

SOCIAL AND ECONOMIC IMPACT ASSESSMENT FOR THE GREAT TASTE TRAIL

Prepared for Nelson Tasman Cycle Trail Trust

March 2024



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INTRODUCTION

Background

The Nelson Tasman Cycle Trails Trust (The Trust / NTCTT) is creating great cycle trails for our communities. It aims to create and maintain unique, safe and diverse cycle trail experiences that showcase the best of the Nelson Tasman region for visitors and locals. The Trust is responsible for two cycle trails; Tasman's Great Taste Trail (GTT) and the Coppermine Trail. This report relates to the GTT only.

To support the Trust's approaches for funding, Angus & Associates was commissioned to undertake an independent social, economic and other health and wellbeing assessment of the benefits being gained from the GTT, drawing on primary research with trail users and secondary sources.

The approach to this work uses a framework similar to that developed by Angus & Associates for the 2021 Evaluation of Ngā Haerenga Great Rides of New Zealand. This reflects the Trust's objectives and resonates with the evaluation frameworks used increasingly by the central and local government stakeholders that the Trust may approach for funding. (A copy of the report for that evaluation is available here: <https://www.mbie.govt.nz/dmsdocument/19854-2021-evaluation-of-nga-haerenga-great-rides-of-new-zealand-pdf>.)

Objectives

The primary objective of this work was to understand and to demonstrate the value of the GTT to the Nelson / Tasman Region, from economic and from social perspectives. The Trust's particular focus was on understanding the health, wellbeing and other benefits of the GTT for local communities.

As key outputs, The Trust required:

- Evidence and a better understanding of how residents and local communities use, benefit from and value the GTT (both as users of the trail and stakeholders in the activity it supports or generates).
- Evidence and a better understanding of how the GTT benefits the Nelson / Tasman Region as a whole (both from an economic perspective – in relation to visitor expenditure and employment created and sustained – and other health and wellbeing impacts, where it is possible to assess these).

Approach

The research involved a mixed method approach, using a combination of desk and secondary research, stakeholder depth interviews, Ngā Haerenga New Zealand Cycle Trails Trail User Survey Trail User Survey Data (NZCT) and an on-trail intercept surveys (IS) with local users. An important focus of the intercept surveys was to gain a definitive understanding of the proportion of Local GTT users in a 'normal' year, without the impacts of Covid travel restrictions potentially skewing data collected over this time. (More detail on the research methodology is available in the Appendix.)

A group of four cyclists is riding on a paved path in a park-like setting. The path curves to the left. In the background, there is a large body of water, possibly a lake or reservoir, and a range of mountains under a clear sky. The cyclists are wearing helmets and athletic gear. The overall scene is bright and scenic.

SUMMARY SECTION

THE BIG PICTURE

- The Great Taste Trail (GTT) serves as a **vital recreational facility** within the Nelson Tasman District, particularly valued by the local population, and by older citizens. It is functioning as a hub for various activities such as exercise, social interaction, and leisurely pursuits, fostering community cohesion and well-being.
- The trail's core appeal lies in its inclusivity, **catering to a diverse array of users** ranging from families with young children to elderly individuals utilizing e-bikes. This inclusiveness ensures accessibility for all, contributing to its widespread popularity and integral role in the daily lives of residents.
- Beyond its recreational function, the GTT is **playing a pivotal role in environmental conservation**, notably reducing vehicular emissions and fostering a heightened appreciation for the natural surroundings. This is reflected in the trail's ability to raise awareness and promote stewardship of the local environment among its users.
- Economically, the trail is **servicing as a driver for the Nelson Tasman economy**, drawing in visitors who contribute to the region's economic vitality through expenditure on local businesses and services. Moreover, the trail's presence is **fostering opportunities for entrepreneurial ventures**, to enhance the taste element of the GTT and overall user experience.
- In addition to its economic impact, the GTT is **yielding substantial benefits for public health and well-being**, with reported improvements in physical fitness and mental well-being among users. Furthermore, the trail is fostering a sense of community spirit and connectivity, acting as a focal point for social interaction and engagement.
- Nevertheless, **the GTT faces challenges such as ensuring trail safety and addressing the needs of remote areas with limited facilities**. Despite these challenges, trail users, partners and stakeholders remain committed to the GTT, and offer many well-meaning suggestions to address pertinent issues to sustain its long-term viability and relevance.
- In summary, the Great Taste Trail stands as a **cornerstone of recreational, environmental, and economic significance within the Nelson Tasman District**, epitomizing the region's commitment to sustainable development and community well-being.



KEY INSIGHTS

Value Perception

There is compelling evidence to demonstrate how important cycling and cycling-related infrastructure (The GTT) is for both residents and visitors to the Nelson Tasman District. Cycling is valued and enjoyed by the Nelson Tasman community, a sought-after activity by visitors and encouraged by local government agencies.

As well as the economic contribution made by the GTT, there are a wide range of 'felt social, human, and natural benefits' for residents of the Nelson Tasman District. The GTT is highly valued by the community; usage of the trail has improved their physical health, their mental health and wellbeing, and increased their appreciation of the natural environment. Jobs, community and social engagement, ecological restoration, health, wellbeing, and local pride are all emerging positives of cycle trails generally (and the GTT specifically).

Trail users, stakeholders and partners are optimistic about the future and potential for the GTT, with many believing there are multiple opportunities to improve the trail experience (for users) and the GTT's impact on the Nelson Tasman District.

The GTT is well positioned to capitalize on the popularity of cycling as an outdoor recreation activity and the growth of cycle tourism; this is already being realised as evidenced by counter data. The total individual trail counts (*) recorded on the GTT for the year ended 30 June 2023 was 419,217 (including over 90,000 pedestrians). This is an increase of 6.5% when compared with the 393,766 (including over 111,000 pedestrians) individual trail counts for the year ended 30 June 2022 and a significant 24.2% increase when compared with the 337,517 (including over 80,000 pedestrians) individual trail counts between March 2019 to February 2020 (**).

(*) Total individual trail counts do not equate to total trips or individual users. A count is when a rider/pedestrian passes a trail counter.

(**) Data for the YE 30 June 2020 will be skewed by COVID 19 restrictions. Therefore, data for the YE 28 Feb 2020 has been used instead, as it is the nearest comparable annual data.

KEY INSIGHTS [CONT.]

Trail Users

- Cycling is New Zealand's third most popular sport / recreational pastime and is accessible across all demographics and abilities.
- Cycling is more popular across all age groups in Nelson Tasman than in many other parts of New Zealand; 52% of adults have cycled in the last 12 months (compared with 32% of all New Zealanders).
- Nelson Tasman has an older age profile when compared with the rest of New Zealand, and a higher proportion of older people who cycle and who enjoy many cycling-related health (and other) benefits provided by the GTT.
- Electric bikes are supporting more (and older) cyclists to continue to participate in cycling (exercise and the community) for longer.
- Walking is New Zealand's most popular outdoor recreational pastime – around a fifth of GTT users run, walk or hike the trail.
- Majority of people using the GTT are local users. (89% - Intercept Survey).
- The majority of local users in the NZCT survey are highly satisfied with the GTT and would recommend it to others.

See the Trail Usage section of this Report for more in-depth findings.

Human and Social Capital

- The GTT is a regularly used community resource for exercising, socialising, relaxing, commuting, learning about and being in nature. Over half of local users are using the trail weekly, or more often, and users feel fitter, and have an improved sense of wellbeing and mental health. (IS)
- The top four community impacts identified by local trail users (IS) are
 1. The GTT is valued by the local community
 2. Improves the quality of life in Nelson Tasman
 3. Makes Nelson Tasman a more vibrant or appealing place to live,
 4. Is accessible to a wide range of people.
- There is also strong agreement that the GTT has increased the profile of Nelson Tasman and is a source of pride for the local community.
- The GTT has generated and encouraged a huge amount of volunteer input; totally more than \$700,000 over the past 12 years.
- Crashes involving cyclists have a high social cost in New Zealand, and the GTT is a safe and convenient recreation and active transport option. There have been roading and crossing improvements to make the GTT safer for users (and more are planned). Having a safe space to recreate (cycle and walk) is particularly valuable in rural areas with no footpaths and narrow, dangerous roads. New infrastructure (bridges / crossings) on the trail and roads have linked communities and benefited trail users. The GTT can be used more regularly throughout the year than other outdoor facilities in the district. (Stakeholder interviews).

KEY INSIGHTS [CONT.]

Human and Social Capital [cont.]

- Using NZTA values calculated for new cyclists using conventional and electric assisted cycles, there are potentially significant health and mental health savings for the Nelson Tasman District, if more people can be encouraged to cycle regularly; even for short distances.

Natural Capital

- Domestic (Waka Kotahi, Ngā Haerenga New Zealand Cycle Trails, UCLA) and International (IPSOS) studies describe and confirm the environmental benefits of cycling, including reduced vehicle kilometres and vehicles on the road, fuel savings, reduced greenhouse gas emissions / lighter carbon footprint, cleaner air, reduced health damaging pollutants and less noise pollution.
- 35% of local users use the GTT to experience or learn about the natural environment (IS) and a majority of trail users agree the GTT is creating greater appreciation and understanding of the area's natural environment (NZCT).
- After using the GTT, users are more determined to protect it (NZCT), while usage has encouraged some to consider cycling / walking as a regular form of transport (NZCT) (which also has an environmental benefit).
- 41% of Local Residents appreciate the natural environment more, 25% are more determined to protect the natural environment and 18% apiece understand more about the natural environment and are conscious of their impact on the natural environment. 12% say they are more likely to cycle as an everyday form of transport. (IS)

Financial Capital

- The GTT provides significant economic benefit for the District. GTT users, who visited the Nelson Tasman region solely or primarily to use the trail, spent an average of \$262 per night and stayed an average of 6.4 nights, equating to approximate economic benefit of \$1,679 per visitor and an estimated total economic benefit to the Nelson Tasman Region of over \$34 million (Year ended June 2023).(*)
- There are around 70 official partners and many other local businesses that derive direct economic benefit from the GTT.
- Across the wider Nelson Tasman region, there are approximately 700 Accommodation and Food Service Businesses (4.8% of 14,565 businesses in the region), including approximately 23 wineries, 10 Craft Breweries, three distilleries and three Farmer's Markets serving Local Users and Visitors alike. There are at least 200 cafes (and other hospitality venues) within easy access of the GTT. (Visitors spend approximately 48% of their expenditure in the region on Food (22%) and Accommodation (26%). 68% of Local Users, who make up 89% of GTT Users, had used Food and Beverage Services on their last use of the GTT. Furthermore, there are at least 20 bike related businesses (hire, repair, retailing, guiding, shuttles/transport) in the region. (Approximately 45% of visitor expenditure is on cycle / cycle trail specific costs such as bike hire and Cycle Trail Tours.) Visitors are also spending money on transport, fuel, visiting other attractions and attending events.

Further details on the assessment of the GTT against the four capitals can be found in later sections of this report.

(*) Calculated using Counter Data, NZCT Expenditure Data and Intercept Survey Data.

TRAIL USAGE SUMMARY

From Intercept Survey

Demographics / Trail User Profile

- 89% of trail users who completed the intercept survey (IS) were Local Users.
- Local users include 51% male, 47% female and 1% gender diverse residents. (1% prefer not to say.)
- 95% of local users are New Zealand/Pakeha, 2% are Māori, 1% are another Pacific Island nationality and 5% are from other ethnicities.
- Residents aged 60–79 years, comprise 55% of local users.
- More than three-quarters of local users (77%) are aged 50+.
- Local users mostly travel in groups of 2-3 adults.
- Over half of local users - 56% - live in the Nelson, Stoke, Tahuna area, while around a quarter (27%) live in the Richmond area and 16% in Moutere-Waimea.

Mode of Transport

- 43% of local users rode an e-bike/e-mountain bike the last time they used the GTT, followed by 12% who used a mountain bike, 14% a road/standard bike and 19% who walked (17%) or ran (2%). 7% used a gravel bike.
- 88% of e-bike/e-mountain bike users are aged 50+ years.

Frequency of use

- The GTT has a high level of repeat use by locals. 57% of local users had used the GTT more than 50 times during the last 12 months; 17% had used it more than 200 times.
- For 4% of local users, this had been their first time using the GTT, whilst 14% had used it between two and ten times and 17%, 21-50 times.
- 54% of e-bike / e-mountain bike users had ridden on the trail more than 50 times in the last twelve months.
- 27% of local users who had used the trail more than 200 times during the last 12 months had used it to commute.

Reasons for Use

- 85% of local users had used the trail for exercise. This figure was 90% for local users aged 60+.
- 71% had used it for relaxation, 60% to spend time / socialise with friends or family, while over a third (35% apiece) had used it to escape the pressures of daily life, experience or learn about the natural environment, and to commute to / from school or work.
- 65% of those cycling using an e-bike / e-mountain bike, were using the GTT to spend time / socialise with friends or family.
- Of the high use GTT users (more than 50 times in past year), 76% had used it to commute, 64% for relaxation, 64% to escape the pressures of daily life, 58% to spend time / socialize with friends or family, 57% for exercise, and 53% to experience or learn about the natural environment.

TRAIL USAGE SUMMARY

From NZCT Survey

Satisfaction

- Trail users overall express very high levels of satisfaction with their trail experience, with 92% rating their experience 7, 8, 9 or 10 (out of 10). 91% of Local Residents rate their experience 7, 8, 9 or 10 (out of 10).
- 94% of Local Residents and 93% of All Trail users rate their propensity to recommend the GTT 7, 8, 9 or 10 (out of 10).
- A very low proportion of trail users – 3% of All Users and Local residents are dissatisfied with the experience.
- A very low proportion of users - 6% of Local Residents and 7% of All Trail Users - are unlikely to recommend the trail.

Effects of Trail Experience (Health and Reported Benefits)

70% of Local Residents claimed their physical fitness had improved because of using the trail and 61% that their sense of wellbeing or mental health had improved.

Furthermore, of Local Resident users:

- 41% said they appreciated the natural environment more;
- 33% had developed a closer relationship with the people they were with;
- 25% said they were more determined to protect the natural environment; and,
- 24% had developed or improved their skills.

Economic Benefits

The GTT generates significant economic benefit for the Nelson Tasman District. Visitors to the Nelson Tasman region solely or primarily to use the GTT, spent an average of \$262 per night and stayed an average of 6.4 nights.

This equates to approximate economic benefit of \$1,679 per visitor and an estimated total economic benefit to the Nelson Tasman Region of over \$34 million (Year ended June 2023).

68% of Local Residents, who comprise 89% of GTT users, had used Food and Beverage Services on their last use of the GTT.

Summary

The GTT serves as a vital asset for residents of the Nelson Tasman district, who are the primary users of the trail and are high repeat users.

The frequency of GTT usage among locals underscores its integral role in their daily lives, with a significant portion utilising it for both recreation and commuting purposes, alleviating traffic congestion.

There is widespread agreement of the GTT's positive influence on the local community, particularly in enhancing the overall quality of life and making the region more vibrant and accessible to people of all abilities.

All GTT users (visitors and locals) express exceptionally high levels of satisfaction with their experience, highlighting its convenience, proximity to urban centres, and extensive network connections. The GTT is not just a recreational asset but also a catalyst for community well-being and connectivity in Nelson/Tasman.

SOCIAL CAPITAL



Local Users

89% (IS)



94% agree that the GTT is valued by the local community.

93% agree it is Improving quality of life in Nelson / Tasman.

91% agree it is making Nelson / Tasman a more vibrant or appealing place to live.



NZ Residents

96% (IS)

Across the GTT



(Estimated) 1300 volunteer hours given in past 12 months



(Estimated) \$65,000 value of voluntary contributions per annum



As a result of Local Users' GTT experience ...

61% improved their sense of wellbeing or mental health (NZCT)

70% improved their physical fitness (NZCT)

33% developed a closer relationship with the people they were with (NZCT)

HUMAN CAPITAL

NATURAL CAPITAL



91% of Local residents rated their GTT experience, and 94% rated their propensity to recommend the GTT, 7, 8, 9, or 10 (out of 10) (NZCT)

As a result of their GTT experience ...

41% appreciate the natural environment more (NZCT)



18% understand more about the natural environment (NZCT)



35% use the GTT to experience/ learn about the natural environment (IS)



25% are more determined to protect the natural environment (NZCT)



68% ... of Local residents are using F&B services on the GTT (NZCT)

Cyclists who visited the Nelson Tasman Region solely or primarily to use the GTT (NZCT) (YE June 2023) ...



6.4 nights
Average length of stay



\$262
Average spend/night



\$1,679
Approximate economic benefit/visitor



\$34 million
Estimated Economic impact

FINANCIAL CAPITAL

STAKEHOLDER INTERVIEWS - KEY FINDINGS

Appeal

The main attraction of the GTT is that it is accessible and in near proximity to the urban centres of Nelson and Tasman and gives users access to a wide cycle trail network.

The flat, wide, well surfaced aspect of some of the GTT means it is accessible to a wide variety of users; from babies (being towed) to the elderly (on e-Bikes); and a wide variety of uses, from socialising and commuting to training for events.

The GTT is free, provides opportunities for physical activity in a safe space and for socialising in the fresh air and in nature. Other trail users are generally polite, the views and the scenery are varied and interesting, there are historical and cultural elements to enjoy, and the trail is being continually updated and improved.

Some could not name a specific highlight and enjoy the holistic, all-round experience, while others thank the NTCTT (and other volunteers / groups) who make the GTT possible.

Opportunities

The NTCTT Strategic Framework 2020-2025 clearly identifies their Strategic Goals and Priorities for the GTT. The following 'opportunities', were put forward by research participants without knowledge or understanding of these. They are presented as suggestions from trail supporters and advocates who are eager to see the GTT (and/or their personal enjoyment) optimised.

Users felt their enjoyment of the GTT could be further by improved safety and rideability (surface), more and improved facilities and infrastructure, and more services supporting the GTT, specifically the TASTE element.

Stakeholders and official partners are extremely positive toward and supportive of the GTT and cognizant of the challenges facing the NTCTT and the GTT. They acknowledge that the trail is continually improving and evolving and applaud the hard work and commitment of the NTCTT and other volunteers. However, they worry that the GTT branding is a little misleading and believe there is still significant opportunity to grow and develop the GTT.

Suggestions encompass the four well beings, and include more marketing and communication, to build local awareness, pride and ownership of the GTT, more information (both on and off trail, including more panels, maps and storytelling) and trail development (infrastructure, maintenance and facilities).

- **Human opportunities** include improved safety and access for all users (including wheelchairs and adapted bikes), and more activities on / linked to the trail.
- **Community opportunities** include more community engagement, more interweaving more community connections (stories) and encouraging more community pride and responsibility (volunteering).
- **Economic opportunities** include monetizing the trail (for those who can afford or choose to spend), including more and improved signage to businesses on the trail, capitalising on the Great Rides connection, more and improved services, more collaboration and cross selling between businesses and educating Local Users of the earning potential of their homes.
- **Environmental opportunities** include a more concerted and coordinated approach to reduce waste across all those associated with the trail, water maps, improved commuting opportunities, community (business and schools) planting, weeding, trapping days, and regenerative and eco-tourism.

STAKEHOLDER INTERVIEWS - KEY FINDINGS [CONT.]

Risks and Challenges

Stakeholders and official partners do not under-estimate the challenges facing the GTT in this difficult and competitive economic climate, where there are multiple organisations competing for financial and other resources.

Key concerns include:

- There is a risk of the inland loop potentially becoming a White Elephant as there is not much there (to encourage people to visit).
- Managing (some) negative local community sentiment is time consuming and diverts energy and resources away from key trail tasks.
- Sections of the trail are very remote, with few facilities (water, food) and poor communication, which have safety implications for trail users.
- High and ongoing costs of maintaining and keeping the trail safe, exacerbated by extreme weather events.
- Some fear that the GTT could lose its Great Ride status if its full potential is not optimized.

NB. These concerns are based on perceptions and observations only and are not necessarily based on robust evidence. But they are genuinely held views and are included here so the NTCTT is aware of them and can address them.

FACTS AND FIGURES SUMMARY

The table below and overleaf summarises key data findings from this research:

	Source		Value
Trail Usage - locals	IS	Live in the Nelson Tasman District.	89%
		Used the GTT more than 50 times during the last 12 months.	57%
		Used the GTT more than 200 times in the last 12 months.	17%
		Cycled (or rode) on their last GTT experience.	81%
		Walked, ran or hiked on their last GTT experience.	19%
		Used an e-bike on their last experience on the GTT.	43%
		Users aged 50+ years.	77%
		E-bike users aged 50+.	88%
		Users aged 50+ who had ridden on the trail more than 50 times in the last 12 months.	52%
Users aged 50+ who used the GTT for exercise.	80%		
Social (Community) Impacts	IS	Top three community impacts: Local Users who agree the GTT ...	94%
		<ul style="list-style-type: none"> Is valued by the local community Is improving quality of life in Nelson / Tasman. Is making Nelson / Tasman a more vibrant or appealing place to live. 	93%
			91%
	SSP	Volunteer trustees and other volunteer hours given to the GTT (YE June 2023).	Est. 1,300
		Monetary value of voluntary contribution/construction time/ materials given to the GTT (YE June 2023).	Est \$65,000
Human Impacts	NZCT	Local residents who are highly satisfied with their trail experience.	91%
		Local residents who rate their propensity to recommend the trail as 7, 8, 9 or 10 (out of 10).	94%
	Secondary Data	The benefits of cycling (exercise) include improved physical and mental health, cost and time savings, social connectivity, and reduced work absences.	
		Regular physical activity is especially beneficial for older people as it helps them to maintain good health, improves their quality of life, and increase their overall well-being and cycling is particularly well-suited to older people.	
		Nelson Tasman's older age profile and high dependency rating means there are significant community and other advantages in supporting older people to stay healthy for as long as possible.	
		The GTT is supporting older residents to participate in regular exercise, and benefit from a many health, physical, community and other benefits, as a result.	

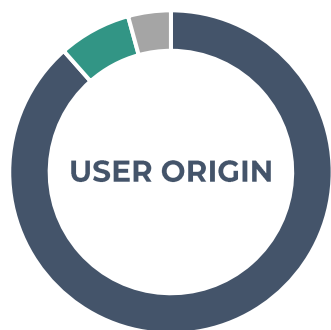
FACTS AND FIGURES SUMMARY [CONT.]

	Source		Value
Human Impact (cont.)	Secondary Data	There are significant social cost savings from safer cycling infrastructure (cycle trails) in New Zealand and monetary physical and health values for those who have already switched (or are who planning to switch) to cycling.	
	IS	Use the GTT for exercise.	85%
		Use the GTT for relaxation, socialising with friends or family, escaping the pressures of daily life, experiencing, or learning about the natural environment or for commuting.	35-71%
	NZCT	Claim their physical fitness has improved.	70%
		Claim their sense of wellbeing or mental health has improved.	61%
		Developed a closer relationship with the people they were with.	33%
		Improved their skills.	24%
Natural Capital	Secondary Data	Environmental benefits of cycling include reduced vehicle kilometres and vehicles on the road, fuel savings, reduced greenhouse gas emissions / lighter carbon footprint, cleaner air, reduced health damaging pollutants and less noise pollution.	
	IS	Use the GTT to experience or learn about the natural environment.	35%
		Agree the GTT is creating greater understanding of the area's natural environment.	82%
	NZCT	Appreciate the natural environment more.	41%
		Are more determined to protect the natural environment.	25%
		Understand more about the natural environment and are conscious of their impact on the natural environment.	18%
		Say they are more likely to cycle as an everyday form of transport.	12%
Economic / Financial Impacts (Visitors to the Nelson Tasman Region solely or primarily to use the GTT)	NZCT	Average spend per night	\$262
		Average length of stay	6.4 nights
		Approximate economic benefit per visitor	\$1,679
		Estimated economic benefit to the Nelson Tasman District (July 22 to June 23)	\$34 million (*)
		Estimated visitor nights (July 22 to June 23)	129,968 (*)
		Resident users who used Food and Beverage Services on the GTT	68%
		(*) Calculated using NZCT Expenditure Data Cross Tabulated with Intercept Survey User Data	

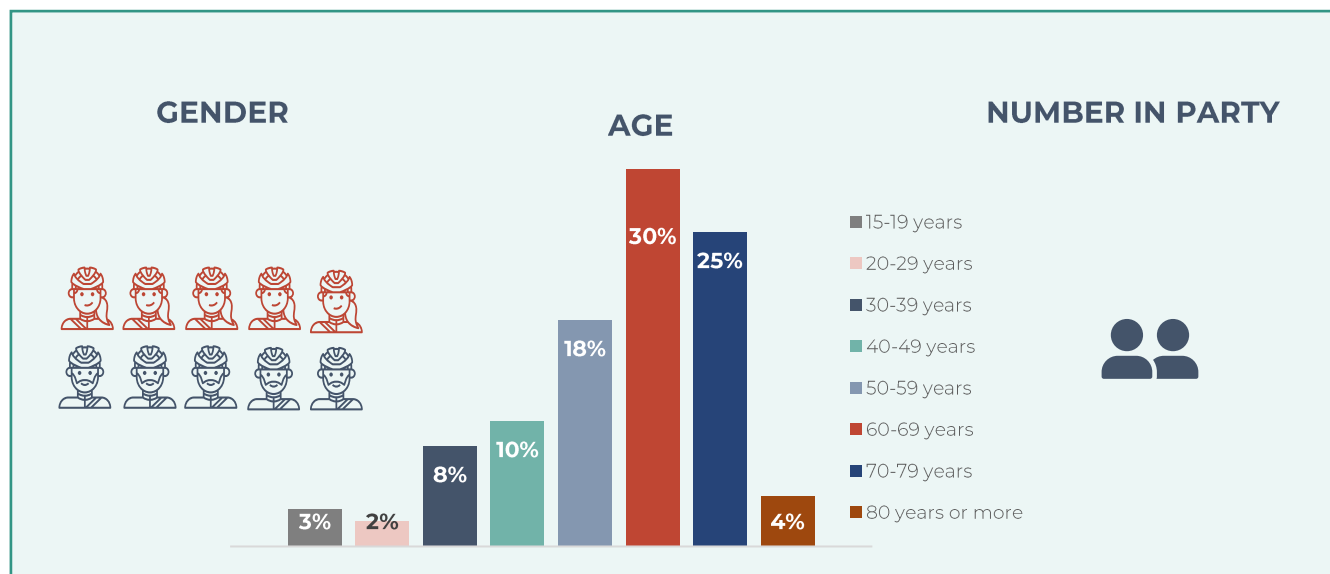
TRAIL USAGE

A photograph of four cyclists riding on a paved trail. The cyclists are wearing helmets and athletic gear. The trail is paved and has white lane markings. In the background, there is a grassy field, a body of water, and hills. The image is overlaid with a semi-transparent blue filter.

TRAIL USER PROFILE



- The GTT is primarily used by Local Users and a small number of domestic and international visitors; 89% of trail users who completed the intercept survey were Local Users (lived in the Nelson Tasman District); 7% were domestic and 4% were international visitors.
- 51% of Local Users are male, 47% are female and 1% are gender diverse. (1% prefer not to say.)
- The GTT is primarily used by the 60–79-year age group, who comprise the majority - 55% - of Local Users. 77% of Local Users are aged 50+.
- Local Users mostly travel in groups of 2-3 adults over the age of 15 years.
- 56% of Local Users live in the Nelson, Stoke, Tahuna area, while 27% live in the Richmond area and 16% in Moutere-Waimea.

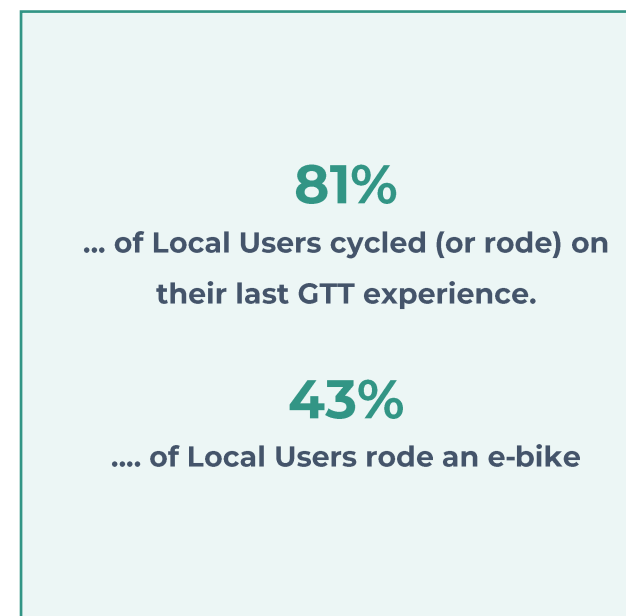


TRAVEL MODE

- E-bikes account for over two fifths of journeys taken on the GTT, with 43% of Local Users riding an e-bike/e-mountain bike on their last trail experience.
- 88% of e-bike/e-mountain bike users are aged 50+.
- 26% of users rode standard road (14%) or mountain (12%) bikes, while 19% walked/ hiked (17%) or ran (2%) on the GTT.

TRANSPORT TYPE

	Local Users
Cycling, using a road/standard bike	14%
Cycling, using a mountain bike	12%
Cycling, using an e-bike/e-mountain bike	43%
Cycling, using a hybrid bike	2%
Cycling, using a bike modified for someone with a disability	1%
Cycling using a gravel bike	7%
Walking/hiking	17%
Running	2%
Other (please specify) e.g. using a tandem bike/folding bike/mobility scooter. etc.	2%
Base:	n=270



Source: Intercept Survey (n=270)

GREAT TASTE TRAIL SOCIAL AND ECONOMIC IMPACT ASSESSMENT

USAGE IN THE LAST 12 MONTHS

- The GTT is frequently used by many Local Users, with 40% using it 51-199 times during the last 12 months, and a further 17% using it more than 200 times.
- 76% of Local Users who have used the GTT more than 50 times in the last 12 months, used it for commuting, 64% for relaxation or to escape the pressures of daily life, 58% to spend time / socialize with friends or family, 57% for exercise, and 53% to experience or learn about the natural environment.
- 27% of those who used the GTT 200 time or more in the last 12 months used it to commute and between 16-18% apiece to exercise, relax, escape the pressures of daily life or to spend time/socialise with friends and family.
- 54% of E-bike / e–mountain bike users have used the GTT more than 50 times (in the last twelve months).
- 52% of local users aged 50+ have used the trail more than 50 times in the last twelve months.

PREVIOUS GREAT TASTE TRAIL EXPERIENCE

	Local Trail Users
This is / was the first time	4%
Two to five times	8%
Six to ten times	6%
11 to 20 times	9%
21 to 50 times	17%
51-199 times	40%
200 times or more a year	17%
Don't know / can't recall	0%
Base:	n=270



57%
 ... of Local Users have used the GTT
 more than 50 times in the past
 twelve months.

17%
 ... Of Local Users have used it more
 than 200 times.


Source: Intercept Survey (n=270)

REASON FOR USE

- Cycling has been proven to have substantial physical and mental health benefits, including helping to reduce heart disease, cancer, diabetes and early death.
- The most common reason for using the GTT is for exercise; 85% of Local Users did so on their last experience, including 90% of Local Users aged 60+ years.
- 71% of Local Users use the GTT for relaxation and 60% to spend time / socialise with friends or family, while over a third (35% apiece) use it to escape the pressures of daily life, experience or learn about the natural environment, or to commute to / from school or work.
- 65% of Local e-bike / e-mountain bike Users use the GTT to spend time / socialise with friends or family.

Reason for Use	Local Users
For exercise	85%
For relaxation	71%
To spend time/socialise with friends or family	60%
To escape the pressures of daily life	35%
To experience or learn about the natural environment	35%
To commute to / from school or work	35%
To experience or learn about local culture and heritage	11%
To train for an event	10%
Sightseeing	8%
For a cycling holiday	7%
Bikepacking	5%
For a walking holiday	2%
Other	4%
Base:	n=270





85%
... of Local Users use the GTT for exercise.

90%
... of Local Users aged 60+ do so.

TRAIL USE BY SECTION

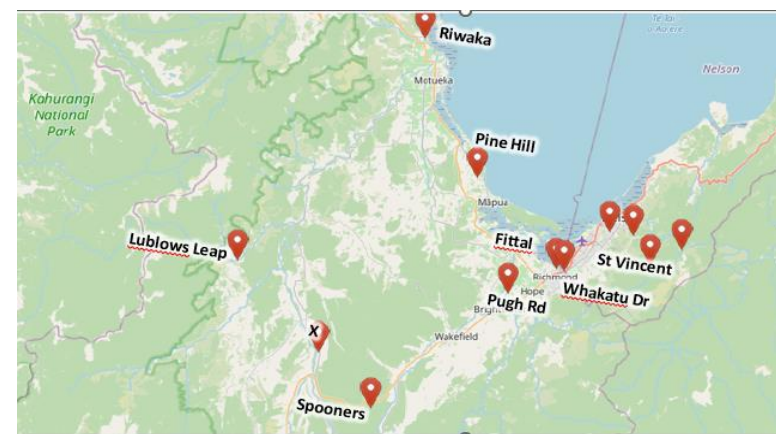
- The most used section of the trail for All Trail Users is the Richmond to Mapua section with 65% using this section on their last trail experience.
- This is followed by Nelson to Richmond (58%), Mapua to Motueka (52%), Wakefield to Richmond (49%) and Kohatu to Wakefield and Motueka to Riwaka (48% apiece) sections.
- The least used sections of the trail by All Trail Users are Tapawera to Riwaka (33%) and Riwaka to Kaiteriteri (31%) sections.

TRAIL SECTIONS USED

	Total Sample
Nelson to Richmond (11km)	58%
Richmond to Mapua (15km)	65%
Mapua to Motueka (33km)	52%
Motueka to Riwaka (10km)	48%
Tapawera to Kohatu (8km)	39%
Kohatu to Wakefield (25km)	48%
Wakefield to Richmond (17km)	49%
Riwaka to Kaiteriteri (6km)	31%
Tapawera to Riwaka (51km)	33%
Base:	n=564



riding the trail



Source: Ngā Haerenga New Zealand Cycle Trails Trail User Survey – Total sample all users July 2021-June 2023
Total users n=564 Local Users n=266

GREAT TASTE TRAIL SOCIAL AND ECONOMIC IMPACT ASSESSMENT

CYCLING TRENDS

- New Zealand's cycle trails are gaining popularity, bringing economic benefits and promoting public health. They have bolstered New Zealand's tourism industry, attracting diverse travelers seeking healthy and environmentally friendly experiences.
- Positive trends in cycle tourism, particularly focusing on the 23 Great Rides in the Ngā Haerenga network, include a 10.3% increase in trail usage, reaching nearly 2.19 million trips in the year to June 2021 (despite pandemic restrictions restricting international visitor numbers; this was more than made up for in the growth of domestic users). Visitor nights along the trails rose by 18%, contributing to a 31% growth in economic activity, totaling \$951m.
- Around 27% of Kiwi adults (and 21% of Australian adults) participate in cycling and offer potential for further growth for local user, domestic and international traveler usage (markets).
- Sustainable travel is on the rise, with tourists favoring biking to explore while reducing their carbon footprint, while bikepacking appeals to adventurers, capitalizing on the diverse cycle experiences available.
- Investment in cycling infrastructure and safety initiatives has enhanced accessibility for all cyclists, while E-bikes have broadened participation, making cycling more inclusive.

- Cultural and culinary experiences are integrated into tours, offering a holistic exploration. Customized and self-guided tours cater to independent travelers.

The GTT is well positioned to capitalize on the popularity of cycling as an outdoor recreation activity and the growth of cycle tourism:

- **Individual trail counts (*) recorded on the GTT** to the year ended 30 June 2023 were 419,217 (including over 90,000 pedestrians.)
- This is a 6.5% increase compared with year ended 30 June 2022, when there were 393,766 **individual trail counts** recorded (including over 111,000 pedestrians.)
- It is a significant 24% increase when compared with **individual trail counts** recorded between March 2019 to February 2020 (**), when a **total** of 337,517 **individual trail counts** were recorded (including over 80,000 pedestrians.)

(*) Total individual trail counts do not equate to total trips or individual users. A count is when a rider/pedestrian passes a trail counter.

(**) Data for the YE 30 June 2020 will be skewed by COVID 19 restrictions. Therefore, data for the YE 28 Feb 2020 has been used instead, as it is the nearest comparable annual data.

Sources:
GTT Trail Counter Data and Intercept Survey
The 2021 Evaluation of Ngā Haerenga Great Rides and the New Zealand Cycle Trails
Cycle Tourism Insights Research Report



INDICATORS OF CONTRIBUTION TO

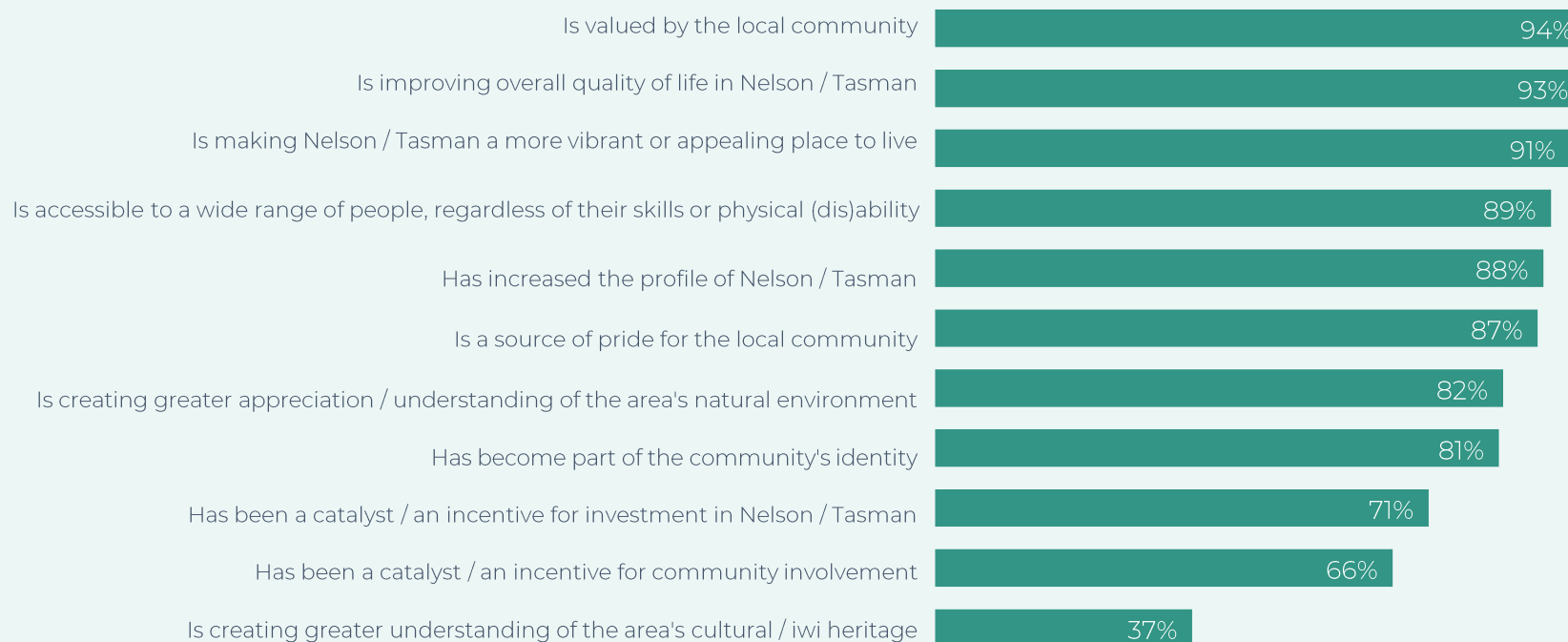
SOCIAL CAPITAL

Social Capital is the norms, rules and institutions that influence the way in which people live and work together and experience a sense of belonging. It includes trust, reciprocity, the rule of law, cultural and community identity, traditions and customs, common values and interests.

COMMUNITY SUPPORT

- Local Users were shown a set of community impact statements and asked to identify to what extent they agreed or disagreed with them, using a five-point scale.
- All but one scored highly, with at least two thirds of Local Users agreeing with the statement.
- There was highest agreement that the GTT is valued by the local community, improving the overall quality of life in Nelson Tasman, and making Nelson Tasman a more vibrant or appealing place to live.
- There was least agreement that the GTT is creating greater understanding of the area's cultural / iwi heritage.

% WHO AGREE THAT GREAT TASTE TRAIL...



Source: Intercept Survey (n=270)

VOLUNTEER CONTRIBUTION

For the year ending June 2023, volunteers contributed 1,300 hours. In 2022, volunteers gave 1,450 hours, and in 2021 volunteers gave 1,145 hours.

The monetary value of construction time/materials was \$7,360 in 2023, \$1,575 in 2022 and \$6,450 in 2021.

Considerable other volunteer input is being put into trail maintenance (including planting, weeding and pest control) that is not recorded by the Trust.

3,895 hours

**Given by volunteers over the past
three years conservatively valued
at \$194,750 (*)**

\$15,385

**Monetary value of construction
time/materials over the past
three years.**

(*) Hourly rate being used to estimate Trustee and volunteer time is \$50

ORGANISATIONS SUPPORTING THE TRUST FINANCIALLY OR AS VOLUNTEERS



- Nelson Airport
- Ewings Poultry
- OneFortyOne Forests
- Rata Foundation
- DOC
- Heritage NZ
- Rail Heritage NZ
- Tapawera Historical Society
- Tapawera Community Association
- Nelson Mountain Bike Club
- Other local mountain bike groups
- Secondary Schools
- Service Clubs
- LINZ
- Many professional staff offering services at substantially reduced rates.

FUNDING AND DONATIONS

- Since 2010, the trail has received \$6,700,039 in funding from MBIE. The funding has been for trail construction, extreme events recovery, major and minor enhancement and Opex.
- Matching funding has been provided by local government (Nelson City Council and Tasman District Council) for construction, extreme weather event recovery, enhancement on parts of the trail, and operational funding. Councils also provide money for trail maintenance.
- The GTT has a Give a Little page, which is used as a donation page for entrants entering in local running and cycling events (e.g. Tour Aotearoa and the Monaco Mid-Winter Marathon) in the area. The money donated goes towards GTT enhancements.
- The Trust has an Official Partner Programme, which has a basic membership of \$295 per year, with the membership fees contributing towards construction, administration, marketing, and promotion of the trails. The Trust's official partner programme includes businesses that operate activities and attractions, accommodation, bike hire, bike shops and services, café & eateries and wineries and breweries in the area.

Sources: Information provided by the Nelson Tasman Cycle Trails Trust
Give a Little Page- Heart of Biking <https://givealittle.co.nz/org/ntctt>

Ministry of Business, Innovation and Employment NZCT funding recipients <https://www.mbie.govt.nz/immigration-and-tourism/tourism/tourism-projects/nga-Haerenga-the-new-zealand-cycle-trail/nzct-funding/nzct-funding-recipients/>
Heart of Biking Website: <https://www.heartofbiking.org.nz>

SOCIAL/COMMUNITY IMPACTS

Indications of how off-road recreational cycling is valued in the Nelson Tasman District include:

- The Great Rides are listed as one of the top 3 priorities of the Nelson Tasman Destination Management Plan 2021–2026.
- A target of the 2022 Nelson Active Travel Strategy is to double the proportion of people walking and cycling to work and school by 2035.
- In the last year, volunteers have planted, watered and weeded trees on the GTT.

At a broader, International and New Zealand wide level:

- Wilderness Magazine explains that *...“while the cycle trails were conceived to bring economic benefits for the regions, in reality they bring so much more. Jobs, community and social engagement, ecological restoration, health, wellbeing and huge local pride are emerging positives of Ngā Haerenga, the New Zealand Cycle Trails. On some trails, those involved say these are the real benefits, over and above economic return. And for many riders, the trails have become more than just a bike ride as they engage with the locals, immerse themselves in trail history, landscapes, and produce, and the manaakitanga with which they are welcomed.”*

- Waka Kotahi (New Zealand Transport Agency) describes the key benefits of cycling as; more livable towns and cities, improved conditions for travelling within towns and cities, stronger local economies, reduced costs for councils, less impact on the environment, and healthier and more productive people.
- Cycling is NZ's third most popular sport / recreational pastime and is accessible for riders across all demographics and abilities.

Local Trail Users Intercept Survey

It is clear the GTT plays an important role in the lives of Local Users and has positive impacts for the community. The top three community impacts identified are that the GTT is:

- Improving quality of life in Nelson / Tasman.
- Making Nelson / Tasman a more vibrant or appealing place to live.
- The GTT is accessible to wide range of people regardless of their skills or physical (dis)abilities.

There is also strong agreement that the GGT is valued by and a source of pride for the local community and has increased the profile of the Nelson Tasman district.

Sources:
: <https://www.wildernessmag.co.nz/great-rides-bring-communities-together>
.Nelson Tasman Destination Management Plan (2022-2026)
Nelson Active Travel Strategy (2021-2026)
chrome-extension://efaidnbmnibpcjpcglclefindmkaj/https://www.nzta.govt.nz/assets/Walking-Cycling-and-Public-Transport/docs/benefits-of-investing-in-cycling/cyclelife-benefits-booklet.pdf
Local Trail User Intercept Survey (n=270)

SOCIAL/COMMUNITY IMPACTS (CONT.)

Stakeholders from this research and the official partners and supporter Hui describe the following social / community impacts of the GTT:

- The GTT complements the Nelson Tasman District's plethora of outdoor, recreational opportunities and is a driver for people wanting to move to the District. It helps to frame the District in a positive, forward thinking and proactive context and is part of the local identity.
 - It is a safe and convenient recreation and active transport option. There have been roading / crossing improvements to make the GTT safer for users (and more are planned.) Having a safe space to recreate (cycle and walk) is particularly valuable in rural areas with no footpaths and narrow, dangerous roads.
 - The Trail is inclusive, family friendly and has multiple users, including, locals, visitors, old and young. It is a safe, cheap (free) and accessible place to recreate and for families to make memories. *"It is not just for well-heeled tourists."*
 - It is an equitable community resource and heavily used by local people as part of their daily lives. It is an important infrastructure asset which supports living and travelling/recreating in the 21st century
 - Importantly, the GTT is used more regularly throughout the year than outdoor sports grounds (which have more seasonal and weekend usage.)
 - Local Users benefit from trail improvements / extensions and the services and facilities along the trail.
- The GTT is a 'connector' to people, places and activities and has 'opened' the area up for people to explore on 'two wheels':
 - Loops and numerous access points provide opportunities for local, half and full day rides.
 - It is a corridor for locals for commuting and recreational use.
 - New infrastructure (bridges) on the trail have linked communities (and benefited trail users.)
 - The GTT promotes social cohesion through groups recreating and working together.
 - Visitors can meet and learn from local people, including food growers. In turn, local people benefit from meeting visitors from around the world, making new connections and learning about new places and cultures.
 - There are partnerships along the trail with Iwi, schools, business, Rotary, landowners, and volunteers.
 - Trail events linked to GTT generate community cohesion.
 - The GTT promotes cultural and social connections and interactions.
 - It provides linkages to rural communities and new places.
 - Also, access to riverside / swimming holes for small, rural communities.

SOCIAL/COMMUNITY IMPACTS (CONT.)

- The GTT promotes and facilitates community pride and ownership and a sense of wanting to show off the trail to friends and whanau from outside the District.
 - Local people participate in planting and weeding and feel that they are giving back.
 - There are opportunities to tell stories on / of the trail and for local people to learn about and appreciate the history of their area.
 - Also, opportunities for philanthropic giving (land, time, goods, services and money).
 - Several not-for-profit businesses generate revenue which is fed back into the local community, people and projects (including donating bikes to enable recipients to travel to work, study and socialize.)



INDICATORS OF CONTRIBUTION TO

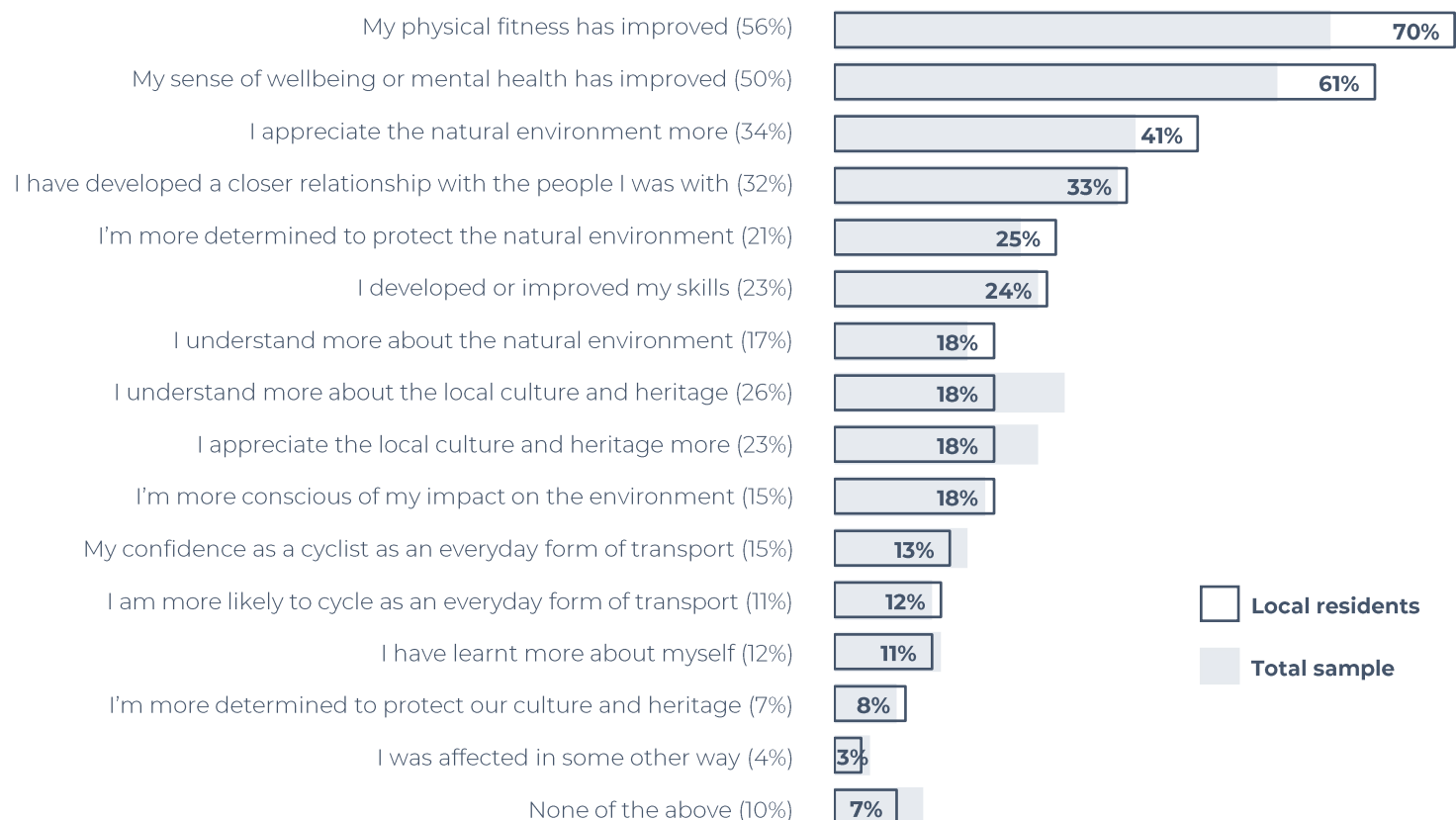
HUMAN CAPITAL

Human Capital is the capabilities and capacities of people to engage in work, study, recreation and social activities. It includes skills, knowledge, physical and mental health.

HEALTH AND OTHER REPORTED BENEFITS

- 70% of Local Residents claim their physical fitness has improved because of using the trail and 61% that their sense of wellbeing or mental health has improved, significantly more than All Trail Users; 56% and 50%, respectively.
- Between 25% of 41% of Local Residents say they appreciate the natural environment more, have developed a closer relationship with the people they were with, and are more determined to protect the natural environment.

Benefits (Total sample %)



HUMAN CAPITAL

Numerous studies, in New Zealand and internationally, endorse the benefits of cycling for improved physical and mental health and even more so now in a post-Covid world. These include:

- Improved cardiovascular fitness, stronger muscles, greater coordination and general mobility, and reduced body fat. People who bike to work (for transportation) are more likely to meet national physical activity guidelines. They are also more likely to meet recommended guidelines for cardiovascular fitness and health benefits.
- Cycling can also help improve mental health by lowering stress levels and stimulating feel-good endorphins. It is a low-impact activity that reduces stress on the hips, knees, and feet and may be performed by people who cannot do higher-impact activities such as jogging or running.
- Bicycling is versatile—you can ride alone or with a group, indoors on a stationary bicycle or outdoors in nature, and at any age.
- Group training (indoors spinning classes or outdoors) and fitness programs for older adults provide opportunities for social interaction.
- Cyclists benefit from reduced costs from driving a car or taking public transport.
- Mood and mode of travel does affect how we feel. Cycling is the happiest way to travel.
- Cycling has a key benefit to businesses. A 3-year study in Cambridge, UK, found that cycling to work reduces absence through illness.
- Alterations to urban streets to promote cycling and walking through speed limit reductions, establishing car free areas, low traffic neighbourhood and pop-up cycling infrastructure rapidly create measurable changes in injury risk, air and noise pollution exposure, crime, and physical activity. These factors help improve health risk factors and have long term effect on physical and mental health and reducing anxiety and depression.
- Research on The Impact of Transport on Population Health and Health Equity for Maori in Aotearoa New Zealand, found that if the 2011 NZ population was alive with no further air pollution, no road traffic injuries and the population achieving at least the recommend weekly amount of physical activity through walking and cycling from 2011 onwards – 1.28 million HALYs would be gained and \$7.7 billion (2011 NZ Dollars) would be saved from the healthcare system of the lifetime of this cohort. The study concluded that the then transport system in NZ had substantial negative impacts on health – at the similar level to the effects of tobacco and obesity and that transport contributed to health inequity.

Sources: Editorial Piece: Public health interventions: the elephant in the room of the health system crisis. By Caroline Shaw, Christine Cleghorn. Published in New Zealand Medical Journal 20 January 2023. <https://journal.nzma.org.nz>

Journal Article: The Impact of Transport on Population Health and Health Equity for Māori in Aotearoa New Zealand: A Prospective Burden of Disease Study. <https://doi.org/10.3390/ijerph19042032>

DAST (Doctors for Active, Safe Transport) Submission to the Greater Wellington Regional Council on Regional Policy Statement. By David Tripp – DAST – October 2022

<https://www.hsph.harvard.edu/nutritionsource/bicycling/#:~:text=Health%20benefits%20include%20improved%20cardiovascular,and%20stimulating%20feel%2Dgood%20endorphins>

<https://www.mrc-epid.cam.ac.uk/blog/2020/05/20/walking-cycling-to-work-reduced-risk-death-illness/>

HUMAN CAPITAL (CONT.)

Benefits of Cycling for Older Adults

The GTT is an especially valuable resource for Nelson Tasman's older citizens.

The Nelson Tasman Region has an older age profile when compared with the rest of New Zealand, with 22.5% of its residents aged 65+ (16.5% all New Zealand). The GTT well used by the 60+ age group, who comprise the majority - 59% - of Local Users.

Regular physical activity helps older people maintain good health, improves their quality of life, and increase their overall well-being. It can enhance physical strength, flexibility, and endurance, making it easier to perform daily activities and maintain independence.

Cycling is an activity that's particularly well-suited for older people due to its accessibility, it is easy on the joints, even for those with joint pain or injuries. "It can be tailored to individual fitness levels and adjusted to accommodate different abilities and physical limitations, too," "Recumbent bikes, trikes, or electric-assist bicycles can be used to make cycling more accessible for those with mobility challenges or balance issues." Other benefits include; improved heart health, reduced risk of chronic diseases, strengthens and protects joints, develops muscular strength, endurance and power, enhances balance and coordination, makes it easier to manage weight, provides social opportunities and connections, boosts mental health, and enhances brain function.

Cycling and Outdoor Activity Participation in the Nelson Tasman District

Data provided by Sport Tasman for the Sport NZ Active Survey shows that 52% of all residents in in the Nelson Tasman District have cycled (including BMX and E-Bikes) during the last 12 months, compared with 32% of all New Zealanders. Participation in road cycling (not e-Bike), mountain biking (not e-Bike) and e-Biking are all higher in the Nelson Tasman District, compared with all New Zealanders. Males and riders aged 35-49 are particularly well represented.

Walking, (89%), Swimming (38%) and tramping and running (42% apiece) are also popular outdoor pursuits for Nelson Tasman adults.

Children and young people (aged 5-17) are well-represented in cycling participation in Nelson Tasman, with 35% saying they have cycled in the last 12 months (compared with 27% of all 15-17-year-olds.)

48% of children / young people have also participated in running / jogging, 32% in walking and 28% in swimming in the past 12 months, like the rest of New Zealand.

Sources:

Nine Ways Cycling Regularly Can Enhance Your Overall Health – Laura Williams Bustos, M.S. (December 2023) - <https://www.bicycling.com/health-nutrition/a44568043/benefits-of-cycling-for-seniors/>

Source: Sport NZ Active Survey

C:\Users\senio\Downloads\regional-data-tables-active-nz-2022-tasman (1).xlsx

HUMAN CAPITAL (CONT.)

The 'Cost' of Cycling

The Monetised Benefits and Costs Manual (MBCM) is Waka Kotahi NZ Transport Agency's standardised guidance for assessing the monetised benefits and costs of proposed investments in land transport (activities). The primary purpose of this manual is to establish consistency, transparency, and comparability between activities to aid the evaluation of their economic efficiency. In June 2023, the social cost of a life was calculated as \$12.5 million per fatality. The statistical cost of a non-fatal serious injury was valued at \$660,100 and a minor injury, \$69,000.

In 2022 there were 19 fatal accidents involving cyclists in New Zealand, 157 involving serious injuries and 444 involving minor injuries. These highlight the significant social costs of cycle accidents in New Zealand and the potential social cost savings from safer cycling infrastructure and user safety improvements on the GTT (and other cycle trails).

Males, particularly those aged 10-19 and 45-65+ years are most at risk, and even more so when commuting to and from school and in the early evening (children) and during key commuting times (6.00 – 10.00 a.m. and 4.00-6.00 p.m.) adults. Most accidents occur in urban environments.

The (MBMC) also calculates the Impact of 'Mode' on physical and mental health, and the cost savings related to people who change modes. This could be people who switch from private vehicle use to walking or cycling, and therefore switch from being inactive to being active. Physical health benefits are included in benefit values for assessing pedestrian and cycling facilities. Currently, there is no standard monetised value for mental health impacts.

Values for new cyclists using conventional and electric assisted cycles are: Conventional cycling benefits - \$4.90 /km (maximum annual benefit per new user - \$6,200) and Electric-assisted cycling benefits - \$2.50 /km (maximum annual benefit per new user - \$4,600), demonstrating the significant health and mental health cost savings if more people can be encouraged to cycle.

While this research did not ask participants if they were new cyclists, given the increasing popularity of cycling and e-Bikes, we can hypothesize that if just 100 new conventional cyclists and 100 new e-bike riders per year could be encouraged to commute or travel by bike (travelling between 5.3 and 8 km each per day), this would equate to over one \$1 million of health and mental health savings for the district. (Or 200 new conventional and 200 e-Bike riders travelling c. 3-4 km per day and so on.)

Stakeholder feedback

Stakeholders from this research and the official partners and supporter Hui describe the following Human impacts of the GTT:

- Exercise and outdoor recreation support a good work / life balance, helps people to re-energise and regenerate and leads to good mental health and happiness. There are cumulative mental and physical health benefits from regular exercise and any time spent outdoors in the fresh air, in nature and by water. The benefits of 'Green' and 'Blue' prescriptions are widely known, and the GTT caters for both.
- It is safer than riding on roads for those commuting or going to school.

HUMAN CAPITAL (CONT.)

- It provides a safe, free and accessible exercise option for cyclists and walkers (runners).
- One stakeholder described riding on the Great Taste Trail as a 'delight' and that it evoked a sense of peace and freedom being able to ride so far off road.
- It provides the opportunity for children and adults alike to learn or improve their cycling skills.
- The accessibility of the GTT means it has become part of peoples' daily lives – a regularly used and appreciated public facility – not just for weekends and holidays.
- The GTT means users can be an interactive part of nature and experience it holistically. When walking or cycling you can hear, touch, feel and even taste nature, as well as see it.
- Cycling (and walking) are achievable and accessible activities for all members of society; from toddlers to great grandparents. Cycling is a great leveller, in that nearly everyone can ride a bike and the popularity of E-Bikes means riders of mixed ages and abilities can ride together.
- People come together to exercise and socialise on the GTT; it is a place for people with common interests to meet and to share tips and stories. Even solo usage provides an opportunity for social interactions, as riders and walkers often exchange greetings or start a conversation.

- The trail is mostly accessible to all users ... though some gates / barriers can be difficult to manage for those in wheelchairs and adapted bicycles. Notwithstanding, many sections are suitable for wheelchair users, who can be severely restricted for choice and accessibility of leisure and exercise facilities.

Intercept Survey Findings

- Findings from in the Intercept Survey indicate that 85% of Local Users use the GTT is for exercise, 71% for relaxation and 60% to spend time / socialise with friends or family, while over a third (35% apiece) use it to escape the pressures of daily life, experience or learn about the natural environment or to commute to / from school or work.

NZCT Survey Findings

- Local Residents from NZCT Survey describe the positive impacts on their mental and physical wellbeing from exercising, in the fresh air and socialising with friends and family. 70% claim their physical fitness has improved because of using the trail and 61% that their sense of wellbeing or mental health has improved. Furthermore, 41% said they appreciate the natural environment more, 33% have developed a closer relationship with the people they were with, 25% said they are more determined to protect the natural environment and 24% have developed or improved their skills.

Stakeholder Engagement and Official Partner and Supporter Hui
Source: Ngā Haerenga New Zealand Cycle Trails Trail User Survey Trail User Survey – Total sample all users July 2021-June 2023
Total users n=564 Local Users n=266
Local Trail User Intercept Survey (n=270)



INDICATORS OF CONTRIBUTION TO

NATURAL CAPITAL

As described in Treasury's Living Standards Framework, Natural Capital is all aspects of the natural environment that support life and human activity. This includes land, soil, water, plants and animals, minerals and energy resources.

NATURAL CAPITAL

Natural Capital includes all aspects of the natural environment that support life and human activity.

Secondary Research Findings

Creating a sustainable transport culture is a key priority in Nelsons City Councils 2021-2031 Long Term Plan.

The Council states “Encouraging people to walk, cycle or use public transport is one the keyways in which we can reduce the greenhouse gas emissions associated with transport.”

Domestic (Waka Kotahi, Ngā Haerenga New Zealand Cycle Trails, UCLA) and International (IPSOS) studies reaffirm the environmental benefits of cycling:

- Reduced vehicle kilometres and vehicles on the road
- Fuel savings
- Reduced greenhouse gas emissions / lighter carbon footprint
- Cleaner air
- Reduced health damaging air pollutants - carbon monoxide, nitrous oxide (NOx), and particulates (PM10)
- Less noise pollution.

Sources: (1) <https://www.nzta.govt.nz/walking-cycling-and-public-transport/cycling/workplace-cycling-guide/why/sustainability-and-environment/>
(2) <https://www.scoop.co.nz/stories/PO2208/S00088/new-zealanders-recognise-the-environmental-benefits-of-cycling-but-cars-are-still-heavily-favoured.htm>
(3) <https://transportation.ucla.edu/blog/how-bike-riding-benefits-environment#:~:text=Human%2Dpowered%20and%20not%20reliant,cuts%20back%20on%20fuel%20consumption.&text=The%20clamor%20cars%20make%20creates%20noise%20pollution>
(4) <https://www.nzcycletrail.com/about/the-new-zealand-cycle-trail-story/#:~:text=The%20New%20Zealand%20Cycle%20Trail%20now%20occupies%20an%20important%20place,through%20the%20money%20they%20spend>

Source: Ngā Haerenga New Zealand Cycle Trails Trail User Survey Trail User Survey – Total sample all users July 2021-June 2023

Total users n=564 Local Users n=266

Local Trail User Intercept Survey (n=270) 37

Intercept Survey Findings

Responses to the Intercept Survey show that 35% of Local Users use the GTT to experience or learn about the natural environment.

There is strong agreement – 82% of local users in the intercept survey - that the GTT is creating greater appreciation / understanding of the area’s natural environment.

NZCT Survey Findings

Findings from the Ngā Haerenga New Zealand Cycle Trails Trail User Survey, undertaken with users of the GTT, describe how 41% of Local Residents appreciate the natural environment more, 25% are more determined to protect the natural environment and 18% apiece understand more about the natural environment and are conscious of their impact on the natural environment.

12% say they are more likely to cycle as an everyday form of transport.

NATURAL CAPITAL (CONT.)

Stakeholder feedback

Stakeholders from this research and the official partners and supporter Hui describe the following Natural impacts of the GTT:

- Cycling and walking are sustainable, active transport options and the GTT is a facilitator and enabler of Nelson's Active Transport Strategy.
- The GTT supports Nelson Tasman's positioning as the green heart of Aotearoa.
- The building of the Trail has had a low environmental impact and there are few (ongoing) detrimental effects (litter).
- It has been sympathetically developed to be mindful of, and to integrate with, the natural environment, especially near waterways.
- It has prompted environmental improvements in some places and encouraged users to look after the trail (and the local environment). Users are, possibly, more caring and respectful of the natural environment they recreate in than those who do not. The loop trail is efficient and good for reducing carbon and emissions.
- The positioning of the GTT means that commuting is an attractive option – particularly with increased use of e-Bikes, and there are fewer cars on the road causing congestion and (noise) pollution.
- Some areas have been tidied up, weeded, and generally made more attractive and accessible. There are regenerative and restorative projects along the trail, including native planting and trapping activity, which is encouraging the return of birdlife.
- There is work with local catchment groups to improve and restore sections of the trail and the GTT provides opportunities to combine volunteering and exercise simultaneously.
- There may be further opportunities to partner with local groups – schools, sports groups, community groups – to adopt, manage, and improve 'their section' of the trail.
- And, to extend this to eco and voluntourism, where visitors are encouraged and supported to 'leave better / give back' by contributing time (or money) to environmental and restorative projects.
- The GTT has spread out tourism and encouraged visitors to explore away from the main 'hot spots'. It has taken some of the strain off the Able Tasman National Park.
- The GTT provides safe and 'clean' connections – between main urban centers and small towns, from mountains to the sea / foreshore and to nature (bush, rivers and birdlife, including the endangered Whio duck.)

NATURAL CAPITAL (CONT.)

- The GTT provides access to remote and new parts of the region, giving users the opportunity to explore and a greater appreciation of the natural environment and what the district has to offer.
- There are opportunities to partner with other environmental projects and attractions, for example, the Brook Waimārama Sanctuary, to educate users and encourage a greater appreciation of the natural environment.
- Some local businesses / industries have moved to composting and reusing/redistributing waste rather than putting it in the landfill.
- The GTT provides safe and accessible cycling opportunities and improved road and cycle safety by connecting communities by a cycling/walking pathway off busy main roads. The trail has been positioned near schools where practical so that children can use it e.g. Ranzau, Riwaka, Wakefield, Brightwater, Tapawera and Tasman.



INDICATORS OF CONTRIBUTION TO

FINANCIAL & PHYSICAL CAPITAL

Financial and Physical Capital is financial and human-made (produced) physical assets, usually closely associated with supporting material living conditions. It includes factories, equipment, houses, roads, buildings, hospitals and financial securities.

ECONOMIC IMPACTS

Secondary Research Findings

In the Nelson Tasman Insights Business Survey 2023 when businesses were asked what additional local support measures are likely to have the biggest impact on your business in the coming year, the 4th highest rating was infrastructure and facilities development (including cycling infrastructure).

The Nelson Mountain Biking Economic Study (2018) found that in total \$17.1 million of new and retained spending will occur annually because of the mountain bike trails in the region, including the flow on effects it generates a total of \$15.5 million in GDP to the economy and total of 211 FTE (Full time employees).

While the GTT is not a mountain bike trail, it does complement existing cycling infrastructure, trails and links. The GTT also complements regional tourism which is dominated by the Abel Tasman National Park with its prime season being December to March. The GTT attracts visitors to the region year-round.

There are around 70 partners and other businesses, with employees, along the GTT, including; Activities and Attractions, Accommodation, Bike Hire and Tour Operators, Bike Shops and Services and Cafes and Eateries, who derive economic benefit from the GTT.

Findings from The 2021 Evaluation of Ngā Haerenga Great Rides show that the number of visitor nights in accommodation providers along the Great Rides cycle trails was 3.62 million in the year to June 2021. It was an annual increase of 560,000 visitor nights, representing growth of 18 per cent.

Visitor spending attributed to the Great Rides cycle trails was \$951 million in the year to June 2021, an annual increase of \$226 million, or a 31 percent growth in economic activity.

Cyclists and walkers are spending more on regional accommodation, food, beverage and hospitality providers, and associated tourism and leisure activities like transport or cultural events. Cycle trails are bringing a direct economic contribution to the regions.

The research also estimated a total of \$11 million of health benefits for those using the Great Rides.

Using a combination of NZCT trail user survey data, counter data and Intercept Survey Data, it is evident that the Great Taste generates significant economic benefit for the Nelson Tasman District. Cyclists who visited the Nelson Tasman region solely or primarily to use the trail, spent an average of \$262 per night and stayed an average of 6.4 nights, equating to approximate economic benefit of \$1,679 per visitor and an estimated total economic benefit to the Nelson Tasman Region of over \$34 million (Year ended June 2023).

Cycling (or Cycle Trail specific) activities / fees (e.g. cycle hire, Cycle Trail Tours) account for the largest proportion of visitor spending, followed by accommodation and food and drink.

Sources: 1. Nelson Tasman Insights Business Survey 2023 - <https://www.nelsontasman.nz/assets/Nelson-Tasman-Insights-Business-Survey-2023-Web.pdf>
Source: Ngā Haerenga New Zealand Cycle Trails Trail User Survey Trail User Survey – Total sample all users July 2021-June 2023

ECONOMIC IMPACTS (CONT.)

Stakeholder Feedback

- Stakeholders from this research and the official partners and supporter Hui describe the following economic impacts and opportunities for the GTT.
- We note that some of these impacts are speculative only and are not supported by statistical data, nor do they necessarily align with the Trust's own Strategic Plan and direction, which set out very clearly the Trust's vision and objectives for the GTT.
- Nonetheless, there is understanding that the Nelson Tasman District benefits financially from the GTT and a strongly held view there is scope to benefit further.

Tourism / Visitors

- The trail supports and has flow on effects for the NTCTT's aim to create and maintain unique, safe and diverse cycle trail experiences that showcase the best of the Nelson Tasman region for visitors and locals, with a focus on regionally and nationally significant trails and linkages.
- Cycle tourists tend to have a higher discretionary spend than other tourists and are a sought-after target audience. The GTT complements other visitor 'attractions' in the area, provides a point of difference and an opportunity to keep visitors in the region for longer and to spend more money on accommodation, activities and food. 'Slow tourism' also has environmental benefits.
- The Trail extends tourism into shoulder and winter seasons.

- While the GTT is making a name for itself, it is also part of the Great Ride network which has nationwide and international visibility and the opportunity for sister trail partnerships.

(Potential) Business (and Trail) Development

- Existing (and potential) events linked (directly or indirectly) to the GTT attract locals and visitors alike and generate income for the District.
- Local people using the trail (and the businesses and services on it) keeps money in the District and supports the local / circular economy.
- Businesses have been established specifically to service and accommodate Trail users. This has created employment and additional income streams in smaller, rural and less accessible and visited areas.
- There is a strong view that there are opportunities for more business development on the Trail, as accommodation options are limited during the summer months, there are stretches of the trail without refreshments and users are not always directed to or encouraged to deviate to facilities / attractions slightly away from the trail.
- Some businesses have taken the initiative to improve the trail experience; building shelters and facilities and lobbying for infrastructure improvements (e.g. bridges, toilets).
- New technology will help to better plan for and accommodate trail users. For example, by providing accurate real time data; who is on the trail right now.

ECONOMIC IMPACTS – DIRECT AND INDIRECT ECONOMIC CONTRIBUTION

Direct Economic Contribution

- The Great Taste Trail makes a direct economic contribution through the expenditure of visitors who might not otherwise have travelled to the Nelson Tasman Region, and by encouraging those visiting for other reasons to stay longer to experience the Trail while they're there.
- In-district expenditure by the NTCTT – and others involved in trail development and maintenance – can be considered a direct contribution to Nelson Tasman's economy if the funds used are 'new expenditure' (i.e., not simply diverted from another local use) or sourced from outside of the District.

Indirect Economic Contribution

- Indirect economic contribution refers to the jobs created and the flow-on effect that results from the re-spending of money by households and businesses within the local economy.
- Also referred to as 'the multiplier effect', this is the additional economic impact created as a result of the direct economic contribution made.

VISITOR NIGHTS

Using a combination of NZCT Trail User survey data, counter data, and Intercept Survey Data, we have estimated that approximately 9% of all cyclists (80% of visiting cyclists) are visiting the region solely or primarily because of the GTT. We estimate this equates to 20,452 individual visiting cyclists, contributing an average 6.4 visitor nights to the region in the last financial year.

VISITOR ACTIVITY ON THE GREAT TASTE TRAIL



80%

Of visiting cyclists who visited the region because of the trail

(67% in 2022) ^x



20,452

Total visiting cyclists attributed to the trail

(17,315) visitors in 2022) ^{xx}



6.4

Average visitor nights

(5.8 visitor nights in 2022)



129,868

Visitor nights

(100,253 visitor nights in 2022) ^{xxx}

^x Source: NZCT Trail User survey – proportion of visiting cyclists a) visiting the region and b) because of the Tasman Great Taste Trail (YE Jun 2022 n=86, YE June 2023 n=125)

^{xx} Calculated by cross referencing Trail User and Intercept Survey results with Trail Counter data for Tasman Great Taste Trail, which estimates C. 9% of visiting cyclists visited the region because of the trail.

^{xxx} Calculated by multiplying the total cyclists visiting the region because of the trail by average visitor nights.

The number of cyclists is calculated by discounting the **total number of cycle passes** from the trail counter data to account for those who pass multiple counters and those who pass none. This number is further discounted to recognise the high proportion of local users who had used the trail multiple times in the last year and for visiting users taking 1-2 trips on the GTT each year.

TOTAL VISITOR NIGHTS



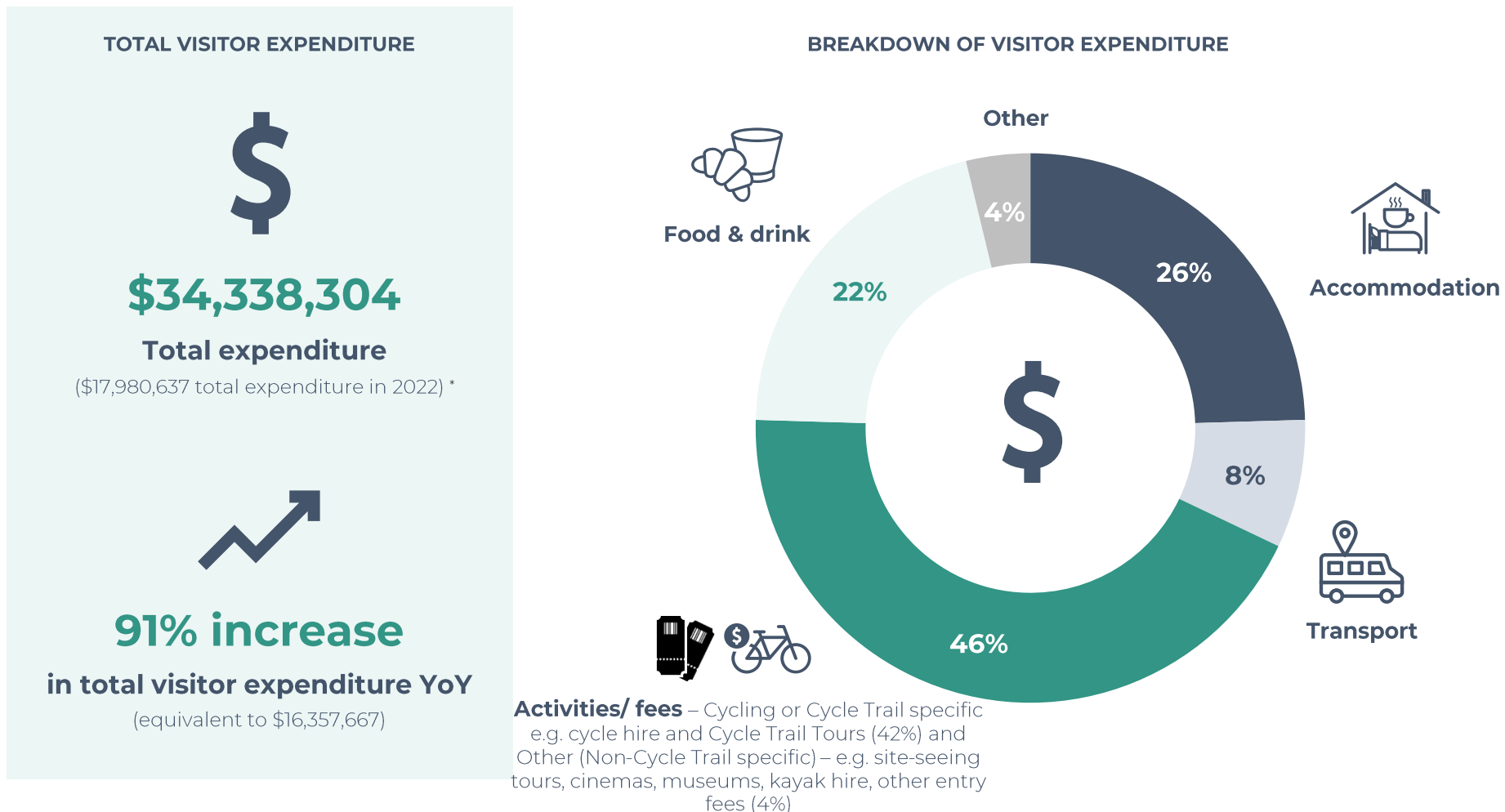
30% increase

in visitor nights year on year

(equivalent to +29,615 visitor nights)

VISITOR EXPENDITURE (DIRECT ECONOMIC CONTRIBUTION)

Using a combination of NZCT Trail User survey data, counter data, and Intercept Survey Data, we estimate the GTT delivered over \$34 million in new expenditure to the Nelson Tasman District in YE June 2023*



VISITOR EXPENDITURE - AVERAGE SPEND [DIRECT ECONOMIC CONTRIBUTION]

The GTT's economic contribution to the Nelson Tasman District is spread across all sectors of the economy, with cycle trail specific activities / fees (e.g. cycle hire, Cycle Trail Tours), accommodation and hospitality businesses reaping the largest shares of visitor expenditure. In the year ended June 2023, the average expenditure per GTT user was \$1,679, increasing 62% percent on the previous year.*

VISITOR EXPENDITURE PER PERSON



\$1,679

Average expenditure per person
(\$1,038 per person in 2022) *



62% increase
in visitor expenditure per person
(equivalent to +\$641 per person)

In-region expenditure	YE June 2022		YE June 2023		YoY change
	Average Spend	%	Average Spend	%	%
Accommodation	\$299.50	29%	\$428.65	26%	43%
Petrol/fuel	\$48.06	5%	\$31.58	2%	-34%
Transport (cycle trail specific)	\$19.98	2%	\$49.83	3%	149%
Other transport	\$25.53	2%	\$59.60	4%	133%
Activities/ fees (Cycling / Cycle Trail specific e.g. cycle hire, Cycle Trail Tours)	\$215.72	21%	\$702.57	42%	226%
Other activities/admission fees e.g. site-seeing tours, cinemas, museums, kayak hire, other entry fees	\$38.67	4%	\$72.45	4%	87%
Snacks/groceries	\$75.33	7%	\$89.88	5%	19%
Cafes, restaurants, eating out	\$197.33	19%	\$247.52	15%	25%
Bars, nightclubs	\$33.79	3%	\$39.58	2%	17%
Other expenditure	\$84.55	8%	\$73.57	4%	-13%
Total Expenditure	\$1,038.45		\$1,679.03		62%

*Average expenditure reported per person by respondents to the Trail User survey. The average is calculated taking into account both day and overnight visitors and adults and children (with each adult assigned a value of 1 and each child a value of 0.5 in the calculation). Data is collected for the individual respondent or group of which they are part (by respondent preference) and broken down across the range of categories shown. Sample: visiting the region because of Tasman Great Tasman Trail: YE June 2022 (n=86), YE Jun 2023 (n=125).

APPENDICES

A group of four cyclists is riding on a paved path that curves through a grassy area. In the background, there is a large body of water, likely a lake, and a range of mountains under a clear sky. The cyclists are wearing helmets and athletic gear. The entire image has a light blue overlay.

APPROACH

Angus & Associates worked collaboratively with The Trust to agree the design and scope of the research and develop the trail user intercept survey and stakeholder engagement topic guides.

Data for the impact assessment has been drawn from the sources (and methods) outlined below.

SECONDARY (DESK) RESEARCH (INCLUDING EXISTING TRAIL DATA)

The secondary (desk) research included a review of existing data and research on in-scope cycling activity in the Nelson Tasman Region. This included, but was not restricted to, Ngā Haerenga New Zealand Cycle Trails data, regional economic data, data relating to tourism activity in the Nelson Tasman District, NZ and International cycling data, and trail user survey data and reports and counter data from the Great Taste Trail Trust.

STAKEHOLDER AND PARTNER ENGAGEMENT

15 Zoom or telephone interviews were undertaken to support and complement the secondary and trail user survey data. This engagement focused on a broader understanding of the impacts and benefits of the GTT, from the perspective of key local/regional stakeholders, including with business owners, local Authority, regional stakeholders and official partners.

PRIMARY RESEARCH WITH LOCAL TRAIL USERS

A short intercept survey (appended) was undertaken by GTT volunteers and employees to gain evidence and information from all trail users, with a specific focus on understanding the impacts and benefits of the GTT for the local community.

The criteria for completing the survey was that trail users lived locally (in the Nelson Tasman District) and were aged 15+ years. Trail users accessing the survey off the trail were also asked to confirm they had used the GTT within the last 12 months. Trail users, who did not live locally, were screened out (did not complete the survey) but were included in the overall counts to inform analysis of the proportion of local versus other trail users.

Fieldwork was conducted over a six-week period from 26th October to 18th December 2023 on both weekdays and weekends and at different times of day and at different sites on the trail, to ensure the survey had a wide reach and that a spread of users (from commuters to weekend social groups) were invited to participate in the research. The field work was conducted at seven sites along the trail, including River Kitchen, Railway Reserve (Beatson Road), Monaco/Honest Lawyer, Richmond Dev/SH6/Lower Queen, Fittal Street, Brightwater HQ Café/Wakefield and Mapua Drive/Stafford Road.

Field staff accessed a direct to survey link on a mobile device and trail users were invited to complete the survey on the trail.

Angus & Associates also worked with the NTCTT to develop flyers (with a survey link and a QR code), which were distributed to trail users who did not have time to complete the survey on the trail.

A prize draw incentive of a \$50 voucher from a local hospitality venue was offered to those who completed the survey

The data used to inform the impact assessment is based on a final survey sample of n=307, with 89% (n=270) being Local Users.

REPORTING NOTES

Two sets of data have been used to inform the quantitative analysis:

- [On-trail Intercept Survey data](#) - The primary purpose of the intercept survey was to understand the impacts and benefits of the GTT for the local community. However, to provide robust evidence of the trail user profile, and the proportion of local vs. other trail users, all users were invited to participate in the survey. This was important to gain a definitive understanding of the proportion of Local Users in a 'normal' year, without the impacts of Covid travel restrictions potentially skewing data collected over this time.
- This is supplemented by [Ngā Haerenga New Zealand Cycle Trails Trail User Survey data](#).

While some questions are replicated in both surveys, the findings are not directly comparable as they use different data collection methods, over different time periods and the surveys have a different objectives:

- The Intercept Survey was a one-off stand alone, face to face survey, undertaken by GTT volunteers and employees, who accessed a direct to survey link on a mobile device and trail users were invited to complete the survey on the trail. The primary focus of the survey was to provide a better understanding of how residents and communities use, benefit from and value the GTT. The proportion of Local Users in the Intercept Survey was 89%.
- The Ngā Haerenga New Zealand Cycle Trails Trail User Survey data undertakes an ongoing survey of Trail Users using a survey application developed for Ngā Haerenga NZ Cycle Trails and the 23 Great Rides that make up the network. This uses a combination of methods to access a sample that is as broadly representative of trail users as possible. These includes emailed invitations sent directly to an event database, collection of contact names by staff/volunteers, with follow-up distribution of personalized email invitations, promotion of public web links via newsletters, social media, on-site QR codes and posters, hand-outs of pamphlets and business cards; and Promotion of the survey via a growing number of local businesses and official trail partners. The primary focus of the research is to detail how the 23 Great Rides that make up Ngā Haerenga are impacting trail users, the communities in which the trails are located, and Aotearoa New Zealand as a whole. The proportion of Local Residents in the NZCT research was 39% (YE June 2023).
- For economic impact calculations, we have taken a conservative approach; using the expenditure data and proportion of cyclists visiting the region solely or primarily to use the trail, collected in the NZCT survey, and usage (visitor vs. local user and mode of travel) data collected in the Intercept Survey data. This assumes 80% of visiting cyclists were visiting the trail solely or primarily to use the trail, which equates to 8.8% of all users. $(100\% \text{ (All Users)} \times 11\% \text{ (Visitors)} \times 80\% \text{ (Proportion of cyclists visiting solely or primarily to use the trail)}) = 8.8\%$. For consistency, we have used these assumptions for YE June 2022 and YE 2023.
- The total (starting) number of cyclists for the economic impact assessment has been calculated using discounted trail counter 'pass' data, which balances trail users passing multiple counters in one trip and those who pass none. This was further discounted to recognise the high proportion of local users who had used the trail multiple times in the past year. 57% of local users had used the GTT 50+ times, while 44% had used it between 1-49 times. We assumed visitors had used the GTT 1-2 times in the past 12 months.

NELSON TASMAN DISTRICT SNAPSHOT

Demographics

Nelson Tasman has a population of c. 115,000. One in five residents were born overseas and there are 48 different cultures living in its environs

The District has an older age profile when compared with the rest of NZ, with 22.5% of its residents aged 65+ (16.5% all NZ), 61.5% aged 15-64 years (64.9% all NZ) and 16% aged 0-14 years (18.5% all NZ).

The District has a dependency rating ratio of 62.5% compared with 54% for all NZ. (The dependency ratio is the number of under 15-year-olds and over 65-year-olds as a ratio of the rest of the population.)

Note: The age composition of an area's population has implications for the demand for services and facilities, as well as decisions regarding changes to property rates. For example, as a population ages, the demand for certain types of service and new facilities, for example schools, will decrease. Meanwhile, as a greater proportion of population retires from work, sources of incomes change and there is likely to be an increase in demand for leisure and care-based facilities.

The GTT fulfils an important role as an accessible leisure-based facility for all (including older) residents and is supporting them to stay fitter and healthier for longer.

<https://ecoprofile.infometrics.co.nz/nelson-tasman/Population/AgeComposition>

Cycling is more popular in Nelson Tasman than in many other parts of New Zealand

Data provided by Sport Tasman for the Sport NZ Active Survey shows that 52% of all residents in the Nelson Tasman District have cycled (including BMX and E-Bikes) during the last 12 months, compared with 32% of all New Zealanders. Participation in road cycling (not e-Bike), mountain biking (not e-Bike) and e-Biking are all higher in the Nelson Tasman District, compared with all New Zealanders.


Children and young people (aged 5-17) are also well-represented in cycling participation in Nelson Tasman, with 35% saying they have cycled in the last 12 months (compared with 27% of all 15-17-year-olds.)

Encouraging Active Transport and Cycling are Local Government Priorities

- The benefits of and importance of cycling for the sake of the environment (climate change), and wider economic and tourism benefits for the District are described in the following regional planning documents: Nelson and Tasman Long Term Plans, NCC Active Travel Strategy, TDC Walking and Cycling Strategy, Te Taihū Intergenerational Strategy, the Regional Land Transport Plan Nelson Active Travel Strategy and Nelson Tasman Destination Management Plans.
- Creating a sustainable transport culture is a key priority in Nelson City Council's 2021-2031 Long Term Plan, after the council declared a Climate Emergency in 2019. Encouraging people to walk, cycle or use public transport is one of the main ways identified to reduce the greenhouse gas emissions associated with transport. The Council's target is to double the proportion of people walking and cycling to work and school by 2035.
- The Visitor Economy is a significant driver for the Nelson Tasman, providing \$233 million of GDP in 2022, 4,295 jobs and visitor spend of \$299 million and the GTT and the Coppermine Trail are identified as a key priority for the Nelson Tasman Destination Management Plan (2021-2026).


SATISFACTION AND NET PROMOTER SCORE

- All Users and Local Residents express very high levels of satisfaction with their trail experience, with 92% and 91% respectively rating their experience 7, 8, 9 or 10 (out of 10).
- 94% of Local Residents rate their propensity to recommend the GTT 7, 8, 9 or 10 (out of 10).



91%
rated their trail experience 7, 8 or 9 or 10
(out of 10) (Local residents)

92% of All trail users



+74
Net Promoter Score (Local residents)

+67 for All trail users

	Total sample	Local Residents
10 (Very Satisfied)	32%	34%
9	27%	24%
8	25%	26%
7	8%	7%
6	5%	5%
5	2%	3%
4	0%	0%
3	1%	0%
2	0%	0%
1 (Very Dissatisfied)	0%	0%
Base	n=564	n=266

Net Promoter Score (NPS) is an indicator used globally to measure customer engagement and advocacy, based on the likelihood of a customer **recommending** a given product or service. Any positive score means there are more loyal advocates willing to recommend the product or service (promoters) than unhappy critics (detractors). A passive customer is satisfied, but unenthusiastic. A high score of +100 means that every customer is a promoter, while a low score of -100 means that every customer is a detractor.

	Total sample	Local Residents
Promoters (9-10)	74%	80%
Passives (7-8)	19%	14%
Detractors (0-6)	7%	6%
Net Promoter Score	+67	+74

LOCAL TRAIL USER SUGGESTIONS

While local users are mostly complementary and very positively disposed toward the GTT, as evidenced by high satisfaction ratings, when asked what opportunities there are to improve their experience, trail users made a range of suggestions:

Some call for improved trail safety and rideability, including:

- 'Controlling' the direction of traffic (or providing adequate warning) where the trail is narrow, and visibility is poor.
- Being mindful of the build up of deep gravel, which is difficult to ride on and 'forces' users to ride on the road. Many would like to see the GTT sealed or an alternative to gravel found.

Others suggest making all the GTT off-road (though acknowledging the prohibitive costs and resources required to do so.) However, in summer, sections of the GTT are very dusty and unpleasant to ride on, and even more so when drivers fail to slow down or give room to cyclists.

- Improved rider etiquette, encouraging cyclists to ride on the left, not to cut corners and for e-Bikes to slow down.
- Adequate warning for inexperienced MTB riders travelling to Kaiteriteri; neither the MTB or the road options are safe.
- Improving track maintenance, including trimming vegetation and filling potholes.
- Safety rails or warning for inexperienced riders to dismount and walk.
- A light in the Spooners Tunnel.

- Others call for more and improved facilities and infrastructure:
 - Toilets
 - Shelters
 - Picnic spots
 - Water stations
 - More – visible - and improved signage and directions. (Several users describe getting lost, having to ask for help and helping others who have missed signs.)
 - Trail extensions and spurs.
- And more services supporting the GTT ... and specifically the 'TASTE' element:
 - Accommodation
 - Food, drink and cafes
 - Places and things of interest to read about and to stop at
 - Extended ferry service operating hours to support commuters and week-day trail usage (and avoid users riding on the road.)
 - Information, including real time information on the website and an interactive planning tool (with times, distances and activities).
- Many local users could not think of any opportunities to improve their the GTT and had thoroughly enjoyed their experience.

VERBATIMS – LOCAL TRAIL USERS

One small criticism: Consider some of the bollards are a fraction too high, particularly those on rise by the Main Road under-bridge adjacent to Bunnings, Stoke. Have noticed some elderly folk have trouble negotiating them, concerned they may hit them with their handlebars. Gap could also be wider.

I found it great, but when re-entering the Kaiteriteri Bike Park, I came across a couple from mot who were making their way to Kaiteriteri. The lady had fallen from her bike and said the track (easy rider) was very difficult for her to ride and was very different from the rest of the trail

A lot of the trail was on roads or not particularly scenic. I didn't feel like there was that many opportunities to 'taste' either.

Less trucks and vehicles passing us on the Wangapeka Valley Road.

Education of the larger groups when meeting other cyclists. they do need to move over to the left. if like many they are no confident riders they should spread out and stop if unsure.

Other riders on e-Bikes slowing down near other riders.

The tunnel is daunting for a solo rider, I didn't go through. I might have been able to get through with lighting or even a better (dry and light coloured) surface. Friends say that even with lights it is very dark - possibly the soot doesn't reflect any light. A white coloured shingle may help. There was a history board at Kohatu but I didn't see any other boards with local information anywhere else on that section.

If the trail was offroad. trail extremely busy with cars and extreme dust

The surface could do with a bit of attention in some areas as with anything that is regularly getting used the wear and tear on the trail is starting to show. But other than that, an enjoyable experience

The surface could do with a bit of attention in some areas as with anything that is regularly getting used the wear and tear on the trail is starting to show. But other than that, an enjoyable experience

More stops on today's route near the river for rest/picnic or swimming and maybe a water tap at the awesome shelter at the new bridge.

Some signage did not have distance information on them e.g. at turnoff up to Baton Saddle from Tapawera end. Some maps indicate about 5km unsealed between Tapawera and Baton Saddle. It's more like 10km.

The no existence of trail from Rabbit Island to Mapua. The ferry doesn't operate before 10.00am in summer and not at all from April to October.

Commuting to Richmond via the Coastal Highway is downright dangerous amongst cars and TRUCKS. An alternative cycle route from Mapua to Redwood Road or Rabbit Island is necessary. How about a walking/cycling bridge at Mapua? I understand that there is a sizable amount of money for improvements to the trail. Recently we cycled in Napier. The surface of all their trails is crushed limestone on a pleasure to ride on. Plenty of limestone locally for future use perhaps.

If possible, to have extend the reach of the trail, inviting the Maitai, Brook and even Atawhai Valley. It would bring a lot more people to bikes and widen the range of location.

Need more gravel on the cycle way on Pugh Road full length and especially just before it crosses Eden Road as it floods all the time. There are big puddles after rain and from irrigator used on the agriculture.

Gravel was uneven in parts and trail was narrow at winding bits not being able to see oncoming walkers, runners, bikers.

Not waiting for Mapua Ferry. A pedestrian bridge would be a great idea. I would then use the cycle trail to get to work. Mapua to Richmond.

Missed one turn off between tunnel and Kohatu. Bigger signs at crucial points please.

STAKEHOLDER AND PARTNER SUGGESTIONS

Stakeholders from this research and the official partners and supporter Hui are extremely positive toward and supportive of the GTT and believe there is significant opportunity to improve and develop it more.

They acknowledge that the trail is evolving and improving all the time - there is more accommodation, food, facilities, signposting and infrastructure (bridges, charging points) - which are improving the experience for local users and visitors alike (and which will encourage more users.)

They also applaud the hard work and commitment of the NTCTT, volunteers and community groups who have worked hard to get the GTT to where it is today.

Stakeholders understand the resourcing challenges and restrictions - financial and people – facing the GTT, but worry the branding may be a little misleading- ahead of its time – and that there is still much work to be done to optimize the full potential of the GTT. Their suggestions how this might be achieved are summarised below:

Marketing and Communications – Building Awareness, Pride and Ownership

Stakeholders would like to see wider visibility, promotion and education about the GTT, as they worry there is still lack of awareness and confusion about what the GTT is (even among local people).

They also feel it is important to showcase the GTT more, potentially, inviting Council Staff and Elected Members to ride (some of) the GTT to strengthen their feelings of pride in this important taonga.

There is much more trail than taste. There is not a lot to eat or drink ... mainly growers not sellers.

Information

- More signage and information on the trail per se. For example, ferry and other businesses and amenities opening times to warn riders in advance.
- Information on how to find the 'taste'.
- Portal for all GTT information; a one stop shop with links to other information (i-site?), which businesses can access and update with opening hours, warnings, track closures and special offers. This could form part of a comprehensive and up-to-date planning tool for users, who can't always rely on Google for the latest information.

Bringing the GTT to Life

- More panels, maps and information boards (story telling).
- More to see, do, buy and eat; attractions, facilities, amenities, concessions and stalls ...MORE TASTE.
- Public art, sculptures.

Trail Development

- More facilities / amenities and support services open for longer; water, benches, toilets.
- More accommodation as Summer accommodation is booked months in advance. If users can't stay, they won't come which risks losing valuable revenue.
- Resurfacing; less gravel, which is dusty and difficult to ride on.
- Long term, envisage GTT as the spine with off shoots, spurs and connections to local sub trails via old embankments and green corridors. Also, to businesses (activities / accommodation) off the trail.
- Potentially, local hubs (using shipping containers or similar)... with local produce stalls, coffee (?), cold drinks, toilets and water stands.

GREAT TASTE TRAIL SOCIAL AND ECONOMIC IMPACT ASSESSMENT

STAKEHOLDER AND PARTNER SUGGESTIONS [CONT.]

Stakeholders identified the following human, community, economic and environmental impacts and benefits which are derived from the GTT.

Human Benefits

- Improved safety: more off-road trail, fewer road crossings, not too much stopping at intersections, bike traffic lights, safe crossing places.
- Encouraging people to ride on the GTT not the road; potentially providing some tips and education for riding on gravel.
- Improved year-round useability and commuting opportunities:
 - Increased ferry frequency and/or a bridge
 - Cycle corridor from Richmond to CBD
 - Education about using the trail to commute to Nelson CBD.
- Improved access for all Users, including wheelchairs and adapted bikes, without compromising safety of all trail users through inappropriate use by a minority. Potentially, consider lending or giving gate / barrier keys to selected local users?
- More activities on / linked to the trail and directions how to bike to and between them.

No doubt in my mind that there would be less people cycling if there was no Great Taste Trail.

Good to feel positive about where you live. The Great Taste Trail is a source of pride for the community.

The social side and health benefits cannot be underestimated.

Community Benefits

Engagement

- School Sector – School Trips / NCEA Year 13 PE Credits / EOTC.
- Connect with larger groups for events e.g. Rotary.
- Iwi engagement and representation (to tell their stories).

Connections

- More story telling about the local community, Agriculture (Hops / Boysenberry) and Historical (Gold Mining, Mana Whenua).
- Help cyclists connect with local Iwi, history, geology so that they enrich their experience..

Enhance responsibility and sense of pride

- Local communities can be encouraged to adopt a spot and have permission to manage, look after and maintain that spot how they choose (within reason) e.g. art on shelters, plantings, signage. This will lead to a feeling of ownership and take away some onus and responsibility from the NTCTT.

Volunteering

- Volunteer Ambassadors / conservation volunteers.
- Help at i-site or operate as city guides.
- Friends of the Trail.
- School / community clean up days.

The alternative is driving on the State Highway NO THANKS."

GREAT TASTE TRAIL SOCIAL AND ECONOMIC IMPACT ASSESSMENT

STAKEHOLDER AND PARTNER SUGGESTIONS [CONT.]

Economic Benefits

Monetise the trail (for those who can afford or choose to spend):

- Encourage users to engage in the trail in a more interactive way by suggesting more reasons to visit and giving them access to more things to buy.
- Improved signage to businesses on the trail.
- Hosting more on trail events or promoting the trail as a means of transportation to and between events e.g. the Festival of Cycling.
- Capitalize on the Great Rides connection / relationship.
- Investigate a more regular ferry service or a smaller, more frequent ferry, which operates continuously or as and when needed.
- Support local businesses to work together to optimize the benefits of the trail for all businesses (not just themselves).
- Business mentoring; experienced operators helping those who are new.
- Reciprocal on-selling and cross promotion of additional activities in the region.
- Educate residents within easy access of the trail of the earning potential of their spare rooms and 'Granny Flats' to address accommodation shortages on the Trail.

Danger is that we could get a bit myopic and focus on our own businesses ... cafes and businesses should be working together for mutual benefit and improving things like parking, security and other facilities for trail users.

Environmental Benefits

- Concerted and coordinated approach to reduce waste, including more recycling and organic waste bins.
- Water maps to encourage to bring refillable drink bottles to reduce plastic waste.

(One stakeholder advised that businesses could put a sticker in their window inviting customers to fill up their water bottles here, and hopefully, spend money on other goods while doing so.)

- Improved commuting opportunities (to reduce emissions and traffic congestion.)
- Planting/weeding/trapping days; encouraging local businesses to get involved for a day as part of their local philanthropy.
- School / community clean up days.
- Regenerative and eco-tourism ... cycling is more sympathetic to the environment than other modes of transport and cycling trips are leading the way in this space.

Lots of economic and local value ... the Great Taste Trail is worthy of supporting.

GREAT TASTE TRAIL SOCIAL AND ECONOMIC IMPACT ASSESSMENT

STAKEHOLDER AND PARTNER SUGGESTIONS [CONT.]

Stakeholders and Official Partners do not under-estimate the challenges facing the GTT in this difficult and competitive economic climate, where there are multiple organisations competing for financial and other resources.

Key risks identified (based on experience, perceptions and observations and not necessarily on robust evidence) include:

- There may be a risk of the inland loop potentially becoming a White Elephant as there is not much there (to encourage people to visit). Riders rush through significant parts of the trail, as there is nothing to slow them down to look at, read or buy. There is limited information about the area's history, heritage or modern day, on long stretches of the trail.
- Managing (some) negative local community sentiment is time consuming and diverts energy and resources away from key trail tasks.
- Sections of the trail are very remote, with few facilities (water, food) and poor communication, which have safety implications for trail users. Stakeholders report incidents of cyclists being dehydrated, with sunburn and sunstroke and falling off their bikes. Adequate warnings and preparation are paramount.
- While stakeholders are enthusiastic about the possibility of trail extensions and upgrades, they recognise the high and ongoing costs of maintaining and making safe the trail. More regular extreme weather events going forward will mean maintenance and safety will be even more costly.
- There are concerns that the GTT may lose its Great Ride status if its full potential is not optimised. Stakeholders are aware that there are strict criteria and expectations of Great Rides and that there are other cycle trails in New Zealand vying for Great Ride status.

There are some local grumblings about bikes on the road ... and it is dangerous and narrow, so you must slow down. But I feel sorry for them on the dusty gravelly road ... it isn't pleasant to ride on.

