

**GREAT SOUTH** 

Southland Regional Development Agency

# MURIHIKU SOUTHLAND Cycle Tourism Opportunity Assessment

Prepared by Destination Planning Ltd

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## ACRONYMS

ATMCT	Around the Mountains Cycle Trail
DOC	Department of Conservation
ES	Environment Southland
FTT	Fiordland Trails Trust
GDC	Gore District Council
GS	Great South
ICC	Invercargill City Council
IMBA	International Mountain Biking Association
L2L	Lake2Lake Trail
MBIE	Ministry of Business, Innovation and Employment (including Tourism)
NZCT	Ngā Haerenga New Zealand Cycle Trails Inc (Great Rides)
QLDC	Queenstown Lakes District Council
RTO	Regional Tourism Organisation
SDC	Southland District Council
SMBC	Southland Mountain Bike Club
TACI	Te Anau Cycling Inc
TNZ	Tourism New Zealand

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The Murihiku Southland Cycle Tourism Opportunity Assessment has been prepared for Great South by Destination Planning Ltd

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# Executive summary

**This cycle tourism opportunity assessment for Murihiku Southland presents the opportunity to develop and promote the region as a distinctive must-visit destination for cycling experiences. It has been developed by Destination Planning Ltd for Great South, Southland Regional Development Agency, following desktop research and a range of stakeholder engagements from late 2022 into 2023.**

The opportunity assessment looks at the current cycle tourism offering within Murihiku Southland, provides cycle tourism insights including economic impact data and provides a plan to support the development, management and promotion of cycle tourism in Murihiku Southland. It also outlines the benefits that can be optimised for the local community both directly through enhanced recreation and active transport opportunities and indirectly through visitor spend, job creation and the delivery of ecological restoration activity associated with trail projects.

While a broader Southland Cycling Strategy 2016 - 2026 was adopted for the region in 2018 covering all forms of cycling, including cycle tourism, this opportunity assessment focuses on cycle tourism where people visit specifically to do cycling activities; or they include cycling activities on a trip that has another main purpose.

Great South manages the Southland and Fjordland Regional Tourism Organisations which provide integrated tourism leadership for the region, particularly in the area of destination development. Great South can play a greater role in driving some of the actions outlined in the opportunity assessment, which directly aligns with the RTO mandate. However many of the proposed actions, such as trail development, will ultimately be delivered and managed by other entities and organisations, with investment decisions on the assets which this opportunity assessment recommends made from a much broader perspective including Waka Kotahi NZTA and local government investment for direct community use and benefit.

This opportunity assessment has been a direct output from the Murihiku Southland Destination Strategy 2023 – 2029, with promotion of cycling experiences a destination pillar and future focus of the region's destination strategy. The Cycle Tourism Insights New Zealand and Australian Market Summary (September 2021) estimated there are 1.8 million cycle tourists in Aotearoa New Zealand and 6.9 million in Australia. The average daily user spend on the Ngā Haerenga NZCT Great Rides is \$228, with Australians averaging \$272.

The additional value proposition for Murihiku Southland from cycle tourism includes:

- ➔ Further diversification of the economy, reducing risk from other sector downturns, with domestic cycle tourism actually increasing during Covid.
- ➔ Cycle tourism visitors spend more on average than the overall tourism market.
- ➔ It is an obvious form of slow tourism, encouraging visitors to spend more time and respect and engage with the local community.
- ➔ Cycle tourism supports a low emissions future.
- ➔ It enables creation of higher value, export-ready tourism experiences and businesses.
- ➔ Cycle tourism experiences can perfectly integrate with Murihiku Southland's other key pillars, including food, dark skies, agritourism, heritage and arts.
- ➔ Investment in cycle tourism facilities that are also available to local residents and the facilities create extra opportunities to run events and help attract new residents to live, work, invest and study.
- ➔ Cycling supports physical and mental health for residents and visitors, resulting in increased wellbeing.
- ➔ Although it peaks in summer, cycle tourism is a year-round business which helps the tourism economy to become sustainable, both in terms of business yield and sustaining full-time jobs, as well as avoiding peak tourism pressure on sites and infrastructure.
- ➔ The growing market of retirees with e-bikes can travel outside weekends and holiday periods.
- ➔ Cycle trails literally disperse visitors, and their spend, to places that would otherwise not benefit.
- ➔ Trail projects engage local communities and visitors to create and work together on associated ecological restoration initiatives.

Although Murihiku Southland has an improving set of cycle trails, mountain bike parks and other facilities, it needs to develop further to both compete with and complement other regions like Central Otago and Queenstown Lakes.

This cycle tourism opportunity assessment sets a vision and five goals for the future.

## VISION

**Murihiku Southland is recognised as a must-visit cycling destination with a comprehensive regional network of trails and mountain bike parks that connect our communities and visitors, broaden the economy, showcase the most diverse range of landscapes in Aotearoa New Zealand, and support ecological restoration and a net zero carbon future.**

To help achieve this vision and encourage visitors to choose Murihiku Southland as a cycling destination five goals have been identified, each with detailed actions that sit under them. These actions include the development of a comprehensive trail network within Murihiku Southland and connecting with our neighbouring regions, developing nationally significant mountain bike parks, and strengthening the regional position by improving cycling content and targeting audiences through defined channels. Further actions include alignment with strategic and statutory plans along with advocacy and partnership with key stakeholders to enable appropriate trail developments.

### GOAL 1

Develop a comprehensive regional network of cycling trails and facilities to make Murihiku Southland a must-visit cycling destination.

### GOAL 2

Support the industry and councils to develop best practice support services and facilities that provide exceptional cycle tourism experiences.

### GOAL 3

Position Murihiku Southland as a distinctive cycling destination supported by the most diverse range of landscapes in Aotearoa New Zealand.

### GOAL 4

Promote Murihiku Southland cycle tourism to target market segments using local experts and specialist channels.

### GOAL 5

Encourage collaborative partnerships between councils, stakeholders, community groups and organisations that are delivering the vision of a comprehensive regional trails network.



PART ONE:  
**Cycle Tourism  
Assessment**



# Developing the opportunity assessment

## Opportunity

Murihiku Southland is fortunate to have an abundance of both cycling and walking trails. The region is already a destination of choice for walking, with five Great Walks as well as many short walks, day walks and multi-day options.

The opportunity was recognised by Great South that Murihiku Southland has the potential to be a key destination for cycling by:

- ➔ Positioning and promoting Murihiku Southland as a key cycle tourism destination, focusing on the region's key points of difference.
- ➔ Supporting and encouraging new developments that have the highest potential to attract cycle tourists to the region.
- ➔ Utilising cycling-focused events and infrastructure to support the regional story and increase visitor length of stay.

### The cycle tourism opportunity assessment has been developed within three areas:

1. Assessment of the current cycle tourism offering in Murihiku Southland with an external lens.
2. Cycle tourism insights and data on the proposition for the region.
3. Recommendations and a potential pathway forward for the development of cycle tourism within Murihiku Southland.

## Process

The process to develop this cycle tourism opportunity assessment included discussions with over 70 stakeholders and subject experts, face-to-face where possible, otherwise online or over the phone.

This included representatives from the four local councils along with Papatipu Rūnaka, DOC, Fish and Game, Active Southland, charitable grant organisations, Milford Opportunities Project, Community Board Chairs, various cycling sector organisations, local trail trusts and a range of tourism operators relevant to cycle tourism.

Out-of-region interviewees included trail trusts and trail developers from neighbouring regions, Ngā Haerenga NZCT, Waka Kotahi NZTA and New Zealand Trails App.

These discussions were complemented with desktop research and the assessment was timed to enable access to the recent research carried out by Angus & Associates for Fiordland Trails Trust, providing the most up-to-date data on trail use, satisfaction and economic impact.

Destination Planning Ltd also drew on its own work on cycle trails and tourism strategies in other Aotearoa New Zealand regions.



# Background

## Overall international tourism market trends

**As of mid-2023, travel has generally rebounded to, or above, pre-Covid levels in Europe and North America. The southern European 2023 summer season is set to reach record levels after pent-up demand post-Covid, which will result in a return to over-tourism issues in some destinations. This should result in visitors looking further afield to destinations that are less crowded, like Aotearoa New Zealand over the next few years.**

The Asia Pacific rebound is lagging North America and Europe, partly due to China maintaining lockdowns much later than most other countries and taking longer for their economy to rebound. However, most markets are in the vicinity of 70-80% of pre-Covid levels with the main constraint being reinstatement of sufficient flight capacity.

Most forecasts showed that pre-Covid visitor levels for Aotearoa New Zealand would not be reached until at least 2025 however there are already strong signals that the 2023-24 summer season is when Aotearoa New Zealand is likely to reach pre-Covid visitor numbers.

Visitor demand is shifting from 'ticking off sights' to more meaningful tourism experiences, allowing the visitor more engagement with local culture and community with cycle tourism packages delivering on this demand.

Digital information channels, peer recommendations, reviews and social media are continuing to grow in importance for visitor decision making. Artificial Intelligence (AI) is already being used by online travel agents like Trip.com and Expedia to handle complex travel queries and it will be critical that comprehensive and accurate information is provided in a format that AI supported search engines and booking channels will find easily.

Visitors are increasingly interested in being responsible travellers, lowering their carbon emissions and other environmental and social impacts. Cycle tourism offers an obvious slow tourism, low emissions option while well designed cycle tourism packages can incorporate community engagement and give-back programmes to support, for example, ecological restoration projects.

The cycle tourism market can be segmented in several ways but there are two main groups:

### ① Destination Cyclists

Those whose primary trip purpose is for a cycling experience. Many will have their own bikes, but some will hire them. This group includes people visiting destinations for cycling events.

### ② Visitors Who Bike

Those whose primary trip purpose is something else, but they are interested in cycling experiences while visiting. An increasing number of self-drivers and motorhomers now carry bikes on their vehicles.



## International cycle and mountain bike market

**The key international cycling markets for Aotearoa New Zealand are Australia, UK, and USA, followed by Germany.**

Australia (particularly the eastern states) is the primary international market opportunity, with growing awareness of Aotearoa New Zealand's offering, relatively easy access and market scale, compared with other nationalities. This has been the focus of Tourism New Zealand cycling and mountain bike marketing efforts.

As some of the Asian markets mature in terms of travel preferences, they will also increasingly take up more experiential travel including cycle tourism. Aotearoa New Zealand needs to prepare for this over the next 5-10 years. As an example, China saw growth in domestic camping during the Covid-19 pandemic and this is expected to be reflected in their travel patterns, along with choosing more active and adventurous trip experiences such as cycling.

Sustainable tourism strategies are increasingly calling for Aotearoa New Zealand to focus on short to

medium-haul markets to reduce total carbon emissions from visitor trips. This suggests continued focus on Australia, increased emphasis on Asia/Pacific and to a lesser degree, South America and North America.

Regardless of where Aotearoa New Zealand focuses its international marketing efforts, we will still see strong visitation from UK and Europe which have some of the most mature cycle tourism markets. Like Aotearoa New Zealand, Europe saw spectacular cycle tourism growth during Covid, which is still continuing. According to Tourism Review, in Germany, more than 3.9 million people cycled through the country in 2021 (500,000 more than 2020). In the same year, 3 million cycled through the Netherlands (up by 500,000), while the number of cyclists passing through France cycle routes has continued to rise since 2016, stabilising in 2021 after a 28% jump between 2019 and 2020.

If Aotearoa New Zealand continues to develop quality cycling trails and experiences we can attract a share of this market.

The Cycle Tourism Insights New Zealand and Australian Market Summary - September 2021 completed by Angus & Associates showed that:



35% of the adult Australian population are in the cycle tourism market

Of these, three in five find Aotearoa New Zealand highly appealing and two in five said they were likely to travel here for leisure in the next three years



Compared with New Zealanders, Australians are higher spenders and are more likely to want to travel in comfort and indulge, including using hotels

## Segments by type of riding and equipment

International visitors span all cycling segments, however these segments all vary in their maturity regarding cycle experience demands.

### EASY GREAT RIDE AND TRAIL RIDERS (INCLUDING E-BIKES)

This segment mainly ride grade 1 and 2 cycle trails using mostly comfort bikes with more upright stance, softer seats and smoother tyres than mountain bikes. The pace is generally relaxed and boutique accommodation, attractions, food and beverage, combined with the social dynamic of riding in a group, are key motivators as much, if not more than, the trail riding itself.

E-bikes have recently transformed this market, enabling older and less-fit people to accomplish significant rides,

undeterred by headwinds and hill climbs. In this segment, the e-bikes tend to be designed for relatively flat and smooth trails with front, but usually not rear, suspension (hard tail). These bikes tend to cost \$2800-\$6000.

The largest group is aged from 55 into their 70s, but all age ranges use these trails including beginners and families.

### SINGLETRACK MOUNTAIN BIKERS

This segment normally seek out grade 3-5 trails and tend not to be interested in easy trails unless they are riding with less experienced friends or family, or as part of a bigger adventure.

The traditional two specialised disciplines of cross country (with lots of climbing) and downhill have also hybridised into all mountain and enduro mountain bike riding, with a

more balanced level of climbing and descent, and bikes that perform well across a range of riding styles. Trail parks with uplift enable riders to focus on the more enjoyable descent trails by removing the uphill pedaling. Examples include shuttle bus operations (e.g. Whakarewarewa, Rotorua) and lift-accessed trails (e.g. Queenstown Gondola and Christchurch Adventure Park's chairlift).

This market is attracted to two key types of trail facilities:

1. The more adventurous NZCT Great Rides like the Old Ghost Road, Paparoa Track and Queen Charlotte Track.
2. Dedicated mountain bike parks with a network of over 25km of trails of all grades, potentially with paid uplift using shuttles, chairlifts or gondolas. These facilities range from the likes of Motupōhue Bluff Hill trails to Christchurch Adventure Park which has paid access like a ski resort, a chairlift, dedicated hire and accessories shop, café and mountain bike school.

In the latter part of the 2010s, more commercial trail parks evolved, which operate more like ski areas. These include Fourforty southeast of Auckland, Dirt Farm and Rivenrock in the Wellington region, and Glendhu Bike Park in Wānaka. Cardrona Ski area now operates summer mountain bike and buggy trails, while Christchurch Adventure Park was developed specifically for mountain biking by Canadian-based company Select Group.

In Murihiku Southland, Motupōhue Bluff Hill and Welcome Rock are the main offerings for this market, supported by Sandy Point, Perenuka and Hokonui Hills trails. The Motupōhue Bluff Hill development underway and the planned Waikaia Forest Trails will attract more of this segment to the region.



### E-MOUNTAIN BIKERS

The advent of e-bikes was initially looked down upon by mountain bikers as a form of cheating and negating the exercise benefit of mountain biking, as well as compromised performance on descents due to extra weight and balance issues.

However, as e-bikes have evolved, there is now a growing market of serious full-suspension e-mountain bike riders on bikes that range from \$7,000 to \$25,000. These riders simply cover more km per ride and can do extra uphill laps within a riding session. Because of the additional uphill speed and technical climbing ability, trail design is being adjusted to provide extra challenge and passing areas are being added to enable e-mountain bikers to overtake normal mountain bikers.

E-mountain bikes will also bring into question the value of, and business case for investment, in paid uplift for some mountain bikers.

One implication of e-bikes in general is a big increase in people who may not have been on a bike for decades,

suddenly rediscovering biking but potentially over estimating their technical skills. The extra weight of e-bikes and speed has resulted in an increase in accidents. This has been exacerbated by trails being under-graded (i.e. they are more challenging than they appear from the promotional and grading information).

### CYCLE TOURING

Cycle touring has been around since the advent of the bicycle. These visitors take a long holiday touring large parts of Aotearoa New Zealand, mostly on-road. As the NZCT Great Rides trail network has expanded, cycle tourers use the easier grade trails to link up road sections of their itinerary. This market is small but still growing and morphing into the bikepacking segment.

Cycle tourers tend to be highly self-sufficient campers with large panniers for equipment and therefore have low average spend per day, although they do take a break in commercial accommodation from time-to-time. Several tour companies

operate for this market in Aotearoa New Zealand, and globally, where the luggage is carried in a support van and customers can choose which sections to ride and when to take a break in the van. These organised tours spend more, using commercial accommodation and cafes.

### ROAD CYCLING (ROADIES)

Road cycling enthusiasts cross over with cycle tourers (some will tour on road bikes) but there is a segment that follows, supports or competes in iconic road cycling competitions such as the SBS Bank Tour of Southland.

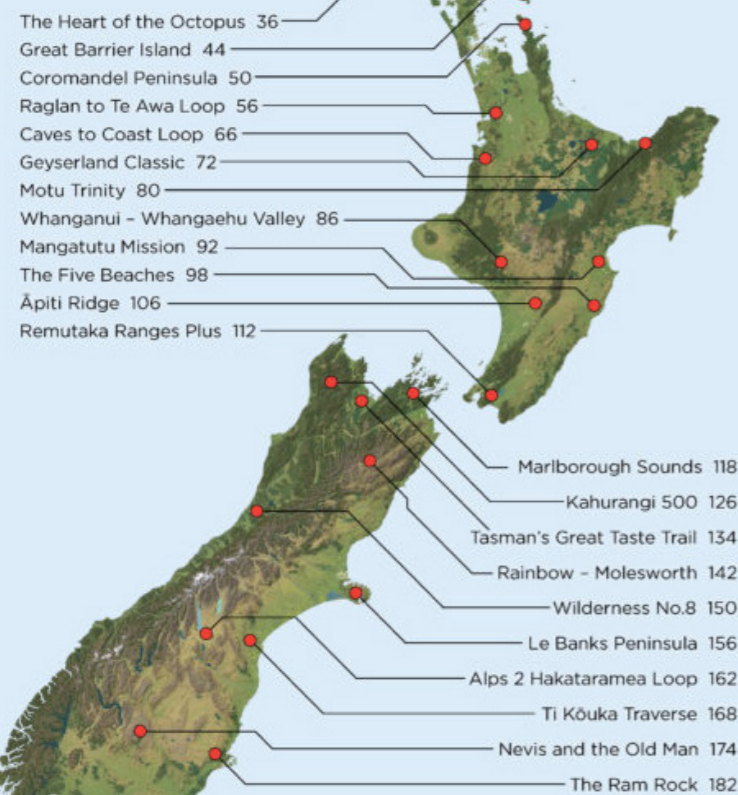
The Tour de France provides pre-rides of sections of the main event route for this segment, then the participants also spectate at the main race. This occurs to some degree around the SBS Bank Tour of Southland, but there is potential to develop this visitor market further, both as part of the event, but also by packaging and publishing the event route as experiences that roadies can do any time.





## BIKEPACKING AOTEAROA

*The Kennett Brothers*



### BIKEPACKING AND GRAVEL BIKES

Bikepacking is described as the synthesis of mountain biking and minimalist camping, combining the freedom of multi-day backcountry hiking, with the range and thrill of riding a mountain bike. In an Aotearoa New Zealand context, bikepackers are like trampers on bikes getting into the back country. Like other cycling trends, Aotearoa New Zealand has followed North America on this with a roughly 5-year lag. Sealed roads are only used when absolutely necessary to get to the next section

of gravel road or off-road trail. Only essential lightweight gear is carried in specialised small clip-on bags. The set-up usually excludes traditional panniers on the sides of the bike which streamlines the bike set-up on narrow paths and negotiating pinch gates, styles or fences. Bikepacking often involves much shorter trips than cycle touring but into more remote places. This market spans a wide age range from 18-60 and like cycle tourists, they may take a break in more traditional accommodation.

Both cycle tourists and bikepackers will potentially use the national

network of Heartland Rides and the "cycle touring/bikepacking routes" which have been established. These are backroad routes to join up the NZCT Great Rides while avoiding main highway traffic as much as possible.

The Kennett Brothers' Tour Aotearoa event is the pinnacle event and showcase for bikepacking. They have since added shorter events, The Sounds to Sounds and Kōpiko Aotearoa from the East Coast to Taranaki. Their Bikepacking Aotearoa book with 22 routes does not include Murihiku Southland other than part of their 'Nevis and the Old Man' option, but they do briefly cover a wider selection of routes.

Alongside their books covering a suite of other routes throughout Aotearoa New Zealand, there has been an explosion in online content and specialist media channels about bikepacking. There is a strong online community sharing tips on equipment to use and routes to ride, making targeting this segment relatively easy for someone with appropriate knowledge.

A local example of a gravel bike event is the Tuatara 1000, traversing Murihiku Southland and southern Otago, between Te Anau and Dunedin, around the southern coast. There are opportunities to grow this event and create new ones. Unless special one-off access needs to be arranged, these routes could also be promoted to ride at leisure, taking visitors to 'out of the way' parts of the region.

An opportunity exists to work with the local bikepacking community to identify a selection of routes to showcase Murihiku Southland's backroads but still offer a connection to key attractions. A route through the gravel roads in Hokonui Hills but taking in Mandeville is one example. While the spend per day may be lower than other cycle tourists on average, many will stay longer, or they may repeat visit. Also, in terms of lifetime value, these visitors have strong potential to be attracted to live, work or invest in Murihiku Southland.

### CYCLOCROSS (CX) COMPETITION GROWTH

Related to the bikepacking and gravel bike movement, Cyclocross is a form of bicycle racing that typically takes place in the autumn and winter. It involves lots of laps of a short course featuring pavement, wooded trails, grass, steep hills and obstacles requiring the rider to quickly dismount, carry the bike while navigating the obstruction and remount. It is actually based on events from the early 1900s in Europe but has experienced a renaissance alongside gravel bikes.

The Southland Mountain Bike Club is running CX events at Sandy Point and sees potential for growth in local participation and in larger events attracting visitors.

### SELF-DRIVING CASUAL CYCLISTS

While a lot of cycle tourism focus goes on organised tours on multi-day trails, there is a big increase in self-driving visitors carrying bikes on their cars or campervans. These people will also do multi-day rides, but equally

they look for short rides in all of the stop-off destinations along their itinerary. This could be a full day ride, half day, or even just a quick one-hour ride, fitting around other activities. This is where easy to find and follow trails in centres such as Waihōpai Invercargill, Māruawai Gore, Riverton and Te Anau will be an important part of building Murihiku Southland cycle tourism offerings.

This is how most of the gravity mountain bike segment operates, except where there is a major mountain bike hub with comprehensive hire equipment.

### TARGETED EVENTS AND PROGRAMMES FOR WOMEN

As with many adventure sports like surfing, there is ongoing growth in events, riding programmes and recreational riding groups specifically for women. This is similar to the concept of wellness retreats but with the focus on biking. In fact, many such biking experiences may combine a wellness component.



## Cycling segments do not fit neatly in one demographic.

Diversity across all of the mentioned cycling market segments can be illustrated by the visitors hosted at the Timber Trail Lodge (central North Island) in their first month of operation.

This trail is a grade 2-3 but is seen as reasonably adventurous because of the spectacular forest, high swing bridges, and its remoteness.

Visitors included:

- Kiwi families, with kids as young as 10.
- Groups of women, getting away from it all with their friends.
- Groups of mountain biker blokes.
- A group of older people (some who didn't bike) who based themselves at the lodge, did a bit of biking, a bit of walking and lots of tea drinking.
- Overseas visitors touring the country by bike or adding cycling to their itineraries.
- Aussies spending 10 days in the central North Island doing various mountain bike rides.
- Couples enjoying quality time together.
- Diverse groups of friends.
- Business groups (e.g. a group of 23 work colleagues aged between 30s-60s).

## How market segments are shaping design

### PUMP TRACKS EVOLVING TO ENABLE BROADER USER GROUPS

Early version pump tracks tended to resemble a mini BMX track made from dirt/gravel and Murihiku Southland has a few of these. Contemporary urban bike parks use tarmac surfacing which costs more but has the advantages of minimal maintenance, all weather useability and extending user groups to skateboard, scooter and rollerblade.

Bike park designs are becoming more creative to make one park work simultaneously for users of varying skill levels. Lismore Park in Wānaka is just one example showing two levels of pump track plus layered loops of gravity trail with jumps resulting in a family friendly park offering something

right through to relatively extreme jump experts (see image below).

There has also been development in terms of the materials used with prefabricated clip-together relocatable pump tracks (currently being trialed throughout Murihiku Southland) and special surfaces that enable combining a pump track with skate bowl, quarter-pipe, half-pipe and street features.

As Murihiku Southland's individual towns develop bike parks and pump tracks as part of their youth engagement strategies, there is an opportunity to ensure each one is distinctive and unique. This will encourage Southlanders to visit other towns to try them out and visitors, if the facilities are well promoted, may be encouraged to visit a few towns to try them out. However, discovering a quality bike park in a location they

were visiting anyway, can create a nice surprise, greater satisfaction and social mentions.

### ADAPTIVE MOUNTAIN BIKE FRIENDLY TRAILS

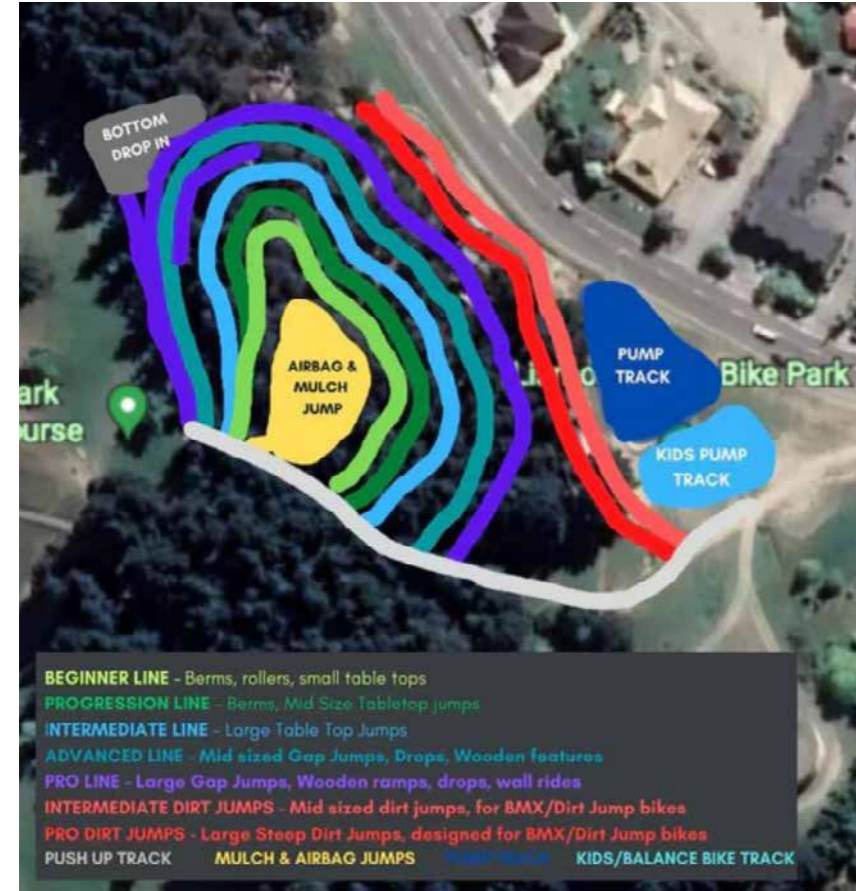
Options of bike-alternatives for people with disabilities are increasing. These include specialist tricycles and quadricycles. This means that not only are wider trails important for attracting families with buggies, and mobility scooters, but some of the more adventurous gravity trails are also being built wider so people with disabilities can engage in proper mountain biking action.

### ONE-WAY AND SEPARATED USER TRAILS

As trails become busier, there is an increase in separating user types to avoid potential conflict and increase safety. This might start from a full shared-use trail, to a trail that is bike uphill only but walking both directions, to building completely separate walking and biking trails within a trail park. Most descending trails of grade 3 and above will be one-way as they are designed to descend fast. This trail designation can occur progressively as a trail park builds in popularity.

### FLOW AND "AIRFLOW" TRAILS

Flow trails are designed to be descended without having to necessarily pedal. Airflow trails create a combination of a jump and flow trail with options to bypass (or just roll over) the jumps for those not interested in leaving the ground. This means a single trail can appeal to a wider audience and riders of different abilities can ride a trail together with both being satisfied.



## Value proposition for cycle trails and bike parks

### This section focuses on the economic impact of cycle trails and bike parks but also introduces other benefits.

While it is not currently possible to provide robust figures for cycle tourism economic impact across the region, there are economic impact examples of individual trails in Murihiku Southland, and nationally, which support cycle tourism investment.

Notwithstanding the economic impact, there is wide-ranging value from investment in cycle trails, such as health and wellbeing, community and social benefits.

These include:

- ⊕ Attracting the type of visitor who is more likely to engage positively with the local community.
- ⊕ Encouraging visitor dispersal throughout the region as trails weave their way through less populated areas of the region.
- ⊕ Attracting visitors outside of peak visitor season by encouraging shoulder season visitation.
- ⊕ A more sustainable and low-emission way to travel the region.
- ⊕ Improving public access to places of cultural, scenic or recreational interest.
- ⊕ Improving active transport options and safety.

- ⊕ Improving physical and mental health of the community with associated long-term reductions in health system costs.
- ⊕ Giving youth healthy active choices.
- ⊕ Creating community cohesion as people get involved and work together on major trail projects for their town.
- ⊕ Creating a platform for ecological restoration including fencing, planting and pest control associated with a trail project.
- ⊕ New business opportunities, product development and job creation to service the increasing cycle tourism market.

## SPORT NEW ZEALAND ACTIVE NZ SURVEY 2021, CYCLING AND MOUNTAIN BIKING PARTICIPATION

The most recent Sport New Zealand Active NZ survey carried out in 2021 showed that 11% of the adult (over 18) population participate in cycling. This is the sixth most popular activity after Walking, Individual Workouts, Gardening, Running and Playing Games. In the 35 - 49 age group this increases to 15%, while 50 - 64 is 14%. The skew is towards male at 15% vs female at 8%. Māori participation is only slightly lower than the average at 9%. In young people (under 18) cycling has much higher participation at 32% and is the fifth most popular activity.

The survey also highlighted tramping/bushwalks had much lower participation amongst young people (11%) and adults (5%). This is important when considering opposition to trails allowing cycling access.

Mountain biking as a subset of the cycling activity category is 5% of the youth population and around 4% of adults. An average of 4.7% of people across New Zealand go mountain biking at least weekly.

### Adult participation in cycling in the last 12 months (2021):

**34%** participated in cycling/BMX (including e-bikes) ↑ 30% in 2019

**29%** participated in cycling/BMX (excluding e-bikes) ↑ 28% in 2019

**21%** participated in road biking (not on an e-bike) ↑ 20% in 2019

**15%** participated in mountain biking (not on an e-bike) ↑ 14% in 2019

**9%** rode an e-bike ↑ 5% in 2019

## FIORDLAND TRAILS TRUST LAKE2LAKE TRAIL IMPACT ASSESSMENT

Great South, along with Southland District Council, supported Fiordland Trails Trust to conduct research with Angus & Associates on the benefits and economic impact of the Lake2Lake Trail year ending March 2023, as well as assessing support for a selection of new trail options.

The research showed more than 5,100 visitors to Fiordland can be attributed to the Lake2Lake Trail. Collectively, these visitors stayed more than 10,000 nights in the area.

**82%** of users rate their trail experience either...



15% of the trail users travelled to Fiordland only/mainly to experience the Lake2Lake Trail. A further 16% were visiting for other reasons but extended their stay to experience the trail.

Combining visitor expenditure, event-related expenditure and trail expenditure shows a total estimated economic impact of the trail in year ended March 2023 was \$3.025m. Direct economic contribution accruing as a result of visitor expenditure in Fiordland was almost \$1.8m.

Events held on the trail, including Meridian Hydro Half Marathon, Mitre 10 Te Anau 10k and Spring Challenge, contributed \$981,118 to the local economy.

There has also been a positive contribution to employment in Fiordland with 16 direct and 10 indirect jobs identified.

You can access the full Lake2Lake Trail Impact Assessment on the Fiordland Trails Trust website.

## CYCLE TOURISM INSIGHTS NEW ZEALAND AND AUSTRALIAN MARKET SUMMARY 2021

Angus & Associates completed an independent insights-driven analysis of trends and opportunities to further develop cycle tourism and increase its value to communities across Aotearoa New Zealand.

The report was informed by analysis of existing secondary information about cycle tourism, consultation with industry stakeholders and a consumer survey of the cycle tourism market in Aotearoa New Zealand and Australia.

It found the average daily expenditure for NZCT Great Rides users was \$228 per person and the average total trip spend was \$697 per person.

Users with above average expenditure include users from Auckland, users aged 60+, users who said the trail was the main reason for their trip, and multi-day users.

**43%** of New Zealanders are planning to undertake a cycle tourism activity in the next year

**40%** of Australians are planning to undertake a cycle tourism activity in the next year

Of those who are not planning to participate in cycle tourism next year:

**58%** of New Zealanders are interested in doing a cycle tourism activity within the next three years

**52%** of Australians are interested in doing a cycle tourism activity within the next three years

The ideal cycle trail experience for New Zealanders would last less than a day. While the ideal cycle trail experience for a fifth of Australians would last three or more days with a third wanting full support on their experience where all logistics are taken care of, including a guide.

You can access the full Cycle Tourism Insights New Zealand and Australian Market Summary September 2021 on the MBIE website.

## NGĀ HAERENGA GREAT RIDES OF NEW ZEALAND EVALUATION 2021

Angus & Associates completed this evaluation as part of the monitoring of the performance of the NZCT Great Rides network. It details how the Great Rides are impacting trail users, the communities in which the trails are located and Aotearoa New Zealand as a whole.

The findings of the evaluation provide compelling evidence that NZCT Great

Rides are having a positive impact on Aotearoa New Zealand (see below for evaluation key findings).

The evaluation also included a survey with representatives of local Chamber of Commercences, other local business groups, territorial authorities, economic development agencies and regional tourism organisations. They were asked to comment on the extent of which their local NZCT Great Ride has been a factor in drawing people to their region to live, work, study and play.

- 47% said it was a factor in attracting people to live in the area
- 62% said it was a factor in attracting people to do business or invest in the area
- 8% said it was a factor in attracting people to study in the area
- 91% said it was a factor in attracting visitors to the area

You can access the full Ngā Haerenga Great Rides of New Zealand 2021 Evaluation on the MBIE website.

## NGĀ HAERENGA NZCT GREAT RIDES COST BENEFIT ANALYSIS 2016

In 2016 MBIE commissioned a Cost Benefit Analysis (CBA) by Dr Antong Victorio on the Ngā Haerenga NZCT Great Rides. This CBA estimated that Around the Mountains Cycle Trail generated \$647,000 revenue from domestic users and \$372,000 from internationals, totalling \$1,019,000. This was based on \$280 spend per day by international visitors and \$98.52 by domestic users. However this analysis did not apportion the spend between Queenstown and Murihiku Southland.

In the same study, looking across all NZCT Great Rides, for every \$1 spent it was estimated that there was an annual benefit generated of approximately 3.5 times that.

You can access the full Ngā Haerenga Great Rides of New Zealand Cost Benefits Analysis on the MBIE website.

### NZCT Great Rides evaluation key findings:



From 1 July 2020 to 30 June 2021, about **2.19 million trips** were taken across the NZCT Great Rides network



An estimated direct economic contribution of **more than \$950m** was brought to regions by the users

**98%** of users were domestic

Note the period of evaluation was during Covid-19 lockdown

Users received benefits of an improved sense of wellbeing and mental health, increased physical fitness, and a greater appreciation of the natural environment



**27%** of the adult population of Aotearoa New Zealand participated in a cycle tourism activity between 1 July 2020 and 30 June 2021



## TOURISM NEW ZEALAND RESEARCH

Tourism New Zealand special interest research using data from the International Visitor Survey shows that cycle tourists spend more on average than the overall tourism market. Examples outside the region provide more insights into the benefits Murihiku Southland will receive if it strategically invests in its cycle trails offering.

The Lake Dunstan Trail is the recent stand-out example of demand that exists for scenically spectacular trails, that are constructed to a high quality, supported by hire and tour businesses, are accessible to local residents and close to tourism flows.

The 2018 Lake Dunstan Trail feasibility study projected 7,000 users in year one and 13,515 users by year ten. When the trail opened in May 2021 the actual ride counts were 84,000 in year one and 136,813 in the 23 months to 31 March 2023.

The higher numbers in year one was likely influenced by having closed borders, creating high domestic demand and it coincided with a big uptrend in e-bike users. The novelty factor of a new trail and the spectacular imagery in media

coverage also created a must-do sentiment in the market. For the month of March in 2023 there were 8,521 counts, which well exceeded the year-one feasibility estimate.

Many riders have been attracted by this trail and added on nearby trails extending the length of their stay. The Lake Dunstan Trail has also generated vast media coverage boosting awareness and aspiration to visit the wider Central Otago region.

## QUEENSTOWN ECONOMIC IMPACT ASSESSMENT 2016

TRC Tourism completed an economic impact assessment of mountain biking in Queenstown in 2016, which estimated more than 56,000 mountain bikers used the trail network around Queenstown with a strong preference for intermediate grade single track trails. Those mountain biking respondents were generally aged between 30 and 50 and came from a high-income bracket.

Total annual spending in Queenstown by those visitors was calculated to be in excess of \$64m for 2016. Mountain biking trails and riders have definitely increased in Queenstown since this study, with potential for some of this market to be attracted to Murihiku Southland with the right quality trail offering.

## ROTORUA ECONOMIC REPORT 2022

A RotoruaNZ commissioned report from economist Benje Patterson in August 2022 (using 2021 data) shows a total contribution of \$139.8m from mountain biking to the local economy. This was made up of \$103.4m spent in Rotorua in 2021 by visitors who came for the sole purpose of mountain biking. Other visitors who mountain biked while staying in Rotorua for other reasons spent a further \$36.4m. Under various assumptions, a plausible growth scenario for 2026 was assessed at \$213m in spend.

Approximately 1,153 jobs in 2021 could have been supported by mountain bike visitors' spending; and of these jobs, 853 were supported by people whose primary purpose of visiting was to go mountain biking.

It is estimated that some 148,597 visitors mountain biked, with 116,366 being overnight visitors and 32,231 being day trippers.

There are several mountain bike trail areas around Rotorua, with the main ones in Whakarewarewa Forest, where counter data suggests that about 97,248 individual mountain bikers used the trails in the June 2021 year, with 3,641 being local bikers and the remaining 93,607 being visitors.

Average stay length by mountain bike visitors was 4.1 nights vs 2.6 for other visitors and average spend per day by mountain bikers was \$281 vs \$135 by other visitors.

A further indicator of the relative importance of these mountain bike trails within Rotorua's tourism offering is the opening of Aotearoa New Zealand's newest i-SITE Visitor Information Centre at the Waipa trails hub. This is well outside the main centre of Rotorua where trail users are the main customer group. Within Rotorua's three i-SITES, the second one is also at a trail hub on the other side of Whakarewarewa Forest at the Redwoods.



## ALPS 2 OCEAN CYCLE TRAIL VISITOR SURVEY 2020

Lincoln University completed a cycle trail visitor survey in 2020 on the Alps 2 Ocean (A2O). It found that the A2O was a strong attraction to cyclists, the large majority of whom (56%) would not have visited the districts in the absence of the trail (58% were New Zealanders).

The cyclists also made substantial expenditure associated with their ride with A2O annual associated spending about \$27m.

The ongoing Evaluation of Ngā Haerenga Great Rides of New Zealand

carried out across all NZCT Great Rides showed the A2O cycle trail led the way with an annual economic contribution of \$1,909.20 per person, which was double that of the \$957.50 average calculated for all NZCT Great Rides.

The contribution per person per night for the A2O was \$299.60, compared to an average for all trails per person per night of \$238.40.

## INTERNATIONAL EXAMPLES

### Chattanooga, Tennessee, USA

The 2022 Chattanooga Mountain Biking Impact Report on mountain biking in the Hamilton County region found that its 85.5 miles of trail attracts 44,089 annual visits, including 16,910 from tourists outside of the county.

Accounting for group size and trips per year, mountain bikers contribute \$6,892,502 to the local economy. These expenditures generate \$482,999 in county and state taxes, and \$498,225 in federal taxes. Group size averages 2.75, and they stay 3.8 nights, spending roughly \$342.33 per individual per trip.

65% of trail visitors were Hamilton County residents, 80% were male with an average age of 39.5 and average annual salary of US\$80-\$100k a year.

This impact is expected to increase again when a major new trail system, Walden's Ridge Park, opens in 2023.

### UK Cycle Tourism

Singletrack Magazine reported that cycle tourism spending from cyclists in the UK generates £520m per year. There are 1.23 million overnight trips each year, contributing £433m to the economy.

A survey of riders of King Alfred's Way, a route starting in Winchester which Cycling UK launched in 2020, shows on average, every cyclist spends £83.60 per day on food and accommodation.





# Murihiku Southland current cycle tourism landscape

## Regional progress to date

### PRE-2016

Prior to the establishment of the first section of Around the Mountains Cycle trail (Kingston to Mossburn) in 2014, Murihiku Southland's cycling reputation mainly hinged around road riding, particularly the SBS Bank Tour of Southland and from 2006, Waihōpai Invercargill's indoor velodrome track cycling facility.

The Southland Mountain Bike Club was well established from the early days of mountain biking, hosting competitive events at Sandy Point and Motupōhue Bluff Hill, including nationals events. Hokonui Bikers Club had started developing the Water Race track and the small private Perenuka Mountain Bike Park opened near Te Anau, with a few very adventurous mountain bikers riding routes such as Percy's Pass.

A few tour companies offered on-road cycle touring itineraries that included Murihiku Southland. The Farm Jam event ran from 2008-2020 at Otapiri and attracted some of the world's best freestyle riders. Various other events such as the Hokonui Moonshine Trail have attracted mainly local participants with a few out-of-region visitors. Welcome Rock opened in 2014 as a private mountain bike

and hiking loop trail with heritage accommodation.

Before the release of the Southland Cycling Strategy 2016 - 2026 there was little in the way of cycle tourism in Murihiku Southland other than event visitors and a very small cycle touring niche using roads. Until Around the Mountains Cycle Trail was built there were no significant purpose-built off-road cycle trails or comprehensive mountain bike parks. Initially Around the Mountains Cycle Trail was serviced by Queenstown-based, and further afield, tour operators, which minimised the benefits for Murihiku Southland economy.

### POST-2016

Since the release of the Southland Cycling Strategy 2016 - 2026, the key new developments have been:

- Stage 2 of Around the Mountains Cycle Trail from Mossburn to Centre Hill shelter.
- Fiordland Trails Trust's Lake2Lake Trail from Te Anau to Manapouri opened in 2017 and more recently the Te Anau lakefront section was completed with a shared use bridge over the Upukerora River.

- Te Anau Cycling Inc developed a small set of singletrack trails at the lake outlet.
- Waihōpai Invercargill to Bluff Motupōhue - Te Ara Taurapa Trail was completed.
- Waihōpai Invercargill projects, including various road treatments to improve urban cycling safety, plus the Dunns Road trail to Ōreti, with adjoining Airport trail and the pump track at Otatara.
- Hokonui Bikers Club completed the Water Race track in Croydon Bush, near Māruawai Gore.
- Increased tour experiences and bike hire in Te Anau and Rakiura Stewart Island, still limited in Waihōpai Invercargill and Māruawai Gore.
- Cycling Southland is providing the Ride Well programme through schools developing bike skills.
- Bikepacking has grown in popularity, using existing trails and roads.
- The Southland BMX Club has upgraded the Elizabeth Park BMX track in Waihōpai Invercargill to national competition standard.

### AS OF 2023

The following projects are underway:

- Enhanced/new trails and facilities at Motupōhue Bluff Hill.
- Invercargill City Centre upgrade includes lead-practice cycling spaces and facilities.
- Fiordland Trails Trust obtained resource consent for the first section of the Te Anau to Te Anau Downs trail.
- Waikaia Trails Trust secured forest land access, completed their pump track and has made a good start on raising funds for its destination mountain bike park.
- Southland District Council and Active Southland have contracted the provision of a relocatable pump track to be rotated through various towns over the next few years.

The following projects are under investigation:

- Off-road cycle trail for Around the Mountains Cycle Trail between Mavora Lakes and Centre Hill section.
- Te Anau to Te Anau Downs off road trail.
- Milford Opportunities Project proposals for Eglinton Valley and Knob's Flat trails and accommodation.
- Waiau River (Manapouri to Te Waewae Bay) initial scoping and Western Southland Trails Trust seeks funding for a full feasibility study.
- A community cycle trail group is investigating options for a trail from Riverton to Colac Bay.
- A high-level feasibility review is being completed for a coastal trail in Te Akau Tai Toka The Catlins.

Although Murihiku Southland is at a fledgling stage compared with other cycle tourism regions, these developments provide a reasonable cycle tourism resource to step up promotion and build capacity of the support industry.

The Strategic Tourism Assets Protection Programme (STAPP) funding received from MBIE, has enabled Great South to commission this cycle tourism opportunity assessment to initiate a coordinated approach in cycle tourism content development within the region.

If the proposed trails can be consented and funded this will position Murihiku Southland as a must-consider region for any cycle visitor planning their next trip, attracting a growing share of those visitors already drawn to Central Otago and Queenstown Lakes trails.

# SWOT analysis

## STRENGTHS

- ✔ Fiordland is recognised as Aotearoa New Zealand's most iconic scenic and hiking destination so offering this scenic experience for cyclists will place it at the top of the aspiration list.
- ✔ Around the Mountains Cycle Trail benefits from official Great Rides status, exposure and government funding access.
- ✔ The FTT Lake2Lake and Te Ara Taurapa (Waihopai Invercargill - Motupōhue Bluff) trails have expanded Murihiku Southland grade 2 trail inventory and are starting to draw cyclists further into the region.
- ✔ The Tour Aotearoa (cycling) and Te Araroa (walking) trails both end in Murihiku Southland, creating positive profile for the region.
- ✔ Adjacent to Queenstown Lakes and Central Otago which are already seen as top cycling destinations in Aotearoa New Zealand.
- ✔ SBS Bank Tour of Southland national and international profile.
- ✔ Murihiku Southland is still seen as a leader in track and road cycling.
- ✔ Strong regional mountain bike club which engages well with other local clubs, with a long history of hosting national mountain bike events.
- ✔ Motupōhue Bluff, Sandy Point, Welcome Rock and Hokonui Hills all established mountain bike assets, with Motupōhue Bluff undergoing a significant upgrade.
- ✔ Proposed Waikaia mountain bike park and significant work already achieved by the Trust.
- ✔ ILT, ILT Foundation and Community Trust South as strong investors in community events and facilities envied by many other regions.
- ✔ All Southland District Council Community Boards are articulating aspirations to develop community cycling facilities which add to the proposition for visitors.
- ✔ Increasing air access with Auckland-Waihopai Invercargill flights.
- ✔ Ōreti Beach ride.
- ✔ Southland District Council and Active Southland trialling a relocatable pump track to test demand and inform permanent investment decisions.

## WEAKNESSES

- ✘ Lack of a connected regional network of high-quality trails.
- ✘ Around the Mountains Cycle Trail reputation impact due to not completely off-road.
- ✘ Lack of a world-class mountain bike park.
- ✘ Lack of a targeted (specialist content) cycle tourism and trip planning digital hub to help promote the offering.
- ✘ Limited bike hire options outside Te Anau and Rakiura Stewart Island.
- ✘ Fledgling status of Murihiku Southland's cycle tourism operators and businesses, with few trade ready.
- ✘ Weather can be less favourable than many competing cycle destinations.
- ✘ The cycling experience on current trails has been compromised by budget and time pressure in some areas (e.g. Waihopai Invercargill to Motupōhue Bluff trail beside state highway).
- ✘ Cycling precluded from Fiordland National Park.
- ✘ Cycling largely precluded by current Conservation General Policy linked to the prescriptions in the Murihiku Southland CMS.
- ✘ Land access - landowners can feel threatened by the concept of new public access trails.
- ✘ Lack of an official IMBA Epic Ride.
- ✘ Council and ratepayer caution on trail developments.

## OPPORTUNITIES

- ✔ More partnership with Iwi and the region's four Paptipu Rūnaka on trail concepts, historical linkages, naming, storytelling, interpretive sculptures and potential trail related businesses and employment.
- ✔ Cycling experiences are well positioned to meet increasing demand for certified sustainable tourism products and shift towards low emission tourism.
- ✔ Cycle tourism projects attracting national funding that also delivers better facilities and lifestyle opportunities for local communities.
- ✔ E-bikes attracting a much broader market, including a higher spend demographic, with more free time and enabling rides in strong wind, on steeper terrain and covering greater distances.
- ✔ Milford Opportunities Project proposing new cycling trails and experiences between Te Anau and The Divide, which could support consideration of approved trails within the National Park.
- ✔ Bikepacking and gravel riding can be increased with no trail capital expenditure requirement and small digital content effort.
- ✔ Glamping and relocatable boutique accommodation enabling affordable, quality new accommodation provision for cycle trails.
- ✔ Growth in women's outdoors activities, groups, tours and events.
- ✔ Cycling facilities catalysing increased community engagement in ecological restoration.
- ✔ Cycle trail investment providing new fencing and riparian zone treatment as a benefit for farmers offering land access.
- ✔ Growth in cycling disciplines including enduro, cyclocross and gravel rides/ bikepacking.
- ✔ More floodbank cycleways could be included in planning as Environment Southland tackles erosion and some landowners have renewed understanding of their obligations to manage vegetation.
- ✔ Increasing case study evidence of sustainably built and managed cycle trails to inform consent applications.

## THREATS

- ✘ Continued ad-hoc planning of cycling infrastructure will fail to deliver optimal outcomes.
- ✘ Failure to engage local and regional government to include funding for cycle trails and facilities will see central government funding continue to be drawn by other regions.
- ✘ Environmental and other recreational groups philosophically opposed to cycle access and ignoring the growing body of evidence supporting sustainable trail development and the net benefits of increased cycling access.
- ✘ Climate change, extreme weather and sea level rise threatening cycling infrastructure.
- ✘ Bike theft is becoming a major problem and experience detractor for both residents and visitors throughout Aotearoa New Zealand, especially with e-bikes carrying higher value.
- ✘ Unsanctioned trail building upsetting statutory authorities and environmental groups.



## Existing trails, routes and cycling facilities in Murihiku Southland

This section outlines current cycling routes, off-road trails and facilities and provides comments on future opportunities for improvement, or extension, of these existing routes, trails and facilities.

**Cycle Touring/Bikepacking Routes**  
*Mostly on sealed roads, including state highways, so more cycle touring than bikepacking. These routes however are not directly listed on the NZCT Great Rides website or included on Google Maps, nor are they signposted physically.*

Murihiku Southland also has the two Heartland Rides, the Southern Traverse from Lumsden to Motupōhue Bluff and the Nevis Valley Road into Garston, with the Southern Traverse given reasonable profile on the NZCT Great Rides website.

### WAKA KOTAHI NZTA CYCLING ROUTES

Waka Kotahi NZTA provides an online cycling map which is also embedded in the NZCT Great Rides website. The routes outlined on the map are described by colour coding.

#### NZCT Great Rides

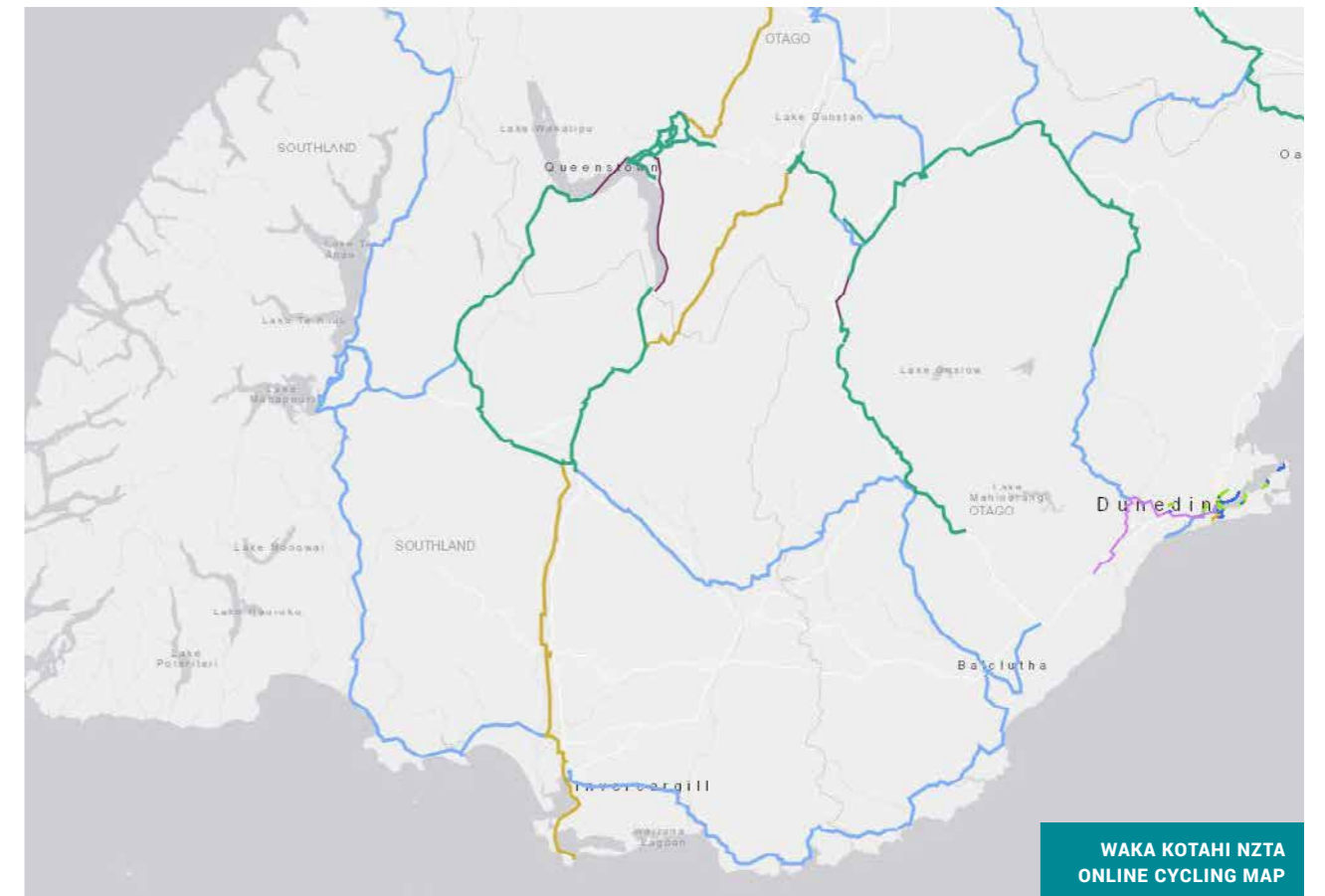
**Heartland Rides**  
*Mostly on-road routes through scenic landscapes and small towns.*

**Connector Rides**  
*Connecting NZCT Great Rides with each other or major population centres.*

Murihiku Southland has two cycle touring/bikepacking routes. One is the Southern Scenic Route, which largely follows the official touring route of the same name from Dunedin to Milford Sound, taking in Te Akau Tai Toka The Catlins, Waihōpai Invercargill, Riverton, Tuatapere and Te Anau. It diverts off the state highway onto the Otago-Haldane Road section to include Waikawa and Curio Bay. The other route is Lumsden to Clutha Gold/Beaumont, which largely avoids the state highways but in doing so also avoids users passing through Riversdale and Māruawai Gore.

#### Future Opportunities

There is little evidence that the cycle tourism market take much notice of the blue cycle touring/bikepacking route but there could be merit in revising some of these existing routes with NZCT Great Rides and Waka Kotahi NZTA with the goal of including towns that provide hospitality and accommodation services.



WAKA KOTAHI NZTA ONLINE CYCLING MAP

## AROUND THE MOUNTAINS CYCLE TRAIL

Around the Mountains Cycle Trail, which is part of the NZCT Great Rides network, is the only Great Ride in Murihiku Southland and is receiving steady growth in numbers of users in recent years.

A new Trust was established in 2021 to drive ATMCT through its next phases of development. The Trust's mandate is the user experience, product development and marketing and promotion with part of this administering the Official Partner programme. Southland District Council owns and maintains the trail asset including the website URL, ATMCT brand and Southland District Council directly employs the trail manager. This Trust has skills based, community representative trustees including a tour operator and representation from Southland District Council and Great South.

The improvements made to the trail and its marketing, along with an increase in operators servicing the trail specifically based within the region have seen a solid increase in users over the last four years. This growth occurred despite closed borders during Covid with many New Zealanders using the time they couldn't travel overseas to take cycling trips and holidays.

The profile that Around the Mountains Cycle Trail receives through being one of the 23 NZCT Great Rides, and also through promotion by Queenstown based tour operators, will contribute to the number of riders on the Te Anau Lake2Lake Trail, who otherwise may not have travelled to Murihiku Southland.

The decline of consent for access through the upper Ōreti Valley has meant the trail in this section is along a gravel road which compromises the trail experience.

Overall satisfaction of ATMCT was 8.7 out of 10. This is a consistently strong satisfaction rate, just slightly below the average of 8.9 out of 10 for all 23 Great Rides combined.

The key feedback on ATMCT, which comes partly from surveys and assessments by Jonathan Kennett and other trail experts is;

- Although the Von Hill section is technically straight forward as a gravel road it does push many lower grade riders in terms of the length, relatively steep gradient of the climb, its isolation, limited mobile coverage and risk of sub-alpine weather exposure.
- There is no accommodation in the 103km stretch from Walter Peak to Mossburn, other than the Mavora Lakes DOC camping site, which is non-powered.
- The road from Mavora Lakes to Centre Hill Shelter is an unpleasant

experience for many due to the amount of vehicles raising dust and the deep, coarse gravel on the shoulders which increases risk where riders are forced to the side of the road. Most tour operators collect and shuttle their clients past this section to accommodation and then drop them back to ride the off-road trail from Centre Hill.

- A section east of Mossburn travels alongside the main highway with powerpoles impacting the trail.
- While there has been a substantial reduction in the number of gates between Five Rivers and Athol, there does remain a small number for riders to open.

Other considerations include:

- The ATMCT is largely serviced by, and therefore supports, Queenstown-based operators, while the local government contribution was by Southland District Council.

The benefits for Murihiku Southland are to continue supporting current, and future, businesses and tour operators based within the region.

- Coming out of Covid, various cafes have hibernated, or in fact closed.
- There are opportunities to connect the trail to Queenstown off-road from Jack's Point to Kingston and via Glenorchy Greenstone.
- The ATMCT Trust and Fiordland Trails Trust have had initial discussions on connection to Te Anau.

YEAR	TRAIL USES
2019-20	6,584
2020-21	11,052
2021-22	13,331
2022-23	15,036

*Note trail uses includes both cyclist and pedestrian uses*

### Future Opportunities

Continue to focus on overall improvements to the ATMCT, including an off-road trail between Mavora Lakes and Centre Hill.

Investigate potential accommodation options in the Von Valley – Mavora Lakes area. Discussions about accommodation in this area have tended to conclude non-viability, but a robust assessment has not yet been done.

The Timber Trail Lodge in the middle of the two-day Timber Trail Great Ride is a useful case that has managed to sustain itself, although construction costs have gone up significantly since it was built. Budgeted at \$2.603m, the actual build was \$3.8m which included a \$1.25m Tourism Growth Partnership government grant. Proposed as 80 bed capacity it was only built with 20 rooms sleeping 45 with a mix of ensuite (\$540) and shared bathroom (\$430) double/twin rooms plus some triples. While the Timber Trail has much higher use than ATMCT, the lodge's only market is Timber Trail users as it is so remote from any other tourism flows. Appropriate accommodation in the Mavora Lakes area could attract a much

broader market being close to the flows between Queenstown and Fiordland.

Developments in glamping and relocatable, but very comfortable, built accommodation could reduce the capital investment required to start providing an accommodation offering to improve the overall ATMCT experience. Relevant examples include Dome Accommodation on the Alps 2 Ocean Trail and at Hawea campground; Eco Pods and the Alpine Cabins at Lake Stellar on the Mt Lyford Ski Area property.

A feasibility study focused on accommodation options would be the next step.

While a connection from ATMCT to Te Anau would create a larger, more aspirational trail network and enable low emission visitor experiences, most of the high-value cycle trail market is happy to consume trails in a series of multi-day chunks, using shuttles or self-driving in between. In the short-term supporting an extended offering in Te Anau, and surrounds, that warrants more than the one day's riding would complement the ATMCT with the future connection an important longer-term aspiration.





## LAKE2LAKE TRAIL

The Lake2Lake Trail was opened by Fiordland Trails Trust in 2017 and has quickly established itself in popularity with a wide range of local residents from cyclists through to families pushing buggies and elderly on mobility scooters. It has also provided an added visitor experience for Te Anau.

The L2L runs 28km from Te Anau to Manapouri with mostly grade 2 off-road trail and a small grade 3 section through beech forest. There remains a significant on-road section due to the preferred route passing through a small part of Fiordland National Park, where new trails are not permitted. Because of this highway section being suboptimal in terms of experience and safety, some users do the first half of the trail and return to Te Anau rather than continuing to Manapouri.

The Trust is proud of having created this trail with a comparatively low budget by project managing it themselves on volunteer time and working with a roading engineer with access to local quarry aggregate. The lakefront from Te Anau boat harbour north to a new bridge across the Upukerora river has since been added.

### Future Opportunities

Looking forward, completing the middle section to remove the road riding is urgent. The preferred route, which is through part of the Fiordland National Park, is unlikely to be resolved in the near future. However the Trust is currently investigating a proposed new route that would avoid the National Park but still provide a quality off-road experience.

There are some minor improvements the Trust can make to the trail experience including using a finer grade of aggregate as maintenance is carried out, reducing the current buildup of loose coarse gravel. A combination of signage and improved trail cambering will improve safety and ride experience on some of the corners where a descent results in acceleration into an off-camber corner with loose gravel.

The opportunity to extend trails

around Te Anau and to create two to three days' worth of riding will mean a step-change in Te Anau and Murihiku Southland's ability to attract cycle tourism, creating more benefits from their visits.

The recently completed economic impact assessment has highlighted community and stakeholder support for the Te Anau to Te Anau Downs trail and a Whitestone River trail which would form part of a loop from Manapouri to the east of Te Anau.

The first part of the Te Anau Downs trail has resource consent which pushes it up the priority list over Whitestone River trail. Te Anau Downs is also the connection to the longer-term network of the Milford Opportunities Project proposed trails in Eglington Valley.

For the above reasons progressing the consented sections of the Te Anau Downs trails should be a high priority.

## TE ARA TAURAPA – WAIHŌPAI INVERCARGILL TO MOTUPŌHUE BLUFF TRAIL

The Waihōpai Invercargill to Motupōhue Bluff trail, Te Ara Taurapa was completed in October 2021 as far as Suir Street, Motupōhue Bluff with an official opening in March 2022.

This project was initiated by Environment Southland and run in partnership with Invercargill City Council with significant funding from Waka Kotahi NZTA and Te Araroa Trails Trust. Contributions were also made by ILT Foundation and Community Trust South.

The name, Te Ara Taurapa was gifted by Te Rūnaka o Awarua and Waihōpai Rūnaka and means 'a journey along the taurapa (stern post) of the waka Aoraki'. Six interpretation panels, funded by Great South, have been installed along the trail sharing the cultural narrative developed by Te Rūnaka o Awarua and Waihōpai Rūnaka with further wayfinding information, seating and shelters being considered.

A feasibility study completed in 2009 assessed an off-road shared use trail to connect all the way from the Around the Mountains Cycle Trail at Lumsden, down through Winton, Waihōpai Invercargill to Motupōhue Bluff. This, and later proposals, considered options to take the Waihōpai Invercargill to Motupōhue Bluff section away from the busy state highway nearer the coast to enhance the experience in terms of scenery and tranquillity. However, the budget at the time was considered unaffordable and did not get support to proceed.

With ongoing pressure to address the safety issues for Te Araroa walkers, and cyclists, on the side of the state highway an off-road trail was completed providing a safe route and reducing concerns from drivers seeing walkers and cyclists dangerously exposed on the state highway shoulder.

While the completed trail now provides a safe and shorter route the rider experience is compromised where the trail is adjacent to the state highway which may limit repeat rides of the complete route, however there are good numbers using the trail sections closer to Waihōpai Invercargill that are waterside and removed from the main roads.

### Future opportunities

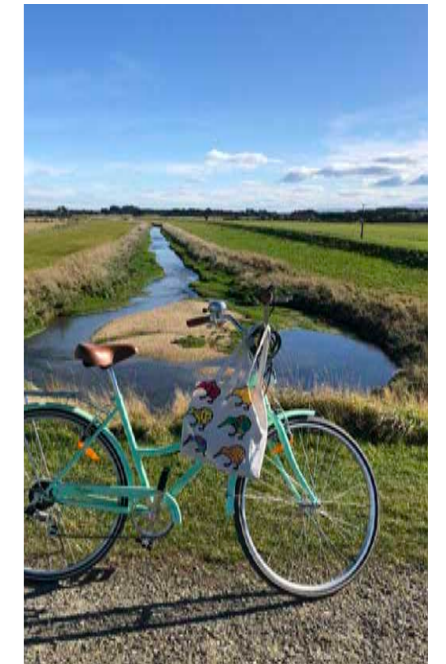
Completing the trail all the way through Motupōhue Bluff to Stirling Point and adding alternative coastal routes around Omaui and Greenhills.

With the Waihōpai Invercargill to Motupōhue Bluff connection already achieved, other trail projects are likely to add more value in terms of realising the goal of a comprehensive and connected Murihiku Southland regional trails network. Southland Mountain Bike Club is still interested in this concept as part of the longer-term plan for building up the riding opportunities around the Motupōhue Bluff Hill mountain bike park, creating a loop ride with more scenic features. Concerns with this alternative coastal route include coastal weather exposure and negotiating land access.

## WAIHŌPAI INVERCARGILL TRAIL NETWORK

In addition to various improvements to on-road cycling Waihōpai Invercargill now has a growing set of off-road cycle trails, such as Te Ara Taurapa Waihōpai Invercargill to Motupōhue Bluff, including the estuary pathway, and the new Dunns Road trail connecting the city to Ōreti Beach and Sandy Point, with a recent extension to the airport.

The above connections link the Waihōpai riverbank trails adding to



the trails in Queens Park, Otepunī walkway, the southern greenway, recreation reserve along Scott Road and Kingswell stream.

Together these trails represent a reasonable recreational and commuting trail network with the issue that they are not well connected or presented in terms of wayfinding signage, mapping and online information.

### Future Opportunities

While most of these trails can be found individually on various websites, there is no single source of information presenting the network in an easily discernable format targeted at cyclists.

The closest is an Invercargill City Council brochure 'Short Walks in the Invercargill Area' which shows local trails and identifies which ones are walking-only and which ones allow bikes.

There needs to be one Waihōpai Invercargill map in print and online, showing all of the off-road cycle paths and how they link together.



## WAIHŌPAI INVERCARGILL CITY CENTRE MASTERPLAN

Below is what the Invercargill City Centre masterplan proposes with respect to cycling:

*The central city becomes connected to Waihōpai Invercargill wider cycle network, enabling locals to cycle into the city comfortably, safely and efficiently. The city is connected to the Tour Aotearoa and Te Araroa trails, linking to nationally significant tourist routes and connecting the city to its river and estuary. Within the city cyclists of all abilities have options; on-road cycleways provide great movement along busier routes (particularly for experienced riders), while slow streets allow cyclists to move safely. Shared spaces are about pedestrians first, with cyclists being welcomed and encouraged to ride to the conditions. For example: slowly and carefully during busy times with the ability to increase speed in quieter times. There are always reasons not to cycle, and 'end of trip facilities' can counter common reasons through provision of covered cycle storage, lockers, toilets, showers and e-bike charging stations. A number of facilities are proposed already within the central city in anticipation of increasing cycle usage.*



## RAKIURA STEWART ISLAND E-BIKES

There are two options for e-bike hire on Rakiura Stewart Island, Stewart Island Electric Bikes, just opposite the Museum and RealNZ have e-bikes for hire on the wharf.

The rides are mainly on existing road and as such have quite steep sections that would not be ideal for a standard bike experience. However, this is why e-bikes are perfect as it makes the hills manageable. There is a small section of off-road path, beside the road, over to Horseshoe and Lee Bay where the Rakiura Track starts. The other rides are up to Observation Rock and out to Acker's Point.

It is also possible to ride part of the Rakiura Track that is outside the National Park boundary, from Main Road and Fern Gully Road to Kaipipi Bay. Much of it has a cobbled effect and is muddy and rutted in places which would be challenging for some riders. The Back Road link through to Horseshoe Bay also provides a nice loop ride. There are also some coastal walking tracks northwest of Oban which could conceivably be upgraded to shared paths.

There was also consideration of new trail development in association with the windfarm project on Rakiura Stewart Island, which is being reassessed.



### Future Opportunities

Enhancing the cycling opportunities on Rakiura Stewart Island will help to contain growth in car use by visitors not used to local roads. The key opportunity is to upgrade some of the off-road and backroad trails mentioned, and improve wayfinding via signs, online maps and printed collateral.

There is limited scope for more hire businesses, rather existing ones should build sustainably alongside local accommodation providers catering to cyclists and coordinating with the hire providers.

RealNZ already experience some logistical issues with people taking their own bikes on the ferry and trying to avoid them getting covered in salt water. It will be important for local tourism and community plans to set direction, and possible policy, on managing whether more visitors can bring their own bikes or they have to use rental providers.

### Future Opportunities

There is an opportunity to identify and develop additional strategic linkages, particularly:

- North-South along the eastern margin of Waihōpai Invercargill linking up the various riverbank trails to create a loop around the city.
- Utilising the river floodbanks to extend trails further out of the city.
- Linking to the CBD shopping, dining and accommodation.
- Increase trails through the park spaces alongside the Southern Scenic Route and Queens Drive.

This would create a compelling cycling network that would get well used by locals and provide extra appeal to visitors, both leisure and business, especially if convenient bike hire is made available for business travellers so they can ride

before and after work and easily return without being restricted to 9-5 shop opening hours.

When considering NZCT Great Rides which have the highest user numbers (Hawke's Bay Trails, Tasman Great Taste Trail and Queenstown Trails), the common factors are easy trails which are easily accessed by a local population, as well as attracting regional visitors. Waihōpai Invercargill, as the key population centre, represents Murihiku Southland's opportunity to emulate this type of cycling resource and success, with residents making up the majority of users. Māruawai Gore and Te Anau have the next largest local populations and in the case of Te Anau, visitors will eventually make up the majority due to its high visitor flows.

While a lot of focus goes on multi day trails because they can be more

aspirational and they result in more overnight stays, one of the key findings from the 2021 Evaluation of Ngā Haerenga Great Rides of New Zealand was that there is demand for shorter 1-2 hour rides, both as individual short trails or just doing short sections of multi-day trails. This is sought by people who just want to fit some cycling into a wider visitor experience but also to help new cyclists develop their skills and capacity before tackling longer multi-day rides. They also attract use from local residents.

Waihōpai Invercargill trails are the most likely in Murihiku Southland to be able to attract Waka Kotahi NZTA funding due to the number of residents and likely ongoing demand, but there are other funds which could be approached relating to nature-based trails around the city. Wellington recently received \$650k for such a project.



## ŌRETI BEACH

The ride along Ōreti Beach is quite distinctive from opportunities in other regions with Ninety Mile Beach in Northland and some of the Kapiti Coast in the lower North Island being the main exceptions. It is somewhat limited by bigger tides and very exposed to inclement weather.

### Future Opportunities

An option of a parallel trail behind the dunes is a potential opportunity to complement this ride. It would create a loop option and an alternative for rough weather, king tides and flooding of the stream outlets.

## NEVIS VALLEY – BANNOCKBURN TO GARSTON ROUTE

The Nevis Valley Gutbuster, a 75km event between Garston and Bannockburn, has been running for decades now. This route follows Aotearoa New Zealand highest altitude driveable public road. It is designated a Heartland Ride by Waka Kotahi NZTA and has become a popular bikepacking route. It also passes Welcome Rock trails and accommodation.

### Future Opportunities

This route has further potential to be promoted as an inter-regional link from Central Otago. As e-bikes develop increased range it will become accessible to a wider ability range of riders.

## BORLAND PASS ROAD AND PERCY SADDLE

The Borland Pass Road has long been promoted as an adventure ride for the groups and schools which use Borland Lodge as an outdoors retreat. Bike Fiordland promotes a Borland Road supported package, but uptake is limited.

It can be an in-and-out ride, starting or finishing with Lake Manapouri south arm ferry, or done with a shuttle. Being a driveable road, the surface is easy grade but the climb is vast so unless shuttles are used the market for this type of backroad ride is limited when there is so much choice now for purpose built cycle trails. However the growing gravel/bikepacking market does appreciate this type of experience.

The distance from south arm to Borland Lodge is 40km so with the climb this is pushing the limits of most current e-bikes but as battery range improves this road becomes more of an option.

The Percy Saddle is another level up in terms of difficulty, with a similar large climb and the pass itself having no benched track, requiring Hike-a-Bike. In fact, the trail marking is so limited people report getting lost, clambering through steep bush terrain trying to follow it.

This route can start or end with the west arm or south arm ferry or be combined with the Borland Pass. As noted on the Sound to Sounds



event map, one route option, (as an alternative to the main one into Piopiotahi Milford Sound) is to ferry to west arm and ride the Wilmot Pass to Deep Cove in Patea Doubtful Sound.

### Future Opportunities

The main proposals in previous trail opportunity reports have been to investigate viability of a modest upgrade of the Percy Saddle route to make it rideable but keep it targeted at more experienced riders. This will be difficult unless Fiordland National Park policy changes.

Because these routes are already mostly gravel road they would not meet criteria to be designated an IMBA Epic Trail unless new single track trail alignment was built for 80% of it. The required investment and resilience risk of new trail would likely outweigh the value created by bikepackers camping along this route until Borland Lodge.

## BALD HILL/ LONGWOOD FOREST

Longwood Forest Conservation area has multiple tramping tracks and a 4WD management road up to the Bald Hill communications mast that allows bikes, but it is not designed

for mountain biking. The Te Araroa Trail comes over the Longwoods already and the highest elevation is 805m with the open tussock land tops providing stunning 360-degree views from Motupōhue Bluff back up to the Tākitimu ranges.

There do not appear to be any plans for new bike trails at present, however, when considering the requirements for an International Mountain Biking Association Epic Trail this terrain and location could have the most potential in Murihiku Southland.

An alternative approach is to develop what could be the longest descent trail in Murihiku Southland, using the existing management road to enable for shuttle uplift access. Being public conservation land, bike trails outside the existing vehicle tracks would not be approvable without an update to the Conservation Management Strategy (CMS). There are some sensitive species and habitats on the tops that would need special treatment to ensure a sustainable trail and this area is popular for hunting so wider consultation will be important.

### Future Opportunities

The concept of a trail through the Longwoods should be high-level feasibility tested before any decisions on the network between Tuatapere and Colac Bay are made.

This could be an alternative to a trail closer to the coast or state highway, although Gemstone Beach and Orepuki Café would be good stops to include.

If this was the link in the wider regional trail network then the trail would need to be no higher than grade 3 to keep it accessible to a wide user group, whereas the IMBA Epic Trail option would lean towards grade 3-5.



## INTERNATIONAL MOUNTAIN BIKING ASSOCIATION ACCREDITATION

The International Mountain Biking Association is primarily US-based but has global influence and has been a leader in developing best practice sustainable trail building guidelines and lobbying for trails access.

The IMBA Ride Center designation represents IMBA's recognition of large-scale mountain bike facilities that offer something for every rider. From backcountry adventures to shuttle-served gravity trails, and from expert-only to family-friendly, visitors should be able to ride for days and encounter the best mountain biking has to offer. Ride Center applications are accepted annually and fully vetted by trail professionals.

Aotearoa New Zealand has three officially designated IMBA Ride Centers. Rotorua and Nelson are designated gold and Taupo silver. To put this into perspective, despite Australia having several world-renowned mountain bike destinations, only one has official IMBA Ride Center designation – Mt Buller, Victoria, at bronze level.

IMBA Epic trails are one of the features which can help a destination achieve boosted reputation and profile through IMBA. An Epic trail should be at least 20 miles (32km+), 80% singletrack,

technically and physically challenging, and beautiful to behold and worthy of celebration. The Bald Hill/Longwood Forest area is noted as a potential IMBA Epic trail area.

As of January 2023, there were 53 IMBA Epic trails located worldwide:

- United States (42)
- Canada (4)
- New Zealand (2) – Old Ghost Road and Heaphy Track
- Australia (1) – Mt Buller
- Wales (1)
- Finland (1)
- Switzerland (1)
- Iceland (1)

It would be a challenge for Murihiku Southland to achieve IMBA Ride Center designation. Long term the region could deliver on more NZCT Great Rides, a possible IMBA Epic back country ride and an attractive combination of future mountain bike parks – however, these are more spread out than is sought for an IMBA Ride Center and there is currently no single mountain bike area in Murihiku Southland that has the capacity for quantity and range of trails and facilities that could compare with other IMBA Ride Centers.

IMBA accreditation does require monetary investment and it would be seen as a nice-to-have rather than a must-have for Murihiku Southland. However the concept of an IMBA Epic trail would be an opportunity to consider pursuing.



## MURIHIKU SOUTHLAND MOUNTAIN BIKE PARKS

Motupōhue Bluff Hill is currently Murihiku Southland strongest opportunity to become one of Aotearoa New Zealand must-do mountain bike park destinations and should be an ongoing priority for investment. However, while 210m total elevation is very respectable for a mountain bike park, this and probable limitations on major footprint expansion will make it difficult to create a world-class mountain bike park. The Hokonui Hills terrain has greater elevation potential but achieving approvals for new trails will take more time.

**The combination of Motupōhue Bluff Hill, Hokonui Hills, Waikaia Forest, Te Anau Trails and Welcome Rock is becoming a more compelling proposition to attract mountain bike visitors for a multi-day trip through Murihiku Southland.**

### Motupōhue Bluff Hill Mountain Bike Trails

Motupōhue Bluff Hill has a maximum elevation of 210m and average gradient of 18% making it suitable for a wide range of trails. It currently has around 27km of trails in total and is relatively unique in Aotearoa New Zealand in having a sealed access road to the summit, enabling shuttle uplift. It has had some national recognition having hosted national competitions in cross country, downhill and enduro, including 2022 Skoda Secondary

School Championships. The area has a wide range of users and several walking only trails adjacent. The Southland Mountain Bike Club has a good relationship with Awarua Rūnaka and supports the pest control programmes on Motupōhue Bluff Hill.

Being within 25 minutes' drive from Waihōpai Invercargill enables regular use by locals and encourages ease of access for visitors, especially as more mountain bike visitors come to Murihiku Southland. As a visitor proposition Motupōhue Bluff Hill also benefits from the interpretation panels and spectacular views.

The current limitations are the trails are skewed towards intermediate to advanced riders and some legacy trail design has led to high-maintenance requirements. Facilities such as parking and toilets need improving. Despite this there is ongoing anecdotal feedback that visiting riders find some of the trails refreshingly old-school and technical with narrow, rocky, rooty trails. There is a segment of the mountain bike market that perceives many trail areas as being 'too groomed and dumbed down' so there is a distinct appeal for these old-school trails that a segment of the market still loves.

As of early 2023 Motupōhue Bluff Hill mountain bike park could be described as ranking mid-range in Aotearoa New Zealand full set of mountain bike parks but that is in the process of stepping up. Invercargill City Council, with support of Great South, has been successful in

securing Tourism Infrastructure Fund (TIF) funding from MBIE to assist funding a project to address the above issues and move towards the vision "to develop Motupōhue Bluff Hill into a national mountain biking destination with a trail network that meets the needs of both the recreational and elite riders."

The improvements include building new mountain biking and walking trails as well as developing a dual trail to create a loop connection with existing trails, upgrading existing trail infrastructure to improve sustainability, enhancing signage to improve wayfinding, installing trail counters, and creating quality cycling experiences and events. There will also be increased car parking capacity and beautification of the site as a destination recreation facility with a rest area and an accessible toilet block.

### Future Opportunities

Continue to support the progress and developments at Motupōhue Bluff Hill mountain bike park as Murihiku Southland's primary mountain bike destination. Once the Tourism Infrastructure Fund investment is complete, ongoing improvements would include expanding the total km of singletrack offered and the range of trail grades to appeal to the widest range of rider abilities.

## Sandy Point Cross Country Mountain Bike Trails – Waihōpai Invercargill

This trail park is primarily cross country style mountain bike trails through pine trees and dune scrub.

Because there are no significant hills or elevation it does not provide the opportunity for a major destination trail park. However, the free-draining sandy soil and rideable proximity to Waihōpai Invercargill are strong points and it is a good resource for skills development. It can, and does, host competitions and also lends itself to the growing cyclocross discipline.

Boffa Miskell, on behalf of Invercargill City Council, is currently developing a new masterplan for Sandy Point however this does not include any major mountain bike developments.

## Hokonui Hills Mountain Bike Trails – Māruawai Gore

Hokonui Bikers Club (which is affiliated to Southland Mountain Bike Club), now has a concession in place with DOC and has developed the 7.8km Hokonui Water Race trail to the required standard. This connects Pope Road/Croydon Bush with Dolomore Park. A connecting trail from Māruawai Gore, beside Reaby Road, is gradually being developed, enabling a safer half hour ride from the town centre to the trails head.

Some earlier unsanctioned trail activity had caused upset with stakeholder groups and DOC but

the new concession now gives the Club the chance to build its reputation as a responsible trail manager.

The Club has worked to build its relationship with Hokonui Rūnaka, including renaming trails and supporting pest control activity along with DOC and environment groups.

The other trails near the Pope Street trail head are quite technical and will need significant work to deal with drainage and meet sustainable trail criteria.

### Future Opportunities

Of all of the areas in Murihiku Southland with existing or planned mountain bike trails, Hokonui Hills/Croydon Bush has the best potential total elevation difference, enabling sufficient trail length to create a world class trail destination.

With only a 40 minute drive to Waikaia from Māruawai Gore, if these two areas develop significant bike parks it will create a stronger dual destination drawcard for Murihiku Southland with two days (weekend-worth) of riding. This would attract more mountain bikers from Queenstown, Dunedin and ultimately further afield.

## Welcome Rock – Garston

Welcome Rock is fairly unique in Aotearoa New Zealand being privately owned and including hand-built singletrack mountain bike trails taking in heritage sites and accommodation with a \$23 fee for a trail day pass.

The current 27km of loop trail is half of the overall plan and as such lends itself to one day's mountain biking and two days walking. Therefore, walkers often take the 2-day package with accommodation but many mountain bikers don't stay overnight.

Being within 1 hour 15 minutes' drive from Queenstown is a plus in terms of market access but also means the easy day trip results in most of the spend remaining in Queenstown, other than the trail fee and perhaps some food and fuel in Garston or Kingston.

### Future Opportunities

To create more economic benefit for Murihiku Southland the trails could be extended down through forest in the Nokomai River valley and to several heritage sites, depending on landowners' plans. This would result in 3-4 day's walking and 2 day's riding. The next step would be a full feasibility and business case investigation for the potential extensions.



### Perenuka Park – Te Anau

Perenuka Mountain Bike Park is 6kms of trails on a private farm, managed in partnership with Te Anau Cycling Inc.

Located 6km north of Te Anau it has a mix of cross country and gravity trails, albeit short ones as it is a relatively small area with limited elevation to work with. An independent review noted the grading of trails needing adjustment (i.e. some are more challenging than the grading suggests).

#### Future Opportunities

As the planned trail to Te Anau Downs is developed this will connect Perenuka with off-road access from Te Anau. Perenuka has potential for enhancements, depending on the landowner's plans, but is unlikely to be able to provide a major mountain bike park destination.

### Te Anau Outflow Trails

Located by the lake outflow into the upper Waiau River and accessible on the Lake2Lake Trail, these are eight, mostly family-friendly, singletrack trails totaling just 3km on DOC reserve. They offer an interlude for singletrack enthusiasts as they ride the Lake2Lake and a place for locals to access easily. There is not enough terrain or elevation to expand this significantly.

### Ivon Wilson Recreational Reserve – Te Anau

This reserve is mainly dedicated to walkers but has some shared trails including purpose built singletrack through mature conifers. School competitions have been hosted here but there is not much elevation to work with to create a significant mountain bike park destination.

### Hart's Hill and Snowden Forest Proposals – Te Anau

The main locations in the Te Anau area which provide significant elevation to create a compelling

gravity mountain bike park destination are Hart's Hill (which is in Fiordland National Park across the outlet near the Kepler Track) and Snowden Forest, 26km north of Te Anau.

Te Anau Cycling Inc signed a management agreement with DOC to gain trail building access to Snowden Forest in May 2018. Four areas were considered; Henry's Creek, Margin Forest, Boyd Creek and Te Anau lake edge beyond Patience Bay. Trail scoping work was undertaken in the Henry's Creek area in 2019 and proposed 28km of trails at an estimated cost of \$537,000. A subsequent assessment of impacts on native vegetation concluded the impacts would be minor.

These trails would also serve to connect the Te Anau Downs easy trail with any future trail in the Upukerora Valley and on to Kiwiburn and the Around the Mountain Cycle Trail. However, this is also on Conservation land, so precluded by current DOC policy. Therefore, TACI is not investing further effort, or money, into this area currently.

## BMX AND PUMP TRACK FACILITIES

### Hamilton Park – Māruawai Gore

Hamilton Park in Māruawai Gore has an old-school gravel BMX track and four short cross country mountain bike trails on relatively flat terrain by the Waikaka stream. The Gore BMX Club folded but Southland BMX Club is hoping to see it resurrected.

### Elizabeth Park BMX Track – Waihōpai Invercargill

The Southland BMX Club has carried out a \$400k upgrade to the Elizabeth Park BMX track in Waihōpai Invercargill. This is using internationally renowned Velo Solutions and will result in a national competition standard track although not UCI rated due to the 5m (rather than 8m) height of the start ramp.

Pre-Covid, Southland BMX Club was one of the only clubs still growing in Aotearoa New Zealand with 120 members.

The goal is to host one major event per year with 200-400 riders, most of which have a parent with them; and host the nationals in 2025 with 800-1000+.

The Club's approach is rather than keeping a closed perspective on BMX, to get kids on bikes and teach them skills which enable them to progress in BMX or go into other cycling disciplines.

#### Future Opportunities

Hosting these significant events allows Southland BMX Club to expose the participants' parents, who are usually cycling enthusiasts in varying disciplines, to the various opportunities the region holds from the indoor velodrome to cycle trails and parks and help attract them to the region to visit again, stay longer or to live.



## SIT ZERO FEES VELODROME

Opening in 2006, the SIT Zero Fees Velodrome was the first indoor velodrome in Aotearoa New Zealand and elevated the region as a competitive track cycling hub. Whilst Cycling New Zealand chose to base the cycling centre of excellence in Cambridge, once the country's second velodrome was built, Murihiku Southland still remains the only indoor velodrome in the South Island. This, combined with the annual SBS Bank Tour of Southland and Cycling Southland's event expertise, maintains Murihiku Southland reputation as a strong competitive cycling region.

#### Future Opportunities

The key cycle tourism potential includes better profiling and packaging of the opportunities to have a go at track cycling for visitors, particularly as an indoor, all-weather activity option.

The other opportunity is attracting more, or developing new events, increasing the stay and spend of event visitors and maximising the publicity opportunities for the region.



## Proposed trail projects in Murihiku Southland

### FIORDLAND TRAILS TRUST ADDITIONAL TRAILS

In addition to wanting to complete the off-road section in the middle of the Lake2Lake Trail, Fiordland Trails Trust has resource consent to start the Te Anau to Te Anau Downs trail which creates a connection to Perenuka Mountain Bike Park at Sinclair Road. The next stage would be to 10 Mile Bush (Boundary Creek) and the last stage to Te Anau Downs, which is in Fiordland National Park and therefore unlikely to happen in the near-term.

The opportunity to extend trails around Te Anau, creating two to three days' worth of riding, will mean a step-change in Te Anau and Murihiku Southland ability to attract cycle visitors and create more benefits from their visits. The recent economic impact assessment has highlighted community and stakeholder support for the Te Anau to Te Anau Downs trail and a Whitestone River trail which would form part of a loop from Manapouri to the east of Te Anau. As the first part of the Te Anau Downs trail has resource consent this pushes it up the priority list over Whitestone River.

Te Anau Downs is also the connection to the longer-term network joining to the proposed trails in Eglington Valley investigated through the Milford Opportunities Project.

**For the above reasons progressing the consented sections of the Te Anau Downs trails should be a high cycle trail investment priority for regional and national support. This would take Te Anau to the next stage of being recognised as a compelling cycling destination with at least two days of riding as well as offering short sections accessible from the town and accommodation providers.**

### MILFORD OPPORTUNITIES PROJECT PROPOSED TRAILS

The Milford Opportunities Project masterplan seeks to deliver a world class visitor experience in a more sustainable manner with enduring partnership with Ngāi Tahu. There are several management changes and developments proposed at a series of nodes from Piopiotahi Milford Sound to Te Anau in association with a transformed access model. Of primary relevance to this cycle tourism opportunity assessment are the proposals for Te Anau as the

destination hub and the proposed new trails (and associated infrastructure) within, and connecting, to Eglington Valley.

Reports developed to inform the masterplan had the following recommendations to develop Te Anau as the destination hub:

- The redesign of the Te Anau waterfront and town centre.
- The creation of new walking and cycling tracks into Te Anau.
- The optimisation and development of new family friendly experiences close to Te Anau in areas such as Brod Bay and Hidden Lakes.
- Exploring opportunities to the south of Te Anau.

The masterplan essentially proposes a new cycling/shared pathway between the Fiordland National Park entrance and Cascade Creek.

The masterplan has 10 key concepts, with one of those being 'develop multiple experiences along the corridor structured around key nodes'.

Two actions to support this were:

1. Enable a shared cycling and walking trail within the Eglington Valley via the nodes.

2. Enhance accommodation within the corridor, such as the redevelopment of Te Huakaue Knobs Flat with accommodation (camping, cabins and campervans), day and night nature experiences and river flats/grassland walks and cycling – plus better services and solar/hydroelectricity.

The Milford Corridor is proposed to be more than a road for vehicles and aims to provide active travel links between nodes that are more leisurely and personal. Continuous, shared cycling and walking trails are proposed to link nodes and short stops in the Eglington Valley for a new non-trafficked journey experience away from Milford Road. These aim to link in with community-initiated trails that are planned for development between Te Anau and Te Anau Downs, with an opportunity for them to continue alongside Milford Road to join the Te Rua-o-Te-Moko Fiordland National Park entrance.

The trails will be split into two sections with day facilities at each node. The southern section will link the Te Rua-o-Te-Moko Fiordland National Park entrance to Te Huakaue Knobs Flat where additional accommodation and some hospitality would be available. The northern section will link the

two accommodation and experience nodes from Te Huakaue Knobs Flat to Ōtāpara/Cascade Creek. The hop on/hop off bus service could be used to drop cyclists to the northern end for a one way, easily graded experience through to Te Huakaue Knobs Flat and beyond.

As of mid-2023, the Milford Opportunities Project is procuring a recreational demand analysis and feasibility studies on the various Eglington Valley trail concepts.

Although the number of cyclists riding the whole Milford Road is minimal, it is considered an iconic cycling experience among road touring enthusiasts. During Covid, with the reduction in tourism traffic, the cycling experience was enhanced and even more appreciated by this segment.

Under the masterplan's proposed access model, there would be less, more evenly spread traffic on Milford Road. Most of the vehicles would be driven by higher skilled drivers trained to take care of cyclists. This could enable short sections of some of the more topographically constrained or highly ecologically sensitive areas to be narrowed to a single track or bypassed using grade separated and barrier protected pathways within the road

corridor. So, while it is not proposed to focus on promoting the whole Milford Road as a cycling experience there is the possibility to enable modest growth in cycling the whole route. Overall though, the masterplan envisages cycling experiences remaining on the Te Anau side of The Divide on more suitable terrain.

Apart from funding, the key barrier to implementing trails in Eglington Valley and places like Hidden Lakes remains the National Park Plan precluding cycling access other than on existing vehicle roads. Bike access in National Parks has been achieved on the Heaphy Track (seasonal), the Paparoa Track, and new trails in Tongariro National Park. However the plan change, consultation and consenting process for these took several years. Any change to the Fiordland National Park Plan, even if commenced now, would take several years to navigate. The only way these cycle trails could otherwise be implemented is through new legislation specifically for the Milford Opportunities Project.

**From a regional cycle tourism proposition all of these trail proposals within the Milford Opportunities Project masterplan would be desirable and should be supported.**



## WAIKAIA FOREST TRAILS

The Waikaia Trails Trust is working on a mountain bike park on forestry land leased from council and adjacent to the town. The block is 700 hectares with 110m of elevation variation and the full staged plan includes 25km of grade 2 to 4 trails with a strong focus on beginner, intermediate and family friendly trails, with more advanced trails to be added in the later stages.

With existing forest access roads there is potential to run pre-booked shuttle days, including use of a side-by-side vehicle for small groups, while the modest park scale, and location, would mean a permanent shuttle operation would not be viable.

The land access has been approved, which is one of the biggest barriers for any alternative mountain bike park sites. The project is planned in roughly \$200,000 stages starting with the pump track which is being established on the edge of town as a gateway to the trail park.

There is strong community support with the Trust already having undertaken bike and other fundraising events. Written support has been received from various community organisations and schools in Waikaia, Riversdale and Lumsden. Southland Mountain Bike Club, Cycling Southland and MTBNZ have also written in support.

Waikaia's distance from significant resident populations and tourism flows is an obvious risk for this project, which as yet hasn't had a full feasibility study providing user demand analysis and economic impact. 25kms of trails with a maximum 110m descent profile is also on the small side for creating a must visit trail destination, however, it is within a day, or weekend trip, of all Southlanders plus Dunedin and Queenstown.

The professional expertise that has already been engaged reduces risk and the community backing and momentum already built by the Trust

creates a strong case for regional support of this project.

Waikaia is already growing as a character heritage destination and the fact that it is relatively unknown will create extra intrigue amongst mountain bike enthusiasts. Longer term, the Trust believes it could find additional land to extend trails.

If the Hokonui Hills trails, less than one hour away, can be extended to take advantage of the greater elevation profile there, this combination would create a nationally significant mountain bike destination drawing visitors for two days plus in the Māruawai Gore/Waikaia area.

**For the above reasons, even before considering the direct community benefits, this should be a key project for the region as it has the potential to progress quickly. Alongside the developments underway at Motupōhue Bluff Hill, Waikaia Forest Trails can start shifting the region's profile as a place where new exciting trail developments are happening.**



## WAIU RIVER TRAIL

For several years, Tuatapere Promotions and now the Western Southland Trails Trust have been working on the concept of a Manapouri to Te Waewae Bay Trail following the Waiau River. The initial concept was the "Southern Scenic Cycle Highway" leveraging the successful state highway touring route of a similar name.

The shared path is proposed to be approximately 100km long and "braided" like the river. Two alternative proposed routes started from Manapouri, merging at Monowai, then continuing as one to Te Waewae Bay. The grade 4 option starts with a boat from Manapouri to south arm, then using the existing Borland Road and pass to get to Borland Lodge. The grade difficulty is mostly related to the vast climb up to Borland Pass but technical riding difficulty is relatively easy on existing gravel road.

The other route follows the Waiau River from Manapouri, taking in the Mararoa Weir and Rakatu Wetlands. Borland Lodge is seen as a key accommodation stop where the two trail options merge. Three large suspension bridges would need to be constructed after the trail leaves Manapouri and at Motu where a historic suspension bridge was removed in the 1960s when the Monowai Road was put in.

A key driver of the trail project is reinstating community and visitor access to the Waiau River that was lost as a result of the Manapouri Power project. Meridian Energy is seen as a key stakeholder. The story of the impacts of the hydro scheme taking water from the lower Waiau would be showcased as part of the journey. This includes the impacts of reduced sediment and nutrients at Blue Cliffs Beach, devastating the Toheroa shellfish population. This concept of reconnection to the river is also important to Iwi with Ōraka-Aparima Rūnaka having already provided strong written support for the project. The route up the river relates to the path taken by ancestors from the wrecked Tākitimu Waka while the distinctive Tākitimu mountains are in view for much of the trail route.

The concept of making the south coast section of the Hump Ridge Track bikeable, comes up in association with this Waiau River trail project. While the Hump Ridge Track Trust did consider this option as part of a re-organisation of its operation and trail experience offering, it has been ruled out in the near to intermediate term.

Discussions have been held during 2020 with almost 40 landowners along the proposed Waiau River Trail, including PAMU, with a very high level of indicated support. The aim would

be to use the trail project to create a new 3-5m riparian strip alongside the river. One option to be investigated is whether local lime sand could be a feature of parts of the trail (as is done in Hawke's Bay) given the lime quarry at Clifden.

While the routes are designed to avoid trail construction within Fiordland National Park, the DOC General Policy and Murihiku Southland CMS presents a barrier to progress as this restricts new bike trails other than on existing roads on any public conservation lands. Significant parts of the trail need to access DOC and LINZ land (managed by DOC) on the river margin.

This trail would be an important revitalisation driver for Tuatapere and the rest of western Southland. It would add to the regional network creating a longer duration trail through the region, starting from the L2L trail and continuing on a possible Roaring Forties route to Colac Bay, Riverton and on to Waihōpai Invercargill. Notwithstanding the challenge of DOC policy, already having indications of support from most landowners, written support of local Rūnaka and the potential to engage Meridian, could help this project to progress.

**The next stage is for the Trust to secure funding for a feasibility study.**



## RIVERTON TRAIL CONCEPTS

Various trail proposals have been considered in and around Riverton. A 2011 Loop Trail proposal by the Riverton Community Concept Plan Committee proposed a loop trail from central Riverton, north-east up the estuary around the racecourse, south to Ōreti Beach and back into town.

More recently, a refreshed cycle trail working group has started investigating a trail between Riverton and Colac Bay. With the Te Araroa Trail already running along this coast options include adapting the Mores Reserve walking track or heading around Taramea Howell's Point and the working group have connected with a consultant to undertake preliminary estimates.

This trail would form an excellent section of the wider regional trail network connecting two communities and visitor destinations of Colac Bay and Riverton showcasing spectacular coastline and adding to the attractions on offer. It would also enable a longer off-road journey by connecting to the Ōreti Beach ride and on into Waihōpai Invercargill's trail network and through to Motupōhue Bluff. Another supporting factor is the 2021 Evaluation of Ngā Haerenga Great Rides of New Zealand suggesting more easy grade short rides for people to build into non-cycling itineraries.

**This project requires a more detailed feasibility study and further landowner discussions and engagement with iwi in order to proceed any further.**

## TE AKAU TAI TOKA THE CATLINS COASTAL TRAIL

The last two Te Akau Tai Toka The Catlins Sustainable Tourism Strategies, since 2002, have included recommendations to investigate feasibility of a multi-day trail on the Catlins coast. An investigation was carried out in the Clutha District in 2021-22 but the partial review of the

Otago CMS resulted in DOC ruling out consideration of cycle trails in several of the coastal blocks while the review was underway, so it focused on walking only trails. The review concluded there was insufficient support from landowners for a complete walking trail from Nugget Point to Papatowai but there were shorter sections where neighbouring landowners could consider an operation like the privately operated Banks Peninsula walk.

During 2022-23, Great South contracted a high-level feasibility review considering both bike and walking trails in the southern part of Te Akau Tai Toka The Catlins between Fortrose and Papatowai. This review is due for completion in late 2023 and, while there is interest within the wider community, initial discussions with landowners indicated strong concerns. There are likely to be significant costs to create a durable trail and structures in a rough coastal environment, weather exposure risk for trail users, and sensitive consenting issues around heritage sites, wildlife, wetlands and other biodiversity.

The Southern Scenic Route on the state highway through Te Akau Tai Toka The Catlins is already being ridden by some cycle tourists but many sections are unsafe with traffic including heavy vehicles.

An off-road shared use path through Te Akau Tai Toka The Catlins would be a jewel in the crown of the wider Murihiku Southland network and fits with the wider destination management approach to slowing visitors down, reduce carbon emissions and spend more in the community. This should be part of the long-term plan but seems unlikely to be deliverable in the next few years.

## NIGHTCAPS TO OHAI RAIL ROUTE

Members of the communities in Nightcaps and Ohai are interested in developing this rail alignment as a shared use recreational trail, however it still has the tracks on it.

**The next stage would be a full feasibility assessment.**

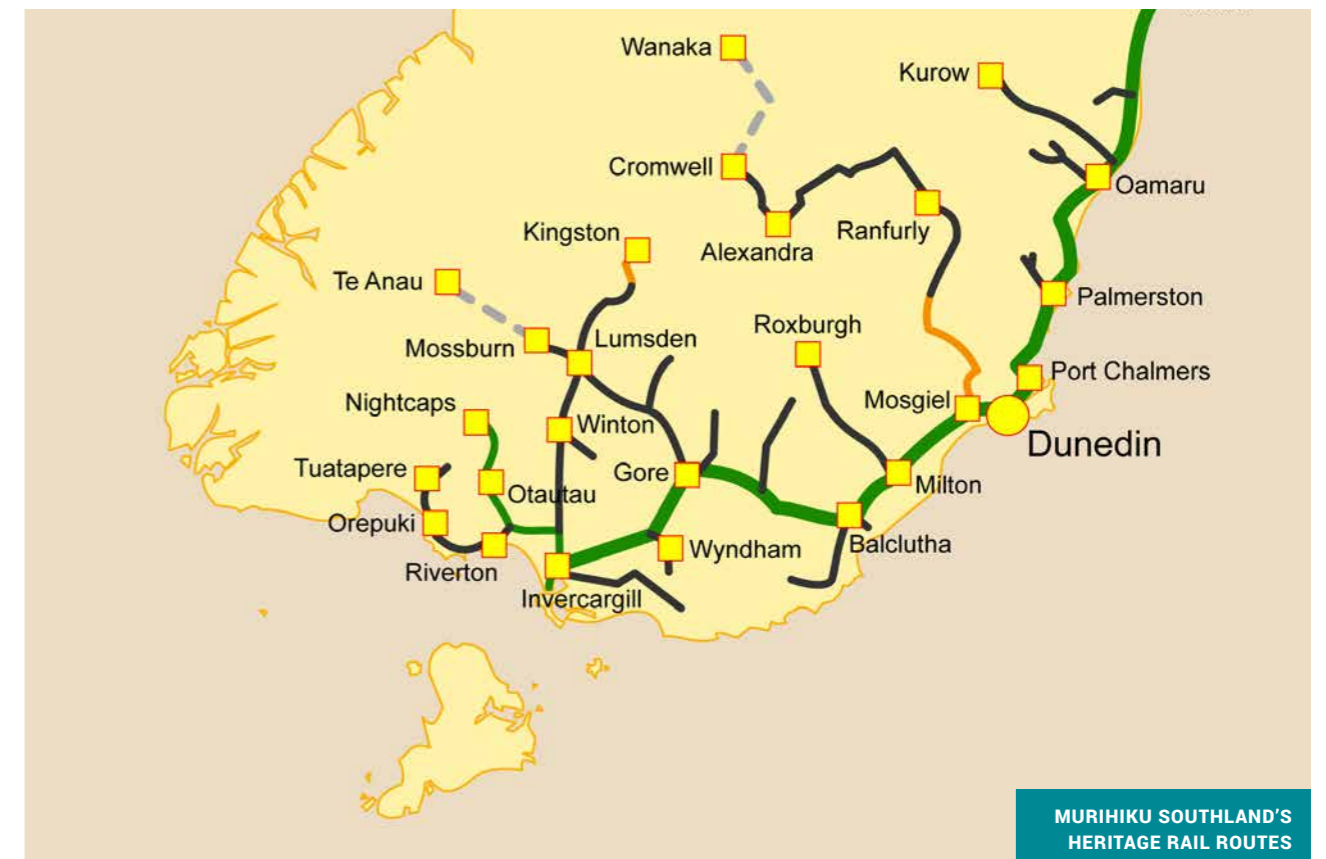
## MATAURA TRAIL PLANS

The Mataura Lions Club were interested in a Māruawai Gore to Mataura trail using floodbanks for some of the alignment. This was recommended to be ruled out by the Māruawai Gore District Trails Feasibility Study 2017. However, this would be a good strategic connection from northeast Murihiku Southland down towards Te Akau Tai Toka The Catlins, staying close to the Mataura River. It seems likely to be supported by Hokonui Rūnaka.

A small trail facility is planned for Tulloch Park in Mataura, partly to support the community's recreation opportunities as the pool is closed.

## HERITAGE ROUTES

As new trails are planned for Murihiku Southland, in addition to considering relationships, or reference to Ngāi Tahu ka ara tawhito (traditional travel) routes, the historic rail lines and old coach routes like the one around the Catlins coast provide another opportunity to explore.





## Cycling events and event routes

**With a comprehensive events strategy in place for the region there is no need for this cycle tourism opportunity assessment to duplicate. The recommended approach is to use the cycle tourism opportunity assessment to assist with shaping ideas for improved or new cycling events that fit within the existing events strategy.**

The Southland Murihiku Events Strategy 2020 - 2025 has four key goals:

1. Attract, retain, grow and enhance sustainable events.
2. Maximise community wellbeing: economic, social, cultural and environmental.
3. Encourage excellence in event management.
4. Provide a balanced event calendar.

Destination events that drive visitation are a key focus and of the destination events noted in the strategy, four are cycling related:

- Milford Mountain Classic (Feb)
- MLT Moonshine Trail (Feb)
- Te Anau Enduro (Mar)
- SBS Bank Tour of Southland (Oct/Nov) – this event has national and international reputation

In terms of media coverage, cycling events generally offer better opportunities to showcase a region's scenery, compared with an event in an indoor venue.

There are opportunities to increase leverage from these, and future events, such as providing media support to ensure they cover positive regional stories, creating opportunities for any influencer competitors or participants to post about Murihiku Southland, and pre-event promotion

of cycling experiences to encourage more spectators and supporters to visit and stay longer in the region.

Other cycling events that rotate within Aotearoa New Zealand could also be pitched for. The Skoda Secondary Schools Mountain Bike Nationals held at Motupōhue Bluff is a recent example. This event was held over four days in October and included downhill, enduro and cross country (long and short course) events. There were 628 entrants, plus managers, parents and supporters.

The event was run by Southland Mountain Bike Club and MTBNZ and involved contracting a professional event manager who trained multiple local representatives in running future mountain bike events, creating capability within the region.

Smaller local cycling and multi-sport events play a key role in fundraising and engaging the local community in trail projects. These events also have potential to build into larger events attracting visitors and increased profile for the region with current examples such as the Waikaia Flyer, Mt Linton Muster and Mossburn Downriver Dash.

There are also three cycling events that travel inter-regionally.

### Tour Aotearoa

This event enters Murihiku Southland using the first half of the ATMCT from Walter Peak, then stays off the state highway as much as possible from Lumsden to Waihōpai Invercargill, creating benefits for Dipton and Winton along the way.

It then follows Te Ara Taurapa from Waihōpai Invercargill to Motupōhue Bluff. With Murihiku Southland the end of the event it naturally encourages proud achievement social media posts from the region.

With Tour Aotearoa starting to receive increasing interest from overseas cyclists, this presents opportunities. These include increasing the number of entries for the main event, promoting the idea of completing the route through Murihiku Southland on an ongoing basis, and creating welcoming experiences for entrants, such as supporting an improved visitor experience at Stirling Point, which is identified as one of the projects within the Bluff Motupōhue 2020 Tourism Master plan.

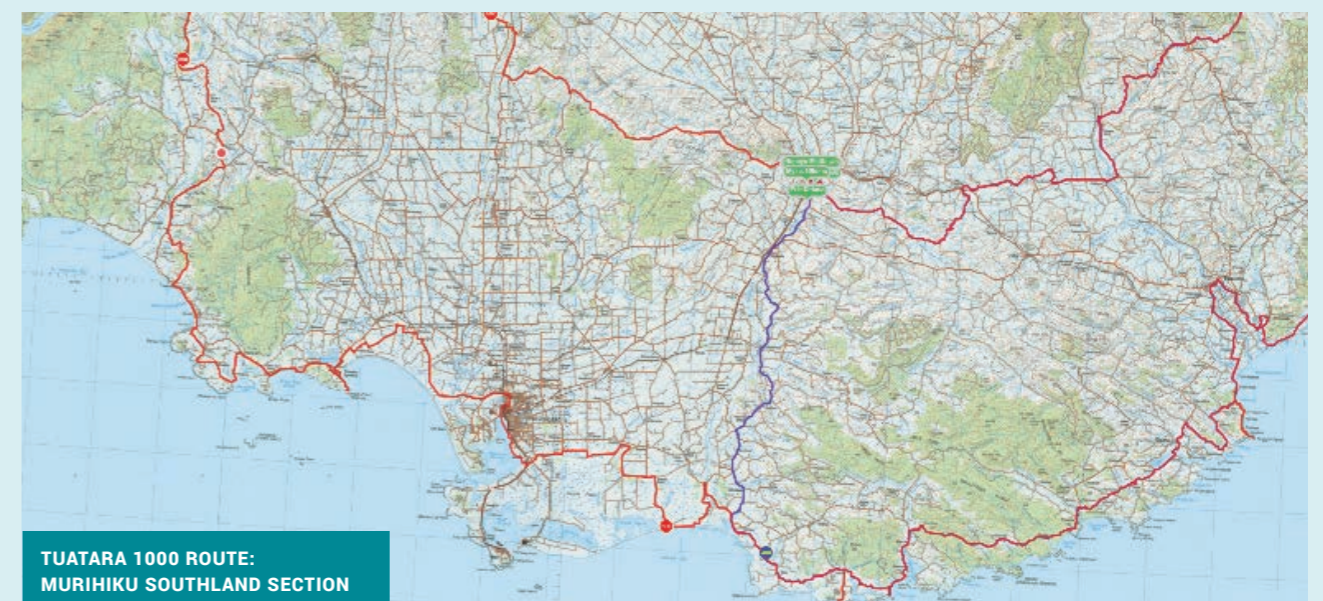
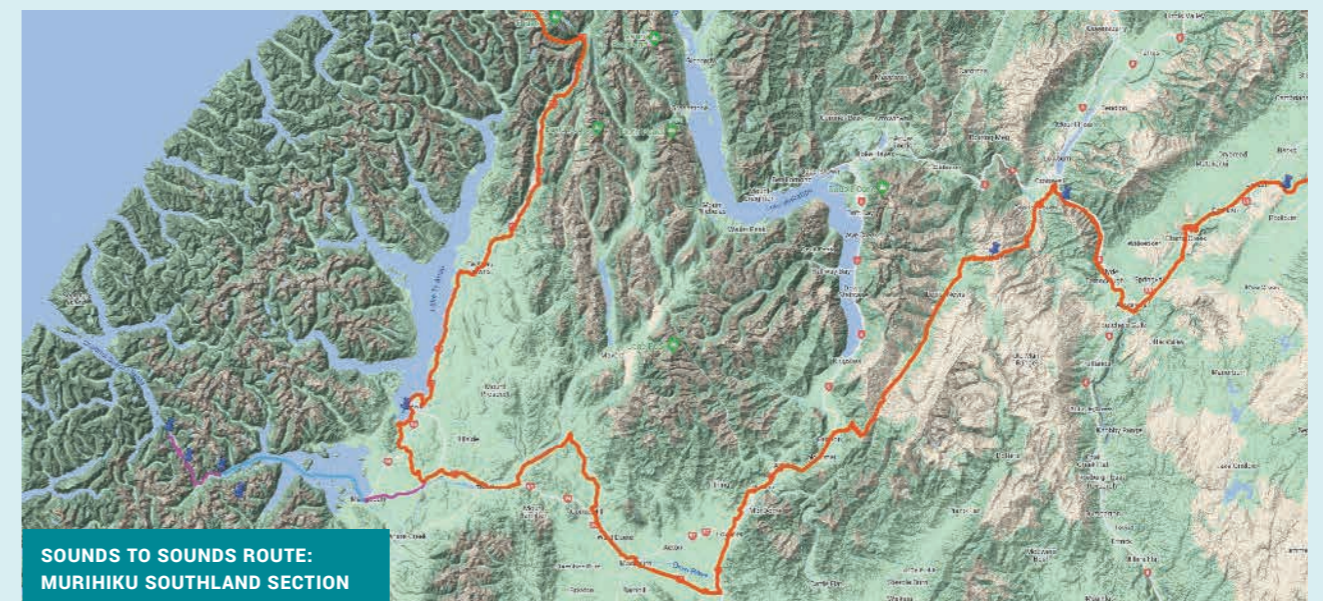
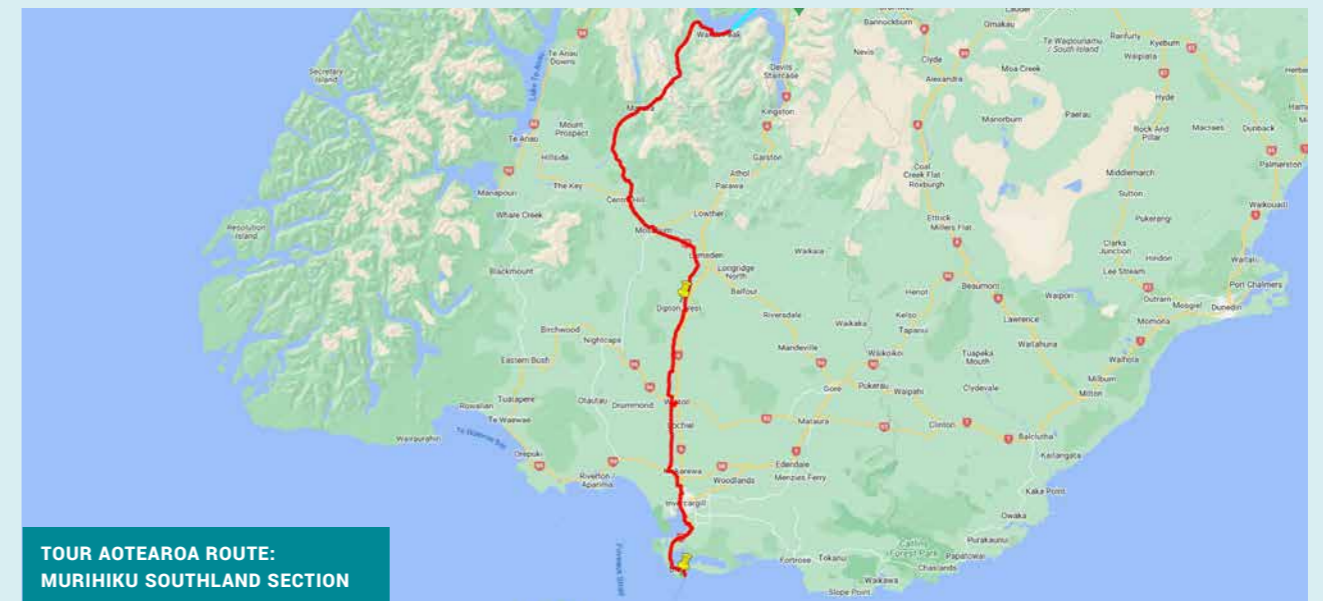
### Sounds to Sounds

This event starts in the Marlborough Sounds and makes its way down to Fiordland, coming over the Nevis Valley Road and finishes with options to Piopiotahi Milford Sound or Patea Doubtful Sound.

### Tuatara 1000

This relatively new bikepacking event was first held in 2021. With the event hub out of Māruawai Gore it uses gravel backroads to take in some of the best scenery out to Dunedin, around Te Akau Tai Toka The Catlins parallel to the Southern Scenic Route, on to Te Anau and then back through the Hokonui Hills to Māruawai Gore.

Currently it has low entrant numbers but has potential to become a 'must do' for the bikepackers market, including riding the route in their own time (unrelated to the event) with the ability to generate mainstream and social media profile for places along the route. It would be a low cost, and low risk from an event management perspective, after the route is designed, mapped and scripted.



## Otago regional trails and connecting to Murihiku Southland

### QUEENSTOWN CONNECTIONS TO MURIHIKU SOUTHLAND

An umbrella trust, Central Otago Queenstown Trail Network Trust has been formed which brings together the individual trail trusts working on linking the Central Otago trails to Queenstown and Wānaka.

Their priority project now is the \$26m Kawarau Gorge trail to create that linkage which will result in quality off-road trail (except for the boat section of the Roxburgh Gorge Trail) from Queenstown to Waiholā, and eventually through to Dunedin.

The Queenstown Trails Trust has recently released their 10-year strategy which has identified aspirational plans to connect with Fiordland and the rest of Murihiku Southland with potential connections including from Jacks Point, beside the Kingston Road (SH6), to ATMCT at Kingston.

A Queenstown Glenorchy Trail alliance (Queenstown Trails Trust, Glenorchy Trails Trust, Queenstown Mountain Bike Club and Southern Eco Trails Trust) sourced QLDC funding for a feasibility study on a 50km Queenstown to Glenorchy trail.

From Glenorchy, there is discussion of various route options to connect with Fiordland:

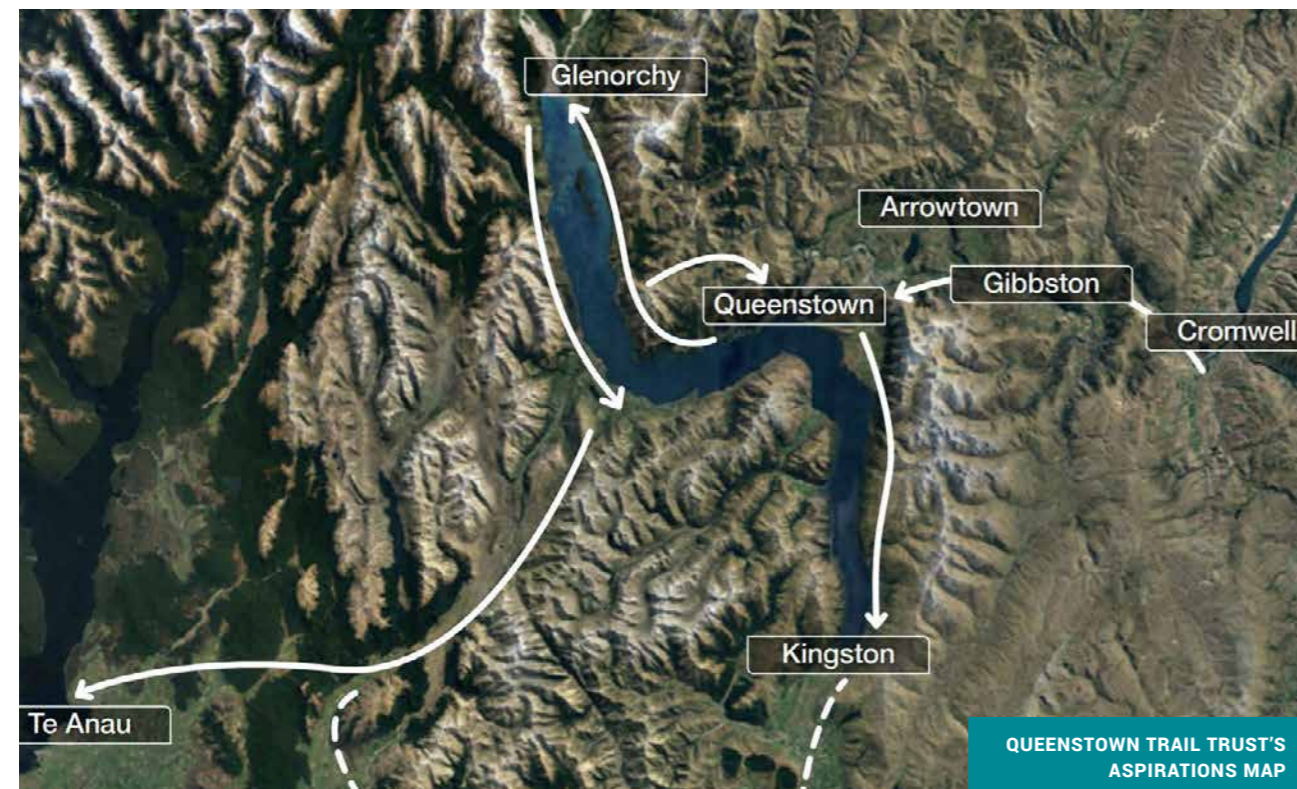
- Along the south side of Lake Wakatipu to the ATMCT at Von Road.
- Using the Greenstone Valley to connect to ATMCT at Mavora Lakes (as does Te Araroa trail).
- From Mavora Lakes, using Kiwiburn, Whitestone River and Upukerora Valley to connect to the planned Te Anau Downs Trail (potentially through Snowdon Forest).

Some of these are illustrated in Queenstown Trail Trust's aspirations map from their new strategic plan, released in 2023.

Queenstown is also focusing on building its offering, and profile, as a gravity mountain bike destination with Destination Queenstown having used TRC Tourism to develop a specific plan for this sector. This relates less to the trails of the Queenstown Trails Trust and more to the trail networks that Queenstown Mountain Bike Club separately develops, although the Trust's new Coronet Loop is relevant.

An increasing number of Aotearoa New Zealand leading mountain bike athletes are basing themselves in the Queenstown area and the nationals are being held again at Coronet Peak. Elements of the international Crankworx event have been extended to the South Island, including Central Otago.

**As Queenstown becomes even more of a magnet for this mountain bike segment, Murihiku Southland has the opportunity to attract these visitors to improved trail parks such as Motupōhue Bluff.**



### CENTRAL OTAGO CONNECTION OPPORTUNITIES

From the Central Otago district the two main connections being discussed are:

1. Nevis Road between Bannockburn (Lake Dunstan Trail) and Garston, which also passes Welcome Rock.
2. Alexandra to Waikaia, via the Old Man Range and Kopuawai Conservation area. This would connect the Roxburgh Gorge Trail and Otago Central Rail Trail.

Both of these would be closed in winter as they traverse high ranges and they are already used by more adventurous bikepackers. The connection between Old Man Range and Waikaia would need upgrade development to make it accessible to a wider range of cyclists but if this produced new singletrack it could become an IMBA Epic Trail.

### CLUTHA DISTRICT AND DUNEDIN TRAIL PROJECTS

A group in Tapanui, supported by Clutha District Council, is investigating trail opportunities in West Otago. This looks likely to focus initially on loop

trails into the countryside from Tapanui but the project is also considering longer term the connection to Beaumont and the Clutha Gold Trail and connections to Māruawai Gore district. These trail projects would then form part of the connection between Murihiku Southland and the Clutha Gold Trail, which in turn connect Central Otago and Dunedin.

Another group in Owaka is looking at a similar project in Te Akau Tai Toka The Catlins with local loop rides, road rides and whether a trail could run on, or close to, Te Akau Tai Toka The Catlins rail trail from Balclutha to Tahakopa. This, paired with any future Catlins coastal trail in south Catlins, could then create a further connection to Murihiku Southland and an off-road version of the Southern Scenic Route.

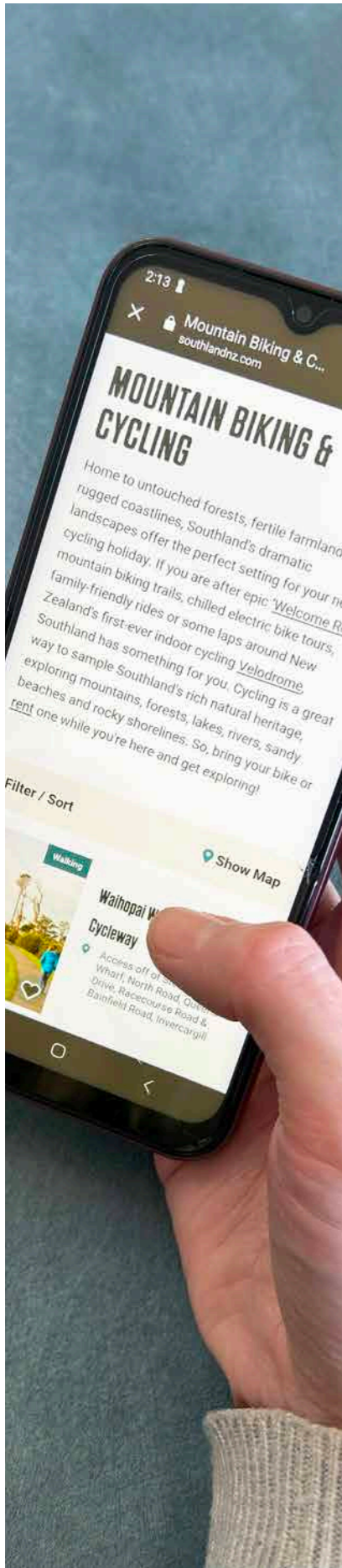
With the extension of the Clutha Gold Trail from Lawrence to Waiholā recently opened (August 2023), feasibility studies are underway for the connections right through to Mosgiel and into Dunedin City via a tunnel trail. This would complete the vision of Queenstown being connected to Dunedin. A feasibility study has recently been completed for the Dunedin Tracks Network Trust on a coastal communities cycleway connection from Dunedin north to Waikouaiti.

Waitaki District Council has also expressed interest in developing trail between Oamaru and Dunedin. This would result in all of the southern NZCT Great Rides being joined up.

### CENTRAL SOUTH TRAIL

Although the planned Central South trail network between Timaru and Tekapo does not connect to Murihiku Southland, it illustrates the developments in other regions vying for the cycle tourism market. This potential network would eventually link south to Oamaru thereby creating a massive loop with the Alps 2 Ocean.

If Murihiku Southland doesn't expand its trail network and connect to neighbouring regions over the next 5-10 years, it will become more of a void in the national cycle trail network and will risk missing out on the growing cycle tourism market.



## Marketing profile of Murihiku Southland cycle tourism

This next section provides a snapshot of some of the digital channels, which are mostly free, that could be improved to boost Murihiku Southland cycle tourism profile.

### REGIONAL TOURISM WEBSITE – SOUTHLANDNZ.COM

Since the Southland Cycling Strategy 2016 -2026, Great South has added significant content to the mountain biking and cycling page on southlandnz.com, with listings for most of the available rides and two 3-4 day itineraries.

However, the listings for each trail have limited photos, the maps only provide a single point locator and there is limited planning information.

This is one channel where improvements could be made at relatively low cost.

### NEW ZEALAND TOURISM WEBSITE – NEWZEALAND.COM

The cycling and mountain biking map tool on the Tourism New Zealand marketing website 100% Pure New Zealand only includes one product and/or experience for the region, which is Welcome Rock. This is because TNZ only includes operators with Qualmark accreditation. If a user clicks on Great Rides Around the Mountain Cycle Trail also shows.

Great South can assist operators and businesses in investigating how to become 'trade ready' or gain Qualmark endorsement.

### TRAILFORKS WEBSITE

This global website, owned by US-based Outside, is a go-to for mountain bikers showing GPS routes for individual trails and mountain bike

parks. It also includes other off-road cycling routes and is user-generated. Mountain bikers will use the mapping function to search around for potential trail centres.

For Murihiku Southland the ATMCT, L2L, Te Anau lakefront, Whitestone River routes, Te Ara Taurapa (Waihopai Invercargill-Motupohue Bluff), Waihopai riverbank and Hamilton Park (Māruawai Gore) are included.

For adventure trails routes, Bald Hill and Nevis Valley are highlighted. Mountain bike trail areas included are Perenuka, Te Anau Outflow, Welcome Rock, Sandy Point, Motupohue Bluff Hill and Hokonui.

It will be important to make sure new trails, such as Waikaia, are added when completed.

### MTB PROJECT WEBSITE

The MTB Project website, started by IMBA, is now owned by REI, one of the biggest outdoor recreational sellers in USA. Like Trailforks, it has user generated mapped trails globally with over 400 trails listed for Aotearoa New Zealand but none in Murihiku Southland.

While this site is not so popular with New Zealanders, if a visitor from the USA uses it to research Aotearoa New Zealand they will have an initial impression our region has limited options.

### ALL TRAILS WEBSITE

Another US based website covering all types of trails globally and comes up prominently within trail searches in Aotearoa New Zealand. It has limited free access which is enough to set refined criteria for searches, while paywalled access levels allow features such as 3D trail previews.

While it features trails not covered by other sites, there are major gaps

in Murihiku Southland and several factually incorrect components that would be worth correcting.

### POCKET GUIDE WEBSITE

This is a general tourism guide website with a lot of "listicle" content (e.g. best 5 or 10 things to do) and they have produced one on cycling in Murihiku Southland.

These types of media channels retain full editorial control and are therefore not bound to respond to suggested edits. However, it is worth submitting new story ideas that align with their content themes and if there is incomplete or erroneous content, a helpful edit or update may be accepted.

### BIKE MAGAZINE TYPE DIGITAL CHANNELS

As with all sports and recreational pursuits there are a myriad of print magazines running parallel websites and social media channels. Some are focused on equipment, but many include sections on new and interesting trails, facilities and destinations.

Examples are IMB, Bikepacker.com and Australian channel Flow Mountain Bike which also does features on Aotearoa New Zealand.



### OTAGO TRAILS COLLABORATIVE MARKETING

Central Otago Tourism led the establishment of a collaborative marketing initiative for all Otago regional trails. This is jointly funded by the Queenstown, Wānaka, Clutha, Central Otago and Dunedin RTOs and also engages the respective Trusts for each of the trails. It is not the same as the previously mentioned Central Otago Queenstown Trail Network Trust.

The collaborative marketing fund contracts a part-time marketing coordinator working to an agreed plan which has included media hosting, content development, advertising and a new Otago

Trail Hub website that focuses on stories and themes about the trails. This deliberately seeks to avoid overlapping the existing RTO and official trail websites and has been recently recognised nationally as one of Aotearoa New Zealand more innovative joint marketing initiatives.

As more trail connections are established between Murihiku Southland and Otago it may become appropriate to engage formally with this collaborative marketing initiative.

Such collaboration is already occurring between Great South and the Otago RTOs for specific marketing initiatives such as the Southern Scenic Route and the recently launched Southern Way touring route.

### FUTURE OPPORTUNITIES

Great South manages the Southland and Fiordland Regional Tourism Organisations and already carries out key functions for marketing the region such as content creation, promotion, research and monitoring and industry capability development.

It is suggested that a future opportunity could be to establish a dedicated cycle tourism development and promotion function within Great South, subject to appropriate resourcing, funding

and clear priorities set by Great South's shareholders.

To support this function it is suggested a cycle tourism partners group, made up of various cycling sector clubs and/or subject matter experts, is established to provide specialist knowledge about the best media, websites and social media channels to use to reach the various cycling interest group audiences.

This group could also advise on the development of cycle tourism routes, itineraries, experiences and event opportunities.

A potentially wider scope in working with the regional trail entities and organisations could also be considered (see page 65).

It is important to note that the cycle tourism development and promotion function within Great South would not have responsibility for 'cycling projects' which are councils or trail entities responsibilities, nor would it provide secretariat or executive functions for Ride Southland Governance Group for the Southland Cycling Strategy.



## MURHIKU SOUTHLAND POINTS OF DIFFERENCE

Fiordland's spectacular scenery is a pinnacle tourism attraction for Aotearoa New Zealand and is unsurpassed by other regions.

The breadth and contrast of scenery across Murihiku Southland is incredible – mountains, fiords, lakes, rivers, elevated floodbanks, classic rural farmland, rideable beaches, wetlands, coastal rainforest and more.

There are Ngāi Tahu ka ara tawhito (traditional travel routes) across the region and culture and heritage of the four Papatipu Rūnaka.

Murihiku Southland's food, art, heritage, dark sky, and agritourism offerings are also part of, and differentiate, the cycling experience.

Major drawcards of the SBS Bank Tour of Southland and the indoor velodrome.

The iconic image of Motupōhue Bluff trails with distinctive background views.

Murihiku Southland's rugged coastlines, lush forests and rolling green hinterland are a strong contrast to the scenery of Central Otago.



# Cycle tourism in the wider regional context

## Rūnaka perspective on trail development

**The process and engagement in developing the cycle tourism opportunity assessment coincided with several other projects that involved engagement with the region's four Papatipu Rūnaka.**

Awarua Rūnaka has been closely involved with the cultural narrative development along the Te Ara Taurapa trail and the Bluff Motupōhue 2020 Tourism Master plan which includes proposed trail projects. Discussions have also been held regarding potential for Te Akau Tai Toka The Catlins coastal trails and a connection from Awarua to Waituna and Fortrose, at conceptual level only.

Hokonui Rūnaka expressed support for more trails and a desire to be more involved in their planning, noting partnership with DOC and a relationship with Hokonui Bikers Club for the trails at Croydon Bush. Ōraka Aparima Rūnaka has already written in support of the Waiau River Trail project and the Riverton Trail group is in the process of engaging on their local trail ideas.

Waihōpai Rūnaka's relationships with Invercargill City Council and Environment Southland will inform projects in their rohe.

The cycle tourism opportunity assessment proposes to work with the four Papatipu Rūnaka, as well as Te Ao Marama Inc, to ensure that future trail planning and development seeks to align with their values and aspirations for Murihiku Southland.

These values and aspirations seek to encompass their broader aspirations such as:

- ➔ Preservation and recognition of Māori culture.
- ➔ Recognition of Ngāi Tahu history and Māori heritage.
- ➔ Developing cross-cultural relationships.
- ➔ Taking care of, and connection to, our environment (respecting our native land).
- ➔ Employment and training opportunities.



## Views of other stakeholders

### INVERCARGILL LICENSING TRUST AND ILT FOUNDATION

The ILT and ILT Foundation are key funders of events, community organisations and facilities, including the velodrome. An example project was their contribution towards the Te Ara Taurapa (Waihōpai Invercargill to Motupōhue Bluff) trail development.

For projects to receive support it is critical that the Waihōpai Invercargill communities can benefit from the investment.

### COMMUNITY TRUST SOUTH

Community Trust South has four Pou (pillars) to guide its funding activity. Under these Pou the key items that align with cycle tourism development are:

- Supporting active lifestyles.
- Community and economic development – 'working with communities to ensure they are connected, successful, resilient and dynamic'.

Alignment with local and regional development strategies and community development priorities is important, as is encouraging community cohesion through opportunities that bring people together and provide a sense of belonging.

As with ILT and ILT Foundation, projects should ensure they support and directly improve lifestyle, wellbeing and community connection, and where tourism is increased the economic benefits support the local community.

### ACTIVE SOUTHLAND

Active Southland has a Spaces and Places Strategy for Murihiku Southland and brings together many of the key stakeholder councils, funding bodies and sports bodies to consider projects, including cycling trails and facilities. It has been involved in the relocatable pump track project with Southland District Council and bike skills development.

Active Southland also has an Active Transport role, funded by Invercargill City Council and Southland District Council, undertaking research and promotion of Active Transport.

Active Southland is very supportive of a clearer set of criteria to be used for regional collective decision-making on funding and resourcing new projects.

### FISH AND GAME

Fish and Game's focus is on protecting species, habitat and recreational fishing access. As with any identified stakeholder, they need to be engaged early on with any potential trail concepts if they are in an area where there are sensitivities.



# Southland District Council community board plans

There are common threads across the various Southland District Council Community Board Plans including connected communities, volunteer development, environment, youth, aged mobility/transport, heritage and infrastructure. Many are aiming to improve or establish new community hubs.

## NORTHERN COMMUNITY BOARD

The community proposes to develop attractions and tourism products that encourage people to visit and stay in Northern Southland with a focus on cycling. It also notes it wants to ensure district-wide infrastructure can support the visitor industry e.g. EV chargers and accommodation.

There are no other specific cycling trails or facilities proposed, but it seeks to attract government funding and work with the ATMCT Trust, building on the trail opportunities.

## ARLUSSA COMMUNITY BOARD

The community has started work on a high-quality and progressive series of mountain bike trails and are looking to create more sporting events to increase visitation to the region.

The pump track in Balfour is being redeveloped.

## FIORDLAND COMMUNITY BOARD

The community focus is on developing products and experiences to attract high value visitors year-round and slowing them down.

Enhancing multi-purpose trails is one of the product development strands.

During the past two years, the community has seen a large increase in visitors travelling with their bikes.

Enhancing the multi-purpose trails in the area not only supports community wellbeing it also helps bring much-needed revenue to the area.

Other actions include:

- Work with the community to support desired changes to the Fiordland National Park Management Plan and work with DOC on developing recommendations for the new plan.
- Partner with local groups and DOC on opening more multi-purpose trails to develop connectivity between settlements.
- Prepare and implement a plan for cycling and pedestrian safety through Fiordland townships.
- A master plan for Te Anau, with cycling consideration to roading layouts and traffic management, cycling provision on roads, and connectivity between roads, tracks and trails.

## ŌRETI COMMUNITY BOARD

The community have noted a desire to develop cycle networks and walking tracks, along with local attractions and develop a promotion plan.

There remains interest in establishing a quality off-road shared path from Lumsden to Waihōpai Invercargill with the use of floodbanks

Feasibility work has previously been carried out on a pump track for Wallacetown.

## WALLACE TĀKITIMU COMMUNITY BOARD

The community has a desire to attract people, business and visitors resulting in the creation of a vibrant, exciting and prosperous area. They want to fill empty shops, develop attractions for visitors, and establish new events

to draw visitors to the area e.g. a triathlon, fishing competitions and family events.

Main trail project is the 7km rail route from Nightcaps to Ohai, however it still has the rail tracks on it.

Youth ideas in the plan include a bike track and skate park and the Nightcaps community are exploring a pump track at McGregor Park.

## TUATAPERE TE WAEWAE COMMUNITY BOARD

In addition to the Waiau River Trail proposal the Tuatapere community is keen to better promote the trails in and around the settlement with bike access where possible.

## ŌRAKA APARIMA COMMUNITY BOARD

The community notes pride in visitor growth with residents enjoying being part of a tourist hot spot and value the flow-on effect of having nice cafes and restaurants made possible through increased visitation.

The cycling community group project is discussed in the proposed trails section of this opportunity assessment with the Ōreti beach ride nearly all navigable even on high tide.

## WAIHŌPAI TOETOE COMMUNITY BOARD

A trail is being planned between Edendale and Wyndham, primarily to make a safe connection for the community and school kids. If this progresses it could form part of a regional connection between Māruawai Gore and Fortrose in future.

The Community Board is engaged in Te Akau Tai Toka The Catlins Community Tourism Strategy, under which coastal trail feasibility is currently being investigated.



## RAKIURA STEWART ISLAND COMMUNITY BOARD

The community acknowledges that tourism plays an important role but protecting the island for future generations is a priority and the community would like Rakiura Stewart Island to be a world leader in eco-tourism.

Given the community would like Rakiura Stewart Island to lead the world in eco-tourism, conservation and sustainability encouraging use of bikes and e-bikes to replace car trips would help to achieve this, especially where tourists might do so instead of renting a car.

## Related strategies and reports

### SOUTHLAND CYCLING STRATEGY 2016-2026

This comprehensive strategy covered all aspects of cycling with a strong emphasis on community cycling development and infrastructure; and was finalised in 2018. The vision statement was:

“Our aim is to improve cycling safety and participation so that the people of Southland and our visitors will gain in health, quality of life and appreciative use of their outstanding natural environment. Cycling opportunities will contribute to Southland’s socio-economic and population development by increasing the attractiveness of the region as a family friendly place to live and visit.”

The Strategy also covered cycle tourism including multi-day trails, mountain bike park development, signage, supporting operators to service the cycle tourism market, promotion and events. There are seven strategies for improvement with multiple actions recommended under each. They are:

1. Improve basic infrastructure to encourage more people to cycle.
2. Develop and promote a suite of high-quality cycling experiences.
3. Implement programmes to encourage people to cycle and raise safety awareness.
4. Support community cycling activities and participation-based events.
5. Assist the rejuvenation of competitive cycling events.
6. Support development of local cycle commissionable tourism products and partnerships.
7. Implement strong leadership, communication and cooperation.

The Strategy remains largely relevant now although there have been several developments and changes in parts of the cycle tourism market. Appendix 4 provides a status report on the recommended actions from the Strategy that were relevant to cycle tourism.

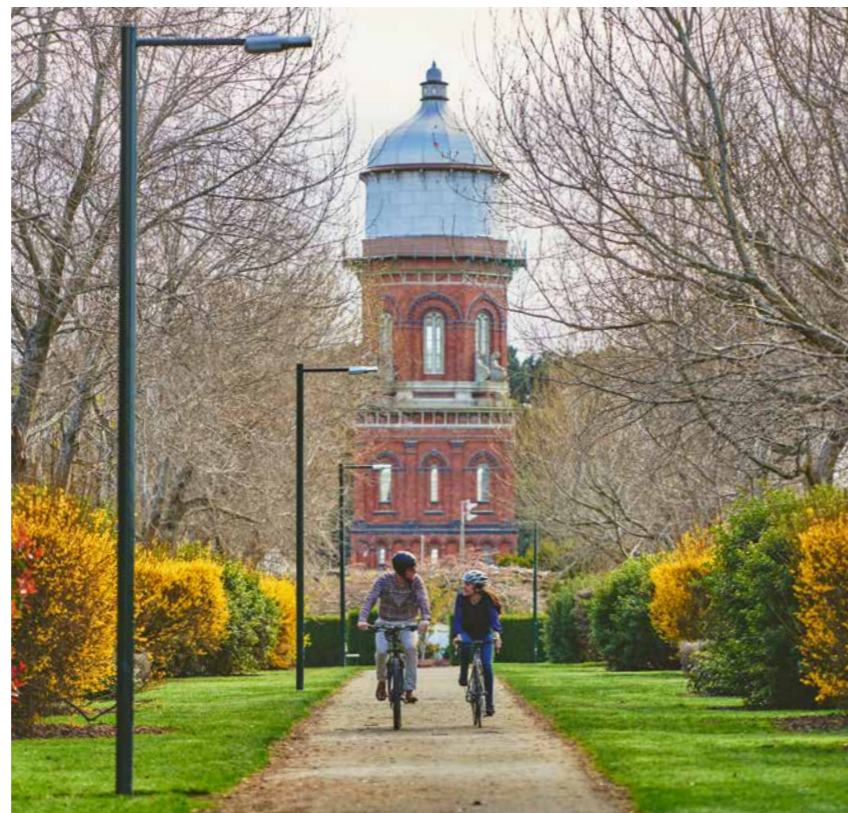
The 2016 Strategy included the following structure for delivering cycling for Murihiku Southland and had been agreed between the contributing councils:

- Establish a Governance Group, Ride Southland, which included Council representation from each of the four councils, DOC, Waka Kotahi NZTA, three community representatives and a Great South representative for facilitation and administration only.
- A Technical Group would sit under the Ride Southland Governance Group which included council staff, DOC and Waka Kotahi NZTA staff and Great South representation.

- Alongside the Ride Southland Governance Group was an Advisory Group with representatives from the various cycling clubs and stakeholder groups. The Strategy also recommended employing a Southland Cycling Coordinator to “implement strategy, support governance and pursue funding”.

Ride Southland Governance Group has met infrequently, with the last meeting August 2022. Southland District Council and Invercargill City Council have jointly funded an Active Transport Innovator role, via a contract with Active Southland’s Healthy Families Invercargill team, however, the scope of this role was active transport and therefore does not cover many of the proposed recommendations and actions from the 2016 Strategy.

Stakeholder interviews for the cycle tourism opportunity assessment highlight a degree of



frustration with the Ride Southland Governance Group, structure and mandate. Ultimately Ride Southland Governance Group had no core funding, no executive and no legal mandate to direct other organisations.

This cycle tourism opportunity assessment does not try to replace the existing 2016 Strategy, but focuses on cycle tourism where people visit specifically to do cycling activities; or they include cycling activities on a trip that has another main purpose, directly aligning with the mandate of the RTOs that Great South manages. There is significant overlap with the existing 2016 Strategy but topics such as cycling road safety, cycling skills development, community participation events and active transport are not significantly dealt

with in this cycle tourism opportunity assessment and will continue to be the focus of councils and recreation organisations directly. However the proposed trail projects outlined in this opportunity assessment would be used by, and benefit, local residents as much as visitors.

### CYCLE FIORDLAND OPPORTUNITIES STUDY 2014 SIGNAGE PLAN AND TRACK INVENTORY 2017

The Opportunities Study 2014, a comprehensive report from Simon Noble of Envisage NZ, focused on the opportunity to develop an overall brand and guidelines for signage, trail grading, and imagery for “Cycle Fiordland”. This included some form

of umbrella organisation with wider mandate than Fiordland Trails Trust and Te Anau Cycling Inc, which has not been progressed. It also included a very detailed plan for expanding, and better connecting, the network of cycle trails within Te Anau and the surrounding area. Progress has been made on only a minority of the opportunities identified.

The 2017 report, following the earlier 2014 study by the same author, had been considered in the Southland Cycling Strategy 2016 - 2026. While some of the content of both these studies is becoming dated they remain a useful and detailed overview of trail opportunities for Fiordland.

Fiordland Trails Trust has kept a summary of the projects, alongside responsible organisations and updated it regularly. Many of the projects require commitment from, and integration, to plans and budgets for Southland District Council; as well as plan reviews from DOC which have not happened.

The primary recommendation of the 2014 study was to prioritise what is now the Lake2Lake Trail. Some other key opportunities put forward were:

- Assessing a minimal upgrade of the Percy Saddle route but keeping it challenging for a niche adventurous market in recognition of the altitude and exposure risks (along with Borland Pass).
- A range of routes on the Kepler Track side of the upper Waiau.
- Various mountain bike options north of Te Anau, that were considered by TACI.
- Cycling in the Mavora Lakes area and connection from ATMCT to Te Anau.
- Enabling cycling on the Hollyford Track.

These reports obviously pre-date the Milford Opportunities Project which has shifted the focus to developing trails and accommodation in the Eglington Valley and Knob’s Flat and no plans for promoting cycling past The Divide or on the Hollyford.



## MĀRUAWAI GORE DISTRICT TRAILS FEASIBILITY STUDY 2017

This study, completed for Gore District Council by TRC Tourism, was really more of a trail opportunity plan than a feasibility study and considered walking, cycling and horse-riding trails. It proposed a network of trails in and around Māruawai Gore plus a loop trail in Mataura. It considered, but recommended against, trails from Māruawai Gore to Mataura and Māruawai Gore to Mandeville due to a mix of issues such as low estimated use, cost and land access. The study didn't give much consideration to the value these trails would provide in connecting the wider regional network from Lumsden down to Mataura and ultimately Te Akau Tai Toka The Catlins.

It appears that Gore District Council hasn't yet prioritised any of the recommendations. The main trail developments since 2017 are progress on the trail up Reaby Road, towards Croydon Bush and the mountain bike trails that Hokonui Bikers Club have developed. There are sections of rideable trail alongside

the Mataura River that were proposed in the TRC report as part of a "bridal loop".

The most recent cycle related project Gore District Council has been deliberating on was the concept of a cycle/pedestrian bridge in conjunction with the new cross-river water main structure, however this stalled due to objections. Hokonui Rūnaka is interested in more trails being developed including a connection to Mataura and a small trail facility is planned for Tulloch Park in Mataura, partly to support the community's recreation opportunities.

Strategic regional connections that need to be considered include

- Māruawai Gore to Tapanui, and Beaumont.
- Māruawai Gore to Lumsden, or Winton to connect with a Lumsden to Waihōpai Invercargill trail.
- Māruawai Gore to Mataura, and Fortrose.

Along with Waihōpai Invercargill and Te Anau, Māruawai Gore has a reasonable sized resident population and local trails do not need to rely on visitors. Trails could also potentially be supported from Waka Kotahi NZTA

with respect to improving safety, reducing vehicle movements and emissions.

The next suggested steps would be to test the community's support for trails and trail funding in the Gore District Council's Long Term Plan process late 2023/24; and meaningful engagement with Hokonui Rūnaka.

## BEYOND 2025 SOUTHLAND REGIONAL LONG TERM PLAN

The region's long-term plan, Beyond 2025 Southland, was launched in June 2023 and shares aspirations for the region's future economy, environment and people, and how those aspirations could be achieved.

Development of this plan included 16 workstreams within five areas of focus, which built on the previous work of the Southland Regional Development Strategy (SoRDS).

The Beyond 2025 Southland plan highlighted two key diversification opportunities for the region, aquaculture and tourism. It also identified focus areas that support the region's ability to achieve net zero emissions by 2050, with the

consideration of recommendations regarding low emission transport which are identified in existing strategies, such as the Murihiku Southland Regional Energy Strategy and Net Zero Southland report.

## MURIHIKU SOUTHLAND DESTINATION STRATEGY 2023-2029

The Murihiku Southland Destination Strategy (MSDS), launched in 2023, has been a revision of the original Southland Murihiku Destination Strategy released in 2019, which had already seen substantial progress with over two-thirds of its 68 recommendations either complete, in progress or under investigation.

The MSDS outlines a pathway forward for the region's tourism sector with a vision deeply grounded in the principles of destination management, including:

- Connecting and providing context for other initiatives and planning currently underway including the Milford Opportunities Project, Bluff Motupōhue 2020 Tourism Master Plan and Te Akau Tai Toka The Catlins Community Tourism Strategy.
- Seeking to align with developments in infrastructure, amenities and services which benefit both locals and visitors, including Waihōpai Invercargill CBD rejuvenation, more flights to the city and new hotels.
- Focusing on the sustainable development and management of the Murihiku Southland destination considering decarbonisation efforts and climate change.
- Ensuring the views of the region's communities are understood and at the heart of the overall approach.
- Acknowledging and strengthening our valued partnership with mana whenua which will ensure their perspectives and aspirations are at the heart of any future approach.

The pathway forward outlines 63 recommended projects, 24 priority

projects and five key enablers which are of critical importance to the recovery and growth of the region's tourism sector.

It focuses on key pillars and experiences most associated with Murihiku Southland in the minds of domestic and international travellers, and that are heavily linked to what we offer as a region. Cycling is a key pillar for the region and the MSDS proposes two key projects:

1. Develop infrastructure to support cycle tourism, with opportunities for the region assessed and progressed based on those of highest appeal to visitors.

Key actions:

- Establish stronger monitoring of trail usage to support decisions on cycle tourism development, including research on the economic impact of cycle trails.
- Establish guidelines and/or programmes to support and upskill businesses to provide best practice services and experiences around our cycle tourism trails and facilities.
- Advocate for best practice cycling infrastructure within our towns and urban centres.
- Finalise the cycle tourism opportunity assessment currently underway and progress recommended outcomes relating to infrastructure.

2. Position the region as a cycle tourism destination, with product promoted and shared – building the region's identity as a key cycling destination.

Key actions:

- Build Murihiku Southland distinctive identity as a cycle tourism destination.
- Progress implementation of the cycle tourism opportunity assessment recommended outcomes related to marketing.
- Create a mapped trail network

promoting our key cycle tourism experiences.

- Leverage cycle tourism to build Murihiku Southland other special interest sectors including food, art, dark skies and agritourism.

## SOUTHLAND REGIONAL SPACES AND PLACES

This strategy, led by Active Southland, aims to optimise a flexible and sustainable set of spaces and places to enable Southlanders to be more active. It notes that outdoor recreation activities accounted for most of the top 10 activities participated in by Murihiku Southland residents in the last 12 months including walking, gardening, running/jogging, cycling, tramping, and fishing. Providing a well-connected trail network in our townships and adventure trail experiences that connect Southlanders and visitors to nature will foster greater engagement in healthy and active living.

Among the key issues that are relevant to this cycle tourism opportunity assessment are:

- The region having many single use facilities.
- A lack of a regional planning and funding approach to facilities (coordinated regional process and criteria are recommended).
- The need to better leverage facilities for economic benefit and liveability (especially events, working in partnership with Great South and the Southland Murihiku Events Strategy).

The Spaces and Places Strategy covers a full range of venues, facilities and outdoor spaces where recreation occurs with cycle tourism facilities and events forming a small subset. The major focus is direct community benefit across all demographics. Tourism demand for a facility can make the difference in a project being viable, even if the prime target user is the local community.



## Government policy relating to cycle tourism

### DEPARTMENT OF CONSERVATION NATIONAL PARK PLANS AND GENERAL POLICY

Mountain biking is generally only permitted on formed roads within National Parks. A trial on potential impacts of mountain biking in National Parks, along with specific research, concluded that mountain biking did not have significant impacts in relation to walker/biker interactions.

The Arthur's Pass Management Plan was amended in 2012 to allow for the Poulter Valley to provide one of the few mountain bike tracks in a National Park. There is currently some controversy over seasonal access being restricted by the private landowner of White Station in relation to lambing and calving. Other examples are the seasonal mountain bike access to the Heaphy Track in Kahurangi National Park and the recently constructed Paparoa Track in Paparoa National Park.

Mountain bike trails have also been allowed for in the updated Tongariro National Park Plan, enabling Te Ara o Mangawhero (an extension of the existing Mountains to Sea Great Ride) development, which is beginning with existing heritage tram routes at lower altitude. It will gradually extend into higher rainforest and sub-alpine terrain enabling descent from the Massey Flat below the Turoa ski field base area. Local Iwi Ngāti Rangī has set up a company (Ruapehu Worx) to develop these trails.

These cases show that trails can gain consent within National Parks following due process. A review of the Fiordland National Park Management Plan is not currently planned and would take time to complete. The best opportunity for earlier action is through a separate process for government to directly enable the Milford Opportunities Project trails to proceed.

### SOUTHLAND MURIHIKU CONSERVATION MANAGEMENT STRATEGY

The Southland Murihiku Conservation Management Strategy (CMS) provides the framework for managing activities across Public Conservation Lands outside National Parks.

Combined with the higher-level General Policy, new bike trails cannot be approved beyond existing vehicle roads, unless they are specifically listed in the CMS as allowing bike access. There are very few places where this is the case. Much of this hinges around DOC using a Waka Kotahi NZTA definition of a bike as a vehicle. A change in the Conservation General Policy could resolve this but there has been no appetite within DOC to change general policy. This is causing an issue for the Western Southland Trails Trust and will affect other potential projects such as Te Akau Tai Toka The Catlins coast.

One option to address this is to do a partial review of the CMS, just for bike trails, as occurred for the Otago CMS during 2021-22. However, that process would likely take 1-2 years and may not be the best approach when the whole CMS is well overdue for review. As of spring 2023 DOC had re-embarked on a national process to simplify bike trail approval by identifying specific places where bike trails are excluded so that outside those places bike trail could be considered. They would still need to go through rigorous tests of consistency with values and outcomes and assessments of effects. This process was further put on hold in early October 2023 as wider consultation takes place.

All cycle tourism stakeholders, including Councils, Great South, Trail Trusts and organisations, will need to work constructively and proactively with DOC, Iwi and conservation and recreation groups to expedite a

process whereby bike trails can be considered in appropriate areas of Public Conservation Lands.

### NGĀ HAERENGA NZCT GREAT RIDES STRATEGIC DIRECTION

Ngā Haerenga NZCT is primarily focused on the resilience of its existing 23 designated Great Rides and lifting the quality of some trails so they all live up to Great Ride expectations. Ngā Haerenga NZCT also seeks to support collaboration between Trail Trusts and the supporting operators.

A further focus is stepping up their marketing of the 23 Great Rides, including working with TNZ – particularly in the Australian market. Their most recent research considered the concept of shorter options including Great Day Rides and Great Urban Rides, but this is not formally part of their strategy at this stage.

Ngā Haerenga NZCT capacity to be more proactive will be dependent on funding.

### WAKA KOTAHI NZTA CYCLING ACTION PLAN

This plan takes direction from the Government Policy Statement in Land Transport (GPS), which sets the government's priorities for land transport investment over the next 10-year period and how funding from the National Land Transport Fund (NLTF) will be allocated across different types of activities.

Strategic priorities under the 2021 GPS include better travel options (e.g. to support increased uptake of cycling) and climate change to support a reduction in carbon emissions.

The government will publish a new GPS for 2024-2033 in late 2023. The various cyclone events of early 2023 will see some re-prioritisation towards

repair and resilience of transport infrastructure in the affected regions.

The four strategic priorities in the plan are as follows:

1. Planning connected networks: Plan connected cycle networks which support safe, every day, local trips for everyone.
2. Streamlining our funding system: Optimise outcomes from investment in cycling and make funding policies and processes faster and easier to navigate.
3. Accelerating change on the ground: Accelerate widespread street changes and the rapid roll out of safe, connected cycle networks, and support innovative solutions that make cycling safer and more attractive.
4. Putting people at the heart of change: Build public support for street space reallocation, grow a Māori centred approach to walking and cycling, and encourage more people to ride.

The issue for Murihiku Southland is the focus for Waka Kotahi NZTA is in Aotearoa New Zealand's main urban centres, where it can impact the greatest number of people and trips. There is no longer any notable focus on tourism for Waka Kotahi NZTA investment. Murihiku Southland does not include any priority cities, so the region will need to make its own case, alongside Otago, to access a fair share of national funding.

However, the work that Invercargill City Council has been doing and the projects that have been recommended in and around Te Anau all align with Waka Kotahi NZTA urban cycling planning.

### GOVERNMENT FUNDING FOR CYCLE TOURISM INFRASTRUCTURE

Following the initial government investment in developing Ngā Haerenga NZCT Great Rides the establishment of the Provincial Growth Fund enabled many existing and new trail projects to source major government grants. However those funding streams have now ceased.

The Maintaining Great Rides fund of \$8m is allocated towards improving the standard of the 23 Great Rides and to repair extreme weather event damage. ATMCT is the only Murihiku Southland trail currently able to access this funding.

MBIE's Tourism Infrastructure Fund (TIF) is focused on helping councils with small ratepayer bases to provide adequate infrastructure where there is high tourism demand. The Bluff Hill Motupōhue Active Recreation project has successfully accessed TIF funding for enhanced carparking, toilets, signage and trail construction to create a meaningful upgrade of the whole experience. However, TIF funding is not currently sufficient to build new multi-day great rides.

The International Visitor Levy (IVL) sees \$35 collected from international visitors, other than Australians and some Pacific Island nations. This funding stream was severely impacted by closed borders during Covid. This is a valid source of funding on the basis that international (and domestic) visitors use the trails without paying. As of October 2023, \$5m from this fund has been allocated to Ngā Haerenga NZCT as part of the \$8m that has been annually provided to maintain existing Great Rides.

Despite this, funding is being invested in strategy and investigation projects for trails, under multi-pronged projects for Ruapekapeka Pa, Milford Opportunities Project and the Westland Tourism Initiatives Project.

For significant trail funding to come from the IVL this will need to be part of a nationwide push to shape the evolving policy. The funding is not contestable and is decided by the Ministers of Tourism and Conservation but Southland Murihiku could still pitch for funding in the meantime. Trail investment can fit under the pillar of Tourism Strategic Infrastructure and the investment priority of destination management planning and investment.

The more recently launched Tourism Innovation Fund from MBIE would technically only support some aspects of trail development and management which would potentially create significant advances in terms of technology efficiency or sustainability outcomes. Several trail projects are applying for this funding.

#### Climate Emergency Response Fund

Budget 2022 provided funding to Waka Kotahi NZTA to reduce emissions through the Climate Emergency Response Fund which will support Aotearoa New Zealand to transition to a low-emission economy.

The transport sector has an important role to play in delivering the Emissions Reduction Plan that calls for a 41% reduction in emissions (from 2019) within the transport sector by 2035.

There are three focus areas for reducing transport emissions:

1. Reduce car reliance, support people to walk/cycle/use public transport .
2. Rapidly adopt low-emissions vehicles and fuels.
3. Begin work now to decarbonise heavy transport and freight.

While the focus is on larger metro and provincial centres outside the region, investing in Murihiku Southland cycling infrastructure to support emissions reduction is in alignment with the fund and policy. Murihiku Southland should continue to pitch for government support on this basis.

## Regional trail organisations

**Regional collaboration will assist in the successful implementation of the cycle tourism opportunity assessment identified actions. This section provides commentary on the current landscape within Murihiku Southland and outlines the situation in the neighboring region, Queenstown Lakes.**

### TRAIL TRUSTS

Currently individual Trusts are being established for individual trail projects and then some like Fiordland Trail Trust are extending to additional trail projects. For cycle trails, there is currently ATMCT Trust, Fiordland Trails Trust, Western Southland Trails Trust and likely a new entity to be established for Riverton.

The ATMCT Trust was set up by, and has administrative support, from Southland District Council which owns and maintains the ATMCT asset. Te Ara Taurapa, the Waihōpai Invercargill to Motupōhue Bluff trail was completed by Environment Southland and Invercargill City

Council with no arm's length entity.

These Trust entities are all small and have relied significantly on volunteer time to date which is likely to become unsustainable as new trail projects evolve. The Trusts are also tackling similar problems and needing to procure similar services. Only some of these Trusts have been directly supported by Council which does present an inequity issue.

### MOUNTAIN BIKE ORGANISATIONS

There are regional mountain bike organisations looking after trails throughout the region. The Southland Mountain Bike Club works directly on Motupōhue Bluff Hill and Sandy Point and they actively partner with Waikaia Trails Trust, TACI and Hokonui Bikers Club.

There is some commonality between the mountain bike organisations and the cycle trail trusts including seeking funding, land access and consents. However trail construction

and marketing for mountain bike destinations is quite distinctive from those activities for cycle trails.

### RIDE SOUTHLAND GOVERNANCE GROUP

As mentioned earlier, the Ride Southland Governance Group was established to support and oversee the implementation of the Southland Cycling Strategy 2016 – 2026. Ride Southland Governance Group however had no core funding or legal mandate to direct implementation by other parties and has met infrequently over the last five years.

### QUEENSTOWN TRAILS TRUST

Queenstown Trails Trust is often presented as a good model to emulate, and it has certainly been one of the most successful in Aotearoa New Zealand. However, it started out as a walking trails organisation expanding into shared use trails. Its catchment is geographically much



smaller with fewer local community organisations than Murihiku Southland and is a subset of just one council rather than Murihiku Southland's three councils plus one regional council.

Queenstown Trails Trust also operates separately, but in cooperation, with Queenstown Mountain Bike Club which works on the mountain bike trail destinations. Queenstown Trails Trust does not cover Wānaka, which is still part of Queenstown Lakes District, and there is a separate trail trust for Glenorchy.

Although Queenstown Trails Trust is the primary cycle trails entity for Queenstown, and covers a network rather than just one trail, it does not cover all trails for the Queenstown Lakes District.

Given the above differences the model of the Queenstown Trails Trust could not be a simple replication for Murihiku Southland.

### FUTURE OPPORTUNITIES

While there are many benefits to forming a regional body from an economies of scale perspective, shared resources, a more coordinated effort in delivering regionally connected trail projects, maximising opportunities to access wider funding and coordinate regional advocacy at a local and national level, there are also wide-reaching considerations.

For example, local trusts such as Fiordland Trails Trust and Western Southland Trails Trust have strong community links which could be lost if an overarching regional trust replaced them. Furthermore, given the current limited and constrained community funding environment it may not be viable to resource a regional trust as well

as the local trusts.

It is important to remember the purpose of the cycle tourism opportunity assessment was not to provide an in-depth review and analysis of current organisations that are delivering trail projects, nor was it to identify specific actions for those organisations on potential future structures.

It is recommended that further investigation be undertaken to provide an assessment of the merits, issues and opportunities of a regional trails entity. This investigation should also include reviewing the Ride Southland Governance Group role and take into account the potential cycle tourism partners group (as outlined on page 51) in determining the scope of a regional trails entity.





**PART TWO:**  
**The Pathway  
Forward**

# Murihiku Southland cycle tourism opportunity

**Murihiku Southland can create a defensible position as a comprehensive and scenically diverse cycle tourism destination by upgrading and extending its easy cycle trail network and mountain bike park offering. The contrasting scenic landscapes provide a great point of difference from neighbouring regions and combined with the indoor velodrome and SBS Bank Tour of Southland, create a convincing add on or a return trip for visitors to Murihiku Southland's trails.**

Waihōpai Invercargill can seek to partially emulate Hawke's Bay's success by using its floodbanks and joining up a trail network in and around the city. While it doesn't have the same offering of weather, wineries, dining and galleries, connection to Motupōhue Bluff, Sandy Point and Riverton via Ōreti Beach helps to offset this.

As Waihōpai Invercargill trail use and profile builds up, there will be opportunities to align with the region's other key pillars, particularly food, heritage, arts, culture and dark skies. Māruawai Gore has a similar, albeit smaller-scale opportunity to do this, particularly leveraging trout fishing and the Hokonui Moonshine story.

The most critical opportunity for the region is to create 2-3 days' worth of grade 1-3 linear or loop cycle trail in at least one location and then ultimately a complete trail network which traverses the key destinations within the region and connects with neighbouring regions.

Other opportunities include:

- ⊕ An ability to ride off-road, but close to the Southern Scenic Route, with further connections inland.
- ⊕ A nationally significant mountain bike gravity park - with 30-50km of grade 2-5 trails, with a significant share of grade 3 flow and air-flow descent. This park should also house a skills area, an option for shuttle uplift (eventually electric) and base facilities including carpark, washdown, water station, toilets and preferably a cafe or food truck.
- ⊕ City accessed network that connects accommodation, hospitality, parks, galleries and adjacent hinterland scenery, that is easy to navigate using maps (both digital and printed) and wayfinding signage.
- ⊕ Choice of bike hire in each key trail destination.
- ⊕ Bike friendly accommodation with facilities and services designed specifically for the cycle tourism market.
- ⊕ Regular shuttle services, and tour operators, providing all-inclusive tour packages from affordable to luxury.
- ⊕ Iconic gravel/bikepacking routes.
- ⊕ Potential IMBA Epic Trail – a challenging backcountry adventure route.
- ⊕ Selection of contemporary and distinctive pump tracks across the region's towns.

Drawing on the findings from the opportunity assessment a vision and five goals have been identified. Each goal has associated focuses and clear actions detailing how it will contribute to the development of Murihiku Southland as a must-visit cycling destination.

The successful implementation of the opportunities identified in this assessment will require strong regional partnerships and collaboration, with many of the identified next steps requiring long-term input and support from a number stakeholders.

## GOAL 1

Develop a comprehensive regional network of cycling trails and facilities to make Murihiku Southland a must-visit cycling destination.

## GOAL 2

Support the industry and councils to develop best practice support services and facilities that provide exceptional cycle tourism experiences.

## GOAL 3

Position Murihiku Southland as a distinctive cycling destination supported by the most diverse range of landscapes in Aotearoa New Zealand.

## GOAL 4

Promote Murihiku Southland cycle tourism to target market segments using local experts and specialist channels.

## GOAL 5

Encourage collaborative partnerships between councils, stakeholders, community groups and organisations that are delivering the vision of a comprehensive regional trails network.

## VISION

**Murihiku Southland is recognised as a must-visit cycling destination with a comprehensive regional network of trails and mountain bike parks that connect our communities and visitors, broaden the economy, showcase the most diverse range of landscapes in Aotearoa New Zealand, and support ecological restoration and a net zero carbon future.**

## Summary of next steps

All identified actions within the five goals will be subject to appropriate prioritisation and required level of resource and funding achieved. Key stakeholders has been initially identified however it is anticipated further scoping of the relevant action will determine the final stakeholders and relevant lead organisation.

### GOAL 1

#### Develop a comprehensive regional network of cycling trails and facilities to make Murihiku Southland a must-visit cycling destination.

Taking a staged approach, develop a full network of easy grade off-road trails linking to Central Otago and Queenstown Lakes and expanding the mountain bike park offering.

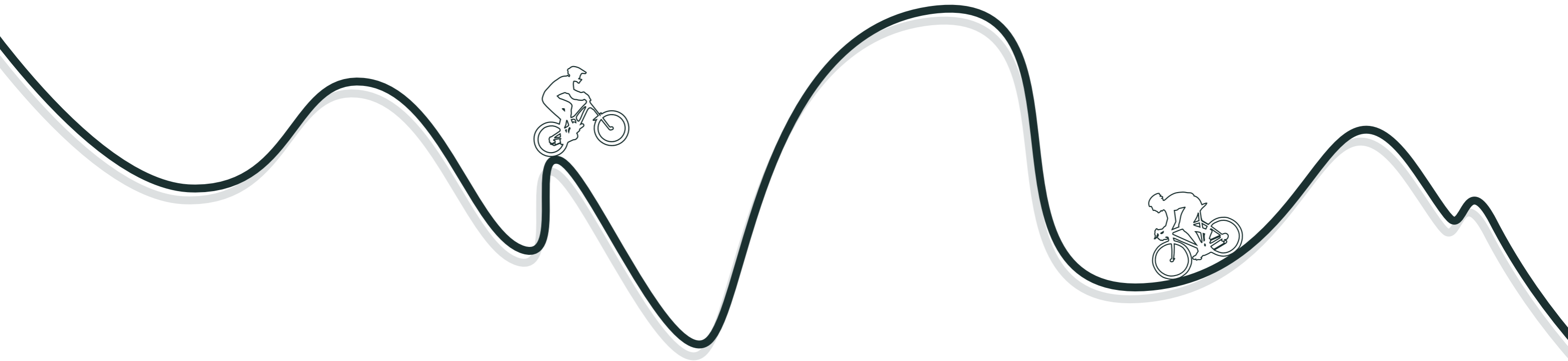
FOCUS	ACTION	KEY OUTCOME	KEY STAKEHOLDERS
Strategic planning with councils to enable cycle trail development	As local and regional statutory Resource Management Act (RMA) plans are updated, review and propose amendments.	Plans are reviewed and amendments suggested where trail consenting is restricted, for example District Plans, Water and Land Plan, and Regional Coastal Plan.	All councils Te Ao Marama Inc
	Ensure that cycling projects and funding are considered and supported in the respective Council's 2023-33 Long Term Plans, as well as the Otago Southland Regional Land Transport Plan.	That the respective Council's Long Term Plans and Activity Plans support cycle tourism growth, ensuring local funding is available to leverage central government funding programmes. Ensure the Otago Southland Regional Land Transport Plan increases prioritisation of cycling projects, funding and safety enhancements.	All councils
	Encourage continued cycling enhancements to safety and wayfinding through respective transport and recreation plans.	That road widening, road marking, separated lanes, crossing treatments and signage are prioritised within the respective transport and recreation plans.	All councils
	Review of the Fiordland National Park Plan that enables consideration of appropriate cycle trails.	Clearly understand the anticipated timeframe of the review of the Fiordland National Park plan along with the process required for consideration of cycle trail developments.	DOC/Southland Conservation Board Ngāi Tahu Ngā Papatipu Rūnaka ki Murihiku All councils Great South Te Ao Marama Inc Various interest groups
	A review, or partial review, of the Murihiku Southland CMS and/or revision of the Conservation General Policy.	Clearly understand the anticipated timeframe of the review of the CMS along with the process required for consideration of cycle trail developments.	DOC/Southland Conservation Board Ngā Papatipu Rūnaka ki Murihiku All councils Great South Te Ao Marama Inc Various interest groups
	Establish a criteria for ranking proposed trail projects with an associated weighted attributes model.	A regional model for strategic prioritisation and investment in cycle tourism trails and infrastructure is agreed (an example is suggested in Appendix 2).	All councils Great South Various interest groups Fundors

Partner with iwi in trail planning and development	Working with Ngā Papatipu Rūnaka ki Murihiku to ensure that trail planning, and development seeks to recognise cultural history and heritage.	Ngā Papatipu Rūnaka ki Murihiku have a genuine sense of partnership in trail planning and development.	Ngā Papatipu Rūnaka ki Murihiku All councils Great South Te Ao Marama Inc Various interest groups
	Ensure trail Pou (markers), signage and interpretation share iwi stories and reflect sites of significance.	Share Murihiku Southland Māori heritage and history in cycle trail and mountain bike park developments, where appropriate.	Ngā Papatipu Rūnaka ki Murihiku All councils Great South Te Ao Marama Inc Various interest groups
Improve and extend Murihiku Southland's existing off-road multi-day trails network	<b>Around The Mountains Cycle Trail Trust:</b> Support investigation and feasibility of an off-road trail option from Mavora Lakes to Centre Hill. Support investigation into potential accommodation and/or power supply at Mavora Lakes.	Options are investigated to inform decision making.	ATMCT Trust Ngā Papatipu Rūnaka ki Murihiku SDC DOC/Southland Conservation Board Te Ao Marama Inc
	<b>Fiordland Trails Trust:</b> Support Fiordland Trails Trust to create 2-3 days' worth of trails based around Te Anau and surrounds, with Te Anau to Te Anau Downs as a priority followed by Whitestone River.	Creation of 2-3 days' worth of trails with a hub in Te Anau and connection to Milford Opportunities Projects proposed trails.	FTT SDC/Fiordland Community Board DOC/Southland Conservation Board MOP Te Ao Marama Inc
	<b>Milford Opportunities Project:</b> Support investigations into proposed cycle trails and associated accommodation in the Eglington Valley area.	Milford Opportunities Project trails are completed and extend into the regional network with a view to connecting at Te Anau Downs.	MOP SDC/Fiordland Community Board DOC/Southland Conservation Board FTT Te Ao Marama Inc
	<b>Western Southland Trails Trust:</b> Support the Trust in seeking feasibility funding for the Waiau River Trail (Manapouri to Te Waewae Bay).	Feasibility study is completed for the Waiau River Trail project.	Western Southland Trails Trust SDC ES Te Ao Marama Inc
	<b>Riverton Aparima Trails Group:</b> Support investigation of a Riverton-Colac Bay trail.	Investigation is completed on a Riverton-Colac Bay trail.	Riverton Aparima Trail Group SDC ES Te Ao Marama Inc
	<b>Ōreti Beach to Riverton:</b> Investigation of a trail behind the dunes from Ōreti Beach to Riverton.	Investigation is completed on the Ōreti Beach to Riverton trail creating an all-weather/tide alternative to the existing beach route.	Various interest groups SDC ICC ES
	<b>Advocate for review, and consideration, of previous completed reports and recommendations on cycling improvements for Te Anau.</b>	Te Anau urban cycling improvements are considered as part of the Te Anau basin development plan currently underway.	SDC/Fiordland Community Board FTT
<b>Review the Māruawai Gore District Trails Feasibility Study.</b>	Māruawai Gore District Trails Feasibility Study is reviewed taking into account recent developments with the watermain/ bridge project and potential floodbank trails connection to Mataura.	GDC Hokonui Rūnaka ES Hokonui Bikes Club	
<b>Work proactively with neighbouring councils and cycle trusts to encourage inter-regional connections.</b>	Murihiku Southland is connected to the wider national cycle network with cycle visitor flows direct from neighbouring regions.	All councils Various interest groups	

FOCUS	ACTION	KEY OUTCOME	KEY STAKEHOLDERS
<b>Develop other cycling routes</b>	<b>Investigation of the long-term options to create connections from Te Waewae Bay to Colac Bay and Awarua to Waituna to Fortrose.</b>	Investigation completed and direction provided on the viability of these options and connection into the wider regional trail network.	Various interest groups
	<b>Investigate a modest upgrade of the Percy Saddle route, including trail markers.</b>	Enable the route to be more rideable but maintaining it as an advanced adventure experience.	Various interest groups
	<b>Investigation of a potential IMBA accredited Epic trail.</b>	Longwoods Bald Hill investigation is completed as a potential Epic Trail as the first option.	Various interest groups
	<b>Explore enhancements and appropriate extensions to the rideable routes on Rakiura Stewart Island along with expanded hire facilities.</b>	Cycle routes have been explored and next steps have been identified.	SDC/Rakiura Stewart Island Community Board Great South
<b>Develop Waihōpai Invercargill as a cycling city</b>	<b>Develop Waihōpai Invercargill as a cycling city.</b>	Waihōpai Invercargill is recognised as a great cycling city with commuting and recreational trails through the city centre and parks, and surrounding floodbank trails. One hour, half day and full day ride options are available.	ICC Various interest groups
<b>Enhance other community cycling infrastructure and facilities</b>	<b>Pump Tracks:</b> <b>When identified, support and promote the development of multi-user pump tracks with differentiate design and layout.</b>	Community bike facilities vary between towns and become a reason to visit, encouraging locals and visitors to try multiple locations increasing dispersal around the region.	All councils Community Boards Various interest groups Active Southland

<b>Improve and develop more mountain bike parks to become a multi-day mountain bike park destination</b>	<b>Motupōhue Bluff Hill:</b> <b>Continue with planned upgrades, enhancements and expansion of trails.</b>	Broaden Murihiku Southland's mountain bike park offering by increasing contemporary designs and family/beginner and intermediate flow trails, which encourages longer length of stay and greater dispersal around the region.	SMBC Awarua Rūnaka ICC
	<b>Sandy Point:</b> <b>Support the maintenance and improvement as a cross country mountain bike park and cyclocross (CX) venue.</b>	Broaden Murihiku Southland's mountain bike park offering by increasing contemporary designs and family/beginner and intermediate flow trails, which encourages longer length of stay and greater dispersal around the region.	SMBC ICC
	<b>Waikaia Trails Trust:</b> <b>Support mountain bike and pump track project.</b>	Broaden Murihiku Southland's mountain bike park offering by increasing contemporary designs and family/beginner and intermediate flow trails, which encourages longer length of stay and greater dispersal around the region.	Waikaia Trails Trust SMBC SDC
	<b>Hokonui Hills:</b> <b>Continue to support the new concession in place with DOC in delivering sustainable trail maintenance and environmental activities.</b> <b>Investigate longer-term aspirations of further quality and grade ranges of trails with a vision to become a dual mountain bike destination with Waikaia.</b>	Broaden Murihiku Southland's mountain bike park offering by increasing contemporary designs and family/beginner and intermediate flow trails, which encourages longer length of stay and greater dispersal around the region.	Hokonui Bikers Club SMBC Hokonui Rūnaka GDC DOC/Southland Conservation Board
	<b>Welcome Rock:</b> <b>Support any future investigation of expanding the current trail network.</b>	Broaden Murihiku Southland's mountain bike park offering by increasing contemporary designs and family/beginner and intermediate flow trails, which encourages longer length of stay and greater dispersal around the region.	Welcome Rock owners
	<b>Support continued investigation for a more comprehensive mountain bike trail destination near Te Anau.</b>	Broaden Murihiku Southland's mountain bike park offering by increasing contemporary designs and family/beginner and intermediate flow trails, which encourages longer length of stay and greater dispersal around the region.	TACI SDC/Fiordland Community Board
<b>Continue to develop data and insights to support robust decision making on cycle tourism developments</b>	<b>Encourage increased trail use monitoring (trail counters) and user research such as economic impact assessments of cycle trail and mountain bike park developments.</b>	Up to date data and insights informs future trail planning and decision making.	All councils Great South Various interest groups
	<b>Ensure sharing of existing trail's data, where appropriate to inform a regional picture of use across the existing trail network.</b>	Support informed decision making on future trail developments	All councils Great South Various interest groups
	<b>Utilise leading edge technology (apps) to understand trail use, support the riding experience and facilitate funding towards trails and promotion.</b>	Provide helpful data and insights to improve the overall experience and navigation of trails, along with the ability to donate to a trail trust, putting Murihiku Southland at the leading edge of technology use in this sector (e.g. Strava or Trailforks apps).	All councils Great South Various interest groups
	<b>Build up an evidence base of sustainable trail construction and maintenance cases.</b>	Provide key supporting information for submissions on new trail consenting.	
	<b>Continue testing user demand within communities with temporary installation of the relocatable pump track.</b>	Usage and data from the temporary installation within communities will help inform future decision making.	All councils Community Boards Various interest groups Active Southland





## GOAL 2

### Support the industry and councils to develop best practice support services and facilities that provide exceptional cycle tourism experiences.

Develop tools, resources and programmes that increase industry capability and capacity, and highlight what different cycle tourism segments require. Work with Councils to ensure they are integrating bike friendly facilities and improvements in their long term planning processes.

FOCUS	ACTION	KEY OUTCOME	KEY STAKEHOLDERS
<b>Industry capability and capacity development</b>	<b>Develop a cycle tourism toolkit.</b>	Cycle tourism toolkit is developed to support the industry to become bike friendly, catering for cycle tour operators, bike hire, shuttle, accommodation, hospitality and retail.	Great South
	<b>Develop and deliver workshops promoting the use of the cycle tourism toolkit and becoming trade ready with Qualmark accreditation.</b>	Workshops are developed and delivered to upskill operators and businesses associated with cycle tourism, with more businesses becoming trade ready and Qualmark accredited.	Great South
	<b>Actively encourage cycle tourism related businesses to participate in the Murihiku Southland Sustainable Tourism Programme.</b>	Increase participation in the Murihiku Southland Sustainable Tourism Programme, which supports businesses to lower carbon emissions and improve their sustainability.	Great South
	<b>Encourage development of bike hire with a focus on Waihōpai Invercargill and the business traveller market.</b>	Increase offering of bike hire within Waihōpai Invercargill enabling the business traveller to ride trails after work hours.	Cycle tourism businesses/operators
<b>Bike friendly facilities</b>	<b>Encourage the installation of bike friendly facilities at strategic locations for visitors and residents.</b>	Increased bike friendly stops throughout Murihiku Southland that include bike racks, locking facilities and water stations.	All councils Community Boards Active Southland
	<b>Investigate the establishment of a local WORD (youth mountain bike development) or similar programme.</b>	Strong youth programme which gains profile for Murihiku Southland, attracting return visitation.	Active Southland Youth organisations Various interest groups

## GOAL 3

### Position Murihiku Southland as a distinctive cycling destination supported by the most diverse range of landscapes in Aotearoa New Zealand.

Integrate the comprehensive regional story “Murihiku - The South Land” across all segments of the cycle tourism market, showcasing our diverse range of landscapes and highlighting our points of difference to other regions.

FOCUS	ACTION	KEY OUTCOME	KEY STAKEHOLDERS
<b>Regional positioning</b>	<b>Integrating Murihiku – The South Land into all cycle tourism positioning to ensure alignment with the overall regional brand.</b>	A strong regional cycle tourism proposition, differentiated from other regions is developed, celebrating our unique differences.	Great South
	<b>Leverage cycle tourism opportunities which build on Murihiku Southland key pillars including food, art, dark skies and agritourism.</b>	Ensure connection with the region's key pillars and the wider Murihiku Southland Destination Strategy implementation.	Great South
<b>Events</b>	<b>Continue to support and promote cycling events which attract visitors and increase length of stay.</b>	Cycle events are held, which generate increased visitation and external profile.	Various interest groups Great South
	<b>Leverage promotional opportunities from the key destination event, SBS Bank Tour of Southland, which add to the profile of the region and increase length of stay.</b>	Investigate the establishment of a supporters ride during the event and promote competition routes as a ‘must-do’ for road bike enthusiasts. Place media to capture iconic locations and showcase the diverse landscapes on offer.	Cycling Southland Great South
<b>Route developments</b>	<b>Review the officially mapped cycle touring/ bikepacking routes.</b>	Increase the profile of recognisable and valuable road touring/bikepacking routes to better connect riders with local towns and services, showcasing our diverse natural landscapes (particularly the Northern Southland route).	All councils Great South Waka Kotahi NZTA

## GOAL 4

### Promote Murihiku Southland cycle tourism to target market segments using local experts and specialist channels.

Develop a comprehensive hub of cycling content that can be developed into campaigns targeting specific market segments. Engage with third-party channels, including ride mapping websites and social media influencers, in promoting the region's cycle tourism proposition.

FOCUS	ACTION	KEY OUTCOME	KEY STAKEHOLDERS
Sector expert and partner group development	Investigate a dedicated cycle tourism development and promotion function within Great South.	Investigation completed on the viability and priority of establishing a development and promotion function within Great South, outlining required resourcing and funding.	Great South
	Investigate the development of a cycle tourism partners group.	Investigation completed on developing a cycle tourism partners network, including scope and in consideration of potential regional trails entity (see Goal 5 focus area).	Great South
Cycling content and campaign delivery	Review the mountain biking and cycling section of the regional destination website southlandnz.com.	The mountain biking and cycling section becomes a comprehensive cycle tourism digital hub that is continually updated and drives visitors to specific trail websites (e.g. ATMCT, L2L) for more detail.	Great South Various interest groups
	Review Murihiku Southland cycling tourism content on 3rd party digital channels.	Digital channels identified and updated to correct errors and ensure consistency of messaging.	Great South
	Continue to expand and maintain the existing media library which profiles Murihiku Southland's cycle experiences, facilities and scenery.	Ongoing plan and review process to identify gaps and opportunities in the media library, which includes high-quality video and still images.	Great South
	Develop content for a series of gravel/ bikepacking routes	Content is published using existing backroads which have associated GPS mapping, imagery and trail descriptions.	Great South Various interest groups
	Develop a specific content section and associated mapping for community bike facilities.	Community bike facilities profiled throughout Murihiku Southland, including pump tracks and BMX tracks, so that families can easily include them in their trip plans.	All councils Great South
	Continue to develop a cycling targeted marketing and campaign programme.	Campaigns planned (including digital and social media) with associated marketing, ensuring experiences are promoted as sustainable, low emission activities for the visitor market. Content is optimised for emerging AI functions. Cycle media database established.	Great South
	Continue to develop data and insights to understand the cycle tourism market segments visiting Murihiku Southland.	Cycle tourism market segments are better understood with data and insights across key measures i.e. motivations and perceptions, visitor demographics, satisfaction levels and economic benefit.	Great South

## GOAL 5

### Encourage collaborative partnerships between councils, stakeholders, community groups and organisations that are delivering the vision of a comprehensive regional trails network.

A number of regional organisations and stakeholder groups will ultimately be the delivery agents of Murihiku Southland's cycle tourism assets, facilities and services. To realise the vision of a comprehensive regional trails network a regional trail entity should be investigated.

FOCUS	ACTION	KEY OUTCOME	KEY STAKEHOLDERS
Sector collaboration	Investigation undertaken into a potential regional trails entity.	Investigation completed on a regional trails entity, including scope, with consideration of the potential cycle tourism partners group (see Goal 4 focus area) and Ride Southland Governance Group.	All councils Great South Various interest groups
	Advocate to gain clarity of Ngā Haere NZCT future policy and process on acceptance of additional official Great Rides.	Clarity and understanding on the requirements and opportunity to be included as a Great Ride.	Great South Various interest groups
National funding	Proactively monitor and pitch proposals to central government funding programmes for cycle trail and mountain bike park developments.	Maximised government support for cycle tourism investment when eligible.	All councils Great South
Partner with Ngā Papatipu Rūnaka ki Murihiku	Ongoing partnership with Ngā Papatipu Rūnaka ki Murihiku on cycle tourism developments in their rohe.	All cycle tourism developments engage Rūnaka for guidance.	Ngā Papatipu Rūnaka ki Murihiku All councils Various interest groups
Community Board plans	As Southland District Council Community Board Plans are reviewed ensure cycle tourism aspirations and priorities are considered.	All community plans clearly highlight their cycling priorities and support potential cycle projects that benefit both visitors and local residents.	SDC Great South Various interest groups






# Proposed regional cycle trail network

This map is an illustration of the possible formation of a connected regional off-road trail network, similar to the Southern Scenic Route, and shows possible connections to the wider Central Otago and Queenstown Lakes trails network. It also identifies the current, and proposed, mountain bike parks.

Other connections could be considered, such as Lumsden to Māruawai Gore, to create more of a loop within Murihiku Southland.

There are further options to develop a separate gravel/bikepacker network on existing backroads which are not shown on this map.



-  **EXISTING TRAILS, INCLUDING NEIGHBOURING REGIONS**
-  **EXISTING MOUNTAIN BIKE PARKS**
-  **NEXT STAGE TRAILS**
-  **NEXT STAGE MOUNTAIN BIKE PARKS**
-  **LONG TERM CONNECTING TRAILS, INCLUDING NEIGHBOURING REGIONS**

# Measuring success

How success is measured, as well as the impact of our visitor economy as a whole, requires consideration of new methods that reflect a destination management approach.

Success measures of the cycle tourism opportunity assessment should be intrinsically linked to those that are suggested and outlined in the Murihiku Southland Destination Strategy 2023, which outlines more holistic measures in line with the benefits we seek to achieve through tourism activity, including community, economy, environment and visitor benefits.

Specific measures, or key performance indicators (KPI's) for cycle tourism opportunities could include:



## REGIONAL TRAIL USER DATA

- ⊕ Number of users from counters across trails in the network.
- ⊕ Mobile phone data monitoring.
- ⊕ Strava heatmap changes.



## ECONOMIC

- ⊕ Estimated spend of trails users (from proposed surveys).
- ⊕ Growth in cycle hire, shuttle and tour operators in the region.
- ⊕ Growth in other businesses offering a targeted experience and/or product for cycle visitors.



## MARKETING AND PROMOTION

- ⊕ Tracking digital and other media coverage of Murihiku Southland cycle tourism stories.
- ⊕ Reporting on cycle tourism products featuring in travel trade channels.



## COMMUNITY AND PERCEPTIONS

- ⊕ Community sentiment regarding cycling facilities and cycle tourism (from proposed surveys).
- ⊕ Visitor perception of Murihiku Southland as a cycle tourism destination (from proposed surveys).
- ⊕ Trail satisfaction reports – benchmarked against NZCT Great Rides.
- ⊕ Monitoring of bike-friendly facility installation (e.g. stands, lockup, charging).





# Appendices

## APPENDIX 1: Comparison with other regions

The table below provides insights from comparison of Murihiku Southland with other cycling regions.

Queenstown, Alexandra (Central Otago), Dunedin, Christchurch (Canterbury), Nelson, and Wellington all have mountain bike trails that are accessible on the edge of the town/city. Waihōpai Invercargill has Sandy Point but this is not comparable as an mountain bike trail offering.

REGION	GREAT RIDES	OTHER NOTABLE CYCLE TRAILS	MOUNTAIN BIKE DESTINATIONS	COMMENTS AND COMPARISON WITH SOUTHLAND
<b>Queenstown</b>	<ul style="list-style-type: none"> <li>Queenstown Trails</li> <li>Kawarau Gorge Trail being contracted</li> </ul>	<ul style="list-style-type: none"> <li>Coronet Loop (likely to be IMBA Epic Trail)</li> <li>Moke Lake, Moonlight, Macetown, Skippers and various back-country trails</li> </ul>	<ul style="list-style-type: none"> <li>Coronet Trails (uplift) with vast altitude descent combining Dirt Serpent, Rude Rock, Morning Glory, and Hot Rod</li> <li>Skyline Trails (gondola)</li> <li>Wynyard Park including jump lines</li> <li>Jardines</li> <li>Seven Mile Trails</li> </ul>	<p>Queenstown challenges Hawke's Bay on popularity of its easy Great Ride Trails network and is now pushing Rotorua on its mountain bike trails offering.</p> <p>The Skyline Gondola trails compete with Christchurch Adventure Park and Rotorua on uplift. It has renowned jump lines at Wynyard and the Coronet gravity trails gain a lot of publicity for Queenstown.</p> <p>All of this is growing with the Kawarau connection to Central Otago trails and the Coronet Loop for an easily accessed back-country experience.</p> <p>One weakness is the seasonality of the gondola and Coronet trails with many suffering freeze-thaw in winter.</p>
<b>Central Otago</b>	<ul style="list-style-type: none"> <li>Otago Central Rail Trail</li> <li>Roxburgh Gorge Trail</li> <li>Clutha Gold Trail</li> <li>Lake Dunstan Trail</li> </ul>	<ul style="list-style-type: none"> <li>Millennium Trail Clyde to Alexandra</li> <li>Gravel riding Old Man Range/Obelisk</li> <li>Renowned Gravel Rides in Hawkdun, Dunstan, Rock and Pillar areas</li> </ul>	<ul style="list-style-type: none"> <li>Matangi Station</li> <li>Flat Top Hill</li> <li>Linger and Die National Downhill Trail</li> <li>Naseby Forest Trails</li> <li>Boot Hill</li> <li>Airport Trails</li> </ul>	<p>Central Otago has a firm grip on easy grade Great Ride Trails with the Lake Dunstan trail gaining huge media profile and use. It is a cornerstone of their tourism strategy with an intended claim to be Aotearoa New Zealand's cycling capital.</p> <p>It has some great mountain bike trail networks but these are outshone by other regions, so it can probably only claim grade 1-2 trail capital status. It also doesn't offer any rainforest cycling experiences.</p> <p>Like Queenstown and Wānaka some of the mountain bike trails are winter-frost affected.</p> <p>Central Otago's generally dry, brown/gold landscapes and being landlocked distinguish it, but also enable regions like Murihiku Southland to offer a compelling difference with lush green rural and rainforest landscapes.</p>
<b>Dunedin</b>	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>Harbour Cycleways</li> <li>Tunnel Hill and northern coastal trails being planned</li> </ul>	<ul style="list-style-type: none"> <li>Signal Hill (shuttle)</li> <li>Whare Flat</li> <li>Redwoods</li> <li>Bethunes</li> </ul>	<p>Although it has some good city and harbourside riding, Dunedin has been lagging behind the rest of Otago for Great Rides.</p> <p>This is set to change with connections to the Clutha Gold Trail, the Northern Coastal Communities project and potentially a link to Middlemarch and the Otago Central Rail Trail.</p>

REGION	GREAT RIDES	OTHER NOTABLE CYCLE TRAILS	MOUNTAIN BIKE DESTINATIONS	COMMENTS AND COMPARISON WITH SOUTHLAND
<b>West Coast</b>	<ul style="list-style-type: none"> <li>West Coast Wilderness Trail</li> <li>The Old Ghost Road</li> <li>Paparoa Track</li> <li><i>Kawhitiri Trail underway</i></li> </ul>	<ul style="list-style-type: none"> <li>Heaphy Track (IMBA Epic)</li> <li>Franz Joseph Glacier Trail</li> <li>Various back country and mining heritage trails (Big River, Waiuta, Waitahu, Kirwans) in Reefton</li> <li>Charming Creek and Denniston Shortcut combining with The Old Ghost Road</li> <li>Cycle touring West Coast Highway</li> </ul>	<ul style="list-style-type: none"> <li>Blue Spur Trails in Hokitika</li> </ul>	<p>The West Coast is probably the main challenger to Murihiku Southland in terms of providing a range of iconic scenery but it has no beach experience like Ōreti.</p> <p>With a very strong Great Ride offering covering the easy to advanced spectrum, The Old Ghost Road gains the most international recognition as a world class adventure ride.</p> <p>Weather is a detractor.</p> <p>While it has great rides for intermediate-to expert mountain bikers it is currently weak on mountain bike trail parks. Murihiku Southland is already stronger in this area.</p>
<b>Canterbury</b>	<ul style="list-style-type: none"> <li>Alps 2 Ocean (Tekapo section)</li> </ul>	<ul style="list-style-type: none"> <li>Christchurch City Network</li> <li>Wharfedale Track</li> <li>Poulter Track</li> <li>Hanmer Spring Mountain Bike Park</li> <li><i>Little River Rail Trail being improved</i></li> </ul>	<ul style="list-style-type: none"> <li>Christchurch Adventure Park</li> <li>Victoria Park Trails</li> <li>Craigieburn Trails</li> <li>Mt Hutt Bike Park</li> </ul>	<p>Canterbury is so vast it is difficult to consider it one regional destination.</p> <p>Christchurch Adventure Park is now its most prominent asset with chairlift and Victoria Park trails are accessible on the edge of the city.</p>
<b>Nelson/Tasman</b>	<ul style="list-style-type: none"> <li>Tasman's Great Taste Trail</li> <li>Coppermine Trail (could be IMBA Epic Trail)</li> </ul>	<ul style="list-style-type: none"> <li>Rameka Trail</li> <li>Heaphy Track (IMBA Epic)</li> <li>Killdevil Track</li> <li>Maungatapu Track</li> </ul>	<ul style="list-style-type: none"> <li>Sharlands, Fringed Hill, Codgers-Maitai, Silvan, and Richmond Hills</li> <li>Kainui Bike Park</li> <li>Cable Bay Bike Park (uplift)</li> <li>Kaiteriteri Bike Park,</li> <li>The Gorge Mountain Bike Park (uplift)</li> <li>St Arnaud Trails,</li> <li>Beeby's Knob Trails</li> </ul>	<p>Nelson has one of the most complete ranges of cycle trail and mountain bike trail offerings, including uplift at The Gorge and high-use Tasman Great Taste Trail.</p> <p>If the proposed Fringe Hill Gondola ever goes ahead this will be another step up.</p> <p>Weather is an advantage.</p>
<b>Wellington/Wairarapa</b>	<ul style="list-style-type: none"> <li>Remutaka Cycle Trail</li> </ul>	<ul style="list-style-type: none"> <li>Various semi-urban and coastal trails in Hutt Valley, Porirua and Kapiti</li> <li>Semi wilderness trails in regional council parks</li> <li>Harbourside concrete pathways</li> <li>Greytown Trail</li> </ul>	<ul style="list-style-type: none"> <li>Makara Peak MTB Park</li> <li>Wainui Trail Park</li> <li>Mt Vic Trails</li> <li>Brooklyn Trails</li> <li>Miramar Trails</li> <li>Rangituhi Trails in Porirua</li> <li>Whareroa Trails</li> <li>Kaitoke Trails</li> </ul>	<p>Wellington is developing its position around having the best trail network in and around a metro city, literally accessible from the CDB and recently won an international award for planning further such trails. It is renowned for trail through regenerating native bush, including technical, rooty and rocky trails.</p> <p>There are small shuttle operators, by appointment, across multiple parks.</p> <p>Porirua Adventure Park is proposed to be developed including gondola uplift by the same developer as Christchurch Adventure Park.</p> <p>Wairarapa Five Towns Trail from Masterton to Featherston will be a strong Great Ride equivalent.</p>

<b>Hawke's Bay</b>	<ul style="list-style-type: none"> <li>Hawke's Bay Trails</li> </ul>	<ul style="list-style-type: none"> <li>Five Beaches Gravel Ride</li> <li>Waipukurau Tukituki Trails</li> </ul>	<ul style="list-style-type: none"> <li>Eskdale Forest</li> <li>Panpac Mountain Bike Park</li> <li>Te Mata Peak Mountain Bike Park</li> <li>Waipukurau Mountain Bike Park</li> </ul>	<p>Among the most popular trails because it is a well-connected network and accessible to residents for both commuting and recreation. It links cities with wineries, arts and scenic spots.</p> <p>Characteristic limesand trails on floodbanks, along with concrete coastal paths and gravel riverside trails.</p> <p>Hawkes Bay was a national leader in mountain bike trail and club participation but others have challenged this recently.</p> <p>Weather is an advantage.</p>
<b>Taupo</b>	<ul style="list-style-type: none"> <li>Great Lake Trails (multiple) grades 2-4 that have gaps between with boat connection</li> <li>The Timber Trail has Taupo-based operators servicing it</li> </ul>	<ul style="list-style-type: none"> <li>Tongariro River Trail</li> <li>Te Iringa Tree Trunk</li> <li>Gorge Lions lakefront Trail</li> <li>Rotary Ride</li> <li>Huka Falls</li> <li>Aratiatia Dam</li> </ul>	<ul style="list-style-type: none"> <li>Craters of the Moon Mountain Bike Park</li> </ul>	<p>Free draining pumice soils are a strength allowing riding in all weather.</p> <p>A good range of trails accessible from town and visitor accommodation.</p> <p>The Great Rides disconnected sections makes them harder to understand and plan.</p> <p>No mountain bikeuplift and trails have very limited vertical.</p> <p>With only being one hour from Rotorua, they are often combined by visitors.</p>
<b>Rotorua</b>	<ul style="list-style-type: none"> <li>Whakarewarewa Forest Loop grade 2-3</li> </ul>	<ul style="list-style-type: none"> <li>Te Ara Ahi</li> <li>Western Okataina Track</li> <li>Whirinaki &amp; Moerenga backcountry racks</li> </ul>	<ul style="list-style-type: none"> <li>Whakarewarewa Mountain Bike Park (shuttle) 100km of trails - Aotearoa New Zealand's biggest</li> <li>Skyline Trails (goldola)</li> <li>Rainbow Mountain</li> </ul>	<p>Rotorua has been Aotearoa New Zealand's pinnacle mountain bike destination but Nelson, and especially Queenstown, are competing strongly.</p> <p>The area benefits from being central to most of the country's population, with Aucklanders able to do weekend trips.</p> <p>The Crankworx event puts it, and Aotearoa New Zealand, on the global mountain bike map.</p> <p>Iwi are significant partners as forest owners.</p> <p>The Whakarewarewa Forest Loop replaced the Te Ara Ahi Trail in the NZCT Great Rides network in 2022.</p>
<b>Auckland</b>	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>Improving urban cycleways including Lightbridge and Around The Bays</li> <li>Hunua bikepacker route</li> <li>Various micro trails</li> </ul>	<ul style="list-style-type: none"> <li>Fourty Mountain Bike Park (shuttle) - private</li> <li>Woodhill Forest</li> <li>Riverhead Forest Trails</li> <li>Maraetai Forest</li> <li>Hunua Trails</li> <li>Various small trail areas in coastal regional parks</li> </ul>	<p>Auckland's trails are very spread out and disconnected.</p> <p>Woodhill Mountain Bike Trails are well used but limited elevation has meant it has fallen down any ranked list of mountain bike trail parks.</p> <p>Fourty is nationally renowned with shuttle uplift but well out of the CBD.</p> <p>No Great Rides but the urban and waterfront cycleway offering is becoming interesting.</p>

## APPENDIX 2: Suggested criteria for ranking proposed trail projects in relation to cycle tourism

The following is a list of criteria, or attributes, that could be considered in prioritising investment in Murihiku Southland trail development. It is recommended that these should be refined and given weightings to establish a weighted attributes model for scoring various projects.

### Destination Experience Enhancement

- Does the route provide superior/unique scenic value compared with other Aotearoa New Zealand trails?
- Does the proposed route provide access to land and scenery that is currently not easily available? *e.g. preferably well away from roads/traffic*
- Does it showcase and provide links between key attractions, facilities and services, thereby increasing their custom?
- Does it strengthen wider trail network connections within the region?
- Does it provide a variety of scenery/settings to retain interest?
- Does it complement rather than compete directly with or detract from existing trail assets?
- Does it widen the range of trail grades and experiences?
- Will it encourage regional dispersal of visitor activity and benefits?

### Economic Impact

- Is the experience of sufficient scale and/or quality to create a specific reason to visit Murihiku Southland?
  - Will it generate extended stay by visitors who are coming anyway?
  - Does it take visitors near businesses where they are likely to spend?
  - Will the economic impact be the number of visitors likely to come primarily for the trail? *e.g. length of stay and/or average daily spend*
- OR**
- Will the economic impact be expressed in more direct economic benefits for the region? *e.g. new business opportunities and/or full time equivalent jobs created*

### Feasibility

- Does the location benefit from existing visitor flows?
- Is there adequate accommodation and other services to support overnight visitation?
- Cost: Is it likely to be affordable to consent, construct and maintain?
- Land tenure: Is there suitable land access? *e.g. as of 2023 Fiordland National Park and Murihiku Southland Conservancy only enables trails where specifically identified or where vehicle access exists and obtaining easements over multiple private properties can be extremely difficult – if several landowners are opposed, it is unlikely to proceed*
- Terrain suitability: Are factors such as gradient, drainage and geology suitable for construction?
- Is it consentable? *e.g. cultural effects, heritage effects, removing vegetation, species habitat disturbance, increasing silt run-off from slope cutting, visual affects – are these minor and/or can they be mitigated?*
- Resilience: Will ongoing maintenance be manageable, given sea level rise and increasing extreme weather events?
- Is it likely to be eligible for and attract non-council funding sources? *e.g. additional funding – most significant trail projects will require some form of central government funding*
- Is there a project-backing community entity that has already demonstrated strong organisational skills and fundraising efforts?

### Environmental Impact

- Will it engage the community in volunteer work such as planting, weed control and pest control activity?
- Where the trail project includes new fencing, will this improve margins between stock and waterways, riparian zones or coastal margins?
- Does it reduce carbon emissions by replacing vehicle trips with cycle trips?

### Direct Community Benefits

- Does the proximity to local population centres mean it will be a well-used resident recreation asset, including those who can't drive?
- Has the idea come from or, been well canvassed and supported, by the local community? *e.g. raised in wider community consultation*
- Is there a nucleus of interested local people or organisations prepared to put time and resource behind it?
- Does it enhance Iwi access to their sites of importance such as rivers and Mahinga Kai?
- Does it create new active transport connections for everyday trips, getting cars off roads and reducing emissions? *e.g. enabling trips to school, to sports activities, visiting friends, shopping, dining*
- Does it help address key existing safety issues? *e.g. removing kids on bikes from the road*
- Does it reduce traffic, carbon emissions and air pollution?
- Does it give local youth something to keep them out of trouble, including in-curriculum school activities?
- Is it something families can do together?
- Is it creating an asset/facility that enables hosting of new events for the community and visitors?

## APPENDIX 3: Examples of bike friendly business guidelines

For travel insurance policies to be valid, secure bike parking is a must overnight. There are also plenty of other things that can be done to appeal to cyclists.

Tour operators who are providing hire bikes may not want any tools given to their clients due to the risk they don't know how to use them properly, causing damage – this list is targeted more at guests riding their own bikes.

### Secure Bike Parking or Storage

- A storage room, a lockable garage or barn, or a utility room where bikes can be locked overnight. *Some standards specify hanging racks to hang bikes vertically*
  - Ability to lock bikes individually if all guests can access bike storage. *Some standards include video surveillance (in bigger properties)*
- IF NOT**
- Guests are able to bring their bikes indoors, either into a communal space in the property or into their room if big enough.
  - 2sqm per bike so bikes don't have to touch each other – not just a room where they have to be stacked against each other leading to damage.

### Bike Washdown and Tools

- Bike washdown area with bike cleaning brushes and hose, with good drainage.
- Changing room for when people come in wet and muddy so they don't have to make a mess of their accommodation rooms (including clothes hanger, shoe shelves etc).
- Somewhere to charge e-bike batteries (a regular socket will do) or for people to charge their mobile phones.
- A bike repair stand.
- Bike tools – this could be kept inside or have a stand that has various tools cabled to it that stays outside. These should include:
  - Compact bike tool
  - Track/floor pump
  - Puncture repair kit with tyre levers
  - Screwdrivers and spanners
  - Allen keys
  - Chain oil or lubricant
  - Cleaning cloths
  - A more comprehensive specialist bike tool box (including pedal wrench, chain-breaker etc).

### Accommodation Operators

- Be flexible on stay length requirements and offer single night stays, cycle trail riders on multi-day routes will likely only want one night, but you may get cycling guests self-driving who could stay longer and venture out to different places.
- Laundry facilities
- A room for cyclists to air and dry their cycling clothes (with a heat source).
- All staff to be knowledgeable on local biking trails and opportunities.
- Have arrangements with local bike hire and servicing providers. This may include delivery of hire bikes or invest in some bikes yourself to hire out (but you must be able to get them serviced).
- Information to help cyclists who are arriving on public holidays, Sundays or after hours, when local shops have shut.
- Look at providing hearty breakfasts and packed lunches.
- Look at providing a welcome pack of basic supplies for cyclists.
- Provide a fully equipped First Aid kit with basic supplies for minor injuries and remember to restock.
- Have medical centre and emergency details readily available.

### Hospitality, Retail, and Visitor Experiences

- Provide targeted welcome sign "XYZ Trail" so they know you have an interest in the those cycling past.
- Let your customers top up their water bottles free of charge.
- Offer special nutrition for cyclists (e.g. energy balls).
- Consider cycle trail themed drinks and meals (e.g. meals could be named after trails or well-known destinations on trail).
- Give staff some helpful knowledge to impart and ensure they can project enthusiasm/empathy for cycle trail riding and riders.
- Provide bike stands, preferably lockable.

## APPENDIX 4:

# Summary of actions Southland Cycling Strategy 2016 – 2026 (tourism related)

The table below provides a high-level summary of the actions – and their description and priority level – that linked directly to tourism from the Southland Cycling Strategy 2016 - 2026.

Note: No owner or lead organisation was ever defined for these actions in the Southland Cycling Strategy 2016 - 2026 and some require multiple stakeholder involvement.

ACTION	DESCRIPTION	PRIORITY	UPDATE
A4	Investigate development of a cycle lane or path from Invercargill Airport, cycle friendly facilities and bike racks	Medium	A new cycle path and access from the Airport was completed in 2023 as part of the Stead Street Stop bank upgrade.
A6	Develop and communicate a timeline and plan of the Invercargill to Bluff cycleway	High	Te Ara Taurapa, to Suir Street Motupōhue Bluff was completed with cultural narrative and officially opened in March 2022.
B1	Investigate, designate and promote a range of quality road riding itineraries as Heartland Rides	High	Waka Kotahi NZTA online cycling map includes: <ul style="list-style-type: none"> <li>• Lumsden to Waihopai Invercargill 'Southern Traverse' Heartland Ride – mostly off state highway</li> <li>• Designated on-road cycle touring/bikepacking routes</li> <li>• Piopiotahi Milford Sound to Te Anau on to Tuatapere</li> <li>• Waihopai Invercargill and Te Akau Tai Toka The Catlins following the Southern Scenic Route</li> <li>• Lumsden to Beaumont, but this bypasses Riversdale and Māruawai Gore</li> </ul> Note the routes have no wayfinding, such as sign on the physical trails.
B2	Design and install cycling route signage	High	Signage installed on the three main official cycleways: ATMCT (official Great Ride), L2L Trail and Te Ara Taurapa.
B3	Promote the Around The Mountains Cycle Trail	High	Ongoing through ATMCT Trust, GS, SDC and NZCT.
B4	Encourage greater focus on Southland areas of the Around The Mountains Cycle Trail – trail related products and attractions	High	Ongoing through ATMCT Trust, GS, SDC and NZCT. Mossburn Hotel's Wheels and Reels accommodation is one of the more successful local businesses leveraging the trail. Bike Fiordland is established for tours, hire and shuttles. They, and other tour operators, are increasingly combining the ATMCT with Te Anau's L2L Trail.
B5	Encourage completion of the Te Anau to Manapouri cycleway on the route through Fiordland National Park to ensure a quality visitor experience	Medium	Lake2Lake Trail is operating successfully along the whole route, however the middle section still uses state highway to bypass a segment of Fiordland National Park. Continued advocacy required for CMS and FNP plan review.
B6	Support a review of Fiordland National Park Management Plan investigating low impact cycling opportunities	Ongoing	Continued advocacy and support for CMS and FNP plan review, but this is still likely years from completion. Milford Opportunities Project seeks to accelerate enabling new shared use trails in Eglington Valley/Knobs Flat.
B7	Comprehensive information on cycling experiences on tourism websites, visitor information and websites. Include maps, details of each ride, cycle friendly services, food and accommodation, booking links, bicycle shops – available in paper and digital form and downloadable apps	High	GS has updated the regional website southlandnz.com with cycling product and mountain bike itineraries. Ongoing review and improvement.

B8	Promote Southland cycling experiences as a major pillar in tourism planning and part of Southland tourism marketing through a variety of media, social media, marketing and public relations	High	Ongoing improvements with new assets (photos and videos) created during 2023.
B9	Establish a monitoring system to obtain information on use of major cycling trails including ATMCT, Te Anau to Manapouri Trail and Invercargill to Bluff and demonstrate the contribution to the economy	High	Continue to support Trails Trust and Councils with data collection. Reasonable trail count data is coming from ATMCT, L2L and Te Ara Taurapa.
B10	Undertake a business case into the best options for developing future multi-day trail ride journeys in Southland	Low	Trail projects are being investigated and driven by individual groups rather than regional strategy and/or entity.
D6	Consider the development of a Festival of Cycling in association with other events already held in Invercargill, such as SBS Bank Tour of Southland	Medium	Not yet started, however successful individual events like SBS Bank Tour of Southland, Hokonui Moonshine, and National Secondary School Mountain Bike Championship at Motupōhue Bluff. A wider festival concept needs work by the various cycling organisations.
E4	Investigate the establishment of a signature event for the Around The Mountains Cycle Trail to raise awareness of the opportunity the trail offers	Medium	Initial investigation underway with the ATMCT Trust and Trail Manager.
F1	Develop guidelines for provision of cycle-friendly services in Southland	High	Not yet started. Great Ride guidelines in use for operators with ATMCT.
F2	As cycling experiences and routes are developed, hold experience development workshops with local businesses, accommodation operators, tour operators, transport services, local government to build awareness of the needs of cyclists and the benefits of offering cycle-friendly services and experiences linked to cycle tourism	Medium	Initial investigation underway. Some of this support occurs under other GS business development programmes but yet to design and deliver specific cycle tourism programme.
F3	Develop a programme for mentoring and business development advice for local enterprises establishing cycle-friendly services and products. This programme could be linked to other tourism or business support programs	Medium	Initial investigation underway.
F4	Encourage availability of more bicycle hire near cycle trails and road cycling routes	Medium	Ongoing. New hire providers have established in Te Anau around L2L Trail and servicing ATMCT.



**GREAT SOUTH** 

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