

# TOP OF THE SOUTH

## AT A GLANCE

*Our focus in Nelson, Marlborough and Tasman is to help create a safer, more resilient land transport system. One that supports the recovery from the impacts of COVID-19 on community wellbeing, encourages increased use of public transport, walking and cycling in the main urban centres and provides appropriate levels of service across all transport networks.*

## COVID-19 INSIGHTS AND IMPACTS

This section sets out the how the current pandemic might impact on land transport in the Top of the South (TOTS). Significant levels of uncertainty remain regarding the scale and duration of COVID-19 impacts, particularly in the medium to long-term. We will continue to monitor and update as things change.

### POTENTIAL IMPACTS ON KEY SECTORS

- The economies of these three regions reflect New Zealand's economy as a whole, with primary production, manufacturing, government services, healthcare and retail trade all making significant contributions. As a result, the regions are forecast to be impacted by the downturn generally in line with the national average.
- The TOTS will be impacted by a reduction in international tourist (33% of total tourism spend comes from international visitors), but less so compared with other regions in the South Island.<sup>54</sup>
- The TOTS is reasonably well-placed to benefit from any increase in domestic tourism given their central location and relative accessibility.
- The significant primary sector including forestry, horticulture, viticulture and pastoral farming, along with seafood, are forecast to remain relatively stable during the recovery period.

### POTENTIAL IMPACTS ON EMPLOYMENT AND COMMUNITIES

Under the slower recovery scenario:

- the Tasman region faces a forecast fall in employment to 2021 (relative to BAU) of -6.2% which is slightly lower than the national average of -6.7%<sup>35</sup>
- the forecast fall in employment for Nelson (-6.7%) is in line with the national average and Marlborough (-7.3%) is slightly higher<sup>35</sup>

- together the regions are forecast to bounce back relatively well, with employment levels returning to near BAU by 2025<sup>35</sup>
- Māori, Pasifika and youth are likely to experience the greatest impacts. An increase in youth not in employment, education or training (NEETs) is expected.

### POTENTIAL IMPACTS ON THE LAND TRANSPORT SYSTEM OVER THE COMING DECADE

- No significant changes are expected in the nature, scale and location of transport demand over the medium to long-term and the 10-year outlook remains largely unchanged.
- Maintaining safe and reliable connections between the upper South Island and Canterbury will be important to supporting recovery, while providing efficient access to Picton port for Cook Strait traffic remains important.
- Domestic tourism destinations such as Kaiteriteri, Marlborough Sounds and Golden Bay may experience an increase in demand at least in the short-term.
- There will be an ongoing need for transport services to support COVID-19 recovery by improving access to employment and essential services for vulnerable communities.
- There will be ongoing pressure on transport revenue as a result of the COVID-19 lockdown.

## REGION STEP CHANGES

### IMPROVE URBAN FORM

Future growth is expected in the Nelson urban area with more modest growth expected in Blenheim over the next 30 years. Nelson is the main commercial centre with Richmond growing in support of residential and business growth in surrounding areas.

### TRANSFORM URBAN MOBILITY

A high proportion of journeys to work are by private vehicle, while walking and cycling rates are above the national average.

### SIGNIFICANTLY REDUCE HARMS

Nelson, Marlborough and Tasman have a relatively poor road safety record with high-risk intersections, run-off road crashes, vulnerable users, high-risk urban and rural roads and speeding all contributing factors.<sup>47</sup> Focus is needed on Nelson and Blenheim urban areas and high-risk rural roads.

### TACKLE CLIMATE CHANGE

Increased sea level rise and extreme weather, flooding, storm surges and king tides will affect coastal communities and vulnerable inland transport routes.



SIGNIFICANCE OF STEP CHANGE TO REGION 2021-31



**150,609**

REGIONAL POPULATION<sup>25</sup>

**9.9%**  
REGIONAL POPULATION GROWTH 2013-18<sup>25</sup>

**3.2%**  
OF NATIONAL POPULATION<sup>25</sup> 2018

**3.6%**  
OF NATIONAL DEATHS & SERIOUS INJURIES (DSI)<sup>47</sup>

**108** TOTAL DSI<sup>47</sup>  
ANNUAL AVERAGE FOR PERIOD 2016-19

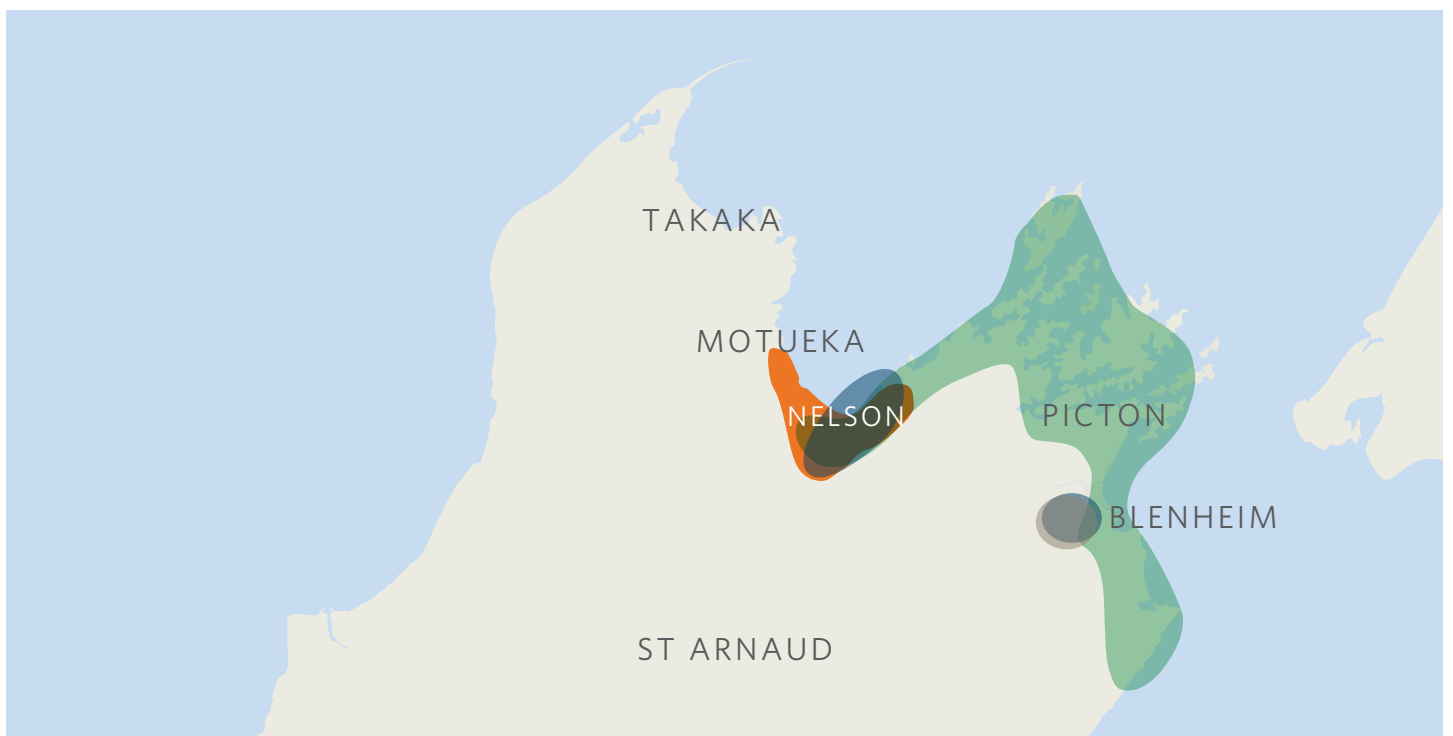
**4%**  
OF NATIONAL VEHICLE EMISSIONS<sup>48</sup>

**2.9%**  
OF NATIONAL GROSS DOMESTIC PRODUCT YEAR END MARCH 2018<sup>26</sup>

**3.9%**  
REGIONAL UNEMPLOYMENT RATE

**4.1%**  
NATIONAL RATE YEAR END JUNE 2019<sup>49</sup>

Pre COVID-19 data



## TOP OF THE SOUTH TODAY

Because of the level of uncertainty of population and economic trends, this section has not been reviewed in detail for Arataki V2.

### THE TOP OF THE SOUTH (TOTS) COVERS THE TASMAN, NELSON AND MARLBOROUGH REGIONS. THESE REGIONS ARE PROSPEROUS AND GROWING WITH A COMBINED POPULATION OF 150,609.<sup>25</sup>

The Nelson urban area (Nelson to Richmond) straddles the border of the Nelson and Tasman regions and is home to 70,000 residents. Blenheim, the second largest township has a population of just over 31,000.<sup>34</sup>

The economies and communities of the three regions are highly interdependent. The Nelson central business district is the main commercial centre across the TOTS. The Nelson and Tasman economies focus on horticulture, forestry, seafood exports, pastoral farming and tourism. The Marlborough district is the largest grape growing region in New Zealand. Viticulture generates high vehicle movements because of the number of workers and visitors. Forestry harvests across the area are projected to increase transport demand. The area attracts strong tourism and is the gateway to three National Parks. The South Island Main Trunk Line and

SH1 provide the key connections for freight and tourism between Picton and Christchurch. The two Kaikōura transport corridors are located between high mountain ranges and the sea. Although both corridors re-opened following a major earthquake in 2016, ongoing disruption from land slips and rock fall, and flooding from coastal storms is expected. Network resilience is becoming a significant issue across the TOTS, with increases in disruptions and costly repairs from significant weather events becoming more frequent.

Other key connections are the state highway links between Richmond and Motueka, Nelson and Blenheim, and SH6 to the West Coast. The ports in Nelson and Marlborough (Picton) play an important role in getting the regions' goods to market with Nelson being the largest fishing port in Australasia. The majority of land-based freight travels via

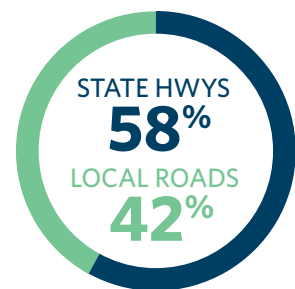
road, as rail opportunities are limited to the South Island main trunk line.

The urban link between Richmond and Nelson has been identified as a key connection to access employment, goods and services. Population growth and the associated demands for improved accessibility, combined with increasing freight movements, are placing the Nelson urban area transport system under increasing strain.

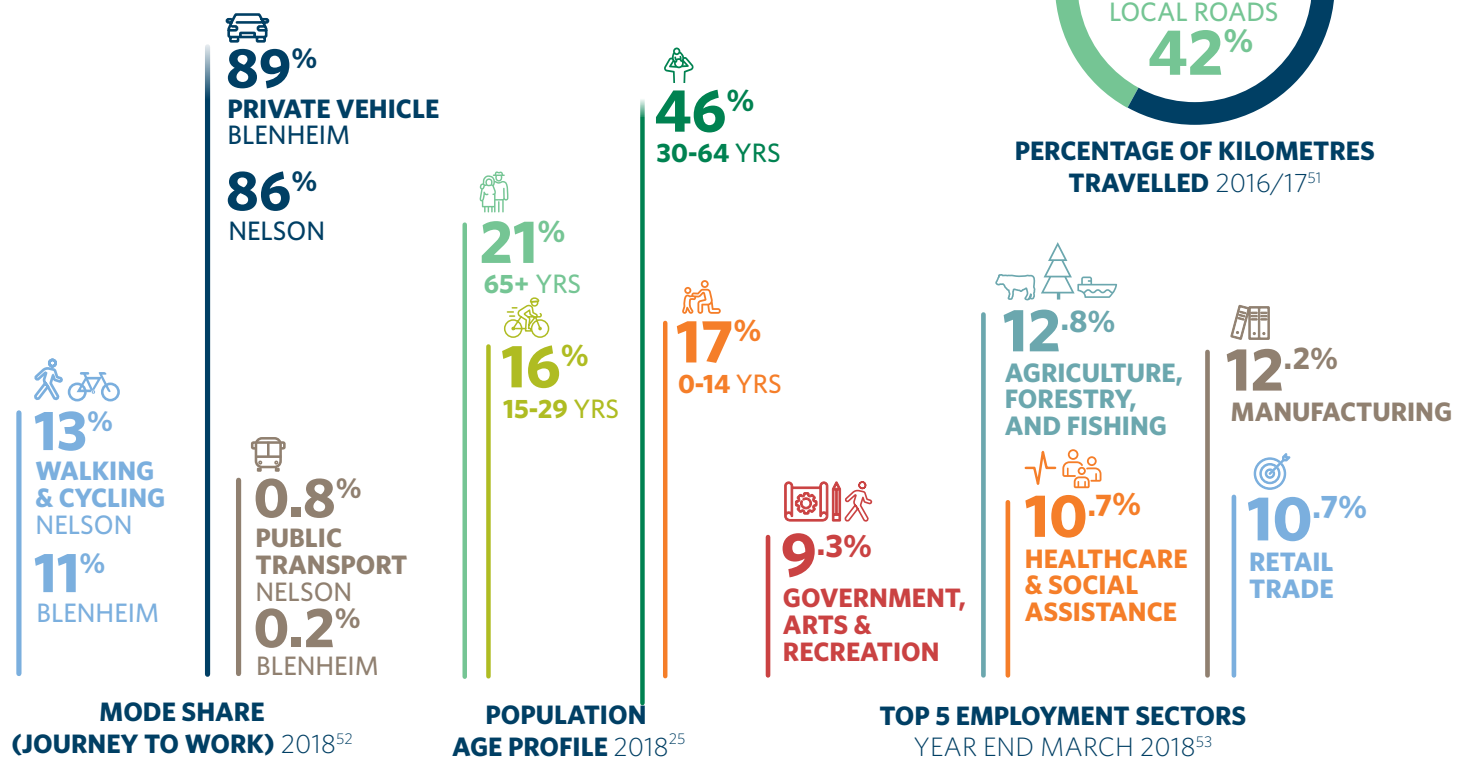
Communities in the TOTS rely on private vehicles to make trips, but less than most other regions. Nelson in particular has a higher share of walking and cycling, reflecting substantial investment in cycling networks over the last 15 years.



**KILOMETRES OF NETWORK IN REGION** 2016/17<sup>40+41</sup>



**PERCENTAGE OF KILOMETRES TRAVELLED** 2016/17<sup>51</sup>



## TOP OF THE SOUTH TOMORROW

Prior to the COVID-19 pandemic, the area's population was projected to increase by approximately 13% to 161,000 in 2043.<sup>27</sup> Growth was expected across the area, with most of it expected in Nelson urban area, which was projected to reach 75,000.<sup>28</sup> Residential growth was concentrated in existing areas to the west and south of Richmond and intensification of existing residential areas in Nelson, while most commercial growth is expected in Richmond.

The TOTS population is aging faster than the national average, with almost 35% projected to be aged 65-years and over in 2043, compared to 24% nationally. A greater range of transport options will be needed, supported by new technologies, to ensure good access to essential services and recreational activities continues for all ages.

Impacts of COVID-19 on employment will result in a fall -6.7% in Nelson jobs, this is line with the national average. Marlborough is slightly higher at -7.3%.<sup>35</sup> Nelson is projected to have the strongest job growth over the medium-term and employment levels should return to near BAU by 2025.<sup>35</sup>

Economic drivers are expected to remain consistent with employment in the service sector concentrated in the larger urban centres. Fisheries, horticulture, viticulture and forestry will continue to be important, along with manufacturing and health and are likely to remain relatively stable during the recovery period.

International tourism was forecast to grow but will be impacted by COVID-19, at least in the short to medium-term. Domestic tourism may increase in the short-term, offsetting some of the decline.

The passenger and freight gateway at Port Marlborough (Picton) and Port Nelson will continue to play an important role linking freight and tourism between the North and South Islands and beyond. Development of the Waimea Community Dam will lead to increased productivity in the region and associated freight demand. The Picton Ferry Terminal upgrade will improve rail services by expanding the docks and upgrading the passenger terminal.

Increased rainfall, coastal and soil erosion, sea level rise, storm surges, flooding, slips and storms are predicted to intensify over the next 30 years bringing increased risk to communities and the land transport system. Erosion is a key risk along the Buller Gorge. These events will add to existing resilience issues in the area. Tasman, along with Canterbury and Otago, have the highest estimated value of roading infrastructure exposed to the risk of sea level rise. The increasing impacts of climate change will place even greater pressure on councils' ability to maintain networks and fund new infrastructure and services. Frequent rockfall on SH6 stretch between intersections with SH65 and SH63 (Murchison to St Arnaud) are considered a high priority for the TOTS. Seismic risk associated with the Alpine Fault is also significant across the South Island.

Rural and remote communities will look for improved connections to the Nelson and Blenheim urban areas for their young people to access education and work, and for senior residents to access health, social services and recreational activities.

Emerging technologies, such as on-demand shuttles, could provide a feasible shared transport option in the future to help people get around within these communities, and improve access to services in Nelson and Blenheim. Improved access to high-quality data and information will enable better management of the existing transport system to get the most out of existing infrastructure.

### KEY SYSTEM INSIGHTS

- The Nelson urban area is forecast to receive the majority of population growth. This growth, combined with forecast increases in freight transport is placing the Nelson urban area transport system under increasing strain, especially the corridor through Richmond and into Nelson.
- Modest population growth is forecast for Blenheim. However, significant growth in viticulture is expected, with associated impacts on the location of employment opportunities, and the movement of workers and heavy vehicles during harvest periods.
- The population is aging faster than the national average across all three regions.
- A high proportion of journeys to work are by private vehicle with a limited number of bus services available for work travel in Blenheim. The Nelson urban area has the highest share of people walking and cycling in the country, and public transport use in that area has doubled in the past five years. Further mode shift is being hampered by busy arterial routes severing communities. This also reduces the attractiveness of active modes and delays public transport using these roads.
- Road and rail links down the East Coast are critical for the movement of freight and tourism between Picton and Christchurch, while the Nelson and Picton ports play an important role in getting the regions' goods to market.
- Coastal communities and transport networks will be impacted by more severe weather patterns, particularly in coastal and hill areas. This is expected to be increasingly impacted by climate change, storms and sea level rise. Seismic risks associated with the Alpine, Waimea and Wairau and Faults are also significant.
- The safety record for the TOTS is particularly poor in the urban areas, at intersections and involving cyclists, and in Nelson involving older road users.

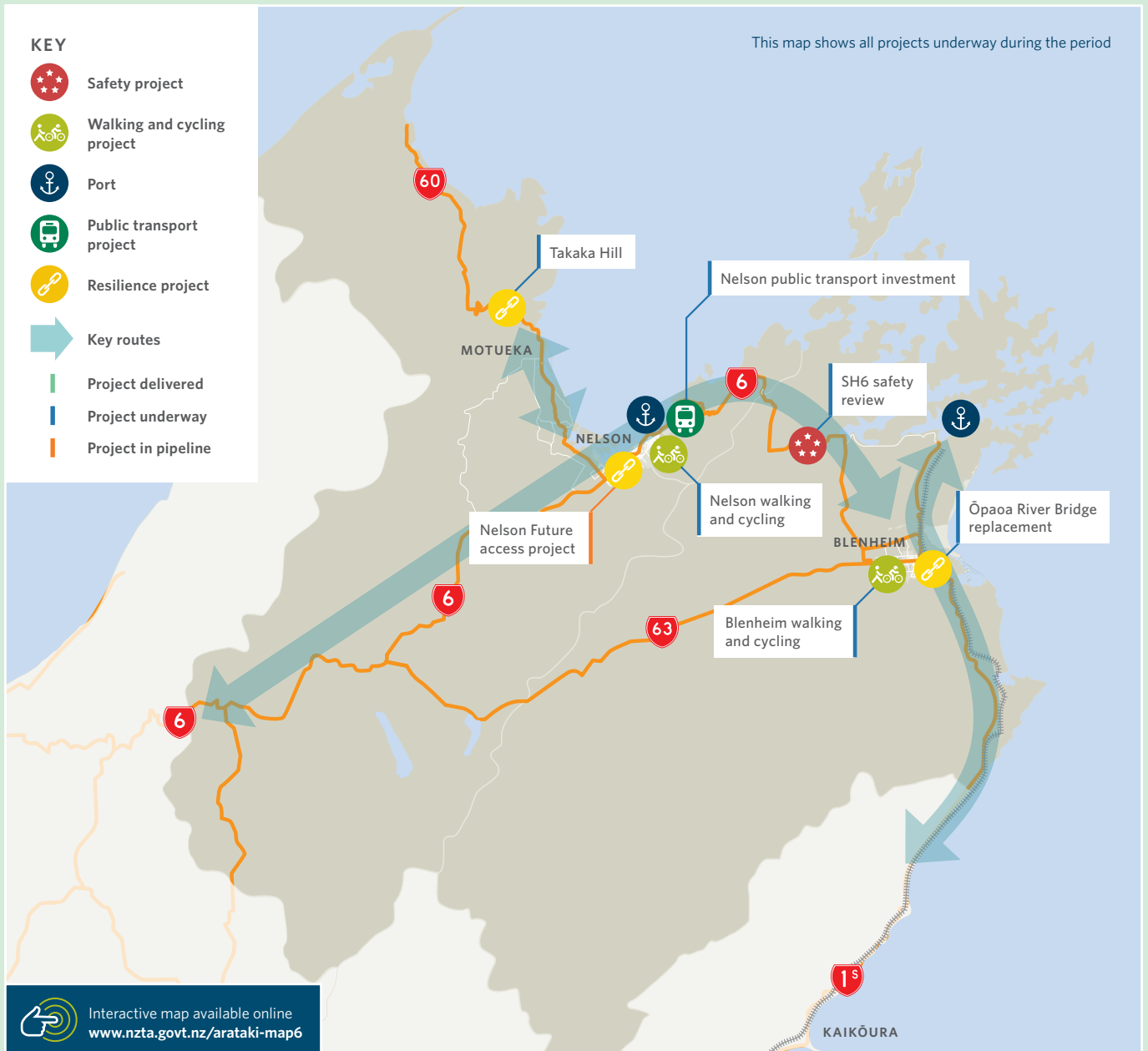
## FOCUS OF EFFORT: 2018-21

This section represents the existing commitments (eg the NLTP and NZUP). V2 has not been updated to include economic stimulus packages as that space continues to evolve.

We will focus on progressing the Nelson Future Access Project through a detailed business case and supporting the Richmond Network Operating Framework. The Future Access project will look at the Rocks Road and Waimea Road corridors and access across all transport options to get people and freight, safely and efficiently, in and out of Nelson. The business case will also look to better link the land transport network with Nelson Port, ensure there are safe and accessible walking and cycling facilities, and consider public transport improvements.

Other key activities include:

- Investment in public transport in Nelson urban area to improve services both within and between Nelson and Richmond.
- Consideration of further extension of the Nelson cycleway network and completing a key link between Annesbrook and the beach at Tahunanui providing better access.
- Construction of the Ōpaoa River Bridge (SH1, Blenheim) to provide better access for high productivity motor vehicles travelling from Picton to Christchurch.



## AREAS OF FOCUS: TOP OF THE SOUTH ISLAND 2021-31

### TACKLE CLIMATE CHANGE (HIGH: NELSON, TASMAN, LOW: MARLBOROUGH)

We will continue to work to understand the risks and opportunities to support climate change adaptation and mitigation.

#### ADAPTATION

We will focus on:

- engaging in local planning processes to avoid infrastructure and development in areas at increased risk of natural hazards and effects of climate change, eg Atawhai, Tahunanui Beach, Mapua, Takaka, Takaka Hill, Marahau, Brooklyn, Riwaka, Motueka, Ruby Bay and the Wood
- working with our partners and communities to prioritise interventions and responses to natural hazards in high-risk areas
- enabling continuous improvement in network resilience through maintenance and renewals, and 'low-cost/low-risk' investments
- enabling quick recovery following disruption to the land transport system.

#### MITIGATION

We will focus on:

- engaging in local planning processes to ensure urban form and transport planning supports reductions in emissions, private vehicle travel and average trip length
- ensuring network design and operation makes the best use of existing systems to manage demand and reduce emissions by prioritising the movement of public transport and low emission options, and actively managing speed, urban freight and congestion.

### IMPROVE URBAN FORM (MEDIUM)

While our focus on this step change is on multi-agency partnerships in the largest and fastest growing urban centres, we recognise the potential for growth in and around Nelson and Blenheim to support safe and thriving cities, with increased access to public transport, walking and cycling options and reduced carbon emissions. We will engage in planning processes to support a well-integrated and well-designed land-use and transport system that:

- enhances existing communities, making them a better place to work, live and play
- supports an increase in active modes, including trips by foot, bike and e-scooter etc
- reduces the need to travel long distances to access employment and services
- results in lower emissions per capita
- maintains or improves the safety and efficiency of the transport system.

### TRANSFORM URBAN MOBILITY (MEDIUM)

In urban areas we will support efforts to increase transport choice and reduce reliance on travel by private motor vehicles. Our focus will be on:

- improvements to walking and cycling networks, with a focus on providing safe and efficient access to and within activity centres, and to schools, and linking existing infrastructure to provide connected networks
- public transport options, including on-demand services, where they give access to employment and essential services, are a more affordable transport option and help shape a more thriving city
- proposals and services to improve mobility for senior residents
- development and implementation of the findings from the Nelson Future Access Project and the Richmond Programme Business Case including optimising the network to maximise efficiency when justified by increasing transport demand.

### SIGNIFICANTLY REDUCE HARMS (MEDIUM)

#### SAFETY

Support implementation of the Road to Zero Safety Strategy for New Zealand and associated Action Plan (2020-22), and regional safety strategies, with a particular emphasis on:

- Nelson and Blenheim urban areas, SH6 between Blenheim and Nelson, SH1 south of Blenheim and high-risk rural roads (rural roads are roads with speed limits >80kmph)
- safety treatments targeting high-risk intersections, and run-off road crashes on high-risk rural roads
- separated facilities for vulnerable users, in areas with significant vulnerable usage
- target road policing and behaviour change programmes with a focus on speeding, with increased use of safety cameras in some areas
- speed management to provide safe and appropriate speeds on high-risk rural roads.

#### HEALTH

Our approach to delivering better health outcomes, particularly the reduction of harmful emissions, will primarily be through initiatives that target other step changes, including improved urban form, increasing access to and use of public transport, walking and cycling, and efforts to reduce carbon emissions.

We will support future pandemic planning by drawing our COVID-19 experience and initiative such as low-cost and temporary street calming and active transport projects that enable social distance while bringing health benefits from increased physical activity and reduced air emissions.

We will also continue to work to ensure that the noise impacts of transport are appropriately managed through land-use planning.

