2017 COMMERCIAL CENTRE FACTSHEET

Belfast / Northwood

KAC
KEY ACTIVITY CENTRE

CENTRE TYPE: CENTRAL CITY
DISTRICT CENTRE
NEIGHBOURHOOD CENTRE
LARGE FORMAT CENTRE

Accompanying sheet contains guide and notes

Centre Overview

Belfast emerged as a new commercial centre in the 2000s in response to the northward growth of the city. The centre's development commenced with the Large Format SupaCentre (which has since been added to incrementally), and a supermarket adjacent the Northwood subdivision.

As part of the Belfast Area Plan (and subsequent plan changes associated with that urban growth), additional greenfield land south of Radcliffe Road was rezoned with the intention of creating a new Key Activity Centre (KAC) to serve the wider Belfast area. This includes large areas of new residential land to the east. When developed the centre will provide up to 20,000m^2 of retail floor space, as well as other commercial and community facilities. Enhancement of the Styx river is likewise envisioned in future development.

This factsheet reflects the performance of the SupaCentre / New World which currently have the characteristics of a Large Format Retail Centre.

Current Performance

The centre catchment is heavily focused on northern suburbs, but also draws trade from communities north of the Waimakariri River. Since 2009, spending in the centre has been maintained relative to the average of other District Centres and there have been general improvements across the range of wellbeing measures as it has matured.

Physical amenity of the centre is reflective of the large format status. Landscaping softens the built form, but the area is still dominated by large scale buildings and car parking—albeit well maintained and in good condition. The modern New World supermarket is an appealing local store, convenient to residents in the adjacent subdivision.

The social amenities offered by this centre are, so far, undeveloped. Residential subdivision has driven development of hospitality and indoor recreation uses and nearby public open space is fairly generous with the promise of further enhancement along the River Styx to come. However, public services are not present and health and community services are currently under represented compared to other centres. As the district centre development begins this would be anticipated to improve.

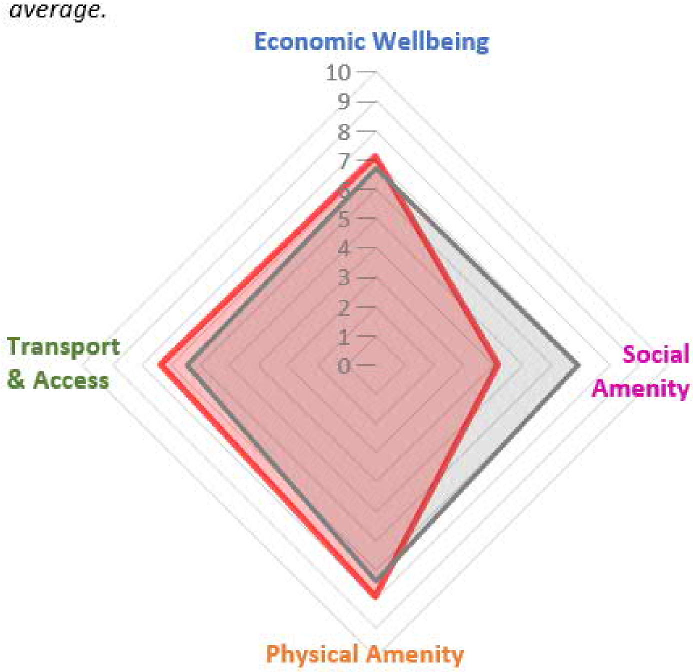
Vehicle access to the centre is good and current parking provision is generous. A local public transport route (107 service) links surrounding suburbs to the centre, which itself is served by the high frequency Blue Line core route. Despite on-road cycle lanes and signalised crossings, the experience for cyclists and pedestrians is compromised by high traffic volumes on Main North Road. Creative transport solutions will be needed when the new commercial area is developed.

In summary, Belfast's District Centre remains a work in progress, being dependent upon surrounding future residential development to trigger a more typical mix of retailing, services and activity. Currently absent public services can be expected with the development of the land south of Radcliffe Road. As a retail park, the SupaCentre is performing well with good anchor tenants and a wider range of other uses compared with other Large Format Centres. Improving access by different modes of travel (including the provision of a bus interchange) will be a key shaper (an planning condition) of future land development in the centre.

COMPARISON WITH OTHER CENTRES

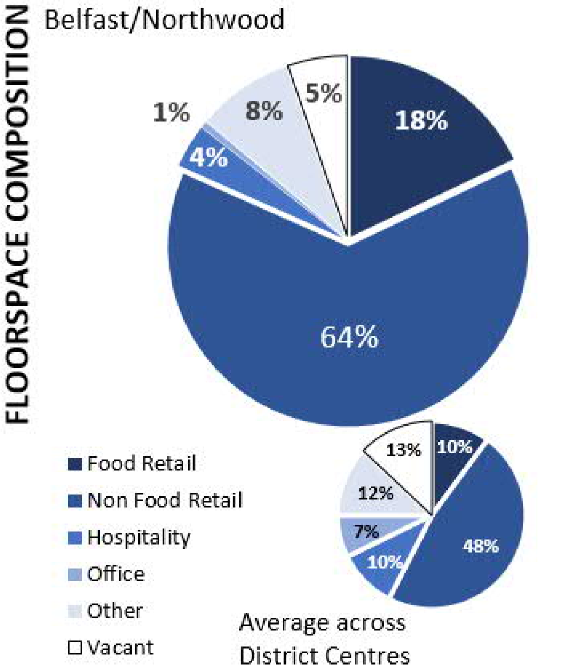
*This diagram shows the subject area scores for this centre (**red diamond**) and the average score across all district centres (**black diamond**).*

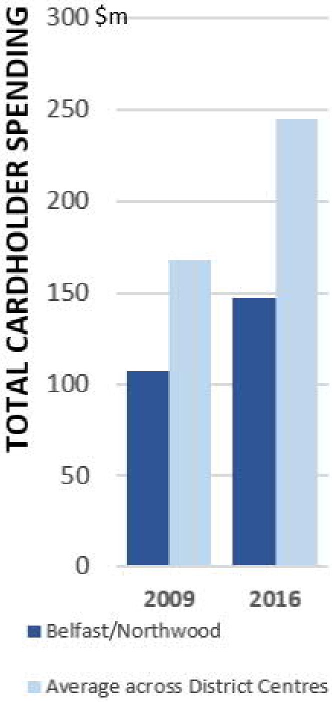
For each subject area, where the red diamond is wider than the black diamond, this centre is performing above the average.

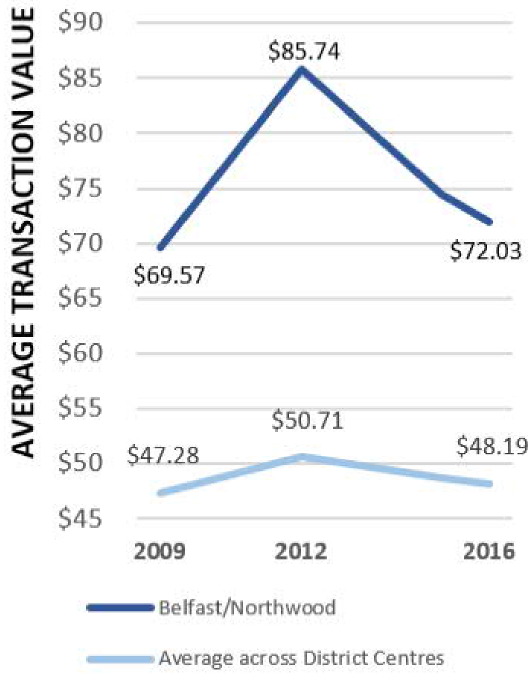


STRENGTHS	WEAKNESSES
• Good anchor tenants and fair range of other retail on offer. • Residential growth and further land zoned for housing	• Will remain a peripheral centre with poor access for pedestrians and cyclists until surrounding housing is developed. • Limited social amenity—esp. public/community services
OPPORTUNITIES	**THREATS**
• Zoned land earmarked to provide a sizeable new centre. • Reduced Main North Road traffic volume provides scope to make substantial access improvements to the centre.	• New motorway may divert a share of passing traffic away. • Growth/reinvestment at Papanui/Northlands.

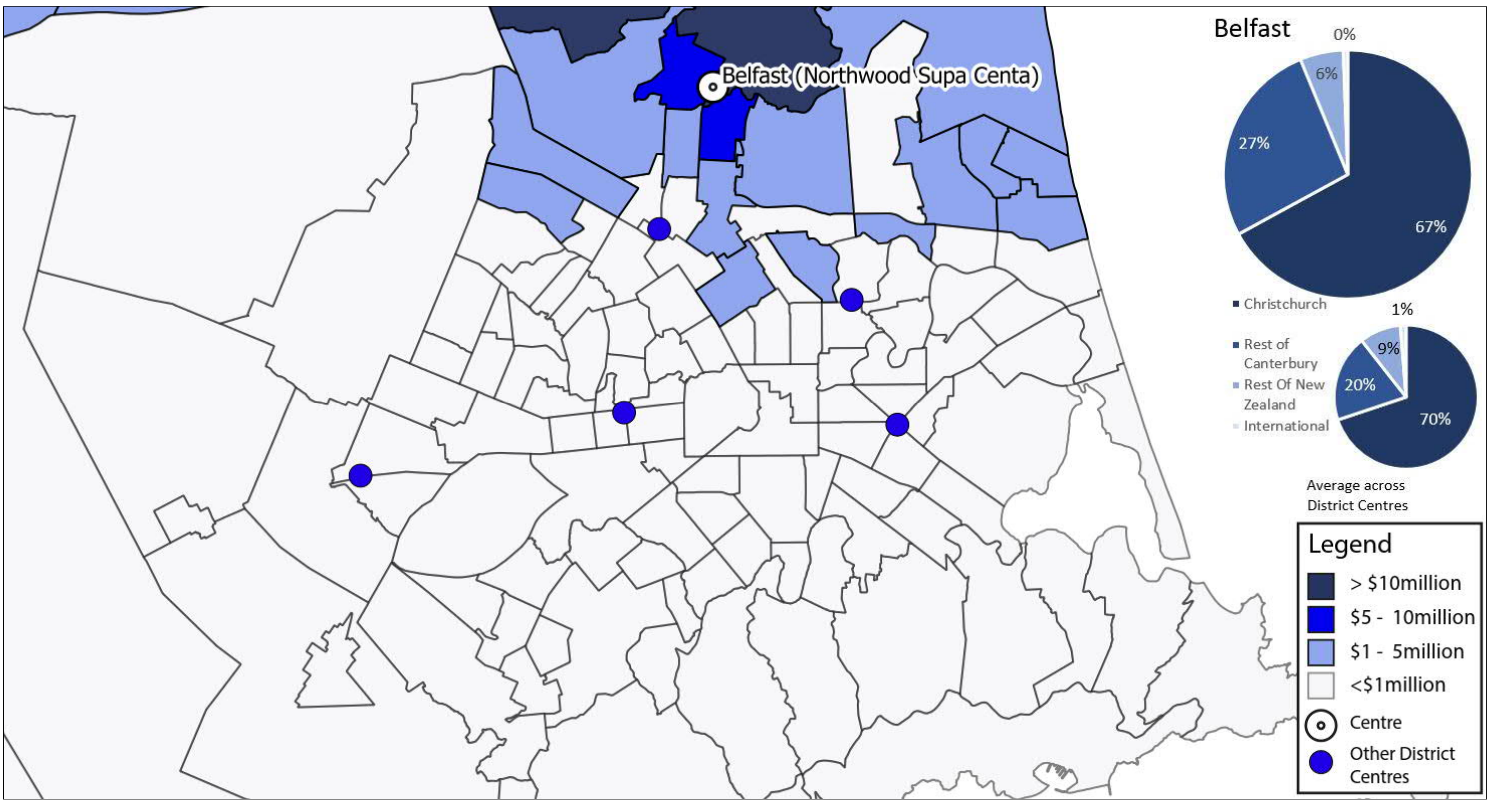
ECONOMIC WELLBEING

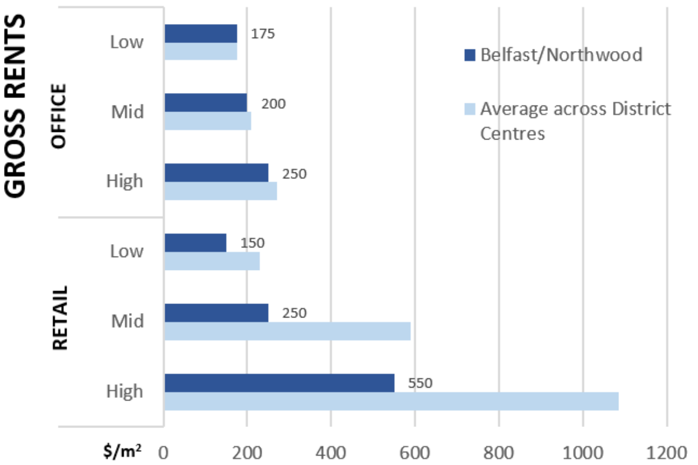


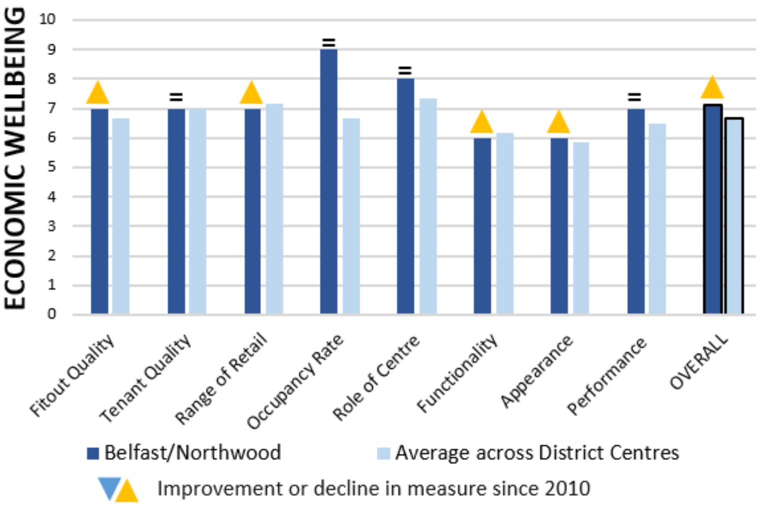




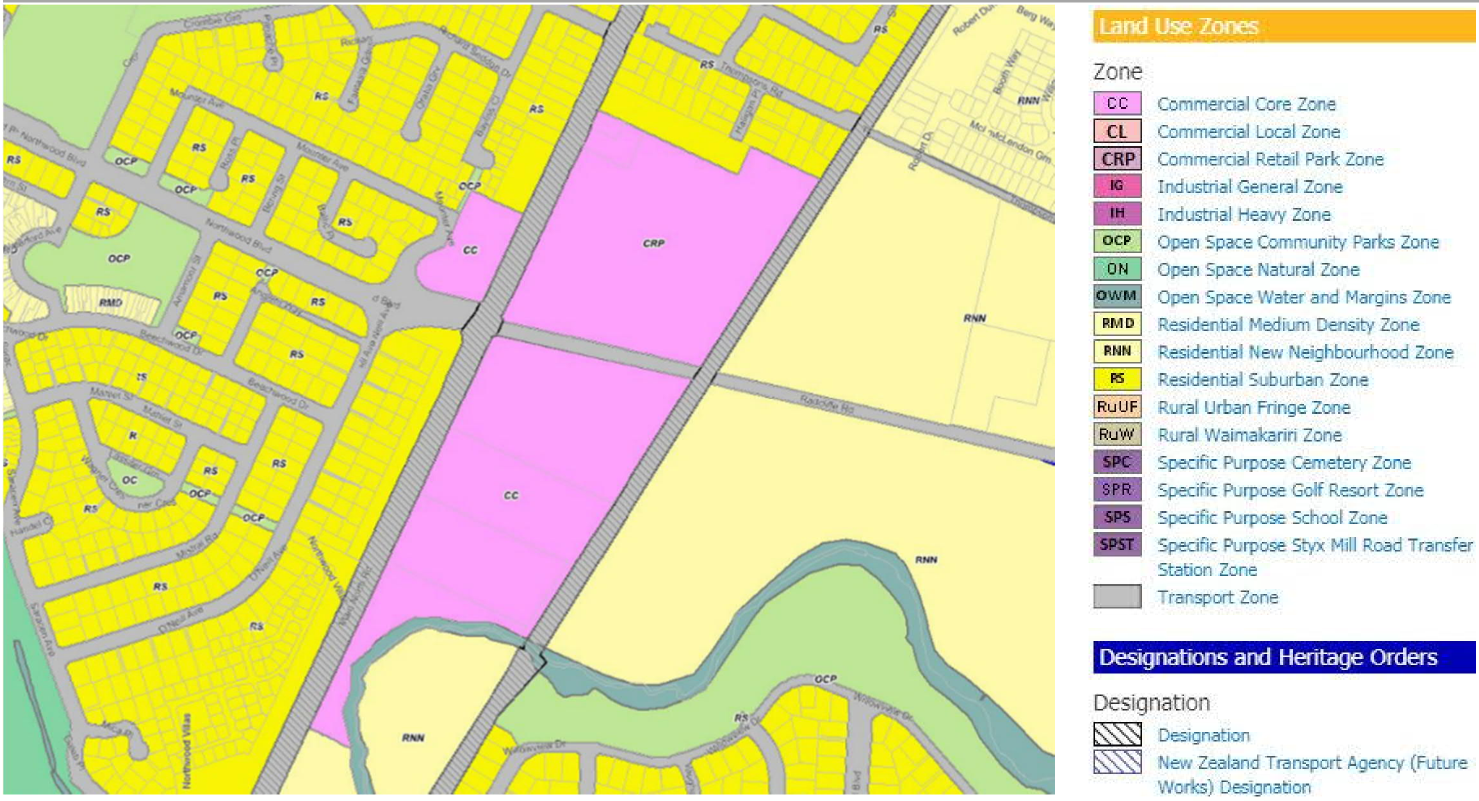
SPENDING SOURCE DISTRIBUTION MAP







LAND USE AND ZONING

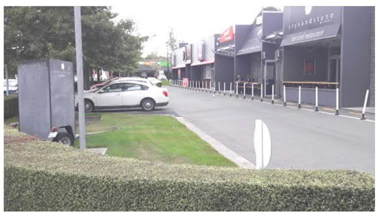


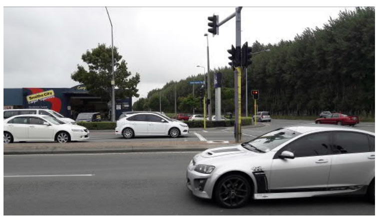
CENTRE STATISTICS	Belfast (Northwood Supa Centa)				District Centres Average
m² unless otherwise stated	2004	2010	**2016**	*+/- 2010-16*	2016
Zoned Land Area	-	83,882	**180,302**	*+96,420*	171,066
Built Area	-	25,932	**31,917**	*+5,985*	68,092
Average Plot Ratio	-	0.31	**0.18**	*-0.13*	0.41
Retail Space	-	25,932	**28,133**	*+2,201*	48,392
Ground Floor Units	-	29	**31**	*+2*	83
Operative Businesses	-	-	**32**	-	159
Vacant Land	-	-	**92,796**	-	26,538
Vacant Floorspace	-	881	**1,840**	*+959*	8,640
Vacant Units (No.)	-	2	**2**	0	15.7
Street Frontage (m)					
Active	-	-	**1,190**	-	1,205
Vacant	-	-	**45**	-	150

Land use monitoring data, CCC

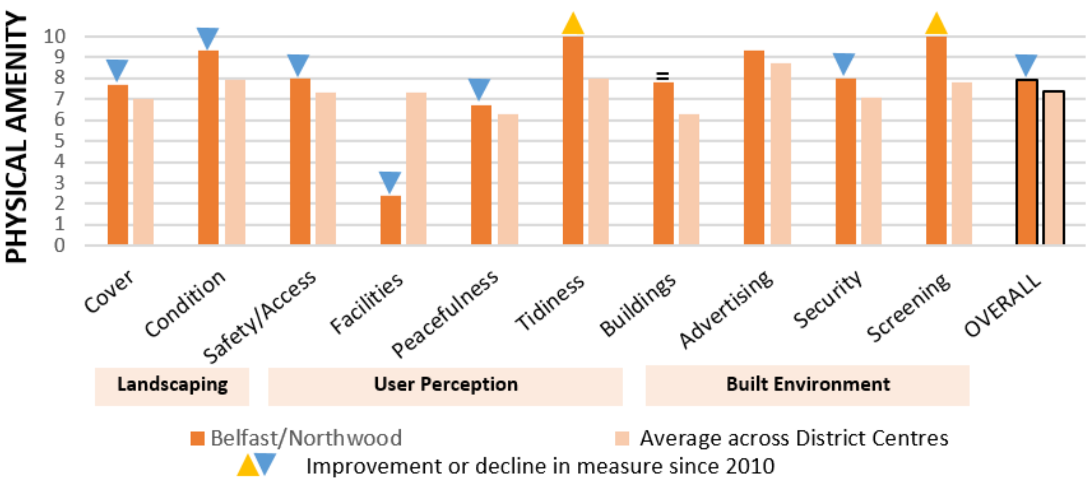
Business Count	42	72	**75**	*+3*	269
Employee Count	355	474	**648**	*+174*	2,102

Longitudinal Business Frame data, StatsNZ





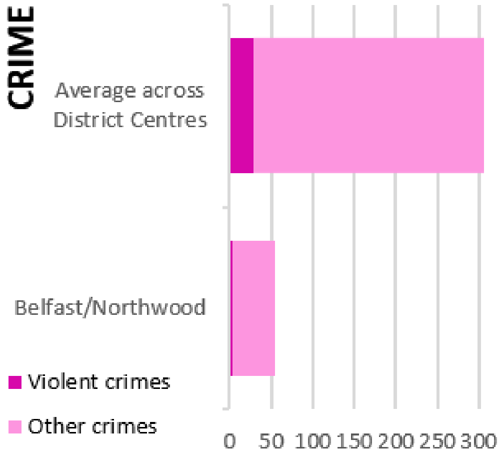
PHYSICAL AMENITY



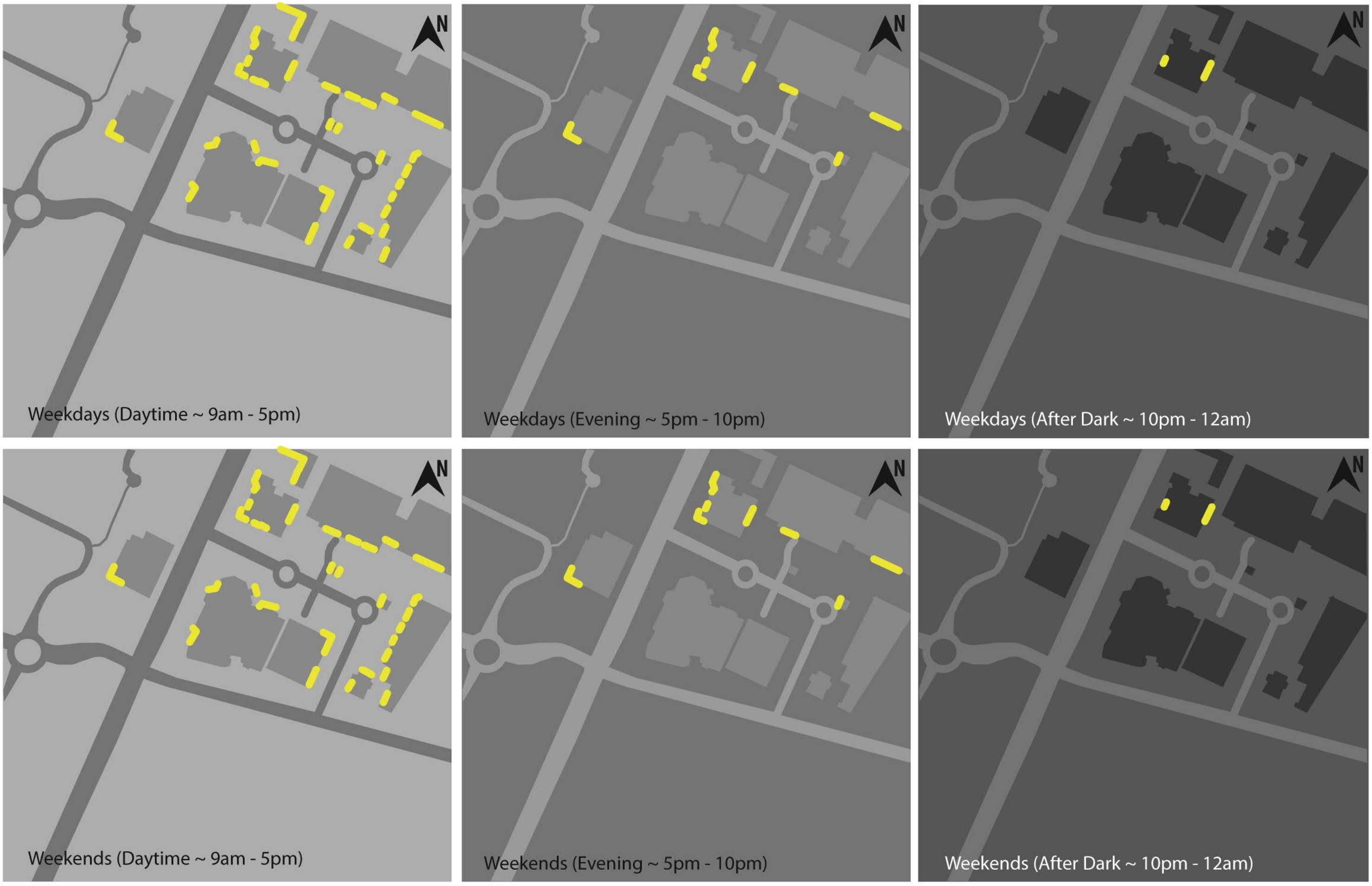
SOCIAL WELLBEING

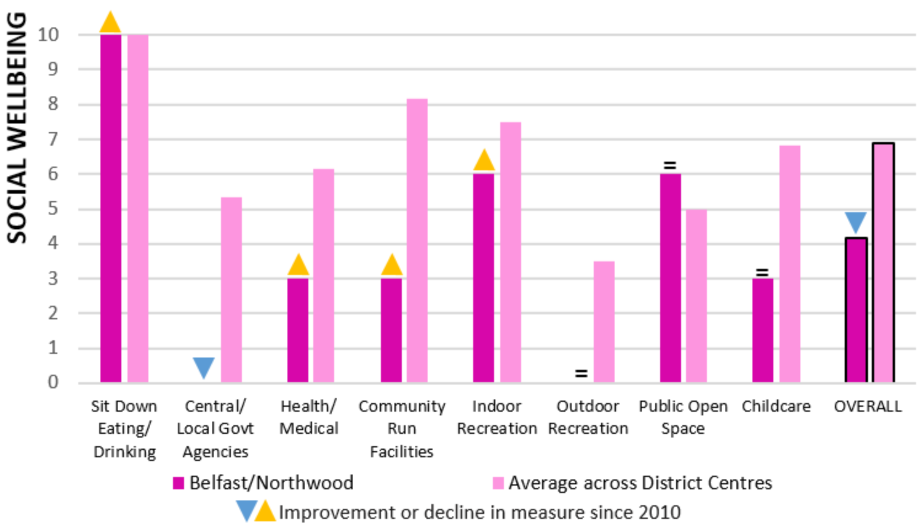
CATCHMENT STATISTICS
(Census, StatsNZ)

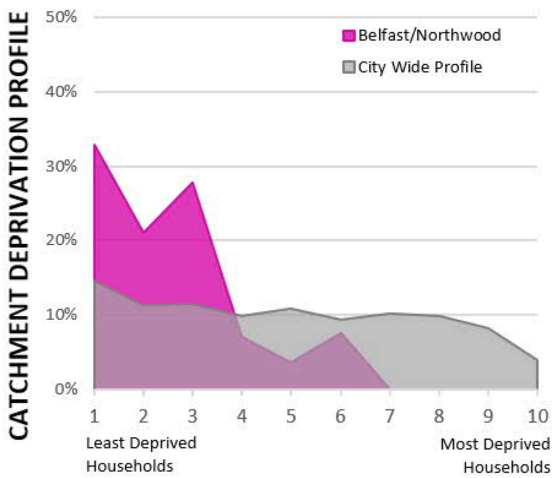
	Belfast			District Centres Average
	2006	**2013**	+/-	2013
Households within 400m of centre	600	**639**	*+39*	1094.5
Household Density (houses/hectare)	1.5	**1.6**	*+0.1*	9.4
Residents within 400m of Centre	1,545	**1,566**	*+21*	2,778
Residents under 15yrs	15.9%	**16.1%**	*+0.2%*	18.5%
Residents over 65yrs	17.7%	**25.1%**	*+7.4%*	23.8%
Average Car ownership per household	0.99	**1.014**	*+0.024*	1.2
Average Households with no car	3%	**3%**		10%
Average Household Income	$60,946	**$70,200**	*+$9,254*	$66,255
Residents on Social Welfare	6.0%	**5.9%**	*-0.1%*	13%



ACTIVE STREET FRONTAGES





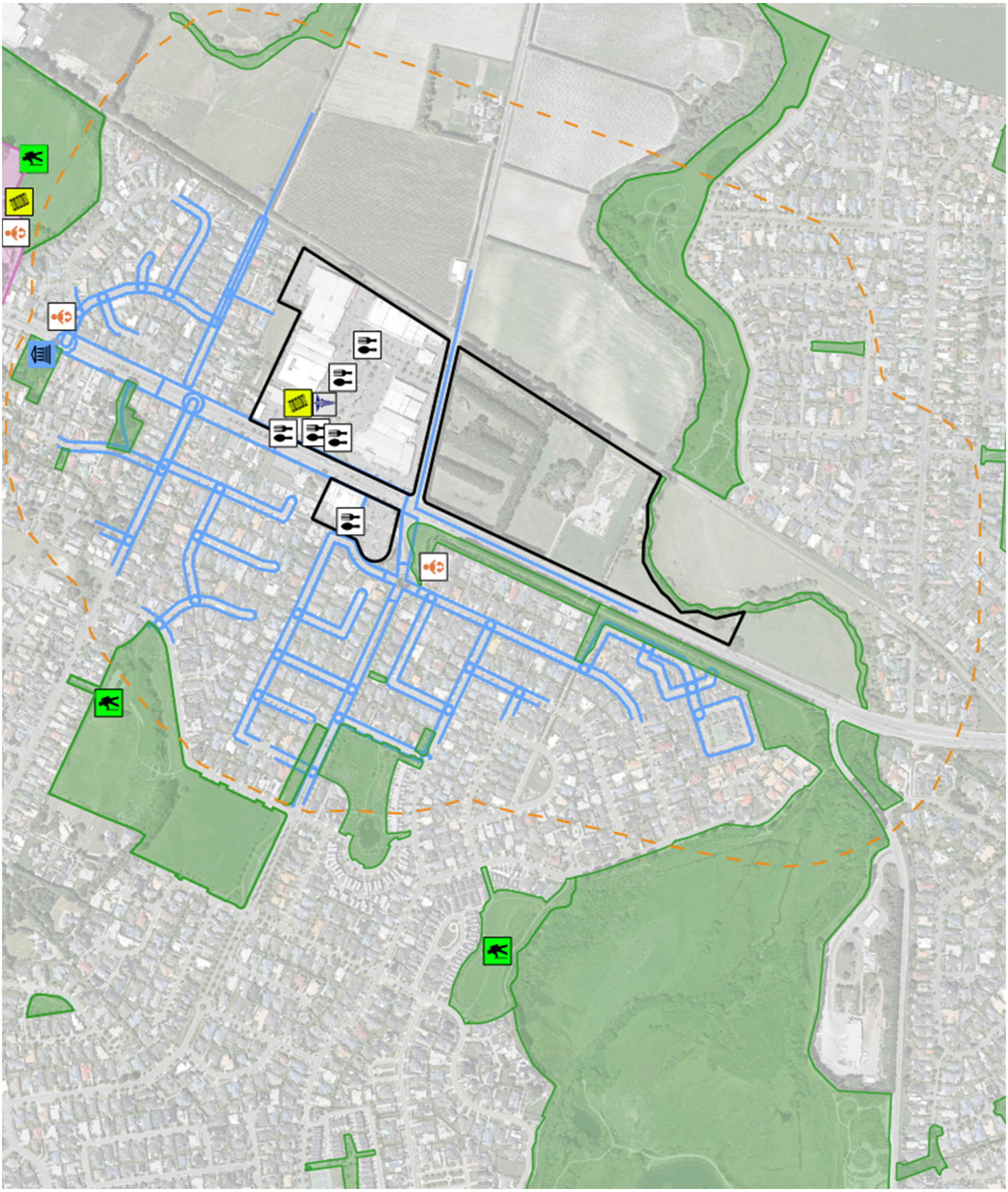


SOCIAL AND COMMUNITY FACILITIES WITHIN 400M

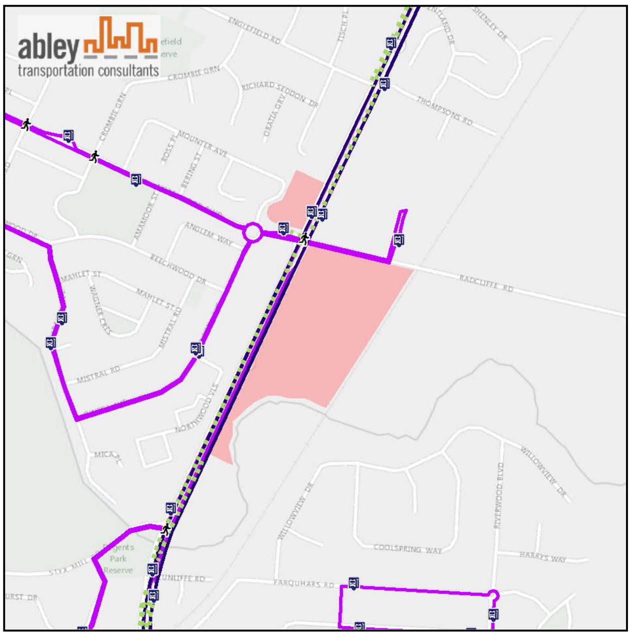
N

- Central/Local Government Services
- Health/Medical Facilities
- Community Owned/ Operated Facilities
- Cafes, Bars and Restaurants
- Indoor Recreation
- Active Recreation
- Childcare Centre
- Public Open Space
- Schools
- Commercial Centre Boundary
- 400m Buffer
- 400m Walking Network

0 100 200 m

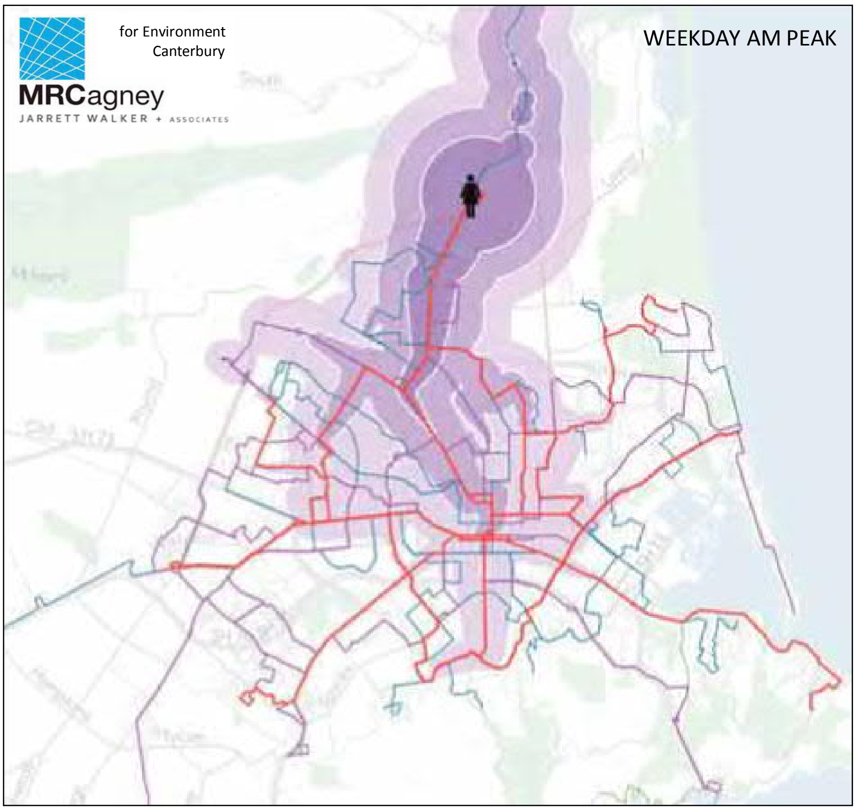


NETWORK ACCESSIBILITY



Pedestrian Crossing
Bus Stop
Cycle Route
Bus Route - *High Frequency*
- *Low Frequency*

PUBLIC TRANSPORT REACH



Route Frequency

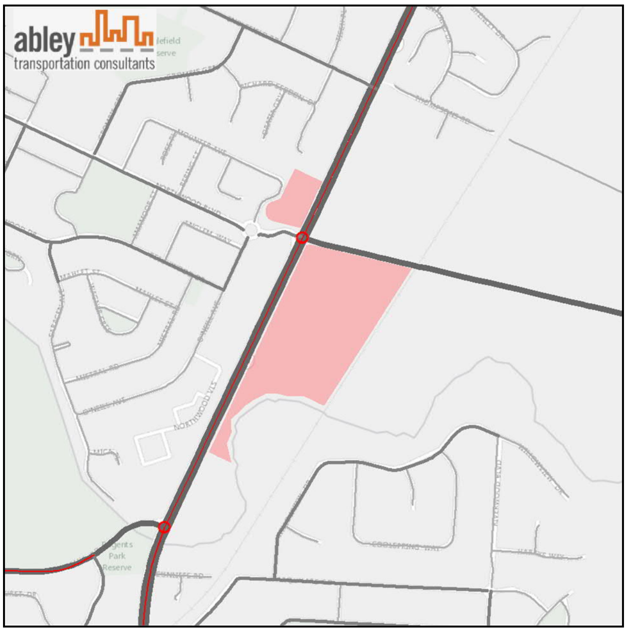
- Every 15 mins or better, plus 10 min peak
- 15 mins all day
- 30 mins midday, 15-20 mins peak
- 30 mins all day
- 60 mins midday, 30 mins peak

Travel Distance

Distance that can be travelled in,

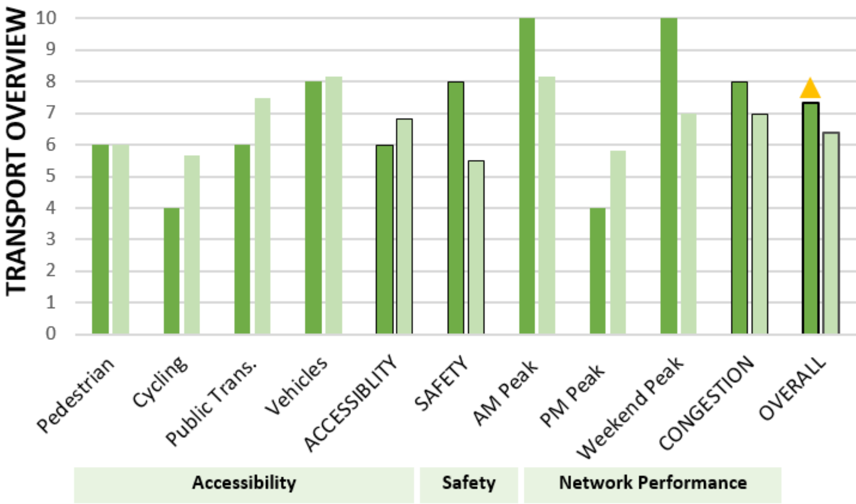
- 30 minutes
- 45 minutes
- 60 minutes

NETWORK SAFETY



Road Type
- Arterial
- Collector
- Local

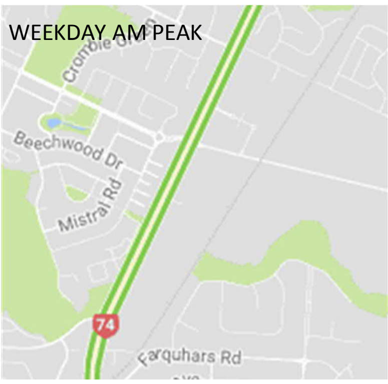
Road Safety (based on accident data)
- High Risk Corridor
- High Risk Intersection

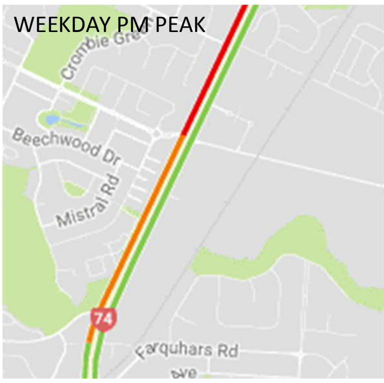


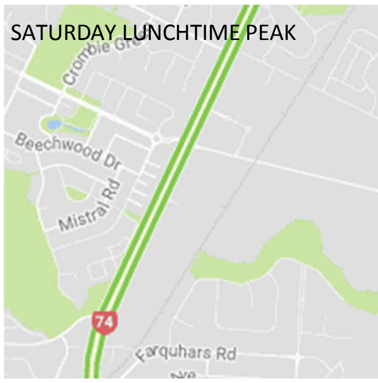
Belfast/Northwood   Average across District Centres

Overall Improvement or decline since 2010

NETWORK PERFORMANCE







CONGESTION

- None
- Light
- Medium
- Heavy
- Very Heavy

COMMERCIAL CENTRE FACTSHEETS: Information Guide

OVERVIEW

The Commercial Centres Factsheets are an objective appraisal of the district's larger centres, drawing on statistical data sources, specialist advice from consultants and surveys. Prepared previously in 2004 and 2010, they provide a regular snapshot of each centre's current state, relevant issues and longer term trends.

The centres considered in this review exercise — as mapped and listed on the back page — are grouped reflecting the roles and functions that are envisioned in the District Plan[1] as set out below.

- **District Centres** (6) - *Major retail destination for comparison and convenience shopping and a focal point for employment (including offices), community activities and community facilities (including libraries, meeting places), entertainment (including movie theatres, restaurants, bars), and guest accommodation. Medium density housing is contemplated in and around the centre. Anchored by large retailers including department store(s) and supermarket(s). Accessible by a range of transport, including multiple bus routes. Public transport facilities, including an interchange, may be incorporated.*
- **Neighbourhood Centres** (30) — *A destination for weekly and daily shopping needs as well as for community facilities. In some cases, Neighbourhood Centres offer a broader range of activities including comparison shopping, entertainment (cafes, restaurants and bars), residential activities, small scale offices and other commercial activities. Anchored principally by a supermarket(s) and in some cases, has a second or different anchor store. Serves the immediately surrounding suburbs and in some cases, residents and visitors from a wider area. Medium density housing is contemplated in and around the centre. Accessible by a range of transport, including one or more bus services.*
- **Large Format Retail Centres** (5, including three associated with District Centres) - *Standalone retail centre, comprising stores with large footprints, yard-based suppliers, trade suppliers including building improvement centres, and other vehicle oriented activities. Provision of other commercial activities and residential and community uses is limited. This includes limiting offices to an ancillary function, and at Tower Junction, providing for a limited amount of commercial services. Serves large geographical areas of the city. Not necessarily connected to a residential catchment. Primarily accessed by car with limited public transport services.*
- **Other Centres** (5) - these centres were included for specific interest. The three Banks Peninsula centres were included as their roles are particularly important given the dispersed settlement pattern. Woolston Tannery was included to understand how its very specialist offer might be understood alongside impacting on nearby centres. Spitfire Square at the International Airport was included given that its scale is equivalent to a medium sized neighbourhood centre yet serves a significant visitor and workforce based community rather than a residential catchment.

The factsheets focus on 4 colour coded themes as listed below. A consistent methodology has been used to collect core data within these themes. This allows for high level comparisons of performance between different centres, as well as charting change in performance over time. For example, the diagram on the front page of each factsheet indicates the performance of each centre across the four themes, compared to an average of centres of the same type.

ECONOMIC WELLBEING	Considers the type and scale of different commercial activities, levels of spending, occupancy, quality of the centre commercial offer/experience, the centre's overall function.
PHYSICAL AMENITY	Looks at aspects of the public environment grouped into measures of landscaping, user perceptions (such as safety, noise, tidiness, on-street facilities (*bins, benches, bikestands, etc.*) and the appearance of buildings (including prominence of advertising and servicing).
SOCIAL WELLBEING	Records the availability of different social and community facilities within a short walk of 400 metres of the centres and the population make-up within that immediate catchment area.
TRANSPORT AND ACCESS	Explores the accessibility of centres by different modes of travel, recognised safety issues on the local road network and levels of congestion at peak times.

The factsheets also include mapping of the land use zones and a range of core statistics charting change since 2004 in the amount of commercial space, levels of employment, business activity and vacancy rates.

Finally, the written commentaries draw together some of the key findings about each centre and concludes with a simple summary of its strengths, weaknesses, opportunities and threats. In essence, the factsheets are seeking to inform and encourage debate about the issues facing centres, in turn guiding better decision making about how change is managed.

[1] as set out in Objective 15.2.2 of the Christchurch District Plan

FACTSHEET FORMAT AND COMPONENT INFORMATION

The factsheets for each type of centre vary reflecting the availability of data. This guide aims to explain the key elements of the factsheets drawing on the Neighbourhood Centre factsheet layout. Similarly titled elements are present in the other factsheet types. Additional District centre elements are identified separately at the bottom of the opposite page.

1 Centre Name and Type

Centre name and its role as defined in section 15.2.2.1 of the District Plan. Other Centres (Rural and Specialist) and Key Activity Centres are annotated here.

2 Aerial Photo

Aerial photograph overlaid with Commercial Zone area, street names and other labelling. Scale varies according to centre size — minimum of 1:5000

3 Comparison Diagram

Composite representation of the centre's performance *(drawn from economic wellbeing, social and physical amenity, and transport scores contained in the factsheet)* compared to an average of scores for centres of the same type.

Large Format Centre Diagrams have 3 sides (no Social amenity evaluation). No diagram for Specialist Centres due small sample and different role/functions for each.

4 Commentary text

Centre description drawing on interpretation of information presented in the factsheet, site visit observations and comments from specialist consultants.

Summary table draws out strengths, weaknesses, opportunities and threats relevant to the centre.

5 Centre Statistics

Zoned Land	(2004)B2 Zoned Land only. Source: 2004 Factsheet. (2010) B1, B2 City Plan zones and some B2p, TC B4, L1, BRP zone (Banks Peninsula District Plan). Source: 2010 Factsheet. (2016) Commercial Core, Commercial Retail Park, Commercial Banks and Commercial Local zones. Source: District Plan.
Built Area	Square metres of commercial building floorspace derived from CCC District Valuation Roll – 2004, 2010, 2017 (CCC Monitoring & Research))
Average Plot Ratio	Calculated as the proportion of commercial floor area relative to the land area using 2010 and 2016 data. Built area excludes service, residential, and other use buildings
Retail Floorspace	Gross building area in retail use defined by ANZSIC classification; 2010 and 2016 data derived from CCC, District Valuation Roll. 2004 factsheet data uses net figure converted to gross using a standard +20% uplift.
Ground Floor Units	Number of ground floor units recorded in centres survey. 2010 data from Food and Beverage (10/404114) and Retail Survey (10/248762 & 10/360441)
Operative Businesses	Businesses operating in centre (Ground, first & mixed occupation). Survey April 2017. Note: Some upper floor uses were estimated.
Vacant Land	Previously occupied land now vacant due to demolition Survey and aerial photo analysis – June 2017.
Vacant Floorspace	Vacant floor space as surveyed (2009) and derived data utilising valuations hub information, Property Economics retail audit, and building consent information (2017). No data for 2004.
Vacant Units	Vacant Ground floor units. Source: 2004, Factsheet, 2009/2016 Surveys.
Street Frontage - Active and Vacant	Length of active and vacant ground floor recorded in Ground Floor Activity survey— CCC Monitoring and Research Team (Dec 2016/April 2017)
Business Count Employee Count	Statistics New Zealand, Longitudinal Business Frame Update 2016 Extract by CCC Monitoring and Research Team. Note that mesh blocks include other zones with, for example, home based businesses and employment that is unrelated to the centre function .

ECONOMIC WELLBEING

6 Floorspace Composition

Floorspace use classified using Australian and New Zealand Standard Industrial Classification (ANZSIC) categories. "Other' category typically includes industrial and auto uses incl. Petrol stations. 'Vacant' only includes vacant buildings (not land). *Property Economics, Retail Audit Data (for CCC, April 2017)*

7 Total Cardholder Spending

Value of EFTPOS/Credit Card transactions within the centre meshblock areas centre for specified year. *Marketview, Retail Centre Spending (for CCC, April 2017)*

8 Average Transaction Value

Value of EFTPOS/Credit Card transactions divided by the number of transactions within the centre meshblock areas centre for specified year. *Marketview, Retail Centre Spending (for CCC, April 2017)*

9 Gross Rents

Average, upper and lower quartile rents for office and retail space in the centre in\$ per m^2 compared to averages of the centre type. *CBRE, Retail and Office Rental report (for CCC, June 2017).*

10 Economic Wellbeing

Categorised scoring across eight economic qualities of the centre using a consistent methodology used in 2004/2010. Overall score is used in the Comparison Diagram (see 3). *Property Economics, Christchurch Retail Centre Economic Wellbeing Assessment (for CCC, July 2017)*

PHYSICAL AMENITY

11 Physical Amenity

Categorised scoring across ten amenity qualities of the centre grouped to landscaping, user perception and built environment. Consistent methodology used in 2004/2010. On street advertising added in 2017. Overall score is used in the Comparison Diagram (see 3). *Monitoring & Research (CCC), Physical Amenity Survey (2017)*

12 Centre Photos *(Amenity focused)*

Photographs conveying selected landscape, streetscape and building qualities.
CCC Urban Regeneration, (2017)

SOCIAL WELLBEING

13 Social Wellbeing Map

Map of identified community facilities within 400m walking distance of each centre drawn from data and surveys. *CCC Food Hygiene, Alcohol Licencing, Parks, Ministry of Education, CINCH (filtered), CDHB + local surveys (2017)*

14 Catchment Statistics

Extracts of 2006/2013 census for mesh block areas lying mainly within 400metres walking distance of the centre. *Statistics NZ 2006,2013.*

15 Crime

Recorded crimes for 2016 and 2017 with the centre mesh block areas. *NZ Police, Victimisations Data extract for centres (data for 2 year period 01/01/16 – 31/12/17).*

16 Social Amenity

Categorised scoring of the presence of eight types of social and community facilities. Four point scale: 0, absent, 1, present, 2-3, some choices, 4+ many choices. Adapted from 2004/2010 methodology. Overall score used in Comparison Diagram (see 3).

17 Catchment Deprivation Profile

Deprivation index scoring of residential mesh block areas within 400m of the centre compared with city wide average. *Adapted from Department of Public Health, University of Otago, Wellington. NZDep2013 Index of Deprivation (May 2014)*

18 Land Use Zoning

Extract from current Christchurch District Plan.

TRANSPORT & ACCESS

19 Network Accessibility

Mapping of public and active transport infrastructure around the centre.
Abley Consultants - Commercial Centre Transportation Assessment Report (for CCC, 2017)

20 Network Safety

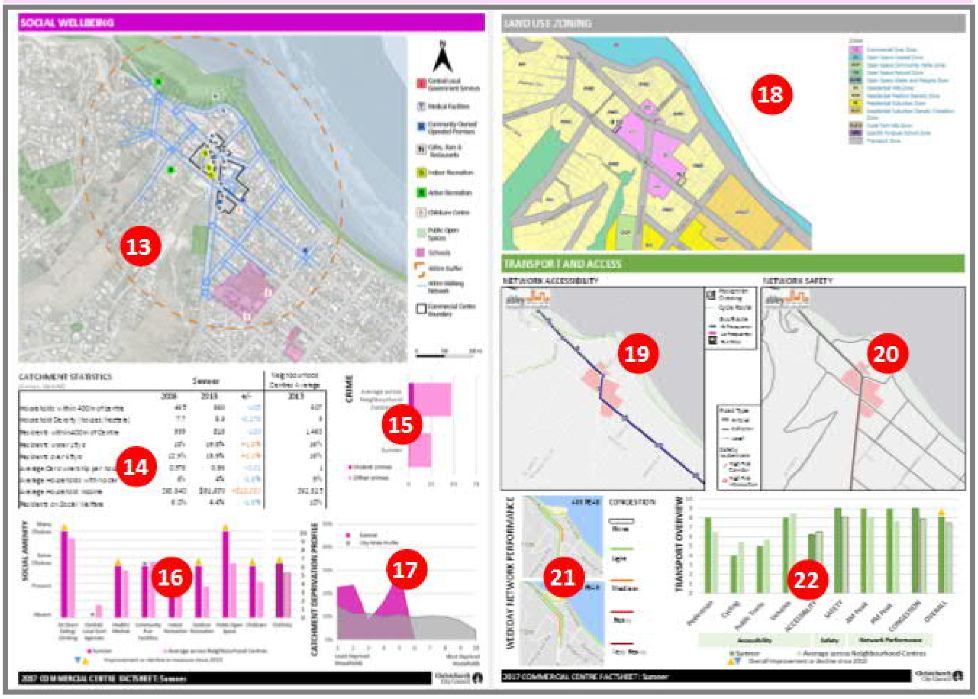
Mapping of Road types overlaid with high risk corridors and intersections defined in the KiwiRAP (Road Assessment Programme).
Abley Consultants - Commercial Centre Transportation Assessment Report (for CCC, 2017) using KiwiRAP data (AA/NZTA/ACC/NZ Police/MoT)

21 Network Performance

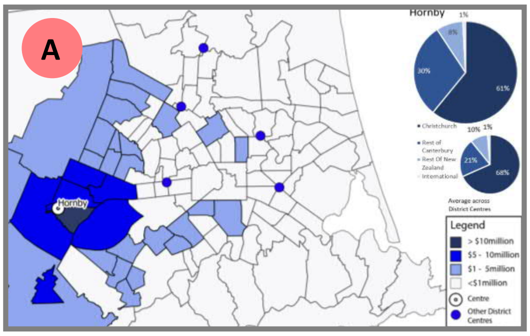
Mapping of peak time congestion at morning (0830) and evening peak (1700) times. District Centres include a Saturday lunchtime peak (1230-1430) map.
Abley Consultants - Commercial Centre Transportation Assessment Report (for CCC, 2017) using Google Maps traffic counts mapping.

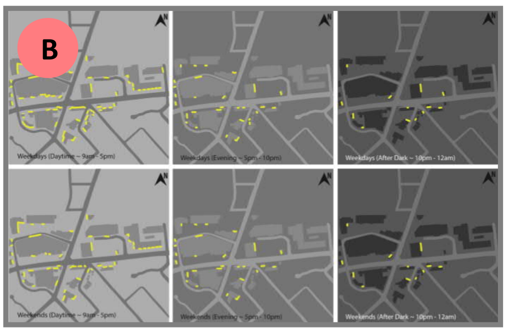
22 Transport Overview

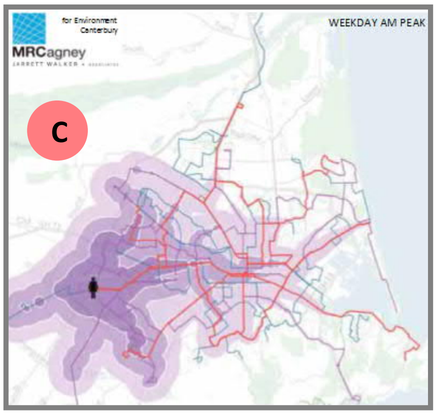
Categorised transport scoring across three sets of measures—Accessibility (by foot, bike, bus or vehicle), Safety and Congestion (am / pm peak). 2017 methodology has added the Accessibility data grouping. Overall score is used in the Comparison Diagram (see 3).
Abley Consultants - Commercial Centre Transportation Assessment Report (for CCC, 2017)



ADDITIONAL DISTRICT CENTRE FACTSHEET INFORMATION







A Sources of Spending

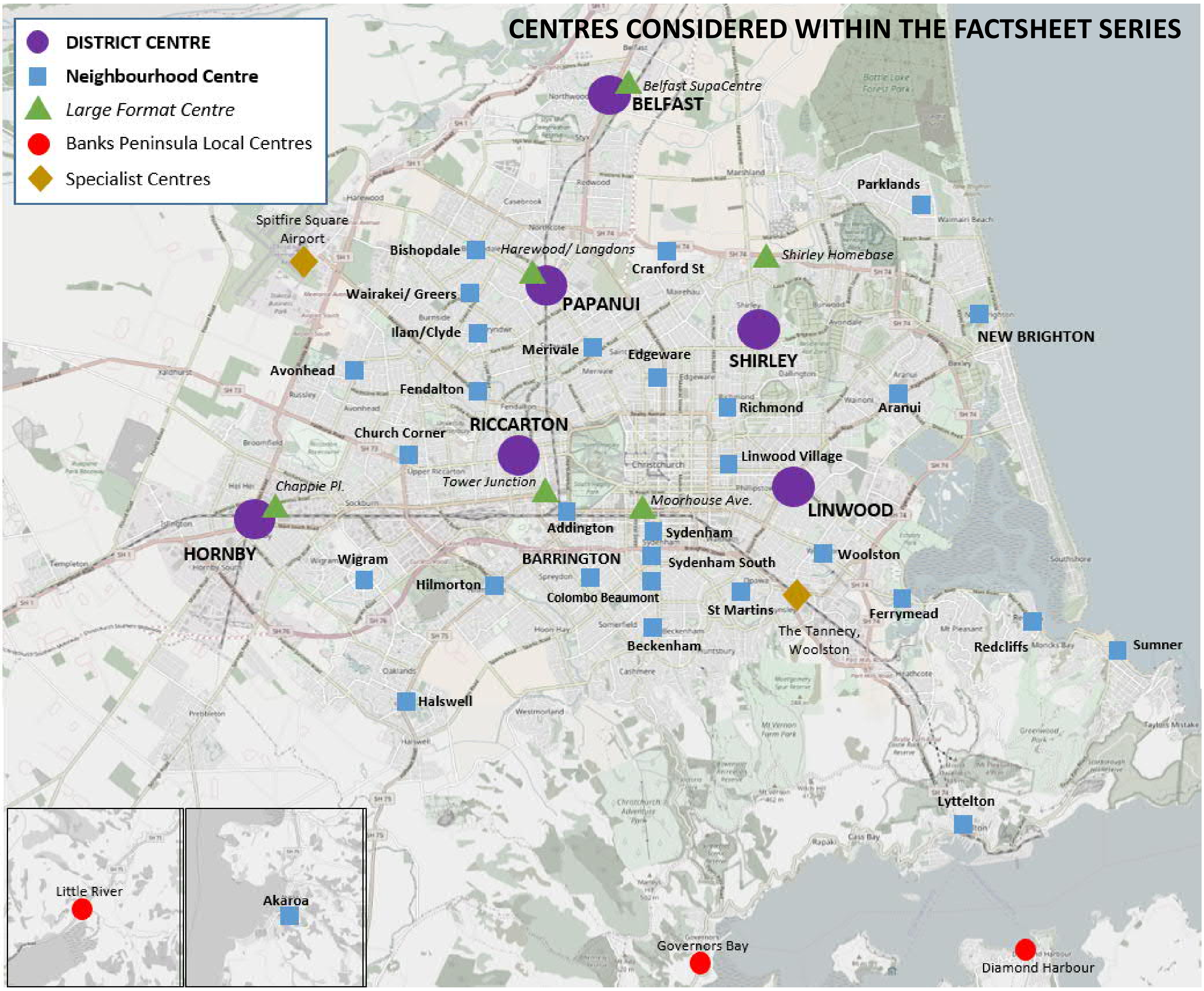
Mapping and graphics conveying where a centres spending originates from based on aggregated cardholder address data. Data is mapped by neighbourhood areas, with graphic showing regional, national and international spending (with average across all District Centres for comparison).
Marketview, Retail Centre Spending (for CCC, April 2017)

B Active Street Frontages

Mapping of the interactivity between all ground floor uses and the street. Survey work has identified *active frontages* by the extent of unobscured windows and doors fronting adjacent streets and spaces. Across 3 maps (for daytime, evening and late night time periods) the opening hours of premises with *active frontages* is shown giving a feel for the sense of activity/safety/vibrancy around different parts of the centre.
CCC Monitoring and Research, Ground Floor Activity Study (2017)

C Public Transport Reach

This mapping provides an overview of the frequency of services along key routes across the city. Overlaid are (isochrones) indicating typical distances over which a person can travel by public transport in 30, 45 and 60 minute periods from the centre concerned (marked with the person). It aims to give a view of the public transport accessibility to and from centres.
MRCagney Consultants - Transit Alternative Report (for ECAN, Nov 2015)



District Centres
BELFAST
HORNBY
LINWOOD EASTGATE
PAPANUI / NORTHLANDS
RICCARTON
SHIRLEY / THE PALMS

Neighbourhood Centres
Addington
Akaroa
Aranui
Avonhead
BARRINGTON
Beckenham
Bishopdale
Church Corner
Colombo/Beaumont
Cranford Street
Edgeware
Fendalton
Ferrymead
Halswell
Hillmorton
Ilam / Clyde
Linwood Village
Lyttelton
Merivale
NEW BRIGHTON
Parklands
Redcliffs
Richmond
St Martins
Sumner
Sydenham
Sydenham South
Wairakei / Greers
Wigram
Woolston

Large Format Retail Centres *(part of District Centres where indicated)*
Chappie Place, **HORNBY**
Moorhouse Avenue
Harewood & Langdons Road, **PAPANUI**
Shirley Homebase
Tower Junction

Other Centres
Specialist
The Tannery, Woolston
Spitfire Square, Airport
Banks Peninsula
Church Bay/Diamond Harbour
Governors Bay
Little River

KEY ACTIVITY CENTRES

Eight centres across the city are classified as KEY ACTIVITY CENTRES (KACs). These centres, as set out in the Canterbury Regional Policy Statement, are identified as focal points for employment, community activities, and the transport network; and which are suitable for more intensive mixed-use development.

All of the DISTRICT CENTRES are KACs along with Barrington and New Brighton. A new KAC has been identified for development at North Halswell in support of the city's south west growth area.

KACs are shown in ***CAPITALS****.*