



West Coast Cycle Trail Review

Current Status & Strategic Direction

for

WEST COAST NEW ZEALAND
UNTAMED NATURAL WILDERNESS

**UNTAMED
NATURAL
WILDERNESS**

These tools are the start of a journey that will translate into a better connected, integrated and funded network of trails. That will underpin the intention of more New Zealander recreational cyclists, coming to the West Coast to cycle, more often – which will help transition the West Coast region to a new economy.

Outcomes/Findings

- Finish what we've got
- Secure funding for maintenance and operation
- Create groups to initiate operation model

The Journey

1

The West Coast region is in an economic transition

from extractive mining economy/ primary produce to a tourism destination.

2

To achieve this transition

there has been significant public sector investment in tourism, including cycle trail establishment.

3

This initial investment by public and private sectors is generating cycle tourism visitation

across the region, primarily for New Zealanders, and starting to generate a wider economic benefit.

4

Funding the maintenance and operation of the established trails now (and into the future) is a major operational risk

- achieving a successful transition
- attain the forecast economic benefits
- bring about the direct spend to local businesses and the community

5

Creating a sustainable trail network

Engagement, investigation and research has been completed by Development West Coast, Beca and Select Contracts together with a representative group of Stakeholders. This has developed:

- A sustainable trail network strategy
- Cycle Trail Factbook
- Sustainable operational models

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These four strategies are our areas of focus in this document

The document illustrates

- Existing Facts
- Focus on the customers
- Network model
- Identifying gaps in the model and Barriers to investment
- How to enhance the Customer Experience
- Sustainable model
- Pre investment appraisal
- Strategy actions

There is an opportunity to develop a strategy to link the cycle trails together and address ongoing maintenance and operational costs.

This strategy and the recommendations have been developed to address this opportunity.

The strategy has been developed through engagement with stakeholders.

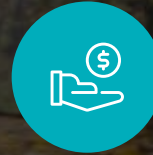


#Untamed Wilderness

Destination Management

Customer

- New Zealanders, young & old
- Outdoor family adventure
- Repeat visitation
- Distinct clusters
- Safe journeys



Experience

- Finish the current trails (investment)
- Amazing scenery and heritage story
- Choose your level of adventure
- A mix of trail grades
- Improve amenity value

West Coast Strategy

Supercharge our growth through Destination Management of the Wild West Coast Trail Network

Hosts

- The best hosts
- A network of amenities
- Quality not quantity
- Leverage through destination development & management



Operations

- Value the product we have
- Monetise our assets
- Sustainably fund trail operations
- Connected experiences
- Resilient infrastructure

Cycle Tourism Growth

Transitioning from extractive mining economy/primary produce to a tourism destination

The initial public sector and private sector investment in Cycle Trails across the West Coast region has generated increased cycle tourism visitation, primarily for New Zealanders, and it is starting to generate a wider economic benefit. This section identifies the opportunities for further growth in the West Coast economy based around enhanced and developed cycle and walking trails.

Visitation mix

90:10

Future (10-20 years)

70:30

Size of the prize

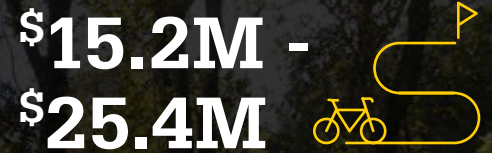
Cycling and walking numbers growth*



*Basis

- 4% growth per annum up to year 5
- 2.5% growth per annum to year 10
- 2% growth per annum to year 20

Tourism spend in 20 years



** Based on an average spend of \$142 pp over an average of 3.0 days on the trail and includes a multiplier of 73%.

A change from rate payer to user pays model can provide potential revenue for operations

Step 1

Establish a story to sell the cycle trail development journey. Identify key pressure points on the trails where clear improvements can be made. Introduce signage, QR Codes and links across the network including associated businesses that tell this story and encourage donations.

Step 2

Develop a West Coast Trails app and website that promotes the trails, the benefits and connects the dollar donated to the outcomes on the trail.

Step 3

Associated businesses charged a fee to advertise on the App and website.

Step 4

Businesses contribute via a licensing model. Associated businesses contribute a percentage of annual earnings (3%) towards the sustainability of the trails.

Step 5

Opportunities to increase donations as the network service offering is enhanced.

On trail

Accommodation can generate revenue, but limited trails have this option.

Permit options

A significant portion of West Coast trails are located on DOC land. The purchase of permits for use of the trails may be appropriate for some parts of the network (ie. private or public land). This option will not provide a consistent future income regionally.

Donation Capture by users

In 10 years \$426 average spend x 10%*

\$42pp

Donation capture of per annum for trails

\$2m

Expenditure = Average \$ Spend \$142 walkers & cyclists)

* Average no. of days (walkers & cyclists = 3.0)

In 20 years \$450 average spend x 20-25%*

\$100pp

Donation capture of per annum for trails

\$8.2m

Expenditure = Average \$ Spend (\$142 walkers & cyclists)

* Average no. of days (walkers & cyclists = 3.2)

*Basis

- Ability to 30% charge to the trail user on top of their Visitor expenditure
- this percentage represents an increasing donation capture that could be realised

So what?

Growth in trail network users means higher potential revenue and expenditure on the West Coast. Progression towards a user pays model will provide revenue that could enable a sustainable operating model for the trails into the future.

Matched Funding undertaken at a cluster or destination level will increase outcomes.

Macro-economics of West Coast

Population

34,608



10,150

Buller District

13,550

Grey District

8,890

Westland District

Living

43.3%



Rural

56.7%



Urban

Visitors



Annual spend per year

\$200.4m

Domestic

\$269.2m

International

Lonely Planet

Website identifies West Coast at:

No.12 of the 'Top Sights in New Zealand' (list of 20)

New Zealand Cycle Trust

'Best family rides'

#2 Wilderness trail

New Zealand's longest and highest singletrack

#1 Old Ghost Road

Tripadvisor Top West Coast Outdoor activities

#1 Old Ghost Road

#12 WCWT

#46 Point Elizabeth Walkway

#65 Kawatiri River Trail

#89 Paparoa Track

New Zealand cycle trails

Top cycling markets



International visitors go cycling

179,000 **53%**

Growth since 2015

International visitors ride NZ cycle trail

49,000 **96%**

Growth since 2015

New Zealand cycle trail riders

23%  **77%**
Local Visitors

Female to male ratio

49%  **51%**
Female Male

Cyclists

57% 
50 - 69 years old

Visitors

13.5% **86.5%**
International Domestic

Average spend for rider / day

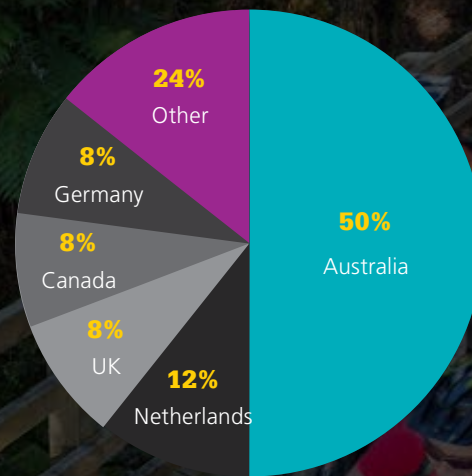
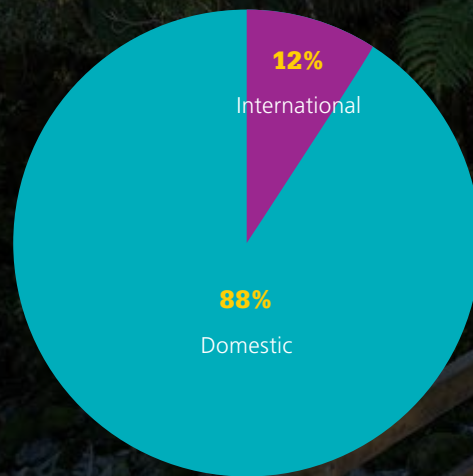
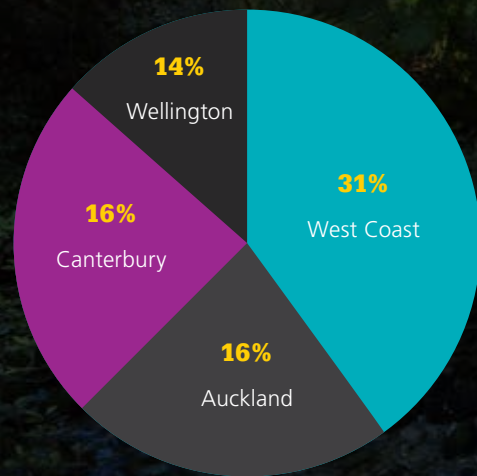
\$207  **\$173**
International Domestic

Visiting the area

82% **57%**
Visited because of the cycling/walking trail Spend 2 days or more on the trail

West Coast cycle trails

Visitors to the area



Average spend

rider per day

\$208

West Coast Wilderness trail

\$134

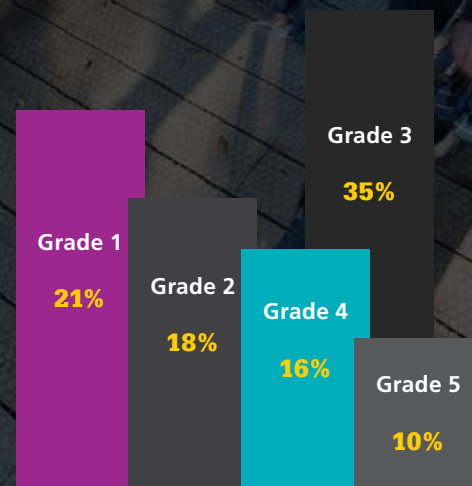
Old Ghost Road Trail

Average length of stay

2.9 **3.9**
 days on trail days on coast

Cyclists

77%
 50 - 69 years old



59% **#1**
 of established trails are the great rides reason people ride the trail is for the scenery

Current Cycle trails

End to end trail offerings



1

West Coast
Wilderness Trail
132km



2

Old Ghost
Road
85km



3

Heaphy
Track
78.4km



4

Paparoa
Track
56.2km



5

Kawatiri Coastal
Trail
55km

1

Predominantly Grade 2
with some Grade 3 sections

2

Grade 4
with some Grade 5

3

Grade 3
with some Grade 4

4

Grade 4

5

Grade 2

Estimated **cyclists** per annum (current)
does not include commuter trips

8,500

9,500

2,000

Not available

Not available

Estimated **walkers** per annum (current)
does not include commuter trips

3,000

3,000

10,000

Not available

Not available

Total individual users (average)

11,500

12,500

12,000

Not available

Not available

Other cycle trail destinations include:

- Denniston Plateau
- Charming Creek
- Blue Spur Tracks

Non-financial benefits



Social capital

Enhancing local communities



World class

Cycling and walking trails that West Coast towns can be proud of



Community identity and road safety

Enhanced by cycle trails and based on qualitative evidence



The social contribution

The economic benefits of the NZ Cycle Trails was estimated to be \$12.0M. These benefits were derived from reduced mortality benefits, commuting benefits and cost savings from diseases associated with physical inactivity.



Mental health

Well-being benefits

Natural capital

- Cycle and walking trails can help protect and showcase the natural environment on the West Coast
- Trails can be used to run surveys and pest trapping and monitoring programmes
- Cycling and walking trails are relatively low-impact recreational activities

Financial and physical capital

- Cycling and walking trails act as catalysts to wider economic benefits
- Infrastructure to support trail users will also benefit other forms of tourism
- The NZCT evaluation showed that the cycle trails helped revitalise small communities including historic hubs, increased and expanded the number of local businesses, and created jobs close to the locality of the trails

Human capital

- Build capability skills that are directly involved in trail construction
- Build capability and skills in supporting sectors such as bicycle stores, transport operations
- Provide additional career pathways into cycling, walking, and supporting industries on the West Coast



A key part of the strategy is to focus on customers

Our customers are cyclists and walkers

- New Zealanders, young and old
- Outdoor Family adventure
- Repeat Visitation
- Distinct Clusters
- Safe Journeys



Customer

Neighbourhood/
family cycling

Description

- Local trips for accessibility to local schools, parks and shops as well as small family trips for recreation

Destination Management

- Use localised cycle network and short recreational trails adjacent to natural environments to perform small daily activities



Commuter cycling

- Teenagers and adults commuting to and from work or school with a general travel range <15km

- Use a localised cycle network to perform small daily trips



Sports cyclist

- Travel specifically to participate in a variety of cycling, running or multi-sport events

- Time constrained and will only travel for the event itself with minimum time spent at other tourist attractions.



Recreation cyclist

- Participating for leisure and place a high value on enjoying the experience. Less constrained in time and vary widely in skill and experience

- Will generally stay within an area with a good network of easy to access trails
- Prefer catered facilities and good rest areas and will generally cycle within a hub of trails
- Pre-packaged options accommodation, food, and transport options are attractive as they save time



Touring cyclist

- Touring cyclists travel long distances carrying camping gear and provisions
- Prefer high-quality road surfaces, wide shoulders and lightly trafficked back roads
- Rest areas, camping facilities and accommodation are important

- Will generally only pass through an area once
- Displays a range of accommodation preferences from basic camping to luxury accommodation



Great walker

- Can be a domestic or international visitor
- Seeks out the Great Walks of New Zealand due to the successful brand, certainty of experience and quality accommodation and paths

- Will travel directly to towns located most closely to the start/end of the trail
- May spend an extra day or two either side of the walk itself experiencing other tourism/cultural attractions



International
day walker

- Travelling New Zealand for a short period of time (less than 1 month)
- Attracted by the Great Walks brand but does not possess the skills or equipment necessary to undertake the full walk
- Will only walk the start/end of the trail and exit on the same day

- Generally, does not spend a lot of time in one area due to the short duration and nature of their trip

Network Model

The Untamed Wilderness Network Model presents the components which would make up an ideal experience for a cycle or walking tourist to the West Coast. It shows the parts of a network that the customer interacts with on a scale of significance (ie. Local vs National). The network places the customer at the centre of the model and gives an indication of their individual service preferences. Each customer has a different set of preferences which are generally grouped into:



Experiences

the trails and directly related trail facilities



Network/ Infrastructure

requirements of a trail network including building and access to the trails



Amenity/Services

supplementary products required by customers



Complementary Experience

activities that will contribute to the overall experience for the customers



Connectivity

connections to and from the West Coast as well as around the region



The model conceptually describes the network...

- Understanding the current range of products available to each type of customer
- Identifying gaps and opportunities within the current product offering
- Viewing the cycle trail network from a holistic perspective
- A 'system' approach to sustainability, servicing and investment
- This model will assist in providing direction for investment in future projects

Overall Network Model

Network / Infrastructure



Family



Commuter



Sports cyclist



Recreational cyclist



Touring cyclist



Great walker



International walker

The West Coast Host



Gaps in the model

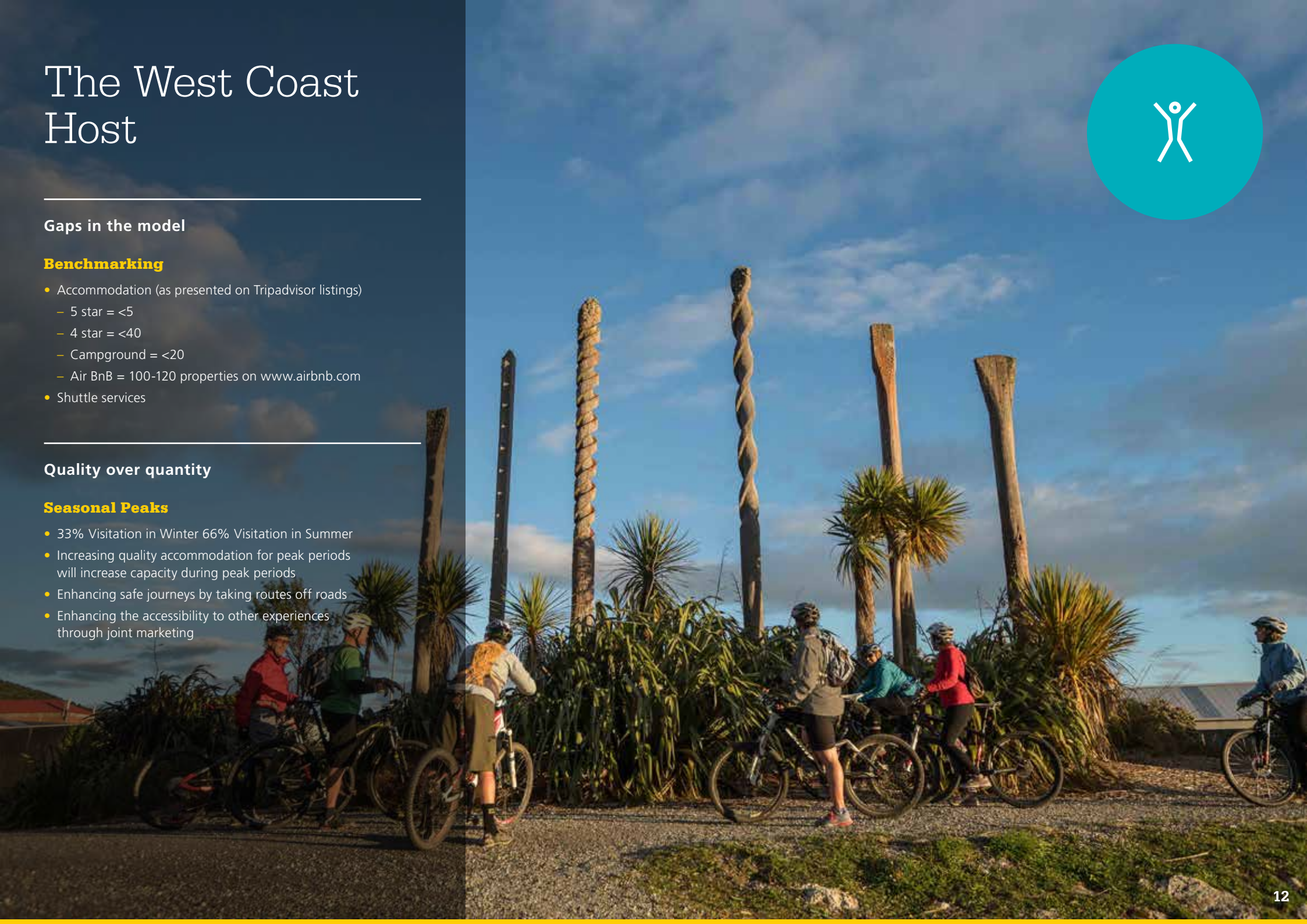
Benchmarking

- Accommodation (as presented on Tripadvisor listings)
 - 5 star = <5
 - 4 star = <40
 - Campground = <20
 - Air BnB = 100-120 properties on www.airbnb.com
- Shuttle services

Quality over quantity

Seasonal Peaks

- 33% Visitation in Winter 66% Visitation in Summer
- Increasing quality accommodation for peak periods will increase capacity during peak periods
- Enhancing safe journeys by taking routes off roads
- Enhancing the accessibility to other experiences through joint marketing



Barriers to Investment

There are a number of existing barriers faced by several cycle trails that can affect the overall cycle experience on the West Coast for the targeted customers. These Barriers create challenges for the West Coast becoming reputable as the 'best hosts'.



Customer

The gaps in the network are:

- limited grade 2 trails which are good for families
- safety concerns for riders on sections of the WC cycle journey



Hosts

The gaps in the network are:

- limited connectivity with existing domestic flight schedule and passenger rail access to the West Coast



Experience

- Trail Infrastructure Resilience
- Perceived Weather
- Perceived Isolation



Operations

- Licensing Uncertainty for Private Operations (Tenure of Licence linked to Concessions)
- E-Bikes Concession / DoC Policy (National Policy Uncertainty)
- Land Status and Access
- Population Decline / Government Confidence
- Resources to lead Horizon 3 – 5 thinking
- Back of House including
 - Chainsaw Ticket
 - Safety Plans and JSA's
 - Remote Working Policy (2 resources)
 - Standard Technical Specifications
 - Use of Shared Materials (Hokitika Gravels)
 - Track Building Roster and Volunteers
 - KPI's for Operations (Days open)

Sustainability of untamed wilderness brand relies on safety of all users ie. for riders doing the **Aotearoa cycle trail**, the cycle safety between Ross and the Glaciers is a concern. A serious accident could impact on the perception of cycle trails being safe for all.

Experience

Opportunity to combine experiences and establish Clusters of Cycle Trails as shown in the map below:

- 1. Karamea to Westport (Buller DC)
- 2. Reefton to Punakaiki (Grey DC – Buller DC)
- 3. Greymouth to Ross (Grey DC – Westland DC)
- 4. Ross to the Glaciers (Westland DC)



Existing Cycle and walking trails

There is an existing network of trails which are all at various stages of maturity. There are also several projects which are in the planning, funding application or construction phases. These are illustrated in the following District maps.

Each District identifies quick win and longer term projects which will enhance the existing cycle and walking offering for the West Coast.

The engagement identified there are no gaps in the current experience on offer and the focus should be on finishing the current trails.

Each District identifies quick win and longer term projects which will enhance the existing cycle and walking offering for the West Coast.

Creating Clusters

Distinct clusters of cycle trails within each of the districts will provide opportunities for streamlining current trail operations. Benefits of clustering operations include:

- Connect Economic Geography
- Joint Marketing
- Improve Economic Density
- Increase Sustainability

In New Zealand there are several examples of successful cycling hubs which present a clustered approach. Clustered cycling developments are attractive for tourists and present opportunities for additional bed nights and increased spending.



Potential clusters

Buller District

Scope	Strategic fi	Type
Kawatiri trail construction	Customer <ul style="list-style-type: none"> • Safer journey • Outdoor family adventure 	Quick win
Charming Creek Improve current trails	Experience <ul style="list-style-type: none"> • Finish the current trails 	
Denniston Plateau trail	Customer/Experience <ul style="list-style-type: none"> • Finish the current trails • A mix of trail grades 	Long term
Reefton cycle network enhancements	Experience <ul style="list-style-type: none"> • Choose your level of Adventure • A Mix of trail grades 	Long term
Kawatiri trail network development		
Expand trail offering		

Grey District

Scope	Strategic fi	Type
Paparoa track	Experience <ul style="list-style-type: none"> • Finish the current trails 	In progress

Westland District

Scope	Strategic fi	Type
Township loop trail upgrades	Experience <ul style="list-style-type: none"> • Finish the current trails 	Quick win
Mahinapua loop track	Experience <ul style="list-style-type: none"> • Finish the current trails • Choose your level of adventure 	Quick win
Work with NZTA and road controlling authorities during cycling and walking events to temporarily lower speed limits for sections of trail that are on-road	Experience <ul style="list-style-type: none"> • Safer journeys 	Quick win
On trail accommodation improvements	Hosts <ul style="list-style-type: none"> • The best hosts • Quality not quantity 	Long term
Milltown Causeway / bridge upgrade	Operations <ul style="list-style-type: none"> • Resilient infrastructure 	Long term
Relocate / upgrade cycle connection between Ross and the glaciers (engage with NZTA on funding opportunities for this project)	Customer <ul style="list-style-type: none"> • Safer journey 	Long term



Operations



Potential Model for Growth and Sustainable Operations

Component	Status	2-5 years	5-10 years	10-15 years	15 years
Level of maturity	Start-Up	Low	Medium	High	Sustainable
Typical overhead cost	Volunteer or Single Resource	3%	3-5%	5-8%	8-10%

competitive model ► **joint model**



Network outcomes **increase visitors ► grow network ► increase revenue ► fund maintenance**

Commercial structure	2-5 years	5-10 years	10-15 years	15 years
• Trust / Not for Profit	• Regional Advisory Group	• Formal Structure with Regional Advisory Group	• Formal Structure with Cluster Representation Governance Model/ structure	• Formal Structure with Governance Model

Funding model	2-5 years	5-10 years	10-15 years	15 years
• Ratepayer / Central Government / Philanthropy Funded • Matched Funding at a Trail Level	• % of Marketing Revenue to support Shared Services • User Donations for specific trail product Matched Funding at a Cluster Level	• Increased % of Marketing Revenue to support Joint Operations Services • User Donations for operations • % of revenue from Licensing • Matched Funding at a Regional Level	• User Pays • Licensed Model • Revenue invested	

rate payer ► **user pays**

Sustainable operations	2-5 years	5-10 years	10-15 years	15 years
• Reactive Maintenance	• Joint Service and Marketing funded • 2 Year Plan Identified	• 2 Year Plan Identified	• 5 Year Plan identified, and 2 year funded	• 10 Year Plan identified, and 5 year funded

reactive maintenance ► **proactive maintenance**

Strategy and operation risks • Progression towards a joint model will provide opportunities to mitigate strategy and operation risks as identified in the table above.

Operational Quick Wins / Long Term Investment

years	Strategic fit	Recommended network model investment
0-5	Customer <ul style="list-style-type: none"> • Distinct Clusters • Safer Journeys Experience <ul style="list-style-type: none"> • Finish the current trails Operations <ul style="list-style-type: none"> • Value of the product we have 	<ul style="list-style-type: none"> • Joint marketing to enhance accessibility to experiences • Enhancing safety by removing road sections • Enhancing experience through investment in existing trails and trail links • Enhancing sustainability of the trail operations through distinct clusters
5-10	Operations <ul style="list-style-type: none"> • Value of the experience Hosts <ul style="list-style-type: none"> • A Network of Amenities 	<ul style="list-style-type: none"> • Improved Network infrastructure • Enhancing the network of amenities and services
10-15	Operations <ul style="list-style-type: none"> • Connected experiences 	<ul style="list-style-type: none"> • Packaging experiences
15-20	Experience <ul style="list-style-type: none"> • Choose your level of Adventure 	<ul style="list-style-type: none"> • Complementary experiences to incorporate adjacent to new trails

Pre-Investment Appraisal

Component	Network model contribution	Yes/ No
Network Model Component Type	<ul style="list-style-type: none"> • Experience • Complementary Experience • Connectivity • Amenity / Service • Network Infrastructure 	
Alignment	<ul style="list-style-type: none"> • West Coast Regional Strategy • Stakeholder Objectives • Provincial Growth Funds 	
Governance Model	<ul style="list-style-type: none"> • Owner/ Proponent • Partnership • Operator 	
Capability to Deliver / Operate	<ul style="list-style-type: none"> • Volunteer Depth / Sustainability • Operating Model Type 	
Land Access / Ownership	<ul style="list-style-type: none"> • Private • Public • Sensitive Land 	
Key Outcome Metrics	<ul style="list-style-type: none"> • Environmental / Cultural • Economic / Social 	
Key Private Sector Indicators	<ul style="list-style-type: none"> • Intentions / Confidence • Buy, Hold, Sell, Invest Metrics 	
Key Business Performance Metrics	<ul style="list-style-type: none"> • OPEX • CAPEX • Ratio of Private: Public Money 	
Ability to Catalyse	<ul style="list-style-type: none"> • Adjacencies • Leverage Existing Investment • Leverage New Investment 	



Strategy Actions



- Adopt Strategy, particularly the approach to creating a sustainable model.
- Establish a Regional Advisory Group with existing trail network operators, associated business leaders, and stakeholders.
- Establish Mandate and Terms of Reference for the Regional Advisory Group
- Recruit and appoint an external Independent Chair. This position may require funding or adjusting of current position descriptions to include these strategy actions
- Confirm Clusters and Representation of each Cluster
- Establish a work programme to achieve the strategy outcomes and sustainable model
- Review proposed funding allocations using pre-investment appraisal and modify to achieve the strategy
- Resolve outstanding land access issues through a consistent legal instrument.

Customer and Experience

- Develop a shared services marketing plan based on Clusters to best serve the Region.

#Identify Channels

- Press/print media (newspaper and specialist sector)
- adverts
- content marketing
- video
- editorial
- radio stations
- premium websites.

#Develop Collateral

- Establish West Coast Cycling branding, regional narrative on transitional economy, cluster specific narratives, weather and isolation perceptions, stock footage and photography.

#Test the Collateral and Strategy

- Focus group testing of content and sustainable model approach (user pays, permits and donations) with target market demographics.

#Grow Awareness

- Tell the story, create the momentum, and give the reason on why we want to create a sustainable model.

#Launch the Product

- Cluster specific and supporting digital infrastructure to capture the revenue.

#Build the Brand

- Operational and tactical marketing.

Hosts and Operations

- Continue with implementation of Quick Win Projects
- Develop a shared service operations plan based on Clusters to best serve the Region.

#Trail Infrastructure Resilience

- Set Key Performance Indicator's for Operations (i.e. days open, natural event response times (e.g windfall/washout) and contingency plans for visitors)
- Consolidate 2, 5, and 10 yr CAPEX and OPEX plans for each region, based on each clusters requirements
- Identify base funding, donation requirements, and target licence revenue to achieve plan outcomes
- Consolidate procurement process, specifications, and materials (e.g use of Hokitika Gravels) to create a consistent experience where practical
- Online and real time track building roster and list of volunteers at cluster and regional level.

#Health and Safety

- Standard form of volunteer agreements
- Consistent Safety Plans, Level of Hazard Identification and Job Safety Analysis
- Better planning at a cluster level to meet requirements of Remote Working Policy (min. 2 resources)
- Consolidate training and specialty requirements (e.g chainsaw ticket)

#Stakeholders, Policy and Legislation

- Coordinated response to concessions and ability to commercialise licensing for private operations
- Coordinated engagement to improve regional flight and leverage rail accessibility
- Coordinated approach to e-Bikes policy on DoC Land and concession
- Resolve outstanding land access issues through a consistent legal instrument.

References

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<https://www.mbie.govt.nz/immigration-and-tourism/tourism-research-and-data/tourism-data-releases/international-visitor-survey-ivs/>



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