gravitas

Research Report Prepared for

Auckland Transport

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Karangahape Road Streetscapes Enhancement

Pre-Works Survey of Local Businesses

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Table of Contents

Executive Summary

1. Research Objectives and Method

Auckland Transport and Auckland Council commissioned research to understand the perspectives of business owners in the Karangahape Road area on a number of issues relating to the physical environment and proposed streetscape enhancements planned. Perspectives on the impact of the proposed Streetscape Enhancements Project were sought, as well as unprompted suggestions for improvement to the area.

The results were obtained via an online and face-to-face survey of n=120 businesses in the area, conducted during June and July 2016.

2. Customer Activity

Most businesses surveyed experience the highest numbers of customers coming to their premises between midday and 5 pm. This applies to both weekdays and weekends. The median number of customers visiting businesses during their busiest time ranges from between 10 and 19 for non-retail, non-food and beverage businesses to between 50 and 99 for food and beverage outlets. *(Refer Section 3.2).*

Business owners perceive that the greatest share of their customers travel to the area by private vehicle on both a weekday (41%) and on a weekend (45%). Around a third come on foot. Customers park predominantly on nearby roads in the area (71% of businesses have customers parking here on weekdays, 73% on weekends), on Karangahape Road itself (61% weekdays, 74% weekends), or in a car park building (47% weekdays, 45% weekends). *(Refer Section 3.2)* Similarly, over half of business owners (52%) report that their staff travel to work by private vehicle, although most are able to park in carpark designated to the business. *(Refer Section 3.3).*

3. Perceptions of Karangahape Road

Business owners had chosen to locate in the Karangahape Road area primarily because of the 'feel' and atmosphere of the area (44%) and its proximity to the Central Business District (43%). Characteristics of the premises itself (amount of space, floor plan etc.) (34%) and foot traffic volumes (32%) had also been influential in the location decision. By comparison, a quarter (24%) had considered the availability of customer parking and 16% had considering parking for staff. *(Refer Section 3.1).*

These factors influencing the location decision are also the attributes business owners like about the current Karangahape Road area. Easy access to motorways is also identified as a positive feature of the area. *(Refer Section 4.1).* Business owners rate the area modestly for being as a safe and pleasant environment (5.3 out of 10 – notably lower than pedestrians at 6.2), being easy for customers to access (6.4), and being easy to cross the street (6.7 – similar to pedestrians at 6.6). *(Refer Section 4.2).* Businesses are generally positive about the future, more than half (56%) expecting their business activity to increase over the next 12 months. Only 10% anticipate a decrease *(Refer Section 4.3).*

4. Suggestions for Enhancement to The Karangahape Road Environment

Business owners made a range of (unprompted) suggestions with regard to how the Karangahape Road area could be made safer for pedestrians. These included measures to slow down traffic (18%), the introduction of dedicated cycle lanes (16%), and the installation of more pedestrian crossings (14%). *(Refer Section 5.1)*

To enhance the physical attractiveness of the area, business owners would like to see more plants (33%) and to have the area kept cleaner (24%). Also mentioned as enhancements were improvements to footpaths, including widening and allowing for more outdoor seating (14%). *(Refer Section 5.2)*

Business owners are in agreement that people walking should be given the highest priority on Karangahape Road, 73% saying they should be given high priority. However, half of businesses also feel that cars driving (51%) and cars parking (49%) should also be given high priority. By comparison, only 22% felt cycles should have high priority in the Karangahape Road area. *(Refer Section 5.3).*

Maintaining or increasing parking provision was the most frequently made suggestion for how Auckland Transport could help Karangahape Road businesses (mentioned by 42% of those who made a suggestion). Improving public transport (including train and bus stops) (23%) and making the area more pedestrian friendly (13%) were also commonly mentioned. *(Refer Section 5.4)*

5. Reaction to Proposed Streetscape Enhancements

The greatest share of business owners (56%) were positive about the introduction of dedicated cycle lanes, perceiving that they will be beneficial by making the area safer for cyclists and pedestrians. In contrast, 24% view the cycle lanes negatively, believing they will exacerbate the traffic problems and congestion already evident on Karangahape Road and won't have any tangible benefits for business as cyclists won't stop in the area. *(Refer Section 6.1)*

Parking and ease of access for customers are key concerns for Karangahape Road businesses, with 70% stating that having fewer on-street car parks will have a negative (25%) or very negative (45%) impact on their business, believing it will deter customers from visiting. Food and beverage business were particularly averse to the idea of removing on-street parking, 83% perceiving a negative impact. In contrast, only 7% felt the removal of on-street parking would be positive for their business, anticipating that it would make the street safer and therefore may encourage more visitors. *(Refer Section 6.2).*

Business owners suggest that the parking offered in the Karangahape Road area could be improved by building another carpark building, providing cheaper parking options (including free parking) and providing more short-stay parking (and enforcing the time limits on these). *(Refer Section 6.3).*

1 Introduction and Objectives

1.1 Introduction

Karangahape Road Streetscape Enhancements is a joint project between Auckland Transport and Auckland Council. The focus of the project is on retaining the street's unique character while supporting changes that will occur in the area as a result of the new train station being established as part of the City Rail Link.

The proposed enhancements aim to make it easier for visitors to move around the area comfortably and safely. Proposed changes include the creation of a separate cycle lane adjacent to the road, and upgrades to the footpath. As part of creating an attractive and user-friendly street, consideration is also being given to pedestrian crossings, traffic flow, trees and plantings, lighting, outdoor dining and art work.

1.2 Research Objectives

The aim of the research is to understand the perceptions of business owners in the Karangahape Road area with regard to the physical environment in which their businesses operate and also their perception of their customers' activity in terms of travel and parking.

The research also sought to assess the perspectives of business owners on the likely impact that an enhancement of the Karangahape Road environment would have, in particular the perceived impact of a dedicated cycle lane being introduced.

Specific areas addressed include:

- current customer behaviour – mode of transport, parking location, periods of peak customer activity;
- perceptions of pedestrian access and usability;
- perceptions of safety; and
- impact of improvements/enhancements, including impact of reduced on-street parking and the introduction of cycle lanes.

It is anticipated that the findings from the pre-works surveys will be used as input to the design process, providing Auckland Council and Auckland Transport with a better understanding of potential areas for enhancements in the Karangahape Road environment.

2 Methodology

2.1 Data Collection

The results presented in this report were gathered using a combination of online questionnaires, paper-based self-completion questionnaires, and face-to-face interviews. The survey questionnaire was designed by Gravitas in collaboration with Auckland Transport and the Auckland Council. A copy of the questionnaire is provided in the appendix.

Initially, an email invitation was sent out on behalf of the researchers by the Karangahape Road Business Association, including a link to the online survey questionnaire. The invitation to participate in the survey was distributed on 23rd May 2016 to 435 Karangahape Road Business Association members.

To encourage greater participation, in consultation with Auckland Transport, it was agreed that a team of six interviewers would visit as many Karangahape Road businesses in the study area as possible over a two-day period on the 28th and 29th June. (The study area is shown in Figure 2.1.) A total of 254 businesses in the study area were approached and of these, 234 were eligible to participate (that is, they had not already submitted a questionnaire) and given the opportunity to complete the survey in person, online or on a paper form.

Figure 2.1: Data Collection Area

A total of 120 responses to the survey were received. This is a response rate of 28%, based on the membership of the Karangahape Road Business Association being the total population. The maximum margin of error on a sample size of 120 is ± 7.6%[1] at the 95% confidence level.

Table 2.1: Number of Respondents by Completion Method

Questionnaire Completion Method	Number of Respondents	Share of Respondents
Online completion	71	59%
Face-to-face interviewer completion	44	37%
Paper based, mail back	5	4%

2.2 Profile of Businesses (Q25, Q26, Q27)

The following provides a profile of surveyed businesses by length of time located in the Karangahape Road area, business type and business size (number of employees).

Table 2.2: Length of Time Business Located in Karangahape Road Area

Questionnaire Completion Method	Number of Respondents	Share of Respondents
Less than a year	15	13%
Between one and five years	35	29%
Between six and ten years	15	13%
More than ten years	55	46%

Base N=120 (All respondents).

Table 2.3: Type of Business or Organisation

Questionnaire Completion Method	Number of Respondents	Share of Respondents
Retail	36	30%
Food and Beverage	31	26%
Professional Services	16	14%
Art/ Design	9	8%
Education	6	5%
Entertainment	4	3%
Accommodation	3	3%
Medical and Healing	3	3%
Electrical/ Electronics/ Engineering/ I.T.	2	2%
Church	2	2%
Community Service	2	2%
Other	6	5%

Base N=120 (All respondents).

[1] Adjusted using the finite population correction factor given the relatively small size of the population.

Table 2.4: Number of Staff Employed at Karangahape Road Location

Questionnaire Completion Method	Number of Respondents	Share of Respondents
1	6	5%
2 - 3	37	31%
4 - 5	30	25%
6 - 10	22	18%
11 - 19	11	9%
20 - 49	6	5%
50 - 99	6	5%
100 or more	2	2%

Base N=120 (All respondents).

Note: Includes part-time and casual staff.

2.3 Data Analysis

Thematic analysis was applied to open-ended comments by reading through them and grouping those that represented similar ideas. Selected comments have been used throughout the report as representative examples.

As part of the analysis undertaken, quantitative results have been cross-tabulated by the following variables:

Variable	Values
• Duration of business located in the Karangahape Road area	*Less than one year* *Between one and ten years* *Ten years or more*
• Type of business	*Retail* *Food and beverage* *All other businesses*
• Number of employees	*Between one and three* *Between four and ten* *More than ten*
• Busiest period on a weekday	*Before midday* *Midday to 5 pm* *After 5 pm* *No customers coming in*
• Number of customers during busiest weekday period	*Less than 20* *Between 20 and 50* *More than 50*
• Busiest period on a weekend	*Before midday* *Midday to 5 pm*

	After 5 pm *No customers coming in*
• Number of customers during busiest weekend period	*Less than 20* *Between 20 and 50* *More than 50*

Statistically significant differences in results by these demographic and behavioural characteristics have been highlighted in the text.

Note: When used in statistics, 'significant' does not mean 'important' or 'meaningful', as it does in everyday speech. Statistical significance is a statistical assessment of whether a result reflects a pattern (or in the case of this survey, a true increase or decrease) rather than being just chance – that is, if the questions were asked again of a different sample, would the same outcome (result) occur. In statistical testing, a result is deemed statistically significant if it is unlikely to have occurred by chance, and hence provides enough evidence to reject the hypothesis of 'no difference between sub-groups'.

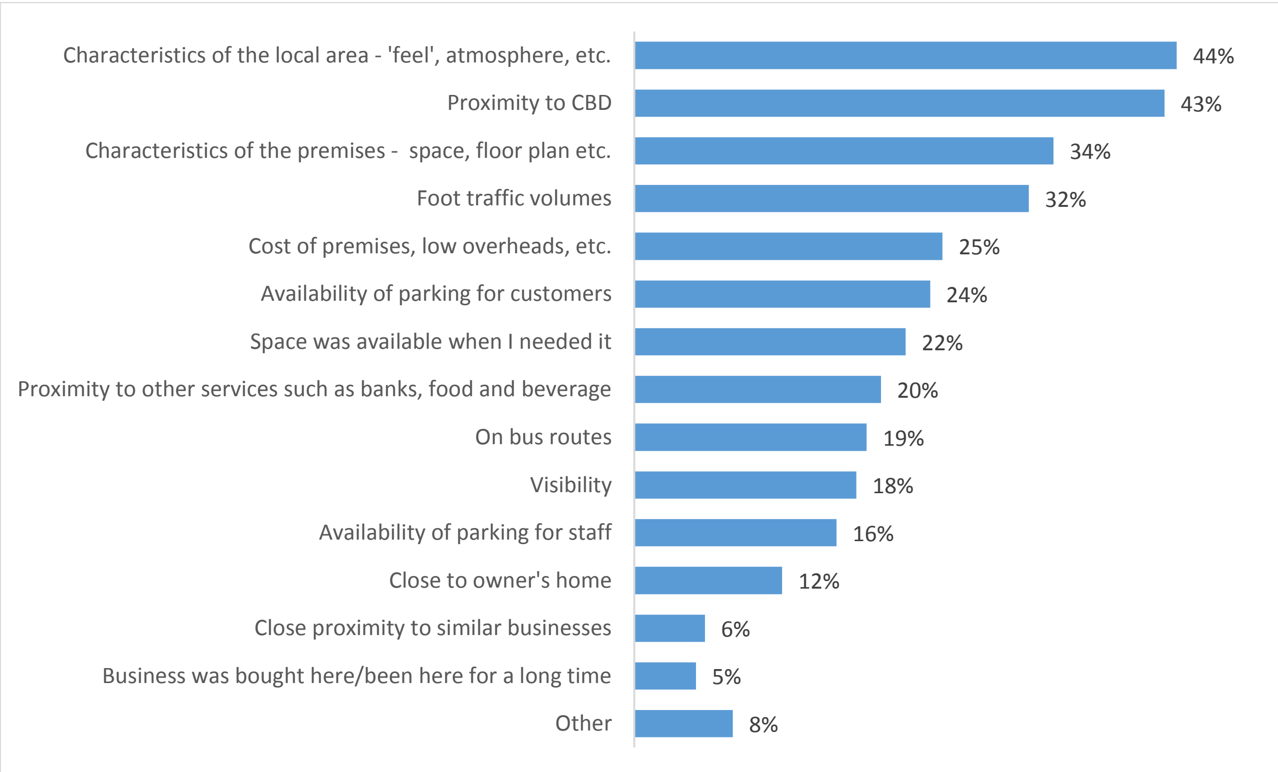
3 Current Situation

3.1 Factors in Business Location (Q1)

Business owners chose their location because of the characteristics of the local area and proximity to the CBD. A quarter chose the location due to the availability of parking for customers.

- The unique atmosphere and characteristics of the Karangahape Road area are key factors in businesses choosing to locate here. Nearly half (44%) of all respondents indicated that this was a factor when they were choosing a site for their business.
- Proximity to the CBD was a consideration for 43% of business owners, while 34% reported that the characteristics of the premises themselves were important them.
- Nearly one-third (32%) of business owners indicated that foot traffic volumes were a factor in their decision to locate their premises in the Karangahape Road area. Retail businesses were significantly more likely (47%) to indicate this as a factor.
- Cost of the premises was a consideration for one-quarter (25%) of businesses.
- The availability of parking for customers was indicated as a factor by 24% of respondents. Parking for staff was a consideration for 16% of businesses. Note that there were no significant differences between business types in terms of parking availability as a factor in choosing to locate in the Karangahape Road area.
- Approximately one in five (19%) business owners considered bus routes as a factor in their location.

Figure 3.1: Factors in Choosing Karangahape Road as Business Location



Base N=108 (All responses excluding 'Don't know'); Multiple responses allowed.

3.2 Customer Activity

Respondents were asked about a number of aspects of customer activity both on weekdays and on weekends. These aspects included time periods that had the most customer activity, number of customers coming into the premises, modes of transport used by customers, and parking of private vehicles.

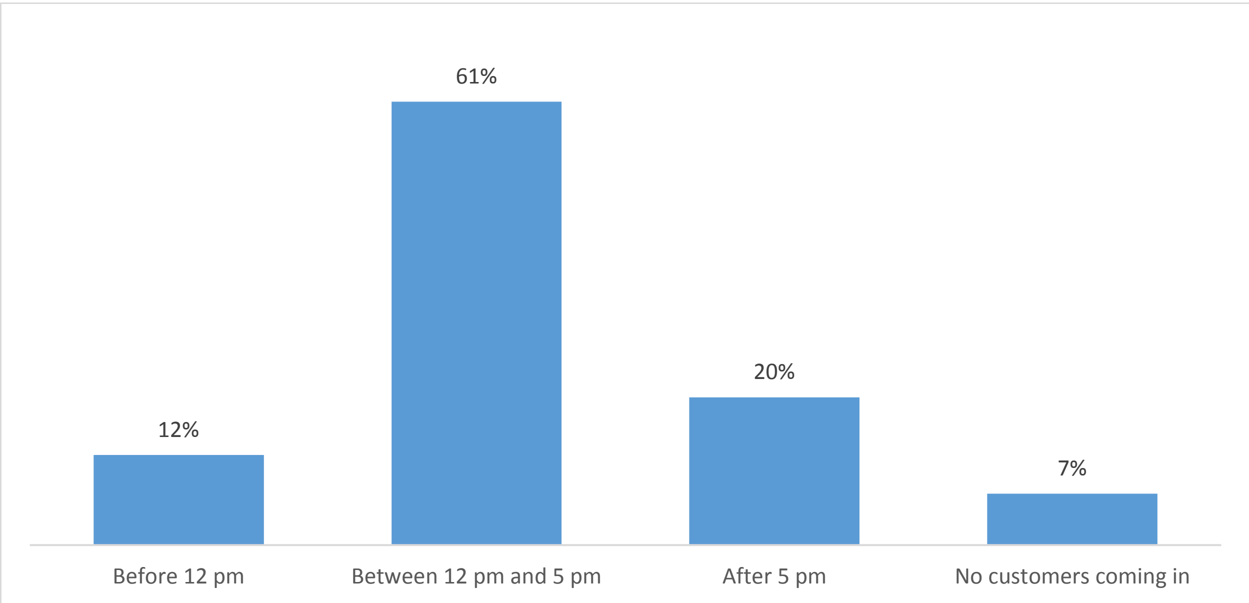
Weekday Customer Activity

Busiest Period on Weekdays (Q2)

Afternoons are the period when businesses have the most customers coming to their premises on a weekday.

- During weekdays, the afternoon (from midday to 5 pm) is the period during which most businesses (61%) experience the highest number of customer visits.
- Only 20% of respondents indicated that they have the most customers after 5 pm in the afternoon. *It should be noted however, that as the personal visits to businesses to encourage participation in the research were conducted between 9 am and 5 pm, businesses operating predominantly after 5 pm may have been under-sampled.*
- Food and beverage businesses were significantly more likely (39%) to indicate that they receive the most customers after 5 pm.
- Only 7% of those businesses surveyed indicated that they do not have customers coming to their premises at all on a weekday.

Figure 3.2: Period of Weekday with Most Customers Coming to Premises



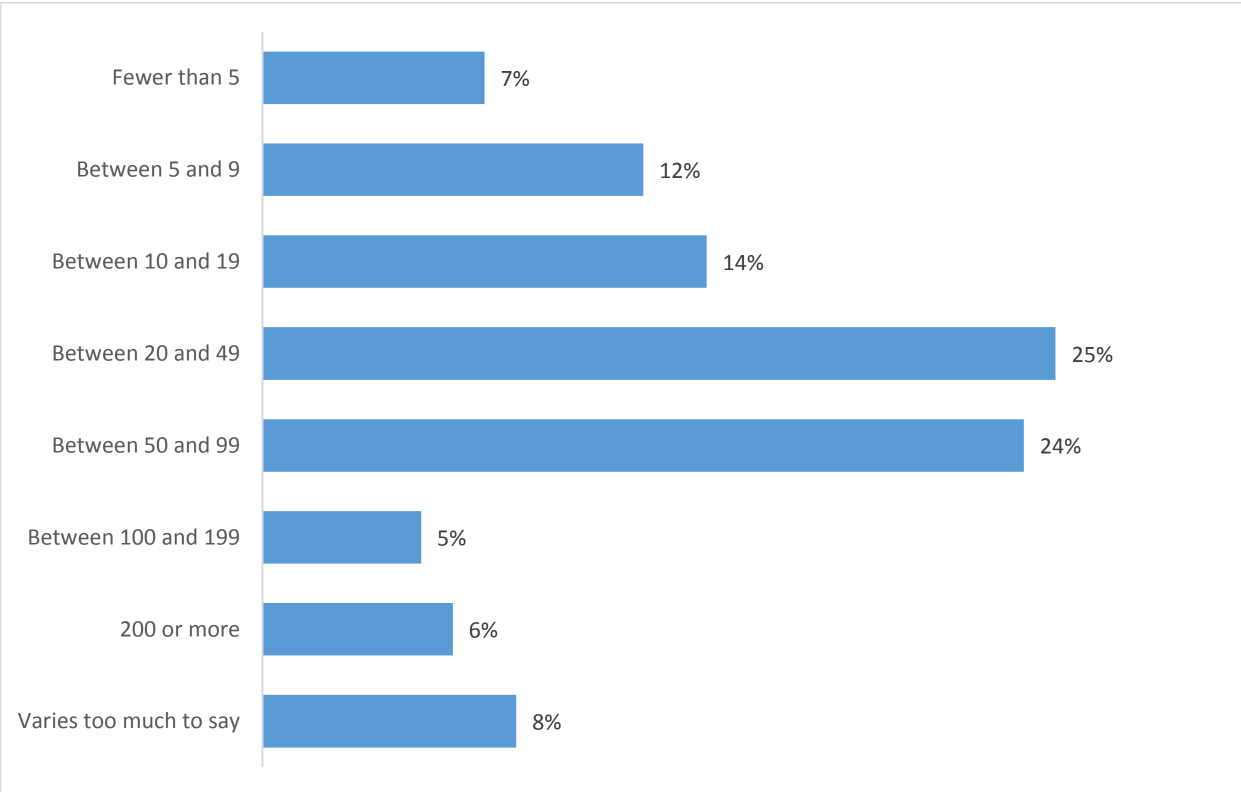
Base N=120 (All respondents).

Number of Customers on Weekdays (Q3)

Number of customers during busiest period on weekdays ranges from fewer than five to over 200.

- One-quarter (25%) of respondents estimated that they would have between 20 and 49 customers coming to their premises at their busiest period on a weekday. Retail businesses (36%) were significantly more likely than other business types to report customer numbers of between 20 and 49 during their busiest period on a weekday.
- A further quarter (24%) indicated that this would be between 50 and 99 customers. Food and beverage businesses (40%) were significantly more likely than other businesses to have between 50 and 99 customers during their busiest periods on a weekday.
- Eleven percent (11%) of businesses would have more than 100 customers during their busiest period and 6% would have more than 200 customers coming to their premises.
- Businesses that are neither retail nor food and beverage outlets were significantly more likely to indicate that they had fewer than ten customers (43%) coming into their premises during their busiest periods of a weekday.
- The median number of customers for food and beverage outlets, during their busiest period is between 50 and 99, while for retail businesses, the median number is between 20 and 49 customers. For all other businesses, the median is between 10 and 19 customers.

Figure 3.3: Number of Customers During Busiest Weekday Period



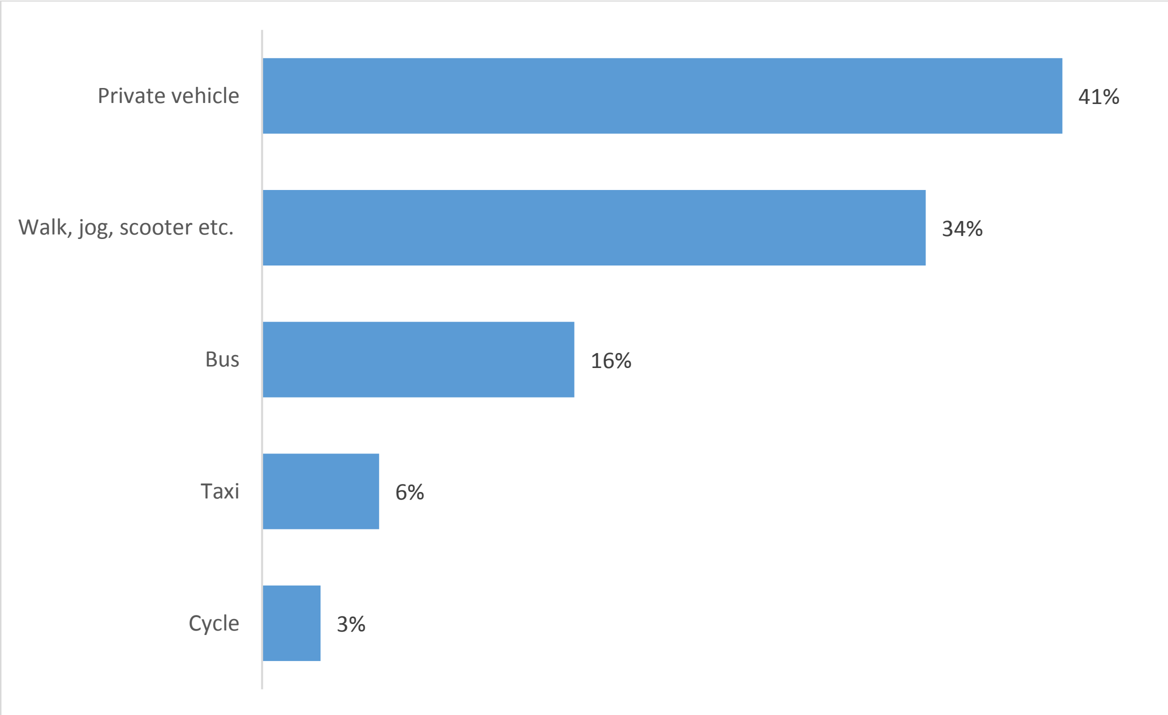
Base N=110 (All responses excluding 'Don't know' responses).

Modes of Transport Perceived to be Used on Weekdays (Q4)

More customers are perceived to come to the area by private vehicle than by any other modes of transport on a weekday.

- Slightly more than two in five customers (41%) are perceived to travel to businesses in the Karangahape Road area by private vehicle on weekdays. Businesses that have 20 or fewer customers coming in during their busiest periods on weekdays perceive a significantly higher proportion of their customers (61%) travelling by private vehicle.
- Business owners perceive that one-third of customers (34%) are pedestrians (including joggers and those on scooters or skateboards). Businesses that have been in the Karangahape Road area for one year or less perceive a higher proportion (60%) of their customers travelling to their premises on foot, compared with business that have been in the area longer.
- Business owners estimate that an average of one in six customers (16%) are using buses to travel to businesses in the area and that only 3% of customers travelling to businesses in the Karangahape Road area are using cycles as a mode of transport.

Figure 3.4: Mean Estimated Proportion of Customers by Mode of Transport Used on a Weekday



Base N=110 (All responses excluding 'Don't have customers coming in', Q2 and 'Don't know' responses).

Table 3.1: Mean Estimated Proportion of Customers by Mode of Transport on Weekdays (%)

	Private vehicle	Walk, jog, scooter etc.	Bus	Taxi	Cycle
By Number of Years in Area					
Less than one year *(N=14)*	18↓	60↑	19	3	1
Between one and ten years *(N=47)*	43	33	15	6	3
Ten years or more *(N=49)*	46	27	16	8	3
By Type of Business					
Retail *(N=36)*	38	42	16	2	2
Food and beverage *(N=31)*	32	43	13	8	3
Everything else *(N=43)*	50	20	19	8	3
By Number of Employees					
One to three *(N=40)*	33	48	14	3	2
Four to ten *(N=49)*	45	28	17	6	3
More than ten *(N=21)*	46	21	18	11	3

Base N=110 (All responses excluding 'Don't have customers coming in', Q2 and 'Don't know' responses).

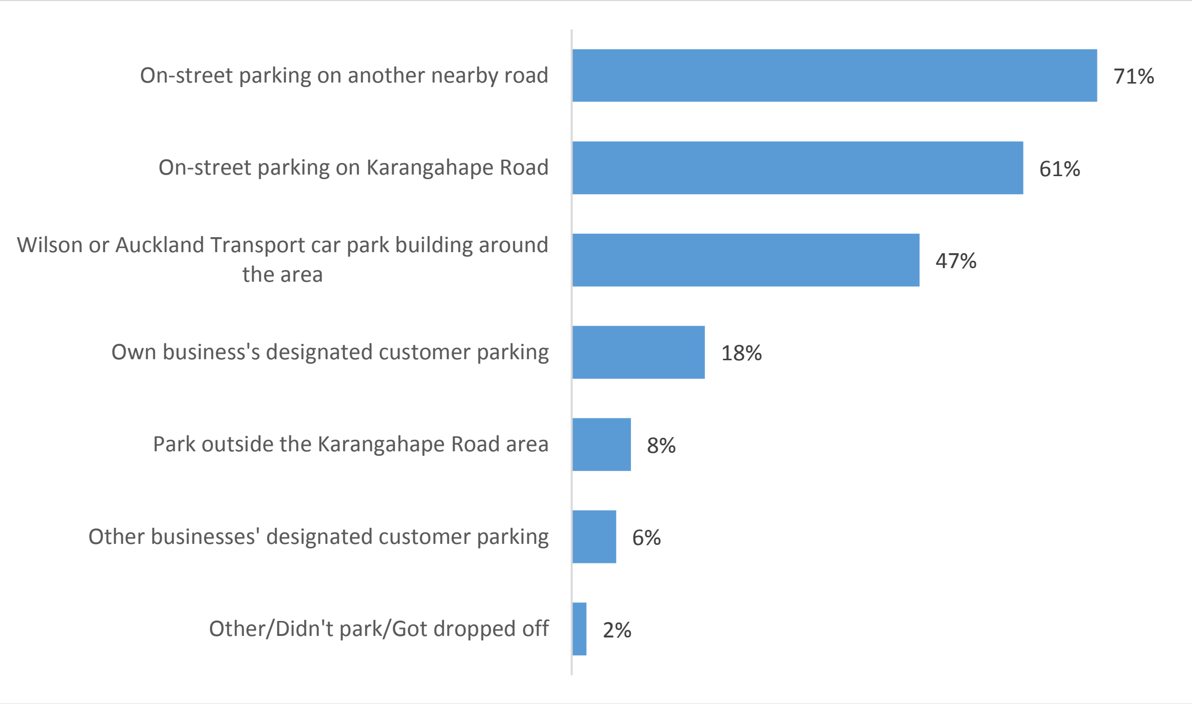
↑ denotes result statistically significantly higher than other modes. Note: Table uses row percentages.

Parking Perceived to be Used on Weekdays (Q5)

Most customers are perceived to use on-street parking, either on Karangahape Road or a nearby road, on a weekday.

- Nearly three-quarters of respondents (71%) perceived that their customers use on-street parking on roads nearby to Karangahape Road when they come in on weekdays.
- A further 61% perceived that their customers use parking on Karangahape Road.
- Nearly half of those who responded (47%) said that a car parking building in the area is used by their customers.
- Slightly less than one in five (18%) have designated customer parking available for their customers. Those that are neither retail nor food and beverage businesses (35%) are significantly more likely to have customers park in their own designated parking spaces. Six percent said that their customers utilise the designated parking spaces of other businesses.
- Eight percent of customers on weekdays are perceived by business owners to park outside the Karangahape Road area to access businesses.

Figure. 3.5: Business Owner Perceptions of Parking Options Used by Customers on a Weekday



Base N=89 All respondents (Respondents who have customers travelling by private vehicle, Q4; excluding 'Don't know' responses). Multiple responses allowed.

Table 3.2: Business Owner Perceptions of Parking Options Used by Customers on a Weekday (%)

	On-street parking on Nearby Road	On-street Parking on K' Rd	Carpark Building in Area	Business's Own Designated Parking	Park Outside K' Rd Area	Another Business's Designated Parking	Other/ Didn't Park/ Got Dropped Off
By Number of Years in Area							
Less than one year *(N=7)*	57	57	43	0	29	0	0
Between one and ten years *(N=44)*	73	68	43	14	9	5	0
Ten years or more *(N=38)*	71	53	53	26	3	8	6
By Type of Business							
Retail *(N=28)*	64	82	50	7	4	0	8
Food and Beverage *(N=24)*	88	46	54	4	13	13	0
Everything Else *(N=37)*	65	54	41	35↑	8	5	0
By Number of Employees							
One to three *(N=29)*	69	72	45	3	10	0	0
Four to ten *(N=42)*	74	52	50	19	7	10	-
More than ten *(N=18)*	67	61	44	39	6	6	12

Base N=89 All respondents (respondents who have customers travelling by private vehicle, Q2; excluding 'Don't know' responses). Multiple responses allowed

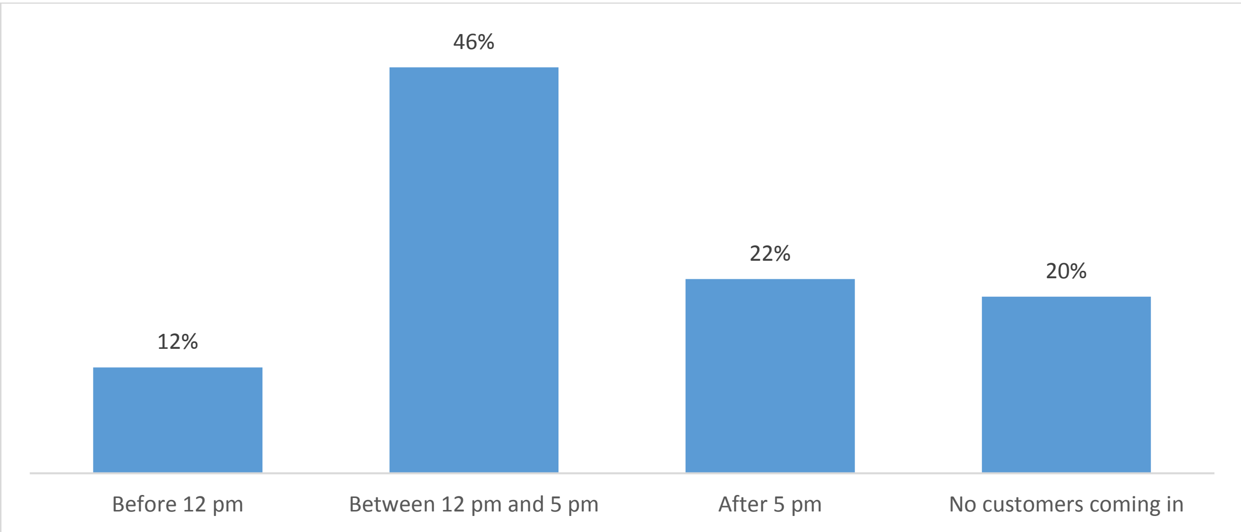
Weekend Customer Activity

Busiest Period on Weekends (Q6)

Afternoons are the busiest periods for businesses on a weekend.

- Almost half (46%) of respondents indicated that between 12 pm and 5 pm was their busiest time for customers on a Saturday or Sunday. Retail businesses (67%) were significantly more likely than other types of business to be busiest in the afternoon on weekends.
- In contrast, food and beverage businesses (48%) were significantly more likely than other businesses to have most customers coming to their premises after 5 pm on a weekend.
- One-fifth (20%) of businesses do not have customers coming into their premises at all on a weekend.

Figure 3.6: Periods During Weekends When Most Customers Coming in to Business



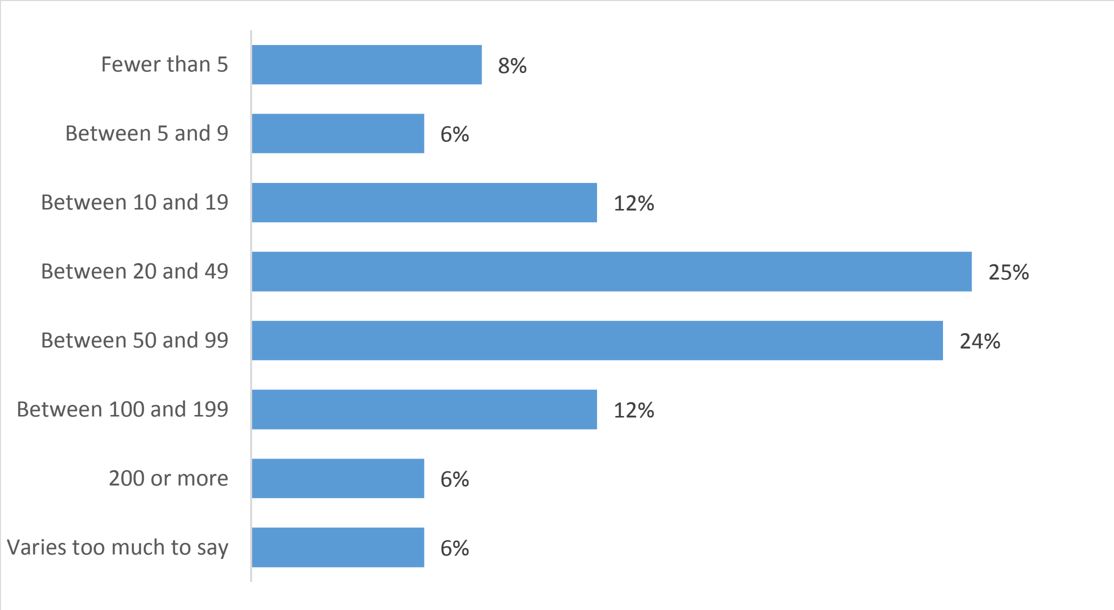
Base N=110 (All respondents, excluding 'Don't know' responses).

Customer Numbers on Weekends (Q7)

Afternoons are the period when businesses have the most customers coming to their premises on a weekend.

- The pattern of customer activity on weekends is very similar to that of weekdays, with the greatest share of businesses having between 20 and 49 customers (25%) or between 50 and 99 customers (24%) at their busiest periods of the weekend.
- Eighteen percent of businesses have over 100 customers during their busiest period, with 6% having more than 200 people.
- Businesses that were neither retail nor food and beverage outlets were significantly more likely (63%) to have fewer than 20 customers at their busiest times over the weekend.
- The median number of customers for retail businesses and food and beverage outlets, during the period in which they have the most customers on a weekend, is between 50 and 99, while for all other businesses, the median is between 10 and 19 customers.

Figure 3.7: Number of Customers During Busiest Weekend Period



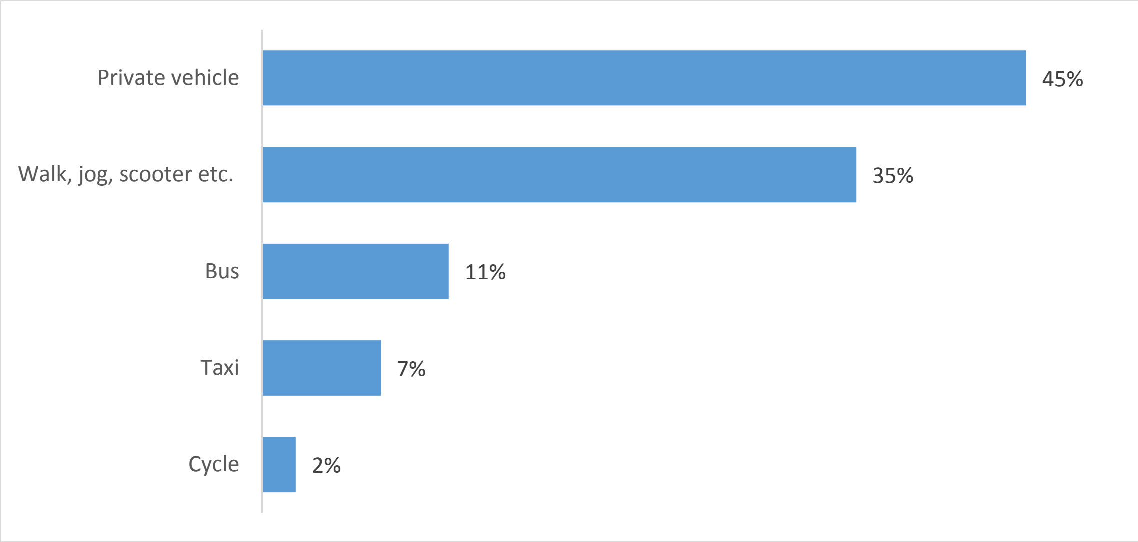
Base N=95 (All responses excluding 'Don't have customers coming in', Q6 and 'Don't know' responses).

Modes of Transport Perceived to be Used on Weekends (Q8)

More customers are perceived by business owners to come to the area by private vehicle than by any other mode of transport on a weekend.

- Proportions of customers perceived by business owners to be using various modes of transport on weekends showed a similar pattern to those perceived to be used by customers on weekdays.
- Private vehicle was perceived by business owners as the most commonly used mode of transport (45%; compared with 41% of weekdays).
- Business owners estimate that slightly more than one-third (35%) of their customers either walk, jog or use a scooter/skateboard to travel to their premises on a weekend. This is consistent with 34% on weekdays.
- An average of eleven percent of customers are perceived to travel by bus, while 7% are perceived to use taxis to travel to businesses in the Karangahape Road area on weekends.
- The share of customers estimated by business owners to use cycles on weekends is 2%.

Figure 3.8: Mean Estimated Proportion of Customers by Mode of Transport Used on a Weekend



Base N=96 (All responses excluding 'Don't have customers coming in', Q6 and 'Don't know' responses).

Table 3.3: Mean Estimated Proportion of Customers by Mode of Transport on Weekends (%)

	Private vehicle	Walk, jog, scooter etc.	Bus	Taxi	Cycle
By Number of Years in Area					
Less than one year *(N=12)*	26	56	14	3	1
Between one and ten years *(N=43)*	43	35	12	7	3
Ten years or more *(N=41)*	52	28	9	8	2
By Type of Business					
Retail *(N=34)*	43	41	11	3	2
Food and Beverage *(N=29)*	35	40	11	11	2
Everything Else *(N=33)*	54	24	10	8	3
By Number of Employees					
One to three *(N=36)*	40	42	11	4	3
Four to ten *(N=44)*	47	32	12	6	3
More than ten *(N=16)*	49	27	6	16	1

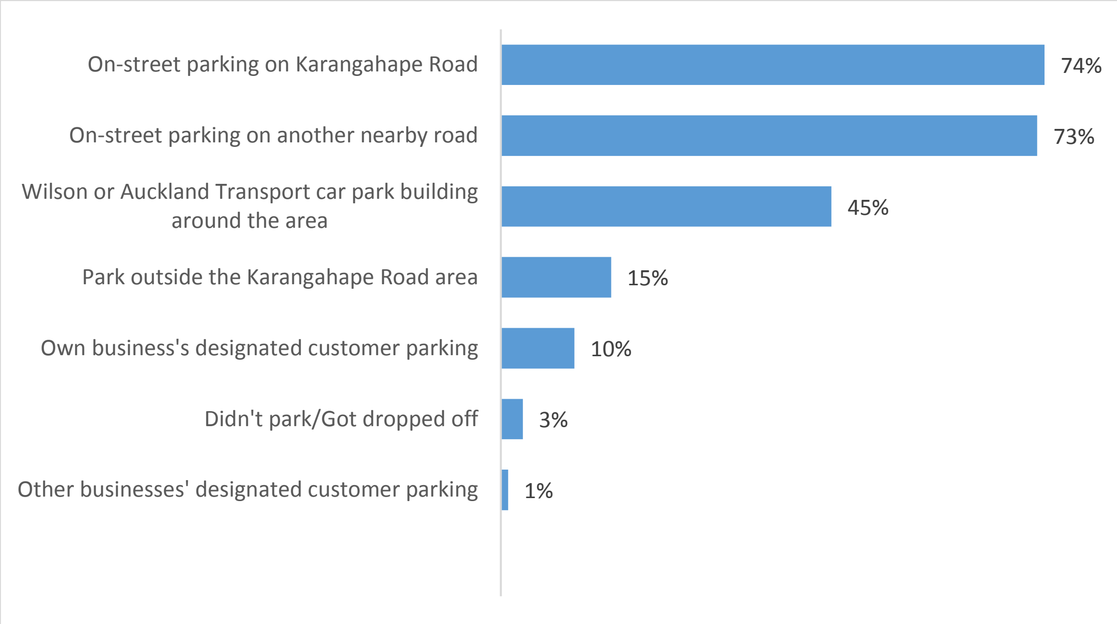
Base N=96 (All responses excluding 'Don't have customers coming in', Q6 and 'Don't know' responses).

Parking on Weekends (Q9)

On weekends, customers are perceived to use on-street parking most commonly, either on Karangahape Road or a nearby road.

- The proportion of customers who are perceived to park on Karangahape Road on weekends (74%) is higher than on weekdays (61%), while the proportion who are perceived to park on nearby streets (73%) is similar to that on weekdays (71%).
- Business owners perceive that nearly half of customers (45%) visiting businesses in the Karangahape Road area on weekends use a car parking building and 15% park outside the area.
- One in ten customers (10%) use businesses' designated parking on a weekend.

Figure 3.9: Business Owners Perceptions of Parking Options Used by Customers on a Weekend



Base N=78 (Respondents who have customers travelling by private vehicle, Q8; excluding 'Don't know' responses). Multiple responses allowed.

Table 3.4: Business Owner Perceptions of Parking Options Used by Customers on a Weekend (%)

	Business's Own Designated Parking	Another Business's Designated Parking	On-street Parking on K' Rd	On-street parking on Nearby Road	Carpark Building in Area	Park Outside K' Rd Area	Other/Didn't Park/ Got Dropped Off
By Number of Years in Area							
Less than one year *(N=7)*	0	0	100	86	43	14	0
Between one and ten years *(N=37)*	5	0	78	76	43	19	0
Ten years or more *(N=34)*	18	3	65	68	47	12	9
By Type of Business							
Retail *(N=27)*	7	4	85	74	44	11	1
Food and Beverage *(N=24)*	0	0	71	83	54	21	1
Everything Else *(N=27)*	22	0	67	63	37	15	1
By Number of Employees							
One to three *(N=29)*	3	0	83	79	31	14	0
Four to ten *(N=36)*	11	3	67	72	53	19	6
More than ten *(N=13)*	23	0	77	62	54	8	0

Base N=78 (Respondents who have customers travelling by private vehicle, Q6; excluding 'Don't know' responses). Multiple responses allowed.

Comparison of Transport Modes with Data from Pedestrian Intercept Survey

Gravitas conducted an intercept survey of pedestrians on Karangahape Road as part of the Auckland Transport and Auckland Council's wider Streetscape Enhancement pre-works data collection project. Respondents to this survey were approached on Karangahape Road by members of Gravitas' interviewing team and invited to participate by completing a questionnaire.

One aspect of the survey asked respondents about the mode of transport they had used to get to Karangahape Road on the day of the interview.

Note: Although comparisons can be made between modes of transport that pedestrians on Karangahape Road reported using and those that business owners perceived their customers using, it is important to note that there are limitations to doing so. Firstly, the method of data collection differed between the two surveys, with the former being targeted at all pedestrians, regardless of whether they were business customers or not. Secondly, the pedestrian intercept survey was conducted during normal business hours (9 am – 5 pm), while some businesses in the Karangahape Road area are open beyond these times and therefore, customers of these businesses may have been under-sampled.

Mode of Transport Comparison by Weekday and Weekend

- Business owners were significantly more likely to perceive that their customers travel by private vehicle both on weekdays (41%) and weekends (45%), compared with the mode of travel reported by respondents to the pedestrian intercept survey on weekdays (17%) and weekends (18%).
- Respondents to the pedestrian intercept survey were significantly more likely to say they had either walked or jogged to the area (57% on weekdays, 59% on weekends), compared with proportions perceived by business owners for customers' travel mode on weekdays (34%) and weekends (35%).

Table 3.5: Modes of Transport Comparison of Surveys

Mode of Transport	Business Survey (Weekday)	Business Survey (Weekend)	Pedestrian Intercept Survey (Weekday)	Pedestrian Intercept Survey (Weekend)
Private vehicle	41%↑	45%↑	17%↓	18%↓
Walking, jogging, scooter etc.	34%↓	35%↓	57%↑	59%↑
Bus	16%	11%	22%	17%
Taxi/Other	6%↑	7%↑	1%↓	2%↓
Cycle	3%	2%	2%	4%

Pedestrian Intercept Survey Base N=620; Business Survey N=110 (All respondents, excluding 'Don't know' responses).
↑ denotes result statistically significantly higher; ↓ denotes result statistically significantly lower. Note: Table uses column percentages.

Mode of Transport Comparison by Reason for Visit

- Owners of retail businesses were significantly more likely to perceive that their customers use private vehicles as one mode of travelling to Karangahape Road (41%) than the share of pedestrians who were visiting Karangahape Road for shopping (22% reporting travelling by private vehicle on the day of the interview). In contrast, shoppers were more likely to report having got to the area on foot (55%) than retail business owners perceive travel by foot (42%).

- The differences between business owner perceptions and pedestrian actions was even more notable among food and beverage businesses. Owners of food and beverage businesses were significantly more likely to perceive their customers using private vehicles to travel to Karangahape Road (33%) than the share of pedestrians who were visiting restaurants, bars or fast food outlets on the day of the interview (16%). Diners interviewed were significantly more likely to report having travelled to the area on foot (67%) than food and beverage business owners perceive (42%).

Table 3.6: Modes of Transport Comparison of Surveys, by Reason for Visit

	Retail		Food and Beverage	
Mode of Transport	Business Survey (Retail Business)	Pedestrian Intercept Survey (Visiting for Shopping)	Business Survey (Food and beverage business)	Pedestrian Intercept Survey (Visiting restaurants, bars or fast food)
Private vehicle	41%↑	22%↓	33%↑	16%↓
Walking, jogging, scooter etc.	42%↓	55%↑	42%↓	67%↑
Bus	13%	15%	12%	11%
Taxi/Other	2%	2%	10%	1%
Cycle	2%	5%	3%	4%

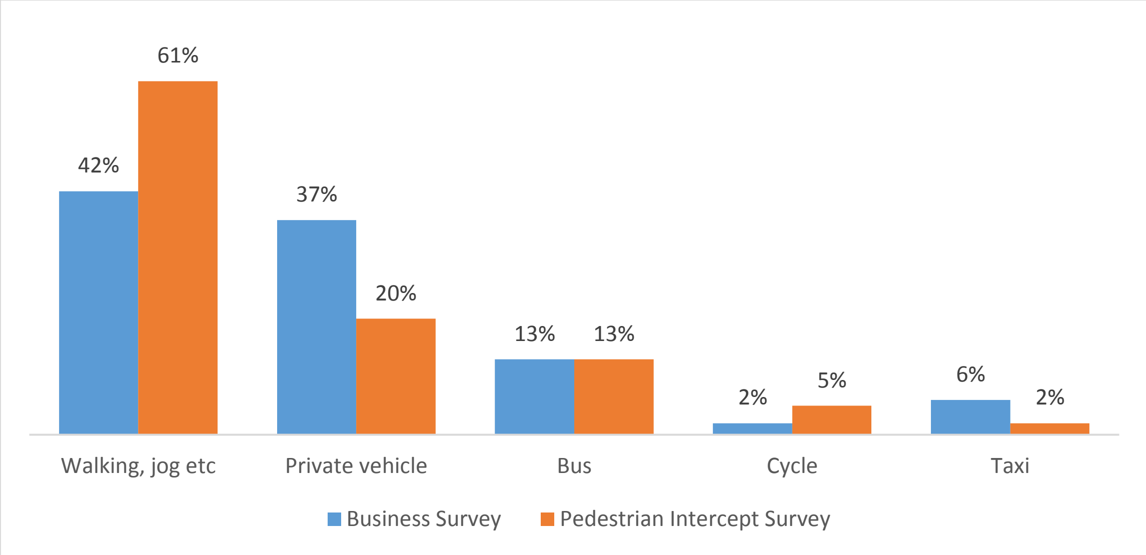
Base: Pedestrian Intercept Survey N=620; Business Survey N=110 (All respondents, excluding; don't know' responses).
↑ denotes result statistically significantly higher; ↓ denotes result statistically significantly lower. Note: Table uses column percentages.

Mode of Transport Comparison for Retail/Shopping and Restaurants/Food & Beverage

Owners of retail businesses and restaurants/cafes perceive that their customers use private vehicles in greater proportions and come to the area on foot in smaller proportions than those reported in the Pedestrian Intercept Survey.

- Retail and food and beverage business owners estimate that around two in four customers (42%) come to the area on foot, while around three in five (61%) of those interviewed in the Pedestrian Intercept Survey who had visited the area for shopping or to access restaurants/cafes reported having come on foot.
- Retail and food and beverage business owners perceive that 37% of their customers travel to the Karangahape Road area by private vehicle. However, in the Pedestrian Survey only 20% reported having used a private vehicle to get to the area on the day they were interviewed.

Figure 3.10 Modes of Transport Used by Customers of Retail Shops and Restaurants/Cafes Perceived vs Actual Mode Use



Base: Business Survey N=110 (All respondents excluding 'Don't know' responses Q5 and Q9). Pedestrian Intercept Survey N=620.

Note: The data displayed in Figure 3.10 are from two separate surveys and are not directly comparable. This data should be interpreted with caution.

Comparison of Parking Locations with Data from Pedestrian Intercept Survey

Parking Location Comparisons

Note: Although comparisons can be made between parking locations that businesses perceived their customers use and where pedestrians reported having parked on the day of the interview, it is important to note that business owners were asked to identify as many parking options that they were aware their customers use if they travel to Karangahape Road, while respondents to the Pedestrian Intercept Survey were asked where they had parked on the day of their interview if they had travelled to the Karangahape Road area by private vehicle. Consequently, comparisons should be interpreted with caution.

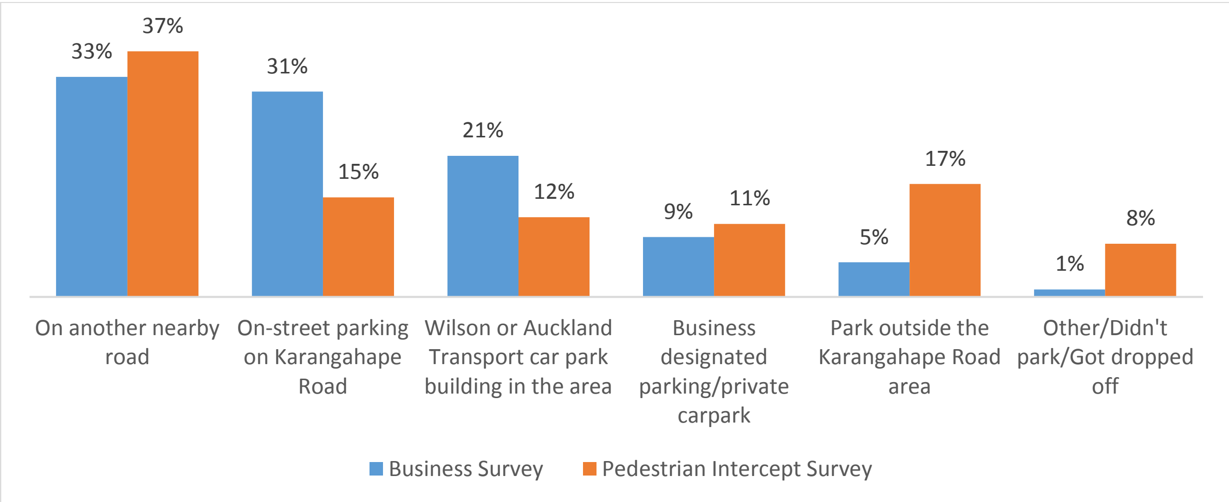
- Approximately three-quarters (74%) of business owners perceived that at least some of their customers use on-street car parking on Karangahape Road on the weekends and 61% perceived this to be the case on weekdays. In contrast, 28% of those who responded to the Pedestrian Intercept Survey on a weekend had parked on Karangahape Road that day, and 9% of those who responded on a weekday had parked on Karangahape Road.
- Around seven in ten respondents to the business survey perceived customers using on-street carparks on nearby roads on weekdays (71%) and weekends (73%), while 36% of respondents who were interviewed in the Pedestrian Intercept Survey on a weekday had parked on a nearby road and 28% of those interviewed on a weekend had parked on a nearby road.
- Around half of business owners said that they were aware of customers using car parking buildings on a weekday (47%) and on a weekend (45%), while 13% and 9%, respectively, had parked in car parking buildings on the day of their visit to the area.

Proportions of Parking Options Used by Shoppers and Restaurant Visitors

The graph below (Figure 3.11) shows the proportions of each parking option as a percentage of all of the parking options that retail and food/beverage business owners are aware that their customers use. This has been compared with the parking options actually used by those who came to Karangahape Road by private vehicle to shop or visit a restaurant/café on the day they were interviewed.

- Retail and food and beverage business owners perceive that parking on Karangahape Road constitutes 31% of overall customer parking behaviour. However, only 15% of pedestrians interviewed who had travelled to the area by private vehicle to shop or visit restaurants/cafes reported having parked on Karangahape Road.
- Owners of retail and food and beverage businesses perceive that customers parking in a car parking building in the area constitute 21% of the parking options used by their customers. However, of pedestrian customers who had travelled to the Karangahape Road area by private vehicle, only 12% had parked in a car parking building on the day they were interviewed.
- Retail and food and beverage business owners perceive that parking outside the Karangahape Road area constitutes only 5% of their customers' parking behaviour. However, of pedestrian customers who had travelled by private vehicle, 17% had parked outside the area on the day they were interviewed.

Figure 3.11 Parking Options of Retail/Shopping and Restaurants/Food & Beverage Customers Perceived vs Actual Used



Base: Business Survey N=89 (Respondents who had customers travel to the area by private vehicle, Q4 and Q8; excluding 'Don't know' responses); multiple responses allowed. Pedestrian Intercept Survey N=99 (Respondents who travelled to the area by private vehicle on the day of interview, Q1; excluding 'Don't know' responses).

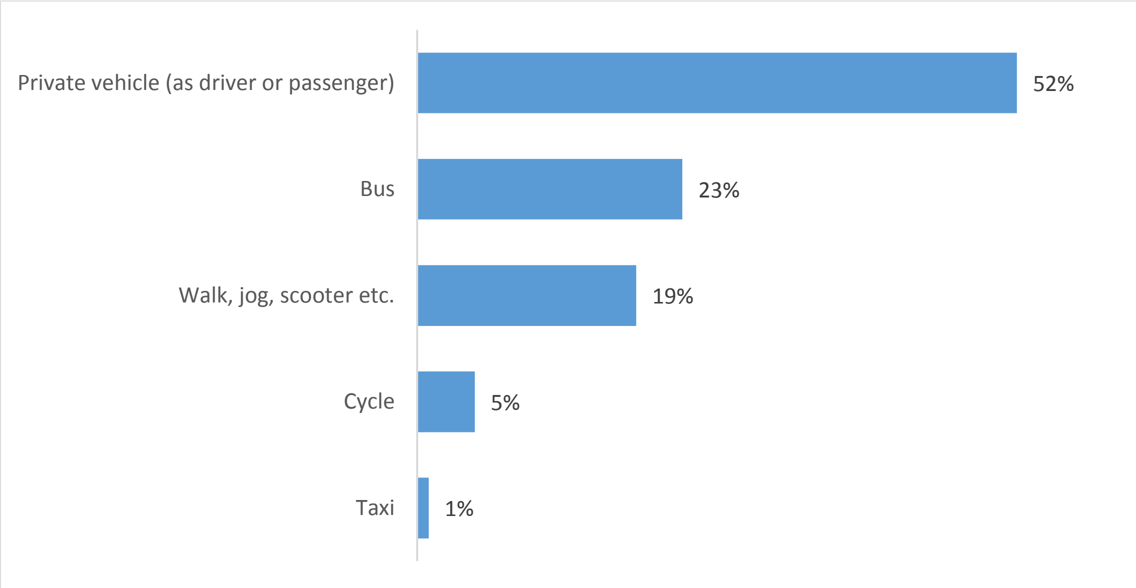
Note: The data displayed in Figure 3.11 are from two separate surveys and are not directly comparable. This data should be interpreted with caution.

3.3 Staff Transport and Parking

Mode of Transport Used by Staff (Q28)

- On average, business owners perceived that around 52% of staff use private vehicles to travel to work.
- On average just less than one-quarter of staff (23%) travel to work by bus whilst 19% come on foot.
- On average, only 5% of staff across businesses cycle to work.

Figure 3.12: Mode of Transport Staff Use to Travel to Work



Base N=120 (All respondents).

Table 3.7: Mean Proportion of Staff by Mode of Transport to Work (%)

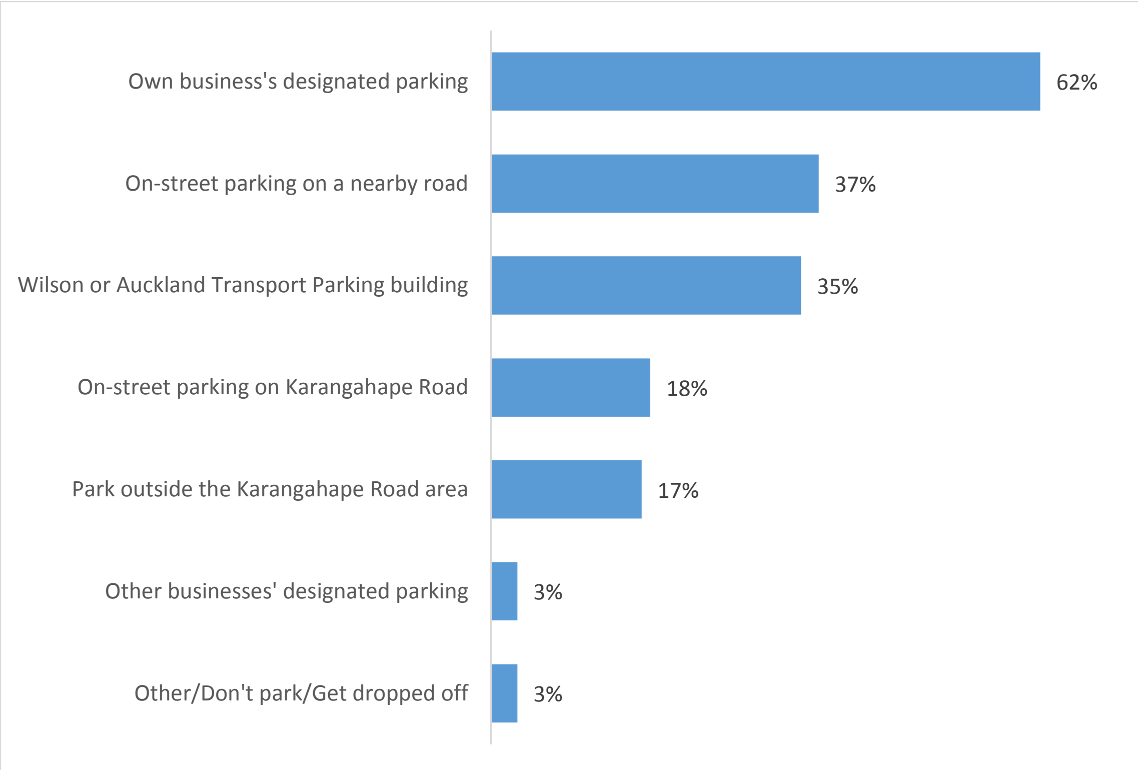
	Private vehicle	Walk, jog, scooter etc.	Bus	Taxi	Cycle
By Number of Years in Area					
Less than one year *(N=15)*	63	12	23	1	0
Between one and ten years *(N=50)*	46	24	23	1	6
Ten years or more *(N=55)*	54	17	24	0	4
By Type of Business					
Retail *(N=36)*	55	19	24	0	3
Food and Beverage *(N=31)*	39	31	24	1	5
Everything Else *(N=53)*	57	13	23	0	5
By Number of Employees					
One to three *(N=43)*	54	23	20	0	3
Four to ten *(N=52)*	49	19	25	1	7
More than ten *(N=25)*	54	13	23	0	4

Base N=120 (All respondents).

Parking Options Used by Staff (Q29)

- Almost two-thirds (62%) of staff who travel to work in the Karangahape Road area park in a car park that is designated to the business at which they are employed. Businesses that have been located in the area for ten years or more (74%) were significantly more likely to have staff parking in their own business's designated parking spaces. Businesses that were neither retail nor food and beverage outlets (72%) were significantly more likely to have parking available for their employees.
- Thirty-seven percent of those who come to work in the area by private vehicle use on-street parking on a nearby road.
- Thirty-five percent park in either the Wilson or Auckland Transport Parking building. Businesses with fewer than four employees (10%) are significantly less likely to have a staff member who uses a car parking building when coming to the area for work.
- Eighteen percent of employees of businesses in the area use on-street parking on Karangahape Road.

Figure 3.13: Staff Parking Locations



Base N=98 (All respondents, excluding 0% Private vehicle Q28 and 'Don't know' responses).
Multiple responses allowed.

Table 3.8: Staff Parking Locations (%)

	Business's Own Designated Parking	Another Business's Designated Parking	On-street Parking on K' Rd	On-street parking on Nearby Road	Carpark Building in Area	Park Outside K' Rd Area	Other/Didn't Park/ Got Dropped Off
By Number of Years in Area							
Less than one year *(N=14)*	36	0	29	29	36	21	7
Between one and ten years *(N=37)*	57	5	16	41	32	11	3
Ten years or more *(N=47)*	74↑	2	17	36	36	21	2
By Type of Business							
Retail *(N=28)*	64	7	7	21	36	11	0
Food and Beverage *(N=23)*	39	0	39	61	35	22	0
Everything Else *(N=47)*	72↑	2	15	34	34	19	4
By Number of Employees							
One to three *(N=30)*	63	7	13	23	10↓	7	3
Four to ten *(N=43)*	56	0	26	49	40	14	2
More than ten *(N=34)*	72	4	12	32	56	36	0

Base N=98 All respondents (Respondents who have staff travelling by private vehicle, Q28; excluding 'Don't know' responses). Multiple responses allowed.

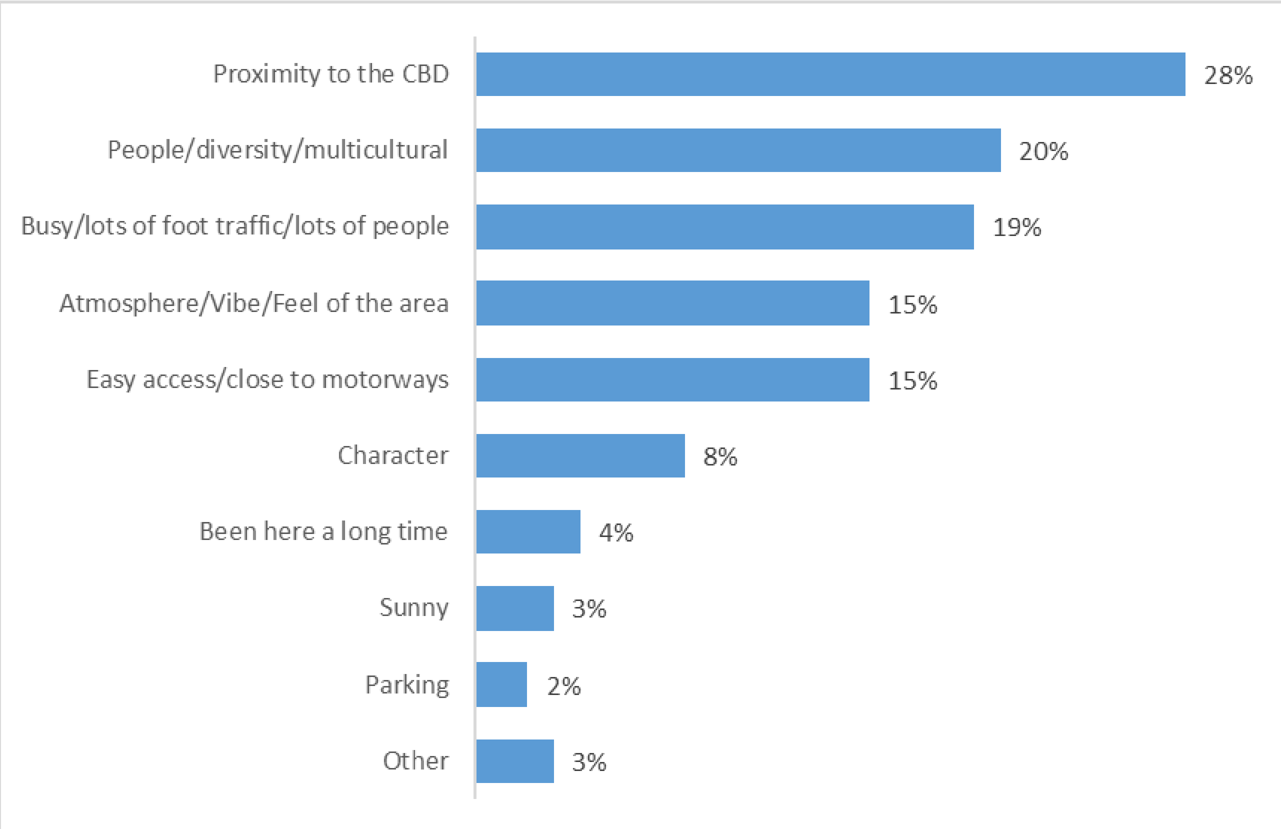
4 Perceptions of Karangahape Road

4.1 What Business Owners Like About Karangahape Road (Q11)

Business owners like the proximity to the CBD, the diversity of the people in the area and that there are high volumes of foot traffic.

- Around one in three business owners (28%) reported (unprompted) that the proximity of their premises to the Central Business District was what they most liked about their location.
- One in five respondents (20%) indicated that the people who frequent the area, including the diversity and multicultural nature of the area, are factors that they like about Karangahape Road.
- A similar proportion, 19% said that the fact that the area is busy, with high volumes of foot traffic, was a positive aspect of Karangahape Road.
- The atmosphere/vibe/feel of the area (15%) and the ease of access to the motorway (15%) were also frequently mentioned.

Figure 4.1: Positive Aspects of Karangahape Road Location



Base N=98 (All responses excluding 'Don't know'); Multiple responses allowed.

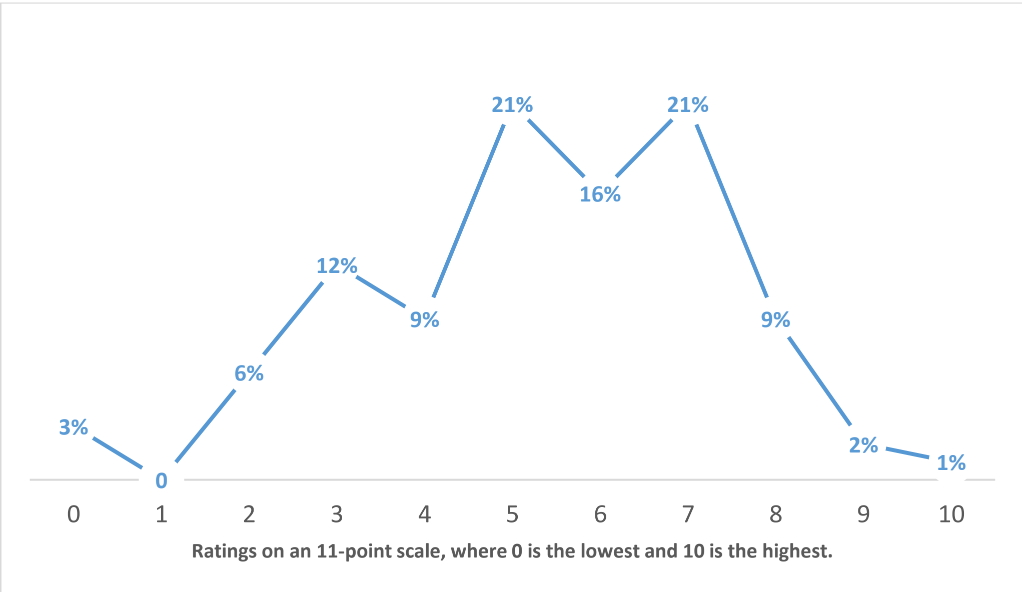
4.2 Business Owner Perceptions of Karangahape Road (Q13)

Safe and Pleasant Environment

Business owners perceive Karangahape Road to be a moderately safe and pleasant environment.

- The greatest share of business owners (58%) rated the safety and pleasantness of the Karangahape Road environment in the mid-range, with either a rating score of 5, 6 or 7 (on an 11-point scale, where 0 is the lowest and 10 is the highest).
- Thirteen percent rated the safety and pleasantness of the environment between 8 and 10. Businesses with 50 or more customers during their busiest periods (21%) were significantly more likely to rate the safety and pleasantness of the environment with a score of '8' or above, compared with other businesses (8%).
- However, almost one in three (30%) rated the safety and pleasantness poorly (0-4).
- Businesses that had been located in the area for ten years or more were significantly more likely to rate the safety and pleasantness of the environment at the extremes, with 8% rating it '0' and 6% rating it '10'.
- The mean rating for the street being safe and pleasant is 5.3 (where 10 equates with all respondents giving a rating of 'excellent').
- By comparison, respondents to the Pedestrian Intercept Survey rated Karangahape Road more positively for the safety and pleasantness of the environment, with a mean score of 6.2, compared with a mean rating score of 5.3 for respondents to the Business Survey. Only 17% of pedestrians gave a rating of 0-4 compared with 30% of businesses.

Figure 4.2: Ratings for Safety and Pleasantness of Environment



Base N=120 (All respondents).

Table 4.1: Ratings for Karangahape Road Being a Safe and Pleasant Environment (%)

	Share of Respondents Business Survey	Share of Respondents Pedestrian Intercept Survey
Share rating 0 to 4	**30**	**17**
Share rating 5 to 7	**58**	**58**
Share rating 8 to 10	**13**	**25**
Mean rating (out of 10)	**5.3**	**6.2**

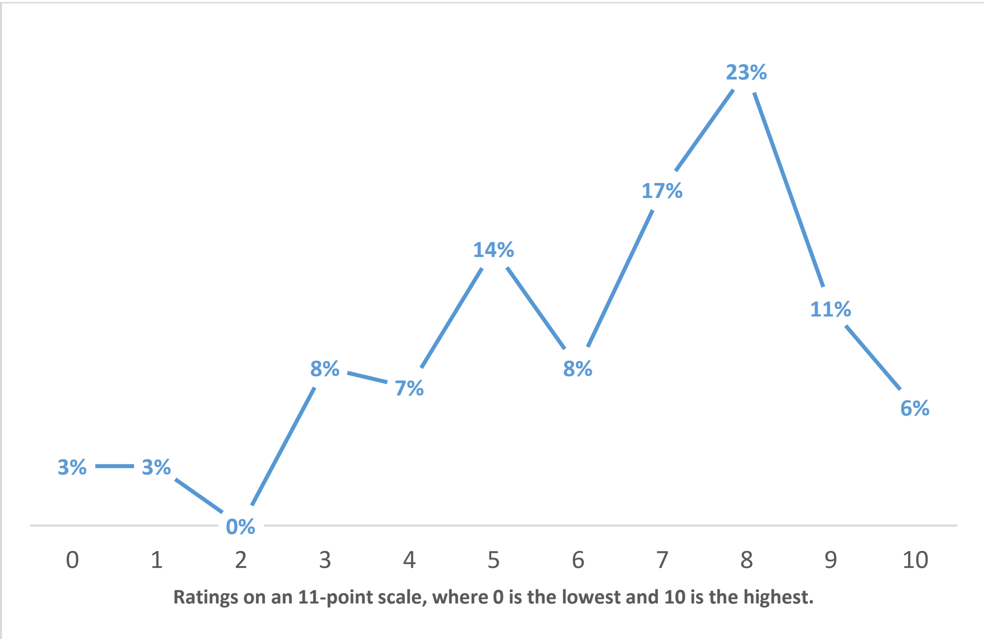
Base Business Survey N=120; Pedestrian Intercept Survey N=614 (All respondents, excluding 'Don't know' responses.
Ratings on an 11-point scale, where is the lowest and 10 is the highest.

Easy for Customers to Access

Business owners perceive Karangahape Road to be a reasonably easy area for customers to access.

- Two in five business owners (40%) rated the ease of customer access to the Karangahape Road area as 8 or higher, including 17% who rated it as 9 or 10 (on an 11-point scale, where 0 is the lowest and 10 is the highest).
- In contrast, around one in five (21%) of business owners perceive that Karangahape Road is not easy for customers to access and rated this aspect between 0 and 4. Businesses with 50 or more customers during their busiest periods were significantly more likely (34%) to rate the access for customers with between '0' and '4', compared with businesses that have fewer customers during their peak periods (10%).
- The mean rating for this aspect is 6.4.

Figure 4.3: Ratings for Ease of Customer Access



Base N=120 (All respondents).

Table 4.2: Ratings for Ease of Customer Access (%)

	Share of Respondents Business Survey
Share rating 0 to 4	**21**
Share rating 5 to 7	**39**
Share rating 8 to 10	**40**
Mean rating (out of 10)	**6.4**

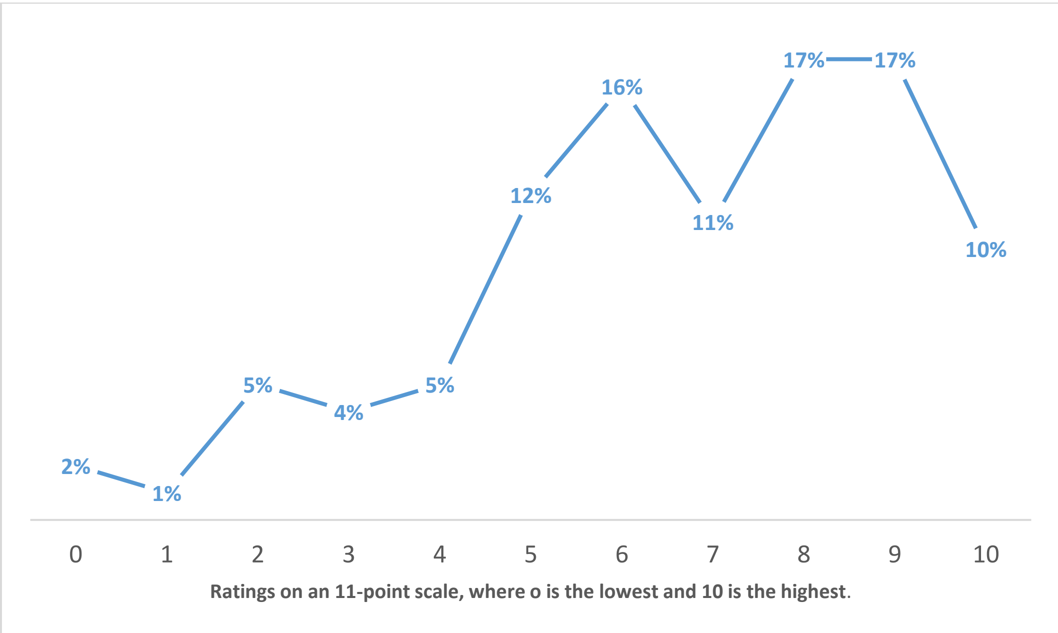
Base N=120 (All respondents. Ratings on an 11-point scale, where is the lowest and 10 is the highest.

Ease of Crossing the Street

Karangahape Road is perceived by business owners as being relatively easy to cross.

- More than two in five business owners (44%) rated the ease of crossing Karangahape Road as an '8' or above, including 27% who rated it 9 or 10 (on an 11-point scale, where 0 is the lowest and 10 is the highest).
- In contrast, 17% of business owners rated this aspect of Karangahape Road between 0 and 4.
- The mean rating score for this aspect was 6.7.
- Whilst mean ratings for business owners and pedestrians were similar (6.7 and 6.6 respectively), pedestrians were less likely to rate the ease of crossing the street positively, 32% giving a rating of 8-10 compared with 44% of business owners.

Figure 4.4: Ratings for Easy to Cross the Street



Base N=119 (All respondents, excluding 'Don't know' responses).

Table 4.3: Ratings for Easy to Cross the Street (%)

	Share of Respondents Business Survey	Share of Respondents Pedestrian Intercept Survey
Share rating 0 to 4	**17**	**12**
Share rating 5 to 7	**39**	**56**
Share rating 8 to 10	**44**	**32**
Mean rating (out of 10)	**6.7**	**6.6**

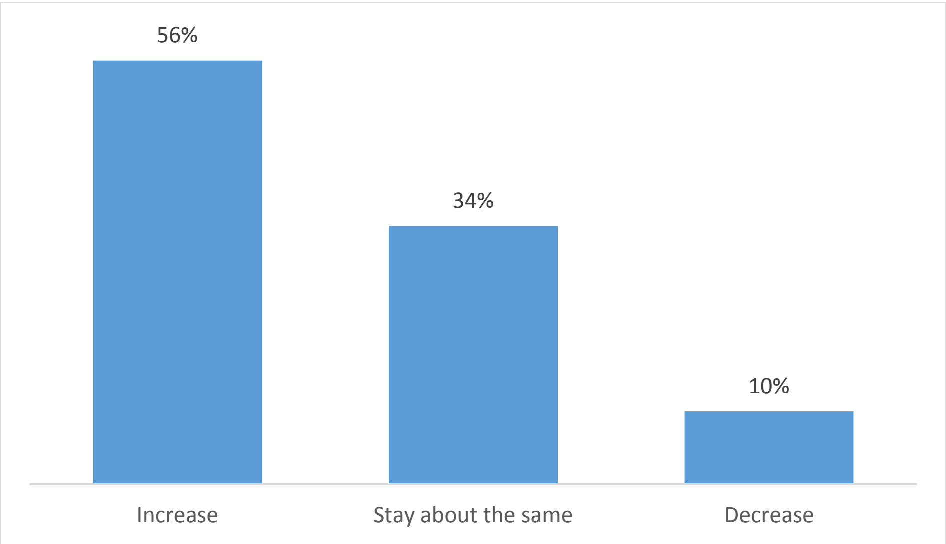
Base Business Survey N=119; Pedestrian Intercept Survey N 619 = (All respondents, excluding 'Don't know' responses).
Ratings on an 11-point scale, where is the lowest and 10 is the highest.

4.3 Expectation of Business Activity (Q10)

Business confidence is relatively strong in the Karangahape Road area.

- Business confidence among respondents is relatively high, with 56% saying that they expect their business activity to increase over the next 12 months.
- In contrast, only 10% expect business activity to decrease. Businesses which have more than 50 customers during their busiest periods, on weekdays and on weekends, were significantly more likely (18%) than businesses with fewer customers (8%) to expect a decrease in business activity over the next year.
- Around one-third (34%) of businesses expect activity to remain about the same over the coming 12 months. Owners of businesses which had been located in the area for 10 years or more (47%) were significantly more likely to expect business activity to remain about the same.

Figure 4.5: Expectations of Business Activity Over the Next 12 Months



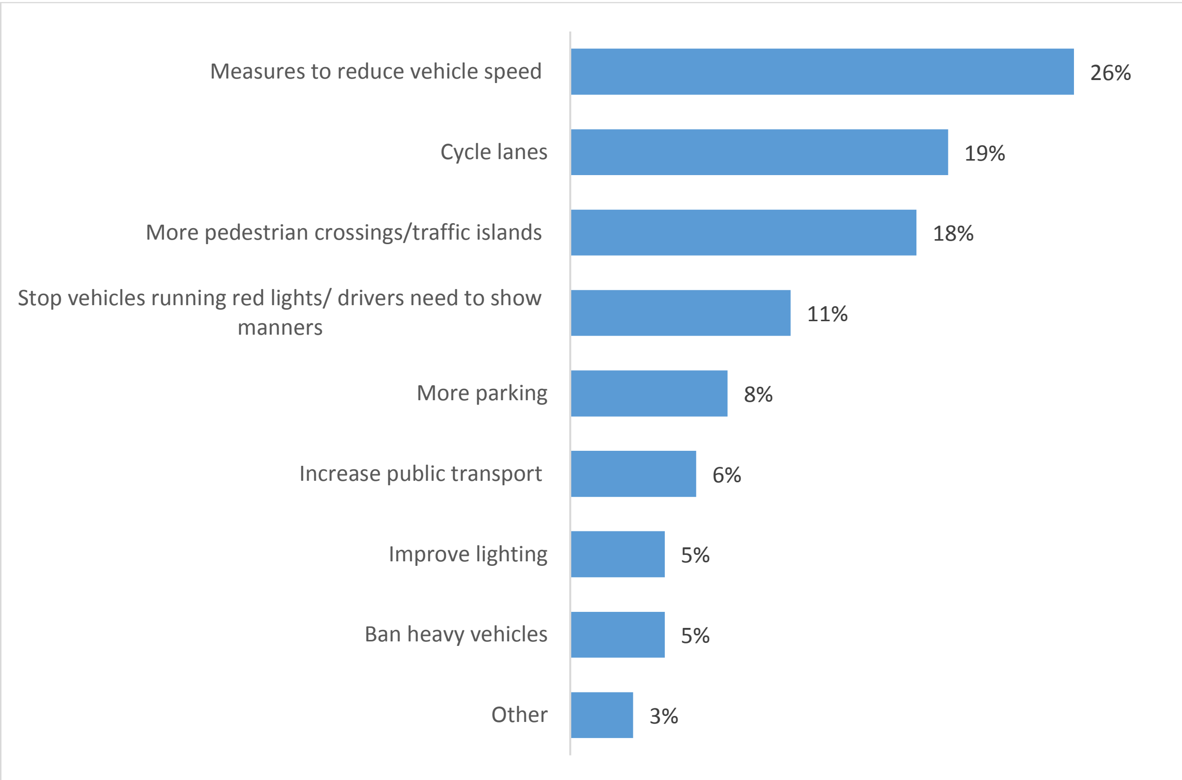
Base N=112 (All respondents, excluding 'Don't know' responses).

5 Suggestions for Enhancement of the Karangahape Road Environment

5.1 Improving Pedestrian Safety from Traffic (Q14)

- Measures to slow down traffic are viewed by 26% of respondents as ways that safety can be improved for pedestrians.
- A further 19% of business owners feel that the introduction of cycle lanes will make pedestrians safer.
- Eighteen percent suggested the creation of more pedestrian crossings and traffic islands.
- Enforcement measures to stop vehicles from running red lights and to drive more courteously were mentioned by 11% or respondents as ways that pedestrian safety could be improved.

Figure 5.1: Suggestions for Improvement to Pedestrian Safety



Base N=62 (All respondents excluding 'Don't know' responses).

Widen the footpaths on the city side and designate the other side to parking short term, maybe diagonal like Ponsonby Road, create curves and plant trees so the traffic needs to slow down.

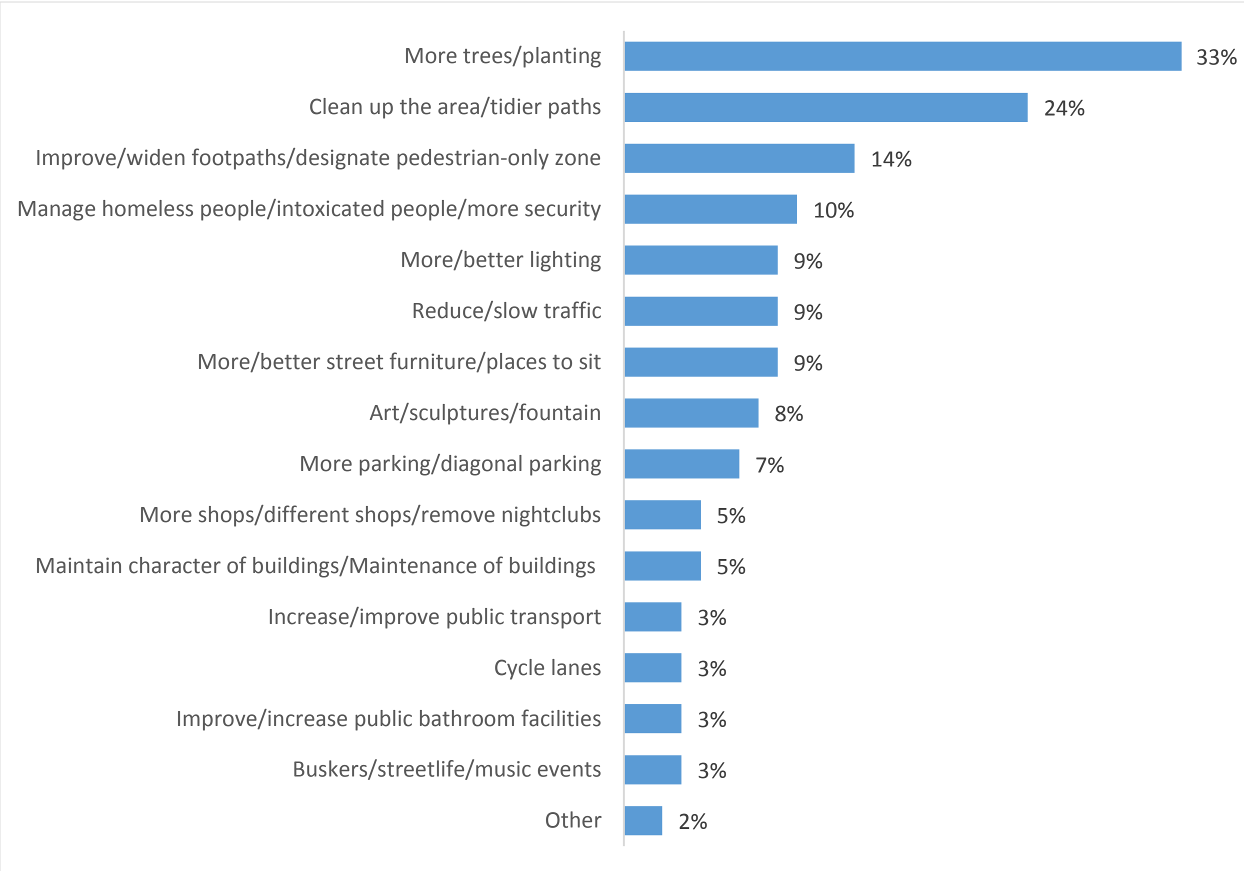
Add more traffic islands in the centre of the road so people crossing only have to deal with traffic in one direction at a time.

5.2 Making Karangahape Road More Physically Attractive (Q15)

Business owners would like the area to have more planting and be kept cleaner.

- One-third (33%) of all those who made suggestions for improving the physical attractiveness of the Karangahape Road area would like to see a greener, more natural environment, including increased planting of trees.
- Approximately one-quarter (24%) would like to see the area being kept cleaner, including tidying up the footpaths, more frequent cleaning of the street, and the provision of more rubbish bins.
- Improvements to the footpaths, including widening and designating pedestrian-only zones, were mentioned by 14% of respondents as measures to increase the attractiveness of the area.
- Ten percent of those who responded to this question made comments about the number of people on the street who appear to be homeless or intoxicated and feel that this element detracts from the area.
- Other suggestions included better lighting (9%), both for aesthetics and safety, and reducing or slowing down the traffic (9%), and more places available for people to sit outside (9%).

Figure 5.2: Suggestions for Making Karangahape Road More Attractive by Share of Respondents



Base N=88 (All respondents excluding 'Don't know' responses). Multiple responses allowed.

Ensure it gets looked after and cleaned like other parts of the city.

Used to be vibrant part of the city with interesting characters. Would be great to see it revived again. It is an art gallery precinct and needs more street art and murals added.

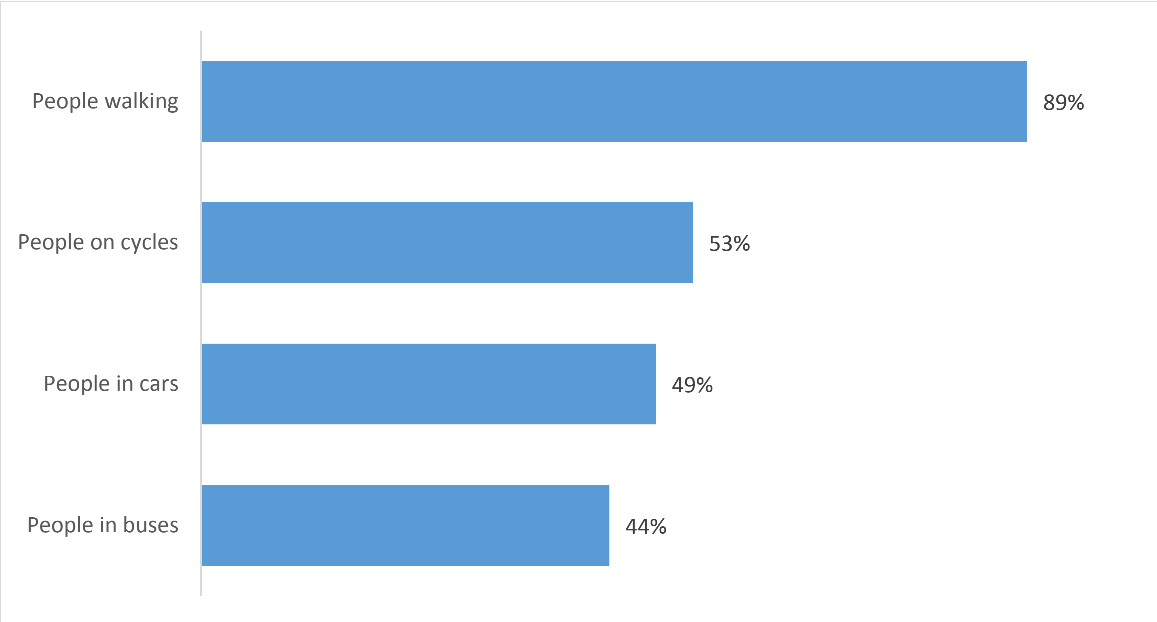
5.3 Priority on Karangahape Road

Business owners were asked for their views on which modes of transport should have priority on Karangahape Road. For the initial data collection via online survey (n=57), the question allowed multiple responses to the question: Which of these groups do you think should have priority on Karangahape Road? The response options were:

1. People walking
2. People on cycles
3. People in cars
4. People on buses
5. Other ***(Please state)***
6. Not sure

- Almost nine in ten respondents (89%) think that pedestrians should have priority on Karangahape Road, while 53% think that cyclists should have priority.
- Approximately half (49%) of business owners think that cars should have priority.

Figure 5.3: Transport Mode Priority on Karangahape Road

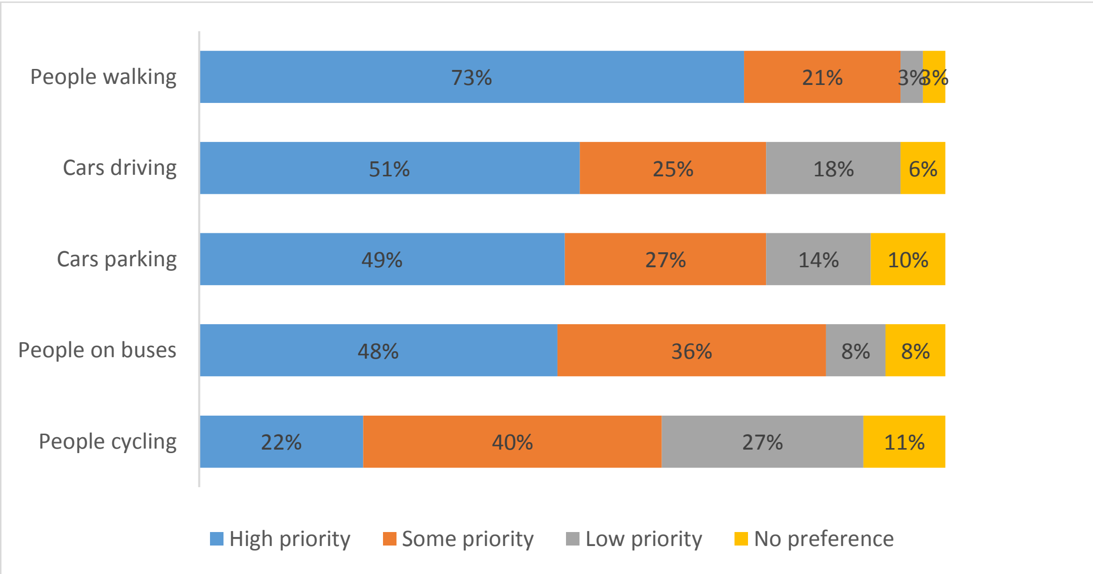


Base N=57 (Online responses received between 13th June and 27th June 2016)
Note: Multiple responses allowed.

In order to gain greater insight, the question was later rewritten to provide for level of priority (high, some, low, or no preference) to be given individually for each of five options: people walking, people on cycles, people in buses, cars driving, and cars parking (N=63).

- Consistent with findings from the initial version of this question, most respondents (73%) feel that people walking should have the highest priority on Karangahape Road, compared with other modes of transport.
- Proportions of those who indicated that the highest priority should go to cars driving (51%), cars parking (49%), and to people on buses (48%) were similar.
- Less than one-quarter (22%) felt that cyclists should have the highest priority on Karangahape Road.
- Twenty-seven percent felt cyclists should be only a low priority on Karangahape Road.
- There were no significant differences between business types, duration of business in the area, or number of employees, in terms of which groups business owners thought should have priority on Karangahape Road.

Figure 5.4: Level of Priority for Modes of Transport



Base N=63 (All responses received between 28th June and 11th July 2016.

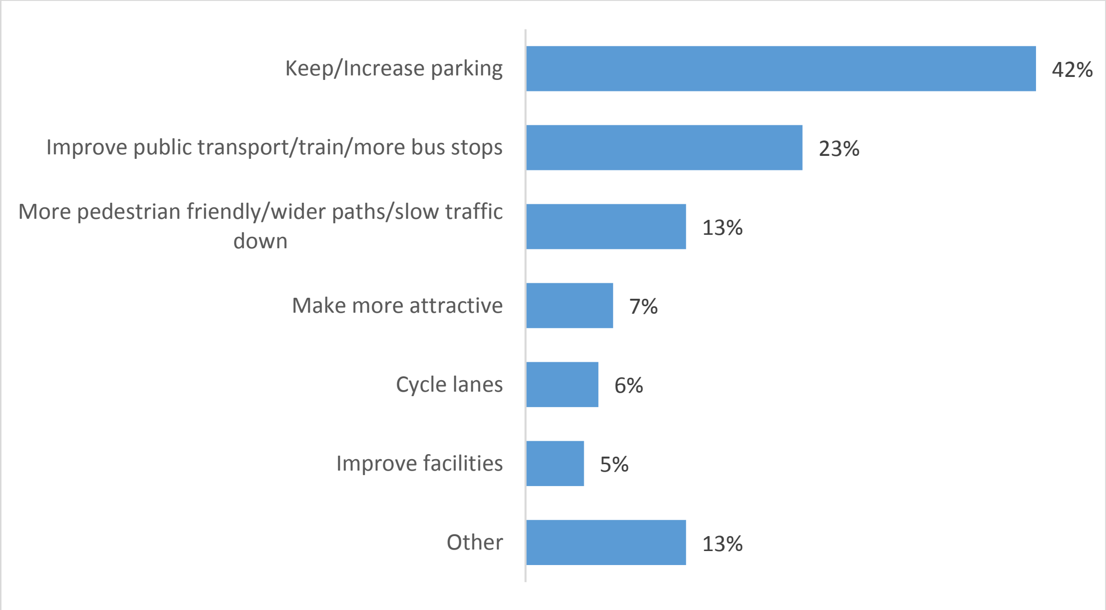
5.4 How Auckland Transport Can Help Businesses (Q16)

Businesses would like current on-street parking to be retained and the number of parking spaces available to be increased.

- Forty-two percent of those who made suggestions as to how Auckland Transport can help businesses in the Karangahape Road area mentioned retaining existing parking in the area and/or increasing the parking available.
- Approximately one-quarter (23%) of business owners would like to see improvements to public transport in the area, including the introduction of trains and more bus stops. Also mentioned was the idea that Karangahape Road could serve as a 'hub' for public transport, thereby attracting increased numbers of people to the area.
- Thirteen percent of respondents made suggestions to improve pedestrian access, for example wider footpaths and measures to slow down the traffic.

- Seven percent of business owners feel that Auckland Transport could support businesses in the area by making it more attractive in a range of ways, including cleaner and with the incorporation of more public artwork.
- The introduction of cycle lanes was suggested by 6% of respondents.

Figure 5.5: Ways in Which Auckland Transport Can Help Karangahape Road Businesses



Base N=84 (All respondents, excluding 'Don't know' responses). Multiple responses allowed.

Most cyclists will just use K Road as a motorway to get to and from places. The only way to offset the negative effects of reduced parks to businesses is to fully upgrade and pave over the road making it a mixed use environment which will make K Rd a more attractive destination and cyclists will stay in the area and benefit the retailers taking up the slack left behind by the reduced carparks.

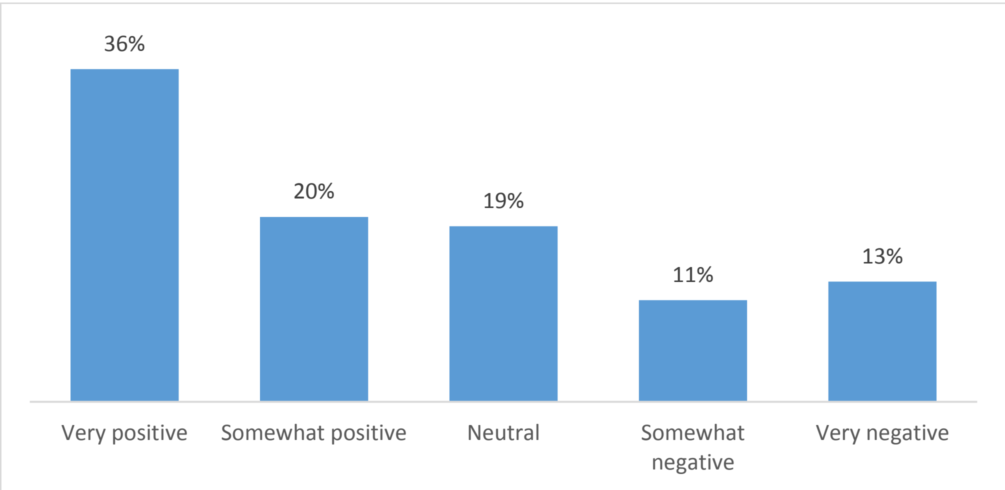
6 Reaction to Proposed Streetscape Enhancements

6.1 Reaction to Introduction of Cycle Lanes

More than half of business owners are positive about the proposed introduction of cycle lanes on Karanagahape Road.

- Over half of those who responded to the survey (56%) feel positive about the introduction of dedicated cycle lanes on Karangahape Road, with 36% feeling very positive.
- In contrast, one-quarter (24%) feel negative about cycle lanes being introduced, with 13% saying they felt very negative.
- There were no significant differences in reaction to the introduction of cycle lanes by characteristics of the businesses.

Figure 6.1: Reaction to Introduction of Cycle Lanes on Karangahape Road



Base N=119 (All respondents, excluding 'Don't know responses).

As long as car parking remained as is because there is so little on the street anyway, so not at the expense of parking. I can't imagine where cyclists' lane would fit. During peak hours they use the bus lanes, correct?

The key question would be what it's likely to do to the overall numbers of people on K Rd. If it's done in a way that will increase foot traffic then that's great. Otherwise, if we remove parking entirely, people are likely to just go to the malls instead.

Reasons that Business Owners Feel Positive About Cycle Lanes (Q19)

Business owners perceive that cycle lanes will increase safety.

- Of those respondents who felt either positive or very positive about dedicated cycle lanes being introduced on Karangahape Road, nearly half (47%) perceived it would improve safety, both for cyclists themselves and for pedestrians.
- Approximately one-fifth (21%) feel that the introduction of cycle lanes would discourage cars and reduce traffic flow on the road.
- Fifteen percent of business owners who responded positively to the proposed introduction of cycle lanes feel that it would encourage more people into the area and increase custom to their businesses.

Table 6.1: Reasons for Being Positive About Dedicated Cycle Lanes

Reason for Positive About Cycle Lanes	Share of Respondents (%)
Safety	47
Reduce traffic/discourage cars	21
Encourage customers/more people would come to the area	15
I cycle/my staff/family/friends cycle	10
Encourage cycling	8
Provided car parking is not removed or reduced	5
Other	6

Base N=62 (Respondents who were ‘Very positive’ or ‘Positive’ about cycle lanes, Q18; excluding ‘Don’t know responses). Multiple responses allowed.

Bikes are a great way of getting around and easy to park. I think that I would like less cars so if there were bike lanes they should be using one of the car lanes .... not the foot path.

Reasons Business Owners Feel Negative About Cycle Lanes (Q19)

Those opposed to cycle lanes perceive that their introduction would increase traffic congestion.

- The most common objection raised with regard to the introduction of cycle lanes on Karangahape Road was that the road is already congested with traffic, and cycle lanes will have a negative impact on this by reducing the space available for vehicles (29%).
- One-quarter (25%) of business owners identified that cyclists might be more likely to be using the road as a thoroughfare, rather than stopping as customers in the area.
- Eighteen percent of business owners were negative toward the introduction of cycle lanes as they feel that they would take up too much road space.
- Eighteen percent also perceive that cycle lanes would be dangerous for those using them.

Table 6.2: Reason for Being Negative About Cycle Lanes

Reason for Negative About Cycle Lanes	Share of Respondents (%)
Road already congestion/will increase traffic problems	29
Will be bad for business/cyclists will be 'through' traffic not shoppers	25
Not enough space/will take up too much road space	18
Too dangerous	18
Unnecessary	11
Few cyclists	7
Other	7

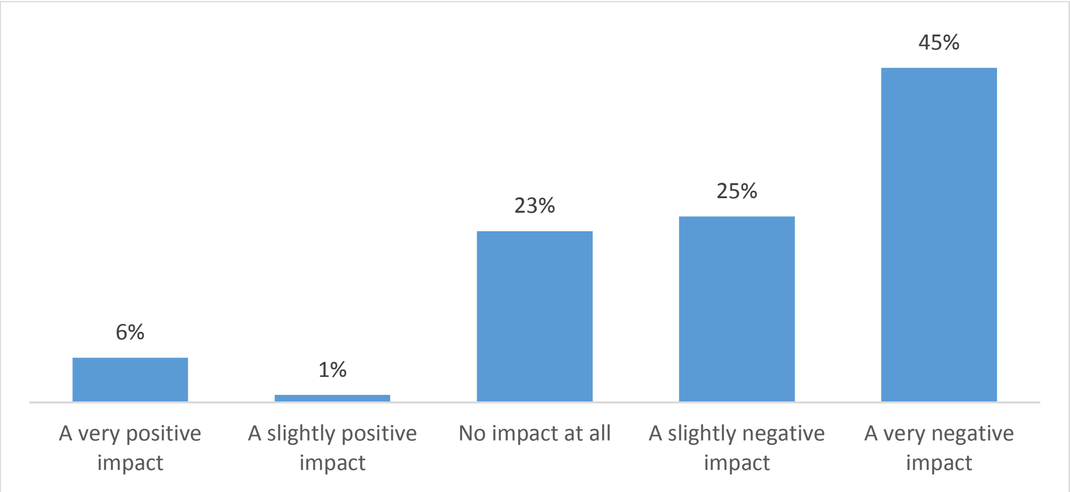
Base N=28 (Respondents who were 'Negative' or 'Very negative' about cycle lanes, Q18; excluding 'Don't know' responses). Multiple responses allowed.

6.2 Perceived Impact of Fewer On-Street Carpark Spaces (Q20)

Most business owners perceived that a having fewer on-street car parking spaces available on Karangahape Road would have a negative impact on their business.

- Seven in ten respondents (70%) thought that a reduction in on-street car parks on Karangahape Road would have a negative impact on their business, including 25% who said that it would have a very negative impact. Food and beverage businesses were over-represented (83%) among those saying that fewer on-street car parks would have a negative impact on their business.
- Seven percent of respondents think that reducing on-street car parks would have a positive impact, including 6% who think it would have a very positive impact.

Figure 6.2: Perceived Impact of Fewer On-street Carparks On Karangahape Road



Base N=116 (All respondents, excluding 'Don't know' and 'Depends' responses).

Reason for Being Positive About Fewer On-Street Carparks (Q21)

- Three respondents felt that fewer on-street carparks would make it safer for people, perceiving that it would improve the atmosphere or character of the area. Two also thought that fewer on-street carparks would bring in more visitors to the area.

There is no need for parking - make it a people space.

It would make K Road a more desirable place and probably encourage more eateries to open up.

Reason for Being Negative About Fewer On-Street Carparks

- The most commonly mentioned reason for feeling negative about a reduction in on-street car parking on Karanagahape Road was that it would result in fewer customers coming to the area, mentioned by 39% of business owners.
- Business owners feel that their customers need somewhere to park when they visit their premises (31%) and that there is already a lack of parking in the area (16%).

Table 6.3: Reason for Being Negative About Fewer On-Street Carparks

Reason for Negative About Fewer On-Street Parks	Share of Respondents (%)
Would reduce customer numbers/People would go elsewhere	39
Many customers drive/Parking is necessary	31
Already lack of parking in the area/Customers complain	16
Other	6

Base N=77 (Respondents who were 'negative' or 'very negative' about fewer on-street carparks, Q20; excluding 'Don't know' responses). Multiple responses allowed.

Car parks are necessary for the majority of my customers i.e. destination shoppers. My customers come specifically to my store - and then they eat lunch, visit other stores and spend quite a bit of money in K Road in general. They are ALREADY complaining about a lack of parking.

We need high customer count, and a reasonable part of customers come by car and need convenience. It separates us from places like Queen St where it's hard to park. Business is always hard on K Rd, and we can't lose customers.

Perception is everything. If shoppers see parks removed, they will naturally think it is more difficult to find a park, and will go to a mall where it is free.

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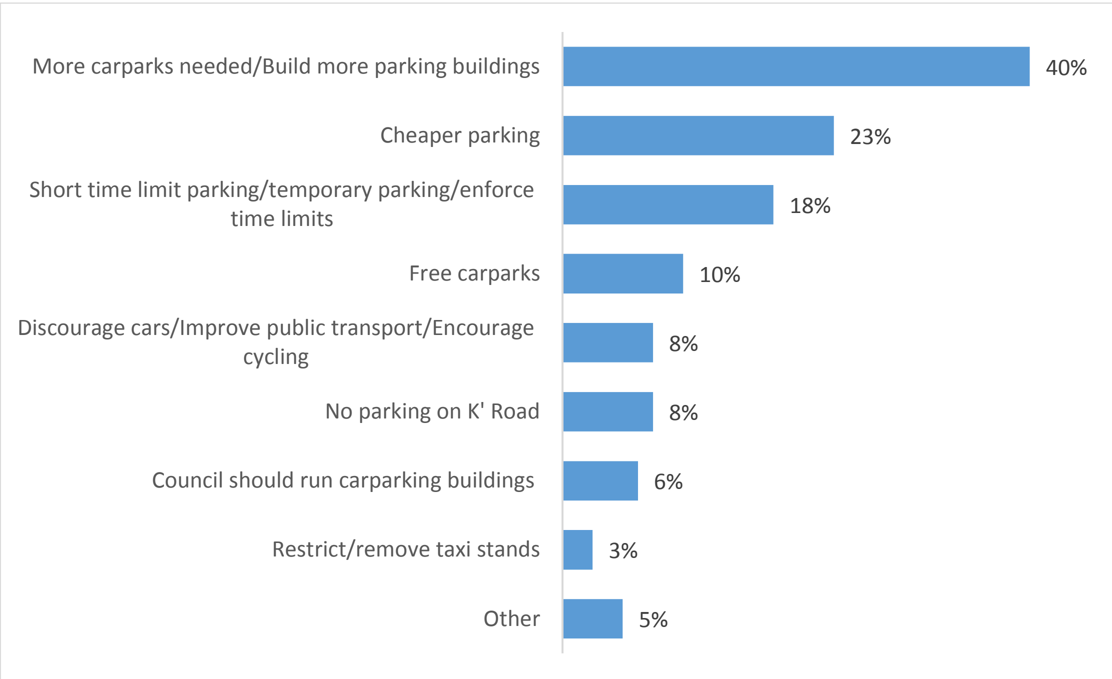
6.3 Managing Parking in the Area (Q22)

Business owners would like more car parking spaces available in the Karangahape Road area.

- Forty percent of respondents suggested that an increase in parking spaces for cars would help to manage car parking on and around Karangahape Road. More specifically, some suggested that additional carpark buildings would be beneficial, including underground parking. Six percent (6%) would like the Auckland Council to manage car parking buildings in the area, rather than having these run by private operators.
- Around a quarter (23%) suggested that car parking in the area should be cheaper and 10% would like some free parking available for visitors to the area.
- Eighteen percent suggested that an increase in short time limit parking, along with enforcing time restrictions, would be beneficial.
- Eight percent of respondents indicated that they would like to see no car parking on Karangahape Road, while a further 8% suggested improving public transport and discouraging cars from the area.

Figure 6.3: Suggestions for Managing Parking



Base N=77 (All respondents excluding 'no response'; multiple responses allowed).

Parking should be on side streets, not on major roads - this is true throughout the city, not just K' Rd. Parking on busy roads increases congestion and is dangerous to pedestrians and drivers.

Need a new multilevel carpark in the middle of K Rd. Save space and profitable in the long run.

More car park areas, so people can come from far to shop here without having to find a side street.

Improve transport so people don't feel the need to drive.

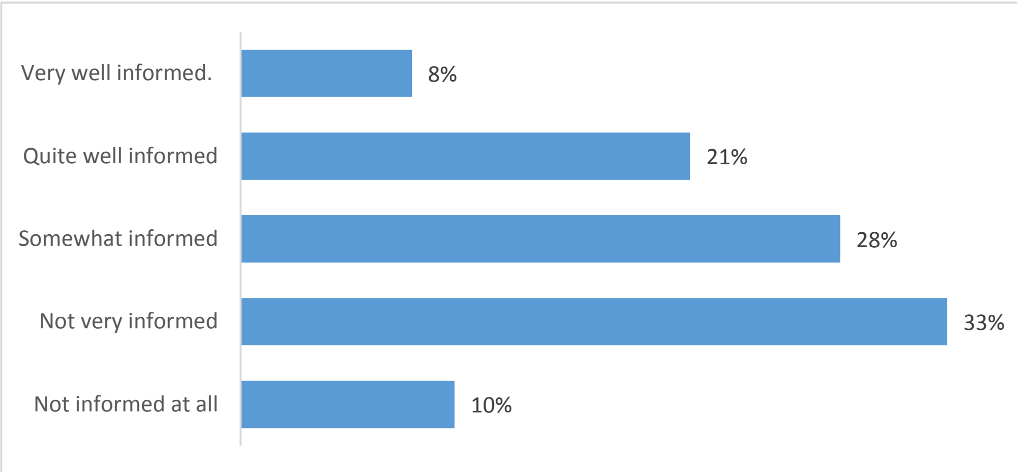
6.4 Information About Streetscape Enhancement Project

How Well-Informed Business Owners Feel (Q17)

Business owner do not feel that they are well informed about the Streetscape Enhancement Project.

- One-third of respondents (33%) said that they were not very well informed about the project, while a further 10% feel that they are not informed at all.
- In contrast, 8% of business owners feel very well informed about the Karanagahape Road Streetscape Enhancement Project and 21% felt quite well informed.
- Businesses with fewer than four employees (19%) were significantly more likely to feel that they are not informed at all about the Streetscape Enhancement Project.

Figure 6.4: Informed on Streetscape Enhancement Project



Base N=120 (All respondents).

Preferred Form of Information (Q17a)

Email is the form of communication preferred by business owners for information on the Streetscape Enhancement Project.

- The preferred mode of communication for updates on the Streetscape Enhancement Project is email, with 48% of respondents indicating they would like to be kept informed this way.
- Thirty percent would like to receive brochures or pamphlets with information about the project, while 15% said they would like newsletters to provide the information they need on the project.

Table 6.4: Preferred Form of Information

Form of Information	Share of Respondents (%)
Email	48%
Brochures/flyers	30%
Newsletter	15%
Other	7%

Base N=54 (All respondents, **excluding** 'Don't know' responses). Multiple responses allowed

Type of Information

Business owners would like to be informed on timeframes for the Streetscape Enhancement Project.

- Business owners most commonly requested information on the proposed timeframes of the Streetscape Enhancement project taking place, including anticipated starting and finishing dates (23%).
- Nineteen percent said that they would like to receive regular updates on the project.

Table 6.5: Type of Information Requested

Information	Share of Respondents
Timeframes of proposed work	23%
Like to receive regular updates	19%
Everything/all information	17%
To know what the proposed changes are	15%
Access to designs/plans	15%
How it will affect my business	13%
Feedback from other businesses	4%

Base N=48 (All respondents excluding 'Don't know' responses). Multiple responses allowed.

6.5 General Comments (Q24)

Business owners made a number of unprompted comments in the survey in relation to the Streetscape Enhancements Project. These included:

- Customers need to park/many customers drive cars to the area;
- Reducing carpark spaces will reduce customers/be bad for business;
- A reduction in car parking spaces will improve the atmosphere/encourage foot traffic;
- Car parking in the area is too expensive; and
- We have our own designated parking/changes won't affect my business.

A selection of illustrative comments made by respondents are as follows:

> *Depending on its impact on the street, cycle lanes could be a good option. But (as a cyclist) my preference would be to have integrated and vibrant space that slows down the traffic and makes it safer for both cyclists and pedestrians without necessarily creating segregation for cyclists. Separate channels work well on thoroughfares, but for K Rd I think we should be trying to create something more integrated which really encourages people in.*

> *Auckland has too many shopping zones. They all need to be better linked. Queen Street to K Rd to Ponsonby is such a walk. The shopping from all these places needs to better linked. If the trams were still running along this route that'd be amazing but I think when the new train system comes in that'll help link K Rd to the rest. Ponsonby also needs to more linked with K Rd and Victoria Market and that*

needs to be better linked with the water front. And by linked I mean with nice footpaths more shops and transport and cycleways.

Pavements work well and are rarely overcrowded. Character of the precinct is a mix of old buildings, busy pavements and through traffic. Please do not attempt to turn K Rd into another pedestrian / traffic mixed zone. It does not have the businesses with brands and profit margins to support that concept.

We closed our business in May. We felt worn down by the difficulties the area presents - the increased cost in parking meter costs and clients caught out by the Wilson's Parking Building. We perceived that business was not going to improve as the CRL construction begins.

APPENDIX

Business Owners' Pre-Works Questionnaire

gravitas

Auckland Transport and Auckland Council
Karangahape Road Streetscape Enhancement Project – Business Survey
QUESTIONNNAIRE June 2016

Auckland Transport and Auckland Council invite businesses in the Karangahape Road area to provide their views on the Streetscape Enhancement Project. Please fold, tape closed, and **post** back your completed questionnaire (no stamp required) by **1st July.** Alternatively, you can enter your responses **online** by going to the Gravitas website www.gravitas.co.nz and clicking on the link for **Karangahape Road Business Survey.**

If you have any queries regarding the research, please phone Sue at Gravitas Research on 09 3568842 or email sue@gravitas.co.nz.

Current Situation

Q1. Which of the following were factors in choosing to locate your business on Karangahape Road? ***Please circle as many as apply.***

1. On bus routes
2. Availability of parking for staff
3. Availability of parking for customers
4. Foot traffic volumes
5. Visibility
6. Proximity to CBD
7. Cost of premises, low overheads etc.
8. Characteristics of the premises – sufficient space, appropriate floor plate
9. Characteristics of the local area – 'feel', atmosphere etc.
10. Close proximity to similar businesses
11. Close to owner's home
12. Proximity to other services such as banks, food and beverage
13. Space was available when I needed it
14. Other ***Please state*** ____
15. Don't know/Wasn't involved in this decision

Q2. **ON WEEKDAYS, during which of the following time periods does your business usually have the most customers?** ***Please circle one response only.***

1. Before 12pm
2. Between 12pm-5pm
3. After 5 pm
4. Don't know

Q3. **And during this period on a weekday, approximately how many customers would you have coming to your place of business?** ***Please circle one response only.***

1. Fewer than five
2. Between five and nine
3. Between 10 and 19
4. Between 20 and 49
5. 50 or more
6. Varies too much to say
7. Don't know

Q4. **Approximately what proportion of your customers ON A WEEKDAY travel to your business using the following modes of transport?**

Type in percentage for each. Please make totals add to 100%.

_______ % Private vehicle (as a driver or passenger)
_______ % Taxi
_______ % Bus
_______ % Bike
_______ % Walking, jogging, scooter, skateboard etc.

If any of your customers ON A WEEKDAY travel by private vehicle:

Q5. Which of the following parking options are you aware that your customers use if they travel to K Road by private vehicle on a weekday? ***Please circle as many as apply.***

1. Your business's designated customer parking
2. Another business's designated customer parking
3. On-street parking on K Road
4. On-street parking on another nearby road
5. Wilson or Auckland Transport car park buildings around the K Road area
6. Park outside the K Road area
7. Other ***(Please state)*** ____
8. Didn't park (e.g. got dropped off)
9. Don't know

Q6. ON WEEKENDS, during which of the following time periods does your business usually have the most customers? ***Please circle one response only.***

1. Before 12pm
2. Between 12pm-5pm
3. After 5 pm
4. Don't know

Q7. And during this period on weekends, approximately how many customers would you have coming to your place of business? ***Please circle one response only.***

1. Fewer than five
2. Between five and nine
3. Between 10 and 19
4. Between 20 and 49
5. 50 or more
6. Varies too much to say
7. Don't know

Q8. What proportion of your customers ON THE WEEKEND travel to your business using the following modes of transport?

Type in percentage for each. Please make totals add to 100%.

_______ % Private vehicle (as a driver or passenger)
_______ % Taxi
_______ % Bus
_______ % Bike
_______ % Walking, jogging, scooter, skateboard etc.

If any of your customers ON THE WEEKEND travel to your business by private vehicle:

Q9. Which of the following parking options are you aware that your customers use if they travel to K Road by private vehicle on a weekend? ***Please circle as many as apply.***

1. Your business's designated parking
2. Another business's designated parking
3. On-street parking on K Road
4. On-street parking on another nearby road
5. Wilson or Auckland Transport car park buildings around the K Road area
6. Park outside the K Road area
7. Other ***(Please state)*** ____
8. Didn't park (e.g. got dropped off)
9. Don't know

Q10. Over the next 12 months, do you expect your business activity to:
Please circle one response only.

1. Increase
2. Stay about the same
3. Decrease
4. Don't know

Perspectives On Karangahape Road

Q11. What do you currently like most about having your business located in the K Road area?

____

____

____

Q12. (A) Which of these groups do you think should have priority on K Road?

Please choose as many as you want.

1. People walking
2. People on cycles
3. People in cars
4. People on buses
5. Other (Please state) ___________________
6. Not sure.

Q12. (B) Please indicate the level of priority each of these groups should have on K Road?

	High priority	Some priority	Low priority	No preference
People walking	☐	☐	☐	☐
People on bikes	☐	☐	☐	☐
Cars, driving	☐	☐	☐	☐
Cars, parking	☐	☐	☐	☐
People on buses	☐	☐	☐	☐

Q13. On a scale of 0 to 10 where 0 is very poor and 10 is excellent, how would you rate K Road for being:

A safe and pleasant environment?	**0**	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**
Easy for your customers to access?	0	1	2	3	4	5	6	7	8	9	10
Easy to cross the street from one side to the other?	0	1	2	3	4	5	6	7	8	9	10

Q14. What could Auckland Transport do to help people feel safer from cars and other traffic when on Karangahape Road?

____

____

____

Q15. What could Auckland Transport do to make Karangahape Road more physically attractive?

____

____

____

Q16. What could Auckland Transport do to help your business and other businesses on Karangahape Road?

____

____

____

Karangahape Road Streetscape Enhancement Project

Q17. With regard to the Karangahape Road Streetscape Enhancement project would you say you are …?

Please circle one response only.

1. Not informed at all
2. Not very informed
3. Somewhat informed
4. Quite well informed
5. Very well informed
6. Other ***Please state*** ____

Q17a. How would you like to be kept informed on the project?

____

Q18. How would you feel about dedicated cycle lanes being introduced into K Rd? These lanes would be separated from vehicle traffic. Would you be:

Please circle one response only.

1. Very positive
2. Somewhat positive
3. Neutral (it wouldn't make any difference to you)
4. Somewhat negative
5. Very negative

99. Don't know

Q19. Why do you feel this way?

____

____

____

Q20. If there were fewer on-street car parks on K Road, what impact do you think this would have on your business? *Please circle one response only.*

1. A very negative impact
2. A slightly negative impact
3. No impact at all
4. A slightly positive impact
5. A very positive impact
6. Depends
7. Don't know

Q21. Why do you feel this way?

____

____

____

Q22. What could Auckland Transport do to better manage parking in the K Road area?

____

____

____

Q23. What other information would you like about the Karangahape Road Streetscape Enhancement project?

____

____

____

Q24. Do you have any other comments or suggestions in relation to the Karangahape Road Streetscape Enhancement project?

____

____

____

____

Business Profile

Q25. How long has your business been operating in the K Road area for?

Please circle one response only.

1. Less than one year
2. Between one and five years
3. Between six and ten years
4. More than ten years
5. Don’t know

Q26. Which ONE of the following best describes your business or organisation?

Please circle one response only.

1. Retail
2. Entertainment
3. Food and beverage
4. Art/design
5. Accommodation
6. Automotive
7. Banking and finance
8. Church
9. Community Service
10. Education
11. Electrical/Electronics/Engineering/I.T.
12. Media / Marketing
13. Medical and healing
14. Professional services
15. Other ***Please state*** ____
16. Don't know

Q27. Including yourself, how many staff does your business employ who work from your K Road location? Please include part-time and casual staff. ***Please circle one response only.***

1. One
2. Two to three
3. Four to five
4. Six to ten
5. 11-20
6. 20-49
7. 50-99
8. 100 or more

Q28. What proportion of your staff travel to your business via the following modes of transport?

Type in percentage for each. Please make totals add to 100%.

_______ % Private vehicle (as a driver or passenger)

_______ % Taxi

_______ % Bus

_______ % Bike

_______ % Walking, jogging, scooter, skateboard etc.

If any of your staff travel by private vehicle:

Q29. Which of the following parking options are you aware that your staff use when travelling to work by private vehicle? ***Please circle as many as apply.***

1. Your business's designated customer parking
2. Another business's designated customer parking
3. On-street parking on K Road
4. On-street parking on another nearby road
5. Wilson or Auckland Transport car park buildings around the K Road area
6. Park outside the K Road area
7. Other ***(Please state)*** ____
8. Didn't park (e.g. got dropped off)
9. Don't know