Restriction on Hours of Trade for Alcohol Licensees in Auckland

Economic Impact Assessment

Prepared for: Auckland Council

Date: May 2013
Status: Final

m.e spatial

Restriction on Hours of Trade for Alcohol Licensees in Auckland

Economic Impact Assessment

Auckland Council

Document reference: ACL045.13 Liquor Licensing Hours

Date of this version: May 2013

Report author(s): Tom Worley, Derek Foy

Market Economics Limited
Level 5, 507 Lake Road
PO Box 331 297, Takapuna
Auckland 0740, NZ
P 09 915 5510

Executive Summary

The Sale and Supply of Alcohol Act 2012 came into force on 18 December 2012. A key feature of the Act is the introduction of national maximum trading hours, which will come into effect on 18 December 2013. These default maximum default trading hours are 8am to 4am for on-licences, and 7am to 11pm for off-licences. Territorial authorities will be able to restrict or extend the maximum default trading hours for certain areas within the territorial authority by developing local alcohol policies (LAPs). Auckland Council commissioned Market Economics Ltd. to assess the economic impact of changing the maximum trading hours through the application of LAPs in Auckland.

The primary objective of this report is to provide Council with an understanding of the contribution that alcohol sales make to the Auckland economy, and describe how this varies spatially and by different times of the day. This assessment is to be completed in two phases: Phase 1 (this document) aims to assess the economic impact of changing licensing hours from the current hours to the SSAA default hours. Phase 2 will then provide an impact analysis of a range of alternative scenarios of licensing hours, based on the findings in Phase 1.

This assessment found that for the 2012 year, $1.47bn worth of alcohol was sold in Auckland. Of this total, on-licence venues accounted for $494m in sales (34%), off-licence outlets $837m (57%) and club-licence venues (which will have the same restrictions as on-licence venues) $141m (10%). Of this total sales value, $13.9m (0.94%) is currently made during what will become the restricted hours of trade, with on-licence venues accounting for $6.9m (1.39% of sales made by on-licence venues) and off-licence venues $7.0m (0.84% of total off-licence sales). Club licenced venues are not understood to currently make any sales during restricted hours.

Most alcohol sales in Auckland are made by outlets located within centres, which account for $914m, or 62% of Auckland’s alcohol sales. Of all the centres, the CBD had the highest value of sales with $207m (14% of Auckland’s total alcohol sales), followed by Newmarket, Ponsonby, Pukekohe, New Lynn and Albany. During the restricted hours of trade, the CBD was the individual centre with the highest value of sales at $6.5m (47% of all sales across Auckland during the restricted hours of trade). The CBD also has the highest proportion of any centre’s total alcohol sales made during the restricted hours of trade, at 3.2%.

Removing the $13.9m worth of alcohol sales made during the restricted hours of trade would have a small negative impact on the Auckland economy. The impact of removing all alcohol sales currently made during what will become the restricted hours of trade would be a decrease in Auckland’s Gross Output of 0.018%, and a decrease in Value Added (equivalent to GDP) of 0.023%. In reality however the impact that results from restricting the hours of trade would be expected to be somewhat lower than this, given the likelihood that changes in behaviour and spending patterns might result, allowing the transfer of spend to other (non-restricted) times. These scenarios will be tested in the Phase 2 report.

Contents

Figures

Tables

1 Introduction

1.1 Background

The Sale and Supply of Alcohol Act 2012 (SSAA) came into force on 18 December 2012. The SSAA creates changes for licence holders, territorial authorities and enforcement agencies, and most of those changes come into effect on either 18 June 2013 or 18 December 2013. A key change is the creation of national maximum trading hours which will apply from 18 December 2013, being 8am to 4am for on-licences, and 7am to 11pm for off-licences. These are the default maximum trading hours that licensed premises will be able to operate.

Territorial authorities will be able to restrict or extend those default maximum trading hours by developing local alcohol policies (LAPs). LAPs will be able to be developed for specific areas within a territorial authority, and different maximum licencing hours (and other factors such as density of licences and other conditions) will be able to be applied to different locations.

1.2 Objectives

Market Economics Ltd (M.E) was commissioned by Auckland Council to assess the economic impact of changing the maximum trading hours through the application of LAPs in Auckland. The primary objective is to provide Council with an understanding of the contribution that alcohol sales make to the Auckland economy, and how this varies spatially and by different times of the day.

The economic assessment will form a part of the regulatory impact assessment for any variation of hours being considered during the options analysis phase of the development of LAPs, and some of the information in the research may be utilised as part of the regulatory impact assessment for the density and location provisions.

1.3 Scope

The project is being undertaken in two parts:

1. **Phase 1**: The economic impact of changing licensing hours from the current hours to the SSAA default hours. This phase is the subject of this report, and will contribute to Council's understanding of how the alcohol industry operates in Auckland and its significance to different geographic locations. Based on this understanding Council will be able to inform their decision making about licensing hour changes that might be enforced by the LAP.
2. **Phase 2**: Following Council's internal consideration of the findings of the Phase 1 report (i.e. this document) we will complete this second part of the project (scheduled for mid-2013). This Phase 2 work will provide an impact analysis of a

range of alternative scenarios of licensing hours that Council are considering, based in part on the information provided by the Phase 1 findings.

2 Methodology

In order for Council to make informed decisions about its LAP, it needs to understand the economic and socio-economic impacts of alcohol sales. The core to this is understanding how sales of alcohol contribute to the Auckland economy now, and how these contributions might change in the future if licensing hours change. We have used three main components in this assessment to provide that understanding:

- Auckland Alcohol Sales Model
- Scenario Model
- Economic Impact Model

2.1 Economic Impact Model

The results of each scenario (including the baseline status quo scenario) will be reflected as changes in the Sales Model, which will feed into the Economic Impact Model (EIM) to track through effects of LAP options on the Auckland economy.

In essence the EIM tracks the 'upstream' flows from producers and importers of alcoholic drinks, through the wholesaling and supply structure, to off-licence and on-licence outlets for sale to business and private consumers (residents and visitors), to show how licensed outlets produce (sell) and consume (purchase) commodities and services. The production and sale of alcohol generates income for producers, distributors and sellers, produces tax revenues, and generates income for those employed at each stage in the process.

This structure applies generally, irrespective of the length of trading hours. The net economic impact will arise from the differences in the patterns of the sale of alcohol if hours are restricted. The specific impacts have been assessed as a consequence of changes in sales in each type of outlet and location, and the consequent direct and total effects on the economy in terms of impacts on output, value added and employment. As discussed with Auckland Council in the project set-up meeting, we have excluded indirect costs associated with changing the hours of alcohol sales.

2.1.1 Economic Futures Model

The EIM uses M.E's Economic Futures Model (EFM) to show the impact of changing the total value of alcohol sales on Auckland's economy. Outlet types were assigned to a sector in the EFM, and changes in the total sales of each outlet type were aggregated to represent the change in total output of the appropriate sector in the EFM. The EFM was then recalculated with the new sector output value to determine the new economic indicators for Auckland (Total Output and Value Added, which is synonymous with GDP). The changes in economic indicators were then compared to the same economic indicators from the baseline EFM for Auckland (i.e. before any sector output changes) to show the economic impact on Auckland due to changes in the amount of alcohol sales.

2.1.2 Output from Impact Assessment

Output from the EIM modelling process allows us to quantify the economic impacts of a reduction in licensing hours in Auckland. These impacts can vary, and the model output allows us to separately describe the impacts on:

- On- and off-licence premises
- Different centre types
- Different types of businesses (alcohol and non-alcohol industry businesses)
- Transferring spend from different times (such as the late night environment into either the daytime or evening economies) or geographic areas.

2.2 Auckland Alcohol Sales Model

The Auckland Alcohol Sales Model (AASM) establishes the baseline alcohol sales environment that currently operates in Auckland, in terms of industry size and the distribution of sales (both spatially and by time). This baseline environment is the 'status quo' against which future alternate scenarios will be compared to evaluate the impacts of changes in licence hours.

2.2.1 Data Components

In this section, we describe the data and data sources that we used as input to the AASM.

National Alcohol Sales Model

This model draws together a range of alcohol-related data published by Statistics NZ (SNZ) at a national resolution to provide an estimate of the value of sales per employee in each key outlet type and for each key product type. That data includes:

a) Alcohol available for consumption: A measure of the volume of total alcohol available for consumption in NZ by product type (beer, table wine, fortified wine and spirits).

b) Consumer Price Index: Historic time series of alcohol price indices for four key classes (restaurant meals, beer, wine and spirits).

c) Business Frame 2012: Counts of the number of businesses (geographic units) and person employed (employment count, or ECs) by outlet type (supermarkets, grocery stores, accommodation, cafes, restaurants, catering, pubs, taverns, bars and clubs). The EC count is then translated into a Modified Employment Count (MEC) to take into account working proprietors, which are not included in the EC records.

The Auckland Centres Model (2012)

This is a proprietary M.E model which integrates data on business activity, population, and consumer demand to summarise to centre-level employment count and estimated sales by each outlet type (at an ANZSIC class level). This data has been used to understand the role and importance of each retail and service type within each centre's overall function (e.g. the share of total centre sales and employment made by restaurants). This describes the base against which we evaluate the significance of any changes in alcohol sales relative to centres' overall sales and activity. The total centre sales for each outlet type (cafes/restaurants, pubs etc.) can then be apportioned across the day using the diurnal profile provided by the Paymark data.

Marketview and Paymark Data

Auckland Council provided us with a detailed dataset they have commissioned through BNZ Marketview. The data records are all card-based (credit and debit) transactions made by consumers of all banks (except ANZ) in merchants in NZ, equivalent to over 75% of all electronic transactions made in NZ. The data provided was provided by Paymark for one-hour blocks to show spending time profiles by location and outlet types within Auckland, for 29 spatial areas, and four outlet types (aggregated in some instances to preserve confidentiality). This data shows the relative importance of different times of the day for sectors engaged in selling alcohol, but not the actual total sales in the sector (as the time distribution is based on a subset of all transactions, i.e. from only Paymark transactions). All outlet types in the alcohol sales model were matched up with appropriate sales distribution structures, based on similarities between business operations. Where no suitable sales distribution structure was available for a particular outlet type, an average sales distribution structure was adopted.

Alcohol Licence Data

Auckland Council supplied M.E with output from its licensing database, which records all licences issued to outlets in the Auckland Region (circa 3,215 licences), by type of licence (On Licence, Off Licence or Club Licence) and location (to meshblock level). The data provided was hours licensed for (which is not necessarily the same as business opening hours), which varies by day of the week and public holidays. The meshblocks identified were then matched up to AC's centres definitions[1] to allow aggregation of licences to centres.

2.2.2 Key Output

The key output of the AASM is total alcohol sales in store types that sell alcohol by one-hour period, by location (centres), and allows us to understand:

- The distribution of sales throughout the day, which indicates the relative importance of different parts of the day to total alcohol sales.

[1] "Understanding the Geographic Relationships Between Households and Retail/Services Centres Across Auckland's Urban Structure: Methodology And Regional Structure Analysis", Auckland Council Internal Report 2012/003, August 2012.

- The relative importance of total alcohol sales to total centre sales for each centre, which indicates the relative importance of alcohol sales to each centre.
- The relative importance of total alcohol sales between each centre type (e.g. Auckland CBD vs. Metropolitan and Town centres).
- The relative importance of total alcohol sales between different licence types (e.g. On-licence vs. Off-licence vs. Club licence venues).
- The relative importance of total alcohol sales between different outlet types (e.g. Liquor stores, supermarkets, bars, cafes and restaurants, etc.).
- Key alcohol sales points across Auckland, which is a combination of outlet type and centre location.
- Cross-referenced data relating to each of the above, such as centre and outlet type by time of day.

2.3 Scenario Model

The Scenario Model draws directly from the Auckland Alcohol Sales Model to provide the structure for assessing direct changes to alcohol sales patterns that could arise as the result of LAPs being introduced. For this Stage 1 report, only the base case scenario (status quo) has been run. Other scenarios are to be developed as part of Stage 2, and those scenarios will be informed by expected market reactions to changes in hours, as informed by market research. This section describes the operation of the Scenario Model as it functions for the status quo scenario and as it will function for the Stage 2 scenarios, although those have not yet been established or run.

The Scenario Model feeds scenarios back into the Sales Model, for the latter to reflect those changes as shifts in sales and by outlets. The structure is straightforward. The Sales Model provides the time and location of alcohol sales, and together with findings from Council's research into alcohol-related issues[2] helps to establish the boundaries of possible changes in spending patterns, and provide a basis for estimating consumer and outlet responses.

Any restriction in trading hours will have different levels of impact on businesses that sell alcohol (and some that don't) depending on the share of their sales which is generated in potentially affected hours. For example, under a new LAP that restricts licensing hours to midnight, cafes which generate the major share of their sales at lunchtime would face a much smaller impact than would a nightclub that currently makes a large share of its sales after midnight. At a centre level then, the mix of business types in that centre, and how important they are relative to total centre activity, will affect the degree to which the centre as a whole is impacted.

[2] e.g. "Local Alcohol Policy Research Report: Information to support the development of a local alcohol policy", Auckland Council report, undated

A range of responses aimed at minimising losses from restricted trading hours is possible from those selling alcohol, and these are incorporated into the scenario definitions. For example:

- On-licence sellers will try to minimise their losses by minimising the reduction in alcohol (and associated goods) sold, for instance by trying to increase the volume of goods sold during opening hours through marketing and other initiatives, rather than begin selling replacement goods and services which do not fit in easily with the core operation.
- Off-licence sellers will also seek to minimise the reduction in the amount of alcohol sold, again through marketing and other initiatives, although the strength of any response is expected to be proportional to the importance of alcohol sales to the business. Specialist retailers such as wine shops are likely to respond more aggressively than are businesses such as supermarkets for which alcohol accounts for a smaller share of total sales.

A range of responses can also be expected from consumers, depending on their current purchasing patterns:

- Some consumers will be largely unaffected, because most of their alcohol purchasing already occurs outside the late night period
- Other consumer segments may need to make significant adjustments to their alcohol spending patterns, because a significant share of their alcohol spending occurs within the restricted hours.

Consumer changes will generally involve a combination of transferring spend that would have occurred during restricted hours to take place within the allowed hours. That may involve a change in one or more of the type of outlet, location of purchase, type of store purchased at (including transfer of spending to non-alcohol related items), type of alcohol purchased, and time of purchase, or not spending at all. To a large degree, this will depend on the geography of the LAP and the availability of alternative options (such as proximity to an area with later licensing hours).

The Scenario Model will be applied as follows:

Step 1: Establish Extent of Changes

a) Identify the change in operating hours.

b) Identify the share of sales (alcohol, and related goods and services) which currently occurs during those (changed) hours for each type of outlet.

c) Identify the share of spend at licensed premises (for each segment) which currently occurs during those (changed) hours.

Step 2: Establish Possible Responses

a) Estimate outlet responses to increase sales in unaffected time periods and to compensate losses (based on literature, and survey output)

b) Estimate consumer responses by key segments (based on literature, household survey, analysis of patterns) to:

   i) shift alcohol spending to unaffected time periods in the same (type of) outlet;

   ii) shift spending to other types of outlet in same location (centre);

   iii) shift spending to other locations (e.g. Central City if it has different trading hours);

   iv) not undertake spend.

Step 2 will be applied in the Scenario Model as part of the Stage 2 report to directly recalculate the sales of alcohol (and related goods and services) under these assumptions, and applied through the Auckland Alcohol Sales Model.

The Scenario Model has been set up to apply estimated responses, rather than measures or modelled responses. In the absence of modelled data and especially of direct experience as to how consumers would respond to the specific situation of changed alcohol trading hours, we will build as much as possible on the 'knowns' – that is, knowledge of current actual behaviour patterns, and understanding of the extent of the change for each group – to arrive at plausible and defendable scenarios (and which can be modified as required).

3 Review of LAP Research Report

The focus of this report is the economic impacts of the SSAA changes to the restricted hours of trade. The social impacts resulting from those changes are outside the scope of this report, however we have drawn on the findings of the Council LAP Research Report to provide an overview of the current thinking about these social impacts.

In broad terms, reductions in public sector expenditure would be expected to result in consequent reductions in tax and other revenue to fund them. While recognising that in most instances any cost savings are transferred to other areas of public sector activity, the Economic Model can be applied to show how those effects may flow through the economy

Auckland Council prepared a research report[3] to support the development of a LAP. That report identifies and discusses Auckland's alcohol related issues through:

- Analysis of internal council data (licence numbers, locations, etc.);
- Collection and analysis of external data, including data from Health Boards and emergency departments, demographic information and tourism data;
- A literature review of consumption behaviour and the existence and management of alcohol related issues (health and social);
- Primary survey work covering:
    - i) Public opinion on alcohol related issues such as health and safety, the benefits and detriments of alcohol and how harm should be managed;
    - ii) Police liquor ban enforcement;
    - iii) Police perceptions on Alcohol related problems.

The report identified that Auckland is experiencing a range of alcohol related issues:

- Patterns of heavy alcohol consumption which vary by time, location and demographic groups;
- Health problems, including acute and chronic health problems;
- Safety concerns, including traffic accidents, water and fire safety issues and diminished perceptions of safety;
- Anti-social behaviour, including liquor ban breaches, criminal and violent offending;
- Sale of alcohol compliance issues.

The conclusion of the report was that while many of the issues identified in the report could not be addressed directly through the creation of a LAP, a LAP could contribute indirectly to

[3] "Local Alcohol Policy Research Report: Information to support the development of a local alcohol policy", Auckland Council report, undated

addressing such issues. The report recommended further investigation into the different policy mechanisms available and their merits, and identified that detailed analysis to determine which approaches can best address the issues identified in the report would be required. The mechanisms currently proposed in the (then) Bill include:

- regulating the location of licensed premises (by reference to broad areas and/or in terms of proximity to premises or facilities of particular kinds);
- determining whether further licences should be issued across the region, or for particular parts of the region;
- maximum trading hours;
- the use of discretionary conditions;
- one-way door restrictions.

4 Auckland Alcohol Industry Structure

4.1 New Zealand Alcohol Industry Sales

Based on M.E's National Alcohol Sales Model (NASM), the total value of annual alcohol sales in New Zealand for 2012 is just under $4.9bn. This is made up by $1.9bn in beer sales (40%), $1.3bn in spirits (27%) and $1.6bn in wine sales (33%). Supermarkets, grocery and liquor stores make just over half of this value at over $2.5bn worth of alcohol, while on and off licence hospitality venues have combined sales of $1.8bn, and all other outlet types (such as vineyards, stadiums, wholesalers, art galleries etc.) are just over $0.5bn (Table 4.1).

Table 4.1: Value of NZ's Alcohol Sales from M.E's NASM (2012 update)

Outlet Type	ANZSIC	Value of Beverages Sold ($m)			
		Beer	Spirits	Wine	Total
Supermarket and Grocery Stores	G411000	$ 486	$ -	$ 745	$ 1,230
Liquor Retailing	G412300	$ 464	$ 656	$ 197	$ 1,318
Food and Liquor		$ 950	$ 656	$ 942	$ 2,548
Accommodation	H440000	$ 158	$ 79	$ 81	$ 318
Cafes and Restaurants	H451100	$ 183	$ 110	$ 295	$ 588
Takeaway Food Services	H451200	$ -	$ -	$ -	$ -
Catering Services	H451300	$ 52	$ 38	$ 47	$ 136
Pubs, Taverns and Bars	H452000	$ 347	$ 215	$ 93	$ 654
Clubs (Hospitality)	H453000	$ 37	$ 43	$ 22	$ 102
Hospitality		$ 776	$ 485	$ 536	$ 1,798
Non-store retail	G43	$ 8	$ 11	$ 13	$ 31
All other outlet types		$ 193	$ 181	$ 126	$ 501
Total		$ 1,928	$ 1,332	$ 1,618	$ 4,878

4.2 Auckland Alcohol Licence Structure and Sales

Auckland has total annual alcohol sales of $1.47bn (in 2012), 30.2% of the national sales. There are currently 3,214 licences in Auckland, with the majority (61%) of these being on-licence venues (Table 4.2).

Table 4.2: Auckland's Licence Structure and Sales

	On Licence	Off Licence	Club Licence	Total
Licences	1,958	856	400	3,214
Alcohol Sales ($m)	$ 494.4	$ 837.1	$ 141.0	$ 1,472.6
Sales per licence ($)	$ 252,500	$ 978,000	$ 352,500	$ 458,200

Total sales by licence type however, as shown in Figure 4.1 below, reflect a different alcohol sales structure. On-licence venues produce $494m of sales (34%), off-licence venues $837m

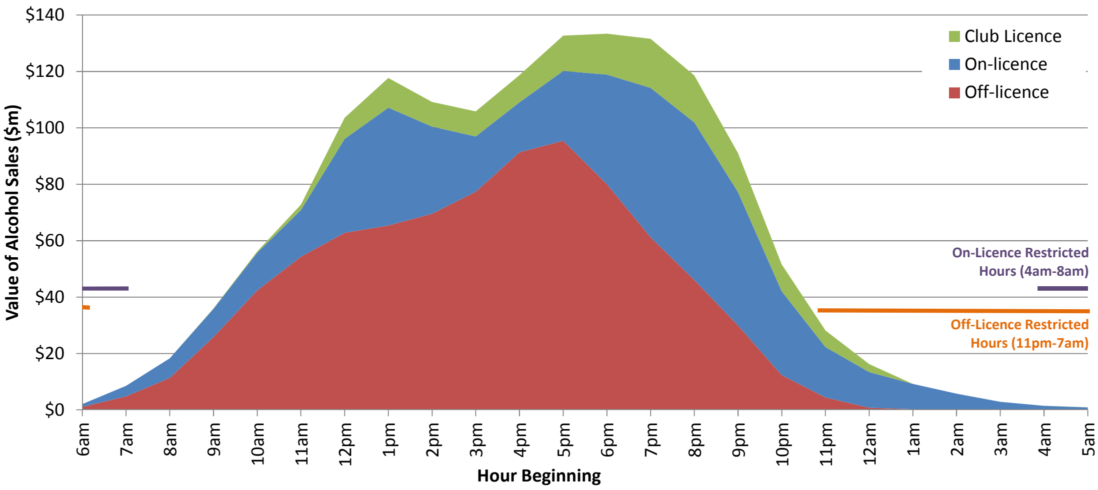
(57%) and club-licence venues make total sales of $141m (10%). Off-licence outlets have the largest average sales per licence at nearly $1m, which is much greater than on licence and club licenced outlets, although this is strongly influenced by the very large sales made by supermarkets which fall within this category.

4.3 Hourly Sales Distribution by Licence Type

The figures below show the diurnal distribution of alcohol sales across Auckland, calculated using daily and hourly average data for the 2012 calendar year. Although this represents total sales, there are likely to be differences by days of the week, although those differences are outside the scope of this project, as it is the average daily profile that is of interest.

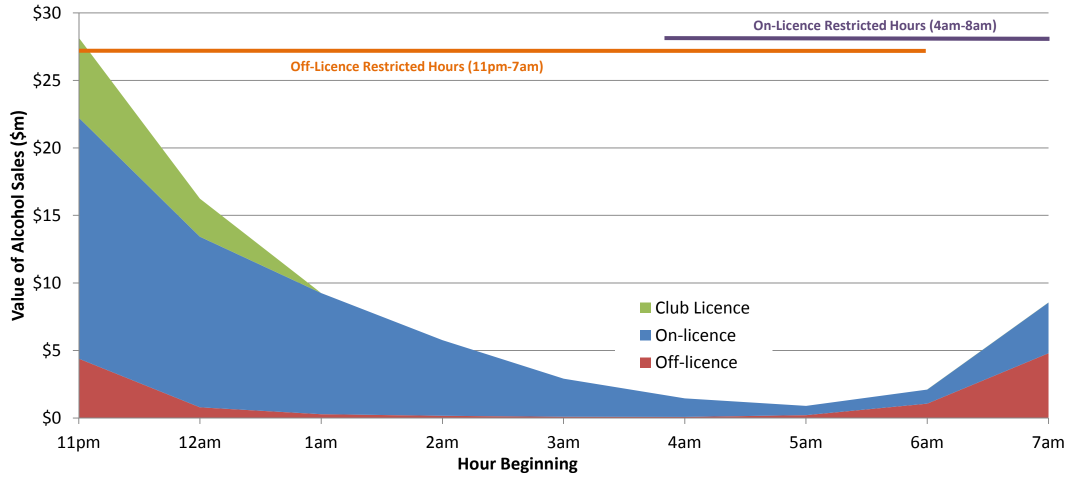
Off-licence venues (of which supermarkets, grocery stores and liquor shops are the main retail types) have the largest value of sales across most of the day, with sales peaking around 5pm and at their lowest levels from 1-6am (Figure 4.1 and Table 4.3). Both on-licence and club licence venues have peaks in sales from around 12-1pm and then again from around 7-8pm. After midnight, alcohol sales are strongly dominated by on-licence venues, although sales are much smaller in this period that at other times of the day, and total alcohol sales are also at their lowest then.

Figure 4.1: Auckland Alcohol Sales by Licence Type (24 hour)



Sales during the restricted hours of trade are shown in more detail in Figure 4.2 and discussed later on in the report in section 8. Note that the charts show sales in the 'hour beginning' each time, so the value for the hour from 7am to 8am should be read off the 7am point on the x axis (i.e. the hour beginning 7am). This means then that the overlay showing the extent of the restricted hours should also be interpreted in this way, so the on-licence restricted hours (4am-8am) are shown as starting above the 4am label, and finishing above the 7am label as the 7am label covers the period 7am to 8am.

Figure 4.2: Auckland Alcohol Sales by Licence Type (11pm-8am)



During the day, from 6am to around 6pm, off-licence venues are responsible for at least 50% of alcohol sales, while after 6pm, on-licence and club licence venues gain the majority share of alcohol sales, as sales in off-licence venues decrease (Figure 4.3).

Figure 4.3: Proportion of Total Alcohol Sales by Licence Type (24 hour)

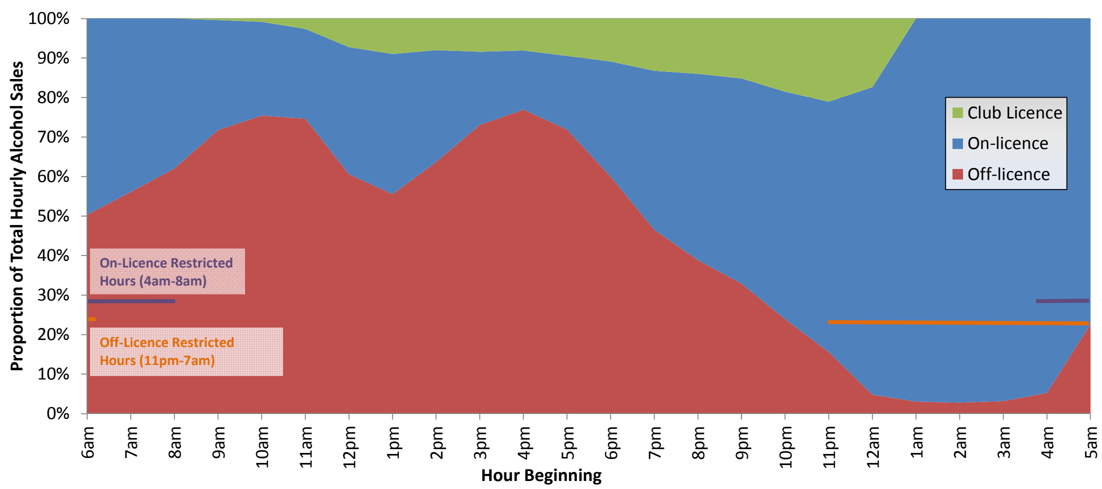


Table 4.3: Total Alcohol Sales per Hour by Licence Type ($m)

Hour Beginning	On-licence	Off-licence	Club Licence	Total Auckland Sales
6am	$ 1.0	$ 1.1	$ -	$ 2.1
7am	$ 3.7	$ 4.8	$ -	$ 8.5
8am	$ 6.9	$ 11.3	$ -	$ 18.3
9am	$ 10.0	$ 25.8	$ 0.1	$ 36.0
10am	$ 13.3	$ 42.4	$ 0.5	$ 56.2
11am	$ 16.5	$ 54.4	$ 1.9	$ 72.8
12pm	$ 33.3	$ 62.8	$ 7.5	$ 103.6
1pm	$ 41.7	$ 65.4	$ 10.6	$ 117.7
2pm	$ 30.9	$ 69.5	$ 8.8	$ 109.2
3pm	$ 19.6	$ 77.3	$ 8.9	$ 105.8
4pm	$ 17.8	$ 91.3	$ 9.6	$ 118.7
5pm	$ 24.8	$ 95.4	$ 12.5	$ 132.7
6pm	$ 38.8	$ 80.0	$ 14.5	$ 133.4
7pm	$ 53.0	$ 61.2	$ 17.4	$ 131.6
8pm	$ 55.9	$ 46.1	$ 16.6	$ 118.6
9pm	$ 47.3	$ 30.0	$ 13.8	$ 91.1
10pm	$ 29.7	$ 12.3	$ 9.6	$ 51.6
11pm	$ 17.9	$ 4.4	$ 5.9	$ 28.2
12am	$ 12.6	$ 0.8	$ 2.8	$ 16.2
1am	$ 9.0	$ 0.3	$ -	$ 9.2
2am	$ 5.6	$ 0.2	$ -	$ 5.8
3am	$ 2.8	$ 0.1	$ -	$ 2.9
4am	$ 1.4	$ 0.1	$ -	$ 1.5
5am	$ 0.7	$ 0.2	$ -	$ 0.9
Total	$ 494.4	$ 837.1	$ 141.0	$ 1,472.6

5 Auckland's Licence and Sales Distribution

5.1 Licence Distribution across Auckland

Most (1,960 licences or 61%) of Auckland's licensed outlets are located within Auckland's centres[4], including:

- 1,413 on-licence premises (72.2% of all on-licence premises)
- 437 off-licence premises (51.1% of all off-licence premises)
- 110 club licences (27.5% of club licence premises) (Table 5.1).

Table 5.1: Licence Distribution by Centre

Centre	On-licence	Off-licence	Club Licence	Total
Albany	18	5	1	24
Birkenhead	22	5	2	29
Botany	13	7	0	20
Browns Bay	20	7	2	29
CBD	476	91	11	578
Devonport	17	4	1	22
Eden Terrace	29	3	2	34
Henderson	18	2	2	22
Highland Park	11	7	1	19
Hunters Corner	8	5	2	15
Kingsland	27	6	2	35
Lincoln Road	11	3	1	15
Manukau Central	25	7	0	32
Mission Bay	23	1	1	25
Mt Eden Village	13	3	1	17
Mt Wellington/Sylvia Park	8	5	0	13
New Lynn	21	2	7	30
Newmarket	65	16	1	82
Onehunga	15	3	4	22
Papakura	16	12	7	35
Parnell	41	2	1	44
Ponsonby	70	4	0	74
Pukekohe	19	8	5	32
Takapuna	47	4	4	55
Titirangi	8	1	1	10
Wairau Park	24	5	0	29
Westgate	5	1	0	6
Bunch 28	174	102	17	293
Bunch 29	124	75	19	218
Bunch 30	45	41	15	101
Outside Centre	545	419	290	1,254
Total	1,958	856	400	3,214

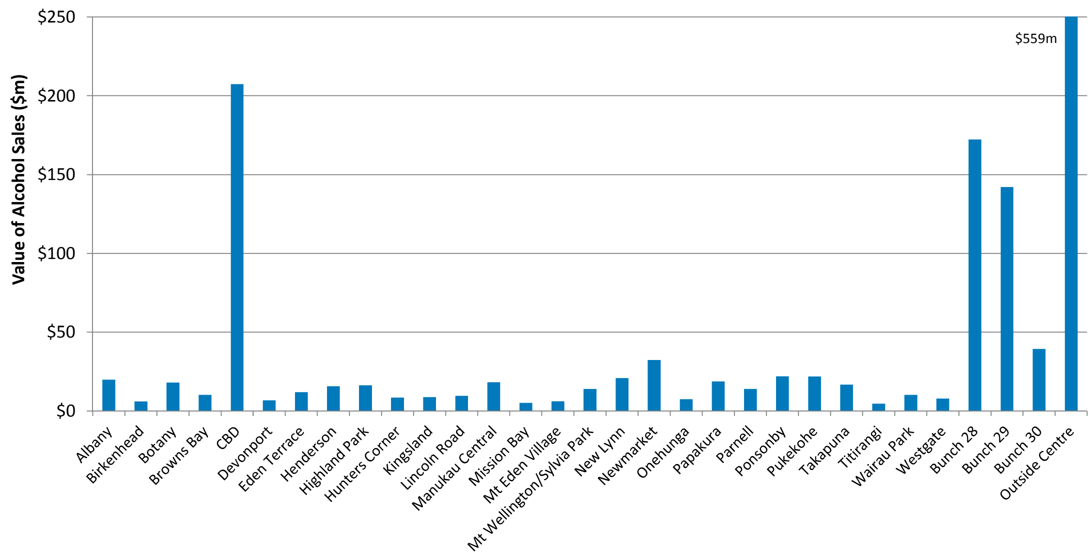
[4] The definition of centres included in Bunch 28, Bunch 29, and Bunch 30 is provided as Appendix 1.

The Central Business District (CBD) has the highest number of on-licence (476 or 24.3% of all on-licences), off-licence (91 or 10.6% of all off-licences), and club licences of any individual centre, and overall 18% of Auckland's licences are located in the CBD. Newmarket, Ponsonby, and Takapuna are the next largest centres in terms of licence numbers, with 82 (2.6%), 74 (2.3%) and 55 (1.7%) each respectively.

5.2 Total Alcohol Sales per Centre

The total combined alcohol sales of all centres in 2012 was estimated to be $914m, which is 62% of Auckland's $1.47bn total sales. The CBD shows the highest value of sales of all the individual centres with $207m, or 14% of Auckland's total sales (Figure 5.1). Of the non-bunched centres Newmarket has the next highest sales figure with $32m, with Ponsonby, Pukekohe, New Lynn and Albany all having sales of between $20m and $22m. Businesses located outside of centres have total alcohol sales of $559m (38% of Auckland's total sales).

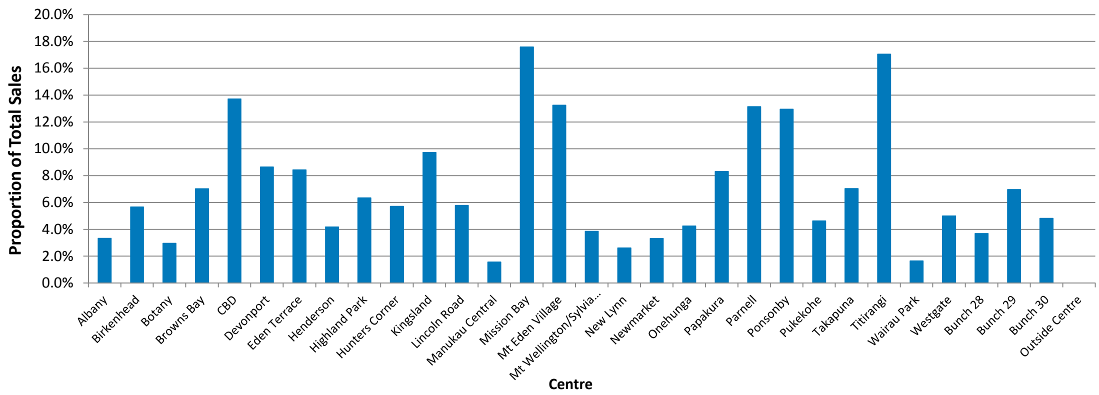
Figure 5.1: Total Annual Alcohol Sales by Centre



5.3 Alcohol Sales as a Proportion of Total Sales

Alcohol is a very important part of some retail and hospitality activity occurring in some centres. In the CBD, Mission Bay, Mt. Eden Village, Parnell, Ponsonby and Titirangi, alcohol makes up between 12% and 18% of total retail and hospitality sales (Figure 5.2). Alcohol makes up at least 2% of total sales for all but two of the remaining centres, with the average across all of Auckland being 7.1%.

Figure 5.2: Alcohol Sales as a Proportion of Total Centre Sales



5.4 Hourly Sales Distribution by Centre

The distribution of alcohol sales throughout the day[5] (Figure 5.3 to Figure 5.6) yields several notable, although not unexpected observations:

- On-licence venues in all centres experience two daily peaks around lunch and dinner times (Figure 5.3).
- For most centres off-licence venues have steadily growing sales throughout the day, peaking from 5 to 6pm. Sales then drop away and after midnight there are very limited sales across Auckland's centres, with most sales after this time coming from the CBD (Figure 5.4 and Figure 5.6).
- From 9am to 6pm (i.e. usual business hours), the proportional distribution of sales across Auckland is relatively consistent between the centres for both on- and off-licence venues, indicating that changes in sales occur fairly evenly across all centres (Figure 5.5 and Figure 5.6).
- The exception to this is in the CBD, where a lunch-time sales peak slightly increases its share of Auckland's on-licence alcohol sales during the middle of the day (Figure 5.5).
- After 6pm, the CBD again becomes more dominant than during daylight hours, and is the dominant area for alcohol sales from late evening through until early in the morning. Ponsonby, Onehunga, Mt Wellington/Sylvia Park and Highland Park also have larger market shares after midnight than they do at other times.
- The dominance of the sales in the CBD during the restricted hours of trade is obvious, which will be discussed in section 8.2.
- For total sales value per hour per centre see Table A2.1, Appendix 2.

[5] Based on daily average data for the 2012 calendar year

Figure 5.3: Total Centre Alcohol Sales for On/Club-Licence Venues per Hour (24-hour)

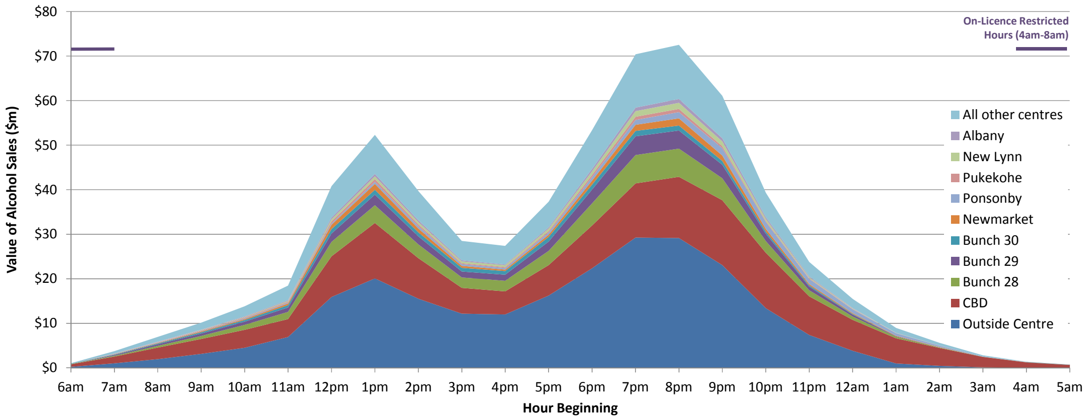


Figure 5.4: Total Centre Alcohol Sales for Off-Licence Venues per Hour (24-hour)

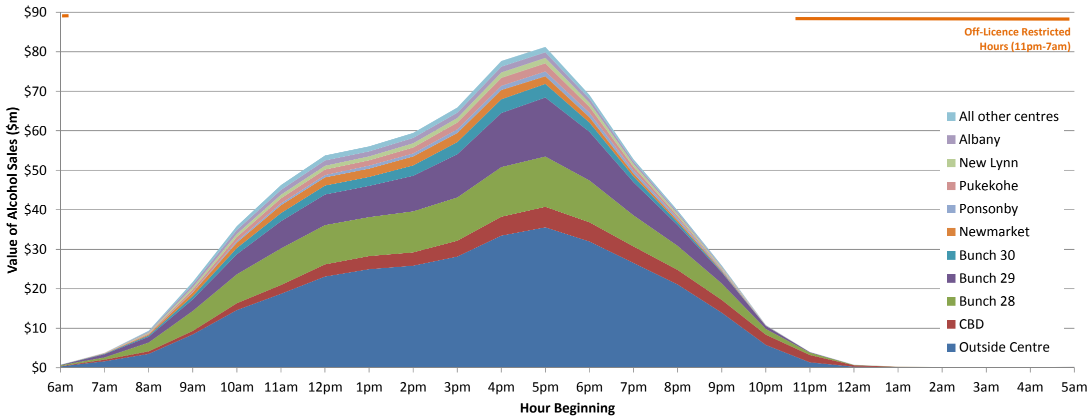


Figure 5.5: Proportion of Total Hourly Alcohol Sales by Centre for On/Club-Licence Venues (24 hours)

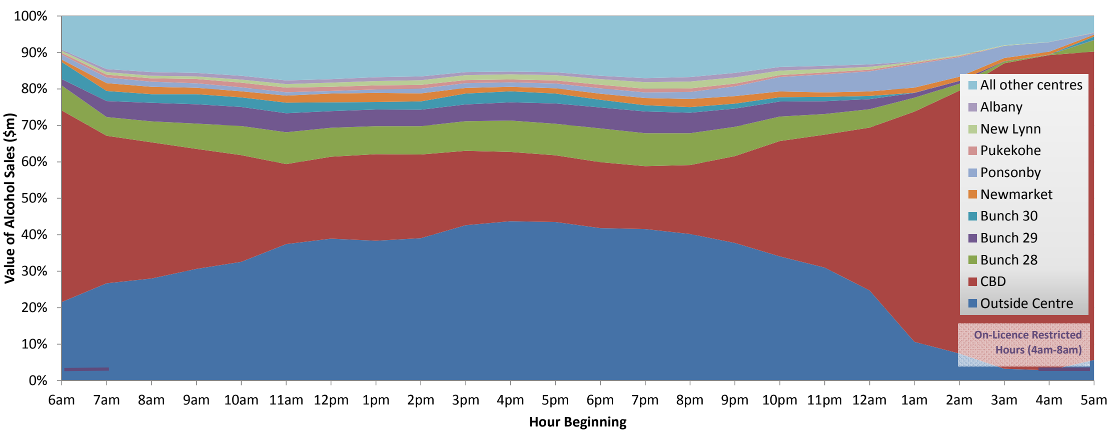
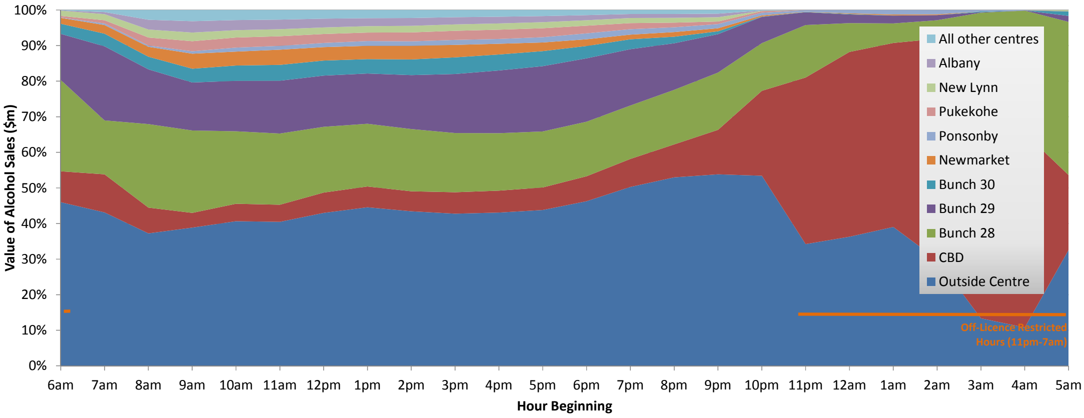


Figure 5.6: Proportion of Total Hourly Alcohol Sales by Centre for Off-Licence Venues (24 hours)



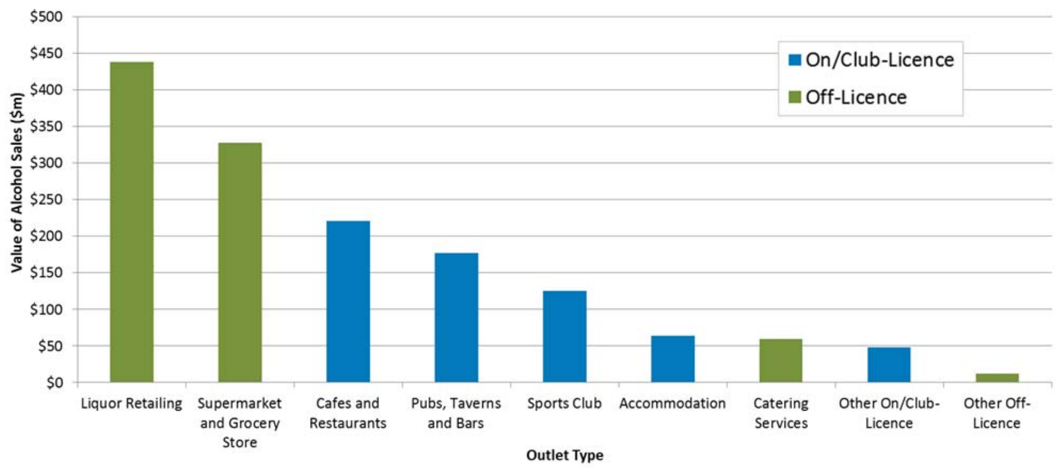
6 Alcohol Sales by Outlet Type

6.1 Total Sales by Outlet Type

Although many types of outlet sell alcohol, alcohol sales are dominated by only a few outlet types:

- Liquor retailing (i.e. specialist alcohol shops such as Liquor King, Liquorland and wine shops) has the highest value of sales across all the store types with $438m (29.7% of Auckland's total sales) (Figure 6.1).
- The second largest contributor to regional alcohol sales is another off-licence category: Supermarkets and grocery stores ($327m, or 22.2%). Together these two off-licence categories make 52% of regional alcohol sales.
- Cafes and restaurants account for $221m (15.0%) of regional sales, and Pubs, Taverns and Bars $177m (12.0%), Sports Clubs $125m (8.5%) and Accommodation $64m (4%). Together these four categories of on- and club licences make 40% of regional alcohol sales.
- Catering Services make 4% of regional alcohol sales, all other on and club licences together make 3%, and all other types of off-licence outlets make less than 1%.

Figure 6.1: Total Annual Alcohol Sales by Outlet Type



6.2 Auckland Alcohol Sales by Hour by On/Club-Licence Outlets

As described earlier in section 4.3, on/club-licence venues have sales peaks around lunch and dinner times, with the evening peak being higher than the lunch peak (Figure 6.2):

- Cafes and Restaurants have the largest value of sales during both these times, followed by Pubs, Taverns and Bars, and then Sports Clubs.
- Evening sales for Pubs, Taverns and Bars peak around 8pm, although are reasonably consistent across a wide timeframe, unlike the other on/club-licence venues.
- There is only a relatively small variation in the structure of sales throughout the day, with increased dominance of Cafes and Restaurants around lunch and dinner times and the night-time dominance of Pubs, Taverns and Bars the most notable exceptions (Figure 6.2 and Figure 6.3).
- See Table A2.2, Appendix 2 for values of sales for each outlet type across the day.

Figure 6.2: Total Annual Alcohol Sales per Hour for On/Club-Licence Outlets

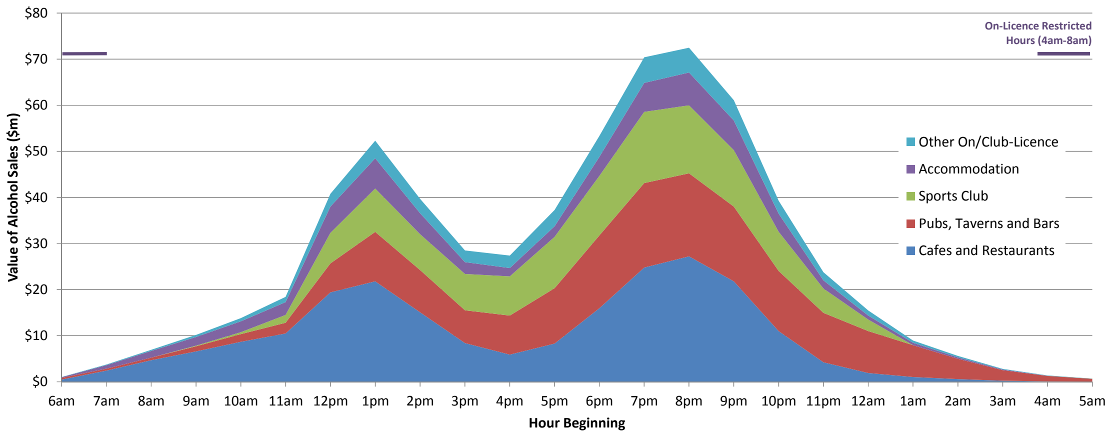
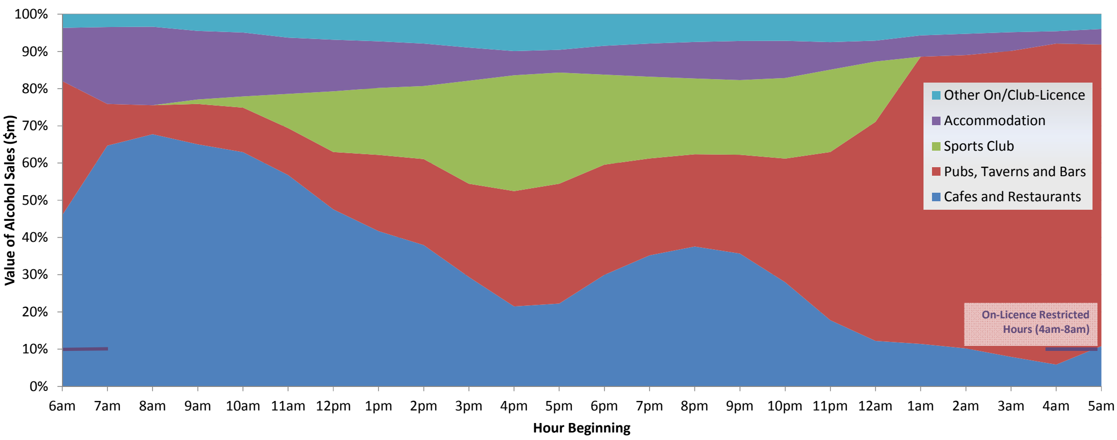


Figure 6.3: Proportion of Total Hourly Alcohol Sales for On/Club-Licence Outlets



6.3 Auckland Alcohol Sales by Hour by Off-Licence Outlets

Off-licence venues follow a rather different sales structure than on/club-licence venues, as explained in section 4.3. Sales grow throughout the day, peaking from 5-6pm, before falling away to very low levels after midnight (Figure 6.4 and Figure 6.5). By outlet type:

- From early morning until lunch time, Supermarkets have the highest value and proportion of sales, while from early afternoon (around 2pm) through to midnight, Liquor stores are the more dominant outlet type.
- Both Supermarkets and Grocery stores, and Liquor stores make their highest value of sales from 5-6pm.
- After midnight, Supermarkets and Grocery stores sell the highest proportion of alcohol.
- See Table A2.2, Appendix 2 for values of sales for each outlet type across the day.

Figure 6.4: Total Annual Alcohol Sales per Hour for Off-Licence Outlets

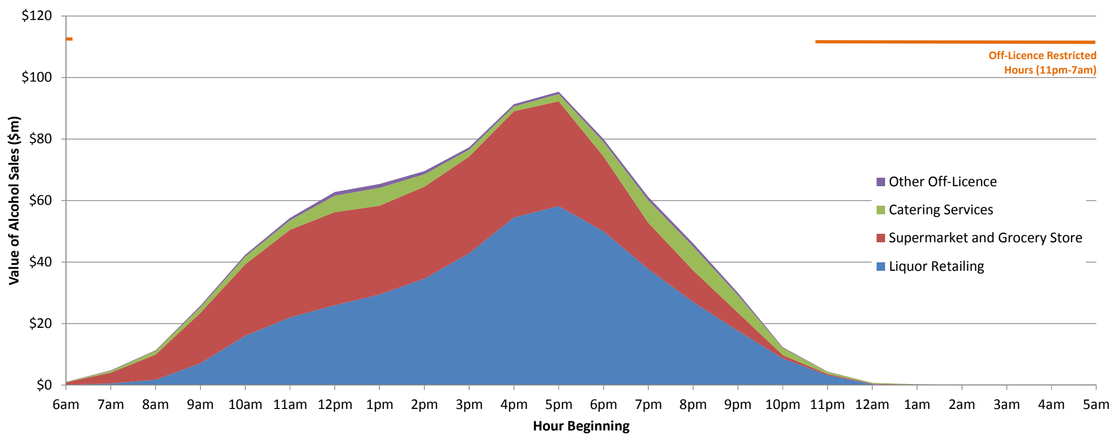
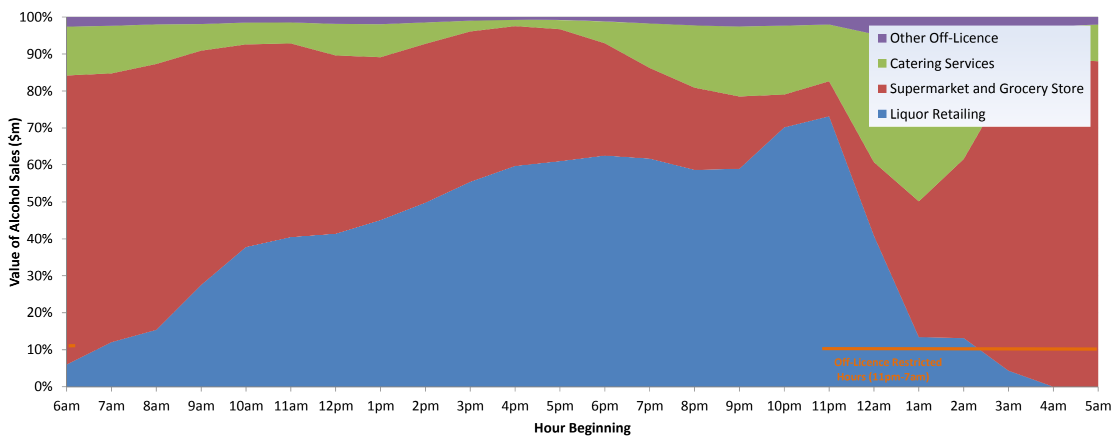


Figure 6.5: Proportion of Total Hourly Alcohol Sales for Off-Licence Outlets



7 Annual Sales by Centre and Outlet

This section summarises total Auckland alcohol sales by centre and outlet type, combining the information from the section 5 and 6 to give a more detailed view of the alcohol sales points (i.e. sales in a centre for a given outlet type) across Auckland, for the 2012 calendar year. The most dominant sales places are those in grouped locations (such as out of centre locations and the centre groupings defined in Auckland Council's assessment as Bunches 28, 29 and 30), although in reality, those aggregations represent many separate individual locations:

- The largest single sales point is Liquor retailers in out of centre locations, with $198.1m in sales (13.5% of Auckland's total sales)
- Sports Clubs outside of centres made $94.9m in sales (6.4% of Auckland's total sales).
- Supermarkets and Grocery stores in centres located in Bunch 28 and Bunch 29, and stores located outside centres have annual sales of $70.2m, $56.7m and $66.8m each respectively (4.8%, 3.9% and 5.4% of Auckland's total sales).
- Cafes & Restaurants outside of centres make sales of $69.6m (4.7% of Auckland's total).

The largest single alcohol sales destination is the CBD, which produces alcohol sales in the Cafes & Restaurants, Accommodation, Liquor Retailing and Supermarkets and Grocery Stores categories of $46.5m, $34.1m, $29.3m and $20.0m respectively, and total alcohol sales of $207m (Table 7.1). In defined centres there are only two other sales points that produce sales of over $10m: Newmarket's Liquor Retailers ($16.5m) and Albany's Supermarkets and Grocery Stores ($13.3m).

Table 7.1: Total Alcohol Sales by Centre and Outlet Type ($m)

	Off Licences					On and Club Licences							
	Liquor Retailing	Supermarket and Grocery Store	Catering Services	Other Off-Licence	Off Licences Sub-Total	Cafes and Restaurants	Pubs, Taverns and Bars	Sports Club	Accommodation	Other On-Licence	Other Club-Licence	On/Club Licences Sub-Total	Total
10 Largest Centres Ranked by Sales													
CBD	$ 29.3	$ 20.0	$ 0.3	$ 1.2	$ 50.8	$ 46.5	$ 68.7	$ 2.5	$ 34.1	$ 4.6	$ 0.3	$ 156.6	$ 207.4
Newmarket	$ 16.5	$ 3.6	$ 0.1	$ 0.3	$ 20.5	$ 7.5	$ 2.4	$ 0.7	$ 0.7	$ 0.5	$ 0.1	$ 11.9	$ 32.4
Ponsonby	$ 8.5	$ 0.7	$ 0.2	$ 0.1	$ 9.3	$ 6.0	$ 6.0	$ 0.4	$ 0.2	$ -	$ -	$ 12.7	$ 22.0
Pukekohe	$ 7.8	$ 8.5	$ -	$ -	$ 16.2	$ 2.4	$ 1.8	$ 0.4	$ 0.0	$ 0.6	$ 0.6	$ 5.7	$ 21.9
New Lynn	$ 4.4	$ 7.7	$ 0.1	$ -	$ 12.2	$ 3.3	$ 1.7	$ 2.8	$ 0.0	$ 0.5	$ 0.4	$ 8.7	$ 20.9
Albany	$ 0.4	$ 13.3	$ -	$ -	$ 13.6	$ 3.3	$ 2.0	$ 0.7	$ 0.1	$ 0.3	$ -	$ 6.3	$ 19.9
Papakura	$ 4.8	$ 7.3	$ -	$ 0.0	$ 12.1	$ 1.3	$ 2.2	$ 1.8	$ 0.0	$ 0.8	$ 0.5	$ 6.6	$ 18.7
Manukau Central	$ 1.2	$ 9.2	$ 0.0	$ 0.0	$ 10.5	$ 4.7	$ 2.2	$ 0.4	$ 0.3	$ 0.3	$ -	$ 7.8	$ 18.2
Botany	$ 1.9	$ 9.3	$ -	$ 0.1	$ 11.2	$ 3.1	$ 3.4	$ -	$ 0.0	$ 0.3	$ -	$ 6.8	$ 18.0
Takapuna	$ 5.9	$ 0.2	$ 0.0	$ 0.1	$ 6.1	$ 4.3	$ 3.5	$ 0.7	$ 1.4	$ 0.7	$ 0.1	$ 10.6	$ 16.7
Sub-total top 10	$ 80.6	$ 79.6	$ 0.7	$ 1.8	$ 162.6	$ 82.5	$ 93.9	$ 10.2	$ 36.8	$ 8.4	$ 1.9	$ 233.6	$ 396.2
Centres with Significant Proportion of Sales from Alcohol													
Parnell	$ 6.8	$ 0.2	$ 0.1	$ -	$ 7.2	$ 2.8	$ 3.3	$ -	$ 0.2	$ 0.1	$ 0.4	$ 6.8	$ 13.9
Onehunga	$ 1.6	$ 1.8	$ 0.2	$ -	$ 3.5	$ 1.0	$ 1.0	$ -	$ 0.0	$ 1.1	$ 0.9	$ 4.0	$ 7.5
Mt Eden Village	$ 2.5	$ 0.3	$ 0.4	$ -	$ 3.3	$ 2.2	$ 0.3	$ 0.4	$ 0.0	$ -	$ -	$ 2.9	$ 6.2
Mission Bay	$ -	$ 0.1	$ -	$ -	$ 0.1	$ 2.3	$ 2.1	$ 0.4	$ -	$ 0.3	$ -	$ 5.0	$ 5.1
Titirangi	$ 2.2	$ 0.8	$ 0.1	$ -	$ 3.0	$ 0.9	$ -	$ -	$ 0.0	$ 0.3	$ 0.4	$ 1.7	$ 4.7
Sub-total these 5	$ 13.1	$ 3.2	$ 0.7	$ -	$ 17.0	$ 9.3	$ 6.6	$ 0.7	$ 0.3	$ 1.8	$ 1.7	$ 20.5	$ 37.5
Centres with Significant Proportion of Sales from Alcohol													
All other Centres	$ 35.9	$ 39.1	$ 2.4	$ 0.3	$ 77.8	$ 20.6	$ 16.3	$ 7.4	$ 0.8	$ 3.0	$ 0.5	$ 48.5	$ 126.3
Bunch 28	$ 43.9	$ 70.2	$ 7.8	$ 0.3	$ 122.2	$ 21.1	$ 15.1	$ 4.6	$ 4.3	$ 3.6	$ 1.5	$ 50.1	$ 172.3
Bunch 29	$ 51.6	$ 56.7	$ 2.5	$ 0.3	$ 111.1	$ 15.0	$ 6.1	$ 3.9	$ 0.2	$ 2.8	$ 3.0	$ 31.0	$ 142.1
Bunch 30	$ 14.7	$ 11.6	$ 0.2	$ 0.5	$ 26.9	$ 2.8	$ 2.2	$ 3.9	$ 0.7	$ 1.5	$ 1.3	$ 12.4	$ 39.3
Outside Centre	$ 198.1	$ 66.8	$ 45.4	$ 9.2	$ 319.6	$ 69.6	$ 36.6	$ 94.9	$ 21.2	$ 11.2	$ 5.9	$ 239.3	$ 558.9
Total	$ 437.9	$ 327.2	$ 59.7	$ 12.4	$ 837.1	$ 221.0	$ 176.9	$ 125.3	$ 64.3	$ 32.2	$ 15.7	$ 635.4	$ 1,472.6

N.B.: cells are formatted so that the largest value for an individual centre in each column is the longest bar, with all other bars proportional

Table 7.2: Share of Auckland's Alcohol Sales by Centre by Outlet Type

	Off Licences					On and Club Licences							Total
	Liquor Retailing	Supermarket and Grocery Store	Catering Services	Other Off-Licence	Off Licences Sub-Total	Cafes and Restaurants	Pubs, Taverns and Bars	Sports Club	Accommodation	Other On-Licence	Other Club-Licence	On/Club Licences Sub-Total	
10 Largest Centres Ranked by Sales													
CBD	2.0%	1.4%	0.0%	0.1%	3%	3.2%	4.7%	0.2%	2.3%	0.3%	0.0%	11%	14%
Newmarket	1.1%	0.2%	0.0%	0.0%	1%	0.5%	0.2%	0.0%	0.0%	0.0%	0.0%	1%	2%
Ponsonby	0.6%	0.0%	0.0%	0.0%	1%	0.4%	0.4%	0.0%	0.0%	0.0%	0.0%	1%	1%
Pukekohe	0.5%	0.6%	0.0%	0.0%	1%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0%	1%
New Lynn	0.3%	0.5%	0.0%	0.0%	1%	0.2%	0.1%	0.2%	0.0%	0.0%	0.0%	1%	1%
Albany	0.0%	0.9%	0.0%	0.0%	1%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0%	1%
Papakura	0.3%	0.5%	0.0%	0.0%	1%	0.1%	0.2%	0.1%	0.0%	0.1%	0.0%	0%	1%
Manukau Central	0.1%	0.6%	0.0%	0.0%	1%	0.3%	0.2%	0.0%	0.0%	0.0%	0.0%	1%	1%
Botany	0.1%	0.6%	0.0%	0.0%	1%	0.2%	0.2%	0.0%	0.0%	0.0%	0.0%	0%	1%
Takapuna	0.4%	0.0%	0.0%	0.0%	0%	0.3%	0.2%	0.0%	0.1%	0.0%	0.0%	1%	1%
Sub-total top 10	5%	5%	0%	0%	11%	6%	6%	1%	3%	1%	0%	16%	27%
Centres with Significant Proportion of Sales from Alcohol													
Parnell	0.5%	0.0%	0.0%	0.0%	0%	0.2%	0.2%	0.0%	0.0%	0.0%	0.0%	0%	1%
Onehunga	0.1%	0.1%	0.0%	0.0%	0%	0.1%	0.1%	0.0%	0.0%	0.1%	0.1%	0%	1%
Mt Eden Village	0.2%	0.0%	0.0%	0.0%	0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	0%
Mission Bay	0.0%	0.0%	0.0%	0.0%	0%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0%	0%
Titirangi	0.1%	0.1%	0.0%	0.0%	0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	0%
Sub-total these 5	1%	0%	0%	0%	1%	1%	0%	0%	0%	0%	0%	1%	3%
Centres with Significant Proportion of Sales from Alcohol													
All other Centres	2.4%	2.7%	0.2%	0.0%	5%	1.4%	1.1%	0.5%	0.1%	0.2%	0.0%	3%	9%
Bunch 28	3.0%	4.8%	0.5%	0.0%	8%	1.4%	1.0%	0.3%	0.3%	0.2%	0.1%	3%	12%
Bunch 29	3.5%	3.8%	0.2%	0.0%	8%	1.0%	0.4%	0.3%	0.0%	0.2%	0.2%	2%	10%
Bunch 30	1.0%	0.8%	0.0%	0.0%	2%	0.2%	0.2%	0.3%	0.0%	0.1%	0.1%	1%	3%
Outside Centre	13.5%	4.5%	3.1%	0.6%	22%	4.7%	2.5%	6.4%	1.4%	0.8%	0.4%	16%	38%
Total	30%	22%	4%	1%	57%	15%	12%	9%	4%	2%	1%	43%	100%

N.B.: cells are formatted so that the largest value for an individual centre in each column is the longest bar, with all other bars proportional

8 Alcohol Sales during Restricted Hours of Trade

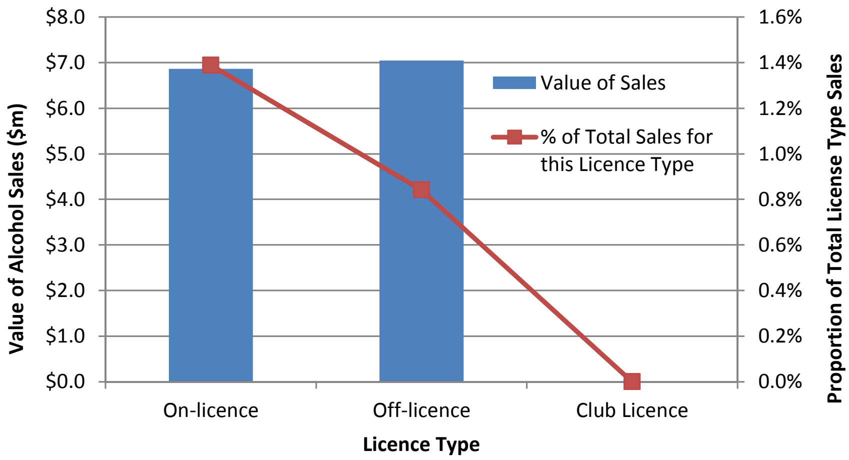
This section identifies the total value of sales currently made during the proposed restricted hours of trade in licensed venues in Auckland to provide an indication of quantum of sales that could potentially be affected by changing current hours of trade. The sales identified in this section do not necessarily represent the sales that would likely be lost as a result of restricting the hours of trade of these businesses, given the range of potential responses from consumers and businesses to any change in hours. For example, customers may transfer sales currently made during this time to other times in the event of restrictions, and business may adopt some response in an attempt to mitigate any enforced change of trading hours. The effect of those potential responses is to be assessed in the Stage 2 report.

8.1 Industry Sales during Restricted Hours of Trade

During the proposed restricted hours of trade (4am to 8am for on-licences, and 11pm to 7am for off-licences), alcohol sales across Auckland in 2012 were $13.9m, or 0.94% of Auckland's total alcohol sales made at all times. This is comprised of:

- $6.9m from on-licence venues (1.39% of total on-licence sales)
- $7.0m form off-licence venues (0.84% of total off-licence sales)
- No sales from club licence venues are expected to be removed with the implementation of the default restricted hours of trade (Figure 8.1).

Figure 8.1: Alcohol Sales during Restricted Time Period for Each Licence Type



8.2 Sales by Centre during Restricted Hours of Trade

8.2.1 Total Sales

The Auckland CBD is very dominant in alcohol saes made during the restricted hours of trade (Figure 8.2 and Figure 8.3):

- The CBD is the individual centre with the highest value ($6.6m) and proportion (3.2%) of its total alcohol sales during the restricted hours of trade.
- 46.7% of all sales during the restricted hours of trade in Auckland are made in the CBD.
- Of other individual centres Mt. Wellington/Sylvia Park has the second highest level of sales during the restricted hours of trade with $0.3m (2.2% of its alcohol sales), or 2.2% of Auckland's total alcohol sales during the restricted hours of trade.
- Of the remaining individual centres, only four others have alcohol sales during the restricted hours of trade greater than 1% of the centre's total sales. These are Parnell (2.0%), Mt. Eden Village (1.5%), Onehunga (1.4%) and Eden Terrace (1.2%).

Figure 8.2: Alcohol Sales during Restricted Hours of Trade (All Centres)

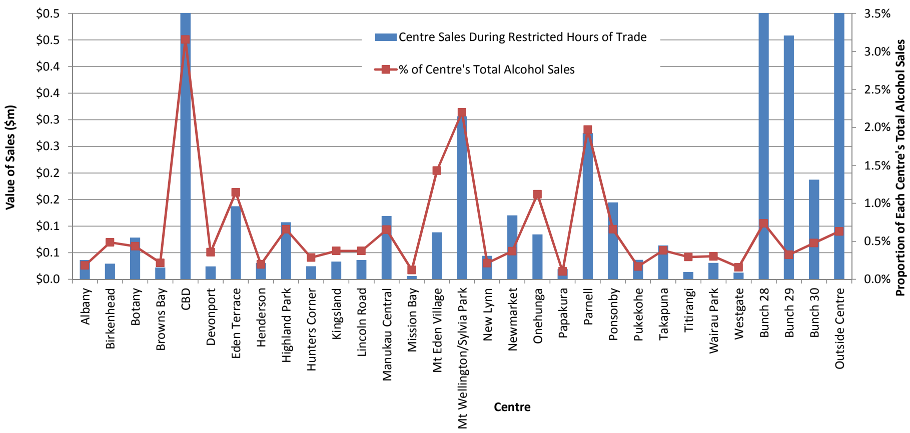
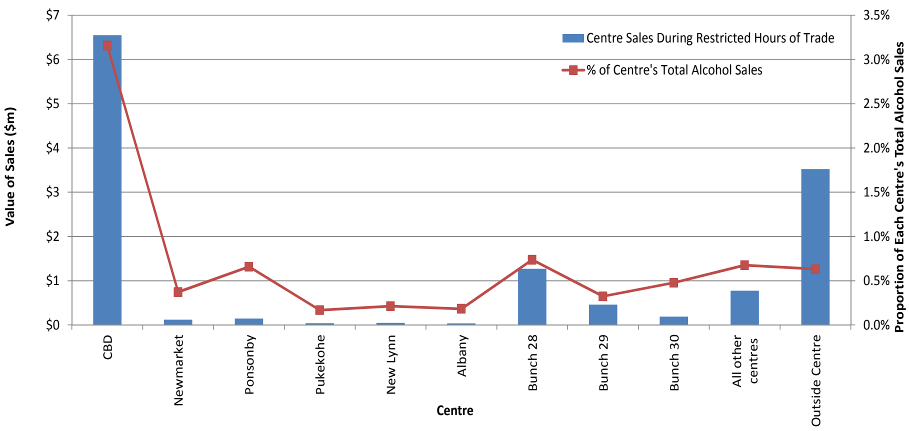


Figure 8.3: Alcohol Sales during Restricted Hours of Trade (Selected Centres)



8.2.2 On/Club-Licence Sales

The restricted hours of trade for on/club-licence venues are 4am-8am. Figure 8.4 shows the total value of sales per hour per centre made during the restricted hours of trade, and Figure 8.5 shows the proportion of total sales at each time made in each location. On-licence venues in the CBD are likely to be affected the most by the implementation of the restricted hours of trade, with other individual centres affected only to a much smaller degree.

Figure 8.4: On/Club-Licence Alcohol Sales during the Restricted Hours of Trade

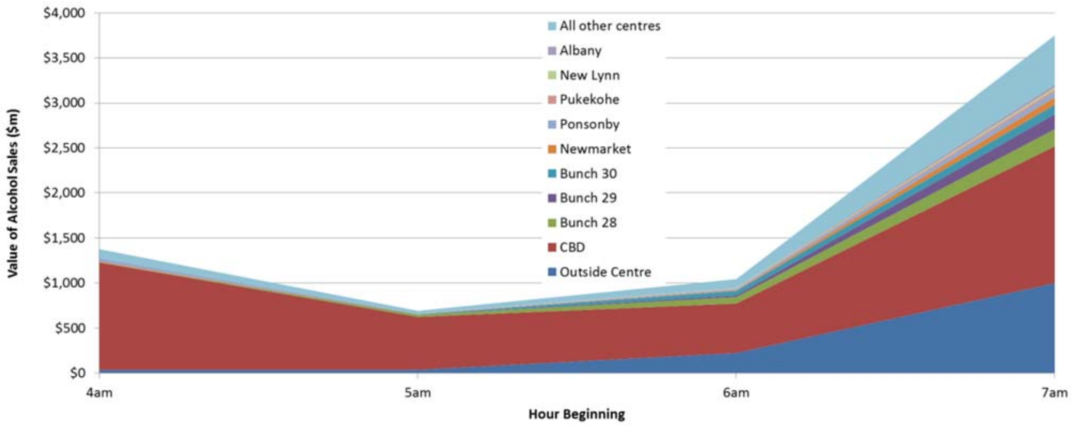
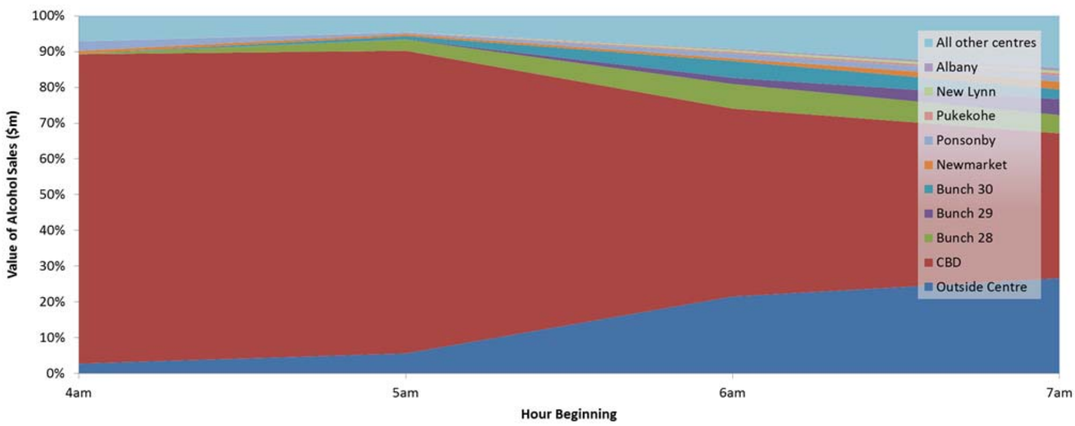


Figure 8.5: Proportion of On/Club-Licence Alcohol Sales during the Restricted Hours of Trade



8.2.3 Off-Licence Sales

The restricted hours of trade for off-licence venues are 11pm-7am. Figure 8.4 shows the total value of sales per hour per centre which will be affected and Figure 8.5 shows the proportion each centre shares of the total sales affected for off-licence venues by the restricted hours of trade. Like the impact on on-licence venues, overall the CBD has the highest value of sales during this period, although other centres have greater sales during the period than is the case for on-licence sales, particularly in early morning trading (after 5am).

Figure 8.6: Total Off-Licence Alcohol Sales during the Restricted Hours of Trade

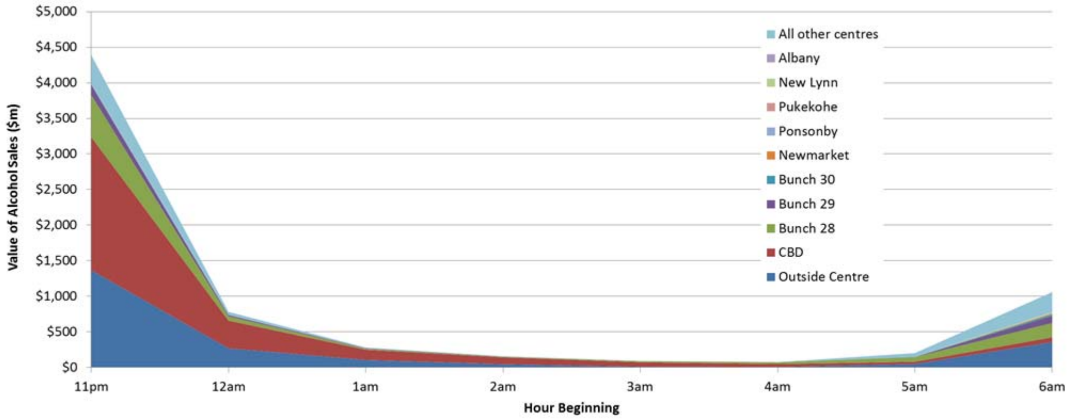
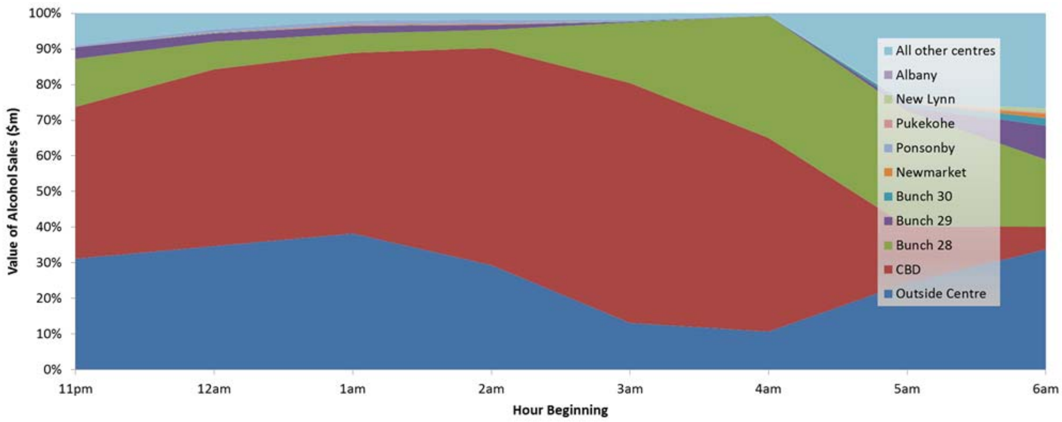


Figure 8.7: Proportion of Off-Licence Alcohol Sales per Centre during the Restricted Hours of Trade



8.3 Sales by Outlet during the Restricted Hours of Trade

8.3.1 Total Sales

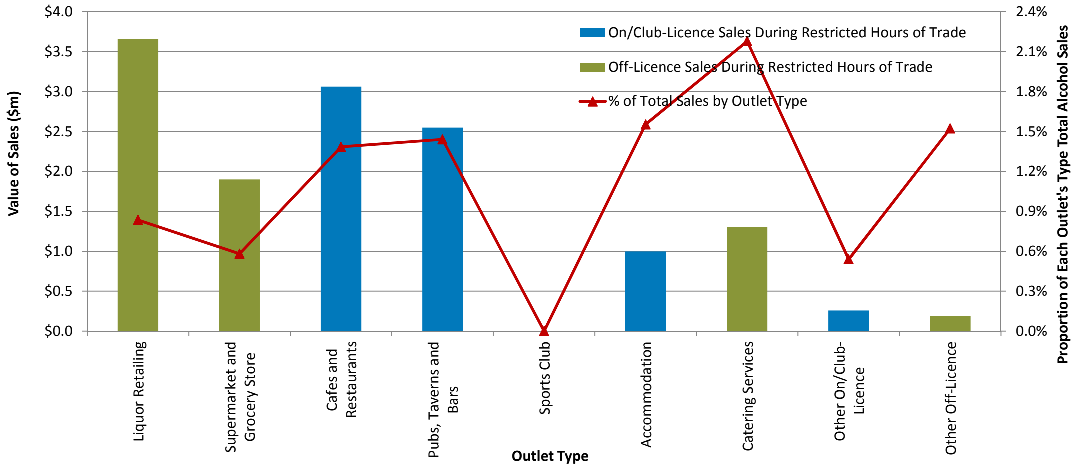
Liquor retailing (off-licence) is the outlet type with the greatest value of sales during the restricted hours of trade, with $3.7m, or 25.7% of Auckland's total alcohol sales during the restricted hours of trade (Figure 8.8). This $3.7m accounts for 0.8% of Liquor retailing's alcohol sales made at all times. Other outlet types with the largest value of sales during the restricted hours of trade are:

- Cafés & Restaurants (on-licence), with $3.06m (21.5% of Auckland's restricted hour sales), which accounts for 1.4% of their total alcohol sales.
- Pubs, Taverns and Bars (on-licence), $2.5m of alcohol sales in this time (17.9% of Auckland's restricted hour sales).
- Supermarkets and Grocery stores (off-licence) make alcohol sales of just over $1.9m in sales during the restricted hours of trade (13.4% of Auckland restricted hour

alcohol sales). This $1.9m is less than 1.5% of total alcohol sales for all these outlet types.

- The only other outlet types with sales over $1m during this time include Accommodation and Catering services ($1.0m and $1.3m respectively), and all other types have sales during the restricted hours of less than $0.3m.

Figure 8.8: Total Alcohol Sales per Outlet Type during the Restricted Hours of Trade



8.3.2 On/Club-Licence Sales

Figure 8.9 shows the amount of sales made by Auckland's on/club-licenced outlets during the restricted hours of trade, and Figure 8.10 shows the proportion of sales per hour made by each outlet type. Pubs, Taverns and Bars are responsible for 85% of sales made by on/club licence outlets from 4-6am, while from 6-8am the Cafes and Restaurants dominate sector sales (Figure 8.9 and Figure 8.10).

Figure 8.9: On/Club-Licence Alcohol Sales during the Restricted Hours of Trade

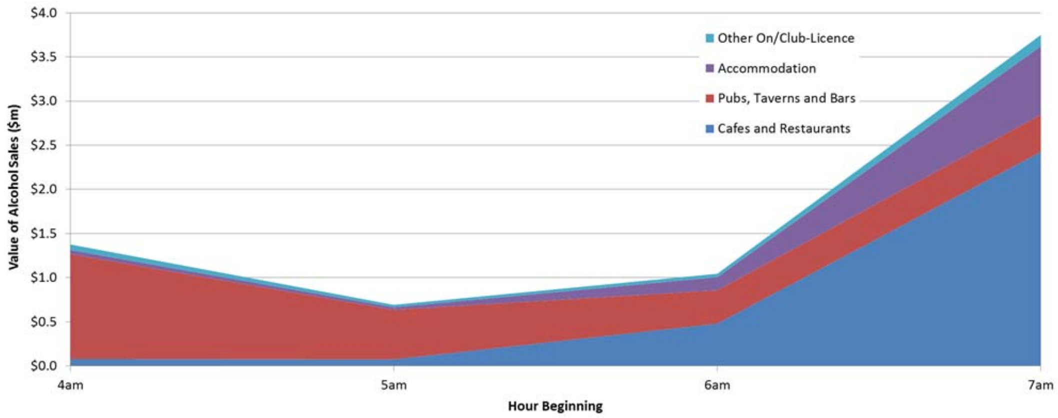
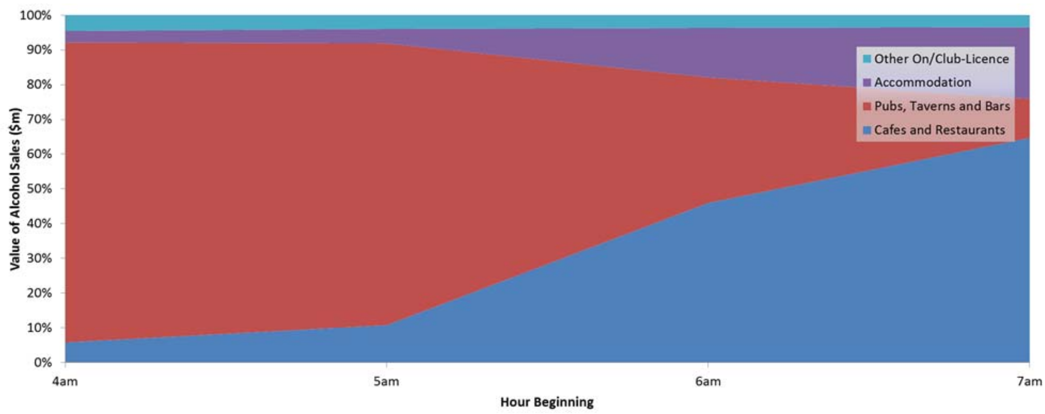


Figure 8.10: Proportion of On/Club-Licence Alcohol Sales during the Restricted Hours of Trade



8.3.3 Off-Licence Sales

Figure 8.11 shows the amount of sales made by Auckland's off-licenced outlets during the restricted hours of trade and Figure 8.12 shows the proportion of Auckland's total off-licence sales per hour made by each outlet type. The potential impact of restricted hours of trade on off-licence venues differs by outlet type, and can be looked at in three periods: late night (11pm-1am), early morning (5-7am) and the time in between (1-5am).

The restriction on late night trading will have the largest impact on Liquor stores, with much smaller levels of sales being made by Supermarkets and Catering Services businesses in this period. The restriction on early morning trading will have the largest effect on Supermarkets and Grocery stores, with other off-licence outlet types accounting for only around 10% of sales during this time. Very low levels of sales are made across all of Auckland by off-licence outlets between 1am and 5am, with only $0.6m per year made in that period across all of Auckland. The greatest proportion of sales over that time is made in Supermarkets, many of which are open 24 hours, and which peak in their market share at 80-90% between 3-6am.

Figure 8.11: Total Off-Licence Outlet Alcohol Sales during the Restricted Hours of Trade

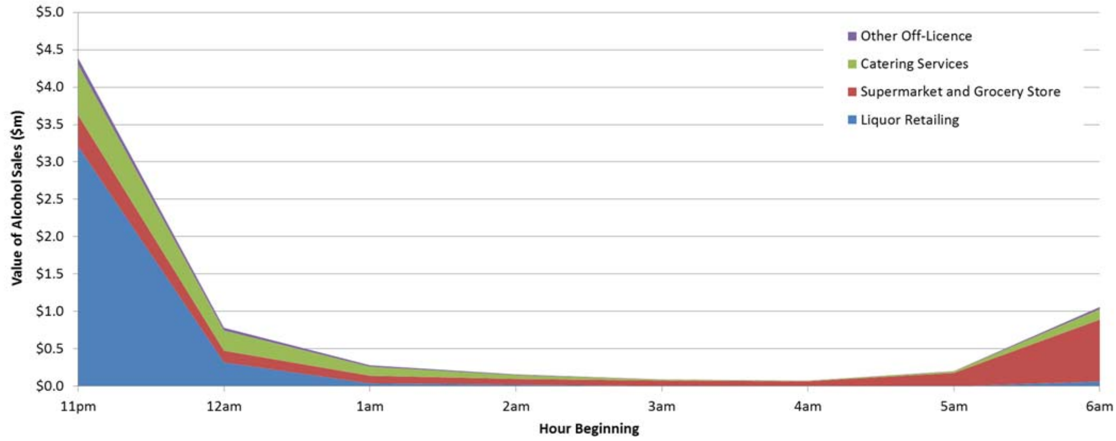
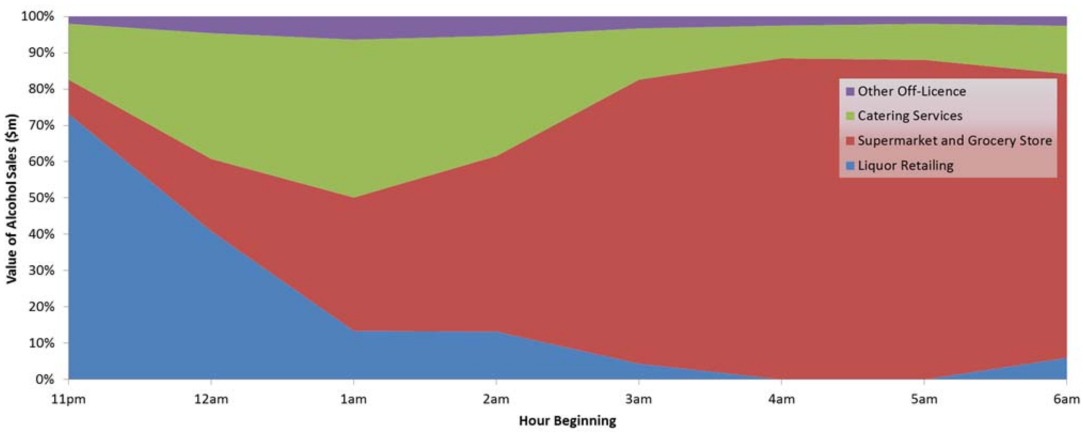


Figure 8.12: Proportion of Off-Licence Outlet Sales during the Restricted Hours of Trade



8.4 Sales by Centre by Outlet Type during Restricted Hours of Trade

This section combines output from sections 8.2 and 8.3 to show alcohol sales during the restricted hours of trade by centre and outlet type to establish which outlet types in which centres will be most affected by the trade restrictions.

In total, $13.9m of alcohol sales in Auckland in 2012 were made during the default restricted hours of trade. The largest single contributor to this (in terms of outlet type crossed by location) impact was the CBD's Pubs, Taverns and Bars (on-licence venues), which together made $2.3m in alcohol sales during the restricted hours of trade, which represents 16.7% of total alcohol sales in this period. That $2.3m represents 3.4% of the alcohol sales made by these businesses at all times.

The other most significant shares of sales during the restricted hours of trade also occurred in the CBD, with Liquor Retailing (off-licence), Cafes and Restaurants (on-licence), Supermarkets (off-licence) and Accommodation (on-licence) individually accounting for 13.4%, 5.8%, 5.6% and 4.3% of Auckland's alcohol sales made during this time. The shares of the alcohol sales made by these businesses at all times are respectively 6.4%, 1.8%, 3.9% and 1.8%. As noted above, the CBD makes nearly half of all alcohol sales during the restricted hours of trade.

These same outlet types also account for almost 25% of sales during the restricted hours of trade outside of centres.

Table 8.1 below summarises the total value of sales for each outlet type, in each centre, during the restricted hours of trade, and Table 8.2 expresses each cell from that table as a proportion of the total $13.9m sales during the restricted hours of trade.

Table 8.1: Total Alcohol Sales during Restricted Hours of Trade by Centre by Outlet Type

	Off Licences					On and Club Licences							Total
	Liquor Retailing	Supermarket and Grocery Store	Catering Services	Other Off-Licence	Off Licences Sub-Total	Cafes and Restaurants	Pubs, Taverns and Bars	Sports Club	Accommodation	Other On-Licence	Other Club-Licence	On/Club Licences Sub-Total	
10 Largest Centres Ranked by Sales													
CBD	$ 1.87	$ 0.78	$ 0.03	$ 0.03	$ 2.7	$ 0.81	$ 2.32	$ -	$ 0.60	$ 0.11	$ -	$ 3.8	$ 6.5
Newmarket	$ 0.00	$ 0.01	$ 0.00	$ 0.00	$ 0.0	$ 0.08	$ 0.01	$ -	$ 0.01	$ 0.01	$ -	$ 0.1	$ 0.1
Ponsonby	$ 0.00	$ 0.01	$ 0.01	$ 0.00	$ 0.0	$ 0.07	$ 0.04	$ -	$ 0.00	$ -	$ -	$ 0.1	$ 0.1
Pukekohe	$ 0.00	$ 0.00	$ -	$ -	$ 0.0	$ 0.03	$ -	$ -	$ 0.00	$ 0.00	$ -	$ 0.0	$ 0.0
New Lynn	$ -	$ 0.01	$ 0.00	$ -	$ 0.0	$ 0.02	$ 0.01	$ -	$ 0.00	$ 0.00	$ -	$ 0.0	$ 0.0
Albany	$ 0.00	$ 0.00	$ -	$ -	$ 0.0	$ 0.03	$ -	$ -	$ 0.00	$ 0.00	$ -	$ 0.0	$ 0.0
Papakura	$ 0.00	$ 0.00	$ -	$ -	$ 0.0	$ 0.02	$ -	$ -	$ 0.00	$ -	$ -	$ 0.0	$ 0.0
Manukau Central	$ 0.00	$ 0.00	$ 0.00	$ -	$ 0.0	$ 0.10	$ 0.00	$ -	$ 0.01	$ 0.01	$ -	$ 0.1	$ 0.1
Botany	$ 0.00	$ 0.00	$ -	$ 0.00	$ 0.0	$ 0.07	$ 0.00	$ -	$ 0.00	$ 0.01	$ -	$ 0.1	$ 0.1
Takapuna	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.0	$ 0.04	$ -	$ -	$ 0.01	$ 0.01	$ -	$ 0.1	$ 0.1
Sub-total top 10	$ 1.9	$ 0.8	$ 0.0	$ 0.0	$ 2.8	$ 1.3	$ 2.4	$ -	$ 0.6	$ 0.1	$ -	$ 4.4	$ 7.2
Centres with Significant Proportion of Sales from Alcohol													
Parnell	$ 0.23	$ 0.01	$ 0.00	$ -	$ 0.2	$ 0.03	$ 0.00	$ -	$ 0.00	$ 0.00	$ -	$ 0.0	$ 0.3
Onehunga	$ 0.00	$ 0.01	$ 0.01	$ -	$ 0.0	$ 0.01	$ 0.03	$ -	$ 0.00	$ 0.02	$ -	$ 0.1	$ 0.1
Mt Eden Village	$ 0.02	$ 0.01	$ 0.01	$ -	$ 0.0	$ 0.05	$ 0.00	$ -	$ 0.00	$ -	$ -	$ 0.1	$ 0.1
Mission Bay	$ -	$ 0.00	$ -	$ -	$ 0.0	$ 0.00	$ 0.00	$ -	$ -	$ 0.00	$ -	$ 0.0	$ 0.0
Titirangi	$ 0.00	$ 0.00	$ 0.00	$ -	$ 0.0	$ 0.01	$ -	$ -	$ 0.00	$ -	$ -	$ 0.0	$ 0.0
Sub-total these 5	$ 0.2	$ 0.0	$ 0.0	$ -	$ 0.3	$ 0.1	$ 0.0	$ -	$ 0.0	$ 0.0	$ -	$ 0.2	$ 0.5
Centres with Significant Proportion of Sales from Alcohol													
All other Centres	$ 0.09	$ 0.33	$ 0.04	$ 0.00	$ 0.5	$ 0.24	$ 0.07	$ -	$ 0.01	$ 0.02	$ -	$ 0.3	$ 0.8
Bunch 28	$ 0.50	$ 0.31	$ 0.18	$ 0.00	$ 1.0	$ 0.23	$ 0.00	$ -	$ 0.05	$ 0.01	$ -	$ 0.3	$ 1.3
Bunch 29	$ 0.11	$ 0.10	$ 0.06	$ 0.00	$ 0.3	$ 0.17	$ 0.01	$ -	$ 0.00	$ 0.01	$ -	$ 0.2	$ 0.5
Bunch 30	$ 0.00	$ 0.02	$ 0.00	$ 0.01	$ 0.0	$ 0.12	$ 0.00	$ -	$ 0.03	$ 0.01	$ -	$ 0.2	$ 0.2
Outside Centre	$ 0.83	$ 0.29	$ 0.95	$ 0.15	$ 2.2	$ 0.92	$ 0.05	$ -	$ 0.28	$ 0.05	$ -	$ 1.3	$ 3.5
Total	$ 3.7	$ 1.9	$ 1.3	$ 0.2	$ 7.0	$ 3.1	$ 2.5	$ -	$ 1.0	$ 0.3	$ -	$ 6.9	$ 13.9

N.B.: cells are formatted so that the largest value for an individual centre in each column is the longest bar, with all other bars proportional

Table 8.2: Share of Auckland's Alcohol Sales during Restricted Hours of Trade by Centre by Outlet Type

	Off Licences					On and Club Licences							
	Liquor Retailing	Supermarket and Grocery Store	Catering Services	Other Off-Licence	Off Licences Sub-Total	Cafes and Restaurants	Pubs, Taverns and Bars	Sports Club	Accommodation	Other On-Licence	Other Club-Licence	On/Club Licences Sub-Total	Total
10 Largest Centres Ranked by Sales													
CBD	13.4%	5.6%	0.2%	0.2%	19%	5.8%	16.7%	0.0%	4.3%	0.8%	0.0%	28%	47%
Newmarket	0.0%	0.1%	0.0%	0.0%	0%	0.5%	0.1%	0.0%	0.0%	0.0%	0.0%	1%	1%
Ponsonby	0.0%	0.1%	0.1%	0.0%	0%	0.5%	0.3%	0.0%	0.0%	0.0%	0.0%	1%	1%
Pukekohe	0.0%	0.0%	0.0%	0.0%	0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	0%
New Lynn	0.0%	0.1%	0.0%	0.0%	0%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0%	0%
Albany	0.0%	0.0%	0.0%	0.0%	0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	0%
Papakura	0.0%	0.0%	0.0%	0.0%	0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	0%
Manukau Central	0.0%	0.0%	0.0%	0.0%	0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	1%	1%
Botany	0.0%	0.0%	0.0%	0.0%	0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	1%	1%
Takapuna	0.0%	0.0%	0.0%	0.0%	0%	0.3%	0.0%	0.0%	0.1%	0.0%	0.0%	0%	0%
Sub-total top 10	13%	6%	0%	0%	20%	9%	17%	0%	5%	1%	0%	32%	52%
Centres with Signi	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	0%
Parnell	1.7%	0.1%	0.0%	0.0%	2%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	2%
Onehunga	0.0%	0.1%	0.1%	0.0%	0%	0.1%	0.2%	0.0%	0.0%	0.2%	0.0%	0%	1%
Mt Eden Village	0.1%	0.0%	0.1%	0.0%	0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	1%
Mission Bay	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	0%
Titirangi	0.0%	0.0%	0.0%	0.0%	0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	0%
Sub-total these 5	2%	0%	0%	0%	2%	1%	0%	0%	0%	0%	0%	1%	3%
Centres with Signi	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	0%
All other Centres	0.7%	2.4%	0.3%	0.0%	3%	1.7%	0.5%	0.0%	0.1%	0.1%	0.0%	2%	6%
Bunch 28	3.6%	2.2%	1.3%	0.0%	7%	1.7%	0.0%	0.0%	0.3%	0.1%	0.0%	2%	9%
Bunch 29	0.8%	0.7%	0.4%	0.0%	2%	1.2%	0.1%	0.0%	0.0%	0.0%	0.0%	1%	3%
Bunch 30	0.0%	0.1%	0.0%	0.1%	0%	0.9%	0.0%	0.0%	0.2%	0.1%	0.0%	1%	1%
Outside Centre	6.0%	2.1%	6.8%	1.1%	16%	6.6%	0.4%	0.0%	2.0%	0.3%	0.0%	9%	25%
Total	26%	14%	9%	1%	51%	22%	18%	0%	7%	2%	0%	49%	100%

N.B.: cells are formatted so that the largest value for an individual centre in each column is the longest bar, with all other bars proportional

8.5 Impact at an Individual Business Level

By comparing the number of licenced outlets in each location we have provided below a high-level indication of how individual businesses in defined centres may be impacted by the implementation of the restricted hours of trade. This summary focusses on the few most heavily impact cells in Table 8.1, as described in section 8.4. Note that as not all businesses are open in all of the hours for which they are licensed, this provides only an indication of the degree to which each individual business may be affected. In reality some of the businesses will not actually be open during the restricted hours of trade, and therefore will not be affected at all, and others will be affected to a greater degree than the indicative average provide below.

Of these individual outlet types, the four supermarket and grocery stores in the CBD in aggregate make $800,000 in alcohol sales during the restricted hours of trade, or just under $200,000 each (Table 8.3). The next largest sales amount per business type is CBD Liquor Retailers ($89,000 each), and supermarket and grocery stores in Mt Wellington/Sylvia Park ($80,000 each). Note that these sales levels do not necessarily represent sales that would be lost as a result of restricting the hours of trade of these businesses, given that customers may transfer sales during this time to other times in the event of restrictions. That effect is to be assessed in the Stage 2 report.

Table 8.3: Potential Impact of Restricted Hours of Trade at a Business Level

Centre Name	Outlet Type	Value of Sales during Restricted Hours of Trade ($m)*	Number of Businesses/ Licensees**
CBD	Pubs, Taverns and Bars	$ 2.3	48
CBD	Liquor Retailing	$ 1.9	21
CBD	Cafes and Restaurants	$ 0.8	286
CBD	Supermarkets and Grocery Stores	$ 0.8	4
CBD	Accommodation	$ 0.6	22
Mt Wellington/ Sylvia Park	Supermarkets and Grocery Stores	$ 0.3	3

** Value of sales is not equivalent to profits, as operating costs to the business would also likely be reduced.*

*** This represents the total number of businesses licensed to operate at any time during the restricted hours of trade. and does not necessarily reflect the number of businesses operating during this time.*

9 Economic Impact of Removing Sales from the Restricted Hours of Trade

To determine the overall economic impact on Auckland of removing alcohol sales made during the restricted hours of trade, the outlet types were grouped into their wider industries, i.e. retail and hospitality. Vineyards were excluded as they do not fit into either of these categories, and the low value of sales during this time period (<1% of total sales during the restricted hours of trade) will have an indistinguishable impact when the related industry is adjusted to remove the value of these sales.

Retail sales during the restricted hours of trade are estimated to be $5.6m and Hospitality sales are estimated to be $8.2m which is respectively 0.088% and 0.437% of each sector's total Auckland gross output (Table 9.1). The restricted hours of trade are relatively more important to the Hospitality sector than to Retail, as the former makes a share of its total sales during this time period that is five times greater than the latter.

Table 9.1: Impact on Total Output of Sales during Restricted Hours of Trade

Sector	Alcohol Sales during Restricted Hours of Trade ($m)	Proportion of Total Sector Output
Retail	$ 5.60	0.088%
Hospitality	$ 8.20	0.437%

As shown in Table 9.2, if all these sales were removed from the economy, and assuming that the sales are not transferred to any other place, at any other time, the impact on Auckland's Gross Output would be a decrease of -0.018%, and the impact on Value Added (equivalent to GDP) would be -0.023%.

Table 9.2: Economic Impact of Sales during Restricted Hours of Trade

Economic Impact Measure	Proportional Impact on Auckland's Economy
Gross Output	-0.018%
Value Added (GDP)	-0.023%

10 Conclusion

The Auckland alcohol industry is worth $1.47bn[6]. There are 3,214 venues licenced for the sale of alcohol across the Auckland region. This is made up of 1,958 on-licence, 856 off-licence and 400 club licence venues. Annually on-licence venues have sales of $494m, off-licence venues have sales of $837m and club licence venues have sales of $141m.

Auckland centres contain 1,413 on-licence, 437 off-licence and 110 club-licence venues (72%, 51% and 28% of each licence type's total Auckland licence count respectively). The CBD has the highest number of total licences of any individual centre with 578 licences, or 18% of all Auckland's licences. Auckland centres make total alcohol sales of $914m annually (62% of Auckland's total alcohol sales). The CBD has the highest value of sales with $207m (14% of Auckland's total sales), followed by Newmarket with $32m, then Ponsonby, Pukekohe, New Lynn and Albany, all with sales between $20-22m.

Although many types of outlet sell alcohol, sales are dominated by a small number of outlet types. Liquor Retailing has the highest value of sales with $438m (29.7% of Auckland's total sales), followed by Supermarkets and Grocery Stores ($327m, 22.2%), Cafes and Restaurants ($221m, 15.0%), and Pubs, Taverns and Bars ($177m, 12.0%). Sports Clubs is the only other outlet type to have sales in excess of $100m, with $125m (8.5% of Auckland's total sales).

Currently, there is no default restriction on the time at which alcohol sales are permitted, and sales are made in at least some parts of Auckland across the entire day. Sales peak during the evening, with a smaller peak in sales around lunchtime, although, different outlet types and different locations have different sales structures and make varying shares of their sales at each time of the day. This means that any restriction on licensed hours of trade will have differing levels of impact on these different alcohol sales points across Auckland.

Currently $13.9m of alcohol sales are made in Auckland during the time that will be restricted hours of trade under the SSAA. This does not necessarily represent the amount of sales that would be lost as a result of restricting the hours of trade of these businesses, as customers may transfer sales during this time to other times in the event of restrictions.

If all of the sales within the restricted hours of trade were to be lost as a result of the imposition of those restricted trading hours, the largest single impact would be likely to be on the CBD's Pubs, Taverns and Bars, where sales in the restricted hours of trade ($2.3m) equate to 3.4% of total alcohol sales by those outlets in the CBD. That $2.3m is 16.7% of total alcohol sales made during the restricted hours of trade.

Other large impacts also occur in the CBD, with 6.4%, of the total alcohol sales made by Liquor Retailing made in the restricted hours of trade, and between 3% and 4% of sales made by Supermarkets and Clubs and just under 2% of the sales made by Accommodation and Cafes and Restaurants made during these times.

[6] Based on the 2012 M.E National Alcohol Sales Model.

Together Pubs, Taverns and Bars, Liquor Retailing, Cafes and Restaurants, Supermarkets and Accommodation account for almost 45% of all alcohol sales made during these restricted hours in the CBD, and almost 25% outside of centres. It needs to be noted that it is not only late evening sales that will be affected, Supermarkets and Grocery stores will also lose sales from their early morning shoppers, given the default trading commencement time of 7am for off-licences.

The economic impacts of removing the $13.9m in restricted hour trade sales from the economy would effectively have a negative impact of -0.018% of Auckland's Gross Output, and a negative impact of -0.023% on Auckland's Value Added. We note that those impacts do not necessarily represent the likely impacts that would result from restricted hours of trade, given they make no allowance for transferral of sales during this time to other times in the event of restrictions. That effect is to be assessed in the Stage 2 report.

Appendix 1: Bunched Centre Definition

Bunched Centre Name	Description	Included Centres
Bunch 28	Remaining Major Urban Centres	Eden Valley, St Lukes, Royal Oak, Panmure/Mt Wellington LFR, Orewa, Otahuhu, Manurewa, Greenlane, Remuera, Whangaparaoa, Mt Albert, Milford, Glenfield, Mangere, Glen Innes, Otara, Pakuranga, Northcote, Howick and Auckland Airport
Bunch 29	Remaining Minor Urban Centres	Balmoral, Ellerslie, St Heliers, Pt Chevalier, Mairangi Bay, Lynfield, Meadowlands, Mt Roskill, Te Atatu South, Sandringham, Kelston, Avondale, Te Atatu, Glen Eden, Mangere Bridge, Hauraki Corner, Torbay, Takanini, Mangere East Village, Papatoetoe, Blockhouse Bay, Mokoia Road Shops, Royal Heights, Three Kings, Meadowbank, Stoddard Road, Grey Lynn, Clendon, Dawson Road, Eastridge, Green Bay and Sunnynook
Bunch 30	Remaining Rural/Satellite Centres	Clevedon, Helensville, Kumeu/Huapai, Matakana, Silverdale LFR, Silverdale Village, Waimauku, Waiuku, Warkworth and Wellsford

Appendix 2: Sales by Centre and Outlet Detail

Table A2.1: Total Auckland Alcohol Sales per Hour by Outlet Type ($m)

Hour Beginning	Albany	Birkenhead	Botany	Browns Bay	CBD	Devonport	Eden Terrace	Henderson	Highland Park	Hunters Corner	Kingsland	Lincoln Road	Manukau Central	Mission Bay	Mt Eden Village	Mt Wellington/ Sylvia Park	New Lynn	Newmarket	Onehunga	Papakura	Parnell	Ponsonby	Pukekohe	Takapuna	Titirangi	Wairau Park	Westgate	Bunch 28	Bunch 29	Bunch 30	Outside Centre	Total Auckland Sales
6am	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.1	0.1	0.6	2.2
7am	0.1	0.1	0.1	0.1	1.9	0.0	0.1	0.1	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.4	0.1	0.2	0.0	0.0	0.0	0.1	0.1	0.1	0.0	0.0	0.0	0.8	1.0	0.2	2.7	9
8am	0.3	0.1	0.3	0.2	3.3	0.1	0.1	0.2	0.2	0.2	0.1	0.2	0.3	0.0	0.1	0.5	0.3	0.4	0.1	0.2	0.1	0.1	0.3	0.2	0.0	0.0	0.1	2.6	1.8	0.5	5.5	18
9am	0.8	0.2	0.6	0.3	4.3	0.2	0.2	0.5	0.4	0.3	0.2	0.3	0.7	0.0	0.1	0.5	0.6	1.1	0.2	0.6	0.1	0.3	0.7	0.4	0.1	0.1	0.3	5.7	3.5	1.1	11.5	36
10am	1.2	0.3	1.0	0.5	5.8	0.4	0.2	0.7	0.8	0.4	0.2	0.4	1.0	0.0	0.2	0.6	0.9	1.6	0.3	0.9	0.3	0.6	1.2	0.6	0.2	0.2	0.4	8.4	5.8	1.9	19.1	56
11am	1.4	0.4	1.3	0.7	6.3	0.5	0.3	0.9	1.1	0.4	0.3	0.4	1.4	0.1	0.2	0.7	1.1	2.3	0.4	1.2	0.4	0.7	1.5	0.8	0.3	0.4	0.5	10.9	7.8	2.8	25.6	73
12pm	1.7	0.5	1.7	0.8	12.2	0.5	0.7	1.1	1.2	0.6	0.5	0.6	1.8	0.2	0.4	1.0	1.4	3.0	0.5	1.6	0.8	0.9	1.8	1.2	0.4	0.7	0.6	13.1	9.6	3.3	38.0	102
1pm	1.8	0.5	1.7	0.8	15.7	0.6	0.9	1.2	1.2	0.6	0.5	0.7	1.7	0.3	0.5	1.1	1.5	3.4	0.5	1.9	1.1	1.2	2.0	1.5	0.4	0.9	0.6	13.8	10.3	3.4	44.7	117
2pm	1.7	0.5	1.5	0.9	12.4	0.6	0.7	1.3	1.3	0.7	0.5	0.7	1.5	0.3	0.4	0.9	1.5	3.1	0.5	1.7	1.0	1.3	1.9	1.3	0.4	0.7	0.7	13.4	10.8	3.7	41.3	109
3pm	1.6	0.5	1.4	0.9	9.7	0.6	0.5	1.3	1.5	0.7	0.5	0.7	1.3	0.3	0.3	0.9	1.5	2.8	0.5	1.5	0.9	1.3	1.9	1.0	0.4	0.7	0.7	13.2	12.1	4.1	38.9	104
4pm	1.6	0.5	1.4	1.0	9.9	0.7	0.6	1.5	1.8	0.8	0.5	0.8	1.3	0.2	0.3	0.9	1.7	2.6	0.6	1.7	1.0	1.4	2.2	1.1	0.5	0.9	0.8	14.9	15.0	4.6	44.5	117
5pm	1.7	0.5	1.5	1.1	11.9	0.7	0.8	1.6	1.9	0.9	0.7	0.9	1.4	0.3	0.5	1.2	1.8	2.5	0.6	1.8	1.3	1.7	2.3	1.1	0.5	1.0	0.8	16.0	17.0	4.6	50.8	131
6pm	1.5	0.5	1.4	1.0	14.4	0.6	1.1	1.4	1.1	0.8	0.9	0.9	1.4	0.5	0.6	1.2	1.8	2.2	0.5	1.6	1.4	1.9	2.0	1.3	0.5	1.2	0.7	15.6	15.5	3.5	54.3	133
7pm	1.4	0.5	1.4	0.8	16.2	0.5	1.4	1.4	1.0	0.7	1.0	0.9	1.4	0.6	0.7	1.2	2.1	2.1	0.5	1.5	1.4	1.9	1.6	1.6	0.4	1.3	0.7	14.3	12.7	2.5	55.8	131
8pm	1.3	0.4	1.1	0.6	17.3	0.4	1.5	1.3	0.8	0.6	1.0	0.7	1.2	0.7	0.7	1.1	2.0	2.1	0.5	1.2	1.3	2.0	1.2	1.8	0.3	1.0	0.6	12.5	9.3	1.6	50.2	118
9pm	1.0	0.3	0.7	0.4	17.7	0.3	1.2	0.9	0.5	0.3	0.9	0.5	0.8	0.7	0.6	0.8	1.5	1.5	0.3	0.7	1.3	1.9	0.6	1.5	0.2	0.6	0.4	9.2	5.8	0.8	37.0	91
10pm	0.4	0.1	0.3	0.2	15.1	0.1	0.7	0.2	0.3	0.2	0.6	0.2	0.3	0.4	0.3	0.5	0.5	0.7	0.2	0.3	0.9	1.7	0.2	0.7	0.1	0.3	0.1	4.1	2.4	0.3	19.2	51
11pm	0.2	0.1	0.2	0.1	10.6	0.0	0.4	0.1	0.2	0.1	0.3	0.2	0.2	0.2	0.1	0.2	0.2	0.3	0.3	0.2	0.4	1.2	0.1	0.4	0.0	0.1	0.0	2.0	1.0	0.2	9.4	29
12am	0.1	0.0	0.2	0.0	7.4	0.0	0.2	0.0	0.2	0.1	0.1	0.2	0.2	0.1	0.0	0.1	0.1	0.2	0.3	0.1	0.1	0.9	0.1	0.2	0.0	0.1	0.0	0.9	0.5	0.1	5.3	18
1am	0.0	0.0	0.2	0.0	6.0	0.0	0.1	0.0	0.2	0.1	0.0	0.1	0.1	0.0	0.0	0.0	0.1	0.2	0.3	0.1	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.5	0.2	0.0	2.8	12
2am	0.0	0.0	0.1	0.0	4.3	0.0	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.1	0.2	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.0	1.2	7
3am	0.0	0.0	0.0	0.0	2.5	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	3.3
4am	0.0	0.0	0.0	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	1.6
5am	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	1.0
Total	20	6	18	10	207	7	12	16	16	9	9	10	18	5	6	14	21	32	8	19	14	22	22	17	5	10	8	172	142	39	559	1,473

Table A2.2: Total Auckland Alcohol Sales per Hour by Outlet Type ($m)

Hour Beginning	Liquor Retailing	Supermarket and Grocery Store	Cafes and Restaurants	Pubs, Taverns and Bars	Sports Clubs	Accommodation	Catering Services	Other On/Club-Licence	Other Off-Licence	Total
6am	$ 0.1	$ 0.8	$ 0.5	$ 0.4	$ -	$ 0.1	$ 0.1	$ 0.0	$ 0.0	$ 2.1
7am	$ 0.6	$ 3.5	$ 2.4	$ 0.4	$ -	$ 0.8	$ 0.6	$ 0.1	$ 0.1	$ 8.5
8am	$ 1.7	$ 8.2	$ 4.7	$ 0.5	$ -	$ 1.5	$ 1.2	$ 0.2	$ 0.2	$ 18.3
9am	$ 7.1	$ 16.4	$ 6.6	$ 1.1	$ 0.1	$ 1.9	$ 1.9	$ 0.5	$ 0.5	$ 36.0
10am	$ 16.0	$ 23.2	$ 8.7	$ 1.7	$ 0.4	$ 2.4	$ 2.5	$ 0.7	$ 0.7	$ 56.2
11am	$ 22.0	$ 28.5	$ 10.5	$ 2.3	$ 1.7	$ 2.8	$ 3.1	$ 1.2	$ 0.8	$ 72.8
12pm	$ 26.0	$ 30.3	$ 19.4	$ 6.3	$ 6.6	$ 5.7	$ 5.4	$ 2.8	$ 1.2	$ 103.6
1pm	$ 29.5	$ 28.8	$ 21.8	$ 10.7	$ 9.4	$ 6.6	$ 5.8	$ 3.8	$ 1.3	$ 117.7
2pm	$ 34.6	$ 29.9	$ 15.1	$ 9.2	$ 7.8	$ 4.5	$ 4.0	$ 3.1	$ 1.0	$ 109.2
3pm	$ 42.8	$ 31.5	$ 8.4	$ 7.1	$ 7.9	$ 2.5	$ 2.2	$ 2.6	$ 0.8	$ 105.8
4pm	$ 54.5	$ 34.5	$ 5.9	$ 8.5	$ 8.5	$ 1.8	$ 1.6	$ 2.7	$ 0.7	$ 118.7
5pm	$ 58.2	$ 34.1	$ 8.3	$ 12.0	$ 11.1	$ 2.3	$ 2.4	$ 3.6	$ 0.8	$ 132.7
6pm	$ 50.0	$ 24.3	$ 16.0	$ 15.8	$ 12.9	$ 4.1	$ 4.7	$ 4.5	$ 0.9	$ 133.4
7pm	$ 37.8	$ 15.0	$ 24.8	$ 18.3	$ 15.5	$ 6.3	$ 7.3	$ 5.6	$ 1.1	$ 131.6
8pm	$ 27.0	$ 10.2	$ 27.2	$ 18.0	$ 14.8	$ 7.1	$ 7.8	$ 5.4	$ 1.0	$ 118.6
9pm	$ 17.7	$ 5.9	$ 21.8	$ 16.2	$ 12.3	$ 6.4	$ 5.7	$ 4.4	$ 0.8	$ 91.1
10pm	$ 8.7	$ 1.1	$ 11.0	$ 13.1	$ 8.5	$ 3.9	$ 2.3	$ 2.8	$ 0.3	$ 51.6
11pm	$ 3.2	$ 0.4	$ 4.2	$ 10.7	$ 5.3	$ 1.8	$ 0.7	$ 1.8	$ 0.1	$ 28.2
12am	$ 0.3	$ 0.2	$ 1.9	$ 9.1	$ 2.5	$ 0.9	$ 0.3	$ 1.1	$ 0.0	$ 16.2
1am	$ 0.0	$ 0.1	$ 1.0	$ 6.9	$ -	$ 0.5	$ 0.1	$ 0.5	$ 0.0	$ 9.2
2am	$ 0.0	$ 0.1	$ 0.6	$ 4.4	$ -	$ 0.3	$ 0.1	$ 0.3	$ 0.0	$ 5.8
3am	$ 0.0	$ 0.1	$ 0.2	$ 2.3	$ -	$ 0.1	$ 0.0	$ 0.1	$ 0.0	$ 2.9
4am	$ 0.0	$ 0.1	$ 0.1	$ 1.2	$ -	$ 0.0	$ 0.0	$ 0.1	$ 0.0	$ 1.5
5am	$ 0.0	$ 0.2	$ 0.1	$ 0.6	$ -	$ 0.0	$ 0.0	$ 0.0	$ 0.0	$ 0.9
Total	$ 437.9	$ 327.2	$ 221.0	$ 176.9	$ 125.3	$ 64.3	$ 59.7	$ 47.9	$ 12.4	$ 1,472.6

Appendix 3: Sales by Centre and Outlet Detail

Table A3.1: Total Auckland Alcohol Sales by Centre and Outlet Type ($m)

	Off Licences					On and Club Licences						
	Liquor Retailing	Supermarket and Grocery Store	Catering Services	Other Off-Licence	Off Licences Sub-Total	Cafes and Restaurants	Pubs, Taverns and Bars	Sports Club	Accommodation	Other On/Club-Licence	On/Club Licences Sub-Total	Total
Albany	$ 0.4	$ 13.3	$ -	$ -	$ 13.6	$ 3.3	$ 2.0	$ 0.7	$ 0.1	$ 0.3	$ 6.3	$ 19.9
Birkenhead	$ -	$ 2.7	$ 0.0	$ 0.1	$ 2.8	$ 2.0	$ 0.5	$ 0.7	$ 0.0	$ -	$ 3.2	$ 6.1
Botany	$ 1.9	$ 9.3	$ -	$ 0.1	$ 11.2	$ 3.1	$ 3.4	$ -	$ 0.0	$ 0.3	$ 6.8	$ 18.0
Browns Bay	$ 1.2	$ 4.9	$ -	$ 0.1	$ 6.2	$ 1.4	$ 1.0	$ 0.7	$ 0.0	$ 1.0	$ 4.0	$ 10.3
CBD	$ 29.3	$ 20.0	$ 0.3	$ 1.2	$ 50.8	$ 46.5	$ 68.7	$ 2.5	$ 34.1	$ 4.9	$ 156.6	$ 207.4
Devonport	$ 1.6	$ 2.9	$ -	$ -	$ 4.5	$ 1.5	$ 0.3	$ 0.4	$ 0.2	$ 0.0	$ 2.3	$ 6.8
Eden Terrace	$ 3.6	$ 0.5	$ 1.2	$ -	$ 5.3	$ 2.1	$ 3.8	$ 0.7	$ 0.0	$ 0.1	$ 6.7	$ 12.0
Henderson	$ 5.2	$ 6.1	$ 0.1	$ -	$ 11.4	$ 2.2	$ 0.5	$ 0.4	$ -	$ 1.2	$ 4.3	$ 15.7
Highland Park	$ 5.9	$ 6.7	$ -	$ -	$ 12.6	$ 1.9	$ 1.2	$ 0.4	$ -	$ 0.3	$ 3.7	$ 16.3
Hunters Corner	$ 3.9	$ 2.0	$ -	$ -	$ 5.9	$ 0.7	$ 0.9	$ 0.7	$ 0.0	$ 0.4	$ 2.7	$ 8.6
Kingsland	$ 1.6	$ 0.9	$ 0.6	$ -	$ 3.0	$ 1.7	$ 3.0	$ 1.1	$ 0.0	$ 0.1	$ 5.8	$ 8.9
Lincoln Road	$ 5.3	$ 0.2	$ -	$ -	$ 5.5	$ 1.6	$ 1.2	$ 1.1	$ 0.4	$ -	$ 4.2	$ 9.7
Manukau Central	$ 1.2	$ 9.2	$ 0.0	$ 0.0	$ 10.5	$ 4.7	$ 2.2	$ 0.4	$ 0.3	$ 0.3	$ 7.8	$ 18.2
Mission Bay	$ -	$ 0.1	$ -	$ -	$ 0.1	$ 2.3	$ 2.1	$ 0.4	$ -	$ 0.3	$ 5.0	$ 5.1
Mt Eden Village	$ 2.5	$ 0.3	$ 0.4	$ -	$ 3.3	$ 2.2	$ 0.3	$ 0.4	$ 0.0	$ -	$ 2.9	$ 6.2
Mt Wellington/Sylvia Park	$ 0.7	$ 8.8	$ -	$ -	$ 9.5	$ 2.3	$ 1.9	$ -	$ -	$ 0.3	$ 4.5	$ 13.9
New Lynn	$ 4.4	$ 7.7	$ 0.1	$ -	$ 12.2	$ 3.3	$ 1.7	$ 2.8	$ 0.0	$ 0.9	$ 8.7	$ 20.9
Newmarket	$ 16.5	$ 3.6	$ 0.1	$ 0.3	$ 20.5	$ 7.5	$ 2.4	$ 0.7	$ 0.7	$ 0.6	$ 11.9	$ 32.4
Onehunga	$ 1.6	$ 1.8	$ 0.2	$ -	$ 3.5	$ 1.0	$ 1.0	$ -	$ 0.0	$ 2.0	$ 4.0	$ 7.5
Papakura	$ 4.8	$ 7.3	$ -	$ 0.0	$ 12.1	$ 1.3	$ 2.2	$ 1.8	$ 0.0	$ 1.2	$ 6.6	$ 18.7
Parnell	$ 6.8	$ 0.2	$ 0.1	$ -	$ 7.2	$ 2.8	$ 3.3	$ -	$ 0.2	$ 0.5	$ 6.8	$ 13.9
Ponsonby	$ 8.5	$ 0.7	$ 0.2	$ 0.1	$ 9.3	$ 6.0	$ 6.0	$ 0.4	$ 0.2	$ -	$ 12.7	$ 22.0
Pukekohe	$ 7.8	$ 8.5	$ -	$ -	$ 16.2	$ 2.4	$ 1.8	$ 0.4	$ 0.0	$ 1.2	$ 5.7	$ 21.9
Takapuna	$ 5.9	$ 0.2	$ 0.0	$ 0.1	$ 6.1	$ 4.3	$ 3.5	$ 0.7	$ 1.4	$ 0.8	$ 10.6	$ 16.7
Titirangi	$ 2.2	$ 0.8	$ 0.1	$ -	$ 3.0	$ 0.9	$ -	$ -	$ 0.0	$ 0.7	$ 1.7	$ 4.7
Wairau Park	$ 3.7	$ 0.4	$ 0.5	$ 0.2	$ 4.8	$ 2.2	$ 1.8	$ 1.1	$ 0.1	$ 0.3	$ 5.4	$ 10.2
Westgate	$ 3.2	$ 3.2	$ -	$ -	$ 6.4	$ 1.0	$ 0.3	$ 0.4	$ -	$ -	$ 1.6	$ 7.9
Individual Centres	$ 129.6	$ 121.9	$ 3.9	$ 2.1	$ 257.5	$ 112.4	$ 116.9	$ 18.2	$ 37.9	$ 17.2	$ 302.6	$ 560.0
Bunch 28	$ 43.9	$ 70.2	$ 7.8	$ 0.3	$ 122.2	$ 21.1	$ 15.1	$ 4.6	$ 4.3	$ 5.1	$ 50.1	$ 172.3
Bunch 29	$ 51.6	$ 56.7	$ 2.5	$ 0.3	$ 111.1	$ 15.0	$ 6.1	$ 3.9	$ 0.2	$ 5.8	$ 31.0	$ 142.1
Bunch 30	$ 14.7	$ 11.6	$ 0.2	$ 0.5	$ 26.9	$ 2.8	$ 2.2	$ 3.9	$ 0.7	$ 2.8	$ 12.4	$ 39.3
Outside Centre	$ 198.1	$ 66.8	$ 45.4	$ 9.2	$ 319.6	$ 69.6	$ 36.6	$ 94.9	$ 21.2	$ 17.1	$ 239.3	$ 558.9
Grouped and Outside Centres	$ 308.3	$ 205.3	$ 55.9	$ 10.3	$ 579.7	$ 108.7	$ 60.0	$ 107.1	$ 26.4	$ 30.7	$ 332.9	$ 912.5
Total	$ 437.9	$ 327.2	$ 59.7	$ 12.4	$ 837.1	$ 221.0	$ 176.9	$ 125.3	$ 64.3	$ 47.9	$ 635.4	$ 1,472.6

N.B.: cells are formatted so that the largest value for an individual centre in each column is the longest bar, with all other bars proportional

m.e spatial

Table A3.2: Share of Auckland Alcohol Sales by Centre and Outlet Type

	Off Licences					On and Club Licences						
	Liquor Retailing	Supermarket and Grocery Store	Catering Services	Other Off-Licence	Off Licences Sub-Total	Cafes and Restaurants	Pubs, Taverns and Bars	Sports Club	Accommodation	Other On/Club-Licence	On/Club Licences Sub-Total	Total
Albany	0%	1%	0%	0%	1%	0%	0%	0%	0%	0%	0%	1%
Birkenhead	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Botany	0%	1%	0%	0%	1%	0%	0%	0%	0%	0%	0%	1%
Browns Bay	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%
CBD	2%	1%	0%	0%	3%	3%	5%	0%	2%	0%	11%	14%
Devonport	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Eden Terrace	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%
Henderson	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	1%
Highland Park	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	1%
Hunters Corner	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%
Kingsland	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%
Lincoln Road	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%
Manukau Central	0%	1%	0%	0%	1%	0%	0%	0%	0%	0%	1%	1%
Mission Bay	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Mt Eden Village	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Mt Wellington/Sylvia Park	0%	1%	0%	0%	1%	0%	0%	0%	0%	0%	0%	1%
New Lynn	0%	1%	0%	0%	1%	0%	0%	0%	0%	0%	1%	1%
Newmarket	1%	0%	0%	0%	1%	1%	0%	0%	0%	0%	1%	2%
Onehunga	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%
Papakura	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	1%
Parnell	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%
Ponsonby	1%	0%	0%	0%	1%	0%	0%	0%	0%	0%	1%	1%
Pukekohe	1%	1%	0%	0%	1%	0%	0%	0%	0%	0%	0%	1%
Takapuna	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	1%
Titirangi	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Wairau Park	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%
Westgate	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%
Individual Centres	9%	8%	0%	0%	17%	8%	8%	1%	3%	1%	21%	38%
Bunch 28	3%	5%	1%	0%	8%	1%	1%	0%	0%	0%	3%	12%
Bunch 29	4%	4%	0%	0%	8%	1%	0%	0%	0%	0%	2%	10%
Bunch 30	1%	1%	0%	0%	2%	0%	0%	0%	0%	0%	1%	3%
Outside Centre	13%	5%	3%	1%	22%	5%	2%	6%	1%	1%	16%	38%
Grouped and Outside Centres	21%	14%	4%	1%	39%	7%	4%	7%	2%	2%	23%	62%
Total	30%	22%	4%	1%	57%	15%	12%	9%	4%	3%	43%	100%

N.B.: cells are formatted so that the largest value for an individual centre in each column is the longest bar, with all other bars proportional

me spatial