



# Auckland City CBD social and cultural development research

May 2003  
New River Ltd.





# Objectives

- Understand how the CBD is currently used
- Develop area maps of CBD use at different times of the day and week
- Understand how the CBD is currently perceived by people
- Develop a model showing which factors affect use or enjoyment of the CBD
- Develop short term (2003 – 2005) strategic recommendations based on research results



# Methodology

In-depth  
Interviews



Phone Survey  
(face to face: overseas tourists)

40 face to face interviews. 4 x interviews with overseas tourists, 4 x non-Aucklanders, 24 x Aucklanders (from across the region) across different activity segments (see sample for breakdown), 8 x interviews with marginal groups

Quantitative survey of 668 people. Results represent the general view of people who use the CBD. The sample allows representative drill-downs into a number of different segments



# Executive summary



# High-level findings

Key high-level findings are:

- (1) CBD moderately well perceived and used  
- with many opportunities to do better
- (2) People factors will drive enjoyment and use up  
- physical factors facilitate, not predict it
- (3) Leadership necessary to realize improvement  
- unlikely to happen just by market alone



# Summary: CBD use

## Diverse pattern of CBD use:

- Some areas more specialized other general use .
- However all areas contain business use and recreational use
- Tourism and education areas tend to be in more select pockets

## Variable activity concentrations:

- Areas nearer the water heavily used
- Other areas comparatively little use

## Who using different areas:

- No significant demographic difference in use of different areas beyond age
- Popular tourists spots are the Viaduct, Aotea, the Waterfront and Westside

## When different areas are used

- Most areas active both during the day and night
- Although the activity and people using them are different
- Most business during the day, not at night. The reverse is true for recreation.



# Summary: CBD enjoyment

- CBD enjoyment rates on average 6 out of 10
- The majority of people do not identify with the CBD
- CBD atmosphere rates 6 out of 10
- The CBD's private attractions rate highest
- Social and cultural aspects rate in the middle
- Infrastructure aspects the lowest.
- Events in the CBD rate in the middle (6.37 out of 10)
- Locals who enjoy the CBD least are non-users
- Tourists rate the CBD the very highest at 8 out of



## Summary: factors linked to CBD enjoyment

- Common denominators driving CBD enjoyment are:
  - change of scene
  - atmosphere of the CBD
  - being able to identify with the CBD
  - being able to walk outdoors
- There are also idiosyncratic factors, dependent on segment driving CBD enjoyment. Examples:
  - number of public toilets for shoppers
  - friendliness of people for recreational users
  - safety for tourists
  - the multi-cultural feel for students
  - events for accommodation users
- Infrastructure factors have weakest links to enjoyment
- “People”-type factors stronger links to CBD enjoyment



## Summary: Strategic recommendations

Strategic recommendations cut across all aspects of city governance: infrastructure, economic, and social/cultural. A CBD people enjoy, and would like to use more, is clearly a function of all these areas working well in unison.

Specific recommendations are:

- Address under developed quarters
- Achieve better balances within quarters
- Amplify existing positives across different quarters
- Develop stronger linkages between quarters
- Align Auckland City actions with users' perspectives
- Take care of low performance aspects
- Assume a leadership role in high potential areas
- Development of outside walking quarters for recreation and shopping
- Establish a presence for minority groups with a critical mass of activity
- Reflect diversity of CBD stakeholders, in non-conflicting ways



# Summary: Minorities

Minority group issues vary by group:

- Pacific Islanders feel underrepresented in the CBD
- Gay/lesbian/transsexual need socializing places
- Asian people need better safety

Common denominators:

- Emergency accommodation, showers and healthcare for the homeless and for prostitutes
- Validation. All minorities request validation or places that identify with them in the CBD



# Sample



# User sample

## Primary activity

	Frequency	Valid Percent	Cumulative Percent
Valid			
Shopping	110	19.0	19.0
Recreation or leisure or dining	146	25.2	44.1
Live or stay in town	137	23.6	67.8
Education	86	14.8	82.6
For business activities or work	101	17.4	100.0
Total	580	100.0	
Non-users	88		
Total	668		

580 people who primarily use the CBD for shopping, recreation, accommodation, education or commercial purposes

## Do you use or visit Auckland's central city area?

	Frequency	Valid Percent	Cumulative Percent
Valid			
Yes - CBD user	580	86.8	86.8
No - CBD nonuser	88	13.2	100.0
Total	668	100.0	
Missing			
System	3		
Total	671		

88 people from the Auckland region who are non-CBD users



# Geographic sample

## Auckland, non-Aucklander, or overseas Tourist

		Frequency	Valid Percent	Cumulative Percent
Valid	Yes - Aucklander	505	75.6	75.6
	No - Non Aucklander	87	13.0	88.6
	Tourist	76	11.4	100.0
	Total	668	100.0	
Missing	System	3		
Total		671		

505 Auckland region people, 87 non-Aucklanders (from the 09 area code) who visit the Auckland CBD, and 76 foreign tourists visiting Auckland

## Which zone best describes where you live? \* s3 Do you live in Auckland? Crosstabulation

	s3 Do you live in Auckland?	Total
	Yes - Aucklander	
Auckland City Zone	59.7%	59.7%
Franklin & Districts	1.3%	1.3%
Manukau City & Districts	12.3%	12.3%
North Shore City	15.7%	15.7%
Papakura & Districts	2.5%	2.5%
Rodney	1.9%	1.9%
Waitakere City & District	6.7%	6.7%
Total	100.0%	100.0%

59.7% from Auckland City. Remainder from other Auckland region. 3% overlap into Rodney and Franklin zones





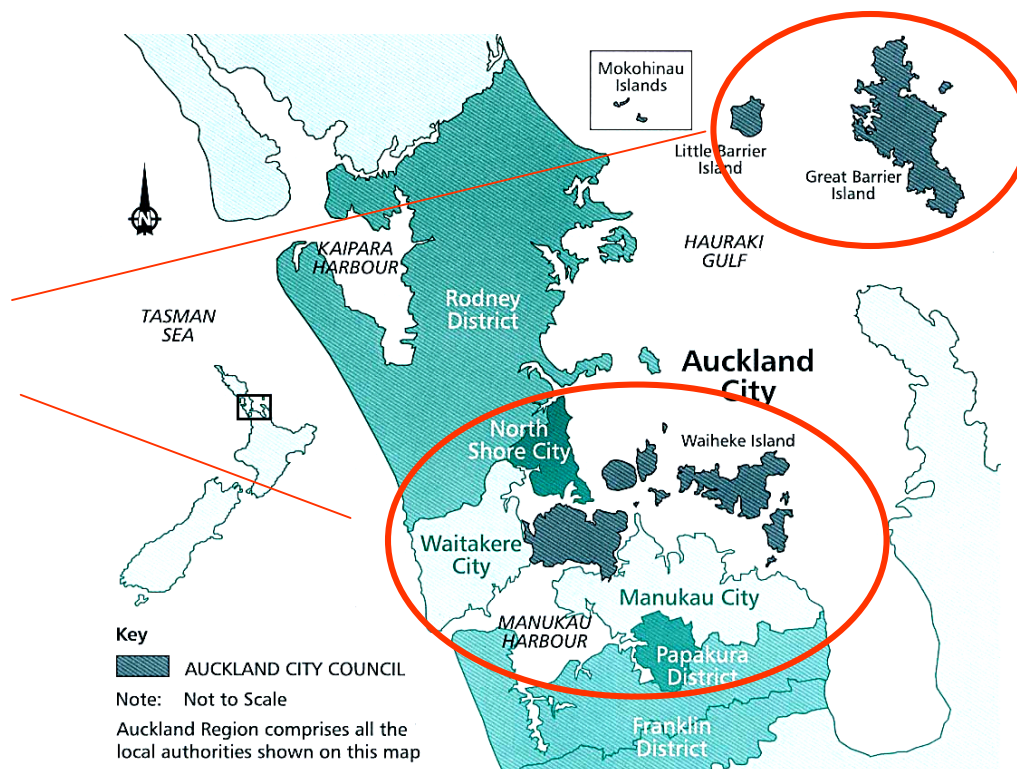
# Area represented by the survey

## Aucklanders

- Representative of Auckland region
- 1.1 million people (per statistics NZ)
- The sample had a small overlap with Rodney and Franklin

## Overseas tourists and non-Aucklanders

- Indicative of others who visit the Auckland CBD
- Of the 1.1. million 14,000 people per day are CBD tourists and non-Aucklanders visiting the CBD (per statistics NZ)
- Non-Aucklanders sampled from 09 area codes
- Tourists sampled from those currently in the CBD

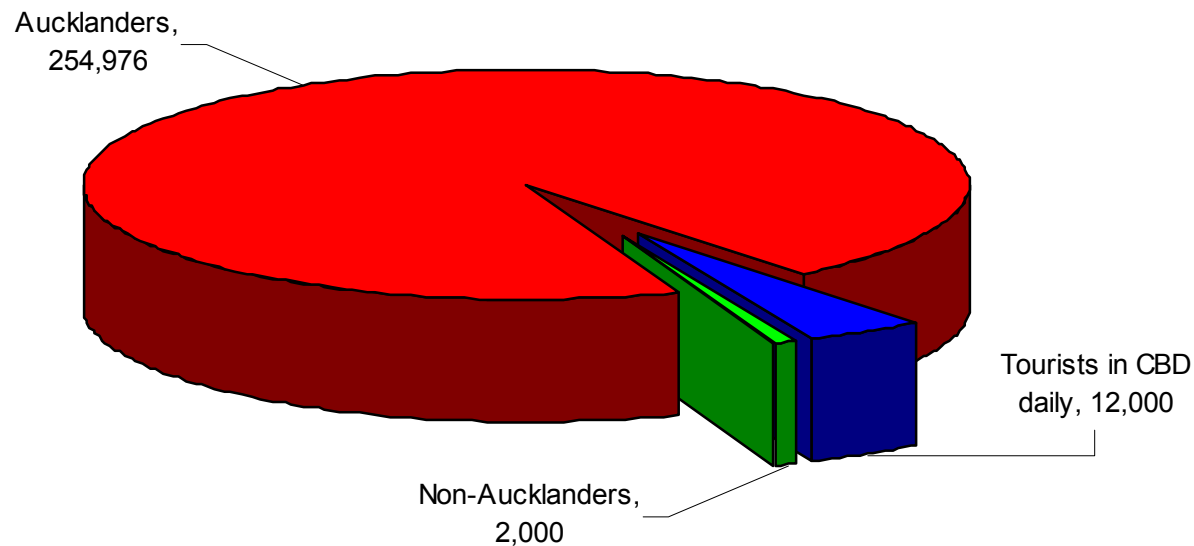




# CBD use



## Use of Auckland CBD

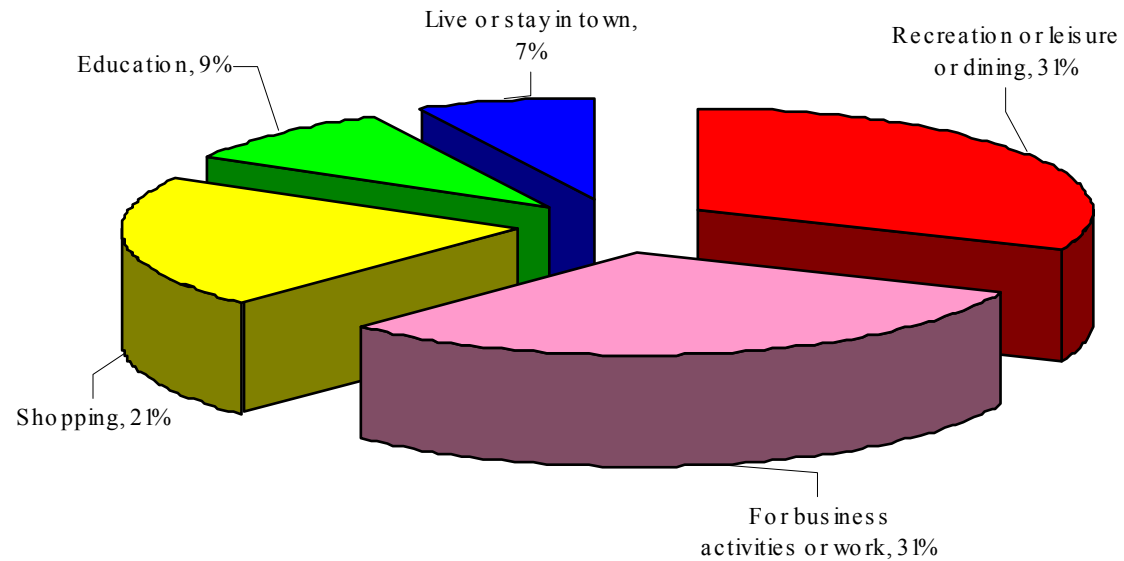


In any one day of the 1.1 million people in the Auckland region: 269,000 use the CBD. 255,000 Auckland region people, 12000 tourists, and 2,000 non-Aucklanders. 152,000 Auckland region people are likely to use the CBD less than once a year.



# Why people use the Auckland CBD

Primary reason for visiting the CBD

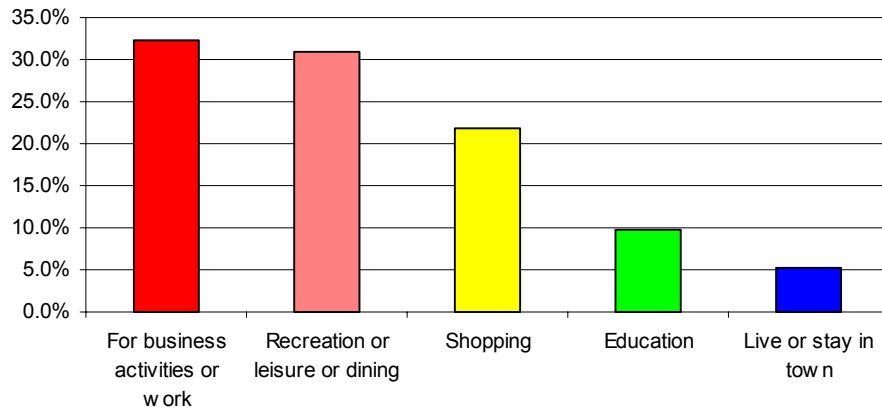


31% of people visit the CBD primarily for commercial purposes. 31% for recreation, 21% for shopping, 9% for education, and 7% for accommodation

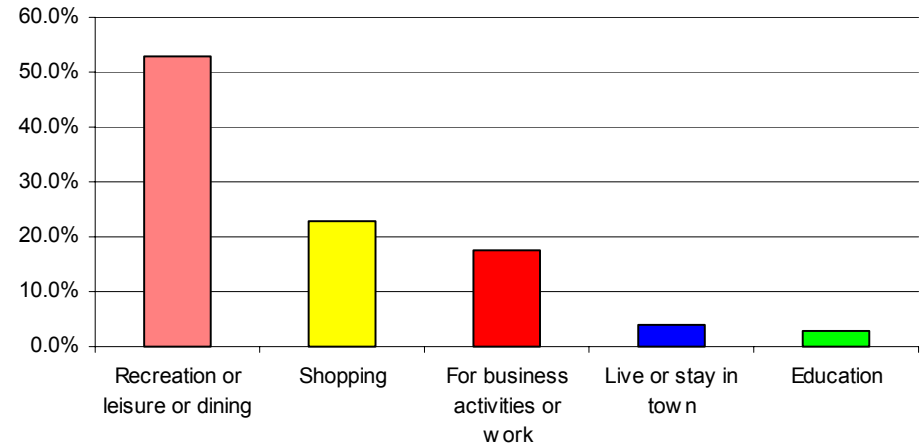


# Why people use the Auckland CBD

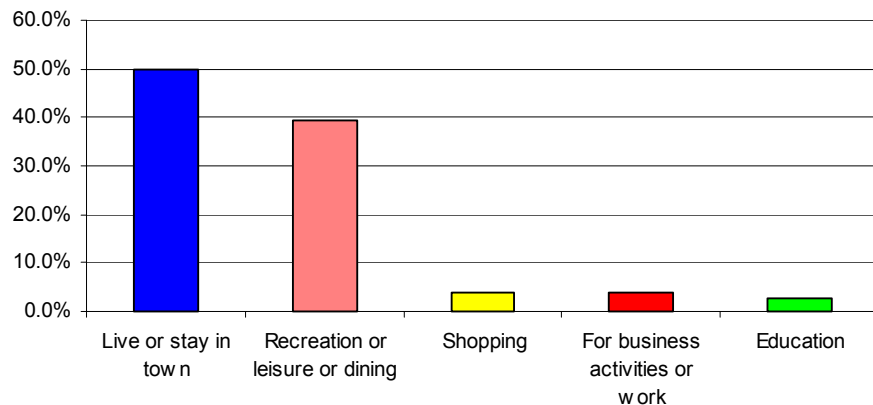
### Auckland region people



### Non-Aucklanders (09 area code)



### Tourists

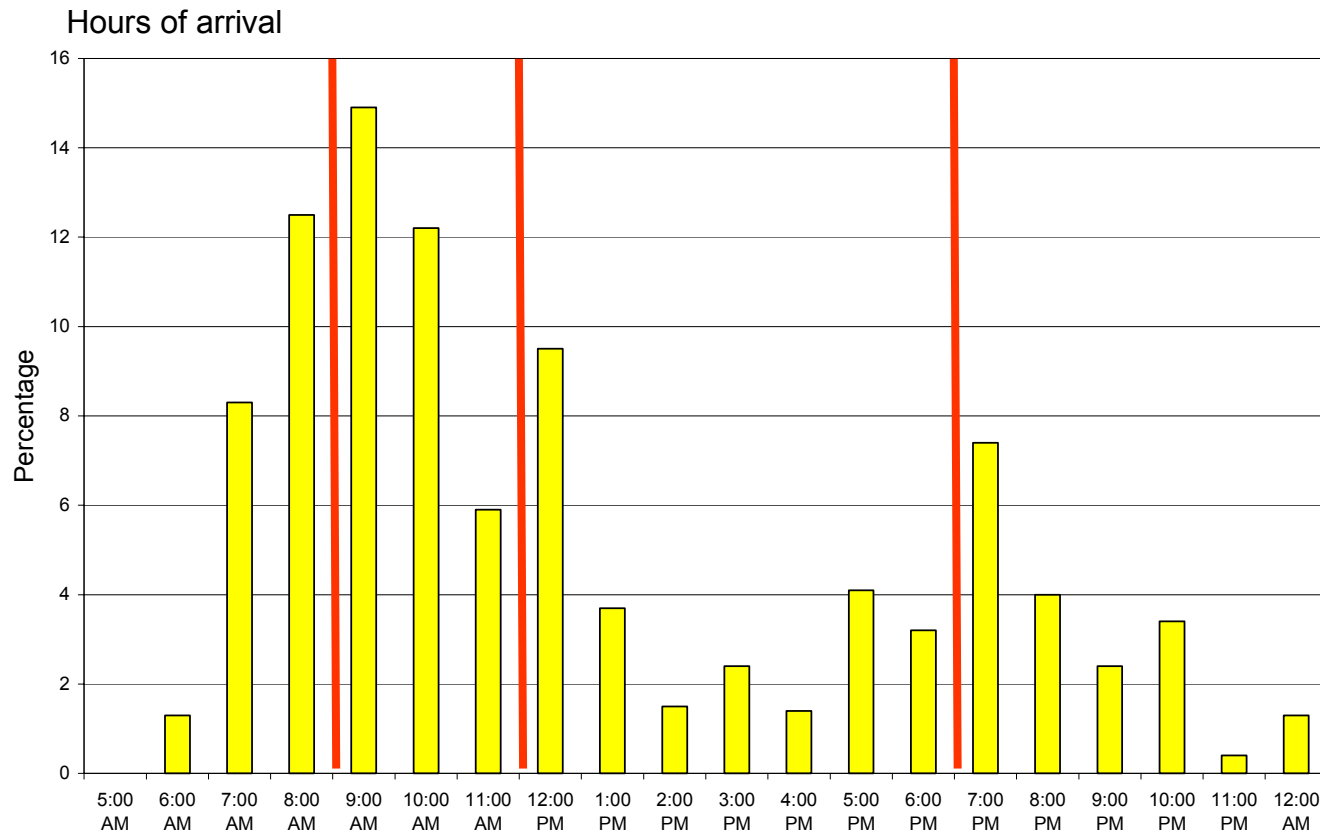


However, usage patterns do vary significantly between Aucklanders, non-Aucklanders, and Tourists. Commercial use is the main use for Aucklanders, accommodation for tourists, and recreation and leisure for non-Aucklanders.





# When people use the CBD

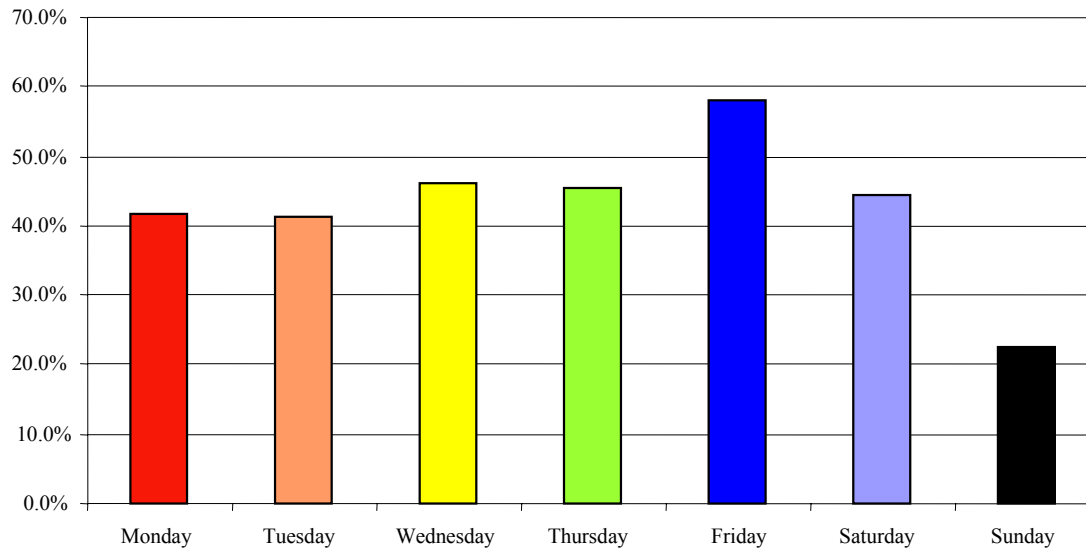


A clear pattern emerges of a morning bulge in arrivals, another peak at midday, a quiet afternoon, and a new set of arrivals in the evening



# When people use the CBD

Days of use

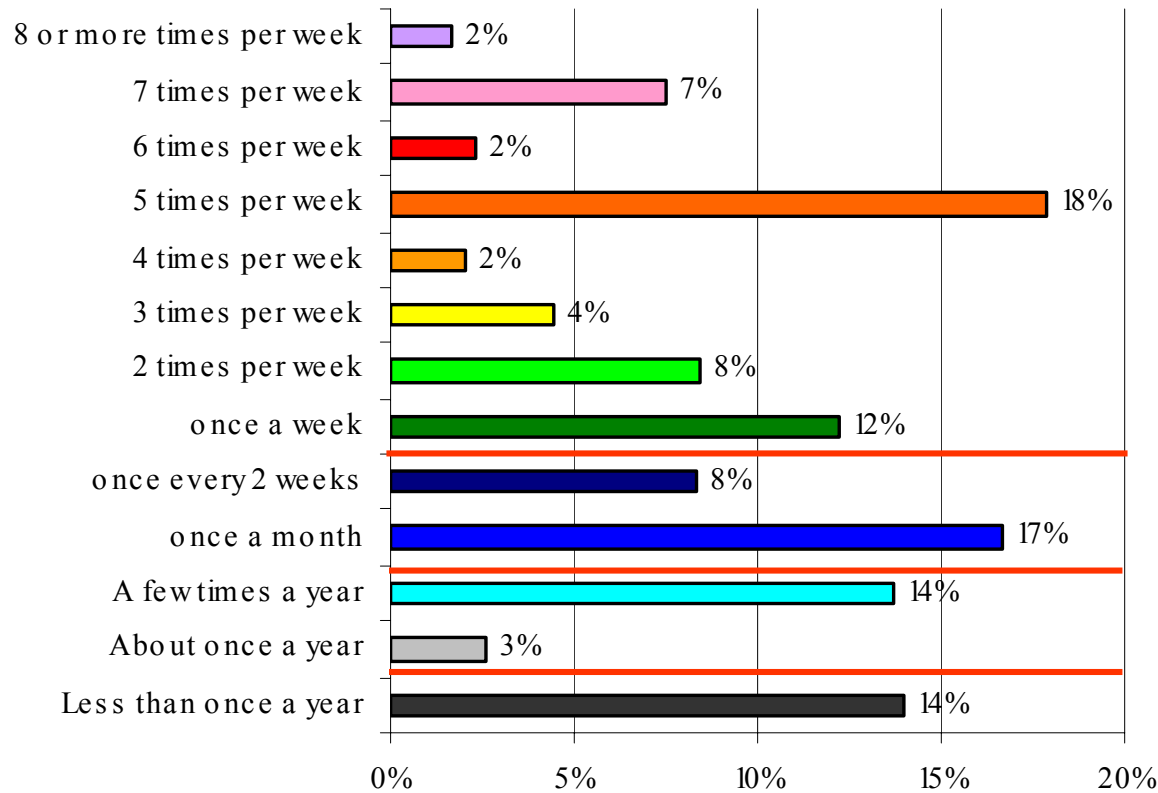


Usage is more or less even Monday to Thursday. It then peaks with highest usage occurring on Friday. On Sunday usage drops off to the lowest point of the week



# When people use the CBD

Frequency of CBD visits



4 distinct groups of users based on frequency of visits to the CBD. 56% visit the CBD at least weekly. Another 25% visit the CBD at least once a month but less than once a week. 17% visit the CBD at least once a year. Non-users are 14% who say they visit the CBD less than once year.

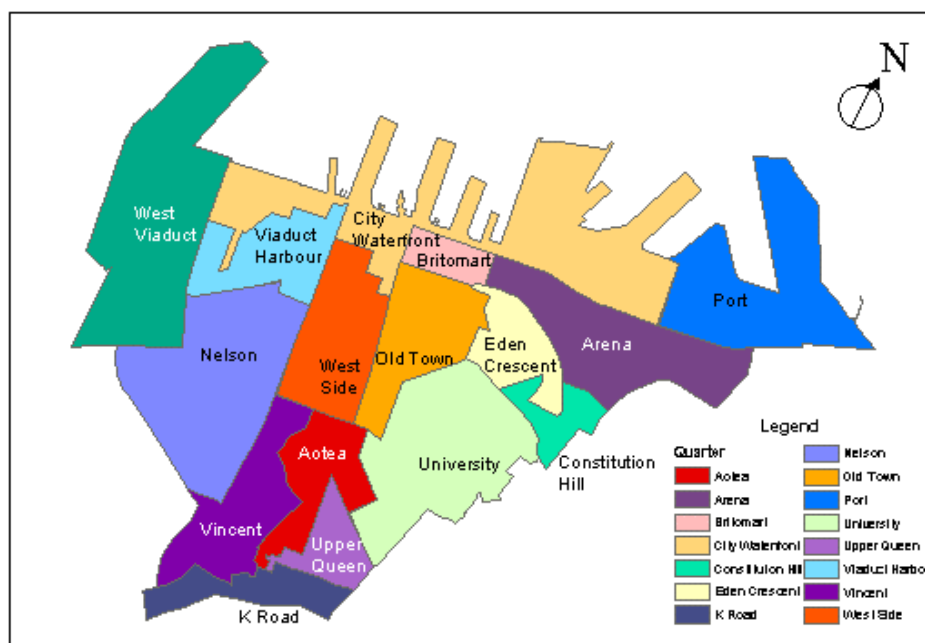


# Areas of CBD used

CBD divided into 13 geographic precincts for the purposes of this work



- Viaduct
- City Waterfront
- Port
- Britomart
- Emily Place
- University
- Old Town
- West Side
- Nelson
- Vincent
- Aotea
- Upper Queen
- K Road



CBD Quarters

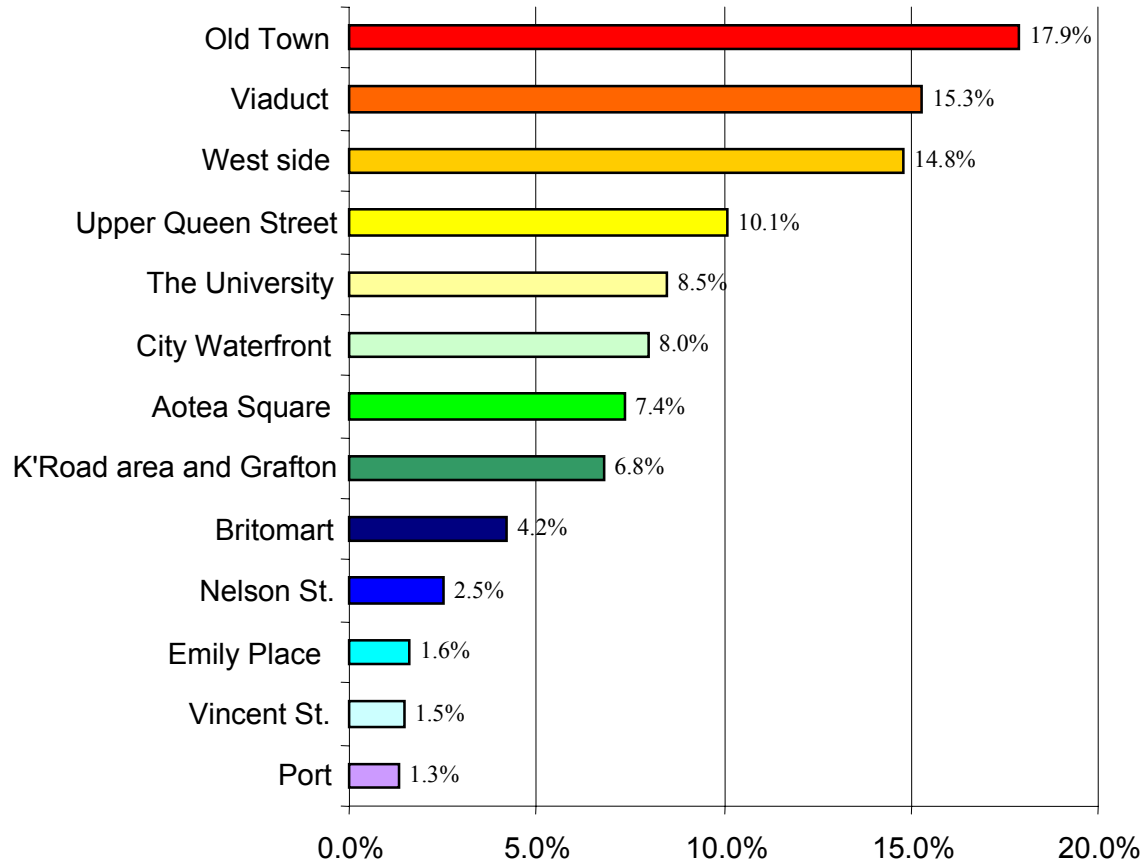
Map prepared by BENTLEY CONSULTANTS LTD using data provided by New Ebor Ltd





# Areas of CBD used

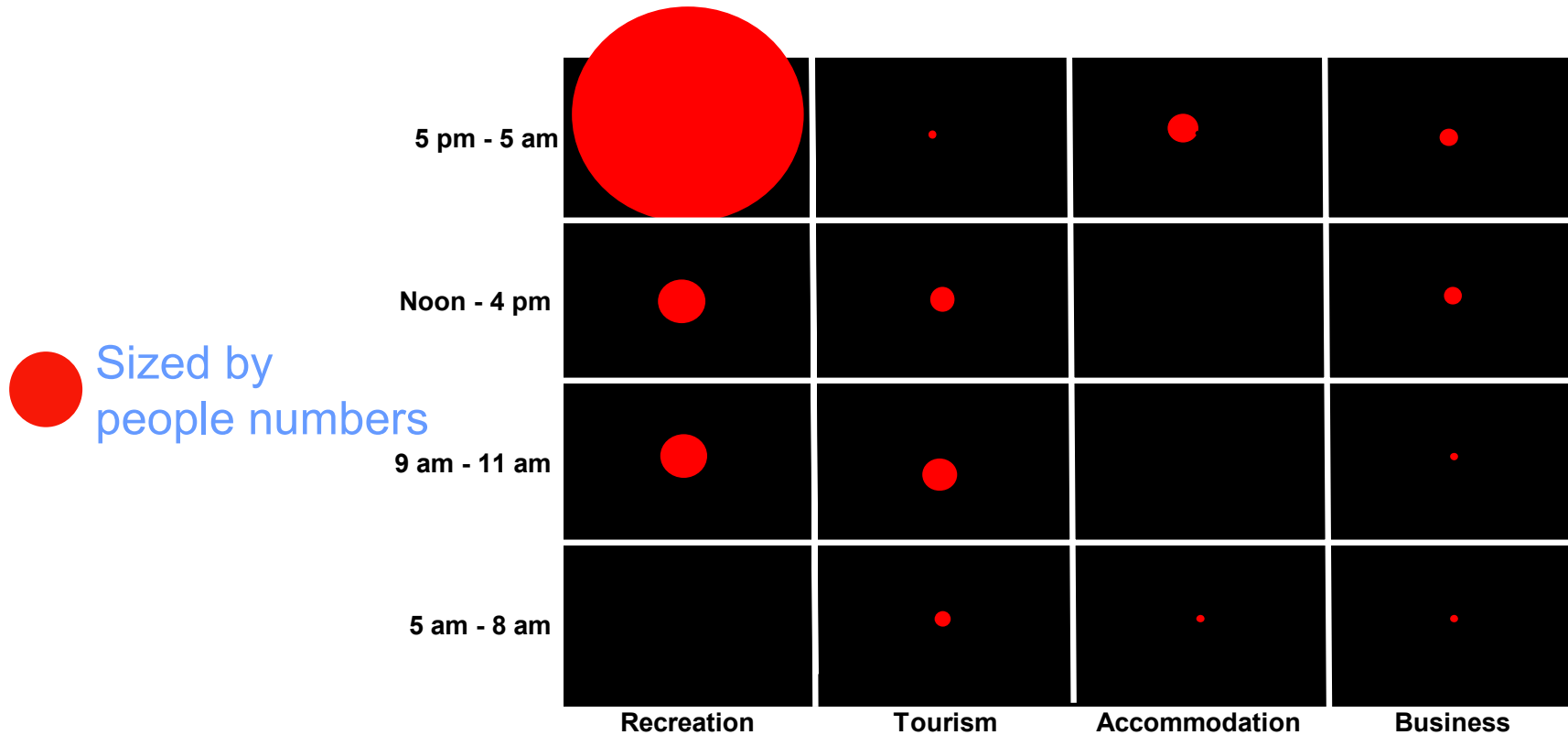
Areas people usually visit



Highly frequented areas of the CBD as one might expect. Queen Street areas (Old Town and Westside) are 2 of the top 3 areas. Viaduct is also pointed out as an area that 15.3% of people most usually visit. Areas frequented by few people 1-2%, are the Port Vincent Street, Emily Place and Nelson Street.



# Viaduct usage times and activities



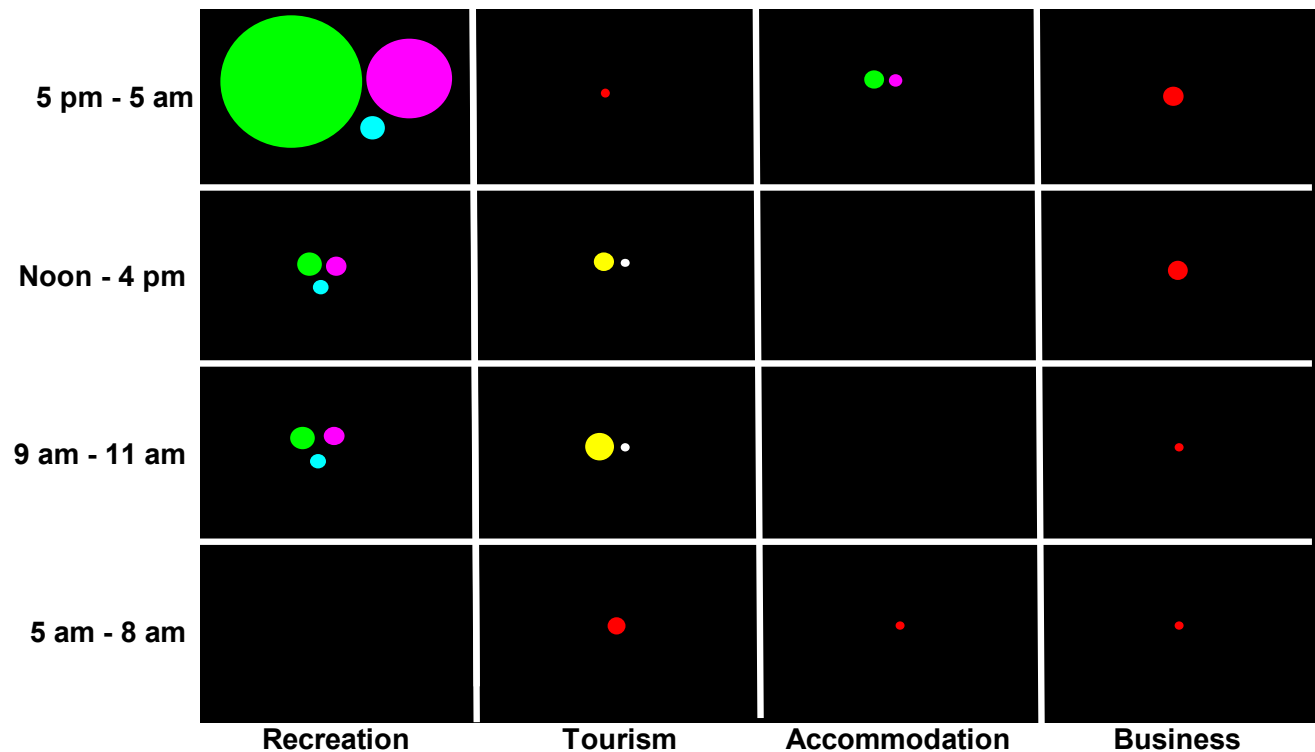
Of the 41,000 people visiting the Viaduct:

- Recreation by Aucklanders, largest group using Viaduct 5pm to 5 am average 18,000 people
- Tourists, next biggest group, peaking from 9 am – 11 am with 3,000 going through
- Accommodation third biggest group with 1,500 people in the evening and nighttime
- Commercial, fourth biggest group with 1,400 workers from noon through until late



# Viaduct usage by whom

- Aucklanders
  - 18 to 35 year olds
  - 36 to 55 year olds
  - 56 year old +
- Overseas Tourists
- Non-Aucklanders



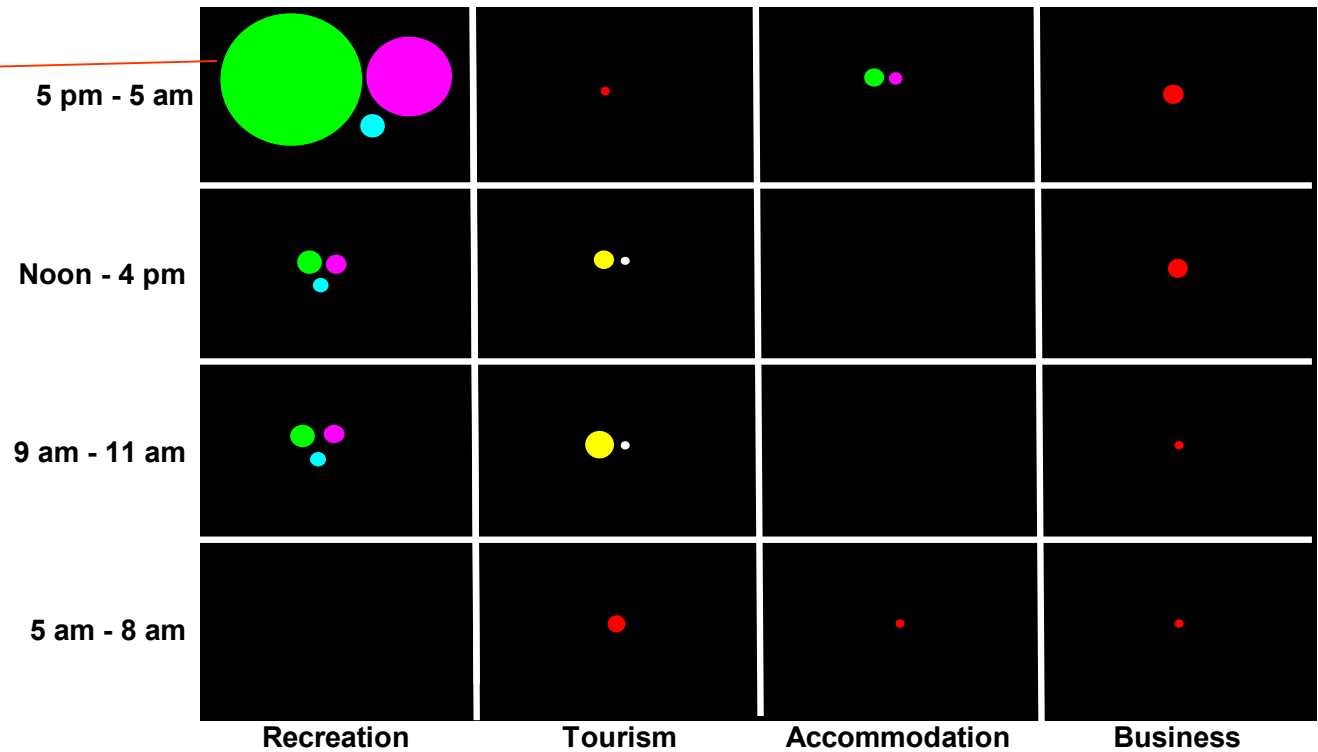
Most frequent users of the Viaduct are the 18 to 35 year olds, with highest usage period in the evening made of 56% of this age group. At this time 36 to 55 year olds make up 34% of people using the area, and 10% are 55+. During the day those patterns even out between younger and middle aged people. In Tourism most are foreign tourists although there are a number of non-Aucklanders frequenting the area.



# Viaduct usage by detailed activity

## Key activities

- Enjoy sights and sounds
- Night life
- Bars
- Shopping
- Dining
- Walking around

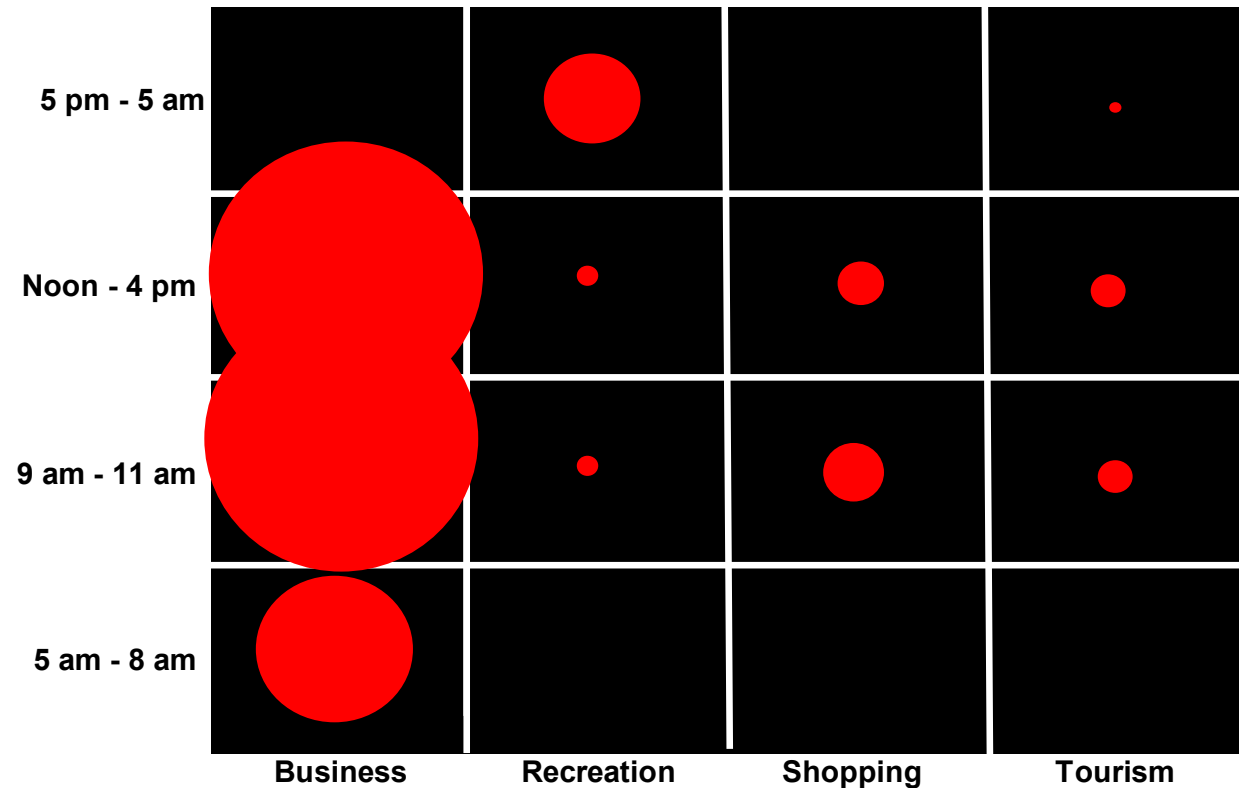




# Waterfront usage times and activities

 Sized by people numbers

Note: Waterfront and Port areas combined. Ports have numbers too small to report separately in area maps.



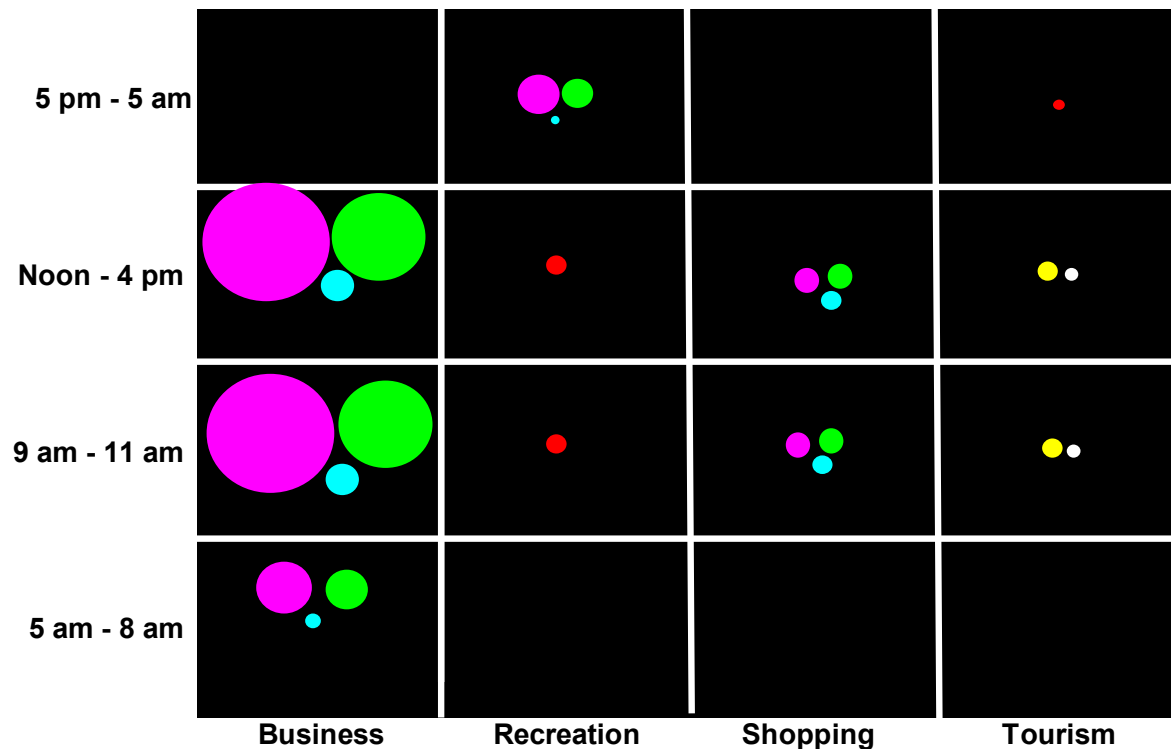
Of the 25,000 people visiting the Waterfront and Port areas:

- Largest group is business use during the day from 5am to 5 pm people, 14,000 people
- Recreation in the evening the next largest group use averaging 4,700 per day
- Shopping and Tourism are the other main uses, with combined numbers of 6,000 per day



# Waterfront usage by whom

- Aucklanders
  - 18 to 35 year olds
  - 36 to 55 year olds
  - 56 year old +
- Overseas Tourists
- Non-Aucklanders



Most frequent users of the Waterfront are the 36 to 55 year olds, with highest usage period during the day for made up of 47% of this age group. At this time 18 to 35 year olds make up 36% of people using the area, and 13% are 55+. During the evening a slightly more even pattern between the middle age and younger groups, still with older people being the minority



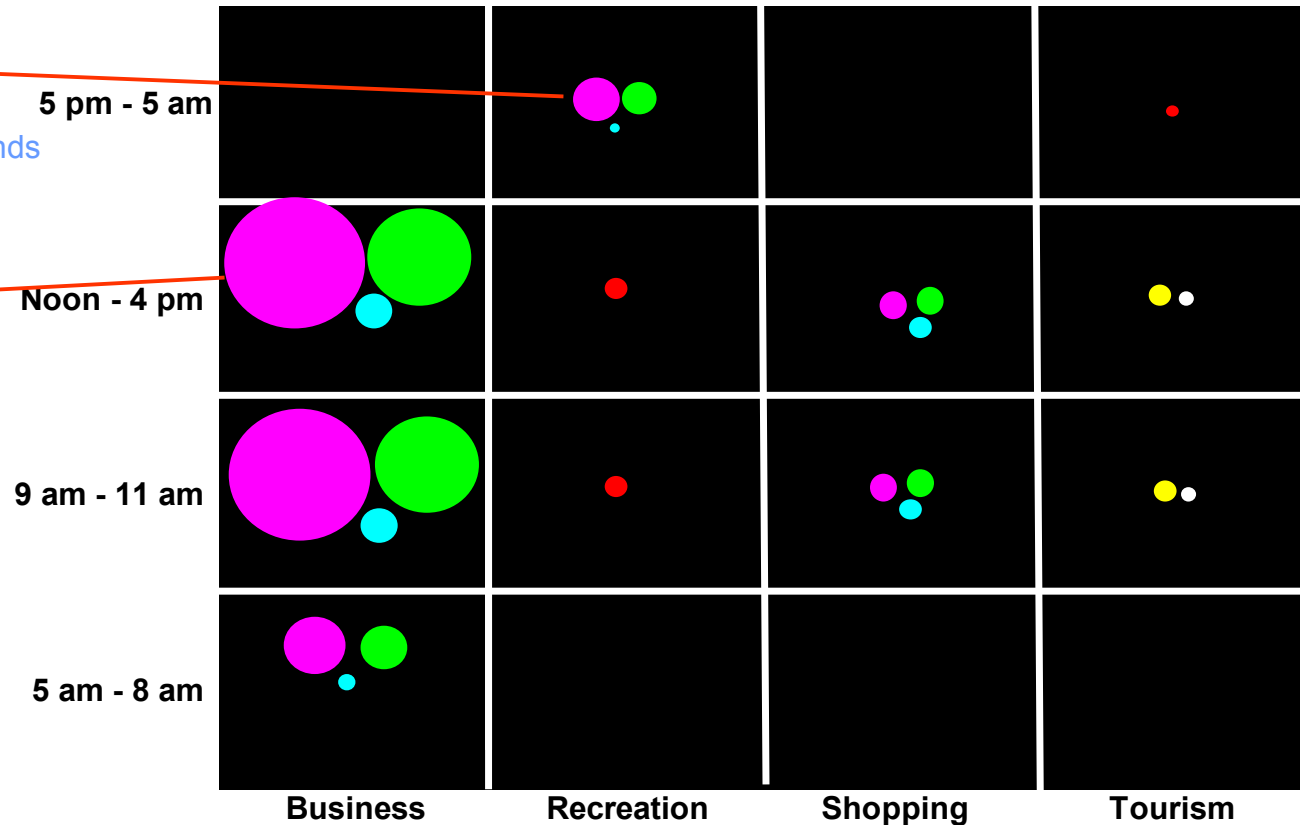
# Waterfront usage by detailed activity

## Key activities

- Night-life
- Enjoy the sights and sounds
- Clubs
- Have a drink in bars

## Key activities

- Work
- Business

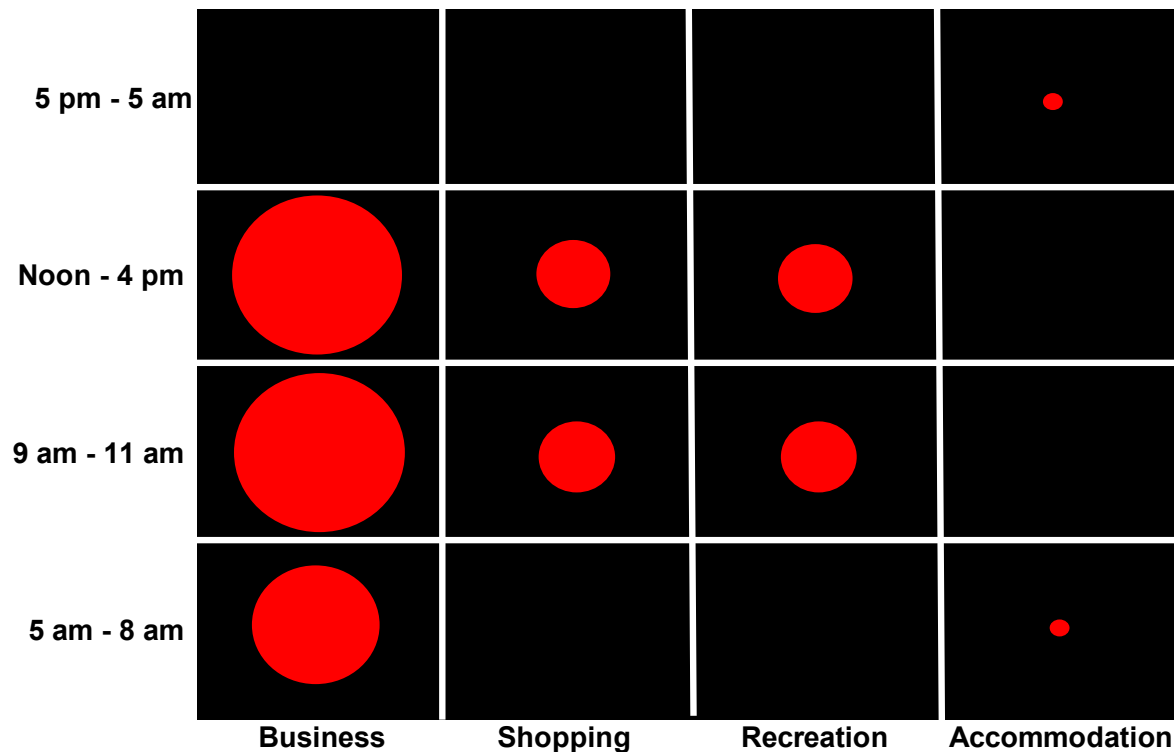




# Britomart usage times and activities

 Sized by people numbers

Note: low sample numbers for this map, 18 people of the 668 total. Mapping only indicative for this area



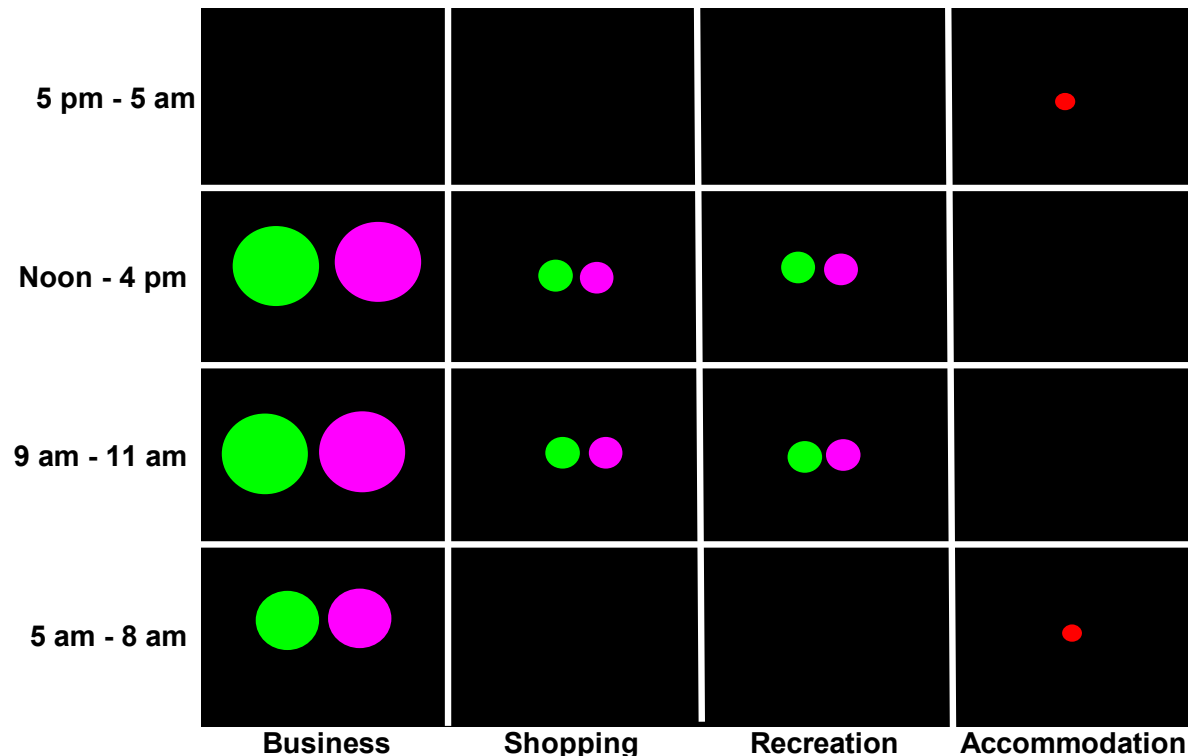
Of the 11,000 people visiting the Britomart area each day:

- Largest group is business use during the day from 5am to 5 pm, around 5,600 people
- Shopping and recreation during the day are other uses, 1 – 2000 people per day each, also small numbers (in the hundreds) are accommodation use



# Britomart usage by whom

- Aucklanders
  - 18 to 35 year olds
  - 36 to 55 year olds
  - 56 year old +
- Overseas Tourists
- Non-Aucklanders



Even split between younger and middle aged people in using the Britomart area. No tourists mention Britomart as the primary area they are visiting. Also no older people mentioned the Britomart as their primary area of CBD use.



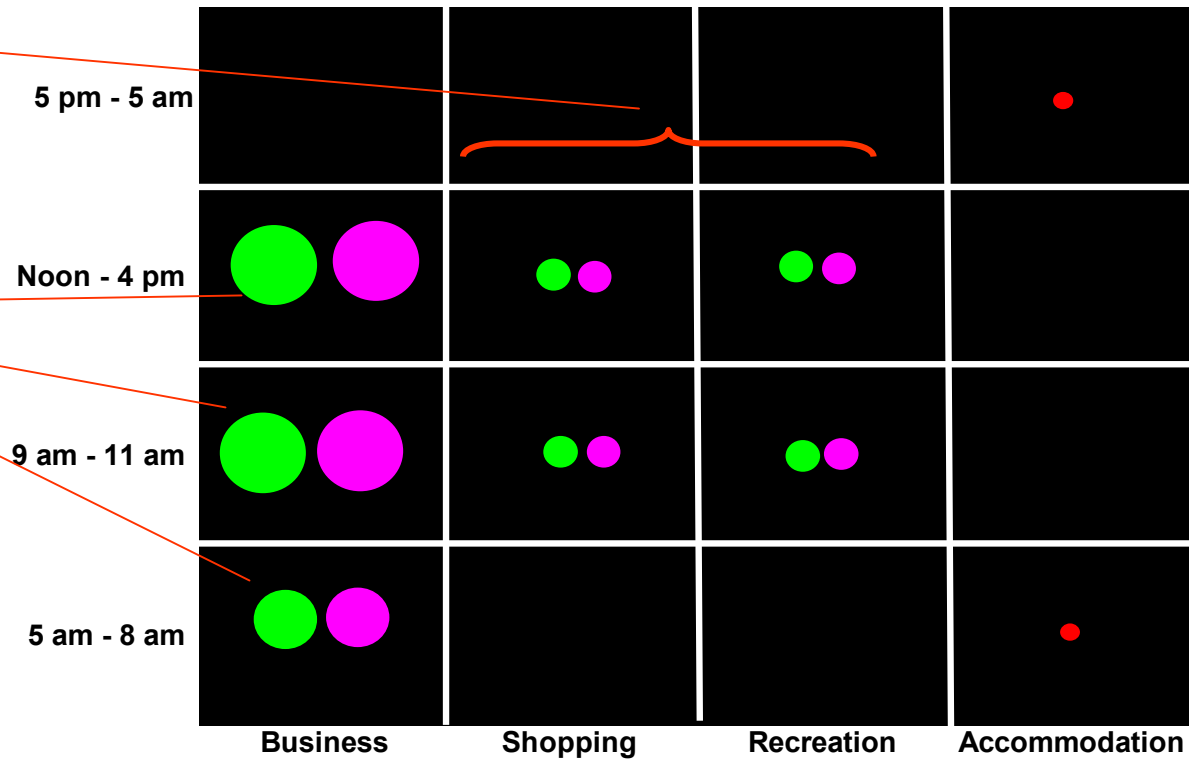
# Britomart usage by detailed activity

## Key activities

- Shopping
- Have a drink in bars
- Passing through

## Key activities

- Work
- Business





# Emily Place usage and activities

## EMILY PLACE

### Visiting per day

Aucklanders	4080
Non-Aucklanders	0
Tourists	0

TOTAL 4080

Primary visit area for survey respondents 10

Note: sample numbers too low for an accurate area map for this area

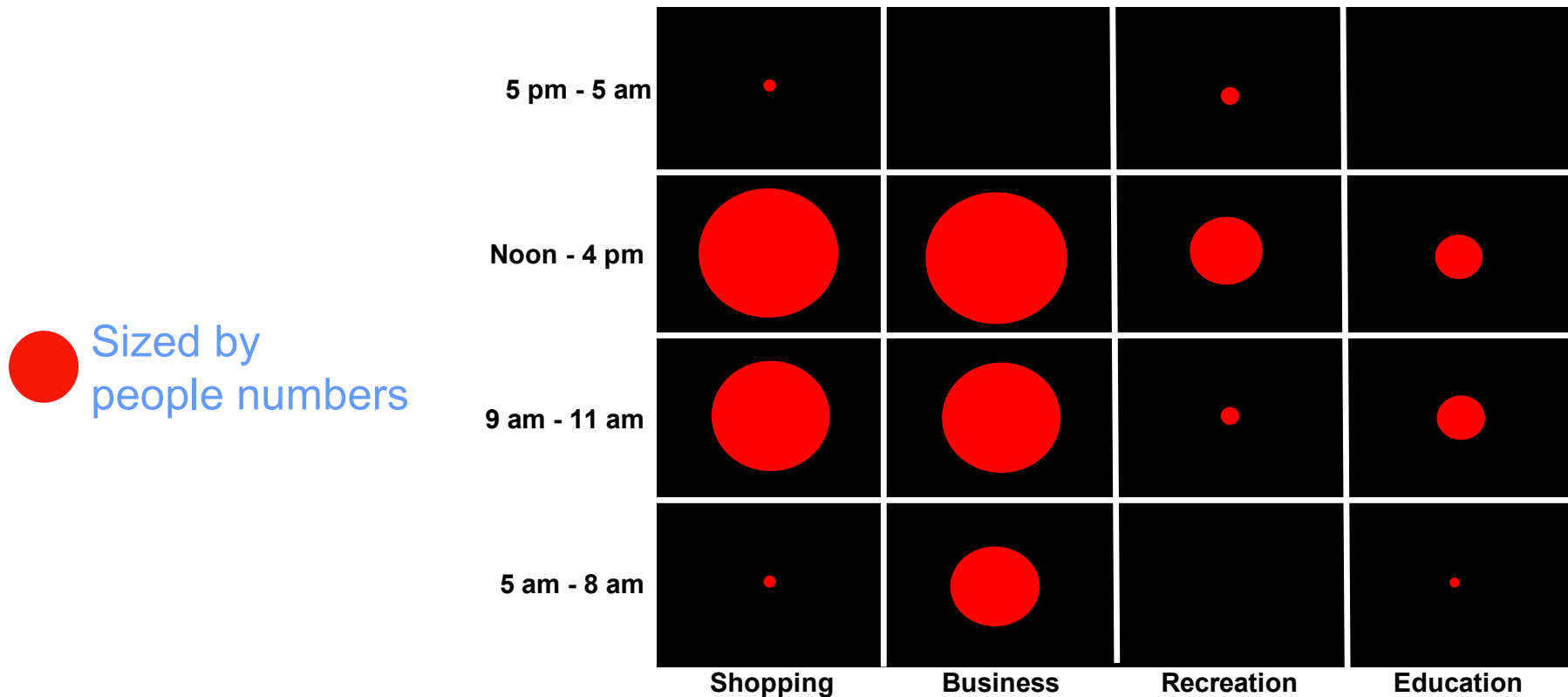
### Reasons for visit

Business (daytime)	59%
Education (daytime and evening)	41%

Low usage area of the CBD, with just 1.6% of people listing Eden Terrace as the primary area they visit. Those who do visit tend to be for business or work during the day. Also education during the evening, and during the day.



# Old Town usage times and activities



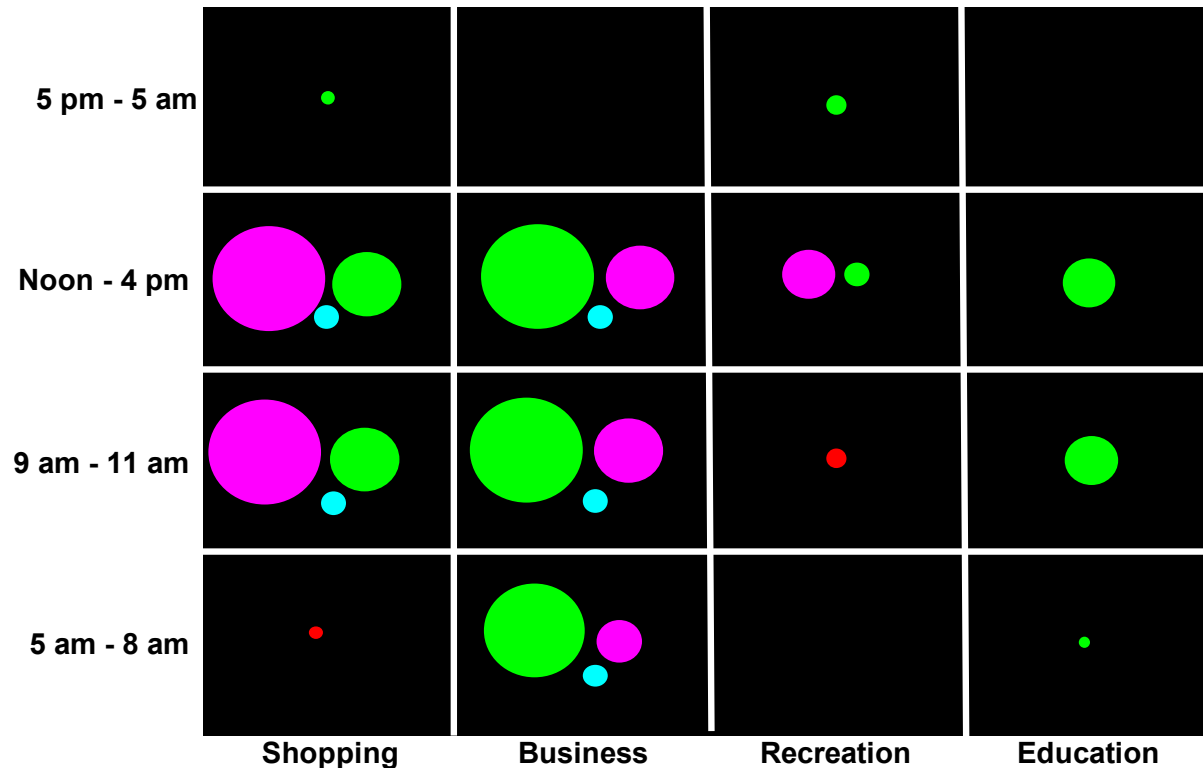
Of the 46,000 people visiting Old Town each day:

- The largest group are for daytime shopping, 18,000 people
- The next largest groups is business, 17,000 people
- The other most important uses are recreation 7,000 people, and education 4,000



# Old Town usage by whom

- Aucklanders
- 18 to 35 year olds
  - 36 to 55 year olds
  - 56 year old +
- Overseas Tourists
- Non-Aucklanders



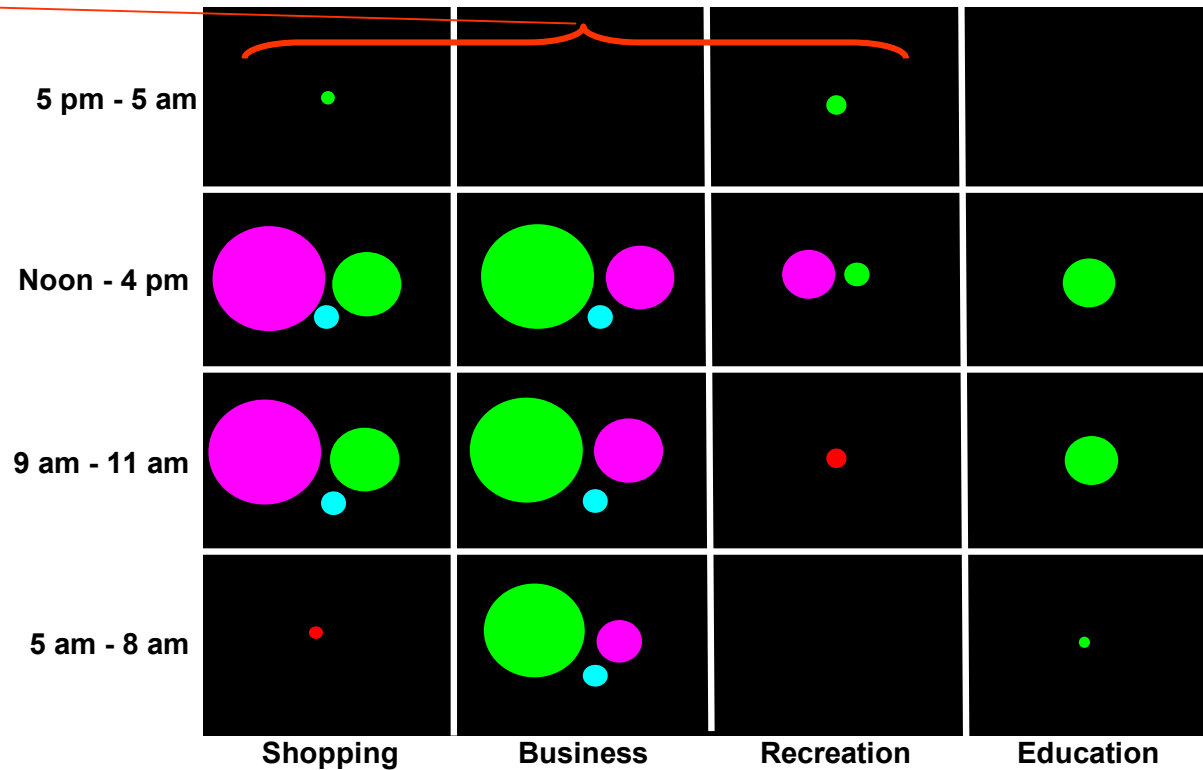
In shopping and recreational use of Old Town during the day the largest group is the 36 to 55 year olds. This is reversed for business/work use of Old Town with larger numbers of the younger demographic dominates. All respondents for Education use of Old Town were 18 to 35s.



# Old Town usage by detailed activity

## Key activities

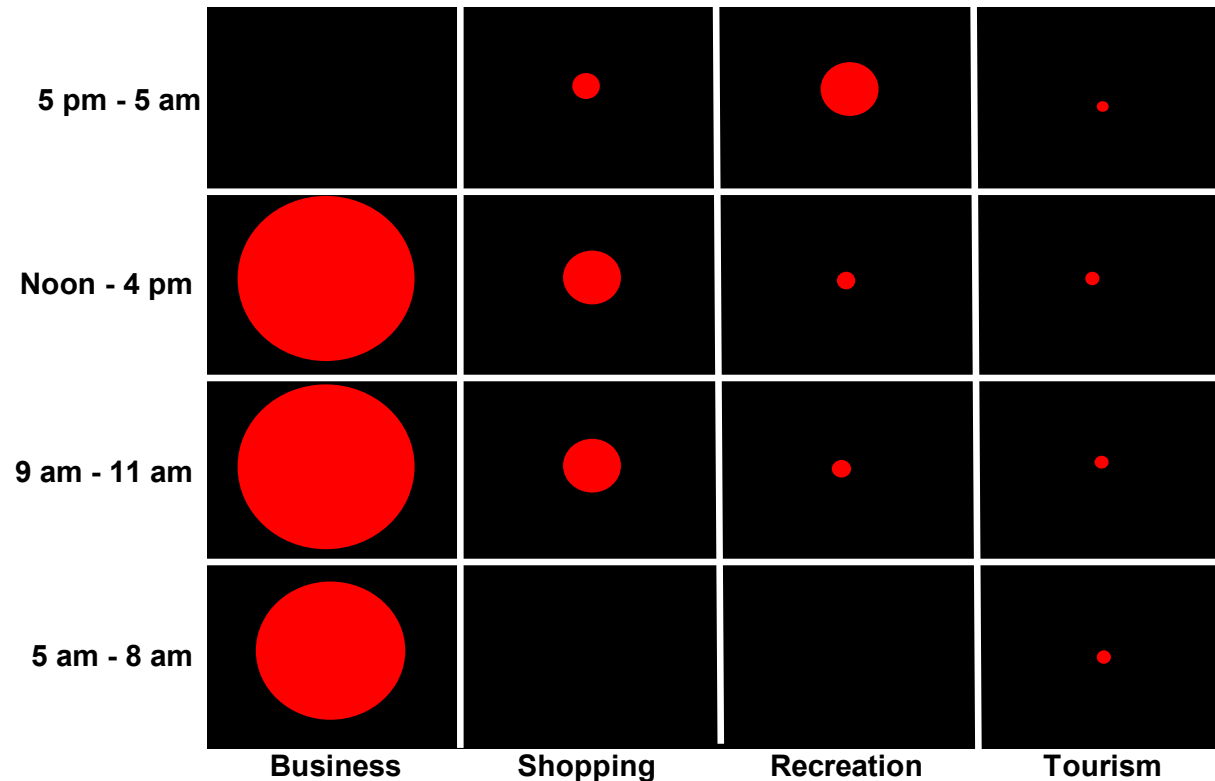
- Shopping
- Business
- Work
- Dining, cafes, lunch
- Movies
- Night life
- Have a drink in bars
- Enjoy sights and sounds





# Westside usage times and activities

 Sized by people numbers



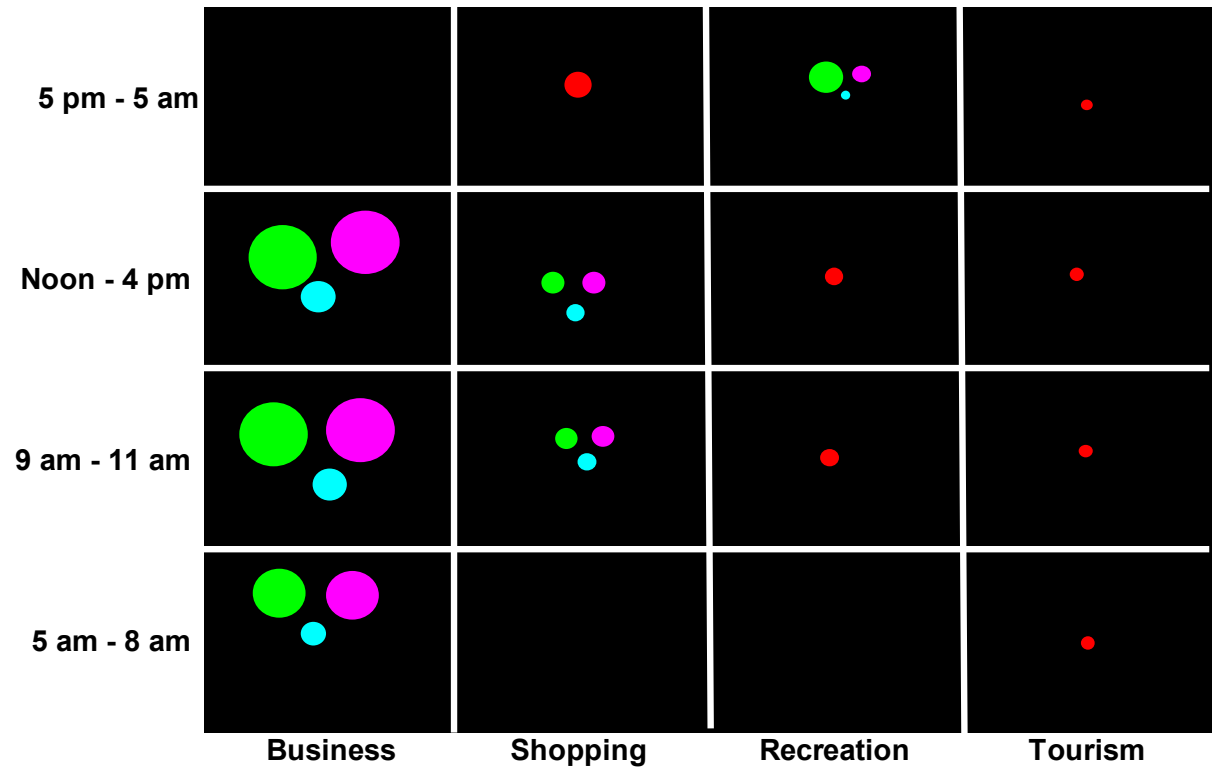
Of the 39,000 people visiting Westside each day:

- The largest group are for business, 18,000 people
- The next largest group is shopping, 11,000 people, followed by recreation 7,000 and tourism 2,000 each day



# Westside usage by whom

- Aucklanders
  - 18 to 35 year olds
  - 36 to 55 year olds
  - 56 year old +
- Overseas Tourists
- Non-Aucklanders



75% of business users split evenly between younger and middle age. 25% older people. Shoppers have a mixed demographic, with recreation at night tending to be the younger group

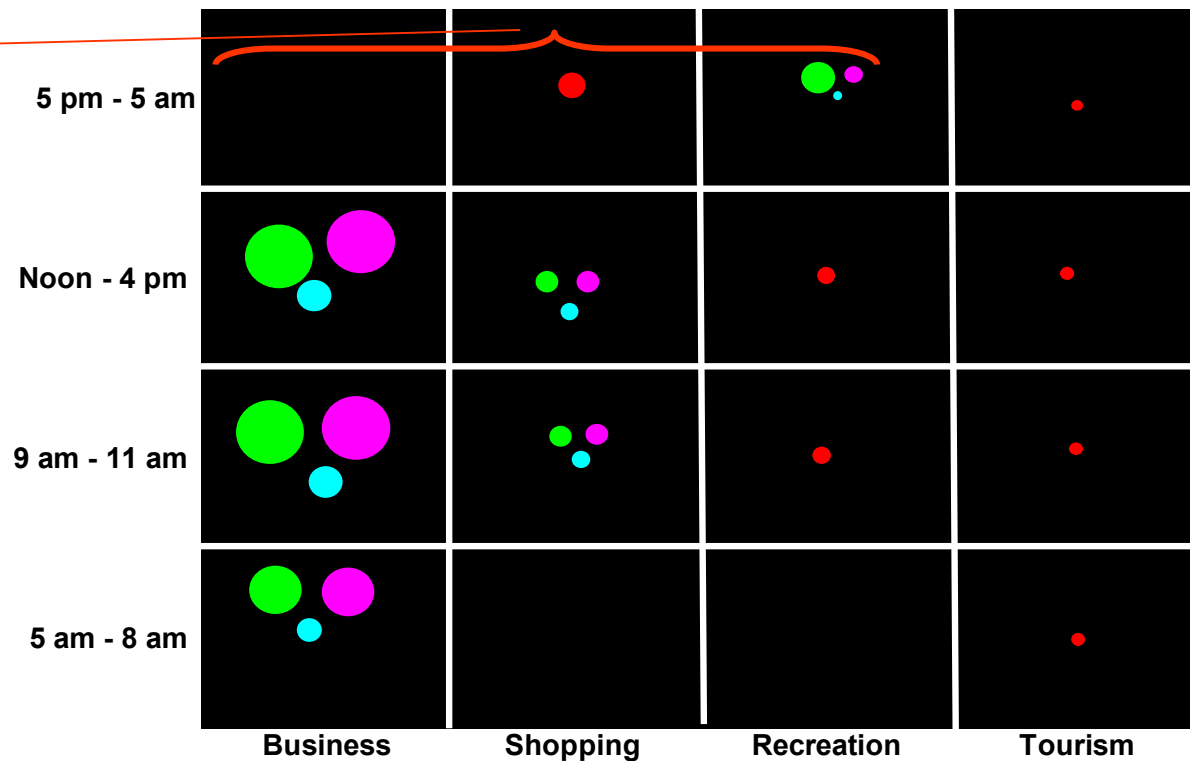




# Westside usage by detailed activity

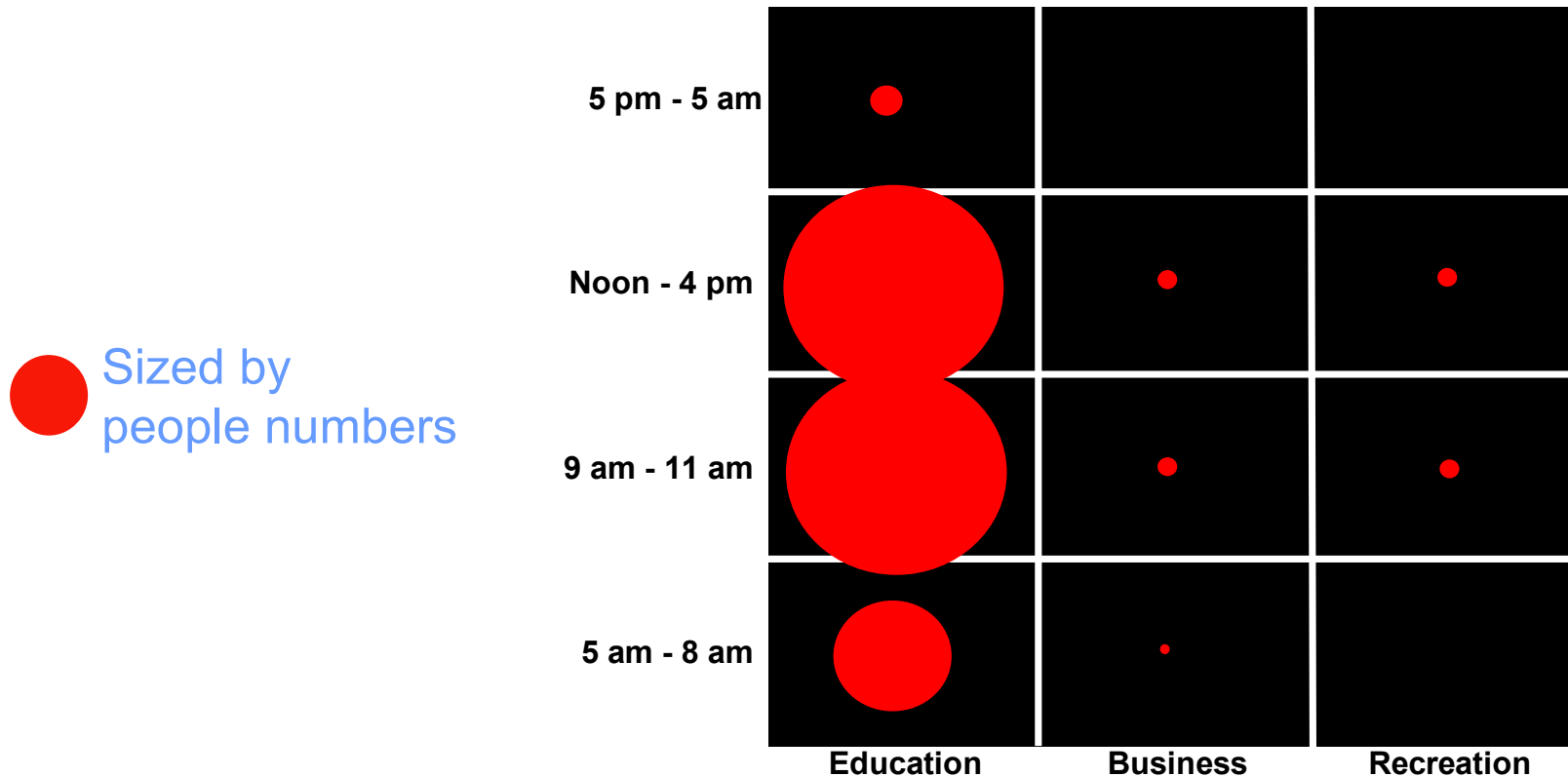
## Key activity

- Work
- Business
- Shopping
- Casino
- Dining/lunch
- Sightseeing
- Nightlife
- Clubs
- Have a drink in bars





# University usage times and activities



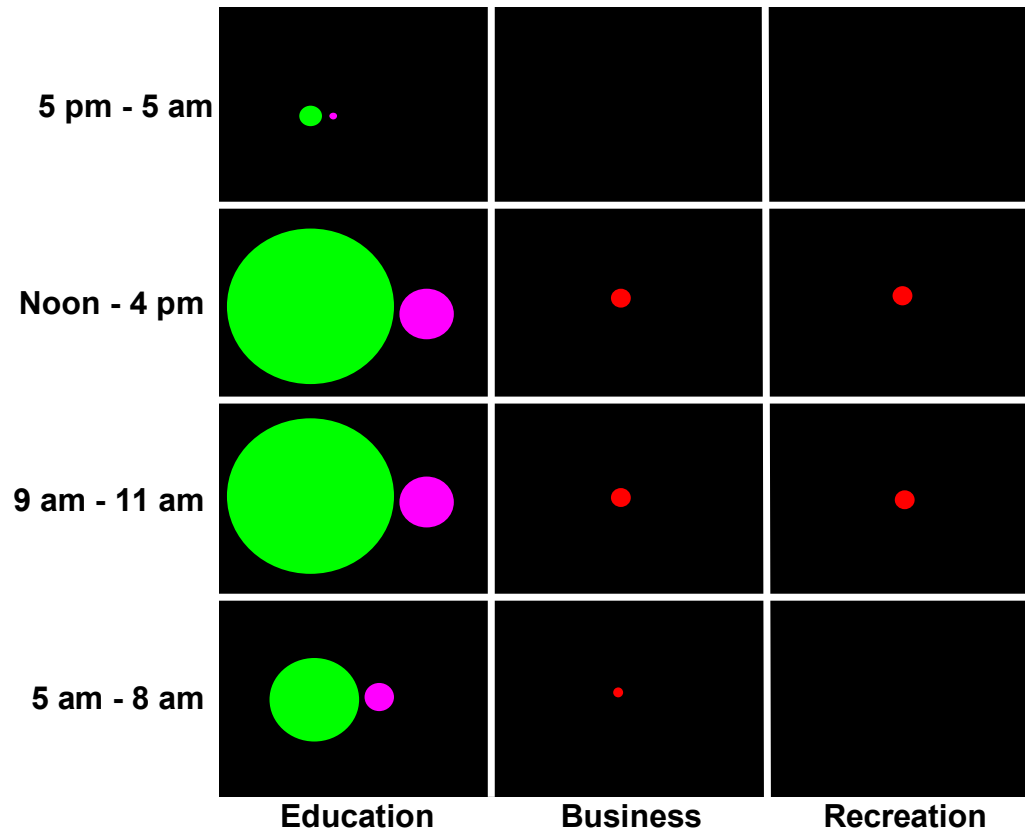
Of the 22,000 people visiting the University area each day:

- The largest group is those visiting for educational purposes, 16,000
- Most of which is during the day (15,000 people), but also used in the evening
- Other groups using the area are business and recreational users



# University usage by whom

- Aucklanders
- 18 to 35 year olds
  - 36 to 55 year olds
  - 56 year old +
- Overseas Tourists
- Non-Aucklanders

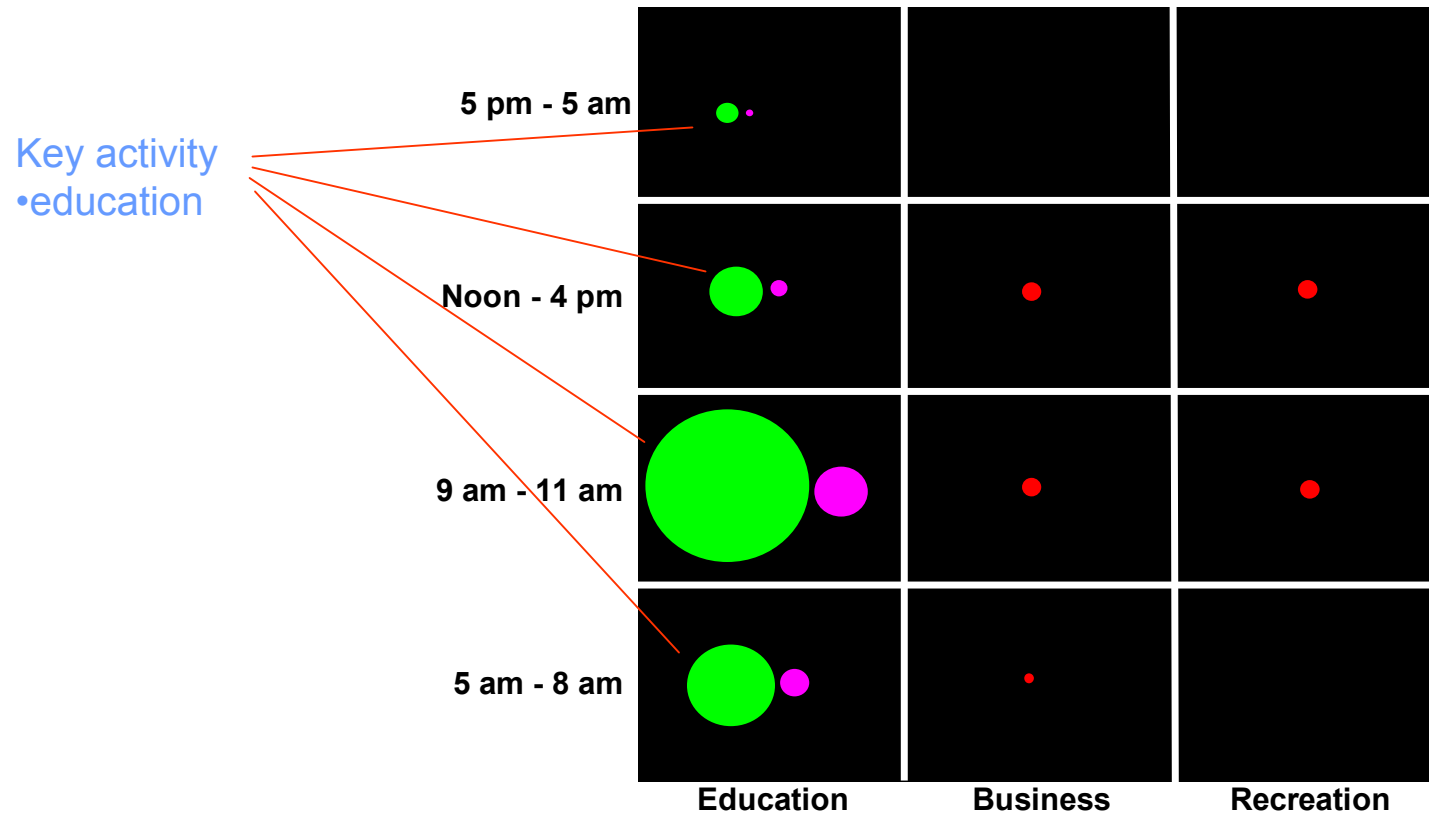


75% of education use is 18 to 35 year olds. There is however still 25% of education use in the 36 to 55 year old age bracket. With business use of the University 40% is 18 to 35s, 40% 36 to 55 year olds, and 20% 56 and over.





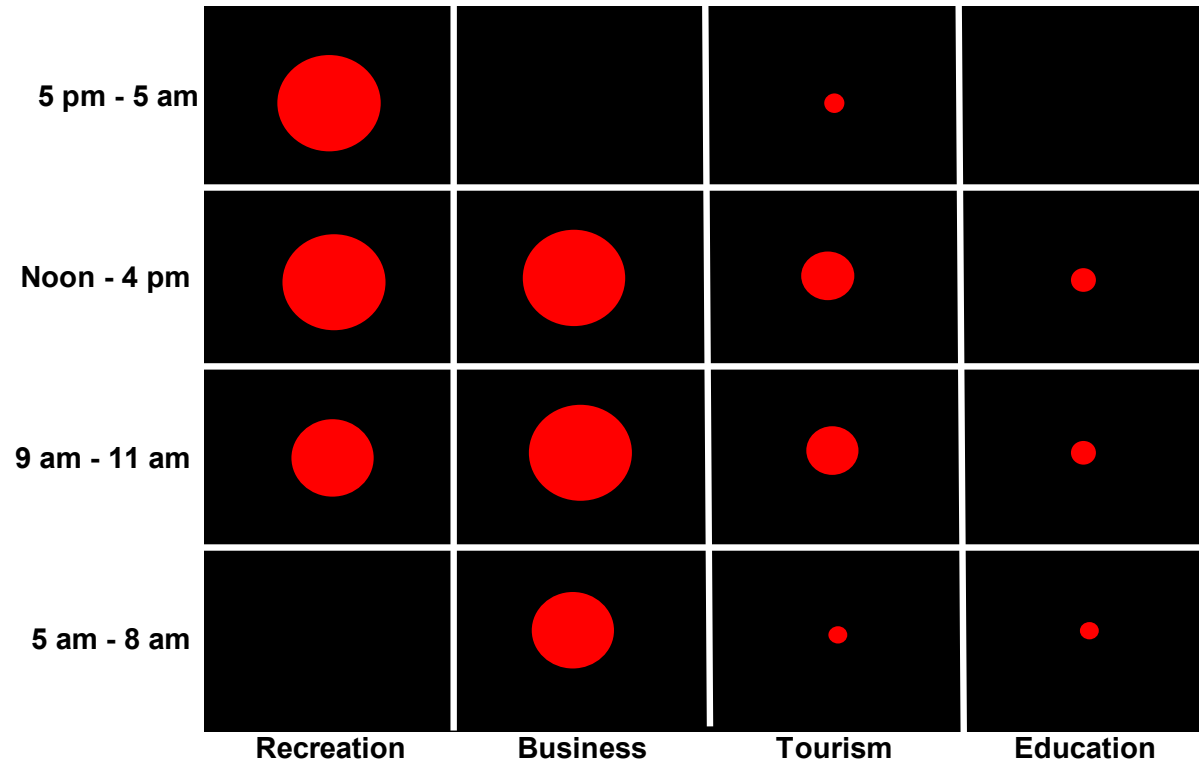
# University usage by detailed activity





# Aotea usage times and activities

 Sized by people numbers



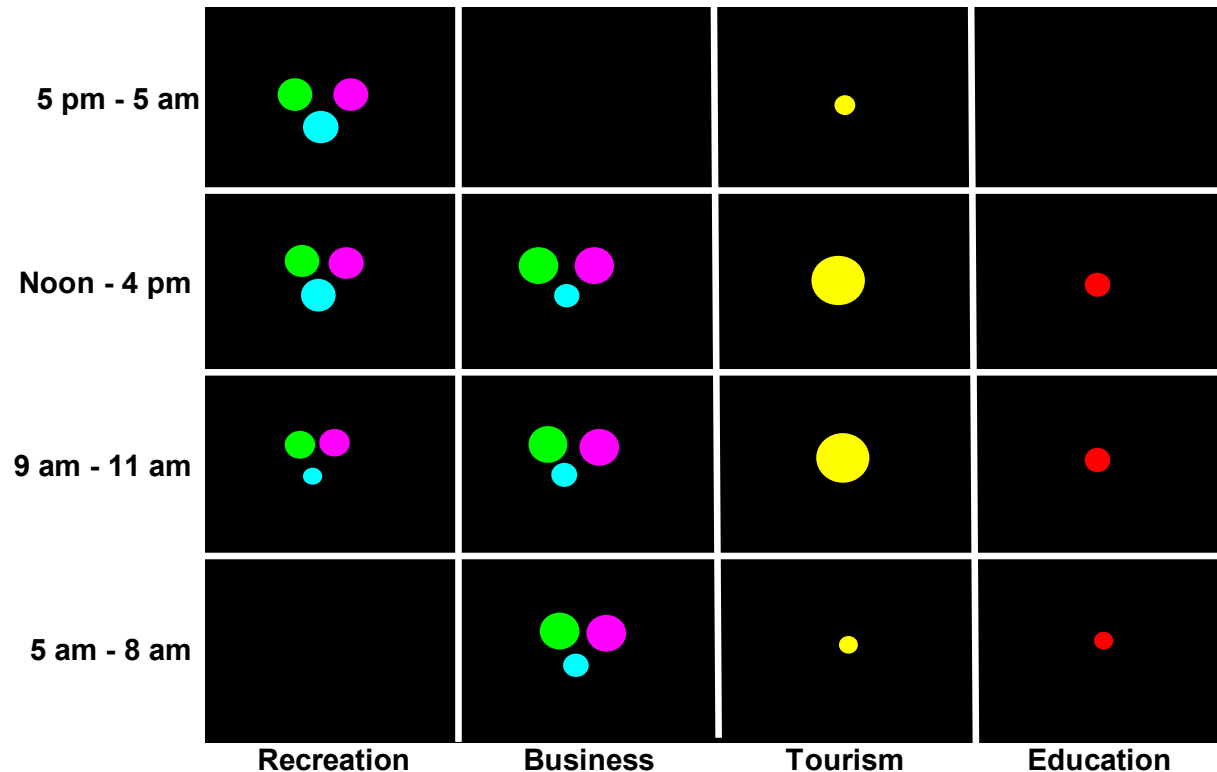
Of the 22,000 people who visit the Aotea area on any given day:

- The largest group are recreational users averaging 3,500 on any one day. Business use is at a very similar level except is geared towards daytime use, versus evening and night time
- Aotea is popular for tourists with nearly 4,000 visiting on any one day. The other major use is education with 1,500 people



# Aotea usage by whom

- Aucklanders
  - 18 to 35 year olds
  - 36 to 55 year olds
  - 56 year old +
- Overseas Tourists
- Non-Aucklanders



Unlike other areas of the CBD the over 55's strongly represented in recreation in this area in the evening. They're similar numbers to younger and middle age recreational users of Aotea. Aotea is also one of the major draw-cards inside the CBD for overseas tourists.

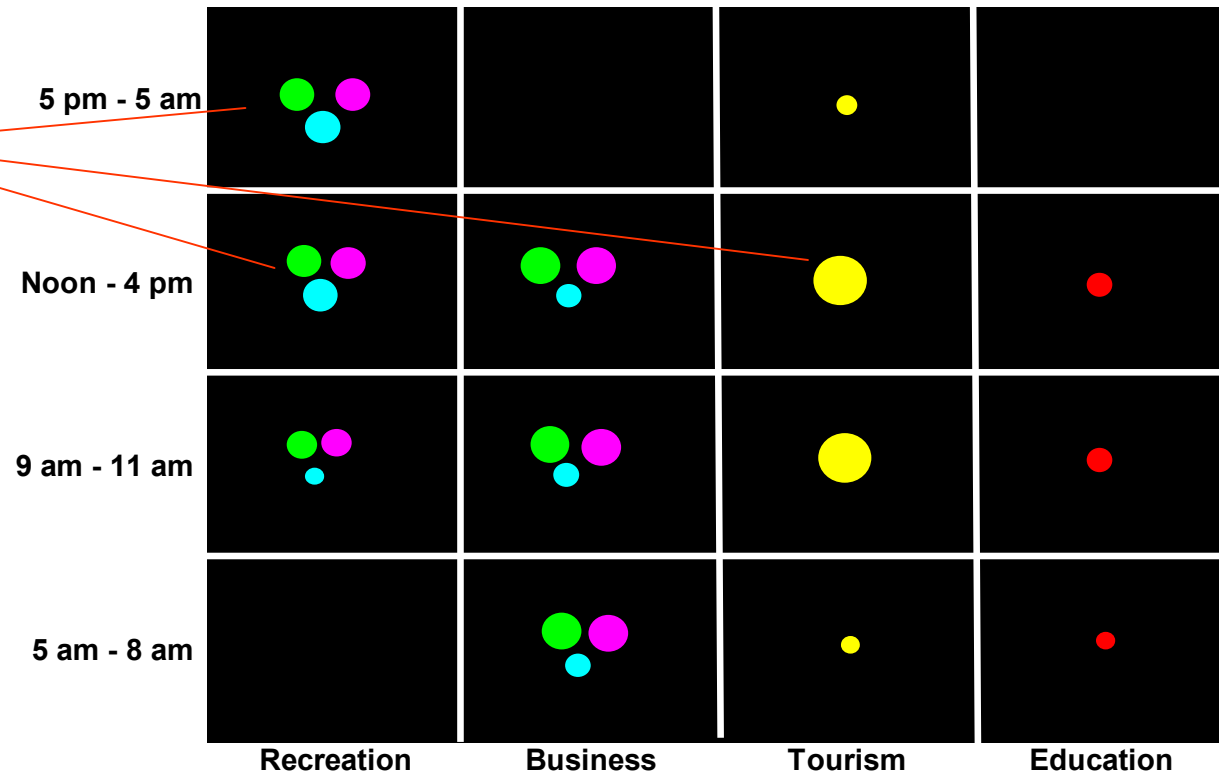




# Aotea usage by detailed activity

## Key activities

- Enjoy sights and sounds
- Stage shows at Aotea
- Symphony Orchestra
- Sightseeing
- Shopping
- Movies





# Nelson Street usage and activities

## NELSON

### Visiting per day

Aucklanders	6374
Non-Aucklanders	28
Tourists	168

TOTAL 6570

Survey respondents primary visit area 13

### Reasons for visit

Business	53%
Accommodation	16%
Shopping	16%
Recreation	10%
Tourist	5%

Note: sample numbers too low for an accurate area map for this area

Another low usage area of the CBD, with just 2.5% of people listing Nelson Street area as the primary area they visit. More diverse usage here than other low use areas. Primary use is business, followed by accommodation, shopping recreation. Some Tourists also have this down as primary CBD area they're visiting.



# Vincent Street usage and activities

## VINCENT

### Visiting per day

Aucklanders	3825
Non-Aucklanders	0
Tourists	0

TOTAL 3825

Survey respondents primary visit area 4

### Reasons for visit

Business (daytime) 100%

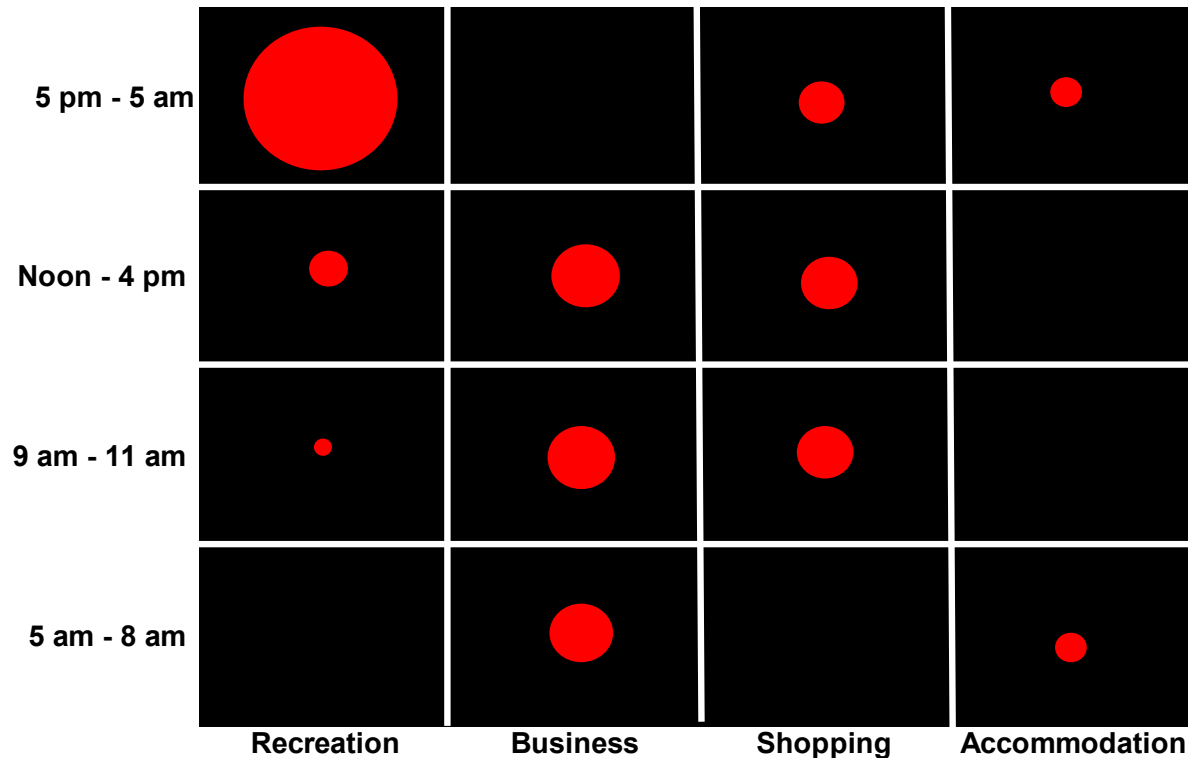
Note: sample numbers too low for an accurate area map for this area

Low usage area of the CBD, with just 1.5% of people listing Vincent Street as the primary area they visit. 100% business use of the area during the day, from the 4 respondents for this area.



# Upper Queen usage times and activities

 Sized by people numbers



Of the 26,000 people who visit the Upper Queen area on any given day:

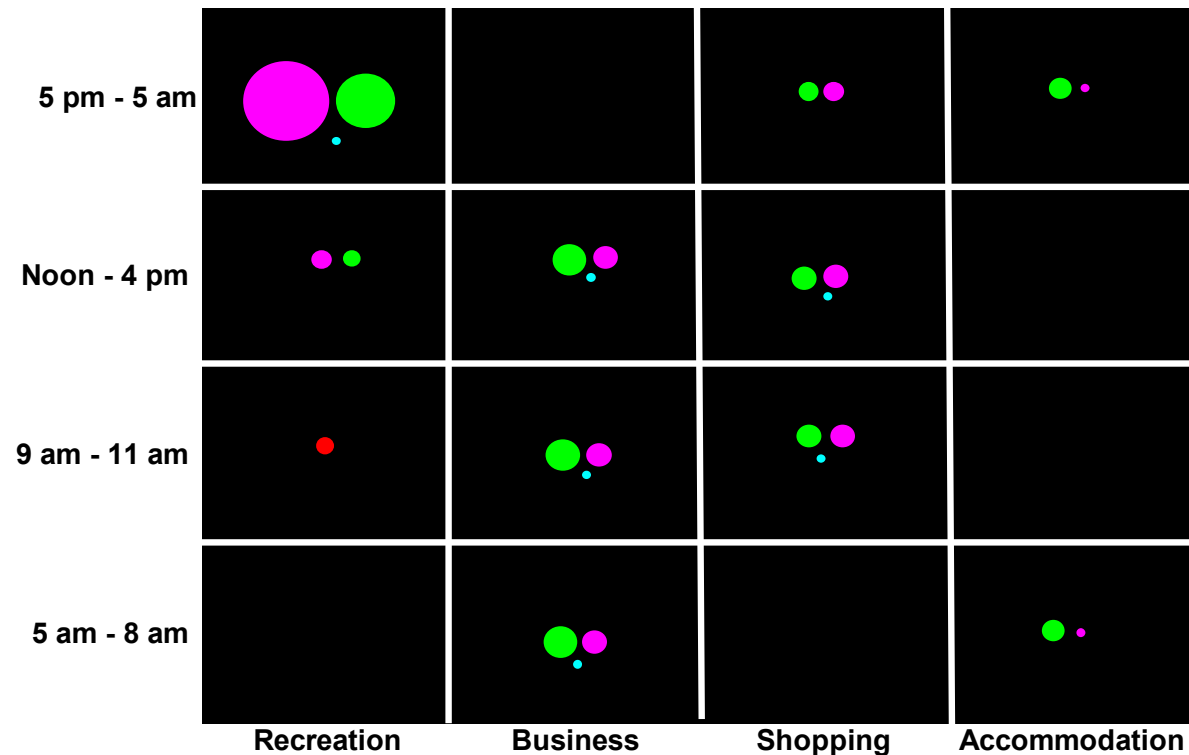
- The largest group are recreational users in the evening or night 7000, and 3,000 during the day
- The next group are business 3,000 throughout the day, followed by shoppers 2,000 from late morning through to evening, then by accommodation users 1,000



# Upper Queen usage by whom

## Aucklanders

-  18 to 35 year olds
-  36 to 55 year olds
-  56 year old +
-  Overseas Tourists
-  Non-Aucklanders



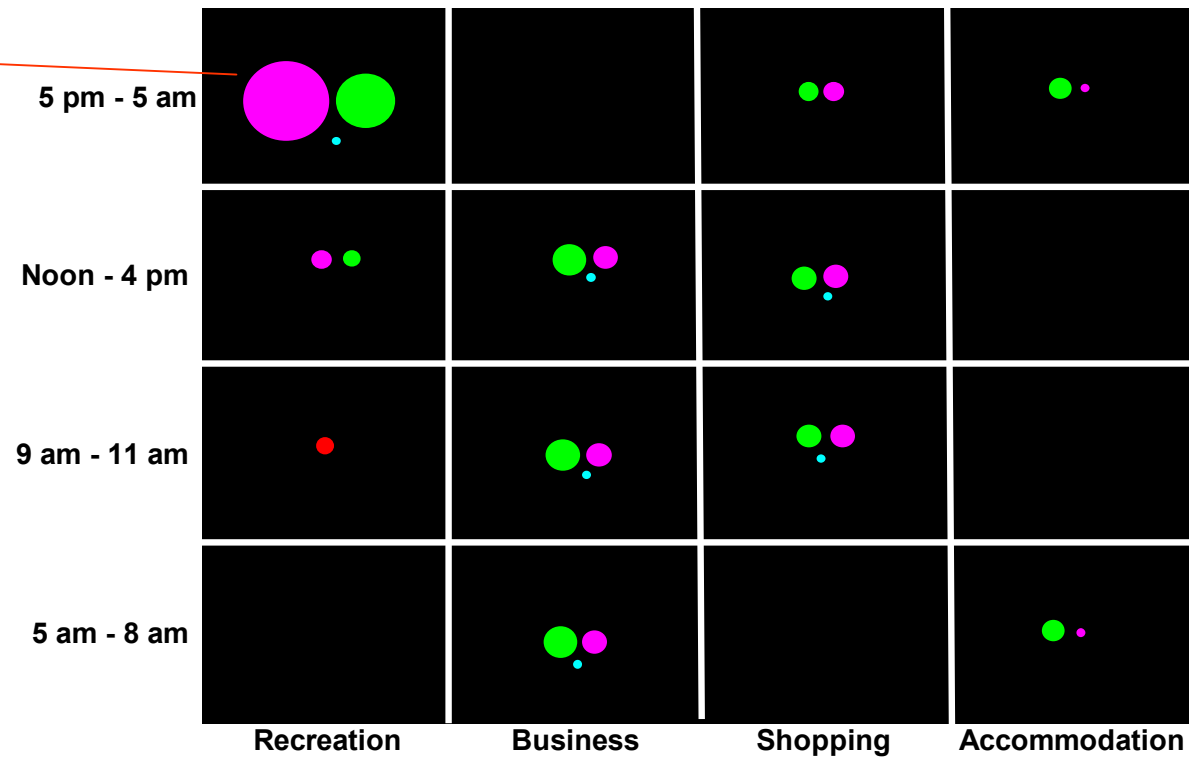
Middle age are the largest recreational users of upper Queen, closely followed by the 18 to 35s. Business and shoppers are evenly split between middle age and young, with a few older people as well. Accommodation in the Upper Queen area is predominantly the younger age group.



# Upper Queen usage by detailed activity

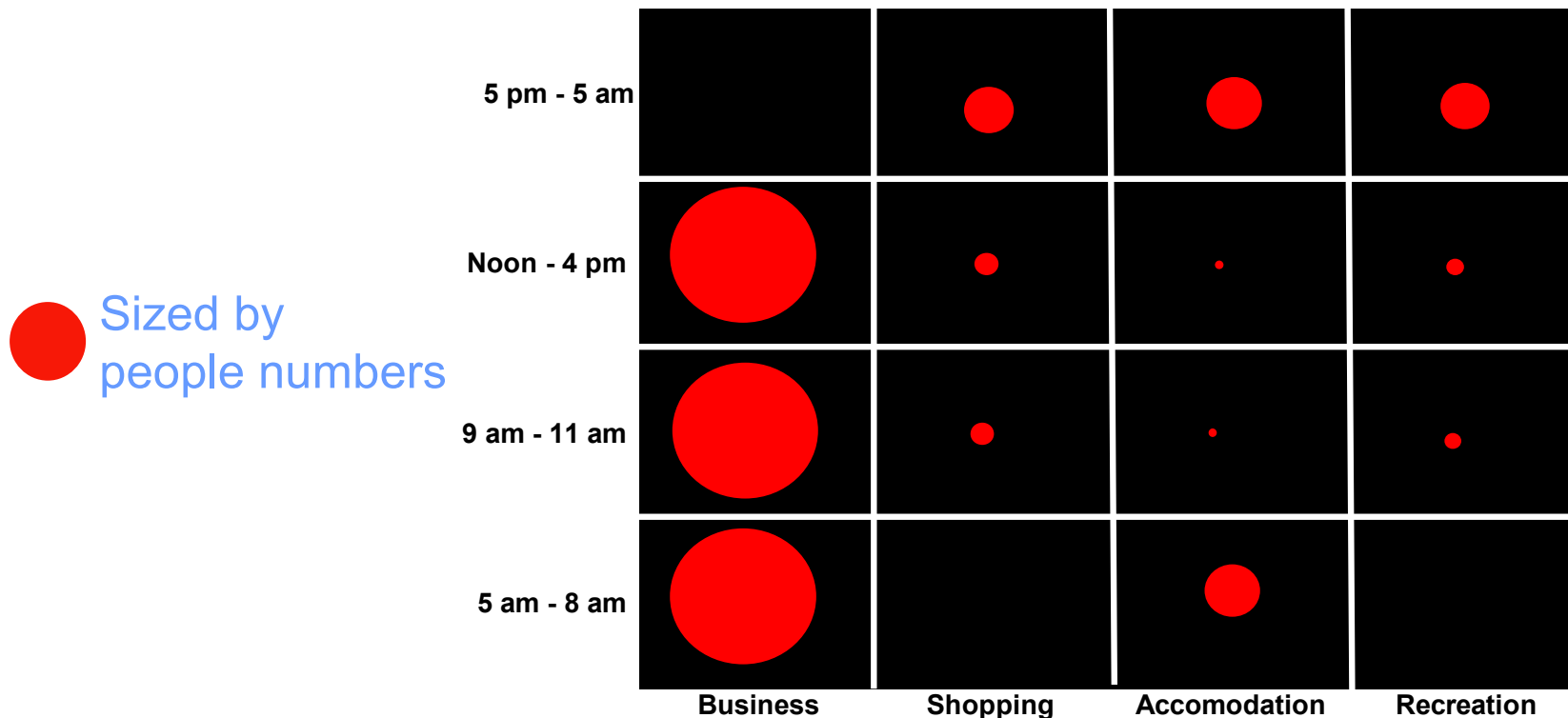
## Key activities

- Dinner
- Shopping
- Nightlife
- Have a drink in bars
- Clubs
- Playing pool





# K Road and Grafton usage times and activities



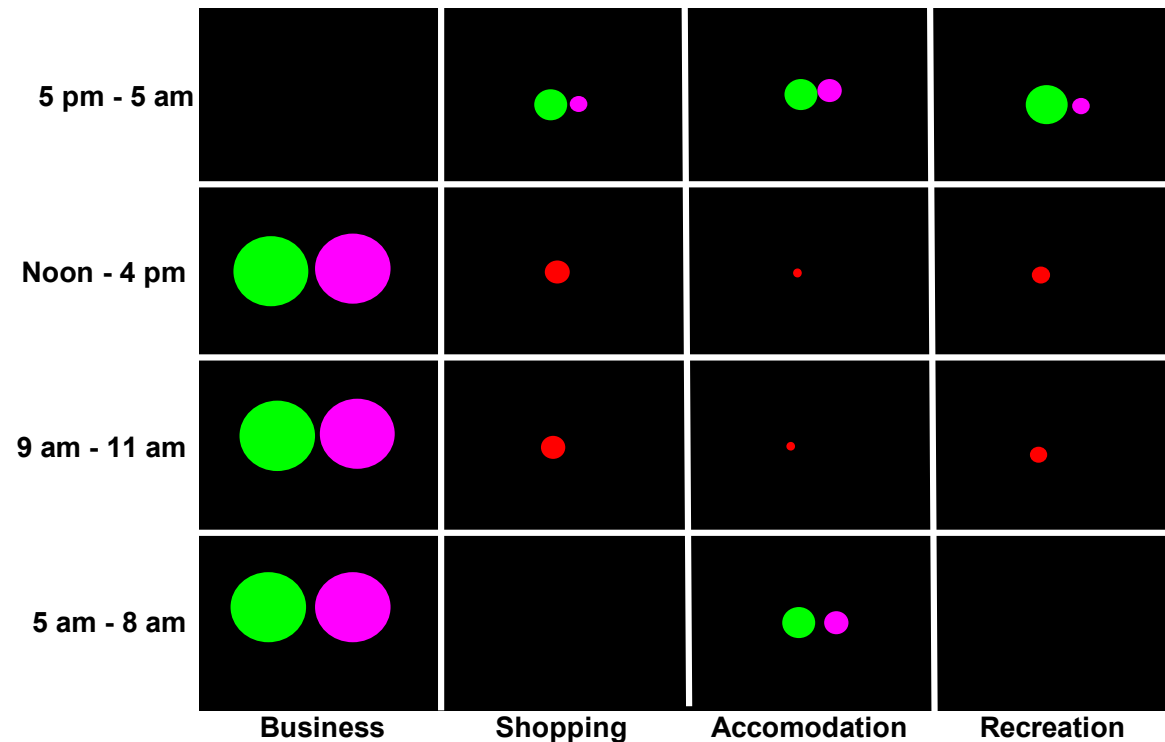
Of the 17,000 people visiting the K Road and Grafton areas daily:

- The largest group are for business, 6000 per day. Followed by shoppers 2,500 per day, accommodation and recreational users both 2,000 per day
- The area is quite active at night with shoppers, accommodation, and recreation uses concentrated in the 5 pm to 5am time slot



# K Road and Grafton usage by whom

- Aucklanders
- 18 to 35 year olds
  - 36 to 55 year olds
  - 56 year old +
- Overseas Tourists
- Non-Aucklanders



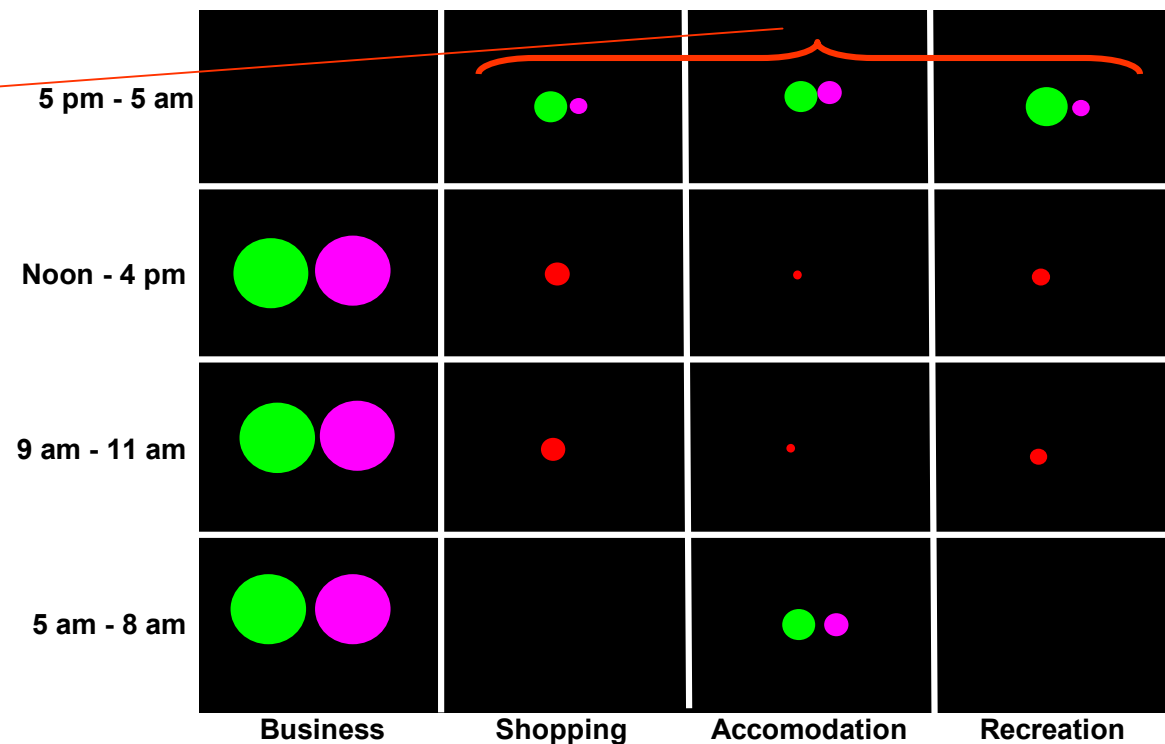
Equal numbers of younger and middle age in the working population in the area. Twice as many shoppers are younger people than middle age. Likewise most of the recreational users of the area are the 18 to 35 age group. Little tourist activity in the area.



# K Road and Grafton usage by detailed activity

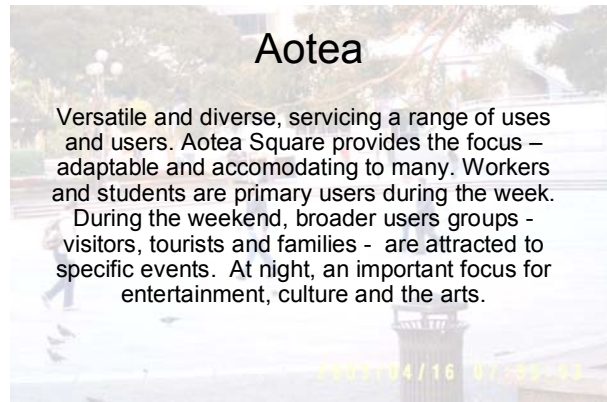
## Key activities

- Shopping
- Clubs
- Nightlife
- Dining, cafes
- Enjoy sights and sounds





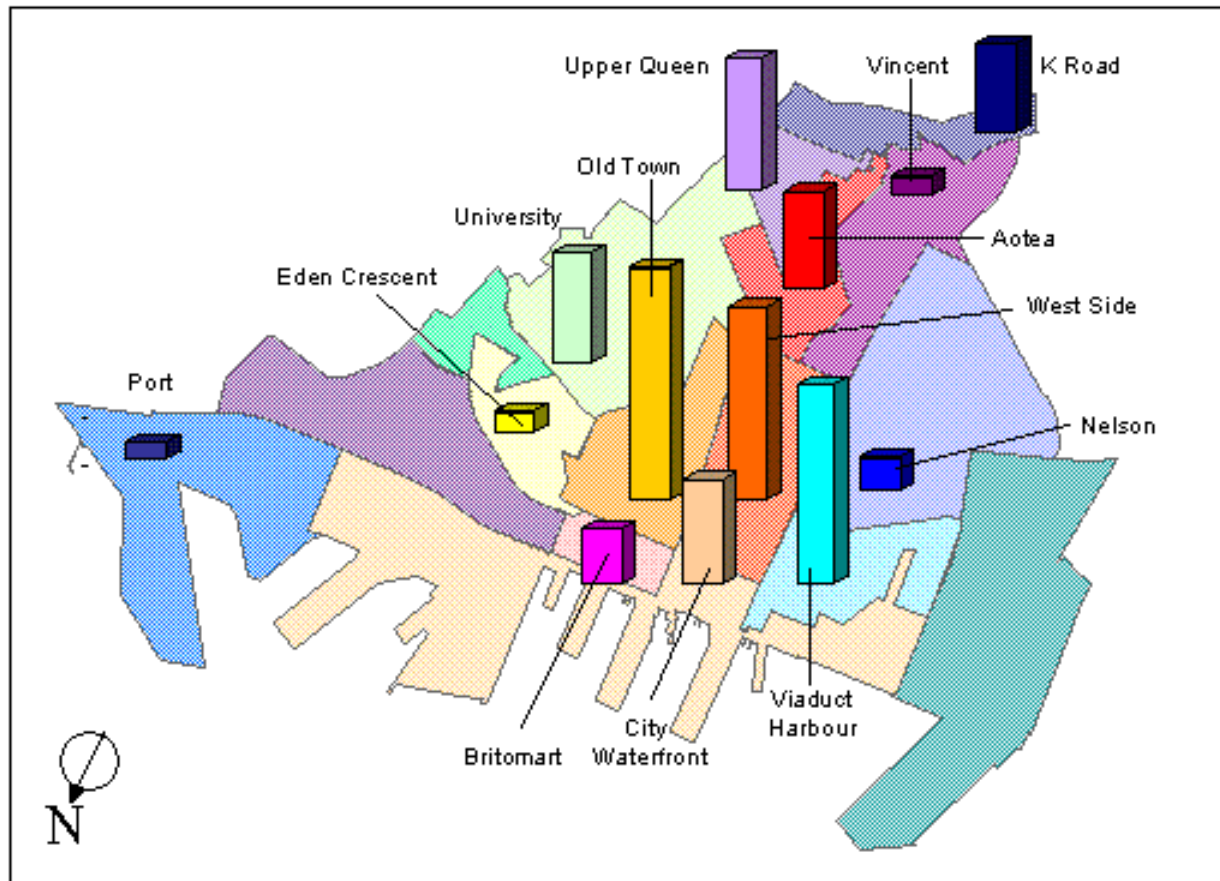
# Qualitative detail



For each of the CBD areas there is an excellent qualitative report provided separately by Gravitas Research and Strategy Ltd.

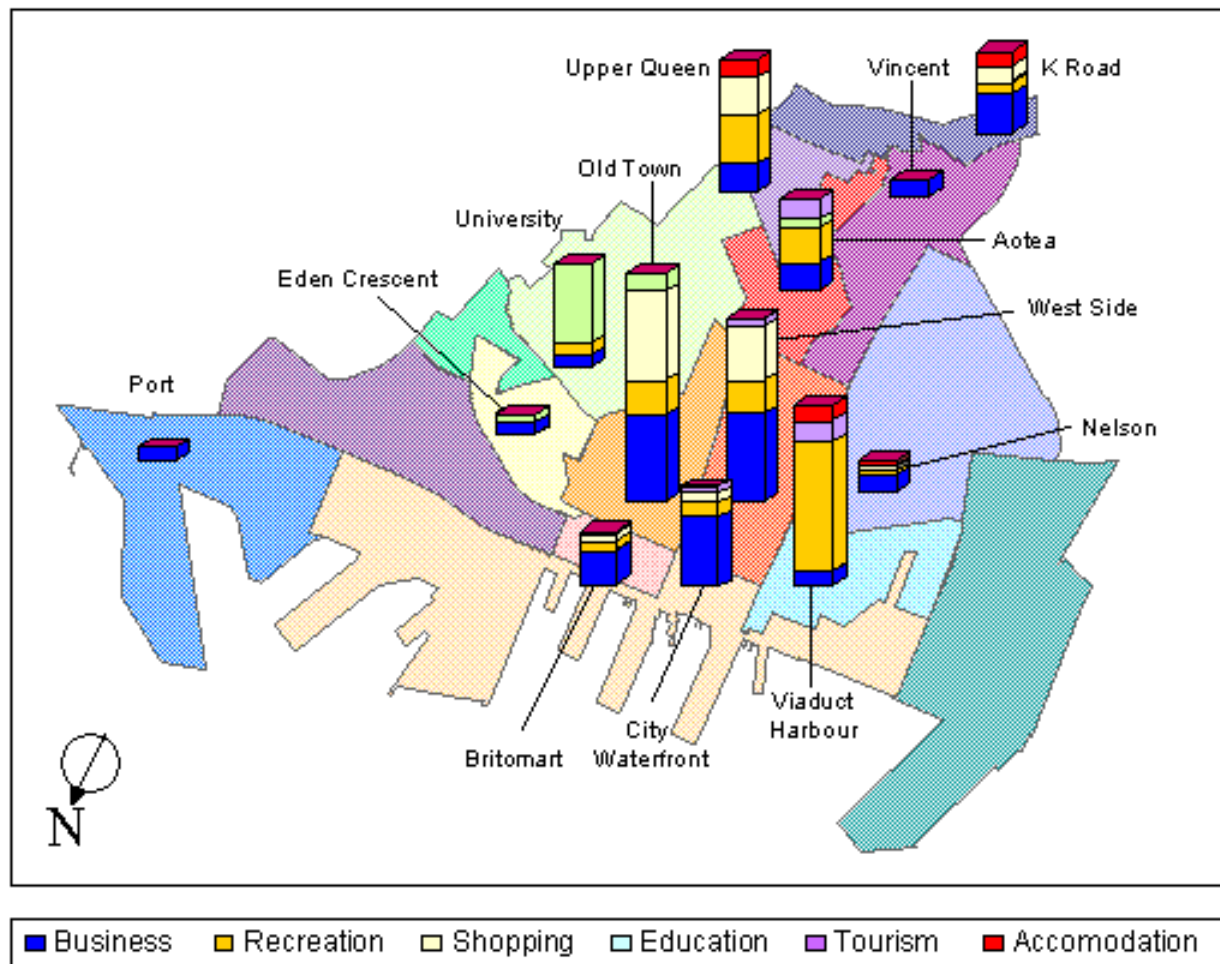
- Each report has a series of round the clock photos of the area during weekdays and weekends
- They have combined this with observational notes and summarized findings

# Total CBD use by Zone



Total Use by Quarter

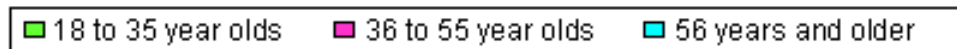
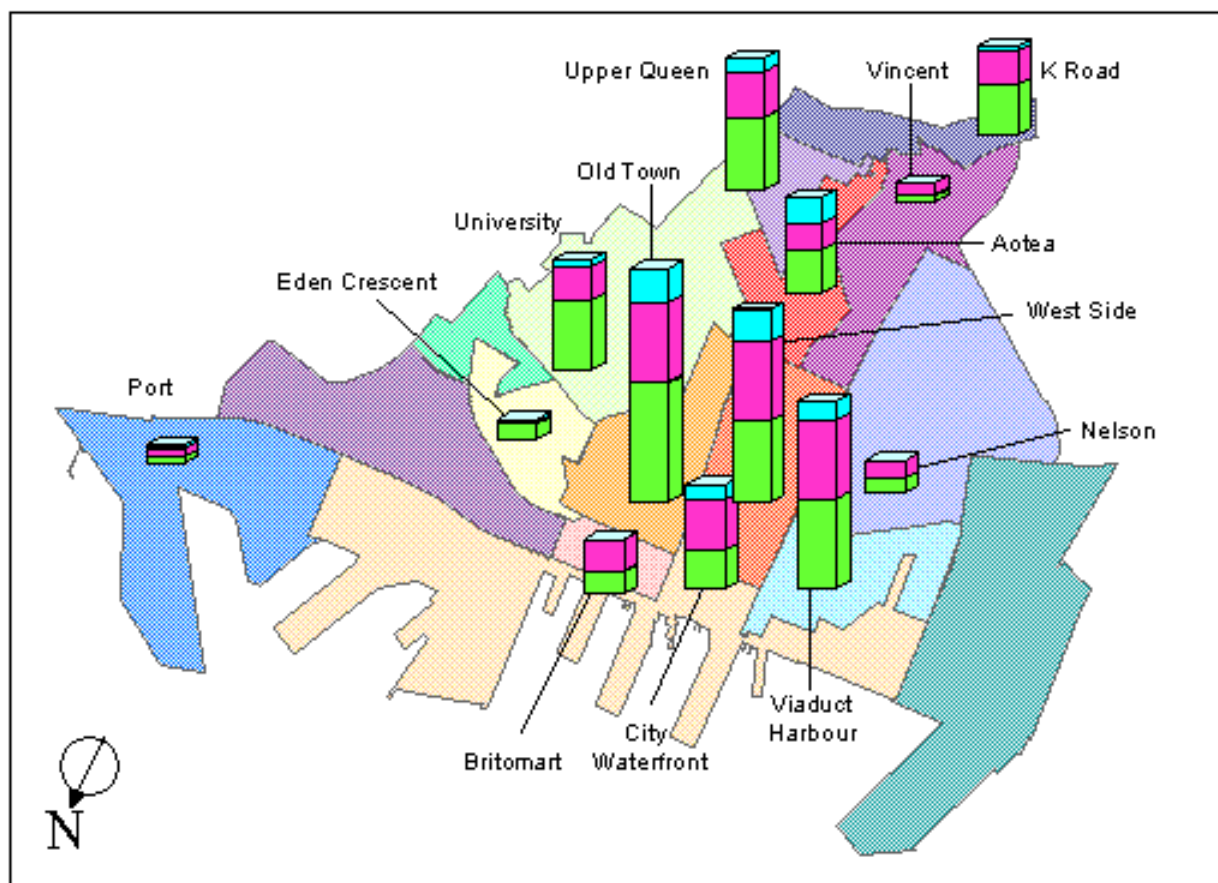
# Summary – Primary use



Map 1 – Primary Use

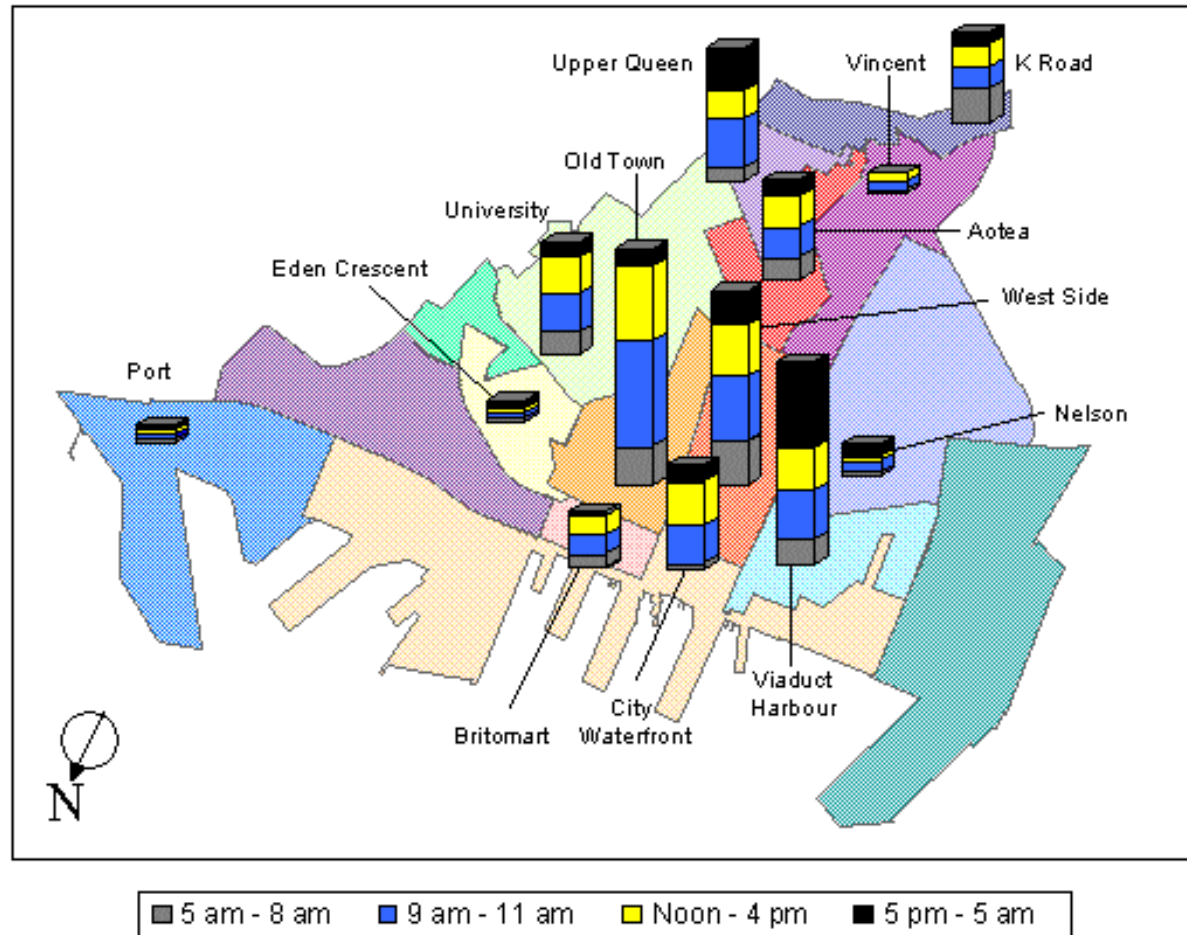


# Summary – Use by whom



Map 2 – Use by Whom

# Summary – Use at what times



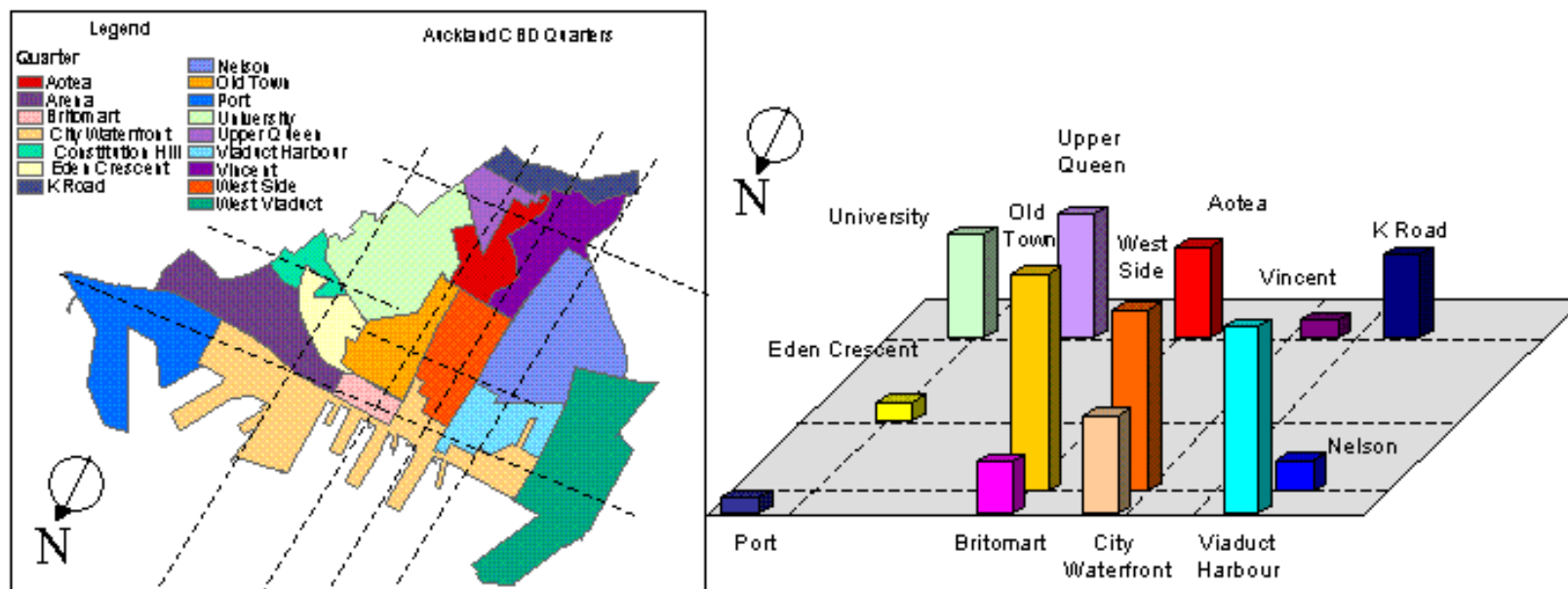
Map 3 – Use by Time of Day



# Aerial view of CBD use



**Projection of Total Visitor Traffic by CBD Quarter  
(Simulated Aerial view of CBD from above Harbour Bridge)**

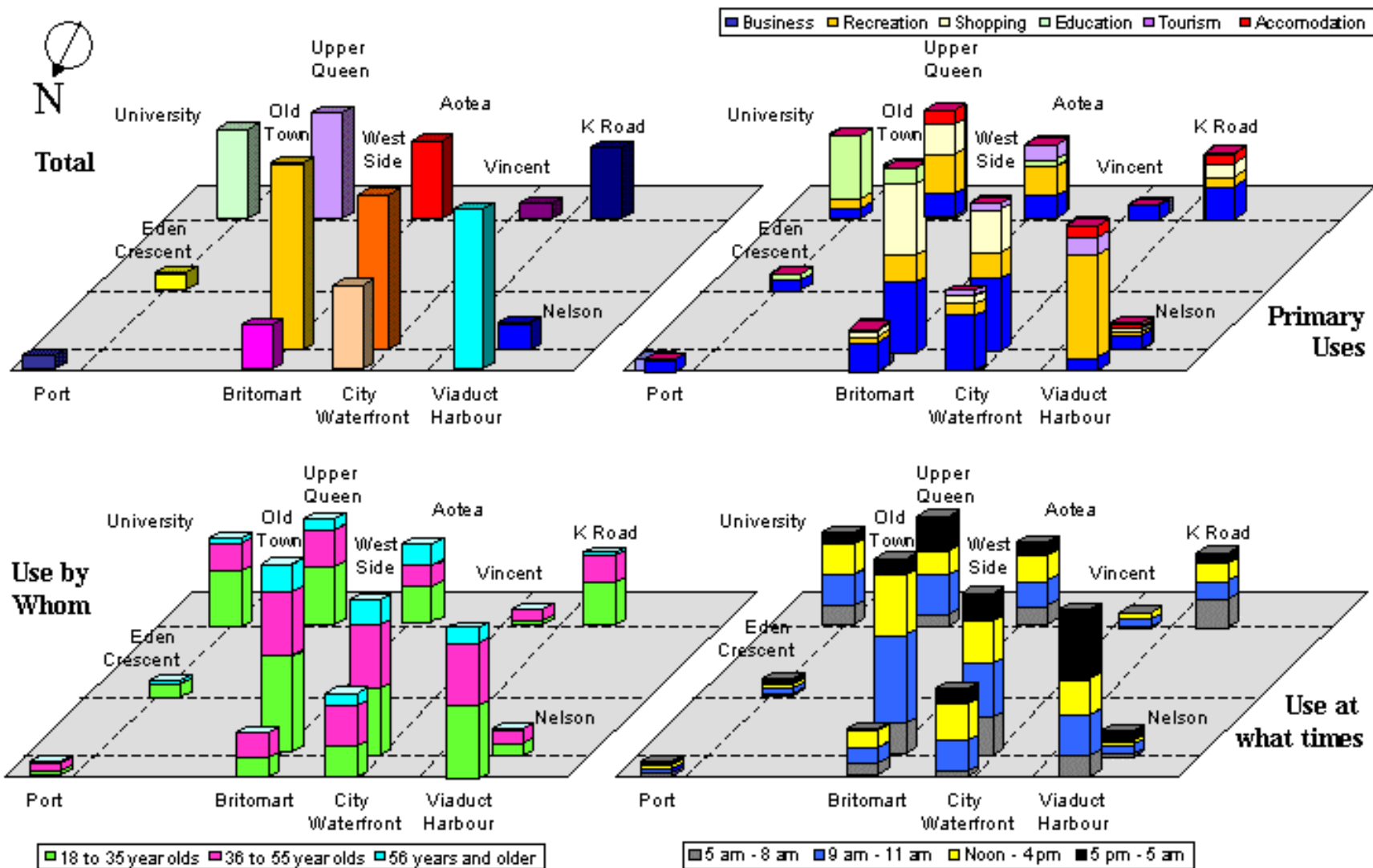


*The dotted lines indicate the approximate perspective lines along which the bars representing each Quarter are plotted*

**The height of each bar represents the total visitor traffic within each Quarter**



### Combined Projections & breakdowns by Quarter





# Summary

## Diverse pattern of CBD use:

- Some areas more specialized use like University for Education, and Viaduct for recreation. Other areas like Old Town, Westside, and Aotea have mixed use.
- Little generalization possible except that all areas contain business use, and most have recreational use as well. Tourism and education areas tend to be in more select pockets

## Variable activity concentrations:

- Areas nearer the water heavily used, Old Town, Westside, Viaduct, Waterfront
- Other areas comparatively little use, with many opportunities to further develop

## Who using different areas:

- There is no significant demographic difference in use of different areas beyond age and overseas tourists. Areas like K Road and the University have a younger group visiting, with others like Aotea an older group
- Most popular tourists spots are the Viaduct, Aotea, the Waterfront and Westside

## When different areas are used

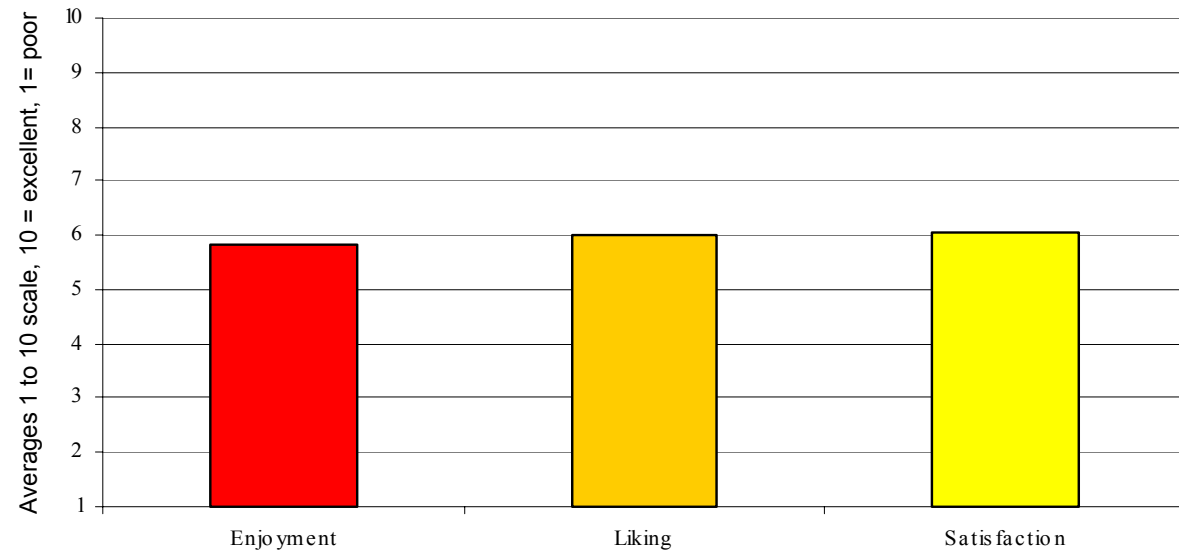
- Most areas active both during the day and night, although the activity and people using them are different. Much more business during the day, and little at night. The reverse is true for recreation.



# Enjoyment of CBD



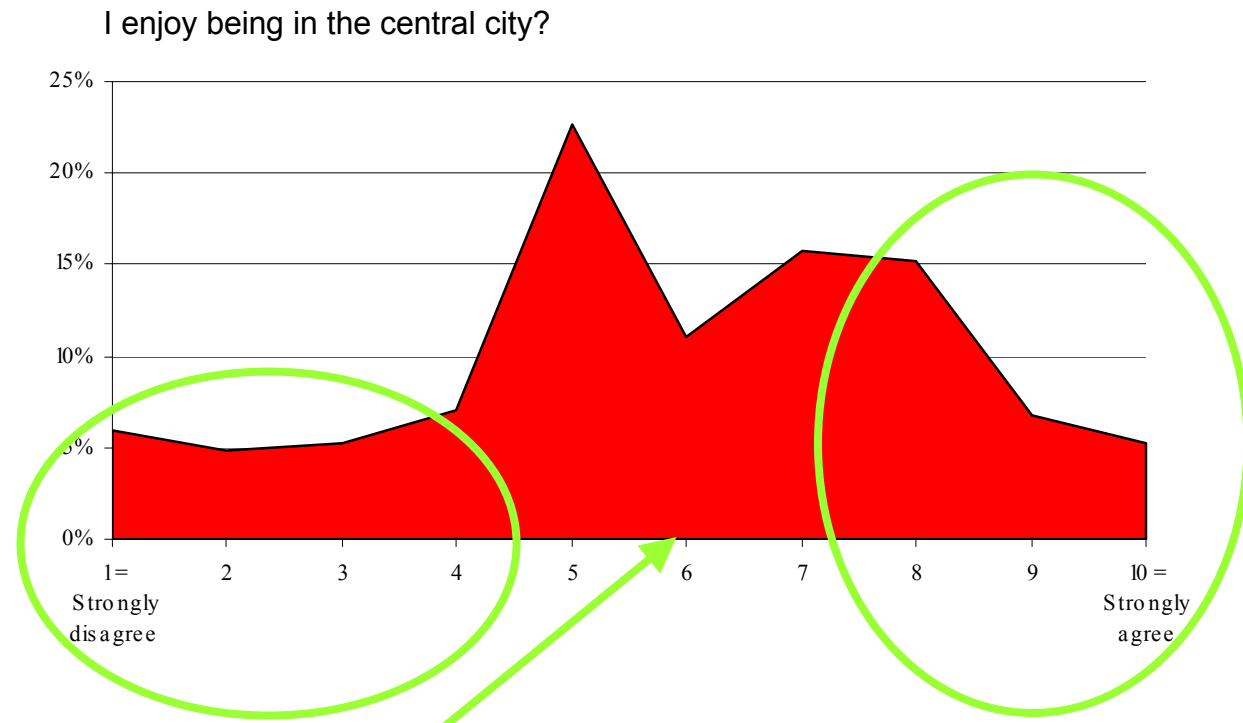
# Enjoyment of CBD use <sup>1</sup>



Moderate level of enjoyment. Average is 6 out of 10 across liking, enjoyment, and satisfaction measures – all of which rate almost identically



## Enjoyment of CBD use 2

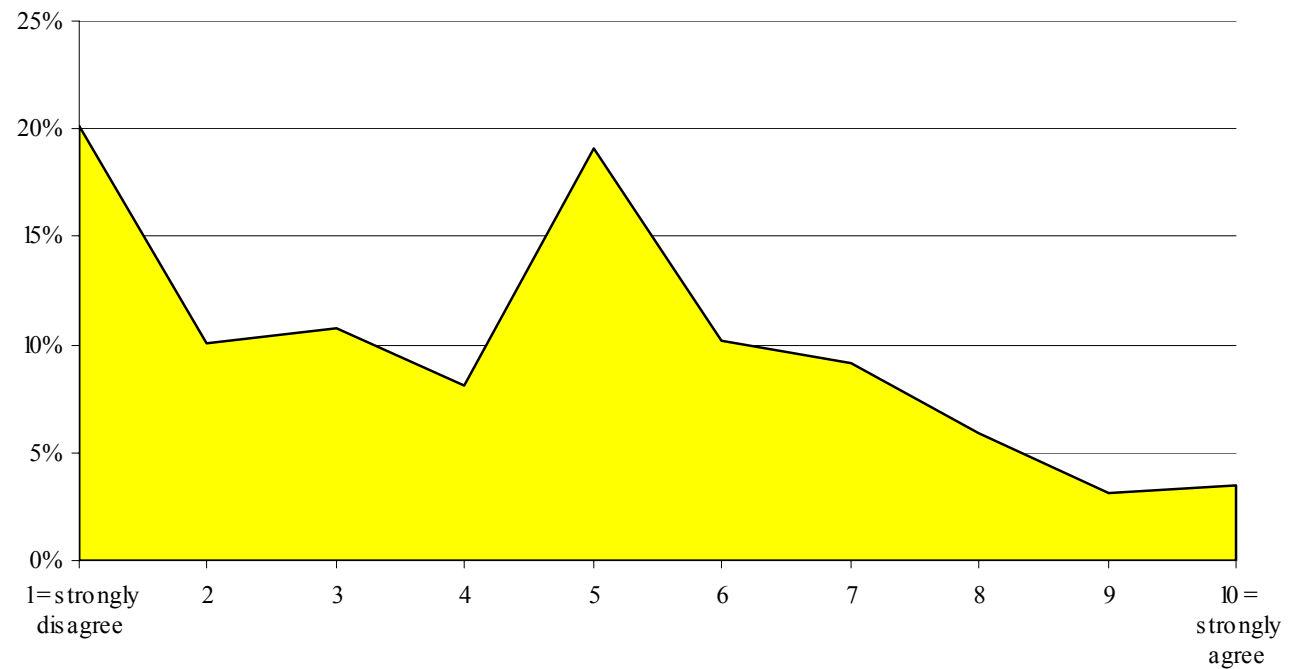


Although the average is nearly 6 out of 10 responses somewhat polarized. Over 15% of people rate 1 – 3 out of 10, toward strongly disagreeing that they enjoy the central city. While over 20% of people are 8 or over, toward the strongly agree end



# Identification with the CBD

The central city is me?



The majority of people, 68%, rate 5 or below on identifying with the CBD. 32% rate above 5, feeling the CBD is more them



# The Auckland CBD in a single word

- The survey included projective questions which asked respondents to describe their reactions to the city in different terms. One key question was:

If you could give me one word that describes how the central city makes you feel, what would it be?

- The Auckland CBD causes a broad range of reactions, but the overall picture is quite positive
  - 62% of the single words were positive, and 38% neutral or negative
- Details on the most commonly mentioned words follow



## Most common positive words

Happy (21)	Cosmopolitan (4)	Content (2)
Busy (19)	Energised (4)	Cool (2)
Good (18)	Enjoyable (4)	Diverse (2)
Excited (13)	Exciting (4)	Excellent (2)
Rushed (12)	Great (4)	Free (2)
Alive (11)	Proud (4)	Friendly (2)
Entertained (9)	At home (3)	Safe (2)
OK (7)	Nice (3)	Satisfied (2)
Interested (5)	Relaxed (3)	Special (2)
Vibrant (5)	Comfortable (2)	

( ) = frequency of mention; all other words mentioned only once

Positive words are 62% of the total. The CBD makes people feel happy and excited, but also has a relaxed, comfortable feel.



## Most common neutral and negative words

Stressed (11)	Sad (4)	Mediocre (2)
Tired (11)	Small (4)	Nervous (2)
Disappointed (9)	Apprehensive (3)	Painful (2)
Frustrated (9)	Average (3)	Puzzled (2)
Depressed (5)	Dirty (3)	Trapped (2)
Bored (4)	Indifferent (3)	Uncomfortable (2)
Harassed (4)	Anxious (2)	Crowded (2)
Hectic (2)		

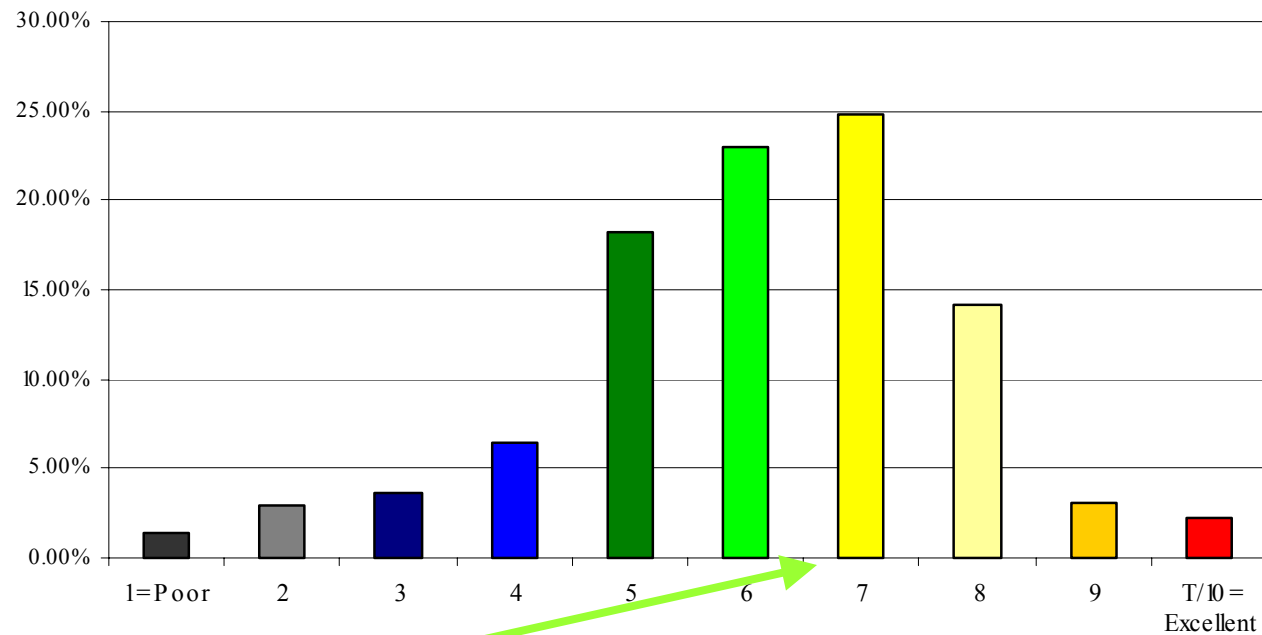
( ) = frequency of mention; all other words mentioned only once

Neutral to negative words are in the minority, 38% of the total. The CBD can make people feel stressed, tired, and uncomfortable



# Atmospheric factors

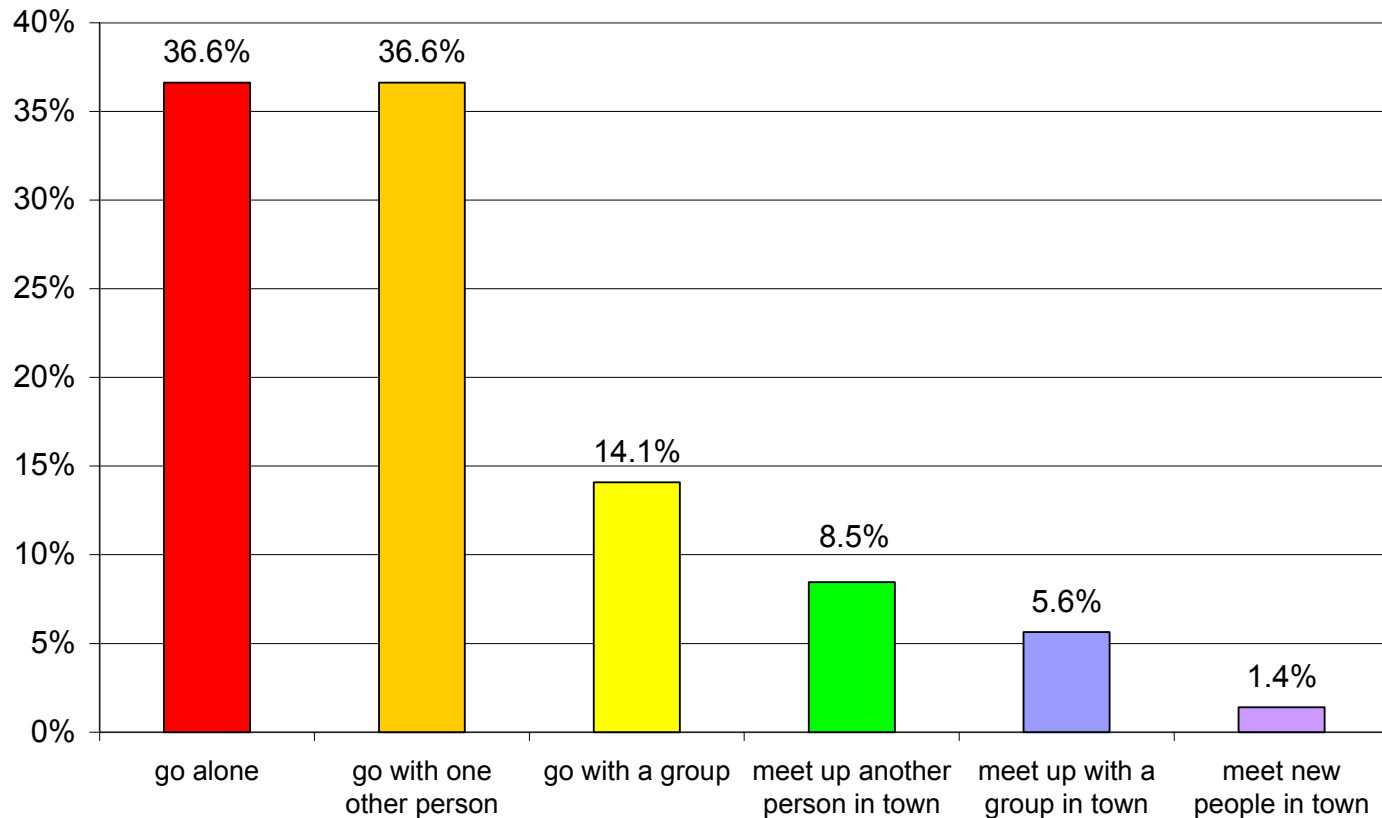
How would you rate the overall atmosphere of central city, on a 1 to 10 scale?  
Where 1 is poor and 10 is excellent.



The average rating of the CBD's atmosphere 6.1 out of 10.  
Most people rate the city between 5 and 8 out of 10.



## Individual factors: group size



45% of people use the CBD in pairs, 36% as singles, and 20% in groups. The typical group is 3 to 5 people.



# Atmospheric factors

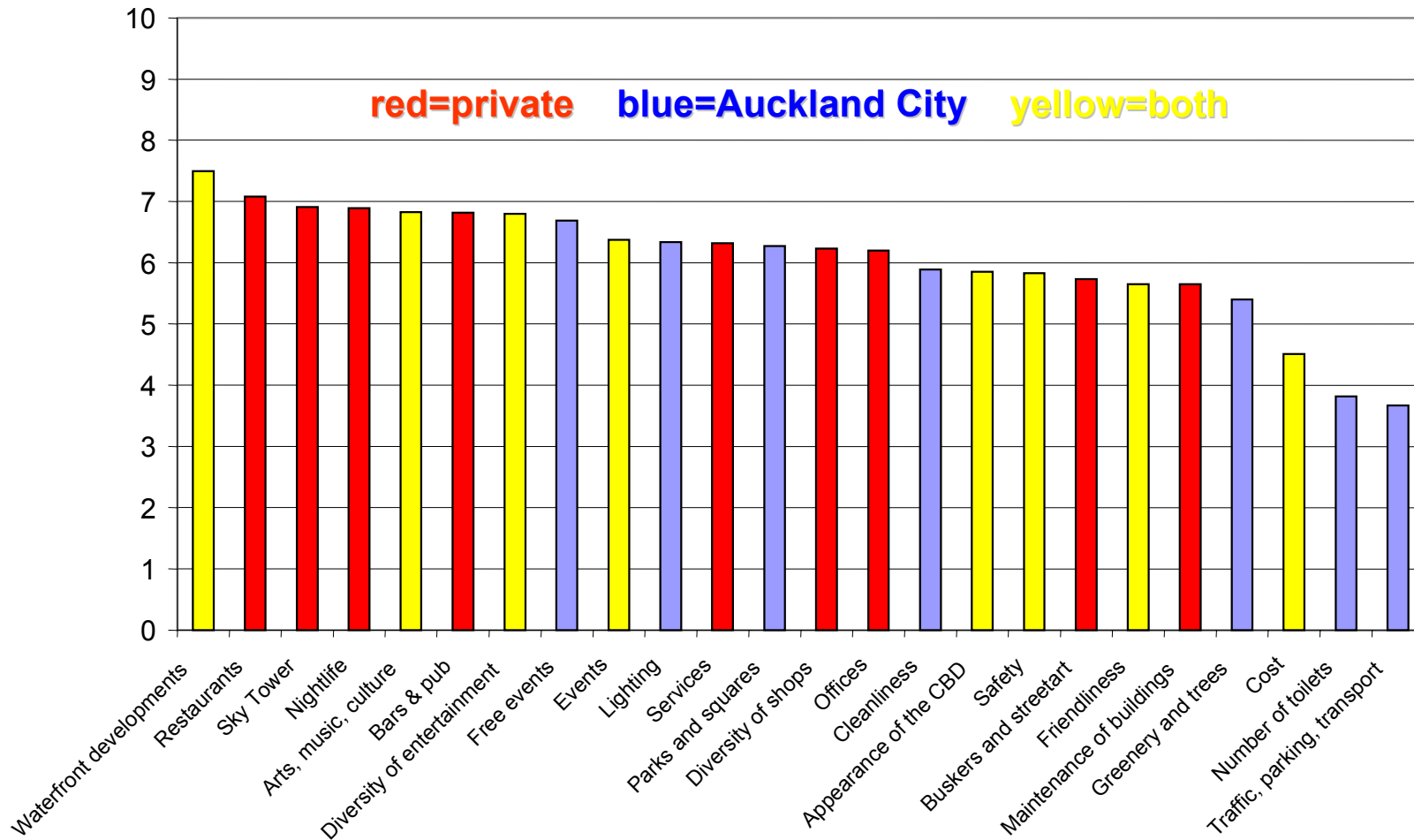
On a 1 to 10 scale, where 1 = strongly disagree and 10 = strongly agree, would you agree that the central city's atmosphere is \_\_\_\_\_?

	1 - 2	3 - 4	5 - 6	7 - 8	9 - 10	Average
Rushed	5.4%	10.8%	29.8%	33.6%	20.4%	6.56
Positive	4.7%	12.5%	40.1%	35.0%	7.5%	6.02
Happening	4.4%	12.6%	45.4%	31.3%	6.6%	5.95
Corporate	6.9%	14.7%	39.6%	27.7%	11.2%	5.86
Vibrant	4.5%	15.4%	50.7%	23.2%	6.3%	5.72
Buzzing	5.2%	20.3%	44.3%	24.1%	6.0%	5.59
Exciting	6.7%	20.8%	45.8%	20.5%	6.1%	5.46
Relaxing	16.1%	28.9%	34.6%	16.7%	3.6%	4.68
Scary	20.5%	28.8%	29.4%	14.7%	6.7%	4.6

“Rushed” is the highest rating description of the CBD’s atmosphere, with over 50% rating 7 or over out of 10. Second top rating is “positive” with over 40% agreeing that’s the CBD’s atmosphere. Least rating atmosphere is “scary”. Although 21% rate they agree it is a scary atmosphere for them, reflecting diversity in peoples’ views on the CBD.



# Environment factor ratings



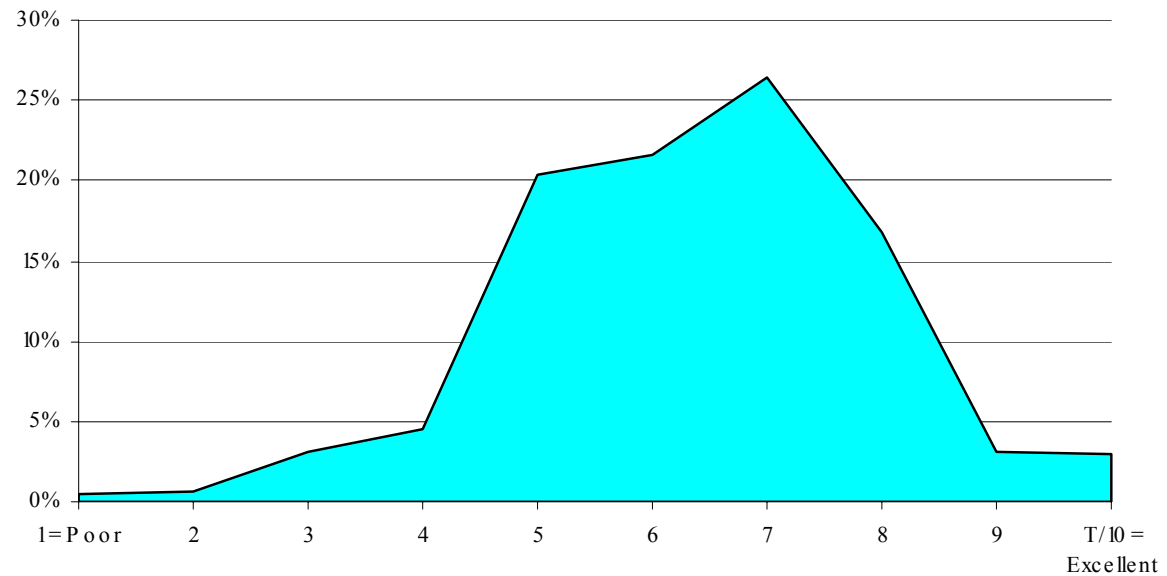
People rate the private attractions in Auckland highest, city-provided social and cultural aspects in the middle, and infrastructure lowest.





# CBD events

How do you rate the events in the central city?

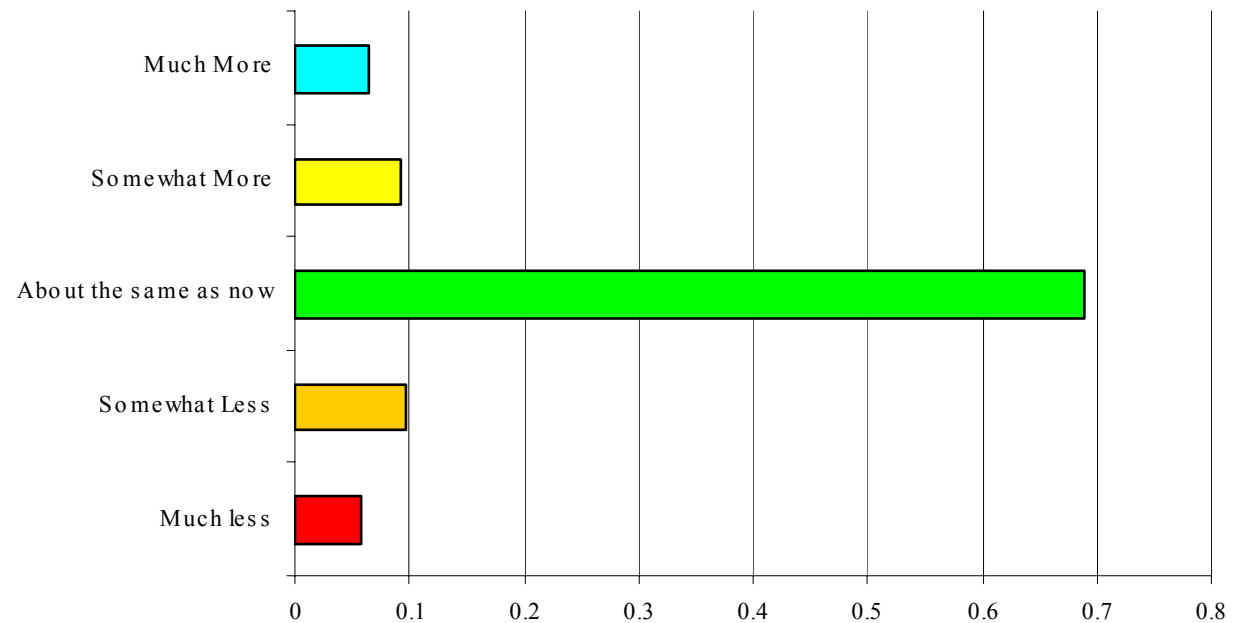


85% of people rate the events in the central city between 5 and 8 out of 10. The average rating for events is 6.37.



# Future use of the CBD

In the future, do you think you will use the central city:

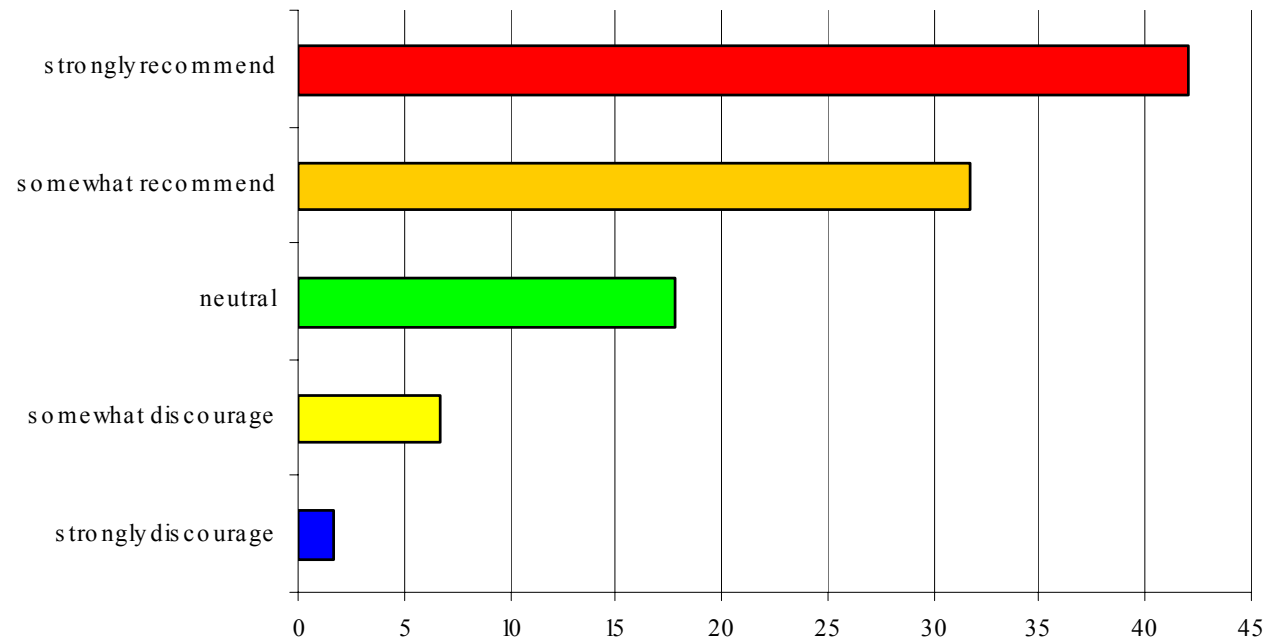


Nearly 70% rate their future use of the CBD about the same as now. 15% sit either side, saying they'll either use the CBD less, or more in future



# Recommendation to others

How likely would you be to recommend to a visitor that they visit the central city?



73.7% say they would strongly/somewhat recommend to a visitor that they visit the central city



# Summary

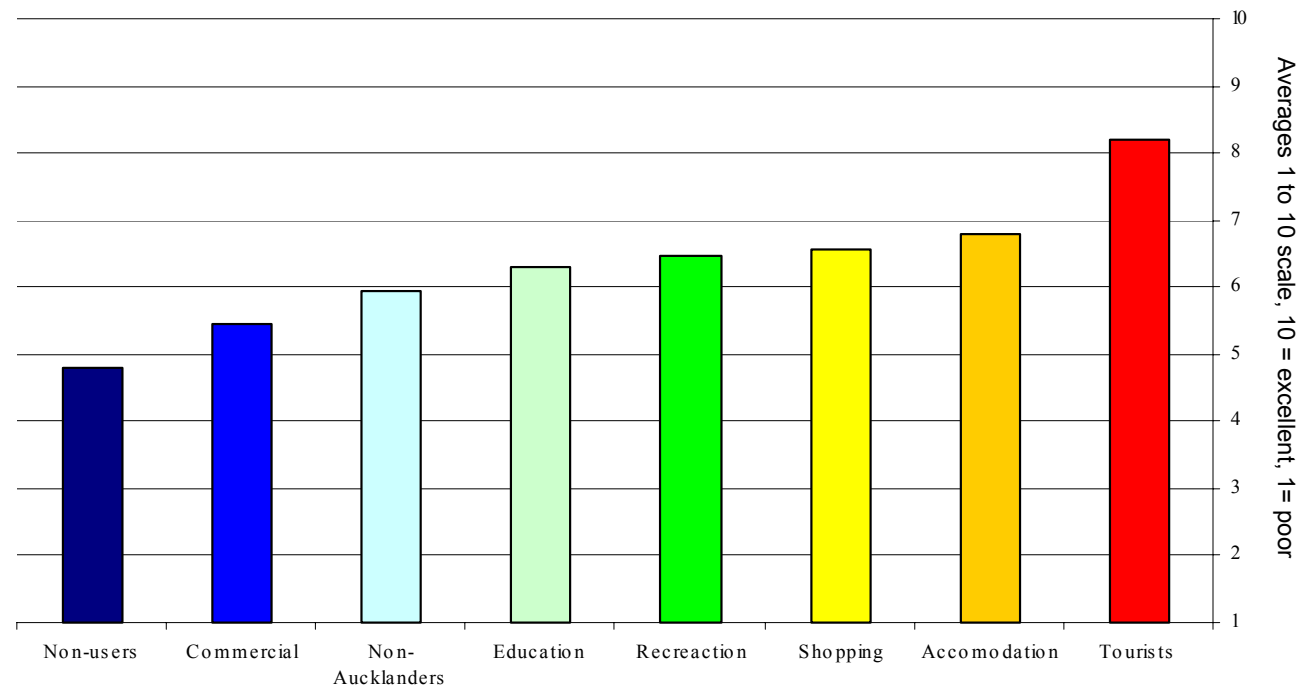
- People rate their enjoyment of the CBD a moderate 6 out of 10. The majority of people do not identify with the CBD, but most people summarize their view of their CBD with a positive word
- The atmosphere of the CBD rates similarly to enjoyment at 6 out of 10. The most common descriptions of the CBD's atmosphere are rushed, happening and positive. Some also rate it as scary
- The CBD's private attractions rate highest, city-provided social and cultural aspects rate in the middle, and infrastructure aspects the lowest. Events in the CBD rate in the middle ground (6.37 out of 10)
- In line with this type of enjoyment scores most people intend to use the CBD around the same as now. Although most people would recommend to a visitor to Auckland that they visit the CBD



## **Which factors are linked to enjoyment and use of the CBD**

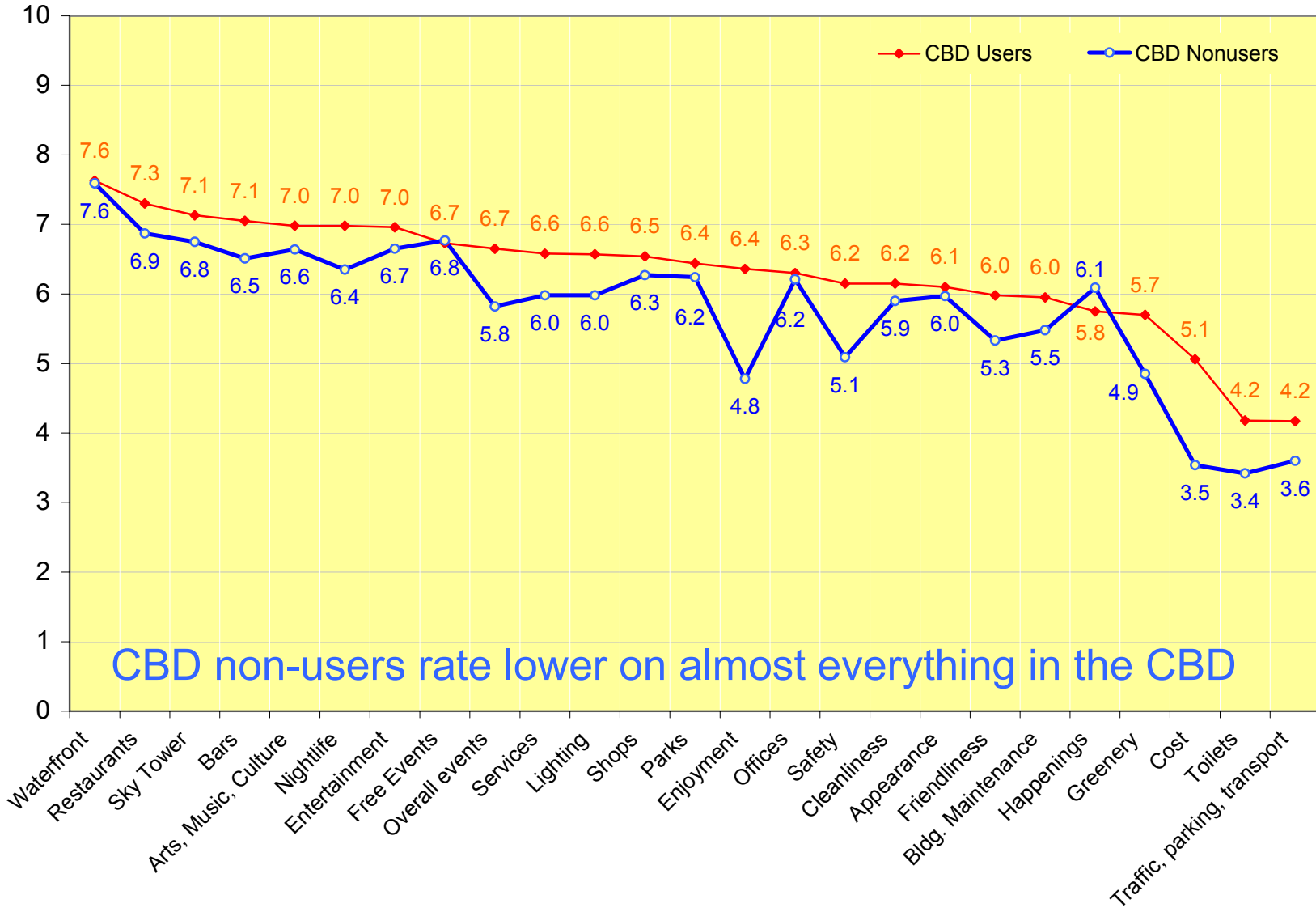


# Enjoyment of CBD by segments

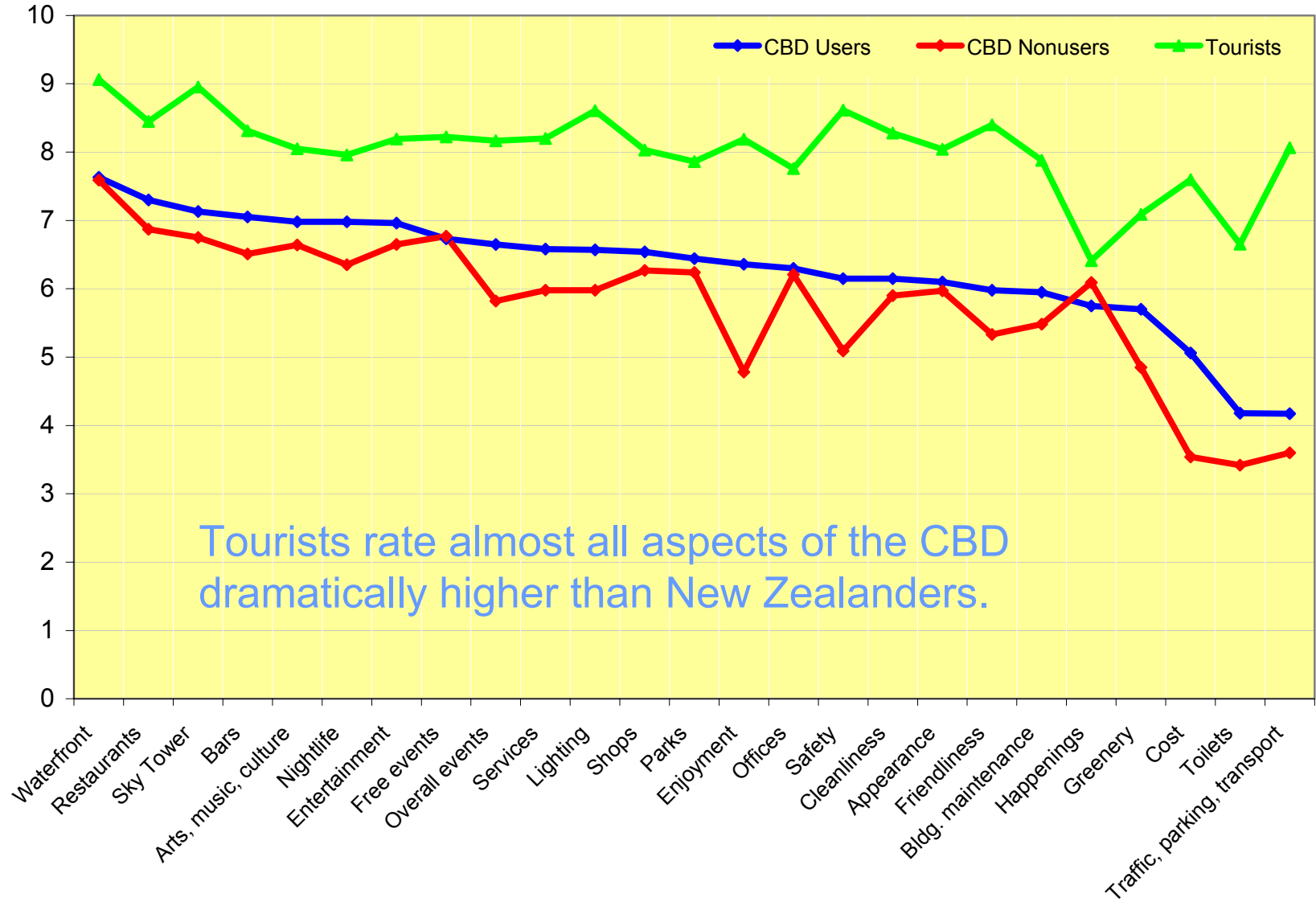


Enjoyment of the CBD higher for Tourists, averaging over 8 out of 10. Non-users, commercial, and non-Aucklanders using the CBD have lowest enjoyment – rating on average below 6 out of 10. Others using the CBD all rate between 6 and 7 on enjoyment of their use of the CBD.

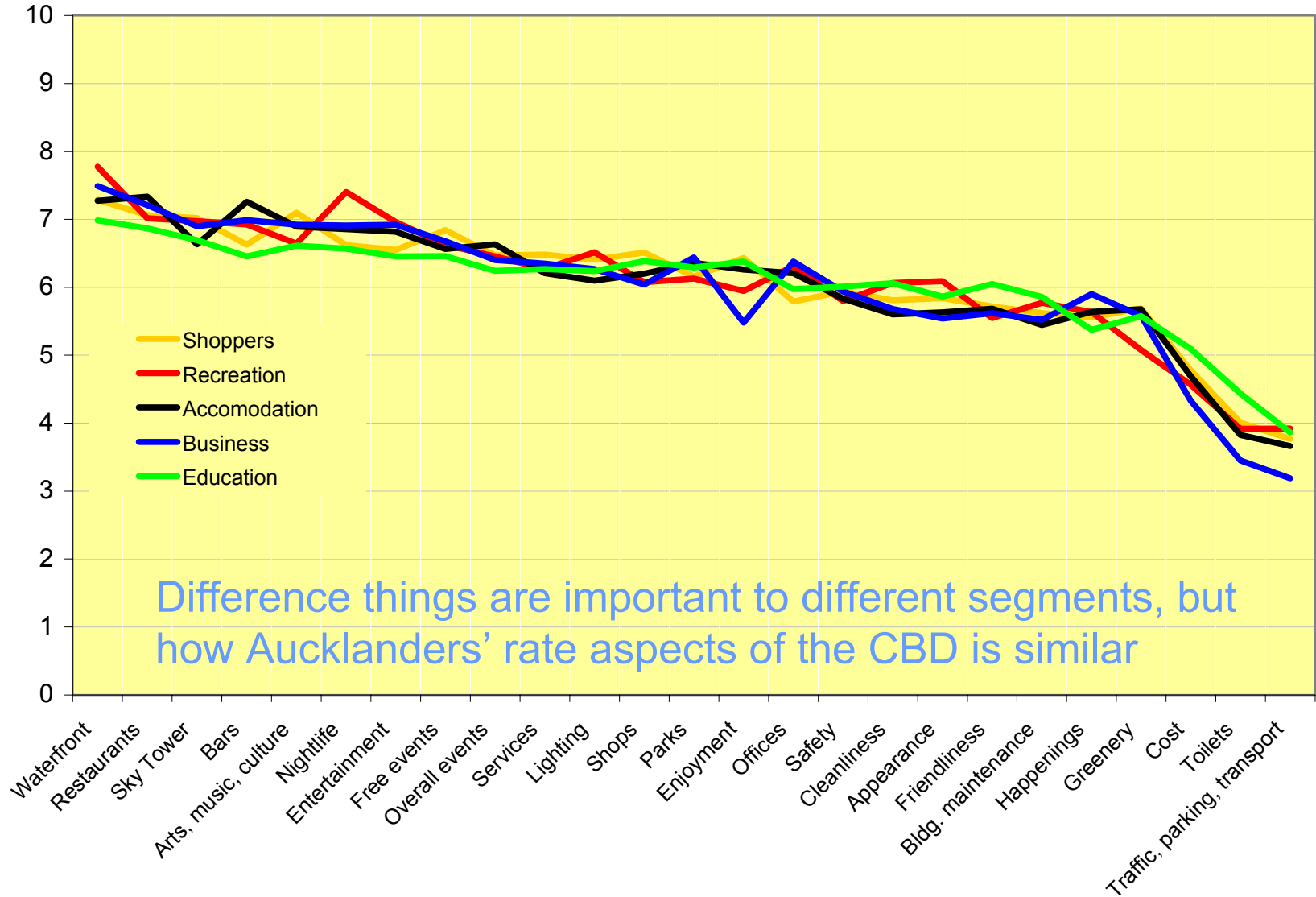
# Perceptions: Users vs. Nonusers



# We don't know how lucky we are ...



# Perceptions by segment





# Models explaining links to enjoyment

Two types of models are provided for each segment showing which factors are linked to peoples' enjoyment of the CBD

## –Bivariate correlation charts

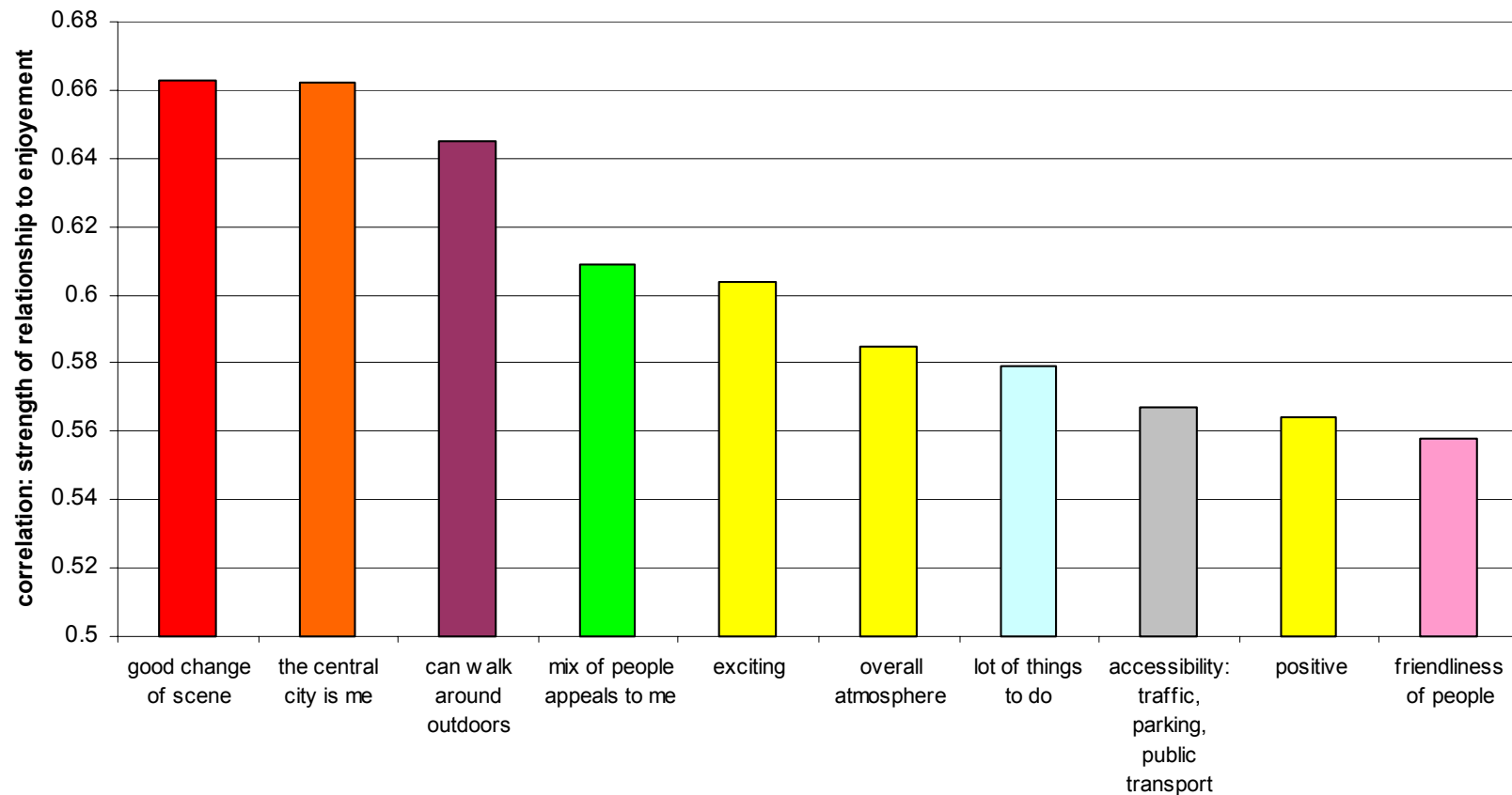
- These models show the top ten factors linked to enjoyment of the CBD by segment. They allow us to see some of the richness and complexity linked to enjoyment of the CBD
- Technical note: the size of the correlation indicates the strength of the relationship between the factor and enjoyment of the CBD. Where for example there is a strong positive correlation to atmosphere, this means as people score higher on atmosphere many also score higher on enjoyment of the CBD. Although displaying a relationship to enjoyment, correlation does not explain causation and needs to be read this way

## –Multiple linear regression models

- These models show which factors can predict peoples' enjoyment of the CBD. They illustrate that although many factors are linked to enjoyment a small number can predict their enjoyment of the CBD
- Technical note: The numbers beside each factor are standardized coefficients, which show the strength of the effect on enjoyment. That is, the higher the number beside the factor, the strong it is in predicting CBD enjoyment



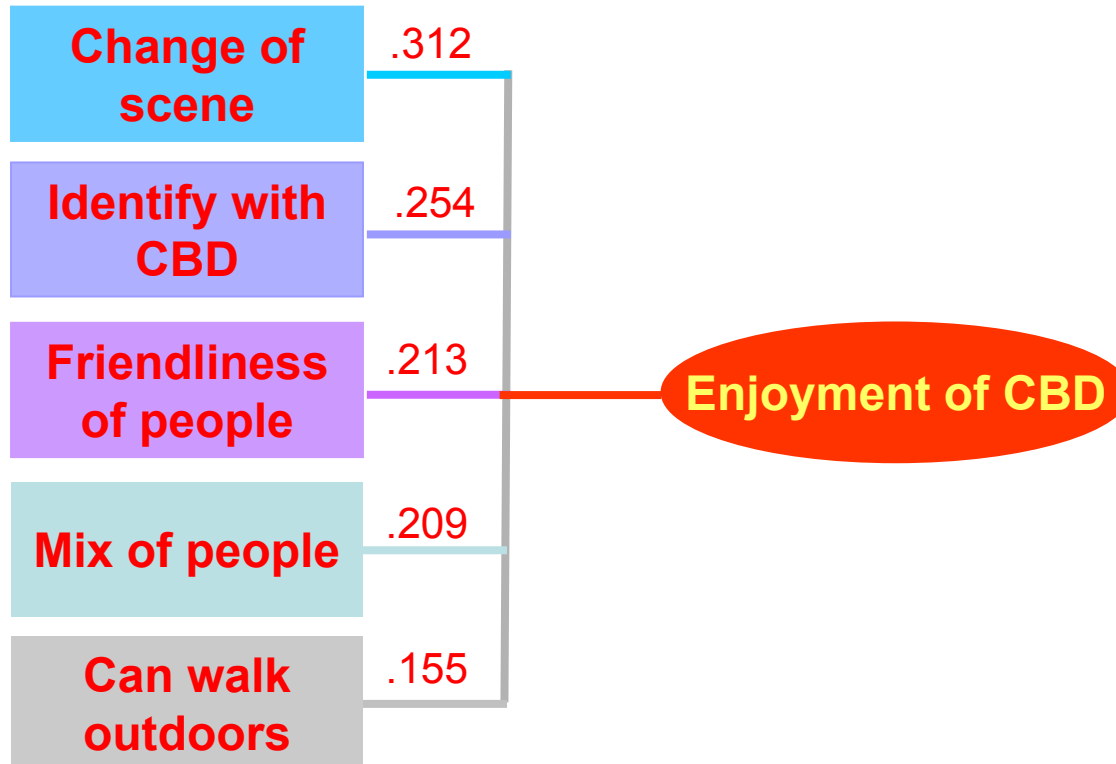
# Factors most strongly related to enjoyment: recreation



Providing something different from peoples' normal environment (change of scene) is important in peoples' enjoyment of the CBD. Also important is that people feel they identify with it and like the mix of people, and also can walk outside.



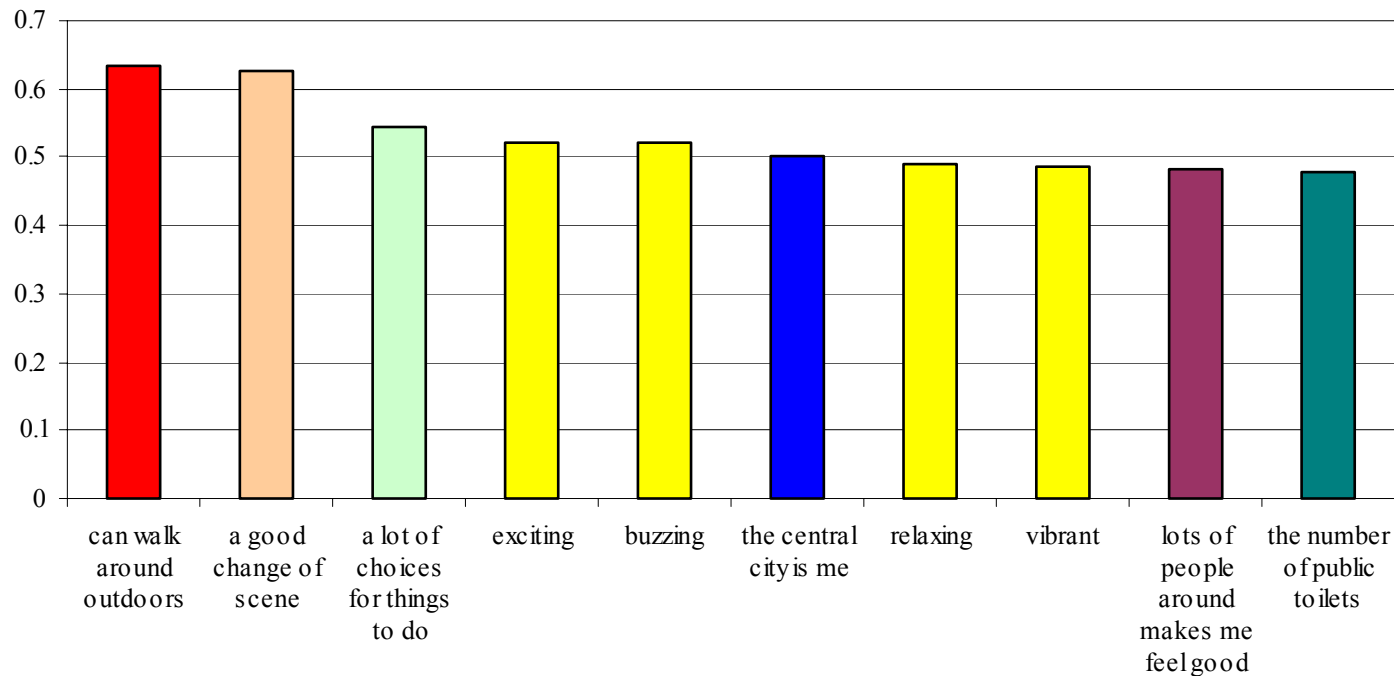
# Enjoyment drivers: recreation



71% of recreational enjoyment of the CBD can be predicted by these 5 factors. Most influential is the paradoxical mix of providing people something different (change of scene) followed by something people feel they can identify with



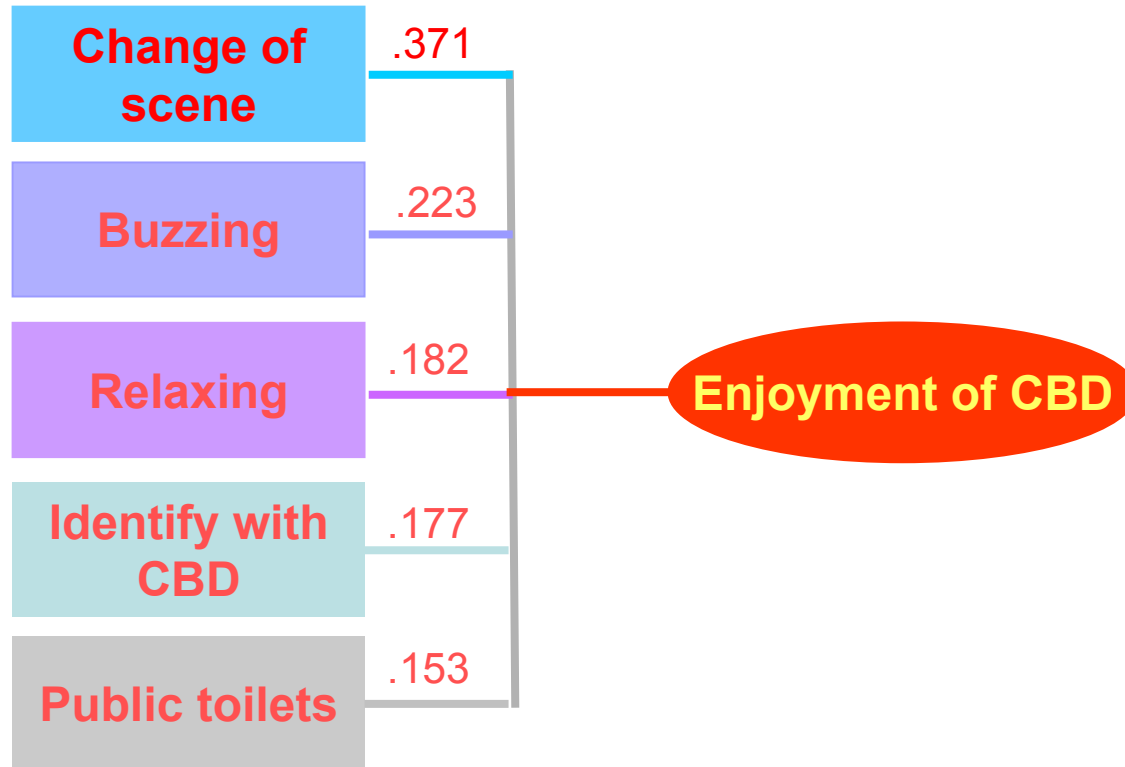
# Factors most strongly related to enjoyment: shoppers



For shoppers atmosphere more closely linked to enjoyment with 4 of the top 10 factors (in yellow) variations of atmosphere. Shoppers enjoyment also closely linked to enjoying being around lots of people, and the number of public toilets in the CBD



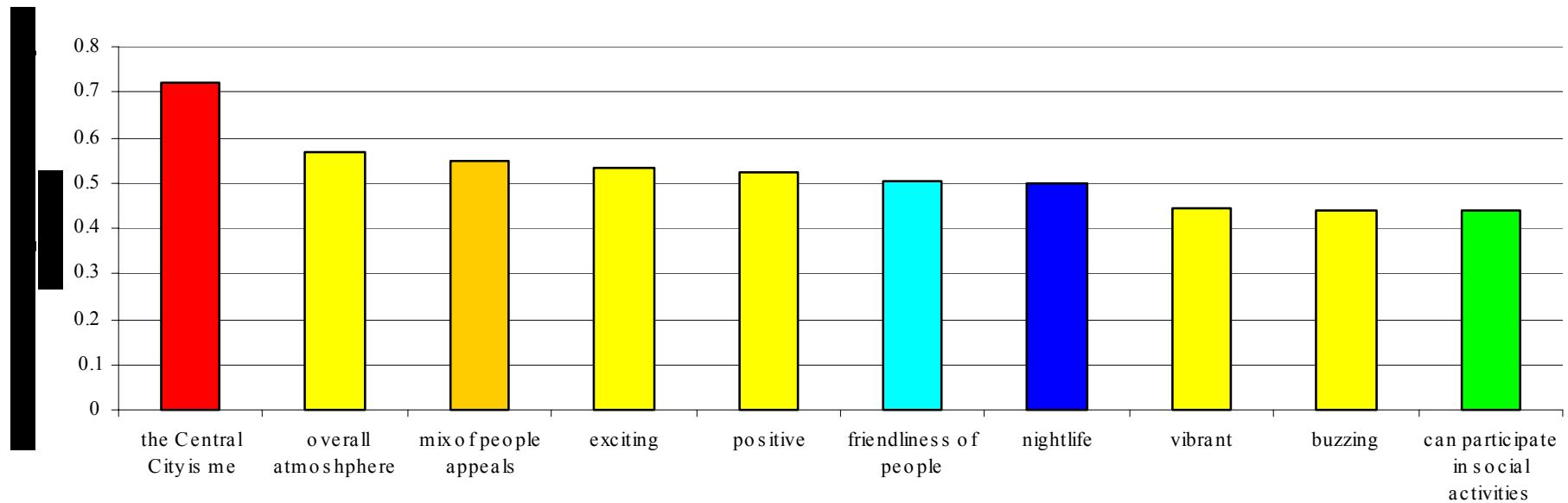
# Enjoyment drivers: shoppers



63% of shoppers enjoyment of the CBD can be predicted by these 5 factors. Most important is the change of scene, followed by an atmosphere which is buzzing and relaxing.



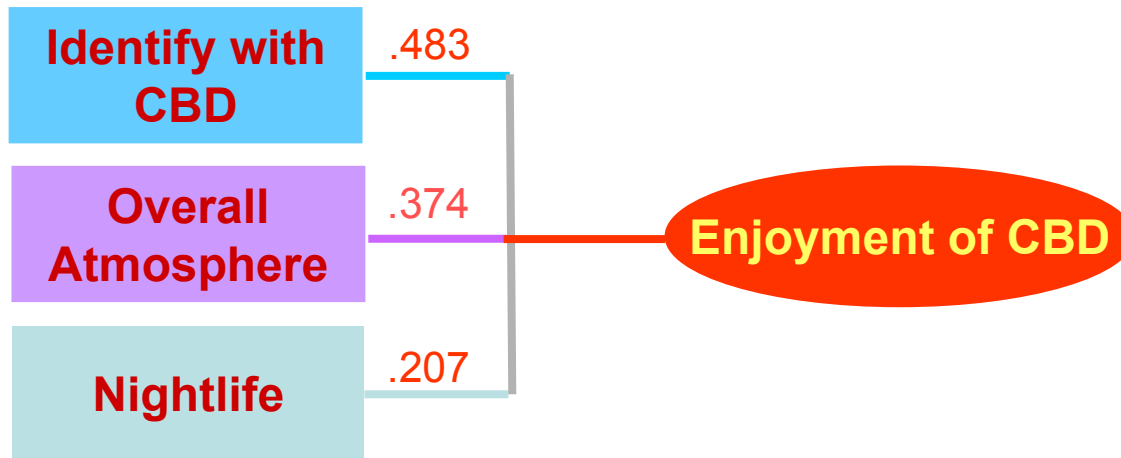
# Factors most strongly related to enjoyment: business



Being able to identify with the CBD is the factor most closely linked to business peoples' enjoyment of the CBD. Atmosphere also closely linked, 5 of the top 10 factors (in yellow).



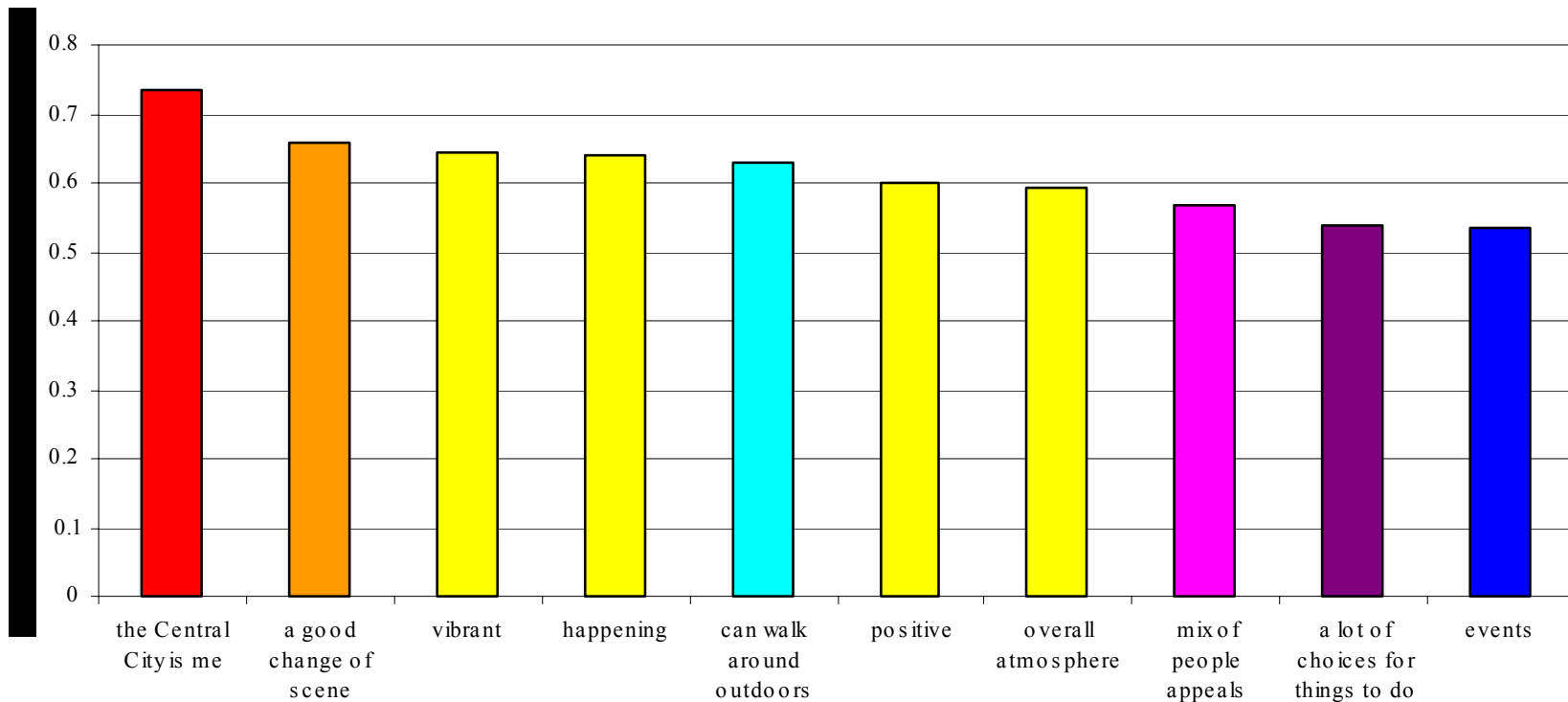
# Enjoyment drivers for business



Being able to identify with the CBD, having an excellent atmosphere, and excellent nightlife, can predict 68% of business peoples' enjoyment of the CBD.



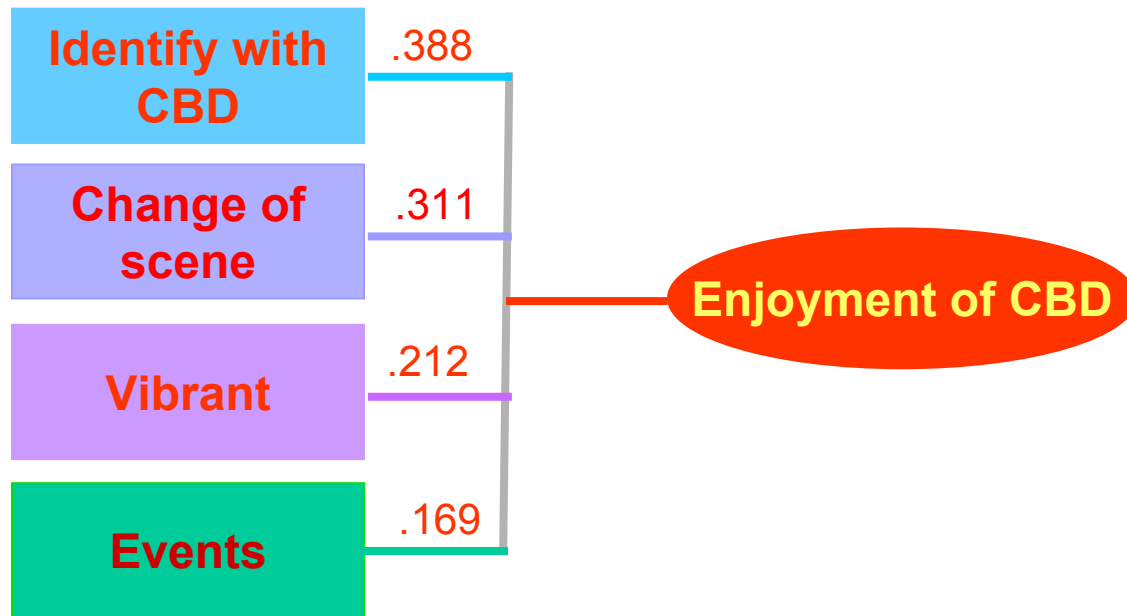
# Factors most strongly related to enjoyment: accommodation



Like other groups accommodation users enjoyment of the CBD closely linked to things like identifying with the CBD, feeling of a change of scene and atmosphere. Also events rate for accommodation users of the CBD



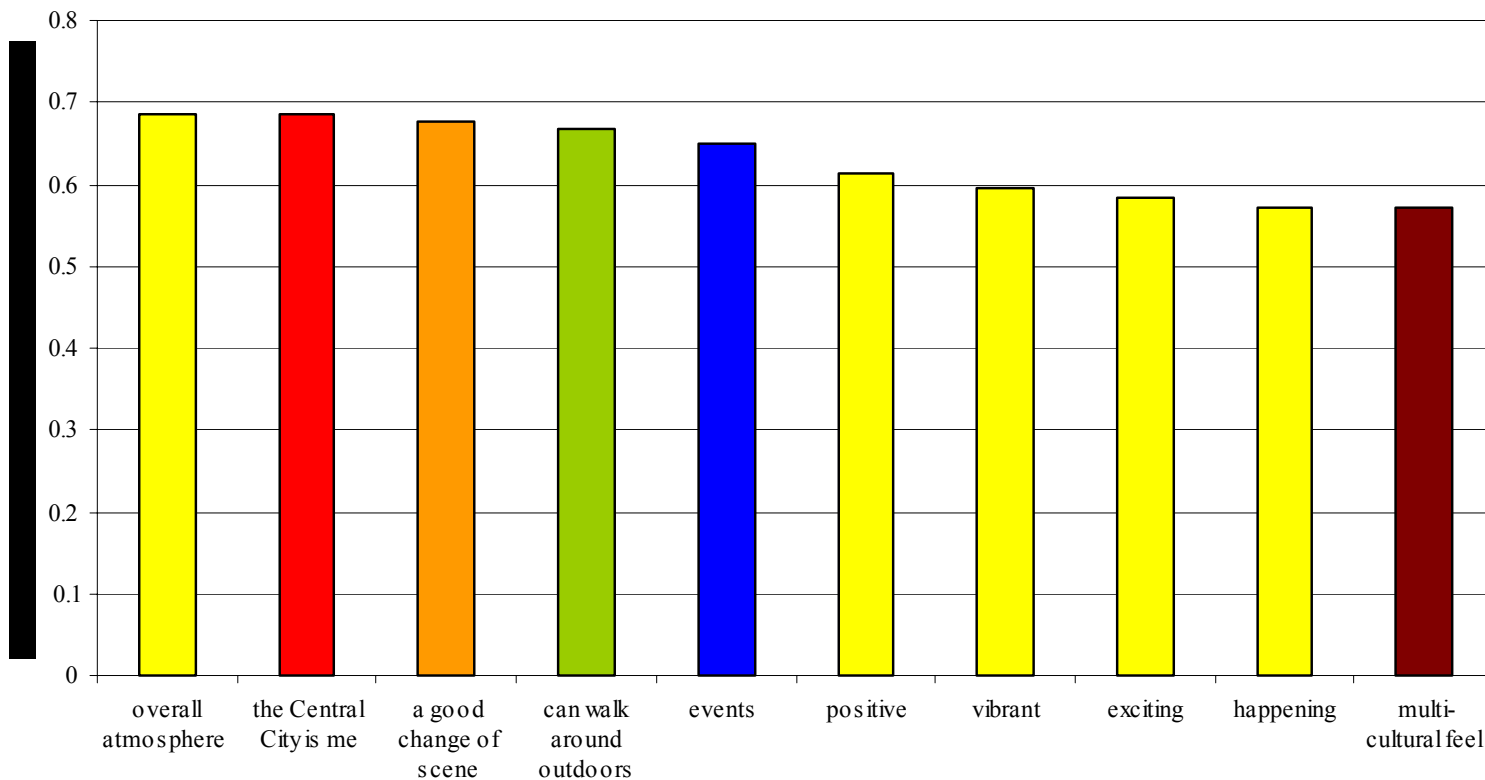
# Enjoyment drivers: Accommodation



74% of accommodation users' enjoyment of the CBD can be predicted by identifying with the CBD, feeling of a change of scene, vibrant atmosphere, and events in the CBD



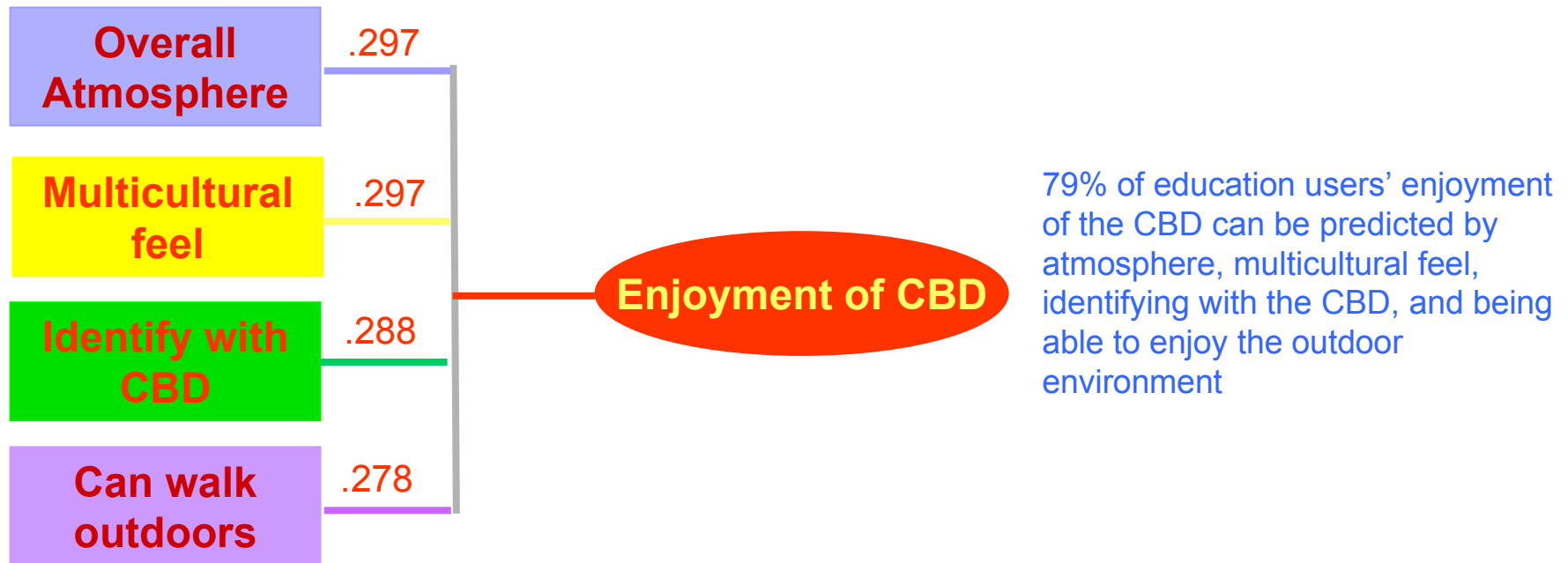
# Factors most strongly related to enjoyment: education



Education users enjoyment of the CBD linked first and foremost to atmosphere (5 of the top 10 factors in yellow above). Unlike other groups educational users enjoyment of the CBD closely linked to the multi-cultural feel of the CBD

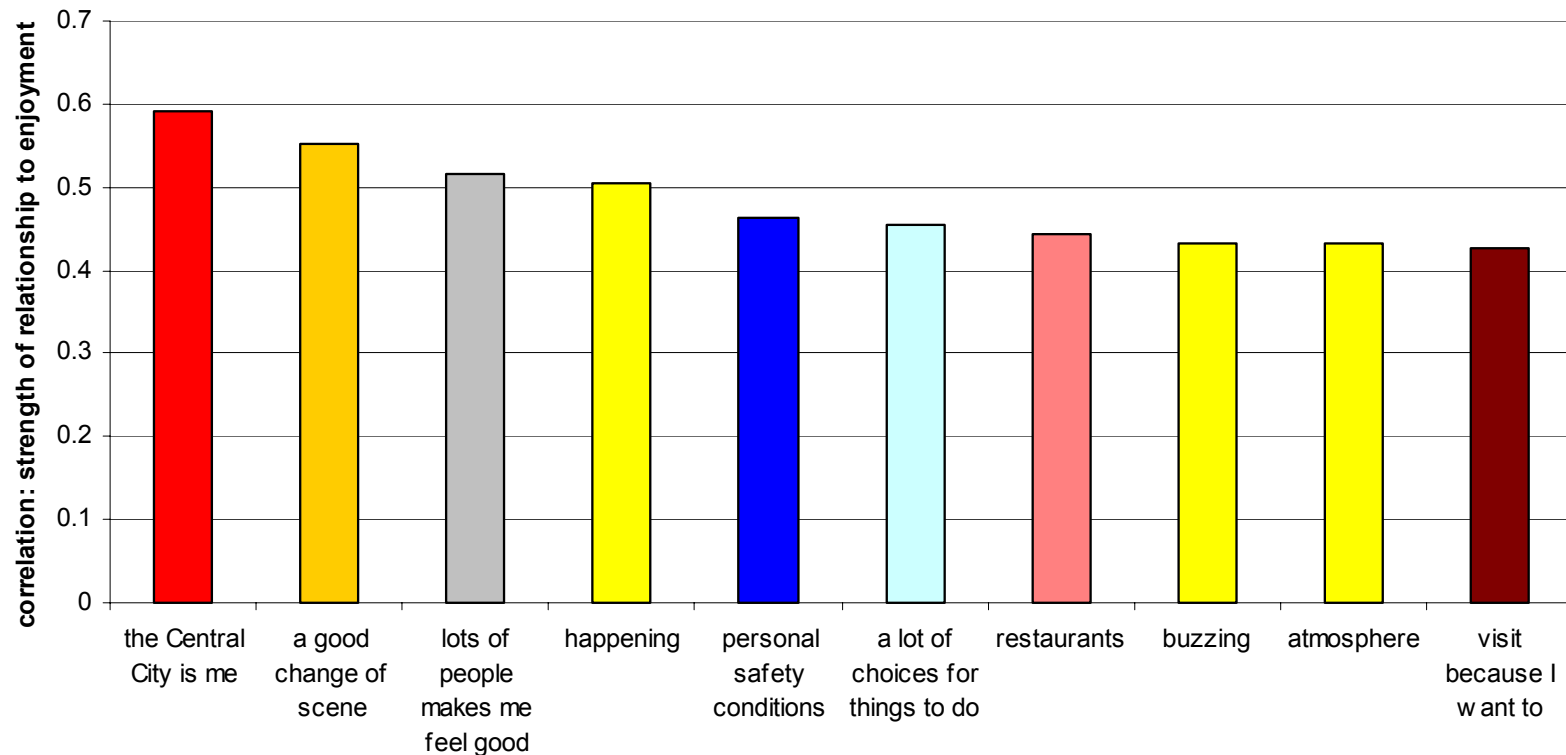


# Enjoyment drivers: education





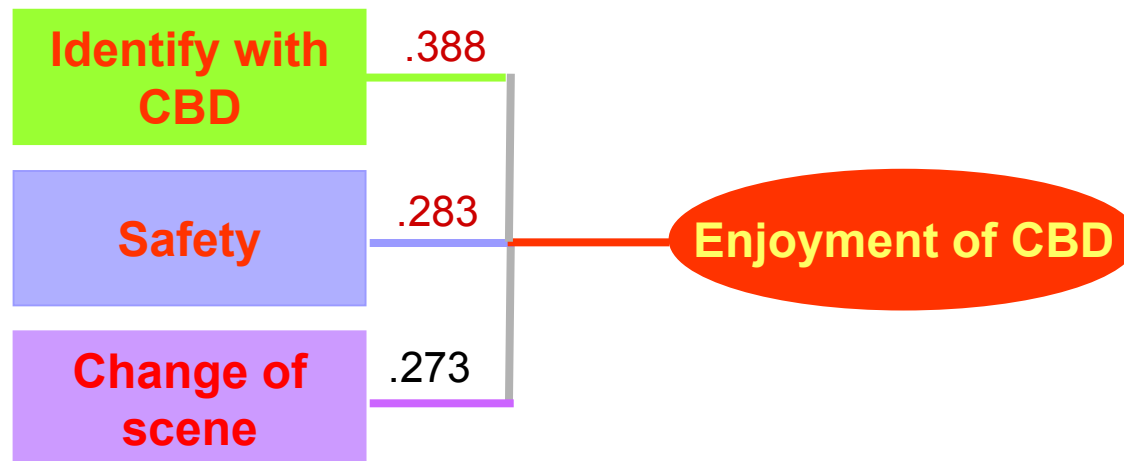
# Factors most strongly related to enjoyment: tourists



Unsurprisingly, a change of scene rates links closely to tourists' enjoyment. But so too does identifying with the CBD, showing the paradoxical nature of peoples' enjoyment of the CBD. Unlike other groups, personal safety conditions closely linked to tourists' enjoyment of the CBD



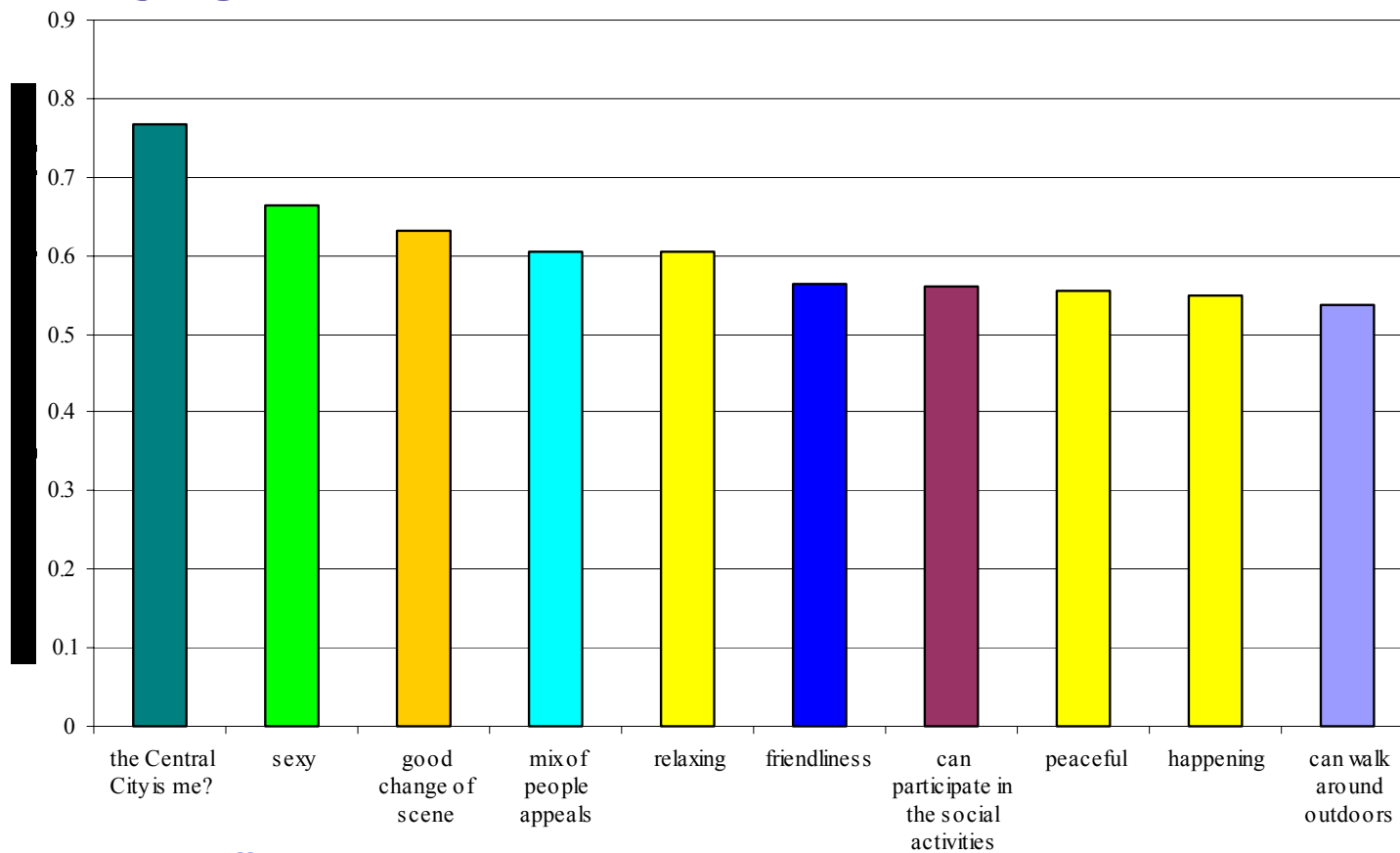
# Enjoyment drivers: tourists



56% of tourists' enjoyment of the CBD can be predicted by identifying with the CBD, personal safety conditions, and the change of scene the CBD provides them



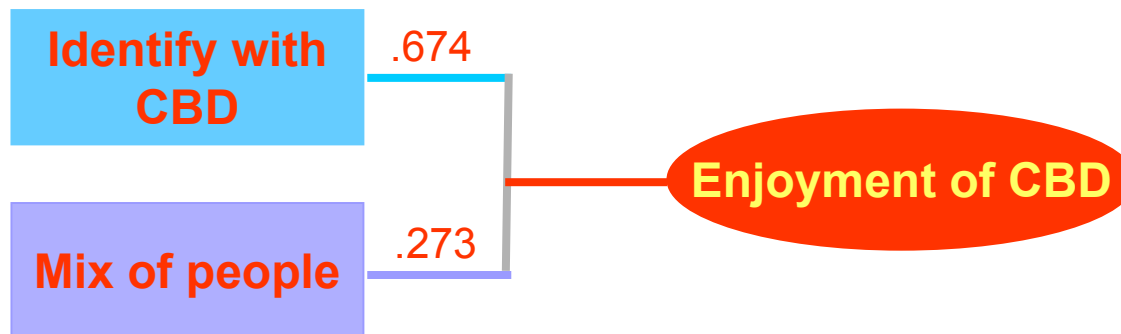
# Factors most strongly related to enjoyment: non-CBD users



The key differences with non-users is that what's linked to their enjoyment (or lack of) of the CBD is a "sexy" atmosphere, mix of people in the CBD, friendliness of people, the feeling of being able to participate in social activities of the CBD



# Enjoyment drivers for non-CBD users



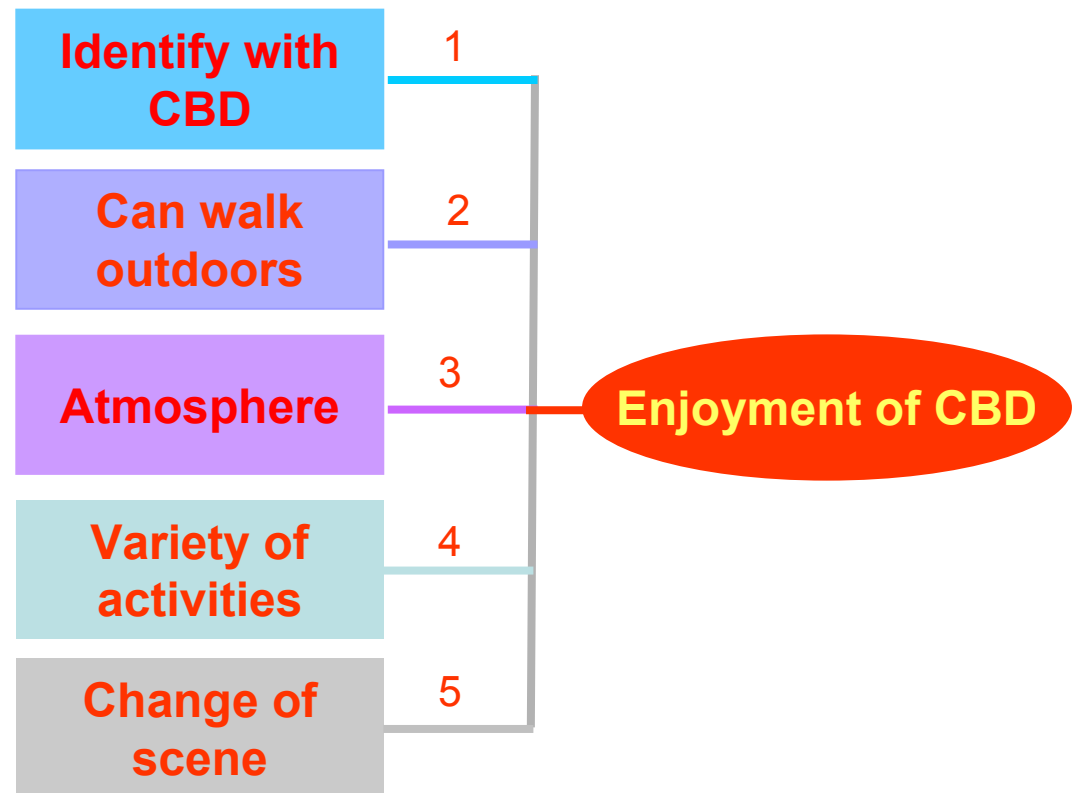
71% of non-users' enjoyment of the CBD can be predicted by their identification with the CBD, and very similarly the mix of people in the CBD



# Common denominators in enjoyment drivers across segments

## Common denominators for most people:

- People factors critical to creating enjoyment
- Infrastructure facilitates, rather than creates enjoyment of CBD





# Summary

- Tourists enjoy their visits to the CBD much more than locals. Tourists rate almost all aspects of the CBD dramatically higher than New Zealanders
- Locals who enjoy the CBD least are non-users. CBD non-users rate lower on almost everything in the CBD
- For Aucklanders who use the CBD different things are important to different segments, but how they rate each aspect of the CBD is very similar
- Across different segments there are common denominators driving enjoyment of the CBD: the change of scene the CBD provides people, the atmosphere of the CBD, a feeling of being able to identify with the CBD, and an environment that allows people being able to walk outdoors
- These common denominators at first do look paradoxical: “a change” and “identify with it”. But this does make intuitive sense: people enjoy something different but probably only if it is something they feel they can relate to
- There are also a number of idiosyncratic factors, dependent on segment, closely linked to enjoyment of the CBD. Examples are the number of public toilets for shoppers, friendliness of people for recreational users, safety for tourists, the multi-cultural feel of the CBD students, and events for accommodation users
- An important generalization possible is that the most visible and talked about aspects of the city – the infrastructure – have the weakest links to enjoyment of the CBD. Factors such as providing a different environment and atmosphere link much more closely to CBD enjoyment. This holds true for both users and non-users of the CBD



# Minority groups



# Homeless

- Core group of 200 to 300 homeless
- Attracted to the CBD as their needs can be met there (food, drink, entertainment)
- Can also be invisible (people less tolerant in suburbs)
- Relieved by the fact that the CBD provides a place for them but feel like an unwanted nuisance
- Dislike harassment by police or security
- Key needs are places to store their gear, access to shower facilities, housing
- Need to be acknowledged as people – provided with some self esteem



# Maori

## Ngati Whatua

- Tangata whenua for the CBD
- At this stage haven't given an interview for the project

## Ngati Poa

- Historically resided in Auckland before Ngati Whatua
- Some older people now feel unwelcome in CBD
- Want their mana/historical status restored
- Want recognition of their history with some symbols/landmark/education
- Also heritage sites protected in the CBD
- At same time don't want to hold back progress



# Maori impressions of the city

City says to you:	Your response:	CBD in a word	Age
Too many Asians	Yeah, I know.	Normal	19
Come in and enjoy yourself	I'll try	happy	20
Clean me, help me	I'll try	ashamed	21
Come into town.	not a problem, Ill be there	Adventurous	24
Come on in and enjoy yourself	Be there soon.	rushed	27
Hello again.	Hello	small	33
Look around	OK	Rushed	33
Bring your wallet	Not today	Tired	34
People in the city don't care	I care	bored	34
Old and tired.		Tired.	35
Come and enjoy live and excellent night life	I'll be there tonight	I'm alive and living	36
You're late for work	I'll get there when I get there	cruisey	36
Wow! Look at me--don't I look great?	You look neat as well.	precious	41
Come and enjoy yourself	No way!	Suffocated	52
Stay in K-road	Gladly	Like Mole	54
I'm alive, I'm vibrant, I'm here, if you need anything just ask. You can achieve any thing you want.	Thank you and good to be "home", you have been good to me.	alive	59
Take me as you find me	I would make the most of the	exhilarating	67
		I am proud of the city	73
There is a lot more you could do if you had more time and energy, you don't use me as well as you might	I will try harder		77

## Questions:

• I'd like you to imagine for a moment that the CBD is talking to you. What would it say?

• And, what would you say in return to the city?

• If you could give me one word that describes how the central city makes you feel, what would it be?



# Pacific Island

- Auckland is biggest Pacific Island city in the world
- Yet nothing Pacific Island at all inside the CBD
- Pacific Island people gradually getting driven out of the central area by higher real estate prices
- Similar to Maori, older people feel quite unwelcome
- Exception is when Pacific Island events
- Would prefer to do something together with CBD
- Tend to like space, areas like parks and squares
- Younger people enjoy socializing in the CBD
- Problems with Pacific Island people and the Casino
- Want some sense of belonging also in the CBD
- Want visible cultural symbols that validate/ welcome them



# Marginal youth (definition: youth police categorize as at risk)

- Around 20 hardcore kids living on CBD streets
- Another 500+ kids coming from outside into CBD
- There were 400 11 to 17 year olds picked up by Police last year in CBD (including many girls)
- Trouble at home, broken-down relationships with families, and with communities
- CBD like a magnet for meeting up with others in same predicament
- Many are committing crimes to get by
- CBD gives them a sense of power and belonging somewhere
- Experts suggest patching up home/community issues is solution. They do not recommend accommodating/encouraging more problem juveniles into CBD



# Prostitutes

- An estimated 4,000 prostitutes in Auckland
- Many of whom are using the CBD for business
- Most work in parlors, with few on the streets
- The CBD makes them feel tired and disappointed, but they also say the CBD exciting
- They'd like more facilities that make their life easier, or a legitimate place to go
- Examples: better healthcare for over 22 year olds, emergency accommodation for youth, public showers, would like a parking area (for work), a toilet with baby changing table, a resting room, a shooting gallery with needle exchange for taking drugs



# Gay, lesbian, transsexual

- Feel isolated in suburbs with high rates of depression and suicide
- Want safe, positive social environments to mingle with like-minded people
- Catered for to some extent in CBD (cafes, clubs, meeting places, and by Ponsonby area)
- Still receive discrimination/harassment in CBD
- Often young gay/transsexual preyed upon
- Street workers in dangerous situation (can't work in parlors, and some underage)
- Feel city inviting and grateful for that
- Would like further recognition – areas that validate their lives, places flagged as gay/lesbian/transsexual friendly



# Asian

- Feel quite welcome in CBD, like the CBD area
- Many shops targeted at Asian tourists
- At the same time feel unsafe even during the day on quiet streets/Fort St./K Rd/Parks
- There may be some unfortunate truths behind these feelings. Police suggest young Asians are a usual target for crime in the CBD



# Summary

## Minority group issues and needs variable:

- Pacific Islanders feel underrepresented in the CBD
- Gay/lesbian/transsexual need socializing places
- Asian people need better safety

## Common denominators:

- Emergency accommodation, showers and healthcare for the homeless and for prostitutes
- Validation. All minorities request validation or places that identify with them in the CBD



# Research summary: key points

## Objective One: area maps of CBD use at different times of the day and week

- Diverse pattern of CBD use across areas, times, user groups
- Areas near water heavily used, some areas used very little
- Some areas broad use, others like University more specialized use
- Most areas active day and night, but different activities and people using

## Objective Two: Understand how the CBD is currently perceived by people

- Moderate level of enjoyment of CBD
- Level of enjoyment varies by user group
- Tourists rate CBD highest, non-users lowest

## Objective three: models showing which factors affect CBD use or enjoyment

- Common denominators across groups in drivers of CBD enjoyment
- Also idiosyncratic factors by user group for level of CBD enjoyment
- Strongest factors linked to enjoyment of CBD not infrastructural
- Rather “softer” factors such as change of scene and atmosphere

## Objective four: Minority Groups

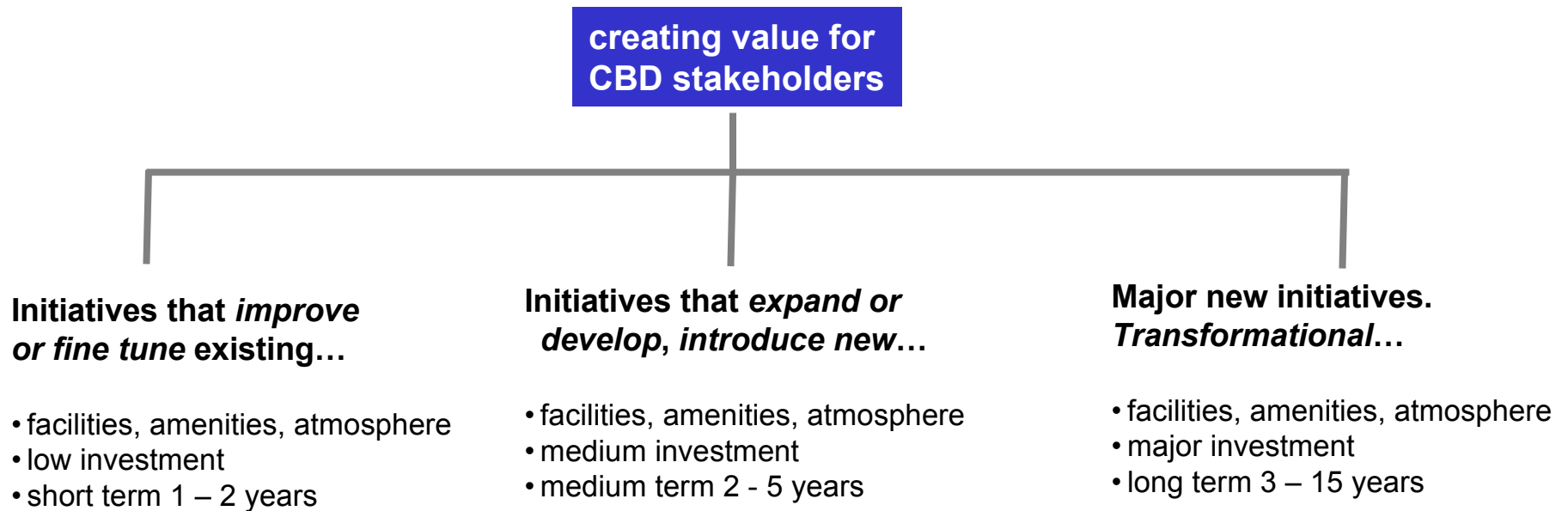
- Similar pattern to above. Common denominators across groups
- Also special needs relate to individual groups such as showers and emergency accommodation for homeless and prostitutes



# Strategic recommendations

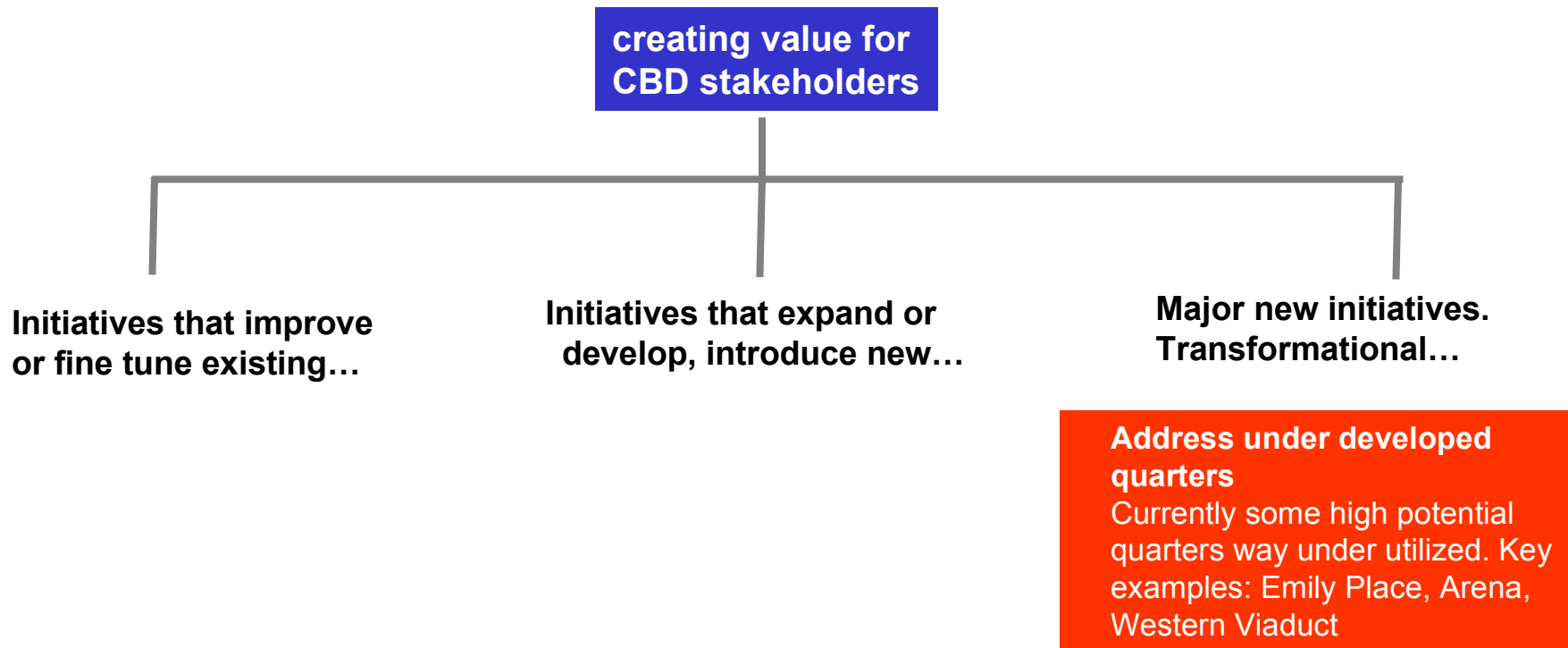


# Types of initiatives emerging



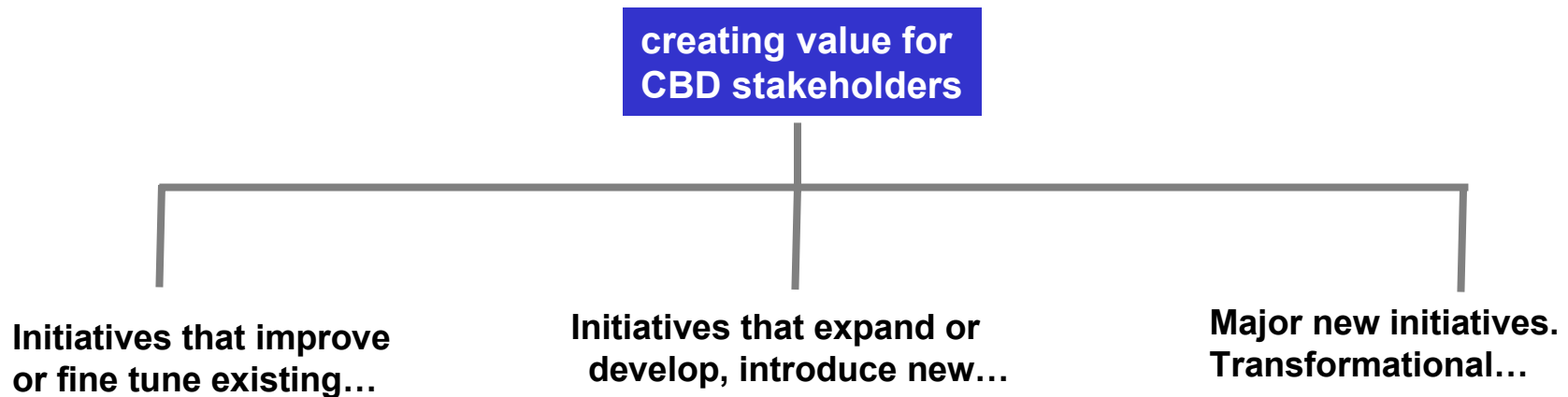


# Underutilized quarter development





# Balancing usage within quarters



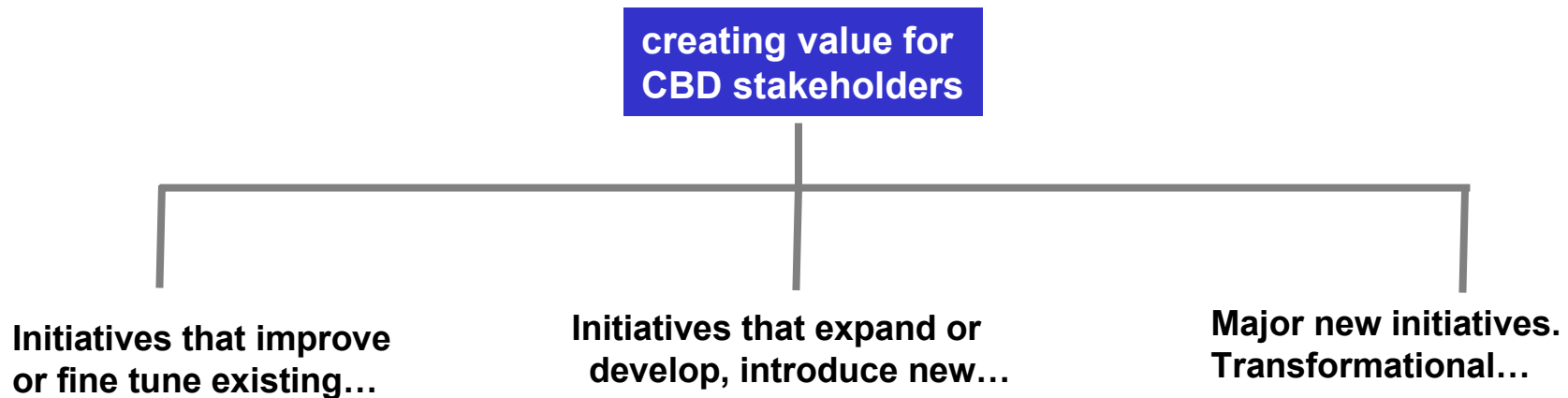
## Achieve better balances within quarters

Some quarters have conflicting rather than mutually supportive use within them. For example, the Viaduct's nighttime recreation focus alongside accommodation, and Aotea's entertainment centre in the evening with few very complimentary activities like restaurants. Unbalanced usage patterns throughout the day are also evident. The key example here is the morning concentration of activity in most quarters





# Amplify existing positives across different quarters

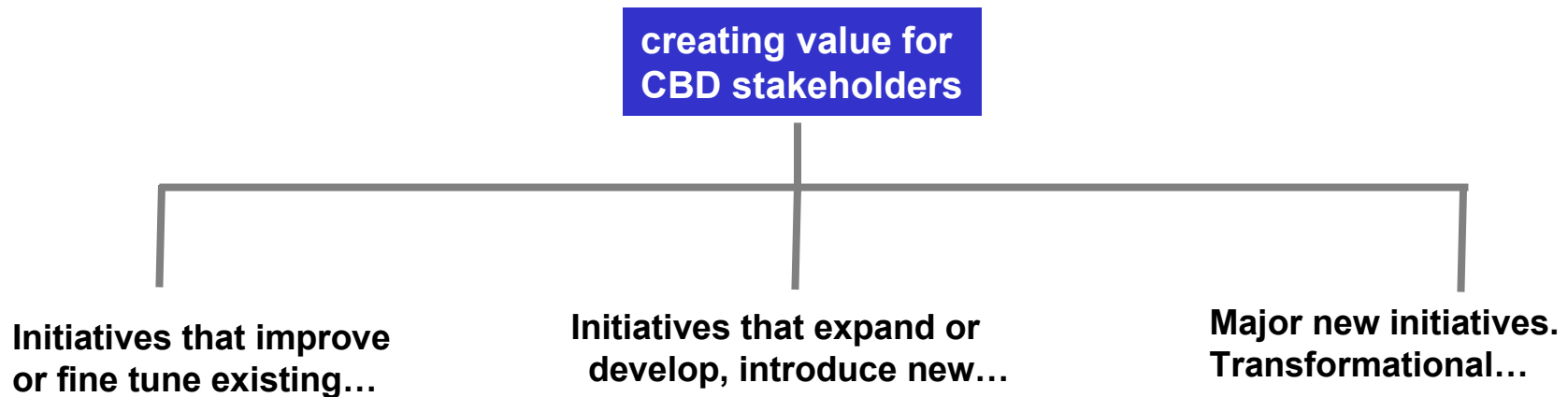


## Amplify existing positives across different quarters

The quickest wins will come from amplifying existing positives. Animation of existing well-rated activities likely to achieve this. Examples may be activities with a multicultural feel close to University quarter, lunchtime events for business people in the Westside quarter



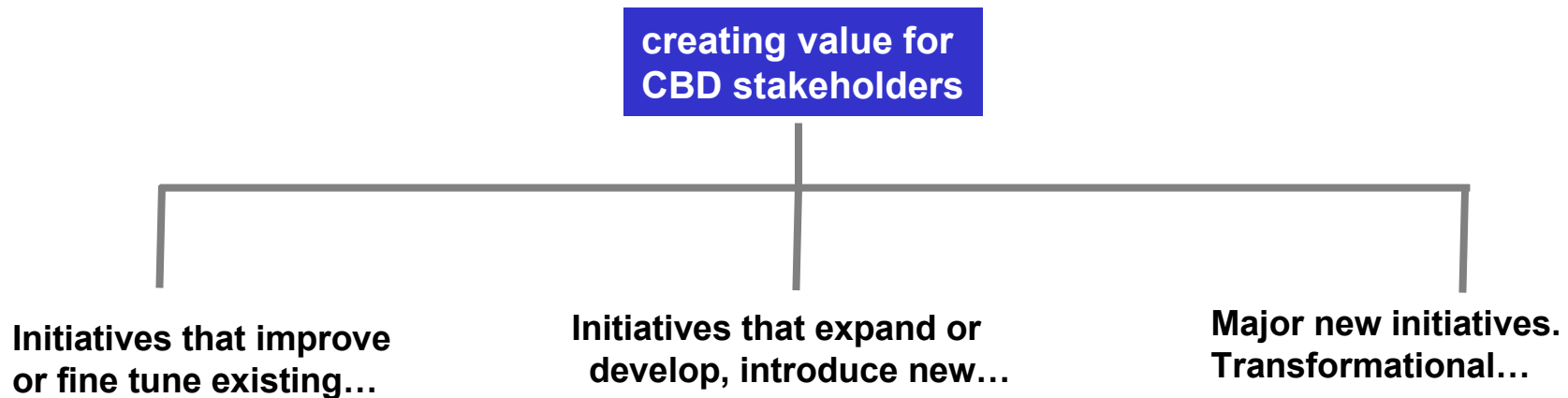
# Stronger linkages between quarters



## Develop stronger linkages between quarters

Some quarters currently islands of activity. One such example is the Nelson area with very diverse activities. At the same time it has low utilization, as it's hard to reach from other CBD areas. Something as simple as regular shuttle busses, for example, could correct this

# Alignment of Auckland City actions with user perspectives

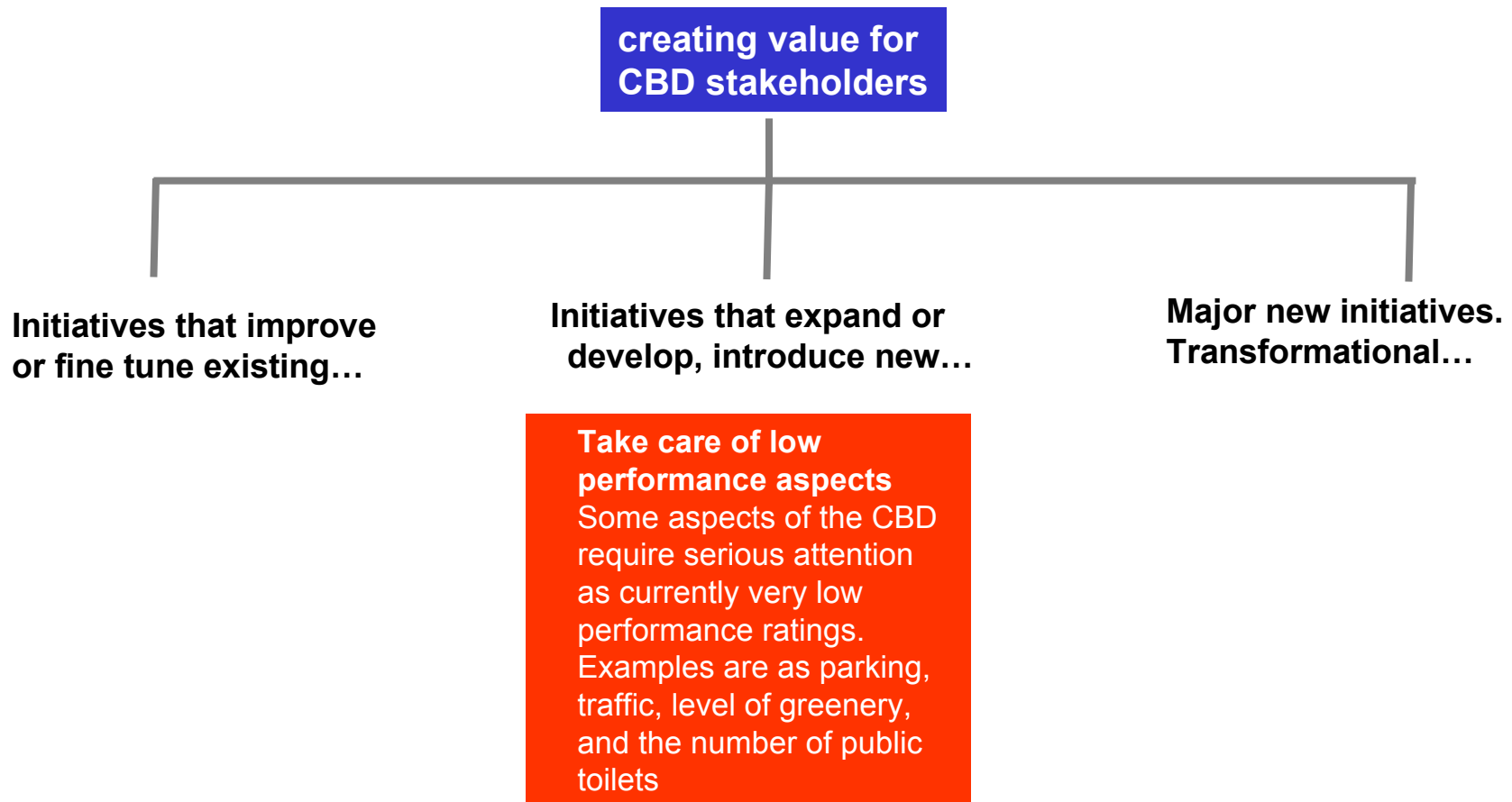


## Align Auckland City actions with users' perspectives

Currently only a moderate enjoyment rating of the CBD, except for tourists. To drive actions lifting enjoyment (and use) of the city, factors critical to enjoyment need to be explicit performance measures at Auckland City. For example, measures provided by this research can be used for assessment of likely impact of proposed strategy, measuring effectiveness of strategies, and measuring performance of teams. This will drive alignment of Auckland City's actions to producing what CBD users enjoy

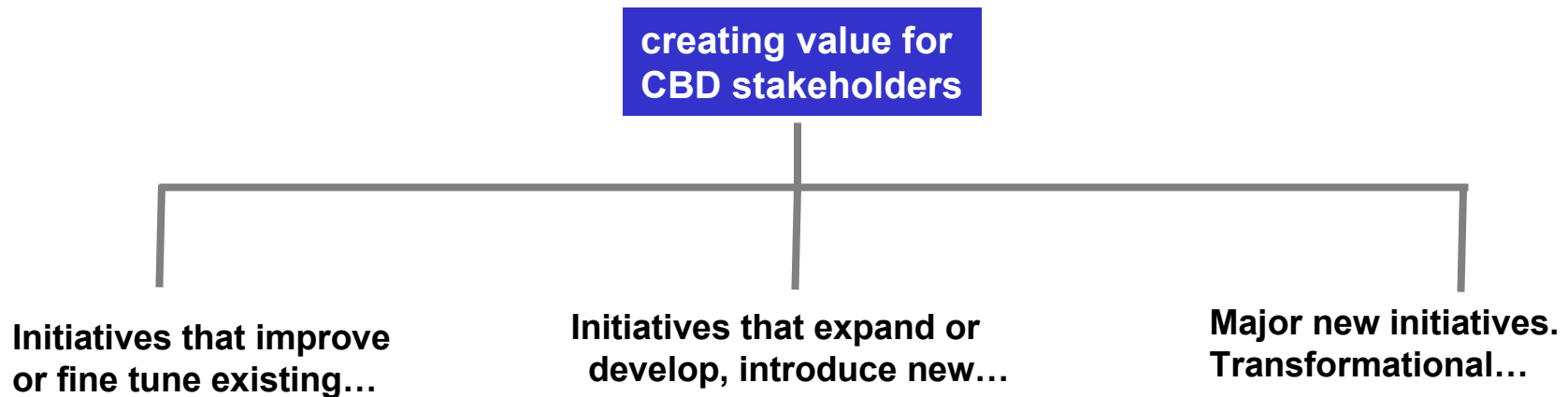


# Take care of low performance areas





# Leadership

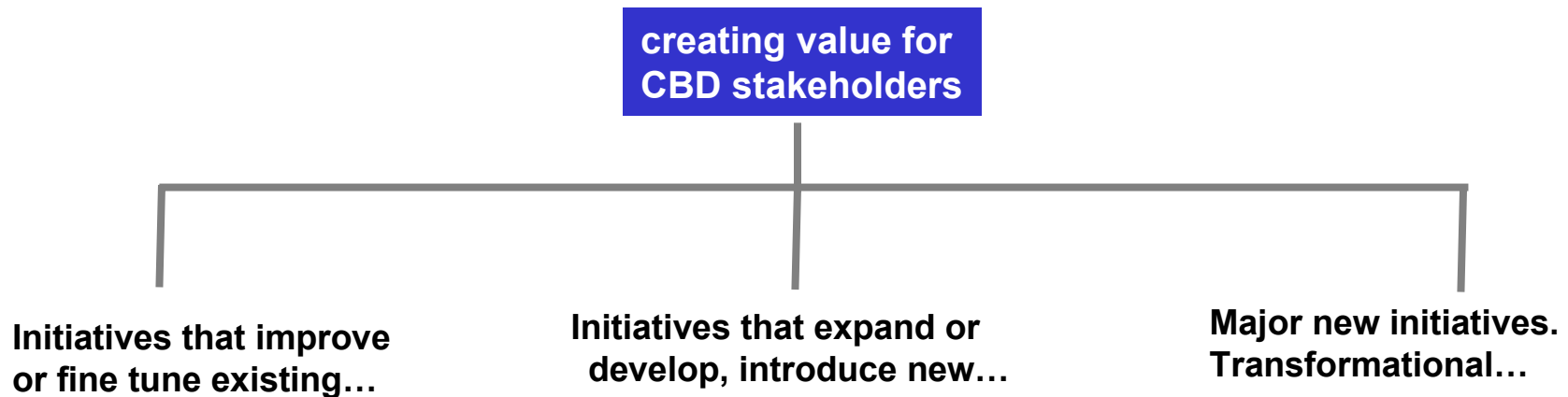


## Assume a leadership role

Someone needs to take a broad long term view of the city and develop plans for different areas. The private sector excels at delivery. But it cannot be expected to come up with coordinated projects that gel the CBD coherently together. Visions for different areas are required for this, which could be facilitated and co-invested in by Auckland City. The prototypical example of the result of an Auckland City led (and partnering in delivery) approach is the Viaduct



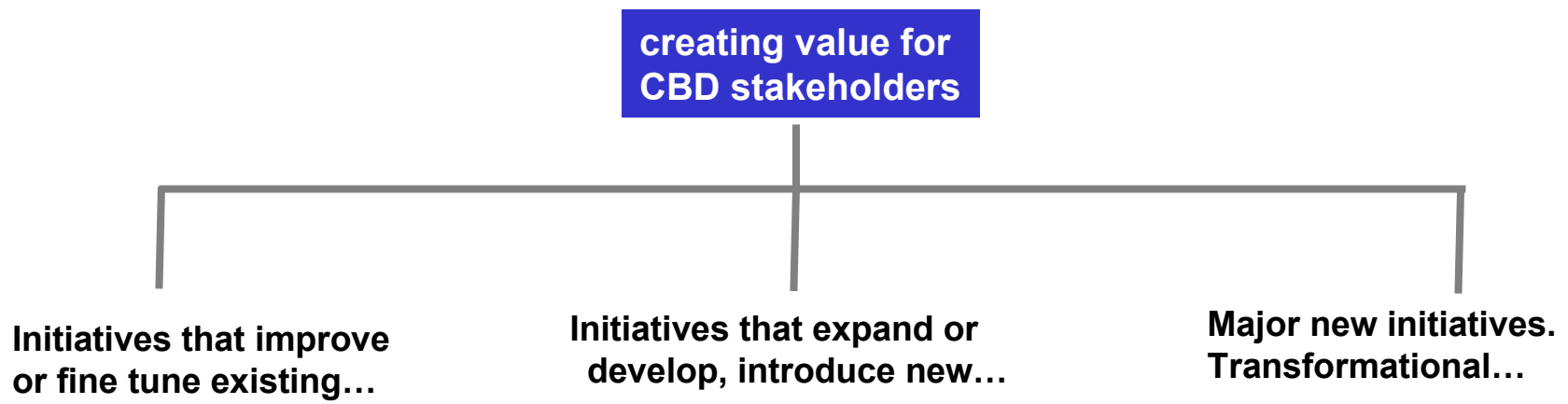
# Development of outside walking quarters



**Development of outside walking quarters for recreation and shopping**  
For recreation and shopping outdoor walking areas tie closely into enjoyment of the CBD. There's currently a little of this with Aotea and the Viaduct. More promenading will increase enjoyment (and use) of the CBD for shopping and recreation. Examples of successes in this offshore are cities like Copenhagen



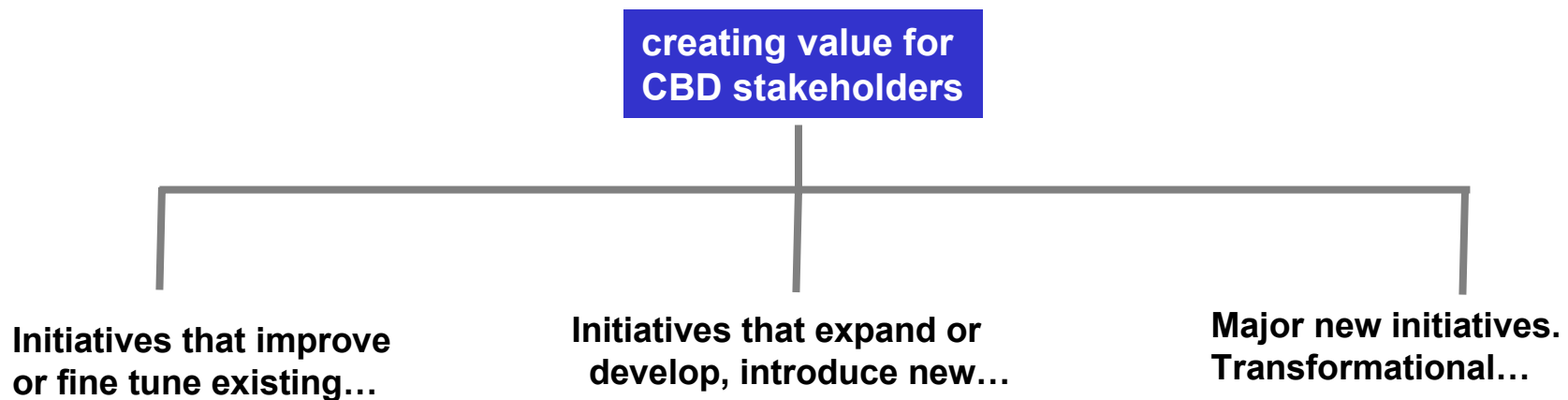
# Un-catered for minority groups with a critical mass of activity



**Establish a presence for minority groups with a critical mass of activity**  
One of the most important common denominators of CBD enjoyment is identifying with it, and it is clear some groups could be catered to much better in this regard. Pacific Islanders are one group. There are large numbers yet with no dedicated CBD presence for them



# Reflect diversity of CBD stakeholders, in non-conflicting ways



**Address CBD developments in a way that reflects diverse groups of stakeholders, but that simultaneously do not alienate certain groups**

Having CBD developments which reflect users, which enable them to identify with the CBD, is vital to peoples' CBD enjoyment. However, this can be a paradoxical area. Enabling identification with one group, can alienate another. Auckland City needs to either develop win-win diversity programs which support all. Or if not possible, balance out developments so different places reflect different significant groups. An example may be, where Auckland City supports developments for Maori in the CBD, say a Marae: these places should be designed for all to enjoy, or balanced out by other developments for the excluded groups



# Summary

Strategic recommendations cut across all aspects of city governance: infrastructure, economic, and social/cultural  
A CBD people enjoy, and would like to use more, is clearly a function of all these areas working well in unison

Specific recommendations are:

- Address under developed quarters
- Achieve better balances within quarters
- Amplify existing positives across different quarters
- Develop stronger linkages between quarters
- Align Auckland City actions with users' perspectives
- Take care of low performance aspects
- Assume a leadership role in high potential areas
- Development of outside walking quarters for recreation and shopping
- Establish a presence for minority groups with a critical mass of activity
- Reflect diversity of CBD stakeholders, in non-conflicting ways



# Project team

## New River Ltd. Project Managers

**Project Manager, Roger Parker**

**Project Consultant , Rick Starr**

## Independent Experts

**Strategic Management Expert, Professor Wayne Cartwright**

**Social and Cultural Expert, Dr. Karen Fernandez**

## Field company

**Data Collection, Digipoll Ltd.**

# Project team



## **Roger Parker, C.A., MCom First Class Honours (Auckland)**

Seven years senior management experience, including management at direct report level to the head of BankDirect. Developed research methodologies that have been part of award winning research here in NZ, and that have also featured in a special issue of Marketing News published internationally by the American Marketing Association. Roger has designed, and runs, NZ's first executive course on commercializing innovation, with The University of Auckland. He is also a founding principal of New River Ltd., a successful research and consulting practice, conducting projects for large clients in New Zealand, Australia, and Singapore.



## **Professor Wayne Cartwright**

Professor of Strategic Management at the University of Auckland, with particular interests in processes of strategy formation and implementation, international strategy, collaborative approaches to strategy, the issues that global sustainability bring to business and strategic management, and the interface between corporate governance and strategic management. He has been a director of several companies, including Forestry Corporation of New Zealand, Direct Capital Partners Ltd., Nobilo Vintners Ltd., and Dairy Research Institute Ltd. Wayne is currently chairman of Enigma Publishing Ltd., and advises several companies and CRIs on a consultancy basis. He was co-leader of the Auckland City CBD study undertaken in 1996/97, and led a research stage of the Competitive Auckland initiative in 2001.



## **Karen Fernandez BCom (Melbourne), MBA (Pittsburg State), PhD (Kansas)**

Marketing doctorate emphasized consumer research methods and social psychology. Eight years experience teaching and consulting in the USA, Australia and Malaysia. Seven years teaching Consumer Research in New Zealand. Senior lecturer in the Department of Marketing at the University of Auckland. Published research in leading international journals. Karen is also engaged in consumer research projects with prominent international consumer research academics. Her current relevant research uses visual anthropology to look at the meaning of places and spaces; and cross-cultural relationships in New Zealand.



## **Rick Starr, BA (Rochester), MBA (Columbia), doctoral studies (North Carolina)**

Ten years management experience in the US, incl. brand management for Procter & Gamble and Johnson Wax. Senior lecturer in the Department of Marketing at The University of Auckland, involved now mainly in Executive Programs teaching marketing strategy, branding, customer behaviour, and marketing research. Rick is a regular presenter at the New Zealand Institute of Management Development Programme in Queenstown. He is also a founding principal of New River Ltd., a successful research and consulting practice, conducting projects for large clients in New Zealand, Australia, and Singapore.