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1. EXECUTIVE SUMMARY

1.1 Background

In January 2008, the then NSW Department of Environment and Climate Change (DECC), commissioned Roy Morgan Research to conduct a thirteen-wave telephone survey to estimate annual visits to NSW NPWS managed Parks for the 2008 year. In order to determine the best approach to provide a reliable estimate of the number of park visits, Roy Morgan Research undertook a pilot survey in September-October 2007. The approach recommended through the pilot was confirmed and approved by DECC. Roy Morgan Research was recommissioned to repeat the study in 2010 and has since been commissioned to conduct the study in 2012, 2014 and 2016 by the Office of Environment & Heritage (OEH) which continues the project from DECC. This report provides a summary of results from the 2016 survey.

Interviewing was conducted by Computer Assisted Telephone Interviewing (CATI) and eligible respondents to the survey had to be aged 18+ years living in Sydney, Remainder NSW, ACT, Melbourne, Remainder VIC, Brisbane, and Remainder Southern QLD. The sampling frame was modified for the 2012, 2014 and 2016 surveys, using Random Digit Dialling (RDD) for both landline and mobile phone numbers, as opposed to the Electronic White Pages (EWP) which was used for the 2008 and 2010 surveys. Quotas were set for age by sex by region to ensure representativeness across those areas. An approximate total of 1,200 interviews were conducted in each wave, with the overall sample size after wave thirteen in 2016 being 15,683 people.

The term visitation (visits) is used throughout this report not the number of visitors to these parks as a visitor can make more than one visit to a park in any given 4-week period or wave.

1.2 Approach to Calculating and Improving the Park Visitation Estimate

As part of the initial specifications it was agreed that it was better to produce a visitation estimate that errs on the side of caution rather than derive an estimate that could be unduly inflated. The main methods used to ensure this type of estimate was generated included:

---

1 2008 and 2010 survey estimates have now been adjusted to account for the change in the sampling frame.
2 Visitation calculation = \left( \sum \text{number of adult visits to a NSW NPWS park obtained for each respondent multiplied by their individual population survey weight for all 13 survey waves} \right) + \sum \text{number of child visits to a NSW NPWS park for each household multiplied by their household survey weight for all thirteen survey waves} \times \text{non-response error adjustment.}
• Limiting survey scope to regions wherein visitation to NSW by the resident population was likely and significantly large, in order to strengthen the confidence limit of the estimate;

• Conducting the survey as a ‘stand-alone’ survey rather than ‘piggy-backing’ questions on an Omnibus style survey to improve response rates and reduce non-response bias.

• Expanding the scope of the survey using a RDD sampling approach to include responses from new numbers, silent numbers and households that only have mobile phones in order to ensure that the entire population has an opportunity to complete the survey;

• Limiting recall of visitation to ‘within the last 4 weeks’.

• Asking respondents to name the park they visited, ensuring that the park visited could be categorised as being either NSW NPWS or non-NSW 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-scopes;

• 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-counting child visits.

Furthermore, in order to ensure that the final NSW NPWS park annual visitation estimate obtained was accurate, and that survey estimates were comparable over time, procedures were put in place to ensure that the quality of survey data improved as the survey progressed throughout the year. Such quality improvement practices included:

1. Updating lists of NSW NPWS park names and their aliases at the end of each wave as necessary to improve park categorisation;

2. Adding names of non-NSW NPWS parks regularly visited to assist in excluding parks not in-scope for the survey;

3. Citing the actual date four weeks prior to the date of interview in the questionnaire to minimise the effects of telescoping – the tendency for respondents to over-estimate the time period when they last visited a park (e.g. respondents will name a park they visited 5 weeks ago when they were asked to name a park they visited in the last 4 weeks);

4. A rigorous post-field ‘cleaning’ phase of any responses where a park ‘type’ could not be assigned at the time of interview;

5. Referring parks that could not be classified to OEH for a final decision on categorisation;
6. 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 estimate reflects actual ‘real world’ visits; and
7. Re-calculation of the 2008 and 2010 visitation estimates to account for the sampling frame change from EWP to RDD.

After thirteen waves of the 2016 survey, the following interviewing results maximise confidence in the visitation estimate obtained:

- Over nine in ten respondents (98%) could spontaneously name the park they visited or recalled the park name once prompted from a list of associated towns within close proximity to each park— a result higher than in previous years (around 90% for all other years) (Figure. A). Provision of park name enabled accurate categorisation of the park to the NSW NPWS or non-NSW NPWS categories. Most other visitation surveys only ask respondents to name the type of park visited without verification. Pilot survey results in 2007 showed that a significant 50% of respondents categorised the NSW park type incorrectly, so minimising the amount of self-categorisation has greatly strengthened the accuracy of the visitation estimate. For the 2016 survey, only 2% of responses were categorised as a NSW NPWS or non-NSW NPWS by park type (1% allocated by park type; 1% imputed, as the respondent was uncertain of park type).

![Figure A: Allocation of Park Type by Method](image-url)

1. 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 park of visited could not be ascertained from a respondent’s survey responses, park type was imputed based on the overall ratio of NSW NPWS parks named to Non-NSW NPWS parks named for all survey respondents visiting a park in the last 4 weeks (the ratio used was 3:1 NSW NPWS to non-NSW NPWS).
• Response rates for the 2016 survey were also over 66% higher than that of a comparable omnibus style survey conducted at the same time as each wave (18.1% c.f. 10.9%). Similar response rate differences were found for the 2008, 2010, 2012 and 2014 surveys. Conducting the survey via a stand-alone survey methodology clearly generates higher response rates than a shared-cost methodology.

1.3 NSW NPWS Park Visitation

Annual NSW NPWS Park Visitation

Survey results from waves 1-13, along with estimation of visitation from non-surveyed regions provides the following annual NSW NPWS Park domestic visitation estimates for 2008 to 2016 (Figure B). The 2016 NSW NPWS park visit estimate is the highest so far recorded (51.77m visits). Adult visits comprise 82.1% of all visits in 2016 (80.3% – 2014; 81.0% - 2012; 80.6% - 2010; 82.1% - 2008).

Figure B: Final Annual NSW NPWS Park Visitation Estimate - by Year

The confidence interval for the survey estimates in 2016 is +/-3.49% of the total estimate (+/-2.72% for adults; +/-7.04% 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 2016 varies from 49,892,147 to 53,661,499. This overall margin of error (+/-3.64) is well within the parameters required by OEH (+/-8% at the 95% confidence level). It also means that, when taking into account the margin of error for previous surveys,
the 2016 annual visitation estimate is significantly higher than the visitation estimates for all previous years.

The Impact of Non-response Adjustment on the NSW NPWS Park Visitation Estimate

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

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:

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 NSW 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 – 0.7902

As can be seen the 2014 non-response adjustment ratio was the lowest, while the 2016 was the highest. This means that the initial 2014 visitation calculation from survey responses was down-weighted the most and the initial 2016 calculation was down-weighted the least to account for non-response.

The reason for this is that, as part of the process to improve the accuracy of the visitation estimate, greater proportions of mobile phone numbers were contacted for interview in 2016 (53%) than in 2014 (23%) to more accurately reflect the Australian population based on their 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 22% of mobile only households being surveyed in 2016 compared with only 9% in 2014 when the actual incidence rate in the survey population was 26% and 24% respectively.

The non-response adjustment ratio for mobile numbers in 2016 was 0.9106 and the ratio for landline numbers was 0.7406, while the results in 2014 were 0.7392 and 0.5602 respectively. This shows that calls to mobile numbers provide a visitation estimate that is closer to reality than do calls to landline numbers. It also means that since the proportion
of mobile calls from 2008 to 2014 was low, the non-response adjustment estimate is likely to be low as well. Therefore, the final visitation estimates calculated from 2008 to 2014 and reported herein are likely to be slightly lower than they were in reality.

**Potential Tourism, Economic and Climatological Factors influencing NSW NPWS Park Visits**

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

1. Visitation to NSW:
   - Tourism Research Australia\(^1\) estimates of both domestic overnight visitors and visitor nights in NSW fell from 2008 to 2010, then re-bounded in 2012 and have continued to increase in both 2014 and 2016. This trend was evident for both intrastate overnight visits within NSW and interstate overnight visits to NSW. These movements closely match the NSW NPWS park visitation pattern.
   - Domestic Day trip visitors in NSW increased steadily from 2008 to 2012 declined in 2014 and rebounded in 2016\(^2\). With the majority of trips to NSW NPWS parks being day trips, the visitation pattern for single adult trips to parks should closely match day trip visitors to NSW. This is in fact the case (see Figure C);

**Figure C: Single Visits\(^3\) to NSW NPWS Parks versus Day Visitors in NSW**

![Graph showing visitation trends](image)

3. Estimated number of single adult visits from survey estimates is as follows: 16,267,105 - 2008; 15,461,502 - 2010; 16,360,105 – 2012; 17,549,950 – 2014; 24,092,830 - 2016. Day Visitor Source: National Visitor Survey – Tourism Research Australia (N.B. Number of day visits is not provided by TRA, only number of day visitors).

\(^{1,2}\) Tourism Research Australia – National Visitor Survey.
The number of visitors to NSW NPWS parks may also be influenced by domestic overnight visitation. The TRA estimate for overnight visitors to NSW shows that the number of overnight visitors in 2012 exceeded the number of overnight visitors in 2008 (after declining in 2010), with 2014 and 2016 overnight visitors respectively being the highest levels recorded. However, in terms of NSW NPWS park visits, whilst the 2012 estimate increased from the 2010 low, it did not exceed the 2008 estimate. Movements in the 2014 and 2016 visitation estimates did however, mirror those of overnight visits. Therefore, while the pattern of overnight visits to NSW NPWS visits is similar, it does not always match those for park visits.

Whilst this survey was not designed to calculate the number of annual visitors to NSW NPWS parks, using the average number of visits per adult to NSW NPWS parks, a proxy for the number of adult visitors can be calculated. In 2008 the proxy number of adult visits to NSW NPWS parks was 10.4m; in 2010 it was 9.5m; in 2012 it was 10.5m (higher than 2008 levels), in 2014 it was 10.8m and in 2016 it was 16.0m. This pattern does precisely match the overnight visitation pattern sourced from TRA. It can therefore, be inferred that the number of visitors to NSW NPWS parks does in fact, mirror overnight visitation movements in NSW.

From the results provided above, it does appear on some measures that visitation to NSW NPWS parks does correlate with domestic tourism related visitation to and within NSW.

2. Visitation to Overseas Destinations:

Tourism Research Australia\(^1\) data shows that numbers of Australians visiting overseas has steadily increased from 5.3m visitors in 2008 to 8.8m in 2016, constituting 69% growth in eight years. A competitive Australian dollar can make overseas travel more cost competitive and therefore attractive. As a result Australians may either trade-off domestic travel for overseas travel or shorten their domestic trips.

More in-depth analysis shows that NSW 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 from a weather perspective is more enticing (i.e. for summer in the northern hemisphere).

3. Economic Impacts:

Lower interest rates are likely to provide more disposable income for travel and a more positive disposition as less money needs to be spent on mortgages and

\(^1\) Tourism Research Australia – National Visitor Survey.
• Loan repayments. Mapping NSW NPWS park visitation against interest rates (i.e. cash rate) shows that in 2010 rises in interest rates coincided with lower NSW NPWS park visitation, while falls in interest rates in 2012 to 2016 tended to coincide with higher levels of park visitation. However, interest rates were high in 2008 when park visitation was also high, so it would appear that the linkage between interest rates and visitation may not be as strong as expected.

4. Weather Effects:
• Mapping NSW NPWS park visitation against temperature divergence from the average shows a direct correlation between visitation and temperature from 2008 to 2012. When temperatures are above the average visitation increases and when temperatures are below the average visitation decreases. However, the 2014 visitation estimate by month differs slightly from previous years, as from March to June visitation tended to increase when temperature was decreasing. Nevertheless, the 2008 to 2012 correlation was observed again in 2016, so it would appear that this temperature-visitation correlation is real. It will however, be subject to variation at the regional level;
• When rainfall divergence from the average is mapped against NSW NPWS park visitation, another correlation emerges – visitation increases when rainfall falls below the average and vice versa. However, this rainfall-visitation relationship does not appear to be as strong in 2012 and 2014 compared to other years and in 2016 a weak, but opposing trend emerges. Rainfall is more likely to impact on visitation if it is raining at both the visitor’s origin and intended destination and is therefore, more likely to correlate with visitation at the regional level.

Significant and sustained weather events are also likely to impact 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, NSW NPWS park visitation was lower than earlier years in 2012 and higher toward the end. 2014 was 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 (apart from some major rain in June and September), with park visitation being the highest recorded. Of course local weather events will impact on local visitation. For example, floods and rains as a result of cyclones impacted on communities in 2010 in the north of the state and in 2016 in metropolitan Sydney. It is therefore, apparent that travel trends, economic cycles and weather conditions can variously effect NSW NPWS park visitation rates.

1 Bureau of Meteorology – Climate Data Online.
Annual Visitation by Region of Origin

Intrastate visitation comprised 87.4% of all visits in 2016 (90.5% - 2014; 88.6% - 2012; 88.3% - 2010; 90.8% - 2008), while interstate visitation comprised 12.6% of visits. (9.5% - 2014; 11.4% - 2012; 11.7% - 2010; 9.2% - 2008) (Table A).

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

<table>
<thead>
<tr>
<th>Final Adjusted Annual PWG Park Visitation Estimate 2014¹</th>
<th>Adult Visits</th>
<th>Child Visits</th>
<th>Total Visits</th>
</tr>
</thead>
<tbody>
<tr>
<td>No.</td>
<td>%</td>
<td>No.</td>
<td>%</td>
</tr>
<tr>
<td>Sydney</td>
<td>22,840,314</td>
<td>53.75%</td>
<td>4,576,398</td>
</tr>
<tr>
<td>Remainder NSW</td>
<td>14,693,397</td>
<td>34.58%</td>
<td>3,143,783</td>
</tr>
<tr>
<td>ACT</td>
<td>543,153</td>
<td>1.28%</td>
<td>136,909</td>
</tr>
<tr>
<td>Melbourne</td>
<td>1,596,393</td>
<td>3.76%</td>
<td>512,468</td>
</tr>
<tr>
<td>Remainder VIC</td>
<td>545,108</td>
<td>1.28%</td>
<td>128,763</td>
</tr>
<tr>
<td>Brisbane</td>
<td>977,254</td>
<td>2.30%</td>
<td>147,215</td>
</tr>
<tr>
<td>Remainder SE QLD</td>
<td>632,210</td>
<td>1.49%</td>
<td>474,649</td>
</tr>
<tr>
<td>Remainder QLD</td>
<td>161,790</td>
<td>0.38%</td>
<td>38,995</td>
</tr>
<tr>
<td>SA</td>
<td>228,175</td>
<td>0.54%</td>
<td>54,995</td>
</tr>
<tr>
<td>WA</td>
<td>180,941</td>
<td>0.43%</td>
<td>43,611</td>
</tr>
<tr>
<td>TAS</td>
<td>58,261</td>
<td>0.14%</td>
<td>14,042</td>
</tr>
<tr>
<td>NT</td>
<td>38,516</td>
<td>0.09%</td>
<td>9,283</td>
</tr>
<tr>
<td>Total Australia 2016</td>
<td>42,495,513</td>
<td>100.00%</td>
<td>9,281,310</td>
</tr>
</tbody>
</table>

Margin of Error ² ±2.83% n/a ±7.34% n/a ±3.64% n/a

Total Australia 2014 | 31,674,661 | 100.00% | 7,761,387 | 100.00% | 39,436,048 | 100.00% |
Margin of Error ² ±2.84% n/a ±7.99% n/a ±3.85% n/a

Total Australia 2012 | 28,745,337 | 100.00% | 6,750,287 | 100.00% | 35,495,625 | 100.00% |
Margin of Error ² ±2.90% n/a ±8.02% n/a ±3.87% n/a

Total Australia 2010 | 27,262,279 | 100.00% | 6,581,347 | 100.00% | 33,843,626 | 100.00% |
Margin of Error ² ±3.18% n/a ±4.40% n/a ±3.54% n/a

Total Australia 2008 | 31,128,875 | 100.00% | 6,798,741 | 100.00% | 37,927,616 | 100.00% |
Margin of Error ² ±3.34% n/a ±4.40% n/a ±3.54% n/a

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

NSW NPWS Park Visitation by Survey Wave

Figure D shows the seasonality of visitation by survey 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.

Please note that wave data has been aligned to follow a calendar year, as some of the annual surveys commenced at different times of the year. For example, wave 1 in 2010, wave 12 in 2008-09, wave 11 in 2012-13, wave 1 in 2013-14 and wave 1 in 2015-16 all correspond to the visitation period 6 December-6 January.

Overall visitation to NSW NPWS parks in 2010 was higher than in 2008 during the winter months (waves 6-9), as well as in January (wave 2). However, 2010 visitation was markedly lower than in 2008 in late summer-early autumn (waves 3-5) and in early summer (waves 12-13).

NSW NPWS park visitation in 2012 was significantly higher than in other years in December-January and significantly lower in February-April and June-July. In fact, the high level of
visitation in December-January 2012-13 was a primary factor in the annual 2012 estimate being higher than the 2010 estimate.

In 2014 NSW NPWS park visitation was significantly higher than in all other years in May (wave 6). Visitation in 2014 was significantly higher than 2008 in December and January (waves 1 and 2) but significantly lower than in 2008 for August-September (wave 10). 2014 visitation was significantly higher than 2010 levels in December (wave 1) and October-November (waves 12 and 13). 2014 visitation was significantly higher than 2012 levels in March (wave 4) and October (wave 12), but was significantly lower in July-August (wave 9).

In 2016 NSW NPWS park visitation was significantly higher than in all other years in January (wave 2), from mid-July to mid-August (waves 8 and 9) and from early October to early December (waves 12 and 13). In fact, the highest number of visits was recorded in 2016 for ten of the 13 waves. Visitation in 2016 was similar to previous years from the beginning of February to the end of April (waves 3 to 5) and from late May to late June (wave 7).

As was the case in previous years annual and wave by wave NSW NPWS park visitation patterns are mainly determined by adult visitation patterns. Whilst the overall annual child visitation estimate is the highest on record in 2016 at 9.1m visits, child visits only represented 17.9% of all NSW NPWS park visits, the lowest percentage recorded (18.0% - 2008; 19.4% - 2010; 19.0% - 2012; and 19.7% - 2014).
Figure D: Adjusted Annual Visitation Survey Estimate by Wave\(^1\)

Results provided in the graph only include visitation for regions surveyed, so the overall visitation estimate shown above is 38,607,440 for 2014; 34,780,462 for 2012; 33,378,662 for 2010; and 37,238,965 for 2008 (i.e. the additional 559,930 visits in 2014; 715,163 visits in 2012; 464,964 visits in 2010; and 688,651 visits in 2008 are estimated for regions of Australia not included in the survey).

1. Results provided in the graph only include visitation for regions surveyed, so the overall visitation estimate shown above is 38,607,440 for 2014; 34,780,462 for 2012; 33,378,662 for 2010; and 37,238,965 for 2008 (i.e. the additional 559,930 visits in 2014; 715,163 visits in 2012; 464,964 visits in 2010; and 688,651 visits in 2008 are estimated for regions of Australia not included in the survey).

- **W1** - School holidays; Christmas; New Year
- **W2** - School holidays Australia Day
- **W3** - School holidays Anzac Day
- **W7** - School holidays VIC & QLD 2008 & 2010 & (QLD 2016)
- **W8** - School holidays ACT
- **W9** - QLD – Labour Day Show Day
- **W10** - School holidays QLD 2016
- **W11** - School holidays; NSW & ACT – Labour Day; ACT - Family & Community Day 2012
- **W13** - School holidays QLD 2016

![Graph showing adjusted annual visitation survey estimate by wave](image-url)
1.4 Activities Undertaken on Most Recent Park Visit

Respondents who had visited a NSW NPWS park were asked what activities they undertook on their most recent visit. In 2016, the top four activities undertaken remained unchanged. The incidence of undertaking walking activities increased significantly over all previous years in 2016 while incidence of undertaking picnicking and dining activities returned to 2008 levels from the low of 11% in 2014. The incidence of undertaking water-based activities had been slowly (but not significantly) increasing over time, but in 2016 it declined again to 2008 levels (17%). The proportion touring and sightseeing was at its highest level recorded in 2016 (significantly higher than 2010 and 2012 results):

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Walking</td>
<td>54%</td>
<td>50%</td>
<td>56%</td>
<td>49%</td>
<td>63%</td>
</tr>
<tr>
<td>Water-based Activities</td>
<td>17%</td>
<td>18%</td>
<td>19%</td>
<td>20%</td>
<td>17%</td>
</tr>
<tr>
<td>Picnicking and Dining</td>
<td>14%</td>
<td>16%</td>
<td>16%</td>
<td>11%</td>
<td>14%</td>
</tr>
<tr>
<td>Touring and Sightseeing</td>
<td>12%</td>
<td>10%</td>
<td>9%</td>
<td>13%</td>
<td>13%</td>
</tr>
</tbody>
</table>

1.5 Satisfaction with Most Recent Park Visit

Respondents who had visited a NSW NPWS park were asked to give an overall satisfaction rating based on their most recent visit. Figure F 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 the proportion who were very satisfied increased to 60%, with a slight decline to 59% occurring in 2014.

In 2008 the level of those “satisfied” with their park visit (i.e. sum of those satisfied or very satisfied) was 90%. This figure increased to 93% in both 2010 and 2012 and increased again to 94% in 2014 and 2016. The 2008 figure is significantly lower than that attained in all succeeding years.

A mean satisfaction score has been calculated for satisfaction with visit to a NSW NPWS park (see Section 8.5 for calculation of the mean). This should be interpreted as 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 scores rose slightly to 1.50. In 2016, the satisfaction score rose again to 1.52 – so satisfaction with recent park visit experience is very high and is increasing slowly over time. In fact, the 2016 mean satisfaction score is significantly higher than the 2008 and 2010 means.
1.6 Role of Park Visit in Overall Trip Motivation in 2016

From 23 May to 12 December 2016 (survey wave 7 - 13) adult NSW NPWS park visitors were asked two new questions for each different NSW NPWS park they visited. The two questions asked were:

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?

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)?
Figure H shows that more than half responded that the purpose of their NSW NPWS park visit was part of a day trip (54.2%), while one in five stated that their visit was part of an overnight visit or multi-day trip (20.3%). Almost three in ten (29.2%) indicated that their visit was part of a regular routine. This may have been for a regular activity but it is unknown whether these visits were day trips or overnight trips or what these “routines” were.

Overall, one third of NSW NPWS park visitors stated that visiting the park was the only reason for their trip (34.0%), while three in ten indicated that it was the main reason for their trip (31.5%). Around one in six visitors responded that their visit was one of the main reasons for their trip (16.5%), or a minor reason for their trip (15.6%). Less than one in ten responded that their NSW NPWS park visit was not one of the reasons for their trip (8.8%). These responses resulted in a mean score of 66.5% indicating that, in general, a visit to a NSW NPWS park is one of the main reasons for undertaking their trip.

Demographic segments with a high incidence of day trip behaviour include large families, 18-24 year olds, non-English speakers and Sydneysiders, along with those where the main reason for the trip was to visit the NSW NPWS Park. Those with a higher incidence of visiting as part of an overnight trip include interstate visitors and those whose visit to a NSW NPWS park was no reason or only a minor reason for their visit. Those with a high
incidence of visiting the park as *part of a regular routine* included those aged over 35 years and those living in the Remainder of NSW. Proportions are provided in Table D following.

### Table D: Those with a Higher Incidence of having a Specific Response to Purpose of Visit

<table>
<thead>
<tr>
<th>Part of Day Trip</th>
<th>Part of an overnight visit or multi-day trip</th>
</tr>
</thead>
<tbody>
<tr>
<td>4+ children in the household</td>
<td>87.3%</td>
</tr>
<tr>
<td>18-24 year olds</td>
<td>76.8%</td>
</tr>
<tr>
<td>The main reason for your trip (75% of the trip intention)</td>
<td>63.0%</td>
</tr>
<tr>
<td>Non-English speakers</td>
<td>60.8%</td>
</tr>
<tr>
<td>Sydney</td>
<td>58.1%</td>
</tr>
<tr>
<td>Part of a regular, daily, weekly or monthly routine</td>
<td>54.2%</td>
</tr>
<tr>
<td>35-49 year olds</td>
<td>34.3%</td>
</tr>
<tr>
<td>50+ year olds</td>
<td>33.1%</td>
</tr>
<tr>
<td>Remainder NSW</td>
<td>33.3%</td>
</tr>
</tbody>
</table>
2. INTRODUCTION

2.1 Background

The Office of Environment and Heritage (OEH), commissioned Roy Morgan Research to repeat a thirteen wave telephone survey (previously conducted in 2008, 2010, 2012 and 2014) to monitor and estimate the annual number of visits to NSW parks in 2016.

The New South Wales National Parks and Wildlife Service (NSW NPWS) within the Office of Environment and Heritage is responsible for ensuring the conservation of protected native flora and fauna within the parks and reserve system, promoting community use, awareness, understanding and appreciation of natural and cultural heritage.

At present there are 872 parks and reserves in New South Wales for which NSW NPWS has responsibility, including wilderness areas, national parks, nature reserves, state conservation areas, and regional parks.

Encouraging people to engage with national parks through promoting sustainable tourism and visitation is a key means of promoting community use, awareness, understanding and appreciation of natural and cultural heritage of the natural estate under its care.

The important role NSW national parks play in stimulating substantial levels of visitation is detailed in this report. They are therefore, an integral contributor to state, regional and local tourism economies. In this respect they have an important role to play in the realisation of the NSW Government’s Visitor Economy Industry Action Plan.

The NSW Government announced its intention to develop industry action plans for key sectors of the economy in September 2011 with the release of NSW 2021: a Plan to Make NSW Number One. NSW 2021 is a 10-year plan to rebuild the economy and identifies the visitor economy as a critical sector to contribute to the growth of the overall NSW economy. The Visitor Economy Industry Action Plan is one of six Industry Action Plans under NSW 2021. Other Industry Action Plans focus on the digital economy, manufacturing, professional services, international education and research, and creative industries. Goal 1 in NSW 2021 ‘to improve the performance of the NSW economy’ sets an ambitious target to double overnight visitor expenditure to NSW by 2020. Achieving the visitor economy target in timeframe to 2020 requires an increase in visitor expenditure from $18.3 billion per annum to $36.6 billion per annum in 2020.

NSW NPWS is responsible for collecting data on park visits to track park visitation over time. Such an exercise requires an appropriately rigorous and reliable approach to the collection of data on visits. Until 2008 however, estimates of the number of visits to parks and
reserves managed by NSW NPWS had been developed in an ad hoc manner through a mixture of visitor use data provided by individual park managers, based on 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 Research to test an approach to more precisely measuring NSW NPWS park visitation. In 2008, a slightly modified approach from that used in the pilot was used to estimate annual visitation for 2008 and later 2010. In 2012 the methodology was again modified slightly to more accurately estimate NSW NPWS park visitation for succeeding years and to identify any trends in visitation since 2008.

2.2 Objectives

The main objective of this study is to provide a reliable estimate of annual NSW NPWS park visitation (i.e. the total number of annual visits) for 2016, to allow comparison with results attained in 2008, 2010, 2012 and 2014. More specifically, the objectives of this study are to:

1. Use the sampling frame and data collection methodology applied in 2012 (i.e. CATI – slightly modified from the 2008 and 2010 approach) to obtain estimates and confidence limits of total visits to NSW NPWS managed parks in 2016 with level of accuracy similar to that obtained in previous years (i.e. ±4% of the true number);
2. Estimate the proportion of visitors participating in different activities when visiting NSW NPWS parks and compare visits to NSW NPWS managed parks and activities undertaken by different demographic groups;
3. Obtain a measure of overall satisfaction with the NSW NPWS park visit experience;
5. Identify any potential causes or ‘triggers’ that influence park visitation.

The three major research tasks required for the 2016 study were as follows:

1. Conduct a Computer Assisted Telephone Interviewing (CATI) survey amongst residents aged 18 years and over living in NSW, ACT, Victoria and southern and southeast QLD using the methodology and questionnaire employed in 2012 (and similar to that used in 2008 and 2010 - see section 3.1.1. for changes), to ensure that survey results will be comparable and whatever changes (i.e. minor modifications to the questionnaire, sampling fame etc.) can be tracked over time;
2. Estimate the number of visits to NSW 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 NSW NPWS managed parks (i.e. total visits, adult visits, child visits, visits by survey wave and region of origin, visits to each NSW NPWS Park Operations Branch, the average number of visits per visitor) and confidence limits for the overall estimate;
• Compare the incidence of visits and visitors by different demographic groups with their proportions in the general population;
• Estimate the proportion of visitors participating in different activities at the park (for their most recent visit);
• Compare participation rates in activities by different demographic groups;
• Estimate the level of satisfaction with most recent park visit;
• Identify statistically significant differences in number of visits, profile of demographic groups, participation rates in activities and satisfaction between 2008 and 2016; and
• Investigate any potential influences on park visitation.

3. METHODOLOGY

This study was conducted using Roy Morgan Research’s in-house Computer Assisted Telephone Interviewing (CATI) system over thirteen waves, spaced 4-weeks apart over a 12-month period. The first wave commenced on 4 January 2016, with the thirteenth wave concluded on 12 December 2016.

To enable to comparison of 2016 data with 2008, 2010, 2012 and 2014 results on a wave by wave basis, survey waves for 2016 were scheduled to commence as close as possible to the same week in which waves were conducted in 2008, 2010, 2012 and 2014.

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 because their overall share of visits to and within NSW was the highest of all regions, as determined from Roy Morgan Research Holiday Tracking Survey (HTS) data. Other regions of Australia which are not surveyed have
had NSW 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 and 2014 surveys, 2016 quotas (Table 3.1) were set in each survey wave for age by sex by region to be representative of each region’s population (based on ABS population estimates for that year). A target of 1,200 interviews was set for each wave.

Table 3.1: Quotas Set per Wave

<table>
<thead>
<tr>
<th>Age by Sex Quotas 2016</th>
<th>Sydney</th>
<th>Rem NSW</th>
<th>ACT</th>
<th>Melbourne</th>
<th>Rem VIC</th>
<th>Brisbane</th>
<th>Rem SE QLD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male 18-24 yrs</td>
<td>17</td>
<td>11</td>
<td>7</td>
<td>13</td>
<td>5</td>
<td>11</td>
<td>10</td>
</tr>
<tr>
<td>Male 25-34 yrs</td>
<td>26</td>
<td>13</td>
<td>17</td>
<td>22</td>
<td>7</td>
<td>15</td>
<td>14</td>
</tr>
<tr>
<td>Male 35-49 yrs</td>
<td>33</td>
<td>23</td>
<td>21</td>
<td>27</td>
<td>12</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>Male 50+ yrs</td>
<td>47</td>
<td>50</td>
<td>28</td>
<td>37</td>
<td>25</td>
<td>28</td>
<td>30</td>
</tr>
<tr>
<td>Female 18-24 yrs</td>
<td>16</td>
<td>10</td>
<td>12</td>
<td>12</td>
<td>6</td>
<td>11</td>
<td>10</td>
</tr>
<tr>
<td>Female 25-34 yrs</td>
<td>26</td>
<td>15</td>
<td>14</td>
<td>21</td>
<td>7</td>
<td>15</td>
<td>14</td>
</tr>
<tr>
<td>Female 35-49 yrs</td>
<td>34</td>
<td>24</td>
<td>22</td>
<td>27</td>
<td>12</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>Female 50+ yrs</td>
<td>51</td>
<td>54</td>
<td>29</td>
<td>41</td>
<td>26</td>
<td>30</td>
<td>32</td>
</tr>
<tr>
<td>TOTAL</td>
<td>250</td>
<td>200</td>
<td>150</td>
<td>200</td>
<td>100</td>
<td>150</td>
<td>150</td>
</tr>
</tbody>
</table>

3.1.1 New Sampling Frame Used in 2012, 2014 and 2016

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 Pages1 (EWP). In addition, non-business mobile phone sample was also drawn from the EWP in order to include households which may have no landlines.

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

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1 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).
In addition, types of “telephone” communication across the world have changed rapidly. Households and individuals now have the choice of fixed landlines, mobile phones and broadband internet-based telecommunication services such as Skype, VoIP, and Google Voice etc. Figure 3.1.1 shows that almost 22% of the Australian population reside in mobile only households (i.e. have no fixed landlines). Only a small proportion of these numbers are listed in the White Pages.

**Figure 3.1.1: Phone Status by Year**

Source: Roy Morgan Single Source – 14 years+ population

In addition, approximately 20% of households move location every year, with 10%-15% of these not yet being recorded on current phone listings. A further 10% of households have silent numbers. Overall it is clear that the use of commercial phone listings for sampling purposes is becoming increasingly inefficient as it excludes a significant proportion of households not listed.

To address this issue for the 2012, 2014 and 2016 surveys the sampling frame changed to a Random Digit Dialling (RDD) approach wherein 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 includes the broadest cross-section of the population possible in the sample frame. It
includes 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 by RMR 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 by RMR were made to mobile numbers. In 2014, the proportion of mobile numbers called increased to 23%. 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). It was agreed between Roy Morgan Research and OEH to increase the proportion of mobile numbers 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 the Australian household population (which it was – 21.3%). The proportion of mobile phone numbers called by RMR in 2016 was 53.3% of all numbers called.

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 of any diversion from 2008 and 2010 samples:

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

This was used to determine whether respondents called on mobile phones have a significantly greater probability of being selected for the survey because they also have a landline (i.e. if they both a landline and a mobile phone they have a slightly greater chance of being selected as someone with a mobile only or a landline only).

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

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

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

As we already ask a question on the number of children in the household, the above question, in conjunction with this existing question, allows
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. Appointments were made when the eligible respondent was unavailable at the time of call in an attempt to capture an interview at a more suitable time.

3.1.2 Survey Waves

Interviews were conducted every four weeks starting with wave 1 of the 2016 survey on January 4, 2016, with the reference period being the preceding 4 weeks. 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 NSW NPWS managed parks).

In order to understand some of the possible reasons why visitation to NSW NPWS parks fluctuates in each wave, Table 3.1.2 details the dates of interviewing for survey waves 1-13 in 2008, 2010, 2012, 2014 and 2016, the time period for each survey wave relates to 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\(^1\), in total and by state of respondent origin for 2008, 2010, 2012, 2014 and 2016.

Please note that all holiday periods listed for 2016 correspond to the same holiday periods in 2008, 2012 and 2012, with the following exceptions:

- Easter fell in wave 4 in 2008 compared to wave 5 in 2010, 2012 and 2014, while Easter spanned both waves 4 and 5 in 2016;
- May school holidays in ACT spanned wave 5 and wave 6 in 2016;
- June school holidays in Victoria and Southeast Queensland spanned waves 7 and 8 in 2008 and 2010, but only one wave in 2012 and 2014. In 2016 the June school holidays fell across waves 7 and 8 in Southeast Queensland;
- In 2012 Queensland moved the Queen’s Birthday public holiday to October in perpetuity. However, in order to avoid disruption to business planning, the original June Queen’s Birthday holiday was retained in 2012 (This resulted in two Queen’s Birthday holidays in the same year - 2012);

\(^1\) The visitation estimate does not include visits from non-surveyed states or regions within states.
In 2016 the Queensland Labour Day holiday spanned both waves 5 and 6; and
The ACT introduced a Family & Community Day public holiday in 2011 which fell in wave 12 in 2012 and wave 11 in 2014 and 2016.

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 and 2016 surveys to make analysis by season and time of the year more easily understandable.

Table 3.1.2: Survey Waves and School/Holiday Incidence - Summary

<table>
<thead>
<tr>
<th>Wave</th>
<th>Visitation Period</th>
<th>Survey Period</th>
<th>NSW &amp; VIC</th>
<th>ACT</th>
<th>SE QLD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wave 1</td>
<td>7 Dec 2015 - 10 Jan 2016</td>
<td>4 Jan - 10 Jan 2016</td>
<td>School Holidays Christmas Boxing Day New Year</td>
<td>School Holidays Christmas Boxing Day New Year</td>
<td>School Holidays Christmas Boxing Day New Year</td>
</tr>
<tr>
<td>2016 Visits</td>
<td>4,851,469</td>
<td>3,736,719</td>
<td>666,248</td>
<td>56,585</td>
<td>391,917</td>
</tr>
<tr>
<td>Wave 2</td>
<td>4 Jan - 8 Feb 2016</td>
<td>8 Feb 2016</td>
<td>School Holidays Australia Day</td>
<td>School Holidays Australia Day</td>
<td>School Holidays Australia Day</td>
</tr>
<tr>
<td>2016 Visits</td>
<td>5,474,623</td>
<td>4,733,649</td>
<td>414,333</td>
<td>93,263</td>
<td>233,378</td>
</tr>
<tr>
<td>2016 Visits</td>
<td>2,741,887</td>
<td>2,498,193</td>
<td>95,691</td>
<td>88,340</td>
<td>106,483</td>
</tr>
<tr>
<td>2016 Visits</td>
<td>2,891,079</td>
<td>2,489,179</td>
<td>244,248</td>
<td>26,572</td>
<td>129,080</td>
</tr>
<tr>
<td>Wave 5</td>
<td>28 Mar - 3 May 2016</td>
<td>28 Mar - 3 May 2016</td>
<td>School Holidays</td>
<td>School Holidays</td>
<td>School Holidays</td>
</tr>
<tr>
<td>2016 Visits</td>
<td>3,635,797</td>
<td>3,252,777</td>
<td>160,127</td>
<td>76,528</td>
<td>106,365</td>
</tr>
<tr>
<td>Wave 6</td>
<td>25 Apr - 29 May 2016</td>
<td>29 May 2016</td>
<td>School Holidays</td>
<td>School Holidays</td>
<td>School Holidays</td>
</tr>
<tr>
<td>2016 Visits</td>
<td>3,770,877</td>
<td>3,646,058</td>
<td>73,619</td>
<td>60,747</td>
<td>56,421</td>
</tr>
</tbody>
</table>

1. The period in which a respondent could have visited a park within the last 4 weeks in each survey wave.
2. The period in which interviews were conducted.
Table 3.1.2: Survey Waves and School/Holiday Incidence – Summary (continued)

<table>
<thead>
<tr>
<th>Wave</th>
<th>Visitation Period</th>
<th>Survey Period</th>
<th>NSW</th>
<th>VIC</th>
<th>ACT</th>
<th>Corresponding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wave 7</td>
<td>23 May - 27 Jun 2016</td>
<td>Queen's B'day</td>
<td>2,682,418</td>
<td>2,207,937</td>
<td>284,638</td>
<td>30,118</td>
</tr>
<tr>
<td></td>
<td>20 Jun - 27 Jun 2016</td>
<td>Queen's B'day</td>
<td>2,361,060</td>
<td>2,201,009</td>
<td>85,100</td>
<td>51,061</td>
</tr>
<tr>
<td></td>
<td></td>
<td>School Holidays</td>
<td>2,082,765</td>
<td>1,955,047</td>
<td>82,411</td>
<td>36,971</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2010 Visits</td>
<td>2,083,064</td>
<td>2,457,645</td>
<td>114,768</td>
<td>74,755</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2008 Visits</td>
<td>2,349,128</td>
<td>2,197,567</td>
<td>40,656</td>
<td>48,525</td>
</tr>
<tr>
<td>Wave 8</td>
<td>20 Jun - 26 Jul 2016</td>
<td>School Holidays</td>
<td>4,418,884</td>
<td>4,172,986</td>
<td>34,417</td>
<td>58,915</td>
</tr>
<tr>
<td></td>
<td>18 Jul - 26 Jul 2016</td>
<td>School Holidays</td>
<td>2,483,826</td>
<td>2,277,874</td>
<td>22,309</td>
<td>94,739</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2014 Visits</td>
<td>2,000,977</td>
<td>1,792,581</td>
<td>126,447</td>
<td>43,560</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2010 Visits</td>
<td>2,864,397</td>
<td>2,681,238</td>
<td>30,668</td>
<td>39,887</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2008 Visits</td>
<td>2,865,917</td>
<td>2,431,012</td>
<td>296,936</td>
<td>59,324</td>
</tr>
<tr>
<td></td>
<td>15 Aug - 22 Aug 2016</td>
<td>Show Day</td>
<td>1,903,730</td>
<td>1,581,501</td>
<td>19,618</td>
<td>28,951</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2014 Visits</td>
<td>2,559,654</td>
<td>2,437,717</td>
<td>14,841</td>
<td>47,908</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2012 Visits</td>
<td>2,409,625</td>
<td>2,170,757</td>
<td>9,576</td>
<td>70,440</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2010 Visits</td>
<td>2,307,400</td>
<td>2,096,677</td>
<td>59,931</td>
<td>77,943</td>
</tr>
<tr>
<td>Wave 10</td>
<td>15 Aug - 19 Sep 2016</td>
<td>School Holidays</td>
<td>3,769,936</td>
<td>3,575,013</td>
<td>97,624</td>
<td>44,860</td>
</tr>
<tr>
<td></td>
<td>12 Sep - 19 Sep 2016</td>
<td>2016 Visits</td>
<td>2,250,668</td>
<td>2,078,805</td>
<td>76,250</td>
<td>37,972</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2012 Visits</td>
<td>1,924,190</td>
<td>1,806,195</td>
<td>21,133</td>
<td>54,635</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2010 Visits</td>
<td>1,970,636</td>
<td>1,766,194</td>
<td>74,264</td>
<td>18,874</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2008 Visits</td>
<td>3,319,275</td>
<td>3,221,417</td>
<td>26,999</td>
<td>29,959</td>
</tr>
<tr>
<td></td>
<td></td>
<td>School Holidays</td>
<td>2,776,295</td>
<td>2,624,740</td>
<td>77,746</td>
<td>20,043</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Grand Final Holiday 2016</td>
<td>2,518,205</td>
<td>2,132,019</td>
<td>32,604</td>
<td>83,729</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2012 Visits</td>
<td>2,971,805</td>
<td>2,479,893</td>
<td>128,132</td>
<td>33,646</td>
</tr>
<tr>
<td></td>
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<td>2014 Visits</td>
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<td>2,058,586</td>
<td>106,083</td>
<td>20,887</td>
</tr>
<tr>
<td></td>
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<td>2012 Visits</td>
<td>1,616,435</td>
<td>1,423,101</td>
<td>65,160</td>
<td>25,582</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2010 Visits</td>
<td>3,450,607</td>
<td>3,316,437</td>
<td>52,402</td>
<td>42,193</td>
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<tr>
<td>Wave 12</td>
<td>10 Oct - 14 Nov 2016</td>
<td>Melbourne Cup</td>
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<td>4,447,569</td>
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<td>3 Nov - 10 Nov 2016</td>
<td>Family &amp; Community Day 2016</td>
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<td>208,509</td>
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<td>2012 Visits</td>
<td>2,304,671</td>
<td>2,058,586</td>
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<td>20,887</td>
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<td>2010 Visits</td>
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<td>2008 Visits</td>
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</table>

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 visitation to NSW NPWS managed parks from the Australian population, the questionnaire was designed to effectively and accurately capture visitation to such 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 NSW NPWS managed, and therefore in scope, a series of questions which allowed for clarification and verification of responses was included. To estimate NSW NPWS park visitation, the questionnaire captures the NSW NPWS park most recently visited, and if more than one NSW NPWS park was visited, up to a further four NSW NPWS parks. All parks nominated were 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, resulted in 13 waves with a recall period of 4 weeks for each wave;
- Other Australian park visitation surveys use this time period, 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 re-calibrate the visitation time period, a comparable time period to that used in the Holiday Tracking Survey was employed.

3.2.2 Qualifying Questions and HTS

Prior to asking specifically about visitation to NSW NPWS parks however, two questions were asked about interstate travel to NSW. These questions were taken from the Roy Morgan Research Holiday Tracking Survey (HTS), and were used (post field) as a means of linking datasets produced from this survey to 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).

‘QHTS1. Thinking back over the last 12 months to your MOST RECENT HOLIDAY of one or more nights away from home. Was the holiday in….?’

1  New South Wales
2  Another Australian State or Territory
3  Overseas
‘QHTS2. Was that holiday in the last 4 weeks?’
‘IF NECESSARY, SAY: That is, SINCE [Date 28 days ago]?’

All respondents who were not residents of NSW were asked a further qualifying question - QTRAVEL. Have you visited New South Wales within the last 4 weeks?
This allowed calculation of visitation to NSW from interstate respondents on day trips (i.e. travelled to NSW in last 4 weeks, but did not stay overnight). Obtaining such data allowed for a more precise estimation of NSW NPWS Park visitation from non-surveyed regions. 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 respondents 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-NSW 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 no potential park visitor is excluded. Subsequent questions were designed to precisely determine the type of park visited and hence qualify those that visited a NSW NPWS-managed park.

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 (NSW NPWS managed or not NSW NPWS-managed) was established.

As the pilot survey indicated that people were sometimes unable to correctly distinguish between a NSW NPWS managed or non-NSW NPWS managed park, the survey was programmed in such a way so as to record as much detail as possible to minimise respondent error.

This was done through the provision (by OEH) of comprehensive ‘look-up’ tables that listed:
• All NSW NPWS managed parks and all known aliases used for each park;
• Non-NSW NPWS parks including state forests (including any aliases), and;
• Names of parks which could be either a NSW NPWS managed or non-NSW NPWS managed.

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

As a number of NSW NPWS-managed parks and State Forests (non-NSW NPWS managed) share the same name, a check question was added to determine the correct park type. Respondents were asked if they knew specifically whether it was a NSW NPWS Park (i.e. a National Park, State Conservation Area or Nature Reserve) or a State Forest. This further assisted in assigning the correct park type at the time of interviewing, assisted post-field cleaning, and minimised the amount of data cleaning required post-field.

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

If respondents were unable to provide the name of the park they had visited and 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 question ‘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 NSW NPWS Park Visits

Once it was ascertained that the respondent had in fact visited a NSW 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 (while also verifying if the children were from the same household as the respondent, or from additional households);
• The activities which they undertook while at the park they most recently visited, and;
• The overall level of satisfaction with the park they most recently visited.

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 NSW NPWS managed or not were asked, and if the park was identified as being NSW NPWS managed, questions on the number of times visited and the numbers of children were replicated.

Questions relating to activities and satisfaction were only asked about the NSW NPWS Park visited most recently, as it was considered that recall of the experiences would be best for one’s most recent visit. Asking these questions about every park visited, could have led to respondent confusion and would also have added significant amounts of time to what was already a long questionnaire, which would have impacted on overall project costs and potentially elevated refusal rates.

If the number of visits claimed by the respondent exceeded 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 these were indeed the correct numbers. This process allowed potential outliers in visitation to be identified or amended at the point of interview, thereby 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 was 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 NSW 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 OEH 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 are as follows:

‘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 and 2016 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 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 weighting¹ 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 (NSW NPWS or non NSW 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, 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 NSW NPWS 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,

¹ 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 December 2013 population of each survey region, based on their age and sex (population data is obtained from the Australian Bureau of Statistics’ National Labour Force Survey: Catalogue 6291.0).
two additional questions were asked of all survey respondents on annual household income, as follows:

‘What is the approximate annual income of your household (i.e. All income earned before any expenses, including tax, are deducted)’; and

IF CAN’T SAY OR PREFER NOT TO SAY HOUSEHOLD INCOME: ‘Well would you say that your approximate annual household income is $65,000 or less per year or more than $65,000 per year?’

3.2.6 New Questions Exploring NSW NPWS Park Visitation

As of wave seven 2016 two new questions were asked of NSW NPWS park visitors in relation reason for visiting each park and purpose of visiting each park, as follows:

‘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’

‘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)’.

3.3 Response Rates and Strike Rates

In order to ensure that the survey estimates are as robust as possible, a key strategy is to establish procedures to ensure that as many people as possible who are asked to complete the survey actually do complete it (i.e. minimise non-response).

3.3.1 Response Rates

Table 3.3.1 highlights sample outcomes of the 2016 survey and compares them with results from the 2014, 2012, 2010 and 2008 surveys, along with Roy Morgan Research Omnibus surveys conducted from 2008 to 2016 at similar times to the survey waves. The response rate is calculated as total interviews as a proportion of eligible contacts.
For the 2010 a survey a new policy was enacted (in consultation with the OEH), to attempt to complete each of the 13 survey waves in the shortest period possible (within 4 days if possible). The main reason for this policy 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 - due do difficulties in chasing quotas over weekend in field, resulting in more quota clean-up having to be undertaken on the Monday when most younger respondents are available after the weekend).

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 was the policy to complete the survey within a 4 day time period. This policy’s introduction meant that fewer calls were made to the same telephone number in an attempt to obtain an interview, meaning that proportionately fewer households had the opportunity to complete the survey from sample attempted (and contacted).

In 2016 it was decided (in consultation with the OEH) 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 to obtain a more representative survey sample and hence a more accurate 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 response rates combined generated an overall response rate of 14.55% in 2012 and 12.62% in 2014.

In 2016, the proportion of mobile numbers called was 53.5% compared with 23.3% in 2014 and 22.0% in 2012. This resulted in the proportion of mobile only respondents surveyed being 22.3% in 2016, a proportion very similar to the actual 2016 proportion of 21.3%. Furthermore, the response rate for mobile numbers improved on both 2012 and 2014 levels to 20.66% in 2016, as did the landline response rate (to 15.27%), resulting in an overall 2016 response rate of 18.13%, the highest response rate achieved since the survey’s
inception in 2008 (See Table 3.3.1). The policy of increasing mobile sample has clearly resulted in a better response rate and a more representative sample in 2016.

One major reason for electing to use a ‘stand-alone’ survey approach for this survey was the belief that such a methodology would provide higher response rates and lower refusal rates than using an omnibus styled survey. Table 3.3.1 shows that the response rate for this survey in 2016 is over 66% higher than that of a shared cost omnibus survey conducted at similar times throughout the year. (18.13% versus 10.91%). It should be noted that shared cost omnibus surveys also use an RDD sampling frame, with the proportion of mobile numbers called set at 50%, which is similar to the parks visitation survey. Therefore, the response rates achieved by the two surveys can be legitimately compared.

This disparity in response rates between the park visitation survey and omnibus surveys is consistent across all survey years. These results clearly show that the stand-alone survey approach provides more precise and reliable estimates of NSW NPWS park visitation than a similar set of questions placed on an omnibus style survey.
### Table 3.3.1: Response Rate Comparison – NSW Parks Surveys compared with Roy Morgan Research Omnibus Surveys

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### Percentages of Eligible Households (%)

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<td>Long Interviews¹</td>
<td>2.47%</td>
<td>2.47%</td>
<td>1.67%</td>
<td>1.71%</td>
<td>1.54%</td>
<td>2.21%</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Short Interviews²</td>
<td>15.66%</td>
<td>15.66%</td>
<td>10.94%</td>
<td>12.85%</td>
<td>11.72%</td>
<td>15.70%</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Total Interviews (Response Rate)</td>
<td>18.13%</td>
<td>18.13%</td>
<td>12.62%</td>
<td>14.55%</td>
<td>13.26%</td>
<td>17.90%</td>
<td>10.91%</td>
<td>10.91%</td>
<td>8.18%</td>
<td>8.63%</td>
<td>8.66%</td>
</tr>
<tr>
<td>Refusals</td>
<td>61.80%</td>
<td>61.80%</td>
<td>58.72%</td>
<td>55.21%</td>
<td>47.77%</td>
<td>59.32%</td>
<td>52.17%</td>
<td>44.76%</td>
<td>51.14%</td>
<td>44.15%</td>
<td>36.19%</td>
</tr>
<tr>
<td>Terminates</td>
<td>13.37%</td>
<td>13.37%</td>
<td>23.37%</td>
<td>23.79%</td>
<td>27.44%</td>
<td>22.66%</td>
<td>23.36%</td>
<td>23.36%</td>
<td>33.09%</td>
<td>44.15%</td>
<td>36.19%</td>
</tr>
<tr>
<td>Appointments³</td>
<td>6.69%</td>
<td>6.69%</td>
<td>2.68%</td>
<td>2.94%</td>
<td>4.09%</td>
<td>11.67%</td>
<td>6.40%</td>
<td>6.40%</td>
<td>6.55%</td>
<td>2.46%</td>
<td>4.01%</td>
</tr>
<tr>
<td>Total Eligible Households (HHs)</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
</tr>
</tbody>
</table>

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 shows 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 NSW NPWS park, the number of times they visited. For all intents and purposes therefore, the higher the strike rate, the more robust the NSW 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 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.

Using field outcome data obtained from the survey pilot 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 3.3.2 shows that the final strike rates for 2008, 2010, 2012, 2014 and 2016 were respectively 12.29%, 11.66%, 11.71%, 13.27% and 13.63%. The five strike rate figures can be considered to be close to identical, indicating that original strike rate estimates were accurate.

As can be seen in the table 3.3.2, the actual strike rates per region of interview for 2016 were similar to or generally improved upon the strike rates obtained in 2014, with strike rates for respondents in Sydney, remainder NSW, Melbourne, remainder VIC and Brisbane at their highest recorded levels.

**Table 3.3.2: Survey Strike Rates**

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>Sydney</td>
<td>30.16%</td>
<td>29.61%</td>
<td>24.86%</td>
<td>25.15%</td>
<td>25.78%</td>
<td>28.64%</td>
</tr>
<tr>
<td>Remainder NSW</td>
<td>24.77%</td>
<td>23.97%</td>
<td>22.07%</td>
<td>21.24%</td>
<td>23.10%</td>
<td>25.58%</td>
</tr>
<tr>
<td>Total NSW</td>
<td>27.77%</td>
<td>27.10%</td>
<td>23.62%</td>
<td>23.45%</td>
<td>24.49%</td>
<td>27.28%</td>
</tr>
<tr>
<td>Melbourne</td>
<td>1.72%</td>
<td>1.65%</td>
<td>1.61%</td>
<td>1.38%</td>
<td>1.50%</td>
<td>2.23%</td>
</tr>
<tr>
<td>Remainder VIC</td>
<td>3.67%</td>
<td>3.06%</td>
<td>3.07%</td>
<td>2.76%</td>
<td>2.40%</td>
<td>2.23%</td>
</tr>
<tr>
<td>ACT</td>
<td>14.23%</td>
<td>14.63%</td>
<td>13.14%</td>
<td>12.82%</td>
<td>16.07%</td>
<td>9.80%</td>
</tr>
<tr>
<td>Brisbane</td>
<td>3.69%</td>
<td>3.06%</td>
<td>2.82%</td>
<td>3.17%</td>
<td>3.59%</td>
<td>2.23%</td>
</tr>
<tr>
<td>Remainder SE QLD</td>
<td>3.21%</td>
<td>3.01%</td>
<td>2.66%</td>
<td>3.32%</td>
<td>3.98%</td>
<td>2.23%</td>
</tr>
<tr>
<td>Total Interstate</td>
<td>5.18%</td>
<td>5.00%</td>
<td>4.56%</td>
<td>4.65%</td>
<td>5.29%</td>
<td>3.74%</td>
</tr>
<tr>
<td>Overall Strike Rate</td>
<td><strong>13.63%</strong></td>
<td><strong>13.27%</strong></td>
<td><strong>11.71%</strong></td>
<td><strong>11.66%</strong></td>
<td><strong>12.29%</strong></td>
<td><strong>12.57%</strong></td>
</tr>
</tbody>
</table>

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

Questionnaire length varies depending on whether a respondent lived within NSW or interstate, and whether they had or had not visited a park within the last 4 weeks. Table 3.4 illustrates average questionnaire lengths for 2008 to 2016.

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 NSW NPWS park visitation were asked of all NSW NPWS park visitors for each NSW NPWS park they visited (i.e. they could have been asked up to 5 times). From wave 11 onwards all NSW and ACT respondents were asked four questions on NSW NPWS park visitation advertising. Interestingly, even with these extra questions overall questionnaire length for park visitors reduced (from 5.73 in 2014 to 4.78 in 2016 – most likely due increased efficiency brought about by interviewers knowing their parks in 2016), while questionnaire length for non-park visitors increased (from 1.90 minutes in 2014 to 2.20 minutes in 2016).

Table 3.4.1: Average Questionnaire Length – By Type by Year

<table>
<thead>
<tr>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>NSW Questionnaire</td>
<td>4.81</td>
<td>5.70</td>
<td>5.73</td>
<td>5.21</td>
<td>4.92</td>
<td>2.45</td>
<td>2.05</td>
<td>2.00</td>
<td>1.54</td>
<td>1.45</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interstate Questionnaire</td>
<td>4.68</td>
<td>5.83</td>
<td>5.60</td>
<td>5.55</td>
<td>5.14</td>
<td>2.09</td>
<td>1.83</td>
<td>1.76</td>
<td>1.33</td>
<td>1.24</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall Questionnaire</td>
<td>4.78</td>
<td>5.73</td>
<td>5.70</td>
<td>5.29</td>
<td>4.98</td>
<td>2.20</td>
<td>1.90</td>
<td>1.84</td>
<td>1.40</td>
<td>1.31</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The objective is to keep the overall average questionnaire length (i.e. those going through park visitor questions and those who didn’t) to just over 2½ minutes on average for all 13 waves (2.52 minutes with all these new questions added) in order to keep within cost parameters. The average interview length in 2016 was 2.55 minutes, marginally exceeding this objective.

Table 3.4.2: Average Questionnaire Length – By Year

<table>
<thead>
<tr>
<th>Overall Questionnaire Length (mins)</th>
<th>2016</th>
<th>2014</th>
<th>2012</th>
<th>2010</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Questionnaire Length</td>
<td>2.55</td>
<td>2.41</td>
<td>2.29</td>
<td>1.85</td>
<td>1.76</td>
</tr>
</tbody>
</table>

This is largely explained by the greater number of respondents who were asked park visitor questions in 2016 than in other years (on average 164 per wave in 2016 instead of an average of 147 per wave for all previous survey years).
4. CONTINUOUS IMPROVEMENT

In order to ensure that the final NSW NPWS park visitation estimate obtained was as accurate as possible, procedures have been put into place to ensure that the quality of survey data obtained improves as the survey progressed throughout the year. (i.e. from wave to wave).

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

As previously discussed, a key issue emerging from the 2007 pilot study was respondent difficulty in distinguishing between a NSW NPWS managed park and any other park. To address this a variety of quality assurance processes were applied throughout field, and directly afterwards. These 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 NSW NPWS park and a non-NSW NPWS park was added to the park name list);
2. Adding names of non-NSW 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 OEH 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 OEH.

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 NSW NPWS or non-NSW NPWS park status. This was achieved via the following process:

1. Roy Morgan Research received all other specify / can’t say responses pertaining to park name / park location / park type for review;
2. Roy Morgan Research 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 Research, 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 OEH for review, input, and final approval.
Figure 4.1 highlights the effectiveness of this approach with the proportion of respondents directly providing the name of the park increasing with each survey, with 95% of all parks identified in 2016 being named directly by the respondent (via their name or the nearest town to them, up from 85% in 2008) – the highest level recorded. In addition, the proportion of parks identified by the respondent only naming the park type is declining over time, while the proportion of parks imputed in 2016 was the lowest recorded (1%), indicating that park allocation is becoming increasingly efficient with time.

Figure 4.1: Allocation of Park Type by Method

1. 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).

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 NSW NPWS park visitation estimate and an
explanation provided as to how they have been addressed when 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 NSW NPWS park visitation based on responses of those who complete the survey could be an over-estimate. For the 2016, 2014, 2012 and 2010 surveys 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, have you visited a park like a National Park in New South Wales?*

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

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

2. **Telescoping** – there may be a tendency for respondents to over-estimate the 4 week time period for visiting a park, thereby over-estimating NSW 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 and 2016 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 in a number of ways.

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 (26% of households in 2016, up from 6% in 2008). These households tend to be younger and are likely to have differing park visitation habits to other households (e.g. this survey shows that younger people tend to have lower levels of visitation to NSW 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 NSW 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 1.6% of the overall 2016 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:
a.  *Imputation rules for missing data or ‘can’t say’* – manual editing of data post-field can identify a park not previously recognised as a NSW 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

b.  *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 NSW NPWS park visitation estimate. For more detail, please refer to Appendix 7 in either of the relevant survey reports.

5. **METHOD OF CALCULATING NSW NPWS PARK VISITATION**

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

1. Calculation of 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. Create a ‘proxy’ estimate of visitation for the remaining five regions of Australia (i.e. Remainder QLD, SA, WA, TAS and NT) by using comparative questions on the NSW Parks Visitation Survey and the same questions on the Roy Morgan Research Holiday Tracking Survey (HTS),

The rationale for using a ‘proxy’ estimate method for NSW NPWS park visitation from the remaining five regions of Australia was that these regions have the lowest levels of incidence in visiting NSW in any 4 week period and therefore, the lowest potential incidence of visiting a NSW NPWS Park in NSW. Conducting a survey over a 12-month period in such low incidence regions would not yield viable sample without an inordinate amount of time, effort and resources.

Flow chart 5 provides a summary of the standard visitation calculation.

**Flow Chart 5: Summary of NSW NPWS Parks Annual Visitation Calculation**
5.1 Taking a Robust Approach to Estimating Visitation

For the purposes of this research it was decided that it was better to generate a visitation estimate which errs on the side of caution rather than one which could be unduly inflated.
To ensure this was achieved the following approach was adopted:

- 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;
- Including questions common to the Roy Morgan HTS to enable validation and possible adjustment of survey data;
- Limiting recall of visitation to ‘within the last 4 weeks’;
- Asking respondents to name the park they visited, ensuring that the park visited could be classified as either NSW NPWS or non-NSW 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 NSW NPWS Adult Park Visitation Calculation from Survey Data

A seven step process was conducted to calculate NSW 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 –
   a. were able to directly name the park that they visited within the last 4 weeks;
   b. 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;
   c. could not name the park they visited within the last 4 weeks, but could name the type of park they visited (i.e. NSW NPWS or non-NSW NPWS); and
   d. 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 NSW NPWS park to those naming a non-NSW NPWS park that they visited (i.e. the name of the park provided has been allocated as being either NSW NPWS or non-NSW NPWS);
3. Assume that those only naming the park type visited were correct in their categorisation and allocate them accordingly to the NSW NPWS or NSW NPWS park category;

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);

5. Calculate the unweighted average number of visits to each NSW NPWS park (i.e. exclude from the calculation the “can’t say” and blank fields) – approximately 99% of responses in 2016;

6. Allocate the average number of visits to “can’t say” and blank fields – approximately 1% of NSW NPWS responses in 2016; 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 NSW NPWS Child Park Visitation Calculation from Survey Data

To calculate NSW NPWS park child visitation from survey data a six step process was followed:

1. Use NSW 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:
   a. Assume that if children visited a specific NSW NPWS park with the adult on the most recent visit to that park, the children visited on all visits to that

---

1 Pilot survey results conducted in September-October 2007 indicated that the proportion of respondents incorrectly claiming the park they visited was a NSW NPWS park was balanced out by similar proportions of respondents incorrectly claiming that they visited a non-NSW NPWS park. It was determined that the error factor was so similar that any re-allocation of data toward or away from NSW NPWS Parks for the 2008 to 2016 surveys would not improve survey estimates for visitation to NSW NPWS parks and, as a consequence, no adjustment was made to 2008 to 2016 survey data. The robust approach taken was not to attempt to edit these responses.

2 It was determined that those able to name the park they visited had the greatest likelihood of correct allocation of a park to the NSW NPWS or non-NSW 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).

3 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 NSW NPWS or non-NSW 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.

4 A child is classified as being under 18 years of age.
NSW 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);

b. Assume that if the number of children visiting the NSW 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);

c. If the number of children visiting the NSW NPWS park on the most recent visit is greater than the number of children living in the household, the following calculation applies:

i. If the number of extra 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;

ii. 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:

a. For 0 child households, allocate the mean number of children visiting from all 0 child households visiting a NSW NPWS park where the number of children visiting was provided after data manipulations 2ci and 2cii have been applied;

b. For 1 child households, allocate the mean number of children visiting from all 1 child households visiting a NSW NPWS park, as per 3a above;

c. For 2 child households, allocate the mean number of children visiting from all 2 child households visiting a NSW NPWS park, as per 3a above;

d. For 3 child households, allocate the mean number of children visiting from all 3 child households visiting a NSW NPWS park, as per 3a above;

e. For 4 or more child households, allocate the mean number of children visiting from all 4 or more child households visiting a NSW 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

---

1 Extra children is calculated as number of children visiting that specific NSW NPWS park on the respondent’s most recent visit to that park, less the number of children living in the respondent’s household.
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 NSW NPWS park by the number of eligible\(^1\) children visiting that park on the most recent visit – i.e. raw child visits

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 NSW NPWS Park and sum to obtain total visits.

5.4 Total NSW NPWS Park Visitation Calculation from Survey Data

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

1. Sum the number of adult visits to a NSW 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 NSW 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 NSW NPWS visits from survey data.

5.5 NSW NPWS Park Visitation Calculation for Non-surveyed Regions

Roy Morgan Research 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:

\[\text{QHTS1. Thinking back over the last 12 months to your MOST RECENT HOLIDAY of one or more nights away from home. Was the holiday in...?}\]

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

\[\text{QHTS2. Was that holiday in the last 4 weeks?}\]

1. Yes
2. No

\(^1\) 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.
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 NSW 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 NSW NPWS park visitation from non-surveyed regions, using HTS data as a proxy, is that the proportion of adult visitors to a NSW 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 NSW NPWS park. This ratio of visitation is then applied across non-surveyed regions to calculate the proportion of adults visiting NSW 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 NSW NPWS park.

To calculate child visitation for these non-survey regions the key assumption made is that child visitation to a NSW 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 NSW NPWS Park Visitation Estimate Revision to Account for Sample Frame Change

As the 2012, 2014 and 2016 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 and 2016 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:

1. 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;
2. Calculate percentage difference in the 2012 visitation estimate for both adult child visitation with respondents from mobile only households excluded;
3. Use Roy Morgan Single Source data to determine the percentage of mobile only households in 2008, 2010 and 2012;
4. 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;
5. 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, NSW NPWS Branch, Region (as defined at that time) and Individual Park also had to be adjusted so that they summed to the revised visitation estimates for 2008 and 2010.

6. ANNUAL VISITATION ESTIMATE CALCULATION

6.1 Summary of Visitation Estimate

The 2016 annual NSW NPWS park visitation estimate after the conclusion of surveying (and including calculation of visitation from non-surveyed states) is:

- 42,495,513 Annual Adult Visitation Estimate
- 9,281,310 Annual Child Visitation Estimate
51,776,823 Annual Total Visitation Estimate

The 2016 visitation estimate is the highest yet recorded. It is 31.3% higher than the 2014 estimate (39,436,048), 45.9% higher than the 2012 estimate (35,495,625), 53.0% higher than the adjusted 2010 estimate (33,843,626) and 36.5% higher than the adjusted 2008 estimate (37,927,616).

6.2 Calculating the Visitation Estimate

6.2.1 Annual Visitation from Survey Data

Estimated annual visitation to NSW NPWS parks is calculated using the following formula:

Annual NSW 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 following sections describe each component of the estimate calculation.

6.2.2 Adult Visitation from Survey Data (Unadjusted)

Table 6.2.2 shows adult visitation to NSW NPWS parks by region of origin (i.e. survey region), based solely on survey data. It demonstrates that intrastate visitation in 2016, 2014, 2012, 2010 and 2008 (i.e. visitation from adults from Sydney and the remainder of NSW) constitutes more than 90% of all adult visits (91.9% - 2016; 92.2% - 2014; 92.3% - 2012; 92.2% - 2010; 91.9% - 2008). Interstate visitation generally constitutes around 8% of all adult visits.

<table>
<thead>
<tr>
<th>Adult Visits</th>
<th>Sydney</th>
<th>Rem NSW</th>
<th>ACT</th>
<th>Melbourn</th>
<th>Rem VIC</th>
<th>Brisb</th>
<th>Rem SE QLD</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>29,340,681</td>
<td>19,283,121</td>
<td>664,790</td>
<td>1,233,362</td>
<td>755,857</td>
<td>1,093,475</td>
<td>565,028</td>
<td>52,936,313</td>
</tr>
<tr>
<td>2014</td>
<td>31,170,105</td>
<td>16,872,905</td>
<td>799,762</td>
<td>883,076</td>
<td>586,123</td>
<td>1,279,176</td>
<td>497,960</td>
<td>52,089,107</td>
</tr>
<tr>
<td>2012</td>
<td>23,180,212</td>
<td>13,734,851</td>
<td>606,660</td>
<td>948,561</td>
<td>396,057</td>
<td>617,054</td>
<td>516,654</td>
<td>40,000,051</td>
</tr>
<tr>
<td>2010</td>
<td>24,461,077</td>
<td>13,504,242</td>
<td>703,853</td>
<td>551,148</td>
<td>361,080</td>
<td>799,600</td>
<td>795,125</td>
<td>41,176,125</td>
</tr>
<tr>
<td>2008</td>
<td>24,937,199</td>
<td>15,665,180</td>
<td>682,956</td>
<td>1,316,305</td>
<td>363,321</td>
<td>559,223</td>
<td>656,074</td>
<td>44,180,260</td>
</tr>
</tbody>
</table>

6.2.3 Child Visitation from Survey Data (Unadjusted)

Child visitation to NSW NPWS parks is calculated differently to adult visitation, because age and gender data is not collected for each child visiting as part of the survey. Child visitation data could not be weighted by age, sex and region as this is not collected however, number of children living in the household was collected so this variable, along with region of origin for adults, were used to weight child visitation data.
Table 6.2.3-1 highlights the number child visits to NSW NPWS parks by number of children living in the household. Of note is the marked decline from 2008 to 2012 in the number and proportion of child visits from households with no children living in them (e.g. grandparents taking their grandchildren on a visit, school teachers taking pupils etc.). In 2008 over one third of child visits came from households with no children (35.3%), while in 2012 this group’s contribution to child visitation had fallen to 9.0%. However, contribution from households with no children rebounded slightly in 2014 and 2016 to 13.5% and 13.1% respectively. The two most evident changes in child visitation in 2016 from 2014 levels are the decrease in contribution to visitation from households with 1 child (from 21.6% down to 17.2%) and the comparable increase in contribution to visitation from households with 3 children (from 17.9% up to 22.5%).

Table 6.2.3-1: Estimated No. of Child Visits by Children in the Household (Unadjusted)

<table>
<thead>
<tr>
<th>Child Visits</th>
<th>0 Child Households</th>
<th>1 Child Households</th>
<th>2 Child Households</th>
<th>3 Child Households</th>
<th>4+ Child Households</th>
<th>Total Households</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>1,511,071</td>
<td>1,988,351</td>
<td>4,545,128</td>
<td>2,596,410</td>
<td>899,582</td>
<td>11,542,542</td>
</tr>
<tr>
<td>2014</td>
<td>1,764,403</td>
<td>2,810,789</td>
<td>5,101,398</td>
<td>2,333,645</td>
<td>793,486</td>
<td>13,040,669</td>
</tr>
<tr>
<td>2012</td>
<td>842,222</td>
<td>1,174,471</td>
<td>3,559,805</td>
<td>2,440,984</td>
<td>1,389,177</td>
<td>9,406,659</td>
</tr>
<tr>
<td>2010</td>
<td>1,294,248</td>
<td>1,741,682</td>
<td>4,166,142</td>
<td>1,794,088</td>
<td>1,008,865</td>
<td>10,005,026</td>
</tr>
<tr>
<td>2008</td>
<td>3,448,526</td>
<td>1,571,218</td>
<td>2,185,440</td>
<td>1,895,168</td>
<td>664,968</td>
<td>9,765,320</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>% Contribution</th>
<th>0 Child Households</th>
<th>1 Child Households</th>
<th>2 Child Households</th>
<th>3 Child Households</th>
<th>4+ Child Households</th>
<th>Total Households</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>13.1%</td>
<td>17.2%</td>
<td>39.4%</td>
<td>22.5%</td>
<td>7.8%</td>
<td>100.0%</td>
</tr>
<tr>
<td>2014</td>
<td>13.5%</td>
<td>21.6%</td>
<td>39.1%</td>
<td>17.9%</td>
<td>6.1%</td>
<td>100.0%</td>
</tr>
<tr>
<td>2012</td>
<td>9.0%</td>
<td>12.5%</td>
<td>37.8%</td>
<td>25.9%</td>
<td>14.8%</td>
<td>100.0%</td>
</tr>
<tr>
<td>2010</td>
<td>12.9%</td>
<td>17.4%</td>
<td>41.6%</td>
<td>17.9%</td>
<td>10.1%</td>
<td>100.0%</td>
</tr>
<tr>
<td>2008</td>
<td>35.3%</td>
<td>16.1%</td>
<td>22.4%</td>
<td>19.4%</td>
<td>6.8%</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

The breakdown by region in table 6.2.3-2 reveals that in 2016, the contribution of intrastate child visits to all child visits was at the lowest recorded at 88.3% (93.4% - 2014; 90.4% - 2012; 89.3% - 2010; 91.5% in 2008), with contribution from interstate visits at its highest at 11.7% (6.6% - 2014; 9.6% - 2012; 10.7% - 2010; and 8.5% in 2008).

Table 6.2.3-2: Estimated No. NSW NPWS Park Child Visits by Survey Region (Unadjusted)

<table>
<thead>
<tr>
<th>Child Visits</th>
<th>Sydney</th>
<th>Rem NSW</th>
<th>ACT</th>
<th>Melbourne</th>
<th>Rem VIC</th>
<th>Brisbane</th>
<th>Rem SE QLD</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>5,966,066</td>
<td>4,201,043</td>
<td>170,626</td>
<td>403,150</td>
<td>181,801</td>
<td>167,727</td>
<td>432,129</td>
<td>11,542,542</td>
</tr>
<tr>
<td>2014</td>
<td>8,093,988</td>
<td>3,868,752</td>
<td>204,061</td>
<td>237,383</td>
<td>130,062</td>
<td>190,995</td>
<td>76,480</td>
<td>12,803,721</td>
</tr>
<tr>
<td>2012</td>
<td>5,195,139</td>
<td>3,303,904</td>
<td>206,820</td>
<td>190,859</td>
<td>104,748</td>
<td>181,110</td>
<td>224,078</td>
<td>9,406,659</td>
</tr>
<tr>
<td>2010</td>
<td>5,721,350</td>
<td>3,216,259</td>
<td>198,245</td>
<td>105,049</td>
<td>109,198</td>
<td>356,619</td>
<td>298,305</td>
<td>10,005,026</td>
</tr>
<tr>
<td>2008</td>
<td>5,457,863</td>
<td>3,473,977</td>
<td>165,277</td>
<td>155,522</td>
<td>71,086</td>
<td>134,190</td>
<td>307,406</td>
<td>9,765,320</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>% Contribution</th>
<th>Sydney</th>
<th>Rem NSW</th>
<th>ACT</th>
<th>Melbourne</th>
<th>Rem VIC</th>
<th>Brisbane</th>
<th>Rem SE QLD</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>51.9%</td>
<td>36.4%</td>
<td>1.5%</td>
<td>3.5%</td>
<td>1.6%</td>
<td>1.5%</td>
<td>3.7%</td>
<td>100.0%</td>
</tr>
<tr>
<td>2014</td>
<td>63.2%</td>
<td>30.2%</td>
<td>1.6%</td>
<td>3.9%</td>
<td>1.0%</td>
<td>1.5%</td>
<td>0.6%</td>
<td>100.0%</td>
</tr>
<tr>
<td>2012</td>
<td>55.2%</td>
<td>35.1%</td>
<td>2.2%</td>
<td>2.0%</td>
<td>1.1%</td>
<td>1.9%</td>
<td>2.4%</td>
<td>100.0%</td>
</tr>
<tr>
<td>2010</td>
<td>57.2%</td>
<td>32.1%</td>
<td>2.0%</td>
<td>1.0%</td>
<td>1.1%</td>
<td>3.6%</td>
<td>3.0%</td>
<td>100.0%</td>
</tr>
<tr>
<td>2008</td>
<td>55.9%</td>
<td>35.6%</td>
<td>1.7%</td>
<td>1.6%</td>
<td>0.7%</td>
<td>1.4%</td>
<td>3.1%</td>
<td>100.0%</td>
</tr>
</tbody>
</table>
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 have different park visitation patterns to those surveyed); and (2) time period telescoping (i.e. respondents recall 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 of concern, non-response and sampling frame change are discussed below.

6.2.4.1 Adjustment for Non-response

The questionnaire was designed to address non-response bias (and at the same time minimise the telescoping effect) as follows.

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 (telescoping), as follows:

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

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

The effects of non-response bias and telescoping have been assessed as one net effect as procedures put in place to measure their effects have been undertaken since wave 1 of the 2010 survey. It is extremely difficult to separate the individual effect of non-response bias from telescoping effects however, it is considered 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 so long as the combined effect of both issues is accounted for in the overall NSW NPWS park visitation estimate.

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 made
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 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 NSW NPWS parks as it is to non-NSW NPWS parks.

Table 6.2.4.1-1 highlights the method of calculating the non-response adjustment figure for waves 1-13 of the 2016 survey and compares adjustment factors with the 2014, 2012, 2010 and 2008 surveys.

Overall the non-response adjustment factor for 2016 was the highest of all five surveys, with 2014 having the lowest adjustment factor.

Table 6.2.4.1-1: Non-response Adjustment by Region 2016

<table>
<thead>
<tr>
<th>Contact Type - Waves 1-13 2016</th>
<th>Total</th>
<th>Sydney</th>
<th>Rem NSW</th>
<th>ACT</th>
<th>Mel bourne</th>
<th>Rem VIC</th>
<th>Bris bane</th>
<th>Rem SE QLD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes - Visited a NSW Park 1</td>
<td>988</td>
<td>288</td>
<td>225</td>
<td>295</td>
<td>29</td>
<td>19</td>
<td>55</td>
<td>77</td>
</tr>
<tr>
<td>No - Did Not Visit a NSW Park</td>
<td>11,187</td>
<td>1,255</td>
<td>1,279</td>
<td>2,644</td>
<td>1,022</td>
<td>1,018</td>
<td>1,936</td>
<td>2,033</td>
</tr>
<tr>
<td>Total Contacted, Not Surveyed</td>
<td>36,468</td>
<td>5,778</td>
<td>5,219</td>
<td>6,574</td>
<td>4,528</td>
<td>3,060</td>
<td>5,391</td>
<td>5,718</td>
</tr>
<tr>
<td>Adjusted Yes - Not Surveyed 2</td>
<td>3,189</td>
<td>1,113</td>
<td>813</td>
<td>701</td>
<td>112</td>
<td>66</td>
<td>174</td>
<td>210</td>
</tr>
<tr>
<td>Adjusted No - Not Surveyed</td>
<td>33,279</td>
<td>4,665</td>
<td>4,406</td>
<td>5,873</td>
<td>4,416</td>
<td>2,994</td>
<td>6,417</td>
<td>5,508</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contact Type - Waves 1-13 2014</th>
<th>Total</th>
<th>Sydney</th>
<th>Rem NSW</th>
<th>ACT</th>
<th>Mel bourne</th>
<th>Rem VIC</th>
<th>Bris bane</th>
<th>Rem SE QLD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes - Visited a NSW Park 1</td>
<td>2,137</td>
<td>983</td>
<td>646</td>
<td>279</td>
<td>45</td>
<td>48</td>
<td>73</td>
<td>63</td>
</tr>
<tr>
<td>No - Did Not Visit a NSW Park</td>
<td>13,546</td>
<td>2,276</td>
<td>1,962</td>
<td>1,681</td>
<td>2,567</td>
<td>1,259</td>
<td>1,904</td>
<td>1,847</td>
</tr>
<tr>
<td>Total Contacted, Surveyed</td>
<td>15,683</td>
<td>3,259</td>
<td>2,608</td>
<td>1,960</td>
<td>2,612</td>
<td>1,307</td>
<td>1,977</td>
<td>1,960</td>
</tr>
<tr>
<td>Total Yes - Visited a NSW Park</td>
<td>5,326</td>
<td>2,096</td>
<td>1,459</td>
<td>980</td>
<td>157</td>
<td>114</td>
<td>247</td>
<td>273</td>
</tr>
<tr>
<td>Total No - Did Not Visit a NSW Park</td>
<td>46,255</td>
<td>6,341</td>
<td>6,368</td>
<td>7,554</td>
<td>6,983</td>
<td>4,253</td>
<td>7,321</td>
<td>7,405</td>
</tr>
<tr>
<td>Total Contacted</td>
<td>52,151</td>
<td>9,037</td>
<td>7,827</td>
<td>8,534</td>
<td>7,140</td>
<td>4,367</td>
<td>7,568</td>
<td>7,678</td>
</tr>
<tr>
<td>18 Yrs + Population - Dec 2015</td>
<td>13,772,162</td>
<td>3,848,384</td>
<td>2,107,295</td>
<td>301,394</td>
<td>3,580,230</td>
<td>1,110,367</td>
<td>1,774,690</td>
<td>1,049,802</td>
</tr>
<tr>
<td>Wtd Yes Pop'n - Visited a NSW Park - All Contacts 3</td>
<td>1,522,931</td>
<td>892,455</td>
<td>392,828</td>
<td>34,620</td>
<td>78,851</td>
<td>29,046</td>
<td>57,842</td>
<td>37,290</td>
</tr>
<tr>
<td>Wtd Yes Pop'n - Visited a NSW Park - All Surveyed 4</td>
<td>1,927,385</td>
<td>1,160,774</td>
<td>521,976</td>
<td>42,903</td>
<td>61,681</td>
<td>40,779</td>
<td>65,530</td>
<td>33,744</td>
</tr>
<tr>
<td>Non-response Adjustment Factor Waves 1-13 2016</td>
<td>0.7902</td>
<td>0.7688</td>
<td>0.7526</td>
<td>0.8069</td>
<td>0.7284</td>
<td>0.7123</td>
<td>0.8827</td>
<td>1.0511</td>
</tr>
<tr>
<td>Non-response Adjustment Factor Waves 1-13 2014</td>
<td>0.5953</td>
<td>0.5927</td>
<td>0.5791</td>
<td>0.5883</td>
<td>0.6674</td>
<td>0.6673</td>
<td>0.6449</td>
<td>0.6868</td>
</tr>
<tr>
<td>Non-response Adjustment Factor Waves 1-13 2012</td>
<td>0.7040</td>
<td>0.6938</td>
<td>0.6692</td>
<td>0.7741</td>
<td>0.8667</td>
<td>0.8158</td>
<td>0.7877</td>
<td>0.9368</td>
</tr>
<tr>
<td>Non-response Adjustment Factor Waves 7-13 2008</td>
<td>0.6560</td>
<td>0.6094</td>
<td>0.6747</td>
<td>0.8155</td>
<td>0.9440</td>
<td>0.8841</td>
<td>0.7334</td>
<td>0.7841</td>
</tr>
</tbody>
</table>

1. Visited within last 4 weeks.
2. Can’t say if visited, Refused to answer question, hung-up before answering.
3. Key assumption that those not giving a definitive response to the question would have answered in the same proportions (i.e. yes, no) as those who did.
4. Sum of adjusted yes and adjusted no with responses to those who were surveyed and answered yes or no.
5. Proportion answering yes multiplied by the 18yrs+ population for all contacts.
6. Proportion answering yes multiplied by the 18yrs+ population for all surveyed.
7. Weighted yes population for all surveyed = Weighted yes population for all contacts.
Table 6.2.4.1-2 shows the non-response adjustment factor calculated for each survey wave in 2016. These adjustment factors are used to calculate the visitation estimate on a wave by wave basis.

Table 6.2.4.1-2: Non-response Adjustment Factor by Wave

<table>
<thead>
<tr>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
<th>Wave 4</th>
<th>Wave 5</th>
<th>Wave 6</th>
<th>Wave 7</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.7455</td>
<td>0.7469</td>
<td>0.8476</td>
<td>0.7547</td>
<td>0.7121</td>
<td>0.7699</td>
<td>0.3455</td>
</tr>
<tr>
<td>Wave 8</td>
<td>Wave 9</td>
<td>Wave 10</td>
<td>Wave 11</td>
<td>Wave 12</td>
<td>Wave 13</td>
<td>Total</td>
</tr>
<tr>
<td>1.4583</td>
<td>0.7904</td>
<td>0.6697</td>
<td>0.7474</td>
<td>0.7009</td>
<td>0.8774</td>
<td>0.7902</td>
</tr>
</tbody>
</table>

The diagnostics detailed in Table 6.2.4.1-3 following show that the proportion of non-survey respondents indicating that ‘yes’ they have visited a park in NSW in the past 4 weeks is consistent across survey years (at around 6.4%), so the 2016 non-response adjustment factor calculated is likely to be accurate. As the 2016 adjustment factor is the highest recorded, the adjusted 2016 visitation estimate will be the least impacted upon by the non-response factor.

Table 6.2.4.1-3: Non-response Adjustment Factor Diagnostics 2016

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Mode EWP - 12% mobiles</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mode EWP - 12% mobiles</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mode RDD - 22% mobiles</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mode RDD - 23% mobiles</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mode RDD - 53% mobiles</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contacts with HHs</td>
<td>132,105</td>
<td>126,599</td>
<td>145,650</td>
<td>103,396</td>
<td></td>
</tr>
<tr>
<td>Gave a Yes/No Response to REFQ</td>
<td>Calculated</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gave a Yes Response to REFQ</td>
<td>only on the last 6 waves</td>
<td>2,788</td>
<td>2,964</td>
<td>2,121</td>
<td>1,543</td>
</tr>
<tr>
<td>% giving a Yes response of total Yes/No response</td>
<td>6.8%</td>
<td>6.5%</td>
<td>5.8%</td>
<td>6.6%</td>
<td></td>
</tr>
</tbody>
</table>

When the 2016 non-response factor is analysed separately by calls made to landlines and calls made to mobile numbers, the landline adjustment factor is calculated to be 0.7406, while the mobile adjustment factor is calculated to be 0.9106. Similarly, the 2014 landline adjustment factor calculated is 0.5602, while the 2014 mobile adjustment factor is 0.7392. This means that survey data obtained from calls to mobile numbers is closer to the real picture than survey data obtained from landline numbers in 2016.

The 2016 survey contacted 53% of respondents via mobile numbers compared with 12% in 2008 and 2010, 22% in 2012 and 23% 2014. The 2016 sample also obtained a close to proportional match of households by phone status compared with the actual survey population (i.e. around 22% of numbers surveyed in 2016 came from mobile only households – which is close to the proportion in the actual population – 26%). Therefore, if the tendency to obtain a more accurate visitation estimate from mobile numbers rather than from landline numbers applies across all survey years (which is in fact the case in 2014 and 2016), then the adjusted visitation estimates calculated for years 2008 to 2014 are likely to be somewhat lower than actual visitation for those years.
In fact, recalculating the 2014 non-response adjustment factor to account for (1) the under-sampling of mobile numbers and (2) that mobile numbers are more likely to provide a more representative estimate of NSW NPWS park visitation, results in a higher visitation estimate for 2014 – 42.1m visits – a figure 9.1% higher than the actual 2014 survey estimate published (38.6m visits). This is because:

- The proportion of mobile numbers surveyed in 2014 is too low to obtain a representative proportion of mobile only households;
- The non-adjustment estimate is closer to reality for respondents called on mobile numbers than for respondents called on landline numbers; and
- Whilst 2014 survey data was weighted to account for phone status, the weighting cannot be applied to non-respondents, which impacts on the non-response adjustment estimate (i.e. decreases it slightly).

Similarly, the 2012 survey estimate is more likely to be 36.2m visits rather than the published 34.8m visits (representing an increase of 4%). A similar estimated revision to the 2008 and 2012 estimates cannot be undertaken as there is no data available on whether mobile or landline numbers were called for either survey respondents or survey non-respondents.

6.2.4.2 Adjustment for Sample Frame Changes

As the sampling frame in 2008 and 2010 used the Electronic White Pages and while Random Digit Dialling was used in 2012, 2014 and 2016, an adjustment to the 2008 and 2010 estimate was made in order to accurately compare visitation estimates over time. As discussed in section 5.1.6, the main difference between the two sampling methods is that mobile only households were not 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 6.2.4.2-1.

<table>
<thead>
<tr>
<th></th>
<th>Unadjusted visits - All respondents</th>
<th>Unadjusted Visits - Excluding Mobile only respondents</th>
<th>Factor</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adult visits 2012</td>
<td>40,000,051</td>
<td>39,736,931</td>
<td>99.3422%</td>
<td>0.6578%</td>
</tr>
<tr>
<td>Child visits 2012</td>
<td>9,406,659</td>
<td>9,253,133</td>
<td>98.3679%</td>
<td>1.6321%</td>
</tr>
</tbody>
</table>

The proportion of mobile only households in each year is then used to calculate the Mobile only adjustment factor.
Table 6.2.4.2-2: Proportion of Mobile Only Households – NSW NPWS Survey Regions

<table>
<thead>
<tr>
<th></th>
<th>2008</th>
<th>2010</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>8.3%</td>
<td>14.2%</td>
<td>20.3%</td>
</tr>
<tr>
<td>Households</td>
<td>5.6%</td>
<td>9.4%</td>
<td>13.5%</td>
</tr>
</tbody>
</table>

Source: Roy Morgan Single Source.

The adjustment factor is then calculated by 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 6.2.4.2-3: Adjustment Factor for Sampling Frame Change – 2008 and 2010

<table>
<thead>
<tr>
<th></th>
<th>2008</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adult visits</td>
<td>99.73%</td>
<td>99.54%</td>
</tr>
<tr>
<td>Child visits</td>
<td>99.33%</td>
<td>98.86%</td>
</tr>
</tbody>
</table>

6.2.4.3 Revised Survey Visitation Estimates based on Non-response Adjustment

Adjusted annual NSW NPWS park visitation on a region of origin basis (Table 6.2.4.3) shows that intrastate visitation in 2016 accounts for the lowest proportion of total visits, since surveying commenced (88.8% compared with 91.8% of visits in 2014, 90.4% of visits in 2012; 89.5% in 2010; and 92.4% in 2008). This primarily due to the proportional decline in visits from people living in Sydney compared with previous years (53.8% compared with 60.6% - 2014; 57.3% - 2012; 55.7% - 2010; and 59.5% - 2008).
### Table 6.2.4.3: Adjustment Park Visitation Estimate by Region of Origin

<table>
<thead>
<tr>
<th>Adjustment Calculation</th>
<th>Sydney</th>
<th>Rem NSW</th>
<th>ACT</th>
<th>Mel-bourne</th>
<th>Rem VIC</th>
<th>Bris-bane</th>
<th>Rem SE QLD</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unadjusted Adult visits</td>
<td>29,340,681</td>
<td>19,283,121</td>
<td>664,790</td>
<td>1,233,362</td>
<td>755,857</td>
<td>1,093,475</td>
<td>565,028</td>
<td>52,936,313</td>
</tr>
<tr>
<td>Adult Non-response Adjustment</td>
<td>22,840,314</td>
<td>14,693,397</td>
<td>543,153</td>
<td>1,596,393</td>
<td>545,108</td>
<td>977,254</td>
<td>632,210</td>
<td>41,827,830</td>
</tr>
<tr>
<td>Unadjusted Child visits</td>
<td>5,986,065</td>
<td>4,201,043</td>
<td>170,626</td>
<td>403,150</td>
<td>181,801</td>
<td>167,727</td>
<td>432,129</td>
<td>11,542,542</td>
</tr>
<tr>
<td>Child Non-response Adjustment</td>
<td>4,576,398</td>
<td>3,143,783</td>
<td>136,909</td>
<td>542,254</td>
<td>243,525</td>
<td>223,413</td>
<td>1,107,059</td>
<td>9,120,384</td>
</tr>
<tr>
<td><strong>Total Adjusted Visits</strong></td>
<td>27,416,713</td>
<td>17,837,180</td>
<td>680,062</td>
<td>2,108,861</td>
<td>673,871</td>
<td>1,124,469</td>
<td>1,107,059</td>
<td>50,948,215</td>
</tr>
<tr>
<td>% Contribution</td>
<td>53.8%</td>
<td>35.0%</td>
<td>1.3%</td>
<td>4.1%</td>
<td>1.3%</td>
<td>2.2%</td>
<td>2.2%</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Adjustment Calculation</th>
<th>Sydney</th>
<th>Rem NSW</th>
<th>ACT</th>
<th>Mel-bourne</th>
<th>Rem VIC</th>
<th>Bris-bane</th>
<th>Rem SE QLD</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unadjusted Adult visits</td>
<td>31,170,105</td>
<td>16,872,905</td>
<td>799,726</td>
<td>883,076</td>
<td>586,123</td>
<td>1,279,176</td>
<td>497,960</td>
<td>52,089,107</td>
</tr>
<tr>
<td>Adult Non-response Adjustment</td>
<td>18,565,768</td>
<td>9,819,573</td>
<td>472,802</td>
<td>592,299</td>
<td>393,032</td>
<td>828,945</td>
<td>334,561</td>
<td>31,006,972</td>
</tr>
<tr>
<td>Unadjusted Child visits</td>
<td>8,093,988</td>
<td>3,868,752</td>
<td>204,061</td>
<td>237,383</td>
<td>130,062</td>
<td>190,995</td>
<td>78,480</td>
<td>12,803,721</td>
</tr>
<tr>
<td>Child Non-response Adjustment</td>
<td>4,840,104</td>
<td>2,232,473</td>
<td>120,097</td>
<td>156,027</td>
<td>81,458</td>
<td>118,630</td>
<td>51,671</td>
<td>7,600,461</td>
</tr>
<tr>
<td><strong>Total Adjusted Visits</strong></td>
<td>23,405,872</td>
<td>12,052,045</td>
<td>592,899</td>
<td>748,326</td>
<td>474,490</td>
<td>947,575</td>
<td>386,232</td>
<td>38,607,440</td>
</tr>
<tr>
<td>% Contribution</td>
<td>60.6%</td>
<td>31.2%</td>
<td>1.5%</td>
<td>1.9%</td>
<td>1.2%</td>
<td>2.5%</td>
<td>1.1%</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Adjustment Calculation</th>
<th>Sydney</th>
<th>Rem NSW</th>
<th>ACT</th>
<th>Mel-bourne</th>
<th>Rem VIC</th>
<th>Bris-bane</th>
<th>Rem SE QLD</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unadjusted Adult visits</td>
<td>24,461,077</td>
<td>13,504,242</td>
<td>703,853</td>
<td>551,148</td>
<td>361,080</td>
<td>799,600</td>
<td>795,125</td>
<td>41,176,125</td>
</tr>
<tr>
<td>Adult Non-response Adjustment</td>
<td>15,114,365</td>
<td>9,299,610</td>
<td>475,095</td>
<td>833,710</td>
<td>326,906</td>
<td>584,813</td>
<td>367,971</td>
<td>28,158,528</td>
</tr>
<tr>
<td>Unadjusted Child visits</td>
<td>5,195,139</td>
<td>3,303,904</td>
<td>206,820</td>
<td>190,859</td>
<td>104,748</td>
<td>181,110</td>
<td>224,078</td>
<td>9,406,659</td>
</tr>
<tr>
<td>Child Non-response Adjustment</td>
<td>3,641,563</td>
<td>2,233,970</td>
<td>161,747</td>
<td>167,522</td>
<td>86,342</td>
<td>171,414</td>
<td>159,376</td>
<td>6,621,933</td>
</tr>
<tr>
<td><strong>Total Adjusted Visits</strong></td>
<td>19,911,987</td>
<td>11,533,580</td>
<td>636,843</td>
<td>1,001,232</td>
<td>413,248</td>
<td>756,226</td>
<td>527,347</td>
<td>34,780,462</td>
</tr>
<tr>
<td>% Contribution</td>
<td>57.3%</td>
<td>33.2%</td>
<td>1.8%</td>
<td>2.9%</td>
<td>1.2%</td>
<td>2.2%</td>
<td>1.5%</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Adjustment Calculation</th>
<th>Sydney</th>
<th>Rem NSW</th>
<th>ACT</th>
<th>Mel-bourne</th>
<th>Rem VIC</th>
<th>Bris-bane</th>
<th>Rem SE QLD</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unadjusted Adult visits</td>
<td>24,461,077</td>
<td>13,504,242</td>
<td>703,853</td>
<td>551,148</td>
<td>361,080</td>
<td>799,600</td>
<td>795,125</td>
<td>41,176,125</td>
</tr>
<tr>
<td>Adult Non-response Adjustment</td>
<td>15,114,365</td>
<td>9,299,610</td>
<td>475,095</td>
<td>833,710</td>
<td>326,906</td>
<td>584,813</td>
<td>367,971</td>
<td>28,158,528</td>
</tr>
<tr>
<td>Unadjusted Child visits</td>
<td>5,721,350</td>
<td>3,216,259</td>
<td>198,245</td>
<td>105,049</td>
<td>109,198</td>
<td>356,619</td>
<td>298,305</td>
<td>10,005,026</td>
</tr>
<tr>
<td>Child Non-response Adjustment</td>
<td>3,601,436</td>
<td>2,093,971</td>
<td>159,300</td>
<td>111,491</td>
<td>100,659</td>
<td>274,546</td>
<td>222,386</td>
<td>6,563,789</td>
</tr>
<tr>
<td><strong>Total Adjusted Visits</strong></td>
<td>18,605,442</td>
<td>11,266,899</td>
<td>736,827</td>
<td>635,363</td>
<td>421,710</td>
<td>883,272</td>
<td>849,148</td>
<td>33,378,662</td>
</tr>
<tr>
<td>% Contribution</td>
<td>55.7%</td>
<td>33.8%</td>
<td>2.2%</td>
<td>1.9%</td>
<td>1.3%</td>
<td>2.6%</td>
<td>2.5%</td>
<td>100.0%</td>
</tr>
</tbody>
</table>
Table 6.2.4.3: Adjustment Park Visitation Estimate by Region of Origin (continued)

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

The proportion of visits from the remainder of NSW is higher in 2016 than in any other year (35.0% compared with 31.2% - 2014; 33.2% - 2012; 33.8% - 2010; and 32.9%), as is the proportion of visits from Melbourne (4.1% compared with 1.9% - 2014; 2.9% - 2012; 1.9% - 2010; and 2.6%).

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 or 2014 is significantly higher or lower than the 2016 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 NSW NPWS park visitation may be affected by these events.

Figure 6.2.4.4-1 shows overall visitation wave by wave for survey estimates only and includes the margin of error for each wave. In general, NSW NPWS park visitation in 2016 tended to be higher than in all other years across all months, with the exception of February, March and mid-May to mid-June.

2016 NSW NPWS park visitation was significantly higher than in all other years in January (wave 2), mid-June- mid-August (waves 8 and 9) and in October through to November (waves 12 and 13). 2016 visitation was significantly higher than 2008 visitation in waves 1, 2, 5, 6, 8, 9, 11, 12 and 13, significantly higher than 2010 visitation in waves 1, 2, 5, 6, 8, 9, 10, 12 and 13, significantly higher than 2012 visitation in waves 2, 4, 6, 7, 8, 9, 10, 11, 12 and 13, and significantly higher than 2014 visitation in waves 2, 8, 9, 10, 12 and 13. NSW NPWS Park visitation in 2016 was not significantly lower than in other year for any wave.
As can be seen in Figure 6.2.4.4-2, in general adult visitation in 2016 tends to mirror overall visitation in 2016, with adult visitation significantly higher than in previous years in the same waves listed for overall visitation.

In relation to child visitation to NSW NPWS parks (see Figure 6.2.4.4-3), visitation in 2016 was higher than all other years from (wave 8) 17 June to the end of (wave 13) 12 December. Child visitation tends to be increasing over time in the December-January school holiday period (waves 1-2) and in May (wave 6).

Child visitation in 2016 is significantly higher than 2008, 2012 and 2014 levels in (wave 7) June – school holidays, significantly higher than 2008, 2010 and 2012 levels in (wave 12) October, but significantly lower than 2010 and 2012 levels in (wave 3) February – the lowest child visitation level recorded.
Figure 6.2.4.4-1: Adjusted Annual Visitation Survey Estimate by Wave

- W1 - School holidays; Christmas; New Year
- W2 - School holidays Australia Day
- W3 - School holidays; Australia Day
- W4 - ACT – Canberra Day
- School Holidays
- Anzac Day
- Labour Day QLD 2016
- School hols ACT
- W7 - School holidays – VIC & QLD 2008 & 2010
- Queen’s Birthday
- (QLD 2010, 2016)
- W8 - School holidays
- W9 - QLD - Show Day
- W10 - School holidays VIC 2016
- W11- School holidays; NSW & ACT – Labour Day; ACT - Family & Community Day 2012
- W12 - VIC - Melbourne Cup
- ACT - Family & Community Day 2014
- W13 - School holidays QLD 2016

Significantly lower than 2016 estimate
Significantly higher than 2016 estimate
Figure 6.2.4.4-2: Adjusted Adult Visitation Survey Estimate by Wave

<table>
<thead>
<tr>
<th>Wave</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>W1</td>
<td>School holidays; Christmas, New Year</td>
</tr>
<tr>
<td>W2</td>
<td>School holidays Australia Day; Easter 2008, 2016 School Holidays</td>
</tr>
<tr>
<td>W3</td>
<td>School holidays ACT, Labour Day, ACT - Family &amp; Community Day</td>
</tr>
<tr>
<td>W7</td>
<td>School holidays - VIC &amp; QLD 2008 &amp; 2010, School holidays Arzac Day (QLD 2016) Queen’s Birthday</td>
</tr>
<tr>
<td>W8</td>
<td>QLD - Show Day, School holidays VIC 2016</td>
</tr>
<tr>
<td>W9</td>
<td>QLD - School holidays VIC 2016, School holidays VIC</td>
</tr>
<tr>
<td>W10</td>
<td>School holidays QLD 2016</td>
</tr>
<tr>
<td>W11</td>
<td>School holidays; NSW &amp; ACT – Labour Day, ACT - Family &amp; Community Day</td>
</tr>
<tr>
<td>W13</td>
<td>School holidays QLD 2016</td>
</tr>
</tbody>
</table>

Visits

- Significantly lower than 2016 estimate
- Significantly higher than 2016 estimate
Figure 6.2.4-3: Adjusted Child Visitation Survey Estimate by Wave

<table>
<thead>
<tr>
<th>Wave</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>W1</td>
<td>School holidays; Christmas; New Year</td>
</tr>
<tr>
<td>W2</td>
<td>School holidays; Australia Day</td>
</tr>
<tr>
<td>W3</td>
<td>School holidays; Anzac Day</td>
</tr>
<tr>
<td>W4</td>
<td>ACT – Canberra Day; VIC – Labour Day; Easter 2008, 2016; School Holidays 2016 – VIC, QLD</td>
</tr>
<tr>
<td>W7</td>
<td>VIC - Labour Day 2016; Anzac Day; Queen’s Birthday (QLD 2018, 2010 &amp; 2016)</td>
</tr>
<tr>
<td>W8</td>
<td>QLD - Show Day</td>
</tr>
<tr>
<td>W9</td>
<td>QLD - School holidays</td>
</tr>
<tr>
<td>W10</td>
<td>School holidays VIC 2016</td>
</tr>
<tr>
<td>W11</td>
<td>School holidays; NSW &amp; ACT – Labour Day; ACT - Family &amp; Community Day 2012</td>
</tr>
<tr>
<td>W13</td>
<td>School holidays QLD 2016</td>
</tr>
</tbody>
</table>

**Visits:**

Significantly lower than 2016 estimate

Significantly higher than 2016 estimate
6.2.4.5 Region of Origin of Visits for adjusted survey estimates

Figure 6.2.4.5-1 shows the total number of NSW NPWS park visits by the region of origin of the survey respondent for each survey year. 2016 saw the highest number of visits recorded from each region, with the exception of ACT, for which 2010 remains the highest.

In 2016 a total of 24.7m visits to NSW NPWS parks were made by Sydneysiders, 4.0m higher than the previous high in 2014 (23.4m). NSW NPWS park visits from areas outside Sydney but within NSW reached 17.8m in 2016, 5.8m visits higher than in 2014 (12.1m) and 5.6m visits higher than 2008 (12.3m)

NSW NPWS park visitation in 2016 from people living in Melbourne at 2.1m was more than double the previous high of 1.0m in 2012. Visitation to NSW NPWS parks from people living in the Remainder of Victoria and from Brisbane has been steadily increasing over time. Almost 674,000 people from Remainder Victoria visited NSW NPWS parks in 2016. This was almost 200,000 visits higher than the previous high of 474,000 in 2014. Visits to NSW NPWS parks from Brisbanites reached 1.1m in 2016, over 175,000 visits higher than the 2014 figure of 947,575. Visits from the Remainder of Southeast QLD had been declining since the 2010 high of 849,000 visits, but increased again to 1.1m visits in 2016. This is an increase of almost 258,000 visits on the previous high. NSW NPWS park visits from ACT residents reached over 680,000 in 2016 but this was still almost 57,000 visits short of the high attained in 2010 (736,827 visits).

In terms of percentage contribution to NSW NPWS park visits, figure 6.2.4.5-2 shows that 53.8% of all visits in 2016 originated from people living in Sydney. This is the lowest proportion yet recorded but still over half of all visits. In 2016 35.0% of visits originated from those living in other parts of NSW - the highest proportion yet recorded. Overall 88.8% of NSW NPWS park visits in 2016 originated from people living within the state of NSW which was marginally lower than in all previous years (91.8% - 2014 90.4% - 2012; 89.5% - 2010; and 92.4% - 2008).

Interstate visitors contributed 11.2% of all visits to NSW NPWS parks in 2016 which was the highest percentage yet recorded (8.2% - 2014; 9.6% - 2012; 10.5% 2010; and 7.6% - 2008). The increase in NSW NPWS park visitation from Melbourne was the most marked. In 2016 Melbourne contributed 4.1% of visits greatly exceeding the previous high of 2.9% in 2012. The ACT contributed its lowest proportion of visits in 2016 (1.3%). Visits from this origin market have been declining steadily since 2010 (2.2%).
6.2.5 Annual Visitation, including Non-surveyed Region Estimates

Roy Morgan Research Holiday Tracking Survey (HTS) data is used to calculate visitation to NSW NPWS parks for non-surveyed states. The following information is used:

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

It is assumed for the purpose of calculating estimates that NSW NPWS park visitation rates from non-surveyed regions will be no higher than the incidence rate for the survey region with the lowest incidence rate because the incidence of overnight visitation to NSW will be lower for these regions than it is for Melbourne and Remainder of Victoria. Therefore, the NSW NPWS park visitation calculation for non-surveyed regions is solely based on the NSW 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

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**Figure 6.2.4.5-2: Visitation by Region of Origin – % Contribution to Visits**

![Visitation by Region of Origin](chart.png)
the survey region used in creating the estimate) and also factors in visitation to NSW from non-surveyed interstate urban centres, regional centres and rural communities.

This approach is still however, considered to be likely to generate visitation estimates for 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 that any inflationary effect on the overall survey estimate will be minute.

Applying the combined information for Victoria as the adjustment factor for non-surveyed regions (converted to HTS estimates), Table 6.2.5-1 shows that an estimated total of 828,608 NSW NPWS park visits were made in 2016 to NSW NPWS parks from these non-surveyed regions (667,683 by adults and 160,926 by children). This compares to 559,930 visits in 2014 (459,437 by adults and 100,493 by children), 715,163 visits in 2012 (586,809 by adults and 128,354 by children), 464,964 visits in 2010 (372,710 by adults and 92,254 by children and 688,651 visits in 2008 (608,968 by adults and 79,673 by children).

South Australians still contribute the highest proportion of NSW NPWS park visits of all non-surveyed regions at 35.17% of non-surveyed region visits in 2016 coming from this state. However, this is the lowest result ever for South Australia in in terms of proportional contribution. The remainder of Queensland region rebounded from its low proportion of visits in 2014 (12.19%) to hit 24.23% in 2016.

Table 6.2.5-2 shows that the overall NSW NPWS park visitation estimate for 2016 is 51,776,823 with adult visits contributing 82% and child visits 18% of all visits. This result in terms of relative contribution is similar to previous years (2014 – 80%: 20%; 2012 – 81%:19%; 2010 – 81%:19%; 2008 – 82%:18%).
Table 6.2.5-1: Annual NSW NPWS Park Visitation – Non-survey Regions

<table>
<thead>
<tr>
<th>Non-Survey Regions PWG Park Visitation Calculation</th>
<th>Rem QLD</th>
<th>SA</th>
<th>WA</th>
<th>TAS</th>
<th>NT</th>
<th>VIC Survey Estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adult Population (Dec 2015)</td>
<td>994,053</td>
<td>1,344,943</td>
<td>2,018,196</td>
<td>406,145</td>
<td>120,884</td>
<td>n/a</td>
</tr>
<tr>
<td>Visited PWG Park in last 4 wks</td>
<td>1.18%</td>
<td>1.23%</td>
<td>0.65%</td>
<td>1.04%</td>
<td>2.31%</td>
<td>2.40%</td>
</tr>
<tr>
<td>% PWG Visitors to Overnight Visitors</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>68.94%</td>
</tr>
<tr>
<td>% Estimate of PWG Visitors</td>
<td>0.81%</td>
<td>0.85%</td>
<td>0.45%</td>
<td>0.72%</td>
<td>1.59%</td>
<td>n/a</td>
</tr>
<tr>
<td>No. Adult PWG Visitors per wave</td>
<td>8,087</td>
<td>11,405</td>
<td>9,044</td>
<td>2,912</td>
<td>1,925</td>
<td>n/a</td>
</tr>
<tr>
<td>Annual Adult PWG Park Visitors</td>
<td>105,131</td>
<td>148,268</td>
<td>117,575</td>
<td>37,858</td>
<td>25,028</td>
<td>n/a</td>
</tr>
<tr>
<td>Average PWG Park Visits per Adult</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>1.54</td>
</tr>
<tr>
<td>Annual Adult PWG Park Visits</td>
<td>161,790</td>
<td>228,175</td>
<td>180,941</td>
<td>58,261</td>
<td>38,516</td>
<td>n/a</td>
</tr>
<tr>
<td>% Child to Adult PWG Park visits</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>24.10%</td>
</tr>
<tr>
<td>Annual Child PWG Park Visits</td>
<td>38,995</td>
<td>54,995</td>
<td>43,611</td>
<td>14,042</td>
<td>9,283</td>
<td>n/a</td>
</tr>
<tr>
<td>Total Estimated Annual PWG Visits - 2016</td>
<td>200,785</td>
<td>283,171</td>
<td>224,551</td>
<td>72,303</td>
<td>47,799</td>
<td>n/a</td>
</tr>
<tr>
<td>Contribution to Non-Survey Region PWG Park Visitation</td>
<td>24.23%</td>
<td>34.17%</td>
<td>27.10%</td>
<td>8.73%</td>
<td>5.77%</td>
<td>n/a</td>
</tr>
<tr>
<td>Total Estimated Annual PWG Visits - 2014</td>
<td>68,231</td>
<td>199,484</td>
<td>177,138</td>
<td>49,594</td>
<td>65,483</td>
<td>n/a</td>
</tr>
<tr>
<td>Contribution to Non-Survey Region PWG Park Visitation</td>
<td>12.19%</td>
<td>35.63%</td>
<td>31.64%</td>
<td>8.86%</td>
<td>11.69%</td>
<td>n/a</td>
</tr>
<tr>
<td>Total Estimated Annual PWG Visits - 2012</td>
<td>232,371</td>
<td>293,766</td>
<td>94,502</td>
<td>80,981</td>
<td>13,542</td>
<td>n/a</td>
</tr>
<tr>
<td>Contribution to Non-Survey Region PWG Park Visitation</td>
<td>32.49%</td>
<td>41.08%</td>
<td>13.21%</td>
<td>11.32%</td>
<td>1.89%</td>
<td>n/a</td>
</tr>
<tr>
<td>Total Estimated Annual PWG Visits - 2010</td>
<td>94,608</td>
<td>207,009</td>
<td>109,588</td>
<td>37,865</td>
<td>15,894</td>
<td>n/a</td>
</tr>
<tr>
<td>Contribution to Non-Survey Region PWG Park Visitation</td>
<td>20.35%</td>
<td>44.52%</td>
<td>23.57%</td>
<td>8.14%</td>
<td>3.42%</td>
<td>n/a</td>
</tr>
<tr>
<td>Total Estimated Annual PWG Visits - 2008</td>
<td>176,917</td>
<td>284,948</td>
<td>122,889</td>
<td>88,304</td>
<td>15,593</td>
<td>n/a</td>
</tr>
<tr>
<td>Contribution to Non-Survey Region PWG Park Visitation</td>
<td>25.69%</td>
<td>41.38%</td>
<td>17.84%</td>
<td>12.82%</td>
<td>2.26%</td>
<td>n/a</td>
</tr>
</tbody>
</table>

Table 6.2.5-2 Final Annual NSW NPWS Park Visitation Estimate - Region of Origin shows that non-survey regions contributed 1.6% to the final annual adjusted NSW NPWS park visitation estimate of 51,776,823, contributing the same to the adult visitation estimate of 42,495,513 (1.6%) and a little more to the child visitation estimate of 9,281,310 (1.7%).

Intrastate visitation contributes 87.4% in 2016 compared with 90.5% in 2014, 88.6% in 2012, 88.3% in 2010 and 90.8% in 2008.

Overall, the 2016 NSW NPWS park visitation estimate is 36.5% higher than the 2008 estimate; 53.0% higher than the 2010 estimate, 45.9% higher than the 2012 estimate and 31.3% higher than the 2014 estimate. Growth was evident in both adult and child visitation in 2016. Adult visitation levels had been ranging around 27.3m-31.7m from 2008-2014, but increased by approximately 10.8m adult visits in 2016 to 42,495,513 visits. Child visitation
levels have been ranging around 6.6m-7.8m visits from 2008-2014, but the 2016 figure of 9,281,310 is much higher, up 1.5m visits from 2014.

Table 6.2.5-2: Final Annual NSW NPWS Park Visitation Estimate - Region of Origin (No.)

<table>
<thead>
<tr>
<th>Region of Origin</th>
<th>Adult Visits No.</th>
<th>Adult Visits %</th>
<th>Child Visits No.</th>
<th>Child Visits %</th>
<th>Total Visits No.</th>
<th>Total Visits %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sydney</td>
<td>22,840,314</td>
<td>53.75%</td>
<td>4,576,398</td>
<td>49.31%</td>
<td>27,416,713</td>
<td>52.95%</td>
</tr>
<tr>
<td>Remained NSW</td>
<td>14,693,397</td>
<td>34.58%</td>
<td>3,143,783</td>
<td>33.37%</td>
<td>17,837,180</td>
<td>34.45%</td>
</tr>
<tr>
<td>ACT</td>
<td>543,153</td>
<td>1.28%</td>
<td>136,909</td>
<td>1.48%</td>
<td>680,062</td>
<td>1.31%</td>
</tr>
<tr>
<td>Melbourne</td>
<td>1,596,393</td>
<td>3.76%</td>
<td>512,468</td>
<td>5.52%</td>
<td>2,108,861</td>
<td>4.07%</td>
</tr>
<tr>
<td>Remained VIC</td>
<td>545,108</td>
<td>1.28%</td>
<td>128,763</td>
<td>1.39%</td>
<td>673,871</td>
<td>1.30%</td>
</tr>
<tr>
<td>Brisbane</td>
<td>977,254</td>
<td>2.30%</td>
<td>147,215</td>
<td>1.59%</td>
<td>1,124,469</td>
<td>2.17%</td>
</tr>
<tr>
<td>Remained SE QLD</td>
<td>632,210</td>
<td>1.49%</td>
<td>474,849</td>
<td>5.12%</td>
<td>1,107,059</td>
<td>2.14%</td>
</tr>
<tr>
<td>Remained QLD</td>
<td>161,790</td>
<td>0.38%</td>
<td>38,995</td>
<td>0.42%</td>
<td>200,785</td>
<td>0.39%</td>
</tr>
<tr>
<td>SA</td>
<td>228,175</td>
<td>0.54%</td>
<td>54,995</td>
<td>0.59%</td>
<td>283,171</td>
<td>0.55%</td>
</tr>
<tr>
<td>WA</td>
<td>180,941</td>
<td>0.43%</td>
<td>43,611</td>
<td>0.47%</td>
<td>224,551</td>
<td>0.43%</td>
</tr>
<tr>
<td>TAS</td>
<td>58,261</td>
<td>0.14%</td>
<td>14,042</td>
<td>0.15%</td>
<td>72,303</td>
<td>0.14%</td>
</tr>
<tr>
<td>NT</td>
<td>38,516</td>
<td>0.09%</td>
<td>9,283</td>
<td>0.10%</td>
<td>47,799</td>
<td>0.09%</td>
</tr>
<tr>
<td><strong>Total Australia 2016</strong></td>
<td><strong>42,495,513</strong></td>
<td><strong>100.00%</strong></td>
<td><strong>9,281,310</strong></td>
<td><strong>100.00%</strong></td>
<td><strong>51,776,823</strong></td>
<td><strong>100.00%</strong></td>
</tr>
<tr>
<td>Margin of Error$^2$</td>
<td>±2.83%</td>
<td>n/a</td>
<td>±7.34%</td>
<td>n/a</td>
<td>±3.64%</td>
<td>n/a</td>
</tr>
<tr>
<td>Total Australia 2014</td>
<td>31,674,661</td>
<td>100.00%</td>
<td>7,761,387</td>
<td>100.00%</td>
<td>39,436,048</td>
<td>100.00%</td>
</tr>
<tr>
<td>Margin of Error$^2$</td>
<td>±2.84%</td>
<td>n/a</td>
<td>±7.99%</td>
<td>n/a</td>
<td>±3.85%</td>
<td>n/a</td>
</tr>
<tr>
<td>Total Australia 2012</td>
<td>28,745,537</td>
<td>100.00%</td>
<td>7,602,637</td>
<td>100.00%</td>
<td>36,348,174</td>
<td>100.00%</td>
</tr>
<tr>
<td>Margin of Error$^2$</td>
<td>±2.90%</td>
<td>n/a</td>
<td>±8.02%</td>
<td>n/a</td>
<td>±3.87%</td>
<td>n/a</td>
</tr>
<tr>
<td>Total Australia 2010</td>
<td>27,262,279</td>
<td>100.00%</td>
<td>6,581,347</td>
<td>100.00%</td>
<td>33,843,626</td>
<td>100.00%</td>
</tr>
<tr>
<td>Margin of Error$^2$</td>
<td>±3.18%</td>
<td>n/a</td>
<td>±7.44%</td>
<td>n/a</td>
<td>±4.00%</td>
<td>n/a</td>
</tr>
<tr>
<td>Total Australia 2008</td>
<td>31,128,875</td>
<td>100.00%</td>
<td>6,788,741</td>
<td>100.00%</td>
<td>37,927,616</td>
<td>100.00%</td>
</tr>
<tr>
<td>Margin of Error$^2$</td>
<td>±3.34%</td>
<td>n/a</td>
<td>±4.40%</td>
<td>n/a</td>
<td>±3.54%</td>
<td>n/a</td>
</tr>
</tbody>
</table>

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

A 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 would simply be a multiplication of the survey estimate by a constant.

The confidence limits$^{13}$ for this study (at the industry accepted 95% confidence level) in 2016 are as follows:

```
13 The Mean, Standard Error of Mean and Confidence Limits on Mean for NSW NPWS adult and child park visits have been calculated using the EXAMINE function in SPSS. SPSS uses the following formula for the Confidence Interval for the Mean:
Lower bound = \( \bar{y} - t_{\alpha/2} \times W^{-1} \times SE \)
Upper bound = \( \bar{y} + t_{\alpha/2} \times W^{-1} \times SE \)
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.
```
±2.83% Annual Adult Visitation Estimate confidence limit
±7.34% Annual Child Visitation Estimate confidence limit
±3.65% Annual Total Visitation Estimate confidence limit

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

NSW residents contributed over 87% of NSW NPWS visits to the overall estimate in 2016, so as can be seen in table 6.2.6-1, 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 regardless of confidence level because the proportion of visitation from these regions is so low.

Table 6.2.6-1: Confidence Limits by Survey Region of Origin

<table>
<thead>
<tr>
<th>Number of PWG Park Visits</th>
<th>Sydney</th>
<th>Remainder NSW</th>
<th>ACT</th>
<th>Melbourne</th>
<th>Remainder VIC</th>
<th>Brisbane</th>
<th>Remainder SE QLD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adult Visits Confidence Limit</td>
<td>±3.31%</td>
<td>±5.22%</td>
<td>±14.52%</td>
<td>±10.76%</td>
<td>±18.39%</td>
<td>±9.02%</td>
<td>±12.11%</td>
</tr>
<tr>
<td>Child Visits Confidence Limit</td>
<td>±9.12%</td>
<td>±12.68%</td>
<td>±31.94%</td>
<td>±30.15%</td>
<td>±41.22%</td>
<td>±27.15%</td>
<td>±52.01%</td>
</tr>
<tr>
<td>Total Visits Confidence Limit</td>
<td>±4.28%</td>
<td>±6.53%</td>
<td>±18.03%</td>
<td>±15.47%</td>
<td>±22.75%</td>
<td>±11.39%</td>
<td>±29.22%</td>
</tr>
</tbody>
</table>

1. 95% confidence level.
2. Confidence limits of Australian regions not surveyed in 2016 (i.e. SA, WA, Tasmania, NT and remainder SE QLD) will be the same as the combined limit for Melbourne and remainder VIC (9.68% adult visits; 24.34% child visits; 13.06% total visits), as their estimation of NSW NPWS park visitation was based on the Victorian estimate.
3. The confidence limits for the seven survey regions as a whole in 2016 are ±2.72% adult visits; ±7.04% child visits; and ±3.49% total visits.
4. The confidence limits for the overall visitation estimate in 2016, including non-survey regions are: ±2.83% adult visits; ±7.34% child visits; and ±3.65% total visits;

The confidence limits for overall visitation per survey wave in 2016 range between ±8.20% (wave 4: 29 February-4 April) and ±15.99% (wave 13: 7 November-12 December) (see Table 6.2.6-2 following).

Table 6.2.6-2: Confidence Limits by Survey Wave

<table>
<thead>
<tr>
<th>No. PWG Park Visits</th>
<th>Adult Visits Confidence Limit</th>
<th>Child Visits Confidence Limit</th>
<th>Total Visits Confidence Limit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wave 1</td>
<td>±8.02%</td>
<td>±19.75%</td>
<td>±16.81%</td>
</tr>
<tr>
<td>Wave 2</td>
<td>±8.94%</td>
<td>±19.85%</td>
<td>±11.00%</td>
</tr>
<tr>
<td>Wave 3</td>
<td>±8.76%</td>
<td>±30.03%</td>
<td>±10.45%</td>
</tr>
<tr>
<td>Wave 4</td>
<td>±6.11%</td>
<td>±16.47%</td>
<td>±11.45%</td>
</tr>
<tr>
<td>Wave 5</td>
<td>±7.80%</td>
<td>±19.64%</td>
<td>±8.20%</td>
</tr>
<tr>
<td>Wave 6</td>
<td>±9.50%</td>
<td>±20.22%</td>
<td>±9.68%</td>
</tr>
<tr>
<td>Wave 7</td>
<td>±8.92%</td>
<td>±16.08%</td>
<td>±11.10%</td>
</tr>
<tr>
<td>Wave 8</td>
<td>±10.77%</td>
<td>±27.53%</td>
<td>±10.37%</td>
</tr>
<tr>
<td>Wave 9</td>
<td>±10.71%</td>
<td>±34.95%</td>
<td>±14.45%</td>
</tr>
<tr>
<td>Wave 10</td>
<td>±9.82%</td>
<td>±23.76%</td>
<td>±14.64%</td>
</tr>
<tr>
<td>Wave 11</td>
<td>±7.86%</td>
<td>±25.48%</td>
<td>±11.99%</td>
</tr>
<tr>
<td>Wave 12</td>
<td>±9.57%</td>
<td>±22.89%</td>
<td>±12.63%</td>
</tr>
<tr>
<td>Wave 13</td>
<td>±12.33%</td>
<td>±32.30%</td>
<td>±11.45%</td>
</tr>
<tr>
<td>Total 2016</td>
<td>±2.72%</td>
<td>±7.04%</td>
<td>±15.99%</td>
</tr>
</tbody>
</table>

±2.72% Adult Visitation Estimate confidence limit
±7.04% Child Visitation Estimate confidence limit
±3.49% Total Visitation Estimate confidence limit
1. 95% confidence level for surveyed region estimates only (excludes non-surveyed region estimates).

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

6.3 Visitation to Selected NSW NPWS Parks

Please note that visitation results by NSW NPWS Park are subject to significant error and so any comparison of visitation between survey years should be treated with substantial caution. Results have been presented graphically in Figures 6.3.3-1 and 6.3.3-2 to provide an indication of actual park visitation over time.

Blue Mountains National Park (5.2m visits) has maintained the top position in terms of the highest number of visits, in 2016 followed by Royal National Park (4.6m visits). From 2008 to 2010, visitation to Blue Mountains National Park was in decline (from 3.6m visits to 3.1m), but it has since broken visitation records in 2014 and 2016. Visit numbers to Royal National Park tend to be cyclical, as it achieved higher levels of visitation in 2008, 2012 and 2014 and lower levels of visitation in 2010 and 2012. From 2014 to 2016 visits increased by almost 1.4 m visits to reach 4.6m visits overall.

From 2008 to 2012 visitation to Ku-rung-gai Chase National Park steadily increased, but in 2014 visitation declined again to 2010 levels. However in 2016, record levels of visitation were recorded (3.3m). From 2008 to 2012 visitation to Lane Cove and Sydney Harbour National Parks had been declining. However, in 2014 visitation to both parks broke visitation records which have been broken again in 2016 (2.4m and 2.3m visits in 2016 respectively).

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 visits increased by almost 0.75m on 2014 levels to hit 2.2m visits.

These 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 captured who visited each of these six parks each year is statistically robust (ranging from n=50 up to n=216), while the number of respondents visiting each of the four remaining Top Ten parks each year are not statistically robust (i.e. under n=30 respondents). Therefore, estimated visitation numbers for parks with fewer than 30 respondents should be treated with substantial caution and regarded as indicative only,
rather than precise. Visitation estimates for these parks will vary markedly from year to year due to these small sample sizes.

In 2016, the following four parks placed seventh to tenth in terms of total visits Brisbane Water (1.4m), Crowdy Bay (1.3m), Bouddi (1.2m) and Glenrock National Parks (1.1m).

**Figure 6.3.3-1: Annual Visitation for Selected Parks – Parks 1-10**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue Mountains</td>
<td>1,113,616</td>
<td>1,151,128</td>
<td>1,309,371</td>
<td>1,422,831</td>
<td>1,449,365</td>
</tr>
<tr>
<td>Royal</td>
<td>2,196,525</td>
<td>2,258,118</td>
<td>2,353,092</td>
<td>3,324,431</td>
<td>3,454,470</td>
</tr>
<tr>
<td>Ku-ring-gai Chase</td>
<td>3,324,431</td>
<td>4,600,578</td>
<td>5,195,737</td>
<td>6,270,769</td>
<td>6,469,232</td>
</tr>
<tr>
<td>Lane Cove</td>
<td>2,258,118</td>
<td>2,353,092</td>
<td>2,446,262</td>
<td>3,324,431</td>
<td>3,324,431</td>
</tr>
<tr>
<td>Sydney Harbour</td>
<td>2,353,092</td>
<td>2,446,262</td>
<td>2,551,300</td>
<td>3,555,034</td>
<td>3,620,798</td>
</tr>
<tr>
<td>Kosciuszko</td>
<td>2,446,262</td>
<td>2,551,300</td>
<td>2,708,042</td>
<td>3,620,798</td>
<td>4,049,520</td>
</tr>
<tr>
<td>Brisbane Water</td>
<td>2,551,300</td>
<td>2,708,042</td>
<td>3,088,042</td>
<td>4,049,520</td>
<td>4,600,578</td>
</tr>
<tr>
<td>Crowdy Bay</td>
<td>2,708,042</td>
<td>3,088,042</td>
<td>3,324,431</td>
<td>4,600,578</td>
<td>5,195,737</td>
</tr>
<tr>
<td>Bouddi</td>
<td>2,708,042</td>
<td>3,088,042</td>
<td>3,324,431</td>
<td>4,600,578</td>
<td>5,195,737</td>
</tr>
<tr>
<td>Glenrock</td>
<td>3,088,042</td>
<td>3,324,431</td>
<td>3,620,798</td>
<td>4,600,578</td>
<td>5,195,737</td>
</tr>
</tbody>
</table>

Caution – small samples sizes for Brisbane Water, Crowdy Bay, Bouddi and Glenrock (n<30).

For parks ranked 11 to 20, visits estimates should be used with extreme caution due to very small samples sizes. As can be seen in Figure 6.3.3-2 visitation estimates for each of the parks ranked 11 to 20 in 2016 was the highest ever recorded, with the exception of visits to Botany Bay National Park.

As discussed small numbers of respondents will have significant impacts on annual visitation estimates to specific parks. One such example in Figure 6.3.3-2 is Bundjalung National Park wherein visitation is estimated to have increased from approximately 147,352 visits in 2012 to 702,875 in 2014 and up to 878,309 in 2016. This is heavily influenced by an increase from 13 respondents in 2012 to 22 respondents in 2014 and...
down to 17 respondents in 2016. At this level results should be interpreted as indicative of significant increases or declines rather than absolutes.

Visitation trends to *Murray Valley National Park*, are interesting to note. The park was first measured in 2014. In 2014 almost half of all visits to this park came from people living in regional NSW (48.9%) and 22% came from people living in regional Victoria. These are regions in close proximity to this park, which is on the NSW-Victorian border. In 2016 almost half of all visits were from people living in Melbourne (49.2%) with 26% coming from regional Victoria and only 13.3% from regional NSW. It would appear that the proximity of the park to people living in Victoria had a strong influence on visitation to this park in 2016. *Tomaree, Bundjalung, Eurobodalla, Garigal, Yuraygir and Botany Bay* National Parks tend to be regularly listed in the top 20 visited parks, while *Arakwal and Conjola* National Parks are newcomers in 2016. If current trends hold Parramatta *River Regional Park* and *Murray Valley National Park* appear to be parks that will be regularly listed in the top 20 parks.

![Figure 6.3.3-2: Annual Visitation for Selected Parks – Parks 11-20](image)

Caution – small samples sizes for all parks (n<30).
7. POTENTIAL FACTORS INFLUENCING NSW NPWS PARK VISITS

This section investigates whether changes in NSW NPWS visitation trends are influenced by external factors and specifically explores the following:

- Overall visitation trends to and with NSW – specifically overnight visitors, visitor nights and day trips;
- Visitation to overseas destinations – specifically domestic visits to overseas destinations and exchange rates;
- Economic Impacts – specifically interest rates and fuel prices; and
- Weather Impacts – specifically temperature, rainfall and specific weather events.

Please note that for some of the following analysis, 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 match monthly and quarterly data obtained from other sources. 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 - 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.

7.1 Visitation to New South Wales

Figure 7.1.1 shows annual survey visitation data for survey years 2008 to 2016 (adjusted as detailed above) and compares it with the number of visitors taking overnight trips to destinations in New South Wales14. Overnight visitation has been divided into interstate visitors and intrastate visitors. Results show that overnight visitation levels did fall from 2008 to 2010, but rebounded in 2012 (exceeding 2008 levels) and increased again in 2014 and 2016. This result was consistent across both interstate and intrastate visitors. However, NSW NPWS park visitation data, whilst showing a rebound from 2010 levels in 2012, did not exceed 2008 levels, but did increase to its highest level in 2014 and then again in 2016. This result is illustrated in figure 7.1.2, which compares NSW NPWS park visitation data with visitor nights in NSW.

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14 National Visitor Survey – Tourism Research Australia.
Figure 7.1.1: Annual NSW NPWS Park Visitation and Overnight Visitors to NSW

Source: National Visitor Survey – Tourism Research Australia

Figure 7.1.2: Annual NSW NPWS Park Visitation and Visitors Nights in NSW

Source: National Visitor Survey – Tourism Research Australia

An argument can be made and recently added PVS questions tend to confirm (see section 8.4 for more details) that the majority of visits to NSW NPWS parks would be for day trips so NSW NPWS park visitation trends should align more closely with overall day trip...
visitation trends in NSW. Figure 7.1.3 compares annual NSW NPWS park visitation with day trip visitation to NSW. As can be seen, the number of day trip visitors has been steadily increasing over time from 44.3m visits in 2008 to 54.9m visits in 2012. It declined in 2014 (51.0m) and then increased again in 2016 (57.7m). In contrast the number of NSW NPWS park visits declined in 2010 and then increased in 2012 (but not to 2008 levels) and then increased to record levels in 2014 and 2016. So the trends displayed for overall day trip visitors in NSW is not generally evident in NSW NPWS park visits. Some explanation for this may be the fact that day trip definitions used for tourism surveys such as the National Visitors Survey would exclude a lot of the “day trips” made to NSW NPWS parks because of distance travelled requirements.

Figure 7.1.3: Annual NSW NPWS Park Visitation versus Day Visitors in NSW

![Graph showing annual NSW NPWS park visits and total day visitors in NSW over years 2008 to 2016](image)

Source: National Visitor Survey – Tourism Research Australia

However 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 NSW NPWS parks may provide a clearer indication of whether overall day trip trends align with trends for single park visits or not.
Figure 7.1.4 shows that the proportion of single trips to NSW NPWS parks increased over time from 53.3% of visits in 2008 to 58.1% of visits in 2012. It declined to 56.6% in 2014 and then increased again to 57.6% in 2016. Whilst the trend in the proportion of single park visits is not perfectly aligned with the trend in day visitors, the general pattern of single park visits does follow a similar trend to the overall number of day trip visitors to NSW. This would tend to indicate that there may be a relationship between overall day visitor numbers and single visits to NSW NPWS parks.

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**Figure 7.1.4: Single Visits to NSW NPWS Parks versus Day Visitors in NSW**

![Graph showing single visits to NSW NPWS parks versus day visitors in NSW.](image)

Source: National Visitor Survey – Tourism Research Australia

The trend in single visits to NSW NPWS parks (which aligns with day visitors to NSW) and the overall trend in NSW NPWS parks visits (which does not tend to align with trend in overnight visitation to NSW), indicates that multiple visits by individuals to NSW NPWS parks must not have been as strong in 2012 as in previous years, but should have rebounded in 2014 and 2016.

In fact, as shown in figure 7.1.5, there was a downward trend in adults visiting NSW NPWS parks 2 times from 2008 to 2014 which rebounded in 2016. There was also a downward trend for adults visiting 4 times and 5 or more times from 2008 to 2012 with slight increases evident in 2014 followed by another decline in 2016. Only those adults visiting NSW NPWS parks...
parks 3 times tended to exhibit a slight upward trend from 2010 to 2014, but again a decline was evident in 2016.

On average these trends led to a decline in the number of adult visits made from 2008 to 2012. 2.95 visits in 2008 to 2.67 visits in 2012, with an increase in 2014 to 2.87, but another decline in 2016 to 2.61.

![Figure 7.1.5: Number of Times Visiting a NSW NPWS Park (Last 4 Weeks) – Adult Visits](image)

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\(^{15}\). Figure 7.1.6 shows that the proxy for NSW 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 and 2016 numbers being the highest so far recorded.

On this basis NSW NPWS park visitor’s trends can be seen to broadly align with trends in overall visitors to NSW.

\(^{15}\) Total visitors to NSW 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.
The downward trend in the average number of adult visits to NSW NPWS parks from 2008 to 2012 combined with the upward trend in the proportion of single adult visits over the same period means that there has been a decline in the proportion of multiple visits to NSW NPWS parks. Figure 7.1.7 shows that in 2008 less than half of adult visits were multiple visits (47%) and this declined to 42% in 2012. There was a minor increase in the proportion of multiple visits in 2014 (43%), but it returned to 42% in 2016.

The decline in multiple visits to NSW NPWS parks from 2008 to 2012 appears to have been primarily driven by people aged 25-34 years – Generation Y’s, with the proportion of 25-34 year olds declining significantly from 49% in 2008 to 34% in 2012. There has been some recovery in multiple visits amongst this age group in 2014, which was maintained in 2016. Increases in multiple visits for 34-49 year olds and those age 50 years and over occurred in 2014, but there was a marked decline in multiple visits from 35-49 year olds in 2016. This decline was not as prominent amongst those aged 50 years and over.

A major concern in 2014 was the fall in the proportion of 18-24 year olds undertaking multiple visits in 2014, but this returned to levels experienced earlier by 2016.
Figure 7.1.7: Multiple Visits$^1$ (Last 4 Weeks) to NSW NPWS Parks – By Age

The decline in multiple visits from 2008 to 2012 can be attributed to both male and female Generation Y’s, as multiple visitation for males aged 25-34 years fell from 52% in 2008 to 39% in 2012, while multiple visitation for females aged 25-34 also fell from 44% in 2008 to 27% in 2012 (see Figure 7.1.8). Proportional contributions for both of these groups increased slightly in 2014 and multiple visits from females increased to 39% in 2016. However, Proportions of multiple visits from males aged 25-34 however, declined to their lowest levels ever in 2016 (37%), significantly lower than the 2008 proportion for this group. Potential for an overall increase in multiple visits from Generation Y’s in 2016 was undermined by low levels of male Generation Y multiple visitation.

The increase in the proportion of multiple visits from males aged 18-24 noted in the years from 2008 to 2012 reduced in 2014 and the proportion of females aged 18-24 fell to the lowest levels recorded in 2014. In 2012 it looked like Generation Z may help revive NSW NPWS park visitation however, 2014 results indicated otherwise. However, increases in multiple visits by both male and female Generation Z’s in 2016 have reignited this potential.

Declines in multiple visits from both males and females aged 35-49 may be explained to some extent by Generation Y’s shifting into this age category.

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$^1$ Two or more NSW NPWS park visits
7.2 Visitation to Overseas Destinations

Another reason why levels of NSW NPWS park visits may vary from year to year is that exchange rates may make it more or less cost competitive to visit overseas destinations at the expense of domestic destinations. Figure 7.2.1 shows that the numbers of Australians visiting overseas has increased from approximately 5.25m in 2008 to approximately 8.8m in 2016 – a growth of over 68% in 8 years, while NSW NPWS park visits have increased by almost 38% over the same period.

Figure 7.2.2 compares monthly NSW NPWS park visitation with exchange rates (using the Trade Weighted Index divergence from the 8 year average). It can be observed that as exchange rates have increased over the period monthly NSW NPWS park visitation has generally tended to be lower than 2008 figures. In 2008, exchange rates were low, making it relatively more expensive to take an overseas trip than 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, exchange rates were low making it relatively more expensive to take an overseas trip. So increase volume of overseas visits may provide some inhibitive impact on domestic NSW NPWS park visits as the amount of leisure time available to most potential visitors is not infinite.
In 2012, overall NSW NPWS park visits increased from 2010 levels, but this was not until the end of 2012, so for the bulk of 2012 NSW NPWS park visits were also relatively low. Similarly in 2014, NSW NPWS Park visits increased, but this was mainly during the summer to autumn months of 2014 and again visits declined. In early 2016 NSW NPWS visits were high, when exchange rates were at their least competitive for overseas travel. In fact, it appears there is a peak in domestic visits in the summer months of each year, when individuals and families are generally on extended holidays, while there are declines in domestic visitation during winter (the most likely time when residents will travel overseas i.e. the northern summer).

A strong Australian dollar may encourage some Australians to visit overseas at the expense of domestic trips – manifested in a reduction in the total number of domestics trips undertaken or a reduction in lengths of stay. Based on overall overnight visitation data we know that the total number of visitor nights to NSW has increased by 17.2% from 2008 to 2016 and the number of overnight visitors to NSW increased by 21.7% over the same period. This means that on average, overnight visitors are staying for shorter periods on overnight visits – i.e. length of stay for any one visit is decreasing. As we also know that average number of NSW NPWS park visits has been in decline from 2.95 in 2008 to 2.61 in 2016, it can also be inferred that a strong Australian dollar is having the same effect on park visitation as it is having on overnight visitation to NSW namely the number of visitors is...
increasing, but their length of stay (i.e. number of nights) is decreasing but this assumption is difficult to prove.
Figure 7.2.2: Monthly NSW NPWS Park Visitation versus Trade Weighted Index

More likely to consider an international trip over a domestic trip

More likely to consider a domestic trip over an international trip

1. 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)
7.3 Economic Impacts

Economic factors may also play a role in impacting visitation rates to NSW NPWS parks. Lower interest rates may provide more disposable income to travel, as less money needs to be spent on mortgage repayments and increase overall consumer confidence. Similarly, the lower the price of fuel the cheaper it is to travel, so domestic travel can become more appealing.

Figure 7.3.1 compares monthly NSW NPWS park visitation trends with monthly interest rates. For the first nine months of 2008 interest rates were high (7.00%-7.25%), yet NSW 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 also coincided with lower levels of NSW NPWS park visitation. For much of 2011 interest rates remained at 4.75%. However, from November 2011 interest rates began to fall, so that by the end of 2012 interest rates were at 3.00%. By September 2013 interest rates fell to 2.5% and remained there for all of 2014. At the start of 2016 interest rates were at 2.0% and have now declined to 1.5%. Over this period NSW NPWS park visitation was low in 2012, with peaks in visitation only occurring in early 2013. In 2014 NSW NPWS park visitation was high until mid-year and then declined, while for all of 2016 visitation has been high.

Such 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. However, the high interest rates present in 2008 do not tend to explain the high levels of NSW NPWS park visitation in 2008. Again in early 2014 and for all of 2016 NSW NPWS park visits were high, but interest rates were low, as would be expected. However, park visits were low in the second half for 2014, while interest rates remained low. From this analysis it would appear that park visitation is not strongly linked with interest rates.

Figure 7.3.2 charts changes in monthly Sydney fuel prices compared with the average fuel price for the 6 year survey period. As can be seen, fuel prices were higher than average in 2008, yet NSW NPWS park visitation was high. In 2010, fuel prices were lower than the average, yet NSW NPWS park visitation was low. From 2011 to 2014, fuel prices have been above the average, yet NSW NPWS park visitation tended to increase in 2012 and 2014. In 2016 fuel prices were low, yet NSW NPWS park visitation was high.

Until 2016, the fuel price to park visitation relationship ran counter-intuitive to what would be expected i.e. the lower the fuel price, the more likely one is to travel and the more likely one would be to travel to a NSW NPWS park. Based on this information it would appear that a relationship between fuel prices and NSW NPWS park visitation is weak or not likely
to exist. This may partially be explained by the high incidence of lower distance day trip based visits to parks in the Sydney metro area or that fuel costs are not a major consideration when it comes to determining recreation plans.
Figure 7.3.1: Monthly NSW NPWS Park Visitation versus Interest Rates

1. Source: Reserve Bank of Australia – Cash Rate.
Figure 7.3.2: Monthly NSW NPWS Park Visitation versus Sydney Fuel Prices

1. Source: Australian Automobile Association – Sydney Unleaded Fuel Prices (cents per litre).

1. Source: Australian Automobile Association – Sydney Unleaded Fuel Prices (cents per litre).
7.4 Weather Effects

Analysis undertaken in 2010 tended to indicate that NSW NPWS park visitation was influenced by weather, particularly significant weather events. This section explores three weather variables and their impact on park visitation namely temperature, rainfall and significant and sustained weather events. All weather data provided in this section is sourced from the Bureau of Meteorology’s (BoM) Climate Data Online service.

7.4.1 Temperature Effects on NSW NPWS Park Visitation

Figure 7.4.1-1 compares monthly NSW NPWS park visitation to monthly maximum daytime temperatures presented in terms of divergence from the average\(^1\). From 2008 to 2012 there appears to be a relationship between NSW NPWS park visitation and temperature – the higher the temperature above the average, the greater the number of park visits. The 2014 result differed from other years in that, as temperature increased above the average, park visitation decreased. However, results in 2016 reinforced the original 2008 to 2012 trend. In addition, peaks in visitation tended to correspond with peaks in favourable temperature.

\(^1\) Divergence from the average is calculated using 14 weather stations across the state, representing each NSW NPWS Region. Average is based on the BoM average for each weather station.
Figure 7.4.1-1: Monthly NSW NPWS Park Visitation versus Monthly Temperatures

1. Linear trend lines have been fitted to assist with description of findings.
7.4.2 Rainfall Effects on NSW NPWS Park Visitation

Figure 7.4.2-1 compares monthly NSW NPWS park visitation with monthly rainfall represented as a divergence from the average. From 2008 to 2014 there appears to have been an expected relationship between visitation and rainfall i.e. the more rainfall is above the average, the fewer visits. This trend is particularly evident in 2008 and 2010, but is not as strong in 2012 and 2014. In 2016 there is a weak opposite trend i.e. the more rainfall is above the average, the more visits there are.

However, when we examine weather trends in more detail for the most part, 2016 was dry, with high rainfall only experienced in 3 months (January, June and September). These rainfall events may have skewed averages thereby influencing the overall rainfall-visitation relationship. Across each year examined peaks in visitation generally tend to correspond with troughs in rainfall. Rainfall is also more likely to significantly impact visitation if it is raining at both the origin of the visitor, as well as at the visitor's intended destination. To this extent it is more likely to be a significant variable at the regional level. This is likely to have been the case in 2016.

---

1 Divergence from the average is calculated using 14 weather stations across the state, representing each NSW NPWS Region. Average is based on the BoM average for each weather station.
Figure 7.4.2-1: Monthly NSW NPWS Park Visitation versus Monthly Rainfall

1. Linear trend lines have been fitted to assist with description of findings. Formal trend analysis will be undertaken at the end of the 2016 survey.
7.4.3 Significant and Sustained Weather Event Effects on NSW NPWS Park Visitation

Table 7.4.3-1 provides a weather summary from the Bureau of Meteorology for each survey year. These brief descriptions of the year’s weather tend to reinforce the findings of trend analysis for temperature and rainfall. Generally it can be observed that warm, dry weather results in higher levels of park visitation, while cool, wet weather results in lower levels of park visitation. This is not to be unexpected when national parks essentially provide and outdoor experience.

Table 7.4.3-1: Weather Summary for NSW and Associated NSW NPWS Park Visits

<table>
<thead>
<tr>
<th>Year</th>
<th>Weather Summary</th>
<th>PWG Annual Park Visitation</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>Dry year with a drought continuing in southern NSW</td>
<td>High levels of visitation</td>
</tr>
<tr>
<td>2010</td>
<td>Third wettest year on record – wettest since 1956</td>
<td>Low levels of visitation</td>
</tr>
<tr>
<td>2012</td>
<td>Cool wet start with warm, dry finish</td>
<td>Low visitation until summer 2012-13</td>
</tr>
<tr>
<td>2014</td>
<td>Warmest year on record, driest year since 2006</td>
<td>High visitation until winter 2014</td>
</tr>
<tr>
<td>2016</td>
<td>Warm in Summer and Autumn and generally warm in Winter and Spring, with high rainfall in June and September</td>
<td>High visitation generally across entire year</td>
</tr>
</tbody>
</table>

Table 7.4.3-2 and Figure 7.4.3 show monthly NSW NPWS park visitation and compares it with quarterly weather summaries for NSW. Key findings are discussed below. Seasons wherein visitation did not match what would be expected, given temperature, rainfall and specific weather events are highlighted in red in Figure 7.4.3.

2010 could have been a worse year for NSW NPWS park visitation based on weather conditions. Similarly, weather conditions in 2012 should typically 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 characterised by lower levels of park visitation than 2010.

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 so visitation in both these seasons should have higher. Overall 2014 annual park visitation levels should have been even higher if visitation in winter and spring was at levels typically experienced during favourable weather periods.

In 2016 apart from three wet months (January, June and September) the year was warm, even in winter. This provided ideal weather conditions for promoting NSW NPWS park visitation in 2016 and the relationship held as visitation in 2016 was the highest so far recorded.
Table 7.4.3-2: Seasonal Weather Summary NSW and Associated NSW NPWS Park Visits

<table>
<thead>
<tr>
<th>Season</th>
<th>Weather Summary</th>
<th>Visitation</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Autumn 2008</td>
<td>Dry, below average rainfall</td>
<td>High</td>
<td>Favourable conditions for high visits</td>
</tr>
<tr>
<td>Winter 2008</td>
<td>Average weather, not very cold or very warm</td>
<td>Moderate</td>
<td>Conditions typical for moderate visitation</td>
</tr>
<tr>
<td>Spring 2008</td>
<td>Warm, but with above average rainfall</td>
<td>High</td>
<td>Mostly favourable conditions for high visits</td>
</tr>
<tr>
<td>Summer 2008-09</td>
<td>Above average temperatures, Cyclones causing high rainfall</td>
<td>Moderate</td>
<td>Higher summer temperatures may have kept visits down</td>
</tr>
<tr>
<td>Summer 2009-10</td>
<td>Wet, warm, cyclones causing high rainfall</td>
<td>Moderate</td>
<td>Visitation higher than expected for conditions</td>
</tr>
<tr>
<td>Autumn 2010</td>
<td>Wet, above average temperatures, some flooding</td>
<td>Low</td>
<td>Mostly unfavourable conditions - low visits expected</td>
</tr>
<tr>
<td>Winter 2010</td>
<td>Cold, wet winter</td>
<td>Moderate-Low</td>
<td>Unfavourable conditions - visits slightly higher than expected</td>
</tr>
<tr>
<td>Spring 2010</td>
<td>Wettest spring on record, cool</td>
<td>Low</td>
<td>Unfavourable conditions - low visits expected</td>
</tr>
<tr>
<td>Autumn 2012</td>
<td>Wettest week in March, cold, but dry autumn</td>
<td>Low-Moderate</td>
<td>Visits expected to be low in March (and were) - remainder similar to autumn 2010</td>
</tr>
<tr>
<td>Winter 2012</td>
<td>Dry, clear winter - warm days, cool nights</td>
<td>Low</td>
<td>Favourable conditions - visits should have been much higher</td>
</tr>
<tr>
<td>Spring 2012</td>
<td>Warm, dry spring</td>
<td>Low</td>
<td>Favourable conditions - visits should have been much higher</td>
</tr>
<tr>
<td>Summer 2012-13</td>
<td>Warm summer - flooding in the north of NSW in late January</td>
<td>High</td>
<td>Mostly favourable conditions to mid summer - high visits until mid-summer</td>
</tr>
<tr>
<td>Summer 2013-14</td>
<td>Driest summer since 1984-5, 5th warmest</td>
<td>High</td>
<td>High visits in early summer, but declined with increasing temperatures late summer</td>
</tr>
<tr>
<td>Autumn 2014</td>
<td>Wet &amp; cloudy March, but drier &amp; warmer from mid-April with record warm spell in May</td>
<td>High</td>
<td>Generally favourable conditions for high visits</td>
</tr>
<tr>
<td>Winter 2014</td>
<td>Average winter</td>
<td>Moderate-Low</td>
<td>Favourable conditions - visits should have been higher</td>
</tr>
<tr>
<td>Spring 2014</td>
<td>Warmest spring on record</td>
<td>Moderate-High</td>
<td>Favourable conditions - but visits could have been slightly higher over the period</td>
</tr>
<tr>
<td>Summer 2015-16</td>
<td>Stormy summer, but dry for the most part</td>
<td>High</td>
<td>Generally favourable conditions for high visits</td>
</tr>
<tr>
<td>Autumn 2016</td>
<td>Warmest autumn on record</td>
<td>High</td>
<td>Favourable conditions for high visits</td>
</tr>
<tr>
<td>Winter 2016</td>
<td>Mild winter, with warmest nights on record, but third wettest on record</td>
<td>Moderate-High</td>
<td>Unfavourable for June visits, but favourable for high visits in July and August</td>
</tr>
<tr>
<td>Spring 2016</td>
<td>Cool, wet September, but dry October and November. Warm on coast, but cool inland</td>
<td>Moderate-High</td>
<td>Unfavourable for September visits, but favourable for high visits in October and November</td>
</tr>
</tbody>
</table>
Figure 7.4.3: Monthly NSW NPWS Park Visitation with Associated Weather Events

1. Source: Bureau of Meteorology – Annual and Quarterly weather summaries.
8. OTHER SURVEY RESULTS

Please note that statistically significant year on year changes in results are highlighted in blue (higher) or orange (lower).

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

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

Table 8.1-1: Age and Sex by Region - All Respondents 2016

<table>
<thead>
<tr>
<th>Age by Sex by Region</th>
<th>Total Pop'n</th>
<th>18-24 Male</th>
<th>25-34 Male</th>
<th>35-49 Male</th>
<th>50+ Male</th>
<th>18-24 Female</th>
<th>25-34 Female</th>
<th>35-49 Female</th>
<th>50+ Female</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n= 15,656</td>
<td>n= 864</td>
<td>n= 1,064</td>
<td>n= 2,193</td>
<td>n= 3,324</td>
<td>n= 783</td>
<td>n= 1,213</td>
<td>n= 2,413</td>
<td>n= 3,802</td>
</tr>
<tr>
<td>Sydney</td>
<td>uc 3,259</td>
<td>215</td>
<td>304</td>
<td>423</td>
<td>655</td>
<td>191</td>
<td>305</td>
<td>453</td>
<td>713</td>
</tr>
<tr>
<td></td>
<td>uc% 21%</td>
<td>24%</td>
<td>23%</td>
<td>21%</td>
<td>19%</td>
<td>24%</td>
<td>24%</td>
<td>21%</td>
<td>19%</td>
</tr>
<tr>
<td></td>
<td>wc% 28%</td>
<td>28%</td>
<td>31%</td>
<td>29%</td>
<td>26%</td>
<td>28%</td>
<td>31%</td>
<td>29%</td>
<td>26%</td>
</tr>
<tr>
<td>Remainder NSW</td>
<td>uc 2,608</td>
<td>127</td>
<td>166</td>
<td>307</td>
<td>692</td>
<td>107</td>
<td>171</td>
<td>313</td>
<td>725</td>
</tr>
<tr>
<td></td>
<td>uc% 17%</td>
<td>14%</td>
<td>13%</td>
<td>15%</td>
<td>20%</td>
<td>13%</td>
<td>13%</td>
<td>15%</td>
<td>19%</td>
</tr>
<tr>
<td></td>
<td>wc% 15%</td>
<td>14%</td>
<td>11%</td>
<td>14%</td>
<td>19%</td>
<td>14%</td>
<td>11%</td>
<td>14%</td>
<td>18%</td>
</tr>
<tr>
<td>ACT</td>
<td>uc 1,960</td>
<td>88</td>
<td>151</td>
<td>305</td>
<td>417</td>
<td>97</td>
<td>152</td>
<td>310</td>
<td>440</td>
</tr>
<tr>
<td></td>
<td>uc% 12%</td>
<td>10%</td>
<td>12%</td>
<td>15%</td>
<td>12%</td>
<td>12%</td>
<td>12%</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td></td>
<td>wc% 2%</td>
<td>2%</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Melbourne</td>
<td>uc 2,612</td>
<td>159</td>
<td>290</td>
<td>361</td>
<td>512</td>
<td>147</td>
<td>240</td>
<td>338</td>
<td>565</td>
</tr>
<tr>
<td></td>
<td>uc% 17%</td>
<td>18%</td>
<td>22%</td>
<td>18%</td>
<td>15%</td>
<td>18%</td>
<td>19%</td>
<td>16%</td>
<td>15%</td>
</tr>
<tr>
<td></td>
<td>wc% 26%</td>
<td>27%</td>
<td>29%</td>
<td>27%</td>
<td>23%</td>
<td>27%</td>
<td>29%</td>
<td>27%</td>
<td>24%</td>
</tr>
<tr>
<td>Remainder VIC</td>
<td>uc 1,307</td>
<td>62</td>
<td>83</td>
<td>157</td>
<td>347</td>
<td>47</td>
<td>82</td>
<td>166</td>
<td>363</td>
</tr>
<tr>
<td></td>
<td>uc% 8%</td>
<td>7%</td>
<td>6%</td>
<td>8%</td>
<td>10%</td>
<td>6%</td>
<td>6%</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td>wc% 8%</td>
<td>7%</td>
<td>6%</td>
<td>7%</td>
<td>10%</td>
<td>7%</td>
<td>6%</td>
<td>7%</td>
<td>10%</td>
</tr>
<tr>
<td>Brisbane</td>
<td>uc 1,977</td>
<td>124</td>
<td>184</td>
<td>238</td>
<td>407</td>
<td>124</td>
<td>174</td>
<td>279</td>
<td>447</td>
</tr>
<tr>
<td></td>
<td>uc% 13%</td>
<td>14%</td>
<td>14%</td>
<td>12%</td>
<td>12%</td>
<td>15%</td>
<td>14%</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td></td>
<td>wc% 13%</td>
<td>15%</td>
<td>13%</td>
<td>12%</td>
<td>15%</td>
<td>14%</td>
<td>13%</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td>Remainder Southern &amp; Southeast QLD</td>
<td>uc 1,960</td>
<td>109</td>
<td>127</td>
<td>265</td>
<td>440</td>
<td>91</td>
<td>164</td>
<td>280</td>
<td>484</td>
</tr>
<tr>
<td></td>
<td>uc% 12%</td>
<td>12%</td>
<td>10%</td>
<td>13%</td>
<td>13%</td>
<td>11%</td>
<td>13%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td></td>
<td>wc% 8%</td>
<td>7%</td>
<td>7%</td>
<td>9%</td>
<td>7%</td>
<td>6%</td>
<td>8%</td>
<td>9%</td>
<td>9%</td>
</tr>
</tbody>
</table>

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);
w% - Weighted percentage (the proportion of the total 18yrs+ population of the seven survey regions that cell represents in each column).
As the sampling frame changed in 2012 from being based on the Electronic White Pages to Random Digit Dialling of both landline and mobile numbers, data was also weighted to reflect the telephone status of respondents. In 2012 and 2014, 22%-23% of calls were made to mobile numbers. To increase the representation of mobile only households in the sample in 2016 53% percent of respondents were called on mobile numbers.

People from mobile only households represented 26% the population in 2016 and 22% of this segment were found in the survey sample in 2016. This represents a substantial increase from 2012 and 2014 levels (7% and 9% respectively). Therefore, in order to reflect their population contribution respondents from mobile only households were given smaller weights in 2016 than in previous years. Overall this means that the sample was more representative of phone status in 2016 than in previous years. People from households with both mobiles and landlines were weighted down slightly, as they were slightly over-represented in the sample (74% in the sample c.f. 70% in the population in 2014). Note that higher weights for mobile only households in the ACT and Queensland were employed, because fewer calls were made to mobiles in these regions (even though they were over-sampled).

Table 8.1-2: Phone Status by region - All respondents 2012 to 2016

<table>
<thead>
<tr>
<th>Phone Status by Region</th>
<th>Mobiles &amp; Landlines in the Household</th>
<th>Mobiles Only in the Household</th>
<th>Landlines Only in the Household</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2012 n=13,282</td>
<td>2014 n=13,120</td>
<td>2016 n=11,600</td>
</tr>
<tr>
<td>uh%</td>
<td>85%</td>
<td>84%</td>
<td>74%</td>
</tr>
<tr>
<td>wh%</td>
<td>74%</td>
<td>69%</td>
<td>70%</td>
</tr>
</tbody>
</table>

Sydney

|                        | uc        | 2,756       | 2,724       | 2,358     | 275      | 350      | 822     | 227     | 175    |
| uh%                    | 85%        | 84%        | 72%    | 8%     | 11%    | 25%    | 7%     | 5%     | 2%    |
| wh%                    | 74%        | 71%        | 71%    | 19%    | 23%    | 26%    | 8%     | 7%     | 3%    |

Remainder NSW

|                        | uc        | 2,176       | 2,140       | 1,906     | 177      | 229      | 582     | 262     | 240    |
| uh%                    | 83%        | 82%        | 73%    | 7%     | 9%     | 22%    | 10%    | 9%     | 5%    |
| wh%                    | 71%        | 66%        | 69%    | 17%    | 24%    | 26%    | 12%    | 10%    | 6%    |

ACT

|                        | uc        | 1,767       | 1,804       | 1,655     | 34       | 47       | 222     | 155     | 117    |
| uh%                    | 90%        | 92%        | 84%    | 2%     | 2%     | 11%    | 8%     | 6%     | 4%    |
| wh%                    | 78%        | 78%        | 64%    | 15%    | 16%    | 33%    | 8%     | 6%     | 2%    |

Melbourne

|                        | uc        | 2,161       | 2,131       | 1,810     | 259      | 335      | 757     | 184     | 141    |
| uh%                    | 63%        | 62%        | 69%    | 10%    | 13%    | 29%    | 7%     | 5%     | 2%    |
| wh%                    | 75%        | 71%        | 72%    | 18%    | 24%    | 25%    | 7%     | 5%     | 3%    |

Remainder VIC

|                        | uc        | 1,085       | 1,022       | 956      | 89       | 189      | 308     | 129     | 96    |
| uh%                    | 83%        | 78%        | 73%    | 7%     | 14%    | 24%    | 10%    | 7%     | 3%    |
| wh%                    | 74%        | 67%        | 66%    | 16%    | 25%    | 22%    | 11%    | 8%     | 5%    |

Brisbane

|                        | uc        | 1,614       | 1,524       | 1,420     | 121      | 161      | 463     | 140     | 130    |
| uh%                    | 86%        | 84%        | 72%    | 6%     | 9%     | 23%    | 7%     | 7%     | 5%    |
| wh%                    | 72%        | 66%        | 66%    | 21%    | 28%    | 30%    | 7%     | 6%     | 4%    |

Remainder Southern QLD

|                        | uc        | 1,723       | 1,775       | 1,495     | 86       | 140      | 346     | 226     | 186    |
| uh%                    | 85%        | 84%        | 76%    | 4%     | 7%     | 18%    | 11%    | 9%     | 6%    |
| wh%                    | 76%        | 67%        | 69%    | 16%    | 26%    | 28%    | 8%     | 7%     | 4%    |

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 cell represents in each row).
8.2 Park Visitation by Selected Demographics

The following graphs compare the actual population makeup of the survey region, with the percentage of visitors and visits to any NSW NPWS-managed park by survey year.

Compared to the population, NSW NPWS park visitors are more likely to be male (Figure 8.2-1).

Figure 8.2-1: Visitors to NSW NPWS Parks by Sex

![Visitors to NSW NPWS Parks by Sex](image)

Visitation to NSW NPWS parks is slightly more over-represented by males than it is for visitors (Figure 8.2-2). Whist visitation by males increased to 60% in 2016 (and females decreased to 40%), the increase was not statistically significant in comparison with other years.
A slightly younger age profile in visitors was evident in both 2014 and 2016 compared with other years as the proportion of visitors aged 35-49 years was significantly lower than in previous years (Figure 8.2-3) and the proportion of visitors aged 18-28 years significantly higher. The proportion of visits made by 18-24 year olds in 2010, 2014 and 2016 are significantly higher than in 2008 (Figure 8.2.4).

**Figure 8.2-3: Visitors to NSW NPWS Parks by Age**
The increase in the proportion of 18-24 year old visitors in 2014 and 2016 is primarily due to the increase in male visitors age 18-24, whereas the fall in visitors aged 35-49 in 2014 and 2016 can be attributed to falls for both sexes in this age group (Figure 8.2-5). Higher levels of visitation from 18-24 year olds in 2014 and 2016 can be solely attributed to increased visitation by males aged 18-24 (Figure 8.2-6).

**Figure 8.2-5: Visitors to NSW NPWS Parks by Age by Sex**

![Chart showing visitation to NSW NPWS Parks by age and sex for years 2008 to 2016.](chart)

![Chart showing visitation to NSW NPWS Parks by age and sex for years 2008 to 2016.](chart2)
In 2016 the proportion of visitors employed in work increased, as did overall visitation (Figures 8.2-7 and 8.2-8) This was due to increases in visitors and visitation from people in full time employment, while visits and visitation from those in part-time employment declined. Both visits and visitation declined from the 2014 high in 2016 amongst those looking for work.
The proportion of people without any form of tertiary education who visit NSW NPWS parks is declining over time. The opposite trend is evident amongst people with some form of tertiary education (Figure 8.2-9). In terms of visitation, whilst there was a slight rebound in 2014 for those with no tertiary education, visitation fell to its lowest level for this group in 2016. (Figure 8.2-10). Conversely, visitation for those with tertiary education increased to the equal highest level in 2016 (equal with 2012 results).
Overall the proportion of NSW NPWS park visitors with 1, 2, 3 or 4 or more children in the household declined to its lowest level in 2014 and remained at this level in 2016 (Figure 8.2-11). The proportion of visitors from households with no children in the household dipped in 2010 but has since recovered to be at 62% in both 2014 and 2016. The minor decline in the proportion of visits coming from households with no children was arrested in 2014 and increased further in 2016, whilst the reverse is evident for households with at least one child (Figure 8.2-12).

Figure 8.2-11: NSW NPWS Visitors by Number of Children under 18 years in the Household
The proportion of visitors in 2014 and 2016 who are single aged 18-34 years with no children is at its highest level recorded, while the opposite is the case in 2016 for those married 35 years and over with no children (Figure 8.2-13). In relation to visitation, the proportion of singles 18-34 years with children, which was increasing over time, halved in 2016 (Figure 8.2-13). The largest segment of the population – married people aged 35 years and over with no children is continually under-represented in terms of both visitors and visitation to parks, and has declined again in 2016.
Figure 8.2-13: Visitors to NSW NPWS Parks by Respondent Life-cycle

Figure 8.2-14: Visitation to NSW NPWS Parks by Respondent Life-cycle
From wave 7 in 2016, a new demographic question on household income before tax was asked of all respondents. Survey data has been compared with population data for the relevant survey region. Orange ellipses indicate where a percentage is significantly different from ‘Total Respondent’ percentage.

It can be seen that the overall survey percentages (i.e. Total Respondents) for each income category (i.e. Total Respondents) do not differ greatly from the actual 2016 population percentages. Income category percentages for respondents that did not visit a park in NSW in the last four weeks remain similar to overall survey percentages. However, respondents who have visited a park in NSW in the last four weeks have over one third of respondents with household incomes above $104,000 per year (35%) compared with all survey respondents (27%). They also have significantly lower proportions with household incomes of less than $33,800 per year (8%) compared with the total (12%). Therefore those that have visited a park in NSW in the last 4 weeks tend to have slightly higher household incomes than the survey population overall. Similar results are evident for those that have visited a NSW NPWS park in the last 4 weeks (See Figure 8.12-15).

In terms of total visits to NSW NPWS parks in the last 4 weeks, household incomes are more closely aligned to the total survey population.

**Figure 8.2-15: Visitation to NSW NPWS Parks by Household Income**

* Waves 7-13 2016 only.
In terms of phone status of visitors to NSW NPWS parks, the proportion of adults visiting from mobile only households was significantly lower in 2012 than in 2014 and 2016, while the proportion was significantly higher in 2012 for adults visiting from households with both mobiles and landlines than in 2014 and 2016. While the proportion of visits from adults in households with both mobiles and landlines declined slightly (but not significantly so) in 2016, there was a significant increase in the proportion of visits from adults living in mobile only households over previous years (Figure 8.2.16).

Figure 8.2-16: Visitors and Visitation to NSW NPWS Parks by Phone Status

For the 2014 and 2016 surveys the question on languages usually spoken in the household was expanded to capture additional languages, with analysis provided below.

Table 8.2-17 provides details of all languages spoken in the household by visitors to NSW NPWS parks and by total visits made to NSW NPWS parks. In 2016, both visitors and visits to NSW NPWS parks by English Speakers declined significantly (94.2% visitors; 96.1% visits) from highs in 2012 (98.4% visitors; 98.8% visits). The proportion of people speaking other languages in the household was the highest yet observed for overall NSW NPWS park visitors in 2016 at 11.6%.

In terms of visits 2012 at 10.8% remains the year with the highest proportion of the total speaking a language other than English, with 2016 being the next highest proportion (9.7%).
Table 8.2-17 also shows that the dominant non-English language for those visiting a NSW NPWS park in 2016 was Mandarin (1.3%), whereas Spanish was the top ranked language in 2014 (1.1%). Other major languages for NSW NPWS park visitors in 2016 were Cantonese (1.2%), Spanish (1.0%), Arabic (0.7%) and French (0.7%).

In terms of visits to a NSW NPWS park, the dominant non-English language in 2016 was Portuguese (1.2%). This is interesting as only 0.3% of NSW NPWS park visitors were Portuguese in 2016, indicating that each Portuguese visitor must have visited NSW NPWS parks on multiple occasions (which was in fact the case – 9.5 visits on average). Other major languages in terms of NSW NPWS park visits in 2016 included Spanish (1.0%), Mandarin (0.9%), Aboriginal/Indigenous languages (0.9 from 0.2% visitors – i.e. average visits 14.0), and German (0.7%).

Table 8.2-17: NSW NPWS Visitors and Visits by Language Usually Spoken in the Household

<table>
<thead>
<tr>
<th>Language</th>
<th>Visited a PWG Park in Last 4 weeks</th>
<th>Adult Visits to a PWG Park in Last 4 weeks</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n=1,563</td>
<td>n=1,389</td>
</tr>
<tr>
<td>English</td>
<td>97.4%</td>
<td>96.8%</td>
</tr>
<tr>
<td>Total Languages other than English</td>
<td>8.1%</td>
<td>7.6%</td>
</tr>
<tr>
<td>Mandarin</td>
<td>1.2%</td>
<td>0.8%</td>
</tr>
<tr>
<td>Cantonese</td>
<td>0.3%</td>
<td>0.6%</td>
</tr>
<tr>
<td>Spanish</td>
<td>0.5%</td>
<td>0.7%</td>
</tr>
<tr>
<td>Arabic</td>
<td>0.1%</td>
<td>0.4%</td>
</tr>
<tr>
<td>German</td>
<td>0.6%</td>
<td>0.6%</td>
</tr>
<tr>
<td>Italian</td>
<td>0.4%</td>
<td>0.3%</td>
</tr>
<tr>
<td>Hindi</td>
<td>0.4%</td>
<td>0.2%</td>
</tr>
<tr>
<td>Tagalog (Filipino)</td>
<td>0.2%</td>
<td>0.4%</td>
</tr>
<tr>
<td>Greek</td>
<td>0.5%</td>
<td>0.1%</td>
</tr>
<tr>
<td>Vietnamese</td>
<td>0.5%</td>
<td>0.1%</td>
</tr>
<tr>
<td>Aboriginal/Indigenous Language</td>
<td>-</td>
<td>0.2%</td>
</tr>
<tr>
<td>Other Languages -</td>
<td>4.0%</td>
<td>3.9%</td>
</tr>
<tr>
<td>French</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Russian</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Portuguese</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Korean</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Japanese</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Punjabi</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Dutch</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Macedonian</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Other Languages</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

N.B. Totals sum to greater than 100% as some visitors can speak multiple languages.

8.3 Number of Individual Visits made (Last 4 Weeks) to NSW NPWS Managed Parks by Adults

More detailed discussion on frequency of adult visits is provided in section 7.1 of this document.
In summary, the average number of visits by adults declined to its lowest recorded figure in 2016 – 2.63 visits per adult visitor. This is comparable with the 2012 average of 2.67. Since the total number of adult visits in 2016 is the highest recorded (41.8m) and the average visits per adult is at its lowest, then the average number of adult visitors must have increased markedly in 2016 (i.e. the estimate is 15.9m adult visitors in 2016 compared with 10.8m in 2014).

In general, there has been a decline in average visitation from 2014 to 2016 across all regions of origin, with the exceptions of Remainder NSW and Melbourne. This partially explains why total adult visits from people living in Remainder NSW increased from 9.8m in 2014 to 14.7m in 2016 and why total visits from people living in Melbourne increased from 0.6m visits in 2014 to 1.6m visits in 2016 (although the increase in the overall number of visitors from these regions would also be a contributing factor).

**Figure 8.3-1: Average Number of Adult Visits (Last 4 Weeks) to NSW NPWS Parks by Region of Origin**

Across all survey years the average number of visits to NSW NPWS parks generally increases with age. 18-24 year olds have the lowest average number of visits (2.21), followed by 25-24 year olds (2.48), then 35-49 year olds (2.72), with those aged 50 years and over having the highest number of average visits (3.26) (N.B. data is not shown graphically). In general, the average number of visits from 18-24 year olds has been declining marginally over time (2.14 – 2008; 2.02 – 2016), as has average visits from 25-34 year olds and those aged 50
years and over. This is a potential indicator of increased disengagement amongst these groups. The opposite trend emerges for those age 35-49 years (2.37 – 2010; 2.84 – 2016).

8.4 Purpose of Visit to a NSW NPWS Park

From wave 7 in 2016 or the travel period 23 May to 12 December adult NSW NPWS park visitors were asked a new question in relation to each park they visited. The question was designed to elicit further information on their purpose of visit: The question was:

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?

Note that whilst the question was asked as a single response question, respondents could visit more than one NSW NPWS park in the 4 week survey period, so their purpose of visit could differ from park to park. For this reason overall, the question must be regarded as a multiple response question (i.e. the sum of all responses totals over 100%).

Over half of all respondents claimed that their visit to a NSW NPWS park was part of a day trip (54.2%), while just over one in five indicated that the NSW NPWS park visit was part of an overnight or multi-day trip (20.3%). Almost three in ten visits to NSW NPWS parks are part of a regular daily, weekly or monthly routine (29.2%). It cannot be determined whether the regular routine involved just a day visit or an overnight visit but it does point to the potential of high frequency low engagement (with the attributes of the park) activities such as taking a regular run. A small proportion named another purpose for this visit to a NSW NPWS park (3.5%).
Figure 8.4-1: Purpose of Visit to NSW NPWS Park 2016 (Waves 7-13)

The vast bulk of residents from NSW tend to visit NSW NPWS parks for day trips (58.1% - Sydney; 54.6% Remainder NSW), followed by visits which are part of a regular routine (31.8% - Sydney; 33.3% Remainder NSW), with relatively small proportions visiting as part of an overnight visit or multi-day trip (13.5% - Sydney; 17.9% Remainder NSW).

The vast bulk of visitors from Victoria and Brisbane visit NSW NPWS parks as part of an overnight visit or multi-day trip, obviously based on the need to travel some distance to access these parks (Melbourne – 71.4%, Remainder Victoria – 55.6%; Brisbane - 70.8%), with day trip visits and regular routine visits occurring at a much lower incidence. For ACT and Remainder Southern QLD residents, a day trip is the main purpose of the visit (49.6% - ACT; 50.6% - Remainder Southern QLD), but part of an overnight visit or multi-day trip is only marginally lower (42.3% - ACT; 40.6% Remainder Southern QLD). This indicates that this group have some regular NSW NPWS parks that are relatively close to home and can be visited on a day trip (which is not surprising, with the parks close to the ACT in the Southern Ranges and South Coast Regions and parks close to Remainder Southern QLD in the Northern Rivers and North Coast regions), while other parks are only accessed by travelling for longer distances.
No differences in purpose of visit were evident by sex of the respondent, but marked differences were evident by age of respondent (See Figure 8.4.3). *Day trip* visits are around 50% of the purpose for visit amongst those aged 35 years and over (50.2% - 35-49 year olds’ 50.5% - 50+ year olds), and only increase slightly for those aged 25-34 years (55.2%). However, for those aged 18-24 years over three quarters claim *day trips* as being their main purpose for visiting a NSW NPWS park (76.8%). The patterns for 35-49 year olds and those aged 50 years and over are remarkably similar, with around one third claiming that their visit is part of a *regular routine visit* and around one in five claiming their visit to be part of an *overnight trip or multi-day trip*. Those aged 25-34 have similar proportions claiming the purpose of their visit to be part of a *regular routine* (23.0%) or part of an *overnight trip* (22.6%).
With differences observed in purpose of visit by age, it might be assumed that differences would be observed by number of children in the household. However, this is not the case, with no significant differences evident. That being said there was a slight increase in respondents claiming their visit was part of an overnight trip or multi-day trip by number of children in the household (1 child – 17.5%; 2 children – 22.9%; 3 or more children 25.9%) (N.B. data is not shown graphically).

Not surprisingly, people who have visited a NSW NPWS park once had the highest proportion claiming their visit was part of a day trip. This proportion declines with the number of visits made to NSW NPWS parks down to 31.9% for those visiting a NSW NPWS park 5 or more times (See Figure 8.4-3). Conversely, the proportion claiming their visit was part of a regular, routine visit was lowest for those visiting a NSW NPWS park once (11.3%) and increased with every additional visit made to 74.8% for those making 5 or more visits to NSW NPWS parks.

Interestingly, incidence of visiting a NSW NPWS park as part of an overnight visit or multi-day trip declined with the number of visits made to a NSW NPWS park (from 24.3% of one visit, to 5.4% for 4 visits).
8.5 Reason for Visit to a NSW NPWS Park

As of wave 7 in 2016 from the travel period 23 May to 12 December adult NSW NPWS Park visitors were also asked another new question for each different NSW NPWS park they visited which sought to elicit information on the role of the NSW NPWS in initiating their overall trip.

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)?

Note that whilst the question was asked as a single response question, respondents could visit more than one NSW NPWS park in the 4 week survey period, so the reason for their visit to each park could differ from park to park. For this reason 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 only reason through to 0% for not one of the reasons).
Figure 8.5-1 shows that just over one third of NSW NPWS park visitors indicated that the *only reason* for their trip was to visit the NSW NPWS Park (34.0%), while just under one third indicated that the park was their *main reason* for their trip (31.5%). One in six claimed the park visit was *one of the main reasons* for their trip (16.5%), while less than one in six claimed the park visit was *only a minor reason* for their trip (15.6%). Less than one in ten indicated that the park was *not one of the reasons* for their trip (8.8%).

The overall mean score is 66.5%, which indicates that a visit to a NSW NPWS park is either one’s *main reason* for the visit or *one of the main reasons* for the visit.

**Figure 8.5-1: Reason for Visit to NSW NPWS Park 2016 (Waves 7-13)**

When analysed by region of origin (Figure 8.5-2) around 7 in ten people from NSW claim that their visit to the NSW NPWS park was their *only reason* or their *main reason* for their trip (70.2% - Sydney; Remainder NSW – 68.7). This is reflected in the mean scores the NSW region of 69.4% for people living in Sydney and 67.7% for people living in Remainder NSW.

Proportions of reasons for visit were reasonably evenly spread for people living in the ACT, with just under half claiming that their visit to the NSW NPWS park was their *only reason* or their *main reason* for their trip (48.6%), attaining a mean score of 55.7%. A similarly even spread was evident for people living in Remainder Southern Queensland, but with the
highest proportion (29.3%) indicating that the visit was a minor reason for the trip, resulting in the mean score being slightly lower at 46.1%

People in Remainder Victoria have a high proportion claiming that their NSW NPWS park visit was the main reason for their trip 48.3%, but a similar proportion (42.7%) indicated that the visits was not one or only a minor reason for their trip, lowering the mean score to 48.2%.

Melbourne and Brisbane respondents had the highest proportions indicating that visiting the NSW NPWS Park was not one of the reasons for their trip (47.0% and 37.2% respectively). The only difference was that Brisbane had just over four in ten respondents indicating that the park visit was the only or the main reason for the trip (41.7%) compared with just 9.3% for Melbourne respondents. As such, the mean score for Melbourne respondents was extremely low (23.4%) compared with Brisbane respondents (41.7%).

**Figure 8.5-2: Reason for Visit to NSW NPWS Park 2016 by Region of Origin (Waves 7-13)**

No discernible differences in reason for visit were observed by sex of the respondent. In relation to age of respondent, the only difference of significance was that 25-34 year olds had a lower proportion claiming that their visit to a NSW NPWS park was their only reason for their visit (25.2%) compared with other age groups. This resulted in the 25-34 year old mean score being statistically lower than it was for the other aged groups (61.2%) (See Figure 8.5-3).
When reason for visit was analysed by the number of children in the household, being the only reason for one’s trip was significantly higher for households with three or more children (47.5%) than it was for those with no children in the household (32.9%) or one child in the household (28.3%). Hence the mean score increases with the number of children in the household from 67.6% for no children in the household to 74.5% for 3 or more children in the household. More detail can be found in Figure 8.5-4.
The proportion claiming that the NSW NPWS Park was the only reason for their trip increases with the number of trips made to NSW NPWS parks up to 4 visits. It then declines for 5 or more visits. The means score follows the same pattern (See Figure 8.5-4).

When reason for visit is analysed by purpose of visit it is clear that those that visit NSW NPWS parks as part of a regular routine have the highest proportions claiming that visiting
the park was their *only reason* for their trip (46.5%). The mean score for this group was
significantly higher than other groups at 72.9%. Those who visited a NSW NPWS park on a
day trip had over 7 in 10 respondents claiming that their visit was the *only reason* or the
*main reason* for their trip (67.6%). Hence their mean score was 71.2%. However, those who
visited a NSW NPWS park as *part of an overnight visit or multi-day trip* had an even spread
of reasons for their trip. This resulted in a mean score of 49.4%.

Figure 8.5-5: Reason for Visit to NSW NPWS Park 2016 by Number of Visits (Waves 7-13)

8.6 Activities Undertaken at Most Recently Visited Park

Respondents who had visited a NSW NPWS park were asked what activities they undertook
on their *most recent* visit. Almost all of those who visited a NSW NPWS park did some sort
of ‘activity’, with 99% nominating a specific activity in each of the years from 2008 to 2016.

The detailed list of activities is grouped into broader categories for analysis (see figure 8.6-
1a and 1b). The most common grouped activity undertaken at NSW NPWS parks was
walking, which was undertaken by a significantly high 63% of people in 2016. This was
followed by water-based recreation, which had been increasing slightly (but not
significantly) over time (20% - 2014; 19% - 2012; 18% - 2010; 17% - 2008), but dropped to
2008 levels in 2016 (17%). Picnicking and dining, which fell to its lowest recorded level of
11% in 2014, rebounded to 14% in 2016. Touring and sightseeing rebounded from its
depression in 2010 and 2012 to 13% in each of 2014 and 2016. All other activities included in
the questionnaire were only nominated by small proportions of respondents, with significance testing provided to highlight any changes over time.

**Figure 8.6-1a: Activities Undertaken on Most Recent Visit to a NSW NPWS Park (Part 1)**

**Figure 8.6-1b: Activities Undertaken on Most Recent Visit to a NSW NPWS Park (Part 2)**

Table 8.6-1 lists the four most commonly nominated activities undertaken by visitors on their most recent visit to a NSW NPWS park. Within this, a further breakdown of the specific
activities has been provided for each of the four broad categories. Comparisons have been provided for all survey years.

Incidence of walking decreased significantly in 2014 to its lowest level recorded (49%), but rebounded to its highest level recorded in 2016 (63%), primarily due to the increase in walking/bushwalking (52% - 2008; 49% - 2010; 55% - 2012; 48% - 2014; 63% - 2016).

Incidence of undertaking water-based recreation declined in 2016, due to the significant decline in the proportion of visitors fishing and rowing, rafting, canoeing and kayaking, while the larger proportion nominating swimming has continued to increase gradually over time.

The increase in the proportion of visitors picnicking and dining in 2016 is directly related to the significant increase in visitors having picnics and barbecues, while the overall size of the touring and sightseeing group was maintained in 2016 due to significant increases in sightseeing, offsetting significant decreases in those undertaking scenic driving and visiting lookouts and scenery.

Table 8.6-1: Most Common Activity Undertaken at Most Recently Visited NSW NPWS Park in last 4 weeks

<table>
<thead>
<tr>
<th>Activities undertaken on one’s most recent visit to a PWG park</th>
<th>Most recent visit to a PWG park in the last 4 weeks</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ACTIVITY - SUMMARY</strong></td>
<td>n=1,487</td>
</tr>
<tr>
<td>Walking</td>
<td></td>
</tr>
<tr>
<td>Orienteering And Rogaining</td>
<td>*</td>
</tr>
<tr>
<td>Walking The Dog</td>
<td>2%</td>
</tr>
<tr>
<td>Walking/ Bushwalking</td>
<td>52%</td>
</tr>
<tr>
<td><strong>Walking Total</strong></td>
<td>54%</td>
</tr>
<tr>
<td>Water-Based Recreation</td>
<td></td>
</tr>
<tr>
<td>Fishing</td>
<td>4%</td>
</tr>
<tr>
<td>Motor Boating/ Parasailing</td>
<td>1%</td>
</tr>
<tr>
<td>Rowing/ Rafting/ Canoeing/ Kayaking</td>
<td>1%</td>
</tr>
<tr>
<td>Sailing/ Kite Surfing/ Sail Boarding</td>
<td>1%</td>
</tr>
<tr>
<td>Scuba Diving/ Snorkelling</td>
<td>*</td>
</tr>
<tr>
<td>Surfing</td>
<td>2%</td>
</tr>
<tr>
<td>Swimming</td>
<td>8%</td>
</tr>
<tr>
<td>Waterskiing</td>
<td>*</td>
</tr>
<tr>
<td><strong>Water-Based Recreation Total</strong></td>
<td>17%</td>
</tr>
<tr>
<td>Picnicking And Dining</td>
<td></td>
</tr>
<tr>
<td>Dining/ Eating At Food Outlets</td>
<td>2%</td>
</tr>
<tr>
<td>Picnicking And Barbecues</td>
<td>11%</td>
</tr>
<tr>
<td><strong>Picnicking And Dining Total</strong></td>
<td>14%</td>
</tr>
<tr>
<td>Touring And Sightseeing</td>
<td></td>
</tr>
<tr>
<td>Holiday/ Break Away/ Weekend Trip</td>
<td>*</td>
</tr>
<tr>
<td>Lookouts And Scenery</td>
<td>2%</td>
</tr>
<tr>
<td>Scenic Driving</td>
<td>3%</td>
</tr>
<tr>
<td>Sightseeing</td>
<td>7%</td>
</tr>
<tr>
<td><strong>Touring And Sightseeing Total</strong></td>
<td>12%</td>
</tr>
</tbody>
</table>

* Less than 0.5% response.

Table 8.6-2 shows that the proportion of park visitors undertaking walking activities in 2016 increased significantly across all states of origin, with the exception of Victoria. The
proportions undertaking water-based recreation increased significantly for ACT residents, but decreased significantly for both NSW and Southeast QLD residents. Proportions undertaking *picnicking and dining* activities increased significantly for those visitors living in NSW and Victoria. *Touring and sightseeing* activities in 2016 were relatively stable across all regions of origin in 2016.

Table 8.6-2: Main Activities at most recently visited NSW NPWS Park by State of Origin

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Walking</td>
<td>53%</td>
<td>50%</td>
<td>55%</td>
<td>49%</td>
<td>64%</td>
<td>54%</td>
<td>45%</td>
<td>63%</td>
<td>45%</td>
<td>48%</td>
</tr>
<tr>
<td>Water-Based Recreation</td>
<td>18%</td>
<td>18%</td>
<td>19%</td>
<td>20%</td>
<td>17%</td>
<td>14%</td>
<td>19%</td>
<td>22%</td>
<td>12%</td>
<td>25%</td>
</tr>
<tr>
<td>Picnicking And Dining</td>
<td>14%</td>
<td>18%</td>
<td>16%</td>
<td>11%</td>
<td>14%</td>
<td>5%</td>
<td>6%</td>
<td>8%</td>
<td>8%</td>
<td>16%</td>
</tr>
<tr>
<td>Touring And Sightseeing</td>
<td>12%</td>
<td>10%</td>
<td>8%</td>
<td>13%</td>
<td>12%</td>
<td>20%</td>
<td>11%</td>
<td>19%</td>
<td>26%</td>
<td>22%</td>
</tr>
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</table>

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<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Walking</td>
<td>52%</td>
<td>60%</td>
<td>52%</td>
<td>50%</td>
<td>67%</td>
<td>59%</td>
<td>52%</td>
<td>54%</td>
<td>49%</td>
<td>70%</td>
<td>52%</td>
<td>60%</td>
<td>52%</td>
<td>50%</td>
<td>67%</td>
</tr>
<tr>
<td>Water-Based Recreation</td>
<td>12%</td>
<td>21%</td>
<td>17%</td>
<td>18%</td>
<td>26%</td>
<td>14%</td>
<td>25%</td>
<td>23%</td>
<td>23%</td>
<td>13%</td>
<td>14%</td>
<td>7%</td>
<td>13%</td>
<td>14%</td>
<td>9%</td>
</tr>
<tr>
<td>Picnicking And Dining</td>
<td>7%</td>
<td>11%</td>
<td>6%</td>
<td>8%</td>
<td>6%</td>
<td>14%</td>
<td>7%</td>
<td>13%</td>
<td>14%</td>
<td>9%</td>
<td>13%</td>
<td>12%</td>
<td>12%</td>
<td>12%</td>
<td>14%</td>
</tr>
<tr>
<td>Touring And Sightseeing</td>
<td>13%</td>
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<td>9%</td>
<td>12%</td>
<td>12%</td>
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<td>9%</td>
<td>16%</td>
<td>13%</td>
<td>12%</td>
<td>12%</td>
<td>12%</td>
<td>14%</td>
</tr>
</tbody>
</table>

As can be seen in Figure 8.6-3, people of almost all ages were significantly more likely to undertake *walking* activities than in previous years, with the exception of males aged 50 years and over (where 59% in 2016 for this group is marginally lower than the peak of 61% observed in 2012).

A significant decline from 2014 levels in *water-based recreation* was observed for males 18-24 years and females aged 25-34 years in 2016.

No significant changes were observed for age by sex for *picnicking and dining* activities in 2016.

Significant increases in 2016 for *touring and sightseeing* activities were observed for males aged 18-24 years and males 35-49 years. However, significant declines were also observed in 2016 for *touring and sightseeing* activities amongst males aged 50 years and over and females aged 18-24 years. As a result, the overall proportion remained at 13% for both 2014 and 2016.
When walking activities are analysed by survey wave (Figure 8.6-5), it can be seen that the proportion undertaking walking activities in 2016 is either approximately equal to the highest proportions attained in each wave in previous years or is higher than proportions attained in previous years. Incidence of walking in 2016 is significantly higher than other years in (waves 1 and 2) mid-late summer, (Wave 7) early winter – school holidays, and (wave 10) late winter- early spring.

Water-based recreation activities follow a general trend of high incidence through summer and autumn, then low incidence over winter, increasing again over spring (Figure 8.6-6). This trend is evident across all survey years. The trend is not surprising as weather conditions in winter are likely to deter water-based activities, while summer temperatures are likely to encourage them. In 2016, with annual incidence of undertaking water-based activities returning to 2008 and 2010 levels, the lowest incidence rates recorded were evident in waves 2, 4, 10, 11 and 12, with the equal lowest level recorded in wave 7.

<table>
<thead>
<tr>
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<tbody>
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<td>32%</td>
<td>49%</td>
<td>32%</td>
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<td>Male 25-34 yrs</td>
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<td>38%</td>
<td>54%</td>
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<tr>
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<td>49%</td>
<td>38%</td>
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<td>47%</td>
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<td>48%</td>
<td>59%</td>
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<tr>
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<td>26%</td>
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<tr>
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<td>Male 50+ yrs</td>
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<td>14%</td>
<td>18%</td>
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<td>25%</td>
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<tr>
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<td>12%</td>
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<td>14%</td>
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<tr>
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<td>Male 35-49 yrs</td>
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<td>14%</td>
<td>17%</td>
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<tr>
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<td>Male 50+ yrs</td>
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<td>15%</td>
<td>12%</td>
<td>8%</td>
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<tr>
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<td>Female 18-24 yrs</td>
<td>20%</td>
<td>21%</td>
<td>14%</td>
<td>15%</td>
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</tr>
<tr>
<td></td>
<td>Female 25-34 yrs</td>
<td>18%</td>
<td>17%</td>
<td>29%</td>
<td>10%</td>
<td>20%</td>
</tr>
<tr>
<td></td>
<td>Female 35-49 yrs</td>
<td>16%</td>
<td>19%</td>
<td>13%</td>
<td>10%</td>
<td>15%</td>
</tr>
<tr>
<td></td>
<td>Female 50+ yrs</td>
<td>13%</td>
<td>16%</td>
<td>18%</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>Touring And Sight-seeing</td>
<td>Male 18-24 yrs</td>
<td>10%</td>
<td>5%</td>
<td>6%</td>
<td>8%</td>
<td>18%</td>
</tr>
<tr>
<td></td>
<td>Male 25-34 yrs</td>
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<td>12%</td>
<td>9%</td>
<td>11%</td>
<td>12%</td>
</tr>
<tr>
<td></td>
<td>Male 35-49 yrs</td>
<td>8%</td>
<td>7%</td>
<td>8%</td>
<td>11%</td>
<td>13%</td>
</tr>
<tr>
<td></td>
<td>Male 50+ yrs</td>
<td>21%</td>
<td>16%</td>
<td>9%</td>
<td>16%</td>
<td>15%</td>
</tr>
<tr>
<td></td>
<td>Female 18-24 yrs</td>
<td>18%</td>
<td>17%</td>
<td>*</td>
<td>14%</td>
<td>7%</td>
</tr>
<tr>
<td></td>
<td>Female 25-34 yrs</td>
<td>10%</td>
<td>5%</td>
<td>6%</td>
<td>8%</td>
<td>10%</td>
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<tr>
<td></td>
<td>Female 35-49 yrs</td>
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<td>10%</td>
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<tr>
<td></td>
<td>Female 50+ yrs</td>
<td>12%</td>
<td>11%</td>
<td>16%</td>
<td>17%</td>
<td>15%</td>
</tr>
</tbody>
</table>
Incidence of undertaking *picnicking and dining* tended to be relatively stable across the year for 2008, 2010 and 2012, as figure 8.6-7 shows. The 2008 year tends to have proportions undertaking *picnicking and dining* that are slightly lower than in 2010 and 2012. From 2014 onwards, incidence of *picnicking and dining* tends to be higher at the beginning of the year and to steadily decline toward the end of the year. Of note is that the incidence of *picnicking and dining* is the lowest recorded in (wave 5) Easter, Anzac Day and school holidays of 2016 (8%) and is significantly lower than levels recorded in 2008, 2010 and 2012 (16%, 19% and 18% respectively). Normally it would be considered that Easter, Anzac Day and school holidays, would be a time when levels of engagement in this activity would be relatively high.

*Touring and sightseeing* activities have generally remained stable across each survey year (slightly higher at the start of the year and slightly lower at the end of the year). 2010 proportions however, are generally lower from mid-autumn to mid-winter, which is most likely reason why the annual figure for 2012 is significantly lower than for other years (Figure 8.6-8). In 2014 proportions for this activity were generally higher than in other years from late summer through autumn, resulting in a slightly higher annual average. In 2016, proportions tended to be higher from March to the end of June, keeping the annual average on par with 2014 levels.
Figure 8.6-5: Walking Activities undertaken at most recently visited NSW NPWS Park by Wave

- W1 - School holidays; Christmas; New Year
- W2 - School holidays Australia Day
- W8 - School holidays
- W9 - QLD - Show Day
- W10 - School holidays VIC 2016
- W11 - School holidays; NSW & ACT – Labour Day; ACT - Family & Community Day 2012
- W12 - VIC - Melbourne Cup ACT - Family & Community Day 2014
- W13 - School holidays QLD 2016

% recent visit to PWG park
Figure 8.6-6: Water-based Activities undertaken at most recently visited NSW NPWS Park by Wave

Significantly lower than 2016 estimate

Significantly higher than 2016 estimate

W1 - School holidays; Christmas; New Year
W2 - School holidays Australia Day
W3 - School holidays ACT
W4 - ACT – Canberra Day
W7 - School holidays –VIC & QLD 2008 & 2010 (QLD 2016) Queen’s Birthday (QLD 2016)
W8 - School holidays
W9 - QLD - Show Day
W10 - School holidays VIC 2016
W11- School holidays; NSW & ACT – Labour Day; ACT - Family & Community Day 2012
W13 - School holidays QLD 2016

Legend:
- Water-Based Recreation - 2008
- Water-Based Recreation - 2010
- Water-Based Recreation - 2012
- Water-Based Recreation - 2014
- Water-Based Recreation - 2016
Figure 8.6-7: Picnicking and Dining Activities undertaken at most recently visited NSW NPWS Park by Wave

<table>
<thead>
<tr>
<th>Wave</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>W1</td>
<td>School holidays; Christmas; New Year</td>
</tr>
<tr>
<td>W2</td>
<td>School holidays Australia Day</td>
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<tr>
<td>W3</td>
<td>- School holidays</td>
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<tr>
<td>W4</td>
<td>ACT – Canberra Day</td>
</tr>
<tr>
<td>W5</td>
<td>VIC – Labour Day; Easter 2008, 2016</td>
</tr>
<tr>
<td>W6</td>
<td>School Holidays 2008 – VIC, QLD</td>
</tr>
<tr>
<td>W7</td>
<td>VIC -QLD 2008 &amp; 2010 (QLD 2010)</td>
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<tr>
<td>W8</td>
<td>School holidays</td>
</tr>
<tr>
<td>W9</td>
<td>QLD - School holidays</td>
</tr>
<tr>
<td>W10</td>
<td>VIC – School holidays</td>
</tr>
<tr>
<td>W11</td>
<td>VIC – School holidays</td>
</tr>
<tr>
<td>W12</td>
<td>VIC – School holidays</td>
</tr>
<tr>
<td>W13</td>
<td>School holidays QLD 2016</td>
</tr>
</tbody>
</table>

Significantly lower than 2016 estimate

Significantly higher than 2016 estimate

*Roy Morgan Research for NSW OEH*
Figure 8.6-8: Touring and Sightseeing Activities undertaken at most recently visited NSW NPWS Park by Wave

<table>
<thead>
<tr>
<th>Wave</th>
<th>Event Details</th>
</tr>
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<tbody>
<tr>
<td>W1</td>
<td>School holidays; Christmas; New Year</td>
</tr>
<tr>
<td>W2</td>
<td>School holidays Australia Day</td>
</tr>
<tr>
<td>W3</td>
<td>ACT – Canberra Day</td>
</tr>
<tr>
<td>W8</td>
<td>School holidays</td>
</tr>
<tr>
<td>W9</td>
<td>QLD – Show Day</td>
</tr>
<tr>
<td>W10</td>
<td>School holidays VIC 2016</td>
</tr>
</tbody>
</table>

Significantly lower than 2014 estimate

Significantly higher than 2014 estimate
Analysing main activities by purpose of trip Figure 8.6-9 yields some interesting results. *Walking* is most prevalent among those visiting the park as part of a regular routine (69%) and is significantly lower for those visiting as part of an overnight visits or multi-day trip (58%). *Water-based recreation* has a significantly lower incidence when the park visit is for some other reason (4%).

Most notable is that people taking day trips have a significantly higher proportion undertaking *picnicking and dining* (16%) and *touring and sightseeing* (15%) than those visiting NSW NPWS parks for other reasons.

Not surprisingly, participating in *snow sports* (12%) and *camping and accommodation* (17%) is significantly higher among those visiting the park as part of an overnight or multi-day trip than those visiting for other reasons. Similarly, *cycling* (7%) is significantly higher amongst those visiting a park as part of a regular, routine visit than for those visiting for other reasons. (Not shown graphically)

**Figure 8.6-9: Main Activities at most recently visited NSW NPWS Park by Purpose of Trip (Waves 7-13) 2016**

Participation in *snow sports* was significantly higher for those claiming that their *only reason for their trip* was to visit a NSW NPWS park (7%) compared with those providing other reasons for their trip. (Not shown graphically)
8.7 Satisfaction with Most Recent Visit to a NSW NPWS Park

Respondents who had visited a NSW NPWS park were asked to give an overall satisfaction rating based on the experience on their most recent visit. Figure 8.7-1 shows that in both 2008 and 2010 57% of visitors indicated that they were very satisfied with their most recent park experience, while in 2012 and 2016 the very satisfied proportion increased to 60%. This was significantly higher than the 2008 figure. In 2008 nine in ten were at least satisfied with their park visit (i.e. sum of those satisfied or very satisfied), with this proportion increasing to 93% in 2010 and 2012, and increasing again to 94% in 2014 and 2016. The 2008 figure of 90% is significantly lower than all other years.

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

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

Those answering can’t say were excluded from the mean satisfaction score calculation.

The closer the mean score to 2 points, the higher the level of satisfaction. As can be seen, in 2008 and 2010 the mean scores were similar at 1.47 and 1.48 respectively, while in 2012 and 2014 the mean rose to 1.50, while in 2016 it again rose to 1.52, which is significantly higher than the 2008 and 2010 mean scores.

Figure 8.7-1: Satisfaction with experience at most recently visited NSW NPWS park

The proportion very satisfied with their park experience is the highest recorded in 2016 amongst visitors from remainder NSW and remainder VIC (67%). In 2016 the proportion
‘total satisfied’ was the highest or equal highest recorded for visitors from Sydney (95%), remainder NSW (93%) and ACT (96%) (Table 8.7-1)

In general, mean scores for satisfaction in 2016 were equivalent or higher than previous years across all survey regions, with scores highest or equal highest in Sydney, remainder NSW, ACT, Melbourne, remainder VIC, Brisbane and remainder southeast QLD. The mean score for visitors from ACT has been increasing steadily each year.

Table 8.7-1: Satisfaction with most recently visited NSW NPWS park by Region of Origin

<table>
<thead>
<tr>
<th>Region of Origin</th>
<th>Year</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Neither Satisfied nor Dissatisfied</th>
<th>Dissatisfied</th>
<th>Very Dissatisfied</th>
<th>Can’t Say</th>
<th>Total Satisfied</th>
<th>Mean</th>
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<td>Sydney</td>
<td>2008</td>
<td>57%</td>
<td>34%</td>
<td>4%</td>
<td>1%</td>
<td>1%</td>
<td>3%</td>
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<td>2010</td>
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<td>*</td>
<td>*</td>
<td>95%</td>
<td>1.53</td>
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<tr>
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<td>4%</td>
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<td>-</td>
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<td>2010</td>
<td>49%</td>
<td>32%</td>
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<td>81%</td>
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<td>57%</td>
<td>31%</td>
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<td>2014</td>
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<td>96%</td>
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<td>2016</td>
<td>67%</td>
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<tr>
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<td>94%</td>
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<td>93%</td>
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<td>39%</td>
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<td>2016</td>
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<tr>
<td>Remainder SE QLD</td>
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<td>2010</td>
<td>54%</td>
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<td>91%</td>
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<td>2012</td>
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<td>98%</td>
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<tr>
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<td>1%</td>
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<td>90%</td>
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<td>2010</td>
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<td>2012</td>
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<td>2014</td>
<td>59%</td>
<td>35%</td>
<td>3%</td>
<td>1%</td>
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<td>94%</td>
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<td>2016</td>
<td>60%</td>
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<td>*</td>
<td>94%</td>
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<td>Total Interstate</td>
<td>2008</td>
<td>54%</td>
<td>36%</td>
<td>3%</td>
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<td>90%</td>
<td>1.42</td>
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<td></td>
<td>2010</td>
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<td>36%</td>
<td>4%</td>
<td>3%</td>
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<td>1%</td>
<td>90%</td>
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<td>2012</td>
<td>59%</td>
<td>35%</td>
<td>4%</td>
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<td>94%</td>
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<td>2016</td>
<td>61%</td>
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<td>5%</td>
<td>1%</td>
<td>*</td>
<td>1%</td>
<td>95%</td>
<td>1.55</td>
</tr>
</tbody>
</table>

Table 8.7-2 shows that females generally have higher levels of satisfaction with their most recent experience at a NSW NPWS park than do males. While the mean satisfaction rating
for males has hovered around 1.44 across all years, the mean for females is consistently higher (1.51 – 2008; 1.52 – 2010; 1.57 – 2012; 1.53 – 2014; 1.62 – 2016). The proportion of males being at least satisfied (i.e. very satisfied + satisfied) with their park visit is at its highest level in 2016 (93%); as is the proportion of females being at least satisfied (96%).

The general trend by age for satisfaction with most recent park visit experience from 2008 to 2016 is that satisfaction increases with age (2012 being the only exception). 18-24 year olds generally had lower mean levels of satisfaction, with means increasing and peaking with those aged 50 years and over. In 2012 and 2014, the lowest level of mean satisfaction was for 25-34 year olds (1.41 and 1.35 respectively), while the mean for 18-24 year olds was higher (1.46 and 1.48 respectively). In 2016 however, the original trend prevailed with 18-24 year olds having the lowest level of mean satisfaction (1.40).

Table 8.7-2: Satisfaction with most recently visited NSW NPWS Park by Sex and Age

<table>
<thead>
<tr>
<th>Region of Origin</th>
<th>Year</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Neither Satisfied nor Dissatisfied</th>
<th>Dissatisfied</th>
<th>Very Dissatisfied</th>
<th>Can’t Say</th>
<th>Total Satisfied</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Males</td>
<td>2008</td>
<td>63%</td>
<td>36%</td>
<td>4%</td>
<td>2%</td>
<td>1%</td>
<td>3%</td>
<td>89%</td>
<td>1.43</td>
</tr>
<tr>
<td></td>
<td>2010</td>
<td>54%</td>
<td>38%</td>
<td>3%</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
<td>92%</td>
<td>1.44</td>
</tr>
<tr>
<td></td>
<td>2012</td>
<td>56%</td>
<td>36%</td>
<td>4%</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
<td>91%</td>
<td>1.44</td>
</tr>
<tr>
<td></td>
<td>2014</td>
<td>59%</td>
<td>34%</td>
<td>4%</td>
<td>2%</td>
<td>2%</td>
<td>*</td>
<td>92%</td>
<td>1.47</td>
</tr>
<tr>
<td></td>
<td>2016</td>
<td>55%</td>
<td>38%</td>
<td>4%</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
<td>93%</td>
<td>1.44</td>
</tr>
<tr>
<td>Females</td>
<td>2008</td>
<td>61%</td>
<td>30%</td>
<td>3%</td>
<td>2%</td>
<td>1%</td>
<td>3%</td>
<td>90%</td>
<td>1.51</td>
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<td></td>
<td>2010</td>
<td>60%</td>
<td>34%</td>
<td>4%</td>
<td>2%</td>
<td>*</td>
<td>*</td>
<td>94%</td>
<td>1.52</td>
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<td></td>
<td>2012</td>
<td>65%</td>
<td>29%</td>
<td>2%</td>
<td>1%</td>
<td>2%</td>
<td>*</td>
<td>95%</td>
<td>1.57</td>
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<td></td>
<td>2014</td>
<td>60%</td>
<td>36%</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
<td>*</td>
<td>95%</td>
<td>1.53</td>
</tr>
<tr>
<td></td>
<td>2016</td>
<td>67%</td>
<td>29%</td>
<td>3%</td>
<td>1%</td>
<td>*</td>
<td>*</td>
<td>96%</td>
<td>1.62</td>
</tr>
<tr>
<td>18-24 yrs</td>
<td>2008</td>
<td>41%</td>
<td>52%</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
<td>3%</td>
<td>93%</td>
<td>1.34</td>
</tr>
<tr>
<td></td>
<td>2010</td>
<td>45%</td>
<td>49%</td>
<td>6%</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>94%</td>
<td>1.39</td>
</tr>
<tr>
<td></td>
<td>2012</td>
<td>51%</td>
<td>43%</td>
<td>3%</td>
<td>-</td>
<td>1%</td>
<td>2%</td>
<td>94%</td>
<td>1.46</td>
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<tr>
<td></td>
<td>2014</td>
<td>59%</td>
<td>34%</td>
<td>5%</td>
<td>-</td>
<td>2%</td>
<td>-</td>
<td>93%</td>
<td>1.48</td>
</tr>
<tr>
<td></td>
<td>2016</td>
<td>51%</td>
<td>43%</td>
<td>4%</td>
<td>1%</td>
<td>2%</td>
<td>-</td>
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<td>1.40</td>
</tr>
<tr>
<td>25-34 yrs</td>
<td>2008</td>
<td>48%</td>
<td>40%</td>
<td>5%</td>
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<td>1%</td>
<td>5%</td>
<td>88%</td>
<td>1.39</td>
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<td></td>
<td>2010</td>
<td>54%</td>
<td>40%</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
<td>*</td>
<td>94%</td>
<td>1.44</td>
</tr>
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<td></td>
<td>2012</td>
<td>52%</td>
<td>41%</td>
<td>4%</td>
<td>1%</td>
<td>1%</td>
<td>-</td>
<td>93%</td>
<td>1.41</td>
</tr>
<tr>
<td></td>
<td>2014</td>
<td>48%</td>
<td>43%</td>
<td>5%</td>
<td>2%</td>
<td>1%</td>
<td>-</td>
<td>92%</td>
<td>1.35</td>
</tr>
<tr>
<td></td>
<td>2016</td>
<td>52%</td>
<td>42%</td>
<td>4%</td>
<td>2%</td>
<td>-</td>
<td>1%</td>
<td>94%</td>
<td>1.45</td>
</tr>
<tr>
<td>35-49 yrs</td>
<td>2008</td>
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<td>26%</td>
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<td>3%</td>
<td>2%</td>
<td>2%</td>
<td>90%</td>
<td>1.50</td>
</tr>
<tr>
<td></td>
<td>2010</td>
<td>58%</td>
<td>35%</td>
<td>3%</td>
<td>3%</td>
<td>*</td>
<td>*</td>
<td>94%</td>
<td>1.50</td>
</tr>
<tr>
<td></td>
<td>2012</td>
<td>61%</td>
<td>31%</td>
<td>4%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>92%</td>
<td>1.51</td>
</tr>
<tr>
<td></td>
<td>2014</td>
<td>65%</td>
<td>30%</td>
<td>3%</td>
<td>2%</td>
<td>1%</td>
<td>-</td>
<td>94%</td>
<td>1.55</td>
</tr>
<tr>
<td></td>
<td>2016</td>
<td>61%</td>
<td>34%</td>
<td>3%</td>
<td>2%</td>
<td>1%</td>
<td>-</td>
<td>94%</td>
<td>1.52</td>
</tr>
<tr>
<td>50+ yrs</td>
<td>2008</td>
<td>60%</td>
<td>30%</td>
<td>4%</td>
<td>2%</td>
<td>1%</td>
<td>4%</td>
<td>90%</td>
<td>1.51</td>
</tr>
<tr>
<td></td>
<td>2010</td>
<td>61%</td>
<td>30%</td>
<td>4%</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
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<td></td>
<td>2012</td>
<td>66%</td>
<td>28%</td>
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<td>1%</td>
<td>94%</td>
<td>1.55</td>
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<tr>
<td></td>
<td>2014</td>
<td>61%</td>
<td>34%</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>95%</td>
<td>1.54</td>
</tr>
<tr>
<td></td>
<td>2016</td>
<td>67%</td>
<td>27%</td>
<td>3%</td>
<td>1%</td>
<td>*</td>
<td>1%</td>
<td>94%</td>
<td>1.60</td>
</tr>
</tbody>
</table>

Satisfaction levels of those visiting a NSW NPWS park by the main activity undertaken while visiting show that mean satisfaction scores increased for walking activities from 2008 to 2012, declined slightly in 2014 and increased to the highest levels recorded in 2016 (1.58) (Figure 8.7-6).
Mean satisfaction levels in 2010 to 2012 and 2014 to 2016 for water-based recreation were markedly higher than in 2008. The proportion very satisfied has increased from 58% in 2008 to 65% in 2012 and has since declined to 64% in 2014 and 62% in 2016.

Mean satisfaction scores in 2010 and 2012 for picnicking and dining are the highest attained across all activities (1.59 in 2010 and 1.60 in 2012). The 2014 mean was marginally lower at 1.57 and declined again to 1.54 in 2016. Mean satisfaction scores for touring and sightseeing increased from 2008 to 2012, with the proportion very satisfied increasing from 52% in 2008 to 61% over the same period. Those very satisfied had been lower in both 2014 and 2016 (55% and 57% respectively). Mean satisfaction has remained relatively stable since 2012 (1.49 – 2012, 1.46 – 2014; 1.48 – 2016).

Analysing satisfaction by purpose of visit (waves 7-13 in 2016 only) (see Figure 8.7-7), shows the mean satisfaction score was highest for those visiting a NSW NPWS park as part of an overnight visit (1.56), was second highest for those that visited the park as part of a regular routine (1.52), with the mean for those visiting as part of a day trip coming in third (1.48). This was mainly because the highest proportions of people who were very satisfied with their NSW NPWS park visit were those visiting as part of an overnight stay (64%), followed by those visiting as part of a regular routine (63%), then those visiting on a day trip (56%).

Not surprisingly, those who claimed that the only reason for taking the trip was to visit the NSW NPWS park had the highest mean satisfaction score of 1.57, with 65% of this group very satisfied with their visit (see Figure 8.7-7). Those claiming that the main reason for their visit was to visit the NSW NPWS park had only the equal third highest mean satisfaction score (1.49), with those claiming that it was one of the main reasons attaining the second highest means score (1.54). Again this is due to higher proportions of those who were very satisfied with their most recent park visit being those who also indicated that the park visit was one of the main reasons for their trip (60%) compared with 58% for those indicating that the park visit was the main reason for their trip/
Figure 8.7-6: Satisfaction with most recently visited NSW NPWS Park by Main Activity

<table>
<thead>
<tr>
<th>Year</th>
<th>Main Activity</th>
<th>Mean Satisfaction Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>Walking</td>
<td>1.43</td>
</tr>
<tr>
<td>2010</td>
<td>Walking</td>
<td>1.51</td>
</tr>
<tr>
<td>2012</td>
<td>Walking</td>
<td>1.54</td>
</tr>
<tr>
<td>2014</td>
<td>Walking</td>
<td>1.51</td>
</tr>
<tr>
<td>2016</td>
<td>Walking</td>
<td>1.58</td>
</tr>
<tr>
<td>2008</td>
<td>Water-Based Recreation</td>
<td>1.45</td>
</tr>
<tr>
<td>2010</td>
<td>Water-Based Recreation</td>
<td>1.57</td>
</tr>
<tr>
<td>2012</td>
<td>Water-Based Recreation</td>
<td>1.53</td>
</tr>
<tr>
<td>2014</td>
<td>Water-Based Recreation</td>
<td>1.56</td>
</tr>
<tr>
<td>2016</td>
<td>Water-Based Recreation</td>
<td>1.55</td>
</tr>
<tr>
<td>2008</td>
<td>Picnicking &amp; Dining</td>
<td>1.47</td>
</tr>
<tr>
<td>2010</td>
<td>Picnicking &amp; Dining</td>
<td>1.59</td>
</tr>
<tr>
<td>2012</td>
<td>Picnicking &amp; Dining</td>
<td>1.60</td>
</tr>
<tr>
<td>2014</td>
<td>Picnicking &amp; Dining</td>
<td>1.57</td>
</tr>
<tr>
<td>2016</td>
<td>Picnicking &amp; Dining</td>
<td>1.64</td>
</tr>
<tr>
<td>2008</td>
<td>Touring &amp; Sightseeing</td>
<td>1.39</td>
</tr>
<tr>
<td>2010</td>
<td>Touring &amp; Sightseeing</td>
<td>1.44</td>
</tr>
<tr>
<td>2012</td>
<td>Touring &amp; Sightseeing</td>
<td>1.49</td>
</tr>
<tr>
<td>2014</td>
<td>Touring &amp; Sightseeing</td>
<td>1.46</td>
</tr>
<tr>
<td>2016</td>
<td>Touring &amp; Sightseeing</td>
<td>1.45</td>
</tr>
</tbody>
</table>

Figure 8.7-7: Satisfaction with most recently visited NSW NPWS Park by Purpose and Reason for Visit (Waves 7-13) 2016

<table>
<thead>
<tr>
<th>Purpose of Visit</th>
<th>Reason for Visit</th>
<th>Mean Satisfaction Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part of a day trip</td>
<td>The only reason for your trip (100% of the trip intention)</td>
<td>1.48</td>
</tr>
<tr>
<td>Part of a regular daily, weekly or monthly routine</td>
<td>The main reason for your trip (75% of the trip intention)</td>
<td>1.52</td>
</tr>
<tr>
<td>Part of an overnight visit or multi-day trip</td>
<td>One of the main reasons for your trip (50% of the trip intention)</td>
<td>1.56</td>
</tr>
<tr>
<td>Some other reason for visit</td>
<td>A minor reason for your trip (25% of the trip intention)</td>
<td>1.8</td>
</tr>
<tr>
<td>The only reason for your trip (100% of the trip intention)</td>
<td>Not one of the reasons for your trip (0% of the trip intention)</td>
<td>1.21</td>
</tr>
</tbody>
</table>
9. APPENDIX - QUESTIONNAIRE

STARTTIME

IF LANDLINE PHONE NUMBER, ASK:

Good [Morning/ Afternoon/ Evening]. I'm (SAY NAME) from Roy Morgan Research. We are currently conducting a study on behalf of the NSW Office of Environment & Heritage 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 Research. We are currently conducting a study on behalf of the NSW Office of Environment & Heritage 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

IF NECESSARY SAY: Is now a good time or would it be more convenient if I made an appointment to speak to you at another time?

IF NECESSARY, MAKE AN APPOINTMENT.

IF ASK WHO THE CLIENT, SAY: We are conducting this research on behalf of the NSW Office of
Environment & Heritage.

IF RESPONDENT ASKS FOR MORE INFO ABOUT THIS PROJECT OR ROY MORGAN RESEARCH, say: If you would like any more information about this project or Roy Morgan Research, 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 Research's compliance with the Privacy Act, you can phone us on 1800 337 332 or access our privacy policy on our website www.roymorgan.com

IF NECESSARY: You can go to the website www.privacy.gov.au for further information.

1  CONTINUE
2  REFUSAL

IF REFUSAL/TERMINATION, ASK:

[Single]

REFQ. Before you go, can I ask you one short question? In the last 4 weeks, that is, SINCE [%DAY7] [%D7] [%M7], have you visited a park like a National Park in New South Wales?

IF RESPONDENT ASKS WHAT IS MEANT BY A PARK LIKE A NATIONAL PARK, SAY: I MEAN National Parks, State Conservation Areas, Nature Reserves, State Forests, or any other type of park, EXCLUDING local council parks. I DO NOT MEAN botanical gardens, zoos or wildlife parks.

☐☐

1  YES
2  NO
3  CAN'T SAY
4  REFUSED
5  HUNG UP BEFORE QUESTION COULD BE ASKED
6  ANSWERING MACHINE
7  UNOBTAINABLE

[Single]

REGION. COMPUTED FROM SAMPLE

☐☐

1  SYDNEY
2  REMAINDER NSW
3  ACT
4  MELBOURNE
IF LANDLINE PHONE NUMBER, ASK:

[Single]
QMPHONE. Do you personally have a mobile phone?

1 YES
2 NO
3 CAN'T SAY

IF CAN'T SAY IF HAVE A MOBILE PHONE (CODE 3 ON QMPHONE), SAY

Thank you for your time, but we need this information to continue with this survey.

REFQ WILL BE ASKED HERE

ENDIF

ENDIF

IF MOBILE PHONE NUMBER, ASK:

[Quantity] {Min: 800, Max: 9999, Default Value:9999}
QPCODE. What is the postcode where you live?
RECORD POSTCODE
IF DON'T KNOW OR CAN'T SAY, RECORD AS 9999.

IF DON'T KNOW OR CAN'T SAY POSTCODE (9999 ON QPCODE), SAY

Thank you for your time, but we need your postcode to continue with this survey.

REFQ WILL BE ASKED HERE

ENDIF

[Single]
QNEWREGION. POSTCODE RANGE REGION - COMPUTED FROM QPCODE

1 SYDNEY
2 REMAINDER NSW
3 ACT
4 MELBOURNE
5 REMAINDER VIC
6 BRISBANE
7 REMAINDER SOUTHERN QLD
8 OTHER REGION

IF FROM ANOTHER REGION (CODE 8 ON QNEWREGION), SAY:

Thank you for your time, but we need speak with people from specific regions of Australia.

REFQ WILL BE ASKED HERE

ENDIF

[Single]
QLLINE. Do live in a home that also has a landline telephone?

1 YES
2 NO
3 CAN'T SAY

IF CAN'T SAY IF HAVE A LANDLINE (CODE 3 ON QLLINE), SAY

Thank you for your time, but we need this information to continue with this survey.

REFQ WILL BE ASKED HERE

ENDIF

ENDIF

[Single]
REG. COMPUTED FROM QNEWREGION AND REGION FOR QUOTAS

1 SYDNEY
2 REMAINDER NSW
3 ACT
4 MELBOURNE
5 REMAINDER VIC
6 BRISBANE
7 REMAINDER SOUTHERN QLD

IF FROM ANOTHER REGION (CODE 8 ON QNEWREGION), SAY:
Thank you for your time, but we need to speak with people from specific regions of Australia.

**REFQ WILL BE ASKED HERE**

ENDIF

ENDIF

[Single]

REG. COMPUTED FROM QNEWREGION AND REGION FOR QUOTAS

1  SYDNEY
2  REMAINDER NSW
3  ACT
4  MELBOURNE
5  REMAINDER VIC
6  BRISBANE
7  REMAINDER SOUTHERN QLD

**ASK ALL FROM SPECIFIC REGIONS (CODES 1 TO 7 ON QNEWREGION)**

[Single]

QSEX. RECORD SEX OF RESPONDENT

1  MALE
2  FEMALE
Firstly, I'd like to ask you some questions about you and your household.

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

SEX BY AGE

1  Male 18-24
2  Male 25-34
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]?

 disputable
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 Research, 
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 Research, you can phone us on 1800 337 332

WILL INCREMENT QUOTAS, THIS IS A SHORT INTERVIEW

ENDIF

ASK ALL VISITED A PARK IN LAST 4 WEEKS (CODE 1 AT QPARK)

STARTTIMEQ1

[SINGLE] [SORT]

Q1. What is the NAME of the National Park, State Conservation Area, Nature Reserve, State Forest or other park you visited MOST RECENTLY in NEW SOUTH WALES in the past 4 weeks, that is, SINCE [%DAY7] [%D7] [%M7]?

Remember the park must be in NSW.

IF NECESSARY SAY: By parks I DO NOT MEAN botanical gardens, zoos, wildlife parks, or any local council parks.

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

1  ABBEY CREEK (CROWDY BAY)
MOUNT TOMAH BOTANIC GARDENS

9997 Fixed OTHER (SPECIFY)

9998 Fixed CAN'T SAY

* YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". *

ENDTIMEQ1

TIMING2 - Q1 (ENDTIMEQ1-STARTTIMEQ1)

IF A PARK NAME CAN BE EITHER A OEH MANAGED PARK OR SOME OTHER PARK (CODES 2001 TO 2049 ON Q1), ASK:

STARTTIMEQ1N1

ONLY OEH OR OTHER PARK FOR PARK NAMED WILL APPEAR IN Q1N1

[SINGLE]

Q1N1. #/Was that Boat Harbour Aquatic Reserve or Boat Harbour Tomaree/Was that /#201.#, or // #202.?

1021 BANYABBA NATURE RESERVE AND STATE CONSERVATION AREA

3690 MILLEWA STATE FOREST

9998 Fixed CAN'T SAY

ENDTIMEQ1N1

TIMING3 - Q1N1 (ENDTIMEQ1N1-STARTTIMEQ1N1)
ENDIF

IF CAN'T SAY PARK NAME (CODE 9998 AT Q1 OR Q1N1), ASK:

STARTTIMEQ2

[Multiple] {Spread:20 Sort}

Q2. Where was the park located? What town or suburb was it close to?

IF MENTIONS 2 TOWNS, PLEASE TYPE IN FIRST MENTION. IF UNSUCCESSFUL, PLEASE THEN TYPE IN SECOND MENTION. IF UNSUCCESSFUL, PLEASE SELECT 2ND MENTION AS OTHER SPECIFY AND CONTINUE HIGHLIGHT ALL MENTIONED

 wyposa

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

 wyposa
1  Abbey Creek (Crowdy Bay)

3852 Mount Tomah Botanic Gardens

9997 Fixed (DO NOT READ) OTHER (SPECIFY)
9998 Fixed (DO NOT READ) CAN'T SAY

* YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER".*

ENDIF

ENDTIMEQ2

TIMING4 - Q2 TO Q2B (ENDTIMEQ2-STARTTIMEQ2)

IF STILL CAN'T SAY PARK NAME (CODE 9997 OR 9998 AT Q2B), OR STILL CAN'T NOMINATE TOWN AND HAS NOT SPECIFIED A PARK NAME (CODE 998 AT Q2 AND NOT CODES 2001 TO 2047 AT Q1 OR CODE 997 AT Q2), ASK:

STARTTIMEQ3

[Single]

Q3. Was the park a National Park, a State Conservation Area or a Nature Reserve, or was it a State Forest or some other type of park?

1 NATIONAL PARK, STATE CONSERVATION AREA OR NATURE RESERVE
2 STATE FOREST OR SOME OTHER PARK
3 CAN'T SAY

ENDTIMEQ3

TIMING5 - Q3 (ENDTIMEQ3-STARTTIMEQ3)
ENDORSE

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:

Q1JB. Was the park located on the land that is part of the ACT known as Booderee National Park, next to the Jervis Bay Naval facility (HMAS Creswell) and village, Lake Windermere, the Botanic Gardens and the Wreck Bay Aboriginal Community OR was it the park that is near Huskisson, Vincentia, Hyams Beach, Erowal Bay, Calalla Bay, Calalla Beach or Culburra Beach known as Jervis Bay National Park? Please note that Booderee National Park used to be known as Jervis Bay National Park.

457 JERVIS BAY NATIONAL PARK
3070 BOODREEE NATIONAL PARK
9998 CAN'T SAY

ENDIF

IF TOWN IS VINCENTIA, HYAMS BEACH, EROWAL BAY (CODES 473 TO 475 ON Q2), CODE AS JERVIS BAY NATIONAL PARK ON Q1JB

ENDIF

IF PARK NAME OTHER (CODE 9997 AT Q1), ASK:

Q4. Where was the park located? What town or suburb was it close to?

1 ABBOTSBURY
### 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?

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>NATIONAL PARK, STATE CONSERVATION AREA OR NATURE RESERVE</td>
</tr>
<tr>
<td>2</td>
<td>STATE FOREST OR SOME OTHER PARK</td>
</tr>
<tr>
<td>3</td>
<td>CAN'T SAY</td>
</tr>
</tbody>
</table>

* YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". *

[Single]

### TIMING6 - Q4 (ENDTIMEQ4-STARTTIMEQ4)

**ENDIF**

IF MOST RECENT VISITED PARK IS OEH/ NSW 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]?

أسواق

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?

أسواق

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:

[Singal]
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/ NSW NPWS (CODES 1 TO 1070 OR 1400 TO 1499 ON Q1 OR CODE 1 ON Q3 OR Q3A) OR UNKNOWN (CODE 9997 ON Q2B OR CODE 997 ON Q2 OR CODE 3 ON Q3 OR Q3A OR CODE 9998 ON Q1N1), ASK:
STARTTIMEQ8

[Multiple] {Spread:10 }

Q8. What ACTIVITIES did you undertake during your MOST RECENT visit to
[%PARK_NAME]?
HIGHLIGHT ALL MENTIONED

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

1  ABORIGINAL HERITAGE APPRECIATION

67  WORKING
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

[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

FROM WAVE 7 ONWARDS

[Single]
QVISPART1. Was visiting this park … ?
READ OUT

1 Part of regular daily, weekly or monthly routine
2 Part of a day trip
3 Part of an 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**

<table>
<thead>
<tr>
<th>Code</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ABBEY CREEK (CROWDY BAY)</td>
</tr>
<tr>
<td>3852</td>
<td>MOUNT TOMAH BOTANIC GARDENS</td>
</tr>
<tr>
<td>9997</td>
<td>OTHER (SPECIFY)</td>
</tr>
<tr>
<td>9998</td>
<td>CAN'T SAY</td>
</tr>
<tr>
<td>9999</td>
<td>NONE/ NO OTHER PARK</td>
</tr>
</tbody>
</table>

* 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.**
Q10NA. #/Was that Boat Harbour Aquatic Reserve or Boat Harbour Tomaree/Was that/#201.#/,
or/#202.?

1021 BANYABBA NATURE RESERVE AND STATE CONSERVATION AREA

3690 MILLEWA STATE FOREST
9998 Fixed CAN’T SAY

ENDIF

IF CAN’T SAY PARK NAME (CODE 9998 AT Q10A. OR Q10NA.), ASK:

[Multiple] {Spread:10 Sort}

Q11AA. Where was the park located? What town or suburb was it close to?

IF MENTIONS 2 TOWNS, PLEASE TYPE IN FIRST MENTION. IF UNSUCCESSFUL,
PLEASE THEN TYPE IN SECOND MENTION. IF UNSUCCESSFUL, PLEASE SELECT
2ND MENTION AS OTHER SPECIFY AND CONTINUE
HIGHLIGHT ALL MENTIONED

1 ABBOTSBURY

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

* YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED “OTHER”. *

IF GAVE NAME OF SUBURB OR TOWN NOT JERVIS BAY (CODES 1 TO 217 OR 219
TO 472 OR 476 TO 489 ON Q11AA.) AND HAS NOT SPECIFIED A PARK NAME (NOT
CODES 2001 TO 2047 ON Q10A.), ASK:
ONLY PARKS FROM SUBURB OR TOWN MENTIONED IN Q11AA. WILL APPEAR IN Q11AB.

{Sort}

Q11AB. Would it have been...?
READ OUT

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

1 Abbey Creek (Crowdy Bay)

3852 MOUNT TOMAH BOTANIC GARDENS

9997 (DO NOT READ) OTHER (SPECIFY)

9998 (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:

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 BOODEREΕ NATIONAL PARK
9998 CAN'T SAY

ENDIF

IF TOWN IS VINCENTIA, HYAMS BEACH, EROWAL BAY (CODES 473 TO 475 ON Q11AA.), CODE AS JERVIS BAY NATIONAL PARK ON QAJB.

ENDIF

IF PARK NAME OTHER (CODE 9997 AT Q10A.), ASK:

[Single] {Sort}

Q13A. Where was the park located? What town or suburb was it close to?

1 ABBOTSBURY

489 SAMURI BEACH

997 Fixed Openend OTHER (SPECIFY)
**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?

\[
\begin{align*}
1 & \quad \text{NATIONAL PARK, STATE CONSERVATION AREA OR NATURE RESERVE} \\
2 & \quad \text{STATE FOREST OR SOME OTHER PARK} \\
3 & \quad \text{CAN'T SAY}
\end{align*}
\]

**IF MOST RECENT VISITED PARK IS OEH/ NSW 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:**

\[
\text{[Quantity]} \quad \text{[Min: 1, Max: 99, Default Value:99]}
\]

Q14A. How many times did you visit [%PARK_NAMEA] in the last 4 weeks, that is, SINCE [%DAY7] [%D7] [%M7]?

INTERVIEWER NOTE: RECORD CAN'T SAY/REFUSED AS 99

**IF NUMBER OF VISITS 10 OR MORE (>9 ON Q14A.), ASK:**

\[
\begin{align*}
\text{[Single]} \\
Q14AA. \text{ That's a large number of visits over the last 4 weeks, is } [%Q14A] \text{ visits correct?} \\
\text{IF NECESSARY, SAY}: \text{ That is, SINCE } [%DAY7] [%D7] [%M7]? \\
\begin{align*}
1 & \quad \text{YES - NUMBER OF VISITS CONFIRMED} \\
2 & \quad \text{NO - NUMBER TO BE AMENDED}
\end{align*}
\]

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
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

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:
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". *

FROM WAVE 7 ONWARDS

QVISPART2. Was visiting this park … ?
READ OUT

1 Part of regular daily, weekly or monthly routine

2 Part of a day trip

3 Part of an overnight visit or multi-day trip

4 (DO NOT READ) FOR SOME OTHER REASON

5 (DO NOT READ) CAN'T SAY

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 one 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)

3852. MOUNT TOMAH BOTANIC GARDENS

9997. OTHER (SPECIFY)

9998. CAN'T SAY

9999. 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 Opened OTHER (SPECIFY)
998 Fixed Single CAN'T SAY
* YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". *

IF GAVE NAME OF SUBURB OR TOWN NOT JERVIS BAY (CODES 1 TO 217 OR 219 TO 472 OR 476 TO 489 ON Q11BA.) AND HAS NOT SPECIFIED A PARK NAME (NOT CODES 2001 TO 2047 ON Q10B.), ASK:

ONLY PARKS FROM SUBURB OR TOWN MENTIONED IN Q11BA. WILL APPEAR IN Q11BB.

[Single] {Sort}

Q11BB. Would it have been...?
READ OUT

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

↓ ↑

1 Abbey Creek (Crowdy Bay)

↓ ↓

3852 MOUNT TOMAH BOTANIC GARDENS

9997 Fixed (DO NOT READ) OTHER (SPECIFY)

9998 Fixed (DO NOT READ) CAN'T SAY

* YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". *

ENDIF

IF STILL CAN'T SAY PARK NAME (CODE 9997 OR 9998 AT Q11BB.) OR STILL CAN'T NOMINATE TOWN AND HAS NOT SPECIFIED A PARK NAME (CODE 998 AT Q11BA. AND NOT CODES 2001 TO 2047 AT Q10B. OR CODE 997 AT Q11BA.), ASK:

[Single]

Q12B. Was the park a National Park, a State Conservation Area or a Nature Reserve, or was it a State Forest or some other type of park?

↓ ↑
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:

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

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:

Q13B. Where was the park located? What town or suburb was it close to?
<table>
<thead>
<tr>
<th>Code</th>
<th>Park Name</th>
<th>Visitation Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>489</td>
<td>SAMURI BEACH</td>
<td>997</td>
</tr>
<tr>
<td>997</td>
<td>OTHER (SPECIFY)</td>
<td>Fixed Openend</td>
</tr>
<tr>
<td>998</td>
<td>CAN'T SAY</td>
<td>Fixed Single</td>
</tr>
</tbody>
</table>

*YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER".*

**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?**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>NATIONAL PARK, STATE CONSERVATION AREA OR NATURE RESERVE</td>
</tr>
<tr>
<td>2</td>
<td>STATE FOREST OR SOME OTHER PARK</td>
</tr>
<tr>
<td>3</td>
<td>CAN'T SAY</td>
</tr>
</tbody>
</table>

ENDIF

**IF MOST RECENT VISITED PARK IS OEH/ NSW 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

[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 CAN'T SAY (CODES 2 OR 3 ON Q14BB.), SAY:

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". *

FROM WAVE 7 ONWARDS

QVISPART3. Was visiting this park … ? READ OUT

1  Part of regular daily, weekly or monthly routine
2  Part of a day trip
3  Part of an overnight visit or multi-day trip
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)

3852. MOUNT TOMAH BOTANIC GARDENS

9997. Fixed
Openend. OTHER (SPECIFY)

9998. Fixed. CAN'T SAY

9999. Fixed. NONE/ NO OTHER PARK

* YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". *

IF A PARK NAME CAN BE EITHER A OEH MANAGED PARK OR SOME OTHER PARK (CODES 2001 TO 2049 ON Q10C.), ASK:

ONLY OEH OR OTHER PARK FOR PARK NAMED WILL APPEAR IN Q10NC.

[Single] {Sort}

Q10NC. #/Was that Boat Harbour Aquatic Reserve or Boat Harbour Tomaree/Was that /#201.#/, or /#202.? 

1021. BANYABBA NATURE RESERVE AND STATE CONSERVATION AREA

3690. MILLEWA STATE FOREST

9998. Fixed. CAN'T SAY

ENDIF

IF CAN'T SAY PARK NAME (CODE 9998 AT Q10C. OR Q10NC.), ASK:

[Multiple] {Spread:10 Sort}
Q11CA. Where was the park located? What town or suburb was it close to?

IF MENTIONS 2 TOWNS, PLEASE TYPE IN FIRST MENTION. IF UNSUCCESSFUL, PLEASE THEN TYPE IN SECOND MENTION. IF UNSUCCESSFUL, PLEASE SELECT 2ND MENTION AS OTHER SPECIFY AND CONTINUE
HIGHLIGHT ALL MENTIONED

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ABBOTSBURY</td>
</tr>
</tbody>
</table>

489 SAMURI BEACH

997 Fixed Openend OTHER (SPECIFY)

998 Fixed Single CAN'T SAY

* YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER".*

IF GAVE NAME OF SUBURB OR TOWN NOT JERVIS BAY (CODES 1 TO 217 OR 219 TO 472 OR 476 TO 489 ON Q11CA.) AND HAS NOT SPECIFIED A PARK NAME (NOT CODES 2001 TO 2047 ON Q10C.), ASK:

**ONLY PARKS FROM SUBURB OR TOWN MENTIONED IN Q11CA. WILL APPEAR IN Q11CB.**

[Single] {Sort}

Q11CB. Would it have been...?
READ OUT
IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Abbey Creek (Crowdy Bay)</td>
</tr>
</tbody>
</table>

3852 MOUNT TOMAH BOTANIC GARDENS

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

9998 Fixed (DO NOT READ) CAN'T SAY
* YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". *

ENDIF

IF STILL CAN'T SAY PARK NAME (CODE 9997 OR 9998 AT Q11CB.) OR STILL CAN'T NOMINATE TOWN AND HAS NOT SPECIFIED A PARK NAME (CODE 998 AT Q11CA. AND NOT CODES 2001 TO 2047 AT Q10C. OR CODE 997 AT Q11CA.), ASK:

[Single]

Q12C. Was the park a National Park, a State Conservation Area or a Nature Reserve, or was it a State Forest or some other type of park?

1 NATIONAL PARK, STATE CONSERVATION AREA OR NATURE RESERVE
2 STATE FOREST OR SOME OTHER PARK
3 CAN'T SAY

ENDIF

ENDIF

IF PARK OR TOWN MENTIONED IS JERVIS BAY (CODE 457 ON Q10C. OR CODE 218 ON Q11CA.) OR TOWN MENTIONED IS NOWRA OR ULLADULLA AND PARK IS JERVIS BAY (CODES 318 OR 408 ON Q11CA. AND CODE 457 ON Q11CB.), ASK:

[Single]

QCJB. Was the park located on the land that is part of the ACT known as Booderee National Park, next to the Jervis Bay Naval facility (HMAS Creswell) and village, Lake Windermere, the Botanic Gardens and the Wreck Bay Aboriginal Community OR was it the park that is near Huskisson, Vincentia, Hyams Beach, Erowal Bay, Calalla Bay, Calalla Beach or Culburra Beach known as Jervis Bay National Park? Please note that Booderee National Park used to be known as Jervis Bay National Park.

457 JERVIS BAY NATIONAL PARK
3070 BOODEERE NATIONAL PARK
9998 CAN'T SAY

ENDIF

IF TOWN IS VINCENTIA, HYAMS BEACH, EROWAL BAY (CODES 473 TO 475 ON Q11CA.), CODE AS JERVIS BAY NATIONAL PARK ON QCJB.

ENDIF

IF PARK NAME OTHER (CODE 9997 AT Q10C.), ASK:

[SINGLE] {SORT}

Q13C. Where was the park located? What town or suburb was it close to?

1 ABBOTSBURY

489 SAMURI BEACH

997 Fixed OTHER (SPECIFY)

998 Fixed CAN'T SAY

* YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER".*

[SINGLE]

Q12CA. Was the park a National Park, a State Conservation Area or a Nature Reserve, or was it a State Forest or some other type of park?

1 NATIONAL PARK, STATE CONSERVATION AREA OR NATURE RESERVE

2 STATE FOREST OR SOME OTHER PARK

3 CAN'T SAY

ENDIF
IF MOST RECENT VISITED PARK IS OEH/ NSW 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 CAN'T SAY (CODES 2 OR 3 ON Q14CB.), SAY:

[Multiple] {Spread:10}

Q14CC. Could you please explain why this estimated figure is not correct?

INTERVIEWER RECORD RESPONSES IN FULL

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

↓↑

97 Openend OTHER (SPECIFY)
98 Single CAN'T SAY

* YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". *

ENDIF
FROM WAVE 7 ONWARDS

[Single]
QVISPART4. Was visiting this park … ?
READ OUT

1 Part of regular daily, weekly or monthly routine
2 Part of a day trip
3 Part of an overnight visit or multi-day trip
4 (DO NOT READ) FOR SOME OTHER REASON
5 (DO NOT READ) CAN'T SAY

[Single]
QVISRESN4. Was visiting this park … ?
READ OUT

1 The only reason for your trip (100% of the trip purpose or intention)
2 The main reason for your trip (75% of the trip 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)

3852 MOUNT TOMAH BOTANIC GARDENS

9997 Fixed Openend OTHER (SPECIFY)

9998 Fixed CAN'T SAY

9999 Fixed NONE/ NO OTHER PARK

* YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". *

IF A PARK NAME CAN BE EITHER A OEH MANAGED PARK OR SOME OTHER PARK (CODES 2001 TO 2049 ON Q10D.), ASK:

ONLY OEH OR OTHER PARK FOR PARK NAMED WILL APPEAR IN Q10ND.

[Single] {Sort}

Q10ND. #/Was that Boat Harbour Aquatic Reserve or Boat Harbour Tomaree/Was that #201.#/, or //#202.?
BANYABBA NATURE RESERVE AND STATE CONSERVATION AREA

MILLEWA STATE FOREST

CAN'T SAY

IF CAN'T SAY PARK NAME (CODE 9998 AT Q10D. OR Q10ND.), ASK:

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

ABBOTSBURY

SAMURI BEACH

OTHER (SPECIFY)

CAN'T SAY

* YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". *

IF GAVE NAME OF SUBURB OR TOWN NOT JERVIS BAY (CODES 1 TO 217 OR 219 TO 472 OR 476 TO 489 ON Q11DA.) AND HAS NOT SPECIFIED A PARK NAME (NOT CODES 2001 TO 2047 ON Q10D.), ASK:

ONLY PARKS FROM SUBURB OR TOWN MENTIONED IN Q11DA. WILL APPEAR IN Q11DB.
Q11DB. Would it have been...?
READ OUT

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

1  Abbey Creek (Crowdy Bay)

3852  MOUNT TOMAH BOTANIC GARDENS

9997 Fixed (DO NOT READ) OTHER (SPECIFY)
9998 Fixed (DO NOT READ) CAN'T SAY

* YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". *

ENDIF

IF STILL CAN'T SAY PARK NAME (CODE 9997 OR 9998 AT Q11DB.) OR STILL CAN'T NOMINATE TOWN AND HAS NOT SPECIFIED A PARK NAME (CODE 998 AT Q11DA. AND NOT CODES 2001 TO 2047 AT Q10D. OR CODE 997 AT Q11DA.), ASK:

Q12D. Was the park a National Park, a State Conservation Area or a Nature Reserve, or was it a State Forest or some other type of park?

1  NATIONAL PARK, STATE CONSERVATION AREA OR NATURE RESERVE
2  STATE FOREST OR SOME OTHER PARK
3  CAN'T SAY

ENDIF

ENDIF
IF PARK OR TOWN MENTIONED IS JERVIS BAY (CODE 457 ON Q10D. OR CODE 218 ON Q11DA.) OR TOWN MENTIONED IS NOWRA OR ULLADULLA AND PARK IS JERVIS BAY (CODES 318 OR 408 ON Q11DA. AND CODE 457 ON Q11DB.), ASK:

[Single]

QDJB. Was the park located on the land that is part of the ACT known as Booderee National Park, next to the Jervis Bay Naval facility (HMAS Creswell) and village, Lake Windermere, the Botanic Gardens and the Wreck Bay Aboriginal Community OR was it the park that is near Huskisson, Vincentia, Hyams Beach, Erowal Bay, Calalla Bay, Calalla Beach or Culburra Beach known as Jervis Bay National Park? Please note that Booderee National Park used to be known as Jervis Bay National Park.

↓↓

457  JERVIS BAY NATIONAL PARK
3070  BOODEREE NATIONAL PARK
9998  CAN'T SAY

ENDIF

IF TOWN IS VINCENTIA, HYAMS BEACH, EROWAL BAY (CODES 473 TO 475 ON Q11DA.), CODE AS JERVIS BAY NATIONAL PARK ON QDJB.

ENDIF

IF PARK NAME OTHER (CODE 9997 AT Q10D.), ASK:

[Single] {Sort}

Q13D. Where was the park located? What town or suburb was it close to?

↓↓

1  ABBOTSBURY

↓

489  SAMURI BEACH

997  OTHER (SPECIFY)

998  CAN'T SAY
* YOU MUST ENTER TEXT INTO THE OPEN BOX IF YOU HAVE CODED "OTHER". *

[SINGLE]

Q12DA. Was the park a National Park, a State Conservation Area or a Nature Reserve, or was it a State Forest or some other type of park?

\[1\] NATIONAL PARK, STATE CONSERVATION AREA OR NATURE RESERVE

\[2\] STATE FOREST OR SOME OTHER PARK

\[3\] CAN'T SAY

ENDIF

IF MOST RECENT VISITED PARK IS OEH/ NSW NPWS (CODES 1 TO 1070 OR 1400 TO 1499 ON Q10D. OR CODE 1 ON Q12D. OR Q12DA.) OR UNKNOWN (CODE 9997 ON Q11DB. OR CODE 997 ON Q11DA. OR CODE 3 ON Q12D. OR Q12DA.), ASK:

[QUANTITY] {Min: 1, Max: 99, Default Value: 99}

Q14D. How many times did you visit [%PARK_NAMED] in the last 4 weeks, that is, SINCE [%DAY7] [%D7] [%M7]?

RECORD NUMBER

INTERVIEWER NOTE: RECORD CAN'T SAY/REFUSED AS 99

IF NUMBER OF VISITS 10 OR MORE (>9 ON Q14D.), ASK:

[SINGLE]

Q14DA. That's a large number of visits over the last 4 weeks, is [%Q14D] visits correct?

IF NECESSARY, SAY: That is, SINCE [%DAY7] [%D7] [%M7]?

\[1\] YES - NUMBER OF VISITS CONFIRMED

\[2\] NO - NUMBER TO BE AMENDED

IF NUMBER OF VISITS TO BE AMENDED (CODE 2 ON Q14DA.), WILL GO BACK TO Q14D.
ENDIF

ENDIF

IF ONE VISIT ONLY (Q14D.=1), ASK:

[Quantity] {Min: 0, Max: 99, Default Value:99}

Q15D. How many children under 18 IN TOTAL visited [%PARK_NAMED] with you on this visit?
RECORD NUMBER

INTERVIEWER NOTE: RECORD NO CHILDREN AS 0. RECORD CAN'T SAY/ REFUSED AS 99

IF NUMBER OF CHILDREN 5 OR MORE (Q15D.>4), ASK:

[SINGLE]

Q15DA. That's a large number of children, is [%Q15D] correct?

☐ ☐

1 YES - NUMBER OF CHILDREN CONFIRMED
2 NO - NUMBER TO BE AMENDED

IF NUMBER OF CHILDREN TO BE AMENDED (CODE 2 ON Q15DA.), WILL GO BACK TO Q15D.

ENDIF

ENDIF

IF NUMBER OF CHILDREN IN VISIT IS GREATER THAN NUMBER OF CHILDREN IN HOUSEHOLD (Q15D. > QCHILDREN), ASK:

[MULTIPLE]

Q15DB. On this visit, were the extra children that don't usually live in your household either...?
READ OUT
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
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

[Spread:10]

1 Single Under Your Care Or The Care Of Another Adult Who Lives In Your Household
2 Single OR Were They In The Care Of An Adult That Doesn't Live In Your Household
3 Single (DO NOT READ) CAN'T SAY

ENDIF

ENDIF

[Quantity] {Min: 0, Max: 999}

DUMMY VARIABLE COMPUTED - Q14D.*Q15D. OR Q14D.*Q16D.

IF Q14D. x (Q15D. OR Q16D.) > 28, SAY:

[Single]

Q14DB. To calculate the number of children in your party that visited this park in the last 4 weeks we multiply the number of visits YOU made to this park by the number of children that visited with you on YOUR MOST RECENT VISIT. We calculate this to be [%DQ14D] child visits in total over the last 4 weeks. Would this be approximately correct?

[Spread:10]

1 YES
2 NO
3 CAN'T SAY

IF NO OR CAN'T 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". *

FROM WAVE 7 ONWARDS

[Single]

QVISPART5. Was visiting this park … ?
READ OUT

1  Part of regular daily, weekly or monthly routine
2  Part of a day trip
3  Part of an 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)
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)

Not one of the reasons for your trip (0% of the trip purpose or intention)

(DO NOT READ) CAN’T SAY

ENDIF

ENDTIMEQ10D

TIMING14 - Q10D TO Q16DB (ENDTIMEQ10D-STARTTIMEQ10D)

ENDIF

DEMOGRAPHICS

FROM WAVE 11 ONWARDS
ASK IF REGION OR QNEWREGION IS NSW OR ACT (CODES 1-3):

[Single]

QTAG. Since October 2016, do you recall seeing or hearing any advertising which uses the slogan or tag line “Answer the Call”?

1 YES
2 NO
3 CAN’T SAY

[Single]

IF RECALL ADVERTISING (CODE 1 ON QTAG):

QBRAND. Who was the slogan or tag line “Answer the Call for?”
[Multiple]

QMedia. Here to you recall seeing or hearing this advertising?

1. RADIO/PODCASTS/LIVE STREAMING
2. PRINT NEWSPAPERS/MAGAZINES ETC.
3. ONLINE WEBSITES
4. ON SOCIAL MEDIA (E.G. FACEBOOK)
5. POSTERS/BILLBOARDS (OUTDOOR MEDIA)
6. OTHER MEDIA
7. CAN’T SAY/CANT RECALL

ENDIF

[SINGLE]

QTALK. Since October 2016, have you seen or heard any of your favourite online publishers, websites or social networks talking about nature and National Parks?

1. YES
2. NO
3. CAN’T SAY

ENDIF
ASK EVERYONE

Finally a few more questions about you and your household.

STARTTIMEQ17

[Multiple]

Q17. Which languages are USUALLY spoken in the household?

1   ENGLISH
2   ITALIAN
3   GREEK
4   CANTONESE
5   MANDARIN
6   ARABIC
7   VIETNAMESE
8   GERMAN
9   SPANISH
10  HINDI
11  TAGALOG (FILIPINO)
12  ABORIGINAL/INDIGENOUS LANGUAGE
97  Openend OTHER (SPECIFY)
98  Single CAN'T SAY/REFUSED

[SINGLE]

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

1   PRIMARY SCHOOL
2   SOME SECONDARY SCHOOL
3   SOME TECHNICAL OR COMMERCIAL
4   PASSED 4TH FORM/ YEAR 10
5   PASSED 5TH FORM/ YEAR 11/ LEAVING
6  FINISHED TECHNICAL SCHOOL, COMMERCIAL COLLEGE OR TAFE
7  FINISHED/ NOW STUDYING H.S.C./ V.C.E./ YEAR 12
8  DIPLOMA FROM C.A.E.
9  SOME UNIVERSITY/ C.A.E.
10 DEGREE FROM UNIVERSITY OR CAE
11 POST GRADUATE QUALIFICATION

[Single]

Q19. Are you now in paid employment?

IF YES, ASK: Is that full-time for 35 hours or more a week, or part-time?

عاش
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?

عاش
1  LOOKING FOR FULL-TIME
2  LOOKING FOR PART-TIME
3  RETIRED
4  STUDENT
5  NON-WORKER
6  HOME DUTIES

ENDIF

ASK EVERYONE
Q20. Are you married, separated, divorced, widowed, de facto, engaged, planning to marry or single?

1  MARRIED
2  SEPARATED
3  DIVORCED
4  WIDOWED
5  DE FACTO
6  ENGAGED
7  PLANNING TO MARRY
8  SINGLE

IF CHILDREN LIVE IN HOUSEHOLD (QCHILDREN>0), ASK:

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

Q22. RESPONDENT LIFECYCLE - COMPUTED FROM QAGE, QCHILDREN, Q20 AND Q21

1  Single 18-34 No Children
2  Single 18-34 Children
3  Single 35+ No Children
4  Single 35+ Children
5  Married 18-34 No Children
6  Married 18-34 Children
FROM WAVE 11 – ASK EVERYONE

[SINGLE]
QHHINCPV1. What is the approximate ANNUAL INCOME of your household (i.e. all income earned before any expenses, including tax, are deducted)?

[Single]
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?

[Single]
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 Research, you can phone us on 1800 337 332

ENDTIMEQ17

TIMING15 - Q17 TO END (ENDTIMEQ17-STARTTIMEQ17)

END-OF-QUESTIONNAIRE

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