BLENHEIM

Town Centre Health Check

DECEMBER 2021 – FEBRUARY 2022

MARLBOROUGH DISTRICT COUNCIL

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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

<u>Town Centre Health Check Conclusion 2022</u>

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.

<u>Purpose</u>

The 2021-22 Blenheim Town Centre Healthcare Check is a report in continuation from five previous checks in 2011, 2014, 2016, 2018, and 2020 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.

<u>Main Survey Findings</u>

Composition of the Town Centre

- Comparison (i.e., general retail) (25%), service (23%), and office (22%) type businesses dominate the Blenheim CBD.
- Vacant properties remain consistent at 5%, consisting of 19 units compared to 20 units in 2020.
- Comparison businesses have decreased from 98 units (2018) to 85 units (2022).

Transport Facilities

- The Blenheim CBD continues to offer sufficient parking spaces.
- Cycle facilities remained consistent with the previous check, with adequate services scattered evenly around the CBD.
- The Blenheim Bus service and Marlborough Taxis are still operating, helping residents get to their desired location.

Pedestrian Routes

- The quality of CBD pedestrian routes has remained consistent to routes measured in 2020, and observations saw four new high usage routes in 2021/22.

State of the Environment

- The surveyed locations have remained consistent with the 2020 health check.
- Only Scott Street and Market Street saw any changes, decreasing from a “good” state to an “average” state.

Vitality of the Town Centre

- The vitality of street edges/fronts were similar to previous checks.
- Central CBD streets performed stronger than buildings located on the east and west sides of the CBD.

Pedestrian Survey

- 342 responses for the Blenheim CBD, the most responses collected from any survey in the past.
- Number of pedestrians who drive to the CBD has increased from 75% in 2018, to 89% in 2022.
- 79% of respondents said the CBD is easy to navigate/move around in, due to its small and compact layout.
- 73% of respondents said the CBD had not improved over the last two years.

Blenheim CBD Spending

- Grocery & Liquor stores account for the largest money spent in the Blenheim CBD.
- 78% of people spending money in the Blenheim CBD during the period Jan21 – Dec 21 are from Marlborough.
- The Marlborough region has a positive net flow of $66M (Jan 21 – Dec 21).

Background and Methods

The 2021/22 Blenheim Town Centre Health Check is the sixth 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 2021/22 Blenheim 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 Town Centre Health Checks 2011, 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

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 Blenheim CBD, particularly when shown over the past 9 years. People are using the centre more often as a use for food and entertainment, whilst still seeking more from it in this regard. Pedestrians use the town centre less for typical consumer shopping and have reduced the duration and frequency of their visits over time.

These are the perceptions despite consistently moderate-to-improved transport facilities, street front vitality and state of the environment findings conducted longitudinally for Blenheim.

Blenheim Business Association (BBA)

The Blenheim Business Association is pleased to see the CBD is healthy in regard to its occupancy. Although the composition of the town centre is constantly changing, occupancy remains consistent which gives confidence, and is against the trend of other regional town centres. There has been positive movement towards investment in residential opportunities. A refresh of building facades would enhance the environment, making premises more inviting. The Marlborough Mile project, which is under construction, will further enhance the green spaces, giving visitors to the town centre another opportunity to engage in the area. The Blenheim Business Association is the advocacy group for the CBD who represent and support the local community.

Lynette Rayner
Blenheim Business Association Chairperson

key stats

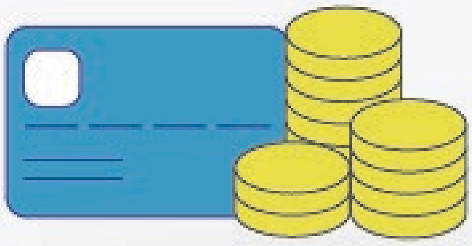
Comparison (general retail) businesses are **continuing to decrease** from

29% (98 units) in 2018 to **25%** (85 units) in 2022

Spent in Blenheim CBD from Jan 2021 to Dec 2021

$281.5M

Second-highest yearly period since 2016



Since **2011** street vitality along Queen St has **not improved**

32% of CBD vacancies are on Queen St

Marlborough District saw highs in

Money in visitors to Blenheim

Money out Malburians eslewhere

$189.6M **$123.5M**

and a median net flow of **66M** over the last **five years.**

Blenheim CBD Composition

Purpose

The composition of the Blenheim 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.

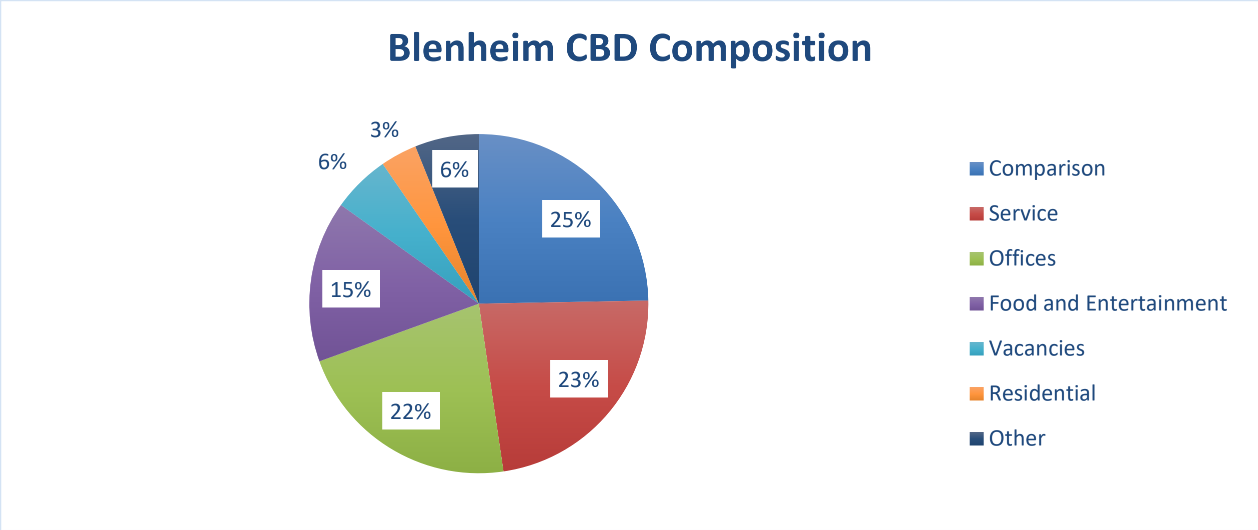


Figure 1. Pie graph showing the composition breakdown of different business categories in the Blenheim CBD.

Findings

The composition data collected clearly shows three business types that dominate the Blenheim CBD (Figure 1). Comparison, service, and office type businesses combine to make up 70% with 85 units, 79 units, and 75 units respectively within the town centre. This is to be expected as these business types consist of a variety of different businesses which provide necessity items to Blenheim residents. It is worth noting a significant amount of office business types were located on the first floor of buildings, meaning they were classified as N/A due to their entrance being on the ground floor. The percentage of office type businesses is likely to be higher given the number of first-floor buildings being classified as N/A.

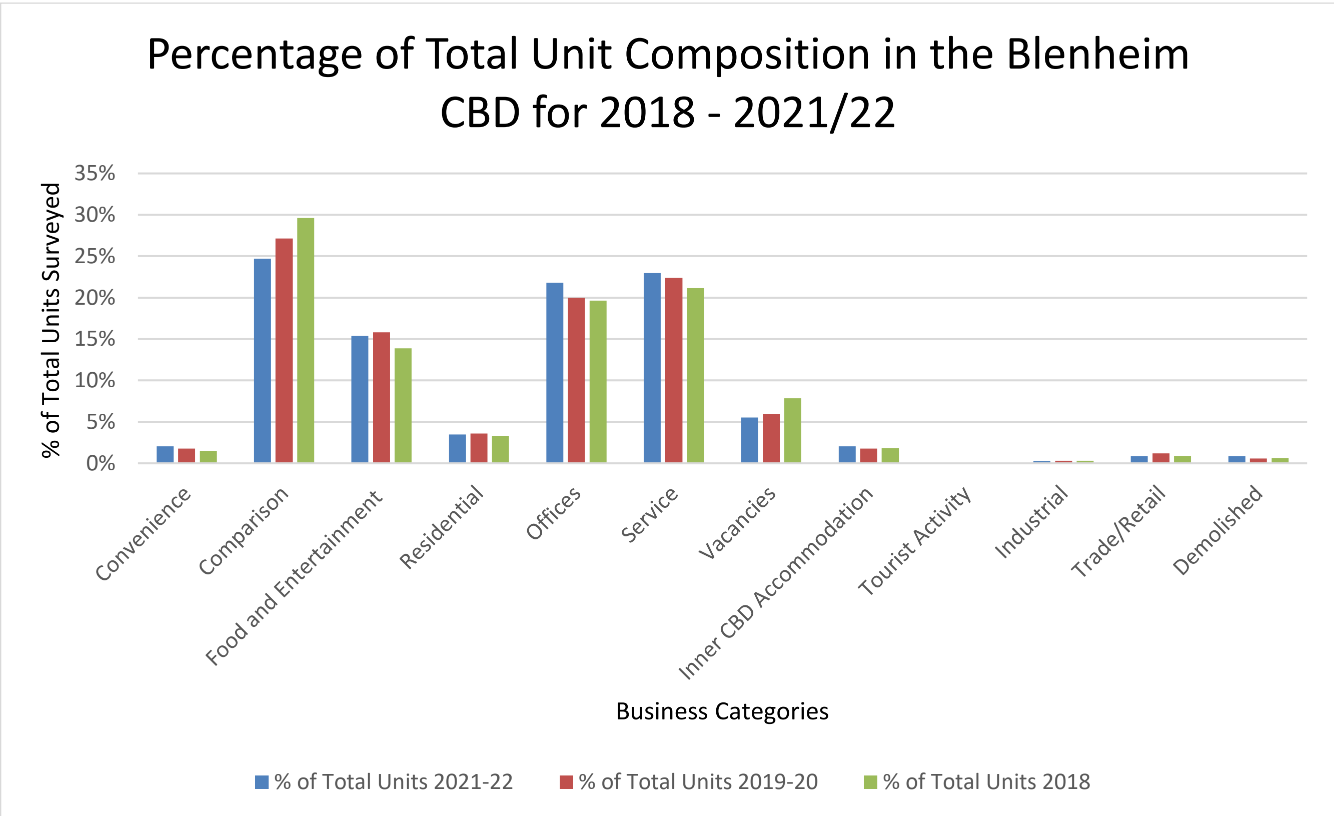


Figure 2. Graph identifying the trends between 2018 and 2021/22 for each business category.

Category	Number of Units 2021-22	% of Total Units 2021-22	Number of Units 2019-20	% of Total Units 2019-20	Number of Units 2018	% Of Total Units 2018
Convenience	7	2%	6	2%	5	2%
Comparison	85	25%	91	27%	98	29%
Food and Entertainment	53	15%	53	16%	46	14%
Residential	12	3%	12	4%	11	3%
Offices	75	22%	67	20%	65	20%
Service	79	23%	75	22%	70	21%
Vacancies	19	5%	20	6%	26	8%
Inner CBD Accommodation	7	2%	6	2%	6	2%
Tourist Activity	0	0%	0	0%	0	0%
Industrial	1	0%	1	0%	1	0%
Trade/Retail	3	1%	4	1%	3	1%
Demolished	3	1%	2	1%	2	1%
Total	344	100%	335	100%	331	100%

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

When comparing the 2021/22 data with previous health checks completed, the general spread of businesses in the Blenheim CBD is continuously changing. There is a consistent downwards trend in the percentage of comparison businesses in the town centre, going from 29% in 2018, to 27% in 2020, to 25% in 2021/22. COVID-19 has had a huge impact on consumer tendencies, driving online purchasing due to shop closures in-person. Although this health check was carried out under alert level 2/orange traffic light system, and in-person shopping was available, consumer behaviour has shifted online away from comparison type businesses. The number of vacancies is seeing a similar trend reducing from 26 units in 2018, to 20 units in 2020, to 19 units in 2021/22. This means more buildings are progressively being utilised, therefore, there is an increase in the general appeal of more buildings around the Blenheim CBD compared to health checks completed in previous years. Meanwhile, the number of units of food and entertainment, convenience, residential, and demolished categories are consistently fluctuating between a range of 2% over the last four/five years. Inner CBD Accommodation saw one more unit occupying CBD space in 2021/22 on Kinross Street. This suggests that more people from out of town are staying in the CBD, ultimately increasing both foot traffic and pedestrian interaction with businesses around the town centre.

It is important to note the walking composition survey was undertaken in December 2021, vacancies are slowly being filled over January and February 2022 – when the report is finalised and made available to the public. These vacancies are primarily looking to be filled with service and office type businesses.

There is potential for future retail/office developments in Westwood, located in Springlands which is not included in the Blenheim CBD map (Appendix A). It must be noted that the ‘big box’ Westwood development is attractive to larger-scale organisations/chains – which would improve the overall quality of Blenheim. This also provides an opportunity for businesses located within the CBD to “rejuvenate their shop appearances, to further entice customers”, said Lynette Rayner, BBA Chairperson. However, this potential development is taking its very first steps which will make an interesting talking point for the following Blenheim Town Centre Health Check, assuming this development goes ahead.

Transport Facilities

Parking

The Blenheim CBD offers a variety of parking with street parking, public carparks, and customer carparks widely available. According to the previous health check in 2020, Pay-by-Plate metered parking was introduced in 2019. Based on responses from the 2020 survey, 77% of people who regularly drove into town had used the system.

The responses received from this year's survey saw 89% regularly drive into the CBD. Of those who regularly drive, 29% use free street parking with a limited time, followed by 18% of respondents choosing to park in public carparks (such as Alfred St and Wynen St carparks). The Blenheim CBD adequately provides to pedestrians given the volume of parks, however, responses in the survey saw pedestrians wanting larger street parking in the central CBD streets.

Cycle Facilities

In terms of cycle lanes, cyclists have benefitted from these since they were introduced in 2016. However, after surveying 15 different locations in the Blenheim CBD, only 4 locations had cycle lanes. This raises concern for the safety of cyclists, and the potential question of whether to include more cycle lanes around the CBD. From the survey, only 1% of respondents cycle to the CBD, suggesting the cycling facilities already established in the CBD are adequately providing to the public. Introduced in 2014, there are 23 bicycle stands evenly distributed around the Blenheim CBD available to the public providing space for 162 individual bikes. Overall, the Blenheim CBD provides adequate facilities for both cyclists in general, and for those who cycle into the town centre.

Public Transport

The Blenheim Bus operates Monday to Friday from 9am – 3pm, and on Saturday from 9am – 1pm excluding public holidays. The Marlborough District Council operates a subsidised bus service in Blenheim. The fares for this service are $2, $1, and free for adults, school children, and SuperGold cardholders/children under 5 respectively. The north route operates 20 stops all over Springlands – Riversdale, starting from central Blenheim on Seymour Street (Countdown). The south route operates 22 stops all over Witherlea – Redwoodtown, again, starting in central Blenheim. These routes cover the majority of Blenheim and provide stops in a radius sufficient to cover most of the extended residential areas not included in the bus routes. There is also a Marlborough Taxi service available in the CBD with two taxi stands located on Market Street north (by Farmers) and on Seymour Street at the intersection of Seymour Street and Maxwell Road.

Pedestrian Route Quality

Purpose

Pedestrian routes with high pedestrian usage were observed via a walking survey to gain an understanding of whether popular routes were of a desired standard. The information gathered shows the stronger pedestrian routes within the CBD and provides a snapshot of routes that need 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

After comparing pedestrian routes within the Blenheim CBD with previous health checks, the conditions of these have not changed. There were four new popular routes added to the check via observation of pedestrians on central Market Street, a back-alley from the Alfred Street carpark towards High Street, underneath the forum between Market Street and Queen Street, and the zebra crossing at the intersection of Seymour Street and Maxwell Road. These pedestrian routes received a “good”, “average”, “good”, and “bad” rating respectively. Usual popular routes such as Seymour Square, the route by the Clubs of Marlborough, and the main zebra crossing on Maxwell Road continue to be given a “good” rating due to their wide, high-quality footpaths, vibrant lighting, and zebra crossings present. 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.

It is worth noting the poor quality of zebra crossings at the intersection of Maxwell Road and Seymour Street, and the intersection of Redwood Street and Main Street. 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. Further acknowledgement about the overall quality of pedestrian routes within the entirety of the Blenheim CBD should be considered. This raises the question of observing every route within the CBD as opposed to routes deemed of “high usage”. This allows an overall picture of the quality of routes within the CBD and mitigates the impact of frequently used back-alley shortcuts by locals as a route into town, as they are continuously given a “poor” rating.

State of the Environment

Purpose

The sole purpose of measuring the state of the Blenheim 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 the comparison to previous measures to gain insight on how the Blenheim 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

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 CBD were surveyed twice on the following dates and times: (3 – 4:30pm on 30/11/21, and 11am – 12:30pm on 02/12/21).

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.

Findings

After comparing the results (Appendix G) with previous years, the general conclusion shows the state of the environment in the Blenheim CBD has remained consistent. Both locations on Scott Street and Market Street were scored lower compared to the previous check going from "good" to "average", whereas all other locations remained at the same quality. These findings are promising to the Blenheim CBD environment, however, there is still room for further improvement at most of the surveyed locations. It is worth noting that only four locations had cycle lanes (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).

In the previous health check report, it was noted that introducing a "great" level of quality for locations like Queen Street (Liz Davidson Place) would show the distinction between excellently maintained locations within the CBD and well-maintained locations. During this check, the Riverbank area on Symons Street, the Forum at Market Place, and Liz Davidson Place were among excellently maintained locations and may deserve a higher category in future checks should their high level of quality stay unchanged in the future.

State of the Environment

Overall averages

- Air Quality: 2
- Noise Pollution: 2
- Clutter: 2
- Cleanliness: 2
- Visual Pollution: 2
- Adequate Seating: 1
- Adequate Shelter: 1
- Adequate Green Space: 1
- Pedestrian Safety: 2
- Directional Signage: 2
- Footpath Condition: 2
- Cycle Lanes: 2

Street Vitality

Purpose

The purpose of gathering information on street vitality is to analyse the overall attractiveness, activeness, and general appeal of the Blenheim 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 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

After comparison, there were similarities in the overall quality of CBD building fronts. Central CBD streets including Scott Street, Market Street, and Maxwell Road possessed the strongest levels of vitality given the large quantity of cafes/restaurants and high-end retail shops. The number of outdoor seating areas, and open-plan fronts with large glass windows contributed to their higher rating. Meanwhile, the remainder of building fronts were much the same with a large quantity of "very weak" ratings on the east side of the CBD. The number of demolished/vacant buildings within the CBD did not help the overall vitality, especially on Queen Street. 32% of vacancies in the Blenheim CBD are on Queen Street, which is responsible for its unlively feel. The Blenheim Health Hub, located centrally on Queen Street occupies a large amount of space, and received a "weak" rating due to its dark, blurred out windows along the face of the street. Many building fronts showed potential, however, smaller sized windows due to smaller buildings contributed to the street edges falling in the "very weak" category.

Pedestrian Survey

Purpose

The pedestrian survey is designed to gather a collective view of how the Blenheim 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 Blenheim 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, 342 of which were on the Blenheim CBD. In comparison, this was far more than previous checks, receiving 150, 135, 90, and 286 responses in 2014, 2016, 2018, and 2020 respectively.

Findings

Composition of Blenheim Pedestrian Survey

The majority of respondents in the survey were from Blenheim Central, followed by Springlands, Redwoodtown, Witherlea, and Renwick as the main contributing areas. The top locations people visited the town were from Blenheim Central (33%), Springlands (12%), Redwoodtown (10%), Witherlea (8%), and Renwick (4%). Compared to the previous survey, there were a lot more responses from Blenheim Central (27%), however, respondents may have selected Blenheim instead of their particular suburb in Blenheim.

Reasons for Visiting the Blenheim CBD

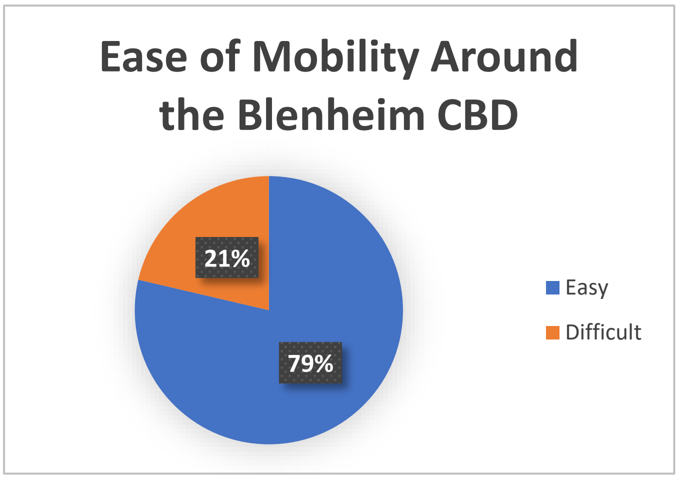
According to the 2020 survey results, non-food shopping was the most popular reason for visiting the CBD, followed by visiting cafes/restaurants. With the large decrease in general retail businesses in the CBD, visiting cafes/restaurants (20%) is now the most popular reason for visiting the town centre followed by non-food shopping (19%). Although the number of food and entertainment business in the CBD has remained the same since the previous health check, the continuous decline in comparison businesses is the driving force for less visits to general retail stores. Entertainment/leisure continues to be the least popular reason for visiting the CBD at 4% of responses.

Travelling to the Blenheim CBD

Driving to the CBD is still by far the most popular method of travel (89%). This is likely due to reasonably low traffic levels, and easily accessible convenience. The percentage of people entering the CBD via car has increased from 75% in 2018, to 84% in 2020, to 89% in 2022 – a major increase. This may be due to a rise of online responses from the suburbs, however, a 14% increase in traffic presence over the last 4 years is significant.

The 2020 survey results showed the most popular parking location was customer carparks (such as Countdown/Warehouse carparks), followed by metered carparks. Given the introduction of the pay-by-plate system in 2019 that includes the first hour free, these options aren't as popular in 2022. The most popular parking locations were free street parking with a limited time at 29%, followed by public carparks (such as the Alfred St and Wynen St carparks) at 18%. People are choosing to park street side more and more. This may be slightly skewed with the respondents who work in the CBD, however, 29% is clearly the most popular location of parking with the survey results.

Ease of Access



In terms of mobility around the Blenheim CBD, 79% of respondents say it is easy rather than difficult due to its small, compact layout – which is consistent with the previous survey findings. The respondents who were on the other side of the fence stated congestion, narrow streets, poor footpath conditions and raised speed bumps as reasons for difficult mobility. In comparison to the previous survey completed, 78% of respondents said the CBD was easy to move/navigate around, which is similar to this year's responses.

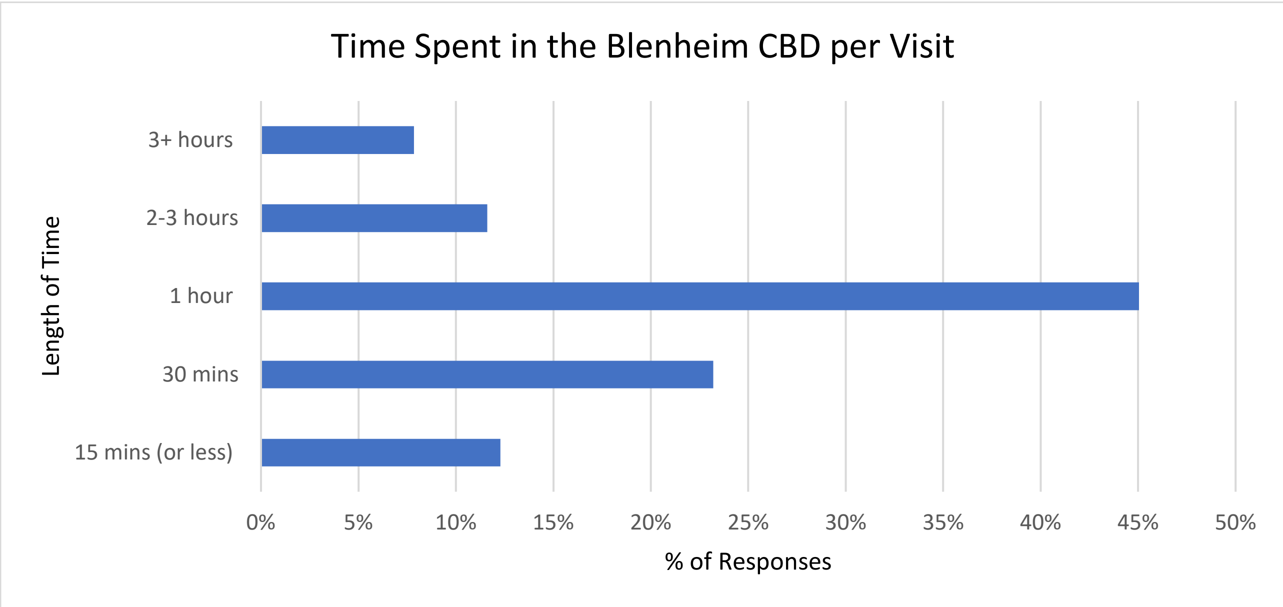
Attractive and Unattractive Aspects

To ensure consistency with the previous health check, this question was left open-ended for respondents to answer with their thoughts and ideas. The forum area, Seymour Square, green spaces (including gardens, trees, and appropriate lighting), and the choices of cafes were among the most frequent answers to the more attractive areas in the CBD. Other less frequent answers included the Taylor River area, Bythell Place seating area, and vitality on Market Street as other attractive areas.

In terms of the less attractive areas of town, the most frequent answers included vacant, “dull shops” – specifically on Queen Street, the out-dated faded blue light posts, poor quality footpaths, and the poor quality of public toilets. There were further comments made on the number of roundabouts with dead plantation, specifically at the intersection of Redwood Street and Main Street.

Time Spent in the CBD

The average amount of time pedestrians spend in the CBD is roughly 1 hour (45%). Since 2016, this statistic has continuously varied, though has remained the most popular answer. In 2016, 50% of pedestrians would spend 1 hour in the CBD, 52% in 2018, 48% in 2020, and 45% this year.



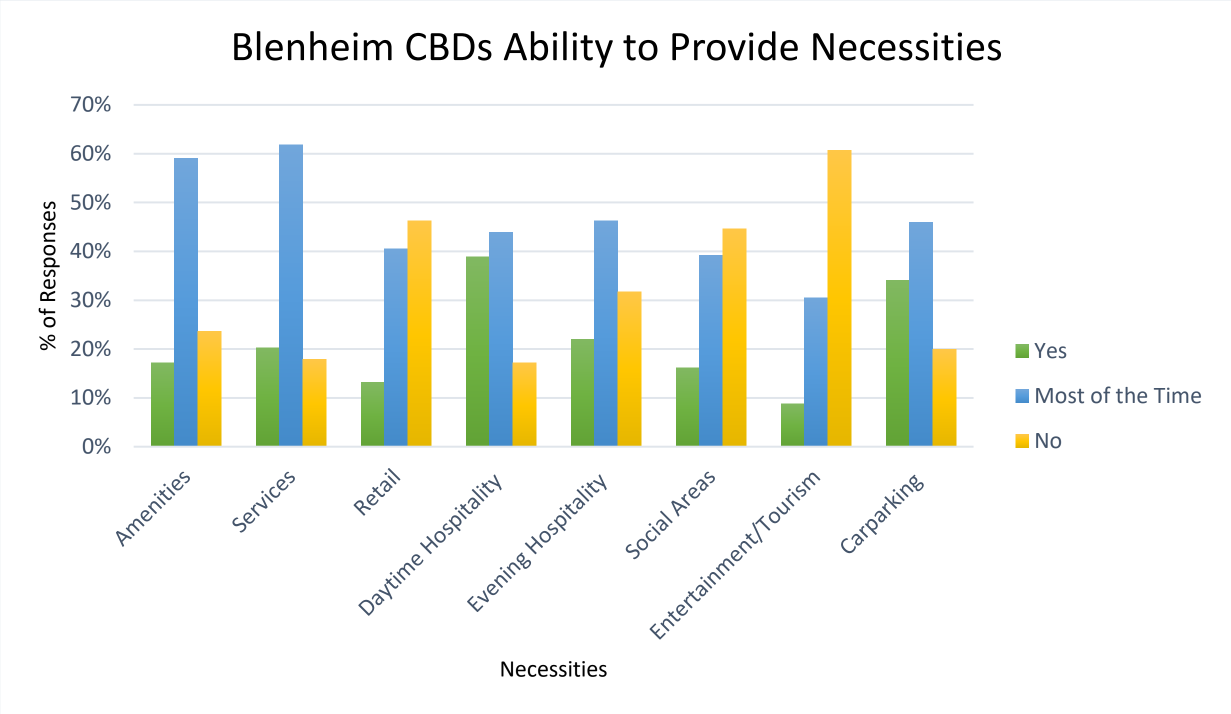
A comment made in the 2020 report said the combined proportion of pedestrians who spent 30 mins or less (including 15 mins or less category) more than doubled from 13% in 2018 to 29% in 2020 – suggesting people are visiting the CBD to do what they must and then immediately leaving again. In 2022, this combined proportion has further increased to 35%, ultimately supporting this comment and the frequency of this happening.

Frequency of Visiting the CBD

Similar to time spent in the CBD, the percentage of people coming into the CBD on a weekly basis has further decreased, though is still the most popular answer. In 2016, 75% of respondents would visit weekly, which decreased to 67% in 2020, and has further decreased to 64% in 2022. Daily visitors responses has remained at 12% since 2016, and monthly visitors has increased from 21% to 24% since 2020.

There are gaps in past survey responses regarding the 2018 data, hence why this dataset is being compared to the 2020 and 2016 results. It was stated in the 2020 report that the 2018 data dramatically differs to both the 2016 and 2020 data, so it was assumed there was an error due to a smaller sample size.

Blenheim CBDs Ability to Provide What is Needed



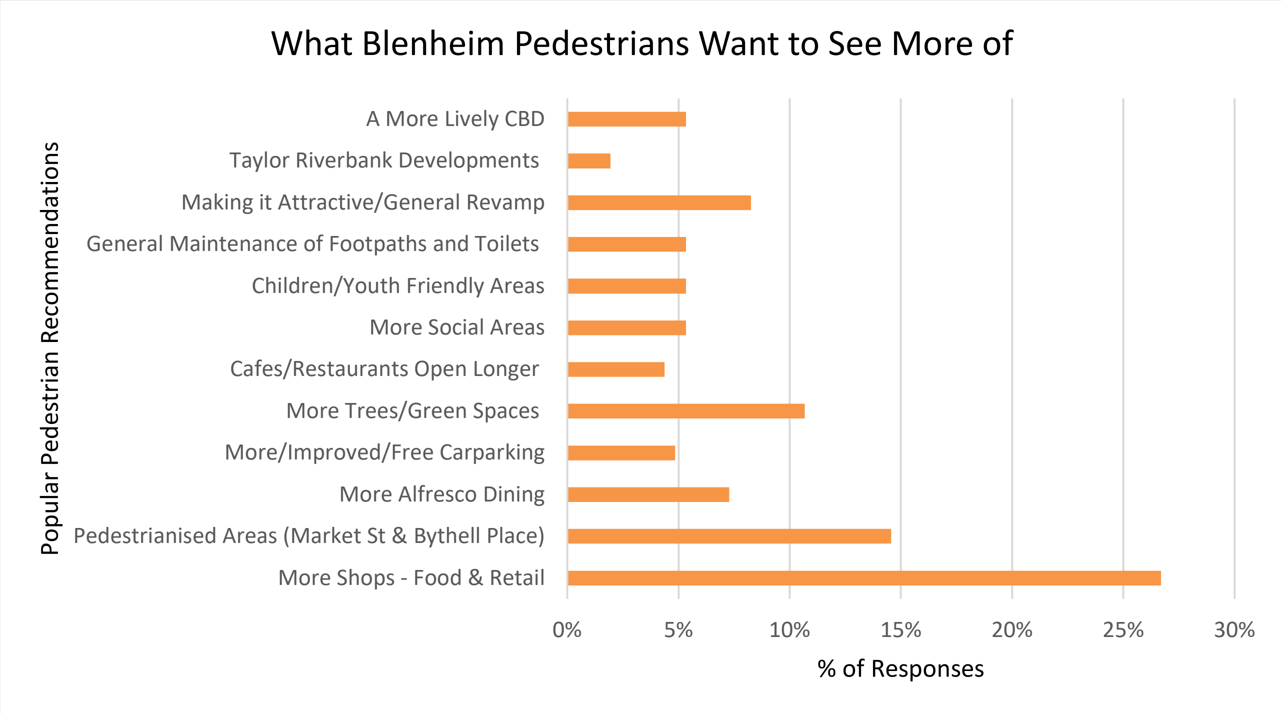
Regardless of change over time, gaining public view on whether or not the town can provide necessities is important information. People were very happy with daytime hospitality and carparking, and reasonably happy with amenities, services, and evening hospitality. However, the majority of respondents deemed retail, social areas, and entertainment/tourism as necessities the Blenheim CBD fails to adequately provide. In comparison to 2020, entertainment/tourism was the only category overwhelmingly rejected by Blenheim pedestrians to provide to their needs – suggesting that social area and retail categories have gotten worse in terms of pedestrian satisfaction.

Overall however, with the number of most of the time responses, the Blenheim CBD adequately provides necessities to the Marlborough community, with a few categories needing improvements. Daytime hospitality was the sole category that improved in the minds of pedestrians, with the percentage of "yes" votes increasing from 32% in 2020, to 39% in 2022.

Improvement

When asked if pedestrians thought the Blenheim CBD had improved over the last 2 years, 73% said no. It is important to note this question does not ask why people answered the way they did and a proportion of "no" responses may represent people being neutral on the matter, however, only 56% of respondents said the CBD had not improved in 2020. This increase of negative responses is slightly alarming for the Blenheim CBD and could affect future usage and interaction. Present in the survey results were a few statements made that can be used to provide little justification to these answers – including, 'the town is doesn't match the regions style', 'even the smallest villages in France feel more alive than Blenheim', 'the Taylor River could be celebrated more', and 'the CBD looks a bit dreary'.

Recommendations



The final question of the survey was left open-ended, prompting respondents to state what they wanted to see more of in the CBD. This graph represents the most frequent responses among all, where other responses not as frequent were left out. More shops (food and retail) which included filling vacancies was the most frequent response at 27%, collecting 55 responses. Following this was pedestrianised areas, namely Market Street and Bythell Place as the prime locations for this at 15%, collecting 30 responses. The 2020 survey results saw more shops and pedestrianised areas as the top two recommendations, equally collecting 45 responses each. Pedestrians are wanting diverse eating options, and an increase in both smaller business options, as well as high end retail options.

Other popular responses included more trees/green spaces, more alfresco dining options, particularly along Market St, a general revamp and/or making areas look more attractive - which was mainly focused on the outdated blue light posts and the older looking buildings, and more children/youth entertainment/areas.

Pedestrians wanting more retail shops complements the identified composition findings, showing a continuous decreasing trend of comparison type businesses. Few comments were made on the potential threat of Westwood as a location for commonly used comparison shops, which may influence this negative trend in the future. Although cafes/restaurants extending their opening hours was not as frequent as other responses, there is a link to more cafes, as well as this recommendation having a positive influence on pedestrian motivation to visit the CBD after work hours more often, spending more money. The number of ‘a livelier CBD’ responses also relate to this theme, ultimately providing an enticing atmosphere for pedestrians.

Blenheim CBD Spending

Purpose

This is a new and informative segment to the Blenheim 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 Blenheim CBD and conclusions can be drawn about the overall financial state of the town centre. It must be stated that this only accounts for card transactions and isn't a complete representation of cash flows in Marlborough. Furthermore, it is important to note that the Blenheim CBD area parameters followed in this report are different to the area parameters on Market View, however, do cover much of this reports area.

Findings

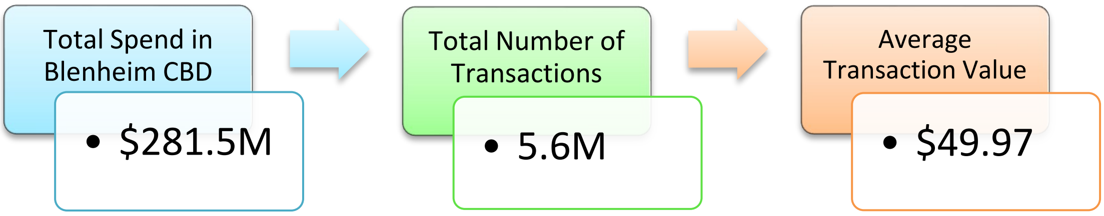


Figure 3. Overview of period Jan 20 – Dec 21.

In the Blenheim CBD during the period Jan 21 – Dec 21, $281.5M was spent over 5,633,215 transactions, averaging $49.97 per transaction. In comparison, during the period Jan 20 – Dec 20, $269M was spent over 5,319,021 transactions, averaging $50.58 per transaction. Total money spent in the Blenheim CBD increased by 4.6%, the number of transactions increased by 5.9%, however, the average amount of money per transaction decreased by 1.2%. The total spend by the entirety of Blenheim was $544.2M over 10,464,246 transactions, meaning the CBD spend during Jan 21 – Dec 21 covered over half of Blenheim's spending in the same time frame. This is to be expected given the CBD accounts for the large majority of shops in Blenheim, providing necessities to Blenheim residents.

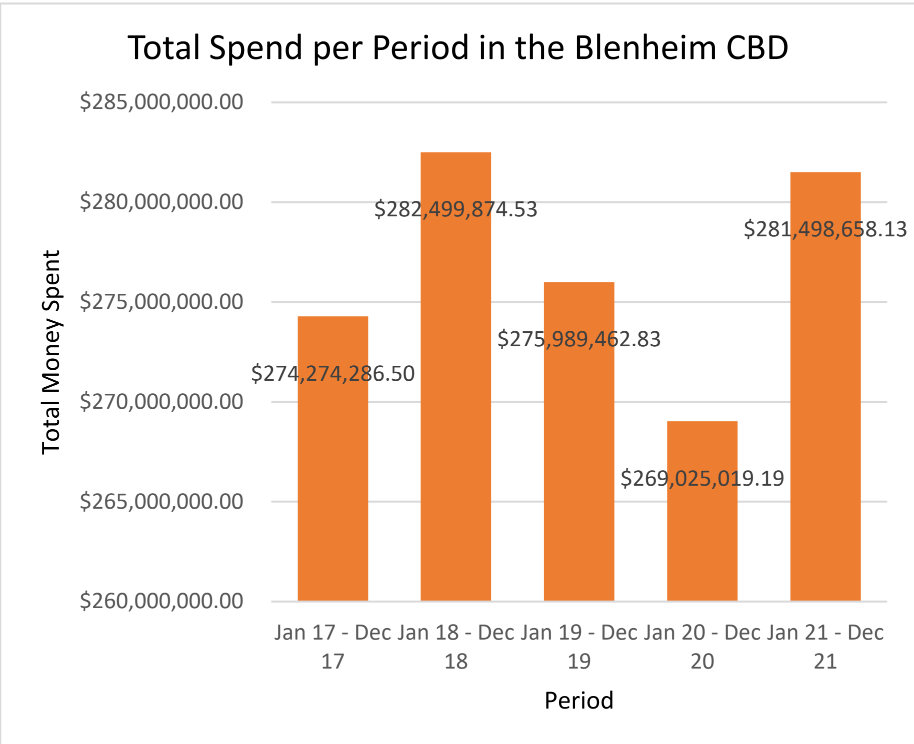


Figure 4. Graph showing the total spend per yearly period in the Blenheim CBD.

Figure 4 shows the period Jan 18 - Dec 18 as the period with the most money spent in the Blenheim CBD via a card transaction. The overall trend is reasonably consistent, however, period Jan 20 – Dec 20 saw less money being spent. This is due to COVID-19 and its effects which is explained more further down the report (page 22). Overall, the money spent in period Jan 21 – Dec 21 has been one of the highest in recent years during the response and recovery phases post COVID -19 in New Zealand.

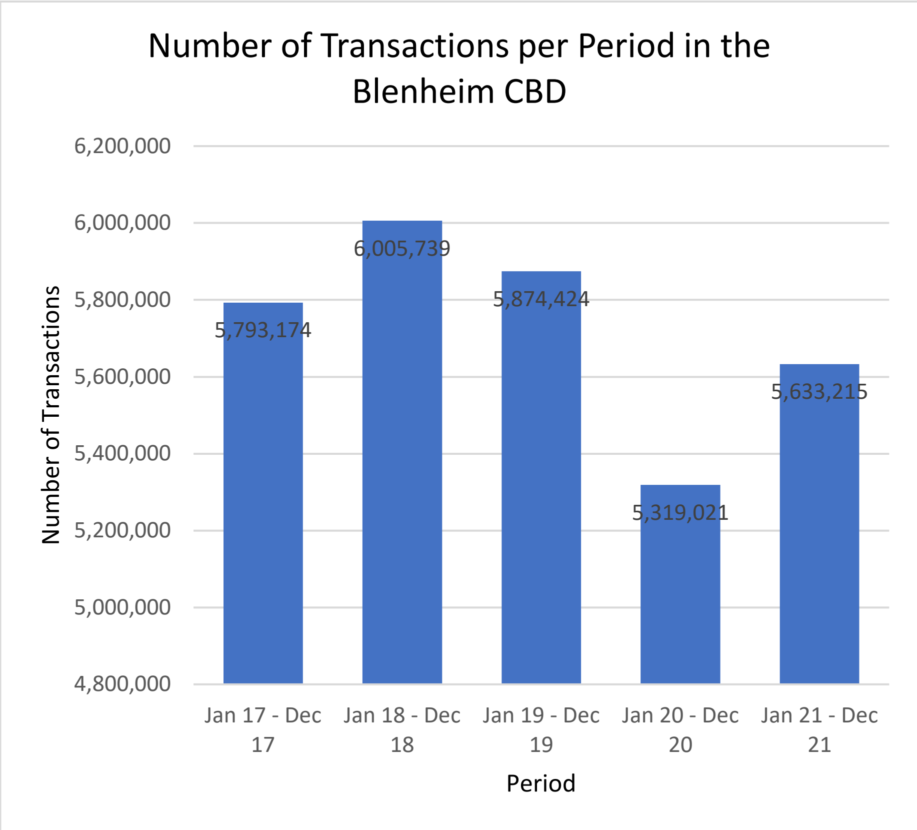


Figure 5. Graph showing the number of transactions per yearly period in the Blenheim CBD.

Figure 5 shows much the same as figure 4. Periods Jan 18 – Dec 18 and Jan 19 – Dec 19 had the most transactions, both well into 5.8M. It is interesting to see how period Jan 21 – Dec 21 was extremely high in money spent whilst having far less transactions compared to period Jan 18 – Dec 18 having roughly $1M higher spending value, and roughly 372,000 more transactions. COVID-19 restrictions reflect in period Jan 20 – Dec 20, as we see a low of 5.3M transactions in the last 5 years. The overall trend matches figure 4 in an increase – decrease – increase fashion.

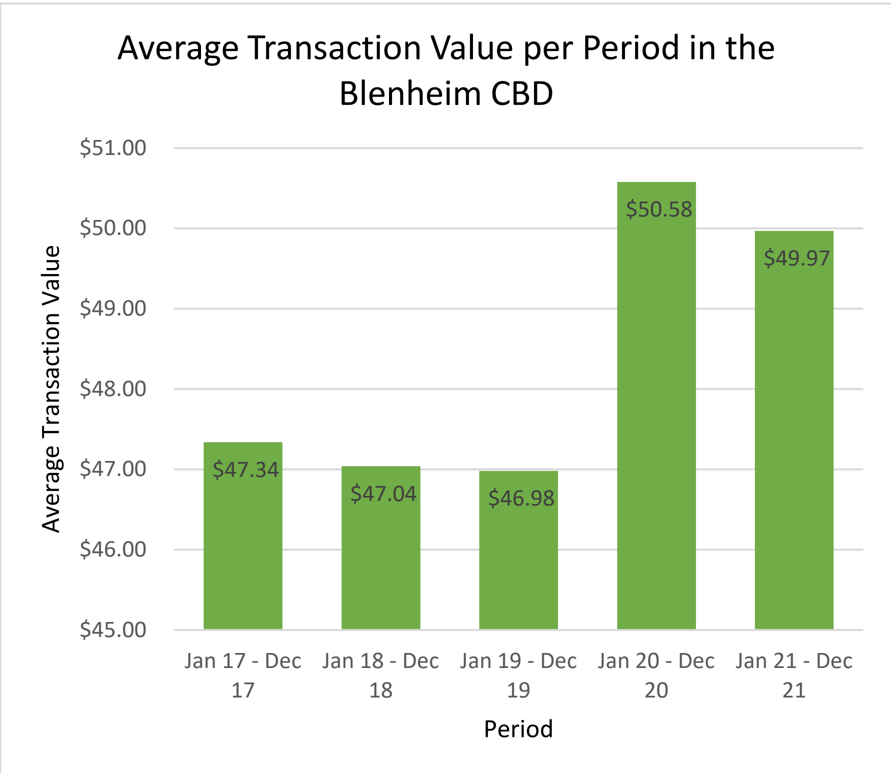


Figure 6. Graph showing the average transaction value per yearly period in the Blenheim CBD.

Figure 6 provides information on Blenheim resident tendencies; more specifically how much is spent on average. Period Jan 20 – Dec 20 immediately stands out with the highest average transaction value. Given the state of the external environment during COVID-19, Blenheim residents couldn't visit town often due to restrictions and were spending more money at a time when visiting the CBD. Periods starting Jan 17 through end Dec 19 transactions were consistent around $47.

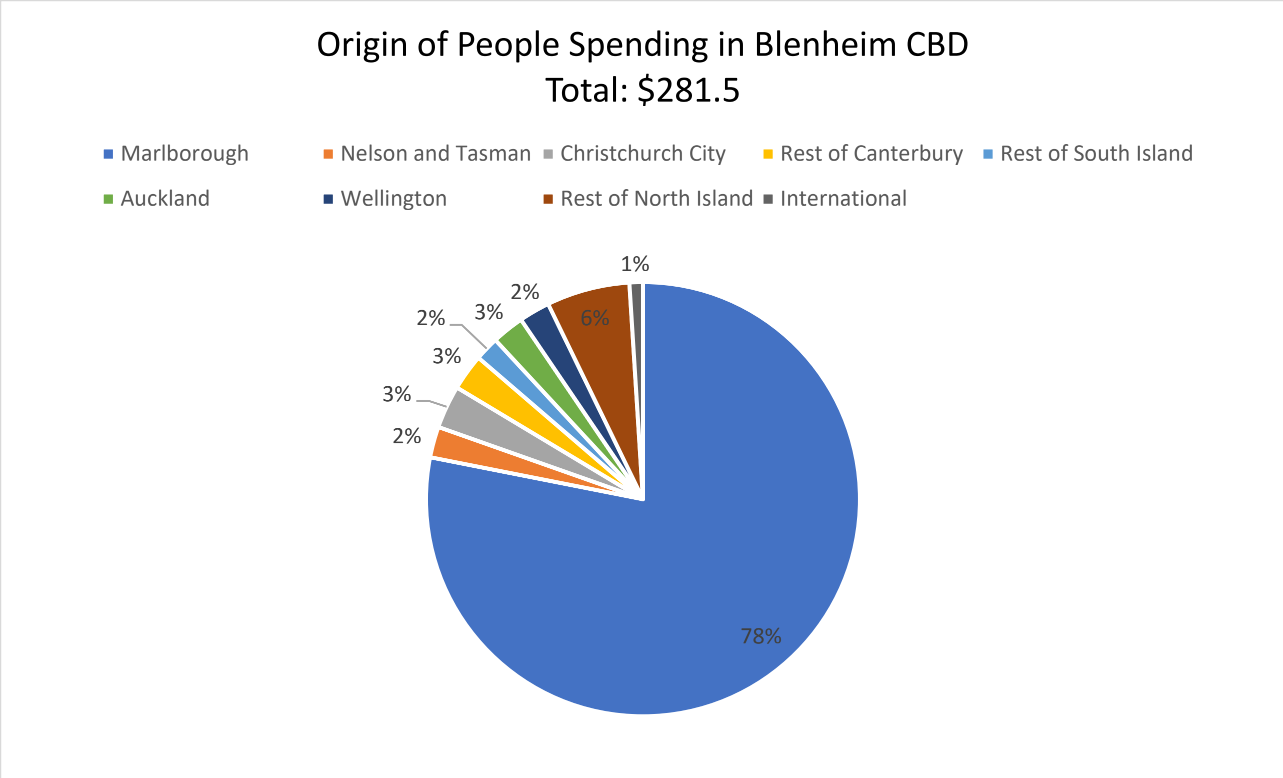


Figure 7. Pie Graph showing the origin of people who spend in the Blenheim CBD

It comes as no surprise seeing 78% ($219.8M) of spenders are from Marlborough, however, the next biggest contributor, contributing 6.2% ($17.6M), is the North Island excluding Auckland and Wellington. This is an interesting statistic given the COVID-19 regulations from August - October 2021, keeping most of the upper North Island in lockdown levels 3 and 4. 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. The Blenheim CBD was responsible for a significant 38.4% share of the Marlborough Districts transactions (including Blenheim CBD, rest of Blenheim, Picton, Renwick, North Marlborough, and South Marlborough).

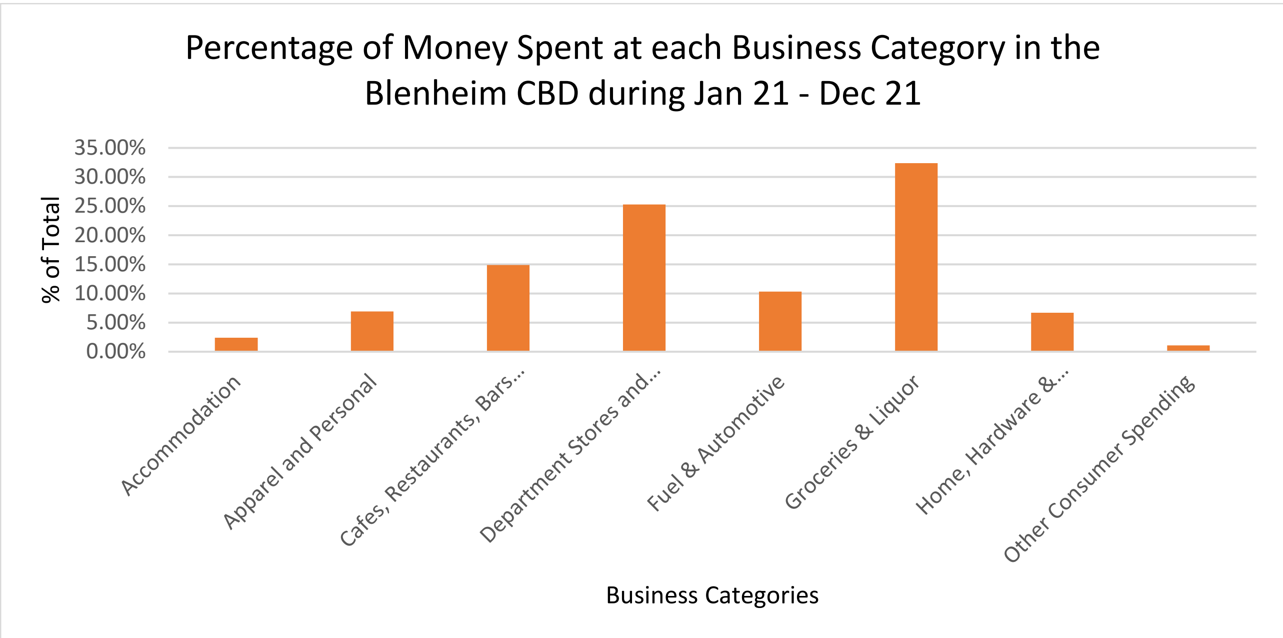


Figure 8. Graph showing the distribution of money per business category in the Blenheim CBD.

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

Figure 8 shows both department stores & leisure, and groceries & liquor combining for 57.7% of the total spend in the Blenheim CBD. Specifically, groceries & liquor accounting for $91.2M during this period, while department stores & leisure accounts for $71.3M. During this period, COVID-19 placed limitations on the availability of certain business categories. Businesses who are operating under alert level 3 are faced with capacity limitations and are often substituted with online shopping by consumers. Regardless of the COVID-19 alert level, supermarkets are deemed essential businesses and operate as close to usual as possible. It is to be expected that grocery and liquor stores lead this statistic, as both are necessity items within Blenheim. The café, restaurant, bar, and takeaway category is noticeably high, given that this category represents 15% of the Blenheim CBD composition (Table 1). The apparel and personal category (covering clothing, footwear, jewellery, and beauty services) is remarkably low given that comparison type businesses represent 25% of the Blenheim CBD composition (Table 1), which suggests the power of e-commerce and online shopping as a popular purchasing method for this category.

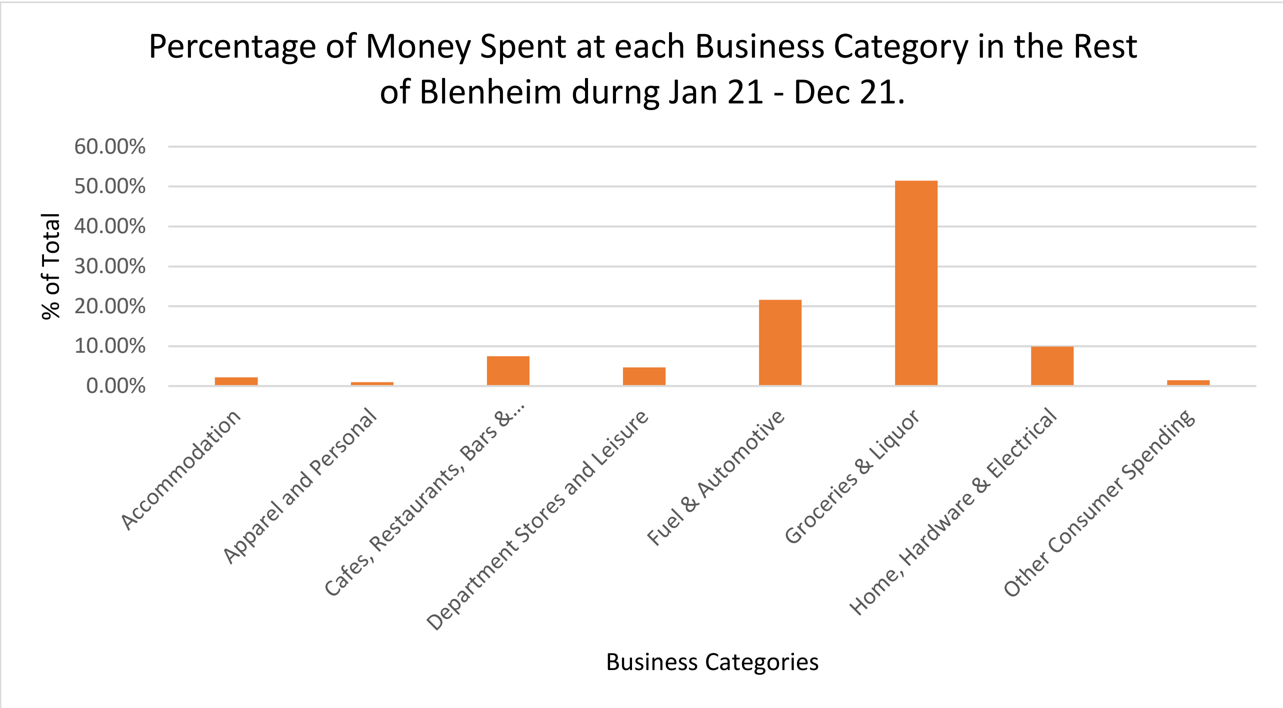


Figure 9. Graph showing the distribution of money per business category in the Blenheim CBD.

Figure 9 shows similar results regarding grocery and liquor stores leading this statistic, accounting for 51.5% alone. Justification to this statistic is clear as Countdown Redwoodtown, Countdown Springlands, and Pak'nSave are located out of the Blenheim CBD map (Appendix A) and are of convenience to residents living in and around these areas. Evidently, both department stores & leisure, and cafes, restaurants, bars, and takeaways categories have significantly decreased due to their central positioning in the Blenheim CBD, suggesting the frequency of café, restaurant, bar, and takeaway visits outside of the CBD may be for gatherings of importance, on special occasions. The increase of fuel & automotive businesses compared to the spending in the Blenheim CBD is logical, with only 2 petrol stations located in the Blenheim CBD. It is safe to assume that most payments made at petrol stations and automotive repair shops are frequent and are above the average transaction value (Figure 3).

Figure 10. Marlborough District Cash Flows for Jan 21 – Dec 21.

Market View was unable to produce a cash flow overview for the Blenheim CBD alone, however, it is relevant to look at the overall flows in the Marlborough District. From Figure 10, the Marlborough District possesses a positive net flow of $66M, which is a healthy figure for the district. After comparing to the previous period (Jan 20 – Dec 20), money in increased by 12.3%, money out increased by 19.9%, and the net flow increased by 0.3%. This reflects the nationwide COVID-19 lockdown which commenced on the 25th of March 2020 under alert level 4 for a minimum of 4 weeks. On the 27th of April 2020, New Zealand moved into alert level 3, and further into alert level 2 on the 14th of May 2020. On the 9th of June 2020, New Zealand moved into alert level 1 and businesses started to resume business as usual. This froze major spending in New Zealand and is clear by a 12.3% increase in money coming in during the period following the COVID-19 affected period (Jan 20 – Dec 20).

Marlborough District Domestic Flows			
	Money In	Money Out	Net Flow
Jan 20 - Dec 20	$168.9M	$103.1M	$65.8M
Jan 19 - Dec 19	$180.4M	$105.5M	$74.9M
Jan 18 - Dec 18	$175.6M	$108.4M	$67.2M
Jan 17 - Dec 17	$163.0M	$100.5M	$62.5M

Table 2. Table showing Marlborough District Domestic Flows from 2017 – 2021.

From this table, we can conclude the trend increases from Jan 17 – Dec 17 over the next two, yearly periods to Jan 19 – Dec 19. Jan 20 – Dec 20 saw a small decrease across all categories; however, the Marlborough District was still producing healthier figures than the period Jan 17 – Dec 17. Finally, the most recent period saw significant increases in both money in (+12.3%) and money out (+19.9%) resulting in a $66M net flow, a median net flow since 2017.

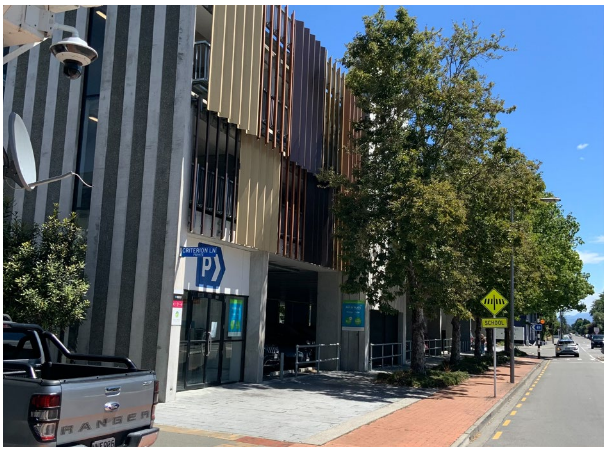
Side-by-Side Comparisons

Queen Street 2009 vs 2022

Other areas 2009 vs 2022

Main Street 2009

Corner of High Street and Symons Street 2009



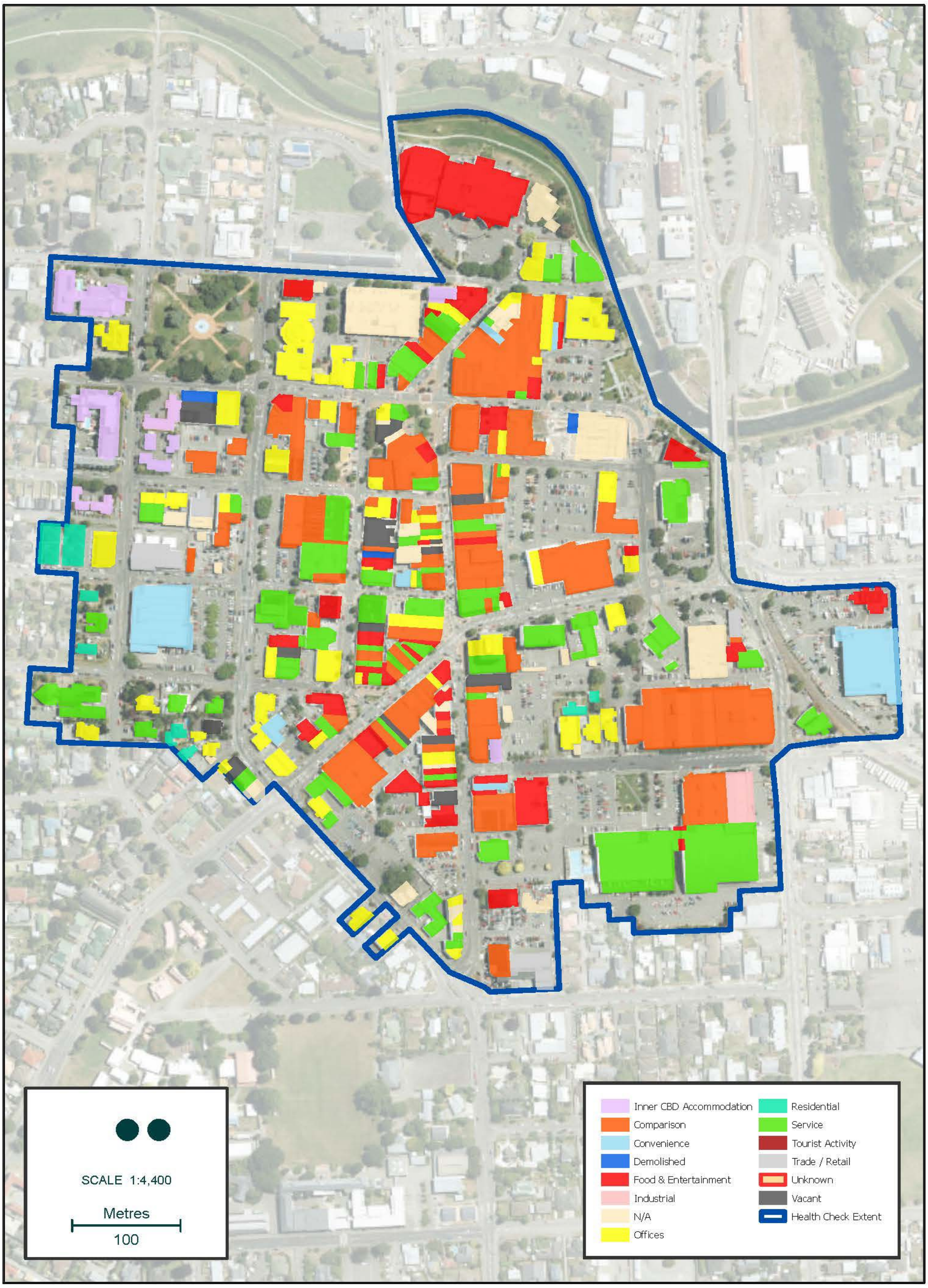
Alfred Street 2009

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

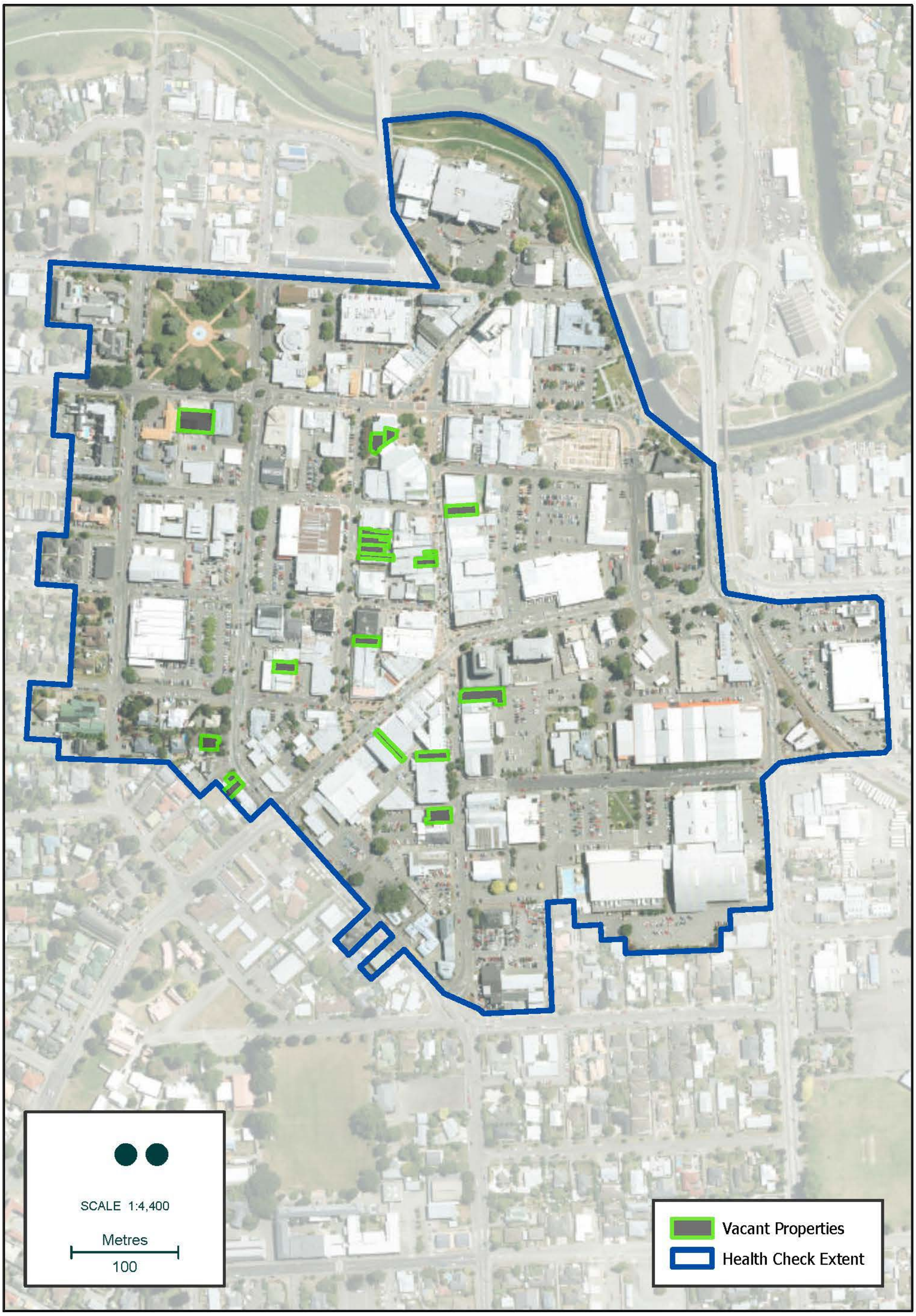
Appendices

Appendix A: Blenheim CBD Map

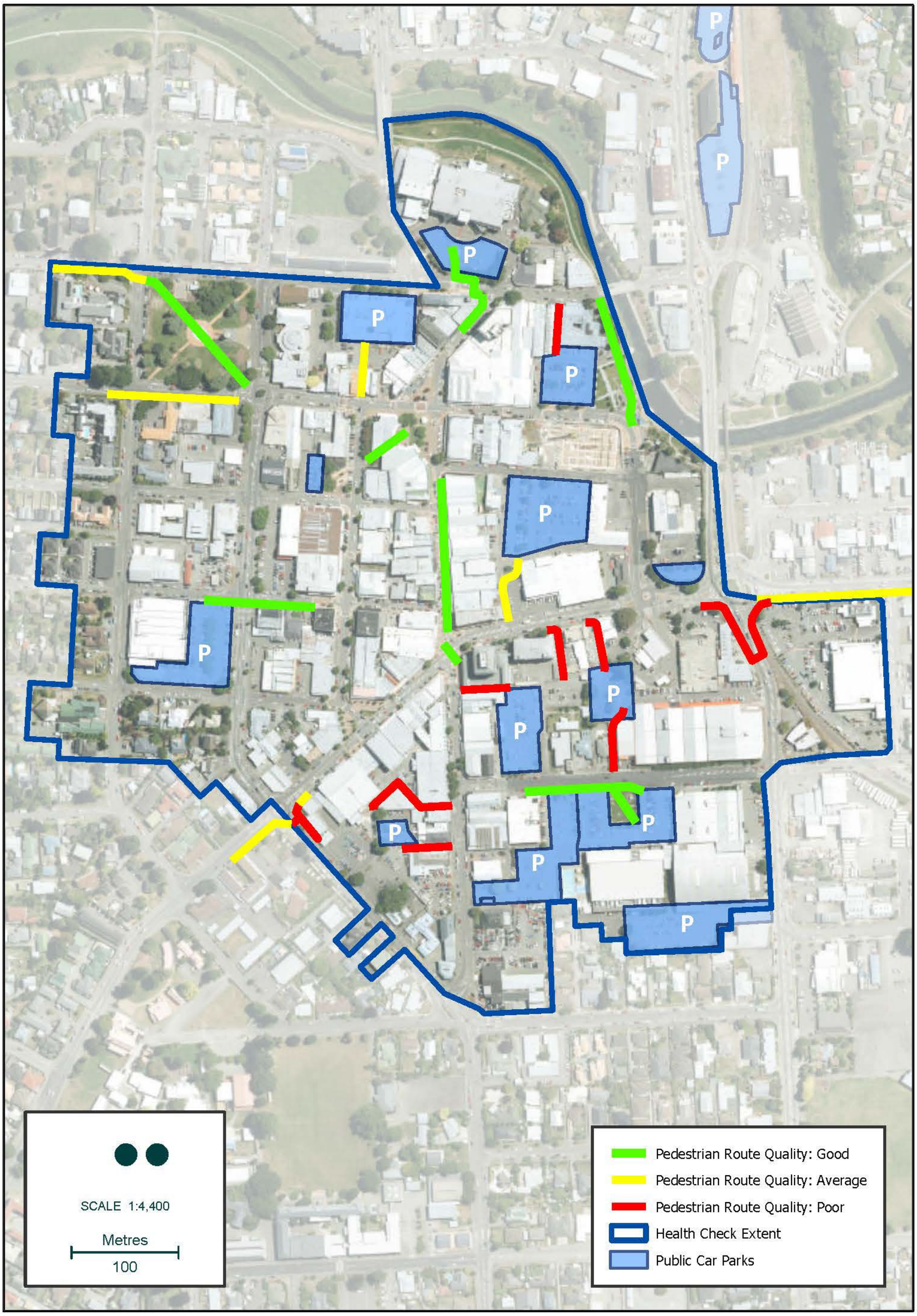
Appendix B: Blenheim CBD Composition Map



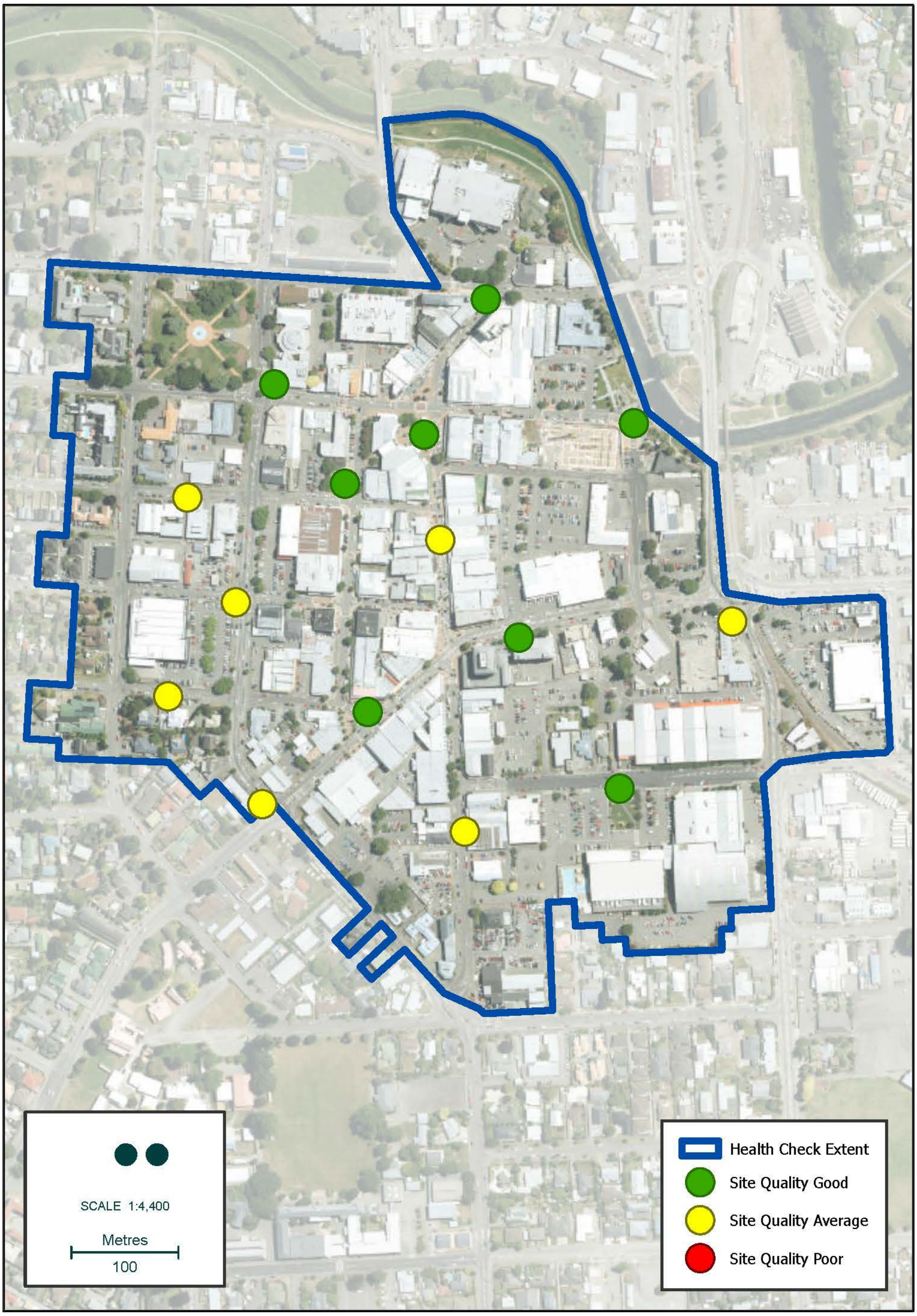
Appendix C: Blenheim CBD Vacant Properties Map



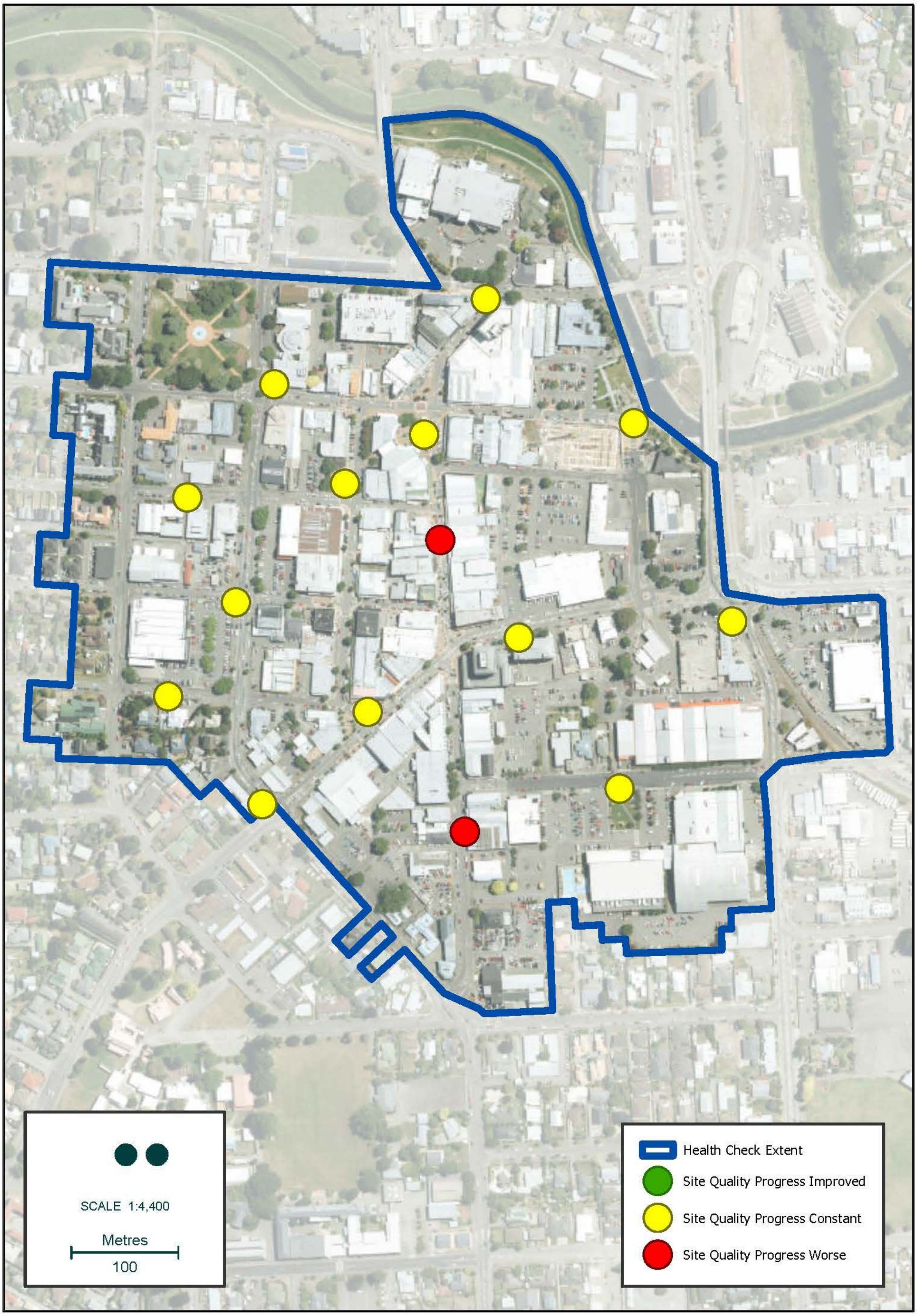
Appendix D: Blenheim CBD Pedestrian Routes Map



Appendix E: Blenheim CBD State of the Environment Map



Appendix F: Blenheim CBD State of the Environment Progress Map

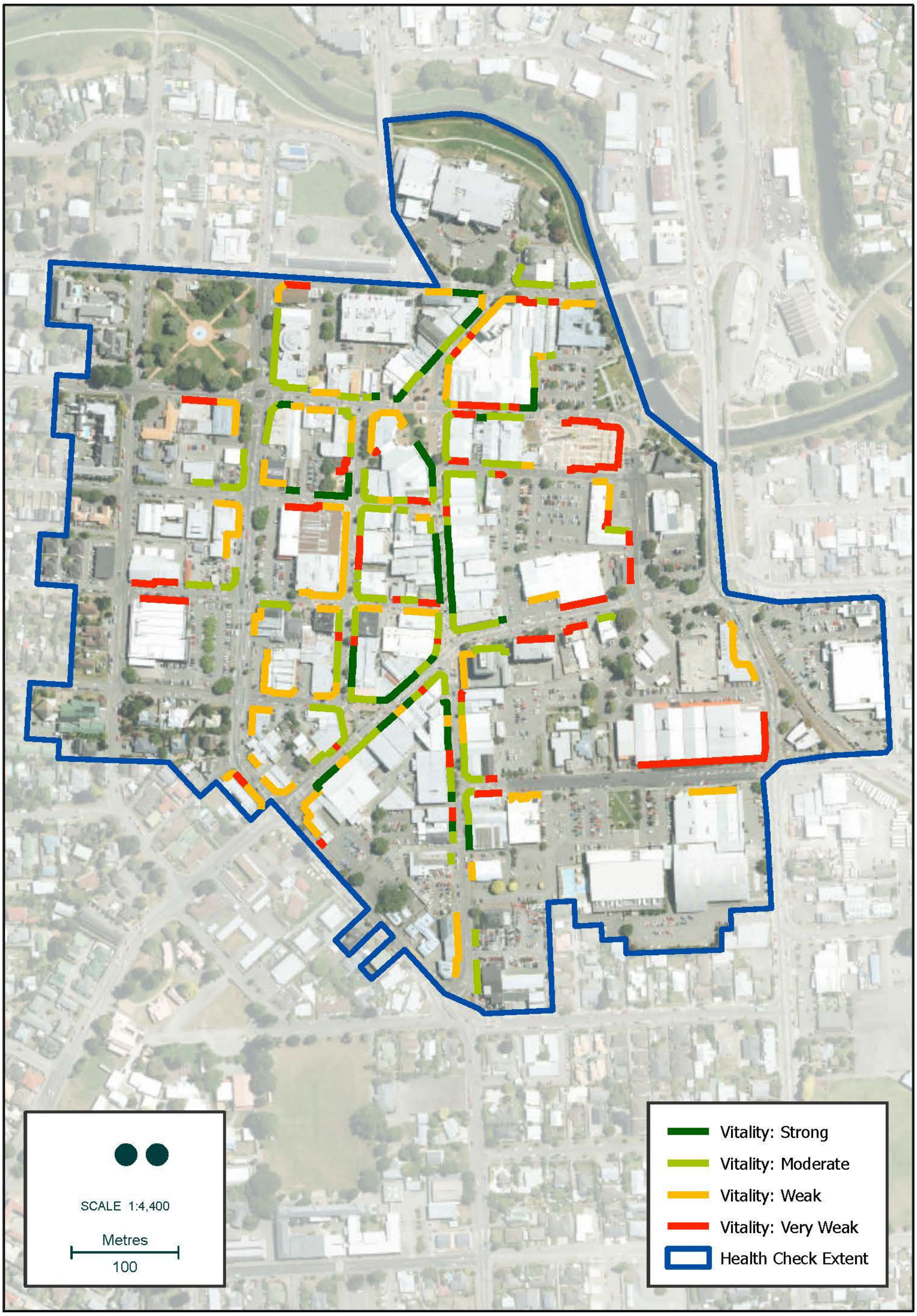


Appendix G: Blenheim CBD State of the Environment Tables

30/11/21 3:30pm	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 2021	Conclusion 2020	Conclusion 2018	Conclusion 2016
Intersection of Leith Terrace and Russel Terrace	2	2	2	1	1	1	2	0	2	2	2	1	2	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	Average
River bank area on Symons Street	2	1	2	2	2	2	1	2	2	2	2	NONE	2	Good	Good	Good
Forum/Market Place	2	2	2	2	2	2	2	1	2	1	2	NONE	2	Good	Bad	Bad
Queen Street, Liz Davidson Place	2	2	2	2	2	2	2	1	2	2	2	NONE	2	Good	Good	Good
Charles Street	2	2	2	2	2	0	0	0	1	2	2	NONE	1	Average	Average	Average
Market Street	2	1	1	1	1	2	2	0	2	1	2	NONE	1	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	Average
Intersection of Redwood and Main Street	1	0	0	1	2	0	0	0	2	2	1	NONE	1	Average	Bad	Bad
Main Street	2	2	2	2	2	2	1	0	2	2	2	NONE	2	Good	Average	Average
George Street	2	2	1	1	2	0	0	0	1	2	2	1	1	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
Kinross Street	2	1	2	2	2	2	1	2	1	2	2	NONE	2	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
Scott Street	2	2	2	1	2	1	1	0	2	1	1	NONE	1	Good	Average	Average
Average	2	2	2	2	2	1	1	1	2	2	2	2				

02/12/21 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 2021	Conclusion 2020	Conclusion 2018	Conclusion 2016
Intersection of Leith Terrace and Russel Terrace	1	2	2	2	2	2	2	0	1	2	2	1	2	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	Average
River bank area on Symons Street	2	1	2	2	2	2	1	2	2	2	2	NONE	2	Good	Good	Good
Forum/Market Place	2	2	2	2	2	2	1	2	2	2	2	NONE	2	Good	Bad	Bad
Queen Street, Liz Davidson Place	2	2	2	2	2	2	2	1	2	2	2	NONE	2	Good	Good	Good
Charles Street	2	2	2	2	2	0	0	0	1	2	2	NONE	1	Average	Average	Average
Market Street	2	1	1	2	2	2	2	0	1	1	2	NONE	1	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	Average
Intersection of Redwood and Main Street	2	0	1	1	2	0	0	0	2	2	1	NONE	1	Average	Bad	Bad
Main Street	2	1	1	2	2	2	2	0	2	2	2	NONE	2	Good	Average	Average
George Street	2	2	1	2	2	0	0	0	1	2	2	1	1	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
Kinross Street	2	2	2	2	2	2	1	2	1	2	2	NONE	2	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
Scott Street	2	2	2	1	2	1	1	0	2	1	1	NONE	1	Good	Average	Average
Average	2	1	2	2	2	1	1	1	2	2	2	2				

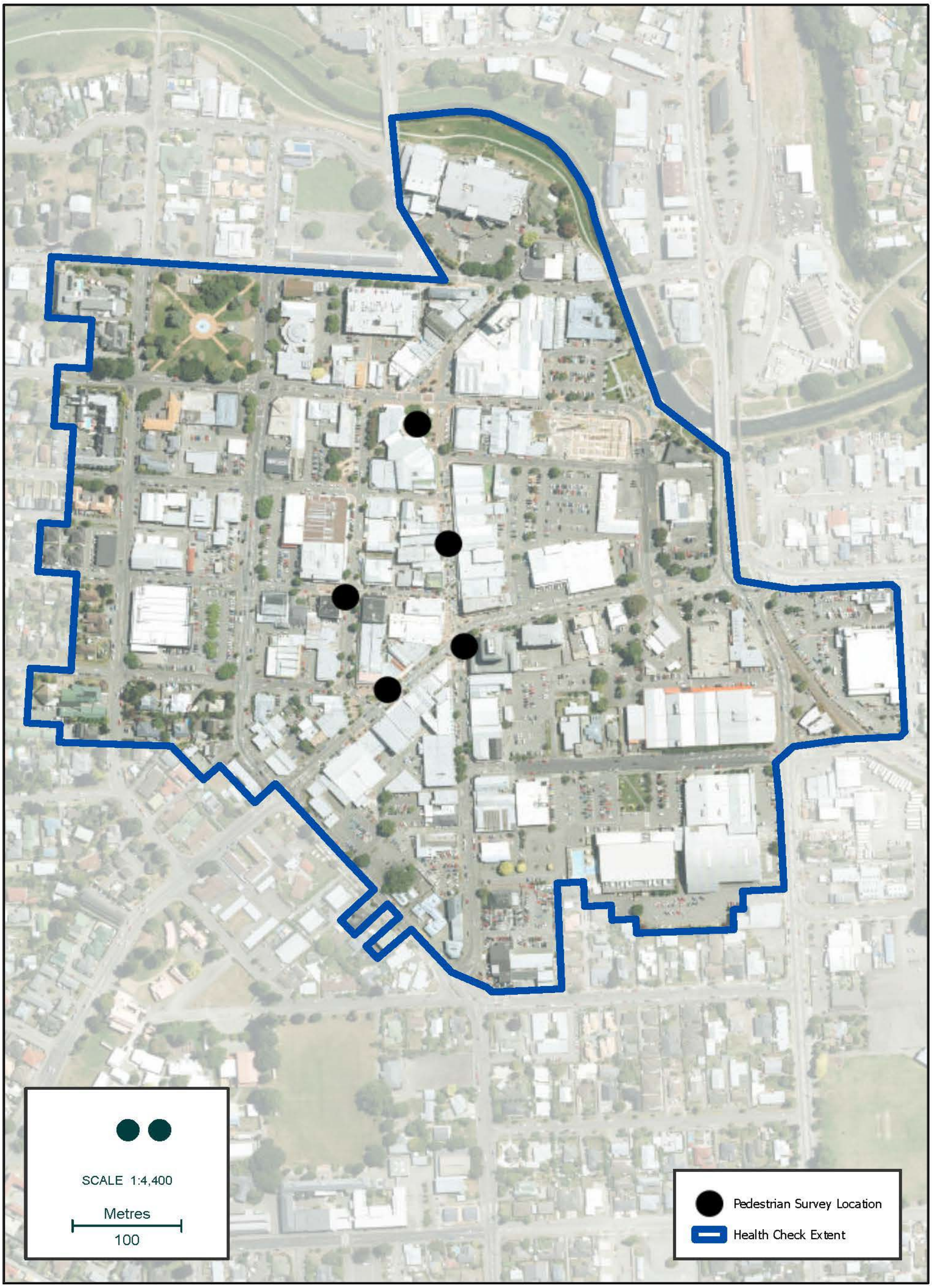
Appendix H: Blenheim CBD Street Vitality Map



Appendix I: Blenheim Pedestrian Survey

1. 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: Blenheim CBD Pedestrian Survey Points Map



Appendix K: Blenheim CBD Photo Survey Points Map