



# FIORDLAND TRAILS LAKE2LAKE TRAIL IMPACT ASSESSMENT [YE MARCH 2023]

Prepared for Fiordland Trails Trust  
June 2023

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# INTRODUCTION

## Background

Operated by the Fiordland Trails Trust (the Trust), the Lake2Lake Trail is a Grade 2 (easy) cycling and walking trail that connects Lake Te Anau with Lake Manapouri. The trail has enjoyed good levels of use over the last five years and, while impacted by COVID-19-related border closures and domestic market lockdowns, use of the trail has bounced back fairly quickly.

A new multi-use trail has been proposed from Te Anau to Te Anau Downs. Connecting with the Lake2Lake Trail at Te Anau, this would take the combined trail to a length of 61 kilometres in total. A further extension from Te Anau Downs to Cascade Creek is the subject of a separate feasibility assessment currently underway for the Milford Opportunities Project. Should both extensions proceed, the total offering of (approx.) 120 kilometres of trail would provide for a truly multi-day walking/cycling experience. Alongside these extensions, the Trust is also considering other options for multi-use trail developments (for example, northeast from Te Anau to Upukerora River, and on to Mavora Lakes).

To support approaches for funding, the Trust sought an Economic Impact Assessment (EIA) of the current Lake2Lake Trail and planned future trails for the year ending March 2023. While originally specified as an EIA, a wider 'wellbeing' lens has been taken to impact assessment – considering the social, environmental and other benefits of the trail and planned trail extensions/new developments as well as the economic impacts. This approach resonates with the evaluation frameworks used increasingly by the central and local government stakeholders that the Trust may approach for funding.

## Objectives

This Assessment was designed to measure and to demonstrate the economic (and other) impact of the Lake2Lake Trail and planned future trails on the Fiordland District in the year ending March 2023. Specifically:

- the direct economic impact of expenditure by visitors attracted to the District to use the Lake2Lake Trail;
- the indirect impacts that arise from the development of local businesses and the employment they create; and,
- the wider (social/community) benefits of the trail to the Fiordland District and local communities.

## Methodology

Preparation of the Impact Assessment involved a mix of desk research, consultation with local stakeholders, the collection of new data (via research with trail users and stakeholders, including local business owners/operators), data analysis and reporting.

The main components of research that underpin the Impact Assessment are described further overleaf.

## INTRODUCTION (CONT.)

### DESK RESEARCH

The desk research involved a review of existing data and research relating to the Lake2Lake Trail, including but not limited to descriptions of possible projects, the Southland Cycling Strategy 2018 and the 2014 Te Anau and Environs Cycling Opportunities Study prepared by Simon Noble.

### PRELIMINARY STAKEHOLDER RESEARCH

Ten telephone interviews were completed with trail stakeholders to inform the overall research design and aspects of survey development. The stakeholders involved were nominated by the Fiordland Trails Trust. Information on relevant events was also gathered via email and phone contact with event organisers.

### SURVEY OF TRAIL STAKEHOLDERS

An online survey of stakeholders was designed to complement the trail user survey and to capture the data needed to assess both economic and wider community impacts. A database was compiled by the Fiordland Trails Trust, and included key partners, sponsors and other groups (such as businesses providing products/services for people using the trail; local government entities; local schools; and representatives of sporting, recreation and other community groups.)

All stakeholders were initially emailed by the Fiordland Trails Trust to inform them of the research programme and to request their participation. Angus & Associates then followed up with a personal invitation to complete the online survey. Two generic survey links were also provided for wider distribution to trail users and the business community.

Data for the impact assessment is based on a final sample of n=35 stakeholders, of which n=9 were local businesses. This sample of local businesses is insufficient for robust statistical analysis and only general comment can be made about the economic contribution of the trail beyond the direct impact of visitor expenditure.

### SURVEY OF TRAIL USERS

An online survey of trail users was undertaken to gather information on trail use and expenditure by visiting trail users. For the purposes of this survey, 'trail users' were defined as people who had used the Lake2Lake Trail in any capacity in the last 12 months and were aged 15 years or more.

The data used for the impact assessment is based on a final survey sample of n=311 trail users.

Several methods were used to reach out to potential participants and to encourage broad community and visitor participation. Angus & Associates worked with the Fiordland Trails Trust to develop communications about the research which was publicised across The Trust's communication channels and information about the research was also distributed to the Trust's partners and local businesses. All communications invited trail users to register for the research via a dedicated URL and a linked QR code.

Volunteers from the Trust and an Angus & Associates field staff member also collected contact details from trail users exiting the trail at a range of points from Te Anau to Manapouri. These contacts were then emailed an invitation (and personal link) to complete the survey.

A prize draw incentive was offered to those who responded to the survey.

## EXECUTIVE SUMMARY

This report outlines the findings of work undertaken to measure and to demonstrate the economic (and other) value of the Lake2Lake Trail and a range of possible trail extensions/developments in the Fiordland District. It focuses on economic impact in the 12-month period to March 2023 but delivers a range of metrics that can also be applied to the forecasting of future impact.

A combination of desk research, qualitative insights from interviews with trail stakeholders, secondary data and new survey data has been used to estimate the **direct economic contribution** accruing from qualifying visitors to Fiordland (those visiting for the purpose of using or extending a visit planned for other reasons to use the trail) and other (social/community) impacts; from other event-related expenditure; and from expenditure on trail development and maintenance.

Based on this analysis, we have estimated that: -

- A total of **5,148 visitors** to Fiordland in the year to March 2023 can be attributed to the Lake2Lake Trail (approximately half for the entirety of their visit and half for at least part of their stay).
- These visitors collectively stayed more than **10,000 nights** in the District and spent **more than \$1.8 million in total** (an average of \$349 per person per visit or \$176 per person per night).
- The great majority of this contribution accrued from people visiting Fiordland only/mainly for the purpose of using the trail; each of whom spent an average of **2.7 nights in the area on their stay and \$415 per person**.

- While expenditure on accommodation, food/meals/drinks and local transport accounted for the largest share of visitor spend, **many sectors of the economy benefited to some extent**.
- Based on our analysis of three events only, **at least another \$980,000 accrued to Fiordland from event-related activity** attributable to the Lake2Lake Trail.
- Furthermore, we estimate that, in the year to March 2023, the trail development and maintenance activities of the Fiordland Trails Trust contributed a further **\$245,000 in direct economic contribution** to the District.
- By summing the above – visitor expenditure + other event-related expenditure + trail expenditure - a reasonable estimate of the direct economic contribution made by the Lake2Lake Trail to the Fiordland District in the year ending March 2023 is **\$3.025 million**.

The estimated direct economic contribution of the Lake2Lake Trail in the year to March 2023 is

**\$3.025 million**

**Indirect economic contribution** also accrues from jobs created/sustained and the flow-on effect that results from re-spending of money by households and **businesses** within the local economy. Based on our analysis of secondary data, we estimate that the Lake2Lake Trail **supports 26 full-time equivalent jobs** in the Fiordland District.

## EXECUTIVE SUMMARY (CONT.)

As an indication of other indirect impacts, stakeholder survey data shows that:

- The Lake2Lake Trail has led to the **expansion of some businesses** that predated the official opening of the trail in 2016. Four of the nine participating businesses had expanded or added new services at least partly in response to the trail.
- Four of these nine businesses also indicated that the trail had led to an increase in expenditure by their own business – pointing to **flow-on effects** benefitting other local businesses across the District.
- On average, the nine businesses participating in the stakeholder survey attributed **13% of their annual turnover** to the Lake2Lake Trail.

As well as the economic contribution made by the trail, there are a **wide range of 'felt benefits' for residents of the Fiordland District**. The Lake2Lake Trail is highly valued by the local community, accessible to all, and a source of pride. It is seen to make Fiordland a more vibrant and appealing place to live. Far-reaching in its impact, the Lake2Lake Trail is also thought to have increased the profile of the District, brought new events to the area, helped to stimulate the local economy, and increased employment.

Importantly, it is also thought to stimulate valuable tourism activity during the off-peak and shoulder seasons.

Stakeholders consulted for this Impact Assessment also highlighted benefits across the 'four capitals' of Treasury's wellbeing framework<sup>1</sup>: Human Capital, Natural Capital, Social Capital and Financial & Physical Capital. These benefits are discussed on pages 37-40.

There is very **strong support for the range of trail extensions** that have been proposed by Fiordland Trails Trust, both from trail user and stakeholder perspectives.

The extent of interest expressed by current trail users indicates that any one of these extensions will enhance the District's appeal as a cycling/walking destination, drawing more visitors to the District and encouraging others to stay longer. And for each additional visitor attracted to Fiordland specifically to experience the Lake2Lake (or future trail extensions), Fiordland is set to benefit to the tune of \$415 – and more if average length of stay can be extended.

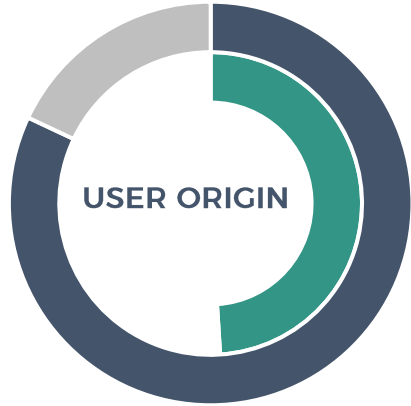
Furthermore, any extension of the Lake2Lake Trail through to Te Anau Downs, when combined with the proposed connection onward to Cascade Creek, has potential to be a game-changer: positioning Fiordland as a destination for a diverse mix of single and multi-day walking and cycling experiences, alongside the likes of Central Otago, Queenstown and Rotorua. The feasibility of the Te Anau Downs to Cascade Creek trail is currently being assessed and the findings of that analysis will be brought back for consideration alongside the impacts highlighted in this report, once the analysis is complete.

Finally, it is worth making special note of the very high proportion of trail users for whom the on-road section of the Lake2Lake Trail is currently problematic. This is not only undermining enjoyment of the Lake2Lake Trail but causing significant safety concerns. Taking the trail fully off-road should be a priority if the trail's future potential – both as valued community asset and economic driver – is to be fully realised.

# TRAIL USAGE



# TRAIL USER PROFILE



Data provided by the Trust indicates that, in the year ending March 2023, there were a total of **32,560 trips** taken on the Lake2Lake Trail.<sup>1</sup> By extrapolating 'last trip' trail user survey data to total trips taken for year ending March 2023, we have estimated that:-

- 15,954 trips (49%) were made by residents of Fiordland and the remaining 16,606 trips (51%) by visitors.
- 26,699 trips (82%) were made by New Zealand residents (including Fiordland residents). The largest groups of domestic visitors originated from Otago (21%), Southland (20%) or Canterbury (19%), with Auckland (12%) also an important source market.
- International visitors accounted for just 18% of all trips.
- Around sixty percent of trail users were female.
- More than half of trail users were aged between 50 and 69 years.
- A typical group using the Lake2Lake Trail comprised an average of 3 people (with the median being 2 per party).

49%

Local residents

(15,954 trips)

82%

New Zealand residents

(26,699 trips)

18%

International visitors

(5,861 trips)

**GENDER**

**AGE**

Age Group	Percentage
20-29 years	5%
30-39 years	13%
40-49 years	20%
50-59 years	24%
60-69 years	27%
70-79 years	11%

**PARTY SIZE**

	Total	Adults	Children
Average	3.0	2.7	0.3
Median	2.0	2.0	0

**DISTRIBUTION BY PARTY SIZE**

Party size	%	Party size	%
1	35%	4	5%
2	40%	5-9	6%
3	10%	10+	4%

Source - Trail User Survey - Total sample (n=311)  
Distribution shows proportion of groups

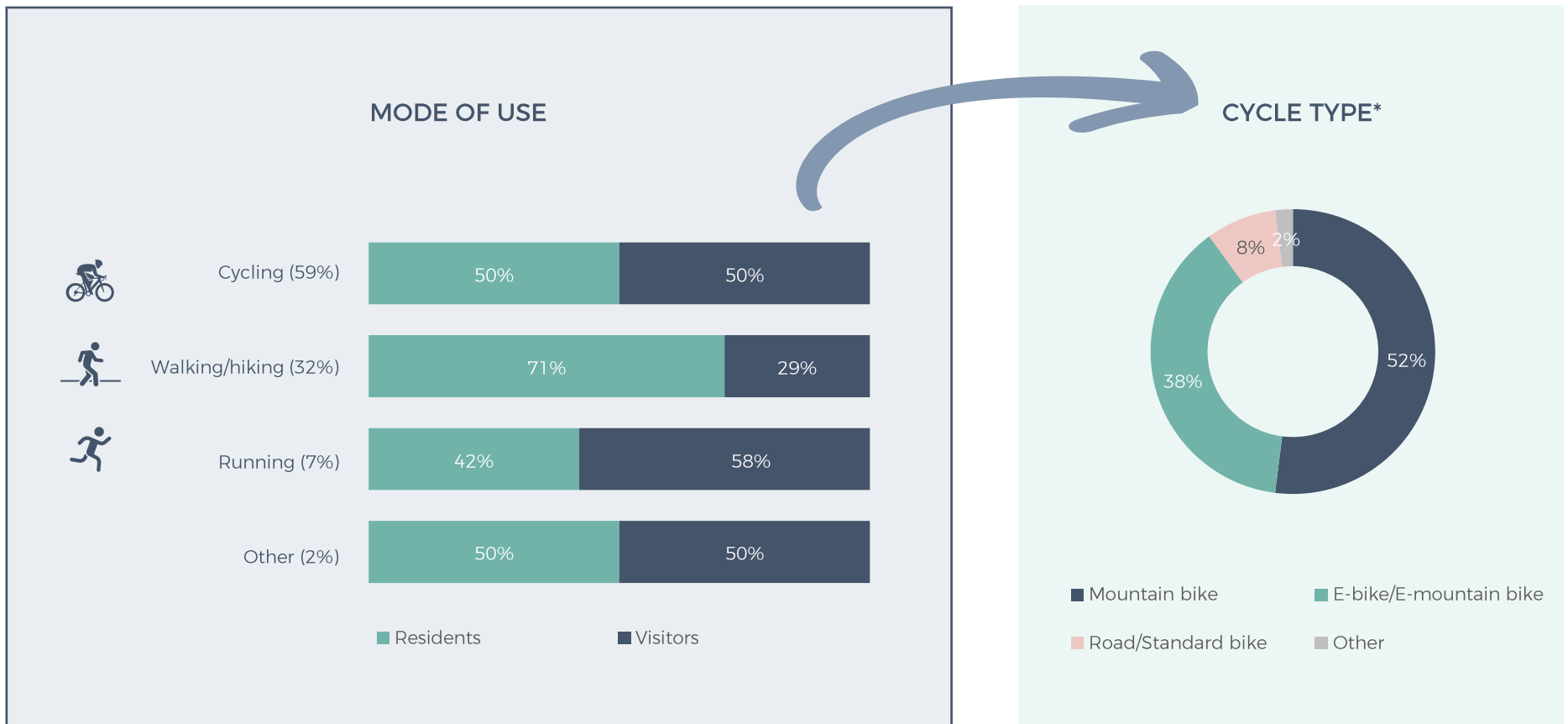
<sup>1</sup> Calculated using a combination of counter data supplied by Fiordland Trails Trust and trail user survey data. Based on patterns of reported trail use, survey data indicates that trail users are counted an average of 3.22 times by counters on the trail (including 5% of trail users who aren't counted at all). The total trail counts for the year ending March 2023 (n=104,904) have therefore been divided by 3.22 to arrive at an estimate of unique trips taken by trail users (n=32,560).



# TRAIL USAGE

'Last trip' survey data indicates that cycling and walking/hiking are the two most popular modes of use of the trail, with 59% of all survey respondents having cycled and 32% having walked/hiked on their most recent experience.

More than half (52%) of trail users who cycled the Lake2Lake Trail rode a mountain bike on their most recent cycle trip, and another 38% rode an e-bike or e-mountain bike.



# TRAIL USAGE (CONT.)



The survey data indicates that the DOC Visitor Centre is both the most common entry and exit point for users of the Lake2Lake Trail. However, a significant number of trail users also exit at Manapouri or at interim access points along the trail.

## Entry / Exit points

	Entry point	Exit point
DOC Visitor Centre	46% <b>1</b>	23% <b>1</b>
Marakura Yacht Club	9%	4%
Te Anau Bird Sanctuary	6%	5%
Tui Bay Rest Area	3%	2%
Kepler Track car park and shelter (Golf Course Road)	9%	9%
Lake Te Anau Control Gates / Waiau River	9%	10%
Yerex Reach access track	0%	1%
Queens Reach Road	2%	8%
Link track - opposite Mount York Road	1%	1%
Kepler Track car park and shelter (Rainbow Reach Road)	3%	7%
Balloon Loop Road	1%	3%
Supply Bay Road	1%	3%
Mahara Avenue	0%	0%
Frasers Beach Road	1%	2%
Manapouri	8%	18%
Other	3%	3%
Base: Total sample		n=311

# TRAIL USAGE (CONT.)



One in four trail users reported they had completed the entire trail on their most recent trip. The remaining 75% of trail users most commonly complete Sections 2-3, 3-4, 4-5 and/or 5-6 at the Northern end of the Lake2Lake Trail.

## Complete sections

Complete sections	%
1-2: DOC Visitor Centre to Marakura Yacht Club	37%
2-3: Marakura Yacht Club to Te Anau Bird Sanctuary	42% <span style="background-color: #2e8b57; color: white; border-radius: 50%; padding: 2px 5px;">2</span>
3-4: Te Anau Bird Sanctuary to Tui Bay Rest Area	41% <span style="background-color: #e91e63; color: white; border-radius: 50%; padding: 2px 5px;">3</span>
4-5: Tui Bay Rest Area to Kepler Track car park and shelter (Golf Course Road)	41% <span style="background-color: #e91e63; color: white; border-radius: 50%; padding: 2px 5px;">3</span>
5-6: Kepler Track car park and shelter (Golf Course Road) to Lake Te Anau Control Gates / Waiau River	44% <span style="background-color: #0070c0; color: white; border-radius: 50%; padding: 2px 5px;">1</span>
6-7: Lake Te Anau Control Gates / Waiau River to Yerex Reach access track	33%
7-8: Yerex Reach access track to Queens Reach Road	28%
8-9: Queens Reach Road to Link track	21%
9-10: Link track to Kepler Track car park and shelter (Rainbow Reach Road)	18%
10-11: Kepler Track car park and shelter (Rainbow Reach Road) to Balloon Loop Road	13%
11-12: Balloon Loop Road to Supply Bay Road	5%
12-13: Supply Bay Road to Mahara Avenue	5%
13-14: Mahara Avenue to Frasers Beach Road	7%
14-15: Frasers Beach Road to Manapouri	8%
1-15 (the entire trail)	25%
<b>Base: Total sample</b>	<b>n=311</b>

## TRAIL USAGE (CONT.)

'Last trip' survey data indicates that food and beverage services, and accommodation on/near the trail, are the services most commonly used by trail users.

Not surprisingly, visitors are more likely than residents to use these facilities and services in association with their trail experience.

### FACILITIES/SERVICES USED

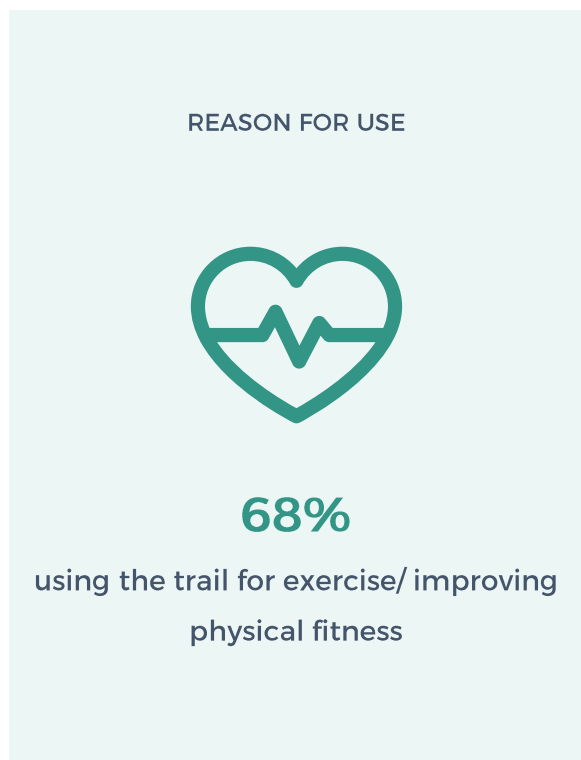
	Total Sample	Residents	Visitors	Cycling	Walking/hiking	Running
Food and beverage services on/near the trail	37%	16% ▼	57% ▲	44%	30%	10% ▼
Accommodation on/near the trail	33%	4% ▼	61% ▲	35%	34%	14%
Bike hire	7%	3% ▼	11%	11%	-	-
Other activities on/near the trail (e.g., cruise, glow worm caves, kayaking, museum)	6%	1% ▼	11%	5%	7%	5%
Bike shuttle or other transport to/from the trail	4%	1% ▼	7%	5%	1%	-
Jet boat shuttle to / from the trail	3%	1%	5%	2%	6%	-
Guide	-	-	1%	1%	-	-
Other facilities or services	6%	3%	9%	5%	8%	-
None of these	50%	79% ▲	21% ▼	45%	52%	76% ▲
Base:	n=311	n=152	n=159	n=184	n=100	n=21

## REASON FOR TRAIL USE

Almost seven out of ten (68%) users reported that exercise/improving physical fitness was a reason for their last trail experience. Other common reasons for using the Lake2Lake Trail were spending time outdoors/in the natural environment, for relaxation/peace/mental health, and improving overall physical health.

While similar for the most part, there were some differences in the motivations of local and visiting trail users. Sightseeing and experiencing/learning about the natural environment were both significantly more important to visiting trail users than to residents, while exercise/improving physical fitness and walking a dog were more often motivations for local trail users.

As the trail user survey was undertaken at a time when no events were held, the extent of event-related use shown below is likely to be under-stated. As outlined on page 24, at least 1,700 (or 5%) of the estimated 32,560 trail trips in the year ending March 2023 are likely to have been taken by event participants.



	Total Sample	Residents	Visitors
For exercise/improving physical fitness	68%	78% ▲	58% ▼
To be in the outdoors in nature / in the natural environment	57%	51%	62%
For relaxation/peace and quiet	44%	46%	42%
To improve physical health	37%	41%	32%
To improve my mental health	36%	43%	29%
Sightseeing	32%	11% ▼	53% ▲
To spend time/socialise with friends or family	28%	30%	26%
To experience or learn about the natural environment	17%	8% ▼	26% ▲
Walking a dog	11%	21% ▲	2% ▼
Training for an event	10%	13%	7%
To experience or learn about the local culture and heritage	5%	2%	8%
Participating in an event	3%	3%	3%
Paid working (part of my job)	2%	3%	1%
Other	4%	1%	0%
<b>Base:</b>	<b>n=311</b>	<b>n=152</b>	<b>n=159</b>

## OVERALL SATISFACTION

Lake2Lake Trail users expressed very high levels of satisfaction with their trail experience, with four in five (82%) rating their experience 8, 9 or 10 on a 10-point satisfaction scale. The average satisfaction rating overall was 8.7/10.

	Total sample
10 (Very Satisfied)	43%
9	18%
8	21%
7	8%
6	4%
5	4%
4	0%
3	1%
2	0%
1 (Very Dissatisfied)	0%
<b>Average</b>	<b>8.7</b>




**82%** of users rate their trail experience 8, 9 or 10 (out of 10)

- There is no difference between the levels of satisfaction of residents and visitors, with both having an average of 8.7 (out of 10).
- Older users are more likely to be satisfied with their trail experience than younger trail users.
- Female users are more likely to be satisfied with their trail experience than male trail users.
- Satisfaction of those users who have walked the trail is similar to those who have cycled, with average satisfaction scores of 8.7 and 8.6 respectively.

# NET PROMOTER SCORE

These very high levels of trail user satisfaction were reflected in a Net Promoter Score (NPS)\* of +62.

		Total sample
Promoters	10 (Extremely likely)	59%
	9	13%
Passive	8	12%
	7	7%
Detractors	6	3%
	5	4%
	4	2%
	3	0%
	2	1%
	1	0%
0 (Not at all likely)		0%
<b>NPS</b>		<b>+62</b>



**+62**  
Net Promoter Score

- The NPS is slightly higher amongst resident users (at +64) than visitors (+61).
- Corresponding with their higher levels of satisfaction, the NPS is higher both amongst older users and females than amongst younger trail users and males.
- The NPS is also slightly higher amongst those who have cycled the trail than those who have walked/hiked the trail.

\*Net Promoter Score (NPS) is an indicator used globally to measure customer engagement and advocacy, based on the likelihood of a customer recommending a given product or service. Any positive score means there are more loyal advocates willing to recommend the product or service (promoters) than unhappy critics (detractors). A passive customer is satisfied, but unenthusiastic. A high score of +100 means that every customer is a promoter, while a low score of -100 means that every customer is a detractor.

# ECONOMIC IMPACT





## ECONOMIC IMPACT

### Direct Economic Contribution

The Lake2Lake Trail makes a **direct economic contribution** through the expenditure of visitors who might not otherwise have travelled to Fiordland, and by encouraging those visiting for other reasons to stay longer to experience the Trail while they're there.

Events are a significant driver of visitation, attracting not only event participants, but accompanying 'supporters', and people involved in the delivery of events (including staff, volunteers, officials, representatives of sponsor organisations and others).

In-district expenditure by event organisers – for example, on transport services, advertising and signage, or equipment hire – can also be counted as a direct contribution to Fiordland's economy if the funds used are sourced from outside the District (for example, from entry fees paid by people living in other regions, or sponsorship by organisations based elsewhere).

Similarly, in-district expenditure by the Fiordland Trails Trust – and others involved in trail development and maintenance – can be considered a direct contribution to Fiordland's economy if the funds used are 'new expenditure' (i.e., not simply diverted from another local use) or sourced from outside of the District.

### Indirect Economic Contribution

**Indirect economic contribution** refers to the jobs created and the flow-on effect that results from the re-spending of money by households and businesses within the local economy. Also referred to as 'the multiplier effect', this is the additional economic impact created as a result of the direct economic contribution made.

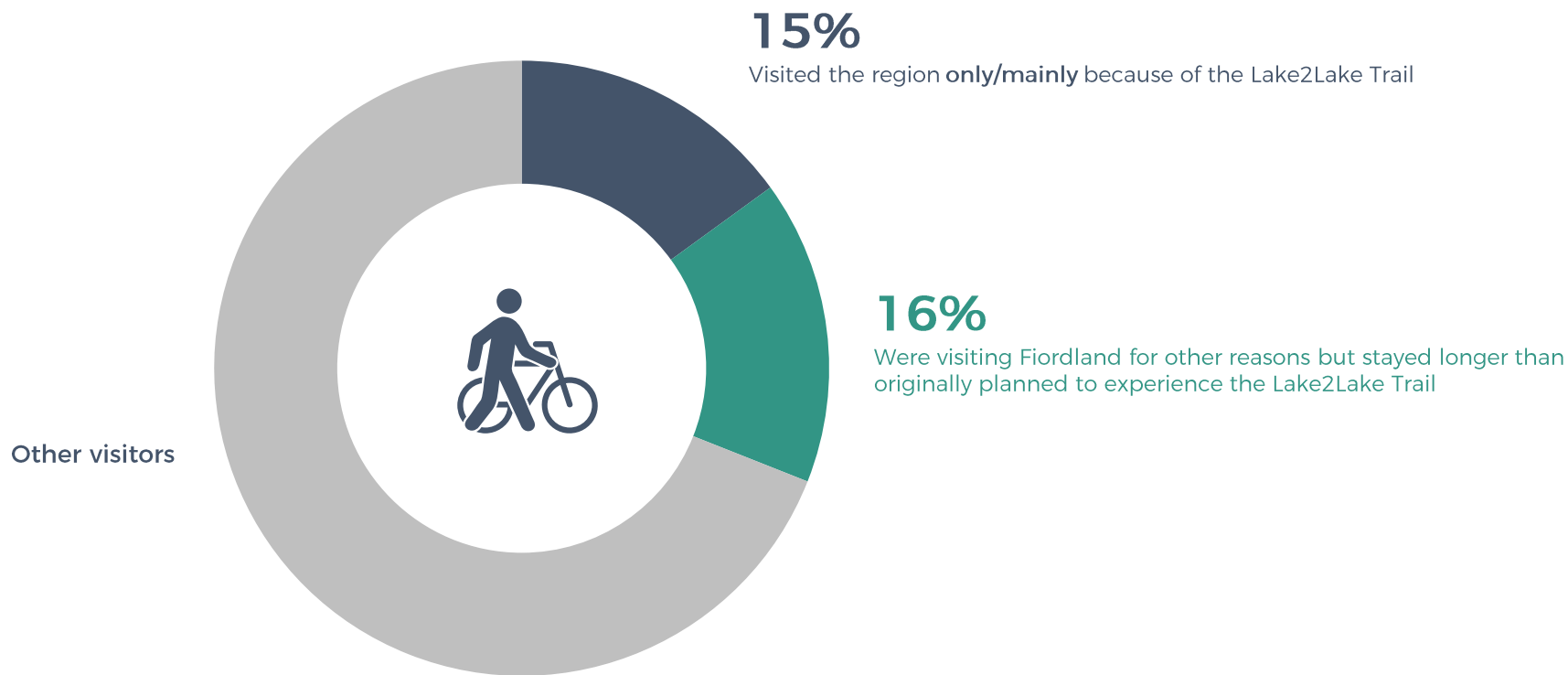


## DIRECT ECONOMIC CONTRIBUTION – VISITOR EXPENDITURE

### Visitors Attributable to the Trail

As noted on page 8, visitors account for 51% of Lake2Lake trail trips. Economic impact accrues from the expenditure of trail users who visit Fiordland **only or mainly because of the Lake2Lake Trail** AND from those who visit for other reasons but then **stay longer than planned in order to experience the Lake2Lake Trail**.

Trail user survey data shows that **15% of visiting trail users** had travelled to Fiordland only/mainly to experience the Lake2Lake Trail. A further 16% were visiting for other reasons but decided to extend their stay in the Fiordland area to experience the trail. The majority of both groups of visitors stayed overnight in Fiordland.





## DIRECT ECONOMIC CONTRIBUTION – VISITOR EXPENDITURE (CONT.)

### Visitor Nights Attributable to the Trail

Given this, we estimate that a total of **2,491 visitors** in the year to March 2023 travelled to Fiordland **only/mainly because of the Lake2Lake Trail**.<sup>1</sup>

A further 2,657 visitors extended their stay in the area in order to experience the trail, accounting for an extra 3,454 nights in the area.

In total then, **more than 5,000 visitors and 10,000 visitor nights** can be attributed to the Lake2Lake Trail.

		Mainly because of Lake2Lake Trail	Not mainly because of Lake2Lake Trail but stayed longer	TOTAL
	Number of visitors	2,491	2,657	5,148
	Average visitor nights per person	2.7	1.3	
	Total visitor nights	6,725	3,454	10,179

# DIRECT ECONOMIC CONTRIBUTION – VISITOR EXPENDITURE (CONT.)

## Visitor Expenditure Attributable to the Trail (visitors travelling to Fiordland only/mainly because of the Trail)

Using a combination of trail user survey data and counter data, we estimate that those who visited Fiordland **only/mainly because of the Lake2Lake Trail** contributed more than \$1 million in new expenditure to the area in the year ending March 2023.<sup>1</sup> Accommodation and food/meals/drinks accounted for the largest proportions of expenditure.



**\$1,033,699**  
Total visitor expenditure

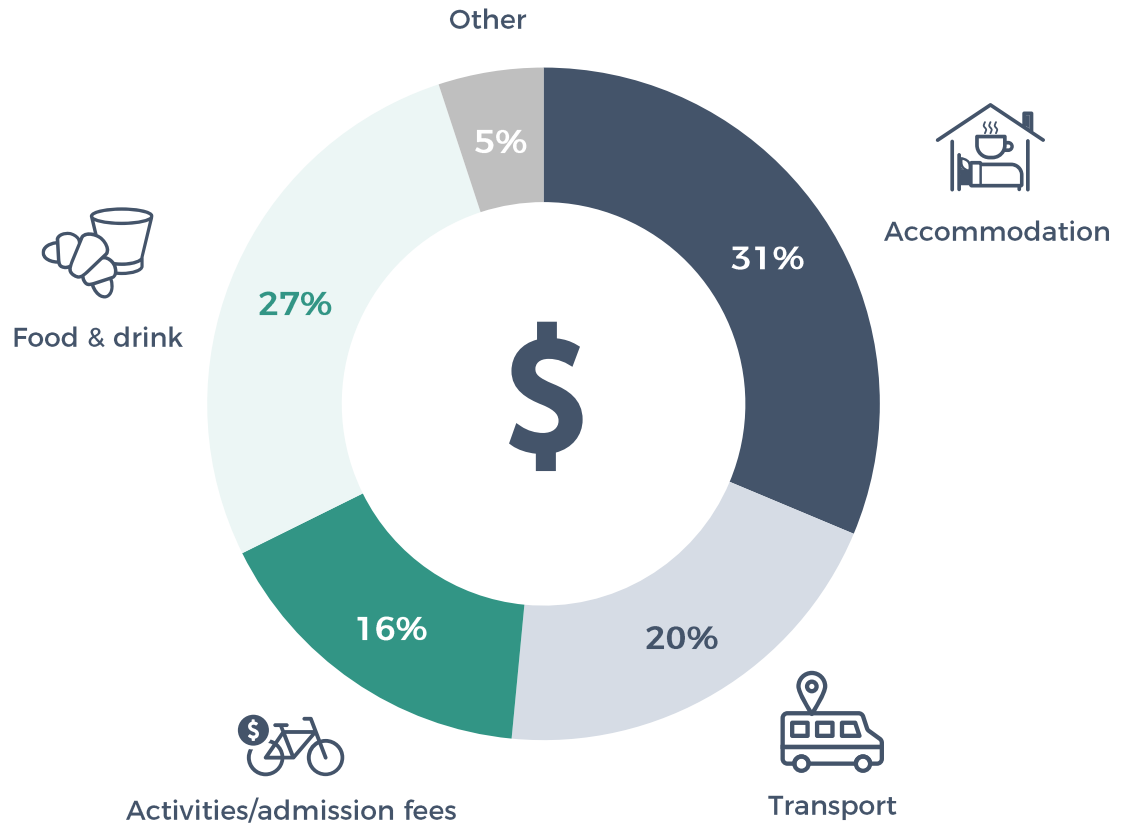


**\$415**  
average expenditure per person



**\$154**  
average expenditure per person per night

### BREAKDOWN OF VISITOR EXPENDITURE

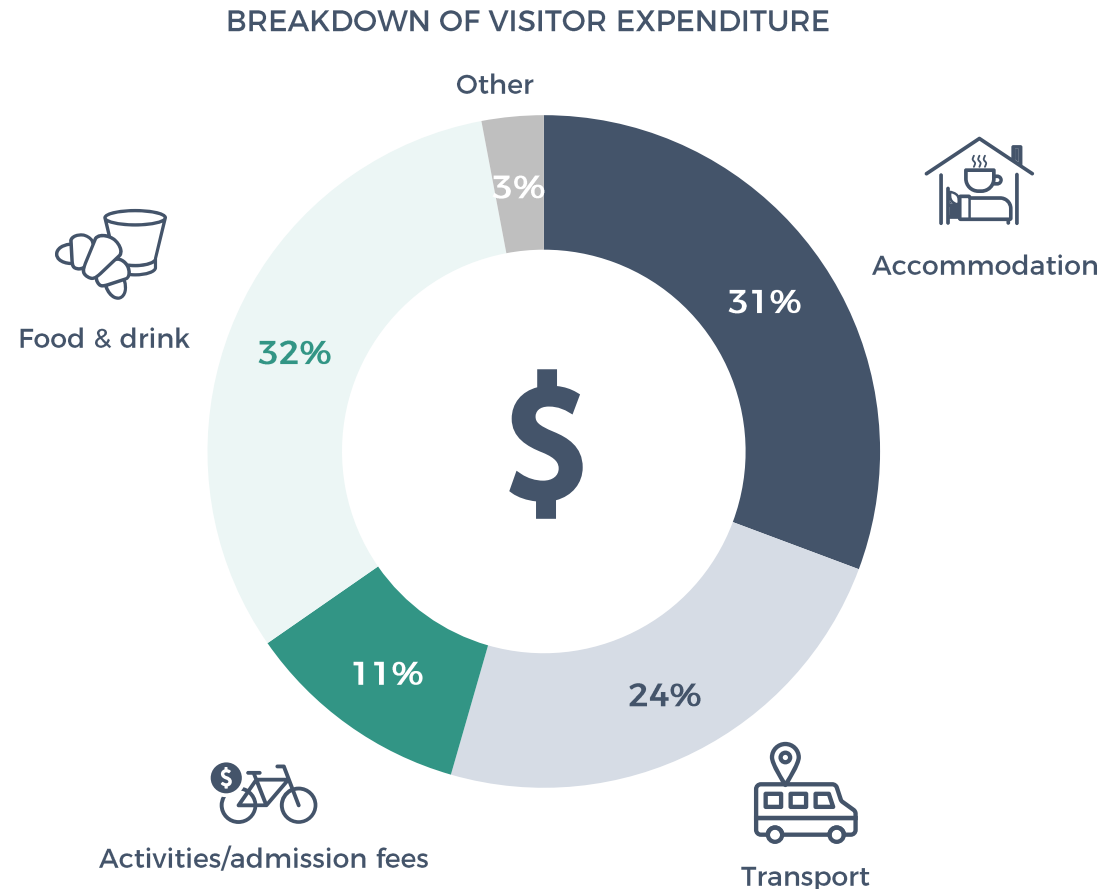


<sup>1</sup> Total expenditure of visitors for whom the Lake2Lake Trail was the main/only reason for their visit to Fiordland is calculated by taking the total number of those visitors and multiplying this number by the average per person expenditure reported by respondents to the Trail User survey. Source Trail User Survey - Sample: visiting the region mainly/only because of the trail (n=24).

# DIRECT ECONOMIC CONTRIBUTION – VISITOR EXPENDITURE (CONT.)

## Visitor Expenditure Attributable to the Trail (visitors staying longer to experience the trail)

Using a combination of trail user survey data and counter data, we estimate that **those who stayed longer to experience the trail** (but for whom the Lake2Lake Trail was NOT the main reason for their visit), contributed an additional \$762,000 in new expenditure to the area in the year ending March 2023.<sup>1</sup> The largest proportion of this additional expenditure attributable to the trail was spent on food/meals/drinks and accommodation.



<sup>1</sup> Total expenditure of visitors for whom the Lake2Lake Trail was not the main reason for visit but who stayed longer to experience the trail is calculated by taking the total number of those visitors and multiplying this number by the average per person expenditure reported by respondents to the Trail User survey. Source Trail User Survey - Sample: visiting the region not because of the trail but stayed longer to experience the trail (n=26).

## DIRECT ECONOMIC CONTRIBUTION – VISITOR EXPENDITURE (CONT.)

### Visitor Expenditure Attributable to the Trail

The expenditure of visitors attributable to the Lake2Lake Trail is spread across all sectors of the economy, suggesting that the economic impact of this activity is widely felt. In the year to March 2023, in-region expenditure averaged \$415 per visitor who travelled to Fiordland only/mainly because of the Lake2Lake Trail, and \$287 per visitor staying longer to experience the Trail.<sup>1</sup>

In-region expenditure	Mainly because of the Lake2Lake Trail		Not mainly because of the Trail but stayed longer to experience	
	Average Spend <sup>1</sup>	%	Average Spend <sup>1</sup>	%
Accommodation	\$129	31%	\$88	31%
Petrol/fuel	\$29	7%	\$23	8%
Transport to/from the trail	\$30	7%	\$6	2%
Other transport	\$26	6%	\$40	14%
Activities/admission fees	\$29	7%	\$8	3%
Other activities/admission fees	\$36	9%	\$22	8%
Cafes/restaurants/bars/eating out	\$84	20%	\$56	20%
Snacks/groceries	\$30	7%	\$36	12%
Other expenditure	\$23	5%	\$9	3%
<b>Total Expenditure</b>	<b>\$415</b>		<b>\$287</b>	

<sup>1</sup> Average expenditure reported per person by respondents to the Trail User survey. The average is calculated taking into account expenditure for adults (each adult assigned a value of 1 in the calculation) and children (each child assigned a value of 0.5 in the calculation). Data is collected for the individual respondent or group of which they are part (by respondent preference) and broken down across the range of categories shown. Source – Trail User Survey Sample: visiting the region mainly/only because of the trail (n=24), visiting the region not because of the trail but stayed longer to experience the trail (n=26). **Note small sample sizes, data is indicative and not conclusive.**

## DIRECT ECONOMIC CONTRIBUTION – VISITOR EXPENDITURE (CONT.)

Combined, and taking into account the estimated number of visitors attributable to the trail, visitor nights and average expenditure per night, the direct economic contribution accruing as a result of visitor expenditure in Fiordland was **almost \$1.8 million in the year ending March 2023.**



Type of visitors	Expenditure	%
Mainly because of the Lake2Lake Trail	1,033,699	58%
Not mainly because of the Lake2Lake Trail but stay longer to experience the trail	762,530	42%
<b>Total</b>	<b>1,796,229</b>	

## DIRECT ECONOMIC CONTRIBUTION – EVENTS

The Lake2Lake Trail was used for a number of events in the year to March 2023, including the Mitre 10 Te Anau 10 km (August 2022), Meridian Hydro Half Marathon (run in conjunction with the Te Anau 10 km in August), Spring Challenge women's adventure race (September/October 2022), and GODZone adventure race (February/March 2023). Detailed information is not available to support a full impact analysis of every event but the following are indicative of impact.

### Mitre 10 Te Anau 10km (Aug 2022, Fiordland Trails Trust)

#### Visitor Expenditure

- 288 participants, 243 from outside of Fiordland
- 387 supporters/spectators from outside of Fiordland
- 2 paid event staff and 3 volunteers from outside of Fiordland
- Participants and supporters/spectators spent an average of 2 nights per person in Fiordland
- Excluding event participants (already accounted for in visitor expenditure), and assuming average daily expenditure of \$176 per person per night for supporters/spectators and staff/volunteers (as for event participants), this equates to a direct economic contribution to Fiordland of \$137,984

#### Event Expenditure

- Event delivery was funded primarily from Grants (Regional Event Fund - \$25,000), sponsorship (\$12,300) and by entry registrations (\$32,630) with the great majority of funding from sources outside Fiordland
- Considering event-related expenditure that occurred in Fiordland adds approximately \$24,700 in direct economic impact

**Estimated Direct Economic Contribution of Event: \$162,684**

### Meridian Hydro Half Marathon (Aug 2022, Fiordland Trails Trust)

#### Visitor Expenditure

- 230 participants, 185 (80%) from outside of Fiordland
- 292 supporters/spectators from outside of Fiordland (est. 80% of total)
- 2 paid event staff and 3 volunteers from outside of Fiordland
- Participants and supporters/spectators spent an average of 2 nights per person in Fiordland
- Excluding event participants (already accounted for in visitor expenditure), and assuming average daily expenditure of \$176 per person per night for supporters/spectators and staff/volunteers (as for event participants), this equates to a direct economic contribution to Fiordland of \$104,544

#### Event Expenditure

- Event delivery was funded primarily from sponsorship (\$12,000) sourced from outside of the District and event registrations (\$100 pp or \$18,500 for the 185 non-resident participants)
- Around 50% of event-related expenditure was paid to suppliers in Fiordland: this adds approximately \$15,250 in direct economic impact

**Estimated Direct Economic Contribution of Event: \$119,794**



## DIRECT ECONOMIC CONTRIBUTION – EVENTS

### Spring Challenge (Sep/Oct 2022, Ten Events)

#### Visitor Expenditure

- 1440 participants, 1400 from outside of Fiordland
- An estimated 1 supporter/accompanying person per competitor (=1400 accompanying visitors from outside of Fiordland)
- 120 event staff, all from outside of Fiordland
- Visitors spent an estimated average of 2.2 nights per person in Fiordland and an average of \$185 per person per day
- Excluding event participants (already accounted for in visitor expenditure), the direct economic contribution made by visitors accompanying participants and event staff is estimated to be \$618,640

#### Event Expenditure

- The event delivery was funded primarily by entry fees, of which an estimated 15% (approximately \$80,000) was spent in Fiordland

**Estimated Direct Economic Contribution of Event: \$698,640**

Acknowledgement: with special thanks to Nathan Fa'avae

**Mitre 10 Te Anau 10 km**

\$162,684

+

**Meridian Hydro Half Marathon**

\$119,794

+

**Spring Challenge**

\$698,640

=

**Estimate for Three Events**

\$981,118

## DIRECT ECONOMIC CONTRIBUTION – EXPENDITURE BY TRAIL MANAGER

A direct economic contribution also accrues to Fiordland from expenditure on Lake2Lake Trail development and maintenance, when the funds to support this work are sourced from outside of the District.

In the year to March 2023, Fiordland Trails Trust secured \$450,000 in Jobs for Nature funding through the Department of Conservation. Approximately \$235,000 of this funding was expended locally and therefore represents a net contribution to the District.

Of other funds secured to support the trail development and maintenance activities of the Trust - the great majority from outside of Fiordland - a further \$8,900 (approximately) was spent locally.

This takes the direct economic contribution made by the operation of the Fiordland Trails Trust to **almost \$245,000 for the year to March 2023.**

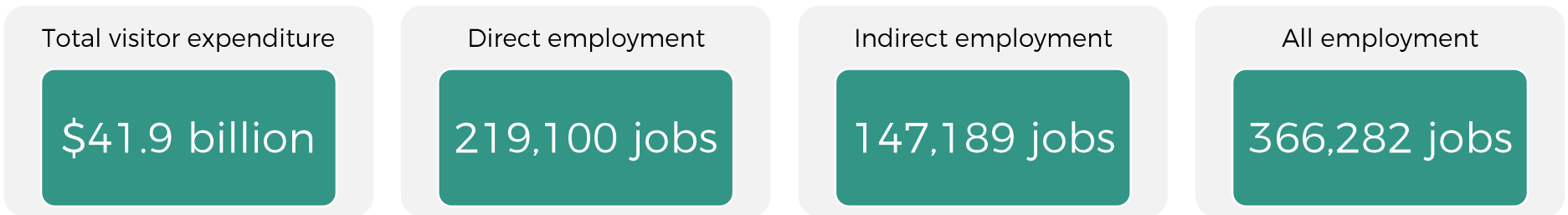


## INDIRECT ECONOMIC CONTRIBUTION

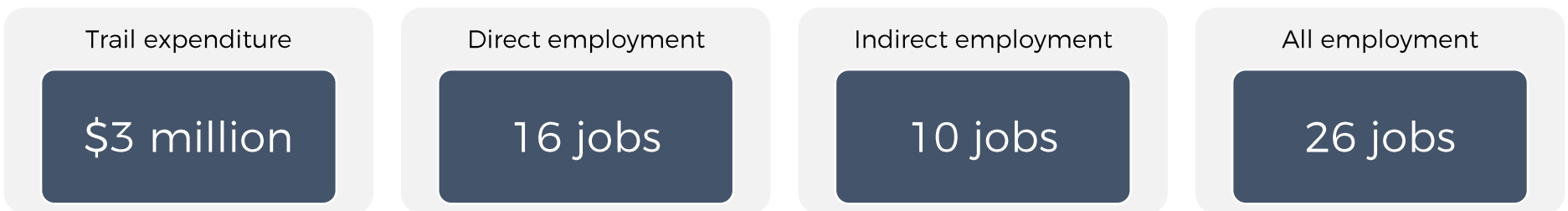
There is insufficient regional-level data available to support a comprehensive analysis of the indirect economic contribution made by the Lake2Lake Trail. However, by drawing upon data from the Ministry of Business, Innovation & Employment’s Regional Tourism Estimates<sup>1</sup> and data from Stats New Zealand’s Tourism Satellite Account<sup>2</sup>, we have estimated that the Lake2Lake Trail supports **26 full-time equivalent jobs in Fiordland**: 16 directly (e.g. in accommodation services, tour guides) and 10 indirectly (e.g. in supermarkets and other retail stores). This is based on the relationship between tourism expenditure and employment (broadly one job for every \$114,392 of tourism expenditure) as measured prior to COVID.

Note that pre-COVID data was used to exclude skews relating to the closure of New Zealand’s international borders and the impacts of lockdowns etc on domestic travel patterns.

### New Zealand



### Fiordland (expenditure attributable to the Lake2Lake Trail)



<sup>1</sup> MBIE, Regional Tourism Estimates, year ending November 2019.

<sup>2</sup> Stats NZ, Tourism Satellite Account, YE March 2020.

# INDIRECT ECONOMIC CONTRIBUTION - EMPLOYMENT

As a snapshot of the Trail's contribution to employment in the District, the nine businesses that participated in the stakeholder survey each employed an average of almost nine people. Two of these businesses employed the same number of people year-round, while seven had some element of seasonality in their workforce.

One of the businesses had increased full-time staff as a result of the opening of the Lake2Lake Trail; two had increased the number of part-time staff.



## IMPACT OF CYCLE TRAIL ON ESTABLISHED BUSINESSES

**1 business**  
Increased the number of full-time staff  
(+1 full-time staff)

**2 businesses**  
Increased the number of part-time staff  
(+2 part-time staff on average)

All Seasonal Businesses	
Full-time staff	Average of staff employed
Peak season	11.9
Off-peak season	5.6
Part-time staff	Average of staff employed
Peak season	4.7
Off-peak season	2.0
Base:	n=7

A typical peak season encompasses October-March/April.

# INDIRECT ECONOMIC CONTRIBUTION – ENTERPRISE DEVELOPMENT


All businesses that responded to the stakeholder survey (n=9) had been established prior to the formal opening of the Lake2Lake Trail in 2016. However more than half of these businesses had expanded/added new services subsequently, in most cases at least partly **because of** the opening of the Lake2Lake Trail.




9 businesses pre-dated the Lake2Lake Trail

Operating Area	
Commercial accommodation	4
Other facilities or services	2
Cycle hire	1
Other	2

### BUSINESS EXPANSION



**5 businesses**  
Have expanded or added new services



**4 businesses**  
Have expanded/added services partly because of the Lake2Lake Trail

Area of Expansion	
Cycle transport/shuttle services	2
Cycle hire	1
Food and beverage services	1
Other	2

## INDIRECT ECONOMIC CONTRIBUTION – ENTERPRISE DEVELOPMENT (CONT.)

When asked about the impact that the opening of the Lake2Lake Trail had had on their business, five of the nine businesses reported a positive contribution in relation to the number of customers served, six had seen increased income/turnover, four had seen an increase in average customer expenditure and four a positive contribution to their bottom line (business profit). As an indicator of flow-on effects, four of the nine businesses also indicated that their business expenditure had increased.

### IMPACT OF LAKE2LAKE TRAIL

(on businesses that pre-dated the opening of the trail)



**5 businesses**

Increased the number of  
customers served by the business



**4 businesses**

Increased the average  
spend per customer



**6 businesses**

Increased the income/turnover  
generated by business



**4 businesses**

Increased expenditure by the  
business

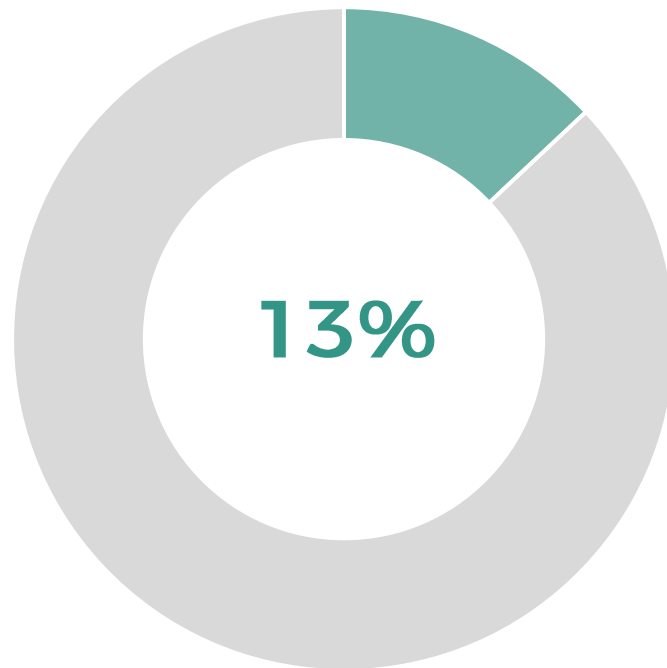


**4 businesses**

Increased their business' profit

## INDIRECT ECONOMIC CONTRIBUTION – ENTERPRISE DEVELOPMENT (CONT.)

On average, the nine businesses participating in the stakeholder survey reported that 13% of their turnover could be attributed to the Lake2Lake Trail: equating to more than \$71,000 per business.



of revenue attributed to the Lake2Lake Trail  
(\$71,667 per business\*)

# OTHER IMPACTS



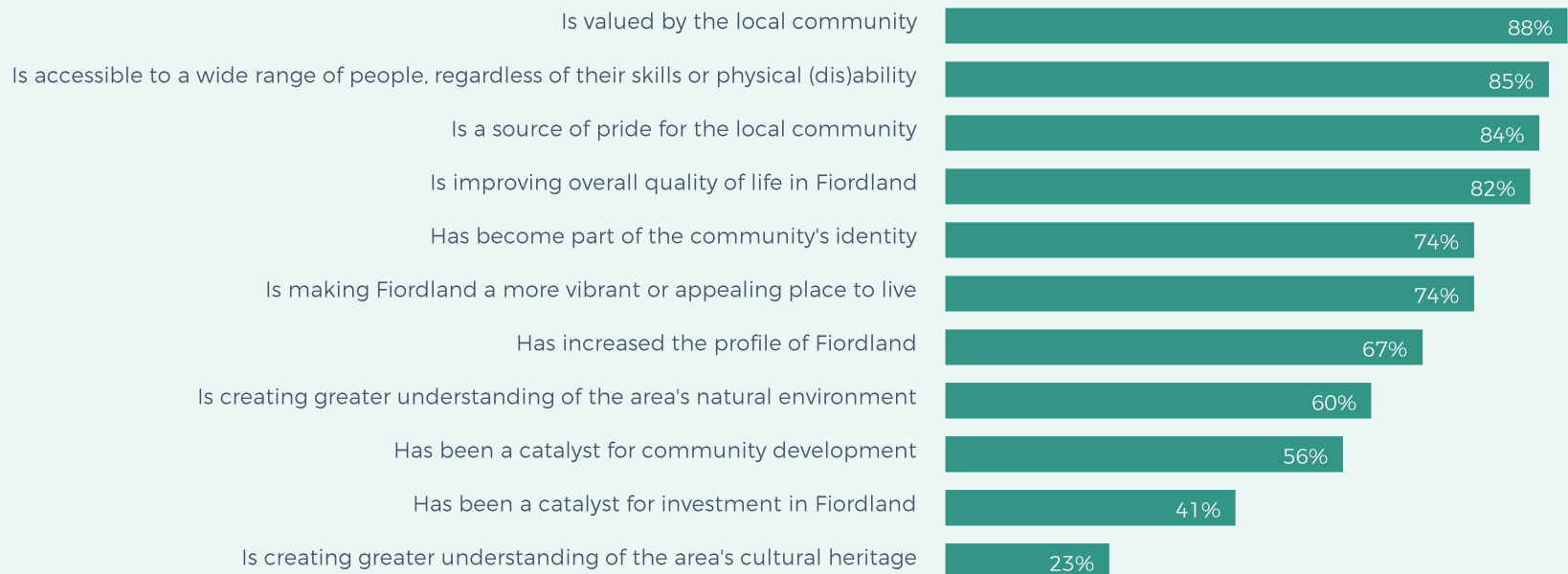


## COMMUNITY IMPACTS – LOCAL RESIDENTS

To understand other impacts, both trail users living in Fiordland and trail stakeholders were asked to respond to a set of statements that described a range of ways in which the Lake2Lake Trail could affect Fiordland and its residents. For each statement, local trail users and stakeholders were asked to identify the extent to which they agreed or disagreed, using a 10-point scale.

The trail is widely valued by the trail user community. It is seen as accessible to a wide range of people, a source of pride for the community, and a contributor to improving the overall quality of life in Fiordland. Almost three-quarters of trail users agree that the Lake2Lake Trail has become part of the community's identity and that it is making Fiordland a more vibrant or appealing place to live. Furthermore, more than half of the Fiordland residents responding to the trail user survey agree that the Lake2Lake Trail has been a catalyst for community development, and 40% that it has helped to stimulate investment in the region.

### % WHO AGREE THAT THE LAKE2LAKE TRAIL...



## COMMUNITY IMPACTS – STAKEHOLDERS

Strong support for the Lake2Lake Trail is also evident in the views of organisations that contributed to the stakeholder survey. More than half of stakeholders agreed with all impact statements, but they were almost unanimous in their view that the trail is valued by the community and has provided new recreational opportunities for local residents.

More than half of the businesses that contributed to the stakeholder survey agreed that the trail has **benefited their business**.



## REGIONAL DEVELOPMENT - STAKEHOLDERS

Stakeholders were also asked to comment on the extent to which the Lake2Lake Trail had been a factor in drawing people to live, work, study and/or play in the area.

Findings indicate that the Lake2Lake Trail is seen as a significant factor in attracting visitors to the area, and that it also plays a role in drawing people to live, do business and invest in Fiordland.

### % WHO BELIEVE LAKE2LAKE TRAIL IS AN IMPORTANT FACTOR IN...



**76%**

attracting visitors  
to the area



**33%**

attracting people to  
live in the area



**17%**

attracting people to  
study in the area



**39%**

attracting people to do  
business or invest in the area

# ADDITIONAL BENEFITS



## HUMAN CAPITAL (SKILLS, KNOWLEDGE, PHYSICAL AND MENTAL WELLBEING)

The Health (and other) benefits of multi-use trails (Human Capital) are documented in the Southland District Council hearing evidence presented by Dr Stephen Hoskin in (June 2022) and include: -

- The health benefits of physical activity are well founded and enhance both mental and physical health.
- The Lake2Lake trail makes physical activity appealing, convenient, free, accessible, social, and caters to a wide range of users. It is safe, practical, and set in a natural environment.
- Sporting events are another means to encourage physical activity.
- Active NZ surveys show paths, cycleways and walkways are the most popular type of infrastructure used for sport and recreation.
- Local and visiting schools use the existing Lake2Lake Trail to teach cycling skills and encourage physical activity.
- The natural setting is appealing to users and there is evidence for further mental health benefits by accessing green spaces.
- A safe trail separated from traffic reduces the chance of injury when undertaking the physical activity and it removes the safety concern barrier for those unwilling to undertake activity near vehicles.

Stakeholders consulted for this Impact Assessment described the following human capital impacts of the Lake2Lake trail.

- Safe and easy exercise, in fresh air and in nature.
- Accessible for everyone, not just the young and fit – the trail is for cyclists, walkers, runners, dog walkers, pram pushers, mobility scooters.
- Improved physical health and fitness.
- Improved mental health and well being; benefits of green and blue prescriptions / fresh air reduces anxiety.
- Strong social component. Cycle groups, including the 'Old Buggers Club', who meet up with their E-Bikes to ride, chat, spend time together, go for a coffee or lunch and meet new people.
- Development of new skills for children; learning to confidently ride a bike.
- Improves self esteem and confidence for those who take up riding later in life or for health reasons.

Trail Users describe the positive impacts on their mental and physical wellbeing from exercising, in the fresh air and socialising with friends and family. Users enjoy the peace and quiet and feel rested, with a restored sense of self and improved mental health.

## NATURAL CAPITAL (ENVIRONMENTAL BENEFITS)

The Natural Capital (Environmental) benefits of multi-use trails (Human Capital) are documented in the Southland District Council hearing evidence presented by Dr Stephen Hoskin in (June 2022).

Climate change is harming and threatens to further harm peoples' health. The trail counters this harm in several ways.

- It provides a low carbon tourism activity.
- It provides a recreational opportunity for locals from their doorstep, without having to use a vehicle.
- It provides an active commuting option.
- The Trust project includes planting thousands of permanent trees that will capture carbon.
- Fifthly, it promotes conservation values. People using the trail experience natural environments, realise their value and are more likely to act to protect them.
- The Trust also plans to install interpretation panels that tell conservation stories and to control pest plant and animal species along the trail corridor, which further enhances our natural environment.

A bonus for Trail Users is the access to nature and wildlife which can be seen from the trail.

Stakeholders describe the following natural capital impacts of the Lake2Lake trail.

- Building the trail has caused some environmental / biodiversity damage, but this has been far outweighed by the benefits / greater good / what the trail gives back.
- The trail is narrow (compared to a road) and a significant improvement on the 4wd / grader / motorbike track (and fly tipping) preceding it, and which had a much more negative impact.
- (Cycle) trail developers have got into trouble in the past, so everything is done 'properly' now, including being sensitive to environmental impacts, being aware of terrain and biodiversity of an area, mitigating any risk to the best of their ability when building / planning trails and regular ecological reporting.
- The Lake2Lake Trail is sustainable, low impact tourism, and has opened a beautiful area that people could not previously access. It exposes them to new scenery / landscapes (wetlands / original habitats), which creates a better appreciation of the natural environment.
- The trail gives everyday people access to places so they can conduct environmental work; volunteer groups can help with weed clearing and predator programmes. There are sometimes new discoveries (versus unconsciously destroying something).
- A lot of work has been done on the side of the Waiau River to the benefit of the environment and a programme of planting natives and more bird life is evident on the trail.
- There have not been the spill over riders into the National Park (on to the Kepler Track) or no more than there were previously (which had been a concern.)

## SOCIAL CAPITAL (COMMUNITY / SOCIOECONOMIC BENEFITS)

The Social Capital (Community) and Socioeconomic Benefits of a proposed Multi Use Trail are documented in SDC hearing evidence presented by Dr Stephen Hoskin in (June 2022).

### Social Capital

- Accessibility / inclusivity / diversity - the (proposed) trail width maximises the number of people the trail will cater to. A narrower trail risks excluding parents with babies in prams; parents with children in a bike trailer; children developing their cycling skills; and the disabled.
- Social benefits – riding in pairs, people walking in groups and chatting.

### Socioeconomic (indirect health) benefits (Financial and Physical Capital)

- The proposed trail provides an attraction that will bring domestic and international tourists to the Te Anau basin, helping provide economic and health benefits.
- Locals also contribute by purchasing and maintaining cycles and other equipment for physical activity.
- Also, reduced absenteeism, trail construction, trail maintenance, events, and reduced fuel costs.

Trail Users also describe the Lake2Lake Trail as an important community asset and resource which is used and enjoyed by a range of people and groups, including locals and visitors, and for many purposes.

Stakeholders describe the following social capital (community) impacts of the Lake2Lake trail.

It is an important community facility / resource and is for the greater good:

- The trail appeals to and benefits the whole community, including older people, and is regularly used (not just a one off for local people).
- The school uses the trail; there has been a big effort into helping children learn to ride.
- It is a free facility / activity for locals and visitors (though visitors spend money elsewhere when they use the trail.)
- It is a community venue for local events. For example, the Park Run every Saturday.

The trail enhances community spirit and wellbeing:

- The Lake2Lake trail was envisaged, planned, and developed by locals; who *“have skin in the game”* and care about it. Volunteers built and maintain the trail and there is a sense of community pride, shared success and sense of place... *“Look what we have on our doorstep.”*
- The trail brings people together. It is a family friendly activity, which can be combined with a picnic or a spot of fishing. It is accessible for all ages and abilities which makes it more marketable.

Furthermore, the trail compares favourably to some other trails which are challenging and risky and unsuitable for children / novice riders, and which limits their appeal to a certain demographic / rider.

## FINANCIAL AND PHYSICAL CAPITAL (ECONOMIC BENEFITS)

Stakeholders describe the following economic impacts of the Lake2Lake trail.

- It is an important resource, which adds value to and enhances the current Te Anau / Manapouri offering.

*“Te Anau has so much ... the lake, the mountains, the Bird Park ... it is so tranquil and quiet. It is amazing what they have got already, and the cycle trail just adds to that.”*

- There is a real opportunity to piggyback off the boom in cycling. Visitors come to Te Anau to do the Lake2Lake Trail, including an increasing number of “... *moneyed up baby boomers.*”
- Stakeholders describe ‘bike tourists’ as generally wealthier and higher spenders than other tourists. They expect better facilities and spend more. They may recommend the trail to others and come back multiple times.

*“The cycling community spend money ... especially the older demographics with money to spend.”*

- The trail hosts events, which attracts money spending visitors. For example, the Hydro Half Marathon.

- The trail supports the local economy. It brings money into the town / Southland via tourists from other parts of NZ, keeps money in Te Anau and feeds into a circular economy ...

*“ ... the hospitality venue contracts a builder to do some work, who contracts the sparky to work with them, who gets his truck fixed at the local MTA workshop, who takes their family out for a meal at the hospitality venue ...”*

- New businesses and experiences are opening (or expanding); including bike hire and shuttle services. And there are more opportunities for creative and lateral product and service development and ‘collaboration’ with other groups. For example:
  - Creating sustainability ‘stories / outings’: Meridian (sustainable energy) and Trail (sustainable transport).
  - Environmental / volunteer tours by bike, with a guide, to see native planting, birds and the biodiversity, ecology of the area.
  - Showcasing cultural, natural beauty and heritage; telling Te Anau stories and explaining to people what they are looking at.
  - Bike hire / guide / picnic / fly fishing ... experiences.



# FUTURE DEVELOPMENT

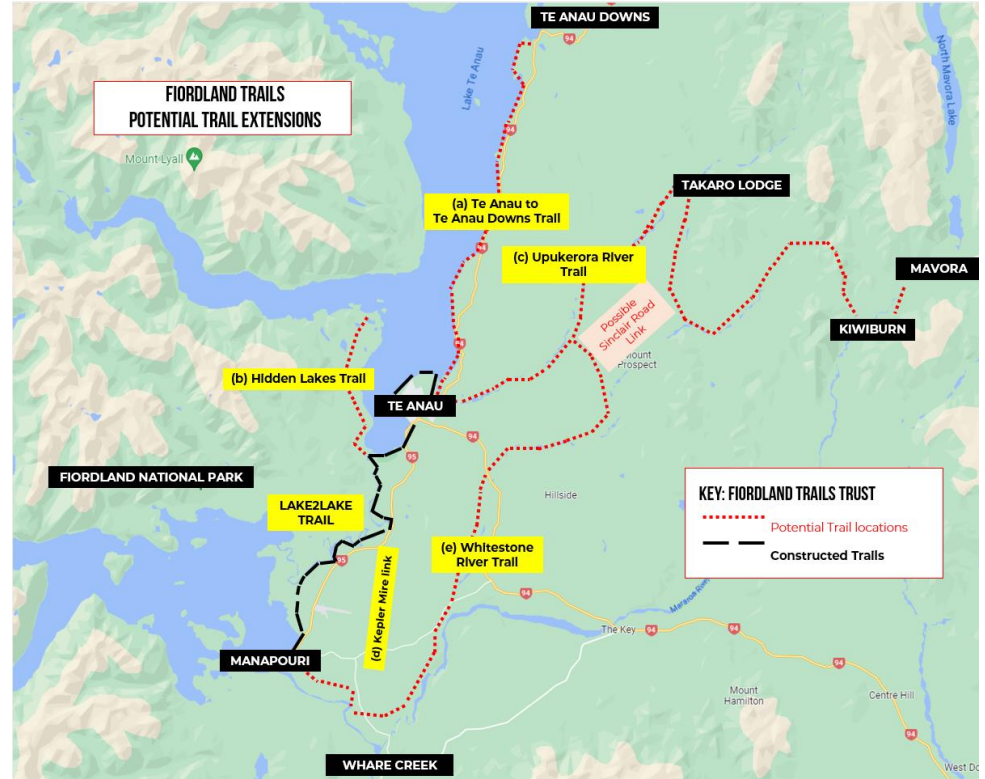


# FIORDLAND TRAILS - POTENTIAL TRAIL EXTENSIONS — TRAIL USER VIEW

When asked about their likelihood of using five proposed trail extensions, trail users expressed the strongest interest in the Hidden Lakes and Te Anau to Te Anau Downs options. A strong majority indicated they would be very likely/likely to use these trails if they were developed; 81% and 78% respectively.

Almost three-quarters of trail users also expressed support for the Kepler Mire and Whitestone River Trail extensions (73% and 71% respectively).

Trail users were generally less inclined to support the Upukerora River Trail, although 59% still said they would be very likely/likely to use it.



		Total Sample	Residents	Visitors	Cycling	Walking/hiking	Running
Te Anau to Te Anau Downs	2	78%	81%	76%	86%	61%	90%
Hidden Lakes	1	81%	83%	79%	88%	66%	100%
Upukerora River Trail	5	59%	67%	50%	66%	41%	75%
Kepler Mire	3	73%	74%	71%	78%	62%	65%
Whitestone River Trail	4	71%	74%	67%	80%	53%	70%
Base:		n=311	n=152	n=159	n=184	n=100	n=21

# FIORDLAND TRAILS – POTENTIAL TRAIL EXTENSIONS – STAKEHOLDER VIEW

Asked about their support for the proposed trail extensions, stakeholders showed the strongest support for the Whitestone River Trail and Te Anau to Te Anau Downs options, with 85% and 83% respectively indicating that they strongly support/support these developments.

Alongside many other potential benefits, providing new recreational opportunities for local residents and attracting more visitors to the area are seen as key benefits of the proposed trail extensions. More than half of the businesses surveyed agreed that proposed trail extensions would also be good for their business.



Benefit of trail extensions	Stakeholders
Provide new recreational opportunities for local residents	91%
Attract more visitors to the area	89%
Be of value to the local community	83%
Increase the profile of the area	77%
Become part of the community's identity	74%
Attract more visitors to the area during the off-peak and shoulder seasons	71%
Bring new events to the area	71%
Help to stimulate the local economy	66%
Make the area a more vibrant and friendly place to live	63%
Provide new 'active transport' options for local residents	57%
Attract more people to live in the area	54%
Attract more people to do business or invest in the area	54%
Increase employment in the area	46%
Attract more people to study in the area	29%
<i>For business only*</i>	
Be good for my business	56%
Base:	n=35

## HIGHLIGHTS FOR TRAIL USERS

Asked to comment on the highlights of their Lake2Lake Trail experience, 50% of those who gave feedback mentioned the scenery and spectacular views of the mountains, river, bush and forest. A bonus is the access to nature and wildlife which can be seen from the trail.

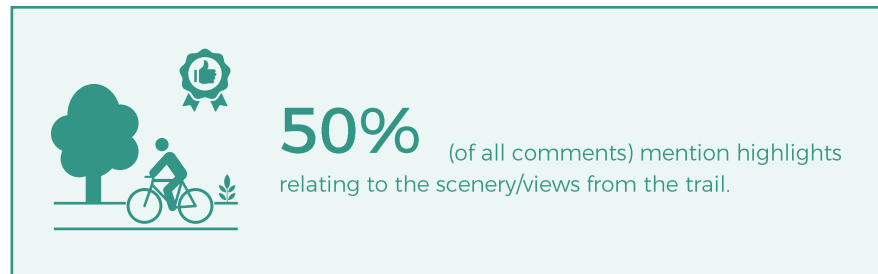
45% of comments related to trail construction, design and maintenance, which is mostly of high quality and enjoyable to ride on. The trail is easily accessible from multiple points and has access to good services and facilities.

In many places, the trail is relatively empty, and users enjoyed peace, quiet and solitude riding/walking in a beautiful location, with few people and little noise. Users feel rested, with a restored sense of self and improved mental health.

Other trail users are generally friendly and displayed good trail etiquette. Users accepted it is a shared use track and that all users (riders and walkers / runners) have a right to enjoy the trail in safety and comfort.

Some users could not name one highlight and described the holistic experience which lends itself to an all-round enjoyable trail experience. This included a combination of the highlights described above, plus the positive impacts on their mental and physical wellbeing from physical exercise, in the fresh air and socialising with friends and family.

Another highlight is that the Lake2Lake Trail is an important community asset and resource. It is used and enjoyed by a range of people and groups, including locals and visitors, and for many purposes. Several residents praised the work of the Fiordland Trails Trust, DOC, and wider community groups, who have worked tirelessly to develop the trail and with the drive and vision to develop and improve it further.



	Total sample
Scenery / views	50%
Trail construction & design	45%
All round enjoyable experience	14%
Quiet and peaceful	10%
Nature & wildlife	8%
Other trail users	3%
Other (accessible community asset & resource, mixed use (walking), allow dogs, off road (mostly))	11%
Base*	n=228

## OPPORTUNITIES FOR IMPROVEMENT – TRAIL USERS

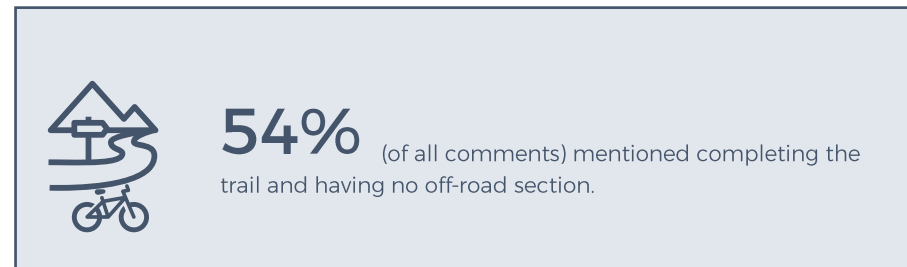
While trail users were mostly complimentary and positively disposed toward the Lake2Lake Trail - as evidenced by high satisfaction rates and Net Promoter Scores - when asked what opportunities there are to improve their experience, a significant proportion (54% of all comments) requested that the trail be 'finished' or joined up and that there is no on-road section. While only a small section of the trail, the road section is a disproportionate drawback for users. It is dissonant with the overall trail experience (peace, quiet, safe) and a source of concern for more nervous users and those with young families.

21% of responses called for improved and safer trail construction, including controlling the direction of traffic and encouraging cyclists to ride on the left and not to cut corners.

Some criticised aspects of the trail design, which is narrow in parts, with difficult gradients and corners. Several respondents suggested employing the services of a professional trail designer to provide input and advice into any future trail development.

Some aspects of track maintenance need addressing, including trimming vegetation and making the trail more 'rideable' by smoothing / removing ruts, potholes and tracks made in the deep gravel (which can be difficult to navigate). A couple of respondents called for more signage and care when weed spraying as spray had drifted onto them.

Providing more facilities on the trail (improved signage, information, more toilets, water stations, bike racks, benches and picnic areas) and more services supporting the trail network (food and beverage) will lend themselves to a more leisurely trail experience for some users.



	Total sample
Trail completed (no on-road section)	54%
Improved trail construction	21%
More facilities! (signage / information / water / benches / toilets / food / beverages / bike racks)	13%
Educating other trail users about sharing the trail.	5%
Improved trail maintenance	4%
Other (Social riding opportunities / better weather / trail extended to Milford / cycling in The National Park / professional trail design / dirt bike ban / more community consultation)	11%
Base*	n=166



fiordland  
**trails** trust

angus  
& ASSOCIATES