



2021 EVALUATION OF NGĀ HAERENGA GREAT RIDES OF NEW ZEALAND

JANUARY 2022

CONTENTS

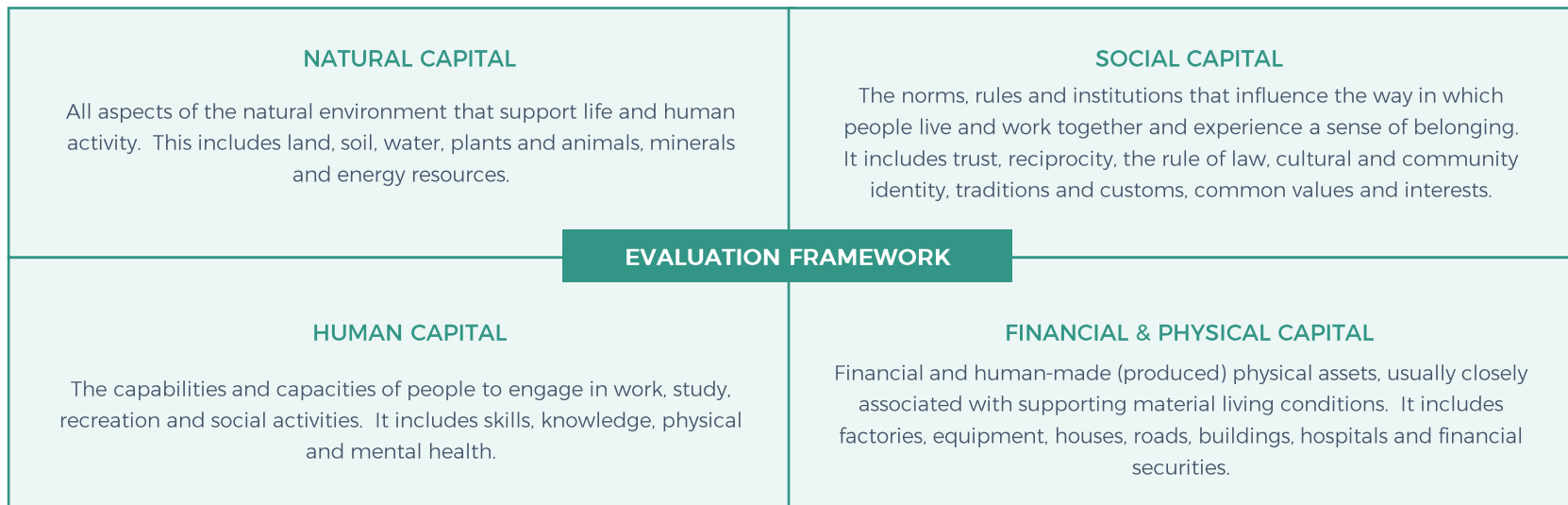
	Page #
Introduction	3
Executive Summary	5
Summary of Key Evaluation Findings	7
Trail Usage	9
Trail Usage	10
Investment per Trail Trip	11
Natural Capital	12
Satisfaction and Net Promoter Score	13
Felt Impact of Cycle Trail Experience	14
Environmental Regeneration and Commuter Use	15
Social Capital	16
Trips by Local Residents	17
Community Support	18
Local Funding and Volunteer Contributions	19
Inclusiveness	20
Human Capital	21
Health and Reported Benefits	22
Incidents/Hazards Reported by Trail Users	23

	Page #
Financial & Physical Capital	24
Visitor Nights	25
Visitor Expenditure	26
Enterprise	28
New Enterprise	29
Enterprise Development	30
Employment	32
Reported Impact on Wider Region	33
Appendices	34
A: Evaluation Framework	35
B: Survey Methodology	40
C: Individual Trail Counts	41

INTRODUCTION

This report presents the findings of the 2021 Evaluation of Ngā Haerenga Great Rides of New Zealand. It details how the 22 Great Rides that make up Ngā Haerenga are impacting trail users, the communities in which the trails are located, and Aotearoa New Zealand as a whole.

The evaluation framework¹ was developed to consider impacts across the four capitals identified in Treasury's Living Standards Framework² - **natural capital, social capital, human capital** and **financial and physical capital** – which, together, support the wellbeing of New Zealanders now and into the future.



The evaluation framework was also designed to align with and to support the strategic frameworks of partner agencies:

- Ministry of Business, Innovation & Employment (MBIE) and the Cost Benefit Analysis (CBA) used to evaluate outcomes³
- Department of Conservation (DOC) Heritage & Visitor Strategy⁴
- Waka Kotahi NZ Transport Agency Arataki⁵

¹ Refer to Appendix A for a copy of the 2021 Evaluation Framework

² <https://www.treasury.govt.nz/information-and-services/nz-economy/higher-living-standards/our-living-standards-framework>

³ <https://www.mbie.govt.nz/immigration-and-tourism/tourism/tourism-funding/nga-haerenga-the-new-zealand-cycle-trail/> and <https://www.mbie.govt.nz/dmsdocument/1248-nz-cycle-trail-evaluation-report-2016-pdf>

⁴ <https://www.doc.govt.nz/heritage-and-visitor-strategy>

⁵ <https://www.nzta.govt.nz/assets/planning-and-investment/arataki/docs/arataki-at-a-glance-august-2020.pdf>

INTRODUCTION CONT.

An initial set of indicators and measures was developed in consultation with Ngā Haerenga NZ Cycle Trails, Trail Managers, MBIE, DOC and Waka Kotahi, with data for the evaluation drawn from the range of sources outlined below. For further information on survey methodology, please refer to Appendix B.

TRAIL COUNTER DATA

Trail counters are installed on each of the 22 Great Rides that make up Ngā Haerenga (including some counters managed by DOC and private land owners). In early July 2021, trail counter data was extracted from the Be Counted system and otherwise sourced from DOC and private landowners via Trail Managers before being checked and cleaned for analysis.

Data used for the 2021 evaluation encompasses the full year ending 30 June 2021 and, where relevant, has been compared with data drawn from an earlier analysis for the year ending February 2020 undertaken by Jonathan Kennett and Marilyn Northcote for MBIE.⁶

SURVEY OF TRAIL USERS

An ongoing survey of Trail Users is undertaken using a survey application developed for Ngā Haerenga NZ Cycle Trails and the 22 Great Rides that make up the network.

The data used for the current evaluation is based on survey samples of n=6012 trail users in the year ending June 2021 and n=5089 trail users in the preceding year (year ending June 2020).

A new set of measures was developed to support the evaluation framework and the relevant questions were added to the Trail User survey from 1 May 2021. The measures which draw on this data (e.g. inclusiveness, felt benefits) are based on a smaller survey sample (approximately n=600, but varying by measure).

SURVEY OF TRAIL MANAGERS

A new survey of Trail Managers was designed to capture the data required for this evaluation and the survey was undertaken in May/June 2021.

All 22 Trail Managers completed the survey.

SURVEY OF TRAIL STAKEHOLDERS

A new survey of Community Stakeholders was also designed to capture the data needed for the evaluation and the survey was undertaken in May/June 2021.

Initial databases were compiled by Trail Managers, with contacts requested across a range of stakeholder groups, including Iwi, hapū and marae groups; businesses providing products/services for people using the trails; local government entities; local schools, sporting and recreation groups; and other community groups.

All contacts were emailed with a personal invitation to complete the online survey. A generic survey link was also provided for wider distribution by the trails.

Data for the evaluation is based on a final sample of n=369 stakeholders across the 22 Great Rides.

A breakdown of the survey sample can be found on page 18.

Following a summary of key insights, the evaluation report is presented in five sections. The first section summarises use of Ngā Haerenga Great Rides of NZ, and the following four sections each present findings relating to one of the four capitals of wellbeing. It is anticipated that the evaluation framework will evolve over time, with some measures refined and others added in future years. In the meantime, the findings of this year's evaluation present a compelling story of how the Ngā Haerenga Great Rides of NZ are contributing to the wellbeing of trail users and communities across the country.

EXECUTIVE SUMMARY

This report presents the findings of the 2021 evaluation undertaken to assess how the 22 Great Rides that make up Ngā Haerenga NZ Cycle Trails are impacting trail users, the communities in which the trails are located, and Aotearoa New Zealand as a whole. It provides compelling evidence of the many ways in which Ngā Haerenga is having positive impact, and the sheer scale of that impact.

Compared with the year ending February 2020, the latest year saw a **+10% increase in trail users** (and +14% increase in **cycling** trail users), despite the COVID-19 pandemic and its impact both on international visitor activity and domestic travel for periods of the year. Of even greater note is the trails' stimulation of domestic tourism activity through a difficult year, with a +18% increase in visitor nights directly attributable to the trails and a +31% increase in visitor expenditure. It is estimated that in the last 12 months and based on visitor expenditure alone, the direct economic contribution of the trails to their regions was **around \$950 million**.

In the same period, it is estimated that approximately \$10 million was spent by Trail Managers on the trails (including both capital and operating expenditure). This equates to \$9.04 per cyclist using Ngā Haerenga Great Rides of NZ, or just \$4.50 for each user overall (including pedestrians). It is noted that this does not take into account expenditure which is not immediately visible to Trail Managers (e.g. separate investment by DOC and Waka Kotahi, or funding from MBIE which is directed through local government for trail development).

Beyond economic benefit, it is apparent that the Ngā Haerenga Great Rides of NZ deliver a host of benefits to individuals, to communities, and to the country as a whole. Trail users report high levels of satisfaction with their trail experience and significant personal benefit associated with physical health, mental health, social group connection, engagement with the natural environment and local culture and heritage. The physical health benefit reported by trail users is supported by a calculated health benefit of \$11 million resulting from trail use for cycling only.

Community stakeholders express high levels of support for their local Great Ride, and demonstrate the extent to which they value this asset by their extensive use, significant financial investment, and scale of volunteer contribution.

Finally, it appears that Ngā Haerenga Great Rides of NZ are contributing significantly to New Zealand's natural capital both indirectly (by connecting trail users with the natural environment, building understanding of that environment, and creating advocates for conservation in the process) and directly (via planting of native trees/shrubs/flaxes/rushes, fencing of waterways and pest management initiatives by Trail management and volunteers).

For the future, the findings of this evaluation suggest opportunities to broaden the base of users benefiting from the Great Rides (with a particular focus on engaging Māori and Pasifika). They also suggest that ongoing management of the trail user experience – both through mitigation of the risks that can adversely affect a trail user's experience and through initiatives designed to enhance enjoyment – will not only protect but further grow the range of benefits that flow from Ngā Haerenga Great Rides of NZ.

2021 EVALUATION OF NGĀ HAERENGA GREAT RIDES OF NZ



1,087,748
(+14% YoY)



1,098,913
(+7% YoY)



2,186,662
(+10% YoY)

NATURAL CAPITAL



+76

Net Promoter Score

As a result of their Ngā Haerenga Great Rides of NZ experience...



51% of trail users say they appreciate the natural environment more



29% of trail users say they appreciate the local culture and heritage more



In 2021 alone...
24,870 native trees/shrubs have been planted by trail managers



128 kilometres of waterways have been fenced by trail managers

FINANCIAL/PHYSICAL CAPITAL

Visitation to the region because of a Great Ride...



1,064,904 visitors
(+15% YoY)



3,620,675 nights
(+18% YoY)



\$951 million spend
(+31% YoY)



795

Official Cycle Trail partners



1,591

Businesses providing facilities and services for Great Rides users

As a result of cycling on the Great Rides there is an associated...



\$11,195,268 in health benefit

As a result of their Ngā Haerenga Great Ride of NZ experience...

56% of trail users say their sense of wellbeing or mental health has improved

47% of trail users say their physical fitness has improved

44% of trail users say they developed a closer relationship with the people they were with

HUMAN CAPITAL

SOCIAL CAPITAL



Local residents
785,012 trips (+1% YoY)



New Zealand residents
2,153,862 trips (+25% YoY)



International visitors
32,800 trips (-87% YoY)



88% of stakeholders agree that their local Great Ride is valued by the community

Across the Great Ride network...



808 volunteers



17,069 hours in past 12 months



\$593,318 value of contribution

SUMMARY OF KEY EVALUATION FINDINGS

The table below and overleaf summarises key evaluation findings for the year ending June 2021 and compares results with the prior year, where available.

		YE June 2021	YE Feb 2020
Trail Usage	Trips taken by cyclists	1,087,748	955,175
	Trips taken by pedestrians	1,098,913	1,026,897
	All trips	2,186,662	1,982,072
Natural Capital	Trail user satisfaction (<i>% of trail users rating their experience 9 or 10 on a 10-point scale</i>)	74%	74% ⁷
	Net Promoter Score	+76	+75 ⁷
	Proportion of trail users reporting the following as a result of their Great Ride experience:		
	... understand more about the natural environment	26%	n/a
	... understand more about the local culture and heritage	35%	n/a
	... appreciate the natural environment more	51%	n/a
	... appreciate the local culture and heritage more	29%	n/a
	... are more conscious of their impact on the environment	22%	n/a
	... are more determined to protect the natural environment	32%	n/a
	... are more determined to protect our culture and heritage	17%	n/a
	Native trees/shrubs planted (last 12 months)	24,870	n/a
Native flaxes/rushes planted (last 12 months)	8,250	n/a	
Kilometre of waterway fenced (last 12 months)	128	n/a	
Traps laid for pests (last 12 months)	1,202	n/a	
Estimated trips taken for commuting purposes	32,800	n/a	
Social Capital	Trips taken by local residents of Great Ride area	785,012	778,954
	Trips taken by New Zealand residents (i.e. local residents and domestic visitors to the area)	2,153,862	1,726,385
	Trips taken by international visitors	32,800	255,687
	Number of volunteers (last 12 months)	808	n/a
	Number of volunteer hours (last 12 months)	17,069	n/a
	Value of volunteer contribution (calculated at average hourly wage)	\$593,318	n/a

SUMMARY OF KEY EVALUATION FINDINGS CONT.

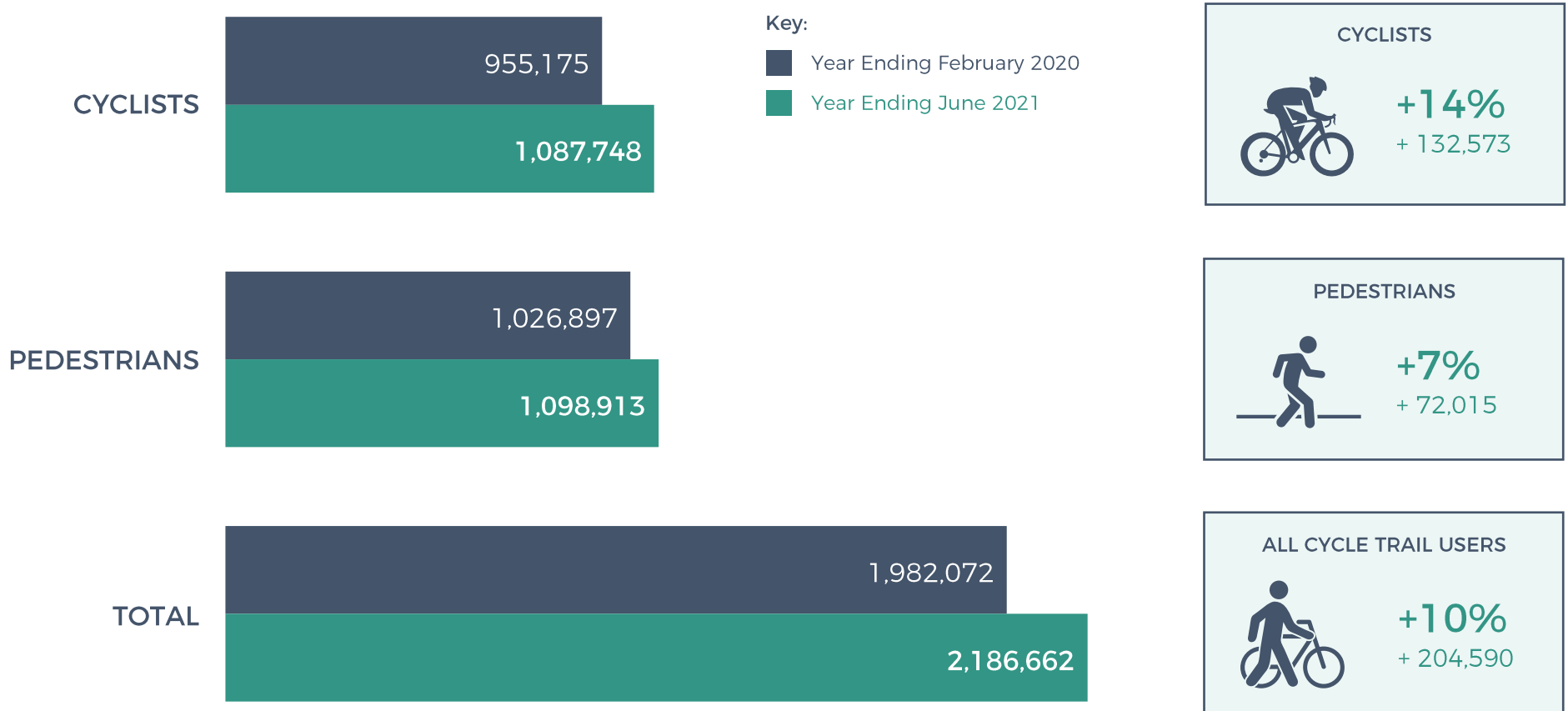
		YE June 2021	YE Feb 2020
Social Capital (continued)	Proportion of trail stakeholders reporting that they agree/agree strongly that their local Great Ride:		
	... has increased the profile of the area	91%	n/a
	... is valued by the local community	88%	n/a
	... is a source of pride for the local community	86%	n/a
	... is creating greater understanding of the area's natural environment	83%	n/a
	... has become part of the community's identity	82%	n/a
	... is accessible to a wide range of people regardless of skill/physical (dis)ability	81%	n/a
	... is making the area a more vibrant or appealing place to live	81%	n/a
	... has been a catalyst for investment in the area	78%	n/a
	... is improving overall quality of life in the area	76%	n/a
... has been a catalyst for community development	73%	n/a	
... is creating a greater understanding of the area's cultural heritage	58%	n/a	
Human Capital	Calculated value of health benefit resulting from trail use for cycling	\$11,195,268	n/a
	Proportion of trail users reporting the following as a result of their Great Ride experience:		
	... my sense of wellbeing or mental health has improved	56%	n/a
	... my physical health has improved	47%	n/a
	... I have developed a closer relationship with the people I was with	44%	n/a
... I have developed or improved my skills	34%	n/a	
... I have learned more about myself	15%	n/a	
Financial and Physical Capital	Number of visitors to the Great Ride areas attributable to the trail	1,064,904	927,610
	Number of visitor nights in the Great Ride areas attributable to the trails	3,620,675	3,061,112
	Visitor expenditure in the Great Ride areas attributable to the trails	\$950.9 million	\$724.7 million
	Trail Manager count of businesses providing facilities and services for Great Rides users	1,591	n/a
	Official Cycle Trail partners	795	n/a
	Proportion of Local Government and Business Group stakeholders reporting that their local Great Ride is an important factor in...		
... attracting visitors to the area	91%	n/a	
... attracting people to live in the area	47%	n/a	
... attracting people to study in the area	8%	n/a	
... attracting people to do business or invest in the area	62%	n/a	

A man and a woman are riding bicycles on a trail. The man is on the left, wearing a white helmet and a light-colored long-sleeved shirt. The woman is on the right, wearing a white helmet and a red long-sleeved shirt. They are both smiling and looking towards the right. The background is a blurred outdoor setting. The entire image is overlaid with a semi-transparent blue filter.

TRAIL USAGE

TRAIL USAGE

In the year ending June 2021, almost 2.19 million trips were taken across the Ngā Haerenga Great Rides of NZ network.⁸ These trips were divided more or less equally between cyclists and pedestrians. Relative to the year ending February 2020, this represents +14 percent growth in the number of trips undertaken by cyclists and seven percent growth in trips taken by pedestrians – an increase of +10 percent overall.



INVESTMENT PER TRAIL TRIP

The combined expenditure reported by Trail Managers **for their last financial year** was \$9.8 million.⁹ Applied to trip counts for the year ending June 2021, this equates to \$9.04 for each cycle trip using the Ngā Haerenga Great Rides of NZ network or \$4.50 for each trip overall (including pedestrians).

It is noted that these calculations do not take into account expenditure which is not immediately visible to Trail Managers (for example, separate investment by DOC and Waka Kotahi, or funding made available by MBIE and directed through local government agencies for trail development). Future evaluations will ideally quantify the totality of investment.



\$9,836,828

Total Expenditure



\$9.04

Expenditure per cyclist



\$4.50

Expenditure per user overall

⁹Source: Trail Manager Survey (n=22). The relevant question asks Trail Managers to specify, for their last financial year, total capital expenditure (e.g. money spent on acquiring/improving fixed assets, such as land, buildings and equipment – excluding new purchases of land/property) and total operating expenditure in each of the following areas: rent/leases; salaries, wages and other employment costs (such as ACC contributions, sick and holiday pay, directors' fees); repairs and maintenance; advertising/promotion and other marketing costs; and other operating expenses (e.g. insurance, energy, subscriptions, accounting fees).



INDICATORS OF CONTRIBUTION TO NATURAL CAPITAL


As described in Treasury's Living Standards Framework, [Natural Capital](#) is all aspects of the natural environment that support life and human activity. This includes land, soil, water, plants and animals, minerals and energy resources.

As indicators of Ngā Haerenga's contribution to natural capital we have selected measures of trail user experience. These assume that a positive experience of New Zealand's natural environment will increase an individual's understanding and appreciation of that environment and their desire to see it protected.


Also included as measures of contribution to natural capital are the activities undertaken by trail managers/staff/volunteers to protect and enhance the natural environment, and the use of the trails for commuting/active transport.

SATISFACTION AND NET PROMOTER SCORE

Users of the Ngā Haerenga Great Rides of NZ network express very high levels of satisfaction with their trail experience, with three in four rating that experience 9 or 10 (out of 10). The Net Promoter Score (NPS) which measures an individual's propensity to recommend the Great Rides has increased one point in the most recent year to an exceptional +76.¹⁰



74%
rated their trail experience 9 or 10 (out of 10)
74% for the year ending June 2020



+76
Net Promoter Score
+75 for the year ending June 2020

	YE June 2020	YE June 2021
10 (Very Satisfied)	52%	51%
9	22%	23%
8	15%	16%
7	6%	6%
6	2%	2%
5	1%	1%
4	1%	1%
3	1%	0%
2	0%	0%
1 (Very Dissatisfied)	0%	0%
Average	9.0	9.0

Net Promoter Score (NPS) is an indicator used globally to measure customer engagement and advocacy, based on the likelihood of a customer recommending a given product or service. Any positive score means there are more loyal advocates willing to recommend the product or service (promoters) than unhappy critics (detractors). A passive customer is satisfied, but unenthusiastic. A high score of +100 means that every customer is a promoter, while a low score of -100 means that every customer is a detractor.

	YE June 2020	YE June 2021
Promoters (9-10)	80%	80%
Passives (7-8)	15%	16%
Detractors (0-6)	5%	4%
Net Promoter Score	+75	+76

FELT IMPACT OF CYCLE TRAIL EXPERIENCE

As a result of their Ngā Haerenga Great Rides of NZ experience, more than one in five trail users report that they are more conscious of their impact on the environment. Half report having a greater appreciation of the natural environment and a third indicate they are more determined to protect the natural environment as a consequence of their experience.¹¹

UNDERSTANDING



26%

Understand more about the natural environment

35%

Understand more about the local culture and heritage

VALUE



51%

Appreciate the natural environment more

29%

Appreciate the local culture and heritage more

AWARENESS



22%

Are more conscious of their impact on the environment

MOTIVATION



32%

Are more determined to protect the natural environment

17%

Are more determined to protect our culture and heritage

ENVIRONMENTAL REGENERATION AND COMMUTER USE

Across the Great Rides network, almost a quarter of a million native trees, shrubs, flaxes or rushes have been planted, more than 900 kilometres of waterways have been fenced and more than 3,000 traps laid for pests.¹² In the year ending June 2021, there were almost 33,000 commuting/active transport trips taken on the cycle trails (1.5 percent of all trips).¹³ This has fallen slightly from the 2.6 percent of trips recorded in the preceding year but is not surprising given the effect of lockdowns and greater propensity to work from home during the COVID-19 pandemic.

ENVIRONMENTAL PROTECTION & REGENERATION



184,482

native trees/shrubs have been planted
(24,870 in the last 12 months)



51,250

native flaxes/rushes have been planted
(8,250 in the last 12 months)



927 kilometers

of waterways have been fenced
(128 kilometers in the last 12 months)



3,432

traps have been laid for pests
(1,202 in the last 12 months)

COMMUTER USE OF THE GREAT RIDES

For the year ending June 2021,



32,800 cycle trail trips

involved a commute to/from school or work

(representing 1.5% of all cycle trail trips taken)

In the year ending June 2020, 51,534 cycle trail trips involved a commute to/from school or work (2.6% of all cycle trail trips taken)

¹² Source: Trail Manager Survey (n=22).

¹³ Calculated by applying the proportion of trips taken for the purpose of commuting to/from school or work as reported by trail users (Trail User Survey) to trail counter data. Trail User Survey: YE June 2020 (n=5,089), YE June 2021 (n=6,012).



INDICATORS OF CONTRIBUTION TO SOCIAL CAPITAL

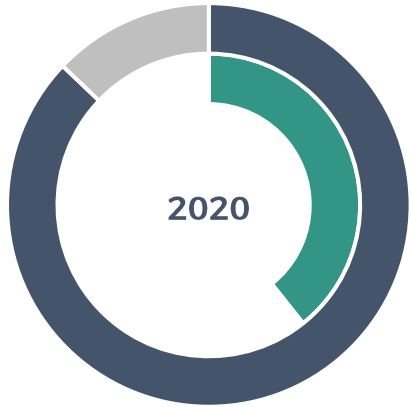
Social Capital is the norms, rules and institutions that influence the way in which people live and work together and experience a sense of belonging. It includes trust, reciprocity, the rule of law, cultural and community identity, traditions and customs, common values and interests.

As indicators of Ngā Haerenga's contribution to social capital we have used measures that reflect how communities use, value and support their cycle trails.

We have also considered the profile of trail users – specifically in relation to ethnicity and disability – to assess inclusiveness.

TRIPS BY LOCAL RESIDENTS

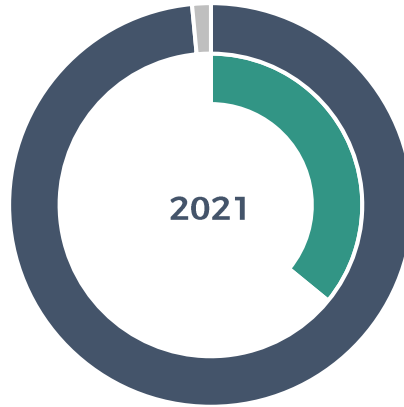
Patronage of the Great Rides is measured here in 'trips', rather than 'users' (as it is difficult to ascertain the frequency of trips taken by any given individual). In the year ending June 2021, 785,000 individual **trips** were made by residents of local communities (an increase of almost 1% on the previous year).¹⁴ In total, New Zealand residents (including those living locally) accounted for more than 98 percent of trips in the year to June 2021 (with the number of trips increasing by almost 25% to 2.1 million). Use of the trails by international visitors was significantly impacted by closure of the international border.



39.3%
Local residents
(778,954 trips)

87.1%
New Zealand residents
(1,726,385 trips)

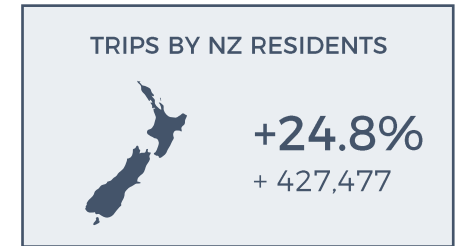
12.9%
International visitors
(255,687 trips)



35.9%
Local residents
(785,012 trips)

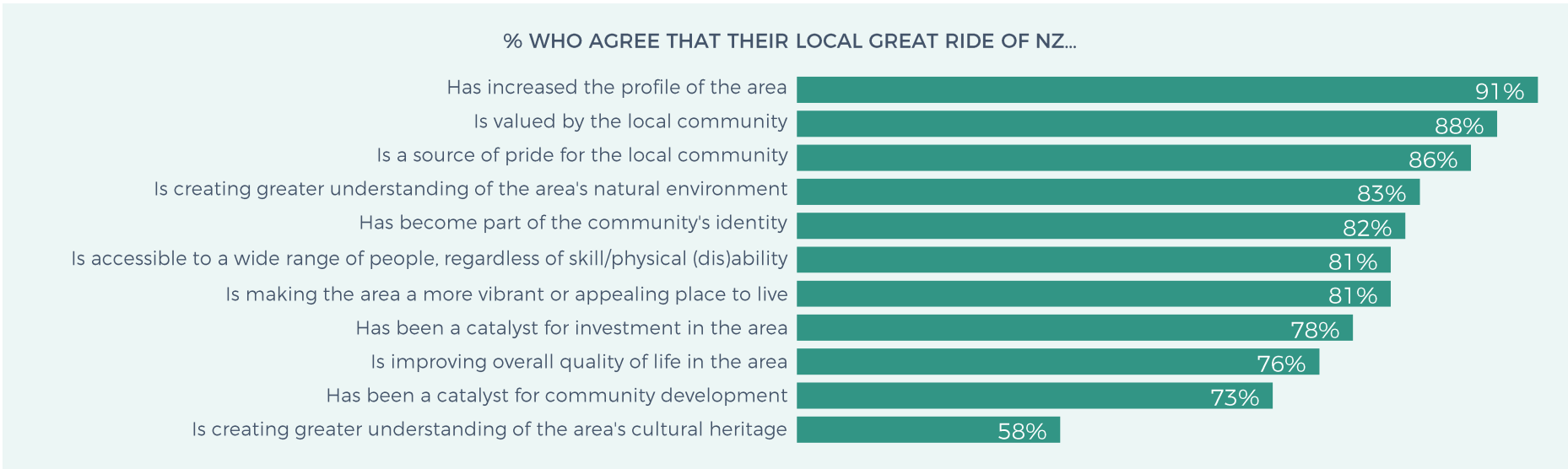
98.5%
New Zealand residents
(2,153,862 trips)

1.5%
International visitors
(32,800 trips)



COMMUNITY SUPPORT

There is strong community support for the Ngā Haerenga Great Rides of NZ network, with nine in ten stakeholders reporting that their local Great Ride had increased the profile of their area and a similar proportion reporting that it is valued by the local community. The great majority of stakeholders also agree that their local Great Ride is a source of pride for the local community, that it has become part of the community's identity, that it has been a catalyst for investment in the area, and that it improves the overall quality of life for residents.¹⁵



54%

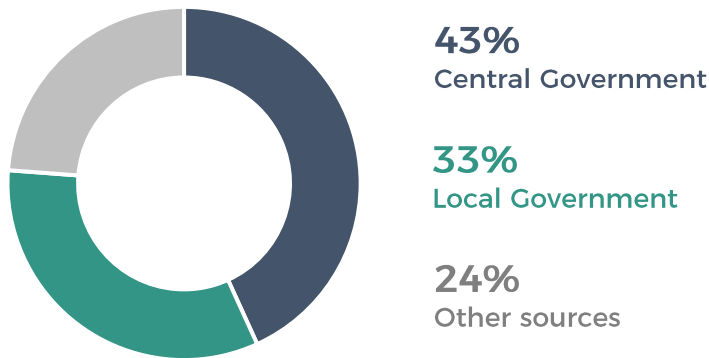
of respondents were representatives of businesses providing products, services or activities for people using the Great Rides

Stakeholder Survey Sample Composition	
54%	Business providing products, services or activities for people using the trail
2%	Chamber of Commerce or other business/sector group
8%	Territorial Authority/Local Government agency
5%	Economic Development Agency/Regional Tourism Organisation
1%	Iwi, hapu or marae group
2%	School
1%	Competitive recreation or sporting group/club
5%	Social recreation or sporting group/club
4%	Charitable trust
2%	Other community group/club (e.g. Rotary, Probus)
15%	Other

LOCAL FUNDING AND VOLUNTEER CONTRIBUTIONS

Based on income reported by Trail Managers, Central Government provides 43 percent of the funding for Ngā Haerenga Great Rides of NZ.¹⁶ Local Government contributes a third of trail income (and up to 50 percent or more for some trails). Across the Great Rides network, more than 800 individuals working as volunteers have contributed more than 17,000 hours in the last 12 months. At the average hourly wage of \$34.76 this equates to a contribution of almost \$600,000 in value.¹⁷

FUNDING SOURCES FOR GREAT RIDES OF NZ



	Funding Source
Monetary grants from Central Government (e.g. MGR funding)	43%
Monetary grants from Local Government	33%
Monetary grants from other sources (e.g. Community Trusts)	5%
Commercial revenues (e.g. from events, ticket sales, concession fees)	6%
Official partner fees	2%
Corporate sponsorship (in cash)	4%
In-kind support/sponsorship (e.g. value of goods and services provided)	3%
Other income (e.g. interest)	4%

VOLUNTEER CONTRIBUTIONS



808
Volunteers across
the Great Rides
network



17,069
Hours contributed in
the last 12 months



\$593,318
Total value of
contribution


¹⁶ Source: Trail Manager survey 2021 (n=22). Note that income reported by Trail Managers excludes separate investment in the trails by DOC and Waka Kotahi, and funding made available by MBIE and directed through local government agencies for trail development.

¹⁷ The total value of volunteer contribution has been calculated by multiplying the total volunteer hours reported by Trail Managers by the average hourly wage of \$34.76 per hour (source: Statistics NZ, Quarterly Employment Survey, June 2021)

INCLUSIVENESS

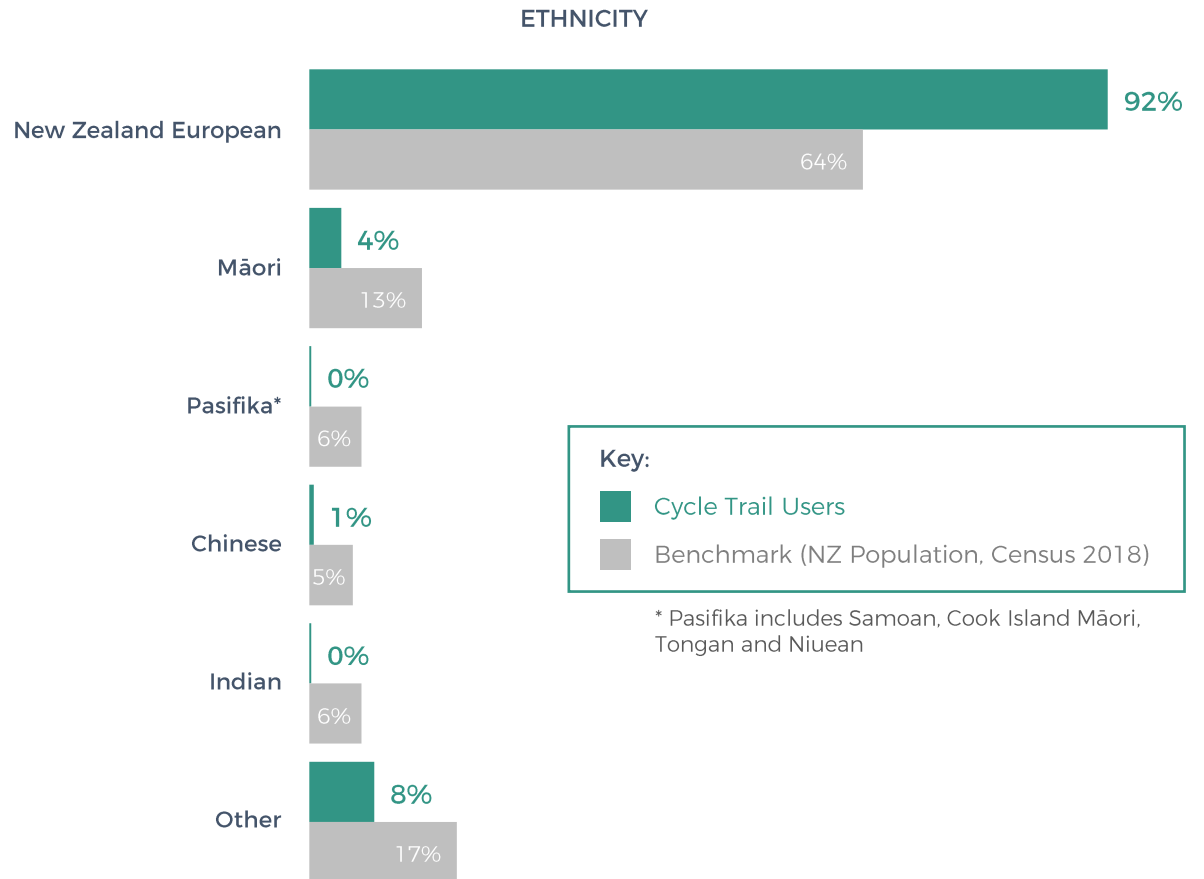
To begin assessing inclusiveness, new measures of ethnicity and physical disability were added to the Trail User survey in May 2021. Considered by ethnicity, those identifying as NZ European are over-represented amongst trail users and those identifying as Māori, Pasifika and all other ethnicities are under-represented. 29 percent of trail users report a disability or impairment: this aligns broadly with the incidence of disability in the New Zealand population as a whole,¹⁸

DISABILITY



29%
report some form of
disability or impairment

¹⁸ Disability was measured using the Washington Group Short Set of questions. Sport NZ uses the same measure in its ActiveNZ population survey, from which it reports disability at 33% based on an individual reporting 'some difficulty', 'a lot of difficulty' or 'cannot do at all' in at least one domain measured.





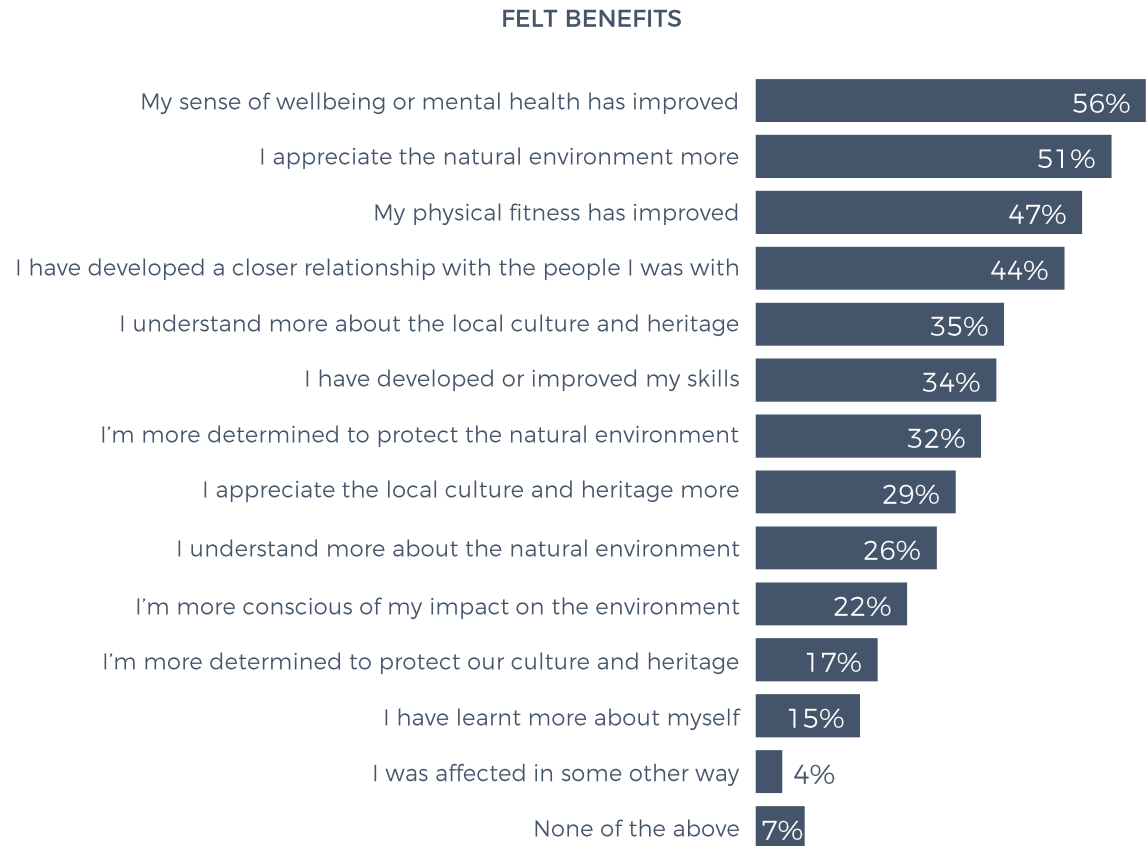
INDICATORS OF CONTRIBUTION TO HUMAN CAPITAL

Human Capital is the capabilities and capacities of people to engage in work, study, recreation and social activities. It includes skills, knowledge, physical and mental health.

As indicators of Ngā Haerenga's contribution to human capital we have looked at the health benefit accruing from use of the trails for cycling, along with a range of other physical, mental health and social group benefits reported by trail users. We have also examined the health and safety incidents and hazards reported by trail users as indicators of potential risk.

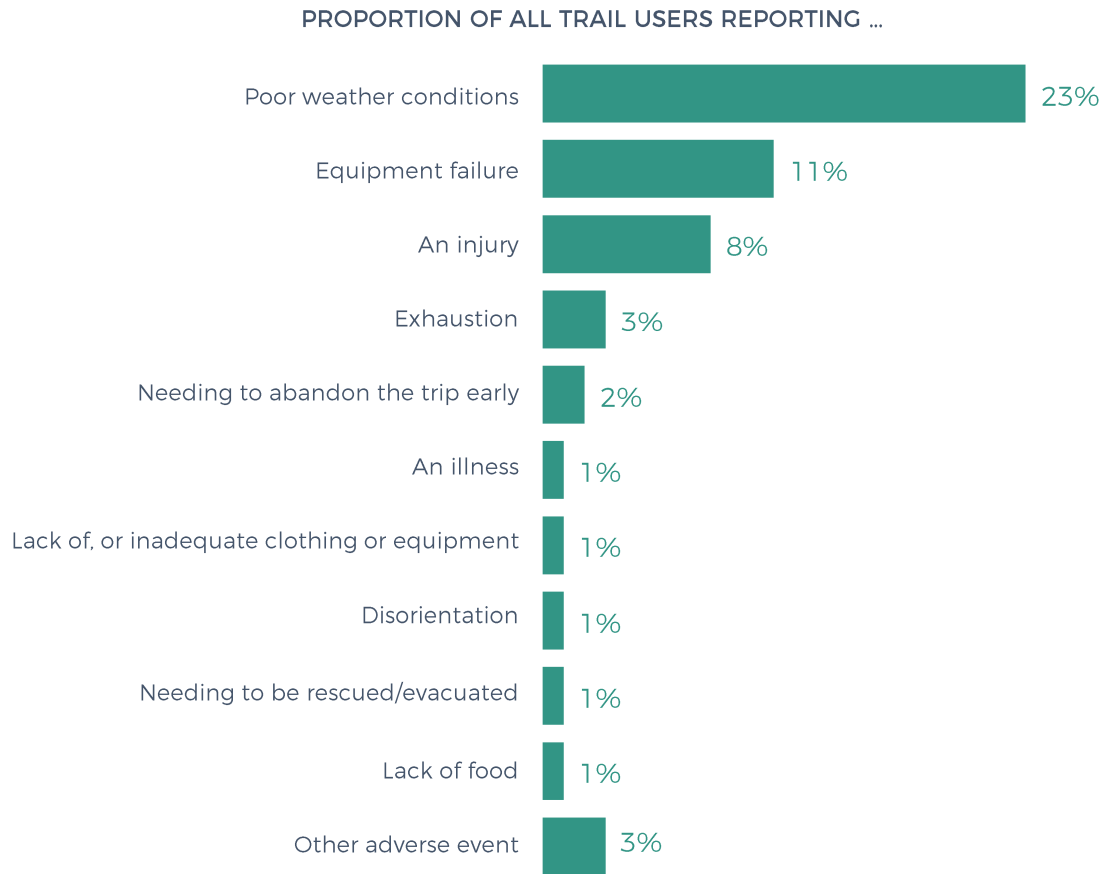
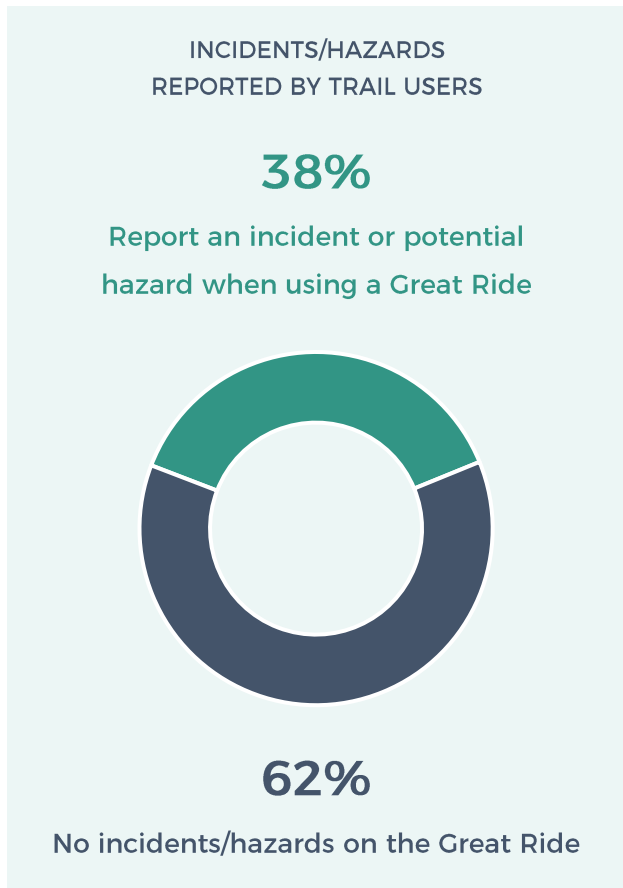
HEALTH AND REPORTED BENEFITS

Using Waka Kotahi’s Economic Evaluation Manual 2016 as a reference, the combined health benefit of cycle use on the Ngā Haerenga Great Rides of NZ has been calculated at more than \$11 million for the year to June 2021.¹⁹ In the same period, more than half of trail users reported that their physical fitness had improved as a result of their trail experience and more than half reported a **positive mental health benefit**. Amongst other benefits reported by trail users were social connection and skill development.²⁰ As reported earlier (in relation to Natural Capital), a user’s trail experience also contributes to a greater understanding and appreciation of the natural environment, and of culture and heritage.



INCIDENTS/HAZARDS REPORTED BY TRAIL USERS

The extent to which health and safety-related incidents and hazards are reported by trail users is an indicator of potential risk: the **types** of incidents/hazards reported highlight areas in which further support may be needed if trail users are to be prepared for any challenging situations they may face. While fewer than 40 percent of trail users did report a safety-related incident or hazard in the months of May and June 2021 (the first months in which this question was included in the trail user survey), significant numbers did encounter adverse weather (23%) or equipment failure (11%). Further, eight percent of all trail users reported having experienced some form of injury.²¹





INDICATORS OF CONTRIBUTION TO

FINANCIAL & PHYSICAL CAPITAL

Financial and Physical Capital is financial and human-made (produced) physical assets, usually closely associated with supporting material living conditions. It includes factories, equipment, houses, roads, buildings, hospitals and financial securities.

As indicators of Ngā Haerenga's contribution to financial and physical capital we have considered how the trails contribute to economic activity in their regions, including the extent to which they generate visitor nights, visitor expenditure, enterprise activity and employment.

VISITOR NIGHTS

Trail user survey data indicates that in both of the last two years, almost half of all cycle trail users had been visiting the area because of the cycle trail (and not primarily for some other reason).²² This equates to more than one million individual visitors contributing more than 3.6 million visitor nights to the Great Rides regions in the last financial year. This is an increase of more than 550,000 nights (or +18 percent) on the previous year.²³

VISITOR ACTIVITY ON THE GREAT RIDES OF NZ



48.7%

Visited the region because of a Great Ride
(46.8% in 2020)



1,064,904

Total visitors attributed to the Great Rides of NZ
(927,610 visitors in 2020)



3.4

Average visitor nights
(3.3 visitor nights in 2020)



3,620,675

Visitor nights
(3,061,112 visitor nights in 2020)

TOTAL VISITOR NIGHTS

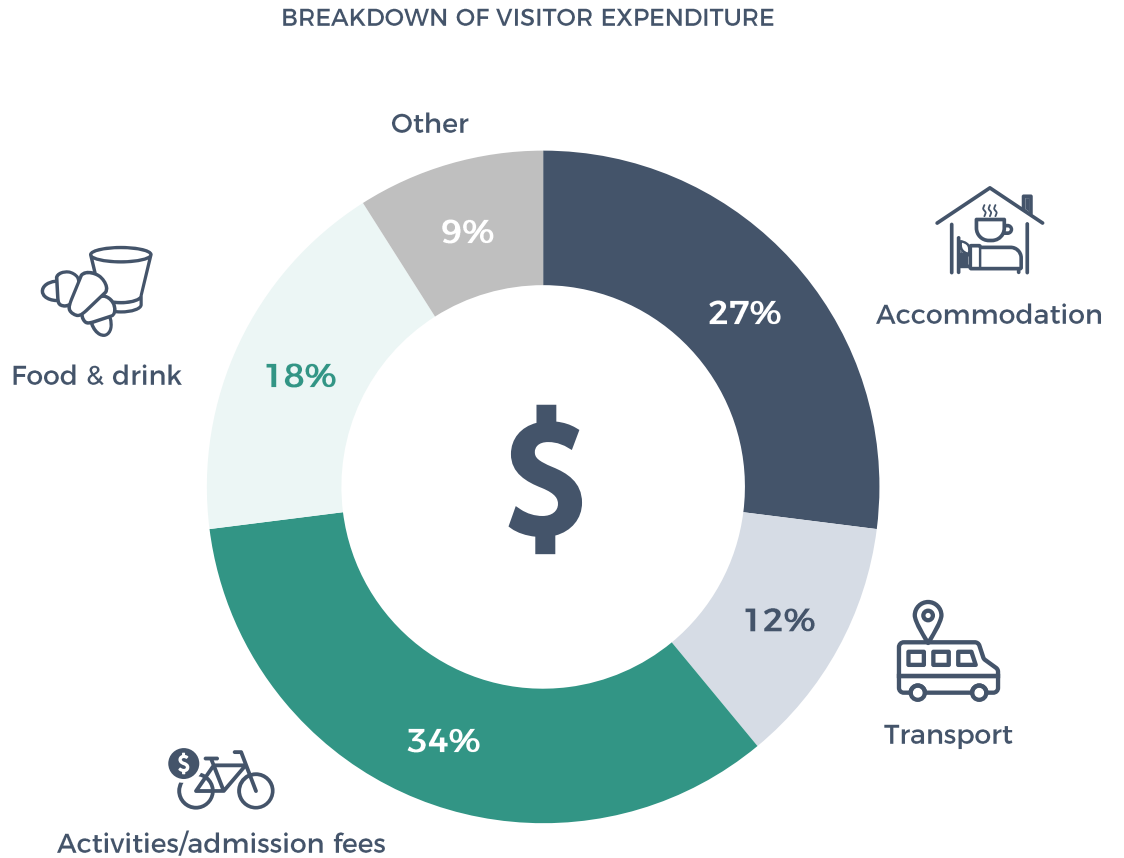
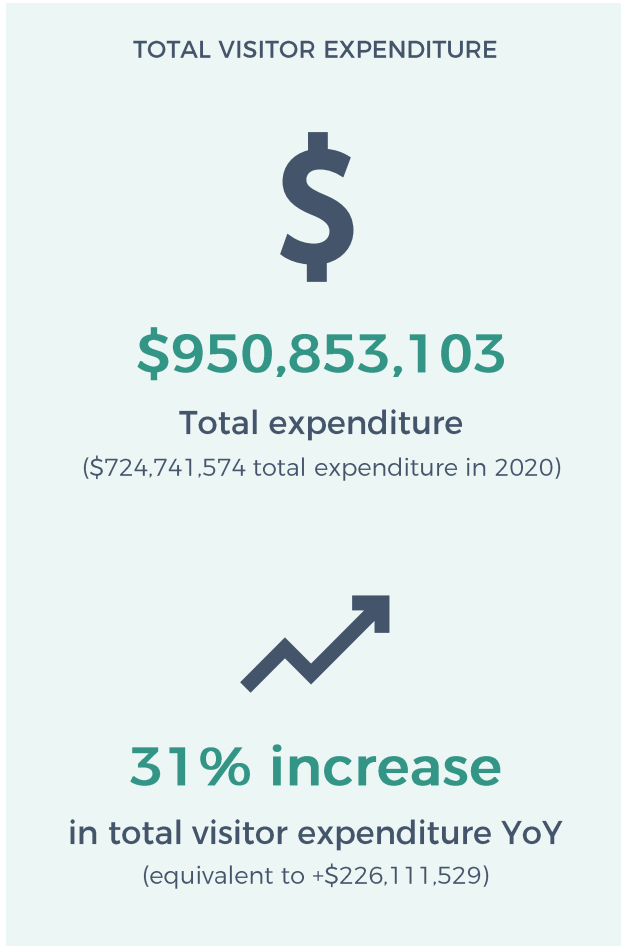


18% increase

in visitor nights year on year
(equivalent to +559,562 visitor nights)

VISITOR EXPENDITURE

Using a combination of trail user survey data and counter data, the Ngā Haerenga Great Rides of NZ network is estimated to have delivered more than \$950 million in new expenditure to host regions in YE June 2021 (an increase of 31 percent on the previous year).²⁴



²⁴ Calculated by taking the total number of people a) visiting a Great Ride area and b) only/mainly because of the Great Ride (48.7% of trail users or 1,064,904 of the 2,186,662 total count) and multiplying this number by average expenditure reported per person by respondents to the Trail User survey (\$781.30 YE Feb 2020, \$892.20 YE Jun 2021). Sample: visiting the region because of a Great Ride: YE Feb 2020 (n=1,973), YE Jun 2021 (n=2,925).

VISITOR EXPENDITURE CONT.

The cycle trails' economic contribution to the regions is spread across all sectors of the economy, with cycle trail activities/admission fees, accommodation and hospitality businesses reaping the largest shares of visitor expenditure. The average expenditure per cycle trail user is almost \$900, increasing 14 percent on the previous year.²⁵

VISITOR EXPENDITURE PER PERSON



\$892.20

Average expenditure per person

(\$781.30 per person in 2020)



14% increase

in visitor expenditure per person

(equivalent to +\$111.60 per person)

In-region expenditure	YE February 2020		YE June 2021		YoY change
	Average Spend	%	Average Spend	%	%
Accommodation	\$233.10	30%	\$243.30	27%	4.4%
Petrol/fuel	\$33.00	4%	\$33.00	4%	0.0%
Transport (cycle trail specific)	\$53.30	7%	\$56.30	6%	5.6%
Other transport	\$21.40	3%	\$17.40	2%	-18.7%
Activities/admission fees (cycle trail specific)	\$206.10	26%	\$277.60	31%	34.7%
Other activities/admission fees	\$20.00	3%	\$24.90	3%	24.5%
Snacks/groceries	\$50.70	6%	\$44.90	5%	-11.4%
Cafes, restaurants, eating out	\$112.00	14%	\$113.20	13%	1.1%
Bars, nightclubs	\$21.30	3%	\$21.60	2%	1.4%
Other expenditure	\$30.50	4%	\$60.70	7%	99.0%
Total Expenditure	\$781.30		\$892.90		14.3%

²⁵ Average expenditure reported per person by respondents to the Trail User survey. The average is calculated taking into account both day and overnight visitors and adults and children (with each adult assigned a value of 1 and each child a value of 0.5 in the calculation). Data is collected for the individual respondent or group of which they are part (by respondent preference) and broken down across the range of categories shown. Sample: visiting the region because of a Great Ride: YE Feb 2020 (n=1,973), YE Jun 2021 (n=2,925).

ENTERPRISE

Trail Managers estimate that there are almost 1,600 individual businesses providing facilities and services for trail users (approximately half of whom are official trail partners). More than 1,000 of these businesses are thought to offer accommodation and almost 800 food and beverage services. Furthermore, almost 350 of the businesses thought to offer activities and attractions not directly related to the trails still benefit from the packaging and promotion of their product to cycle trail users. These include cultural tourism product and a wide range of nature-based, adventure and other activities.²⁶



1,591

Businesses providing facilities and services for Great Rides users



795

Official Cycle Trail partners

Business offering	#
Accommodation on/near the trail	1,078
Food and beverage services on/near the trail	781
Bike hire	155
Guiding/guided tours	123
Bike shuttle/other transport to/from the trail	135
Other activities commonly packaged with, or promoted to, visitors alongside your trail (e.g. vineyard, golf club, museum)	345
Other facilities or services (e.g. petrol stations)	344

NEW ENTERPRISE

Data provided by the 200 businesses that participated in the Trail Stakeholder survey indicates that 94 had been established since the opening of the nearby trail. While fewer than one in five had been established **solely** because of the trail, the trail had been a factor in the formation of 75 percent of these new businesses.²⁷



businesses were established after the Cycle Trail opened

Operating Area	
Commercial accommodation	52%
Cycle hire	38%
Cycle transport/shuttle services	36%
Specialised cycle tours	18%
Food and beverage services	14%
Other transport services	11%
General sightseeing/tours	7%
Visitor information services	6%
Visitor activities or attractions	4%
Other	11%

REASON FOR BUSINESS ESTABLISHMENT



16%

Cycle Trail was the only reason business was established

25%
main reason

35%
one of the reasons

25%
not a factor

ENTERPRISE DEVELOPMENT

It follows that 106 (or just over half of all businesses responding to the Trail Stakeholder survey) had been established prior to the opening of the nearby cycle trail. Two-thirds of these businesses had expanded/added new services subsequently, in most cases (solely or partly) **because of** the cycle trail.²⁸



106 businesses pre-dated the Cycle Trail

Operating Area	
Commercial accommodation	43%
Food and beverage services	35%
Cycle hire	21%
Cycle transport/shuttle services	18%
Specialised cycle tours	17%
Other transport services	13%
Visitor activities or attractions	12%
Visitor information services	9%
General sightseeing/tours	8%
Other	14%

Area of Expansion	
Commercial accommodation	31%
Cycle hire	27%
Cycle transport/shuttle services	27%
Food and beverage services	26%
Specialised cycle tours	19%
Other transport services	14%
General sightseeing/tours	10%
Visitor information services	10%
Visitor activities or attractions	10%
Other	23%

BUSINESS EXPANSION



66%

Have expanded or added new services



26%

Expanded/added services solely because of the Cycle Trail

59% partly because of the Cycle Trail

16% not because of the Cycle Trail

ENTERPRISE DEVELOPMENT CONT.

Asked about the impacts of the cycle trail, the majority of businesses established prior to the cycle trail pointed to a positive contribution in relation to the number of customers served and income/turnover generated. Almost 40 percent had seen an increase in average customer expenditure and almost half a positive contribution to their bottom line. As an indicator of flow-on effects, 60 percent of businesses also indicated that their own expenditure had increased.²⁹

IMPACT OF TRAIL

(of the businesses that pre-dated the Cycle Trail)



72%

Increased number of
customers served by the business



38%

Increased average
spend per customer



64%

Income/turnover
generated by business



60%

Expenditure by business



49%

Business' profit

EMPLOYMENT

Data from businesses participating in the Trail Stakeholder survey indicates that cycle trail-related businesses employ an average of 4.4 full-time and 3.3 part-time staff. If extrapolated to the almost 1,600 businesses identified by Trail Managers, this would equate to approximately 7,000 full-time and more than 5,000 part-time staff. More than half of trail-related businesses operate with some seasonality of labour force (employing more people at certain times of year than others).³⁰



IMPACT OF CYCLE TRAILS ON ESTABLISHED BUSINESSES

24%
Increased the number of full-time staff
(+2.9 full-time staff on average)

28%
Increased the number of part-time staff
(+2.8 full-time staff on average)

	All Seasonal Businesses	Established	New
Full-time staff	Average of staff employed		
Peak season	7.7	9.9	5.1
Off-peak season	4.7	6.3	2.9
Part-time staff	Average of staff employed		
Peak season	5.9	7.1	4.4
Off-peak season	3.2	4.2	1.9

A typical peak season encompasses Dec-Mar, with Nov and Apr shouldered.

REPORTED IMPACT ON WIDER REGION

A total of 53 representatives of Chambers of Commerce and other local business groups, Territorial Authorities and Economic Development Agencies/Regional Tourism Organisations responded to the Trail Stakeholder survey. These stakeholders were asked to comment on the extent to which their local Great Ride had been a factor in drawing people to their region to live, work, study and/or play. Feedback indicates that the Great Rides are a significant drawcard for visitors to the regions and that they also play an important role in attracting people to live and do business or invest in the regions.³¹

% WHO BELIEVE THE GREAT RIDES OF NZ ARE AN IMPORTANT FACTOR IN...



91%

attracting visitors
to the area



47%

attracting people to
live in the area



8%

attracting people to
study in the area



62%

attracting people to do
business or invest in the area

A man and a woman are riding bicycles on a beach. The man is on the left, wearing a white helmet and a light-colored long-sleeved shirt. The woman is on the right, wearing a white helmet and a red long-sleeved shirt. They are both smiling and looking towards the right. The background is a bright, sandy beach with a clear sky. The entire image is overlaid with a semi-transparent blue filter.

APPENDICES

EVALUATION FRAMEWORK

The Ngā Haerenga NZ Cycle Trails Evaluation Framework aligns with:

- NZ Treasury Living Standards Framework^a
- Ngā Haerenga NZ Cycle Trails aims and MBIE Cost Benefit Analysis (CBA) used to evaluate outcomes^b
- Department of Conservation Heritage & Visitor Strategy^c
- Waka Kotahi NZ Transport Agency Arataki^d

Overarching evaluation objective:

To assess the contribution made by Ngā Haerenga NZ Cycle Trails to Aotearoa New Zealand and the communities in which the 22 Great Rides are located.

Evaluation Question: How has use of the New Zealand Cycle Trails changed?

Indicator	Measure	Data Source	Baseline
Trail usage	Number of trips using the NZCT	Trail counter data	1,985,600 trips (YE Feb 2020)
Relationship between trips taken and funds invested	Number of trips relative to funds invested (by all parties)	Trail manager (income & expenditure)	To be developed

^a <https://www.treasury.govt.nz/information-and-services/nz-economy/higher-living-standards/our-living-standards-framework>
^b <https://www.mbie.govt.nz/immigration-and-tourism/tourism/tourism-funding/nga-haerenga-the-new-zealand-cycle-trail/> and <https://www.mbie.govt.nz/dmsdocument/1248-nz-cycle-trail-evaluation-report-2016-pdf>
^c <https://www.doc.govt.nz/heritage-and-visitor-strategy>
^d <https://www.nzta.govt.nz/assets/planning-and-investment/arataki/docs/arataki-at-a-glance-august-2020.pdf>

EVALUATION FRAMEWORK CONT.

Evaluation Question: To what extent does the NZCT contribute to <u>Natural</u> Capital?			
Indicator	Measure	Data Source	Baseline
Trail users have an exceptional experience ^e	Proportion of users rating their overall satisfaction 9 or 10 out of 10	Trail user survey	74.9% (YE Dec 2020)
Trail users recommend the NZCT to others ^f	Net Promoter Score ^g	Trail user survey	76.7 (YE Dec 2020)
Trail users better understand New Zealand's natural environment	Proportion of users reporting greater understanding as a consequence of their experience	Trail user survey	To be developed
Trail users better understand New Zealand's cultural heritage	Proportion of users reporting greater understanding as a consequence of their experience	Trail user survey	To be developed
Trail users value New Zealand's natural environment	Proportion of users reporting greater appreciation as a consequence of their experience	Trail user survey	To be developed
Trail users value New Zealand's cultural heritage	Proportion of users reporting greater appreciation as a consequence of their experience	Trail user survey	To be developed
Trail users are motivated to contribute to conservation	Proportion of users reporting an intention to contribute as a result of their experience	Trail user survey	To be developed
The environment is protected / regenerated	Number of native trees planted Kms of waterway fenced Traps laid for pests (#)	Trail manager data	To be developed
Commuter use of the NZCT (i.e. active transport) ^g	Number of commuting trail trips AND total kms travelled for commuting purposes	Counter data and trail user survey data	To be calculated using data available

^e Is also an indicator of contribution to Social and Human Capital.

^f Is also an indicator of contribution to Social and Human Capital.

^g Also contributes to Human Capital.

EVALUATION FRAMEWORK CONT.

Evaluation Question: To what extent does the NZCT contribute to <u>Social Capital</u> ?			
Indicator	Measure	Data Source	Baseline
Trail usage by local residents	Number of trips taken by NZ residents (national-level measure) AND number of trips taken by local residents (regional measure)	Trail counter data in combination with trail user survey data	To be calculated using data available
Community support for the NZCT	<p>Proportion of local stakeholders that agrees/ agrees strongly that:</p> <ul style="list-style-type: none"> the NZCT is accessible of value to the community 'owned' by the community a source of pride for the community creating a greater understanding of the area's natural environment creating a greater understanding of the area's cultural heritage improving overall quality of life contributing to the identity of (community) making (community) a more vibrant/appealing place to live a catalyst for community development/investment 	Trail stakeholder survey	To be developed
Inclusiveness	<p>Number of trips taken by trail users reporting a disability</p> <p>Number of trips taken by currently under-represented population groups (including Māori, Pasifika)</p>	Trail user survey data	To be developed ^h
Local funding/ support	Resources secured locally (cash and in-kind contributions, including volunteer hours)	Trail manager (income & expenditure)	To be developed

EVALUATION FRAMEWORK CONT.

Evaluation Question: To what extent does the NZCT contribute to <u>Human Capital</u> ?			
Indicator	Measure	Data Source	Baseline
Total value of social benefits	MBIE cost-benefit analysis	Various	\$12.0m (2015)
Value of health benefit	Health benefit attributable to trail use (based on \$0.325 per km cycled, net of displacement ^l)	Counter data, trail user survey data and NZTA data	To be calculated using data available
Safety cost ^k	Cost of injury and death on the NZCT (based on incidents/accidents reported to/known by Trail Managers)	Trail manager (reported injuries and deaths) and MOT data	To be developed
Reported health and safety issues/adverse experience by trail users ^m	Proportion of trail users reporting health and safety issues/adverse experiences	Trail user survey data	To be developed
Benefits felt by trail users	Proportion of trail users reporting felt physical health, mental health and social group benefits	Trail user survey data	To be developed

^l NZTA Economic Evaluation Manual, 2016

^k It was initially intended that the social cost of road crashes and injuries (Ministry of Transport (2016)) be applied to fatalities and injuries occurring on Ngā Haerenga. However this proved problematic given the incompleteness of the data available to Trail Managers and the difficulties of interpreting this data. It was decided that the measurement of safety cost would be reconsidered for future evaluation.

^m Propose to align with relevant Department of Conservation question – visitors reporting concerns/adverse experiences relating to confidence, safety, lack of preparation, injury, illness, exhaustion etc.

EVALUATION FRAMEWORK CONT.

Evaluation Question: To what extent does the NZCT contribute to <u>Financial and Physical</u> Capital?			
Indicator	Measure	Data Source	Baseline
Cost to benefit ratio	MBIE cost-benefit analysis	<i>Various</i>	\$1:\$3.55 (2016)
Total of economic benefits	MBIE cost-benefit analysis	Various	\$37.4m (2015)
Visitor nights attributable to NZCT	Number of people visiting primarily to use the NZCT x nights in country/region (nb: differential national- and regional-level analyses)	Trail counter data in combination with trail user survey data	To be calculated
Visitor expenditure attributable to NZCT	Average expenditure per person per night by people visiting primarily to use the NZCT	Trail user survey	\$215.40 (two years to Dec 2020)
Enterprise attributable to NZCT	Number of businesses self-identifying as providers of products and services to Trail users	Trail manager survey	To be developed
Employment attributable to NZCT	Number of FTEs attributable to the NZCT	Stakeholder survey	To be developed
Revenue attributable to the NZCT	Proportion and dollar value of business revenue attributable to the NZCT	Stakeholder survey	To be developed

SURVEY METHODOLOGY

SURVEY OF TRAIL USERS

An ongoing survey of Trail Users is undertaken using a survey application developed for Ngā Haerenga NZ Cycle Trails and the 22 Great Rides that make up the network. This uses a combination of methods to access a sample that is as broadly representative of trail users as possible. These include: -

- Emailed invitations sent directly to an event database;
- Collection of contact names by staff/volunteers, with follow-up distribution of personalised email invitations;
- Promotion of public web links via newsletters, social media, on-site QR codes and posters, hand-outs of pamphlets and business cards; and
- Promotion of the survey via a growing number of local businesses and official trail partners.

For the year ending June 2021, n=4,140 of n=6,012 responses (or 69% of the total) resulted from personalised invitations sent to an identified trail user, with the balance contributed via public web link (for example, hosted on the trail website, promoted via QR code posted on-site or a local business). The response rate for those sent a personalised email invitation was 66%.

The data used for the current evaluation is based on survey samples of n=6012 trail users in the year ending June 2021 and n=5089 trail users in the preceding year (year ending June 2020).

A new set of measures was developed to support the evaluation framework and the relevant questions were added to the Trail User survey from 1 May 2021. The measures which draw on this data (e.g. inclusiveness, felt benefits) are based on a smaller survey sample (approximately n=600, but varying by measure).

SURVEY OF TRAIL MANAGERS

A new survey of Trail Managers was designed to capture the data required for this evaluation and the survey was undertaken online in May and June 2021.

Survey invitations were emailed to each nominated trail manager on 20 May 2021. The email included a personal link through which the Trail Manager clicked to complete the survey.

By end June 2021, all Trail Managers had completed the survey (n=22 or a 100% response rate).

SURVEY OF TRAIL STAKEHOLDERS

A new survey of Community Stakeholders was also designed to support the evaluation and the survey was undertaken online in June and early July 2021.

Initial stakeholder databases were compiled by Trail Managers, with contacts requested across a range of stakeholder groups. These included: -

- Iwi, hapū and marae groups;
- Businesses providing products/services for people using the trails;
- Chambers of Commerce and other local business/sector groups;
- Territorial Authorities/Local Government Agencies and entities such as Economic Development Agencies and Regional Tourism Organisations;
- Schools and tertiary education providers;
- Competitive and social sporting and recreation clubs/groups;
- Charitable trusts; and
- Other community groups.

Each Trail Manager was also provided with a public web link which they could share and through which other stakeholders could opt in to complete the survey.

A final total of n=1,374 stakeholder contacts were emailed with a personal invitation to complete the online survey, of whom n=369 had responded by the survey closing date of 5 July 2021 (a response rate of 27%).

INDIVIDUAL TRAIL COUNTS

	PEDESTRIANS			CYCLISTS			ALL USERS		
	YE Feb 20	YE Jun 21	YoY Change	YE Feb 20	YE Jun 21	YoY Change	YE Feb 20	YE Jun 21	YoY Change
Twin Coast Cycle Trail	35,668	29,269	-18%	30,949	33,395	8%	66,617	62,665	-6%
Hauraki Rail Trail	29,271	31,055	6%	44,790	51,008	14%	74,061	82,063	11%
Waikato River Trail	16,146	20,251	25%	14,428	18,272	27%	30,574	38,523	26%
Te Ara Ahi	36,751	37,197	1%	55,343	62,003	12%	92,094	99,200	8%
Motu Trails	6,363	7,066	11%	10,884	14,660	35%	17,248	21,726	26%
Timber Trail	3,612	4,269	18%	8,863	14,043	58%	12,476	18,313	47%
Great Lake Trail	22,256	23,999	8%	21,010	23,388	11%	43,266	47,387	10%
Mountains to Sea Trail	6,077	5,217	-14%	14,728	26,177	78%	20,805	31,394	51%
Hawke's Bay Trail	219,736	212,690	-3%	188,037	214,070	14%	407,773	426,760	5%
Remutaka Cycle Trail	145,318	235,383	62%	73,451	81,523	11%	218,769	316,905	45%
Queen Charlotte Track	21,871	17,811	-19%	5,054	5,145	2%	26,925	22,956	-15%
Coppermine Trail	29,801	37,276	25%	51,870	64,997	25%	81,671	102,272	25%
Tasman's Great Taste Trail	85,407	115,606	35%	182,506	199,873	10%	267,913	315,478	18%
St James Cycle Trail	-	2,024	-	1,822	4,114	126%	1,822	6,139	237%
Old Ghost Road	6,343	5,663	-11%	5,173	6,277	21%	11,516	11,940	4%
West Coast Wilderness Trail	32,637	33,903	4%	30,568	39,284	29%	63,204	73,187	16%
Alps 2 Ocean	49,399	44,442	-10%	19,505	24,092	24%	68,904	68,534	-1%
Otago Central Rail Trail	21,848	25,722	18%	46,427	54,659	18%	68,275	80,380	18%
Roxburgh Trail	10,531	10,974	4%	9,417	12,613	34%	19,949	23,586	18%
Clutha Gold Trail	4,568	5,373	18%	5,993	7,386	23%	10,562	12,759	21%
Queenstown Trails	239,935	189,762	-21%	131,038	126,512	-3%	370,973	316,274	-15%
Around the Mountains	3,358	3,962	18%	3,319	4,261	28%	6,677	8,222	23%
ALL TRAILS	1,026,897	1,098,913	7%	955,175	1,087,748	14%	1,982,072	2,186,662	10%

