



OTAGO CENTRAL RAIL TRAIL



USER SURVEY 2010 / 2011

Central Otago District Council
June 2011

Table of Contents

Background	3
Major Results	4
Overview	7
Data confidence	8
External Data	9
a) Rail Trail usage	9
Observed Data.....	10
a) Daily trail counts.....	10
b) Time of day	10
c) Direction of travel	11
d) Age and gender.....	11
Surveyed Data.....	12
a) Where do people come from?	12
b) Learning about the Otago Central Rail Trail.....	13
c) Extent of Use.....	14
d) Time of Year	15
e) Time in the District and on the Trail.....	16
f) Other Activities undertaken	18
g) Matching expectations.....	19
h) Rating the Trail experience	19
i) Opportunities to improve the experience	20
j) Expenditure	22
k) Economic Impact.....	23
l) Final Thoughts	24
Appendix 1: How well the Rail Trail met expectations (Question 11).....	29
Appendix 2: Aspects of the experience (Question 12).....	32
Appendix 3: Survey questionnaire	48

Background

The survey presented here is a follow up to a survey conducted over the summer of 2008 / 2009. As much as was possible the methodology and questions were the same as the earlier survey, enabling a direct comparison of the earlier survey's results to be undertaken.

This work has been undertaken for a number of reasons:

- To capture the views and opinions of visitors to Central Otago, so that actions (by Council, the community and business interests) can be taken to better meet their needs and expectations;
- To quantify the economic benefits that events and visitors bring to the district; and
- To provide information that will enable more effective promotion of Central Otago to target markets and demographics.

The need for the initial survey was identified through the development of the Central Otago Tourism Strategy (2007). The follow up was planned to enable some trend analysis as well as continuing to document the experience and impact of rail trailers.

This work is also consistent with the destination management approach of Council. The expectations of both visitors and locals need consideration, as does the importance of the wider offerings of the district.

The results presented here are the results of three sub-surveys carried out at different times over the 2010 / 2011 season. These surveys, representing different seasons of the year, were conducted by interview at the Seagull Hill Gangers Hut, near Wedderburn and at the highest point of the Rail Trail.

The surveys were conducted by interview. The same two staff (one casual and one a permanent i-SITE staff member) conducted these.

The total direct cost of this research is estimated to be \$7,000. This comprised staff interview and data entry time, plus vehicle travel and consumables. Data analysis has been complex and is estimated to have taken ten days of non-costed time by Business Development.

Major Results

Many of the significant outcomes of the most recent study are the same or very similar to those from the 2008 / 2009 survey.

1. The estimated economic impact of the Otago Central Rail Trail to the inland Otago economy is estimated as follows:

Impact Summary ¹	Direct	Total
Output	\$8,159,042	\$12,277,024
GDP	\$4,213,793	\$6,245,289
Employment (FTE's)	96.0	121.3

Depending on the measure this is a 61% to 78% increase on the economic and social impact derived from the 2008 / 2009 survey. The main drivers for this increase are:

- Per person expenditure increased by 23% from \$472 to \$582.
 - The annual number of people recorded at Seagull Hill increased by 40% from 10,000 to 14,000 (this includes full and part trail users and is accounted for in this outcome).
2. The largest impacts are in the areas of accommodation, package operators as well as food and consumables. Conversely, entertainment and retail were minor beneficiaries of visitor spend, accounting for only 5% of the impact.
 3. Visitor ratings of their rail trail experience are very similar to the previous survey. While there was only one significant change (water availability²), eight of the nine measures queried showed an increase in rating or were the same as 2008 / 2009. The overall rating of the experience showed a small (insignificant) decrease from 9.0 – 8.9. The comparison of the visitor ratings is shown here:

	2010		2008	Trend
	Count	Rate	Rate	
Overall rail trail experience	198	8.9	9.0	↓
Accommodation	177	9.4	9.0	↑
Eating establishments	173	9.2	8.5	↑
Package operator	108	9.3	9.0	↑
Rail trail signage	196	8.8	8.7	↑
Interpretation panels	183	9.7	9.7	↔
The riding surface	192	8.1	7.9	↑
Access to drinking water	118	8.2	5.6	↑
Toilets	116	8.7	8.9	↓
Visitor Information Centres	57	9.5	9.4	↑

¹ Direct is the immediate (direct) impact of people using the trail while total considers the upstream and downstream impacts. All figures other than direct output are derived from multipliers based on standard input / output tables for Central Otago. Direct output is based on the per person expenditure measured in the survey multiplied by the number of people counted at the point of the survey. Therefore, it is a conservative count as while it should capture all people who do the full trail it does not capture all who only do part.

² This is somewhat hard to explain, as other than a tap at Otarehua, the availability of water is fundamentally unchanged. Many people did, however, state that they were making their own arrangements, so it may be that people are now more aware and are making allowances.

4. As for 2008 / 2009, none of the factors we recorded (where people were from, what direction they were travelling in, their age, how long they were spending or how much of the trail they were doing affected the overall trail experience. Most importantly, this again includes the time of the year. People enjoy their experience as much in spring and summer as they do in autumn.
5. The make up of who is a rail trailer is very similar to the last survey – with one exception, which although not a statistically significant change is still interesting from a trend perspective. As for 2008 / 2009 the “typical” rail trailer is biking, is a person in their 40’s or 50’s from a larger urban area in New Zealand (especially upper North Island) doing the whole trail for the 1st time. The change is that men outnumbered women in the surveys by 54% to 46%, almost the opposite ratio as was observed last time.
6. International visitors tend to be younger, as do rail trailers from Otago, including locals.
7. More mature people spend longer on the trail and spend significantly more money (both in total and per day) than do younger people.
8. As for the last survey, age is the most important determinant of behaviour. Other factors such as expenditure, time on the Rail Trail etc... are generally best explained in terms of the age of the visitor.
9. The proportion of International visitors has stayed constant at about 20%. The greatest numbers of international riders come from Europe and not Australia. Internationals are less seasonally affected than domestic riders who have a strong preference for autumn in Central Otago.
10. West to east (Clyde to Middlemarch) is still the main direction of travel. Interestingly, two-thirds of people who were only doing a section of the trail were travelling in the opposite direction when surveyed.
11. Considering only people doing the full trail, people travelling from the Clyde end spend longer and spend more per day. This is largely an age thing, as Clyde seems to be the main portal for packaged rides, which are favoured by the more mature New Zealander (as opposed to the younger international). This trend was recorded at the first survey, but was not identified at the time analysis was undertaken.
12. Number of days spent on the Rail Trail and nights spent in Central Otago are largely unchanged from two years ago, as are the activities undertaken by visitors. Surveyed people spent an average of 3.6 nights in Central Otago (3.8 in 2008) and 3.5 days (3.7). The Taieri Gorge Railway, curling and visiting gold mining towns were major activities undertaken.
13. Word of mouth remains the main way that people have found out about the Otago Central Rail Trail. This includes international visitors. This is followed by ‘always known’ and travel guide books (almost exclusively international visitors).
14. Once having heard about the rail trail the significantly largest place people went for information was the internet. Word of mouth, package operators and (for internationals) i-SITES and brochures were relatively less important.
15. A question that was only asked for the final component of the 2008 / 2009 survey was asked for all three segments this time. This was “why are you doing the trail at this time of the year?” Spring riders felt that it fitted their personal circumstances or aligned with holidays. Summer was predominantly about holidays while autumn rail trailers were attracted by their expectations on the weather at the time of the year, which was closely related with the attraction of the season. Overall, personal circumstances and alignment with holidays were the main reasons cited.
16. As an observation, there seem to be less negative comments regarding operators than there were two years ago. It would be good to think that this reflects the increasingly professional focus and levels of service of businesses deriving income from rail trail

visitors. However, given that there were a few negative comments there is still room for improvement.

The impact of the rail trail on the Central Otago economy has continued to grow. It was previously estimated to contribute between 0.5% - 1% towards the local economy. This is now between 1% and 2%.

The nature of the person coming to do the rail trail and their experience once here is largely unchanged from two years ago.

While the answers may be complex, there are a number of opportunities identified through this survey. For example, retail and entertainment have largely missed out on capturing the rail trail dollar. How this could be addressed by individual businesses would require some careful consideration.

What is clear, as it was two years ago, is that people's enjoyment is not affected by seasonality. Although usage is starting to spread out, almost 50% of people doing the rail trail do so in March and April. Getting more people to come at different times of the year is certainly one of the main opportunities confronting the administrators and operators on the Trail.

Overview

This survey largely replicates the user survey conducted in 2008 / 2009. Three blocks of surveys were undertaken:

- Survey 1: Early December 2010 “Spring”
- Survey 2: Early February 2011 “Summer”
- Survey 3: Late March, Early April 2011 “Autumn”

Based at the Seagull Hill Gangers Hut, almost exactly half way along the trail and within 500m of the highest point, two survey takers conducted face to face interviews with individuals and groups. These were asked a series of questions about their Rail Trail experience. These questions included:

- Where are you from?
- How did you first hear about the Rail Trail and where did you go for information?
- Why are you doing it now?
- How long are you taking?
- What activities have you done or are planning to do?
- Rate the experience and various aspects of it
- Detail expenditure.

A copy of the survey is appended.

The survey takers also recorded some observational information about the trail users and recorded this separately.

Gross survey results are presented here.

Data confidence

A total of 210 surveys were conducted. These represented the views and opinions of 648 people riding or walking the rail trail during the season of 2010 / 2011.

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

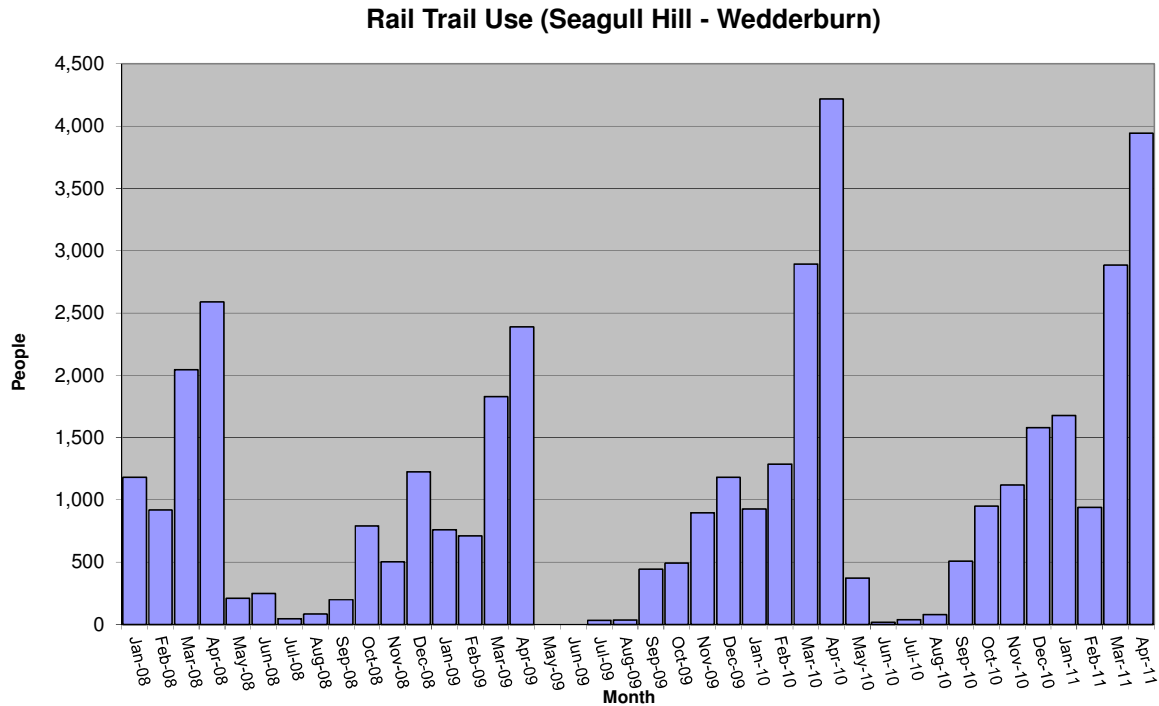
Survey	Spring (Oct - Dec)	Summer (Jan - Feb)	Autumn (Mar - Apr)	Full Year (May 2010 - April 2011)
Total counter Seagull Hill	3646	2617	6826	14100
Sample Survey	178	139	331	648
Period Sample %	4.9%	5.3%	4.8%	4.6%
Confidence Interval (95% confidence level)	7.2%	8.1%	5.2%	3.8%

As an example of what this indicates, when looking at the total sample of all three blocks of survey, there is a $\pm 3.8\%$ margin of error around the outcome. When considering the gender split (54.2% male), we can be 95% confident that males make up between 50.4% and 58.0% of all trail users at Seagull Hill. The previous survey also had a margin of error of $\pm 3.8\%$, meaning that we were 95% confident that males comprised between $47.4\% \pm 3.8\% = [43.6\% \text{ to } 51.2\%]$. As there is an overlap between the two sets of data we cannot say (although it appears to be the case) that there has been a significant change in the gender splits between the two surveys.

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 becomes increasingly large, meaning that it is increasingly difficult to say with certainty that a result is statistically significant. As such the results are presented as they fall. However, results derived only from the main population should be afforded some confidence as $\pm 3.8\%$ represents a relatively small margin of error.

External Data

a) Rail Trail usage. Figures provided by Department of Conservation³



User count for the 2010 calendar year was 13,977. For the 12 months to April 2011 the count was 14,100⁴. An annual estimate is required so that the sample can be related to the total usage for this section.

This does not claim to be the 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.

³ Figures for May and June 2009 are missing, but assumed to be fairly minor.

⁴ There is some question about the Feb 2011 count. DOC has subsequently replaced the counter. However, this is the only information to hand and is used as provided. Note that the gates are generally opened for events, so the Duathlon and RTC100 events would not register as usage (Counters are positioned by Gibson grates).

Observed Data

a) Daily trail counts

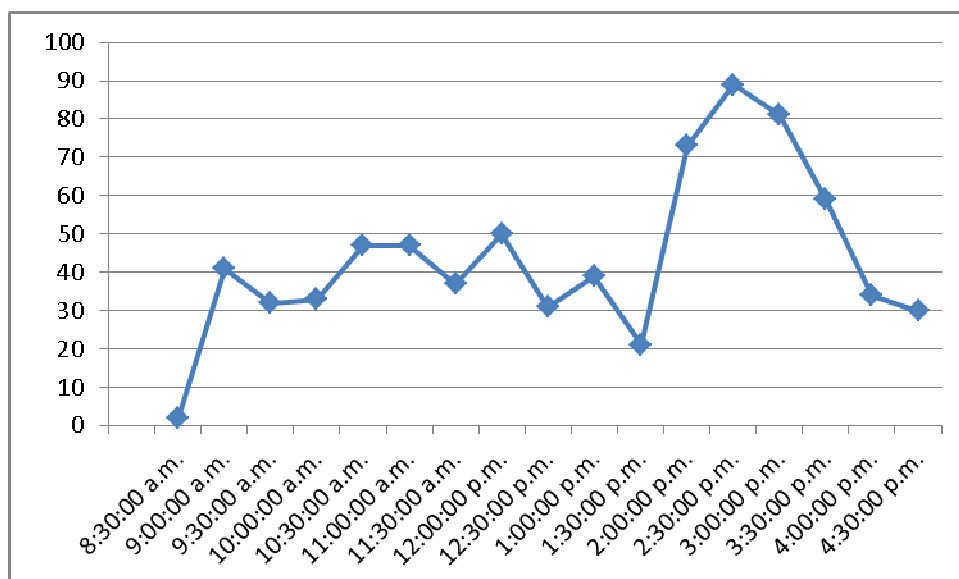
The surveyors maintained a count sheet and recorded all rail trail users by mode of transport, direction and time.

Survey	Date	Bike from Clyde	Bike from Middlemarch	Walk from Clyde	Total
1	1/12/2010	26	44	1	71
	2/12/2010	23	10		33
	3/12/2010	32	1		33
	4/12/2010	17	3		20
	5/12/2010	23	4		27
1 Total		121	62	1	184
2	2/02/2011	24	4		28
	3/02/2011	25	4		29
	4/02/2011	39	9		48
	5/02/2011	28	8		36
	6/02/2011	18	7		25
2 Total		134	32		166
3	30/03/2011	123	14		137
	31/03/2011	33	6		39
	1/04/2011	58	27		85
	2/04/2011	63	35	1	99
	3/04/2011	12	24		36
3 Total		289	106	1	396
Total		544	200	2	746

The highest number of users was observed on March 30 (137) and the least on December 4 (20).

There are relatively few people walking the trail compared to biking.

b) Time of day



Overall, user numbers were consistent through the morning with a peak from 2PM – 3.30PM. It seems likely that this reflects the predominant direction of travel (from Clyde) and the closeness of Wedderburn and Ranfurly as pit stops.

In addition, the survey takers made some observations on the people or groups of people they interviewed. This included direction, age and gender.

c) Direction of travel

Direction from	Survey 1	Survey 2	Survey 3	Total
Clyde	62%	78%	74%	72%
Middlemarch	38%	22%	26%	28%
Total	178	139	331	648

Overall, 72% of rail trailers were travelling from the Clyde end. This compares to the 2008 survey where 75% of people travelled in that direction. As for the last survey, the spring component (Survey 1) had the greatest proportion of people travelling from East to West.

It appears that the split of travel direction has not changed significantly from 2008.

d) Age and gender

Age group	Survey 1	Survey 2	Survey 3	Total
<16	38	4	3	45
16-30	31	38	54	123
30-50	48	46	43	137
50+	61	51	231	343
Total	178	139	331	648

Gender	Survey 1	Survey 2	Survey 3	Total
Male	109	68	174	351
Female	69	71	157	297
Total	178	139	331	648

The age splits are very similar to 2008 and the average age of riders is very similar. Approximately half the trail users are estimated to be over the age of 50. As for the 2008 survey, the 3rd block saw the greatest proportion of mature users.

Interestingly, however, the gender mix is different from 2008. In 2010/11 54.2% of users were male. In 2008 53% were women. There has been a 7% swing in terms of gender split. However, as discussed, this is not a significant swing.

Surveyed Data

a) Where do people come from?

Question 1: Where are you from⁵?

This table is sorted by age group

Where from	<16	16-30	30-50	50+	Total	%
Domestic	23	77	118	287	505	78%
Upper NI		25	39	117	181	
Canterbury		16	28	41	85	
Otago	20	26	11	28	85	
Lower NI		4	18	53	75	
Local	3	2	12	13	30	
Southland		2	6	19	27	
Upper SI		2	4	16	22	
International	22	46	19	56	143	22%
Europe	21	30	3	7	61	
Australia	1	4	6	36	47	
UK		7	5	6	18	
North America		3	3	7	13	
Middle East		2			2	
South Africa			2		2	
Total	45	123	137	343	648	100%

Where from	<16	16-30	30-50	50+	Total
North Island	0%	24%	42%	50%	40%
South Island	51%	39%	45%	34%	38%
International	49%	37%	14%	16%	22%

78% of users are domestic. This compares to an estimated 80% in 2008. There are, however, a number of interesting points:

- The largest single source of people visiting the OCRT is the Upper North Island, followed by Canterbury and Otago (excluding local).
- There main international source is Europe, followed by Australia.
- International riders as a group are younger than the domestic riders, especially those from Europe. As a rough estimate, domestic riders are estimated to be on average 45 years old and international riders 37.
- As can be seen, many of the users from Europe were either school age or in their '20's. This was skewed by a large party of European exchange students riding the trail during the 1st survey.
- Local riders and those from wider Otago also tend to be younger than the domestic norm, averaging around 40 years of age.

⁵ 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 will not have a major impact on the results as the combo choices did not always conflict.

Where from ⁶	Survey 1	Survey 2	Survey 3	Total
Domestic	123	79	303	505
Upper NI	39	30	112	181
Canterbury	32	13	40	85
Otago	31	8	46	85
Lower NI	10	10	55	75
Local	9	4	17	30
Southland		9	18	27
Upper SI	2	5	15	22
International	55	60	28	143
Europe	28	23	10	61
Australia	19	19	9	47
UK	4	11	3	18
North America	4	3	6	13
South Africa		2		2
Middle East		2		2
Total	178	139	331	648

- Whereas domestic users are very much more in evidence in autumn (Survey 3), international visitors were featured more in spring and summer.

b) Learning about the Otago Central Rail Trail

Question 2: How did you first learn about the rail trail?⁷

How first learned?	Domestic	International	Total
Word of Mouth	90	29	119
Always known	34	3	37
Travel Guide Book	1	12	13
Internet	3	7	10
Magazine	6		6
Media	3	2	5
Organised tour	1	3	4
TV Programme	3	1	4
In District for other reason	2	1	3
Article (not specified)	2		2
i-SITE	1	1	2
Newspaper article	2		2
Brochure		1	1
Total	148	60	208

- Word of Mouth is the main means by which people first learn about the rail trail. This includes international visitors. This is followed by 'always known'.
- Excluding those who have always known, travel guide books and the internet are the next.

⁶ Results based on full count of trail users

⁷ Results based on count of surveys

- The top five means are very similar to the 2008 survey, with only magazine articles replacing Newspaper articles at the #5 spot when the two are compared.

Question 3: Where have you gone to find out information about the trail?

Info source	Domestic	International	Total
Website	106	30	136
Word of Mouth	23	6	29
Package Operator	20	4	24
i-Site	5	13	18
Brochures	4	10	14
Guide Book	6	2	8
Maps	1	1	2
DVD	1		1
DoC	1		1
Radio	1		1
Magazines	1		1
Library	1		1
Total	170	66	236

- On-line information was the most common source of information for people once they had decided to find out more.
- For international visitors i-SITES and brochures are relatively important. In 2008 it was speculated that the decision to do the Rail Trail was more ad hoc for the younger international travellers. This would again appear to be a possible explanation.
- For domestic travellers many rely on what they are told by other people or on the information provided by package operators.
- Compared to 2008 word of mouth and brochures have become relatively more important while i-SITES have decreased in importance as a source of information.

c) Extent of Use

Question 4 /5: How many times have you visited or ridden the rail trail?⁸

Are you completing the whole trail or just a section?

# of times	1	2	3	Total
Part	9	8	15	32
1st	5	5	11	21
2		1	1	2
3	1			1
4-5	1			1
5+		2	3	5
10	1			1
20	1			1
Whole	50	53	75	178

⁸ Based on count of surveys

1st	45	49	70	164
2	2	3	3	8
3	1		1	2
4-5	1			1
5+	1	1	1	3
Total	59	61	90	210

- 88% of respondents were on the Rail Trail for the 1st time. This compares to 79% in 2008.
- 85% of people or groups surveyed were doing the entire trail. This compares to 92% in 2008.
- With the exception of someone who identified himself as being from the UK, all the 5+ people were locals or based in the wider Otago region. Most of the more frequent users were doing only a section of the trail.
- While 28% (184 of 648) of the total sample were travelling from Clyde to Middlemarch, 67% of people only doing part of the trail were travelling from the direction of Middlemarch. This is partly reflected in days on the trail and expenditure numbers considered further into this summary.
- To summarise, compared to 2008, there was a greater proportion of 1st time rail trailers, but there was a slight decrease in the number doing the entire trail.

d) Time of Year

Question 6: Why are you doing the trail at this time of the year⁹?

Why	S1	S2	S3	Total
Fitted personal circumstances	17	13	27	57
Holiday Time	18	26	12	56
Weather at this time of year	10	1	39	50
Like this season	4	11	14	29
Family reasons	3	6	7	16
Avoiding the rush	4	6	4	14
Advice from others	2	1		3
Use as training track			2	2
Accommodation available		1		1
Total	58	65	105	228

- This question was only asked for the Autumn survey in 2008.
- The differences in time of year between the three blocks of surveys are quite stark. Spring riders are motivated by personal circumstances (such as “fitted in with work”) and holiday time; holidays are much more important in summer and the weather and season are major motivators in Autumn.
- Interestingly, a number of people at all times of the year chose that particular time to avoid the rush.

⁹ Responses have been aggregated into a number of categories. Some of the assignments are pretty arbitrary, as the boundary between categories (for instance, holiday and personal circumstances, or weather and season) isn't hard and fast

e) Time in the District and on the Trail

Question 7: How many days are you spending on the rail trail?

Days on Trail	S1	S2	S3	Total
Part	9	8	15	32
0	2	2		4
1	2	2	4	8
2	4		6	10
3	1	3	4	8
4		1		1
5			1	1
Whole	50	53	75	178
1	1	1	2	4
2	2	4	1	7
3	14	22	20	56
4	24	17	29	70
5	7	9	19	35
6	1		1	2
7	1		1	2
8			1	1
9			1	1
Total	59	61	90	210

Average

• Part	1.4	1.9	2.2	1.9
• Whole	3.8	3.5	4.1	3.8
• Total	3.5	3.3	3.8	3.5

- The average number of days on the Trail (3.5) is slightly down on 2008, where the average was 3.7. This is not a significant difference.
- Time of season does not appear to be a major consideration, although trail users in summer do seem to be undertaking the trip slightly more quickly.
- Even allowing for the greater proportion of users only doing part of the trail coming from the Middlemarch end, people starting from the Clyde end averaged more days doing the rail trail than did people coming in the other direction (4.0 vs. 3.6 days for whole trail users).

Question 8: How many nights are you spending in Central Otago?

Nights in CO	S1	S2	S3	Total
Part	9	8	15	32
0	3	3	2	8
1	1		3	4
2	2	1	6	9
3		3	3	6
4	2	1	1	4
5	1			1
Whole	50	53	75	178
0			2	2
1	1	1	1	3
2	6	8	11	25
3	14	14	16	44
4	15	17	23	55
5	9	6	14	29
6	3	3	2	8
7	2	4	2	8
8			1	1
9			1	1
10			1	1
14			1	1
Grand Total	59	61	90	210

Average

Part	2.0	1.9	1.9	1.9
Whole	3.8	3.8	4.0	3.9
Combined	3.6	3.6	3.6	3.6

- The average number of nights in Central Otago (3.6) is slightly less than for the 2008 survey (3.8).

Nights in CO	Age <16	Age 16-30	Age 30-50	Age 50+
0	1	2	8	
1		5		2
2	3	17	5	13
3	2	13	19	23
4	2	13	19	34
5		5	6	23
6		1	4	3
7			3	5
8				1
9				1
10				1
14				1
Total	8	56	64	107

Average 2.5 2.9 3.4 4.1

- As for the 2008 survey, the message is that the older the people the longer they stay in Central Otago.

f) Other Activities undertaken

Question 9: What activities have you or will you do during your stay in Central Otago?

160 respondents nominated a total of 352 activities that they did or were going to undertake while in Central Otago. These were aggregated below:

Activities	Count
Taieri Gorge Railway	74
Curling	59
Gold Mining towns	56
Sightseeing tours	49
Old Cromwell Town	36
Wineries	27
Visiting friends and relatives	24
Hayes engineering	13
Mountain Biking Naseby	4
Fishing	3
Golf	2
Swim at Ophir & Alex	1
Clyde dam Tour	1
Golden Progress mine	1
Walking	1
Ophir - high country farm	1
Biking	1
Fruit picking along trail	1
Total	354

- In 2008, the top five activities were (in order):
 1. Gold Mining towns
 2. Curling
 3. Taieri Gorge Railway
 4. Sightseeing
 5. Visiting wineries
- Several respondents named four or five activities they were undertaking while in the district. However, most only named one or two.

g) Matching expectations

Question 10: How well has the rail trail experience matched your expectations (1-10)?

Expectation rate	S1	S2	S3	Total
5	1			1
6		2		2
7	5	3	7	15
8	19	15	17	51
9	17	22	12	51
10	16	17	54	87
Total	58	59	90	207

Average 8.7 8.8 9.3 9.0

- While the respondents for the 3rd survey rated their experience vs. expectation slightly higher than did respondents for the first two, the difference between the three is not statistically significant.
- Expectation was also not significantly affected by direction of travel, where people came from (although not significant, local users gave the trail the highest expectation met rating), number of times on the trail and age of riders.
- This is the same outcome as for 2008, where the average rate by which expectation was met was 8.8.

Question 11: Why?

See appendix 1

h) Rating the Trail experience

Question 12: On a scale of 1 to 10, how would you rate the following:

	2010		2008	Trend
	Count	Rate	Rate	
Overall rail trail experience	198	8.9	9.0	↓
Accommodation	177	9.4	9.0	↑
Eating establishments	173	9.2	8.5	↑

Package operator	108	9.3	9.0	↑
Rail trail signage	196	8.8	8.7	↑
Interpretation panels	183	9.7	9.7	↔
The riding surface	192	8.1	7.9	↑
Access to drinking water	118	8.2	5.6	↑
Toilets	116	8.7	8.9	↓
Visitor Information Centres	57	9.5	9.4	↑

- While most scores are similar to the 2008 survey there is an overall trend of improvement, the increase in the rate of “access to drinking water” is especially interesting. While there is now water available at Oturehua the changes have not been that significant. It is possible that there is increased awareness of this issue. There were many comments regarding people making their own arrangements.
- Overall, the OCRT continues to be a very popular experience, as do the components that contribute towards it.
- Specific comments relating to the rates will be appended.

i) Opportunities to improve the experience

Question 12: Are there any facilities or activities that you think are missing and would improve your experience if they were available?

- A bike 'fix it' service would be good
- More cafes along the way
- Appealing that it is so remote
- Better 'no water' signage between Omakau to Oturehua
- Maybe more historic staff the gold mining probably
- Car parks for Motorhomes which are safe
- Coffee between Lauder and Oturehua, sealed track
- Don't become too commercialised, Better indication at Clyde as where trail starts.
- Drinking water
- Free water, Cold drinks
- Good the way it is
- Hall toilets at Wedderburn closed - signs obvious but no facilities open
- Horse riding options would be good.
- If weather was hotter more taps would be needed
- Information panels at each end of tunnels would be good
- Leave it like it is. It's a little adventure
- Like things off track. More tracks down to the river for a swim on hot days
- Little pools to jump in a lake
- Mark map - kilometres to next town.
- More trees for shade
- More ATM available would be good. Hard to get cash
- More free camping sites
- More ganger sheds needed, if weather bad, not a lot of shelter available
- More on info in every town; may walk tracks.
- More phones to ring family and friends.

- More picnic areas
- More sheds for shade along the way
- More toilets along the way. Toilets could be better sign posted
- More tour operators for afternoon activities - mentioned on website but are not obvious on website
- Need better signage for support driver
- Need more side tracks to interesting places
- Needs more information on surrounding towns
- Maybe more rubbish bins
- No, if you want more you have to be hard up
- Nothing was open in Naseby after 4pm
- Problem with bike, no facility to fix it.
- Pub Bars well placed
- Seats or bench's along the trail, more trees
- Side day trips. I.e. St Bathans.
- Signage on side roads - to places of interest
- Swimming pool
- Tar sealed track!!! More compacted
- Thought more fresh local fruit would be available at this time of year. More choices of cafes in Omakau.
- Water along the trail
- Weather forecast for the exact RT
- Would be good if Ophir would be more promoted, such a lovely place
- Would like hunting, fishing options available along the way
- Would like to have more different things to do

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)?¹⁰

Category	Completing:		
	Part of trail	Whole trail	Total
How Many People?	100	610	710
Package expenses?	\$ 7,290	\$ 267,851	\$ 275,141
Accommodation?	\$ 9,535	\$ 33,330	\$ 42,865
Food and Beverages?	\$ 3,990	\$ 58,234	\$ 62,224
Retail Shopping?	\$ 185	\$ 4,243	\$ 4,428
Entertainment?	\$ 40	\$ 3,439	\$ 3,479
Drop off / transfers?	\$ 522	\$ 4,088	\$ 4,610
Baggage transfers	\$ -	\$ 1,605	\$ 1,605
Bike hire?	\$ 640	\$ 8,125	\$ 8,765
Other?	\$ 5,870	\$ 4,793	\$ 10,663
Total	\$ 28,072	\$ 85,708	\$ 413,780
Per person	\$ 280.72	\$ 632.31	\$ 582.79
Per person per day	\$ 147.75	\$ 162.13	\$ 161.89

- This is a 23% increase in per person expenditure compared to 2008 / 2009 (total expenditure was \$472.61 per person).
- As for 2008 / 2009, the largest component of expenditure is on package expenses. These can cover bookings, accommodation, drop offs, baggage transfers and bike hire.
- Due partly to the large difference in the percentage of people only doing a section of the trail when coming from the Middlemarch end, the total expenditure of people coming from that direction was less. Interestingly, however, even taking this into account, people travelling from the Clyde end take longer and spend more per day than do people travelling from Middlemarch, whether they are completing all or only part of the trail. A partial explanation is that the average age of riders travelling from Middlemarch is also less than the average from the other direction. These people travel faster and spend less. This is shown here:

	Number	\$ per person	Days on RT	\$ per person per day
Travelling from Middlemarch				
Completing part of the Trail	71	\$ 211	1.8	\$ 118
Completing all of the Trail	134	\$ 488	3.6	\$ 136

¹⁰ Respondents were asked for their expenditure to and from Central Otago. This is not reported here.

Total	205	\$ 392	2.9	\$ 135
Travelling from Clyde				
Completing part of the Trail	29	\$ 450	2.2	\$ 204
Completing all of the Trail	376	\$ 673	4.0	\$ 168
Total	505	\$ 660	3.9	\$ 169

- Age continues to be a major factor in terms of daily expenditure on the rail trail. This is shown in the table below, where daily per person expenditure is shown by age class and survey.

Age Class	Survey 1	Survey 2	Survey 3	Total
<16	\$ 90.63	\$ 79.21	\$ 89.41	\$ 88.89
16-30	\$ 92.19	\$ 110.63	\$ 92.67	\$ 121.61
30-50	\$ 48.92	\$ 181.11	\$ 153.61	\$ 162.22
50+	\$ 208.11	\$ 185.71	\$ 200.24	\$ 200.00
Total	\$ 177.10	\$ 163.82	\$ 156.41	\$ 162.22

k) Economic Impact.

The following table shows the derived economic impact of the Otago Central Rail Trail on the Central Otago / Otago economy.

Impact Summary	Direct	Total
Output	\$8,159,042	\$12,277,024
GDP	\$4,213,793	\$6,245,289
Employment (FTE's)	96.0	121.3

A reminder that direct impacts are the ones that are measured by the survey (the sample responses multiplied up to the population of annual rail trail users). Total impacts include derived (upstream and downstream) benefits and are calculated by using default multipliers from the regional input output tables.

Compared to 2008 / 2009 these numbers represent increases of between 61% - 78%. These increases are driven by

- Numbers of users increasing by approximately 40% from 10,000 to 14,000
- Daily per person expenditure increasing by approximately 23%

For the previous survey, total output was \$7.2M, GDP \$3.6M and employment 75 FTE's.

The sector break down of this is shown here¹¹:

	Output	Total Output	GDP	Total GDP	Direct FTE	Total FTE
Accommodation	\$3,557,883	\$5,301,246	\$1,956,836	\$2,837,412	51.6	61.4
Food & Consumables	\$1,226,952	\$1,840,428	\$539,859	\$782,795	17.7	21.2
Retail	\$297,569	\$452,305	\$157,712	\$241,299	4.2	5.1

¹¹ An assumption has been made as to the cost allocation of money spent on packaged products. Splits are accommodation 50%, administration 20%, Equipment hire 20% and transport 10%

Road Passenger Transport	\$665,081	\$1,104,034	\$259,382	\$446,136	8.3	11.4
Vehicle & Equipment Hire	\$1,257,894	\$1,735,894	\$717,000	\$975,119	5.0	8.2
Business Admin & Mgt Services	\$1,085,063	\$1,736,101	\$542,532	\$900,602	8.4	13.0
Entertainment	\$68,600	\$107,016	\$40,474	\$61,925	0.8	1.1
Total	\$8,159,042	\$12,277,024	\$4,213,793	\$6,245,289	96.0	121.3

- As can be seen, accommodation derives approximately 45% - 50% of the benefit, followed by food and consumables.
- The impact on retail and entertainment within the region is relatively minor.

I) Final Thoughts

Question 14: Do you have any final thoughts or comments?

Rate / Thought

10

- All been good
- All fine . Great
- All good
- Apple trees along trail great
- Appreciate that there is no cars, no traffic. Didn't have right bike but enjoyed it.
- Beautiful
- Better than expected
- Biking tracks need more advertising - Tramping and walking well covered in NZ books
- Bloody marvellous, didn't expect it so good
- Brilliant
- Bus information poor on official website. Should be more signs about Ophir
- Can't fault it!!!
- Come here every year and do part or all of RT. North to south one year and opposite next year.
- Feel put under pressure to eat or drink. Loved accommodation at Oturehua, Pub prices different between Rail trail users and locals. (Chatto Creek) prices too high
- Could be better promoted for people from overseas
- Distance between toilets sometimes too long
- Don't change it too much
- Easy to book - website great
- Enjoyable track, leave it as it is
- Fabulous
- Fabulous, gravel could be smoother sometimes
- Fantastic - cant believe you don't have to pay for privilege
- Fantastic - completing trail in one day
- Good as it is original, not too much tourist staff, don't change it.
- Good idea to do the survey. Signs: trail Journeys recommended 150th anniversary track, but people get lost at end to find RT. Sign at end would be great also.
- Good thing to do, fun happy
- Great stop, good service

- Happy
- Happy with everything
- Having a great time, Experience is far better than expected.
- Hope it doesn't get to popular
- Hospitality is A1
- Impressed with length of trail
- Its been great. Beautiful countryside. Proud after they finish
- it's good
- It's just great
- Just awesome, blown away by everything - food fantastic
- Just great – amazing
- Keep it up- fantastic
- Kilometre sign confusion - pamphlets and signs different. Needs quirky distance comment signs, would help to encourage tired cyclists
- Lights in tunnels. Impressed that there is no rubbish around. Everyone very helpful, locals great, great scenery
- Like it as it is. Don't make it to commercial. Keep it basic. Come for scenery.
- Like the passports
- Looks like in a western movies, wonderful place
- Lot of fun, great experience
- Loving every minute of it - missed rain and wind over last couple of days
- Need more low impact tourism in NZ i.e. cycleways. Hayes Museum superb
- Nice people - great experience
- On a cycle tour of NZ. Enjoying not having to deal with traffic on trail.
- Picnic tables in places would be good
- Pretty happy so far
- Pretty happy. Happy kiwi's, appreciate their own company
- Should start early on hot days
- So lucky with weather. Would be a different experience if the weather would be different
- Super, scenery fabulous
- Think they is a lot of interest in the RT That's good
- Tiger Hill, Sheep packed into paddock, ribs showing, looked sick, grew up on farm knows how it is.
- Weather is beautiful which makes a difference - really lucky
- Wind blowing
- Wish there were more trail like this
- Wonderful hosts along trail. DOC could be more accommodating to local communities.
- Wonderful, Could may make more out of small towns
- Would like to come back with friends and do explore the area more

- A group of ladies that got together at golf and decided to do the trip - organised on the internet. Having a great time.
- Absolutely wonderful. Great experience outdoors
- Accommodation had all books about RT to read available, really appreciated. So much fun. This is the best holiday. Love it here, like a second home
- All good, service has improved

- Beautiful place, incredible, fabulous, should be a charge to ride it.
- Been great experience - weather good, company great. Reunion week for a group that graduated from Otago University 40 years ago.
- Cant wait to get back with husband and Mum
- Coffee good, beautiful, nice trip. Track compact, here 14 years ago has improved heaps.. Would recommend to other people.
- Connexions didn't co-operate, Bit confused about transfer opportunity
- Couple travel with Grandson. Man age 81. If he can do it anyone can do it!
- Enjoyed experience
- Enjoyed friendly people
- Everything good, apple trees on track pretty good
- Excellent, more shade places would be good
- Fantastic experience. Suggested the RT be closed for cyclist once a year and vehicles could be used on trail to transport handicapped people on the trail. Felt it a shame not everyone can experience it
- Fantastic idea - loving experience. Enjoying pubs in NZ. Has biked extensively during stay in NZ. NZ tops very safe here.
- Food availability sometimes poor, Wish to have more time to see other places. More sightseeing
- Good, great
- Great - recommend it. TJ provided great service although didn't book thru them and had own bikes, they couldn't have been more helpful. (stored bikes overnight, offered backup if required).
- Great, enjoy everything. Great country. Everyone so friendly and helpful. More signs in the little towns would be great.
- Happy
- Keep up the good work, Surface rough but no problem
- Landscape beautiful, nice
- Make RT longer
- More information for more things to see and how to get there. Need more like this in NZ
- Need a bit preparation before you start. Need to be reasonable fit
- Nice, good its for free
- BRIDGES ROUGH
- NZ people very good very friendly.
- Overall happy
- Passports great - more information in passports would be good - saves having to use 2-3 books at once. Meets all expectations - more grade 1 walks throughout NZ
- People are particularly friendly. No complaint. Got attracted to come to NZ just for RT. Have done a lot of biking in different countries. This RT is a pleasure to do. Really professional, good experience
- Pleased with accommodation etc., recommended by Rail trail Services but as a company very hard to get hold of.
- Pretty good
- Pretty pleased with the day
- Quieter than expected, People in Cafes, accommodations without exception. Amazing - very friendly. DOC maps \$1 poor value for money. Maps not good.
- Really good experience - riding both ways - away from caravan and back each day

- Scenery natural, feels like a real holiday, People on RT make experience great
- Scenery spectacular - very friendly, accommodating
- Should be better maps, more detailed, more information ie mountain names. Enjoy that is not crowded with people.
- Signage - some funny ones along the way
- Very impressed with every thing.
- Very impressed, would recommend it to friends
- Well worth it - would recommend it to others
- Whole track is fantastic; Staying with the locals is fantastic. Everyone really friendly
- Will be back
- Would recommend to all. DOC does a great job. Accommodation expensive in relation to pensioners. Support people with limited income i.e. free DOC camping sites could be better.
- Would totally recommend it to anyone, not well promoted in Australia. RT reason to come to NZ

8

- 10 for the coffee
- A very worth while experience
- Accommodation and cafes quite upmarket
- All been good, Trail maps are really good.
- All good
- Amazing people, trusting, leaving your bike without locking
- Certainly recommend to other people. Will do it again
- Couldn't buy a Sunday newspaper along the Trail. Missed that.
- Delighted with the whole thing - lucky with the weather
- Enjoying - too hot. Plaques on gold mine faded at Oturehua
- Good to do it at this time of year
- Great
- Great experience
- Hayes Engineering far too expensive - felt it was a rip off -\$9 entry fee to look around.
- If told how sore bum would get at beginning of trail, someone could 'make a killing' selling soft gel, sheepskin bike seats!!!
- Its wonderful
- Just started but having fun
- Leave it as it is, last natural thing in Central Otago. Don't change it.
- Massage place would be good. Happy. Bought campervan in Auckland -here for 5 months
- Massage would be good – spa
- Would do it again the other way and spend more time - go to Naseby, curling, more sightseeing
- More water available on trail would be good.
- Need better access to weather forecast
- Needs attention from Daisybank to tunnels. Need to concentrate on surface when biking. Enjoys country -friendly (no Rules board) Weather perfect
- Nice scenery
- Official website could be easier to find things. Like Catch a bus.
- Overall very happy

- Road crossings in towns dangerous
- Too cheap should be a cost to ride trail
- Track only down hill would be great
- Trouble finding the start of the trail, sign in Clyde poor. Had trouble finding the River track.
- Trustworthy here - friendly - obliging accommodation places
- Weather is great, scenery
- Website makes booking clunky. Not really clear. Hard to find accommodation on the track Would recommend it to anyone. Recommend training for businesses on track
- Wonderful idea, scenery/people everything. More trails like this would be great. This experience has changed idea - now think SI better than NI. Very welcoming.
- Would be good to have better access to some rivers
- Would like to export to his country – great
- Would really recommend

7

- Been very good, people all wonderful, Nothing a problem
- Biked from Auckland to CO. Got what they expected from RT. More water taps along the way would be good.
- Everything good, a lot of fun
- Great community, can feel they stick & help each other together

6

- So beautiful, come back again at different time.

2

- Woman at ##### was hideous. Rip off not friendly at all over priced. Quality not good. Would not go back and even questions if we would to the Rail Trail again. Will not recommend it to family or friends

Appendix 1: *How well the Rail Trail met expectations (Question 11)*¹²

Rate / Why?

10

- Amazing scenery, well maintained
- Better than they thought
- Brilliant
- Clean, friendly, food brilliant
- Cost, DOC put all work and time in to it. Amazing, everyone nice and helpful
- Couldn't get any better, scenery amazing, little towns great.
- Exactly what we expected
- Excellent, didn't expect so many interpretation panels or toilets
- Good
- Great
- Great experience. Weather has been OK. Great challenge. Love the area
- Haven't expected it to be so beautiful
- Just beautiful
- Love it
- Matched what she thought
- Not as hard as we thought
- No wind
- Pretty cool, good
- Scenery
- Signage great - landscape exceptional
- Thought the surface would be worse
- Tiger Hill
- Unique
- Very nice

9

- A part from extra bumps on road, great
- Accommodation, Dunstan House & Commercial Hotel Omakau. Very Friendly
- Beautiful. Saw a lot of pictures in books before
- Because of heat, Is harder than they expected
- Brilliant
- Didn't expect it to be as tough
- Dusty long straight bits
- Enjoy the whole experience
- Everything great
- Fine
- Great nice, good tour
- Harder than expected
- Hospitality, Package operator, Trail Journeys, Exceeding everyone's expectations
- Is what I read about it. Peaceful
- Its OK

¹² People were asked to say what it would take to make their answer a 10. However, many have taken the opportunity to comment on their experience or where they have been rather than offer a solution. Answers are taken as provided to the surveyors.

- Lovely, beautiful views
- More than what we expected
- Nature
- Need decent coffee
- Need to be fitter
- Nice Experience
- No one gets a 10
- Pretty good, Had heard only good comments and we agree
- Really nice , relaxing
- Reasonable match. Didn't expect the hills
- Scenery
- Scenery, Road good, hospitality great, really friendly
- Signage could be better, distance markers and town signs
- Smoother track
- Some of gravel is hard on bike, Scenery, accommodation , people fantastic
- Standard really good
- Surface quite tough
- Surface would be firmer, easier to pedal
- Too windy

8

- A bit rougher than we thought
- Almost matched expectations - Road a bit rough , rocky
- Been here before, if not would have given it a 10.
- Bikes sizes not right, more information needed
- Bridge approaches rough.
- Enjoyable
- Everyone is very friendly. Good to have more signs for wineries
- Flat and boring in places
- Good exercise
- Good surface, scenery
- Great as expected
- Have to concentrate on surface, thought it would be firmer
- Less wind would help
- Like small towns
- More challenging than expected
- More free camping sites would be good
- More options for eating
- Need more pubs
- No complaints
- Not as flat as one thought
- Not enough info. Missed accommodation
- Quite good
- Scenery, set up, local, real, not become too commercial
- Scenic nice
- Smoother surface
- Spectacular views. No disappointments
- Surface softer than liked
- Surface worse than expected

- Tar seal track!!!
- Terrain is easy, core great, Softer riding
- Thought cycling would be easier, rough in some spots. Scenery amazing
- Thought it was all flat
- Thought it was asphalt, saw the gravel first and was afraid but now it's OK
- Track a bit rougher as we thought - can't enjoy scenery as much as they wanted
- Track isn't difficult. Different experience, enjoy scenery. Peaceful
- Track, Scenery, nice places to stop
- Very good, have a trail at home, surface smoother
- Very Soft in places
- Very well organized, lot of things to do along the way
- Views better than expected, surface rougher than they thought
- What you expected
- Wind wasn't good yesterday
- Wonderful

7

- Going to cycle in Asia. Just wanted to experience the gravel at the RT. Didn't like gates at Alexandra
- Harder than expected
- Harder than we expected
- Less wind
- Need less hills
- Rough compared to France. Has just arrived home after completing 2200km cycle trip around Europe. Surface not as good as Europe but unique, no problem
- Rougher than thought, boring some bits
- Scenery good - too much the same though
- Some parts a great some parts are rough
- Too much wind
- Windy

6

- People amazing, accommodation owner, expected to be tougher
- Read a lot about it before. Roughly know what to expect.

5

- Less gravel - should have left signals etc.

Appendix 2: Aspects of the experience (Question 12).

What would it take to make it a 10?

1. Overall rail trail experience

10

- Cool
- Dam good
- Definitely
- Excellent
- Good
- Great
- Great enjoying it
- Happy to give information
- Loving it, beautiful
- No disappointment so far
- No dramas
- Surface
- Well set up and organised

9

- 10 doesn't exist
- Amazing Beautiful
- Better bike seats
- Better Road
- Don't like instant coffee
- Don't know
- Enjoy, Beautiful landscape
- Finer shingle
- Fitness
- Get to use to rough gravel
- Good
- Gravel could be smoother some times
- Less bumpy, smoother
- Less gravel, quite deep in some spots
- Maybe a 10 tomorrow
- Metal deeper in places
- More fitness
- More hills would be good
- Need motor on Bike
- Nothing they haven't enjoyed
- Nothing! it is perfect
- Planned one section not well enough - too far to go
- Refreshments could be a bit closer
- Should have practiced before hand
- Signage
- Slightly smoother surface would be good
- Smoother surface
- Sunny day would be good

- Surface - Touring bike not perfect for track
- Testing, harder to ride than they thought
- To finish will be achievement
- Too windy
- Very good
- Wants to do it at a different time of the year Autumn
- Wind direction

8

- A bit smoother specially going up this hill!!!
- Better surface, nice but hard to cycle
- Bike not great
- Businesses motivated to do good business. Locals make it
- Can't control to weather, cant get lost, wouldn't change it
- Carrying own bags, too heavy!
- Comfortable seat would be good
- Couple of wines & beers, More nice landscape, ove cloudy
- Different options with Accommodation
- Don't give 10's
- Educating - seat thing
- Few more cafes, more trees, native bush
- Frequent water access
- Good
- Less gravel
- More challenging
- More shade
- Needs sealed
- No great access to food shops
- No wind
- No wind would be good
- Not enough signs
- Nothing is ever perfect
- Nothing is perfect
- Possible the track could be smoother
- Road smoother
- Seal it!!
- Some company would be good
- Surface
- Surface a bit rough along the way in some places
- The bridges uncomfortable
- Transport could be better organised
- Used Trail Journeys because time was short - easier to have it all organized for us
- Weather

7

- Smoother surface
- Fitness
- Less wind
- Smaller smoother shingle
- Surface sometimes to rough. Takes away the enjoyment

- Tamer than thought

6

- Accommodation
- Surface need more maintenance

5

- Hard work

2

- Never could make a 10 it is what it is

0

- Too hot, would recommend a different time of the year

2. Accommodation

10

- Antique Lodge
- Becks hotel great
- Brilliant
- Chatto Creek and Old Shop Oturehua
- Commercial Hotel Omakau
- Crows nest
- Dunstan house
- Dunstan House and Omakau Commercial
- Excellent
- Excellent Tiger Hill Lodge, Omakau. Mill B&B
- Excellent, Antique lodge, Omakau commercial
- Excellent, Tiger Hill Lodge
- Excellent, very friendly
- Fantastic
- Friendly and efficient - Dunstan House & Lauder School
- Good , except Cromwell Top 10 H/p too noisy
- Good Omakau and Lauder
- Great
- Great and friendly
- Great, Crows Nest and Campsite Middlemarch
- Hyde 10+ Wedderburn Rail Stay 4
- Invenair Lodge - local produce would have been better
- Lauder Hotel
- Lovely, couldn't be better
- Muddy creek
- Naseby Camping ground
- Old School house
- Omakau Commercial Brilliant
- Perfect
- Plain and simple regional food, food choices i.e. Scottish heritage - no porridge, Kiwi food?
- PO Back Packers
- really good, cheap (cabin Camping)
- Really nice
- School house in Lauder, very friendly
- Schoolhouse B&B in Lauder fantastic

- Very good
- Waipiata Hotel, very nice people

9

- Camping
- Crows nest out of this world. Adds to experience - no TV etc. great. \$150 per night well worth it.
- Didn't have local fruit
- Free camping as part of Duke of Ed award requirements
- Good
- Good camping
- Good no filter coffee
- Good, friendly, cheap camping
- Great
- Kitchen at Ranfurly camp not good for group catering
- More clean towels, had to ask for it. More brochures to read
- Tenting in Holiday parks
- Tiger Hill Lodge superb
- Very good

8

- 5 #####, Clyde - 10 Omakau Commercial
- Average, good
- B&B. Could be more
- Excellent - Dunstan House and Ophir B&B
- Good Ranfurly Holiday park
- Kokonga Lodge
- More quirky adds to experience
- Naseby Hotel. Didn't get picked up. Had to find new accommodation as owner sold place they had booked
- OK alright
- Small rooms
- Wedderburn Rail Stay 6 Emerald Hills 10

7

- Adequate for price
- Alright, good
- As expected got what we paid for
- Camping ground could be better
- Good
- Great Oturehua Lodge good value for money. Single bed at Commercial in Omakau. Not happy
- Little things, only coffee plunger, no hooks to hang clothes, no clothesline outside.
- More available - would be good not to have to plan ahead- stop where you needed to stop on the day
- No hangers in rooms, Seasonal fruit would be good. Small changes in accommodation
- Omakau Camping ground
- Post Masters - clean More local products
- Problem with Shower at Ranfurly camping ground

6

- ##### not so good

- Camping, tent is good, camp grounds good
- More comfortable beds

5

- No water at first place back at Chatto Creek

3. Eating establishments

10

- Although signage at Hayes Café not good, food advertised was not available
- Awesome
- Chatto Creek
- Cooking for themselves
- Excellent
- Excellent provided with accommodation
- Excellent, Shaky Bridge and Lauder
- Except Clyde Hotel
- Good
- Good Chatto creek
- Great
- Omakau Commercial and Shaky Bridge
- Own cooking
- Own mostly
- Post Office Clyde Omakau Commercial
- Pubs good
- Reasonably priced
- St Bathans was great
- Very good
- Very good, wonderful

9

- All good
- Good cheap
- Good, big portions, homemade food
- Good, perfect, A bit more expensive
- Great
- Great service good food good
- Offer water
- Omakau Commercial great
- Self catering
- Very good, food prices more expensive than in Canada
- Wine expensive \$11 glass

8

- Clyde Excellent Omakau Expensive
- Cooking own food
- Fine
- Good reasonable
- Great just what you want, pubs been good, big portions
- Heaps. Only drinks and ice creams
- Huge meals
- Hyde Hotel

- More local produce
- No coffee/muffin options at cafes
- No seasonal fruit
- Not enough choice
- Pretty good -big portions
- Simple food but good
- To many chips
- Very good
- Wine over priced, food good
- Would like more options - but it was pub food

7

- Breakfast poor, No fresh local fruit in season. Nice a fire already go
- Cook own food, rest places quite expensive.
- Expensive but good
- Fine what you expect
- Food was nice, not very organized at Ranfurly Pub
- Not great coffee
- Ordinary, good, options good
- Prices to high - Meal still frozen in the middle at Post Office
- Pub food- got what paid for - didn't expect anything else
- Some ordinary some fabulous

6

- Over priced, plenty of food though

5

- Quirky, could be better

2

- Terrible

4. Package operator

10

- Cycle Surgery
- Cycle surgery, great to deal with. Recommended by friends
- Expect of transporting bikes
- Hannah at Trail Journeys was great
- Hebikeshebikes
- Pure Trails
- Rail trail services
- Rail trail services. Donna a great person
- Ranfurly Bike Hire
- Hebikeshebikes
- Stratford I-Site
- Superb Trail Journeys
- Trail Journeys Pretty good , bikes good
- Trail Journeys very good, info great. Bikes well maintained
- Trail journeys
- Trail Journeys - Very happy, quality of equipment fantastic
- Trail Journeys no complaints, came up on Google
- Trail journeys, and Google good

- Trail Journeys, excellent service
- Trail Journeys, fantastic, helpful
- Trail Journeys, good, bikes great, helpful
- Trail journeys, good, great, very helpful
- Trail Journeys, prompt and organised

9

- Bikes hired Cycle Surgery
- Bikes only
- Ranfurly Bike hire, Speedo on bike would be good
- Trail Journeys Excellent
- Trail journeys, good bike had a problem with bike . Got it fixed fast
- Trail journeys, Would like to have better collection of bikes - seats

8

- Dropped off at wrong place. Connexions. Cycle Surgery x10
- Luxury trail (Lisa)
- Trail Journeys
- Trail Journeys great. Could spend more time on bikes
- Trail Journeys More information about the little towns
- Trail journeys
- Trail Journeys, Forgot his bag on first day

7

- Cycle Surgery - communication could be better
- Rail trail Services slow to respond, some information not good enough
- Trail Journeys Hiccup with accommodation at Chatto Creek but did find other accommodation for them.
- Trail Journeys, very good, little problems
- Transfer Cycle surgery

6

- ##### Tours operator Not happy, miscommunication - didn't get pick up
- Didn't get what expected
- Trail Journeys a bit expensive

4

- Rail trail Services, service wasn't great, had to push for information

0

- Trail Journeys, charged for change 3 times
- Wouldn't rate as Rail Trail Services were hard to deal with - communication bad

5. Rail trail signage

10

- Although it could be better at Alexandra
- Always informs you
- Brilliant
- Confusing at Hyde
- Easy don't get lost, know where you are.
- Easy to follow
- Excellent
- Good
- Good but not over the top

- Great
- Great impossible to get lost
- More signs between, more clear
- OK
- Perfect
- Quite Good
- Really good
- Some signs faded
- Very good

9

- Clearly sign, Poolburn sign would be better both side and a couple more
- Could be more distance markers
- Easy to follow
- Excellent. Missed sign on highest point
- Fine good, every station signed, don't need more.
- Fine no problem
- Good
- Good easy way
- More information about science i.e. schist rock. Missed Ophir
- Needs to be bigger in places
- Really good, cant miss it
- Very easy to follow
- Very good
- Very good, Hyde a bit poor

8

- Alexandra could be better
- At Clyde end not good, got lost getting to start of trail
- Better attraction signs
- Came off the trail (Clyde-Alex)
- Could be better
- Could be more distance signs
- Fine
- Good
- Map fantastic - towns no incentive to detour
- More signage at Clyde. More traveling towards Clyde, Best way?
- More signs from towns
- Need more
- Poor could be better
- Sigh out by 10kms at Rock and Pillar

7

- Could be better at Alexandra end
- Fine
- Girls got lost in Omakau
- Side roads should be better signed

6

- Could be better
- Could be better - more

- OK maybe a bit more frequent signage. Not consistent. Asked about concrete mileage signs. Didn't know
- Omakau sign poor road crossing, town name and distance to next town would be great

5

- More distance markers

4

- Could be more

2

- Clyde (Alex) to Chatto Creek poor signs

0

- 1 place missed, (Old Pub Oturehua) Little bit more sign about interesting sites
- Clyde to Alex - signage to i-site poor
- Confusing km pamphlet v's boards different
- Confusion maps v's signs
- Got lost twice , could be better - Alexandra & Omakau
- Highest point could be better marked
- inaccurate kilometres on signs
- More signage in places, hard to find The Mill B&B
- Not good this direction - into towns not adequate
- Signage at town would be an advantage eg; Omakau. Accommodation arrows. Township arrows
- Signs in Alex not good enough, got lost in town, rest really good.

6. Interpretation panels

10

- Brilliant, makes people stop
- Excellent
- Good
- Good great information
- Good info about history
- Good no confusion
- Great
- Kilometre confusion.
- More of them
- Nice, clear - good information , excellent
- Not to much info not to little
- Photograph each one
- Read all, Very interesting
- Read most, good consistent
- Very good
- Very good interesting
- Very interesting

9

- Cant really make it better
- Fantastic Really good
- Good
- Good , all information on it
- Good easy reading

- Good interesting
- Great, have stopped and read most of them
- Informing, good
- Interesting Lots
- More
- Saw a mistake but can't remember (ganger shed)
- Very interesting maybe show whole area on map. (you are here)

8

- Bigger writing (foundation for the blind guide lines?) White writing on brown not good,
- First time she has stopped to look. Good
- Good
- haven't read them all
- Like these good
- Love those. Some of kilometre notification not correct.
- OK

7

- Didn't read any
- Would like more information

0

- To much text in Ganger sheds

7. The riding surface

10

- As expected
- Better than expected
- Better than thought
- Big stone in places
- Bumpy but pretty good
- Clean and rubbish free
- Expected
- Good
- Good till here anyway
- Great - don't tar seal
- Lot better than they thought
- Smoother than they thought
- Smoother than thought
- That's what it is
- Well presented
- What you expect
- What you expected

9

- As expected
- As expected - harder to ride than tar seal
- As expected - wouldn't like it any different
- Better than expected
- Bumpy
- Clay soft in places

- Could be smoother
- Don't change it (tar seal no-no-no)
- Fine
- Generally good
- Good
- Good in places, not too bad
- Just right
- Keep it just the way it is OK
- Mostly good – patchy
- No complaints really
- No problem, got perfect bike
- OK better what they thought
- Pretty good, notices when farmer shift his sheep
- Smoother
- Some worse than others
- Sometimes not as good
- Too soft
- variable – fine
- varies
- Various
- What you expect, perfect
- What you expect, well maintained

8

- A bit rough in places
- A bit smoother
- As expected
- As good as it could be - a bit rough in places
- Better than they thought
- Bridges rough
- Could be better. It is what it is! Would be nice to be smoother
- Expect gravel road
- Fine what you expected
- Good , spots big gravel
- Good for mountain biking, safe
- Hard surface, have to watch all the time
- Hard to ride, but she didn't have the right bike.
- Its what a RT is all about
- More maintenance needed, loose gravel - muddy
- Needs a bit of up keep in places
- New gravel to soft
- Not too bad but.....
- OK
- Patchy
- Pretty rough in some places
- Quite hard sometimes, well maintained
- Rough
- rough in places
- Rough, hard climbing

- Smoother
- Some could be smoother
- Some places a bit loose gravel, general good
- Some places rough but reasonable
- Too rough in places
- Variable
- Wonderful sections quite bumpy

7

- Big stones
- Could be smoother
- Gravel loose in places
- Hard going
- Hard to good
- Middlemarch to Hyde Great - then rougher
- OK Afraid of bike, more suitable for road
- Parts interesting, some easy some heavy
- Pretty tough certain section
- Rough have to stay in line
- Rough in some places
- Rough stones, lighter stones
- Rough to much
- Rough, cant do anything about it
- Smoother
- Soft in places
- Some parts big gravel, but enjoy it
- Some rough patch's, as expected
- Too much metal
- Tough in some places
- Variable

6

- A bit rough, difficult. Gravel could be packed better
- As expected
- Bit rough in places
- Bumpy
- Could be smoother, parts good some not so good
- Less gravel would be good
- Not graded enough
- Smoother would be good
- Surface again

5

- A bit rough
- Bumpy
- But better than they thought
- Could be better
- Could be better, smoother
- Parts pretty poor- ordinary. Worst from Hyde to Middlemarch
- Rough, but expected it. Quite demanding
- Too rough. Gravel parts too big

4

- Could be smoother, quite rough
- Tough

3

- Too rough , finer

0

- Finer metal please
- Rough in places
- Rough in places - stock on track
- Rough in places as expected

8. Access to drinking water

10

- Could be handy to have more taps, but operators happy to fill
- Fine
- Get it through operator
- Good plenty
- Info quite clear to take your own
- No Problem
- No problem maybe more taps
- No problem, bought own
- No Problems
- Not at this time
- Own
- Own water, but saw a couple of taps
- Plenty
- Plenty of water
- Told to take own
- Well warned before starting

9

- Carried a bottle
- Carry a lot - no problem to fill up
- Hasn't been a problem
- No Problem
- No Problems
- No problems yet
- No problems, heaps with them
- No problems, only one tap seen so far
- take own no problem
- Wherever you stop, fill up bottle, no problem

8

- No Problem
- No problem because it is not so hot, don't need to much
- Not noticed, but no problem. Saw one on Lauder

7

- Carry own. No problems, Plenty of cafes, pubs on the way.
- MORE
- More taps

- No Problems
- No problems, distances to next little town not to far
- On track itself quite poor
- Plenty of their own
- Would like to see more

6

- Carry plenty, may be a problem on hot days
- Could be better signage, and some more taps
- Not obvious
- Own water. Not enough taps

5

- Could be closer. More taps on track
- Could be more
- Could be more taps
- Haven't noticed any
- More taps would be good
- Need More
- Not great
- OK
- There isn't any
- Where ever you stop you fill up

4

- More taps

3

- Not a lot taps but enough places to stop. Bad
- Poor only in town - you have to buy

2

- Poor

1

- Bought own Poor
- Poor but informed to bring own

0

- More water needed
- Poor

9. Toilets

10

- Disgusting in Middlemarch
- EXCELLENT
- Fine
- Fine, clean nice, plenty
- Good
- Good Often
- Haven't used them yet 10 for Wedderburn
- If you need them
- Immaculate
- Lots
- Nicely spaced, clean

- OK for outside toilets
- Pleasant Nice Alex

9

- Clean
- Clean, enough
- Fine
- Fine , clean
- Good clean
- Just used one and it was fine
- More signage along the trail
- Normal, Fine OK
- Not used it yet
- OK
- Plenty
- Yes its like camping house

8

- Alright enough
- Fine
- Haven't used them, plenty of it
- Lots
- No toilet paper in Ida valley
- OK
- Very dirty

7

- A bit smelly
- Cant expect more
- Fine, clean, nor smelly
- Haven't used them but plenty
- Plenty but haven't used them

6

- Could be more
- OK but water at side would be good
- toilet paper missing, dirty

5

- Not enough
- Not enough but good

1

- Boys didn't like them dirty

0

- Clean Nor offensive

10. Visitor information centres

10

- Alexandra
- Dunedin
- Helpful
- Outstanding
- Ranfurly

- Wanaka

9

- Need maps
- Ranfurly
- Very Good

8

- Cromwell
- Ranfurly

7

- Ranfurly

5

- Alexandra

Appendix 3: Survey questionnaire

Interviewer Notes:

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

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.

- Where are you from? _____
- How did you first learn about the rail trail? _____
- Where have you gone to find out information about the rail trail?

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

- How many times have you visited or ridden the rail trail? _____
- Are you completing the whole trail or just a section? _____
- Why are you doing the trail at this time of the year? _____
- How many days are you spending on the rail trail? _____
- How many nights is your total visit to Central Otago? _____
- What activities have you or will you do during your stay in Central?

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

- 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?

- 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		

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

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

12. How many people are in your immediate group?

13. 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	\$

14. 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.