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Palmerston North City Centre Travel and Parking Behaviour Study

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FINAL

Summary Report

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Contents

Disclaimers and Limitations

This report ('**Report**') has been prepared by WSP exclusively for Palmerston North City Council ('**Client**') in relation to the development of a Palmerston North Customer and Retailer Survey ('**Purpose**') and in accordance with the Offer of Service (dated 28th January 2022) and accompanying Short Form Agreement (dated 28th January 2022). The findings in this Report are based on and are subject to the assumptions specified in the Report. WSP accepts no liability whatsoever for any reliance on or use of this Report, in whole or in part, for any use or purpose other than the Purpose or any use or reliance on the Report by any third party.

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1 Introduction

Palmerston North is undergoing transformational changes in the form and function of the city centre and wider urban area, with population growth and major public and private investment stimulating the local economy and spearheading the city's transition from a regional town to a small city. This shift is bringing about major changes to how Palmerston North's transport system is managed, planned and delivered, and is leading to the need to accommodate a more diverse modal mix and cater for a larger range of user requirements across a variety of places within the city.

Palmerston North City Council (PNCC) is developing a number of plans and strategies to guide future decision-making and capital investment within the city centre; defined as the area bounded by the Inner Ring Road (Princess St, Ferguson St, Pitt/Bourke St & Grey/Walding St). This has brought on the need for PNCC to better understand how customers travel to and within Palmerston North's city centre and the transport parameters that may influence shopping behaviour and economic activity within it. Developing a greater understanding of these parameters is key to informing future plans and strategies that seek to achieve a greater level of economic activity in the city centre, with invaluable benefits to the local business community and key partners.

WSP were engaged by PNCC to develop a city centre "customer" and "retailer" survey. The former sought to develop a better understanding of how potential customers engage with the city centre and identify differences in shopping behaviour based on the dominant mode of transport used. The latter sought to better understand retailer perceptions around the transport choices of their customers and enabled a comparative analysis of retailers' perception of customer travel behaviours with the actual travel behaviours stated by the customers surveyed.

This summary report presents findings of the Palmerston North city centre shoppers survey conducted for PNCC by WSP.

2 Survey Approach

For the purpose of understanding where people are visiting, the city centre was divided into six zones (A, B, C, D, E and The Plaza shopping centre). These zones represent the bulk of the Palmerton North city centre retail area[1]. **Appendix A** shows the geographic extent of the zones and provides a description of the key characteristics of each zone.

During data collection surveyors approached both customers and retailers[2] in Zones A, B, C, D and E. Surveyors approached potential participants (both, customers, and retailers) and the participants were self-selecting. Surveys were not undertaken inside The Plaza itself; however, it was included as a separate zone as it was recognised people may park at The Plaza and travel to other zones in the city centre or vice versa.

The surveys were undertaken over a period of three weekends from March 4th to March 20th 2022 during likely peak trading hours across locations within the city centre (see Table 1-1). The surveys were undertaken by the PNCC City Ambassadors, using iPads and the SurveyMonkey Anywhere app. In total, **312 customer** and **117 business** survey responses were captured.

Table 2-1: Agreed times for data collection.

DAY OF THE WEEK	TIME
Fridays	From 11:30am to 1.30pm, and from 6pm to 8pm
Saturdays	From 11 am to 3 pm
Sundays	From 11 am to 3 pm

[1] This largely aligns with the "inner business zone" identified within the PNCC District Plan zoning maps

[2] For the purpose of this study, both business owners and managers were considered as retailers.

While the surveys were designed to capture responses from as many participants as possible, there are a number of survey limitations that need to be considered (see **Appendix B**). A copy of the customer and retailer survey questionnaires are included in **Appendix C**. A summary of the key findings from the surveys are outlined in Section 3, with the technical report provided in **Appendix D**.

3 Survey Findings

The insights presented in this section were developed through the cross-tabulation of the survey results, and highlights relationships across various parameters including mode of travel, spend and duration of visit among others. Key insights are featured in text boxes below with supporting data from the surveys also provided.

Around a quarter of customers visiting Palmerston North's city centre choose to travel by foot, on a bike, e-scooter or a bus

Around three quarters of customers travelled to the city centre by private vehicle, which echoed sentiments by city centre retailers around how their customers access the city. Around 18% of customers surveyed chose to use active modes – i.e. walking, cycling or micro-mobility – and 6% used public transport.

The use of active modes and public transport was shown to decrease with greater travel distances, indicating a greater reliance on private vehicles for those travelling from outside of Palmerston North. This is reflective of limited alternative transport options (such as public transport) connecting the city centre with trip origins beyond the city such as Ashhurst, Bunnythorpe and Feilding. The low reported public transport use by those travelling from within Palmerston North may suggest services are less frequent and potentially less convenient than a private vehicle for people travelling during evenings and weekends.

Palmerston North's city centre is the primary or final destination of the trip for almost all customers in the city centre, reflecting its function as a key local and regional hub for retail, hospitality and other services

Only 4% of customers indicated they were stopping on their way through to a different location outside of the city centre, indicating that the city centre is the primary or final destination for most visitors. Nearly half of all customers expressed the intention to visit either restaurants, bars, cafes or retail stores in the city centre, with other trip attractors including visiting for work, school/study and basic services (e.g. bank, gym, hairdresser, medical services, and the library).

Customers coming from within Palmerston North were three times more likely to be frequent visitors[3] than those coming from outside the city.

Just over two-thirds (68%) of customers travelled to the city centre from within Palmerston North, with the remaining customers travelling from outside of the city. Although people travelling from outside of Palmerston North spent an average of $215 per visit – $137 more than those living in Palmerston North – they visit less frequently, with three times as many frequent visitors travelling from within Palmerston North. Customers visiting from outside of Palmerston North are likely to be bulk buying or coming for a social or recreational reasons, and therefore spending more per trip but visiting the city centre less frequently than those living within Palmerston North.

Trip purpose differed by trip origin with those travelling from outside Palmerston North more likely to visit retail, restaurants, cafes, and bars, reflecting the city's role as a regional shopping and hospitality hub. Customers travelling from within Palmerston North were more likely to be accessing the city centre for work, education and key services in comparison to those from outside of

[3] A frequent visitor is defined as a person who visits the city centre three or more days a week.

Palmerston North, demonstrating the importance of the city centre's diverse function for retail and hospitality but also as a critical hub for a mix of everyday services and activities.

Customers who travel by bus or active modes spend less money per trip but are almost twice as likely to be frequent visitors, spend more time (+14%) and visit more parts of the city centre than those who travel by private vehicles.

While active modes and public transport users spent an average of $84.80 per visit at businesses in the Palmerston North City Centre – $19.70 less than the average spend per trip for private vehicle users – they visit the city centre more frequently (53% stated they visit three or more days a week, compared with 31% travelling by car), stay longer (2 hours 39 minutes compared with 2 hours and 20 minutes for those travelling by car) and tend to visit more areas of the city centre per visit (2.1 zones compared with 1.7 zones by car). The findings suggest there may be wider economic opportunities that currently remain untapped. These could be realised by better catering for customers travelling to the city centre by active modes or public transport.

Despite Palmerston North's city centre encompassing an area within a generally walkable catchment of 400m – approximately a 5-minute walk – nearly half of customers making trips both starting and ending within the city centre reportedly chose to travel by private vehicle, suggesting that either significant barriers exist to walking between destinations within the city centre, or the use of a private vehicle to undertake short trips is considered the easiest option.

Customers parking in off-street carparks intend to spend more time (+14%) and more money (+46%) in the city centre than customers parking on-street

Just over three-quarters (77%) of surveyed customers that drove to the city centre opted to park in on-street carparks. The results showed that off-street carparking was used at higher rates when short stays were not charged. For example, 40% of customers that parked in Zone A utilised off-street parking in King Street/Queen Street where the first hour of parking in the council off-street carpark is free, although UCOL student parking and leased parking is also available.

Compared with their on-street parking counterparts, customers who parked in off-street parking areas expected to spend more time (2 hrs and 31 mins compared with 2 hrs and 12 mins) and more money (approximately $144.30 compared with $98.90) in the city centre.

Customers noted the cost of parking had minimal influence on parking choice, with only 18% of customers indicating this as a contributing factor in their choices compared to others such as convenience and the availability of a carpark. Convenience was identified as the primary factor influencing parking decisions for customers using on-street carparks, with 52% of customers indicating this as the reason for their parking choice compared with 42% of customers who had used off-street carparking.

Retailers tended to underestimate their customers' persistence in finding a carpark, and also overestimated the likelihood and proportion of customers who would abandon their trip to the city centre altogether if a desired carpark wasn't available.

When customers were asked about the decisions they might make if they were unable to find a desired (i.e. appropriate level of convenience, parking fee etc.) carpark, 85% indicated they would continue to persist in looking for a carpark – 30% higher than what retailers indicated. Similarly, only 3% of customers told us they would abandon their journey altogether if they could not find a carpark – 17% lower than what retailers indicated. This indicates that retailers underestimate customers persistence in continuing to look for a carpark if a desired one cannot immediately be found.

A contributor to this persistence is likely the lack of alternate retail and hospitality hubs across the wider region that offer a comparatively diverse offering. None of the surveyed customers indicated they would travel to a different shopping centre outside of the Palmerston North city centre if they couldn't find a parking space where they intended to park, while only 8% indicated they would travel to a different shopping area within the city centre. This supports the role of the city centre as a regional shopping centre, particularly those travelling from within Palmerston North who have limited shopping alternatives.

Retailers tended to overestimate the proportion of their customers parking in close proximity to their business, whilst customers indicated they are willing to travel to a range of destinations within city centre that aren't immediately nearby to the location they choose to park in.

Surveyed customers parking on Broadway Avenue (Zone B) and Cuba Street/George Street (Zone D) recorded a high proportion of intra-zonal trips[4] compared to customers parking within the other city centre zones. Meanwhile, customers parking vehicles within the King Street/Queen Street (Zone A), Main Street/Church Street (Zone C) and Te Marae o Hine (The Square) (Zone E) visited more widely than their parked zone, with key destinations being The Plaza and the Broadway shopping area (see Figure 3-1).

Retailers estimated that around 80% of their customers parked within the same zone in which their respective business was located. Customer survey data indicated that the true proportion ranged between 25% to 67% (mean of 46%) depending on the zone, indicating retailers over-estimate the proportion of customers parking in the same zone as their business. This suggests that customers are more willing to travel between where they have parked and their intended shopping destination than initially expected.

Customers travelling by active modes or public transport were nearly twice as likely to visit both sides of the city centre than those travelling by car

Customers that opted to travel into the Palmerston North city centre in private vehicles were less inclined to travel between zones on either side of Te Marae o Hine (The Square). Almost a quarter (22%) of customers who travelled to the city centre by active modes or by bus intended to visit zones on both sides of Te Marae o Hine (The Square) compared with only 12% of all customers travelling by private vehicle. This was also confirmed through the parking data which shows only 15% of customers in private vehicles who intended to visit the western side of Te Marae o Hine (i.e. Cuba Street and George Street) had parked in zones located on the eastern side of the city centre.

Pedestrian connectivity between The Plaza and the Broadway shopping area is important for people that visit the city centre. Almost a quarter of all customers surveyed intended to visit both The Plaza and Square East / Broadway precincts during their trip.

Almost 40% of customers within the city centre expressed the intent to visit The Plaza, with only a quarter of these customers expecting to visit The Plaza as a sole destination on their trip. Nearly two thirds (63%) of all customers who intended to visit The Plaza also intended to visit Zone A (Queen Street/King Street), Zone B (Broadway shopping area) or Zone C (Main Street/Church Street). Of customers visiting the Plaza who had parked within the city centre, half (50%) had parked on Te Marae o Hine (The Square) or the Broadway shopping area. This indicates a high level of customer activity between the eastern zones of the city centre and the Plaza.

This finding highlights the importance of providing high levels of access and connectivity for customers travelling between zones on key desire paths such as Square East or the numerous inner-city laneways between Church Street and Broadway.

Two thirds of surveyed customers would visit the city centre more frequently if there were better transport options and/or improved public spaces.

The notion of improvements to create more space within the city centre for people to enjoy and more options to easily travel around were largely supported by customers, indicating they would

[4] Intra-zonal trips denote drivers who park and visit destinations within the same zone

visit the city centre more or as frequently as they do at present (58% and 41% respectively). Under 1% of surveyed customers who travelled by private vehicle indicated they would visit less frequently than they do presently.

Similar sentiments were provided by retailers who estimated that 66% of customers would visit more frequently while 32% would visit about as frequently as they do at present. These outputs suggest that both customers and retailers have a high degree of optimism around improvements made to both the urban form and transport network within the city centre, and imply a high level of confidence that changes to both aspects can lead to positive economic outcomes for businesses based within Palmerston North's city centre.

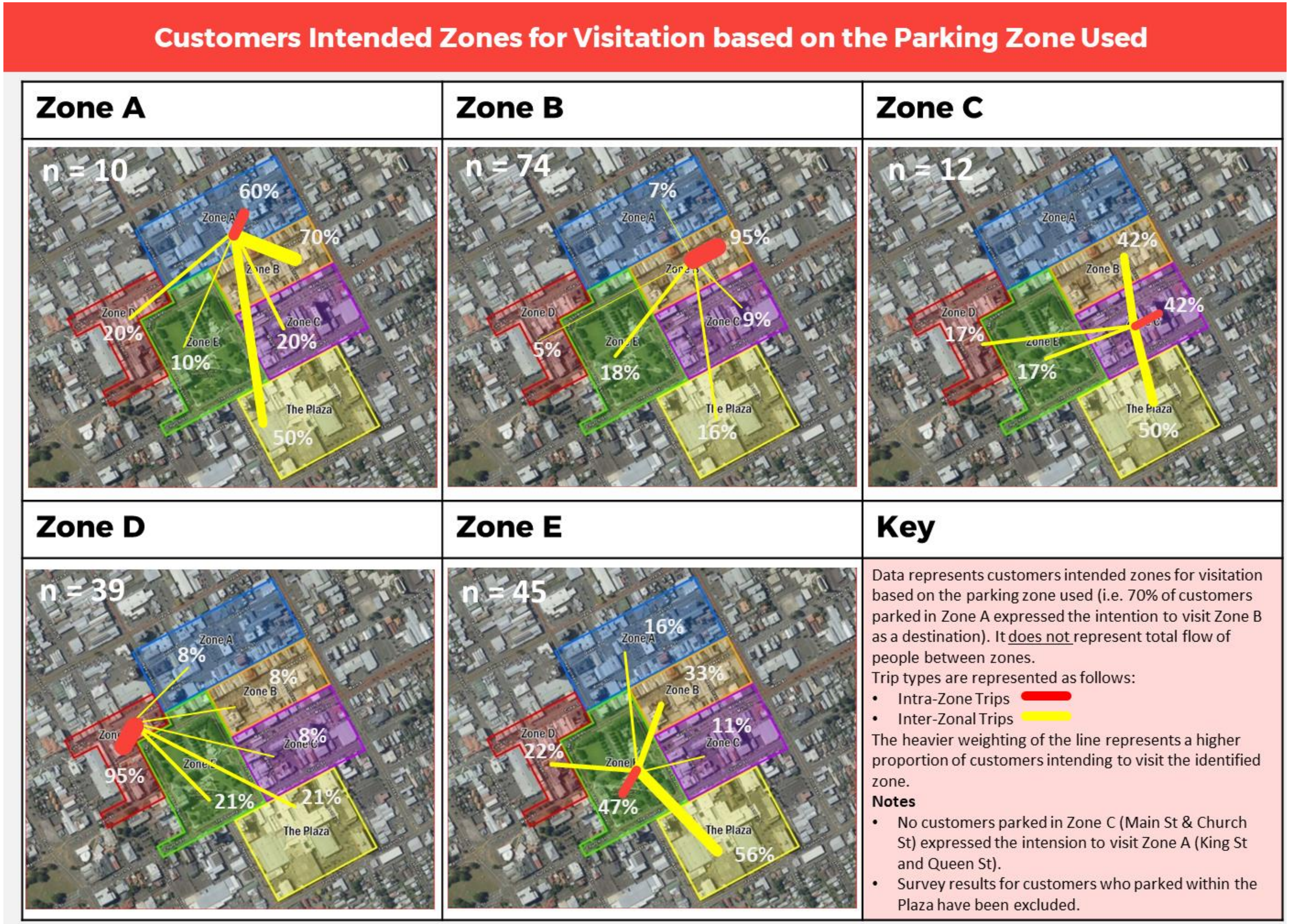


Figure 3-1: Customers Intended Zones for Visitation based on their Parking Zone Used

4 Opportunities for Further Investigation and Research

- With both customers and retailers agreeing that better travel options and an improved public realm in the city centre could lead to higher levels of visitation, further location-specific studies could identify specific parameters and/or improvements that contribute to the biggest positive impacts. Before-and-after evaluations where placemaking, road space re-allocation or active transport projects have been undertaken (such as Square East) would provide empirical evidence of the impacts these projects are actually having on customer behaviour and spending patterns.
- Whilst the surveys were undertaken during generally agreed upon peak trading hours across a number of weeks, they were also undertaken during the 2022 COVID-19 Omicron outbreak which is likely to have significantly influenced travel behaviour and transport decisions. Repeated and regular future studies could be undertaken to understand what impact (if any) COVID and shifts to remote working at offices within/around the city centre may have had on travel and economic activity.

Appendix A – Data Collection Survey Area Maps

ZONE MAP

Note *- Customers and retailers inside The Plaza were not surveyed as this survey mainly focused on on-street car parking managed by PNCC. The Plaza was included as its own zone (shown in Figure 1 above), acknowledging that people may choose to park at the Plaza and visit another zone in the city centre.*

ZONE	DESCRIPTION
A	Predominantly commercial tenancies with an abundance of both on and off-street parking. The Universal College of Learning (UCOL) site is situated within Zone A.
B	A mixture of hospitality, smaller/boutique retail sites and entertainment venues (e.g., Regent on Broadway and Event Cinemas). Likely to see more visitors during evenings compared with other zones. Nearby off-street parking is available at Downtown Shopping Centre parking complex (access from Main Street).
C	Predominantly commercial and vacant buildings with a sparse retail and hospitality offering that are likely more car dependent. Abundance of on-street parking on Main Street East. Square East (outside The Plaza and bordering on Zone E) is vastly different with a retail typology similar to that of Zone B. Nearby off-street parking is available at Downtown Shopping Centre parking complex (access from Main Street).
D	Several daytime hospitality venues (i.e., cafes) with a selection of evening venues (i.e., cinema and bar). Highest concentration of 'boutique' stores in the city, with abundant off-street parking (Harvey Norman surface level and underground) and limited on-street parking.
E	Key public space with several 'dwelling' areas (both formal and informal). Intercity bus station is a key node for people movements, and abundant parking on perimeter of Zone.
The Plaza	Main shopping destination in Palmerston North. Abundant carparking, with many visitors likely travelling to other areas in the city centre on foot while taking advantage of the 1-hour free parking offered.

Appendix B – Survey Questionnaires

Palmerston North Parking Survey – Customer Survey

Question	Response options
Q1. Where did you travel from today?	From within the Palmerston North City Centre
	From somewhere else in Palmerston North
	From outside Palmerston North
	Not sure / don't know
Q2. How did you travel into/within the City Centre today?	Drove a private vehicle / work vehicle
	Passenger in a private vehicle / work vehicle
	Walk/jog
	Cycle/scoot
	Bus
	Taxi/Rideshare (e.g. Uber)
	Other
If 'drove a private vehicle / work vehicle' or 'passenger in a private vehicle / work vehicle' selected for Q2…	
Q3. Did your trip involve the use of carparking? If so, where did you park?	No carparking used
	On-street carpark
	Off-street carpark (e.g. parking building)
Q4. Where did you park? ***Refer to the Palmerston North City Centre Zones map below.***	Zone A
	Zone B
	Zone C
	Zone D
	Zone E
	The Plaza
	Somewhere else
	Not sure / don't know
Q5. Why did you choose that carpark? Choose all that apply.	No particular reason
	It was the first one I found
	It is conveniently located near a place in the City Centre that I am visiting
	It is in a safe location
	Cost of carpark
	Other
Q6. If you had not found that carpark, what would you have done?	Kept looking for another carpark
	Abandoned the outing entirely
	Travelled to a different shopping area within the City Centre
	Travelled to a different shopping area outside the City Centre
	Not sure / don't know

Question	Response options
	Other
Q7. What is the purpose of your outing in the City Centre today? Select all that apply.	Stopping on my way through to a different location (outside the City Centre)
	Going to restaurants/cafes/bars
	Going to retail shops
	Using services (e.g. bank, gym, hotel, hairdresser, medical centre, library)
	Going to the cinema/theatre
	Providing business services (e.g. deliveries)
	Going to work
	Going to school or study
	I live in the City Centre
	Other
Q8. Please identify which zones you will likely be visiting in the City Centre today. Select all that apply. ***Refer to the Palmerston North City Centre Zones map below.***	Zone A
	Zone B
	Zone C
	Zone D
	Zone E
	The Plaza
	Not sure / don't know
Q9. About how much time in total do you think you will spend in the City Centre on your outing today?	*Written response*
Q10. If you don't mind, about how much money in total do you think you will spend in the City Centre on your outing today?	*Written response*
Q12. How often do you typically visit the Palmerston North City Centre?	Several times a week or more (3+ days a week)
	About once or twice weekly
	About fortnightly
	Less than monthly
	About monthly
Q13. If the City Centre had more space for everyone to enjoy and more options for them to easily get around, how frequently do you think you would visit?	More frequently than I do now
	About as frequently than I do now
	Less frequently than I do now
	Not sure / don't know

Palmerston North Parking Survey – Retailer Survey

Question	Response options
Q1. Which zone is the business located in? ***Refer to the Palmerston North City Centre Zones map below.***	Zone A
	Zone B
	Zone C
	Zone D
	Zone E
	The Plaza
Q2. Thinking about where your customers travel from, what do you think is the approximate percentage that travel from…	
Within the Palmerston North City Centre?	Written response, e.g. 50%
Somewhere else in Palmerston North?	
Outside Palmerston North?	
Q3. Now, thinking about how your customer travel to your business, what do you think is the approximate percentage that travel by…	
Car / private vehicle?	*Written response, e.g. 50%*
Walk / cycle / scoot?	
Bus?	
Q4. For your customers who use a car / private vehicle to travel to your business, approximately what percentage do you think park in the same zone as your business? ***Refer to the Palmerston North City Centre Zones map below.***	*Written response, e.g. 50%*
Q5. What do you think is the most important reason your customers consider when choosing where to park?	*Written response*
Q6. If your customers who look for a carpark conveniently located near your business were unable to find a convenient carpark, what do you think the majority of them would be likely to do?	Keep looking for another carpark
	Travel to a different shopping area
	Abandon their outing entirely
	Not sure / don't know
	Other
Q7. Why do you think your customers choose to come into the Palmerston North City Centre?	More frequently than they do now
	About as frequently as they do now
	Less frequently than they do now
	Not sure / don't know
Q8. Why do you think your customers choose to come into the Palmerston North City Centre?	*Written response*
Q9. If the City Centre had more space for everyone to enjoy and more options for them to easily get around, how often do you think your customers would be likely to visit?	More frequently than I do now
	About as frequently than I do now
	Less frequently than I do now
	Not sure / don't know

Appendix C – Survey Limitations

The survey method was designed to capture responses from as many participants as possible in the Palmerston North city centre; however, there are a number of survey limitations that need to be considered:

- As the survey was designed to be taken in-person on the street, it had to be quick to complete. This meant that some data was not able to be captured, for example, specific parking locations and spend locations.
- It is likely that the vast majority of participants only completed the survey once. This means the results may underestimate the impact of frequent visitors, such as those who work in the Palmerston North city centre.
- Most of the questions had a limited range of options, but the questions on time and money spent were open-ended. This means the data for these questions may be prone to errors, either on the part of the surveyor (entering data incorrectly) or the participant (providing a false or misleading response). In line with best statistical practice, outliers have been excluded from the analysis reported below. This is discussed in further detail in the relevant sections.
- The survey was conducted when an increasing number of cases of the Omicron variant was reported in the country. This situation may have an impact on residents' decisions to go in and out of the city at the times and locations set for the study. Whether the rise of Covid had influenced people's mode choice had not been investigated within the survey.
- The survey did not ask interviewers about their personal information (e.g., age, gender, place of residence) to ensure the survey was concise, and to support response rate. Thus, no inferences can be made based on demographical information.
- Customers were approached and surveyed in the street and within zones A, B, C, D and E only, with no customer surveys being completed inside individual premises (e.g. The Plaza). The inclusion of The Plaza as a separate zone acknowledged that people may park at The Plaza and walk to other zones in the city centre.
- The two upper levels of The Plaza carpark, accessible from Ferguson Street, have been closed since early 2021 due to earthquake damage. It is unknown what impact (if any) this has on findings from this survey.
- As the current survey was focused on peak parking periods, it under-represented week-day activities which may result in different travel behaviours.
- Surveys were undertaken under "Red Light" settings of the Covid-19 Protection Framework during the peak of the Omicron outbreak. The results of this survey should be verified through parking survey data or further surveys complete outside of COVID-19 peak outbreak period.

Appendix D – Technical Report

Note: Percentages in figures presented may not total 100% due to rounding or because survey participants were allowed to choose multiple answers to some questions

City Centre Customer Survey Results

This section of the report presents key findings of the customer survey according to the four modules structured in the questionnaire, these being: travel characteristics, carparking, outing purpose, and visiting the city centre. The term "customer" refers to surveyed participants only.

Travel Characteristics

As shown in Figure D-1, nearly 90% of customers indicated they came from somewhere outside of Palmerston North city centre, with a third saying they came from outside of Palmerston North. Just above one in ten were customers whose trips originated from within the city centre.

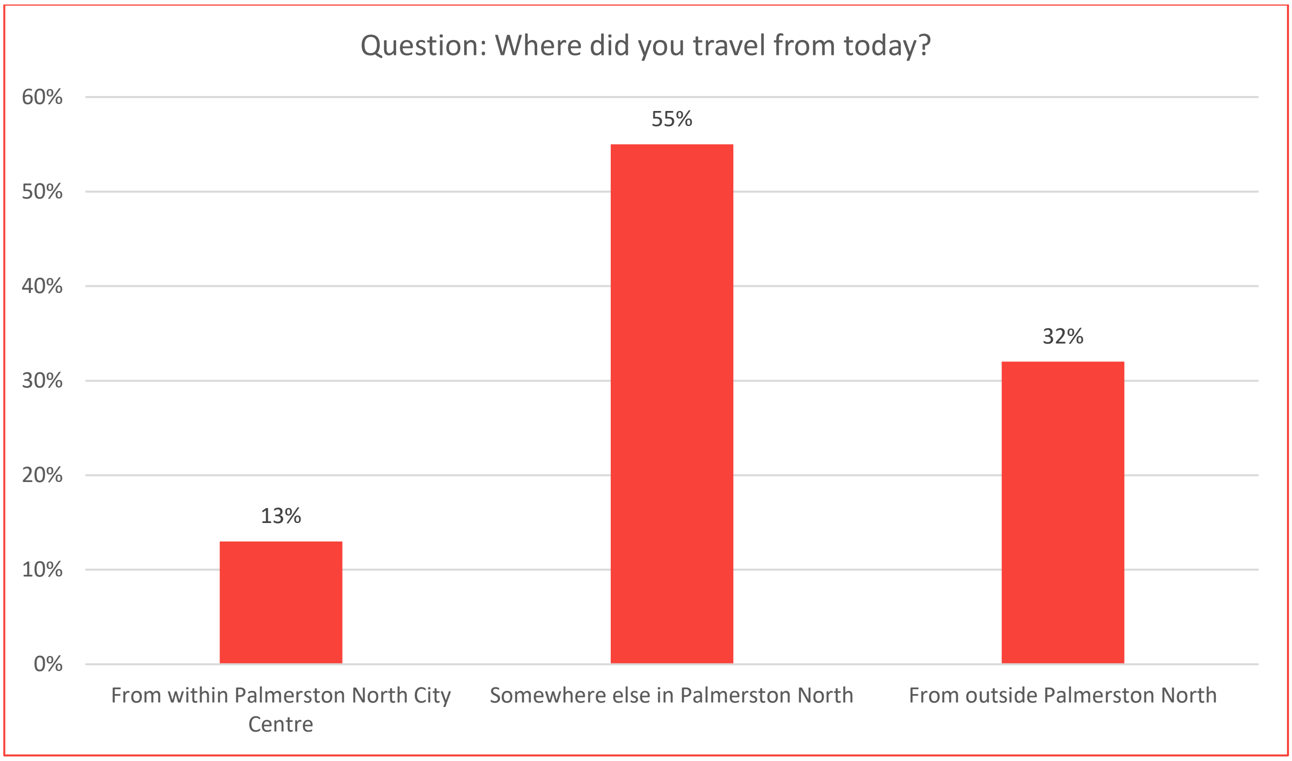


Figure D-1: Travel origin of customers (n=312)

As shown in Figure D-2, three quarters of customers drove to the city centre in a private or work vehicle, or as a passenger in a private or work vehicle. Nearly one in five customers had travelled using active modes (by foot, bike or other modes of micro mobility travel), with the remaining 6% of customers travelling by bus.

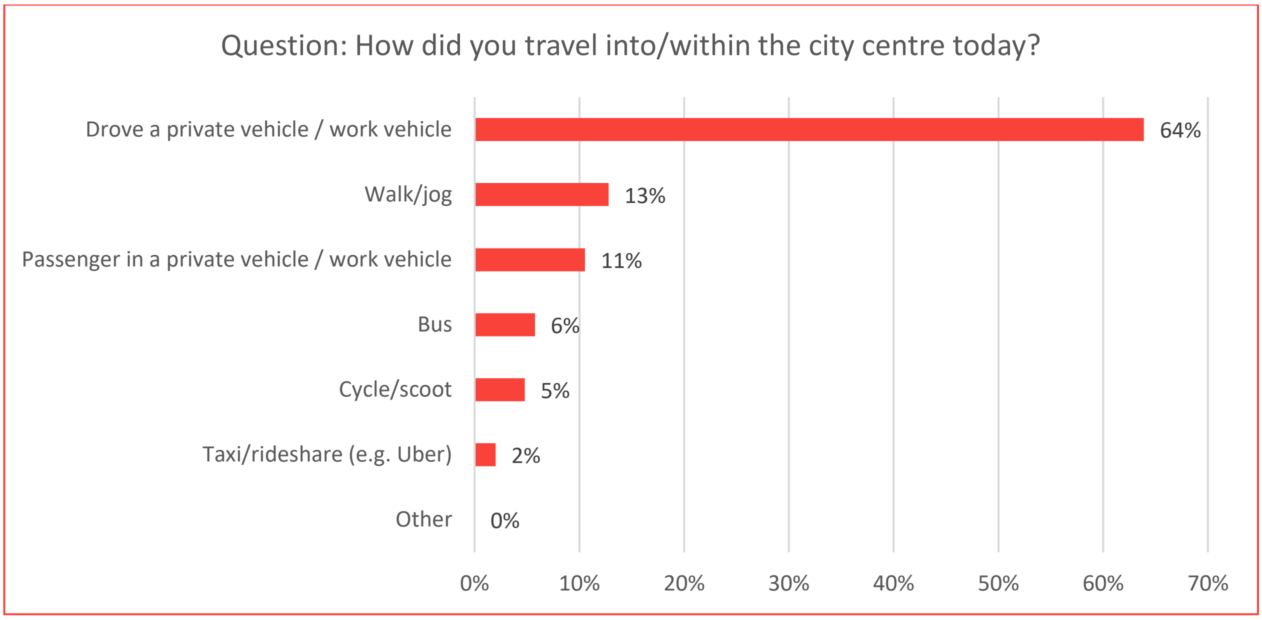


Figure D-2 Customers' travel mode into or within the city centre (n=312)

Table D-1 outlines the mode share of surveyed customers in relation to their trip origin. Most customers travelling from outside of Palmerston North city centre (89.0%) or somewhere else in Palmerston North (71.3%) drove a private or work vehicle to travel to the city centre. Nearly half of all customers whose trip had originated within in the city centre had used a private/work vehicle to access the city centre.

Table D-1: Comparison of customers mode of transport to access the city centre by trip origin

	Question: Where did you travel from today?			
How did you travel into/within the city centre today?	From outside Palmerston North	From somewhere else in Palmerston North	From within the Palmerston North city centre	Total
Bus	5 (5.0%)	12 (7.0%)	1 (2.4%)	18 (5.8%)
Cycle/scoot	1 (1.0%)	9 (5.3%)	5 (12.2%)	15 (4.8%)
Drove a private/work vehicle	77 (77.0%)	103 (60.2%)	20 (48.8%)	200 (64.1%)
Other	0 (0.0%)	1 (0.6%)	0 (0.0%)	1 (0.3%)
Passenger in a private/work vehicle	12 (12.0%)	19 (11.1%)	2 (4.9%)	33 (10.6%)
Taxi/rideshare (e.g., Uber)	1 (1.0%)	3 (1.8%)	1 (2.4%)	5 (1.6%)
Walk/jog	4 (4.0%)	24 (14.0%)	12 (29.3%)	40 (12.8%)
Total	100	171	41	312

Carparking

Customers who had travelled to Palmerston North city centre either as a driver or passenger in a private or work vehicle were asked about where they had parked and the type of carpark they had used. The majority of customers (77%) had used on-street carparking whilst one in five used off-street carparking (see Figure D-3). As shown in Figure D-4, more than a third of customers noted they had parked on Broadway Avenue (Zone B), with other key parking destinations including The Square (Zone E – 23%) and Cuba Street/George Street (Zone D – 19%).

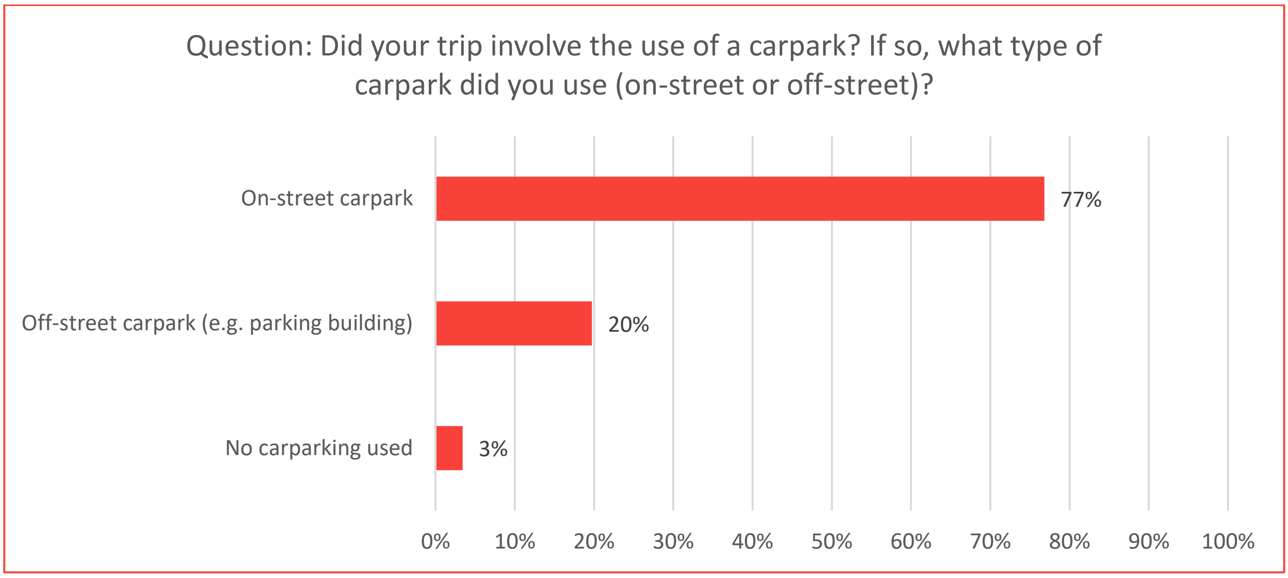


Figure D-3: Type of carpark used by customers travelling by car (n=233)

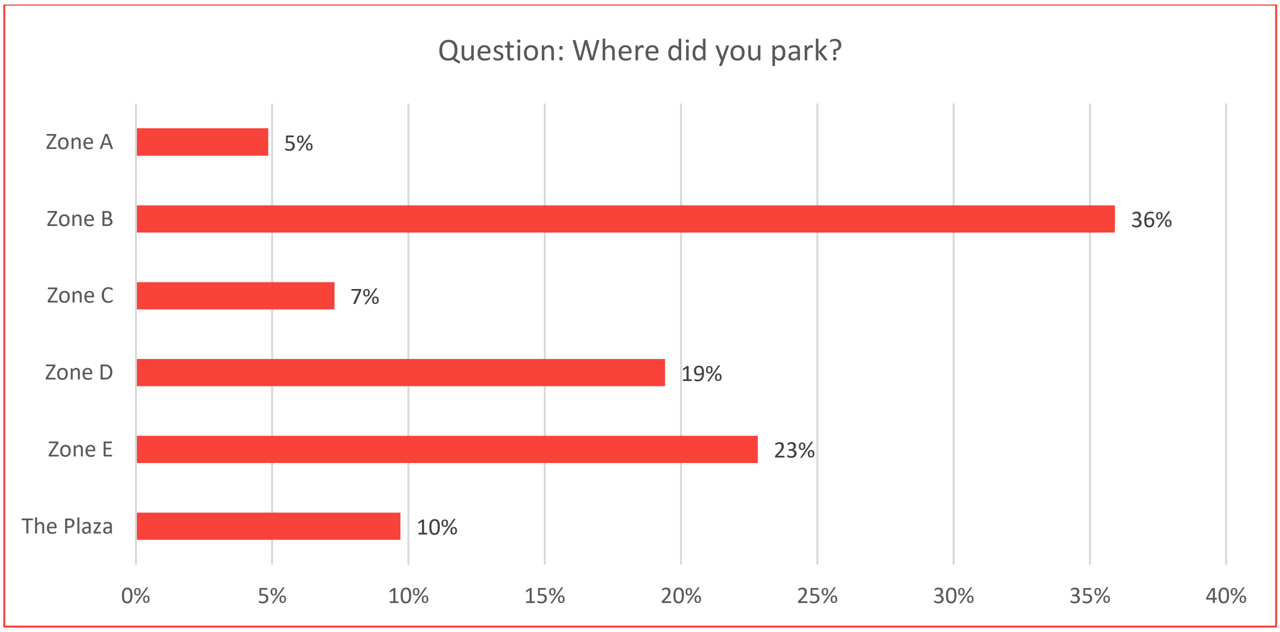


Figure D-4: Zones in the city centre where customers parked (n=206)

Note: 'Not sure / don't know' and 'Somewhere else' (n=16) not included in analysis.

Cross comparing customers stated parked zone with the type of parking facility they used indicates all zones had a mix of off- and on-street parking use (see Figure D-5). Zone B (Broadway Avenue) had the smallest proportion of off-street parking (7%) whilst The Plaza had the smallest proportion of reported on-street parking use (35%).

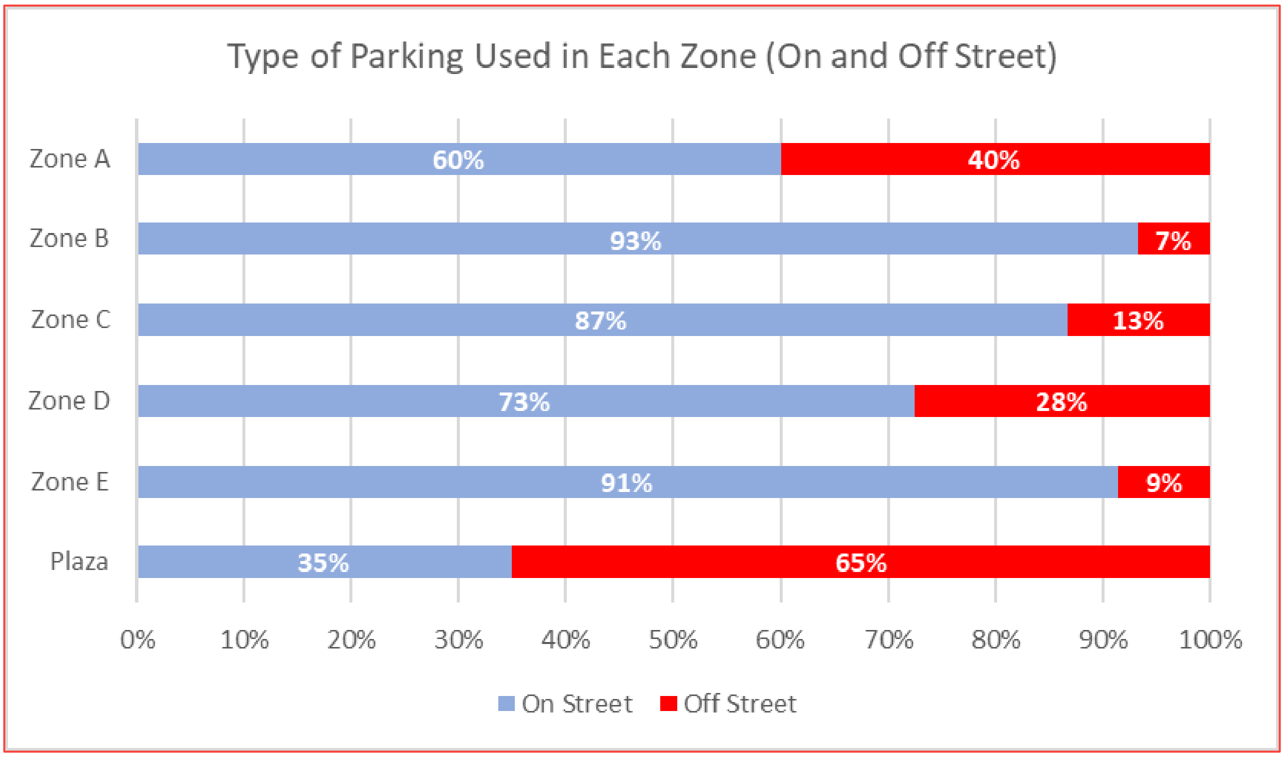


Figure D-5: Proportion of on-street and off-street carparking used by customers in each zone (n=211)

Note: 'Not sure / don't know' and 'Somewhere else' not included in analysis.

The survey explored customers' reason(s) for their carpark choice on that specific day. Convenience of the carpark's location was selected by almost two thirds of customers. Parking in the first spot found (34%) was the second most common reason provided by customers (see Figure D-6). Customers who had chosen to use off-street carparks were more likely to state the cost of parking and its safe location as their primary reason for choosing where to park, whilst those who parked on the street were more likely to state convenience or that the parking space was the first one they found (see Figure D-7).

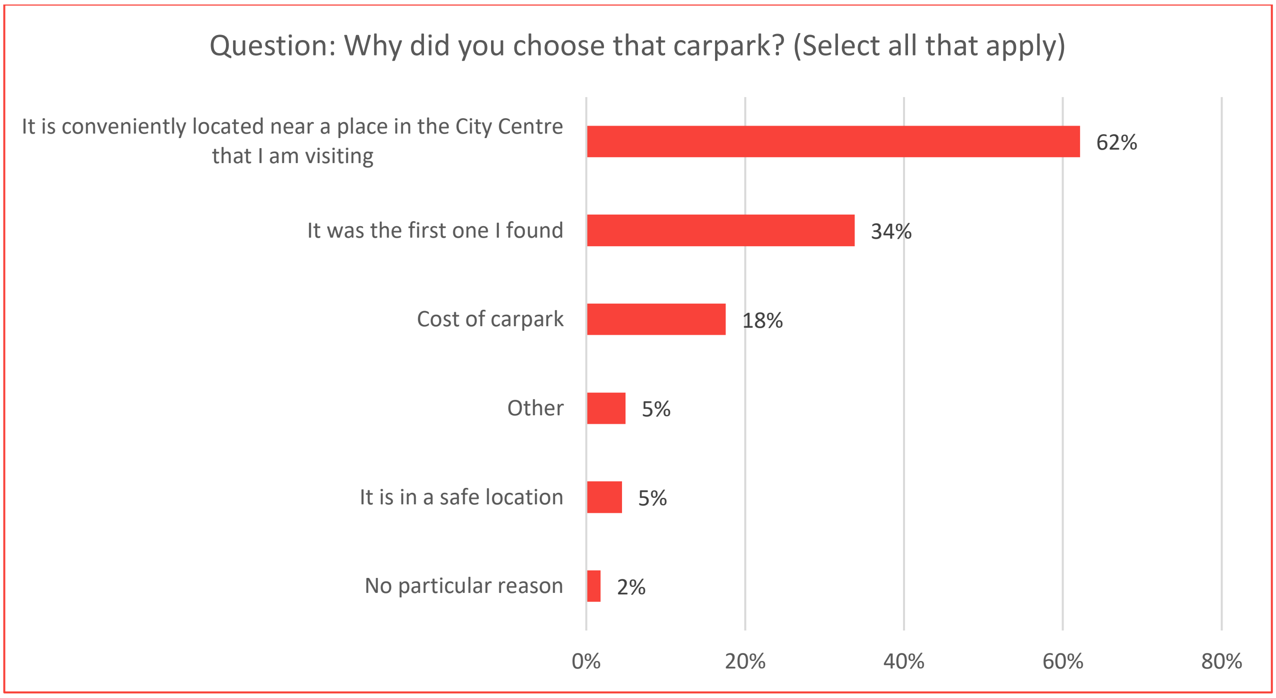


Figure D-6: Customers reasons for parking in their chosen location (n=277 answers)

Note: Multiple answers allowed.

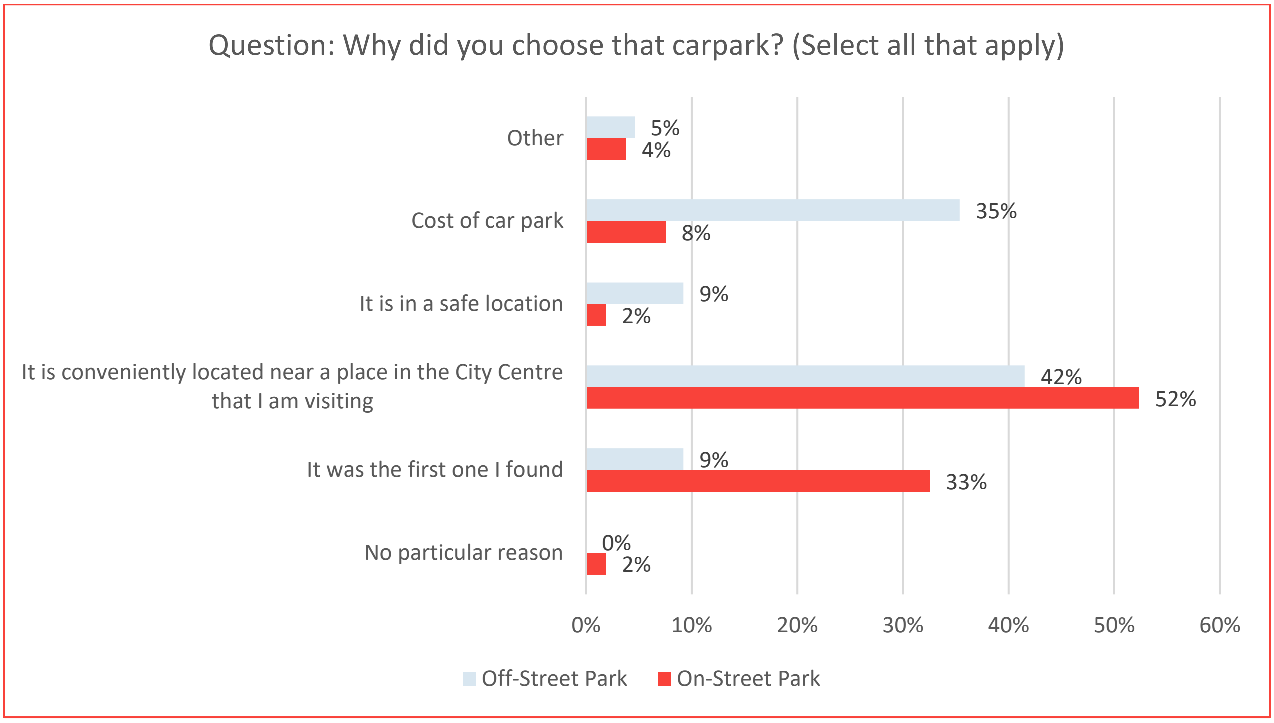


Figure D-7: Customers reasons for parking in their chosen location by carpark type (n=277)

Note: Multiple answers allowed.

The survey also asked customers about what they would have done if they had not been able to find a park in their reported location. The majority of customers (85%) reported that they would keep looking for another carpark. No customers stated they would travel to alternative shopping centres outside of the city centre and a very small proportion of responders said they would abandon the trip altogether. Only 8% indicated they would travel to another area within the city centre if they could not find a space in their intended carparking area (see Figure D-8 below), indicating city centre customers are committed to shopping in the central city and/or are confident they would find a carpark near to where they intended to park.

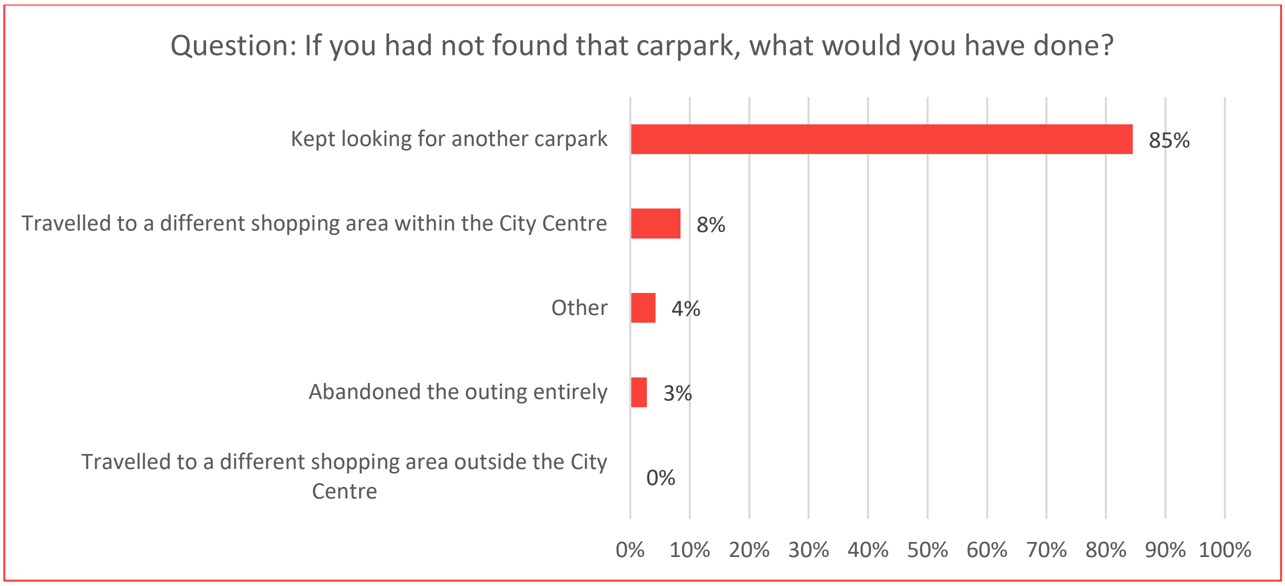


Figure D-8: If customers had not found that parking space, what would they have done (n=213)

Note: 'Not sure/don't know' responses (n=5) not included in analysis.

Outing Purpose

Figure D-9 shows customers' reported reasons for visiting the city centre that day. The two most common reasons provided by customers were "going to restaurants/café/bars" (49%) and "going to retail shops" (46%), reflecting the evening and weekend timing of data collection. A more detailed analysis of customer's trip purpose by trip origin is shown within Figure D-10.

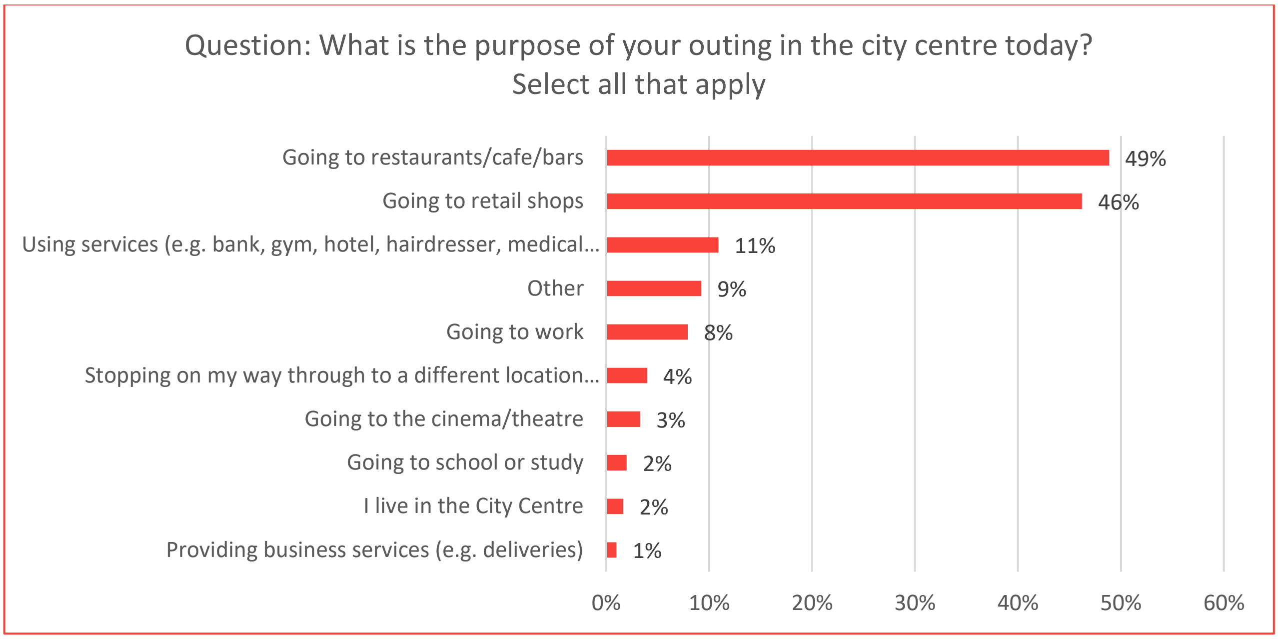


Figure D-9: Customers purpose of outing in the city centre (n=409)

Note: Multiple answers allowed.

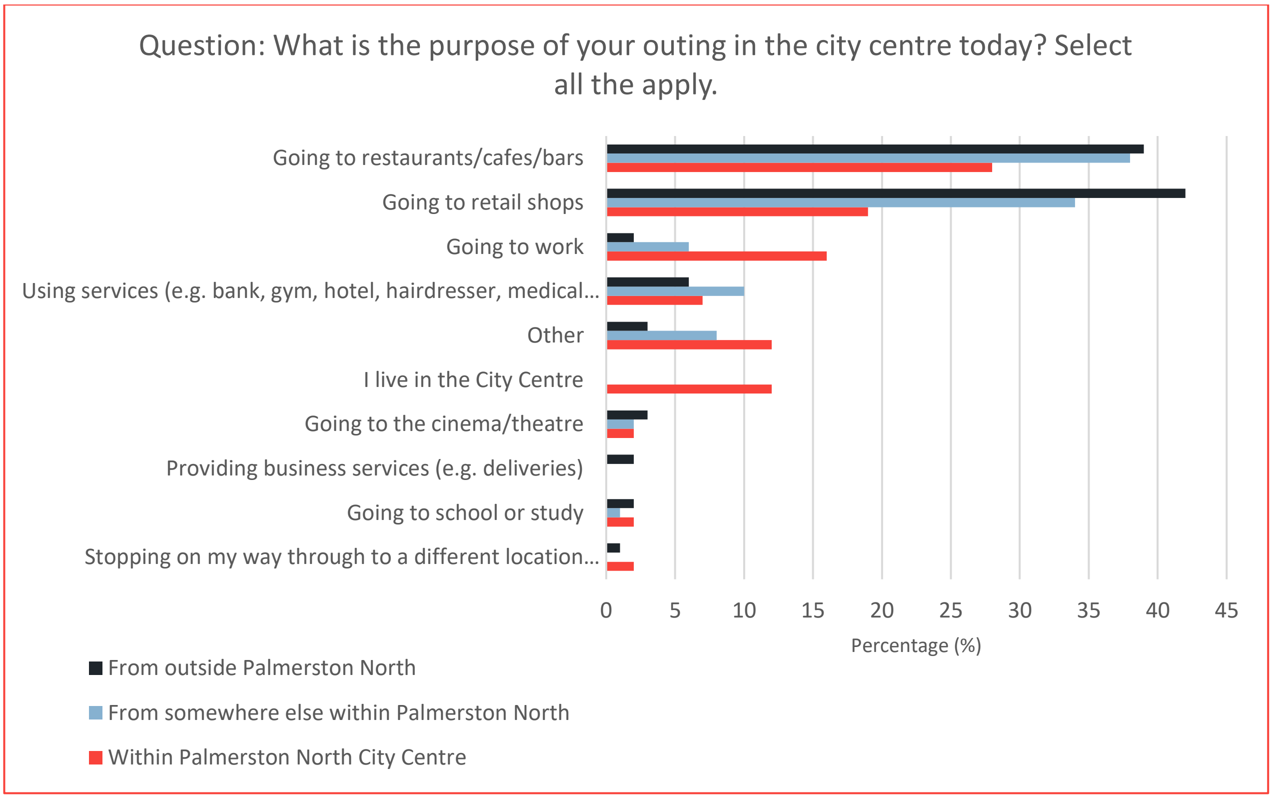


Figure D-10: Customers purpose of outing in the city centre by trip origin (n=400)

Note: Multiple answers allowed.

Customers were asked to identify the zone(s) they are likely to be visiting as part of the trip. Figure D-11 shows that Zone B (Broadway Avenue – 54%) was most likely to be visited by the customers followed by The Plaza (40%). A comparative analysis of the number of zones customers intended to visit and how they travelled to the city centre (i.e. car vs non-car modes) indicate those travelling by foot, bike, e-scooter or public transport are more likely to travel across multiple zones compared with those travelling by car (see Figure D-12).

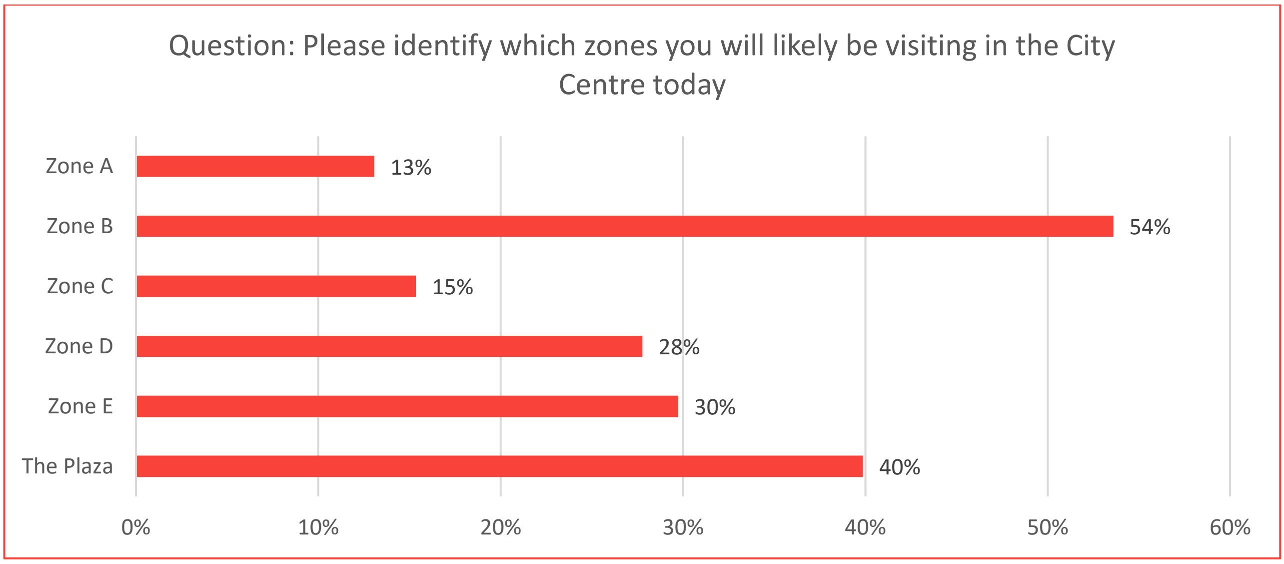


Figure D-11: Customers stated zones for visitation within the city centre (n=306)

Note: 'Not sure/don't know' responses (n=3) not included in analysis. Multiple answers allowed.

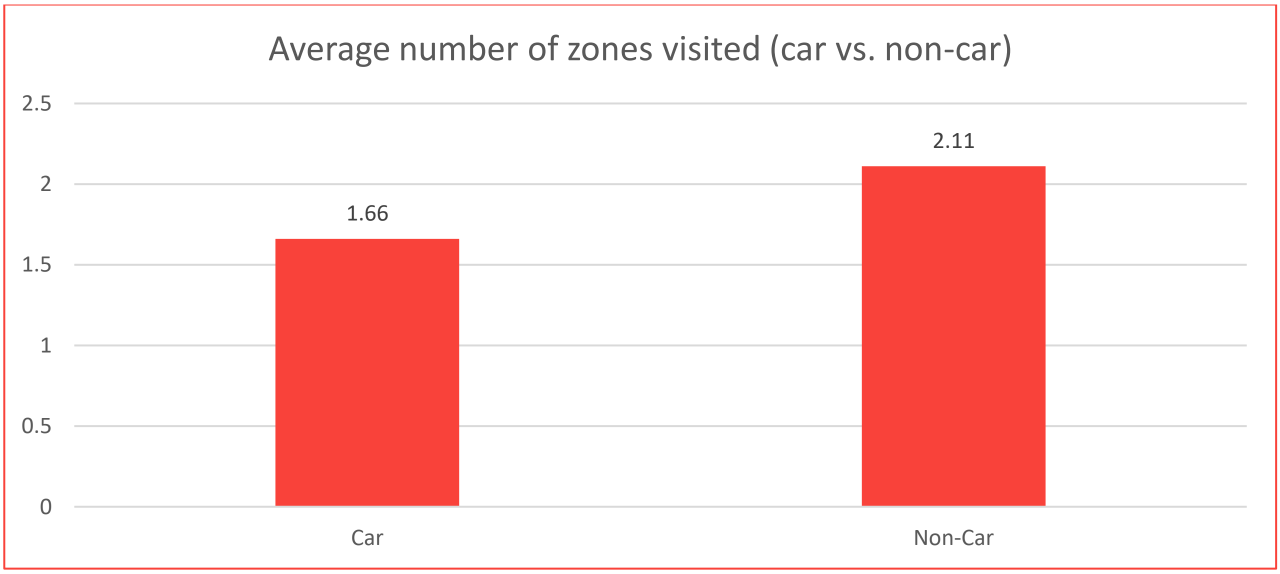


Figure D-12: Comparative analysis of the number of zones visited by customers and their mode of transport (n=544)

For customers who had travelled to the city centre by car, the survey results were analysed to compare where customers had parked and the likely zone(s) they were expecting to visit (see Table D-2 and D3). Almost all customers who had parked within Zone B (Broadway Avenue) and Zone D (Cuba Street/George Street) stated their intension to visit the zone they parked in (both 95%).

Comparatively, customers parked in Zone A (Queen Street/King Street – 60%), Zone C (Main Street/Church Street – 42%) and Zone E (The Square – 47%) were less likely to be visiting the same zone they were parked in. The survey results suggest that the location a customer plans to visit is not necessarily restricted to their parking zone and customers are willing to walk distances between their parking zones and intended shopping destination.

Table D-2: Zones visited by customers based on the parking zone used (raw data).

ZONE PARKED		Please, identify which zones you will likely be visiting in the City Centre today?					
	n	ZONE A	ZONE B	ZONE C	ZONE D	ZONE E	THE PLAZA
ZONE A	10	6	7	2	2	1	5
ZONE B	74	5	70	7	4	13	12
ZONE C	12	0	5	5	2	2	6
ZONE D	39	3	3	3	37	8	8
ZONE E	45	7	15	5	10	21	25
THE PLAZA	20	3	9	4	0	5	18

Note: 'Not sure/don't know' and 'somewhere else' responses (n=16) not included in analysis.

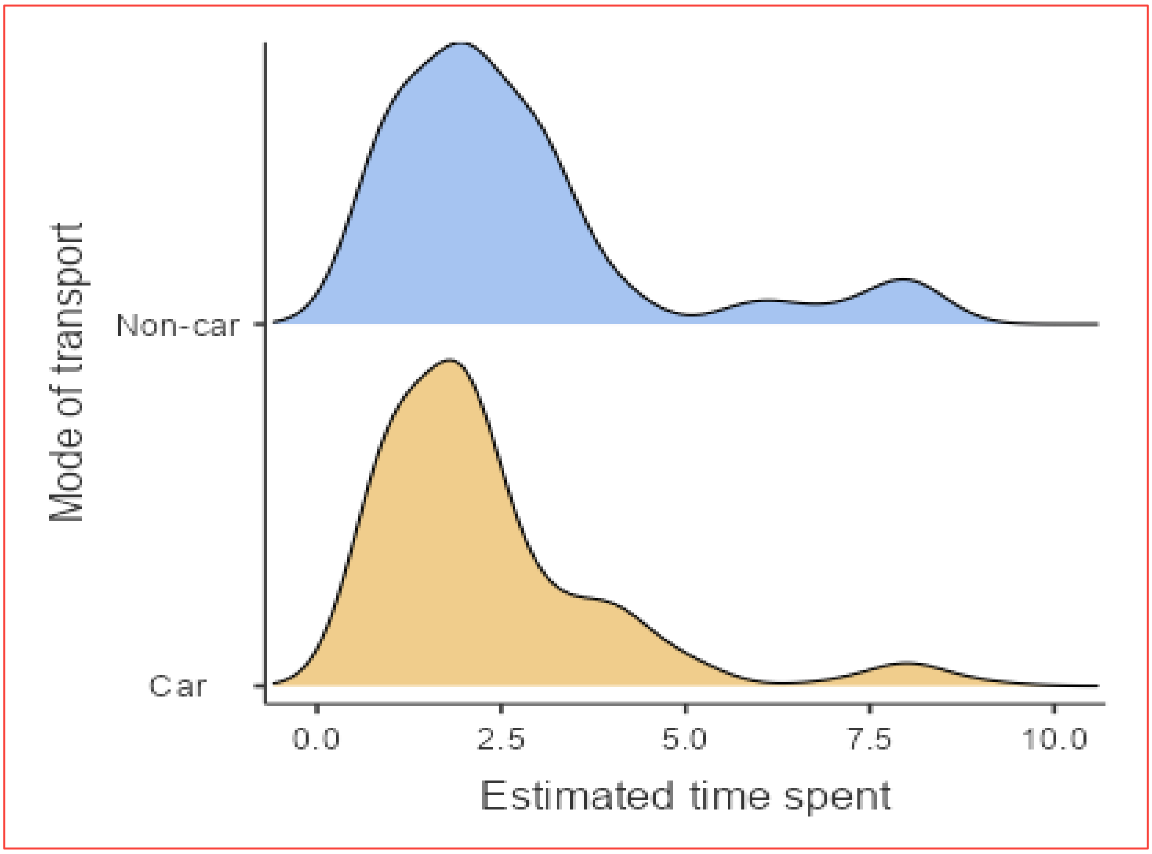
Multiple answers allowed for likely visiting zone.

Table D-3: Customers' likelihood of visiting zones based on parking zone used

		Zone Visited					
		Zone A	Zone B	Zone C	Zone D	Zone E	The Plaza
Zone Parked	Zone A	60%	70%	20%	20%	10%	50%
	Zone B	7%	95%	9%	5%	18%	16%
	Zone C	0%	42%	42%	17%	17%	50%
	Zone D	8%	8%	8%	95%	21%	21%
	Zone E	16%	33%	11%	22%	47%	56%
	The Plaza	15%	45%	20%	0%	25%	90%

Customers were asked to estimate how long they were planning to spend in the city centre. Six responders stated they expected to spend longer than ten hours in the city centre, and were considered outliers; thus were removed from the analysis. From valid 250 responses, the average time spent in the city centre was 2 hours and 24 minutes.

On average, those who travelled by car estimated they would spend 2 hours and 20 minutes in the city centre, while those who had travelled by non-car modes estimated they would spend 2 hours and 39 minutes in the city centre. For both groups the median was 2 (see Figure D-13).



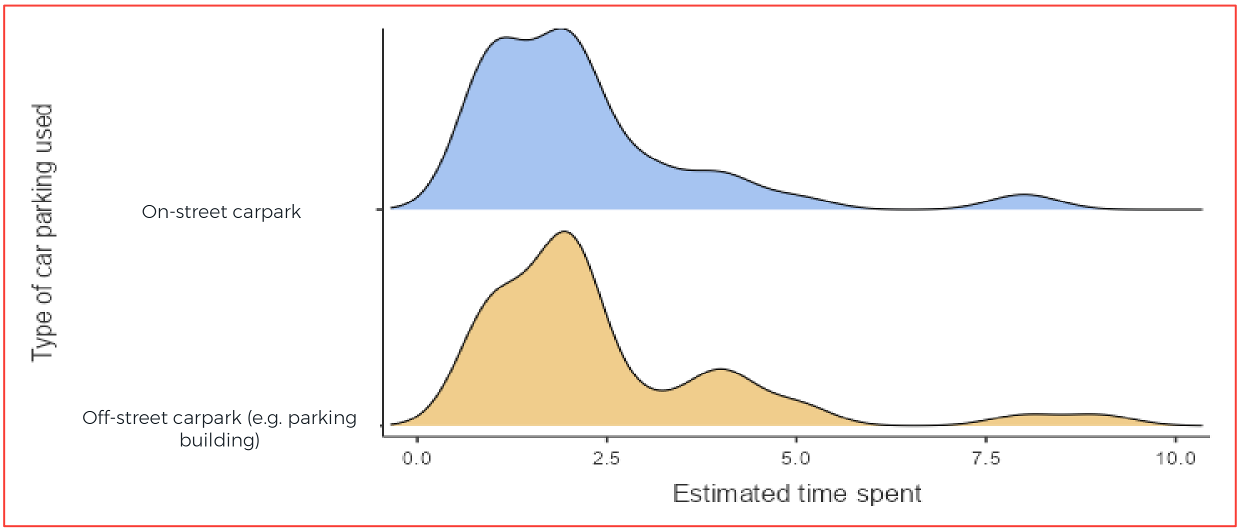
	Mode of transport	N	Missing	Mean	95% Confidence Interval Lower	95% Confidence Interval Upper	Median	Mode	SD*
Estimated time spent	Non-car	63	0	2.65	2.19	3.11	2	2.00	1.88
	Car	187	0	2.33	2.10	2.56	2	2.00	1.60

Note: * (standard deviation).

Figure D-13: Comparison of customers estimated time spent in the city centre by mode (n=250)

Focusing on those who travelled by car, further analysis was undertaken of customers estimated time spent in the city centre in terms of the type of carparking they used (on-street and off-street carparking).

Those customers who said they used an on-street carpark intended to spend on average 2 hours and 12 minutes in the city centre, while those who used off-street carparking intended to spend an average 2 hours and 31 minutes in the city centre. These results may reflect that on-street parking tends to be metered and/or time restricted, compared with off-street parking that allows the customer to pay for parking as they exit the parking complex. For both groups the median was 2 hours (see Figure D-14).



	Type of car parking used	N	Missing	Mean	95% Confidence Interval Lower	Upper	Median	Mode	SD*
Estimated time spent	On-Street carpark	136	0	2.20	1.94	2.46	2.00	2.00	1.53
	Off-street carpark (e.g. parking building)	39	0	2.51	1.94	3.08	2	2.00	1.82

Note: * (standard deviation).

Figure D-14: Customers estimated time spent in the City Centre and type of carparking used (n=175)

Customers were also asked to provide an estimate of how much money they planned to spend while in the city centre. Two of the customers surveyed expected to spend in excess of $2,000 and were deemed as outliers as they were significantly higher than the rest. These have been removed from analysis. The average expected spend of the remaining customers was calculated as $104.50 with a median expected spend of $60.00. The distribution of customers responses is shown in Figure D-15.

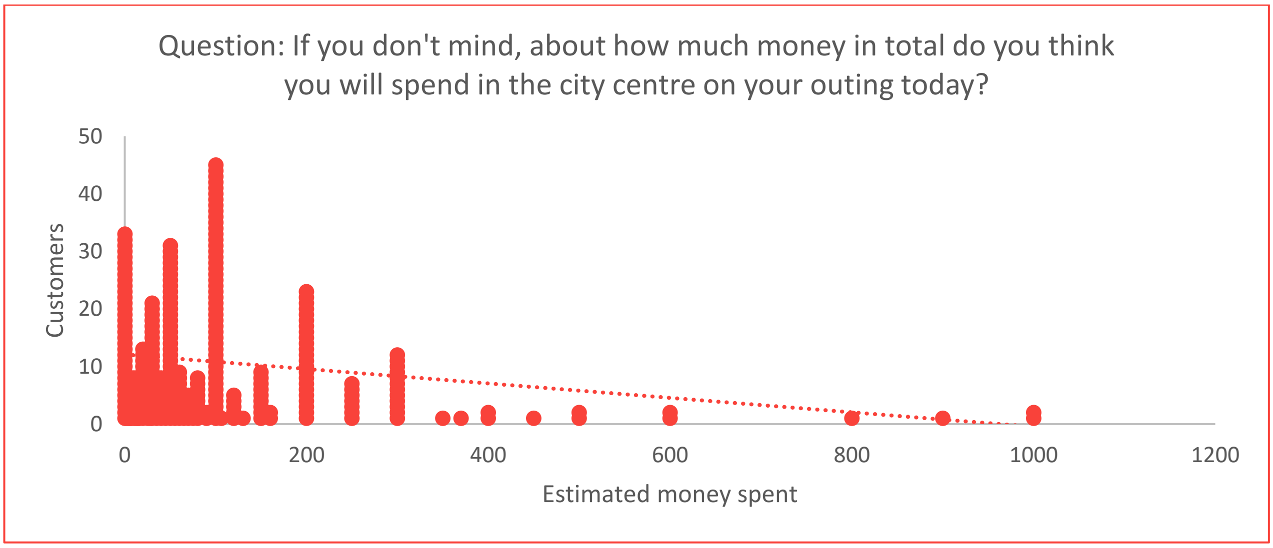


Figure D-15: Customers' estimated money spent in the city centre (n=289)

Figure D-16 identifies the relationship between the average estimated customer spend and customers trip origins. This indicates that those travelling greater distance into the city centre expect to spend more money per visit. These findings indicate customers visiting from outside of

Palmerston North are likely to be bulk buying or coming for a social or recreational reasons, and therefore spending more per trip.

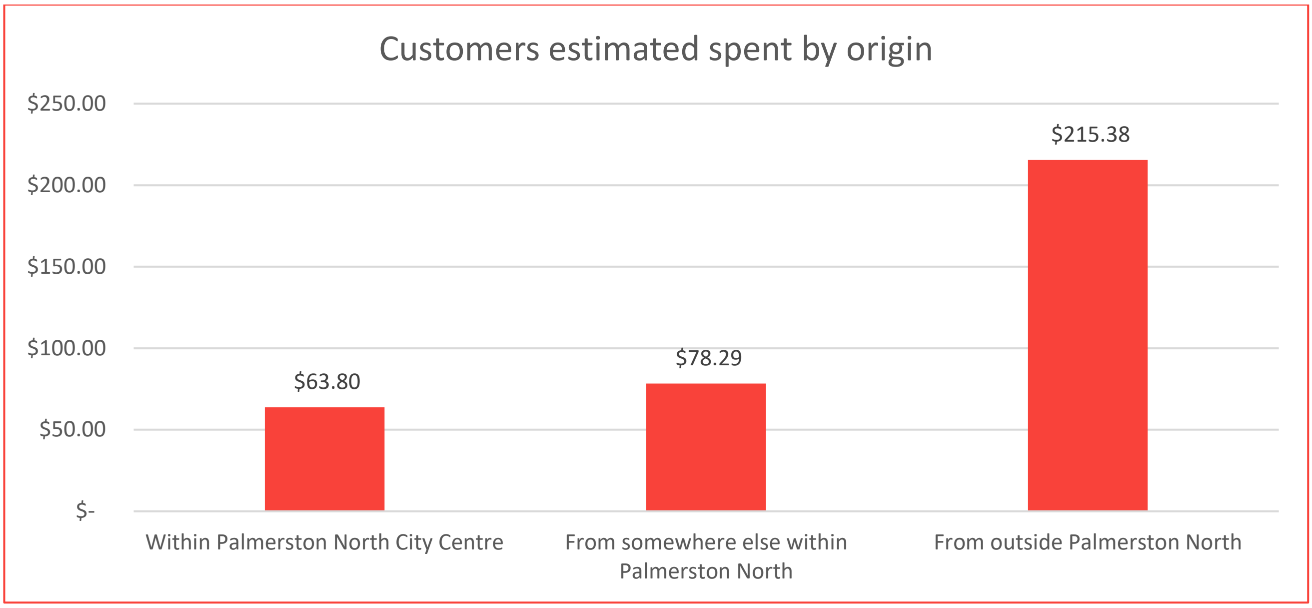
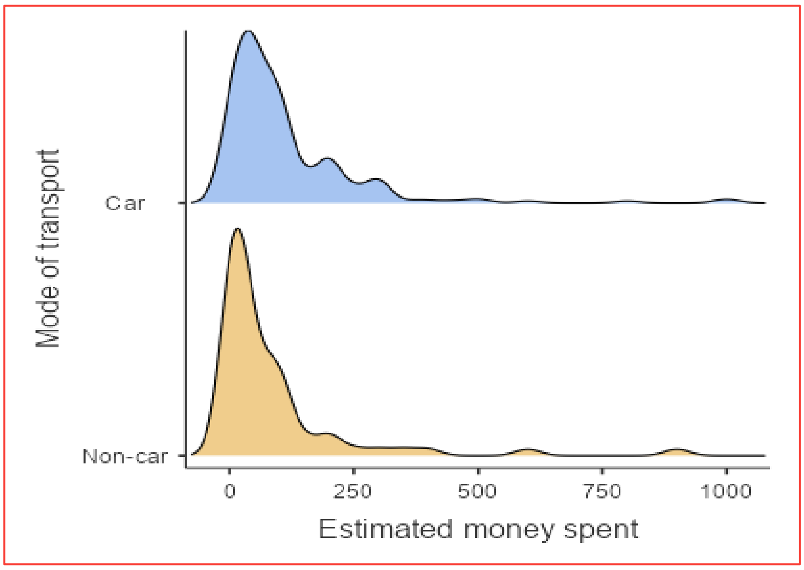


Figure D-16: Estimated spend by customers by origin (n=289)

Additional analysis was performed in relation to customers expected expenditure and the mode of transportation they had used to access the city centre (car vs non car modes). On average, customers who used a car estimated they would spend $110.70. This was higher compared with the average money spent by those who did not use a car ($84.80). The median for these two groups was $67.50 and $30.00 respectively (see Figure D-17).



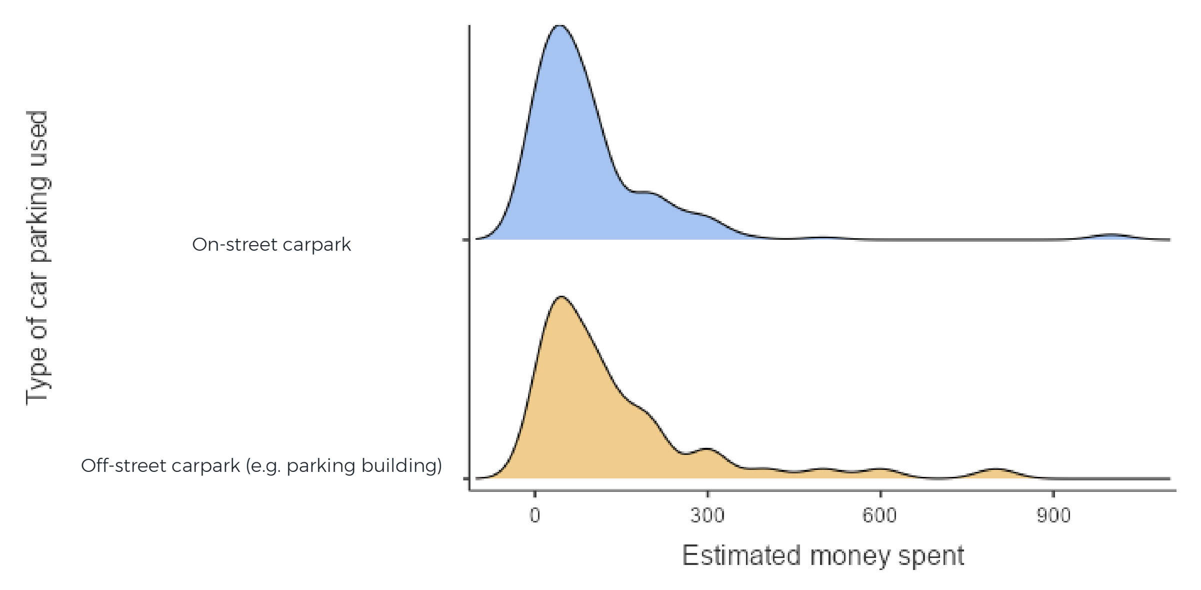
	Mode of transport	N	Missing	Mean	95% Confidence Interval Lower	95% Confidence Interval Upper	Median	Mode	SD*
Estimated money spent	Car	220	0	110.7	92.1	129	67.5	100	141
	Non-car	69	0	84.8	50.6	119	30	0	145

Note: * (standard deviation).

Figure D-17: Customers estimated money spent in the City Centre by transport mode (n=289)

Of customers who had driven into the city centre, those who used on-street carparking expected to spend less money than those who used an off-street carpark (with a mean of $98.90 and $144.30

respectively). The median expected expenditure for those who used on-street carparks was $60.00, and $100.00 for users who opted to use off-street carparks (see Figure D-18).



	Type of car parking used	N	Missing	Mean	95% Confidence Interval Lower	95% Confidence Interval Upper	Median	Mode	SD*
Estimated money spent	On-street carpark	164	0	98.9	78.5	119	60.0	100	133
	Off-street carpark (e.g. parking building)	44	0	144.3	95.5	193	100.0	100	165

Note: * (standard deviation).

Figure D-18: Customers estimated money spent in the city centre and type of carparking facility used (n=208)

Further analysis of customers expected expenditure across each of the surveyed periods was undertaken. As shown in Table D-4, customers who answered the survey on Saturdays estimated they will spend an average of $130, the highest of the four survey timeslots.

Table D-4: Customers estimated money spent and agreed times for data collection (n=289)

	Day and time survey was taken	N	Mean	Median	SD*
Estimated money spent	Sundays from 11am to 3pm	88	89.4	47.5	143.5
	Fridays from 6pm to 8pm	67	87.0	65.0	89.3
	Saturdays from 11am to 3pm	106	130.3	100.0	164.4
	Fridays from 11:30am to 1:30pm	28	96.7	30.0	141.1

Note: * (standard deviation).

Visiting the City Centre

The survey also collected data about how frequently customers visit the city centre. Over a third said they visit the city centre "several times a week or more", whilst a similar portion of customers (32%) reported they visit the city centre "about once or twice weekly". Other options such as visiting the city centre fortnightly or less than monthly were much less frequent (see Figure D-19 for details).

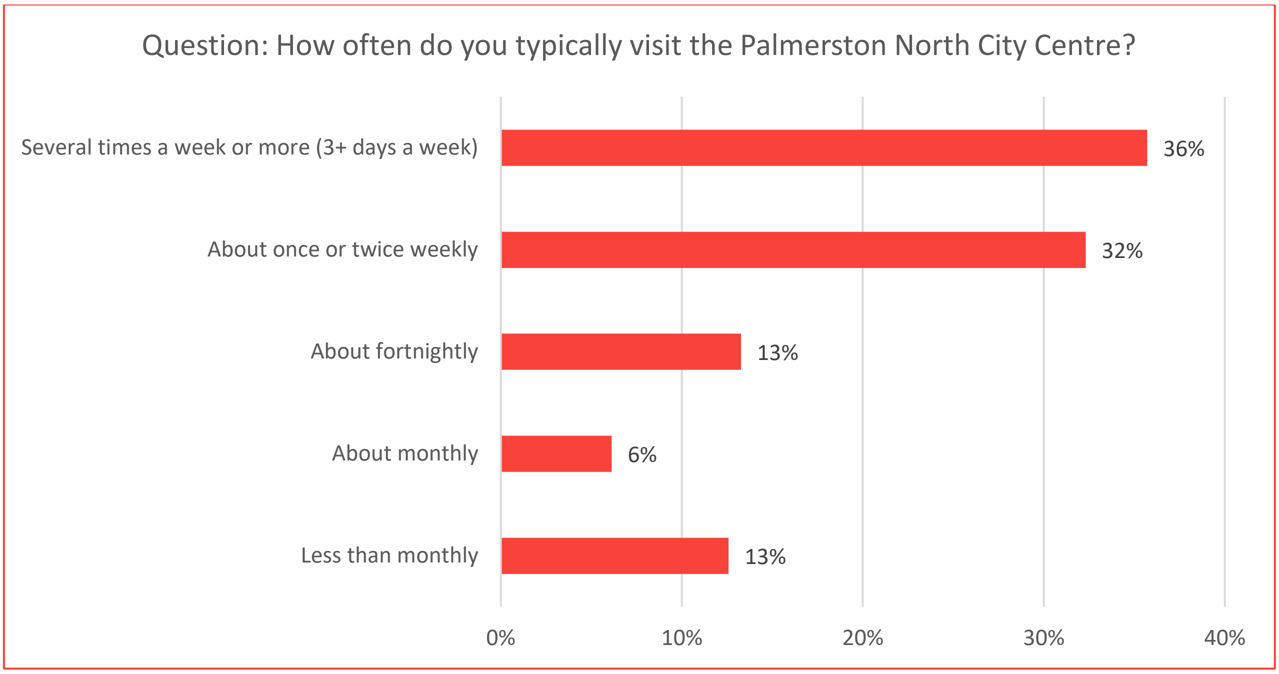


Figure D-19: How frequently customers visit the city centre (n = 294)

Additional analysis was undertaken to determine what relationship (if any) existed between customers trip origins or the mode of transport they used, and the stated frequency of visitation to the city centre. The surveys indicate customers who travel a greater distance to access the city centre are likely to visit less frequently than those living closer to the city centre (see Figure D-20). Customers travelling by non-car modes also expect to visit the city centre more frequently than those travelling by car (see Figure D-21).

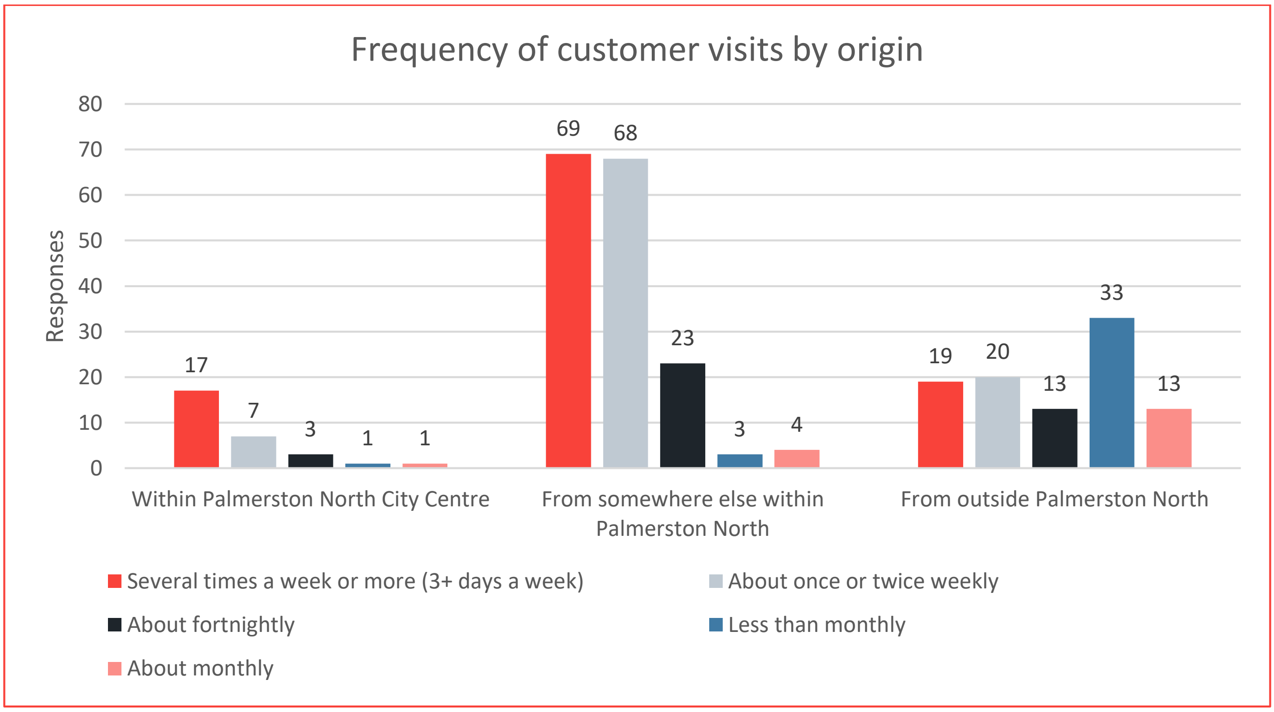


Figure D-20: Frequency of customer visits by origin (n=294)

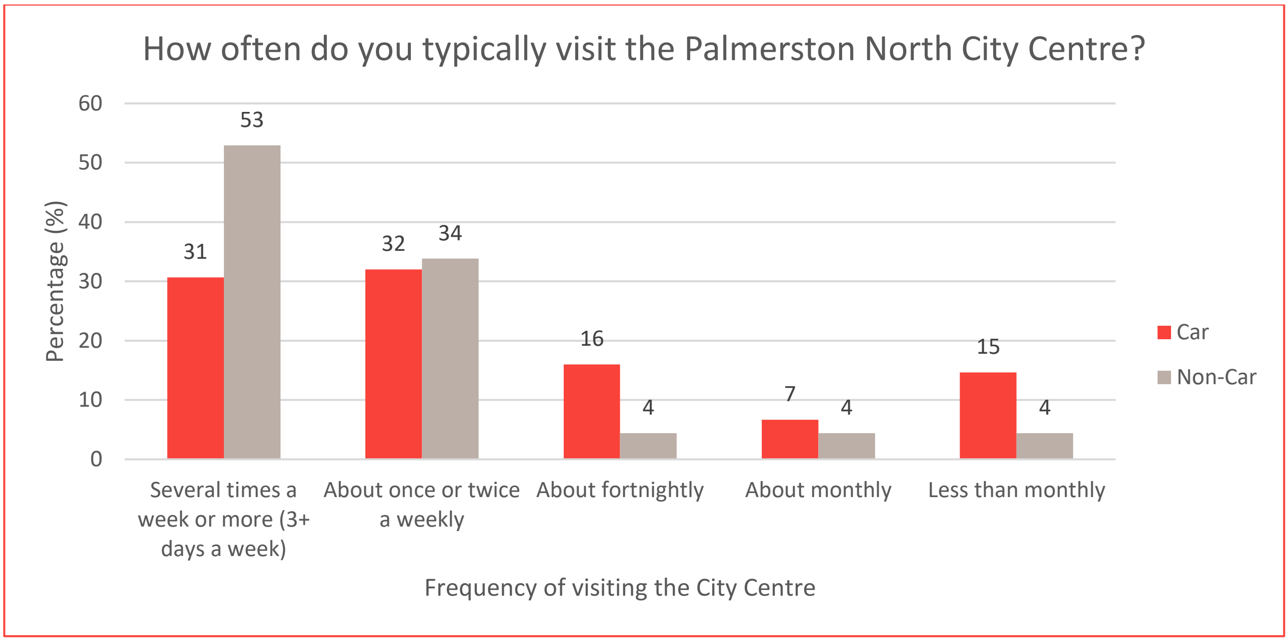


Figure D-21: Estimated frequency of visitation into the city centre by mode of transport (n=293)

Finally, customers were asked how often they might visit the city centre if more space was available for everyone to enjoy and more options were made available for people to easily get around. Almost all customers felt they would visit the city centre about as frequently (58%) or more frequently (41%) than they do now (see Figure D-22).

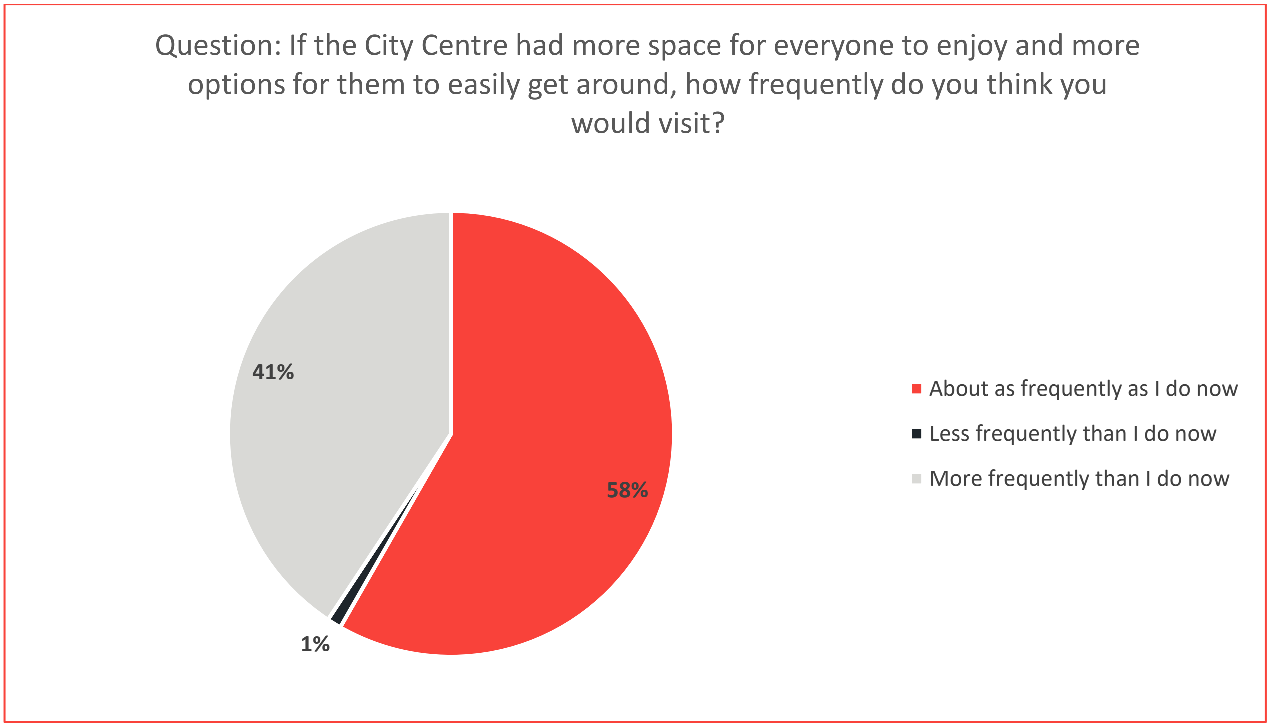


Figure D-22: How frequently customers stated they would visit the city centre if more public space was available for them to enjoy, and more options were available for them to easily travel around (n=290)

Note: 'Not sure/don't know' responses (n=10) not included in analysis.

Retailer Survey Results

This section of the report presents key findings of the retailer survey according to the three modules structured in the questionnaire, these being: business zone, travelling to the business, and customer preferences. As shown in Figure D-23, the majority of participating retailers were located on Broadway Avenue (Zone B), Cuba Street/George Street (Zone D – 24%) or The Square (Zone E – 21%).

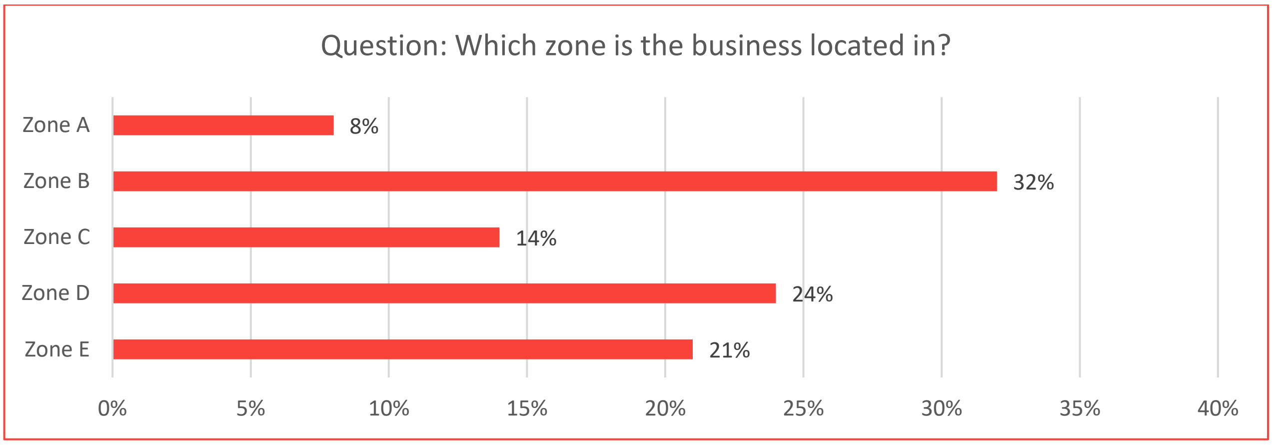


Figure D-23: Zone the business is located in (n=117)

Note: Option 'The Plaza' not included as these businesses were not surveyed.

Travelling to Businesses

Participating retailers were asked to estimate the percentage of their customers that travel from Palmerston North city centre, somewhere else in Palmerston North, and outside Palmerston North (see Figure D-24). Overall, the retailers overestimated the proportion of customers that travel from within Palmerston North city centre and underestimated how many travel from areas outside of the city centre. For example, retailers tended to over-estimate the percentage of customers travelling from within the city centre (34%) compared to responses provided by customers (13%).

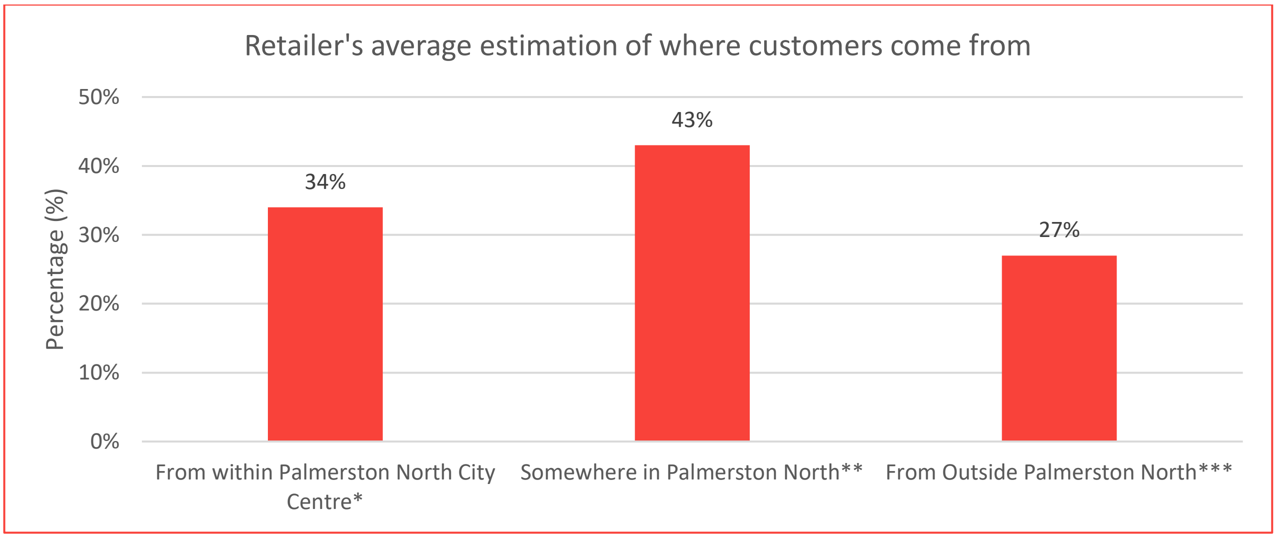


Figure D-24: Retailers estimates of where their customers travel from

Note: * (n= 96), * * (n= 100), *** (n= 98).

Retailers were then asked to estimate (in percentage terms) how their customer travelled to their business (see Figure D-25). Retailers estimated proportion of customers travelling by car/private vehicle was similar to the numbers recorded within the customer survey (74%). Similarly, retailer estimates of the number of customers travelling by foot or by bike was similar to the actual recorded data within the customer survey (18%).

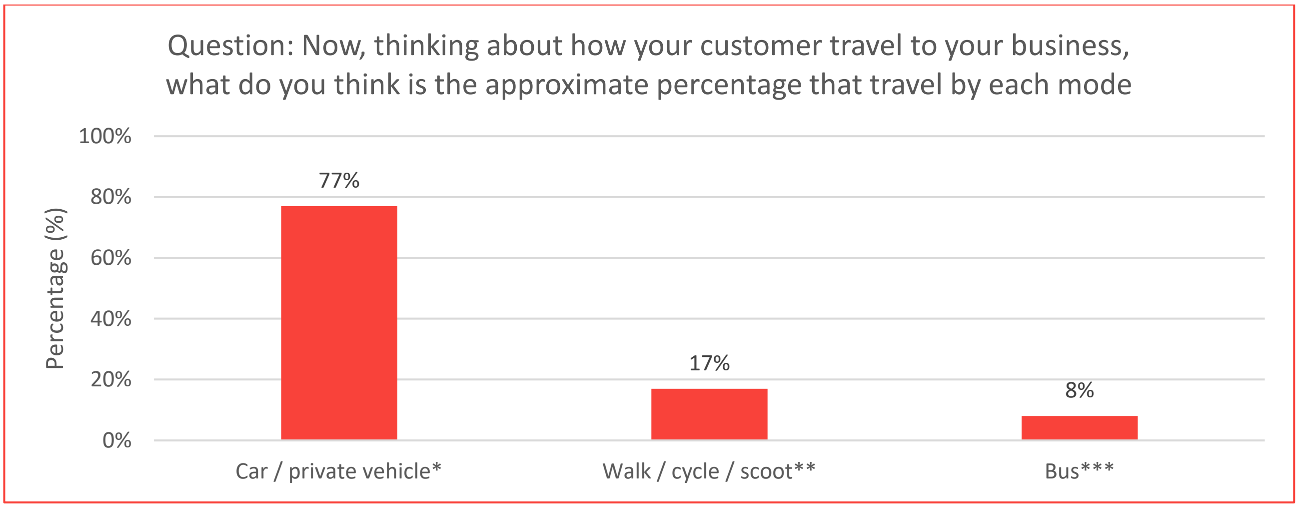


Figure D-25: Retailers estimate of how customers travel to their business

Note: * (n= 102), * * (n= 93), *** (n= 78).

Retailers were asked to estimate the percentage of their customers who drive and park in the same zone that the retailer's business is situated. Figure D-26 shows the distribution of the retailer responses. Although there was a range in retailer responses, the data indicates that overall retailers estimated 81% of their customers park in the same zone as the zone their businesses is located in.

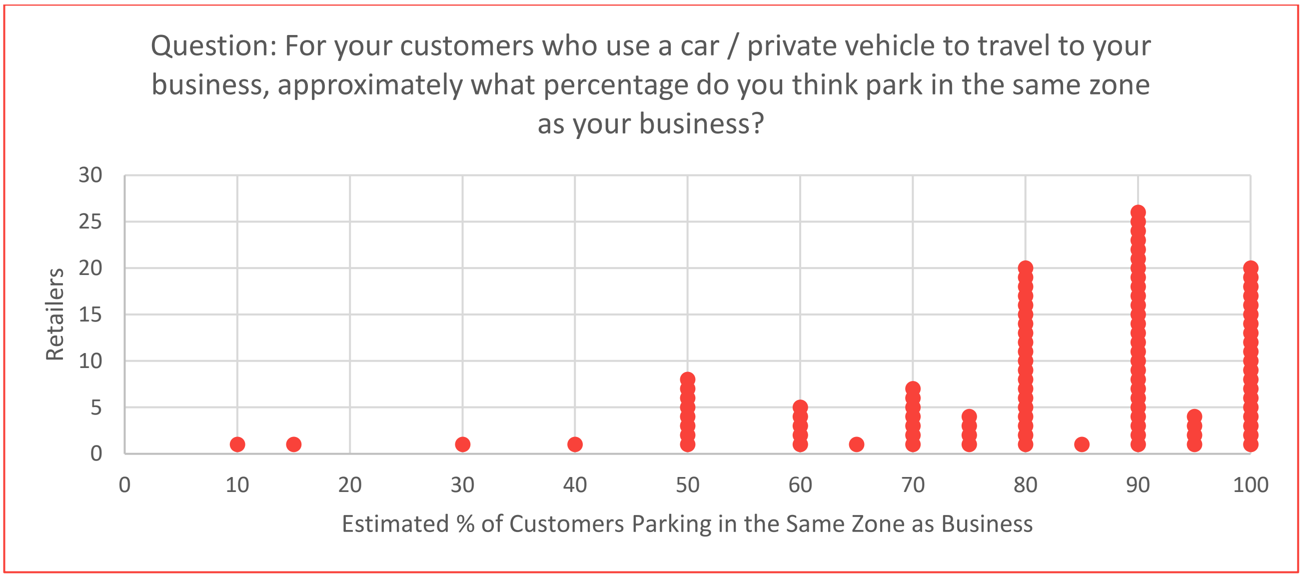


Figure D-26: Retailers' estimated percentage of customers who park in the same zone as their businesses (n=100)

Note: The map with agreed zones for data collection was shown to retailer participants.

Comparatively, Figure D-27 shows the proportion of customers who expected to visit each zone based on where they had reportedly parked. The data highlights that whilst the majority of customers visiting Zone B (Broadway Avenue) and Zone D (George Street/Cuba Street) had also parked within these zones (63% and 60% respectively), those parking in Zone A (Queen Street/King Street), Zone C (Main Street/Church Street) and Zone E (The Square) a had a much lower proportion of customers parking and visiting destinations within the same zone (26%, 25% and 25% respectively). The survey results indicate that some retailers may overestimate how many of their customers that travel by private car also park in the same zone as their business.

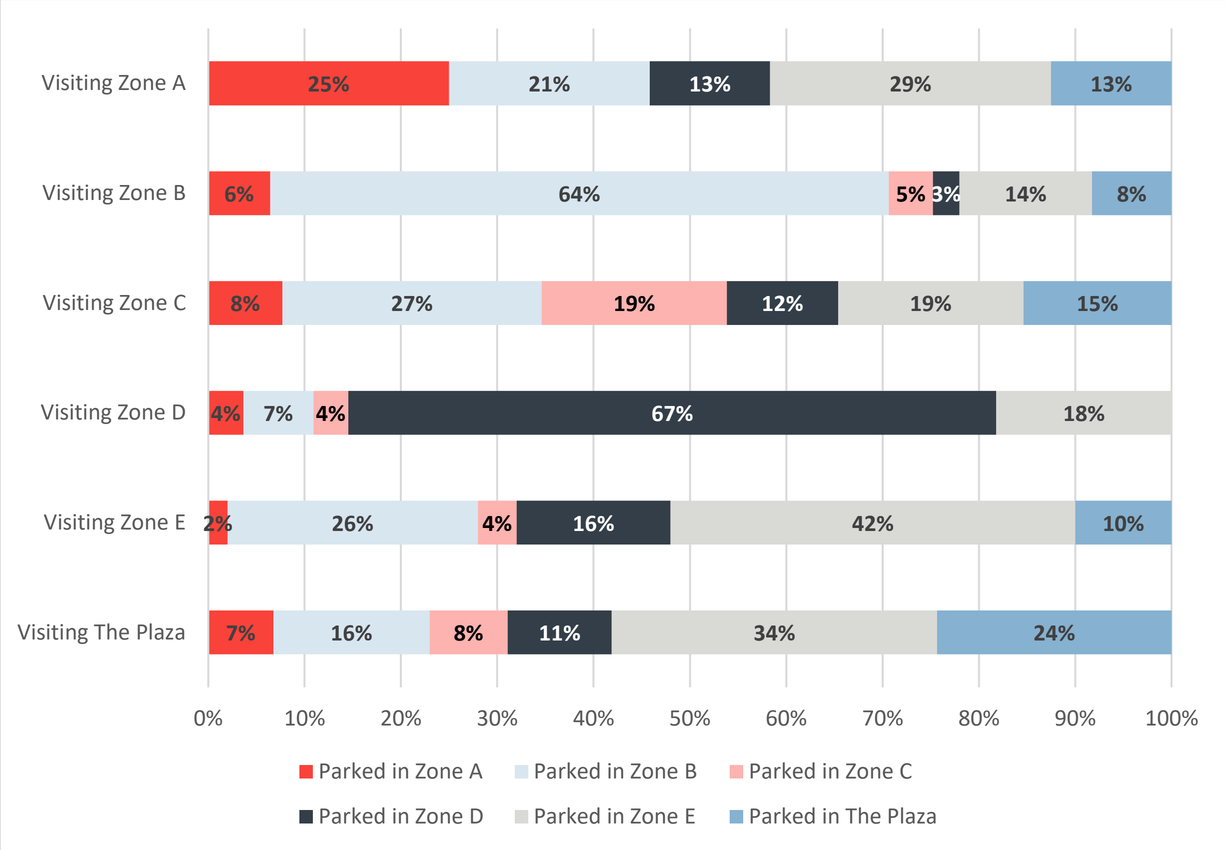


Figure D-27: Proportion of customers visiting each zone by their reported parking zone (n=338)

Retailer Perceptions of Customer Preferences

Retailers were asked an open-ended question about what they think is the most important factor customers consider when choosing where to park. The majority of participating retailers (118) used the word '**convenience**' to describe customers' primary reason for choosing where to park. Other responses included proximity to their destination and the cost of parking, but only amongst a few retailers. Overall, these views seem to reflect the findings from the Customer survey (refer to Figure D-6 shown previously).

When asked about what their customers would do if carparking was not conveniently located near their business, over a half of retailers indicated their customers would keep looking for another carpark. Meanwhile, 20% said their customers will travel to a different shopping area within the city centre, and a similar proportion thought that their customers would abandon the outing entirely (see Figure D-28 below).

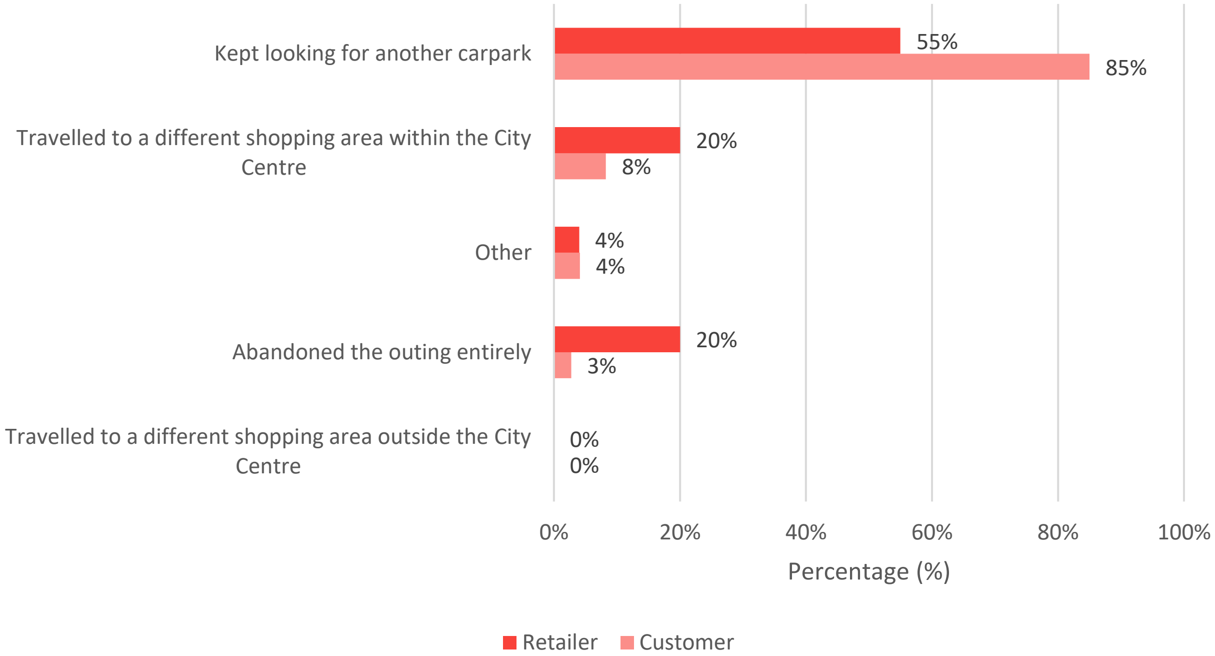


Figure D-28: Comparison of retailers' perceptions and customer's expressed actions if no carparking available where they intended to park (Retailer n = 98, Customer n = 213)

They survey results indicate retailers tend to underestimate customers' persistence with getting a carpark and also overestimated the percentage of customers that would abandon their trip entirely if they couldn't find a parking space in their intended location. Neither the retailers nor the customers stated they would travel to a different shopping centre outside the city centre.

The survey also gathered insights about retailers' perceptions of how frequently customer will visit the city centre if more space for everyone to enjoy and more options we available for them to easily get around. As shown in Figure D-29, most retailers who responded to the question believe customers will visit the city centre more frequently than they do now.

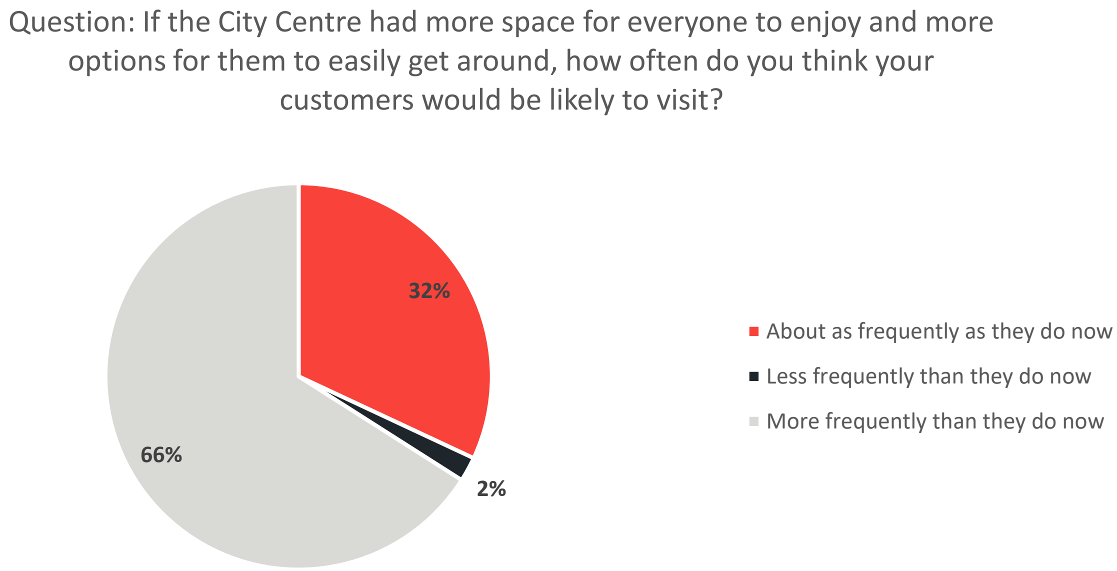


Figure D-29: Retailers' perceptions of how frequently customers would visit the city centre if more there was more space for everyone to enjoy and more options were available for them to easily get around (n=97).

Note: 'Not sure/don't know' not included in analysis.

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