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People & Places

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# Economic impacts of mountain biking in production forests in New Zealand


Credit: Barekiwi

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# 1. Contents

# 2. Introduction and overview

This report assesses the economic impacts of bike tourism in New Zealand's production forests. The analysis draws on a cohort of 96 production forests which offer recreational mountain bike access.

> Production forests in New Zealand offer extraordinary mountain biking terrain and ideal conditions for purpose-built tracks. However, trail managers face the challenge of maintaining a balance between commercial operations, environmental responsibilities, and the needs of riders.

The objective of this report is to deepen understandings into how much economic activity and employment is supported within host regions by bike tourists to New Zealand's production plantation forestry estate. Bike tourists are visitors for whom the main reason to visit a destination was to ride their bike. The recreational amenity value of production forests is an important social benefit of New Zealand's plantation forests, which is often overlooked in studies that generally focus on the export value of wood.

> New Zealand's log and timber exports totalled about $6.7 billion in 2022, with this report showing that at least another $291 million was spent annually in host regions by bike tourists to New Zealand's plantation forests.

At its heart, this report helps answer the following[1]:

- How many people mountain bike in production forests throughout New Zealand?
- How much spending is brought into local economies by people visiting to mountain bike in production forests? How much employment does this spending support?
- How do the economic impacts in host regions by bike tourists to production forests compare against the economic impacts of other elements of the New Zealand bike tourism economy?
- What opportunities are there for future growth in recreational usage of production forests?

## 2.1. Key findings

- There were 600,000 mountain bikers in New Zealand plantation forests in 2022, with 335,000 of these visitors to the host region and 265,000 local riders.
- $291 million was spent by bike tourists in plantation forests in 2022, a 68% increase since 2019.
- Health benefits from local residents biking in plantation forests are worth $130 million.
- About 1,490 jobs are supported by spending in host regions by bike tourists to plantation forests.
- The top regions for production forest bike tourism are Rotorua, Auckland, Queenstown, Dunedin, and Christchurch, followed by Wanaka, Nelson Tasman, Taranaki, Taupō, and Coromandel.
- Bike tourism in plantation forests is anticipated to grow by 9.5% to $318 million within five years.

> The New Zealand results are echoed globally. Research for Deschutes National Forest in Oregon shows biking attracts US$20 million of annual visitor spend, with other types of recreational users adding a further US$60 million.

[1] Calculations have been informed by a range of government and private sources. Mountain bike usage patterns in production forests were established by scaling data from Trailforks against local insights from trail counter data and survey evidence. Trailforks is a global trail management system with almost 1.3 million rider check-ins across all types of biking in New Zealand in 2022.

# At a glance: Biking in New Zealand's production forests

**At least 96 production forests with bike access**

**Number of bikers in 2022 across New Zealand's plantation forests**

**335,000 visitors**
from outside host region

**265,000 locals**
from within host region

**600,000 bikers**
in plantation forests

**Visitor stay characteristics: 3.9 nights and $292 per day**

**Economic impacts on host regions by bike visitors to plantation forests**

**$291 million**
New spending in 2022

**68% spend lift**
Since 2019 ($173m)

**1,490 jobs**
Supported in 2022

**Top regions: Rotorua Auckland Queenstown Dunedin Christchurch**

**Potential future spending in host regions by bike visitors to plantation forests**

**9.5% growth**
in spend from 2022 to 2027

**$318 million**
total annual spend by 2027

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# 3. Current state of biking in production forests

This section introduces the cohort of production plantation forests included in the report's analysis and how much mountain bike usage currently occurs within these forests.

## 3.1. Production forests where mountain biking occurs

A cohort of 96 plantation forests that allow recreational mountain biking has been included in this report's analysis[2].

**Figure 1** – New Zealand production plantation forests with recreational mountain bike access (2022)


Plantation forests with mountain bike access are well-spread throughout New Zealand, with 44% in the South Island and 56% in the North Island.

Of these forests, around 30% are large plantation forests (over 1,500 hectares), with the remainder being small (under 1,500 hectares). A full list of all production forests included in the analysis is shown in appendix 8.1, along with the host region each is located in. Economic impacts calculated in section 4 are given at a national level and ranked across the host regions in which they occur.

[2] These forests represent a cohort where recreational mountain biking usage across 2022 could be verified from publicly available data sources; there may also be some commercial forests that will periodically allow mountain bike access which were not captured. Previous research by Scion (Getting Flow: The Place of Production Forests in the Rise of Mountain Biking) had identified as many as 115 plantation forests where bike access may be permitted, however, a closer inspection of usage patterns within Trailforks reveals 19 of these forests either had no material active usage or were no longer open for biking.

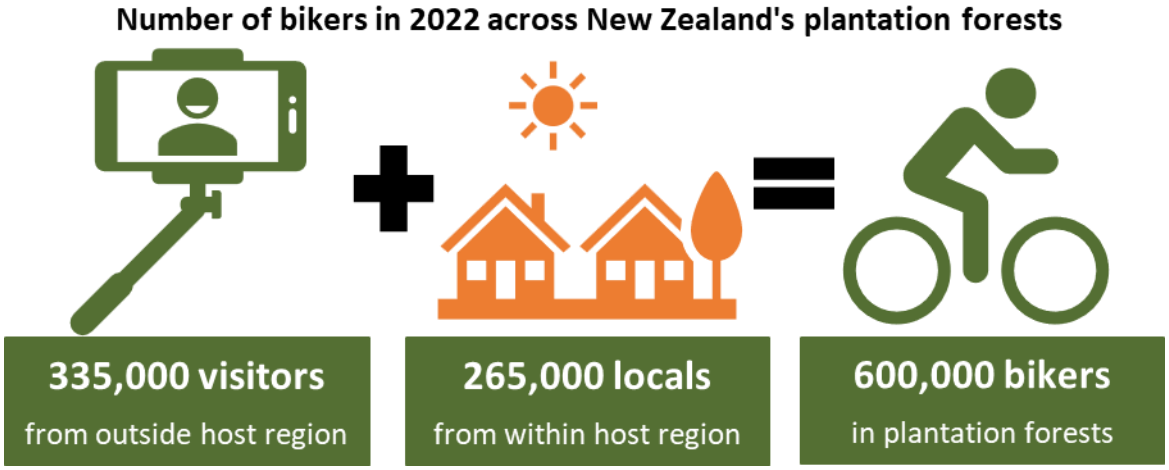
## 3.2. Who mountain bikes in production forests?

Usage of New Zealand's plantation forests for mountain biking has risen rapidly over recent years.

> The 96 production forests with recreational mountain bike access welcomed 600,000 bikers in 2022, a 25% lift on the 480,000 bikers measured in 2019.

Of these bikers in 2022, about 265,000 were local residents riding in a forest close to home, while the remaining 335,000 were visitors from outside of the host region in which the forest was located.

**Figure 2** – Number of mountain bikers across New Zealand's 96 production forests in 2022.




> Biking is the primary purpose of travel for 76% of bike visitors[3] to an area, which suggests that biking in a plantation forest was the primary motivation for travel for 255,000 of the 335,000 bikers visiting from outside host regions.

The cohort of visitors for whom biking was the primary purpose of the trip, rather than simply something they did along the way, represent a group of people who may not have travelled had it not been for recreational bike access to production forests. The next section (section 4) focusses on the economic impacts of new spending into host regions by these visitors.

Spending by locals is not captured within the core economic benefits as anything that locals spend is not new money into a local economy and represents money that could have been spent on other pastimes had it not been for biking. But the fact that 265,000 bikers in plantation forests are local residents, demonstrates that biking is clearly an important component of day-to-day life and identity for many.

Recreational cycling by locals also brings quantifiable health benefits. Waka Kotahi calculates that the health benefits of cycling are $4.90 per kilometre.

> It is estimated that cycling in New Zealand's production forests by local residents could add $130 million of mental and physical health benefits[4].

[3] This insight is calculated from data in the 2021 Evaluation of Ngā Haerenga Great Rides of New Zealand and is also consistent with a Rotorua Lakes Council 2020 survey of Whakarewarewa Forest mountain bikers.

[4] This estimate builds off the Waka Kotahi health benefit rate and the 265,000 local people who biked in production forests, coupled with evidence from Trailforks that these people rode an average of 9.4 times per year in forests for an average distance of 21.4km. It also conservatively assumed that only half the biking in production forests is exercise that would not have otherwise occurred, with the remainder being baseline exercise that would still occur in some other shape or form had the forest not been available.

# 4. Economic impacts of biking in production forests

This section introduces the economic impacts of biking in production forests. The analysis focusses on spending by bike visitors because their spend represents fresh money into the host region in which the production forest is situated that would not have existed in the absence of the bikers' visits. The potential employment supported by this spending is also estimated.

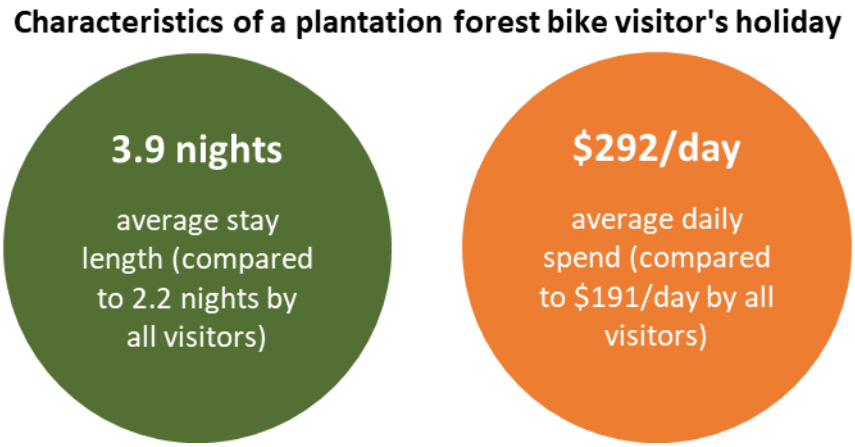
Spending by people biking in their home region is not factored into core economic impacts as it is likely they would spend their budget on other things in the local area had they not biked. But the wellbeing benefits of locals' biking must be acknowledged because it contributes to their physical and mental health – recreational use of production forests by local bikers was estimated in the previous section.

## 4.1. Characteristics of a bike visitor's holiday

The average visitor who likes to enjoy mountain biking in forests on their holiday stays for 3.9 nights in a destination and spends $292 per day.

These bike visitors stay almost twice as long and spend more than 50% extra per day compared with the typical traveller in New Zealand[5].

**Figure 3** – Stay length and daily spend by visitors who bike in production forests (author calculations)



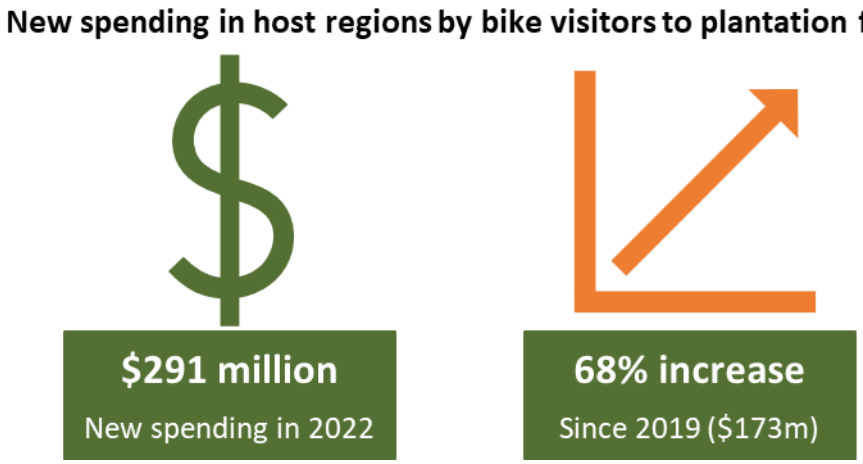


[5] Bike visitors' stay characteristics pertain to 2022. These have been calculated by the author, drawing on information from Trailforks, the 2021 Evaluation of Ngā Haerenga Great Rides of New Zealand, and inflation data. Characteristics across all visitors are based on author calculations of data drawn from the Ministry of Business, Innovation and Employment (MBIE), Statistics New Zealand, and Data Ventures.

## 4.2. Spending by bike visitors to production forests

It is estimated that bike visitors to New Zealand's production forests supported $291 million of new expenditure in host regions in 2022. This represents a 68% increase from the $173 million of new visitor expenditure that was estimated to have occurred in 2019 before the Covid-19 pandemic[6].

**Figure 4**




Biker visitors spend money not just on biking-related activities, repairs, and retail, but also on other services during their holiday (eg. accommodation, hospitality, and transport).

> Around one third of bike visitors' spending is directly on bike specific expenses, with the remainder spent on other elements of their holiday[7].

To put estimates of spending by bike visitors to production forests in perspective – total spending by visitors along the New Zealand Cycle Trail network was estimated at $951 million in 2021[8]. This means:

> Spending by bike visitors to production forests is about 30% of the level of spending associated with bike visitors to the New Zealand Cycle Trail Network.

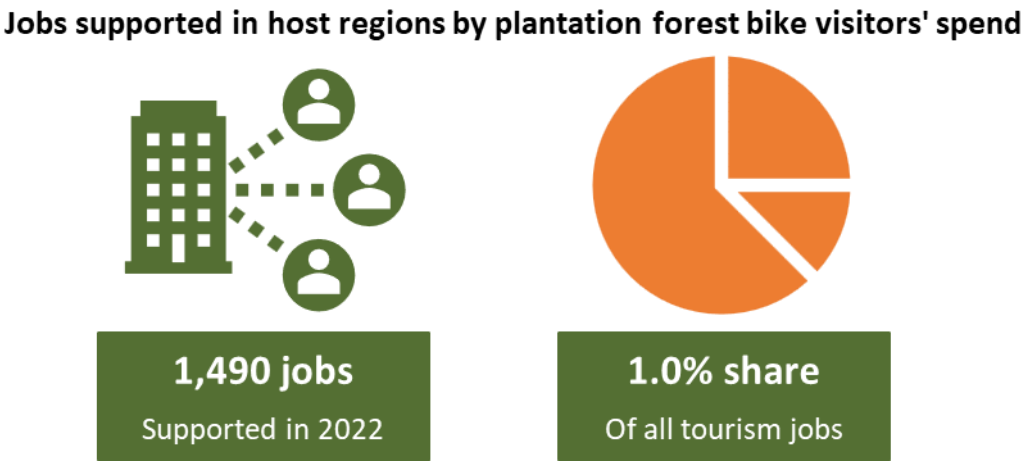
## 4.3. Jobs supported by bike visitors to production forests

New spending by bike visitors to New Zealand's production forests supports a considerable amount of employment in host regions. It is estimated that as many as 1,490 filled jobs in 2022 were supported by the spending of bike visitors to production forests during their time in host regions[9]. This represents a 63% increase on the 917 jobs supported by production forest bike visitors' spending in 2019. These calculations are based on the theoretical level of employment which could be supported by bike visitors' spending. Actual outcomes may differ depending on each business' hiring behaviour.

[6] The new expenditure supported in host regions was calculated as the total number of visitors to a region who bike in a production forest, for whom biking was the main purpose of their trip, multiplied by the average stay length and daily spend.
[7] Calculated from the Rotorua Lakes Council 2020 survey of Whakarewarewa Forest mountain bikers.
[8] Source: 2021 Evaluation of Ngā Haerenga Great Rides of New Zealand.
[9] A filled jobs estimate was formed by using a multiplier of tourism spending to jobs (calculated with inflation-adjusted data from Statistics New Zealand's Tourism Satellite Account).

Given that total tourism employment was 145,000 people in 2022, the 1,490 jobs supported in host regions by production bike visitors' spending was equivalent to approximately 1.0% of all tourism jobs.

**Figure 5**




## 4.4. In which regions do economic impacts accrue?

The economic benefits of biking in production forests are spread across New Zealand's regions. The top 10 regions are shown in the table below, while a full ranking list of all regions is available in Appendix 8.2.

**Table 1** – Ranking of top 10 regions to attract spending by bike visitors to production forests

| **Top 10 locations of new visitor spending by bikers in production forests** *Calculations by Benje Patterson, 2022* | |
|---|---|
| **Region** | **Ranking** |
| Rotorua | 1 |
| Auckland | 2 |
| Queenstown | 3 |
| Dunedin | 4 |
| Greater Christchurch | 5 |
| Wanaka | 6 |
| Nelson Tasman | 7 |
| Taranaki | 8 |
| Taupō | 9 |
| Coromandel | 10 |

Rotorua attracts the most spending by bike visitors to its production forests. New spending in Rotorua by bike visitors to the region's forests was estimated at $111 million in 2022[10]. This finding is no surprise given Rotorua's biking centrepiece is the Whakarewarewa Forest, which is conveniently accessible from downtown and offers a globally renowned trail network suitable for any ability, age, and fitness level.

[10] This estimate that $111 million of new spending in Rotorua during 2022 was associated with bike visitors who use the forest trails, compares with previous research by Benje Patterson from 2021 data that showed $103 million of new visitor spending was associated with people who came to Rotorua with the primary purpose of mountain biking anywhere in the region.

**Spotlight: Rotorua's forests**

Rotorua is globally renowned as a mountain biking destination. The International Mountain Biking Association has awarded Rotorua their most prestigious gold-level Ride Centre™ status.

Key to Rotorua's bike scene is a network of 200 kilometres of mountain bike trails within the 55,000-hectare Whakarewarewa Forest, consisting of trails to suit everyone, from beginners through to extreme downhill competitors, and for any age and fitness level. Previous research identified almost 100,000 individual mountain bikers per year in Whakarewarewa Forest.

Rotorua is home to the Crankworx festival which lures the globe's best riders to compete for world titles in downhill and trick events. The event attracts close to $5 million of spending.

Mountain biking is a key activity that attracts visitors to Rotorua:

- 33% of travellers agree Rotorua is a top bike destination.
- 54% of riders in Whakarewarewa Forest are visitors.

Visitors who bike in Rotorua's production forests were estimated in this report to attract $111 million of spending to the region in 2022. This reinforces the phenomenal benefits that previous investment into mountain biking infrastructure has made to the local economy.

Credit: Graeme Murray

Credit: Visit Bend/Rich Bacon Photography

**International spotlight: Deschutes National Forest, Oregon**

Deschutes National Forest (DNF) boasts over 2,000 miles of trails that provide some of the finest outdoor recreational opportunities in the Western United States. For mountain bikers, the nearby city of Bend is the primary focal point for exploring the area's trail network.

Calculations from research into the DNF trail network shows:

- 200,000 trail visits by mountain bikers a year, of which about 40% (80,000) were rides by visiting mountain bikers.
- Mountain bikers spend US$20 million each year on DNF trail trips out of just over US$80 million across all recreational users (including: hike, horse, snow, motor-based).

As recreational interest in the Pacific Northwest's national forests grows, the funds needed to operate and maintain the trail infrastructure are in decline, as timber revenues stay below historical levels.

An encouraging development is the emergence of local efforts to protect and preserve these forests, exemplified by initiatives like the Deschutes Trails Coalition's innovative "$1 for Trails" program.

# 5. Future growth opportunities

The previous sections of this report identified the current contribution of mountain biking in production forests to the New Zealand economy. But with recreational demand to use forests rising, and investment in developing and maintaining the trail network lifting, there are opportunities for future growth.

## 5.1. Economic impacts of a potential scenario for growth

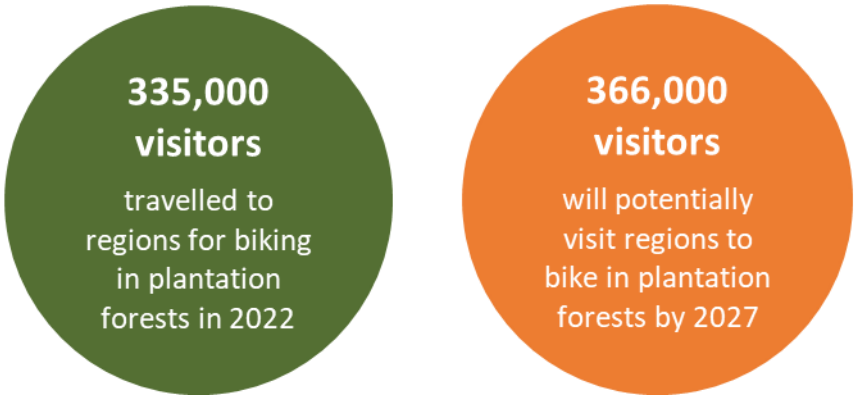
Future analysis has been based on the following five-year scenario for growth to 2027:

- Biking in production forests by local residents rise in line with population growth trends[11].
- Participation in biking in production forests by travellers on holidays rises by about 20%[12].

Under the future growth scenario, the total number of people biking in production forests could rise from 600,000 in 2022 to 658,000 in 2027. Most of this growth is visitors who mountain bike (from 335,000 to 366,000), however, the number of locals who bike will also rise rapidly (from 265,000 to 292,000).

**Figure 6**

**Future visitation to regions for biking in plantation forests**




If spending by mountain biking holidaymakers continues to follow a similar pattern to the present day, then the increase in bike visitors estimated above would push total spending in host regions by bikers in production forests up by $28 million (9.5%) from $291 million in 2022 to $318 million by 2027.

**Figure 7**

**Potential future spending in host regions by bike visitors to plantation forests**


[11] Statistics New Zealand projects median population growth of 4.0% over a five-year period from 2023.
[12] Such growth is reasonable given an increasing array of bike-focussed travel products and evidence in some places of already high levels of visitor bike participation. Previous research by Benje Patterson showed 8% of international travellers to New Zealand biked, while in markets like Queenstown 12% of travellers bike.

# 6. How can these opportunities be realised?

Realising future growth opportunities for mountain biking in New Zealand's production forests requires delivering unique and exciting experiences. Locals and tourists alike have limited time and resources, and so will be weighing up the choice to bike against a variety of other recreational or touristic activities.

To create successful bike experiences, it is important to appeal to the tastes and preferences of the bike market. At a high-level appealing to bikers' demands requires offering:

- Great scenery and opportunities for photos.
- A variety of trails to avoid boredom, challenge those who seek it and encourage repeat visitation.
- Ease of access and hassle-free experiences, supported by services, information, and signage.
- Supporting experiences that cater to different interests such as history, arts and culture, sightseeing, and other activities, particularly on wet days or simply to round out the visitor experience.
- Food and beverage options to keep visitors fuelled and to provide opportunities to celebrate the social side of biking culture.

For regions with a production forestry estate where they are seeking to encourage more recreational biking and bike tourism, the following key factors can help ensure success:

1. **Develop partnerships with local forestry companies:** Establishing partnerships with owners of production forests can provide access to the land and resources necessary to build bike trails and develop infrastructure.
2. **Engage local communities:** Activating the existing local riding community is important for ensuring trail offerings hit the spot, and helps with ongoing support for maintenance and development of trails, as well as for leading fundraising initiatives.
3. **Establish a governance model:** This helps provide strategic direction, and ensure consistency of marketing and user experiences. The governance model should define roles and responsibilities for stakeholders and enable sustainable external funding sources to be developed.
4. **Conduct feasibility studies:** Before investing in the trail development, conduct feasibility studies to assess the potential market and the economic impact of the proposed project.
5. **Build high-quality bike trails:** Constructing high-quality bike trails that offer a range of difficulty levels and unique features can attract a wide range of visitors. Trails should be designed with safety in mind and provide clear signage to guide visitors through the forest.
6. **Develop infrastructure and amenities:** In addition to bike trails, infrastructure and amenities such as parking areas, toilets, and picnic areas can enhance the visitor experience and make the forest more accessible to a wider range of visitors.
7. **Promote the forest as a destination:** Marketing and promoting the production forests as a destination for bike tourism can attract visitors from both within New Zealand and overseas. This can be done through advertising campaigns, and working with travel agents and tour operators.
8. **Leverage events:** Bike events are an important tool for supporting growth in bike tourism. Destinations should focus on events that celebrate bike experiences that are intrinsically linked to the destination, as well as those that can support year-round visitation.
9. **Foster sustainable practices:** As the popularity of bike tourism grows, it is important to promote sustainable practices that protect the forest and ensure its long-term viability. This can include working with visitors to reduce their impact on the forest, promoting responsible trail use, and using eco-friendly practices in the development of infrastructure and amenities. Forest owners harvesting plans may also need to evolve to meet recreational access needs.

# 7. Concluding remarks

The traditional view of plantation forestry in New Zealand is that its benefits are solely delivered through the revenues from logging and timber production. However, this report has highlighted that there are also significant social benefits of recreational access to New Zealand's production plantation forestry estate.

There are at least 96 plantation forests scattered throughout the country which currently have measurable recreational mountain bike usage. Collectively these forests welcomed 600,000 bikers in 2022. These bikers were a mix of locals and visitors to the host region.

The economic benefit of the bike tourists to the plantation forests was around $291 million of additional visitor spend within the host region that would not have otherwise occurred without biking being permitted within local production forests. On top of these economic benefits, there are also health benefits to local residents from increased exercise, these health benefits were in the order of $130 million over the past 12 months.

Over the next five years, there is an opportunity for mountain biking in plantation forests to grow by about 9.5%, which would take total spending by bike tourists in the forests to around $318 million across host regions.

To realise these opportunities will require delivering unique and exciting biking experiences. To create such experiences, trail managers need to focus not only on building high-quality trails and associated infrastructure, but also developing strong partnerships with local forestry companies and solid governance models. The marketing side of a trails network is also important not to neglect, with destination promotion and leveraging off the profile of key events also helpful. And finally, trail managers and forestry owners need to focus on sustainable practices that protect the forest and ensure its long-term viability for recreational access.


Credit: Miles Holden

# 8. Appendix

This appendix contains tables that:

- List production forests where mountain biking is allowed that have been included in the analysis.
- Rank regions by who attracts the most bike visitor spending to production forests in their area.

## 8.1. List of production forests included in the analysis

The following table provides a stocktake of all large production forests, over 1,500 hectares in size, with current recreational mountain bike access that have been included in the report analysis. The next page has a similar table for production forests which are below 1,500 hectares in size.

**Table 2** – Large production forests (>1,500ha) with recreational mountain bike access

| **Large production forests (>1,500ha) with current recreational mountain bike use** *Author stocktake drawing on insights from Trailforks and Scion (as at 2022)* | |
|---|---|
| **Forest** | **Region** |
| Akatarawa (Kapiti Coast) | Wellington |
| Ashley/Okuku | Greater Christchurch |
| Dalethorpe | Greater Christchurch |
| Glenbervie | Northland |
| Golden Downs/Moutere Hills | Nelson Tasman |
| Hanmer | Hurunui |
| Harakeke | Whanganui |
| Herbert | Waitaki |
| Karioi | Waikato |
| Kinleith | Waikato |
| Kohitere | Manawatū |
| Lismore (Geraldine Downs) | Timaru |
| Mahinapua | West Coast |
| Meremere | Auckland |
| Naseby | Central Otago |
| Richmond Hills | Nelson Tasman |
| Riverhead | Auckland |
| Silverpeaks | Dunedin |
| Tairua | Coromandel |
| Tangoio (Pan Pac) | Hawke's Bay |
| Waimate | Waitaki |
| Waipori | Dunedin |
| Waipū | Northland |
| Waitangi | Northland |
| West Dome | Auckland |
| Whakarewarewa | Rotorua |
| Whangapoua | Coromandel |
| Woodhill | Auckland |

**Table 3** – Small production forests (<1,500ha) with recreational mountain bike access

| **Small production forests (<1,500ha) with recreational mountain bike use**<br>*Author stocktake drawing on insights from Trailforks and Scion (as at 2022)* | |
|---|---|
| **Forest** | **Region** |
| Arapuke | Manawatū |
| Battle Hill Farm Forest Park | Wellington |
| Ben Lomond Forest | Queenstown |
| Bethune's Gully/Forrester Park | Dunedin |
| Blue Spur Forest | West Coast |
| Bottle Lake Forest | Greater Christchurch |
| Busing Forest | Taranaki |
| Cable Bay Adventure Park | Nelson Tasman |
| Carterton Mountain Bike Park | Wairarapa |
| Centennial Park | Timaru |
| Christchurch Adventure Park | Greater Christchurch |
| Colson road | Greater Christchurch |
| Fourforty | Auckland |
| Tukituki | Hawke's Bay |
| Haven | Greater Christchurch |
| Hotoritori, Coromandel Forest Park | Coromandel |
| Hylton Park | Whanganui |
| Kaiteriteri | Nelson Tasman |
| Kaitoke | Wellington |
| Kauri Coast | Northland |
| Kingsland/Silvan Forest | Nelson Tasman |
| Lismore Forest | Whanganui |
| Living Springs | Greater Christchurch |
| Mangamahoe Forest | Taranaki |
| Mangarehu Forest | Coromandel |
| Maraetai | Auckland |
| Matipo Park | Whanganui |
| Mcleans Island Forest | Greater Christchurch |
| Mt Hutt | Greater Christchurch |
| Mt Thompson | Wellington |
| Onepu | Bay of Plenty |
| Onerahi Forest | Northland |
| Oropi Grove | Bay of Plenty |
| Pakuratahi Forest/Tunnel Gully | Wellington |
| Parihaka | Northland |
| Pegasus Bay (Waimakariri River) | Greater Christchurch |
| Pirongia Forest | Waikato |
| Rabbit Island | Nelson Tasman |
| Raincliff Forest | Timaru |
| Rangituhi Trail Park | Wellington |

| | |
|---|---|
| Ranui Farm Park | Hawke's Bay |
| Redwoods/Waikari Creek | Dunedin |
| Renwick/Condors Bend | Marlborough |
| Richmond Hills/Barnicoat | Nelson Tasman |
| Rivenrock | Wairarapa |
| Sandy Point | Southland |
| Signal Hill | Dunedin |
| Spicer Forest | Wellington |
| Sticky Forest | Wanaka |
| Summerhill Farm | Bay of Plenty |
| Taylor Pass Forest | Marlborough |
| Te Miro | Waikato |
| TECT Park | Rotorua |
| Tekapo Reserve | Mackenzie |
| The Gorge | Nelson Tasman |
| Totara Park | Wellington |
| Waiarakei Forest (Craters of the Moon) | Taupō |
| Waikakaho Forest | Marlborough |
| Waikereru Forest (Millmore) | Gisborne |
| Waikune Forest (Uenuku Pines) | Ruapehu |
| Wairoa | Hawke's Bay |
| Whagamata Forest/Whangapoua | Coromandel |
| Whare Flat | Dunedin |
| WhaTaupōko | Gisborne |
| Whitehills Forest | Northland |
| Whitianga | Coromandel |
| Wither Hills | Marlborough |
| Worsley Forest | Greater Christchurch |


Credit: Destination Queenstown

## 8.2. Regional ranking of which regions attract the most spend

This following table gives the full ranking list of which regions attract the most spending by bike visitors to production forests in their local area.

**Table 4**

| **Full ranking of all regions of new visitor spending by bikers in production forests** *Calculations by Benje Patterson, 2022* | |
|---|---|
| **Region** | **Ranking** |
| Rotorua | 1 |
| Auckland | 2 |
| Queenstown | 3 |
| Dunedin | 4 |
| Greater Christchurch | 5 |
| Wanaka | 6 |
| Nelson Tasman | 7 |
| Taranaki | 8 |
| Taupō | 9 |
| Coromandel | 10 |
| Bay of Plenty | 11 |
| Waikato | 12 |
| Manawatū | 13 |
| Hawke's Bay | 14 |
| Northland | 15 |
| Marlborough | 16 |
| Central Otago | 17 |
| West Coast | 18 |
| Wellington | 19 |
| Timaru | 20 |
| Southland | 21 |
| Waitaki | 22 |
| Gisborne | 23 |
| Whanganui | 24 |
| Hurunui | 25 |
| Wairarapa | 26 |
| Mackenzie | 27 |
| Ruapehu | 28 |

As identified earlier in Section 4.4, Rotorua's forests attract about $111 million of bike visitor spend. The remainder of the top five regions to attract spending by bike visitors to their production forests are Auckland, Queenstown, Dunedin, and Greater Christchurch. New spending across these four regions totals $80 million. Looking further down the list of regions to those occupying positions six to 10, a total of $55 million of new spending is associated with bike visitors to production forests in Wanaka, Nelson-Tasman, Taranaki, Taupō, and Coromandel. The remaining 18 regions' forests collectively attract a further $45 million of bike visitor spend between them.

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