

Economic Impact of the West Coast Wilderness Trail

2016/17



WEST COAST

WILDERNESS TRAIL



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Message from the West Coast Wilderness Trail Trust Chair



12 months ago I attended the NZ Cycle Trail annual conference in Wellington. Gathered at the conference were Trail Managers and Governance representatives of the 22 cycleways that comprise the Great Rides Nga Haerenga network. I remember feeling slightly overawed during an “Introduce your Trail” session as one by one each Great Ride rattled off what they had achieved in the past 12 months and the plans they had for future improvements. It seemed at the time that we were well off the pace when lined up beside many of the more well-established trails.

How things have changed in the past year! Our trail has firmly established

itself in the top tier of Great Rides in NZ and other cycleways are starting to take notice of the progress we have made and the way we have gone about achieving the goals we set ourselves when we first established the Wilderness Trail Trust last year. Importantly we are being seen by the governing bodies MBIE and NZCT as being well on the way to establishing a world class tourism product and realising the potential of the trail to bring real economic benefits to the West Coast Region.

While we can give ourselves a pat on the back we cannot afford to rest on our laurels. The Cycle Tourism market is highly competitive and we need to be continually striving for greatness so that we build on the share we have. To maintain the profile of the Trail and make the West Coast Wilderness Trail a “must do” ride on every cyclist’s bucket list, both domestic and international, the Trust is going to need the continuing support of all its stakeholders.

Chris Steel

September 2017

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Acknowledgment

Peer review: Acknowledgement and thanks is extended to David Stapleton of Coast Link Services Ltd for peer review and valuable input into the report.

Executive Summary

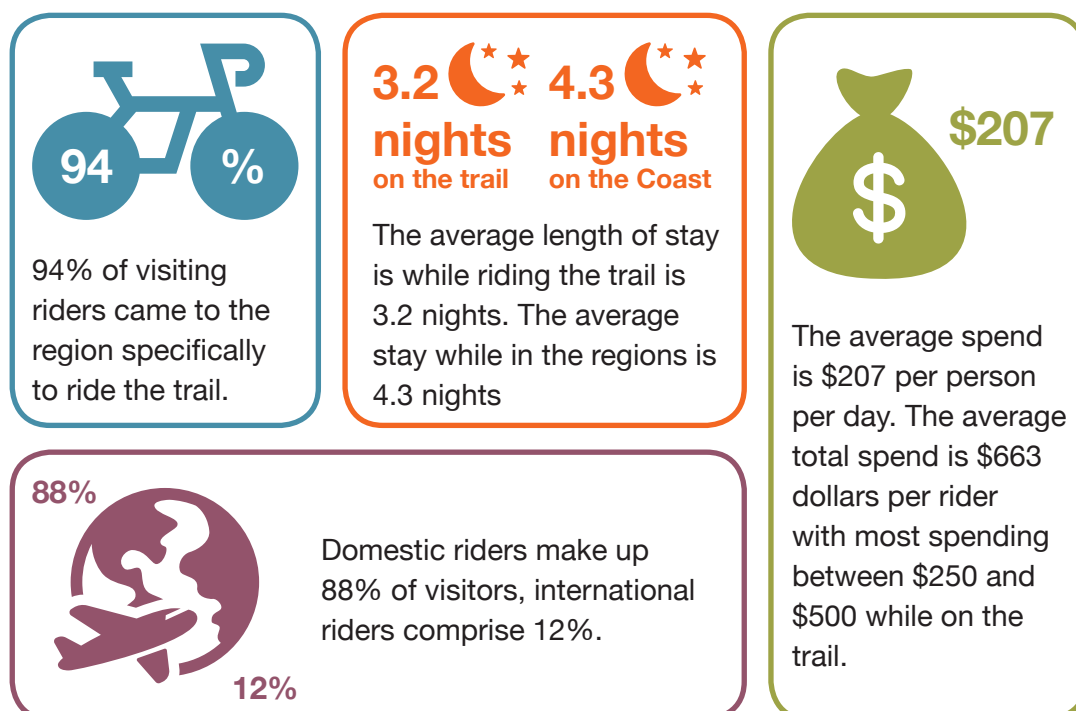
Introduction – A new destination attraction

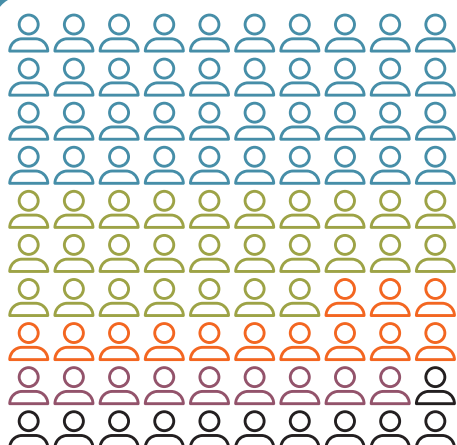
The West Coast Wilderness Trail has developed as a new destination attraction for the West Coast, already bringing an estimated 7,000 - 10,000 additional visitors to the Coast each year. Of those, 94% of riders are coming specifically to ride the Wilderness Trail, with Auckland the predominant region of origin. They stay on average 3.2 nights while on the trail and 4.3 nights in the region and spend around \$207 per visitor per day. Over \$7 million has been invested in direct new business enterprises and over 30 direct full and part-time employment positions have been created. The trail is showing significant growth and the demand for accommodation, attractions and services is growing. To support this activity more businesses are expected to be developed.

Rider Profile – The Ideal Market

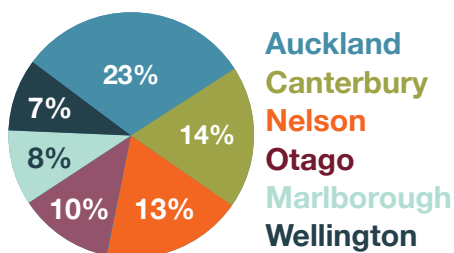
Results from the West Coast Wilderness Trail Trust's first survey undertaken between February and April 2017 of 254 riders present a clear picture of the trail having created a new destination attraction for the Grey and Westland districts into an ideal market. Riders are largely new visitors to the Coast coming specifically to ride the trail. They are predominantly from an older demographic of visitors, many in groups, on holiday with an overall average stay of just over four days in the region. In interpreting the data presented it is important to recognise it has come from just one survey in one period. Measurement of seasonal changes and over several time periods will increase the validity of the findings.

The key findings from the inaugural survey of riders are as follows:





The main age group was 60-69 years (40%) followed by 50-59 (27%), 40-49 (13%) then 70+ (9%). Only 11% of riders were under 40.

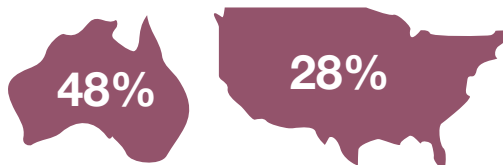


Of visitors from the Rest of New Zealand Auckland (23%) was the most dominant region followed by Canterbury (14%), Nelson/Tasman (13%), Otago (10%), Marlborough (8%) and Wellington (7%).



Of the total riders 7.9% are locals in the remoter section at Cowboy Paradise while 35% are local on the sections close to Greymouth. This provides an indication of recreational use of the trail by locals.

The 16% local use by riders is matched by the number of trail walkers.



Of International Visitors almost half were from Australia (48%), the USA being the second dominant group (28%). These riders are also in the older age categories.



Significantly large groups are proving a popular way to ride the trail with almost half the riders in groups of six or more.



Accommodation and food and beverage are the main areas of expenditure averaging \$282 and \$182 respectively. Of note is the low number and spend on "other" things outside the direct trail activities. This could be due to the focus being largely on the trail or a lack of activities (or knowledge of activities) available.

When compared to the national network of trails, the Wilderness Trail has:

- more riders coming to ride the trail (↑12 percentile points)
- a longer night stay in the area (↑ 0.6 nights)
- more people staying more than 2 days (↑14 percentile points)
- an older age demographic of riders.

Business Growth Related to the Trail

Direct business growth from the trail has seen at least five significant new businesses created and expansions to many others. Over \$7 million has been invested directly into new business creating over 30 new full and part-time jobs. This includes business owners. No multipliers have been applied to these figures. The majority of this has occurred in the Westland district.

Most visible is the revitalisation of Kumara with the rebuilding of the Theatre Royal Hotel, which was up for demolition, the construction of six Miner's Cottages and restoration of four historic cottages in the town. Another example is the Greenstone Retreat, a restored historic villa offering full rooms, dorms, tent and campervan sites. Cowboy Paradise has upgraded the kitchen, saloon and accommodation available. Ross has also benefitted with the development of the Totara Bridge Station beach accommodation.

New services and attractions have also emerged. The Wilderness Trail Shuttle and Trail Transport have been followed by West Coast Scenic Waterways Mahinapua Creek cruises and Cycle Journeys depot and one-stop shop in Hokitika.

A number of businesses have also expanded, particularly bike shops with bike hire.

Growth 2015/16 to 2016/17

Benchmark indications are being put in place to measure growth. To date the main confirmed growth measurement directly relating to the trail comes from the Greymouth i-SITE bookings. While based off low numbers, these show growth in total numbers at 82% in the last year. The spend per visitor over the last two years has risen from \$344 to \$628 per person respectively and indicates 82.5% growth. These figures do not include meals and discretionary spending. During a three night stay breakfasts, lunches, dinners and drinks would likely add \$300 per rider taking the spend per rider up to around \$1000. These figures exceed that of the Trust's survey which contains those DIY planners likely to be looking to spend less. A breakdown of the accommodation spend shows 76% is in the Westland District.

The other confirmed statistics held are the growth from the owner of the Wilderness Trail Shuttle. This business saw a 34% increase in rider numbers and a 40% increase in turnover between the last two seasons.

The number of bikes for hire has risen from 82 to 103 (including 3 ebikes) over the last two seasons. A further 70 bikes including 10 ebikes have already been added for the coming season.

Overall Economic Benefit

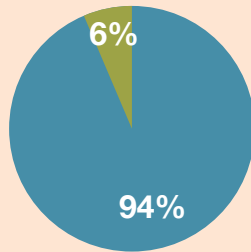
In terms of economic benefits, the West Coast Wilderness Trail contributes the following to the West Coast economy:

- \$207 spend per visitor per day while on the trail
- Between \$4.4 million and \$7.7 million additional spend per annum
- Between 6,631 and 9,000 additional visitors per year
- Between 21,819 and 38,340 additional day visits per year

Conclusion

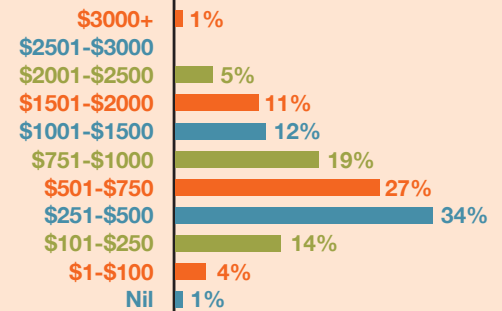
Nga Haeranga New Zealand Cycle Trails were established as part of a government economic initiative to stimulate growth to regions during the recession of 2009. With the results outlined in this report, the West Coast Wilderness Trail is delivering strongly and the trail is quickly taking its place as one of the leading rides in the country.

West Coast Wilderness Trail Insights Summary 2017

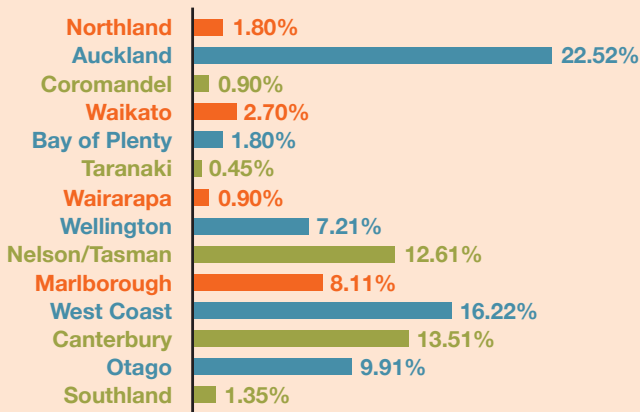


Reason for visit
Cycling
Other

Total Expenditure

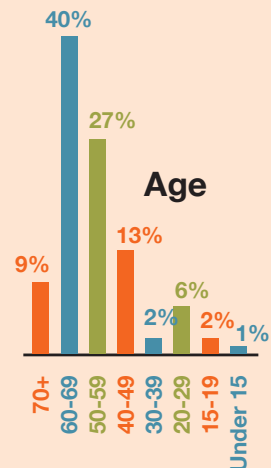
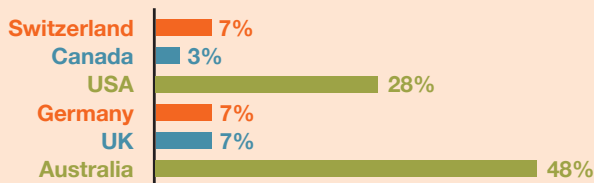


Origin - Domestic



Origin of Riders
Domestic
International

Origin - International



Age

Additional Visitors

up to
10,000pa

Length of Stay

on trail | on Coast
3.2 | 4.3

Spend per Rider

per day | on trail
\$207 | \$663

New Businesses

at least
5

Direct Economic Benefit

up to
\$6 million

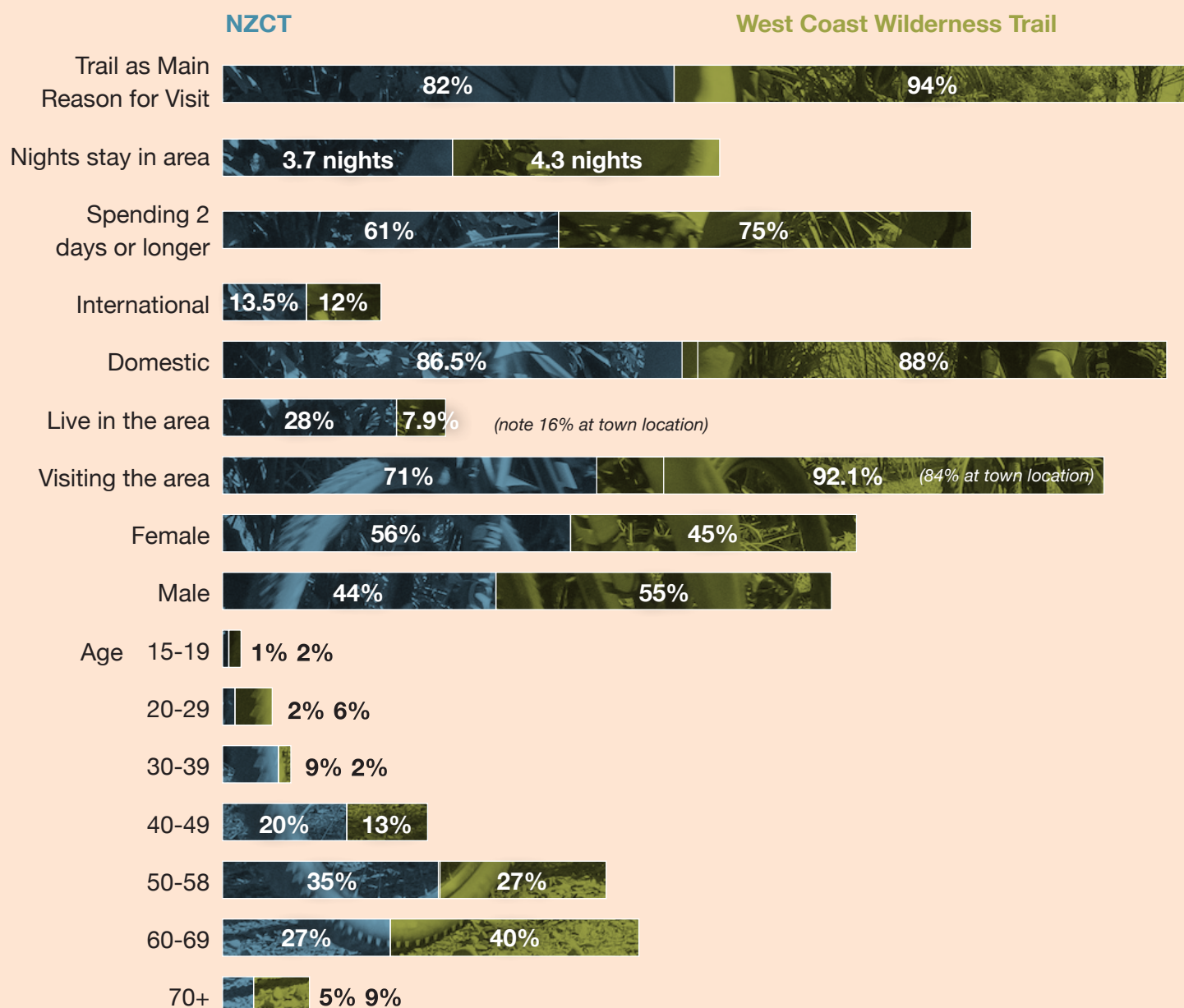
Direct Business Investment

to date
\$7 million +

Direct Employment

30+ JOBS

Comparisons - New Zealand Cycle Trails v West Coast Wilderness Trail



Section 1 Introduction

1.1 Background – The West Coast Wilderness Trail

The catalyst for the Wilderness Trail came from a Government economic summit following three consecutive periods of negative growth, formally known as a recession, in 2009. The trail will have cost \$8.8 million to build being funded from the Ministry of Business, Innovation and Employment, Development West Coast, the Grey and Westland District Councils and the Department of Conservation. Officially opened on 23 November 2013 the trail is easily ridden in its entirety. The final completion work was scheduled for late October 2017 however the exact date is unknown and depends on funding.

1.2 Economic Assessment and Benchmarking Indications

With almost five years of operation of the trail, the West Coast Wilderness Trail Trust aims to set in place a process to measure the success and economic impact of the trail. This report has been prepared as an initial benchmark and point from which to establish a method to measure the growth and benefits of the trail to-date and going forward.

The overall measurement considers five types of analysis as follows:

1. Trail Counter Data
2. Quantitative analysis from members of the Official Partners Programme
3. Qualitative Analysis – Stories from the early business entrepreneurs
4. Survey data recorded annually from riders on the trail
5. Economic measurement based on the number of riders, spend and length of stay

Section 2 Performance Benchmarking

2.1 Trail Counter Data

Counters have been established at a number of points on the trail. Like other trails, the accuracy of the readings is in question. MBIE is funding two of a new type of recorder for all trails. The initial information has been recorded in this report and provides a guide or indicator only. As the new system of recording is installed this data will become much more reliable. The table below outlines the recordings that have been made in four locations over the last two years. Readings that have been considered significantly inaccurate have been excluded and a monthly and annual average calculated. This derived figure of 7,200 total riders has been used in the economic impact calculations within this report. The true number is thought to be somewhere between this and 10,000.

2.2 Trail Counter Results

LOCATION	AVERAGE	x12 (yearly)
Lake Kaniere	733	8796
Ross	670	8040
Taramakau	467	5604
Kaniere Water Race	522	6264
Average	598	7176

Quantitative analysis from Official Partner Programme Members

The quantitative analysis being put in place measures:

- the numbers of riders
- numbers booked with tour companies number of hire bikes available
- % growth of bike hires
- % growth in accommodation bookings % growth with attraction users
- growth in new and existing businesses
- business investment
- increased employment.

A current limitation of this analysis is that accommodation operators report it is not always possible to identify if the visitors are riding the trail or not. The work

involved in preparing this report has encouraged a number of businesses to put in place various measures for the trail. As examples, an additional key has been included at point of sale and visitors are now questioned on arrival to determine if the reason for their visit is specifically to ride the trail.

A further limitation is that the measurement only comes from Official Partners Programme members. There are a large number of other operators, particularly accommodation providers, who host riders that are not recorded within this analysis.

This year can be considered the foundation year for establishing indicators. Below are the figures provided for the past season from the operators that have recorded them. Going forward operator statistics, particularly from accommodation providers, are being collected and will be provided in future years. Due to the confidential nature of the information these statistics will be shown collectively or as percentage growth.

Benchmark Indicators

MAIN BOOKING SERVICES	% Growth	Per Person	%
West Coast Travel Centre			
2015/16 - 2016/17 Individuals Booked	82%		
2015/16 - 2016/17 Average Spend	82%		
2015/16 Average Spend		\$344	
2016/17 Average Spend		\$627	
2015/16 - 2016/17 Accommodation	203%		
2015/16 - 2016/17 Cycle Hire	827%		
2015/16 - 2016/17 Shuttle	87%		
% Accommodation Spend in Westland			76%
% Accommodation Spend in Grey			24%
Tour Companies	Companies	Riders/Year	Trips/Year
2016/17	7	284	25 trips
Bike Hire	Companies	Bikes Available	ebikes
2015/16	4	82	
2016/17	4	103	3
Shuttles	% Rider Growth	% Turnover Growth	
Wilderness Trail Shuttle	34%	40%	
Accommodation - % Growth figures will be included in future years			

Business Growth

The trail has been a catalyst for at least five new businesses and the expansion of several others. The table below provides an overview of this growth.

BUSINESS GROWTH	Location	Facilities	Staff
Theatre Royal Hotel	Kumara	Complete rebuild of hotel facing demolition. Bar, meeting room, inside and outside dining, 6 luxury rooms	15-20 FTE and PTE
Six Miners Cottages	Kumara	Elegant self contained, sleeps 4	
Associated buildings restored include:			
Bank of New Zealand building	Kumara	2 luxury suites	
McEnaney's Cottage	Kumara	4 bedroom holiday home	
Burridge's Cottage	Kumara	2 bedroom accommodation	
Kumara Route 73 Café and Motel	Kumara	Café redevelopment underway	2 Owners
Greenstone Retreat	Kumara	Restored 3 bedroom villa. 4 bed dorms and a campervan/tent sites	1 Owner
Jet Boat Tours – Attraction pending			TBC
Cowboy Paradise	Cowboy Paradise	Saloon, Kitchen, Accommodation	Owner and 2 staff
West Coast Scenic Waterways	Mahinapua	Scenic Cruise Attraction and Kayak Hire. 4 B&B Units	2 Owners and 1 PTE pending
Totara Bridge Station	Ross	12 Units. 25 Powered and unpowered sites. Coffee lounge/café pending	2 Owners and 1 PTE pending
Wilderness Trail Shuttle	Hokitika	3 vans, 3 trailers, depot	Owner and 2 PTE
Trail Transport	Greymouth	1 van and trailer	Additional Business Function
Colls Cycles and Sports - Pending	Greymouth	Van and trailer	TBC
Cycle Journeys	Hokitika	70 bikes (including 10 ebikes) Depot	2PTE
Bike Hire	Greymouth and Hokitika	173 hire bikes across 5 businesses	Additional Business Function

2.3 Qualitative Analysis – Stories from the Early Business Entrepreneurs

Qualitative analysis is proposed to measure the trail from the picture painted of the commercial investment in the trail by some of the first new businesses to be developed on the back of the trail. A number of these early business investors share the reasons behind their decisions and the vision they hold for the trail.

Revitalisation of Kumara - Theatre Royal Hotel Restoration



The township of Kumara has been revitalised by the trail. Just a few years ago the town's future was in question and there were no obvious growth opportunities emerging. Becoming a destination on the cycle trail has turned the fortunes of the town around with the restoration of the award winning Theatre Royal Hotel the cornerstone of the transformation.

Built in 1876, at the beginning of the Kumara gold rush, the Hotel was the meeting, entertaining and playing place for miners who had arrived in Kumara from around the world. How the wheel comes back around (pardon the pun) for a new era of people seeking fun and recreation away from the workplace.

When current owners Kerrie and Mark Fitzgibbon purchased the hotel in 2010 it was derelict, vandalised and in total disrepair. After two years local tradesmen have restored and rebuilt the historic hotel complete with bar, meeting room, inside and outside dining and six outstandingly presented rooms.

“We realised early on that to support the cycle trail operators we required more diverse accommodation to be added for groups” Kerrie reported.

The couple went on to restore the Bank of New Zealand building into two luxurious suites, McEnaney's Cottage, which has four individual rooms all containing ensuites plus full self-catering and the Burridge's Cottage into two bedroom accommodation.

In 2016, six newly built self-contained Miners' Cottages were opened at the rear of the hotel to help cater for the demand created predominantly from the Wilderness Trail.

“By the 2017/18 season we will have a total of 34 rooms available and employ up to 20 full and part-time staff.”

Presented with the HANZ Award for Excellence as the Best New/Redeveloped Accommodation Hotel in New Zealand in 2013 the hotel received the Excellence Awards for New Zealand's Best Country Hotel in both 2014 and 2015.

“We just feel so incredibly positive about the way the trail is progressing. It is so new and it's only getting better and better. The numbers are growing and more of our clients are bringing friends back. Forward bookings for the coming season are very positive. The other exciting thing about the trail is how many people benefit. These riders are in the environment to spend money and everyone benefits. They are also such a great group, they are fabulous to host.”



Trail Shuttle Services Launched – Wilderness Trail Shuttle



After a 35 year sojourn Chris Steel decided it was time to return to his roots and in 2011 made Hokitika his new home along with partner Birte. When Chris arrived in Hokitika he was guiding for Christchurch based Hiking New Zealand at the time and looking for new opportunities. Neighbour Mike Keenan (of Wild Foods Festival fame) had a strong influence on Chris's decision to start a shuttle business on the West Coast Wilderness Trail. "Mike was passionate about the cycle trail and

drove us to all the different places where the trail would go. At the time there was little to see but it wasn't hard to imagine how amazing the trail would be once finished." By the time the trail opened in November 2013 Chris had a van and was in business.

Chris has always played a leading role in the trail's development. He was instrumental in setting up the cycle operators group in the early days of the trail after seeing a disconnect between those spending public money building the trail and those, like him, spending private money. "There was a parallel between the two and a body was needed to realise the vision with the type of services that complemented a world class tourism product." Chris has continued championing the Trail and is now the Chair of the Wilderness Trail Trust, the body that markets and manages the Trail.

Business expansion came for Chris after year three. "I was the chief cook and bottle washer and doing everything when I realised I had reached a point where I couldn't grow any further without making some major decisions. The business plan was in my head but needed to be more structured and the business needed to grow to another level."

Late in 2016 Chris purchased a second van and trailer and began discussions with Geoff Gabites of Cycle Journeys around the possibilities of a joint venture for the 2017-2018 season. "The reality was I just wasn't getting the return on investment with the organic growth I was experiencing and needed to see the van loadings start improving. I had been toying with the idea of purchasing a fleet of hire bikes but lacked the expertise in this area. Cycle Journeys had been operating for 5 years on Alps 2 Ocean and had a big database of clients wanting to ride new trails and the West Coast Wilderness Trail was an obvious choice. Cycle Journeys had the marketing experience, the bike hire expertise and a fully operational booking team based in Christchurch. As part of the joint venture the two companies have established a depot in Hokitika renting out part of the old Renton Hardware building.

In a previous life Chris owned and managed a large veterinary practice in Christchurch. He admits to always having taken a very conservative approach to business investment in the past but his confidence in the trail has seen him prepared to be far more aggressive with his business plans this time around.

"It's been about getting to a level at which I can cope with the demand next season. I want to be ahead of it, not catching up. Tourism is completely dominated by factors out of my control and yet I have this huge confidence in this product we've got. It's just a no brainer."

In the last season Wilderness Trail Shuttle has seen a 34% growth in riders and a 40% increase in profit and Chris sees the trail on a cusp with much more to come.

Environment and History – Ingredients for New Business – West Coast Scenic Waterways



Being asked to give an easement for the West Coast Wilderness Trail was the catalyst for Gavin and Cindy Hopper's West Coast Scenic Waterways experience.

"We wouldn't have purchased the old paddleboat business if it wasn't for the cycleway," Cindy acknowledges.

The West Coast Scenic Waterways and B&B has been set-up as an attraction for the general tourism market but also with the cycle trail as a key market, the trail running adjacent to this new venture. The attraction includes cruising the Mahinapua waterways on the "Eco Adventurer" launch and/or freedom kayaking coupled with four B&B accommodation units.

The Hoppers have invested in the boat, motors, compliance and on infrastructure, undertaking most of the work themselves.

"We've already seen growth move from a small trickle of cyclists to operators forming packages with us and bookings for 2018 already made."

West Coast Scenic Waterways is now in preparation to expand with development of a visitor interactive centre. Aptly named "The Watermen", the Hoppers are planning to build a boatshed replicating those of the 19th century era facing Mt Cook on their land by the cycleway near the Mahinapua Creek. Having already approached DOC, they also have plans for a joint carpark on site which will serve as safe visitor parking for viewing the historic Category 1 Mahinapua Creek railway bridge together with their operation site. Cycleway users will be able to park there and enjoy a day-trip to Treetop Walkways or Ross return.

"We are looking at a whitebait sanctuary breeding site and fishery options as well. Heritage and cycleway information boards would be great as well as flax and timber milling information..it's really exciting actually."

While currently running the business themselves, the couple intend investing further to expand and contract staff initially with the B&B.

Swapping the West Coast of Aus for the West Coast of NZ – Totara Bridge Station



With an open mind and heart Andy and Sue Stile came to NZ, from the UK via Australia, with the desire to achieve a long-held dream of owning and operating a tourism venture. New Zealand was undergoing great tourism growth so the timing was perfect. With the lure of the West Coast ocean and a keen eye on the unusual the couple have found themselves the perfect spot.

The Wilderness Trail was a significant factor in the couple's decision to purchase the 30yr lease on the Totara Bridge Station at Ross. Located at the "head or tail" of the trail the holiday park is just 500m away.

"Our search for an unusual business led us across New Zealand. The flourishing tourism market and affordability of the West Coast interested us greatly. Our property, with the Wilderness Trail at its door, has given us a great opportunity and experiences to share."

Whilst living in Australia for 15yrs, Andy and Sue have gained a wealth of experience from managing and leasing Holiday Parks. Totara Bridge Station has 12 quirky accommodation pods, all made from upcycled shipping containers, together with powered and unpowered sites for caravan, motorhomes and campers. Set in the stunning beachside location the enterprise is set to flourish.

While initially planning to manage the complex themselves additional staff will be employed as the business grows and develops.



Booking Service and Bike Hire Sets Up Depot on the Coast – Cycle Journeys



The first dedicated cycle hire depot is due to open in the 17/18 season as a partnership between Cycle Journeys and Wilderness Trail Shuttle owners Geoff Gabites and Chris Steel.

The enterprise, based in the historic Category 2 former Renton Hardware building, will offer a one-stop shop for bookings, cycle hire, shuttle and accommodation. The fleet of 70 hire bikes, including 10 ebikes, will become the largest in the region. Shuttles from Christchurch are also being offered as current services do not link well with the trail. Gabites is looking forward to maximising the opportunities the trail offers “Our target is 500 riders for this year and we are currently well above sales target.”

Gabites brings 25 years experience in guiding to the Coast. Having formerly owned Adventure South, his entry into cycle trails was with the Central Otago Rail Trail in 2005-06 where he had observed the trail mature from dormitory accommodation, to shared bathrooms then ensuite. He watched it emerge from the baby boomer female riders from Auckland to the Australian market. By 2010 when the Government held the job summit which was the catalyst for the national network of trails, his company had experienced extremely rapid growth and was running weekly departures to and from Christchurch. The business plan was to establish as an outfitter for Alps 2 Ocean when it opened. From the trail opening in 2011-12, the new company, Cycle Journeys reached 2000 clients a year at the end of 2016.

Geoff knows bikes and what it takes to grow a business, including investing in the development of an automated booking system. His vision for the Wilderness Trail is based on the numbers generated from previous trail experiences where he now sees people wanting to bundle a series of trails together or finishing one and looking to book the next.

“The thing that actually gets me excited is that this is the one trail that I think we can sell a winter story on.” He is working with other operators to develop itineraries to other Coast activities such as Punakaiki and the new Pike 29 Trail when it opens. “It’s about recognising the opportunity and providing what the customer wants” according to Gabites.

He also has confidence in the growth of accommodation and services on the trail. “As people see consistency in demand for the trail, accommodation - which is the critical component - will develop. When the locals see this occurring they will commit to investment. The challenge for us all is to identify the opportunity and have confidence in the long term sustainability of the trail. We came in because we have a wider knowledge and experience from other trails to base our decisions on. Its great if people see this and have a similar confidence to follow the example.”

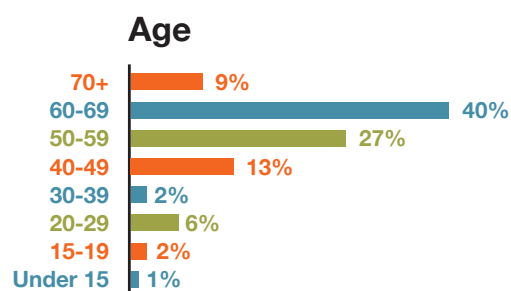
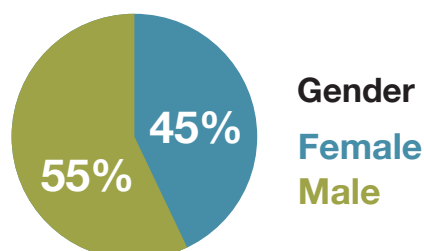


Market Research – The 2017 Wilderness Trail Survey Snapshot

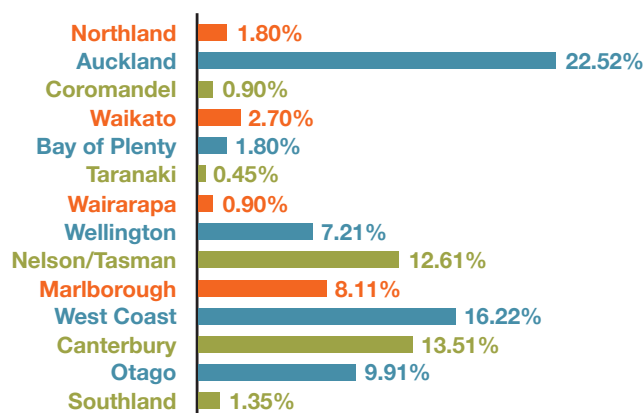
This survey is the first formal market research to be undertaken with West Coast Wilderness Trail riders and was undertaken between February and April 2017. It aimed to determine the demographic profile of riders, what attracted them to ride the trail, how they rode the trail and feedback on their experience. It also provides further insights into the economic benefit of the trail to the West Coast.

The survey results, based on a written questionnaire with 254 cyclists, presents a clear picture of the trail having created a new destination attraction for the Grey and Westland districts into an ideal market. Riders are predominantly from an older demographic of visitors coming to the West Coast specifically to ride the trail, many in groups, with most staying around 4 days. The key findings are outlined below. The full report is available on www.westcoastwildernesstrail.co.nz

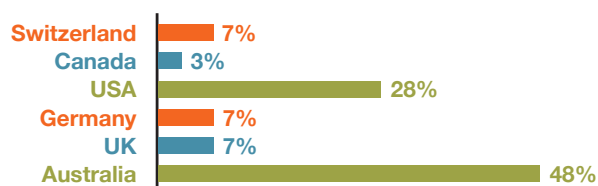
1. Rider Profile



Origin - Domestic



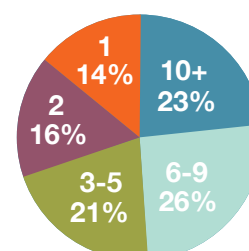
Origin - International



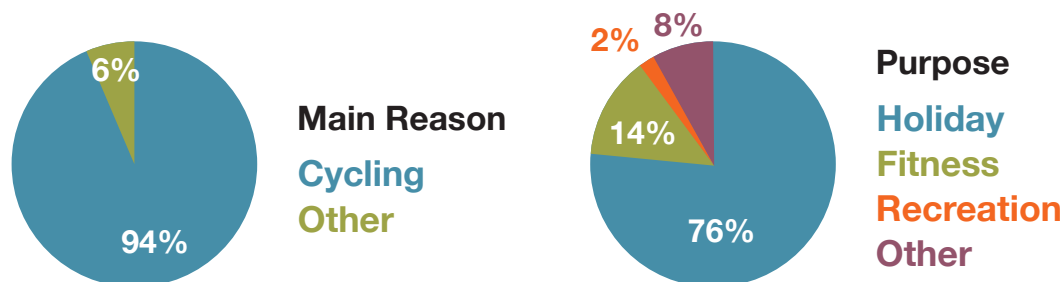
Makeup of Group



Size of Group



2. Choosing the Wilderness Trail



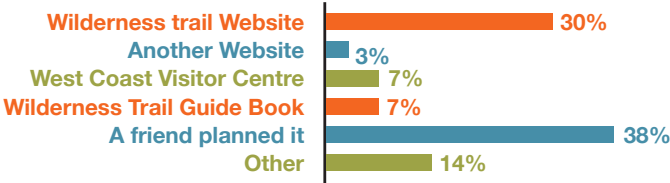
Attraction of the trail



3. Planning the Visit

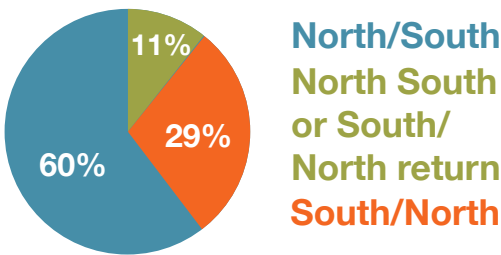


Planning the trip

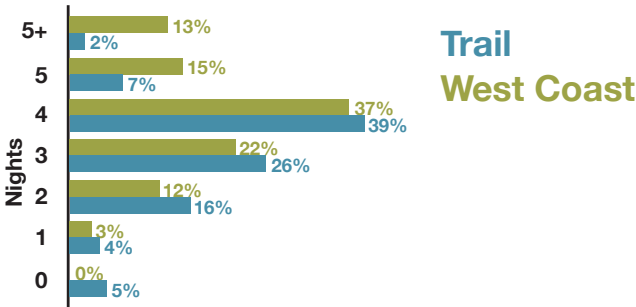


4. Riding the Trail

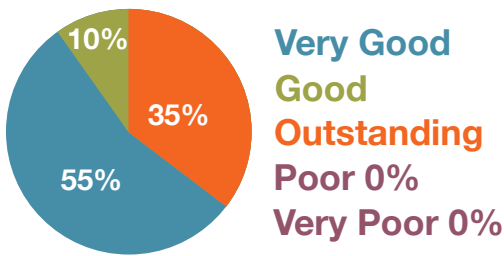
Direction of travel



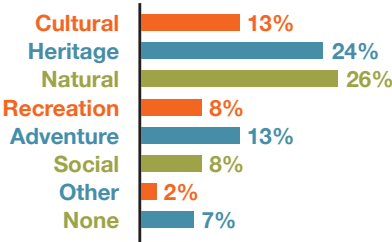
Length of Stay



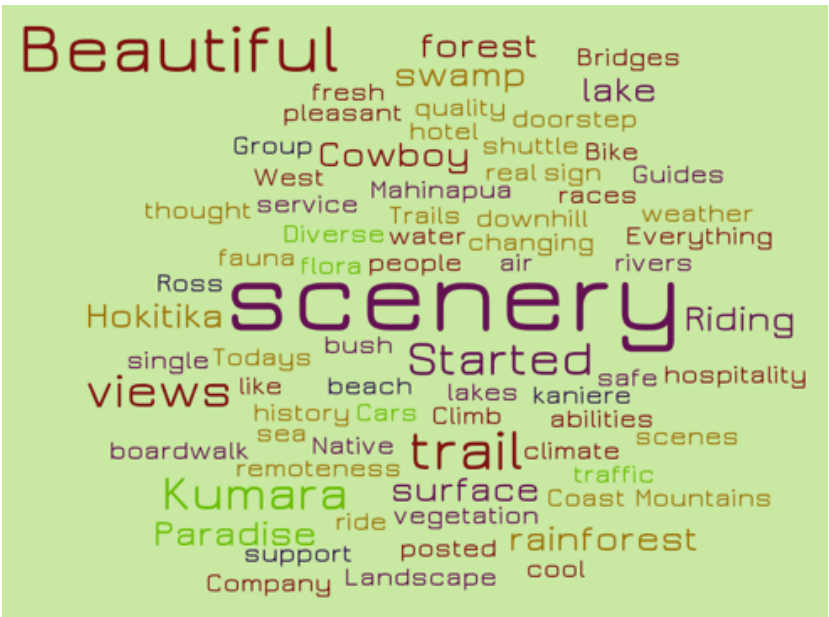
Satisfaction



Other Potential Activities



Most Enjoyable Feature of the trail

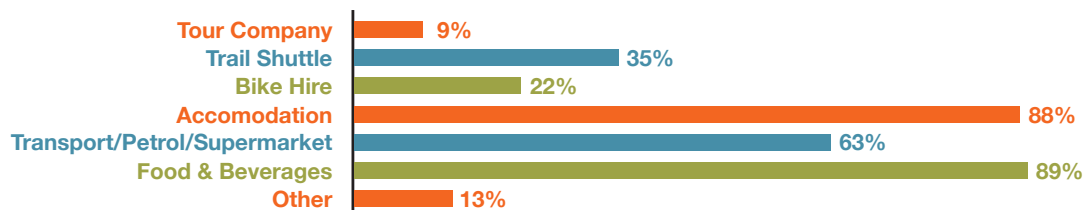


Other Activities undertaken while on the trail

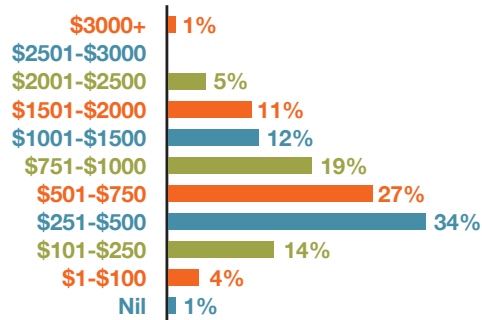


5. Expenditure

Products and Services Purchased



Total Expenditure



ITEM	Percentage of Riders Purchasing Products	Average Spend per Rider \$
Transport	63%	\$77
Accommodation	88%	\$282
Bike Hire	22%	\$43
Shuttle	32%	\$63
Food	89%	\$182
Other	14%	\$16

2.5 Economic Impact

The initial survey results indicate a spend of \$663 per rider per visit or \$207 per rider per day while on the trail. Data from cycle counters in Westland indicates about 7200 cyclists use the trail per year. Assuming the 7.9% figure calculated for the total in the non-urban areas indications are that the number of visiting riders per annum is around 6,631 per year. Accurate data is not yet considered to be coming from the counters and the true figure could be as high as 10,000 (9,000 visitors). Based on the average spend of \$207 per rider per day while on the trail this generates the following range of direct economic return to the West Coast:

- 6,631 and 9,000 additional visitors
- 21,819 and 38,340 additional day visits
- \$4.4 - \$7.9 million per annum to the regional economy

Section 3 Conclusion

The West Coast Wilderness Trail has established itself within the leading New Zealand trails in terms of popularity. Rather than simply providing an additional attraction for existing visitors to the local region, as is the case with some trails, it is already bringing around 7,000 new visitors, many of whom have discretionary spending and stay for several days. As the trail is growing, new businesses are developing.

The survey work and benchmarking created by the Trust is proving a valuable tool through which to quantify the impact the trail is having. Going forward this will enable valuable analysis for business planning, trail investment and to show the returns to those entities that held the initial vision to build and the growing number of entities that continue to support the trail.

