
6.2.5	Annual Visitation, including Non-surveyed Region Estimates	73
6.2.6	Confidence Limits of the Annual Visitation Estimates	76
6.3	Visitation by Park Operations Branch	77
6.3.1	Annual Visitation by NPWS Branch	78
6.3.2	Visitation to Selected NPWS Parks	91
7.	Potential Factors Influencing Park Visits	101
7.1	Impact of Bushfires and the COVID-19 Pandemic	101
7.2	Visitation to New South Wales	105
7.3	Visitation to Overseas Destinations	111
7.4	Economic Impacts	115
7.5	Weather Effects	119
7.5.1	Temperature Effects on NPWS Park Visitation	119
7.5.2	Rainfall Effects on NPWS Park Visitation	130
7.5.3	Significant and Sustained Weather Event Effects on NPWS Park Visitation	141
8.	Other Survey Results	145
8.1	Unweighted (Sample) Data versus Weighted (Population) Data	145
8.2	Park Visitation by Selected Demographics	147
8.3	Number of Individual Visits made to NPWS Managed Parks by Adults	160
8.4	Duration of Visit to a NPWS Park	161
8.5	Type of Trip to a NPWS Park	163
8.6	Role of NPWS Park Visit in Trip Decision	168
8.7	Activities Undertaken at Most Recently Visited Park	173
8.8	Satisfaction with Most Recent Visit to a NPWS Park	187
9.	Park Visitor Needs Based Segmentation	195
9.1	Segment Profile	198
9.2	NPWS Park Visits by Segment	202
10.	APPENDIX – QUESTIONNAIRE	205

# 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 2022. This report provides a summary of findings from the 2022 survey, comparing results with previous survey years.

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<sup>1</sup>. Interlocking quotas were set for age by sex by region to ensure representativeness across those areas. A total of 1,200 interviews were conducted, on average, each wave, with the overall sample size after wave thirteen in 2022 being 15,623 people.

The term *visitation*<sup>2</sup> 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, 2018 and 2020 surveys, in calculating the 2022 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 visitation 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 visitation estimate;

---

<sup>1</sup> 2008 and 2010 survey estimates have now been adjusted to account for the change in the sampling frame.

<sup>2</sup> Visitation calculation = [ $\Sigma$ (number of adult visits to a NPWS Park obtained for each respondent multiplied by their individual *population* survey weight for all 13 survey waves) + ( $\Sigma$ (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.

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

- 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, to ensure that the entire population had 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:

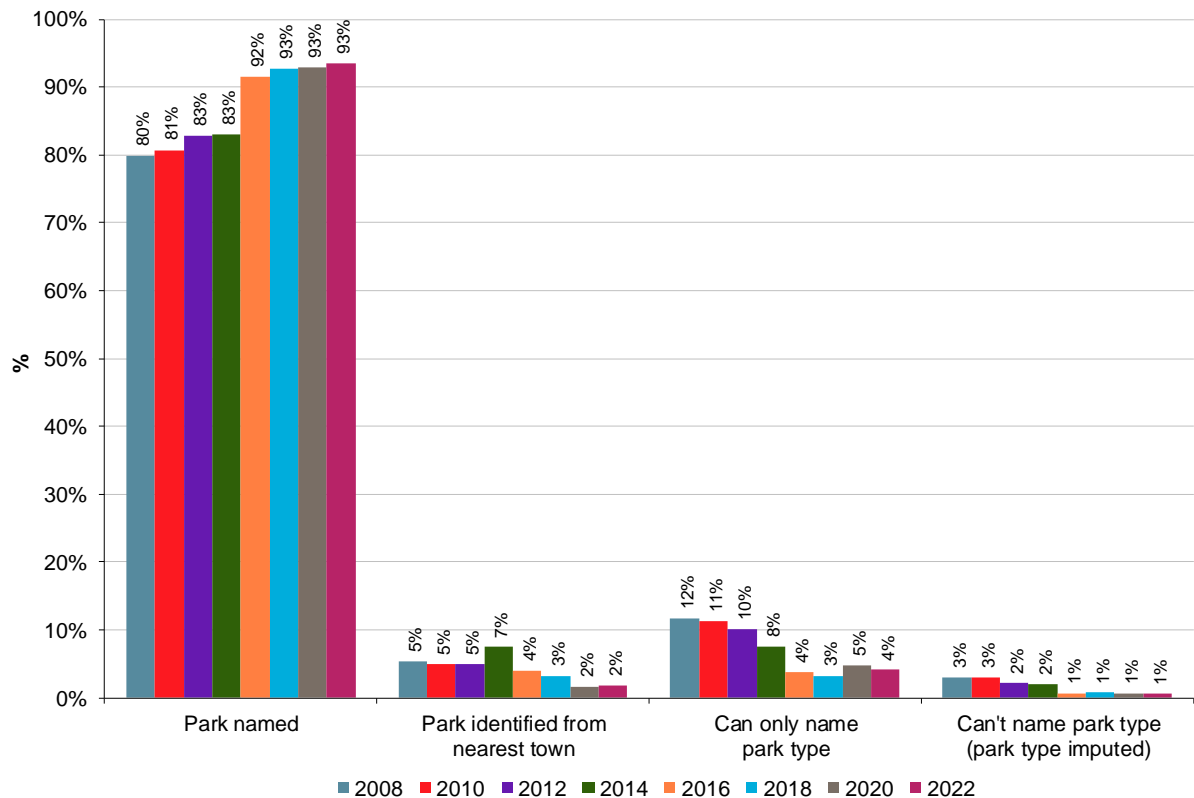
- Where necessary, updating lists of NPWS Park names and their aliases at the end of each wave to improve park categorisation;
- Adding names of non-NPWS Parks regularly visited to the survey frame to assist in easily identifying and excluding parks not in-scope for the survey;
- Including the actual 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 have a tendency to name a park they visited 5 weeks ago 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 2022 survey, two major aspects allowed for great confidence in the visitation estimate obtained. Firstly, in 2022, (95.3%) 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, 2018 and 2020 results (see Chart A). This result was even higher when naming NPWS parks in 2022 (98.3%). 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 showed that a significant 50% of respondent's categorised the NSW park type

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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 2022 survey, only 4.7% of responses were categorised as either a NPWS or non-NPWS Park by park type only (4.1% allocated by respondent, 0.6% imputed, as the respondent was uncertain of the park type). The result was even lower for categorising PWS parks (1.7% - 1.3% allocated by the respondent, 0.4% imputed).

Chart A: Allocation of Park Type by Method<sup>3</sup>



Source: NPWS Parks Visitor Surveys 2008 – 2022- Visited a park in NSW in the last 4 weeks.  
 Base: 2008 n=1,563; 2010 n=1,821; 2012 n=1,815; 2014 n=2,071; 2016 n=2,134; 2018 n=2,094; 2020 n= 1,450; 2022 n=1,629

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.

<sup>3</sup> 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 2022 was 3:1 NPWS to non-NPWS Parks).

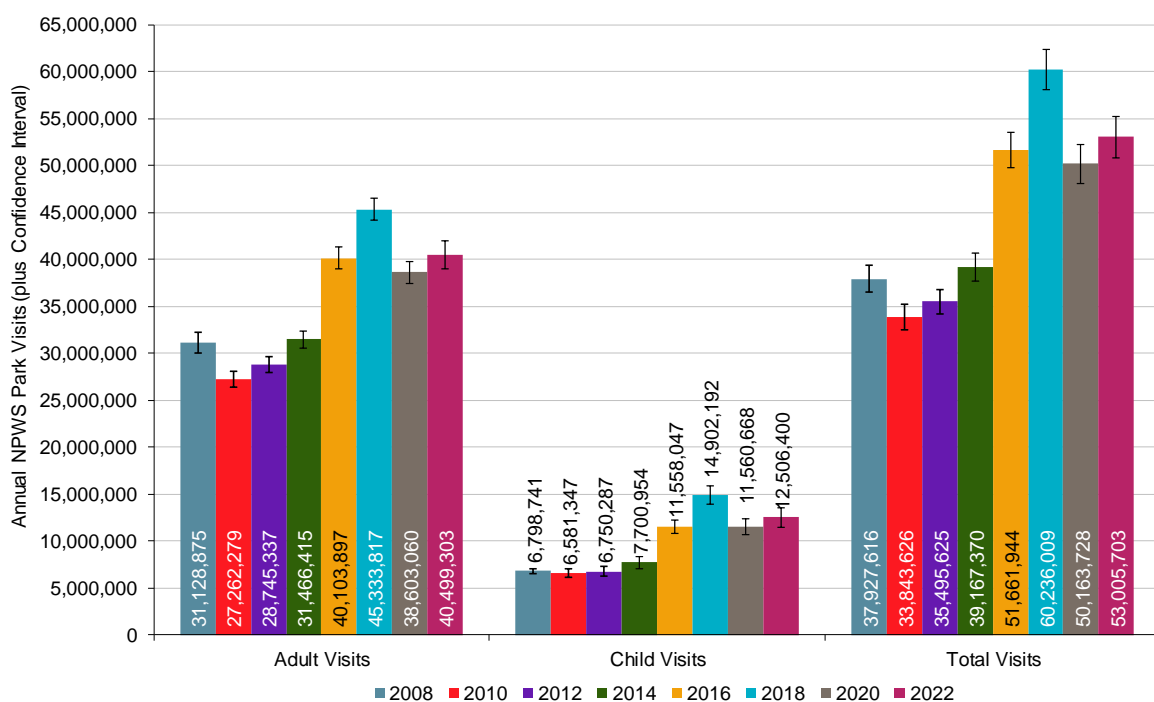


### 1.3 NPWS Park Visitation

#### 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 2022 (Chart B). The 2022 NPWS Park visitation estimate is the second highest attained (53.0 million visits). Adult visits comprise 76.4% of all visits in 2022, compared with 77.0% in 2020, 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 - 2022

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; 2022 n=15,623

The confidence interval for the *survey* estimate in 2022 is  $\pm 4.11\%$  of the total estimate ( $\pm 2.97\%$  for adults;  $\pm 7.84\%$  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 2022 varies from 50.8m to 55.3m. This overall margin of error ( $\pm 4.24$ ) is well within the parameters required by the NPWS ( $\pm 8\%$  at the 95% confidence level). It also means that, when taking into account the margin of error for previous surveys, the 2022 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, 2020 and 2022 visitation estimates.

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

### 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
- 2022: 0.7783

As can be seen above, the 2014 non-response adjustment ratio was the lowest, whilst the 2022 ratio was the highest. This means that the 2014 visitation calculation from survey responses was down-weighted the most and the 2022 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 50% of mobile only respondents being surveyed in 2022, 39% in 2020, 29% in 2018 and 22% in 2016, compared with 9% in 2014 when the actual incidence rate in the survey populations were 62%, 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 37% of the NSW park system adversely impacted. Many

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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 were analysed on the basis of three distinct time periods, comparing park average visits per wave with the same periods in 2018:

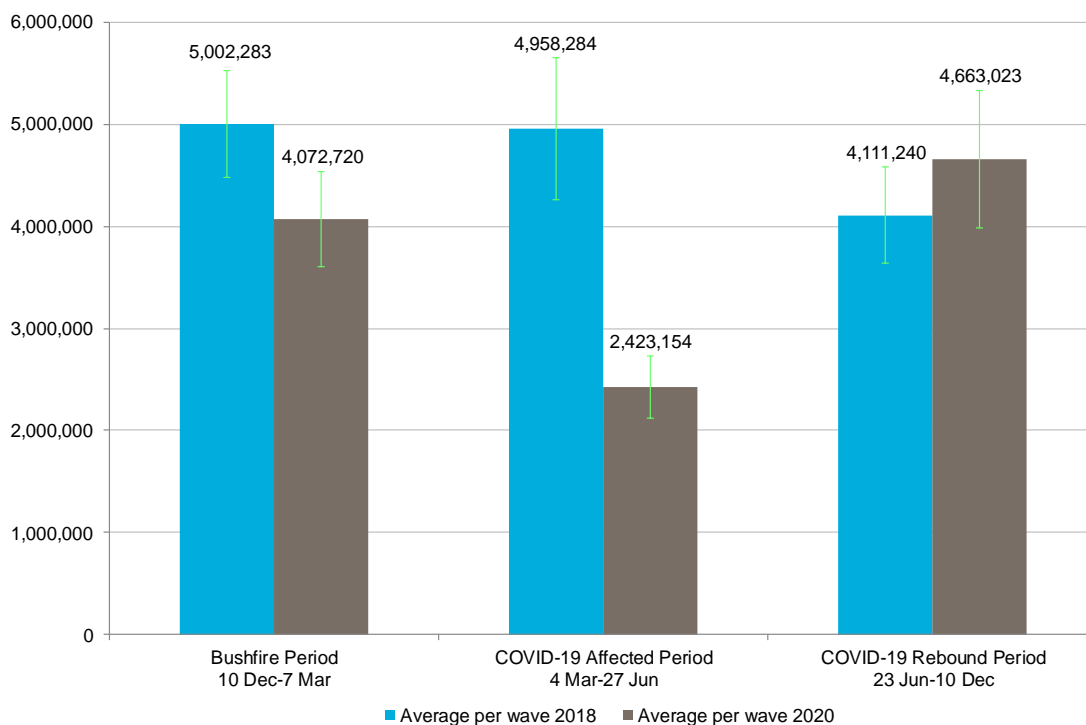
**Bushfire Period** – 10 Dec 2019 to 7 Mar (waves 1-3)

**COVID-19 Affected Period** – 4 Mar- 27 Jun (waves 4-7)

**COVID-19 Rebound Period** – 23 Jun-10 Dec (waves 8-13)

Chart C below 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. Visitation per wave also declined significantly the COVID-19 Affected period (from 4.96m visits per wave to 2.42m visits per wave) These results provide evidence that bushfires and COVID-19 restrictions had a negative impact on park visitation until the middle of 2020.

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



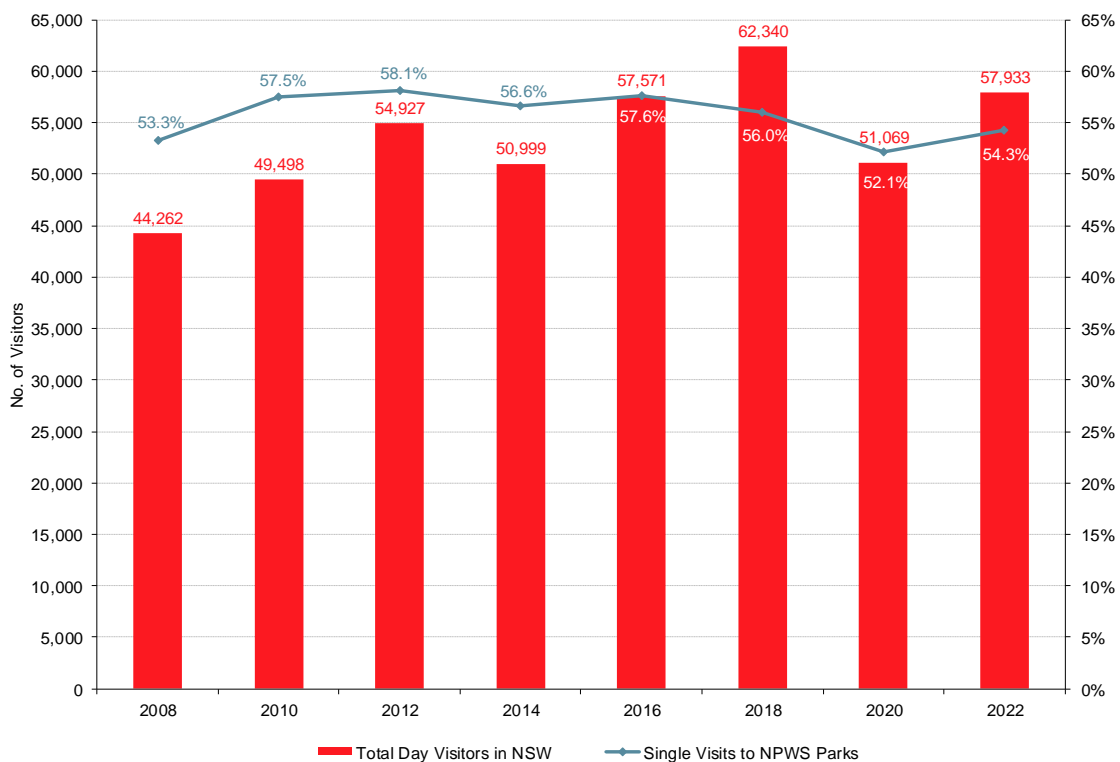
Source: NPWS Parks Visitor Surveys 2018 - 2020  
Base: 2018 n=1,739; 2020 n- 1,178

- Major rain events and flooding in NSW across the whole of 2022, from the QLD border to the Illawarra region limited access to parks along the coast, subsequently curtailing visitation, but particularly to parks in the Hunter North Coast Branch.

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

- **Visitation to NSW.** As shown below, visitation to NPWS Parks generally mirrors visitation to and within NSW.
  - Tourism Research Australia<sup>4</sup> (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, declined again in 2018 and 2020, then rebounded in 2022. 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, declined in 2020, then rebounded in 2022<sup>5</sup>. 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 below).

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



Sources: National Visitor Survey – Tourism Research Australia; NPWS Parks Visitor Surveys 2008-2022:

- 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, but rebounded to 14.2m in 2022. This pattern generally matches the overnight visitation

<sup>4</sup> Tourism Research Australia – National Visitor Survey

<sup>5</sup> Tourism Research Australia – National Visitor Survey

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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<sup>6</sup> 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 and international travel patterns have still not normalised in 2022.
  - 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. With travel overseas still limited in 2022 and exchange rates still relatively high, it is not surprising that 2022 NPWS visitation increased from 2020 levels in 2022.
  - 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 (noting that international travel patterns have still not returned to normal since 2020).
- **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 mapped against NPWS park visits it was found that a weak 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.
  - 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<sup>7</sup> from the average generally shows a direct correlation between visitation and temperature from 2008 to 2022. When temperatures were above the average, visitation generally increased, and

---

<sup>6</sup> Tourism Research Australia – National Visitor Survey

<sup>7</sup> Bureau of Meteorology – Climate Data Online.

## **2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

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 6<sup>th</sup> 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.

2022 was a very wet year – the wettest summer since 2011-12; the wettest autumn since 1990, with flooding from the Northern Rivers to the Illawarra coast; it was the wettest July on record for the Central Coast and a very wet August across the state; spring was the wettest on record and the coolest since 1992. Whilst NPWS park visitation tended to be high in early summer, visitation was below the norm for the rest of 2022, indicating that significant and prolonged rain events did impact negatively on NPWS park visitation.

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

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

### 1.3.4 Annual Visitation by Region of Origin

Intrastate visitation comprised 86.8% of all visits in 2022, the lowest proportion recorded, compared with 92.0% in 2020, 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 13.2% of visits in 2022, the highest proportion recorded, compared with 8.0% in 2020, 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 Park Visitation Estimate 2020 <sup>1</sup>	Adult Visits		Child Visits		Total Visits	
	No.	%	No.	%	No.	%
Sydney	22,903,294	56.55%	6,920,365	55.33%	29,823,659	56.26%
Remainder NSW	12,764,396	31.52%	3,422,400	27.37%	16,186,796	30.54%
ACT	524,186	1.29%	211,812	1.69%	735,998	1.39%
Melbourne	1,641,164	4.05%	952,865	7.62%	2,594,030	4.89%
Remainder VIC	635,532	1.57%	178,682	1.43%	814,214	1.54%
Brisbane	780,022	1.93%	268,931	2.15%	1,048,952	1.98%
Remainder SE QLD	387,084	0.96%	122,111	0.98%	509,194	0.96%
Remainder QLD	249,846	0.62%	124,177	0.99%	374,022	0.71%
SA	218,215	0.54%	108,456	0.87%	326,671	0.62%
WA	155,112	0.38%	77,093	0.62%	232,205	0.44%
TAS	100,118	0.25%	49,760	0.40%	149,877	0.28%
NT	140,336	0.35%	69,749	0.56%	210,085	0.40%
<b>Total Australia 2022</b>	<b>40,499,304</b>	<b>100.00%</b>	<b>12,506,399</b>	<b>100.00%</b>	<b>53,005,703</b>	<b>100.00%</b>
<b>Margin of Error<sup>2</sup></b>	<b>±3.08%</b>	<b>n/a</b>	<b>±8.03%</b>	<b>n/a</b>	<b>±4.24%</b>	<b>n/a</b>
<b>Total Australia 2020</b>	<b>38,541,509</b>	<b>100.00%</b>	<b>11,543,729</b>	<b>100.00%</b>	<b>50,085,238</b>	<b>100.00%</b>
<b>Margin of Error<sup>2</sup></b>	<b>±3.07%</b>	<b>n/a</b>	<b>±7.41%</b>	<b>n/a</b>	<b>±4.07%</b>	<b>n/a</b>
<b>Total Australia 2018</b>	<b>45,333,817</b>	<b>100.00%</b>	<b>14,902,192</b>	<b>100.00%</b>	<b>60,236,009</b>	<b>100.00%</b>
<b>Margin of Error<sup>2</sup></b>	<b>±2.61%</b>	<b>n/a</b>	<b>±6.64%</b>	<b>n/a</b>	<b>±3.61%</b>	<b>n/a</b>
<b>Total Australia 2016</b>	<b>40,103,897</b>	<b>100.00%</b>	<b>11,558,047</b>	<b>100.00%</b>	<b>51,661,944</b>	<b>100.00%</b>
<b>Margin of Error<sup>2</sup></b>	<b>±2.89%</b>	<b>n/a</b>	<b>±6.24%</b>	<b>n/a</b>	<b>±3.64%</b>	<b>n/a</b>
<b>Total Australia 2014</b>	<b>31,674,661</b>	<b>100.00%</b>	<b>7,761,387</b>	<b>100.00%</b>	<b>39,436,048</b>	<b>100.00%</b>
<b>Margin of Error<sup>2</sup></b>	<b>±2.84%</b>	<b>n/a</b>	<b>±7.99%</b>	<b>n/a</b>	<b>±3.85%</b>	<b>n/a</b>
<b>Total Australia 2012</b>	<b>28,745,337</b>	<b>100.00%</b>	<b>6,750,287</b>	<b>100.00%</b>	<b>35,495,625</b>	<b>100.00%</b>
<b>Margin of Error<sup>2</sup></b>	<b>±2.90%</b>	<b>n/a</b>	<b>±8.02%</b>	<b>n/a</b>	<b>±3.87%</b>	<b>n/a</b>
<b>Total Australia 2010</b>	<b>27,262,279</b>	<b>100.00%</b>	<b>6,581,347</b>	<b>100.00%</b>	<b>33,843,626</b>	<b>100.00%</b>
<b>Margin of Error<sup>2</sup></b>	<b>±3.18%</b>	<b>n/a</b>	<b>±7.44%</b>	<b>n/a</b>	<b>±4.00%</b>	<b>n/a</b>
<b>Total Australia 2008</b>	<b>31,128,875</b>	<b>100.00%</b>	<b>6,798,741</b>	<b>100.00%</b>	<b>37,927,616</b>	<b>100.00%</b>
<b>Margin of Error<sup>2</sup></b>	<b>±3.34%</b>	<b>n/a</b>	<b>±4.40%</b>	<b>n/a</b>	<b>±3.54%</b>	<b>n/a</b>

Source: NPWS Parks Visitor Surveys 2008 - 2022

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; 2022 n=15,623

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.

Across all survey years the general trend is for NPWS park visitation to be highest in waves 1 and 2 (Summer - December January, when the weather is warm and most people have holidays). NPWS visitation is lowest in wave 6, after Anzac Day in late Autumn (i.e. May). All other survey waves have similar levels of visitation (i.e. lower than waves 1 and 2, but higher than wave 6).

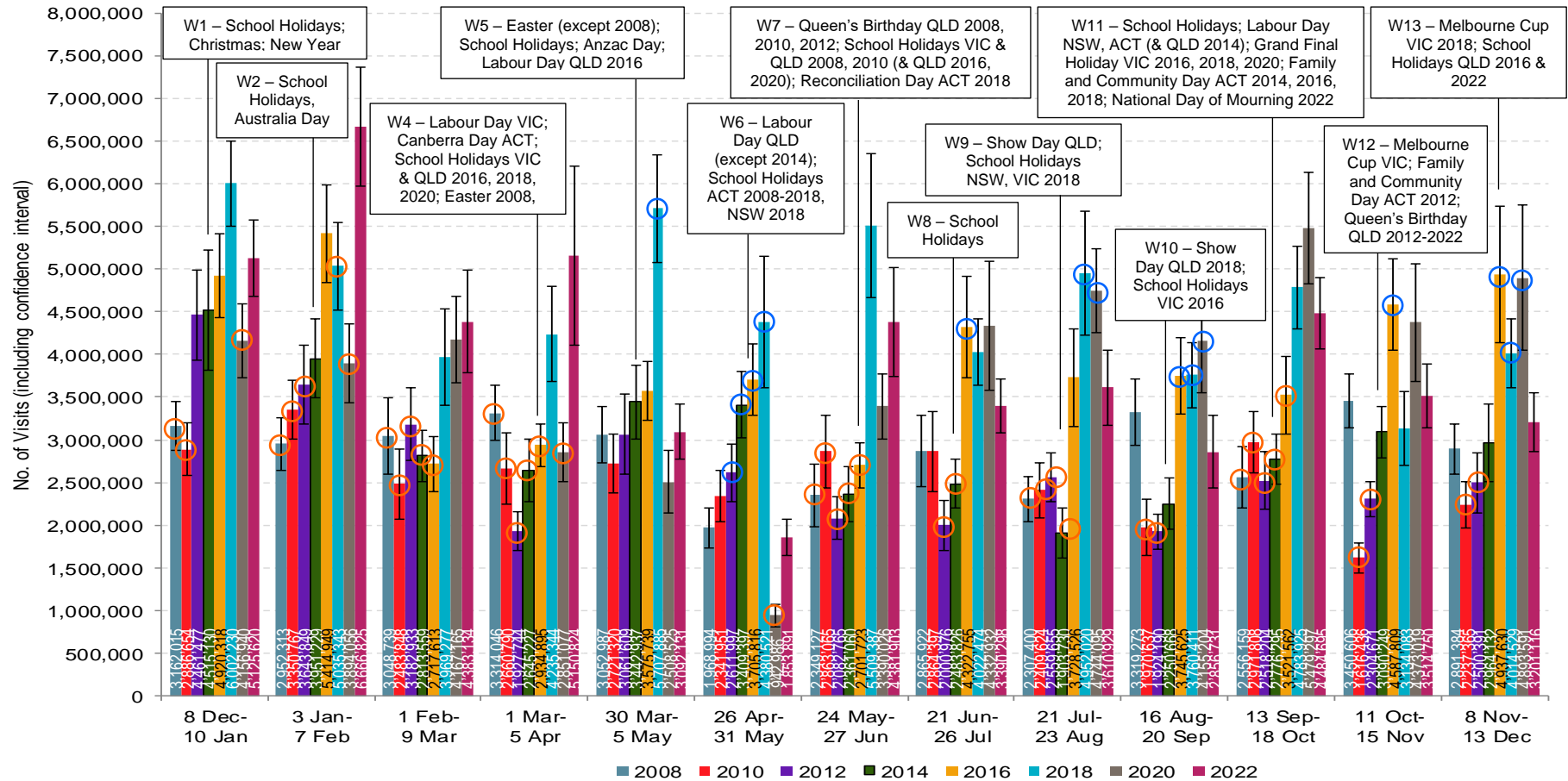
In general, NPWS park visitation levels in 2022 tend to be higher than 2020 levels from wave 1 to wave 7 (December to June), significantly so for waves 1, 2, 4 and 6). This coincides with the downturn in visitation in 2020 due to bushfires and COVID-19 lockdowns. 2022 visitation then tends to be lower than 2020 visitation from waves 8 to 13 (late June to early-December), significantly so for waves 9, 10 and 12. When compared with 2018, the highest recorded visitation year, 2022 NPWS visitation is lower for nine of the 13 waves - waves 1, 5-11 and 13 - significantly lower for waves 5-6, 9-10 and 13.

As has been the case in previous years, annual and wave by wave NPWS Park visitation patterns are mainly determined by adult visitation patterns. Overall the annual child visitation estimate was the second highest on record in 2022 (12.5m visits), with child visits representing 23.6% of all NPWS Park visits. Over time the number of child visits as a proportion of all visits is generally increasing (17.9% 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. It has then increased to 23.6% in 2022, but this proportion is still not as high as in 2018 (24.7%)



2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

Chart E: Adjusted Annual Visitation Survey Estimate by Wave<sup>8</sup>



Source: NPWS Parks Visitor Surveys 2008 – 2022  
 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; 2022 n=15,623

○ Significantly lower than 2022 estimate  
 ○ Significantly higher than 2022 estimate

<sup>8</sup> 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; 50,085,238 for 2020 and 51,712,843 for 2022 (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; 728,581 visits in 2018; 196,325 visits in 2020. 1,292,860 in 2022) are estimates for regions of Australia not included in the survey.

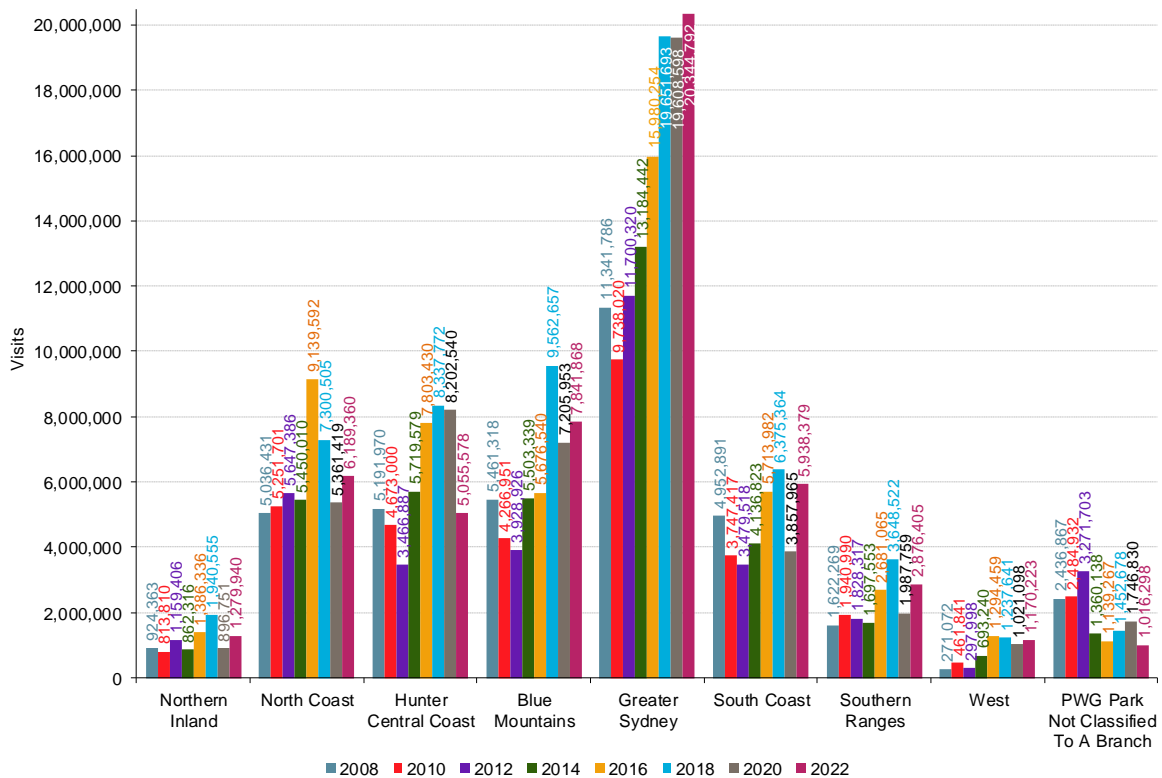
## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

### 1.3.6 NPWS Park Visitation by NPWS Branch

Chart F shows that in 2022, visits to parks increased on 2020 visits for all Branches, except for the Hunter Central Coast Branch. Visits were the highest recorded for the Greater Sydney Branch in 2022 (20.3m), topping the previous record recorded in 2018 (19.7m),

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 and again to 40% in 2022 – the highest proportional contribution obtained so far. Hunter Central Coast Branch had its lowest proportional contribution recorded in 2022 (10%), down from 16% in 2020.

Chart F: NPWS Annual Visitation by NPWS Branch<sup>9</sup>



Source: NPWS Parks Visitor Surveys 2008 - 2022

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; 2022 n=15,623

<sup>9</sup> 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 2022 the top four activities undertaken remained unchanged. Walking activities increased in 2022 to their highest level recorded (70%), significantly higher than proportions attained from 2008 to 2018. Incidence of undertaking water-based recreation declined slightly in 2022 (17%), while the proportion picnicking and dining (12%) slightly increased from 2020 levels. The proportion touring and sightseeing attained its highest level recorded in 2022 (16%), significantly higher than in 2008-2016 and 2020.

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

Activity	2008	2010	2012	2014	2016	2018	2020	2022
Walking	54%	50%	56%	49%	63%	64%	68%	70%
Water-Based Recreation	17%	18%	19%	20%	17%	21%	18%	17%
Touring & Sightseeing	12%	10%	9%	13%	13%	14%	12%	16%
Picnicking & Dining	14%	16%	16%	11%	14%	14%	11%	12%

Source: NPWS Parks Visitor Surveys 2008 – 2022 – Most recent visit to a NPWS park  
 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; 2022 n=1,310

In 2018 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 both 2018 and 2022, which is likely to be attributed to COVID-19, where time restrictions for exercise may have caused a slight lengthening of the walking period. In 2022, over one third walked for *less than an hour* (37%), significantly higher than in 2020 (28%), almost six in ten walked for *up to half a day* (57%), with 5% 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 65%, while in 2020 the proportion declined slightly to 63%. In 2022 the proportion *very satisfied* attained its highest level of 66%, significantly higher than proportions recorded in 2008-2016.

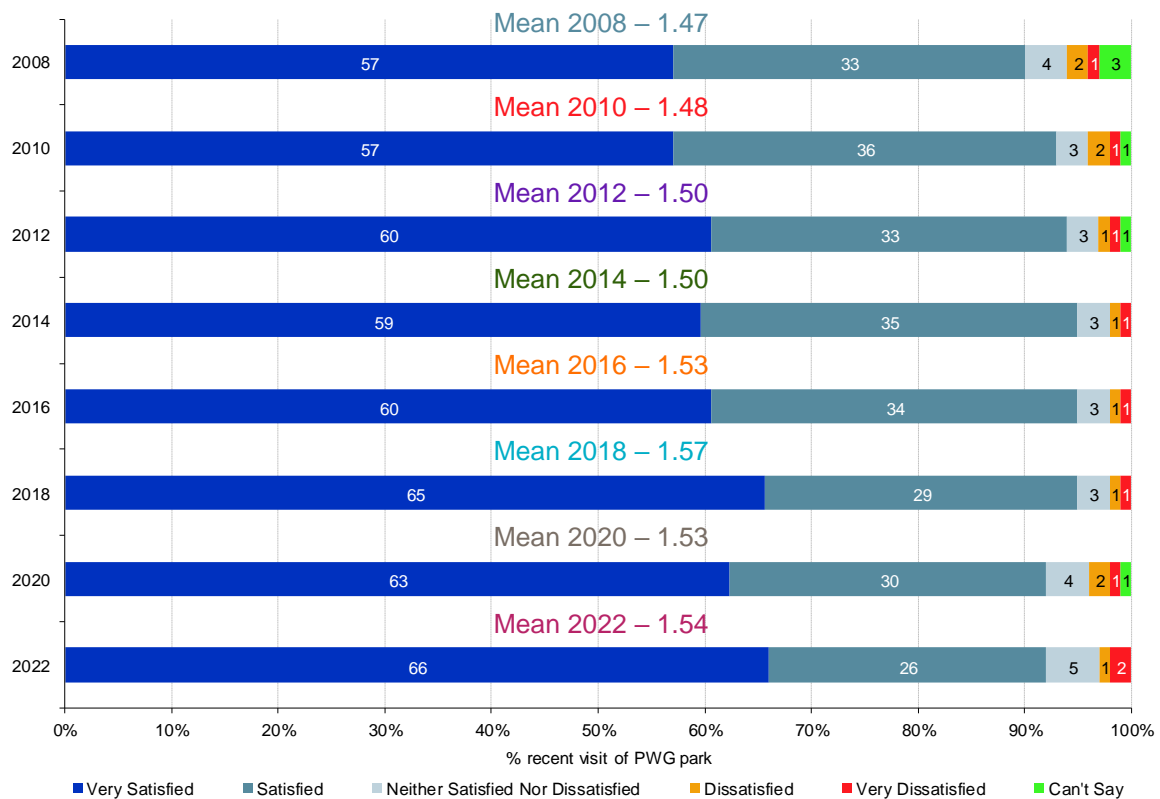
In 2008 nine in ten were *at least satisfied* with their park visit (i.e. sum of those satisfied or very satisfied), with the proportion increasing to 93% in 2010 and 2012, and increasing again to 94% from 2014 to 2018, with a slight decline observed to 93% in 2020 and again in 2022 to 92%.

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

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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. In 2020 means satisfaction declined slightly to 1.53 and increased marginally to 1.54 in 2022. Overall then, satisfaction with one's most recent park visit experience is very high.

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



Source: NPWS Parks Visitor Surveys 2008 – 2022 – Most recent visit to a NPWS park  
 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; 2022 n=1,310

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

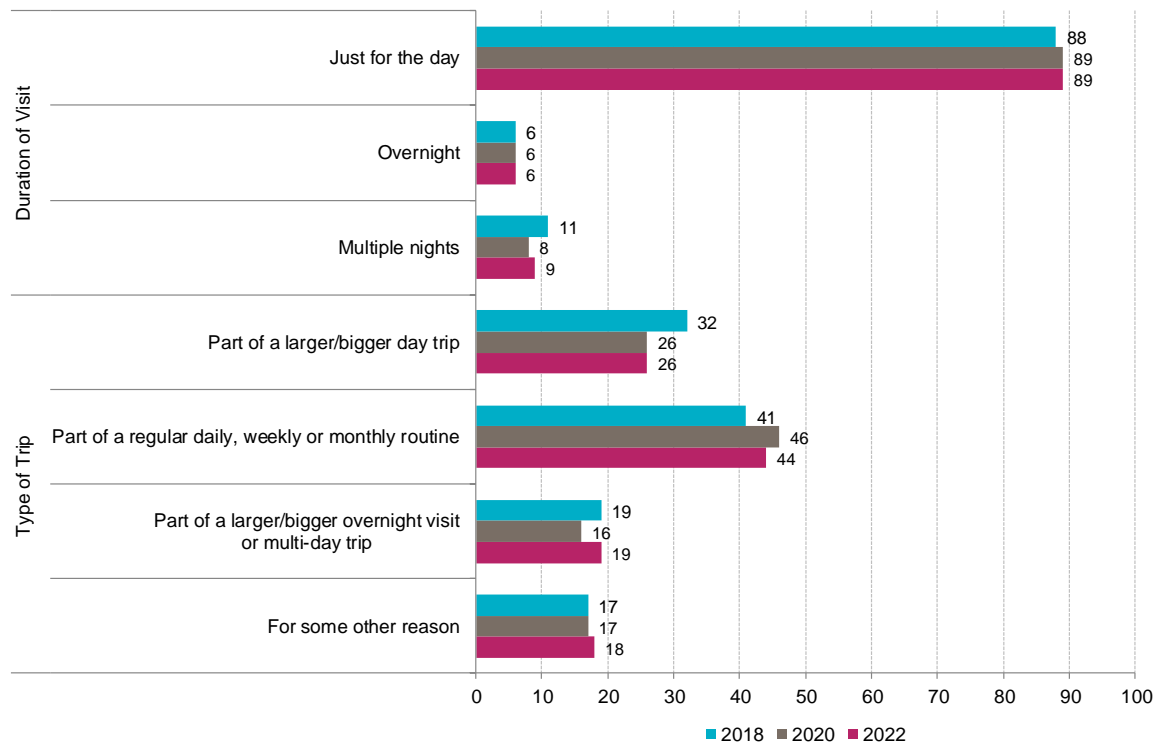
In 2018 and 2020 NPWS park visitors were asked a new question for each different NPWS park they visited in relation to their *duration* of visit. The top section of Chart H shows that almost nine in ten visits in each of 2018, 2020 and 2022 to NPWS parks were *just for the day* (88% - 2018; 89% - 2020 and 89% - 2022). One in fifteen visits were *overnight* (6% for each of 2018, 2020 and 2020). A slight decline in visits for *multiple nights* was observed from 2018 to 2020 (from 11% to 8%), with a slight rise observed in 2020 (9%).

There have been significant falls in the proportion of visitors accessing NPWS parks as *part of a larger/bigger day trip* from 2018 to 2022 (32% - 2018; 26% - 2020 and 2022 – see bottom section of Chart H). The proportion indicating that their visit to the park was *part of a regular daily, weekly or monthly routine* increased significantly from 41% in 2018 to 46% in 2020 (most likely due to COVID-19 exercise protocols impacting positively on regular visits), but declined slightly to 44% in 2022. The park visit being part of a larger/bigger overnight visit or multi-day trip returned to 2018 level in

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

2022 (19%), significantly higher than the 16% recorded in 2018. *Other reasons* for visiting an NPWS park have remained relatively constant over time (17% - 2018 and 2020; 18% - 2022).

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



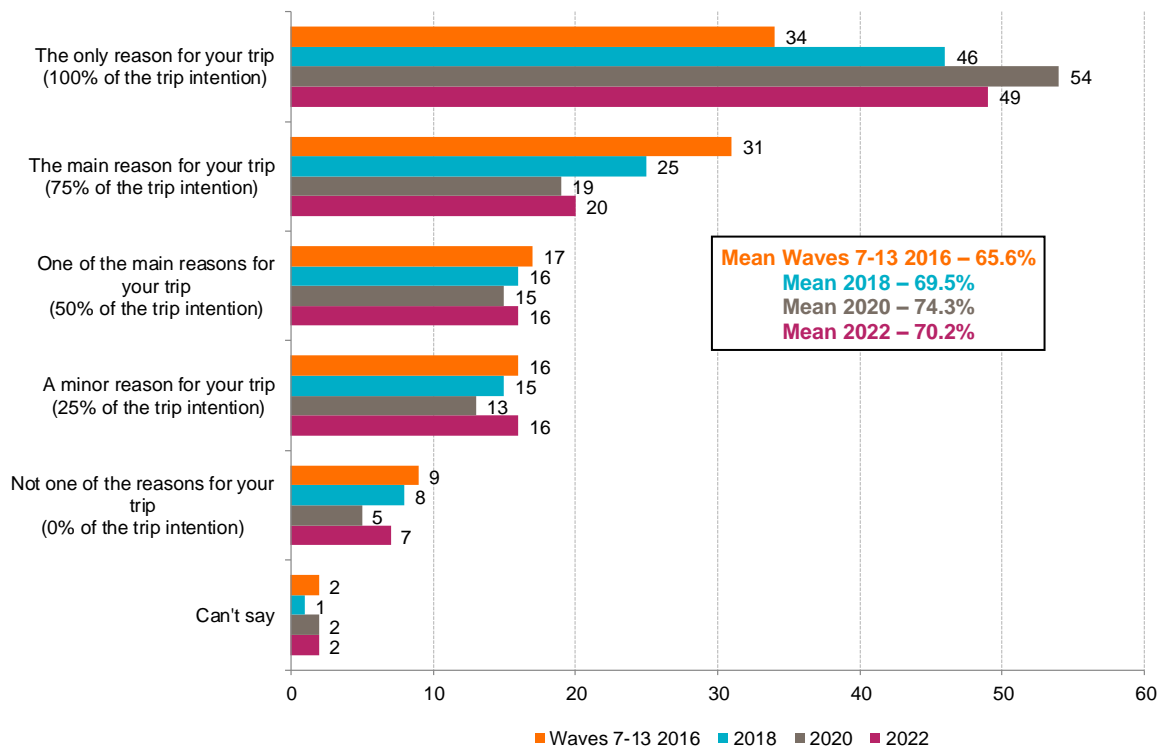
Source: NPWS Parks Visitor Surveys 2018-2022 asked duration of visit and type of trip to a NPWS park  
 Base: 2018 n=1,741; 2020 n=1,220; 2022 n=1,412

## 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 2018, 2020 and 2022. Chart I shows that around half of NPWS park visitors in 2022 indicated that their *only reason* for their trip was to visit the NPWS park (49%), lower than the result obtained in 2020 (54%), similar to the 2018 result (46%) and higher than the waves 7-13 2016 result (34%). It can also be seen that proportions are returning to 2018 levels, after the declines observed in 2020 for all other roles that the park visit had in terms of intention for one's trip, with 2022 proportions for the park being the *main reason for one's trip* (20%), *one of the main reasons for one's trip* (16%), *a minor reason for one's trip* (16%) and *not one of the reasons for one's trip* (7%).

The increase in the proportion in 2020 indicating that their NPWS park visit was their *only reason* for their trip compared with other years is again likely the result of COVID-19 restrictions. As a result, 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). The mean score in 2022 declined to 70.2% from 2020 levels, a result significantly lower than the 2020 mean.

Chart I: Role of NPWS Park Visit in Trip Decision



Source: NPWS Parks Visitor Surveys 2016 – 2022 asked role of visit  
 Base: Wave 7-13 2016 n=849, 2018 n=1,741; 2020 n=1,220; 2022 n=1,412

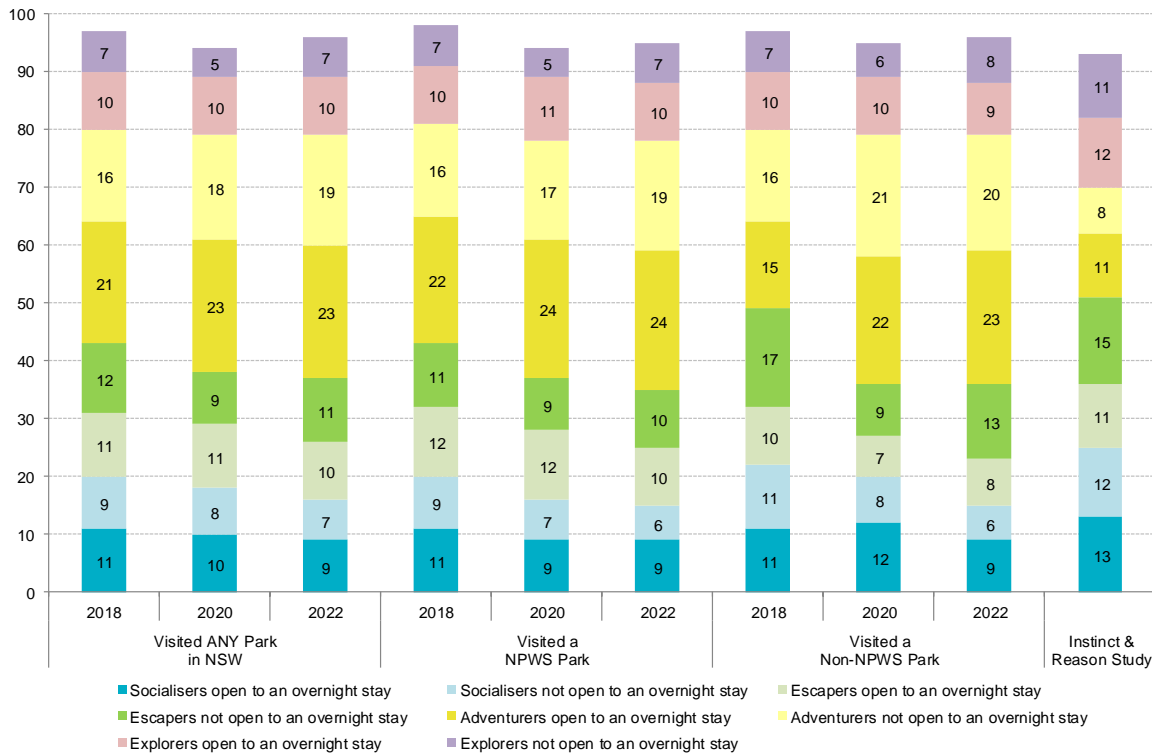
## 1.8 Park Visitor Needs Base Segmentation

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, 2020 and 2022 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 (22% - 2018; 24% 2020 & 2022 NPWS visitors; 11% Instinct and Reason study). So too are *Adventurers not open* to an overnight stay (19% - 2022; 17% - 2020; 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



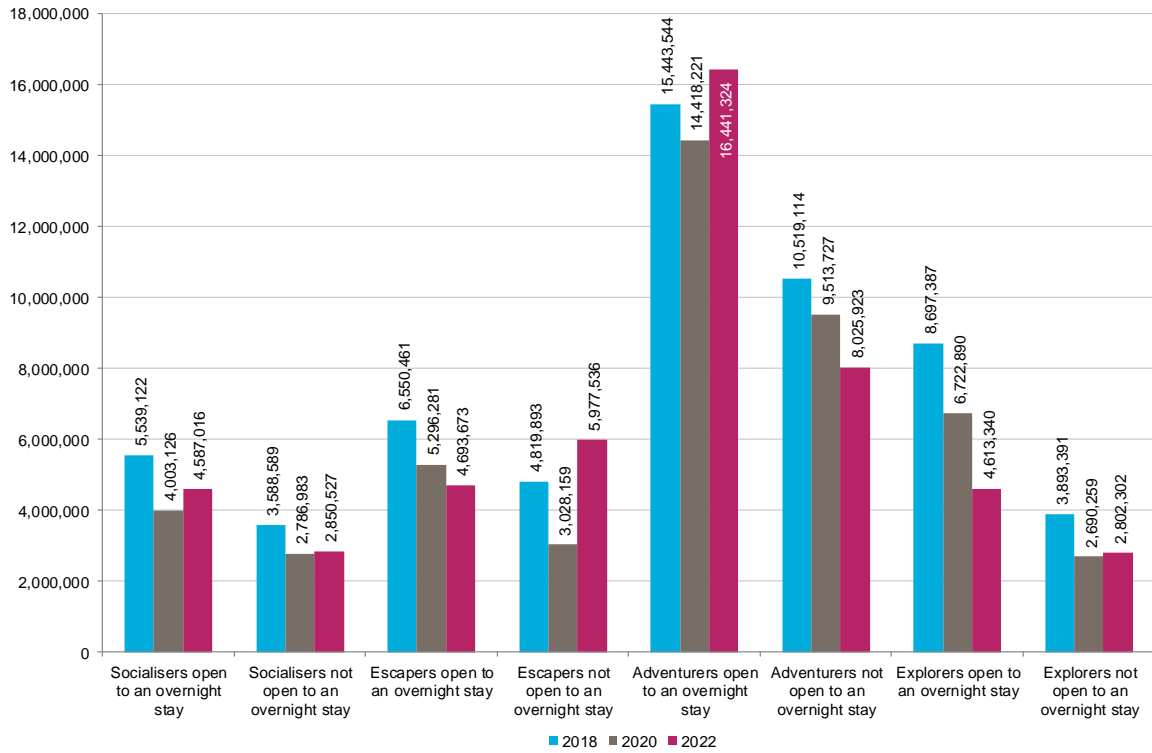
Source: NPWS Parks Visitor Surveys 2018-2022 – Visited a park in NSW in the last 4 weeks; Instinct & Reason Need-based Segmentation  
 Base: NPWS Parks Visitor Survey 2018 - n=2,094; 2020 n=1,450; 2022 n=1,629; Instinct and Reason Study – n=2,542

As might be expected, given the decline in NPWS visits from 2018 to 2020, the number of visits in each segment declined over this period. However, visits to specific segments did not increase with the increase in overall visits from 2020 to 2022 for the following: *Escapers not open to an overnight stay*; *Adventurers not open to an overnight stay*; and *Explorers open to an overnight stay*. The largest proportional increases in visits from 2020 to 2022 were for *Escapers not open to an overnight stay* and *Adventurers open to an overnight stay*, with both recording their highest levels of visitation in 2022.

*Adventurers open to an overnight stay* contributed the most visits in 2022 (16.4m - Chart K), the highest recorded visits in any one segment so far. *Adventurers not open to an overnight stay* contributed the next highest proportion of visits (8.0m), down from 9.5m in 2022 and 10.5m in 2018. The third most visits in 2022 came from *Explorers not open to an overnight stay* (6.0m), up from 3.0m in 2020.

*Adventures open to an overnight stay* contribute a greater proportion of visits than they represent among visitors. This was evident in all year (2018 - 22% visitors; 26% visits; 2020 - 24% visitors; 30% visits; and 2022 – 24% visitors, 33% visits). *Adventurers not open to an overnight stay* contributed more to visits than they represented amongst the visitor population in both 2018 (18% visits c.f. 16% visitors) and in 2020 (20% visits c.f. 17% visitors), but this was not the case in 2020 (16% visits c.f. 19% visitors).

Chart K: NPWS Visits by Sub-Segment



Source: NPWS Parks Visitor Surveys 2018-2022 – Visited a NPWS park in the last 4 weeks  
 Base: 2018 n=1,687; 2020 n=1,158; 2022 n=1,360



## 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, 2018 and 2020 to monitor and estimate the annual number of visits to NSW parks in 2022. 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 890 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, 2020 and 2022 and identify any trends in visitation since 2008.

### 2.2 Objectives of This Study

The main objective of the 2022 study was to provide a *reliable* estimate of annual NPWS park visitation (i.e. the total number of annual visits) for 2022, to be used to compare with results obtained in previous years (i.e. 2008, 2010, 2012, 2014, 2016, 2018 and 2020). 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 2022 with a precision similar to that obtained in previous years (i.e.  $\pm 4\%$  of the true number);

## **2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

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 and 2022, 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 the 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 2022 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) were undertaken and are detailed in the 2020 “Annual Visits to NPWS Managed Parks in New South Wales” report.

The three major research tasks required for the 2022 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 a history of changes), to ensure that survey results would be comparable and whatever changes (i.e. minor modifications to the questionnaire, sampling frame 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 the role of the park visit in the overall decision to travel;
  - Report based on an existing segmentation of park visitors;

***2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks***

- Identify statistically significant differences in number of visits, demographic groups, participation in activities and satisfaction between 2008 and 2022; 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 4 January 2022, with the thirteenth and final wave concluded on 13 December 2022.

In order to be able to compare 2022 data with 2008, 2010, 2012, 2014, 2016, 2018 and 2020 results on a wave by wave basis, survey waves for 2022 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, 2018 and 2020 surveys, interviewing quotas (Table 1) were set for 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 2022	Sydney	Rem. NSW	ACT	Melbourne	Rem. VIC	Brisbane	Rem. SE QLD
Male 18-24 years	15	10	12	12	5	9	8
Male 25-34 years	26	14	16	22	7	15	11
Male 35-49 years	34	22	19	27	11	21	18
Male 50+ years	48	52	26	38	26	29	35
Female 18-24 years	14	9	9	11	5	9	8
Female 25-34 years	26	14	18	21	7	15	12
Female 35-49 years	34	23	20	27	12	21	20
Female 50+ years	53	56	30	42	27	31	38
<b>TOTAL</b>	<b>250</b>	<b>200</b>	<b>150</b>	<b>200</b>	<b>100</b>	<b>150</b>	<b>150</b>

Source: ABS: Census Population Estimates 2022

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

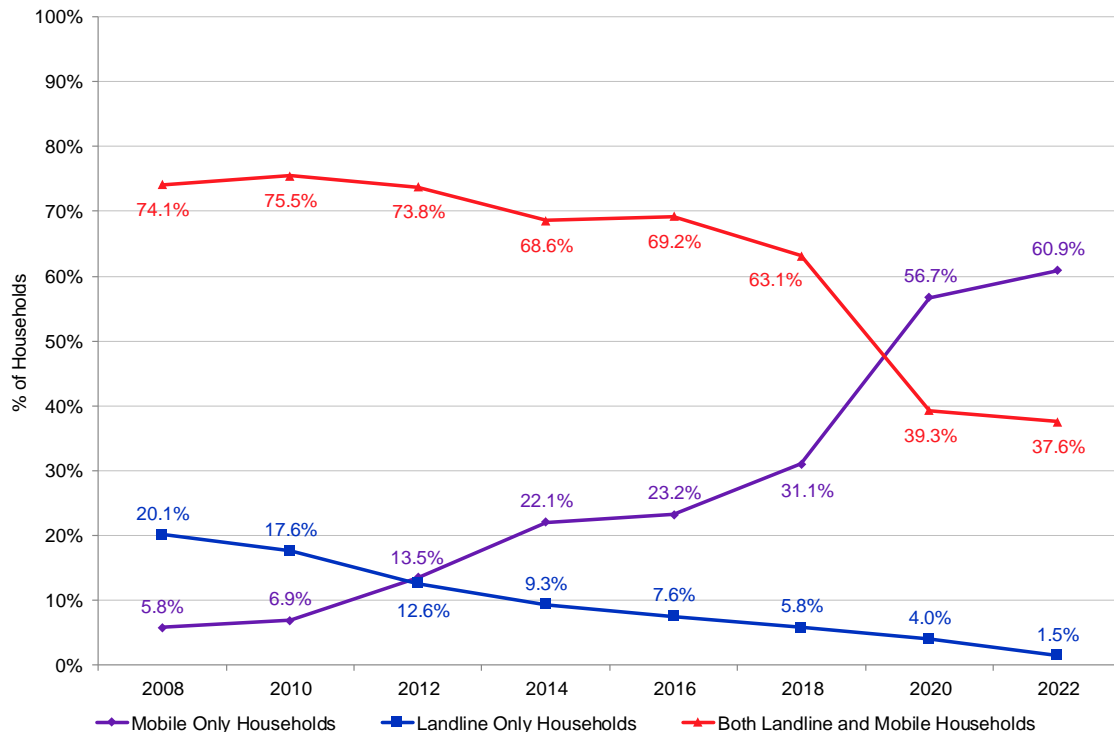
### 3.1.1 New Sampling Frame Used in 2012, 2014, 2016, 2018 and 2020

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<sup>10</sup> (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 60.9% of the households in the survey area come from solely mobile households in 2022 (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

<sup>10</sup> 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).

## **2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

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: 23.2% 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 31.1%. 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 2022 a total of 42.6% of numbers were called on a landline, with 50.2% of those surveyed coming from mobile only households (the proportion of mobile only households in the 2022 population was – 60.2%).

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).

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

**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 2022 survey commencing on January 4, 2022, 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<sup>11</sup>, in total and by state of respondent origin.

Please note that all holiday periods listed for 2022 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, 2020 and 2022, 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;
- 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;

---

<sup>11</sup> The visitation estimate does not include visits from non-surveyed states or regions within states.

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

- 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 2022 a National Day of Mourning was held on 22 September for Queen Elizabeth's death. This occurred in wave 11 2022.
- In 2018 the VIC Melbourne Cup Holiday spanned both waves 12 and 13;
- In 2016 and 2022 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, 2016, 2018, 2020 and 2022 surveys. This is because the 2010, 2014, 2016, 2018, 2020 and 2022 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

2021-22							Corresponding Wave		
Wave	Visitation Period <sup>1</sup>	Survey Period <sup>2</sup>	NSW	VIC	ACT	SE QLD	2008 -2009	2012 -2013	Other Yrs
Wave 1	8 Dec 2021 - 10 Jan 2022	4 Jan- 10 Jan 2022	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 11	Wave 1
	<b>2022 Visits</b>	<b>5,125,791</b>	<b>2,502,236</b>	<b>1,548,873</b>	<b>379,843</b>	<b>694,839</b>			
	2020 Visits	4,155,797	1,890,767	660,478	339,802	1,263,185			
	2018 Visits	6,001,883	2,951,356	1,452,366	464,416	1,133,824			
	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	3 Jan- 7 Feb 2022	31 Jan- 7 Feb 2022	School Holidays Australia Day	School Holidays Australia Day	School Holidays Australia Day	School Holidays Australia Day	Wave 13	Wave 12	Wave 2
	<b>2022 Visits</b>	<b>6,666,797</b>	<b>6,399,839</b>	<b>174,127</b>	<b>57,624</b>	<b>35,207</b>			
	2020 Visits	3,894,097	3,485,516	127,634	60,853	219,554			
	2018 Visits	5,035,352	4,220,729	406,316	107,339	300,975			
	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	1 Feb- 9 Mar 2022	28 Feb- 9 Mar 2022					Wave 1	Wave 13	Wave 3
	<b>2022 Visits</b>	<b>4,383,104</b>	<b>4,284,888</b>	<b>51,302</b>	<b>16,734</b>	<b>30,180</b>			
	2020 Visits	4,167,266	3,990,248	85,290	11,372	79,476			
	2018 Visits	3,969,308	3,791,793	42,297	42,721	92,487			
	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 - 2022

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; 2022 n=15,623

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.



## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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

2021-22							Corresponding Wave		
Wave	Visitation Period <sup>1</sup>	Survey Period <sup>2</sup>	NSW	VIC	ACT	SE QLD	2008-2009	2012-2013	Other Yrs
Wave 4	1 Mar-5 Apr 2022	28 Mar-5 Apr 2022	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, 2022 Easter 2008, 2016, 2018	Wave 2	Wave 1	Wave 4
	<b>2022 Visits</b>	<b>5,150,795</b>	<b>4,860,500</b>	<b>212,805</b>	<b>24,641</b>	<b>52,849</b>			
	2020 Visits	2,851,078	2,599,948	129,119	23,420	98,108			
	2018 Visits	4,235,333	3,699,268	438,565	17,970	79,531			
	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	30 Mar-5 May 2022	26 Apr-5 May 2022	Easter 2010, 12, 14, 16, 18, 20, 22 School Holidays 2008-2022 Anzac Day	Easter 2010, 12, 14, 16, 18, 20, 22 School Holidays 2008-2022 Anzac Day	Easter 2010, 12, 14, 16, 18, 20, 22 School Holidays 2008-2022 Anzac Day	Easter 2010, 12, 14, 16, 18, 20, 22 School Holidays 2008-2022 Labour Day 2016 Anzac Day	Wave 3	Wave 2	Wave 5
	<b>2022 Visits</b>	<b>3,092,127</b>	<b>2,751,794</b>	<b>230,797</b>	<b>40,655</b>	<b>68,881</b>			
	2020 Visits	2,508,629	2,506,059	0	2,393	0			
	2018 Visits	5,707,920	5,457,713	167,069	21,627	61,498			
	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	26 Apr-31 May 2021	23 May-31 May 2022	School Holidays 2018		School Holidays 2008-2018 Reconciliation Day 2022	Labour Day 2008, 10, 12, 16, 18, 20, 22	Wave 4	Wave 3	Wave 6
	<b>2022 Visits</b>	<b>1,853,887</b>	<b>1,671,305</b>	<b>25,360</b>	<b>45,217</b>	<b>112,005</b>			
	2020 Visits	943,004	906,644	0	37,673	0			
	2018 Visits	4,380,548	4,183,209	82,662	33,320	81,346			
	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	24 May-27 Jun 2022	20 Jun-27 Jun 2022	Queen's B'day	Queen's B'day School Holidays 2008, 2010 & 2020	Queen's B'day School Holidays 2020 Reconciliation Day 2018, 22	Queen's B'day 2008, 2010 & 2012 School Holidays 2008, 2010, 2016, 2020	Wave 5	Wave 4	Wave 7
	<b>2022 Visits</b>	<b>4,381,875</b>	<b>4,193,702</b>	<b>45,371</b>	<b>35,549</b>	<b>107,253</b>			
	2020 Visits	3,390,094	3,237,861	45,678	28,189	78,205			
	2018 Visits	5,509,430	5,258,648	100,760	36,978	113,030			
	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	21 Jun-26 Jul 2022	18 Jul-26 Jul 2022	School Holidays 2008-2022	School Holidays 2008-2022	School Holidays 2008-2022	School Holidays 2008-2022	Wave 6	Wave 5	Wave 8
	<b>2022 Visits</b>	<b>3,390,291</b>	<b>3,067,518</b>	<b>153,407</b>	<b>14,090</b>	<b>155,276</b>			
	2020 Visits	4,333,017	4,181,193	27,571	58,266	66,974			
	2018 Visits	4,022,510	3,808,907	94,154	23,850	95,592			
	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 - 2022

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; 2022 n=15,623

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.

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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

2021-22							Corresponding Wave		
Wave	Visitation Period <sup>1</sup>	Survey Period <sup>2</sup>	NSW	VIC	ACT	SE QLD	2008 -2009	2012 -2013	Other Yrs
Wave 9	21 Jul- 23 Aug 2022	15 Aug- 23 Aug 2022	School Holidays 2018		School Holidays 2018	Show Day 2008-2022			
	<b>2022 Visits</b>	<b>3,610,908</b>	<b>3,473,383</b>	<b>68,681</b>	<b>25,202</b>	<b>43,642</b>			
	2020 Visits	4,744,273	4,730,390	0	13,899	0			
	2018 Visits	4,952,062	4,818,122	69,641	48,204	16,080	Wave 7	Wave 6	Wave 9
	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	16 Aug- 20 Sep 2022	12 Sep- 20 Sep 2022		School Holidays 2016		Show Day 2018			
	<b>2022 Visits</b>	<b>2,856,721</b>	<b>2,616,186</b>	<b>201,600</b>	<b>24,172</b>	<b>14,763</b>			
	2020 Visits	4,155,330	4,129,274	0	26,612	0			
	2018 Visits	3,760,427	3,399,507	206,240	51,780	102,898	Wave 8	Wave 7	Wave 10
	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	13 Sep- 18 Oct 2022	10 Oct- 18 Oct 2022	School Holidays 2008-2022	School Holidays 2008-2022	School Holidays 2008-2022	School Holidays 2008-2022			
			Labour Day	Grand Final Holiday 2016, 2018, 2022	Labour Day, National Day of Mourning 2022	National Day of Mourning 2022			
			National Day of Mourning 2022	National Day of Mourning 2022	Community Day 2014, 2016, 2018	Queen's Birthday 2022			
	<b>2022 Visits</b>	<b>4,484,693</b>	<b>3,938,752</b>	<b>314,544</b>	<b>35,799</b>	<b>195,598</b>			
	2020 Visits	5,479,453	5,332,245	0	65,453	82,708	Wave 9	Wave 8	Wave 11
	2018 Visits	4,783,950	4,140,421	164,298	44,528	434,705			
	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	11 Oct- 15 Nov 2022	7 Nov- 15 Nov 2022	School Holidays 2018	Grand Final Holiday 2020, Melbourne Cup	School Holidays 2018 Family & Community Day 2012	Queen's Birthday 2012, 2014, 2016, 2018, 2020			
	<b>2022 Visits</b>	<b>3,514,734</b>	<b>3,118,664</b>	<b>347,996</b>	<b>16,131</b>	<b>31,943</b>			
	2020 Visits	4,373,118	4,267,590	77,999	11,585	15,757	Wave 10	Wave 9	Wave 12
	2018 Visits	3,134,101	2,990,896	49,110	18,114	75,974			
	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	8 Nov- 13 Dec 2022	5 Dec- 13 Dec 2022		Melbourne Cup 2018		School Holidays 2016, 2022			
	<b>2022 Visits</b>	<b>3,201,100</b>	<b>3,131,664</b>	<b>33,377</b>	<b>20,338</b>	<b>15,721</b>			
	2020 Visits	4,893,759	4,801,683	7,623	33,382	51,235	Wave 11	Wave 10	Wave 13
	2018 Visits	4,014,563	3,820,052	123,924	35,383	35,194			
	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 - 2022

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; 2022 n=15,623

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]?*

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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 manner 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

## **2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

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 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

## **2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

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, 2020 and 2022 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 and 2022 surveys.

### 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:



## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

**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 and 2022 surveys.

### 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<sup>12</sup> 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.

---

<sup>12</sup> 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).



## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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 INCOME 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 2022 survey, and compares them with results from the 2008, 2010, 2012, 2014, 2016, 2018 and 2020 surveys. 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. In 2020 average days in field increased to 8.85 in an effort to improve survey response (i.e. re-approach numbers already called).

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

## **2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

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 at least a 7-day period for the 2012 to 2022 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; 21.31% - 2020; and 26.25% - 2022. Mobile number response rates for this survey remain high over time and they remain well above the 2014 low (18.53%). For landlines, response rates have since been - 15.27% - 2016; 11.40% - 2018; 14.68% - 2020 and 12.32% - 2022, 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. 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 have been conducted by Roy Morgan since 2018 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. Since 2008 this survey has averaged a response rate of 16.15%, compared with an average response rate of 8.85% for shared cost surveys. 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.

It is also encouraging that the 2022 response rate (21.19%) is the highest for all survey years.

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

Table 3: Response Rate - NSW Parks Survey

Sample Outcomes (No.)	NSW Parks Visitation Survey								
	2022		2020	2018	2016	2014	2012	2010	2008
	W1-13	AVE	AVE	AVE	AVE	AVE	AVE	AVE	AVE
Long Interview s <sup>1</sup>	1,631	125	112	161	164	160	141	140	149
Short Interview s <sup>2</sup>	13,992	1,076	1,091	1,042	1,042	1,044	1,063	1,063	1,060
<b>Total Interviews</b>	<b>15,623</b>	<b>1,202</b>	<b>1,203</b>	<b>1,203</b>	<b>1,206</b>	<b>1,204</b>	<b>1,204</b>	<b>1,203</b>	<b>1,209</b>
Refusals	53,547	4,119	4,587	4,817	4,111	5,854	4,856	5,008	3,226
Terminates	3,030	233	365	552	890	2,231	1,967	2,489	1,530
Appointments <sup>3</sup>	1,529	118	396	554	445	256	243	371	788
<b>Total Eligible Households (HHs)</b>	<b>73,729</b>	<b>5,671</b>	<b>6,551</b>	<b>7,127</b>	<b>6,653</b>	<b>9,545</b>	<b>8,270</b>	<b>9,071</b>	<b>6,753</b>
Total Quota Failures <sup>4</sup>	10,653	819	1,368	1,086	765	880	735	1,090	518
Business Numbers <sup>5</sup>	8,190	630	550	830	536	779	734	n/a	n/a
<b>Total Contacts</b>	<b>92,572</b>	<b>7,121</b>	<b>8,470</b>	<b>9,042</b>	<b>7,954</b>	<b>11,204</b>	<b>9,738</b>	<b>10,161</b>	<b>7,271</b>
Computer Quota Fail prior to contact <sup>6</sup>	82	6	355	864	622	3,987	1,703	5,663	1,976
Engaged	89	7	512	476	174	258	130	85	17
No reply	9,561	735	7,150	8,783	8,059	5,709	3,690	2,612	1,261
Unobtainable	2,963	228	5,952	8,507	9,792	15,452	12,771	6,399	3,341
3+ Calls	6	0	13	28	18	2,571	1,958	799	742
Fax/modem	669	51	53	243	308	619	765	368	258
Answ ering Machine	208,201	16,015	17,975	15,654	7,947	5,480	4,282	924	628
<b>Total Not Contacted</b>	<b>221,571</b>	<b>17,044</b>	<b>32,009</b>	<b>34,556</b>	<b>26,920</b>	<b>34,075</b>	<b>25,299</b>	<b>16,850</b>	<b>8,223</b>
<b>Total Used Sample (Attempted)</b>	<b>314,143</b>	<b>24,165</b>	<b>40,479</b>	<b>43,598</b>	<b>34,874</b>	<b>45,279</b>	<b>35,038</b>	<b>27,011</b>	<b>15,494</b>
Long Interview s <sup>1</sup>	2.21%	2.21%	1.71%	2.27%	2.47%	1.67%	1.71%	1.54%	2.21%
Short Interview s <sup>2</sup>	18.98%	18.98%	16.65%	14.62%	15.66%	10.94%	12.85%	11.72%	15.70%
<b>Total Interviews (Response Rate)</b>	<b>21.19%</b>	<b>21.19%</b>	<b>18.36%</b>	<b>16.89%</b>	<b>18.13%</b>	<b>12.62%</b>	<b>14.55%</b>	<b>13.26%</b>	<b>17.90%</b>
Refusals	72.63%	72.63%	70.02%	67.59%	61.80%	61.33%	58.72%	55.21%	47.77%
Terminates	4.11%	4.11%	5.58%	7.74%	13.37%	23.37%	23.79%	27.44%	22.66%
Appointments <sup>3</sup>	2.07%	2.07%	6.04%	7.78%	6.69%	2.68%	2.94%	4.09%	11.67%
<b>Total Eligible Households (HHs)</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>

Source: NPWS Parks Visitor Surveys 2008 – 2022; 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.

### 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. 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.

It would appear that travel habits, while increasing, have not returned to pre-COVID levels observed from 2008 to 2018. The 2022 strike rate of 10.44%, whilst increasing on 2020 levels (9.30%), as not returned to the average levels observed from 2008 to 2018 (12.66%). It would appear that post-COVID a ‘new normal’ behaviour has been adopted. In this instance, smaller proportions of people are visiting any type of park in NSW in 2022 than was the case pre-COVID.

Table 4: Survey Strike Rates<sup>13</sup>

Survey Region	2022	2020	2018	2016	2014	2012	2010	2008	2007 Pilot Estimate
Sydney	23.73%	23.74%	29.01%	30.16%	29.61%	24.86%	25.15%	25.78%	28.64%
Remainder NSW	19.12%	16.09%	24.81%	24.77%	23.97%	22.07%	21.24%	23.10%	25.58%
<b>Total NSW</b>	<b>21.68%</b>	<b>20.34%</b>	<b>27.14%</b>	<b>27.77%</b>	<b>27.10%</b>	<b>23.62%</b>	<b>23.45%</b>	<b>24.49%</b>	<b>27.28%</b>
Melbourne	1.46%	0.81%	2.07%	1.72%	1.65%	1.61%	1.38%	1.50%	2.23%
Remainder VIC	2.91%	1.54%	2.99%	3.67%	3.06%	3.07%	2.76%	2.40%	2.23%
ACT	10.09%	8.85%	14.25%	14.23%	14.63%	13.14%	12.82%	16.07%	9.80%
Brisbane	2.10%	1.33%	3.62%	3.69%	3.06%	2.82%	3.17%	3.59%	2.23%
Remainder SE QLD	2.36%	1.13%	3.28%	3.21%	3.01%	2.66%	3.32%	3.98%	2.23%
<b>Total Interstate</b>	<b>3.69%</b>	<b>2.68%</b>	<b>5.18%</b>	<b>5.18%</b>	<b>5.00%</b>	<b>4.56%</b>	<b>4.65%</b>	<b>5.29%</b>	<b>3.74%</b>
<b>Overall Strike Rate</b>	<b>10.44%</b>	<b>9.30%</b>	<b>13.42%</b>	<b>13.63%</b>	<b>13.27%</b>	<b>11.71%</b>	<b>11.66%</b>	<b>12.29%</b>	<b>12.57%</b>

Source: NPWS Parks Visitor Surveys 2008 - 2022

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; 2022 n=15,623.

### 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 the 2008 to 2022 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 an additional question on self-reported disability status was added for all those who had visited a park NSW in the last 4 weeks. These questions have been retained for 2022.

Overall questionnaire length increased from 2.79 minutes in 2020 to 3.06 minutes in 2022 (see Table 6). The reason for the overall increase in questionnaire length was the greater proportions who had visited a park in NSW in the last 4 weeks in 2022, compared with 2020, where the NSW bushfires restricted access to parks and the COVID-19 restrictions restricted movement to and within NSW. For visitors to parks in NSW average questionnaire length increased from 8.36 minutes in 2020 to 8.81 minutes in 2022 (see Table 5).

<sup>13</sup> 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.

Table 5: Average Questionnaire Length by Visitor Type and Year

Average Questionnaire Length (mins)	Park Visitors							
	2022	2020	2018	2016	2014	2012	2010	2008
NSW Questionnaire	8.80	8.36	8.35	4.81	5.70	5.73	5.21	4.92
Interstate Questionnaire	8.85	8.38	8.10	4.68	5.83	5.60	5.55	5.14
<b>Overall Questionnaire</b>	<b>8.81</b>	<b>8.36</b>	<b>8.29</b>	<b>4.78</b>	<b>5.73</b>	<b>5.70</b>	<b>5.29</b>	<b>4.98</b>
Average Questionnaire Length (mins)	Park Non-Visitors							
	2022	2020	2018	2016	2014	2012	2010	2008
NSW Questionnaire	2.56	2.37	2.48	2.05	2.05	2.00	1.54	1.45
Interstate Questionnaire	2.30	2.14	2.22	2.09	1.83	1.76	1.33	1.24
<b>Overall Questionnaire</b>	<b>2.38</b>	<b>2.21</b>	<b>2.31</b>	<b>2.20</b>	<b>1.90</b>	<b>1.84</b>	<b>1.40</b>	<b>1.31</b>

Source: NPWS Parks Visitor Surveys 2008 - 2022  
 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; 2022 n=15,623.

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							
	2022	2020	2018	2016	2014	2012	2010	2008
Average Questionnaire Length (mins)	3.06	2.79	3.11	2.55	2.41	2.29	1.85	1.76

Source: NPWS Parks Visitor Surveys 2008 - 2022  
 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; 2022 n=15,623.

## 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 the fieldwork phase, 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:

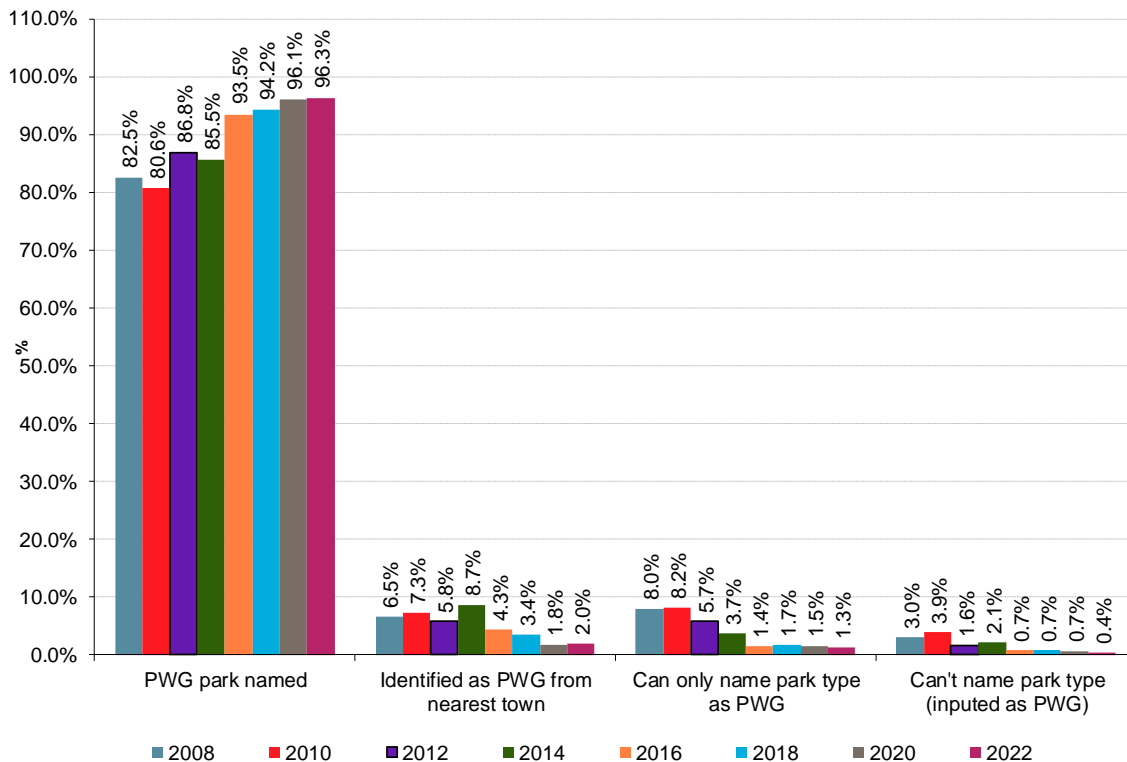
1. Roy Morgan received all other specify/can't say responses pertaining to park name/park location/park type for review;
2. Roy Morgan conducted a web search based on the information given by the respondent—i.e. the alias given or the geographical area in which they believed the park was located. In 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 98.3% of all parks identified in 2022 being named directly by the respondent (via their name or the nearest town to them, up from 89.1% in 2008)—the highest level recorded. In addition, the proportion of parks identified only by

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

the respondent naming the park *type* is declining over time (8.0% - 2008 1.3% - 2022), while the proportion of parks imputed in 2022 was the lowest recorded (0.4%). This indicates that either park allocation is becoming increasingly efficient with time, or respondents are becoming more knowledgeable about the parks they visit, or both.

Chart 2: Allocation of Park Type by Method<sup>14</sup>



Source: NPWS Parks Visitor Surveys 2008 - 2022

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; 2022 n=15,623

## 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 2022, 2020, 2018, 2016, 2014, 2012 and 2010 surveys

<sup>14</sup> 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).



## **2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

and 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 to 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, 2020 and 2022 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 60% of

## **2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

households in 2022, up from just 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 2.4% of the overall 2022 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:

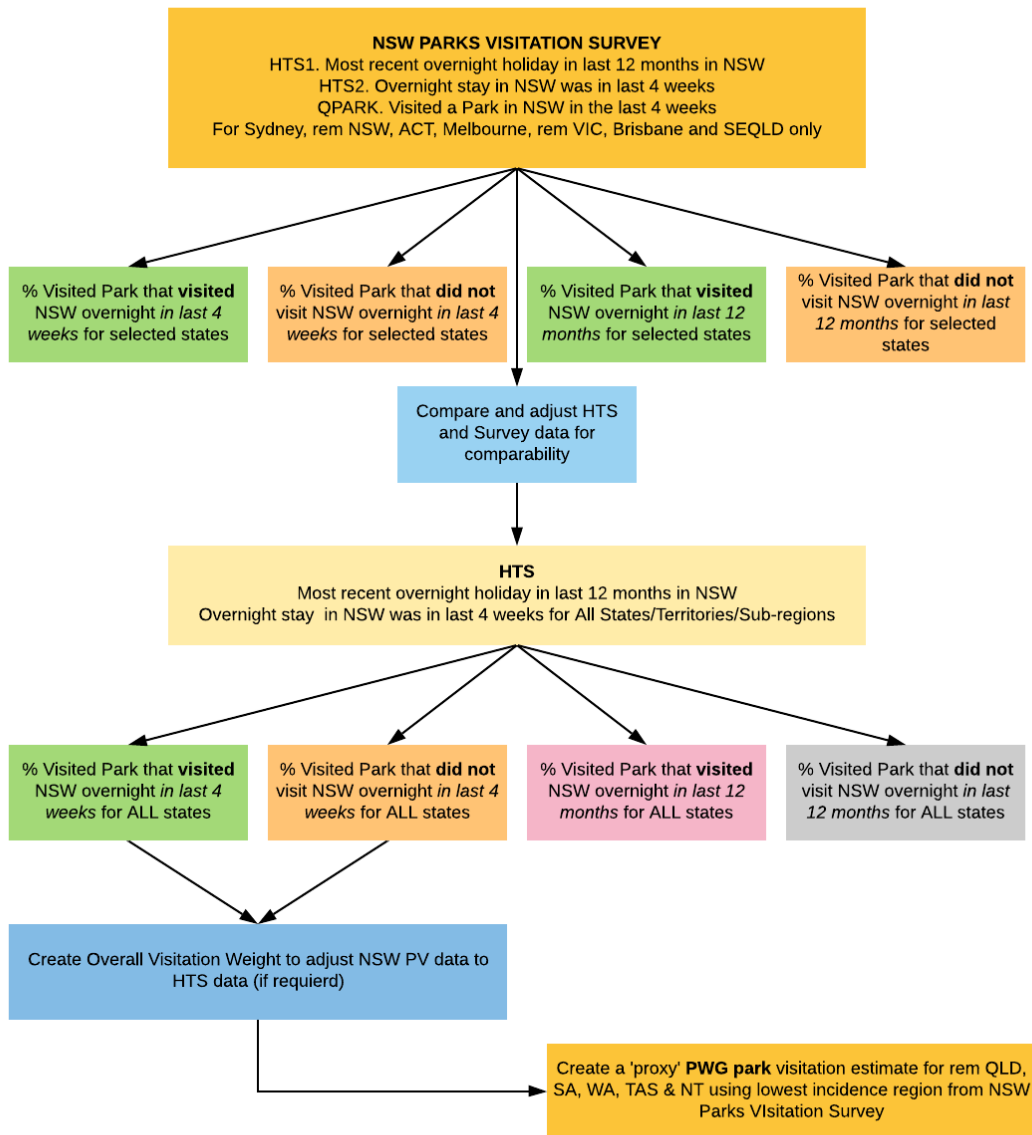
1. Calculate visitation for the seven regions of Australia that were surveyed (i.e. Sydney, Remainder NSW, ACT, Melbourne, Remainder VIC, Brisbane and Remainder Southeast Queensland).
2. Using comparative questions placed on the NSW Parks Visitation Survey with the same questions asked on the Roy Morgan 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 approximately 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);

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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<sup>15</sup>;
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)<sup>16</sup>;
5. Calculate the unweighted average number of visits to each NPWS park (i.e. exclude from the calculation the “can’t say” and blank<sup>17</sup> fields)—approximately 99.6% of responses in 2022;
6. Allocate the average number of visits to “can’t say” and blank fields—approximately 0.4% of NPWS responses in 2022; 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*<sup>18</sup> 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<sup>19</sup> 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;

---

<sup>15</sup> 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 2022 surveys would not improve survey estimates for visitation to NPWS parks and, as a consequence, no adjustment was made to 2008 to 2022 survey data. The robust approach taken was not to attempt to edit these responses.

<sup>16</sup> 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).

<sup>17</sup> 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.

<sup>18</sup> A child is classified as being under 18 years of age.

<sup>19</sup> 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.

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

- 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<sup>20</sup> 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, 2018, 2020 and 2022, 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.

---

<sup>20</sup> 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, 2020 and 2022 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, 2020 and 2022 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 2022 annual NPWS park visitation estimate after the conclusion of waves 1-13 (and including calculation of visitation from non-surveyed states) is as follows:

40,499,304	Annual Adult Visitation Estimate
12,506,399	Annual Child Visitation Estimate
<b>53,005,703</b>	<b>Annual Total Visitation Estimate</b>

The 2008 and 2010 visitation estimates were adjusted to account for the change in sampling frame in 2012. The 2022 visitation estimate is the second highest recorded – lower than the 2018 estimate of 60,236,009. It is higher than the 2008 to 2016 estimates of 37,927,616, 33,843,626, 35,495,625, 39,436,048 and 51,661,944 respectively and the 2020 estimate of 50,085,238. 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 2022; 95.2% 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, the exception being in 2020 when it only contributed 4.8% of visits (due to bushfires and COVID-19 protocols restricting access to parks).

In 2022 visits from Sydney comprised 62.3% of all visits - the second highest proportion recorded (with bushfire/COVID-19 affected 2020 being the peak at 70.2%). The lowest proportion of visits was recorded for remainder southeast QLD in 2022 (1.1%).

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
<b>2022</b>	<b>31,751,784</b>	<b>15,226,327</b>	<b>624,037</b>	<b>1,147,200</b>	<b>747,720</b>	<b>857,951</b>	<b>571,508</b>	<b>50,926,528</b>
2020	34,924,746	12,461,219	717,023	440,873	210,769	642,187	386,109	49,782,927
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
<b>2022</b>	<b>62.3%</b>	<b>29.9%</b>	<b>1.2%</b>	<b>2.3%</b>	<b>1.5%</b>	<b>1.7%</b>	<b>1.1%</b>	<b>100.0%</b>
2020	70.2%	25.0%	1.4%	0.9%	0.4%	1.3%	0.8%	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 - 2022

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; 2022 n=15,623

### 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%. In 2022 the proportion of visits from households with no children was the lowest recorded at 4.5%.

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). In 2022 1 child households contributed 20.7% of child visits, returning closer to 2014 levels.

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
<b>2022</b>	<b>696,858</b>	<b>3,218,267</b>	<b>5,302,852</b>	<b>4,689,533</b>	<b>1,610,028</b>	<b>15,517,538</b>
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
<b>2022</b>	<b>4.5%</b>	<b>20.7%</b>	<b>34.2%</b>	<b>30.2%</b>	<b>10.4%</b>	<b>100.0%</b>
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 - 2022

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; 2022 n=15,623

Breakdown by region in Table 9 overleaf reveals that in 2016, the contribution of intrastate child visits to all child visits was at lowest recorded at 88.6% (89.5% in 2022; 95.5% 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% (10.5% in 2022; 4.5% 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
<b>2022</b>	<b>9,742,481</b>	<b>4,145,682</b>	<b>256,063</b>	<b>676,377</b>	<b>213,478</b>	<b>300,377</b>	<b>183,080</b>	<b>15,517,538</b>
2020	10,414,132	3,824,058	181,787	57,562	129,426	201,992	106,588	14,915,546
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
<b>2022</b>	<b>62.8%</b>	<b>26.7%</b>	<b>1.7%</b>	<b>4.4%</b>	<b>1.4%</b>	<b>1.9%</b>	<b>1.2%</b>	<b>100.0%</b>
2020	69.8%	25.6%	1.2%	0.4%	0.9%	1.4%	0.7%	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 - 2022  
 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; 2022 n=15,623

## 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 2022 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:

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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 2022 survey and compares adjustment factors with the 2020, 2018, 2016, 2014, 2012, 2010 and 2008 surveys.

Overall the non-response adjustment factor for 2022 was the highest of all seven surveys (0.7783), with the lowest adjustment factor occurring in 2014 the lowest (0.5953).

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

Table 10: Non-response Adjustment by Region 2022

Contact Type - Waves 1-13 2022	Total	Sydney	Rem NSW	ACT	Mel-bourne	Rem VIC	Bris-bane	Rem SE QLD
<b>Persons Contacted, Not Surveyed -</b>								
Yes - Visited a NSW Park <sup>1</sup>	1,343	607	286	235	91	42	56	26
No - Did Not Visit a NSW Park <sup>1</sup>	17,464	3,149	1,539	2,639	3,851	1,695	2,757	1,834
No definitive response given <sup>2</sup>	42,199	8,698	4,617	5,332	8,038	3,011	7,005	5,498
<b>Total Contacted, Not Surveyed</b>	<b>61,006</b>	<b>12,454</b>	<b>6,442</b>	<b>8,206</b>	<b>11,980</b>	<b>4,748</b>	<b>9,818</b>	<b>7,358</b>
Adjusted Yes - Not Surveyed <sup>3</sup>	4,136	1,888	937	655	263	110	181	101
Adjusted No - Not Surveyed <sup>3</sup>	56,870	10,566	5,505	7,551	11,717	4,638	9,637	7,257
<b>Persons Contacted, Surveyed -</b>								
Yes - Visited a NSW Park <sup>1</sup>	1,631	773	498	197	38	38	41	46
No - Did Not Visit a NSW Park <sup>1</sup>	13,992	2,485	2,106	1,755	2,564	1,266	1,911	1,905
<b>Total Contacted, Surveyed</b>	<b>15,623</b>	<b>3,258</b>	<b>2,604</b>	<b>1,952</b>	<b>2,602</b>	<b>1,304</b>	<b>1,952</b>	<b>1,951</b>
<b>Total Yes - Visited a NSW Park<sup>1</sup></b>	<b>5,767</b>	<b>2,661</b>	<b>1,435</b>	<b>852</b>	<b>301</b>	<b>148</b>	<b>222</b>	<b>147</b>
<b>Total No - Did Not Visit a NSW Park<sup>1</sup></b>	<b>70,862</b>	<b>13,051</b>	<b>7,611</b>	<b>9,306</b>	<b>14,281</b>	<b>5,904</b>	<b>11,548</b>	<b>9,162</b>
<b>Total Contacted</b>	<b>76,629</b>	<b>15,712</b>	<b>9,046</b>	<b>10,158</b>	<b>14,582</b>	<b>6,052</b>	<b>11,770</b>	<b>9,309</b>
<b>18 Yrs+ Population - Jan 2022</b>	<b>15,141,977</b>	<b>4,214,565</b>	<b>2,174,403</b>	<b>329,638</b>	<b>4,014,649</b>	<b>1,181,588</b>	<b>2,000,658</b>	<b>1,226,476</b>
<b>Wtd Yes Pop'n - Visited a NSW Park - All Contacts<sup>1,5</sup></b>	<b>1,255,438</b>	<b>713,710</b>	<b>344,941</b>	<b>27,651</b>	<b>82,994</b>	<b>28,959</b>	<b>37,803</b>	<b>19,380</b>
<b>% of Population - All Contacts</b>	<b>8.29%</b>	<b>16.93%</b>	<b>15.86%</b>	<b>8.39%</b>	<b>2.07%</b>	<b>2.45%</b>	<b>1.89%</b>	<b>1.58%</b>
<b>Wtd Yes Pop'n - Visited a NSW Park - All Surveyed<sup>1,6</sup></b>	<b>1,613,069</b>	<b>999,957</b>	<b>415,842</b>	<b>33,268</b>	<b>58,631</b>	<b>34,433</b>	<b>42,022</b>	<b>28,917</b>
<b>% of Population - All Surveyed</b>	<b>10.65%</b>	<b>23.73%</b>	<b>19.12%</b>	<b>10.09%</b>	<b>1.46%</b>	<b>2.91%</b>	<b>2.10%</b>	<b>2.36%</b>
<b>Non-response Adjustment Factor Waves 1-13<sup>7</sup> 2022</b>	<b>0.7783</b>	<b>0.7137</b>	<b>0.8295</b>	<b>0.8312</b>	<b>1.4155</b>	<b>0.8410</b>	<b>0.8996</b>	<b>0.6702</b>
Non-response Adjustment Factor Waves 1-13 <sup>7</sup> 2020	0.7711	0.6895	0.8437	0.7750	1.4155	1.2617	1.3344	1.5910
Non-response Adjustment Factor Waves 1-13 <sup>7</sup> 2018	0.7600	0.6847	0.7385	0.8246	1.3881	1.2183	1.0118	1.1532
Non-response Adjustment Factor Waves 1-13 <sup>7</sup> 2016	0.7667	0.7533	0.7285	0.7487	1.2293	0.6915	0.8049	0.9761
Non-response Adjustment Factor Waves 1-13 <sup>7</sup> 2014	0.5953	0.5927	0.5791	0.5883	0.6674	0.6673	0.6449	0.6686
Non-response Adjustment Factor Waves 1-13 <sup>7</sup> 2012	0.7040	0.6938	0.6692	0.7741	0.8687	0.8158	0.7877	0.9368
Non-response Adjustment Factor Waves 1-13 <sup>7</sup> 2010	0.6560	0.6094	0.6747	0.8155	0.9440	0.8841	0.7334	0.7841
Non-response Adjustment Factor Waves 7-13 <sup>7</sup> 2008	0.6927	0.7314	0.6424	0.7742	0.6623	0.4835	0.5705	0.6071

Source: NPWS Parks Visitor Surveys 2008 - 2022

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; 2022 n=73,729

1. Visited within the 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 2022. 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 2022

Non-response Adjustment 2022						
Wave 1	Wave 2	Wave 3	Wave 4	Wave 5	Wave 6	Wave 7
0.6564	0.7272	0.6543	0.7570	0.9562	0.8679	0.4012
Wave 8	Wave 9	Wave 10	Wave 11	Wave 12	Wave 13	Total
0.6275	0.8315	1.0506	0.7474	0.8412	0.8570	<b>0.7783</b>

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 2022 accounts for the second lowest proportion of total visits since surveying commenced (89.0% compared with 92.3% visits in 2020, 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). In fact, visits from Victorian residents was highest ever recorded in 2022 (6.6%), with residents from both Melbourne (5.0%) and from Remainder Victoria (1.6%) each recording their highest contributing to visits. This is likely to be response to lifting of Victoria's strict COVID-19 protocols, enabling Victorians to travel interstate.

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
2022 Unadjusted Adult visits	31,751,784	15,226,327	624,037	1,147,200	747,720	857,951	571,508	50,926,528
Adult Non-response Adjustment	22,903,294	12,764,396	524,186	1,641,164	635,532	780,022	387,084	39,635,677
Unadjusted Child visits	9,742,481	4,145,682	256,063	676,377	213,478	300,377	183,080	15,517,538
Child Non-response Adjustment	6,920,365	3,422,400	211,812	952,865	178,682	268,931	122,111	12,077,166
<b>Total Adjusted Visits</b>	<b>29,823,659</b>	<b>16,186,796</b>	<b>735,998</b>	<b>2,594,030</b>	<b>814,214</b>	<b>1,048,952</b>	<b>509,194</b>	<b>51,712,843</b>
% Contribution	57.7%	31.3%	1.4%	5.0%	1.6%	2.0%	1.0%	100.0%

Source: NPWS Parks Visitor Surveys 2008 - 2022  
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; 2022 n73,729

2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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	
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
	<b>Total Adjusted Visits</b>	<b>31,996,444</b>	<b>14,062,974</b>	<b>712,899</b>	<b>722,045</b>	<b>439,348</b>	<b>1,152,920</b>	<b>802,282</b>	<b>49,888,913</b>
	% Contribution	64.1%	28.2%	1.4%	1.4%	0.9%	2.3%	1.6%	100.0%
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
	<b>Total Adjusted Visits</b>	<b>33,322,568</b>	<b>19,218,058</b>	<b>946,231</b>	<b>2,602,281</b>	<b>795,114</b>	<b>1,705,350</b>	<b>917,785</b>	<b>59,507,387</b>
	% 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
	<b>Total Adjusted Visits</b>	<b>27,708,506</b>	<b>17,562,955</b>	<b>679,130</b>	<b>2,058,823</b>	<b>683,547</b>	<b>1,066,606</b>	<b>1,055,355</b>	<b>50,814,922</b>
	% 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
	<b>Total Adjusted Visits</b>	<b>23,405,872</b>	<b>12,052,045</b>	<b>592,899</b>	<b>748,326</b>	<b>474,490</b>	<b>947,575</b>	<b>386,232</b>	<b>38,607,440</b>
	% 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
	<b>Total Adjusted Visits</b>	<b>19,911,987</b>	<b>11,533,580</b>	<b>636,843</b>	<b>1,001,232</b>	<b>413,248</b>	<b>756,226</b>	<b>527,347</b>	<b>34,780,462</b>
	% Contribution	57.3%	33.2%	1.8%	2.9%	1.2%	2.2%	1.5%	100.0%

Source: NPWS Parks Visitor Surveys 2008 - 2022

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; 2022 n=73,729

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	
<b>2010</b>	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
	<b>Total Adjusted Visits</b>	<b>18,605,442</b>	<b>11,266,899</b>	<b>736,827</b>	<b>635,363</b>	<b>421,710</b>	<b>863,272</b>	<b>849,148</b>	<b>33,378,662</b>
	% Contribution	55.7%	33.8%	2.2%	1.9%	1.3%	2.6%	2.5%	100.0%
	<b>2008</b>	Unadjusted Adult visits	24,937,199	15,665,180	682,956	1,316,305	363,321	559,223	656,074
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
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
<b>Total Adjusted Visits</b>		<b>22,165,651</b>	<b>12,259,529</b>	<b>654,777</b>	<b>972,153</b>	<b>209,404</b>	<b>394,441</b>	<b>583,010</b>	<b>37,238,965</b>
% Contribution		59.5%	32.9%	1.8%	2.6%	0.6%	1.1%	1.6%	100.0%

Source: NPWS Parks Visitor Surveys 2008 - 2022  
 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; 2022 n=73,729

#### 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 2022 (December 2021 to June 2022) visits to NPWS parks were higher than those observed in 2020 (significantly higher in waves 1, 2, 4 and 6). This period coincides with the reduction in visits in 2020 due to bushfires and COVID-19 protocols - consistent with expectations. However, visitation was lower in 2022 than in 2020 from waves 8-13 (July-mid-December 2022), significantly lower in waves 9, 10 and 13. In 2020 this coincided with the COVID-rebound period, where visitors tended to undertake more visits, escaping the confines of their homes (induced by the removal of COVID-19 restrictions) to move outdoors. Therefore, whilst this

## **2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

decline in visits in the second half of 2022 compared with 2020 visits is surprising, it can be explained by the rebound in visitation observed in the second half of 2020.

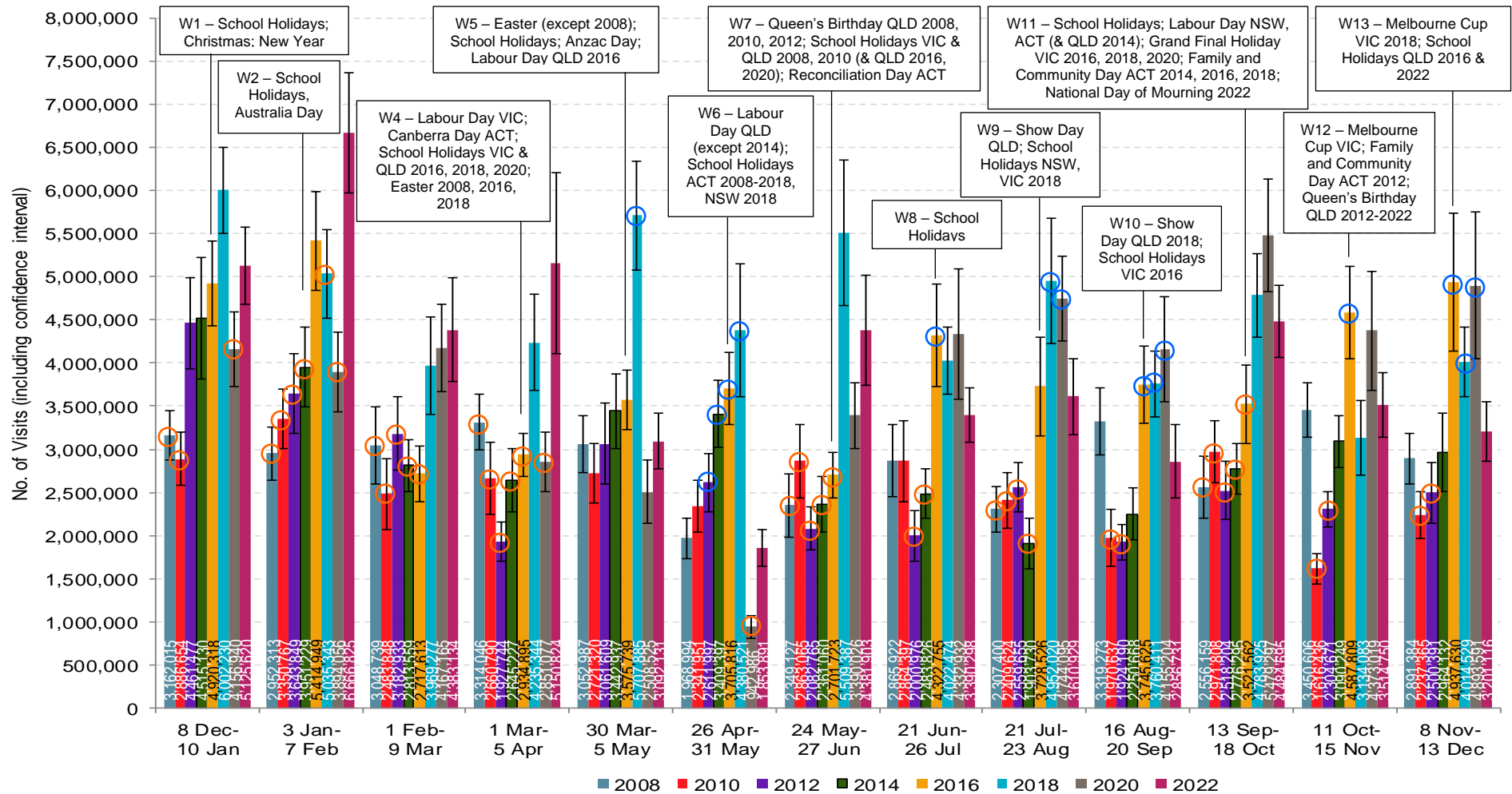
As 2020 was so unique (due to bushfires and COVID-19), comparison has been made with visits in 2018 – the year of highest visitation. In 2022 NPWS park visits were higher than in 2018 in waves 2-4 (January-March) and in wave 12 (mid-October-mid-November). The 2022 wave 2 visitation estimate was significantly higher than the corresponding 2018 wave 2 estimate. This period corresponds with summer and the summer school holidays, so it is not surprising that visits could exceed past records in 2022. However, for all other waves 2022 visits were lower than was observed in 2018 (significantly lower in waves 5, 6, 9, 10 and 13). It would appear that lower than expected visitation to NPWS parks in the second half of 2022 has impacted on overall visitation for 2022 (otherwise 2022 may have been a record year for visits).

As can be seen in Chart 4, that **adult visitation** in 2022 tends to mirror overall visitation. In fact, this trend typically holds for all survey years. Adult visitation in 2022 was higher than in 2020 for waves 1-7 and lower than in 2020 for waves 8-13, with 2022 estimates significantly higher than 2020 estimates for waves 2, 4 and 6.

In relation to **child visitation** to NPWS parks (see Chart 5), patterns were similar to adult visitation, with 2022 visits exceeding 2020 visits for waves 1-2 and 4-7. In comparison with 2018 visitation, 2022 visits were lower for waves 1, 3, 5-7 and 9-12. Child visitation therefore did not assist in lifting the overall 2022 visitation estimate above the record levels observed in 2018.

2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

Chart 3: Adjusted Annual Visitation Survey Estimate by Wave

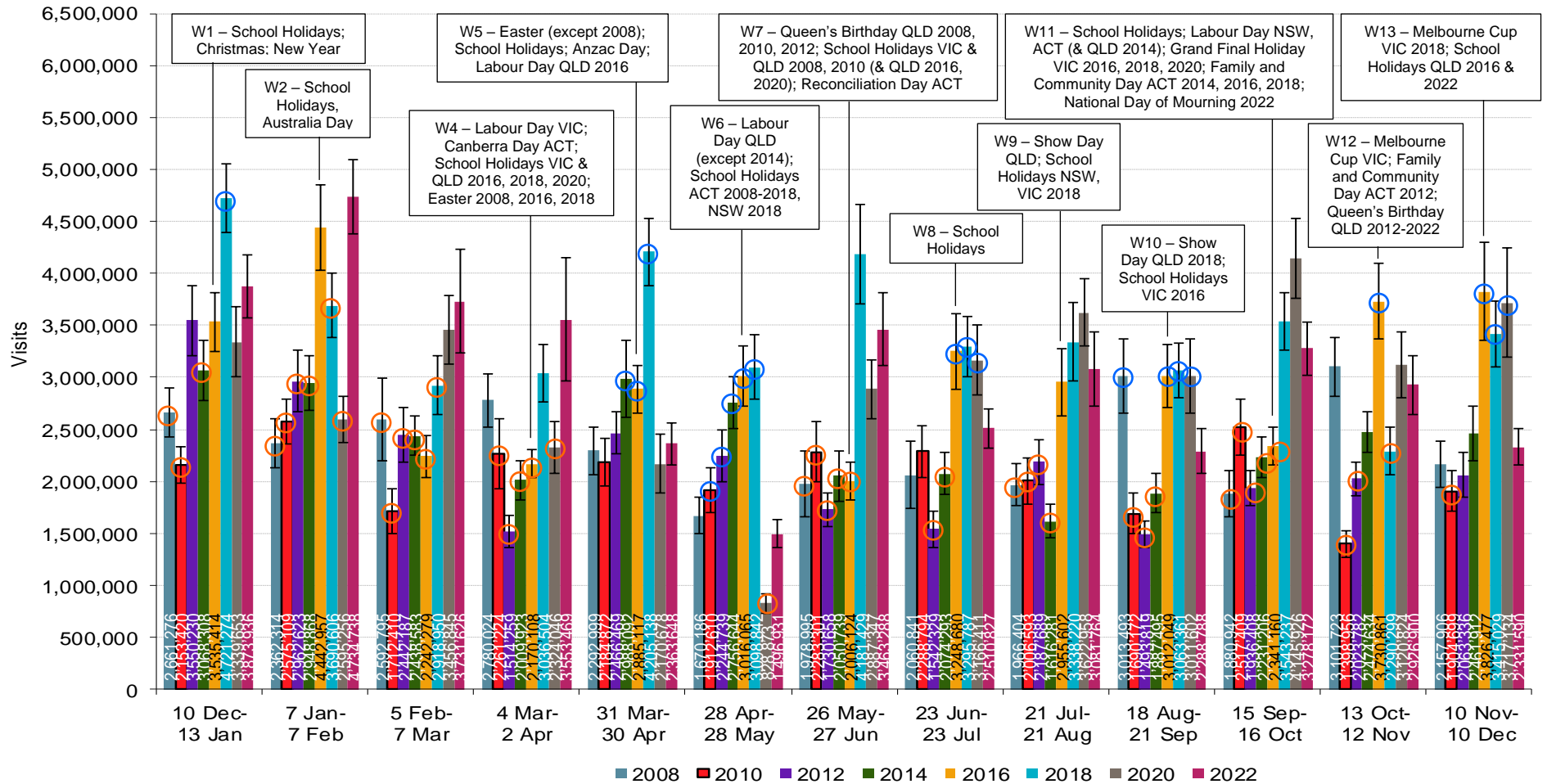


Source: NPWS Parks Visitor Surveys 2008 – 2022  
 Base: 2008 n=1,563; 2010 n=1,468; 2012 n=1,457; 2014 n=1,667; 2016 n=1,728; 2018 n=1,739; 2020 n=1,178; 2022 n=1,382

○ Significantly lower than 2022 estimate  
 ○ Significantly higher than 2022 estimate

2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

Chart 4: Adjusted Adult Visitation Survey Estimate by Wave

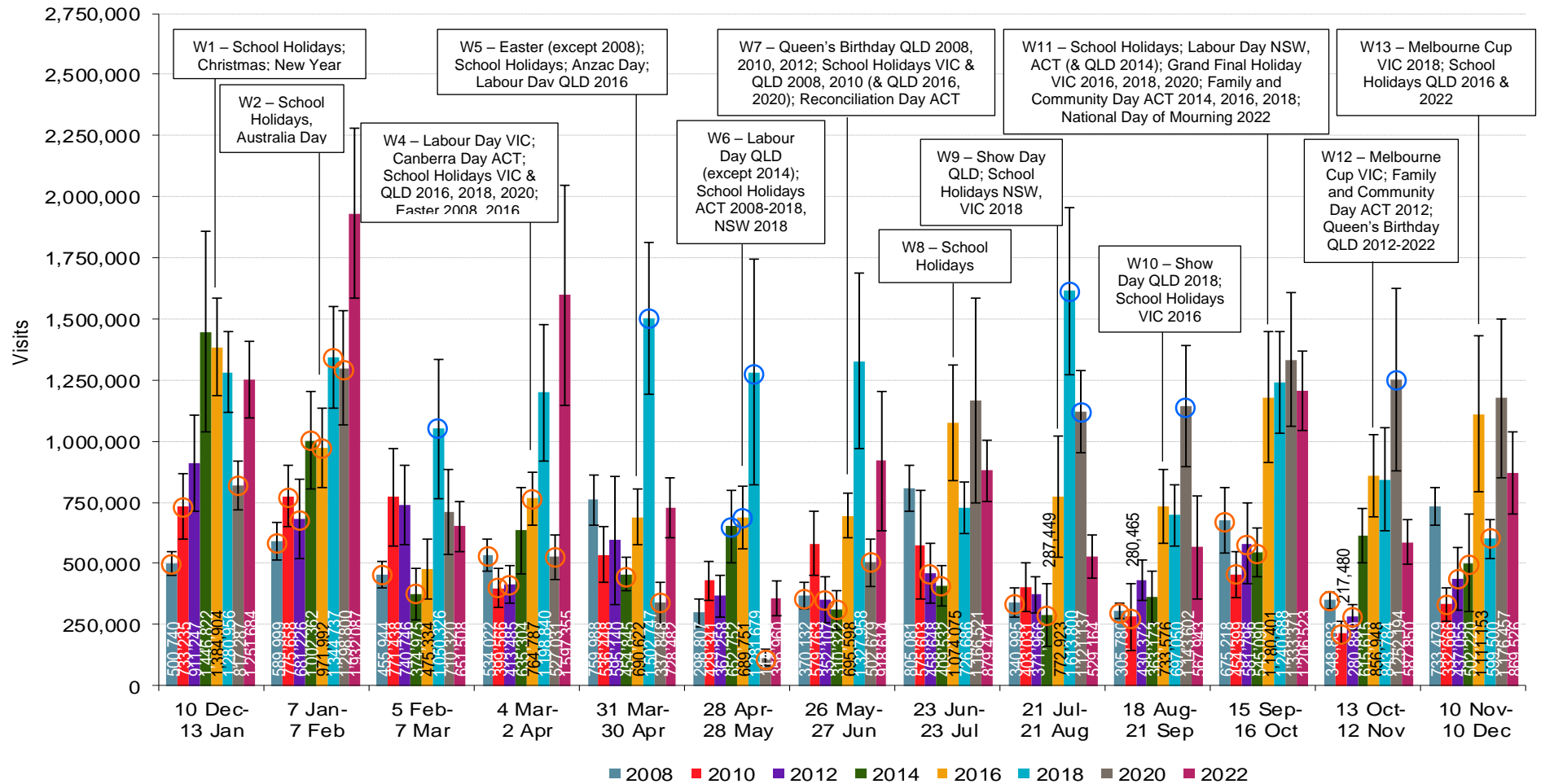


Source: NPWS Parks Visitor Surveys 2008 – 2022  
 Base: 2008 n=1,563; 2010 n=1,468; 2012 n=1,457; 2014 n=1,667; 2016 n=1,728; 2018 n=1,739; 2020 n=1,178; 2022 n=1,382

○ Significantly lower than 2022 estimate  
 ○ Significantly higher than 2022 estimate

2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

Chart 5: Adjusted Child Visitation Survey Estimate by Wave



Source: NPWS Parks Visitor Surveys 2008 – 2022  
 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; 2022 n=1,382

○ Significantly lower than 2020 estimate  
 ○ Significantly higher than 2020 estimate

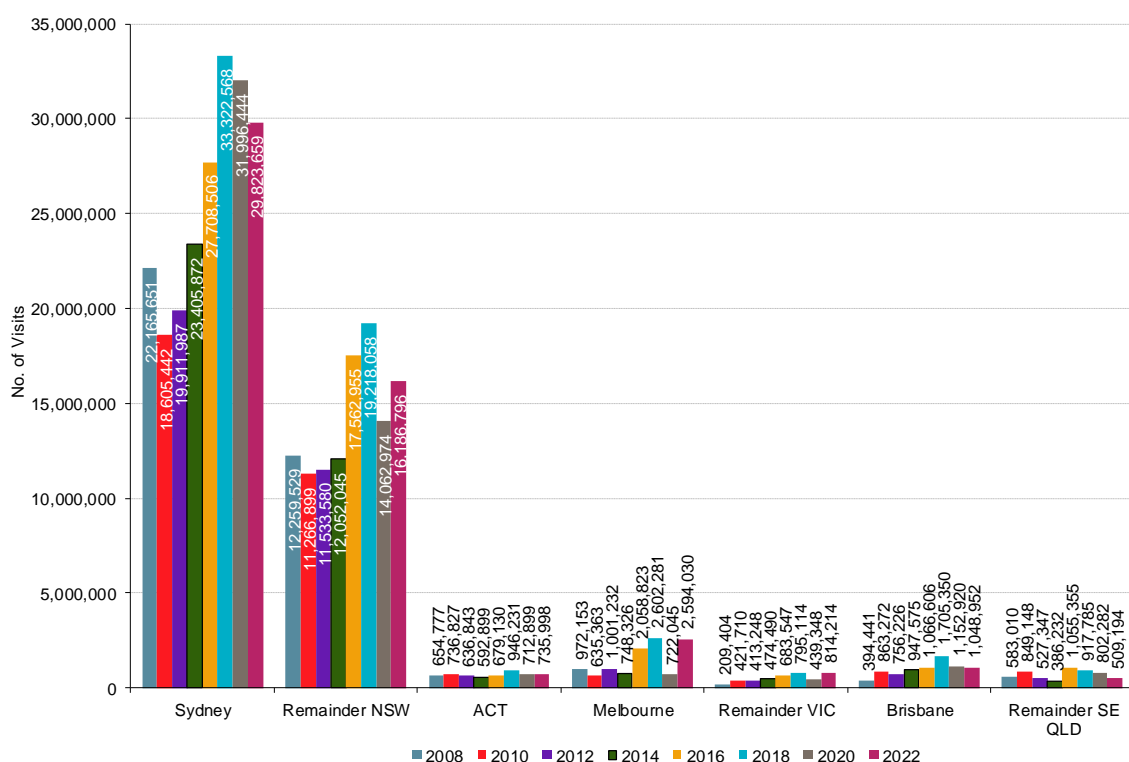


## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

### 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 respondents for each survey year. In 2022 the highest number of visits was recorded for visits from Victorian residents (3.4m), with the highest number of visits recorded from residents living in Remainder Victoria (814k) and the second highest recorded for Melbourne residents (2.6m). Visits from Sydney (29.8m), Remainder NSW (16.2m) and the ACT (2.6m) were the third highest numbers for these regions in 2022. Visits from Southern Queensland were low in 2022 (1.6m - fifth highest), with Brisbane registering only its fifth highest level of visits (1.0m) and Remainder of Southern and Southeast QLD recording its second lowest visit level (509k).

Chart 6: Visitation by Region of Origin



Source: NPWS Parks Visitor Surveys 2008 - 2022

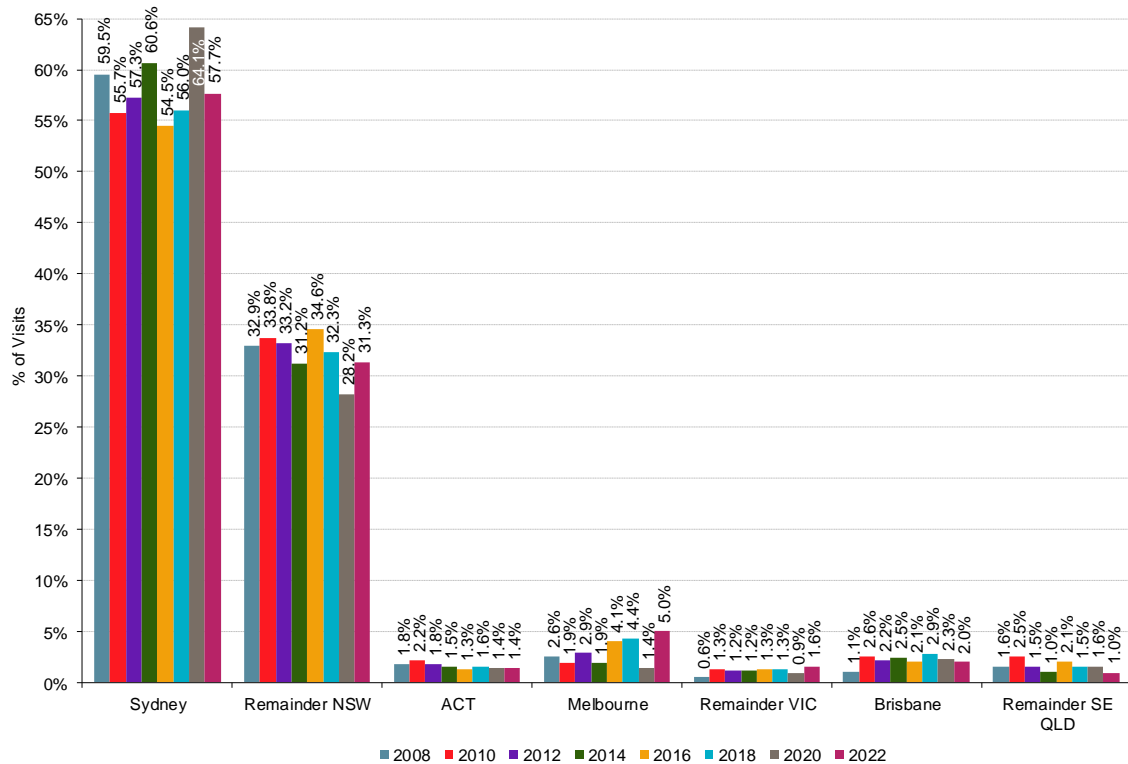
Base: 2008 n=1,563; 2010 n=1,468; 2012 n=1,457; 2014 n=1,667; 2016 n=1,728, 2018 n=1,739; 2020 n=1,178; 2022 n=1,382

In terms of percentage contribution to NPWS park visits, Chart 7 shows that the second lowest recorded proportions arose in 2022 for NSW (89.0%) ACT (1.4%) and Southeast Queensland (3.0%), with Remainder Southern and Southeast QLD recording its lowest ever proportional contribution (1.0%) and Brisbane recording its second lowest (2.0%).

However, interstate visitation recorded its second highest proportion of visitation in 2022 (11.0%), even with the low contribution from Southeast Queensland, because the proportional contribution to visits from Victoria was the highest (6.6%), with both Melbourne (5.0%) and Remainder Victoria (1.6%) recording their highest proportional contribution as well.



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



Source: NPWS Parks Visitor Surveys 2008 - 2022  
 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; 2022 n=1,382

### 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 (over time) 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.

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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 1,292,860 NPWS park visits were made in 2022 to NPWS parks from these non-surveyed regions (863,627 by adults and 429,233) by children). This number of visits is by far the largest number recorded from non-survey regions and is primarily caused by the removal of travel restrictions and border closures from the COVID-19 pandemic, increasing 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)	1,041,035	1,406,289	2,082,549	432,060	187,894	n/a
Visited PWG Park in last 4 w ks						1.56%
% Visited NSW Overnight in last 4 w ks	1.16%	0.75%	0.36%	1.12%	3.61%	1.51%
% PWG Visitors to Overnight Visitors	n/a	n/a	n/a	n/a	n/a	103.31%
% Estimate of PWG Visitors	1.20%	0.77%	0.37%	1.16%	3.73%	n/a
No. Adult PWG Visitors per w ave	12,476	10,897	7,746	4,999	7,008	n/a
Annual Adult PWG Park Visitors	162,188	141,655	100,692	64,992	91,100	n/a
Average PWG Park Visits per Adult	n/a	n/a	n/a	n/a	n/a	1.54
Annual Adult PWG Park Visits	249,846	218,215	155,112	100,118	140,336	n/a
% Child to Adult PWG Park visits	n/a	n/a	n/a	n/a	n/a	49.70%
Annual Child PWG Park Visits	124,177	108,456	77,093	49,760	69,749	n/a
Total Estimated Annual PWG Visits - 2022	374,022	326,671	232,205	149,877	210,085	n/a
<b>Contribution to Non-Survey Region PWG Park Visitation</b>	<b>28.9%</b>	<b>25.3%</b>	<b>18.0%</b>	<b>11.6%</b>	<b>16.2%</b>	<b>n/a</b>
Total Estimated Annual PWG Visits - 2020	103,046	55,062	33,298	4,669	250	n/a
<b>Contribution to Non-Survey Region PWG Park Visitation</b>	<b>52.5%</b>	<b>28.0%</b>	<b>17.0%</b>	<b>2.4%</b>	<b>0.1%</b>	<b>n/a</b>
Total Estimated Annual PWG Visits - 2018	88,343	163,638	298,933	143,519	34,148	n/a
<b>Contribution to Non-Survey Region PWG Park Visitation</b>	<b>12.1%</b>	<b>22.5%</b>	<b>41.0%</b>	<b>19.7%</b>	<b>4.7%</b>	<b>n/a</b>
Total Estimated Annual PWG Visits - 2016	207,797	293,060	232,394	74,828	49,469	n/a
<b>Contribution to Non-Survey Region PWG Park Visitation</b>	<b>24.2%</b>	<b>34.2%</b>	<b>27.1%</b>	<b>8.7%</b>	<b>5.8%</b>	<b>n/a</b>
Total Estimated Annual PWG Visits - 2014	68,231	199,484	177,138	49,594	65,483	n/a
<b>Contribution to Non-Survey Region PWG Park Visitation</b>	<b>12.2%</b>	<b>35.6%</b>	<b>31.6%</b>	<b>8.9%</b>	<b>11.7%</b>	<b>n/a</b>
Total Estimated Annual PWG Visits - 2012	232,371	293,766	94,502	80,981	13,542	n/a
<b>Contribution to Non-Survey Region PWG Park Visitation</b>	<b>32.5%</b>	<b>41.1%</b>	<b>13.2%</b>	<b>11.3%</b>	<b>1.9%</b>	<b>n/a</b>
Total Estimated Annual PWG Visits - 2010	94,608	207,009	109,588	37,865	15,894	n/a
<b>Contribution to Non-Survey Region PWG Park Visitation</b>	<b>20.3%</b>	<b>44.5%</b>	<b>23.6%</b>	<b>8.1%</b>	<b>3.4%</b>	<b>n/a</b>
Total Estimated Annual PWG Visits -2008	176,917	284,948	122,889	88,304	15,593	n/a
<b>Contribution to Non-Survey Region PWG Park Visitation</b>	<b>25.7%</b>	<b>41.4%</b>	<b>17.8%</b>	<b>12.8%</b>	<b>2.3%</b>	<b>n/a</b>

Source: NPWS Parks Visitor Survey 2022 and Roy Morgan Single Source Holiday Tracking Survey 2022  
Base: NPWS Parks Visitor Survey 2022 n=1,382; HTS 2022 – n=25,912

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

Table 17 shows that the overall NPWS park visitation estimate for 2022 is 53,005,703, with adult visits contributing 76% and child visits 24% 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 2020 non-survey regions contributed 2.4% each to the final annual adjusted NPWS park 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 COVID-19 restrictions limiting park visits to parks close to one's home from local residents. It returned to pre-2020 proportions in 2022 (86.8%). Overall, the 2022 NPWS park visitation estimate is 5.8% higher than the 2020 estimate of 50.1m and 12.0% lower than the 2018 estimate of 60.2m. This makes 2020 NPWS park visitation the second highest recorded.

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

Final Adjusted Annual NPWS Park Visitation Estimate 2020 <sup>1</sup>	Adult Visits		Child Visits		Total Visits	
	No.	%	No.	%	No.	%
Sydney	22,903,294	56.55%	6,920,365	55.33%	29,823,659	56.26%
Remainder NSW	12,764,396	31.52%	3,422,400	27.37%	16,186,796	30.54%
ACT	524,186	1.29%	211,812	1.69%	735,998	1.39%
Melbourne	1,641,164	4.05%	952,865	7.62%	2,594,030	4.89%
Remainder VIC	635,532	1.57%	178,682	1.43%	814,214	1.54%
Brisbane	780,022	1.93%	268,931	2.15%	1,048,952	1.98%
Remainder SE QLD	387,084	0.96%	122,111	0.98%	509,194	0.96%
Remainder QLD	249,846	0.62%	124,177	0.99%	374,022	0.71%
SA	218,215	0.54%	108,456	0.87%	326,671	0.62%
WA	155,112	0.38%	77,093	0.62%	232,205	0.44%
TAS	100,118	0.25%	49,760	0.40%	149,877	0.28%
NT	140,336	0.35%	69,749	0.56%	210,085	0.40%
<b>Total Australia 2022</b>	<b>40,499,304</b>	<b>100.00%</b>	<b>12,506,399</b>	<b>100.00%</b>	<b>53,005,703</b>	<b>100.00%</b>
<b>Margin of Error<sup>2</sup></b>	<b>±3.08%</b>	<b>n/a</b>	<b>±8.03%</b>	<b>n/a</b>	<b>±4.24%</b>	<b>n/a</b>
<b>Total Australia 2020</b>	<b>38,541,509</b>	<b>100.00%</b>	<b>11,543,729</b>	<b>100.00%</b>	<b>50,085,238</b>	<b>100.00%</b>
<b>Margin of Error<sup>2</sup></b>	<b>±3.07%</b>	<b>n/a</b>	<b>±7.41%</b>	<b>n/a</b>	<b>±4.07%</b>	<b>n/a</b>
<b>Total Australia 2018</b>	<b>45,333,817</b>	<b>100.00%</b>	<b>14,902,192</b>	<b>100.00%</b>	<b>60,236,009</b>	<b>100.00%</b>
<b>Margin of Error<sup>2</sup></b>	<b>±2.61%</b>	<b>n/a</b>	<b>±6.64%</b>	<b>n/a</b>	<b>±3.61%</b>	<b>n/a</b>
<b>Total Australia 2016</b>	<b>40,103,897</b>	<b>100.00%</b>	<b>11,558,047</b>	<b>100.00%</b>	<b>51,661,944</b>	<b>100.00%</b>
<b>Margin of Error<sup>2</sup></b>	<b>±2.89%</b>	<b>n/a</b>	<b>±6.24%</b>	<b>n/a</b>	<b>±3.64%</b>	<b>n/a</b>
<b>Total Australia 2014</b>	<b>31,674,661</b>	<b>100.00%</b>	<b>7,761,387</b>	<b>100.00%</b>	<b>39,436,048</b>	<b>100.00%</b>
<b>Margin of Error<sup>2</sup></b>	<b>±2.84%</b>	<b>n/a</b>	<b>±7.99%</b>	<b>n/a</b>	<b>±3.85%</b>	<b>n/a</b>
<b>Total Australia 2012</b>	<b>28,745,337</b>	<b>100.00%</b>	<b>6,750,287</b>	<b>100.00%</b>	<b>35,495,625</b>	<b>100.00%</b>
<b>Margin of Error<sup>2</sup></b>	<b>±2.90%</b>	<b>n/a</b>	<b>±8.02%</b>	<b>n/a</b>	<b>±3.87%</b>	<b>n/a</b>
<b>Total Australia 2010</b>	<b>27,262,279</b>	<b>100.00%</b>	<b>6,581,347</b>	<b>100.00%</b>	<b>33,843,626</b>	<b>100.00%</b>
<b>Margin of Error<sup>2</sup></b>	<b>±3.18%</b>	<b>n/a</b>	<b>±7.44%</b>	<b>n/a</b>	<b>±4.00%</b>	<b>n/a</b>
<b>Total Australia 2008</b>	<b>31,128,875</b>	<b>100.00%</b>	<b>6,798,741</b>	<b>100.00%</b>	<b>37,927,616</b>	<b>100.00%</b>
<b>Margin of Error<sup>2</sup></b>	<b>±3.34%</b>	<b>n/a</b>	<b>±4.40%</b>	<b>n/a</b>	<b>±3.54%</b>	<b>n/a</b>

Source: NPWS Parks Visitor Surveys 2008 – 2022 and Roy Morgan Single Source Holiday Tracking Surveys 2008-2022  
 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; 2022 n=1,382  
 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; 2022 n=25,912

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<sup>21</sup> for this study (at the industry accepted 95% confidence level) in 2022 are as follows:

- ±3.08% Annual Adult Visitation Estimate confidence limit
- ±8.03% Annual Child Visitation Estimate confidence limit
- ±4.24% Annual Total Visitation Estimate confidence limit**

This result compares to an overall confidence limit of ±4.07% in 2020, ±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 87% of NPWS visits to the overall visitation estimate in 2022, 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<sup>22</sup>

Number of NPWS Park Visits <sup>3</sup>	Sydney	Remainder NSW	ACT	Mel-bourne <sup>2</sup>	Remainder VIC	Brisbane	Remainder SE QLD
Adult Visits Confidence Limit <sup>1</sup>	±3.60%	±6.20%	±13.59%	±9.31%	±13.83%	±11.99%	±15.25%
Child Visits Confidence Limit <sup>1</sup>	±11.02%	±9.22%	±31.74%	±15.09%	±28.26%	±26.51%	±27.63%
Total Visits Confidence Limit <sup>1</sup>	±5.32%	±6.84%	±18.81%	±11.43%	±17.00%	±15.71%	±18.22%

Source: NPWS Parks Visitor Surveys 2008 - 2022

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; 2022 n=1,382

- 95% confidence level.
- Confidence limits of Australian regions not surveyed in 2022 (i.e. SA, WA, Tasmania, NT and remainder SE QLD) will be the same as the combined limit for Melbourne and remainder VIC (7.91% adult visits; 13.40% child visits; 19.35% total visits), as their estimation of PWG park visitation was based on the Victorian estimate.
- The confidence limits for the seven survey regions as a whole in 2022 are ±2.97% adult visits; ±7.84% child visits; and ±4.11% total visits.

<sup>21</sup> 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:

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

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

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.

<sup>22</sup> The confidence limits for the overall visitation estimate in 2022, including non-survey regions are ±3.08% adult visits; ±8.03% child visits; and ±4.24% total visits.

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

Confidence limits for overall visitation per survey wave in 2022 range between  $\pm 8.85\%$  (wave 1 – 8 December 2022 to 10 January 2022) and  $\pm 20.30\%$  (wave 4 – 1 March to 5 April 2022 - Table 19).

Table 19: Confidence Limits by Survey Wave<sup>23</sup>

No. NPWS Park Visits	Adult Visits Confidence Limit <sup>1</sup>	Child Visits Confidence Limit <sup>1</sup>	Total Visits Confidence Limit <sup>1</sup>
Wave 1	$\pm 7.69\%$	$\pm 12.44\%$	$\pm 8.85\%$
Wave 2	$\pm 7.45\%$	$\pm 17.96\%$	$\pm 10.50\%$
Wave 3	$\pm 13.34\%$	$\pm 15.65\%$	$\pm 13.68\%$
Wave 4	$\pm 16.71\%$	$\pm 28.30\%$	$\pm 20.30\%$
Wave 5	$\pm 8.52\%$	$\pm 16.71\%$	$\pm 10.45\%$
Wave 6	$\pm 9.15\%$	$\pm 20.35\%$	$\pm 11.31\%$
Wave 7	$\pm 10.18\%$	$\pm 31.18\%$	$\pm 14.58\%$
Wave 8	$\pm 7.52\%$	$\pm 14.45\%$	$\pm 9.32\%$
Wave 9	$\pm 11.43\%$	$\pm 16.90\%$	$\pm 12.23\%$
Wave 10	$\pm 9.29\%$	$\pm 37.11\%$	$\pm 14.82\%$
Wave 11	$\pm 7.70\%$	$\pm 13.53\%$	$\pm 9.27\%$
Wave 12	$\pm 9.72\%$	$\pm 15.52\%$	$\pm 10.69\%$
Wave 13	$\pm 7.52\%$	$\pm 19.29\%$	$\pm 10.72\%$
<b>Total 2020</b>	<b><math>\pm 2.97\%</math></b>	<b><math>\pm 7.84\%</math></b>	<b><math>\pm 4.11\%</math></b>

Source: NPWS Parks Visitor Surveys 2008 - 2022

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; 2022 n=1,382

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 and 2022 surveys also incorporate these changes.

<sup>23</sup> 95% confidence level for survey estimates only (excludes non-survey estimates).

## **2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

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 2% of visits in 2022 (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 2022, visits to parks increased from 2020 levels in all Branches, except the Hunter Central Coast Branch.

Visits to parks in the *Greater Sydney Branch* increased from 19.6m in 2018 to 20.3m in 2022 – the highest number of visits yet attained (Chart 8). This can primarily be attributed the highest level of visits attained for Ku-ring-gai Chase (4.4m) and Garigal National Parks (1.2m) and sustained high levels of visits to Royal (5.1m) and Lane Cove National Parks (2.6m). A decline in visitation was observed in 2022 for Sydney Harbour (1.9m) and Kamay-Botany (908k) and Georges River National Parks.

NPWS visits to parks in the *North Coast Branch* increased from 5.4m visits in 2022 to 6.2m visits in 2022, but did not achieve the peak attained in 2016 of 9.1m visits. The highest number of visits recorded was observed in 2022 for Cape Byron (1.0m), Yuraygir (656k), Arakoon (404k) and Dorrigo National Parks (378k) and Kattang Nature Reserve (468K), while Crowdy Bay National Park increased visits from 2020 levels (468k in 2022), but was nowhere near its peak of 1.3m visits in 2016.

Visits to *Hunter Central Coast Branch* parks decreased to their lowest levels since 2012 with only 5.1m visits recorded (down from 8.2m in 2020). Declines in visits from 2020 levels were observed for Bouddi (836k), Booti Booti (557k), Glenrock (471k) and Tomaree National Parks (320K), with only Brisbane Water (929k) and Myall Lakes National Parks (471k) recording increases in visits (though nowhere near their peaks of 1.5m in 2016 and 1.3m in 2018 respectively).

Visits to the *Blue Mountains Branch* increased from 7.2m visits in 2020 to 7.8m visits in 2022, but this was nowhere near the peak attained in 2018 of 9.6m visits. Visits to this Branch can be almost solely attributed to visits from Blue Mountains National Park which attained 6.4m visits in 2022. Kanangra-Boyd National Park had the next highest number of visits with 434k.

Visits to parks in the *South Coast Branch* increased from 3.9m visits in 2020 to 5.9m visits in 2022 almost reaching the peak of 6.4m visits observed in 2018. The increase in visitation was primarily due to increases visits to Eurobodalla (1.4m) and Murrumbidgee National Parks (815k) and the Illawarra Escarpment State Conservation Area (319k) – the highest visits recorded for these parks, Morton National Park also recorded a high number of visits in 2022 (815k), but nowhere near its peak of 1.0m visits in 2008.



## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

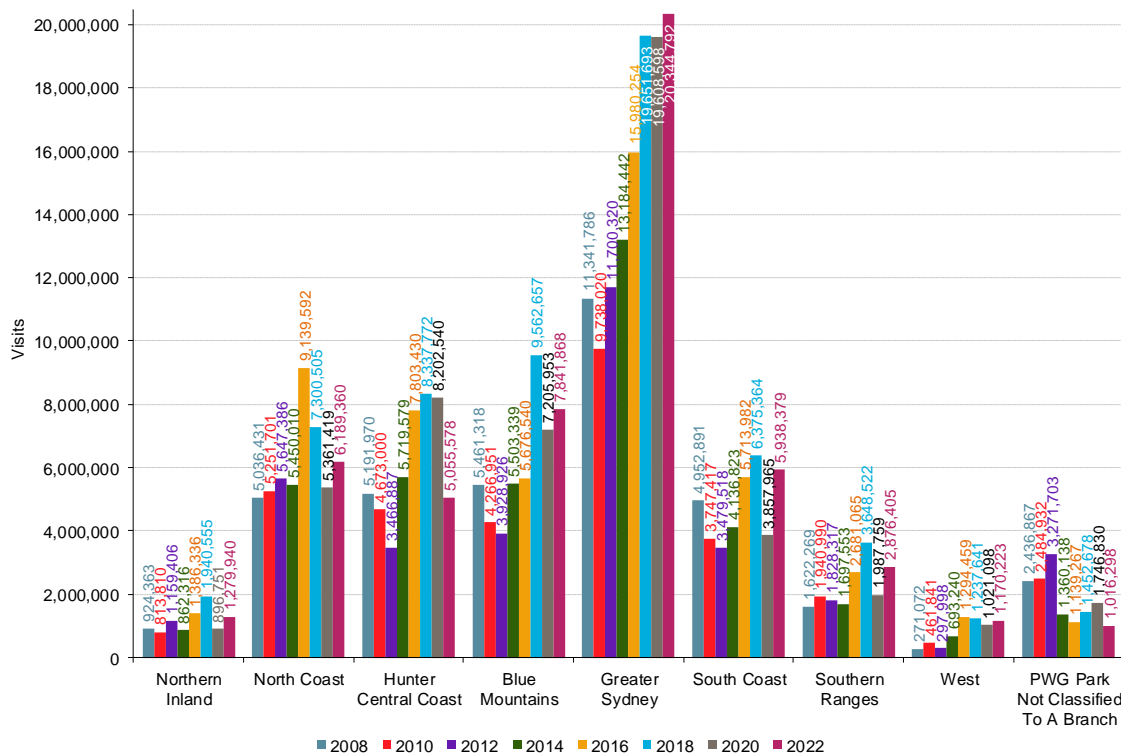
Visits to parks in 2022 for the *Southern Ranges Branch* was the second highest recorded at 2.9m visits, up from 2.0m in 2020, but a distance from the peak of 3.6m visits observed in 2018. decreased from 3.6m visits in 2018 to 2.0m visits in 2020. This result is primarily due to increase in visits to Kosciuszko National Park, from 1.5m visits in 2020 to 2.5m in 2020.

A slight increase in visits was observed for parks in the *Northern Inland Branch*, with visitation rising from 0.9m in 2020 to 1.3m in 2022, but not close to the peak recorded in 2018 of 1.9m visits. Visits are spread over a large number of parks for this Branch, with record visits observed for Oxley Wild Rivers National Park in 2022 (334k up from 91k in 2020). However, this increase was offset by a decrease in visits to Warrumbungle National Park from 467K visits in 2020 to 179k in 2020.

Visits to the *West Branch* increased from 1.0m in 2020 to 1.2m in 2022. However, visits to Murray Valley National Park, the most visited park in the Branch, declined from 663k visits in 2020 to 492k visits in 2022. Highest recorded visits were observed for Murrumbidgee Valley (161k) and Mungo National Parks (152K) in 2022/

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 - 2022

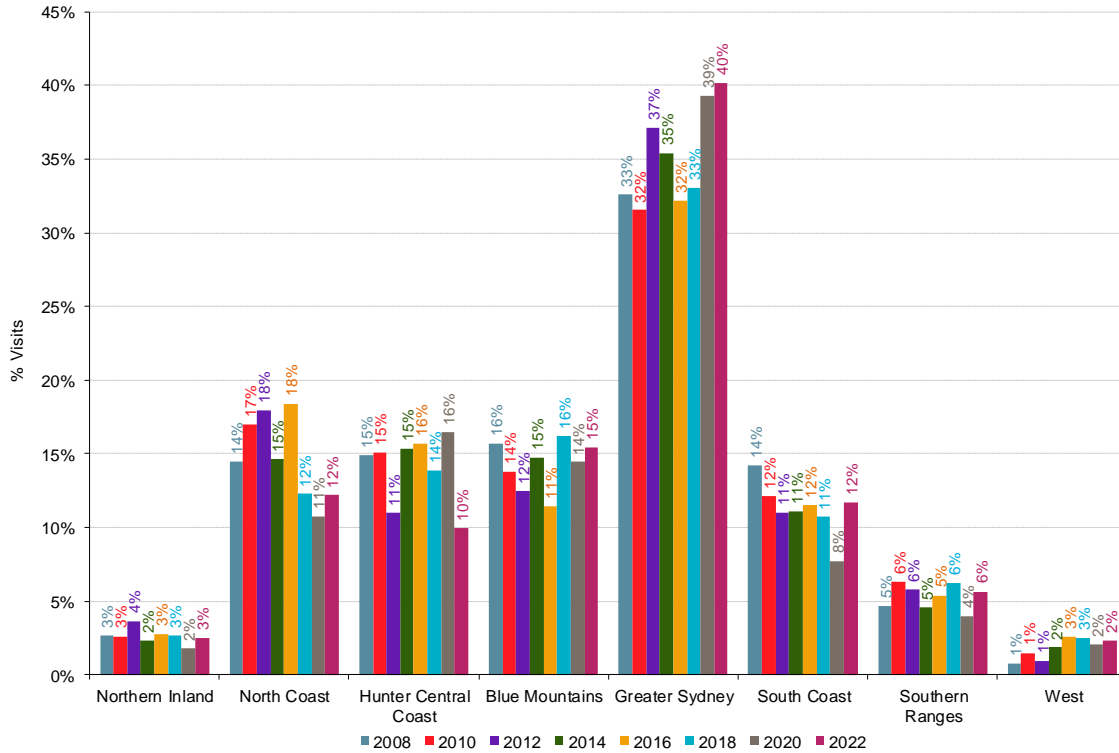
Base: 2008 n=1,563; 2010 n=1,468; 2012 n=1,457; 2014 n=1,667; 2016 n=1,728, 2018 n=1,739; 2020 n=1,178; 2022 n=1,382

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 39% in 2020 to 40% in 2022 – the highest proportional contribution obtained. A marked decrease in proportional contribution to park visits from 2020 to 2022 was also observed for the *Hunter Central Coast Branch*, down from 16% to 10% (its lowest proportion recorded).

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

The proportional contribution to total NPWS park visits for all other Branches increased from 2020 levels in 2022. The most notable increase was observed for the *South Coast Branch*, which rose from 8% in 2020 to 12% in 2022.

Chart 9: Proportional NPWS Annual Visitation by NPWS Branch



Source: NPWS Parks Visitor Surveys 2008 - 2022  
 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; 2022 n=1,382

The following commentary provides comparative analysis of visitation to NPWS Branches from 2008 to 2022 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 2022. Highest ever visits were recorded in waves 2 (January), wave 4 (March) and in wave 7 (June). Visits were generally above the 8-year average (i.e. 2008-2022), the exceptions being in waves 5-6 (April-May) and wave 8 (July). While 2022 visits were higher than in 2020 in waves 1-2 (December-January), wave 4 (March) and waves 6-7 (May-June), visits were lower than in 2020 from wave 8 onwards (July-December) – the second half of 2022.



## **2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

*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 generally observed in 2022. Visitation was the highest recorded in 2022 for wave 11 (September-October), but was the lowest recorded in wave 4 (March). Annual visits were the third highest recorded, but aside from high levels of visits in January and September-October, visitation by wave was slightly under the average.

*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). This trend was generally observed for visits in 2022. Visitation was the lowest recorded in wave 4 (March) and wave 13 (November-December). 2022 was the sixth lowest level of annual visitation recorded, with virtually all waves recording visits below the 8-year average.

*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-June and mid-July-mid August. For 2022 however, marked peaks in visitation were evident in wave 4 (March) and wave 7 (June). Overall annual visits were the second highest recorded and visits each wave were generally moderately higher than the average.

*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 2022 however, There was a marked peak in visitation in Summer (December 2021 to February 2022 – record visits for waves 2-3), below average visitation from waves 4-7 (March-June) and around the average levels of visitation for the rest of the year. The second highest level of annual visits was clearly due to the high summer visitation to parks in this Branch.

*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 2022, visitation was high for waves 1-2 (December-January), wave 5 (April) and then in waves 8-9 (July-August). Visits to this Branch were the second highest recorded mainly due to these peaks in visitation, with remaining waves recording visits around the average.

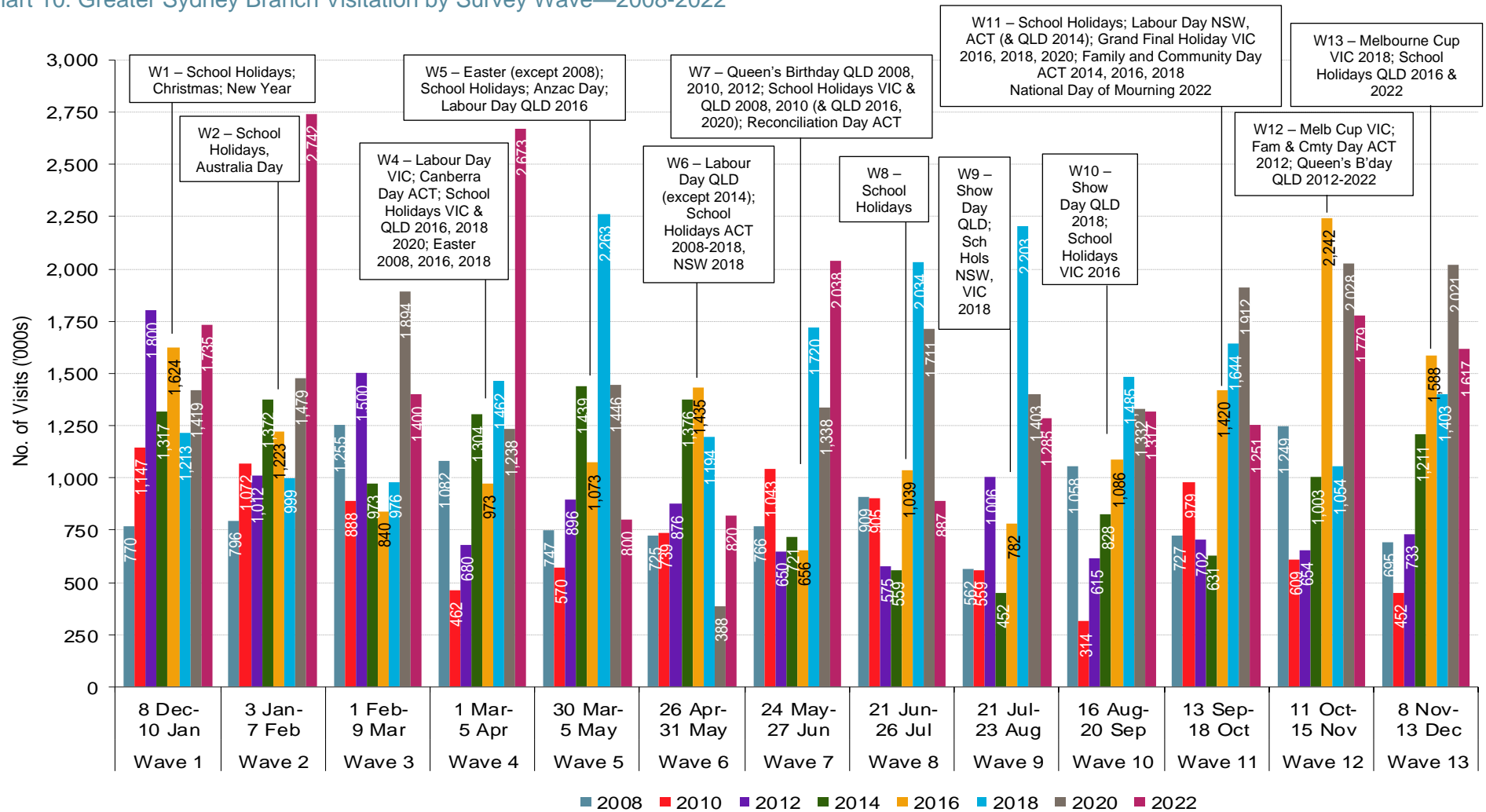
*Northern Inland Branch* – On average, only 6 respondents claim to visit parks in the Northern Inland Branch each wave, so visitation estimates per wave are subject to large error and should be treated with caution. That stated, visitation tends to peak in the Northern Inland Branch in wave 1 (December), wave 5 (April) and wave 11 (mid-September-mid October) in line with school holidays. In 2022 peaks in visitation were observed in waves 1 and 2 (December 2021-January 2022 – highest levels recorded) and in wave 9 (mid-July-mid-August – also the highest recorded).. The highest level of visitation was recorded for wave 8 (June) 2020. The lowest level of visits recorded were observed in waves 5-6 of 2022 (April-May). Aside from the peaks stated above, visitation by wave was below average in 2022 for this Branch.

## **2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

*Western Branch* – On average, only 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. In general, there is a peak in visits to parks in the West Branch in December-January (waves 1-2) and in wave 11 (mid-September-mid-October in the school holidays). Visits are low for remaining waves. However, for 2022 the highest levels of visitations occurred in wave 4 (March), waves 7-8 (June-July), wave 10 (mid-August-mid-September) and waves 12 (mid-October-mid-November). Each of these waves recorded the highest level of visits in 2022.

2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

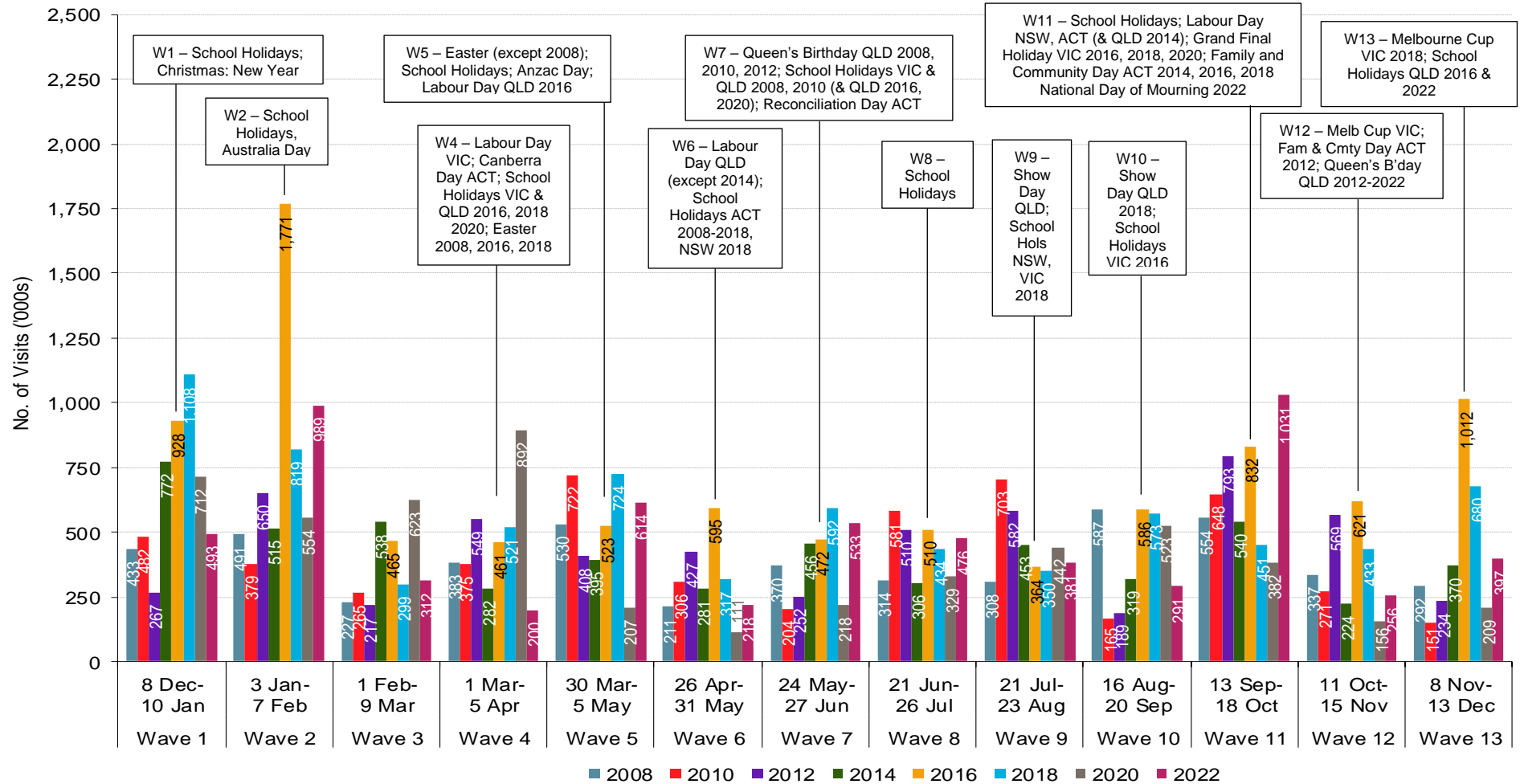
Chart 10: Greater Sydney Branch Visitation by Survey Wave—2008-2022



Source: NPWS Parks Visitor Surveys 2008 - 2022  
 Base: 2008 n=513; 2010 n=470; 2012 n=519; 2014 n=567; 2016 n=618, 2018 n=647; 2020 n=463; 2022 536

2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

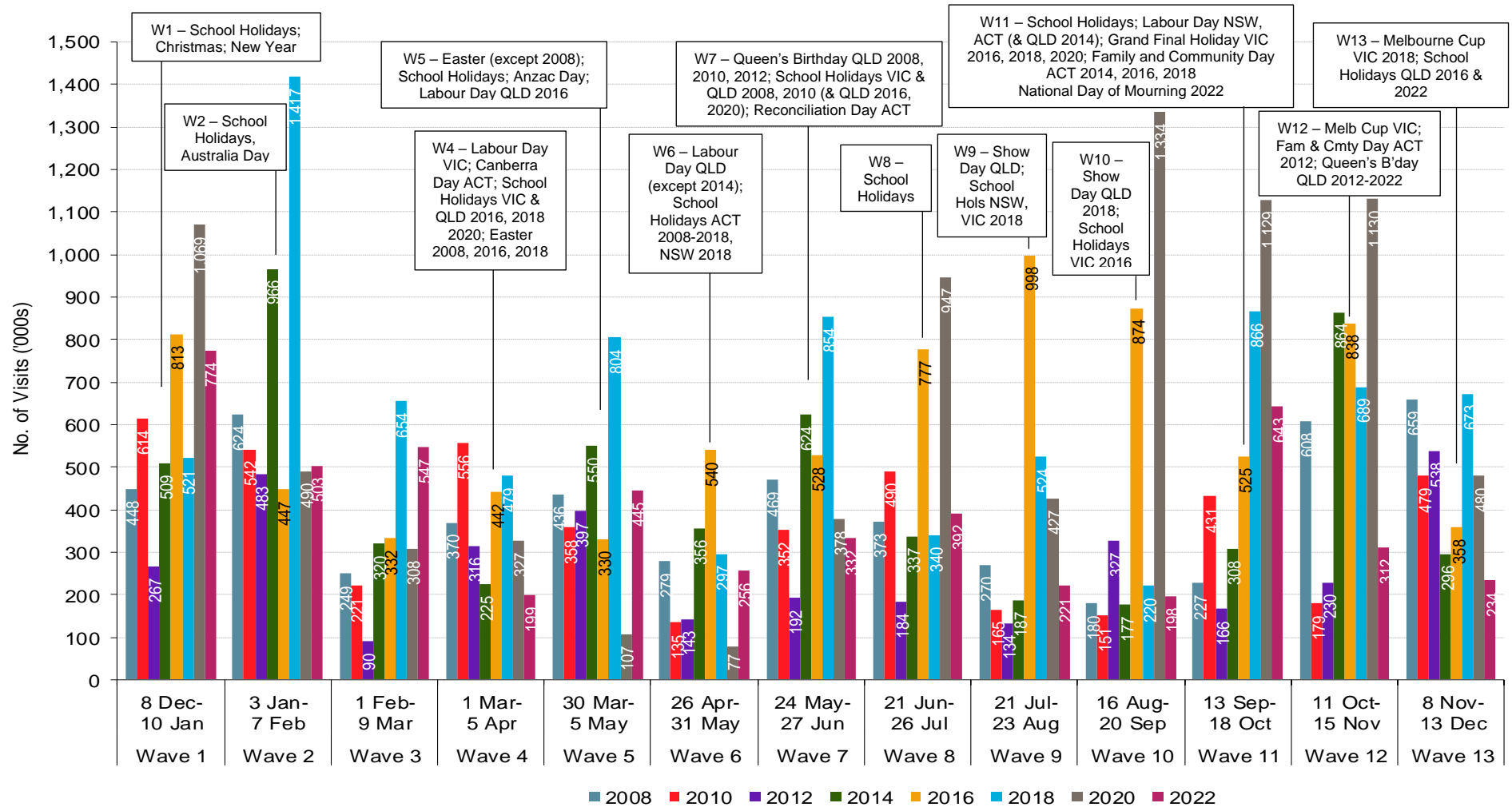
Chart 11: North Coast Branch Visitation by Survey Wave—2008-2022



Source: NPWS Parks Visitor Surveys 2008 - 2022  
 Base: 2008 n=297; 2010 n=280; 2012 n=257; 2014 n=309; 2016 n=332; 2018 n=301; 2020 n=197; 2022 n=222

2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

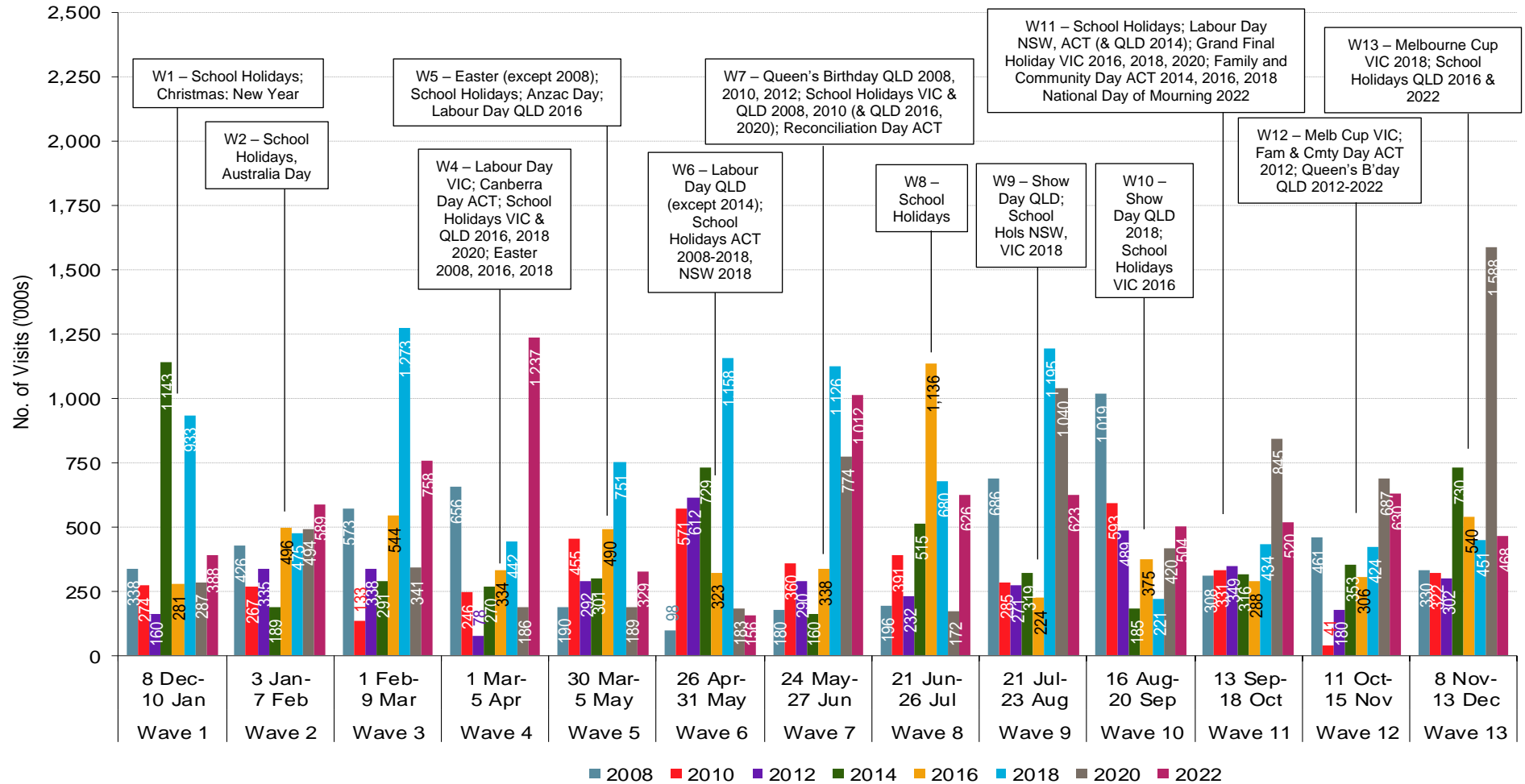
Chart 12: Hunter Central Coast Branch Visitation by Survey Wave—2008-2022



Source: NPWS Parks Visitor Surveys 2008 - 2022  
 Base: 2008 n=211; 2010 n=204; 2012 n=177; 2014 n=242; 2016 n=223, 2018 n=265; 2020 n=175; 2022 n=175

2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

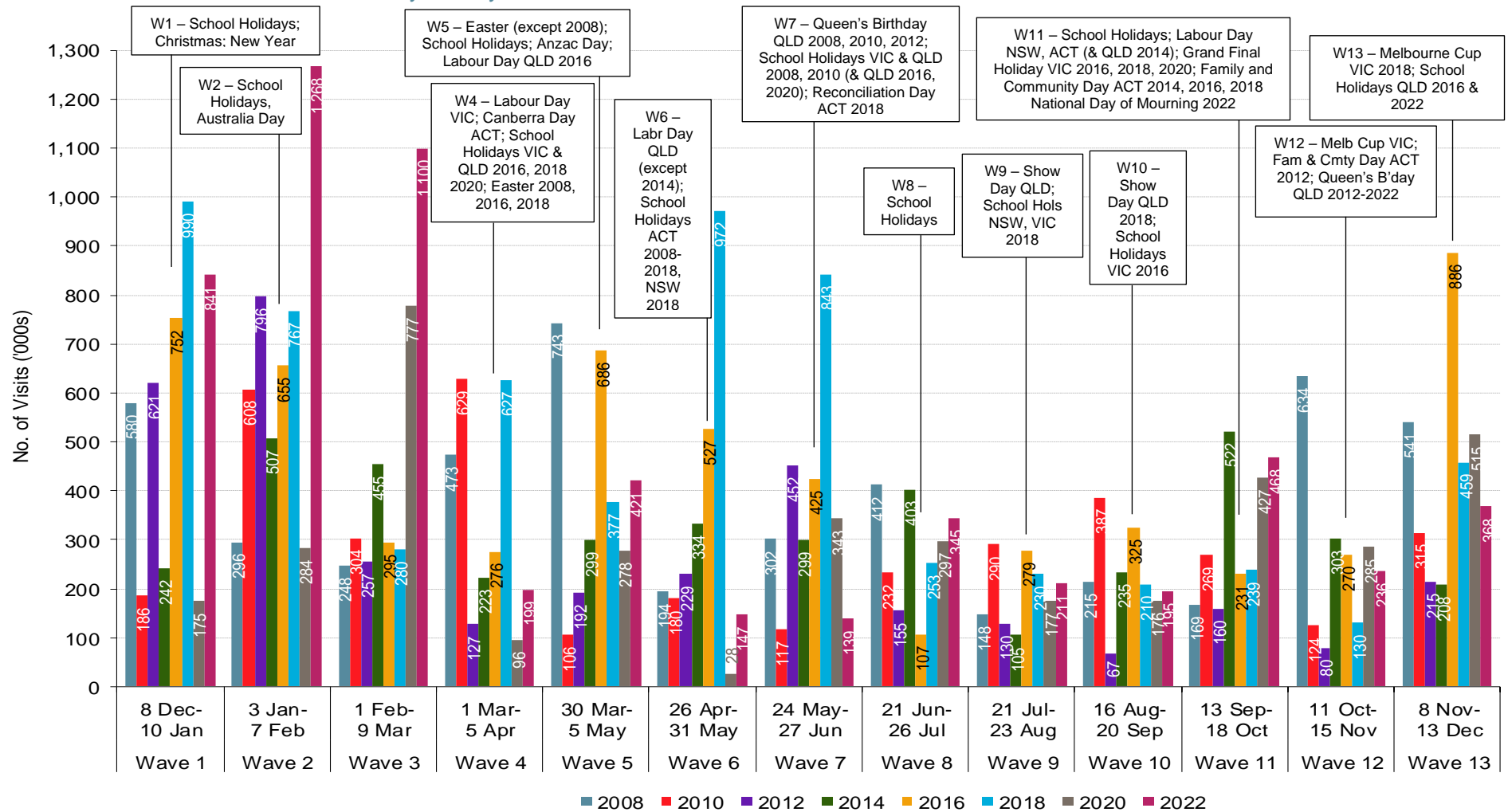
Chart 13: Blue Mountains Branch Visitation by Survey Wave—2008-2022



Source: NPWS Parks Visitor Surveys 2008 - 2022  
 Base: 2008 n=201; 2010 n=187; 2012 n=185; 2014 n=228; 2016 n=223; 2018 n=219; 2020 n=167; 2022 n=203

2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

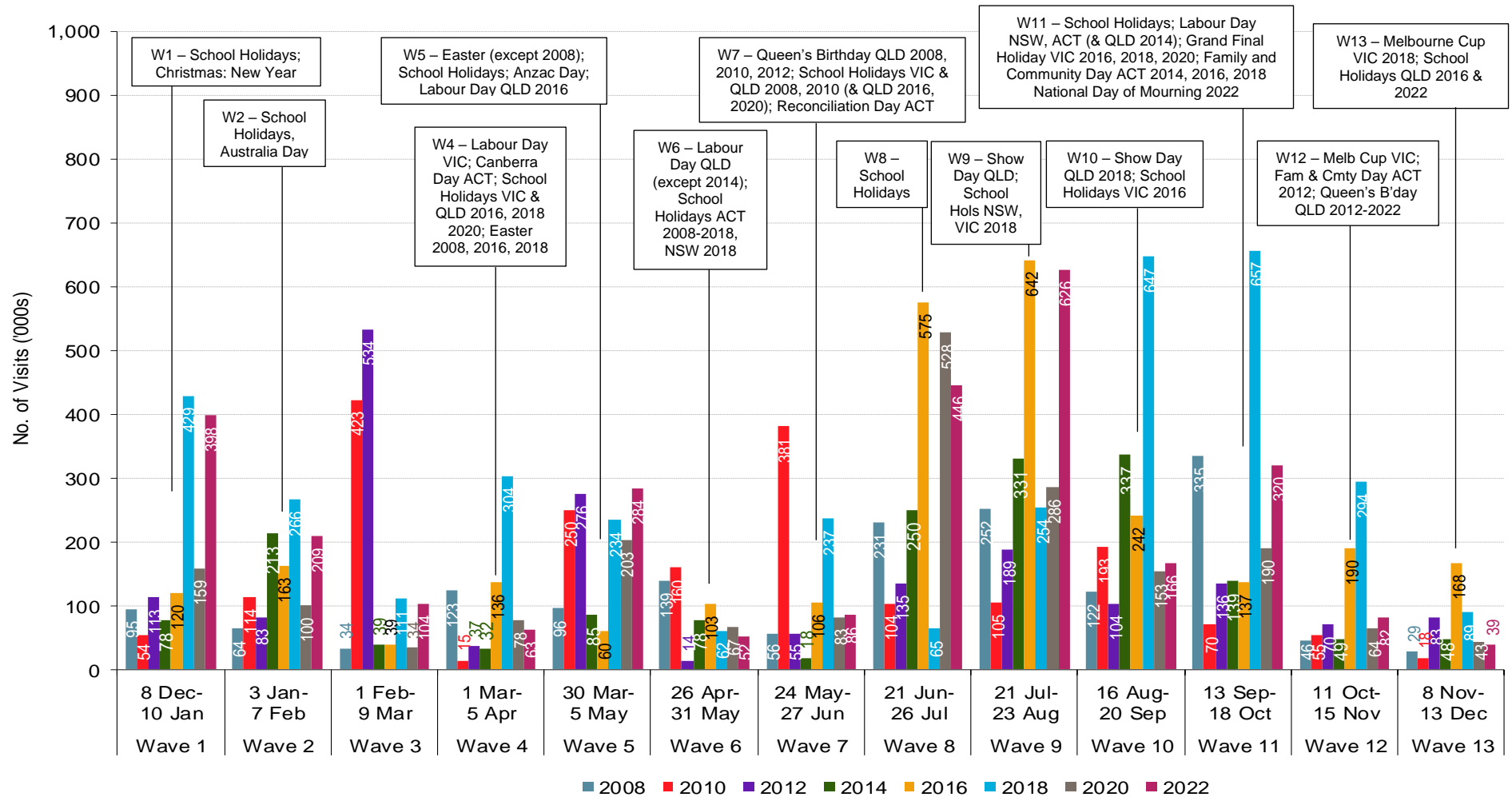
Chart 14: South Coast Branch Visitation by Survey Wave—2008-2022



Source: NPWS Parks Visitor Surveys 2008 - 2022  
 Base: 2008 n=305; 2010 n=250; 2012 n=256; 2014 n=322; 2016 n=279; 2018 n=269; 2020 n=192; 2022n=230

2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

Chart 15: Southern Ranges Branch Visitation by Survey Wave—2008-2022

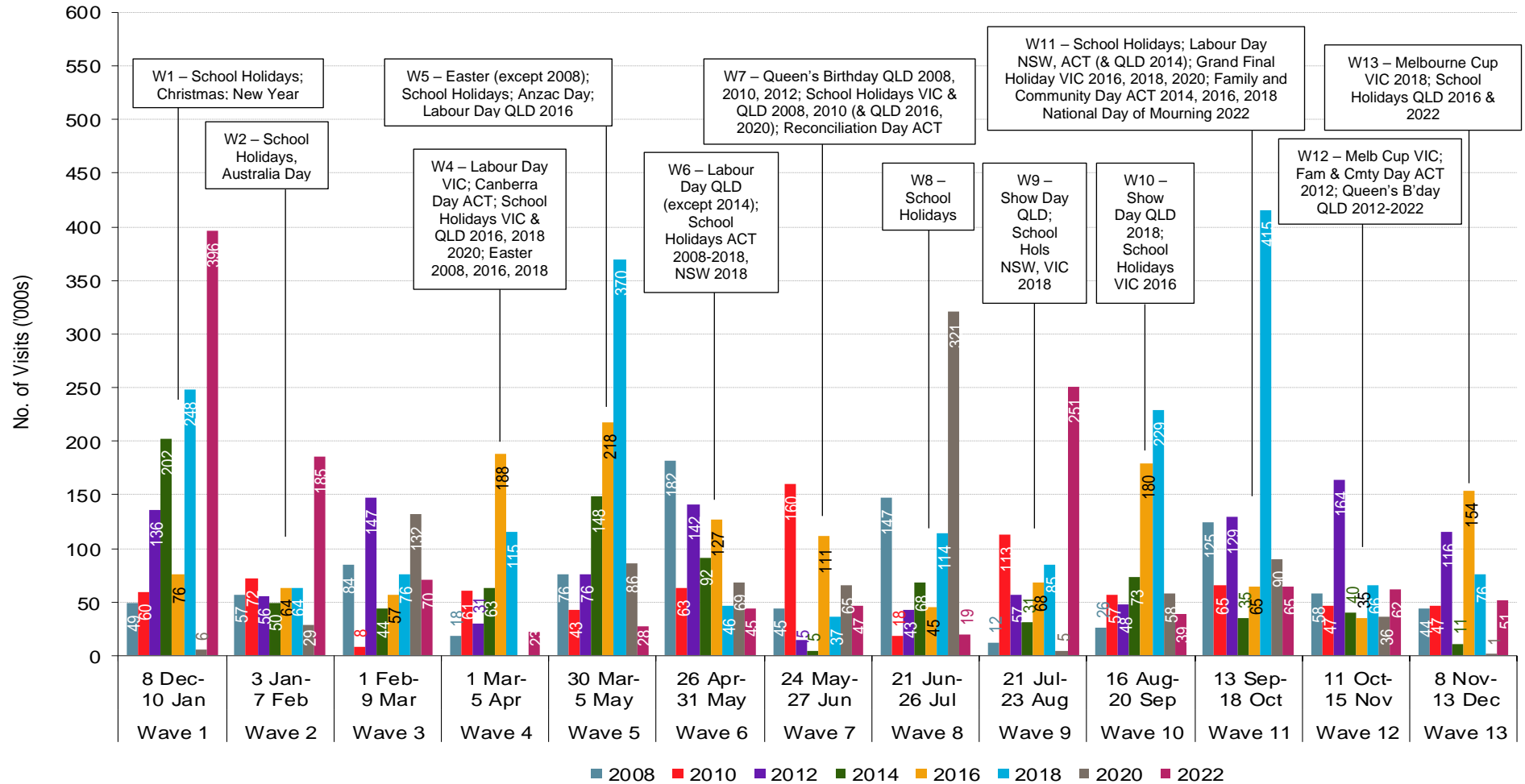


Source: NPWS Parks Visitor Surveys 2008 - 2022  
 Base: 2008 n=145; 2010 n=145; 2012 n=143; 2014 n=167; 2016 n=185; 2018 n=169; 2020 n=100; 2022 n=153



2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

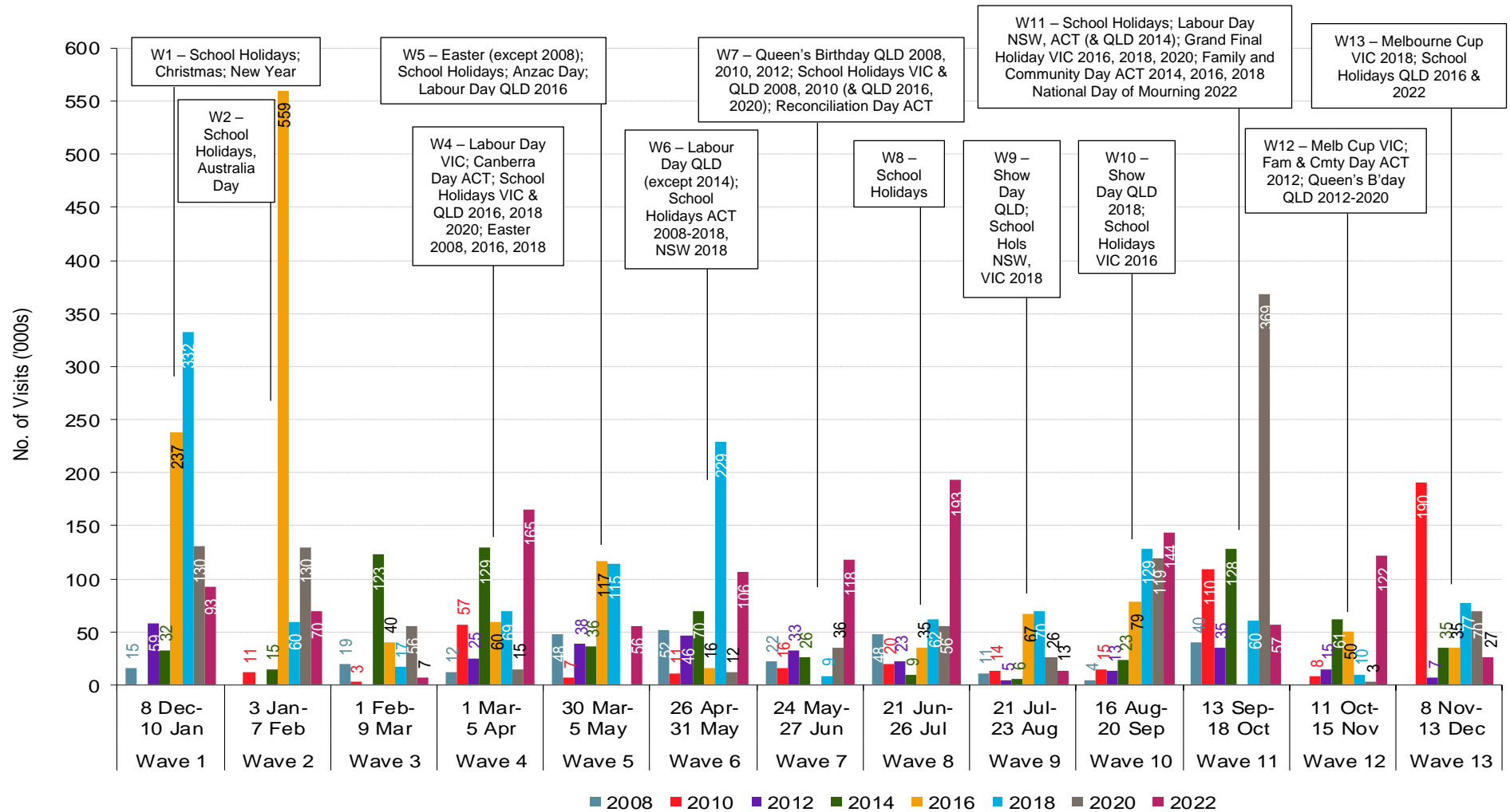
Chart 16: Northern Inland Branch Visitation by Survey Wave—2008-2022



Source: NPWS Parks Visitor Surveys 2008 - 2022  
 Base: 2008 n=77; 2010 n=65; 2012 n=82; 2014 n=79; 2016 n=87, 2018 n=93; 2020 n=43; 2022 n=71- Caution, small sample size for 2020

2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

Chart 17: West Branch Visitation by Survey Wave—2008-2022



Source: NPWS Parks Visitor Surveys 2008 - 2022  
 Base: 2008 n=23; 2010 n=25; 2012 n=31; 2014 n=41; 2016 n=44, 2018 n=51; 2020 n=42; 2022 n=64 – Caution, small sample sizes

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

### 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 Charts 18 to 21 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* (6.4m visits) has maintained the top position in 2022 from *Royal National Park* (5.1m visits – Chart 18). From 2008 to 2010, visitation to *Blue Mountains National Park* was in decline (from 3.6m visits to 3.1m), but it then successively broke visitation records in 2014, 2016 and 2018. Visits obviously declined in 2020 due to bushfires and COVID-19 restricting access to the park, but there has only been a modest increase in visitation in 2022 from 2020 levels (6.2m), rather than the large rebound in visits expected.

Visits to *Royal National Park* have decreased from 5.3m visits in 2020 to 5.1m visits in 2022. This is surprising given that restrictions to visit parks have been lifted since mid-2020, so one would have expected 2022 visits to move closer to 2018 peak levels (6.1m 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 COVID-19 restrictions. In 2022, record visits were attained, with 4.4m visits to the park.

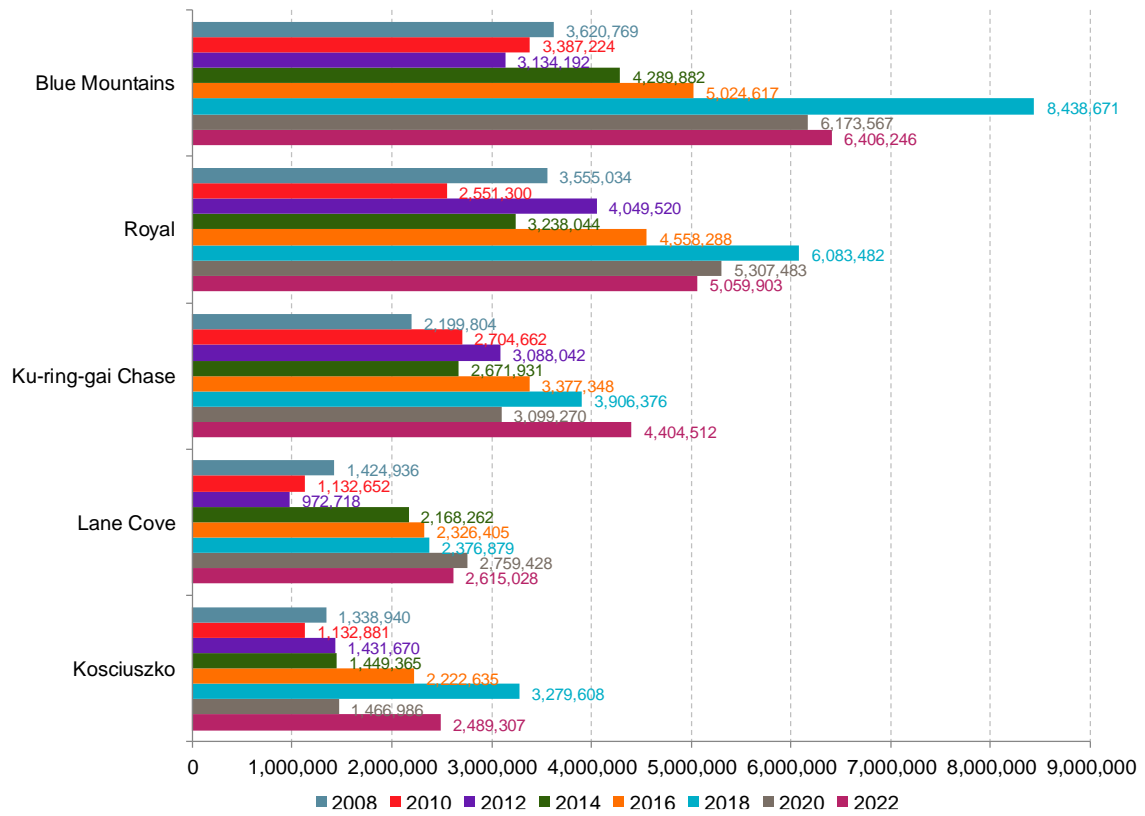
From 2008 to 2012 visitation to *Lane Cove National Park* had been on the decline. However, from 2014 visitation increased to its peak of 2.8m visits in 2018. Visitation declined to under 1.5m visits in 2020, but increased to its second highest level in 2022 at 2.6m visits.

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. In 2022 visits increased to 2.5m and moved the park into 5<sup>th</sup> place on the most visited NPWS parks.

As a consequence, *Sydney Harbour National Park* dropped to sixth placed with 1.9m visits in 2022 (see Chart 19). From 2008 to 2012 visits averaged 1.2m per year, while from 2014 to 2022 the average was 2.2m visits). However, visits in 2022 were the lowest of the 5-survey year span, with visits from 2016 to 2002 recording a minimum of 2.2m visits.

The above six 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 six parks each year is statistically robust (ranging from n=50 up to n=250), while the number of respondents visiting the remaining parks in the top ten 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.

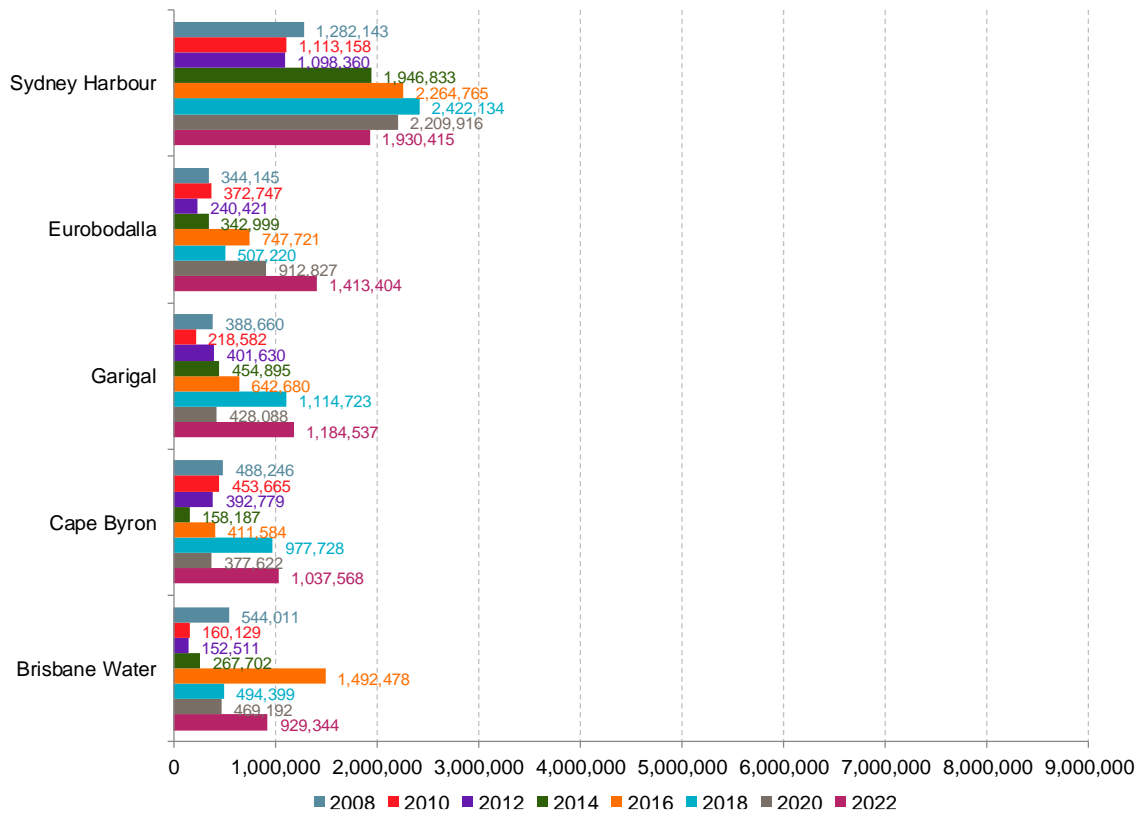
Chart 18: Annual Visitation for Selected Parks—Parks 1-5



Source: NPWS Parks Visitor Surveys 2008 - 2022  
 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; 2022 n=1,382

Of the parks ranked seven to ten in 2022, three of the four *Eurobodalla* (1.4m), *Garigal* (1.2m) and *Cape Byron National Parks* (1.0m) recorded their highest number of visits in 2022. *Brisbane Water National Park*, ranked tenth attained its second highest level of visits in 2022 (929k).

Chart 19: Annual Visitation for Selected Parks—Parks 6-10



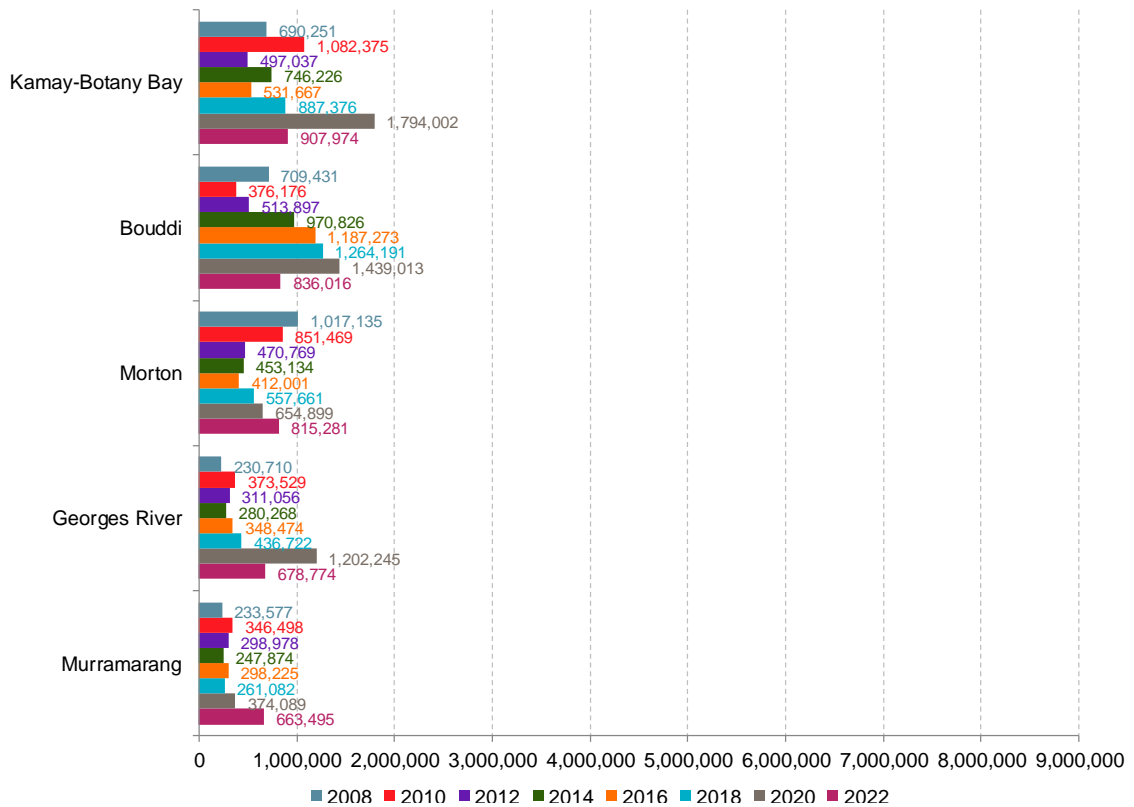
Caution: Small sample sizes for Eurobodalla, Garigal, Cape Byron and Brisbane Water (n<30)

Source: NPWS Parks Visitor Surveys 2008 - 2022

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; 2022 n=1,382

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 20 visits to *Kamay-Botany Bay National Park* fell from the peak in 2020 of 1.8m to 908k in 2022. This also occurred for *Bouddi* (1.4m – 2020; 836k – 2022) and *Georges River National Parks* (1.2m – 2022; 679k – 2022). Increases in visits from 2020 were observed in 2022 for *Morton* (655k – 2020; 815k – 2022) and *Murramarang National Parks* (374k – 2020; 663k – 2022).

Chart 20: Annual Visitation for Selected Parks—Parks 11-15

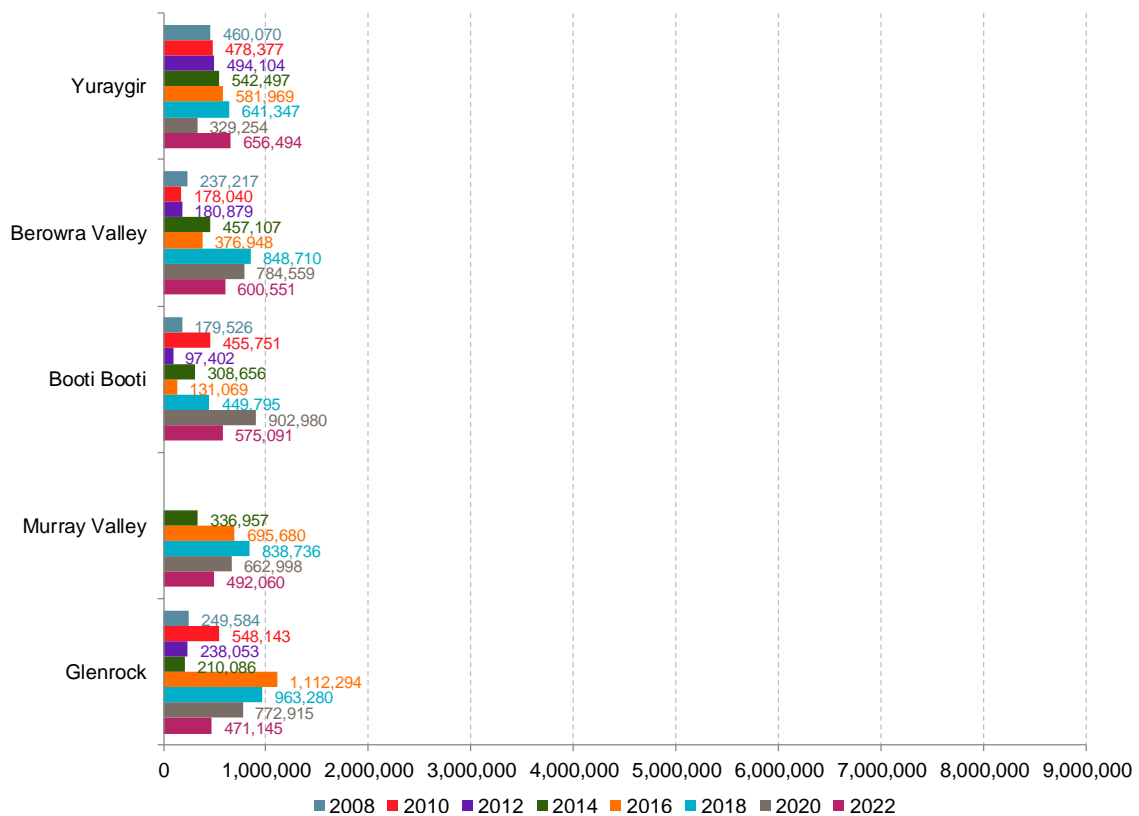


Caution: Small sample sizes for Kamay- Bay, Bouddi and Georges River (n<30)  
 Source: NPWS Parks Visitor Surveys 2008 - 2022  
 Base: 2008 n=1,563; 2010 n=1,468; 2012 n=1,457; 2014 n=1,667; 2016 n=1,728, 2018 n=1,739; 2020 n= 1,178; 2022 n=1,382

Chart 21 show visits for parks ranked 16-20 in 2022. Aside from the decline in visits observed in 2020 (most likely due to bushfires and COVID-19 restrictions), *Yuraygir* National Park has steadily increased visits over time, from 460K in 2008 to 656k in 2022,

Visits for *Berowra Valley* and *Murray Valley* National parks peaked in 2018 (849k and 839k respectively), but have steadily declined since then, recording 601k and 492k visits in 2022 respectively. Declines in visits since the 2016 peak (1.1m visits) have occurred each for *Glenrock* National Park, with visits in 2022 now at 471k. Visits to *Booti Booti* National Park are subject to large variation each year due to small sample sizes. 2002 visits were registered at 575k.

Chart 20: Annual Visitation for Selected Parks—Parks 16-20



Caution: Small sample sizes for all parks (n<30)  
 Source: NPWS Parks Visitor Surveys 2008 - 2022  
 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; 2022 n=1,382

Estimates for the most visited parks in each NPWS Management Branch for 2022 have been provided in Charts 22 to 29 following. *Please note that visitation estimates calculated for the majority of these parks are based on very small sample sizes and therefore subject to significant error. Visitation estimates should therefore only be seen as indicative.*

Greater Sydney Branch had eight parks in the top 20 for visits, while Hunter Central Coast Branch had four parks in the top 20. South Coast Branch had three parks in the top twenty, North Coast had two and Blue Mountains, Southern Ranges and West Branches each had one. *Oxley Wild Rivers National Park* was the most visited park in the Northern Inland Branch in 2022 and was ranked the 29<sup>th</sup> most visited park.

*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.*

*Cape Byron* (1.0m visits) and *Yuraygir National Parks* (656k visits) were the only 2 parks in the North Coast Branch to register over 500,000 visits in 2022 (see Chart 22). The top six parks contributed 55% of all visits to North Coast Branch in 2022

## **2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

The top three parks in the Hunter Central Coast Branch had over 500,000 visits – *Brisbane Water* (929k), *Bouddi* (836k) and *Booti Booti* (575k). 71% of all visits to parks in the Hunter Central Coast Branch came from visits to the top six parks (see Chart 23).

*Blue Mountains* National Park dominates visits to the Blue Mountains Branch. With 6.4m visits in 2022 it contributes 82% of the entire Branch's 7.8m visits (see Chart 24).

The top six most visited parks in the Greater Sydney Branch contributed 79.1% of all visits to the Branch in 2022. *Royal* National Park, with 5.1m visits contributed almost a quarter of all Branch visits (24.9% - see Chart 25). *Ku-ring-gai Chase* National Park attained the most visits recorded in 2022 (4.4m visits), as did *Garigal* National Park (1.2m visits). *Kamay-Botany Bay* National Park recorded the largest decline in visits from 2020 levels (1.8m – 2020; 908k – 2022).

*Eurobodalla*, *Morton* and *Murramarang* National Parks (1.4m, 815k and 663k visits respectively) recorded their highest number of visits in 2022, as did *Illawarra Escarpment* State Conservation Area (319k – see Chart 26). The top six most visits parks in the South Coast Branch contributed 64% of all visits to the Branch in 2022.

*Kosciuszko* National Park is the dominant park in the Southern Ranges Branch, contributing 87% of visits (2.5m) to the Branch's 2.9m visits (see Chart 27).

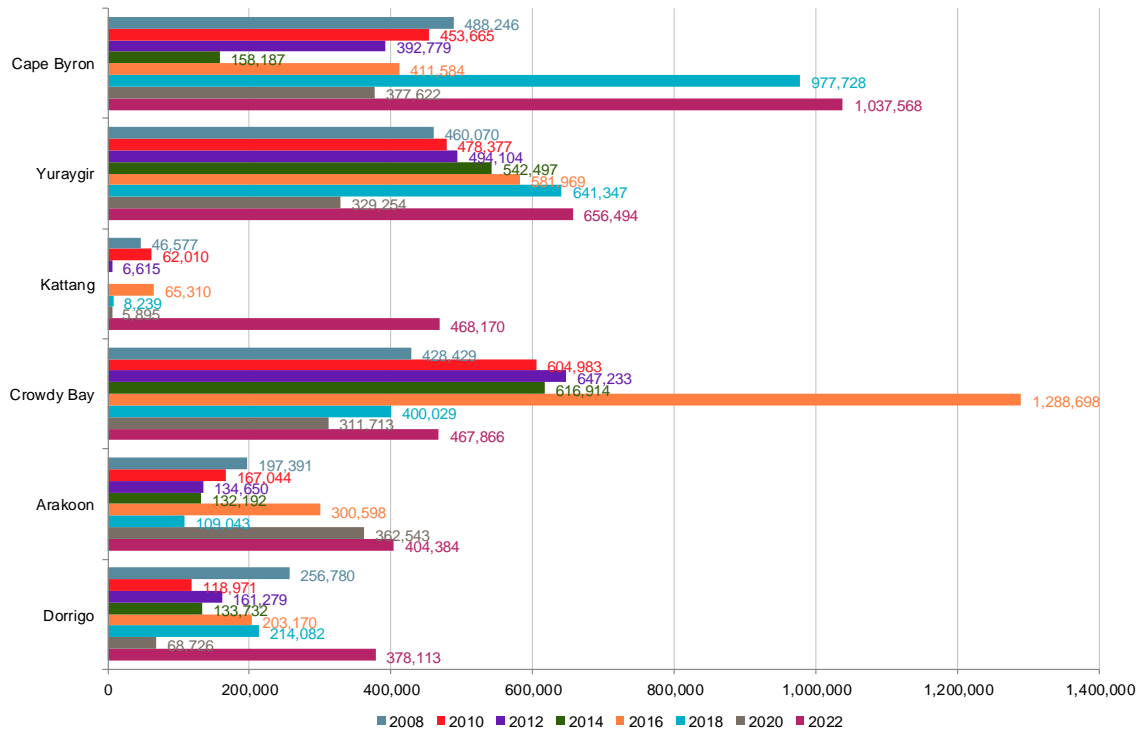
The Northern Inland Branch was one of only two Branches where no park attained 500,000 or more visitors in 2022 (see Chart 28). The highest number of visits recorded in 2022 was 334k by *Oxley Wild Rivers* National Park – a record number of visits for this park. The only other park that achieves regularly high numbers of visits in this park is *Warrumbungle* National Park, recording 179k visits in 2022, down from 467k in 2020.

*Murray Valley* National Park did not record at least 500,000 visits in 2022 (492k), recording well over this level in past survey years except for 2014 (337k – 2014; 696k – 2016; 839k – 2018; and 663k – 2020). In past years this park has contributed around 50% of all visits to the West Branch, but in 2022 its contribution was only 42% (see Chart 29).



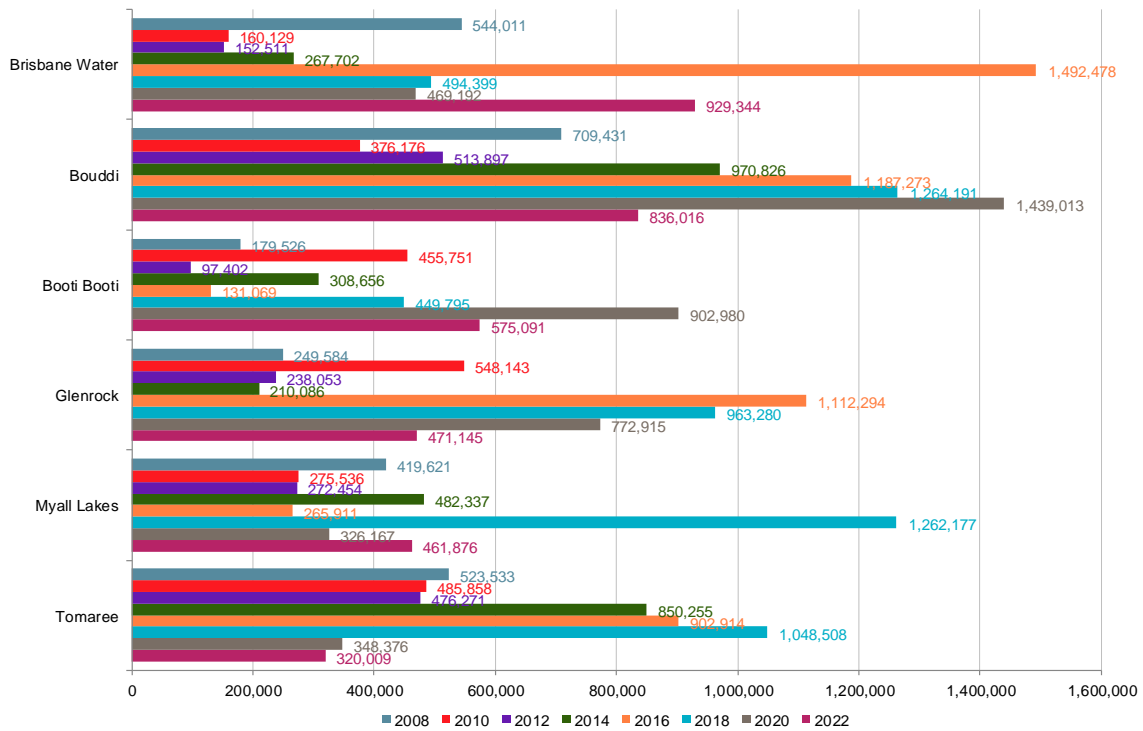
2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

Chart 22: Visitation for the top parks in the North Coast Branch



Source: NPWS Parks Visitor Surveys 2008-2022  
 Base: 2008 n= 297; 2010 n= 280; 2012 n= 257; 2014 n= 309; 2016 n=332; 2018 n= 301; 2020 n=197; 2022 n=222

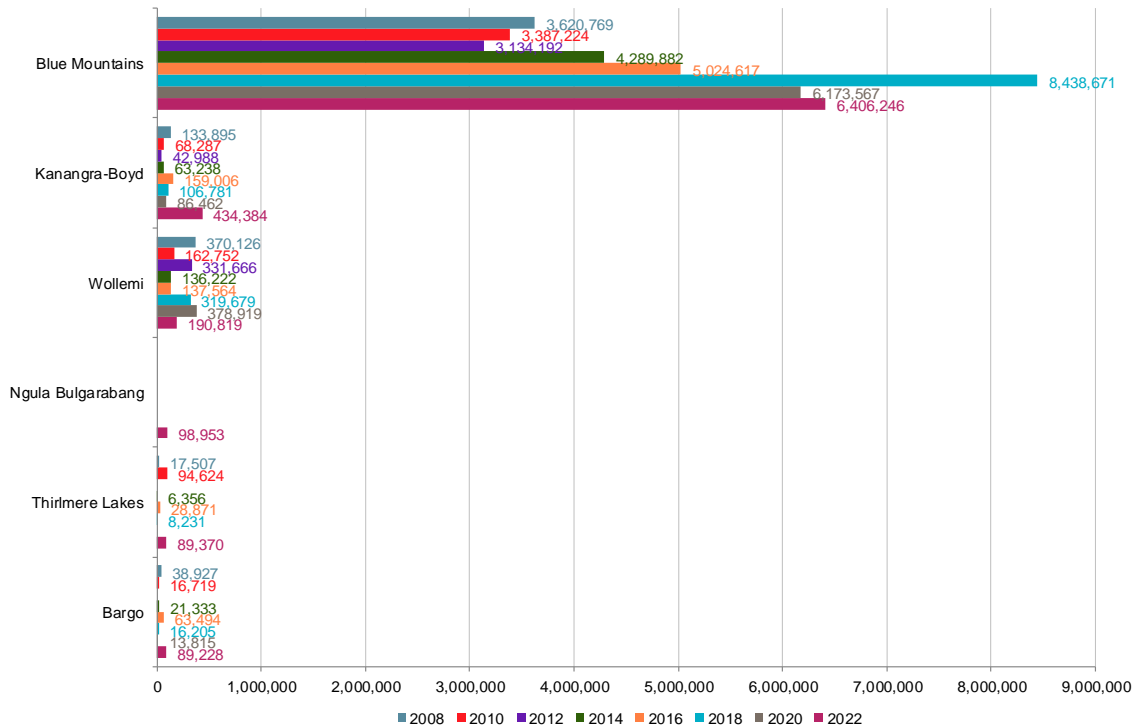
Chart 23: Visitation for the top parks in the Hunter and Central Coast Branch



Source: NPWS Parks Visitor Surveys 2008- 2022  
 Base: 2008 n= 2011; 2010 n= 204; 2012 n= 177; 2014 n=242; 2016 n=223; 2018 n= 265; 2020 n=175; 2022 n=175

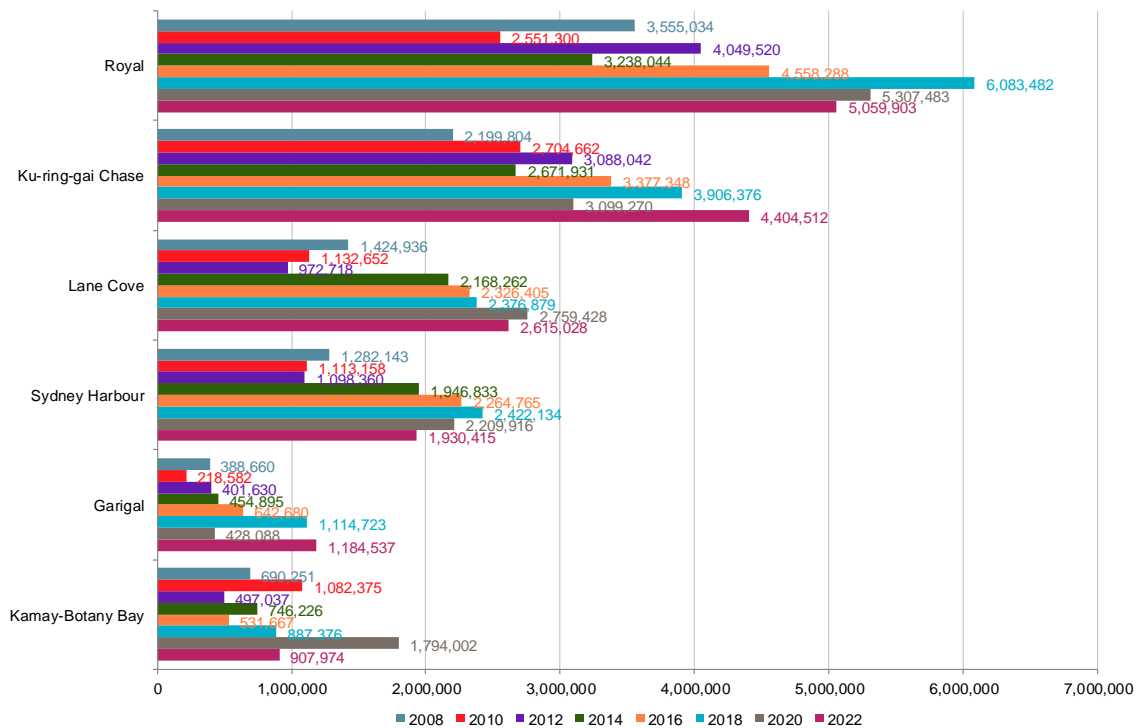
2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

Chart 24: Visitation for the top parks in the Blue Mountains Branch



Source: NPWS Parks Visitor Surveys 2018-2022  
 Base: 2008 n= 201; 2010 n= 187; 2012 n= 185; 2014 n= 228; 2016 n= 223; 2018 n= 219; 2020 n=167; 2022 n=203

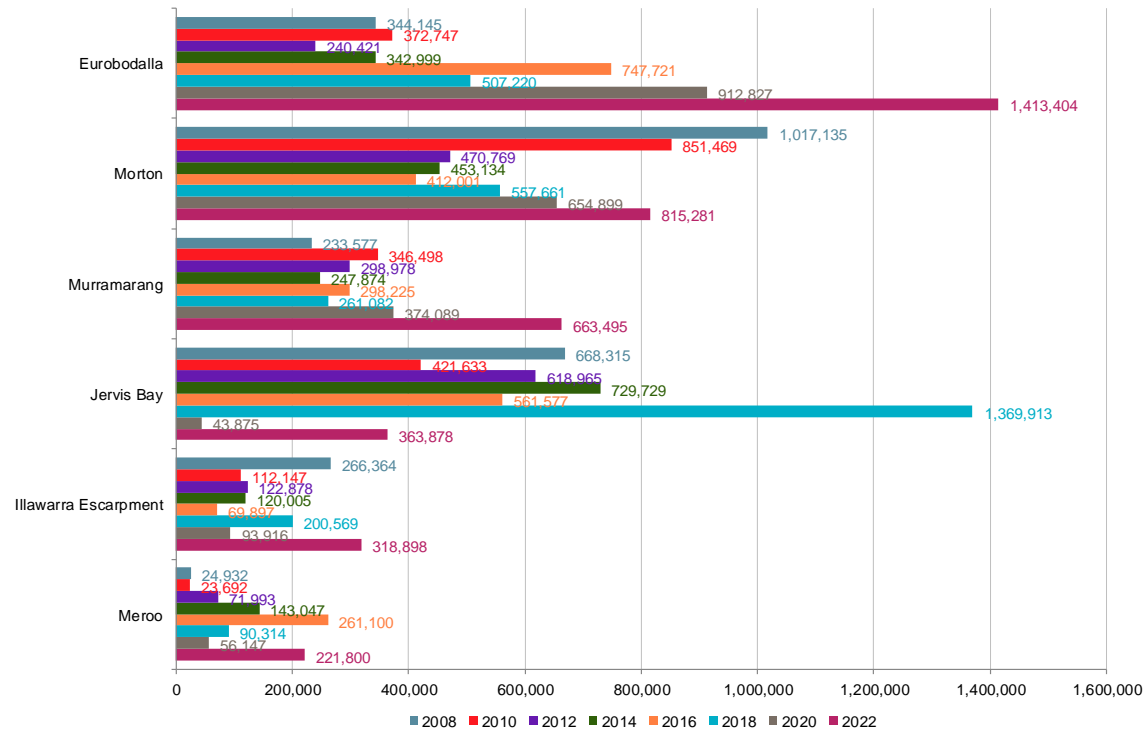
Chart 25: Visitation for the top parks in the Greater Sydney Branch



Source: NPWS Parks Visitor Surveys 2018-2022  
 Base: 2008 n= 513; 2010 n=470; 2012 n= 519; 2014 n=567; 2016 n= 618; 2018 n=647; 2020 n=463; 2022 n=536

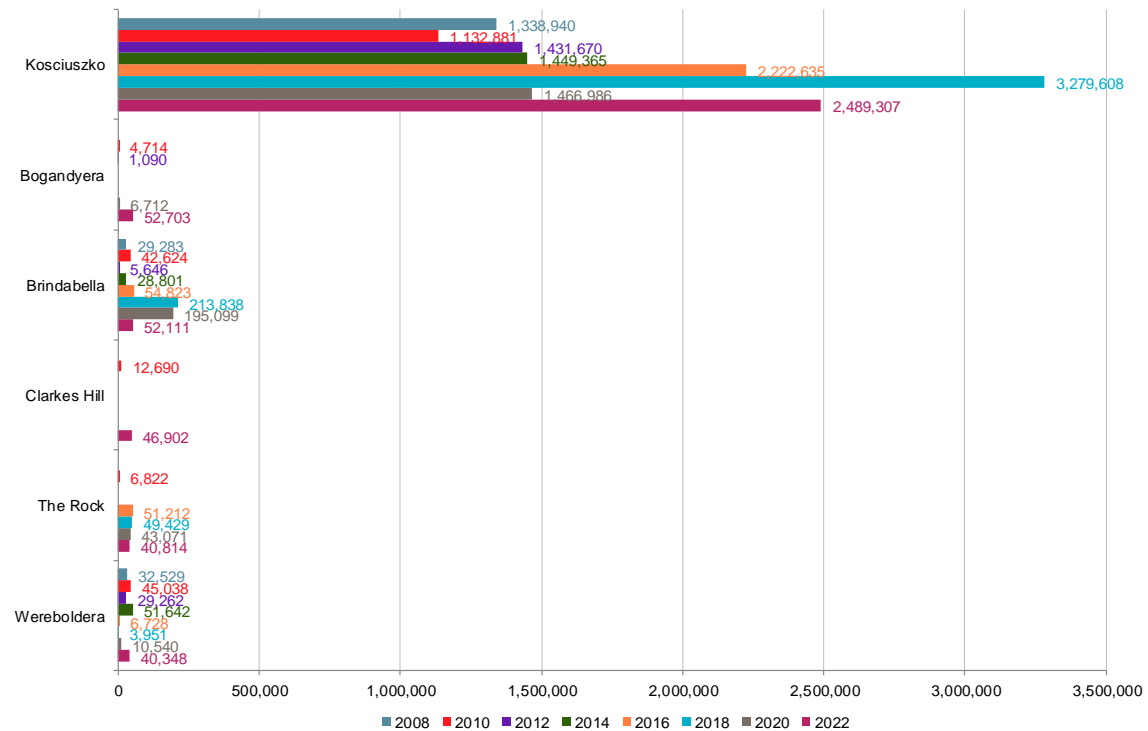
2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

Chart 26: Visitation for the top parks in the South Coast Branch



Source: NPWS Parks Visitor Surveys 2018-2022  
 Base: 2008 n= 305; 2010 n=250; 2012 n= 256; 2014 n=322 2016 n= 279; 2018 n=269; 2020 n=192; 2022 n=230

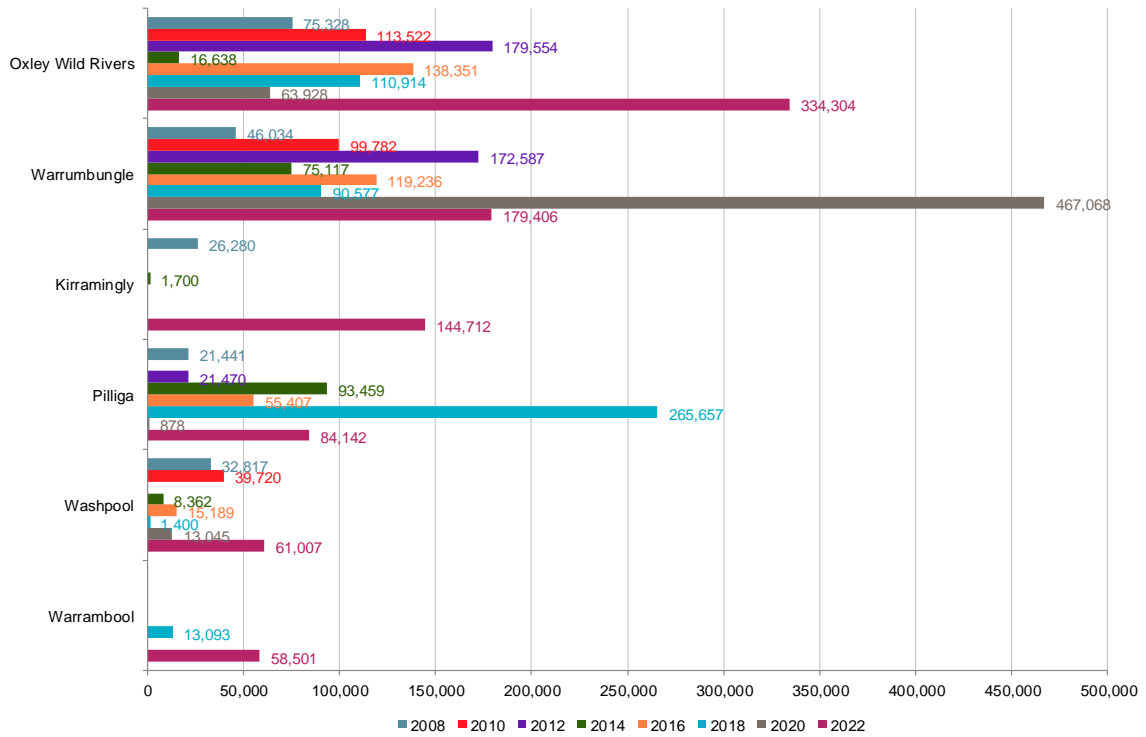
Chart 27: Visitation for the top parks in the Southern Ranges Branch



Source: NPWS Parks Visitor Surveys 2018-2022  
 Base: 2008 n= 145; 2010 n=145 2012 n= 143; 2014 n=167 2016 n= 185; 2018 n=169; 2020 n=100; 2022 n=153

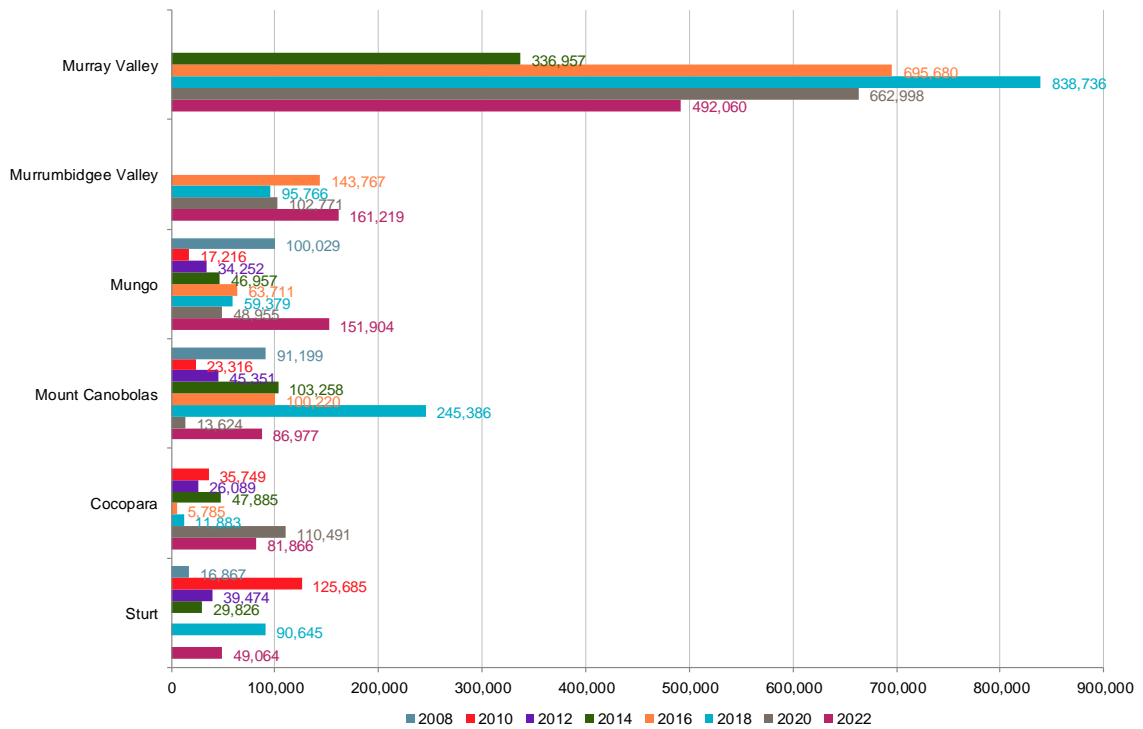
2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

Chart 28: Visitation for the top parks in the Northern Inland Branch



Source: NPWS Parks Visitor Surveys 2018-2022  
 Base: 2008 n= 77; 2010 n=65 2012 n= 82; 2014 n=79 2016 n= 87; 2018 n=93; 2020 n=43; 2022 n=71— Caution, small sample size for 2020

Chart 29: Visitation for the top parks in the West Branch



Source: NPWS Parks Visitor Surveys 2018-2022  
 Base: 2008 n= 23; 2010 n=25 2012 n= 31; 2014 n=42 2016 n= 44 2018 n=51; 2020 n=42; 2022 n=64 – 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.

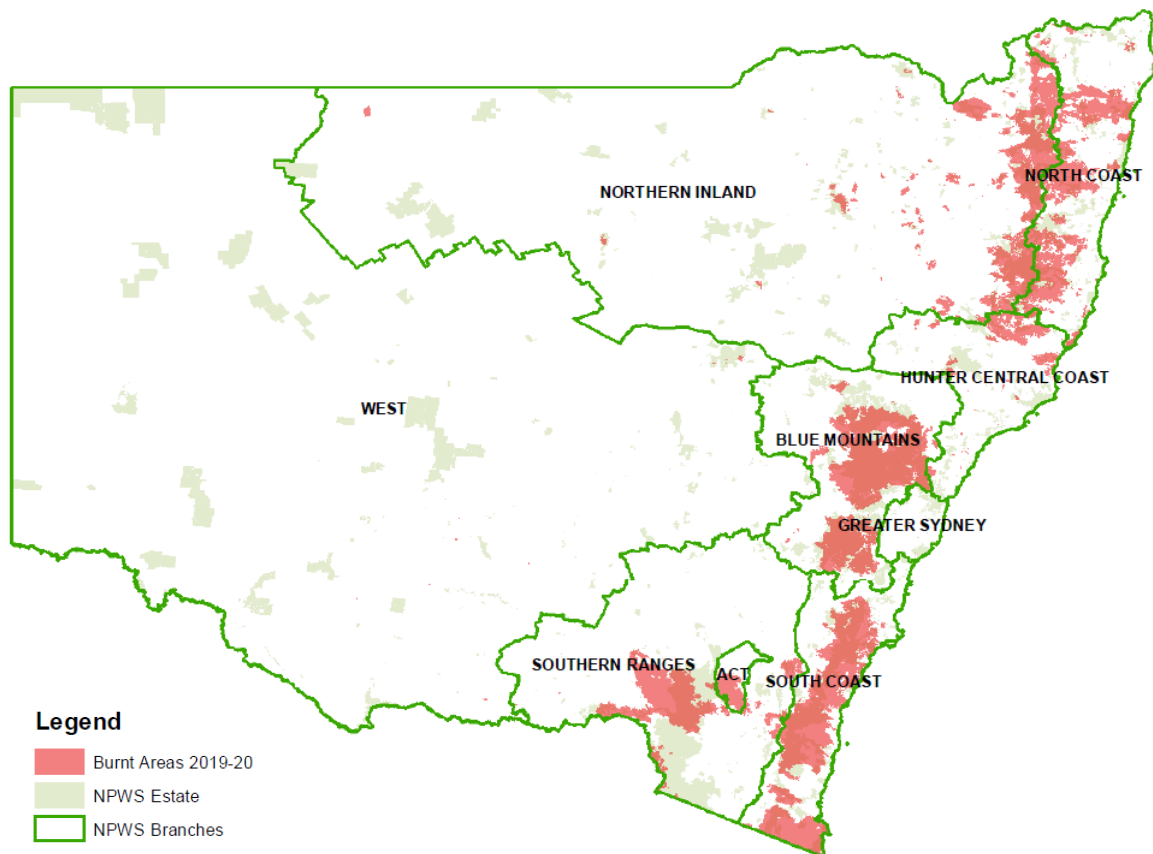
### 7.1.1 Impact of Bushfires and the COVID-19 Pandemic

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.

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.

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.

Map 1: 2019-20 Bushfires in each NPWS Branch



Source: Department of Planning, Industry and Environment

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:

- 23 Mar – Non-essential businesses were shut down. Schools remained open for children of essential workers, but parents were encouraged to keep their children at home.
- 25 Mar – Closure of outdoor play areas, caravan parks, camping grounds and community facilities were enacted.
- 30 Mar – Persons were 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.
- 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 – Outdoor play equipment, outdoor gymnasium equipment and skate parks were re-opened; but there was 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

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.

## **2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

The NSW-Queensland border also had restricted access from 24 March to 1 December 2020, with the NSW-Victorian border closed from 8 July to 23 November. 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)

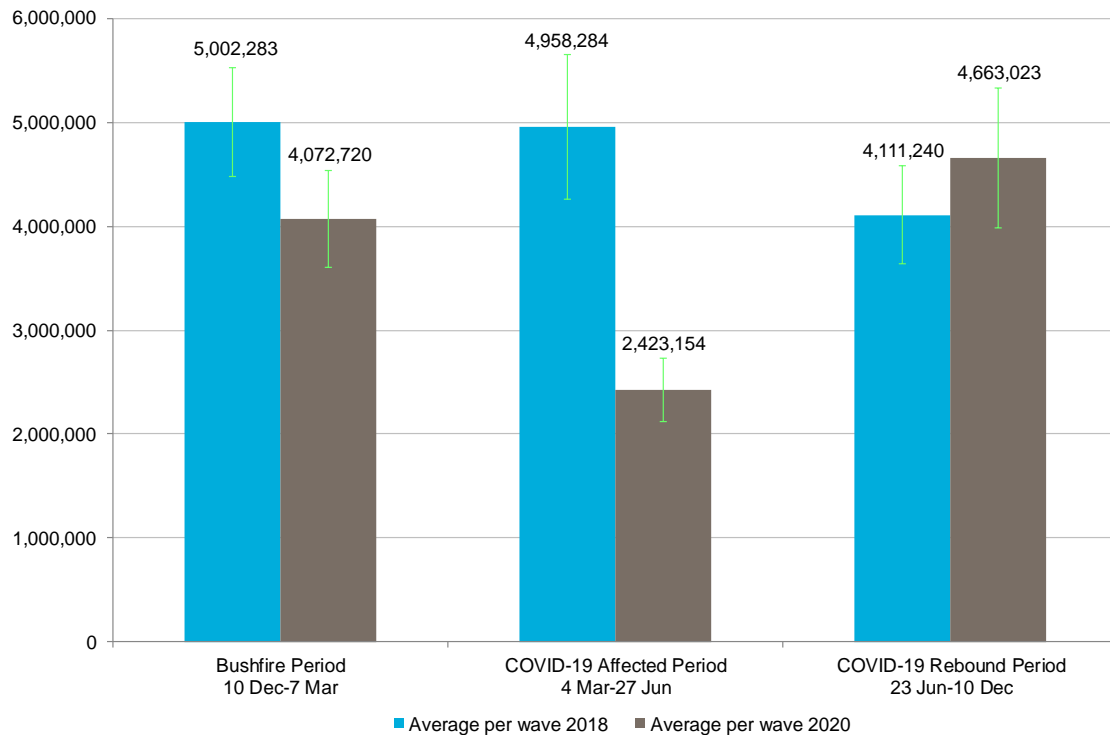
**COVID-19 Rebound Period** – 23 Jun-10 Dec (waves 8-13)

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 the analysis periods vary in length, analysis of visits has been made on the *average visits per wave* for each period. Comparison was 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 30 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 regarding a strong rebound in visitation after the strongest COVID-19 restrictions were lifted.

Chart 30: 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 31) 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.

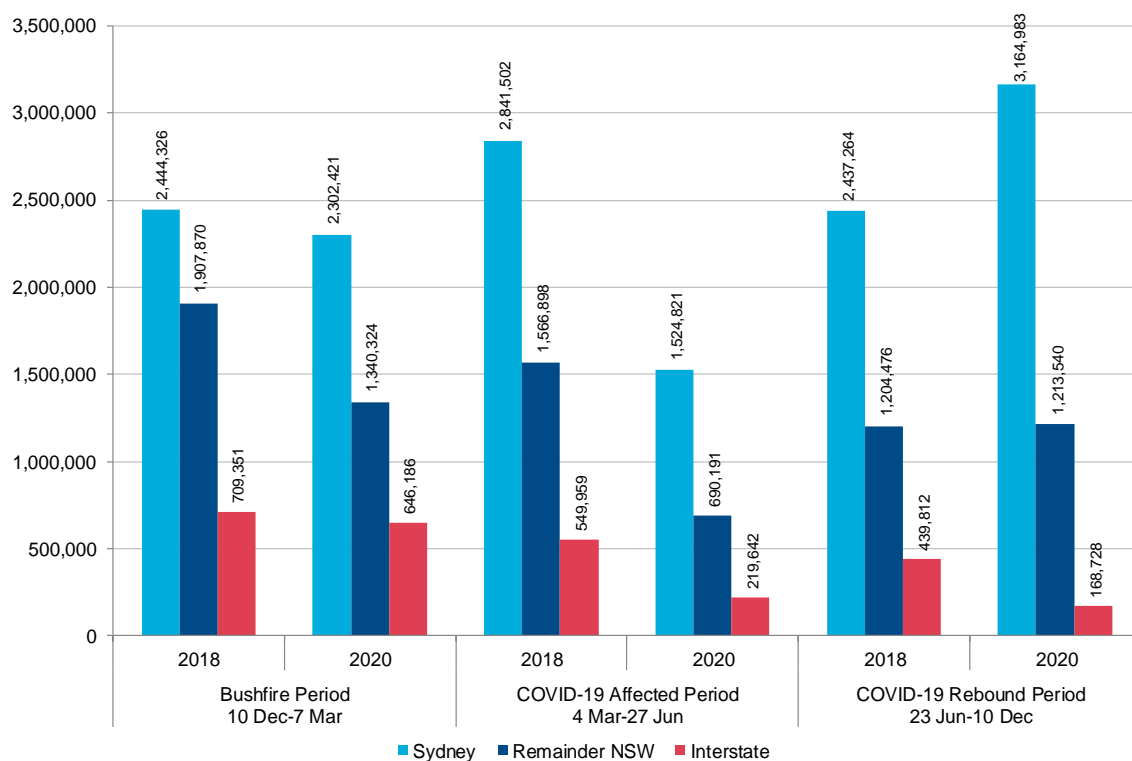
Not surprisingly, marked falls in visits per wave were observed amongst Sydney, Remainder NSW and Interstate residents from 2018 to 2020 during the COVID-19 Affected period (Sydney – 2.84m to 1.53m; Remainder NSW 1.57m to 0.69m; Interstate 0.55m to 0.22m). Limitations on travel, closed state borders and lockdowns due to COVID-19 restrictions significantly impacted individual/group capacity to access NPWS parks.



## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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.

Chart 31: 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 more detail on the impact of the 2020 bushfires and COVID-19 restrictions by NPWS Branch, please refer to the 2020 report.

## 7.2 Visitation to New South Wales

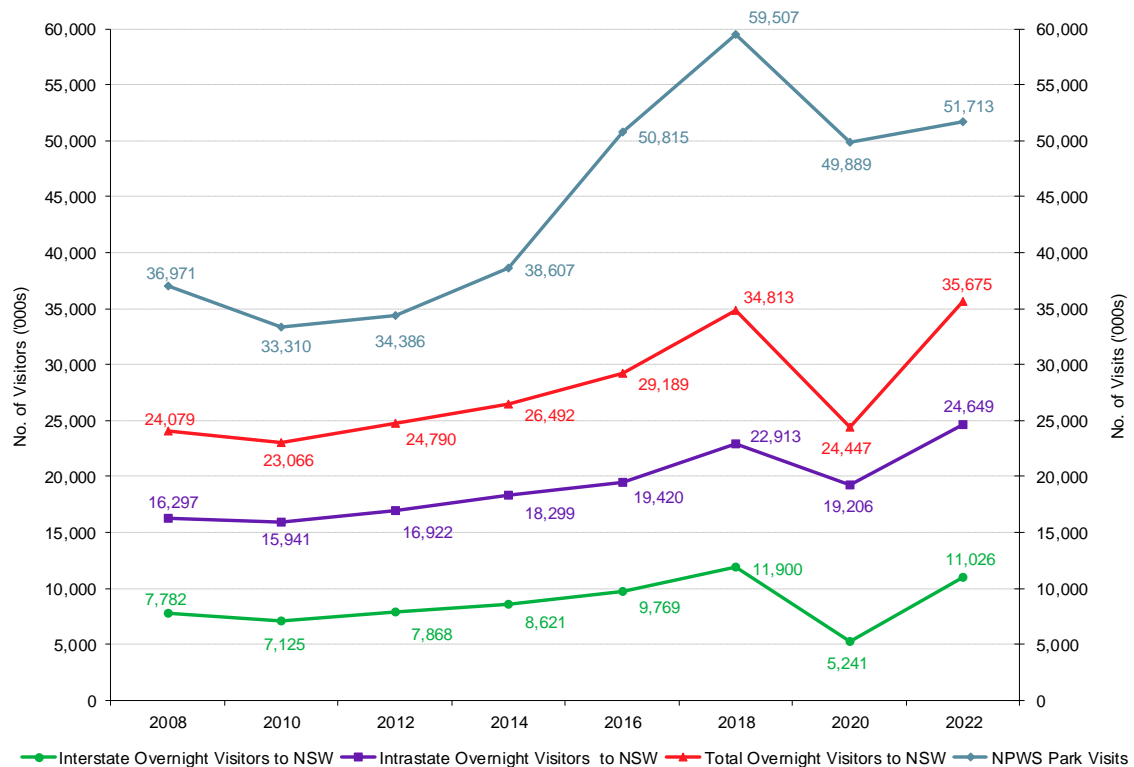
Chart 32 shows annual survey visitation data for survey years 2008 to 2022 (adjusted as detailed at the beginning of Section 7) and compares it with the number of visitors taking overnight trips to destinations in New South Wales<sup>24</sup>. Overnight visitors have been divided into interstate visitors and intrastate visitors. Results show that the number of overnight visitors did fall from 2008 to 2010, but

<sup>24</sup> National Visitor Survey – Tourism Research Australia.

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

rebounded in 2012 (exceeding 2008 levels) and increased again in 2014, 2016 and 2018. Overnight visitors then fell significantly in 2020 (most likely due to COVID-19 restrictions impacting negatively on visitation) but increased to its highest level in 2022. This result was consistent across both interstate and intrastate visitors, although the decline in interstate visitation was more marked in 2020 and the increase in 2022 in interstate visitors was slightly lower than the 2018 result. 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 markedly in 2020. It then increased in 2022, but nowhere near the record levels observed in 2020 for overnight visitors and only slightly higher than NPWS visits recorded in 2016. So NPWS visits reflect the general trend in over overnight visitors to NSW, but they do not reflect the magnitude of the change in visits per year (i.e. increases in NPWS visits after a year of declining visitation do not show the same magnitude of increase as do overnight visitors to NSW).

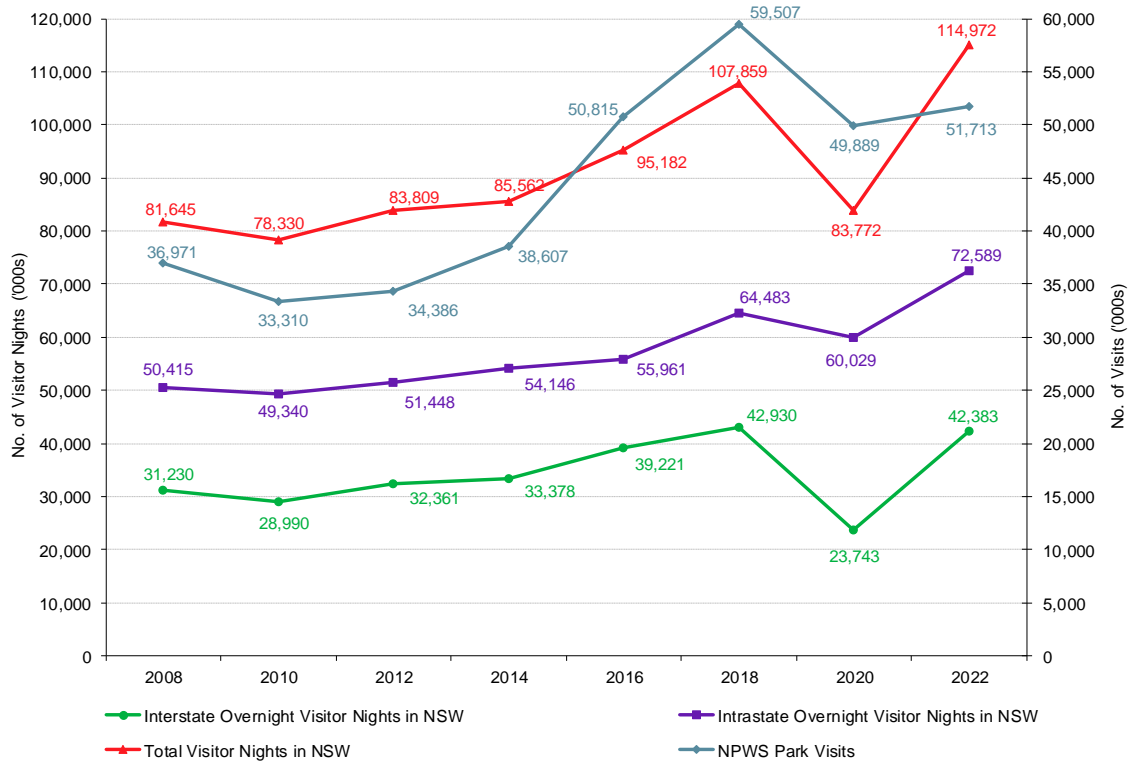
Chart 32: Annual NPWS Park Visitation versus Overnight Visitors to NSW



Sources: National Visitor Survey – Tourism Research Australia; NPWS Parks Visitor Surveys 2008-2022

The same result can be seen in Chart 33, which compares NPWS park visitation data with visitor nights in NSW.

Chart 33: Annual NPWS Park Visitation versus Visitors' Nights in NSW

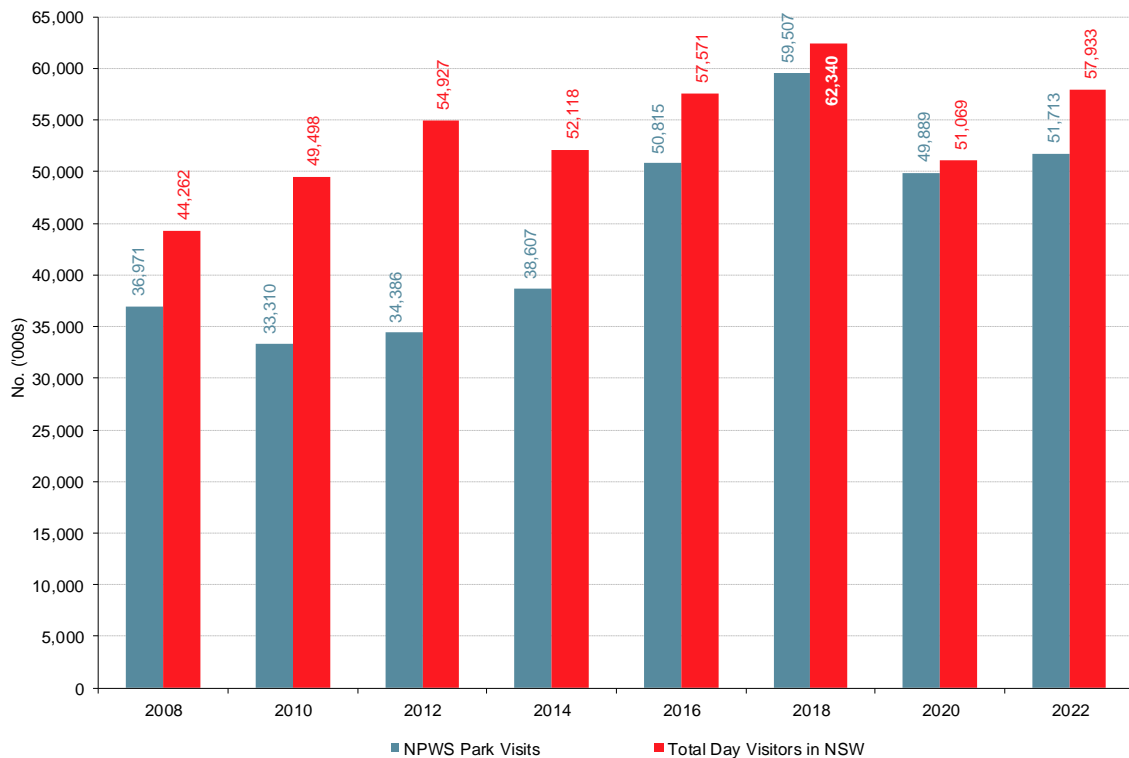


Sources: National Visitor Survey – Tourism Research Australia; NPWS Parks Visitor Surveys 2008-2022

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 since 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 34 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 and increased to 57.9m in 2022.

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, and rebounding slightly in 2022. The pattern displayed for day trip visitors in NSW is not evident in NPWS park visits.

Chart 34: Annual NPWS Park Visitation versus Day Visitors in NSW

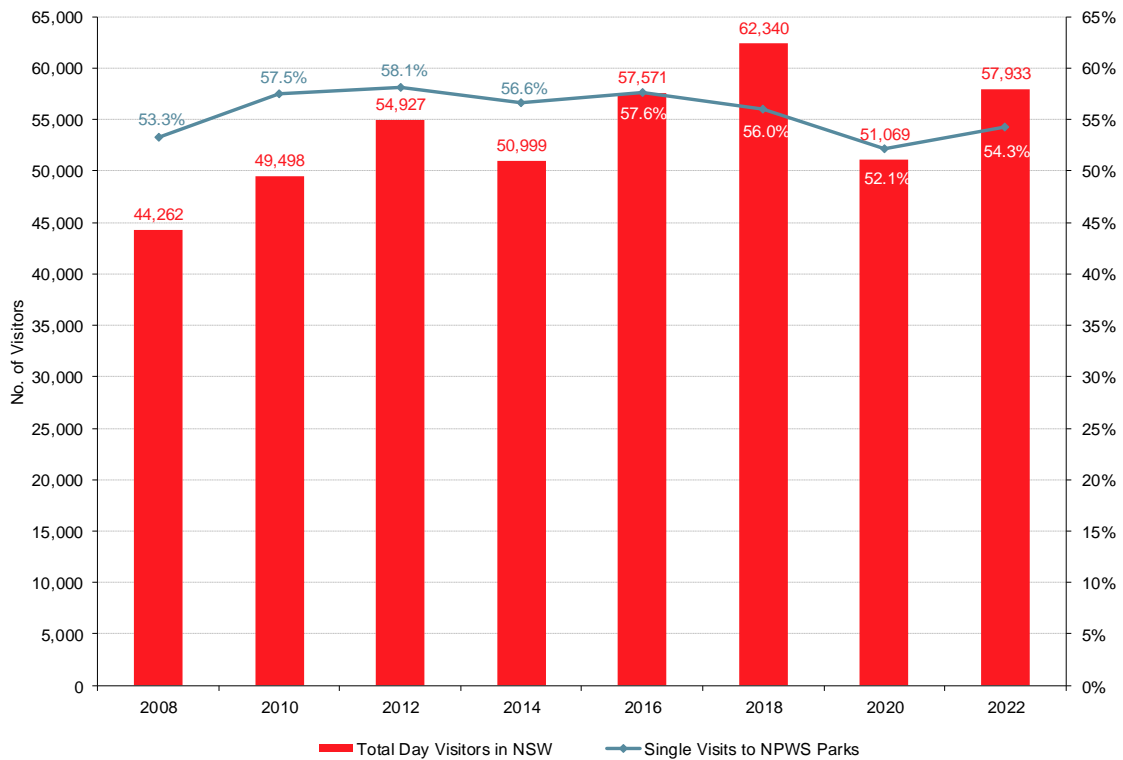


Sources: National Visitor Survey – Tourism Research Australia; NPWS Parks Visitor Surveys 2008-2018:

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 live 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 35 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 and an increase to 54.3% in 2022. However, the new question on duration of visit in 2018 to 2022 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 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 35: Single Visits to NPWS Parks versus Day Visitors in NSW

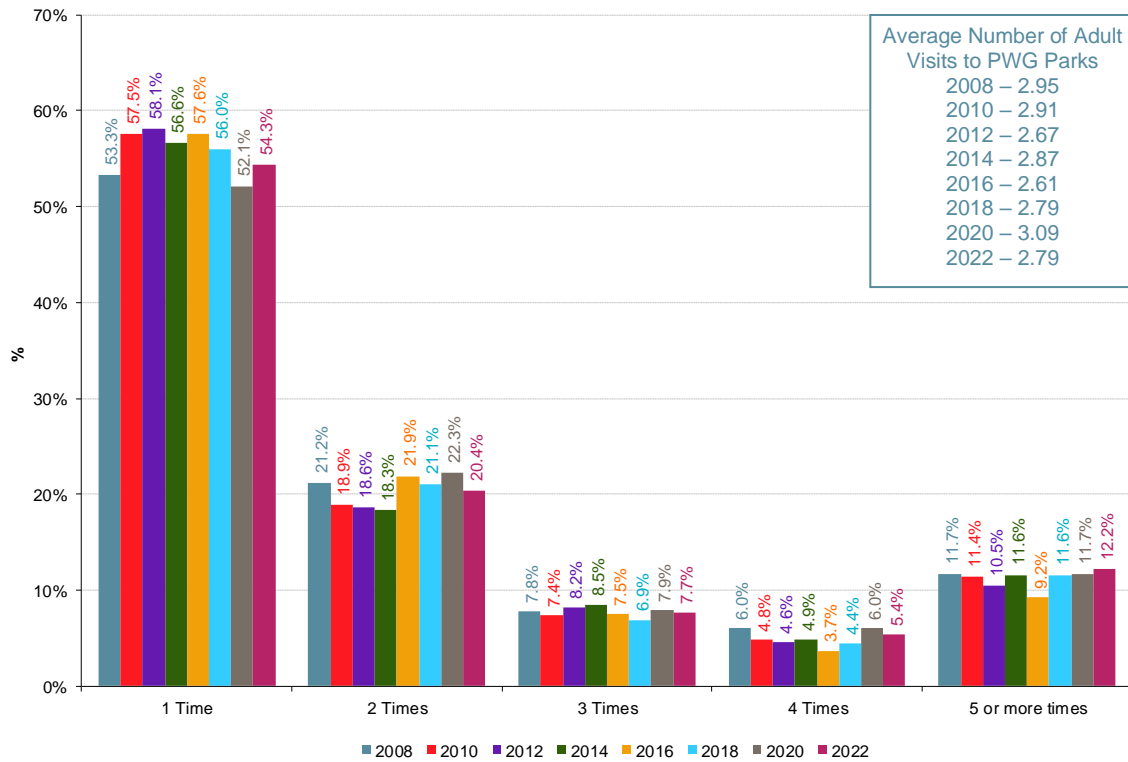


Sources: National Visitor Survey – Tourism Research Australia; NPWS Parks Visitor Surveys 2008-2018:

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 visits 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 2022.

In fact, as shown in Chart 36, there has been a downward trend from 2008 to 2014 in adults visiting NPWS parks 2 times (which rebounded from 2016 to 2022). 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 to 2022. 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 and 2022. 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 2020 to 3.09 visits and then declining slightly to 2.79 in 2022.

Chart 36: Number of Times Visiting a NPWS Park—Adult Visits



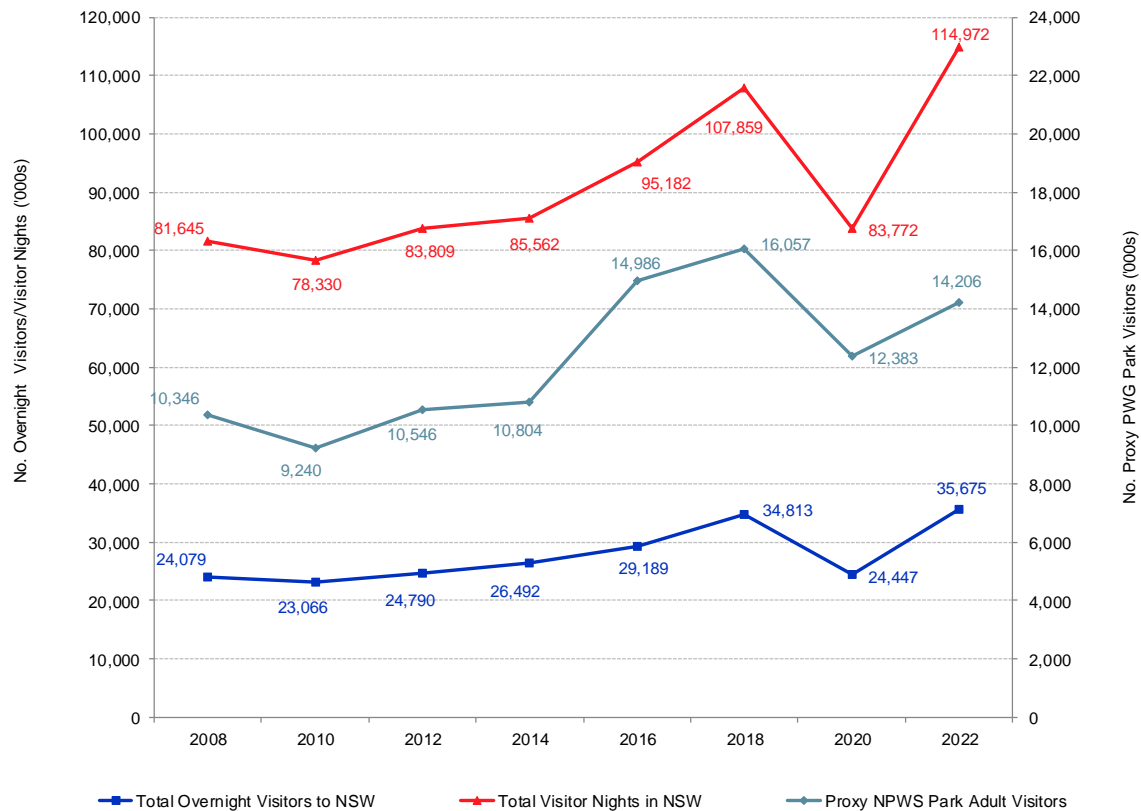
Source: NPWS Parks Visitor Surveys 2008 - 2022  
 Base: 2008 n=1,563; 2010 n=1,468; 2012 n=1,457; 2014 n=1,667; 2016 n=1,728, 2018 n=1,739; 2020 n= 1,178| 2022 n=1,382

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<sup>25</sup>. Chart 37 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 Bushfires and COVID-19 in 2020.

However, in 2022, the proxy for NPWS adult park visitors, while increasing markedly on 2020 estimates (from 12,383 to 14,206), did not exceed 2018 levels (16,057 - which was the case for overnight visitors to NSW and total visitor nights in NSW). Therefore, while for most years NPWS park visitors do mirror overnight visit to NSW, this was not the case in 2022.

<sup>25</sup> 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 37: Proxy NPWS Park Visitors versus Overnight Visitation to NSW

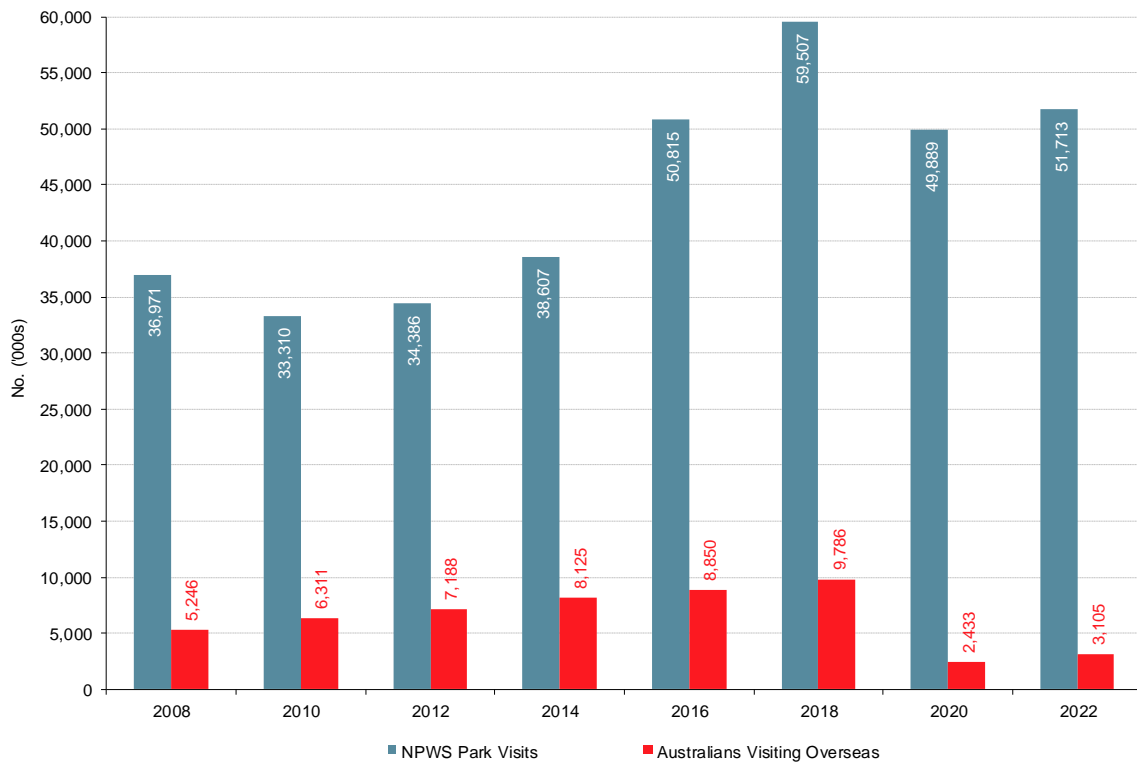


Sources: National Visitor Survey – Tourism Research Australia; NPWS Parks Visitor Surveys 2008-2022:

### 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 38 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 from 2018 to 2020 (16.2% and 75.2% respectively). Similarly, the growth in NPWS park visits from 2020 to 2022 was not in the same magnitude as the growth in Australians visiting overseas over the same period (3.7% vs 27.6% growth). The marked decline in Australians travelling overseas was due to international border closers due to COVID-19 in 2020. Similarly, while restrictions for visiting overseas have been relaxed in 2022, there is still reticence to travel overseas. Therefore, as 2020 and 2022 have been unique years for international visitation, conclusions should not be drawn for any trends over time which include 2020 and 2022 data.

Chart 38: Annual NPWS Park Visitation versus Australians Visiting Overseas



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

Chart 39 following compares monthly NPWS park visitation with exchange rates (i.e. the Trade Weighted Index divergence from the 16 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 2022, 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.

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 one of their least competitive for overseas travel. This again occurred in early 2018 and early 2022. 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 can take the opportunity to travel overseas i.e. the northern summer).

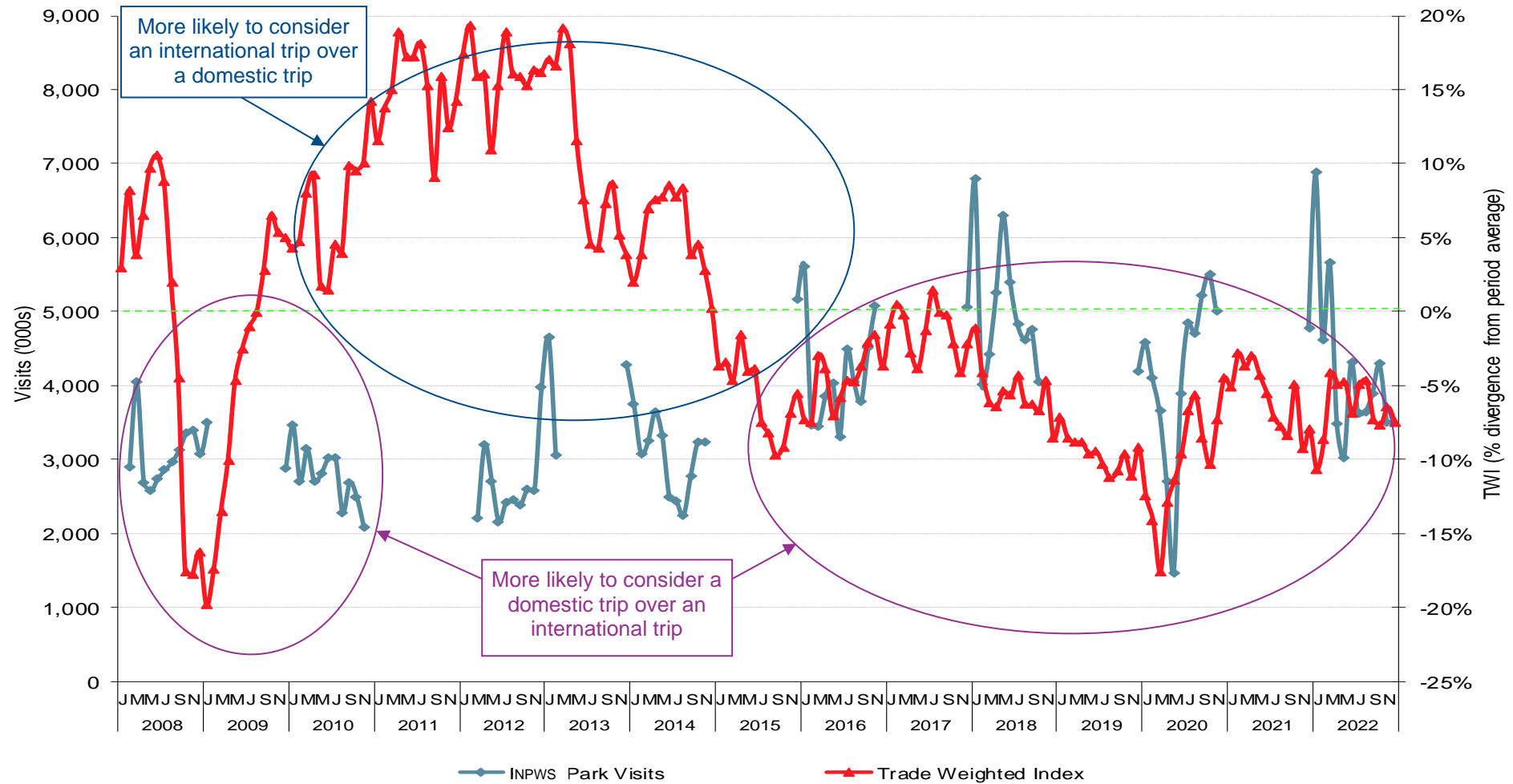
A strong Australian dollar encourages Australians to visit overseas at the expense of taking domestic trips – either reducing the total number of domestic trips made or reducing the length of stay. From overnight visitation data we know that the total number of visitor nights to NSW has increased by 40.8% from 2008 to 2022. However, the number of overnight visitors to NSW has



### ***2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks***

increased by 48.2% 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 and in 2020 to 3.09, back to 2.79 in 2022), 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 39: 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.

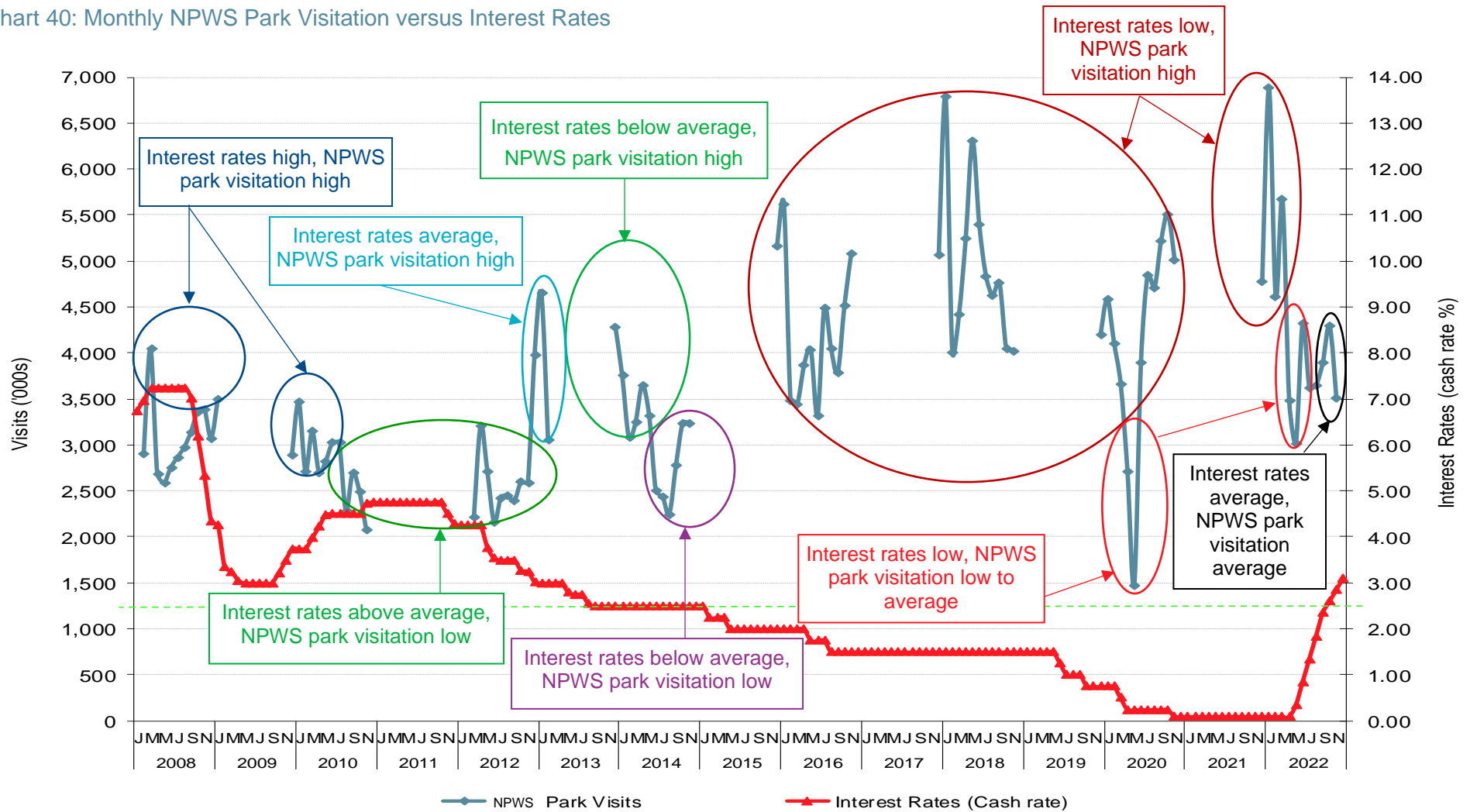
Chart 40 compares monthly NPWS park visitation with monthly interest rates. For the first nine months of 2008 interest rates were high (7.00%-7.25%), yet NPWS park visitation was high. 2009 saw interest rates fall sharply to 3.00% and then steadily rise in 2010 from 3.75% to 4.75%. This rise in interest 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 November 2021 and remained at this level until August 2022. From this date interest rates have climbed sharply to 3.10% in December 2022. 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 COVID-19 in autumn 2020, but then rebounded to high levels until the end of March 2022. Visits have since been average to below average for the rest of 2022.

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. Visitation was high when interest rates were low until COVID-19 hit in March 2020, but rebounded again until March 2022. Visitation has since fallen as interest rates began to rise. It would therefore appear that park visitation is not strongly linked with interest rates.

Chart 41 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, last half of 2022). 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, first half of 2022). For the most part though, it does appear that there is a weak direct relationship between high consumer confidence and high park visitation.

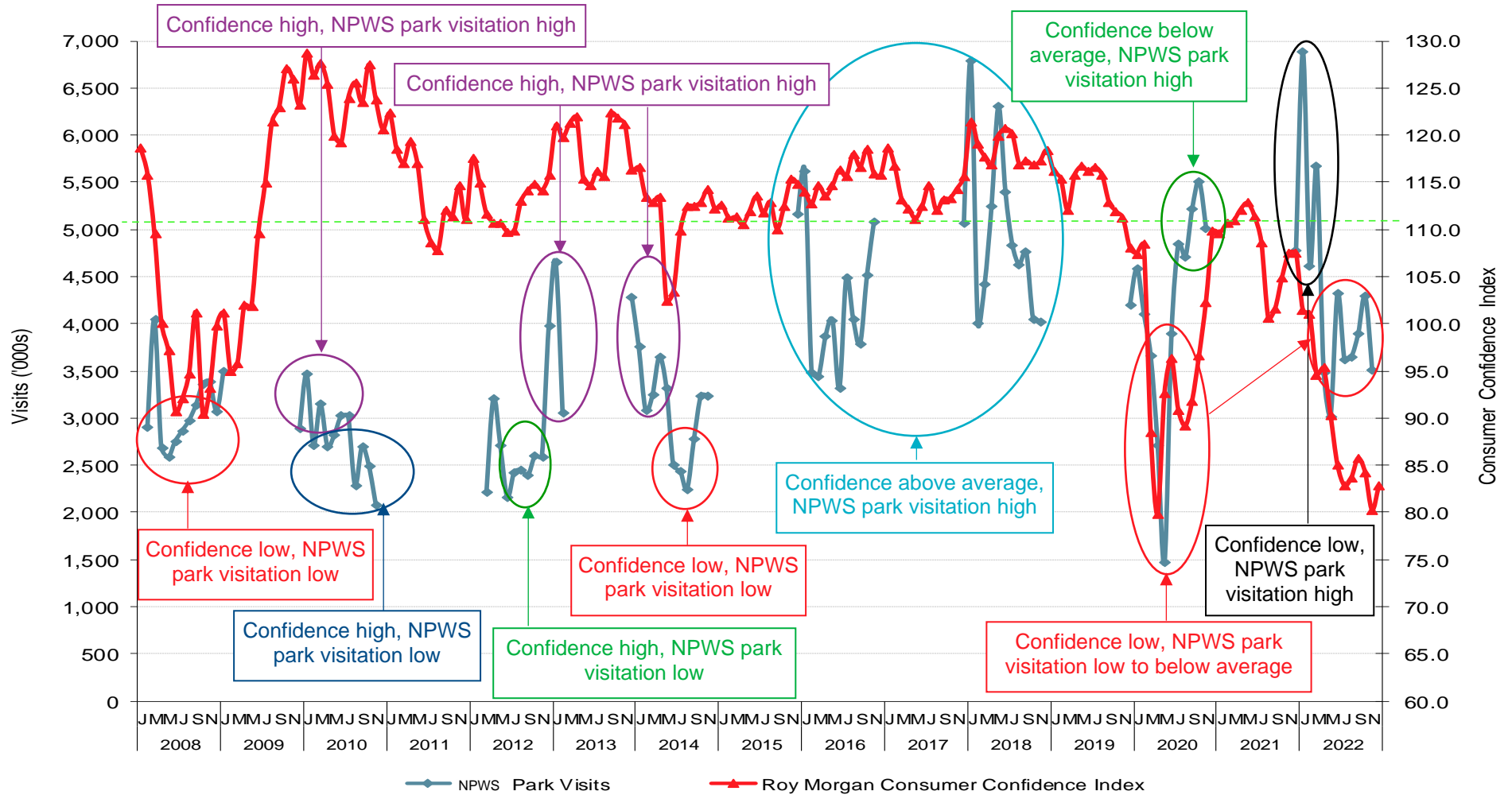
Chart 42 shows changes in monthly Sydney fuel prices compared with the average fuel price for the 16 year survey period. As can be seen, the general trend is that when fuel prices are higher than average, NPWS park visitation is lower at the corresponding part of that specific year, or when fuel prices 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 reverses - for all of 2010, at the end of 2012, in 2020 and at the start of 2022.

Chart 40: Monthly NPWS Park Visitation versus Interest Rates



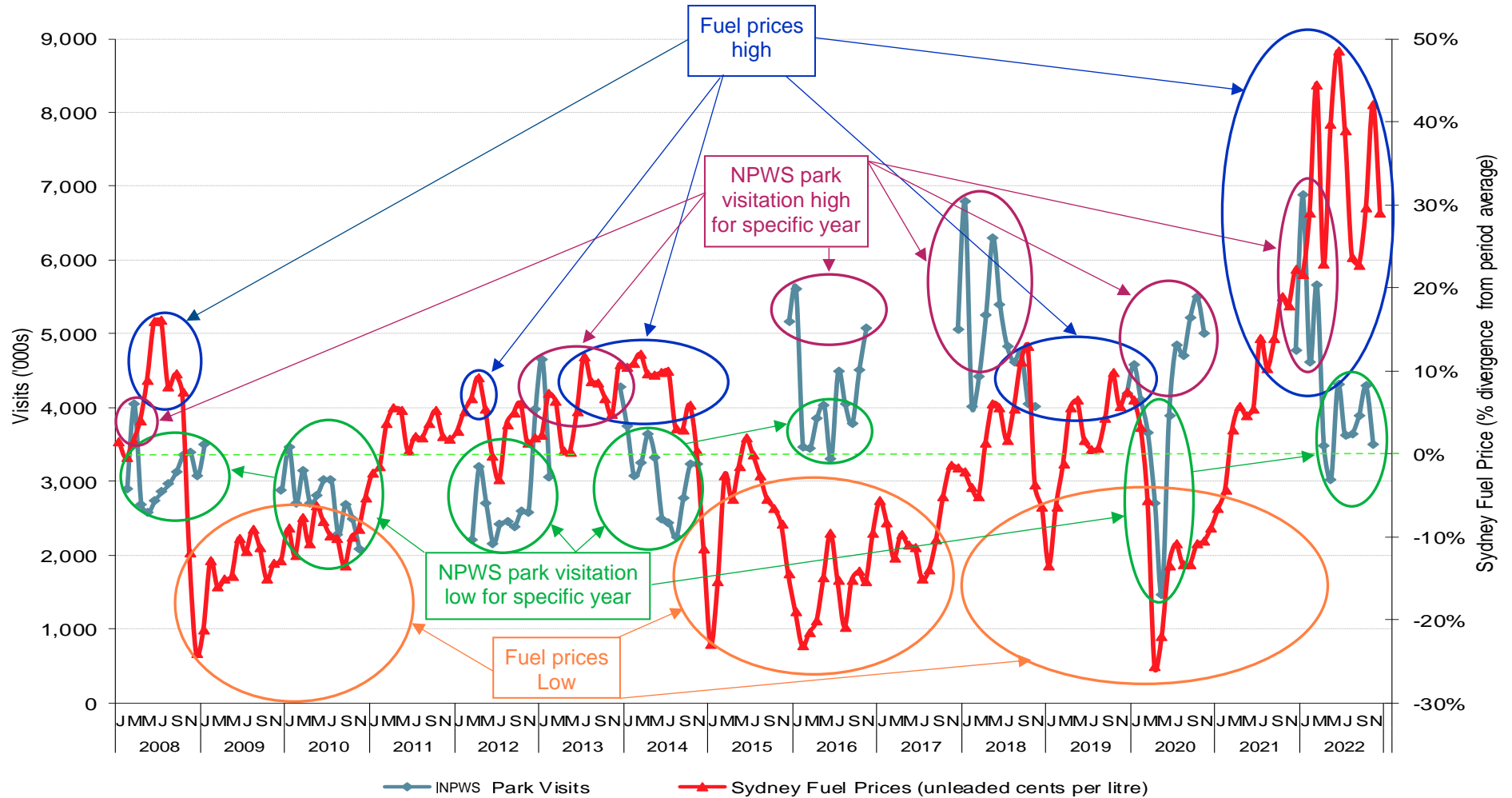
Source: Reserve Bank of Australia—Cash Rate

Chart 41: Monthly NPWS Park Visitation versus Consumer Confidence



Source: Roy Morgan Single Source: Roy Morgan Consumer Confidence

Chart 42: 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 2022. 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 43 compares monthly NPWS park visitation to monthly maximum daytime temperatures displayed as a divergence from the average<sup>1</sup>. From 2008 to 2012, from 2016 to 2018 and in 2020 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. That stated, the standard trend of visits increasing as temperature increases above the average still holds for parts of 2014 and 2020 (Jan-Feb, May-Oct 2014; and April-Sep 2022).

Charts 44 to 51 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 from 2012 to 2020). However, from, 2008 to 2010 and in 2022, the opposite trend occurred. The general trend is therefore 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 and from 2020 to 2022 the opposite trend was evident. Obviously, there is no clear trend as to whether temperature above the average impacts on NPSW park visits to the North Cost Branch.

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 018 and 2022, 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 is evident as a result of temperature. In 2008, 2016 and 2018 visits increased as temperature above the average increased, but from 2010 to 2014 and from 2020 to 2022, 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 2022, but trended in the opposite direction in 2010 and 2016 to 2020.

---

<sup>1</sup> Divergence from the average is calculated using 53 weather stations across the state, representing each NPWS Region. Average is based on the BoM average for each weather station.

## **2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

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 2022.

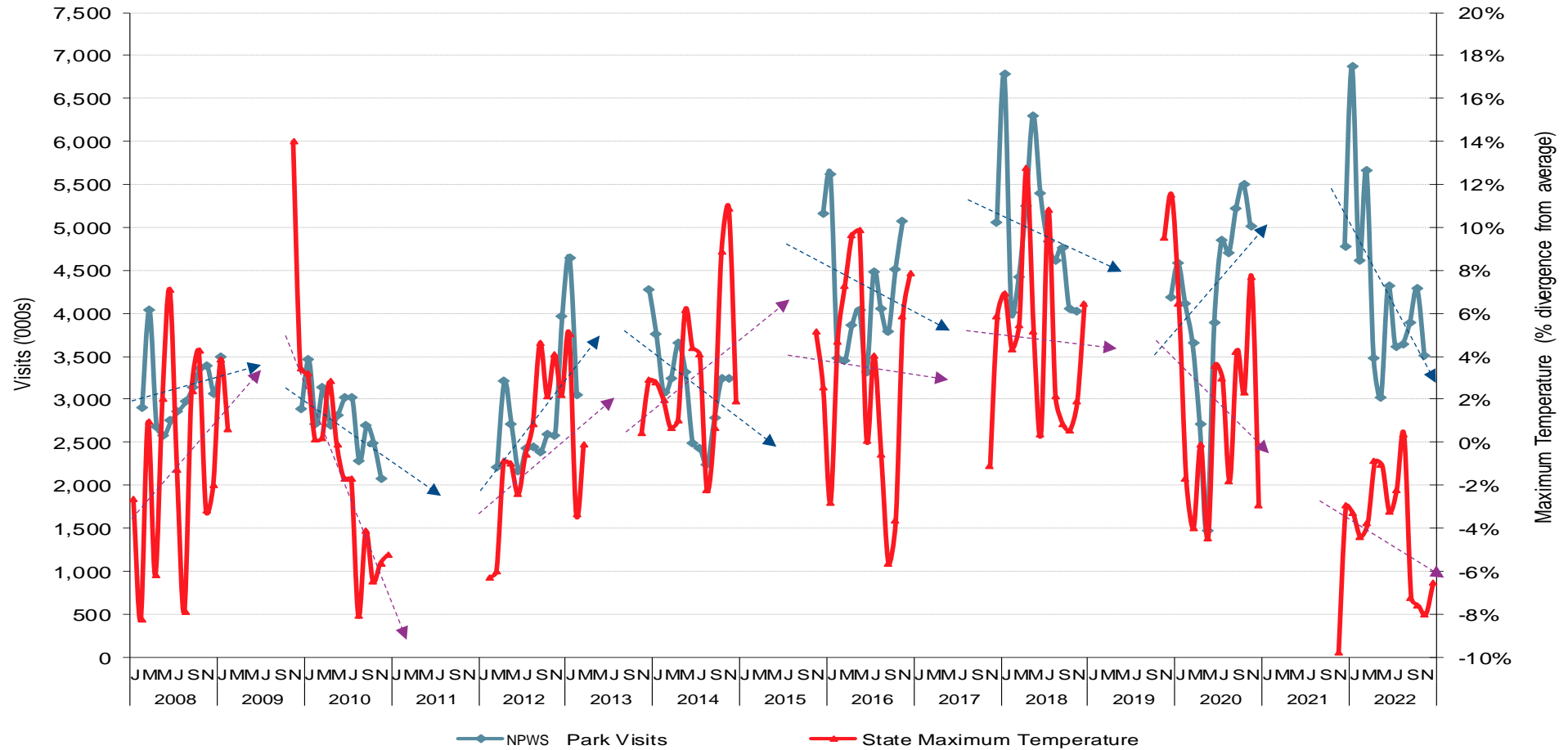
Analysis of visitation to parks in the *Northern Inland Branch* should be treated with caution due to small sample sizes. However, visits generally tended to increase when temperature was above the average in 2008, 2012, 2016, 2018 and 2022, but declined with temperature in 2010, 2014 and 2020.

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 then returned to decreasing as temperature increased above the average for 2022.

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 or Branch 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.



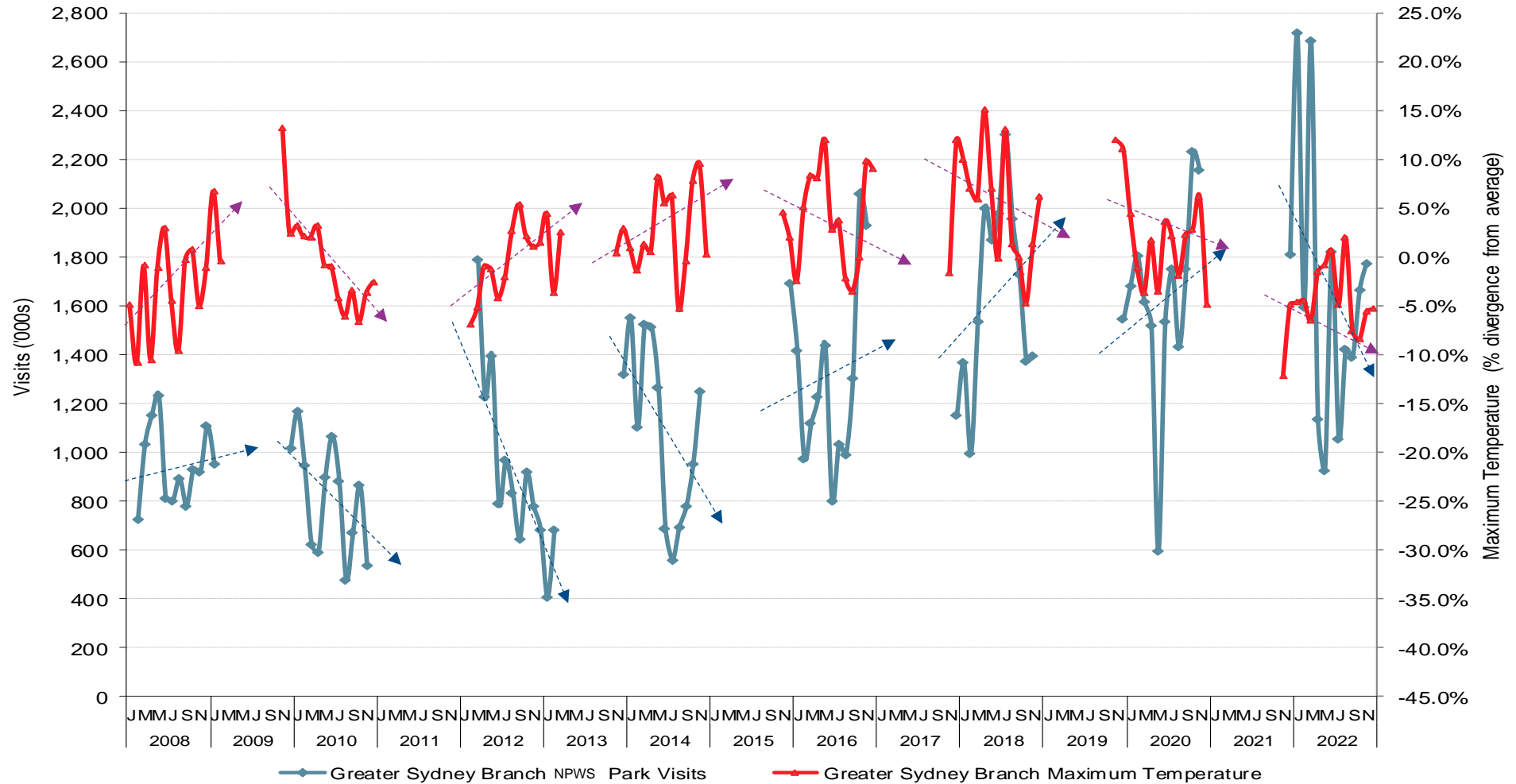
Chart 43: Monthly NPWS Park Visitation versus Monthly Temperature<sup>27</sup>



Source: Bureau of Meteorology – Climate data online 20018-2022 – Mean maximum temperature = Average of 53 weather stations across NSW.

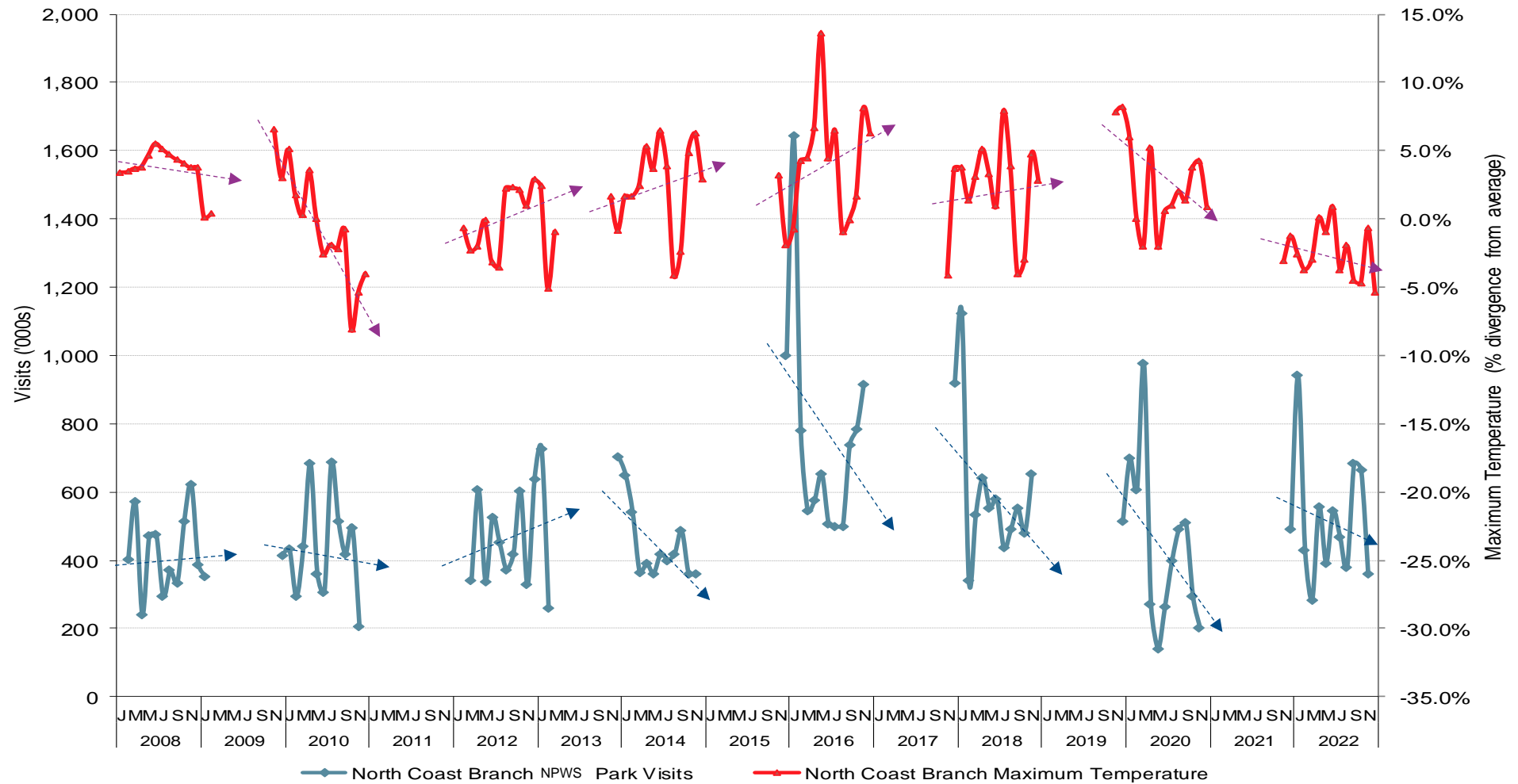
<sup>27</sup> Linear trend lines have been fitted to assist with description of findings for this chart and all following charts.

Chart 44: Monthly NPWS Park Visitation versus Monthly Temperature - Greater Sydney Branch



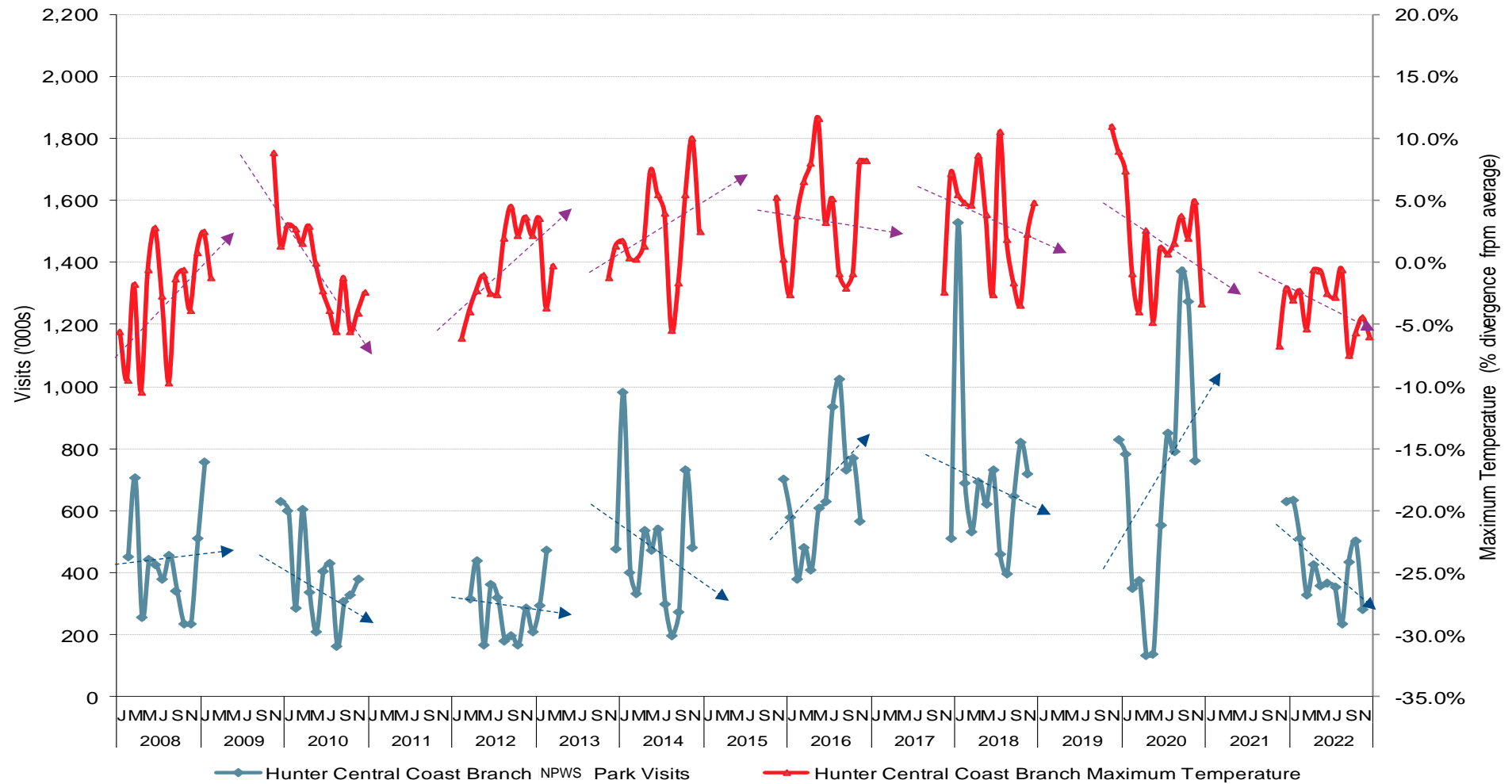
Source: Bureau of Meteorology – Climate data online 20018-2022 – Mean maximum temperature = Average of 5 weather stations across the Greater Sydney Branch geographic region.

Chart 45: Monthly NPWS Park Visitation versus Monthly Temperature - North Coast Branch



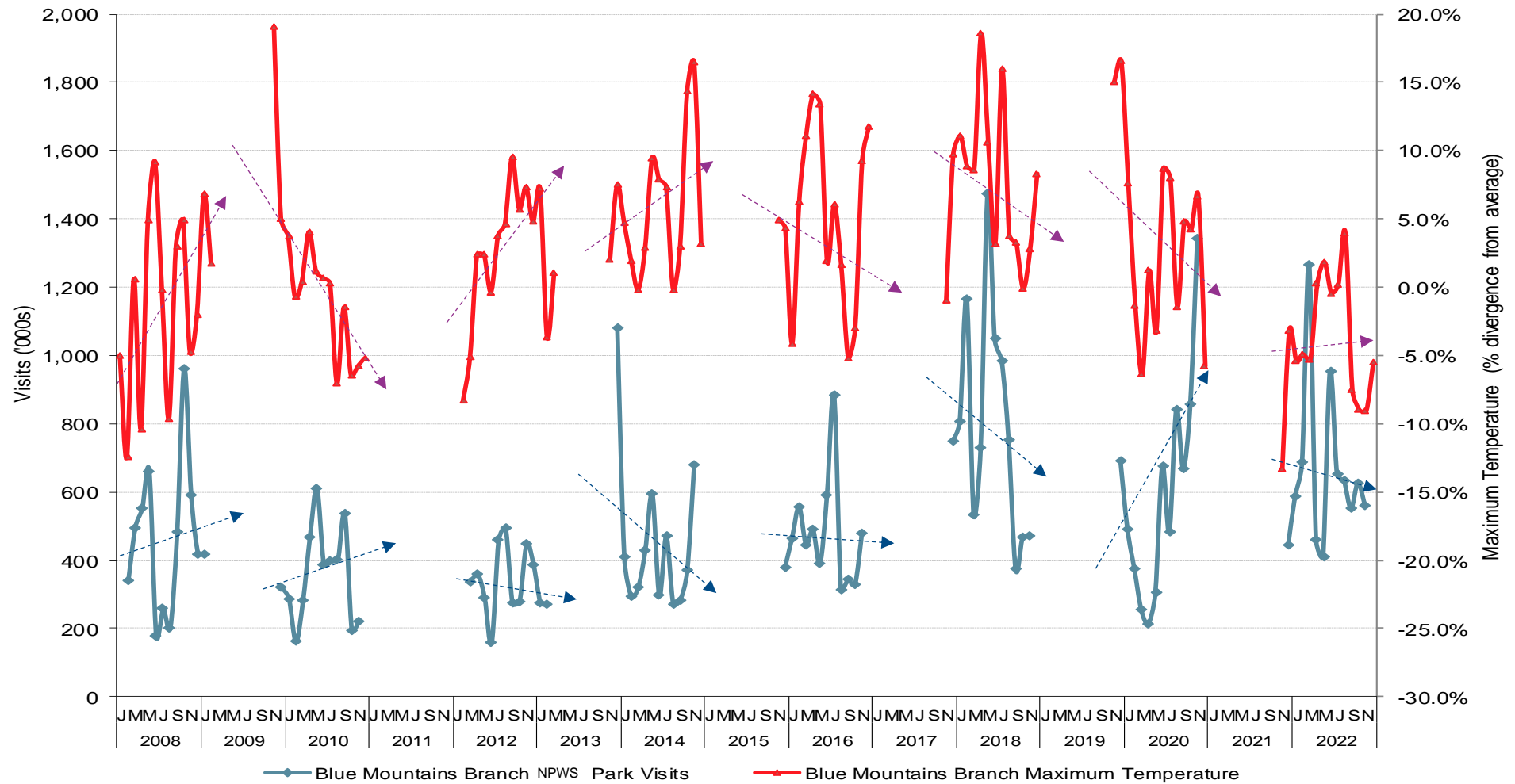
Source: Bureau of Meteorology – Climate data online 20018-2022 – Mean maximum temperature = Average of 8 weather stations across the North Coast Branch geographic region.

Chart 46: Monthly NPWS Park Visitation versus Monthly Temperature - Hunter Central Coast Branch



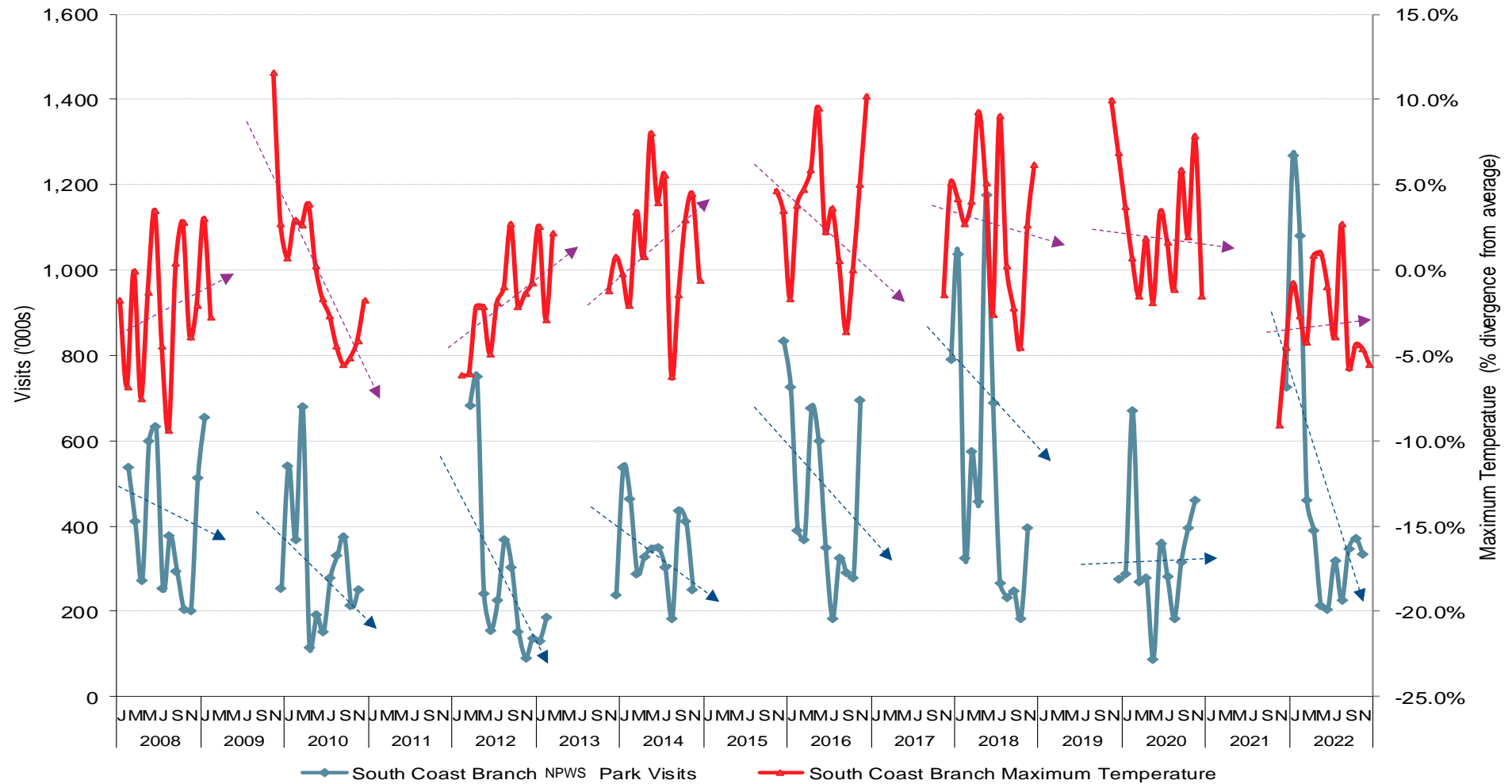
Source: Bureau of Meteorology – Climate data online 20018-2022 – Mean maximum temperature = Average of 8 weather stations across the Hunter Central Coast Branch geographic region.

Chart 47: Monthly NPWS Park Visitation versus Monthly Temperature - Blue Mountains Branch



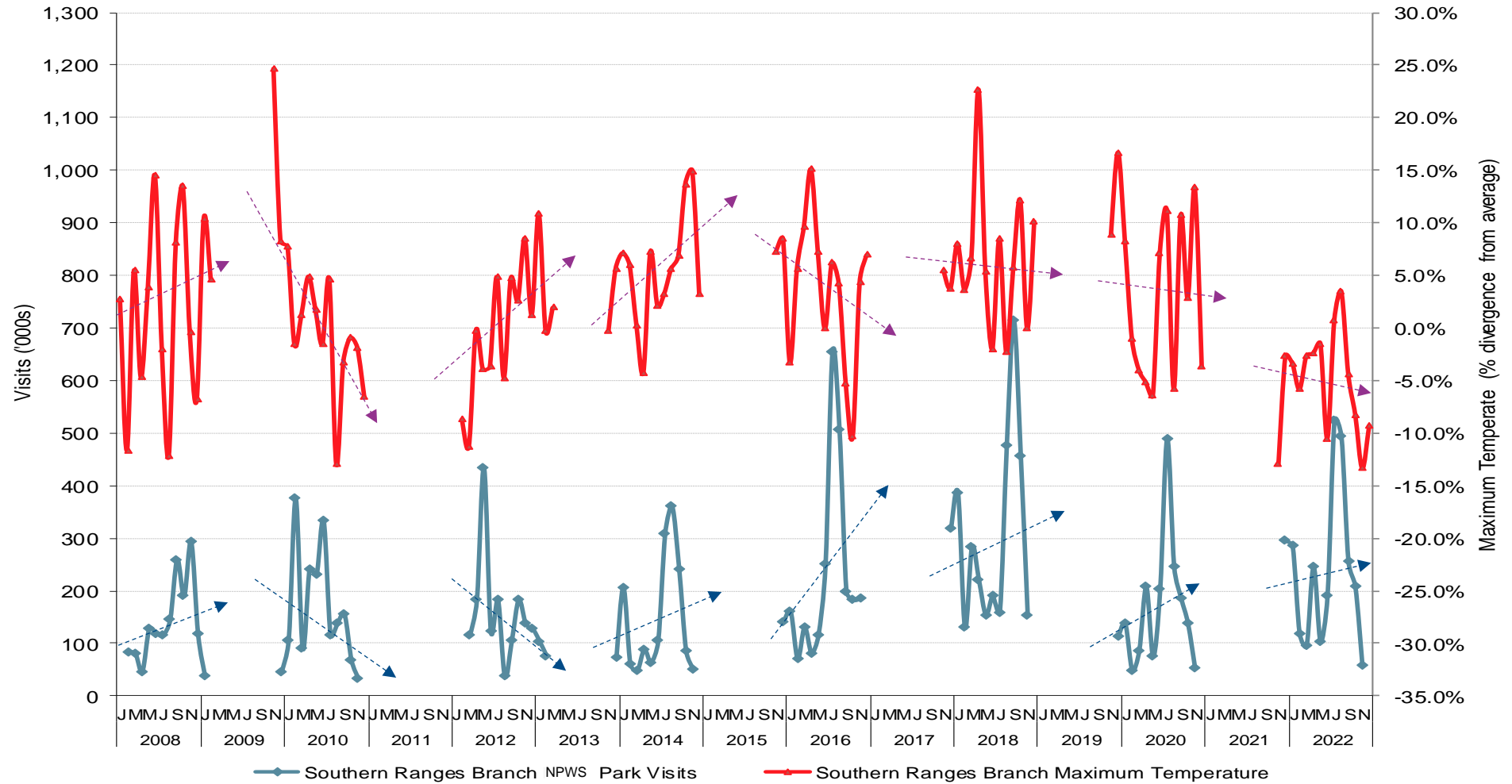
Source: Bureau of Meteorology – Climate data online 20018-2022 – Mean maximum temperature = Average of 6 weather stations across the Blue Mountains Branch geographic region.

Chart 48: Monthly NPWS Park Visitation versus Monthly Temperature - South Coast Branch



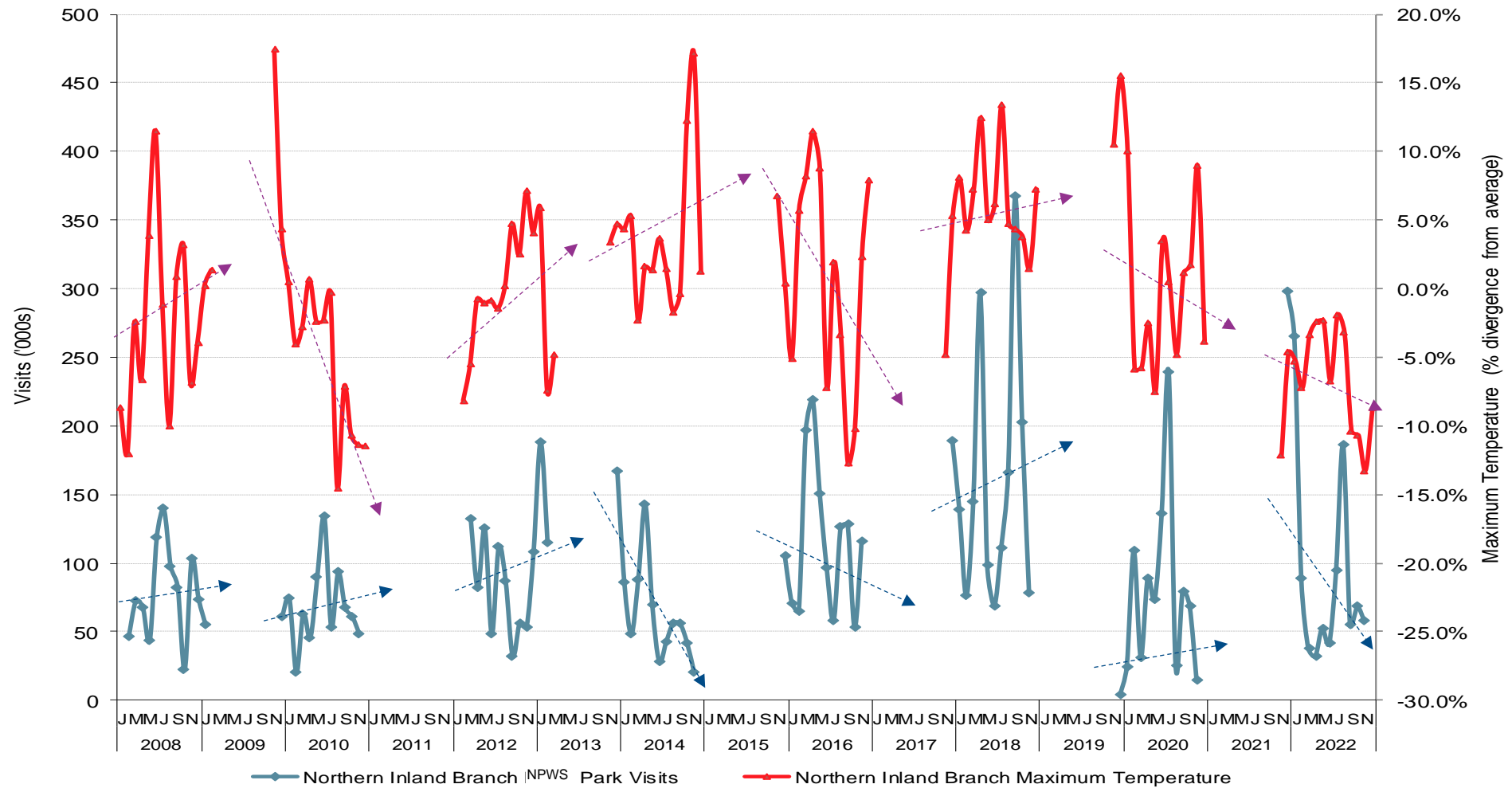
Source: Bureau of Meteorology – Climate data online 20018-2022 – Mean maximum temperature = Average of 7 weather stations across the South Coast Branch geographic region.

Chart 49: Monthly NPWS Park Visitation versus Monthly Temperature - Southern Ranges Branch



Source: Bureau of Meteorology – Climate data online 20018-2022 – Mean maximum temperature = Average of 6 weather stations across the Southern Ranges Branch geographic region.

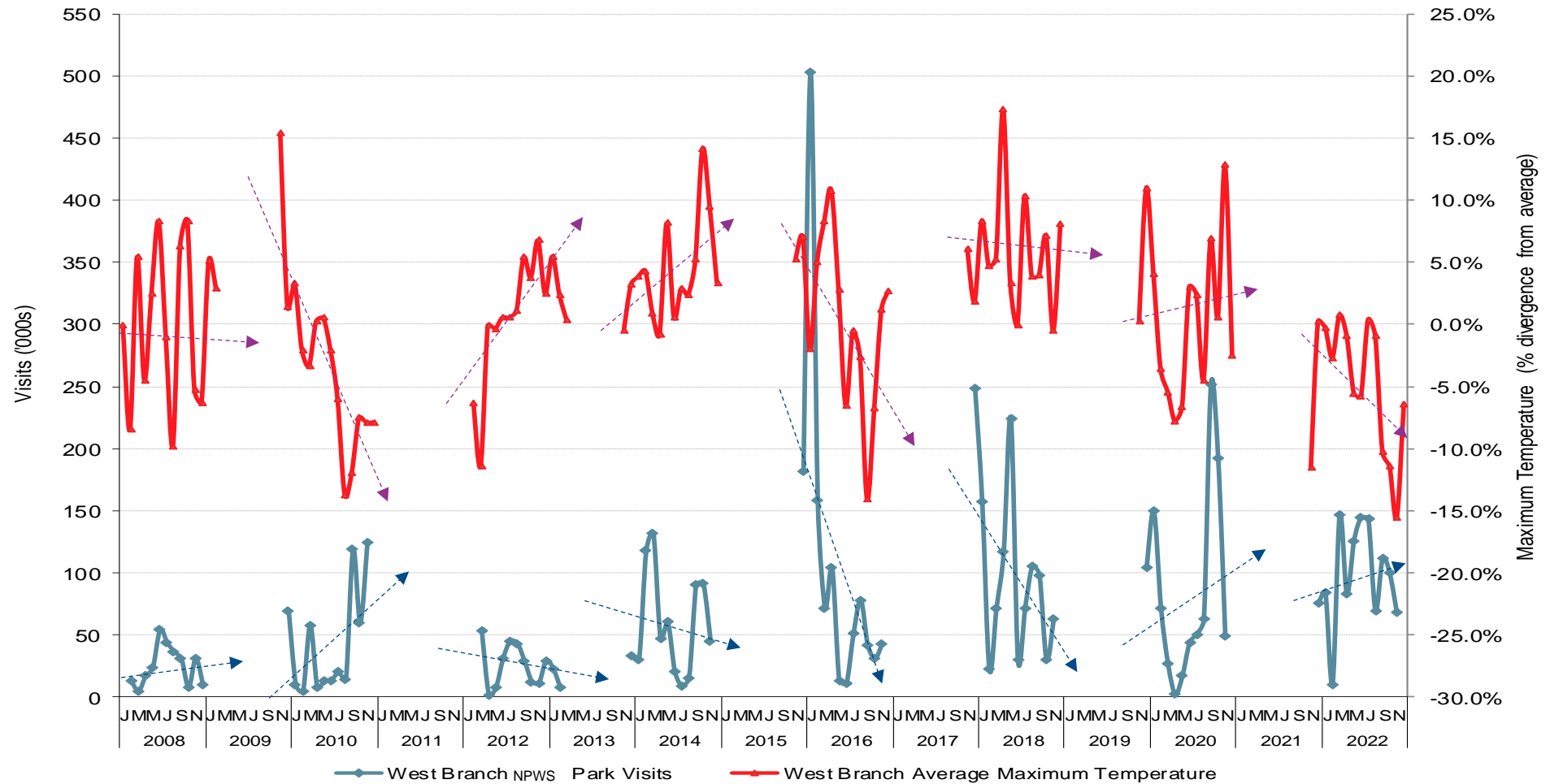
Chart 50: Monthly NPWS Park Visitation versus Monthly Temperature - Northern Inland Branch



Source: Bureau of Meteorology – Climate data online 20018-2022 – Mean maximum temperature = Average of 8 weather stations across the Northern Inland Branch geographic region.



Chart 51 Monthly NPWS Park Visitation versus Monthly Temperature - West Branch



Source: Bureau of Meteorology – Climate data online 20018-2022 – Mean maximum temperature = Average of 5 weather stations across the West Branch geographic region.

### 7.5.2 Rainfall Effects on NPWS Park Visitation

Chart 52 compares monthly NPWS park visitation to monthly rainfall displayed as a divergence from the average<sup>28</sup>. From 2008 to 2014 and again in 2018 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 to 2022 a slightly weaker counter trend is evident – the more rainfall was above the average, the more visits there were.

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. 2022 had the wettest summer on record and the wettest autumn since 1990 and the wettest spring on record, which would all impact on reduced visitation

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.

Charts 53 to Chart 60 compare 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 from 2008 to 2016 (2012 being the exception). However, since 2018, 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, 2016 and 2020. This Branch has experienced significant rainfall events in 2008, 2010, 2014, 2016, 2020 and 2022. Most of these occur in August-October, but two have recently been observed in February-March 2020 and 2022, which would have significantly impacted on visits.

Visitation to parks in the *Hunter Central Coast Branch* followed the trend whereby visitation increased when rainfall decreased below the average in 2008, 2010 and from 2014 to 2018. However, the opposite trend was evident in 2012, 2020 and 2022. 2022 experienced some significant rain events in this Branch, with rainfall 150% above the average in November 2021 and March 2022 and 365% above the average in June. This amount of rainfall (over 150% of the average) has only occurred once in all the other intervening years (April 2008), so it is not surprising that NPWS visits in 2022 were well down for this Branch.

In 2010, 2012 and 2018 visitation to parks in the *Blue Mountains Branch* tended to increase when rainfall decreased below the average. However, in 2008, 2010, 2016, 2020 and 2022 the opposite trend was evident. In the 2022 season, rainfall was over 150% above the average in November 2021 (186%), March 2022 (236%) and June 2022 (433%), the highest levels of rainfall recorded. This must have impacted negatively on visitation for this Branch.

---

<sup>28</sup> Divergence from the average is calculated using 54 weather stations across the state, representing each NPWS Region. Average is based on the BoM average for each weather station.

## **2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

For the *South Coast Branch* visitation increased as rain increased above the average in 2008, 2012 and from 2016 to 2022, but behaved in the opposite manner only in 2010 and 2014. For the 2022 season there were four months where rainfall was over 150% above the average – March (281%). July (224%). September (156%) and October (230%). In 2010, 2012, 2014, 2016 and 2020 there was just one month where rainfall exceeded 150% above the average, so 2022 was significantly wetter than other years, which must have impacted negatively on visitation.

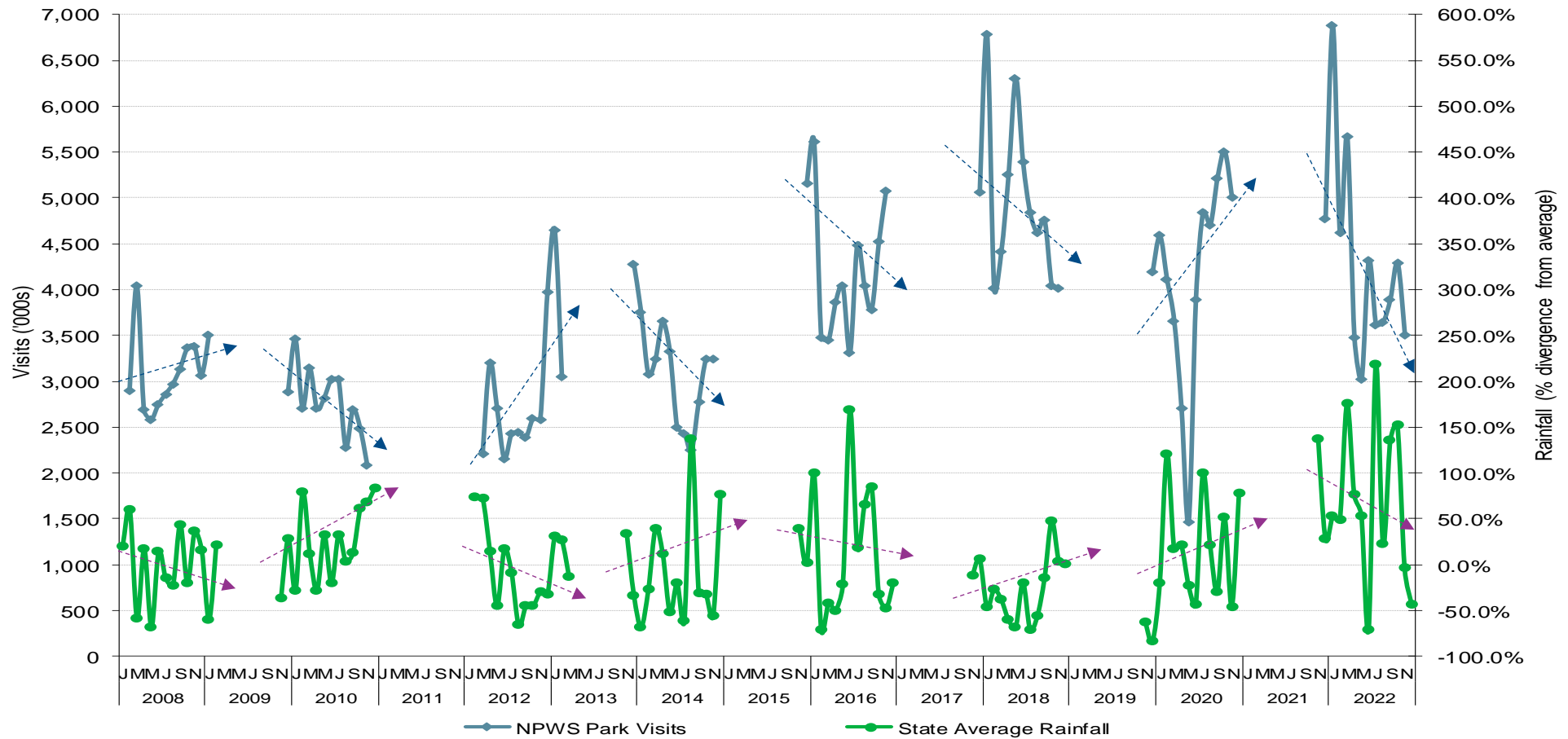
Visitation to the *Southern Ranges Branch* increased as rain fell below the average in 2008, 2010, 2018 and 2022, but the opposite trend was evident from 2012 to 2016 and in 2020, indicating that no real trend is evident in relation to rainfall.

Visitation to parks in the *Northern Inland Branch* should be analysed with caution due to small sample sizes. In 2008, 2010 and 2018 to 2022 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 and 2022 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 2010 that as rainfall increased above the average, NPWS park visitation decreased. This trend was again evident in 2014 and 2018 to 2020. The relationship between rainfall and park visitation tends to be about as strong as 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.

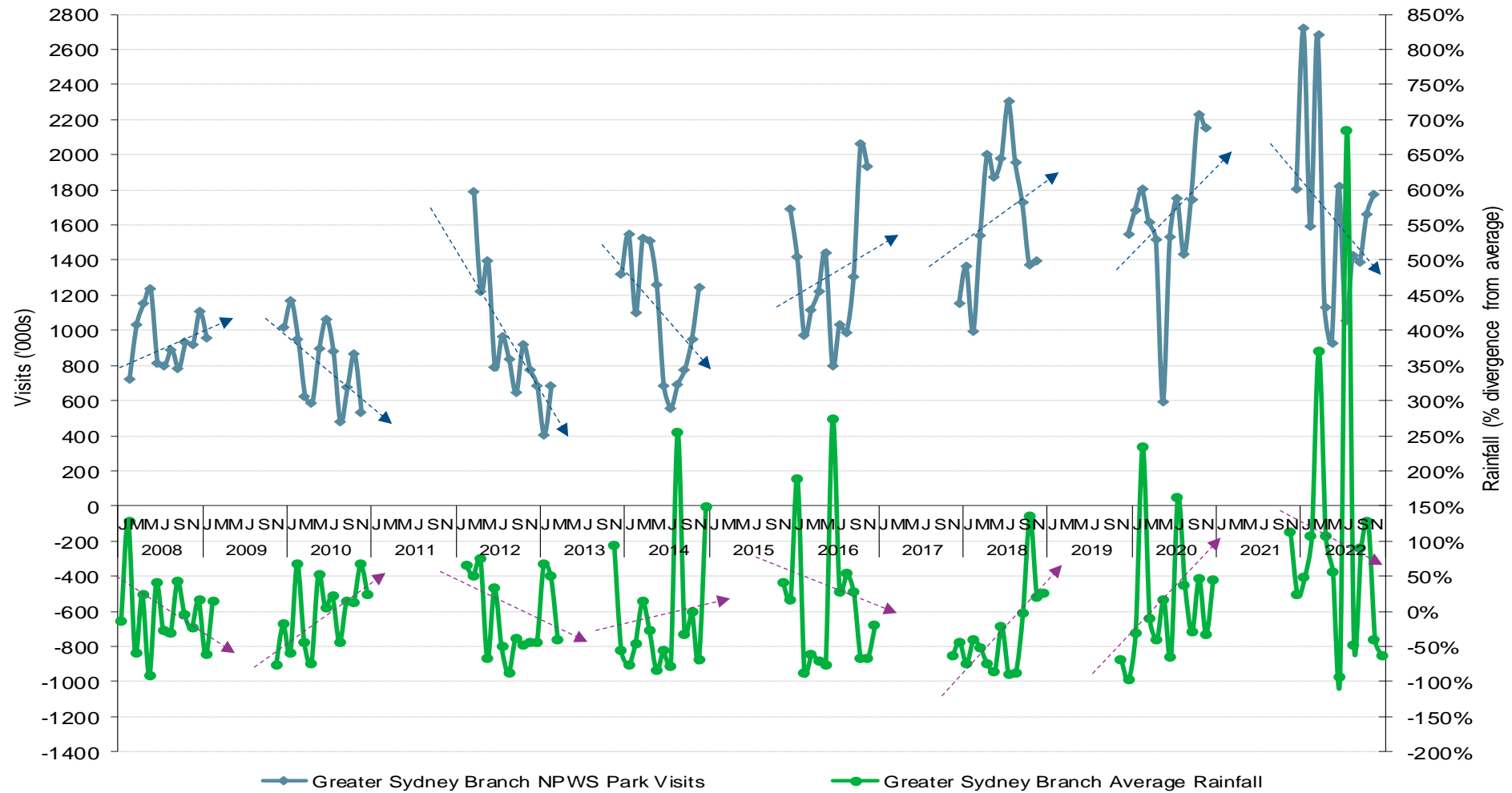
Chart 52: Monthly NPWS Park Visitation versus Monthly Rainfall<sup>29</sup>



Source: Bureau of Meteorology – Climate data online 2008-2022 – Monthly Rainfall = Average of 54 weather stations across NSW.

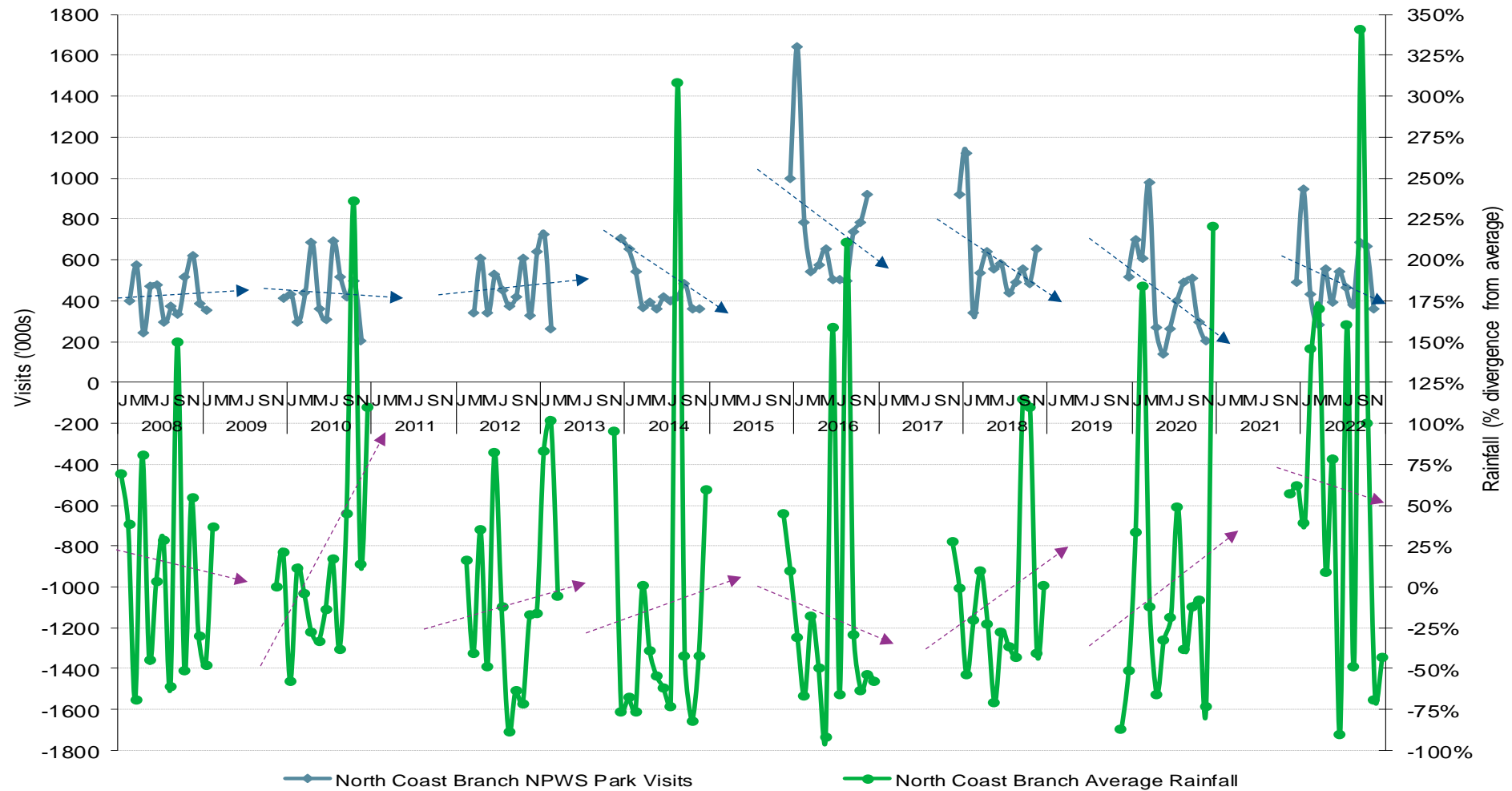
<sup>29</sup> Linear trend lines have been fitted to assist with description of findings for this chart and all following charts.

Chart 53: Monthly NPWS Park Visitation versus Monthly Rainfall - Greater Sydney Branch



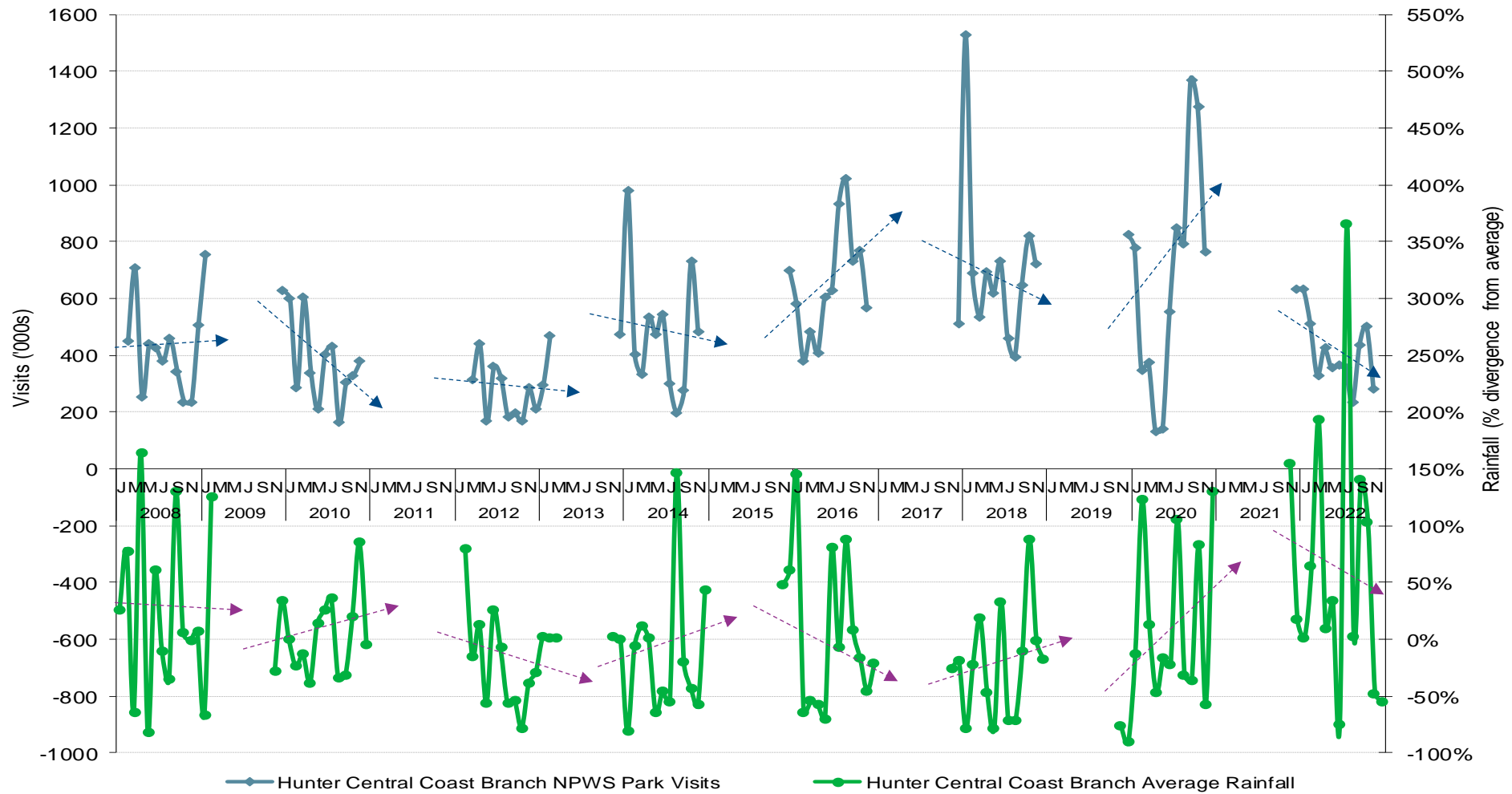
Source: Bureau of Meteorology – Climate data online 2008-2022 – Monthly Rainfall = Average of 6 weather stations across the Great Sydney Branch geographic region.

Chart 54: Monthly NPWS Park Visitation versus Monthly Rainfall - North Coast Branch



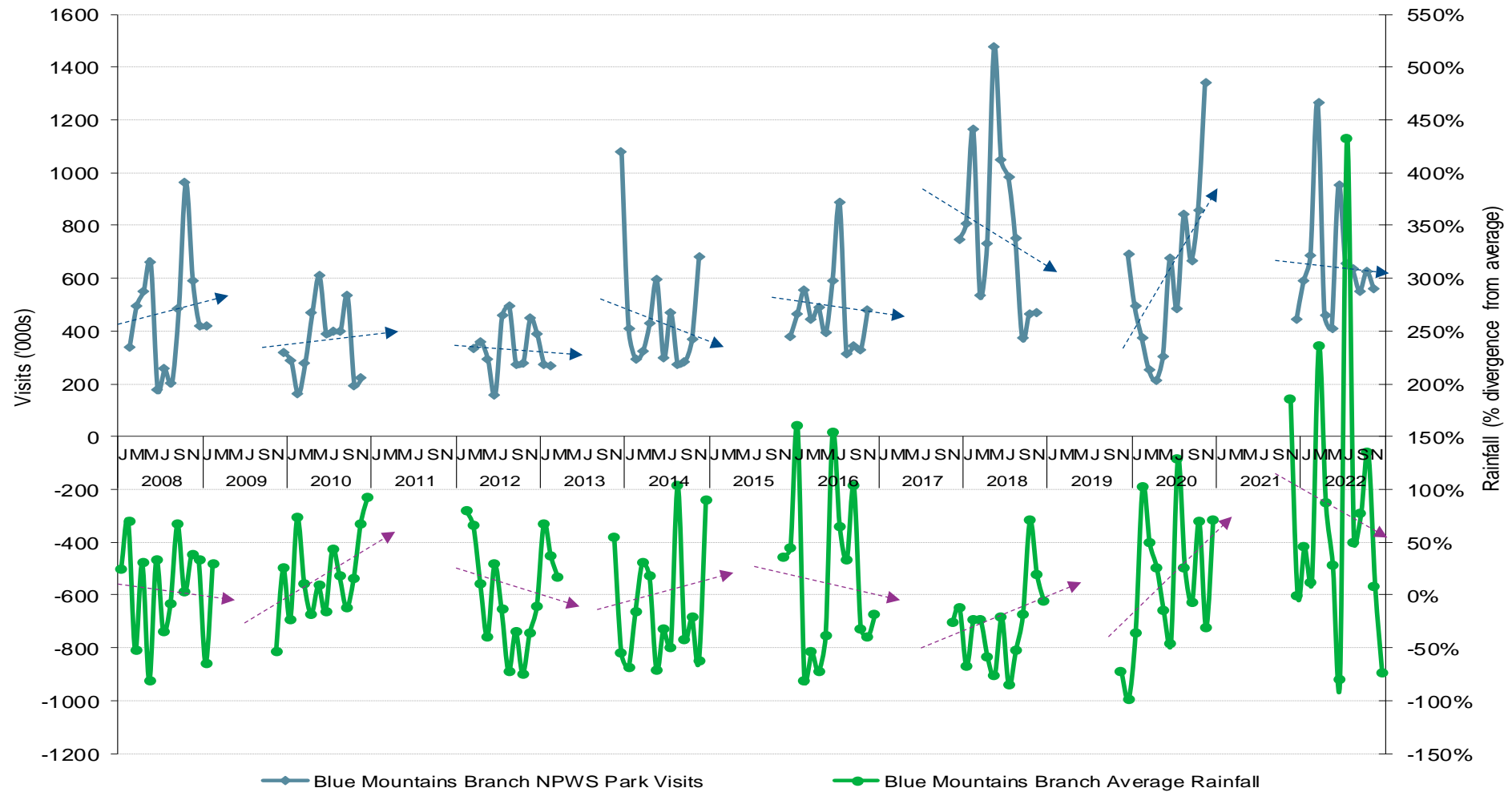
Source: Bureau of Meteorology – Climate data online 2008-2022 – Monthly Rainfall = Average of 8 weather stations across the North Coast Branch geographic region.

Chart 55: Monthly NPWS Park Visitation versus Monthly Rainfall - Hunter Central Coast Branch



Source: Bureau of Meteorology – Climate data online 2008-2022 – Monthly Rainfall = Average of 8 weather stations across the Hunter Central Coast geographic region.

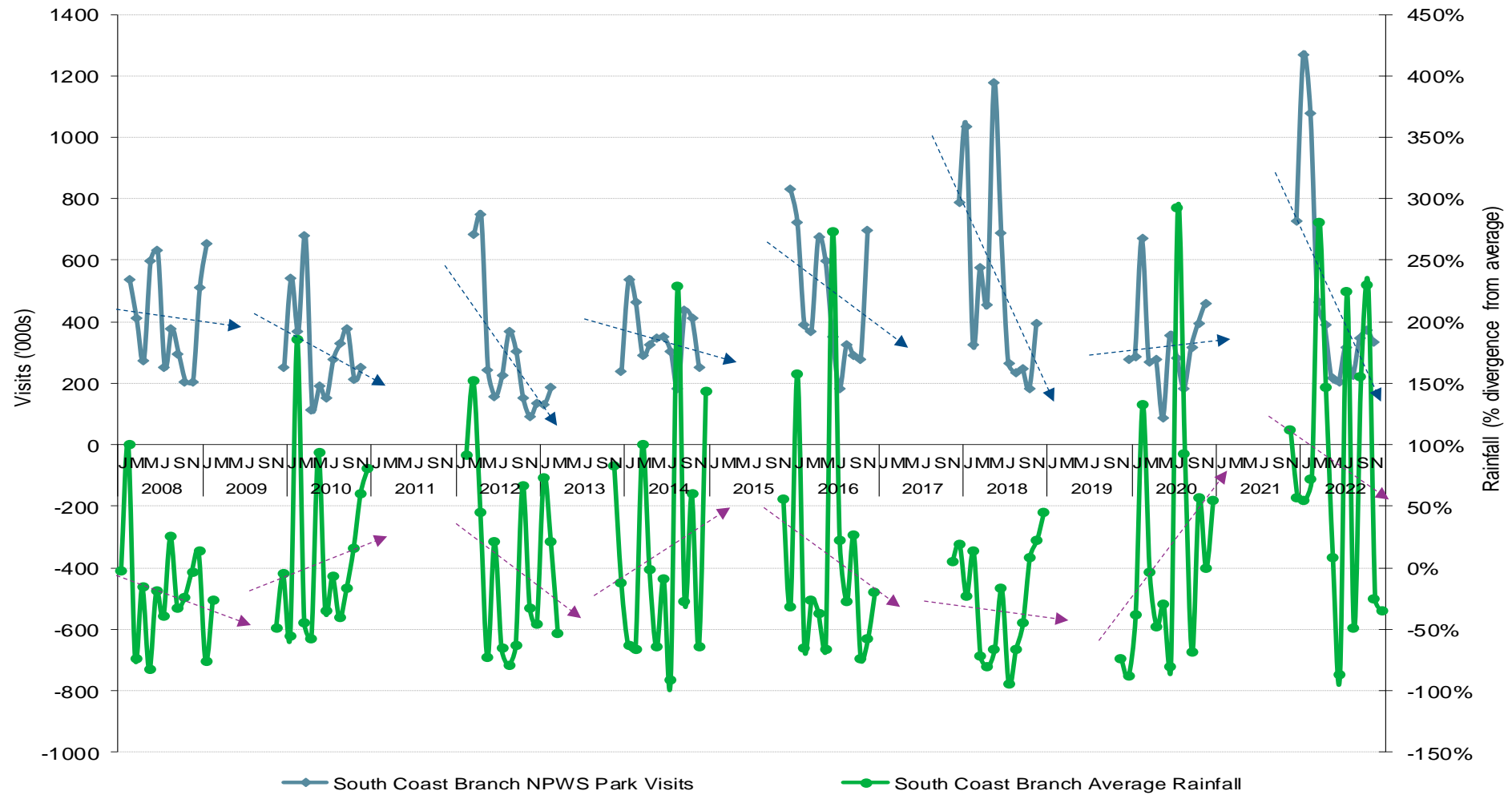
Chart 56: Monthly NPWS Park Visitation versus Monthly Rainfall - Blue Mountains Branch



Source: Bureau of Meteorology – Climate data online 2008-2022 – Monthly Rainfall = Average of 6 weather stations across the Blue Mountains Branch geographic region.

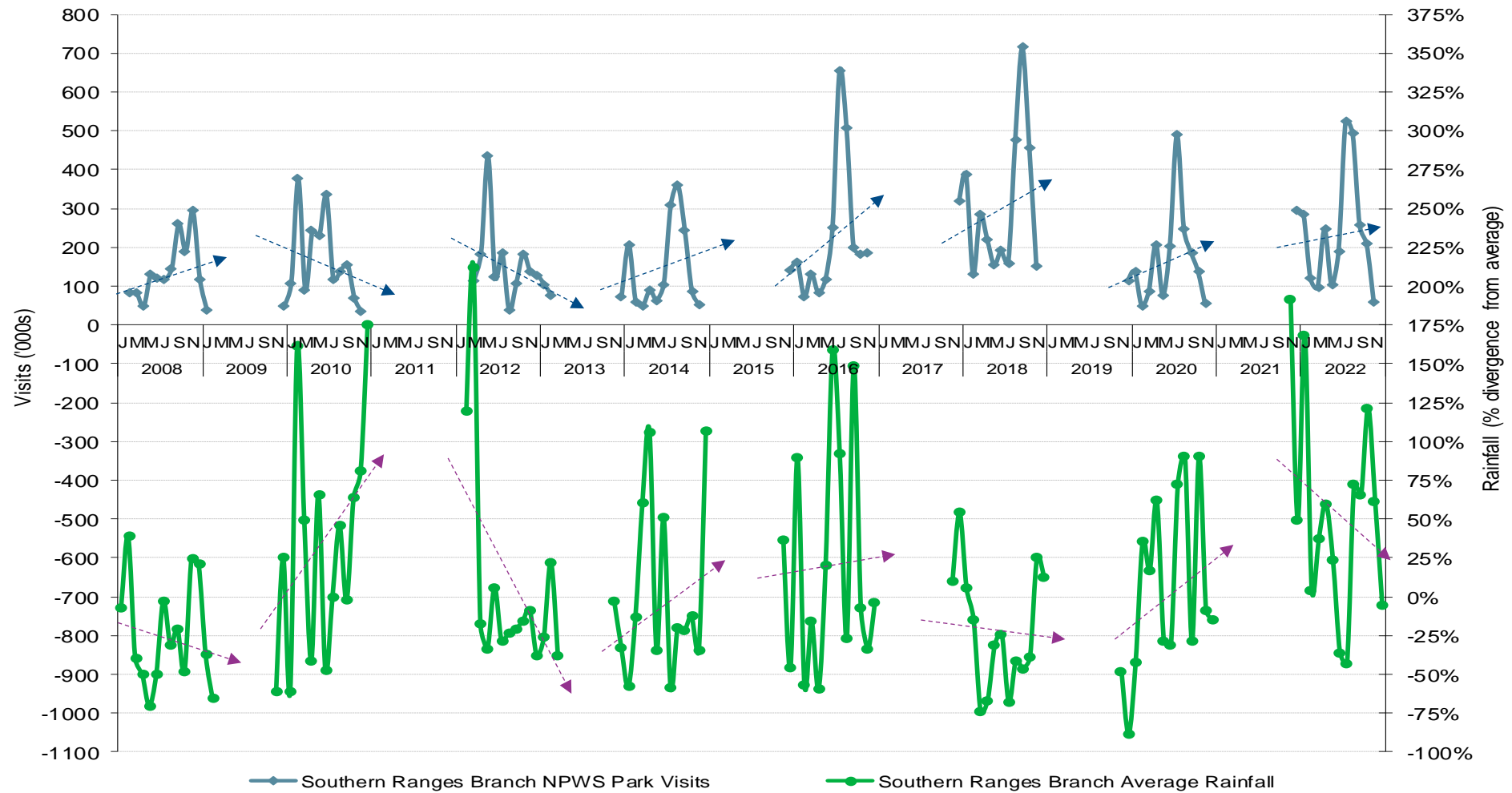


Chart 57: Monthly NPWS Park Visitation versus Monthly Rainfall - South Coast Branch



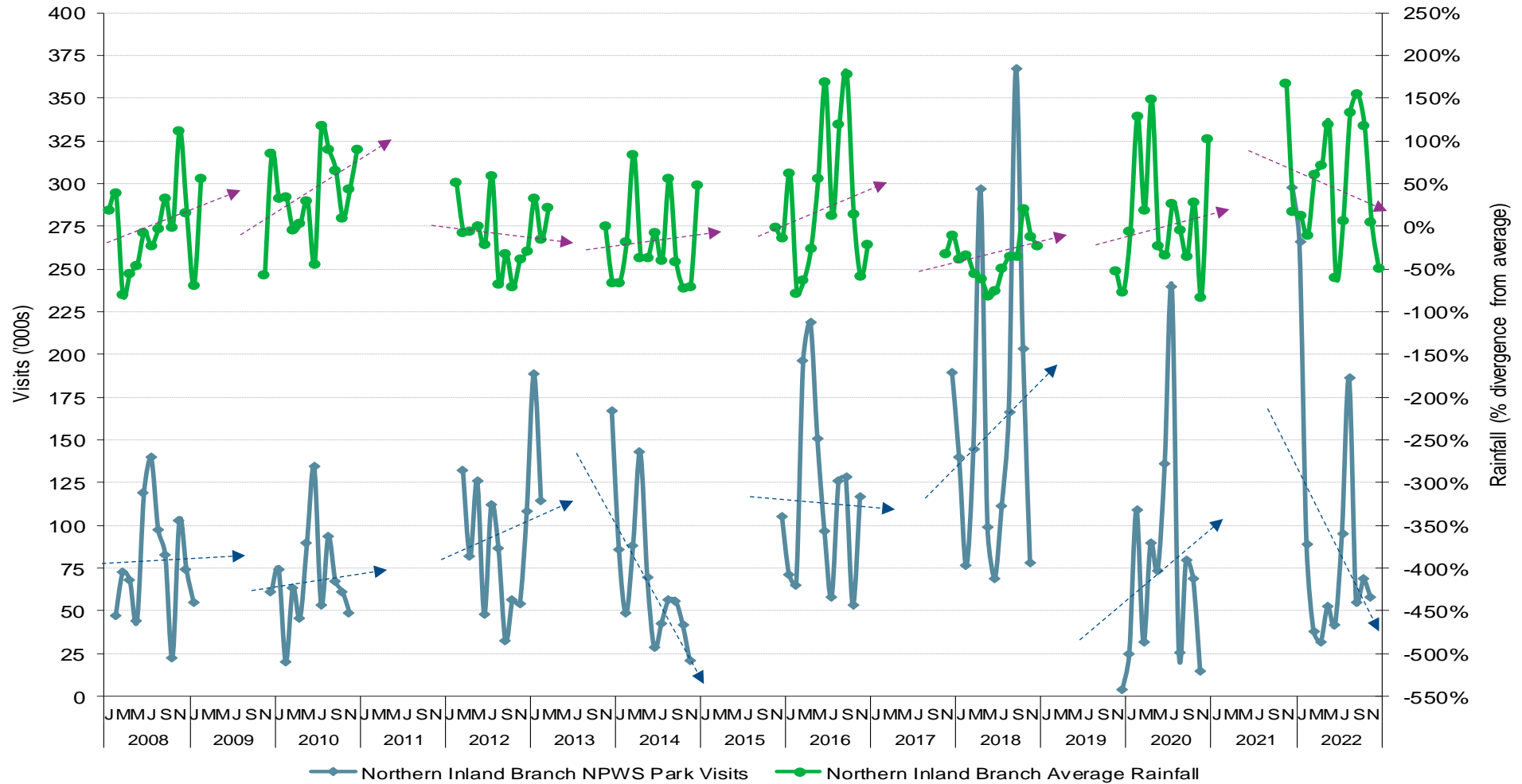
Source: Bureau of Meteorology – Climate data online 2008-2022 – Monthly Rainfall = Average of 7 weather stations across the South Coast Branch geographic region.

Chart 58: Monthly NPWS Park Visitation versus Monthly Rainfall - Southern Ranges Branch



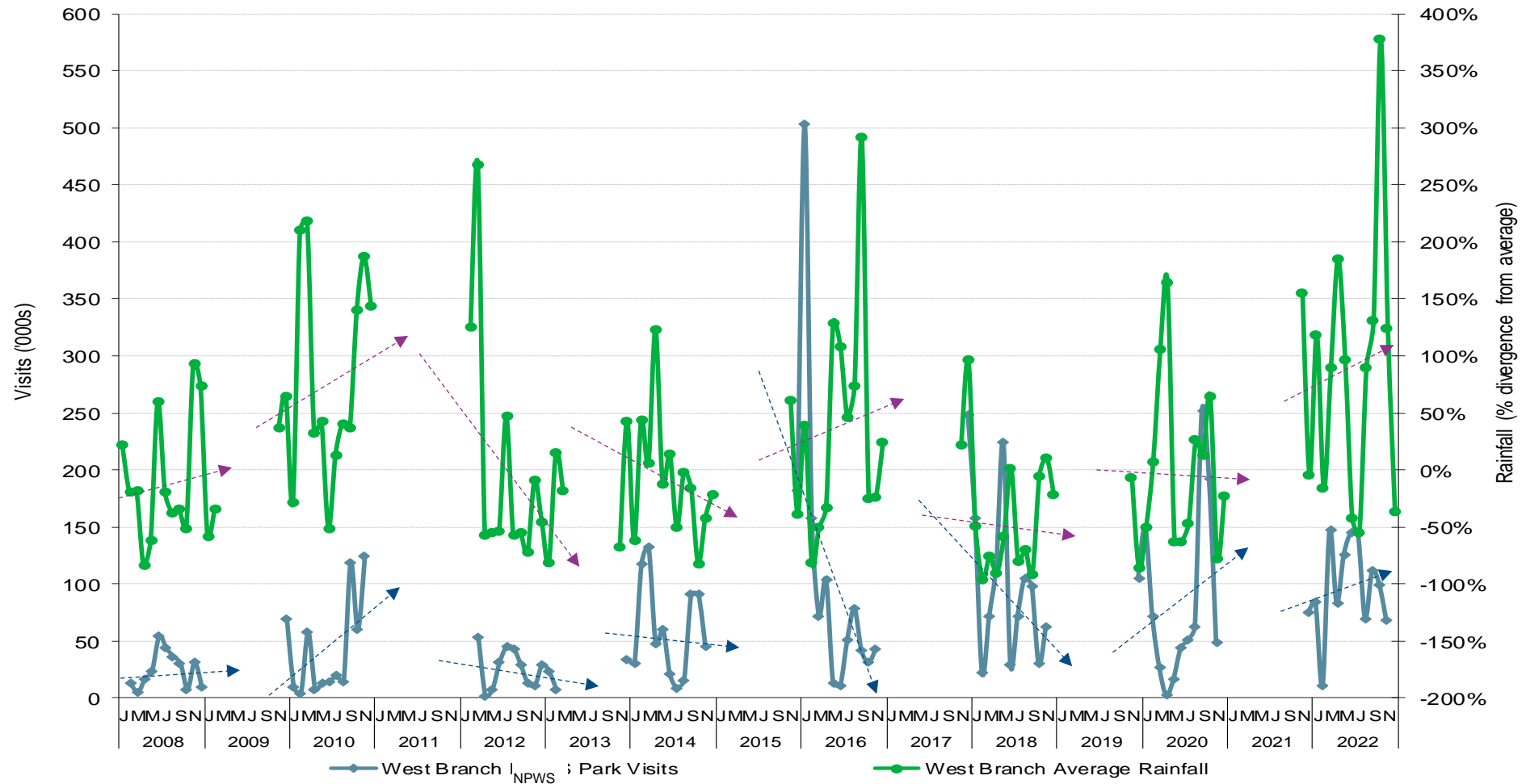
Source: Bureau of Meteorology – Climate data online 2008-2022 – Monthly Rainfall = Average of 6 weather stations across the Southern Ranges Branch geographic region.

Chart 59: Monthly NPWS Park Visitation versus Monthly Rainfall - Northern Inland Branch



Source: Bureau of Meteorology – Climate data online 2008-2022 – Monthly Rainfall = Average of 8 weather stations across the Northern Inland Branch geographic region.

Chart 60: Monthly NPWS Park Visitation versus Monthly Rainfall - West Branch



Source: Bureau of Meteorology – Climate data online 2008-2022 – 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)
2022	Very wet year across all seasons, with major flooding	High visitation in summer, trending down to winter, but a little better in spring

Source: Bureau of Meteorology – Climate Summaries for NSW.

Table 21 and Chart 61 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 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.

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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.

In 2020 weather conditions were unfavourable for visiting NPWS parks across the entire year. It was wet all year, with the Northern Rivers experiencing the wettest summer on record and significant flooding. Yet visitation to NPWS parks was very high (even in the North Coast Branch). Autumn was the seventh wettest on record, with many parts of Sydney and the Illawarra experiencing their wettest ever autumn. The wet weather impacted on sites from the North Coast to the Illawarra. As such, NPWS visitation was very low (though not as low as in 2020 due to COVID restrictions). Winter was also wet, particularly on the Central Coast, followed by the wettest spring on record. As a result NPWS visits were lower than had been seen since 2014.

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 temperatures, some flooding	Low	Mostly unfavourable conditions - low visits expected
Winter 2010	Cold, wet winter	Below average	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	Below average	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 drier & 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

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

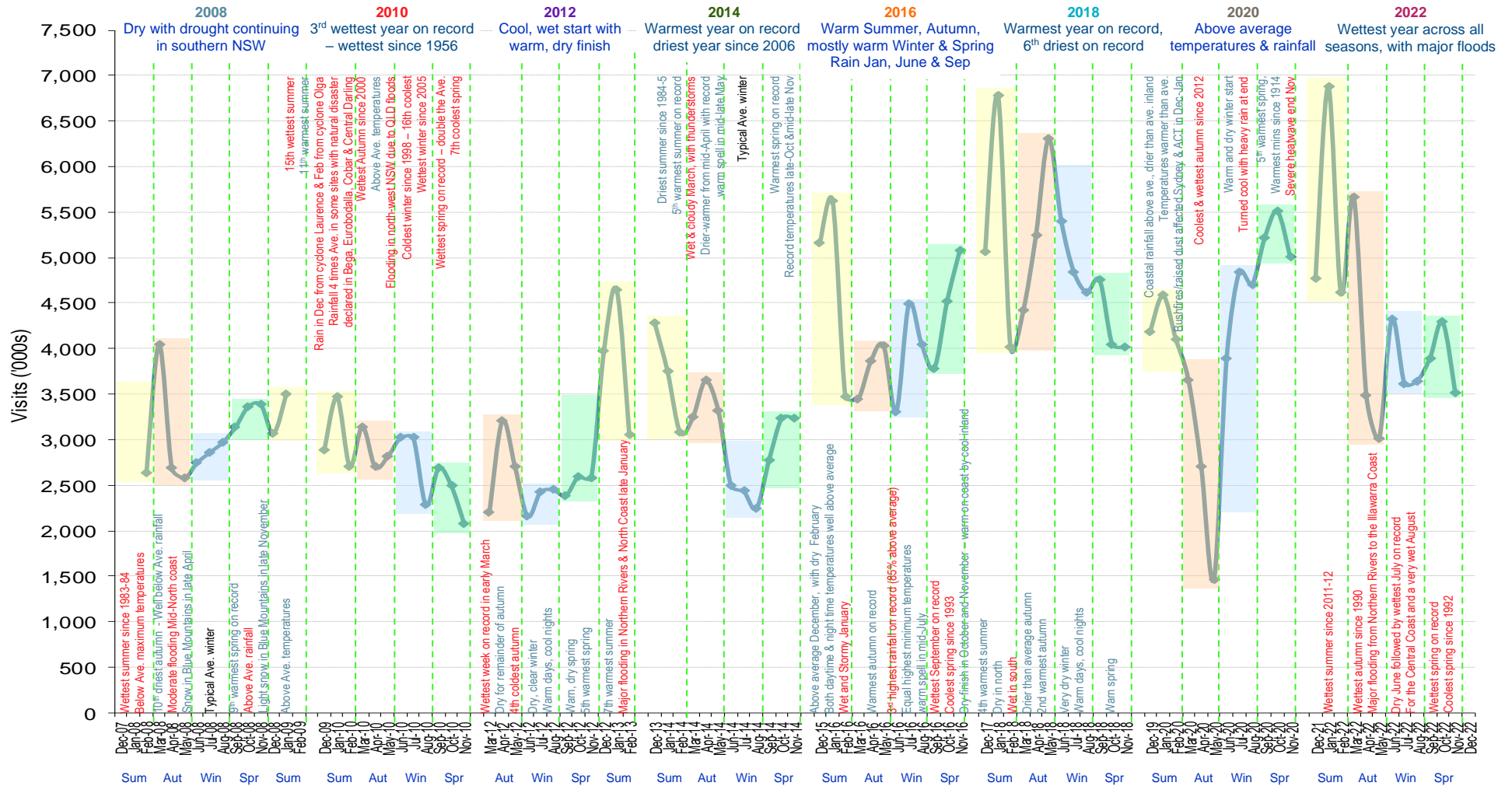
**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

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

Season	Weather Summary	Visitation	Comment
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
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
Summer 2021-22	Wettest summer since 2011-12.	High	Favourable conditions early in the summer for visits
Autumn 2022	Wettest autumn since 1990, with major flooding from Northern Rivers to Illawarra coast	Moderate-High	No rationale for higher than average visits
Winter 2022	Dry June followed by wettest July on record for Central Coast NSW & a very wet August	Below average	Conditions unfavourable for high visits
Spring 2022	Wettest spring on record & coolest since 1992	Average	Cool conditions favourable for visitation, offset by high rainfall

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

Chart 61: 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 Southeast 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 2022

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=	n=	n=	n=	n=	n=	n=	n=	n=
	15,623	678	1,162	1,803	4,037	584	1,156	1,781	4,422
<b>Sydney</b>									
<b>uc</b>	3,258	157	274	393	779	129	278	390	858
<b>uc%</b>	21%	23%	24%	22%	19%	22%	24%	22%	19%
<b>wc%</b>	28%	29%	30%	30%	26%	28%	30%	29%	26%
<b>Remainder NSW</b>									
<b>uc</b>	2,604	86	155	243	792	74	147	242	865
<b>uc%</b>	17%	13%	13%	13%	20%	13%	13%	14%	20%
<b>wc%</b>	14%	13%	11%	12%	17%	13%	11%	13%	17%
<b>ACT</b>									
<b>uc</b>	1,952	104	164	270	416	83	164	266	485
<b>uc%</b>	13%	15%	14%	15%	10%	14%	14%	15%	11%
<b>wc%</b>	2%	2%	2%	2%	2%	2%	2%	2%	2%
<b>Melbourne</b>									
<b>uc</b>	2,602	118	221	330	619	107	216	307	687
<b>uc%</b>	17%	17%	19%	18%	15%	18%	19%	28%	16%
<b>wc%</b>	27%	27%	30%	28%	24%	27%	29%	28%	25%
<b>Remainder VIC</b>									
<b>uc</b>	1,304	50	72	113	412	39	68	121	429
<b>uc%</b>	8%	7%	6%	6%	10%	7%	6%	7%	10%
<b>wc%</b>	8%	7%	6%	7%	10%	7%	6%	7%	9%
<b>Brisbane</b>									
<b>uc</b>	1,952	86	156	258	465	89	159	247	492
<b>uc%</b>	12%	13%	13%	14%	12%	15%	14%	14%	11%
<b>wc%</b>	13%	14%	14%	14%	12%	15%	14%	14%	12%
<b>Remainder Southern &amp; Southeast QLD</b>									
<b>uc</b>	1,951	77	120	196	554	63	124	211	606
<b>uc%</b>	12%	11%	10%	11%	14%	11%	11%	12%	14%
<b>wc%</b>	8%	8%	7%	7%	9%	8%	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 2022; Base: n=15,623

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

## **2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

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, 53% in 2020 and 57% in 2022.

Table 23 shows that people from mobile only households in 2022 represent 62% the population and 47% of the unweighted survey sample. 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 2022 than from 2012 to 2014 in order to reflect their population contribution. This means that the sample was more representative by phone status in 2022 than from 2012 to 2014.

People from households with both mobiles and landlines were weighted down, as they were over-represented in the sample (47% in the sample c.f. 37% in the population in 2022). 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 2022 (3% and 1% 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 for future surveys. 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 frame 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 of RDD mobile numbers and regionalised mobile numbers for the future NPV surveys.

Table 23: Phone Status by Region—All Respondents 2012-2022

Phone Status by Region	Mobiles & Landlines in the Household						Mobiles Only in the Household						Landlines Only in the Household					
	2012 n=	2014 n=	2016 n=	2018 n=	2020 n=	2022 n=	2012 n=	2014 n=	2016 n=	2018 n=	2020 n=	2020 n=	2012 n=	2014 n=	2016 n=	2018 n=	2020 n=	2020 n=
uh%	85%	84%	74%	68%	57%	47%	7%	9%	22%	29%	39%	50%	8%	7%	4%	3%	4%	3%
wh%	74%	69%	70%	64%	40%	37%	18%	24%	26%	33%	57%	62%	9%	7%	4%	3%	3%	1%
Sydney																		
uc	2,756	2,724	2,358	2,450	1,765	1,509	275	350	822	943	1,396	1,706	227	175	79	68	95	43
uh%	85%	84%	72%	69%	54%	46%	8%	11%	25%	59%	43%	52%	7%	5%	2%	2%	3%	1%
wh%	74%	71%	71%	67%	44%	39%	19%	23%	26%	30%	54%	60%	8%	7%	3%	3%	2%	1%
Remainder NSW																		
uc	2,176	2,140	1,906	1,723	1,527	1,352	177	229	582	765	977	1,153	262	240	120	124	106	99
uh%	83%	82%	73%	66%	59%	52%	7%	9%	22%	29%	37%	44%	10%	9%	5%	5%	4%	4%
wh%	71%	66%	69%	65%	44%	41%	17%	24%	26%	29%	52%	57%	12%	10%	6%	7%	4%	2%
ACT																		
uc	1,767	1,804	1,655	1,553	1,320	1,102	34	47	222	323	543	758	155	117	83	75	92	92
uh%	90%	92%	84%	80%	68%	56%	2%	2%	11%	17%	28%	39%	8%	6%	4%	4%	5%	5%
wh%	78%	78%	64%	62%	43%	31%	15%	16%	33%	37%	55%	68%	8%	6%	2%	1%	2%	1%
Melbourne																		
uc	2,161	2,131	1,810	1,597	1,335	1,080	259	335	757	990	1,181	1,505	184	141	45	22	88	17
uh%	83%	82%	69%	61%	51%	42%	10%	13%	29%	38%	45%	58%	7%	5%	2%	1%	3%	1%
wh%	75%	71%	72%	69%	36%	36%	18%	24%	25%	29%	61%	63%	7%	5%	3%	2%	2%	1%
Remainder VIC																		
uc	1,085	1,022	956	831	796	598	89	189	308	445	425	668	129	96	43	29	81	38
uh%	83%	78%	73%	64%	61%	46%	7%	14%	24%	34%	33%	51%	10%	7%	3%	2%	6%	3%
wh%	74%	67%	72%	58%	39%	36%	16%	25%	22%	38%	58%	62%	11%	8%	5%	4%	3%	1%
Brisbane																		
uc	1,614	1,524	1,420	1,390	1,058	799	121	161	463	465	816	1,131	140	130	94	104	83	22
uh%	86%	84%	72%	41%	54%	41%	6%	9%	23%	24%	42%	58%	7%	7%	5%	5%	4%	1%
wh%	72%	66%	66%	55%	38%	33%	21%	28%	30%	42%	59%	66%	7%	6%	4%	3%	3%	1%
Remainder Southern QLD																		
uc	1,723	1,775	1,495	1,233	1,119	942	86	140	346	662	747	926	226	186	119	57	88	83
uh%	85%	84%	76%	63%	57%	48%	4%	7%	18%	34%	38%	47%	11%	9%	6%	3%	5%	4%
wh%	76%	67%	69%	56%	36%	31%	16%	26%	28%	40%	60%	67%	8%	7%	4%	4%	3%	1%

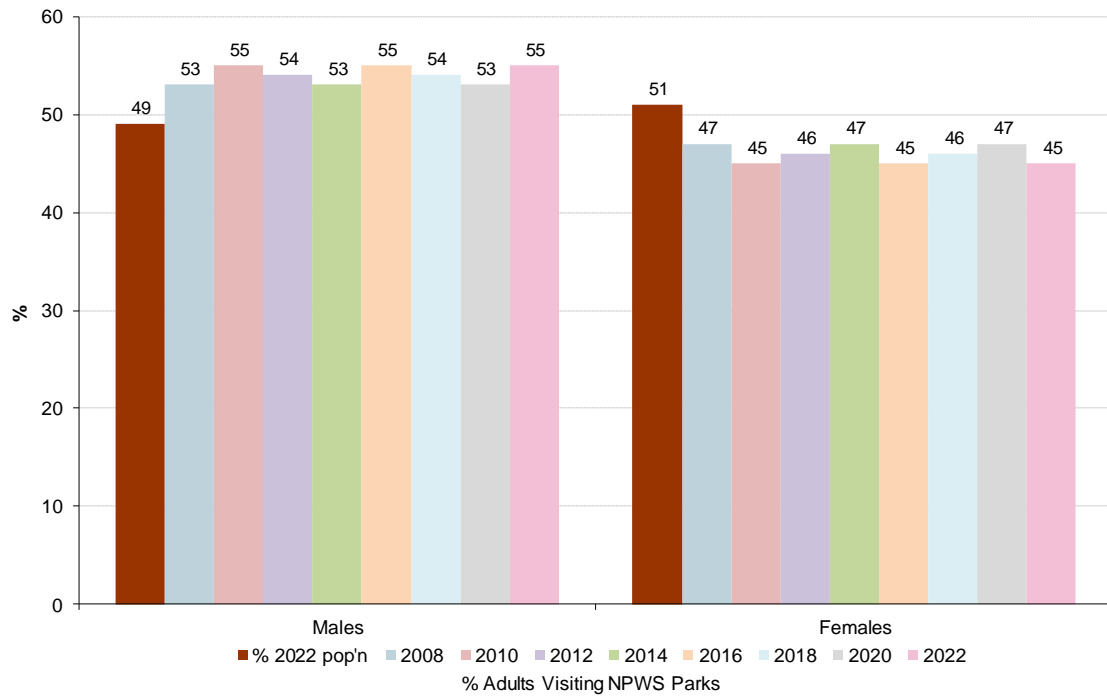
uc: Unweighted count (i.e. the number surveyed or asked a given question); uh%: Unweighted count percentage (percentage of the total sample the unweighted count represents in each row); wh%: Weighted percentage (the proportion of the total 18yrs+ population of the seven survey regions that call represents 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; 2022 n=15,623

## 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 62).

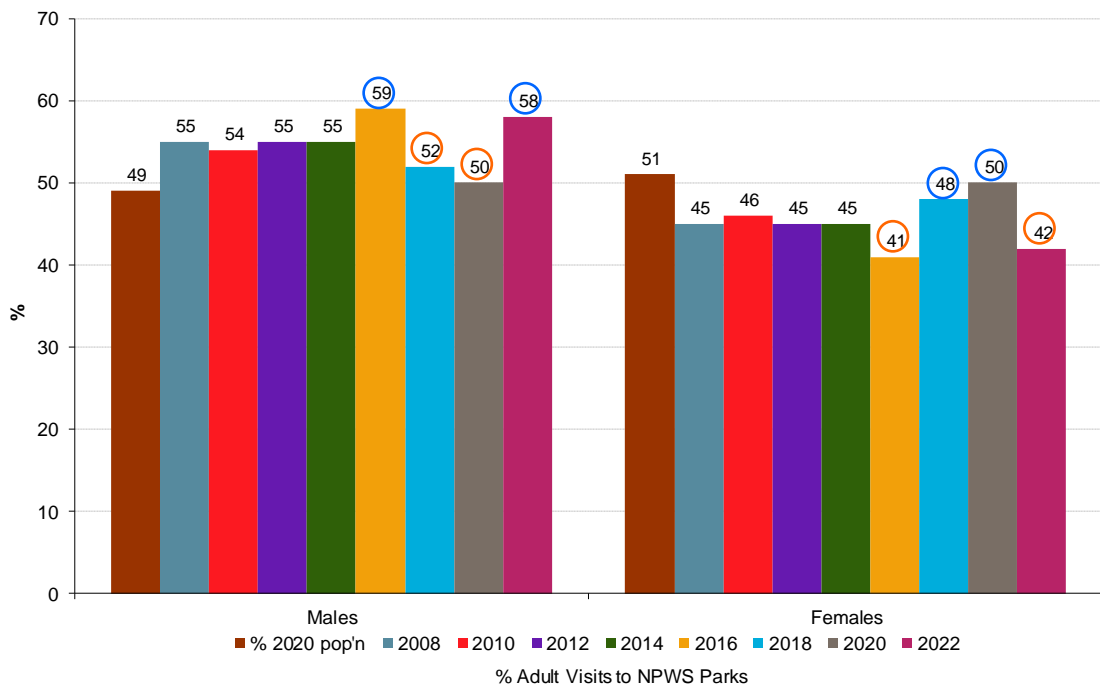
Visitation to NPWS parks has been slightly more over-represented by males than are represented amongst visitors (Chart 63), but this appeared to diminishing over time (2016-2020). However, in 2022 the proportion of male visits increased to 58%. Conversely visits from females increased from 41% in 2016 to 50% in 2020, but declined in to 42% in 2022.

Chart 62: Visitors to NPWS Parks by Sex



Source: NPWS Parks Visitor Surveys 2008 – 2022  
 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; 2022 n=1,382

Chart 63: Visitation to NPWS Parks by Sex



Source: NPWS Parks Visitor Surveys 2008 – 2022  
 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; n=1,382

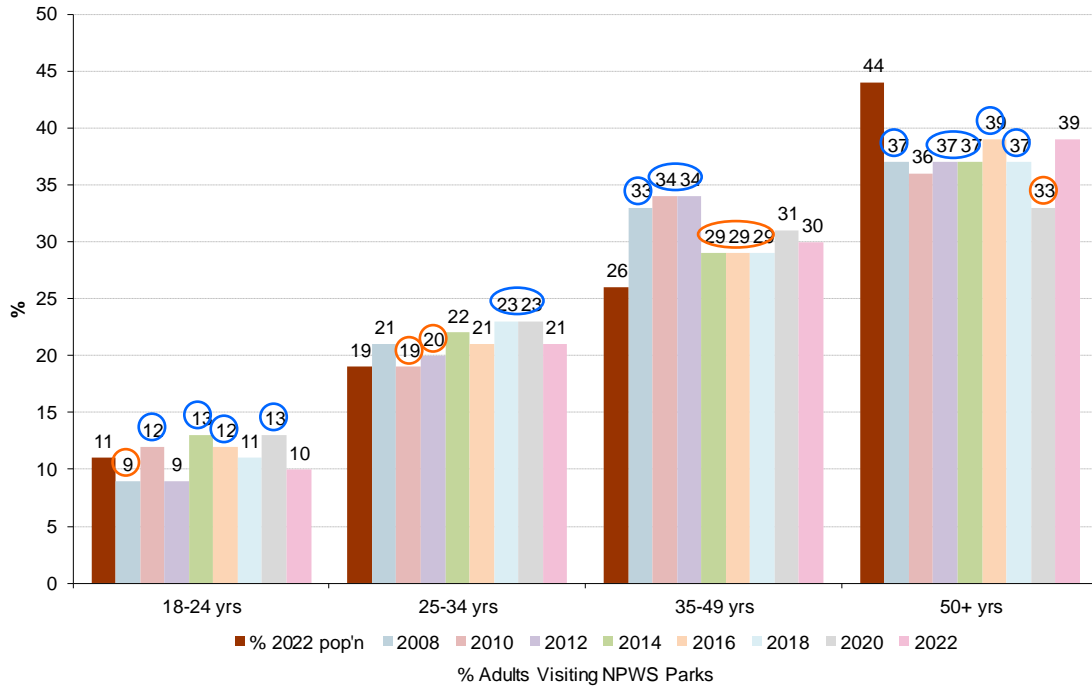
○ Significantly lower  
 ○ Significantly higher

A slightly younger age profile is evident from 2014 to 2020 compared with other years in terms of visitors to NPWS parks. However, in 2022 the proportion of younger people declined (10% - 18-24 years; 21% - 25-24 years), while the proportion aged 50 years and over increased (39%), showing

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

a slightly older age profile (Chart 64). In general, visits by age have been relatively stable over time. However there has been a growth in visits for 14-24 year olds from 2016 to 2022 (9% to 12%) (Chart 65).

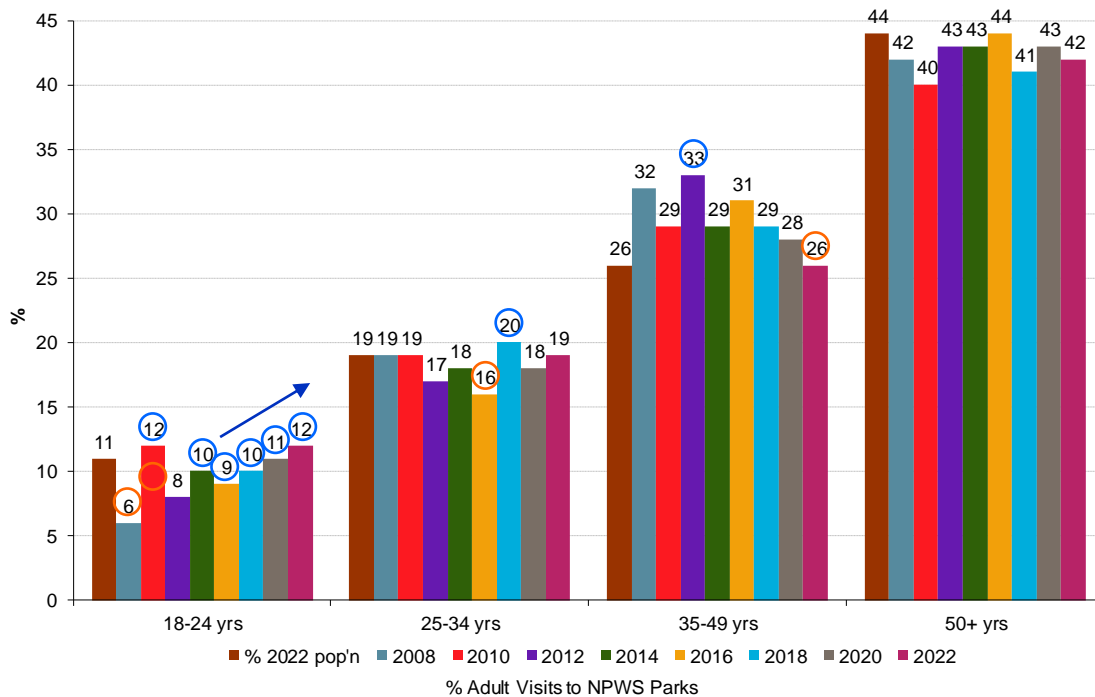
### Chart 64: Visitors to NPWS Parks by Age



Source: NPWS Parks Visitor Surveys 2008 – 2022  
 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; 2022 1,382

○ Significantly lower  
 ○ Significantly higher

### Chart 65: Visitation to NPWS Parks by Age



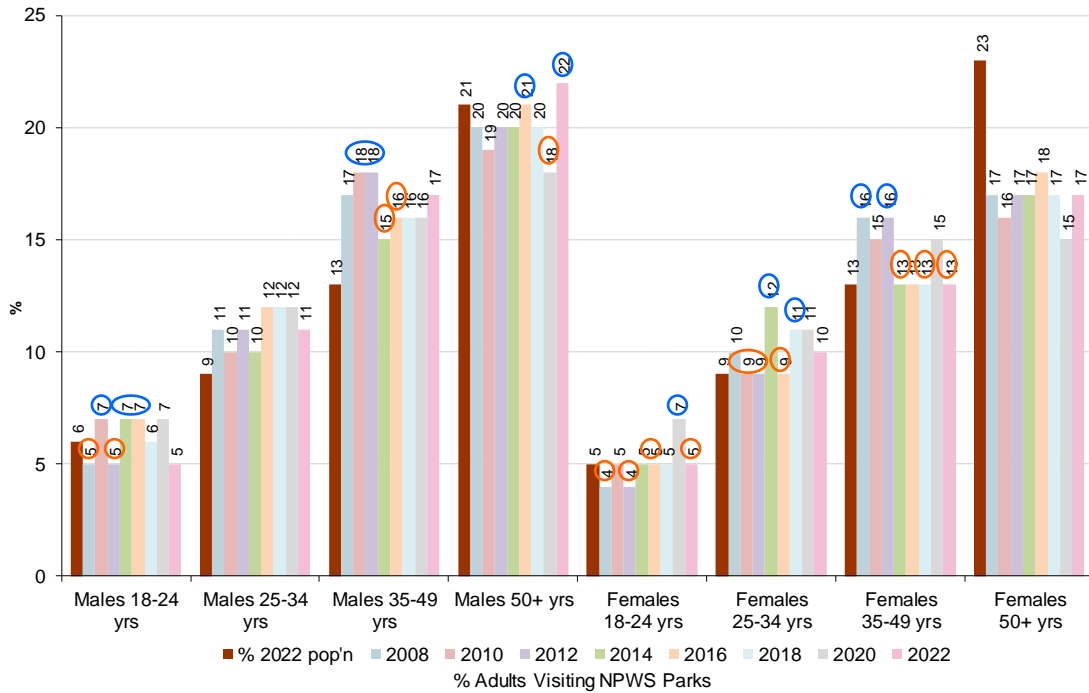
Source: NPWS Parks Visitor Surveys 2008 – 2022  
 Base: 2008 n=1,563; 2010 n=1,389; 2012 n=1,421; 2014 n=1,651; 2016 n=1,708; 2018 n=1,718; 2020 n=1,178; 2022 n=1,382

○ Significantly lower  
 ○ Significantly higher

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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 younger age groups across years, although the increase of those aged 50 years and over in 2022 can be primarily attributed to males (Chart 66). Conversely, increased visits for 18-24 year olds can be solely attributed to females (see Chart 67).

Chart 66: Visitors to NPWS Parks by Age by Sex

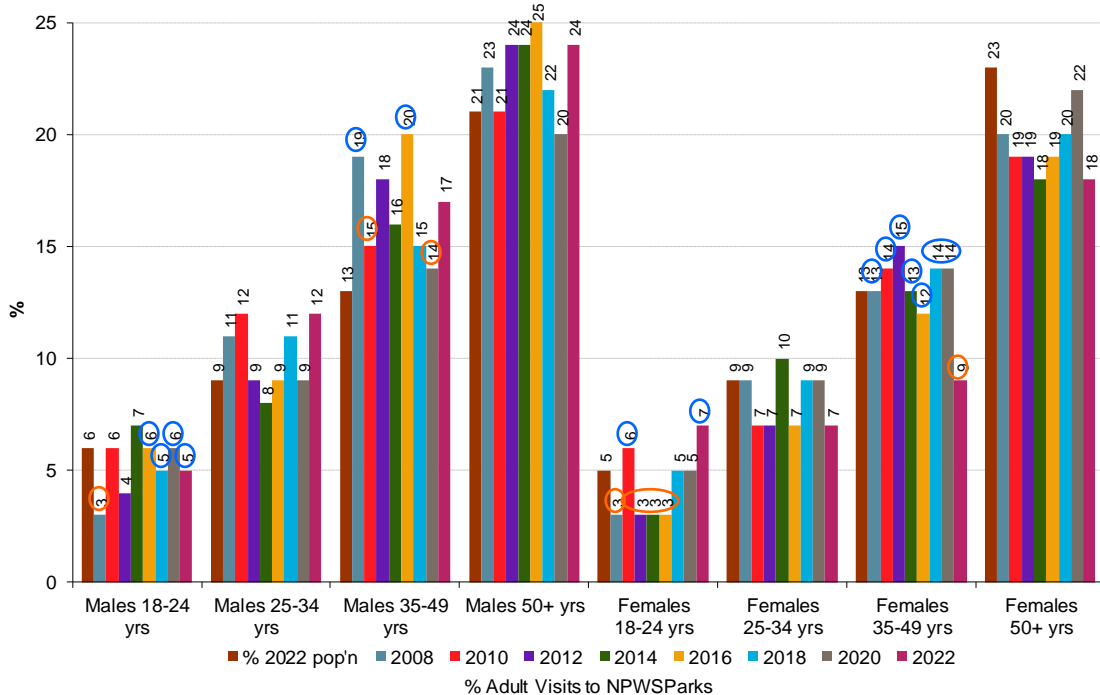


Source: NPWS Parks Visitor Surveys 2008 – 2022

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; 2022 n=1,382

○ Significantly lower  
○ Significantly higher

Chart 67: Visitation to NPWS Parks by Age by Sex



Source: NPWS Parks Visitor Surveys 2008 – 2022

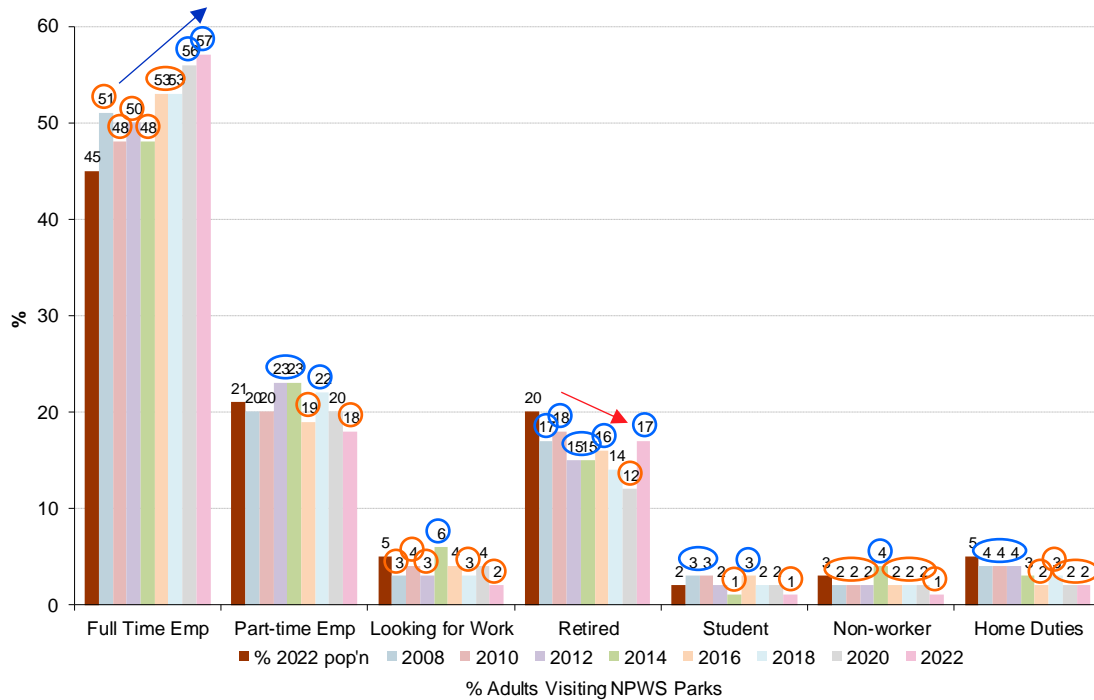
Base: 2008 n=1,563; 2010 n=1,389; 2012 n=1,421; 2014 n=1,651; 2016 n=1,708, 2018 n=1,718; 2020 n=1,178; 2022 n=1,382

○ Significantly lower  
○ Significantly higher

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

In 2022 the proportion of NPWS park visitors employed in full time work increased to its highest level (57% - Chart 76). Whilst the proportion of retired visitors has generally been declining since 2010, it rebounded in 2022 to 17%. Visits to NPWS Parks have generally been increasing over time, while visits from those in part-time employment has generally been declining (Chart 69).

Chart 68: Visitors to NPWS Parks by Work Status

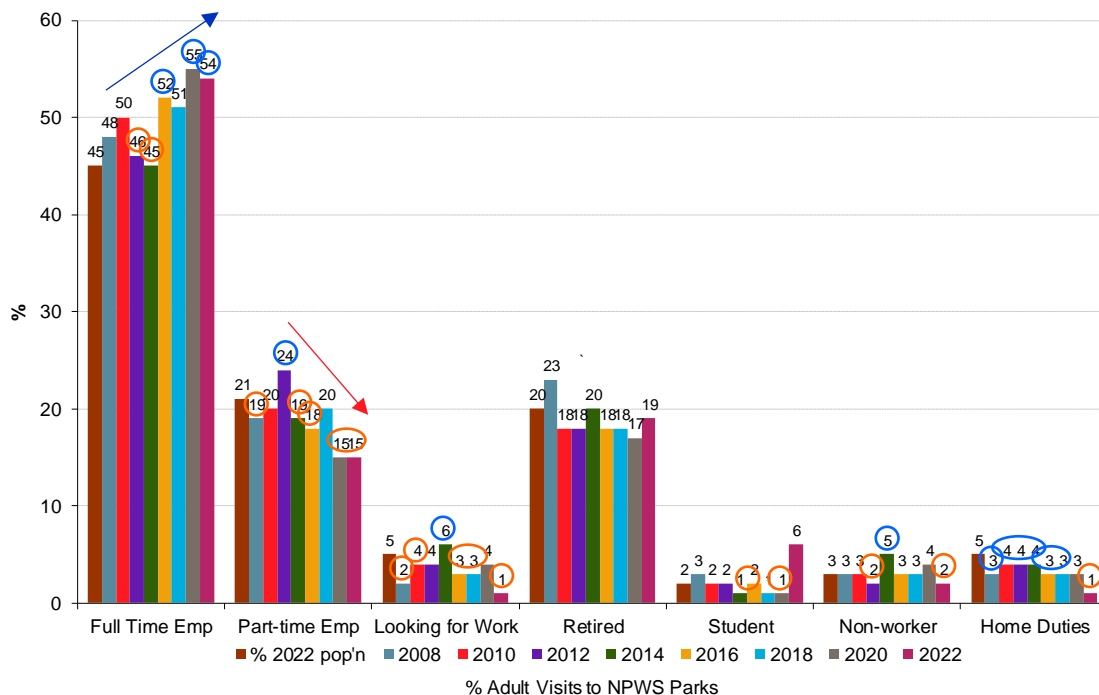


Source: NPWS Parks Visitor Surveys 2008 – 2022

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; 2022 n=1,382

○ Significantly lower  
○ Significantly higher

Chart 69: Visitation to NPWS Parks by Work Status



Source: NPWS Parks Visitor Surveys 2008 – 2022

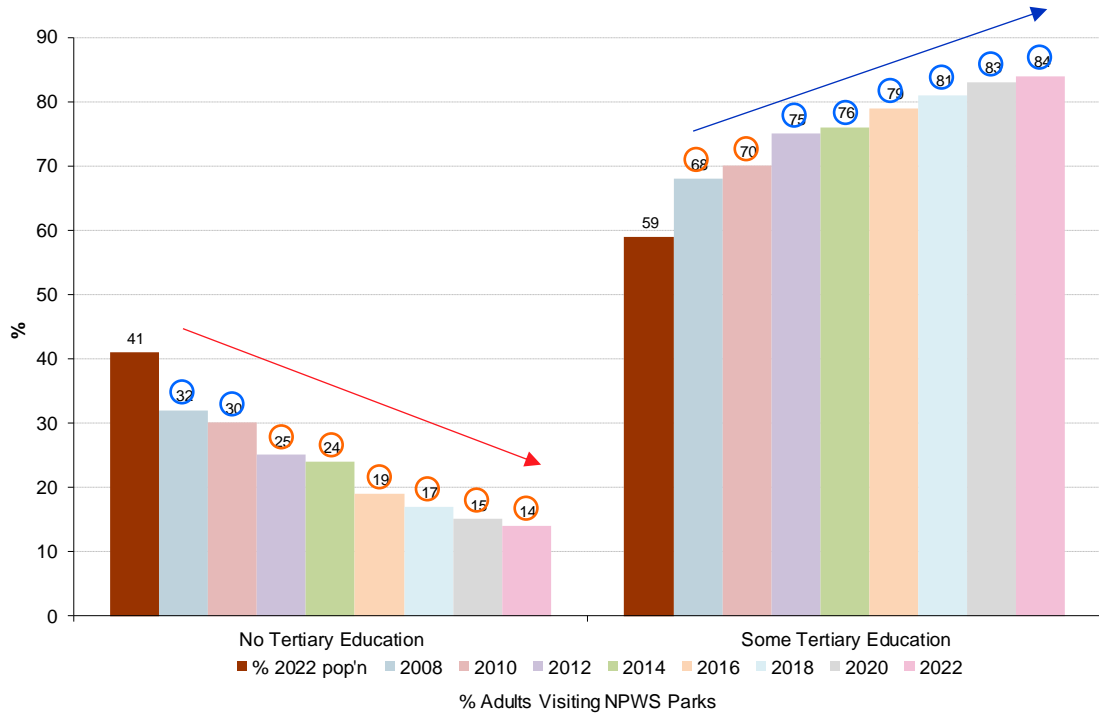
Base: 2008 n=1,563; 2010 n=1,389; 2012 n=1,421; 2014 n=1,651; 2016 n=1,708, 2018 n=1,718; 2020 n=1,178; 2022 n=1,382

○ Significantly lower  
○ Significantly higher

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

The proportion of people without any form of tertiary education who visit NPWS parks is declining over time (those with tertiary education is correspondingly increasing - Chart 70). While the general downward trend in visits for those without tertiary education is evident, it is starting to flatten out. Visits for those with tertiary education has flattened since 2018 (Chart 71).

### Chart 70: Visitors to NPWS Parks by Education Summary

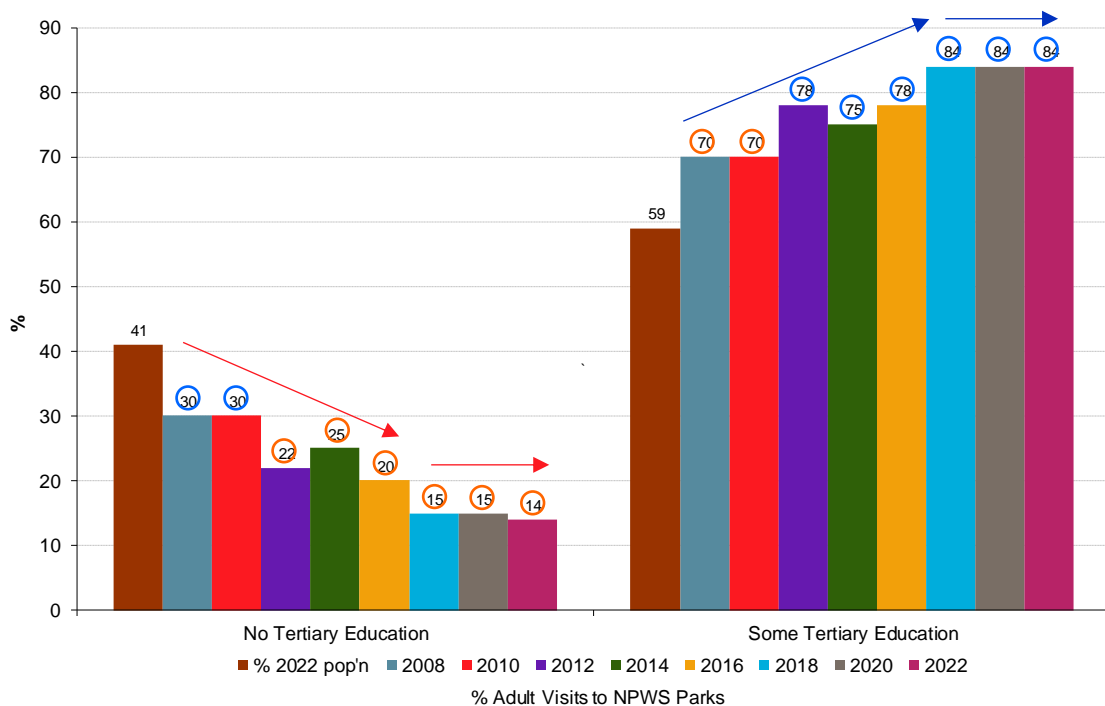


Source: NPWS Parks Visitor Surveys 2008 – 2022

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; 2022 n=1,382

○ Significantly lower  
○ Significantly higher

### Chart 71: Visitation to NPWS Parks by Education Summary



Source: NPWS Parks Visitor Surveys 2008 – 2022

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; 2022 n=1,382

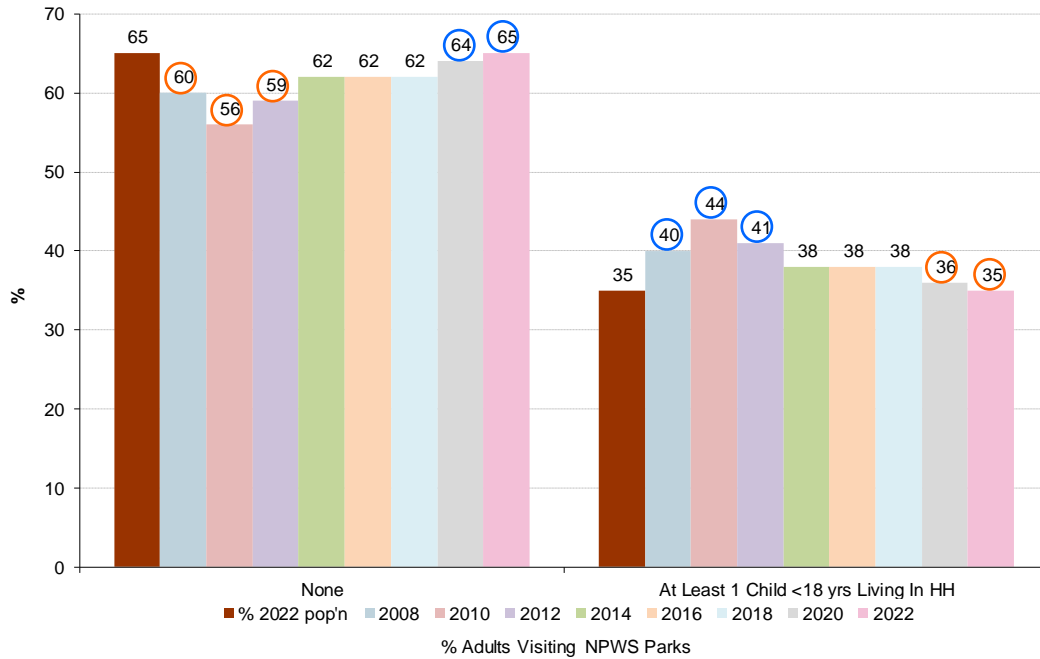
○ Significantly lower  
○ Significantly higher



## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

The proportion of NPWS park visitors with one or more children in the household declined to its lowest level in 2022 (35% - see Chart 72), with the proportion of visitors with no children increasing to its highest level (65%). These trends were replicated in relation to park visits, with just 30% of visits in 2022 coming from those with children and 70% coming from those without (Chart 73).

Chart 72: Visitors to NPWS Parks by Number of Children Under 18 Years in the Household

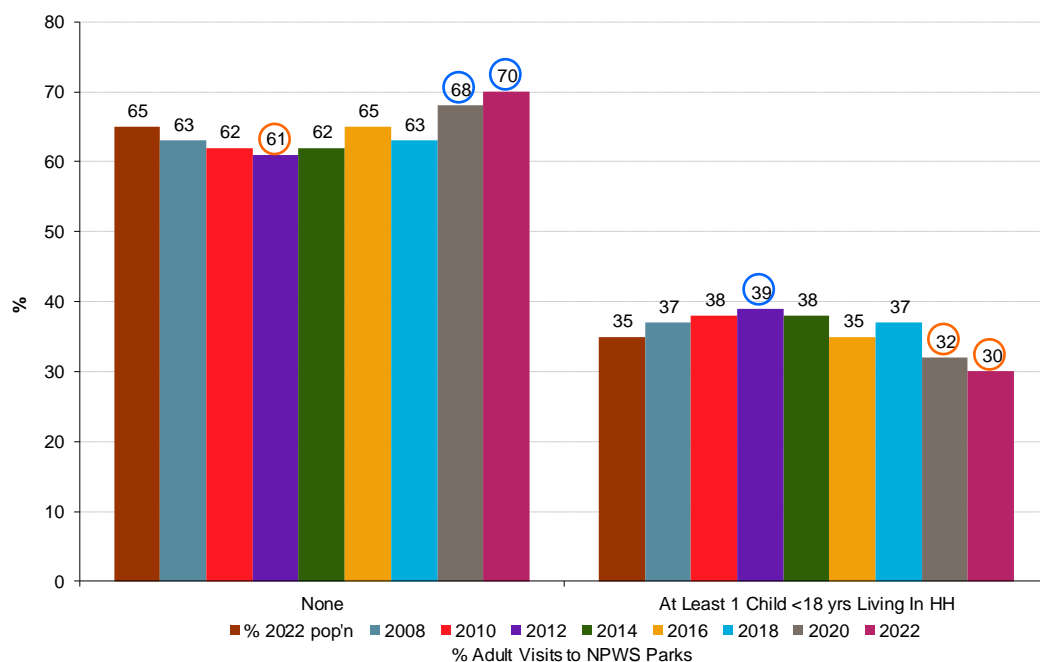


Source: NPWS Parks Visitor Surveys 2008 – 2022

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| 2022 n=1,382

○ Significantly lower  
○ Significantly higher

Chart 73: Visitation to NPWS Parks by Number of Children Under 18 Years in the Household



Source: NPWS Parks Visitor Surveys 2008 – 2022

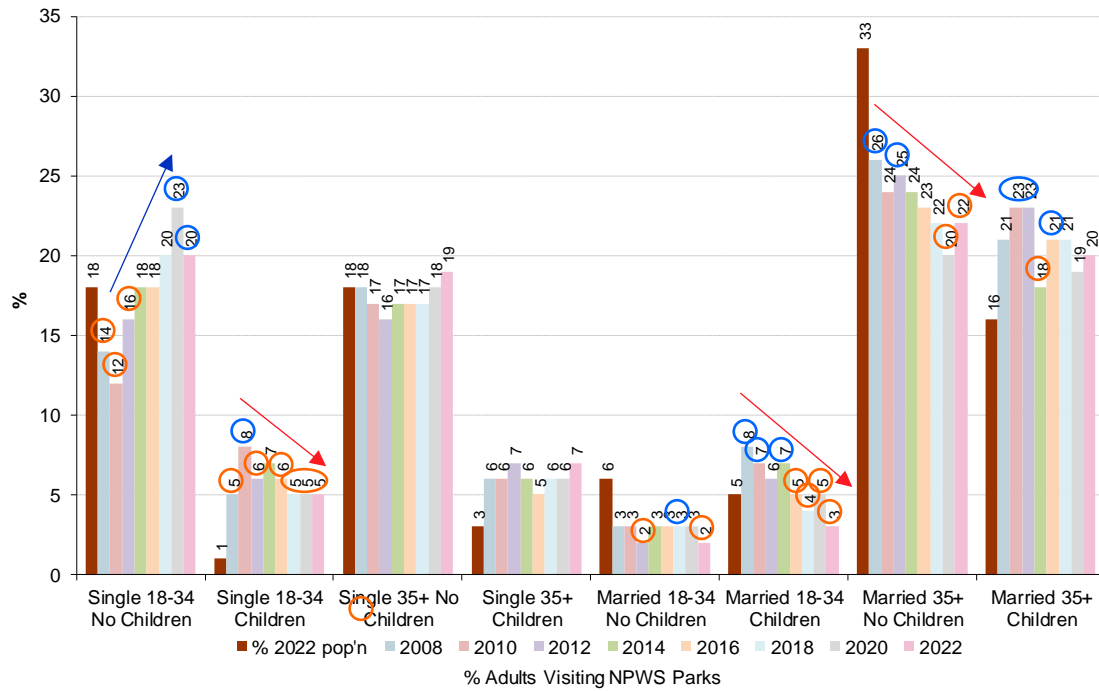
Base: 2008 n=1,563; 2010 n=1,389; 2012 n=1,421; 2014 n=1,651; 2016 n=1,708, 2018 n=1,718; 2020 n= 1,178| 2022 n=1,382

○ Significantly lower  
○ Significantly higher

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

There has been a general upward trend in the proportion of NPWS park visitors who are single, aged 18-34 with no children since 2010. However, proportions fell to 20% in this category in 2022 (Chart 74). Proportions of visitors are in decline for singles 18-34 with children, married 18-34 no children and married 35 year and over with no children.

**Chart 74: Visitors to NPWS Parks by Respondent Life-Cycle**



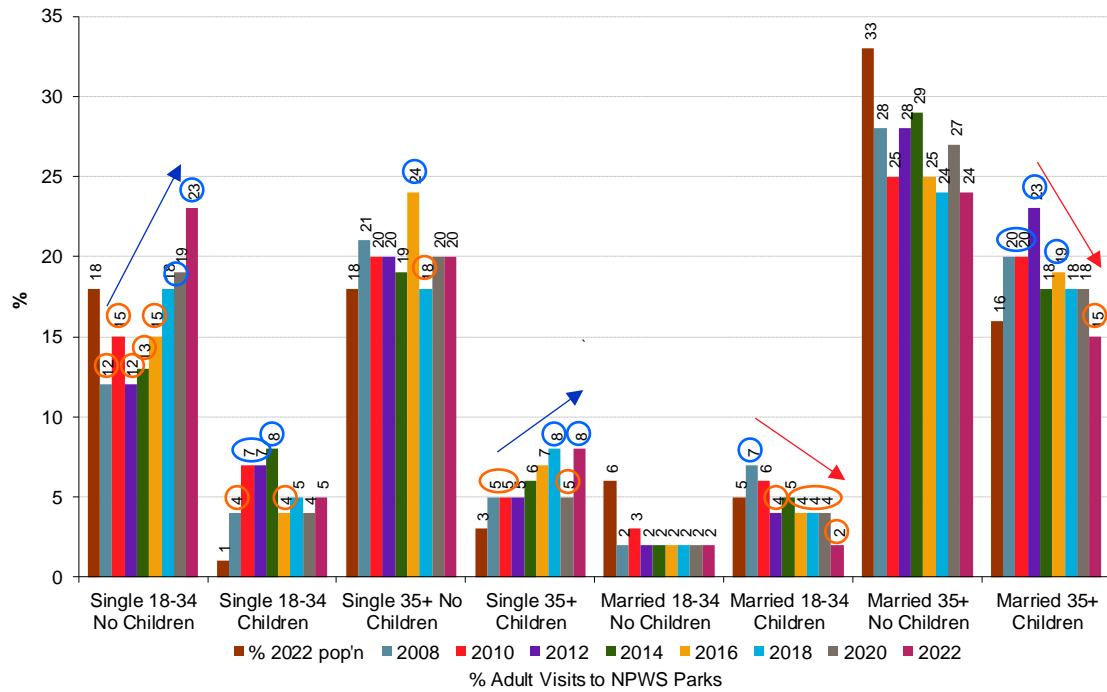
Source: NPWS Parks Visitor Surveys 2008 – 2022  
 Base: 2008 n=1,563; 2010 n=1,389; 2012 n=1,421; 2014 n=1,651; 2016 n=1,708, 2018 n=1,718; 2020 n= 1,178; 2022 n=1,382

○ Significantly lower  
 ○ Significantly higher

In relation to NPWS park visitation, the proportion of visits from singles aged 18-34 years with no children is at its highest level in 2022 (23% - Chart 75), even though the proportion of visitors in this category declined in 2022 (Chart 74) There has generally been an upward trend in visits in this category since 2008. There is also a slight upward trend in visits from singles 35+ with children.

However, visits from those married 18-34 with children and those married 35+ with children tend to be declining over time (the latter category since 2012).

Chart 75: Visitation to NPWS Parks by Respondent Life-Cycle



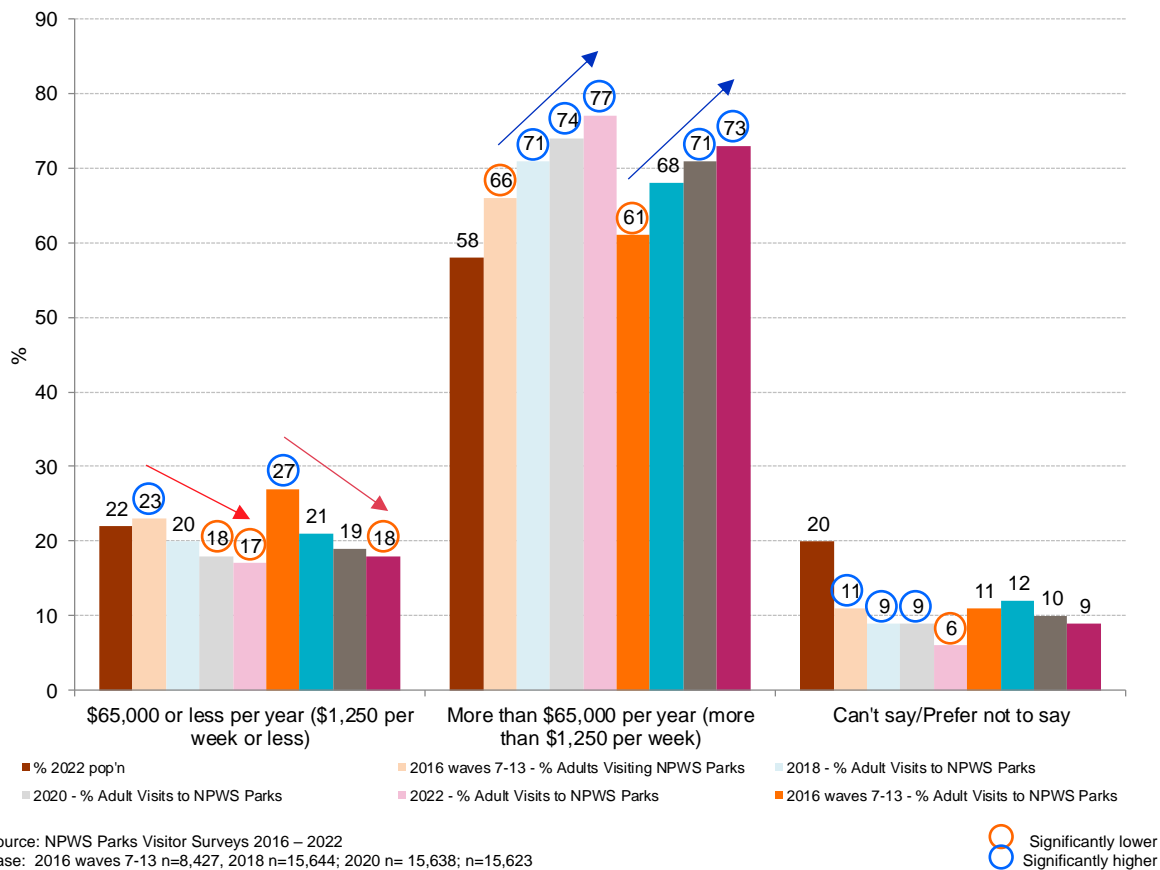
Source: NPWS Parks Visitor Surveys 2008 – 2022  
 Base: 2008 n=1,563; 2010 n=1,389; 2012 n=1,421; 2014 n=1,651; 2016 n=1,708, 2018 n=1,718; 2020 n= 1,178; 2022 n=1,382

○ 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 76).

The proportion of NPWS visitors earning \$65,000 or less per year has significantly declined since 2016 (from 23% to 17%, as has the proportion of visits for people earning this income (from 27% to 18% - see Chart 76). The proportion of visitors with household incomes of more than \$65,000 per year has increased significantly since 2016 (from 66% to 77%), as has the proportion of visits (from 61% to 73%).

Chart 76: Visitation to NPWS Parks by Household Income (Wave 7-13 2016 to 2020)

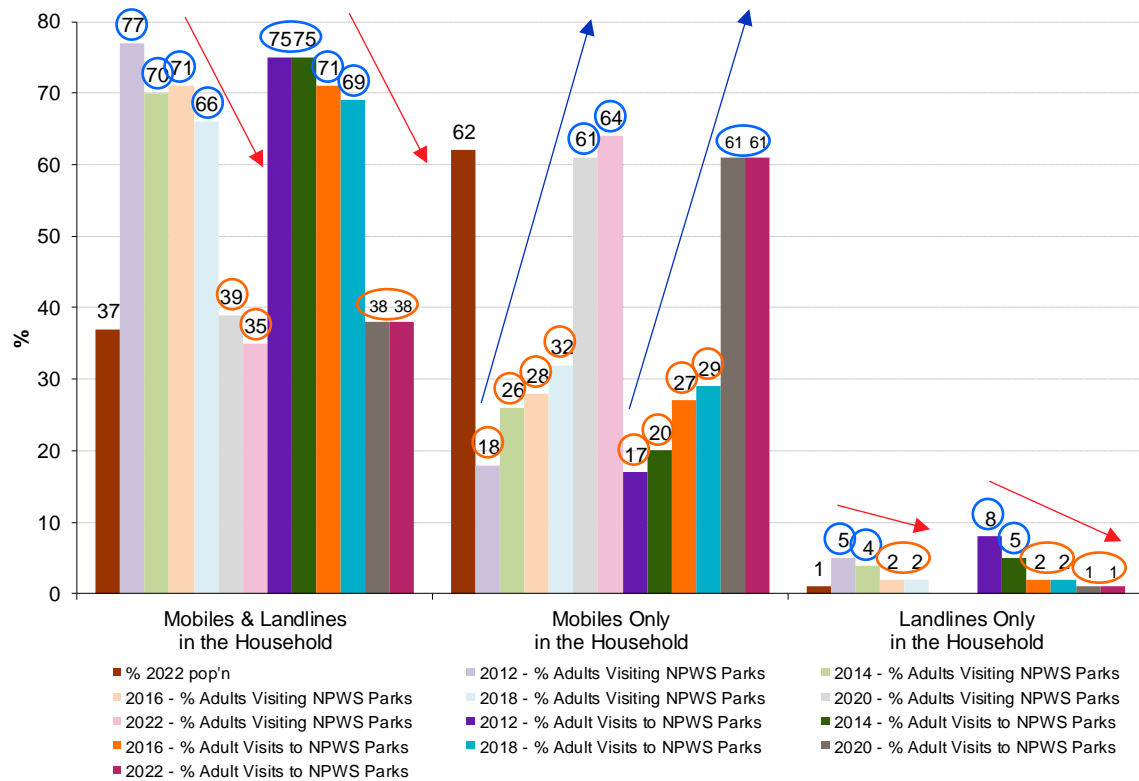


Analysis of phone status of the respondent could not be undertaken until 2016, as the questions used to define phone type(s) used were not added to the questionnaire until this time. The proportion of visitors going to NPWS parks from households with both landline and mobile phones has been declining over time (77% - 2-16 to 35% - 2022 - Chart 77). The same trend is evident for households that only have landline phones in the household (5% 2016 to 2% - 2022). In terms of visits the same trends are evident, with visits from those with both a mobile and a landline declining from 75% in 2016 to 38% in 2022 and visits from those with a landline only declining from 8% in 2016 to 1% in 2022

The proportion of visitors to NPWS parks from mobile only households is increasing over time, from 18% in 2016 to 64% in 2022. The proportion of visits from mobile only households exhibit the same trend, from 17% in 2016 to 61% in 2022.

These trends are in line with the general trend for home ownership in households over time in Australia.

Chart 77: Visitors and Visitation to NPWS Parks by Phone Status



Source: NPWS Parks Visitor Surveys 2012 – 2022  
 Base: 2012 n=1,421; 2014 n=1,651; 2016 n=1,708, 2018 n=1,718; 2020n= 1,178; 2022 n=1.382

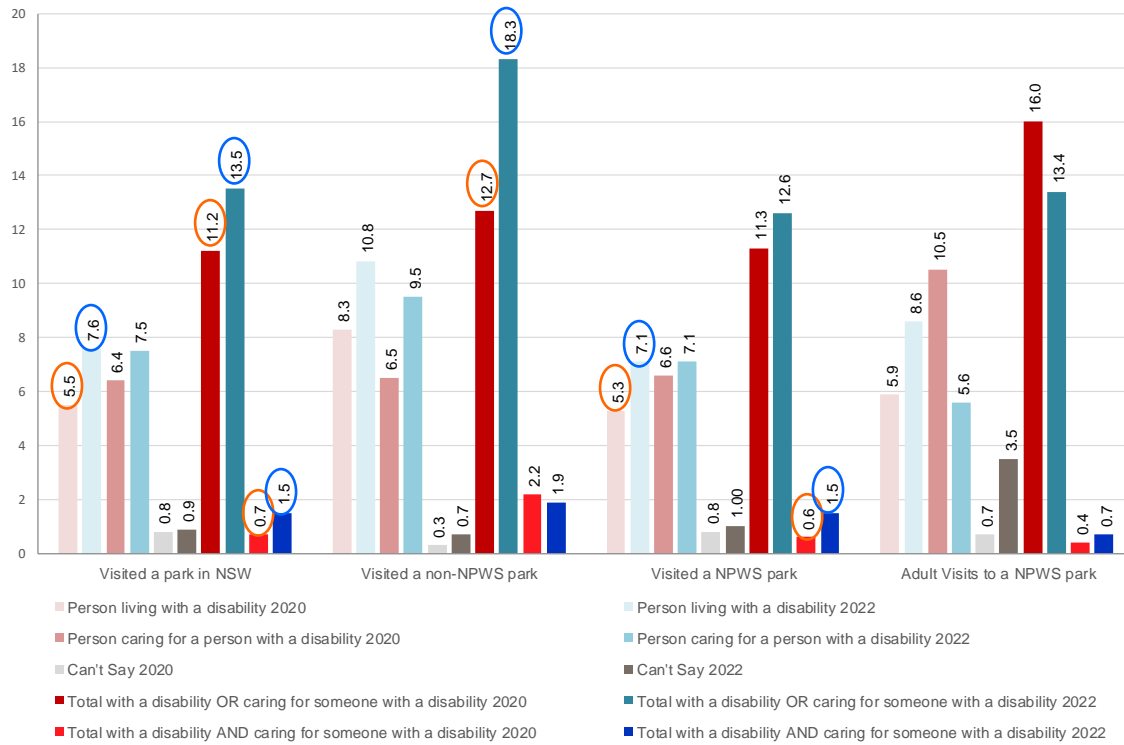
○ Significantly lower  
 ○ Significantly higher

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 in 2020. This increased to almost 8% in 2022. This significantly under-estimates the proportion of people with a disability in Australia, with Australian Bureau of Statistics data indicating that 18% of the 18 years and over population in 2018 had a disability (no more recent data has been made available as yet).

Over 6% of those visiting any type of park in NSW in 2020 claimed to be a person caring for a person with a disability, which increased to almost 8% in 2022 (Chart 78), while just under 1% had both a disability and cared for someone with a disability. Over 8% of those visiting a non-NPWS park claimed to have a disability in 2020, with this proportion increasing to almost 11% in 2022. This compares with 5% of those visiting an NPWS park in 2020 and 7% in 2022. This most likely indicates that non-NPWS parks, particularly local parks are more accessible to those with a disability.

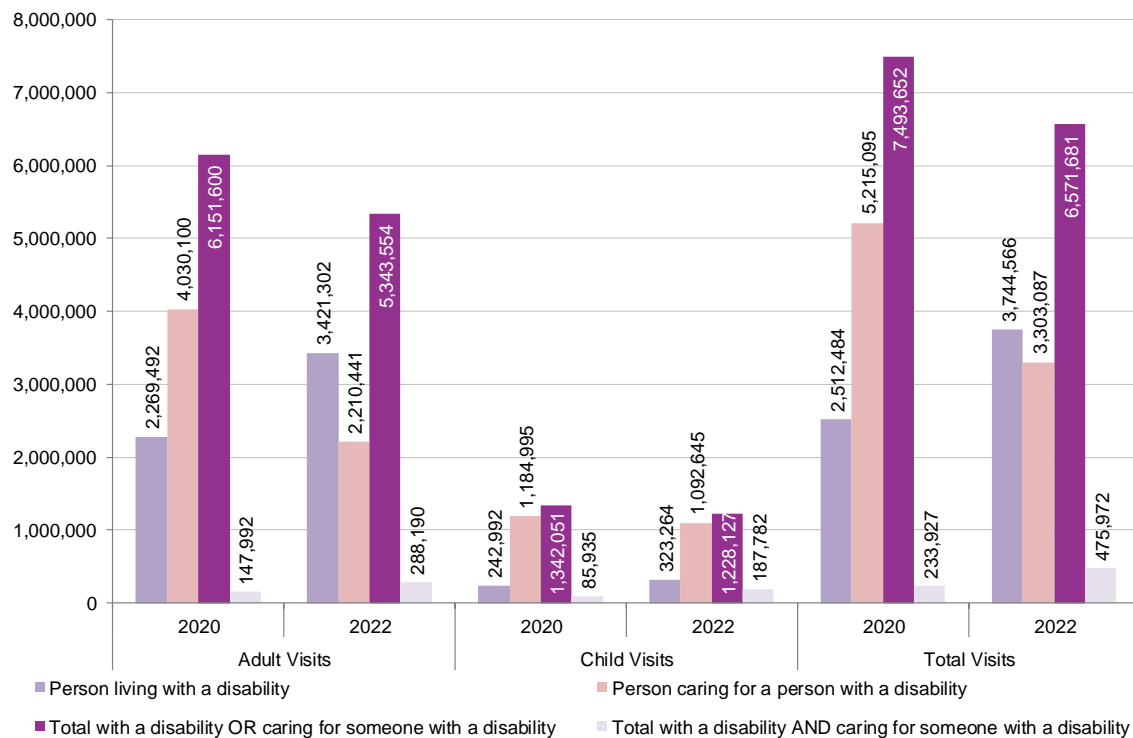
In terms of visits to NPWS parks in 2020, 2.5m visits were made from travel parties including a person with a disability, while 5.2m visits were made from travel parties which included a person who cares for a person with a disability (Chart 79). In 2022, visits with disabled people increased to 3.7m, but visits from carers declined to 3.3m. Therefore, the number of visits from disabled people or those caring for disabled people decreased from 7.5m in 2020 to 6.6m in 2022.

Chart 78: Visitors and Visitation to NPWS Parks by Disability Status 2020-2022



Source: NPWS Parks Visitor Survey 2020-2022  
 Base: Visited a park in NSW 2020 n=1,440, 2022 n=1,24 Visited a non-NPWS park 2020 n=354, 2022 n=365; Visited a NPSW park 2020 n=1,158; 2022n=1,382

Chart 79: Visits to NPWS Parks by Disability Status 2020-2022



Source: NPWS Parks Visitor Survey 2020- 2022  
 Base: Visited a NPSW park 2020 n=1,158; 2022 n=1,382

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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.

The proportion of people speaking English visiting an NPWS park is significantly lower in 2022 (94.9%) than in 2008, 2012 and 2014, as is the proportion of visits by people speaking English in 2022 (96.6%). While one in 12 visitors spoke a language other than English in 2022 (8.5%), only one in 14 visits were made by this cohort (7.0%).

There was a slight increase in the proportion of visitors to NPWS parks who speak Mandarin and Cantonese in 2022 (1.3% and 1.2% respectively) with a corresponding significant increase in the proportion of visits undertaken by Mandarin and Cantonese speakers (1.0% and 0.6% respectively). Whilst the proportion of visitors speaking Hindi remained at 2020 levels in 2022 (0.6%), the proportion of visits from Hindi speakers increased from 0.4% in 2020 to 1.1% on 2022.

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

Language	Visited a NPWS Park in Last 4 weeks								Adult Visits to a NPWS Park in Last 4 weeks							
	2008	2010	2012	2014	2016	2018	2020	2022	2008	2010	2012	2014	2016	2018	2020	2022
English	97.4%	96.8%	98.4%	97.4%	93.9%	96.5%	95.7%	94.9%	98.8%	96.3%	98.7%	98.4%	95.9%	97.6%	97.8%	96.6%
Total Languages other than English	8.1%	7.6%	10.4%	10.9%	11.8%	9.7%	10.9%	8.5%	6.0%	6.4%	10.8%	8.4%	9.8%	8.3%	8.4%	7.0%
Mandarin	1.2%	0.8%	0.6%	1.0%	1.5%	1.0%	1.1%	1.3%	0.5%	1.9%	0.3%	0.8%	1.0%	0.4%	0.9%	1.0%
Cantonese	0.3%	0.6%	0.4%	0.9%	1.2%	0.4%	1.0%	1.2%	0.2%	0.2%	0.2%	0.5%	0.5%	0.2%	0.4%	0.6%
Spanish	0.5%	0.7%	1.7%	1.1%	1.0%	0.7%	1.3%	0.5%	1.0%	0.5%	1.2%	1.2%	0.9%	0.6%	0.6%	0.3%
Arabic	0.1%	0.4%	0.7%	0.7%	0.7%	1.0%	0.4%	0.4%	*	0.4%	0.7%	0.8%	0.4%	0.6%	0.2%	0.2%
German	0.6%	0.6%	0.6%	0.3%	0.7%	0.8%	1.0%	0.3%	1.1%	0.3%	0.7%	0.4%	0.6%	0.5%	0.8%	0.4%
Italian	0.4%	0.3%	0.7%	0.6%	0.5%	0.7%	0.8%	0.4%	1.5%	0.2%	0.9%	0.5%	0.3%	0.5%	1.5%	0.3%
Hindi	0.4%	0.2%	0.2%	0.6%	0.5%	0.8%	0.6%	0.6%	0.2%	0.1%	0.1%	0.3%	0.3%	0.6%	0.4%	1.1%
Tagalog (Filipino)	0.2%	0.4%	0.2%	0.1%	0.4%	0.2%	0.4%	0.1%	0.2%	0.2%	0.1%	*	0.3%	0.3%	0.3%	0.2%
Greek	0.5%	0.1%	0.2%	0.6%	0.3%	0.4%	0.8%	0.3%	0.9%	0.1%	0.2%	0.3%	0.2%	0.2%	1.8%	0.2%
Vietnamese	0.5%	0.1%	0.1%	0.3%	0.1%	0.1%	0.1%	0.3%	0.3%	*	*	0.2%	0.1%	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%	3.6%	3.5%	2.7%	6.6%	4.2%	4.9%	4.4%	2.4%	3.0%
French	n/a	n/a	n/a	0.7%	0.6%	0.9%	0.4%	0.6%	n/a	n/a	n/a	0.5%	0.4%	0.7%	0.2%	0.5%
Russian	n/a	n/a	n/a	0.3%	0.4%	0.2%	0.6%	0.4%	n/a	n/a	n/a	0.1%	0.4%	0.2%	1.1%	0.3%
Portuguese	n/a	n/a	n/a	0.3%	0.3%	0.3%	0.5%	0.4%	n/a	n/a	n/a	0.3%	1.2%	0.2%	0.2%	0.4%
Korean	n/a	n/a	n/a	0.5%	0.2%	*	-	0.3%	n/a	n/a	n/a	0.2%	0.2%	*	*	0.4%
Japanese	n/a	n/a	n/a	0.2%	0.1%	0.4%	0.3%	0.1%	n/a	n/a	n/a	0.1%	*	1.1%	0.2%	0.2%
Punjabi	n/a	n/a	n/a	*	0.1%	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%	3.6%	n/a	n/a	n/a	2.5%	2.5%	4.3%	2.4%	2.9%

Note: Total sum to great than 100% as some visitors can speak multiple languages

Source: NPWS Parks Visitor Surveys 2008 – 2022

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; 2022n=1,382

\* Less than 0.5% response.

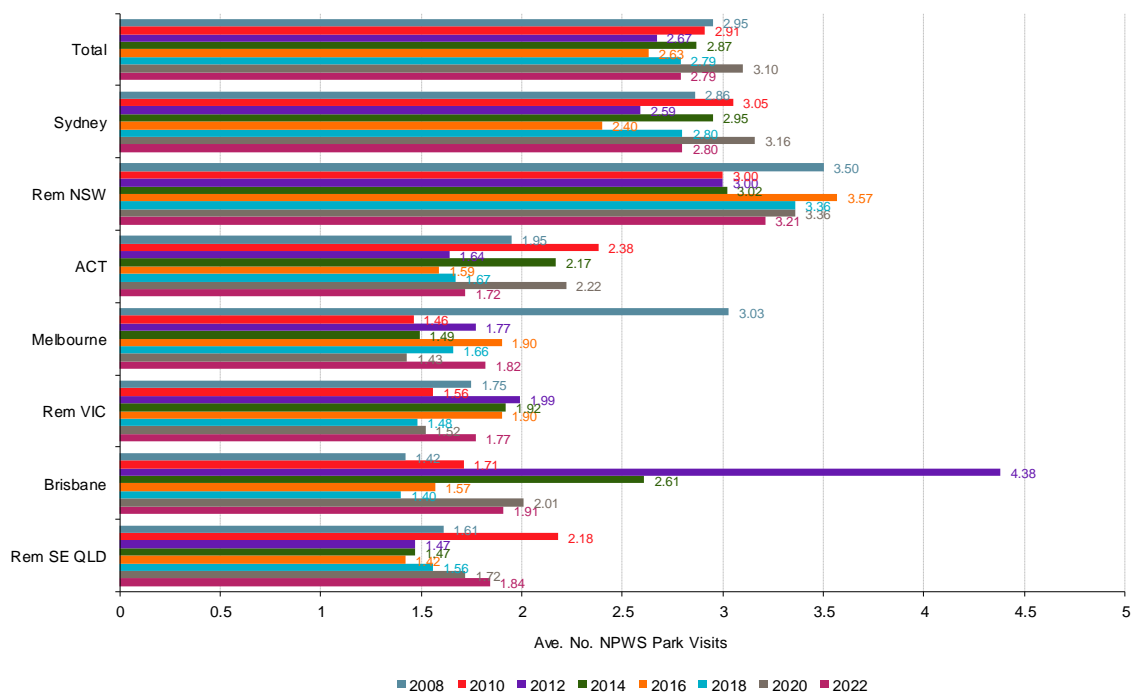
### 8.3 Number of Individual Visits made to NPWS Managed Parks by Adults

Detailed discussion of number of adult visits is provided in section 7.2 of this document (including Chart 36) examining potential factors influencing NPWS park visitation, with a summary provided below.

The average number of visits by adults declined in 2022, from its highest recorded figure in 2020 – 3.10 visits per adult visitor to 2.79 (Chart 80). 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 2022, the number of proxy adult visitors to NPWS parks was 14,515,879 compared with 12,423,157 in 2020, the 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 in 2022 decreased from 2020 levels in Sydney (3.16 to 2.80), Remainder NSW (3.36 to 3.21), the ACT (2.22 to 1.72) and Brisbane (2.01 to 1.91), but increased for Melbourne (1.43 to 1.82), Remainder VIC (1.52 to 1.77), and Remainder SE QLD (1.72 to 1.84).

Chart 80: Average Number of Adult Visits to NPWS Parks by Region of Origin



Source: NPWS Parks Visitor Surveys 2008 – 2022  
 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; 2022 n=1,382

Across all years, average number of visits to NPWS parks generally increases with age (average 2.41 for 18-24 to 3.27 for 50+). However, in 2022 the highest average number of visits were by 18-24 year olds (3.36), followed by people aged 50+ (3.02), 24-34 year olds (2.60) and 35-49 year olds (2.42). the 2020 average for 18-24 year olds in 2022 is the highest recorded.



## 8.4 Duration of Visit to a NPWS Park

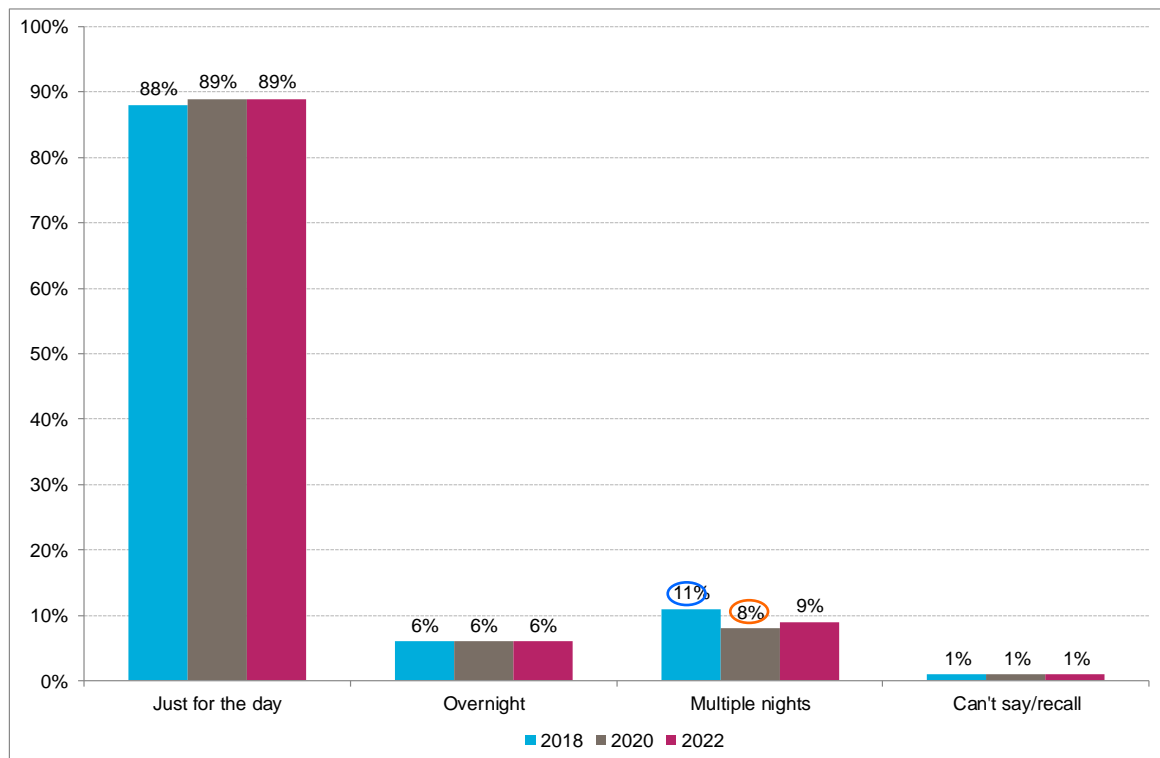
In 2018 NPWS park visitors were asked a new question for each different NPWS park they visited namely the *duration* of their visit: This question was repeated in 2020.

*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 2022, similar to 2018 and 2020 (88% and 89% respectively). Just 6% of visits were *overnight* in each of 2018, 2020 and 2022, while 9% of visits in 2022 were for *multiple night* visits, compared with 8% in 2020 and 11% in 2018 (See Chart 81).

Chart 81: Duration of Visit to NPWS Park



Source: NPWS Parks Visitor Surveys 2018-2022  
Base: 2018 n=1,741; 2020 n= 1,178; 2022 n=1,413

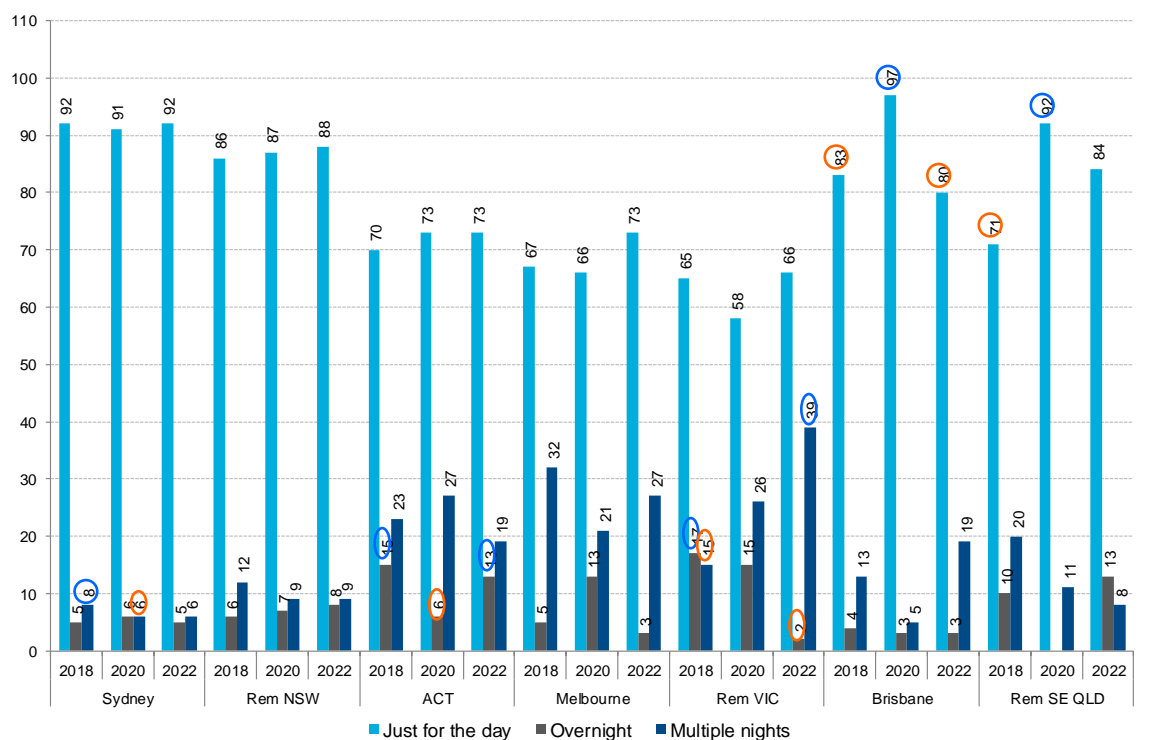
○ Significantly lower  
○ Significantly higher

Not surprisingly, visiting a NPWS park *just for the day* was more likely if there were a large number of proximate parks to where one lived (see Chart 82). Over nine in ten visitors from Sydney visited *just for the day* in 2022 (92% - 2020 91%; 2018 92%), followed by 88% of those in remainder NSW (2020 87%| 2018 86%). 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), but in 2022 proportions reverted to 2018 levels (80% and 84% respectively). This is likely due to the impact of COVID-19 restrictions in 2020 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.

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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, 30% of Melbourne residents, 32% of ACT residents and 41% of remainder VIC residents visited a NPWS park in 2022 *at least overnight*. However, for Melbourne and ACT residents this high proportion still declined in 2022 (from 37% 2018; 34% - 2020 and 37% - 2018; 32%- 2020 respectively), while for remainder VIC the proportion was stable (42% in 2020). A significant decline was observed in the proportion of ACT residents that visited NPWS parks *overnight* from 2018 to 2020 (15% to 6%), but rebounded significantly in 2022 (13%). The proportion staying multiple nights from residents of Remainder VIC has increased significantly from 15% in 2018 to 39% in 2022.

Chart 82: Duration of Visit to NPWS Park by Region of Origin



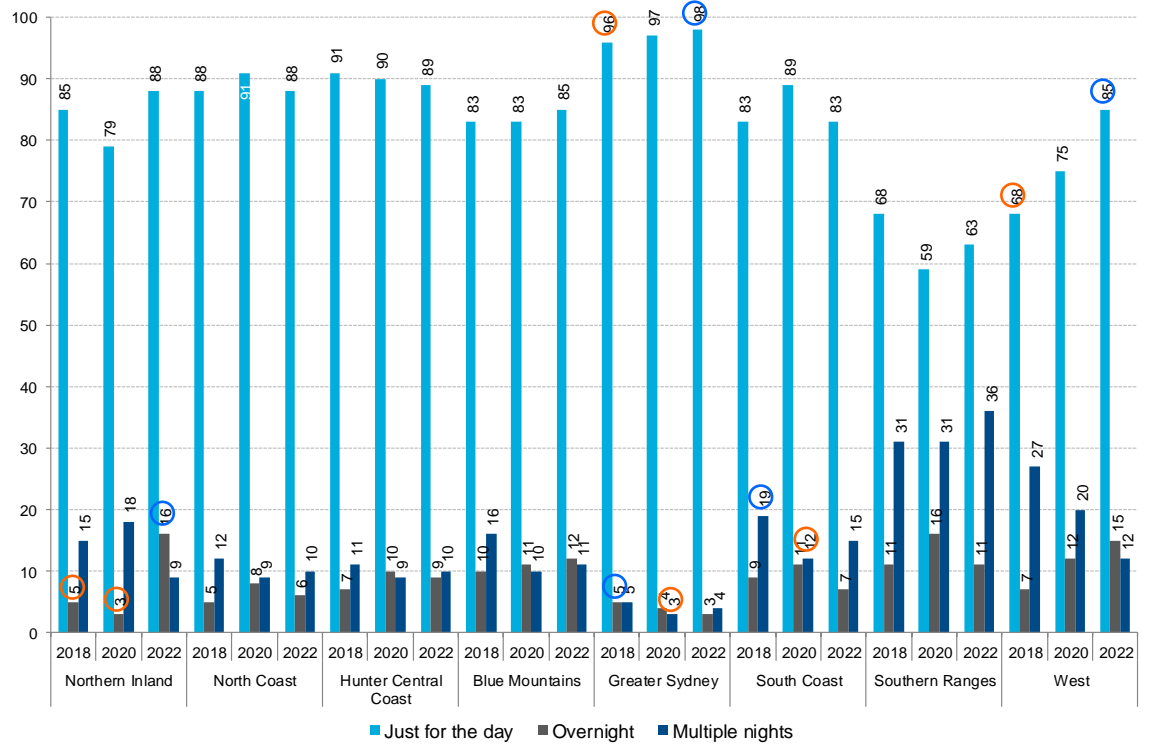
Source: NPWS Parks Visitor Surveys 2018-2022  
Base: 2018 n=1,741; 2020 n= 1,178; 2022 n=1,413

○ Significantly lower  
○ Significantly higher

Analysis of duration of trip by NPWS Management Branch (Chart 83) shows that the highest proportion of visits *just for the day* are to parks in the Greater Sydney Branch (98% - 2022; 97% - 2020; 96% - 2018), the North Coast Branch (88% - 2020; 91% - 2020 88% - 2018) and the Hunter Central Coast Branch (89% - 2022; 90% - 2020; 91% - 2018). The proportion of *at least overnight visits* is highest in the Southern Ranges Branch (46% - 2022; 47% - 2020; 42% - 2018) and the West Branch (37% - 2022; 32% - 2020; 34% - 2018).

It should be noted that visitors to the West Branch visiting *just for the day* increased to 85% in 2022, significantly higher than the 2018 result (68%) and higher than the 2020 result (75%).

Chart 83: Duration of Visit to NPWS Park by NPWS Management Branch



Source: NPWS Parks Visitor Surveys 2018-2022  
 Base: 2018 n=1,741; 2020 n= 1,178; 2022 n=1,413

○ 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, 2020 and 2022 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

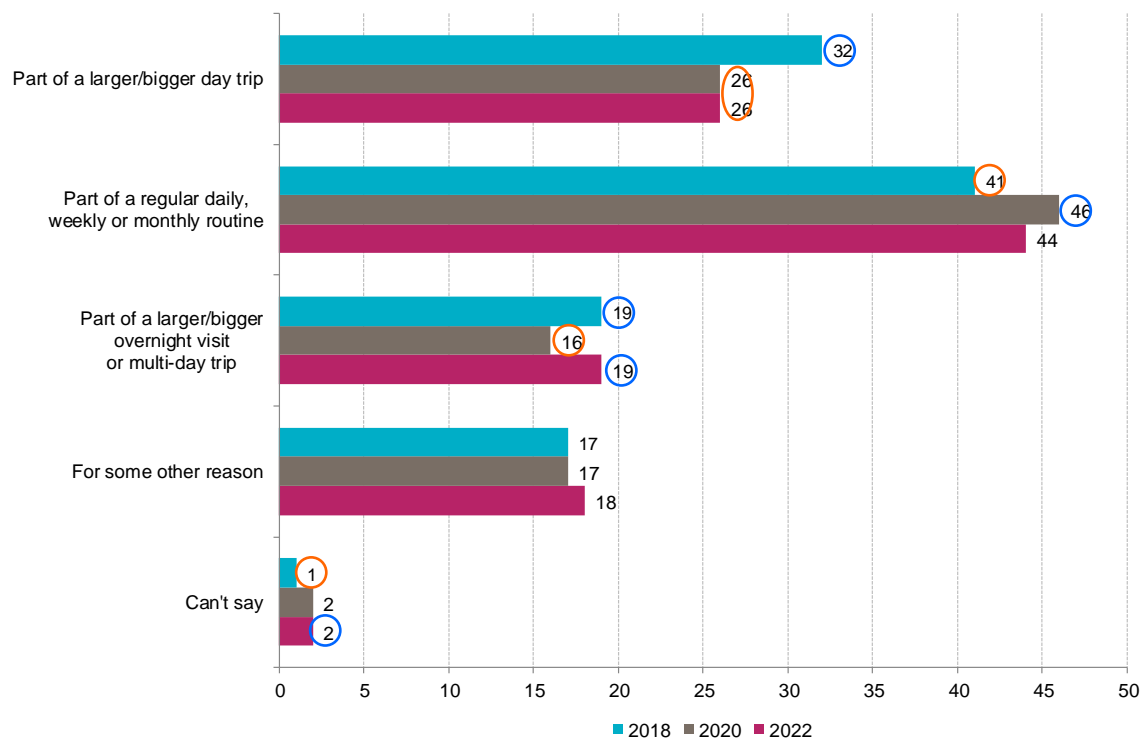
## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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 2022 there has been significant falls in the proportion of visitors accessing NPWS parks as *part of a larger/bigger day trip* (32% in 2018 down to 26% in both 2020 and 2022). or as *part of a larger/bigger overnight visit or multi-day trip* (19% down to 16% - Chart 84). Significant declines in the proportion visiting as *part of a larger/bigger overnight visit or multi-day trip* were evident from 2018 (19%) to 2020 (16%), but the proportion significantly rebounded in 2022 to 19%.

From 2018 to 2022 there was 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. In 2022 the portion increased to 44%.

Chart 84: Type of Trip to NPWS Park



Source: NPWS Parks Visitor Surveys 2018-2022  
Base: 2018 n=1,741; 2020 n= 1,220; 2022 n=1,412

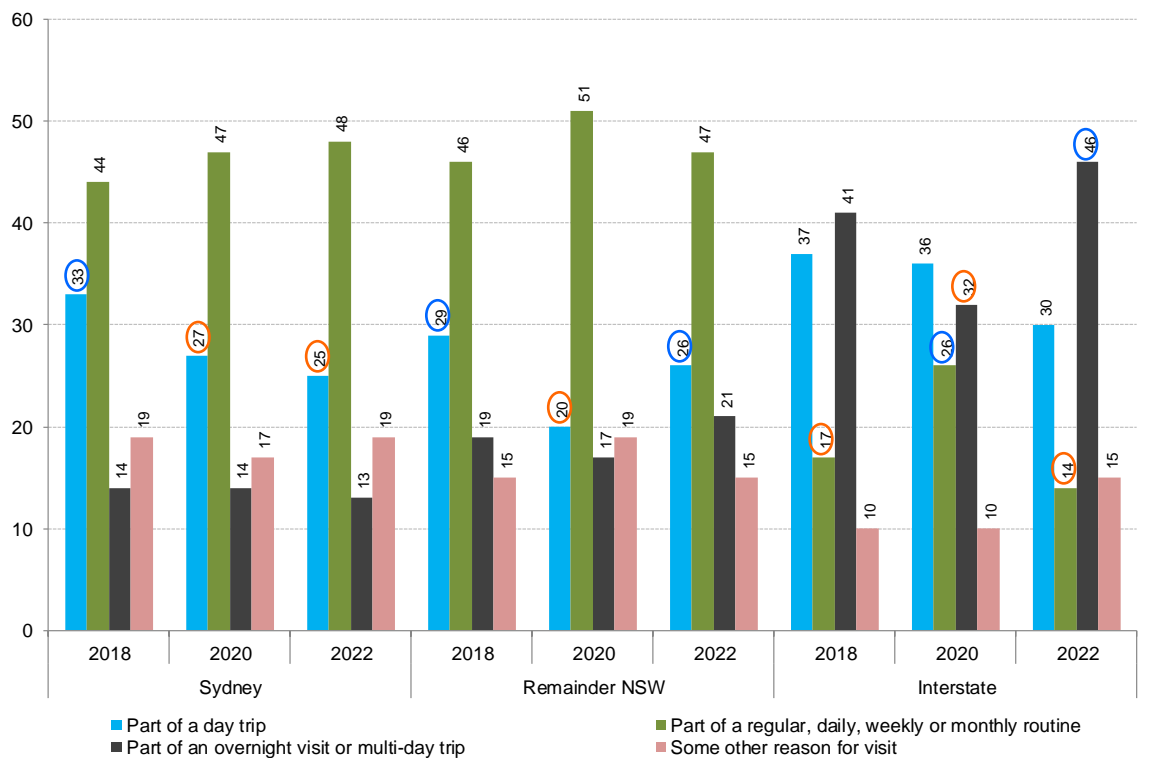
○ Significantly lower  
○ Significantly higher

Chart 85 shows type of trip by broad region of origin. From 2018 to 2022 there has been a significant decline in the proportion of visits as *part of a day trip* in Sydney (from 33% in 2018 to 25% in 2022). A similar decline was evident from 2018 to 2022 for Remainder NSW (29% - 2018 to 20% - 2020), but the proportion rebounded significantly in 2022 to 26%. Part of a day trip appears to be in decline for interstate visitors with proportions falling from 37% in 2018 to 30% in 2022.

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

From 2018 to 2022 around 50% of visits from residents in both Sydney and Remainder NSW are undertaken 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 both 2018 and 2022 results (17% - 2018; 26% - 2020; 14% - 2022), with corresponding declines and rebounds observed in proportions of those visiting a *part of an overnight visit or multi-day trip* (41% - 2018 32% - 2020; 46% - 2022).

Chart 85: Type of Trip to NPWS Park by Region of Origin



Source: NPWS Parks Visitor Surveys 2018-2022  
Base: 2018 n=1,741; 2020 n=1,220; 2022 n=1,412

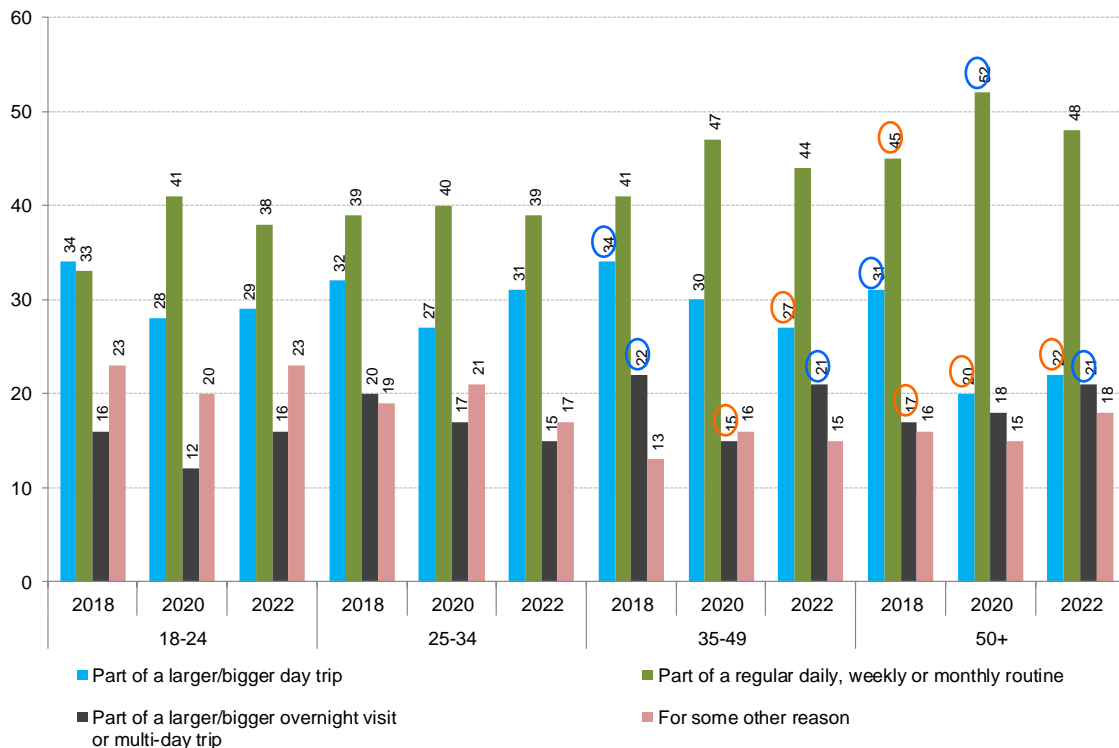
Significantly higher  
Significantly lower

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*. However, proportions rebounded in 2022 for all groups except 35-49 year olds, where proportions continued to decline (34% - 2018; 30% - 2020; 27% - 2022).

Increases from 2018 to 2020, with slight declines in 2022 in proportions of people visiting as *part of a regular daily, weekly or monthly routine* were observed across all age groups (Chart 86).

Visitation as *part of a larger/bigger overnight visit or multi-day trip* declined from 2018 to 2020 and rose again in 2022 for 18-24 year olds and 35-39 year olds. Visits as *part of a larger/bigger overnight visit or multi-day trip* have declined for 25-34 year olds (20% - 2018; 17% - 2020; 15% - 2022), while they have increased for those aged 50+ over the same period (17% - 2018; 18% - 2020; 21% - 2022).

Chart 86: Type of Trip to NPWS Park by Age



Source: NPWS Parks Visitor Surveys 2018-2022  
 Base: 2018 n=1,741; 2020 n=1,220; 2022 n=1,412

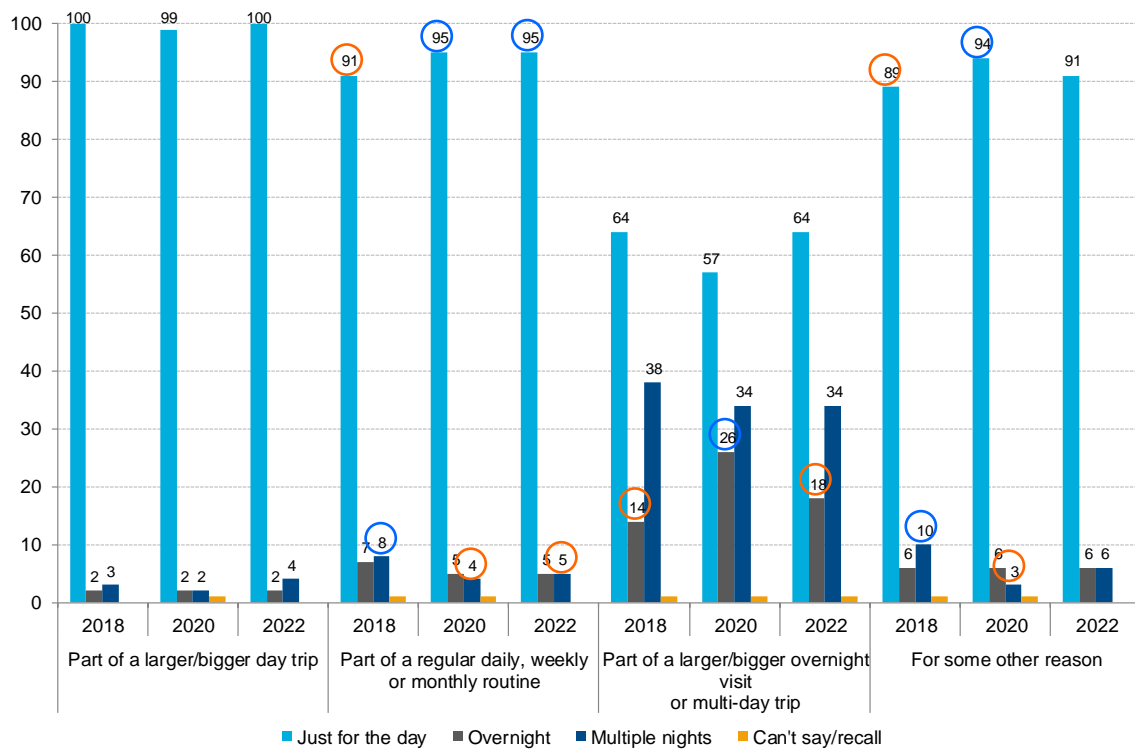
Significantly higher  
 Significantly lower

When duration of NPWS park visit is analysed by type of visit taken (Chart 87) 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 both 2022 and 2020 than in 2018 for those whose visit was *part of a regular daily, weekly or monthly routine* (91% - 2018; 95% - 2020; 95% - 2022), with the proportion visiting for *multiple nights* declined significantly over the same period (8% - 2018; 4% - 2020; 5% - 2022).

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, but then declined significantly to 18% in 2022.

Chart 87: Type of Visit to NPWS Park by Duration of NPWS Park Visit



Source: NPWS Parks Visitor Surveys 2018-2020  
 Base: 2018 n=1,741 | 2020 n= 1,220; 2022 n=1,412

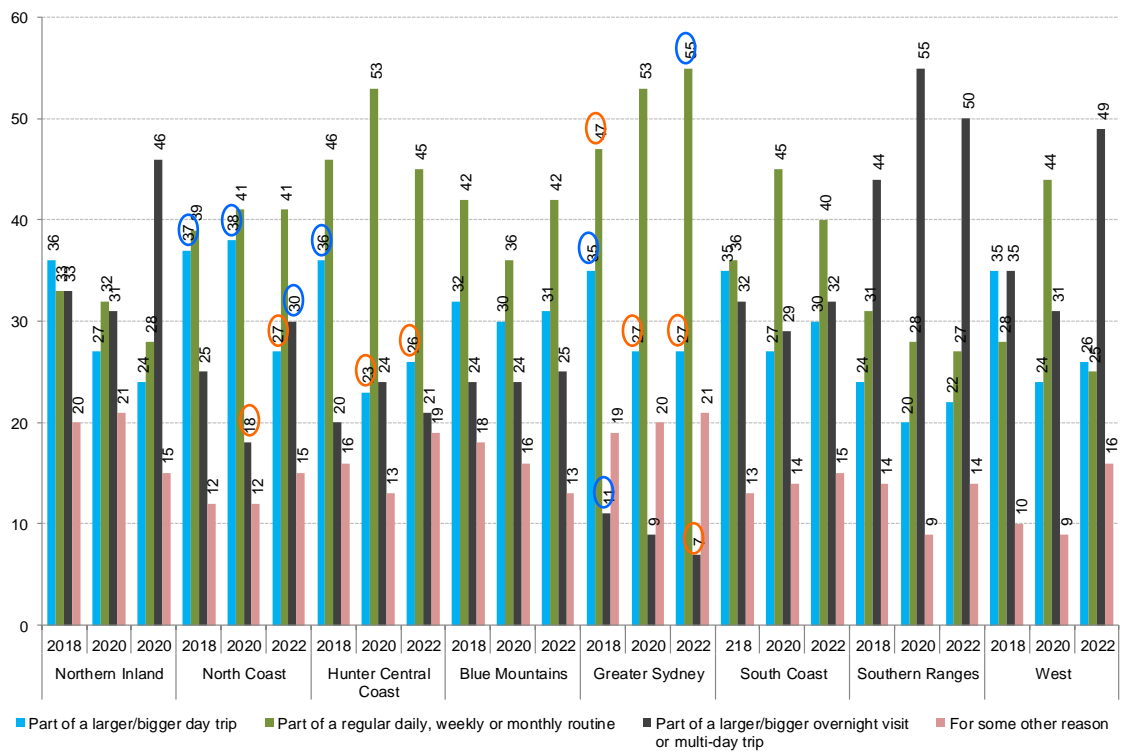
○ Significantly higher  
 ○ Significantly lower

Visits to NPWS parks are more likely to be undertaken as *part of a regular routine* when visiting parks in Greater Sydney Branch. This is because a large proportion of the urban population live in close proximity to parks in this Branch, thereby facilitating regular visitation (Chart 88). Visits as part of a *larger/bigger overnight or multi-day trip* are more common among in branches which are more remote from the 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 trip* declined from 2018 to 2022 for the Northern Inland Branch (36% - 2018; 27% - 2020; 24%- 2022), while declines over time were also observed for those visiting as *part of a regular daily, weekly or monthly routine* to parks in Northern Inland Branch (33% down to 28%) and Southern Ranges Branch (31% down to 27%). The opposite was the case for Greater Sydney Branch, with increases in the proportion visiting as *part of a regular daily, weekly or monthly routine* observed over time (47% up to 55%). This Branch also saw a decline in proportions visiting as part of a larger/bigger overnight visitor multi-day trip (11% down to 7%).

Type of visit appears to stay relatively stable for visitors to the Blue Mountains Branch over time (although the proportion naming *some other reason* has declined from 18% in 2018 to 13% in 2022).

Chart 88: 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, 2020 and 2022 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 89 shows that half of NPWS park visitors in 2022 indicated that their *only reason* for their trip was to visit the NPWS park (49%), significantly lower than the 2020 result (54%) and on par with the 2018 result (46%), but much higher than the waves 7-13 result in 2016 (34%). It can be seen that proportions were declining over time from 2016 to 2018 for all other roles that the park visit had in terms of intention for one’s trip. However, proportions in 2022 increased slightly for the park

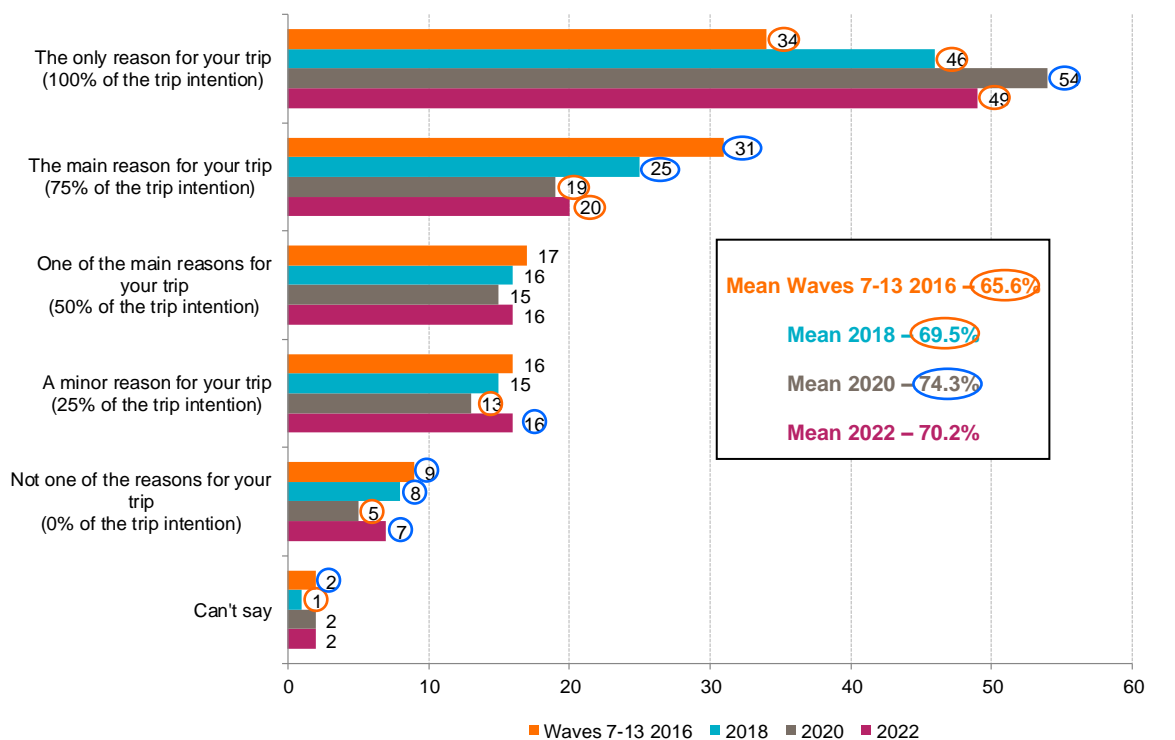


## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

being the *main reason for one's trip* (20%), *one of the main reasons for one's trip* (16%), a *minor reason for one's trip* (16%) and *not one of the reasons for one's trip* (7%),

Because of the higher proportion nominating their NPWS park visit as their *only reason* for their trip in 2020 than 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). However, for 2022 the mean declined to 70.2%, primarily due to the decline in the proportion nominating it was the *only reason* for their trip.

Chart 89: Role of NPWS Park Visit in Trip Decision



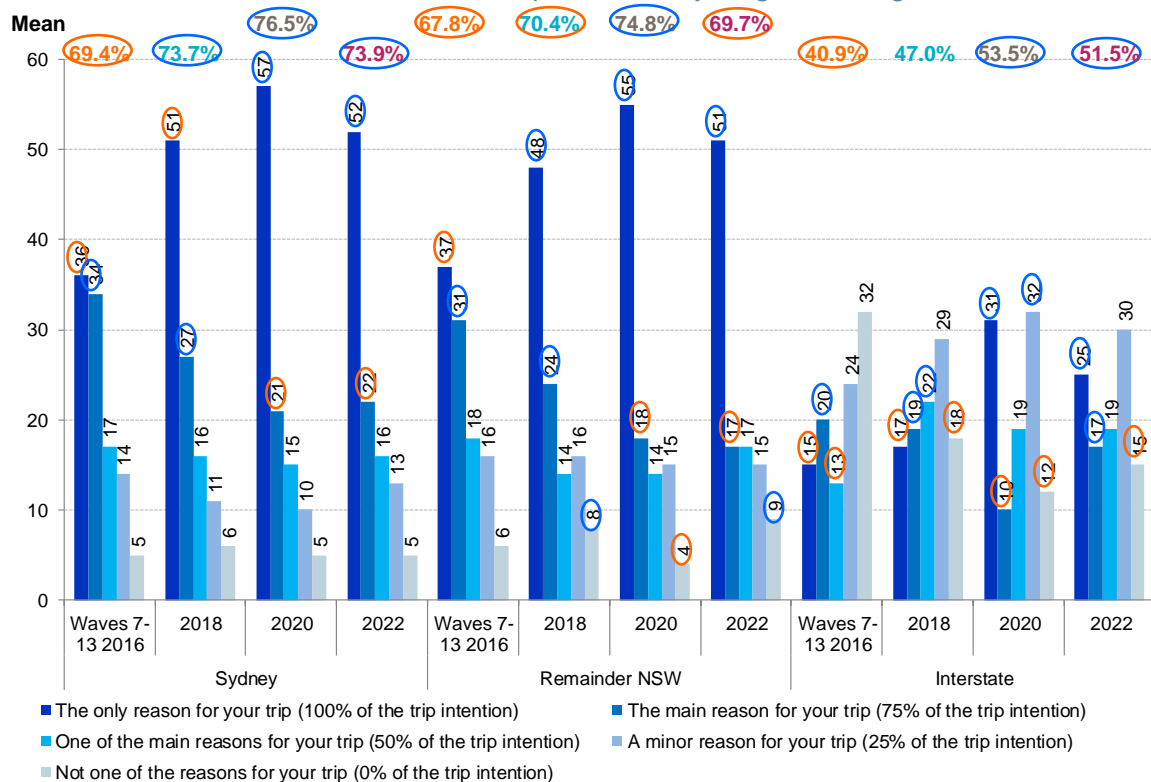
Source: NPWS Parks Visitor Surveys 2016–2022  
 Base: Wave 7-13 2016 n=849, 2018 n=1,741; 2020 n=1,220; 2022 n=1,412

○ Significantly higher  
 ○ Significantly lower

Further analysis by region of origin (Chart 90) 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 declines in proportions were observed in 2022 for the visit being *the only reason for their visit*, results were still significantly higher than 2016 levels and higher than 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 2022 (25% c.f. 52% and 51% respectively), it was still close to the leading response for interstate visitors (with a *minor reason for the trip* being 30% in 2022). Consequently, the mean score increased from 40.9% in 2016 to 47.0% in 2018 to 53.5% in 2020 and declined slightly to 51.5% in 2022 for interstate visitors (significantly higher than 2016 results). Similarly, mean scores for both Sydney residents and Remainder NSW declined from 2020 levels in 2022, and remained on par with 2018 levels and higher than 2016 levels.

Chart 90: Role of NPWS Park Visit in Trip Decision by Region of Origin



Source: NPWS Parks Visitor Surveys 2016–2022  
 Base: Wave 7-13 2016 n=849, 2018 n=1,741; 2020 n=1,220; 2022 n=1,412

Significantly higher  
 Significantly lower

An increase from 2016 to 2022 in the proportion of NPWS park visitors claiming that their park visit was the *only reason* for their trip was evident for the North Coast and Hunter Central Coast Branches, (Chart 91). In general, other Branches tended to show increases from 2016 to 2020 in proportions claiming that their visit was their *only reason* for their trip, but proportions declined in 2022.

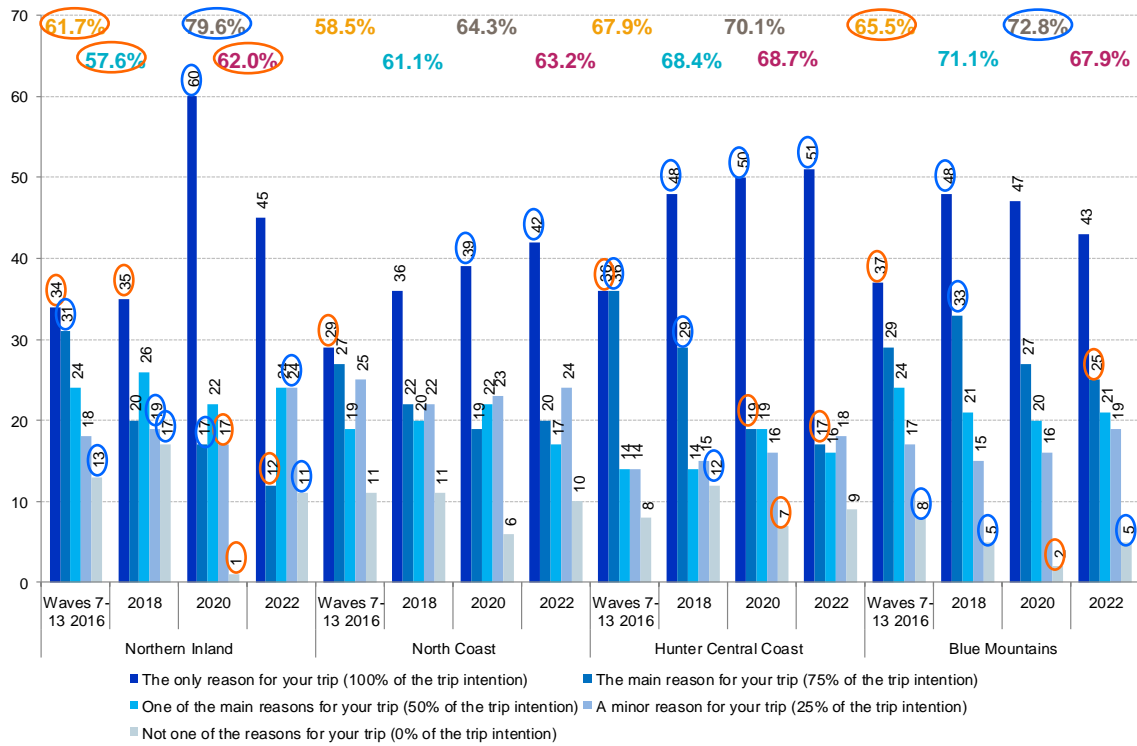
The proportion of visitors to the Northern Inland and Hunter Central Coast Branches indicating that their visit to an NPWS park was their *main reason* for their trip has declined from 2016 to 2022.

Mean scores have tended to increase from 2016 to 2022 across all Branches, but fall back marginally in 2022, generally below 2018 means (but above 2016 means)

The highest mean score in 2022 came from Greater Sydney Branch (76.6% - Chart 92), while the lowest came from the South Coast Branch (59.1%). The highest proportion of visitors visiting NPWS parks as their *only reason* for visiting were in the Greater Sydney Branch (57%), whilst the lowest came from the West Branch (34%).

2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

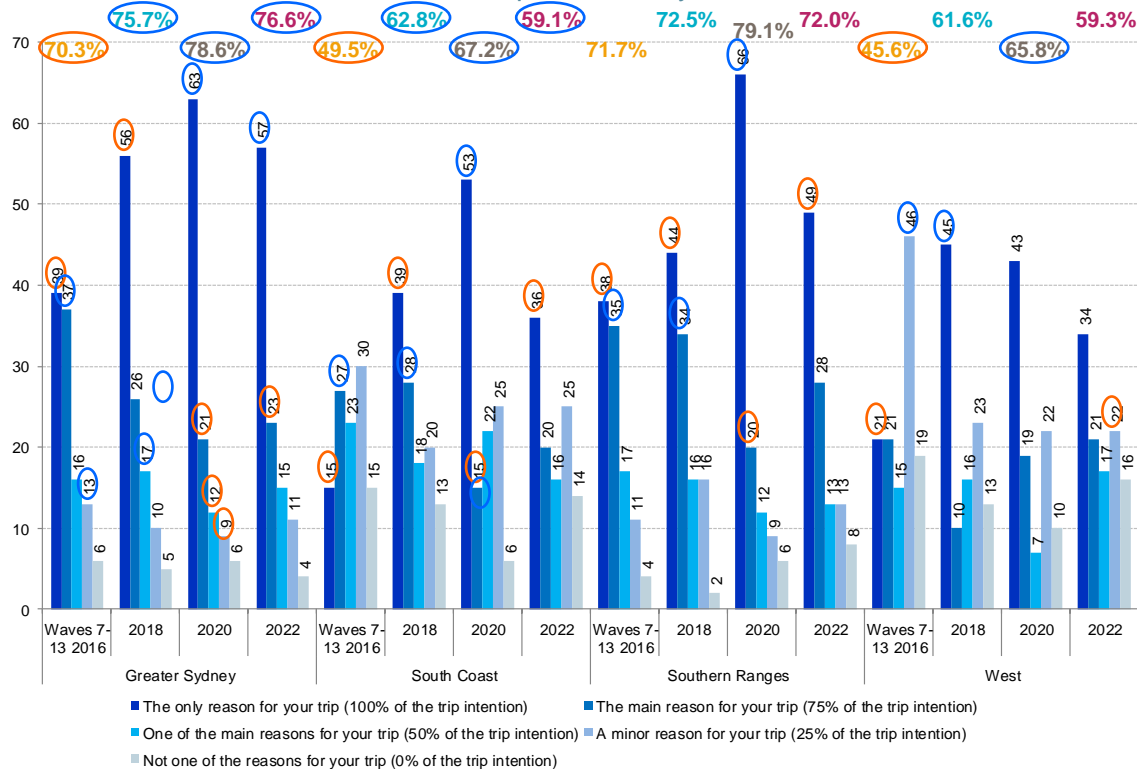
Chart 91: Role of NPWS Park Visit in Trip Decision by NPWS Branch 1



Source: NPWS Parks Visitor Surveys 2016-2022  
 Base: Wave 7-13 2016 n=849, 2018 n=1,741; 2020 n=1,220; 2022 n=1,412

Significantly higher  
 Significantly lower

Chart 92: Role of NPWS Park Visit in Trip Decision by NPWS Branch 2



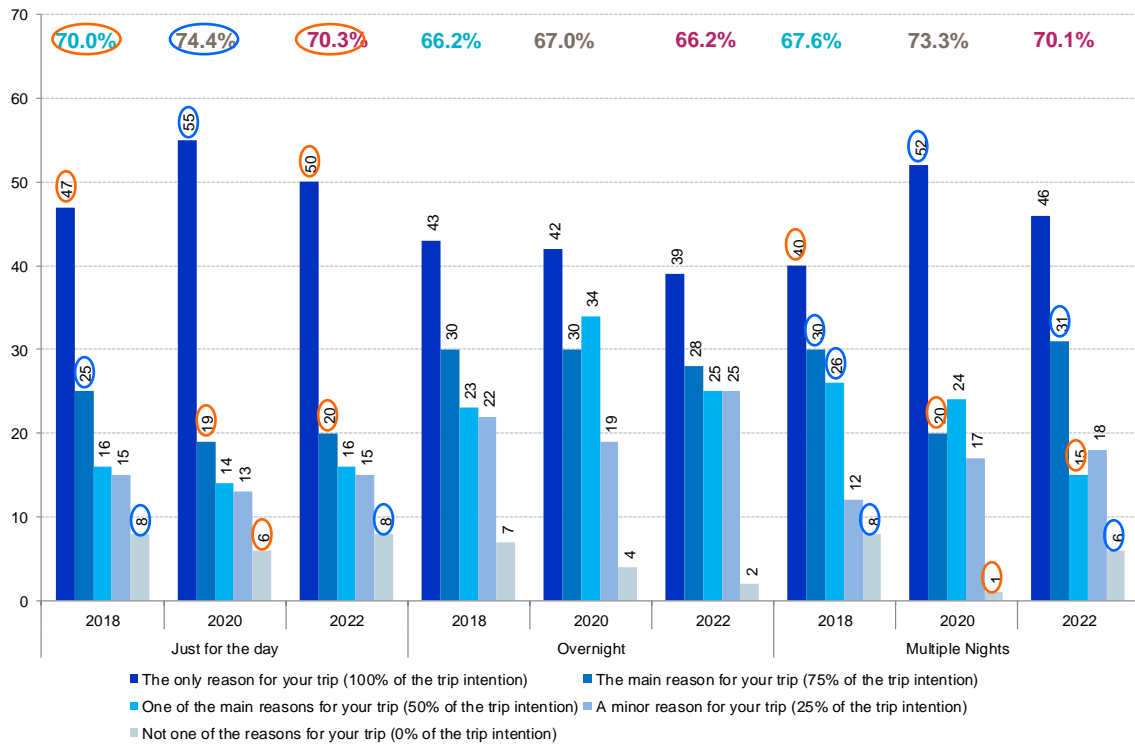
Source: NPWS Parks Visitor Surveys 2016-2022  
 Base: Wave 7-13 2016 n=849, 2018 n=1,741; 2020 n=1,220; 2022 n=1,412

Significantly higher  
 Significantly lower

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

When role of NPWS visit is analysed by *duration* of visit, it is apparent the proportion has declined from 2018 to 2022 for those who visited the park as their *only reason* for the visit, who stayed *overnight* (See Chart 93 – 43% - 2018; 42% - 2020; 39%). This decline was also evident for the *main reason* for the visit amongst those who stayed overnight (30% - 2018; 30% - 2020; 28% - 2022). Mean scores were significantly lower in 2022 than was the case in 2020, but higher or equal to 2018 mean scores for visiting *just for the day*, *overnight* and for *multiple nights*.

Chart 93: Role of NPWS Park Visit in Trip Decision by Duration of Visit

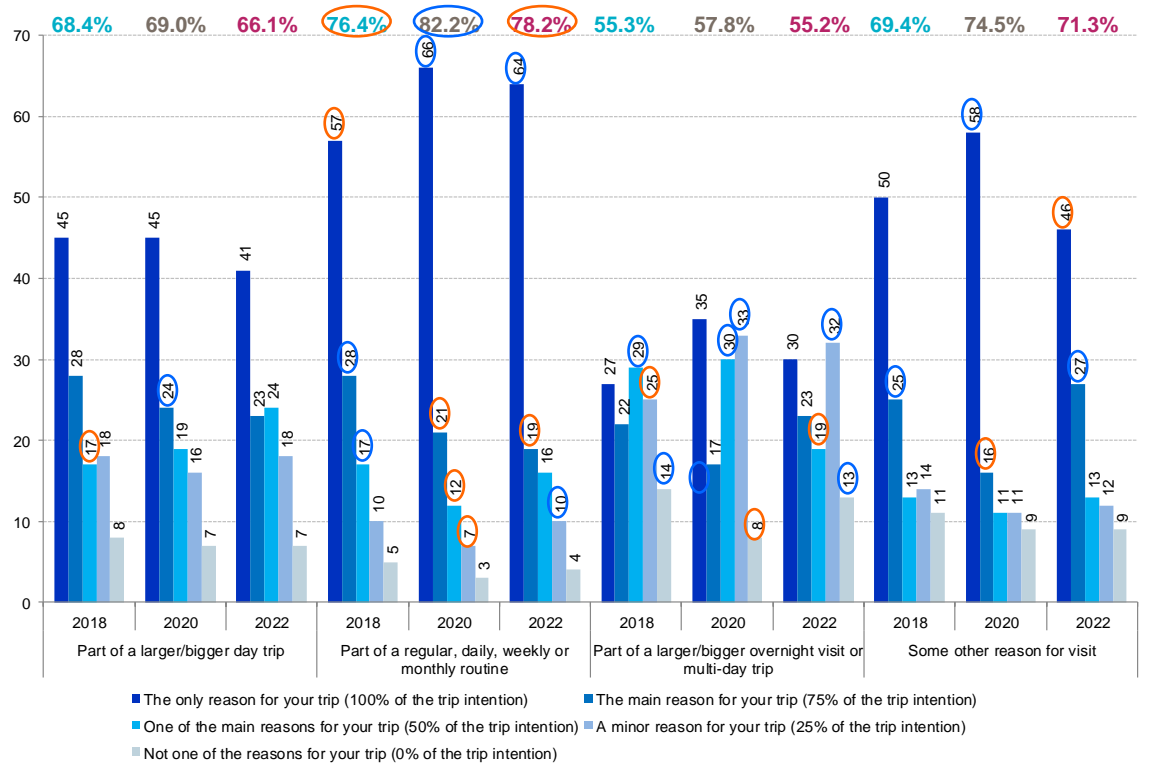


Source: NPWS Parks Visitor Surveys 2018-2022  
Base: 2018 n=1,741; 2020 n= 1,220; 2022 n=1,412

Significantly higher  
Significantly lower

Patterns for the role of each trip did marginal by *type* of visit. Those visiting as *part of a larger/bigger day trip* showed declines in the proportion over time claiming their visit was their only reason for their trip (2018 – 45%; 2020 – 45%; 2022 – 41%) and their main visit for their trip (28% - 2018; 24% 2020; 23% - 2022 - see Chart 94). As a result the mean score for those visiting as *part of a larger/bigger day trip* was the lowest recorded in 2022 (66.1%). The mean score was also the lowest recorded in 2022 for the trip being *part of a larger/bigger overnight visit or multi-day trip* (55.2%).

Chart 94: 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

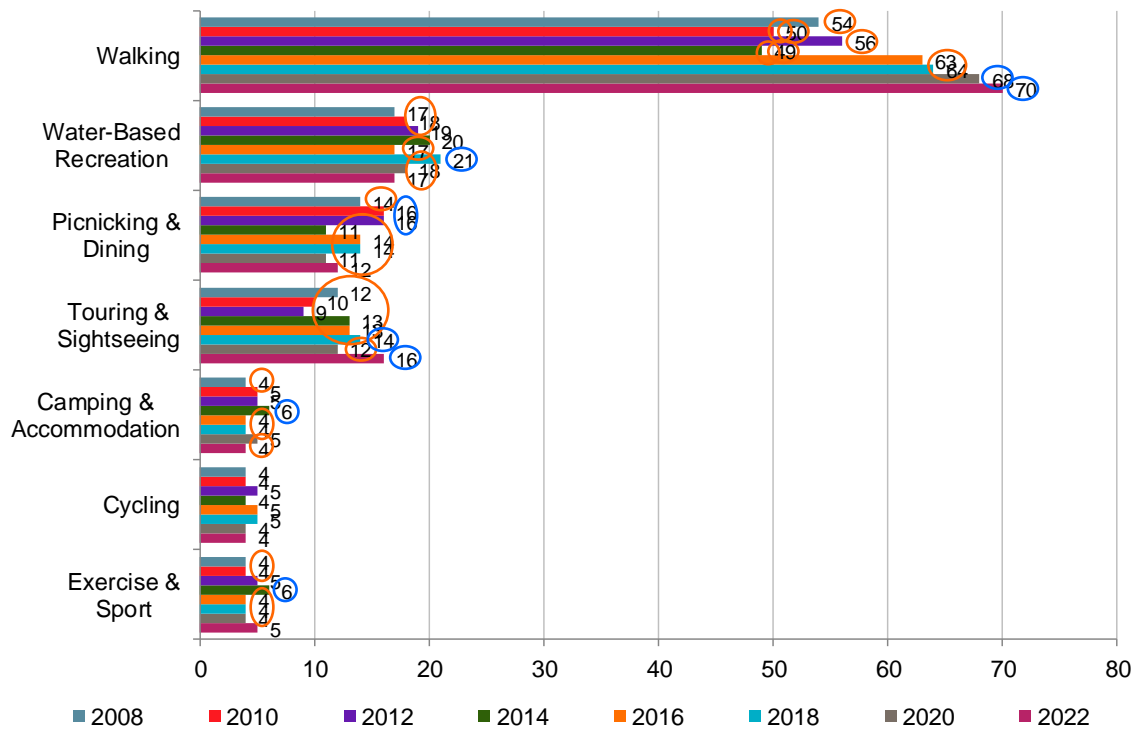
○ Significantly higher  
 ○ Significantly lower

## 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 2022.

The detailed list of activities was grouped into broader categories for analysis (see Charts 95 and 96). The most commonly named activity group undertaken at NPWS parks was *walking*, undertaken by a high 70% of people in 2022. This was followed by *water-based recreation*, (17% - down from a peak of 21% in 2018), *picnicking and dining*, (12% - down from a peak of 16% in 2010 and 2012) and *touring and sightseeing* (16% - the highest yet recorded). All other activities were nominated by 5% or fewer visitors in 2022. *Rest and relaxation* attained its highest every proportion in 2022 (5% - see Chart 107).

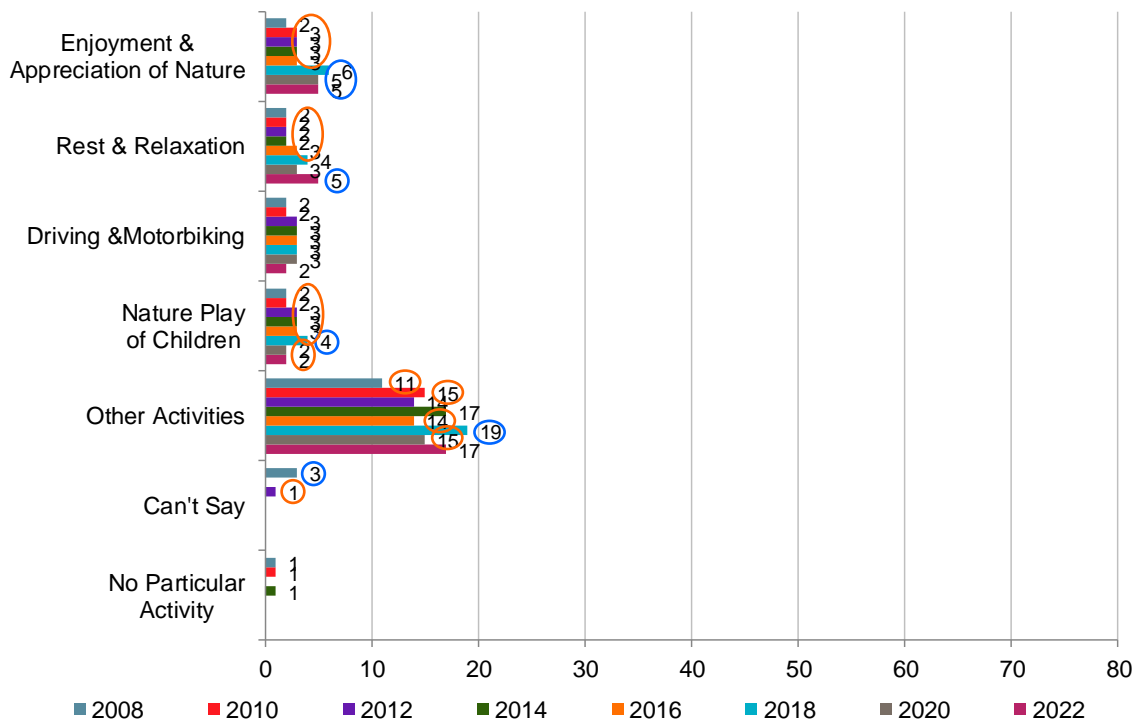
Chart 95: Main Activities Undertaken on Most Recent Visit to a NSW Park



Source: NPWS Parks Visitor Surveys – Most recently visits NPWS park 2008–2022  
 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; 2022 n=1,310

○ Significantly lower  
 ○ Significantly higher

Chart 96: Other Activities Undertaken on Most Recent Visit to a NSW Park



Source: NPWS Parks Visitor Surveys – Most recently visits NPWS park 2008–2022  
 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; 2022 n=1,310

○ Significantly lower  
 ○ Significantly higher

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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* has significantly increased from 2020 onwards and attained its highest level of 70% in 2022. The increase in walking activities over time is almost entirely due to the significant increase in the proportion nominating *walking/bushwalking* since 2020.

Incidence of *water-based recreation* declined to 17% in 2022 from the peak attained in 2018 (21%). The main sub-categories contributing to this activity were the proportion of visitors *swimming* (12% in 2022), *fishing* (3%) and *rowing/rafting/canoeing/kayaking* (3%).

The decline in the proportion of visitors *picnicking and dining* in 2020 and 2022 from the 2016 and 2018 peaks is directly related to the decline in visitors having *picnics and barbecues* (9% in 2020 and 2022). The significant rise in the proportion *touring and sightseeing* in 2022 can be attributed to the significant increase in the proportions undertaking *sightseeing* (12%), and *lookouts and scenery* (5%) in 2022.

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	2022
ACTIVITY - SUMMARY		n=1,487	n=1,341	n=1,341	n=1,555	n=1,582	n=1,614	n=1,117	n=1,310
Walking	Orienteering And Rogaining	*	*	*	*	*	*	-	*
	Walking The Dog	2%	1%	1%	1%	1%	2%	2%	2%
	Walking/ Bushwalking	52%	49%	55%	48%	63%	62%	67%	68%
<b>Walking Total</b>		<b>54%</b>	<b>50%</b>	<b>56%</b>	<b>49%</b>	<b>63%</b>	<b>64%</b>	<b>68%</b>	<b>70%</b>
Water-Based Recreation	Fishing	4%	6%	6%	5%	4%	5%	4%	3%
	Motor Boating/ Parasailing	1%	1%	1%	1%	1%	*	*	*
	Rowing/ Rafting/ Canoeing/ Kayaking	1%	1%	1%	3%	1%	3%	1%	3%
	Sailing/ Kite Surfing/ Sail Boarding	1%	*	1%	*	1%	1%	*	*
	Scuba Diving/ Snorkelling	*	1%	*	1	*	*	*	*
	Surfing	2%	2%	2%	2%	2%	2%	2%	1%
	Swimming	8%	9%	10%	10%	11%	13%	11%	12%
	Waterskiing	*	*	*	*	1%	*	*	*
	Other Water-Based Recreation	-	-	-	-	-	-	1%	1%
<b>Water-Based Recreation Total</b>		<b>17%</b>	<b>18%</b>	<b>19%</b>	<b>20%</b>	<b>17%</b>	<b>21%</b>	<b>18%</b>	<b>17%</b>
Picnicking And Dining	Dining/ Eating At Food Outlets	2%	2%	3%	3%	2%	2%	2%	3%
	Picnicking And Barbecues	11%	15%	13%	8%	12%	11%	9%	9%
<b>Picnicking And Dining Total</b>		<b>14%</b>	<b>16%</b>	<b>16%</b>	<b>11%</b>	<b>14%</b>	<b>14%</b>	<b>11%</b>	<b>12%</b>
Touring And Sightseeing	Holiday/ Break Away/ Weekend Trip	*	1%	*	1%	*	*	*	*
	Lookouts And Scenery	2%	2%	1%	3%	1%	3%	3%	5%
	Scenic Driving	3%	2%	1%	3%	1%	2%	3%	3%
<b>Touring And Sightseeing Total</b>		<b>12%</b>	<b>10%</b>	<b>9%</b>	<b>13%</b>	<b>13%</b>	<b>14%</b>	<b>12%</b>	<b>16%</b>

\* Less than 0.5% response

Source: NPWS Parks Visitor Surveys – Most recently visits NPWS park 2008– 2022

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; 2022 n=1,310

Significantly lower  
Significantly higher

Table 26 shows that the proportion of park visitors undertaking *walking* activities in 2022 increased significantly across all states of origin. The proportions undertaking *water-based recreation* and

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

*picnicking and dining* activities in 2022 increased significantly in Victoria, but declined significantly in NSW. *Touring and sightseeing* activities in 2022 increased significantly for those living in NSW and Southeast QLD.

Table 26: Main Activities Undertaken at Most Recently Visited NPWS Park by State of Origin

Main Activities	NSW								VIC							
	2008 n=	2010 n=	2012 n=	2014 n=	2016 n=	2018 n=	2020 n=	2022 n=	2008 n=	2010 n=	2012 n=	2014 n=	2016 n=	2018 n=	2020 n=	2022 n=
Walking	53%	50%	55%	49%	64%	64%	69%	70%	54%	45%	63%	45%	48%	72%	36%	69%
Water-Based Recreation	18%	18%	19%	20%	17%	21%	17%	16%	14%	19%	22%	12%	25%	22%	31%	30%
Picnicking And Dining	14%	18%	16%	11%	14%	14%	11%	12%	5%	6%	8%	8%	16%	7%	21%	20%
Touring And Sightseeing	12%	10%	8%	13%	12%	14%	11%	15%	20%	11%	19%	26%	22%	23%	12%	18%
Main Activities	ACT								SE QLD							
	2008 n=	2010 n=	2012 n=	2014 n=	2016 n=	2018 n=	2020 n=	2022 n=	2008 n=	2010 n=	2012 n=	2014 n=	2016 n=	2018 n=	2020 n=	2022 n=
Walking	52%	60%	52%	50%	67%	58%	68%	66%	59%	52%	54%	49%	70%	58%	73%	70%
Water-Based Recreation	12%	21%	17%	18%	26%	23%	18%	17%	14%	25%	23%	23%	13%	18%	15%	22%
Picnicking And Dining	7%	11%	6%	8%	6%	13%	13%	12%	14%	7%	13%	14%	9%	12%	7%	9%
Touring And Sightseeing	13%	12%	9%	12%	11%	17%	22%	16%	13%	14%	12%	9%	16%	12%	14%	22%

Source: NPWS Parks Visitor Surveys – Most recently visits NPWS park 2008–2022

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; 2022 n=1,310

Significantly lower  
Significantly higher

As can be seen in Table 27, people from both sexes and of all ages in 2022 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 50 years and over (from 19% in 2020 to 11% in 2020), but significant increases in these activities was observed amongst females aged 35-49 years in 2022 (from 18% in 2020 to 26% in 2022).

Significant declines 2022 in the proportions undertaking *picnicking and dining* were observed for males aged 18-24 years and 35-39 years and for females aged 25-34 years and 50 years and over.

The increase in the proportion *touring and sightseeing* in 2022 can be attributed to significant increases in males aged 18-24 years and 35 years and over, along with females aged 25 years and over.



2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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	2022
Walking	Male 18-24 yrs	33%	32%	49%	32%	54%	56%	65%	68%
	Male 25-34 yrs	42%	39%	40%	38%	54%	66%	64%	64%
	Male 35-49 yrs	57%	47%	49%	38%	56%	56%	53%	64%
	Male 50+ yrs	53%	47%	61%	48%	59%	57%	61%	62%
	Female 18-24 yrs	52%	47%	64%	51%	76%	67%	80%	77%
	Female 25-34 yrs	48%	64%	49%	58%	68%	76%	76%	82%
	Female 35-49 yrs	56%	57%	63%	57%	70%	65%	74%	74%
	Female 50+ yrs	68%	59%	63%	59%	75%	68%	77%	76%
Water-Based Recreation	Male 18-24 yrs	29%	28%	19%	26%	12%	33%	15%	21%
	Male 25-34 yrs	19%	27%	16%	29%	19%	24%	23%	20%
	Male 35-49 yrs	22%	22%	24%	23%	23%	25%	19%	22%
	Male 50+ yrs	12%	14%	18%	18%	15%	18%	19%	11%
	Female 18-24 yrs	15%	18%	25%	19%	27%	21%	22%	14%
	Female 25-34 yrs	15%	13%	17%	22%	11%	19%	18%	15%
	Female 35-49 yrs	21%	20%	23%	17%	18%	20%	18%	26%
	Female 50+ yrs	11%	11%	14%	13%	14%	18%	9%	14%
Picnicking And Dining	Male 18-24 yrs	12%	21%	12%	18%	14%	11%	7%	10%
	Male 25-34 yrs	14%	15%	10%	10%	14%	9%	8%	9%
	Male 35-49 yrs	10%	14%	17%	9%	13%	11%	9%	11%
	Male 50+ yrs	12%	15%	12%	8%	12%	13%	8%	12%
	Female 18-24 yrs	20%	21%	14%	15%	13%	15%	18%	16%
	Female 25-34 yrs	18%	17%	29%	10%	20%	16%	9%	11%
	Female 35-49 yrs	16%	19%	13%	10%	15%	13%	17%	16%
	Female 50+ yrs	13%	16%	18%	14%	13%	18%	14%	12%
Touring And Sight-seeing	Male 18-24 yrs	10%	5%	6%	8%	18%	9%	12%	17%
	Male 25-34 yrs	9%	12%	9%	11%	12%	11%	10%	16%
	Male 35-49 yrs	8%	7%	8%	11%	13%	19%	12%	16%
	Male 50+ yrs	21%	16%	9%	16%	15%	19%	16%	17%
	Female 18-24 yrs	18%	17%	*	14%	7%	13%	8%	8%
	Female 25-34 yrs	10%	5%	6%	8%	10%	8%	11%	13%
	Female 35-49 yrs	8%	6%	6%	14%	10%	13%	10%	17%
	Female 50+ yrs	12%	11%	16%	17%	15%	14%	10%	16%

Source: NPWS Parks Visitor Surveys – Most recently visits NPWS park 2008–2022

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; 2022 n=1,310

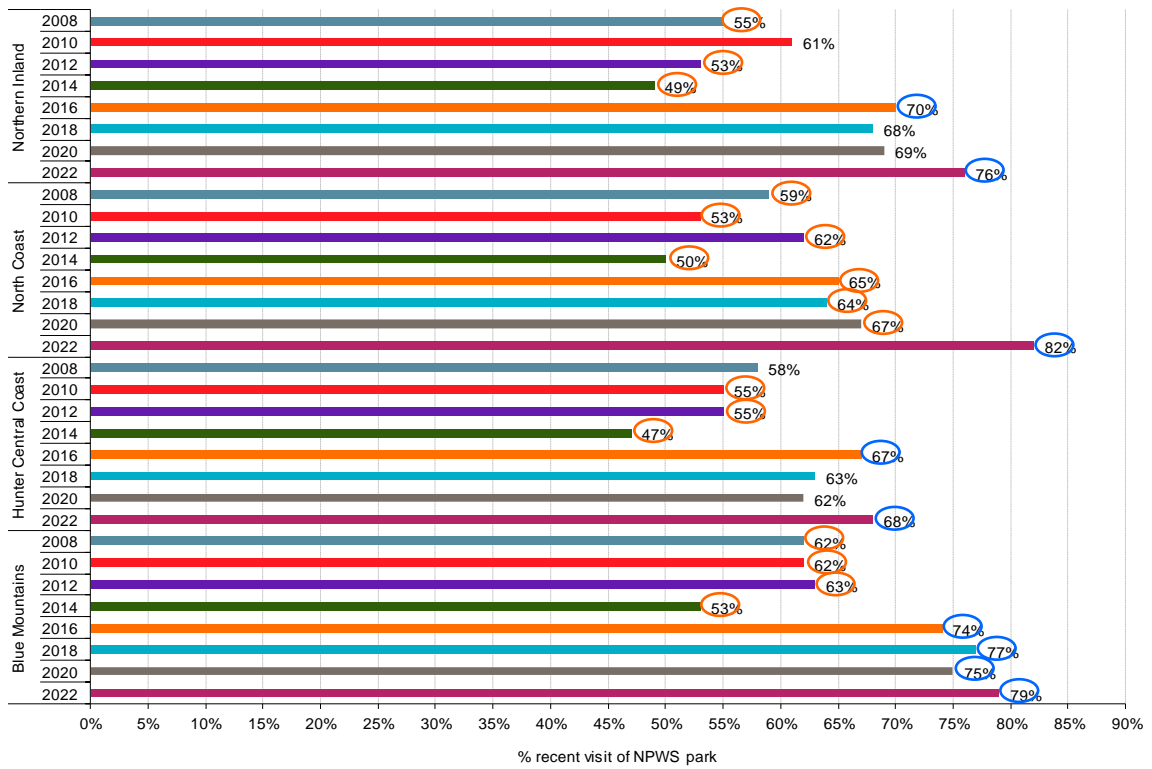
Significantly lower  
Significantly higher

Analysis of *walking* activities undertaken at one's most recently visited NPWS Park by Branch (Charts 97 and 98) shows that the highest incidences ever recorded were evident for the Northern Inland (70%), North Coast (82%), Hunter Central Coast (68%), Blue Mountains (79%) and West Branches (60%) in 2022, with the Greater Sydney Branch recording its equal highest proportion in both 2020 and 2022 (70%).

Charts 99 and Chart 100 show that incidence of *water-based recreation* activities declined to their lowest levels for the Northern Inland (5%) and Greater Sydney Branches in 2022 (13%). Declines from 2020 levels were evident for the North Coast Branch (34% to 28%), while increases were observed for the Hunter Central Coast (24% to 26%), Blue Mountains (5% to 12% - a significant increase), South Coast (21% to 27%) and Southern Ranges Branches (9% to 12%).

2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

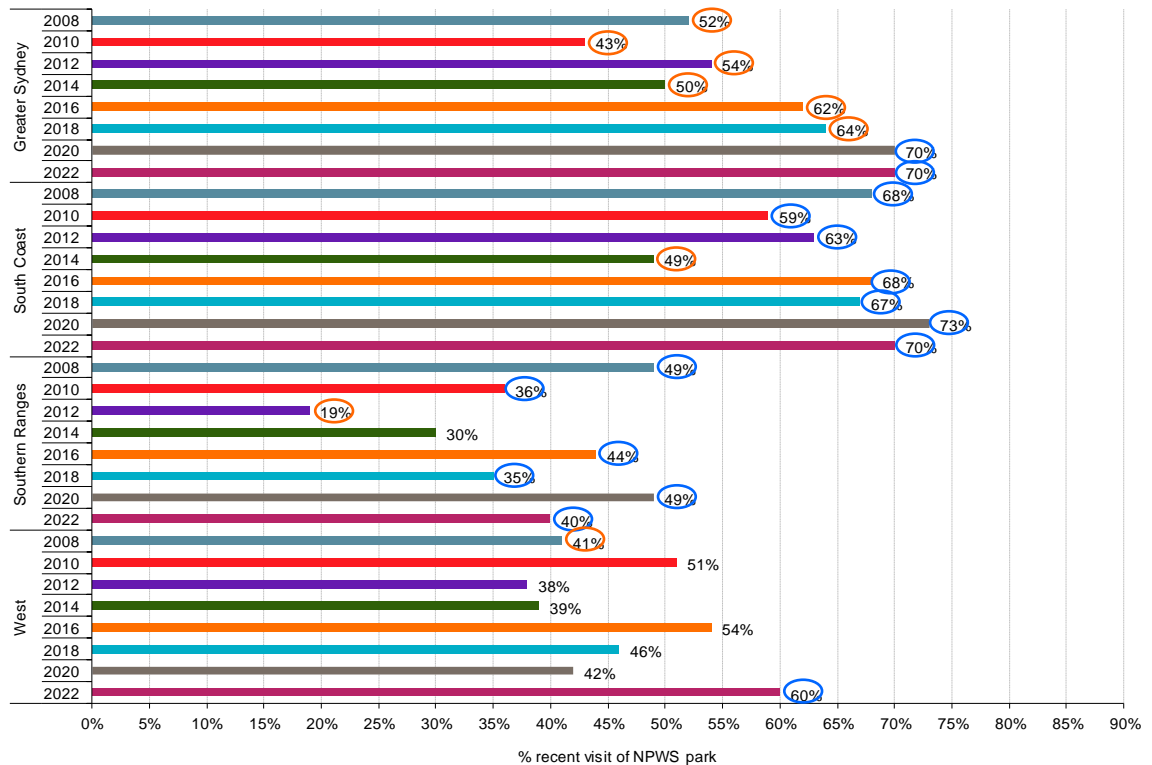
Chart 97: Walking Activities at Most Recently Visited NPWS Park by NPWS Branch (Pt 1)



Source: NPWS Parks Visitor Surveys – Most recent visit to a NPWS park 2008–2022  
 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; 2022 n=1,310

○ Significantly lower  
 ○ Significantly higher

Chart 98: Walking Activities at Most Recently Visited NPWS Park by NPWS Branch (Pt 2)

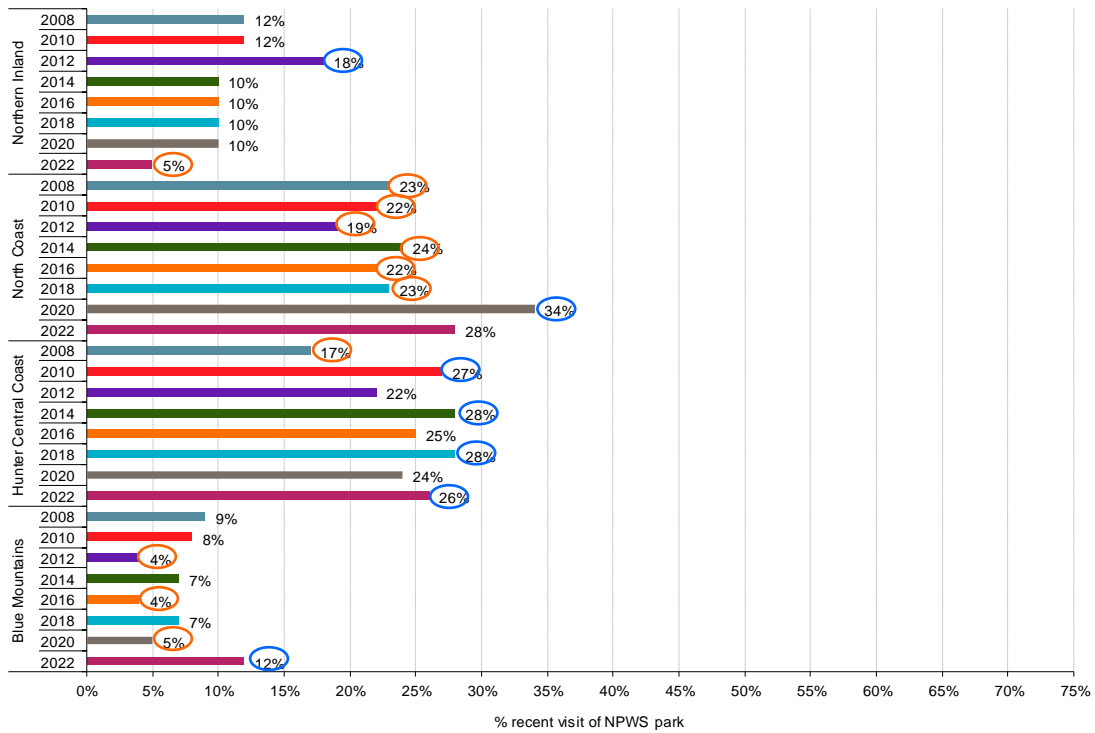


Source: NPWS Parks Visitor Surveys – Most recent visit to a NPWS park 2008–2022  
 Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582; 2018 n=1,614; 2020 n=1,017; 2022 n=1,310

○ Significantly lower  
 ○ Significantly higher

2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

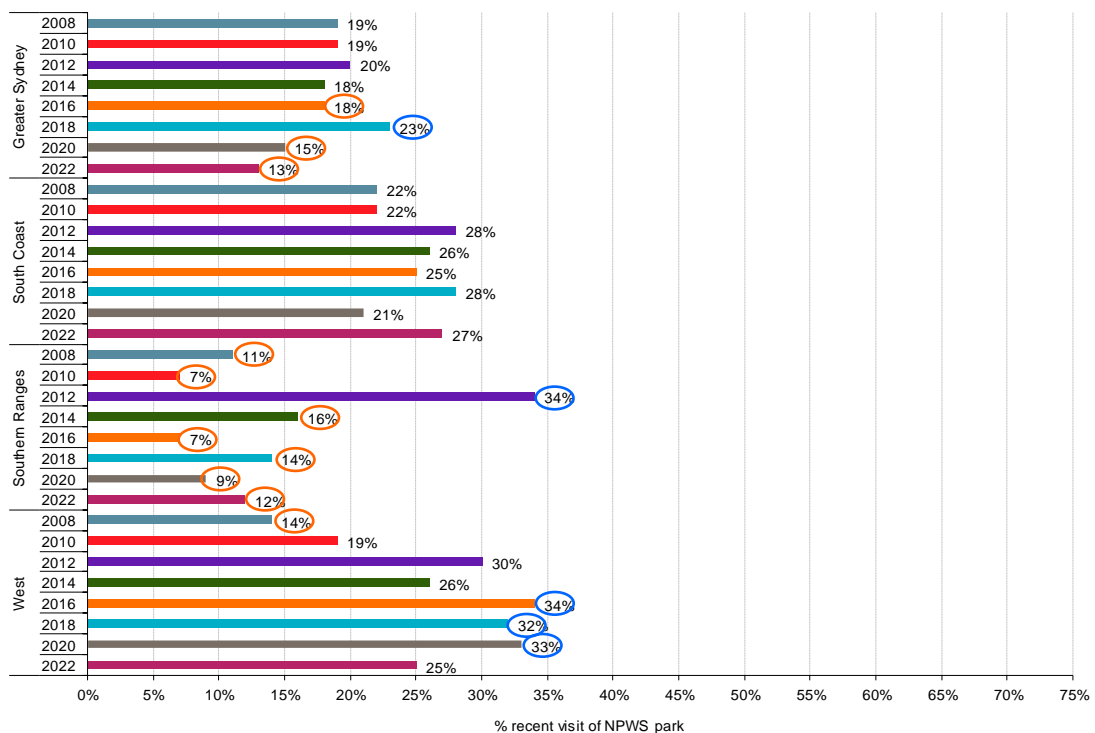
Chart 99: Water-Based Recreation Activities at Most Recently Visited NPWS Park by NPWS Branch (Pt 1)



Source: NPWS Parks Visitor Surveys – Most recent visit to a NPWS park 2008–2022  
 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; 2022 n=1,310

○ Significantly lower  
 ○ Significantly higher

Chart 100: 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 2008–2022  
 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; 2022 n=1,310

○ Significantly lower  
 ○ Significantly higher

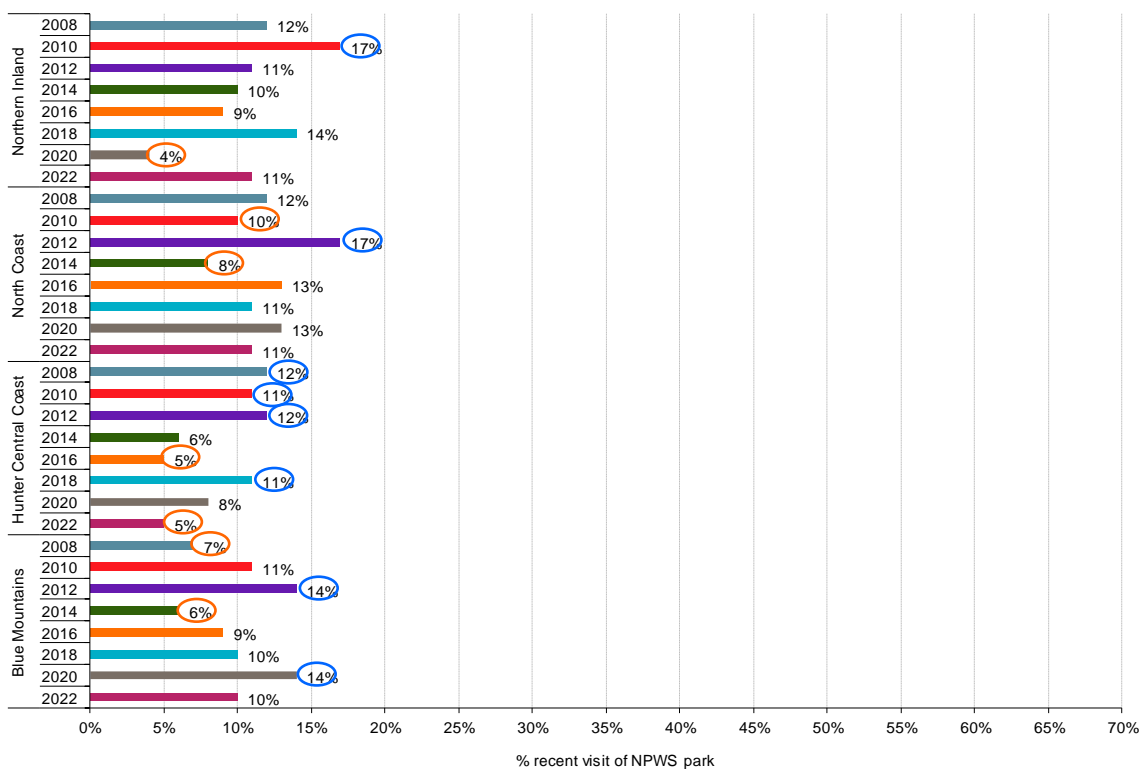
## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

Incidence of undertaking *picnicking and dining* activities was significantly low for the Hunter Central Coast Branch in 2022 (5%), equal with 2016 levels (Chart 101). However, Southern Ranges Branch recorded its highest ever incidence of *picnicking and dining* activities in 2022 (13%) – see Chart 102).

Charts 103 and 104 show that *touring and sightseeing* activities were the highest recorded in 2022 for the North Coast (18%), Blue Mountains (25%) and Southern Ranges Branches (21%). All Branches increased their proportion undertaking *Touring and sightseeing* activities in 2022 from 2020 levels, with the exception of South Coast Branch where proportions remained the same (each 17%).

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 2022 three in ten of those on their most recent visit to a NPWS park undertook *snow sports*, as was also the case in 2020 (each 31%), significantly lower than the peak observed in 2018 (45% - see Chart 105).

Chart 101: Picnicking and Dining Activities at Most Recently Visited NPWS Park by NPWS Branch (Pt 1)

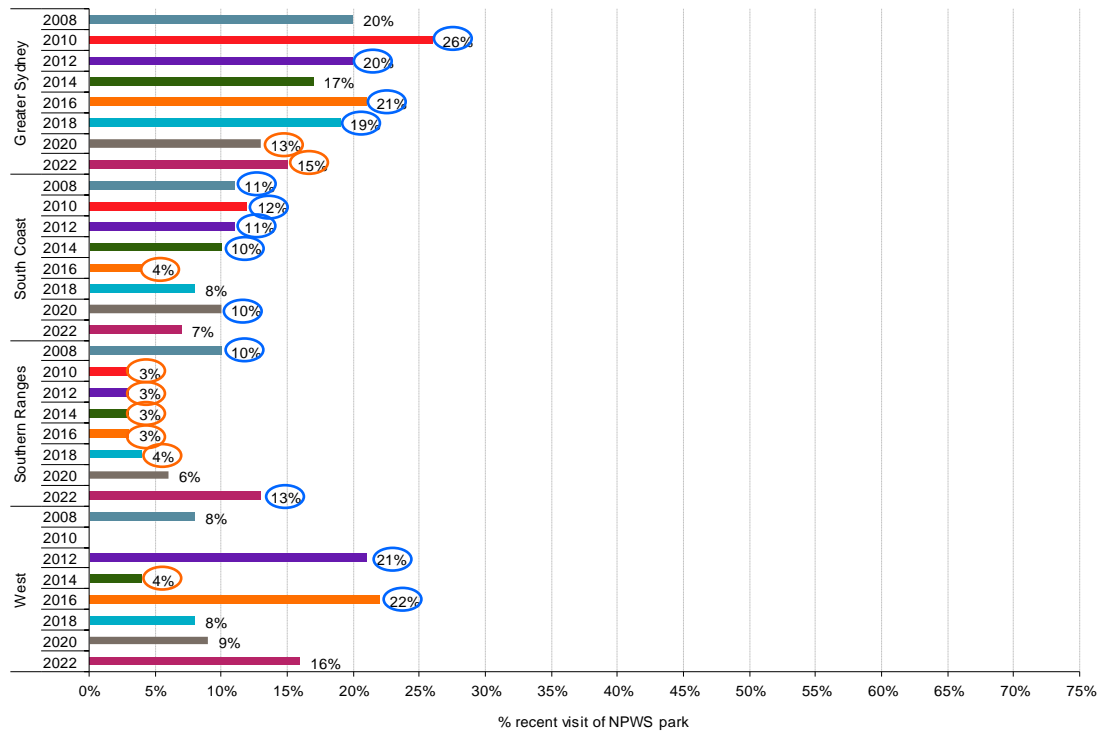


Source: NPWS Parks Visitor Surveys – Most recent visit to a NPWS park 2008–2022  
 Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582; 2018 n=1,614; 2020 n=1,017; 2022 n=1,310

○ Significantly lower  
 ○ Significantly higher

2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

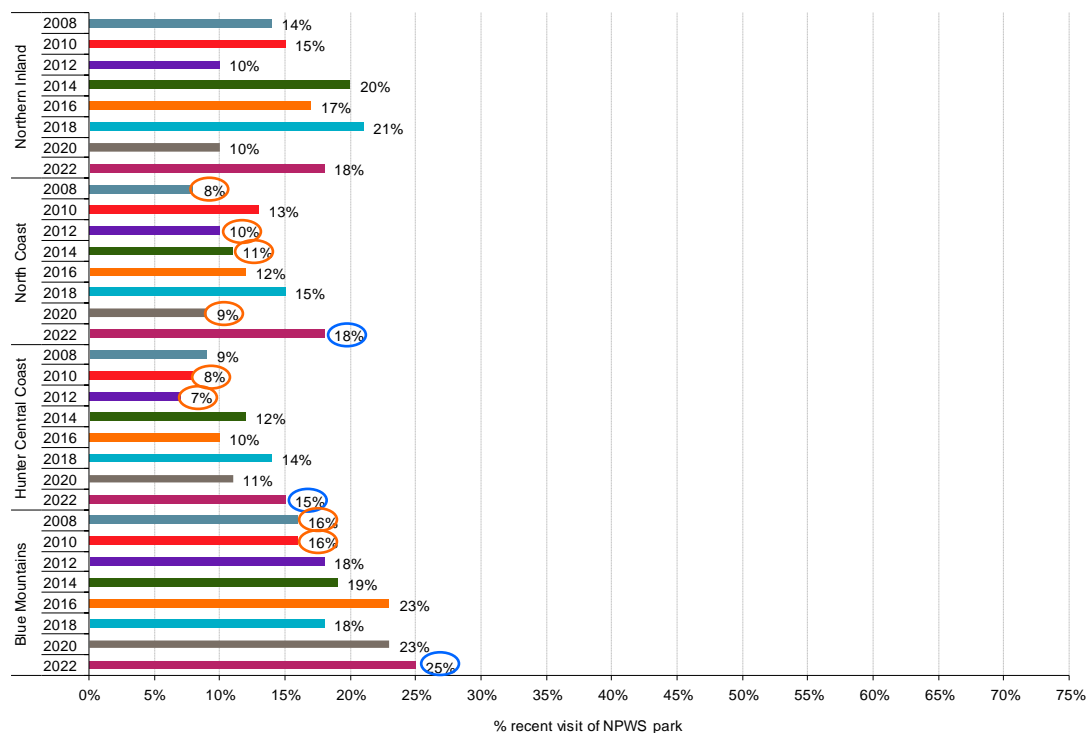
Chart 102: Picnicking and Dining Activities at Most Recently Visited NPWS Park by NPWS Branch (Pt 2)



Source: NPWS Parks Visitor Surveys – Most recent visit to a NPWS park 2008–2022  
 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; 2022 n=1,310

○ Significantly lower  
 ○ Significantly higher

Chart 103: Touring and Sightseeing Activities at Most Recently Visited NPWS Park by NPWS Branch (Pt 1)

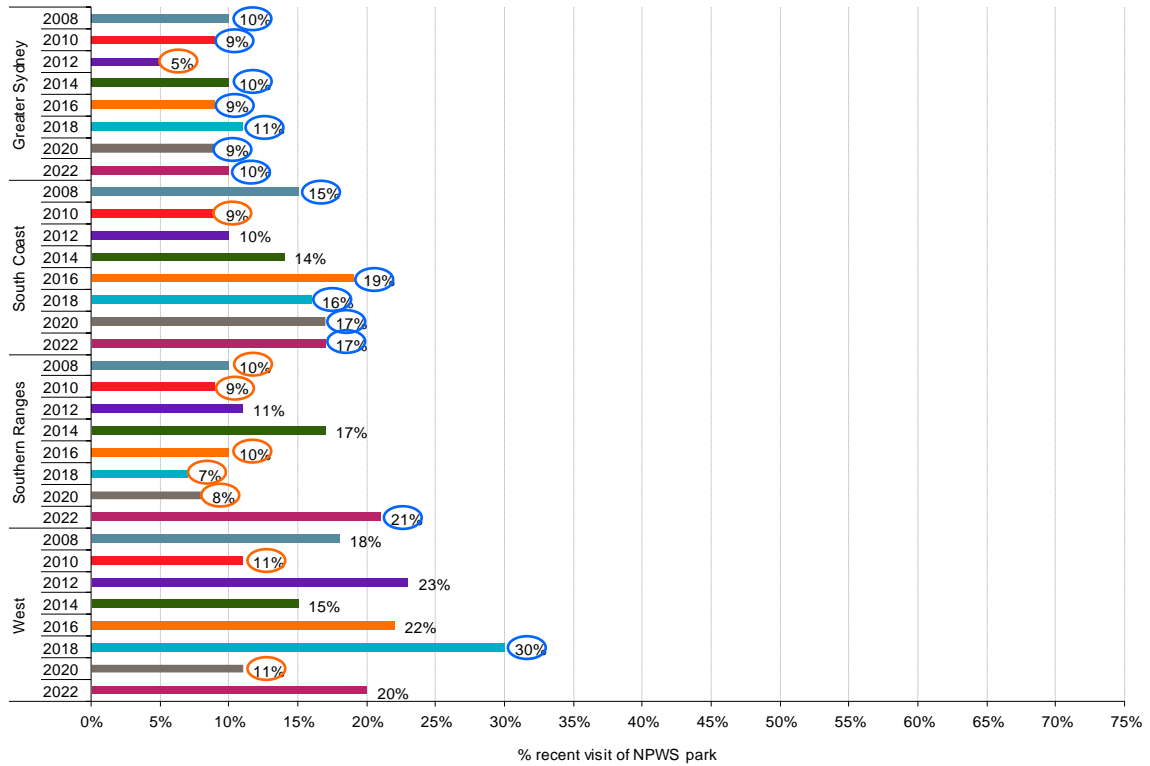


Source: NPWS Parks Visitor Surveys – Most recent visit to a NPWS park 2008–2022  
 Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582; 2018 n=1,614; 2020 n=1,017; 2022 n=1,310

○ Significantly lower  
 ○ Significantly higher

2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

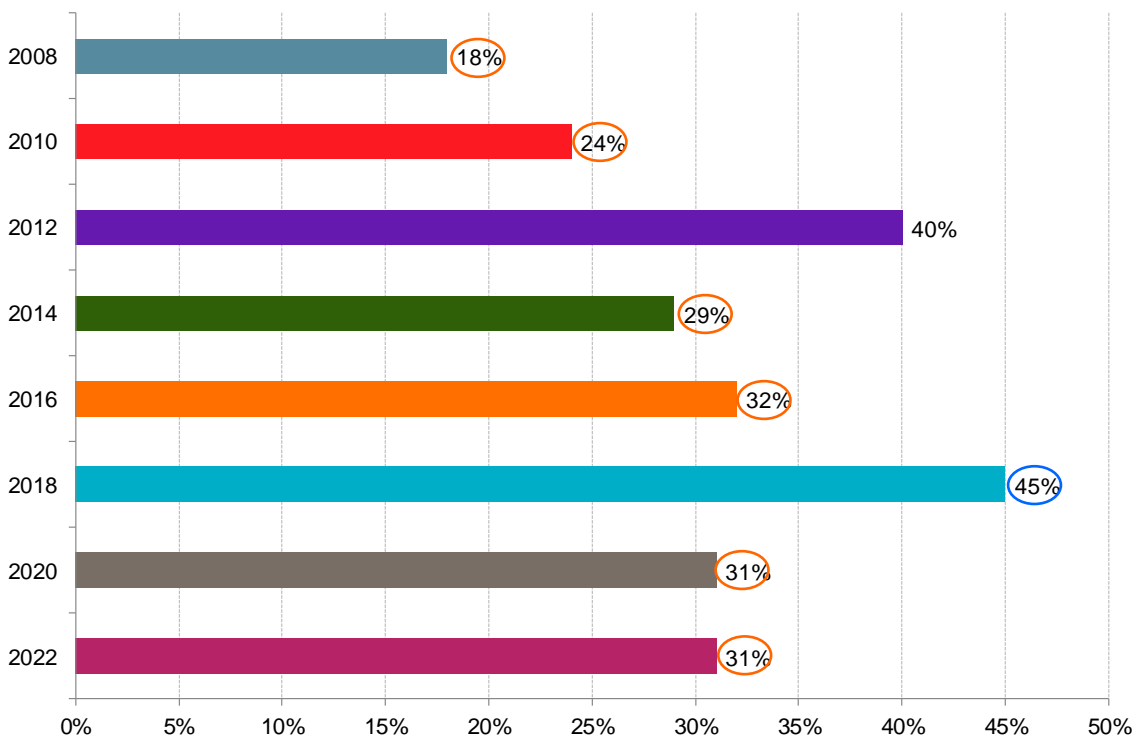
Chart 104: Touring and Sightseeing Activities at Most Recently Visited NPWS Park by NPWS Branch (Pt 2)



Source: NPWS Parks Visitor Surveys – Most recent visit to a NPWS park 2008–2022  
 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; 2022 n=1,310

○ Significantly lower  
 ○ Significantly higher

Chart 105: 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 2008–2022  
 Base: 2008 n=199; 2010 n=128; 2012 n=131; 2014 n=152; 2016 n=165; 2018 n=155; 2020 n=91; 2022 n=137

○ Significantly lower  
 ○ Significantly higher

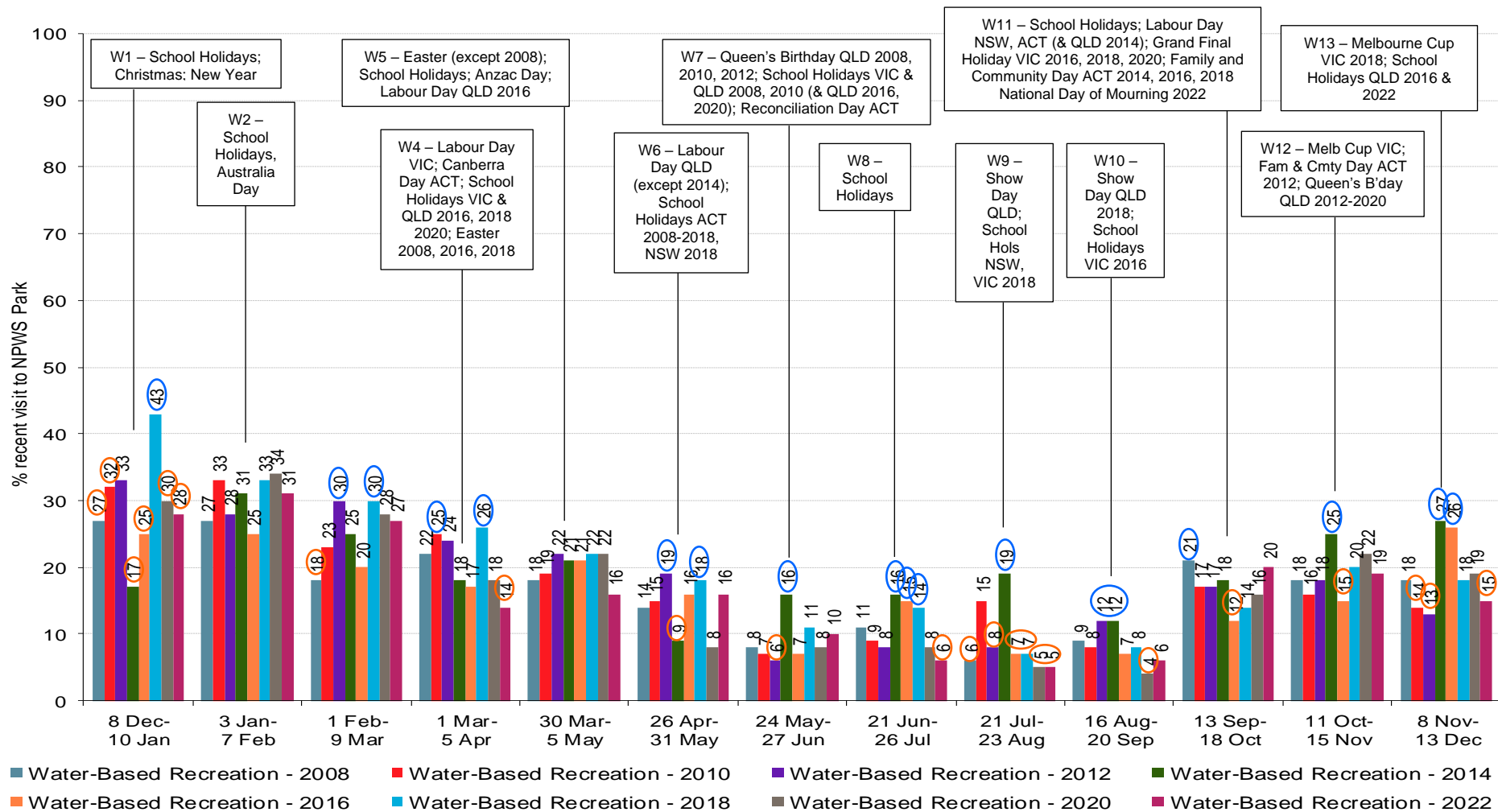
## **2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

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 30% on average) and relatively high during February to April (waves 3-5 – Easter and school holidays - around 22% on average), then declines to very low proportions from wave 6 to wave 10 (late-April to mid-September – around 10% on average) and then rises to average levels in waves 11 to 13 (Mid-September-early-December – around 18%). 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 106).

In 2022 incidence of *water-based activities* was around the average from December 2021 to early February 2022 (30% - waves 1-2) and from mid-September to mid-December 2022 (18% - waves 11-13). However, visits were well below average from February to April (19% - waves 3-5) and slightly below average from May to mid-September (9% - waves 6-10).

*Water-based activities* declined in 2022 from 2020 levels for waves 1 to 5, wave 8 and waves 12-13. Incidence in 2022 increased from 2020 levels in waves 6-7 and waves 10-11.

Chart 106: 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 2008–2022  
 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



## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

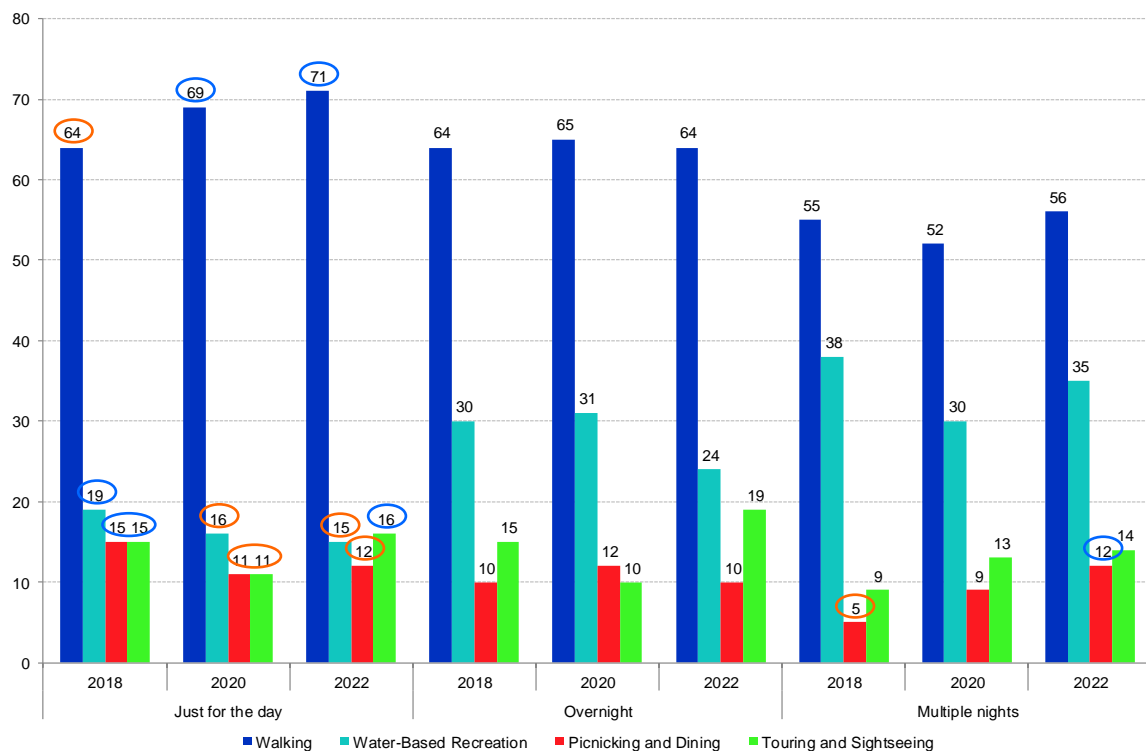
Chart 107 shows that *walking* was equally prevalent for *day trips* and *overnight trips* in 2018 (each 64%), but while still high for *overnight trips* in 2022 (64%), *walking* was significantly higher for *day trips* in 2022 (71%). *Walking* was less common for park visits of *multiple nights* (55% - 2018; 52% - 2020; 56% - 2022), 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 remains valid in 2022 (just for the day – 15%; overnight – 24%; multiple nights – 35%). Undertaking *water-based recreation* in the context of *just for the day* trips was significantly lower in both 2022 and 2020 than in 2018 (15%, 16% and 19% respectively).

*Picnicking and dining* activities are growing for those undertaking *multiple night* trips to NPWS parks, with proportions increasing from 5% in 2018 to 12% in 2022. Similarly, *touring and sightseeing* activities are also increasing over time for those taking multiple night trips to NPWS parks (9% in 2018 to 14% in 2022).

Not surprisingly, undertaking *snow sports* is significantly higher among those visiting an NPWS park as part of a *multiple night* trip (11.4% - 2018; 12.0% - 2020; 13.5% - 2022) than *shorter trips* (2.1% - 2018; 0.7% - 2020; 1.2% - 2022) - not shown on chart).

Chart 107: Main Activities at Most Recently Visited NPWS Park by Duration of Trip



Source: NPWS Parks Visitor Surveys 2018-2022  
 Base: 2018 n=1,614; 2020 n=1,117; 2022 n=1,310

○ Significantly lower  
 ○ Significantly higher

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

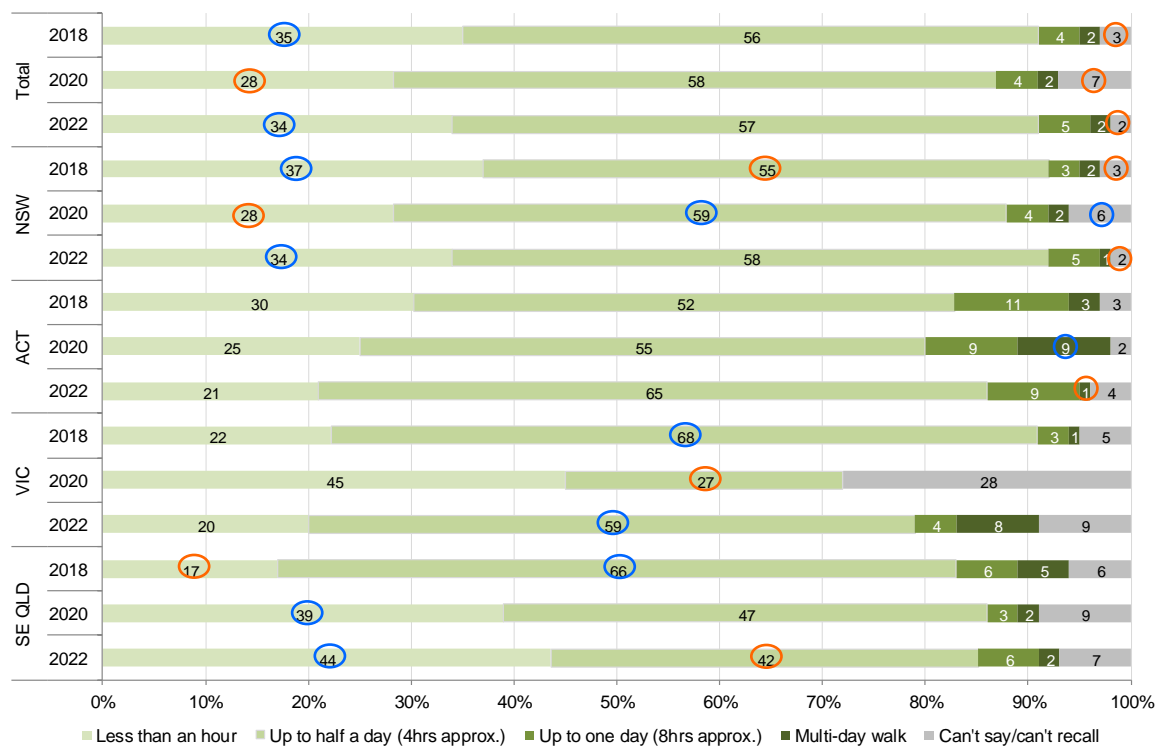
In 2018, 2020 and 2022 a new question was asked of those people who had undertaken walking, bushwalking or walking the dog on their most recent visit to a NPWS park.

*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 and 2022, 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 and 2022 (35% and 34% respectively). In all years 20 more than half walked for *up to half a day* (approximately 4 hours – 56% - 2018; 58% - 2020; 57% - 2022 - Chart 108). There is no trend in walk length by region of origin over time.

In 2022 the highest proportion of people walking for *less than an hour* were people from Southeast QLD (44%), followed by people from NSW (34%), people from ACT (21%) and Victorians (20%). Up to *half day* trips were more commonly undertaken in 2022 by people from ACT (65%), then Victorians (59%), people from NSW (58%) and people from Southeast QLD (42%).

Chart 108: Length of Walk by State of Origin



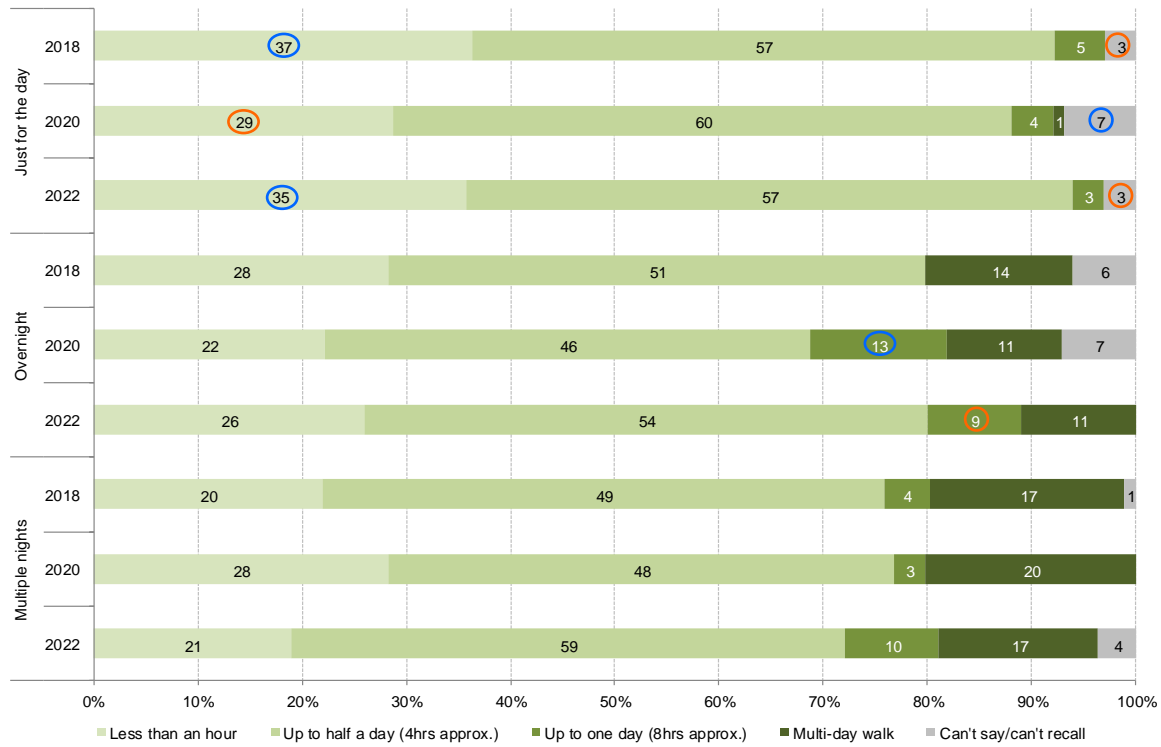
Source: NPWS Parks Visitor Surveys 2018-2022  
Base: 2018 n=1,016; 2020 n= 752; 2022 n=888

○ Significantly lower  
○ Significantly higher

Not surprisingly duration of visit to an NPWS park impacted on length of walk (Chart 109). Across all years, those visiting for *multiple nights* had the longest walking length and those visiting *just for the day* had the shortest walking length.

Walk length tended to be slightly longer in 2020 for those undertaking visits *just for the day* and *overnight*. However, in 2022 walk length for these groups returned to 2018 levels.

Chart 109: Length of Walk by Duration of NPWS Park Visit



Source: NPWS Parks Visitor Surveys 2018-2022  
 Base: 2018 n=1,016; 2020 n=752; 2022 n=888

○ 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 110 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%. The proportion *very satisfied* was the highest recorded in 2022 (66%). 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% and 92% respectively in 2020 and 2022. The 2008 figure of 90% is significantly lower than all other years.

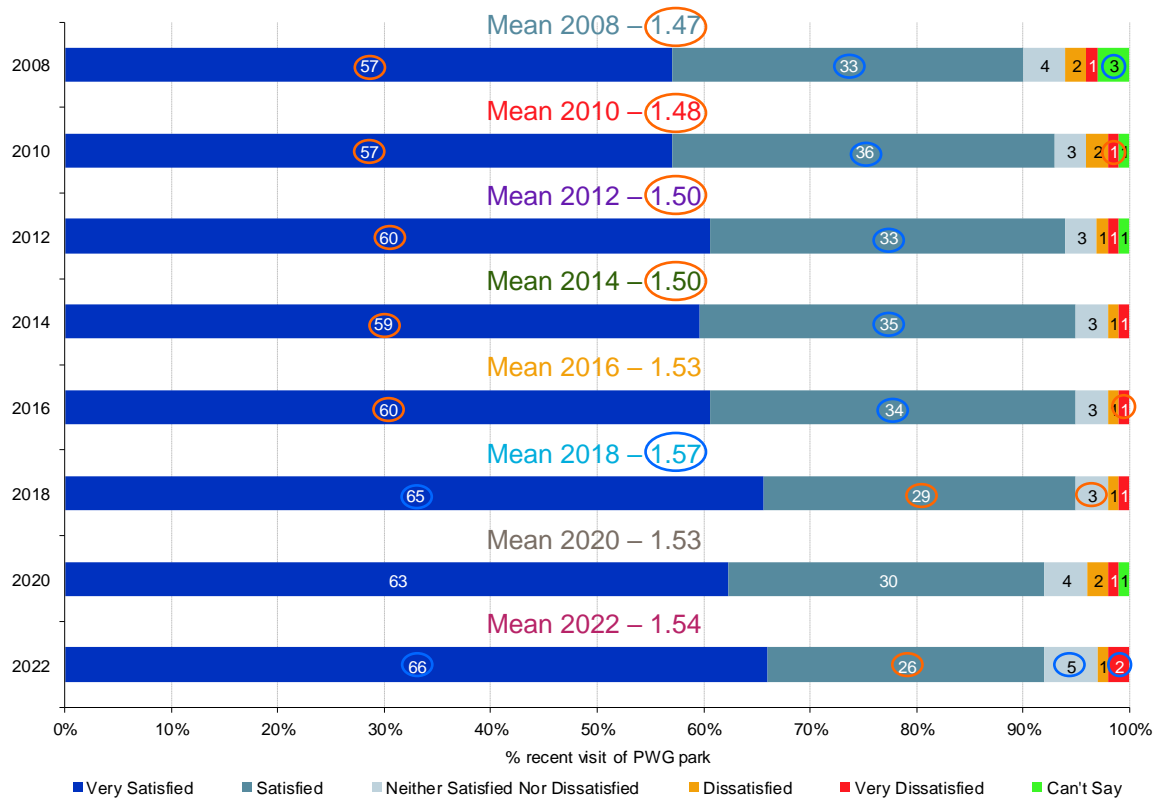
For all years *mean satisfaction* was calculated using the following scores:

- 2 points – Very satisfied
- 1 point – Satisfied
- 0 points – Neither satisfied nor dissatisfied
- -1 point – Dissatisfied
- -2 points – Very Dissatisfied

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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) and increased marginally to 1.54 in 2022.

Chart 110: Satisfaction with Experience at Most Recently Visited NPWS Park



Source: NPWS Parks Visitor Surveys – NPWS park most recently visited 2008–2022

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; 2022 n=1,310

○ Significantly lower  
○ Significantly higher

The proportion *very satisfied* with their park experience is the highest recorded in 2022 amongst visitors from Remainder of southern QLD (80%), Remainder VIC (76%) and Sydney.

*Mean scores* for satisfaction in 2022 varied by region, with Sydney (1.59), Remainder VIC (1.61) and Remainder SE QLD (1.73 – highest recorded) all increasing from 2020 levels, while mean scores declined from 2020 levels for Remainder NSW (1.43), ACT (1.43), Melbourne (1.51) and Brisbane (1.45).

Table 29 shows satisfaction by intrastate/interstate location. Visitors from intrastate and interstate recorded the same *mean score* for satisfaction in 2022 (1.54 each), with interstate visits attaining their highest proportion recorded for being *very satisfied* with their recent park visits (69%). Intrastate visitors equalled the highest very satisfied score recorded in 2022 (65%), also attained in 2018.

2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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%	1%	95%	1.59
	2020	64%	29%	4%	1%	1%	1%	93%	1.55
2022	67%	27%	4%	1%	1%	*	94%	1.59	
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
2022	61%	27%	7%	2%	2%	*	88%	1.43	
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%	3%	-	-	95%	1.55
	2018	71%	23%	4%	2%	*	-	94%	1.63
	2020	65%	26%	4%	-	2%	2%	92%	1.57
2022	63%	28%	3%	4%	3%	-	91%	1.43	
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%	-	-	8%	81%	1.59
2022	59%	33%	8%	-	-	-	92%	1.51	
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
2022	76%	19%	-	1%	-	-	95%	1.61	
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
2022	71%	16%	4%	5%	4%	-	87%	1.45	
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
2022	80%	17%	-	1%	1%	3%	97%	1.73	

Source: NPWS Parks Visitor Surveys – NPWS park most recently visited 2008–2022  
 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; 2022 n=1,310

Table 29: Satisfaction with Most Recently Visited NPWS Park by Intrastate/Interstate

Region of Origin	Year	Very Satisfied	Satisfied	Neither Satisfied nor Dissatisfied	Dis-satisfied	Very Dissatisfied	Can't Say	Total Satisfied	Mean
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%	2%	*	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
	2022	65%	27%	5%	1%	2%	*	92%	1.54
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
	2022	69%	23%	3%	2%	2%	-	92%	1.54

Source: NPWS Parks Visitor Surveys – NPWS park most recently visited 2008–2022  
 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; 2022 n=1,310

Table 30 shows that females tend to have slightly higher levels of satisfaction with their recent experience at a NPWS park than do males. While the *mean satisfaction* rating for males have hovered around 1.44 for all years excepting 2018 and 2022 for males, the mean score for females hovered around 1.53 from 2008 to 2014 and increased to around 1.62-1.63 from 2016 to 2020. In 2022, the mean score males increased significantly to 1.53, slightly lower than that of females (1.56). Males also recorded their highest proportion *very satisfied* with their park experience in 2022 (65%), significantly higher than all years except 2018.

Table 30: 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
	2022	65%	27%	4%	1%	2%	-	92%	1.53
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
	2022	66%	26%	5%	1%	1%	-	93%	1.56

Source: NPWS Parks Visitor Surveys – NPWS park most recently visited 2008–2022  
 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; 2022 n=1,310

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

Table 31 shows that the general trend by age for satisfaction with one's park visit experience from is that satisfaction increases with age (2018 and 2022 being the only exceptions). In 2020, 64% of 18-24 year olds and 65% of 35-49 year olds were *very satisfied* with the park experience, the second highest recorded for these age groups. Similarly, 63% of 25-34 year olds were *very satisfied*, the highest proportion recorded for this age group, while 68% of those aged 50 years and over were *very satisfied*, the equal highest score recorded for this age group (also in 2018).

Table 31: 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
	2022	64%	32%	2%	=	2%	-	96%	1.56
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
	2022	63%	30%	4%	1%	1%	1%	93%	1.53
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
	2022	65%	27%	6%	1%	2%	-	92%	1.52
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
	2022	68%	23%	5%	2%	2%	-	92%	1.56

Source: NPWS Parks Visitor Surveys – NPWS park most recently visited 2008–2022

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; 2022 n=1,310

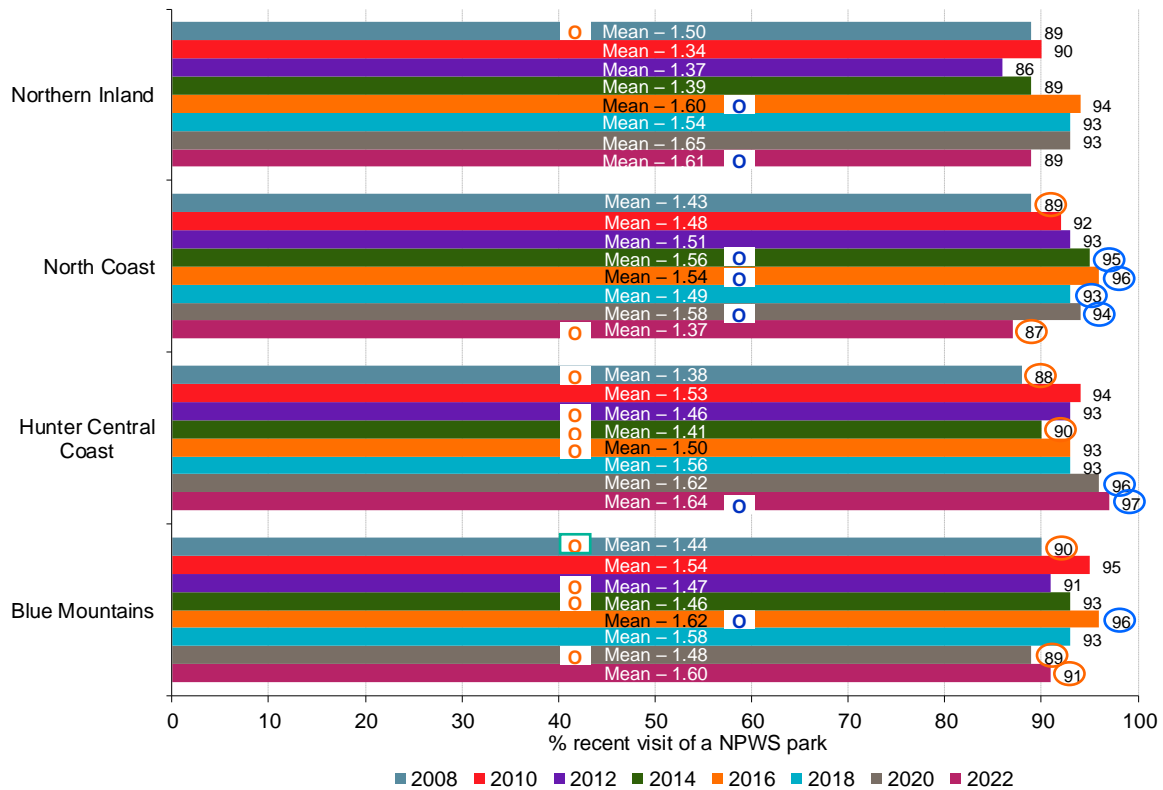
Analysis by NPWS Branch has only been provided for *overall satisfaction* (i.e. satisfied + very satisfied) and is detailed in Chart 126 and Chart 127.

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

In 2022 *Mean satisfaction scores* for Hunter Central Coast (1.64) and Greater Sydney Branch (1.59) were the highest recorded. However, the *mean score* for the South Coast Branch was the lowest recorded (1.45 – See Charts 111 and 112). However, the lowest *mean score* was recorded for North Coast Branch in 2022 (1.37)

The proportion *total satisfied* (i.e. very satisfied + satisfied = overall satisfaction) was the highest recorded for Hunter Central Coast Branch in 2022 (97%).

**Chart 111: Satisfaction with Most Recently Visited NPWS Park by Branch (Part 1)**

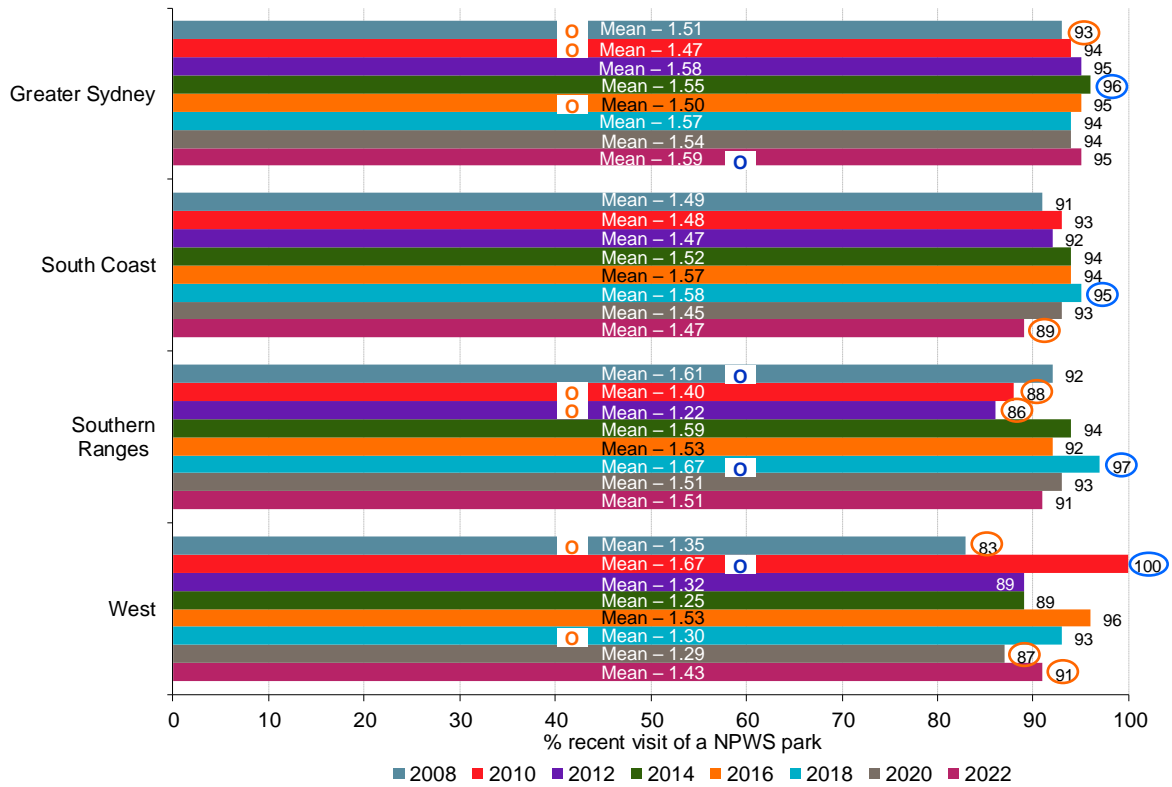


Source: NPWS Parks Visitor Surveys – NPWS park most recently visited 2008–2022.  
 Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582; 2018 n=1,614; 2020 n= 1,117; 2022 n=1,310  
 Analysis by NPWS Branch has only been provided for *overall satisfaction* (i.e. satisfied + very satisfied).

○ Significantly lower  
 ○ Significantly higher



Chart 112: Satisfaction with Most Recently Visited NPWS Park by Branch (Part 2)



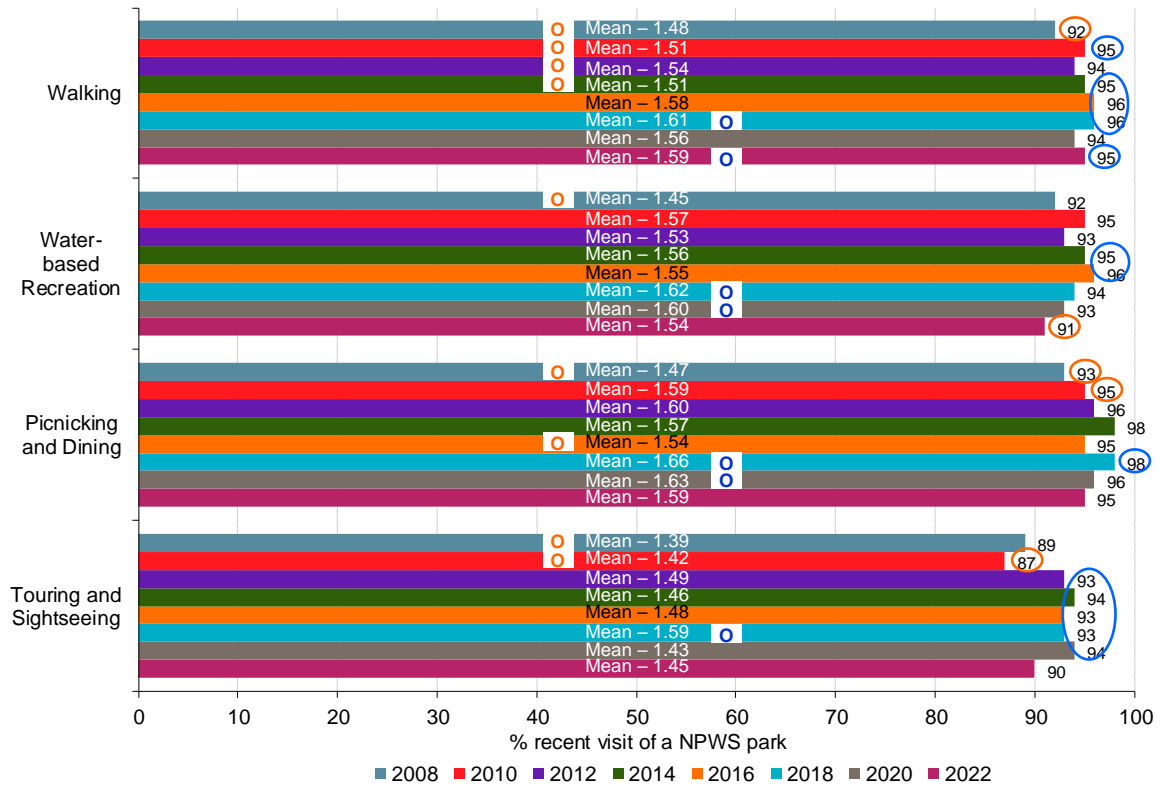
Source: NPWS Parks Visitor Surveys – NPWS park most recently visited 2008–2022  
 Base: 2008 n=1,487; 2010 n=1,341; 2012 n=1,357; 2014 n=1,555; 2016 n=1,582; 2018 n=1,614; 2020 n= 1,117  
 Analysis by NPWS Branch has only been provided for overall satisfaction (i.e. satisfied + very satisfied).

○ Significantly lower  
 ○ Significantly higher

Slight declines from 2020 levels in overall satisfaction with one’s most recent NPWS park visit were observed in 2022 for undertaking water-based recreation activities (91%) picnicking and dining activities (95% and touring and sightseeing activities (90%). Only walking activities recorded an increase in overall satisfaction in 2022 when compared with 2020 levels (95% - see Chart 113).

However, mean satisfaction scores in 2022 were marginally higher than those observed in 2020 for those undertaking walking (1.59) and touring and sightseeing activities (1.45). Declines from 2020 levels in mean scores were observed in 2022 for undertaking water-based recreation (1.54) and picnicking and dining activities (1.59).

Chart 113: 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

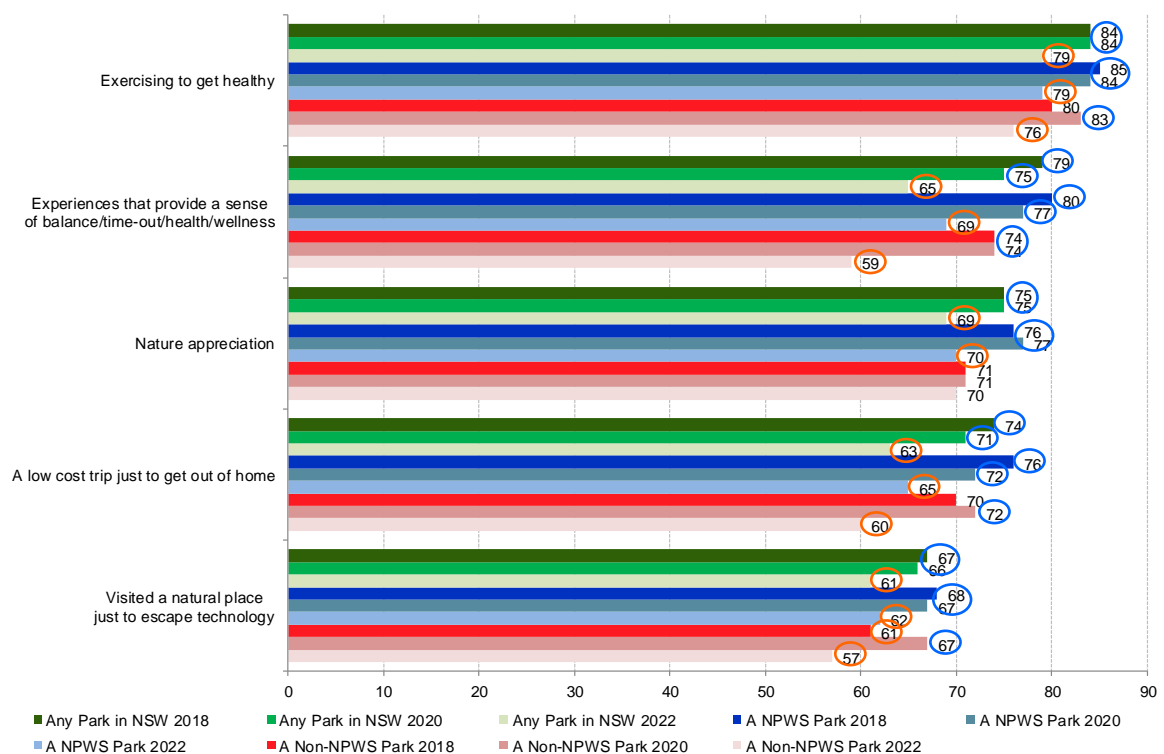
## 9. Park Visitor Needs Based Segmentation

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, 2020 and 2022 NSW Parks Visitor Surveys, these questions were asked of all visitors to a park in NSW in the last 4 weeks (along with another question to assess likelihood of taking a day trip to NSW National Parks in the next 12 months) to enable a comparison of park visitors with the general population.

Charts 114 to 116 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 2018, 2020 and 2022. 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.

For all activities asked, proportions in 2022 were lower than those observed in both 2018 and 2020 and for most activities declines were statistically significant. In 2018 respondents on average nominated 8.5 activities, in 2020 8.1 and in 2022 just 7.1, which in may explain this decline – people are undertaking fewer activities in 2022 than they were in the past.

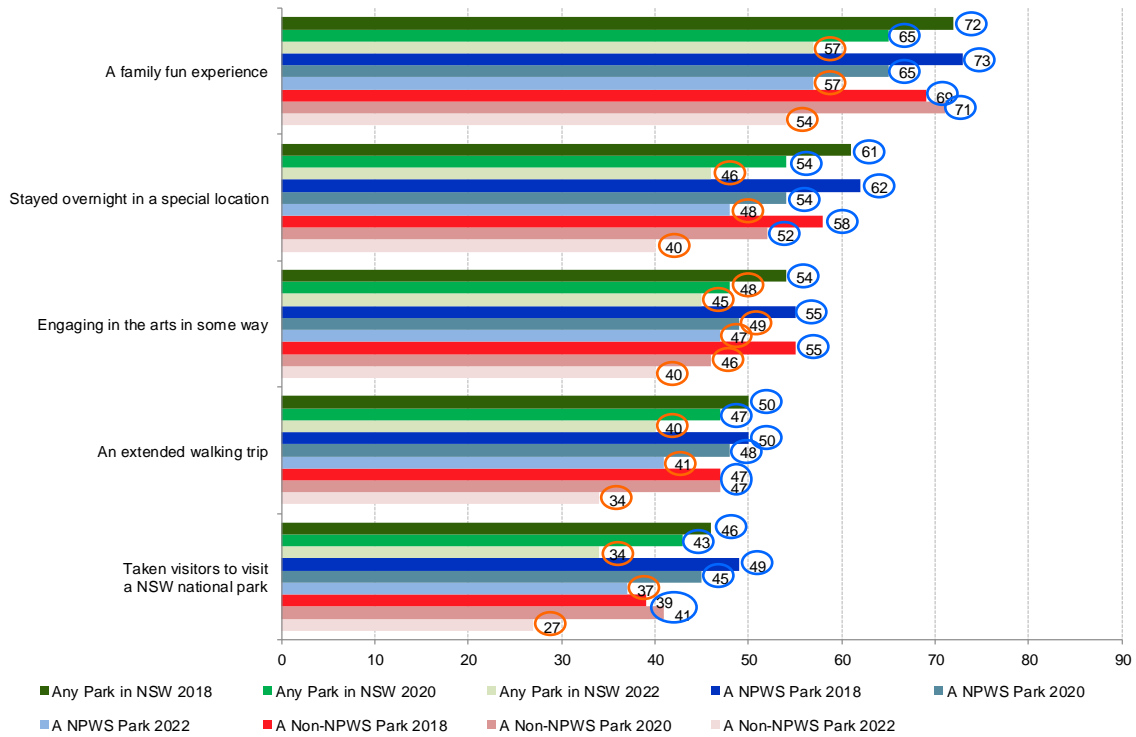
Chart 114: Activities Undertaken for Leisure Purposes in the Last 12 months – Part 1



Source: NPWS Parks Visitor Surveys 2018-2022 – Visited a park in NSW in the last 4 weeks  
 Base: 2018 - n=2,094; 2020 n= 1,450; 2022 1,629

○ Significantly lower  
 ○ Significantly higher

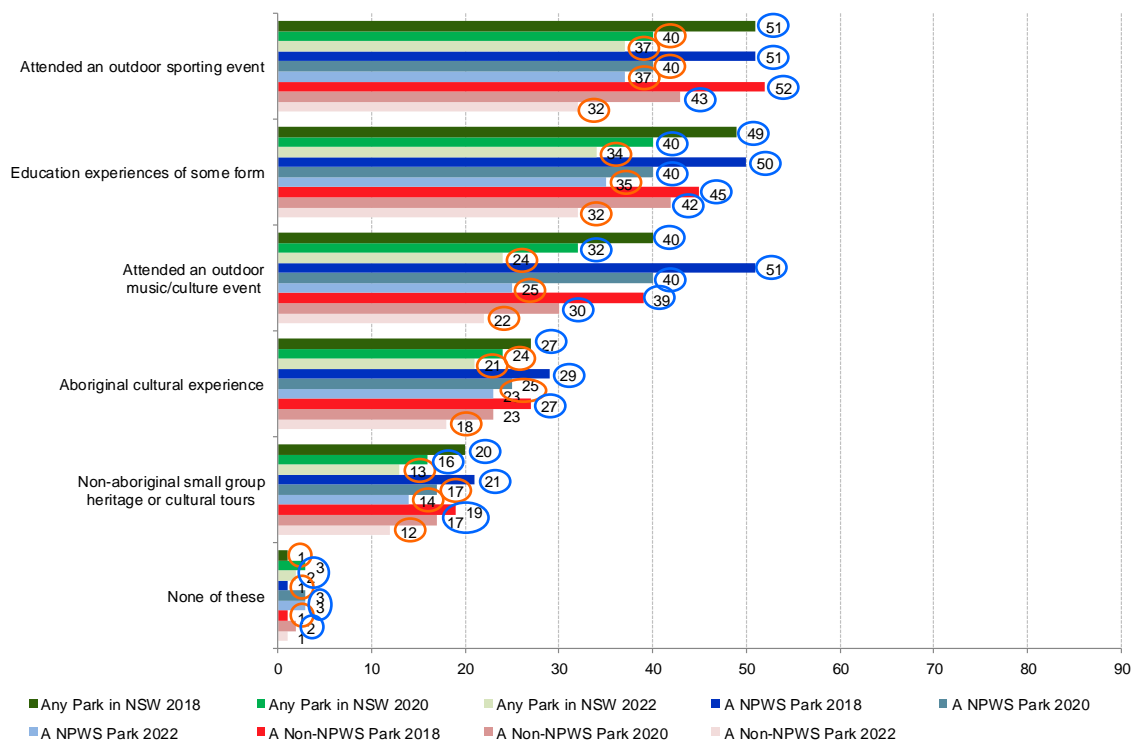
Chart 115: Activities Undertaken for Leisure Purposes in the Last 12 months – Part 2



Source: NPWS Parks Visitor Surveys 2018-2022 – Visited a park in NSW in the last 4 weeks  
 Base: 2018 - n=2,094; 2020 n= 1,450; 2022 n=1,629

○ Significantly lower  
 ○ Significantly higher

Chart 116: Activities Undertaken for Leisure Purposes in the Last 12 months – Part 3



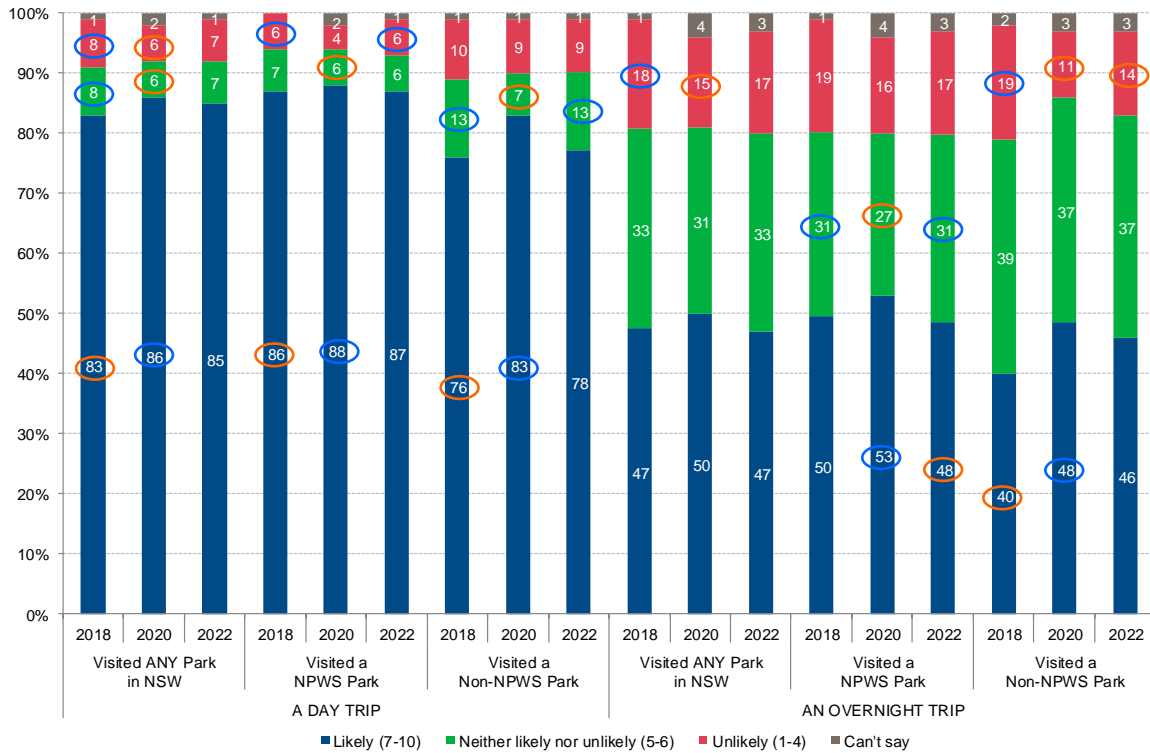
Source: NPWS Parks Visitor Surveys 2018-2022 – Visited a park in NSW in the last 4 weeks  
 Base: 2018 - n=2,094; 2020 n= 1,450; 2,022 n=1,629

○ Significantly lower  
 ○ Significantly higher

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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 from 2018 to 2022 claiming that were likely to visit for both a *day trip* (86% - 2018; 88% - 2020; 87% - 2022) and for an *overnight trip* (50% - 2018; 53% - 2020; 48%) than those who had visited a non-NPWS park.

Chart 117: Likelihood if taking a day trip or an overnight trip to a NSW National Park in the next 12 months

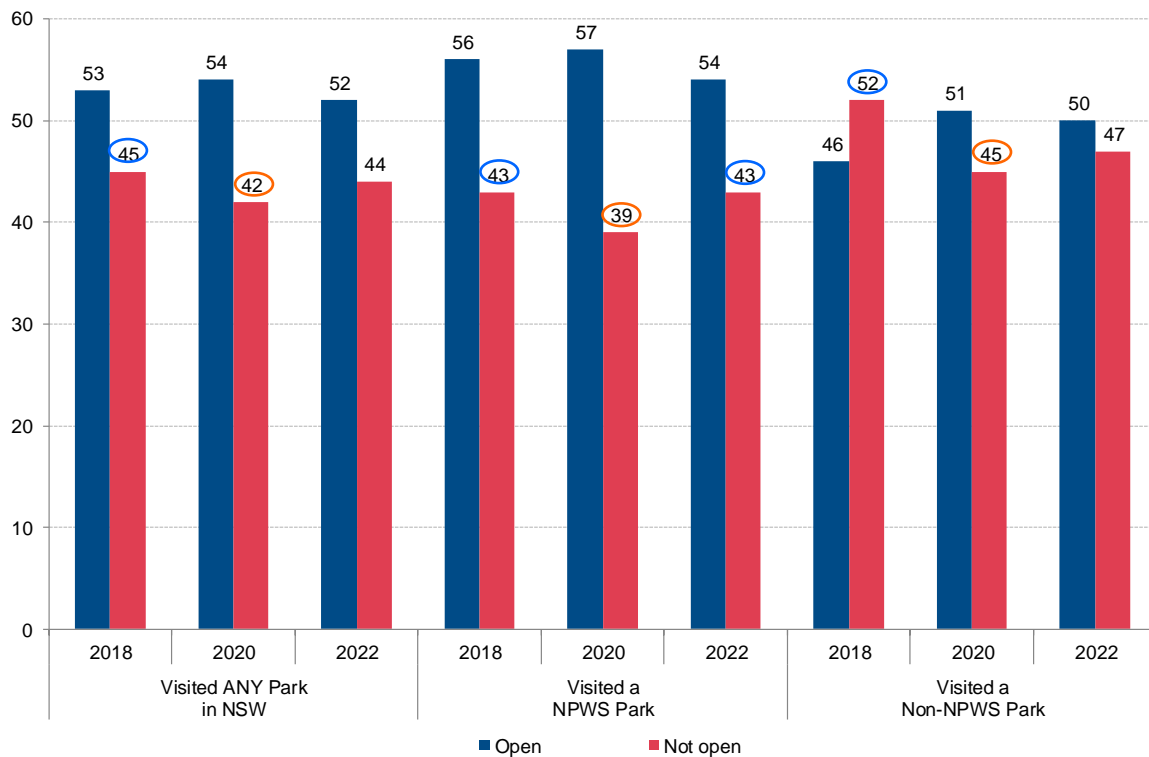


Source: NPWS Parks Visitor Surveys 2018-2022 – Visited a park in NSW in the last 4 weeks  
 Base: 2018 - n=2,094; 2020 n= 1,450; 2022 n=1,629

○ 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 118 shows that those that have visited an NPWS park in the last 4 weeks in 2018, 2020 and 2022 (56%, 57% and 54% respectively) were more likely than those who had visited a non-NPWS park (52%, 51% and 50% respectively) to be *open* to an overnight trip to a NSW National park in the next 12 months.

Chart 118: Open or not open to overnight trip to a NSW National Park in the next 12 months



Source: NPWS Parks Visitor Surveys 2018-2022 – Visited a park in NSW in the last 4 weeks  
 Base: 2018 - n=2,094; 2020 n= 1,450; 2022 n=1,629

○ 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 119). From 2018 to 2022 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.

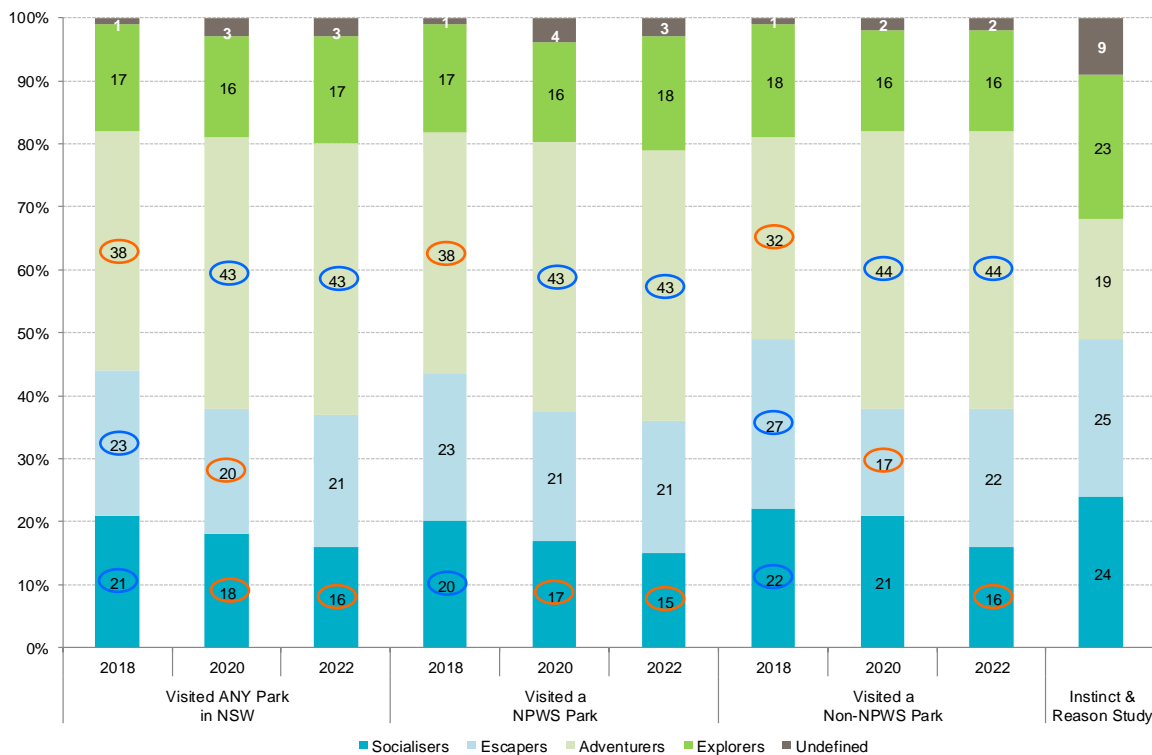
*Adventurers* are looking for parks to provide venues where they can do their own thing, be spontaneous and independent, where they can be with nature and where walking is great.

*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 119: Core Segments



Source: NPWS Parks Visitor Surveys 2018-2022 – 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; 2022 n=1,629; 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. They 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.

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

*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. They have a keen desire to visit, but need reasons to get parks into the diary. They need great accommodation options with associated discovery experiences.

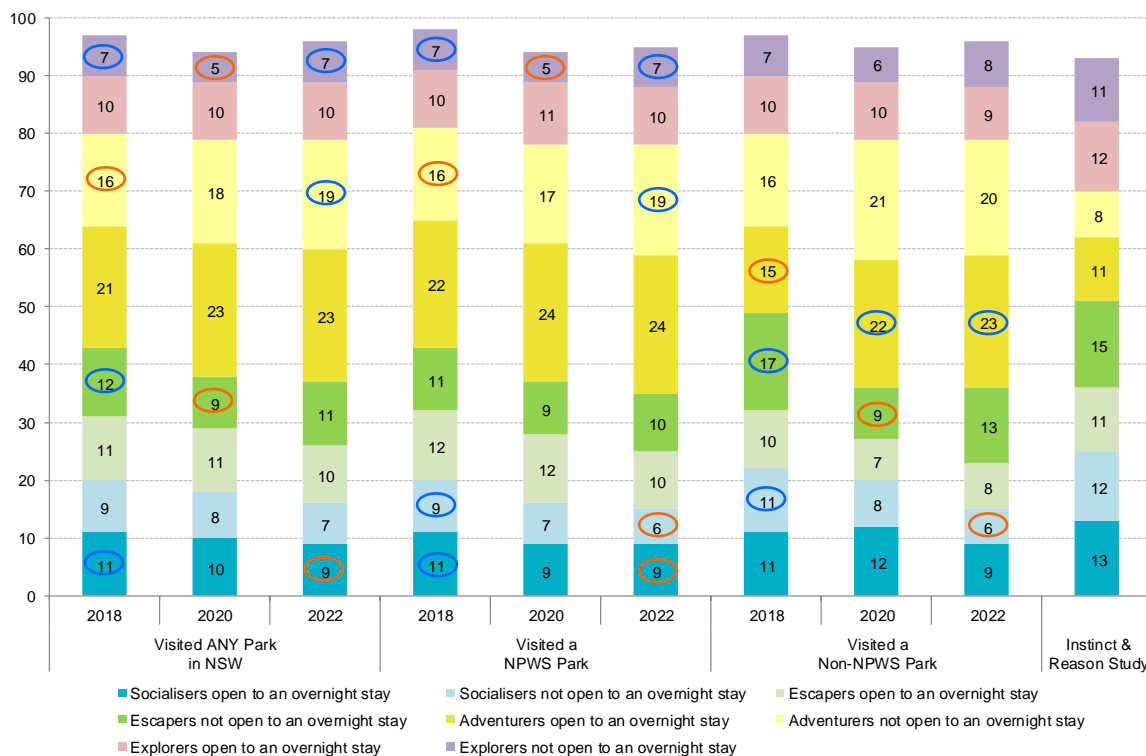
*Escapers not open to an overnight stay* are aged 50-54, retired, poorer with lower education and lower interest and knowledge of national parks. They need low cost discovery experiences that last a day or less and are easy to take part in.

Chart 120 shows that the proportion of *Escapers not open to an overnight stay* has significantly declined from 2018 to 2022 for those who have visited any park in NSW in the last 4 weeks (11% to 10% to 9%).

For those visiting NPWS parks there has been slight growth from 2018 to 2022 among *Adventurers open to an overnight stay* (22% to 24% to 24%) and *Adventurers not open to an overnight stay* (16% to 17% to 19% - significant increase).

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 120: 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; 2022 n=1,629; Instinct and Reason Study – n=2,542

○ Significantly lower  
 ○ Significantly higher



## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

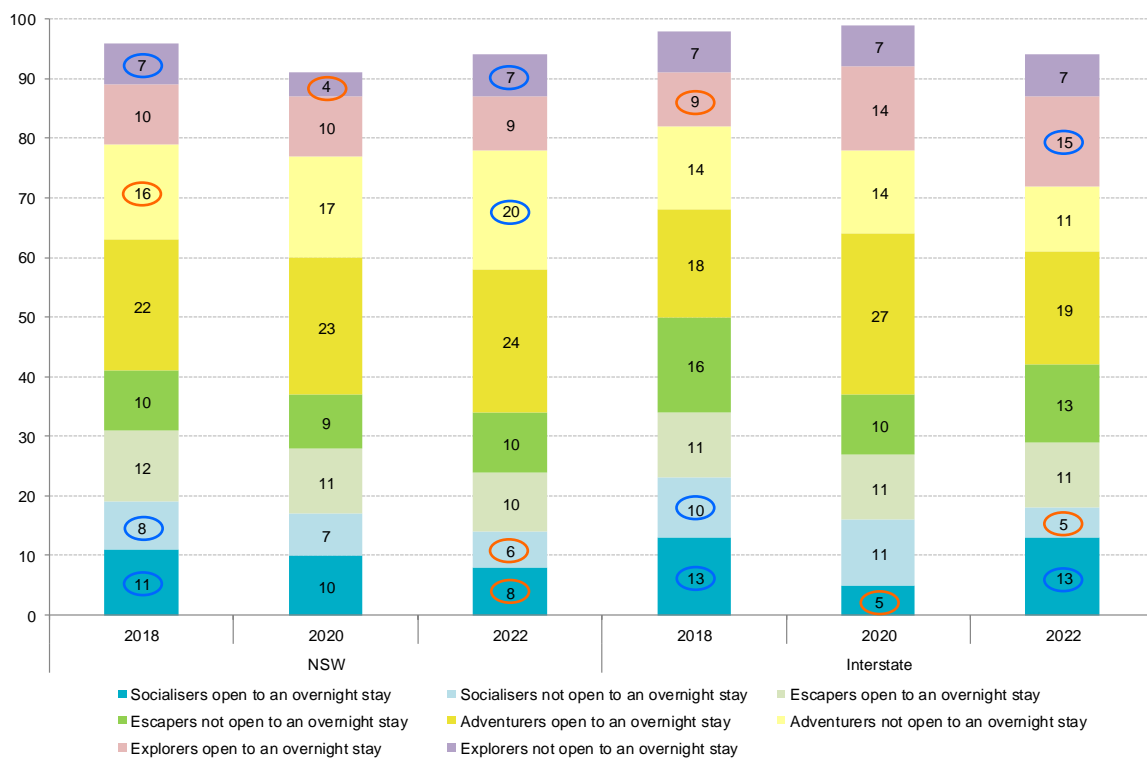
When analysed by region of origin (intrastate versus interstate) the proportion of *Socialisers open to an overnight stay* has significantly declined from 2018 to 2022 (11% to 8%) for those living in NSW, while a similar decline was evident for interstate park visitors from 2018 to 2022 (13% to 5%), but rebounded in 2022 (13%). The proportion of *Socialisers not open to an overnight stay* has declined from 2018 to 2022, for both intrastate (8% to 6%) and interstate visitors (10% to 5%).

The proportion of *Escapers open to an overnight stay* has declined from 12% in 2018 to 10% in 2022 for intrastate visitors, but has been stable at 11% for interstate visitors over the same period. Proportions of *Escapers not open to an overnight stay* has remained relatively stable over time for both interstate and intrastate visitors to NPWS parks.

The largest segment for NPWS visitors is *Adventurers open to an overnight stay*. Proportions in this segment have increased from 22% 2018 to 24% in 2022 for intrastate visitors, but for interstate visitors proportions have returned to 2018 levels In 2020 (19%) from a peak of 27% in 2020. *Adventurers not open to an overnight stay* have increased significantly for intrastate visitors from 15% in 2018 to 20% in 2022. However, there has been a decline in proportions in this segment for interstate visitors from 14% in both 2018 and 2020 to 11% in 2022.

Proportions of *Explorers open to an overnight stay* have been stable over time for intrastate visitors, but have increased from 9% in 2018 to 15% in 2022 for interstate visitors. The proportions of *Explorers not open to an overnight stay* been generally stable from both intrastate and interstate visitors from 2018 to 2022 (see Chart 121).

Chart 121: Core Sub-segments by Intrastate/Interstate Origin (NPWS Park Visitors)



Source: NPWS Parks Visitor Surveys 2018-2020 – Visited a NPWS park in the last 4 weeks  
Base: 2018; n=1,718; 2020, 1,178; 2022 n=1,382

○ Significantly lower  
○ Significantly higher

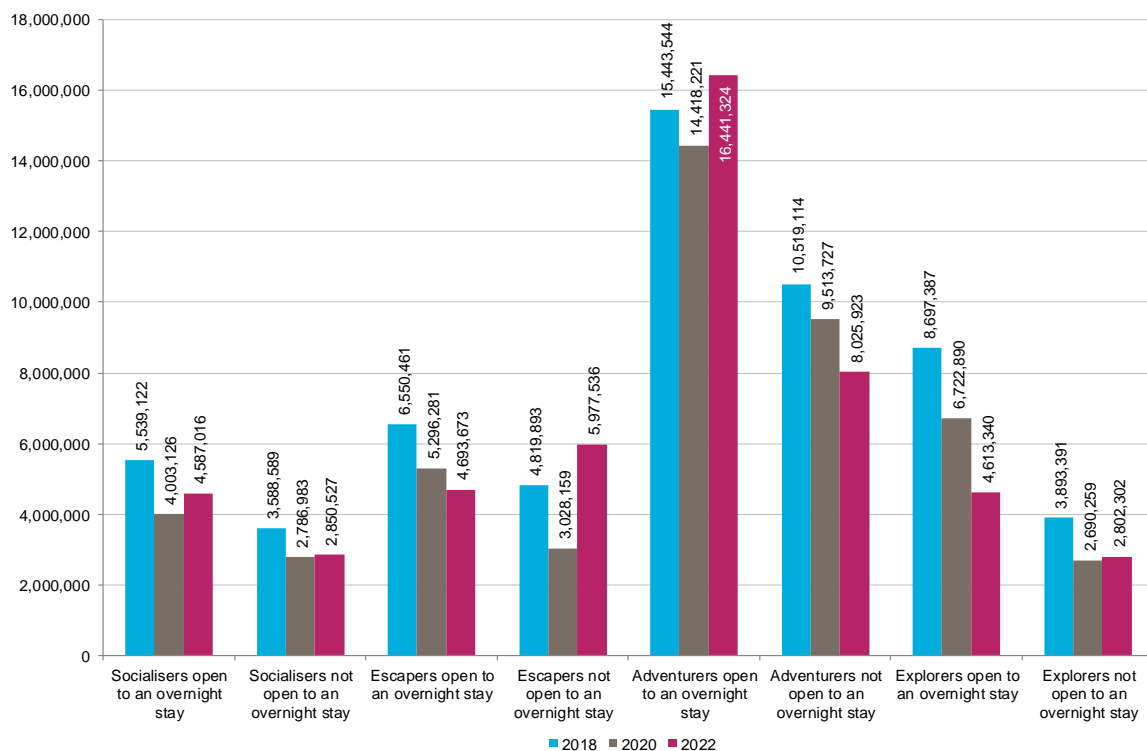
## 9.2 NPWS Park Visits by Segment

As might be expected, given the decline in NPWS visits from 2018 to 2020, the number of visits in each segment declined. However, not all segments rebounded in 2022 even though overall visitation increased from 2020 to 2022. *Adventurers open to an overnight stay* contributed the most visits in 2022 (16.4m), the highest recorded to this point (see Chart 122). The only other segment to peak in visits in 2022 were *Escapers not open to an overnight stay* (6.0m). Declines in visits from 2018 to 2022 were observed for *Escapers open to an overnight stay* (6.5m 0 2018; 4.7m – 2022), *Adventurers not open to an overnight stay* (10.5m – 2018; 8.0m – 2022) and *Explorers open to an overnight stay* (8.7m – 2018; 4.6m -2022). All other segments increase visits marginally from 2020 to 2022.

Chart 123 compares the percentage contribution of the eight visitor sub-segments with their contribution to total NPWS park visits. *Adventures open to an overnight stay* contributed one third of all visits in 2022 (33%) up from 26% in 2018 and 30% in 2020. The only other segment to increase their contribution to visits in 2022 was *Escapers not open to an overnight stay* (12%).

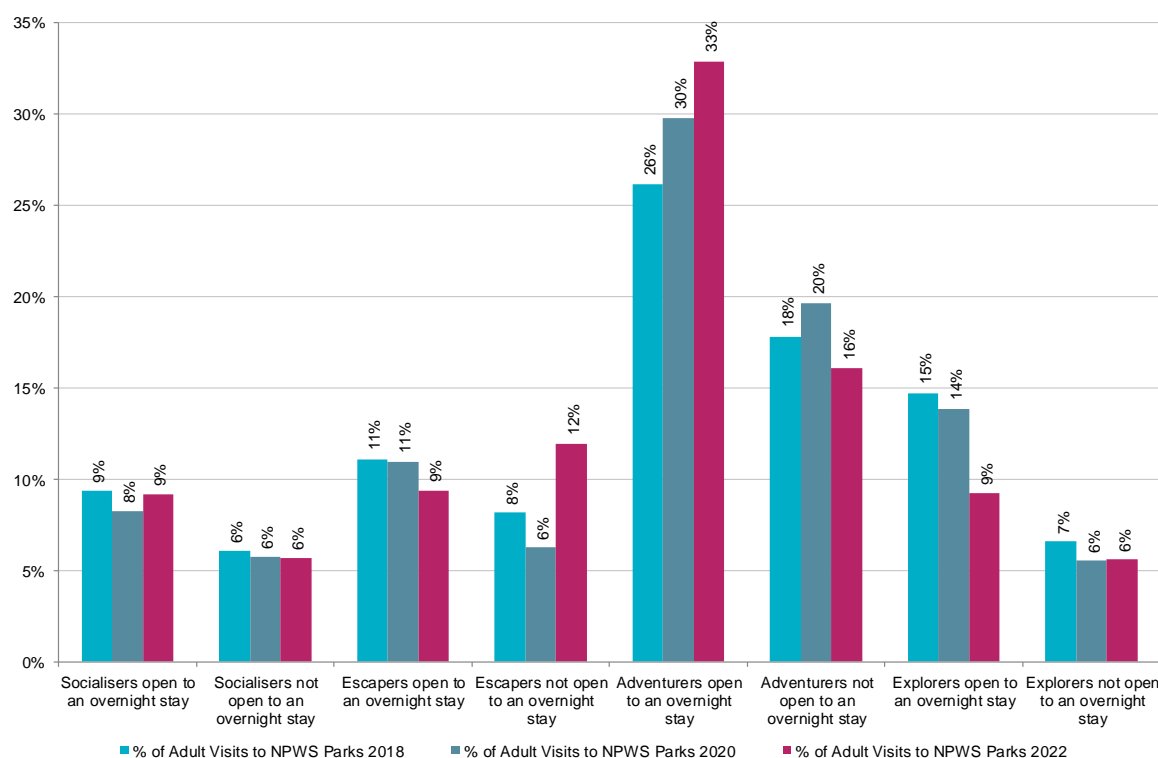
Table 31 shows the average number of visits to NPWS parks by sub-segment. Average number of visits has increased over time for *Socialisers open to an overnight stay* (2.12 – 2018; 2.71 – 2022), *Socialisers not open to an overnight stay* (1.78 – 2018; 2.30 – 2022), *Escapers not open to an overnight stay* (2.15 – 2018; 3.50 – 2022) and *Adventurers open to an overnight stay* (3.24 – 2018; 3.44 – 2022).

Chart 122: NPWS Visits by Sub-Segment



Source: NPWS Parks Visitor Surveys 2018-2022 – Visited a NPWS park in the last 4 weeks  
 Base: 2018 n=1,718; 2020 n=1,178; 2022 n=1,382

Chart 123: NPWS Visit Contribution by Sub-Segment



Source: NPWS Parks Visitor Surveys 2018-2022 – Visited a NPWS park in the last 4 weeks  
 Base: 2018 n=1,687; 2020 n=1,117; 2022 n=1,382

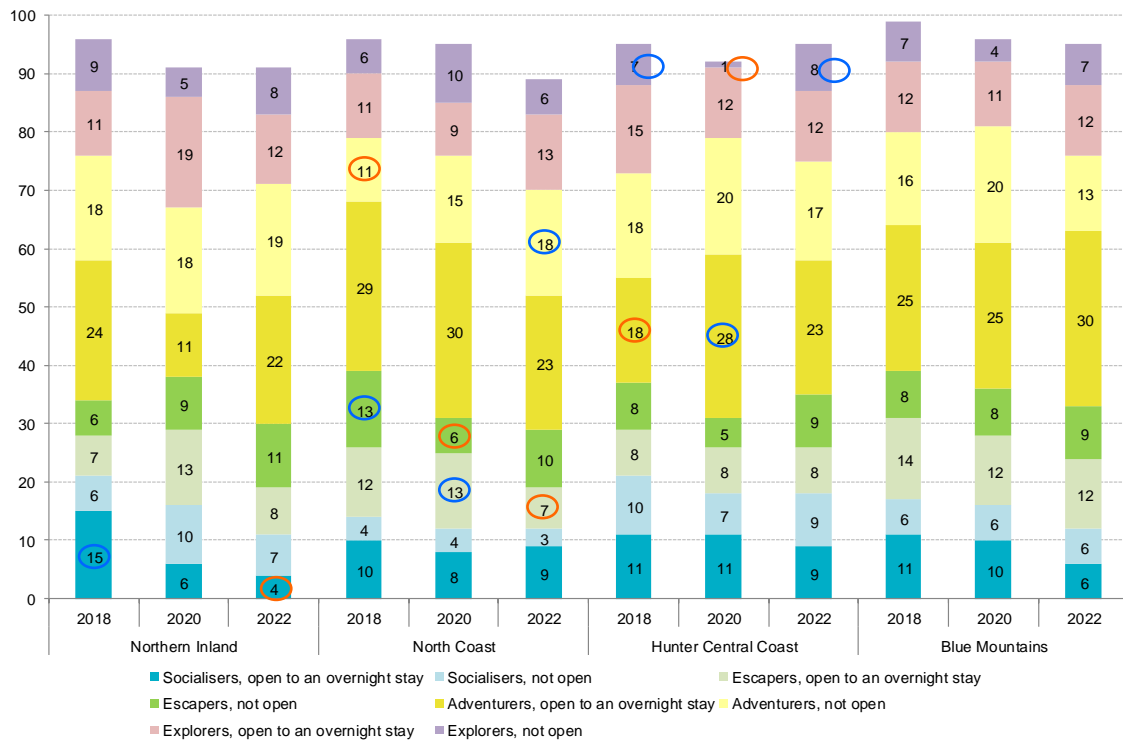
Table 32: Average Visits to NPWS Parks by Sub-segment

Segment	2018	2020	2022
Socialisers open to an overnight stay	2.12	2.65	2.71
Socialisers not open to an overnight stay	1.78	2.22	2.30
Escapers open to an overnight stay	2.54	3.17	2.34
Escapers not open to an overnight stay	2.15	2.30	3.50
Adventurers open to an overnight stay	3.24	3.39	3.44
Adventurers not open to an overnight stay	3.02	3.27	2.30
Explorers open to an overnight stay	3.80	3.64	2.38
Explorers not open to an overnight stay	3.05	2.90	2.51

Source: NPWS Parks Visitor Surveys 2018-2022 – Visited a NPWS park in the last 4 weeks  
 Base: 2018 n=1,687; 2020 n=1,117; 2022 n=1,382

*Adventurers open to an overnight stay* remain the major sub-segment across all Branches in 2022 (Charts 124 and 125), with the exception of Greater Sydney and West Branches where the largest segments are *Adventurers not open to an overnight stay* and *Escapers open to an overnight stay* respectively (*Adventurers open to an overnight stay* rank second for these Branches). The dominant segment for this Branch is now *Explorers open to an overnight stay* (19%). The next most dominant segment is generally *Adventurers not open to an overnight stay*, although for Southern Ranges Branch it is *Explorers open to an overnight stay*.

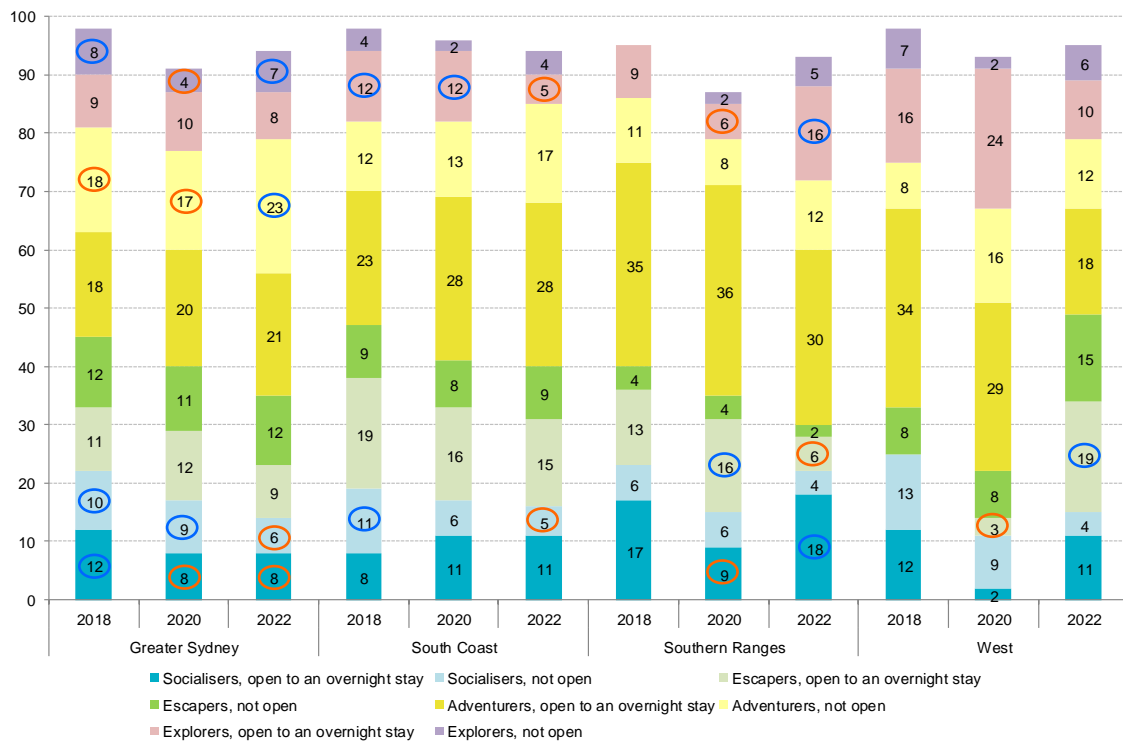
Chart 124: Core Sub-segments by NPWS Branch Part 1



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; 2022 n=1,382

○ Significantly lower than the total  
 ○ Significantly higher than the total

Chart 125: Core Sub-segments by NPWS Branch Part 2



Source: NPWS Parks Visitor Surveys 2018-2022 – Visited a NPWS park in the last 4 weeks  
 Base: 2018 n=1,687; 2020 n=1,178; 2022 n=1,382

○ Significantly lower than the total  
 ○ Significantly higher than the total

## 10. APPENDIX – QUESTIONNAIRE

R10770 NPWS - NATIONAL PARKS VISITOR MONITOR

2022

### **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

## 2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

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](http://www.roymorgan.com)

IF NECESSARY: You can go to the website [www.privacy.gov.au](http://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:**

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

[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

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

- 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*



2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

*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]?

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

- 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**

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

[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        OTHER (SPECIFY)  
          Openend

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

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

9997 Fixed (DO NOT READ) OTHER (SPECIFY)  
Openend  
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



**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

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 VICENTIA, 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]?

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

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**

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

**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

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

[Single]

QVISPART1. Was visiting this park ... ?

READ OUT

- 1 Part of regular daily, weekly or monthly routine
- 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 purpose or intention)
- 3 One of the main reasons for your trip (50% of the trip purpose or intention)
- 4 A minor reason for your trip (25% of the trip purpose or intention)
- 5 Not one of the reasons for your trip (0% of the trip purpose 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**



**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

[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        OTHER (SPECIFY)  
          Openend

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?

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

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
- ↓ ↓

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

489 SAMURI BEACH  
997 Fixed OTHER (SPECIFY)  
Openend  
998 Fixed CAN'T SAY  
Single

*\* 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 routine
- 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 purpose or intention)
- 3 One of the main reasons for your trip (50% of the trip purpose or intention)
- 4 A minor reason for your trip (25% of the trip purpose or intention)
- 5 Not ine of the reasons for your trip (0% of the trip purpose 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 <sup>Fixed</sup>  
      <sub>Openend</sub>        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<br>Openend | OTHER (SPECIFY) |
| 998 | Fixed<br>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<br>Openend | (DO NOT READ) OTHER (SPECIFY) |
| 9998 | Fixed            | (DO NOT READ) CAN'T SAY       |

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

*\* 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<br>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<br>Openend | OTHER (SPECIFY) |
| 998 | Fixed<br>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<br>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 routine
- 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

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

[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 purpose or intention)
- 3 One of the main reasons for your trip (50% of the trip purpose or intention)
- 4 A minor reason for your trip (25% of the trip purpose or intention)
- 5 Not one of the reasons for your trip (0% of the trip purpose 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           |

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

- 9997 Fixed OTHER (SPECIFY)  
Openend
- 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 |
| ↓ | ↓          |

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

489 SAMURI BEACH  
997 Fixed OTHER (SPECIFY)  
Openend  
998 Fixed CAN'T SAY  
Single

*\* 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]

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

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<br>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, Erawal 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?

2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks



- |     |                  |                 |
|-----|------------------|-----------------|
| 1   |                  | ABBOTSBURY      |
|     | ↓                | ↓               |
| 489 |                  | SAMURI BEACH    |
| 997 | Fixed<br>Openend | OTHER (SPECIFY) |
| 998 | Fixed<br>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<br>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

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

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 routine
- 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)

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

- 2 The main reason for your trip (75% of the trip purpose or intention)
- 3 One of the main reasons for your trip (50% of the trip purpose or intention)
- 4 A minor reason for your trip (25% of the trip purpose or intention)
- 5 Not one of the reasons for your trip (0% of the trip purpose 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 <sup>Fixed</sup>  
<sub>Openend</sub> OTHER (SPECIFY)

9998 Fixed CAN'T SAY

9999 Fixed NONE/ NO OTHER PARK

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

*\* 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

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

*\* 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 (DO NOT READ) OTHER (SPECIFY) Openend
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
---	---

2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

- 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)

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

Openend  
998 Fixed CAN'T SAY  
Single

*\* 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<br>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

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

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]

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

QVISPART5. Was visiting this park ... ?

READ OUT

- 1 Part of regular daily, weekly or monthly routine
- 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 purpose or intention)
- 3 One of the main reasons for your trip (50% of the trip purpose or intention)
- 4 A minor reason for your trip (25% of the trip purpose or intention)
- 5 Not one of the reasons for your trip (0% of the trip purpose 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?

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

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

2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks

**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
- 1 HINDI
- 1 TAGALOG (FILIPINO)
- 1 ABORIGINAL/INDIGENOUS LANGUAGE
- 9 Open
- 7 end OTHER (SPECIFY)
- 9 Single
- 8 CAN'T SAY/REFUSED

[Single]

Q18. What is the highest level of education you have reached?



- 1 PRIMARY SCHOOL



**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

- 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

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

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 |

**2022 Telephone Survey to Monitor Visits to NSW NPWS Managed Parks**

- 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**

[Return To Top](#)<sup>4</sup>

Prepared by:  
David Erickson & Radhika Mani

For Further information contact:

Roy Morgan  
Tonic House  
386 Flinders Lane, Melbourne  
Ph: +61 (3) 9629 6888  
E: [askroymorgan@roymorgan.com](mailto:askroymorgan@roymorgan.com)

File Reference:

