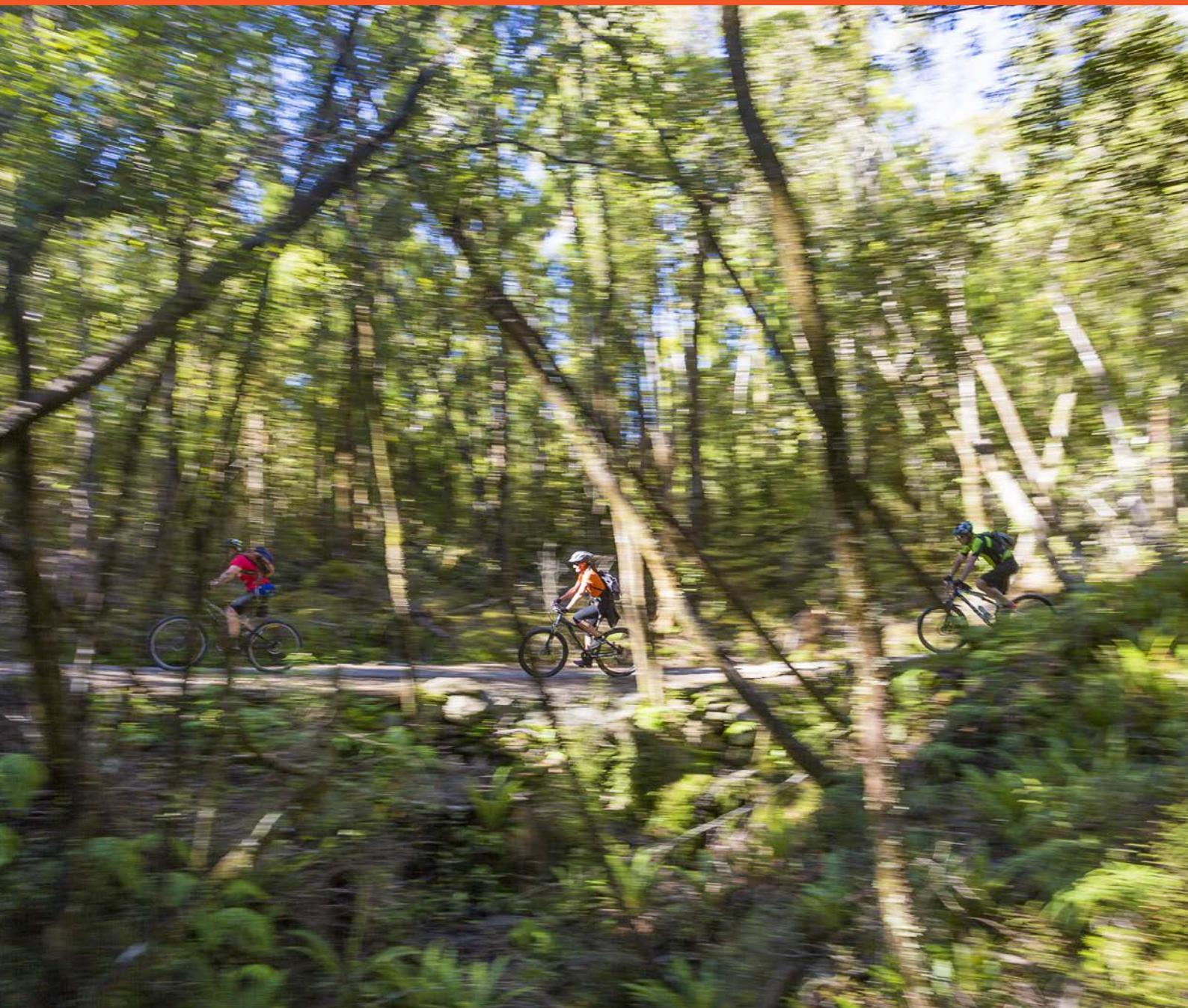


WEST COAST

WILDERNESS TRAIL

Economic Assessment and Performance Report For 2024 – 2025 Season



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1. Introduction

This report primarily presents an economic assessment of the West Coast Wilderness Trail for the period 1 July 2024 to 30 June 2025. The analysis draws on continuous professional survey research undertaken on the trail in partnership with New Zealand Cycle Trails Inc (NZCT) and the Ministry of Business, Innovation and Employment (MBIE).

In addition the report provides:

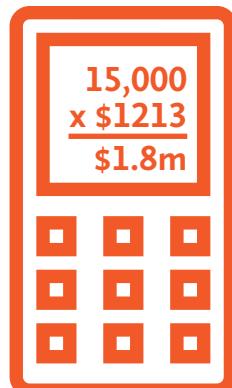
- A summary of business growth along the trail and in the towns it traverses.
- Comparative performance measures against all 22 other trails in the Ngā Haerenga Great Rides of New Zealand network.
- Newly introduced wellbeing indicators, reflecting the broader social benefits of the trail.

2. Key Overarching Benefits from the Trail

Overall Economic Return

- The trail has a direct financial return of around \$18 million per year. Another way to look at this is that, each year the trail returns cash of around one and a half times what it cost to build it in its entirety. Approximately 15,000 visiting riders use the trail. Seventy-five percent of those have come specifically because of the trail. They stay an average of 4 days. The total expenditure per person for this calendar year was \$1,213, up 10.3% on the previous year previous years.

Further to this, MBIE have a multiplier of 3.55 for trail expenditure. This considers the impact of indirect or secondary spending. Examples include a trail company or hotel paying their employees with the money they gain from riders staying and buying products. These employees then spend that money on goods and services giving it the multiplier effect. This better reflects the overall economic return from the trail, which last year was over \$50 million.



Revival of Townships

Both Kumara and Ross were in decline before the cycle trail was established. They are now examples of towns that have grown from the introduction of the trail.

Kumara now boasts several new businesses. The most prominent example, and one of the first on the scene, was the rebuild of Kumara's Theatre Royal Hotel. Demolition had been considered for the historic West Coast pub. Now offering quality accommodation, this award winning hotel also has an additional six miner's cottages and the immaculate restoration



of three early houses into quality accommodation. Further investment was made into the Route 73 Motels and Kumara Store. The Greenstone Retreat, together with a number of houses converted to Air BnBs followed. The latest development, the refurbishment of the former Empire Hotel with a café operating for morning and lunchtime meals, 3 studio units and back packer rooms.

Similarly, Ross has seen the development of the Ross Beach Top 10 Holiday Park and significant money being spent by riders in other businesses in the town, including the hotel.

Trail Company Start-ups

Hokitika has two cycle trail companies, (Kiwi Journeys, Cycle Journeys) all with depots based in the main township. They employ a reasonable number of staff and operate a fleet of vans and trailers to transport riders and hire bikes. While all service Greymouth, one, Cycle Journeys, has also built a new depot in Greymouth and also services the Paparoa Track. Wilderness Sports (formerly Colls Sportsworld) has also established bike hire from their Greymouth shop.

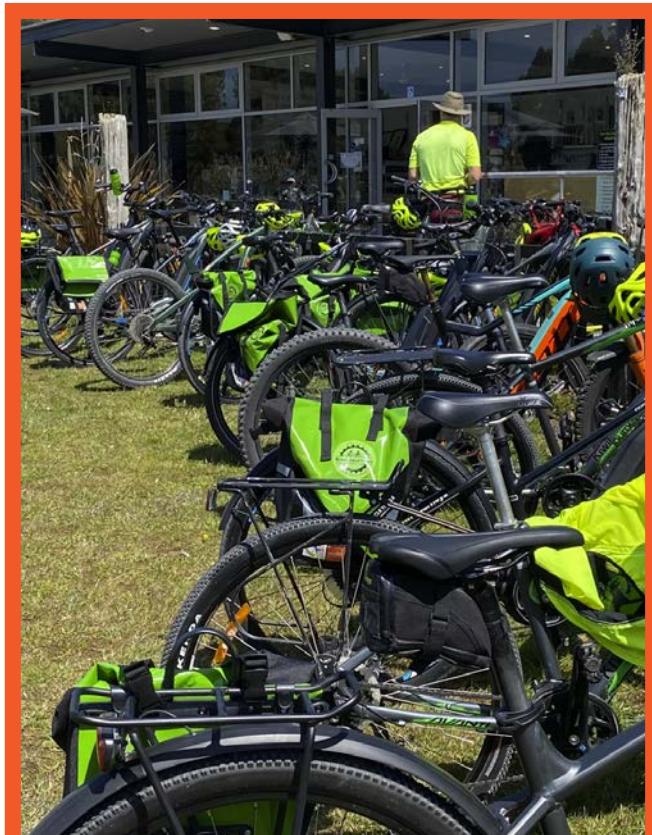
Supporting New and Existing Visitor Attractions, Hospitality and Retail

The West Coast Scenic Waterways is potentially the largest new attraction to start up solely as a result of the opportunities created by the trail outside hotels and accommodation. It provides accommodation, hot tubs, scenic cruises and, shortly, a food and coffee cart.

Visit the West Coast Treetop Walk & Tower Zipline, particularly around lunchtime, and the rows of bikes and financial benefit to this business are evident. Driving around Hokitika and Greymouth's CBD in summer and the vehicles with bikes on carriers are evident everywhere as riders purchase goods, services, petrol, grocery and other supplies, food and beverage and gifts from many of the retail outlets.

The benefits even extend to the Hokitika Airport, with riders often coming in and out via plane and using the services of the airport. In Greymouth, the TranzAlpine and accompanying services play a similar role in transporting riders to and from the Coast.

The Greymouth and Hokitika isites are kept busy with cycle enquiries and booking trips, while the Ross Goldfields Information and Heritage Centre is also frequented by cyclists.



Hokitika Scenic Tours is kept busy taking riders to visit attractions outside the trail. Explore West Coast operate a similar service in Greymouth.

Shantytown sees many cycling visitors and the Pounamu Pathway is likely to also be a popular experience for riders.

Monteiths in Greymouth and the Empire Hotel in Ross have become popular before and after watering holes especially for those riding the full trail, the former being a main pickup point.

Local Riders

Large numbers of locals use the trail for fitness, to walk their dogs, to get to town and even to school and back, especially at Kaniere. The trail can be viewed in the same way we use a gymnasium, swimming pool, netball court or sports field. These facilities all have capital, staffing and maintenance costs and are used by locals and visitors in the same way the trail is. The trail has added a new form of community recreation that is able to be enjoyed by virtually all in the community.



3. Rider Numbers and Demographics

Rider Numbers

While the question of how many people ride the trail appears to be simple it is actually quite hard to answer. People ride the trail in different ways. Some ride from start to finish. Others 'cherry pick' what they believe to be the highlights and some locals use the same section regularly.

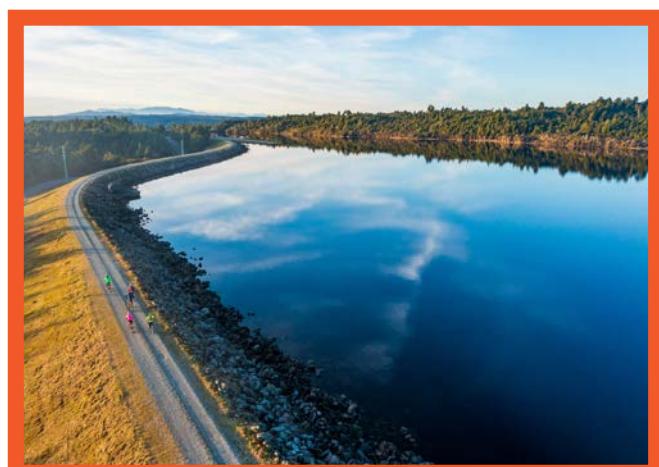
There are seven counters out on the trail. These are in the following sections: Karoro, Taramakau, the Kawhaka Pass, the Kaniere Water Race, the Kaniere Tram, Mahinapua and the Ross straight. All trail counters can vary in their percentage growth and decline in rider numbers depending on what is happening on the trail. As an example, sporting events or trail section closures, like that for the Totara Bridge, impacts use and counter data. Also too, are we talking about visitors or locals? Riders or walkers? The Karoro and Kaniere Tram sections, being by the largest towns, have lots of locals who walk, run or train on the trail regularly and are therefore the most popular. The table shows the counter data from each of the sites for the 2024-2025 season for the overall total movements, cyclists. It also contains the percentage change from the previous year. The recordings for the Ruatapu and Kawhaka counters are inaccurate. With the Totara Bridge closed few riders pass this point and the Kawhaka counter received water damage through the season.

The number of visitors who ride the entire trail is calculated off the counter on the Ruatapu/Ross straight. A deduction of 20% is made for local riders. This is the counter with the least riders past it as it is not a section people who 'cherry pick' necessarily ride. It is therefore our indicator of full trail usage. With the counter reading impacted by the Totara Bridge being closed and the Ruatapu one water damaged, estimates for this year can only be measured on the total change for the other counters. This reflects a 1% decrease. Trail numbers can

Site	10724 - 300625	10723 - 300624
Karoro	22568	-2.3 23128
Taramakau	9418	-2.1 9629
Kawhaka*	4051	-48 7791
Kaniere Water Race	12053	0.2 12040
Hokitika Kaniere	20610	2.8 20025
Mahinapua	13946	-3.6 14473
Ruatapu**	4189	-48.2 8082
	86835	95168

* Trail counter out with water damage

** Closed due to Totara Bridge closure



Estimated Total Rides

95,000



Estimated visiting riders per annum

15,000



Estimated riders of the full trail

6-7,000



Direct Economic Return per annum

\$18m



Economic Multiplier (MBIE)

3.55



Total economic return per annum

\$50m+

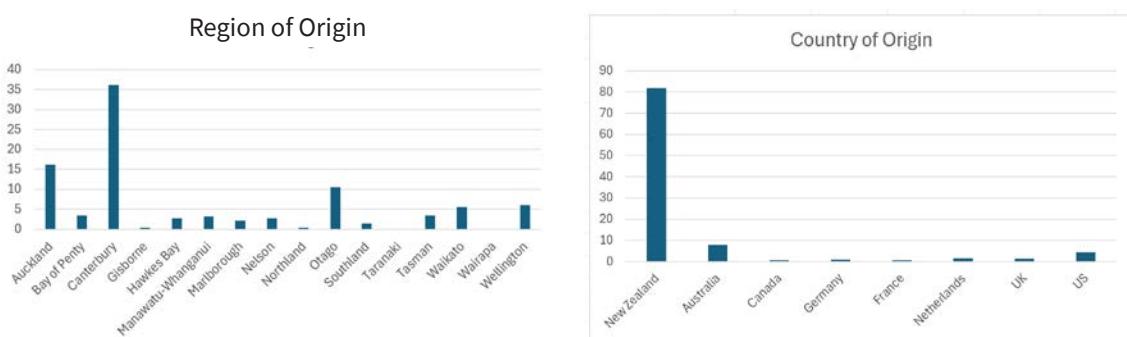
therefore be assumed to have remained similar to the previous year, the total riders around 95,000 and those riding the full trail estimated at 6,000.

To calculate the full number of visiting riders on the trail, MBIE commissioned research in 2020 that developed a detailed formula that involves taking the full number of trail riders, deducting the three remote counters and multiplying by the estimated percentage of visiting riders. Given this is unable to be applied this year, the number of visiting riders is estimated to remain around 15,000.

Rider Demographics

- The majority of riders continue to be in the 60-69 age group with around 80% above the age of 50.
- Females make up 56% of riders, males 44%
- Australia is the main international market.
- Canterbury and Auckland remain the main regions of origin for visiting riders.

Fifty-two percent of riders are now on E-bikes



4. Overall Trail Performance

The data below shows the West Coast Wilderness Trail scores matched against the average of all other trails. The trail is performing highly at nearly all the factors measured in the survey.

Factor	WCWT	AV All	
NPS	85	77	↑
Satisfaction	9.3	9	↑
Visiting for trail	75	75	↔
Nights on Trail	4	3.5	↑
Time Spend on Trail	4 days	1-4 hrs	↑
Bike Hire	4.8	4.6	↑
Bike Quality	4.7	4.6	↑
Bike Shuttle	4.8	4.7	↑
Guiding	4.6	4.3	↑
Toilets	4.1	4	↑
Accommodation	4.5	4.4	↑
Food and Beverage	4	4.1	↓
Other Activities	4.2	4.1	↑
Scenery	4.9	4.8	↑
Trail Difficulty	4.6	4.5	↑
Trail Gradient	4.5	4.5	↔
Signage	4.6	4.3	↑
Overall Trail Conditions	4.7	4.5	↑

5. Measures of Wellbeing

Wellbeing is also something that has been built into the trail surveys within the last two years. Information from riders shows the impact of riding the trail across many indicators. Of note are the impact on physical and mental wellbeing and appreciation of the environment with almost half of all riders surveyed indicated this has been improved.

West Coast Wilderness last 12 months	
Sample Size (n)	348
My physical fitness has improved	41.7%
I have developed or improved my skills	25.6%
My sense of wellbeing or mental health has improved	50.9%
I have learnt more about myself	0.9%
I have developed a closer relationship with the people I was with	35.3%
I understand more about the natural environment	28.7%
I understand more about the local culture and heritage	45.4%
I appreciate the natural environment more	54.9%
I appreciate the local culture and heritage more	41.1%
I am more conscious of my impact on the environment	18.4%
I'm more determined to protect the natural environment	3.4%
I'm more determined to protect our culture and heritage	1.1%
My confidence as a cyclist has increased	35.1%
I am more likely to cycle as an everyday form of transport	11.8%
I was affected in some other way (please specify)	0.3%
None of these	9.2%





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