Absolutely Positively **Wellington** City Council
Me Heke Ki Pōneke

File ref: IRC-5492

27 October 2023

[redacted]

Kia ora [redacted]

Report into impact of street changes on Wellington retailers

Thank you for your requests made under the Local Government Official Information and Meetings Act 1987 (the Act), these requests were received via:

- An email to Councillor Calvert received on 19 September 2023
- A request made via the FYI website on 26 September 2023
- An email to Business Engagement Principal Advisor, Rula Awad on 22 September 2023

In response to a Council news article published on our website regarding a new Wellington City Council report which uses Eftpos spending figures to measure the effects of pedestrian and bike-friendly street changes on local retailers, you requested the following information:

1. The detailed commentary & crucially the report from Infometrics Dr Adolf Stroombergen.
2. The chamber of commerce suggestions.
3. The data supplied by Dot Loves Data (recently purchased by ANZ) and the ANZ itself.
4. The Chamber commented on tone and made suggestions so the report was more responsive to Retailer concerns, I would like the reports that support the report that WCC pushed out into the public arena to review it.
5. The feedback used from:
    - Wellington on a Plate board
    - Retailers
    - FirstRetail
    - Chamber of Commerce
    - Councillors
    - Officials
    - Other stakeholders

Wellington City Council has partly granted your request for information.

Question 1 - The detailed commentary & crucially the report from Infometrics Dr Adolf Stroombergen.
Please find attached to this response 'Appendix 1' which is a copy of Dr Adolf Stroombergen's methodological review of the Changing Lanes analysis.

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Question 2 - The chamber of commerce suggestions.
I can confirm Council officers spoke with the Chamber of Commerce; however, the Chamber did not provide a written response. Council officer recollections regarding their verbal feedback is as follows:

- The Chamber commented that Council could do better in terms of managing communications around the cycleways, and that this had negatively impacted some in the retail community.

- The Council should give greater voice to the retailer. The Changing Lanes report should aim to provide a more balanced perspective on retail spend and the impact of cycleways.

Question 3 - The data supplied by Dot Loves Data (recently purchased by ANZ) and the ANZ itself.
As confirmed in the response to your email from Councillor Calvert on 15 September 2023, to get a better coverage of merchants we consulted with Dot Loves Data (recently purchased by ANZ) and ANZ itself to determine whether they had more efficient data source. In the time available, they were not able to assist.

Page 3 of the Changing Lanes report confirms the point-of-sale data comes from MarketView.

We are therefore refusing this part of your request under 17(e) of the Act because the requested information does not exist.

Question 4 - The Chamber commented on tone and made suggestions so the report was more responsive to Retailer concerns.
I would like the reports that support the report that WCC pushed out into the public arena to review it.
After thorough consultation with the suppliers of the data used in the Changing Lanes report, the decision to withhold this information has been made under section 7(2)(b)(ii) of the Act, where making available the information would likely prejudice the commercial position of the person who supplied the information.

Question 5 - The feedback used from the list provided.
Council has been modelling retail impact from Council interventions for a number of years. This has ranged from modelling the positive retail and hospitality impacts from events and festivals like Wellington On A Plate that Council funds, right through to understanding the impact of infrastructure changes in the city on nearby businesses.

Over those years Council has built up a good understanding of how to undertake this type of research and feedback received in the development of that work has been used to refine the analysis methodology over that period of time. What this means is that we have done analysis on a range of projects and interventions over many years, and not just limited to the Changing Lanes report.

As the Council does not maintain a register of these responses and feedback received, as it stands this part of your request would take considerable time for officers to manually search and collate the information you have requested over a substantial period of time. Without refining your request, the Council would either consider refusing your request under section 17(f) of the act due to substantial manual collation or research or we may consider charging for the request.

However, Council officers have provided example copies of feedback received below, from information they have to hand:

Item	Document name/description	Decision
Appendix 2	Feedback from FirstRetail dated August 2020.	Released. Redacted section 7(2)(a) of the Act.
Appendix 3	Feedback from FirstRetail dated October 2020.	Released. Redacted section 7(2)(a) of the Act.
Appendix 4	Feedback from FirstRetail dated May 2023.	Released. Redacted section 7(2)(a) of the Act.

Please note, some information has been redacted under section 7(2)(a) of the Local Government Official Information and Meetings Act 1987, as it contains personal information about private individuals.

Right of review

If you are not satisfied with the Council's response, you may request the Office of the Ombudsman to investigate the Council's decision. Further information is available on the Ombudsman website, www.ombudsman.parliament.nz.

Please note, we may proactively release our response to your request with your personal information removed.

Thank you again for your request,

Kind regards

Ollie Marchant
Official Information

Date: 26 July 2023

To: Martin Rosevear, Welllington City Council

From: Adolf Stroombergen

Subject: Review of analysis in connection with the Developmental Retail Activity Monitor.

Introduction

The analysis sought to establish whether roadworks at various locations in the city affected sales at those locations, particular after their completion. Sales data excluded cash transactions and online transactions, although this is unlikely to significantly bias the results.

Given the deliberate exclusion of establishments not thought to be directly exposed to roadworks, the analysis was biased towards finding an effect. Hence findings of little effect would strengthen the argument that the effects were small or insignificant.

Analysis

The initial analysis was largely a graphical comparison of the subject locations with control locations. This was a useful step, but could not provide definitive inferences as different orders of magnitude between sales in the subject areas and sales in the benchmark areas can distort graphical comparisons. Also the choice of appropriate benchmarks is not always clear and the two-week smoothing of the data could have removed real signals rather than just removing noise.

Econometric analysis was therefore recommended, notably two approaches:

1. Regressions of the time series for the subject areas against those for the benchmark areas, with dummy variables for the periods of roadworks and to distinguish between the pre- and post-work periods.
2. A 'difference in differences' approach.

Results

After some iterations of the analysis the conclusions seem sufficiently robust. Overall the results suggest some negative effects on the absolute level of sales, but when corrected for changes in sales in the control areas there were no permanent relative effects. For the particular locations:

- Riddiford St.: no relative impact on sales during the work, 11% (central estimate) reduction post-works, but not relative to the benchmark.

- Tinakori Rd.: No significant impacts during or post-works.
- Adelaide Rd.: reduction insales during works and a 12% reduction post-works, but not relative to the benchmark.
- Thorndon Quay: No significant impact during or after the roadworks.
- Dixon St.: Smalll increase in sales during and after the roadworks, but results may be influenced by people avoiding the Manners St. area for other reasons.

Caveats

Some caveats are worth noting:

1. For some locations, such as Adelaide Rd. and Riddiford St. the results may be sensitive to the choice of benchmark area. If possible the analysis should be repeated with other benchmark areas.

2. Most of the roadworks were relatively minor. Thus the findings of little to no effect may not be be valid in situations where roadworks last a long time, like many months or years, and where the final impact on the configuration of traffic and pedestrian flows is vastly different from the pre-change situation. Proposed chages to Wellington's Golden Mile might be an example.

3. Reductions in sales at particular locations should not be interpreted as net reductions in sales in Wellington city. Most spending is simply redirected, although this can still be substantial if the loss of key establishments undermines the economic viability of other activities in the same area.

From:	BUS: Assurance
To:	Ollie Marchant
Subject:	FW: Urmila LGOIMA
Date:	Wednesday, 4 October 2023 12:04:20 pm
Attachments:	image001.png image002.png image003.jpg

From: Chris Wilkinson <chris@firstretailgroup.com>
Sent: Monday, 10 August 2020 12:47 pm
To: Martin Rosevear <Martin.Rosevear@wcc.govt.nz>
Cc: Rula Awad <Rula.Awad@wcc.govt.nz>; Lorraine Nicholson <lorraine@firstretailgroup.com>
Subject: Re: Trends Overview

Our pleasure. Sorry it was in many directions.

Yes, investors will need to wait, however some may be forced to divest (by banks) as their loan to value ratio tllts too far. Similarly, banks are making blanket decisions about sectors and areas, which will limit (or extinguish) credit for property owners or tenants.

We know there are a number of retailers looking at contraction if they could exit leases without recourse on guarantees, etc. Others that are able to have moved to month-by-month and percentage of turnover arrangements, while they attempt to understand how trading patterns will evolve.

I'd see residential growth winners be the 'greenfield' opportunities including Kenepuru Landing, Paraparaumu Airfield and other areas adjacent to commercial centres and transport links. Less beneficial will be traditional subdivisions that are less 'connected'. The Wairarapa will see more sea-changers and tree-changers, but don't see the numbers/scale being of such to make a big difference. We're working with Councils there now.

Hoping that helps, Chris

On Mon, 10 Aug 2020 at 10:40, Martin Rosevear <Martin.Rosevear@wcc.govt.nz> wrote:

> Chris
>
> A somewhat formidable response! Thankyou.
>
> Given these issues, a few questions:
>
> 1. Investment
>
> What would a canny investor do? Wait ….. ?
>
> 2. CBD
>
> Where do you expect to see consolidation/expansion?
>
> 3. Residential growth
>
> In terms of the competition for residential investment, who is likely to be the big winner (i.e. Wairarapa, City/CBD apartments …) over the next five years or so?

Martin Rosevear
Senior Advisor Research & Evaluation (Economic Focus)
Rangahau me te Aromātai | Research & Evaluation
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https://email-signature-images.s3-ap-southeast-2.amazonaws.com/wcc-banner-new.jpg

From: Chris Wilkinson [mailto:chris@firstretailgroup.com]
Sent: Monday, August 10, 2020 9:18 AM
To: Martin Rosevear; Rula Awad
Cc: Lorraine Nicholson
Subject: Trends Overview

Good morning Martin,

As promised, here is a brief summary of where things are up to regarding retail, hospitality and property relative to these sectors.

A few ideas and insights to pull themes from for your summary. I hope this helps.

Property

Increasing and Sustained Vacancy. Prime and sub-prime sites are becoming available with diminished leasing potential. This will affect property values in the longer term, the potential for reinvestment (such as strengthening) and impact vibrancy with fewer occupied units.

Challenging Return. Prime retail rents in the CBD are anticipated to fall 10% as leases renew, while secondary retail locations could fall as much as 20% according to valuers' association RCIS.

Consolidation. Business with multiple representation are consolidating to fewer, more productive locations. The Warehouse and Michael Hill Jeweller's closure in Johnsonville is one example, however we are seeing similar trends in the CBD with the trading banks and travel agents taking an early lead. Wellington CBD has a large number of retail and hospitality operators with multiple sites, so this trend could be especially impactful if it continues.

Decentralisation. We know large employers such as the Government through MBIE are advancing on further suburban accommodation solutions in Porirua and the Hutt Valley. This is likely to gain momentum and will likely include the Wairarapa and Kapiti with shared facilities for multiple departments. We anticipate larger private sector employers may also look to develop regional 'pods' or facilities where staff can work closer to home as a way to support their workforce and reduce travel requirements.

Hospitality

Flexible Working Impact. Mojo still have two large Wellington sites closed (Superfino Terrace and Jervois Quay), while anchor tenancies have exited Willis Street's Press Hall (Tommy Millions, Bao Boy and Fratelli). These sites all service large, immediate office populations which have moved to flexible working arrangements - creating variable and uncertain future performance. Overall, CBD businesses are experiencing significant shifts in demand over the week with consumers' working from home on Mondays and Fridays. Conversely, our suburbs are seeing increased demand because of this. Areas such as the Wairarapa, Kapiti and Horowhenua are also experiencing growth because of these shifts.

CBD Losing its Unique Edge. Wellington CBD's edge as a unique and experiential hospitality destination is increasingly challenged by improving suburban offers, Petone's Jackson Street Precinct and emerging markets - such as Upper Hunt's Brewtown. There has been significant improvement in local suburban hospitality offers in recent years, which has also affected growth and performance for CBD businesses as more people choose to drink and dine closer to home.

Retail

Audience Shifts. The CBD's retail, hospitality and service offer has evolved to align with its working, educational, visiting and residential audience. Significant changes to this audience - including flexible working are impacting performance and confidence for businesses.

Recent Spending Trends. Retail performance has been strong across most categories since the move to level 2 restrictions. This has been primarily due to suppressed spending during level 4 and 3, increased appetite to enrich lifestyles and home environments and redirected spending consumers would otherwise have made during offshore holidays. Domestic - including regional, tourism has been strong and this has been buoyed further by recent school holidays. A particularly mild winter has also helped - encouraging people out to shop and socialise.

Forward Spending. Considerable uncertainty surrounds future spending performance. The potential of increasing unemployment and greater constraint across the economy will particularly impact discretionary retail categories. Businesses are being cautious with most stopping investment and hiring until there is more clarity.

Supply Chain. Retailers across most categories are finding it difficult to secure stock as manufacturing impacts during COVID are now having downstream impacts across the globe. Some suppliers decisively reduced production, while freight challenges and increased demand have all contributed to availability issues. This will affect trading performance and goodwill for businesses.

Reduced Opening Hours. Many of the CBD retail businesses remain operating on reduced hours as retailers look to reduce costs and respond to changes in demand brought about by more flexible working practices. This has resulted in a variable experience for shoppers with some stores (including larger retailers) now opening from 10 till 5 weekdays.

International Business. While international spendIng makes up only around 5% of revenue, the benefit of these customers to some categories will be particularly felt with the likely loss or significant reduction of cruise tourism this coming summer season. The loss of international business travellers and conventions is also likely to affect retail and hospitality businesses.

FIFO. Wellington has typically enjoyed a buoyant fly-in-fly-out customer base with domestic business and government trade supporting retail and hospitality demand. Increased teleworking, reduced air capacity and corporate/government travel-caps have reduced this audience - which is being felt by CBD businesses.

WOW. Wearable Arts is a big contributor to Wellington's retail and hospitality performance with consumers often saving for this event - and planning purchases around their visits. For some categories, spending is akin to Christmas levels. Smaller-scale events - planned in place of WOW, will help, however the loss of this season will definitely impact those in the apparel and hospitality sectors, this year.

--
: Chris Wilkinson
: Managing Director
: **First Retail Group Ltd**
: chris@firstretailgroup.com
: [redacted]
: Level 3, 44 Victoria Street, Wellington, New Zealand 6011

From:	BUS: Assurance
To:	Ollie Marchant
Subject:	FW: Urmila LGOIMA
Date:	Wednesday, 4 October 2023 12:04:29 pm

From: Chris Wilkinson <chris@firstretailgroup.com>
Sent: Friday, 2 October 2020 1:55 pm
To: Martin Rosevear <Martin.Rosevear@wcc.govt.nz>
Cc: Lorraine Nicholson <lorraine@firstretailgroup.com>
Subject: CBD Activation/Market Intelligence

Hi Martin,

It was great to talk earlier.

With Council considering how best we activate the CBD, we think its important to look beyond creative uses for prime, temporarily vacant sites. We considered an early response to that in proposals requested by Council a few weeks back, however, feel this could be further developed on, after discussions with the property sector

While creative uses create opportunities for artists, performances and other non-commercial activities, there are other solutions that could assist the CBD to develop differentiation in offer and experience by creating a conduit to wider audiences for emerging and artisan businesses. We know that these types of offers set the CBD apart, create succession within our commercial community and have strong economic and social outcomes.

Supporting the potential for short-term small-business uses creates greater interest and relevance for workers, visitors and residents and could be achieved with lower costs than other uses through a strategic plan and collaborations with property owners and sponsors.

There's potential this can happen without occupancy costs - just opex and that this could be something unique to Wellington. Independent strategy would address the methodology, rationale and delivery. That's essentially what we would suggest exploring.

Here's some detail on the market intel we shared earlier:

1. **Market Intelligence.** Talking with agents this week including Colliers, there is a feeling we could be staring at 20-30% vacancy of ground floor spaces within the next few years. This reflects leases coming up and not being renewed, chains reducing their representation in the CBD (many have multiple stores), banks each moving to one main branch only, business failures and continued vacancy of existing sites. We are already seeing these trends playing out.

2. **Responsive Shift.** Businesses are looking to follow consumers into the suburbs with CBD traders actively seeking sites and the potential that local centres could achieve strategic regeneration.

3. **Confidence.** H&M has decided now not to go ahead with their 3 storey store on Stewart Dawson's Corner, which will leave a major void that is unlikely to be filled. The frontage

(including the next-door building will be converted into 8 shopfronts for lease - however, there is little demand.

Chris

--

: Chris Wilkinson

: Managing Director

: **First Retail Group Ltd**

: chris@firstretailgroup.com

: [redacted]

We help organisations develop opportunity, drive performance & manage risk. Learn more about us at **www.firstretailgroup.com**

From:	BUS: Assurance
To:	Ollie Marchant
Subject:	FW: Response 4
Date:	Wednesday, 4 October 2023 12:05:06 pm
Attachments:	image003.png image006.jpg image007.png image004.png image005.png

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From: Chris Wilkinson <chris@firstretailgroup.com>
Sent: Tuesday, 2 May 2023 1:08 pm
To: Megan Hubscher <Megan.Hubscher@wcc.govt.nz>
Cc: Martin Rosevear <Martin.Rosevear@wcc.govt.nz>; Matthew Deng <Matthew.Deng@wcc.govt.nz>; Lorraine Nicholson <lorraine@firstretailgroup.com>
Subject: Re: DRAM and access sensitive merchants

Kia ora Megan - it's great to connect and good that you have identified this priority. While some businesses will be more affected than others, there will be a general wave of impact and in other areas we are working, the challenges are being felt equally by convenience-type businesses and destination-orientated traders.

Martin will be able to share more information on this, however the Marketview data lacks the granularity of smaller meshblocks and its categories can overlap high and lesser impact businesses - which creates difficulty in assessing like-for-like trading performance.

We suggest it is also necessary to consider the performance impacts of other types of business - beyond those most likely to experience impacts through changes in accessibility. Feedback from professional service businesses, others with appointment-based visitation, and their landlords, suggest that changes in use of roadspace and limitations in accessibility are current considerations for an increasing number of organisations important to their areas and communities.

Kind regards, Chris

On Tue, 2 May 2023 at 11:02, Megan Hubscher <Megan.Hubscher@wcc.govt.nz> wrote:

> Hi folks - and thanks Martin. Yep I'm the Comms Lead for the Cycle Network, so very interested in the data that you and Martin have been looking at.
>
> My initial question is what would it take to get hold of the data for the retailers that have been excluded, so we can look at 'overall' trends for the areas/time-periods in question. Related to this, I'd also be interested in knowing the average proportion of retail spend that the 'sensitive' retailers represent for their area in the given time periods.
>
> Cheers,
>
> **Megan Hubscher (she/her)**
> Principal Advisor | Communications and Engagement | Wellington City Council
> [redacted] **E** megan.hubscher@wcc.govt.nz | **W** Wellington.govt.nz
>
>

From: Martin Rosevear <Martin.Rosevear@wcc.govt.nz>
Sent: Tuesday, 2 May 2023 10:51 am
To: First Retail (Chris Wilkinson) <chris@firstretailgroup.com>; Matthew Deng <Matthew.Deng@wcc.govt.nz>
Cc: Megan Hubscher <Megan.Hubscher@wcc.govt.nz>
Subject: DRAM and access sensitive merchants

Gentlemen

Let me introduce you to Megan. She is a Comms specialist working with Claire Pascoe on Cycleways+. Chris: …. I have forwarded you work on Dixon St.

DRAM has caught her attention …. And in particular 'our' decision to group retailers according to their 'sensitivity' to access by vehicle and/or pavement due to works (cycleway, Wellington Water, parking spaces etc).

I have referred her to yourselves as our retail experts re the following allocations … please assist where you can.

ANZSIC	ANZSIC descriptor	Merchant #s	Spend Driver
H451100	Cafes and Restaurants	735	Hospitality/Entertainment
H451200	Takeaway Food Services	455	Hospitality/Entertainment
S951100	Hairdressing and Beauty Services	246	Destination
G425100	Clothing Retailing	216	Retail
G411000	Supermarket and Grocery Stores	182	Retail
G427900	Other Store-Based Retailing n.e.c.	171	Retail
H452000	Pubs, Taverns and Bars	144	Hospitality/Entertainment
G412900	Other Specialised Food Retailing	123	Destination
H440000	Accomodation	97	Destination
Q853100	Dental Services	85	Destination
G427100	Pharmaceutical, Cosmetic and Toiletry Goods Retailing	66	Retail
S941900	Other Automative Repair and Maintenance	59	Essential
G424100	Sport and Camping Equipment Retailing	59	Retail
Q851100	General Practice Medical Services	56	Destination
G425200	Footwear Retailing	51	Retail
Q859900	Other Health Care Services n.e.c.	50	Destination
G42730	Antique and Used Goods Retailing	46	Destination
R911100	Health and Fitness Centres and Gymnasia Operation	43	Destination
G424400	Newspaper and Book Retailing	43	Retail
G412300	Liquor Retailing	43	Retail
Q851200	Specialist Medical Services	41	Destination
G423100	Hardware and Building Supplies Retailing	41	Destination
G400000	Fuel Retailing	40	Retail
S953900	Other Personal Services	38	Destination

N722000	Travel Agency and Tour Arrangement Services	34	Destination
R911300	Sports and Physical Recreation Venues, Grounds and Facilities Operations	33	Destination
I462300	Taxi and Other Road Transport	32	Essential
G421400	Manchester and Other Textile Goods Retailing	31	Destination
R913900	Amusement and Other Recreation Activities n.e.c	30	Hospitality/Entertainment
Q853300	Physiotherapy Services	29	Destination
R911200	Sport and Physical Recreation Clubs and Sports Professionals	24	Destination
Q853200	Optometry and Optical Dispensing	24	Destination
G422100	Electrical, Electronic and Gas Appliance Retailing	22	Destination
G425300	Watch and Jewellery Retailing	22	Retail
G427400	Flower Retailing	22	Retail
S95311	Laundry and Dry-Cleaning Services	22	Destination
Q853900	Other Allied Health Services	19	Destination
Q853400	Chiropractic and Osteopathic Services	18	Destination
H451300	Catering Services	17	Destination
M697000	Veterinary Services	17	Destination
S941200	Automotive Body, Paint and Interior Repair	15	Essential
H453000	Clubs (Hospitality)	15	Destination
S942200	Electronic (except Domestic Appliance) and Precision Equipment Repairs	15	Retail
G392200	Tyre Retailing	15	Destination
I510100	Postal Services	14	Essential
L661100	Passenger Car Rental and Hiring	13	Destination
G425900	Other Personal Accessories Retailing	12	Retail
G412100	Fresh Meat, Fish and Poultry Retailing	11	Retail
I490000	Air and Space Transport	11	Essential
G421200	Floor Coverings Retailing	11	Destination
G424300	Toy and Game Retailing	9	Retail
J601000	Libraries and Archives	9	Destination
G421300	Houseware Retailing	9	Destination
J551300	Motion Picture Exhibition	9	Destination
S953300	Parking Services	8	Essential
S949100	Clothing and Footwear Repair	8	Retail
R891000	Museum Operation	8	Destination
S941100	Automotive Electrical Services	8	Essential
G422900	Other Electrical and Electronic Goods Retailing	7	Destination
R900100	Performing Arts Operation	7	Destination
G412200	Fruit and Vegetables Retailing	7	Retail
S942100	Domestic Appliance Repair and Maintenance	7	Destination
I482000	Water Passenger Transport	6	Essential
G422200	Computer and Computer Peripherals Retailing	6	Destination
S954000	Religious Services	6	Destination
G392100	Motor Vehicle Parts Retailing	6	Destination
G427200	Stationery Goods Retailing	6	Retail
S949900	Other Repair and Maintenance n.e.c.	5	Destination

G391100	Car Retailing	5	Destination
I510200	Courier Pick-up and Delivery Services	5	Essential
C161100	Printing	4	Destination
G426000	Department Stores	4	Retail
G424200	Entertainment Media Retailing	4	Hospitality/Entertainment
R900300	Performing Arts Venue Operation	4	Destination
Q852000	Pathology and Diagnostics Imaging Services	3	Destination
G423200	Garden Supplies Retailing	3	Destination
G424500	Marine Equipment Retailiing	2	Destination
R920200	Lottery Operation	2	Destination
G391200	Motor Cycle Retailing	1	Destination
S953400	Brothel Keeping and Prostitution Services	1	Destination
S942900	Other Machinery and Equipment Repair and Maintenance	1	Destination
R892200	Nature Reserves and Conservation Parks Operation	1	Destination
S953200	Photographic Film Processing	1	Destination
L661900	Other Motor Vehicle and Transport Equipment Rental and Hiring	1	Destination
I501000	Scenic and Sightseeing Transport	1	Hospitality/Entertainment
I462200	Urban Bus Transport (Including Tramway)	1	Essential

Martin Rosevear
Snr Adv (Economic focus) Research & Evaluation | Strategy, Policy & Research | Wellington City Council
[redacted] E martin.rosevear@wcc.govt.nz | W Wellington.govt.nz | |

From: Megan Hubscher <Megan.Hubscher@wcc.govt.nz>
Sent: Tuesday, 2 May 2023 10:14 am
To: Martin Rosevear <Martin.Rosevear@wcc.govt.nz>
Subject: RE: Selected merchants

Great – can I have Matthew and Chris's details please?

And can proceed with an example graph below where date and baseline are represented on the same % scale, with real data a proportion of the baseline.

And the one we discussed yesterday where we show the baseline and sample data movement over time against the data sets' average, where 0 = the average of the data set.

Thanks!

Megan Hubscher (she/her)
Principal Advisor | Communications and Engagement | Wellington City Council
[redacted] | **E** megan.hubscher@wcc.govt.nz | **W** Wellington.govt.nz

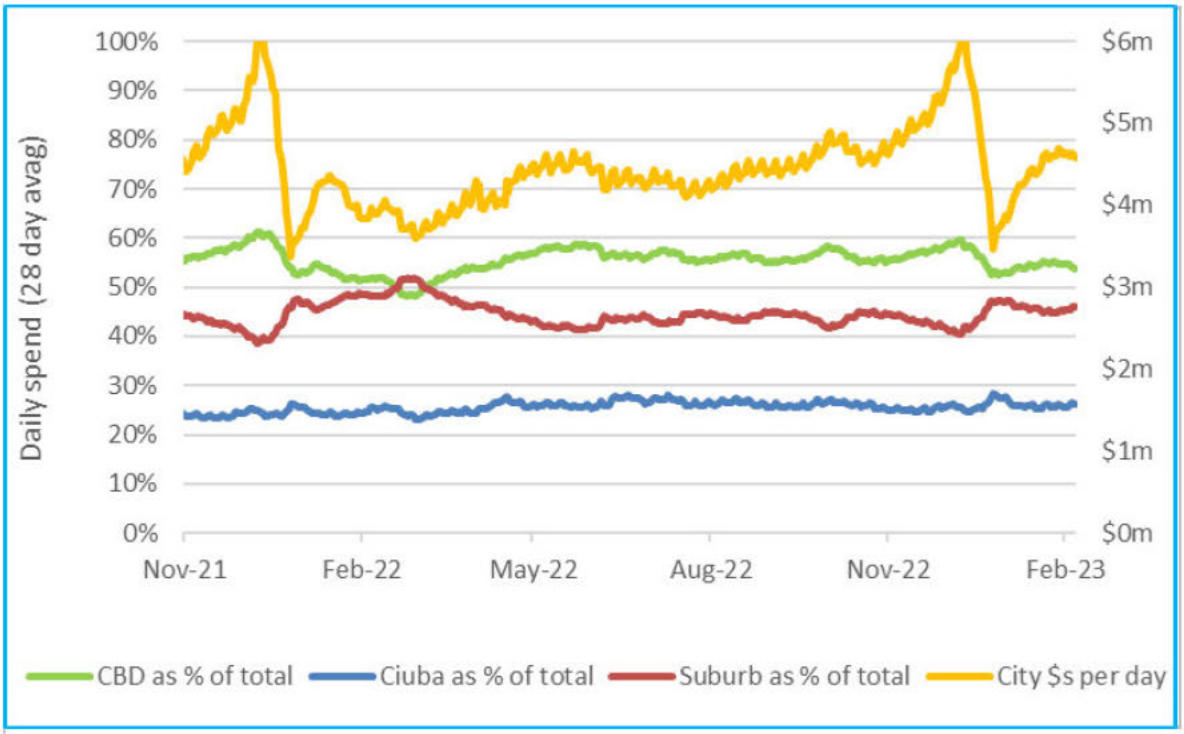
From: Martin Rosevear <Martin.Rosevear@wcc.govt.nz>
Sent: Tuesday, 2 May 2023 9:45 am
To: Megan Hubscher <Megan.Hubscher@wcc.govt.nz>
Subject: RE: Selected merchants

- Are we able to tell what proportion the monitored retailers are of the total retail value in the district? Ie if we averaged the value of the retailers that we're reporting on, and said 'these retailers represent 60% (for example) of the total retail value in the area, if we include destination and essential retailers'.

Not currently. We do not have spend data on the 'Destination' merchants. You should discuss with our retail experts: Matthew and Chris Wilkinson (Frist Retal).

- Regarding our discussion on how we represent the data against baseline trends. How about we plot the data in the same way you've done in this graph, where the base line would look like the 'Total' line, and the live data is represented as a proportion of it, as you've done for Cuba, Suburb and CBD in the example below:

Possible.



Megan Hubscher (she/her)
Principal Advisor | Communications and Engagement | Wellington City Council
[redacted] | E megan.hubscher@wcc.govt.nz | W Wellington.govt.nz

From: Martin Rosevear <Martin.Rosevear@wcc.govt.nz>
Sent: Tuesday, 2 May 2023 7:54 am
To: Megan Hubscher <Megan.Hubscher@wcc.govt.nz>
Subject: Selected merchants

Megan

Selected merchants are grouped as follows. 'Destination' merchants are excluded from the Benchmark groups (Suburban, CBD, Cuba) on the basis that they are:

1. booked up well in advance OR
2. that a bit of disruption would not stop a consumer from shopping there.

If there are issues you should raise them with Matthew and Christ Wilkinson ....

ANZSIC	ANZSIC descriptor	Merchant #s	Spend Driver
H451100	Cafes and Restaurants	735	Hospitality/Entertainment
H451200	Takeaway Food Services	455	Hospitality/Entertainment

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G427100	Pharmaceutical, Cosmetic and Toiletry Goods Retailing	66	Retail
S941900	Other Automative Repair and Maintenance	59	Essential
G424100	Sport and Camping Equipment Retailing	59	Retail
Q851100	General Practice Medical Services	56	Destination
G425200	Footwear Retailing	51	Retail
Q859900	Other Health Care Services n.e.c.	50	Destination
G42730	Antique and Used Goods Retailing	46	Destination
R911100	Health and Fitness Centres and Gymnasia Operation	43	Destination
G424400	Newspaper and Book Retailing	43	Retail
G412300	Liquor Retailing	43	Retail
Q851200	Specialist Medical Services	41	Destination
G423100	Hardware and Building Supplies Retailing	41	Destination
G400000	Fuel Retailing	40	Retail
S953900	Other Personal Services	38	Destination
N722000	Travel Agency and Tour Arrangement Services	34	Destination
R911300	Sports and Physical Recreation Venues, Grounds and Facilities Operations	33	Destination
I462300	Taxi and Other Road Transport	32	Essential
G421400	Manchester and Other Textile Goods Retailing	31	Destination
R913900	Amusement and Other Recreation Activities n.e.c	30	Hospitality/Entertainment
Q853300	Physiotherapy Services	29	Destination
R911200	Sport and Physical Recreation Clubs and Sports Professionals	24	Destination
Q853200	Optometry and Optical Dispensing	24	Destination
G422100	Electrical, Electronic and Gas Appliance Retailing	22	Destination
G425300	Watch and Jewellery Retailing	22	Retail
G427400	Flower Retailing	22	Retail
S95311	Laundry and Dry-Cleaning Services	22	Destination
Q853900	Other Allied Health Services	19	Destination
Q853400	Chiropractic and Osteopathic Services	18	Destination
H451300	Catering Services	17	Destination
M697000	Veterinary Services	17	Destination
S941200	Automotive Body, Paint and Interior Repair	15	Essential
H453000	Clubs (Hospitality)	15	Destination
S942200	Electronic (except Domestic Appliance) and Precision Equipment Repairs	15	Retail
G392200	Tyre Retailing	15	Destination
I510100	Postal Services	14	Essential
L661100	Passenger Car Rental and Hiring	13	Destination

G425900	Other Personal Accessories Retailing	12	Retail
G412100	Fresh Meat, Fish and Poultry Retailing	11	Retail
I490000	Air and Space Transport	11	Essential
G421200	Floor Coverings Retailing	11	Destination
G424300	Toy and Game Retailing	9	Retail
J601000	Libraries and Archives	9	Destination
G421300	Houseware Retailing	9	Destination
J551300	Motion Picture Exhibition	9	Destination
S953300	Parking Services	8	Essential
S949100	Clothing and Footwear Repair	8	Retail
R891000	Museum Operation	8	Destination
S941100	Automotive Electrical Services	8	Essential
G422900	Other Electrical and Electronic Goods Retailing	7	Destination
R900100	Performing Arts Operation	7	Destination
G412200	Fruit and Vegetables Retailing	7	Retail
S942100	Domestic Appliance Repair and Maintenance	7	Destination
I482000	Water Passenger Transport	6	Essential
G422200	Computer and Computer Peripherals Retailing	6	Destination
S954000	Religious Services	6	Destination
G392100	Motor Vehicle Parts Retailing	6	Destination
G427200	Stationery Goods Retailing	6	Retail
S949900	Other Repair and Maintenance n.e.c.	5	Destination
G391100	Car Retailing	5	Destination
I510200	Courier Pick-up and Delivery Services	5	Essential
C161100	Printing	4	Destination
G426000	Department Stores	4	Retail
G424200	Entertainment Media Retailing	4	Hospitality/Entertainment
R900300	Performing Arts Venue Operation	4	Destination
Q852000	Pathology and Diagnostics Imaging Services	3	Destination
G423200	Garden Supplies Retailing	3	Destination
G424500	Marine Equipment Retailiing	2	Destination
R920200	Lottery Operation	2	Destination
G391200	Motor Cycle Retailing	1	Destination
S953400	Brothel Keeping and Prostitution Services	1	Destination
S942900	Other Machinery and Equipment Repair and Maintenance	1	Destination
R892200	Nature Reserves and Conservation Parks Operation	1	Destination
S953200	Photographic Film Processing	1	Destination
L661900	Other Motor Vehicle and Transport Equipment Rental and Hiring	1	Destination
I501000	Scenic and Sightseeing Transport	1	Hospitality/Entertainment
I462200	Urban Bus Transport (Including Tramway)	1	Essential

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