

# Nelson City Centre Survey 2019



## Executive summary

Over the last Nelson City Council election term, Councillors requested data that would assist them in making decisions around car parking, public transport, active transport and City Centre investment.

In order to gather data for this purpose a survey of 400 Nelson residents and 100 Richmond residents was commissioned. Those surveyed answered questions regarding their choices and experiences of the Nelson City Centre and Richmond Town Centre.

The 2019 Nelson City Centre survey revealed the following trends:



Residents of both Nelson and Richmond are highly influenced by their proximity to a centre when choosing which to visit. For example, Stoke residents are more likely to choose to visit Richmond than those living in Nelson North, Nelson Central or Tanhunanui.



Residents of all areas are unlikely to visit either centre more than a couple of times a week if their place of employment is not there.



The mix of products or stores available is the factor that most attracts residents to Nelson City Centre other than for residents of the Nelson Central area who are more likely to be attracted by their proximity.



The hospitality offering of Nelson City Centre (Restaurants, cafes and cinema) is the second most attractive factor.



The character and feel of Nelson City Centre sits in fifth place with around a third of Nelson residents listing it as a factor in attracting them to visit.

What attracts people to Nelson City Centre		
Rank	Nelson Residents	Richmond Residents
1	Product/store mix available in Nelson City Centre	Product/store mix available in Nelson City Centre
2	Entertainment/restaurants/ cafes	Entertainment/restaurants/ cafes
3	The Market	The Market
4	Walkable/live close by	Work in Nelson
5	The feel/character of the Nelson City Centre	Doctor/Dentist/banking/ other professional services



The factors that attract residents to Richmond Town Centre rank in a similar order to those for Nelson City Centre but with the addition of the Richmond Mall in second place, parking in third and hospitality offer ranked lower.

What attracts people to Richmond Town Centre		
Rank	Nelson Residents	Richmond Residents
1	Prefer product/store mix available in Richmond	Prefer product/store mix available in Richmond
2	Has a covered mall	Convenient/live close by
3	The parking	Has a covered mall
4	Like the feel/character of the Richmond CBD	The parking
5	Work in Richmond or was on way to another location	Restaurants/entertainment/ cafe



Of those residents that identified car parking as a factor that attracts them to Nelson City Centre, the first hour free parking and the supply of parking were ranked first and second. Tahunanui residents were less likely than others to identify the supply of parking in the Nelson City Centre as a factor attracting them.



When asked “What changes would encourage you to visit more often?” around a third of Nelson residents stated that they are happy with the City Centre the way it is. 20%-38% identified improved parking.

## 1. Introduction

Over the last Nelson City Council election term, Councillors requested data that would assist them in their decision making around car parking, public transport, active transport and City Centre investment. A phone survey was identified as the most appropriate method of collecting the necessary data with this work undertaken during November and December 2019.

During the survey 400 Nelson residents and 100 Richmond residents answered questions regarding their choices and experiences of the Nelson City Centre and Richmond Town Centre.

The purpose of the survey was to gather data to try and understand what drives residents' decision making when they chose where to shop and spend time in the respective centres.

The number of residents surveyed was chosen as a representative sample of the resident population and split proportionally between Nelson North, Nelson Central, Stoke and Tahunanui. The split by area was intended to assist in testing preferences based on proximity to each of the centres. It is worth noting that in order to simplify the provision of privacy for survey participants, their addresses were not used or gathered at any point. Instead, residents were asked to identify which of the four main areas they lived in or closest to.

The questions in the survey included the following:

- Have you visited the Nelson city centre in the last six months?
- In the last six months have you visited the Richmond town centre?
- What proportion of your town visits were to the Nelson city centre rather than the Richmond town centre?
- In general how often do you visit the Nelson city centre?
- What factors attract you to visit Nelson city centre?
- How often do you visit Richmond town centre?
- What factors influence your decision to visit the Richmond town centre rather than the Nelson city centre?
- What is it about the parking that attracts you to the Nelson city centre?
- What is it about the parking that attracts you to the Richmond town centre?
- What changes would encourage you to spend more time or travel more often to the Nelson city centre?

The responses to the survey questions have been combined with the location and demographic data of respondents to build up a picture of how all of these factors influence how many people visit the Nelson City Centre.

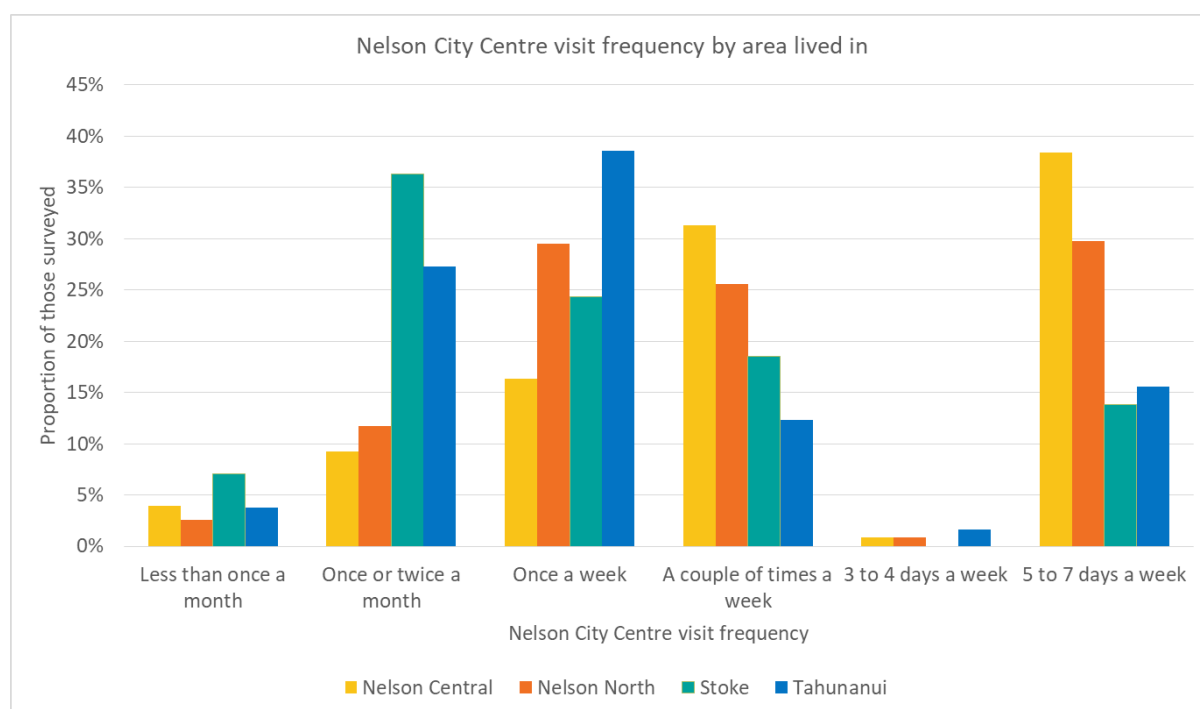
## 2. Results

The results of the survey have been analysed and are summarised in the sections below.

### 2.1 Proximity and Frequency

The early survey questions were designed to determine how much proximity, between where residents live and both of the main retail centres, influences which centre a resident will chose to visit. Factors that influence residents' choices other than proximity are summarised later in this report.

**Figure 1** below shows the frequency that residents of Nelson visit Nelson City Centre split down by the broad areas identified in the survey questions.



**Figure 1: Nelson City Centre visit frequency by area lived in.**

**Figure 1** shows that, Nelson residents that live closer to the Nelson City Centre in Nelson Central or Nelson North generally travel to the City Centre more often than Nelson residents that live further away in Stoke and Tahunanui.

For Nelson residents it is clear that proximity influences the decision of which centre to visit.

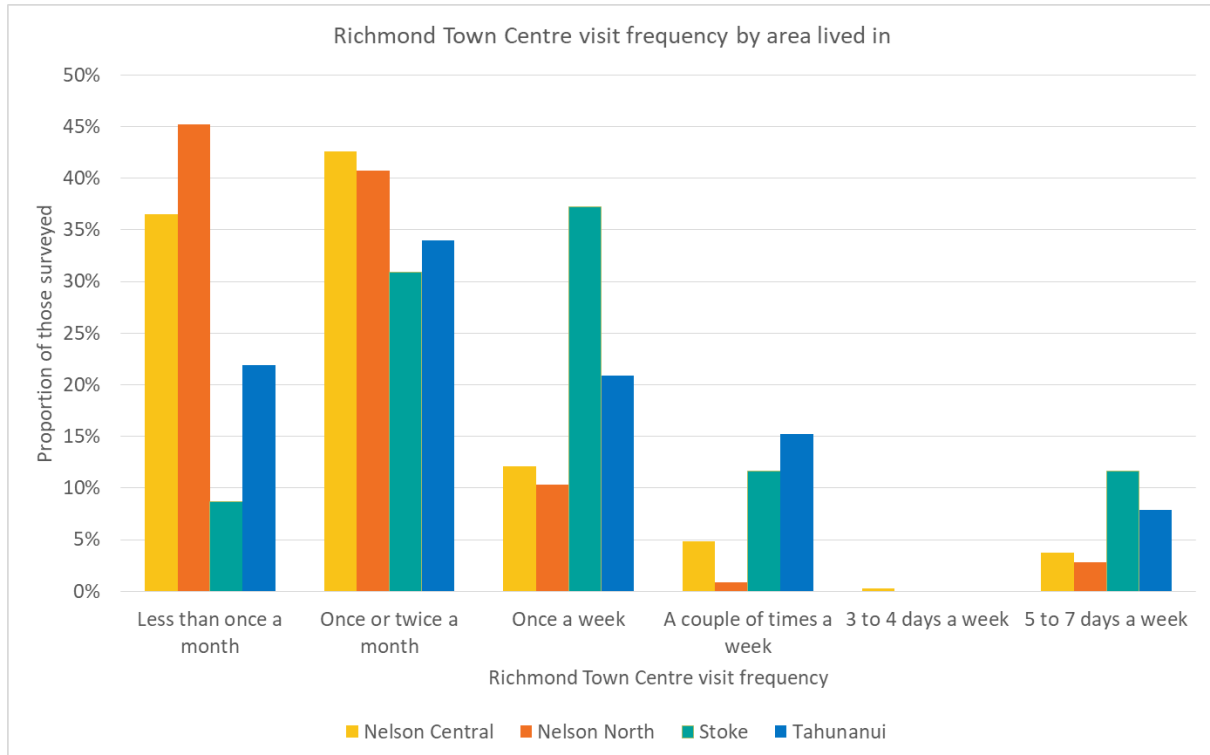
Of interest is the very small proportion that visit the Nelson city centre 3 to 4 days a week but the proportion then increasing again for 5 to 7 days a week. The 5 to 7 times a week visitors represent those residents that travel to the city centre for work or study.

The trend shown in Figure 1 indicates that unless residents work in the city centre they are unlikely to visit more than a couple of times a week.

When the data is broken down by age group, 16-44 year olds visit the Nelson City Centre most often followed by 45-64 years old and finally 65+ year olds visiting least often. A clear limitation of the survey was the inability to interview children younger than

16, especially given the observations during the Public Life Survey in 2019/20 identifying them as a group that does not visit the Nelson City Centre often.

**Figure 2** below shows the frequency that residents of Nelson visit Richmond Town Centre split down by area.



**Figure 2: Richmond Town Centre visit frequency by area lived in.**

**Figure 2** shows that, again as expected, those that live in the areas closer to Richmond generally visit Richmond Town Centre more often than those that live in the main Nelson Central and Nelson North areas. The results of this survey question are essentially the inverse of the previous question that asked how often residents visited Nelson city centre and are summarised below:

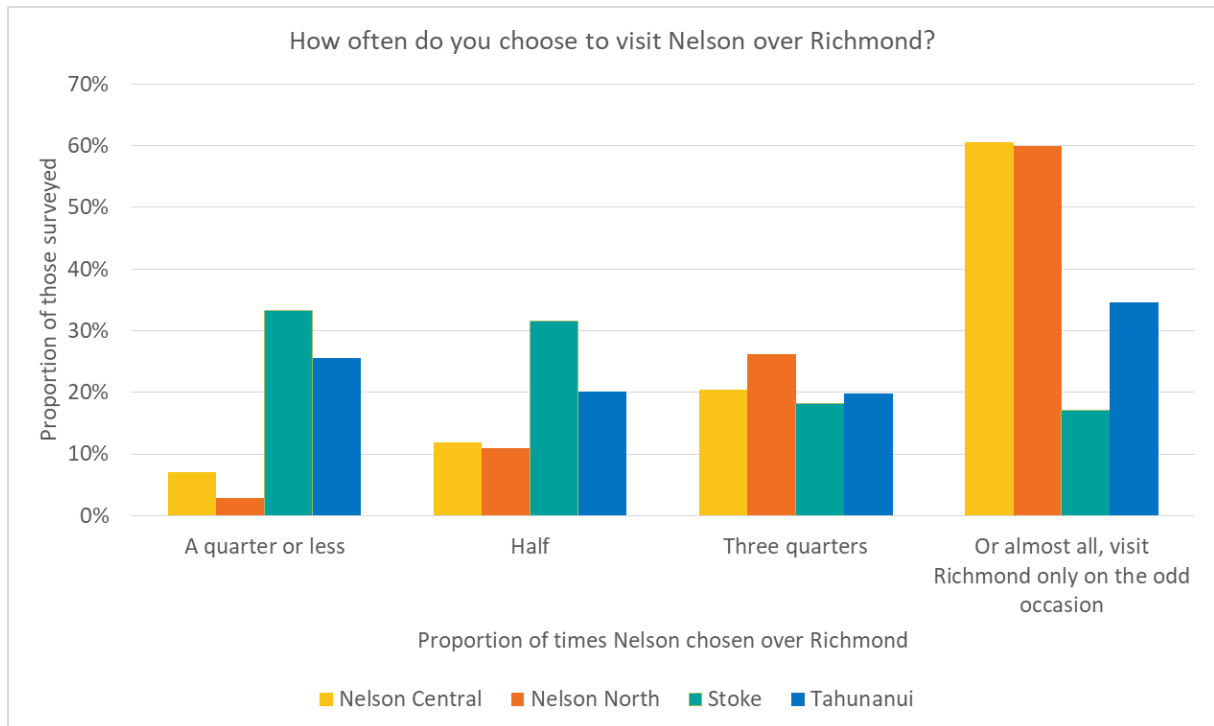
Overall, Nelson residents visit Nelson city centre far more often than they visit Richmond town centre with the majority of residents visiting Richmond once or twice a month or less. Residents that live in the Nelson North area in particular visit Richmond very rarely.

The proportion of Nelson residents working in Richmond is also much lower than those working in the Nelson city centre.

When the data for visits to Richmond Town Centre is broken down by age, the trend is that the 65+ age group visit more often than the other age groups. It has been suggested in the past that this is likely to be to do with older residents preferring the Richmond Mall but the responses to the factors identified in Table 2 later in this report show that those in the 65+ age bracket list the Richmond Mall at a similar rate to the 45-64 year olds and a much lower rate than the 16-44 year olds. Instead, the supply of parking and the character of Richmond Town Centre are the factors that attract the 65+ age group over and above the attractiveness of the mall to the two other age groups.

## 2.2 Choosing Nelson or Richmond

**Figure 3** below shows proportion of time that Nelson residents choose to visit Nelson instead of Richmond when they have a choice (for example not for work, family obligations and the like).



**Figure 3: Proportion of time that Nelson residents choose to visit Nelson instead of Richmond**

**Figure 3** again shows the expected result with residents of Stoke and Tahunanui less likely to choose Nelson City Centre than Nelson Central and Nelson North residents on occasions that they have a choice of which centre to visit.

All three of the graphs above illustrate that the behaviour of Nelson residents in choosing which centre to visit make their choice at least in part to reflect the proximity of the centre to their place of residence.

So what else drives the choice of centre? The following part of the report looks at proximity along with other factors identified by residents as influencing their decision making when choosing a centre to visit.

## 2.3 Why Nelson?

**Table 1** below shows the top ten factors that attract residents to Nelson City Centre. Note that respondents were asked to choose all of the factors that applied to them so the totals will add up to greater than 100%. The cells have been colour coded from high/green to low/red to allow easier identification of trends and outliers.

Q5 - What factors attract you to visit Nelson city centre?	Total for all areas	Where I live		Where in Nelson I live			
		Nelson	Richmond	Nelson Central	Nelson North	Stoke	Tahunanui
		Product/store mix available in Nelson City Centre	69%	69%	69%	71%	76%
Entertainment/restaurants/cafes	62%	65%	54%	69%	68%	53%	58%
The Market	50%	56%	30%	62%	48%	40%	61%
Walkable/live close by	42%	55%	0%	80%	45%	19%	20%
The feel/character of the Nelson City Centre	34%	41%	11%	49%	40%	27%	34%
Parking	29%	35%	10%	39%	31%	32%	26%
Work in Nelson	28%	31%	18%	36%	35%	23%	19%
Doctor/Dentist/banking/other professional services	7%	5%	15%	6%	2%	3%	8%
Meetings/Hobbies/Church/Volunteer work	2%	3%	2%	2%	3%	1%	6%
Walkable/pedestrian friendly/ use cycle ways	2%	3%	1%	3%	4%	3%	0%

**Table 1: Factors attracting residents to Nelson City Centre**

**Table 1** shows that overall, the mix of stores and products available was identified as the greatest attraction although this was lower for Stoke and Tahunanui residents. Proximity (Walkable/live close by) was identified by Nelson Central residents as the greatest attractor.

Also of interest are the following points:

- Parking ranked sixth overall with between 27% and 49% of Nelson residents identifying it as a factor that attracts them to the Nelson City Centre.
- The Saturday Market attracts a significant proportion (30%) of Richmond residents to visit Nelson City Centre.



**Figure 4** below illustrates the factors that attract Nelson residents, split by the area they live in, to the Nelson city centre in the more visual form of a word cloud. The size of the words reflect the number of times they were used when surveyed residents detailed their preferences.



**Figure 4: Factors that attract residents living in Nelson Central, Nelson North, Stoke and Tahunanui to the Nelson City Centre.**

So in summary, the mix of shops, hospitality offering, Saturday market, parking and character are the common factors that attract Nelson residents to visit Nelson City Centre.

## 2.4 Why Richmond?

**Table 2** below shows the top ten factors that attract residents to Richmond Town. Note that respondents were asked to choose all of the factors that applied to them.

Q7 - What factors influence your decision to visit the Richmond town centre rather than the Nelson city centre?	Total for all areas	Where I live		Where in Nelson I live			
		Nelson	Richmond	Nelson Central	Nelson North	Stoke	Tahunanui
Prefer product/store mix available in Richmond	66%	68%	61%	65%	59%	81%	73%
Has a covered mall	46%	47%	43%	49%	42%	51%	39%
The parking	38%	41%	30%	36%	36%	57%	43%
Like the feel/character of the Richmond CBD	23%	27%	14%	23%	14%	35%	42%
Convenient/live close by	17%	1%	59%	0%	1%	1%	1%
Restaurants/entertainment/cafe	14%	13%	16%	8%	10%	24%	14%
Work in Richmond or was on way to another location	13%	13%	11%	11%	28%	10%	11%
Visiting friends/family	7%	9%	3%	9%	3%	10%	13%
Appointments/banking/business reasons	4%	4%	4%	5%	0%	5%	4%
Nice to go for a change/for a drive/take family	2%	3%	0%	5%	0%	0%	3%

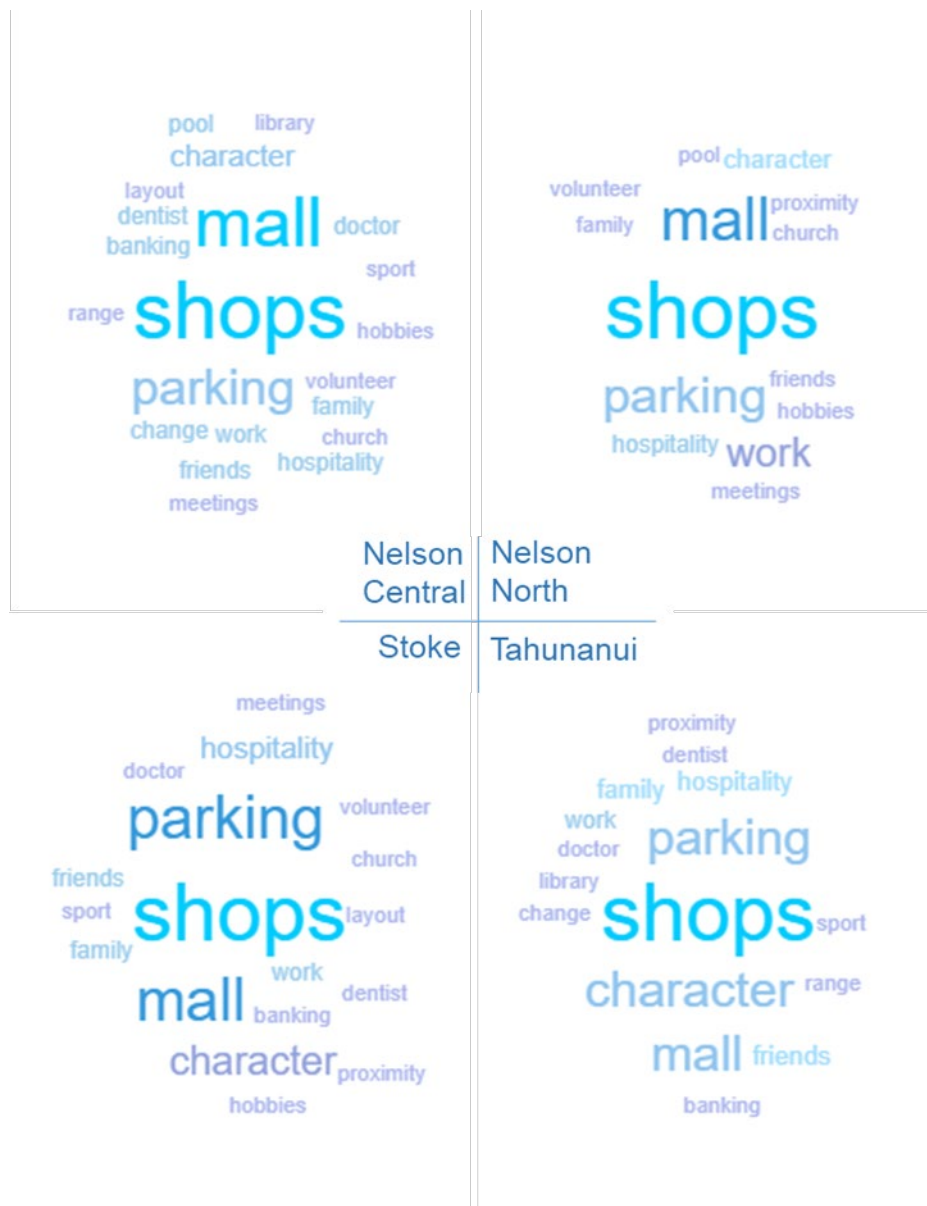
**Table 2: Factors attracting residents to Richmond Town Centre**

**Table 2** shows that again, overall the mix of stores and products available was identified as the greatest attraction of Richmond with a definite preference from Stoke and Tahunanui residents. The presence of the Richmond Mall and the parking provisions in Richmond Town Centre rank second and third on the list.

Also of interest are the following points:

- Nelson North residents are over-represented in that they are more likely to work in Richmond than residents from other areas even though they live the furthest from Richmond town centre.
- Richmond residents value proximity to the closest centre when choosing where to visit.
- Richmond residents are less likely than Nelson residents to be attracted by the character of Richmond Town Centre when choosing where to visit.
- Factors such as parking, the mix of shops and the mall are more important to Richmond residents than the current character of Richmond Town centre when choosing where to visit.

**Figure 5** below illustrates the factors that attract Nelson residents, split by the area they live in, to the Richmond town centre in the more visual form of a word cloud. The size of the words reflect the number of times they were used when surveyed residents detailed their preferences.



**Figure 5: Factors that attract residents living in Nelson Central, Nelson North, Stoke and Tahunanui to the Richmond Town Centre**

So in summary, the mix of shops, mall, and parking are the most popular factors that attract Nelson residents to visit Richmond Town Centre.

## 2.5 Parking

**Table 3** below shows the factors that residents identified as making the parking in Nelson City Centre attractive if they identified parking in question 5. Note that respondents were asked to choose all of the factors that applied to them.

Q8a - What is it about the parking that attracts you to the Nelson city centre?	Total for all areas	Where I live		Where in Nelson I live			
		Nelson	Richmond	Nelson Central	Nelson North	Stoke	Tahunanui
Free first hour	62%	60%	84%	66%	54%	43%	64%
Parking is easy/ample/plenty of parking	35%	36%	29%	30%	55%	54%	20%
Convenient/close to shops	9%	9%	11%	9%	10%	10%	10%
Certain times/places better than others	5%	5%	5%	3%	3%	0%	25%
Shops have parking	3%	3%	0%	3%	0%	8%	0%
Disability parks/mobility stickers	1%	1%	0%	0%	3%	2%	3%
Like layout/size	0%	0%	0%	0%	0%	0%	3%
Other	9%	10%	0%	12%	3%	9%	11%
Nothing/Don't know	3%	3%	0%	5%	0%	2%	0%

**Table 3: What works for parking in Nelson?**

**Table 3** shows that the first hour free scheme is very popular across all areas. On average, around one third of those surveyed stated that they thought the availability of parking in Nelson is ample and easy to use. Residents of Nelson North and Stoke found the parking to be most ample of all the areas.

## 2.6 The wish list

**Table 4** summarises the responses when survey subjects were asked what changes could be made to the Nelson City Centre to encourage them to visit more often.

Q9 - What changes would encourage you to spend more time or travel more often to the Nelson city centre?	Total for all areas	Where I live		Where in Nelson I live			
		Nelson	Richmond	Nelson Central	Nelson North	Stoke	Tahunanui
Nothing/happy the way it is	37%	34%	46%	35%	40%	33%	27%
Better parking/more disability parking/issues around parking	21%	25%	9%	24%	20%	20%	38%
Specific shops/restaurants (excluding mall)	16%	16%	15%	17%	9%	24%	12%
Empty shops/improve feel/atmosphere of city/green spaces	11%	11%	8%	13%	11%	14%	3%
Make it pedestrian friendly/like Trafalgar Street being closed off/more seats	9%	10%	6%	13%	10%	9%	5%
More entertainment/events/more entertainment facilities	8%	8%	6%	10%	8%	7%	5%

**Table 4: Factors that would encourage more visits.**

**Table 4** shows that the most popular factor overall (34% for Nelson residents) to the question of what improvements are needed was that nothing needed to be done as they were happy with Nelson City Centre how it currently is. This was followed by better or more parking which would indicate that while around a third of residents are happy with parking, a quarter are not. Tahunanui residents (38%) were more likely to want more or better parking provided in Nelson City Centre than residents from other areas.

Given the recent closure of Upper Trafalgar Street to motor vehicles, and the closures popularity, it is not surprising that around 10% of Nelson residents surveyed identified further street closures or making streets more pedestrian friendly as something that would attract them to visit more often.

**Table 5** looks at the same responses as in table 4 but splits the responses down by gender and age group.

Q9 - What changes would encourage you to spend more time or travel more often to the Nelson city centre?	Gender		Age Group		
	Male	Female	16 to 44	45 to 64	65+
Nothing/happy the way it is	43%	32%	33%	32%	50%
Better parking/more disability parking/issues around parking	22%	20%	21%	24%	15%
Specific shops/restaurants (excluding mall)	13%	18%	19%	16%	12%
Empty shops/improve feel/atmosphere of city/green spaces	6%	15%	9%	13%	9%
Make it pedestrian friendly/like Trafalgar Street being closed off/more seats	8%	10%	10%	10%	7%
More entertainment/events/more entertainment facilities	9%	7%	8%	10%	4%

**Table 5: Factors that would encourage more visits by gender and age.**

**Table 5** shows that levels of satisfaction with the Nelson City Centre as it is currently are relatively high.

The highlights of the responses are:

- The oldest age group of 65+ (50%) are the most satisfied with the Nelson City Centre as it currently is.
- Males are more likely to be satisfied with the Nelson City Centre as it currently is although it is worth noting that males are slightly less likely to visit the Nelson City Centre for activities other than work.
- Females are more likely to want to see improvements in the character of the Nelson City Centre even though almost equal numbers of males and females list the character as what attracts them to the City Centre in the first place.

### 3. Conclusion

This document provides a short overview of the results of the 2019 Nelson City Centre user survey. The results showed the following trends:



Residents of both Nelson and Richmond are highly influenced by their proximity to a centre when choosing which to visit. For example, Stoke residents are more likely to choose to visit Richmond than those living in Nelson North, Nelson Central or Tahunanui.



Residents of all areas are unlikely to visit either centre more than a couple of times a week if their place of employment is not there.



The mix of products or stores available is the factor that most attracts residents to Nelson City Centre other than for residents of the Nelson Central area who are more likely to be attracted by their proximity.



The hospitality offering of Nelson City Centre (Restaurants, cafes and cinema) is the second most attractive factor.



The character and feel of Nelson City Centre sits in fifth place with around a third of Nelson residents listing it as a factor in attracting them to visit.



The factors that attract residents to Richmond Town Centre rank in a similar order to those for Nelson City Centre but with the addition of the Richmond Mall in second place, parking in third and hospitality offer ranked lower.



Of those residents that identified car parking as a factor that attracts them to Nelson City Centre, the first hour free parking and the supply of parking were ranked first and second. Tahunanui residents were less likely than others to identify the supply of parking in the Nelson City Centre as a factor attracting them.



When asked "What changes would encourage you to visit more often?" around a third of Nelson residents stated that they are happy with the City Centre the way it is. 20%-38% identified improved parking.