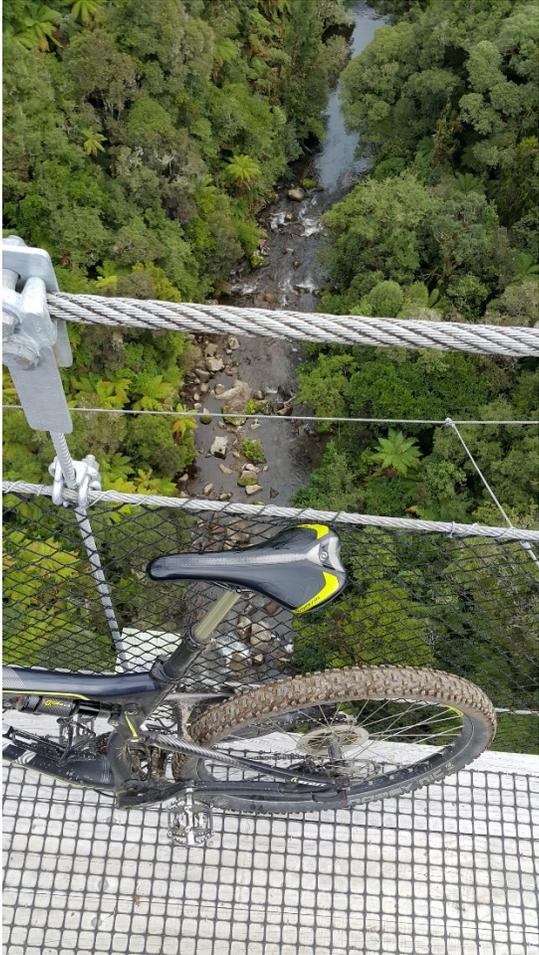


Timber Trail Marketing Strategy and Action Plan 2016



Prepared by Destination Planning Ltd. June, 2016

for



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Introduction

This document provides a three-year marketing strategy and a one-year tactical marketing plan for the Timber Trail in Pureora Forest Park in the Central North Island of New Zealand.

The objectives of the strategy are:

- To establish a clear and consistent brand, imagery and story that all stakeholders can use in their promotion of the trail.
- To establish a strong digital presence for the trail that is backed up by timely expert advice and booking assistance.
- To develop and curate content that can be pushed through multiple channels to the target markets for the trail.
- Support the development of packaged Timber Trail experiences to attract the type of visitor who will stay longer and spend more per day on their trip.

Delivering on these objectives will support the higher level goal to grow of Timber Trail users from 6,000 to 10,000 by 2020. This will result in new business development, new job creation, town and village re-vitalisation and increased visitor spend filtering into the local districts' economies.

Background

The Timber Trail opened in February 2013, with investment of over \$5m. The Department of Conservation built the trail and is responsible for the overall management of Pureora Forest in the Central North Island where the trail is located. It also crosses Iwi and private land. The Department of Conservation currently fund the ongoing maintenance and management of the trail.

The marketing of the trail has been highly fragmented with no universally applied brand or messaging. Despite the lack of coordinated marketing the trail, has been very successful with estimated use reaching around 6,000 per annum over four summer seasons to 2016. The experience is spectacular and trail imagery is enthusiastically picked up and shared by trail users and media.

In February 2015 a Timber Trail Advisory Group was established to focus on the long term management (maintenance, development and use) of the Timber Trail for the benefit of all, whilst ensuring cultural and natural values are protected. The Timber Trail Advisory Group includes landowners on the trail, Iwi, DOC, Ruapehu District Council and Waitomo District Council.

In November 2015 Waitomo District Council and Ruapehu District Council resolved to support the establishment of a marketing body for the Timber Trail cycle trail. It was felt by the two Councils that support was required to ensure the Timber Trail has a strong regional and national presence.

Trail Description

The trail is 84km long, following historic tramways, old logging tracks, existing roads, plus approximately 20km of new trail. It is mainly a grade 2 standard for cycle tourists (a minimum of 1.5m wide, 0-4% gradient). It is benched with a reasonably smooth packed surface. Several new bridges have been constructed along the trail. Part of the first section of the trail is Grade 3 due to some steeper sections.

It is most suitable as a two-day journey, but also suitable for one day rides on shorter sections, or the full length of the trail for fit riders. Most cyclists ride north to south, which is predominantly downhill.

The trail's natural starting point is Pureora village finishing in Ongarue. In the last season, due to publicity about the difficulty of the northern trail section, use of the easier southern section which accesses the Maramahata Suspension Bridge and Ongarue Spiral, has been more popular. There are Department of Conservation camping sites and cabins at Pureora village and Pa Harakeke has self-contained units available. Several B&B style accommodation options are available at the Ongarue end. Blackfern Lodge is currently the only fixed accommodation option along the trail and is located around the half way point. A 5km side trail has been cut for bikers to get to the lodge. A new Timber Trail Lodge is due to open at the Piropiro mid-access point in January 2017.

There are a number of camping spots along the trail with Piropiro ending itself to be an ideal overnight site for camping cyclists as it is located midpoint along the Trail. Shuttle businesses are being used by campers to transport camping gear to Piropiro and then bikers back to the start of the Trail.

A variety of barriers are in place, designed to ensure most of the trail is restricted to cycling and tramping only. Quad bikes, motorbikes horses and 4x4 vehicles are permitted on limited specified sections of the trail only.

The area is subject to reasonably harsh weather at times, with very cold winter conditions. There is year round rainfall which can be significant at any time of the year. DOC has recently carried out significant maintenance work on the northern section of trail which will help to address some of the negative feedback.

Timber Trail Tactical Marketing Action Plan 2016-17

This action plan table provides the key activities to be completed or commenced in the first year of the three-year strategy. The remainder of the document contains more detail on the various strategic initiatives.

Activity Heading	Action	Notes	Priority/Delivery
Brand	Ensure management of the Timber Trail identity on TripAdvisor and Google Business	Respond to questions and reviews on TripAdvisor and Google Reviews Post updates and more images	URGENT
	Establish timely, professional enquiry response on the existing web site (TheTimberTrail.com)	(potentially i-SITEs)	URGENT
	Develop consistent brand story and images	The logo does not necessarily need to be changed consider locator/differentiator, possibly Pureora, NZ Priority is story and description which can be consistently used by all TT partners	November 2016
Website	Establish a high quality (mobile-first) web portal that is clearly branded, official, impartial and provides comprehensive trail planning information and links to book with operators or the i-SITEs.		December/January 2016
Content	Engage operators and DOC knowledge to coordinate detailed vetting and correction of trail information on own and 3 rd party websites and publications.	This may take many months if not years to achieve due to publishing cycles but needs to be worked at relentlessly	Commence October 2016
	Upgrade the core visual library	Contract new video, drone, 360 pano and still image shoot. Develop robust media gallery providing access to high-res content. Budget for significant refresh every 2-3 years	October/November 2016
	3 rd Party sites (TNZ, NZCT, DOC, RideNZ.co, RTOs etc) Constant championing fresh content	New visual media provided	November 2016
	Establish a page within the official site for user generated images, vetted and posted on an ongoing basis.		May 2017

Activity Heading	Action	Notes	Priority/Delivery
Social Media	Establish official Facebook account	Acknowledge most riders will not be repeats, especially internationals. The number of long-term likes will not be huge. This is about increasing awareness and driving people to the main web site. Encouraging riders to share tagged images and video Increase SM content that will come through in search engine results	October 2016
	Establish Instagram account	Largely replicating Facebook posts	October 2016
	Establish official YouTube channel	potentially add Vimeo with same content	November 2016
	Establish official Pinterest account		December 2016
	Establish a free Hootsuite account to enable efficient multi-channel posting and monitoring.		April 2017
	Develop an annual content and social media calendar to strategically map out news items and posts.		October 2016
	Seek to have TT content posted in Asian channels such as WeChat and Weibo by participating RTOs and TNZ.		June 2017
Collateral	Develop a TT Brochure / Map with semi-waterproof coating.	This aims to replace DOC brochure, Timber Trail Accommodation Brochure and the RTO trails map. It should create a more relevant and higher quality publication in greater quantities by combining the existing resources and funding. All collateral must be developed with a “story telling” approach supported by great imagery (not just informing the facts).	February 2017
	Produce promotional branded banners and signs for event use by the TT marketing coordinator and partner marketing organisations.		To be determined
	Develop quality, bound trail guide booklet	This is to provide lots of supplementary detail and imagery to act as both a guide while doing the trail and a memento/souvenir to gain wider exposure as riders’ friends discover it.	June 2017
Advertising	Print advertising limited to AA Cycle Trails Guide.	No paid advertising in magazines or newspapers unless there is an extraordinary media leverage opportunity through editorial.	March 2017
	Modest on-line ad budget limited to Adwords and Facebook	Aligned to TNZ and RTO activity Seasonal focus to drive growth outside peak (Instagram Ads are just being trialled)	March 2017

Activity Heading	Action	Notes	Priority/Delivery
Promotion - Consumer	Trial promoting with measurable outcomes at 1-2 NZ consumer shows per annum.	EG, Lake Taupo Cycle Challenge, National Field Days, Lifestyle Shows. Meticulous result monitoring e.g. names added to database, bookings with operators.	One event booked by June 2017
Promotion-Trade	Ensure RTOs and TNZ have accurate and high quality resources for their trade education. Proactively support all relevant trade hosting opportunities.		Engaged November 2016
Merchandise	Develop TT merchandise. Distribute on-line and through i-SITEs and operators, particularly Pa Harakeke and the Bowling Club Concession in Ongarue.	Can only occur once the brand is refined. Careful trials of small number of products to manage stock risk. In addition to the usual cotton T-shirts and caps, investigate bike specific products such as water bottles, cycling tops, bike pants (often an essential value-add for people progressing to this type of riding)	June 2017
Booking Systems	Encourage operators to implement their own future-proof live booking systems with channel manager interfaces to other res systems.	The web site will encourage direct bookings with operators and offer independent itinerary booking support from the i-SITEs. Maintain dialogue with Mike Barnett (Rail Trails NZ) and Tomahawk about potential booking systems.	November 2016
	Investigate feasibility of a complete Timber Trail booking system covering accommodation, shuttles and transfers.		May 2017
Product Development	Facilitate business improvement for operators by partnering with NZCT Inc, RTOs and development agencies.	Digital promotion and booking systems Customer service Export readiness, Pricing, trade commissions, Packaging and value add	One workshop by June 2017

Activity Heading	Action	Notes	Priority/Delivery
Results Measurement	Work with DOC to improve the trail counting data timeliness and accuracy.	This could include rostered data collection by operators traversing the trail rather than waiting for the next DOC ranger to access the loggers.	Ongoing
	Work with a tertiary education provider and NZCT to implement a bespoke economic impact survey of Timber Trail users.		March 2017
	Establish a report summarising TT customers of the main shuttle and accommodation operators.		March 2017
	Improve the ratings and response to TripAdvisor and other on-line reviews.		ongoing
	Establish a Dashboard report bringing together key digital channel results.	TT Website unique users, page views, visit duration, referral sources Visits to Timber Trail pages in TNZ, NZCT, RTO and RideNZ web sites	December 2016

Situation Analysis

Timber Trail Use

NZ Cycle Trails Inc. has been having trouble obtaining good quality data on all of the Great Ride Trails and is placing greater emphasis on robust monitoring to enable reporting.

The following table has summary annual figures from the combination of DOC Trail Counters which include two types of data loggers. As prototypes, they are still to be verified carefully.

This data is per summer season, so roughly Year Ended June.

2011 (not open)	195
2012	799
2013	3,666
2014	5,786
2015	6,279

DOC estimates around 300 walkers per season

For the recent 2016 season, although there have been anecdotal statements made about continued significant increases this is not borne out by the data loggers. There have been some decreases on the northern Pureora – Piropiro section while the Southern section is similar to last year. Camp 10 (mid southern section) counters show 13% higher numbers this year than last year and almost 50% higher than Angels Rest numbers on the Northern Section. This is in line with reports that people prefer the southern section, and more have been just doing one day. That's also possibly linked to lack of accommodation.

Bruce Maunsell (Timber Trail Lodge) concludes that 6,000 is a reasonable indicator of total bike numbers on trail.

Likely reasons for the softening of numbers on the northern section include:

- intermittent service at the beginning of the trail let many customers down
- reputation for being boggy and more difficult
- lack of accommodation.

More people are doing the second section from Piropiro to Ongarue and this is confirmed by the growth in business for Epic Shuttles which is based in Taumarunui and focuses more on the southern end. Some of these riders are doing a short return trip from Piropiro to the Maramataha Swing bridge and back; and from Ongarue to the spiral and back.

Blackfern Lodge has leveled out over the last couple of years at around 2,500 guest nights. Bookings are being made a year out especially for holiday weekends such as Easter. They are full most weekends in the main season but have room for more mid-week customers. It shuts down in July.

In the Timber Trail Lodge TGP Grant Application, it was estimated that without more accommodation options on the trail, users would peak at around 5,500 and stabilise. With the new lodge the trail the number of users was forecast to increase to around 7,000 during the first full year with the lodge and reach 10,500 in the third full year with the lodge.

The Central North Island Cycling and MTB Marketing Network is targeting average 15% growth per annum across the wider region’s trails. The table below extrapolates 15% growth from an estimated 2016 base of 6,000.

2016	2017	2018	2019	2020
6,000	6,900	7,935	9,125	10,494

With the flattening of numbers in the recent 2016 season and the delay in projected opening of the Timber Trail Lodge, some of the forecasts may need to be revised downwards. However, if marketing and servicing of enquiries is better coordinated; and with the addition of accommodation and marketing effort by the Timber Trail Lodge, 10,000 users per annum is an acceptable target for the 2020 summer season. This is also well below the use on many of the other Great Rides as outlined in Appendix 1.

Marketing by partners

NZCT

NZCT Inc has a “Cycle Trail and Mountain Biking Marketing & Communications Strategy 2014-16” which never received adequate funding for implementation. However, Craig Wilson is contracted to carry out some of the proposed activity. A priority is working with TNZ on the brand messaging and accurate representation of the trails. There is a lack of clarity over roles and activities of the two organisations although at this stage NZCT is leaving all offshore work to TNZ and the IMAs/RTOs. NZCT carries out the following:

- Maintaining the NZCT web site
- With Cassie Esposito, managing the NZ Cycle Trails Facebook page.
- Publishing the NZCT Guide / Product Manual used as the key marketing collateral at TRENZ.
- Leveraging around \$25,000 from a small group of national partners such as Britz and Interislander
- Representation at TRENZ (reports most buyers there are not specifically interested in cycling and are only looking for ½ to 1 day itineraries. Recommending not attending TRENZ next year.

In the 2016 directory the ½-1 day cycling experience section has no Timber Trail options. This should at least include the Piopiro-Ongarue section.



NZCT has been frustrated by the disjointed governance of the Timber Trail. This relationship needs to be strengthened to leverage more promotion for the timber Trail.

Future marketing work by NZCT is still being determined based on available funding and TNZ's imperatives.

TNZ

TNZ's main marketing tool is www.NewZealand.com which received 9,850 annual visits to its Timber Trail page for the year to May 2016. The main Cycling and MTB hub page has a slideshow hero image of the Timber Trail and delivers listings for any operators taking up the free database listing option. This is likely to remain one of the most important channels for the Timber Trail with content also replicated within each of the foreign language sites, although this level of content is not translated. TNZ's Cycling and MTB hub is being reviewed and is likely to become more comprehensive, especially for the relatively weak MTB content. This is due for completion end of June 2016. Partnerships with other cycling and MTB web portals are being considered (e.g. integrating Trailforks GPSd maps which link with Strava and include trail status reporting).

Page (Conversion) Report (All Views (No Segments)) | Fri, 1 May 2015 - Tue, 31 May 2015 | Click generated by Adobe Analytics on 4/23/16 NZT, 17 May 2015

Page (Conversion)	Visits	Bounce Rate	# Active Visits	Active Visit Rate	Total Referrals Generated	Referral Rate	Average Time on Site		
1. www.newzealand.com/cycling/features/the-timber-trail	9,852	100.0%	58,31%	1,968	100.0%	349	100.0%	3.5%	00:02:40
TOTAL	9,854	58.31%	1,968	20%	349	3.5%	00:02:40		

TNZ has been marketing cycling and MTB in Australia and in USA where a campaign used Phil Keogan from the Amazing Race. The more hardcore MTB market was targeted through Crankworx and the

Pioneer Adventure Race. However, from 2016 TNZ has pulled back to focus on Australia. The key activity has been the Megan Gale video campaign which included the Timber Trail and TNZ's global partnership with Facebook using sequential targeted advertising and re-marketing. Active cyclists are the target with a contract through to Dec 2016 and the second phase in August-September targeting East Coast Australia. As it is Facebook ad focused, this limits the opportunity for the Timber Trail to have posts re-shared by TNZ.

TNZ have struggled to find a good trade partner for cycling but World Expeditions is being considered. The on-line trade training module for cycling was considered too large and is currently being revised for release mid-2016.

TNZ attended a major Melbourne cycling event in 2015 but found that the attendees had limited interest in learning about cycling holidays so they do not plan to continue this activity. An initiative is being planned with Avanti to target activity through its 400 strong retail distribution network in Australia.

The Timber Trail Marketing Coordinator needs to proactively check and offer update info for the main website and the on-line training module content to ensure the content is accurate and compelling.

DOC

The Timber Trail page on DOC's web site currently provides the best information on the trail experience and riding it safely. This is now the page that the NZ Cycle Trail web site links to. However, it does not help customers find local operators to plan and book their trips. The DOC brochure/map is the main free piece of collateral available through its visitor centres and many i-SITES.

RideNZ.co

The Central North Island Cycling and MTB Marketing Network has three key pillars to its business plan.

1. Launch of a central North Island website portal
2. Targeted promotional collateral and promotional digital media aimed at the Australian, and US cycling and mountain biking community via subscription based media.
3. Targeted PR for the markets of Australia and the US – aligned to Tourism New Zealand's marketing and communications target markets and plans.

The website and Facebook page was successfully launched and received good coverage and some media activity has been executed. The site has an innovative approach to enabling users to select their rider type to find the most suited trails and put together an itinerary. It is still a work in progress but presents the Timber Trail well. The ongoing funding commitment from a large number of RTOs to fully implementing the proposed business plan is uncertain at this stage. On the assumption the project continues, the Timber Trail Marketing Coordinator needs to maintain a close relationship and can partner on projects such as visiting media, trade hosting, image shoots, news and social media shares.

RTOs

The websites, social media pages and promotional collateral of Hamilton & Waikato Tourism, Visit Ruapehu and Destination Great Lake Taupō all provide coverage of the Timber Trail and will need to be vetted and provided suggested updates on an ongoing basis. This includes the RTO official visitor guides which is their most widely distributed printed collateral. The Explore event in Auckland, where inbound tour operators are educated on regional products presents an opportunity for Timber Trail participation.

The RTO teams are also involved in supporting TNZ's International Media Travel Trade Hosting Programmes as well as initiating some of their own domestic media famils. The Timber Trail Marketing Coordinator can help grow this activity by coordinating local logistics with operators and escorting.

i-SITEs

The i-SITEs surrounding the trail have varying ownership structures. Whilst they all carry information on the Trail and some staff have done familiarisations, to date there has not been any proactive positioning of the i-SITEs as the go-to for trail expert advisers. The aim should be to familiarize as many i-SITE staff as possible with the trail, rider experience levels, supporting accommodation and services. Te Kuiti and Taumarunui i-SITEs in particular could be a primary booking gateway for the trail. The recently announced i-SITE and DOC partnership at Tongariro Visitor Centre (Whakapapa) also presents a great opportunity to promote the trail and service it with information and bookings.

Cycling & MTB Markets for NZ

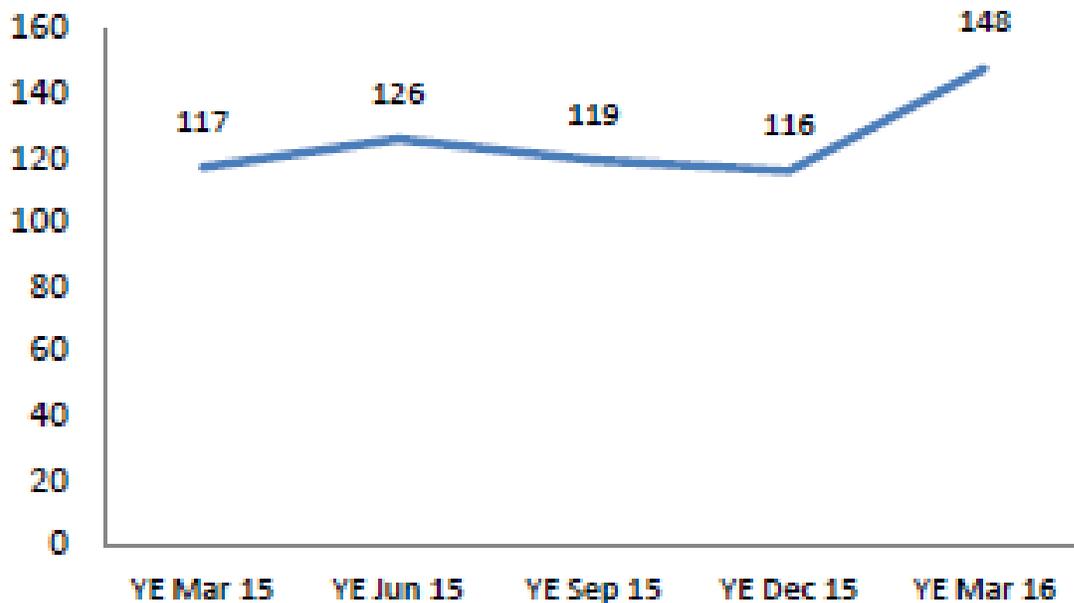
Several reports on international and domestic cycle tourism markets are available on the NZCT resources web page and the Tourism New Zealand corporate page. Some excerpts relevant to the Timber trail are provided. However, this data is all quite old and the market is likely to have evolved considerably since 2012-13.

International

Cycle tourism represents 6% to 12% of tourism activity in international markets whereas in New Zealand cycle tourism only represents around 4% of all tourism activity. This suggests significant growth potential for inbound cycle tourism for New Zealand as it becomes better promoted.

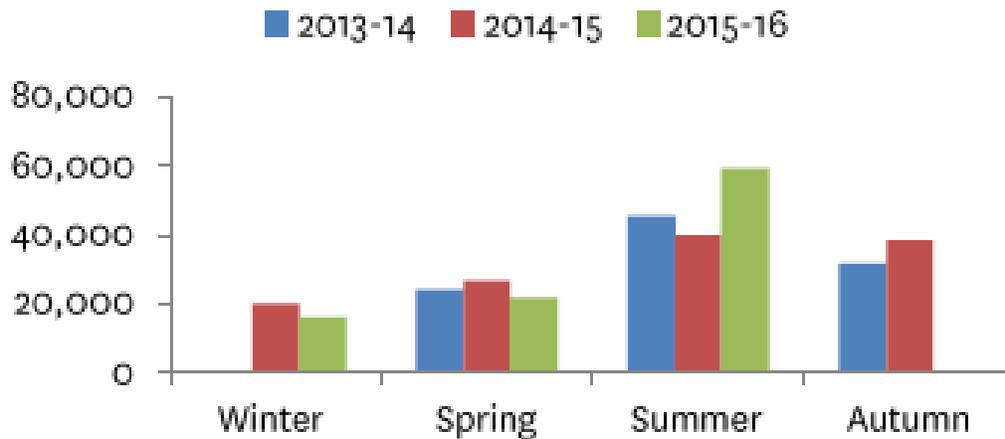
A total of 73,000 international visitors biked in New Zealand in the year to June 2013. Over six years 388,000 international tourists had participated in a cycling activity. On average these travelers stay longer (41% for more than a month) visit more regions and spend more. Significant growth in cycling visitors has occurred since.

Holiday Visitor Cycling Participation (000)
Number of Holiday Visitors Aged 15+

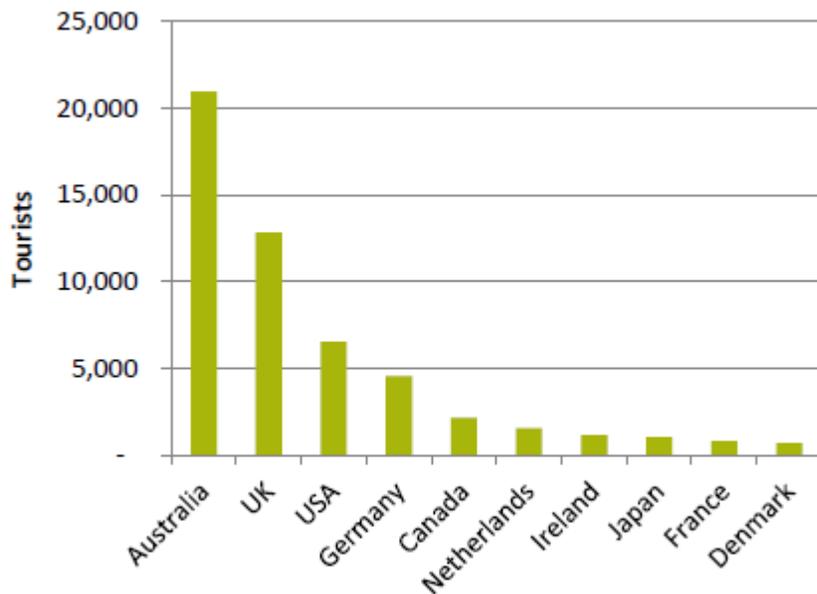


Not surprisingly, participation is higher in Summer and Autumn with significant growth in the most recent summer season.

Holiday Visitor Cycling Participation by Season

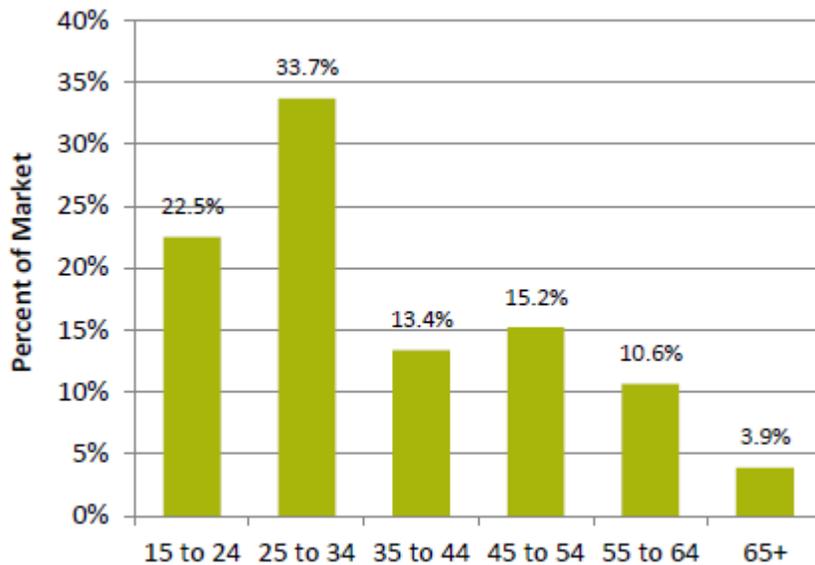


Cycle Tourists by Market 2008-2012



The graph above shows Australia, the UK and USA were the top 3 source markets for cycle tourists. However, in terms of propensity to cycle while in NZ, several European and British Isles countries rate the highest.

Age of International Cycle Tourists 2008-12



Cycle tourists stay much longer than the average with 35% staying a month or more. 94% were independent travelers, 54% were male, 62% on Holiday with 24% VFR. They are more likely to be travelling alone (48%) with 27% travelling with a partner or spouse.

The MBIE New Zealand Cycle Trail Evaluation Report (2014) estimated 35,000 international visitors rode off-road trails in the year to June 2013. Since then several new trails have been completed.

Tourism New Zealand and the NZCT have strategies that target growth rates of between 15 and 20% per annum.

Research commissioned by NZCT showed visitors using cycle trails were staying one to three nights and spending between \$131 and \$176 a day per person.

Domestic

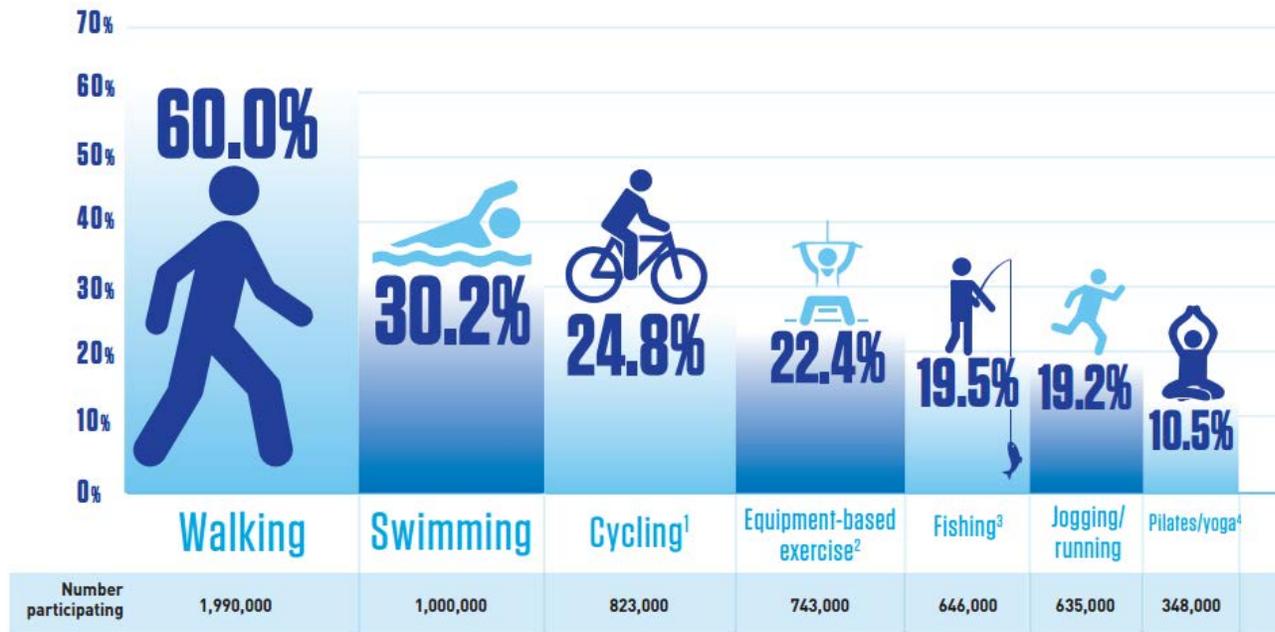
Heart of Biking (Nelson) states that the largest group of New Zealanders who ride are aged 35-49. For these visitors a multi-day ride is often not practical (family, or too costly). However, a day trip from base accommodation or an easy trail route is a great 'add-on' holiday activity. This market wants stunning scenery, cultural and social experiences and consistent and acceptable services.

NZCT has Domestic cycle tourism growth targets of 20% per annum. The customer database built up by the Principal Trail Operator on the Hauraki Rail trail is reportedly around 3,000 people of which 90% are domestic and the majority from Auckland.

Sport NZ Active NZ Survey 2013-14

The Active NZ survey of New Zealanders shows Cycling as the 3rd most popular sport and recreation activity overall.

The 20 most popular sport and recreation activities participated in over 12 months



¹ Cycling includes mountain biking and cycling.

Cycling was the number 3 activity for men and number 4 for women.

The 20 most popular sport and recreation activities participated in over 12 months by gender

Men		%	Number of men participating
1	Walking	46.8	744,000
2	Fishing	29.2	465,000
3	Cycling	28.4	451,000
4	Swimming	27.0	430,000
5	Equipment-based exercise	23.2	370,000
6	Jogging/running	20.3	323,000
7	Golf	15.0	238,000
8	Tramping	11.2	178,000
9	Football	10.5	167,000
10	Hunting	9.7	154,000
11	Canoeing/kayaking	9.5	151,000
12	Cricket	8.7	139,000
13	Touch rugby	7.3	116,000
14	Basketball ⁵	7.2	115,000
15	Snow sports	6.9	110,000
16	Rugby	6.8	109,000
17	Tennis	6.6	106,000
18	Shooting	6.2	99,000
19	Surfing/bodyboarding	6.2	98,000
20	Table tennis	6.0	95,000

Women		%	Number of women participating
1	Walking	72.2	1,245,000
2	Swimming	33.1	570,000
3	Equipment-based exercise	21.7	374,000
4	Cycling	21.6	372,000
5	Jogging/running	18.1	312,000
6	Pilates/yoga	16.6	287,000
7	Dance	14.1	243,000
8	Aerobics	13.4	231,000
9	Fishing	10.5	181,000
10	Tramping	8.3	144,000
11	Netball	8.1	139,000
12	Callisthenics	7.1	123,000
13	Canoeing/kayaking	6.9	119,000
14	Tennis	6.0	103,000
15	Snow sports	5.5	95,000
16	Aquarobics	4.9	84,000
17	Golf	4.6	80,000
18	Exercising at home (other) ¹⁰	4.4	75,000
19	Exercise classes (other) ¹⁰	3.8	65,000
20	Badminton	3.6	61,000

Cycling saw the largest increase in participation, with Women up 4.4% and Men up 1.5%.

Changes in participation in the top 20 sport and recreation activities			
All adults 16+ years	2007/08 (%)	2013/14*** (%)	Difference* (%)
Walking	64.5	59.5	-5.1
Swimming	34.3	30.4	-3.9
Cycling	22.1	25.2	3.0
Equipment-based exercise	26.4	22.8	-3.6
Jogging/running	17.1	19.8	2.7
Fishing	18.8	19.7	0.9
Dance (all categories)**	16.5	11.1	-5.3
Pilates/yoga	8.7	10.6	1.9
Tramping	9.2	9.7	0.4
Golf	12.6	9.6	-2.9
Aerobics	8.2	9.2	1.0
Canoeing/kayaking	6.3	8.2	1.9
Tennis	9.0	6.5	-2.6
Football	6.8	6.4	-0.4
Snow sports	6.2	6.3	0.2
Callisthenics	6.2	6.2	0.0
Netball	6.0	6.0	0.0
Touch rugby	6.3	5.4	-0.9
Cricket	7.1	5.4	-1.7
Hunting	4.5	5.3	0.8

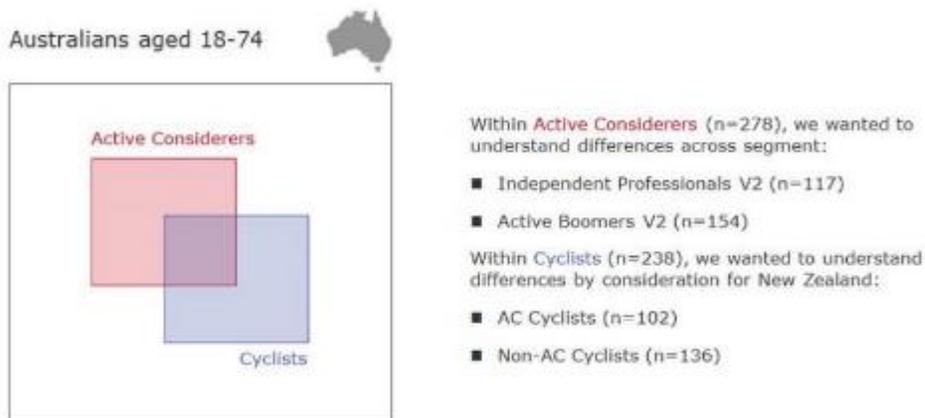
Timber Trail customer segments

Geographic Market Focus

The primary geographic market is Central and Northern North Island where most of the population resides and there is good accessibility. Wellington and the Lower North Island is close behind. All of this market is within a “tank of gas” and can do the trail in a weekend.

Australia is the primary international market opportunity with growing awareness of New Zealand’s offering, relatively easy access and market scale compared with other nationalities. This is the focus on Tourism New Zealand’s cycling and MTB marketing efforts with Leisure Cycling the primary target (1.9m potential audience) and Mountain Biking the secondary target (1.1M potential audience). The following slide illustrates overlap between TNZ’s Active Considerer market segment and the specific Cyclist market. The research indicated strong interest for the Timber Trail from people in the cyclist market who were not in the Active Considerer market. This suggests a need to focus on specialist media of interest to cyclists rather than the more general media which Active considerers may consume. With the special interest groups and pages in Facebook this is practical to achieve.

Via the Mar-16 Australia AC monitor, we spoke with two key audiences – ACs and Cyclists – and there is overlap between these two groups



Megan Gale Cycling campaign evaluation

© TNS April 2010



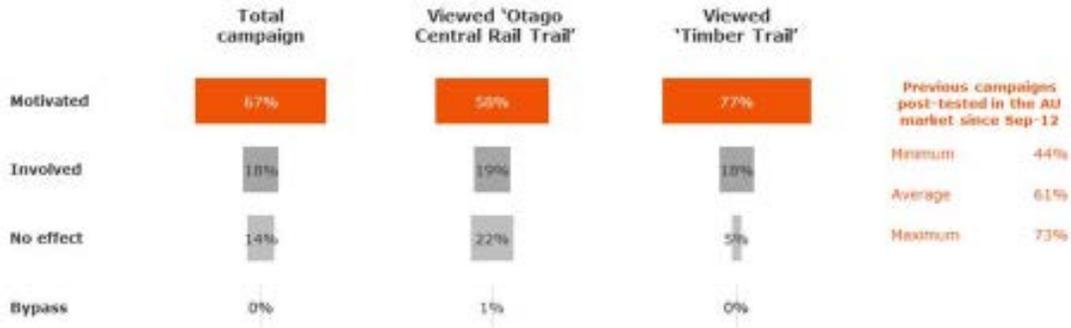
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The next slide shows the impact of a campaign promoting the Otago Central Rail Trail and The Timber Trail where the Timber Trail had the greatest effect on motivation.

Overall the campaign performs well with ACs on motivation, with those that viewed Timber Trail most impacted

Motivation (%)

Active Considerers



Sample size: Total ACs: n = 276; Viewed 'Otago Central Rail Trail': n = 128; Viewed 'Timber Trail': n = 128



Megan Gale Cycling campaign evaluation

© TNS April 2016



30

North America, UK and Europe have strong prospects for the Timber Trail however direct activity in these markets is not feasible. They can be targeted via, PR, media and trade activity and through the same on-line channels used for the NZ and Australian markets.

Rider Types

The more experienced cyclist, the Timber Trail is not suited to complete beginners or unfit riders.

Active Boomers – done Rail Trails, ready to step up. This includes motorhomers.

“Real MTBers” who normally seek out Grade 3-5 trails and have never been that interested in easy rail trails. However, the remoteness and features like the forest, swingbridges and logging tramway create epic ride appeal. These riders tend to be younger on average but there are still many 40-60+ with high levels of fitness.

Majority male, but female is growing and females are often the bookers.

Many groups – a social re-connection opportunity.

Many repeat visitors, where one person from a group returns with a new group.

Families ~14 years and over (12+ if fit and active).

Corporates – this is a potential market which can be developed as a team bonding exercise and with the new lodge, can be combined with a business meeting.

Secondary Schools and Tertiary Institutions as part of a PE and/or and Outdoors Ed programmes.

Cycling Holidays – International visitors who will incorporate several rides into their NZ itinerary, often with rental or purchased vehicles. The rentals may include bike and rack hire for the whole trip. The domestic cycling holiday market is primarily a weekend proposition but the boomers and Gen-Xers have time to take longer breaks and take advantage of quieter mid-week periods. The Timber Trail would often be combined with other Central North Island rides.

Cycle Tourers – People who take a long holiday touring most of or large parts of New Zealand and are increasingly linking through the Great Rides. This market is small but growing. They tend to be highly self-sufficient campers and therefore have low spend per day.

Walkers - this has significant growth potential with the addition of new huts. The Old Ghost Road trail in Buller already has similar walker and biker numbers. There are opportunities to promote the Timber Trail alongside Taranaki walks as additions or opportunities to avoid crowding on the Tongariro Crossing.

SWOT

Strengths

Impressive bridges, including longest rideable suspension bridge in NZ

Unique forest history, 800 year-old rainforest

The Timber Tramway and other heritage

Iwi landowners, engaged as tourism operators, providing bookable cultural experiences

Intensive pest control in the area has enabled a number of endangered bird species including Kokako, (Whio) Blue Duck, Kakariki and Kaka to thrive.

Weekendable – within a tank of gas (4-5 hour) drive from almost all North Islanders and is a 1-2 day proposition.

Positioned between Icons, Waitomo and Tongariro National Park

One of, if not the easiest rides that is truly a back-country experience

Some very capable and experienced shuttle tour operators

Solid media exposure has already been achieved, demonstrating media and customer appeal

High quality interpretation and trail marking in place

Commitment from Ruapehu and Waitomo DC's at executive and councillor level, including recent marketing budget allocation.

New Lodge due to open summer 2017

Weaknesses

Enquiries and reviews not being responded to adequately (sometimes not at all). The customer interface on-line is broken.

Fragmented representation on-line with various sites that could appear to the consumer to be official portals.

Inconsistent presentation of branding and story through websites and publications and "Timber Trail" produces many random profiles across social media.

Lack of central budget and coordinated strategic marketing to date

i-SITEs not strongly engaged or presented as a point of enquiry/booking

Lack of accommodation and other commercial tourism infrastructure on the trail.

Unsustainable funding model relying on DOC maintenance budget - Users would be willing to but are not helping to fund trail management or marketing.

All very small operators lacking serious marketing budgets with few official NZ Cycle Trail partners

Lack of export ready product packages

It is difficult for interested riders to understand the access logistics of the trail.

Some of the descriptions of the trail in media stories, websites and publications make the trail sound easier than it is which creates a safety and dissatisfaction risk.

Little or no mobile coverage increases outdoors safety risk and limits social sharing exposure.

Closest petrol station not open on weekends.

Maraeroa C easy trail is un-rideable yet still signposted and brochured.

Unsuitable as year-round experience for much of the cycling market.

Reports of some shuttle drivers not familiar with the trail, incorrect drop-offs, missed pick-ups and poor advice given to riders.

Still remote to access which limits frequent use by key urban populations (not a day trip for most).

The Grade 3 section puts off a significant segment of the cycling market.

The last hill climb accessing Blackfern Lodge has not been well communicated (expectations managed) resulting in disappointment and some negative review comment.

Opportunities

(Marketing strategies are covered separately in this plan)

Opening of the new Timber Trail Adventure lodge improves capacity and quality of experience and will result in more active marketing and travel trade networking on behalf of the trail

Growth in off-road cycling amongst all populations

Demand from large market who have done the easy rail trails and seek the next level challenge

Growth in inbound cycle tourists

Australian short breaks market

Corporate team activities

Schools and adventure tourism programmes

Social group adventure seekers, male, female and mixed.

Families with mid-teens looking for a bonding opportunity.

The shuttle short-cut and Mt Pureora uplift options can be better promoted

Demand for quality trail branded merchandise

Examples of successful trail contribution models for Queen Charlotte Track and Roxburgh/Clutha Trails.

Threats & Risks

Poor reviews putting off future customers

Increasing number of trails in NZ and overseas with some very well coordinated marketing

There remains confusion over the respective marketing roles and plans of NZCT, TNZ, RTOs and individual trails.

Weakening of economies in source markets, especially if there was an unfavourable Australian exchange rate fluctuation.

If Airlines are ever forced to pay the true carbon cost of longhaul air travel, NZ would be severely impacted by increased flight prices.

Serious injury or death incident on the trail.

Global crises, (terror threats, pandemic, financial).

Although Destination Great Lake Taupō marketing and positioning of the Timber Trail creates significant extra exposure to new customers, the risk is that Taupō based users may not spend much in the Waitomo and Ruapehu districts.

Appendix 1: Use on other Great Rides

It is hard to know how much credibility to place on the trail count data. It is likely that “Users” are actually “Uses” or trips rather than unique riders, especially for the more accessible trails near population centres where there will be numerous repeat riders. The Waikato paper states 10,000 users per annum for The Timber Trail which is at least a 67% overstatement.

Hauraki Rail Trail

20,000-170,000 users per annum / section

Waikato River Trails

Up to 35,000 users per annum

Great Lake Trail

38,000 users per annum

Tasman’s Great Taste Trail recorded 188,000 users in 2014 and 194,000 users in the 2015 calendar year. This includes walkers and commuters and totals counters on various sections so definitely not end-to-end users. It is also likely to be “movements” rather than individual users who would record more than one click on a journey. Less than 5% are through-riders.

Queenstown Trails has had 806,292 “Journeys” from October 2012 to March 2016, so on average 200,000 per annum. There were 3.59M “Movements” on the various trail counters over the same period.

Otago Central Rail Trail

The official OCRT web site notes about 100,000 riders a year, most from the North Island, including about 14,000 who complete the 152km track from Clyde to Middlemarch. The manager of Trail Journeys, one of the biggest tour operators, recently stated that the Clutha trails, along with Alps 2 Ocean and West Coast Wilderness, are having an impact on the OCRT with annual riders dropping to about 11,000 from a peak of 12,000 over the (busiest) 2009-2010 year.

Roxburgh Gorge Trail

Open four seasons since October 2013. Up to 1,200 users a week at height of this season at the Alexandra end (some of these will be short return rides from Alexandra, not completing the whole trail)

Appendix 2: Other Great Ride Trail Management, Marketing and Booking Systems

Old Ghost Rd

- Lyell Back Country Trust, charitable fundraising and built new huts on the trail.
- Runs own web site with Bookit system for huts.
- Also promoted by Tourism West Coast

Waikato River Trails

- Trust which has had council contract for Putaruru i-SITE and handles bookings. (No longer i-SITE.)
- Works closely with Hamilton & Waikato Tourism

Great Lake Trail

- Manages Craters of the Moon MTB trail park and can therefore command membership fees.
- Has had concessions to build the trails and manage concessionaires (may end)

Hauraki Rail Trail

- Trust involving councils, DOC and Iwi
- Principal Trail Operator (PTO) contract to manage trails
- Governance, commercial opportunities, Booking system to be formally reviewed.
- Once PTO shuttles profitable, other shuttle operators will be allowed on site and booking system

West Coast Wilderness Trail

- Trust involving Westland and Grey DCs and DOC
- Rail Trails NZ site still says "Official" (Paul Schramm a private operator behind this site)
- Westland DC and Trust unhappy, asked Rail Trails NZ to remove "Official" but not actioned.
- Trust has its own Wilderness Trail site where bookings shared between Hokitika and Greymouth i-SITES.
- Tourism West Coast (RTO) receives tagged funding for marketing.

Heart of Nelson (Nelson Tasman Cycle Trails Trust)

- Has a formal MoU with the RTO for marketing.
- ~100 official trail partners
- Sells virtual ownership of 1m sections of trail
- Nelson has IMBA Gold Trail Centre status, MTB club driving upgrades and gondola

Alps to Ocean

- The RTO, Tourism Waitaki owns and manages the A2O brand
- ~\$200k annual budget including full time Marketing Manager – Jason Meynard
- Broke new ground with a \$60k web site and booking system development project
- Enquiries go to Oamaru i-SITE
- Required Rail Trails NZ site for A2O-Cycle Journeys to remove the claim of "Official" site.

- 150 trail partners
- A2O goes further than the NZCT standard grading to show percentages of trail surface type for each section, with images. A variation on this would be useful for the Timber Trail.



Queenstown Trails

- Trust set up to work on land access and trail network with QLDC and DOC, well before the NZ Cycleways project. Not responsible for maintenance.
- Purchased Motutapu Challenge event as a revenue driver.
- Friends-of programmes, charitable grants, official charity for AirNZ Marathon
- Plan and book just goes to categorised operator web listings
- Full time CEO

Otago Central Rail Trail

- Otago Central Rail Trail Charitable Trust
- Claire, Marketing person 20 hours per week, + 10 hours for Roxburgh/Clutha
- Initially friction between operators and trust over marketing control
- Most bookings go to trail operators (17 are listed but about 6 are serious players).
- i-SITEs still offer objective option for itinerary development and booking.
- DOC funds \$250k p.a. while the Trust raises another \$100k for maintenance and marketing.

Motu Trails

- Trust with council and charity support
- Runs web site, maps, media etc.
- Only a handful of operator partners (2 shuttle operators)
- Opotiki i-SITE offers “bookings for no commission”

Example Cycleway Website & Booking System Budgets

At this stage a booking system is not considered urgent for the Timber Trail. There are safety issues related to the need to vet prospective riders and make sure they are capable of completing the ride.

A20

www.Alps2Ocean.com

Tourism Waitaki has invested \$60,000 over the last two years with Tomahawk. Uses Resbook-Bookeasy (Australian) booking system which covers both accommodation and activities/tours with an itinerary builder. This still has some way to go to work intuitively for customers.

Rail Trails NZ Trust

www.railtrailsnz.com

This website, the sub-trail sites and the back-end booking systems apparently have cost around \$300,000 so far (\$50,000 each of 5 trail partners then Mike Barnett + John Knight topped up).

Uses RTBS (activities) and Seekom (accomm) booking systems. Swordfox did front-end website.

Stated as ready to go over the next few weeks.

Rail Trails NZ would like to see Iwi/RTOs/Councils/Doc working together to pick this up

Benefits if the system functions as planned:

- Ability to check availability, book and pay for accomm, shuttles, bike hire, bag transfers in 1 process.
- Set commission structures to fund the trail bookings (Users pay)
- Timber Trail marketing to large database of Hauraki Rail Trail customers
- If it works, other trails likely to pick it up.

The image displays a vertical sequence of seven booking system interface panels. The top panel is a form for user details with fields for Name, Email, Gender, Height, and Age, and a 'Confirm Details' button. The second panel is 'PLAN ITINERARY' with an 'Add your First Day' button. The third panel is 'BOOK ACCOMMODATION' with two 'Add Your First Traveller' buttons. The fourth panel is 'BOOK BIKE HIRE' with two 'Add Your First Traveller' buttons. The fifth panel is 'BOOK A SHUTTLE' with two 'Add Your First Traveller' buttons. The sixth panel is 'BOOK LUGGAGE SHUTTLE' with two 'Add Your First Traveller' buttons. The seventh panel is 'BOOK VEHICLE STORAGE' with two 'Add Your First Traveller' buttons. The final panel is 'BOOKING SUMMARY' with three buttons: 'Add Your First Traveller', 'Add Your First Day', and 'Book accommodation, bike hire or another service'.

Appendix 3: Funding Model Examples

Queen Charlotte Track Land Cooperative – Track Pass

A partnership between the Department of Conservation, Marlborough District Council and private landowners.

A Queen Charlotte Track Land Cooperative (QCTLC) Pass is required for all QCTLC Land between Kenepuru Saddle, Torea Saddle, Te Mahia Saddle or Anakiwa, whether walking or biking the Queen Charlotte Track. The fee contributes to the sustainability of the track and assists with maintenance, enhancements and access. Passes can be purchased at the Picton i-SITE, selected accommodation and commercial operators in Picton and various business near the track.

Pass Fees

\$10 Single Day Pass (on private land)

\$18 5-Day Pass (to be used over consecutive days)

\$25 Seasonal Pass

School children are free

<http://www.qctrack.co.nz/track-info/qctlc-pass/>

West Coast Wilderness Trail

Trail Guide Booklet \$10

<http://www.westcoastwildernesstrail.co.nz/news/2016/01/West%20Coast%20Wilderness%20Trail%20Guide/>

Motu Trails

Friends of Motu programme \$65 for one year, or \$50 for one year without the T-shirt. (which retails for \$30)

Retail Pocket Map \$4, T-shirt \$30

A20

\$10 supporter wristbands

<http://www.alps2ocean.com/trail-supporter-wristbands>

Clutha Gold and Roxburgh Gorge Trails

T-Shirts, Caps,

<http://www.cluthagold.co.nz/passport-tags/>

Maintenance Tags (Single \$25, Family \$50)

Roxburgh Gorge and Clutha Gold Trails have been eight years in the making. They have been created by the generous support of landowners and volunteers. Volunteers will be managing these trails into the future, hence the need for riders and walkers to contribute to the on-going maintenance. It is expected that all users will contribute.

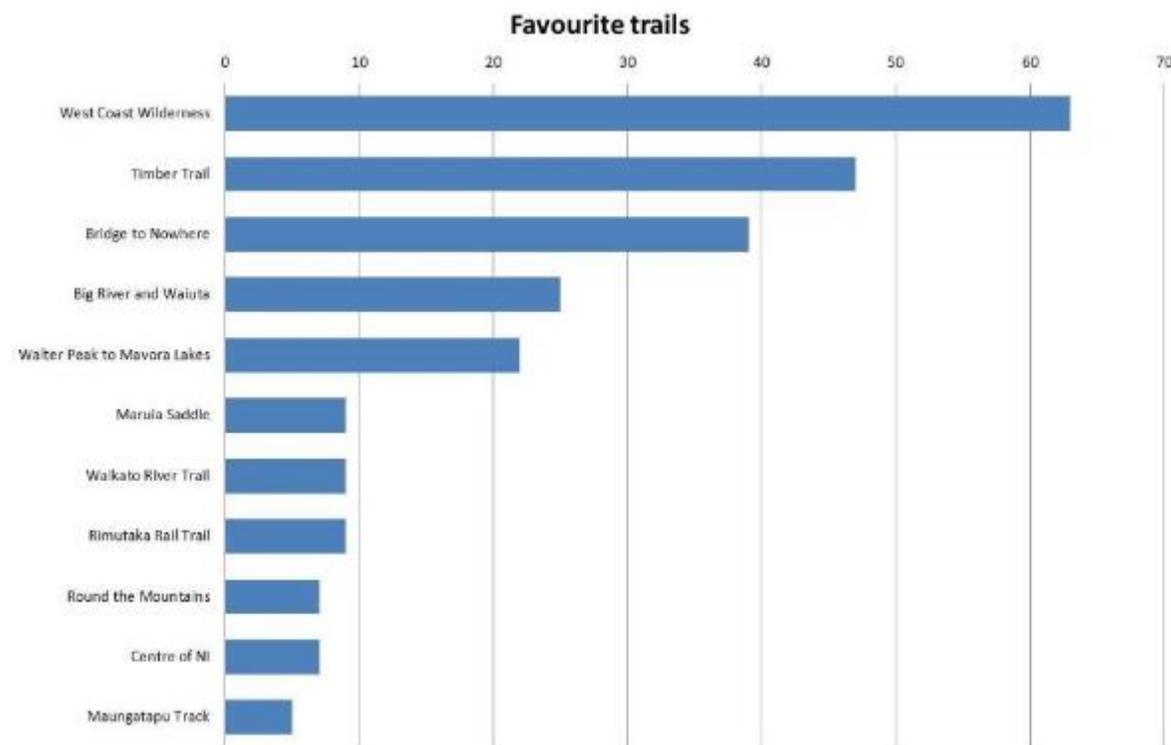
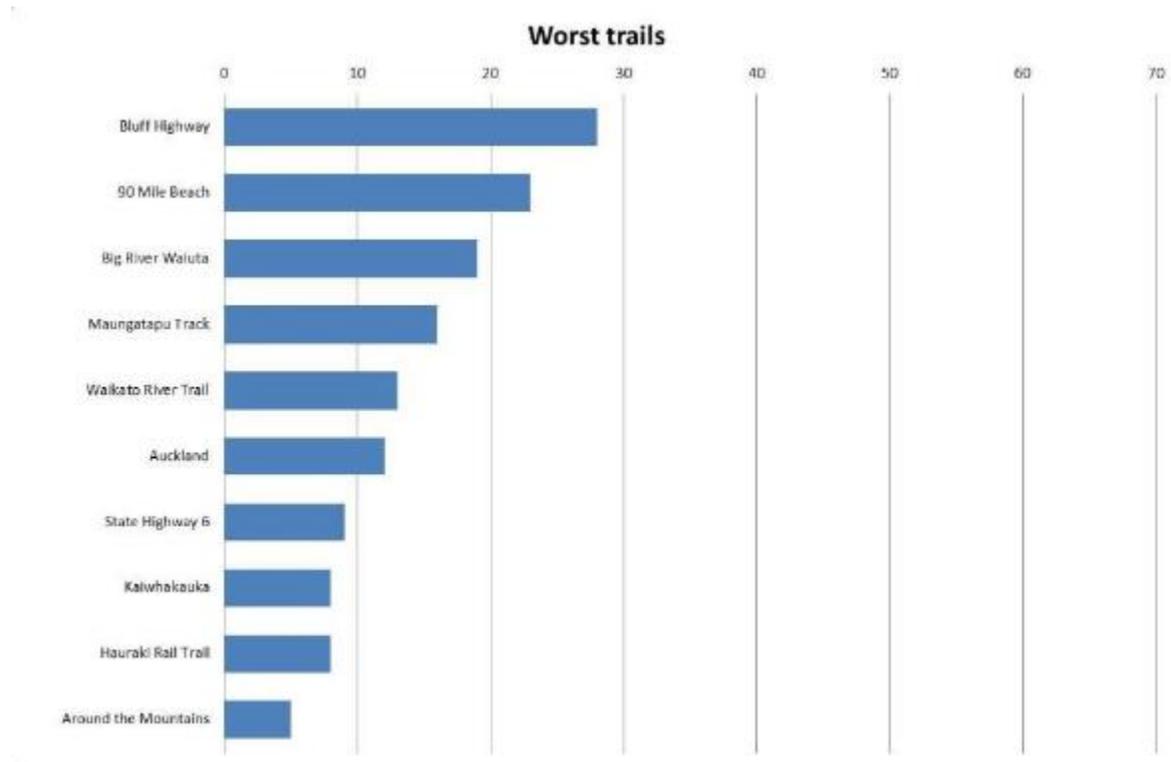
Passport (\$15)

The passport is a quality souvenir and record of your achievement on completing any section of the Roxburgh Gorge or Clutha Gold cycling and walking trails. The Passport contains maps of both trails marked with the location of interpretation panels, and features of each of the Trails. The passport is split into two sections with one half containing Roxburgh Gorge trail and the other half containing Clutha Gold Cycling and Walking Trail. Along the trail there are a series of stamp collection locations for you to collect a special rubbing stamp indicating you have passed this way. Dimensions 110 x 150mm

<http://www.cluthagold.co.nz/merchandise> (diverts to RTO shopping page)

Official Partners (9 of them). \$320 + GST per annum links to NZCT. Provides web site and wholesale rates on the Trail Tags.

Appendix 4: Tour Aotearoa Trail Ratings



Appendix 5: TripAdvisor Review examples

“Great ride but mind the weather” This is a scenic and enjoyable ride that with less than favorable weather turns into an adventure. We rode the Piropiro to Ongarue section and on a day with a bit of sunshine, plenty of drizzle and some heavy rain, it wasn't easy. We thoroughly enjoyed it but luckily as experienced cyclists (and trampers) we had the right gear. The weather forecast was a bit mixed and so it proved for us. (Reviewed 13 December 2015)

The Piropiro to Ongarue section is rated 2 (easy) but on day like ours it was more like a 3 (intermediate).

Most of the photos posted here (apart from someone in snow) are of sunny days - as on the rainy days people (like us) generally don't want to get their cameras out. The trail surface becomes boggy in places and slippery so care is needed. Of course when you're concentrating so hard on not falling you don't have much time to look at the scenery. In my opinion it's a great ride but better in fine conditions, especially for those with less experience. (Visited December 2015)

The first day of the track from Bennydale was hard work and not all that rewarding, but then we hadn't been on a bike in years. if you do a bit of biking then you probably would find it much easier.

I found it a push, 17y son found it do'able. Both very stiff after second day! Weather was forgiving: cool, with a little cloud/drizzle at the summit on the first day. Sunny and coolish on the second. Hardest part was the 6km off-track to Black Fern Lodge, which was worth getting to: great spot with waterfall a leg-stretching walk nearby; great food and service; lovely accommodation (but they're selling up ...). Their \$5pp offer to give us a lift half way back to the track avoiding the hardest bit was a real boost to the beginning of the second day. Would highly recommend Pa Harekeke to sort pre/post trail accommodation, shuttles, bag transfers, bikes etc. Very friendly, helpful and knowledgeable (avoid company that's nearer the trail - not responsive to queries and do not meet agreements).

It would be good if someone developed a more detailed guide so that cyclists can plan their stops around places of interest/beauty, rather than random rest stops.

There are places that are not for the faint hearted and some down hills that scared me so be prepared to either walk some parts or fall off.

The Piropiro to Ongarue half has better surfaces, more views and bends that tram lokeys could get round (it's mostly on the old logging tramway, with several well described relics), but there are still some muddy bits. It surprised me what steep gradients the trams could climb. The grades on the whole trail are rideable, though parts of the climb to Pureora Mountain are easier to walk. (Sep 2013)

With so much to do in New Zealand I regretted spending a day on the first leg of the Timber Trail (Pureora to Piro Piro). The climb is a good challenge, but don't expect to be rewarded with a great view at the top or sweet downhill afterwards- many off-camber corners and muddy sections ruin the flow. We took the additional effort to hike the 1km to the summit of Mt Pureora, which gives amazing 360 degree views and almost makes the first day worth it. However, due to the erosion and poor maintenance this track will take the average hiker about 1.5 hrs return. A few suspension bridges on the first leg but the ones on the second day are longer, more frequent, and give better views and information. Everything about the second day (Piro Piro to Ongarue) was better: the history of the old rail track, the scenery,

cuttings, Ongarue spiral, bridges, as well as a much less brutal gradient. We hired a tent package (including shuttle) from Pa Harakeke, who were really lovely to deal with and went out of their way to help us with our needs. Experienced MTBers should be aware most of the track could be handled by a 2WD vehicle, if it weren't for the man-made constrictions. (Visited May 2015)

Did this with the husband and a couple of friends late April 2014. We're all in our 40s and have mountain biking experience though we're probably not as fit as we'd like to be. The first day was tough with a long uphill and much mud. It would have been tough without mud - but the mud made it a killer. Probably the longest 40kms of my life. We were so worn out that only one of us decided to do the second day.

This is not a rail trail in the likeness of Otago - the first day is single track mountain biking and a lot of uphill. Go when it is dry to avoid the mud. Train.

It's a beautiful corner of the world and the birdlife is amazing.

There are a couple of "Terrible" Reviews relating to difficulty communicating and confirming shuttles with Kohia and ending up with no pick-up. No responses.

Appendix 6: Documents and Resources Reviewed

- Concept Development for Timber Trail Marketing (2015)
- Scoping and Needs Analysis – Timber Trail (Rachael Laver, Nov 2013)
- Destination Management Plan for Pureora Forest Park (July 2015), DOC, (TRC Tourism)
- Notes from Destination Management Plan Hui held April 21, 2016
- NZ’s Cycle Trail and MTB Marketing and Communications Strategy 2014-16
- Cycling and Mountain Biking Tourism Marketing Network Central North Island – Executional Business Plan (October 2014)
- Tourism Growth Partnership Funding application from Timber Trail Lodge (Truncated)
- Nelson Tasman Cycle Trail Trust Marketing Plan, 2016
- Queenstown Trails for the Future 2015-2025 (TRC Tourism)
- TNZ Research on Megan Gale Campaign (TNS)
- NZ Cycle Trails website and those of the individual trails
- Tourism New Zealand consumer web site and corporate site (Cycle Tourism Research)
- Tourism NZ Special Interest Cycling Webinar
(<http://www.tourismnewzealand.com/media/2434/special-interest-cycling-webinar-june-2016.pdf>)
- Marketing collateral, web sites and social media pages related to the Timber Trail