

A photograph of two cyclists riding on a gravel path through a wooded area with autumn foliage. The image is overlaid with a semi-transparent dark blue filter. The text is centered over the image.

2025 EVALUATION OF NGĀ HAERENGA GREAT RIDES OF NEW ZEALAND

14 NOVEMBER 2025

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Ngā Haerenga New Zealand Cycle Trail Inc. would like to acknowledge this contribution and thank Cycle Journeys for its support, without which the 2025 Evaluation may not have been possible.

Janet Purdey
Chief Executive, Ngā Haerenga New Zealand Cycle Trail Inc.

INTRODUCTION

This report presents the findings of the 2025 Evaluation of the Great Rides which, along with the Heartland and Connector Rides, make up Ngā Haerenga - the New Zealand Cycle Trail. It follows an earlier Evaluation undertaken in 2021 and details how the 23 Great Rides that make up Ngā Haerenga are impacting trail users, the communities in which the trails are located, and Aotearoa New Zealand as a whole.

Relating to activity in the **year ending June 2025**, the 2025 Evaluation provides a **new post-COVID baseline**. The 2021 Evaluation encompassed the year ending June 2021, during which New Zealand's border was closed to most international visitors (other than during brief managed isolation and quarantine-free 'travel bubbles' with the Cook Islands and Australia in the later part of that year).

As in 2021, the 2025 Evaluation considers impacts across a range of domains: **economic**, **social** and **environmental**. However, this year's Evaluation also set out to understand more about trail users: who they are, how they engage with the Great Rides, and the quality of their experience.

Data for the 2025 Evaluation was drawn from a range of sources, as outlined in the Appendices on pages 45-46. Information on survey methodology may also be found on page 45.

Note for readers: while the trail user survey provides valuable insights on trail users and trail use, results scaled to the overall Great Rides pedestrian/cyclist population using counter data should be interpreted with some caution. Although the trail user sample size is substantial and considerable effort is made to ensure that the sample includes the full range of trail users, the extent to which it is fully representative is unknown. Frequent or local users may be under-represented in the sample, and other groups over-represented (for example, cyclists relative to pedestrians).

Following a summary of key insights, this Evaluation report is presented in five sections. The first section quantifies use of the Great Rides in the year to June 2025, using trail counter data. The second section describes trail user activity and the trail user experience and draws in large part on trail user survey data. The remaining three sections each present findings relating to one of the three impact domains: economic, social or environmental.

Where relevant, Evaluation data has been broken down by key user groups for additional insight:

- by **origin of trail user**: local resident, domestic visitor, international visitor.
- by **mode of trail use**: pedestrians vs cyclists and, within the cyclist group, by primary cycle types (mountain bike, standard bike, e-bike).

Changes since 2021 have also been noted throughout the report where relevant.



EXECUTIVE SUMMARY

This report presents the findings of the 2025 evaluation undertaken to assess how the 23 Great Rides that make up Ngā Haerenga, the New Zealand Cycle Trail, are impacting trail users, the communities in which the trails are located, and Aotearoa New Zealand as a whole. The current evaluation follows an earlier assessment in 2021.

The latest findings reinforce the importance of the trails and the breadth and scale of their impact:

- **As an economic driver:** the Great Rides play a significant role in boosting the local and national economies.
- **Social wellbeing:** the trails contribute to the social wellbeing of trail users and the communities in which they are situated.
- **Environmental contribution:** the Great Rides help advance New Zealand's environmental goals, providing access for conservation work, supporting active transport, boosting understanding and an appreciation for the natural environment, and providing green spaces for recreation.

Compared with the year ending June 2021, the latest year saw a substantial increase in Great Ride trail users (growing +18% overall, and by +14% for **cycling** trail users). This growth was driven primarily by an increase in international visitors, but also reflected growth in the domestic market.

Growth in international visitor use was expected since New Zealand's international border was closed for much of the year ending June 2021. However, continued growth in domestic use may be more surprising given that during COVID local demand was stimulated by the border closure and general domestic tourism activity has been fairly subdued in the latest year.

Growth in trail use has translated into a significant rise both in visitor nights and spending linked to the Great Rides, with the latter seeing especially strong gains. On a per-visitor basis, spend has risen from around \$892 in 2021 to more than \$960 in 2025.

When scaled using trail counter data, total expenditure attributable to the Great Rides has surged from an estimated \$950 million in 2021 to more than \$1.25 billion in 2025 – underscoring the economic value of the network.

Included in this economic contribution is an estimated \$357 million in expenditure by international visitors who, while representing just 13% of all trail users and 17% of those visiting the trail regions, accounted for an estimated 28% of visitor expenditure attributable to the trails. This is owing both to their longer average length of stay in the regions, and their higher average expenditure per person - more than twice that of a domestic visitor.

New questions added to this year's trail user survey reveal high levels of repeat visitation and multi-trail use (within the same trip). Indicative of deep and growing engagement with the Great Rides brand and experience, this is further validated by the exceptionally high user satisfaction ratings and a Net Promoter Score of +79 – a world-class result by any standard.

Stakeholder feedback highlights the overwhelmingly positive influence of the Great Rides on local communities – not only boosting regional economies, but strengthening social wellbeing and supporting positive environmental outcomes. A strong sense of ownership is also evident in communities' ongoing investment in the trails' sustainability – from direct funding through TLAs and grants from community trusts, to volunteer contributions and grassroots advocacy by individuals.

Taken together, the 2025 results show that the Great Rides continue to deliver on multiple fronts. In this respect, they remain a compelling example of sustainable tourism in action, successfully aligning economic growth with social and environmental goals.

Impact Snapshot – YE June 2025

Trail usage

2,577,304
total trips for the year ending
June 2025

5.8
trails used *across*
12.2
separate trips/occasions
in the 12 months prior

73%
rated their trail experience
9 or 10 (out of 10)



Cyclists Pedestrians
1,245,299 **1,332,006**



1.3
trails used *on same trip*
(on average)



+79
Net Promoter Score

Economic Impacts



3.9
average party size



1,333,755
estimate of visitors
attributable to the
Great Rides



2,920
estimate of
businesses providing
facilities & services
for trail users



3.4
average nights
per visitor



4,534,767
estimate of visitor
nights attributable to
the Great Rides



546
official cycle trail
partners



\$964.10
average expenditure
per visitor



\$1.28 billion
estimate of expenditure
attributable to the
Great Rides

Domestic visitors
\$927m (72% of total)
International visitors
\$357m (28% of total)

Social Impacts



798,964
estimate of trips taken by
local residents



\$622,825
total value of volunteer
contribution



85%
of trail stakeholders agree that
their local Great Ride is a source
of pride for the local community

87%
of trail stakeholders agree that
their local Great Ride is valued
by the community



\$696 million
value of health benefit resulting
from trail use by NZers

57%
of trail users say their mental
health has improved as a
result of their experience

57%
of trail users say their physical
fitness has improved as a
result of their experience

Environmental Impacts



397,530
native trees/bush planted by
trail managers (total to date)



48%
of trail users report that they
have a greater appreciation of
the natural environment as a
result of their experience



2,671
traps laid for pests
(total to date)



118km
waterways fenced by trail
managers (total to date)



30%
of trail users report that they
have a greater appreciation of
the local culture and heritage as
a result of their experience

SUMMARY OF KEY EVALUATION FINDINGS

The tables below and overleaf summarise key evaluation findings for the year ending June 2025 and compare results with 2021, where available.

		YE June 2021	YE June 2025	Change
Trail Usage	Trips taken by cyclists	1,087,748	1,245,299	+157,551
	Trips taken by pedestrians	1,098,913	1,332,006	+233,093
	All trips	2,186,662	2,577,304	+390,642
Trail User Experience	Trail user satisfaction (% of trail users rating their experience 9 or 10 on a 10-point satisfaction scale)	74%	73%	-1%
	Net Promoter Score	+76	+79	+3
Economic Impacts	Number of visitors to the Great Ride areas attributable to the trails	1,064,904	1,333,755	+268,851
	Number of visitor nights in the Great Ride areas attributable to the trails	3,620,675	4,534,767	+941,092
	Visitor expenditure in the Great Ride areas attributable to the trails	\$950 million	\$1.28 billion	+\$335 million
	Trail Manager count of businesses providing facilities and services for Great Rides users	1,591	2,920	+1,329
	Official Cycle Trail partners	795	546	-249
Social Impacts	Trips taken by local residents of Great Ride areas	785,012	798,964	+13,952
	Trips taken by New Zealand residents (i.e. local residents and domestic visitors to the area)	2,153,862	2,268,028	+114,166
	Trips taken by international visitors	32,800	309,276	+276,476
	Number of volunteers (last 12 months)	808	565	-243
	Number of volunteer hours (last 12 months)	17,069	17,795	+726
	Value of volunteer contribution (calculated at average hourly wage)	\$593,318	\$622,825	+\$29,507

SUMMARY OF KEY EVALUATION FINDINGS (CONT.)

	YE June 2021	YE June 2025	Change	
Social Impacts (cont.)	Proportion of trail stakeholders reporting that they agree/agree strongly that their local Great Ride:			
	... has increased the profile of the area	91%	90%	-1%
	... is valued by the local community	88%	87%	-1%
	... is a source of pride for the local community	86%	85%	-1%
	... is creating greater understanding of the area’s natural environment	83%	81%	-2%
	... has become part of the community’s identity	82%	85%	+3%
	... is accessible to a wide range of people regardless of skill/physical (dis)ability	81%	77%	-4%
	... is making the area a more vibrant or appealing place to live	81%	82%	+1%
	... has been a catalyst for investment in the area	78%	70%	-8%
	... is improving overall quality of life in the area	76%	79%	+3%
	... has been a catalyst for community development	73%	71%	-2%
	... is creating a greater understanding of the area’s cultural heritage	58%	63%	+5%
	Calculated value of health benefit resulting from trail use	N/A	\$696 million	N/A
	Proportion of trail users reporting the following as a result of their Great Ride experience:			
	... my sense of wellbeing or mental health has improved	56%	57%	+1%
	... my physical health has improved	47%	57%	+10%
	... I have developed a closer relationship with the people I was with	44%	33%	-11%
	... I have developed or improved my skills	34%	30%	-4%
	Proportion of Local Government and Business Group stakeholders reporting that their local Great Ride is an important factor in...			
	... attracting visitors to the area (FY 2021)	91%	N/A	N/A
	... attracting domestic visitors to the area (FY 2025)	N/A	91%	N/A
	... attracting international visitors to the area (FY 2025)	N/A	63%	N/A
	... attracting people to live in the area	47%	55%	+8%
	... attracting people to study in the area	8%	21%	+13%
	... attracting people to do business or invest in the area	62%	64%	+2%

SUMMARY OF KEY EVALUATION FINDINGS (CONT.)

	YE June 2021	YE June 2025	Change	
Environmental Impacts	Native trees/shrubs planted (total to date)	NA	397,530	-
	Native flaxes/rushes planted (total to date)	NA	47,200	-
	Kilometres of waterway fenced (total to date)	NA	118	-
	Traps laid for pests (total to date)	NA	2,671	-
	Proportion of trail users reporting the following as a result of their Great Ride experience:			
	... I understand more about the natural environment	26%	21%	-5%
	... I appreciate the natural environment more	51%	48%	-3%
	... I am more conscious of my impact on the environment	22%	18%	-4%
	... I understand more about the local culture and heritage	35%	29%	-6%
	... I appreciate the local culture and heritage more	29%	30%	+1%

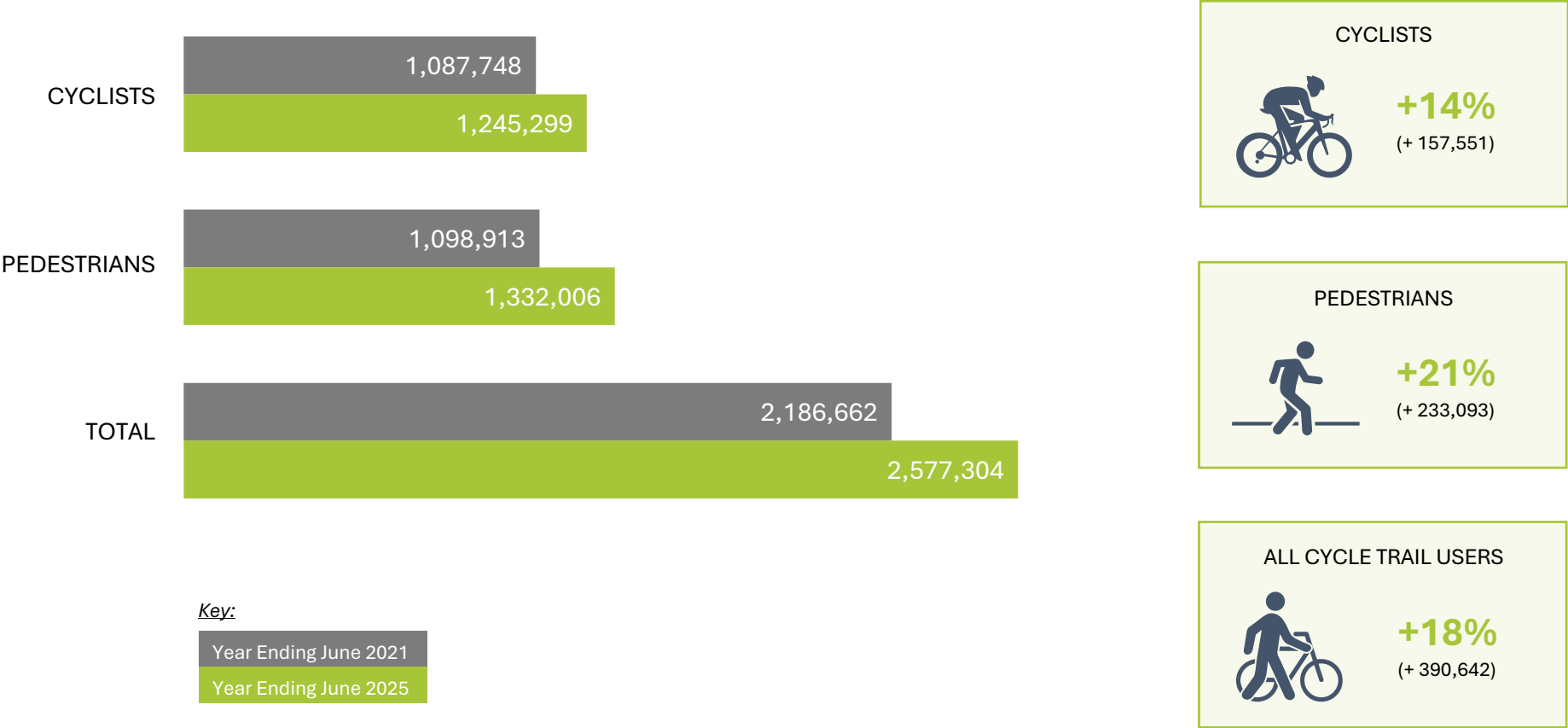
TRAIL USAGE



TRAIL USAGE

In the year ending June 2025, almost 2.58 million trips were taken across the Great Rides network.¹ These trips were divided more or less equally between cyclists (48% of trips) and pedestrians (52%).

Relative to the year ending June 2021, the 2025 data represents growth of +14 percent in the number of trips taken by cyclists and +21 percent in trips taken by pedestrians – an increase of +18 percent in usage occasions (trips) overall.

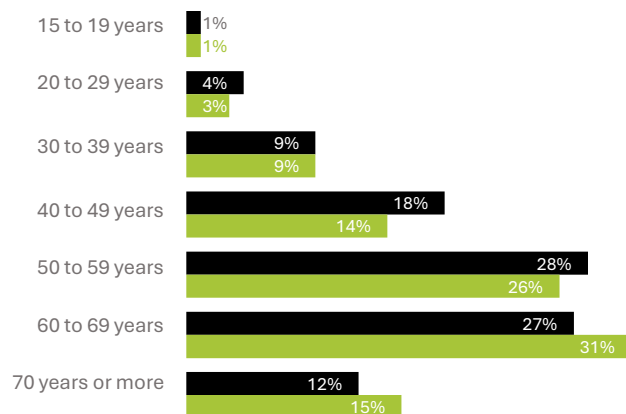


¹Source: Trail Counter data. Refer to the Appendices (page 47) for individual trail counts.

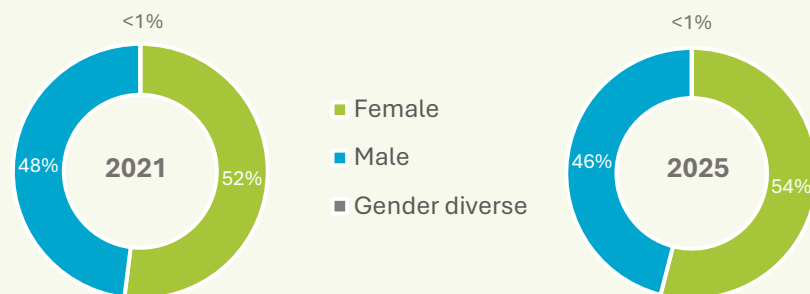
TRAIL USER PROFILES

The latest year's survey results show a significant increase in older trail users, and residents of countries other than New Zealand (Australia being the primary source market). While international markets contribute 13% of trail users overall, **this proportion ranges from 2% to 47% across the individual Great Rides**. There has also been a substantial increase in the use of e-bikes since 2021. Refer to the following page for more information on trail use by market of origin (local, domestic, international).

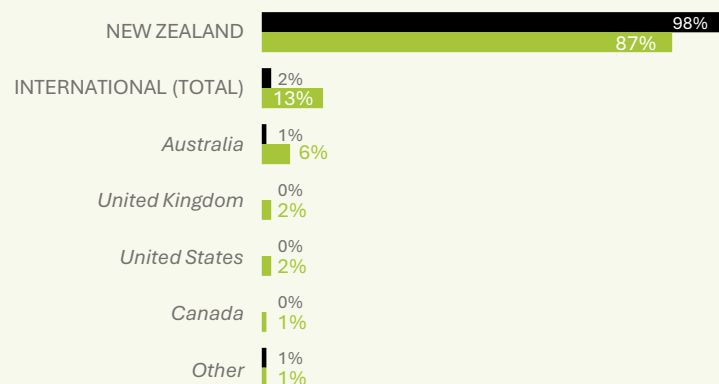
AGE



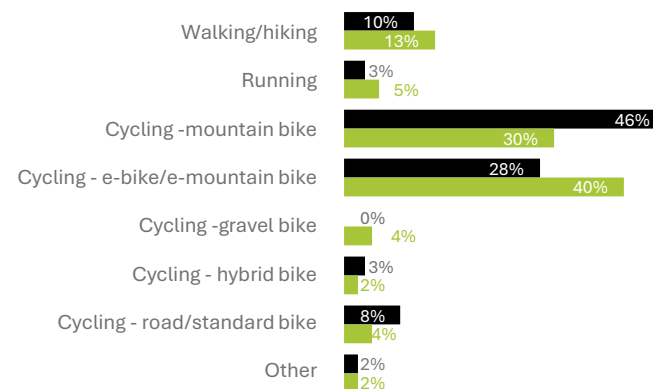
GENDER



COUNTRY OF RESIDENCE



MODE OF USE



Key:

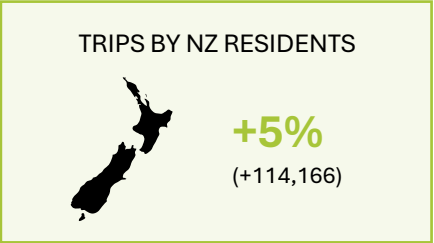
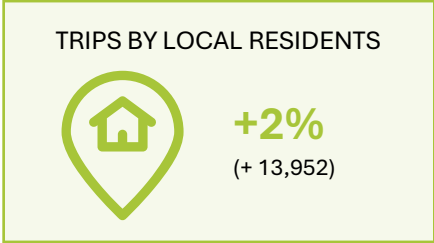
Year Ending June 2021

Year Ending June 2025

TRAIL USE BY ORIGIN OF USER

In the year ending June 2025, survey data scaled to the trail counter data indicates that **local residents** accounted for 31% of all usage occasions (or almost 800,000 individual trips in total). This is an increase of +2% on trips taken by local residents in the year to June 2021.

Visitors to trail regions accounted for the remaining 69% of usage occasions (or almost 1.8 million trips in total). More than 80% of these trips were taken by **domestic** visitors (almost 1.5 million in total), and the remaining 17% (309,276) by **international** visitors. Use of the trails by international visitors has increased dramatically in the four years from YE June 2021 to YE June 2025 (+843%).



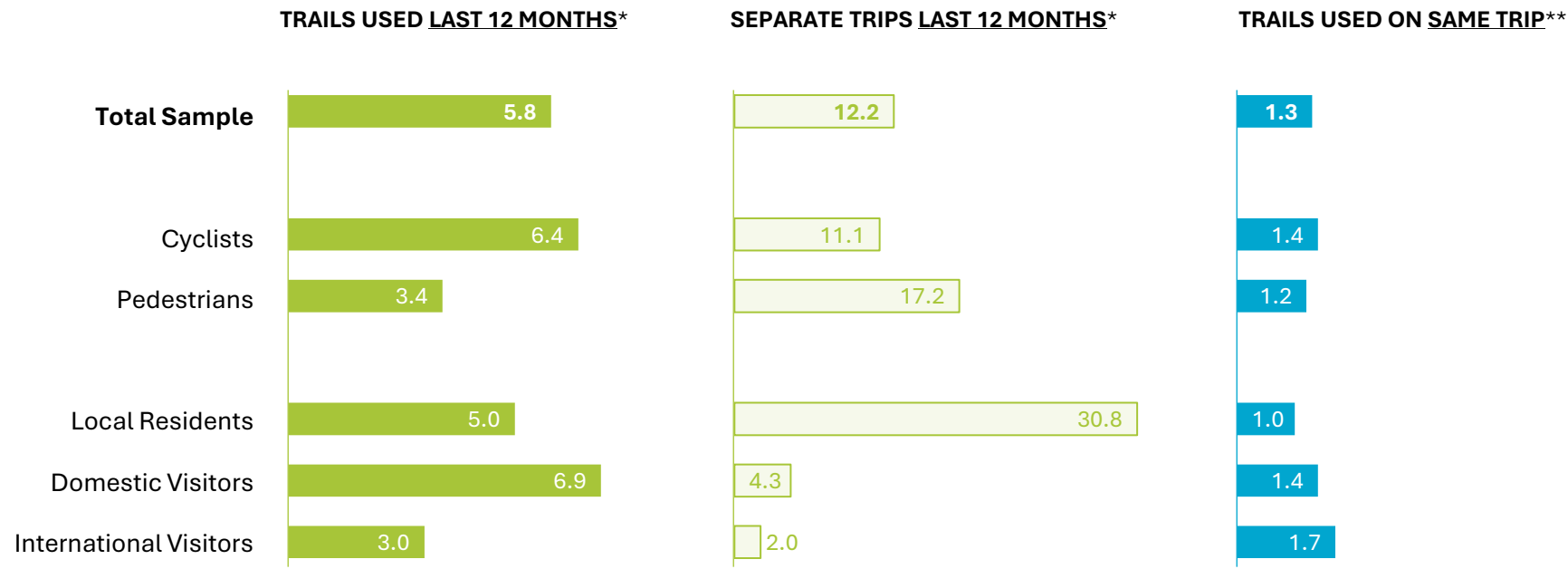
	YE June 2021		YE June 2025	
	%	Trips (n=)	%	Trips (n=)
Local Residents vs. Visitors				
Local residents	36%	785,012	31%	798,964
Visitors (TOTAL)	64%	1,401,650	69%	1,778,340
Base: Total trips (n=)		2,186,662		2,577,304
Origin of Visitors				
Domestic visitors	98.5%	1,368,850	83%	1,469,064
International visitors*	1.5%	32,800	17%	309,276
Base: Total trips by visitors (n=)		1,401,650		1,778,340

REPEAT & MULTI-TRAIL USE

On average, each respondent to the trail user survey in YE June 2025 had experienced 5.8 trails across 12.2 separate trips/occasions in the 12 months prior.

A new question was added to the trail user survey in December 2024, asking about the number of trails used **on a single trip**. For the period from December 2024 to June 2025, 83% of trail users had cycled/walked a single trail on the trip in question and almost **one in five** had experienced multiple trails (an average of 2.9 trails per multi-trail user).

Overall, results highlight a very high level of **multi-trail use** by New Zealanders (residents and domestic visitors to trail communities) and of **repeated trail use** by local residents (an average of 30.8 usage occasions per person in the last 12 months). However, a high level of multi-trail use is also apparent amongst international visitors, with an average of two separate trips and three trails per person in the last 12 months.



* Last 12 Months [YE June 2025]: Total sample (n=7,461), Cyclists (n=6,065), Pedestrians (n=1,383), Local residents (n=2,303), Domestic visitors (n=4,249), International visitors (n=909)
** Same trip [December 2024 – June 2025]: Total sample (n=5,215), Cyclists (n=4,307), Pedestrians (n=901), Local residents (n=1,396), Domestic visitors (n=3,059), International visitors (n=760)

TRAIL USER EXPERIENCE



TIME SPENT ON-TRAIL

Almost half of all trail users spent four hours or less on their trail experience, with the largest group spending 1-4 hours. A little over one-third (35%) of the subject trips in the year ending June 2025 were multi-day experiences (two days or more).

International visitors typically spend the longest time on-trail, with 62% of trips taken by international visitors being multi-day experiences.

	Total Sample	Cyclists	Pedestrians	Local Residents	Domestic Visitors	International Visitors
Less than 1 hour	5%	3%	10%	11%	2%	1%
1-4 hours (half a day)	44%	43%	48%	70%	34%	20%
1 day (more than 4 hours)	17%	18%	10%	12%	19%	17%
2 days	12%	14%	3%	3%	17%	11%
3 days	6%	7%	2%	1%	8%	10%
4 days	7%	7%	8%	1%	8%	16%
5 days	6%	3%	17%	1%	7%	11%
6 days or more	4%	5%	1%	1%	4%	13%
Sample size (n=)	7,475	6,074	1,387	2,313	4,251	911

x% or y% significantly higher or lower when compared with the Total Sample

REASONS FOR USING THE TRAIL

Motivations for trail use vary significantly by user group. Overall, the Great Rides satisfy common needs for exercise, relaxation and social connection, while providing domestic and international visitors with opportunities for sightseeing, experiences of the natural environment and/or local culture and heritage, and the base for a cycling-oriented holiday.

	Total Sample	Cyclists	Pedestrians	Local Residents	Domestic Visitors	International Visitors
For exercise	51%	50%	51%	69%	44%	31%
For relaxation	37%	38%	34%	44%	36%	26%
For a cycling holiday	36%	44%	1%	4%	47%	61%
To spend time/socialise with friends or family	35%	37%	29%	38%	37%	21%
Sightseeing	29%	31%	22%	17%	34%	40%
To escape the pressures of daily life	22%	22%	22%	25%	22%	15%
To experience or learn about the natural environment	17%	17%	17%	11%	18%	25%
To experience or learn about local culture and heritage	11%	12%	9%	5%	14%	16%
Bikepacking	9%	11%	0%	4%	10%	15%
To participate in an event	7%	4%	22%	6%	9%	2%
For a walking holiday	6%	1%	29%	1%	7%	12%
To train for an event	5%	5%	7%	10%	4%	1%
To commute to/from school or work	1%	1%	1%	3%	0%	0%
Other	5%	5%	7%	7%	5%	3%
Sample size (n=)	7,475	6,074	1,387	2,313	4,251	911

USE OF SUPPORTING FACILITIES AND SERVICES

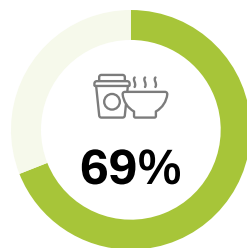
More than two-thirds of all trail users take advantage of local food and beverage services, while half stay in local accommodation. Not surprisingly, use of these services is significantly higher amongst visitors to the trail communities than residents, as is use of bike shuttle/other transport and 'other activities' available on/near the trails. Use of bike hire services is highest amongst international visitors (at 55%), along with the use of guides/guiding services (6%).

Accommodation on/near
the trail



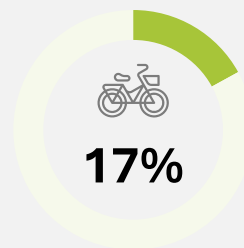
International visitors 81%
Domestic visitors 66%

Food and beverage services
on/near the trail



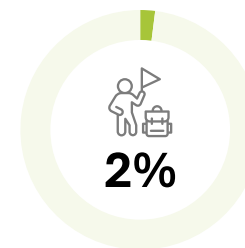
International visitors 81%
Domestic visitors 78%

Bike hire



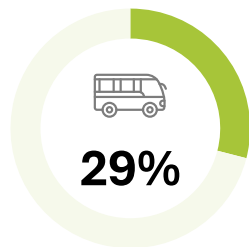
International visitors 55%

Guide



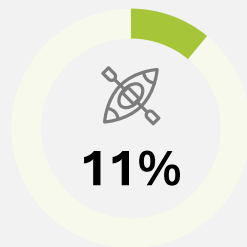
International visitors 6%

Bike shuttle/other transport
to/from the trail



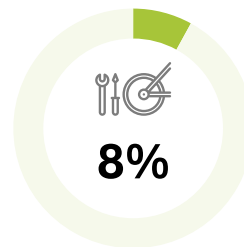
International visitors 54%
Domestic visitors 36%

Other activities on/near
the trail

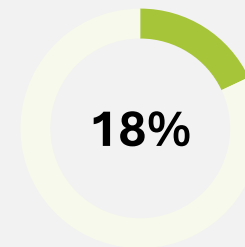


International visitors 21%,
Domestic visitors 14%

Other facilities or
services



None of these



Local residents 42%
Domestic visitors 8%
International visitors 4%

OVERALL SATISFACTION

Users of the Great Rides express very high levels of satisfaction with their trail experience, with almost three in four rating their satisfaction at a 9 or 10 (on the 10-point scale provided). The average score of 9/10 is equivalent to that recorded in 2021.

Overall, the highest satisfaction scores are given by international visitors (53% rating their satisfaction 10/10) and domestic visitors (49%). Amongst other groups, higher than average satisfaction scores are also given by those for whom the trail is the main driver of their trip (52% giving a score of 10/10), those travelling in groups without children (48% vs 42% for those travelling with children), and those identifying as Māori (56%).

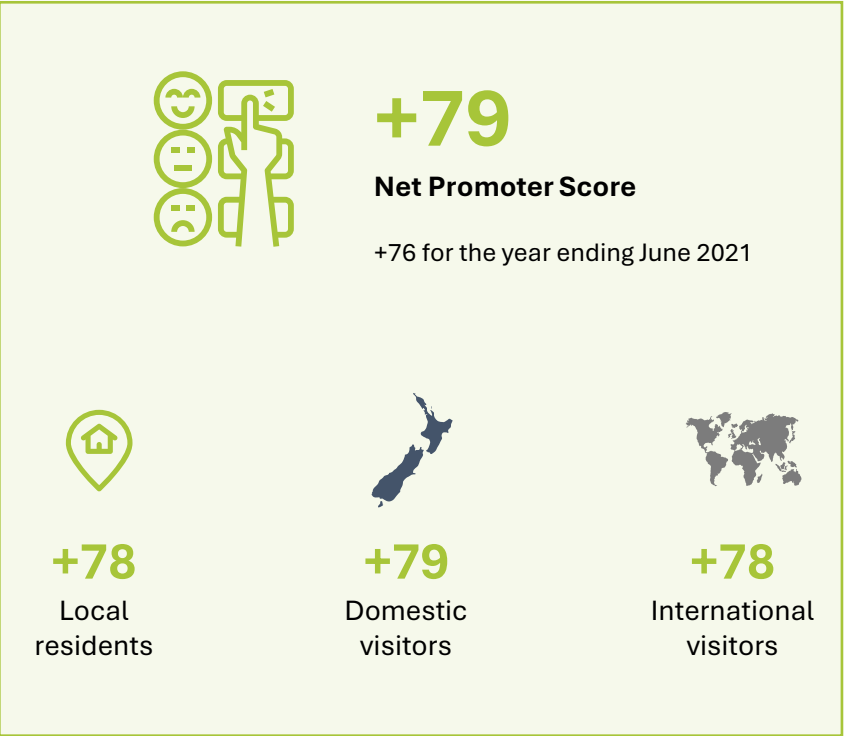


	YE June 2021	YE June 2025
10 (Very Satisfied)	51%	48%
9	23%	25%
8	16%	19%
7	6%	6%
6	2%	1%
5	1%	1%
4	1%	0%
3	0%	0%
2	0%	0%
1 (Very Dissatisfied)	0%	0%
Average	9.0	9.0

NET PROMOTER SCORE

The **Net Promoter Score (NPS)** reflects trail users’ propensity to recommend the Great Rides experience to their friends or colleagues. The NPS for the Great Rides has increased three points from an already outstanding +76 in the year ending June 2021 to an exceptional +79 in the latest year.

The Great Rides NPS is still higher amongst those travelling to the trail communities for the main purpose of walking/cycling a Great Ride (+81), overnight visitors (+82 compared with +78 for day-trippers), and those identifying as Māori (+82).



	YE June 2021	YE June 2025
Promoters (9-10)	80%	82%
Passives (7-8)	16%	15%
Detractors (0-6)	4%	3%
Net Promoter Score	+76	+79

Net Promoter Score (NPS) is an indicator used globally to measure customer engagement and advocacy, based on the likelihood of a customer recommending a given product or service.

Any positive score means there are more loyal advocates willing to recommend the product or service (promoters) than unhappy critics (detractors). A passive customer is satisfied, but unenthusiastic.

A high score of +100 means that every customer is a promoter, while a low score of -100 means that every customer is a detractor.

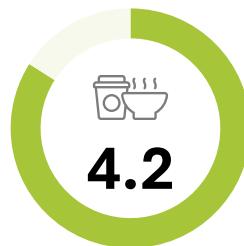
DETAILED RATINGS

In the year to June 2025, users of the Great Rides network expressed very high levels of satisfaction with the facilities and services available to trail users. All facilities/services achieved average ratings of at least 4 (on a 5-point scale, in which 1 equated to 'very poor' and 5 equated to 'very good') amongst those who used them.

Accommodation on/near
the trail



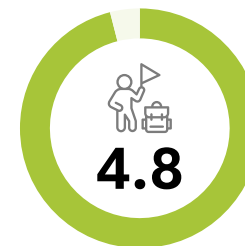
Food and beverage services
on/near the trail



Bike hire
facilities/services



Guiding on the trail



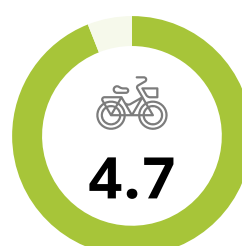
Bike shuttle/other transport
to/from the trail



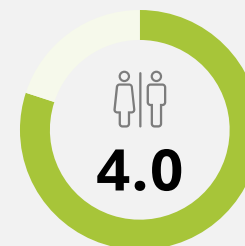
Other activities on/near
the trail



Quality of hire
bikes

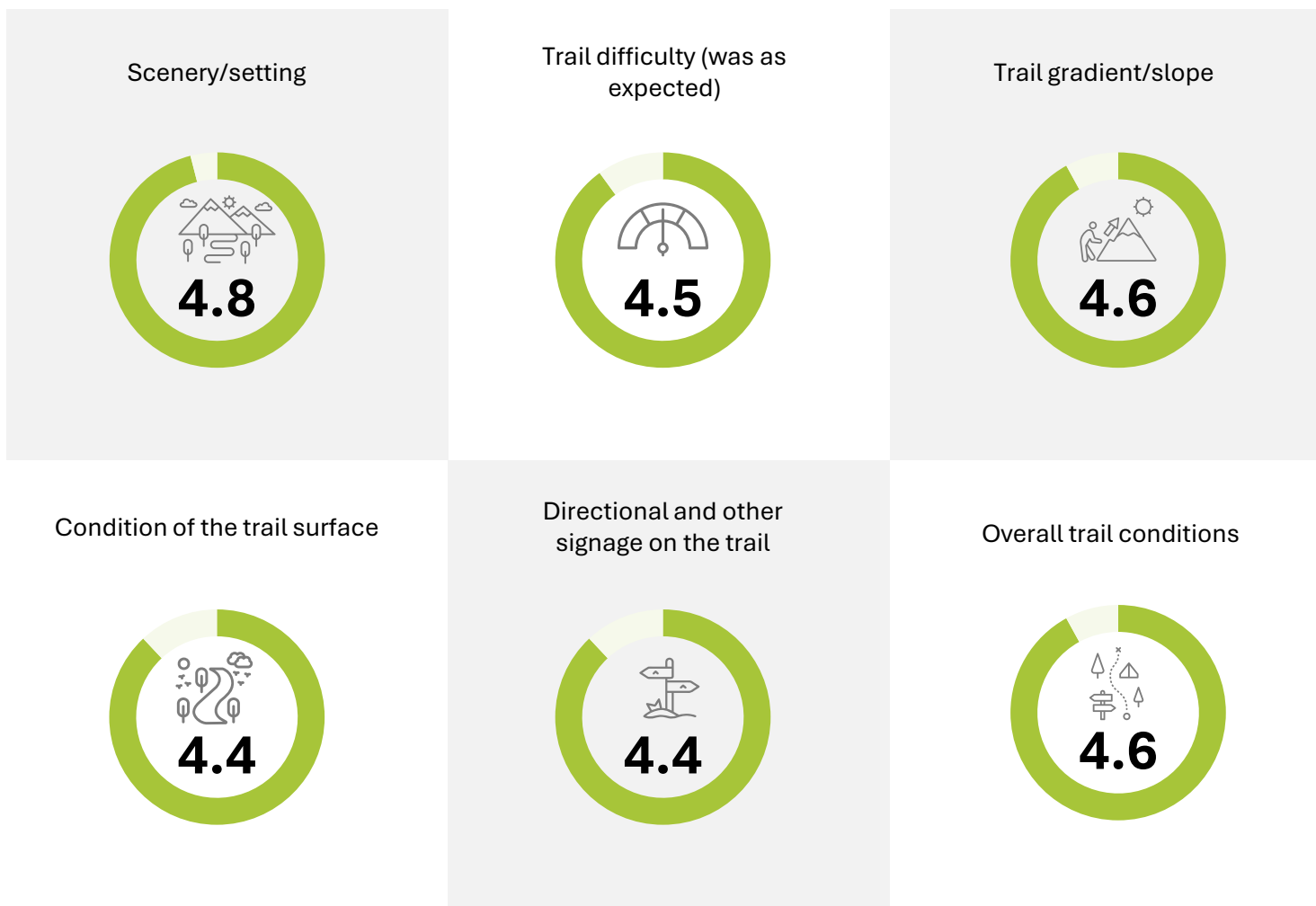


Toilet facilities
along the trail



DETAILED RATINGS (CONT.)

All other aspects of the Great Rides were also rated highly in the year to June 2025, and most especially the trail scenery/setting for the trail user experience. From a user experience perspective, the greatest opportunities for improvement relate to the condition of the trail surface and directional/other signage on the trails.



ECONOMIC IMPACTS



VISITOR NIGHTS

Trail user survey data for the year ending June 2025 indicates that half of all cycle trail users were visiting the area **because of** the Great Ride (and not primarily for some other reason).² If scaled using trail counter data for the year to June 2025, this would equate to more than 1.3 million individual visitors spending a total of 4.5 million visitor nights in the Great Rides regions as a result of their local cycle trail. This is an increase of more than 900,000 nights (or +25 percent growth) on estimates for the year ending June 2021.³

VISITOR ACTIVITY ON THE GREAT RIDES OF NZ



51.8%

Visited the region because of a Great Ride

(48.7% in 2021)



1,333,755

Estimate of total visitors attributable to the Great Rides

(1,064,904 visitors in 2021)



3.4

Average visitor nights

(3.4 visitor nights in 2021)



4,534,767

Estimate of total visitor nights attributable to the Great Rides

(3,620,675 visitor nights in 2021)

TOTAL VISITOR NIGHTS



25% increase

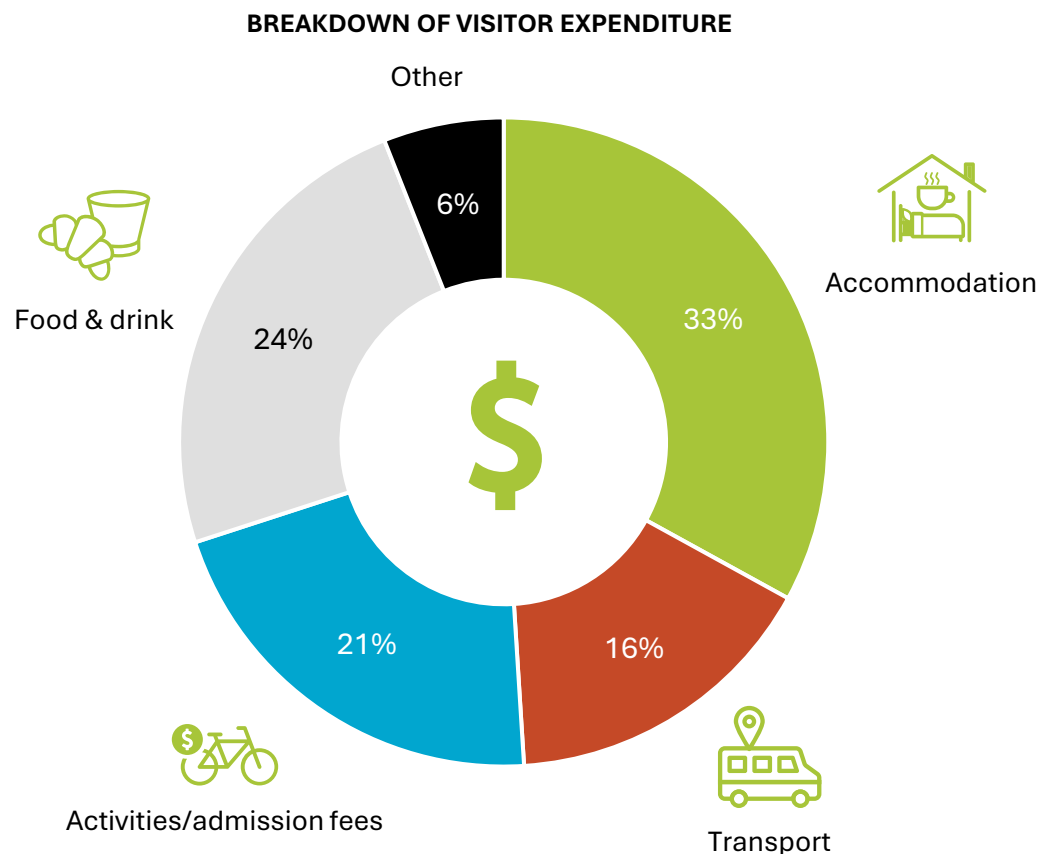
in visitor nights since YE June 2021

(equivalent to +914,092 visitor nights)

VISITOR EXPENDITURE

Using a combination of trail user survey data and counter data, it is estimated that the Great Rides delivered around \$1.28 billion in **new expenditure** to host regions in the year to June 2025 (i.e. expenditure by visitors travelling to the regions for the primary purpose of walking/cycling the Great Rides). This is an increase of +35 percent on estimates for the year ending June 2021.⁴

It is estimated that domestic visitors contributed 72% of this new expenditure and international visitors 28%.



⁴ Calculated by taking the total number of people a) visiting a Great Ride area and b) only/mainly because of the Great Ride (51.8% of trail users or 1,333,755 of the 2,577,304 total count) and multiplying this number by average expenditure reported per person by respondents to the Trail User survey (\$892.20 YE Jun 2021, \$964.10 YE Jun 2025). Sample: visiting the region because of a Great Ride: YE Jun 2021 (n=2,925), YE June 2025 (n=3,854).

VISITOR EXPENDITURE (CONT.)

The Great Rides' economic contribution to their host communities is spread across all sectors of the economy, with accommodation and hospitality businesses, and cycle trail activities/admission fees reaping the largest overall shares of visitor expenditure. Based on the trail user survey data, the average per-trip expenditure per cycle trail user is more than \$960, an increase of +8 percent on per person expenditure in the year ending June 2021.⁵

Note that expenditure is reported only for those cycle trail users who are visiting the areas of the Great Rides for the **primary purpose** of experiencing a Great Ride. This proportion varies by user group, along with other drivers of economic contribution (average length of stay, number in travel party) as shown overleaf.



In-region expenditure	YE June 2021		YE June 2025	
Accommodation	\$243.30	27%	\$317.11	33%
Petrol/fuel	\$33.00	4%	\$62.69	7%
Transport (cycle trail specific)	\$56.30	6%	\$65.33	7%
Other transport	\$17.40	2%	\$30.62	3%
Activities/admission fees (cycle trail specific)	\$277.60	31%	\$171.27	18%
Other activities/admission fees	\$24.90	3%	\$30.61	3%
Snacks/groceries	\$44.90	5%	\$75.90	8%
Cafes, restaurants, eating out	\$113.20	13%	\$152.96	16%
Bars, nightclubs	\$21.60	2%	\$24.13	3%
Other expenditure	\$60.70	7%	\$33.48	3%
Total Expenditure	\$892.90		\$964.10	

⁵ Average expenditure reported per person by respondents to the Trail User survey. The average is calculated taking into account both day and overnight visitors and adults and children (with each adult assigned a value of 1 and each child a value of 0.5 in the calculation). Data is collected for the individual respondent or group of which they are part (by respondent preference) and broken down across the range of categories shown. Sample: visiting the region because of a Great Ride: YE Jun 2021 (n=2,925), YE June 2025 (n=3,854).

VISITOR EXPENDITURE (CONT.)

Survey data indicates that 52% of all trail users **are visiting the area primarily to experience the subject Great Ride**. This proportion drops to 37% for cyclists riding the trails on standard bikes and to 48% for pedestrian trail users. In contrast, the proportion increases to 76% for domestic visitors and 56% for visitors riding the Great Rides on e-bikes.

While a slightly smaller proportion of international trail users are travelling specifically to experience a Great Ride, a longer average length of stay is a key driver of their higher average expenditure per person (more than double that of a domestic visitor).

	Visiting area because of Great Ride (2025)	Average nights per person	Average party size	Average expenditure per person
Total Sample	52%	3.4	3.9	\$964.10
Domestic visitors	76%	3.1	4.0	\$806.71
International visitors	67%	5.1	3.2	\$1,793.85
Pedestrian trail users	48%	3.3	3.8	\$662.44
Cycling trail users	53%	3.4	3.9	\$1,022.85
<i>Cycling (standard bike)</i>	37%	2.6	3.7	\$695.91
<i>Cycling (e-bike)</i>	56%	3.8	4.2	\$1,240.72
<i>Cycling (mountain bike)</i>	51%	2.9	3.5	\$742.19
<i>Sample size (n=)</i>	7,475			

BUSINESS GROWTH

Collectively trail managers estimate that there are more than 2,900 individual businesses providing facilities and services for trail users, of which 546 are official trail partners.

The most commonly identified businesses are those offering accommodation (more than 2,500) and/or food and beverage services (more than 1,700 in total). There are also a significant number of businesses providing bike hire, transport services, and guides or guidance for trail users (including support for self-guided trail experiences).⁶



2,920

Businesses providing facilities and services
for Great Rides users



546

Official Cycle Trail partners

Of these 2,920 businesses...	
2,582	offer accommodation on/near the trail
1,717	offer food and beverage services on/near the trail
230	provide advice and support for self-guided trail experiences
88	offer guiding/guided tours
138	offer bike hire
136	provide bike shuttle/other transport to/from the trail
287	provide other activities commonly packaged with, or promoted to, visitors alongside your trail
780	offer other facilities or services

⁶ Trail Manager survey 2025 (n=21, removed 1 outlier)

BUSINESS GROWTH (CONT.)

New Business Development

Data provided by the 229 businesses that participated in the 2025 Trail Stakeholder survey indicates that 104 (45%) had been established since the opening of their local Great Ride. Just one in five had been established **solely** because of the trail, but the trail had been a factor in the formation of three quarters of these new businesses.⁷



businesses were established **after the Great Ride opened**

Operating Area (New Businesses)	
Commercial accommodation	49%
Cycle transport/shuttle services	34%
Cycle hire	31%
Specialised cycle tours	22%
Food and beverage services	18%
Other transport services	7%
General sightseeing/tours	4%
Visitor activities or attractions	4%
Visitor information services	3%
Other facilities or services	2%

REASON FOR BUSINESS ESTABLISHMENT



20%

Great Ride was the **only** reason business was established

20%
main reason

35%
one of the reasons

25%
not a factor

BUSINESS GROWTH (CONT.)

Business Expansion

It follows that 125 businesses responding to the Trail Stakeholder survey (55%) had been established prior to the opening of their local Great Ride. However, almost three quarters of these businesses had expanded or added new services subsequently, in most cases (solely or partly) **because of** the cycle trail.⁸



businesses **pre-dated**
the Great Ride

Operating Area (Pre-Existing Businesses)	
Commercial accommodation	50%
Food and beverage services	24%
Cycle hire	21%
Cycle transport/shuttle services	20%
Specialised cycle tours	13%
Other transport services	10%
Visitor activities or attractions	8%
Visitor information services	7%
General sightseeing/tours	5%
Other facilities or services	4%
Other	12%



BUSINESS EXPANSION

72%

Have expanded or added new services
since the Great Ride opened



30%

of these businesses had expanded/added
services **solely** because of the Great Ride

53% partly because of the Great Ride

17% not because of the Great Ride

Expansion Area (Pre-Existing Businesses)	
Commercial accommodation	34%
Food and beverage services	28%
Cycle hire	22%
Cycle transport/shuttle services	21%
Specialised cycle tours	13%
General sightseeing/tours	10%
Visitor activities or attractions	9%
Visitor information services	7%
Other facilities or services	6%
Other transport services	12%
Other	19%

BUSINESS GROWTH (CONT.)

Asked about the impacts of the Great Ride, the great majority of businesses established prior to their local Great Ride pointed to a positive contribution in regard to the number of customers served and income/turnover generated. Half had seen an increase in average expenditure per customer and slightly over half a positive impact on their bottom line.

As an indicator of flow-on effects, almost seventy percent of businesses also indicated that their own expenditure had increased.⁹

IMPACT OF TRAIL

(on businesses that pre-dated the opening of the Great Ride)



74%

Increased number of customers served by the business



50%

Increased average spend per customer



70%

Increased income/turnover generated by business



69%

Increased expenditure by business

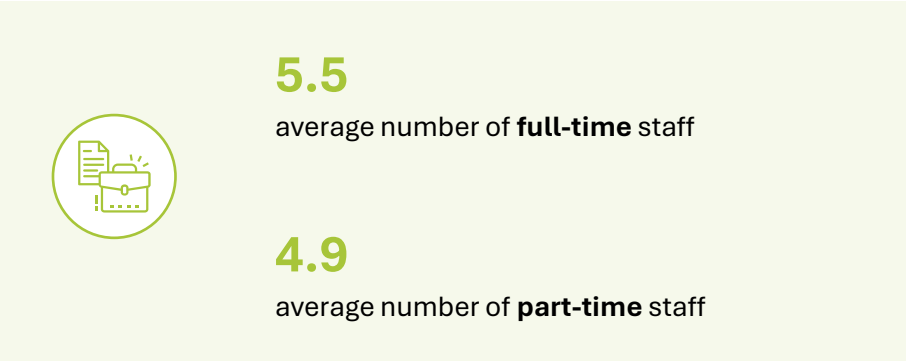


51%

Increased business profit

EMPLOYMENT

Data from businesses participating in the Trail Stakeholder survey indicates that cycle trail-related businesses employ an average of 5.5 full-time and 4.9 part-time staff. More than half of trail-related businesses operate with some seasonality of labour force (employing more people at certain times of year than others).¹⁰ Feedback from pre-existing businesses indicates that a large proportion have increased the size of their workforce as a consequence of their local Great Ride.



IMPACT OF CYCLE TRAILS ON PRE-EXISTING BUSINESSES

23%
Increased the number of **full-time** staff
(+2.8 full-time staff on average)

30%
Increased the number of **part-time** staff
(+3.5 part-time staff on average)

	All Seasonal Businesses	<i>Established</i>	<i>New</i>
Full-time staff	Average of staff employed		
Peak season	10.6	14.3	5.8
Off-peak season	7.2	10.0	3.4
Part-time staff	Average of staff employed		
Peak season	6.5	7.6	5.1
Off-peak season	3.1	3.7	2.4

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

SOCIAL IMPACTS

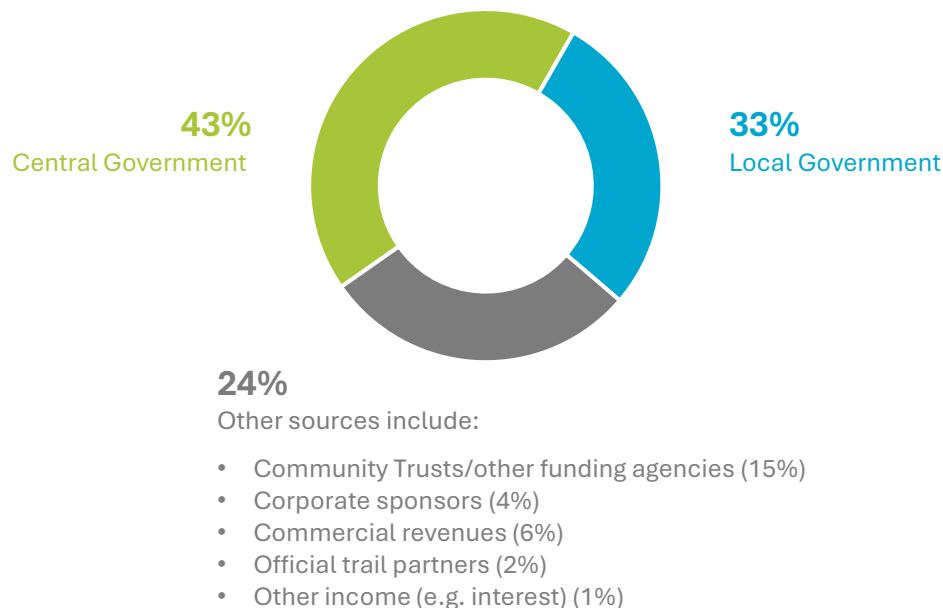


LOCAL FUNDING AND VOLUNTEER CONTRIBUTIONS

Based on data provided by Trail Managers, Local Government provided one-third of all income for the trails in their last financial year, with additional income from local community trusts/funding agencies (15%) and official trail partners (2%).¹¹

Across the Great Rides network, an estimated 565 individuals worked as volunteers, contributing almost 18,000 hours in the last 12 months. At the average hourly wage of \$35, this equates to a further local contribution of more than \$600,000 in value.¹²

FUNDING SOURCES FOR GREAT RIDES OF NZ



VOLUNTEER CONTRIBUTIONS



565

Volunteers across the Great Rides network



17,795

Hours contributed in the last 12 months



\$622,825

Total value of contribution

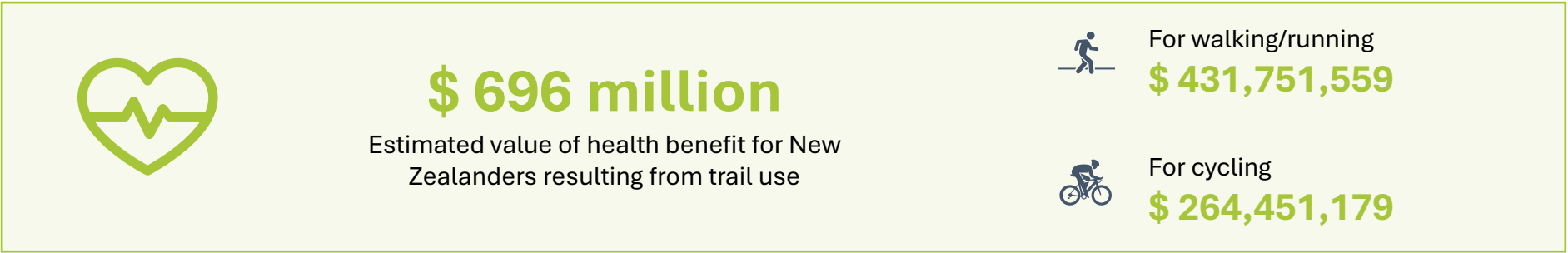
¹¹ Source: Trail Manager survey 2021 (n=22). Note that income reported by Trail Managers excludes separate investment in the trails by DOC and Waka Kotahi, and funding made available by MBIE and directed through local government agencies for trail development.

¹² The total value of volunteer contribution has been calculated by multiplying the total volunteer hours reported by Trail Managers by the average hourly wage of \$35 per hour (source: Statistics NZ, Quarterly Employment Survey, June 2025)

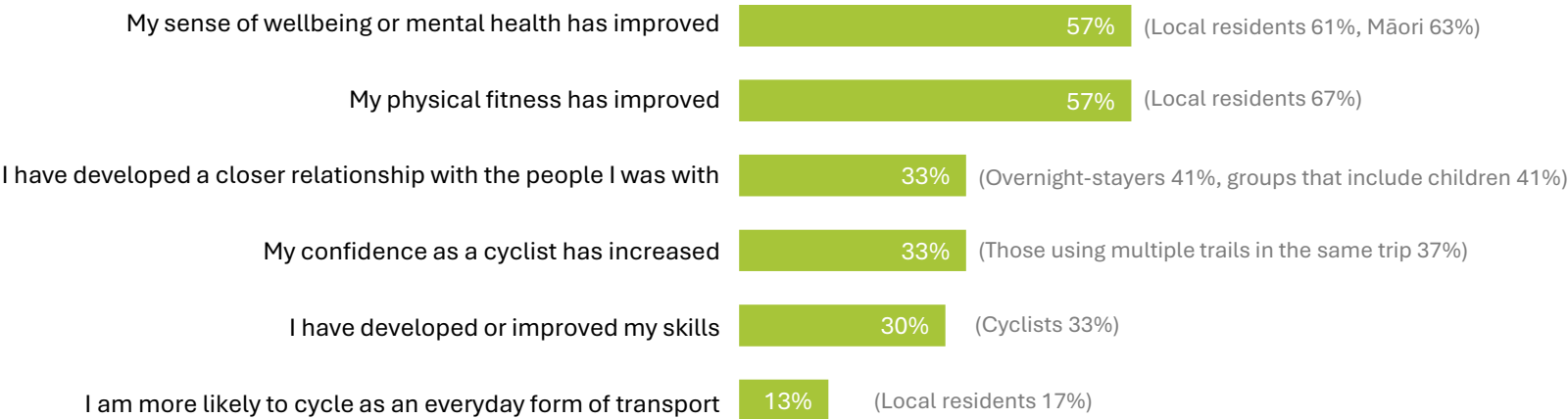
FELT IMPACTS & HEALTH BENEFIT

Using Waka Kotahi’s Monetised Benefits and Costs Manual 2024 as a reference, the combined health benefit of **New Zealand residents** using the Great Rides has been estimated at more than \$696 million for the year to June 2025.

In the same period, almost 60% of trail users reported that their **physical fitness** had improved as a result of their trail experience, and the same proportion reported a positive **mental health** benefit. Amongst other benefits reported by trail users were greater social connection, and skill development.



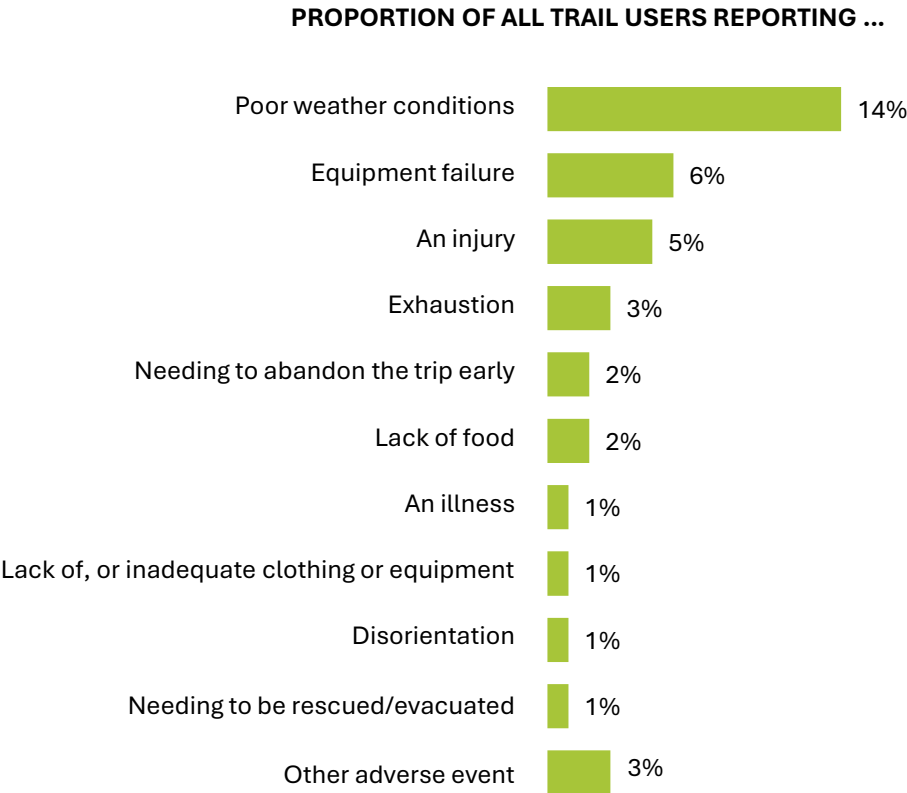
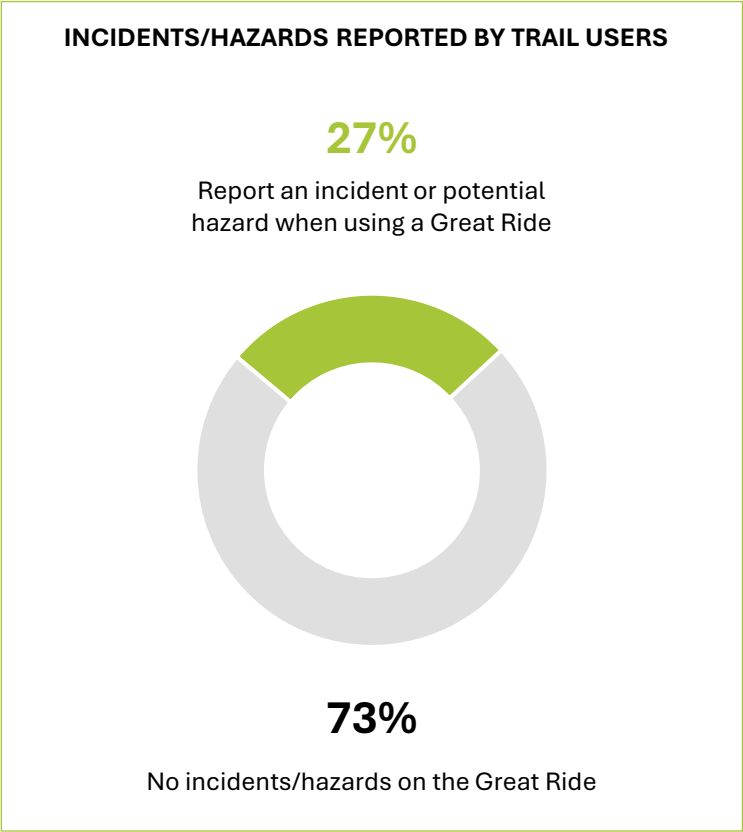
FELT HEALTH IMPACTS



INCIDENTS/HAZARDS REPORTED BY TRAIL USERS

The extent to which health and safety-related incidents and hazards are reported by trail users is an indicator of potential risk and the types of incidents/hazards reported highlight areas in which further support may be needed if trail users are to be prepared for any challenging situations they may face.

While fewer than 30 percent of trail users did report a safety-related incident or hazard in the year to June 2025, more than one in ten encountered adverse weather (14%), six percent equipment failure and five percent **some form of injury**.¹³ While the number and severity of injuries occurring on the Great Rides is difficult to determine as many are not officially reported to Trail Managers, an indication of 5% equates to something in the order of 129,000 injury incidents. While each injury carries a cost that should in principle be offset against the estimated health benefit there is insufficient data available to inform this analysis.



INCLUSIVENESS

Based on data for the year ending June 2025, those identifying as NZ European are significantly over-represented amongst New Zealand-resident trail users and those identifying as Māori, Pasifika and all other ethnicities are under-represented.

In total, 2.5 percent of trail users report a disability or impairment (as measured using the Washington Short Set of questions relating to disability). This equates to one quarter of the incidence of disability amongst the wider population as reported by Sport NZ Ihi Aotearoa in its Active NZ 2023 Survey.¹⁴

DISABILITY

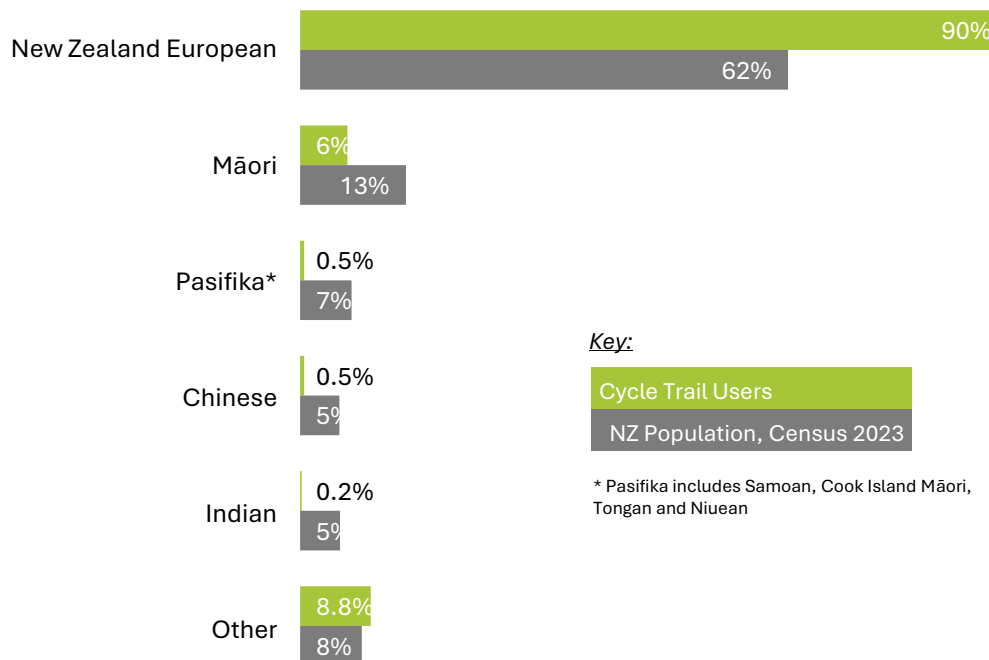


2.5%

report some form of disability or impairment

¹⁴ Disability was measured using the Washington Group Short Set of questions, based on an individual reporting 'a lot of difficulty' or 'cannot do at all' in at least one domain measured. This measure was also used by Sport NZ for its Active NZ 2023 survey, from which it reports disability at 10% (Disability 3).

ETHNICITY



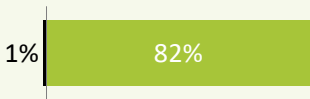
COMMUNITY SENTIMENT

The great majority of organisations and groups responding to the 2025 Trail Stakeholder survey reported that their local Great Ride had positive impacts across all four domains measured: social wellbeing; community values, culture and heritage; local economy; and natural environment.¹⁵

IMPACT OF THE GREAT RIDES ON...



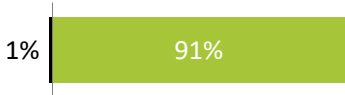
The social wellbeing of your community



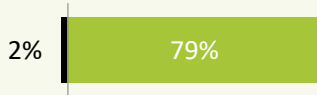
Your community's values, culture and heritage



Your local economy



The natural environment in your area



Negative* Positive*

¹⁵ Source: Trail Stakeholder Survey 2025 (n=434)
*Negative = Very negative + Negative; Positive = Very positive + Positive;
'Neither positive nor negative' and 'Don't know' responses excluded

COMMUNITY SENTIMENT (CONT.)

Strong community support for the Great Rides is also evident in stakeholder responses to a range of propositions 'tested' in the 2025 Stakeholder Survey. Nine in ten stakeholders agreed that their local Great Ride provides a high-quality experience for trail users, and a similar proportion agreed that the Great Ride had increased the profile of their area.

Almost 90% of stakeholders indicated that their local Great Ride is valued by the community, a source of pride, and/or part of the community's identity. More than 70% indicated that it had been a catalyst for community development, and/or for local investment.¹⁶

% WHO AGREE THAT THEIR LOCAL GREAT RIDE...



WIDER IMPACTS

A total of 67 representatives of Chambers of Commerce and other local business groups, Territorial Authorities and Economic Development Agencies/Regional Tourism Organisations responded to the Trail Stakeholder survey. These stakeholders were asked to comment on the extent to which their local Great Ride had been a factor in drawing people to their region to live, work, study and/or play.

Feedback indicates that the Great Rides are a significant drawcard for visitors to the regions and that they also play an important role in attracting people to live and do business or invest in the regions.¹⁷

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



91%

attracting **domestic** visitors
to the area

63%

attracting **international** visitors
to the area



55%

attracting people to
live in the area

(47% in 2021)



21%

attracting people to
study in the area

(8% in 2021)



64%

attracting people to do business
or invest in the area

(62% in 2021)

WIDER IMPACTS (CONT.)

While based on very small sample sizes, feedback also indicates that the Great Rides are important to a range of other groups, including lwi/hapū/marae groups, education providers and (competitive or social) recreation or sporting clubs and groups.¹⁸

% WHO BELIEVE THE GREAT RIDES ARE IMPORTANT...



64%

to their lwi, hapū or marae



95%

as a facility for their students
and/or school/tertiary institution



81%

as a resource for members of
their group/ club

ENVIRONMENTAL IMPACTS



FELT IMPACTS - ENVIRONMENT

Almost half of trail users report a greater appreciation of the natural environment as a result of their Great Ride experience, and a third report a greater appreciation of local culture and heritage. One in five indicate that they understand more about the natural environment, and around the same proportion that they are more conscious of their **impact** on the natural environment.

Impacts more like to be felt by...		
	21% understand more about the natural environment	• International visitors, 28% • Māori, 25%
	48% appreciate the natural environment more	• Māori, 57%
	18% are more conscious of their impact on the environment	• Pedestrian trail users, 21% • Local residents, 20% • Māori, 26%
	29% understand more about the local culture and heritage	• Cyclists, 31% • International visitors, 40% • Domestic visitors, 33% • Overnight-stayers, 39%
	30% appreciate the local culture and heritage more	• Cyclists, 32% • International visitors, 36% • Domestic visitors, 33% • Overnight-stayers, 37% • Māori, 35%

ENVIRONMENTAL CONTRIBUTION

Almost 450,000 native trees, shrubs, flaxes or rushes have been planted across the Great Rides network (more than 10% of these in the last 12 months). Almost 120 kilometres of waterways have been fenced, and almost 2,700 traps laid for pests.¹⁹

As a further contribution to the environment, the Great Rides carried trail users on almost 75,000 active transport/commuting trips in the year ending June 2025 (almost 3% of all cycle trail trips).²⁰. This was more than twice the number of commuter trips recorded in 2021, when commuter trips made up 1.5% of all trips.

ENVIRONMENTAL PROTECTION & REGENERATION



397,530

native trees/shrubs have been planted

(37,600 in the last 12 months)



47,200

native flaxes/rushes have been planted

(25,000 in the last 12 months)



118 kilometers

of waterways have been fenced

(3 kilometers in the last 12 months)



2,671

traps have been laid for pests

(695 in the last 12 months)

COMMUTER USE OF THE GREAT RIDES

For the year ending June 2025,



74,742 cycle trail trips

involved a commute to/from school or work

(representing 2.9% of all cycle trail trips taken)

In the year ending June 2021, 32,800 cycle trail trips involved a commute to/from school or work (1.5% of all cycle trail trips taken)

¹⁹ Source: Trail Manager Survey (n=22).

²⁰ Calculated by applying the proportion of trips taken for the purpose of commuting to/from school or work as reported by trail users (Trail User Survey) to trail counter data. Trail User Survey: YE June 2021 (n=6,012), YE June 2025 (n=7,475).

APPENDICES



SURVEY METHODOLOGY

TRAIL USER SURVEY

An ongoing survey of Trail Users is undertaken using a survey application developed for Ngā Haerenga NZ Cycle Trails and the 23 Great Rides that make up the network. This uses a combination of methods to access a sample that is as broadly representative of trail users as possible. These methods include: -

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

For the year ending June 2025, n=1,757 of n=7475 responses (or 24% of the total) resulted from personalised invitations sent to an identified trail user, with the balance contributed via public web link (for example, hosted on the trail website, promoted via QR code posted on-site or a local business). The response rate for those sent a personalised email invitation was 44%.

The data used for the current evaluation is based on survey samples of n=7475 trail users in the year ending June 2025 and n=6012 trail users in the year ending June 2021.

TRAIL MANAGER SURVEY

The Trail Manager survey was designed to capture the data required for this Evaluation and the survey was undertaken online in June and July 2025.

Survey invitations were emailed to each nominated trail manager on 17 June 2025. The email included a personal link which the Trail Manager clicked to complete the survey.

By end July 2025, all Trail Managers had completed the survey (n=23 or a 100% response rate).

TRAIL STAKEHOLDER SURVEY

The Trail Stakeholder survey was also designed to support the Evaluation, and the survey was undertaken online in April and May 2025.

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

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

A final total of n=1,743 stakeholder contacts were emailed with a personal invitation to complete the online survey, of whom n=434 had responded by the survey closing date of 30th May 2025 (a response rate of 25%).

USE OF TRAIL COUNTER DATA

Alongside the survey data gathered from trail users, stakeholders and trail managers, this Evaluation draws on data collected using counters on the trails. This data is used to ‘scale’ the survey data to the total population of Great Rides trail users.

As noted in the Introduction on page 3, while the trail user survey provides valuable insights on trail users and trail use, results scaled to the overall Great Rides pedestrian/cyclist population using counter data should be interpreted with some caution. Although the trail user sample size is substantial and considerable effort is made to ensure that the sample includes the full range of trail users, the extent to which it is fully representative cannot easily be determined. It is possible that frequent or local users are under-represented in the sample, and other groups over-represented (for example, cyclists relative to pedestrians).

Trail counters are installed on each of the 23 Great Rides that make up Ngā Haerenga, the New Zealand Cycle Trail, including some counters managed by the Department of Conservation and private land owners.

In late July 2025, an extract of trail counter data for the year ending June 2025 was provided by Be Counted and missing data was sourced from relevant trail managers (e.g., data collected using alternative systems).

The counter data was then analysed using a new set of algorithms developed by Jonathan Kennett for the Ministry of Business, Innovation & Employment.²¹ These algorithms are used to calculate the volume of **unique users or use occasions** on each trail, given that an individual user may be recorded at multiple counters over the length of a trail or on multiple occasions by the same counter when a trail user is walking/cycling a return route.

The resulting calculations of individual trail users were checked for consistency with 2021 outputs, reviewed with Jonathan Kennett or the relevant trail manager where needed, and then confirmed for use in the Evaluation analysis.

TRAIL COUNTS FOR THE YEAR ENDING JUNE 2025

	PEDESTRIANS			CYCLISTS			ALL USERS		
	YE Jun 21	YE Jun 25	YoY Change	YE Jun 21	YE Jun 25	YoY Change	YE Jun 21	YE Jun 25	YoY Change
Twin Coast Cycle Trail	29,269	23,261	-21%	33,395	17,900	-46%	62,665	41,161	-34%
Hauraki Rail Trail	31,055	32,892	6%	51,008	45,005	-12%	82,063	77,897	-5%
Waikato River Trail	20,251	19,326	-5%	18,272	16,506	-10%	38,523	35,832	-7%
Te Ara Ahi	37,197	114,857	209%	62,003	116,675	88%	99,200	231,532	133%
Motu Trails	7,066	5,338	-24%	14,660	8,130	-45%	21,726	13,468	-38%
Timber Trail	4,269	3,376	-21%	14,043	11,732	-16%	18,313	15,108	-17%
Great Lake Trail	23,999	28,424	18%	23,388	20,342	-13%	47,387	48,766	3%
Mountains to Sea Trail	5,217	59,400	1039%	26,177	42,538	63%	31,394	101,939	225%
Hawke's Bay Trail	212,690	249,248	17%	214,070	203,974	-5%	426,760	453,221	6%
Remutaka Cycle Trail	235,383	221,184	-6%	81,523	67,027	-18%	316,905	288,211	-9%
Queen Charlotte Track	17,811	28,794	62%	5,145	3,762	-27%	22,956	32,556	42%
Coppermine Trail	37,276	28,042	-25%	64,997	44,633	-31%	102,272	72,674	-29%
Tasman's Great Taste Trail	115,606	74,308	-36%	199,873	240,367	20%	315,478	314,675	0%
St James Cycle Trail	2,024	5,591	176%	4,114	2,847	-31%	6,139	8,438	37%
Old Ghost Road	5,663	5,365	-5%	6,277	4,295	-32%	11,940	9,660	-19%
West Coast Wilderness Trail	33,903	34,402	1%	39,284	49,023	25%	73,187	83,425	14%
Alps 2 Ocean	44,442	61,506	38%	24,092	45,991	91%	68,534	107,497	57%
Otago Central Rail Trail	25,722	6,542	-75%	54,659	15,266	-72%	80,380	21,808	-73%
Roxburgh Trail	10,974	9,705	-12%	12,613	12,879	2%	23,586	22,584	-4%
Clutha Gold Trail	5,373	12,185	127%	7,386	16,598	125%	12,759	28,782	126%
Lake Dunstan	N/A	14,550	N/A	N/A	57,065	N/A	N/A	71,614	N/A
Queenstown Trails	189,762	285,647	51%	126,512	195,161	54%	316,274	480,808	52%
Around the Mountains	3,962	8,064	104%	4,261	7,586	78%	8,222	15,650	90%
ALL TRAILS	1,098,913	1,332,006	21%	1,087,748	1,245,299	14%	2,186,662	2,577,304	18%

