



# Transport Outlook Overview 2016

A summary of New Zealand's transport system



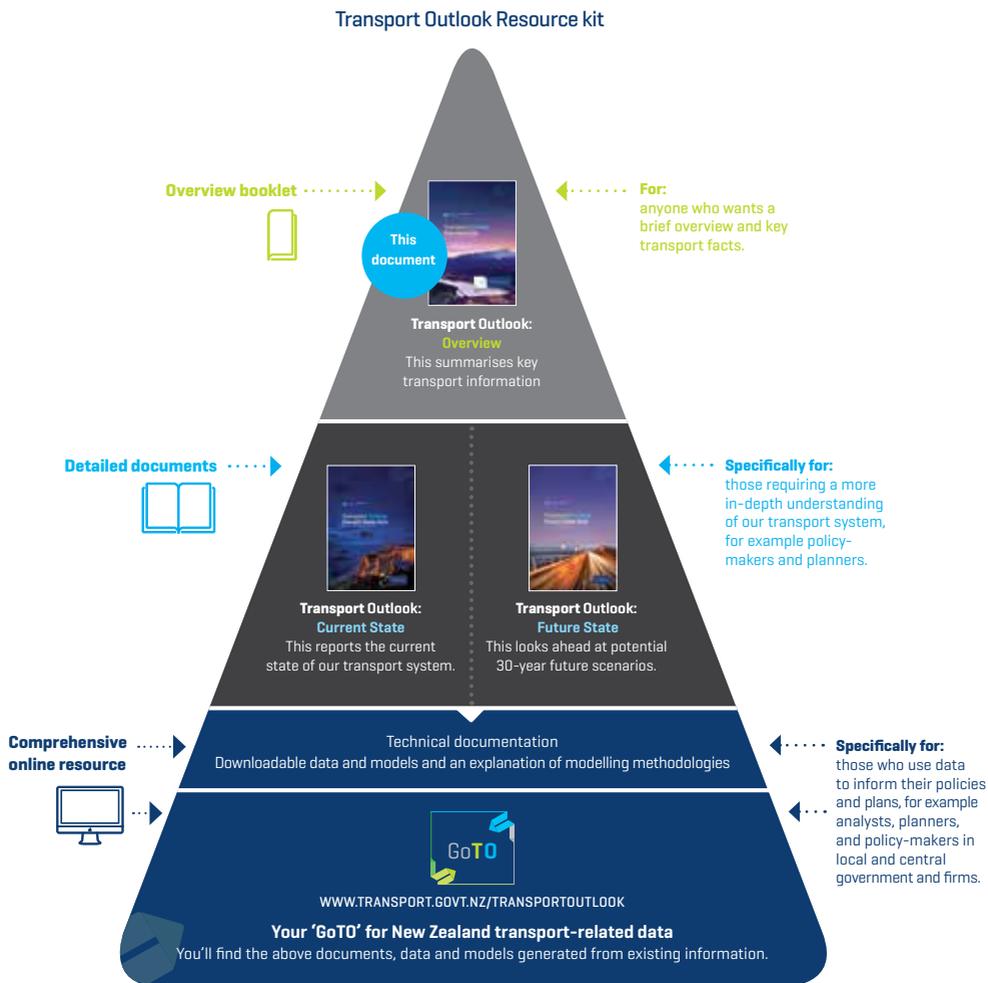
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Your 'GoTO' for transport-related data  
June 2017

# About this report

Transport plays a major role in New Zealand's society and economy. Transport contributes to job creation and our social, cultural, and sporting interactions, and it supports growth in international trade and tourism.

This *Transport Outlook Overview 2016* booklet provides a quick view of our transport system, and is part of the Transport Outlook resource kit. To explore these resources, visit [www.transport.govt.nz/transportoutlook](http://www.transport.govt.nz/transportoutlook)



# Me mātau ki te whetū, i mua i te kōkiri o te haere

*Before you set forth on a journey, be sure you know the stars*

In the past, we referred to the stars to help show us the way.

Nowadays, we live in a world full of emerging technology – but knowing how to access the right data to help guide us forward is not easy.

This is why we have created this Transport Outlook.

It gathers, collates, and analyses different clusters of transport-related data to help us navigate where we should go.

We call this Transport Outlook our 'GoTO', as it will play an increasingly pivotal role in helping to steer the New Zealand transport sector forward.



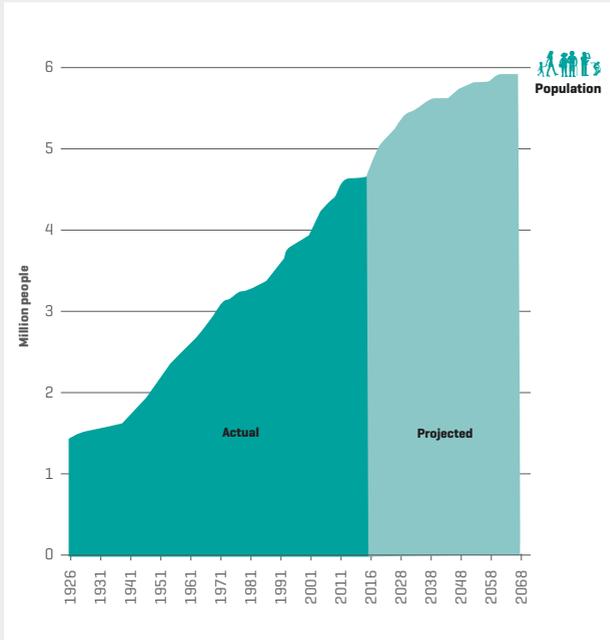
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# Our transport system is facing growing demand

Our population is growing

## New Zealand population<sup>1</sup>



- A growing population lifts demand for transport services and use of infrastructure...

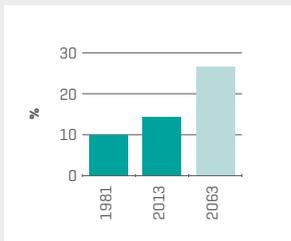
...but population distribution and growth are uneven: half of the population lives in the Auckland-Waikato-Bay of Plenty area



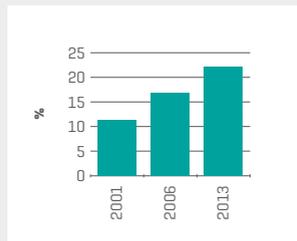
- Our population is ageing and more older people remain active in the work force, adding to demand for transport to work



## % of population aged 65+<sup>1</sup>



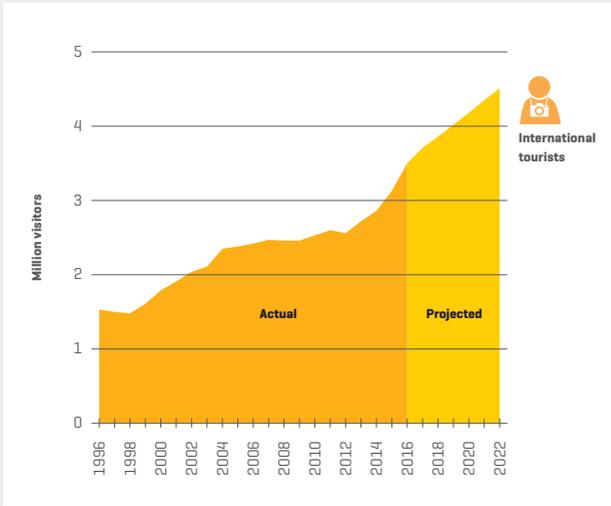
## % of population aged 65+ in the workforce<sup>1</sup>



At the other end of the age spectrum, younger New Zealanders have different lifestyles and attitudes: fewer young people are applying for their driver licence

We're welcoming a lot more overseas visitors

### International tourists visiting New Zealand<sup>1,2</sup>



Over **36,000** aircraft arrived in New Zealand in 2016, just over double the number in 1998

On average planes are carrying more passengers

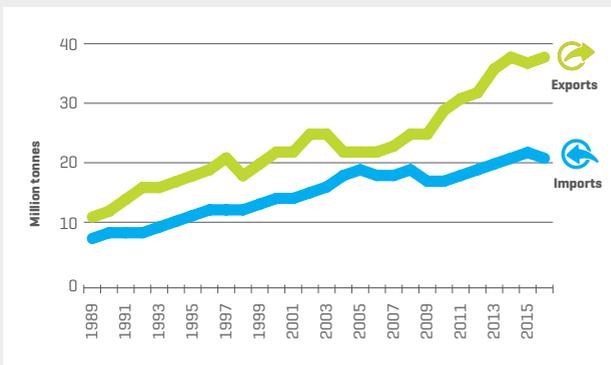


**Tourism** is a key sector for New Zealand: it creates demand for travel by air, rail, ferry, and road [buses and rental cars] and movement of goods to our tourism hotspots



Transport is important for our trade with the world

### Commodity imports and exports from sea ports<sup>1</sup>



- Over the last ten years our imports have increased by 17% and exports by 74% [by volume]
- Exports and imports are expected to keep growing and to be carried on much larger freight vessels
- Good rail and road connections to our ports and airports are important to support that growth



In terms of \$ value, our main export commodities are dairy products, meat, logs and wood, fruit, machinery and equipment, fish and seafood, and wine

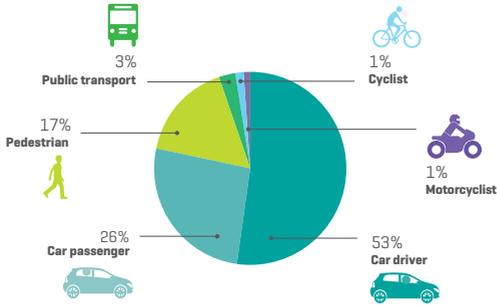


In terms of \$ value, our main import commodities are machinery and equipment, vehicles and parts, petroleum, textiles and plastics



# We travel in many different ways

## Use of transport modes for trips<sup>3</sup>



2010/14

New Zealanders spend on average just under **one hour** a day travelling



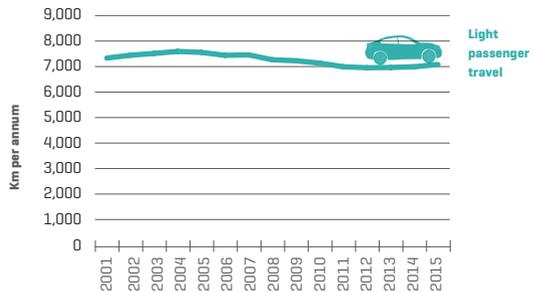
We use our cars and SUVs for most of our daily trips

Two-car households [**38.4%** of all households] are now more common than households with only one car [**37.6%** of all households]<sup>1</sup>



... our average per capita travel by car has been levelling off with a recent uplift (up over 2% since 2012)

## Per capita car travel<sup>8</sup>



We're also walking and cycling less

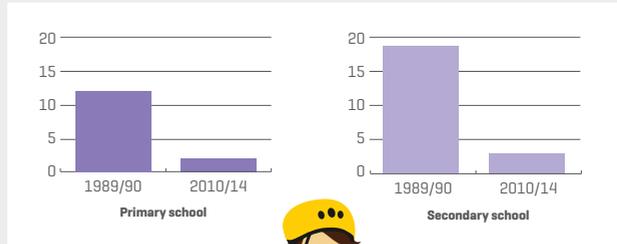
### Average trips per annum<sup>3</sup>

	1989/90	2010/14
Walking	1,080	930
Cycling	180	73

New Zealanders walk less than one hour per week



### % of children cycling to school<sup>3</sup>

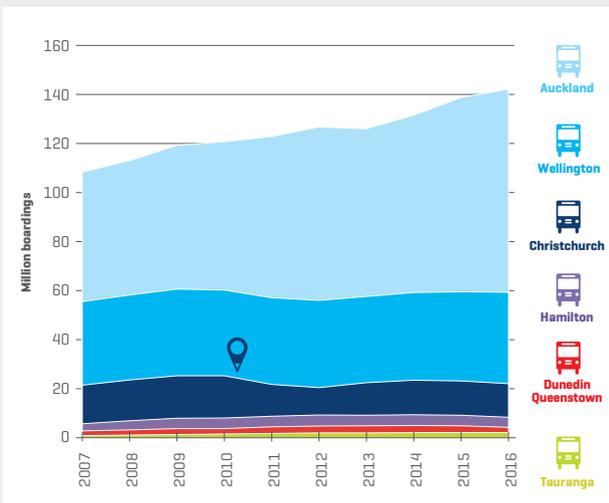


Fewer school children are biking to school



We use public transport for 3% of all trips

### Public transport use<sup>4</sup>



- Public transport use has been increasing in Auckland and Wellington



- Growth in other cities is slower, or patronage is in decline

- Christchurch patronage is yet to return to pre-earthquake levels



# Air transport

## Domestic airports

35 airports have scheduled domestic passenger services

35  
Airports

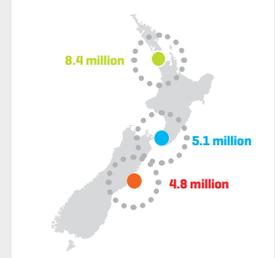


## International airports (international passengers)

International flights service five airports: Auckland, Wellington, Christchurch, Queenstown, and Dunedin



## Hub airports (domestic passengers)



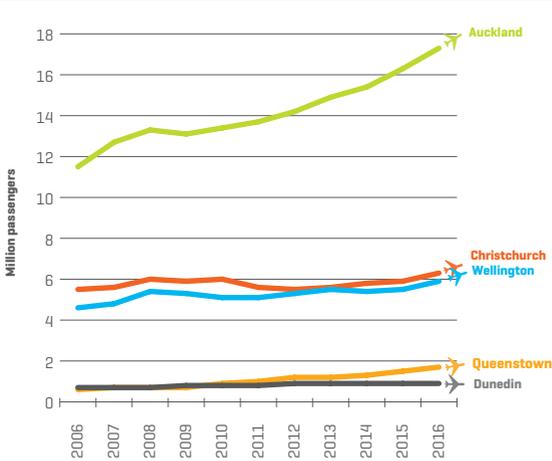
Auckland, Wellington, and Christchurch are hub airports: almost all domestic passengers pass through these airports

About **38 million** passengers used our airports in 2016: 25 million on domestic flights and 13 million on international flights

38  
million



## International and domestic passengers through our main airports<sup>5</sup>



✈️ **AKL** About 3/4 of international passengers and 1/3 of domestic passengers pass through Auckland

✈️ **ZQN** Queenstown is our fastest growing airport in % terms

✈️ **NSN** Nelson is not an international airport but has more domestic passengers than Dunedin

### Infrastructure

Sound airport infrastructure and land transport access are required to cope with growing passenger numbers



### Air freight

Air freight carries less than 1% of our trade by volume, but about **16%** of our exports and **22%** of our imports by \$ value



### Largest airport

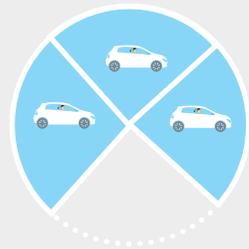
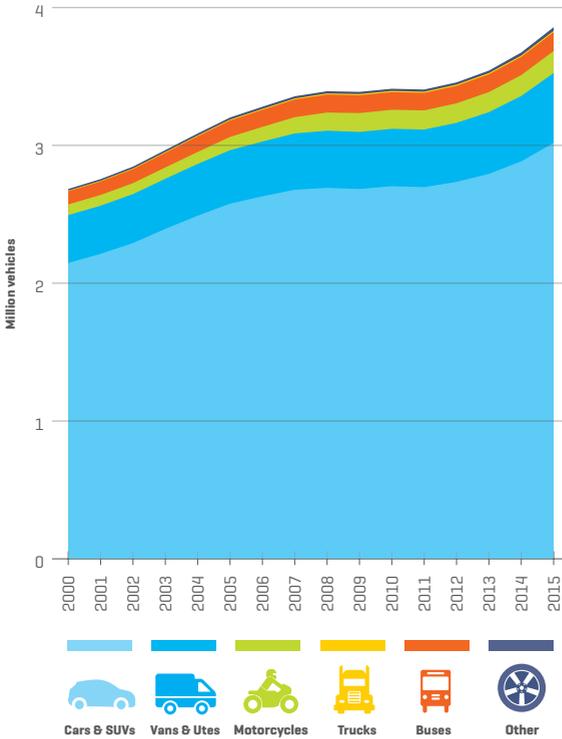
By \$ value, Auckland International Airport is our **third largest export port** and **second largest import port**<sup>1</sup>



# Road transport

Our vehicle fleet has grown by 44% since 2000

Vehicle fleet<sup>8</sup>

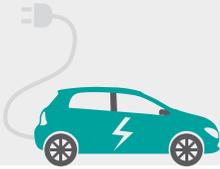


Cars and SUVs make up about **three quarters** of the vehicle fleet

### Electric vehicles

Electric vehicles (EVs) represent less than 0.1% of the vehicle fleet but registrations are increasing

The number of EVs more than doubled in 2016 to 2,430



### Roads and highways

New Zealand has 10,855 km of State highways and 84,150 km of local roads



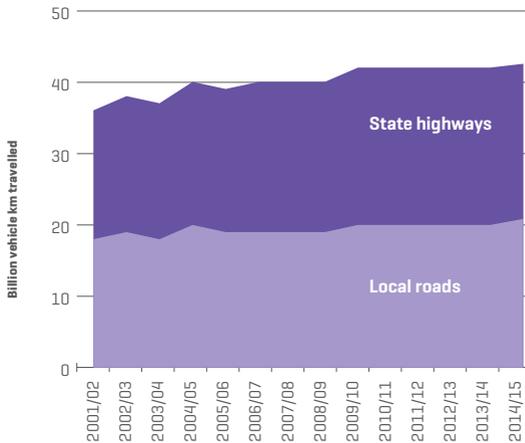
### Why the increase?

Travel on the roads has increased with growth in the:

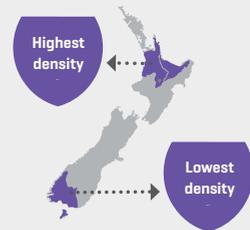
- population
- vehicle fleet
- tourism



### Distance travelled on local roads and State highways<sup>8</sup>



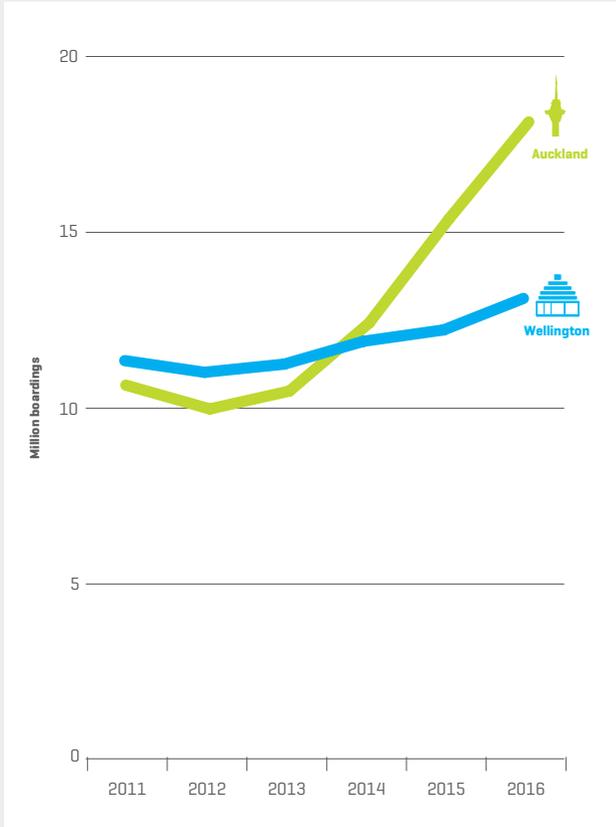
Waikato and the Bay of Plenty have the **highest density** of State highways; Southland has the **lowest**



# Rail transport

Rail provides an important public transport service in Auckland and Wellington, and a long-distance service on weekdays between Palmerston North and Wellington

Train patronage in Auckland and Wellington<sup>6</sup>



Train patronage in Auckland has grown by 67% over five years. During 2016 alone, patronage grew by 18%



## Auckland

Auckland train patronage has grown with service and infrastructure improvements

The new City Rail Link in Auckland will help support growth in the use of commuter rail



## Long-distance passenger services

Long-distance passenger services (Wellington to Auckland, Picton to Christchurch, Christchurch to Greymouth) cater increasingly to the tourist market



## KiwiRail

KiwiRail carries both bulk commodities and container freight – its market share is about 16% of total road/rail freight based on tonnage and distance travelled<sup>9</sup>



# Maritime transport

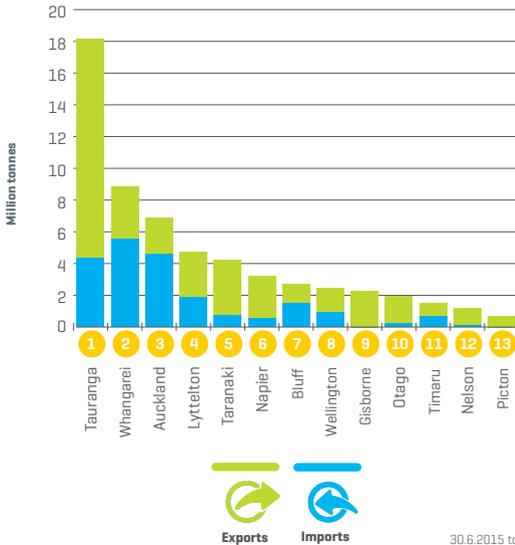
## New Zealand ports

13

- New Zealand has 13 ports:
- ten are container and bulk ports
  - three handle bulk cargo only



## Exports and imports from New Zealand ports<sup>1</sup>



Marsden Point is where most of our oil comes in

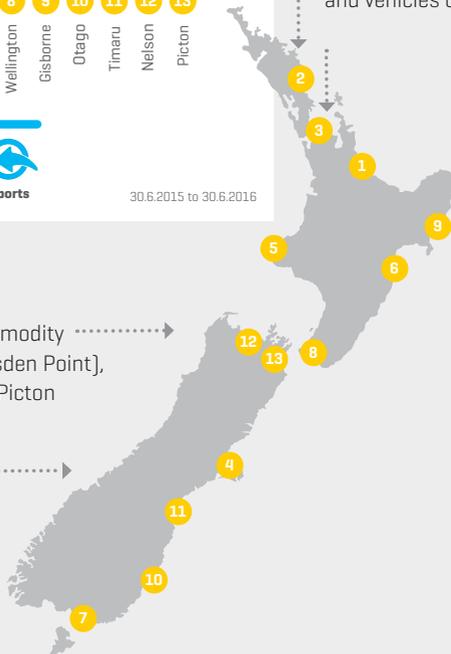


By \$ value the port at Auckland handles over half of our maritime imports: it's where most of our consumer goods and vehicles come in



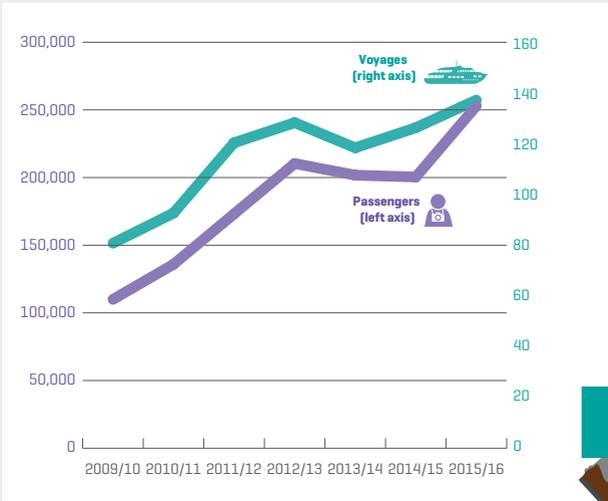
Logs are an important export commodity for ports such as Whangarei [Marsden Point], Gisborne, Nelson, Wellington, and Picton

About two thirds of our exports by volume are bulk products such as logs, chemicals, and oil



Our ports are welcoming a growing number of cruise ship passengers

### Cruise ships and passengers visiting New Zealand<sup>7</sup>



Cruising is gaining in popularity, requiring infrastructure to cater for bigger cruise ships



### Wellington–Picton ferries

The Wellington–Picton ferries play an important connecting role for freight, and carry about 1.1 million passengers each year – about one third are overseas tourists



### Freight

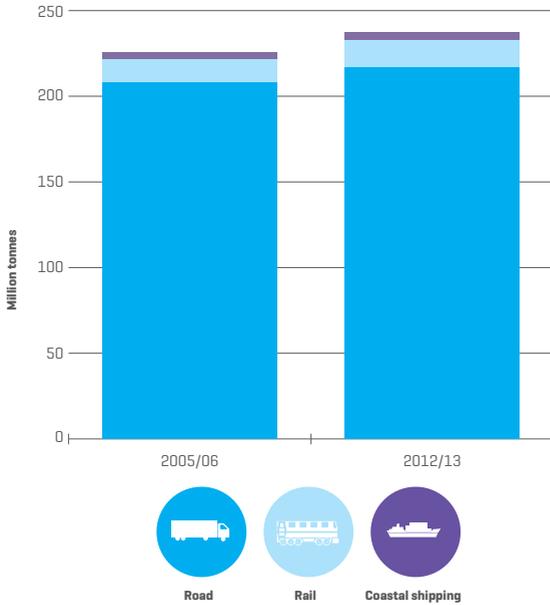
Vessels move 14% of our freight based on tonnage and distance travelled, mostly bulk commodities such as petroleum products and cement, around the coast and between islands



# Freight movements

Freight is carried by road (trucks), rail, air, and on coastal vessels

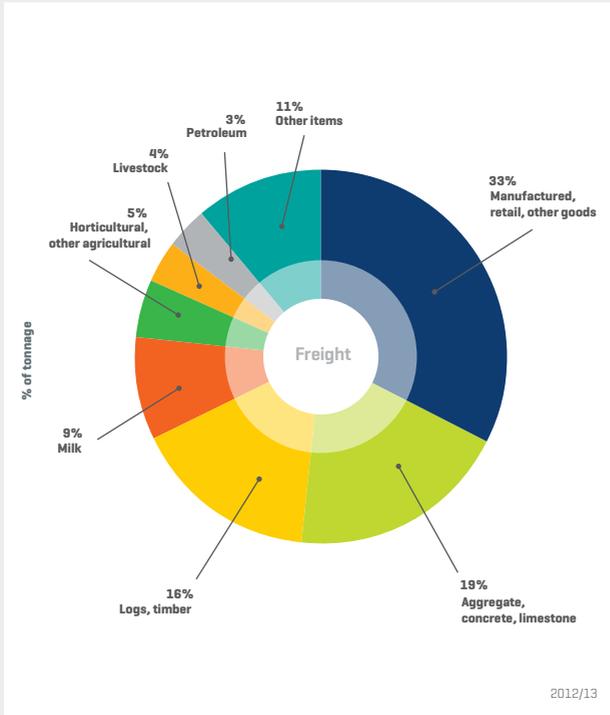
## Freight tonnage<sup>9</sup>



Road carries more than **90%** of our freight tonnage



## Breakdown of freight commodities [% of tonnage]<sup>8</sup>



Almost **one third** of freight by tonnage are manufactured, retail, and other goods



### Localised movements

Freight movements are very localised: **77%** of freight tonnage is moved within the same region where it is sourced



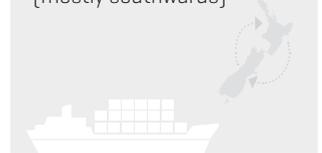
### Golden triangle

**42%** of freight tonnage is moved in the Auckland – Waikato – Bay of Plenty area



### Between the main islands

Only **2.2%** of freight tonnage is moved between the North and South Islands [mostly southwards]



# More information

In this *Transport Outlook: Overview 2016* document we provide a quick view of our transport system.



The information comes mainly from the New Zealand *Transport Outlook: Current State 2016* report that summarises the state of our transport system across all modes. It is available at [www.transport.govt.nz/transportoutlook](http://www.transport.govt.nz/transportoutlook) along with further data and statistical indicators.

For further information, contact [transportindicators@transport.govt.nz](mailto:transportindicators@transport.govt.nz)



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**Sources**

- 1 Stats NZ
- 2 Ministry of Business, Innovation and Employment for projections
- 3 Ministry of Transport New Zealand Household Travel Survey
- 4 Auckland Transport, Greater Wellington Regional Council, Environment Canterbury, New Zealand Transport Agency
- 5 Airport annual reports and other public sources
- 6 Auckland Transport and Greater Wellington Regional Council
- 7 Cruise New Zealand
- 8 Ministry of Transport analysis
- 9 Ministry of Transport National Freight Demand Study

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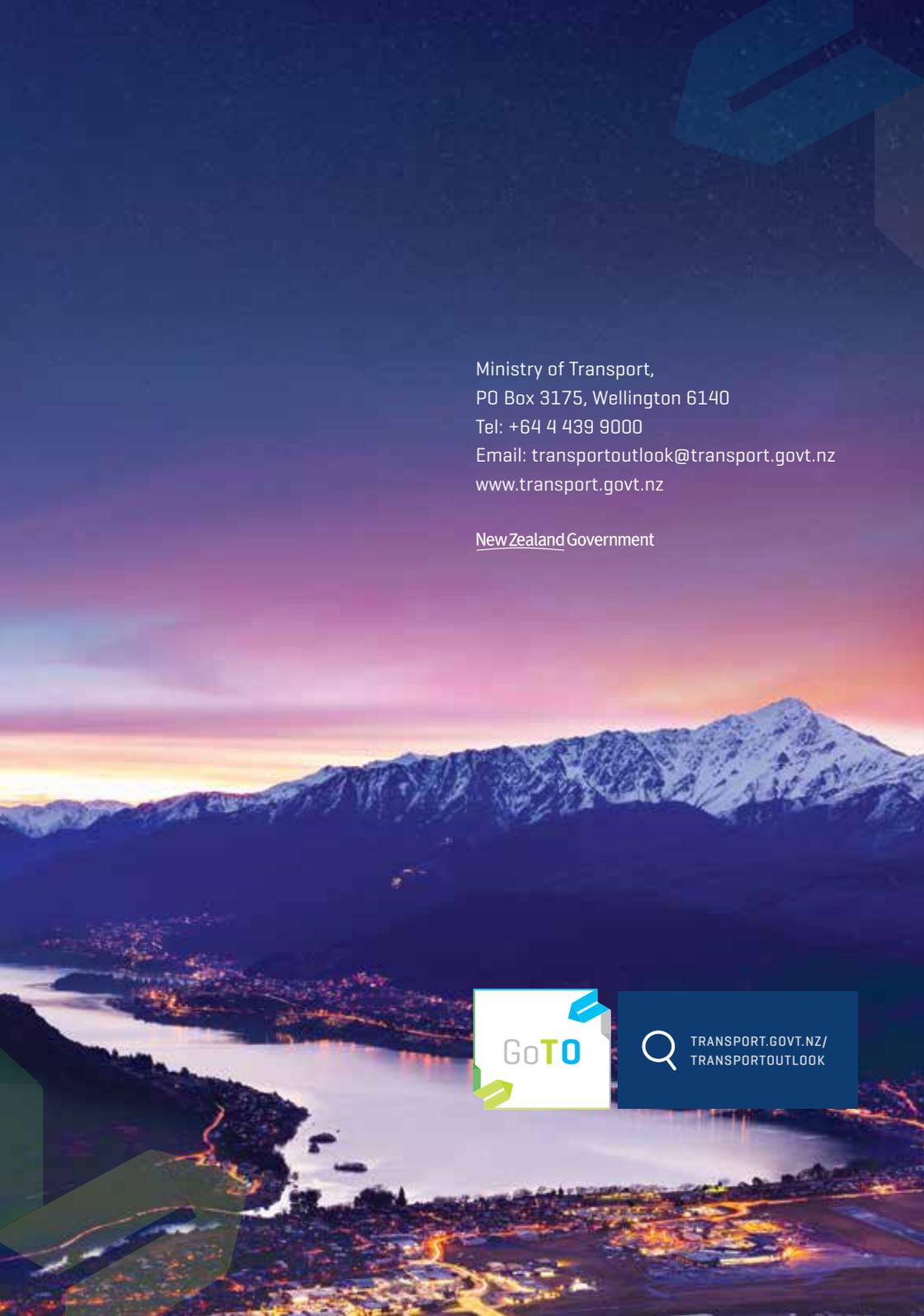
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