

PART A: PARTICIPATION RATES

NEW ZEALANDERS (ADULTS AGED 18 OR OLDER)

Weekly participation and participation at least once in the past 12 months for each sport or activity¹
(Most popular activities for adults)

% PARTICIPATED 7 DAYS	% PARTICIPATED 12 MONTHS	Activity
59%	85%	Walking
25%	48%	Gardening
22%	37%	Individual workout using equipment
20%	38%	Running/jogging
16%	32%	Playing games (e.g. with kids)
9%	19%	Group fitness class (e.g. aerobics, cross fit)
9%	33%	Swimming
7%	20%	Road Cycling
6%	16%	Yoga
4%	14%	Mountain Biking

¹Source: Active NZ, The New Zealand Participation Survey (Main Report), Sports New Zealand, 2017

PREPAREDNESS TO TRAVEL (FOR CYCLING AND HIKING)

New Zealand Adults (15+) Who Would Travel More Than Two Hours for Cycling & Hiking²

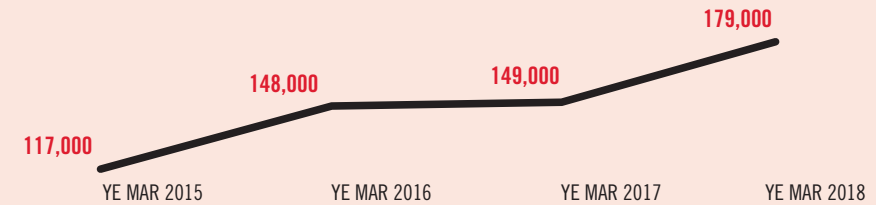
REGION	CYCLING	%	HIKING	%	REGION	CYCLING	%	HIKING	%
Northland	13,932	9%	30,922	21%	Nelson	7,485	16%	13,990	31%
Auckland	151,485	12%	446,195	35%	Marlborough	4,880	11%	12,835	29%
Waikato	42,008	11%	107,901	29%	Tasman	8,377	18%	16,022	35%
Bay of Plenty	31,161	12%	67,767	26%	West Coast	2,597	8%	7,578	24%
Gisborne	3,608	9%	7,585	19%	Canterbury	65,312	12%	165,031	32%
Hawke's Bay	18,302	13%	33,715	23%	Otago	28,781	14%	66,884	34%
Manawatu-Wanganui	17,620	8%	51,726	24%	Southland	8,583	12%	19,717	27%
Taranaki	9,362	9%	22,847	22%	NEW ZEALAND	464,974	12%	1,197,467	30%
Wellington	51,481	12%	126,752	29%					

- The number of people corresponding to an activity is the number of adults aged 15+ who would travel more than two hours within NZ for that activity.
- The percentage shows cycling and hiking interested travellers as a proportion of total adult (15+) population.
- Survey results over 24 months to June 2018.

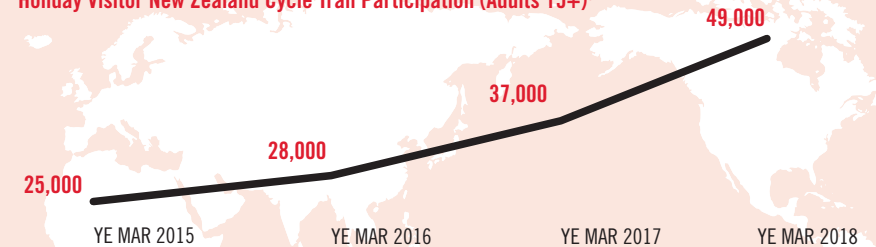
²Source: AA Traveller Monitor 2018

INTERNATIONAL VISITORS

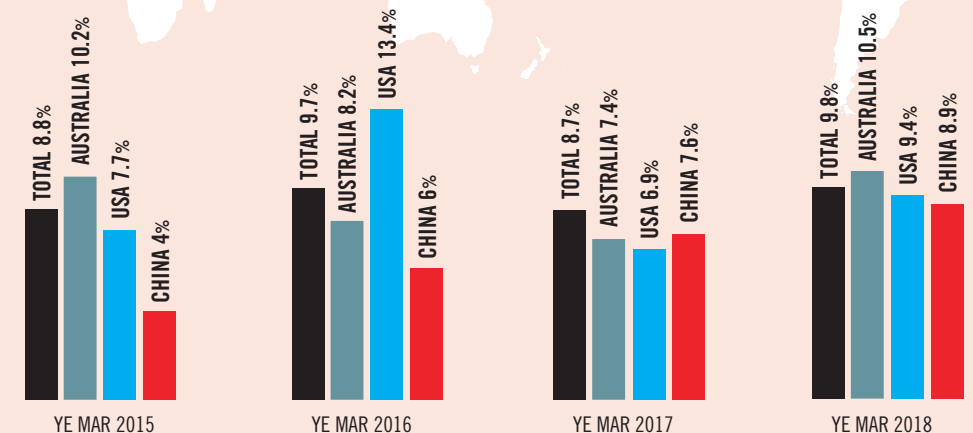
International Holiday Visitors Participating in Cycling (Adults 15+) for the Year Ended March³



Holiday Visitor New Zealand Cycle Trail Participation (Adults 15+)³



Holiday Visitor Cycling Participation Rates³



³Source: International Visitor Survey (IVS)

PART B: RIDER PROFILES

TRAIL USERS BY TRAIL TYPE⁴

AGE	ALL NZ CYCLE TRAILS	EASY	INTERMEDIATE	ADVANCED
15 - 19	1%	0%	1%	1%
20 - 29	3%	2%	5%	5%
30 - 39	11%	8%	8%	17%
40 - 49	22%	17%	23%	27%
50 - 59	34%	37%	36%	29%
60 - 69	23%	27%	23%	17%
70 +	6%	8%	4%	4%
Would prefer not to say	0%	1%	1%	0%

GENDER	ALL NZ CYCLE TRAILS	EASY	INTERMEDIATE	ADVANCED
Male	51%	43%	50%	61%
Female	49%	57%	50%	38%
Gender Diverse	0%	0%	0%	1%

TRAIL USERS BY YEAR 2015 – 2018⁴

AGE	2015-2016	2016-2017	2017-2018
15 - 19	0%	1%	1%
20 - 29	3%	4%	4%
30 - 39	14%	10%	10%
40 - 49	30%	23%	19%
50 - 59	30%	34%	34%
60 - 69	20%	24%	24%
70 +	2%	4%	8%
Would prefer not to say	0%	0%	1%

Note: The 50+ age group represented two-thirds of trail users in the year ended 30 June 2018.

GENDER	2015-2016	2016-2017	2017-2018
Male	60%	50%	48%
Female	40%	50%	51%
Gender Diverse	0%	0%	1%

ORIGIN OF VISITOR⁴

LOCAL OR VISITOR TO AREA	2015-2016	2016-2017	2017-2018
Live in the Area	27%	20%	23%
Visiting the Area	73%	80%	77%

INFLUENCE OF CYCLING/WALKING AS A MAIN REASON FOR DECIDING TO VISIT THE AREA	2015-2016	2016-2017	2017-2018
Yes - I was visiting the area only/mainly because of trail	82%	82%	82%
No - I was visiting the area for other reasons	18%	18%	18%

⁴Source: Ngā Haerenga, The New Zealand Cycle Trail Survey 2015 – 2018 (n=2,003 to 2,633)

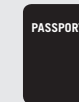
TRAIL USERS⁵

Approximately
1.3 million
TRAIL USERS

83%
17%



Majority were
Domestic Visitors



13.5%
est. 114,350
International Visitors

⁵Source: Ngā Haerenga NZ Cycle Trail Evaluation Report 2016, Ministry of Business, Innovation and Employment, 2016.

PART C: INFORMATION CHANNELS

CYCLING INTERESTED POPULATION²

	15-25	26-40	40-60	61+	TOTAL
TV	35%	23%	30%	31%	29%
Radio	23%	15%	15%	17%	17%
Magazines	23%	33%	44%	59%	42%
Newspapers	17%	22%	31%	51%	31%
Email	24%	26%	26%	32%	27%
Social media	75%	58%	38%	16%	43%
Information websites	58%	75%	77%	66%	71%
Online reviews	53%	59%	47%	34%	48%
Travel books & brochures	50%	48%	50%	65%	53%
Talking to family/friends	82%	75%	79%	77%	78%

1. The percentage of cycling interested people corresponding to an information channel used to get information and ideas about travel (not just cycle trails) in NZ from that information channel.
2. Since people can get information from multiple channels, the percentage across information channels will be greater than 100%.
3. Survey results over 24 months to June 2018.

²Source: AA Traveller Monitor

CHANNELS GENERATING FIRST AWARENESS BY COMPLETION DATE (ALL NZ CYCLE TRAILS)⁴

	2015	2016	2017	2018
From friends, family or work colleagues	56%	57%	61%	51%
From an information centre (including i-SITEs, Department of Conservation Visitor Centres, or other)	11%	15%	10%	12%
From an accommodation provider (e.g. hotel, motel, backpackers/youth hostel)	3%	1%	1%	2%
Newspaper or magazine	25%	16%	15%	19%
Travel guide/book	8%	15%	14%	15%
Trail brochure	9%	15%	14%	16%
Trail website	35%	34%	32%	31%
Social media (e.g. Facebook, Twitter, blog)	12%	7%	15%	13%
Other (please specify)	13%	12%	14%	16%

⁴Source: Ngā Haerenga, The New Zealand Cycle Trail Survey 2015 – 2018 (n = 2,632)

PART E: VISITOR BEHAVIOUR ON TRAILS

RIDER DURATION ON TRAIL⁴

Riders spending more than 2 days on trails has increased from 34% last year to 38% in 2018

	2015-2016	2016-2017	2017-2018
Less than 1 hour	1%	2%	1%
1-4 hours (half a day)	22%	19%	21%
1 day (more than 4 hours)	20%	21%	19%
2 days	30%	24%	21%
More than 2 days	27%	34%	38%

68% of advanced trail users, 58% of intermediate trail users and 53% of easy trail users ride for 2 days or more

	ALL NZ CYCLE TRAILS	EASY TRAILS	INTERMEDIATE TRAILS	ADVANCED TRAILS
Less than 1 hour	1%	2%	1%	0%
1-4 hours (half a day)	22%	27%	21%	12%
1 day (more than 4 hours)	20%	18%	20%	20%
2 days	24%	18%	27%	30%
More than 2 days	33%	35%	31%	38%

GROUP SIZE⁴

Average group size appears to be growing strongly

TRAVEL PARTY NUMBERS	2015-2016	2016-2017	2017-2018
Adults, aged 15 years or more	3.67	3.78	4.48
Children, aged 14 years or less	0.35	0.4	0.26

ADULTS, AGED 15 YRS OR MORE: GROUP SIZE, BY TRAIL TYPE	ALL NZ CYCLE TRAILS	EASY TRAILS	INTERMEDIATE TRAILS	ADVANCED TRAILS
2015	3.6	3.4	3.8	3.5
2016	3.8	3.6	4	4
2017	4	4	4.4	3.9
2018	4.4	3.9	5.8	4.4

⁴Source: Ngā Haerenga, The New Zealand Cycle Trail Survey 2015 – 2018 (n = 2,632)

