

# Trail Fund 2016 Rider Survey

---

Trail Fund NZ (TF) invites mountain bikers and other trail users across New Zealand to fill in a survey each year. The purpose of the survey is to better understand (1) the individuals using the trails in New Zealand, (2) how are the trails used, (3) issues and challenges that need to be addressed, and (4) awareness of, and interest in, Trail Fund NZ's mission, actions and fundraising programs.

This report provides an overview of the results from the 2016 Rider Survey. The survey was designed and administered on SurveyGizmo with some input from the Department of Conservation (DoC) and promoted through social media in November and December 2016. We received a total of 1663 responses, more than double from the previous year and a slight increase from 2014. However, only 1271 respondents completed the survey in its entirety. The survey is very lengthy and requires a certain time commitment from the respondents. While it was made clear in the introduction, it is possible that respondents expected it to be shorter.

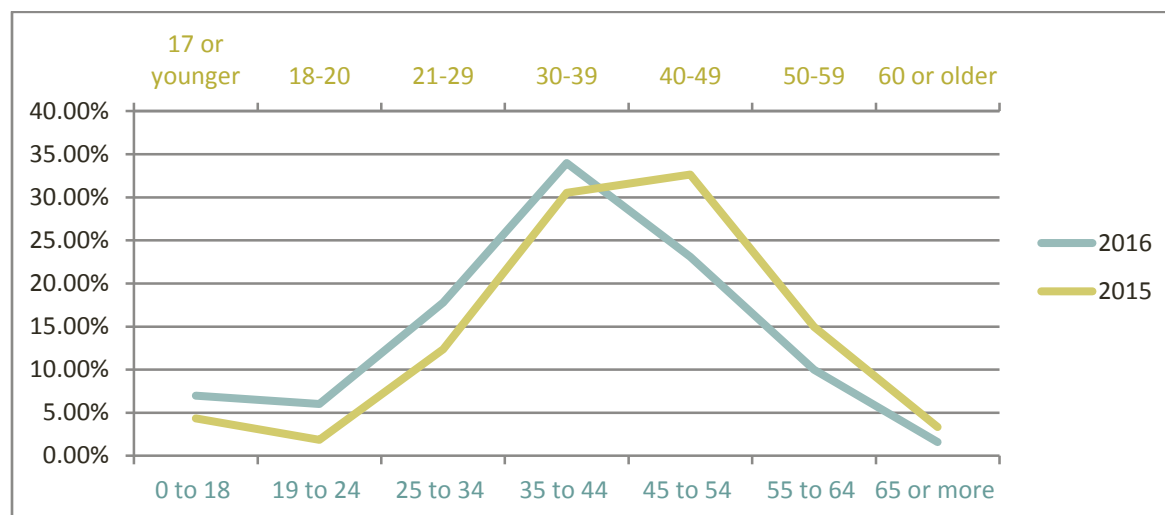
## **New Zealand mountain bikers and trail users**

### **General demographics**

Mountain biking has traditionally been a male-dominated sport worldwide but in recent years the sport has become increasingly popular with women. 22.3% of the respondents this year were female, an increase of 6 points from 2015. This indicates that women ride more and also engage in the mountain biking community more – evidenced because the survey was primarily shared on Facebook through mountain bike clubs and groups.

57.1% of the respondents are between 35 and 54 years old. The results are not accurately comparable to the 2014 and 2015 data as the age brackets were changed upon request from DoC; they do however show a similar distribution curve.

Figure 1: Age of respondents – distribution curve



There was an increased representation of younger respondents this year compared to 2015, potentially linked to the survey being shared extensively by mountain biking clubs on Facebook.

Individuals within the 35-44 and 45-54 age brackets are more likely to have a stable and higher income and therefore a higher discretionary income than younger or older individuals. In addition, mountain biking is a sport that is more often practiced by low deprivation groups (higher wealth). The results show that 45.6% of the respondents have an annual household income between \$100,000 and \$200,000. Only 11.6% reported an annual household income lower than \$50,000; an increase from last year likely due to the increased representation of younger respondents.

[An error in the design of the question did not allow respondents to disclose a household income above \$200,000 – while this error was pointed out during the first week of the survey the question was not changed to avoid skewing the responses. It is possible that a number of respondents who picked the highest bracket actually have a higher household income; an increased in the proportion of respondents choosing *Prefer not to disclose* could also indicate that some respondents with higher income picked that option.]

Table 1: Age of respondents

	Percent
0 to 18	7.0%
19 to 24	6.0%
25 to 34	17.8%
35 to 44	34.0%
45 to 54	23.1%
55 to 64	10.0%
65 or more	1.6%
Prefer not to disclose	0.5%
Total	100%

Table 2: Income of respondents

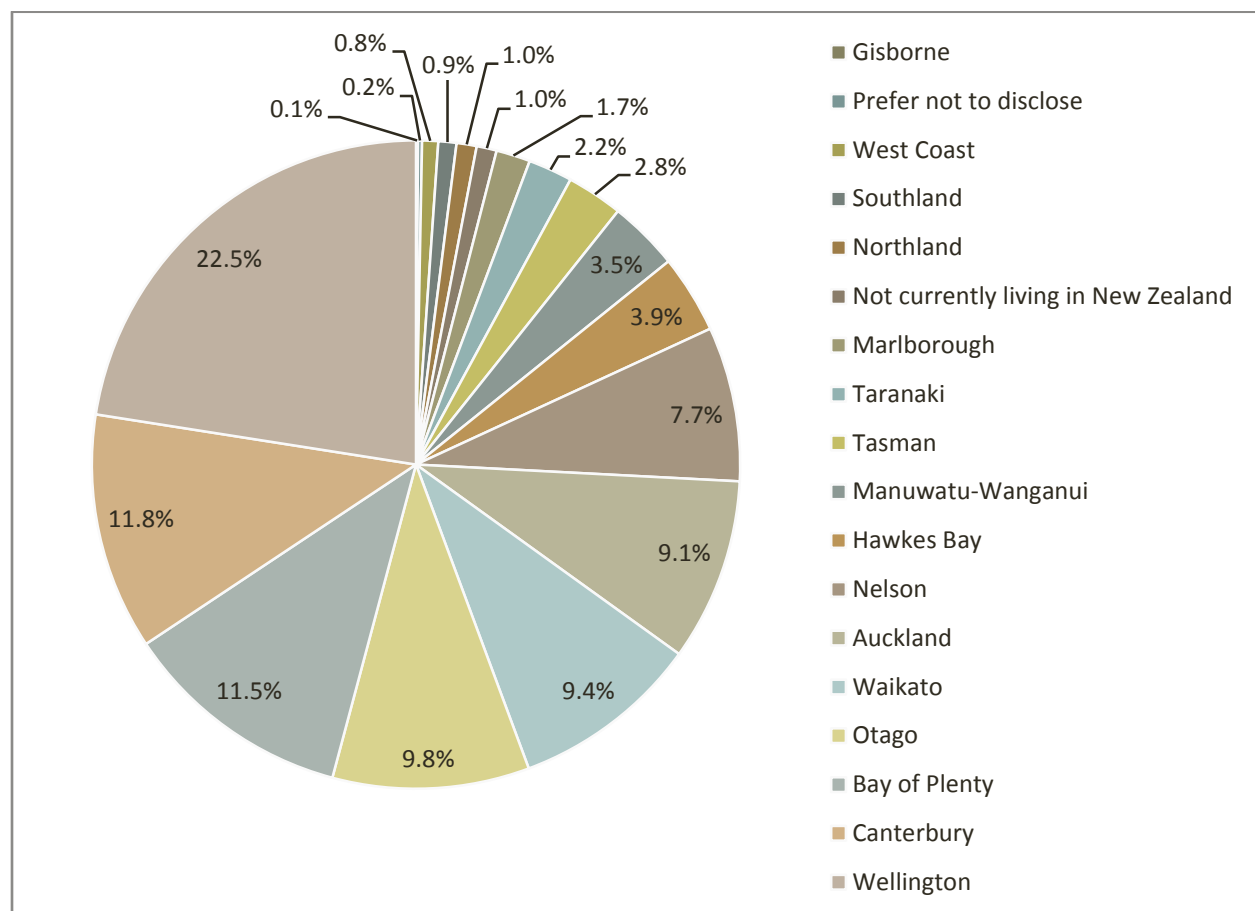
	Percent
\$0 to \$20,000	3.1%
\$20,001 to \$50,000	8.5%
\$50,001 to \$100,000	30.4%
\$100,001 to \$200,000	45.6%
Unwaged / Student / Bank of Mum & Dad	3.7%
Prefer not to disclose	8.6%
Total	100%

## Location

We can assume that a majority of the respondents live in large urban centres with 53.2% indicating living in the Auckland, Wellington, Canterbury or Otago regions. On the other hand, Southland, West Coast and Gisborne have the lowest number of respondents. The geographic distribution is in general representative of that of the national population.

Wellington is once again over-represented in the survey due to most of the committee members of TF living in Wellington (and tending to promote the survey to personal acquaintances). However, with 22.5% of the respondents, the proportion is lower than in 2015 (when 38.7% lived in Wellington). The TF team tried to reach out to all regions to obtain a better geographic spread compared to previous years. It resulted in a shift towards a more representative sample of New Zealand's riders. This could also indicate that TF is slowly increasing its reach around the country as a national organisation.

Figure 2: Region of residence



## Mountain biking economy

Mountain bikers spend a relatively large amount of money on their hobby compared to other sports. In 2016, 60.1% of respondents said they spent more than \$2000 over the previous 12 months on mountain biking expenses – including 24.8% who spent over \$6000. The average spent was \$3,589. There is a slight decrease from 2015 in the proportion of respondents who spent less than \$2000. There is also a

slight increase in the proportion of respondents spending over \$6000 (21.8% in 2015). Mountain biking can be an expensive hobby and this result reflects the increasing number of high-end (and thus expensive) bikes and accessories on the market competing for a share of the wealthy mountain bikers segment with relentless advertising for the newest and best technology and improvements.

Table 3: Mountain Biking Spend

	Percent	Descending cumulative	Ascending cumulative	Compared to 2015
<b>no money</b>	0.9%	0.9%	96.2%	
<b>\$1-1000</b>	18.6%	19.4%	95.4%	=
<b>\$1001-2000</b>	16.8%	36.3%	76.8%	-
<b>\$2001-3000</b>	14.6%	50.8%	60.0%	
<b>\$3001-4000</b>	8.7%	59.5%	45.4%	-
<b>\$4001-5000</b>	8.3%	67.7%	36.7%	
<b>\$5001-6000</b>	3.7%	71.4%	28.5%	-
<b>more</b>	24.8%	96.2%	24.8%	+
<b>not applicable</b>	3.8%			

## The riding

### Mountain biking practice

For the first time this year the survey asked about riding ability and preferred trail grades. Those questions were requested by DoC in order to better understand the preferences of New Zealand mountain bikers; the questions are also useful to learn if the survey results offer an accurate representation of all New Zealanders who take part in mountain biking.

The respondents mostly rate themselves as *intermediate* (53%) and *advanced* (32.7%) riders. Only 4.5% rate themselves as *novice*. These results indicate that the survey primarily reaches what can be called “serious” mountain bikers – meaning individuals who dedicate a significant amount of time and effort to their hobby. Sharing the survey on social media through mountain biking specific channels probably increases this bias. It can also be argued that novices and non-serious mountain bikers are less likely to think they should contribute to surveys like this one.

Congruently, preferred tracks were grade 3 and 4 (36.7% and 35.3% respectively). Not surprisingly, there is a direct correlation between the stated riding level and preferred grade.

Table 4: Preferred grades according to experience level (bold percentages indicate the most preferred grades for each experience level)

	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Total
Expert rider			0.2%	1.7%	<b>3.5%</b>	<b>4.2%</b>	9.6%
Advanced rider			3.2%	<b>17.3%</b>	<b>10.4%</b>	2.4%	33.4%
Intermediate rider	0.1%	2.8%	<b>33.1%</b>	<b>17.2%</b>	0.8%	0.2%	54.1%
Novice rider	0.4%	<b>1.8%</b>	<b>0.6%</b>	0.1%	0.0%	0.0%	2.9%
Total	0.5%	4.6%	37.1%	36.3%	14.7%	6.8%	100.0%

Similarly to results from previous year, the majority of respondents ride 2 to 3 times a week (55.6%) or less (31.7%). Respondents who rated their abilities higher tend to ride more often with 30.3% of *expert* riders and 16.5% of *advanced* riders riding 4 times a week or more.

Table 4: Riding frequency

	Once a week or less	2 to 3 times a week	4 to 5 times a week	6 times a week or more	Grand Total
Expert rider	1.0%	5.7%	2.4%	0.6%	9.6%
Advanced rider	7.2%	20.6%	5.3%	0.2%	33.4%
Intermediate rider	21.3%	28.7%	3.9%	0.2%	54.1%
Novice rider	2.1%	0.6%	0.2%	0.0%	2.9%
Grand Total	31.7%	55.6%	11.6%	1.0%	100.0%

Respondents most frequently go trail riding (includes cross-country and all-mountain) and the least popular use of trails is cyclocross. Non-biking activities are also popular with 38.7% using trails for running and 69.4% using trails for walking at least occasionally. Respondents use trails for an average of 3.7 different activities. This highlights the demand for a variety of trails that can fulfil the needs of numerous trail users.

Table 5: Trail use

	Never	Occasionally	Regularly
Trail riding (cross-country, enduro)	4.0%	19.8%	76.2%
Downhill riding (downhill specific tracks)	34.1%	42.7%	23.2%
Cyclocross	86.8%	10.0%	3.1%
Dirt jumps / pump track	48.3%	45.8%	5.9%
Trail running	61.3%	26.5%	12.2%
Walking and tramping (including dog walking)	30.6%	49.1%	20.3%
Used trails as part of your commute	65.0%	26.1%	8.9%

The respondents mostly ride for fun (96%) and fitness (88.1%) but all suggested motivations were popular. This implies that mountain biking is a well-rounded activity with positive health and wellbeing benefits. Among the other motivations listed in the open-ended field, most relate to a general sense of enjoyment and wellbeing, particularly linked to being in the outdoors and being able to relieve stress and the pressure of everyday life through exercise.

Only 36% of respondents indicated *training and racing* as a motivation but 57.8% have participated in a race or organised event over the previous 12 months. This number is higher than in 2015 and could reflect the higher proportion of younger respondents – a group who tends to participate in events more frequently than older age brackets. Most popular event types are cross-country (52.5%) and enduro (46.8%) with a sharp drop in participation rate for all other events. In the open-field option, most answers revolve around endurance, multisport and BMX events. In future years, TF should investigate how many races and organised events respondents participate in.

Table 6: Style of events participated in

	Percent
Cross-country	52.5%
Enduro	46.8%
Super D	15.2%
Downhill	16.0%
Cyclocross	8.7%
Dirt jump / pump track	2.9%
T rail running	10.4%
Orienteering	7.9%
Adventure racing	9.5%
Off-road duathlon or triathlon	5.9%
Other	7.3%

In some races and events, a levy can be charged to the organisers (and sometimes to the participants) for trail usage. Almost 48% of the respondents support such levies and another 38.6% declared being neutral on the matter. Those supporting a levy argued that the funds raised should go towards trail building and maintenance which are usually underfunded and volunteer-led – it would offset the heavy track use during a race or event which means more maintenance is required.

*“Tracks get much higher than normal use during an event especially in wet weather. Event organisers should be responsible for returning tracks to original or better condition.”*

Those who did not support a levy argued that events and races were already expensive and that such practice would raise the prices even more. Many respondents commented that all profits were usually redirected towards clubs and trails anyway, and that a specific levy was not required.

*“Will push the costs of events up and reduce participation; events are good to foster a sense of community for the trails.”*

## Social activity

Mountain biking is a sport that participants can practice alone or in group. The majority of the respondents ride with friends (96.3%) or alone (94.3%) at least occasionally. 61% of respondents who have children ride with them at least occasionally and 62.8% of respondents who indicated having a partner ride with them. The next survey could inquire about children’s interest in mountain biking and their participation in school or after school programmes.

62.6% of respondents are motivated by the social aspect of mountain biking; 51.6% participate in organised rides through clubs or formal groups. This number has increased from last year, possibly indicating an increased in organised mountain biking groups through bike shops and social media.

Table 7: Riding partners

	Never	Occasionally	Regularly	Not applicable
<b>By myself / solo ride</b>	5.5%	36.6%	57.7%	0.2%
<b>With friends</b>	3.2%	43.8%	52.5%	0.5%
<b>With my children</b>	26.7%	29.9%	11.8%	31.6%
<b>With my partner</b>	32.5%	35.9%	18.8%	12.8%
<b>With a club or group (regular organised ride)</b>	46.6%	38.4%	11.3%	3.7%

## The trails

37.2% have paid an access fee to ride in the previous 12 months and 51.3% have paid for commercial uplifts.

Most respondents (57.3%) have ridden trail on DoC land – an increase from last year (51.9%) – but 15.4% were not sure. There is an increase awareness of DoC trails (23.8% in 2014 and 20% in 2015 were not sure).

36.7% of the respondents admitted to riding illegal trails – on par with 2015 – and 12.6% were unsure about the status of some of the trails they ride. There are on-going political issue between different types of trail users, including mountain bikers deliberately riding trails closed to them, and those building and maintaining trails (legally and illegally).

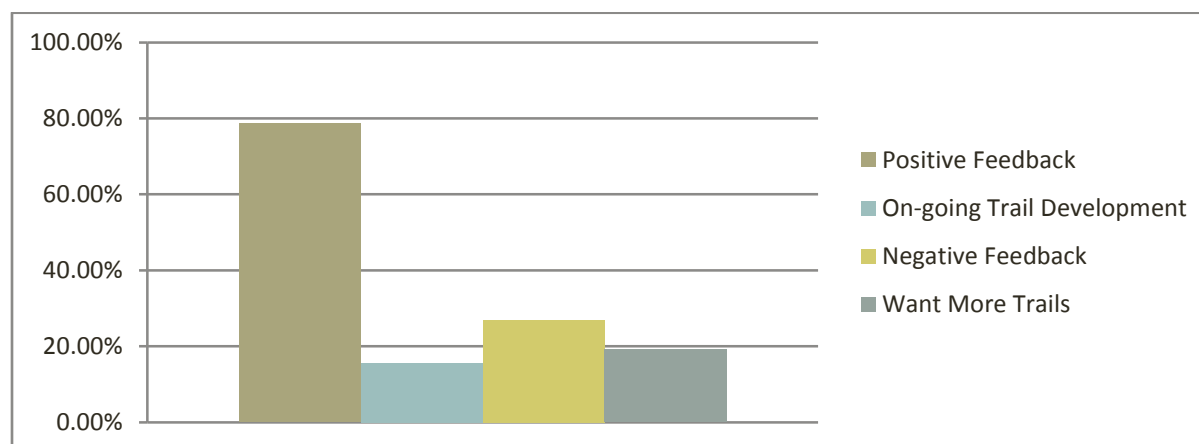
77.6% of the respondents reported no conflict on the trails – a slight increase from 2015 (75.7%). Most frequent conflict reported was between mountain bikers and walkers (13.8%) almost double from last year (7%), as well as dogs and their poo (9.3%).

The results show an increase in the proportion of respondents who are members of cycling or mountain biking clubs (63.7% compared to 59.3% in 2015) and members of trail building or supporter groups

(29.1% compared to 15.8% in 2015). Social media groups are popular with 45.8% of respondents being part of at least one. Only 18.3% reported not being part of any formal or informal group.

We received 1091 comments when we asked respondents their thoughts about their local trails.

Figure 3: Feedback on local trails\*



\*Percentage add up to more than 100% as comments were broken down in separate elements

The majority of comments were overwhelmingly positive. *Good, awesome* and *great* were the most common descriptors used.

“The Auckland region is well served with a good variety of trails given its topography” Male, 45 to 54, Advanced, Auckland

“We live in the best part of the world for mountain bike tracks. There are plenty of different trails for different users. I live 5 minutes from a massive trail network, second to none.” Female, 45 to 54, Advanced, Bay of Plenty

“I live in an area with a fantastic selection of trails, the Waikato River trail is at my doorstep, Tokoroa, Te Miro and Rotorua parks are less than an hour away and the central plateau is full of day trip rides. I have all bases covered.” Male, 45 to 54, Intermediate, Waikato

“Wellington is awesome. Variety of trails, easy to access, close proximity. Friendly inclusive mtb community” Female, 35 to 44, Advanced, Wellington

Many respondents noted the growing trail networks and on-going development they see in their region.

“There is ongoing work here to improve and lengthen trail network.” Male, 55 to 64, Novice rider, Waikato

“Trails are pretty good. Good access and variety and it's only getting better.” Male, 35 to 44, Intermediate, Canterbury



However many reported issues regarding the insufficient number of tracks and/or of variety as well as the poor quality and maintenance of their local trails:

“More difficult challenging trails would be good. There seems to be a large number of intermediate trails being built but nothing to cater for the core group of more experienced riders.” Male, 25 to 34, Expert, Wellington

“There seems to be a loss of the old fashioned single track, as most newly formed trails are digger/machine built. I have enjoyed getting out into raw native track, like Te Iringa and some tracks in the Ruahine Ranges. The newer trails are great for encouraging new riders and families, but they often become 'Strava highways'.” Male, 35 to 44, Advanced, Hawkes Bay

“I have found all of the DoC designed trails to be over developed and bland - lacking in the natural character and flow that make mountain biking what it is.” Male, 55 to 64, Advanced, Wellington

“Not enough easy trails to get people into the sport. I constantly run into novices, or people with kids, who want easy trails close to where they live. A huge latent demand for these.” Male, 55 to 64, Intermediate, Tasman

In general, happy and unhappy people alike wanted more trails:

“Good tracks but need to be expanded. This region is growing and riders with it.” Male, 35 to 44, Advanced, Bay of Plenty

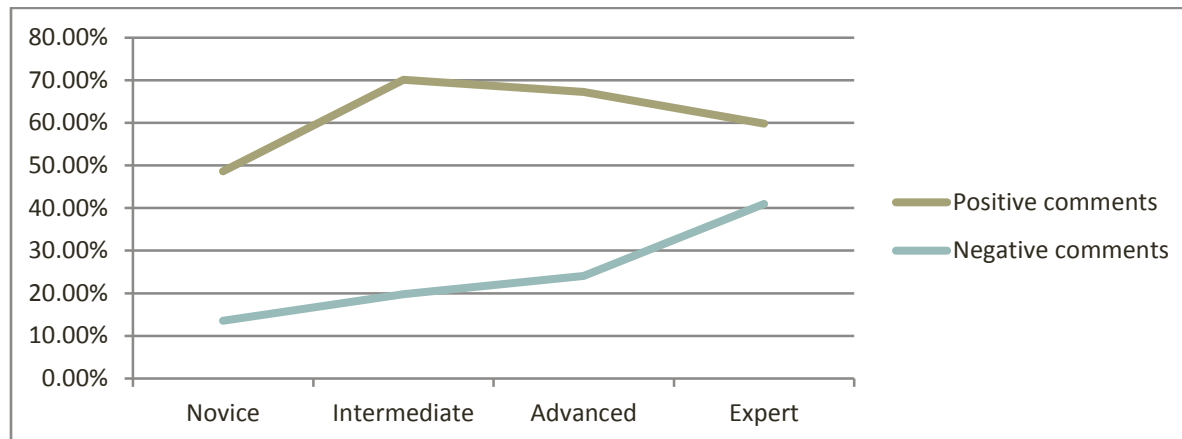
“Lots of tracks close by. Tracks generally good quality. Can always have more tracks :)” Male, 19 to 24, Advanced, Wellington

While most region follow a pattern similar to the overall one (see appendices for regional breakdowns), some stand out.

- Regions with a higher rate of positive feedback: Bay of Plenty, Canterbury, Hawkes Bay, Manawatu-Wanganui, Nelson, Tasman, Waikato and Wellington;
- Regions with a higher rate of negative feedback: Auckland, Marlborough, Northland and Southland;
- Regions where there was limited or no mention of development: Bay of Plenty, Marlborough, Nelson, Northland, Southland and West Coast;
- Regions with more frequent requests for more trails: Auckland and Marlborough.

Expert riders were noticeably more likely to make negative comments (41%) while intermediate and advanced riders were more likely to make positive comments (respectively 70% and 67%)

Figure 4: Comments per skill level

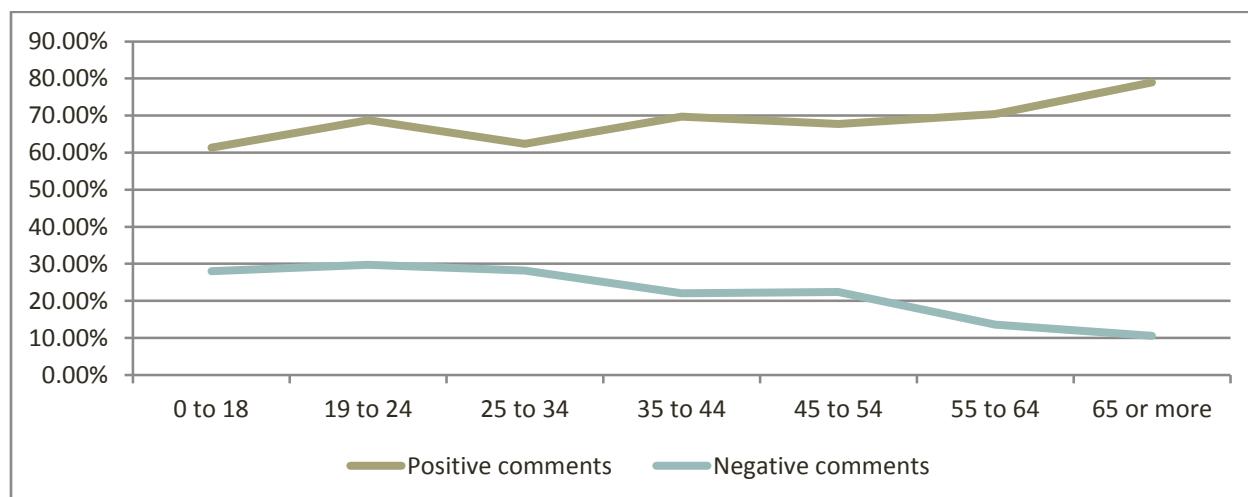


People who have been involved in trail building in the previous 12 months were more likely to make negative comments (28% versus 18%).

Riders preferring more challenging trails were more likely to make negative comments (46.5% of those preferring Grade 6 trails compared to 21% overall for all other preferences).

As age increased, respondents were more likely to make positive comments and less likely to make negative comments:

Figure 5: Comments per age



Common issues raised (20.4% of comments mentioned at least one issue) included:

- Getting access to land (41 comments)

"Takes far too long to drive to and return to closest trails (e.g., Woodhill, Riverhead). Don't have the time to waste getting to and from trails, and it costs in petrol and environmental impact to get to a forest where riding is allowed. Would love access to more natural trails in local bush and for people to be more forgiving to shared trail use - both riders and walkers. Many places in Europe everyone accepts and tolerates all users of the nature trails more readily." Male, 35 to 44, Intermediate, Auckland

- Needing to drive to trails or ride on roads which could be dangerous (41)

"Not enough tracks accessible without the use of a car." Female, 35 to 44, Intermediate, Bay of Plenty

"Main drawback of our main MTB park in Palmerston North (Arapuke Forest Park) is that it is a little more than a bike ride to get to the start of the trails" Male, 55 to 64, Intermediate, Manuwatu-Wanganui

"Lots of tracks available all over the region, including close to home, but they are poorly linked together with unsafe roads and no bike lanes so many drive to the start of trails." Male, 45 to 54, Intermediate, Wellington

- Trails not allowing skill progression (not easy enough or not diverse enough) (35 comments)

"Too much of a skills gap between the easy stuff on the flat in Chch and the hills riding. Hopefully the bike park will fix this." Female, 45 to 54, Intermediate, Canterbury

"Brilliant tracks here thanks to a very enthusiastic club, a lot of volunteer hours going in. Hard to find tracks for my 12 year old to start learning on." Male, 25 to 34, Intermediate, Manuwatu-Wanganui

"Plenty of tracks, many being dumbed down to glorified bike paths. Makes it hard for beginners to advance as there isn't much option between gravel paths and grade 4 tracks" Male, 25 to 34, Advanced, Wellington

"I am concerned that the progression of tracks is not keeping up with the progression of mountain biking. Bikes and riders are more capable than ever before, but the grading of tracks doesn't reflect this. A grade 5 from 5-10 years ago is nowhere near to top of the range, and grade 6's are hard to find. A lot of the focus is on building tracks to "grow the sport" i.e. attract more people. I think more focus should be on high grade tracks - actually looking after the people that already ride bikes a lot." Male, 25 to 34, Expert, Wellington

- Issues with shared and two-way trails (29 comments)

"We need to find solutions to share trails where it is appropriate and make sure we can get MTB only tracks for health and safety reasons too." Male, 45 to 54, Expert, Wellington

"Walking trails in my area (Rotorua) are increasingly being overtaken as mixed used biking and walking/running tracks, despite the extensive biking trails already available. As both a biker and a walker I have mixed loyalties, but I am very aware that 'share with care' trails really means 'walkers watch out because a biker is about to mow you down'. The biking lobby is strong but other trail users don't have an organised voice - that doesn't mean their needs should be overlooked." Female, 45 to 54, Novice rider, Bay of Plenty

- Local government impeding the creation or expansion of trails (22 comments)

“Local council (TDC) show little interest in promoting mtn biking in the region. They have very little, and out of date, info on biking in the region.” Male, 55 to 64, Intermediate, Tasman

“ We have amazing trails in Nelson and very dedicated builders, however progression to rebuild damaged tracks and increase the network of grade 2/3 is constantly being stopped or slowed by council.” Female, 19 to 24, Intermediate, Nelson

“Kapiti Coast District Council put in place too many barriers to developing new trails.” Male, 35 to 44, Advanced, Wellington

- Existing trails being ‘dumb down’ (17 comments)

“Recent track developments have seen a lot of the tracks on the Port Hills become a lot less technical and less interesting in efforts to make them faster to ride or more accessible (maybe?). In particular Greenwood Park, Godley Head, Kennedy’s Bush, to name a few. The technical rocks made them interesting!! Even if some parts were unridable.” Male, 19 to 24, Advanced, Canterbury

- Lack of facilities around trails (maps, signs, toilets, etc.) (17 comments)

*Note: Many of the comments mentioning these issues originated from Nelson*

“Great trails. Need more signs, maps, car parks, water fountains etc. Need to make them accessible for visitors to the area” Male, 25 to 34, Intermediate, Nelson

“Nelson is an epic place to MTB! The trails are natural with plenty of challenges, however would be great to get some more beginner trails built. Also in dire need of infrastructure to support the riding and people that come here to experience it.” Female, 25 to 34, Intermediate, Nelson

- Lack of funding (10 comments)

“The QMTBC build epic trails with little funding but the council only fund wide gravel trails. It would be interesting to know which type of trails is more popular” Male, 35 to 44, Expert, Otago

“It’s a huge growing sport/recreation. More funding for MTB clubs is needed so they can expand improve their track network of trails.” Male, 45 to 54, Advanced, Waikato

- Lack of organisation for advocacy and/or trail building (9 comments)

“Otago as a region is great with awesome trails and well thought out networks but Dunedin has something missing from the big picture. Lots of good individual trails but there seems to be little thought of contemporary trail building techniques and linking areas. The area could greatly benefit from learning from others and talking to the cities riders in general what they want not just a small select group of riders.” Male, 35 to 44, Intermediate, Otago

“Auckland is severely lacking in number of trails, quality of trails and access to trails. There is so much opportunity to advocate for and build trails in reserves that are fairly close to the population but we are lacking a strong organised body like Wellington has.” Male, 25 to 34, Advanced, Auckland

Some people have unrealistic expectations “the hill is too small” and “local trail doesn’t compare to Queenstown” or “too flat” – while quality trail building can go a long way, natural terrain is the main

element that decide of the type and style of trail that can be built. Man-made mountains are not yet on the cards. Others just have high expectations:

“Not enough variety, not much in the way of progression, not enough local trails (Upper Hutt), too many rock based trails, not enough pine forest trails, too many climbing trails, need local trail network, too many machine built, groomed trails, need more natural man mad trails in areas with views and something special about the trails and how they reflect, enhance the area they are built in, they should also be dual use biking/walking to encourage more use by locals” Male, 45 to 54, Advanced, Wellington

Respondents seem aware of the work done by volunteers and provide positive feedback on the sweat and tears poured over the trails they enjoy riding:

“Awesome riding thanks to the local club and some very dedicated folk.” Male, 45 to 54, Intermediate, Otago

“Rotorua Trails Trust are fantastic trail guardians, response to feedback from users and general enquiries.” Female. 45 to 54, Intermediate, Bay of Plenty

“I think we are pretty lucky in the Waikato. Some of the local clubs are doing great work building, maintaining tracks and promoting mountain biking in the region right now.” Female, 25 to 34, Intermediate, Waikato

“We are so fortunate for the good work of the Queenstown Mountain Bike Club.” Male, 35 to 44, Advanced, Otago

Many also would like to see more people volunteering their time:

“We need more volunteers to get off their backsides and help build, plant trees and do conservation work though.” Male, 45 to 54, Expert, Wellington

“Very lucky to have so many trails. I look after trails at Papamoa and find it depressing that so few people will get involved in maintaining track, but so many will turn up for a race on them.” Male, 35 to 44, Intermediate, Bay of Plenty

## Tourism

Most of the respondents went on at least one overnight trip (24 hours or more) for the primary purpose of mountain biking (79.2%). There is a slight decrease from the 2015 survey where 82% of respondents went on a mountain bike trip or holiday. Women are more likely to travel for the purpose of mountain biking (83.5% compared to 79.5% for men). There is a strong positive correlation between the self-reported skill levels of the respondents and the likelihood of them travelling for the purpose of mountain biking.

Table 8: Mountain bike tourism per experience level

Travel for the purpose of mountain biking	Expert rider	Advanced rider	Intermediate rider	Novice rider	All respondents
No	7.4%	15.1%	23.3%	45.9%	20.8%
Yes	92.6%	84.9%	76.7%	54.1%	79.2%

Most respondents tend to travel for short trips. Of those who said they had travelled, 98.4% went away for a weekend or a long weekend, 32.2% for up to one week and 18.4% for over a week. Compared to the 2015 survey, respondents spent less money on travel; 68.2% spend less than \$500 per trip and 20.2% spend between \$500 and \$1000 (63% and 27.6% respectively in 2015). Mountain biking tourism is a regular occurrence and, based on the preferences of the respondents, self-driven short trips are the most common. It is also likely that low priced accommodation such as hostels, camping and shared houses are the preferred option.

Table 9: Length and frequency of mountain biking trips and holidays

How many trips in the last 12 months?	Weekend or long weekend	Up to one week	More than one week
One trip	25.6%	16.1%	10.9%
2 or 3 trips	34.4%	10.8%	5.0%
4 or 5 trips	15.9%	3.2%	0.6%
6 trips or more	27.0%	2.2%	2.0%
Total	98.4%	32.2%	18.4%

Most respondents (64.9%) preferred to stay in one main location when they travelled for the purpose of mountain biking, followed by off-road bike packing staying in huts or camping (22.6%). Correspondingly, the most visited destinations over the last 12 months were well-known mountain biking hubs: Rotorua, Taupo, Queenstown, Nelson and Wellington. Rotorua is also the destination that most respondents (32.7%) name as the one they visited the most over the previous 12 months. It stands out far from any other destination in New Zealand. In addition to its convenient central location in the North Island, Rotorua offers two main trail areas (Whakarewarewa Forest and Skyline) with a variety of trails and riding options, a wide range of accommodation and other hospitality services.

Nelson stands out in this year's survey with a sharp increase in respondents having visited (+5.5 points over 2015) and many repeat visits (6.1% of respondents named it as the destination they visited the most over the previous 12 months). The opening of the Wairoa Gorge to regular shuttle assisted riding, as opposed to the once-a-year race Dodgy Memorial Enduro, along with Nelson's wide variety of trails and its proximity to several longer backcountry tracks, is a perfect mix that attracts many mountain bikers.

Other destinations that received repeat visitors were larger cities easily accessible by mountain bikers from various areas:

- Wellington (Wellington City, Hutt Valley and Porirua) – 7.1%
- Canterbury (Christchurch) – 5.8%
- Otago (Queenstown) – 5.7%

Table 10: Travel destinations – Regions visited during the last 12 months

Travel destinations				
Green indicates increase from last year, Red indicates decrease				
Bay of Plenty - Rotorua	Waikato - Taupo	Otago - Queenstown Lakes	Nelson	Wellington city, Hutt Valley and Porirua
57.7%	32.0%	27.8%	27.1%	24.0%
Otago - Wanaka	West Coast	Auckland	Canterbury - Christchurch	Tasman
20.0%	19.9%	18.0%	17.2%	17.1%
Waikato - Other	Hawkes Bay	Canterbury - Castle Hill / Craigieburn	Malborough	Bay of Plenty - Other
16.7%	15.1%	14.2%	12.4%	12.1%
Wellington - Other	Otago - Other	Manawatu-Wanganui - Ohakune National Park	Otago - Dunedin	Canterbury - Methven / Mount Hutt
12.0%	10.2%	10.0%	9.5%	7.9%
Manawatu-Wanganui - Other	Taranaki	Northland	Southland	Gisborne
5.8%	5.0%	4.7%	3.7%	1.9%

The highest increases were for the West Coast (+6.8 points), Taupo (+5.7 points) and Auckland (+5.6 points) while the biggest decreases were for Manawatu-Wanganui - Other (-8.7 points), Canterbury - Methven / Mount Hutt (-2.3 points) and Wellington – Other (-2.1 points).

A slightly lower proportion of respondents went overseas to ride (8.3% compared to 9.1% in 2015).

Five destinations stood out at the top of the list of places the respondents were most looking forward to visiting over the upcoming 12 months: Rotorua (253 mentions), Nelson (173 mentions and 20 specific mentions for Wairoa Gorge), Christchurch (159 mentions and 71 specific mentions for the Adventure Park), the Old Ghost Road (157 mentions and 71 mentions for the West Coast) and Queenstown (156 mentions).

While many respondents intended to visit Christchurch after the opening of the Adventure Park, its early closure due to wildfires most likely dampened interest for the region in early 2017.

The Old Ghost Road has been a huge influence on the increased visits to the West Coast and will continue to boost mountain biking tourism. The Heaphy Track was also mentioned 22 times as a place respondents looked forward to visit in the near future.

## **Trail support**

The proportion of respondents who indicated having participated in trail building over the previous 12 months has decreased back to the 2014 level: 49.3% did in 2016 while 56.1% had in 2015. 29.1% are part of a trail builder or supporter group while 63.7% are members of a local cycling or mountain bike club.

Only 20.7% of the respondents indicated supporting TF financially through donations or purchases (a decrease of 4 points from last year). Almost half of the respondents said that supporting their local club or trail building group was their way of contributing to trail building and maintenance while another 30.9% think they should financially support trails but are not currently doing it. Main reasons for not offering financial support included not being able to afford to and being involved in hands-on trail work.

It would be interesting to obtain data regarding the proportion of club membership fees directed towards trail building. This could be part of TF providing relevant information to all trail users to allow them to make a choice regarding additional contributions.

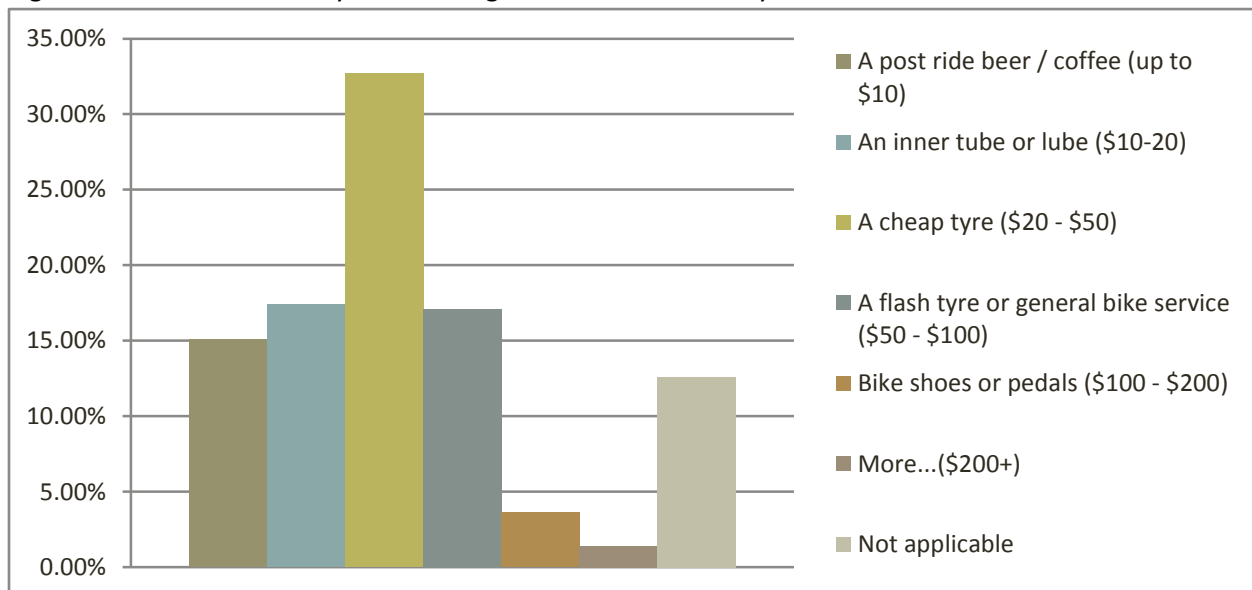


Figure 6: Are you prepared to contribute financially to develop or maintain trails?



For those who were willing to contribute financially to Trail Fund NZ, \$20-\$50 was the preferred range with 22.1% willing to donate more.

Figure 7: How much would you be willing to contribute annually to Trail Fund NZ



## Appendices – Regional Trail Feedback

