



OTAGO CENTRAL RAIL TRAIL



USER SURVEY 2014-15

Central Otago District Council
May 2015

Table of Contents

Background	3
Major Results	4
Overview	6
Data confidence	6
External Data	8
a) Rail Trail usage.	8
Observed Data	9
a) Daily trail counts	9
b) Time of day.....	10
c) Direction of travel	10
d) Age and gender.....	10
Surveyed Data	12
a) Where do people come from?	12
b) Learning about the Otago Central Rail Trail	15
c) Extent of Use.....	16
d) Time of Year.....	18
e) Time in the District and on the Trail.....	19
f) Other Activities undertaken	21
g) Matching expectations.....	22
h) Rating the Trail experience.....	23
i) Opportunities to improve the experience	23
j) Expenditure	26
k) Economic Impact.....	27
l) Final Thoughts.....	28
Appendix 1: How well the Rail Trail met expectations (Question 13)	33
Appendix 2: Aspects of the experience (Question 14).....	34
Appendix 3: Survey questionnaire	45

Background

This report presents analysis of a series of 3 surveys carried out over the spring, summer and autumn of 2014-15 on Otago Central Rail Trail. As far as possible the questions and the methodology of their analysis has closely followed that of the 2011 and 2008 surveys carried out to enable meaningful comparison.

The series of 3 surveys are referred to collectively as the 2014-15 survey, and were carried out in November-December 2014, January-February 2015 and April 2015.

Face to face surveys were carried out at Seagull Hut near Wedderburn.



Major Results

1. The estimated economic impact of the Otago Central Rail Trail on the Otago and Central Otago economy is presented below:

Impact Summary	Direct	Total
Output	\$6,906,855	\$10,398,110
GDP	\$3,553,253	\$5,270,786
Employment (FTE's)	81.0	102.4

Comparing expenditure across the three surveys, the 2014/15 data represents a 15-16% decrease in expenditure, GDP and FTEs compared to 2011, but a 44% increase in output, 49% increase in GDP, and a 37% increase in FTEs compared to the 2008 survey.

The main driver for the decrease from 2011 is the drop in the annual number of users recorded at the Wedderburn site – 20% less people were recorded in 2014 compared to 2010.

In contrast, per person expenditure reported in the 2014/15 survey had increased by 5.5% from the 2010/11 survey and 30% from the 2008 survey (though these figures have not been CPI-adjusted).

2. As observed in previous surveys, the largest economic impacts are on the areas of accommodation and package operators, whereas entertainment and retail were only minor beneficiaries of visitor spend.
3. Visitors continue to rate their overall rail trail experience very positively, at 9.0 out of a possible 10. This is consistent with the overall 2008/09 and 2010/11 experience ratings. Ratings for package operators have consistently improved over this time and was rated 9.5 out of a possible 10 in this survey. The Rail Trail's 'match with expectation' was also relatively consistent with previous surveys (at 8.8 out of a possible 10). Riders surveyed in autumn tended to rate their 'match with expectation' higher than those surveyed in spring or summer.
4. People using the Rail Trail, as captured at the Wedderburn survey point, are predominantly biking the entire trail, and are travelling from Clyde to Middlemarch. Most are experiencing the Rail Trail for the first time and there is roughly a 50:50 split between males and females.
5. People over 30 years of age are the most common users. The average age of people surveyed was 41 years, which is younger than the 2010/11 (44.5 years) and 2008/09 (43.5 years) surveys.
6. In contrast with previous surveys, international users comprised 39% of people surveyed – this compares to 22% in 2011 and 20% in 2008. The main international source is Australia, followed by Europe – this again is a shift from the 2011 survey where Europe generated the most international visitors.
7. Consistent with previous surveys, the upper North Island is the most common source for domestic users. In fact, North Island visitors comprised nearly two thirds of domestic users.

8. Autumn was the most popular time of year for domestic visitors to use the Rail Trail, whereas international visitors favoured the spring and summer. This observation was the same in the 2010/11 survey.
9. Word of mouth remains the main way that people first hear about the Rail Trail, and this is particularly so for domestic users. A number of international visitors also discover the Rail Trail through the internet and via organised tours. Both international and domestic visitors are relying on websites and social media to find out more information about the Trail, and this preference has increased since previous surveys.
10. Visitors to the region are spending an average of 3.8 nights in the region – this is slightly more than observed in the 2011 survey (3.6 nights) but on par with the 2008 survey (3.8 nights). Consistent with previous surveys, the 50+ age group tend to spend more nights in Central Otago than other age groups. However this survey has also observed a slight average increase in the <16 and 30-50 year-old age groups as well.
11. Approximately half of the people surveyed travelled through South Island airports when making their way to Central Otago – this was the most common mode of transport for both international and domestic users. Queenstown airport was the most popular airport choice.
12. A range of accommodation types are used while staying in the region. Homestays, B&B's and boutique lodges are the most popular overall, and comprised nearly two-thirds of international visitor responses. Nearly all users cited accommodation options that were based in Central Otago district, rather than Queenstown or Wanaka.
13. Rail Trail users are spending 3.5 days, on average, riding the Rail Trail. This is the same as the 2011 survey. As with the previous surveys, visitors tended to spend longer on the trail in autumn than spring or summer. Taieri Gorge Railway and curling are popular activities for these visitors, as are visiting heritage sites and wineries, and going walking.
14. This year's survey requested users' opinions on whether electric bikes (or e-bikes) should be permitted on the Rail. Two-thirds of respondents thought electric bikes should be allowed, though a number commented that restrictions – such as limiting use to elderly or less physically capable people, and on speed and/or noise – should also be imposed.
15. Comments provided by survey respondents were generally very positive, particularly regards the overall rail trail experience. Feedback regards package operators was very positive. Feedback regards accommodation included a desire for more budget options. There was a mix of feedback regarding surface condition; this could be related to people's expectation of the surface.

Overview

This survey is made up of 3 sub surveys, as the previous 2008 and 2011 surveys. The 3 sub surveys were carried out as follows:

- Survey 1: Early December 2014 (Spring)
- Survey 2: Early February 2015 (Summer)
- Survey 3: Mid April 2015 (Autumn)

224 surveys were completed, representing a total of 662 people.

Survey questions have been analysed either by total survey counts or by total people represented by the survey. For some questions the total responses were lower than the total survey count / the total people represented, or multiple answers were given. In such cases the total responses are used.

A copy of the survey is attached as Appendix 3.



Data confidence

A total of 224 surveys were completed. These surveys represented the views and opinions of 662 people riding or walking the Otago Central Rail Trail during the 2014/15 season.

The following table shows the sampling % and the associated confidence interval (95%) that can be applied to outcomes.

Survey	Spring (Oct-Dec 2014)	Summer (Jan-Feb 2015)	Autumn (Mar-Apr 2015)	Full Year (Apr 2014- Apr 2015)
Total Counter Wedderburn ¹	3,256	3,472	4,775	14,956
Sample survey	158	255	249	662
Period sample %	4.9%	7.3%	5.2%	4.4%
Confidence interval (95% confidence level)	7.61%	5.91%	6.05%	3.72%

As an example of what this indicates, when looking at the total sample of all three blocks of survey, there is a $\pm 3.7\%$ margin of error around the outcome. When considering the gender split (50.4% male), we can be 95% confident that males make up between 46.7% and 54.1% of all trail users at Seagull Hill. The previous two surveys had a margin of error of $\pm 3.8\%$, meaning that we were 95% confident that males comprised between $54.2\% \pm 3.8\% = [50.4\% \text{ to } 58.0\%]$ in the 2010/11 survey, and $47.4\% \pm 3.8\% = [43.6\% \text{ to } 51.2\%]$ in the 2008/09 survey.

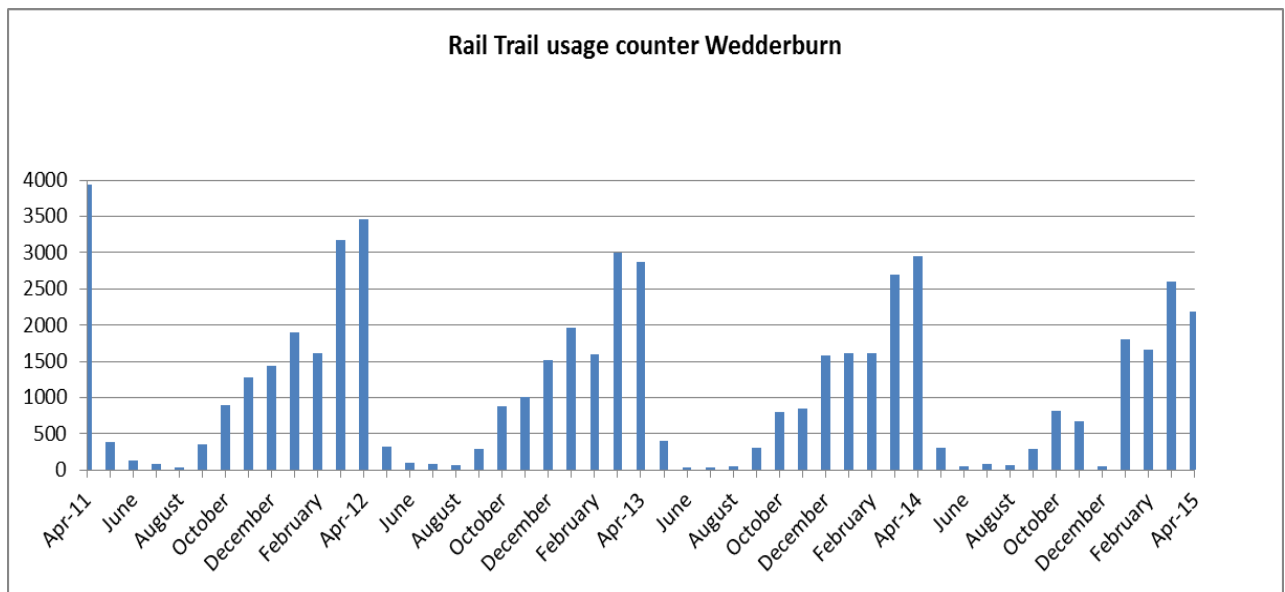
As the data gets broken into smaller parts and as we start considering multiple factors (such as age and where people are from) the margin of error increases, meaning that it is increasingly difficult to say with certainty that a result is statistically significant. Results derived only from the main population should be afforded some confidence as $\pm 3.8\%$ represents a relatively small margin of error.

¹ The December 2014 count for Wedderburn was questionably low (55 counts), so it was replaced with a projection for that month. This projection followed the trend from previous years - the percentage that December data comprised in comparison with the November and January, across 2011, 2012 & 2013. This projected count for December 2014 was 1780.

External Data

a) Rail Trail usage.

Figures are provided by Department of Conservation.



The user count suggests a slight decline the number of users over the last 3 years at the Wedderburn location.

The actual user count recorded at the Wedderburn track counter for the 2014 calendar year was 11,159. For the 12 months to April 2015 the count was 11,318.

The count for December 2014 is questionably low (55 counts which is lower than the survey sample for that period). A projection has therefore been applied following the trend from previous years – namely, the percentage that December data comprised in comparison with the November and January, across 2011, 2012 & 2013. This calculates the count for December 2014 as 1,780. Using this projection, the total annual population applied to the economic impact assessment was 12,582 – this is an average of the 2014 calendar year count (12,884), and the April 2014-April 2015 count (12,280).

These counts do not claim to be the total number of riders undertaking the full trail. However, it is assumed that there will be the same proportion of riders completing either the full trail or part of it, as was observed.

Comparing track annual count data with the 2010/11 survey indicates an average decrease of around 2,800 users per annum at the Wedderburn site.

Observed Data

a) Daily trail counts

The surveyors maintained count sheets and recorded rail trail users – their means and direction of travel, and time of day.

Survey	Date	Bike (from Clyde)	Walk (from Clyde)	Bike (from MM)	Walk (from MM)	TOTAL
1	1/12/2014	60	0	9	0	69
	2/12/2014	50	1	2	0	53
	3/12/2014	54	0	7	0	61
	4/12/2014	57	0	1	0	58
	5/12/2014	23	0	2	0	25
	6/12/2014	17	0	6	0	23
Total 1		261	1	27	0	289
2	2/02/2015	35	0	7	0	42
	3/02/2015	29	0	15	0	44
	4/02/2015	29	0	10	0	39
	5/02/2015	12	0	2	0	14
	6/02/2015	82	0	5	0	87
	7/02/2015	93	3	56	0	152
Total 2		280	3	95	0	378
3	13/04/2015	26	0	11	0	37
	14/04/2015	57	0	4	0	61
	15/04/2015	48	0	12	0	60
	16/04/2015	68	0	1	0	69
	17/04/2015	53	0	8	0	61
	18/04/2015	69	0	8	0	77
Total 3		321	0	44	0	365
Total		862	4	166	0	1,032

The highest and lowest daily counts were both in early February 2015. The highest number of users were recorded on February 7th (152), whereas the lowest number of users were recorded just two days previously on February 5th (14) – it is unclear why such an irregularly small count was recorded on this day.

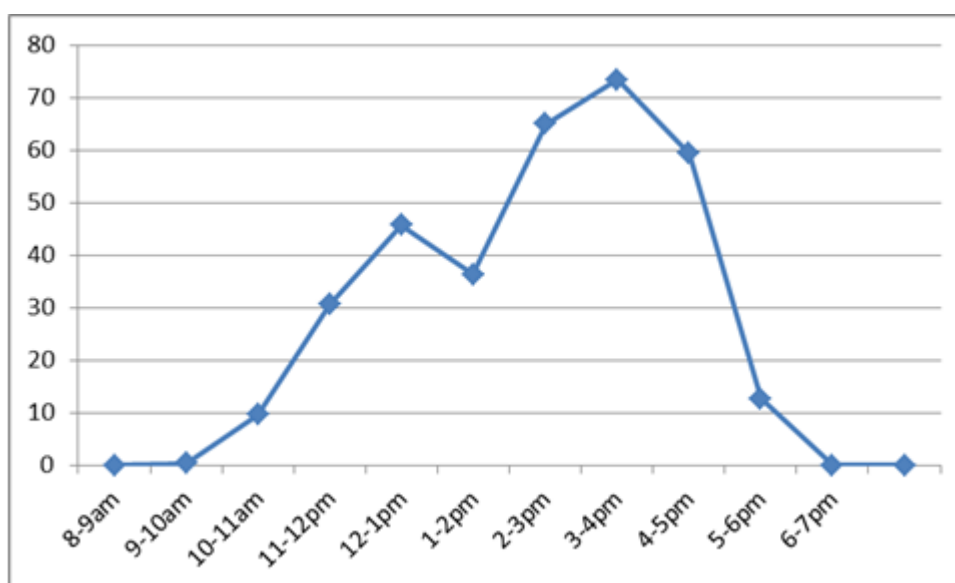
There was a snow storm on April 13th which does explain the lower-than-usual count on that day.

The summer daily counts were the highest overall, followed by autumn and then spring. This varies from 2011 data, where autumn had significantly higher daily counts than the other two months.

There were very few walkers observed at the Seagull Hut count point (4 from the Clyde direction).



b) Time of day



The graph above shows the average daily counts per hour, across all daily counts. The peaks in usage are late morning and in the middle of the afternoon.

c) Direction of travel

Direction from	Survey 1	Survey 2	Survey 3	Total
Clyde	75%	79%	92%	82%
Middlemarch	25%	21%	8%	18%
Total number of surveys	55	87	65	207

This question was completed by 207 surveys. Overall 82% of rail trailers were travelling from the Clyde end. This compares to the 2011 survey where 72% of people travelled in that direction. The 2008 survey also saw the majority of people travelling in that direction.

d) Age and gender

Age group	Survey 1	Survey 2	Survey 3	Total
<16	5	24	34	63
16-30	58	49	35	142
30-50	38	63	103	204
50+	57	119	77	253
Total	158	255	249	662

The age splits for the survey differ slightly from the 2011 survey – the largest age demographic is still the 50+ age group, though only 38% of respondents fitted this category (compared to 53% in the 2011 survey), whereas the proportion of 30-50 year old respondents increased in proportion to 31% (compared to 21% in 2011).

Gender	Survey 1	Survey 2	Survey 3	Total
Male	90	124	119	333
Female	71	126	130	327
Total	161	250	249	660

The table above presents the total number of people represented in the survey, whose gender was noted. The gender split is almost 50%. While this split differs slightly from the 2011 survey (where males comprised 54.2% of respondents), this variation is not statistically significant.



Surveyed Data

a) Where do people come from?

Question 1: Where are you from²?

The table below is sorted by age group. A total of 660 people were represented in survey responses that provided answers for both place of origin and age group³.

Where from	<16	16-30	30-50	50+	Total	%
Domestic	39	48	141	172	400	61
Upper NI	22	17	68	69	176	
Lower NI	8	7	35	32	82	
Upper SI	1	8	16	7	32	
Canterbury	4	6	9	49	68	
Otago	2	10	9	12	33	
Local	2		2		4	
Southland			2	3	5	
International	24	87	61	88	260	39
Australia	2	14	31	54	101	
Europe		36	16	14	66	
South Africa	20				20	
UK		5	7	2	14	
USA		4	2	8	14	
Canada		2	1	7	10	
Middle East			4		4	
Other	2	26		3	31	
Total	63	135	202	260	660	100%

Where from	<16	16-30	30-50	50+	Total
North Island	48%	18%	51%	40%	40%
South Island	14%	18%	19%	28%	22%
International	38%	64%	30%	32%	39%

- 61% of respondents were domestic users. This compares to 78% in 2011 and 80% in 2008.
- As in 2011, the largest single source of people visiting the rail trail was from the Upper North Island.
- North Island visitors comprised nearly two-thirds of domestic users surveyed (64.5%). This compares to 40% in the 2011 survey.
- The main international source of users was Australia, followed by Europe. This is a change from 2011 when Europe was the largest source, followed by Australia.
- The 2011 survey included North America as a category, and this represented 9% of international visitors. The 2014-15 survey split USA and Canada into separate

² The summary to this question isn't totally precise, in that a group could identify itself from coming from a number of places. In that case the decision was made to use the 1st identified home place. This follows suit with the 2011 methodology.

³ An entry for 2 people from Canada did not state age groups and were omitted from this analysis.

categories, although their combined representation again comprised 9% of international visitors.

- South Africa’s respondents comprised 20 students visiting via Cromwell College.
- The international category “Other” comprised 31 people from a Worldwide Rotary exchange (via Rotorua), 28 pupils (<16 years & 16-30 years) and 3 people 50+ years of age.

Where from	Survey 1	Survey 2	Survey 3	Total
Domestic	57	128	215	400
Upper NI	22	34	120	176
Canterbury		42	26	68
Otago	8	20	5	33
Lower NI	6	22	54	82
Local		3	1	4
Southland	2	3		5
Upper SI	19	4	9	32
International	101	127	34	262
Australia	43	52	6	101
Europe	21	25	20	66
South Africa		20		20
UK		14		14
USA	3	10	1	14
Canada	3		7	10
Middle East		4		4
Asia		2		2
Other	31			31
Total	158	255	249	662

The table above presents total people represented by the survey.

- Domestic visitors preferred to ride the trail in autumn (‘Survey 3’); this mirrors the 2011 survey.
- International visitors preferred to ride the trail in spring (‘Survey 1’) and summer (‘Survey 2’), which was also the same as 2011 results.

Question 2: How did you get to Central Otago?

Where from	Aircraft via Dunedin / Queenstown	Private Motor vehicle	Bus	Hire car / motor home	Coach tour	Aircraft via ChCh	Bicycle or motor bike	Other	N/A - live here	Total
Domestic	210	121	16	5	0	24	10	1	5	392
Upper NI	136	11		3		24				174
Canterbury	2	55	6				5			68
Otago		25	1						5	31
Lower NI	66	8	6	2						82
Local							2			2
Southland		2	3							5
Upper SI	6	20					3	1		30
International	81	45	50	27	31	3	12	4	0	253
Europe	7	12	3	8	21		7	2		60
Australia	65	6	13	8	2	2				96
UK	2	4	1	5			2			14
USA	2	1	2	5	1	1		2		14
Canada	1	2			7		2			12
South Africa	4	20		1						25
Middle East										0
Asia							1			1
Other			31							31
Total	291	166	66	32	31	27	22	5	5	645

The table above presents the total number of people represented in the survey who commented on their mode of transport into the area.

- The majority of domestic and international visitors arrived in Central Otago via aircraft from Dunedin and or Queenstown.
- The majority of users travelling to the region by aircraft, via Dunedin/Queenstown, used Queenstown airport (157 domestic, 73 international). This compares to 20 users who reported using Dunedin airport (12 domestic, 8 international) and 41 users who did not stipulate which of the two airports they used (all were domestic respondents).
- The category 'Aircraft via CHCH' included 13 domestic and one international user who noted commented that they flew to Christchurch airport and then hired a vehicle to travel to Central Otago.
- No domestic visitors cited 'coach tour' as a means of getting to Central Otago⁴.
- The category 'Other' included Taieri Gorge Train (3) and Hitchhiked (2). Interestingly, Taieri Gorge Railway was the most cited activity visitors to the area were planning to do (75 references – refer to question 12 below).

⁴ It is assumed that 'coach tour' refers to organised tours, and 'bus' refers to timetabled bus routes within the South Island.

Question 3. What sort of accommodation are you planning to stay in?

Type of accommodation	Central Otago		Total	Queenstown / Wanaka		Total
	Domestic	International		Domestic	International	
Homestay or B&B	201	97	298	1	2	3
Boutique Lodge	109	103	212	1	2	3
Motel	103	57	160	3	2	5
Hotel	129	19	148	3	2	5
Holiday Park	47	23	70		2	2
Motor home/freedom camping	18	8	26		1	1
Backpackers	19	5	24		1	1
Holiday Home	17		17	2		2
Stay with friends	12		12	1		1
Other	3	5	8			0
N/A - live here	2		2	1		1
Total	660	317	977	12	12	24

The table above is the total number of times various types of accommodation were cited. Generally people cited a mix of accommodation types.

- 97% of responses related to accommodation based within Central Otago.
- Homestay/B&B were the most popular types of accommodation overall, followed by Boutique Lodge, then Motel and Hotel.
- 63% of responses from international visitors related to staying at a B&B, homestay or boutique lodge. Proportionately, International visitors mentioned boutique lodges twice as often as domestic users.
- Motels and Hotels were the most cited types of accommodation in Queenstown and Wanaka.

b) Learning about the Otago Central Rail Trail

Question 4: How did you first learn about the rail trail?

How first learned?	Domestic	International	Total
Word of mouth	282	55	337
Organised tour	2	54	56
Internet	20	36	56
Media / TV	32	5	37
Always known about it	29	1	30
Travel guide book		15	15
Aware of it on previous trip		11	11
Magazine		5	5
Advertising	5		5
Brochure		1	1
Total	370	183	553

The table above shows the total number of times an information source was cited.

- 61% of people cited word of mouth as how they first learned about the rail trail. This compares with 57% in the 2011 survey. Word of mouth was also the main way people learned about the rail trail in 2011 and 2008.
- Word-of-mouth comprised 76% of domestic responses, and 30% of international responses – this compares to 61% domestic and 48% international responses in the 2011 survey.
- Organised tours were cited by international visitors as their next most common means of learning about the trail.
- The internet was mentioned by both domestic and international users as another common way of learning about the trail.

Question 5: Where have you gone to find out information about the rail trail?

Info source	Domestic	International	Total
Website/social media	338	117	455
Word of Mouth	34	17	51
Package operator	9	32	41
i-SITE/Visitor Centre	5	8	13
Brochures			0
Guide Book		4	4
Other ⁵		21	21
Total	386	199	585

The table above is the total number of times an information source was cited.

- 78% of visitors (88% of domestic visitors) use social media and websites to find out more information about the rail trail. This is compared to 58% in the 2011 survey, and 33% in the 2008 survey..

c) *Extent of Use*

Questions 6, 7 & 8: How many times have you visited or ridden the rail trail?⁶
Are you completing the whole trail or just a section?
If just (a) section(s), which one(s)?

The table below displays the number of times the person being surveyed had visited or ridden on the rail trail, and whether they were riding all or a section of the trail.

- The majority (86%) of responses reported visiting the rail trail for the first time. This is similar to the 2011 survey (88% were visiting for the first time), and the 2008 survey (79% were visiting for the first time).
- 20% of responses were cycling only part of the trail – this compares to 18% in 2011 and 8% in the 2008.

⁵ Respondents who cited 'Other' did not specify detail as to where they went to find out information.

⁶ It should be noted that other areas of the Rail Trail, particularly near towns or adjacent to the tunnels and viaducts, are more likely to attract 'partial' trail users, compared to the survey point at Wedderburn.

Number of times	Survey 1	Survey 2	Survey 3	Total
Part	17	20	7	44
1 st	46	80	64	190
2	7	6	5	18
3		3		3
4 to 5	1	1		2
5 +		1		1
10+	3		2	5
Whole	39	72	65	176
Total	56	92	72	220

Those users who were riding only part of the trail reported using a range of rail trail sections. The most commonly reported section, across all survey periods, was Lauder to Wedderburn.

Section	Survey 1	Survey 2	Survey 3	Total
Clyde to Hyde	2		1	3
Clyde to Wedderburn		2		2
Clyde to Ranfurly	1	2		3
Alexandra to Ranfurly			1	1
Omakau to Hyde	2			2
Omakau to Middlemarch		1		1
Lauder to Wedderburn	5	7		12
Lauder to ?		1		1
Raggety to Oturehua	1			1
Oturehua to Waipiata		1		1
Oturehua to Wedderburn		2	1	3
Wedderburn to Hyde			1	1
Wedderburn to Oturehua	1			1
Wedderburn to Auripo		1		1
Wedderburn to Lauder	1			1
Wedderburn to Omakau			1	1
Wedderburn to Idaburn	1			1
Wedderburn to Alexandra to Middlemarch	1			1
Ranfurly to Waipiata to Auripo Road	1			1
Ranfurly to Ida Dam back to Middlemarch		1		1
Ranfurly to Clyde	1			1
Ranfurly to Alexandra	1			1
Hyde to Poolburn		1		1
Just do enjoyable sections, avoid long stretches			1	1
Two thirds			1	1
Total	18	19	7	44

d) Time of Year

Question 9: Why are you doing the trail at this time of year?

Why	Survey 1	Survey 2	Survey 3	Total
Holiday time / on holiday	52	82	116	250
Weather at this time of year	20	103	60	183
Fitted personal circumstances	36	23	50	109
Part of a group	32		9	41
Avoiding the rush	13	9	6	28
Availability of accommodation			4	4
Advice from others	2			2
No reason	2			2
Total	157	217	245	619

The table above presents the total number of times various reasons were cited.

- Overall, the main reason cited for choosing to cycle the rail trail at that particular time of year, was holiday time followed by weather. Comments relating to “weather” included international visitors stating that they were escaping winter weather at home.
- Holiday time was the main motivating factor for respondents surveyed in autumn, and spring, whereas the weather was the main motivating factor for summer respondents. Consistent with these results, the spring and summer surveys were carried out outside of the main school holidays, and the autumn survey was carried out during main school holiday time.
- Spring riders are motivated by a more generic mix of circumstances – including holiday time, personal circumstances, being part of a group, and avoiding the rush.

In the 2011 survey spring riders were motivated by personal circumstances and holiday time; holidays were much more important in summer, and the weather and season were major motivators in autumn.

e) Time in the District and on the Trail

Question 10: How many days are you spending on the rail trail?

Days on Trail	Survey 1	Survey 2	Survey 3	Total
Part	17	20	7	44
0		1		1
0.5	3			3
1	6	10	4	20
2	5	6	1	12
3	2			2
4		2	1	3
5	1		1	2
6		1		1
Whole	39	71	65	175
1		1		1
2	3		1	4
2.5		1		1
3	14	16	22	52
3.5		3		3
4	14	37	23	74
5	7	10	16	33
6	1	2	3	6
7		1		1
Total	56	91	72	219
Average				
<i>Part</i>	<i>1.7</i>	<i>1.8</i>	<i>2.1</i>	<i>1.8</i>
<i>Whole</i>	<i>3.7</i>	<i>3.9</i>	<i>4.0</i>	<i>3.9</i>
Total	3.1	3.5	3.8	3.5

The table above presents the total number of survey counts that answered this question.

- The average number of days on the trail (3.5) is the same as the 2011 survey.
- Visitors seem to spend a longer length of time on the trail in autumn than spring or summer. A similar pattern was observed in the 2011 survey.

Question 11: How many nights is your total visit to Central Otago?

Nights in CO	Survey 1	Survey 2	Survey 3	Total
Part	15	19	6	40
0		2		2
1	2		2	4
2	8	12		20
3	2	3		5
4	1	1	1	3
5+	2	1	2	5
10+			1	1
Whole	39	71	65	175
1		1		1
2	8	14	7	29
3	11	27	13	51
4	8	18	11	37
5+	10	11	27	48
10+	1	1	6	8
28 ⁷			1	1
Total	54	90	71	215
Average				
<i>Part</i>	2.5	2.2	4.3	2.7
<i>Whole</i>	3.6	3.5	4.9	4.0
Total	3.3	3.2	4.9	3.8

The table above presents the total number of survey counts that answered this question. The average number of nights in Central Otago (3.8) has increased very slightly from 2011 (3.6), and is the same as the 2008 survey (3.8).

Nights in CO	Age <16	Age 16-30	Age 30-50	Age 50+
0		1		2
1	2	33		6
2	22	41	37	25
3	8	28	45	83
4	8	10	42	51
5	11	12	29	30
6	7	8	25	21
7		1	10	10
8				4
9	2		2	
10			3	8
11	1	1		1
14	2		3	4
28				6
Total people	63	135	196	251
Average	4.1	2.7	4.2	4.8

⁷ This response related to one group of 6 people from the upper North Island, all 50+ years of age.

The table above presents the number of nights spent in Central Otago, broken down by the age range represented in the survey responses.

- Consistent with previous surveys, the 50+ age group spend more nights in Central Otago, on average, than other age groups. The average length of stay for the 50+ years age group has increased slightly from 2008 (4.5 nights) and 2011 (4.1 nights) to 4.8 nights in 2015.
- The average length of stay for the <16 years and 30-50 years age groups has also increased: <16 years has lifted from 2.5 nights (2011) to 4.1 nights (2015); and 30-50 years has lifted from 3.4 (2008) and 2.5 (2011), to 4.2 in 2015.

f) Other Activities undertaken

Question 12: If you are a new visitor, what activities have you or will you do during your stay in Central Otago?

Activities	303
Taieri Gorge Railway	75
Curling	65
Heritage sites	45
Visit Wineries	20
Walking	18
Sightseeing tours	12
Visiting friends and relatives	12
Mountain biking	11
Other (specify)	10
Clutha Gold Cycle Trail	10
Old Cromwell Town	10
Roxburgh Gorge Cycle Trail	9
Central Otago Arts Trail	3
Fishing	2
Golf	1
Sailing or other water sports	
Highlands Motorsport Park	
Other	22
Hayes Engineering	4
Pubs	4
Visit Ophir	2
Events (Vincent Bike Rally, Ukelele Festival)	2
4WD Tour	1
NIWA office	1
Painting	1
Clyde Dam	1
Clyde to Alex track	1
Fruit buying	1
Hire car to look around	1
Horseriding	1
Millenium Track	1
Jetboating	1

This table shows the total number of times an activity was cited. Some responses included multiple activities.

- In 2011 the top 5 activities were (in order): Taieri Gorge Railway; Curling; Gold mining tours; sightseeing tours and Old Crowell Town. In 2008 the top 5 activities were: Gold Mining Towns; Curling; Taieri Gorge Railway; Sightseeing; and Visiting Wineries. Similar trends are observed in the 2015 responses.

g) Matching expectations

Question 13: How well has the rail trail experience matched your expectation? (1 = not at all, 10 = totally exceeded)

Expectation rate	Survey 1	Survey 2	Survey 3	Total
4		1		1
5	2	1		3
6	3	1		4
7	4	9	3	16
8	19	24	15	58
9	11	21	6	38
10	16	30	38	84
Total	55	87	62	204
Average	8.5	8.7	9.3	8.8

The table above presents the total survey responses.

- Overall, survey responses rated the match between their rail trail experience and their expectations, at 8.8 out of a possible 10. This compares to 9.0 in 2011 and 8.8 in 2008.
- Visitors in autumn rated their experience versus expectation slightly higher than respondents visiting in the spring and summer, though the difference between the three was not statistically significant. This pattern between surveys was also observed in the 2011 survey.
- Reasons as to how experience matched expectations are attached as Appendix 1.

h) Rating the Trail experience

Question 14: On a scale of 1 to 10 how would you rate the following (1 = poor, 10 = excellent)

	2014-15		2010	2008
	Count	Rate	Rate	Rate
Overall rail trail experience	212	9.0	8.9	9.0
The riding surface	212	8.0	8.1	7.9
Rail Trail directional signage	207	9.1	8.8	8.7
Accommodation	198	9.1	9.4	9.0
Interpretation panels	197	9.4	9.7	9.7
Toilets	184	9.2	8.7	8.9
Eating establishments	184	9.0	9.2	8.5
Package operator	144	9.5	9.3	9.0
Access to drinking water	125	7.8	8.2	5.6
Visitor Information Centres	60	9.4	9.5	9.4

The table above presents the number of survey responses that rated an item or issue, and the average rating given by those survey counts.

- The overall rating for respondents' rail trail experience was 9.0 out of a possible 10. This rating is comparable to the previous two surveys, indicating that the Otago Central Rail Trail continues to be a very popular experience across all components.
- While most scores across services were similar with previous surveys, ratings for package operators have consistently improved across surveys. Toilet facilities and directional signage also received higher ratings in the 2015 survey.
- Access to drinking water and interpretation panels were both rated slightly lower, on average, in the in the 2015 survey .
- Comments relating to the ratings are attached as Appendix 2.

i) Opportunities to improve the experience

Question 15: Are there any facilities or activities that you think are missing and would improve your experience if they were available?

- A spa!!
- All good, natural
- Amazing snow
- App available
- Backpackers for people on a budget
- Better phone coverage for emergencies
- Better signage to wineries
- Better signage saying where next water is
- Came to cycle but could always be more stuff to do
- Campers - didn't see passports available
- Coffee cart between Lauder & Oturohanga. Emergency gear. Personal Drivers
- Coffee shop every hour
- Compressed Air supplied - as in Arrowtown
- Covered picnic spots to cook in
- Distance signs for water and food. Maps showing accommodation like wine map

- Phone App.
- Don't change it
- Enjoying it
- Fine. Want a little challenge
- Ghost train, tractors
- Gluten free at pubs
- Good, doesn't need more
- GPS based app - self guided
- Great the way it is
- Horseback and electric bike
- Hot tub at end of day
- Huts and signs excellent
- Ice creams
- Kilometres are good
- Lauder - Oturehua big gap, would like a pit stop in this area
- Leave as is
- Like it as it is
- Like road coming up signs
- Link tracks
- Living trails - history, mining equipment. More info panels, Merino Sheep
- Local events advertised on Notice Board
- Massage
- Mobile coffee machines
- More activities for children, sheep petting?
- More compacted track
- More donger sheds for shelter. Take willows out of river bed (weeds in Aussie)
- More drinking water
- More facilities needed for tent campers eg Doc camps with low charges
- More Freedom Camping Sites
- More info on Sheep Farming along the way
- More lunch/snack shops
- More places for water
- More rest areas with seating
- More retailers accepting credit cards
- More shelters
- More signage to places of interest
- More tea shops
- Mystery tour/spot the?
- Need something to stop for between Lauder & Oturehua
- No light bedding at accommodation
- No Wifi
- Nothing - shade
- Poolburn Dam not signposted
- Pretty good. More drinking water easily accessible
- Pretty happy, just more access to water and smoother riding surface
- Room for more hands - on activities (farming?)
- Seats with shelters (heat and sun can be an issue)
- Side track to see falcons
- Signage for wineries
- Signage to accommodation. Map with directory
- Signage to toilets. ATM (left wallet behind)
- Signs to swimming spots
- Swimming opportunities advertised but not there. More picnic tables

- They thought they could have completed it in less time - days finished too early. 3 days ample
- Think it's pretty great
- Thoroughly enjoying it
- Trail Surface
- Tunnel lighting
- Warm toilet seats
- Water points along the trail
- Water signage and no water available. Outside cafes. Tunnel dark - need lights
- Water signage. More sizeable to be seen
- Water, Emergency facilities, tyre repairs
- Weather
- Would be nice to see more towns celebrating their history. Why is everything closed on a Monday?

Question 16: Currently electric bikes (also known as e-bikes) are not allowed to be used on the Otago Central Rail Trail. Do you think they should be?

Count	Yes	No
192	128	64
	67%	33%

The majority, 67% of respondents, thought electric bikes should be allowed to be used. Comments relating to electric bikes are tabulated below:

Number	Responses
24	Only for less able or elderly people
15	It would increase access to the rail trail to more users
10	restriction on speed & / or noise
3	No motorbikes
2	Already using them
1	With a medical certificate
1	Trial basis
1	As long as surface isn't affected

j) Expenditure

Question 13: What is your best estimate of what your expenditure will be for your total rail trail ride (including accommodation and food at both ends)?⁸

Respondents were asked to report on estimated expenditure, while in Central Otago, for their immediate group. The total population represented in the expenditure questions is 621 people. This population size is smaller than the total people represented in the front section of this analysis (662). This may have been caused by a number of factors – for example, two couples could be riding together as a group of four but spend was only cited for one couple; or alternatively, a respondent may live locally and chose not to answer the expenditure questions as they did not deem themselves as spending anything on their rail trail experience specifically.

It should be noted that the spend data reported in this analysis relates to those respondents who reported expenditure through the survey process and does not necessarily reflect *all* users. This needs to be taken into consideration when comparing spend data with the 2010/11 survey, as the population represented in the spend data on that survey was actually larger than the total number of respondents represented in the body of the survey (710 represented in the spend data compared to 648 survey respondents). This will have an impact on the per person spends reported.

Category	Completing part of trail	Completing whole trail	Total
The number of people who reported on their group's expenditure	99	522	621
Package expenses?	\$33,055	\$236,116	\$269,171
Accommodation?	\$2,360	\$19,648	\$22,008
Food and beverages?	\$4,747	\$60,885	\$65,632
Retail shopping?	\$975	\$3,611	\$4,586
Entertainment?	\$130	\$4,310	\$4,440
Drop off/transfers?	\$90	\$1,838	\$1,928
Baggage transfers?		\$729	\$729
Bike hire?	\$200	\$4,230	\$4,430
Other?	\$2,600	\$6,125	\$8,725
Total	\$44,157	\$337,492	\$381,649
Per person (TOTAL REPRESENTED BY SURVEY)	\$446.03	\$646.54	\$614.57
Per person per day	\$247	\$166	\$177

The table above presents the total number of people represented by survey responses citing estimated expenditure, and who also cited whether they were completing all or part of the trail.

⁸ Respondents were asked for their expenditure to and from Central Otago. This is not reported here.

- There was a 5.5% increase in per person expenditure from 2011 (\$582.79) and a 30% increase from the 2008 survey (472.61)⁹. Per person per day expenditure increased by 9.3% from the 2011 survey (\$161.89).
- The largest expenditure is on package expenses, this is the same as 2011 and 2008 surveys.

	Number of people	\$ per person	Average number of days on RT	\$ per person per day
Travelling from Middlemarch direction				
Completing part of the trail	26	\$122.58	1.6	\$78.00
Completing the whole trail	51	\$525.92	3.2	\$164.12
Total	77	\$382.61	2.6	\$148.91
Travelling from Clyde direction				
Completing part of the trail	89	\$432.25	1.8	\$239.66
Completing the whole trail	419	\$665.96	4.0	\$167.10
Total	508	\$625.01	3.6	\$172.89

The table above presents the total number of people represented by cited estimated expenditure, who also noted their direction of travel and number of days on the trail.

- As in 2011, visitors travelling from Clyde direction spend more time on the trail and spend more money per day than those travelling from Middlemarch direction.

Estimated expenditure broken down by age group is difficult to analyse, given the very small sample of survey counts that estimate expenditure for a specific age group. However observations are that the older age groups have higher estimated expenditure per person than younger groups. This was the same in the 2011 survey.

Economic Impact.

The table below is the derived economic impact of the Otago Central Rail Trail on the Central Otago / Otago economy.

Impact Summary	Direct	Total
Output	\$6,906,855	\$10,398,110
GDP	\$3,553,253	\$5,270,786
Employment (FTE's)	81.0	102.4

The direct impacts are measured by the survey sample responses and multiplied by the population of annual rail trail users.

Total impacts include derived (upstream and downstream) benefits, calculated by using multipliers from regional input output tables. Total impacts include derived (upstream and downstream) benefits and are calculated by using the same default multipliers from regional input output tables as used in the 2011 survey.

⁹ Expenditure figures have not been CPI-adjusted.

The 2011 rail trail survey reported a total output of \$12.3 million, GDP of \$6.2 million and FTE of 121.3; and the 2008 survey reported a total output of \$7.2 million GDP of 3.6million, and FTE of 75. Comparing expenditure across the three surveys, the 2014/15 data represents a 15-16% decrease in expenditure, GDP and FTEs compared to 2011, but a 44% increase in output, 49% increase in GDP, and a 37% increase in FTEs compared to the 2008 survey.

These fluctuations across surveys are driven predominantly by the total number of people reported to be using the rail trail over the twelve-month survey period. Track counter data from 2014 was 20% less than in 2011, but 12% more than in 2008.

In contrast, per person expenditure has increased consistently over time (refer to page 26).

The sector break down of this is shown here:¹⁰

	Output	Total Output	GDP	Total GDP	Direct FTE	Total FTE
Accommodation	\$2,833,939	\$4,222,569	\$1,558,666	\$2,260,066	41.1	48.9
Food & Consumables	\$1,187,770	\$1,781,655	\$522,619	\$757,797	17.1	20.5
Retail	\$240,886	\$366,146	\$127,669	\$195,334	3.4	4.1
Road Passenger Transport	\$535,215	\$888,457	\$208,734	\$359,022	6.7	9.2
Vehicle & Equipment Hire	\$1,054,432	\$1,455,116	\$601,026	\$817,396	4.2	6.8
Business Admin & Mgt Services	\$974,260	\$1,558,817	\$487,130	\$808,636	7.5	11.6
Entertainment	\$80,353	\$125,350	\$47,408	\$72,534	0.9	1.2
Total	\$6,906,855	\$10,398,110	\$3,553,253	\$5,270,786	81.0	102.4

- Accommodation derives 41-48% of the benefit, followed by food and consumables.
- As in 2011, the impact of entertainment spend within the region is relatively minor.

k) Final Thoughts

Question 19: Do you have any other comments or thoughts?

- All good
- Just Great
- Haven't seen many families using the trail
- Enjoying it
- More trees and shelter
- Love It
- Beautiful track, friendly people along the way
- Great except signage from Anniversary Track to Alexandra
- Enjoying it
- Hope it endures. People love it and come back

¹⁰ The same calculation methodologies as the 2011 survey were used in these calculations. Expenditure on packaged tours has been split between accommodation (50%), administration (20%), equipment hire (20%), and transport (10%); Retail includes shopping and other; and road passenger transport includes drops/transfers and baggage transfers.

- Just love it.
- Options (accommodation) available are great.
- Signage for passport stamps. Local beer on tap
- Great places to stop for morning and afternoon teas
- Really enjoyable
- More info on wifi coverage
- Very good experience
- Like all trails in NZ. Have cycled from Keri Keri in 2 months.
- Good info and services. A well-appointed trail
- Nice Cup of Tea
- Been lovely, enjoyed it. Need a NZ Bike book as an "app"
- Great experience. Father & son planning to do it again.
- Good Coffee, Good Maps
- Stop the wind. No rubbish on the trail which is Great! Loved the offer of coffee & muesli bar
- Survey too long
- Safety Great!
- Great co-ordination with the transfers etc and good how the businesses help each other out
- Best of its kind
- Fantastic, love it
- Great experience, a challenge. Not getting value for money with the food
- Pretty good
- More advertising of the trail. No info available in Nelson initially.
- It's great
- Thanks for the break. Tunnels are fun. More downhill
- Enjoying it
- No litter
- Great facility would recommend it.
- Loving the history aspect of it
- Think its great and not crowded
- Lucky with the weather
- Passport half-baked. If reprinted, maps should show coffee stops
- Enjoyed and will recommend to others in Auckland. Love scenery and local pubs, meeting the locals
- Beautiful country
- Treasure hunt/spot the sign for younger riders. Love NZ, great place will recommend Rail Trail to others
- Great experience, enjoying it immensely
- Restaurants overpriced
- Out of date info in package itinerary.ie. Meal not served at accommodation as advertised and no pet sheep
- Biker didn't have time to talk, only asked main questions
- Too remote - didn't expect this
- Great idea, don't change too much
- Cool
- Lovely countryside and tunnels. More light in tunnels
- Bridges need resurfacing
- Some sections are rough
- Pretty - lovely
- Perfect
- Irrelevant question, property owners here
- It's good to see you doing a survey of trail users
- Good fun, keeping fit while seeing the scenery

- More freedom camping. Fruit trees are great, should be more
- More water available
- More seats on side of trail, signage for next water stop. Best meal at Post Office in Clyde
- Great experience - a part of NZ
- Surpass's anything that they have in England.
- Really happy - Loves Nzer's way of welcoming tourist thru i-sites.
- Signage.
- Taieri Gorge Train is great. Start or finish more co-operation together for marketing. Doing study on operators/accommodation suppliers so have done trail 3 times.
- More info on wildlife and birdlife.
- Leave as it is.
- Loving it.
- Great experience - beautiful countryside.
- Nice way to see Central Otago.
- Like it the way it is.
- Great track. Definitely recommend to others.
- Loving it - Don't change anything.
- Great.
- Thank you to everyone who contributes to this. We will be back.
- Think it's great, we will be back again.
- Fruit trees along trail would be good. Likes self-contained cottages in Wedderburn.
- Just love it.
- Tourists love it.
- Have for 3 months x 5 years.
- Superb
- Good Gear - Bike it now.
- Would like grand kids to do it.
- Happy.
- Co-ordinate wine tourism with bike trail because of demographic. More info for self-planning riders so not so dependent on packages.
- Huts need cleaning. Surface needs upgrade from Ida.
- Will be back.
- ATM's not available.
- Liked having our interview as great to have a person to give feedback to. Two ladies had a tandem as the pillion passenger was disabled from a stroke.
- Fantastic. Recommend to friends.
- No one at XXXXX for wine tasting.
- Nice experience - great scenery.
- Enjoyed meeting people along the trail. Hosts have given great information.
- People excellent in accommodation and cafes.
- Recommended.
- Will recommend others to come.
- Historic lecture Dunstan House. Excellent. Like region.
- Kokonga needs repairing. Passport stops good. Likes info panels.
- Didn't want to stop - too cold
- Great Trail, great trip, great experience
- Ukelele Festival was fun. Great to be offered a cuppa and survey
- Declined to be surveyed
- Guard rails on bridges for children, especially when windy. We like the shelters and the fact that the trail is wide enough to pass groups.
- Beyond expectations.
- Just wonderful - active holiday.
- Quite happy. Great scenery.

- Sharp edges on access to bridges. Notice weeds encroaching. Great.
- Signs to swimming holes.
- Good time.
- Friendly, excellent enjoyable scenic, liked snow.
- Good.
- Great experience! Friendly people.
- More car shuttles. Lovely and great for economy. Struggled with website. Simplify transportation and timetables.
- What is the marketing strategy for more Europeans need targeting.
- Operator contribute to Trail Trust.
- Enjoy weather. Beautiful.
- Motel have brochure A5 simple line map for distance and toilets, etc.
- i-Site Dunedin
- I-Sites best in the world. Lovely. Need water.
- Surprised by country side. More info on Trip Advisor
- More live music at night, local talent, buskers
- Awesome
- Really good
- Just a great experience
- No complaints, fantastic. Make sure people are told they need to be fit
- Love it
- Very pleased
- Wonderful facility - Snow was great
- Fantastic
- Transfers quite pricey. Comments on Trip advisor, Passports. Weather reports, more hot tubs
- Fun, Great holiday, liked the snow
- Well maintained
- Plenty of info - most kiwis
- Fantastic
- Massage/spa? Boutique breweries to advertise in parallel with wineries to make more money out of tourists
- Loved the tunnels
- Friendly helpful people, fantastic
- Taxi from Airport to Queenstown was expensive
- Trail Journeys great. Lauder B & B Fantastic
- Fantastic
- More advertising of Taieri Gorge. Info on the cost of meals along the trail
- Can be alone if you wanted to be
- Been great. Snow, rain, frosts
- Really beautiful. - Snow an added extra
- Very good experience, sore bottom though
- Disconnected Train - Rental Car in Dunedin. Train gets in 1 hour after Rental Car Co closes so had to go out to the airport to collect car.
- Food along RT great
- Good as is
- Train from Middlemarch everyday. Signage at Wedderburn toilets is misleading. Didn't like having to ride further at Middlemarch to get the last Passport Stamp. Better signage from Clyde to start of trail.
- Don't over commercialise
- Loving it, keep it going
- Enjoying it, people great
- Fantastic. Clyde area need signage looking at, a bit confusing
- Keep numbers down

- More Otago wines at accommodation. They had run out of C.O. wine
- Very poor bikes have ruined it a bit for them. Not suitable for a 2 day ride
- Enjoyable. Clutha Gold Trail is better
- Like our coffee break. Doesn't need to be improved
- Just stunning
- Enjoyed it
- Found it quite challenging
- As is - Great
- Happy to see the sun today
- Bike trails are great facilities for Central Otago
- Limited accommodation at certain places esp Hyde during off-peak times
- Cycle Surgery Bikes excellent. Scenery Fantastic
- More huts for weather
- Ophir not well signposted
- Happy the way it is
- Fantastic asset for C Otago. Looking forward to the Clyde Underpass
- Scenery amazing
- Thank you Brilliant
- Cromwell to Alex Please!! More "Share the Road" signs
- Braille signage - Not everywhere but the highest point and prominent areas of interest

Appendix 1: *How well the Rail Trail met expectations (Question 13)*

Rate / Why?

10
Totally loving it but not fit enough Well maintained. Good Info. Not far between coffee. Accessible for everyone Perfect Weather made it Great trail for older people and for easy riding
9
Feel it has deteriorated a bit Amazing, natural, easy Made for rail but utilized for this Weather has been OK this time
8
Totally as expected Weather Mixed riding surface - good and bad Need more water stops Enjoyed the gorge but too many flat straights Not too challenging. Interesting scenery Hotel room too hot Gravel too coarse/ surface rough Rocky
7
Rough Surface, Hard to pedal in some places. Great scenery & interesting signage Scenery, no houses, natural
6
Didn't know what to expect
5
Was what expected Harder than I thought it would be, surface is rougher than expected
4
Less gravel, more compact surface

Appendix 2: Aspects of the experience (Question 14).

What would it take to make it a 10?

1. Overall rail trail experience

10

Rated 11, tell everyone

Better than thought

Great

A highlight of world tour

Despite the rain

9

Few more nice rest areas

Less flat bits

Surface challenging

Picnic spots, swimming holes

Finer gravel

Improve the gravel

Very Good

No hills, perfect weather

Surface improvements in places.

Some of signs not there. Map for kilometres.

doesn't do 10's

Better Track

Hills

Make surface better

8

More info about Stations along the way

More food options and coffee on the trail - in the old railway station?

Water needed

Surface too loose

Smoother surface

Less gravel

More rest areas between Clyde-Alexandra

Surface - better bike seats

Weather

Didn't like Ida Valley straight

Weather, more info about facilities.

Improve surface

more cafes.

River Access would be nice

Bike

7

Wineries open

More consistent surface

Surface

Improve the surface

Overhyped advertising

Better surface
More tunnels, gravel too large
Smoother surface
Better signage, KM posts would be great

6

Rough Terrain

5

Average
Smoother surface

2. Accommodation

10

Best
Beautiful
Above expected
Camping
Good Value

Crow's Nest, Alexandra Budget Hotel 10+.
Great hot showers
Own new vehicle
Similar to last time

9

Facilities for cooked breakfast
Beautiful
Good
Less expensive
Omakau great.
Hot water turned off accidentally at accommodation
More water
Don't like to give a 10
So far

8

More heating
Power Sites cheaper than a tent site
Great would like ensuite
Hot tub
First not brilliant.
More affordable accommodation needed
Too expensive
Better heating needed, cold
Wifi dodgy @ accommodation
Cold

7

Beds not soft enough
More bathrooms
More options, more info
A bit expensive
Not used to cabin
Booked a bit late.

Varied, some 8, some 5
Some basic
Bad shower at one place
Cheaper priced so just a 7

5

Overpriced

3. Eating establishments

10

Pitches

Pubs great

Great Cheese scones at Lauder Café

Perfect for rail trail

Lamb was beautiful

Excellent desert

Oturehua Hotel great meal at Pub.

Friendly.

Beer was 11

Hyde ++

Service, personal touch

Superb, friendly

Simple food, done well

Packed lunches

9

Very large meals at Lauder

More menu options

Generally good

Nutricious meals and plenty of it

Good Service

Beautiful

More expensive than we are use to.

Wedderburn (10) & e-Café (10)

Vegetarian

Gluten Free options

Very well presented

Allergies catered for

8

Pub not open at 10.30

Too much food

nice

Good but no fruit

Revisit costing

More picnic tables

Cheaper meals available?

More budget options

Vegetarians

No gluten free
Service slow
One indifferent experience
Catered food

7

Lighter healthy options would be good
More Vegetarian option
Food a bit pricy but excellent
Expensive where they ate, some meals not so good
Cold meal

6

Not value for money
Not friendly

5

Too Expensive
High prices, BBQ offered last night but very overpriced

4

Simple Fresh Food needed
Oturehua good (9)

2

Rude and not good.

4. Package operator

10

Shebikeshebikes (11 responses)

Trail Journeys organised whole package in 2 days.
Bike it now (3 responses) 1 x outstanding

Cycle Surgery

Trail Journeys (x 8 responses) 1 x Professional
Adventure South

Cycle Surgery (x 3 responses) 1 x excellent trail guide provided

Luxury Rail Trail

Central Rail Planners

Bike hire

9

Bike not good
Mix up between river track and rail trail
Could improve printed itinerary
Itinerary outdated
More free time
Cycle Surgery - great.
Trail Journeys
Pure Trails, Christchurch
Trail Journeys
Bike it Now, excellent on a budget
Speedo on 1 bike not working

Start Point at Clyde had linesman - hard to access R/Trail

8

Handshake too firm:)
Bike it now
Bikes worn and left in snow
Bikes terrible, organisation good
Mix up with bus, only 1 seat

7

Forgot rental!

5. Rail trail signage

10

Great
Very clear
Obvious

more info
No sign for Orchard Garden
Top of the hill more signage
Clyde signage! Better info re Alex Track
Very Good

9

Easy
River trail good sign
Better signage @ Clyde to River Track

One missing after Oturehua
Lots
Bit vague at times
No half way marker.
Missed the sign to Muddy Creek
Missed sign to Ophir
Could be better in Alex
Dodgy in Clyde
Alex a bit confusing
Clyde signage problem
Clyde signage needs improving

8

Ida Valley farmstay not signposted correctly at Wedderburn Shed
Alex to Millenium track confusing. Also Omakau
Distance to Cafes?
Confusing at Omakau
OK
Enough
Markers from place to place
Between Heritage and OCRT.
Couple of places need more
Signs in Alex by the bridge
Clyde needs signage
Signage going back Ophir
Couldn't find it easily in Clyde
Ophir confusing

Getting through Alex & Clyde not straightforward

	7
More needed	
More needed	
Not easy getting from Clyde to the trail	
Alexandra from Millenium Track	
More signage for the Ophir Loop	
More signs. Lauder confusing gates.	
How far to the top of the hill	
Clyde to Alex Track. Sign by the bridge	
	6
The odd gap, could be improved	
Clyde - Alex Millenium Track, poor signage	
More before Lauder	
Next township and no. of KMs to it	
	5
More distance markers	
OK	
Not enough	
Need signs to say next town.	
Ophir not easy to work out how to get there	
	4
Signage to cafes, passport stamps, signs to Oturehua	
	3
More signs	
	1
Couldn't find signs for "Ophir Loop"	
6. Interpretation panels	
	10
Great	
Reading them all and collecting stamps	
Read book	
Love reading them	
	9
Great	
Great	
Large Info sign	
Larger info sign	
Bird poo on benches	
	8
Some repeats	
Repetitive	
More of them	
	7
V Good but a lot of repetition	
Some are a bit busy	
	6
Ida Valley Signs Tatty	
	5
Too much info, need visual only	
7. The riding surface	
	10

Has improved on previous times

Natural

Better than expected

Clyde - Alex Track good also

9

Fine

Better where it's firmer

Rough in places

Smaller metal

Smaller metal but happy.

better than expected.

Rocky & Bumpy

Tunnels

Bit Bumpy

Better than expected

Rough in places, but to be expected

8

A few rough spots

Loose gravel gone

Deteriorating a bit

Good for a railway

But leave as it is

Finer gravel

A bit bumpy

Not used to the loose gravel

Bit rough for kids

Rough in places

wider tyres

rough patches

Could be smoother

Some bad bits - need improvement.

Rough patches and horse poo.

Bit rough in places

Rough in parts

Sometimes

Muddy in places

Rough in parts

Appropriate

A bit hard for first timers

Made smoother

Stones too big in places

Very rocky in places

Tidied up

Rail Trail

7

Rough in places

Gradient Good but gravel too loose in places

Gravel Loose

Rough at times
Mixed
But don't change it
Too boring
Expected better, in places was good
Just OK
Was good before Ranfurly, terrible after
Great prior to Ranfurly
Smoother
Loose.
Changeable
Better surface in Alex
Too bumpy
Bit bumpy bridges too bumpy
Could be a lot better
Expected to be harder
Wedderburn Saddle rough

6

Inconsistent
Mixed
Would be nicer if more compacted
More rough than expected.
Rocks embedded are tricky
Too rough
Good

5

mixed, some good spots, some harder
Finer gravel
Needs improvement
Loose - could be better
a Challenge
Finer gravel
More compacted
Bumpy
Need finer metal
Needs to be smoother
Poor
Gravel smaller
Smoother please, like sand on Alps to Ocean would be much better.
Needs grading more often

4

Needs improvement

2

Tarseal and padded seat

1

Rough
Bad section near Poolburn

8. Access to drinking water

10
No Problem No issue had own water Have own
9
No Problems Not a problem No Problems No problem Operator gave info
8
Could be a problem if hot Easier way of getting water. Taps in towns. A few more Carried own Took own Not well signed
7
Could be more Tap with drinkable water More options needed Not well signed
6
Need more Taps would be good Struggle in 30 degrees. Problem for tent campers
5
Only saw water at Oturehua Need more taps along the way Poor Knew they needed to bring it Not obvious More access Need more access (taps in towns) Up to individuals. Not seen any Better signage, more stations
4
Need more options More signage for water needed. Not good
2
More options needed. Need to plan carefully Didn't find any
1

Have struggled to find water
Need more taps
Need more access to taps
Not seen anywhere
Found none.
There is none. No signs.
Not able to locate, better signage
Poor - needs more

9. Toilets

10

Need more between Alex & Omakau
Plenty
Good number
Toilet paper

9

No Problem
More
Enough
Good toilet

8

Plenty
Good
More
More toilets
more
Signage to toilets
Doc toilets, no paper. More cleaning required
A few more away from the cafes
Paper or signs to advise need it

7

No toilet paper
Enough
More
Adequate
no hand wash
Not enough. Strange places.

6

Better serviced toilets

5

Okayish
Poor
Adequate

Could be more
Some quite dirty

10. Visitor information centres

10

Good

More toilets

Paper or signs to advise need it

Good

More toilets

Paper or signs to advise need it

9

Ranfurly

Lorraine very helpful

Like using them

8

Great

7

No Free Wifi

Not very visible

Better signage



Appendix 3: Survey questionnaire

Interviewer Notes:

Date	Time	Direction	Age Group	Gender
		From Clyde	<16	M:
		From M'march	<16-30	F:
			30-50	
			50+	

Hello,

Can you take a few minutes to fill out a survey on your rail trail experience?

The survey is being undertaken by the Central Otago District Council, with the support of the Department of Conservation and the OCRT Trust. Your views will assist us to enhance future user's experiences.

1. Where are you from? _____

2. How did you get to Central Otago?

Private motorcar		Hire car or motor home	
Bus		Coach tour	
Aircraft via Dunedin or Queenstown		Bicycle or motorbike	
N/A I live here			

3. What sort of accommodation are you planning to stay in?

	Central Otago	Queenstown / Wanaka		Central Otago	Queesntown / Wanaka
Hotel			Motel		
Boutique Lodge			Homestay or B&B		
Holiday Park			Motorhome or freedom camping		
Holiday Home			Stay with friends		
N/A I live here					

4. How did you first learn about the rail trail? _____

5. Where have you gone to find out information about the rail trail?

Website (name)	Package Operator	i-site	Word of Mouth	Other

6. How many times have you visited or ridden the rail trail? _____

7. Are you completing the whole trail or just a section? _____

8. If just (a) section(s), which one(s)? _____

9. Why are you doing the trail at this time of the year? _____

10. How many days are you spending on the rail trail? _____

11. How many nights is your total visit to Central Otago? _____

12. If you are a new visitor, what activities have you or will you do during your stay in Central?

Curling		Old Cromwell Town	
Sightseeing tours		An event (name)	
Taieri Gorge Railway		Historic gold mining towns and reserves (ie, St Bathans)	
Visited Wineries		Visiting friends and relatives	
Other1		Other 2	

13. How well has the rail trail experience matched your expectations? (1 = not at all, 10 = totally exceeded)

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

Why?

14. On a scale of 1 to 10 how would you rate the following (1 = Poor, 10 = Excellent)
(Put a line through it if not applicable or no opinion)

#	Item	Rate	To make it a 10?
1	Overall rail trail experience		
2	Accommodation		
3	Eating establishments		
4	Package operator		
5	Rail trail signage		
6	Interpretation panels		
7	The riding surface		
8	Access to drinking water		
9	Toilets		
10	Visitor Information Centres		

15. Are there any facilities or activities that you think are missing and would improve your experience if they were available?

16. Currently electric bikes (also known as e-bikes or booster bikes) are not allowed to be used on the Otago Central Rail Trail. Do you think that they should be?

We have a few questions about your expenditure while in Central Otago

17. How many people are in your immediate group?

18. What is your best estimate of what your (your groups) expenditure will be for your total rail trail ride (including accommodation and food at both ends)?

#	Category	Expected total
1	All up costs (if with package)	\$
2	Accommodation	\$
3	Food and beverages	\$
4	Retail shopping, including souvenirs	\$
5	Entertainment / activities / attractions	\$
6	Drop off / pick up transfers	\$
7	Baggage transfers	\$
8	Bike or gear hire	\$
9	Getting to and from home to Central Otago	\$
10	Miscellaneous / any other spending	\$

16. Do you have any other comments or thoughts?

Thank you for your input. The survey is for statistical purposes only and your information will not be used in any other way.