



Tohu Whenua Monitoring Survey 2022-2023 Report

A project conducted in partnership between Tohu Whenua and the Department of Conservation Te Papa Atawhai

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1 TOHU WHENUA MONITORING AT A GLANCE

1.1 PROGRAMME AND RESEARCH INTRODUCTION

Tohu Whenua is a growing network of heritage places around Aotearoa New Zealand that offer a visitor experience.¹ The programme sets out to connect New Zealanders with their heritage and enhance their sense of national identity by promoting significant historical and cultural stories. The branded programme has been rolled out in three regions (Te Tai Tokerau Northland, Te Tai Poutini West Coast and Otago) – with plans to expand nationwide. To date, minimal monitoring and research relating to Tohu Whenua had been undertaken.

This document provides visitors' experiences at Tohu Whenua sites. It includes data and information from customer research undertaken by Research First, a New Zealand market research and commercial insights agency, from January 2022 to April 2023.

The aim of this research was to strengthen the understanding of visitor's preferences, motivations, travel behaviour and storytelling. The research findings provide insights into how New Zealanders and international tourists visit Tohu Whenua.

Research First used a mixed method approach for this research. There were 1,440 responses, consisting of face-to-face full on-the-day interviewing (n=1,003), face-to-face recruit to online (n=63) and posters and advertising to recruit to an online survey (n=374).

1.2 PROGRAMME GOALS AND PROGRESS TOWARDS THEM

Exceptional experience

'Experiences that are stimulating, emotionally engaging and memorable for visitors of all ages and backgrounds' is one of the programme's goals. This is measured by understanding how satisfied visitors are, their perceptions of benefits, their propensity to visit and to recommend sites to other visitors.

Visitors were asked, how satisfied they were with their experience. Most (88%) visitors reported being either very or extremely satisfied. An extremely low proportion (1.2%) of visitors reported being either not at all or slightly satisfied.

1 The programme is a partnership between Manatū Taonga Ministry for Culture and Heritage, Department of Conservation Te Papa Atawhai and Heritage New Zealand Pouhere Taonga, with support from Ministry of Business, Innovation and Employment Hīkina Whakatutuki and Te Puni Kōkiri Ministry of Māori Development.

Most visitors reported being very or extremely satisfied

How satisfied they were with their experience



Visitors were asked how likely (on a scale of 0 to 10) it is they would visit another Tohu Whenua site in the next 12 months.²

- Sixty-five percent of visitors rated 8-10 that they would visit another Tohu Whenua site in the same region in the next 12 months.
- Sixty-three percent of visitors rated 8-10 that they would visit another Tohu Whenua site elsewhere in New Zealand in the next 12 months.

Visitors were asked how likely (on a scale of 0 to 10) it is they would recommend the site visited to their whānau and friends. Below are the proportion of detractors, passives and promoters. The net promoter score for Tohu Whenua is 58 (67 minus 9).

The Tohu Whenua programme has a great NPS score of 58

How likely visitors would recommend site to whānau and friends

	67%		25%	9%
Promotors (9 or 10)	Passives (7 or 8)	Detractors (0-6)		

While fifty-eight is a very high net promotor score, continuously improving the visitor experience could lift the net promoter score even higher.

2 This indicator has changed slightly from that outlined in the monitoring and evaluation plan (the percentage of visitors intending to visit another Tohu Whenua site in the next 12 months). The change recognises the partial regional rollout of the programme across New Zealand; not all New Zealanders will have the same opportunity.

Compelling brand

'A brand that is well known, highly respected and effective in drawing visitors to the sites involved' is one of the programme's goals. The survey offered an opportunity to understand the level of brand awareness among visitors to Tohu Whenua sites.

Visitors were asked at what, if any, point have they seen or heard about Tohu Whenua. Most visitors (60%) had not seen or heard of Tohu Whenua. There is room to grow the Tohu Whenua brand, so visitors are aware of places that have shaped New Zealand.

Most visitors had not heard of or seen Tohu Whenua

At what point, if any, visitors seen or heard of Tohu Whenua



While not an indicator of whether the Tohu Whenua brand is compelling, it is useful to understand how visitors are drawn to Tohu Whenua sites. Most common sources, whānau and friends (43%) and signs/passing by (23%), were by far the most effective current channels.

Visitors were asked how important a handful of factors were in their decision to visit. Of the nine factors listed, learning more about the region was considered very or extremely important by around half of visitors (52%). Other important factors include learning about a subject of interest; paying respects to the past; or whether there was low or no cost of entry.

Learning about a region and subject is important to visitors

Visitors who consider statements very or extremely important



Credible and connected network

'A network of visitor-ready sites that, together, tell the defining stories of Aotearoa New Zealand' is one of the programme's goals. This is measured via different sources, including a visitor perspective.

Most visitors feel site is important to know New Zealand's history

Visitors who agree the site is important to the understanding of New Zealnd's history



Visitors were asked, when thinking about their experience at [site] how much they agree with the statement 'this site is important to understanding of New Zealand's history.' Most visitors (83%) either agreed a lot or totally with the statement.

2 SURVEY BACKGROUND

2.1 INTRODUCTION TO PROGRAMME

Tohu Whenua is a growing network of heritage places around Aotearoa that offer a visitor experience. These places tell defining stories of our country. The programme sets out to connect New Zealanders with their heritage and enhance their sense of national identity by promoting significant historical and cultural stories. To date the branded programme has been rolled out in three regions (Te Tai Tokerau Northland, Te Tai Poutini West Coast and Otago), across 26 sites, but with plans to expand nationwide in the future.

The Tohu Whenua programme is a partnership between Manatū Taonga Ministry for Culture and Heritage, Department of Conservation Te Papa Atawhai (DOC) and Heritage New Zealand Pouhere Taonga (HNZPT), with support from Ministry of Business, Innovation and Employment Hīkina Whakatutuki and Te Puni Kōkiri Ministry of Māori Development.

Sites included in Tohu Whenua may be owned or (co-)managed by Crown entities or privately, so long as they meet the programme's criteria, which in summary are as follows:

- Significant to Aotearoa New Zealand
- High quality visitor experiences
- Supported by iwi and community
- Accessible sites presented well in partnership with willing owners.

DOC currently (co-)manages 12 Tohu Whenua sites, but these are essentially a subset of DOC's 50 Icon Sites. The other sites are managed by HNZPT or privately.

The Tohu Whenua strategic plan identifies five goals for the programme: branding, a connected network, exceptional visitor experiences, supportive communities, and effective management/governance.³

2.2 JOINT RESEARCH NEED

To date, minimal monitoring and research relating to Tohu Whenua has been undertaken. The programme and its partners commissioned a visitor survey delivering on monitoring requirements, informed by the Tohu Whenua Monitoring and Evaluation Plan⁴ and DOC's Outcomes Monitoring Framework.⁵

2.3 RESEARCH OBJECTIVES/PURPOSE

With an increasing lens on cultural heritage, it is critical that Tohu Whenua and its partners establish a greater understanding of Aotearoa New Zealand's most prominent cultural heritage offerings.

The aim was to survey current visitors with areas of interest. This includes preferences, motivations, travel behaviour and storytelling.

4 Tohu Whenua's Monitoring and Evaluation Plan was developed in 2020 and proposes a series of measures and supporting indicators by which to evaluate progress towards it's strategic goals – brand, network, visitor, community and programme management.

5 DOC's Outcomes Monitoring Framework Intermediate Outcome 2 is our history is brought to life and protected. Outcome objectives include protection, conservation, and maintenance of historic and cultural heritage; visitor experience and demand; communications and marketing; and partnerships.

3 RESEARCH METHOD

3.1 RESEARCH DESIGN

This research used a mixed method approach, which provided the most complete and representative sample in a cost-effective way. The approach minimises sampling and non-response error by providing a more complete sample frame. There were three methods used:

- Face-to-face full on-the-day interviewing this method provided the ability to set quotas for achieving interviews at each site. It was efficient at locations with high visitor numbers. This method has higher cost than other elements where visitor numbers are low and has an impact on the visitor experience.
- Face-to-face recruit to online this method increased potential sample size compared with just full surveying on site. This method has low impact on the visitor experience.
- Posters and advertising to recruit to an online survey low-cost way to extend the reach of the survey throughout the data collection period. This method relies on self-selection to take part so has a higher non-response bias.

3.2 SAMPLE DESIGN

The sample frame is defined as visitors who went to a Tohu Whenua site on the same day as field interviewers; or scanned a survey poster's QR code at a site. The sample frame excluded visitors participating in face-to-face surveys if they were under eighteen or those working on site.⁶

The face-to-face methods used a random sampling technique. An interval number was set to reflect people at a site on a given day. Interviewers then intercepted e.g., every second visitor, every fifth visitor or every tenth visitor.

Original completion targets were 3,615 responses across the Tohu Whenua network. This was based on historical visitor number estimates to individual sites. However, targets were revised (1,500) due to the impact that COVID-19 and weather events had on actual visitor numbers during fieldwork. The project commenced in January 2022, but was paused in February due to low visitor numbers as a result of COVID-19 and adverse weather conditions, including a state of emergency on the West Coast. Fieldwork restarted in January 2023, and was completed in April 2023. The rate of interviews peaked in January 2023, due to the large number of fieldwork hours occurring during this period.

Overall, there were n=1,440 responses. Below are responses by each method:

- Face-to-face full on-the-day interviewing (n=1,003) 1,003 visitors completed the survey with fieldwork staff.
- Face-to-face recruit to online (n= 63) 181 visitors requested to complete the survey online. Of the 181 email surveys sent, there were sixty-three responses. There were forty-three competed surveys, a completion rate of 24%.
- Posters and additional advertising to recruit to an online survey (n=374) 2,180 visitors scanned the QR code displayed on posters and started the survey. 374 visitors completed the survey, a completion rate of 17%.

3.3 DATA COLLECTION METHODS

All surveys and intercepts were captured using Voxco to ensure efficiency by using one centralised database across all survey channels:

- On-site data collection Research First conducted staff training for field interviews online. Posters were mailed to every site. DOC/Tohu Whenua communicated with all sites, providing instructions for display.
- Follow-up online data collection visitors were provided with options of completing the survey onsite, completion later via email, or declining to participate. Email invitations with survey links were sent following site visit. Reminders were sent to those who had not yet participated.
- QR code poster data collection posters were mailed to every site to be placed in a good location with foot traffic. Each poster had a QR code that when scanned would take visitors to the survey.

3.4 DATA RELIABILITY

Data was exported and imported into SPSS where it was cleaned and formatted. This process included checking for accuracy, removing unneeded variables, and standardising variables. Code frames were generated based on grouping together common answers to verbatim (text) answers given by respondents.

⁶ Additionally, those who worked for the Department of Conservation (if on a DOC site) or Heritage New Zealand Pouhere Taonga (if a on a Heritage New Zealand Pouhere Taonga site) were excluded. Those there not for leisure purposes at Hokitika site only were also excluded.

3.5 LIMITATIONS

Five sites (Clendon House, Māngungu Mission, Otago Central Rail Trail, Ruapekapeka Pā and Te Waimate Mission) had a low base sample size (n= <30). Data from these individual sites should be used for indicative purposes only. Because of the underrepresentation of these five sites, and overrepresentation of Arrowtown, the achieved dataset does not match quota profiles put in place for this research. When looking at an individual site, responses are representative.

The pause in data collection caused by COVID-19, poor weather and low visitor numbers allowed a review of survey performance. Some improvements were implemented:

- The demographic section was moved from the start to the end of the survey. This made the survey more engaging from the outset and decreased dropout rates.
- Poster locations were evaluated based on survey completions.
- Fieldwork conducted before the pause highlighted the need for back up plans and adaptable staff in each location.

Other learnings were identified after completing data collection. Including:

- The start and stop nature of research (caused by COVID-19 and poor weather) meant project management time increased. The pause allowed changes to the questionnaire that increased engagement, but increased time needed at the end of fieldwork.
- Certain posters performed much better because they had been placed in an area with higher foot traffic. Ensuring a better understanding of the implications for the overall survey if the posters are not displayed prominently should be a priority in future communications.
- A cost-effective way to increase the sample frame can be achieved by gaining access to existing databases held by the client where they exist. This was not feasible for this project as no visitor databases exist but could be considered at the set-up stage of future projects.

4 RESULTS - TOHU WHENUA PROGRAMME GOALS

In September 2020, Angus and Associates developed a plan for monitoring and evaluating progress towards goals outlined in Tohu Whenua's Five-Year Strategic Plan 2020-25.

The monitoring and evaluation is based on the programme's goals – brand, network, visitor, community and programme. Several data sources are identified about how progress should be measured. The Tohu Whenua visitor surveys across 2022-23 provide some of the programme's indicators. These are reported on in following sub-sections, along with other complementary information.

4.1 EXCEPTIONAL EXPERIENCE

'Experiences that are stimulating, emotionally engaging and memorable for visitors of all ages and backgrounds' is one of the programme's goals. This is measured by understanding how satisfied visitors are, their perceptions of benefits, their propensity to visit and to recommend sites to other visitors.

Visitors were asked how satisfied they were with their experience. Most (88%) visitors reported being either very or extremely satisfied. An extremely low proportion (1.2%) of visitors reported being either not at all or slightly satisfied.

Most visitors reported being very or extremely satisfied

How satisfied they were with their experience



Visitors were asked to rate (on a scale of 1-5) how satisfied they were with a range of experience features at [site]. Highest average satisfaction scores were for authenticity of the site (4.5), preservation of the site and heritage features (4.5) and maintenance/presentation of the site (4.5). Opportunity for interactivity (3.5), wayfinding and directional signage (3.9) and condition/ cleanliness of toilets (4.1) had the lowest average satisfaction. Open-ended responses to questions within the survey provide insight into why visitors may or may not be satisfied.

Visitors were asked what one thing they would remember most about their experience of history and heritage at [site]. Common themes were information (15%), scenery/landscape (10%), and history (9%). Following are some representative quotes.

"How incredible it must have been for the first waka to land here." (Cape Brett / Rākaumangamanga, February 2023)

"The difference between the treaties and the trouble this has caused." (Waitangi Treaty Grounds, January 2023)

"How Māori were treated by Europeans."

(Waitangi Treaty Grounds, January 2023)

"How hard the miners worked is so fascinating, they came through without family for years just to provide so inspiring." (Otago Central Rail Trail, January 2023)

"The stories shared on the tour." (Pompallier Mission and Printery, January 2023)

"Learning more about people and where they went and their connection to places and connections between people." (Totara Estate, March 2023).

Finally, visitors were asked about how the [site's] history and heritage experience could be improved. Common improvement themes were nothing (26%), more relevant information (12%), more improved signage (9%), and increase/fix facilities (7%). Following are some representative quotes:

"Don't change anything, keep it as is, and original." (Waiuta, January 2023)

"Including more Māori in the heritage side of the site. It just goes straight into the colonised buildings with no Māori included or any stories to tell why it is like this." (Kororipo Heritage Park, January 2023)

"A humanitarian element i.e., a human giving a tour or audio video for one depth." (Ruapekapeka Pā, February 2023)

"Sound tours, increase audio experience. More information about Māori history and who mana whenua are now." (Totara Estate, January 2023) *"Locals, or someone with experience to be there to talk to and ask questions."* (Arrowtown, January 2023)

Perception of benefit

Visitors were asked, when thinking about their experience, how much they agree with the statement 'I have a greater understanding of New Zealand as a result of visiting.'⁷ Most (70%) visitors either agreed a lot or totally with the statement. A low proportion (11%) of visitors either agree slightly or do not agree at all.

Most visitors agree they have a greater understanding of New Zealand following their visit

I have a greater understanding of New Zealand as a result of visiting



⁷ This indicator has changed slightly from that proposed in the monitoring and evaluation plan (the percentage of visitors that agree that their experience has given them a greater understanding of their culture). During survey development stakeholders discussed that culture was only one aspect, while for some sites international visitors would also have a presence.

Visitors were asked about other benefits, including feeling (physically) safe at all times; [site] is suitable for children; valuing New Zealand's heritage more; and having the opportunity to hear/read stories from iwi, hapū and whānau.

Most visitors felt safe, fewer had opportunities to learn from Māori

Visitors who agree a lot or totally with statements



Most visitors always felt physically safe during their visit. Ninety-four percent of visitors either agreed a lot or totally with the statement that they always felt physically safe.

Fewer visitors had the opportunity to learn from Māori. Forty-two percent of visitors agreed slightly or not at all that they could hear/read stories from iwi, hapū and whānau. There is considerable scope for more opportunities for visitors to learn from whānau, hapū and iwi at Tohu Whenua.

Propensity to visit

Visitors were asked how likely (on a scale of 0 to 10, where 0 is very unlikely and 10 is very likely) it is they would visit another Tohu Whenua site in the next 12 months.⁸

- Sixty-five percent of visitors rated 8-10 that they would visit another Tohu Whenua site in the same region in the next 12 months, with forty-eight percent very likely (rated 10).
- Sixty-three percent of visitors rated 8-10 that they would visit another Tohu Whenua site elsewhere in New Zealand in the next 12 months, with forty-six percent very likely (rated 10).

Visitors who live in regions where Tohu Whenua sites are located were more likely than non-residents to visit another Tohu Whenua site in the same region in the next 12 months (79% vs 63% - rated 8-10).

Advocacy

Visitors were asked how likely (on a scale of 0 to 10, where 0 is very unlikely and 10 is very likely) it is they would recommend [site] to their whānau and friends. Below are proportions of detractors (visitors who scored 0 to 6), passives (visitors who scored 7 or 8) and promoters (visitors who scored 9 or 10). The net promoter score (promoters minus detractors) for Tohu Whenua is 58 (67 minus 9).

The Tohu Whenua programme has a great NPS score of 58

How likely visitors would recommend site to whānau and friends



While fifty-eight is a very high net promotor score, continuously improving the visitor experience could lift the net promoter score even higher. Understanding the views of detractors and making improvements to the visitor experience could help turn detractors into promotors, advocating for Tohu Whenua.

4.2 COMPELLING BRAND

'A brand that is well known, highly respected and effective in drawing visitors to the sites involved' is one of the programme's goals. The survey offered an opportunity to understand the level of brand awareness among visitors to Tohu Whenua sites.⁹ The survey also provided an understanding of interest in learning more about Tohu Whenua.

⁸ This indicator has changed slightly from that outlined in the monitoring and evaluation plan (the percentage of visitors intending to visit another Tohu Whenua site in the next 12 months). The change recognises the partial regional rollout of the programme across New Zealand; not all New Zealanders will have the same opportunity.

⁹ This is not the official performance indicator as outlined in the monitoring and evaluation plan. The official indicator is the percentage of the New Zealand population that is aware of Tohu Whenua. Instead, this measure is included in a population survey of New Zealanders.

Tohu Whenua brand awareness among visitors

Visitors were asked at what, if any, point have they seen or heard about Tohu Whenua. Visitors could answer that they heard about Tohu Whenua before their visit, during their visit or they had never seen or heard about the brand. Most visitors (60%) had not seen or heard of Tohu Whenua.

Most visitors had not seen or heard of Tohu Whenua

At what point, if any, visitors seen or heard of Tohu Whenua



Whānau and friends are most important channel

How visitors learnt about a specific Tohu Whenua site



There is room to grow the Tohu Whenua brand, so visitors are aware of places that have shaped the country. This could lead to more visitors going to these landmarks and recommending these places to their whānau and friends.

While not an indicator of whether the Tohu Whenua brand is compelling, it is useful to understand how visitors are drawn to Tohu Whenua sites. Visitors were asked how they learnt about the specific site they visited. Multiple responses were possible across the range of channels. The most common sources, whānau and friends (43%) and signs/passing by (23%), were by far the most effective current channels. The former reinforces how exceptional visitor experiences create advocates for sites. Other reported on (above 5%) channels are shown below. Visitors were asked how important a handful of factors were in their decision to visit. Of the nine factors listed, learning more about the region was considered very or extremely important by around half of visitors (52%). Other important factors include learning about a subject of interest (for example, New Zealand Land Wars); paying respects to the past; or whether there was low or no cost of entry. Those aged 25-39 years of age were more likely to consider whether an experience is low, or no cost of entry very or extremely important (50% vs 37%).

Learning about a region and subjects is important to visitors

Visitors who consider statements very or extremely important



Interest in learning more about Tohu Whenua

Visitors were asked, when thinking about their experience at [site], how much do they agree with the statement 'want to learn more about Tohu Whenua.' Around half (47%) of visitors either agreed a lot or totally with the statement.

Just under half of visitors want to learn more about Tohu Whenua

Visitors who agree with wanting to learn more about Tohu Whenua



4.3 CREDIBLE AND CONNECTED NETWORK

'A network of visitor-ready sites that, together, tell the defining stories of Aotearoa New Zealand' is one of the programme's goals. This is measured via different sources, including a visitor perspective.

Visitors were asked, when thinking about their experience at [site] how much they agree with the statement 'this site is important to the understanding of New Zealand's history.'¹⁰ Most visitors (83%) either agreed a lot or totally with the statement.

Most visitors feel site is important to know New Zealand's history

Visitors who agree the site is important to the understanding of New Zealand's history



Visitors were asked, when thinking about their experience at [site] how much they agree with the statement 'story told at this site is connected to other important heritage sites around New Zealand.' Over two-thirds of visitors (73%) either agreed a lot or totally with this statement.

10 This indicator has changed slightly from that proposed in the monitoring and evaluation plan (the percentage of visitors who agree that Tohu Whenua tells the defining stories of Aotearoa/New Zealand). During survey development stakeholders recognised visitor perceptions would be most accurate in relation to the site visited (they may not be familiar with Tohu Whenua itself). There were also concerns over the use of the word 'defining' and what it meant. A complimentary question was developed in relation to connectedness to other sites.

5 HERITAGE CONTRIBUTIONS TO THE WEALTH OF AOTEAROA NEW ZEALAND

The Living Standards Framework, developed by The Treasury – Te Tai Ōhanga, captures many things that matter for New Zealanders' wellbeing now and into the future. It is a framework that helps New Zealand to think about the impact of different policies and interventions.

It includes several domains that relate to New Zealander's individual and collective wellbeing. These domains contribute to the four categories of wealth of Aotearoa New Zealand. Culture underpins and influences every part of the framework.

The Treasury's Living Standards Framework



The Tohu Whenua Monitoring Survey is not a data source for the Living Standards Framework. Instead, it shows how the network of Tohu Whenua sites build the wealth of Aotearoa New Zealand.¹¹

5.1 SOCIAL COHESION

Cultural capability and belonging

This domain is about people having the language, knowledge, connection and sense of belonging necessary to take part in one's culture or cultures. It is about helping others grow their cultural capability and feel a sense of belonging.

Visitors were asked how important different factors were in their decision to visit. One of those factors was the importance of whakapapa and whānau connections to the site. Sixteen percent of visitors reported that whakapapa and whānau connections to the site was either very or extremely important. For Māori, the proportion who agreed was higher (35% vs 16%).¹²

Visitors were asked how important a handful of factors in their decision were to visit. One of those factors was paying respects to the past. Forty-seven percent reported that paying respect to the past was either very or extremely important. Section 4.1 shows just under half of visitors (49%) reported having the opportunity to hear/read stories from iwi, hapū and whānau. It also shows the network of Tohu Whenua sites contributes to a shared heritage, with many visitors (74%) reporting that they value New Zealand's heritage more as a result of their visit to a Tohu Whenua site (see page 9).

Repeat visits

Repeat visits indicate connection to a place. Visitors were asked including today how many visits in total have you ever made to [site]. Forty-two percent of visitors were repeat visitors (been to site two or more times), with seventeen percent of visitors having been five times or more.

Time spent

Free time and access to leisure are crucial components of a balanced lifestyle. Time spent is a measure of this. Visitors were asked how long their trip was to [site]. Visitors were provided with a range of durations. Around two in three visitors (65%) were at the Tohu Whenua site for under two hours.

11 No data in this report is a part of the LSF measurement dashboard, rather the framework has been chosen as way to represent the value the Tohu Whenua programme has to offer. The survey was not designed to reflect the wealth of Aotearoa New Zealand, but rather on the Tohu Whenua programme goals; gaps will be evident.

12 Due to low sample sizes for this question, no significant differences were able to be identified for this sub-question by ethnicity.

Two in three visitors were at Tohu Whenua for under two hours

Time spent at Tohu Whenua



Social cohesion

Positive social contact is a driver of both wellbeing and resilience. Visiting Tohu Whenua sites with other people contributes to these outcomes. Visitors were asked which category best describes your party/group. Multiple responses were possible. Most visitors (91%) were visiting with others. Seventy-four percent of visitors were with whānau. This consists of 39% of visitors who were with their partner and 37% of visitors who visited with family/whānau. Twenty-one percent of people visited with friends.

Composition of vistor groups



Inclusivity

The Living Standards Framework is about achieving outcomes for all New Zealanders, including socio-economic and physical impairment spectrums. Inclusivity is enabled through low-cost opportunities and access for people who are mobility impaired.

Visitors were asked how important a handful of factors were in their decision to visit. Two of those factors were low or no cost of entry and access for people who are mobility impaired. Thirty-seven percent reported that low or no cost of entry was either very or extremely important; while seventeen percent said the same about access for people who are mobility impaired.

Visitors were mixed in their view of whether cost was important

Low or no cost of entry is important when deciding to visit



5.2 HUMAN CAPABILITY

Human capability is about the continuing development of knowledge and skills. The survey shows that the network of Tohu Whenua sites contributes to this in many ways.

Greater understanding

Section 4.1 shows majority (70%) of visitors to Tohu Whenua sites report they agree totally or a lot that they have a greater understanding of New Zealand because of visiting [site] (see page 8). Some visitors (49%) also reported having the opportunity to hear/read stories from local iwi, hapū and whānau (see page 9).

Desire to learn more about heritage

The desire to learn can exist both pre- and post-visit. Visitors were asked how important a handful of factors were in their decision to visit. Two of those factors were to learn more about the region or leaning about a subject of interest. Around half (52%) of visitors reported that learning about a region was either very or extremely important. Half of visitors (50%) said the same about learning about a subject of interest.

Learning about a region is important for half of visitors

Learning more about region is important when deciding to visit

	16%	36%	31%	9%	<mark>4%</mark> 3%
	Extremely important	Very important	Moderately important		
I	Slightly important	Not at all important	Not applicable to my visit		

Learning about a subject is important for half of visitors

Learning more about subject of interest is important when deciding to visit



Visitors were asked, when thinking about their experience at [site], how much they agree with the statement 'I want to learn more about New Zealand's heritage'.¹³ Most visitors (77%) either agreed a lot or totally with the statements.

Most visitors want to learn more about New Zealand's heritage

Visitors who agree they want to learn more about New Zealand's heritage



Intergenerational learning

Aotearoa New Zealand is on a journey to ensure that all schools and kura learn how histories have shaped present day lives. In 2019, the government announced its plan for all schools and kura to instil in students an understanding of New Zealand history.

Visitors were asked how important a handful of factors in their decision were to visit. One of the factors was school curriculum changes. Under half (41%) of visitors did not think this factor was important at all when choosing where to visit. One in five visitors (19%) reported that school curriculum changes were either very or extremely important.

School curriculum changes were less important than other changes

How important school curriculum changes are when choosing where to visit



Section 4.1 shows many (78%) visitors to Tohu Whenua sites report the [site] was suitable for children (see page 9).

Visitors were also asked how likely (on a scale of 0 to 10, where 0 is very unlikely and 10 is very likely) they would share what they learnt from their visit with tamariki. The average score was 7.5 which is favourable.

5.3 FINANCIAL AND PHYSICAL CAPITAL

Visitors were asked a small number of questions relating to community/region economic benefits.

Primary purpose of travel

All visitors were asked whether visiting [site] was the primary/main purpose of their travel on the day of visit. Sixty-three percent of visitors were visiting [site] as their primary reason for travel on the day of their visit.

Number of nights spent in the region.

New Zealand visitors living outside of Tohu Whenua regions were asked how many nights in total do they intend to/did you spend away from home on this trip. Around one in three New Zealand visitors (33%) living outside of a Tohu Whenua region intend to visit for 5-10 days. Twenty-six percent of New Zealand visitors living outside of a Tohu Whenua region intend to visit for 3-4 days.

¹³ This indicator has changed slightly from that proposed in the monitoring and evaluation plan (the percentage of visitors who agree that Tohu Whenua tells the defining stories of Aotearoa/New Zealand). During survey development stakeholders recognised visitor perceptions would be most accurate in relation to the site visited (they may not be familiar with Tohu Whenua itself). There were also concerns over the use of the word 'defining' and what it meant. A complimentary question was developed in relation to connectedness to other sites.



6 CASE STUDIES

6.1 WAITANGI TREATY GROUNDS

The site of the signing of Te Tiriti o Waitangi, Waitangi Treaty Grounds marks our start as a bi-cultural nation, a Tohu Whenua. In total n=99 visitors completed the survey at the Waitangi Treaty Grounds. This is a small sample size; results should be treated as indicative only. They may not be representative of all visitors, or experiences.

Sample profile

- 51% of visitors to Waitangi Treaty Grounds live in New Zealand. This is significantly less than Tohu Whenua New Zealand visitors (67%). There were 49% of visitors who live overseas.
- 92% of visitors arrived with whānau, consisting of 55% with family and 40% with partners. Fewer visitors arrived with friends (9%).
- Of the New Zealand visitors, 80% of visitors were North Islanders, 42% were from Auckland.
- Of the New Zealand visitors, 68% were NZ European, 18% were Māori, 12% were other European, and 2% were Asian.
- 70% of visitors were first time visitors to Waitangi Treaty Grounds.
- Most visitors (97%) went to Waitangi Treaty Grounds for their primary/main purpose of travel for the specific day.

Marketing and branding

Visitors were asked how they learnt about Waitangi Treaty Grounds. They were presented with a range of channels. Multiple responses were possible. The most common sources were whānau and friends (62%) and school (37%). The former reinforces the importance of exceptional visitor experiences creating advocates for sites. The latter shows how interconnected the knowledge passed on in a school environment can correspond to people visiting places of importance. School (37%), magazines, newspapers and guidebooks (13%) and Trip Advisor/Lonely Planet (3%) were significantly higher than other sites, 5%, 6% and 0.4% respectively.

Visitor satisfaction and time spent

Visitors were asked how satisfied they were with their experience. Nearly all (99%) visitors reported being either very or extremely satisfied. No visitors reported being either not at all or slightly satisfied. The average satisfaction for Waitangi Treaty Grounds was 4.96, higher than the Tohu Whenua average of 4.4.

Visitors were asked how likely (on a scale of 0 to 10, where 0 is very unlikely and ten is very likely) it is they would recommend Waitangi Treaty Grounds to their whānau and friends. Two percent of visitors were detractors (visitors who scored 0 to 6), zero percent were passives (visitors who scored 7 or 8), and ninety-eight percent were promoters (visitors who scored 9 or 10). The net promoter score for Waitangi Treaty Grounds is 96 (98 minus 2) which is extremely high.

Visitors were asked how long they spent at Waitangi Treaty Grounds. Visitors were provided with a range of durations. Most visitors (81%) were at Waitangi Treaty Grounds for two to four hours.

Memorable experience

Visitors were asked what the one thing is they would remember most about their experience of history and heritage at Waitangi Treaty Grounds. Following are some representative quotes.

- "The different treaties and the manipulation" Canadian female, 50–54 years.
- *"Cultural performance"* Australian male, 30–34 years.
- *"The history of what happened here and how it is unresolved."* Bay of Plenty male, 50-54 years.
- "The difference between the treaties and the trouble this has caused."
- Auckland male, 40–44 years.

Visitor benefits

Visitors were asked, when thinking about their experience at Waitangi Treaty Grounds, how much they agree with statements. Most (over 80%) visitors agreed a lot or totally with feeling safe; the place being suitable for children; important for understanding New Zealand's history; greater understanding of New Zealand following visit; wanting to learn about New Zealand heritage; value New Zealand's heritage more and had the opportunity to hear/read stories from hapū and iwi.

Visitors to Waitangi Treaty Grounds were significantly more likely to agree a lot or totally with having a greater understanding of New Zealand as a result of visiting (96% vs 66%), value New Zealand's heritage more (87% vs 69%), opportunity to hear/read stories from iwi, hapū and whānau (85% vs 34%), that the site is important to understanding New Zealand's history (97% vs 78%), the site is suitable for children (97% vs 73%), and want to learn more about New Zealand's history (89% vs 74%).Visitors to Waitangi Treaty Grounds were significantly less likely to want to learn more about Tohu Whenua (17% vs 40%).

Visitors agreed (a lot or totally) with the following statements to the following degree at Waitangi Treaty Grounds



Experience improvements

Visitors were asked how the history and heritage experience at Waitangi Treaty Grounds could be improved. The vast majority (85%) of visitors suggested nothing. Comments about pricing were significantly higher than other Tohu Whenua sites. Visitors commented on adjusting the price of the experience.

"Price for international is too high..." – United Kingdom female 65-69 years. *"Should be cheaper for New Zealanders or free"* – United Kingdom female 60-64 years.



6.2 KORORIPO HERITAGE PARK

Kororipo is where Māori and Europeans lived side by side. Some of the most important early meetings between the two cultures took place here. In total n=100 visitors completed the survey at the Kororipo Heritage Park. This is a small sample size; results should be treated as indicative only. They are unlikely to be representative of all visitors.

Sample profile

- 79% of visitors to Kororipo Heritage Park live in New Zealand. This is significantly more than the overall Tohu Whenua New Zealand visitors (67%). There were 20% of visitors who live overseas.
- 84% of visitors arrived with whānau, consisting of 33% with partners and 51% with family.
- Of the New Zealand visitors, 90% of visitors were from the North Island, and 47% were from Northland.
- Of the New Zealand visitors, 72% were NZ European, 15% were other European, 10% were Māori, 6% were of MELAA (Middle Eastern, Latin American and African) ethnic groups, followed by 1% for both Asian and Pacific peoples.
- 37% of visitors were first time visitors to Kororipo Heritage Park.
- Visitors were more likely to be aged between 40-59 years (44% vs 31% overall).

Marketing and branding

Visitors were asked how they learnt about Kororipo Heritage Park. They were presented with a range of channels. Multiple responses were possible. The most effective common sources were whānau and friends (60%) and signs/passing by (39%).

Visitor satisfaction and time spent

Visitors were asked how satisfied they were with their experience. Most (94%) visitors reported being either very or extremely satisfied. No visitors reported being either not at all or slightly satisfied. The average satisfaction for Kororipo Heritage Park is 4.7, higher than the Tohu Whenua average of 4.4.

Visitors were asked how likely (on a scale of 0 to 10, where 0 is very unlikely and ten is very likely) it is they would recommend Kororipo Heritage Park to their whānau and friends. Four percent of visitors were detractors (visitors who scored 0 to 6), nine percent were passives (visitors who scored 7 or 8), and eighty-seven percent were promoters (visitors who scored 9 or 10). The net promoter score (promoters minus detractors) for Kororipo Heritage Park is 83 (87 minus 4) which is high.

Visitors were asked how long they spent at Kororipo Heritage Park. Visitors were provided with a range of durations. Most visitors (88%) were at Kororipo Heritage Park for under 2 hours. Around half of visitors (52%) visited Kororipo Heritage Park between one to two hours.

Memorable experience

Visitors were asked what one thing they would remember most about the history and heritage at Kororipo Heritage Park. Following are some representative quotes.

- "Beautiful scenery and feel of the place" Northland male 35-39 years
- "Being able to tell the history to my kids" Northland female 40-44 years
- "Historic buildings and the Pā" Canterbury female 30-34 years
- "Stone store" Auckland female 40-44 years

Visitor benefits

Visitors were asked, when thinking about their experience at Kororipo Heritage Park, how much they agree with statements. All (100%) visitors agreed a lot or totally with feeling safe at Kororipo Heritage Park, being significantly more likely to agree than other Tohu Whenua places (100% vs 92%).

Most (over 80%) visitors agreed a lot or totally with Kororipo Heritage Park being suitable for children, important for understanding New Zealand's history and providing quality time with whānau and friends.

Visitors to Kororipo Heritage Park were significantly more likely to agree totally or a lot that the site is important to the understanding New Zealand's history (90% vs 78%), the site is suitable for children (95% vs 73%), and that the story told at this site is connected to other important heritage sites around New Zealand (77% vs 61%).

Visitors to Kororipo Heritage Park were significantly less likely to want to learn more about Tohu Whenua (20% vs 40%).

Visitors agreed (a lot or totally) with the following statements to the following degree at Kororipo Heritage Park



Experience improvements

Visitors were asked how the history and heritage experience at Kororipo Heritage Park could be improved. Most (54%) visitors said nothing. Following are some representative quotes from visitors with suggested improvements.

"More detailed stories for those that want them. I have done a lot of my own research before coming here and feel there could be more stories available to those that want to read them." – Canterbury female 45-49 years.

"More QR codes. Kids' reading on phones as walking around the site" – United Kingdom male 70-74 years.

- "More Māori history being told at the location"
- Northland female 40-44 years.



6.3 DENNISTON MINE

Once a leading coal mining town, Denniston sits high on the edge of a steep incline railway once described as the eighth wonder of the world. A town of extremes, workers mined the highest quality coal, but families suffered low living conditions. In total n=82 visitors completed the survey at Denniston Mine. This is a small sample size; results should be treated as indicative only. They may not be representative of all visitors, or experiences.

Sample profile

- 91% of visitors live in New Zealand. This is significantly higher than the Tohu Whenua proportion (67%). There were 20% of visitors who live overseas.
- 67% of visitors arrived with whānau, consisting of 41% with partners and 28% with family.
- Of the New Zealand visitors, 53% of visitors were from the South Island.
- Of the New Zealand visitors, 91% were NZ European, 9% other European, 4% were Māori, 3% Asian, and 1% Pacific peoples.
- 63% of visitors were first time visitors to Denniston Mine.

Marketing and branding

Visitors were asked how they learnt about Denniston Mine. They were presented with a range of channels. Multiple responses were possible. The most common sources were whānau and friends (40%) and signs/passing by (15%). The former reinforces the importance of exceptional visitor experiences creating advocates for sites. The Denniston Rose (11%) was another important channel.¹⁴

Visitor satisfaction and time spent

Visitors were asked how satisfied they were with their experience. Most (81%) visitors reported being either very or extremely satisfied. No visitors reported being either not at all or slightly satisfied. The average satisfaction for Denniston Mine is 4.1, lower than the Tohu Whenua average of 4.4.

Visitors were asked how likely (on a scale of 0 to 10, where 0 is very unlikely and ten is very likely) it is they would recommend Denniston Mine to their whānau and friends. Six percent of visitors were detractors (visitors who scored 0 to 6), thirty-six percent were passives (visitors who scored 7 or 8), and fifty-seven percent were promoters (visitors who scored 9 or 10). The net promoter score (promoters minus detractors) for Denniston Mine is 51 (57 minus 6) which is lower than the Tohu Whenua average of 58.

Visitors were asked how long their trip was to Denniston Mine. Visitors were provided with a range of durations. Most visitors (80%) were at Denniston Mine for under 2 hours.

Memorable experience

Visitors were asked what the one thing is they will remember most about their experience of history and heritage at Denniston Mine. Following are some representative quotes.

"How hard it would be for the miners in those days." – Marlborough female 55-59 years

"Reality of being in this place brought the story Denniston alive." – Auckland male 80-84 years

"Comparison with the forestry industry and exploitation of the land"

- Hawke's Bay male 75-79 years
- "The gradient of the hill" Otago male under 18 years

14 The Denniston Rose series of historical novels written by Jenny Pattrick were published in 2003 and 2004 and are among New Zealand's highest selling novels.

Visitor benefits

Visitors were asked, when thinking about their experience at Denniston Mine, how much they agree with the statements below. Most (84%) visitors agreed a lot or totally with Denniston Mine being always safe.

Visitors to Denniston Mine were significantly less likely to agree a lot or totally with the site providing the opportunities to learn about stories from iwi and hapū (17% vs 34%), suitable for children (56% vs 73%) or that the story told at this site is connected to other important heritage sites around New Zealand (44% vs 61%).

Visitors agreed (a lot or totally) with the following statements to the following degree at Denniston Mine



Experience improvements

Visitors were asked how the history and heritage experience at Denniston Mine could be improved. Significantly fewer (11% vs 26%) visitors suggested nothing. Many visitors had ideas of how Denniston Mine could be improved. Key themes include comments on improving maps/direction and reopening parts of the experience. Following are some representative quotes from visitors with suggested improvements. "A map showing route to follow to see points of interest. For example, we had no idea where pit entrances / physical mine or village were" – Wellington female 70-74 years

"Continue with the ongoing improvement programme. Reopening the mine experience would be wonderful" – Canterbury female 60-64 years

"The road to Denniston could be fixed from slips" – Canterbury male 25-29 years



6.4 ARROWTOWN

This charming town reveals the stories of two very different goldrush communities: the preserved avenue where wealthy European banks and merchants traded, and the restored huts of Chinese miners who lived a much more modest lifestyle. In total n=198 visitors completed the survey at the Arrowtown. This is a small sample size; results should be treated as indicative only. They may not be representative of all visitors, or experiences.

Sample profile

- 51% of visitors live in New Zealand. This is significantly lower than the overall Tohu Whenua proportion (67%). There were 49% of visitors who live overseas.
- 71% of visitors arrived with whānau, consisting of 43% with family and 33% partners.
- Of the New Zealand visitors, 63% of visitors were from the North Island.
- Of the New Zealand visitors, 51% were NZ European, 21% were Asian, 20% were other European, 9% were Māori, 6% were Pacific peoples, and 4% were of MELAA (Middle Eastern, Latin American and African) ethnic groups.
- 53% of visitors were first time visitors to Arrowtown.
- Visitors were more likely aged under 39 years (19% vs 12% those aged under 24) (50% vs 27% those aged 25-39 years).

Marketing and branding

Visitors were asked how they learnt about Arrowtown. They were presented with a range of channels. Multiple responses were possible. The most common sources were whānau and friends (49%) and signs/passing by (11%). The former reinforces the importance of exceptional visitor experiences creating advocates for sites. Another important source for visitors was tourist/visitor maps (22%), significantly higher than for Tohu Whenua (12%).

Visitor satisfaction and time spent

Visitors were asked how satisfied they were with their experience. Most (76%) visitors reported being either very or extremely satisfied. Two percent of visitors reported being either not at all or slightly satisfied. The average overall satisfaction for Arrowtown is 4.0, lower than the Tohu Whenua average of 4.4.

Visitors were asked how likely (on a scale of 0 to 10, where 0 is very unlikely and ten is very likely) it is they would recommend Arrowtown to their whānau and friends. Eleven percent of visitors were detractors (visitors who scored 0 to 6), thirty-eight percent were passives (visitors who scored 7 or 8), and fifty-one percent were promoters (visitors who scored 9 or 10). The net promoter score (promoters minus detractors) for Arrowtown is 40 (51 minus 11) which is lower than the Tohu Whenua average of 58. Visitors were asked how long their trip was to Arrowtown. Visitors were provided with a range of durations. Under half (42%) of visitors were at Arrowtown for two to four hours. Fewer visitors were at Arrowtown for less than two hours. This indicates visitors were more likely to stay for a longer period experiencing Arrowtown.

Memorable experience

Visitors were asked what the one thing is they will remember most about their experience of history and heritage at Arrowtown. Following are some representative quotes.

"The story of the Chinese gold miners, their plight and part of Aotearoa history." – Auckland male 30-34 years

"Just being able to see the houses restored as they were really special, like travelling back in time and seeing history face-to-face." – Wellington another gender 18-24 years

"Always love visiting the Chinese settlement and thinking about what life was like back then." – Otago female 35-39 years

"The huts built by the Chinese during the gold rush, and the discrimination that they faced." – Australian female 20-24 years

Visitor benefits

Visitors were asked, when thinking about their experience at Arrowtown, how much they agree with the statements below. Most (93%) visitors agreed a lot or totally with Arrowtown being safe at all times. Visitors to Arrowtown were significantly more likely to want to learn more about Tohu Whenua (50% vs 40%).

Visitors agreed (a lot or totally) with the following statements to the following degree at Arrowtown



Experience improvements

Visitors were asked how the history and heritage experience at Arrowtown could be improved. Significantly fewer (17% vs 26%) visitors suggested nothing. Many visitors had ideas to improve the heritage experience at Arrowtown. Key themes include comments on more staff or locals, more replicas, and fewer vehicles around. Following are some representative quotes from visitors with suggested improvements.

"A movie might be nice to show how the buildings might have been used furnished since all of the buildings were empty" – Canada male 60–64 years

"Connect with local people" - Europe female 25-29 years

"Maybe close the historic road to traffic" - United Kingdom male 30-34 years

7 VISITOR/SAMPLE PROFILE

The following information was collected from visitors that completed the survey. Given the research design and limitations (see section 3 for more information) the following information should be considered more as the profile of survey respondents rather than a true visitor profile.

7.1 VISITOR ORIGIN

Visitors were asked if they normally live in New Zealand. They could answer yes or no, I am visiting New Zealand. Sixy-seven percent of visitors reported that they normally live in New Zealand.

Visitors who reported they live in New Zealand were then asked in which region they live in. Of these thirty-four percent lived in one of three current Tohu Whenua regions while the other sixty-six percent lived in non-Tohu Whenua regions.

New Zealand visitors by Tohu Whenua region



Over half (54%) of New Zealand repsondents live in the North Island.

Visitors who reported no [they do not live in New Zealand], were asked where they normally reside. Thirty percent of visitors visiting New Zealand were from Australia; twenty-four percent were from the United Kingdom; and twenty-three percent from Europe, including Germany.

7.2 DEMOGRAPHICS

Age

Visitors were asked their age. Twelve percent of visitors were under 24 years old. Twenty-seven percent of visitors were aged 25-39 years old. Thirty-one percent of visitors were 40-59 years old. Thirty percent of visitors were aged 60+ years old. Visitors were more likely to be aged 40+. There were fewer visitors aged under 24 years.



Gender

Visitors were asked their gender. Overall, there were more females than males. Fifty-six percent of visitors were female. Forty-two percent of visitors were male. The other two percent reported as being another gender (1%) or preferred not to say (1%).



Ethnicity

New Zealand visitors were asked which ethnic groups they belong to. Multiple responses were possible. Seventy-four percent of New Zealand visitors were New Zealand European. Eleven percent were of other European ethnic groups. Eight percent were Māori. Six percent were from Asian ethic groups. Three percent were of Pacific ethnic groups. Two percent were from MELAA (Middle Eastern, Latin American and African) ethnic groups.

7.3 VISITOR/GROUP CHARACTERISTICS

Repeat visitors

Visitors were asked including today how many visits in total have you ever made to [site]. Fifty-eight percent of visitors were first time visitors. The remaining forty-two percent of visitors had been to the site before. Around one in five visitors (17%) had visited the site five times or more.

Group type

Visitors were asked which category best describes your party/group. Multiple responses were possible. Seventy-four percent of visitors were with whānau (consisting of 39% of visitors who were with their partner and 37% of visitors who visited with family/whānau). Twenty percent of people visited with friends. Nine percent visited solo/on their own.

Composition of vistor groups



Group size

Visitors were asked including yourself, how many people were in your party/group. The average number was 6.2 people in each group. Responses were broken down into number of adults, and number of children (under 15). The breakdown of adults to children was an average of 5.8 adults and 0.4 children aged under 15 years.



TOHU WHENUA

Landmarks that tell our stories

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