

PICTON

# Town Centre Health Check

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DECEMBER 2021 – FEBRUARY 2022

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The research for this report, and production of the report was carried out by Will Macdonald over the summer period of 2021/22.

# Executive Summary

## Town Centre Health Check 2022 Conclusion

After collating collected data, the overall quality of the Picton CBD has improved over time. 57% of pedestrians stated improvement since 2020, also backed up by improvements to the state of the environment, and a similar quality of street vitality/pedestrian routes despite a 100% increase in vacancies. It is valid to mention the old second-hand shop on the corner of Wellington Street and Waikawa Road, and the old BP gas station on Auckland Street remain vacant since the previous check, which provides an opportunity for modernised developments – which are desires of the Picton community. Furthermore, CBD mobility is outstanding, a continuous increase of food and entertainment shops are enticing a vibrant atmosphere with outdoor options – however, pedestrians are still seeking more from the CBD in terms of retail variety to suit locals.

## Purpose

The 2021-22 Picton Town Centre Health Check is a report in continuation from four previous checks in 2014, 2016, 2018, and 2020 respectively. This report is designed to critically analyse and capture photographic data around the Picton Central Business District (CBD) consisting of different health indicators, which can be further analysed to illustrate trends and comparisons from previous years.

## Main Survey Findings

### Composition of the Town Centre

- Food and entertainment (28%) type businesses dominate the Picton CBD.
- The number of vacant buildings has doubled since 2020 (6 to 12).
- Comparison type businesses continue to decrease going from 17% (25 units) in 2018, to 12% (19 units) in 2021/22.

### Transport Facilities

- The Picton CBD offers adequate street-side parking within the CBD with the possible exception during peak times of the year.
- Available cycle facilities in the Picton CBD continue to provide adequate services.
- The Blenheim – Picton bus service is still available to residents/tourists.

### Pedestrian Routes

- The quality of CBD pedestrian routes has remained consistent to routes measured in 2020.

### State of the Environment

- The iSite on Auckland Street improved its rating from “average” to “good”.

### Vitality of the Town Centre

- High Street and London Quay continue to possess strong levels of vitality.
- A 100% increase in vacancies has affected high quality edges on North Wellington Street.

### Pedestrian Survey

- 142 responses – the most from any previous survey.

- 83% of respondents found the CBD easy to move around in – a 9% increase since 2020.
- The foreshore/waterfront continues to be significantly regarded as the most attractive part of the CBD.
- The Picton CBD more than adequately provides to pedestrian needs.

#### Picton CBD Spending

- The total money spent in Picton (\$76.7M) covers 10.5% of the total money spent in the Marlborough District (Jan 21 – Dec 21)
- 52% of people spending money in Picton are from Marlborough.

## Backgrounds and Methods

The 2021/22 Picton Town Centre Health Check is the fifth 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 Picton CBD was an exact copy of the version used during previous health checks (Appendix A).

The 2021/22 Picton CBD health check was conducted and produced over the months of December 2021 and January 2022, 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 Picton Town Centre Health Checks from 2014, 2016, 2018, and 2020.

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 2020 Conclusion

It is crucial to add the conclusion from the previous health check completed. The purpose of this is to provide an overall comparative summary to track progress of the CBD over time. This includes the overall state of the CBD, as well as comparing trends brought forward from the survey to make judgement on future planning.

*“Collating all this data together shows some significant trends and patterns to identify in terms of how people interact with and use Picton CBD. People are using the centre more often as a use for food and entertainment, but still seeking more from it in terms of retail. Pedestrians use the town centre less for typical consumer shopping and seek much from it in terms of better quality of the peripheral streets such as Auckland and Dublin Streets.*”

*The Foreshore, and northern parts of High Street continue to be well looked after and highly regarded whilst the southern end of High Street sees pedestrians wanting more improvement. Tourism in Picton continues to bring thousands of visitors in with the rise in cruise ship numbers helping bolster activity significantly.”*

# key stats

Number of vacancies **doubled**

from  
**6** units  
in 2020

to  
**12** units  
in 2022

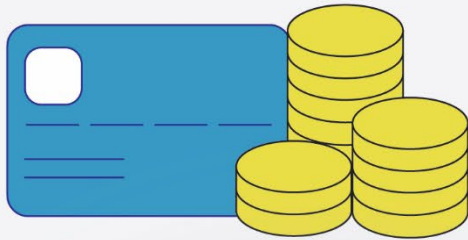
Second-highest number of vacancies since 2014



Spent in Picton  
from Jan 2021 to Dec 2021

**\$76.7M**

Median amount over the last five years



Food & Entertainment  
businesses are continuing to **increase**

from  
**29** units  
in 2014

to  
**43** units  
in 2022



**57%**

of survey respondents said the Picton CBD  
has **improved** over the last five years

compared  
to **49%** in  
2020

# Picton CBD Composition

## Purpose

The composition of the Picton CBD is made up of an arrangement of different business types. The purpose of gathering this information is to create an understanding of the various businesses that operate within the CBD. These findings are always changing from year to year, hence just how crucial this information is to the development of the health of the town.

## Method

To remain consistent with previous health checks to show 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.

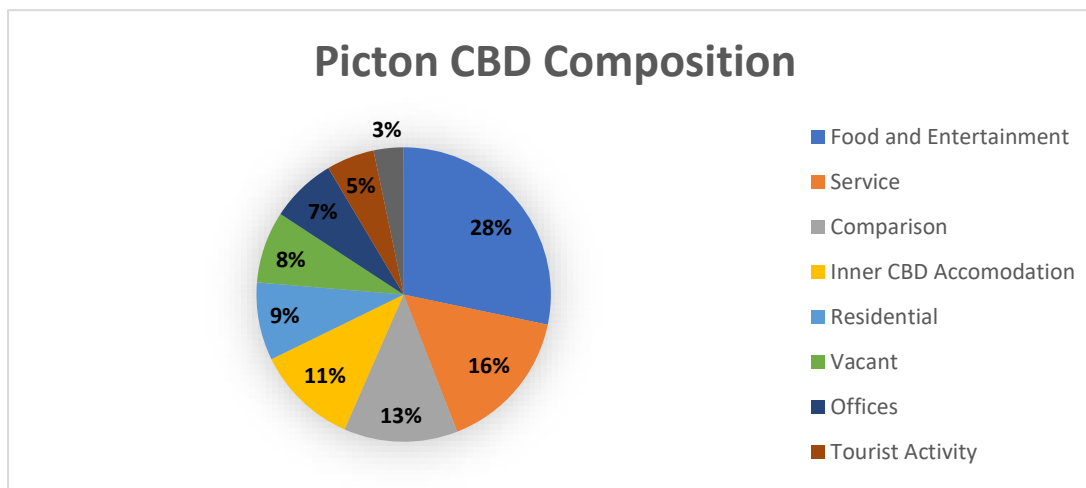


Figure 1. Pie graph showing the composition breakdown of different business categories in the Picton CBD.



## Findings

From the composition data collected, it is clear to see that food and entertainment type businesses dominate the Picton CBD, accounting for 28% (43 units). Since 2014, this number has increased from 21.3% (27 units), suggesting success in food and entertainment businesses in Picton. This is to be expected as Picton is a gateway town between the North and the South Islands and experiences many travellers onboard the ferry. Service, Comparison, and Inner CBD Accommodation type businesses collectively make up 39% (24 units, 19 units, 17 units respectively). In comparison to the previous health check, services accounted for 19% (28 units), comparison type businesses accounted for 15% (23 units), and inner CBD accommodation was the same at 11% (17 units).

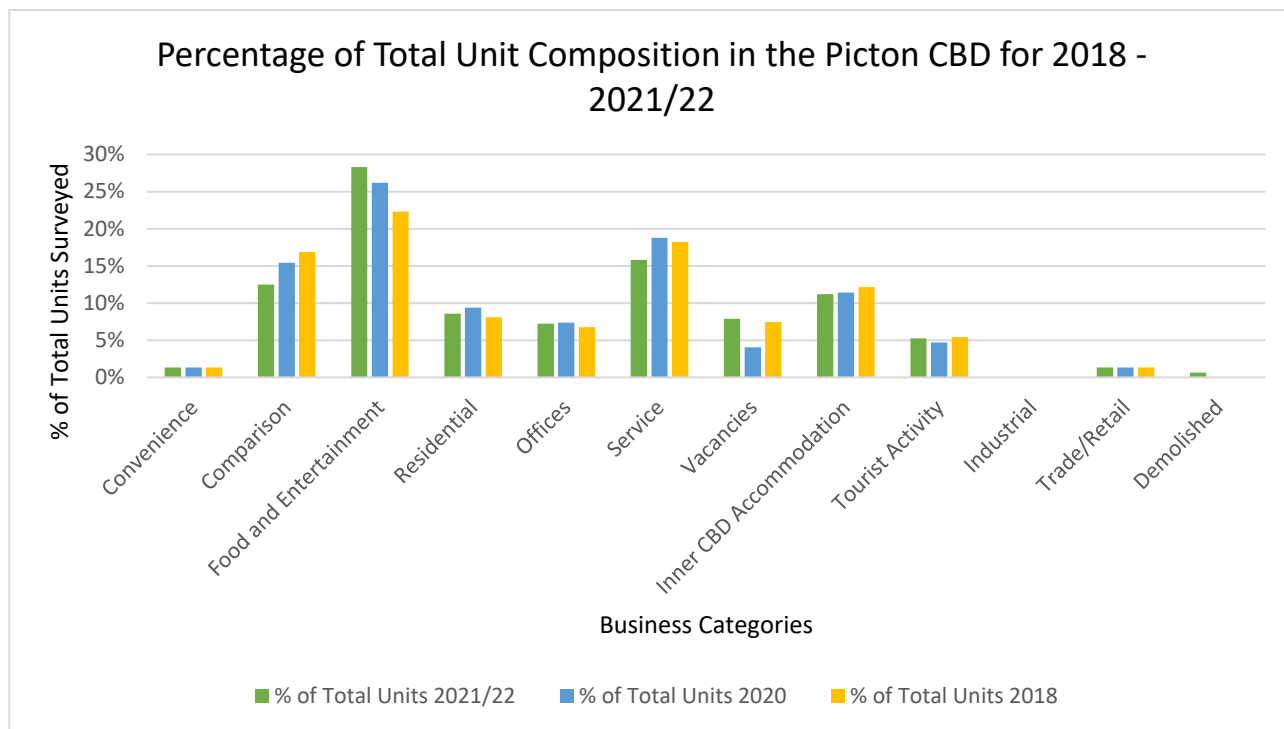


Figure 2. Graph identifying the trends between 2018 and 2021/22 for each business category.

Category	Number of Units 2021/22	% of Total Units 2021/22	Number of Units 2020	% of Total Units 2020	Number of Units 2018	% of Total Units 2018
Convenience	2	1%	2	1%	2	1%
Comparison	19	13%	23	15%	25	17%
Food and Entertainment	43	28%	39	26%	33	22%
Residential	13	9%	14	9%	12	8%
Offices	11	7%	11	7%	10	7%
Service	24	16%	28	19%	27	18%
Vacancies	12	8%	6	4%	11	7%
Inner CBD Accommodation	17	11%	17	11%	18	12%
Tourist Activity	8	5%	7	5%	8	5%
Industrial	0	0%	0	0%	0	0%
Trade/Retail	2	1%	2	1%	2	1%
Demolished	1	1%	0	0%	0	0%
Total	152	100%	149	100%	148	100%

Table 1. Number and percentage of units composed within the Picton CBD from 2018 – 2021/22.



When comparing the 2021/22 data with previous health checks completed, the general trend of each business category is fluctuating either way. There is a consistent positive trend in the percentage of food and entertainment businesses in the Picton Town Centre, going from 22% in 2018, to 26% in 2020, to 28% in 2021/22. Not only is Picton an essential connection between North and South Islands for the public but is also important for railway networks and freight movement. Picton is the gateway into the wider Marlborough Sounds area, and therefore is a hub for tourists/locals to experience the food/activities on offer. On the contrary, there is a consistent negative trend in the percentage of comparison type businesses, going from 17% (25 units) in 2018, to 15% (23 units) in 2020, to 12% (19 units) in 2021/22. This comes as no surprise given the size of Picton, after responding/recovering from COVID-19. Consumers are more inclined to exercise e-commerce shopping, with focus on comparison type businesses slowly diminishing. It is relevant to touch on vacancies within any CBD, as these properties reduce the vibrant feel of a town centre. The number of vacancies has doubled since the previous check in 2020, from 6 to 12 vacant buildings. This suggests the general appeal of the Picton CBD has slightly decreased. Meanwhile, convenience, office, inner CBD accommodation, service, and residential categories have more or less remained the same, providing stable opportunities for residents/tourists to utilise these businesses.

## Transport Facilities

### Parking

Over previous health checks, it has been observed that a high majority of people travel into Picton via car. This observation is seen again in 2021/22 with 70% of survey respondents driving. The high volume of cars entering Picton means parking facilities is essential. The Picton CBD offers plenty of limited-time street parking along all streets in the studied map, with exception to peak times of the year (see Appendix A). With this being said, rental car businesses on Auckland Street north occupy street-side parking (no time limit) with their company vehicles, and rental vehicles. This would reduce the number of free, street-side parking along Auckland Street north to residents and tourists.

### Cycle Facilities

There are cycle racks evenly distributed across the Picton CBD available to the public. These are mainly located on High Street, however there are cycle racks along the foreshore and off London Quay by Beachcomber Cruises. From the survey, 6% of respondents cycle to the Picton CBD, suggesting that cycle facilities around Picton are suitable for the volume of cyclists. It is worth noting the absence of cycle lanes in the Picton CBD, however, there is no real urge within the CBD as Auckland Street, High Street, and Wellington Street are all wide roads with plenty of room for cyclists.

### Public Transport

The Picton – Blenheim Bus Service operate on Tuesdays and Thursdays from 9am – 3pm excluding on public holidays. This service completes two return trips during the day making nine stops at locations in Picton, Spring Creek, and Blenheim, finishing at 3pm. In Waikawa and Picton, the service operates as a hail and ride service where passengers can wave the bus down anywhere along the designated route provided there is a safe place to do so. Starting this service in either Blenheim or Picton is \$4 for an adult, \$2 for children aged 5-15, and free for SuperGold card holders and children under the age of 5. However, starting the service in Spring Creek (halfway point) is \$2 for adults, \$1 for children aged 5-15, and free for SuperGold card holders and children under the age of 5.

Those arriving on ferries, the Interislander and Bluebridge ferry terminals remain well laid out with the neighboring rental car company offices. The train is another form of transport that people can take to access Picton. The Marlborough Flyer travels between Picton and Blenheim as a tourist activity, whilst the Coastal Pacific Train is still running between Picton and Christchurch. In terms of water transportation, tourists and residents can access the Marlborough Sounds by water taxis or smaller cruises with a regular timetable. While

public transport options are relatively good for tourists, there is still no taxi equivalent service for residents to move around town, although, there is a shuttle service.

## Pedestrian Route Quality

### Purpose

The purpose of measuring pedestrian routes of high usage is understanding whether popular routes are of a desired standard. The information gathered shows the stronger pedestrian routes within the Picton CBD and provides a snapshot of routes that need improvement.

### Method

Observed via a walking survey, 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
<ul style="list-style-type: none"> <li>• Good visibility</li> <li>• Wide footpaths</li> <li>• The footpath is a different material to the road, high quality</li> <li>• Lots of lighting</li> <li>• Adequate seating</li> <li>• Canopies</li> <li>• Zebra crossing</li> <li>• Signalised pedestrian crossing</li> </ul>	<ul style="list-style-type: none"> <li>• Pedestrian refuge</li> <li>• This footpaths for one person</li> <li>• Potholes</li> <li>• Pollution</li> <li>• Not much lighting</li> <li>• Some difficulties with pram</li> <li>• Unclear boundaries of footpath</li> <li>• Poor pedestrian safety</li> </ul>	<ul style="list-style-type: none"> <li>• Poor pedestrian safety</li> <li>• Not accessible/workable with a pram</li> <li>• No footpath</li> <li>• High speed traffic on the road next to the footpath</li> <li>• Parking intruding onto the footpath</li> <li>• Lack of lighting</li> <li>• No seating</li> <li>• Dirty</li> </ul>

### Findings

After comparing high usage pedestrian routes within the Picton CBD with previous health checks, the conditions of these have not changed. There were no changes in existing popular routes, with the majority of these routes being deemed “good”. Pedestrian routes along the foreshore and either side of High Street remain at a “good” ranking due to the vibrant lighting, and quality of the footpaths. Auckland Street south was average overall, and Dublin Street and Waikawa Road at the intersection of Waikawa Road and Wellington Street continued to receive a “bad” rating due to the width and quality of the footpath, as well as high speed traffic next to the footpath affecting pedestrian safety. Overall, however, the quality of high usage pedestrian routes in the Picton CBD are of a desired standard and perform highly against the criteria.

## State of the Environment

### Purpose

The sole purpose of measuring the state of the Picton CBD environment is to understand the quality of the town centre we all use. By gathering this information, conclusions can be made on the current state, and in comparison, to previous measures to gain insight on how the Picton CBD is progressing, remaining at the same quality, or declining in quality. Measuring the state of the environment in various places around the CBD illustrates the overall quality and therefore, enables processes of change to take place given that some locations within the CBD are of higher quality.

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

It must be noted that determining this data was by perspective, on the two days that state of the environment was measured. It is also important to note 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 on the day measures took place.

Each location was ranked against this criterion for a score of 0, 1 or 2 which corresponded to bad, average, or good environmental conditions respectively. After gathering this information, all locations were averaged and rounded via Excel to produce a final rating ranging from 0 (bad), 1 (average), or 2 (good). All locations around the Picton CBD were surveyed twice on the following dates and times: (12:45 – 1:30pm on 13/12/21, and 3 – 4pm on 21/12/21).

## Findings

After comparing the results (Appendix G) with previous years, the general conclusion is positive showing consistent and improving areas. The iSite on Auckland Street scored higher compared to the previous check going from “average” to “good”, whereas all other locations remained at the same quality. These findings are extremely positive to the Picton CBD environment, however, three locations (intersection of Auckland Street and Dublin Street, intersection of Waikawa Road and Wellington Street, and the intersection of Broadway and High Street) received an “average” rating given their insufficient observations in particular criterion.

It is worth noting a potential introduction of a “great” level of quality for locations like both locations on London Quay (the intersection of London Quay and High Street and the intersection of London Quay and Wellington Street), as well as outside the aquarium which were extremely well-maintained locations. This is a potential chance to distinguish between extremely well-maintained locations and well-maintained locations within the Picton CBD.

# State of the Environment

Overall averages

2

Air Quality

2

Noise Pollution

2

Clutter

2

Cleanliness

2

Visual Pollution

1

Adequate Seating

1

Adequate Green Space

1

Adequate Shelter

2

Pedestrian Safety

2

Directional Signage

2

Footpath Condition

2

Overall

## Street Vitality

### Purpose

The purpose of gathering information on street vitality is to analyse the overall attractiveness, activeness, and general appeal of the Picton CBD. This is a crucial element to the health check as it illustrates pedestrian behaviour and how they interact with buildings/building fronts around the town centre.

### Method

Gathering this information was undertaken following the same method from previous health checks via a walking survey around the Picton 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

After comparison, the quality of street edges in the Picton CBD were similar to previous checks. High Street and London Quay possessed the strongest levels of vitality given the large quantity of cafes/bars/restaurants and the open-plan shop layout with plenty of seating on such wide, customer friendly footpaths. The London Quay walkway by the boat berths show strong levels of vitality with large inviting windows. Both Auckland Street and Wellington Street south continue to fall into the “very weak” category as residential property and backpackers occupy this space, offering crowded, small windows with a number of blank walls. There were a few changes on High Street and Wellington Street north with the increasing number of vacant buildings (which increased by 100%), decreasing the aesthetic appeal that cafes and highly inviting shops used to operate in those spaces.

## Pedestrian Survey

### Purpose

The pedestrian survey is designed to gather a collective view of how the Picton CBD is received. It is a chance for locals to comment on both strengths and weaknesses of the CBD, so that any issues are highlighted, and conversely, any improvements that have been made, and that could be made are acknowledged. This survey aims to ensure that Picton can continue to provide adequate services to both residents and visitors.

### 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, 484 respondents answered the survey, 142 of which were for the Picton CBD. In comparison, these numbers were far more than previous checks, given that only 83 responses were obtained in 2020.

## Findings

### Composition of Pedestrian Survey

The large majority of respondents were from Picton, followed by a small number of respondents from the Marlborough Sounds. The top locations people visited the town centre were Picton (85%), Marlborough Sounds (6%), as well as Blenheim, Springlands, Tuamarina, Spring Creek, and other making up 8% (rounding). According to the 2020 survey, 31% of the respondents were from Blenheim, compared to only 1% this year. This may be due to the direct media posts towards Picton residents, however, there were multiple surveys conducted in-person, in the Picton CBD.

### Reasons for Visiting the Picton CBD

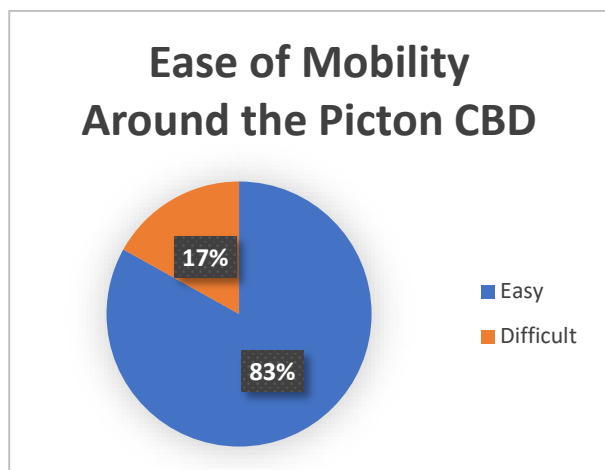
Given that COVID-19 has put a halt on international travel, food shopping (25%) has overtaken entertainment/leisure as the most popular reason for visiting the Picton CBD since the previous survey. At 21%, visiting cafes/restaurants is a close second – which is in line with the previous survey. The previous survey results saw evening dining/drinking as the least popular reason for visiting the CBD, which is now both engaging in professional services and bank/post office categories. This is not surprising given the increase of food and entertainment type businesses identified during the CBD composition, providing pedestrians with different evening dining/drinking options. The bank/post office option isn't surprising either, as there is no banking facilities in Picton anymore – providing frequent Picton CBD visitors to make the trip to Blenheim to utilise banking, and professional services.

### Travelling to the Picton CBD

The number of people entering the CBD via car has dropped 6% since 2020 to 70%. However, driving to the CBD still dominates other travel methods in 2022. Interestingly, 21% of respondents would walk to the CBD from home, which makes sense given the relative size of Picton and the central positioning of the CBD.

43% of those who drove would utilise free street parking with limited time, followed by 19% of respondents choosing to utilise customer carparks (such as the Mariner's Mall carpark). Free street parking with no limit and the 'other' option, which included work designated carparks received 16% and 11% of responses respectively.

### Ease of Access



In terms of mobility around the Picton CBD, 83% of respondents say it is easy rather than difficult due to its small, compact layout, as well necessary shops within a small walking distance. The remaining 17% of respondents who argued against easy mobility stated poor footpath conditions, too much clutter on High Street, and not enough signage at courtesy crossings – causing pedestrians to walk out in front of cars as reasons for difficult mobility. In comparison to the previous survey, 74% of respondents said the CBD was easy to access/move around in. Given that there were 59 more responses this year, a 9% increase in 'easy' responses is a positive result for the CBDs flow.

### Attractive and Unattractive Aspects

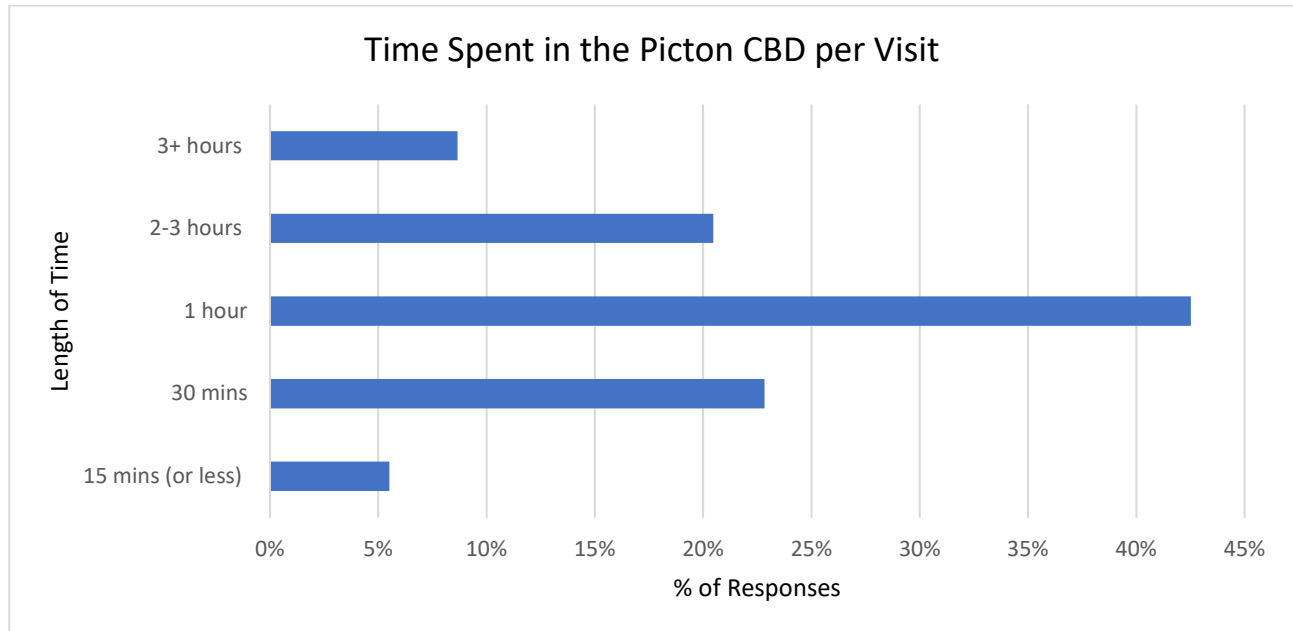
To ensure consistency with the previous survey, this question was left open-ended for respondents to answer with their thoughts and ideas. The foreshore/waterfront area was significantly regarded as the most attractive area in the minds of Picton pedestrians – consistent with previous survey responses. Other frequent responses



included High Street and London Quay, outside dining options along the waterfront, and the number of trees and plantation along High Street.

In terms of less attractive areas of the CBD, the most frequent answers included the Atlantis Backpacking building – as it is one of the first buildings people see coming off the ferry, the south ends of both Wellington and High Streets, and the zebra crossings at roundabout exists. Less frequent responses included how out-dated Mariner’s Mall is, a lack of art, and a shortage of parking along High Street.

### Time Spent in the CBD



The average amount of time pedestrians spent in the Picton CBD was 1 hour at 43% of responses. A close second was 30 minutes spent at 23% of responses. Compared to the previous survey, 2-3 hours was the most popular length of time at 42%, and was the first year where ‘1 hour’ was not the most popular option. It was stated that this was due to the number of Picton survey responses from Blenheim residents, however, given 85% of responses were Picton residents, ‘1 hour’ and ‘30 mins’ options were again favourable. This is most likely due to Picton residents visiting the CBD to do what they need to in a shorter period of time, as opposed to non-Picton residents spending hours in the Picton CBD as per previous years.

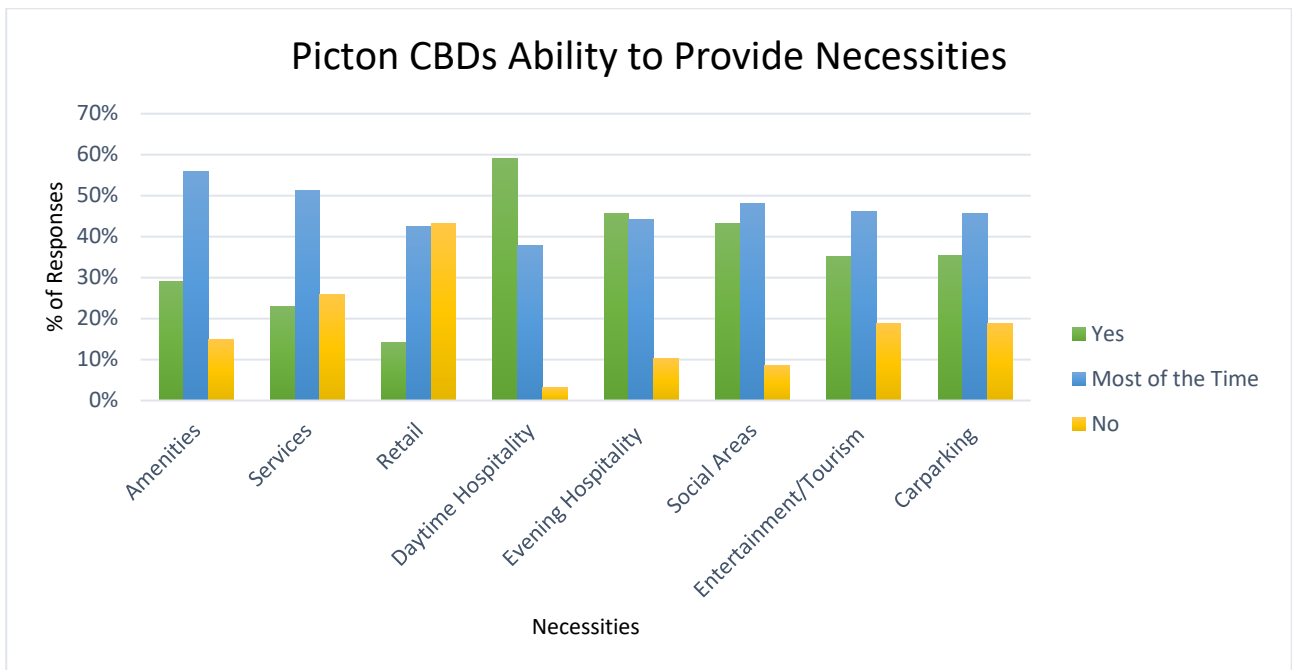
### Frequency of Visiting the CBD

Slightly more than the previous survey, 50% of respondents would visit the Picton CBD on a weekly basis. 43% of respondents would visit daily. These proportions complement the survey composition results, which saw 85% of responses coming from Picton residents, suggesting they visit the CBD to do what they need to, which most of the time is weekly/daily tasks.

- Daily responses – 43%
- Weekly responses – 50%
- Monthly responses – 7%

### Picton CBDs Ability to Provide



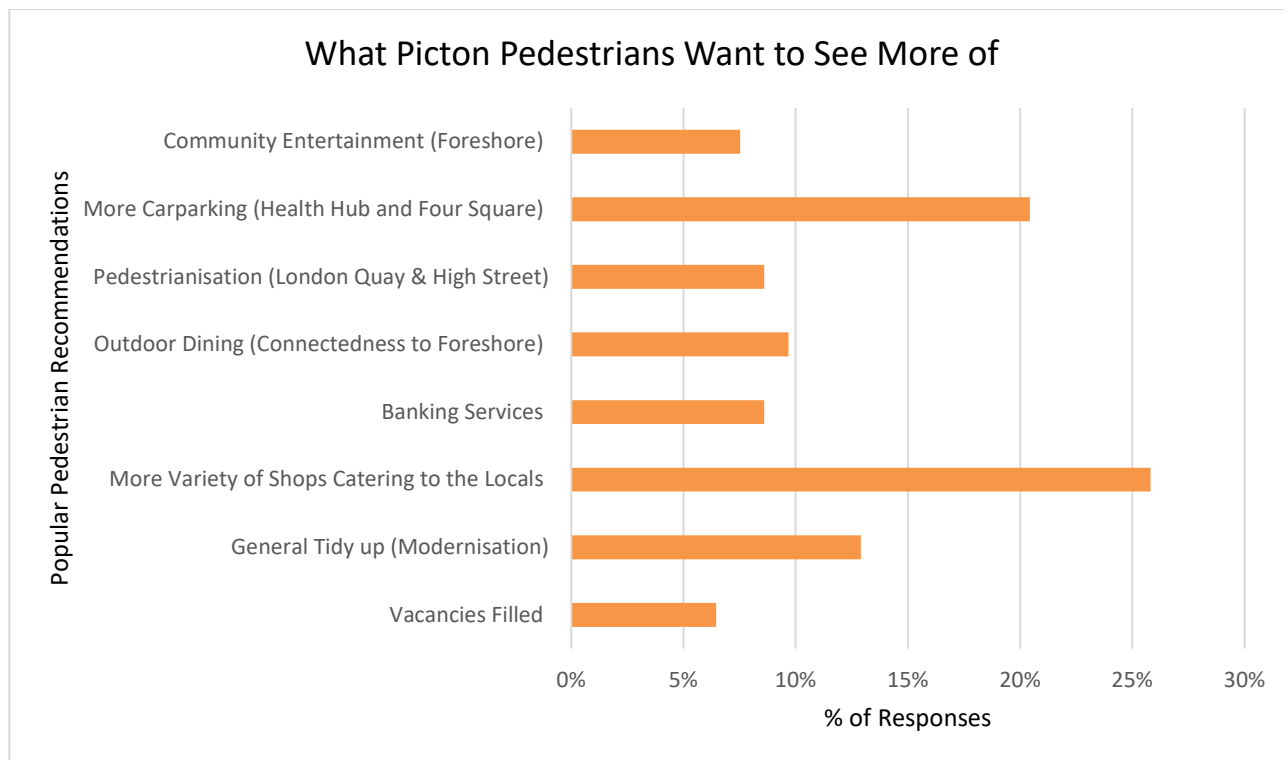


Respondents were very happy with both daytime and evening hospitality and social areas, given the large number of ‘yes’ and ‘most of the time’ responses for each necessity. Amenities, entertainment/tourism, and carparking were necessities respondents deemed satisfactory in terms of being able to provide to their needs. However, services and retail failed to adequately provide in the minds of pedestrians. Without any banking services in Picton, it makes sense that 26% of respondents found this necessity unsatisfactory in terms of providing to their needs. Comparison shops are tourist-centric, forcing Picton residents (85% of respondents) to travel to Blenheim (or elsewhere), or shop online – hence 43% of retail responses were negative. Overall however, for what Picton is, the large number of ‘yes’ and ‘most of the time’ responses across all necessities suggests the Picton CBD more than adequately provides to residents/visitors.

### Improvement

Picton pedestrians were asked if they thought the Picton CBD had improved over the last 2 years. 57% of respondents said they felt it had, while 43% said it hadn’t. In comparison to the 2020 survey, 49% of respondents felt the CBD had improved, while 51% felt it hadn’t – a 8% increase in positive responses. It’s important to mention this question does not ask for an explanation and a proportion of no answers may represent people being neutral on the matter. Perhaps in future survey designs, a neutral option is added and a question regarding why or why not these answers are given would be beneficial for the findings.

## Recommendations



Consistent with previous surveys, this question was left open-ended for respondents to answer how they see fit. The graph represents the most frequent responses from this question, where other responses not as frequent were left out. More variety of shops catering to locals was the most frequent answer at 26%, where pedestrians named deli, butcher, street food, and general high-end retail as desired shops. Following this was an increase in carparking – namely outside both the Health Hub, and the Foursquare. Comments were also made about carparks suitable for cars with boats and caravans, given the presence of the Marlborough Sounds and various holiday locations around Picton. Compared to the 2020 survey where developments to High Street was the most popular answer, pedestrians have shifted into wanting the town to suit locals more in terms of shopping – slightly stepping away from the ‘tourist-centric’ vibe. Perhaps due to less tourists and/or the impact of COVID-19, this may be a short-term situation. However, 85% of respondents were Picton residents, providing justification for focused responses on this shift.

Other responses included a general tidy up of the CBD, where pedestrians stated road quality, general modernisation of buildings, and frequent maintenance of rubbish bins as focus points for this theme. As well as community events – specifically along the foreshore, pedestrianisation of both High Street and London Quay, celebrating outdoor dining options on the waterfront, and banking services – given that Picton is now without a bank.

## Picton CBD Spending

### Purpose

This is a new and informative segment to the Picton Town Centre Health Check. Through an online subscription with Market View, the Marlborough District Council is able to view and analyse every card (eftpos and credit) transaction in the Marlborough region. The purpose of this data is to provide an overview of when card transactions are made in Marlborough (data going back to January 2016), where the cards were used, approximately how much was spent, and the city/country of origin the spenders are from. From this, analysis can be made on popular areas of the Picton area and conclusions can be drawn about the overall

financial state of Picton. It must be stated that Market View cannot produce a Picton CBD vs rest of Picton statistic, Picton is analysed as a whole. Further, this only accounts for card transactions and isn't a complete representation of cash flows in Picton.

Findings

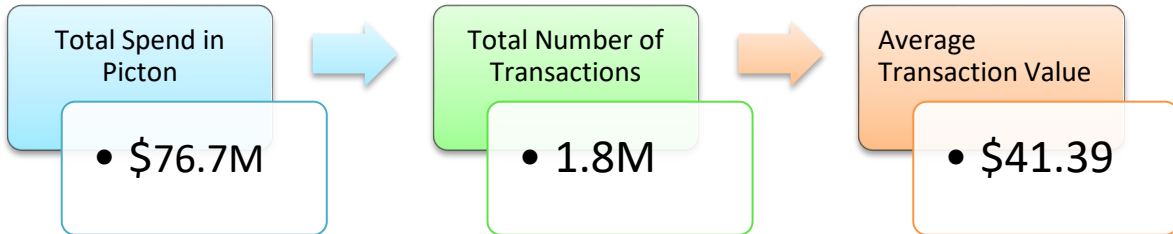


Figure 3. Overview of period Jan 21 – Dec 21.

In Picton during the period Jan 21 – Dec 21, \$76.7M was spent over 1,853,810 transactions, averaging \$41.39 per transaction. In comparison, during the period Jan 20 – Dec 20, \$74.5M was spent over 1,732,590 transactions, averaging \$43.02 per transaction. Total money spent in Picton increased by 2.9%, the number of transactions increased by 7%, however, the average transaction value decreased by 3.8%. The total spend in all of Marlborough was \$728.1M over 14,658,449 transactions, averaging \$49.67 per transaction. This means the total spend in Picton covered 10.5% of the total Marlborough Spend during period Jan 21 – Dec 21.

To put this in perspective, Picton is responsible for 9.3% (4,790) of the total Marlborough population (51,500) and contributes 10.5% (money spent) to the Marlborough District. This is a reasonably healthy contribution given the relative size of Picton. It is important to further note that this focuses on Picton as a whole, and not specifically the Picton CBD given the amount of available data the MDC has access to.

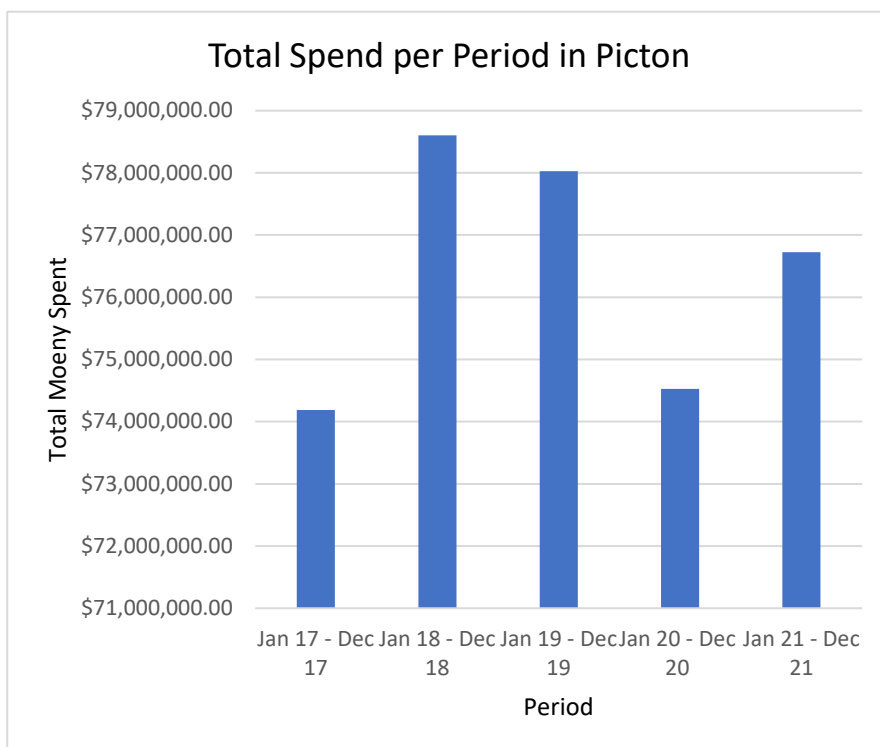


Figure 4. Graph showing the total spend per yearly period in Picton.

Figure 4 shows the total money spent in Picton in an increase-decrease-increase fashion since January 2017. However, for period Jan 17 – Dec 17, total money spent was the lowest in the last five years. At \$74.1M, only being a small difference from the following increase during Jan 18 – Dec 18, suggests the negative impact of the November 2016 Kaikoura earthquake. This 7.8 magnitude event (dubbed the most complex earthquake studied) significantly shut off roads accessible to the top of the South Island. Hence, the total money spent was a five-year period low.

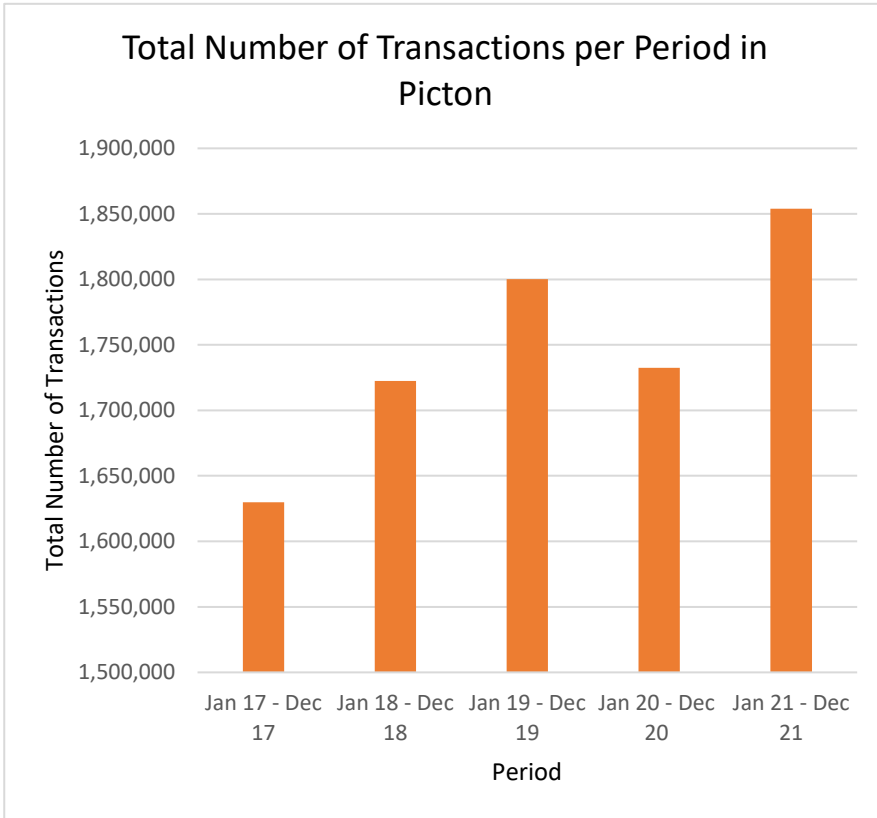


Figure 5. Graph showing the total number of transactions per yearly period.

Figure 5 shows a dominant positive trend since January 2017. From period Jan 17 – Dec 17, just under 1.65M transactions has increased to over 1.85M. This is a positive and exciting trend as educated conclusions can be made to the rising number of Picton residents and visitors spending money. However, as discussed below, the average transaction value for the Jan 21 – Dec 21 period was 3.8% less than the previous period. Nonetheless, the number of transactions, regardless of the value per transaction, is increasing each yearly period.

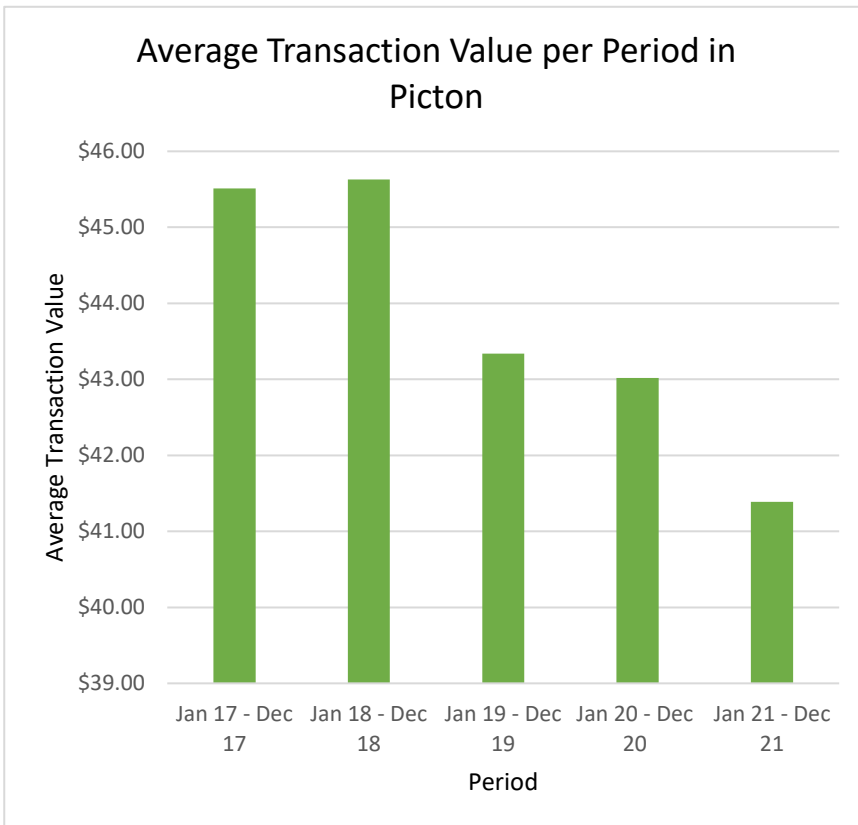


Figure 6. Graph showing the average transaction value per yearly period in Picton.

Conversely, figure 6 shows a dominant negative trend. This suggests Picton residents and visitors' tendencies are changing. Both period Jan 17 – Dec 17, and Jan 18 – Dec 18 saw the highest average transaction value at \$45.51 and \$45.63 respectively. However, since then, the average transaction value has continued to decrease to \$41.39 during period Jan 21 – Dec 21. The increase in vacancies, and the decrease in comparison shops in Picton may be relevant to this trend, affecting what consumers want/need to buy. Consumer demand is always changing, suggesting possible justification for the decrease in average transaction value for Picton residents and visitors.

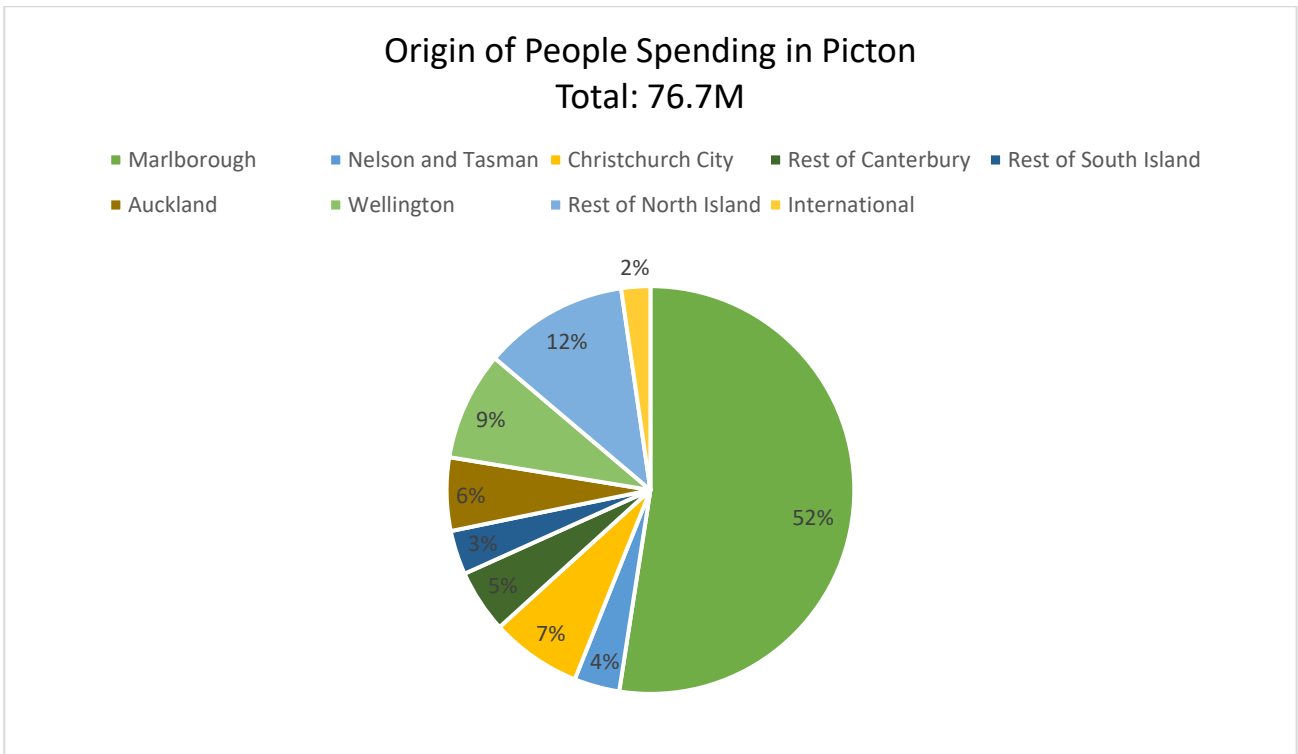


Figure 7. Pie Graph showing the origin of people who spend in Picton.

It is to be expected the 52% (\$40.2M) of people spending in Picton are from the Marlborough District, increasing 1.4% from the previous period (Jan 20 – Dec 20). It is unusual to see the second largest geographic contributor to Picton spending is the North Island, excluding Auckland and Wellington. These two cities make up a huge amount of the North Island, contributing 14.4% of spending in Picton, raising the discussion point of the rest of the North Island contributing 11.5%. It is worth noting that Blenheim residents who have their cards connected to banks from out-of-town fall into these geographic areas as opposed to Marlborough, as this may add to different cities/regions having more or less of a contribution in Marlborough. Picton was responsible for 12.6% share of the Marlborough Districts transactions (including Blenheim CBD, rest of Blenheim, Picton, Renwick, North Marlborough, and South Marlborough). It is relevant to comment on the 2.3% of international spenders, which saw a decrease of 8.7% from the same period last year, showing the utter disruption that COVID-19 has brought to Picton.

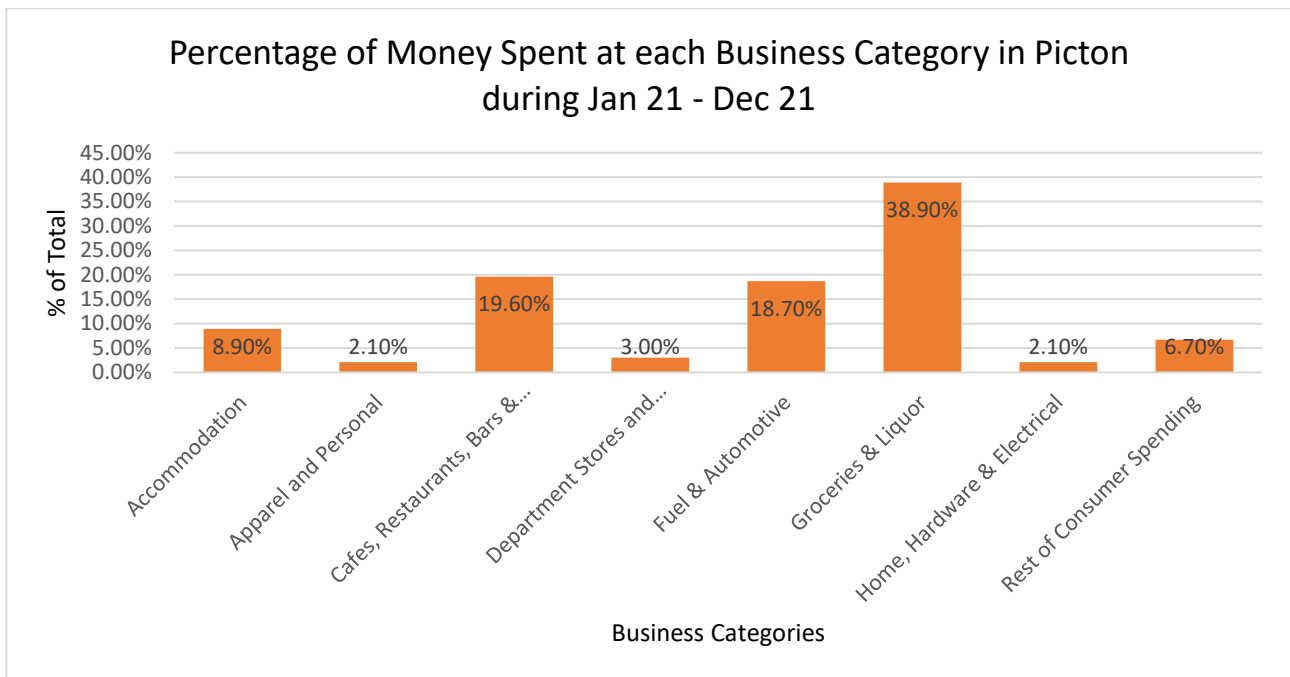


Figure 8. Graph showing the distribution of money per business category in Picton.

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

Figure 8 shows groceries & liquor accounting for 38.9% of the total spend in Picton, almost double cafes, restaurants, bars, and takeaways being the next largest contributor of money spent. More specifically, the grocery & liquor sector made up \$29.9M of the total \$76.7M spent in Picton during the period from Jan 21 – Dec 21. Although the food and entertainment type category accounts for 28% (largest) of Picton’s composition (Table 1), it is to be expected that the grocery & liquor sector contributes the most as necessities to live are provided. Given the large number of different public transport available to Picton residents, including water transport, the fuel and automotive category is rightfully high, as well as the rest of consumer spending knowing that public transport falls into this category. It is safe to assume that purchases at petrol stations and automotive repair shops are frequent and are above the average transaction value (Figure 3). Inner CBD accommodation accounts for 11% of the Picton CBD composition (Table 1), with 8.9% of Picton’s total spend coming from this category. \$6.8M was contributed to this category during the period Jan 21 – Dec 21, which is surprisingly up 0.2% from the same period last year. Evidently, the apparel & personal category is not favourable in Picton given its 2.1% contribution, ultimately decreasing in contribution by 0.1% from the same period last year, which suggests the power of e-commerce and online shopping as a popular purchasing method for this category.



# Side-by-Side Comparisons

High Street 2009 vs 2022



Cortado revamp



Picton Library – Development



Mariner's Mall/Fresh Choice revamp



Other areas 2009 vs 2022



London Quay 2009 – E Ko Tours



Wellington Street 2009 - Vacant



Auckland Street 2009 - Vacant

(Please note images from the past are dated year 2009 as Google maps was unable to produce images from 2011).



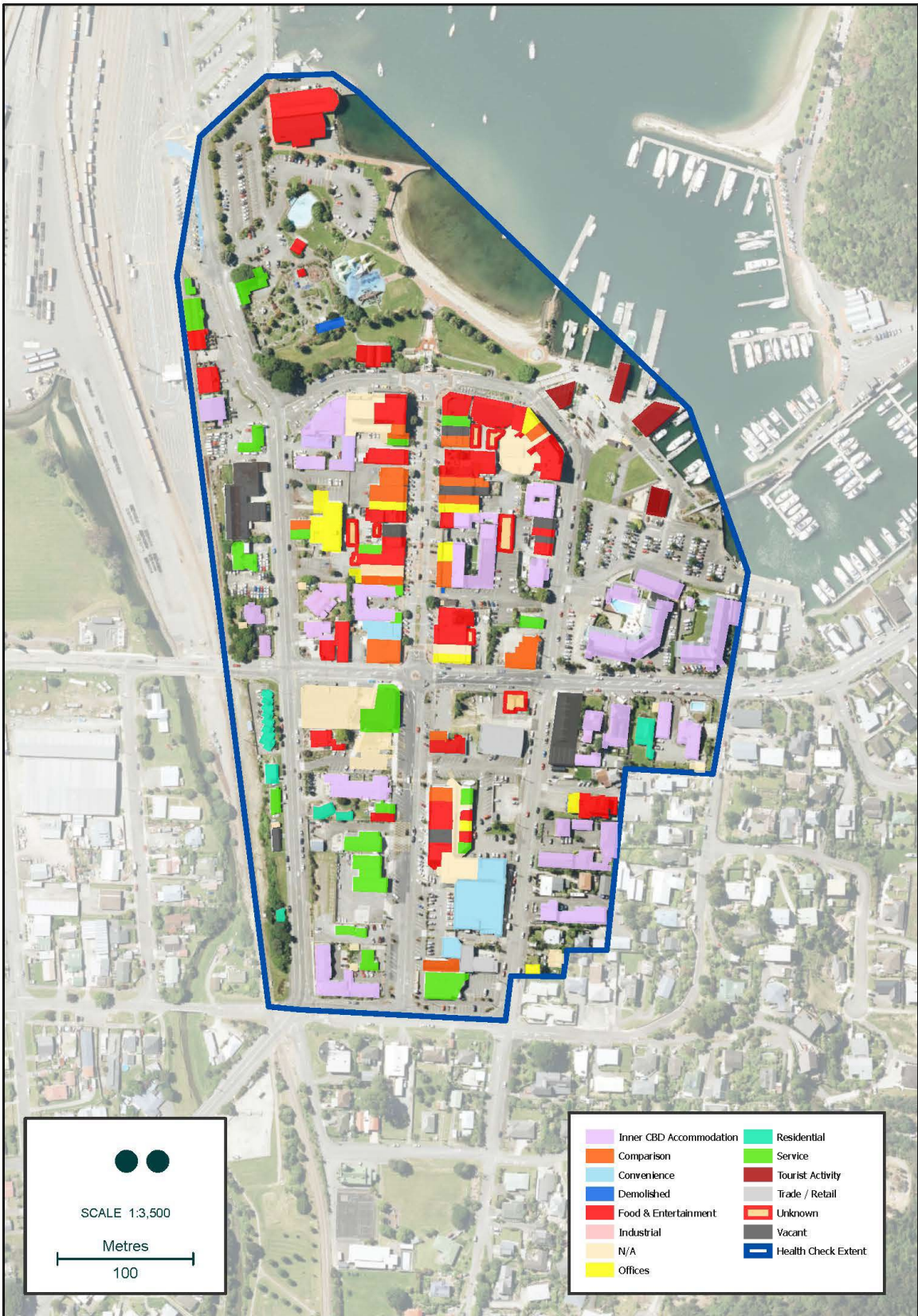
# Appendices

## Appendix A: Picton CBD Map



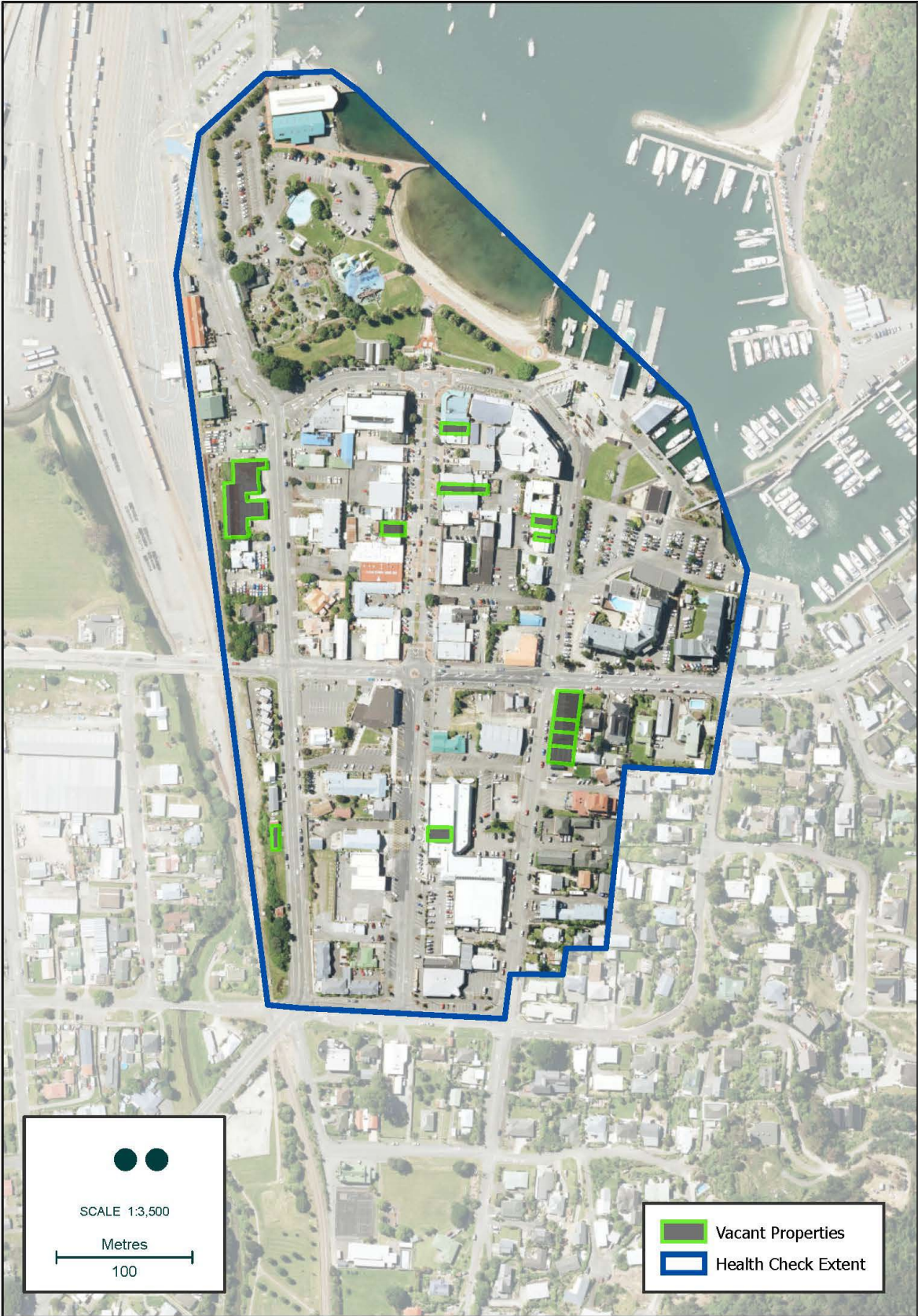


Appendix B: Picton CBD Composition Map



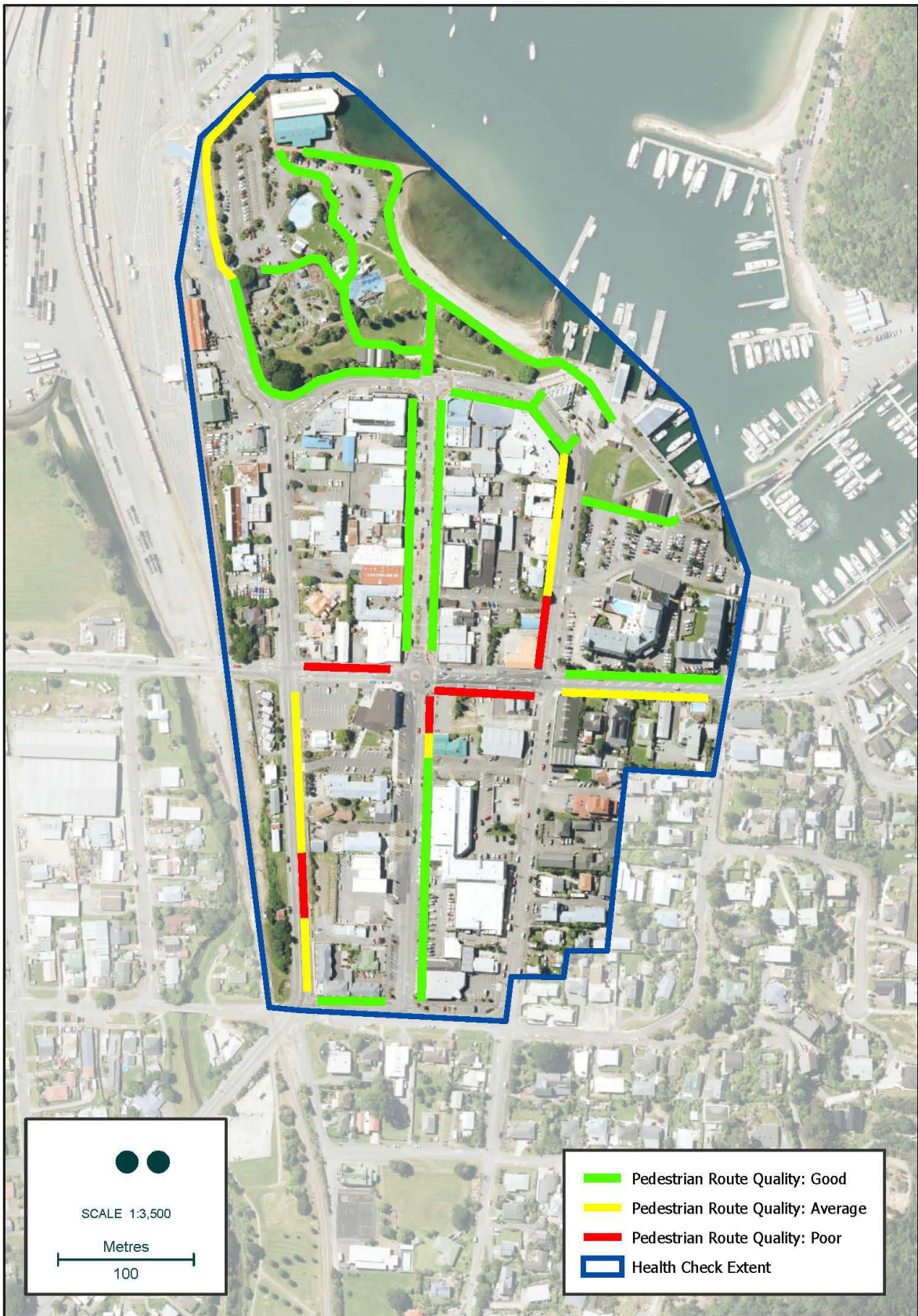


Appendix C: Picton CBD Vacant Properties Map



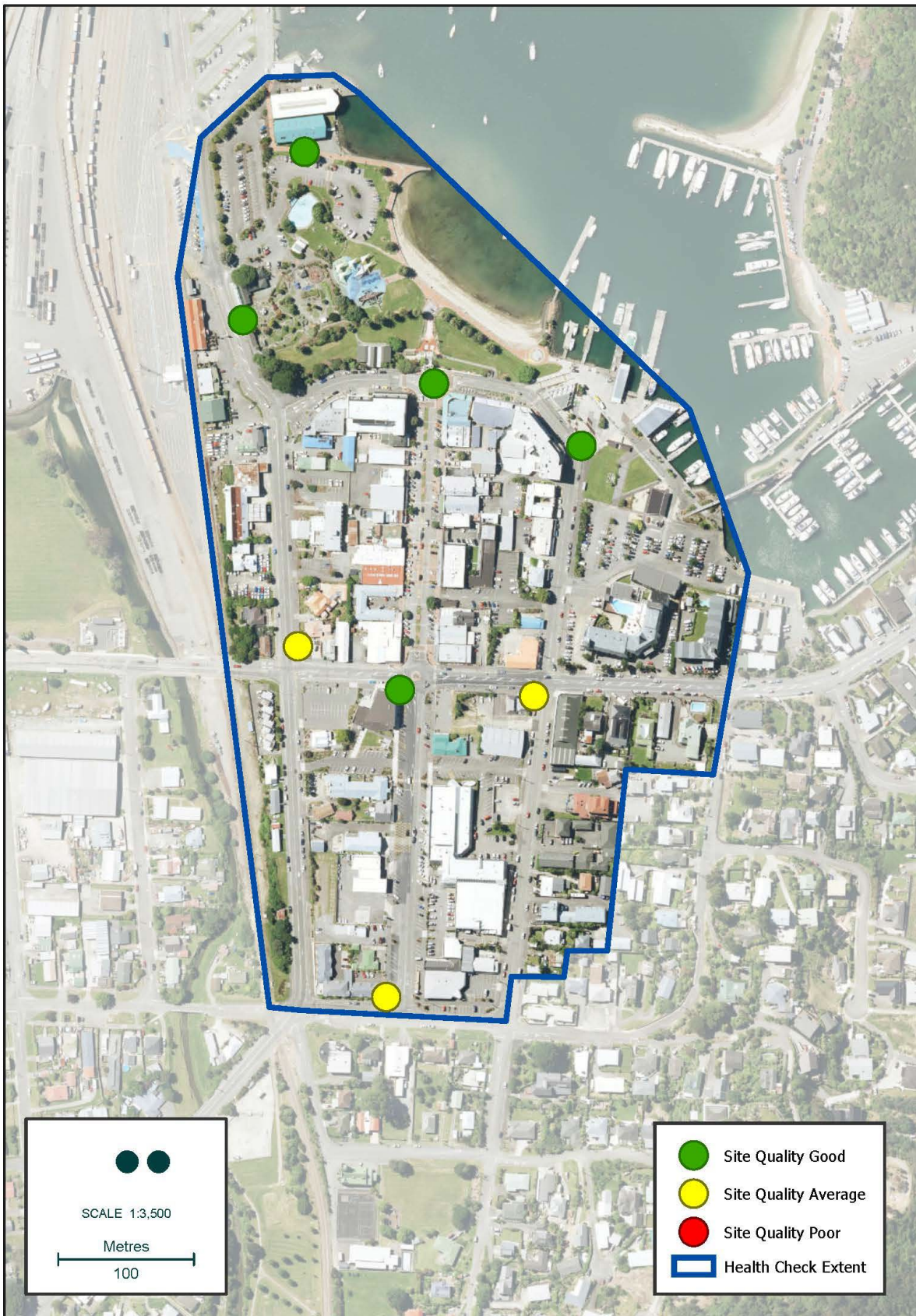


Appendix D: Picton CBD Pedestrian Routes Map



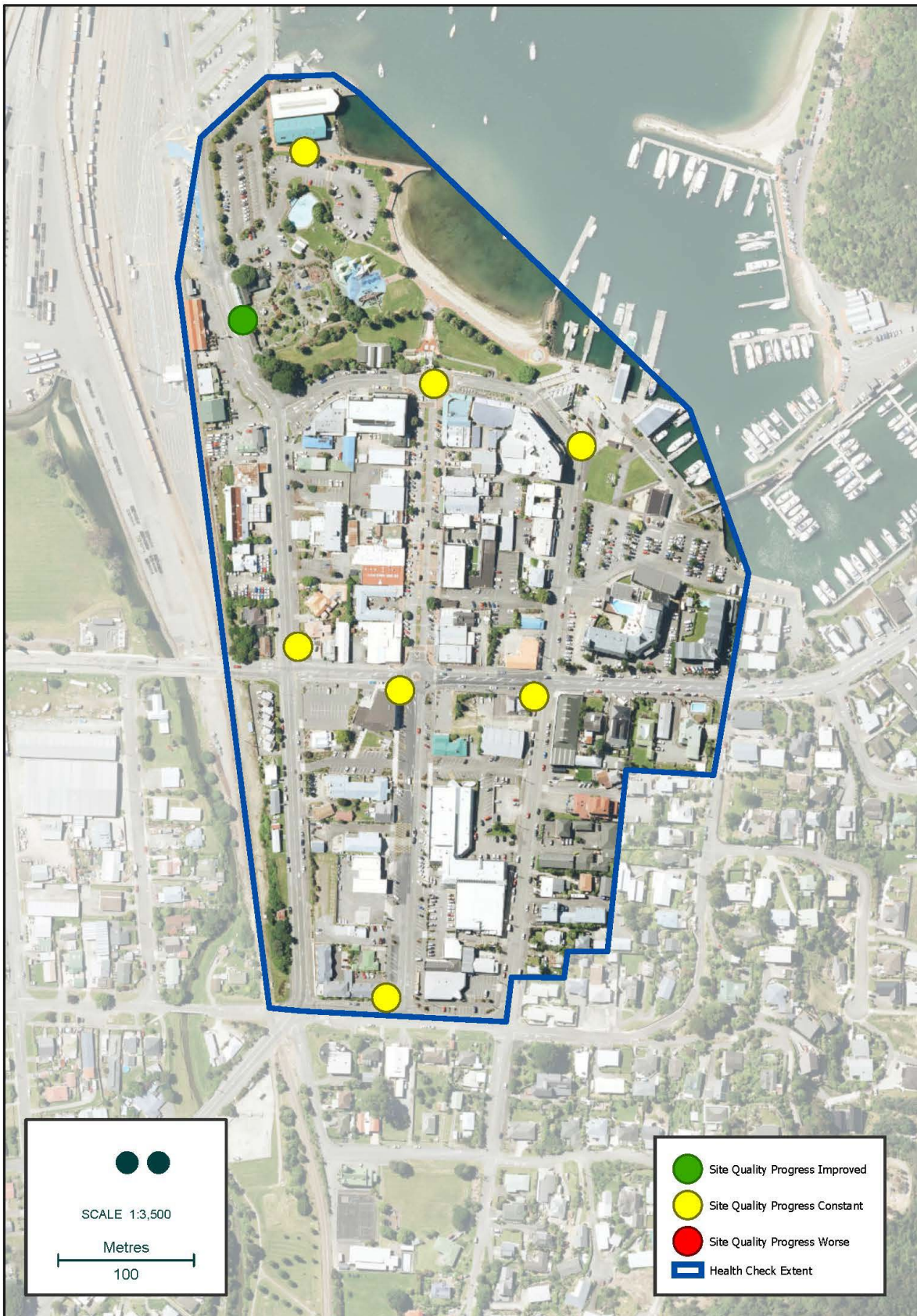


Appendix E: Picton CBD State of the Environment Map





Appendix F: Picton CBD State of the Environment Progress Map





Appendix G: Picton CBD State of the Environment Tables

13/12/21 12:45pm - 1:30pm	Air Quality	Noise Pollution	Clutter	Cleanliness	Visual Pollution	Adequate Seating	Adequate Shelter	Adequate Green Space	Pedestrian Safety	Directional Signage	Footpath Condition	Final Score	Conclusion 2020	Conclusion 2018	Conclusion 2016	Conclusion 2014
Outside the Aquarium	2	2	2	2	2	2	2	2	2	1	2	2	Good	Good	Good	Good
Outside the iSite building on Auckland Street	2	1	2	2	2	2	2	1	1	2	1	2	Average	Good	Good	Average
Intersection of London Quay and High Street	2	2	2	2	2	2	2	2	2	2	2	2	Good	Good	Good	Good
Intersection of London Quay and Wellington Street	2	2	2	2	2	2	2	2	2	2	2	2	Good	Good	Good	Good
Intersection of Auckland Street and Dublin Street	2	2	2	2	2	0	0	0	2	2	1	1	Average	Average	Average	Average
Intersection of Dublin Street and High Street	2	2	2	2	2	1	2	2	2	2	2	2	Good	Average	Bad	Average
Intersection of Waikawa Road and Wellington Street	2	1	2	1	2	0	0	0	1	2	1	1	Average	Average	Average	Bad
Intersection of Broadway and High Street	1	1	2	2	2	0	0	1	2	2	2	1	Average	Average	Average	Average

21/12/21 3 - 4pm	Air Quality	Noise Pollution	Clutter	Cleanliness	Visual Pollution	Adequate Seating	Adequate Shelter	Adequate Green Space	Pedestrian Safety	Directional Signage	Footpath Condition	Final Score	Conclusion 2020	Conclusion 2018	Conclusion 2016	Conclusion 2014
Outside the Aquarium	2	2	2	2	2	2	2	2	2	1	2	2	Good	Good	Good	Good
Outside the iSite building on Auckland Street	2	2	2	2	2	2	2	1	1	2	1	2	Average	Good	Good	Average
Intersection of London Quay and High Street	2	1	2	2	2	2	2	2	2	2	2	2	Good	Good	Good	Good
Intersection of London Quay and Wellington Street	2	2	2	2	2	2	2	2	2	2	2	2	Good	Good	Good	Good
Intersection of Auckland Street and Dublin Street	2	2	2	2	2	0	0	0	2	2	1	1	Average	Average	Average	Average
Intersection of Dublin Street and High Street	2	2	2	2	2	1	2	2	2	2	2	2	Good	Average	Bad	Average
Intersection of Waikawa Road and Wellington Street	1	1	2	1	2	0	0	0	1	2	1	1	Average	Average	Average	Bad
Intersection of Broadway and High Street	1	2	2	2	2	0	0	1	2	2	2	1	Average	Average	Average	Average

Appendix H: Picton CBD Street Vitality Map

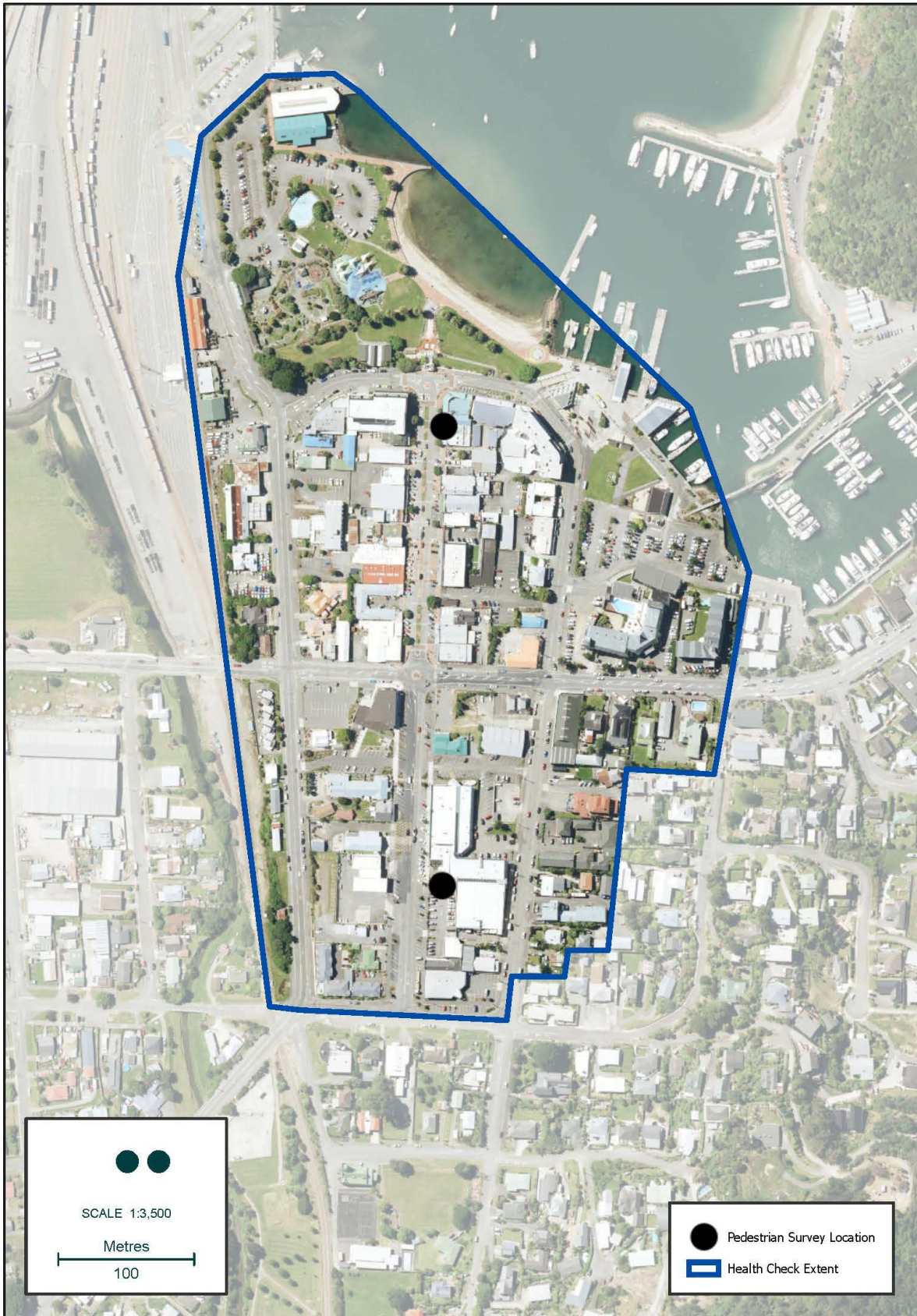


## Appendix I: Picton Pedestrian Survey

1. Are you taking this survey for Blenheim or Picton town centre?
2. Which part of Marlborough are you from?
3. What are the three most common reasons for you to come into Blenheim/Picton'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)
4. How do you travel most often to Blenheim/Picton's town centre?
  - Walk from home
  - Walk from work
  - Drive
  - Cycle
  - Bus
  - Mobility Scooter
  - Other (Please specify)
5. If you drive, where do you park most often in the Blenheim/Picton 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)
6. Do you find it easy to get around the Blenheim/Picton CBD? (Yes/No)
7. Please explain your response to the previous question. (Why/Why not)
8. What do you find the most attractive part of Blenheim/Picton CBD?
9. What do you find the least attractive part of Blenheim/Picton CBD?
10. How long would you spend per visit to Blenheim/Picton's town centre?
  - 15 minutes (or less)
  - 30 minutes
  - 1 hour
  - 2-3 hours
  - 3+ hours
11. How frequently do you visit to Blenheim/Picton CBD, excluding work?
  - Daily
  - Weekly
  - Monthly
12. Does Blenheim/Picton's town centre provide everything you need? (Yes/Most of the time/No)
  - Amenities
  - Services
  - Retail
  - Daytime hospitality
  - Evening hospitality
  - Social areas
  - Entertainment/Tourism
  - Carparking
13. Do you think Blenheim/Picton's town centre has improved over the last two years? (Yes/No)
14. What would you like to see more of in Blenheim/Picton's town centre?



Appendix J: Picton CBD Pedestrian Survey Points Map





Appendix K: Picton CBD Photo Survey Points Map

