BLENHEIM

Town Centre Health Check

DECEMBER 2023 – FEBRUARY 2024

MARLBOROUGH
DISTRICT COUNCIL

Blenheim Town Centre Health Check 2024

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The research for this report, and production of the report was carried out by Freya Thompson over the summer period of 2023/24.

Executive Summary

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In terms of the trends and comparisons observed in this study, the Blenheim CBD remains relatively similar to assessments conducted in 2022. The town centre continues to perform well across most measured categories including transport, pedestrian route quality, state of the environment and street vitality. However, there was an increase in vacancies compared to the last survey. Another trend observed was the ‘rest of Blenheim’ contribution becoming more significant to total spend than the CBD’s. The pedestrian survey highlighted that some areas have improved such as the library/Quays area, but further investment elsewhere may need to be considered - as a majority of respondents felt that the town centre has not improved over the past two years.

Purpose

The 2023-24 Blenheim Town Centre Healthcare Check is a report in continuation from six previous checks in 2011, 2014, 2016, 2018, 2020, and 2022 respectively. The purpose of this project is to critically analyse and capture photographic data around the Blenheim Central Business District (CBD) consisting of different health indicators, which can then be further analysed to illustrate trends and comparisons from previous years.

Main Survey Findings

Composition of the Town Centre

- Comparison (i.e retail) (24%) Service (22%, and Office (21%), business types are most frequent within the CBD
- Vacancy rates have increased from the 2022 survey at 5.7% in 20 units, to 8% in 27 units.
- Comparison type businesses have also continued to decrease moving from 92 units in 2020, to 84.

Transport Facilities

- The CBD continues to offer parking spaces sufficient to demand
- Cycle facilities have increased since previous checks
- There is public transport provision with the Blenheim Bus and Marlborough Taxis still operating with an additional Blenheim Cab service.

Pedestrian Routes

- CBD pedestrian routes have remained at consistent quality to the 2022 check
- Two new popular routes have been observed in accordance with the development of the new library

State of the Environment

- Locations surveyed primarily remained consistent with the previous check

Vitality of the Town Centre

- Street edges/fronts remained at a similar level of vitality
- Central CBD continued to show higher levels of street-front vitality than east/west sides of the CBD owing to the composition of businesses in this area

Pedestrian Survey

- 297 responses were collected for the Blenheim CBD
- 73% of respondents found that the CBD was easy to access
- The main reasons people stated for visiting Blenheim CBD were visiting café/restaurant followed by non-food shopping
- Most pedestrians using the CBD visit weekly and average time spent in the town centre was an hour.
- Metered street parking was identified as the most popular option (32%), free limited time street parking (31%)
- 58% of respondents said the CBD hadn't improved over the last two years.

Blenheim CBD Spending

- Blenheim CBD accounts for 48% of Blenheim's total spend compared to 52% in 2020, and 2021.
- Groceries and liquor (29%) and department stores and leisure (27%) were the main areas of spend.
- Visitors spent $213.1 million in Marlborough in 2023-24, whilst Marlborough residents spent $130.3 million outside of the region, giving a net positive inflow of $82.9 million.

Background and Methods

The 2023/24 Blenheim Town Centre Health Check is the seventh continuous report of its kind produced by the Marlborough District Council. It is based off methodology used by local UK authorities who are required to undertake a health check of the town centre in planning and policy. To achieve consistency in the report's findings, the approach to gather data around the CBD followed previous methods. To ensure valid and accurate comparisons could be made, the study area of the Blenheim CBD was an exact copy of the version used during previous health checks (Appendix A).

The 2023/24 Blenheim CBD health check was conducted and produced over the months of December 2023 and January 2024, over several days and various weather conditions. Across each area of gathering information, huge emphasis was placed on following previous surveying methods in order to maintain consistency and to ensure each method could be replicated for future health checks.

The unusual use of the term "health check" incorporates a range of determinants which collectively, can be used to gain an understanding to what a healthy town centre could look like, whilst also giving a general snapshot in time of how well the town centre is performing. By carrying out this check over time we can therefore see the progress being made.

The key methods of research used during the health check were:
A desktop study of existing data including Town Centre Health Checks 2011, 2014, 2016, 2018, 2020, and 2022.

Primary research via a walking survey conducted in the town centre to identify:

- The daytime composition of the town centre (Appendices B – C)
- Pedestrian route quality (Appendix D)
- Transport facilities
- State of the environment (Appendices E – G)
- Vitality of street edges (Appendix H)
- User views of the town centre via a pedestrian survey (Appendices I – J)
- Visual documentation via a photo survey (Appendix K)

Town Centre Health Check 2022 Conclusions

It is important to include the previous town health check's conclusion in order to provide a comparative summary to track CBD progress and context for this report. It gives insight into the overall state of the CBD, and compares trends brought forward from the survey to make judgement on future planning.

In terms of the trends and comparisons over time from this study, the Blenheim CBD is fairly similar to research conducted in 2020. Street vitality, pedestrian routes, and the state of the environment are all fairly consistent with the previous check. Vacancies are decreasing, and pedestrians are generally happy with mobility around the CBD, as well as necessities provided. Although, pedestrians are still seeking more from the CBD regarding improvements, including food and retail stores, pedestrian friendly areas, and a cohesive vibe throughout the CBD.

It seems as though Blenheim pedestrians are looking for the same developments year after year, given the decreasing percentage of people who think the CBD is improving each health check. Financially, the Blenheim CBD is operating healthily, despite all uncertainty across the globe. Although the CBD has remained fairly similar to the previous check, the overall quality is reasonably high, adequately providing to the Blenheim community.

BBA (Blenheim Business Association) Commentary

Blenheim CBD Composition

Purpose

By gathering information on the frequency and combinations of business offerings available, we can better understand the composition of Blenheim's CBD and what it has to offer. It is also important in order to draw comparisons around broader changes and trends happening from year to year.

Method

In order to remain consistent with previous health checks and to illustrate accurate progress, the categories used to determine the business in each building were the same as previous checks. The definition for each category is as follows:

- **Convenience:** Shops that deal with basic consumable need, e.g., supermarkets, grocers, butchers, bakeries, newsagents, and dairies, etc.
- **Comparison:** shops that deal with most other goods, e.g., clothes, electronics, furniture, car sales yard, etc.
- **Food and Entertainment:** Outlets that provide food and/or entertainment, e.g., restaurants, bars, takeaways, cafes, children entertainment centres, museums, art galleries, etc.
- **Residential:** Residential property that falls within Blenheim's Town Centre perimeter.
- **Offices:** General office space, e.g., lawyers, estate agents, travel agents, etc.
- **Service:** Outlets that are service based, e.g., schools, community centres, churches, banks, hairdressers, libraries, post offices, health centres, etc.
- **Tourist Activity:** Businesses which are primarily providing a service that serves the tourist community in Blenheim, e.g., boat cruises, etc.
- **Industrial:** Businesses which occupy a large space for certain activities, e.g., engineering plants, factories, warehouses, light manufacturing plants.
- **Trade/Retail:** Businesses which provide a service and/or provide consumable items specific to a certain activity, e.g., mechanics, tyre sales, paint supplies, glass repairers, etc.
- **Inner CBD Accommodation:** Accommodation that is available within the town centre perimeter, e.g., motels, backpackers, hotels, etc.
- **Vacant:** Any empty space in the town centre.
- **Demolished:** Buildings that were present in previous health check but are no longer present.
- **N/A:** Buildings which do not fit the above categories are classed as N/A, e.g., unidentifiable buildings, garages, storage rooms detached from a main building, ground floor entrance ways to second story businesses, etc. Buildings under renovation or temporarily closed were also classified as N/A. These were not included in final calculations.

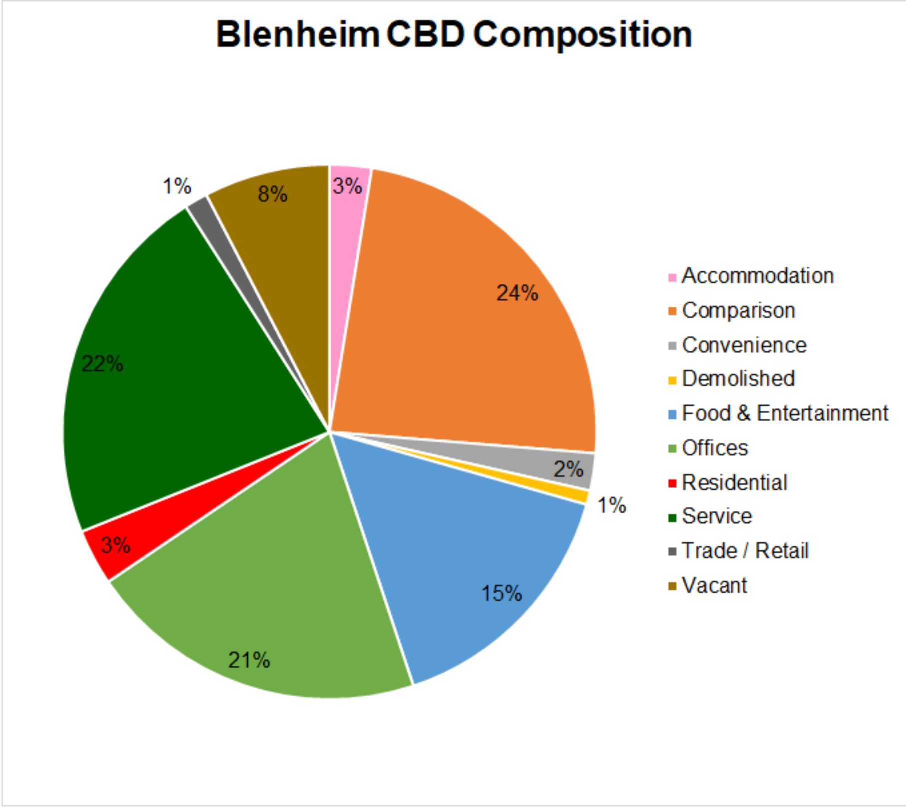


Figure 1: Pie chart showing the composition breakdown of the different business categories in Blenheim's CBD

<u>Findings</u>

The gathered composition data clearly indicates four key business types that makeup 82% of Blenheim's CBD (Figure 1). Comparison takes up 84 units of the town centre, Service has 78, Offices have 73, and Food and Entertainment have 55. These businesses provide necessity items and services to Blenheim residents and so this result is generally expected. It is important to note that the percentage of 'Office' business types may in reality be higher than what is displayed in the data. This survey only accounts for street-level businesses and many offices are located on the first floor of CBD buildings with the entrances classified as N/A.

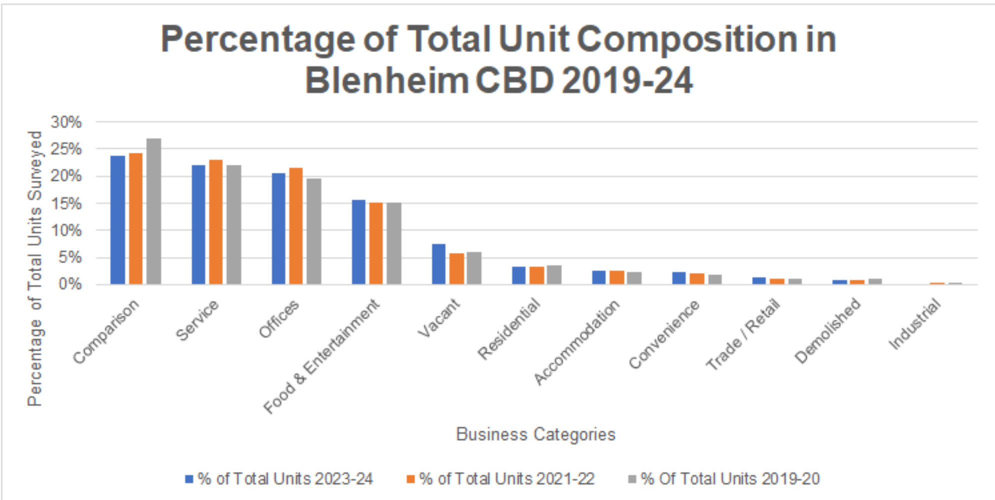


Figure 2. Graph identifying the trends between 2019 and 2023/24 for each business category.

Category	Number of Units 2023-24	% of Total Units 2023-24	Number of Units 2021-22	% of Total Units 2021-22	Number of Units 2019-20	% Of Total Units 2019-20
Comparison	84	24%	85	24.4%	92	26.9%
Service	78	22%	80	22.9%	75	21.9%
Offices	73	21%	75	21.5%	67	19.6%
Food & Entertainment	55	16%	53	15.2%	52	15.2%
Vacant	27	8%	20	5.7%	21	6.1%
Residential	12	3%	12	3.4%	12	3.5%
Accommodation	9	3%	9	2.6%	8	2.3%
Convenience	8	2%	7	2.0%	6	1.8%
Trade / Retail	5	1%	4	1.1%	4	1.2%
Demolished	3	1%	3	0.9%	4	1.2%
Industrial	0	0%	1	0.3%	1	0.3%
TOTAL	354	100%	349	100.0%	342	100.0%

Table 1. Number and percentage of units composed within the Blenheim CBD from 2019 – 2023/24

By comparing data from the 2023/24 survey against previous years it is clear that there is changes and trends emerging. Comparison businesses continue to follow a constant downward trend in terms of CBD occupancy with 2018 accounting for 26.9%, in comparison to 2023's 24%. COVID-19 increased the influence of online shopping and although restrictions have lifted these habitual purchasing patterns likely continue to play a part in the demands of consumers – rendering comparison shops less essential.

There has also been a shift in the number of vacancies within the CBD. The 2023/24 survey exhibits an increase in vacancies of 2.3% since 2022 (going from 20 to 27). This is an outlier in the data as previously vacancies had been decreasing. It is important to note that the composition surveying was undertaken in December 2023, and therefore by the time this report is finalised some sites are likely to have been filled and vacancy numbers are likely to have changed again.

Food and entertainment, service, trade/retail, convenience, demolished, inner CBD accommodation, and residential category numbers all remain relatively consistent with previous checks with not more than 3% fluctuation in range over the last 3 checks spanning 4-5 years.

Transport Facilities

Parking

There are a range of CBD parking options available for usage including public carparks, street parking, and customer carparks. The 'Pay-by-Plate' scheme was introduced in 2019 for metered parking and remains an option for users.The previous survey undertaken in 2022 saw 89% regularly drive into the CBD. This year's survey found that 85% of visitors drive to the CBD with metered street parking identified as the most popular option (32%), followed by free limited time street parking (31%).

The 2023 Blenheim Parking Study found there was a total of 527 off-street parks (excluding disabled parking) for visitors to use and an average number of occupied parks sitting at 293. From these results, the volume of parks available throughout the Blenheim CBD should fit the demand of users. However, responses to the survey saw pedestrians with an increased desire for convenient street side parking even at a cost - given the popularity of metered parking options. The Wynen St carpark may also become a popular option for users of the new library due to its large capacity, proximity, and therefore convenience.

Cycle Facilities

There are 6 cycling paths present within Blenheim's CBD including 2 on-road cycle lanes and 4 cycling/walking paths. Respondents to the pedestrian survey showed 3% cycle to the CBD which suggests the facilities currently available fulfil the needs of the public. There are 26 bike stands available and evenly distributed around the town's centre. This number has increased in line with the development of the new library anticipating the need for further infrastructure in this area.

Generally, the Blenheim CBD provides sufficient facilities comparative to cyclist demand.

Public Transport

The Blenheim Bus is one of the public transport facilities available and operates Monday to Friday, 9am-3pm, and Saturday 9am-1pm, excluding public holidays. There is also a subsidised bus service provided through the Marlborough District Council. The fares for this service are $2 for adults, $1 for school children, and free for SuperGold cardholders/children under 5 respectively. The northern route follows Springlands – Riversdale with 20 stops and starting from central Blenheim on Seymour Street. There are 22 stops on the south route covering Witherlea – Redwoodtown also starting in central Blenheim. This allows for coverage of the majority of Blenheim and stops in a radius realistically distanced to cover most of the extended residential areas not included in the bus routes.

The Marlborough Taxi service is an alternative transport option available with two stands on Market Street north (by Farmers) and Seymour Street at the intersection of Seymour Street and Maxwell Road. Blenheim Cabs are another new taxi service option available for the public to use.

Pedestrian Route Quality

Purpose

This section of the Town Centre Health Check aims to understand whether high usage pedestrian routes were of a desired standard. Information gathered gives insight into the favourability of particular routes and whether there are some requiring improvement.

Method

The criteria carried out for determining the quality of pedestrian routes was the same as previous checks, with high usage routes being rated good, average, or poor with several variables being accounted for. The definition of each rating is as follows:

Good Walking Route	Average Walking Route	Poor Walking Route
• Good visibility • Wide footpaths • The footpath is a different material to the road, high quality • Lots of lighting • Adequate seating • Canopies • Zebra crossing • Signalised pedestrian crossing	• Pedestrian refuge • Thin footpaths for one person • Potholes • Pollution • Not much lighting • Some difficulties with pram • Unclear boundaries of footpath • Poor pedestrian safety	• Poor pedestrian safety • Not accessible/workable with a pram • No footpath • High speed traffic on the road next to the footpath • Parking intruding onto the footpath • Lack of lighting • No seating • Dirty

Findings

Overall, the quality of popular pedestrian routes throughout the Blenheim CBD, in comparison with previous health checks, have remained the same (Appendix E). Routes that continue to be given a “good” rating are distinguished by their wide, high-quality footpaths, vibrant lighting, and zebra crossings present. These include central Market Street, the forum between Market Street and Queen Street, Leeds Quay, Seymour Square, route by Clubs of Marlborough, Kinross Street, and main zebra crossing on Maxwell Road. The back-alleys that are still being used such as behind Kiwibank, behind Fairweather’s, and behind Work & Income New Zealand, are still given poor ratings due to their negative appeal, being narrow and dark routes. Similarly the of zebra crossings at the intersection of Maxwell Road and Seymour Street, and the intersection of Redwood Street and Main Street scored poorly. These crossings are located at round-a-bout exits on main roads raising concerns for pedestrians as vehicles are travelling at varying speeds at such cluttered locations.

Two new popular routes have been observed in accordance with the greater traffic created by the new library along Wynen Street and High Street. Both routes received a ‘good’ rating due to their recent redevelopment and were added to the survey in order measure how this quality is maintained.

As noted in the previous survey it may be worth further acknowledging the overall quality of pedestrian routes within the entirety of the Blenheim CBD. By observing every route within the CBD as opposed to routes deemed of “high usage” it may allow for a more comprehensive overall picture of the quality of routes within the CBD rather than the back-alley shortcuts used by locals becoming disproportionate negative outliers.

State of the Environment

Purpose

By measuring the environmental state of the Blenheim CBD it furthers understanding around its quality and allows for conclusions and comparisons to be drawn about how this has changed. As the survey is undertaken at various points around the CBD it also gives an indication around the overall quality of the town centre.

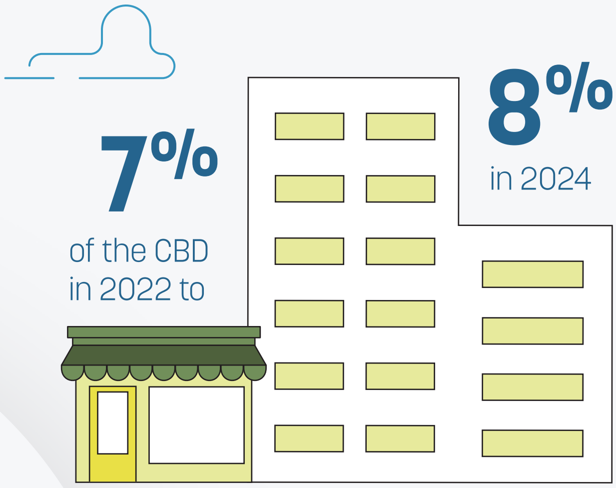
Method

The state of the environment was undertaken similarly to measures used in previous health checks to ensure the information gathered was accurate and provided sufficient comparisons. The state of the environment was carried out against the following criteria:

- Quality of air
- Adequate seating
- Footpath conditions

key stats

Vacancies **increased** from



7%

of the CBD in 2022 to

8%

in 2024

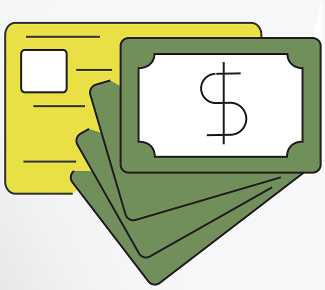
Most people visit the CBD for **cafes/restaurants**

64%

The **total** spend in Blenheim CBD was

$296.8M

from Dec 22 – Nov 23



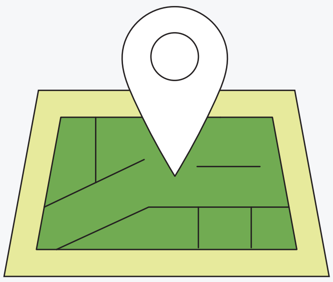
Blenheim CBD now only contributes only

48%

of the total spend for Blenheim as opposed to

52%

in 2021



State of the Environment

Blenheim Town Centre
Average rankings

2 Air Quality

2 Noise Pollution

2 Clutter

2 Cleanliness

2 Visual Pollution

1 Adequate Seating

1 Adequate Shelter

1 Adequate Green Space

2 Pedestrian Safety

2 Directional Signage

2 Footpath Condition

2 Cycle Lanes

- Noise pollution
- Clutter
- Cleanliness
- Visual pollution
- Adequate shelter
- Adequate green space
- Pedestrian safety
- Directional signage
- Cycle lanes

A criteria for a score of 0,1 or 2 which corresponded to bad, average, or good environmental conditions respectively, was used to rank each location. All were averaged and rounded via Excel to produce ratings ranging from 0 (bad), 1 (average), or 2 (good). Surveying happened twice on the following dates and times: 21/11/23 at 2pm, and 23/11/23 at 11am in order for there to be consistency in the ratings and results and to remain unaffected by external factors like time of day and weather conditions.

It is important to consider that this data was gathered by perspective, on the two days that state of the environment was measured. It should also be noted that this is not a scientific report. The Marlborough District Council environmental team carry out scientific testing of the air quality, however, this report is completed by human judgement and objective observation on the day measures took place.

Findings

The general conclusion when comparing current and previous Blenheim CBD Health Check findings is that the state of environment has primarily stayed the same which is promising for the Blenheim CBD environment. As noted in previous surveys, only four locations provided cycle lane transport options (the intersection of Leith Terrace and Russel Terrace, the intersection of Arthur Street and Seymour Street, George Street, and the intersection of Maxwell Road and Seymour Street). This provides one example in which there is room for improvement at the surveyed sites.It is also worth noting that the location on Redwood Street approaching the roundabout, although remaining at an average rating, was at risk of moving to ‘poor’ site quality primarily due to noise pollution, cleanliness, and pedestrian safety factors.

Alternatively, sites such as Queen Street (Liz Davidson Place), the Riverbank area on Symons Street, and the Forum at Market Place all retained their ‘excellently maintained’ status. This adds weight to the argument identified in previous health checks, that there should potentially be a higher standard of ‘great’ site quality introduced to the survey. This would allow for a better distinction and system of categorisation between well-maintained and excellently-maintained locations

Street Vitality

Purpose

Measuring street vitality allows for analysis on the attractiveness, activity, and general appeal of the town centre as a whole. This is important as it gives insight into pedestrian behaviour and interaction with the CBD.

Method

Gathering this information was undertaken following the same method from previous health checks via a walking survey around the Blenheim CBD. Building fronts were ranked from very weak, weak, moderate, to strong which was determined by analysing the activeness and aesthetic appeal of the street edges. The definition of each grading point is as follows:

- **Strong:** Most active e.g., cafes with tables along the street, retail with large doors, and shops with large windows that could be seen through.
- **Moderate:** Recreational areas or shops that had windows with obstructions e.g., a bank or post office with flyers in windows, or smaller windows
- **Weak:** Inactive e.g., petrol stations, shops with some blank walls, accommodation or residential space that had some presence on the street.
- **Very Weak**: Very inactive, where no activity can be seen or there is no presence on the street e.g., vacant shops, blank walls.

Findings

When comparing overall quality of CBD building fronts to previous survey results it is relatively similar. Higher rated storefronts generally possessed outdoor seating areas and open-plan fronts with large glass windows. Central CBD streets including Scott Street, Market Street, and Maxwell Road continued to maintain the highest levels of vitality, owing to the large quantity of cafes/restaurants and high-end retail shops. The trend that ‘weak’ and ‘very-weak’ ratings increased in frequency the further from the central CBD generally continued. Demolished and vacant buildings also corresponded to weaker levels of vitality. Generally, many building fronts showed potential, however, smaller sized windows due to smaller buildings contributed to the street edges falling in the “very weak” category.

Previous surveys highlighted Queen Street as a lower vitality area owing partially to its numerous vacant storefronts and dominant presence of the Blenheim Health Hub, receiving ‘weak’ ratings due to its dark, blurred out windows along the face of the street. Vacancies have decreased since last survey, and although there is still room for improvement, its general vitality has increased.

Another area with dramatic increase of vitality is the development of the new library. Its expansive street-front windows, engaging architecture, and prevalence of outdoor seating available have all greatly increased the vitality of this large area of CBD street-front.

The street vitality section of the health check serves to measure the attractiveness of the town and it's effect on pedestrian behaviour. Therefore, it is worth considering how Blenheim's evolving streetscape adds to the vitality of the CBD. The Marlborough Mile is one example with six sculptures/installations placed along Market Place, Riverside Park, Adams Place, Stadium 2000, Bythells Place, and Liz Davidson Place. The Chorus Box scheme's painted electrical cabinets, alongside the increasing number of murals like those on 59 High Street and 1C Main Street also add to the vibrancy of the town centre. These artworks all contribute to the vitality of Blenheim's CBD in their engagement of pedestrians which raises the question of if, and how, these features of the town be captured in future surveys.

Pedestrian Survey

Purpose

The pedestrian survey provides insight into how the Blenheim CBD is received by gathering a collective public view on its strengths and weaknesses. It is a chance to identify any issues, or alternatively improvements, that are relevant. This surveys aim is to ensure Blenheim provides residents and visitors with adequate services.

Method

The pedestrian survey was made available to the public in both physical and online forms with distribution channels through the MDC website, social media, newspaper, and face-to-face surveying in the CBD. Overall, 381 respondents answered the survey, 297 of which were on the Blenheim CBD. In comparison, previous checks received 150, 135, 90, 286, and 484 responses in 2014, 2016, 2018, 2020, and 2022 respectively.

Findings

Composition of Blenheim Pedestrian Survey

The survey saw that respondents were primarily from Redwoodtown making up 22%, followed by Blenheim Central (14%), Witherlea (13%), and Springlands (10%). Comparatively the 2022 survey saw highest respondent rates from Blenheim Central, followed by Springlands, Redwoodtown, and Witherlea.

Reasons for Visiting Blenheim CBD

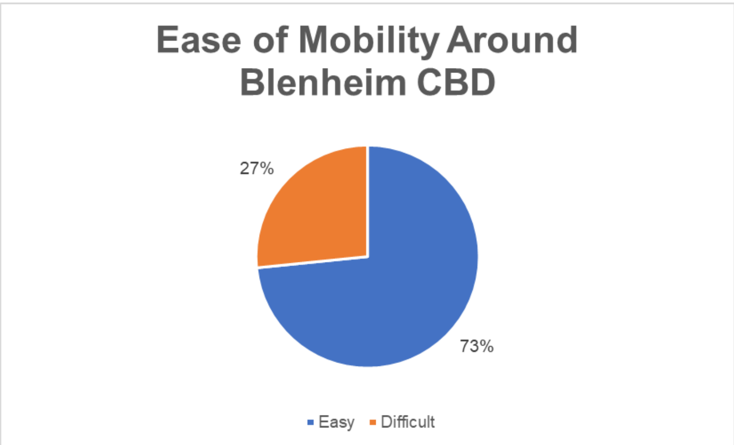
Respondents were asked to identify their 3 most common reasons for visiting the CBD. 64% said that visiting a café/restaurant was a main reason with non-food shopping a close second at 63%. These reasons are consistent with the results of the 2022 survey, but differ from the 2020 survey which identified non-food shopping as the most popular reason for visiting. Since 2020 retail stores (categorised as comparison) have moved from 92-84 units of the CBD while food/entertainment increased from 52-55 units. Although this appears to be a gradual trend, it does give an indication of consumer behaviour and what is relevant to pedestrians using the CBD.

Entertainment/leisure remains the least popular reason for visiting Blenheim's CBD with only 19% of respondents identifying it as one of their 3 most common reasons for visiting the CBD

Travelling to Blenheim CBD

The most popular method of transport to the Blenheim CBD remains driving, making up 85% of respondents. Blenheim's low traffic levels, and the comparative ease of access provided by driving are likely to explain why this number is so high. This figure is an outlier as the last surveys a trend has been observed with the percentage of people entering the CBD via car has increasing going from 75% in 2018, to 84% in 2020, to 89% in 2022. This 4% reduction in drivers may be a marker of a new trend emerging. Walking from home is the second most popular way of travelling to the CBD making up 8% of respondents.

Metered street-parking was identified as the most popular option for visitors (32%) with free, limited time street parking as a close second (31%). The 2022 survey showed free street parking with a limited time was the most popular option (29%) for CBD visitors, followed by public carparks at 18%. This demonstrates the increasing desire for CBD users to park streetside even with additional cost. This may also be due to the convenience of the online pay-by-plate scheme which makes it easy to manage metered parking.



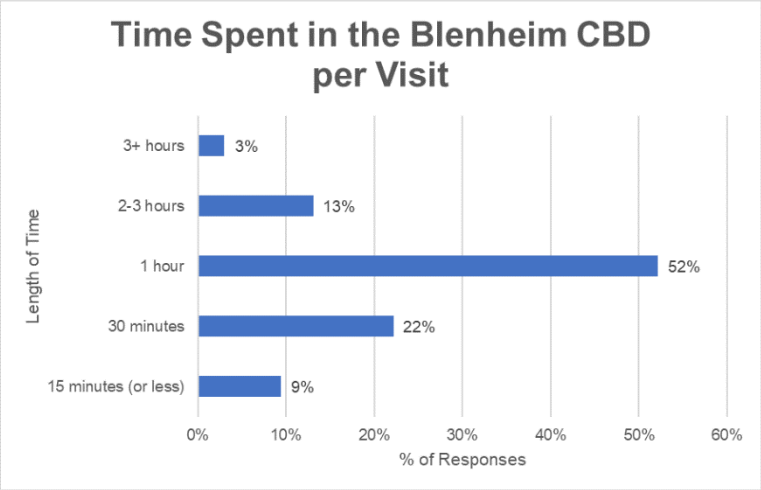
Ease of Access

73% of respondents found that Blenheim's CBD was easy to access specifically due to its relatively compact layout. Those that had difficulty in accessing the town centre (27%) took issue with the footpath conditions, street width and congestion, and speed bumps. There has also been a 6% increase in those having difficulty accessing the town centre with a comparative 21% of respondents in the 2022 health check.

Attractive and Unattractive Aspects

This survey question was left open-ended in order to gain unbiased answers in the format established by previous health checks. Attractive aspects of the CBD were frequently highlighted as Seymour Square, green spaces/planted areas, The Forum, and art installations like the Marlborough Mile and murals. The new library and The Quays (riverside area) specifically were focus point for a large number of responses appreciating their development. Bythell Place and Market Street also gained a few mentions.

Less attractive aspects of the CBD included the number of vacancies, brick footpaths, quality/upkeep of public toilets, and the faded blue lamp-posts.



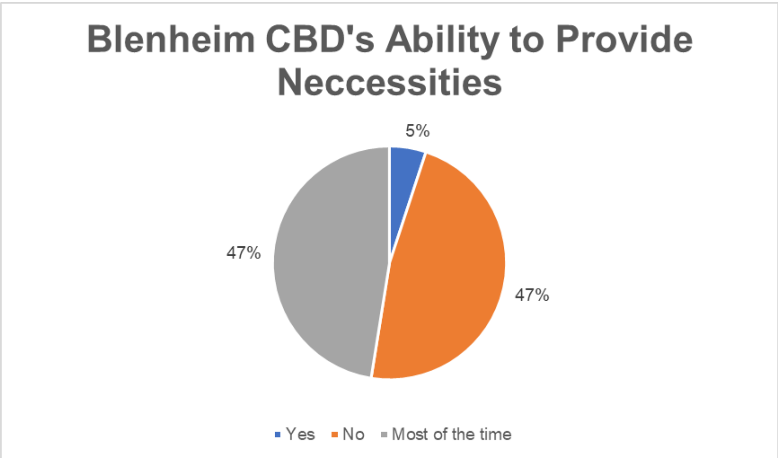
Time Spent in the CBD

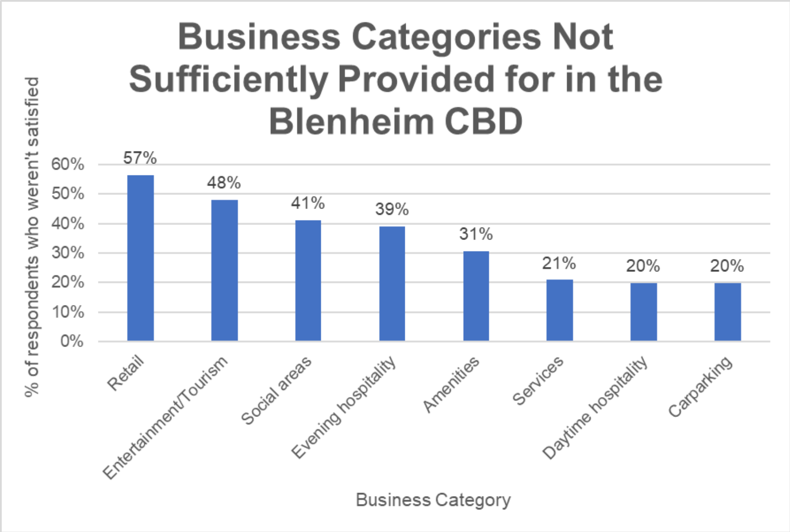
Most pedestrians surveyed spent roughly 1 hour in the CBD (52%) which is consistent with the last 3 health checks (52% in 2018, 48% in 2020, and 45% in 2022). The combined proportion of pedestrians who spent 30 minutes or less within the CBD sits at 31% which is comparative with 2022 (35%), and 2020 (29%), but significantly greater than 2018 (13%). As highlighted in the previous check this suggests people are visiting the CBD to do what they must and then immediately leaving again

Frequency of Visiting the CBD

63% of respondents said they visit the CBD on a weekly basis, with 27% visiting monthly, 8% weekly, and 2% yearly. This exhibits the trend identified in previous checks that frequency of visits are decreasing. In 2020, 67% of respondents would visit weekly, which decreased to 64% in 2022. These are not being replaced by more frequent visits as daily visits have also decreased from a consistent 12% in 2020, and 2022 to only 8%. This trend emerging could be, in part, due to the convenience of online shopping alternatives replacing the need for the such frequent visitation to the town centre.

Blenheim CBDs Ability to Provide What is Needed



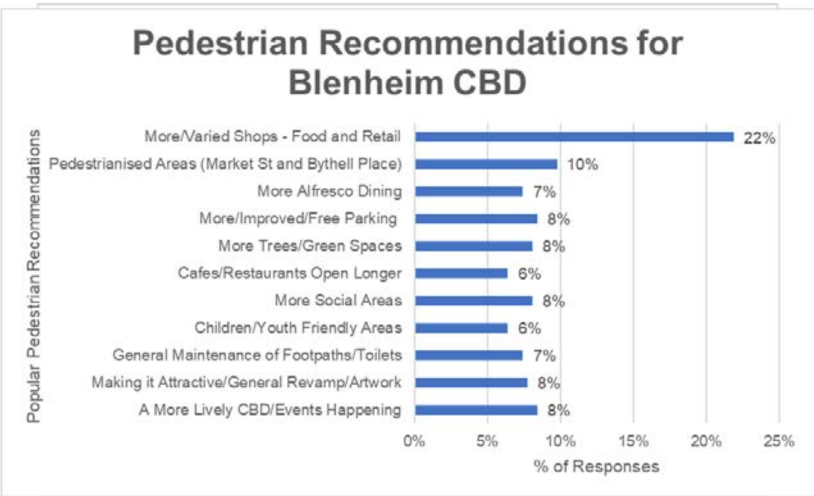


As the CBD is frequently changing it is important to gain public insight into it's ability to provide necessities. This aspect of the survey found that 52% of respondents thought the CBD either does (5%), or is mostly able to (47%) provide necessities. That being said, 47% respondents were unhappy with the CBD's ability to provide. People generally appeared to be happy with carparking, daytime hospitality, and services. However, 57% of (297) total responses said retail options were lacking, and entertainment/tourism options (48%) and social areas (41%) were also identified as underprovided for. These results are similar to the 2022 Health Check but in 2020 entertainment/tourism was the only evidently problematic category for pedestrians. This suggests that social areas and retail categories have gotten worse over the last 2 surveys.

Improvements

58% of the respondents when asked if the Blenheim CBD had improved over the last 2 years said 'No'. However, it is important to note that this question does not ask for justification of answers, nor was there a neutral option provided which could potentially have increased 'No' responses. There is also improvement from last survey results as only 26% of respondents agreed the CBD had improved in 2022 while 73% said it hadn't.

Recommendations



This question was left open-ended, providing insight into what pedestrians wanted to see more of in the CBD. (figure ?) as a summary of these results, demonstrates the most frequent responses but does not include those mentioned only a few times. The primary recommendation with 22% of responses was a need for more food and retail businesses and with greater variety of offerings. Pedestrianised areas, particularly along Market St and Bythell Place was also another popular suggestion for improvement, with 10% of responses. Other frequently occurring responses were more/improved parking, more trees and green spaces, better social areas, a more lively CBD with events happening, and a general revamp including more artwork.

The desire for more retail options is in line with the current trend of decreased 'comparison' business types within the CBD. Similarly to comments made in the 2022 survey, there is some public concern over the development of Westwood and its potential to further impact this trend in the future.

Blenheim CBD Spending

Purpose

This segment of the Health Check is based on data provided through an online subscription with Market View which means the Marlborough District Council is able to view and analyse every card (eftpos and credit) transaction in the Marlborough region. It provides an overview of card transactions including where they take place, city/country of origin, and how much was spent. This section of the survey was introduced in 2022 but has data available from January 2016. This means analysis and comparisons can be drawn around transaction rates and the financial state of Blenheim's CBD. This software only accounts for card transactions so it must be noted this is not an entire representation of cashflows in Marlborough. It is also important to note that the parameters of the Blenheim CBD do not entirely align with its parameters on Market View, but they do cover much of the reports area.

Findings

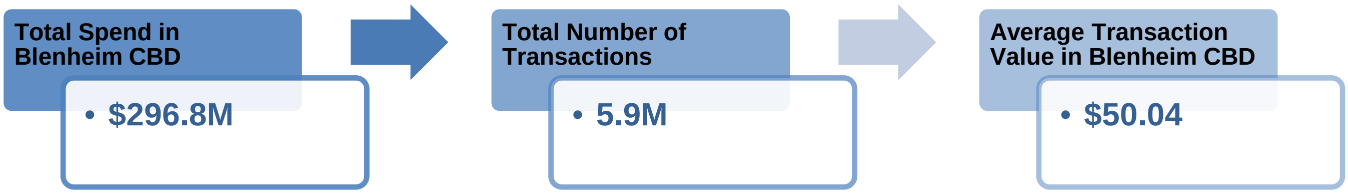
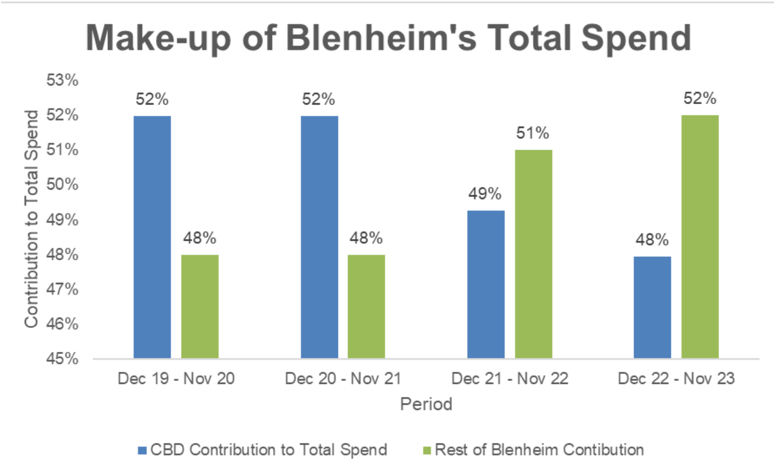
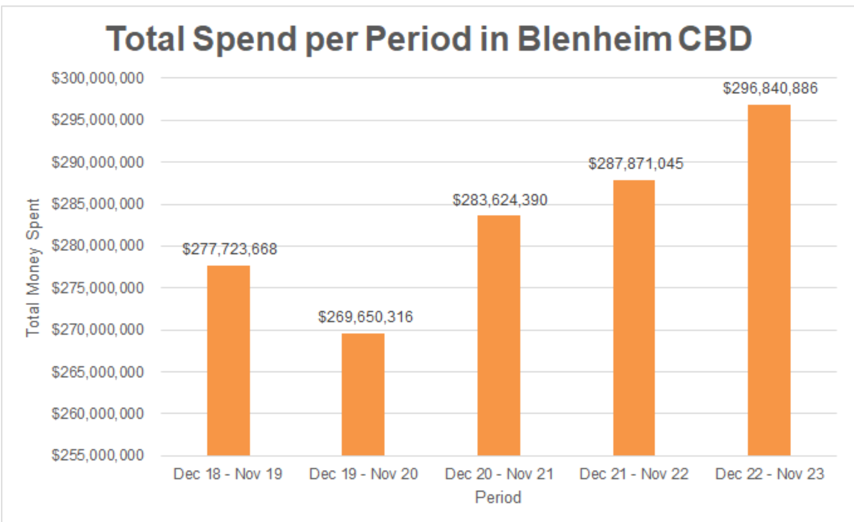


Figure 3. Overview of period Dec 22 – Nov 23.

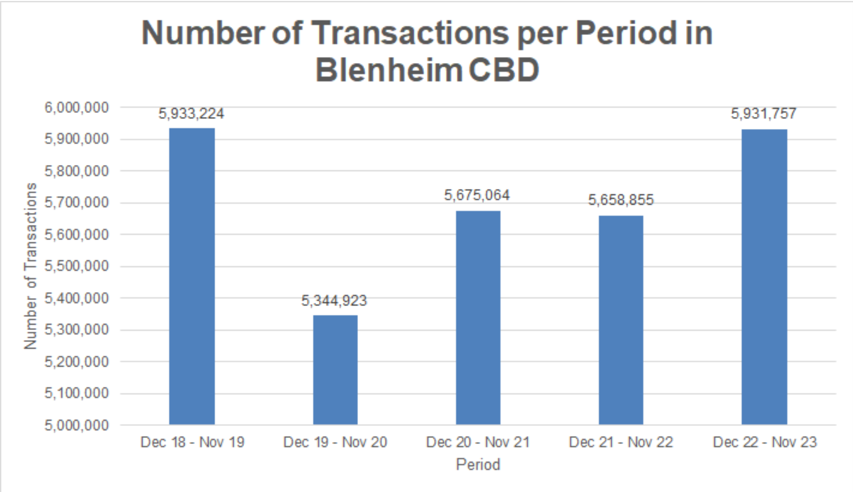
During the measured December 2022 – November 2023 period Blenheim CBD saw an overall spend of $296,840,886 with 5,931,757 transactions, averaging $50.04 per transaction. Comparatively the overall spend between the December 2021 – November 2022 was $287,871,045 over 5,658,855 transactions at an average of $50.87. Although there is a definitive increase in the total spend, the effects of inflation are an important consideration in these figures.



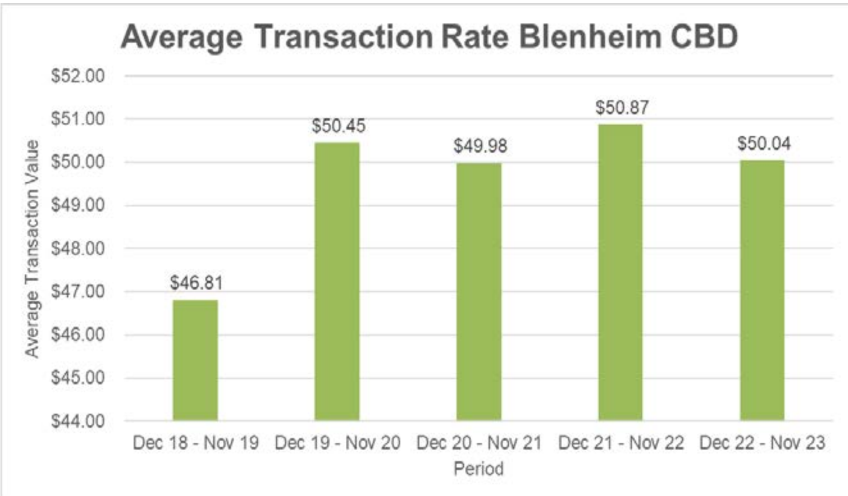
The entirety of Blenheim, including both CBD and surrounding areas, total spend for December 2022 – November 2023 was $619.2M with 11,395,321 transactions taking place. This means that the Blenheim CBD accounts for 48% of Blenheim's total spend. This is to be expected as the Blenheim CBD accounts for a large majority of the shops available for Blenheim residents. In the December 2021 – November 2022 period Blenheim CBD made up 49% of the total spend, while from December 2020 – November 2021, and between December 2019 – November 2020, 52% of the total spend was contributed by the CBD. Although these are marginal decreases it is important as it highlights a trend in the CBD's contribution to overall spend for Blenheim.



When analysing the total spend figures, the December 2022 – November 2023 period shows the highest rates of spending by card transaction. This affirms a positive trend of spend increasing within the Blenheim CBD over the last few years. The December 2019 – November 2020 period is an obvious outlier with the effects of COVID-19 on spending evident. However, it is important to note that although spending appears to be increasing the effects of inflation are an important consideration when analysing this data.



This is reinforced when we consider the number of transactions. December 2022 - November 2023 showed the second – highest rates of transactions other than the December 2018 – November 2019 period. However, the total spend for 2022-23 was much higher than that of 2018-19. This means that although similar numbers of transactions took place, the number of higher value transactions in 2022-23 must be greater. The 2019-20 period again exhibits the effects of COVID-19 with around 300,000 less transactions than any other year. The 2020-21 period marks a return to more regular rates of transactions and 2022-23 shows numbers similar to pre-covid.



By understanding average spend rates it provides information around resident tendencies. The average transaction rate in the December 2021 – November 2022 period is shown to be the greatest at $50.87, with December 2019 – November 2020 second at $50.45. However, all rates within the last four measured periods remain within $1.00 fluctuation with no noticeable spikes. December 2018 – November 2019 is the only period with a considerably lower average spend at $46.81.

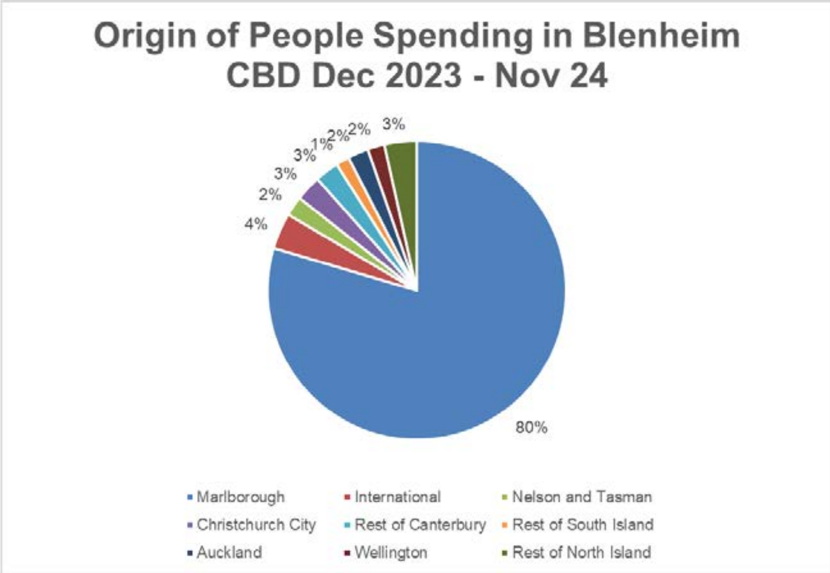


Figure 4. Pie Graph showing the origin of people who spend in the Blenheim CBD

As evident from Figure 4 the proportion of Blenheim CBD spend contributed by people from Marlborough is by far the most significant at 80%. This is to be expected as the nature of the CBD is to provide primarily for residents and as a convenient shopping location for smaller surrounding townships such as Renwick. The second biggest contributor was identified as international spenders at 4%, with all other regions contributing between 3-1% of total spend. It is also important to note that Blenheim residents who have their cards connected to out-of-town banks have their origin classed as these respective areas and may skew data slightly.

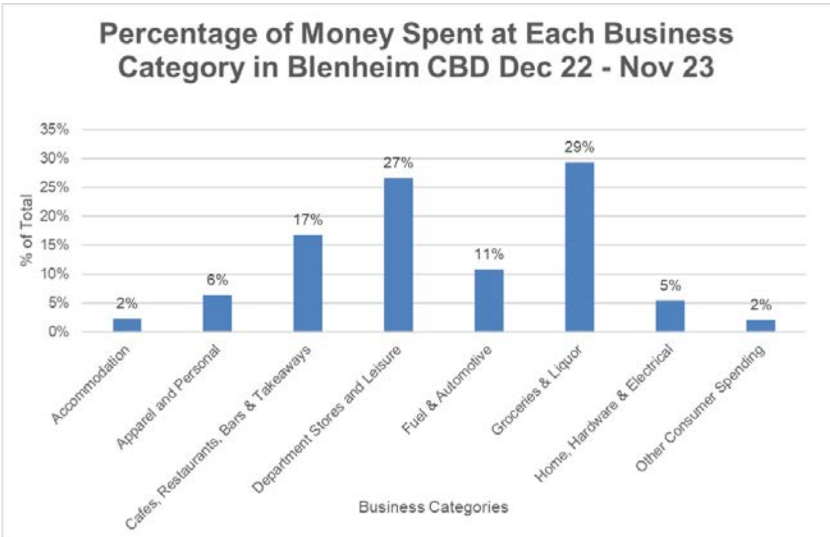


Figure 5. Graph showing the distribution of money per business category in the Blenheim CBD.

'Other consumer spending' can be defined as public transport, sport & recreational hubs, amusement & gambling activities/operations, and performing arts operations.

It is clear through Figure 5 the importance of Groceries and Liquor, and Department Stores and Leisure, business types as they account for a combined 56% of the CBD's total spend. $87,273,386 is spent at Groceries and Liquor business types while Department Stores and Leisure account for $79,212,568.). Cafes, Restaurants, Bars & Takeaways are also a significant contributor to total spend making up 17%. The Apparel and Personal category only makes up 6% of the total spend which is surprising considering how dominant the equivalent 'Comparison' CBD category is – making up 24% of the town centres composition. This suggests that e-commerce and online shopping are becoming more popular as a purchasing method for this category of businesses.

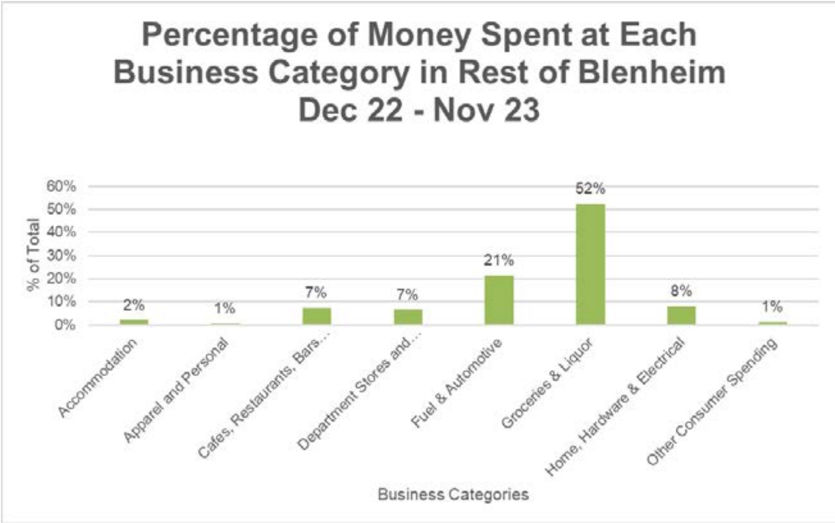


Figure 6. Graph showing the distribution of money per business category in the 'Rest of Blenheim'.

The 'rest of blenheim' primarily appears to generate revenue through groceries and liquor sales at 52% of this total spend. This is to be expected as Pak'n'Save, Countdown Redwoodtown, and Countdown Springlands are all located outside of the surveyed CBD area – instead located for convenience of residents in these regions. 'Department stores & leisure' and 'cafes, restaurants, bars, and takeaways' categories are not as dominant in their contribution to total spend as in the CBD as these business categories are primarily located in the town centre. 'Fuel & automotive' category increases in the 'rest of Blenheim' at 21% of total spend. This again is expected as there are only 2 petrol stations within the CBD area. The kind of transactions taking place at these locations are also likely to be frequent due to necessity and above average transaction value.

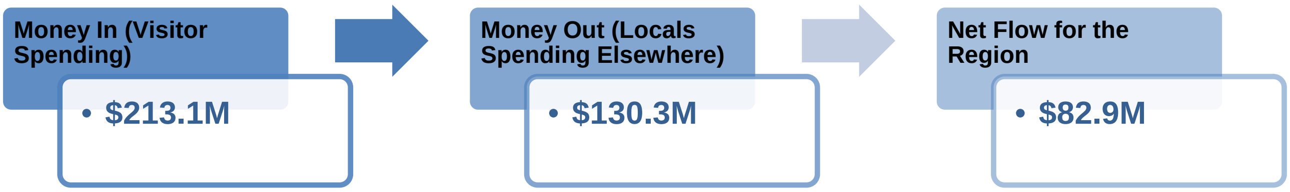


Figure 7. Marlborough District Cash Flows for Dec 22 – Nov 23.

As MarketView doesn't measure the spending flows for Blenheim CBD data specific to the town centre is unable to be generated, however it is relevant to look at the overall flows within the Marlborough Region. In the Dec 22 – Nov 23 period the net flow measured for the Marlborough District was a positive $82.9M, with money in increasing by 17.7M and money out decreasing by 1.6M from the last measured Dec 21 – Nov 22 period. This is a large increase in revenue for the region and has well surpassed the pre-COVID net flow spend.

Marlborough District Domestic Flows			
	Money In	Money Out	Net Flow
Dec 22 - Nov 23	$213.1M	$130.3M	$82.9M
Dec 21 - Nov 22	$195.4M	$131.9M	$63.6M
Dec 20 - Nov 21	$193.3M	$128.4M	$65.0M
Dec 19 - Nov 20	$173.4M	$102.7M	$70.7M
Dec 18 - Nov 19	$184.4M	$106.9M	$77.5M

Table 2. Table showing Marlborough District Domestic Flows from 2018 – 2023.

Although 'money in' continued to increase over the last 5 measured periods (with the exception of the COVID effected 2020) the 'money out' was the reason for fluctuation in the positive trend of increasing revenue. (Figure ?) also demonstrates how the last three measured periods have seen a large increase in money spent out of region. 2023's large influx of revenue spent in-region is likely due to the increased cruise ships and tourism able to be brought back to Picton as the first period measured unaffected by COVID restrictions.

Side by Side Comparisons

Market St 2009 vs 2024

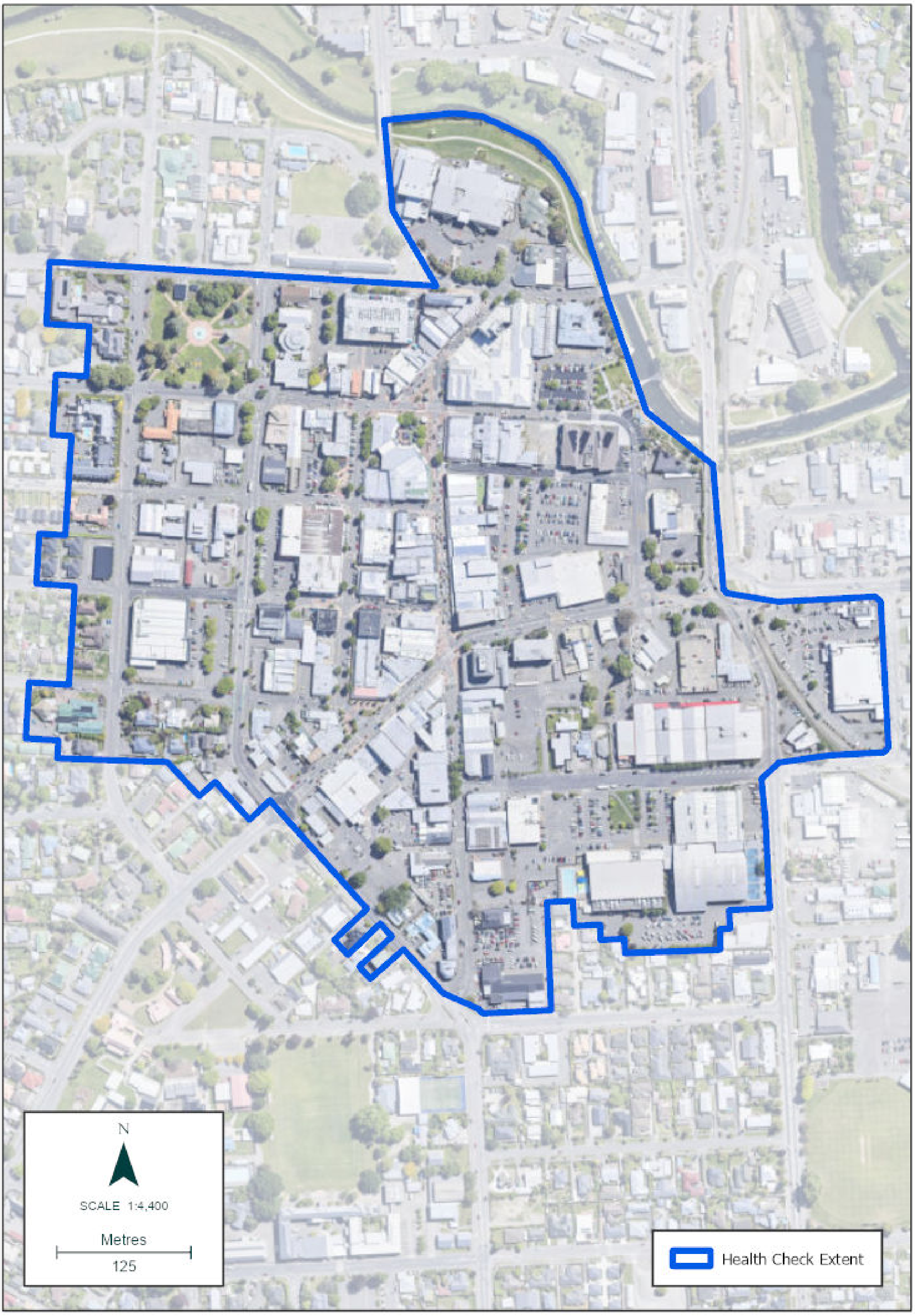
Wynen St 2009 vs 2024

Corner of High Street and Symons Street 2009 vs 2024

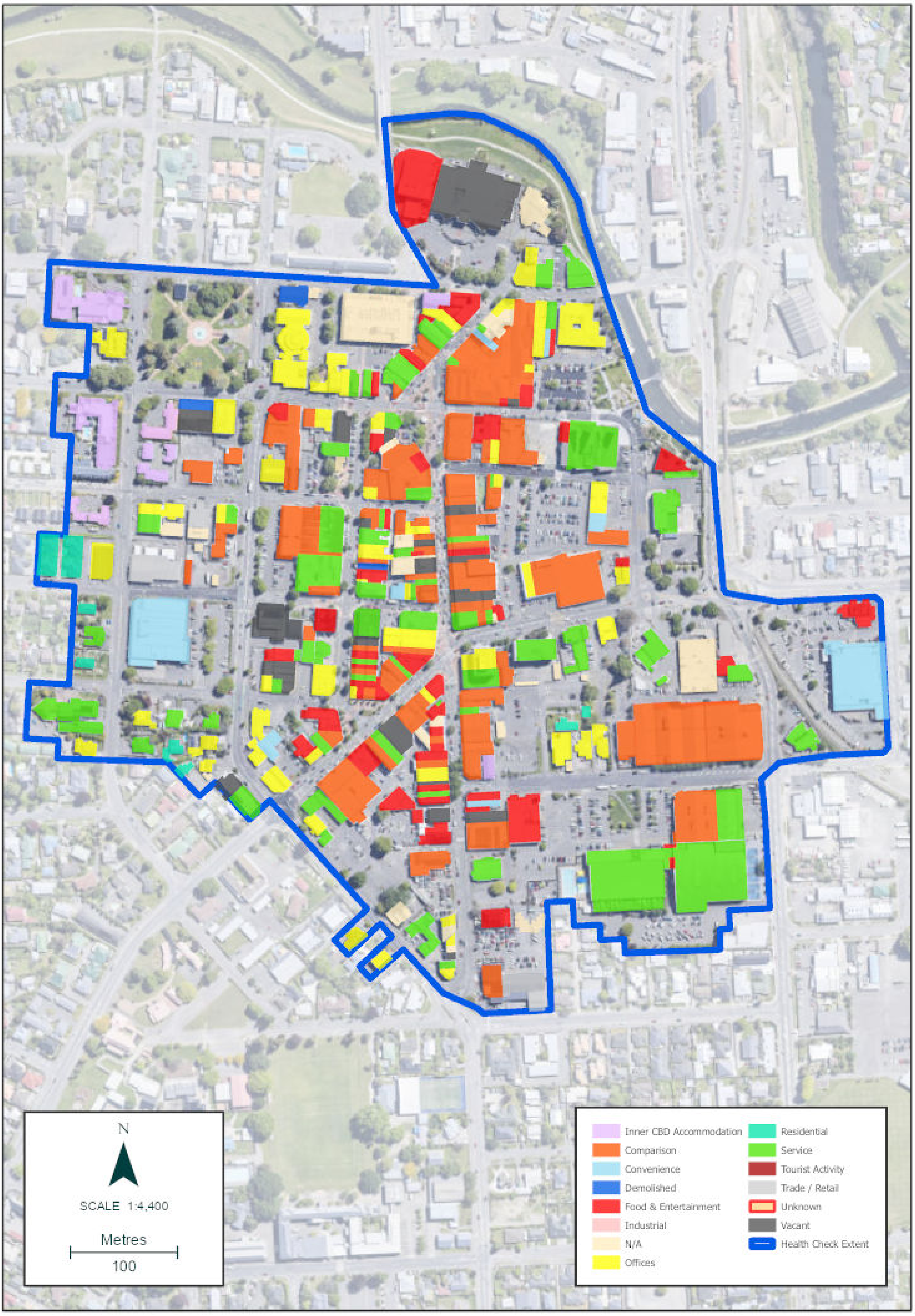
Main Street 2009 vs 2024

Appendices

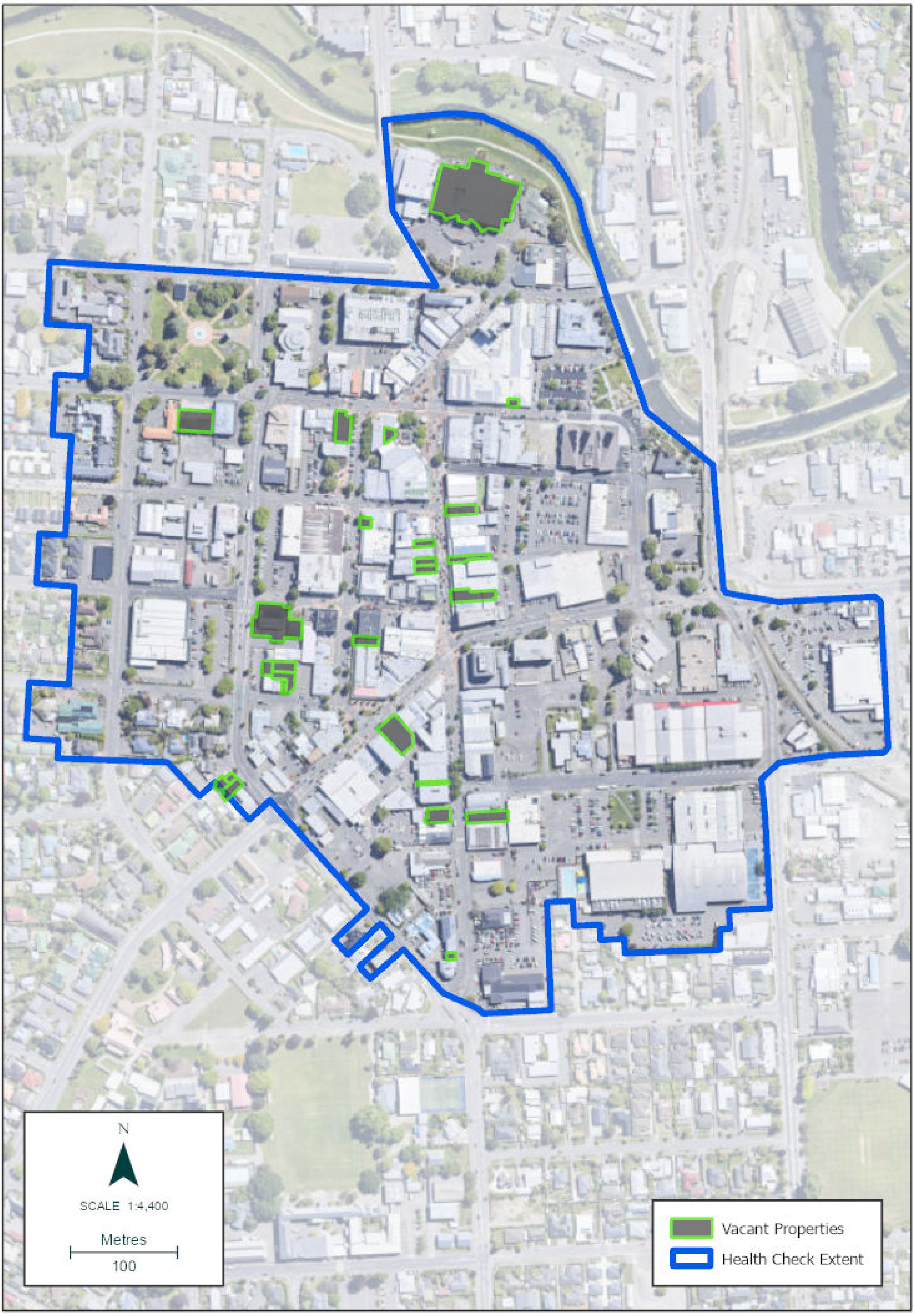
Appendix A: Blenheim CBD Map



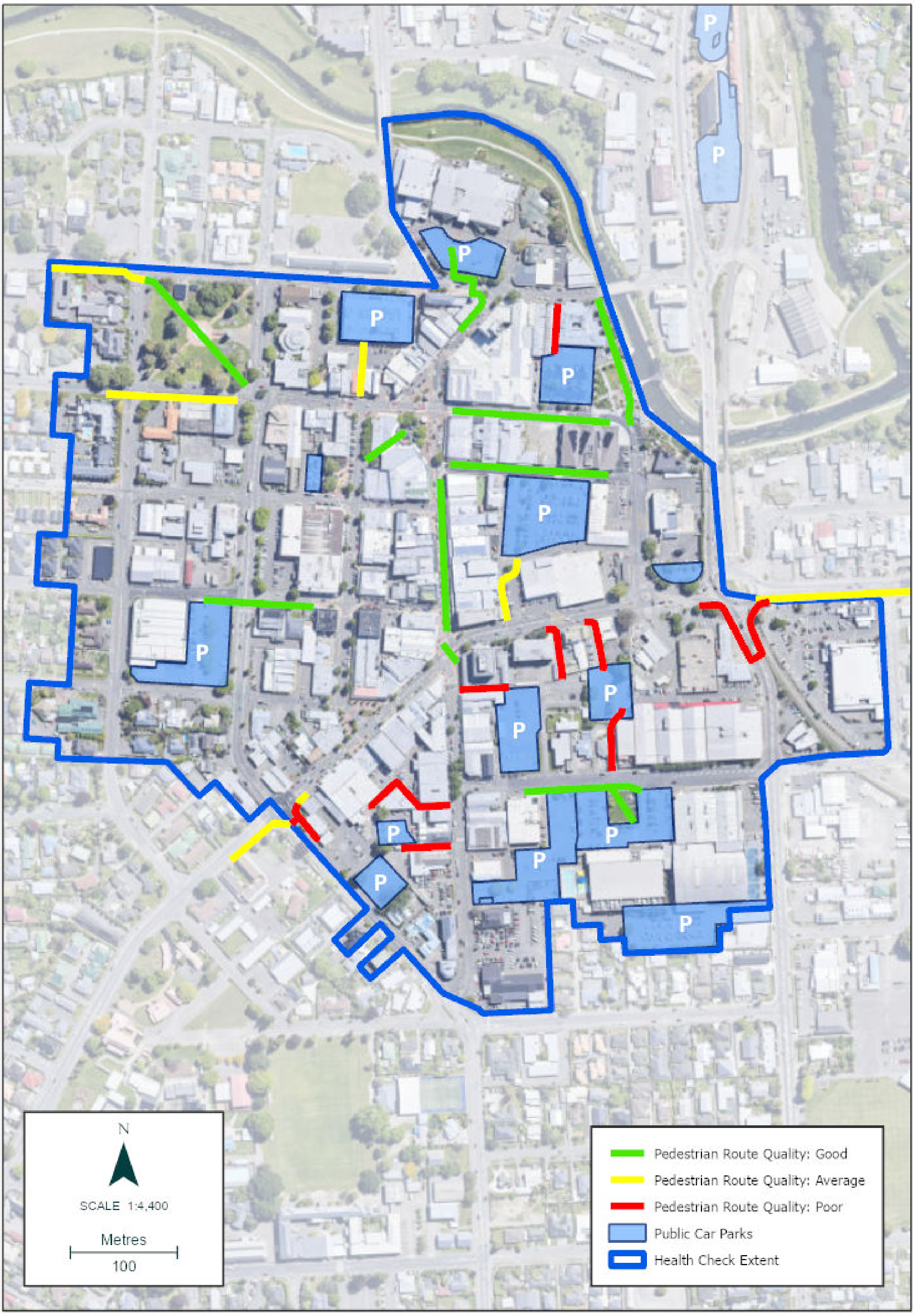
Appendix B: Blenheim CBD Composition Map



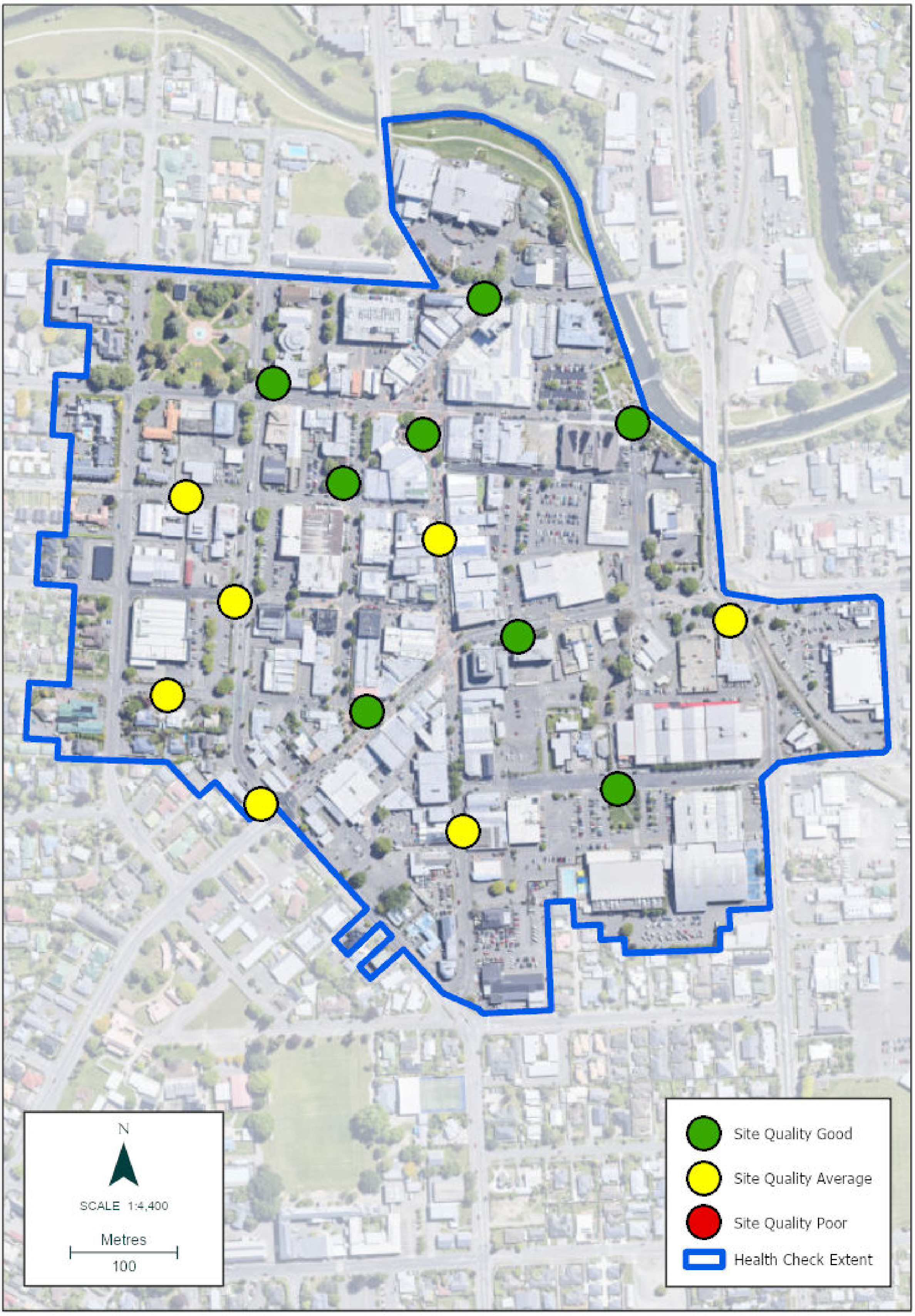
Appendix C: Blenheim CBD Vacant Properties Map



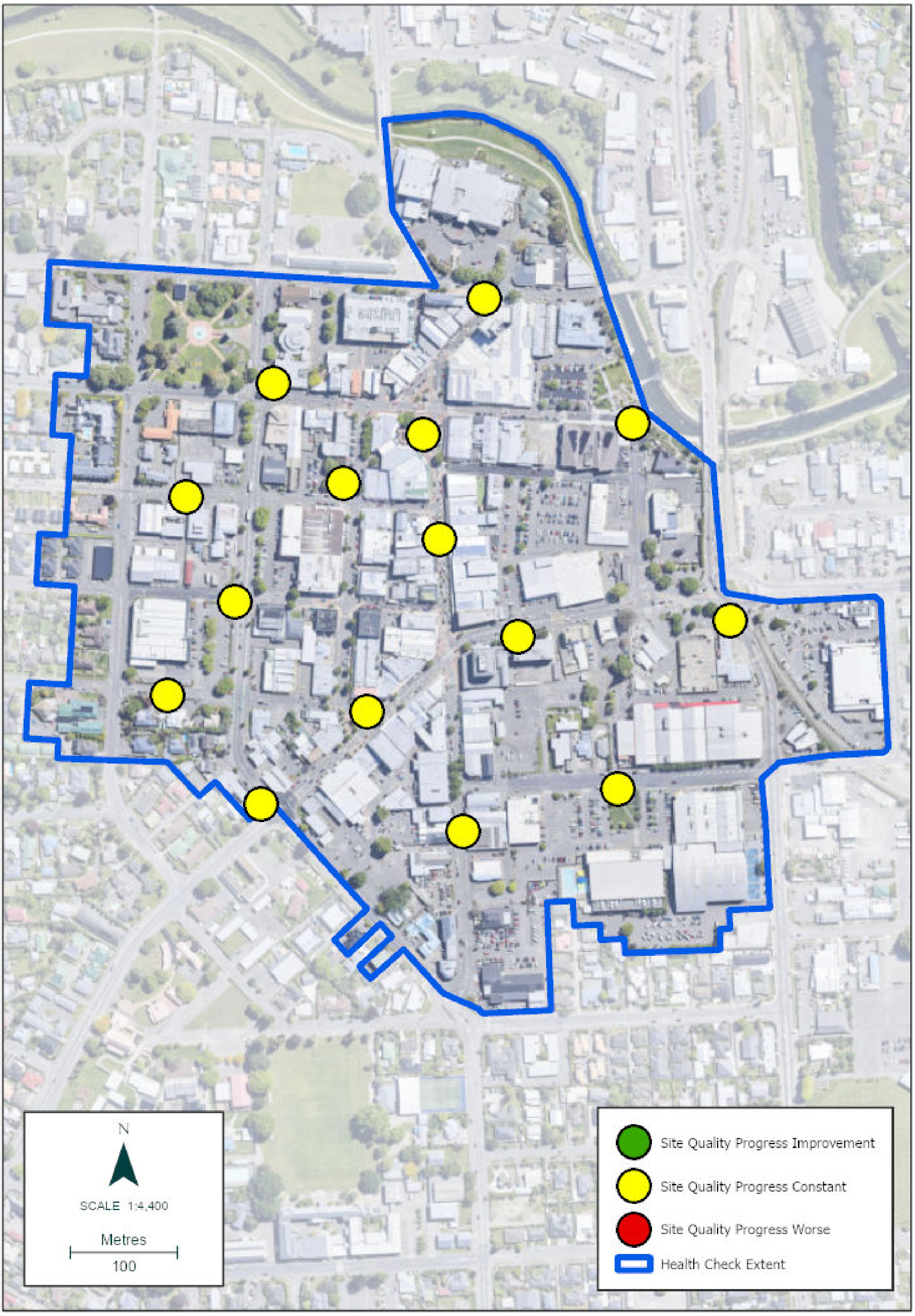
Appendix D: Blenheim CBD Pedestrian Route Map



Appendix E: Blenheim CBD State of Environment Map



Appendix F: Blenheim CBD State of Environment Progress Map

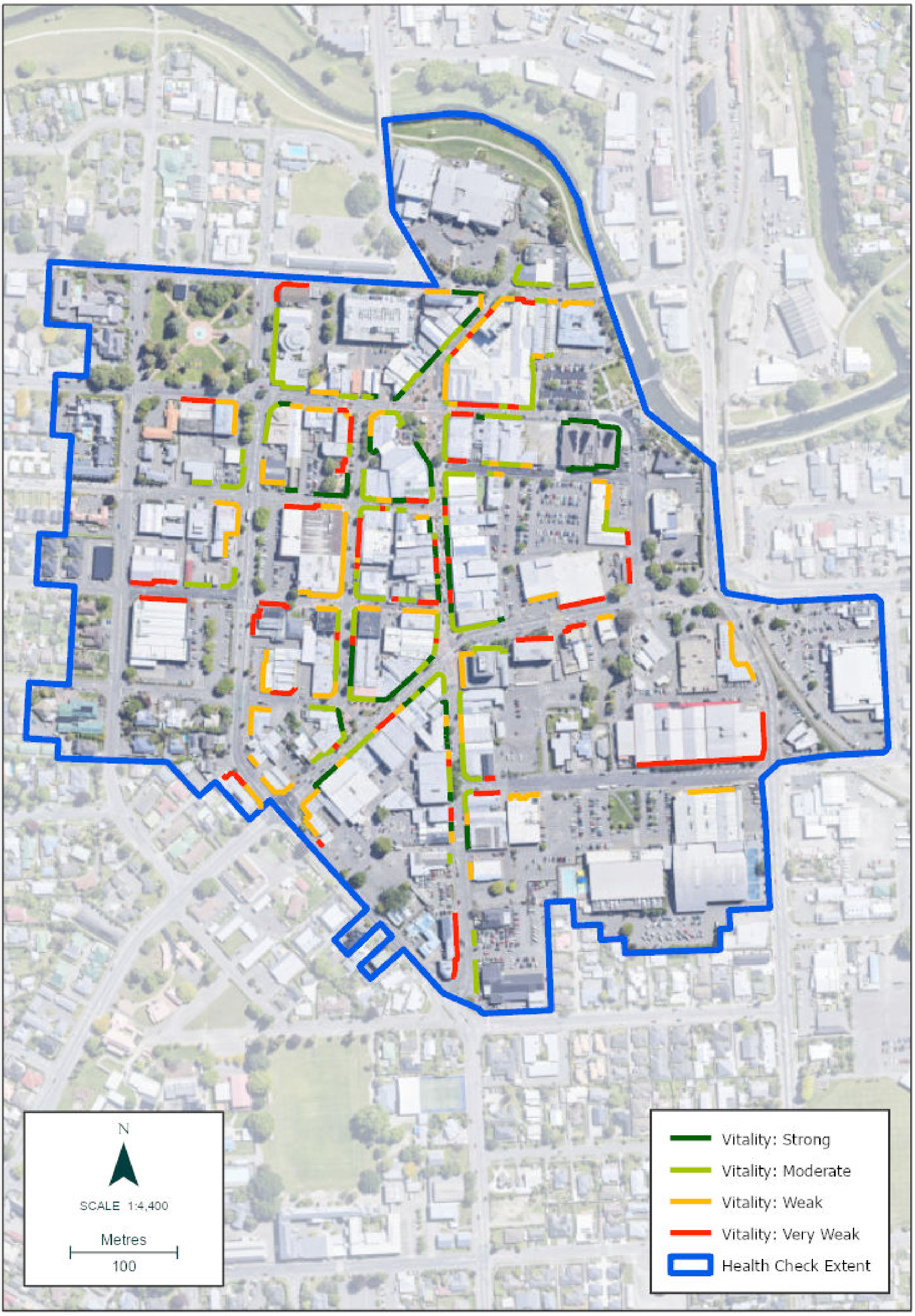


Appendix G: Blenheim CBD State of Environment Tables

21/11/23 2pm	Air Quality	Noise Pollution	Clutter	Cleanliness	Visual Pollution	Adequate Seating	Adequate Shelter	Adequate Green Space	Pedestrian Safety	Directional Signage	Footpath Condition	Cycle Lanes	Final Score 2023	Conclusion 2021	Conclusion 2019	Conclusion 2017	Conclusion 2015
Intersection of Leith Terrace and Russel Terrace	2	2	2	1	1	1	2	0	2	2	2	1	2	Good	Good	Good	Good
Intersection of Seymour Street and High Street	2	2	1	2	2	2	1	2	2	2	2	NONE	2	Good	Good	Good	Average
River bank area on Symons Street	2	1	2	2	2	2	1	2	2	2	2	NONE	2	Good	Good	Good	Good
Forum/Market Place	2	2	2	2	2	2	2	1	2	1	2	NONE	2	Good	Good	Bad	Bad
Queen Street, Liz Davidson Place	2	2	2	2	2	2	2	1	2	2	2	NONE	2	Good	Good	Good	Good
Charles Street	2	2	2	2	2	0	0	0	1	2	2	NONE	1	Average	Average	Average	Average
Market Street	2	1	1	1	1	2	2	0	2	1	2	NONE	1	Average	Good	Average	Average
Intersection of Arthur Street and Seymour Street	2	2	2	2	2	0	0	0	2	2	2	2	2	Good	Good	Good	Average
Intersection of Redwood and Main Street	1	0	0	1	1	0	0	0	1	2	1	NONE	1	Average	Average	Bad	Bad
Main Street	2	2	2	2	2	2	1	0	2	2	2	NONE	2	Good	Good	Average	Average
George Street	2	2	1	1	2	0	0	0	1	2	2	1	1	Average	Average	Average	Average
Intersection of Maxwell Road and High Street	2	2	2	2	2	2	1	1	2	2	2	NONE	2	Good	Good	Good	Good
Kinross Street	2	1	2	2	2	2	1	2	1	2	2	NONE	2	Good	Good	Good	Average
Intersection of Maxwell Road and Seymour Street	2	1	1	1	1	0	1	0	1	2	2	2	1	Average	Average	Average	Average
Scott Street	2	2	2	1	2	1	1	0	2	1	1	NONE	1	Average	Good	Average	Average
Average	2	2	2	2	2	1	1	1	2	2	2	2					

23/11/23 11am	Air Quality	Noise Pollution	Clutter	Cleanliness	Visual Pollution	Adequate Seating	Adequate Shelter	Adequate Green Space	Pedestrian Safety	Directional Signage	Footpath Condition	Cycle Lanes	Final Score 2023	Conclusion 2021	Conclusion 2019	Conclusion 2017	Conclusion 2015
Intersection of Leith Terrace and Russel Terrace	1	2	2	2	2	2	2	0	1	2	2	1	2	Good	Good	Good	Good
Intersection of Seymour Street and High Street	2	1	2	2	2	2	2	2	2	2	2	NONE	2	Good	Good	Good	Average
River bank area on Symons Street	2	1	2	2	2	2	1	2	2	2	2	NONE	2	Good	Good	Good	Good
Forum/Market Place	2	2	2	2	2	2	1	2	2	2	2	NONE	2	Good	Good	Bad	Bad
Queen Street, Liz Davidson Place	2	2	2	2	2	2	2	1	2	2	2	NONE	2	Good	Good	Good	Good
Charles Street	2	2	2	2	2	0	0	0	1	2	2	NONE	1	Average	Average	Average	Average
Market Street	2	1	1	2	2	2	2	0	1	1	2	NONE	1	Average	Good	Average	Average
Intersection of Arthur Street and Seymour Street	2	1	2	2	2	0	0	1	2	2	2	2	2	Good	Good	Good	Average
Intersection of Redwood and Main Street	2	0	1	1	2	0	0	0	2	2	1	NONE	1	Average	Average	Bad	Bad
Main Street	2	1	1	2	2	2	2	0	2	2	2	NONE	2	Good	Good	Average	Average
George Street	2	2	1	2	2	0	0	0	1	2	2	1	1	Average	Average	Average	Average
Intersection of Maxwell Road and High Street	2	2	2	2	2	2	1	1	2	2	2	NONE	2	Good	Good	Good	Good
Kinross Street	2	2	2	2	2	2	1	2	1	2	2	NONE	2	Good	Good	Good	Average
Intersection of Maxwell Road and Seymour Street	2	1	1	1	1	0	1	0	2	2	2	2	1	Average	Average	Average	Average
Scott Street	2	2	2	1	2	1	1	0	2	1	1	NONE	1	Average	Good	Average	Average
Average	2	1	2	2	2	1	1	1	2	2	2	2					

Appendix H: Blenheim CBD Street Vitality Map



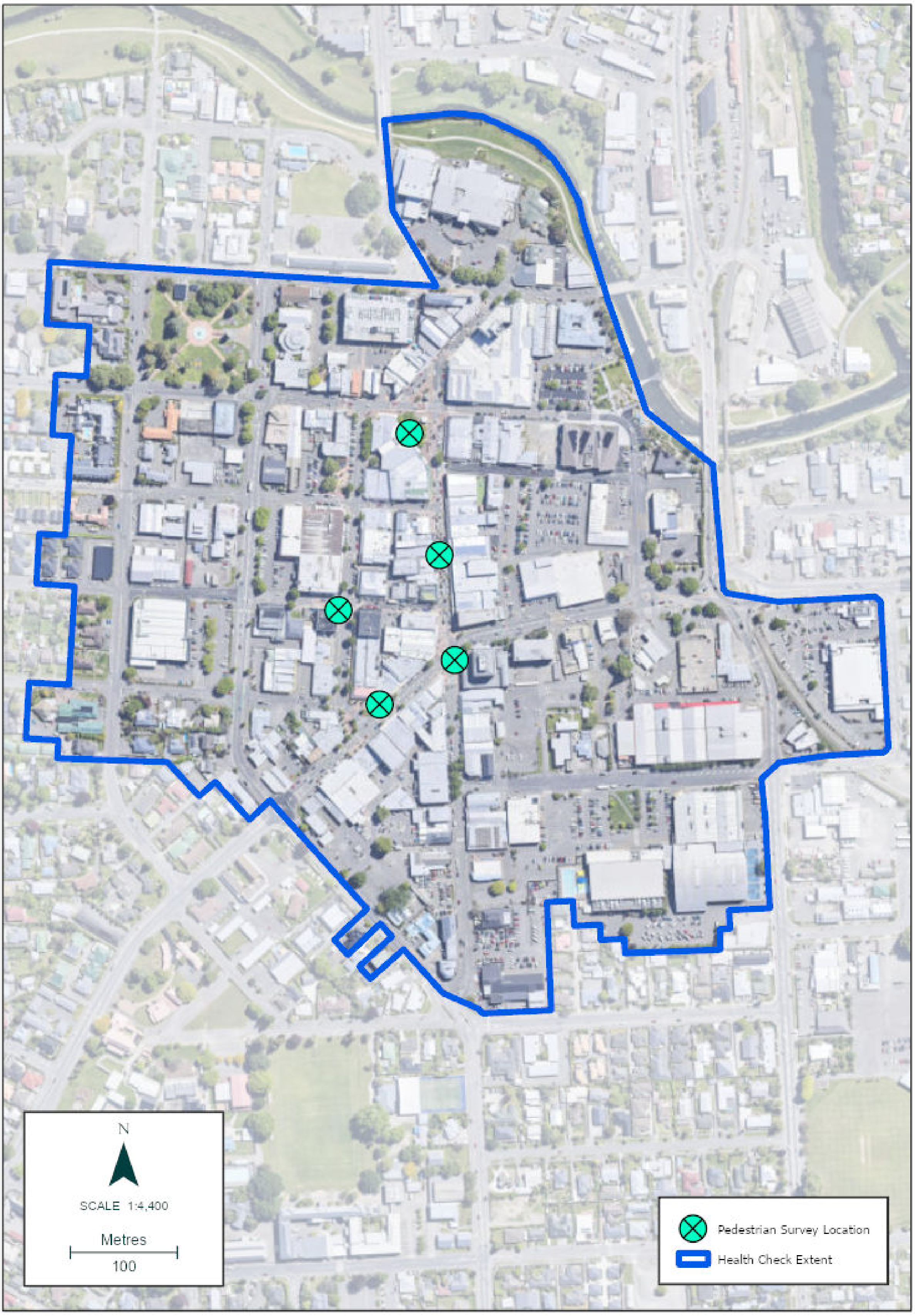
Appendix I: Blenheim Pedestrian Survey

1. Which part of Blenheim are you from?

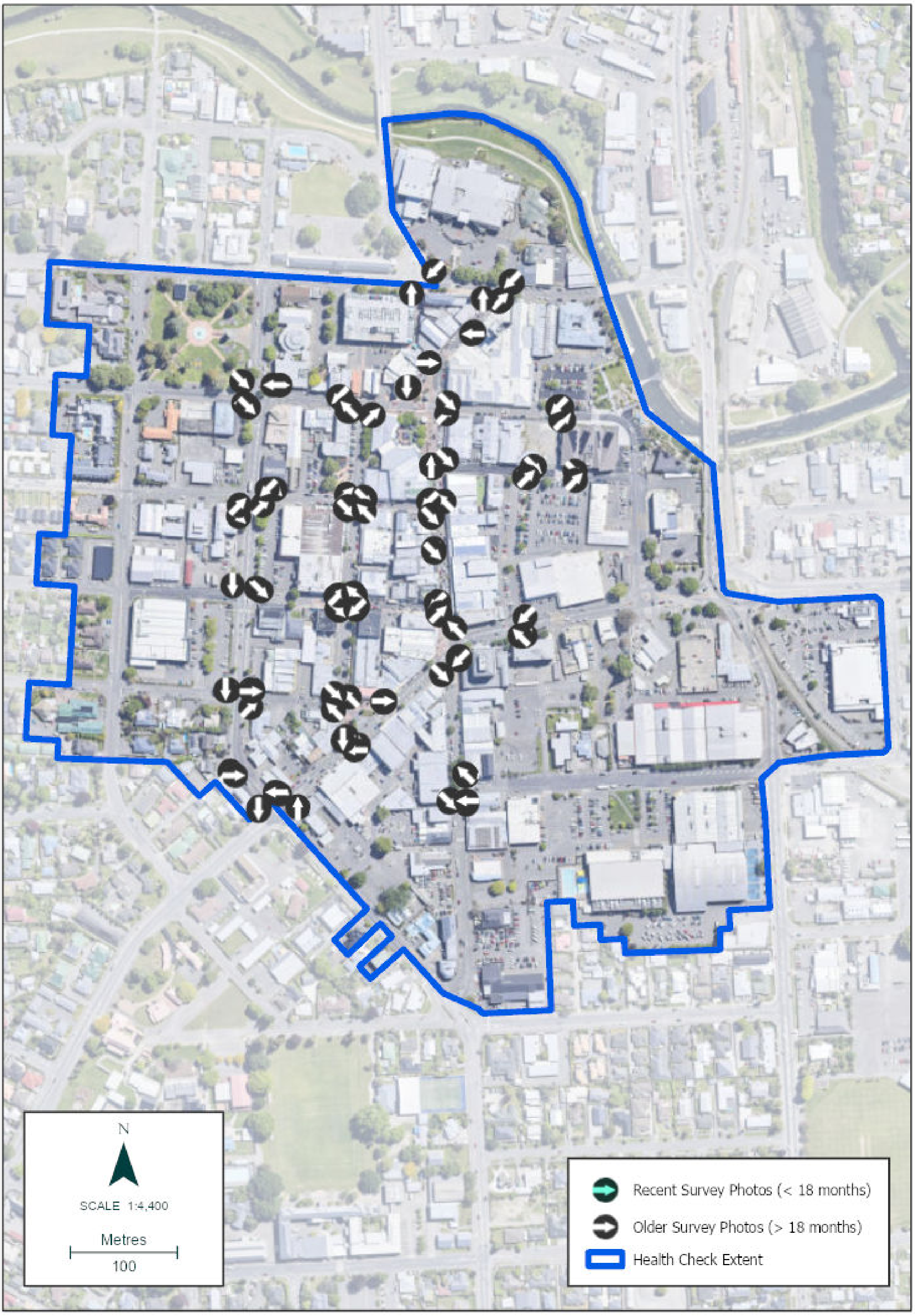
- Redwoodtown
- Blenheim Central
- Witherlea
- Springlands
- Other
- Renwick
- Riversdale
- Spring Creek
- Fairhall
- Grovetown
- Islington
- Yelverton
- Burleigh
- Riverlands
- Mayfield
- Omaka
- Rapaura
- Wither Hills
- Farnham
- Woodbourne

2. What are the three most common reasons for you to come into Blenheim's town centre?
   - Meeting friends
   - Café/Restaurant
   - Evening dining/Drinking
   - Entertainment/Leisure
   - Non-food shopping
   - Food shopping
   - Work
   - To engage in professional services
   - Bank/Post office
   - Other (Please specify)
3. How do you travel most often to Blenheim's town centre?
   - Walk from home
   - Walk from work
   - Drive
   - Cycle
   - Bus
   - Mobility Scooter
   - Other (Please specify)
4. If you drive, where do you park most often in the Blenheim CBD? (Please skip if not applicable)
   - Street parking (free, no time limit)
   - Street parking (free, limited time)
   - Street parking (metered)
   - Customer car park (free, limited time, e.g., Countdown/Warehouse)
   - Other (Please specify)
5. Do you find it easy to get around the BlenheimCBD? (Yes/No)
6. Please explain your response to the previous question. (Why/Why not)
7. What do you find the most attractive part of Blenheim CBD?
8. What do you find the least attractive part of Blenheim CBD?
9. How long would you spend per visit to Blenheim town centre?
   - 15 minutes (or less)
   - 30 minutes
   - 1 hour
   - 2-3 hours
   - 3+ hours
10. How frequently do you visit to Blenheim's CBD, excluding work?
    - Daily
    - Weekly
    - Monthly
11. Does Blenheim town centre provide everything you need? (Yes/Most of the time/No)
    - Amenities
    - Services
    - Retail
    - Daytime hospitality
    - Evening hospitality
    - Social areas
    - Entertainment/Tourism
    - Carparking
12. Do you think Blenheim's town centre has improved over the last two years? (Yes/No)
13. What would you like to see more of in Blenheim's town centre?

Appendix J: Blenheim Pedestrian Survey Points Map



Appendix K: Blenheim Photo Survey Points Map


N
SCALE 1:4,400
Metres
100
Recent Survey Photos (< 18 months)
Older Survey Photos (> 18 months)
Health Check Extent