CYCLE TOURISM INSIGHTS

RESEARCH REPORT

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Ngā Haerenga
NEW ZEALAND CYCLE TRAILS

angus
& ASSOCIATES

INSIGHTS SUMMARY

This is an insight-driven analysis of opportunities to further develop cycle tourism and increase its value to communities across New Zealand. It will inform the ongoing development and optimisation of Ngā Haerenga New Zealand Cycle Trails and supporting infrastructure/activity. Consideration is given to the current and potential market, as well as the supply side perspective.

Three types of information informed the analysis – existing secondary information about cycle tourism, consultation with industry stakeholders, and primary market research.

Secondary research

- Definitions vary, but for this research cycle tourism is defined as travelling away from your usual place of residence (on a day or multi-day trip), with cycling being an important or notable part of the trip. It can include cycle touring, bike-packing, cycling to a specific destination or attraction while on your trip (e.g. wineries), mountain biking (e.g. on a trail or at a park), urban cycling, and bike-related events.
- Key market trends are increasing use of e-bikes (but also supply shortages), and the COVID-19 pandemic fueling interest in cycling and cycle tourism activity.
- Three main approaches to market segmentation are evident - by activity type, by frequency, and by demographic/psychographic profile. There is no evidence of segmentation by *value* of cyclist.

Consultation

- The current cycle tourism market is varied, but is characterised by older cyclists, engaged and social cyclists, cyclists keen on comfort, and growth in use of e-bikes.
- The COVID-19 pandemic has caused an increase in participation in, and spend on, cycle tourism by domestic visitors, and accelerated demand for e-bikes and trail services. While some investments are being made to service the demand, some demand is unfulfilled or not serviced as well as it could be - often due to supply constraints (accommodation, eateries, toilets, bikes, bike mechanics and other labour etc..).
- There is an opportunity to position the network of cycle trails in New Zealand as world-leading, with the network in the lower half of the South Island seen as especially impressive.
- There is also an opportunity to better promote introductory options (easy and/or short), which give a taste of the cycle trail experience in an accessible way. Many other opportunities to promote the trail infrastructure further or in new ways also exist (e.g. as linear destinations, as a low/no carbon tourism option, and the health and well being benefits of using them).

INSIGHTS SUMMARY CONT.

- Consideration could be given to evolving the Great Rides brand to widen the accessibility of the portfolio (e.g. Great Day Rides, Great Urban Rides), however there is also concern that there is too much variance in standard of trails in the current portfolio (i.e. some are not high quality and/or particularly appealing).
- Markets poised for growth include those with disabilities and their friends/families, bike-packers, and international visitors (once risks relating to the COVID-19 pandemic pass).
- As demand grows, there are more cyclists with low cycling skills and/or low fitness levels on trails and (anecdotally) this has led to an increase in accidents and safety concerns – this situation is exacerbated by growth in the use of e-bikes (which are faster, and heavier).
- There is a growing need around maintenance of trails – periodical tasks such as clearing vegetation as trails 'age', and because with more traffic comes more wear and tear (e.g. a poor surface, rubbish). If not addressed users may not return or not try other trails, and the current reliance on volunteer effort to assist with this may not be sustainable.
- Congestion (especially on shared use tracks) is starting to cause problems and conflict – some trails have blind corners, poor signage and insufficient budget to address these issues – this raises the question of whether trails that have congestion evident should be improved to better cater for demand or whether demand should be more explicitly managed.
- A shortage of cycle mechanics is a barrier to growth, and this is exacerbated by the rise of e-bikes as they are more technical to fix and require specialist help if they breakdown.

Consumer Survey

- Survey respondents are considered in the cycle tourism market if they travelled for leisure in the past year, and if they either undertook a cycle tourism activity in the past year (the 'current market') or if they stated an interest in doing a cycle tourism activity in the next two years (the 'prospective market'). This equates to approximately 46% of the New Zealand adult population and 35% of the Australian adult population. While the sample includes a prospective element, there may be further potential outside the market (for example those interested in an active holiday, or those interested in hiking). The cycle tourism market is broader than the Ngā Haerenga New Zealand Cycle Trails market however as it includes a range of cycling activities (e.g. use of mountain bike parks, and urban cycling).
- Survey response was considered by a range of variables – for example the current market versus the potential market; the Australian market versus the domestic market, frequent cyclists versus infrequent cyclists; older people versus younger people etc.. The variables where most difference in response is evident tend to be age/life stage, income, and cycling experience.

INSIGHTS SUMMARY CONT.

- While resting/relaxing and spending time with friends/family are the most common reasons for taking leisure trips whether in the cycle tourism market or not, the domestic cycle tourism market is more likely to be motivated by the opportunity to explore unique places, and the Australian cycle tourism market by the opportunity to escape and disconnect. Both markets are more likely than the overall populations to be motivated by the opportunity to be active outdoors in nature, to enjoy local food and wine/beer, and to experience an adventure or take a special journey. The Australian market is more likely than the domestic market to want to travel in comfort and indulge.
- In the past year only 39% of the Australian cycle tourism market travelled interstate or overseas for leisure, and until COVID-19 vaccines are more prevalent, and/or the pandemic has passed, it may be challenging for New Zealand to extract the full potential of this market. Having said this, three in five Australians in the cycle tourism market find New Zealand highly appealing, and two in five say they are very likely to travel to New Zealand for leisure in the next three years.
- Three in five of those in the domestic and Australian cycle tourism market have done a cycle tourism activity in the past year – most commonly cycling in an urban area. Multi-day trips are amongst the least common cycling activities done. For those who haven't participated in cycle tourism recently, interest is strongest for urban cycling, cycling around destinations/attractions, cycling in regional/national parks, and for single day trail rides. Again, there is low interest in multi-day rides compared to other types of cycle tourism activities (and especially in the Australian market).
- Bike ownership/access sits at approximately three quarters for the *current* cycle tourism markets. It is more of a barrier for the *prospective* markets as incidence is lower. This is also notable in terms of the growth potential of cycle tourism because supply issues are also reportedly constraining growth at present. The prospective markets also have a lower level of fitness (self-assessed) than the current market. This combined with the more limited opportunity to gain cycling fitness means that cycle tourism activities may be of greater interest if perceived as 'not too demanding', or if there are options available for those who are less fit.
- The current cycle tourism markets are much more likely to cycle frequently than the prospective markets. Cycling frequency is also higher than the overall markets for those aged 50-59 years, males, those with a household income over $160,000 per year, couples with children no longer at home, and those that have easy access to a bike. More than one third of the prospective cycle tourism markets have not ridden a bike for a long time and only approximately one in ten are cycling monthly or more frequently. This has important implications in terms of marketing, product options, and safety.
- Over 40% of the domestic and Australian cycle tourism markets (and over 50% of the *current* cycle tourism markets) plan to do a cycle tourism activity in the next year. For those not currently planning something, there is significant interest in doing a cycle tourism activity in the next three years.
- Cycle tourism drivers are similar for the domestic and Australian *current* cycle tourism markets. One in three are motivated by the cycle tourism experience itself, and/or appeal of the natural environment/scenery. Being active on a trip, the convenience of a cycling activity, and wanting a challenge/adventure are also important drivers. Similar drivers are evident in the *prospective* markets but doing something new and interest in local history/culture are more prominent.

INSIGHTS SUMMARY CONT.

- The main barriers for participating in cycle tourism activities are the weather being too unpredictable, not being fit enough/seeing cycling as too physically demanding, not having a suitable bike (especially for the *prospective* markets), and not wanting to ride on the road. Compared to the Australian cycle tourism market, the domestic market is more likely to perceive cycle tourism activities as too expensive. Not having enough time is more of a barrier to younger people and those with higher incomes, while confidence is more of a barrier for females.
- At present, difficulty obtaining bookings and crowded trails are not perceived as significant participation barriers, but both registered as more significant barriers to the current than prospective markets, likely relating to the recent cycle tourism experience of this group.
- The cycle tourism markets' awareness and knowledge of the Ngā Haerenga New Zealand Cycle Trails brand is relatively low. The Great Rides brand has higher awareness but still sits at only about one in four of the domestic cycle tourism market and one in five of the Australian cycle tourism market. Those aged 70+, and couples with children no longer at home, are more likely to have heard of Great Rides than the market as a whole, while regular and frequent cyclists are more likely to have heard of both Great Rides and Ngā Haerenga New Zealand Cycle Trails than the market as a whole. Brand recognition is also lower than for Great Walks, but this comparison does highlight potential. Linking or collaborating in some way with this or similar brands such as Tohu Whenua could offer benefits in terms of tapping into national networks, and combined story telling or cross-selling opportunities.
- 62% of the domestic cycle tourism market and 34% of the Australian cycle tourism market have cycled or walked on a Great Ride (an average of 2.3 different trails for the domestic market with Waikato River Trails most common, and 1.8 for the Australian market with Queenstown Trail most common). Amongst these groups there is an opportunity for 'repeat business' and cross-selling of other trails.
- Two thirds of both the domestic and Australian cycle tourism markets are interested in doing some form of cycle tourism on Ngā Haerenga New Zealand Cycle Trails in the next three years. Interest is highest in the domestic market for frequent cyclists (52% very interested), and in the Australian market for longer distance cyclists (50% very interested). Those who have been on a Ngā Haerenga Great Rides New Zealand trail before are also more likely than the markets as a whole to be very interested. With 22 Great Rides to choose from targeting this group (assuming they enjoyed their experience) is an opportunity to grow value and optimise the cyclists' market potential.
- For those very or somewhat interested in doing a cycle tourism activity on Ngā Haerenga New Zealand Cycle Trails in the next three years, the ideal experience would most commonly last only half a day, and for seven in ten, the ideal trail grade is grade 1 or 2 (easier trails). Just one quarter would ideally undertake a two day or longer experience. This underscores the importance of promoting trail sections as well as 'complete' trails. For those who would ideally do a multi-day ride, the most preferred accommodation in the domestic market is bed & breakfasts, Airbnb and motels, and in the Australian market is hotels, holiday parks, and bed & breakfasts. Having partial support during the experience is the most preferred way to experience the cycle trails although two in five in the domestic market want to cycle completely independently, and one third of the Australian market want full support (all logistics including a guide).

INSIGHTS SUMMARY CONT.

- By segment, younger riders are more likely than the markets as a whole to want to cycle on Ngā Haerenga New Zealand Cycle Trails with a group of friends, and to cycle on an intermediate or higher grade trail, while those with household incomes over $160,000 have the highest level of interest compared with other segments. Regular/frequent cyclists are the most likely to want to cycle for more than a day, and to undertake more challenging rides, while those who don't cycle frequently tend to want to undertake short and easy experiences with a rented bike.
- No significant differences are evident in the gender split of the domestic and Australian cycle tourism markets compared to the total population, however, in the Australian market, females are under-represented in the *current* market. Likewise, no significant differences are evident in the geographical spread of each country's cycle tourism market compared to the total population.
- A higher proportion of the prospective market is disabled than the current market – suggesting that in order to grow the market, more may need to be done to cater to people with disabilities.
- Survey results are not generally significantly different by ethnicity. However, while sample sizes are small, interest in Ngā Haerenga New Zealand Cycle Trails is notably higher amongst Indian respondents than for the total domestic and Australian cycle tourism markets. Likewise, new migrants (those arriving in the past 10 years) also have a higher level of interest (but not significantly so). About 10% of the domestic cycle tourism market were not born in New Zealand and arrived to live here in the past 10 years. It is likely that there are opportunities to nurture interest from people of a wider range of ethnicities (including Māori), and amongst new migrants.

Expenditure insights

- Curently, the highest value user types are those using trails for four or more days, Australians, and e-bike users, while those generating the least value are those aged under 30 and bike packers.
- The expenditure information presented does not take into account the lifetime value of trail user type (e.g. one user type may be more likely to visit trails repeatedly than others). If this could be factored in, the view of where highest value currently lies may differ.

KEY TAKEAWAYS

Established market trends and opportunities for future growth

While there is evidence that cycle tourism activity in New Zealand was growing prior to the emergence of the COVID-19 pandemic, growth in activity since has been significant, as it has been in other countries. While demand is not evenly spread across trails, operators, and regions, it is clear cycle tourism has an important future as part of New Zealand's tourism offering, and that the continued maturation of the offering brings both further growth opportunities and pressures.

While significant border restrictions remain in place (and likely also when they're not), the domestic market will remain the mainstay of cycle tourism activity in New Zealand. Complementing this, the Australian cycle tourism market presents a notable opportunity given the establishment of the trans-Tasman bubble, because Australians can't currently travel anywhere else, because of the size of the market, and because New Zealand has appealing cycle tourism products. The Australian market is also more likely than the domestic market to want to 'travel in comfort and indulge'. The potential of this market is likely hindered at present though due to COVID-19 outbreaks and a series of bubble 'pauses'.

Within the domestic and Australian cycle tourism markets, which overall are relatively similar, there are trends and opportunities. Current trends include increasing use of and demand for e-bikes, the 'silver dollar' being a prominent market (over 50's who are active, with moderate to high disposable incomes and who are time rich), and spend by domestic visitors increasing following the main COVID-19 lockdown in early 2020.

As well as further growth from current trends, there are opportunities to widen the market. An additional opportunity suggested by the research insights is further promotion and packaging of shorter ride options (day, half day, 1-2 hours). While this type of option exists, the demand for it is significant and knowledge appears limited. Younger people, and those from high income households, are more likely than the overall markets to cite lack of time as a barrier to participating in cycle tourism activities, so promoting shorter options is likely to help grow these markets (and lessen reliance on other groups). Further, interest in multi-day rides is also low for prospective markets. This combined with relatively low fitness levels means that short (and easy) options are likely to appeal to this group as well. Exposing the trail infrastructure to a more diverse market in terms age and experience will grow the value cycle tourism generates from a wider spectrum of the population. 'Hub-and-spoke' trails could also suit these groups well. E-bikes are also likely to be of interest to all of these groups, although availability and cost may be an issue.

A further opportunity is to focus promotions on the nature and scenic aspect of cycle trails, more so that the cycling activity itself. This is likely to extend the appeal of cycle tourism to a wider group – these are important drivers for the prospective market, where cycling might be the means to see things, but not the main attraction. Likewise, while interest in local history/culture is lower on the list of drivers of cycle tourism, it is higher for the *prospective* market, and there is an opportunity to elevate this in terms of the trails' role in providing an historic or cultural experience. In the same way, positioning a trail alongside the other things to do nearby and presenting them more so as a combined experience (a 'corridor', or 'linear destination' type approach) is also likely to widen the appeal as interest is strong in cycling around destinations/attractions, and low for multi-day rides (i.e. showcase the trail experience as *one part of* a holiday/break, alongside nearby tourism experiences, unique accommodation, historic sites/landmarks, popular eateries and 'meet the producer' type operations).

KEY TAKEAWAYS

Established market trends and opportunities for future growth cont.

New trails

While the research did not specifically explore if there should be new trails, where any new trails should be, and/or what they should be, the insights generated do provide a sense of what any new trails should look like. Best prospects (in terms of potential popularity and based on tapping into the wider cycle tourism market) are likely to be:

- Trails in urban areas or that include a specific destination or attraction (based on the interests of the prospective cycle tourism market)
- Trails that take in notable natural environments and/or outstanding scenery (based on common drivers of cycle tourism)
- Trails that are not overly physically demanding, that are fully off-road, that are relatively short, and that are unlikely to be subject to a lot of poor weather (based on overcoming common barriers to participating in cycle tourism)
- Trails that take only a part day or day to complete (or that have easily accessible sections of this length), and that are grade 1 or grade 2 (based on the cycle tourism market's ideal Ngā Haerenga New Zealand Cycle Trails experience)
- Trails that are well serviced by cafes, comfortable accommodation options, bike hire, transport links etc. (based on consultation themes)

Māori

Māori are underrepresented in the domestic cycle tourism market. Māori make up 11% of the market, but account for almost 17% of New Zealand's total population. Further, Māori make up just 4% of cycle trail users based on initial data from the Ngā Haerenga New Zealand Cycle Trails trail user survey, indicating conversion from the wider cycle tourism market is poor. In terms of the potential of this market, there are few significant differences compared to the total domestic cycle tourism market. However, Māori are less likely to be frequent cyclists (at least weekly).

In terms of barriers to cycle tourism participation, the only significant differences from the total domestic cycle tourism market are a lower incidence of thinking that the logistics are too complicated, and a lower incidence of wanting to do other tourism activities first. While not significantly different to the total domestic cycle tourism market, a higher proportion of Māori indicate that they don't have a suitable bike, that they don't have a suitable way to transport their bike/s, that the trails are too busy/crowded, and that their children are too young.

KEY TAKEAWAYS CONT.

Opportunities to increase the *value* of cycle tourism to New Zealand/communities

Cycle tourism has potential to generate economic, social, cultural and environmental benefits for New Zealand/communities. Benefit is already occurring, but further potential exists to increase the value of cycle tourism at both local and national level. Anecdotally, cycle tourism can be a more palatable form of tourism for host communities than some other tourism activity (as it is "more relatable"), but social license can also be lost, and resistance to trail construction also occurs. Ensuring cycle tourism activity is delivering value for communities, and effectively communicating how this is the case, (as well as mitigating negative impacts/perceptions) is important in maintaining this.

By consumer segment it is difficult to say outright that any one segment offers more value than another. A bike-packer completing five trails and camping could be more, or less, valuable than a family completing one trail - because of the money spent (and the businesses it is spent with), the impact that they have on the environment, the way they interact with local people, the extent to which they learn about and appreciate the local area, and more. Further, even if all economic, social, cultural and environmental levers are optimised, value over trip, or value over lifetime, (rather than value over ride) may be a better gauge in terms of what segments to target. Equally, if thinking about the value a cycle tour operator generates, as an example, they may negotiate lower than rack rates for accommodation, but be more valuable than individual bookings for an accommodation operator because they buy multiple rooms, bring business year-round, promote the trail and area in order to win business etc.. A 'portfolio approach' may provide a good basis for optimal value.

Some specific opportunities for increasing the value of cycle tourism are apparent from the research insights. These include:

- Engaging a broader range of New Zealanders in cycle tourism (for example by age, disability, and ethnic group) to extend the benefit the activity brings to individuals and New Zealand society in terms of the physical and mental health of participants. Cycle tourism is a 'feel good' activity that can be engaged in on multiple occasions so this benefit can grow over time. This means younger people are a particularly important target, and while it remains difficult to travel overseas it is likely to be a good time to engage with this group, potentially developing some lifelong riders. Likewise, similar benefits will accrue by nurturing participation amongst those with lower incomes and/or lower fitness levels, who are less engaged at present.
- Engaging a broad range of New Zealanders (younger, older, high/low income etc..) in a range of cycle tourism behaviour (short/long ride, luxury/budget), urban/remote) also produces economic value because it results in a multi-dimensional market. Operators can be less reliant on one or a few groups for the sustainability of their business.
- As cycle tourism increases in popularity in New Zealand, its environmental value could increase because in many cases it is likely to be a substitute for higher carbon footprint tourism (e.g. cycling around vineyards rather than being driven around vineyards, or cycling between towns rather than travelling by vehicle). This will benefit New Zealand and host communities because carbon emissions from tourism activity will be lower overall. While the importance of low/no carbon tourism activities to the cycle tourism market is relatively low at present, there is an opportunity to elevate this further.

KEY TAKEAWAYS CONT.

Opportunities to increase the *value* of cycle tourism to New Zealand/communities cont.

- Cross-selling other trails/trail sections, to those that have been on a trail will increase the value each cycle tourist generates, and is likely to be more efficient than reaching new cyclists. Those that have been on a Ngā Haerenga Great Rides New Zealand trail have been on an average of two, meaning there remains good scope to attract this group to cycle on others. This might be helped by more clearly communicating what is unique to each trail and how it offers a different experience to others. In some cases this is not immediately clear – for example some trails have similar or nondescript names (Mountains to Sea and Alps 2 Ocean; Queenstown Trail).

- Anecdotally there is demand for more comfortable accommodation to be available on/near some Ngā Haerenga New Zealand Cycle Trails. Facilitating this is likely to result in an increase in the economic value of cycle tourists in those areas. However, lower cost options would ideally remain available so that these trails are accessible to a variety of visitors. If options are geared to those with higher budgets it could impact on social license and reduce the net benefit.

- Where practical, growing 'hub and spoke' cycle tourism experiences (where a cycle tourist is based in one place and completes multiple day rides from that location) is an opportunity to increase value – it means accommodation operators have fewer room turnovers, which is likely to be more economic – and more time with guests, increasing social benefits, it may be easier to combine cycling with other activities in the region (which could result in a longer overall length of stay or widen the appeal), and it may be more efficient to utilise town facilities/resources than provide them in more rural locations (e.g. water supply, mobile coverage, fresh food supplies, electricity, labour, cycling/bike-related services). Many of these points are aligned with the concept of 'slow tourism'.

- In some cases, increasing the value of cycle tourism may mean better balancing the benefits and impacts of cycle tourism activity. Some trails can support more traffic, while others are largely at capacity (especially in terms of supporting services). Optimisation and better value may mean a changed or reduced visitor mix, visitors behaving more sustainably, focusing on growing the off-peak season only, ensuring locals can access services relatively easily etc.. It may also mean that promotional activity is targeted to trails and times of year that can more readily absorb activity without creating pressures.

- Value can also be increased by encouraging more local people to cycle on their nearby trails. This activity provides health benefits, helps to ensure locals are advocates for the area and good hosts to visiting cyclists, may result in greater willingness to help maintain trails, and may also foster an interest in cycle tourism options further afield.

KEY TAKEAWAYS CONT.

Future development of the Ngā Haerenga New Zealand Cycle Trails organisation

Ngā Haerenga New Zealand Cycle Trails currently has 22 member Great Rides. While there is scope to grow this membership to include other cycle trails that would benefit from an association with Ngā Haerenga New Zealand Cycle Trails (e.g. newly constructed trails, trails on private land, day rides or urban rides) it is very important that they are of a standard that is fitting of the Ngā Haerenga Great Rides New Zealand brand, as already there is a view that some of the existing Great Rides are not as well formed, serviced, and/or appealing as they should be. In this vein, clear trail standards, and maintenance of these, is important for the ongoing appeal and value of the brand.

Alternatively, additional brands or quality levels could be introduced that serve to grow the reach and appeal of the product offer, and grow revenue from membership fees, without de-positioning existing members. This approach could allow for a broadening of the membership base to include other cycle tourism infrastructure such as mountain bike parks. It also has precedent in terms of the 20 Heartland Rides that link Great Rides with urban centres and transport hubs.

With any changes, it needs to be clear what benefits there would be for the Ngā Haerenga New Zealand Cycle Trails organisation, for existing members and partners, and for the new members, as well as what risks this may bring. For example, widening the membership may bring increased member revenue that can support additional marketing initiatives or showcase Great Rides to a wider base of potential users. Widening the membership could also 'cheapen' the brand or confuse consumers unless well managed with appropriate resource, or threaten relationships with existing members if they are not supportive.

The direction and future structure is perhaps best guided by the vision for Ngā Haerenga New Zealand Cycle Trails' vision, which is currently centered around creating jobs, creating a high-quality and competitive tourism asset, providing economic development opportunities in regional areas, and maximising the recreational/health benefits for New Zealanders. Any changes would need to sit comfortably against this vision unless there is an argument to revise it.

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INTRODUCTION

Ngā Haerenga New Zealand Cycle Trails comprises 22 Great Rides and a series of connecting Heartland Rides and is managed by a national organisation operating under the direction of a board. Ngā Haerenga New Zealand Cycle Trails' purpose is to grow New Zealand through sustainable and outstanding cycle experiences: revitalising regions through new and improved cycling infrastructure, high-value tourism and job creation while, at the same time, fostering a life-long love of recreation amongst people living locally.

In the year ending June 2021, almost 2.19 million trips were taken across the Ngā Haerenga New Zealand Cycle Trails network. 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[1].

Following this period of rapid growth and with a challenging new phase of recovery ahead for New Zealand and its tourism sector following the emergence of COVID-19, Ngā Haerenga New Zealand Cycle Trails commissioned Angus & Associates to provide independent insight-driven analysis of trends and opportunities to further develop cycle tourism and to increase its value to communities across New Zealand. This fresh perspective and the insights generated will inform the ongoing development of Ngā Haerenga New Zealand Cycle Trails and supporting infrastructure/activity (including opportunities to strengthen collaboration with local government and commercial operators). This is with the view that the design of the network is best optimised if undertaken with an understanding of the characteristics, needs, and expectations of the market the Trails have potential to serve.

[1] Annual Evaluation of Ngā Haerenga New Zealand Cycle Trails 2021

RESEARCH OBJECTIVES

The research has three primary objectives: -

1. To aid the national organisation in the optimisation of the Ngā Haerenga New Zealand Cycle Trails network – and supporting products/services – by shedding light on established market trends and opportunities for future growth (including specific markets/market segments and product categories in which untapped demand exists);
2. To identify opportunities through which to increase the **value** of cycle tourism to New Zealand and its communities (considering value in a holistic sense – economic, social, cultural and environmental); and
3. To provide guidance on the future development of Ngā Haerenga New Zealand Cycle Trails as a membership organisation (for example, by identifying an appropriate structure and directions for membership growth).

To address these objectives both a demand- and supply-side focus has been taken, as shown below.

Demand	**(1) Current Market** Insights on the scale and characteristics of current demand, based on type/s of experience (e.g. events, cycle touring, day rides and urban cycling, mountain biking etc..), equipment used (e.g. road bike, mountain bike, e-bike, etc.), motivational segments (relaxation, fitness, social group interaction etc.. and including new segments emerging/developing in response to COVID-19), demographic/life stage/psychographic profiles, and overall customer value (taking into account economic contribution and other measures of value).
	(2) Potential Market Insights on areas of untapped demand and their scale – e.g. new market segments or new product opportunities in existing market segments – and any barriers for those aspiring to (but not currently participating in) cycle tourism activities (e.g. gaps relating to knowledge, necessary skills, access, availability of appropriate cycling equipment etc..).
Supply	Insights on key opportunities for Ngā Haerenga New Zealand Cycle Trails and other organisations across the sector: for example, opportunities for collaboration on new product development or supporting services, for new campaign activity, or for membership growth. At the same time, pinpointing any supply-side constraints that will need to be addressed if the sector is to take advantage of opportunities identified.

METHODOLOGY AND RESEARCH APPROACH

1. Design phase

Secondary research and consultation with Ngā Haerenga NZ Cycle Trails and stakeholders

This involved identifying and reviewing existing data and research on cycle tourism in New Zealand and internationally, including approaches to market segmentation. This process was largely completed through desktop research.

Consultation was also undertaken with a variety of stakeholders including trail managers, operators, other Ngā Haerenga New Zealand Cycle Trails partners, and selected industry leaders and strategists, to help identify sources of data/research, and to gather input to help inform the primary research design. Consultation was undertaken via email correspondence, by phone, face-to-face, and by video call.

Findings from the secondary research have been provided to Ngā Haerenga New Zealand Cycle Trails in a separate document. A summary of these findings is included in the next section. Insights derived from the consultation process are outlined in the subsequent section.

2. New market research

New primary research with current/prospective cycle tourism consumers in NZ and Australia

Sample Structure and Size

The primary research is focused on the New Zealand and Australian cycle tourism markets as it remains unclear how quickly international visitor markets will return to New Zealand. It is likely that the New Zealand cycle tourism market will be constrained to domestic and Australian consumers for some time to come, and that these markets will be dominant in the longer term.

Sampling from the Dynata online panel took place in June 2021 and involved starting with population-representative samples from residents of each country and gaining final online survey samples of n=750 current/prospective cycle tourism consumers in each market. This sample size allows for sub-group analysis. Each market has an equal focus given one is more certain but with untapped opportunities (the New Zealand domestic market), and one is less certain but with perhaps the most significant potential upside (the Australian market).

Qualifying Criteria

Survey participants include both the current market for cycle tourism (those that have participated in cycle tourism in the past 12 months) and the potential market (those that haven't participated recently but are interested in doing so in the next two years). Further, all respondents are at least 18 years old and have travelled for leisure in the past year (ensuring some pre-disposition towards travel if they haven't recently participated in cycle tourism).

At the design phase it was suggested that an interest in holidays with active, nature/outdoor or adventure/challenge characteristics be included as part of the survey qualifying criteria, but this was revised because incidence of this is high and it would have resulted in a less targeted sample.

METHODOLOGY AND RESEARCH APPROACH CONT.

2. New market research cont.

Questionnaire

The survey content was divided into sections as outlined below:

- Screening questions (to determine if the respondent qualified for the survey and which market they are in)
- General questions – sporting/recreational equipment owned, holiday motivations, level of fitness, cycling experience and frequency
- Current market questions – type/nature of cycle tourism experience(s) had and planned for future, barriers to participating, motivations for participation
- Potential market questions – type/nature of cycle tourism experiences interested in and any planned for future, barriers to participating
- Ngā Haerenga New Zealand Cycle Trails specific questions – brand awareness/perceptions, level/nature of interest in doing a Great Ride/more Great Rides
- Demographics

Ultimately, the survey was designed to help inform how the economic, social, cultural and environmental value of cycle tourism to New Zealand and communities can be increased - for example, by identifying specific markets/market segments and product categories in which untapped demand exists, and providing insight as to how experiences can be enhanced in terms of the value generated.

SECONDARY RESEARCH INSIGHTS

SECONDARY RESEARCH SUMMARY

Defining Cycle Tourism

As the specific activities included in cycle tourism are not universally agreed, there are a range of definitions used. Taking into account the commonalities of various definitions, and the starting point stated in the projects' proposal, the working definition of cycle tourism for the research was stated as:

CYCLE TOURISM - WORKING DEFINITION:

Cycle tourism is activity that involves an individual travelling away from their usual place of residence, either as a day trip or overnight, and where cycling is a fundamental or significant aspect of the trip.

Cycle-related tourism activity includes, but is not limited to, cycle touring, bike-packing, riding on cycle trails, mountain biking, cycling to specific destinations or attractions, urban cycling and attending bike-related events.

Cycle Tourism Market Trends

Published and stakeholder views of current cycle tourism trends, or trends that may impact cycle tourism activity include:

- **Increasing use of e-bikes, but also supply shortages**
- **The COVID-19 pandemic is fuelling interest in cycling, and cycle tourism activity (especially in regard to domestic visitors)**
- **In some situations, availability of suitable accommodation on/near trails is constraining growth**
- **Increasing interest in bike packing**

Market Segmentation

Approaches to cycle tourism market segmentation are varied and broad. Some organisations take a holistic approach, while others focus more specifically on recreational cycling. Three main types of segmentation were identified (by activity type, by frequency, and by demographic/psychographic profile). No evidence was found of segmentation of the cycle tourism market by cyclist *value*.

SECONDARY RESEARCH SUMMARY CONT.

New Zealand Cycle Tourism Research

Data and research on cycle tourism in New Zealand is limited. Most research looks at a segment of the market (e.g. a specific cycle trail, bike-packing, or recreational cycling), rather than the market in its entirety. Some information is outdated, particularly national level research.

Cycle Tourism Critical Success Factors

Key success factors for growing the cycle tourism market were cited from several sources, one of which is shown below. While this example relates to mountain biking, the points made are likely to be more widely applicable.

Tourism NT. Mountain Biking in the Northern Territory. 2020.
Essential features of a world class mountain biking network
A high quality, sustainable trail network with good signage and mapping enabling users to navigate the network easily
Diversity of trail types and styles for users of all abilities, featuring a broad range of difficulty levels with good opportunities for rider challenge and progression. A typical split across a network is 20% beginner, 50% intermediate and 30% advanced level trails
Sufficient riding opportunities to fill 2 to 3 days - around 60km to 100km of trails
A trail network that evolves over time to entice return visits
High quality pre-trip information
Sustainable management of trails and infrastructure supported by a MTB-friendly local community

Initiatives to Support/Grow Cycle Tourism

Several programmes and schemes employed to develop and/or support cycle tourism in a country or destination were outlined (e.g. engagement and partnership programmes, welcome schemes, quality standards and cycle hubs). While elements of these are present in New Zealand, a more co-ordinated or expanded approach could be beneficial.

CONSULTATION INSIGHTS

CONSULTATION INSIGHTS SUMMARY

A variety of stakeholders including trail managers, operators, other Ngā Haerenga New Zealand Cycle Trails partners, and selected industry leaders and strategists were consulted to help identify sources of cycle tourism data/research, and to gather input to inform the primary research design. Through this process, many insights were collected, as outlined and summarised in this section. Many of the stakeholders consulted have unique expertise/knowledge and so some insights have been included even if the view of only one stakeholder. This does mean that some caution should be applied though in terms of the weight given to any individual point.

What are the characteristics of the current market?

"Some want a map, some want an App."

Stakeholders commonly described:

- The 'silver dollar' – over 50 year olds who are active, with moderate to high disposable incomes and time rich
- Engaged cycle tourists (keen to participate in local activities, understand the history, and absorb the scenery)
- Active relaxers – cycle tourists that want to retain home comforts while travelling – for example by using comfortable accommodation, and accessing good quality cafes and dining experiences, shuttle services and e-bikes
- A lot more demand for and use of e-bikes than in the recent past
- Social travellers – cyclists often experiencing trails in groups of friends or families, and often wanting to include vineyard, cafe or brewery stops

To a lesser extent stakeholders mentioned:

- Mountain bikers in the over 30's age range interested in the more technical trails and long-distance challenges
- An event-oriented user group who are motivated by cycling events on trails or that are located nearby
- Some younger cyclists - that may be riding cycle trails in lieu of international travel
- The opportunity for cycle trails to be inclusive is being missed – with equipment and technology on their side, cyclists with disabilities can more easily access trails, but they are sometimes limited by factors such as track width and accessible ancillary services (e.g. good information about what the toilet facilities are)
- Spikes in demand at weekends and over holiday periods
- An increase in 'non-traditional' family groups (adult children with their partners and their parents, grandparents with grandchildren etc..) – for bigger groups using an operator private departures are often arranged
- Domestic visitors bringing their own bikes, which are harder for operators to manage because of the variety of bikes, and bike conditions
- The *range* of users on trails – it is so varied in terms of profile and motivation

CONSULTATION INSIGHTS SUMMARY CONT.

"Even the ute drivers have bikes on the back."

How has the COVID-19 pandemic impacted cycle trails?

Cycle tourism activity following the onset of the COVID-19 pandemic has differed. Common observations include:

- A significant increase in participation – "it's gone ballistic" – some operators have grown their revenue greatly
- Acceleration of the high demand for e-bikes, tours and trail services, putting this infrastructure under notable pressure
- The domestic market has invested in e-bikes; for those wanting to *hire* an e-bike the currently limited wholesale/retail supply has put some people off proceeding with their plans, or meant they have deferred their trail experience until an e-bike is available (meaning the high level of demand has not always been able to be capitalised on immediately) – operators have hundreds of thousands of dollars worth of e-bikes on order and are experiencing significant delays in receiving them (e.g. 18 months)
- Other tourism businesses are investing in cycle tourism more than previously – many campervan hires for example now have bike rack options
- Spend by domestic cyclists has (anecdotally) increased - potentially due to a change in the visitor mix, with 'holiday makers' accounting for a bigger proportion of the market (and more motivated to 'treat' themselves given inability to travel overseas, and given their activeness on the trip, also as they can see the impact of their spend), and 'enthusiasts' a relatively smaller proportion; also hireage of e-bikes costs more than standard bikes
- Some smaller businesses have not been able to sustain the optimal opening hours – with it being harder to find employees, and there being no international business which impacts scheduling and viability (domestic only is not enough in some situations) – this is impacting the experience

What are the untapped opportunities?

Many insights were offered about development opportunities for cycle trails, and these include:

- More accommodation being available on or close to some trails will enable greater participation – accommodation offerings currently limit the use of some trails (this can be at all, by 'comfort' level, or by the configuration/facilities)
- Cycle tourists would generally enjoy more services along/near trails such as cafes or refreshment stops - lack of services is an issue in some areas (both in terms of enjoyment/comfort, and maximizing the economic opportunity)
- Finishing the existing network to world class standards – there is an opportunity to position the network as world-leading
- Promoting shorter and/or easy trails/trail sections as introductory options for families and others - to give those with interest but no experience using trails a taste of the experience in a welcoming way, and graduate them through to multiday trails (in future this will also suit trade options like series tour groups as well)
- More promotion of safe cycling behaviour is essential to reduce accidents - many people are participating on faster/heavier/wider e-bikes and don't know how to handle them, and more people with low cycling skills or low levels of fitness are participating as well

CONSULTATION INSIGHTS SUMMARY CONT.

"The three most important things are the bed, the evening meal, and the quality of the bike."

What are the untapped opportunities? (cont.)

- Promoting the positive aspects of cycle trails as a central piece - for example, their proximity to each other, the diversity of trails that exist, the health and well being benefits of using them (being in nature, being active, taking a break, spending quality time with others etc..), that they are 'linear destinations', and the low/no carbon travel cycle tourism supports
- Evolving the 'Great Rides' brand to include a wider and more accessible range of cycling opportunities – for example urban cycle trails (Great *Urban* Rides?) or day rides (Great *Day* Rides?) included as part of the portfolio (these could be waterfront settings e.g. Tamaki Drive in Auckland, around urban parks e.g. Hagley Park in Christchurch etc.. – due to the COVID-19 pandemic cities also need development support), or this could also include the development of *sealed* multi-day trails for a new, easier, and different Great Ride experience
- More purposefully welcoming cyclists with disabilities on to cycle trails by consulting with this sector, providing detailed information about trails, improving on barriers to participation/inconsistencies (e.g. standard trail/bridge width), and recognising the extent of the opportunity that exists to tap into the 'purple pound'
- Reframe communication away from cycle tourism (which can be perceived as something largely for enthusiasts), to a softer 'holiday activity' message in order to reach a wider market (e.g. new migrants and younger people) – deliberate targeting such as images including different types of cyclists/trails may help
- Greater collaboration among key players on selling the cycle trails story, including improved information resources, and using Tourism New Zealand to help in building the collective brand, and in selling individual trails as 'products' or tapping into and aligning with campaign activity - also having representation at Crankworx and similarly aligned opportunities, to develop different markets
- There is also a cycle tourism boom internationally due to COVID-19 and there is likely to be an influx when the border opens and risks reduce (subject to infrastructure/service constraints) – the Australian opportunity is significant due to proximity of the sizeable market and the quality and accessibility of our trails. Some operators are holding significant bookings for international guests.
- There is growth in bike-packing as a sector, and considerable potential for further growth (some say 'huge' potential)
- Developing 'generational use' of cycle trails similarly to tramping (e.g. families regularly doing different tramps and children continuing to over their lifetime)

What are the barriers/risks to increasing cycle tourism participation?

Stakeholders raised the following points when discussing limitations to cycle tourism activity:

- Not enough accommodation, or not enough accommodation of the 'right type'/configuration is limiting participation on some trails (e.g. five couples wanting a luxury experience is hard to arrange in many locations and results in shuttles taking guests further away from the trails) – anecdotally demand for comfortable accommodation often can't be met
- More charging stations are going to be required on/near trails as the use of e-bikes grows (and demand is also likely to grow for battery hire, battery 'libraries' etc.. as flying with e-bike batteries domestically and internationally is not possible)

CONSULTATION INSIGHTS SUMMARY CONT.

(on recreational cyclists) "This group is in need of engagement, but the hardest to engage with."

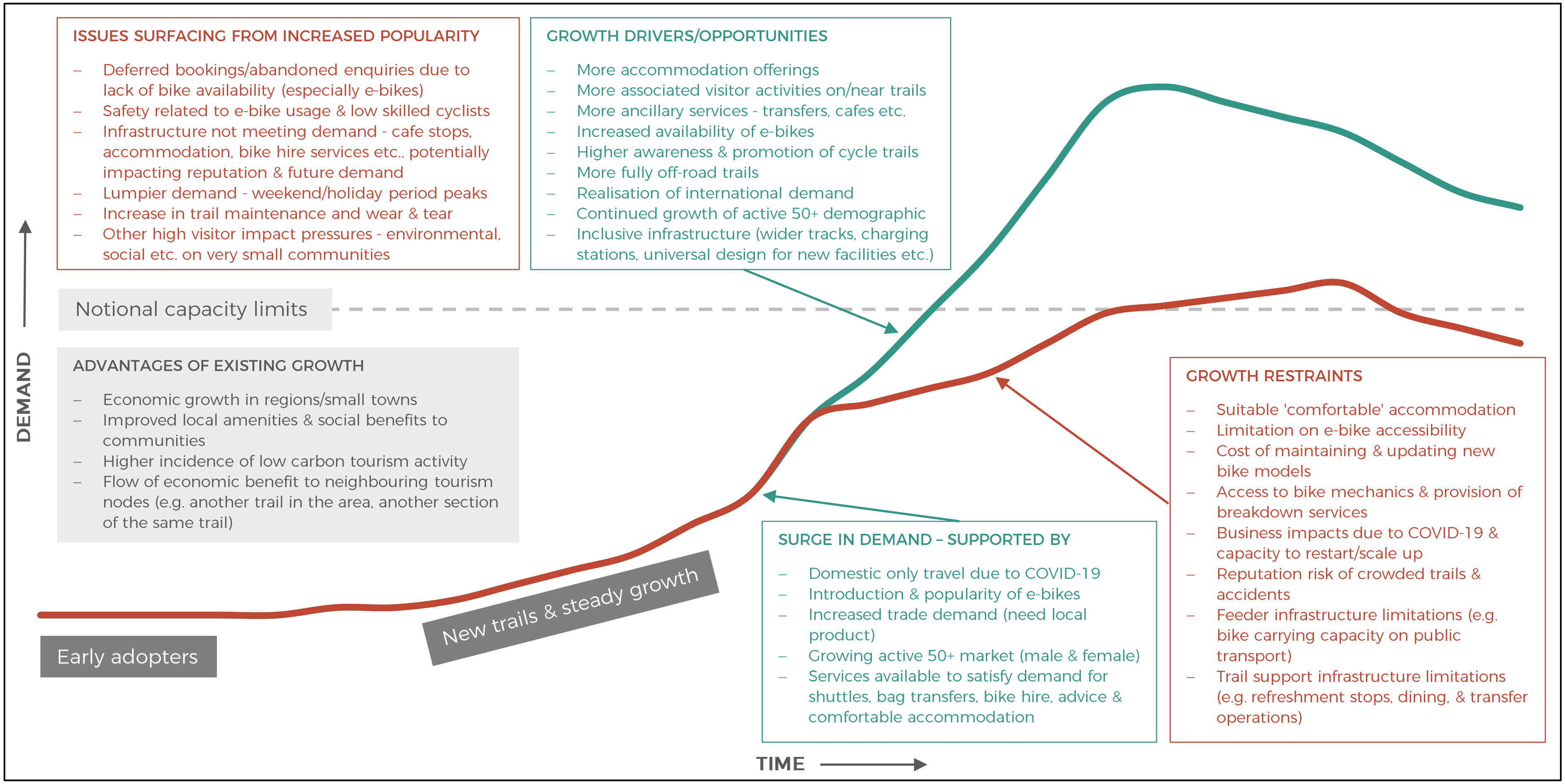
What are the barriers/risks to increasing cycle tourism participation? (cont.)

- More cyclists with low cycling skills and/or low fitness levels means that there has been an increase in accidents and safety concerns – this is exacerbated by the prevalence of e-bikes and more traffic on trails – some hire them to 'fix' the fitness/skill issue (as they are heavier, faster, and give access to areas some cyclists otherwise wouldn't be in) – accidents are a cost and can lead to an adverse experience and low levels of advocacy. There is no body for recreational cyclists representing their interests, providing education, promoting the activity etc.. A 'Learn-to' initiative like Parks Canada's Learn-to Camp initiative may help.[1]
- 'Under grading' of trails means cyclists aren't always selecting the most appropriate trail for their ability resulting in a poor experience
- A lot of volunteer effort has been put in to build trails – there is concern that long term this may not be a sustainable approach, and this could impact on the trails as a product. Similarly, there is a growing need around maintenance of trails – periodical tasks such as clearing vegetation as trails 'age', and because with more traffic comes more wear and tear (e.g. poor surface, rubbish) – if not addressed users may not return, or try other trails.
- The trails are not as accessible as they could be for those with disabilities and this reduces the opportunity for this market (and their families and friends) to participate (e.g. information provision, width, step design) – universal design and a focus on inclusivity will benefit everyone
- Congestion (especially on shared use tracks) is starting to cause problems and conflict – some trails have blind corners, poor signage and insufficient budget to address these issues – this raises the question of whether trails that have congestion evident should be improved to better cater for demand or whether demand should be more explicitly managed (for example by introducing pricing, or using accommodation availability as a proxy for capacity management)
- Increased popularity may mean increased prices for limited services – this in time may price out more of the domestic market and impact social license if accessibility is seen as an international only or luxury experience, or mean that international visitors can't secure bookings unless booking well in advance
- A shortage of cycle mechanics is a barrier to growth, and this is exacerbated by the rise of e-bikes as they are more technical to fix and require specialist help if they breakdown – also because e-bikes that would normally have been sold off are being kept in use longer by operators (until the supply shortage eases)
- Due to the seasonal and rural nature of many cycle trail experiences some accommodation and service providers are involved as a retirement or ancillary income option. This has an impact on service quality and quality of facilities in some cases. Some close for several months despite there being demand for the service (even operating at weekends only during the low season would help).
- There is variety in the quality and appeal of the Great Rides and this variance is a risk for the Great Rides brand; similarly, on-road sections are increasingly undesirable (as more off-road trail options become available, and as bike and vehicle traffic increases)
- Many operators give personalised service and can't upscale easily, this in an environment where trade is seeking domestic opportunities (e.g. House of Travel)
- Reliable and good value transport options being available are important for the success of one-way trails, as well as other trails where users/potential users want to complete just part of the journey. Clear and easily accessible Information about these options is important. Related to this (and other supporting services), current labour shortages in popular locations make this support challenging to provide at times, limiting operations and growth.

[1] See: https://www.pc.gc.ca/en/serapprocher-connect/ltc-dlc

CONSULTATION INSIGHTS SUMMARY - NOTIONAL PRODUCT LIFE CYCLE

The chart below illustrates and draws together many of the points made on the previous pages by plotting the insights against a notional product life cycle for cycle trails in New Zealand. The life cycle has two potential scenarios plotted, based on whether growth is restrained by capacity limits or whether growth continues unrestrained.

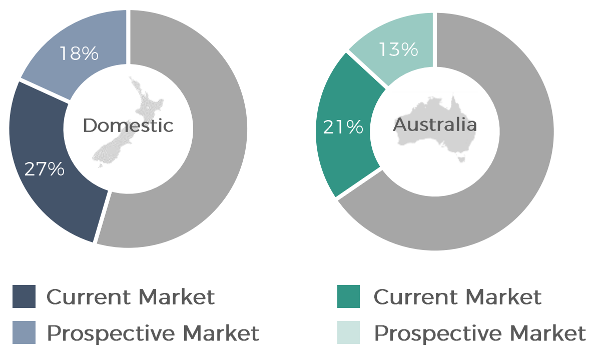


CONSUMER INSIGHTS

CYCLE TOURISM MARKET INCIDENCE

Of those that completed the survey screening process, 46% of New Zealanders and 35% of Australians qualified for and went on to complete the survey. The cycle tourism market (as defined by the qualifying criteria applied[1]), therefore makes up this proportion of each country's adult population. Based on current adult populations, this equates to 1.8m New Zealanders and 6.9m Australians.

The cycle tourism market can be further broken down into the current market (those who have undertaken a cycle tourism activity in the past year) and the prospective market (those who haven't undertaken a cycle tourism activity in the past year but are interested in doing a cycle tourism activity in the next two years). The incidence of these submarkets is outlined below. In the domestic market this equates to 1.07m in the current market and 0.73m in the prospective market, and in the Australian market this equates to 4.3m in the current market and 2.6m in the prospective market.



It's unlikely that the entirety of the Australian cycle tourism market is interested in undertaking cycle tourism activities *in New Zealand*, but it is likely that there is considerable potential for New Zealand within it. In the past year only 39% of this market travelled interstate or overseas for leisure, and until COVID-19 vaccines are more prevalent, and/or the pandemic has passed, it may be challenging for New Zealand to extract the full potential of this market. Having said this, two in five Australians in the cycle tourism market indicated they are very likely to travel to New Zealand for leisure in the next three years (see Travel Characteristics section).

[1] Currently live in New Zealand or Australia, 18+ years old, have travelled for leisure in the past year, and have either undertaken a cycle tourism activity in the past year or interested in doing a cycle tourism activity in the next two years.

TRAVEL CHARACTERISTICS

TRAVEL MOTIVATORS

What tend to be your main reasons for taking leisure trips?

While travel motivations are *similar* across both populations, and regardless of whether in the cycle tourism market or not, the cycle tourism market is more likely to be motivated to undertake leisure travel for the following main reasons:

- To rest and relax (AU)
- To escape and disconnect (AU)
- To explore different places (NZ)
- To be active outdoors in nature (NZ/AU)
- To enjoy local food/wine/beer (NZ/AU)
- To experience an adventure or take a special journey (NZ/AU)
- To recover/rejuvenate (NZ/AU)

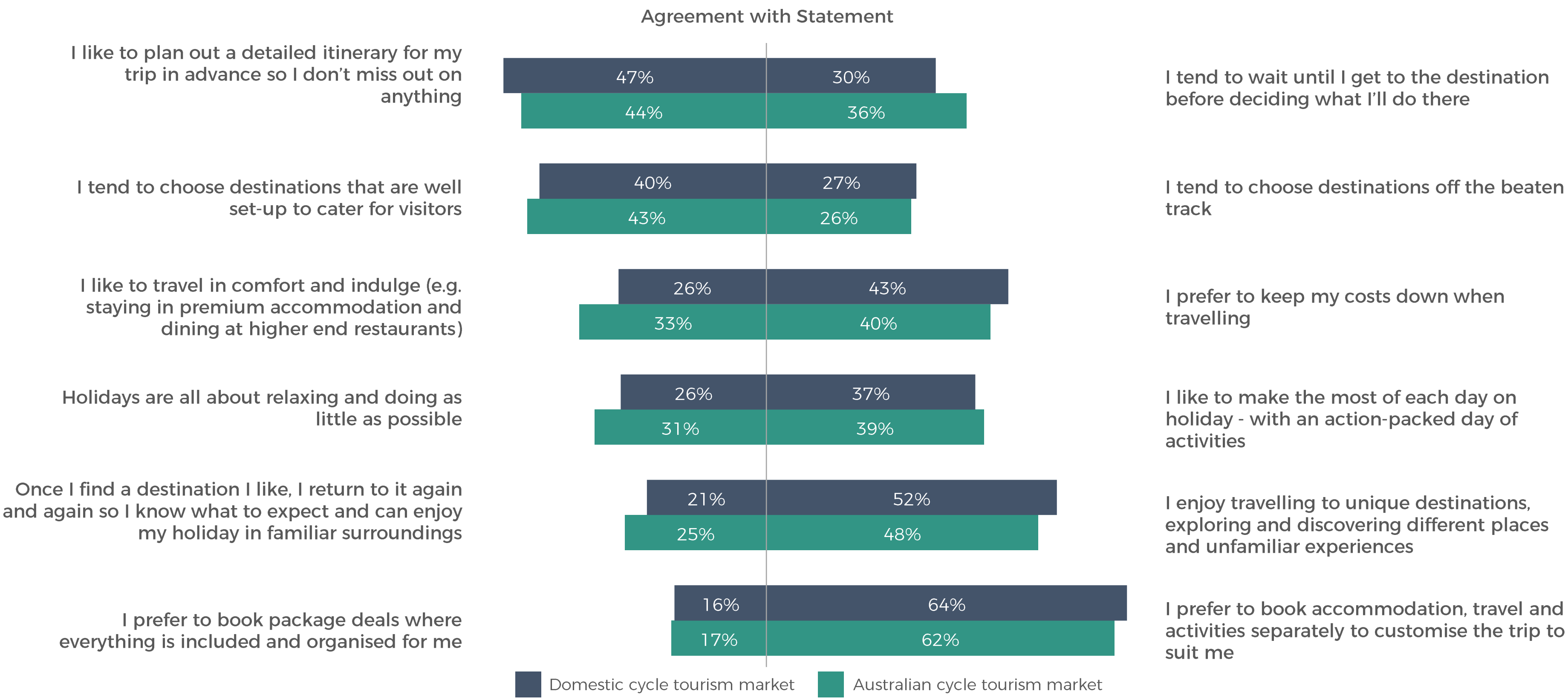
	Domestic (total pop.)	Domestic Cycle Tourism Market	Australia (total pop.)	Australian Cycle Tourism Market
To rest and relax	53%	56%	57%	62%▲
To spend time with my family, friends, or partner and create shared memories	51%	55%	43%	46%
To visit friends or family living in the region	45%	44%	35%	36%
To escape and disconnect from the routine and pressures of everyday life	29%	32%	32%	38%▲
To explore and discover uniquely different places/ experiences	26%	30%▲	24%	26%
To be active outdoors, in nature	17%	24%▲	21%	30%▲
To enjoy the local food and wine/beer	17%	20%▲	20%	25%▲
To experience an adventure, or take a special journey/route/trail	17%	22%▲	14%	18%▲
To recover/rejuvenate following a period of stress	11%	14%▲	11%	19%▲
To attend an event	16%	16%	10%	12%
To indulge in comfort and be pampered	8%	9%	12%	16%▲
To celebrate a milestone	10%	11%	10%	12%
To go somewhere and do something challenging	7%	10%▲	7%	8%
To meet new people and share experiences	7%	9%	8%	9%
To escape from winter to a warmer climate	6%	5%	9%	10%
None of the above	3%	0%▼	6%	0%▼
Base: Total Sample	n=1,649	n=752	n=2,176	n=752

▼/▲ Denotes significant difference relative to the Total Population (based on survey screening data), expressed at a 95% confidence level

TRAVEL STYLE

Thinking about the way you like to travel, select where on the scale you fit based on the extent to which you agree or disagree with each statement

The domestic and Australian cycle tourism markets tend to prefer planning the details of their trips in advance and booking trip elements separately. These markets are typically interested in exploring new and different places. with preference towards destinations well set-up for visitors and where costs can be kept down. The Australian market is more likely to want to travel in comfort and indulge, and to decide what they want to do once at their destination (rather than in advance) than is the domestic market.



NEW ZEALAND APPEAL

How appealing is New Zealand to you as a destination for a short break or holiday?

	Australian Cycle Tourism Market		
	Total	Current	Prospective
Highly Appealing	60%	62%	57%
Somewhat Appealing	30%	27%	33%
Neither appealing nor unappealing	8%	8%	8%
Somewhat unappealing	2%	2%	1%
Highly unappealing	1%	1%	1%
	n=752	n=466	n=286

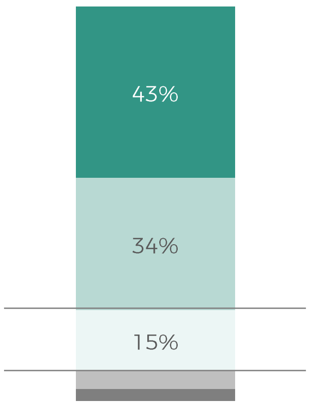
67% of females rate NZ highly appealing.

As household income increases so does the proportion rating NZ as highly appealing, but the differences are not significant.

Age and cycling frequency don't significantly impact appeal.

PROPENSITY TO VISIT NEW ZEALAND

How likely are you to travel to New Zealand for leisure, within the next three years?



	Australian Cycle Tourism Market		
	Total	Current	Prospective
Very likely	43%	48%	35%▼
Somewhat likely	34%	33%	35%
Neither likely nor unlikely	15%	13%	19%
Somewhat likely	5%	3%	7%
Very unlikely	3%	3%	4%
	n=752	n=466	n=286

As cycling frequency increases so does the proportion likely to travel to NZ. For those that cycle at least weekly, 59% are very likely to travel to NZ for leisure in the next 3 years.

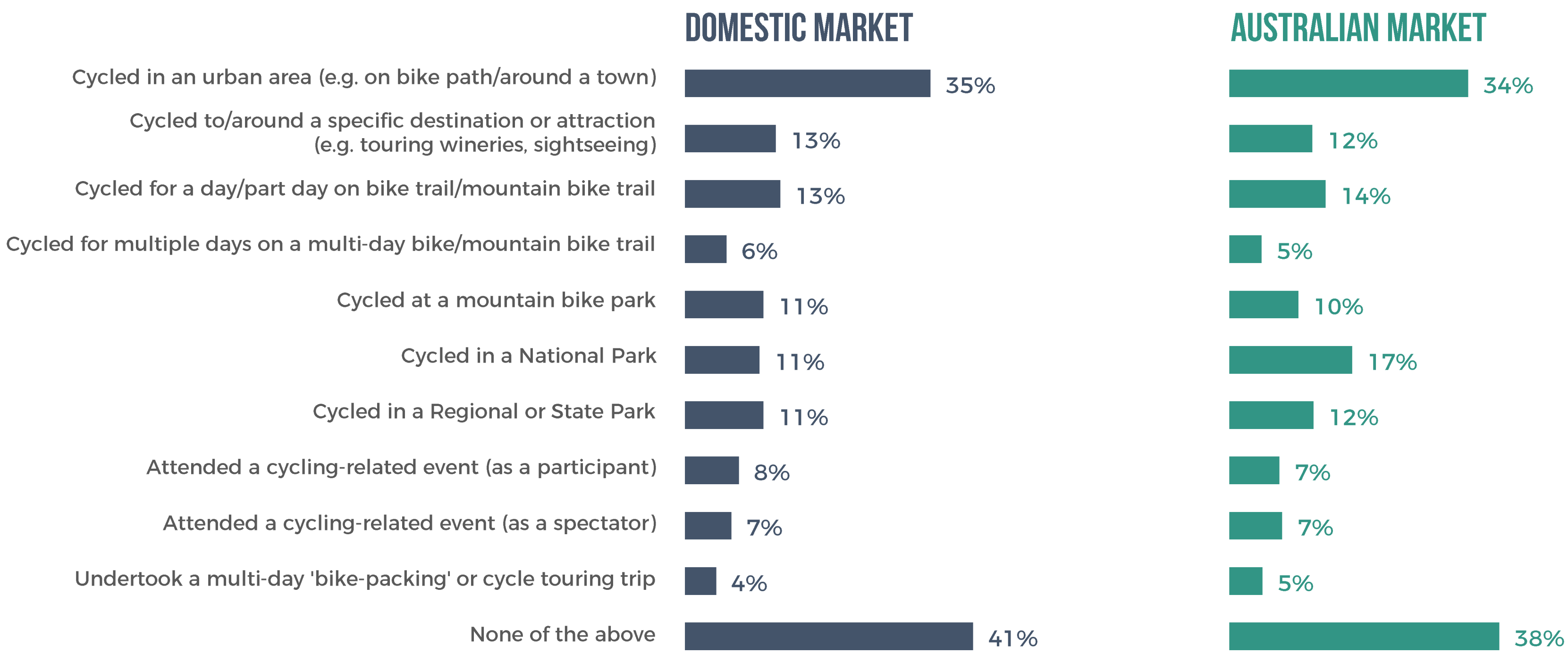
As household income increases so does the proportion likely to travel to NZ, but the differences are not significant.

Those from NSW are most likely to travel to NZ, but again, the difference from the total market is not significant.

▼/▲ *Denotes significant difference relative to the Total Australian cycle tourism market, expressed at a 95% confidence level*

CYCLE TOURISM DONE IN PAST YEAR

Which (if any) of the following cycling activities have you done in the past year, while away from your home area on a leisure trip?



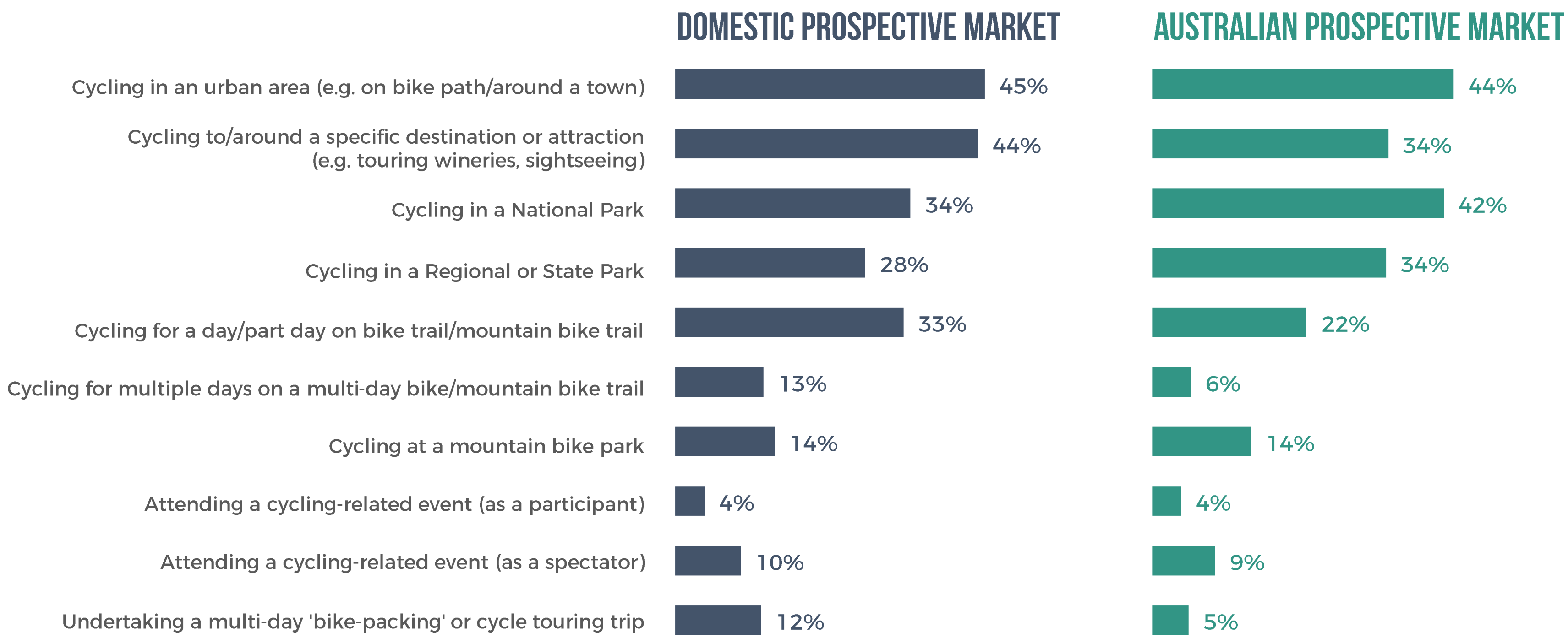
Approximately three in five of those in the cycle tourism market have done a cycle tourism activity in the past year – most commonly cycling in an urban area.

Multi-day trips (on trails or bike-packing) were amongst the least common cycling activities done, in both markets.

Base: Domestic cycle tourism market n=752; Australia cycle tourism market n=752

CYCLE TOURISM ACTIVITIES INTERESTED IN (NON-PARTICIPANTS)

Which (if any) of the following cycling activities are you interested in doing on a trip away from your home area in the next two years?



For those who haven't participated in cycle tourism at all, or recently, interest is strongest for urban cycling or cycling around destinations/attractions, cycling in regional/national parks, and for single day trail rides.

Again, there is a lower level of interest amongst both markets (but especially the Australian market) in multi-day rides compared to other types of cycle tourism activities.

Base: Domestic prospective cycle tourism market n=305; Australia prospective cycle tourism market n=286

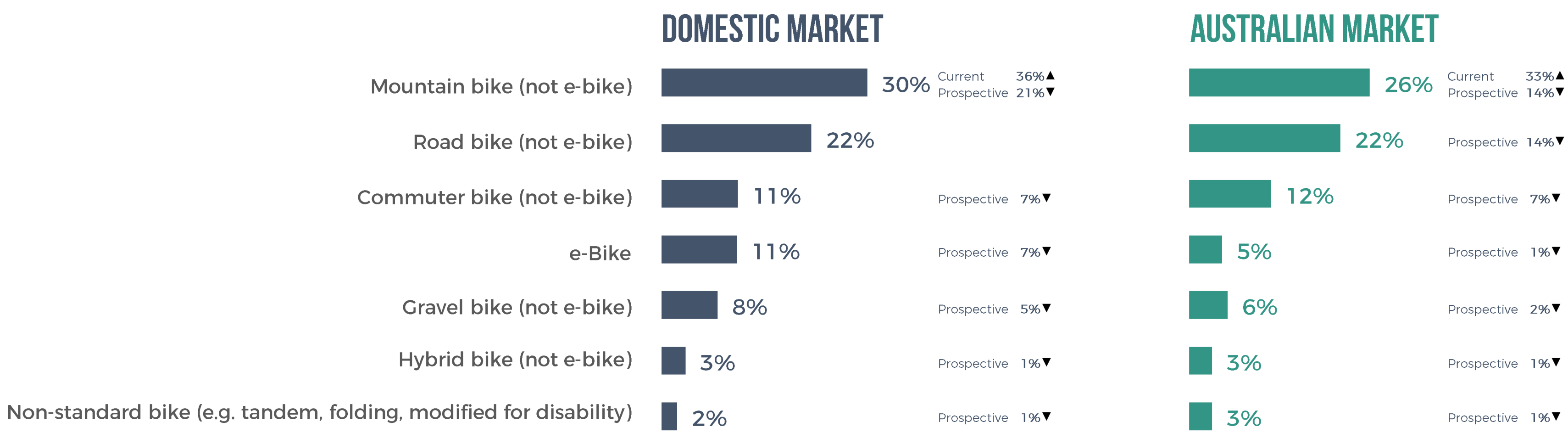
CYCLING PROFILE

BIKE OWNERSHIP/ACCESS

Which of the following do you own or have easy access to?

65% Domestic Market (own/can access a bike) → Current 76%▲ Prospective 49%▼

58% Australian Market (own/can access a bike) → Current 71%▲ Prospective 36%▼



Bike ownership/access sits at approximately three quarters for the current market. It is a potential issue for the prospective cycle tourism market as incidence is lower. This is also notable in terms of the growth potential of cycle tourism because supply issues are also reportedly constraining growth at present.

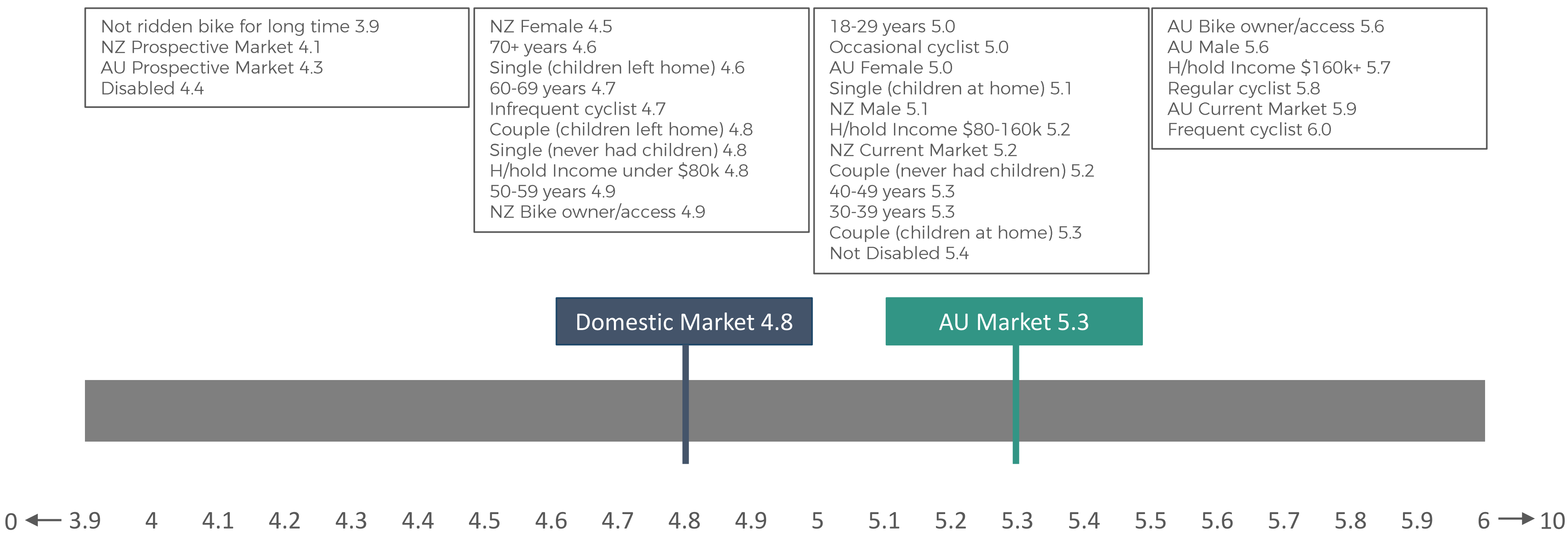
Those who own or have access to a bike are also more likely to own or have access to: a vehicle bike rack or trailer, fishing equipment, hiking equipment (AU market), a tent/camping equipment (NZ market), and a kayak or canoe (NZ market).

▼/▲ Denotes significant difference relative to the Total domestic/Australian cycle tourism market, expressed at a 95% confidence level

Base: Domestic cycle tourism market n=752; Australia cycle tourism market n=752

FITNESS

How would you rate you fitness level?
(on a scale from 0 'couch potato to 10 'professional athlete'; mid-point (5) 'regular gym-goer or similar')



Amongst the domestic and Australian cycle tourism market, self-assessed fitness is highest (based on average ratings) for regular or frequent cyclists, those with relatively high household incomes, and, amongst the Australian market, those with access to a bike, that are male, and that are in the current market.

Given the lower level of fitness amongst both the domestic and Australian prospective markets, cycle tourism activities may be of greater interest if perceived as 'not too demanding', or if there are options available for those who are less fit.

Base: Domestic cycle tourism market n=752; Australia cycle tourism market n=752

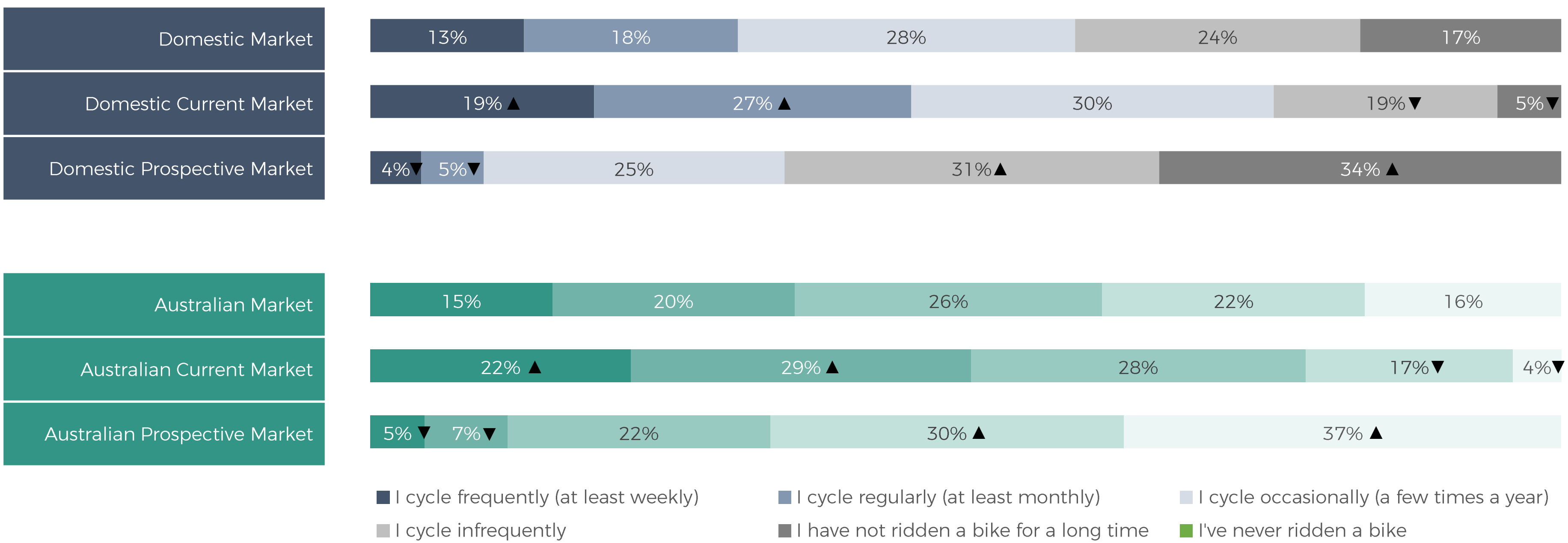
CYCLING FREQUENCY

Which of the following statements about cycling best describes you?

Both the domestic and Australian current cycle tourism markets are much more likely to cycle frequently than the prospective market.

Cycling frequency is also higher than the market as a whole for those aged 50-59 years (22% cycle at least weekly), males, those with a household income over $160,000 per year, couples with children no longer at home, and those that own (or have easy access to) a bike.

More than one third of the prospective cycle tourism market have not ridden a bike for a long time and only approximately one in ten are cycling monthly or more frequently. This has important implications in terms of marketing, product options, and safety.



▼/▲ Denotes significant difference relative to the Total domestic/Australian cycle tourism market, expressed at a 95% confidence level

Base: Domestic cycle tourism market n=752; Australia cycle tourism market n=752

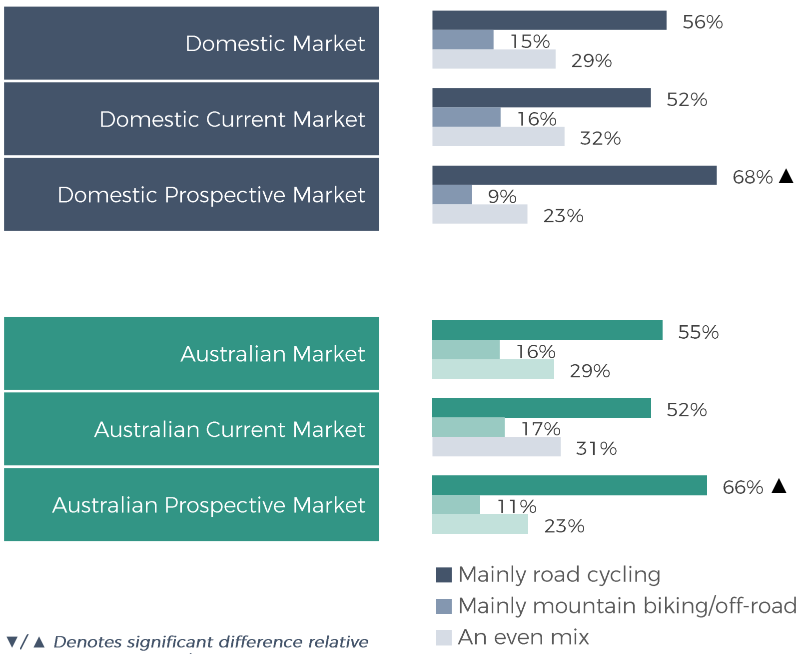
CYCLING TYPE & DISTANCE

Is your cycling...?
And, how far would you normally cycle?

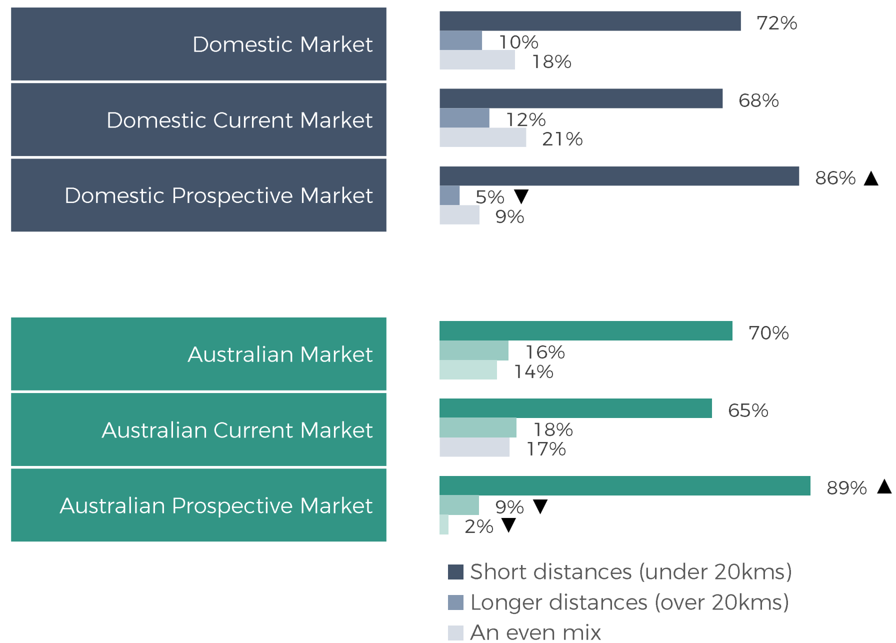
Those in the cycle tourism market who cycle occasionally (a few times a year), regularly (at least monthly), or frequently (at least weekly) were asked about the type of cycling they do and the distance they cycle.

Road cycling is more common than off-road cycling. This is especially so for the prospective market. Preference for road cycling is also higher than the market as a whole for those aged 70+. Main cycling distance tends to be under 20km, and this is more common than the market as whole for females, those with a household income under $80,000, and occasional cyclists.

CYCLING TYPE



CYCLING DISTANCE



▼/▲ Denotes significant difference relative to the Total domestic/Australian cycle tourism market, expressed at a 95% confidence level

Base: Occasional, regular or frequent cyclists: Domestic n=445; Australia n=462

ATTITUDES TOWARDS CYCLE TOURISM

PLANNED CYCLE TOURISM ACTIVITY/EXPERIENCE

CYCLE TOURISM DEFINTION USED IN SURVEY: Cycle tourism involves travelling away from your usual place of residence (on a day or multi-day trip), with cycling being an important or notable part of the trip. It can include cycle touring, bike-packing, cycling to a specific destination or attraction while on your trip (e.g. wineries), mountain biking (e.g. on a trail or at a park), urban cycling, and bike-related events.
The definition is altered from the design phase working definition - so it is simpler to read and includes examples.

Are you planning to undertake any cycle tourism activities/experiences within the next year?
If yes, what are you planning to do?

	Domestic Market			Australian Market		
	Total	Current	Prospective	Total	Current	Prospective
Yes	43%	52%	29%	40%	57%	13%
No	57%	48%	71%	60%	43%	87%
Base: Total Sample	n=752	n=447	n=305	n=752	n=466	n=286

MORE LIKELY TO HAVE CYCLE TOURISM PLANS (YES):

- AU Bike owners (49%)
- 30-39 years (48%)

LESS LIKELY TO HAVE CYCLE TOURISM PLANS (NO):

- Single with children no longer living at home (75%)
- 70+ years (72%)
- 60-69 years (70%)
- Disabled (67%)
- 50-59 years (65%)
- Annual household income of less than $80,000 (63%)

Amongst the domestic cycle tourism market who are planning to participate in cycle tourism in the next 12 months….

The experiences or activities most commonly noted as planned were cycle trails (29 percent), or cycling generally (24 percent). Compared to the Australian market, the domestic market is much more likely to name a specific trail or destination, rather than a broad area or activity,

Less than one in ten mentioned they were planning to attend a cycle-related event.

Amongst the Australian cycle tourism market who are planning to participate in cycle tourism in the next 12 months….

Planned cycle tourism activities were a mixture of localised bike rides and interstate cycling.

One in five were planning to mountain bike, or to bike in a national park or forest, and one in ten were planning to do a specific cycle trail.

PLANNED CYCLE TOURISM ACTIVITY/EXPERIENCE CONT.

Are you planning to undertake any cycle tourism activities/experiences within the next year?
If yes, why are you interested in doing this?

	Domestic Market	Australian Market
Fun and enjoyable experience	24%	19%
Explore nature and general scenery	22%	27%
Physical activity/improve fitness	21%	25%
Want to do something new or different	17%	12%
Spending time with friends/family	12%	9%
Mental or physical challenge	8%	10%
To rest and relax	7%	8%
Base: Planning to participate in cycle tourism in next year	n=323	n=302

"It's just like hiking, but on wheels. I like hiking but something different will be fun and exciting and a bit challenging."

"To increase my physical activity, to encourage my spouse's children and friends activity levels"

"It makes me happy and it's like an escape for me"

"Get out and see more of Australia, get to take in more of the regions rather than just driving past. Plus getting some exercise, support our local tourism operator and suppliers."

"Explore new scenes and cycle around the Yarra Ranges and the tracks they have around there for the experience"

"The pandemic made me realise that life is too short. I want to explore more."

INTEREST IN CYCLE TOURISM ACTIVITIES/EXPERIENCES

How interested are you in doing a cycle tourism activity/experience within the next three years?
For what reason(s) do you say that?

	Domestic Market	Australian Market
Very interested	8%	8%
Somewhat interested	50%	43%
Neither interested nor disinterested	24%	30%
Somewhat disinterested	12%	12%
Very disinterested	6%	7%
Base: Not planning to participate in cycle tourism in the next year	n=430	n=450

Interest Reason	Domestic Market	Australian Market
Appealing activity/would like to try	33%	17%
Want to do something different	17%	13%
Fun experience	16%	26%
Want to explore new places	15%	19%
Physical activity/improve fitness	8%	16%
Base: Very/somewhat interested in cycle tourism in the next 3 years	n=250	n=232

Disinterest Reason	Domestic Market	Australian Market
No strong interest in cycling	46%	45%
Limited by health conditions	17%	14%
Seems too difficult/challenging	5%	11%
Concerns about fitness or skill level	5%	11%
Concerns about safety	4%	2%
Difficulties travelling as a family	4%	7%
Time constraints	3%	4%
Base: Very/somewhat disinterested in cycle tourism in the next 3 years	n=76	n=84

CYCLE TOURISM DRIVERS

CURRENT CYCLE TOURISM MARKET

Drivers of cycle tourism are relatively similar for the domestic and Australian current cycle tourism markets. Approximately one in three are motivated by the cycle tourism experience itself, and/or the appeal of the natural environment/scenery. Being active on a trip, the convenience of a cycling activity, and wanting a challenge/adventure are also important drivers. The domestic market is more likely to be influenced by what other people they are travelling with want to do, or what other people are talking about, and the Australian market is more likely to be motivated by a desire to disconnect and/or 'get away from things'.

18-29 year olds and couples without children are more likely to be influenced by recommendations from others, while those aged 60-69 years or with a household income over $160,000 are more likely to participate in a cycle tourism activity because it is convenient to do. Half of 60-69 year olds participated in a cycle tourism activity because the experience appealed to them, a much higher proportion than for the overall market.

Being active on their trip is a driver for two in five of couples with children no longer at home, again a much higher proportion than seen in the overall market.

PROSPECTIVE CYCLE TOURISM MARKET

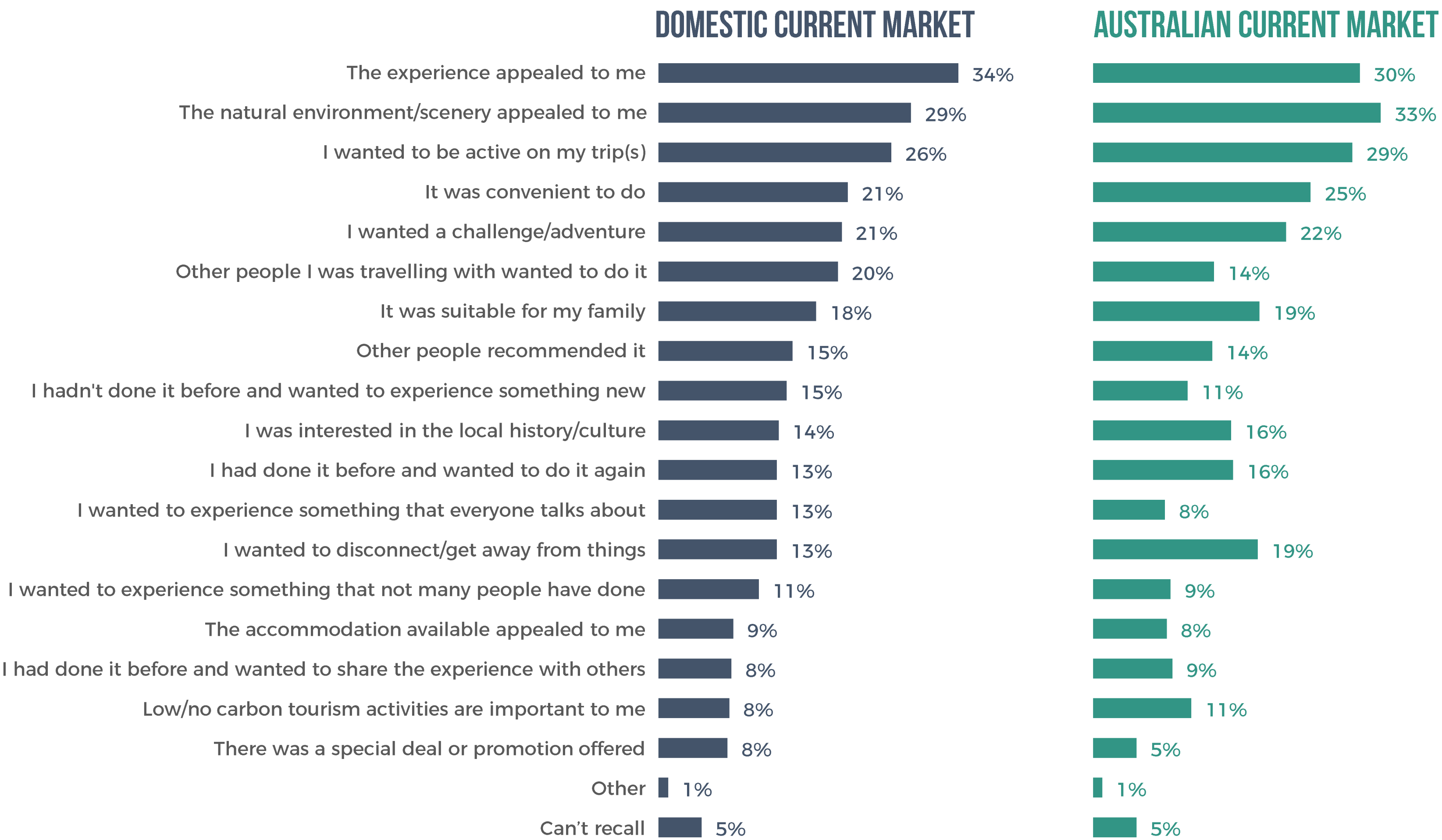
The appeal of the natural environment/scenery, the cycle tourism experience itself, and the desire to experience something new are the biggest drivers for the prospective domestic and Australian cycle tourism markets, but these drivers are all more common in the domestic market than in the Australian market. The desire to do something new, and interest in local history/culture, are more prominent than for the *current* markets. Similarly to the domestic *current* market, the domestic prospective market is also more likely than the Australian prospective market to be interested because of what other people have recommended, or because of what other people are talking about.

Those aged 50-59 years and 70+ years are more likely than the market as a whole to be interested in participating in cycle tourism because the experience appeals to them, while 18-29 year olds are more likely to be influenced by the desire to experience something new they haven't done before. Those with children living at home are more likely to be interested because they believe cycle tourism activities are suitable for their family.

Two in five of those in the domestic market with access to a bike are interested in doing a cycle tourism activity because they want a challenge or adventure, a higher proportion than for the overall domestic prospective market (34%).

CYCLE TOURISM DRIVERS – CURRENT MARKET

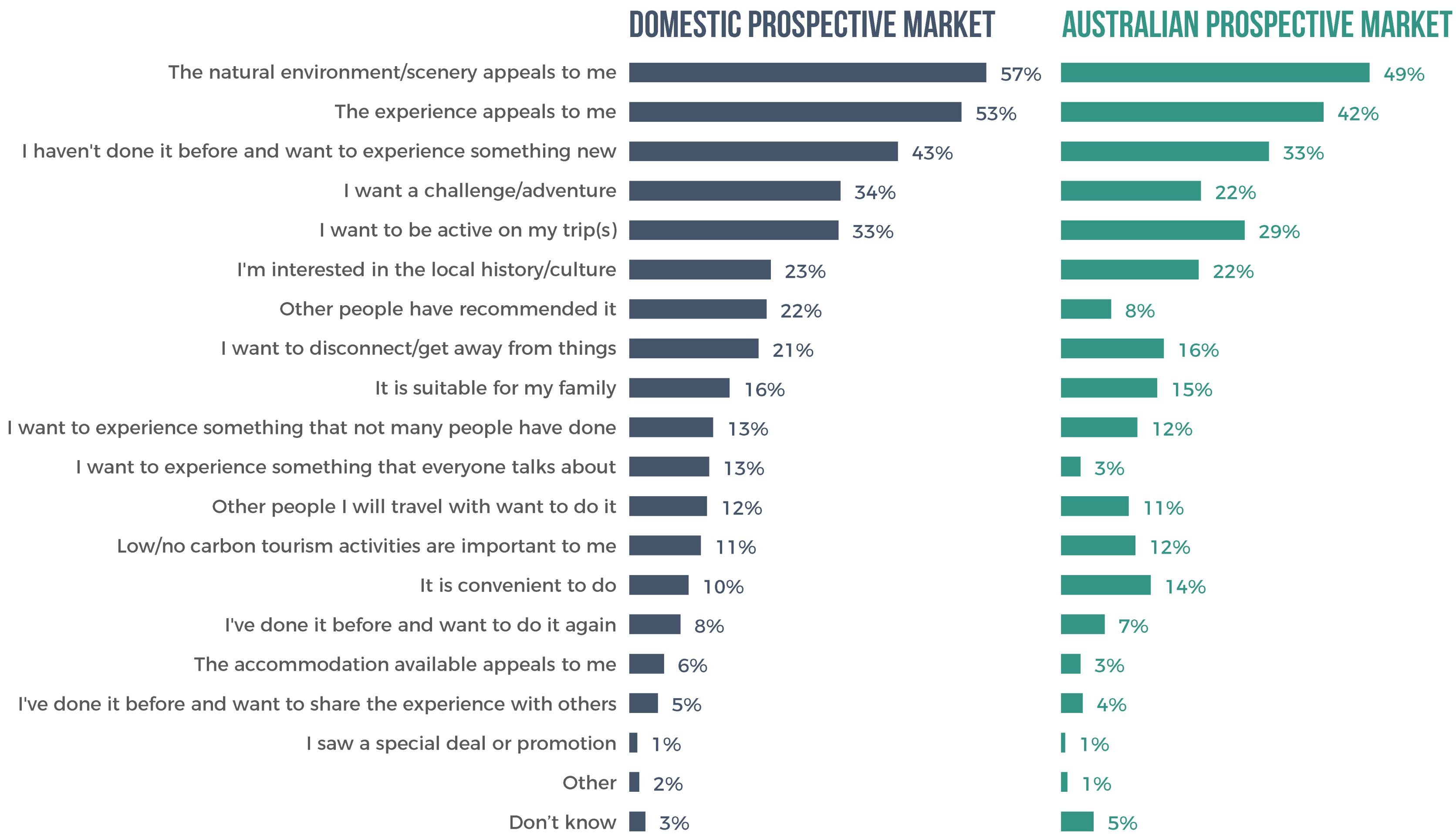
You mentioned earlier that you've participated in some form of cycle tourism in the past year. For what reasons did you choose to do this?



Base: Domestic current cycle tourism market n=447; Australian current cycle tourism market n=466

CYCLE TOURISM DRIVERS – PROSPECTIVE MARKET

You mentioned earlier that you're interested in participating in some form of cycle tourism in the next two years. For what reasons are you interested in doing this type of activity?



Base: Domestic prospective cycle tourism market n=305; Australian prospective cycle tourism market n=286

CYCLE TOURISM BARRIERS

The main barriers for participating in cycle tourism activities are the **weather** being too unpredictable (more of a factor for the domestic market), **not being fit** enough/seeing cycling as too physically demanding, and **not having a suitable bike**. Compared to the Australian cycle tourism market, the domestic market is more likely to perceive cycle tourism activities as too expensive. One in ten don't see any barriers.

Some barriers to participation for the prospective market vary from the current market. The prospective market is more likely to say they don't have a suitable bike, that they're not fit enough/it's too physically demanding, and that they, or those they'd travel with, are not confident cyclists.

Amongst those aged 60 years or more, one in three don't think they're fit enough for cycle tourism activities and one in four don't want to cycle on the road. However, this age group is the least likely to say they don't have enough time to participate.

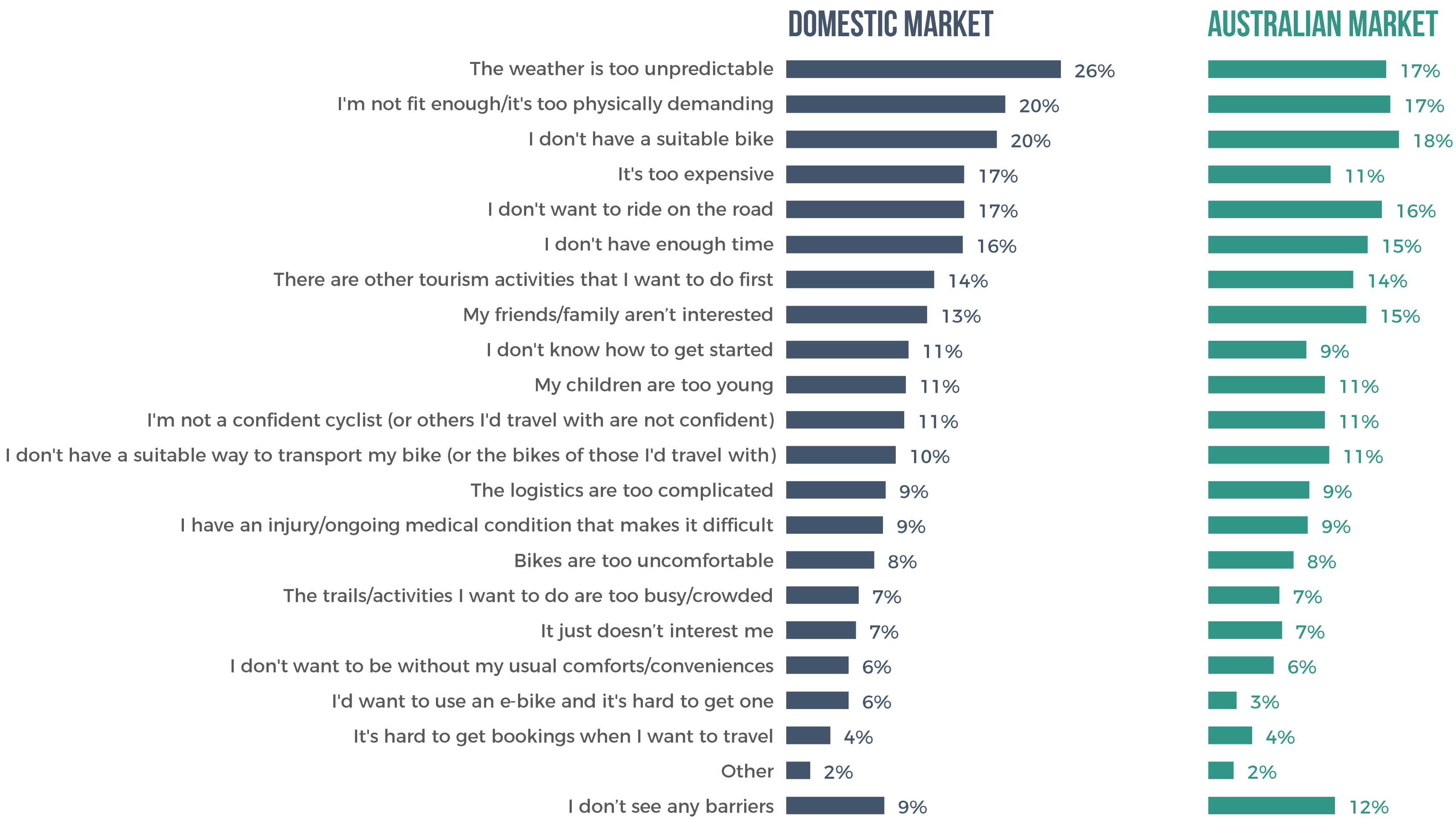
Other notable differences within the sample include:

- A quarter of those with a household income over $160,000 say not having enough time to participate in cycle tourism activities is a barrier
- Females are less likely to be confident cyclists than males
- Those with children that are no longer living at home are more likely to say they don't have a suitable bike, that they're not fit enough, that it's hard to get an e-bike, or that they don't want to ride on the road
- Those aged 30-39 are most likely to think they don't have enough time, and that they have children that are too young
- Māori are less likely to think the logistics are too complicated, and less likely to have other tourism activities they want to do first. While not significantly different to the total domestic sample, a higher proportion of Māori say they don't have a suitable bike, they don't have a suitable way to transport their bike/s, the trails are too busy/crowded, and their children are too young.

At present, difficulty obtaining bookings and crowded trails are not perceived as significant participation barriers, but both factors registered as a more significant barrier to the current than prospective market, likely relating to the recent cycle tourism experience of this group.

CYCLE TOURISM BARRIERS CONT.

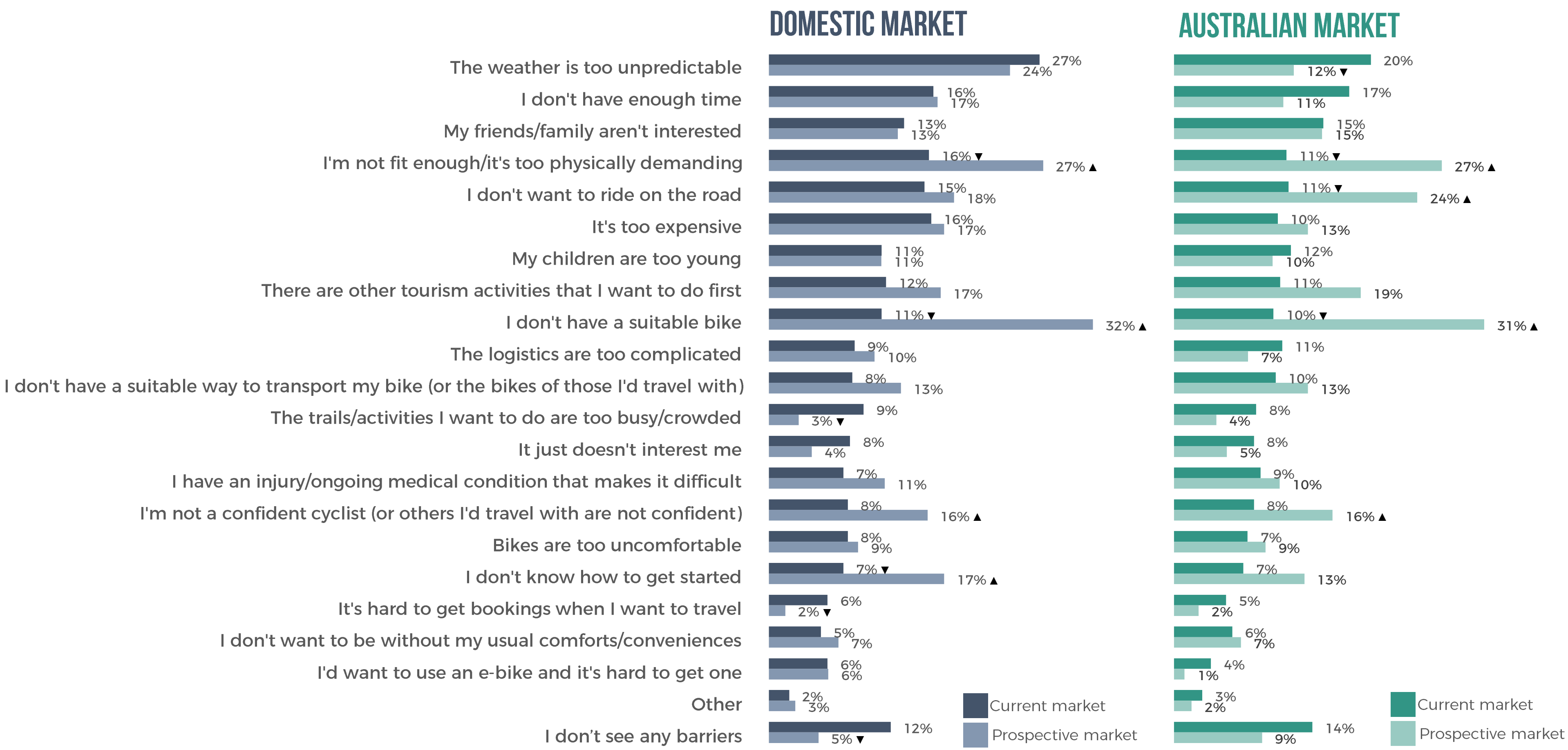
What would you say are the main barriers to you participating in cycle tourism activities (if any)?



Base: Domestic cycle tourism market n=752; Australian cycle tourism market n=752

CYCLE TOURISM BARRIERS – CURRENT & PROSPECTIVE MARKETS

What would you say are the main barriers to you participating in cycle tourism activities (if any)?



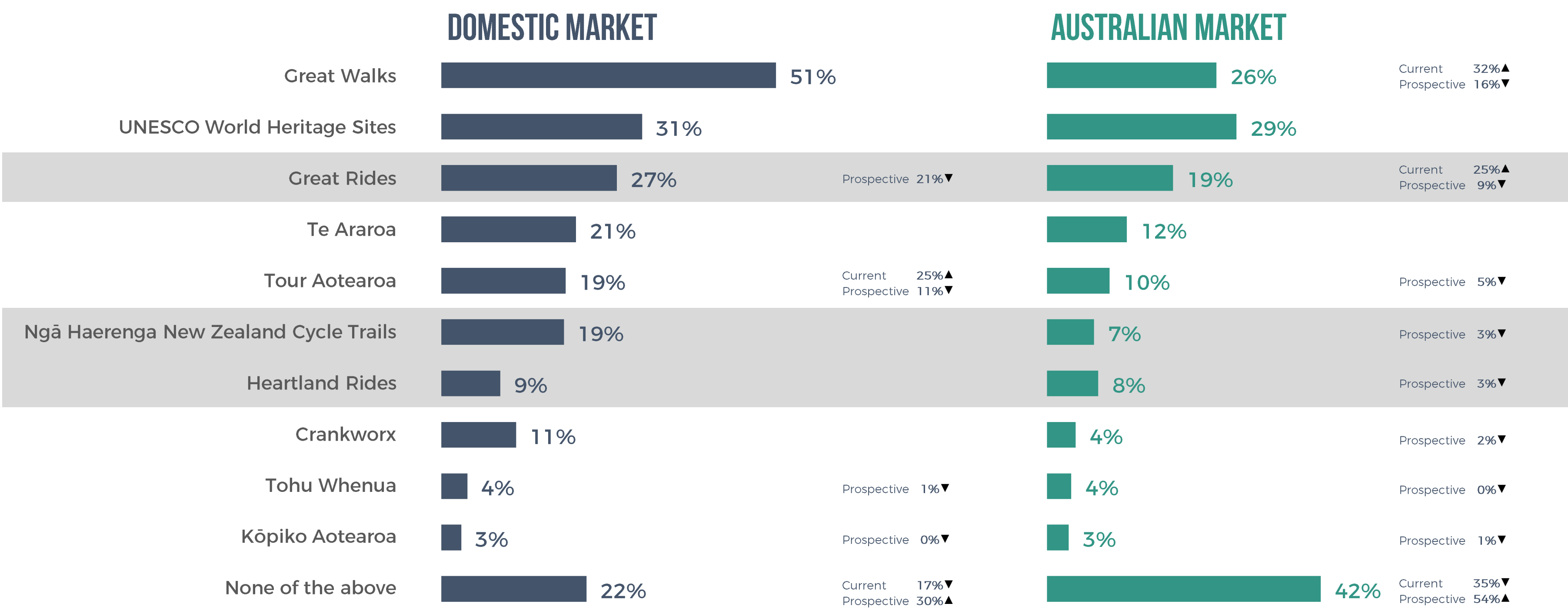
▼/▲ Denotes significant difference relative to the Total domestic/ Australian cycle tourism market, expressed at a 95% confidence level

Base: Domestic current and prospective cycle tourism market (n=447/n=305); Australian current and prospective cycle tourism market (n=466/n=286)

NGĀ HAERENGA NEW ZEALAND CYCLE TRAILS – KNOWLEDGE AND INTEREST

BRAND/PRODUCT AWARENESS

Which of the following have you heard of (if any)?



Awareness of the Ngā Haerenga New Zealand Cycle Trails brand is relatively low. The Great Rides brand has higher awareness but still sits at only about one in four of the domestic cycle tourism market and one in five of the Australian cycle tourism market. Brand recognition is also lower than for Great Walks, but this comparison highlights potential. Those aged 70+ years, and couples with children no longer at home, are more likely to have heard of Great Rides than the market as a whole, while regular and frequent cyclists are more likely to have heard of both Great Rides and Ngā Haerenga New Zealand Cycle Trails than the market as a whole.

▼/▲ Denotes significant difference relative to the Total domestic/Australian cycle tourism market, expressed at a 95% confidence level

Base: Domestic cycle tourism market n=752; Australia cycle tourism market n=752

BRAND/PRODUCT KNOWLEDGE

You mentioned you've heard of Great Rides, Heartland Rides and/or Ngā Haerenga New Zealand Cycle Trails. Briefly, what have you heard or do you know about this/these rides/trails?

40% of the domestic market and 26% of the Australian market answered this question (i.e. had heard of one or more of the three brands).

Many respondents mentioned how they found out about the brand(s) rather than what they knew about them. Almost half (46%) stated they knew very little detail about what the brands were (for example what the included trails are). Commonly however, respondents recalled that the trails were scenic, historic, and varied.

There was little evidence of detailed knowledge, and some incorrect knowledge (for example they are all very challenging trails). Some respondents made mention of the need to provide more information and advertise the trails more.

"I've seen brochures and information around town about them. I know they are well known cycle rides that most keen cyclers do."

"That they are heritage rides and you can see some of New Zealand's history on these rides."

"I only heard of these names and know where the some of them start and end but apart from that not much more"

"They are highly rated trail rides in significant locations in NZ"

"That they're interconnected road cycle ways that pass through small towns and villages in scenic countryside"

"I have heard about the Ngā Haerenga New Zealand Cycle Trails from friends who have been to New Zealand for a holiday and undertook some of them. They said the scenery was beautiful and ride was relatively easy for beginners."

"You're able to ride the entirety of New Zealand on these trails, they have accommodation etc.. en route"

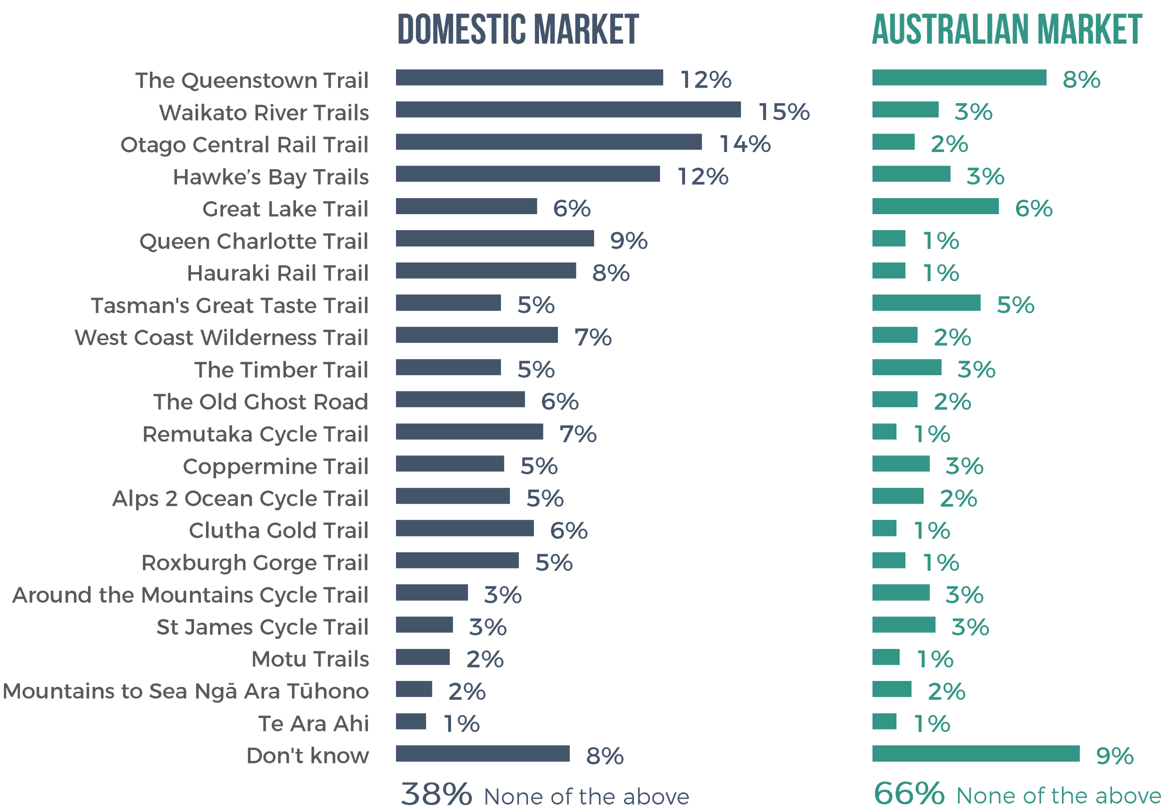
"How they follow old rail lines in picturesque places."

PRODUCT DIRECT EXPERIENCE

2.3
Trails Experienced
(on average – based on the 62% who've been on one or more)

1.8
Trails Experienced
(on average – based on the 34% who've been on one or more)

On which of the following trails (if any) have you ever cycled/walked?
What other trails have you cycled on in the last 12 months, if any?



Current Market – most common trails:
- Waikato River Trails (19%)
- Otago Central Rail Trail (17%)
- The Queenstown Trail (16%)

Prospective Market – most common trails:
- Waikato River Trail (10%)
- Queen Charlotte Trail (9%)
- Otago Central Rail Trail (9%)

Current Market – most common trails:
- The Queenstown Trail (10%)
- Great Lake Trail (9%)
- Tasman's Great Taste Trail (7%)

Prospective Market – most common trails:
- The Queenstown Trail (3%)
- Waikato River Trails (2%)
- Queen Charlotte Trail (1%)

Approximately 200 other locations were mentioned in terms of where respondents had cycled recently, but these were not necessarily 'trails'. Examples include Tasmania, Uluru, Watagans State Forest, Royal National Park, Gold Coast waterways, Werribee River Trail, Munda Biddi Trail, Great Ocean Road, Rotorua Redwoods, Mt Hutt, Taupō, Waipu, Hunua Ranges, Hutt River Trail, Remutaka Rail Trail, wineries around Blenheim, and Christchurch Adventure Park trails.

Base: Domestic cycle tourism market n=752; Australia cycle tourism market n=752

NGĀ HAERENGA NEW ZEALAND CYCLE TRAILS

Survey respondents read the information below about Ngā Haerenga New Zealand Cycle Trails (sourced from the Ngā Haerenga New Zealand Cycle Trails website).

The insights that following relate specifically to Ngā Haerenga New Zealand Cycle Trails, rather than cycle tourism more generally.

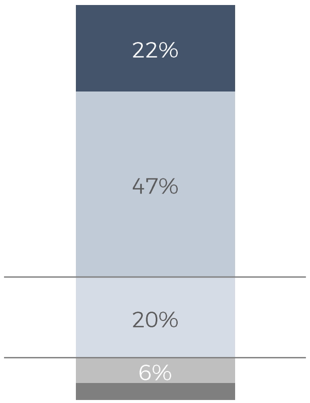
The New Zealand Cycle Trail – also known as Ngā Haerenga ('The Journeys') – is made up of 22 Great Rides. Created in 2009 and mainly off-road, the trails not only showcase some of New Zealand's most amazing landscapes but are also an invigorating and environmentally sustainable way to reach major sights and activities. Heartland Rides provide the safest road or rideable alternative linking Great Rides and other major cycle touring routes.

Although most of the Great Rides offer multi-day riding experiences, many can also be enjoyed as short rides, from an hour to all day. A couple are loop rides, but most provide a one-way journey (often best ridden in a certain direction to take advantage of the topography) with others offering side trails or detours to suit particular interests and itineraries. The 21km Roxburgh Gorge Trail is the shortest of the Great Rides, while the Alps 2 Ocean is the longest at 306km.

Ngā Haerenga New Zealand Cycle Trails has rides to suit everyone. They range from flat, smooth pathways suitable for beginners or rusty riders, to hilly, rough terrain best suited to experienced mountain bikers. Each trail (and each section of trail) is graded according to New Zealand's official Trail Grades. The majority are grade 2 (easy) to grade 3 (intermediate).

NGĀ HAERENGA NEW ZEALAND CYCLE TRAILS - INTEREST

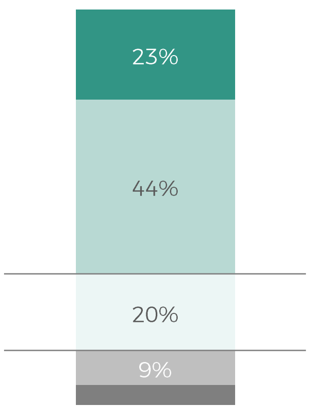
How interested are you in doing some form of cycle tourism activity on Ngā Haerenga New Zealand Cycle Trails within the next three years?



	Domestic Cycle Tourism Market		
	Total	Current	Prospective
Very interested	22%	24%	19%
Somewhat interested	47%	47%	48%
Neither interested nor disinterested	20%	18%	25%
Somewhat disinterested	6%	6%	7%
Very disinterested	4%	6%	2%▼
	n=752	n=447	n=305

Who's significantly more likely to be 'Very Interested'?

- Frequent cyclist (52%)
- Mixed distance cyclist (50%)
- Longer distance cyclist (38%)
- Road & off-road cyclist (37%)
- 40-49 years (30%)
- Been on a NHNZCT before (30%)
- Bike access/owner (27%)



	Australian Cycle Tourism Market		
	Total	Current	Prospective
Very interested	23%	31%▲	10%▼
Somewhat interested	44%	43%	46%
Neither interested nor disinterested	20%	15%▼	28%▲
Somewhat disinterested	9%	7%	11%
Very disinterested	5%	5%	5%
	n=752	n=466	n=286

Who's significantly more likely to be 'Very Interested'?

- Longer distance cyclist (50%)
- Frequent cyclist (44%)
- Road & off-road cyclist (37%)
- Mainly off-road cyclist (36%)
- Been on a NHNZCT before (30%)
- Mixed distance cyclist (35%)
- Regular cyclist (33%)
- Household income $160k+ (32%)
- 30-39 years (31%)

▼/▲ Denotes significant difference relative to the Total Australian cycle tourism market, expressed at a 95% confidence level

NGĀ HAERENGA NEW ZEALAND CYCLE TRAILS – INTEREST REASON

For what reasons(s) do you say that? [Re interest level in doing some form of cycle tourism activity on Ngā Haerenga New Zealand Cycle Trails within the next three years]

For the two thirds of interested domestic respondents, fun (25%), enjoying the scenery and outdoors (18%), and having a new experience (17%) were the most common drivers of interest. The variety of trails was also of interest – especially appealing to those who want to experience a flat/easier trail (with family or as an introduction to cycle trails).

Some interested or neutral respondents felt they were limited by health/fitness concerns and family/time limitations.

"As the family gets older cycle rides are becoming more appealing, especially ones that have components of local history or culture."

"Attractive concept: staying fit while enjoying the scenery better than is possible while driving."

"Don't have a way to get a bike to any of the trails, then have to hire one which is too expensive. They also seem to be long and hilly, and I'm not a sports cyclist, just a person who rides a bicycle."

The main drivers of interest for the Australian market are the opportunity to enjoy nature and the outdoors, or the scenery of New Zealand (20%), for simple enjoyment (15%), or to experience something new (14%). The variety of trails appealed to 12%, with most interested in the flatter, beginner options.

Many with neutral interest or not interested were not intending to travel to New Zealand or did not have a strong interested in cycling. Others cited health/fitness limitations, time constraints and financial constraints.

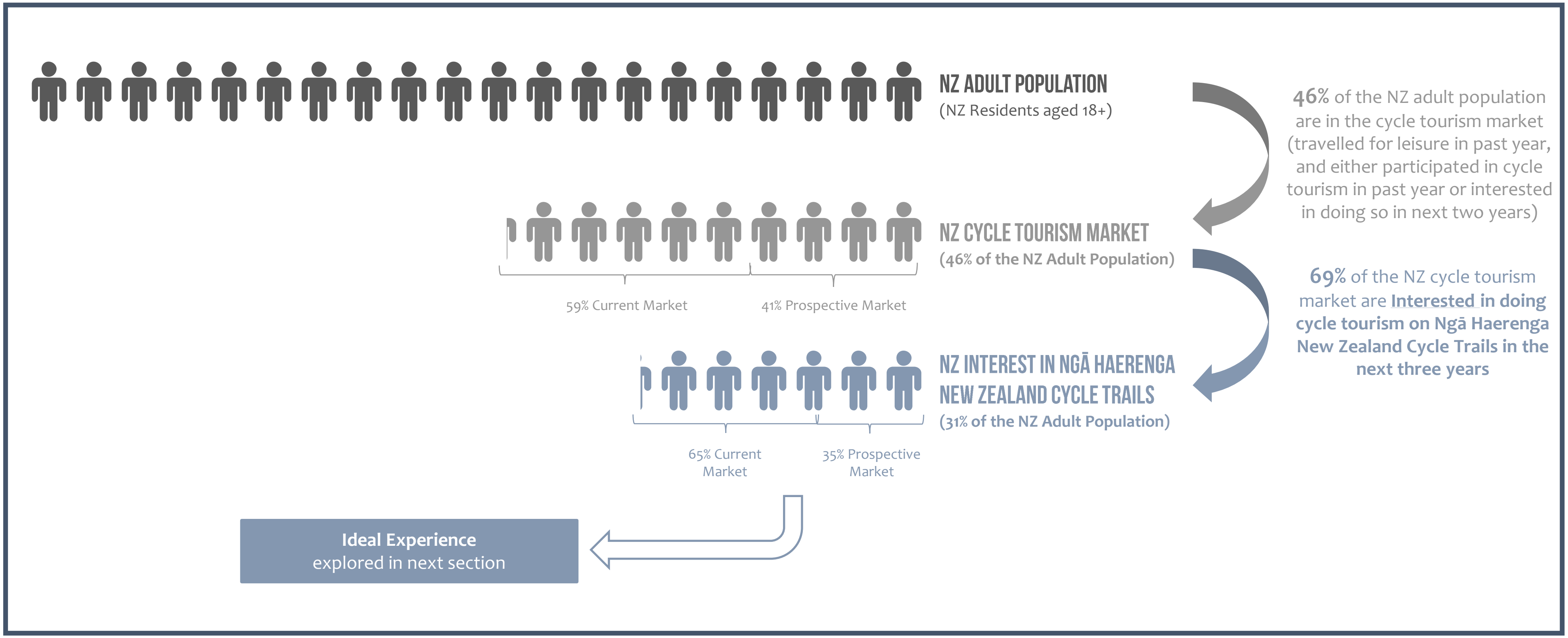
"Sounds perfect, my family can enjoy the day and hopefully wait for me, which wouldn't take too long. Some of my best ever holidays have been similar to this."

"If I happened to be there, perhaps I would just to be curious, but I definitely would not go out of my way to specifically do it."

"They all sound like you need to be super bike fit which I am not."

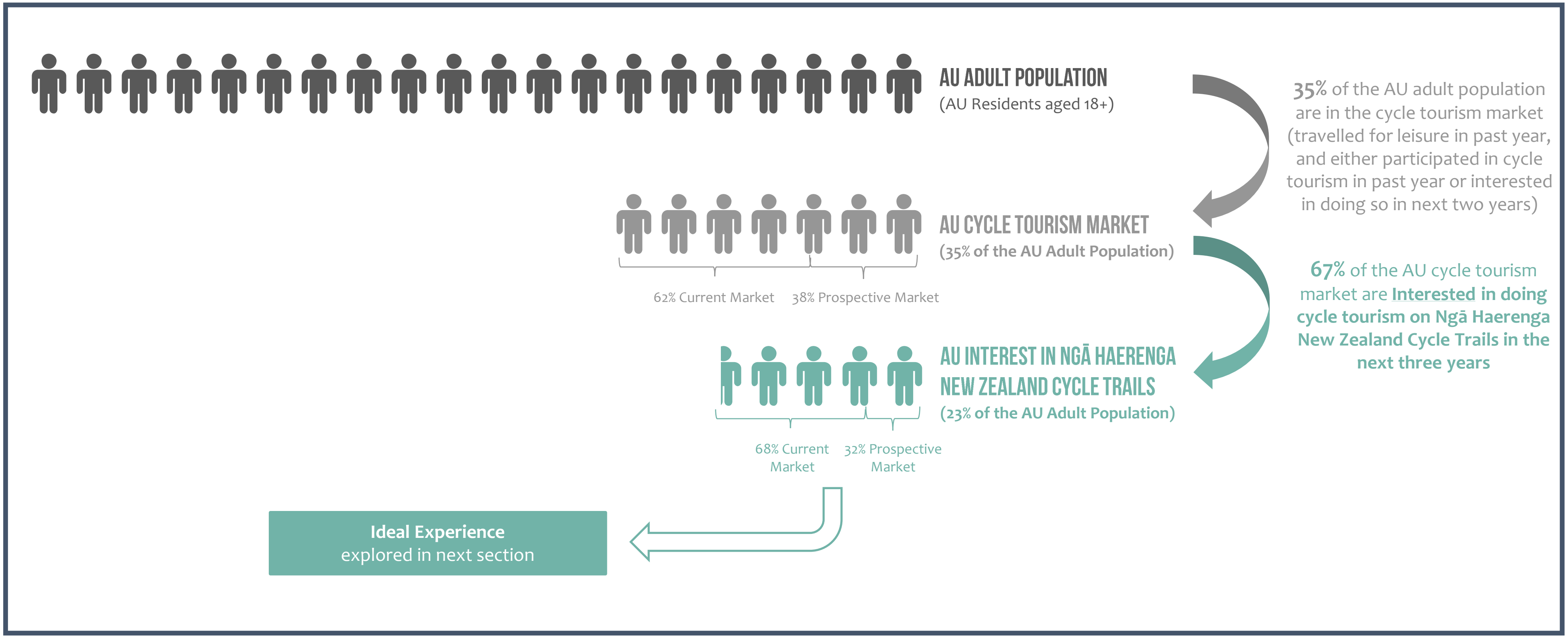
INTEREST FRAMEWORK – DOMESTIC MARKET

The following diagram illustrates the extent of interest in cycle tourism, and Ngā Haerenga New Zealand Cycle Trails, in the context of the total **New Zealand** adult population. This indicates that just under half are in the cycle tourism market, but only three in ten have an interest in doing one or more cycle tourism activities/experiences on Ngā Haerenga New Zealand Cycle Trails in the next three years.



INTEREST FRAMEWORK – AUSTRALIAN MARKET

The following diagram illustrates the extent of interest in cycle tourism, and Ngā Haerenga New Zealand Cycle Trails, in the context of the total Australian adult population. This indicates that just over one third are in the cycle tourism market, but only one in five have an interest in doing one or more cycle tourism activities/experiences on Ngā Haerenga New Zealand Cycle Trails in the next three years.



NGĀ HAERENGA NEW ZEALAND CYCLE TRAILS — IDEAL EXPERIENCE

NGĀ HAERENGA NEW ZEALAND CYCLE TRAILS - IDEAL EXPERIENCE SUMMARY

For those very or somewhat interested in doing a cycle tourism activity on Ngā Haerenga New Zealand Cycle Trails in the next three years, the ideal experience would most commonly last only half a day. Just one quarter would ideally undertake a two day or longer experience. This underscores the importance of promoting trail *sections* as well as 'complete' trails.

For those who would ideally do a multi-day ride, the most commonly preferred cycle time per day is 4-6 hours. Preferred accommodation in the domestic market is bed & breakfast, Airbnb and motel, and in the Australian market hotel, holiday park, and bed & breakfast.

For seven in ten, the ideal trail grade is grade 1 or 2 (easier trails). The domestic and Australian current markets are more likely to opt for intermediate trails (grade 3), while the prospective markets prefer the easiest trails (grade 1).

A third would like to complete the trail or trail section with their spouse or partner only, an almost one in five want to cycle alone.

Perhaps not surprisingly, the domestic market are more likely to use their own bikes compared to Australians, and the domestic prospective market is more likely to rent an e-bike than is the domestic current market.

Having partial support during the experience (assistance with things like bike hire, shuttles, luggage transfers, and accommodation bookings) is the most preferred way to experience the cycle trails. Having said this, two in five in the domestic market want to cycle on the trails completely independently, and one third of the Australian market want full support (where all logistics are taken care of, including an accompanying guide).

NGĀ HAERENGA NEW ZEALAND CYCLE TRAILS IDEAL EXPERIENCE - DOMESTIC MARKET

Of the 69% who are very/somewhat interested in doing a cycle tourism activity on Ngā Haerenga New Zealand Cycle Trails in the next 3 years...

LENGTH OF EXPERIENCE YOU'D IDEALLY UNDERTAKE

Less than 1 hour	7%
1-4 hours	48%
1 day (4+ hours)	19%
2 days	10%
3 days	9%
4 days	3%
5 days	2%
6+ days	1%
Don't know	2%

Of the 25% who want to travel for more than a day

PREFERRED DAILY HOURS CYCLING

5%	0-2 hours
29%	2-4 hours
57%	4-6 hours
7%	6+ hours
2%	Don't know

PREFERRED ACCOMMODATION

26%	Bed & breakfast
25%	Airbnb/rented holiday house
24%	Motel
20%	Camping (not in a holiday park)
20%	Basic hut/cabin (not in a holiday park)
20%	Holiday park
17%	Lodge
16%	Hotel
13%	Farmstay
9%	Glamping
9%	Backpacker/hostel
4%	Luxury accommodation
0%	Other
2%	Don't know

IDEAL TRAVEL PARTY

32%	Spouse/partner only
17%	Family by ourselves
16%	Alone (just myself)
15%	Group of friends
8%	Couple, with other couples
5%	Other family group by ourselves
3%	Family, with other families
1%	Part of club or organised group
0%	Other
2%	Don't know

IDEAL BIKE USE

48%	My own bike
20%	Rented bike
16%	Rented e-bike
9%	My own e-bike
0%	Other
6%	Don't know

IDEAL GRADE

25%	**Easiest** (grade 1)
46%	**Easy** (grade 2)
23%	**Intermediate** (grade 3)
4%	**Advanced** (grade 4)
0%	**Expert** (grade 5)
1%	A mix of grades

IDEAL SUPPORT LEVEL

19%	**Full support**
41%	**Partial support**
37%	**Independent trip**
3%	**Don't know**

NGĀ HAERENGA NEW ZEALAND CYCLE TRAILS IDEAL EXPERIENCE - AUSTRALIAN MARKET

Of the 67% who are very/somewhat interested in doing a cycle tourism activity on Ngā Haerenga New Zealand Cycle Trails in the next 3 years...

LENGTH OF EXPERIENCE YOU'D IDEALLY UNDERTAKE

Less than 1 hour	7%
1-4 hours	45%
1 day (4+ hours)	16%
2 days	9%
3 days	7%
4 days	4%
5 days	4%
6+ days	4%
Don't know	4%

Of the 27% who want to travel for more than a day

PREFERRED DAILY HOURS CYCLING

7%	0-2 hours
40%	2-4 hours
48%	4-6 hours
4%	6+ hours
1%	Don't know

PREFERRED ACCOMMODATION

24%	Hotel
22%	Holiday park
20%	Bed & breakfast
20%	Airbnb/rented holiday house
20%	Motel
19%	Camping (not in a holiday park)
15%	Basic hut/cabin (not in a holiday park)
15%	Luxury accommodation
13%	Lodge
13%	Glamping
11%	Farmstay
5%	Backpacker/hostel
0%	Other
2%	Don't know

IDEAL TRAVEL PARTY

35%	Spouse/partner only
18%	Alone (just myself)
16%	Family by ourselves
15%	Group of friends
8%	Couple, with other couples
4%	Other family group by ourselves
4%	Family, with other families
1%	Part of club or organised group
0%	Other
1%	Don't know

IDEAL BIKE USE

45%	Rented bike
24%	My own bike
14%	Rented e-bike
12%	My own e-bike
1%	Other
5%	Don't know

IDEAL GRADE

29%	**Easiest** (grade 1)
40%	**Easy** (grade 2)
24%	**Intermediate** (grade 3)
6%	**Advanced** (grade 4)
1%	**Expert** (grade 5)
1%	A mix of grades

IDEAL SUPPORT LEVEL

33%	**Full support**
45%	**Partial support**
18%	**Independent trip**
4%	**Don't know**

Base: Australian cycle tourism market very/somewhat interested in doing cycle tourism activity on NHNZCT in next 3 years (n=502)

IDEAL EXPERIENCE BY KEY SEGMENTS

The following pages look at the ideal Ngā Haerenga New Zealand Cycle Trails experience by key segments within the group of respondents very or somewhat interested in doing a trail-based cycle tourism activity in the next three years.

The segments were selected to highlight some specific groups within the overall market that have potential for growth, and that are in line with some of the segmentation approaches identified in the design phase. Some are segments already noted as prominent in the market but that have further potential, and others are groups with notable interest but that are not currently prominent. They also draw on the dimensions of the sample where most differences are generally present in survey response (age/life stage, income, and cycling frequency).

Six segments were analysed – those aged 18-29 years, 30-59 years, and 60+ years, those with household incomes over $160,000, and regular/frequent cyclists and irregular/infrequent cyclists.

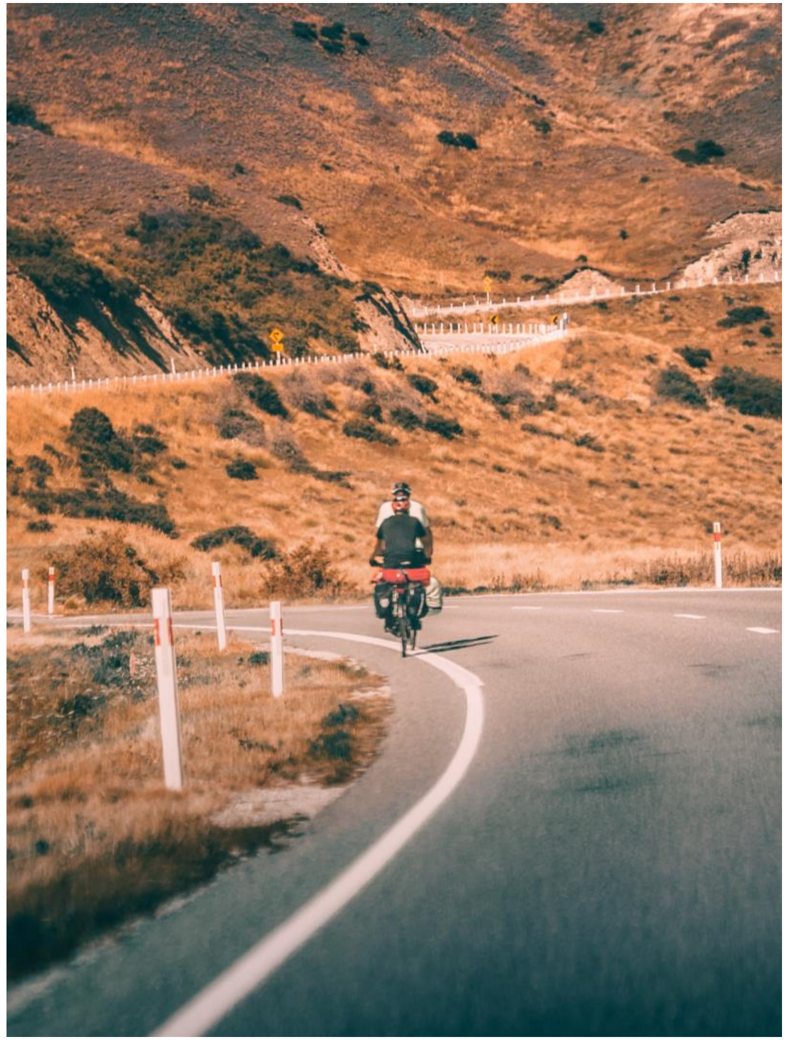
Key aspects of each segment's ideal experience include:

18-29 YEARS

For half of this segment, the ideal length of cycle trail experience is just 1-4 hours - only one in five want to cycle for more than a day. This segment is more likely to travel with a group of friends (one in four), and tends towards a more challenging trail with two in five wanting to cycle an intermediate (grade 3) or higher grade trail.

30-59 YEARS

The ideal experience for those aged 30-59 years is very similar to the overall market, however this segment is more likely to travel as a family (by themselves) – for one in four this is the preferred travel group.



IDEAL EXPERIENCE BY KEY SEGMENTS CONT.

60+ YEARS

Across the segments, those aged 60+ have the lowest level of interest in doing a cycle tourism activity on Ngā Haerenga New Zealand Cycle Trails in the next 3 years (although three in five are interested). For those interested in multi-day rides, one in two prefer bed and breakfasts as their accommodation. Although nine in ten would prefer to ride an easy (grade 1 or 2) trail, this segment are less likely to seek a fully supported cycle (e.g. fully guided). Half want to travel with their spouse/partner only and two thirds would use their own bike (or e-bike).

HOUSEHOLD INCOME OVER $160,000

This segment has the highest level of interest in doing a cycle tourism activity on Ngā Haerenga New Zealand Cycle Trails in the next 3 years (three in four are interested). One third of this segment want to travel for more than a day, with most wanting to cycle for 4-6 hours per day. This segment is least likely to want to travel with a group of friends.

REGULAR/FREQUENT CYCLIST

Across the segments, regular/frequent cyclists are the most likely to want to cycle for more than a day (almost two in five want to do this). They are also most likely to seek out challenging rides with close to half likely to opt for an intermediate or advanced (grade 3 or 4) trail. Perhaps unsurprisingly, regular/frequent cyclists are more likely to use their own bike (or e-bike) on the trails. One fifth would prefer to travel alone.

<u>NOT</u> REGULAR/FREQUENT CYCLIST

Amongst those who do not cycle frequently, three fifths would prefer an experience that lasts less than four hours – only one fifth want to cycle for two or more days. Unlike the more experienced cyclists, this segment are more likely to opt for the easiest (grade 1) trails, and to rent a bike (or e-bike).

NGĀ HAERENGA NEW ZEALAND CYCLE TRAILS IDEAL EXPERIENCE - 18 - 29 YEARS

Of the 67% who are very/somewhat interested in doing a cycle tourism activity on Ngā Haerenga New Zealand Cycle Trails in the next 3 years...

LENGTH OF EXPERIENCE YOU'D IDEALLY UNDERTAKE

Less than 1 hour	6%
1-4 hours	50%
1 day (4+ hours)	20%
2 days	9%
3 days	7%
4 days	3%
5 days	2%
6+ days	1%
Don't know	2%

Of the 21% who want to travel for more than a day

PREFERRED DAILY HOURS CYCLING

6%	0-2 hours
30%	2-4 hours
60%	4-6 hours
4%	6+ hours
0%	Don't know

PREFERRED ACCOMMODATION

30%	Bed & breakfast
28%	Airbnb/rented holiday house
20%	Camping (not in a holiday park)
20%	Basic hut/cabin (not in a holiday park)
20%	Hotel
18%	Motel
18%	Lodge
16%	Glamping
16%	Holiday park
10%	Backpacker/hostel
8%	Farmstay
8%	Luxury accommodation
0%	Other
2%	Don't know

IDEAL TRAVEL PARTY

27%	Spouse/partner only
23%	Group of friends
19%	Alone (just myself)
10%	Family by ourselves
9%	Couple, with other couples
6%	Other family group by ourselves
4%	Family, with other families
2%	Part of club or organised group
0%	Other
1%	Don't know

IDEAL BIKE USE

42%	My own bike
30%	Rented bike
14%	Rented e-bike
9%	My own e-bike
0%	Other
5%	Don't know

IDEAL GRADE

21%	**Easiest** (grade 1)
40%	**Easy** (grade 2)
29%	**Intermediate** (grade 3)
8%	**Advanced** (grade 4)
1%	**Expert** (grade 5)
1%	A mix of grades

IDEAL SUPPORT LEVEL

27%	**Full support**
47%	**Partial support**
24%	**Independent trip**
3%	**Don't know**

NGĀ HAERENGA NEW ZEALAND CYCLE TRAILS IDEAL EXPERIENCE - 30 - 59 YEARS

Of the 71% who are very/somewhat interested in doing a cycle tourism activity on Ngā Haerenga New Zealand Cycle Trails in the next 3 years...

LENGTH OF EXPERIENCE YOU'D IDEALLY UNDERTAKE

Less than 1 hour	7%
1-4 hours	45%
1 day (4+ hours)	16%
2 days	10%
3 days	8%
4 days	3%
5 days	3%
6+ days	3%
Don't know	3%

Of the 28% who want to travel for more than a day

PREFERRED DAILY HOURS CYCLING

6%	0-2 hours
36%	2-4 hours
50%	4-6 hours
7%	6+ hours
1%	Don't know

PREFERRED ACCOMMODATION

25%	Holiday park
22%	Motel
21%	Hotel
21%	Camping (not in a holiday park)
20%	Airbnb/rented holiday house
17%	Basic hut/cabin (not in a holiday park)
17%	Bed & breakfast
13%	Lodge
12%	Farmstay
11%	Glamping
10%	Luxury accommodation
6%	Backpacker/hostel
0%	Other
1%	Don't know

IDEAL TRAVEL PARTY

30%	Spouse/partner only
23%	Family by ourselves
15%	Alone (just myself)
13%	Group of friends
8%	Couple, with other couples
5%	Other family group by ourselves
4%	Family, with other families
0%	Part of club or organised group
0%	Other
1%	Don't know

IDEAL BIKE USE

45%	My own bike
24%	Rented bike
14%	Rented e-bike
12%	My own e-bike
0%	Other
5%	Don't know

IDEAL GRADE

28%	**Easiest** (grade 1)
41%	**Easy** (grade 2)
24%	**Intermediate** (grade 3)
5%	**Advanced** (grade 4)
0%	**Expert** (grade 5)
1%	A mix of grades

IDEAL SUPPORT LEVEL

27%	**Full support**
41%	**Partial support**
27%	**Independent trip**
4%	**Don't know**

NGĀ HAERENGA NEW ZEALAND CYCLE TRAILS IDEAL EXPERIENCE - 60+ YEARS

Of the 58% who are very/somewhat interested in doing a cycle tourism activity on Ngā Haerenga New Zealand Cycle Trails in the next 3 years…

LENGTH OF EXPERIENCE YOU'D IDEALLY UNDERTAKE

Less than 1 hour	6%
1-4 hours	47%
1 day (4+ hours)	20%
2 days	7%
3 days	10%
4 days	2%
5 days	2%
6+ days	1%
Don't know	5%

Of the 22% who want to travel for more than a day

PREFERRED DAILY HOURS CYCLING

6%	0-2 hours
38%	2-4 hours
53%	4-6 hours
0%	6+ hours
3%	Don't know

PREFERRED ACCOMMODATION

47%	Bed and breakfast
31%	Motel
28%	Airbnb/rented holiday house
22%	Farmstay
22%	Lodge
16%	Basic hut/cabin (not in a holiday park)
13%	Camping (not in a holiday park)
13%	Hotel
9%	Holiday park
9%	Backpacker/hostel
9%	Luxury accommodation
3%	Glamping
0%	Other
6%	Don't know

IDEAL TRAVEL PARTY

49%	Spouse/partner only
18%	Alone (just myself)
12%	Group of friends
8%	Couple, with other couples
4%	Other family group by ourselves
3%	Part of club or organised group
2%	Family by ourselves
0%	Family, with other families
0%	Other
4%	Don't know

IDEAL BIKE USE

34%	Rented e-bike
25%	My own bike
21%	My own e-bike
14%	Rented bike
2%	Other
4%	Don't know

IDEAL GRADE

34%	**Easiest** (grade 1)
55%	**Easy** (grade 2)
9%	**Intermediate** (grade 3)
0%	**Advanced** (grade 4)
0%	**Expert** (grade 5)
2%	A mix of grades

IDEAL SUPPORT LEVEL

18%	**Full support**
43%	**Partial support**
35%	**Independent trip**
4%	**Don't know**

Base: Cycle tourism market aged 60+ & very/somewhat interested in doing cycle tourism activity on NHNZCT in next 3 years (n=146)

NGĀ HAERENGA NEW ZEALAND CYCLE TRAILS IDEAL EXPERIENCE – H/HOLD INCOME OVER 160K

Of the 76% who are very/somewhat interested in doing a cycle tourism activity on Ngā Haerenga New Zealand Cycle Trails in the next 3 years...

LENGTH OF EXPERIENCE YOU'D IDEALLY UNDERTAKE

Less than 1 hour	5%
1-4 hours	41%
1 day (4+ hours)	20%
2 days	10%
3 days	8%
4 days	5%
5 days	3%
6+ days	5%
Don't know	2%

Of the 32% who want to travel for more than a day

PREFERRED DAILY HOURS CYCLING

0-2 hours	6%
2-4 hours	19%
4-6 hours	64%
6+ hours	9%
Don't know	2%

PREFERRED ACCOMMODATION

26%	Camping (not in a holiday park)
23%	Motel
21%	Hotel
19%	Airbnb/rented holiday house
19%	Basic hut/cabin (not in a holiday park)
19%	Lodge
17%	Bed and breakfast
17%	Luxury accommodation
15%	Glamping
13%	Holiday park
13%	Farmstay
9%	Backpacker/hostel
0%	Other
0%	Don't know

IDEAL TRAVEL PARTY

40%	Spouse/partner only
18%	Alone (just myself)
17%	Family by ourselves
11%	Couple, with other couples
7%	Group of friends
3%	Other family group by ourselves
3%	Family, with other families
0%	Part of club or organised group
0%	Other
0%	Don't know

IDEAL BIKE USE

37%	My own bike
34%	Rented bike
18%	Rented e-bike
9%	My own e-bike
0%	Other
2%	Don't know

IDEAL GRADE

21%	**Easiest** (grade 1)
36%	**Easy** (grade 2)
30%	**Intermediate** (grade 3)
10%	**Advanced** (grade 4)
1%	**Expert** (grade 5)
2%	A mix of grades

IDEAL SUPPORT LEVEL

24%	**Full support**
38%	**Partial support**
36%	**Independent trip**
1%	**Don't know**

NGĀ HAERENGA NEW ZEALAND CYCLE TRAILS IDEAL EXPERIENCE - REG./FREQUENT CYCLISTS

Of the 75% who are very/somewhat interested in doing a cycle tourism activity on Ngā Haerenga New Zealand Cycle Trails in the next 3 years...

LENGTH OF EXPERIENCE YOU'D IDEALLY UNDERTAKE

Less than 1 hour	4%
1-4 hours	37%
1 day (4+ hours)	20%
2 days	13%
3 days	10%
4 days	4%
5 days	4%
6+ days	4%
Don't know	4%

Of the 36% who want to travel for more than a day

PREFERRED DAILY HOURS CYCLING

4%	0-2 hours
26%	2-4 hours
59%	4-6 hours
9%	6+ hours
1%	Don't know

PREFERRED ACCOMMODATION

25%	Airbnb/rented holiday house
25%	Motel
24%	Camping (not in a holiday park)
21%	Bed and breakfast
19%	Holiday park
19%	Hotel
18%	Basic hut/cabin (not in a holiday park)
16%	Lodge
10%	Glamping
8%	Farmstay
7%	Luxury accommodation
7%	Backpacker/hostel
0%	Other
1%	Don't know

IDEAL TRAVEL PARTY

27%	Spouse/partner only
21%	Alone (just myself)
17%	Group of friends
16%	Family by ourselves
9%	Couple, with other couples
4%	Other family group by ourselves
3%	Family, with other families
2%	Part of club or organised group
0%	Other
1%	Don't know

IDEAL BIKE USE

50%	My own bike
24%	Rented bike
14%	My own e-bike
9%	Rented e-bike
1%	Other
3%	Don't know

IDEAL GRADE

11%	**Easiest** (grade 1)
40%	**Easy** (grade 2)
36%	**Intermediate** (grade 3)
10%	**Advanced** (grade 4)
1%	**Expert** (grade 5)
2%	A mix of grades

IDEAL SUPPORT LEVEL

26%	**Full support**
41%	**Partial support**
29%	**Independent trip**
3%	**Don't know**

NGĀ HAERENGA NEW ZEALAND CYCLE TRAILS IDEAL EXPERIENCE - NOT REG./FREQUENT CYCLISTS

Of the 64% who are very/somewhat interested in doing a cycle tourism activity on Ngā Haerenga New Zealand Cycle Trails in the next 3 years…

LENGTH OF EXPERIENCE YOU'D IDEALLY UNDERTAKE

Less than 1 hour	9%
1-4 hours	53%
1 day (4+ hours)	16%
2 days	7%
3 days	7%
4 days	2%
5 days	2%
6+ days	1%
Don't know	2%

Of the 20% who want to travel for more than a day

PREFERRED DAILY HOURS CYCLING

7%	0-2 hours
44%	2-4 hours
46%	4-6 hours
2%	6+ hours
1%	Don't know

PREFERRED ACCOMMODATION

25%	Bed and breakfast
24%	Holiday park
20%	Hotel
20%	Airbnb/rented holiday house
20%	Motel
17%	Basic hut/cabin (not in a holiday park)
17%	Farmstay
15%	Camping (not in a holiday park)
15%	Lodge
13%	Glamping
13%	Luxury accommodation
8%	Backpacker/hostel
0%	Other
2%	Don't know

IDEAL TRAVEL PARTY

35%	Spouse/partner only
17%	Family by ourselves
14%	Alone (just myself)
14%	Group of friends
7%	Couple, with other couples
6%	Other family group by ourselves
4%	Family, with other families
1%	Part of club or organised group
0%	Other
2%	Don't know

IDEAL BIKE USE

37%	Rented bike
28%	My own bike
19%	Rented e-bike
8%	My own e-bike
0%	Other
7%	Don't know

IDEAL GRADE

37%	**Easiest** (grade 1)
45%	**Easy** (grade 2)
16%	**Intermediate** (grade 3)
2%	**Advanced** (grade 4)
0%	**Expert** (grade 5)
1%	A mix of grades

IDEAL SUPPORT LEVEL

26%	**Full support**
43%	**Partial support**
27%	**Independent trip**
4%	**Don't know**

NGĀ HAERENGA GREAT RIDES NEW ZEALAND – VISITOR EXPENDITURE

NGĀ HAERENGA GREAT RIDES NEW ZEALAND – VISITOR EXPENDITURE

The following pages look at the recent expenditure of Ngā Haerenga Great Rides New Zealand trail users, as measured through the Ngā Haerenga New Zealand Cycle Trails user survey. The charts cover the expenditure of trail users that visited the area in which the trail they used is located. They do not cover any expenditure of trail users that live in the area in which the Great Ride is located. Average per person expenditure is plotted based on two variables – expenditure for all the time spent in the area, and expenditure per night. Generally, high expenditure for both variables is most desirable in terms of economic impact (i.e. relatively high spend per night and relatively long length of stay).

VISITOR EXPENDITURE BY USER CHARACTERISTICS

Based on the data presented, the highest value Great Ride user types currently are those using trails for four or more days, Australians, and e-bike users. Other groups above average are those for who the Great Ride is the main reason for the trip, Aucklanders, those aged 60 or more, and those who are spending at least one night on a trail.

The lowest value users currently are those aged under 30 and bike packers. Other user types below average include first time users, those not on e-bikes, those not on a multi-day trip on a trail, those walking or running, and event participants.

VISITOR EXPENDITURE BY GREAT RIDE

The Great Rides currently attracting the highest value visitors are Otago Central Rail Trail, West Coast Wilderness Trail, The Queenstown Trail, and Alps 2 Ocean Cycle Trail. The lowest value visitors are currently found on Hauraki Rail Trail, Remutaka Cycle Trail, Motu Trails and St James Cycle Trail.

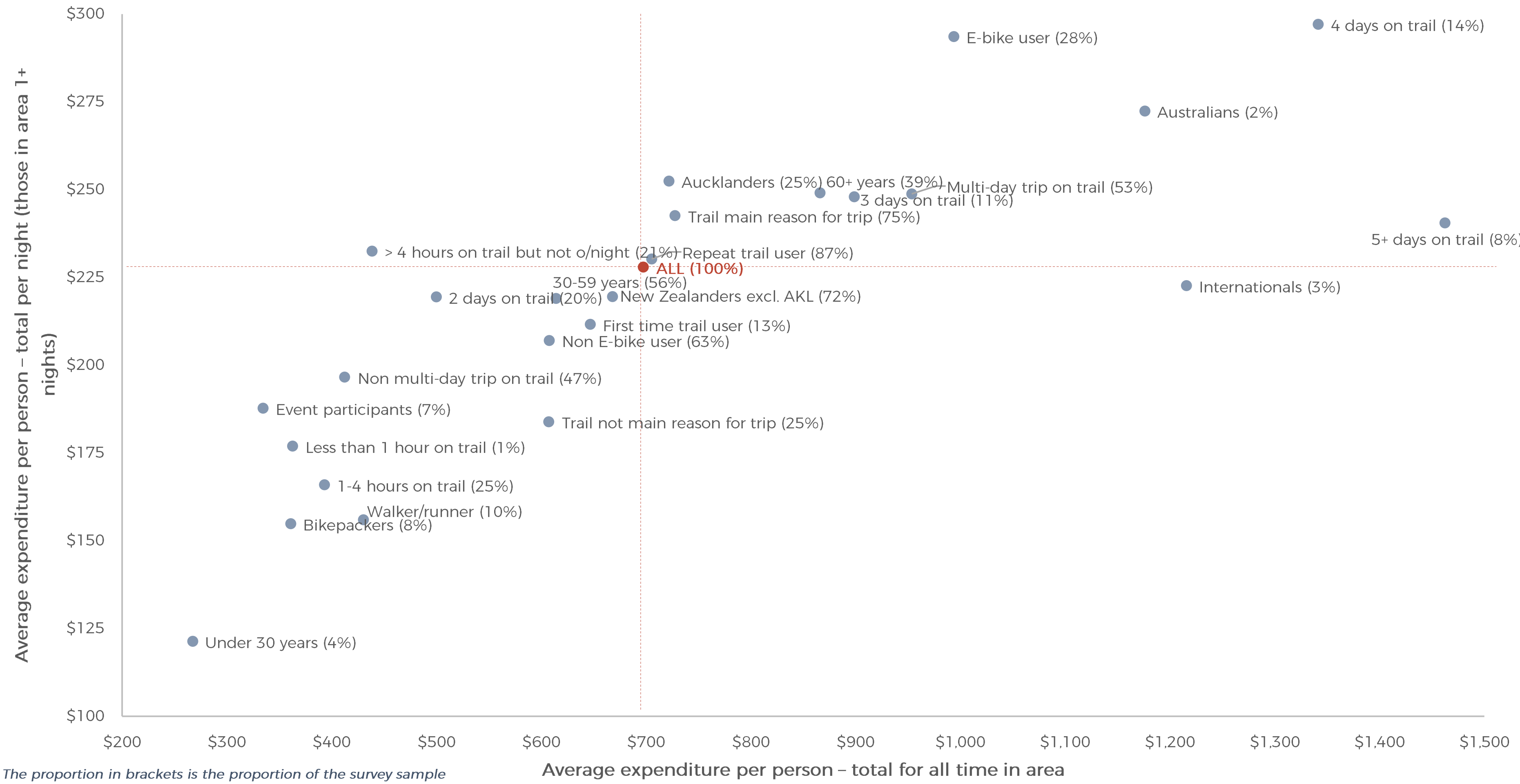
OTHER CONSIDERATIONS

The expenditure information presented does not take into account the lifetime value of a trail or trail user type (e.g. one Great Ride may have a much higher volume of visitors than another, and one user type may be more likely to visit Great Rides repeatedly than others). If this could be factored in, the view of where highest value lies may differ.

Also not accounted for are host community aspirations for value generation (this is not necessarily centred on high spenders), the costs associated with different user types or different trail use, and the potential a trail has to generate value (e.g. shorter trails are more likely to sit lower, trails outside of populated areas are likely to require use of commercial accommodation etc). The information does however show variances and provide a starting point for further discussion. The value of a portfolio approach should also be considered in terms of spreading risk and not relying on a small number of user types or trails to provide economic benefit.

VISITOR EXPENDITURE – BY CHARACTERISTICS

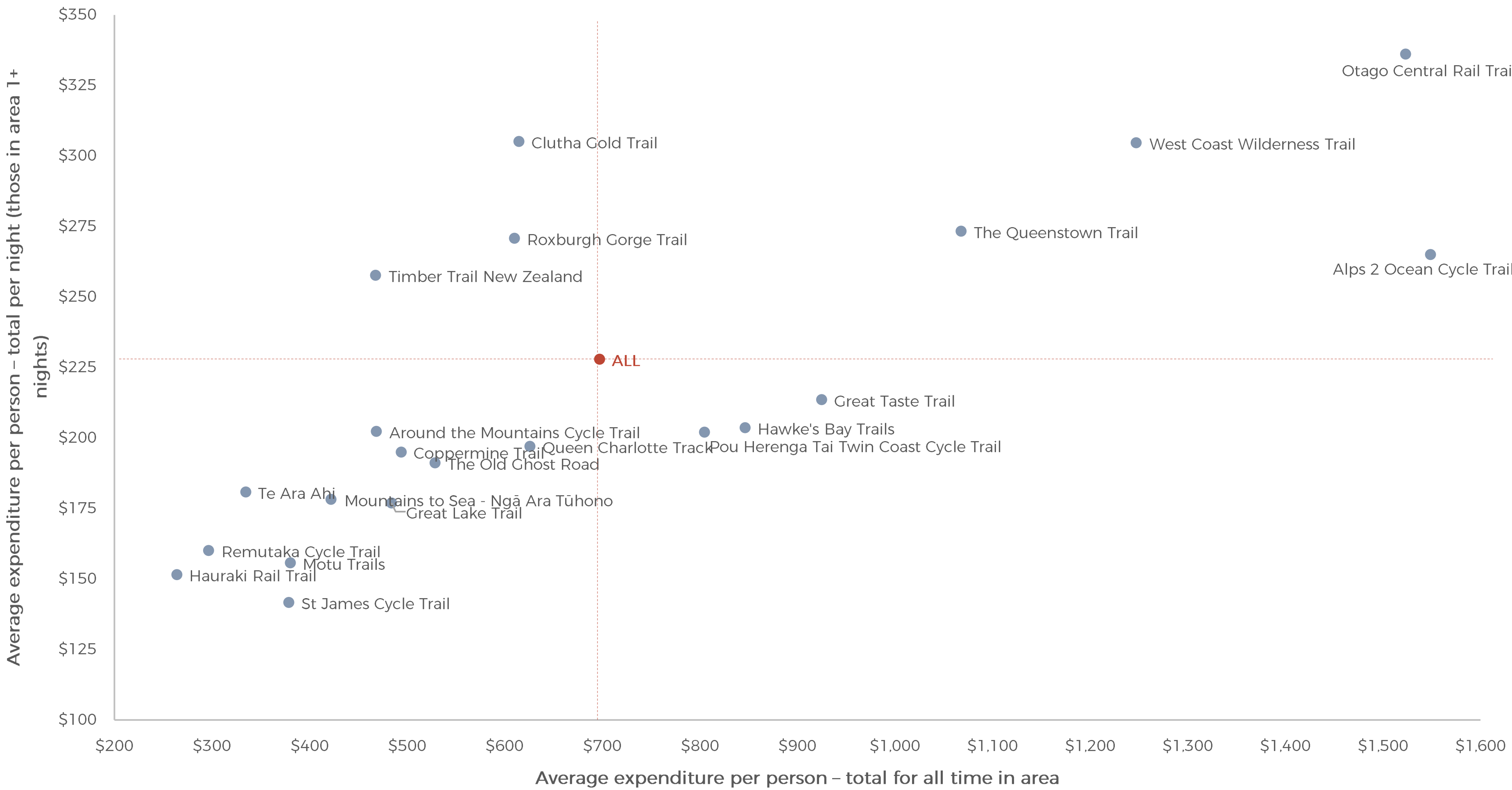
Expenditure during entire visit to the area (i.e. including time spent on and off Great Ride, and prepaid costs)



The proportion in brackets is the proportion of the survey sample that the user group represents. This may differ from actual incidence.

VISITOR EXPENDITURE – BY TRAIL

Expenditure during entire visit to the area (i.e. including time spent on and off Great Ride, and prepaid costs)



Base: n=4,104 – Great Ride trail users visiting area, Ngā Haerenga New Zealand Cycle Trails User Survey (May 2020 – August 2021)

MARKET DEMOGRAPHICS

MARKET DEMOGRAPHICS

	Domestic	Australia
Gender:		
Male	50%	50%
Female	50%	49%
Life stage		
Single, never had children	25%	22%
Married/couple, never had children	16%	16%
Single with children living at home	6%	9%
Married/couple with children living at home	30%	35%
Single with children who are no longer living at home	5%	6%
Married/couple with children who are no longer living at home	14%	11%
Other	3%	1%
Base: Total Sample	n=752	n=752

	Domestic	Australia
Age:		
18-29 years	29%▲	18%▲
30-39 years	22%▲	26%▲
40-49 years	20%	23%
50-59 years	13%	15%
60-69 years	10%▼	11%▼
70+ years	6%▼	6%▼
Base: Total Sample	n=752	n=752

No significant differences are evident in the gender split of the total populations (based on survey screening data), and the gender split of the domestic and Australian cycle tourism markets (as determined by the survey qualifying criteria). However, in the Australian cycle tourism market, females are under-represented in the *current* market (this is not the case for the *prospective* market).

The Australian *prospective* cycle tourism market is less likely than the *current* cycle tourism market to include couples with children at home, and more likely to include couples with children no longer at home.

For both the domestic and Australian cycle tourism markets, the *current* market is relatively younger than the *prospective* market.

▼/▲ Denotes significant difference relative to the Total Population (based on survey screening data), expressed at a 95% confidence level

MARKET DEMOGRAPHICS CONT.

	New Zealand
Region of Residence:	
Northland	3%
Auckland	38%
Waikato	10%
Bay of Plenty	4%
Gisborne	1%
Hawke's Bay	3%
Taranaki	2%
Manawatu-Whanganui	4%
Wellington (& Wairarapa)	10%
Tasman	1%
Nelson	1%
Marlborough	0%
West Coast	1%
Canterbury	15%
Otago	5%
Southland	2%
Base: New Zealand Residents	n=752

	Australia
State of Residence:	
New South Wales	30%
Queensland	21%
Victoria	28%
Western Australia	10%
South Australia	8%
Australian Capital Territory	1%
Northern Territory	0%
Tasmania	2%
Base: Australian Residents	n=752

No significant differences are evident in the geographical spread of the Total Population (based on survey screening data), and the geographical spread of the Cycle Tourism Market (as determined by the survey qualifying criteria).

MARKET DEMOGRAPHICS CONT.

	Domestic	Australia
Annual Household Income*		
$0 - $19,999	4%	2%
$20,000 - $39,999	10%	11%
$40,000 - $59,999	12%	14%
$60,000 - $79,999	13%	14%
$80,000 - $99,999	15%	14%
$100,000 - $119,999	10%	9%
$120,000 - $139,999	7%	6%
$140,000 - $159,999	8%	7%
$160,000 - $179,999	3%	3%
$180,000 - $199,999	3%	5%
$200,000 - $249,999	3%	3%
$250,000 +	2%	4%
Prefer not to answer	11%	7%
Base: Total Sample	n=752	n=752

	Domestic	Australia
Disability**		
Seeing – at least some difficulty, even if wearing glasses	18%	18%
Hearing – at least some difficulty, even if using a hearing aid	14%	8%
Walking or climbing steps – at least some difficulty	17%	18%
Remembering or concentrating – at least some difficulty	19%	16%
Washing all over or dressing – at least some difficulty	4%	4%
Communicating using your usual language – at least some difficulty	6%	3%
Disability Incidence	41%	36%
Base: Total Sample	n=752	n=752

A higher proportion of the Australian *prospective* cycle tourism market is disabled than the *current* cycle tourism market – suggesting that in order to grow the market, more may need to be done to cater to people with disabilities

** As currency was not stated domestic respondents can be assumed to be answering based on their household income in NZ$ and Australian respondents can be assumed to be answering based on their household income in AU$*

*** Based on the Washington Group Short Set (WGSS) of Questions on Disability. The WGSS has been designed to identify individuals who are at greater risk than the general population of experiencing restricted social participation because of difficulties undertaking basic activities.*

MARKET DEMOGRAPHICS CONT.

Ethnicity	Domestic	Australia
Australian	3%	81%
New Zealand European	64%	1%
Other European	6%	7%
New Zealand Māori	11%	1%
Chinese	7%	5%
Indian	5%	4%
Other Asian	5%	4%
Samoan	2%	0%
Middle Eastern	1%	1%
Other	6%	2%
Prefer not to say	2%	1%
Base: Total Sample	n=752	n=752

Birthplace*	Domestic	Australia
New Zealand	70%	2%
Australia	2%	78%
Other country	28%	20%
Base: Total Sample	n=752	n=752

If born outside country of residence...

When arrived to live in New Zealand or Australia	Domestic	Australia
Within the past 5 years	12%	16%
Within the past 6-10 years	21%	13%
Within the past 11-20 years	32%	29%
More than 20 years ago	34%	42%
Base: Born outside country of residence	n=222	n=169

*27% of the New Zealand population and 30% of the Australian population was born overseas. The domestic cycle tourism market slightly over-represents those born outside the country, while the Australian cycle tourism market slightly under-represents those born outside the country.

https://www.stats.govt.nz/news/new-zealands-population-reflects-growing-diversity
https://www.abs.gov.au/media-centre/media-releases/30-australias-population-born-overseas

Ngā Haerenga
NEW ZEALAND CYCLE TRAILS

angus
& ASSOCIATES