

West Coast Wilderness Trail Market Research Results 2018



WEST COAST
WILDERNESS TRAIL



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Executive Summary

In 2017 the inaugural West Coast Wilderness Trail market research survey was undertaken and a comprehensive report prepared. For simplicity, and because the main finding of the 2018 survey mirror those findings, this report provides a simple snapshot of the results. Commentary has only been provided on notable changes from the 2017 survey along with an infographic summary of the results.

The 2018 survey was undertaken over five samplings, three at Cowboy Paradise (56% of the sample) and two at Karoro Domain (44% of the sample). The total sample size was 230 responses.

Twenty riders identified themselves as on Tour Aotearoa this year as opposed to just one in the 2017 survey. This is not the trail's normal market. These riders were passing through quickly so will have had a small impact on the direction of travel, start and end points, length of stay and spend.

Also impacting on the results is the fact that riders are being stopped while on the trail and largely giving quick off the cuff answers. This should be considered when interpreting the information particularly on expenditure where estimates are given. Although riders were asked for their own expenditure, there is no certainty if they have, for example, included accommodation for one or two riders. Another factor is that the interviewer asked that only one member of a group fill out the form at Karoro, meaning the loss of some data including the number of groups. Whilst care was taken, there is likely to be some human error in the input and analysis of the data. Overall the results do meet what is being observed on the trail and the results are similar to those of the previous year.



Key Findings from the 2018 West Coast Wilderness Trail 2018

About the Riders

Main purpose of visit: 91% of riders have come here with the main purpose to ride the trail i.e. new visitors attracted by the trail's existence. As could be expected, most are on holiday (as opposed to training, fitness), 66% in the overall survey and 76% of those sampled at Cowboy Paradise. The difference is due to the Karoro sample containing local people out exercising.

Reason for riding the trail: Scenery ranked the number one reason followed by it being part of the Tour Aotearoa, easy, friends, fun, fitness and challenge.

Age: 50-59 (47%) is the main age group riding the trail followed by 60-69 (30%). This is a reverse of the 2017 findings however the majority of riders are still over 50.

Gender: The split between males and females is almost even, with slightly more females.

Group makeup: 92% of those surveyed were adult only groups with 8% containing children 14 years or under. Almost half the riders (48%) were travelling in groups of 3 or more, 31% as individuals, 23% in pairs. The majority of those were friends (36%) followed by individuals (19%), family groups (16%) then a mix of family and friends (14%). There were no business groups on the trail. The group statistic will be significantly under represented due to the Karoro interviews only sampling one from each group.

Origin of riders: The sample from Cowboy Paradise is considered a more true reflection of the actual full trail riders. West Coasters comprised 5% of riders, domestic New Zealand were 83% and international riders 12%. This reflects the same statistics from 2017.

From the overall survey sample total, 25% were from the West Coast, 64% were domestic New

Zealand and 11% were internationals. The overall West Coast rider numbers is influenced by the large number of locals on the trail at Karoro.

Domestic Region of Origin: West Coast riders remain the largest group (31%). As noted above, this can be attributed to local riders at Karoro. Almost evenly split this year are Auckland (16%), Canterbury (16%) and Wellington (14%). Of note is an increase in the percentage of riders from Wellington.

International Country of Origin: Australia (50%) remains the predominant country international riders are from. The Netherlands featured second (12%) followed equally by the UK, Germany and Canada.

Method of transport: 41% have come in a private car. Plane was the second most popular on 11%. "Other" was also popular with biking as the most predominant method mentioned. This was due to riders on the Tour Aotearoa.

Length of Stay: The most popular length of stay on the trail is 3 days (42%) followed by 4 days (18%). When the numbers are averaged, the stay is calculated at 2.9 days on the trail and 3.9 days on the West Coast. In the 2017 survey the length of stay was 3.2 on the trail and 4.3 on the West Coast. This suggests most riders are here for the trail only and head away once completed.

Direction of travel: Riding from north/south (64%) remains the predominant way the trail is ridden. Note the Karoro and Tour Aotearoa sample will be elevating this result. The result from the Cowboy Paradise sample is 59% north/south, 36% south/north and 5% riding a return section.

Planning the trip

Planning time: The majority (25%), plan more than a year out, 21% 6-12 months out.

Hearing about the trail: The majority hear from friends, family and colleagues (51%) followed by the website (12%). Tour Aotearoa and the Kennett books are also popular as well as local knowledge.

Planning the trip: Most have had a friend or colleague plan the trip (33%), the website is the next most popular method (28%).

Social Media: Facebook was the most popular social media channel used (63%) followed by no use of social media (32%) then by Instagram and TripAdvisor.

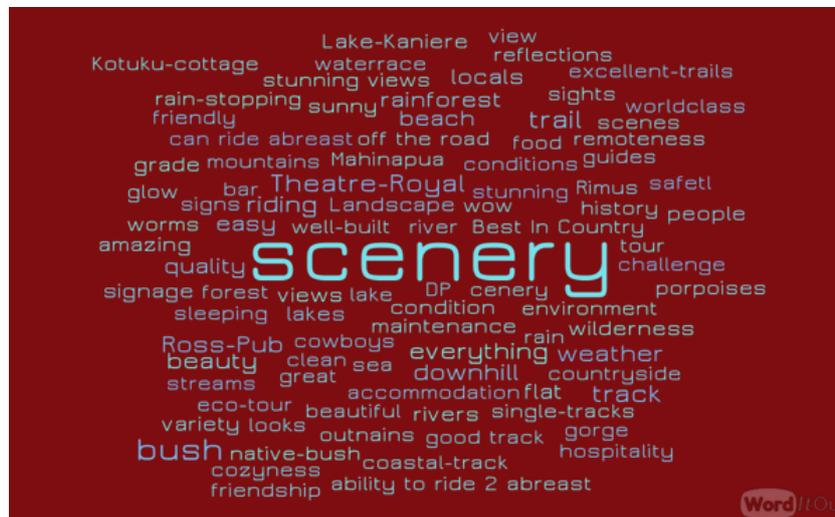
Economic Return

Most popular spend category: \$750-\$1000 (18%), \$251-500 (16%), \$501-750 (15%). This has increased from last year where \$250-500 was the most popular category.

The total spend per person (excluding expenditures with booked tours) is estimated at \$508 per rider or \$195.46 per rider per day. This compares with the 2017 calculation of \$663 per rider and \$207 per rider per day. This figure can only ever be interpreted as an estimate as it is based on the riders' quick estimates. Further, removing the 20 Tour Aotearoa riders, the spend per rider per day is \$208 and aligns with the previous year.

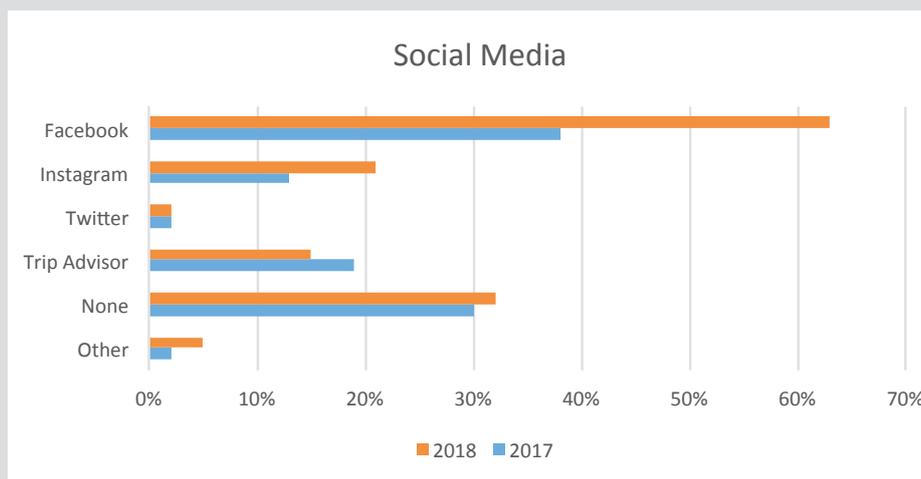
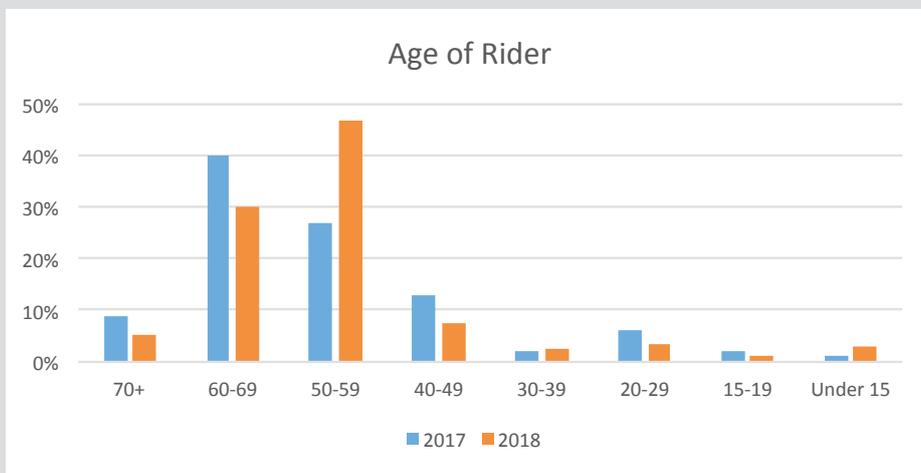
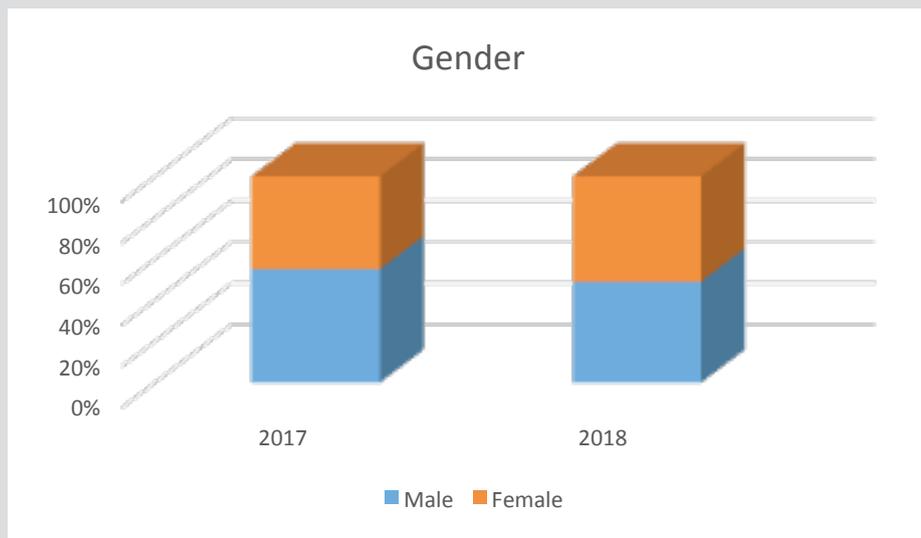
Rider Experience

The most enjoyable thing: Scenery was the top mentioned feature riders enjoyed.

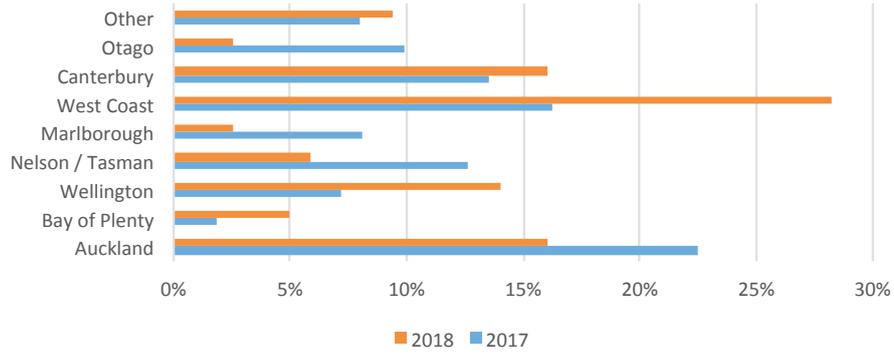


West Coast Wilderness Trail Market Research Results 2017 and 2018 Infographics

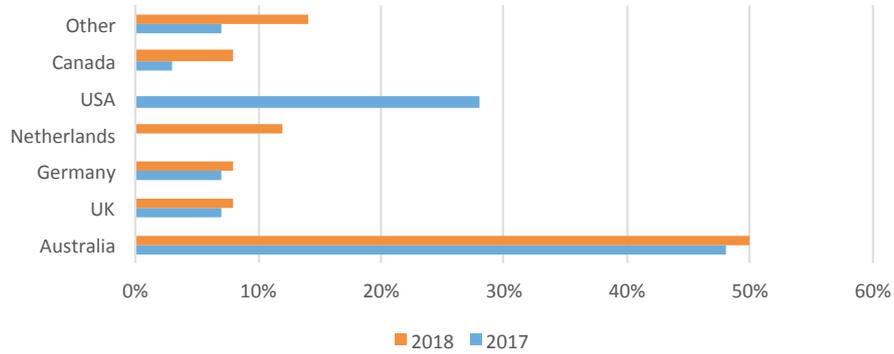
About the Riders



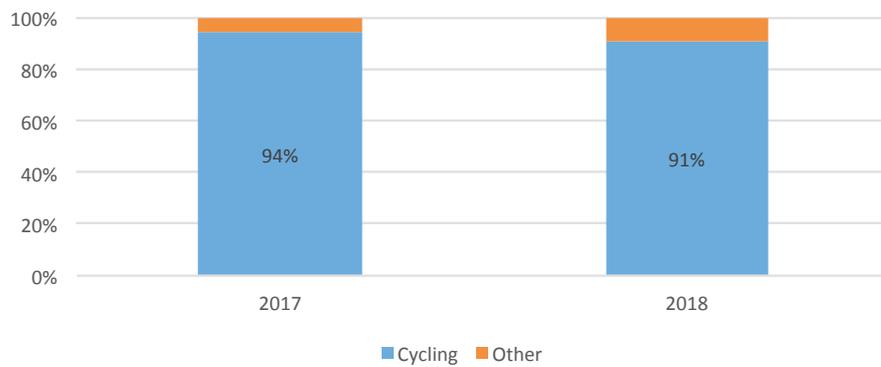
Origin of Domestic Riders



Origin of International Riders

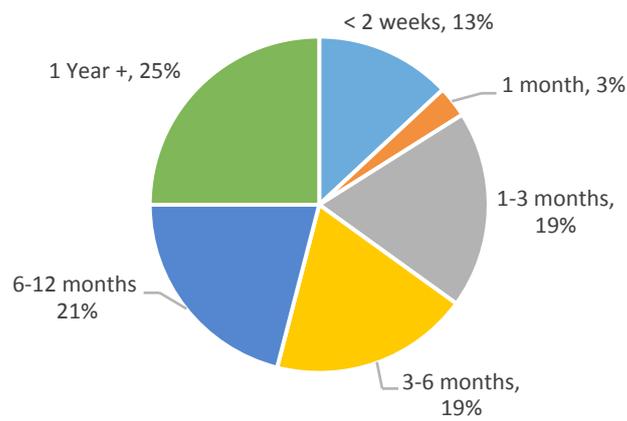


Reason for Visit

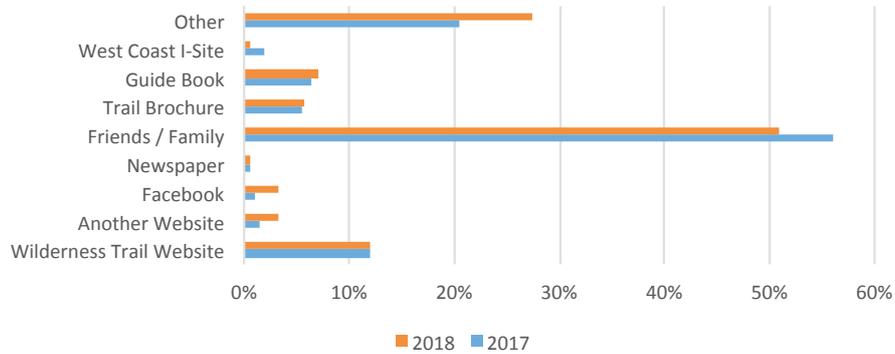


Planning the trip

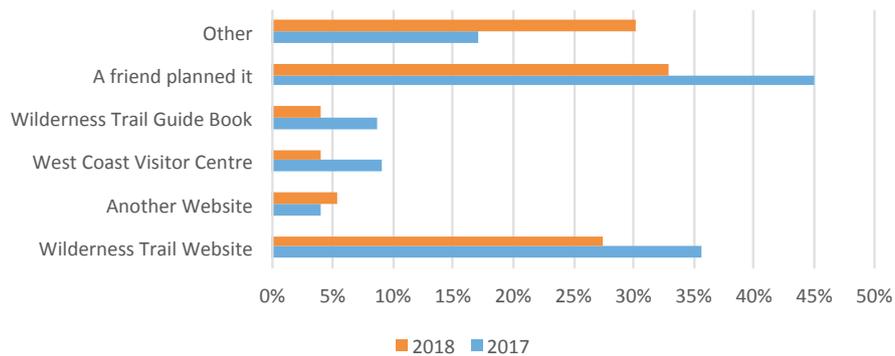
Length of Time Planning Trip



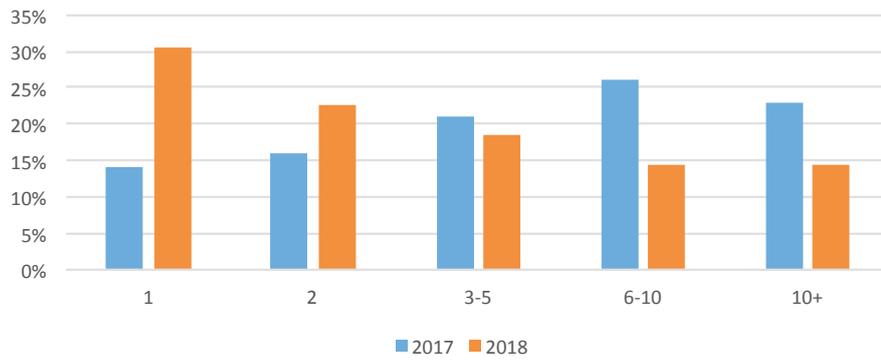
How riders found out about the Wilderness Trail



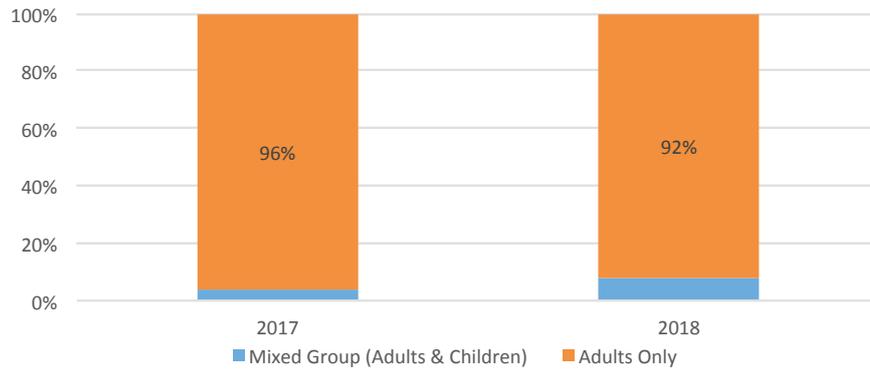
Means of Planning the Trip



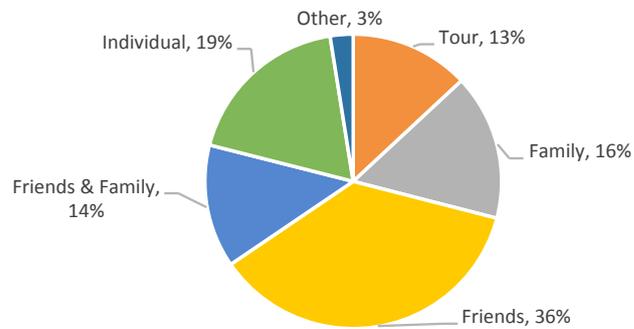
Size of Group



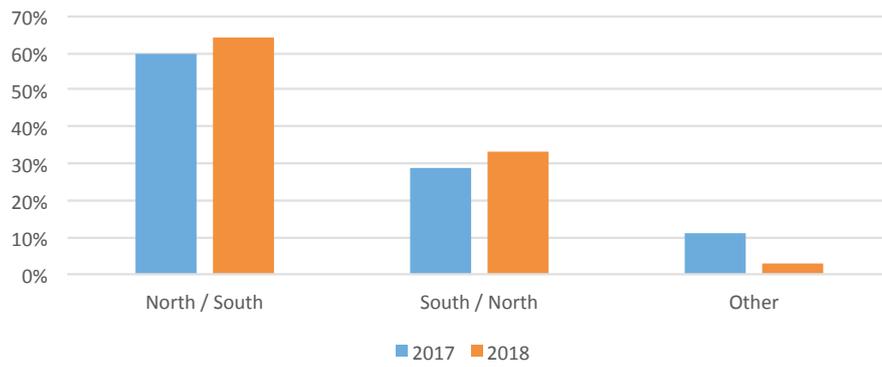
Makeup of Group



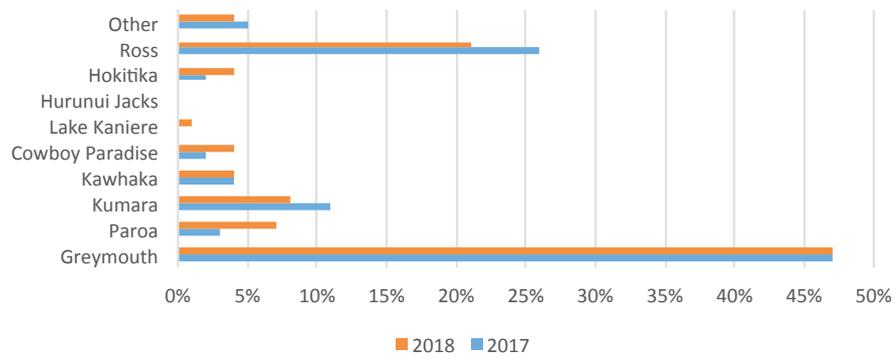
Travel Party Composition



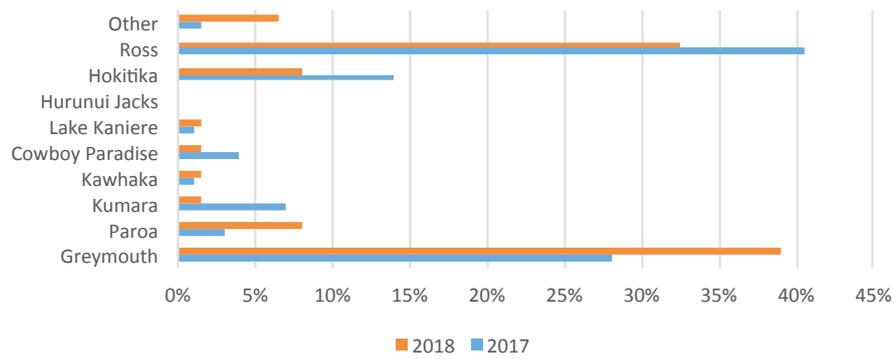
Direction of Travel



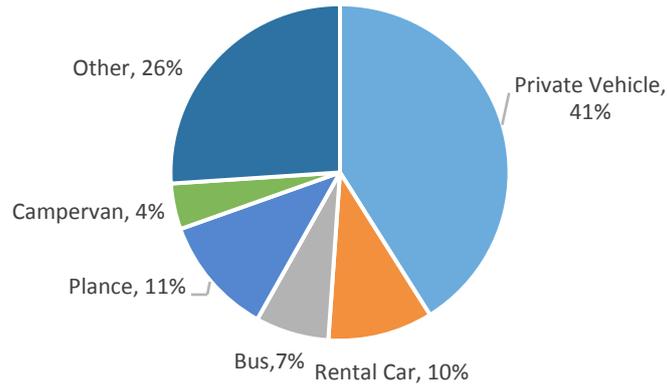
Wilderness Trail Starting Location



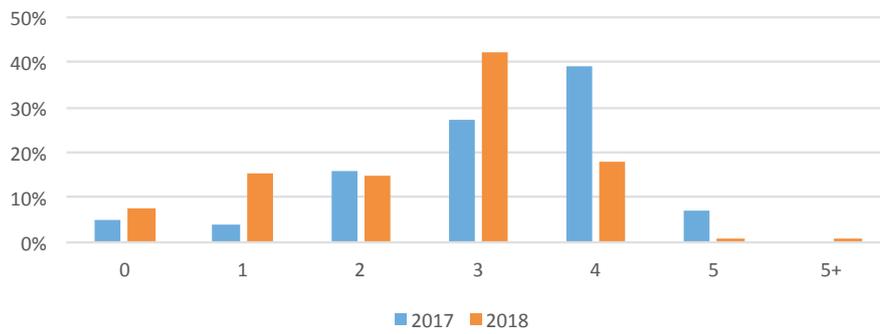
Wilderness Trail End Location



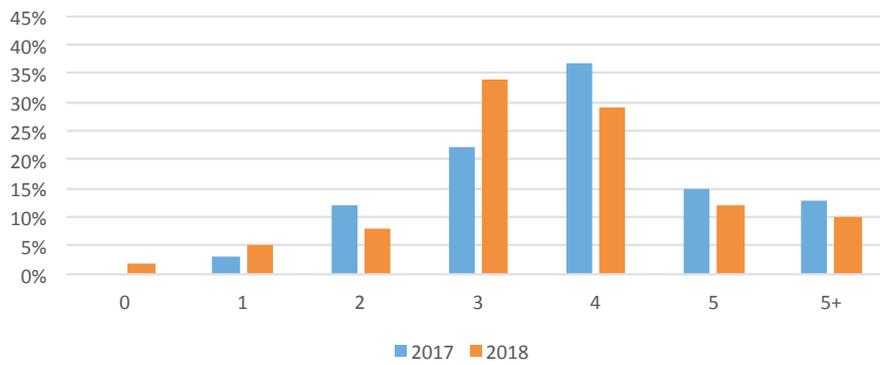
Transport to the West Coast



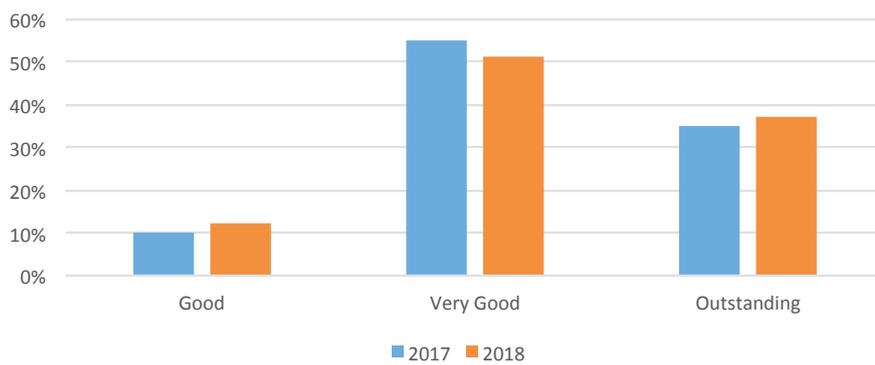
Nights on the Wilderness Trail



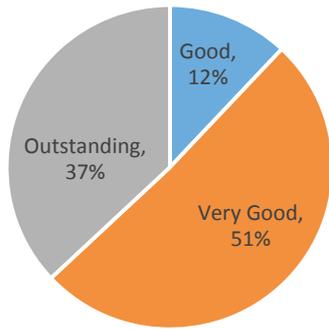
Nights on West Coast



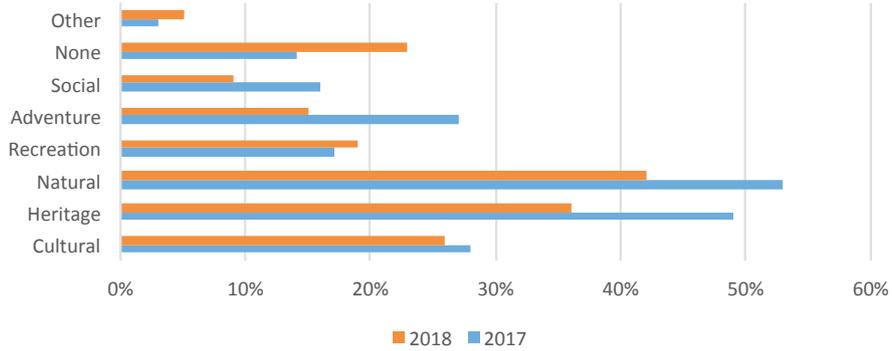
Satisfaction Rating



Satisfaction Rating



Potential Wilderness Trail Developments



Economic Return

Total Expenditure

