Census of Businesses in Auckland's City Centre: January 2020 and Changes Since 2017

Ting Huang

September 2020

Technical Report 2020/018

Research and Evaluation Unit | RIMU

Auckland Council
Te Kaunihera o Tāmaki Makaurau

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Executive summary

Auckland's city centre is of strategic importance regionally and nationally. This is reflected in the Auckland Plan 2050 and the recently refreshed City Centre Masterplan, which sets out practical ways to develop the city centre so it can continue to thrive economically and cater for the needs of Auckland's diverse population. Understanding the structure and distribution of business activities in Auckland's city centre contributes to Auckland Council's ability to work with stakeholders to deliver positive outcomes.

This report presents findings from a census of businesses for the city centre, undertaken by Auckland Council's Research and Evaluation Unit (RIMU) in January 2020 (prior to the Covid-19 pandemic). It is a snapshot in time, and updates a similar census undertaken by RIMU in 2017. It focuses on the core business area within the city centre, where employment density is the highest.

The study area was divided into seven zones based on main streets or business areas: Skycity and Elliott, Lower Albert and Hobson, Commercial Bay, Central Queen Street Valley, High Street and Chancery, Shortland Street and Britomart (see Figure A, page iii).

For each meshblock within the study area, information on the use of space (e.g. retail, office, vacant etc.), name, address and main activities of businesses located in each building was recorded on a survey sheet. The census was limited to the inclusion of businesses or premises (including vacant) with publicly accessible information visible from the street and on signage in building foyers, therefore findings are indicative and may not be complete. Businesses were classified according to the Australian New Zealand Standard Industrial Classification 2006 (ANZSIC 06) by the research team.

It is perhaps useful to note that this census of businesses was undertaken while significant infrastructure works were underway in the city centre, including the City Rail Link project, and the development of the PWC Tower and the Commercial Bay retail centre. As mentioned above, it was also undertaken prior to the Covid-19 pandemic and associated economic downturn.

Findings

As at January 2020, there were 2827 businesses recorded in the study area. Over a third (35% or 976) of the businesses were in retail business premises (customer-facing),[1] and 62 per cent (1756) were based in offices. There was a concentration of businesses in high productivity service industries, as well as retail and food services industries which have

[1] For example, cafes, restaurants, takeaways, retail shops, supermarkets, grocery stores, premises used by businesses providing personal and household services (e.g. hairdressing and beauty services, laundry and dry-cleaning) and repair services (e.g. clothing and footwear repair, mobile phone and computer repair).

relatively low productivity.[2] The six main business types – Cafes and Restaurants (269), Legal Services (239), Finance (202), Clothing, Footwear and Personal Accessory Retailing (182), Takeaway Food Services (119), and Computer System Design and Related Services (107) – made up about 40 per cent of the businesses in the area.

Figure A: Building footprints and zones in the study area, as at 2019.

Source: Stats NZ; Auckland Council's geospatial database, GeoMaps

Businesses in the city centre were most concentrated in Central Queen Street Valley (1063 businesses or 38%). This zone had the highest shares of most business types, and about half of clothing, footwear and personal retailers in the study area were located here.

[2] This refers to labour productivity, and a common measure of this is GDP per worker. The level of GDP per worker varies between industries as the skill levels of workers and their inherent efficiency are different for different industries. Also, this is influenced by the different amounts of machinery, technology and land being used as production inputs in each industry.

This corresponds to the finding from council's earlier research in 2017 (Rohani and Lawrence 2017a) that retail businesses are concentrated on Queen Street with high walking connectivity. High Street and Chancery had the highest concentration of Cafes and Restaurants (approximately 25%), and the second largest number of businesses in Legal Services (45) and Architectural, Engineering and Technical Services (24). About a fifth of the area's businesses were more dispersed across Lower Albert and Hobson (208), Commercial Bay (202) and Britomart (184).

There were 81 fewer businesses recorded in 2020 compared to three years prior. A larger number of businesses had either disestablished or left the study area (912 businesses) than the number who had recently established or moved in (831 businesses). Across the different business types, clothing, footwear and personal accessory retailers (33 fewer), finance businesses (33 fewer) and legal services firms (21 fewer) experienced larger declines. In contrast, Takeaway Food Services saw the largest percentage increase (19% increase from 100) as there were more new takeaway businesses established since 2017 than those that closed down.

Zones that were closer to the construction sites of the City Rail Link and the Commercial Bay Redevelopment, such as Skycity and Elliott, Lower Albert and Hobson and Commercial Bay showed larger percentage reductions in their business counts (7%, 8% and 11% reduction respectively). This corresponded with larger increases in vacant business premises in these zones, especially in vacant retail premises (increases of 15, 24 and 7 respectively). A possible related factor could be the disruptions to local businesses caused by the construction works. In contrast, with a growing number of businesses in high productivity service industries, High Street and Chancery had 44 more businesses (11% more) in 2020 than in 2017. Almost two thirds of this increase came from Architectural, Engineering and Technical Services (12 more businesses), Management and Related Consulting Services (9 more businesses) and Finance (6 more businesses).

Conclusion

Auckland's city centre is a hub for high productivity industries, and a main location for retail and food services, with high business concentration in Central Queen Street Valley and High Street. There was, however, an apparent decline in business activities as more businesses had disestablished or left the city centre since 2017 than had established or moved in during that time. This was accompanied by a significant increase in vacant business premises in areas close to the City Rail Link construction sites.

Future iterations of this study will reveal further changes in the scale and composition of business activity in the city centre, and may show longer-term effects of the completed City Rail Link as well as impacts of the Covid-19 pandemic.

Supporting data dashboard

An interactive data dashboard – developed using Tableau by Andrew Price, Senior Growth Analyst, RIMU – is associated with this report. The dashboard contains three tabs showing:

- changes between the 2017 and 2020 censuses of businesses by study area zone, broad industry and business type (sub-industry), as well as changes in business locations
- businesses recorded in the 2017 census of businesses by broad industry and business type for each zone in the study area
- businesses recorded in the 2020 census of businesses by broad industry and business type for each zone in the study area.

The data dashboard will be available on Knowledge Auckland, www.knowledgeauckland.org.nz

Table of contents

List of figures

List of tables

1.0 Introduction

Auckland's city centre is an economic, transport and cultural hub for both the region and New Zealand. From 2009 to 2019, population in the city centre increased by over 60 per cent (from 22,000 to 35,790)[3] (Auckland Council, 2020). In the year ended March 2019, the city centre contributed almost 19 per cent of Auckland's gross domestic product (GDP) and seven per cent of the national GDP ($21 billion in 2019 dollar value). It had about a sixth of Auckland's total employment (15%, 138,708 jobs), with a productivity premium of 22 per cent compared to the Auckland average (GDP per worker $152,503 vs. $125,491).[4]

The density of population and concentration of economic activities in the city centre enables the formation of agglomeration economies. Knowledge and technical spillovers can be generated and shared across businesses, and people can access a wide variety of goods and services (Ahrend et al., 2014; Nunns, 2016; SGS Economics and Planning, 2012 & 2014). This helps achieve greater economic productivity and prosperity for Auckland, which is a goal of the Auckland Plan 2050 (the Plan), Auckland's long-term spatial plan (Auckland Council, 2018a). In supporting this, Auckland Council has developed a series of strategic directions in the City Centre Masterplan (Auckland Council, 2020) to make the city centre accessible for people and businesses. The Development Strategy of Auckland (Auckland Council, 2018b) has also projected targets for supply of business land and infrastructure for creating a growth-enabling business environment for the area. Understanding the structure and distribution of business activities in Auckland's city centre contributes to council's ability to work with stakeholders to deliver outcomes that enable the city centre economy to continue to thrive.

In early 2017, council's Research and Evaluation Unit (RIMU) undertook a census of businesses in Auckland's city centre. The study focused on the core business area of the city centre where the employment density (employees per hectare) is the highest (Rohani and Lawrence, 2017a). This was used as an input to a research study that investigated the relationship between pedestrian connectivity and economic productivity in Auckland's city centre (Rohani and Lawrence, 2017a & b).[5] The census of businesses collected information on the name, address, main activity and

[3] Stats NZ's population estimates for Auckland's city centre were revised in late 2019 following a review of the 2018 census data.

[4] Infometrics *2019 Regional economic profile for Auckland*, published on 31 January 2020.

[5] This research was a part of ADO's Business Case for Walking programme. It built on a 2014 Melbourne study by SGS (2014), which used effective job density (EJD) as a measure for the density and connectivity of jobs to examine the relationship between pedestrian connectivity and productivity.

use of space for each business in the buildings within the study area, providing a profile of business activities and land use.

Over the three years since the previous study, several completed and ongoing large infrastructure projects have taken place in the city centre (e.g. the Commercial Bay Redevelopment in downtown Auckland, the City Rail Link, High Street pedestrianisation trial). The city centre will be the venue for the America’s Cup in 2021. Also, the City Centre Masterplan (CCMP) has been recently refreshed. It is therefore useful to track changes in the distribution of business activities and land use in Auckland’s city centre over time. For this purpose, the census of businesses has been updated with data collected in January 2020. This report presents the main findings from 2020 and compares it with three years prior.[6]

This report contributes to the evidence base for council’s monitoring of the city centre’s business environment and land use, as well as the development of plans and programmes. Findings presented in this report are based on data collected before the Covid-19 virus pandemic which has drastically changed employment and the economy (Strateg.Ease, 2020).[7] Thus, results from the 2017 and 2020 censuses of businesses form a pre Covid-19 baseline, which can be used for future studies examining the impact of the pandemic.

[6] Data from the 2017 census of businesses have been revised, therefore results may differ from those previously reported.

[7] A recent economic report by Strateg.Ease (2020), released by Heart of the City, estimated that Auckland’s city centre could lose more than 12,400 jobs and $3.1 billion of GDP by March 2021, due to the impact of the Covid-19 pandemic.

2.0 Methodology

This section outlines the methodology used for this study. It describes the geographic definition of the study area and the data collected. Information on reporting of results is also provided.

2.1 Study area

Figure 1 shows the study area for both the 2017 and 2020 censuses of businesses. The area covers 33 census meshblocks between Quay Street and Wellesley Street in the central area of Auckland.[8] For analysis, the area has been divided into seven zones, based on the main streets or business areas. These are: Skycity and Elliott, Lower Albert and Hobson, Commercial Bay, Central Queen Street Valley,[9] High Street and Chancery, Shortland Street and Britomart.

Note that the zones used in this study do not align with the precincts defined by the Heart of the City.[10] The study area does not cover most of the Heart of the City's Arts Precinct[11] that is bounded by the Mayoral Drive, and it only extends to Hobson Street to the west. Also, the CCMP areas[12] were not used in the analysis as the study area is completely contained in CCMP's Queen Street Valley area.

See Figure 1 (page 4) for the meshblocks covered in each zone of the study area.

[8] The census meshblocks and CAUs have been replaced by Statistical Area 1 (SA1) and Statistical Area 2 (SA2) units since 2019. While acknowledging this change, the 2020 census of businesses continues to use the same geography as in 2017 so that results are comparable.

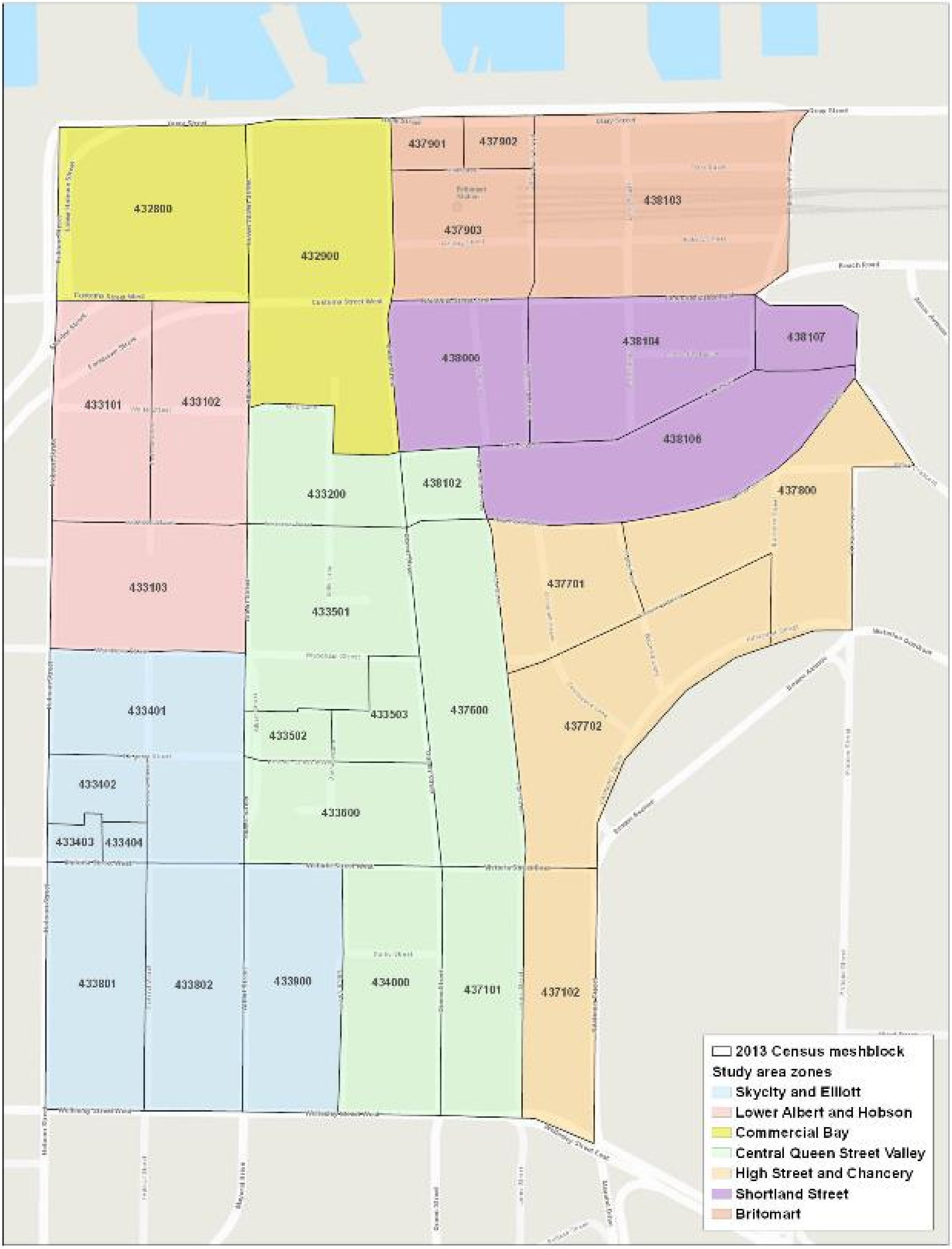
[9] Queen Street Valley, as defined in the Auckland Unitary Plan and City Centre Masterplan 2020, is the precinct centred on Queen Street and includes areas surrounding High, Lorne, O'Connell and Fort Streets.

[10] A map of the Heart of the City precincts is available at https://www.hotcity.co.nz/city-centre/city-centre-precincts.

[11] Around Mayoral Drive and sections of Lorne Street and Kitchener Street between Victoria Street West and Wellesley Street West.

[12] The CCMP areas include Uptown, Karangahape, West Stitch, Queen Street Valley, Learning Quarter, West Waterfront, Central Waterfront and East City. More details on the geographic coverage of each of those areas can be found on the CCMP's website at https://aucklandccmp.co.nz/explore-the-city-centre-masterplan-area/.

Figure 1: Meshblocks in each zone of the study area



Source: Stats NZ

2.2 Data collected

Data collection for the 2020 census of businesses took place between December 2019 and January 2020, which was a similar time of the year to the 2017 study. Information was collected on businesses and other types of premises by physical observation surveying. The surveys were undertaken at the building footprint level. Building footprints are the outlines that define the extent of permanent building or structures, which are captured from high resolution aerial photography (see Figure 2). It is considered the finest and most suitable geographic scale for aggregating economic, demographic and geospatial data (Rohani and Lawrence, 2017a).

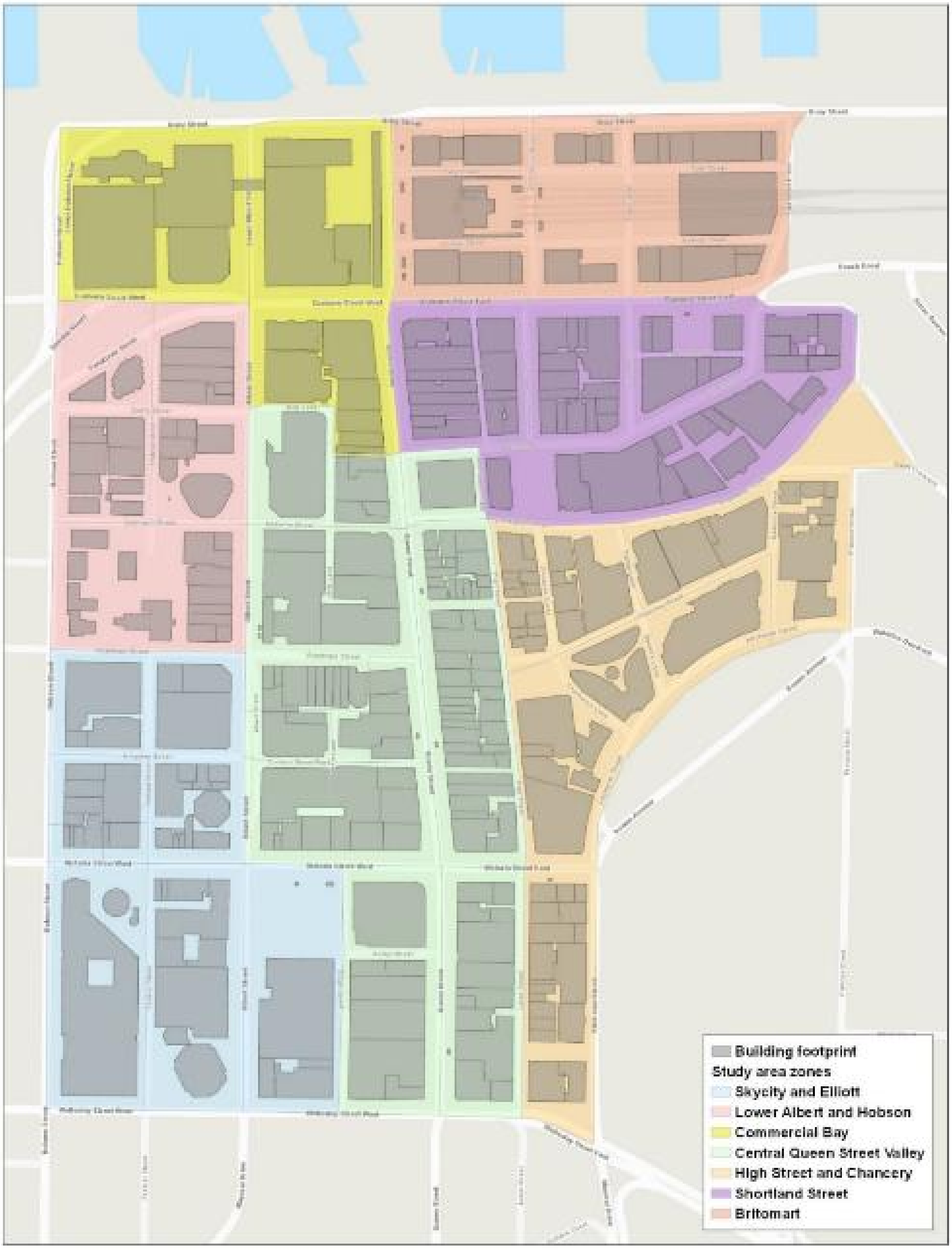
For each meshblock within the study area, information on the use of space (e.g. retail, office, vacant etc.), name, address and main activities of businesses located in each building was recorded on a survey sheet. The surveys were limited to the inclusion of businesses or premises (including vacant) with publicly accessible information visible from the street and on signage in building foyers.[13] For those commercial buildings that had a business directory board at the foyer, data was collected by taking photos of the directory, and information from the photos was entered afterwards. Additional information was also recorded if there were any buildings or premises under construction or redevelopment.

Primary data recorded from the surveys were then entered into a spreadsheet file. Secondary sources such as Google Search, Zomato Restaurant Finder and Ministry of Business, Innovation and Employment's (MBIE) New Zealand Companies Register were used in data entry to verify the address and business activity information recorded on the survey sheets. The recorded businesses were then coded with the appropriate industry classifications (business type) based on their main activities.[14] In both 2017 and 2020, coding was undertaken by the project team. The classification of businesses by industry may be subject to slight differences than the classifications used in Stats NZ's Business Demographics data.

[13] The buildings covered in the study area are a mix of residential, commercial and public buildings. Some buildings are specifically of one use, many are of mixed-use, for example, a mix of retail premises and offices. Mobile takeaway kiosks and uncovered car parks were also collected in the count.

[14] The business types contain a mixture of ANZSIC (Australian and New Zealand Industry Classification) industry classifications ranging from 1-digit to 4-digit.

Figure 2: Building footprints within each zone in the study area, as at 2019



Source: Stats NZ; Auckland Council’s geospatial database, GeoMaps

2.3 Reporting

Results in this report are presented by the seven zones described earlier. This is considered a more suitable approach than reporting by individual street as they give a better spatial context.

It is important to note that the zones are not equal in their size and building density. As shown in Table 1, the land area, building footprint area, and building footprint-to-land area vary across zones. Central Queen Street Valley is the largest with regard to land area and building footprint coverage (about a quarter of the total land and building footprint area), and it has the greatest building density (building footprint-to-land area ratio 0.61).

Table 1: Land area and building footprint area in the study area by zone

Zone	**Land area (m^2)**	**Share of total land area (%)**	**Building footprint area (m^2)**	**Share of total building footprint area**	**Building footprint-to-land area ratio (building density)**
Commercial Bay	59,748	11	34,070	13	0.57
Lower Albert and Hobson	52,524	10	21,046	8	0.40
Skycity and Elliott	88,469	17	45,888	17	0.52
Central Queen Street Valley	120,777	23	73,298	27	0.61
High Street and Chancery	79,462	15	41,040	15	0.52
Shortland Street	66,512	13	34,822	13	0.52
Britomart	55,819	11	22,350	8	0.40
Total study area	**523,310**	**100**	**272,515**	**100**	**0.52**

Source: Author's estimates based on Auckland Council's geospatial data.

The rest of this report is structured as follows:

- Section 3 describes results for the study area as a whole, including the number of businesses, composition of industries and business types and spatial distribution.
- Section 4 analyses the structural and spatial distribution of businesses for the main broad industries identified in the study area.
- Section 5 presents results by zone, covering aspects such as the number of businesses, use of business space and the composition of main business types.
- Section 6 examines changes in vacant business premises and identifies any changes in business locations, disestablishments and establishments of businesses that may have occurred between 2017 and 2020.
- Section 7 provides concluding remarks.

3.0 Results for the study area as a whole

This section presents the headline results for the study area as a whole. This includes the distribution of businesses in the study area by industry, by business type and by each of the seven zones. A breakdown of use of business premises is also presented. Results from the 2020 study are compared with data for 2017.

3.1 Number of businesses and use of space

As at January 2020, a total of 3047 premises were counted in the study area, and most (93%) were in use by businesses. Only five per cent of the recorded counts were empty premises or space (e.g. abandoned or vacant buildings, vacant land), or vacant business premises (88 vacant retail and 75 vacant offices). The remainder were buildings or premises under construction (16 or 1% of total) and in residential use (37 or 1%).

Of the 2827 businesses recorded, over a third (35% or 976) were based in retail business premises,[15] and 62 per cent (1756) were in offices. Accommodation/ hotels and car park premises each constitute one per cent of the total (33 and 23 respectively).

There were 81 fewer businesses (3% decrease) recorded in the area in 2020 compared to three years prior (2908 businesses) (see Table 2). The number of businesses in retail premises reduced by three per cent (28 fewer businesses), and there were 55 fewer businesses based in offices (3% decrease) in 2020 than in 2017.

Table 2: Number of businesses recorded by type of premise, 2020 compared to 2017

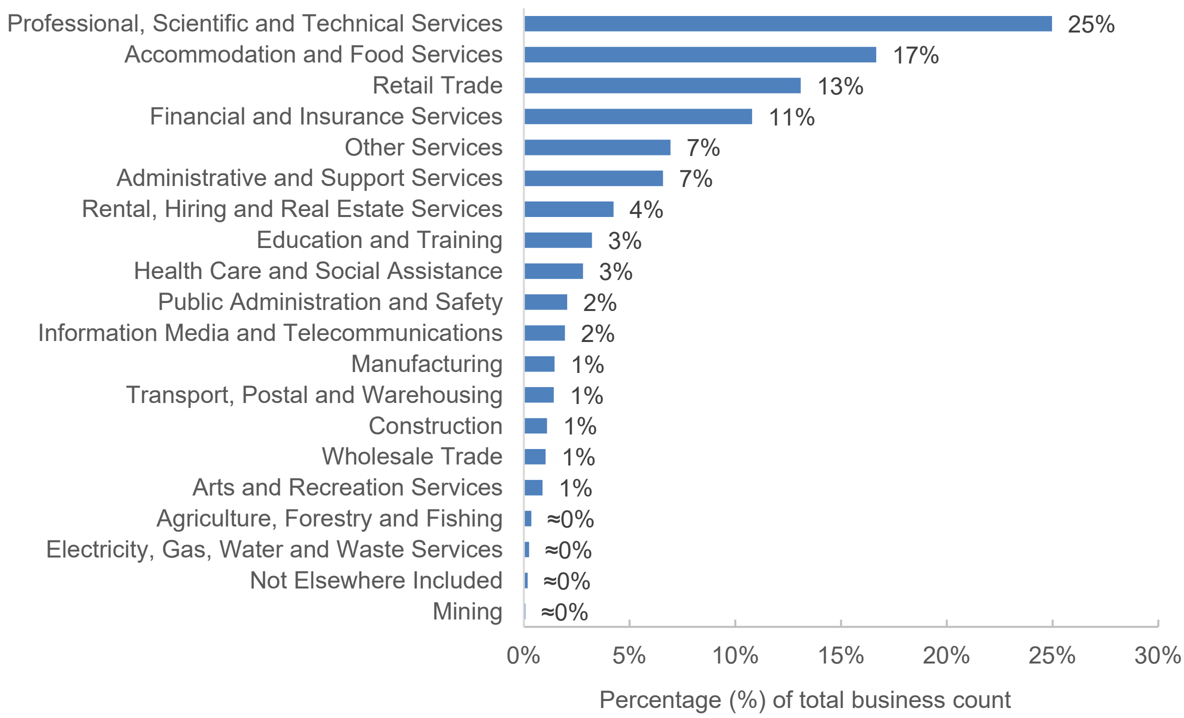
Type of premise	2020		2017		Change 2017-2020	% change 2017-2020
	Count	%	Count	%		
Retail	976	35	1004	35	-28	-3
Office	1756	62	1811	62	-55	-3
Bank/postal	11	0	14	0	-3	-21
Accommodation/hotel	33	1	30	1	3	10
Car park	23	1	23	1	0	0
All other business space use	28	1	26	1	2	13
Total business count	**2827**	**100**	**2908**	**100**	**-81**	**-3**

[15] This can include space used by cafes, restaurants, takeaways, retail shops, supermarkets, grocery stores, premises providing services such as hairdressing, beauty services, laundry and dry-cleaning, massage, mobile and computer repair, clothing and footwear repair.

3.2 Composition of business industries and types

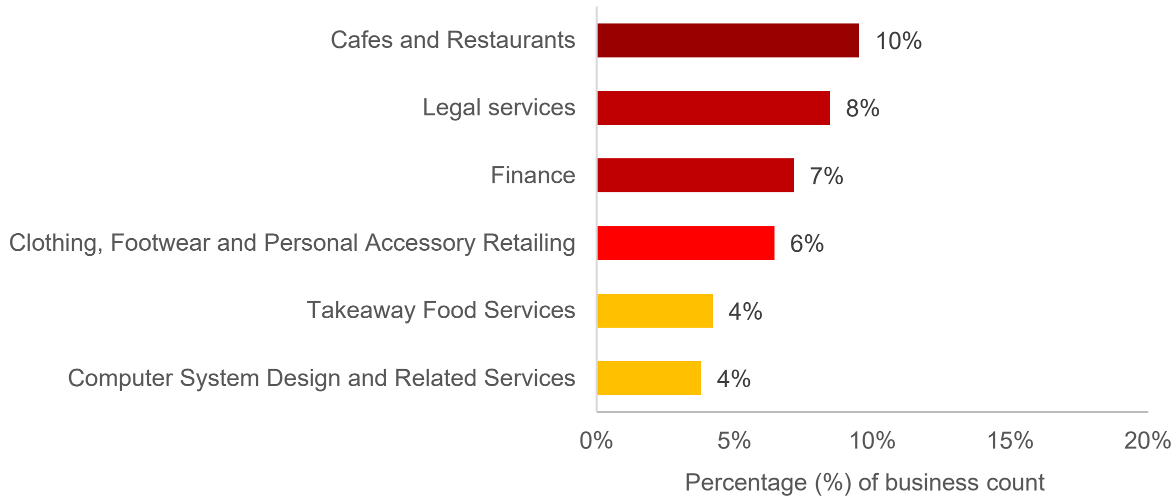
The study area is home to a range of industries. The breakdown of businesses by broad industry under the Australian and New Zealand Industry Classification (i.e. 1-digit ANZSIC industry) shows that, as at January 2020, over a third (36%) of the businesses in the area were associated with two knowledge-intensive industries, namely Professional, Scientific and Technical Services (a quarter of the total business count or 706 businesses), and Financial and Insurance Services (11% or 305 businesses). Accommodation and Food Services, and Retail Trade, were the second and third largest industries, accounting for 17 per cent (471 businesses) and 13 per cent (370 businesses) of the total business count respectively.

Figure 3: Number of businesses in the study area by broad industry (%), January 2020 (n=2827)



When analysed by further industry breakdown, it can be seen that the six main business types in the area in 2020 were Cafes and Restaurants (269 businesses), Legal Services (239), Finance[16] (202), Clothing, Footwear and Personal Accessory Retailing (182), Takeaway Food Services (119), and Computer System Design and Related Services[17] (107). They collectively made up two fifths of the businesses recorded in 2020.

Figure 4: Six main business types in the study area (%), 2020 (n=2827).



Data from the 2017 census of businesses showed a similar composition of industries and business types. However, some changes were noted:

- The number of businesses associated with Retail Trade, and Financial and Insurance Services industries decreased by eight per cent from their count in 2017 (from 402 and from 331 respectively). This was mostly driven by reductions in businesses in Finance (33 or 15% fewer businesses), and Clothing, Footwear and Personal Accessory Retailing (33 or 14% fewer businesses).
- As there were 19 more businesses (19% more) in Takeaway Food Services in 2020 compared to 2017, share of the Accommodation and Food Services broad industry increased by two percentage points (increase of 22 or 5% more businesses).

[16] Some examples are banks, businesses engaged in foreign exchange, money lending, financing.
[17] These are businesses providing expertise in the field of information technologies (IT) such as writing, modifying, testing or supporting software to meet the needs of a particular consumer; or planning and designing computer systems

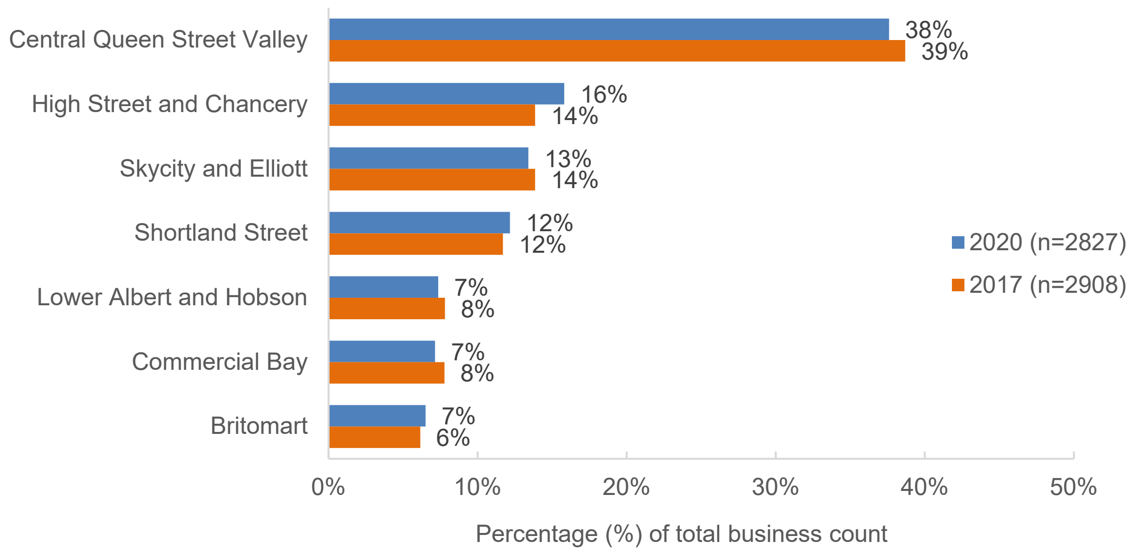
A full list of the business types under each broad industry and the associated number of businesses recorded in 2017 and 2020 is provided in the Appendix.

3.3 Distribution of businesses by zone

As at January 2020, over half (54%) of the businesses in the study area were located in Central Queen Street Valley (1063 businesses or 38%) and High Street and Chancery (447 businesses or 16%). The Lower Albert and Hobson zone (208 businesses), Commercial Bay (202 businesses) and Britomart (184 businesses) collectively accounted for about a fifth (21%) of the area's businesses. It is not surprising to find that Central Queen Street Valley had the highest concentration of businesses, given its larger size and higher building density compared to other zones (refer to Table 1).

High Street and Chancery showed the biggest growth in business numbers between 2017 and 2020. With 44 more businesses, it became the zone with the second largest business number by 2020. Central Queen Street Valley continued to have the highest concentration of businesses though the count reduced by 62. Reductions in businesses located in zones such as Skycity and Elliott (reduction of 7% or 29 businesses), Lower Albert and Hobson (reduction of 8% or 19 businesses) and Commercial Bay (reduction of 11% or 24 businesses) could be related to the disruptions from major construction projects nearby, such as the City Rail Link and Commercial Bay Redevelopment.

Figure 5: Business count by zone (%), 2020 and 2017



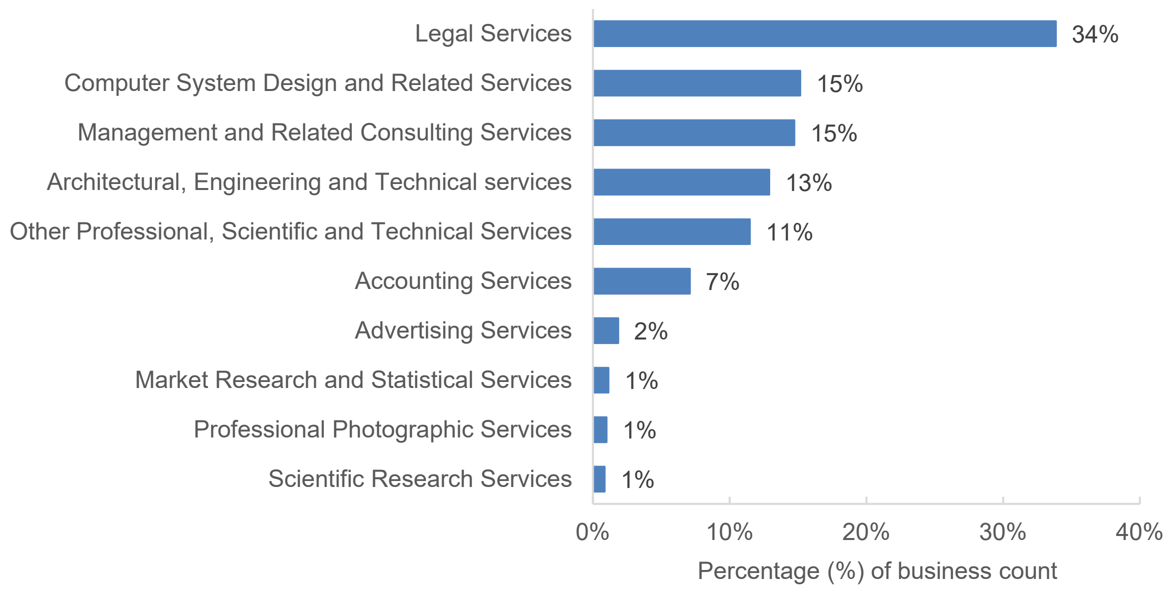
4.0 Distribution of main business industries and types

This section presents spatial analysis of the four main broad industries identified in Section 3.2 (see Figure 3) – namely Professional, Scientific and Technical Services, Accommodation and Food Services, Retail Trade, and Financial and Insurance Services. Spatial distribution of the main business types within those industries is also presented.

4.1 Professional, Scientific and Technical Services

Businesses in the Professional, Scientific and Technical Services category accounted for a quarter of all businesses in our census (706 in 2020 and 702 in 2017). Within this industry sector, Legal Services, Computer System Design, Management and Related Consulting Services, and Architectural, Engineering and Technical Services were the four main business types. In 2020, they collectively made up over three quarters (77%) of the industry's total business count in the area. (Figure 6 and Table 3).

Figure 6: Professional, Scientific and Technical Services by business type (%), 2020 (n=706)



Although Legal Services was the largest sub-industry, the number of businesses recorded decreased by 21 between 2017 and 2020, resulting in a three percentage-point reduction in its share (Table 3).

Table 3: Main business types within Professional, Scientific and Technical Services, 2020 compared to 2017

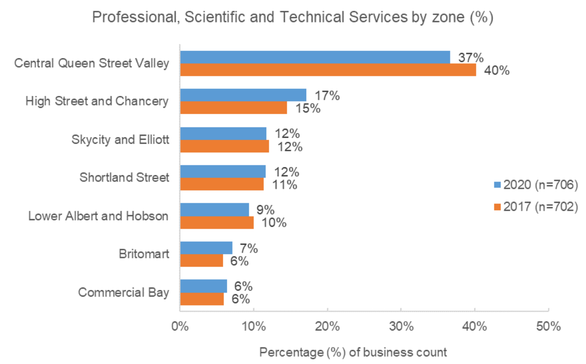
Business type	2020		2017		Change 2017-2020	% change 2017-2020
	Count	%	Count	%		
Legal Services	239	34	260	37	-21	-8
Computer System Design and Related Services	107	15	101	14	6	6
Management and Related Consulting Services	104	15	98	14	6	6
Architectural, Engineering and Technical Services	91	13	83	12	8	10
Professional, Scientific and Technical Services total	**706**	**100**	**702**	**100**	**4**	**1**

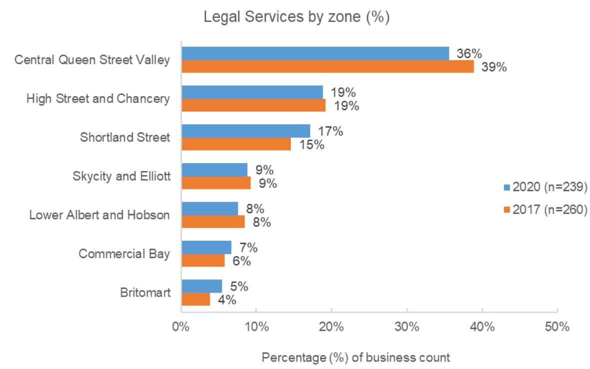
Businesses in Professional, Scientific and Technical Services were most concentrated in Central Queen Street Valley, with almost 40 per cent located in this zone. This was followed by the High Street and Chancery zone, and the Skycity and Elliott zone (Figure 7).

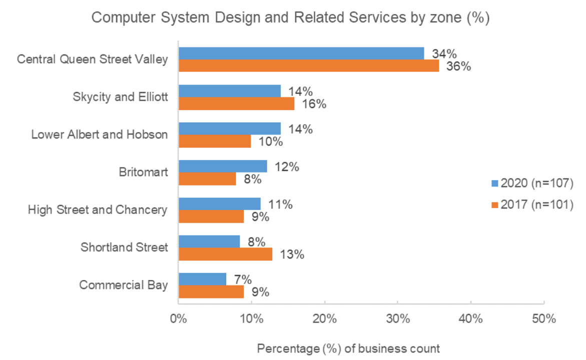
Some variations in the industry's distribution across zones were also observed:

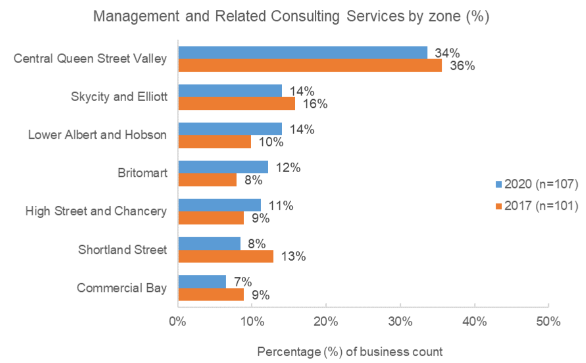
- High Street and Chancery and Shortland Street had higher shares of Legal Services businesses than Skycity and Elliott, Lower Albert and Hobson, Commercial Bay and Britomart.
- Shortland Street's share of Computer System Design and Related Services decreased by five percentage points (from 13%) between 2017 and 2000 as the count halved.
- A third or more businesses in Management and Related Consulting Services businesses were located in High Street and Chancery, and Skycity and Elliott. However, High Street and Chancery's share of this business type increased to almost a quarter (24%) as it had 56 per cent more (9 more) Management and Related Consulting businesses in 2020 than in 2017.
- The share of Architectural, Engineering and Technical Services located in High Street and Chancery increased to over a quarter (26%) as the count doubled between 2017 and 2020 (from 12 businesses). This contrasts with the 10 percentage-point decrease (from 39%) in the share located in Central Queen Street Valley.

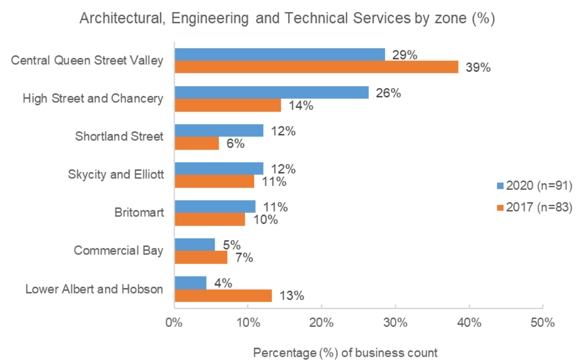
Figure 7: Main business types in Professional, Scientific and Technical Services by zone (%), 2020 and 2017











4.2 Accommodation and Food Services

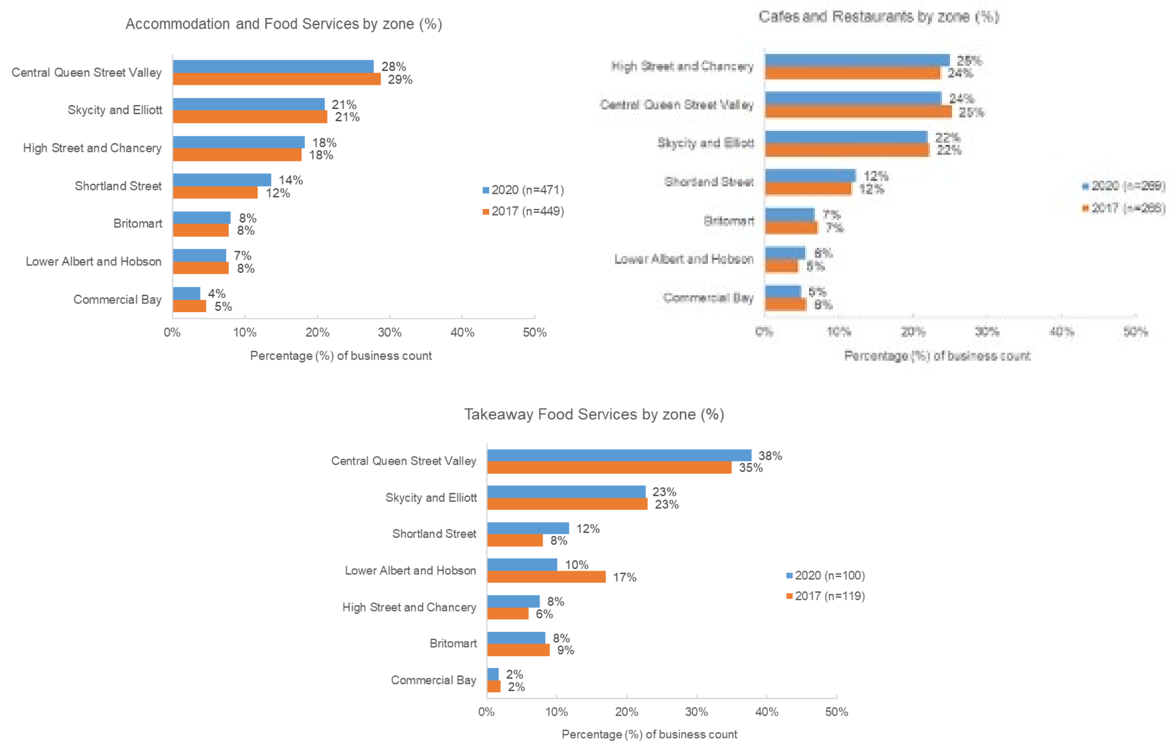
About six in 10 businesses in Accommodation and Food Services in the city centre were Cafes and Restaurants. This was followed by Takeaway Food Services businesses,[18] which made up a quarter of the industry's business count in the area in 2020.

Almost three in 10 businesses in the Accommodation and Food Services industry were located in Central Queen Street Valley. However, distribution patterns vary across the sub-industries. For example, both Central Queen Street Valley and High Street and Chancery had about a quarter of the cafes and restaurants in 2017 and 2020 (Figure 8).

From 2017 to 2020, the share of Takeaway Food Services businesses in Central Queen Street Valley further increased and the share in the Lower Albert and Hobson zone decreased. This was associated with a 32 per cent increase (10 more businesses) and a 29 per cent decrease (5 fewer businesses) in takeaways located in these two zones respectively. Shortland Street's share of Takeaway Food Services also increased by four percentage points (from 8%) as it had six more takeaways (75% increase from 8) in 2020 than in 2017.

[18] Takeaway Food Services mainly engage in providing food services ready to be taken away for immediate consumption. Customers order or select items and pay before eating. Food is either consumed on the premises in limited seating facilities or taken away by the customer or delivered. Unlike Cafes and Restaurants, which mainly provide food and non-alcoholic beverage services for consumption on the premises. Customers generally order and area served while seated. Stats NZ's Classification Code Finder tool for ANZSIC Industry Classification provides more details (http://archive.stats.govt.nz/tools_and_services/ClassificationCodeFinder/ClassificationCodeHierarchy.aspx?classification=4894)

Figure 8: Main business types in Accommodation and Food Services by zone, 2020 compared to 2017.



4.3 Retail Trade

About half of the Retail Trade businesses in the study area were clothing, footwear and personal accessory retailers (215 businesses in 2017 and 182 businesses in 2020).

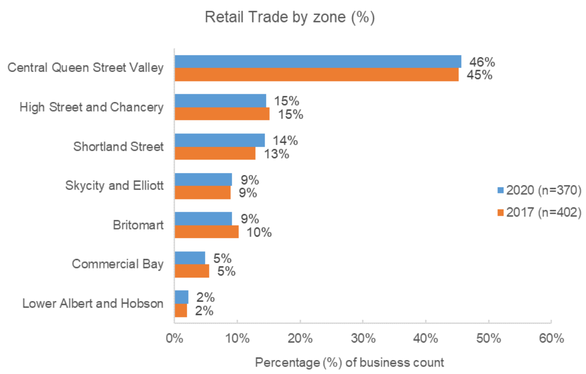
Businesses in Retail Trade were most concentrated in Central Queen Street Valley, and approximately half of the Clothing, Footwear and Personal Accessory Retailing businesses were located in this zone. This corresponds to the finding from council's earlier research on pedestrian connectivity (Rohani and Lawrence, 2017a). The study found that retail businesses are concentrated on Queen Street with high walking connectivity,[19] and this is likely to reflect the importance of accessibility and visibility to customers for retail businesses.

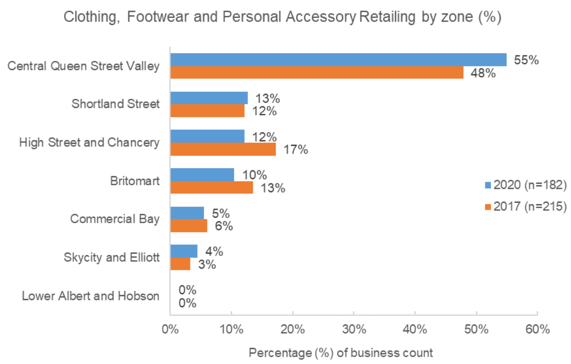
Some changes in the distribution of clothing, footwear and personal accessory retailers across the other six zones were also observed (Figure 9). From 2017 to 2020, High Street and Chancery and Britomart experienced larger decreases (15

[19] This was measured by the walking distance and travel time between jobs, incorporating traffic signal delays, pedestrian path types and deviations from a direct path. Rohani and Lawrence (2017a) provides more technical details on how this is calculated.

fewer businesses and 10 fewer businesses respectively) compared to the other zones, corresponding to a five percentage-point decrease (from 17%) and three percentage-point decrease (from 13%) in their shares respectively.

Figure 9: Main business type in Retail Trade by zone (%), 2020 compared to 2017.





4.4 Financial and Insurance Services

Over two thirds of the businesses within the Financial and Insurance Services industry were in the Finance sub-industry (203 in 2020 and 235 in 2017). However, only the Auxiliary Finance and Insurance Services sub-industry[20] experienced growth between 2017 and 2020 (a 71% increase from 31 businesses). The share of this business type increased to 16 per cent (Table 4 below).

Table 4: Business types within Financial and Insurance Services, 2020 compared to 2017.

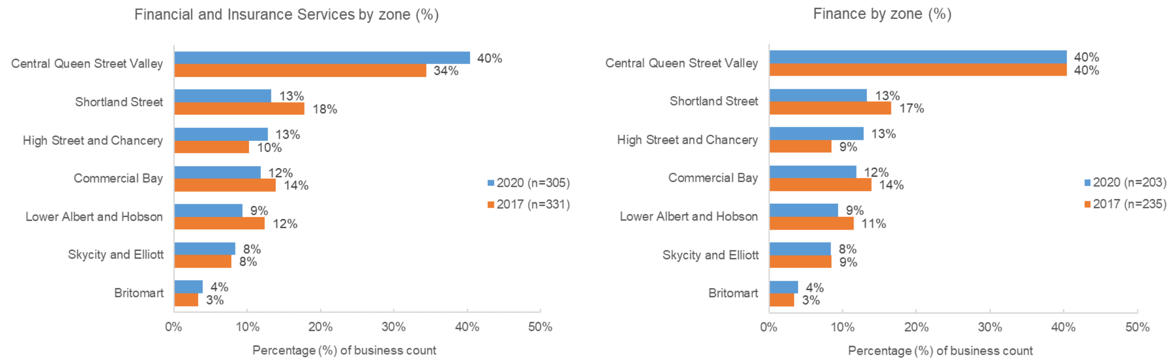
Business type	2020		2017		Change 2017-2020	% change 2017-2020
	Count	%	Count	%		
Finance	203	67	235	71	-32	-14
Insurance and Superannuation Funds	49	17	65	20	-16	-25
Auxiliary Finance and Insurance Services	53	16	31	9	22	71
Total Financial and Insurance Services	**305**	**100**	**331**	**100**	**-26**	**-8**

[20] Some examples are financial asset broking, portfolio investment management services, superannuation fund management service, insurance broking service.

Central Queen Street Valley had more than a third of the businesses in the Financial and Insurance Services category. This was followed by the Shortland Street zone, but with lower share observed in 2020 (13% compared to 18%).

The distribution of the industry’s businesses became slightly more dispersed between 2017 and 2020. This was largely due to the growth in the number located in High Street and Chancery. With 30 per cent more Finance businesses (from 20) in 2020 than in 2017, the zone’s share in this business type and the broad industry increased by four percentage points (from 9%) and by three percentage points (from 10%) respectively. Shortland Street became less concentrated with Finance businesses as the number located in this zone decreased by 31 per cent (from 39 in 2017 to 27 in 2020).

Figure 10: Main business type in Financial and Insurance Services by zone (%), 2020 compared to 2017



5.0 Results by zone

This section summarises results from the spatial analysis, including the number of businesses, use of business premises and the main business types in each zone of the study area.

5.1 Number of businesses

There was an overall decrease in the number of businesses counted in the 2020 census of businesses compared to 2017, but with similar distribution across the zones (Table 5).

Central Queen Street Valley experienced the largest reduction in number (62 fewer businesses from 1125) between 2017 and 2020. However, proportionately, reductions were larger for zones that are closer to the construction sites of the City Rail Link (Skycity and Elliott, Lower Albert and Hobson) and Commercial Bay Redevelopment (Commercial Bay). In particular, Commercial Bay experienced the largest percentage reduction, with 11 per cent fewer (24 fewer) businesses observed in 2020 than three years prior. In comparison, High Street and Chancery had a notable increase of 44 businesses (11% increase from 404 businesses).

Table 5: Number of businesses by zone, 2020 compared to 2017

Zone	2020		2017		Change 2017-2020	% change 2017-2020
	Count	%	Count	%		
Central Queen Street Valley	1063	38	1125	39	-62	-6
High Street and Chancery	447	16	403	14	44	11
Skycity and Elliott	379	13	408	14	-29	-7
Shortland Street	344	12	340	12	4	1
Lower Albert and Hobson	208	7	227	8	-19	-8
Commercial Bay	202	7	226	8	-24	-11
Britomart	184	7	179	6	5	3
Total study area	**2827**	**100**	**2908**	**100**	**-82**	**-3**

5.2 Businesses in retail and office premises

A higher proportion of businesses were based in offices than in retail space. Especially, businesses in the Lower Albert and Hobson zone and Commercial Bay were predominantly located in offices. High Street and Chancery and Britomart had higher proportions of businesses based in retail premises (Table 6).

From 2017 to 2020, the number of businesses in either retail or office premises decreased in zones including Skycity and Elliott, Lower Albert and Hobson, Commercial Bay and Central Queen Street Valley. However, for High Street and Chancery, the proportion based in offices rose to almost 60 per cent as the recorded number increased by 45 (from 217).

Table 6: Businesses based in retail space, offices and other types of business space by zone, 2020 compared to 2017

Zone	Business space type	2020		2017		Change 2017-2020	% change 2017-2020
		Count	%	Count	%		
Central Queen Street Valley	Retail	368	35	386	34	-18	-5
	Office	671	63	710	63	-39	-5
	Other[1]	24	2	29	3	-5	-17
High Street and Chancery	Retail	169	38	172	43	-3	-2
	Office	262	59	217	54	45	21
	Other	16	4	14	2	2	14
Skycity and Elliott	Retail	145	38	146	36	-1	-1
	Office	217	57	246	60	-29	-12
	Other	17	4	16	4	1	6
Shortland Street	Retail	133	39	123	36	10	8
	Office	193	56	201	59	-8	-4
	Other	18	5	16	5	2	13
Lower Albert and Hobson	Retail	45	22	47	21	-2	-4
	Office	155	75	174	77	-19	-11
	Other	8	4	6	3	2	4
Commercial Bay	Retail	41	20	53	23	-12	-23
	Office	155	77	165	73	-10	-6
	Other	6	3	8	4	-2	-25
Britomart	Retail	75	41	77	43	-2	-3
	Office	103	56	98	55	5	5
	Other	6	3	4	2	2	50

Note 1: This includes all other types of business premises as listed in Table 2

5.3 Main business types

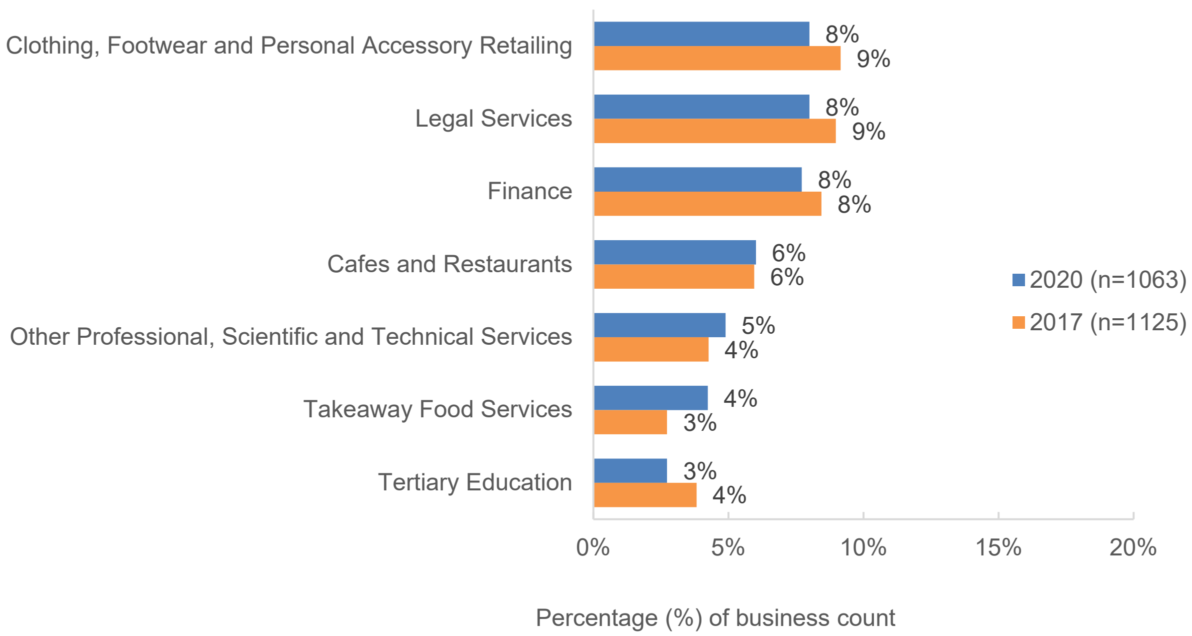
Figures 11 to 17 outline the main business types for each of the seven zones, and how the composition changed between 2017 and 2020.

5.3.1 Central Queen Street Valley

Given Central Queen Street Valley's high shares of Clothing, Footwear and Personal Accessory Retailing, Legal Services, Finance, and Cafes and Restaurants (refer to Section 4.0), it is not unexpected to find these as four of the main business types in this zone. Collectively they contained about 30 per cent of the businesses located here.

Central Queen Street Valley was the main location for businesses providing Other Professional, Scientific and Technical Services (48 in 2017 and 52 in 2017). About two thirds of the Tertiary Education businesses in the study area (43 in 2020 and 29 in 2017) were also located here. However, by 2020, Takeaway Food Services replaced Tertiary Education as one of the six largest business types in the zone. Proportionately, these two business types in Central Queen Street Valley experienced the largest increase (a 29% increase from 35 businesses) and decrease (a 33% decrease from 43 businesses) respectively.

Figure 11: Main business types in Central Queen Street Valley zone, 2020 compared to 2017

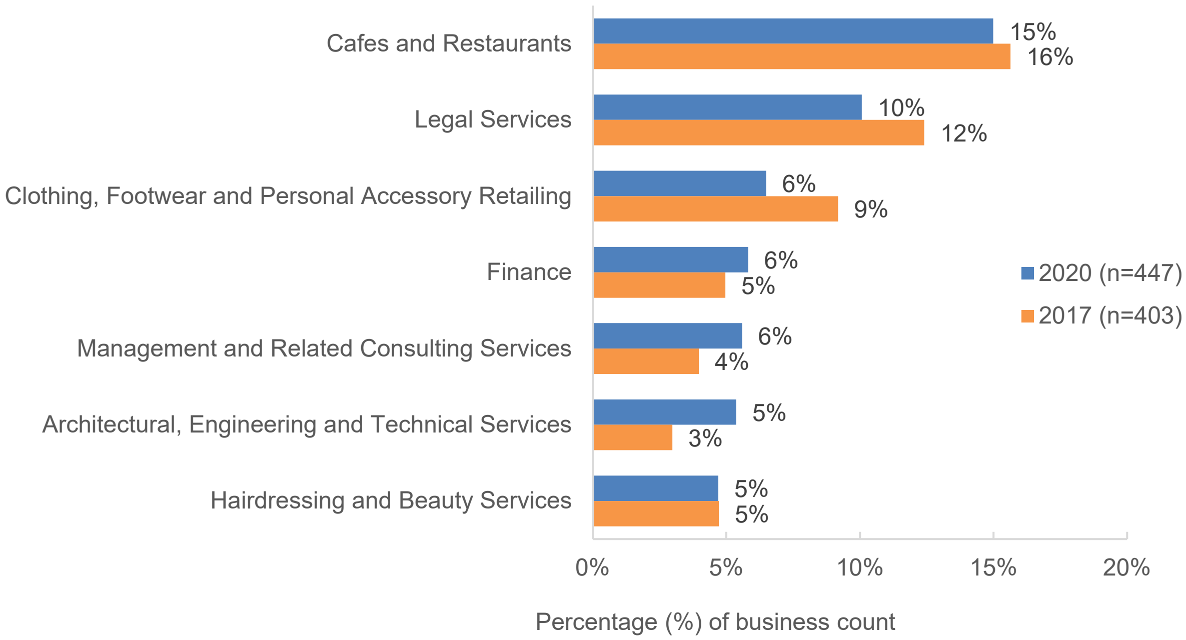


5.3.2 High Street and Chancery

Due to the high concentration of Cafes and Restaurants in High Street and Chancery, they were also the largest type of business in the zone.

Between 2017 and 2020, the composition of the main business types in the zone were shifting to those that tend to base in offices. In 2017, three in 10 of the businesses located in High Street and Chancery were Cafes and Restaurants (63 businesses), Clothing, Footwear and Personal Accessory Retailing (37 businesses) or Hairdressing and Beauty Services (19 businesses), which all tend to use retail premises. This compared to 20 per cent in Legal Services (50 businesses), Finance (20 businesses) and Management and Related Consulting Services (16 businesses), which use offices for business operation. By 2020, as Architectural, Engineering and Technical Services located in High Street and Chancery doubled (from 12 businesses), it became the sixth largest business type in the zone. The shares of Management and Related Services, and Finance also increased slightly as they experienced larger increases in number (nine and six more businesses respectively) compared to most of other business types in the zone.

Figure 12: Main business types in High Street and Chancery zone, 2020 compared to 2017



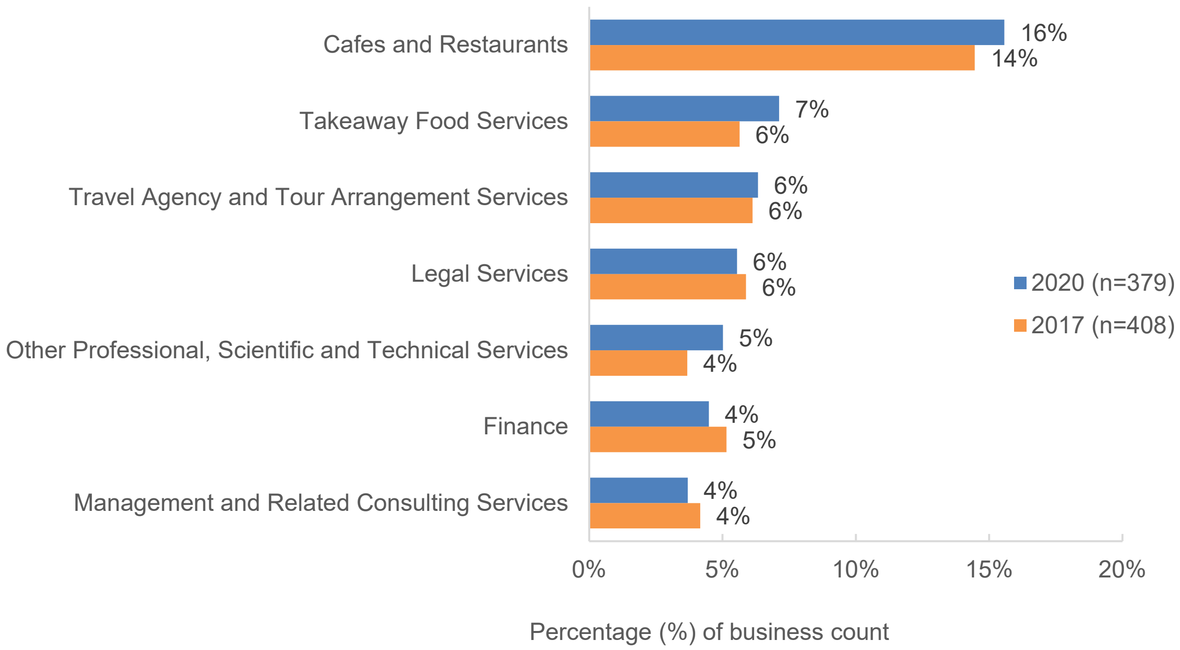
5.3.3 Skycity and Elliott

Businesses located in the Skycity and Elliott zone were more specialised in food services relative to other business types, especially Cafes and Restaurants, which had a count of 59 in both 2017 and 2020. The slight increase in the share of this business type was due to an overall decline in the zone's total business count.

Given that the Sky Tower and SkyCity Casino are major visitor attractions, it is perhaps not surprising to find Travel Agency and Tour Arrangement Services as a main business type for the zone (25 businesses in 2017 and 24 businesses in 2020).

The most noticeable change in the main business type composition between 2017 and 2020 was the emergence of Other Professional, Scientific and Technical Services (e.g. immigration services) and the subsequent non-inclusion of Management and Related Consulting Services as one of the six largest business types in the zone. Their recorded counts of businesses increased by 27 per cent (from 15 businesses) and decreased by 18 per cent (from 17 businesses) respectively.

Figure 13: Main business types in Skycity and Elliott zone in 2017 and 2020

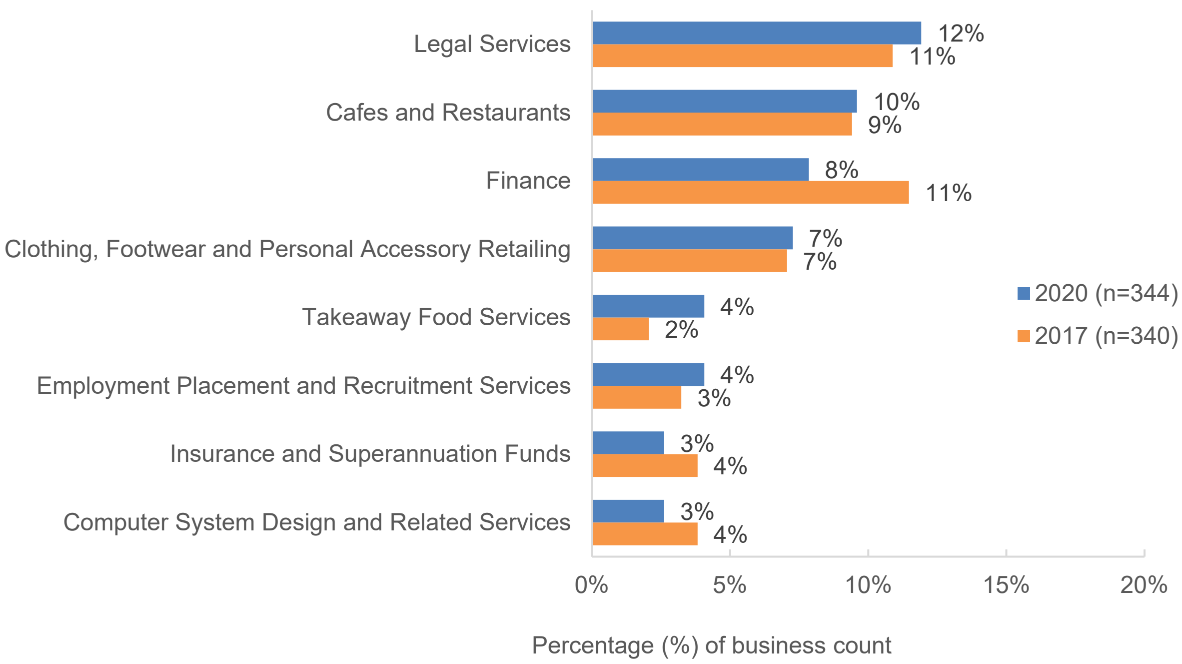


5.3.4 Shortland Street

Over a third of the businesses located in Shortland Street were associated with Legal Services, Finance, Clothing, Footwear and Personal Accessory Retailing, or were Cafes and Restaurants.

Between 2017 and 2020, there was an emergence of Takeaway Food Services and Employment Placement and Recruitment Services as two of the six largest business types in the Shortland Street zone. This was associated with a respective increase of 75 per cent (from eight businesses) and 27 per cent (from 11 businesses) in their recorded counts. In comparison, the number of businesses in Insurance and Superannuation Funds and Computer System Design and Related Services both fell by 31 per cent (from 13 businesses).

Figure 14: Main business types in Shortland Street, 2020 compared to 2017

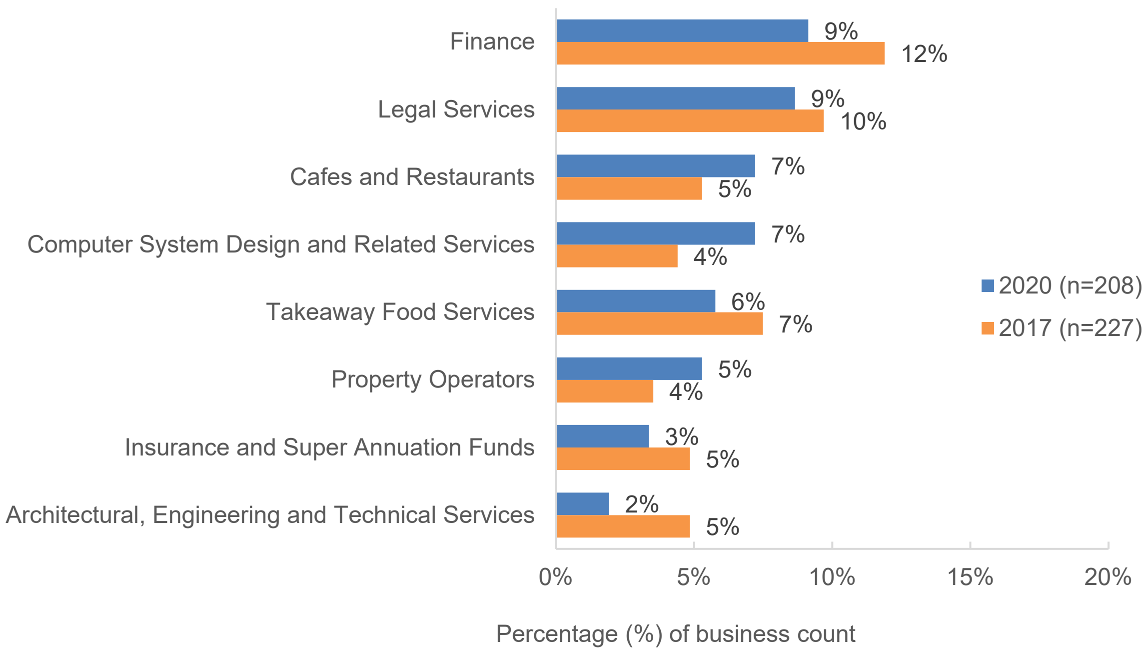


5.3.5 Lower Albert and Hobson

Overall, there were 208 businesses recorded in the Lower Albert and Hobson zone in 2020 – 19 fewer than in 2017. The largest number of businesses in the zone were associated with Finance and Legal Services. However, the shares of these two business types also fell between 2017 and 2020 as they respectively had eight fewer (30% decrease from 27) and four fewer (18% decrease from 22) businesses located in the zone in 2020 than in 2017.

There were also some noticeable changes in the composition of the zone's main business types. Insurance and Superannuation Funds, and Architectural, Engineering and Technical Services, used to collectively account for a tenth of the businesses in 2017. However, by 2020, their associated counts reduced to below 10 (a 36% decrease from 11 and a 64% decrease from 11 respectively), resulting in a halving of their collective share. In comparison, Computer System Design and Related Services became the fourth largest business type in the zone by 2020 as the number increased to 15 (50% increase from 10) since 2017.

Figure 15: Main business types in Lower Albert and Hobson, 2020 compared to 2017

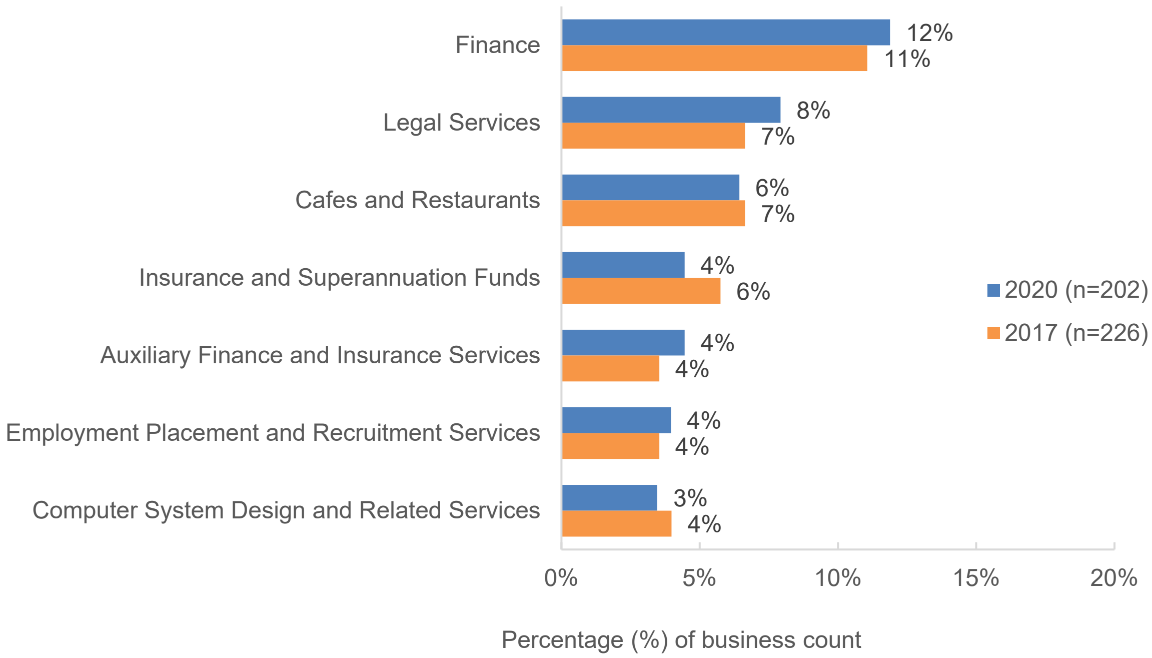


5.3.6 Commercial Bay

Although businesses in Commercial Bay experienced the largest percentage decrease since 2017 (11% from 226 businesses), the collective shares of its main business types were similar in 2020. For instance, businesses in Finance and Legal Services, and Cafes and Restaurants constituted about a quarter of the businesses in the zone in 2017 and 2020.

A higher share of businesses in Commercial Bay were associated the Financial and Insurance Services industry. In 2017, there were 46 businesses in Finance (25), Insurance and Superannuation Funds (13) or Auxiliary Financial and Insurance Services (8). By 2020, Auxiliary Financial and Insurance Services became the fifth largest business type (9 businesses), replacing Computer System Design and Related Services (7 businesses).

Figure 16: Main business types in Commercial Bay, 2020 compared to 2017

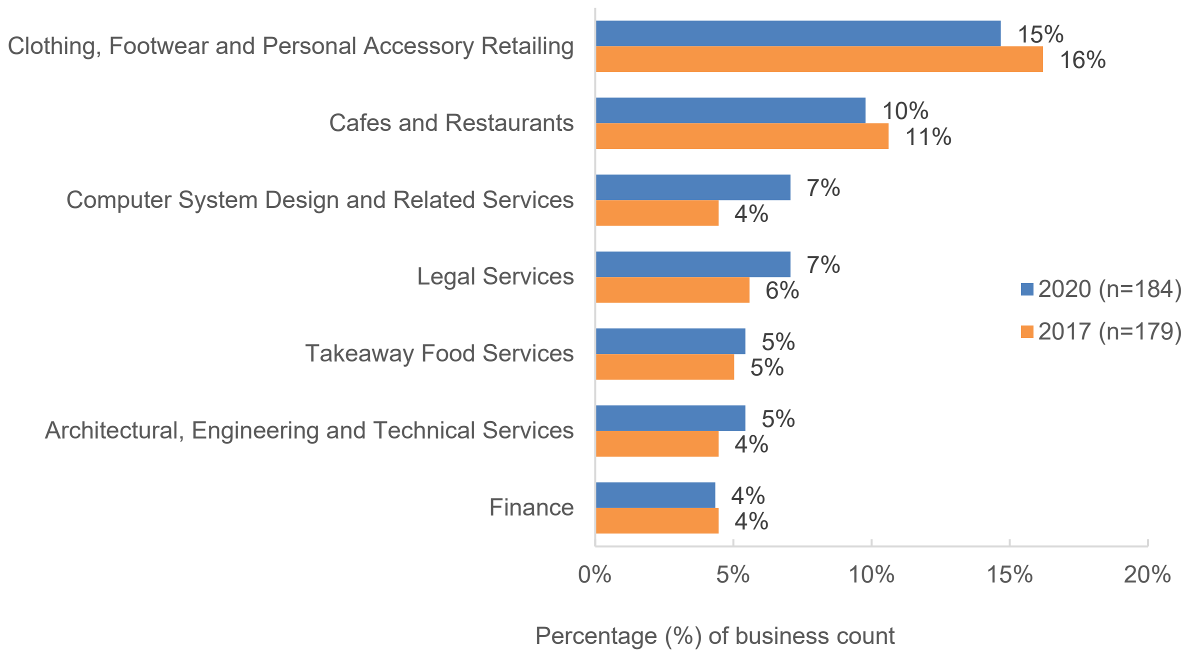


5.3.7 Britomart

Britomart contained the smallest number of businesses in the study area. About a third of the businesses in this zone were clothing, footwear and personal accessory retailers, cafes and restaurants, and takeaway shops.

From 2017 to 2020, the share of businesses in the zone providing Computer System Design and Related Services increased by three percentage points (from 4%). This was associated with a 63 per cent increase in its number (from eight businesses). Architectural, Engineering and Technical Services replaced Finance as it had two more businesses by 2020 compared to 2017 (from eight businesses) while the number of Finance businesses remained at eight.

Figure 17: Main business types in Britomart, 2020 compared to 2017



6.0 Changes in vacant business premises and business locations

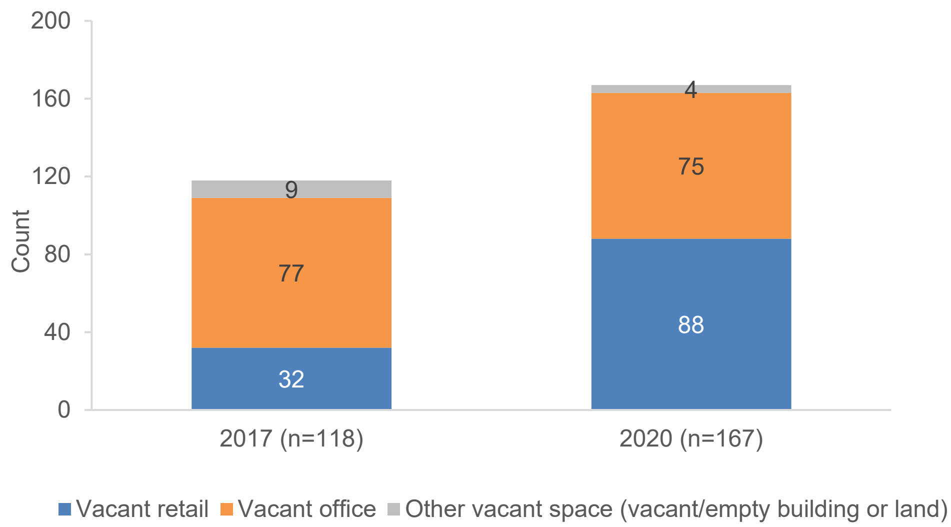
This section begins with describing changes in observed vacant business premises across the study area. This is followed by an analysis of address information of all businesses recorded in 2017 and 2020, to identify any possible relocations, business establishments and disestablishments that may have occurred since the 2017 study.

Note that analysis presented on vacant business premises are limited to those that are publicly accessible or visible from the street and on signage in building foyers. Therefore, it may under-represent the actual number of vacant business premises as indicated from commercial property rental listings.

6.1 Changes in vacant business premises

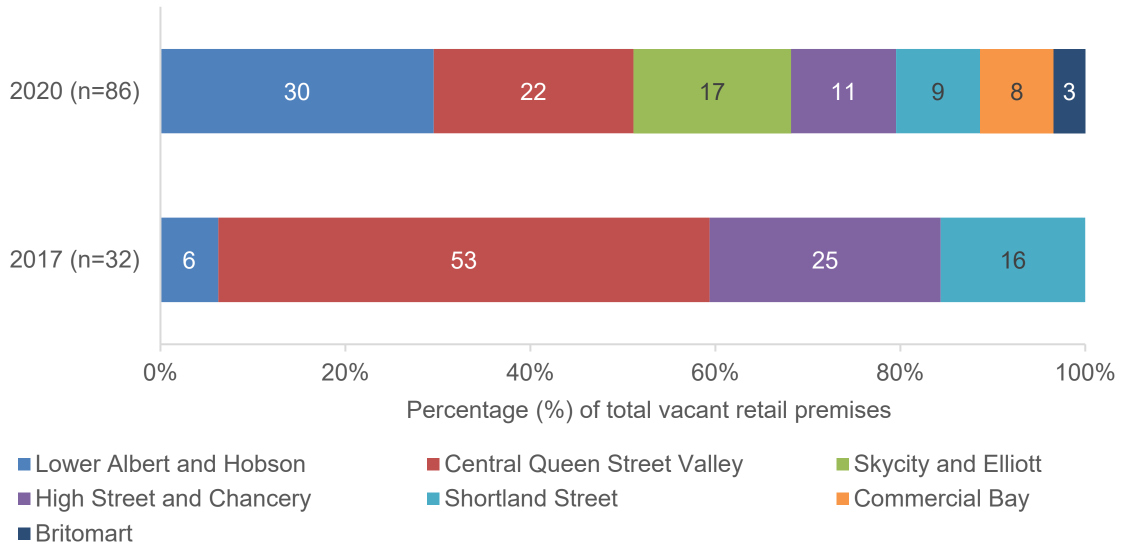
The 2020 census of businesses counted 54 more vacant business premises across the study area compared to 2017. As the number of vacant offices stayed roughly the same, the observed change in vacancies was due to the marked increase in observed vacant retail premises. The recorded count nearly tripled (a 175% increase from 32 to 88) between 2017 and 2020 (Figure 18).

Figure 18: Vacant/ empty space by type, 2020 compared to 2017



There were also notable changes in the spatial distribution of vacant business premises. In 2017, vacant retail premises were predominantly observed in Central Queen Street Valley (53%) and High Street and Chancery (25%). A small share was also located in the Lower Albert and Hobson zone (6%), and no vacant retail premise was observed in Skycity and Elliott. However, in 2020, as these two zones had 24 more and 15 more vacant retail premises compared to their numbers recorded in 2017, they collectively constituted about half of the study area total. A possible related factor for this change could be the construction works of City Rail Link and Commercial Bay Redevelopment, which may have negative impacts to the operation of local shops. In fact, it has been often reported that small businesses on Lower Albert Street have been struggling with the street closure due to the City Rail Link construction (New Zealand Herald, 2019).[21]

Figure 19: Retail space vacancies by zone (%), 2020 compared to 2017

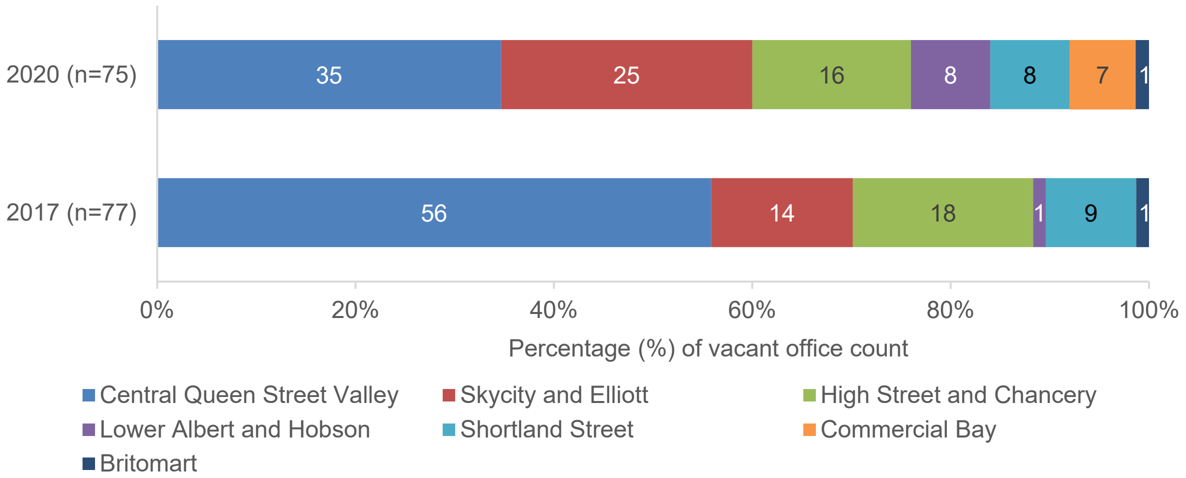


Although the number of observed vacant offices in 2020 were roughly the same for the study area as a whole, there were some notable differences in their spatial distribution. While Central Queen Street Valley still had the largest number of vacant offices, with 17 fewer office vacancies (a 40% decrease from 43) observed in 2020, its share fell by 21 percentage points. The proportion of the city centre's vacant offices located in Skycity and Elliott increased substantially to 25 per cent. This zone

[21] Struggling businesses affected by ongoing City Rail Link to receive assistance. Article available at: https://www.nzherald.co.nz/nz/news/article.cfm?c_id=1&objectid=12295054

had eight more office vacancies as at January 2020 compared to three years prior (a 73% increase from 11).

Figure 20: Vacant offices by zone (%), 2020 compared to 2017



6.2 Changes in business locations

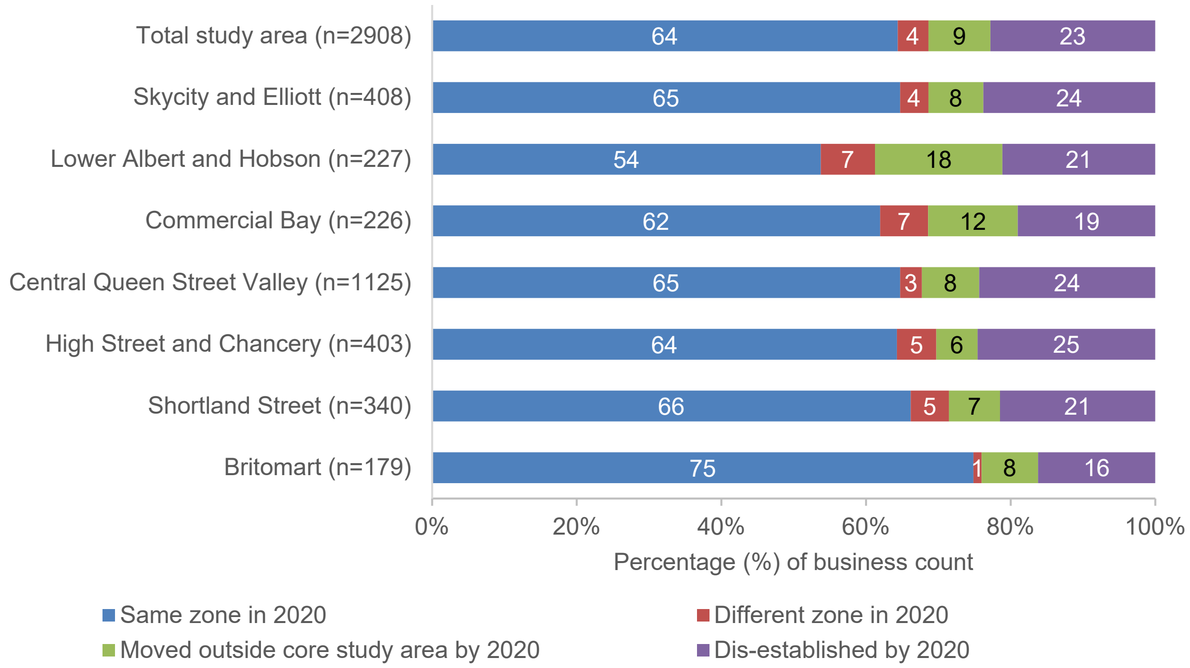
Results presented in this section are based on an analysis of the addresses of all businesses recorded in the 2017 and 2020 censuses of businesses. For businesses that were only observed in 2020, a search of their business addresses three years prior was undertaken using online sources such as MBIE's New Zealand Companies Register, Google and Zomato Restaurant Finder. Similarly, these sources were used to identify the locations, as at January 2020, for those businesses that were recorded in 2017 but were no longer in the study area. The purpose of this analysis was to identify any possible changes in the locations of businesses, or any business establishments or disestablishments that may have occurred between 2017 and 2020.

A total of 3739 individual businesses were recorded in the two censuses of businesses. Of those, 1996 (53%) were in both censuses, 912 (24%) were only recorded in 2017 and 831 (22%) were only in 2020.

Those businesses that were recorded in 2017 but not in the 2020 census had either moved out of the study area (249 businesses) or disestablished (663 businesses). As Figure 21 shows, about two thirds of the businesses recorded in 2017 (1872) stayed in the same zone in 2020. However, this proportion was notably lower for those businesses that were in the Lower Albert and Hobson zone (54%) than for those in other zones. In addition, a greater proportion of businesses in Lower Albert and Hobson moved out of the study area (18%) than those in other zones.

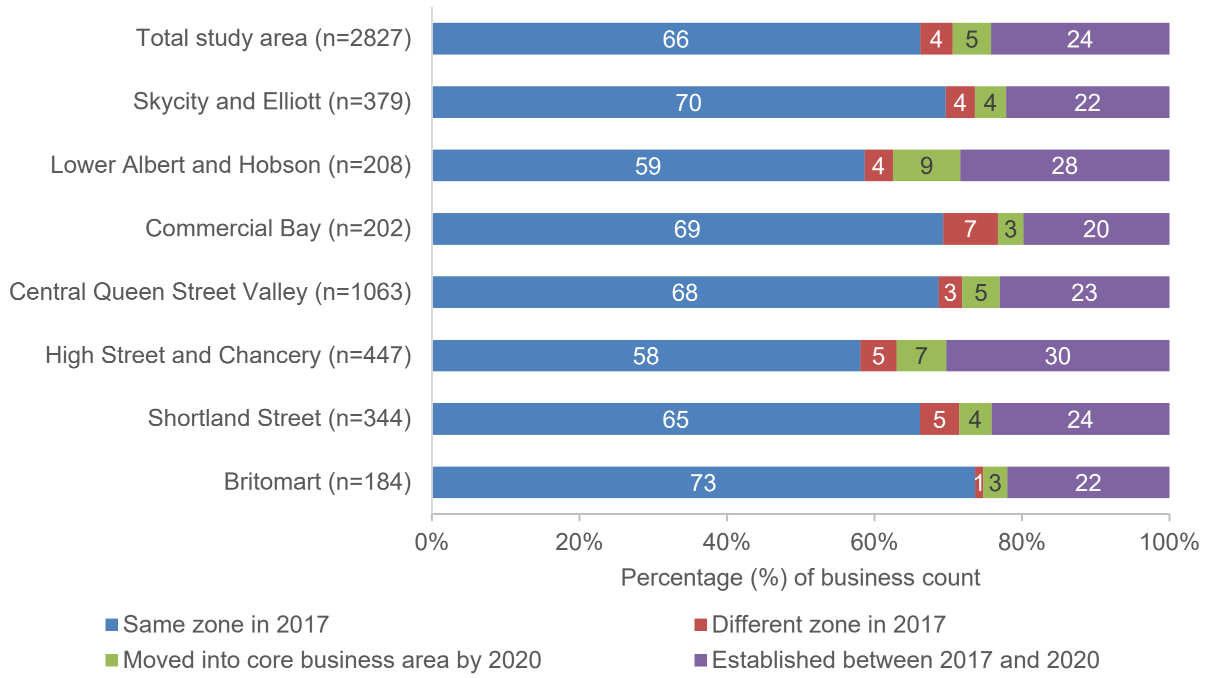
Also note that, compared to other zones, a smaller proportion of businesses in Britomart were disestablished (16%) and a higher share stayed in the same zone (75%).

Figure 21: Location change for businesses recorded in 2017 by zone (%)



For those businesses that were only recorded in 2020, 147 (5% of total business count in 2020) used to be outside the study area; the rest were those established between 2017 and 2020 (684 businesses, 24% of 2020 total business count). Across the zones, the proportions of established businesses or those relocated from outside the study area were notably higher in Lower Albert and Hobson (28% and 9% respectively) and High Street and Chancery (30% and 7% respectively).

Figure 22: Location change for businesses recorded in 2020 by zone (%)



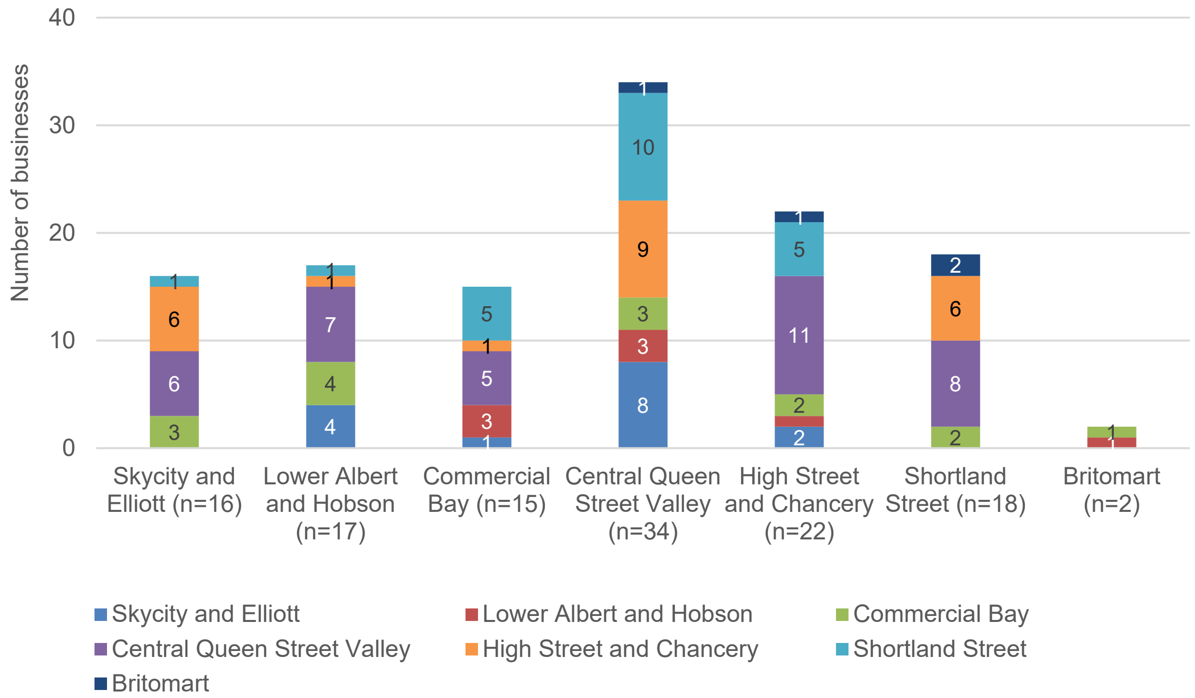
6.2.1 Relocation of businesses across zones

Between 2017 and 2020, a larger number of businesses were relocating from Central Queen Street Valley to a different zone. However, proportionately, there were more across-zone relocations for those businesses that used to be in Lower Albert and Hobson and Commercial Bay three years prior (refer to Figure 21).

Figure 23 indicates that Central Queen Street Valley tend to be a more popular destination for relocations from other zones. High Street and Chancery was also popular for businesses that used to locate in zones such as Skycity and Elliott, Central Queen Street Valley and Shortland Street.

For those relocations from the zones of Skycity and Elliott, Lower Albert and Hobson and Commercial Bay, over half moved to Central Queen Street Valley, High Street and Chancery and Shortland Street. These zones are considered less affected by the City Rail Link and Commercial Bay Redevelopment construction.

Figure 23: Relocation of 2017 businesses by zone of new location

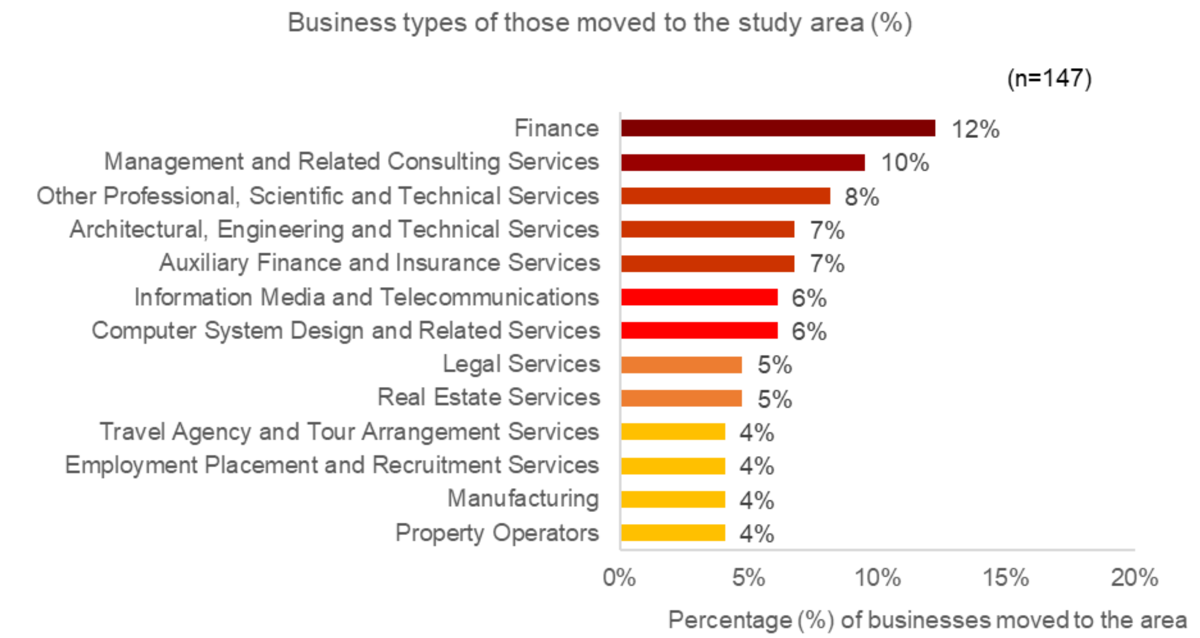


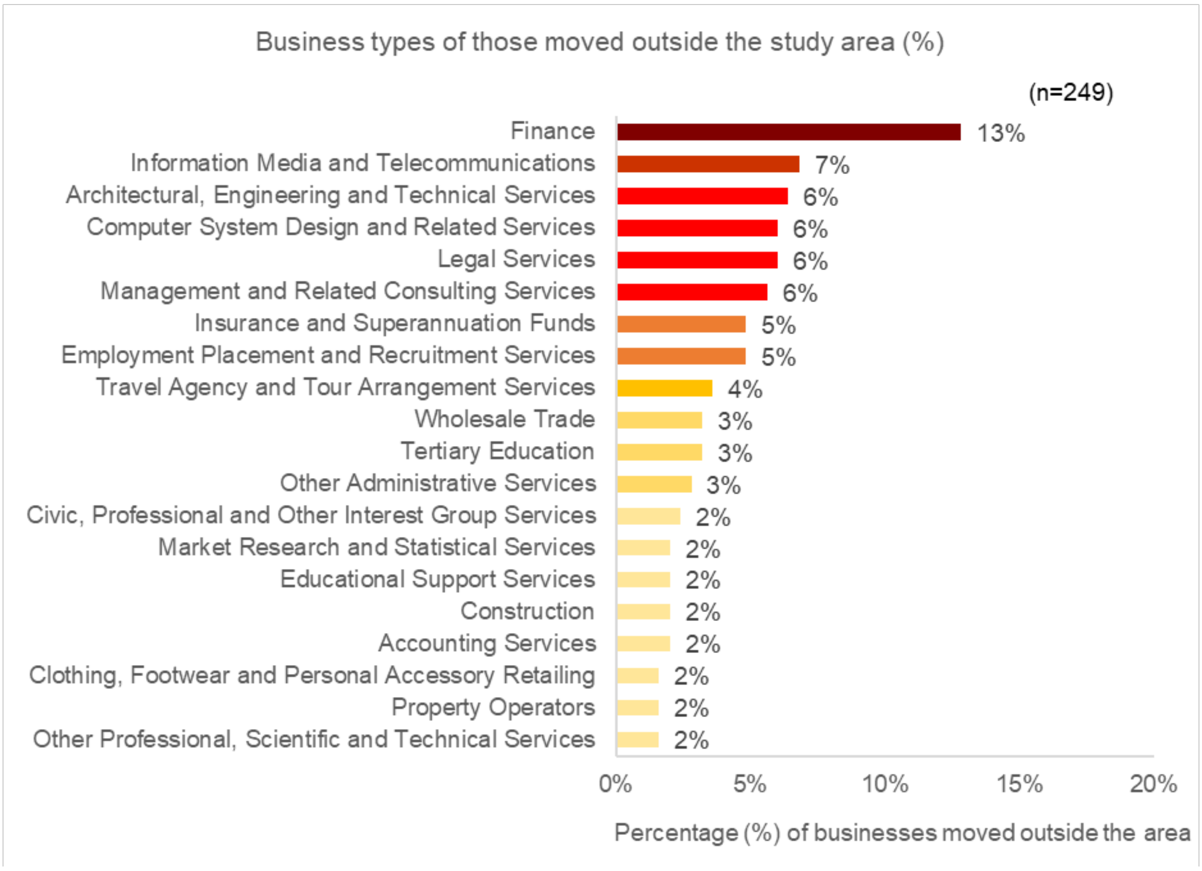
6.2.2 Relocation of businesses from or to the study area

Between 2017 and 2020, there were 102 more businesses (71% more) that moved out of the study area than those that moved in. About half of the businesses that moved in (50%) and out of the area (44%) were associated with knowledge-intensive industries. Among these, Finance had the largest number that moved in (18 businesses) and out (32 businesses).

There were some other business types that had a larger number moved into the study area than moved outside. For example, Other Professional, Scientific and Technical Services had eight more businesses (64% more) moved in (12 businesses) than moved out (4 businesses). Auxiliary Financial and Insurance Services, Real Estate Services and Manufacturing only had businesses entering the study area (10, 7 and 6 businesses moved in respectively) between 2017 and 2020. Management and Related Consulting Services had the same number of businesses moved in and out (14 businesses).

Figure 24: Business types of those moved into and out of the study area between 2017 and 2020 (%)





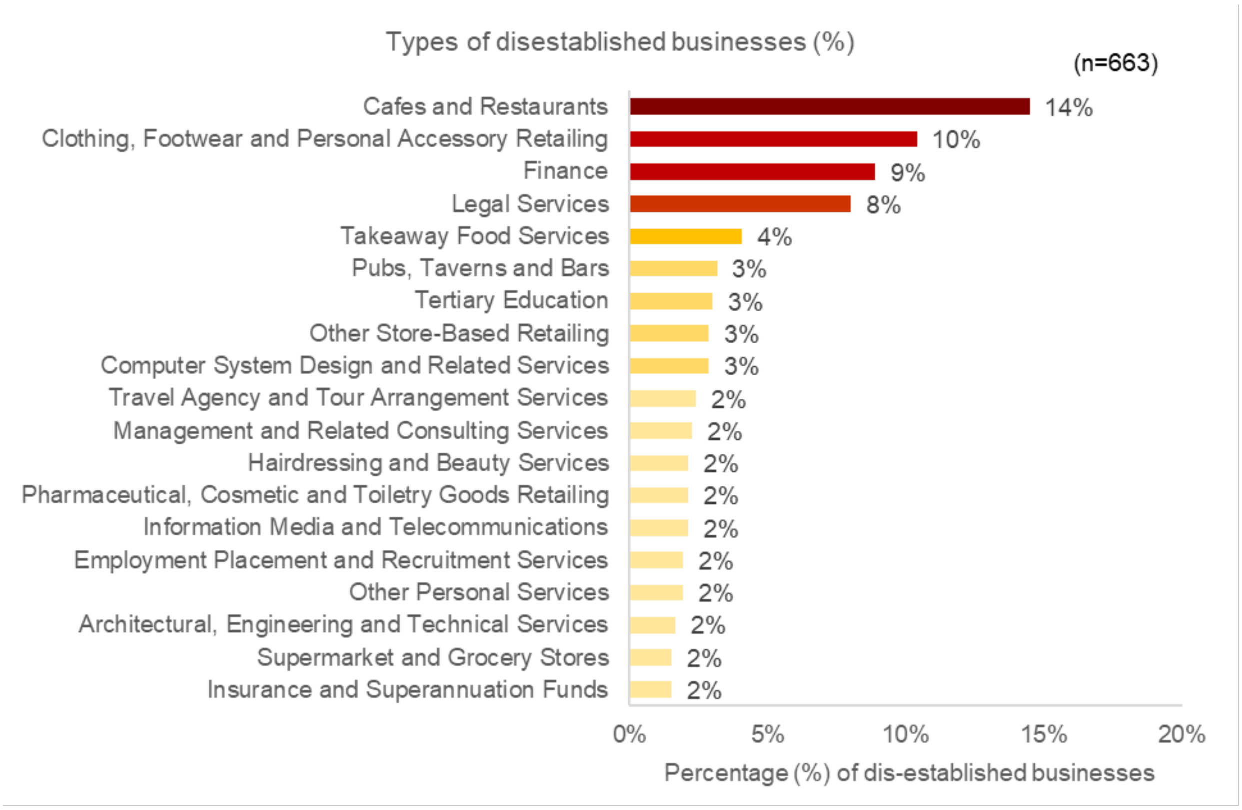
6.2.3 Businesses disestablished and established between 2017 and 2020

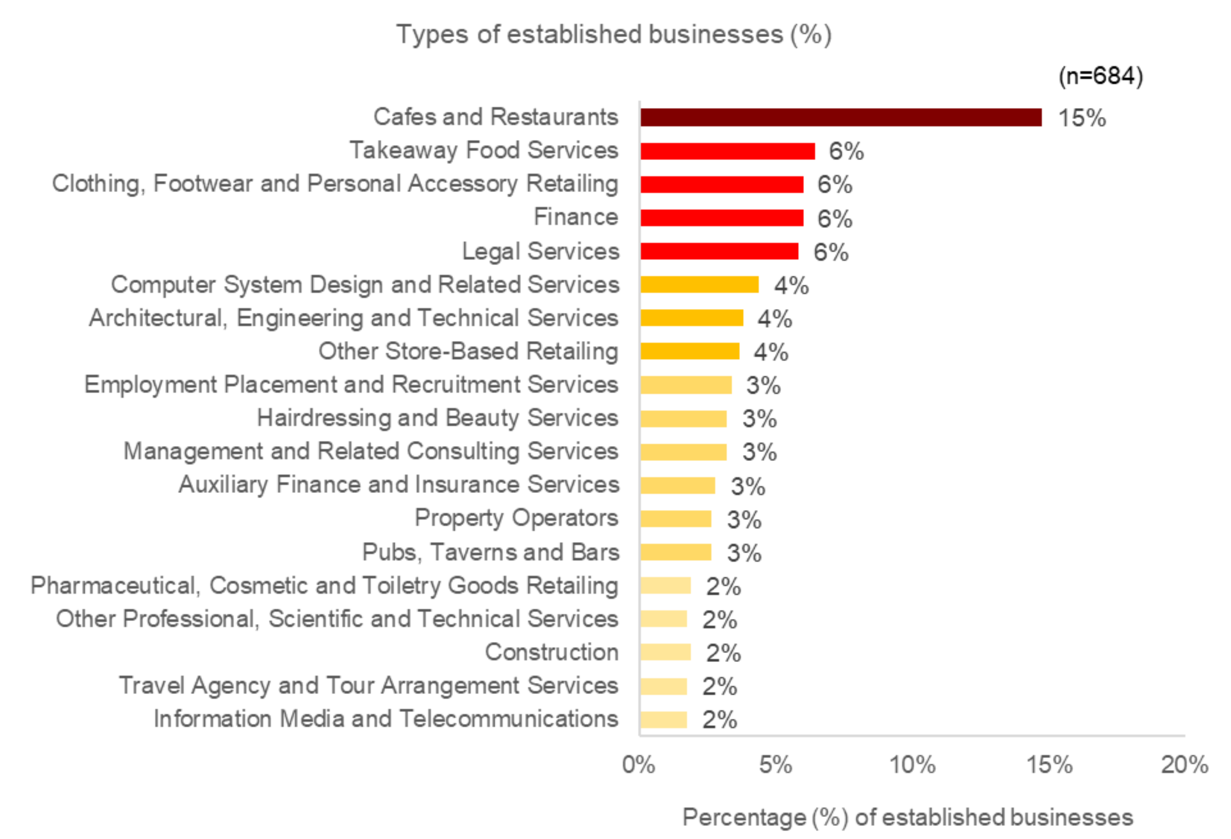
About a third (31%) of the disestablished businesses were those providing food and hospitality services (144 businesses) or clothing, footwear and personal accessory retailers (69 businesses). Cafes and restaurants accounted for the highest share of disestablished businesses, with 96 closing down between 2017 and 2020.

Some business types showed notably more establishments than disestablishments. Computer System Design and Related Services had 11 more (58% more) businesses established than those that had disestablished (19 businesses). There were 17 more takeaway businesses established between 2017 and 2020 (44 businesses) than those that shut down (27 businesses). This was the driver of the growth of Takeaway Food Services businesses in the study area between 2017 and 2020 (refer to Section 3.2).

Clothing, Footwear and Personal Accessory Retailing, Finance and Legal Services had notably fewer businesses established (41, 41 and 40 respectively) than the number who had disestablished (69, 59 and 53 respectively). In combination with more businesses moved away from the study area for these business types, they experienced larger decreases in their business counts (a decrease of 33, 33 and 21 respectively) compared to the rest of business types in the study area.

Figure 25: Types of businesses disestablished and established between 2017 and 2020 (%)





7.0 Conclusion

The core business area of Auckland’s city centre is concentrated with businesses associated with knowledge-intensive industries, as well as retail and food services. More specifically, the area has a large number of cafes and restaurants, clothing, footwear and personal accessory retailers, takeaways, and businesses providing financial, legal and IT professional services.

Results from our census of businesses show fewer businesses in Auckland’s city centre in early 2020 compared to three years prior. Across the different business types, clothing, footwear and personal accessory retailers, finance businesses and legal services firms experienced larger declines. For these business types, a much larger number of businesses had disestablished or left the city centre than the number who had either moved to or established in the area between 2017 and 2020. In contrast, Takeaway Food Services saw the biggest growth as there were notably more takeaway businesses established since 2017 than those that closed down.

Spatial analysis shows that the central part of Queen Street Valley was the most concentrated business area in the city centre. It also had the highest shares of most business types, especially clothing, footwear and personal accessory retailers. High Street and Chancery Square had the second largest number of businesses as at January 2020, with high concentration of cafes and restaurants and a growing number of businesses in high productivity service industries. The declines in business activities and increased vacant business premises in areas around Skycity and Elliott Street, Lower Albert and Hobson Streets and Commercial Bay could be linked to their closer proximity to the City Rail Link and the Commercial Bay Redevelopment construction sites. These two major construction projects are likely to have negative impacts on the operation of local businesses.

This report highlights that Auckland’s city centre is a hub for high productivity industries, and a main location for retail and food services, with high business concentration in Central Queen Street Valley and High Street. There was, however, a decline in business activities as more businesses had either disestablished or left the city centre. This was accompanied with a significant increase in vacant business premises in areas that are closer to the City Rail Link. These findings could prompt future research on factors influencing business location choices in the city centre and decisions to leave, and how they are affected by changes in the external environment. This is particularly important in the current context, as the City Rail Link has and continues to have significant impact on businesses in the city and the extent of Covid-19’s negative effect on the city centre economy is still unfolding.

8.0 References

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Appendix List of business types

ANZSIC 1-digit industry	Business type	2017	2020
Agriculture, Forestry and Fishing	Agriculture, Forestry and Fishing	10	10
	Industry total	***10***	***10***
Mining	Mining	2	2
	Industry total	***2***	***2***
Manufacturing	Manufacturing	27	29
	Printing	7	4
	Bakery Product Manufacturing (Non-factory Based)	8	8
	Industry total	***42***	***41***
Electricity, Gas, Water and Waste Services	Electricity, Gas, Water and Waste Services	7	7
	Industry total	***7***	***7***
Construction	Construction	25	31
	Construction Services	7	5
	Industry total	***32***	***36***
Wholesale Trade	Wholesale Trade	34	29
	Industry total	***34***	***29***
Retail Trade	Supermarket and Grocery Stores	36	35
	Specialised Food Retailing	16	13
	Furniture, Floor Coverings, Houseware and Textile Goods Retailing	4	5
	Recreational Goods Retailing	11	9
	Electrical and Electronic Goods Retailing	12	8
	Clothing, Footwear and Personal Accessory Retailing	215	182
	Department Stores	3	4
	Pharmaceutical, Cosmetic and Toiletry Goods Retailing	34	33
	Stationery Goods Retailing	4	3
	Antique and Used Goods Retailing	7	8
	Flower Retailing	7	8
	Other Store-Based Retailing	52	60
	Non-Store Retailing	1	2
	Industry total	***402***	***370***
Accommodation and Food Services	Cafes and Restaurants	266	269
	Takeaway Food Services	100	119
	Pubs, Taverns and Bars	44	42
	Clubs (Hospitality)	9	8
	Accommodation	30	33
	Industry total	***449***	***471***
Transport, Postal and Warehousing	Rail Transport	2	2
	Water Freight Transport	16	12
	Air and Space Transport	18	20
	Postal and Courier Pick-up and Delivery Services	2	1
	Warehousing and Storage Services	2	3
	Transport Support Services	2	2
	Industry total	***42***	***40***
Information Media and Telecommunications	Information Media and Telecommunications	65	55
	Industry total	***65***	***55***
Financial and Insurance Services	Finance	235	202
	Insurance and Superannuation Funds	65	50
	Auxiliary Financial and Insurance Services	31	53
	Industry total	***331***	***305***

ANZSIC 1-digit industry	Business type	2017	2020
Rental, Hiring and Real Estate Services	Motor Vehicle and Transport Equipment Rental and Hiring	3	3
	Other Goods and Equipment Rental and Hiring	1	0
	Property Operators	64	78
	Real Estate Services	33	39
	Industry total	***101***	***120***
Professional, Scientific and Technical Services	Scientific Research Services	5	6
	Architectural, Engineering and Technical Services	83	91
	Legal Services	260	239
	Accounting Services	48	50
	Advertising Services	16	13
	Market Research and Statistical Services	13	8
	Management and Related Consulting Services	98	104
	Professional Photographic Services	9	7
	Other Professional, Scientific and Technical Services	69	81
	Computer System Design and Related Services	101	107
	Industry total	***702***	***706***
Administrative and Support Services	Employment Placement and Recruitment Services	80	82
	Travel Agency and Tour Arrangement Services	84	77
	Other Administrative Services	34	26
	Building Cleaning, Pest Control and Other Support Services	1	1
	Industry total	***199***	***186***
Public Administration and Safety	Central Government Administration	33	25
	Local Government Administration	8	7
	Foreign Government Representation	19	19
	Investigation and Security Services	7	7
	Industry total	***67***	***58***
Education and Training	Preschool Education	4	4
	Tertiary Education	65	45
	Adult, Community and Other Education	3	3
	Educational Support Services	37	39
	Industry total	***109***	***91***
Health Care and Social Assistance	Hospitals	1	1
	Medical Services	9	8
	Dental Services	17	15
	Optometry and Optical Dispensing	12	10
	Physiotherapy Services	5	6
	Chiropractic and Osteopathic Services	5	7
	Other Health Care Services	32	29
	Social Assistance Services	2	3
	Industry total	***83***	***79***
Arts and Recreation Services	Museum Operation	5	3
	Creative and Performing Arts Activities	5	4
	Sport and Physical Recreation Activities	13	10
	Amusement and Other Recreation Activities	4	5
	Gambling Activities	3	3
	Industry total	***30***	***25***

ANZSIC 1-digit industry	Business type	2017	2020
Other Services	Electronic (except Domestic Appliance) and Precision Equipment Repair and Maintenance	10	10
	Clothing and Footwear Repair	10	9
	Other Repair and Maintenance	6	4
	Hairdressing and Beauty Services	80	85
	Funeral, Crematorium and Cemetery Services	1	1
	Laundry and Dry-Cleaning Services	2	1
	Photographic Film Processing	2	2
	Parking Services	25	26
	Other Personal Services	27	21
	Religious Services	4	3
	Civic, Professional and Other Interest Group Services	35	34
	Industry total	***202***	***196***
Not Elsewhere Included	Don’t Know	6	5
Total		**2908**	**2827**

Note: Classification of businesses by industry was undertaken by RIMU and may differ from information elsewhere (e.g. Stats NZ, Infometrics)

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