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Outdoor Access and the policy system

Final Report: How outdoor public access enables government objectives the Crown does not yet recognise

Client: Herenga ā Nuku Aotearoa, the Outdoor Access Commission

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Executive summary

Heuser|Whittington prepared this report for Herenga ā Nuku Aotearoa, the Outdoor Access Commission. The report sets out the evidence base for outdoor public access, illustrates that evidence through two New Zealand case studies, and maps how nineteen government agencies treat outdoor access in their strategic documents. The primary audience is central government officials and Ministers.

The Commission wants a reference document it can use in budget processes, strategy reviews, and cross-agency conversations, to show that outdoor access already enables objectives agencies are pursuing.

Our analysis found the following:

Global and New Zealand evidence shows clear benefits from outdoor access[1]

International and New Zealand research consistently show that outdoor access delivers large benefits in health, economic contribution, social cohesion, and care for the environment. The benefit is dual. Outdoor access is generative (economic contribution earned by regional communities) and preventative (health, social and welfare costs avoided).

The United Kingdom, Scotland, and Australia have all published valuations that run into the billions. In New Zealand, Sport NZ estimates a social return of $2.12 for every $1 invested in active recreation. The Ministry for Culture and Heritage values the sport and recreation sector at $8 billion of GDP and 72,777 jobs. Physical inactivity costs the country around $2.3 billion per year in lost production and $530 million in direct health system cost. This means more active families, fewer cases of diabetes, better mental health outcomes, and regional employment.

Case studies (Kawatiri Trail and biking in production forests) demonstrate a clear economic benefit from the Commission's role in improving outdoor access

Two case studies show what this looks like in practice:

- The Kawatiri Coastal Trail is a forty-kilometre walking and cycling trail on the West Coast that opened fully in March 2025. In its first full operating year, the trail recorded 32,000 users and approximately $18 million of visitor spending in the Buller District. That visitor spending matches the full 12-year economic benefit projected for the trail in 2021, delivered inside 12 months of full operation.
- Mountain biking in production forests takes the same logic to a larger scale. Ninety-six plantation forests hosted six hundred thousand riders and $291 million in new visitor spending in 2022, supporting around 1,490 jobs across regional host economies. The production forest case uses 2022 actuals rather than projections.

[1] This report focusses on the economic case because the audience is central government policy makers. That case is complemented throughout by evidence on health, identity, and wellbeing, which are the values the economic numbers ultimately serve.

Both case studies show the Commission's core function. The Commission does cross-boundary stewardship. It assembles the agreements, easements, and relationships that convert land into public access. Commission easements, legal advice, and grant funding enabled Kawatiri on a mixed public and private corridor. Ninety-six separate sets of voluntary permissions between forest owners and trail groups keep the production forest model in place. Neither case would generate value without the access layer.

Many New Zealand government agencies under-recognise the contribution of outdoor access

The agency mapping examined nineteen government agencies. For each, it compared the agency's operational reality (its funded programmes, statutory functions, and Annual Report case studies) with its strategic narrative (its Statement of Intent, headline strategy, and accountability documents to Ministers). The benchmark was the agency's own documented activity.

Four agencies explicitly name outdoor access in their core strategic documents: DOC, Sport NZ, LINZ, and Herenga ā Nuku itself. One agency is mixed. The Ministry of Education recognises outdoor access through its curriculum and Education Outside the Classroom Guidelines, while its Statement of Intent and Annual Report are silent on it. Ten agencies have implicit recognition, where operational work touches outdoor access but the strategic narrative does not name it. Three agencies have weak implicit recognition. Two agencies have no recognition across statute, strategy, and Statement of Intent.

Seven thematic patterns appear across the nineteen agencies. Health agencies prescribe outdoor activity but do not invest in the places where it happens. Tourism and international-representation agencies monetise outdoor imagery abroad, yet their own strategies do not steward the domestic network. Trail networks generate measurable returns, but sit across four agency silos with no single strategic home. Urban densification is reshaping where New Zealanders can walk and cycle, yet housing and transport agencies do not identify public outdoor access as a tool for managing that shift. Māori access to whenua has no institutional home outside the Commission, despite operational recognition in Treaty settlements and in TPK's landlocked-whenua work. The school curriculum depends on outdoor access for a named learning area, while the Ministry of Education's reporting line to Ministers is silent on it. Crown valuation tools already monetise outdoor access case by case, but no agency aggregates the result into a strategic investment signal.

The common finding is a visibility gap. Agencies do work that depends on outdoor access. Their strategic narratives do not always reflect that work. So the contribution of outdoor access does not reliably surface in the documents that shape budgets, accountability, and investment.

The Commission has opportunities to improve partnerships and improve recognition

The Commission has a distinctive role in closing this gap. Under the Walking Access Act 2008, the Commission is the only agency whose remit spans all land types and landowner categories, and the only agency that names outdoor public access as its core function. The partnerships where the Commission has the strongest mutual case are those where operational engagement is high and strategic recognition is low: Sport NZ, Health NZ, MBIE (tourism and regional infrastructure), and Te

Waihanga. In each, the evidence exists, the Commission has the cross-boundary standing to broker a conversation, and the recognition gap can be closed through existing instruments. The Commission could also lead a National Strategy for Outdoor Public Access as a mechanism to lift visibility across agencies and coordinate delivery of the benefits this report has identified.

1 Introduction

Outdoor access means the ability of the public to reach and use outdoor places for recreation, health, and connection with the natural environment. In New Zealand, the Walking Access Act 2008 defines the standard: access should be free, certain, enduring, and practical (s3).

The Outdoor Access Commission (Herenga ā Nuku Aotearoa) was established under this Act to provide that access. The Commission works across all land types: public conservation land, Crown pastoral land, private farmland, forestry land, and urban margins. It creates durable legal access through easements, provides advisory support to communities and landowners, and administers grants for access projects. No other agency has the mandate or capability to work across all these land types.

Outdoor access is effectively infrastructure that supports outcomes across health, tourism, transport, community development, and environmental stewardship. Walking is the most popular physical activity in New Zealand (57% of adults walk for exercise in any given week). The trails, tracks, and access routes that make walking possible are as fundamental to public health outcomes as the health resources treat the consequences of inactivity.

1.1 The key questions

This report asks two questions:

- What is the value of outdoor access, based on the best available international and New Zealand evidence?
- How well do New Zealand government agencies recognise that value in their legislation, strategies, and priorities?

The answers matter for the Commission's policy positioning. If outdoor access supports objectives across multiple agencies but is not recognised, then the Commission has a strategic opportunity to build cross-agency partnerships that leverage its unique capability.

1.2 Structure of this report

The report is organised in four parts:

- Section 2 synthesises global and New Zealand evidence on health, economic and social benefits of outdoor access
- Section 3 has two New Zealand case studies showing how outdoor access and the Commission’s role creates value in practice:
    - Kawatiri Coastal Trail
    - Mountain biking in production forests.
- Section 4 reviews how New Zealand agencies reflect the benefits of outdoor access in their functions, showing that many under-recognise the benefits of outdoor access.
- Section 5 summarises the strategic implications for the Commission and recommends next steps.

The full evidence source inventory, and methodological notes are in the appendices.

2 Global evidence confirms outdoor access delivers large health, economic, and social benefits

We reviewed evidence from government agencies and independent researchers in the United Kingdom, England and Wales, Scotland, and Australia, alongside New Zealand evidence, to summarise the key findings on outdoor access and outcomes.

The evidence base is large. It draws on national ecosystem accounting, population surveys, social return on investment analyses, trail network evaluations, and economic impact studies. The methodologies differ across jurisdictions, but the findings are consistent: outdoor access generates large, measurable returns across every dimension examined.

Table 2.1: Cross-country comparison of benefits of outdoor access

Metric	UK[2]	Scotland	Australia	New Zealand
Annual economic value	GBP 22bn	GBP 1.9bn (trail network)	A$10-11bn	NZ$8.0bn (1.9% GDP)
Social value	GBP 46.8bn	GBP 2.0bn cultural ecosystem services	A$55bn total sport value (includes professional sport)	NZ$21bn ($4bn economic + $17bn social)
Health benefits (annual)	GBP 7.9bn	GBP 0.7bn	A$2.4bn health system cost of inactivity	NZ$9.0bn health outcomes
Cost of physical inactivity	GBP 5bn NHS savings foregone	GBP 94m/year	A$2.4bn health system (AIHW)	NZ$2.3bn lost production; NZ$530m health system
Employment supported	1 million jobs	66,500 FTE	128,000 FTE	72,777 filled jobs
Weekly participation rate	68% (England, PaNS Year 5)	61% (SPANS, new methodology)	Not reported	74%
Trail/network ROI	Not reported	GBP 8 per GBP 1 (health walks)	A$5 per A$1 (cycling)	NZ$10-35 per $1 (cycling)
Nature-based tourism	GBP 5.5bn (national parks)	GBP 1.4bn (40% of tourism)	Not reported	NZ$3.4bn from conservation land

Note: Sources for this data are set out in the following paragraphs

Published estimates of New Zealand's sport and recreation sector suggest it contributes a higher share of GDP (1.9%) than any of the comparator jurisdictions. Employment in the sector is also growing faster than the total economy (4.2% versus 2.2%, MCH 2024). These figures provide a strong starting point for the Commission's advocacy, but they understate the full picture because

[2] Some of the UK statistics include Scotland, some do not. We have a dedicated column and section 2.2 for Scotland. The totals in the UK and Scotland column should not be added together to produce a UK total.

they measure market economic activity only. The health, social, and environmental benefits sit on top. The impact on people translates from these dollar figures into real effects on participation in outdoor activity and reduced disease burden.

2.1 United Kingdom (England and Wales)[3]

The United Kingdom has the most developed evidence base on the value of outdoor recreation. The England and Wales evidence demonstrates that government statistical agencies can and do produce credible monetary valuations of outdoor recreation benefits. It also shows that outdoor recreation is a major sector of the economy, given the scale of the figures.

Four work programmes in England and Wales stand out. The first three are national agencies' work, the fourth is from a member organisation:

- The Office for National Statistics' annual Natural Capital Accounts include a specific estimate of health benefits from recreation.[4] The 2025 accounts value health benefits at GBP 7.9 billion per year, based on 19.9 million people gaining measurable health improvements from outdoor recreation. The methodology uses quality-adjusted life years (QALYs) valued at GBP 12,936 each. These statistics include Scotland (see section 2.2 for discussion of Scotland-specific outcomes)
- Department for Environment, Food and Rural Affairs (Defra) has an Outdoor Recreation Valuation Tool (ORVal), developed by the University of Exeter.[5] This tool estimates the welfare value of greenspace recreation across 138,617 mapped sites in England and Wales. It finds GBP 25.6 billion per year in welfare value. This measures what people would be willing to pay over and above what they actually spend to access these sites.
- The most recent People and Nature Survey (PaNS) results from Natural England (an executive non-departmental public body of Defra) [6] finds that 68% of adults had visited a green or natural space in the previous 14 days. Around nine in ten visitors (89-92% across survey years) agree that nature visits benefit their mental health. Walking remains the dominant activity, accounting for approximately 70-76% of all greenspace visits.
- Reconomics 3.0, published in January 2026 by the Sport and Recreation Alliance and Leeds Beckett University,[7] provides the most current UK-wide (ie, including Scotland) economic picture. It estimates that sport and recreation generates GBP 46.8 billion in total social value, of which outdoor recreation accounts for GBP 22 billion in economic value, GBP 46.8 billion in social value, and supports one million jobs. National parks alone generate GBP 5.5 billion in economic value. The report also estimates that outdoor recreation saves the NHS over GBP 5 billion per year in avoided treatment costs.

[3] In some cases the UK statistics also include Scotland. We have a separate section for Scotland in 2.2.
[4] Office for National Statistics. (2025). UK natural capital accounts. ONS.
[5] University of Exeter & Department for Environment, Food and Rural Affairs. (2018). Outdoor Recreation Valuation Tool (ORVal). https://www.leep.exeter.ac.uk/orval/
[6] Natural England. (2025). People and Nature Survey for England: Year 5 annual report (April 2024 -- March 2025). Natural England.
[7] Sport and Recreation Alliance & Leeds Beckett University. (2026). Reconomics 3.0: The economic, health and social value of sport and recreation to the UK. Sport and Recreation Alliance.

2.2 Scotland

Scotland is the closest international comparator to New Zealand for outdoor access policy. The two countries share a similar population (5.5 million versus 5.2 million), a culture of outdoor recreation in natural settings, and an institutional framework in which a dedicated public body (NatureScot in Scotland, Herenga ā Nuku, the Outdoor Access Commission in New Zealand) stewards access to the outdoors.

Scotland's Land Reform (Scotland) Act 2003 established a statutory right of responsible access to most land and inland water. This was a relevant international precedent for New Zealand's Walking Access Act 2008, noting that statutory access rights in New Zealand are different. The Commission's approach under the Walking Access Act 2008 deliberately avoids the full statutory-access model and works instead through negotiated easements and voluntary agreements. The value of the Scottish statutory access right for this report is as evidence of what institutional investment in access delivers over two decades, not as a template for land-use reform. Scotland's access right has translated into measurable economic and health outcomes over time, higher participation, trail network returns, and tourism income.

The Scotland evidence shows a clear link between statutory enshrinement and positive economic and wellbeing outcomes:

- Outdoor recreation participation in Scotland has grown substantially since the Act came into force. Under consistent survey methodology, weekly participation rose from 42% in 2012 to 61% by 2023/24.[8] The most recent Scotland's People and Nature Survey (SPANS 2023/24), which used a new online methodology, recorded 61% weekly participation, though NatureScot cautions against direct comparison with the earlier face-to-face surveys.
- Scotland's National Walking and Cycling Network (NWCN) is managed by NatureScot. Its 2019 evaluation provides trail-specific economic evidence. The network generates GBP 1.9 billion in local spending and supports 27,500 jobs. It displaces 19.5 million car journeys per year, saving 7.1 million kilograms of CO2 emissions. Among users, 93% say the network boosts their overall life satisfaction.[9]
- NatureScot also found strong links between access to the natural environment and tourism spending.[10] Nature-based tourism accounts for approximately 40% of all tourism spending in Scotland, worth GBP 1.4 billion per year and supporting 39,000 full-time equivalent jobs.
- The Scottish Natural Capital Accounts (2023) value cultural ecosystem services, including recreation, tourism, and the health benefits of outdoor activity, at GBP 2.0 billion per year. Health benefits from recreation account for GBP 717 million of this total.
- Physical inactivity costs the Scottish NHS GBP 94 million per year and is associated with approximately 3,185 deaths annually and 11,474 disability-adjusted life years (Public Health Scotland, 2024) (Scottish Health Survey). A 2024 Public Health Scotland report updated the burden-of-disease estimate to 3,185 deaths and 11,474 disability-adjusted life years.

[8] NatureScot. (2024). Scotland's People and Nature Survey 2023/24. NatureScot.
[9] Sustrans Scotland. (2019). National Walking and Cycling Network evaluation. Scottish Government / Sustrans.
[10] NatureScot. (2010). The economic impact of wildlife tourism in Scotland (Commissioned Report No. 398). NatureScot.

2.3 Australia

Australia's evidence base is structured differently from the UK's. There are no national natural capital accounts that value recreation, and no equivalent of ORVal. The strongest evidence comes from a national sport valuation study, a nature-based recreation economic assessment, and state-level parks valuations:

- Marsden Jacob Associates estimated the economic contribution of nature-based outdoor recreation at A$10-11 billion in GDP (slightly less than 1% of total GDP), with total national expenditure of A$20 billion per year (2018). The study also estimated A$265 million in avoided healthcare costs from outdoor recreation. These figures are more conservative than the BCG sport valuation because they cover nature-based recreation specifically, not all sport and recreation.
- The Boston Consulting Group's (BCG) Intergenerational Review of Australian Sport (2017), commissioned by the Australian Sports Commission, is a comprehensive national assessment. It found that sport creates A$55 billion in total value for Australia each year, with at least A$7 returned for every A$1 spent in the sector. The Australian sports industry supports 128,000 full-time equivalent jobs, around 1.5% of the workforce. However, Australian sport spending includes professional sport and organised competition; outdoor recreation is a subset.
- The Australian Institute of Health and Welfare estimated that diseases caused by physical inactivity cost the Australian health system A$2.4 billion in 2018-19, with A$1.7 billion from the direct effects of inactivity. The Australian Burden of Disease Study (2023) found that physical inactivity is responsible for 2.6% of total disease burden, including 19% of the diabetes burden, 16% of bowel cancer, and 14% of dementia.
- AusPlay (Australia's equivalent of Active NZ) survey from 2024 confirms the same participation pattern seen in other jurisdictions. Walking is the most popular physical activity. Informal, unstructured outdoor activities (walking, bush walking, running) are more popular than organised sport for both men and women.

State-level evidence supports the national-level evidential findings. Parks Victoria estimated that park visitors spend A$1.4 billion per year in the state, supporting 14,000 jobs, with A$80-200 million in avoided healthcare costs.[11] A University of Adelaide study found that South Australian national parks contribute more than A$374 million per year to the state economy, and that regular visitors to Adelaide's metropolitan parks generate A$140 million per year in avoided healthcare expenditure. [12] Parks Victoria's estimate includes both urban metropolitan parks and rural national parks; the South Australian national-parks figure is rural and conservation-estate specific.

[11] Parks Victoria. (2015). Valuing Victoria's Parks: Accounting for ecosystems and valuing their benefits. Parks Victoria.
[12] Ravi, S., et al. (2022). Value of South Australia's national parks and reserves (Study 1: Economic contribution). University of Adelaide, Centre for Global Food and Resources. See also: Ravi, S., et al. (2023). Recreational and wellbeing benefits of metropolitan parks: Willingness to pay and reduced healthcare costs associated with Adelaide metropolitan parks (Working Paper No. 2023-02). University of Adelaide.

2.4 New Zealand evidence

New Zealand's domestic evidence base is strong on economic contribution and participation data, but less developed than the UK on health valuation and natural capital accounting. The key New Zealand evidence is:

- Ministry for Culture and Heritage's Sport and Recreation Sector Economic Profile (2024) [13] shows sector contribution of NZ$8.0 billion to GDP (1.9% of total GDP), supports 72,777 filled jobs, with employment growing faster than the total economy (4.2% versus 2.2%).
- Sport NZ's social return on investment analysis (2024) [14] finds NZ$2.12 of social return for every NZ$1 invested in recreational physical activity, generating NZ$16.8 billion in total social value. Health benefits account for 54% of this total (NZ$9.0 billion), making health the single largest value category.
- Deloitte (2022) [15] estimated the cost of physical inactivity at NZ$2.3 billion per year in lost production and NZ$530 million in direct health system costs.
- Trail-specific evidence is strong from MBIE's evaluation of Ngā Haerenga network. [16] It found NZ$1.28 billion in visitor expenditure across 23 Great Rides (MBIE 2025), with trail manager spending of approximately NZ$10 million per year. This represents a 128:1 ratio of visitor expenditure to trail management cost (but leaving out opportunity cost of the ride network land and other resources). The number of businesses servicing Great Rides has grown 81% since 2021, reaching over 2,900 (MBIE, 2025). Patterson (2023) found that mountain biking in production forests generates NZ$291 million in annual spending and supports 1,490 jobs across 96 forests.
- Department of Conservation's (DOC) assessment of public conservation land (2024) [17] estimated NZ$10.9 billion per year in ecosystem services and NZ$3.4 billion per year in tourism value. National parks alone have a non-use value of NZ$12.6 billion, meaning New Zealanders report placing that much dollar value on knowing the parks exist and are protected, even if they never personally visit them.
- Active NZ (Sport NZ, 2025) [18] collected survey evidence for participation. Walking is the most popular physical activity (57% of adults in any given week), followed by running (20%) and cycling (11%). Outdoor recreation is approximately twice as popular as organised sport. This means that investment in outdoor access infrastructure reaches more people, more often, than investment in organised sport facilities.
- Health New Zealand, Green Prescription programme data (cited in Outdoor Access Commission ministerial briefing 2021) showed that when GPs prescribe physical activity,

[13] Infometrics. (2024). Sport and recreation sector economic profile. Ministry for Culture and Heritage / Manatū Taonga.
[14] Sport New Zealand Ihi Aotearoa. (2024). The combined value of sport and active recreation in Aotearoa New Zealand: Measuring the social and economic impact of Sport New Zealand.
[15] Deloitte. (2022). The social and economic cost of physical inactivity in New Zealand. Sport New Zealand.
[16] Angus & Associates. (2021). 2021 evaluation of Ngā Haerenga Great Rides of New Zealand. Ministry of Business, Innovation and Employment.
[17] NZIER. (2024). The value of public conservation land: An ecosystem services assessment. Report to the Department of Conservation, December 2024 and Department of Conservation. (2024). Assessment of the value of public conservation land. Department of Conservation / Te Papa Atawhai.
[18] Sport New Zealand. (2025). Active NZ: Annual report on the 2024/25 New Zealand participation survey. Sport New Zealand Ihi Aotearoa.

predominantly walking, as a preventive and therapeutic intervention, it resulted in 98% patient satisfaction and 85% of participating families becoming more active.

- Ministry for the Environment's lockdown study (2022) [19] is evidence from a natural experiment. During COVID-19 restrictions, the proportion of New Zealanders rating nature access as "very important" to their wellbeing rose from 47% to 62%. Two-thirds of participants experienced feelings of depression, irritability or hopelessness, and 62% experienced anxiety. Those with closer access to nature reported better coping.

2.5 Global and local evidence shows strong positive links between access and economic and wellbeing outcomes

Four findings are consistent across all jurisdictions and all methodologies:

Health benefits are the largest single value category

In the UK, the ONS values health benefits from recreation at GBP 7.9 billion per year. In New Zealand, Sport NZ attributes 54% of total social value (NZ$9.0 billion) to health outcomes. In Australia, physical inactivity costs the health system A$2.4 billion per year. Every jurisdiction that has measured the health-recreation connection has found it to be large.

Trail investment delivers consistently high returns

Scotland's walking and cycling network generates GBP 1.9 billion in local spending from a relatively modest infrastructure base. New Zealand's Ngā Haerenga programme generates a 128:1 ratio of visitor expenditure to trail management cost. Waka Kotahi's own evidence shows NZ$10-35 of return for every NZ$1 invested in cycling infrastructure. Queensland found A$5 per A$1 for cycling infrastructure. Glasgow's Health Walks deliver GBP 8 per GBP 1 invested. The return ratios differ because they measure different things, but the direction is the same everywhere.

Walking is the dominant outdoor activity in every jurisdiction

In England, 68% of adults visit green or natural spaces fortnightly. In Scotland, 61% participate weekly. In New Zealand, 57% walk for exercise in any given week. Walking requires the simplest form of outdoor access infrastructure: a path, a track, or a route that people can use safely. This makes outdoor access investment one of the most efficient ways to increase population-level physical activity.

New Zealand's evidence base is strong, with opportunities to build further

Taken together, the New Zealand evidence base is strong. Sport NZ's social return on investment analysis, the Ministry for Culture and Heritage's sector economic profile, Deloitte's physical inactivity cost estimate, MBIE's Ngā Haerenga evaluation, the Department of Conservation's public conservation land assessment, Active NZ participation data, the Green Prescription programme data, and the Ministry for the Environment's lockdown study together cover the health, economic,

[19] Ministry for the Environment. (2022). Value of nature for wellbeing during times of crisis: COVID-19 case study. Ministry for the Environment / Manatū Mō Te Taiao.

participation, tourism, and wellbeing dimensions of outdoor access in New Zealand. Taken with the international evidence set out above, the base for informed decision-making is already substantial.

There are three opportunities to deepen the evidence base (not prerequisites for action). First, New Zealand does not yet produce a dedicated National Natural Capital Account for recreation of the kind published annually by the ONS in the UK. Second, New Zealand has no equivalent of Defra's Outdoor Recreation Valuation Tool (ORVal), which monetises the welfare value of each mapped greenspace site in England and Wales. Third, the existing domestic data is largely cross-sectional. Longitudinal tracking of how participation, health outcomes and economic flows change over time in different regions is sparse.

3 Two New Zealand examples show how outdoor access creates value in practice

The two case studies illustrate different ways Outdoor Access Commission enables outdoor access benefits:

- Case study 1: The Kawatiri Coastal Trail is a community-led project creating new access infrastructure in a district that lost its industrial employment base.
- Case study 2: Mountain biking in production forests shows how access on existing working land generates economic value without displacing the primary land use.

Kawatiri and production forests sit at opposite ends of the same mandate. Kawatiri is a new, community-led public trail on a mixed public-private corridor. The Commission facilitated its development, creating durable legal access through easements, advising on route planning, and funding legal costs. Production forests are an existing large-scale estate of voluntary access arrangements on private commercial land. The Commission provides the expertise and frameworks that help access arrangements work consistently, quickly, and at scale. Taken together, the two cases span the Commission's statutory spectrum: from creating new access where none exists, to maintaining access that already delivers at scale.

The economic activity from both case studies is real, measurable and regionally significant. However, the agencies with relevant mandates do not recognise the role of outdoor access. MPI's Te Uru Rākau focusses on timber; MBIE focusses on tourism flows; Sport NZ recognises cyclists; Treasury's Living Standards Framework defines categories but does not recognise the data. The gap between operational reality and strategic narrative is a clear opportunity. The Commission is the obvious agency to champion closing it, through a “National Strategy for Outdoor Public Access” and sector-level collaboration.

3.1 Kawatiri Coastal Trail: replacing industrial employment with sustainable tourism (case study 1)

The Kawatiri Coastal Trail is a 40-kilometre shared walking and cycling trail along the coast from Westport to Charleston, following routes used by Māori and 1860s gold miners. It is a grade 2, family-friendly trail designed to be accessible to most ages, fitness levels, and abilities. The trail was

built in stages from 2021, and reached full opening in March 2025. Operating data for the first full year (1 April 2025 to 31 March 2026) is now available and forms the basis of the case study.[20]

Westport is the principal town of the Buller District on the West Coast of the South Island, with a population of fewer than 5,000. The district has historically depended on mining and energy intensive cement production. Coal mining has declined significantly, and some gold and other mineral extraction continues and remains viable. Cement production at the Holcim cement factory ceased in 2016, removing a significant source of local employment. The closure intensified the need for economic diversification in a district where options were already limited.

The trail was initiated by the local community, which saw an opportunity to share its coastal environment while contributing to the economic wellbeing of the district. It is a community-led project, not a government programme.

Trail recorded 32,000 users and approximately $18 million of visitor spending in its first full operating year

In its first full operating year (April 2025 to March 2026), the Kawatiri Coastal Trail recorded 32,000 trail users. The trail's first-year visitor spending of approximately $18 million is comparable to the entire 12-year total economic benefit projected in 2021 ($18.2 million). The trail has effectively delivered its full 12-year forecast inside 12 months of full operation.

Survey evidence shows that 70 per cent are visitors from outside the host region, equivalent to approximately 20,800 visitors. Of those visitors, 78.6 per cent reported that the trail was the only or main reason they were in the area. The average visitor spent $874.80 in the host region, with the largest categories being accommodation ($387.80 per visitor), tour or package costs ($103.40), cafés and restaurants ($100.40) and bars ($87.80). On those numbers, the trail supported approximately $18 million of new visitor spending in the Buller District in its first 12 months of full operation.[21] Table 2 summarises the economic impact:

Kawatiri Coastal Trail performance, first full operating year (1 April 2025 to 31 March 2026)

Metric	Value
Total trail users	32,000
Visitor share of users	70%
Estimated visitors	~20,800
Visitors travelling specifically because of the trail	78.6%
Average nights stayed in host region per visitor	2.7
Average spend per visitor	$874.80
Total visitor spending in host region	~$18 million
Construction-phase jobs (2021–2025)	30

[20] Personal communication with Edee Richards, Trail Manager, Kawatiri Coastal Trail Trust, 30 April 2026; Kawatiri Coastal Trail monthly survey report, 7 April 2026 (Get Smart). Survey methodology aligns with the Ngā Haerenga New Zealand Cycle Trail evaluation framework.

[21] Kawatiri Coastal Trail monthly survey report, 7 April 2026, pp. 9, 10, 20–21. Visitor spending estimated as 20,800 visitors × $874.80 = $18.2 million. Survey sample size was n=40 for visitor share and reason-for-visit, n=22 for expenditure.

Ongoing FTE at Cycle Journeys Westport depot	7

Source: Kawatiri Coastal Trail Trust, monthly survey report 7 April 2026 (Get Smart), pp. 9, 10, 20–21; personal communication, Edee Richards, Trail Manager, 30 April 2026.

The trail's first full year coincides with measurable activity in trail-supporting businesses across the Buller District. Cycle Journeys, a bike hire and shuttle operator, has established a depot in Westport that employs seven staff. Buller Taxis has expanded its services to include cyclist pick-up and drop-off, investing in a robust bike rack and providing driver training for bike loading. Aidan Schurr, Manager at Underworld Adventures and Café, reports that café visitation rose approximately 40 per cent year-on-year in February 2026, "a strong result in what is typically a key shoulder season". Sarah Stephens of Charleston Goldfields Accommodation describes "a noticeable positive energy in the Charleston community since the full opening of the trail in March", with guests staying both single-night during a 40-kilometre journey and across multiple nights for the full 80-kilometre return ride. Accommodation providers in Westport and surrounding areas have established direct relationships with cycle tour operators to host trail-related groups. The trail is delivering employment in a district that lost an important local employer when the Holcim cement factory closed in 2016, and provides a working example of post-industrial economic adaptation in a small West Coast economy.[22]

Outdoor Access Commission has supported legal access, provided advice and some funding

The Commission's involvement demonstrates its core statutory functions:

- Legal access through easements: The Commission negotiated easements creating public access in perpetuity. This is its distinctive capability: creating durable legal access across private and public land that endures regardless of future ownership changes.
- Advisory support: The Commission provided expert advice on access agreements, route planning, and stakeholder engagement.
- Grant funding for legal costs: For a community-led project with limited resources, this practical financial support was essential to securing the legal framework for the trail.
- Cross-boundary coordination: The trail crosses public conservation land, private farmland, and council land. The Commission is the only agency with the mandate to work across all these land types.

Trail relies on access to private primary sector land and provides income to landowners

The trail runs through farming and forestry land. Access arrangements with landowners are integral to its route. For some rural landowners, providing public access creates opportunities for income diversification. The Cable Bay Walkway in Nelson Tasman is an analogous example: the walkway crosses private farmland, and the landowners have developed a camping ground and cafe, while nearby residents have built kayaking, adventure park, horse riding, and motorbike businesses.

[22] Personal communication with Edee Richards, Trail Manager, Kawatiri Coastal Trail Trust, 30 April 2026.

This dynamic is central to the policy case for the Commission. Outdoor access is not in tension with primary production. It can be complementary to it.

Kawatiri trail contributes to improving living standards

The Kawatiri trail contributes across all four capitals of Treasury's Living Standards Framework, in Table 3 below. These contributions are not directly recognised in relevant agencies' reporting. MBIE reports West Coast tourism volume, not Kawatiri's share of it (which is related to MBIE's trails mandate). Health NZ reports physical-activity participation, but does not directly report on the infrastructure enabling it. The contribution is real, and given that the district has fewer than 5,000 people, proportionally large.

Table 3.2: Kawatiri trail living standards framework contributions

Capital	Contribution
Financial/physical	~$18m delivered visitor spending in year 1 (1 April 2025 – 31 March 2026); 30 jobs during construction; 7 ongoing FTE at the Cycle Journeys Westport depot, with further indirect employment across cafés, accommodation and transport providers
Human	Health benefits to approximately 9,600 local users (30% of 32,000) and 20,800 visitors from active recreation; new skills and capability in trail-related businesses
Social	Community-led trail trust; rural-urban connection (78.6% of visitors travelled to the West Coast specifically because of the trail); volunteer engagement across the construction phase
Natural	Coastal environment connection; conservation awareness through trail interpretation; low-impact tourism model in a previously industrial district.

3.2 Mountain biking in production forests: economic value from access on working land (case study 2)

New Zealand's production forestry estate is one of the country's largest working landscapes. It also provides one of the largest landscapes for recreational use. In 2022, 96 plantation forests hosted 600,000 mountain bike riders and supported $291 million of new visitor spending in the host regions.[23] Production forests demonstrate the economic scale already being delivered by access arrangements on existing commercial land.

New Zealand's plantation forest estate hosts mountain biking as a compatible secondary use

New Zealand's plantation forestry estate covers approximately 1.75 million hectares (~7 percent of the national land area), concentrated in the central North Island, Nelson Tasman, and parts of the South Island high country.[24] Ownership is mixed: some forests are held on Crown Forest Licences administered by Te Uru Rākau, but most sit on private freehold or long-lease arrangements held by New Zealand and overseas forestry companies. The estate exists primarily to produce timber: log and wood exports totalled about $6.7 billion in 2022.[25]

[23] Patterson, B. (2023). Economic impacts of mountain biking in production forests in New Zealand. Benje Patterson | People & Places; 600,000 riders across 96 forests during the 2022 year using Trailforks check-ins scaled against Sport NZ participation surveys.'
[24] Ministry for Primary Industries | Te Uru Rakau. (2023). New Zealand plantation forestry statistics 2022. MPI.
[25] Patterson, B. (2023). Economic impacts of mountain biking in production forests in New Zealand, p.2. Benje Patterson | People & Places.

Mountain biking on these forests grew from the 1990s onward, initiated by local riders who built informal trails and progressively by forest owners who signed formal access agreements with trail-building trusts and community groups. The permissions are voluntary and vary by forest. Some are permits, some licences, some memoranda of understanding. The access arrangements share a common pattern: recreation is a compatible secondary use alongside the commercial primary use of growing and harvesting timber.

Production forests delivered $291 million of visitor spending, 1,490 jobs and 600,000 riders in 2022

Patterson's 2023 analysis (drawing on Trailforks rider check-in data, Ministry of Business, Innovation and Employment tourism data, and Rotorua Lakes Council survey work) identified 96 production forests with active recreational mountain biking in 2022.[26] Those forests hosted 600,000 riders during the year. 335,000 visitors were from outside the host region and 265,000 were local. Bike visitors are longer-staying, higher-spending visitors compared to the average visitors and metrics that shape tourism policy. Bike visitors stayed on average 3.9 nights in the host region (versus 2.2 for all New Zealand visitors) and spent $292 per day (versus $191). Table 3.3 summarises the key results from Patterson's 2023 review:

Table 3.3: Economic impact of mountain biking in production forests (Patterson, 2023)

Metric	Value
Mountain bikers (annual)	600,000
Annual spending	$291 million
Jobs supported	1,490
Production forests with trails	96
Data year	2022 actuals

Source: Patterson, B. (2023). Economic impacts of mountain biking in production forests in New Zealand. Benje Patterson | People & Places

New visitor spending in host regions totalled $291 million in 2022, a 68 percent increase on the $173 million recorded in 2019. About one-third of that spend is bike-specific (trails, gear, repairs) and two-thirds is general (accommodation, hospitality, transport), spreading the economic benefit across each host regional economy. Applying Statistics New Zealand's Tourism Satellite Account spending-to-jobs multiplier, Patterson estimates the spending supports 1,490 filled jobs — approximately one percent of total New Zealand tourism employment.[27]

A further $130 million of annual mental and physical health benefit is estimated to accrue to locals who ride regularly, calculated against Waka Kotahi's current $4.90 per kilometre cycling value and

[26] Patterson, B. (2023). Economic impacts of mountain biking in production forests in New Zealand, pp.4-6. Benje Patterson | People & Places.
[27] Patterson, B. (2023). Economic impacts of mountain biking in production forests in New Zealand, pp.7-8. Benje Patterson | People & Places.

conservatively halved to reflect only net-new exercise.[28] Rotorua, mainly through the Whakarewarewa Forest, attracts $111 million of the national $291 million on its own.

Access agreements (not the forests themselves) enable the benefits

The $291 million is not delivered by the existence of trees. It is delivered by the set of private commercial agreements that grant riders permission to cross, ride, build, and return. Patterson's first-ranked success factor for regions wanting to grow this activity is explicit on the point: "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."[29] Without access, the economic activity does not exist. Access is the active ingredient.

The Outdoor Access Commission is the only agency whose statutory remit under the Walking Access Act 2008 spans the land types, landowner types and access instruments that this activity depends on. The Commission is a cross-boundary steward of the agreements, easements and relationships that convert land into access. The Commission provides the expertise to help deliver these access arrangements at scale, consistently, quickly, and accurately than they would otherwise be achieved. Production forests provide a significant live demonstration of the Commission's model: there are 96 separate sets of permissions (although not all directly involving the Commission) on privately owned working land, enable hundreds of millions of dollars of regional economic activity.

For forest owners, permission agreements are a source of additional revenue complementary to timber and carbon. In a carbon-forest economy where timber-harvest cycles lengthen and timber revenues fluctuate, recreational-access revenue and broader community goodwill can help diversify the economic case for continued active forest management.

Production forest biking contributes across all four capitals of the Living Standards Framework

Production forest biking contributes across all four capitals of Treasury's Living Standards Framework, in Table 3.4 below. These contributions are not directly captured in relation to the related sector by responsible agencies. MPI reports timber exports, not forest biking. MBIE reports tourism volume, not the production-forest component. The economic activity is real and growing.

Table 3.4: Living standards framework contributions of mountain biking in production forests

Capital	Contribution
Financial/physical	$291m annual new visitor spending in host regions; 1,490 jobs; $318m forecast by 2027 (+9.5%)

[28] Patterson, B. (2023). Economic impacts of mountain biking in production forests in New Zealand, p.5. NZ Transport Agency Waka Kotahi. (2024). Monetised benefits and costs manual (v1.7.2), pp.58-59.
[29] Patterson, B. (2023). Economic impacts of mountain biking in production forests in New Zealand, pp.9, 11. Benje Patterson | People & Places.

Human	$130m estimated annual health benefit to locals; physical and mental health from regular riding
Social	96 regional communities with active riding networks, trail-building volunteers, and governance bodies
Natural	1.75 million hectares of working landscape kept accessible and economically valued for more than timber; compatible dual-use model

4 New Zealand agencies under-recognise the benefits of outdoor access

We mapped 19 government agencies. For each agency, we compared the agency's operational reality (what its funded programmes, statutory functions, and case studies in its Annual Report actually do) with its strategic narrative (what its statute, Statement of Intent and headline strategy documents say). The benchmark is the agency's own documented activity. The Walking Access Act 2008 (s3) standard of "free, certain, enduring and practical access to the outdoors" sits underneath our analysis as the definition of what outdoor access means. We do not we hold every agency against this standard.

We use five-tier classification to map each agency’s contribution. The five tiers are:

- **Explicit:** The agency's legislation, strategy, or Statement of Intent directly names outdoor access, walking, cycling, trails, or recreation infrastructure as a function or objective.
- **Mixed:** The agency explicitly recognises outdoor access in one part of its system (such as a curriculum, programme specification, or operational guideline) while remaining silent on it in its Statement of Intent, Annual Report, or headline strategy.
- **Implicit:** The agency's objectives depend on or benefit from outdoor access without naming it. The reasoning chain is documented for each.
- **Implicit (weak):** The agency's objectives benefit from outdoor access only indirectly, and the connection is mentioned in passing or in subsidiary documents rather than in its strategic narrative.
- **No recognition:** The agency's objectives would benefit from outdoor access but no reference exists in statute, strategy, or Statement of Intent.

We summarise the results of the analysis in section 4.1 and then identify thematic patterns. The table below summarises where each agency sits against the five-tier classification.

4.1 Agencies have a mixed record of recognising contribution of outdoor access

The following table summarises the analysis of agencies and their recognition of outdoor access:

Table 4.1: Analysis of 19 agencies and outdoor access recognition

Tier	Agency (Māori)	Agency function	OA recognition	Key insights	Source documents
Explicit	**DOC / Te Papa Atawhai**	Lead conservation agency; administers the Conservation Act 1987, Reserves Act 1977, National Parks Act 1980, Wildlife Act 1953; manages ~8.8m ha public conservation land (one-third of NZ).	Explicit. Conservation Act 1987 s6(e) reproduced verbatim in Strategic Intentions; 'promoting responsible access' named as a Minister's priority; Herenga ā Nuku named as a recreation-sector partner; tourism on public conservation land valued at $3.4bn/yr.	Only agency with statutory public-access mandate over one-third of NZ land. Live issue: DOC access-charging pilots (Oct 2025) directly challenge the 'free' limb of Walking Access Act 2008 s3.	Strategic Intentions 2025-2029; Annual Report 2024/25; Value of Public Conservation Land 2024.
Explicit	**Sport NZ / Ihi Aotearoa**	Crown entity under Sport and Recreation NZ Act 2002; promotes participation in sport and active recreation; named partner under Walking Access Act 2008 s10(1)(a)(i).	Explicit (weaker end). Names 'Accessible natural and built environments' as a success outcome; runs 'Active Recreation Investment' programme; commits to 'Oranga Taiao, Oranga Tangata'.	Herenga ā Nuku is NOT named in any Sport NZ national strategic document despite 11 other named cross-agency partners. Partnership operates only at Regional Sports Trust level. Sport NZ is the only agency named in the Walking Access Act itself.	Strategic Plan 2024-2028; SPE 2024/25; Annual Report 2024/25; Active NZ Participation Trends 2017-2023.
Explicit	**LINZ / Toitu Te Whenua**	Regulatory stewardship of Crown property system: property rights, property information, Crown Land (including Crown pastoral), and overseas investment screening.	Explicit. CPLA Strategic Intentions 2024-2029 Appendix 3 names Herenga ā Nuku (Māori + English) as a strategic partner. OIO guidance operationalises 'continued or enhanced public access' under OIAA 2021 s17(1)(c), with preference for 'enduring mechanisms such as a walkway easement'.	Two independent counts establish Explicit tier. LINZ umbrella SI 2023-27 does NOT name the Commission — uplift target is next umbrella SI refresh. OIO guidance establishes Crown policy that foreign-investment-derived access must endure.	LINZ SI 2023-27; CPLA SI 2024-2029; CPLA Performance Monitoring Framework; OIO guidance 'Continued or enhanced public access' (Jun 2024); LINZ Annual Report 2023/24.

Explicit	**Herenga ā Nuku Aotearoa (baseline)**	Crown agent under Walking Access Act 2008 s10; mandated to provide free, certain, enduring, practical walking access to the outdoors.	Explicit (baseline). Walking Access Act 2008 s3 establishes statutory purpose: 'to provide the NZ public with free, certain, enduring, and practical walking access to the outdoors... so that the public can enjoy the outdoors'.	Gap finding on OAC's forward posture: no submissions on GPS-LT 2024, NIP 2025, DOC SI 2025-29, MBIE tourism strategy, Sport NZ strategic plan — even though Sport NZ is the only named partner in Walking Access Act s10(1)(a)(i).	Walking Access Act 2008; SOI 2024-28; SPE 2025/26; Annual Report 2024/25; State of Public Outdoor Access Report 2026; 14 published submissions.
Mixed	**Ministry of Education**	Education policy, regulation and school property; administers NZ Curriculum, NELP, Tertiary Education Strategy and School Property Strategy 2030.	Mixed. NZ Curriculum HPE and EOTC Guidelines return 400+ hits for outdoor, adventure, tramping and back-country. SI 2025-2029, AR 2025, TES, NELP and School Property Strategy return ZERO hits.	Sharpest framework-narrative gap in the 19-agency review. Curriculum depends on access; strategic reporting line is silent. Any access-supply change (hut closures, paid park entry, camp closures, landlocked paper roads) affects the curriculum but no strategic accountability surfaces the risk.	MoE SI 2025-2029; AR 2025; TES 2025-2030; NELP-TES 2020; School Property Strategy 2030; EOTC Guidelines (Bringing the Curriculum Alive); NZ Curriculum HPE.
Implicit	**MPI (incl Te Uru Rakau, Fisheries NZ)**	Primary production regulator; biosecurity; forestry (Te Uru Rakau); fisheries (Fisheries NZ); administers Crown Forest Licences and production forestry estate.	Implicit. Fisheries NZ statutory purpose names 'recreational, customary, and commercial fishers'. Te Uru Rakau describes forests as supporting 'natural, physical, economic, social, and cultural wellbeing'.	Crown Forest Licences carry NAMED s6 (Public Entry) and s7 (Public Access Easement) provisions. Herenga ā Nuku guidance points forestry managers to these instruments; MPI strategic documents never surface them. 'Access' in MPI usage systematically means market access (exports), not public access.	MPI SI 2024-2028; MPI AR 2024/25; Te Uru Rakau Portfolio Briefing 2023; Forestry and Wood Processing Industry Transformation Plan.
Implicit	**Tourism NZ (+ MBIE tourism policy)**	Crown entity promoting NZ as an international visitor destination; operates 100% Pure New Zealand campaign; MBIE holds tourism policy stewardship.	Implicit. 100% Pure brand built on 'stunning landscapes' and 'nature'. NZ-Aotearoa Government Tourism Strategy 2019 names natural environment as visitor drawcard.	Zero matches for Herenga a Nuku, walking access, outdoor access, public access, Walking Access Act or Te Araroa across six corporate documents plus MBIE tourism strategies. Clean evidential gap — major beneficiary of	TNZ SOI 2024-2028; SPE 2025/26; AR 2023/24; NZ-Aotearoa Government Tourism Strategy 2019 (MBIE+DOC); MBIE Tourism Growth Roadmap 2025.

				outdoor access, entirely absent from outdoor access policy discourse.	
Implicit	**Waka Kotahi / NZ Transport Agency**	Crown entity for the land transport system; NZ's single largest public funder of walking and cycling infrastructure; administers NLTP via GPS-LT.	Implicit. $460m ring-fenced Walking and Cycling Improvements activity class 2024-27 (halved from 2021-24); 25%-on-footpaths floor in GPS-LT 2024; MBCM monetises walking/cycling health benefits at per-km dollar values.	Most fiscally consequential agency for urban access infrastructure. Herenga ā Nuku not named anywhere. Keeping Cities Moving mode-shift strategy and six regional plans are operational; sit below GPS-LT strategic priorities (economic growth, maintenance, safety, value for money).	SOI 2024-2028; GPS-LT 2024; NLTP 2024-27; MBCM v1.7.2; Tu Ake Tu Maia Regulatory Strategy 2023-2032; Annual Reports 2023/24 and 2024/25.
Implicit	**Treasury / Te Tai Ohanga**	Central economic and fiscal adviser; manages Crown financial affairs; owns the Living Standards Framework and the CBAx valuation tool.	Implicit. LSF names Environmental Amenity, Leisure and Play, and Health as wellbeing domains. CBAx treats outdoor recreation as a natural-capital value. Symbolic: SI cover photo is the Mueller Hut Trail.	Treasury's own Strategic Intentions and Budget Policy Statement 2026 are silent on outdoor access, walking, cycling, recreation or Herenga a Nuku. Frameworks Treasury owns do the valuation work; Treasury's own narrative does not carry it.	BPS 2026; SI 2024-2028; CBAx Guide Oct 2022; LSF 2021; Annual Report 2023/24.
Implicit	**Te Waihanga (NZ Infrastructure Commission)**	Crown entity providing advice on infrastructure strategy, pipeline and investment decisions; produces National Infrastructure Plan and Rautaki Hanganga.	Implicit. Rautaki Hanganga 2022-52 and NIP 2026 define infrastructure to include 'public parks and green spaces' as social infrastructure. Active transport is a Strategy and NIP recommendation. Recreation named as a connectivity outcome.	Zero direct references to outdoor access, public access, walking access, Herenga a Nuku, Walking Access Act, tracks, trails, reserves or paper roads across ~42,000 lines of text. Only one recreation example (Memorial Park Recreation Hub, Tauranga) in NIP pipeline; none of 16 NIP	Rautaki Hanganga 2022-52; NIP 2026 (final); NIP 2025 draft; SOI 2025-2029; SPE 2025/26; Annual Report 2024/25.

				recommendations targets outdoor access.	
Implicit	**MBIE (non-tourism functions)**	Economic development; employment; business; science and innovation; energy; Infrastructure for Growth pillar; Regional Infrastructure Fund; Ngā Haerenga / NZ Cycle Trail.	Implicit. MBIE owns $950m Ngā Haerenga programme; Tourism Growth Roadmap 2025 references natural environment; 'Infrastructure for Growth' pillar articulates investment approach.	No MBIE strategic document uses 'outdoor access', 'public access', 'walking access', 'recreation' or 'Outdoor Access Commission'. Going for Growth (Feb 2025) silent on trails, cycleways, recreation. RIF principles name water, energy, Māori economic development, enabling infrastructure, resilience — not trails. NZCT Design Guide 6th ed names partners (NZCT Inc, DOC, Waka Kotahi, councils, trusts, sponsors); omits Outdoor Access Commission.	SI 2023-2028; AR 2024/25; Going for Growth (Feb 2025); Infrastructure for Growth (Jul 2025); NZCT Design Guide 6th ed (Jul 2024); RIF investment principles.
Implicit	**Health NZ / MoH (Manatu Hauora)**	Health NZ delivers public health services; Manatu Hauora is policy steward; GPS-Health sets direction. Manages public health system, NCD prevention, physical activity promotion.	Implicit. Te Pae Waenga names physical inactivity as one of five modifiable NCD risk factors. Eating and Activity Guidelines explicitly name 'walking tracks, parks and hills' and define built environment walkability.	Green Prescription (HP5088) lists generic activities (brisk walking, kapa haka, cycling, swimming, gym); no outdoor/nature specification at programme level — outdoor delivery is RST-level. 2024 PHA briefing warns 'deprioritising active transport investment will further accelerate decreases' in PA. Guideline compliance fell 51%->47% 2021/22-22/23.	Te Pae Waenga NZ Health Plan 2024-27; Health NZ SOI 2024-28; SPE 2024/25 and 2025/26; GPS-Health 2024-2027; Te Pae Tata 2022; Pae Ora IGPS 2022; Eating & Activity Guidelines 2020; Green Prescription HP5088; PHA Briefing 2024.

Implicit	**TPK / Te Puni Kokiri**	Ministry of Māori Development; advises on Crown-Māori relationships; owns Whenua Māori programme (including landlocked-whenua workstream). Māori Crown Relations consolidated at TPK from Feb 2025.	Implicit. TPK owns Crown workstream on landlocked Māori land, paper roads and access roads on whenua Māori; stewards Te Ture Whenua Māori Act 1993 (2020 amendment requires courts to consider applicant's relationship to whenua and water in landlocked cases).	Strategic documents do not use 'outdoor access', 'public access', 'walking access', 'recreation' or 'Outdoor Access Commission'. 2023/24 AR documents TPK-funded access road unlocking 'previously landlocked Wellington block' for cycle tourism. Māori Land Service is operational counterpart to Outdoor Access Commission.	TPK SI 2025-2029; Annual Reports 2023/24 and 2024/25; Whenua Māori Programme materials.
Implicit	**Te Tari Whakatau (former Te Arawhiti)**	Office of Treaty Settlements and Takutai Moana; administers negotiations and Red Book policy. Partially disestablished Aug 2024; Māori Crown Relations transferred to TPK Feb 2025.	Implicit. Red Book 2025 references 'public access' 14 times as a standing Crown interest, preserved through easements, Reserves Act s38 transfers, DOC-retained marginal strips, statutory acknowledgements and co-governance regimes (Te Urewera, Waikato River, Te Kahui Tupua / Taranaki Maunga).	Core doctrine requires balancing claimant aspirations against 'continued protection of and public access to conservation areas'. Strategic narrative is silent. Settlement mechanics carry public access; strategic voice does not.	Te Arawhiti AR 2022/23; MoJ AR 2023/24 (Te Arawhiti); Red Book 2025 (5th ed.); Red Book 2020 edition.
Implicit	**HUD / Te Tuapapa Kura Kainga**	Housing and urban development policy; owns GPS-HUD; partners with MfE on NPS-Urban Development.	Implicit. GPS-HUD 2025 names 'Thriving and resilient communities' outcome with 'well-functioning physical and community infrastructure'; NPS-UD walkable-catchment construct.	Zero substantive matches for outdoor access, public access, walking access, Outdoor Access Commission, open space, green space, walkability or active transport. NPS-UD walkable catchments is the strongest implicit anchor — operational instrument, not strategic recognition.	GPS-HUD 2025 (Nov 2025); Statement of Strategic Intentions 2025-2029; Annual Report 2024/25; NPS-UD.

Implicit (weak)	**MfE / Manatu mo te Taiao**	Environmental policy, reporting and regulation; lead on RMA replacement; administers National Policy Statements (freshwater, indigenous biodiversity, urban development); State of the Environment reporting.	Implicit (weak). Our Environment 2025 names walking, swimming, parks and reserves as benefits; case studies show trails/cycleways as flood-mitigation co-benefits; NPS-IB references 'recreational' cultural ecosystem service.	Strategic Framework (3 outcomes, 5 priorities) does not use 'outdoor access', 'public access', 'walking access', 'recreation', 'esplanade', 'marginal strip', 'open space', 'Herenga' or 'amenity' as strategic concepts. RMA Replacement RIS Matter 2 silent on s6(d), esplanade reserves, marginal strips — most consequential strategic gap.	SI 2025-2029 (Feb 2025); AR 2024/25; Our Environment 2025; RIS Replacing the RMA; NPS-Indigenous Biodiversity (amended Oct 2024); National Adaptation Plan Table of Actions.
Implicit (weak)	**DIA / Te Tari Taiwhenua**	Department of Internal Affairs; stewards local government sector through LGA 2002; administers Future for Local Government reforms.	Implicit (weak). Stewardship of LGA 2002 s10 community-wellbeing purpose indirectly transmits recreation/parks responsibility to councils.	DIA's own Strategic Intentions and AR never name outdoor access, parks, reserves, walking tracks, outdoor recreation or Outdoor Access Commission. Only use of 'recreation' is metaphorical (digital inclusion). A defensible 'No recognition' reading of DIA's own voice is possible.	DIA SI 2024-2028; DIA AR 2024/25; Future for Local Government Review Final Report 2023.
Implicit (weak)	**NZTE / Te Taurapa Tuhono**	Crown entity promoting NZ exporters offshore; administrative host of the NZ Story Group (inter-agency NZ Inc brand vehicle).	Implicit (weak). NZTE hosts the NZ Story narrative ('Open Spaces, Open Hearts, Open Minds'; Kaitiaki, Ingenuity, Integrity).	NZTE's SOI, SPEs and BIM contain no references to outdoor access, Outdoor Access Commission, recreation, Walking Access Act, Great Walks, Te Araroa or physical activity. NZ Story is 'governed by an independent advisory board' and 'housed within NZTE to ensure operational efficiency'. Collaborative Activity funding reduced from ~$9.4m (FY24) to ~$2.4m (FY26). SPE 2025/26 commits NZTE to 'return to its single mandate, focussing on the growth of exporters'.	NZTE SOI 2019-2023; SPE 2024/25; SPE 2025/26; Briefing to Incoming Minister (Nov 2023); NZ Story Group narrative.

No recognition	**LGNZ (Local Government NZ)**	Sector representative body for New Zealand councils; advocates and coordinates across all 78 local authorities.	No recognition.	LGNZ's five member-set priorities (funding/financing, water, RM reform, transport, climate) and six 2022-25 long-term goals make zero reference to outdoor access, parks, reserves, walking tracks or Outdoor Access Commission. 'Reserves' appears only in financial-accounting usage. Councils operate ~75% of NZ walking tracks and hold esplanade reserves; no MoU/partnership between OAC and DIA or LGNZ is referenced.	LGNZ Annual Report 2024/25; LGNZ Policy Priorities.
No recognition	**MFAT / Manatu Aorere**	International relations; trade negotiation; consular services; NZ Aid Programme; 58 offshore posts; c.1,700 staff.	No recognition.	Three pillars (Security, Prosperity, Sustainability) translate into trade diplomacy, values-based diplomacy and Pacific climate diplomacy ($1.3bn climate finance). NZ Story ('Open Spaces, Open Hearts, Open Minds') is stewarded by NZTE, not MFAT. No direct policy hook at MFAT. Closest adjacency is Pacific climate adaptation (ecosystems, fisheries, water security) — thematically distant from domestic outdoor access.	SI 2024-2028; AR 2024/25; Strategic Foreign Policy Assessment 2023 'Navigating a shifting world'; Pacific Regional Plan 2024-27.

4.2 Thematic patterns of recognition (or not) on outdoor access

We have analysed the key themes that emerge from the review of the 20 agencies and identified seven:

- Health agencies prescribe outdoor activity but do not recognise the role of outdoor access
- Tourism agencies and international representatives have a strategic misalignment between New Zealand's outdoor access imagery and the outdoor access network
- Trail networks provide an economic return but are not recognised as infrastructure
- Urban densification is occurring without a corresponding investment in access and walkability
- Māori access to whenua has mixed recognition in agency reporting.
- Education curriculum depends on outdoor access but the strategic layer does not recognise it
- Crown valuation tools price outdoor access but the investment pipeline does not see it.

4.2.1 Health agencies prescribe outdoor activity but do not recognise the places that enables it

Health is where the agency system comes closest to recognising outdoor access, but it recognises the behaviour (physical activity) without recognising the place (the track, the park, the footpath). This is not unique to health, it is common to all 19 agencies in different degrees. Health New Zealand's Te Pae Waenga names physical inactivity as one of five modifiable non-communicable disease risk factors and uses the proportion of adults meeting physical activity guidelines as a reporting measure.[30] The Ministry of Health's Eating and Activity Guidelines go further, explicitly naming "walking tracks, parks and hills" and defining the built environment to include "cycle lanes, gardens, sports fields, parks and other open spaces... an essential factor affecting walkability".[31] Waka Kotahi's Monetised Benefits and Costs Manual attaches per-kilometre dollar values to walking and cycling health benefits (NZ$9.90 per kilometre for pedestrians, NZ$4.90 per kilometre for conventional cycling and NZ$2.50 per kilometre for e-biking capped annually per new user).[32] Sport NZ reports that 57% of adults walk for recreation and 11% cycle.[33] Neither Ministry of Health nor Health NZ allocates capital budget to the outdoor access infrastructure on which Green Prescription delivery depends.

None of this links in the strategic narrative to the infrastructure on which it depends. The Health NZ Green Prescription programme specification lists generic activities such as brisk walking, kapa haka, cycling, swimming, gym without naming outdoor environments.[34] The 2024 Public Health Association briefing warned that "deprioritising active transport investment will further accelerate decreases" in physical activity.[35] Compliance with the guidelines fell from 51% to 47% between

[30] Health New Zealand | Te Whatu Ora. (2024). Te Pae Waenga NZ Health Plan 2024-27. Health New Zealand.
[31] Ministry of Health. (2020). Eating and activity guidelines for New Zealand adults. Manatu Hauora.
[32] NZ Transport Agency Waka Kotahi. (2024). Monetised benefits and costs manual (v1.7.2). NZTA.
[33] Sport New Zealand Ihi Aotearoa. (2023). Active NZ participation trends 2017-2023. Sport NZ.
[34] Health New Zealand | Te Whatu Ora. (2024). Green Prescription programme specification (HP5088). Health NZ.
[35] Public Health Association of New Zealand. (2024). Briefing to incoming government 2024. PHA.

2021/22 and 2022/23. Deloitte priced the cost of physical inactivity to New Zealand at NZ$2.3bn per year in lost production and NZ$530m in direct health system cost.[36] Health agencies prescribe outdoor activity. They do not invest in the places where it happens.

4.2.2 Strategic misalignment: tourism and international-representation agencies monetise outdoor imagery abroad but do not make the connection to the access network at home

New Zealand's international brand rests explicitly on outdoor landscape. The “NZ Story” (a cross-agency brand platform) is organised around the chapter framework "Open Spaces, Open Hearts, Open Minds", with the outdoor estate as its first chapter[37]. Tourism New Zealand names the natural environment as the primary pillar of New Zealand's tourism proposition in its Statement of Intent and has built the "100% Pure" brand on that imagery for 30 years.[38] MBIE's tourism strategies reinforce the same logic: nature-based tourism is a core earnings engine and a regional-development lever[39]. MFAT, participates in the New Zealand Story Board alongside Tourism New Zealand and NZTE. Its own Strategic Intentions 2024–28 and Strategic Foreign Policy Assessment 2023, however, frame New Zealand's international identity through trade, values-based diplomacy and climate diplomacy. These documents do not mention the outdoor estate across from NZ Story.[40]

There is a related disconnect at the operational layer. NZTE hosts the New Zealand Story Group, but its own Statement of Intent, Statements of Performance Expectations and Briefing to the Incoming Minister do not reference the NZ Story's "Open Spaces" chapter or the outdoor estate as part of the export-brand proposition. NZTE has also reduced its Collaborative Activity funding from $9.4m in FY24 to $2.4m in FY26 (this is the line item that enables industry sectors to take the outdoor-access story offshore).[41] This line item enables industry sectors to promote New Zealand’s outdoor access story offshore. None of the agencies that monetise outdoor imagery internationally (Tourism New Zealand, NZTE, MFAT, MBIE) names the domestic access network as the asset underneath the brand. DOC's 2024 Value of Public Conservation Land assessment estimates $3.4bn per year in tourism value flowing from conservation land,[42] but the agencies that capture that value abroad have no strategic commitment to maintaining the physical network it depends on.

4.2.3 Trail networks generate demonstrable returns but sit outside the infrastructure pipeline

Trail networks are infrastructure which generate major economic value for New Zealand, yet they sit across four agency silos with no single strategic home. MBIE administers the $950m Ngā Haerenga / Great Rides programme; visitor spending on the 23 Great Rides reached NZ$1.28bn in

[36] Deloitte. (2022). The social and economic cost of physical inactivity in New Zealand. Sport New Zealand.
[37] NZ Story Group. (2024). Our Story: Open Spaces, Open Hearts, Open Minds. NZ Story (hosted by NZTE). https://www.nzstory.govt.nz
[38] Tourism New Zealand. (2024). Statement of Intent 2024–2028. Tourism New Zealand.
[39] Ministry of Business, Innovation and Employment. (2023). Tourism Industry Transformation Plan and related tourism strategy documents. MBIE.
[40] Ministry of Foreign Affairs and Trade. (2024). Strategic Intentions 2024–2028; and MFAT. (2023). Strategic Foreign Policy Assessment: Navigating a Shifting World. MFAT.
[41] New Zealand Trade and Enterprise. (2023). Briefing to the Incoming Minister, November 2023, pp. 17–18. NZTE.
[42] Department of Conservation. (2024). The Value of Public Conservation Land. DOC.

2024/25 and the number of trailside businesses grew by 81% since 2021.[43] DOC reports NZ$3.4bn per year in economic contribution from tourism on public conservation land.[44] Waka Kotahi funds the urban footpath and cycleway network through a $460m ring-fenced activity class in 2024-27, including a 25% floor on footpath spend.[45] Mountain biking on Crown Forest Licence land is estimated to contribute $291m per year.[46]

The strategic visibility of this spending is one-direction. MBIE's Going for Growth strategy (February 2025) is silent on trails, cycleways and recreation across all five pillars.[47] The Regional Infrastructure Fund, which exists to fund enabling infrastructure for regional economic development, lists its investment principles as water storage, energy, Māori economic development, enabling infrastructure and resilience. Trail networks (which Ngā Haerenga Evaluation 2021 and Patterson (2023) quantify as significant regional economic contributors) are not named. The Ngā Haerenga Design Guide 6th edition (2024) names its partners as the New Zealand Cycle Trail Incorporated Society, DOC, Waka Kotahi, councils, trusts and sponsors; Outdoor Access Commission/Herenga ā Nuku is absent.[48] Infrastructure Commission/Te Waihanga's National Infrastructure Plan 2026 sets out 16 recommendations and a named-project pipeline; none targets the trail network.[49] Trails generate demonstrable economic returns. The investment pipeline does not explicitly recognise them.

4.2.4 Urban densification is reshaping access without a corresponding investment in public walkability

Urban densification is a consequential force reshaping where New Zealanders can walk, cycle and experience open space. This is occurring as local authorities change zoning and urban plan settings both in response to local needs and central government policy direction. Examples include Auckland Unitary Plan, Hutt City Plan Change 56 and the National Policy Statement-Urban Development 2020. However, the agency with the lead policy mandate for urban form makes almost no reference to public outdoor access. Ministry of Housing and Urban Development's (HUD) Government Policy Statement on Housing and Urban Development 2025 names "thriving and resilient communities" as one of four outcomes under "well-functioning physical and community infrastructure... natural environment of towns and cities supports human health". Our systematic searches, however, return no substantive matches for outdoor access, public access, walking access, open space, green space, walkability or active transport.[50] The single occurrence of "parks" is in a descriptive list of local-government community infrastructure.

[43] Ministry of Business, Innovation and Employment. (2025). Ngā Haerenga New Zealand Cycle Trail evaluation. MBIE.
[44] Department of Conservation. (2024). Value of public conservation land. DOC.
[45] Ministry of Transport. (2024). Government Policy Statement on Land Transport 2024. MOT; NZ Transport Agency Waka Kotahi. (2024). National Land Transport Programme 2024-27. NZTA.
[46] Te Uru Rakau / Ministry for Primary Industries. (2023). Forestry and wood processing industry transformation plan. MPI.
[47] Ministry of Business, Innovation and Employment. (2025). Going for growth. MBIE.
[48] Ministry of Business, Innovation and Employment. (2024). Ngā Haerenga design guide (6th ed.). MBIE.
[49] NZ Infrastructure Commission Te Waihanga. (2026). National Infrastructure Plan 2026. Te Waihanga.
[50] Ministry of Housing and Urban Development. (2025). Government Policy Statement on Housing and Urban Development. HUD.

The NPS-UD's walkable-catchment construct is the closest implicit link, and it operates as an operational instrument rather than strategic recognition.[51] Waka Kotahi's Keeping Cities Moving mode-shift strategy and the six regional plans (Auckland, Tauranga, Hamilton, Wellington, Christchurch, Queenstown) relate to active modes, but sit operationally below the GPS-LT 2024 strategic priorities (economic growth, maintenance, safety, value for money). None of these documents name walking or cycling.[52] Densification is happening without a corresponding strategic commitment from housing or transport agencies to provide or identify tools to create the replacement walkable public realm. In Auckland, MfE reported a 20% decline in private green space between 2013 and 2021.[53] Neither HUD's Government Policy Statement on Housing and Urban Development 2025 nor Waka Kotahi's GPS-LT 2024 identifies public outdoor access as an instrument for managing that shift.

4.2.5 Māori access to whenua has no institutional home outside the Commission

Māori outdoor access issues have two features. First, there is an issue of general public access (Crown redress typically preserves public access through settlements). Second, Māori landowners face challenges with landlocked whenua (up to one-third of Māori land is landlocked).[54]

Te Tari Whakatau (formerly Te Arawhiti) administers Treaty settlements. The Red Book (the Crown's negotiations policy) references "public access" fourteen times as a standing Crown interest, preserved through easements, Reserves Act s38 transfers, DOC-retained marginal strips, statutory acknowledgements and co-governance regimes (Te Urewera, Waikato River, Te Kahui Tupua / Taranaki Maunga). Core doctrine requires balancing claimant aspirations against "continued protection of and public access to conservation areas".[55] However, Te Tari Whakatau's strategic narrative does not name outdoor access and there is limited reference to enabling access. The Māori Land Court, under Te Ture Whenua Māori Act 1993, can make landlocked-land orders to grant access to whenua Māori. This is a statutory access instrument with no direct home in any executive agency's strategic narrative.

Te Puni Kokiri's Whenua Māori programme administers the Crown workstream on landlocked Māori land and holds policy stewardship of Te Ture Whenua Māori Act 1993. The 2020 amendment to that Act contains a substantive access provision which requires courts to consider an applicant's relationship to whenua and water in landlocked cases.[56] Again, we found limited reference to access being enabled. Landlocked whenua prevents not only physical access to the land but also the flow of economic, social, environmental and health benefits that access would deliver to Māori landowners, whānau, and more broadly. This makes unlocking access to this land a key wellbeing as well as a property value question for Māori.

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[51] Ministry for the Environment. (2020, amended 2022, 2024). National Policy Statement on Urban Development. MfE.
[52] NZ Transport Agency Waka Kotahi. (n.d.). Keeping cities moving: Mode shift programme. NZTA; Ministry of Transport. (2024). Government Policy Statement on Land Transport 2024. MOT.
[53] Ministry for the Environment. (2024). Our land 2024. MfE.
[54] Herenga ā Nuku Aotearoa. (2026). State of public outdoor access report 2026. Herenga a Nuku.
[55] Office for Māori Crown Relations / Te Arawhiti. (2025). Ka tika a muri, ka tika a mua: Treaty of Waitangi Settlements - a manual for the Crown ('Red Book') (5th ed.). Te Arawhiti.
[56] Te Ture Whenua Māori Act 1993 (2020 amendment, ss 326A-326D).

4.2.6 The education curriculum depends on outdoor access but the strategic layer is silent

The Ministry of Education highlights a clear example of the gap between operational recognition and strategic silence on outdoor access. Across the Ministry's Strategic Intentions 2025-2029, its 2025 Annual Report, the Tertiary Education Strategy 2025-2030, NELP-TES 2020 and the School Property Strategy 2030, systematic text searches return zero matches for outdoor, EOTC, recreation, public or walking access, Outdoor Access Commission/Herenga a Nuku, tramping, camp or adventure.[57]

On the other hand, the New Zealand Curriculum Health and Physical Education learning area and the Education Outside the Classroom (EOTC) Guidelines Bringing the Curriculum Alive, the same search terms return more than 400 hits. EOTC Guidelines define outdoor education as "one of seven key areas of learning" covering "adventure activities, outdoor pursuits" (specifically tramping, kayaking, rafting, biking, orienteering, climbing and sailing).[58] Learning settings explicitly include "outdoor pursuit journeys in the 'back country'". Cross-references are made to DOC environmental care codes and the Mountain Safety Council. Outdoor Access Commission/Herenga ā Nuku is not named.

The New Zealand education system depends on public outdoor access for the delivery of a named, substantive curriculum area. The Ministry's reporting line to Ministers contains no outdoor-access signal. Ministry of Education allocates no capital budget to the outdoor infrastructure on which EOTC curriculum delivery depends. The practical implication is that any change in access supply (for instance, reduced DOC hut network, paid entry to national parks, the closure of a council-managed camp, a landlocked paper road) affects the curriculum. However, there is no accountability mechanism in the Ministry's strategic documents to highlight that risk.

4.2.7 Crown valuation tools price outdoor access but the investment pipeline does not see it

Outdoor access is one of the few public goods that the Crown's valuation framework can monetise. However, this valuation is only done at the tool level, and applied inconsistently. Treasury's Living Standards Framework names Environmental Amenity (including "green space, forests and parks... recreational facilities"), Leisure and Play, and Health ("keeping active") among the twelve wellbeing domains.[59] The CBAx tool treats outdoor recreation as a natural-capital value.[60] Waka Kotahi's Monetised Benefits and Costs Manual attaches per-kilometre dollar values to walking and cycling health benefits.[61]

These tools are used by analysts across government to price the wellbeing contribution of outdoor access in individual cost-benefit cases. None of them surfaces into the strategic instruments that

[57] Ministry of Education. (2025). Statement of intent 2025-2029. MoE; Ministry of Education. (2025). Annual report 2025. MoE; Ministry of Education. (2025). Tertiary education strategy 2025-2030. MoE; Ministry of Education. (2020). Statement of national education and learning priorities and tertiary education strategy. MoE.
[58] Ministry of Education. (2016). EOTC guidelines: Bringing the curriculum alive. MoE; Ministry of Education. (2007). The New Zealand curriculum (Health and Physical Education learning area). MoE.
[59] The Treasury. (2021). The Living Standards Framework 2021. Te Tai Ohanga.
[60] The Treasury. (2022). CBAx spreadsheet model: Guide for departments (October 2022). Te Tai Ohanga.
[61] NZ Transport Agency Waka Kotahi. (2024). Monetised benefits and costs manual (v1.7.2). NZTA.

shape investment at portfolio level. Infrastructure Commission/Te Waihanga's Rautaki Hanganga 2022-52 and the National Infrastructure Plan 2026 define infrastructure to include "public parks and green spaces" as social infrastructure (ie, outdoor access is part of the definition) but translate this into a pipeline containing one recreation example (the Memorial Park Recreation Hub, Tauranga) and zero of sixteen NIP recommendations that target outdoor access.[62] The investment pipeline therefore does not recognise the wellbeing contribution of outdoor access infrastructure (which is within the definition). Outdoor access moves through Crown decision-making in case-by-case cost-benefit analyses and never aggregates into a strategic investment signal.

5 Conclusion

The analysis leads to three key conclusions and recommended next steps:

5.1 The evidence is strong but under-used

The evidence base for outdoor public access is well established. International and New Zealand studies have measured the health, economic, social, and environmental value of outdoor access for decades, and the findings are consistent. This report gathers that evidence and illustrates it through two New Zealand case studies. The data is available. For example, the Kawatiri Coastal Trail's first-year actuals ($18 million of visitor spending in 12 months to March 2026, against an original 12-year projection of $18.2 million) are a recent New Zealand example of how access infrastructure delivers economic value at a scale that strategic narrative does not yet capture.

Visibility is missing. Four of nineteen agencies name outdoor access in their core strategic documents. The remaining fifteen either recognise it in operational tools and subsidiary documents without carrying it to the strategic level, or do not reference it at all. Outdoor access does not reliably surface in the documents that shape budgets, accountability, and investment.

5.2 The Commission has a strategic advantage with its cross-boundary role

The Commission is the only agency that sees outdoor access as its core function and works across the full set of land types on which it depends. Every other agency sees outdoor access through a sectoral lens. Where outdoor access cuts across sectors, as it does for Kawatiri, for production forests, for urban walkability, and for Education Outside the Classroom, the Commission is the agency with the standing to convene the conversation.

5.3 Deepen agency partnerships

The Commission does not have the capacity to engage at full depth with all 19 agencies simultaneously. This reinforces the case for sequenced priority partnerships, beginning with the

[62] NZ Infrastructure Commission Te Waihanga. (2022). Rautaki hanganga o Aotearoa / New Zealand infrastructure strategy 2022-2052. Te Waihanga; NZ Infrastructure Commission Te Waihanga. (2026). National Infrastructure Plan 2026. Te Waihanga.

relationships where the gap between operational role and strategic recognition is widest and the Commission's existing relationships are strongest.

Priority engagement with Infrastructure Commission

The Infrastructure Commission/Te Waihanga's Rautaki Hanganga 2022–52 and the National Infrastructure Plan 2026 already define social infrastructure to include public parks, green spaces, and active-mode infrastructure. The named investment pipeline and planning principles are not yet consistent with it. The Outdoor Access Commission and Te Waihanga share a cross-sector, cross-boundary mandate (Te Waihanga across infrastructure classes, the Commission across land types and landowner categories), which makes a partnership suited to the task. The Commission could persuade the Te Waihanga to embed outdoor access in infrastructure planning from the design stage, rather than retrofit it into completed projects. A joint workstream on a National Outdoor Access Plan, mirroring the structure of the National Infrastructure Plan, would be the natural output of that partnership.

In addition, we recommend approaching other partnerships/relationships in three tiers:

Tier 1 relationships

The Commission should deepen the existing relationships where the acknowledgement of outdoor access is "Explicit": DOC, LINZ, Sport NZ. These agencies already name outdoor access in their core strategic documents. The partnership opportunity is to uplift established working relationships into formal cross-agency agreements at the next Statement of Intent refresh.

- Sport NZ is a named partner under the Walking Access Act 2008 and already uses walking and cycling participation as headline indicators. A reference to the partnership in Sport NZ's next Statement of Intent would close a visible gap at low policy cost.
- DOC already names public access in its Conservation Act s6(e) function and reproduces it in its Strategic Intentions. A joint work programme on Great Walks, the conservation estate, and DOC's access-charging considerations would lock the Commission into DOC's operational planning.
- LINZ's Commissioner of Crown Lands names Herenga ā Nuku as a strategic partner in the CPLA Statement of Intent 2024–2029. Embedding the partnership in LINZ's umbrella Statement of Intent at its next refresh would complete the picture.

Tier 2 relationships

Close the strategic recognition gap where recognition is "Implicit": MBIE, Waka Kotahi, Te Uru Rākau, Health NZ. These agencies have strong operational engagement with outdoor access but do not reflect it in their strategic narrative.

- MBIE administers the $950 million Ngā Haerenga programme and the tourism strategy refresh cycle. Including the Commission in both processes would connect the programme line to the access layer that enables it.

- Waka Kotahi is the single largest funder of urban active-mode infrastructure. The next GPS-LT cycle begins in 2027–28 and the Commission should provide input to the urban walking and cycling strategy component.
- Te Uru Rākau, within MPI, stewards the Crown Forest Licence regime under which mountain biking in production forests generates $291 million in annual regional economic activity. The Commission could explore a joint engagement to give forestry concessionaires a clearer framework for recreational-access agreements.
- Health NZ and the Ministry of Health prescribe outdoor activity through Green Prescriptions and the Eating and Activity Guidelines. The Commission could seek out a mechanism that links Green Prescription delivery to the trail and track network to give health agencies a practical tool for the outdoor activity they already advocate.

Tier 3 relationships

Local Government New Zealand represents the councils that fund and manage most of the footpath, park, and urban green-space network. The Commission has no formal relationship with LGNZ at present. A joint briefing of LGNZ members on the Commission's functions and on the Walking Access Act 2008 would open a channel the Commission currently lacks.

The Ministry of Education is silent on outdoor access at the strategic level but delivers a named curriculum area (Education Outside the Classroom) that depends on it. A conversation about capital investment in outdoor learning infrastructure, and how that infrastructure intersects with DOC's and councils' networks, would begin to close that silence.

5.4 Recommended next steps

The Commission can act on these findings through its existing mandate and existing instruments. No statutory change is required. We suggest the Commission could:

- Brief the Commission’s responsible Minister on findings of the report and discuss benefits of the Commission leading an explicit “National Strategy for Outdoor Public Access” as a mechanism to lift visibility across agencies and coordinate delivery of the benefits this report has identified.
- Otherwise, use this report as a conversation starter with the “Explicit” recognition agencies (DOC, Sport NZ, LINZ) to identify where the next recognition step lies, and with the five priority “Implicit” agencies to open partnership conversations.
- Engage in the strategic-document cycles already in motion. The next Treasury Budget Policy Statement, Te Waihanga National Infrastructure Plan refresh, GPS-LT, and GPS-HUD are natural opportunities.
- Publish a concise version of the agency mapping summary table on the Commission's website. A one-page summary would assist officials in relevant agencies to see how the Commission's mandate connects to their own.

Appendix A: Methodology

Evidence review approach

The evidence review draws on 26 sources across four jurisdictions: the United Kingdom (including England and Wales), Scotland, Australia, and New Zealand.

Sources were identified through:

Outdoor Access Commission-provided reference materials (ministerial briefing documents, commissioned reports)
Published government reports and statistical accounts (ONS, NatureScot, Sport Australia, Sport NZ, DOC, MCH, MBIE)
Peer-reviewed and commissioned research (Patterson 2023, Griffiths et al 2023, Kaval and Yao 2007)
International evaluation reports (Angus and Associates 2022, BCG 2017, Marsden Jacob 2018)

Selection criteria:

Methodological rigour (established valuation methods, adequate sample sizes, transparent assumptions)
Data currency (preference for sources from 2020 onwards, with earlier landmark studies included for context)
Relevance to New Zealand policy context (comparable population, institutional framework, or outdoor culture)

Scotland was identified as the closest international comparator based on population scale (5.5 million vs 5.2 million), right-of-access legislation, outdoor recreation culture, and institutional parallels (NatureScot and the Outdoor Access Commission serve analogous functions).

Agency mapping approach

The three-tier classification (explicit, implicit, no recognition) was applied to fifteen government agencies selected on the basis of potential relevance to outdoor access. Agencies were identified through:

- Dan Wildy's Government Strategies Matrix (provided by the Outdoor Access Commission
- Walking Access Act 2008 and related legislation
- Cross-references in the evidence review

For each agency, the assessment examined:

- Founding or governing legislation
- Current strategic objectives (from Statements of Intent, Annual Reports, or published strategies)
- The reasoning chain connecting outdoor access to stated objectives
- The strength of the quantitative evidence supporting the connection
- Specific gaps or opportunities for the Outdoor Access Commission engagement

The classification benchmark is the Walking Access Act 2008 (s3): free, certain, enduring, and practical access to the outdoors. An agency is classified as "explicit" only if its legislation, strategy, or SOI directly names outdoor access, walking, cycling, trails, or recreation infrastructure as a function or objective.

Limitations

- The agency mapping relies on published strategic documents, which may not reflect internal priorities or informal relationships.
- Agency SOIs reviewed were (2024/25), later versions may reflect different information.
- The evidence review focuses on government-commissioned and literature sources most relevant to policy advocacy, not a systematic academic literature search.

Appendix B: Evidence source inventory

Author / Organisation	Year	Title	Publisher / Source
Natural England	2025	People and Nature Survey for England: Year 5 annual report (April 2024 – March 2025)	Natural England
NatureScot	2010	The economic impact of wildlife tourism in Scotland (Commissioned Report No. 398)	NatureScot (formerly Scottish Natural Heritage)
NatureScot	2024	Scotland's People and Nature Survey 2023/24	NatureScot
Office for National Statistics	2025	UK natural capital accounts	ONS
Parks Victoria	2015	Valuing Victoria's Parks: Accounting for ecosystems and valuing their benefits	Parks Victoria
Ravi, S. et al.	2022, 2023	Value of South Australia's national parks and reserves (Studies 1 and 2)	University of Adelaide, Centre for Global Food and Resources
Sport and Recreation Alliance & Leeds Beckett University	2026	Reconomics 3.0: The economic, health and social value of sport and recreation to the UK	Sport and Recreation Alliance
Sustrans Scotland	2019	National Walking and Cycling Network evaluation	Scottish Government / Sustrans
University of Exeter & Department for Environment, Food and Rural Affairs	2018	Outdoor Recreation Valuation Tool (ORVal)	University of Exeter / Defra
Angus & Associates	2021	2021 evaluation of Ngā Haerenga Great Rides of New Zealand	Ministry of Business, Innovation and Employment
Deloitte	2022	The social and economic cost of physical inactivity in New Zealand	Sport New Zealand
Department of Conservation	2024	Assessment of the value of public conservation land	DOC / Te Papa Atawhai
Herenga ā Nuku Aotearoa	2026	State of Public Outdoor Access Report 2026	Outdoor Access Commission
Infometrics	2024	Sport and recreation sector economic profile	Ministry for Culture and Heritage / Manatū Taonga

Ministry for the Environment	2022	Value of nature for wellbeing during times of crisis: COVID-19 case study	Ministry for the Environment / Manatū Mō Te Taiao
Ministry for the Environment	2024	Our Land 2024	Ministry for the Environment
Kawatiri Coastal Trail Trust	2026	Monthly survey report, 7 April 2026 (Get Smart visitor survey); supplemented by first-year operating data and named-operator anecdotes provided by Edee Richards, Trail Manager, by personal communication, 30 April 2026	Kawatiri Coastal Trail Trust
Patterson, B.	2023	Economic impacts of mountain biking in production forests in New Zealand	Benje Patterson | People & Places
Public Health Association of New Zealand	2024	Briefing to Incoming Government 2024	PHA
Sport New Zealand Ihi Aotearoa	2023	Active NZ participation trends 2017-2023	Sport New Zealand
Sport New Zealand Ihi Aotearoa	2024	The combined value of sport and active recreation in Aotearoa New Zealand	Sport New Zealand
Sport New Zealand Ihi Aotearoa	2025	Active NZ: Annual report on the 2024/25 New Zealand participation survey	Sport New Zealand
Health New Zealand | Te Whatu Ora	2024	Green Prescription programme specification (HP5088)	Health New Zealand
Health New Zealand | Te Whatu Ora	2024	Te Pae Waenga NZ Health Plan 2024-27	Health New Zealand
Ministry for Primary Industries | Te Uru Rākau	2023	New Zealand plantation forestry statistics 2022	MPI / Te Uru Rākau
Ministry for the Environment	2020	National Policy Statement on Urban Development (amended 2022, 2024)	Ministry for the Environment
Ministry of Business, Innovation and Employment	2023	Tourism Industry Transformation Plan and related tourism strategy documents	MBIE
Ministry of Business, Innovation and Employment	2024	Ngā Haerenga design guide (6th ed.)	MBIE
Ministry of Business, Innovation and Employment	2025	Going for Growth	MBIE
Ministry of Business, Innovation and Employment	2025	Ngā Haerenga New Zealand Cycle Trail evaluation	MBIE

Ministry of Education	2025	Statement of Intent 2025-2029; Annual Report 2025; Tertiary Education Strategy 2025-2030; NELP-TES 2020; School Property Strategy 2030	Ministry of Education
Ministry of Foreign Affairs and Trade	2023	Strategic Foreign Policy Assessment: Navigating a Shifting World	MFAT / Manatū Aorere
Ministry of Foreign Affairs and Trade	2024	Strategic Intentions 2024-2028	MFAT / Manatū Aorere
Ministry of Health	2020	Eating and Activity Guidelines for New Zealand adults	Manatū Hauora
Ministry of Housing and Urban Development	2025	Government Policy Statement on Housing and Urban Development	HUD / Te Tūāpapa Kura Kāinga
Ministry of Transport	2024	Government Policy Statement on Land Transport 2024	Ministry of Transport
New Zealand Trade and Enterprise	2023	Briefing to the Incoming Minister, November 2023	NZTE / Te Taurapa Tūhono
NZ Infrastructure Commission Te Waihanga	2022	Rautaki Hanganga o Aotearoa / New Zealand Infrastructure Strategy 2022-2052	Te Waihanga
NZ Infrastructure Commission Te Waihanga	2026	National Infrastructure Plan 2026	Te Waihanga
NZ Story Group	2024	Our Story: Open Spaces, Open Hearts, Open Minds	NZ Story (hosted by NZTE)
NZ Transport Agency Waka Kotahi	2024	Monetised Benefits and Costs Manual (v1.7.2)	NZTA
NZ Transport Agency Waka Kotahi	2024	National Land Transport Programme 2024-27	NZTA
NZ Transport Agency Waka Kotahi	n.d.	Keeping Cities Moving: Mode shift programme	NZTA
Office for Māori Crown Relations / Te Arawhiti	2025	Ka Tika a Muri, Ka Tika a Mua: Treaty of Waitangi Settlements — A Manual for the Crown ('Red Book') (5th ed.)	Te Arawhiti
Te Uru Rākau / Ministry for Primary Industries	2023	Forestry and Wood Processing Industry Transformation Plan	MPI
The Treasury	2021	The Living Standards Framework 2021	Te Tai Ōhanga
The Treasury	2022	CBAx spreadsheet model: Guide for departments (October 2022)	Te Tai Ōhanga
Tourism New Zealand	2024	Statement of Intent 2024-2028	Tourism New Zealand

New Zealand Government	2008	Walking Access Act 2008	NZ legislation
New Zealand Government	1993	Te Ture Whenua Māori Act 1993 (2020 amendment, ss 326A-326D)	NZ legislation
Ministry of Education	2007	The New Zealand Curriculum (Health and Physical Education learning area)	Ministry of Education
Ministry of Education	2016	EOTC Guidelines: Bringing the Curriculum Alive	Ministry of Education
Herenga ā Nuku Aotearoa	2021	Ministerial Zoom handout: Kawatiri Coastal Trail and Commission role	Outdoor Access Commission
Herenga ā Nuku Aotearoa	2021	Outdoor access is good for people and whenua	Outdoor Access Commission
Herenga ā Nuku Aotearoa	2021	Zoom meeting presentation speaking notes	Outdoor Access Commission
Herenga ā Nuku Aotearoa	2021	Our contribution to NZ's wellbeing	Outdoor Access Commission
Herenga ā Nuku Aotearoa	2021	Speaking notes for the Minister	Outdoor Access Commission
Herenga ā Nuku Aotearoa	2021-2025	Strategic Narrative 2021-2025	Outdoor Access Commission