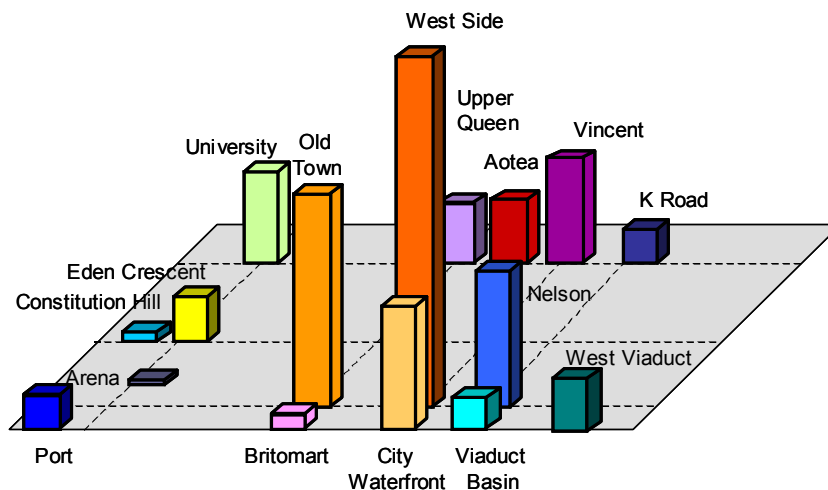


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Auckland CBD Business & Employment Analysis



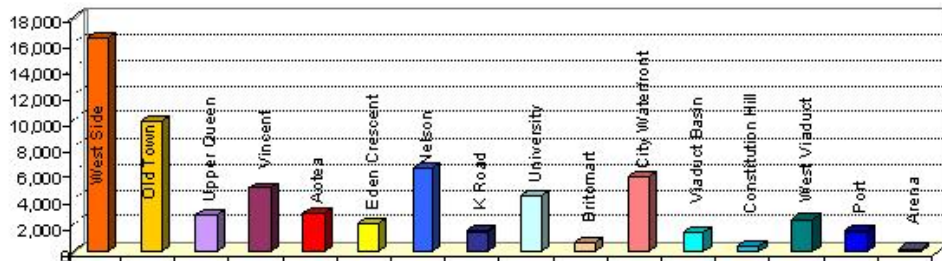
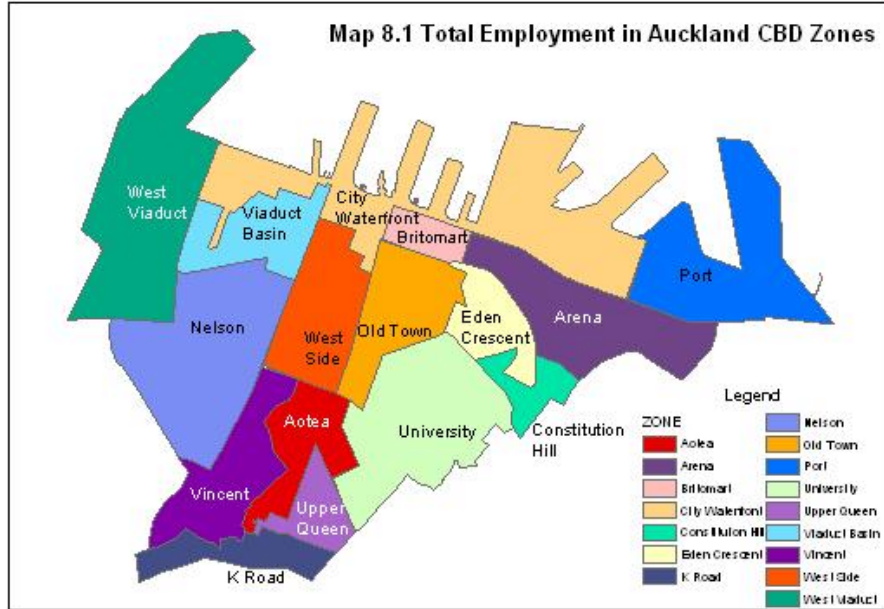
Report Part c
Contents refer to Part a

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8. CBD Zones – Individual analysis

The following maps summarise the results of the previous section and show the overall employment makeup of each of the CBD Zones by the Top 10 selected Business Groupings.



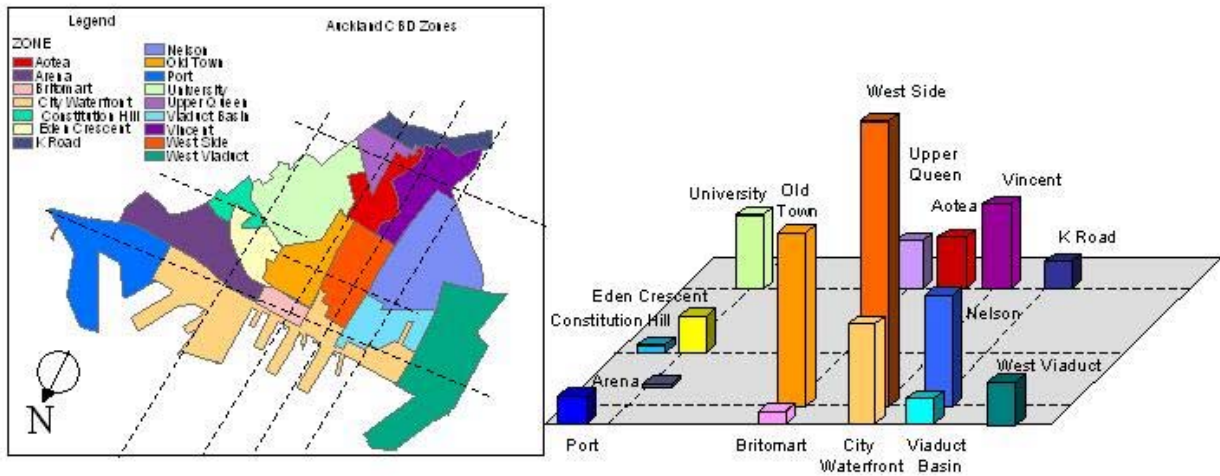
Map 8.1 CBD Zones with relative employment sizes.



The following map rearranges this information, and projects each employment total into a position which roughly corresponds with the Zones location on the CBD. It can be thought of as a "helicopter view" of the CBD's employment if all of the employees in each Zone were grouped into a single building in their Zones at equal densities per "floor". The projection shows how high each "building" would be in this scenario.

The approximate position of the viewpoint is above the Harbour Bridge.

Map 8.2 Projection of Relative Employment by CBD Zone (Simulated Aerial view of CBD from above Harbour Bridge)



The dotted lines indicate the approximate perspective lines along which the bars representing each Zone are plotted

The height of each bar represents the total employment within each Zone

(“If all the employees in each Zone were in a single, similar building, how high would each building be?”)

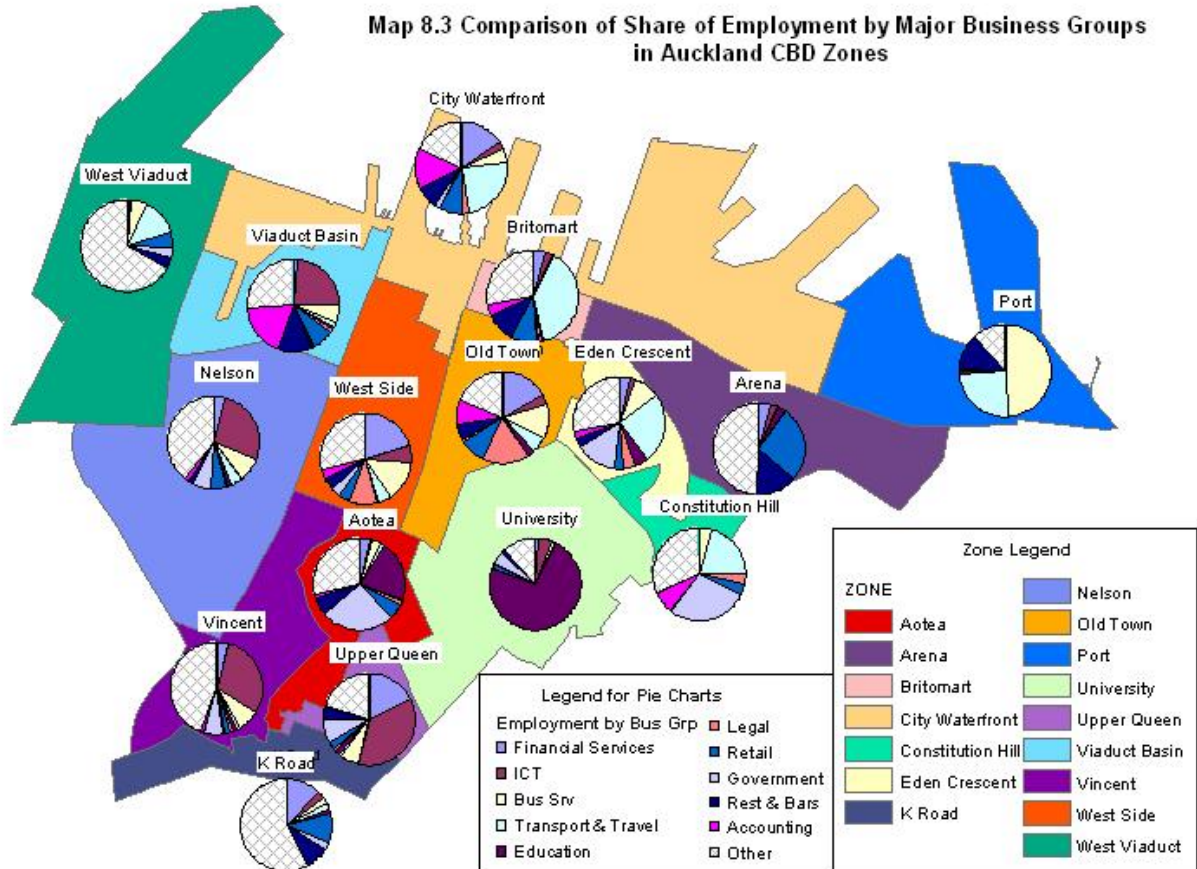
Map 8.2 Projection of Relative Employment by CBD Zone

The map of Zones to the side shows each of the Zones. The dotted lines indicate the approximate perspective lines along which the bars showing the total Zone Employment are arranged.



The map below summarises the makeup of Total Employment by the major Business Groupings in each of the Zones, as well as illustrating what proportion of total employment within the Zone is in business activities outside of the selected Business Groups.

Note that Each Zone’s detailed employment breakdown is shown in Appendix B.



Map 8.3 CBD Zones with share of employment breakdown in major Business Groups.

Zone Details

Appendix B shows the business statistics for each of the identified CBD Zones, showing :

- a) a breakdown of the Business Units and FTE’s in the Zone in the selected Business groupings
- b) Employment in industry codes outside the selected Business Groupings that have over 50 FTE’s in the Zone
- c) Industry Codes outside the selected Business Units which have more than 10 Business Units in the Zone, and are not included in b) above
- d) A chart showing the employment breakdown within the Zone.



9. Breakdown of Selected Business Groupings

Four of the Top 10 Business Groups have been selected for further analysis in the report. Principally, these are the top Business Groups in terms of employment and Retail, as this Business Group is made up of a number of different industry classifications. The four Business Groups selected for this report are :

- Financial Services
- ICT
- Retail
- Transport & Travel

Each of these Business Groups is further analysed in the remainder of this section.

Financial Services

Financial Services represents the largest Business Group in terms of employment in the CBD, with 7,272 FTE's in 1,418 business units. Included in Financial Services are Banking, Investment, Financing, Insurance and Investment

The individual Industry Codes which make up the Financial Services Business Group and their assigned sub-groupings are shown in the table below:

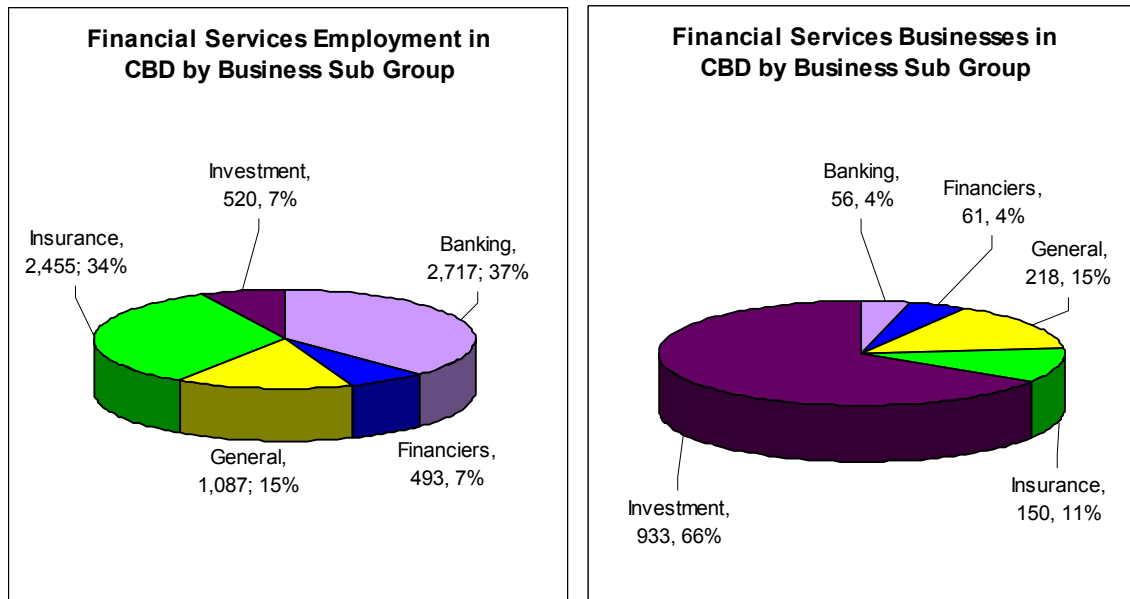
Industry Code (ANZSIC6)	Industry Code Description	Business Group	Business Sub Group
K732300	Credit Unions	Financial Services	Banking
K732200	Building Societies	Financial Services	Banking
K732100	Banks	Financial Services	Banking
K732900	Deposit Taking Financiers nec	Financial Services	Financiers
K733000	Other Financiers	Financial Services	Financiers
K751900	Services to Finance and Investment nec	Financial Services	General
K752000	Services to Insurance	Financial Services	Insurance
K741100	Life Assurance	Financial Services	Insurance
K742100	Health Insurance	Financial Services	Insurance
K742200	General Insurance	Financial Services	Insurance
K751100	Financial Asset Broking Services	Financial Services	Investment
K734000	Financial Asset Investors	Financial Services	Investment
K741200	Superannuation	Financial Services	Investment

The tables and charts in the following sections break down the Financial Services Business Group in the CBD into these sub-groups and show the distribution across the CBD Zones.



Financial Services Employment & Business Units by Sub Grouping

The following charts show the breakdown of the Financial Services business group in the CBD:



Observations:

- a) Banking & Insurance account for the largest proportion of the Financial Services Business Group Both in terms of Employment (37% and 34% of total respectively) and are mostly larger business units
- b) Investment companies account for 66% of business units, but only 7% of employment in the CBD. This is probably due to the fact that a number of companies are set up specifically for the purposes of managing investments, and possibly to limit liability.
- c) General services to finance & investment account for 15% of the total employment and business units in the CBD
- d) The relative ratios of share of employment and share of business units indicate that Banks & Insurance business units are significantly larger than the other subgroups

The distribution of Financial Services Employees and Business Units in each of the sub groups across the CBD Zones is shown in the tables below:

Financial Services Employment by Business SubGroup and Zone (FTE's)

Rank	Zone	Total Of Opt_FTEs	Banking	Financiers	General	Insurance	Investment
8	Aotea	107	36		4	66	1.25
14	Arena	8		6			2
11	Britomart	28			27		1
3	City Waterfront	892	326	67	45	447	8
16	Constitution Hill	1					0.75
9	Eden Crescent	76			56	18	1.75
7	K Road	183	139	41	1	0	1.75
5	Nelson	245	2	180	25	31	7
2	Old Town	1,661	539	94	151	603	274.5
15	Port	1	0				1

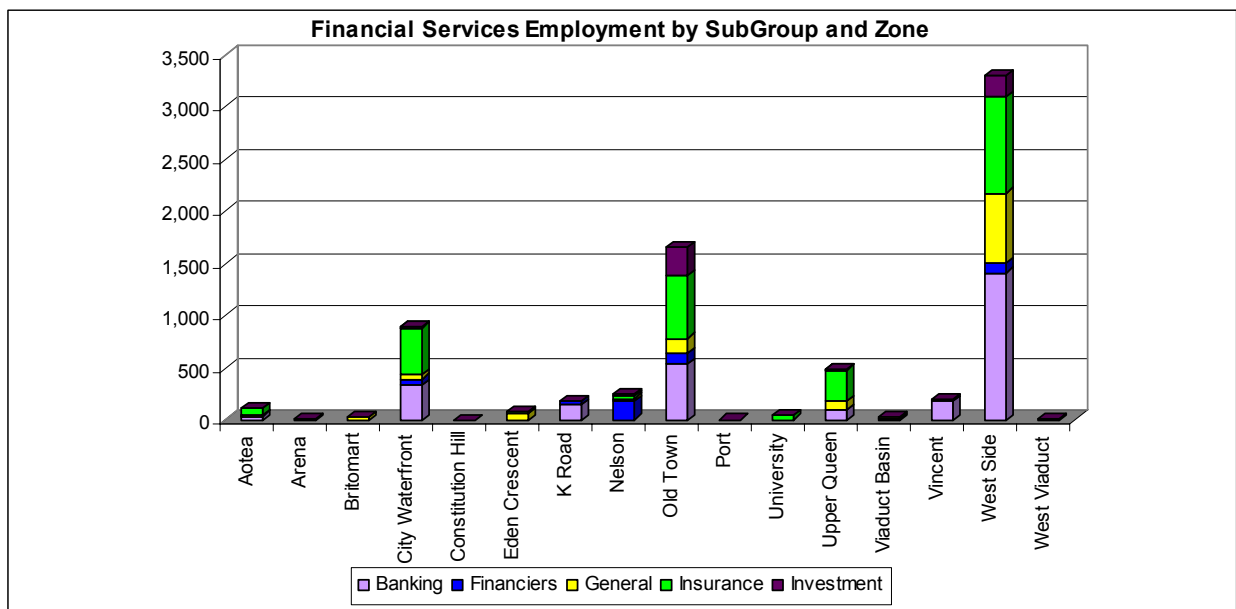


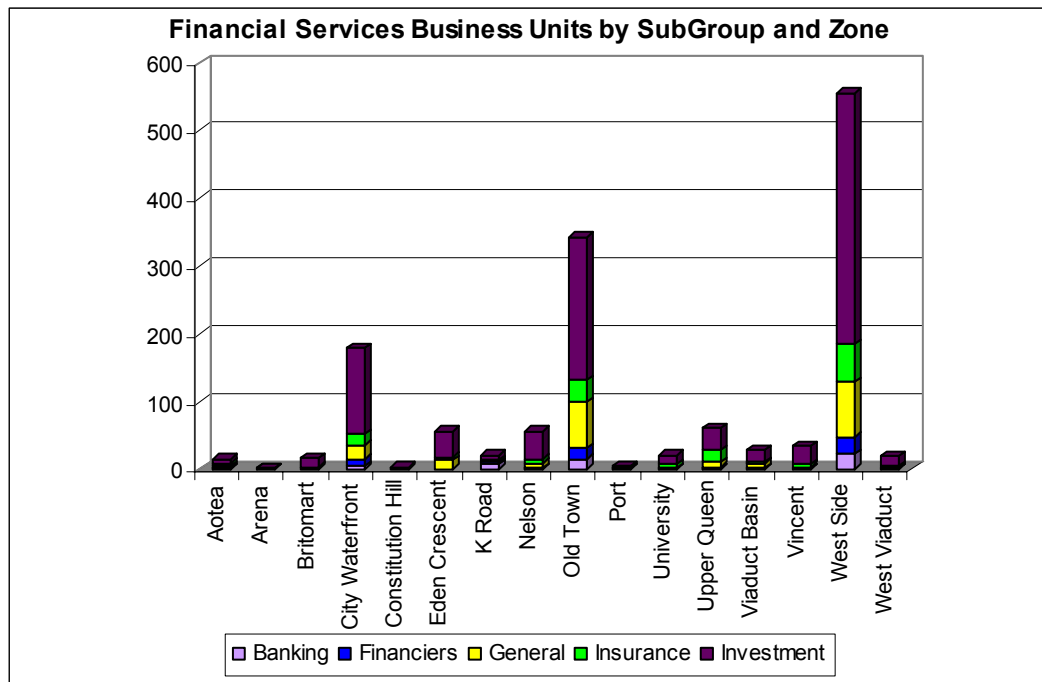
10	University	41	2			38	1.75
4	Upper Queen	489	90	1	87	299	11.75
12	Viaduct Basin	24		8	13	1	2
6	Vincent	199	174			12	4
1	West Side	3,306	1,410	96	669	931	201
13	West Viaduct	13			0	12	0.5
Total		7,272	2,717	493	1,087	2,455	520
% Total			37.4%	6.8%	14.9%	33.8%	7.2%

Financial Services Number of Business Units by Business SubGroup and Zone

Rank	Zone	Bus Units	Banking	Financiers	General	Insurance	Investment
13	Aotea	15	2		3	4	6
16	Arena	2		1			1
12	Britomart	17			3		14
3	City Waterfront	179	5	10	21	15	128
15	Constitution Hill	3					3
5	Eden Crescent	56			14	4	38
9	K Road	21	7	3	3	1	7
5	Nelson	56	1	1	7	6	41
2	Old Town	343	15	17	68	31	212
14	Port	5	1				4
9	University	21	1			7	13
4	Upper Queen	61	1	2	7	19	32
8	Viaduct Basin	29		1	8	1	19
7	Vincent	35	1		2	4	28
1	West Side	555	22	26	81	55	371
11	West Viaduct	20			1	3	16
Total		1,418	56	61	218	150	933
% Total			3.9%	4.3%	15.4%	10.6%	65.8%

These tables are illustrated in the charts below:





Key Observations

- a) Financial Services Business Group Employment is most concentrated in West Side, Old Town and City Waterfront Zones, all of which have in excess of 900 Financial Services FTE's.
- b) The only other Zone with significant Financial Services employment is Upper Queen with just under 500 FTE's
- c) The Financial Services Business Group business units are heavily concentrated in the same three Zones, and all have over 180 ICT business units
- d) West Side has double the Financial Services employment of Old Town, which in turn has almost double the employment of City Waterfront
- e) West Side has almost three times the number of banking FTE's in Old Town, which in turn has almost double the employment of City Waterfront
- f) West Side has 50% more Insurance employment than Old Town, which in turn has 50% more Insurance employment than City Waterfront
- g) Financiers employment is concentrated in Nelson Zone as well as the main 3 Zones
- h) General services to Investment & Finance employment is concentrated in West Side, Zone
- i) Outside these four key Zones, Financial Services employment is negligible in the other CBD Zones, apart from some banking employment in K Road and Vincent.



An idea of the relative sizes of organisations can be gained by looking at the Average number of Employees per business unit. Although subject to distortions, this is a useful measure to establish key locations of larger businesses. In the Financial Services sector, Banking business units will include branches, head offices, key administration or IT units as separate business units if they are located separately.

The following table shows the Average number of FTE's per Business Unit in each of the sub groups across the CBD Zones.

Financial Services		Average Employees per Business Unit (FTE/BU)					
Rank	Zone	Financial Services	Banking	Financiers	General	Insurance	Investment
7	Aotea	11.8	18.0	0.0	1.3	16.4	0.2
10	Arena	6.0	0.0	6.0	0.0	0.0	2.0
9	Britomart	8.8	0.0	0.0	8.8	0.0	0.1
2	City Waterfront	17.3	65.2	6.7	2.1	29.8	0.1
N/A	Constitution Hill		0.0	0.0	0.0	0.0	0.3
12	Eden Crescent	4.1	0.0	0.0	4.0	4.6	0.0
6	K Road	12.9	19.9	13.7	0.2	0.3	0.3
5	Nelson	15.8	1.8	180.0	3.5	5.2	0.2
8	Old Town	10.6	35.9	5.5	2.2	19.4	1.3
15	Port	0.3	0.3	0.0	0.0	0.0	0.3
11	University	4.9	1.5	0.0	0.0	5.4	0.1
4	Upper Queen	16.5	89.8	0.6	12.5	15.8	0.4
14	Viaduct Basin	2.2	0.0	8.0	1.6	1.3	0.1
1	Vincent	27.8	174.0	0.0	5.9	2.2	0.1
3	West Side	16.9	64.1	3.7	8.3	16.9	0.5
13	West Viaduct	3.1	0.0	0.0	0.3	4.1	0.0
	Total	13.9	48.5	8.1	5.0	16.4	0.6
	Minimum	0.3	1.5	0.6	0.3	1.3	0.1
	Maximum	27.8	174.0	180.0	12.5	29.8	2.0

See note
a) below

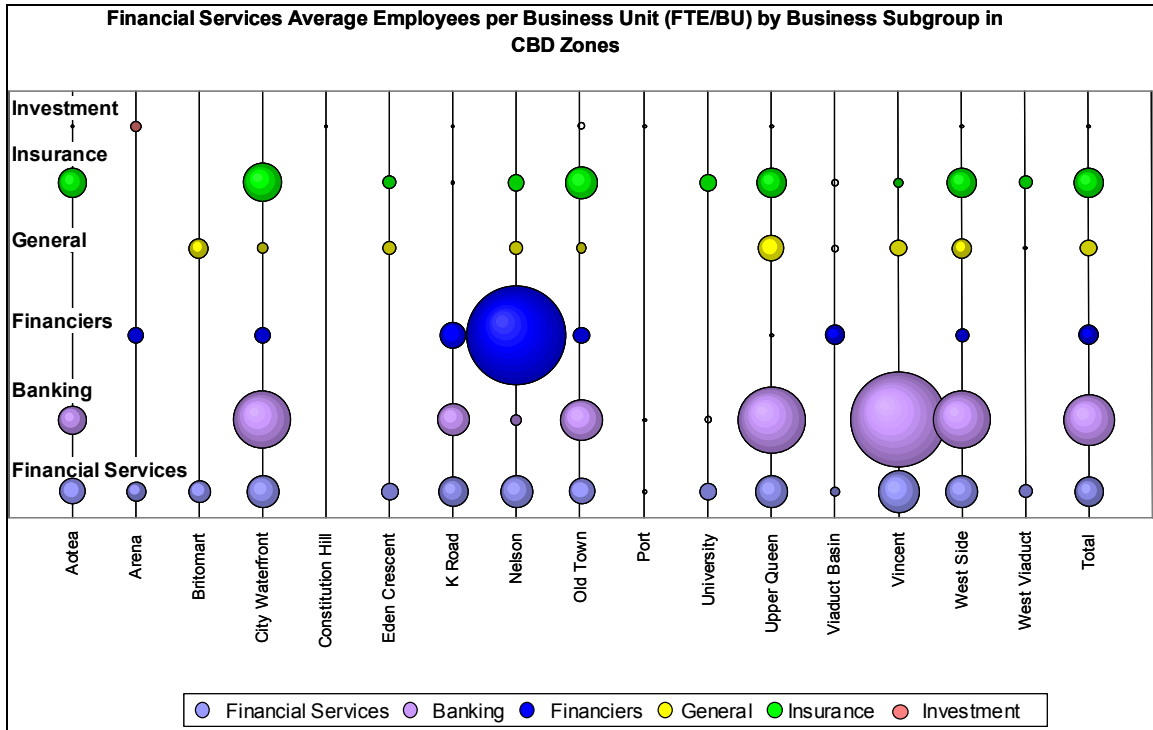
Observations:

- a) The large number of "shell" companies in the Investment subgroup can distort the average business size measurements. The measurements shows under Financial Services above therefore *exclude the measures for Investment*.
- b) The average size of a Financial Services business unit in the CBD is 14 FTE's
- c) The largest average size is in Banking (average 48 employees) followed by Insurance (16 employees)
- d) Financiers & General Services to Finance organisations employ an average 8 and 5 FTE's respectively
- e) Within these subgroups, there are significant variations within the Zones
- f) Financiers are heavily concentrated in Nelson, with 180 employees in one business unit.
- g) Banking employees are reasonably well-distributed. The larger zones tend to have a single large business unit, with the exception of West Side & Old Town
- h) Insurance average employment is between 15 and 20 in the key Zones of Aotea, Old Town, Upper Queen and West side, with a maximum of 30 in the City Waterfront; it should be noted that the number of business units varies significantly between these five Zones: Aotea (4), Old Town (31), Upper Queen (19) and West side (55) with 15 in the City Waterfront Zone



- i) In the Investment subgroup, nearly all Zones have significantly less than one FTE per business unit.

These sizes are shown in the bubble chart or “abacus” below – each bubble represents the average FTE/Business unit for each sub group in each Zone



The chart illustrates the key concentrations of Financial Services employment in terms of FTE’s per business unit (i.e. implying the presence of larger companies) to be:

- a) Financiers in Nelson
- b) Banking in Vincent, Upper Queen and City Waterfront
- c) Insurance in City Waterfront, with fairly even average sizes in five other Zones, as shown
- d) General services to Finance in Upper Queen, West Side and Britomart
- e) Overall, Financial Services average employment is largest in Vincent, and Banking shows the highest average FTE’s per Business Unit



ICT

ICT represents the second largest Business Group in terms of employment in the CBD, with 6,543 FTE's in 372 business units. Included in ICT are IT Services, Sales of IT equipment and software, Telecommunications and Broadcasting (TV, radio etc).

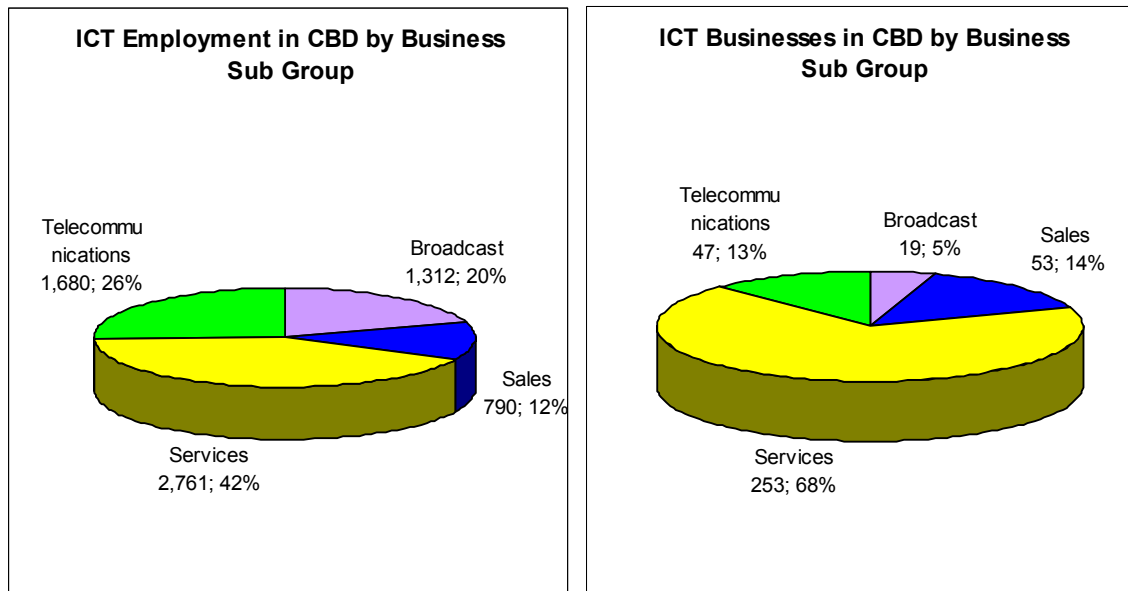
The individual Industry Codes which make up the ICT Business Group are derived from the MED classifications used in their research into the IT industry in New Zealand. The industry codes and their assigned sub-groupings are shown in the table below:

Industry Code (ANZSIC6)	Industry Code Description	Business Group	Business Sub Group
C284200	Television Broadcasting	ICT	Broadcast
P912100	Radio Broadcasts	ICT	Broadcast
P912200	T.V. Broadcasts	ICT	Broadcast
C284100	Computer, Bus Mach Mfg	ICT	Sales
C284900	Electronic Equipment suppliers	ICT	Sales
F461300	Computer Wholesale	ICT	Sales
L783400	Computer Consultancy Services	ICT	Services
L783200	Info Storage & Retrieval	ICT	Services
L783300	Computer Maintenance	ICT	Services
L783100	Data Processing	ICT	Services
J712000	Telecommunication Services	ICT	Telecommunications

The tables and charts in the following sections break down the ICT Business Group in the CBD into these sub-groups and show the distribution across the CBD Zones.

ICT Employment & Business Units by Sub Grouping

The following charts show the breakdown of the ICT business group in the CBD:





Observations:

- a) Services account for the largest proportion of the ICT Business Group Both in terms of Employment (42% of total) and even more so in terms of Business Units (68% of total)
- b) Telecommunications is the next largest sub group, with 1,680 employees in the CBD in 47 business units
- c) The relative ratios of share of employment and share of business units indicate that Services business units are smaller than the Telecommunications or Broadcast subgroups

The distribution of ICT Employees and Business Units in each of the sub groups across the CBD Zones is shown in the tables below:

ICT Employment by Business SubGroup and Zone (FTE's)

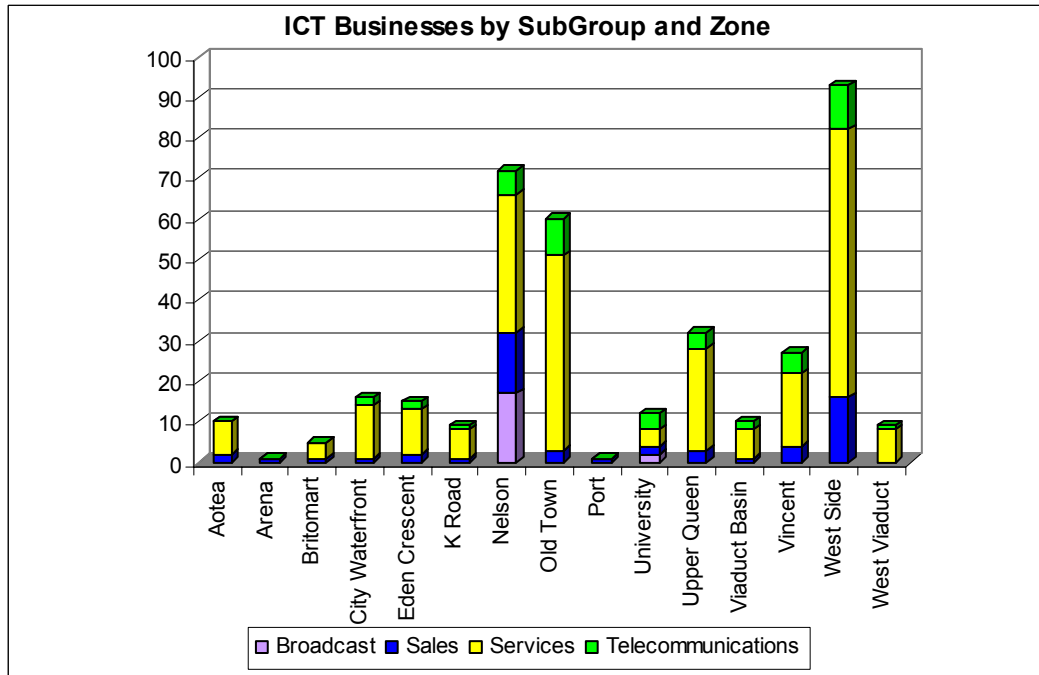
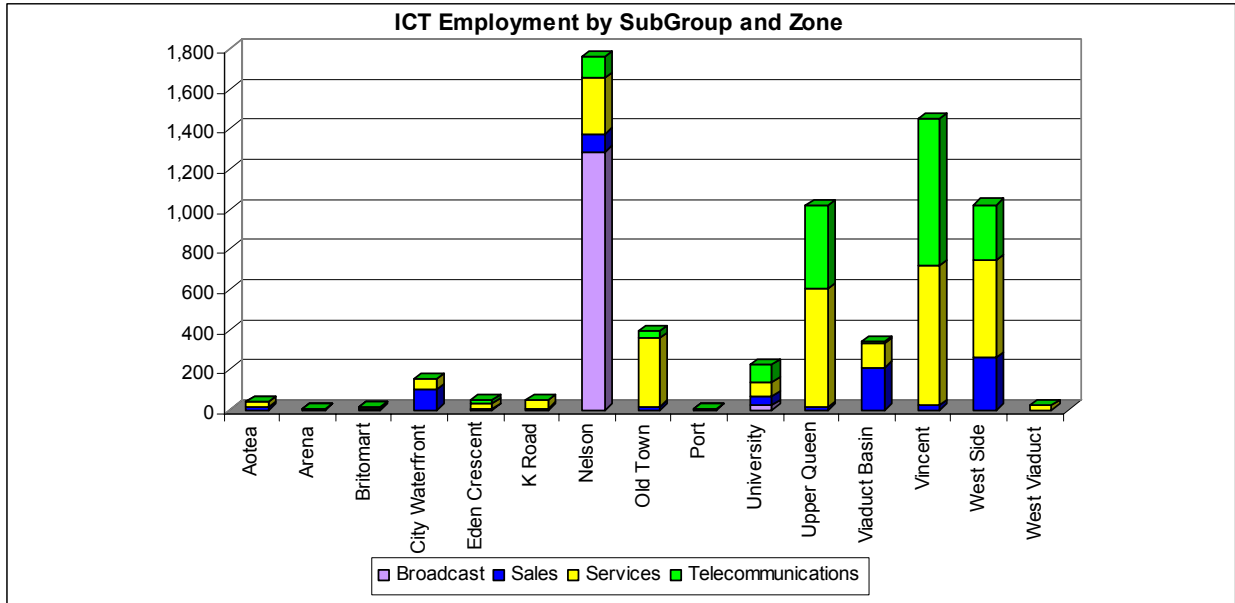
Rank	Zone	Total Of Opt_FTEs	Broadcast	Sales	Services	Telecommunications
11	Aotea	36		12	25	
14	Arena	5		5		
13	Britomart	15		7	8	
8	City Waterfront	154		98	55	1
10	Eden Crescent	47		3	27	17
9	K Road	47		9	37	1
1	Nelson	1,763	1,290	88	280	106
5	Old Town	392		18	339	35
15	Port	1		1		
7	University	224	23	43	74	85
4	Upper Queen	1,018		11	594	413
6	Viaduct Basin	341		210	121	10
2	Vincent	1,454		24	694	736
3	West Side	1,023		261	487	275
12	West Viaduct	23			22	1
	Total	6,543	1,312	790	2,761	1,680
	% Total		20.1%	12.1%	42.2%	25.7%

ICT Number of Business Units by Business SubGroup and Zone

Rank	Zone	Bus Units	Broadcast	Sales	Services	Telecommunications
9	Aotea	10		2	8	
14	Arena	1		1		
13	Britomart	5		1	4	
6	City Waterfront	16		1	13	2
7	Eden Crescent	15		2	11	2
11	K Road	9		1	7	1
2	Nelson	72	17	15	34	6
3	Old Town	60		3	48	9
14	Port	1		1		
8	University	12	2	2	4	4
4	Upper Queen	32		3	25	4
9	Viaduct Basin	10		1	7	2
5	Vincent	27		4	18	5
1	West Side	93		16	66	11
11	West Viaduct	9			8	1
	Total	372	19	53	253	47
	% Total		5.1%	14.2%	68.0%	12.6%



These tables are illustrated in the charts below:



Key Observations

- a) ICT Business Group Employment is most concentrated in Nelson, Vincent, West Side and Upper Queen Zones, all of which have in excess of 1,000 ICT FTE's
- b) Other key Zones of ICT employment are Old Town and Viaduct Basin, both with just under 400 FTE's



- c) The ICT Business Group business units are heavily concentrated in the West Side, Nelson and Old Town Zones, all of which have over 50 ICT business units
- d) Nelson’s ICT employment is heavily dominated by broadcast, being the location of TVNZ and other broadcasting organisations
- e) ICT Sales organisations are concentrated in terms of employment in West Side and the Viaduct Basin & Vincent Zones. Many of the large IT multinationals have their offices in these two Zones. Nelson, has fewer FTE’s in Sales, but a large number of business units, indicating that there may be a lot of small ICT sales operations in Nelson
- f) Telecommunications Employment is concentrated in Upper Queen and Vincent Zones. These Zones include key locations of Telecom NZ.
- g) Outside these six key Zones, ICT employment is negligible in the other CBD Zones.

An idea of the relative sizes of organisations can be gained by looking at the Average number of Employees per business unit. The following table shows the Average number of FTE’s per Business Unit in each of the sub groups across the CBD Zones.

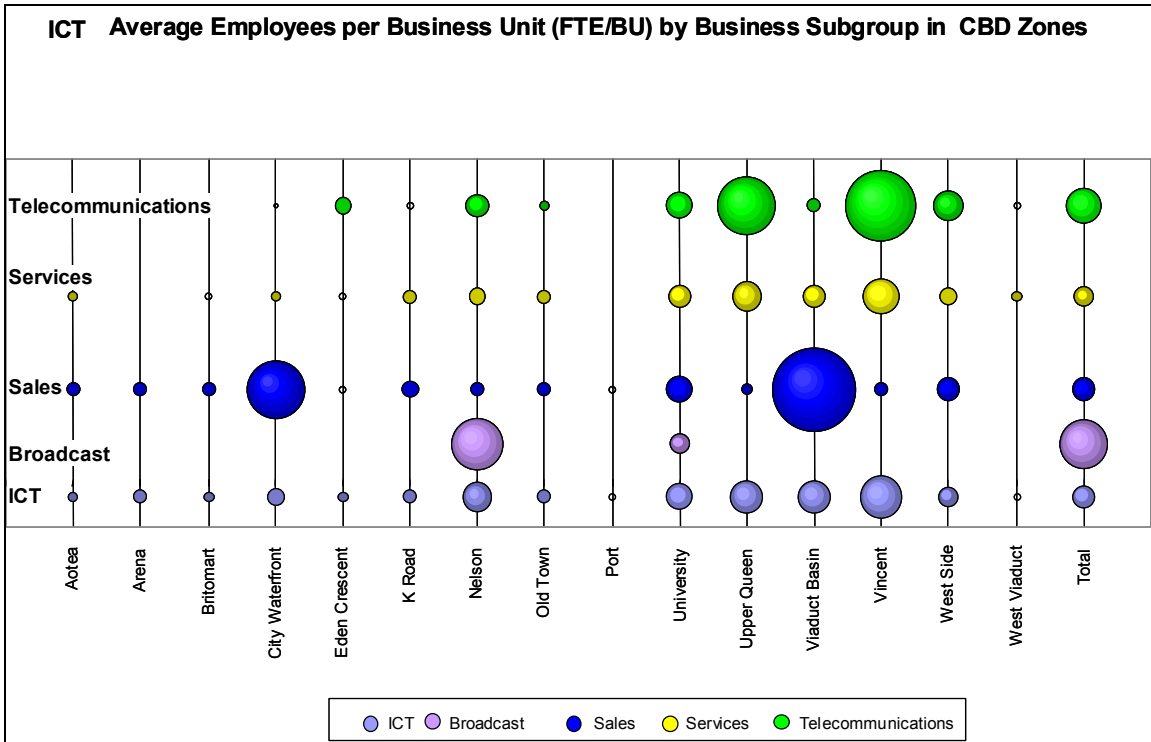
ICT Average Employees per Business Unit (FTE/BU)						
Rank	Zone	ICT	Broadcast	Sales	Services	Telecommunications
11	Aotea	3.6	0.0	5.8	3.1	0.0
9	Arena	5.3	0.0	5.3	0.0	0.0
13	Britomart	3.0	0.0	7.0	1.9	0.0
7	City Waterfront	9.6	0.0	97.8	4.3	0.6
12	Eden Crescent	3.1	0.0	1.6	2.4	8.4
10	K Road	5.2	0.0	9.0	5.3	1.3
4	Nelson	24.5	75.9	5.9	8.2	17.6
8	Old Town	6.5	0.0	6.0	7.1	3.9
15	Port	1.3	0.0	1.3	0.0	0.0
5	University	18.7	11.3	21.5	18.4	21.3
3	Upper Queen	31.8	0.0	3.7	23.8	103.3
2	Viaduct Basin	34.1	0.0	210.0	17.3	5.0
1	Vincent	53.9	0.0	6.1	38.5	147.2
6	West Side	11.0	0.0	16.3	7.4	25.0
14	West Viaduct	2.5	0.0	0.0	2.7	1.3
	Total	17.6	69.1	14.9	10.9	35.8
	Minimum	1.3	11.3	1.3	1.9	1.3
	Maximum	53.9	75.9	210.0	38.5	147.2

Observations:

- a) The average size of an ICT business unit in the CBD is 17.6 FTE’s
- b) The largest average size is in Broadcast (average 69 employees) followed by Telecommunications (36 employees)
- c) IT Sales organisations employ an average of 15 FTE’s and Services 11 people
- d) Within these subgroups, there are significant variations within the Zones
- e) Broadcast has employees in only two Zones, University, with 11 FTE’s/Business unit and Nelson, with 76.
- f) Telecommunications ranges from 1.3 in West Side and K Road to just under 150 in Vincent and 100 in Upper Queen
- g) Sales ranges form 1.3 in Port to 210 in Viaduct Basin
- h) Services shows a narrower range, from 1.9 in Britomart to 38 in Vincent.



These sizes are shown in the bubble chart or "abacus" below – each bubble represents the average FTE/Business unit for each sub group in each Zone



The chart illustrates the key concentrations of ICT employment in terms FTE’s per business unit (i.e. implying the presence of larger companies) to be:

- a) IT Sales in the Viaduct Basin
- b) Telecommunications in Vincent & Upper Queen
- c) Sales in City Waterfront
- d) Broadcast in Nelson
- e) Overall ICT in Vincent, followed by Viaduct Basin and Upper Queen



Retail

Retail represents the seventh largest Business Group in terms of employment in the CBD, with 3,472 FTE's in 765 business units. Included in Retail are Clothing & Footwear, Food & Beverage (including groceries, Supermarkets), Household Goods, Motor and Recreation, Sports & Entertainment.

The individual Industry Codes which make up the Retail Business Group and their assigned sub-groupings are shown in the table below:

Industry Code (ANZSIC6)	Industry Code Description	Business Group	Business Sub Group
G525900	Retailing- not elsewhere classified	Retail	General
G522100	Clothing Retailing	Retail	Clothing & Footwear
G521000	Department Stores	Retail	Clothing & Footwear
G522200	Footwear Retailing	Retail	Clothing & Footwear
G512900	Specialised Food Retailing nec	Retail	Food & Beverage
G511020	Groceries and Dairies	Retail	Food & Beverage
G512510	Fish and Chips, Hamburger, Ethnic Food,	Retail	Food & Beverage
G512590	Other Takeaway Stores (including	Retail	Food & Beverage
G512400	Bread and Cake Retailing	Retail	Food & Beverage
G512300	Liquor Retailing	Retail	Food & Beverage
G525400	Flower Retailing	Retail	Food & Beverage
G512540	Pizza Takeaway Stores	Retail	Food & Beverage
G512520	Chicken Takeaway Stores	Retail	Food & Beverage
G512200	Fruit and Vegetable Retailing	Retail	Food & Beverage
G512530	Ice-Cream Parlours and Mobile Ice-Cream	Retail	Food & Beverage
G511010	Supermarkets	Retail	Food & Beverage
G512100	Fresh Meat, Fish and Poultry Retailing	Retail	Food & Beverage
G522300	Fabrics and other Soft Good Retailing	Retail	Household Goods
G523200	Floor Covering Retailing	Retail	Household Goods
G523100	Furniture Retailing	Retail	Household Goods
G526900	Household Equipment Repair Services nec	Retail	Household Goods
G523300	Domestic Hardware and Houseware Retailing	Retail	Household Goods
G523400	Domestic Appliance Retailing	Retail	Household Goods
G525200	Antique and Used Good Retailing	Retail	Household Goods
G525100	Pharmaceutical, Cosmetic and Toiletry	Retail	Household Goods
G526100	Household Equipment Repair Services	Retail	Household Goods
G532100	Automotive Fuel Retailing	Retail	Motor
G531200	Motor Cycle Dealing	Retail	Motor
G532400	Tyre Retailing	Retail	Motor
G531100	Car Retailing	Retail	Motor
G532300	Smash Repairing	Retail	Motor
G532900	Automotive Repair and Services nec	Retail	Motor
G532200	Automotive Electrical Services	Retail	Motor
G524300	Newspaper, Book and Stationery Retailing	Retail	Recreation, Sport & Entertainment
G524500	Marine Equipment Retailing	Retail	Recreation, Sport & Entertainment
G524400	Photographic Equipment Retailing	Retail	Recreation, Sport & Entertainment



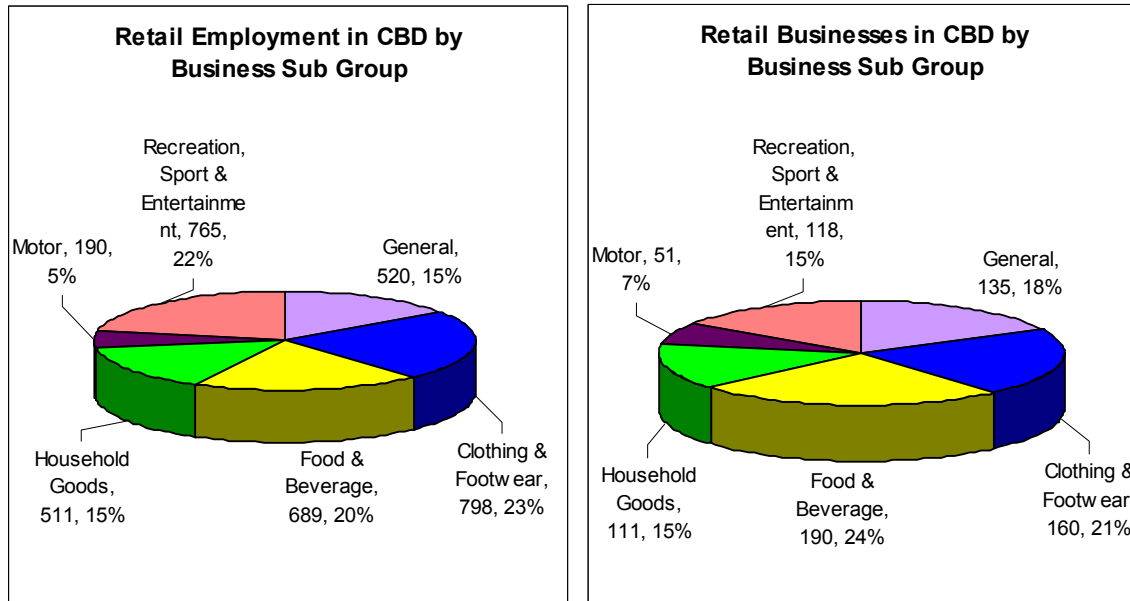
G524200	Toy and Game Retailing	Retail	Recreation, Sport & Entertainment
G525500	Watch and Jewellery Retailing	Retail	Recreation, Sport & Entertainment
G523500	Recorded Music Retailing	Retail	Recreation, Sport & Entertainment
G524100	Sport and Camping Equipment Retailing	Retail	Recreation, Sport & Entertainment

The tables and charts in the following sections break down the Retail Business Group in the CBD into these sub-groups and show the distribution across the CBD Zones.



Retail Employment & Business Units by Sub Grouping

The following charts show the breakdown of the Retail business group in the CBD:



Observations:

- a) Retail employment and business units are more evenly distributed across the different subgroups than either of the previous two groups.
- b) Food & Beverage account for the largest proportion of the Retail Business Group in terms of Employment (20%) and Business Units (24%)
- c) Recreation, Sport and Entertainment retail outlets are the second largest group, and indicate slightly larger outlets in terms of employment as they account for 22% of employment but 15% of business units

The distribution of Retail Employees and Business Units in each of the sub groups across the CBD Zones is shown in the tables below:

Retail Employment by Business SubGroup and Zone (FTE's)

Rank	Zone	FTE's	General	Clothing & Footwear	Food & Beverage	Household Goods	Motor	Recreation, Sport & Entertainment
6	Aotea	151	7	3	69	6		66
13	Arena	56	6		36		10	4
12	Britomart	59	54		1	4		
3	City Waterfront	446	182	83	75	52	18	36
15	Constitution Hill	17	5		2	2	6	3
11	Eden Crescent	70	10	3	10	7	29	12
5	K Road	154	28	20	31	54		21
4	Nelson	369	32	27	43	175	68	25
1	Old Town	922	68	307	137	82	3	326
16	Port	13			13			
14	University	52	12		3	15	10	13
10	Upper Queen	74			18	2	5	50
8	Viaduct Basin	106	5	9	85	6		1
9	Vincent	95	31	5	15	9	19	16
2	West Side	753	78	340	142	78	4	111

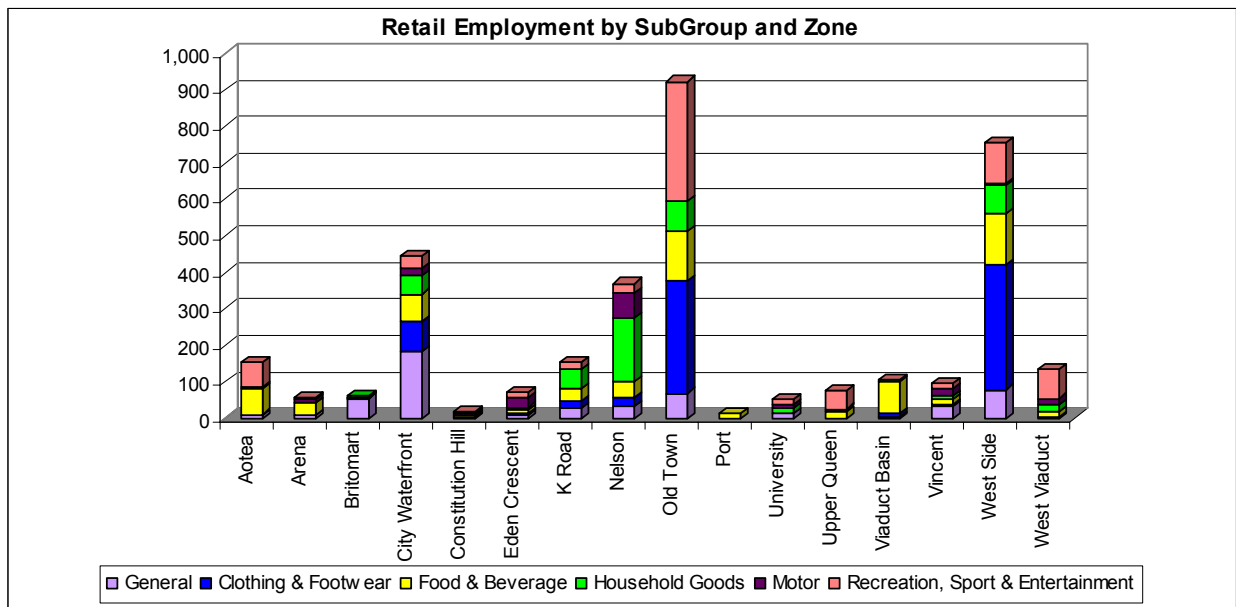


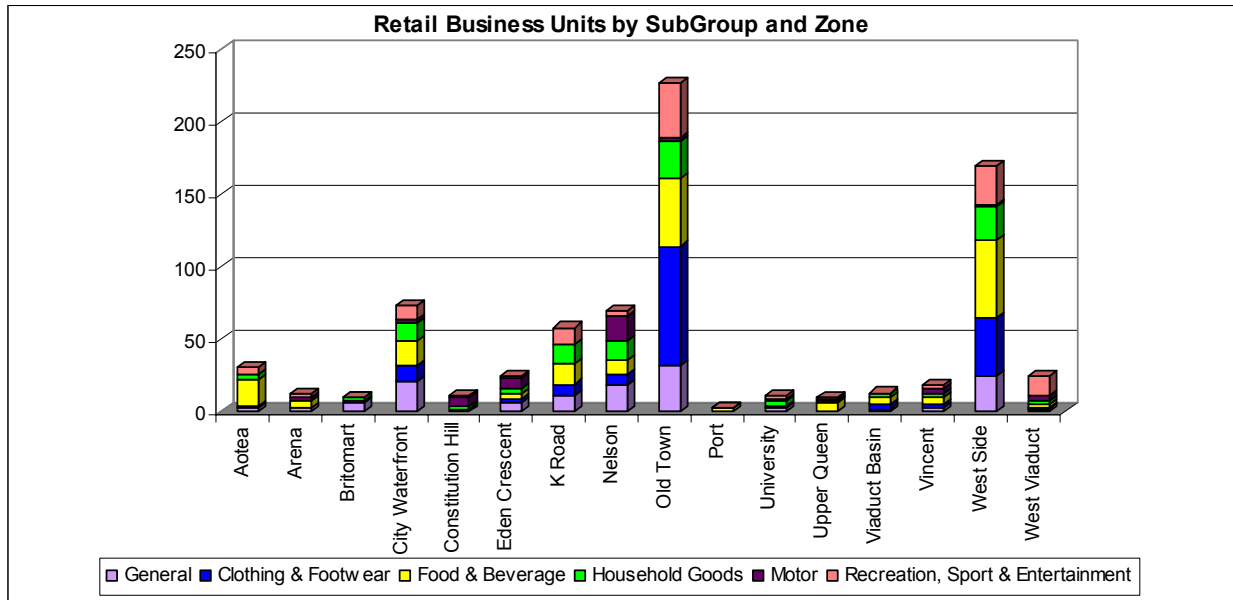
7	West Viaduct	135	2	2	12	20	18	81
	Total	3,472	520	798	689	511	190	765
	% Total		15.0%	23.0%	19.8%	14.7%	5.5%	22.0%

Retail Number of Business Units by Business SubGroup and Zone

Rank	Zone	Bus Units	General	Clothing & Footwear	Food & Beverage	Household Goods	Motor	Recreation, Sport & Entertainment
6	Aotea	31	3	1	18	4		5
11	Arena	12	3		5		2	2
14	Britomart	10	6		1	3		
3	City Waterfront	73	21	11	17	12	3	9
12	Constitution Hill	11	1		1	2	6	1
8	Eden Crescent	24	6	3	3	4	7	1
5	K Road	58	11	8	14	13		12
4	Nelson	70	18	8	9	14	17	4
1	Old Town	227	32	82	47	26	2	38
16	Port	3			3			
12	University	11	3		1	3	2	2
14	Upper Queen	10			6	1	2	1
10	Viaduct Basin	13	2	3	5	2		1
9	Vincent	18	3	2	5	2	4	2
2	West Side	169	24	41	53	23	2	26
7	West Viaduct	25	2	1	2	2	4	14
	Total	765	135	160	190	111	51	118
	% Total		17.6%	20.9%	24.8%	14.5%	6.7%	15.4%

These tables are illustrated in the charts below:





Key Observations

- a) Retail Business Group Employment is most concentrated in Old Town, West Side, which have in excess of 700 Retail FTE's.
- b) The other Zones with significant Retail employment are City Waterfront and Nelson with just over 350 FTE's
- c) The Retail Business Group business units are heavily concentrated in the top two Zones, with over 170 business units. The next three Zones including K Road, have 50 – 60 business units, and all the rest well under 50 business units.
- d) Recreation, Sport & Entertainment retail employment is concentrated in Old Town Zone as well as the main 3 Zones
- e) Clothing & Footwear retail employment is concentrated in the West Side & Old Town Zones. Old Town has more business units, indicating that the West Side outlets ,may be larger on average in terms of employment



An idea of the relative sizes of organisations can be gained by looking at the Average number of Employees per business unit. The following table shows the Average number of FTE's per Business Unit in each of the sub groups across the CBD Zones.

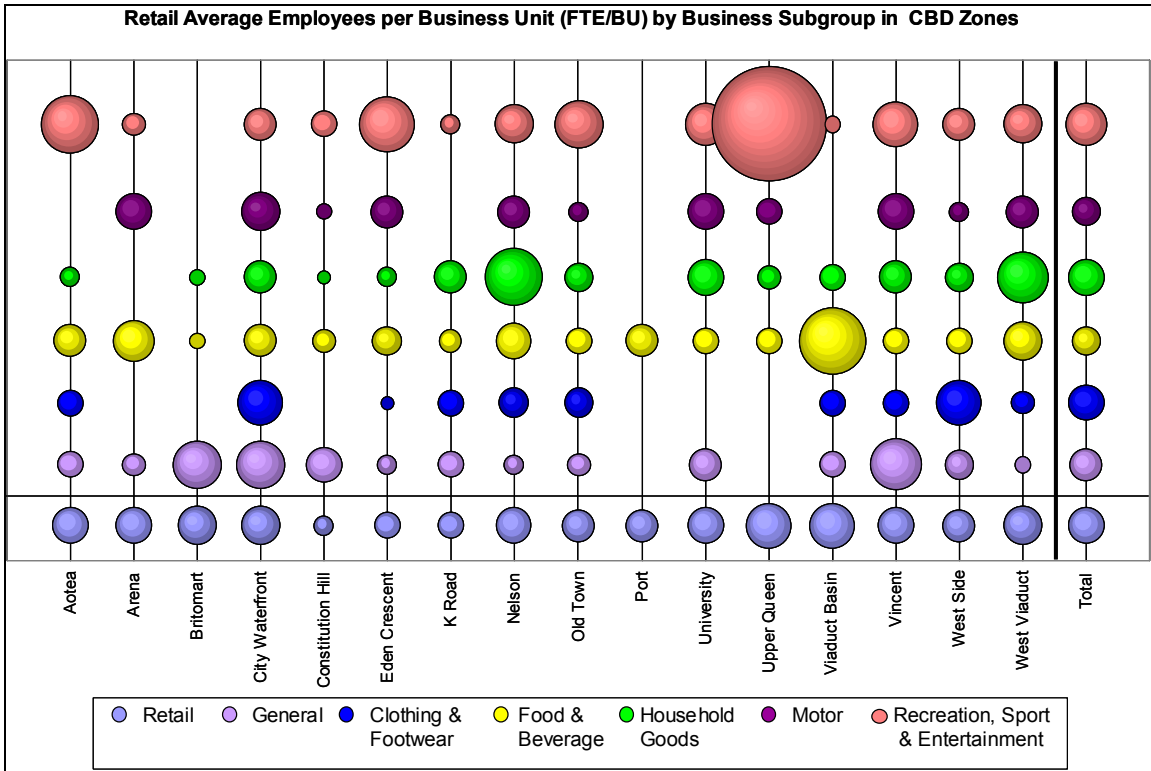
Retail Average Employees per Business Unit (FTE/BU)								
Rank	Zone	Retail	General	Clothing & Footwear	Food & Beverage	Household Goods	Motor	Recreation, Sport & Entertainment
8	Aotea	4.9	2.4	3.0	3.8	1.5	0.0	13.3
10	Arena	4.7	2.1	0.0	7.2	0.0	5.0	2.0
4	Britomart	5.9	9.0	0.0	1.3	1.3	0.0	0.0
3	City Waterfront	6.1	8.7	7.6	4.4	4.3	6.1	4.0
15	Constitution Hill	1.5	5.0	0.0	2.0	0.9	1.0	2.5
13	Eden Crescent	2.9	1.7	0.8	3.3	1.8	4.1	12.0
14	K Road	2.7	2.6	2.4	2.2	4.2	0.0	1.7
6	Nelson	5.3	1.8	3.3	4.7	12.5	4.0	6.3
12	Old Town	4.1	2.1	3.7	2.9	3.1	1.5	8.6
11	Port	4.3	0.0	0.0	4.3	0.0	0.0	0.0
9	University	4.7	4.0	0.0	2.5	4.8	5.0	6.5
2	Upper Queen	7.4	0.0	0.0	2.9	2.3	2.5	49.5
1	Viaduct Basin	8.2	2.5	2.9	17.1	2.9	0.0	1.3
7	Vincent	5.3	10.2	2.6	3.0	4.5	4.8	8.0
5	West Viaduct	5.4	1.0	2.3	5.8	10.0	4.5	5.8
	Total	4.5	3.9	5.0	3.6	4.6	3.7	6.5
	Minimum	1.5	1.0	2.3	1.3	1.3	1.0	1.3
	Maximum	8.2	10.2	7.6	17.1	12.5	6.1	49.5

Observations:

- a) The average size of a Retail business unit in the CBD is 4.5 FTE's
- b) The largest average size is in Recreation, Sport & Entertainment (average 6.5 employees) followed by Clothing & Footwear (5 employees)
- c) Most of the other retail groups employ ;less than 4 FTE's on average
- d) Within these subgroups, there are some variations within the Zones
- e) Recreation, Sport & Entertainment appears to be heavily concentrated in Upper Queen, with 50 employees in one business unit.
- f) Retail employees concentrations appear to be reasonably well-distributed across the Zones



These sizes are shown in the bubble chart or "abacus" below – each bubble represents the average FTE/Business unit for each sub group in each Zone



The chart illustrates the key concentrations of Retail employment in terms of FTE’s per business unit (i.e. implying the presence of larger companies) to be:

- a) Recreation, Sport & Entertainment in Upper Queen
- b) Food & Beverage in Viaduct Basin
- c) Household Goods in Nelson and West Viaduct
- d) Overall, Retail average employment is fairly uniform across both Zones and sub-groups



Transport & Travel

Transport & Travel represents the fourth largest Business Group in terms of employment in the CBD, with 4,749 FTE's in 350 business units. Included in Transport & Travel are Air Transport, Freight Forwarding & Customs, Parking, Rail Transport, Road Transport, Sea Transport and Travel Agents.

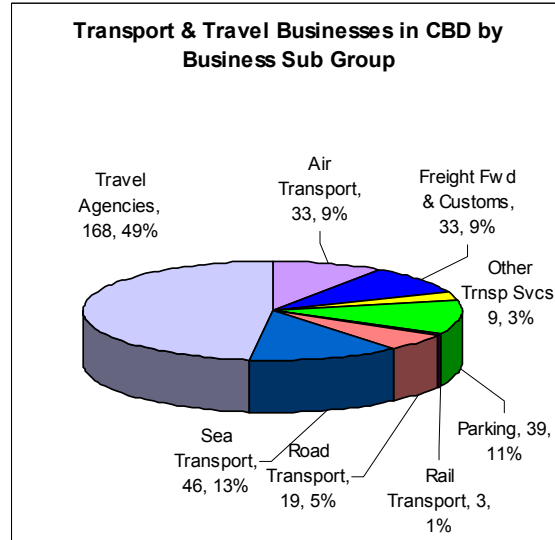
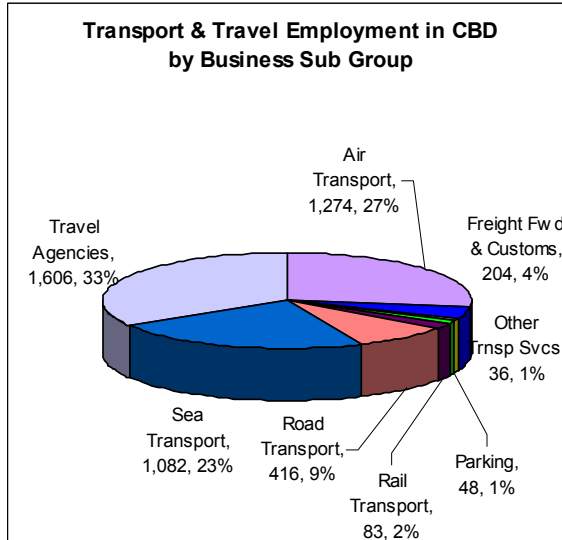
The individual Industry Codes which make up the Transport & Travel Business Group and their assigned sub-groupings are shown in the table below:

Industry Code (ANZSIC6)	Industry Code Description	Business Group	Business Sub Group
I640200	Scheduled Domestic Air Transport	Transport & Travel	Air Transport
I640100	Scheduled International Air Transport	Transport & Travel	Air Transport
I640300	Non-Scheduled Air and Space Transport	Transport & Travel	Air Transport
I664300	Freight Forwarding (except Road)	Transport & Travel	Freight Fwd & Customs
I664400	Customs Agency Services	Transport & Travel	Freight Fwd & Customs
I664200	Road Freight Forwarding	Transport & Travel	Freight Fwd & Customs
I670900	Storage nec	Transport & Travel	Other Trnsp Svcs
I664900	Services to Transport nec	Transport & Travel	Other Trnsp Svcs
I661100	Parking Services	Transport & Travel	Parking
I620000	Rail Transport	Transport & Travel	Rail Transport
I612100	Long Distance Bus Transport	Transport & Travel	Road Transport
I611000	Road Freight Transport	Transport & Travel	Road Transport
I612300	Taxi and Other Road Passenger Transport	Transport & Travel	Road Transport
I661900	Services to Road Transport nec	Transport & Travel	Road Transport
I612200	Short Distance Bus Transport (including Tramway)	Transport & Travel	Road Transport
I630200	Coastal Water Transport	Transport & Travel	Sea Transport
I662900	Services to Water Transport nec	Transport & Travel	Sea Transport
I630300	Inland Water Transport	Transport & Travel	Sea Transport
I630100	International Sea Transport	Transport & Travel	Sea Transport
I662300	Port Operators	Transport & Travel	Sea Transport
I662100	Stevedoring	Transport & Travel	Sea Transport
I664100	Travel Agency Services	Transport & Travel	Travel Agencies

The tables and charts in the following sections break down the Transport & Travel Business Group in the CBD into these sub-groups and show the distribution across the CBD Zones.

Transport & Travel Employment & Business Units by Sub Grouping

The following charts show the breakdown of the Transport & Travel business group in the CBD:



Observations:

- a) Travel Agencies account for the largest proportion of the Transport & Travel Business Group Both in terms of Employment (33% of total) and even more so in terms of Business Units (49% of total)
- b) Air Transport and Sea Transport are the next largest sub groups, both with over 1,000 employees in the CBD
- c) The Travel & Transport sector in the CBD is dominated by these top three sub-groups, with Road Transport being the only other subgroup with any other significant employment – all other subgroups employ less than 100 FTE’s

The distribution of Transport & Travel Employees and Business Units in each of the sub groups across the CBD Zones is shown in the tables below:

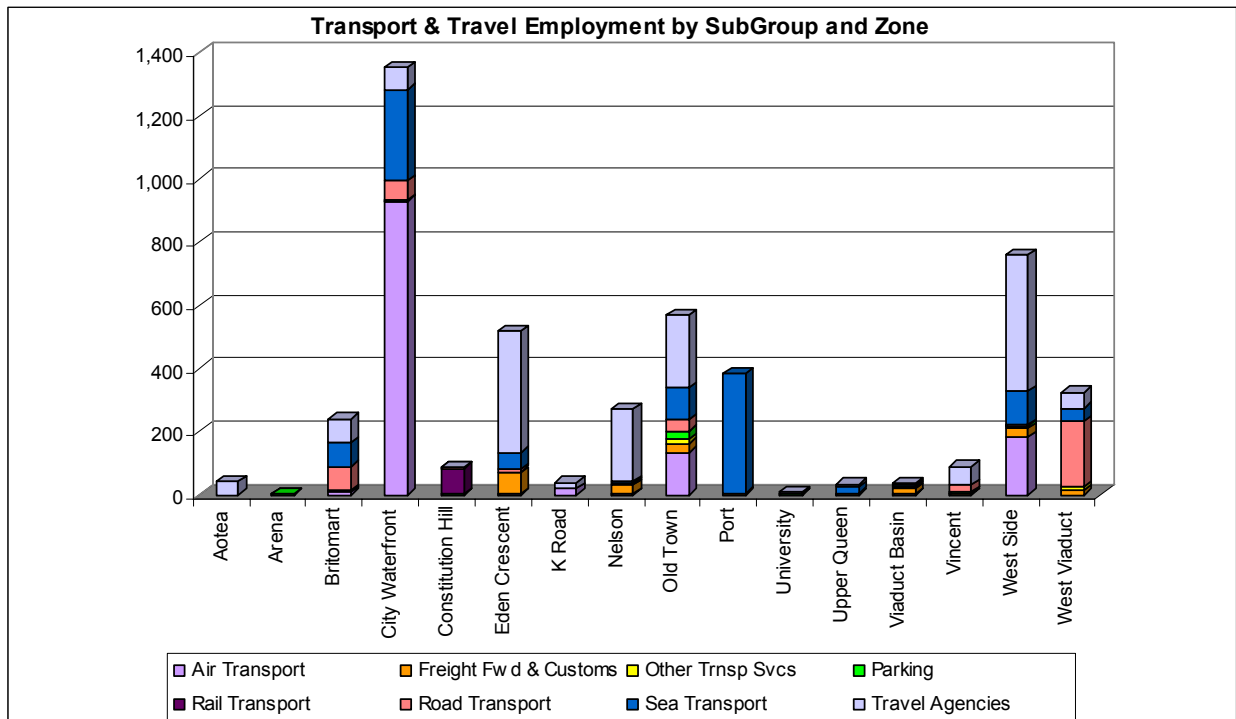
TRANSPORT & TRAVEL Employment by Business SubGroup and Zone (FTE's)

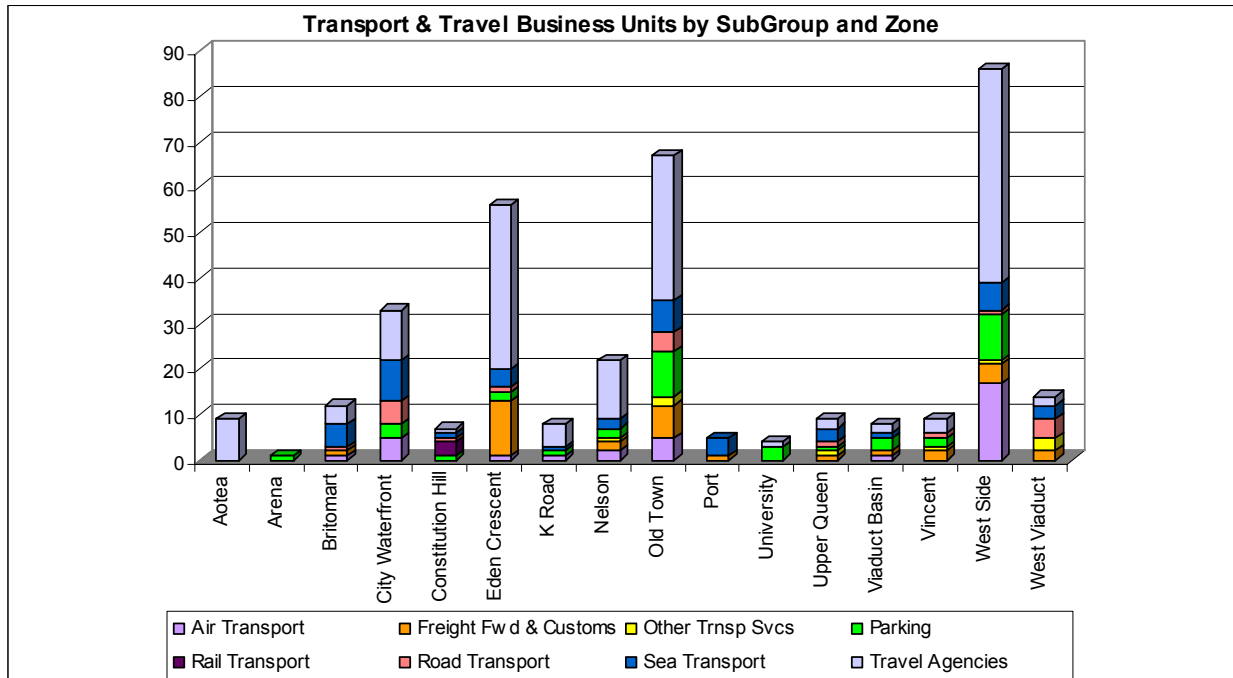
Rank	Zone	Total FTEs	Air Trnsp	Freight Fwd & Customs	Other Trnsp Svcs	Parking	Rail Trnsp	Road Trnsp	Sea Trnsp	Travel Agents
11	Aotea	40								40
16	Arena	1				1				
8	Britomart	241	9	4				76	78	75
1	City Waterfront	1,354	930			2		61	290	71
10	Constitution Hill	87				1	83	1	1	2
4	Eden Crescent	517	0	71		2		9	53	383
12	K Road	38	17			1			1	19
7	Nelson	269	2	28	6	2			6	227
3	Old Town	568	133	29	15	24		34	103	230
5	Port	383		6					378	
15	University	9				2				8
14	Upper Queen	34		1	3	0		0	20	9
13	Viaduct Basin	34	1	20		5			4	5
9	Vincent	89		4	2	2		23		59
2	West Side	759	182	27	2	8		3	109	430
6	West Viaduct	325		15	9			210	41	51
	Total	4,749	1,274	204	36	48	83	416	1,082	1,606
	% Total		26.8%	4.3%	0.8%	1.0%	1.7%	8.8%	22.8%	33.8%

Business Units by Business SubGroup and Zone (FTE's)
TRANSPORT & TRAVEL

Rank	Zone	Total FTEs	Air Transpt	Freight Fwd & Customs	Other Trnsp Svcs	Parking	Rail Transp	Road Transpt	Sea Transp	Travel Agents
8	Aotea	9								9
16	Arena	1				1				
7	Britomart	12	1	1				1	5	4
4	City Waterfront	33	5			3		5	9	11
13	Constitution Hill	7				1	3	1	1	1
3	Eden Crescent	56	1	12		2		1	4	36
11	K Road	8	1			1			1	5
5	Nelson	22	2	2	1	2			2	13
2	Old Town	67	5	7	2	10		4	7	32
14	Port	5		1					4	
15	University	4				3				1
8	Upper Queen	9		1	1	1		1	3	2
11	Viaduct Basin	8	1	1		3			1	2
8	Vincent	9		2	1	2		1		3
1	West Side	86	17	4	1	10		1	6	47
6	West Viaduct	14		2	3			4	3	2
	Total	350	33	33	9	39	3	19	46	168
	% Total		9.4%	9.4%	2.6%	11.1%	0.9%	5.4%	13.1%	48.0%

These tables are illustrated in the charts below:





Key Observations

- a) Transport and Travel businesses are less evenly distributed across Zones and sectors
- b) Transport & Travel Business Group Employment is most concentrated in the City Waterfront Zone, with 1,350 Transport & Travel FTE's
- c) Other key Zones of Transport & Travel employment are West Side, Old Town and Eden Crescent, with between 400 and 800 FTE's
- d) The Transport & Travel Business Group business units are heavily concentrated in the West Side, Old Town and Eden Crescent Zones, all of which have over 50 Transport & Travel business units
- e) City Waterfront's Transport & Travel employment is heavily dominated by Air Transport, being the location of the Air NZ and other airlines
- f) Transport & Travel employment in West Side & Eden Crescent is dominated by Travel Agents
- g) Transport & Travel Sales organisations are concentrated in terms of employment in West Side and the Viaduct Basin & Vincent Zones.
- h) Road Transport Employment is concentrated in the West Viaduct Zones.

An idea of the relative sizes of organisations can be gained by looking at the Average number of Employees per business unit. The following table shows the Average number of FTE's per Business Unit in each of the sub groups across the CBD Zones.

TRANSPORT & TRAVEL		Average Employees per Business Unit (FTE/BU)								
Rank	Zone	Total FTEs	Air Trnspt	Freight Fwd & Customs	Other Trnsp Svcs	Parking	Rail Trnspt	Road Trnspt	Sea Trnspt	Travel Agents
11	Aotea	4.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.4
15	Arena	1.0	0.0	0.0	0.0	1.0	0.0	0.0	0.0	0.0
4	Britomart	20.1	9.0	3.8	0.0	0.0	0.0	75.8	15.5	18.7
2	City Waterfront	41.0	186.1	0.0	0.0	0.7	0.0	12.3	32.2	6.5
5	Constitution Hill	12.5	0.0	0.0	0.0	0.8	27.7	1.3	0.5	1.8



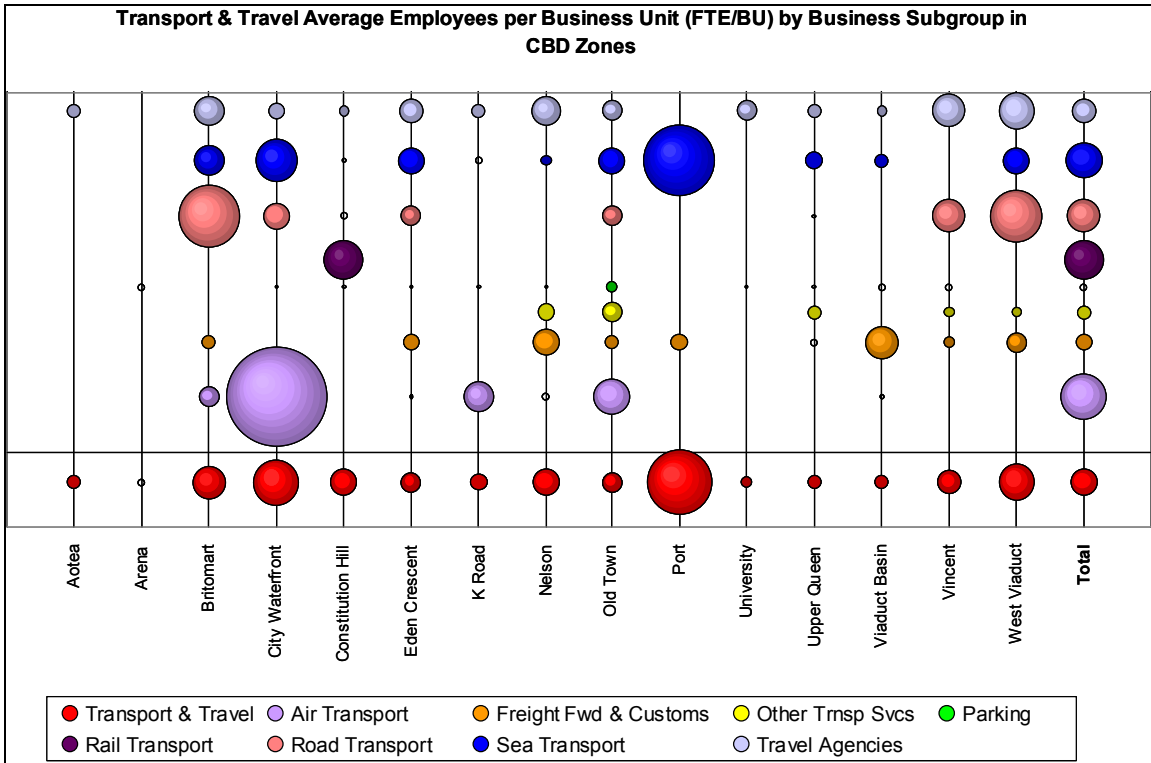
8	Eden Crescent	9.2	0.3	5.9	0.0	0.8	0.0	8.5	13.3	10.6
10	K Road	4.8	17.0	0.0	0.0	0.8	0.0	0.0	1.3	3.9
6	Nelson	12.2	1.0	14.0	5.5	0.8	0.0	0.0	2.8	17.4
9	Old Town	8.5	26.7	4.2	7.5	2.4	0.0	8.5	14.7	7.2
1	Port	76.7	0.0	5.5	0.0	0.0	0.0	0.0	94.4	0.0
14	University	2.3	0.0	0.0	0.0	0.5	0.0	0.0	0.0	7.8
13	Upper Queen	3.7	0.0	1.3	3.3	0.3	0.0	0.3	6.7	4.3
12	Viaduct Basin	4.3	0.8	20.0	0.0	1.5	0.0	0.0	4.0	2.4
7	Vincent	9.9	0.0	2.0	1.8	1.1	0.0	22.8	0.0	19.5
3	West Viaduct	23.2	0.0	7.5	2.9	0.0	0.0	52.4	13.6	25.5
	Total	13.6	38.6	6.2	4.0	1.2	27.7	21.9	23.5	9.6
	Minimum	1.0	1.0	1.3	1.8	0.3	0.0	1.3	0.5	1.8
	Maximum	76.7	186.1	20.0	7.5	2.4	27.7	75.8	94.4	25.5

Observations:

- a) The average size of an Transport & Travel business unit in the CBD is 13.6 FTE's, with a maximum of 76.7
- b) The largest average size is in Air Transport (average 39 employees) followed by Rail Transport (28 employees)
- c) Road & Sea Transport organisations employ an average of 22 and 23 FTE's respectively
- d) City Waterfront shows a relatively high concentration of Sea Transport – note that the large meshblock which covers the City Waterfront includes part of the Port area (See maps of Quarters & Zones in Section 4)
- e) Within these subgroups, there are significant variations within the Zones
- f) Rail Transport has employees in only one Zone, Constitution Hill, with 28 FTE's/Business unit.
- g) Travel Agencies ranges from 1.8 in Constitution Hill to 26 in West Viaduct
- h) Parking generally shows a low level of employment per business unit



These sizes are shown in the bubble chart or "abacus" below – each bubble represents the average FTE/Business unit for each sub group in each Zone



The chart illustrates the key concentrations of Transport & Travel employment in terms FTE's per business unit (i.e. implying the presence of larger companies) to be:

- a) Air Transport in the City Waterfront
- b) Sea Transport in Port
- c) Road Transport in Britomart and West Viaduct
- d) Overall Transport & Travel in Port and City Waterfront
- e) The subgroups of Air Transport, Rail, Road and Sea show larger average sizes than the other sectors.