Christchurch City Council

# New Brighton Water Park Facility Review

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**NOTE: FRONT COVER PHOTO SUPPLIED BY WHITEWATER WEST**

# 1 BACKGROUND AND PROJECT AREA

## 1.1 INTRODUCTION

Christchurch City Council decided in April 2012 to add New Brighton Centre to the Council's Suburban Centres Programme (SCP). The SCP was established after the February 2011 earthquakes to support recovery of suburban commercial centres. The program now consists of eight master plans and case management for all earthquake damaged centres.

Council approved the draft master plan for the New Brighton Centre in December 2012. Whilst previous master plans usually address pre-existing issues the New Brighton area had experienced substantial decline in recent years despite the investment in a new pier and library on the foreshore. The large business zone in the area reflects 1970's retail and commercial development so the master plan so reduction in the size of the centre, along with a variety of Council, landowner and initiatives to revitalise the centre is recommended.

At present the full extent of earthquake damage is unknown therefore the draft master plan indicates the potential for a significant "new look" centre. It indicates the relocation of a small supermarket site away from the beachfront to enable supermarket expansion and a more appropriate use for this prime location.

The master plan shows an "entertainment hub" on the site as a potential leisure orientated development (e.g. cinema, skate park etc.) should there be sufficient interest from the development community. The master plan does not indicate a change in zoning for the site at the moment.

Local consultation on the Draft New Brighton Centre Master Plan commenced in late 2012. At the same time two-community board members for the New Brighton area promoted a concept for a "metropolitan aquatic theme park ("Waterpark") to be located on the site shown in the Draft Plan for an Entertainment Hub.

Local consultation was completed on the draft plan and the majority of submissions received (Waterpark website received over 20,000 submissions in support of the concept) supported the Waterpark concept. This appears based on the intent to provide a significant 'wow' factor to entice visitors back to New Brighton and so provide a catalyst for local area and retail revitalisation.

A second alternate proposal has also been received that identifies key locations around New Brighton that could be developed as "leisure/aquatic attractions" with the aim of revitalising New Brighton including a hot salt-water pools facility on the foreshore.

The significant community interest in the project was noted and the Centre Master Plan will have some difficulty progressing further without some clarity over the size, nature and any major attraction in the centre. It has therefore commissioned this report to assist in reviewing the Waterpark project alongside other development options, and providing more detailed information so these options can be considered in terms of their interface with the Christchurch City Aquatic Facilities Rebuild Programme.

### 1.1.1 Aquatic Facilities Rebuild Programme

An Aquatic Facilities Rebuild Programme has been developed that links current operational aquatic centres with new facilities that are aimed to replace damaged and closed facilities whilst also taking into account changed population distribution and where new facilities should be located.

In line with this programme it is planned to construct a metropolitan aquatic facility in the central city area as well as a new community pool known as the Eastern Recreation and Sports Facility (E, R & S Facility) somewhere to the East of the City. The location and exact scope of the E, R & S Facility has not as yet been decided however a notional budget of $30.5M has been provided by Council plus a further $6.5M for water attractions (waterslides / aqua play area) provided by the Canterbury Earthquake Appeal Trust fund. It is anticipated at this stage that the E, R & S will include 3 indoor sports courts, a 25-metre pool, a 33 metre pool and leisure features such as a water slide/aqua play area and toddlers area. This facility has been classified as a local/suburban facility.

A summary of the Aquatic Facilities Rebuild Programme is listed in section 2.2 of this report and covers an overview of existing and planned aquatic facilities.

### 1.1.2 Aquatic Facilities Rebuild Programme and a New Brighton Waterpark

This report has also been commissioned to look at the feasibility of the New Brighton Waterpark concept in relation to the distribution of aquatic facilities across the city. The Waterpark is clearly seen by many as an opportunity to create a 'wow' factor to revitalise New Brighton and the opportunity to link to sea, swimming and leisure activities that could fit with the image of the suburb.

The earthquake has also seen the closure of some aquatic facilities including QEII, which was the closest aquatic facility for people living in the eastern area of the city.

The Aquatic Facilities Rebuild Programme recognises the significant loss of water related facilities in the east of the city. The ER &S Facility is planned to meet this need and a final site and configuration of facility components is still need to be determined.

As part of this local area debate there had also been some community support for relocating the planned Metro Sports Facility from the City centre to the east area.

This was considered and Council has reconfirmed that this is not an option as it is developing the Metro Sports Facility to cater for the city's wider population as well as major event and exhibition use. This requires a central city location to ensure best access for people across the City, as well as visitors to the area.

## 1.2 PROJECT ISSUES TO BE ADDRESSED

This report has been completed to address the following specific areas of review and analysis:

1. The location and scale of the Waterpark concept in New Brighton with respect to relevant Council-approved criteria.

2. The 'right size' of any private or publicly funded aquatic facility within New Brighton, considering all relevant information including the wider aquatic network, catchments, and other relevant economic and social factors.

3. Implications, including community participation, legacy value and financial viability, of having two metropolitan sized aquatic facilities in the City should both the Metro Sports Facility and the Waterpark establish with a full complement of slides, wave pools etc. as currently proposed.

4. Impact/effect of the New Brighton Water Park and other development options listed below on the planned Metropolitan Sports Centre and on Central City revitalisation.

5. Evaluation of the Water Park and other development options listed below, in terms of their establishment and maintenance costs, including build costs, land purchase, patronage and viability. This should also take into account potential location in a coastal environment and any relevant geotechnical constraints.

6. Feedback on the information supplied by the proponents of the New Brighton Water park

7. Evaluate the development options listed below, assessing their economic feasibility and relative strengths and weaknesses in relation to the wider aquatic network;

The development options to be evaluated included:

- A Waterpark in New Brighton that incorporates a Council ER &S Facility (including other non aquatic areas such as indoor sport courts, health and fitness areas etc.).
- A New Brighton Waterpark, additional to the Council ER & S Facility located elsewhere in the East of the City.
- A Council ER &S Facility (with on new Waterpark in the area) located either:
    - In New Brighton: or
    - Elsewhere in the East of the City
- A blend of locations and facilities – for example:
    - A boutique salt water pool in New Brighton to complement an ER&S facility elsewhere
    - All aquatic entertainment elements in New Brighton and a reduced scale/fitness orientated ER&S Facility elsewhere.
- Any other aquatic development options considered by the consultant to be appropriate for further consideration.

## 1.3 SCOPE OF THIS REPORT

The report has been completed in a four-week timeframe to assist with reviewing all known and available aspects of the Waterpark concept in association with Councils Aquatic Facilities Rebuild Programme and the known current and future Eastern area population trends.

The report has been prepared as an "opportunity review" taking into account all known factors whilst also considering likely impacts based on industry trends and experience for such specialist developments. The project timeframe has not allowed for detailed consultation with the Waterpark proponents other than initial contact to allow them to explain the concept and ideas. It has also restricted any testing of community interest or demand for any of the concepts under review.

The report has therefore also aimed to minimise the use of technical language and be easily understood so it forms a recommended way forward for Council. The recommendations in this opportunity report once reviewed should also then be subject to more detailed feasibility, design and business planning plus detailed site reviews to enable final assessment.

## 1.4 PROJECT AREA OVERVIEW

New Brighton is a coastal suburb of Christchurch, New Zealand, about 8 kilometres to the east of the city centre. Its residential catchment extends from Waimairi Beach to the north and to South New Brighton (The Spit) to the south. This catchment also encompass land to the west of the Avon River, much of which is now located within the residential red zone. The New Brighton area covers approximately 2.7891 km².

New Brighton's location close to the sea and Avon River corridor makes a strong contribution to the character and appeal of the suburb. New Brighton is a lower socio economic area, with a range of demographic diversity along lines of age, gender and ethnicity.

New Brighton serves as a key recreation destination for the Greater Christchurch region as well as providing extensive recreation opportunities to meet local needs. Many people are drawn to live in the New Brighton area because of the natural environment and recreation opportunities that it offers. In addition to surfing, swimming, walking, and fishing from the Pier, some recreational activities make use of the prevailing easterly wind.

**Figure 1New Brighton**


### 1.4.1 New Brighton Population and Community Overview

This section identifies some of the relevant population, economic and social characteristics of the New Brighton area and compares them to the Christchurch City averages.

- Within the identified catchment, there is currently an estimated population base of over 16,000 and comprising around 7,000 households, giving an average household size of 2.3 (rounded). This is slightly lower than the Christchurch City average of 2.5. The catchment represents around 4% of all households in Christchurch City.

- The catchment has a significantly lower average annual household income compared to the wider city average ($57,100 vs. $67,600).

- The lower average annual household income also correlates with the proportion of white-collar workers within the catchment, where 64% of workers in the catchment are in white collar employment, compared to 70% in the wider city. 'White Collar' employment in general has slightly higher remunerations than 'blue collar' employment helping fuel this differential.

- The New Brighton Catchment also has a higher proportion of single households and single parent families compared to the Christchurch City average (29% and 14% vs. 25% and 12% respectively). Smaller family sizes can also attribute to lower average household incomes as there is a lower probability of there being multiple income earners per household.

### 1.4.2 Population and Household Forecasts

The household and population forecasts used for this report have been based on projections provided within the New Brighton Economic Assessment Report undertaken by Property Economics October 2012. CCC/CERA[1]. Table 1.1 displays the population and household growth projections in the identified catchment.

**Table 1.1**
**New Brighton Population/Households Future Forecasts 2012 to 2031**

| Category | 2012 | 2016 | 2021 | 2026 | 2031 |
|---|---|---|---|---|---|
| Population | 16,065 | 16,086 | 15,931 | 16,001 | 16,153 |
| Households | 6,967 | 7,124 | 7,148 | 7,288 | 7,396 |
| Household Size | 2.31 | 2.26 | 2.23 | 2.20 | 2,18 |
| Population Growth (p.a.) | | 0.07% | -0.19% | 0.09% | 0.19% |
| Household Growth (p.a.) | | 0.55% | 0.07% | 0.39% | 0.29% |

The identified catchment has a current population base of approximately 16,060 people residing in around 7,000 households. This is projected to increase to around 16,150 people and 7,400 households over the forecast period to 2031.

This represents a stagnant population base and household growth of only around 8%. This equates to an average growth rate of only around 22 'new' households per annum, excluding rebuilds as a result of the earthquakes.

Comparatively, households in the wider Christchurch City area are forecast to grow by 26% over the same period, which suggests the catchment is projected to grow at a rate less than a third of that of the wider Christchurch market over the assessed period.
This is not surprising given the level of residential displacement and 'red zone' land in/around the catchment.

Table 1.1 data also indicates that the number of households is increasing at a faster rate than the population due to a projected fall in the person per dwelling ratio over the forecast period. This is not isolated to the study area, but a trend projected to occur across the whole

[1] Scenario 2: Quick Recovery – Christchurch Growth Model 2012: UDS Scenarios

country due to an aging population, smaller families and a higher proportion of 'split' or single parent households.

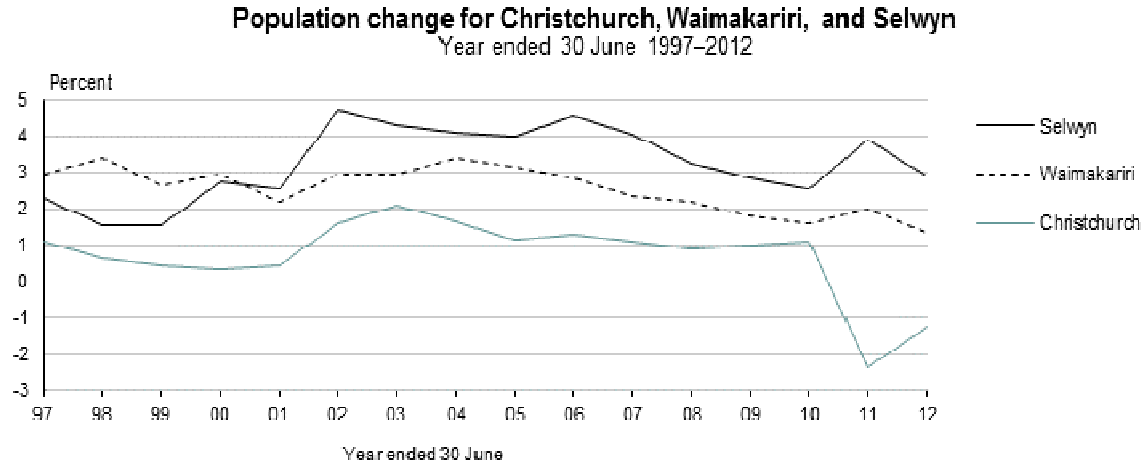
This is most evident during the 2016 - 2021 periods where there is household growth due to falling person per household levels, however population within the catchment decreases until 2026 where household growth is forecast to outstrip the limited number of dwellings with fewer residents.

### 1.4.3 Christchurch Population

Before the 2010/11 Canterbury earthquakes, Christchurch city's population was approximately 376,700 and was growing. In the four-year period ended 30 June 2010, the city's population grew at an average annual rate of 1.0%, with population gains from both natural increase (2,200 per year on average) and net migration gain (more arrivals than departures) of 1,600 per year on average.

The latest population estimates indicate that Christchurch city's population decreased by 4,600 (1.2%) in the June 2012 year to approximately 363,200. This population decrease was due to a net migration loss of 6,000, partly offset by a natural increase of 1,400.

In the previous June year, Christchurch city's population decreased by 8,900 (2.4%) due to a net migration loss of 10,600, partly offset by a natural increase of 1,600. Therefore, in the two-year period ended 30 June 2012, the city's population declined by 13,500 (3.6%) due to a net migration loss of 16,600, partly offset by a natural increase of 3,100.




Source: Statistics New Zealand

Between 30 June 2010 and 2012, the population aged 0–19 years in Christchurch city decreased by 9,300 (9.6%), while the population aged 35–49 years decreased by 5,700 (7.0%). This indicates a net outflow of children and their parents over this period. A decrease of 2,900 people aged 15–19 years reflects fewer young adults moving to Christchurch to study.

Within the younger adult population, however, there were some interesting contrasts. The male population aged 20–34 years increased by 500 over the two-year period, while the corresponding female population decreased by 1,700. This reflects a net inflow of young

male workers.

Over the two-year period, the population aged 50 years and over (50+) grew slightly, up 2,700 (2.3%). This was due to people moving into this age group from younger ages, but it also indicates that people aged 50+ were less likely to leave Christchurch over this period.

### 1.4.4 Canterbury Region

Water park facilities and major aquatic facilities, depending on the facilities, components and attractions provided, attract a far wider catchment than a local or suburban aquatic and leisure centre. It is therefore essential to understand the wider catchment opportunities that a water park facility in New Brighton may attract.

Christchurch falls within the Canterbury region, which also includes the territorial authorities of Kaikoura, Hurunui, Selwyn, Waimakariri, Ashburton, Mackenzie, Timaru, Waimate and Waitaki. The current population of the region is approximately 558,800 people.

The population of the earthquake-affected Canterbury region was estimated to have decreased by 1,800 people (0.3%) in the June 2012 year.

This compares with a decrease of 5,000 (0.9%) in the June 2011 year.

Excluding Christchurch, the remainder of the Canterbury region grew 2,800 (1.4%) in the June 2012 year. This compares with an increase of 4,000 (2.1%) in the June 2011 year.

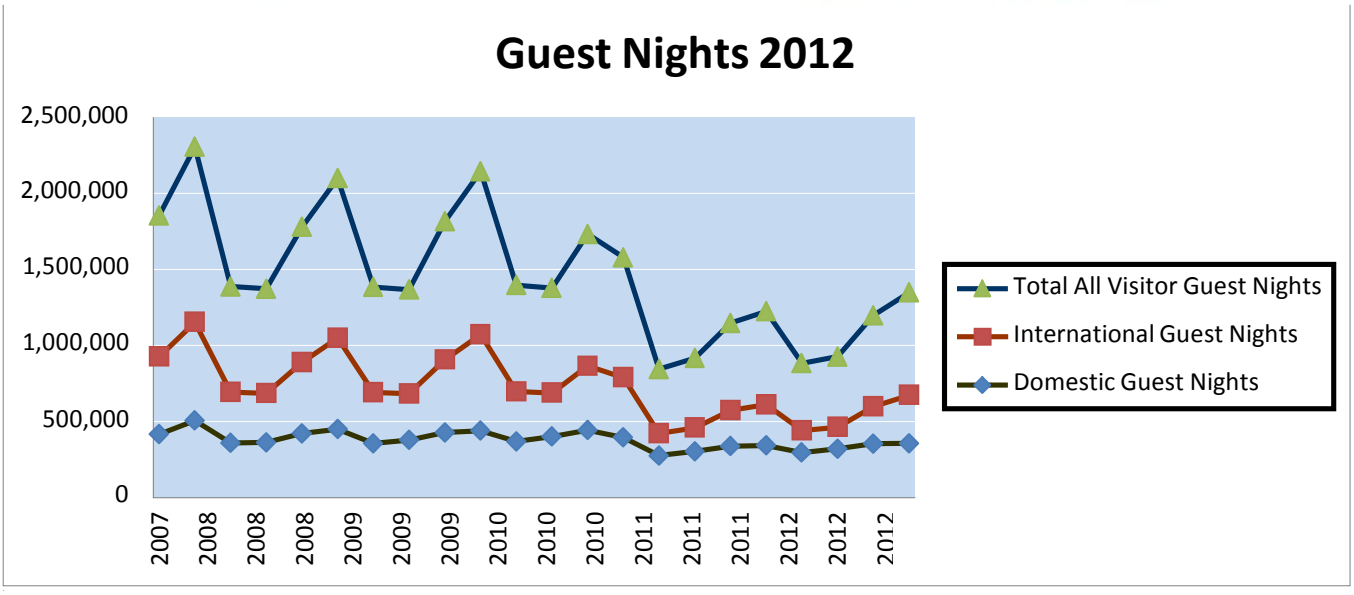
**Figure 2: Canterbury Region**

### 1.4.5 Tourism Visits to Christchurch and Canterbury Region

A review of tourism visits to the Christchurch and Canterbury region has been completed to ascertain the potential visitor market to an aquatic/water park facility. The review indicates the following guest nights in 2012.

- **Total guest nights** **2,830,980**
- International guest nights 1,115,307
- Domestic guest 1,715,673
- Average length of stay 1.98 nights

The 2010 and 2011 earthquakes have significantly impacted the numbers of visitors to the region. The graph on the next page indicates the decrease in visitors over the last 3 years.




## 1.5 POPULATION CHANGES RELEVANT TO AQUATIC FACILITIES PROVISION

Demographic change within Greater Christchurch has and will continue to occur as a result of the earthquakes and changes now in land use.

Anticipated changes include the effect of red zones (no build areas) and changed land classifications. Changes are expected to the uptake of new sections and the overall growth of the city.

The Aquatic Facilities Plan 2006 was informed by the demographic assumptions of the Greater Christchurch Urban Development Strategy 2007 and these assumptions have changed as a result of the quakes.

This section of the Review aims to summarise identified demographic changes that are relevant to the provision of aquatic facilities throughout the city.

The primary source of information is the Greater Christchurch Housing Scenarios 2011 to 2041 study commissioned by the UDS partners to inform their planning processes. Under the Greater Christchurch Household Scenarios model a "quick recovery" scenario is recommended for informing planning exercises and this sees:

- An initial population loss of 2.5% for Christchurch City.
- Slow growth until 2016.
- Stronger recovery over 2016 to 2021.
- A medium to high growth trend after 2021 matching the pre-earthquake growth trend but lagging by about seven years.

Table 1.2 details the predicted demographic change, the effect on the provision of aquatic facilities and how this effect may be mitigated.

**Table 1.2**
**Predicted Demographic Change and Aquatic Facility Impacts**

| Predicted demographic change | Effect on provision of Aquatic facilities | Possible Mitigation of Impact |
|---|---|---|
| **Red zones** | | |
| Evacuation of red zones possibly lowering the population in the eastern area:<br>▪ People will evacuate the red zones<br>▪ Surveys indicate 81% of eastern red zone evacuees intend to remain in Christchurch, of these 31% intend to remain in the east[2]<br>▪ There will be a non-urban area dividing north and south east<br>People moving out of areas more severely affected by the quake, especially the eastern suburbs, potentially lowering the density of population in the eastern area.<br>▪ A large new sub-division with 2,700 sections is opening on Preston's Road<br>▪ 1069 of red zone households that have settled with CERA have settled in Christchurch the preference being the north and east[3] | ▪ Local aquatic facility capacity lost due to the quakes needs to be replaced<br>▪ Better use of existing providers' facilities warranted<br>▪ Need to cater to the Preston's Road growth in time | ▪ Provide an aquatic facility in the north east to cater to local area and community needs<br>▪ Provide an aquatic facility in the centre of the city<br>▪ Support the operation of the Sumner community pool<br>▪ Explore partnerships with the Ministry of Education (MOE) and local communities on community use of selected school pools<br>▪ Continue collaboration with Aquagym on school swimming and swim education<br>▪ Sustain the temporary pools if feasible as a transition to new facilities |
| **New sub-divisions in the north and south west** | | |
| **Predicted demographic change** | **Effect on provision of Aquatic facilities** | **Possible mitigation** |
| The development of new sub-divisions and occupation of existing new sub-divisions is accelerating. This development is focused on the north and south west of Christchurch[4]:<br>A large new sub-division with 2,700 sections is opening on Preston's Road<br>▪ 2244 new sections were zoned pre-quake in Aidanfield, Westmorland and Marsham<br>▪ 9115 new sections are included in a plan change made operative since the quake at Preston's Road, Belfast Park, Wigram Skies, Awatea and Halswell West<br>▪ 2100 sections have a plan change lodged at Highfield and Belfast<br>▪ 9651 sections exist on green field sites signalled for rezoning at East Belfast, Upper Styx, South Marsham Sparks road, Cashmere Fields, Henderson's Basin, and Halswell<br>▪ The location of new sub-divisions is primarily in:<br>  ▪ North east: Preston's Road<br>  ▪ North: Belfast, Belfast Park, East Belfast, Upper Styx, Highfield<br>  ▪ West: Marsham, South Marsham<br>  ▪ South west: Wigram Skies, Awatea, Aidanfield, Sparks Road, Halswell West, SW Halswell, SE Halswell, South Halswell, Henderson's, Westmorland<br>This review assumes that accelerated development of new subdivisions will occur primarily in the north from Preston's to Upper Styx and the south west from Wigram to South Halswell | ▪ Local aquatic facility capacity lost due to the quakes needs to be replaced in the north east<br>▪ Need to cater to the Preston's Road growth in time<br>▪ The Graham Condon centre caters to the growth in the north<br>▪ New facilities can cater to growth in the south west for 5 to 9 years | ▪ Provide an aquatic facility in the north east to cater to local area and community needs<br>▪ Develop children's aquatic recreational facilities at Jellie Park<br>▪ Support existing provision at Belfast, Jellie Park, Pioneer, Graham Condon, Templeton, Pioneer, Halswell and Kings<br>▪ Assist in the evaluation of the future of the indoor pool at Canterbury Christian College (Aidanfield, in the South West)<br>▪ Conduct a review in five years time on the need for an aquatic facility in the west/south-west<br>▪ Note the development of the Rolleston Aquatic Centre and the Canterbury Swim School Aquatic Centre<br>▪ Offer to review the condition of the Canterbury Christian College Pool<br>▪ Land provision for an aquatic facility in the west/south-west should be made in planning processes now |

[2] Based on Red Zone Intentions Survey 2011
[3] Location of households who have settled with CERA/purchased within Christchurch City 2012.
[4] The location of new-subdivisions is illustrated on the map of aquatic facilities in section 2.4.5 of this report.

| Forecast growth of Christchurch against the forecast in the UDS | | |
|---|---|---|
| **Predicted demographic change** | **Effect on provision of Aquatic facilities** | **Possible mitigation** |
| The overall growth of Christchurch slows limiting the need for increased provision of aquatic facilities<br>▪ Under the Greater Christchurch Household Scenarios a "quick recovery" scenario is recommended being:[5]<br>o An initial population loss of 2.5% for CC<br>o Slow growth until 2016<br>o Stronger recovery over 2016 to 2021<br>o A medium to high growth trend after 2021 matching the pre-earthquake growth trend but lagging by about seven years<br>An initial population loss and by 2021 Christchurch's growth trend will remain consistently 7 yrs. behind pre-quake forecasts | ▪ A delay on building aquatic facilities in response to the cities growth in the south west is justified for between 5 and 9 years or until further information is available | ▪ Conduct a review in five years time on the need for an aquatic facility in the west/south-west<br>▪ Land provision for an aquatic facility in the west/south-west should be made in planning processes now |
| **Target Populations for Aquatic Facilities** | | |
| Demographic changes for populations specifically targeted by Council may differ from demographic changes to the total population<br>▪ Population mapping exercises for under 15's and over 65's in 2011 and 2031 under two scenarios confirm that changes for these target populations align with changes to the general population[6]<br>▪ Population mapping indicates that there is a greater need to cater for under 15's in 2011 than 2031<br>▪ Population mapping also shows the significant growth on the over 65's by 2031 | ▪ Needs of under 15's and over 65's are catered in the design of aquatic facilities with assumptions based on the total population will serve these target groups. | Aquatic facilities need to cater to the education, health, sport, recreation and excitement needs of under 15's and over 65's |

[5] Based on quick recovery scenario.
[6] Population data based on Scenario 2: Quick Recovery – Christchurch Growth Model 2012: UDS Scenarios.

# 2 CURRENT AND FUTURE CHRISTCHURCH AQUATIC FACILITY PROVISION

## 2.1 INTRODUCTION

In June 2006 the Christchurch City Council adopted the Aquatic Facilities Plan, a city-wide plan informing Council's role in the provision of aquatic facilities over a period of 30 years[7]. At this time Council provided for a five year desktop review of the plan in order to maintain the relevance of the Plan against demographic and societal changes over time.

The draft five year review was completed in February 2011 but its relevance was superseded by the effects of the February and June earthquakes of 2011. As a result in June 2011 Council requested a review of the Aquatic Facilities Plan and the findings of this review were reported back to Council in June 2012.

This report found that the nature and condition of Council's existing aquatic facilities and the demographic predictions of the Greater Christchurch Urban Development Strategy 2007 informed the Aquatic Facilities Plan 2006.

The earthquakes of 2010 and 2011 extensively damaged Council's network of aquatic facilities as well as producing demographic change not anticipated by the Aquatic Facilities Plan 2006 or the Greater Christchurch Urban Development Strategy 2007.

This section of the report covers Council's current proposed aquatic facility planning to contribute to the city's recovery for these service areas. As a result Council is currently making changes to its network of aquatic facilities and the way it works with other facility and program providers.

## 2.2 KEY ACTIONS COMPLETED FROM THE AQUATIC FACILITY PLAN 2006

The following table provides a summary of key actions that had been undertaken prior to the earthquakes, based on the 2006 Aquatic Facility Plan.

**Table 2.1**
**Christchurch CC Aquatic Plan 2006 Actions Summary**

| 2006 Plan Recommendation | Implementation/Key Actions |
|---|---|
| **Close Papanui outdoor pool** | Completed 2006 |
| **Close Sockburn Pool and Recreation Centre** | Completed 2009, centre has reopened as a highly successful Canterbury Squash Centre with third party support |
| **Close Edgeware Pool** | Completed 2007 |
| **Redevelop Jellie Park** | Completed 2008 |
| **Build Graham Condon** | Completed 2011 |
| **Build a Pioneer LTS pool** | Completed 2012 |
| **Close Belfast Pool became Keep Improved Belfast pool open.** | With Council and third party support the pool has been redeveloped under a highly successful school, community and Council partnership so this pool was kept open. |
| **Review Templeton Pool** | Season extended in 2009/2010 |
| **Close Woolston Pool** | Completed 2009 |

[7] The Aquatic Facilities Plan 2006 is available at Council's website www.ccc.govt.nz

| 2006 Plan Recommendation | Implementation/Key Actions |
|---|---|
| Review condition of Wharenui Pool | Completed in 2009, all asset actions complete, currently undergoing a second review due to quake damage |
| Review location of south western pool | Completed in early 2010, preference for Hornby but a close call with Wigram |
| Advocate for bus routes to pools | Completed in 2008 and ongoing, pools successfully on bus routes |
| Trial free bus services to pools | Completed, trialled in 2007/2008 with the closure of Jellie Park, services not used |
| Support the operation of selected school pools | Ongoing, numerous schools supported in a number of ways that best match their needs and the services of Council |
| Encourage third parties to contribute to aquatic facilities | Ongoing, larger examples include QEII slides, three specialist pools at QEII, Graham Condon |
| Establish a fund for school pool repair | Ongoing, optimum value is to supply spare plant and equipment, provide expertise, encourage use of existing Council funding opportunity and connect schools to third party funders |
| Partner with WSNZ, Skills Active and Royal Life to deliver swim education to schools | Ongoing, the Kiwiswim programme will provide over 80,000 lessons in 2012[8] |
| Targeted assistance with school transport costs | Ongoing, CCC has secured funding to cover the transport costs of low docile schools accessing swim education and bulk purchased a 50% discount on many of the historical transport charges[9] |
| Discounts for low docile schools to access swim education | Ongoing, partnerships with Sport Canterbury Swimming NZ and WSNZ have eliminated transport costs and substantially reduced tuition costs[10] |
| Provide incentives to use outdoor pools | Ongoing, transport, swim education, event and marketing initiatives funded through partnerships with third parties[11] |

The review of the above information is required to understand the wider network of aquatic facilities and how the existing facilities will impact on the future direction of aquatic facilities in New Brighton and the wider east.

**In reviewing these actions it should be noted that:** The redevelopment of Jellie Park resulted in the removal of the outdoor children's pool and a dramatic intensification in the use of indoor shallow water for swim education. This has resulted in a lack of recreational facilities for children and is now the only "gap" in Jellie Park being a first class local aquatic centre.

In order to meet community need children's aquaplay facilities need to be installed. At a minimum this should be an outdoor pool to replace the pool lost in the redevelopment and provide a safe shallow pool. Ideally children's facilities should be able to operate year round.

### 2.2.1 Summary of Aquatic Facility Attendances 2006 to 2010

The following table summarises the combined visitations to Councils aquatic, recreation and sport facilities between 2006 and 2010 (pre quakes).

[8] The Kiwiswim programme is a recognised national programme
[9] As per the Kiwiswim programme
[10] As per the Kiwiswim programme
[11] As per the Kiwiswim programme

**Table 2.2**
**Annual Visitations to CCC Aquatic, Recreation and Sports Facilities 2006 to 2010**

| Year | Total Visitation at Council's Recreation and Sports Centres | Comment |
|---|---|---|
| 2006/2007 | 4,162,009 | |
| 2007/2008 | 3,992,172 | Jellie Park closed for redevelopment |
| 2008/2009 | 4,289,623 | Jellie park re opens |
| 2009/2010 | 4,702,736 | |

### 2.2.2 Earthquake Impacts on Council Aquatic Facilities

The earthquakes of September 2010 and February, June and December 2011 had a dramatic effect on the ability of Council's range of aquatic facilities to effectively deliver the levels of services they were built for[12]. Table 2.3 below summarises Council aquatic facilities known issues and updates their condition and anticipated operational lifespan as at July 2013.

**Table 2.3**
**Condition of CCC Aquatic Facilities July 2013**

| Facility | Map Key[13] | Projected Lifespan | Condition/Status on 1st July 2013 |
|---|---|---|---|
| QEII | 1 | None | Closed and now demolished |
| Centennial | 2 | None | Closed and damage exceeds insured value. Considered unrealistic to repair so demolition to occur. Please refer to map in section 2.4.5 of this report. |
| Pioneer | 3 | Over 20 years | Open. DEE assessment completed, damage assessment in progress, moderate building, pool and mechanical repairs expected |
| Jellie Park | 4 | Over 20 years | Open. DEE assessment, damage assessment in progress, substantial and lengthy building, pool and mechanical repairs expected |
| Graham Condon | 5 | Over 20 years | Open. Structurally and mechanically in good shape, minor repairs needed |
| Halswell | 6 | Over 20 years | Open: DEE assessment completed. Structurally and mechanically in good shape. Some repairs completed on plant room, additional permanent works required on plant room and swimming club as repairs are temporary in nature |
| Wharenui | 7 | Unclear | Pool Open: Pool building 35 – 40 % NBS and considered vulnerable. Pool plant in working order.<br>Stadium Closed: 11% NBS Damage assessment underway to determine scope and cost of repair and strengthening |
| Waltham | 8 | Unclear | Closed: DEE assessment completed. Damage assessment complete, the site is repairable however low insured values will rely on council input of money to repair/reinstate |
| Lyttelton | 9 | Unclear | Closed: DEE assessment completed. Options report and community working group examining options to rebuild/replace. Extensive damage, retaining wall split, buildings damaged and the facility appears to be slumping downhill |
| Governors Bay | 10 | Over 10 years | Open: Pool tank is intact, buildings are structurally damaged and securely stabilised and need replacement. DEE assessment completed and damage assessment 90% complete |
| Belfast | 11 | Over 20 years | Open: Structurally and mechanically in good shape. DEE assessment completed. |
| Templeton | 12 | Over 20 years | Open: Structurally and mechanically in good shape, minor repairs needed. DEE assessment completed. |
| Sumner | S | Over 20 years | Open: Structurally and mechanically in good shape, minor repairs needed. DEE assessment not completed as at 18th July 2013 |

[12] Strategic outcomes are detailed in Activity 7.0: Recreation and Sports Services in Council's 2009/2019 LTCCP
[13] A map of aquatic facilities are included in section 2.4.5 of this report.

## 2.3 DESKTOP REVIEW OF AQUATIC FACILITY PLAN JUNE 2012

This section of the report provides a summary of the Christchurch City Council's internal review of 2006 Aquatic Facility Plan. It should be noted that this section is a summary of updated planning documents and does not include recommendations from this studies review conducted by SGL. Any content added by SGL has been aimed at adding greater specific detail and is listed in italics.

The planning documents reviewed indicate Council's Aquatic Facilities Plan 2006 had been successfully implemented over the period 2006 to 2010 and this resulted in increasing participation, improved customer satisfaction, greater access to swim education and best practice asset management.

The earthquakes of 2010 and 2011 extensively damaged Council's network of aquatic facilities and has now produced demographic change not anticipated by the Aquatic Facilities Plan 2006.

As a result of the facility damage and demographic change Council needed to make changes to its network of aquatic facilities and the way it works with other providers.

The following overview lists the known opportunities for Council's aquatic facility planning to contribute to the city's recovery and is summarised by precinct or area as follows.

### 2.3.1 Central City

The plan supports a large central city aquatic centre as part of the Metro Sports Facility envisaged under the CCP and the Draft Annual Plan 2012/2013 conditional on it being at the optimum location[14], good alignment with the transport network, correct components and appropriate timing. This is aimed to:

- Accrue the benefits from Christchurch's major sports facility (replacing QEII) to the city centre as part of the redevelopment and revitalisation, and
- Optimise the benefits for recreation and sport, one of Christchurch's distinctive strengths, by linking major wet, dry and green facilities together in the city centre (replacing QEII hub).

*The Metro Sport Centre project should begin in 2013 and contain the following components:*

***1. Aquatic Areas:***

- *Swim education pools ---- so our kids grow up swimming not drowning*
- *Movement, therapy and multi sensory pools ---- for those with different needs, to support a burgeoning health precinct and an aging population*
- *High performance 50 metre and deep water pools ---- to drive participation in aquatic sports, fitness and health and attract the best events and support health and sports research*
- *Mix of leisure pools and features ---- to encourage visitors to stay in Christchurch for one extra day and give our locals the best in the country, for example:*
    - *Themed spa pools*
    - *Rapid river, wave or themed pool*
    - *Sauna, steam and therapy rooms/pools*

[14] The location is represented on the facilities map as a "M" in section 2.4.5 of this report

- *Terrifying slides and a major aquatic themed attraction integrated into the facility design*
- *Children's interactive aquaplay*

- *Spaces for business ---- medical, sport science, retail, hospitality, sport administration, to grow a centre of excellence*
- *Spaces for a fitness gym, group exercise, coaching, meeting and instruction*
- *Event hosting facilities to FINA standard and up to 1,000 competitors and 3,000 spectators.*

***2. Indoor Sport***

- *Up to 8 indoor sport courts*
- *Major spectator seating to accommodate franchise sports team events, national championships and special events.*
- *Multiple change facilities to meet team and community use.*
- *Event competitors entry areas*
- *Large storage spaces.*

### 2.3.2 North East

A recreation and sports centre containing indoor pools, a gym and group exercise facilities should be built in the north east of the city primarily to cater to the current and future needs of northern and eastern area communities[15]. It will also provide an opportunity to engage in aquatic sports.

Aquatic facilities should include shallow and deep lane pools, children's aquatic leisure facilities, swim education pool, spa, sauna and steam rooms. The optimum location needs detailed site analysis but the preferred area exists north of the Avon, east of Marshlands Road and West of Bower Avenue[16]. The facility should form the centre of a vibrant sporting hub.

### 2.3.3 South West

Under the Aquatic Facilities Plan 2006 an indoor aquatic facility was recommended for the west south/west. It was scheduled for the period 2014 to 2018 in the 2009/2019 LTCCP. The preferred location was Hornby. The need for this facility is not as immediate as in 2006. This is because:

- The population growth that justified it being scheduled between 2014 and 2018 is lagging about seven years behind.
- Community need has been alleviated by the:
    - Opening of the Kings Swim School in Sockburn,
    - Opening of a dedicated LTS pool at Pioneer,
    - Development of the Rolleston Aquatic Centre opening in 2013
    - Canterbury Swim Centre opening a 25m lane pool and a learn to swim pool in Hornby[17].

The need and timing for a west south/west facility should be reviewed in 2017 if the growth patterns meet expectation and community need is not accommodated by the alternatives being developed. Care should be taken not to raise community expectation by making a binding commitment at this stage however land provision for an aquatic facility in the

[15] Population data based on Scenario 2: Quick Recovery – Christchurch Growth Model 2012: UDS Scenarios.
[16] The location is represented on the facilities map as a "N/E" in section 2.4.5 of this report
[17] Population data based on Scenario 2: Quick Recovery – Christchurch Growth Model 2012: UDS Scenarios

west/south-west should be made in planning processes now as the need will arise it is just a question of when.

### 2.3.4 East

Under the Aquatic Facilities Plan 2006 an indoor aquatic facility was recommended for the east of the city if Aquagym was not to be retained. It was scheduled for the period 2016 to 2019 in the 2009/2019 LTCCP. Aquagym is being retained and has been fully repaired post quake.

Aquagym have developed plans for a second pool. The opportunity exists to work with the MOE and community groups to save school pools and open them to community use through three way partnerships. This has worked well in Belfast.

Potential options include Opawa (indoor pool), Bromley and possibly New Brighton. Such a partnership could save school pools and provide cost-effective community access to pools at a very local level. If a large aquatic centre is developed in the central city along with an aquatic facility in the north east as proposed in this review, Aquagym is retained and school-community partnerships are supported, this review concludes that another indoor pool in the East is not needed.

***Update to the June 2012 Desktop Review: Due to the closure of QEII and the loss of aquatic facilities for local users, Council has indicated they wish to provide a level of service in the North East to cater for this loss. The Metro Centre will cater for major international and national events and cater for the rejuvenation of the central city and provide major aquatic and leisure facilities for the entire city.***

### 2.3.5 Wharenui – Waltham – Lyttleton

The Wharenui pool building is rated 35 to 40% new building standard (NBS) and is therefore considered vulnerable. The stadium is closed as it is below 34% NBS with the extent of damage rendering the practicality of repair unclear.

Wharenui is an old facility coming to the end of its useful economic life. The community need currently delivered from Wharenui should be accommodated in the central city aquatic facility and Council's facilities rebuild process should be followed to establish practicality of repair and useful economic life. Council's facilities rebuild process should be followed to establish practicality of repair and useful economic life of Waltham and Lyttelton outdoor pools.

### 2.3.6 Outdoor Pool Partnerships

Council should formalise support for the operation of the Sumner Pool as a level of service in the long-term plan. Support is best channelled through asset maintenance and utilities in return for community access to the facility over summer[18]. This will provide certainty of operation, good asset management and create a better platform for the community to leverage third party support.

Council has developed a benchmark partnership with the MOE (Belfast school) and the community (Belfast Community Network) over the operation of Belfast Pool. Each party has a strategic and financial interest in success.

[18] The location is represented on the facilities map as a "S" in section 2.4.5

Opportunities exist to establish similar partnerships that will keep community and MOE pools open primarily in communities outside close proximity to other aquatic facilities. The opportunity exists to partner with the MOE and community to maintain and open Opawa[19] and Bromley[20] school pools to the community.

Using the Belfast model as a foundation existing school pools can be kept open and viable and communities can have access to outdoor pools in their neighbourhood. Bromley School is outside and located within close proximity to existing pools. If Waltham is not viable to repair the case to support Opawa becomes more compelling. Council has provided advice, pool plant and equipment to keep the indoor pool at Canterbury Christian College open. Provisional results of an engineering inspection indicate this option may be again open to Council.

Council should review options to assist Canterbury Christian College in keeping their pool open and finalise any proposals through the 2013/2022 LTP process.

The viability of a similar proposition in New Brighton will be influenced by Council's decisions on the north east aquatic facility and its location. If Council chooses to build a recreation and sports centre to the west of the preferred location area then the need for an outdoor pool in New Brighton is more compelling.

### 2.3.7 Existing Council Aquatic Facilities

Current levels of service should be retained at Council Aquatic and Sport and Recreation Facilities at Pioneer, Jellie Park, Graham Condon, Halswell, Templeton, Belfast and Governors Bay.

Children's aqua play facilities should be installed at Jellie Park in order to meet community need by replacing the children's pool lost in the re development and provide a safe, entertaining, interactive shallow pool. Ideally children's facilities should be able to operate year round.

### 2.3.8 Other Facilities

Ongoing collaboration with neighbouring TLA's and other providers of aquatic facilities is now resulting in the establishment of a more efficient network of aquatic facilities and better access to swim education. This should continue.

Council's role in the Kiwiswim programme aimed at removing the barriers for primary school participation in swim education should be formalised into a level of service through the 2012/2021 long term plan process (80,000 subsidised swim lessons will be provided in 2012), with the majority of the cost met by third party stakeholders. Ideally this should be through a reprioritisation of existing resources.

### 2.3.9 Summary of Key Actions

The earthquakes of 2010 and 2011 have extensively damaged Council's network of aquatic facilities and will produce demographic change not anticipated by the Aquatic Facilities Plan 2006 or the Greater Christchurch Urban Development Strategy 2007.

[19] The location is represented on the facilities map as a "O" in section 2.4.5
[20] The location is represented on the facilities map as a "B" in section 2.4.5

As a result Council is making changes to its network of aquatic facilities and the way it works with other providers. The key directions that will be used for this project to guide us on facility placement and operations include:

- Retain current levels of service at Pioneer, Jellie Park, Graham Condon, Halswell, Templeton, Belfast and Governors Bay pools
- Build a central city aquatic facility as part of a Metro Sports Facility
- Build an aquatic facility in the north east of Christchurch
- Build a children's pool at Jellie Park
- Formalise Council support for the operation of the Sumner Pool as a level of service
- Explore the opportunity to partner with the MOE and the community to open targeted school pools to the community
- Formalise Council's role in the Kiwiswim programme as a level of service
- Follow Council's facilities rebuild process to establish the practicality of repair and useful economic life of Wharenui, Waltham and Lyttelton pools
- Conduct a review in 2017 on the need for an aquatic facility in the west/south-west
- Identify a site for an aquatic facility in the west/south-west ideally as part of a wider community facility planning exercise

## 2.4 CURRENT COUNCIL AQUATIC FACILITY NETWORK

The following information summarises the current Christchurch City Council main aquatic facilities still operating.

### 2.4.1 Jellie Park

Located at 295 Ilam Road, Burnside Christchurch, Jellie Park offers a full range of facilities including:

- Indoor pool complex including spa pool, sauna & steam room
- Fitness suite & studio
- Outdoor pool & hydroslides
- Outdoor family picnic area
- Free public WiFi access
- Recreation programmes and fitness classes
- SwimSmart aquatic programmes
- Learn to swim and swim squads

Key business and operational trends include:

- **Catchment Population within 5k radius:** 136,048
- **Annual visits:** 907,678
- **Fees per visits (income divided by no of visits):** $3.60
- **Secondary Spend per visit:** $0.01

### 2.4.2 Graham Condon Sports and Recreation Centre

Located off 3 Sisson Drive, Papanui Christchurch. The Graham Condon Sports and Recreation Centre offer a full range of programmes and activities:

- Learn to swim classes - from water babies to adults
- Lane swimming
- Fitness centre
- Group exercise & Aqua classes

The new complex features:

- A new eight-lane, ramped 25-metre indoor swimming pool
- A ramped spa pool
- A ramped learners' pool
- A separate toddlers' pool with wet deck and water toys
- An indoor sports hall
- A new fitness centre

The Sports Hall and existing Papanui High School Sports Hall are used by Papanui High School during school hours, but are available to community groups to hire evenings and weekends.

The new Sports Hall (Sports Hall 1) is marked for Basketball, Netball and has three volleyball courts. The existing Sports Hall (Sports Hall 2) is marked for Basketball and four Badminton courts. Key business and operational trends include:

- **Catchment Population within 5k radius:** 134,949
- **Annual visits:** 522,330
- **Fees per visits:** $2.43
- **Secondary Spend per visit:** $0.01

### 2.4.3 Pioneer

Pioneer is located off 75 Lyttelton Street, Somerfield and offers a wide variety of facilities including:

- Indoor 25m lane pool
- Wave pool including lazy river & bubble pits
- Spa, sauna & steam room
- Fitness centre & spin studio
- Indoor stadium, recreation programmes and fitness classes
- SwimSmart aquatic programmes

Other services include the Pioneer Early Learning Centre, Southern Centre multi-sensory experience, Plunge Café, Physio South, Canterbury Volleyball, stadium court hire and meeting room hire. Key business and operational trends include:

- **Catchment Population within 5k radius:** 99,914
- **Annual visits:** 1,120,770
- **Fees per visits:** $2.69
- **Secondary Spend per visit:** $0.01

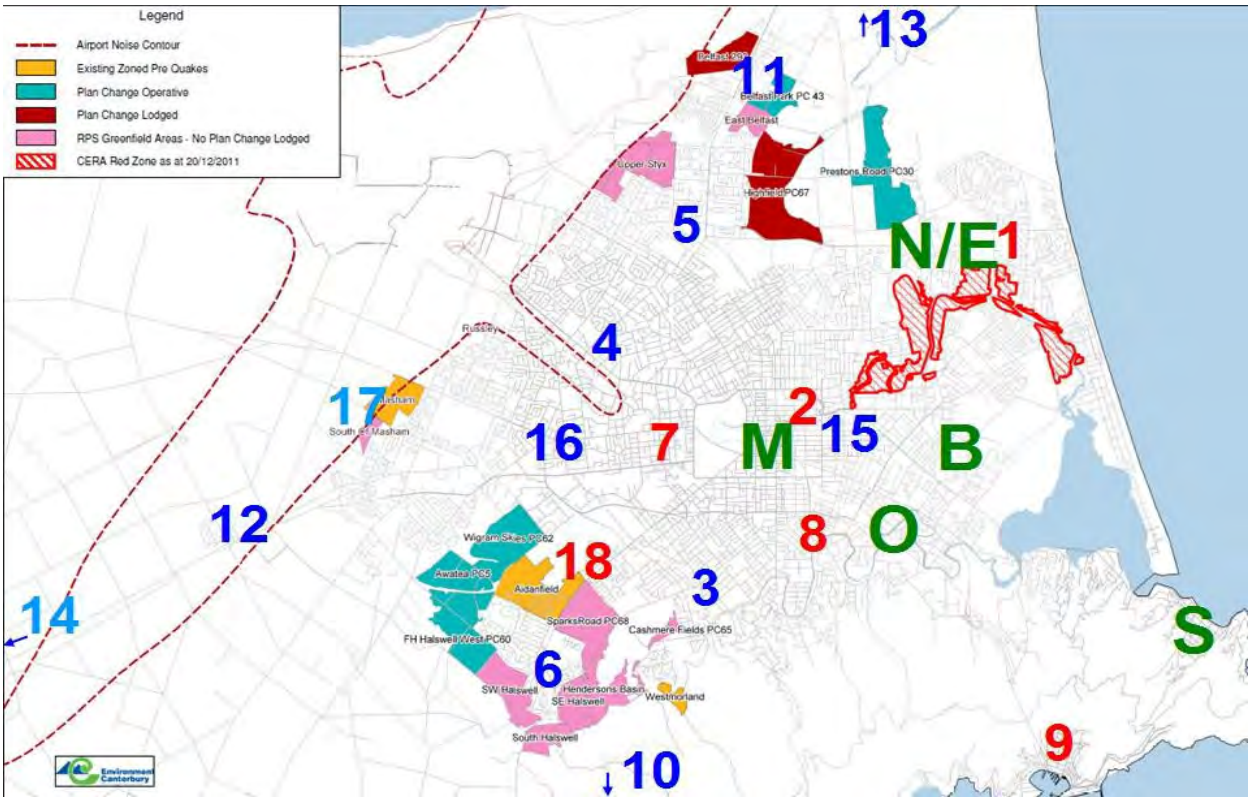
### 2.4.4 Other Council Swimming Pools

The desktop review of the Aquatic Plan proposes that the following local Council swimming pools remain open including:

- **Halswell:** Over 20 years old and structurally and mechanically operational.
- **Templeton:** Over 20 years old and structurally and mechanically operational.
- **Belfast:** Over 20 years old and structurally and mechanically operational.
- **Governors Bay:** Over 10 years old and pool tank is intact but buildings are structurally damaged and need replacement.

### 2.4.5 Current and Proposed Aquatic Facilities

The following diagram highlights the current and proposed aquatic facilities, red zones and planned new sub-divisions.




The map facility code is as follows:

| Map Code | Facility | Status | Map Code | Facility | Status |
|---|---|---|---|---|---|
| 1 | QEII | Closed | 13 | Kaiapoi Pool | Open |
| 2. | Centennial | Closed | 14 | Rollerston Pool | Under construction |
| 3. | Pioneer | Open | 15 | Aquagym | Open |
| 4. | Jellie Park | Open | 16 | Kings Sockburn | Open |
| 5. | Graham Condon | Open | 17 | Canterbury Swim School | Under construction |
| 6 | Halswell | Closed | 18 | Canterbury Christian Pool | Closed |
| 7. | Wharenui | Closed | M | Metro Sports Centre | Planned |
| 8. | Waltham | Closed | N/E | North East Pool | Planned |
| 9. | Lyttleton | Closed | B | Bromley School Pool | To be confirmed |
| 10 | Governors Bay | Open | 0 | Opawa School Pool | To be confirmed |
| 11 | Belfast | Open | S | Sumner Pool | To be confirmed |
| 12 | Templeton | Open | | | |

**Note: Red font indicates facility currently closed**

## 2.5 FUTURE AQUATIC FACILITY POPULATION CATCHMENT ESTIMATES

Based on the latest aquatic facility planning decisions SGL has noted as part of their assessment factors that two of the previously available (pre earthquake) high visit aquatic facilities will not reopen. These are:

- **QEII** – Travis Road New Brighton – 1,806,948 visits (2010 data) serving a catchment population within 5Kms of 74,866 people.

- **Centennial** – Armagh Street Central Christchurch – 340,403 visits (2010 data) serving a catchment population within 5kms of 160,393 people.

Closure of these 2 main aquatic facilities will see a loss of more than 2.240M visits (previously recorded visiting these centres) and this indicates the first main future aquatic facility service priority will be to develop new replacement facilities as well as encourage greater use of current aquatic facilities. Section 2.4 of this report highlights current and likely future CCC aquatic facility planning and the Christchurch City Council Aquatic Facilities Network (and likely population areas that are estimated to be serviced by these facilities) are summarised in the following table.

**Table 2.4**
**Future CCC Main Aquatic Facilities Summary**

| Facility/Suburb | Estimated Annual Visits 2012/13 | Estimated Primary Catchment Population within 5kms/(10kms) | Visits Per Primary Catchment Zone Population | Other information |
|---|---|---|---|---|
| **CURRENT MAIN COUNCIL AQUATIC FACILITIES** | | | | |
| **Jellie Park – Burnside** | 907,678 | 136,048 | 6.7 visits/population | • Proposed future development of children's aqua play. |
| **Graham Condon – Papanui** | 522,330 | 134,949 | 3.9 visits/population | • Closest current facility catchment to new eastern centre |
| **Pioneer – Somerfield** | 1,120,770 | 99,914 | 11.1 visits/population | • Closest southern area centre to the new eastern centre. |
| **TOTAL CURRENT AQUATIC FACILITIES** | **2,550,778 visits/year** | **370,911#** | **6.9 visits/population** | |
| **PROPOSED NEW AQUATIC FACILITIES** | | | | |
| **Metro Sports Centre** – (To be located off Balfour Terrace Central Christchurch). | Based on 6.9 visits/population 1.218M (5km radius) 594,000 up to 10km radius) visits which would see a total of up to 1,813M visits based on proposed major facility components, central location and larger drawing user catchment | Estimated 176,629 (0km to 5 km) Estimated 169,723 (5kms to 10Kms) Total 0 to 10kms = 346,352 total population | 6.9 visits/population 0Kms to 5Kms =1.218M<br><br>3.5 visits/population 5Kms to 10Kms =594,000 | • Based on Melbourne (MSAC) and Adelaide (SASSC) main city facilities primary catchment can increase to 10kms. |
| **North East Pool – Eastern Recreation & Sports Centre** – (Location to be decided) | Subject to final components and location likely to be in the order of 530,000 to 650,000 visits based on other facility trends and catchments | 77,431 (See suburbs Table 2.5 page 24 for estimated 5km area radius). | 6.9 visits/population | • Population catchment will depend on final location of facility.<br>• Final components will determine key catchment visits. |
| **TOTAL NEW AQUATIC FACILITIES** | **1.748M visits to 2.463M visits** | **346,352#** | **6.9 visits/population** | |

**Note: # Some population areas cross over.**

Based on the average visitation assumptions of 6.9 visits per population then the estimated attendances for the proposed two new facilities (subject to final components and location) and take up by primary catchments (0 to 5km radius) and secondary catchments (5km to 10km) they are likely to be in the range of:

- **Metro Sport Centre**: estimated between 1.218M to $1.823M annual visits.
- **Eastern Sport and Recreation Centre**: estimated between 530,000 to 650,000 annual visits.

The following graphics on the next two pages highlights the likely primary 5km catchment zones (Blue Circles) for each of the CCC main aquatic facilities (including the Metro Sport Centre). The maps do not locate the proposed ER & S Centre at this stage as no decision has been made on location.

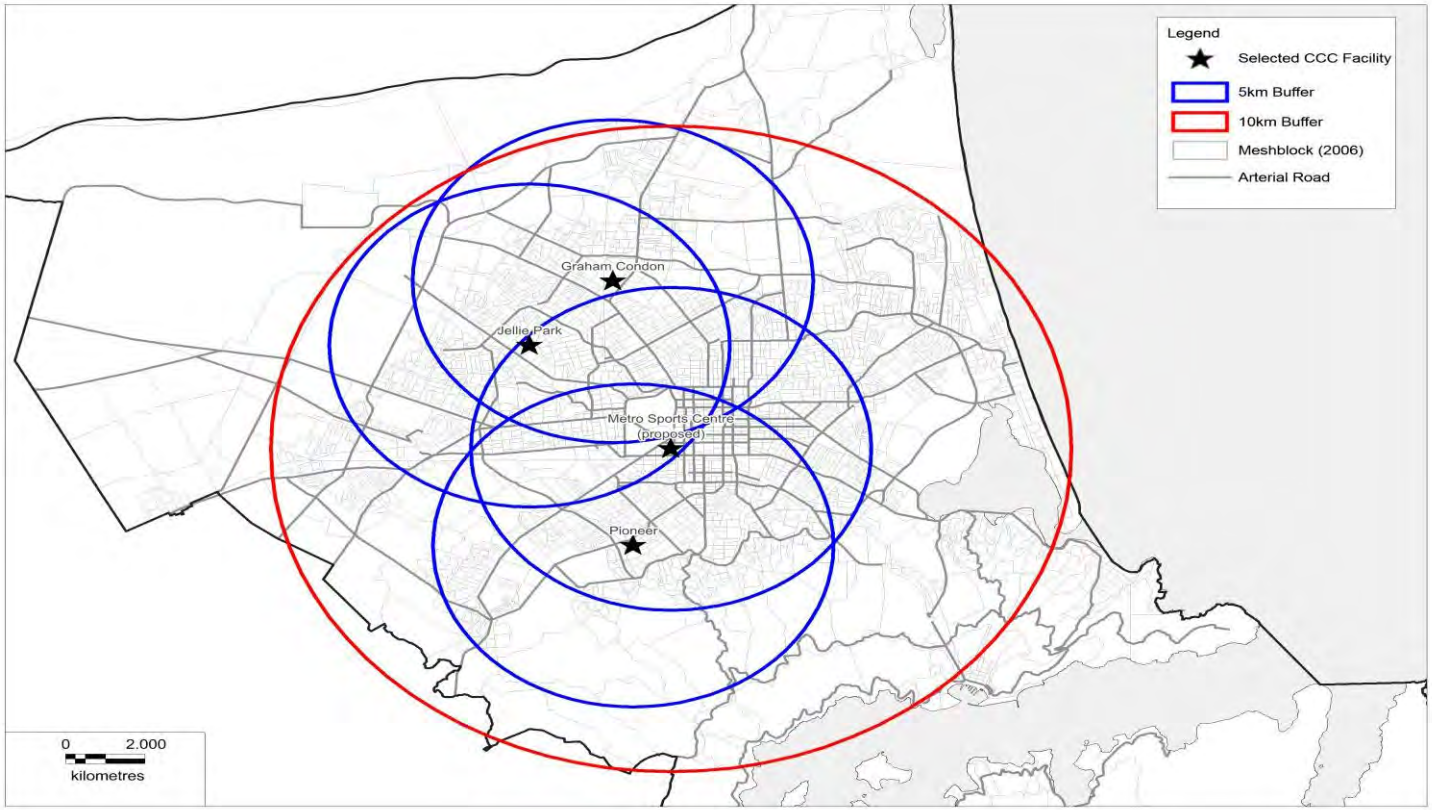
It is clear from viewing the primary catchment areas of all existing operational aquatic facilities with the proposed new Metro Sports Centre that there is still a significant facility gap in the north-east area of Christchurch City.

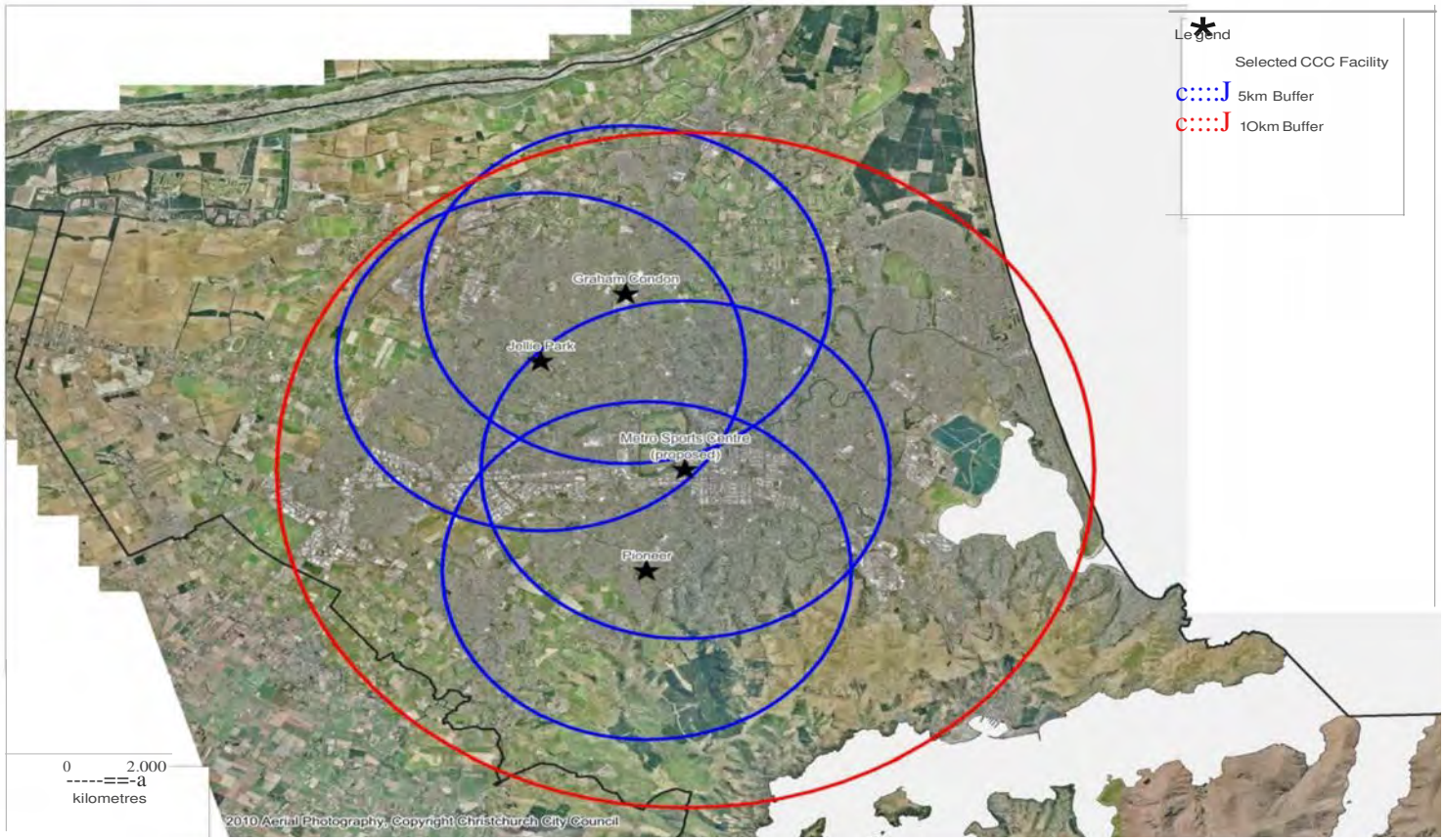
We have also noted on the maps the estimated extra 5km to 10km secondary user catchment zone (Listed in the Red Circle) for the Metro Sport Centre (as highlighted in table 2.4 on the previous page).

This clearly shows with a larger catchment zone that this facility will attract some of the north east area residents to use this centre based on the usages trends in other areas that see major facilities with a broad range of activity areas and centrally located, able to attract larger user catchments than district and local facilities.

The red circle clearly indicates that the new Metro Sports Centre primary and secondary user catchments will cover the total Christchurch City Council area. The future strategy of a range of local aquatic facilities supported by the city wide Metro Sports Centre is supported by SGL and the catchment analysis indicates under such a strategy that there is still capacity for a new local/district centre in the north east area.

## Christchurch City Council Main Aquatic Facilities 5Km and 10Km Population Catchment Radius




Legend
Selected CCC Facility
5km Buffer
10km Buffer
Graham Condon
Jellie Park
Metro Sports Centre (proposed)
Pioneer
0 2.000
kilometres
2010 Aerial Photography, Copyright Christchurch City Council

## 2.6 NEW ER & S CENTRE PROJECTED CATCHMENT POPULATION

The study findings indicate there is a significant gap in current and future aquatic facility provision with the closure of both QE11 and Centennial Pool.

The provision of a new city wide aquatic and leisure facility in a new central location (Metro Sport Centre) is estimated to service a large number of these lost visits with an estimated primary catchment zone of (0 to 5km) of just under 176,000 people and a secondary catchment zone (5km to 10kms) of 170,000 people.

People living in the primary catchment zone of the new Metro Sport Centre are expected to visit the centre on average 6.9 visits/year whilst people living in the secondary catchment zone are expected to have a lower visitation rate of around 3.5 visits/year. Based on these assumptions (developed from average visitation trends at all Council aquatic facilities pre the earthquake) then the combined area visitation results for the new facility are expected to be in the order of 1.8M to 1.850M visits/year.

If this new centre is developed and links to the existing aquatic leisure centres then the major future facility provision gap is in the north-east area where there is a significant population with no local/district facility to use.

The following table provides an overview of the suburban areas and associated population estimates likely to form the primary catchment zone (5kms) for the proposed new Eastern Sport and Recreation Centre (ER&S Centre) subject to its final location in the north east area.

**Table 2.5**
**Projected Population Primary Catchment Zone for the Proposed ER&S Centre**

| Suburb | 2013 Estimated Population | Suburb | 2013 Estimated Population |
|---|---|---|---|
| South Brighton | 2,746 | Linwood East | 2,063 |
| New Brighton | 2,625 | Linwood North | 2,922 |
| Rawhitti | 4,020 | Chisnall | 2,848 |
| North Beach | 5,056 | Avonside | 1,856 |
| Waimairi Beach | 2,837 | Dallington | 1,984 |
| Parklands | 5,169 | Burwood | 775 |
| Travis Wetlands | 4,765 | Shirley East | 3,724 |
| Travis | 2,078 | Marshland | 4,658 |
| Avondale | 2,706 | Shirley West | 3,842 |
| Aranui | 4,407 | Woolston West | 3,606 |
| Bexley | 2,584 | Ferry Mead | 3,235 |
| Bromley | 3,340 | Woolston South | 2,585 |
| **Subtotal Population** | **42,333** | **Subtotal Population** | **35,089** |
| **Total Catchment Population** | **77,431** | | |

**Note: Population estimates based on 2013 estimates for resident population projections by Mesh block for Greater Christchurch (CCC Monitoring and Research Team 2nd March 2012).**

The review indicates there are 24 suburbs/part suburbs located within an approximate 5km radius of the east coast of the city. Based on the estimated 2013 population by suburb the total likely ER and S Centre primary catchment population is estimated at 77,431 people.

# 3 NEW BRIGHTON WATER PARK PROJECT OVERVIEW

## 3.1 INTRODUCTION

The following section provides a summary of the two proposals put forward to Christchurch City Council for the development of aquatic facilities in response to the New Brighton Master Plan. Please note that this section summarises the proposals and detailed assessment is undertaken for these two options plus a range of other aquatic development options (required to be reviewed as part of the project brief) in section 5 of this report.

## 3.2 NEW BRIGHTON WATERPARK PROPOSAL

As part of the Christchurch revitalisation and Major Facilities Rebuild Programme the Christchurch City Council provided a funding allocation of approximately $37M for the design and construction of an Eastern Recreation and Sports Centre in the eastern suburbs of Christchurch. This was made up of an allocation of $30.5M for the base facilities and $6.5M for water play and waterslides (based on contribution approved from the Canterbury Earthquake Appeal Trust Fund).

Two members of the Burwood Pegasus Community Board believed that the proposed facility should assist with revitalising the commercial centre of New Brighton. To achieve this the facility needed to be more than a "community " leisure centre and more in line with an aquatic/waterpark. A broad concept was then developed using a cut and paste option from LHT (A design company) and promoted as the option for a water park in New Brighton.

The two members approached Sport and Venues NZ Ltd to assist with designing an aquatic centre/waterpark that would achieve the identified objectives. A broad concept was developed that included the base community aquatic facilities utilising a lightweight structure to enclose them from the elements. The construction savings proposed by utilising this light-weight structure were then allocated to fund a range of waterpark features plus also propose some commercial investment for additional waterpark features.

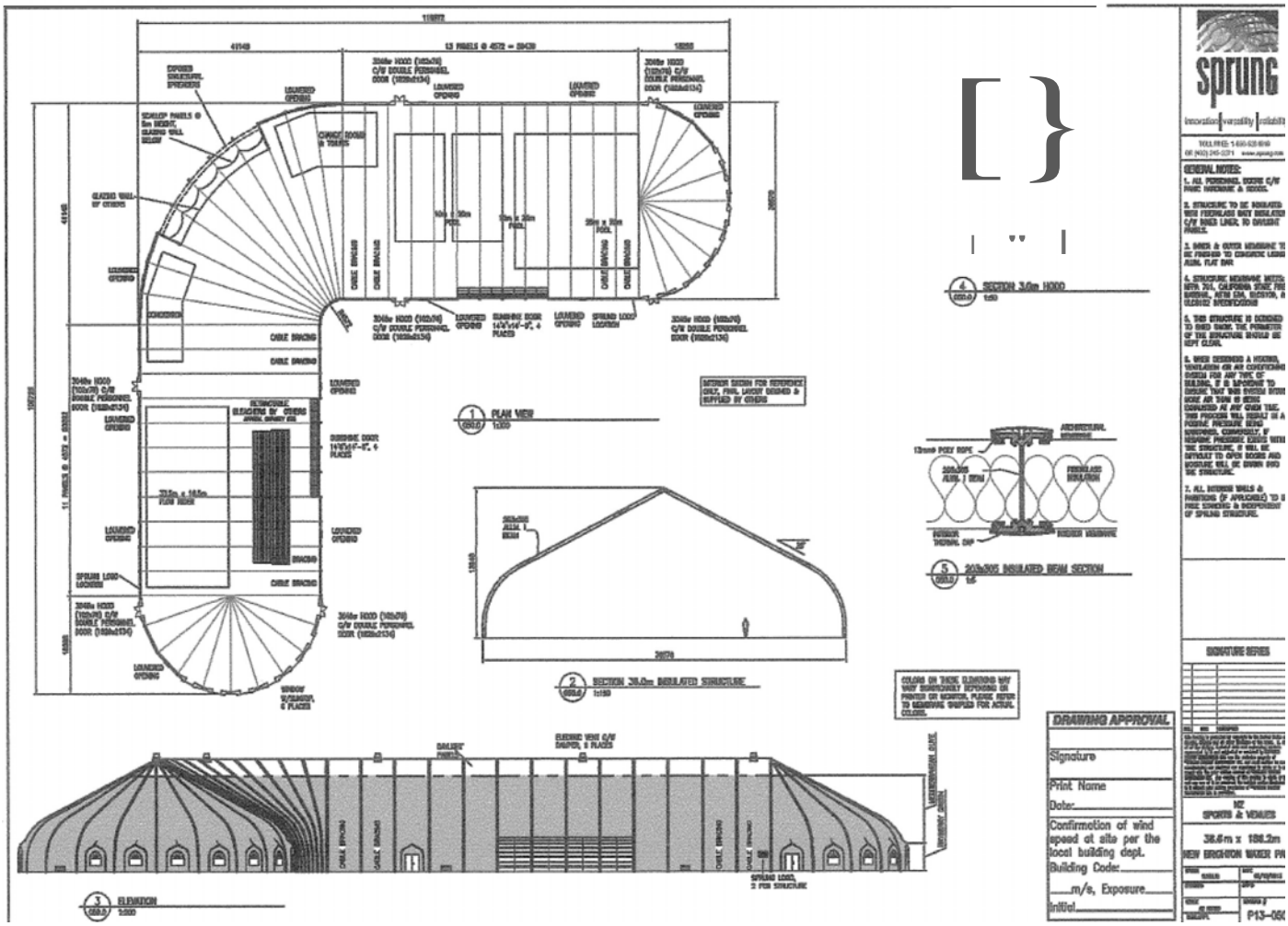
A basic concept drawing was forwarded and from this the project team have identified the proposed aquatic/waterpark building looks to cover an area of approximately 120m x 90m plus buffer zones which totals between 11,000m² and 12,000m² excluding car parking, plant rooms and service areas. The indoor facility was originally designed with a "fairground look". The facility components based on the schematic drawing include the following indoor areas:

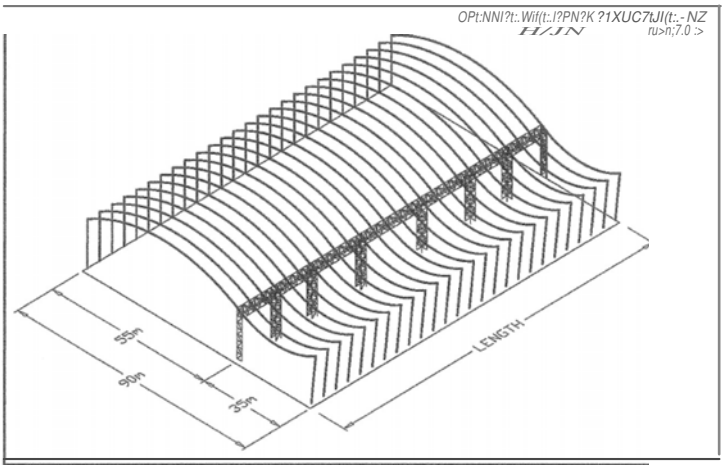
- 25m x 25m indoor pool
- 1x learn to swim pool 25m x 12.5m and 1 x rise and fall floor pool 25m x 12.5m
- Outdoor spas
- Gymnasium
- Foyer/Reception/Café
- Change rooms

The waterpark components include 3 to 4 signature water play rides including:

- A double flowrider static wave
- 175OTB Aquaplay.
- Super Bowl
- Rattler
- Boomerango
- River lagoon and beach

The following indicative layout plan details the proposed main building area and the tension membrane product originally proposed was changed to include a covering structure constructed from polycarbonate material with part retractable roof and a glass retractable front wall, potentially facing the Pacific Ocean (if a suitable coastal site was available).



The following photographs have been supplied by SGL and Whitewater West to provide a visual guide to some of the main water park feature rides proposed:

**Boomerango and Speed Bowl**
**Kalahari Resort Wisconsin Dells USA (Photo SGL 1999)**

**Double Flowrider**
**Melbourne Sports and Aquatic Centre (Photo SGL 2011)**

**Double Flowrider**
**Melbourne Sports and Aquatic Centre (Photo SGL 2011)**


**Indoor 1750 Whitewater West Play Structure**
**(Photo Whitewater West)**


**Outdoor 1750 Whitewater West Play Structure**
**(Photo Whitewater West)**

### 3.2.1 Projected Waterpark Capital Budget Estimate

The proposal identified a capital expenditure estimate for the facility of $34.7M based on the following components plus a further $3M for a double flowrider (possibly funded from commercial operator).

**Table 3.1**
**Waterpark Proposal Preliminary Capital Cost Estimate**

| Component | Estimated Cost |
|---|---|
| Sprung Building structure and indoor pools | $10.0M |
| Gym, change, entry | $1.8M |
| Water Park | $8.4M |
| Retractable roof and walls | $10.0M |
| Outdoor Spas | $3.0M |
| Landscaping | $1.5M |
| **Total Estimated Cost (excluding flowrider)** | **$34.7M** |
| Double flowrider (3rd party) | $3.0M |

**Note: Allowances not identified for land acquisition, car parking, access roads, plant rooms, and services connection, professional fees**

SGL has reviewed the preliminary schematic documents submitted on the water park and its associated capital budget. The documentation and plans are very limited in detail and are certainly not developed enough for detailed assessment.

It does provide a broad concept and order of cost that we have reviewed against current industry rates and we note that the capital costs detailed in the table above are significantly understated when the total development cost is considered. We have documented and summarised these issues in greater detail section 5.2 of this report.

### 3.2.2 Proposed Waterpark Operations

The proposal indicates that the facility is expected to attract 900,000 visits per annum with the anticipated income per annum estimated at $7.4M based on:

- 600,000 customers paying $10/visit - $6.000M
- 300,000 customers paying $3/visit - $1.200M
- Rental $0.200M

  **Total Income $7.400M**

The anticipated operating expenditure for the facility is $3.3M, which would return an anticipated operating surplus of $4.2M.

The proposal offers no documentation as to the assumptions for attendances and what is the customer make up of Christchurch City Council residents, regional and interisland visitors and international visitors.

Contact with the project proponents who have indicated they have not done any detailed user catchment research or modelling and have developed catchment numbers based on waterparks they have seen on overseas visits. They have also indicated that a larger number of people who used to visit QE11 for leisure and fun water activities may be attracted to this facility. SGL has reviewed the proposed attendance data and assess this against city wide aquatic facility attendances and the various options proposed for consideration in section 5.2 and 5.3 of this report.

## 3.3 ALTERNATE MASTER PLAN PROJECT

The New Brighton Business and Landowners Association (NBBLA) using funding from Eastern Vision engaged architects Align and Pivnice Ltd to develop an alternate master plan for the New Brighton area.

This is a very preliminary stage document and provides an alternative to a single, 'blockbuster' Waterpark concept through proposing instead a 'Village in a Waterpark'.

This idea reflects the position of the New Brighton commercial centre between the sea and the river, and suggests a range of smaller additional facilities in close proximity to the centre.

These might include:

- A coastal pathway and boardwalk.
- A white water facility
- A saltwater lap pool and leisure pools, located on the foreshore between the surf club and whale pool.

These facilities are intended to complement the proposed Eastern Recreation and Sporting (ER & S Centre) Facility, which may be built elsewhere.

The identified vision for the proposed facility was to create the following:

*A product that on terms of appeal to its target market, sets itself above similar offerings and provides a perfect way for visitors to unwind, relax and rejuvenate*.

The primary targets for the facility is international and domestic visitors to and within New Zealand. The secondary market is residents to New Brighton and Christchurch and any day visitors to Christchurch.

The proposal includes the development of a single storey facility that will house the pool reception, waiting area, retail, male/female and family change rooms and amenities and the administration area.

It would potentially include the redevelopment of the existing surf club buildings.

It includes three saltwater pools with a temperature range of 38-40 degrees along with the main pool buildings.

The pools will range in size from 36m² to 58m². These pools are proposed as relocatable facilities that could be moved elsewhere in the future if desired, either as part of the proposed waterpark concept or in the Water Park/ER&S Centre combined facility.

The schematic layout plan is listed on the following page.

# New Brighton Salt Water Pools site layout


JOSEPH & ASSOCIATES LTD



The anticipated cost for the project was estimated to be in the range of $3M to $4M depending on the final components and linkage with existing facilities.

At this stage the aquatic options are concepts only and the proponents have indicated that no feasibility work has been undertaken to identify final sites, detailed layout plans or operational income and expenditure estimates.

The proposal identifies the need for more detailed work to be undertaken to determine the feasibility of the options presented and this would allow for detailed operating and capital cost budgets to be developed.

# 4 SUCCESSFUL WATER PARKS AND AQUATIC WATER PLAY FACILITIES

## 4.1 INDUSTRY OVERVIEW

This section provides an overview on the development of waterparks and water play facilities to assist in identifying key trends that could impact on the range of developments assessed in section 5 of the report.

The operation of aquatic centres and swimming pools is a substantial industry throughout New Zealand and Australia. The industry attracts large numbers of visitors to a significant number of facilities dispersed locally as well as facilities of larger size and strategically placed locations to service district, sub regional and regional locations.

Christchurch City Council is one of the country's leading local government areas in the provision and operation of aquatic facilities. Pre the earthquake period in 2010 Councils aquatic services involved some 11 facilities that combined attracted more than 4.7m visits.

Based on an estimated area population for the city of 376,700 people this saw an aquatic facilities visitation rate of 12.4 visits per head of population. This result is one of the highest visits per head of population to aquatic facilities noted in our 25 years industry experience and sets the starting point for understanding the potential and capacity to now consider demand for new aquatic type facilities.

Section 2.5 of this report summarises the current and proposed new aquatic leisure facilities that are again estimated to take visitation levels back up to 4.7M to 5M annual visits following closure of a number of facilities.

## 4.2 WATERPARKS AND WATER PLAY INDUSTRY TRENDS

The water park and water play facilities trend commenced around the late 1970s when traditional UK and USA swimming facilities started to add leisure and free form pools for fun and recreation to the traditional lap swimming and diving pools most facilities offered.

What has become known as "**The LEISURISATION**" of traditional swimming pools worked well in large population areas and by the mid 1980s there were many examples of indoor and outdoor leisure and wave pools, waterslides and the emergence of water play equipment that then lead to water play structures.

The World Waterpark Association website indicates "from a water park perspective that the first major water park is reputed to be Wet 'n Wild which opened in Orlando Florida in 1977". The operator of this park was the founder of Sea World who took the successful amusement park concept he developed in 1964 and added it to a water facilities theme in a warm climate area.

Other parks began springing up around the USA and huge, concrete slide structures were the norm back then. The industry became more focused in 1981 when the World Waterpark Association was formed. They brought together the **wave pool** from Europe, **the leisure river** and **speed slide** from the Asia-Pacific region of the world and the **waterslide** from California—among other innovations—to create what is known today as the waterpark industry.

Today, waterparks are being built all over the world. They come in a multitude of shapes and sizes, from small aquatics centres that have a few waterpark features—such as a waterslide or leisure river—to city-owned facilities that rival some of today's major parks, as well as indoor waterpark hotels/resorts.

The proposed waterpark for New Brighton for example would be regarded in the lower level standard facilities at less than 10,000m² development (see section 5.2 for assessment).

A growing number of other industries are also joining in the waterpark trend. Hotels, campgrounds, ski resorts, cruise ships and amusement parks are now also where you will find water play and water fun as they provide a significant point of attraction and point of difference when people choose places to visit or stay.

The majority of development of such facilities has occurred in warmer climate areas with large population catchments close to major highways, airports, major accommodation options and main transport routes. Where water parks have been developed indoors it has been for climatic conditions to minimise cold weather and wind impacts to users. These centres usually are much smaller developments and also have to meet the higher operating costs of heating the indoor areas.

The industry trends indicate limited water park and water play development has occurred in New Zealand and Australia and this is primarily noted due to the low population catchments and colder climatic conditions in these countries. From a commercial investment point of view they present higher development risk compared to the continually expanding Northern Hemisphere and Asian market places that have high temperatures all year and large population areas.

To assist the project in identifying key development, viability and operational trends we have looked at available industry data in the largest development market being the USA and the fastest growing market, which is Asia and then also looked at known industry trends for New Zealand and Australia.

### 4.2.1 USA Water Parks Review

The latest "Hotel and Leisure Advisors (HL & A)" Survey conducted in 2012 indicated for example there were 796 waterparks in the USA with 16 of these opening in 2012 and a further 21 under construction and due to open in 2013. The World Waterpark Association (WWA) has estimated there were approx. 85 million visits to waterparks in 2012, which was up 3 million visits (2011) and 6 million visits (2010).

#### 4.2.1.1 Types of Water Parks

Both the World Waterpark Association and HL & A have attempted to try and categorise water parks into facility categories and these notionally include:

- **Indoor Waterpark Resort:** Is a lodging establishment containing an aquatic facility with a minimum of 10,000 square feet (929m²) of indoor waterpark space inclusive of slides, rides, rivers, pools and tubes. It can be further categorised by either having accommodation attached (see next listing) which would be seen as a Hotel Indoor Waterpark Resort or close by to accommodation so bookings are linked.

- **Indoor Water Park Destination Resort:** is a lodging (accommodation) hotel that also contains an aquatic facility with a minimum of 10,000 square feet. (929m²) to 30,000 square feet+ (2797m²+) of indoor waterpark space such as slides, rivers, pools and tubes.

Some resorts may not have accommodation onsite but are linked to an accommodation outlet i.e. SeaWorld Resort Gold Coast. An example of an indoor waterpark destination resort is the Kalahari Centre, photographed below:

**Kalahari Centre Indoor/Outdoor Waterpark Resort**
**Wisconsin Dells USA**

- **Outdoor Waterpark Resort:** is a lodging establishment containing outdoor aquatic facilities with at least three or more waterpark elements such as slides, water play, splash-pads, lazy rivers or wave pools. These facilities will normally be used by hotel guests and normally are located in warmer climates or also have indoor facilities for winter, autumn and spring use.

**Kalahari Centre Indoor/Outdoor Waterpark Resort**
**Wisconsin Dells USA**

- **Standalone Indoor Waterpark:** is an aquatic facility with a minimum of 10,000 square feet (929m²) of indoor waterpark space not established to a lodging establishment.

- **Standalone Outdoor Waterpark:** is an aquatic facility containing outdoor aquatic facilities with at least three or more waterpark elements such as slides, water play, splash-pads, lazy rivers or wave pools.

### 4.2.1.2 Developers and Owners of USA Water Parks Overview

Based on the facility classification definitions listed in section 4.2.1.1 the following table on the next page indicates the ownership of USA Waterparks in 2012.

**Table 4.1**
**USA Waterparks Inventory by Category/Owner**

| Type of Waterpark | Municipal Owner | Private Company Owner | Franchise Owner | Independent Owner | Total |
|---|---|---|---|---|---|
| Outdoor Water Park | 307 | 254 | 0 | 0 | 561 |
| Indoor Waterpark | 43 | 5 | 0 | 0 | 48 |
| Indoor Water Park Resort | 0 | 0 | 47 | 85 | 132 |
| Indoor/Outdoor Water Park Resorts | 0 | 0 | 19 | 36 | 55 |
| Total | 350 | 259 | 66 | 121 | 796 |

**Source: Hotel & Leisure Advisors, LLC, April 2013.**

The review indicates that from the 796 waterparks in the survey that 561 (70%) were outdoor waterparks followed by 132 (16.5%) being Indoor Waterpark Resorts whilst 55 (7%) were Indoor/Outdoor Waterpark Resorts and 48 (6.5%) were indoor waterparks.

Research indicates that the greatest numbers of waterparks are outdoors due to the large amount of site areas required for the specialist activity areas and equipment plus the high cost to develop overhead shelter structures and need to heat internally the air and water within these structures.

These results also indicate that 609 (76.5%) Waterparks were not linked to accommodation outlets whilst 187 (23.5%) were. A total of 350 waterpark facilities were developed and owned by municipal authorities with the majority of these being outdoor waterparks linked to indoor swimming facilities.

The larger resort facilities were developed more by private, franchise and independent owners and more than 187 of these were linked to accommodation developments with an estimated 6,727 rooms (average 350 rooms/resort)

### 4.2.1.3 Location of USA Waterparks

The waterparks were located in areas where there was significant high monthly average temperatures with the majority of outdoor waterparks being in areas that recorded 25 Celsius or greater. The provision of waterparks by type/area of development is detailed as follows.

**Table 4.2**
**USA Waterparks Inventory by Category and Regional Location**

| Type of Waterpark | Northeast Region | Midwest Region | South Region | West Region | Total |
|---|---|---|---|---|---|
| Outdoor Water Park | 64 | 199 | 203 | 95 | 561 |
| Indoor Waterpark | 1 | 22 | 10 | 15 | 48 |
| Indoor Water Park Resort | 13 | 100 | 10 | 9 | 132 |
| Indoor/Outdoor Water Park Resorts | 3 | 12 | 25 | 15 | 55 |
| Total | 81 | 333 | 248 | 129 | 796 |

**Source: Hotel & Leisure Advisors, LLC, April 2013.**

The review of USA 2012 waterpark locations saw the majority of the waterparks located in the warmer southern region (333 facilities/42% of all facilities) and Midwest region (248 facilities/31% of all facilities). These two regions saw 402 outdoor waterparks located within these two areas.

Industry sources indicate that a main key to successful waterparks is choosing locations that encourage people to use water regularly and the industry uses as a development guide a guaranteed temperature of 25 degrees or greater, as a key success factor (to allow people to say for long hours near or in water).

**This has lead to the industry trend of indicating that areas that have temperatures lower than the 25 degrees Celsius need to locate main waterpark activities indoors. This is a critical success factor when considering the viability of a waterpark in Christchurch as a review of average mean temperatures per month indicates this is not achievable in the Christchurch area and therefore any waterpark facility will need to be indoors as well as able to meet the constraints of being roofed and extra operating costs to heat the water and pool hall air.**

Locating waterparks with accommodation outlets and/or in high visitation tourist resorts with significant accommodation supply is a key to reducing the business risk as it opens up the market catchment to not only local people but also people staying and visiting the area and having a higher daily spend in the area.

#### 4.2.1.4 Top Ten USA Waterparks

The top ten waterparks in the USA in 2011 as identified by the TEA 2011 Theme Index Global Attractions Attendance Report are listed in table 4.3 on the next page.

**Table 4.3**
**Top Ten USA Waterparks 2010 and 2011**

| Park/Location | 2011 Attendance | 2010 Attendance |
|---|---|---|
| 1. Typhon Lagoon at Disney World – Orlando, Florida | 2,058,000 | 2,038,000 |
| 2. Blizzard Beach at Disney World – Orlando Florida | 1,891,000 | 1,872,000 |
| 3. Aquatica – Orlando Florida | 1,500,000 | 1,500,000 |
| 4. Wet and Wild - Orlando Florida | 1,223,000 | 1,223,000 |
| 5. Schlitterbahn – New Braunfels Texas | 980,000 | 960,000 |
| 6. Water Country USA – Williamsburg Virginia | 723,000 | 784,000 |
| 7. Adventure Island – Tampa Florida | 644,000 | 626,000 |
| 8. Noahs Ark – Wisconsin Dells Wisconsin | 643,000 | 637,000 |
| 9. Hyland Hills Water World – Denver Colorado | 559,000 | 545,000 |
| 10. Schlitterbahn - Galveston Texas | 535,000 | 530,000 |

**Source: 2011 Theme Index – Global Attractions Attendance Report - TEA.**

The next 11 to 20 most used facilities ranged from a high of 500,000 visits in 2011 at Six Flags White Water Georgia to 367,000 visits at Water Country New Hampshire.

### 4.2.2 Asian Waterpark Development Trends

The Asian Attractions industry is noted as the fastest growing industry region and the majority of development due to their high population areas, improved economic results and significant investment in integrated resort development.

Due to many Asian countries located in high daily temperature areas the development of water related attractions is the key theme for many parks.

In 2011 there were 105.1 million attending theme and amusement parks in Asia according to the Global Attractions Attendance Report 2011 (published by Themed Entertainment Association (TEA) and the Economics Practice at AECOM.

This report also listed the top 10 Waterparks in Asia and these are summarised in table 4.4.

**Table 4.4**
**Top Ten Asian Waterparks 2010 and 2011**

| Park/Location | 2011 Attendance | 2010 Attendance |
|---|---|---|
| 1. Chimelong Waterpark - Guangzhou China | 1,900,000 | 1,700,000 |
| 2. Ocean Park Water Adventure - Jakarta Indonesia | 1,730,000 | 1,700,000 |
| 3. Ocean World – Gangwon-Do, South Korea | 1,726,000 | 1,376,000 |
| 4. Caribbean Bay- Gyeonggi – Do, South Korea | 1,497,000 | 1,736,000 |
| 5. Wet and Wild - Gold Coast Australia | 1,200,000 | 1,100,000 |
| 6. Sunway Lagoon – Kuala Lumpur, Malaysia | 1,040,000 | 1,000,000 |
| 7. Alantis Water Adventure – Jakarta Indonesia | 950,000 | 850,000 |
| 8. The Jungle Water Adventure – Bogor, West Java Indonesia | 871,000 | 875,000 |
| 9. Summerland - Tokyo Japan | 850,000 | 925,000 |
| 10. Water Kingdom – Mumbai India | 800,000 | 760,000 |

**Source: 2011 Theme Index – Global Attractions Attendance Report - TEA.**

The top 10 Asian waterparks have higher annual attendances than USA Waterparks due to higher density of population and more consistent higher temperatures, which attract users all year round.

### 4.2.3 New Zealand and Australian Waterpark and Water Play Facility Trends

Due to low population density and lower Southern Hemisphere temperatures the water park industry in New Zealand and Australia is very undeveloped with limited facilities and locations. There are no major waterparks in New Zealand and only one destination waterpark in Australia (Wet and Wild Gold Coast) though Wet and Wild Western Sydney ($120M investment park) is now under construction and due to open in 2014.

Wet and Wild Gold Coast is the 5th most used waterpark in the Asian region with 1.2m annual visits. It is located on approximately a 20,000m² waterpark site with adjoining 15,000m² of car parking. This sees an area of approximately 35,000m² or 3.5 hectares. Annual attendances range from 2,000 a day in the colder months to 10,000/day on hottest days.

This section of the report provides a summary of SGL's historical overview of waterpark and water play development created from a range of projects) to assist in considering the viability and suitability of the New Brighton Waterpark.

The New Zealand and Australian waterpark industry from our companies 25 years industry experience has started at small investment developments mainly with waterslide and water play installations with the majority of these being located at local council facilities or public parks.

The Industry has gone through a number of development phases and trends with the first stages starting with a range of commercial developers and some Councils installing waterslides and some limited play equipment in the 1970s and 1980s.

### 4.2.4 Early Waterslide Development

The first waterslides were usually open-air outdoor single slides made for individual riders. The slide was either entered from a tower or from a raised in-ground mound.

The rider was aided in their ride by running water, which was pumped to the top of the slide and propelled by gravity to a plunge pool below. Most dropped into a plunge pool.

The early slide designs saw the rider exit the slide above the waterline and drop into the plunge pool. Over the years and by the 1980s most slide plunge pools had the slide protruding into the water so the rider was slowed by the back flow of water as it fell from the slide into the plunge pool.

In the 1970s and 1980s there was a significant development of single waterslides at a large number of local council aquatic centres. The majority of these were outdoor and open flumed. In New Zealand these included many local swimming pools that had slides at places such as Invercargill, Dunedin, Christchurch and Blenheim. Waterslides were also developed in a number of North Island pools from Wellington, Taupo, Rotorua, Tauranga, Hamilton, and Auckland.

The industry also saw a number of commercial operators develop water slides at a privately owned sites (where there were no pools). Due to the high numbers of people being attracted to this new thrill ride many commercial operators did commercially very well out of such developments through to mid 1990s.

### 4.2.5 Multiple Slides and Covered Flumes

The next stage of industry development saw the option to develop multiple slide rides of different size, height, speed and skill off the one tower. As speed and adventure became important to users the covered flume was introduced to allow riders to move around the slide at high speed.
The covered in flume allowed manufacturers to develop slides at much higher angles, creating greater speed and change in direction.

The covered in flumes also allowed development of thrill rides such as "The black hole" as well as introducing lighting and sound effects.

By the late 1980s many single slide operations had ceased, as users became bored with the one slide configuration. Many commercial operators sold out of their business or sold slides to Councils and Aquatic Centres as the aged infrastructure needed replacing.

### 4.2.6 The Waterpark Phase

The need to keep people amused for longer time lead to the evolution of the waterpark or theme leisure water area. In the 1980s there was an explosion of new facilities (particularly in the USA and Europe where there were large populations).

Aquatic Centres started to add leisure water as part of their water areas and this also saw the development of the first indoor waterslides.

Australia for example due to its broad population spread only saw limited development of Waterparks. Wet n Wild at the Gold Coast and Water Theme Parks in Perth and Adelaide (long summers and hot weather) were developed in the 1980s. There were also smaller waterparks developed along the east coast at many holiday destinations.

In the 1980s a range of theme parks such Sea World (Gold Coast), Wonderland (Sydney) and Dream World (Gold Coast) added waterpark components to attract people to stay longer in their parks.

### 4.2.7 Splash Pads and Water Play Equipment

In the late 1980s and 1990s there was significant demand to take static water areas into a more water playground theme. This saw a number of wave pools built as part of multi-purpose leisure centres as well as the introduction of:

- Rapid Rivers
- Waterslides
- Water play equipment
- Food and beverage services pool side
- Waterslides

Most facilities developed in the 1990s saw designers build free form pools and then add somewhat ad hoc basic play equipment and sprays. This approach has now been superseded by play and water splash parks that maximise play and fun and then add water zones appropriate to the size and scale of development and user.

### 4.2.8 The Adventure Water Ride Phase

In the 1980s and 1990s there was a major increase in different ranges of waterslide products and design. The open and closed individual rider slides were improved for speed and thrill. Over time, a number of new products were also developed with more efficient and different size rider flumes that allowed different ride experiences for inflatables, multi-person tubes and multi-person rafts.

To enable higher speeds to run these rides tower height was increased from the standard 8 to 10 metres to 12 metres and some even went to 15 metres high. The flumes were increased in diameter from 800 mm (individual rider width) to 1200 mm for inflatables and 1322 mm for multi-person inflatables and rafts. The extra width and height in the slides allowed designers to introduce high speed and high-banked radius turns therefore increasing variation in rides.

In the 1990s and through the 2000s these changes lead to truly a diverse mix of thrill and adventure rides where people can ride together in rafts and inflatables. Today many derivatives of the original waterslide concept have evolved to now include:

- Whirlpool tubs: Riders in rafts/inflatables can go from slides to swirling whirlpools and then back into slides.
- Wave/Flow riders: Riders can use small surfboards to ride a shallow wave and then be shot out into a slide to a lazy river.
- Speed slides: Multiple steep slides side by side that allow riders to race each other.
- Adventure rides: Specialist rides such as
  - **MasterBlaster:** Rollercoaster inflatable ride that uses water and conveyor belts to speed participants up and down a wet rollercoaster.
  - **Tornado:** Inflatable ride that sees multi-person inflatable drop 90 degrees into a closed waterslide and then come out into a large cylinder that shoots riders around 240 degrees and then out to a plunge pool.
  - **Speed Bowl:** Individual and inflatable waterslide that sees riders emerge from a waterslide into a large speed bowl. Riders slide around the bowl and eventually drop through a central hole to a plunge pool.
  - **Cyclone Racer:** Covered in multi flume that twists around each other and allow riders to race each other through 240 degrees use of the flume (in a black hole so riders do not know where they are).

With the advent of now more than 1,000 waterparks throughout the world there are new ride products being developed all the time. As parks compete against each other for business there is ongoing retrofitting of rides and slides happening every major season.

### 4.2.9 Examples of Australian and New Zealand Waterparks and Water play Facilities

SGL have completed an industry research review on current or planned Waterparks and signature Water Play facilities in New Zealand and Australia. This has included web-based searches plus collection of data from a range of SGL offices that have competed project commissions on relevant facilities and developments.

The review indicates there are a limited number of Waterparks and Water Play facilities in either country with 17 in total and 5 such facilities (all outdoors) located in New Zealand and 12 facilities in Australia (all but one outdoors). The facilities unless located in hot climate areas (Queensland or Western Australia) are all seasonal facilities mainly open November to April each year. The review indicated the main facilities were located as follows:

**New Zealand**

- Waiwera Infinity Thermal Spa Resort, Auckland
- Aquatic Park Parakai Springs, Auckland
- Waterworld, Hamilton
- Splash Planet, Hastings (located adjoining to an indoor pool)
- Hanmer Springs Thermal Resort, Hanmer Springs

**Australia**

**Australian Capital Territory**

- Big Splash (waterpark), Canberra

**New South Wales**

- Jamberoo Action Park in Jamberoo
- Wet'n'Wild Sydney

**South Australia**

- The Beachouse in Adelaide

**Queensland**

- Wet'n'Wild Water World on the Gold Coast
- WhiteWater World on the Gold Coast
- Sugarworld Cairns
- Wetside Water Park in Hervey Bay

**Western Australia**

- Adventure World in Perth
- The Great Escape in Perth

**Victoria**

- Adventure Park in Geelong
- Funfields Whittlesea

It should be noted that limited information is available on usage, operational and development costs of the varied waterpark and water play facilities, mainly due to the commercial nature of these developments and public information not available on usage and business results.

We have also added to the water park review an overview of the latest indoor water play and waterslide facilities recently constructed in Australia and New Zealand that have been linked to aquatic facilities.

The facility review is listed in two sections. **In Table 4.5** we list a sample of waterparks and water play facilities and **in Table 4.6** we list a range of local authority waterslide and water play development examples linked to aquatic facilities that SGL has been involved with over the past 2 to 3 years.

**Table 4.5**
**Overview of Waterparks and Water Play Areas NZ and Aus.**

| Facility/Location | Photo/Layouts | Park/Facility Features |
|---|---|---|
| **Wet and Wild – Gold Coast Queensland Australia**<br><br>(Photo and Data from: Wet and Wild Gold Coast Website) |  | Wet and Wild Gold Coast is the 5th most used waterpark in the Asian region with 1.2m visits/yr.<br><br>It is located on the Gold Coast in Queensland Australia on approximately a 20,000m² waterpark site with adjoining 15,000m² of car parking.<br><br>This sees a development land area take up of approximately 35,000m² or 3.5 hectares.<br><br>Annual attendances range from 2,000 a day in the colder months to 10,000/day on hottest days.<br><br>The park is open all year round 10 am to sunset (closing times vary) and average entry fees are:<br><br>• Day pass: $59.99<br>• Annual Pass: $99.99<br>• Three Park Pass: $109.99 |
| **Wet and Wild Sydney Prospect New South Wales**<br><br>(Photo and Data from: Wet and Wild Sydney Website) |  | The latest waterpark in Australia is timed to open in December 2013 and will include 42 major slides and attractions.<br><br>The park is being developed by Village Roadshow and is expected to see the creation of more than 300 full and part time jobs during the construction and ongoing operation of the Park<br><br>The website indicates it will record more than a $500 million turnover contribution to Western Sydney economy in first 10 years of operations.<br><br>The park is located on a 25-hectare (62-acre) in Prospect, New South Wales and will have a variety of attractions including two wave pools, two lazy rivers, a children's Aqua Play area.<br><br>There will be several slide towers featuring WhiteWater West water slides including two Aqua Loops, a Boomerango, duelling Master Blasters, a Super Bowl, an Abyss, a six-lane Wizard, two family raft rides, and a collection of inline tube slides. |

| Facility/Location | Photo/Layouts | Park/Facility Features |
|---|---|---|
| **Adventure Park Wallington Victoria**<br><br>Open November to Easter each year.<br><br>(Photo and Data from: Adventure Park Website and Brochures) |  | Park opened in 1995 and in 2006/07 had a $10M upgrade with new features including:<br>▪ River Torrent Lazy River with inner tube ride is just under 300m in length<br>▪ Tiny Tots Splash Zone with interactive water play with waterfalls, mini waterslides etc.<br>▪ Six Lane Aqua Racer with speeds of up to 40kph and sensors to time and rank riders,<br>▪ Bonitos Bay Water play area, a themed Caribbean Pirate Adventure,<br>▪ Rapid rider Water Slide with 110 metres in 20 seconds and a 2 metre plunge at end,<br>▪ Tunnel of Terror Waterslide with a 120 metre. pitch black ride on an inflatable raft<br>▪ Jumping Jets with over 30 fountain jets.<br>▪ Other attractions are Kids rides with a Carousel, Electric Cars, Trains and Moon Bikes: and family rides including go karts, aqua bikes, canoes, paddle boats, mini golf.<br><br>Currently local residents account for 8% of visits and 92% out of the Geelong area. |
| **The Beach House Glenelg South Australia**<br><br>(Photos and Data from: The Beach House Website and Brochures) |  <br>  <br>  | Private ownership by Taplin Group and management under 40 year lease to the Rimington Group.<br><br>Components include:<br>▪ Three fully enclosed and heated waterslides – two body and one raft - with rides up to 130 metres at 90 litres a second,<br>▪ Ferris wheel, carousel, dodgem cars, bumper boats, minigolf, a train, play castle, arcade games and cafe<br><br>There is no entry cost and all rides and games are accessed via a "Fun Card" system with the card being purchased for $2 and kept by the user. The Card is then charged with purchased credits depending on the rides, games and packages purchased.<br><br>At $1 a credit, costs include waterslides ($3), bumper boats ($6.50), minigolf ($9.50) dodgem cars ($6.50), play castle ($9.50). Time cards may be purchased for 2 hours of unlimited rides slides and games. For example Kids Card costs $20 for play castle, train, carousel and any 5 games, and Slides Card costs $35 for water slides, bumper boats, dodgem cars, minigolf, arcade games and prizes games. |
| **Big Splash Water Park Canberra ACT Australia**<br><br>Open November to March.<br><br>(Photos and Data from: Website and Brochures) |  | Privately owned and managed. Components include:<br>▪ 5 heated pools<br>▪ 9 waterslides (two from a high tower, two short and fast and one for small children, inflatables)<br>▪ Jumping Castle<br>▪ Restaurant kiosk, child play areas<br><br>Payment is made for either water park entry for slides + swim + inflatables or for swim only. |

| Facility/Location | Photo/Layouts | Park/Facility Features |
|---|---|---|
| **Big Splash Waterpark (Continued)** |  | Waterpark entry for slides, swim, and inflatables – Adult and child $25 a day; 3 pm to 5 pm $17 a day, and Splash Island from 3 years old (height limit) $10 a day.<br><br>Swim only or Entry – Adults $8, Children (U2 years free) $6, Aged pensioners $4,<br><br>Season Passes (November to March swim only) - single $250, Family of 3 $440. Per extra person $25. |
| **Hanmer Springs Thermal Resort Hanmer Springs South Island New Zealand**<br><br>(Photos and Data from: Website and Brochures) |  <br>  | The Thermal Pools and Spa resort now attracts over 600,000 annual visits and has a range of pools:<br>▪ Twelve open-air thermal pools,<br>▪ Three sulphur pools and<br>▪ Six private indoor thermal pools, as well as a sauna/steam room.<br><br>The new freshwater, heated swimming pool has "resort style" walk-in beach access and a "Lazy River".<br><br>The popular family activity area of water slides, water toys and picnic area has been enhanced with the addition of the Aqua Play Area and Super Bowl.<br><br>The pools range in temperature from 28 to 42° Celsius<br><br>The Hanmer Springs geothermal water is drawn from a bore adjacent to the reserve complex, providing natural water of the highest quality.<br><br>There is also a Hanmer Springs Thermal Pools & Spa experience where visitors can also enjoy a range of massage and beauty treatments from the trained professionals at The Spa. These include Swiss and sports massage, detoxifying body wraps and aromatic facials.<br><br>The charges to visit the pools are $20 for an adult, $13 seniors and $10 for a child. Daily passes are $25 for an adult, $18 for a senior and $13 for a child |
| **Splash Planet Hastings North Island New Zealand**<br><br>Open November to April 10 am to 6 pm<br><br>(Photos and Data from Website and Brochures) |  <br>  | Splash Planet Hastings has indoor pools, outdoor water park features and dry amusement rides. The park is open November to April and is privately managed. Waterpark facilities include:<br><br>▪ Masterblaster<br>▪ Sky castle screamer<br>▪ Sky tunnel<br>▪ Super cruiser<br>▪ Never ending river<br>▪ Bumper boats<br>▪ Double dipper<br>▪ Pirate fortress water play (under 8)<br>▪ Pirate run water play (8 to 16 years)<br>▪ Kayaks<br><br>The facility also has indoor heated pools and toddlers pools. Prices are adult $28 and child $18 and a local area child resident access card entry is $14 |

| Facility/Location | Photo/Layouts | Park/Facility Features |
|---|---|---|
| **Parakai Springs**<br>**Parakai North Island**<br>**New Zealand**<br><br>Open all year round 10 am to 9 pm<br><br>(Photos and Data from: Website and Brochures) |  | Large indoor and outdoor pools and two thrilling hydro-slides have been the main attractions for many years.<br><br>BBQ and picnic areas are situated throughout the park and options for hiring marquees for groups is also available. Now extensively redeveloped into an active water recreation centre. Facilities include.<br><br>• Large outdoor thermal pool heated to 32°C<br>• Gentle slope beach area for small children<br>• Large indoor thermal pool heated to 40°C<br>• Two waterslides one long and the other longer!<br>• Private thermal spa pools<br><br>Prices are adults $20, child $10 and toddler $5. |

The review of a sample of waterparks in Australia and New Zealand indicate the majority of waterparks are seasonal outdoor parks with limited appeal due to aged and out of date rides and attractions. Excluding Wet and Wild in the Gold Coast, which is the 5th most visited waterpark in the Asian area and number one waterpark in the Oceania region at 1.2M visits, the majority of other parks were developed in the 1980s and 1990s. The review of these parks (excluding Wet and Wild) indicates due to seasonal weather conditions the majority are open 4 to 6 months of the year. Average entry fees range from $10 to $40/day and the parks have a number of common zones being:

- Feature/signature waterslides some using inflatables but also basic body waterslides
- Water play areas with splash pads or shallow pools with some offer more than one play area so they can separate these for under 10 years and 10 to 16 years.
- Lazy rivers using floatation aids
- Dry attractions/rides with some also linking in amusement and arcade type activities
- Picnic and parkland areas
- Food and beverage on site and linked to merchandise retail zones
- Amenities and change facilities and large areas of onsite parking

As the facilities were outdoors and seasonal the majority were developed on large land holdings (2 to 5 hectares) so they could have a lot of people visit on the days they were open. To attract a lot of people they also needed a large supply of car parking with extra land adjoining for overload car parking. **Discussion with waterpark management and owners indicated that the majority of customers came on hot days (25 degrees plus) and usually came in family groups and stayed most of the day at the facility. This enabled them to not only receive revenue from gate entry but also raise revenue from food/beverage sales, shelter and table hire and retail merchandising.**

Most operators indicated it was difficult to fund major waterparks due to the seasonal nature of the business and most were developing their parks overtime by introducing a new ride each season. The most common trend in the industry in warmer climate areas was the introduction of waterpark features to traditional amusement or theme parks such as the Gold Coast where both Dreamworld and Sea World have developed specialist water park features

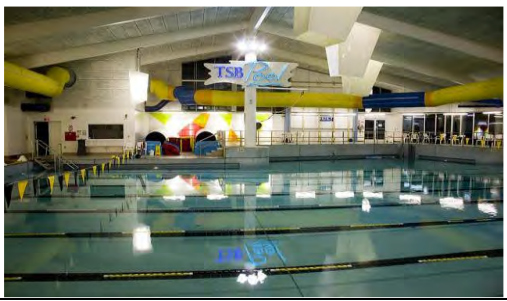
### 4.2.10 Linking Waterpark Facilities with Aquatic Leisure Centres

The following table highlights a range of aquatic facilities that have added significant waterslides/water play areas to aquatic leisure facilities. These facilities can be benchmarked for comparison with aquatic facilities that have incorporated significant leisure water.

**Table 4.6**
**Sample of Indoor Aquatic Waterslide/Water Play Areas NZ and Aus.**

| Facility/Location | Facility Features |
|---|---|
| **Geelong LeisureLink**<br>**Waurn Ponds Geelong Vic Australia**<br>  <br>  <br>  | Built 2 years ago the $31M replacement aquatic facility has been well received. Key features include:<br><br>• Has now in-excess of 900,000 annual visits and more than 10,000 members across health and fitness, LTS and multi-visit passes.<br>• Gym – state-of-the-art gym with extensive floor space and a wide range of cardio and strength equipment.<br>• Group exercise rooms – three areas that house Les Mills, freestyle, cycle and mind-body classes.<br>• Wellness centre – home to Corio Bay Health Group.<br>• Café – featuring a large seated area overlooking water areas.<br>• Change rooms – separate wet and dry areas plus family and unisex accessible rooms.<br>• Main pool - an 8-lane 50m pool with ramp access which can be divided into two 25m pools.<br>• Program pool – multi use warm water pool with ramp access.<br>• Learners' pool – designed for Learn to swim classes and recreation.<br>• Toddlers' pool<br>• Spa and sauna<br><br>The attached indoor waterpark (tension membrane fabric) includes:<br><br>• Cannon Ball Slide – a high-energy tube ride with an exhilarating drop, giant bowl spins and an exciting transition into the slide pool.<br>• The Black Hole – a fully enclosed slide that shoots you into a spiral of pitch black tubes where you twist, turn and drop until the final splashdown.<br>• Adventure Playground – includes slides, water cannons, spinning water wheel and a large overhead tipping bucket allowing kids to splash, climb and be entertained for hours.<br>• Splash Pad - featuring fountains and water spray equipment where children can play safely on rubber mat flooring in zero depth water.<br><br>The centre is now recording a much higher spend per visit ($6 to $7) due to the new waterslides and water play areas plus major health club. Management indicates these facilities have also contributed to major increases in food and beverage sales and retail sales as people are staying at the centre longer. |
| **Casey RACE – Cranbourne Vic Aust.**<br>  <br>  <br>  | Developed and owned by the City of Casey the new Casey RACE incorporates:<br><br>• Indoor $40M centre open 2 years<br>• Indoor 51.5m pool with moveable boom<br>• Separate warm water pool and learn to swim pools<br>• 900mm² gym and 500m² dray activities rooms<br>• $9M indoor leisure area that includes slides, water play and integrated leisure pools<br>• School change and group entry<br>• Well located café<br><br>The centre services a population of 60,000 people and attracted 580,000 visits in year 1 and 750,000 visits in year 2. Peak price charge covers use of all waterpark features and this is set at an extra fee on normal entry charges of $1.00 for children and $1.50 for adults per visit.<br><br>Peak times are 4 pm to 9 pm weekdays and all day Saturday and Sunday and public Holidays. The extra charge guarantees that all waterslides and water play features are available to use at no extra cost except for the peak surcharge.<br><br>Management estimates 75% of customers visit the centre in peak times and this saw an estimated return of $350,000 to $400,000 in year one in extra revenue using this two time zone entry fee. |

| Facility/Location | Facility Features |
|---|---|
|  <br>  <br>  | **Glen Eira Sports and Aquatic Centre is located in East Bentleigh, Victoria, Australia**<br><br>GESAC is one of the two latest major indoor aquatic leisure facilities built at a cost of $45m in Melbourne and includes indoor and outdoor aquatic facilities plus indoor health and fitness and indoor sport court facilities.<br><br>The centre has been open less than a year and has got more than 10,000 members and most programs at capacity.<br><br>The centre was developed at an outdoor pool site (East Bentleigh Swimming Pool and already has had to add extra car parking and service areas due to high use.<br><br>A feature of the centre is its leisure water with water play zone, interactive water jets and slides and indoor warm water program pools.<br><br>   |
| **WaterMarc – Greensborough Vic Australia**<br><br>  <br>  | **WaterMarc** is the latest community aquatic leisure centre built in Melbourne at a capital cost of $45M and is part of a regional shopping centre redevelopment in Greensborough in the City of Banyule.<br><br>It is positioned as the Northern Metropolitan Regional Aquatic Leisure Centre and has a mix of competition, recreation, leisure, health and fitness, wellness and social facilities. Annual attendances are estimated at around $1M visits year one<br><br>The centre has very good examples of well designed warm water program pools, health and fitness centre, wellness and indoor adventure water play and water slides<br><br>The centre is well serviced by underground car parking and lifts. It also presents a very good example of self-service food and beverage areas linked to wet/dry lounges.<br><br>  |

| Facility/Location | Facility Features |
|---|---|
| **Caroline Bay Trust Aoraki Aquatic Leisure Centre Timaru**<br>  <br>  <br>  | Caroline Bay Trust Aoraki Centre is an indoor heated aquatic centre in Timaru featuring:<br>• Main Pool, 25m x 25m - 1.4m to 3.4m deep, 27.8°C (10 lanes).<br>• Programme Pool, 17m x 12m - 1.2m x 1.8m deep, 32°C. Variable depth pool. Includes wheelchair access and hydrotherapy area.<br>• Leisure Pool with Splash Deck and Beach Access, 32°C.<br>• Toddlers Pool, 33°C.<br>• Outdoor 50m Pool (8 lanes). Seasonal pool closed in winter.<br>• Chillax Area - Steam, Sauna and Spa, 38°C.<br>• Children's Water Playground with slides, water jets and buckets.<br>• Rapid River<br>• Bubble Pit<br>• Bombing Tower (3m high) - subject to pool space availability<br>• Springboard (1m high) - subject to pool space availability<br>• Hoist and ramp access to some pools<br>• Spacious private family change rooms<br>• Disabled change facilities<br>• Large modern change rooms<br>• Lift access to gym<br>  |
| **Todd Energy Aquatic Centre – New Plymouth North Island New Zealand**<br>  <br>  | The Todd Energy Aquatic Centre is an indoor and outdoor swimming pool and complex centrally located in New Plymouth. Adjacent to the Coastal Walkway, with access off Tisch Avenue.<br><br>The centre was redeveloped and now includes the following indoor water areas:<br><br>• **Main pool:** Wave machine, water features, eight lanes, tarzan rope and inflatable toys. Temperature 28 degrees. Depth 0.0 - 2.1m, length 25m.<br>• **Spa pool:** Temperature 37 degrees.<br>• **Tots pool:** Bubbles feature and slide. Temperature 32 degrees. Depth 0.3-0.5m<br>• **Hydroslides:** Two slides (one turboslide and one family slide). Entry and exit is within the indoor complex being.<br>  ○ **Turbo slide:** Users must be over eight years of age and be 120 centimetres or taller and not weigh more than 105 kilograms.<br>  ○ **Family slide**: Children five to seven must ride with a caregiver over the age of 16. Children over the age of eight can ride the family slide unaccompanied.<br>• **Outdoor main pool:** Seven lanes. Length 50m. Depth 1.1–1.4m. Open Labour Weekend until mid April.<br>• **Outdoor learners pool:** Depth 0.8m.<br>• **Outdoor tots pool:** Depth 0.3m.<br>• **Dive pool:** Depth 3.9m. Two diving boards 1m and 3m high. |

### 4.2.11 Aquatic Leisure Centres with Waterpark Facilities Trends

The review of the sample facilities with significant leisure water features clearly shows that the inclusion of waterslides and water play facilities that are provided in many cases indoors at community aquatic leisure centres are working well and directly contributing to:

- Increased visitations with larger numbers of people attending with families and friends.
- Keep people at the centres longer due to the entertainment and social facilities offered.
- Increasing numbers of people purchasing food and beverage and retail services as they are staying longer and looking to use such offers.
- Allowing higher entry fees to be charged.
- Increasing the annual fees per visit from those seen at a traditional aquatic leisure centre.
- Generating more revenue to help fund the increased operating costs of adding water play and waterslides to such facilities.
- Allowing centres to market themselves to a broader interest market than just the health and fitness and lap swimming markets.

The majority of centres with new waterslides and water play areas were recording fees per visit of between $6.50/visit and $8.00/visit. This is compared to say previous years operations at Christchurch City Council Aquatic facilities that on average recorded low entry fees per visit of between $1.19/visit (QEII 2010 CERM) and $3.60/visit (Jellie Park 2011 CERM).

Secondary spend was also significant at $1.00/visit to $1.26/visit compared again to results at Christchurch City Council Aquatic Centres of between $0.01/visit (Pioneer Recreation and Sports Centre 2011 CERM) and $0.33/visit (QEII 2010 CERM).

These trends clearly support the addition of waterslides and water play areas plus improved food and beverage and retail services at traditional aquatic leisure centres as a means of improving both the services provided and assisting with improving the sustainability of the facilities.

### 4.2.12 Summary of Waterpark and Water Play Facilities Review

The review of standalone waterparks and water play facilities linked to aquatic facilities review completed for this study indicates that though waterparks and water play areas are recording very high visitations and facility development throughout the world, such development is much slower and at lower scales of development currently in New Zealand and Australia.

For example the World Waterpark Association estimates there are around 1,420 waterparks located around the world with approx. 800 in the USA and followed then by the high growth areas of Asia with more than 200 water parks.

Currently there are only 17 waterparks located in the Oceania Region with Australia having 12 waterparks and New Zealand 5 waterparks.

Lower population density, lower average monthly temperatures and higher salary rates are highlighted as the main contributing factors to lower waterpark development in these two counties.

The top ten waterparks in the USA and Asia regions attract between 700,000 and 2M visits a year and to achieve these visitation results there needs to be a significant local/regional population (between 500,000 and 5M) surrounding the facility as well as high tourist/visitor numbers coming regularly to the region (1M to 3M+ annual visits).

The benchmarking of the most used waterparks in the USA and Asia indicate that visitors from the local region make up 25% to 40% of users and are drawn from people living within 0km to 100kms. More importantly most parks estimate at least 65% to 80% of their visitation numbers come from tourists visiting the area on an annual basis.

Visitation numbers are higher at waterparks that are located in hot temperature areas and the industry viability rule we have seen quoted requires more than 100 plus days of daily temperature at 25 degrees Celsius or greater to ensure maximum attendances for water based activities. This can obviously be changed if facilities are located indoors.

The fastest growing segments of the waterpark industry according to the World Waterpark Association are Municipal owned swimming centres developing waterslides and water play zones at swimming pools and indoor waterparks being attached to hotels or resorts.

Both these trends are evident in Australia with significant development of indoor water play and waterslides at a large range of new facilities as well as retrofitted at a number of aged aquatic facilities.

Specific development trends identified from the review in relation to successful waterslide and waterpark development includes:

- Providing enough activity areas (large site) to develop clear activity zones to cater for preschool, primary school, secondary school, young adults and parent age ranges so people of different ages, interests, skills and abilities can all attend and have fun in the water.

- Ensuring a mix of lazy/slow rides and attractions located close to family fun and play areas and adventure/thrill rides located near deeper water areas such as wave pools or flow riders etc.

- Setting up a slide area with multiple slides off towers with a different range of launch platforms that allow for more rider throughout, variation in rides off setting boarder through repetition (single ride slides). This also would see multiple slides exiting off the one tower to also allow staff supervision costs to be shared by more riders.

- Mix of different width flumes allows for individual riders, inflatables and raft rides. They can all still exit from a central tower but encourage different types of riders to use the facility.

- Need to ensure adequate area on towers for access, inflatables storage and queuing areas for riders.

- Dropping riders into concourse flumes (not plunge pools) speeds up riders exit from the ride as well as improving rider safety by slowing down from fast rides.

- Use of inflatable rides reduces the skill level required of riders as the inflatable takes most of the ride pressure and the rider hangs on. This means more people can use the ride and level of fitness and body type are less important.

- Linking slides and rides to lazy rivers enables greater rider capacity as more people can use then come out into the rivers in inflatables and drift round the river after the ride before exiting the river to ride again.

- Ensuring adequate parking to allow people to come and park most of the day so they stay as long as possible at the site.

- Ensuring that there are adequate change areas, food and beverage and retail zones for the number of daily visitors.

- Have an ongoing upgrade program as rides age and new rides evolve need to update the keep interest and repeat visits.

# 5 EVALUATION OF FACILITY DEVELOPMENT OPTIONS

## 5.1 INTRODUCTION

This section of the report looks at analysing and evaluating the various aquatic, waterpark, water play, hot salt pool and associated leisure and entertainment development options that have been presented or nominated by interested parties.

Our review of the various development ideas and submissions also indicate a number of other common themes are blended through them including:

- Development aims to build off the coastal features and easterly location of the area.
- Building off the historical theme of leisure, fun, entertainment and shopping at coastal areas that have been a feature of people "getting away to relax and enjoy these areas".
- Provide not only just replacement facilities for those damaged by earthquake activity but also to provide a mix of "state of the art" activity components that will attract large numbers of new visitors to the area.
- Linking together the themes of water, fun and relaxation to guide facility development.

We need to note that after assessing each of the development proposals that most fit into the category of "good ideas" and are not detailed enough or have got refined development proposals that can at this stage undergo feasibility and viability review.

We do not see this as a negative but rather as an adequate starting point to many of the most successful community development projects born out of the significant environmental impacts such as the earthquake damage has brought to this area.

This section covers:

- An assessment of the Waterpark Concept and key issues relevant to the local and district area, City of Christchurch, Canterbury Region and beyond.
- Consideration of the right size of development for any funded (private or public) aquatic and leisure based facility within New Brighton taking into account the likely wider aquatic network, catchments, proposed other aquatic development (i.e. New Metro Centre) and other relevant economic and social factors.
- Evaluation of the Water Park and other development options in terms of their establishment and maintenance costs, including build costs, land purchase, patronage and viability.

The analysis and evaluation findings have then been used to form the base strategies for recommended future development options.

## 5.2 WATERPARK CONCEPT ASSESSMENT

The proposed waterpark concept links together a local/district proposed list of standard indoor aquatic facilities (competition/leisure and education water areas) with high attractor water based rides and play experiences.

In considering the viability of this proposed development it needs to be noted that the plans are very undeveloped and conceptual and are not of a standard to be able to judge final development area. They also lack detail on critical areas such as services, car parking, plant rooms, landscape buffer zones and development costs such as professional fees, licence and permit fees etc.

We note from the proponents documents and general concept that they have put forward that it is an early idea and not a detailed development concept. From the proposal there are a number of development themes that we can comment on being:

- **All facilities will need to be indoors which allows 365 days use a year in any climatic conditions.** Key industry trends indicate waterpark use decreases considerably if area temperatures are less than 25 degrees Celsius so indoor facilities are essential in the proposed location (as average monthly temperatures do not reach these levels). This will add to development and operational costs.

- The proposal puts forward **using new technology and light weight/low cost roofing structures** to minimise overhead building structure costs and redirect funds for more water activity areas and rides to attract more users. We are aware of such building products and structures in North America and European waterpark installation but we are uncertain to the cost savings and energy impacts this type of structure delivers in a Southern Hemisphere location where freight costs, construction costs and services costs differ.

- The design of **opening up parts of the facilities for outdoor experience** on days where this will enhance user experience (hot/humid days) whilst also protecting users from the easterly winds the area regularly experiences is a positive design experience but the cost of these enhancements and impacts on energy costs are not known.

- The proposal **appears to provide activity areas for the majority of user markets** being:
    - **Recreation/leisure/fun/:** usually 40% to 60% of facility user markets
    - **Competition/fitness:** usually 25% to 30% of facility user markets
    - **Education/Learn to swim:** usually 10% to 20% of facility user markets.
    - **Social/Entertainment:** usually 10% to 20% of facility user markets
    - **Therapy/health:** New emerging market as people age usually 10% to 15% of facility user market.

- The proposal also **offers other revenue generating activities** to help subsidise the high cost of water facilities including health and fitness facilities, upgraded food and beverage and retail services.

### 5.2.1 Review of Capital Cost Estimates

The estimated capital cost in the project proposal of $34.7M in our industry experience is significantly understated when a likely total project cost is considered. The proposal has a significant number of building, site, services and development costs not covered in the documentation and a lack of scale development plan makes it difficult to relate some of the missing costs to a reasonable allowance. Our review highlights the following areas that will require adding to the capital cost estimates:

- **No site costs** for clearing of site, demolition of existing structures or earth works etc. (this is understandable as no site chosen but need to have an allowance for these activities. Based on the size of development we think this needs to be in the order of $1M to $1.5M.

- Development **has assumed light weight structures** but need to check these against relevant new building codes in the Christchurch area and as well as advise on the energy efficiency and impact on services required to heat these internal areas. ***Not able to estimate the cost impacts of this structure as a traditional building development would be in the order of $4,000 to $5,000m².***

- **No site car parking, access roads and associated service costs** covered in the project budget. Industry trends indicate a critical success factor for such facilities is car parking so based on a 900,000 estimated attendance this would see a 2,000 to 3,000 person a day visitation target and therefore a 500 to 600 car park minimum requirement with special event overload parking options close by for use on busy days. ***This could cost between $1.5M and $2.5M subject to land levels and soil conditions and final layout design.***

- **No allowances for bringing services to the site or connection of services** to the site and facilities. We understand a site has not been chosen but there is need for an allowance for these works. ***Based on the size development we would estimate $500,000 to $600,000 would need to be reserved for this activity (subject to final development).***

- There are no allowances for plant rooms and service areas and provision of adequate services such as filtration, pumps, generators, heat exchangers etc. cannot be assessed. Based on say plant areas of 500m² we estimate for plant rooms that **there needs to be an allowance of $1.200M to $1.250M.**

- There are no project management or design and engineering fees allowances. Based on a construction project of say $35M there needs to be **an allowance of between 12% and 15% for these services, which would be in the order of $4.2M to $5.250M.**

- As the design is only at a very preliminary conceptual stage there needs to be allowances for design and construction contingencies, as a lot of items will change as detailed design and construction occurs. Based on a $35M project cost and a 5% allowance for design and 5% allowance for construction **the estimated extra contingency allowance should be in the order of $3.5M.**

- There are no fittings, fixtures and Equipment Allowances (FF and E), which can be in the order of 1.5% and 2.5% of capital costs. Based on a $35M project this would see an **estimated extra cost of $525,000 to $875,000.**

The review of the estimated capital cost of development of the New Brighton Waterpark Proposal at $34.7M is significantly understated when the above missing capital cost and project fees are considered. Based on these estimated allowances for these missing costs the **extra capital costs, subject to site and development requirements are likely to be in the order $12.425M to $15,475M.**

**When these costs are added to the estimated $34.7M capital cost this would see the development likely to be in the order of $47M to $50M and excludes any land acquisition costs.**

### 5.2.2 Review of Operational Usage and Operating Results

The proposal has a one page usage and operating model summary that has no detail on user or business assumptions. Normally such development proposals would be backed up by a detailed feasibility study and detailed business plan.

We understand this is a very preliminary concept proposal but based on the projections listed in the proposal we note the following review issues:

## 1. Usage

- The proposal indicates the new waterpark facilities are estimated to attract 900,000 visits a year. This would see an average visitation of 2,500 visits per day or maybe a low use range of 2,000 visits/day and a high use of 3,000 visits/day.
- This is significant number of visitors to any facility in Christchurch and there are no assumptions or justification as to how these visitation numbers are determined.
- Achieving these visitation numbers from an industry trend perspective would place the New Brighton Waterpark for example as greater than the 6th busiest waterpark in the USA and the eighth busiest waterpark in Asia. This is extremely unlikely for the facilities and area of development proposed.
- The catchment analysis for a new aquatic leisure facility in the north-east region of the city (see section 2.5) indicated around 80,000 people live in the primary catchment zone of the centre. Based on an average of 6.9 visits/population the community aquatic facilities we would expect to see a facility visitation rate of between 530,000 and 650,000 annual visits.
- If significant water park features are added to this community facility we would expect to see a 20% to 30% increase (based on aquatic leisure centres business trends in table 4.6) to say 106,000 to 195,000 extra visits. This would see the new centre likely to attract between 640,000 and 850,000.

## 2. Revenue

- The proposal indicates the 900,000 visits are expected to generate 600,000 visits @ $10/visit and 300,000 visits @ $3.00/visit which would generate $7.400M in annual operating revenue. They have also indicated a lease fee rental of $200,000 (not nominated where it comes from).
- The projected per head spend of $3.00/visit and $10.00/visit is significantly high compared to the current per head spend achieved at current Council aquatic facilities being between $2.69/visit at Pioneer through to $3.60/visit at Jellie Park.
- Industry trend indicate where waterslides and water play equipment is added to traditional aquatic facilities that the per head spend for entry fees can increase by $1.00 to $1.50/visit.
- Retail and food and beverage spend is currently very low at Council centres but this area is usually impacted by the inclusion of waterslides and water play areas with people coming in larger family and friends groups and staying longer. This can see a much higher secondary spend at these types of centres.
- Based on these trends we would assume that the likely per head spend for a combined aquatic facility and waterpark would be in the order of:
    - Spend per visit say $5.00/visit to $5.50/visit
    - Secondary spend of $1.00/visit to $1.25/visit
    - Combined spend per visit would be in the order of $6.00/visit. To $6.75 visit.
- Based on annual attendances of say 650,000 to 800,000 then the likely annual revenue range would be in the order of say $3.900M to $5.400M.
- This indicates the estimated revenue for the New Brighton Waterpark when compared against industry spend trends is likely to be significantly overstated.

**3. Operating Expenditure**

- The proposal indicates operating expenditure for year one would be $3.3M.
- This was made up of staffing (28 EFT positions) at $1.4M and operating costs of $1.9M.
- The operating cost estimate is not detailed enough for us to try and work through a likely operating cost for similar facilities but when compared to such facilities it appears significantly understated.

**4. Summary of New Brighton Waterpark Business Projections Review**

The review findings indicate:

- Projected usage is likely to be high and based on industry trends and catchment analysis the likely visitation numbers are more likely to be in the 650,000 to 850,000 range (if all facilities are built at the one site).

- Annual revenue estimates projected are also high and the projected annual revenue at $7.400M is more likely to be in the range of $3.900M to $5.400M.

- There is not enough detail to assess the operating expenditure estimates but industry trends indicate that the addition of water park features adds significant operating expenditure for more staffing and energy and maintenance costs.

**Based on these findings and principally due to the lack of detail we would have to assess the usage and business projections are likely to be overstated in usage and revenue and understated in operating expenditure.**

We would recommend if the development is to be considered further then it has a detailed feasibility study and business plan prepared so these matters can be developed based on recognisable and justifiable trends and assumptions.

### 5.2.3 Other Potential Business Improvement Initiatives

The only area that is a 'known expanding activity market' the proposal does not address in our industry experience is in the lack of high yield water area such as hot pools (could be salt water) and wellness/spa facilities such as treatment and therapy rooms.

SGL has been involved in redevelopment and rejuvenation of a range of aged aquatic facilities that have introduced such new activity areas (Hanmer Springs Thermal Pools and Mount Maunganui Hot Pools) and these have been successful in attracting significant more users whilst also providing more profitable activities.

A future combined facility that incorporates all of the proposed features, on a high profile site in the East precinct has significant chance of receiving high use and attracting high revenue generating users as it will become the one stop shop for a large range of activities under the one roof.

If such a development can be located within the retail and commercial zone close to coastal foreshore areas then this will further enhance the attractiveness of the facility and activity offers especially if it can be linked into the landscape of the coastal area.

### 5.2.4 Size and Scope of Facilities to Complement other Area Aquatic Development

Though the base concept of a joint aquatic facility with waterpark features meets key industry success factors, in our opinion the projected likely size and scope of New Brighton or East Precinct development does need more detailed review due to the proposed new Metro Centre being developed more centrally to the City's population.

The Metro Centre is planned to become the new regional facility for not only Christchurch but also for the Canterbury Region and South Island. It is planned to replace the QEII facilities especially for main aquatic competition, training and events.

Prior to closure the QEII annual Centre for Environmental Recreation Management (CERM) results indicated in 2010 it attracted annual visitations of in excess of 1.8M visits.

Development of the Metro Centre should be based on it attracting significant usage from the former QEII facility area catchments and therefore the local North East Precinct facility replacement planned (E, R & S Centre) needs to offer more lower scale activities for a user catchment in the order of say 500,000 to 650,000 annual visits within the cost range of $30.5M.

The addition of $6.5M to the E,R & S Centre capital cost for waterslides and water play facilities will be a significant attractor and should help increase user visits to 650,000+ visits. The catchment analysis data in section 2.5 indicates that the Metro Sports Centre can still operate to its potential even with an upgraded E,R and S Centre as it can draw across the whole city catchment.

To put this amount of water play and water slide funding in context the allowance of $6.5m will see the centre being allocated the highest leisure and water play budget features of any Council operated facility across New Zealand and Australia.

Recent regional aquatic facility developments SGL has been involved with throughout both countries and their estimated spend on water play, waterslide and entertainment features confirms this as follows in the following table:

**Table 5.1**
**Summary of Major Water Features Capital Expenditure**

| Facility | Water Play and Water Slide Features | Estimated Capital Budget for These items |
|---|---|---|
| Caroline Bay Trust Aoraki Centre New Zealand | • Indoor dual hydro slides and tower<br>• Indoor water play structure and splash pad (TD 250)<br>• Indoor rapid river | $2M ($NZD) |
| Melbourne Sports and Aquatic Centre – Melbourne Australia | • Dual flow rider and new surf retail area. | $2.5M ($AUD) |
| Glen Eira Sports and Aquatic Centre – East Bentleigh, Australia | • Indoor dual water slides and tower<br>• Indoor water play structure and splash pad (TD 250)<br>• Indoor toddlers interactive water play area | $3.2M ($AUD) |
| WaterMarc – Greensborough Australia | • Indoor dual water slides with inflatables and tower<br>• Indoor water play structure and splash pad (TD 850)<br>• Indoor toddlers interactive water play area with interactive sprays and jets. | $2.9M ($AUD) |
| Casey RACE – Cranbourne Australia | • Indoor dual water slides with one slide for inflatables and one speed bowl and tower<br>• Indoor water play equipment and splash pad.<br>• Indoor toddlers interactive water play area with interactive sprays and jets. | $4.0M ($AUD) |
| LeisureLink - Geelong Australia | • Indoor dual water slides with inflatables and tower<br>• Indoor water play structure and splash pad (TD 850)<br>• Indoor toddlers interactive water play area with | $4.0M ($AUD) |

| Facility | Water Play and Water Slide Features | Estimated Capital Budget for These items |
|---|---|---|
| | interactive sprays and jets.<br>• Tension membrane fabric roof area | |
| Frankston Regional Aquatic Centre – Frankston Australia | • Indoor dual water slides with inflatables and tower<br>• Indoor water play structure and splash pad (TD 850)<br>• Indoor toddlers interactive water play area | $3.9M ($AUD) Tendered and under construction |

Each facility budget figure nominated will also have allowances for facility services, building structure etc. The key issues for the proposed New Brighton facility is that the $6.5M allowance will enable the purchase of significant water play and waterslide features.

The $30.5M allowance for base facilities should see a 5,000 to 5,500m² development funded (based on industry average allowance of $5,000m²) subject to final site chosen, the cost of construction and service connections required on this site.

The allowance of $6.5m for water play and water slides based on an allowance of say $4M for water slide items would allow the balance of $2.5M to fund a building area of 500m² for water play based on traditional building structures.

Further investigation of the proposed light-weight structure is supported. If this type of structure is suitable it will allow for an increase in activity area capital budgets that will cater for more people compared with more expensive building structure that do not attract additional people.

### 5.2.5 Other Proposed Features

The proposed allowance of $3M for outdoor spas requires a more detailed review. If a suitable site can be developed close to a coastal location then the opportunity to develop New Zealand's third salt water spa area (only one in the South Island) is a significant opportunity.

Currently the high use Mount Maunganui Hot Salt Water Pools in the North Island are the country's main salt water bathing experience, in purpose built facilities. This facility managed by a CCO under direction of Tauranga City Council regularly attracts 250,000 to 300,000 annual visits and records annual operating surpluses of in excess of $500,000 to $750,000.

The Ocean Blue Spa in Napier is the other main salt-water chlorinated facility in New Zealand we are aware of but as, it is operated by a commercial management company, we are not certain of usage or business outcomes. The St Clair Salt Water Pools at Dunedin are only operated as a standard swimming pool and do not offer hot salt pool soaking.

Key success factors for such a facility will be the cost of piping and heating the salt water to the pools and the cost of water discharge. If the site is a significant distance from the salt-water source (greater than 0.5km) this could make it unviable, as the costs to construct piping and pumping would increase significantly.

If the heating source were also from a traditional method and not geothermal then annual operating costs would increase significantly.

In our opinion the outdoor spas would be better placed at a combined centre in New Brighton or the East Precinct as they have a stronger synergy and link to an outdoor coastal experience than being provided at the Metro Centre.

If the spas can be developed at a coastal site in association with other facilities then we also recommend that a Wellness Centre be considered. Such a centre would add considerable profitable activities that work well with signature spas. SGL has been involved with the successful Hanmer Springs Wellness and Spa Centre as well as feasibility reviews on wellness facilities in Rotorua, Mount Maunganui Hot Salt Water Pools, Queenstown and Dunedin in New Zealand and also at Moree in New South Wales.

The development of an iconic coastal spa and wellness centre linked to aquatic facilities and water play and waterslides would provide a significant point of difference for this centre. It would also present an excellent marketing opportunity to link with Hanmer Springs to package services to tourists who may be interested in visiting both centres.

### 5.2.6 Likely Private Investment in Water Park or Associated Facilities

Our project review supports the best opportunity is to package all proposed facilities at the one site in the north east area. The new Metro Sport Centre will become the city wide facility attracting visits across a 10 kilometre catchment radius but this still leaves a significant gap for a district facility in the north east.

The project brief also asks the consultant team to comment on the likelihood of a private investor developing say a water park or hot pool facilities. In our industry experience usually the high cost of operating public aquatic facilities on land that cannot be owned is seen as a major obstacle to attracting private investment to such projects.

The addition of commercial activities such as health and fitness, waterslides and water play, spas and wellness facilities all assist in attracting higher yield customers, which in turn assist with reducing operating losses and can also contribute to operating profits. If a private investor was encouraged to set up a facility in the area they will look to developing the most commercial activities and steer away from any high loss operations such as large water pools and competition facilities.

We would support the development of all proposed facilities at the best aquatic leisure centre site in the north east.

Splitting up the profitable activities to a different centre to attract a commercial investment option say in the New Brighton Town Centre is not recommended as there is no guarantee such a development will be attractive whilst it is likely the split in users will impact on the viability of both options.

There may be some opportunities as proposed (suggested dual flow rider funded by others) to attract commercial investment for some features of the development but we would recommend they be reviewed as part of a combined development and not a split site operation.

The combined regional population and tourism visitation numbers are not expected to be sufficient enough to attract a developer to invest in waterpark facilities. With only 17 waterparks located throughout Oceania and only 5 of these in New Zealand it is very unlikely that Christchurch and the Canterbury region with low regional population (compared to what water park developers are looking for) and low average daily temperatures would attract a major water park investor.

## 5.3 FACILITY DEVELOPMENT OPTIONS REVIEW

The following provides a summary of each of the development options identified within the project brief or developed during the review process. The nine (9) options that have been analysed include:

- Option 1: No Waterpark and ER&S Facility located elsewhere in the East.
- Option 2: Waterpark Combined with the ER&S Facility in New Brighton
- Option 3: Waterpark only in New Brighton and ER&S Facility located elsewhere
- Option 4: Council ER&S Facility only in New Brighton
- Option 5: "Full" Village in a Waterpark
- Option 6: Boutique Salt Water Pool in New Brighton to complement ER&S Facility elsewhere.
- Option 7: All Aquatic Entertainment elements in New Brighton and a reduced scale/fitness orientated ER&S Facility elsewhere.
- Option 8: Scaled down "Village" option
- Option 9: ER&S Facility plus Boutique Salt Water Pool and Day Spa in a Coastal Location in the East

The options have been assessed against the following key issues:

- Likely site/development area take up
- Likely capital cost range
- Catchments and visitation ranges
- Impact on proposed aquatic network
- Other comments

It should be noted when reviewing the data contained in the table that the range of development options do not have detailed feasibility or business plans completed and no sites and final development or capital costs are confirmed.

This has therefore required SGL to make a range of general assumptions that have been developed to compare the various options.

This information therefore should be used as a guide to determine best range of options for then recommended detailed design, site reviews, capital costs, feasibility and business planning. Following completion of this work more detailed development option analysis can occur.

**Table 5.2**
**Potential Development Options Review**

| Option Name | Description | Estimated Area Take up | Capital Cost Range | Likely Catchment / Visitations | Impact on Proposed Aquatic Network | Other comments |
|---|---|---|---|---|---|---|
| **Option 1: No Waterpark, ER&S Facility located elsewhere in the East** | Option includes: Development of the ER&S located elsewhere in the north including:<br>• 25m lap pool<br>• 33m lap pool<br>• learn to swim pool<br>• Leisure facility spa, aqua play and hydro slides.<br>• Multi purpose Group fitness room.<br>• Indoor sport courts x (3) | • ER& S building area between 6,500m² and 7,500m²<br>• Car park and outdoor areas and landscape buffer say 12,000m²<br>• Total development area say 20,000m² to 22,000m² | • Estimated capital cost allowance $37.000M subject to final site development and acquisition costs | • Likely primary catchment (0kms to 5kms) population is 77,431 people.<br>• Likely centre visitations range 530,000 to 650,000 based on 6.9/visits to 8.3/visits (CCC primary catchment visit aver.).<br>• Allowance for extra visits due to $6.5m of waterslides and water play so high user catchment = 780,000 to 900,000 visits | • Provides the northeast area with replacement facility for a range of former QE11 aquatic facility users.<br>• Complements the new Metro Sports Centre that becomes the City Wide Major Aquatic and Leisure Facility.<br>• Detailed catchment analysis needs to be completed once final site chosen. | • Final site will impact on final capital cost.<br>• To attract maximum users need to locate facility off main road or high profile location preferably close to a shopping centre or major commercial zone. |
| **Option 2: Waterpark combined with ER&S Facility, in New Brighton** | Option includes:<br>• 25m x 25m formal pool<br>• 1 learn to swim pool 25m x 12.5m<br>• 1 learn to swim pool with moveable floor 25m x 12.5m<br>• Gymnasium<br>• Group fitness room<br>• Foyer/reception<br>• Café<br>• Change rooms<br>• Housed in Sprung Instant Structure<br><br>Water park features including:<br>• Double flow rider'<br>• Super bowl variant<br>• Rattler | • Waterpark and ER&S building area between 11,000m² and 12,000m²<br>• Car park and outdoor areas and landscape buffer say 14,000m² to 18,000m²<br>• Total development area say 25,000m² to 30,000m² | • Estimated capital cost by proponents was $34.7M but SGL estimate based on full development costs likely to be $47M to $50M subject to final site development and acquisition costs | • Likely primary catchment (0kms to 5kms) population is 77,431 people @ 6.9visits/person = 530,000 to 650,000.<br>• Secondary catchment for waterpark from 5kms to 15kms is approximately 268,921 people.@ 1 to /2 visits = 270,000 to 540,000.<br>• Regional and tourist visits say 50,000/year<br>• Likely waterpark and ER&S visitations range from 800,000 to 1,190,000 visits/yr. | • Provides the northeast area with replacement facility for a range of former QE11 aquatic facility users.<br>• Potential accessibility issues for new growth areas.<br>• Waterpark will need to draw large secondary catchment area plus tourists so be a direct competitor facility for the leisure components planned for the new Metro Sports Centre | • Shared management costs at one site.<br>• Share marketing costs at one site.<br>• Shared infrastructure and services at one site<br>• High yield components will assist the financial sustainability of the centre.<br>• Potential to return annual operating surplus (before depreciation and cost of capital).<br>• Higher spend per user compared to other options identified |

| Option Name | Description | Estimated Area Take up | Capital Cost Range | Likely Catchment / Visitations | Impact on Proposed Aquatic Network | Other comments |
|---|---|---|---|---|---|---|
| | • Boomerango<br>• River/Lagoon/beach entry<br>• Aqua play 1750TB<br>• Outdoor spas<br>• Housed in a retractable roof "Open Air" Structure. | | | | | |
| **Option 3: Waterpark only in New Brighton, and ER&S Facility located elsewhere** | Option includes:<br>ER&S facility located elsewhere in the east.<br>• 25m lap pool<br>• 33m lap pool<br>• learn to swim pool<br>• Leisure facility spa, aqua play and hydro slides.<br>• Multi purpose Group fitness room.<br>• Indoor sports courts (3).<br><br>Water park in New Brighton including:<br>• Double flow rider'<br>• Super bowl variant<br>• Rattler<br>• Boomerango<br>• River/Lagoon/beach entry<br>• Aqua play 1750TB<br>• Outdoor spas<br>• Housed in a retractable roof "Open Air" Structure.<br>• $6.5M for water features moves to Water Park. | • Waterpark area between 6,000m² and 7,000m²<br>• Waterpark Car park and outdoor areas and landscape buffer say 14,000m² to 18,000m²<br>• Total waterpark development area say 20,000m² to 25,000m² .<br>• ER&S building area between 5,000m² and 6,000m²<br>• Car park and outdoor areas and landscape buffer say 10,000m²<br>• Total ER&S development area say 16,000m²<br>• Combined 2 facility development area required approx. 36,000m² to 41,000m² . | • Estimated capital cost of the waterpark say $22M to $25M subject to development and acquisition costs.<br>• Estimated cost for the ER&S Facility is $30.5M.<br>• Combined two facility development cost around $53M to $56M | • Likely waterpark primary catchment (0kms to 5kms) population is 77,431 people @ 3 visits/person =232,000.<br>• Secondary catchment for waterpark from 5kms to 15kms is approximately 268,921 people.@ 0.5 to 1 visit = 130,000 to 270,000.<br>• Regional and tourist visits say 50,000/year<br>• Likely waterpark visitations range from 410,000 to 550,000 visits.<br>• ER&S Facility visits say 77,431 people in primary catchment zone x 6 visits/year = 460,000 to 500,000.<br>• Combined 2 facility visits estimated at 870,000 visits to 1,050,000 visits. | • Provides the northeast area with replacement facility for a range of former QE11 aquatic facility users.<br>• Waterpark will need to draw large secondary catchment area plus tourists so be a direct competitor facility for the leisure components planned for the new Metro Sports Centre. | • Double up on management costs at 2 separate sites.<br>• High capital cost item with split development.<br>• Splitting high yield facility components will decrease visitations and the level of revenue to both facilities impacting on the financial viability of the Centre.<br>• The lack of "attractor" facilities at the E, R and facility will result in Council subsidising the operations.<br>• Lower spend per visit at ER&S Facility. |

| Option Name | Description | Estimated Area Take up | Capital Cost Range | Likely Catchment / Visitations | Impact on Proposed Aquatic Network | Other comments |
|---|---|---|---|---|---|---|
| | | | | | | |
| **Option 4:**<br>**Council ER&S Facility only, in New Brighton** | Option includes:<br>ER&S facility located in New Brighton.<br>• 25m lap pool<br>• 33m lap pool<br>• learn to swim pool<br>• Leisure facility spa, aqua play and hydro slides.<br>• Multi purpose Group fitness room.<br>• Indoor sports courts (3).<br>• No water park | • ER& S building area between 6,500m² and 7,500m²<br>• Car park and outdoor areas and landscape buffer say 12,000m²<br>• Total development area say 20,000m² | • Estimated capital cost allowance $37.000M subject to final site development and acquisition costs | • Likely primary catchment (0kms to 5kms) population is 77,431 people.<br>• Likely centre visitations range 530,000 to 650,000 based on 6.9/visits (CCC primary catchment visitation average).<br>• Extra water features expected to add between 250,000 and 350,000 visits.<br>• Total annual visits 780,000 to 900,000. | • Provides the northeast area with replacement facility for a range of former QE11 aquatic facility users.<br>• Complements the new Metro Sports Centre that becomes the City Wide major Aquatic and Leisure Facility | • Helps revitalise New Brighton area if suitable site can be found.<br>• Note catchment assumptions are the same wherever located in 5 km catchment zone due to lack of competing centre and away from Metro Sports 10 km catchment zone<br>• Further refinement required as part of detailed site analysis. |
| **Option 5:**<br>**Full 'Village in a Waterpark'** | Option includes:<br><br>Village in a Water Park" concept including a number of smaller scale aquatic facilities distributed around the edge of the centre and complementing the existing seas and river attractions including:<br>• Boardwalks/coastal promenade<br>• Outdoor pools – salt water hot pool.<br>• Mixed use buildings & beach front interaction<br>• Shopping markets<br>• River rides<br>• Fun park<br>• White water course | • No details except for visual drawings and concept photos so not able to identify area take up until concept id further developed and areas allocated per development. | • No details provided and not able to estimate cost until development scope is conformed. | • No details provided to allow an assessment. | • Split facilities goes against current industry trends of clustering and connecting community aquatic and leisure facilities to improve use and viability | • Option is to broad a concept to allow comparative assessment at this stage.<br>• Likely to be one of the least viable options as splitting development funds across a range of projects and requiring people to move between facilities for different interests<br>. |

| Option Name | Description | Estimated Area Take up | Capital Cost Range | Likely Catchment / Visitations | Impact on Proposed Aquatic Network | Other comments |
|---|---|---|---|---|---|---|
| | | | | | | |
| **Option 6: Boutique salt water pool in New Brighton, to complement an ER&S Facility elsewhere** | Option includes: ER&S facility located elsewhere in the east.<br>• 25m lap pool<br>• 33m lap pool<br>• learn to swim pool<br>• Leisure facility spa, aqua play and hydro slides.<br>• Multi purpose Group fitness room.<br>• Indoor sports courts (3).<br>• Boutique salt water hot pools located on the New Brighton foreshore adjacent to the surf club | • ER&S facility located in another location.<br>• Boutique saltwater pools with change and reception etc. based on drawing say 1,000m² development plus car parking and access of say 3,000m² so say 4,000m² for total development.<br>• Possibly linked to Surf Club | • Estimated capital cost say $4.5M to $5M including site development costs | • Specialist facility for locals and visitors to the area.<br>• Based on Mount Maunganui Hot Pools attract say 180,000 to 200,000 visits year | • Minimal impact on ER&S facility and Metro Sports Centre as specialist facility | • High cost of management and reception for low usage facility.<br>• Need to consider allied business such as food and beverage and retail areas.<br>• Development of day spa and wellness centre also adds improved commercial returns as link well to salt water pools<br>• Coastal location will have environmental and resource consent issues to resolve. |
| **Option 7: All aquatic entertainment elements in New Brighton, and a reduced scale/fitness oriented ER&S Facility elsewhere** | This option includes:<br><br>Water park in New Brighton as per option 3.<br><br>Salt water hot pools in New Brighton.<br><br>ER&S facility with dry components only including:<br>• Multi purpose Group fitness room.<br>• Indoor sports courts (3). | • ER&S facility located in another location and only providing dry activity areas.<br>• Boutique saltwater pools with change and reception etc. linked to aquatic entertainment areas say 9,000m² development plus car parking and access of say 10,000m² so say 19,000m² to 20,000m² for total development.<br>• ER&S Facility say 3,500m² plus car parking 10,000m² = 13,500m²<br>• Total combined area = | • Estimated capital cost of the waterpark say $22M to $25M subject to development and acquisition costs.<br>• Estimated cost for the ER&S Facility is $17.5M.<br>• Estimated capital cost of hot slat water pools is $4.5M<br>• Combined facilities development cost around $44M to $48M | • Likely waterpark primary catchment (0kms to 5kms) population is 77,431 people @ 3 visits/person =232,000.<br>• Secondary catchment for waterpark from 5kms to 15kms is approximately 268,921 people.@ 0.5 to 1 visit = 130,000 to 270,000.<br>• Regional and tourist visits say 50,000/year.<br>• Likely hot salt water pools 180,000 to 200,000<br>• Likely waterpark and | • Waterpark would be direct competitor the Metro Sport Centre leisure and water play facilities. | |

| Option Name | Description | Estimated Area Take up | Capital Cost Range | Likely Catchment / Visitations | Impact on Proposed Aquatic Network | Other comments |
|---|---|---|---|---|---|---|
| | | 33,500m² + | | salt water pools visitations range from 590,000 to 750,000 visits.<br>• ER&S Facility visits say dry only at 40% of use = 280,000 to 350,000<br>• Combined 2 facility visits estimated at 870,000 visits to 1,050,000 visits. | | |
| **Option 8**:<br>**Scaled down 'Village' Option** | This option includes:<br>Smaller "village' option 5 and includes funding a number of smaller scale aquatic attractions adjoining New Brighton commercial core. | • Same as option 5 | • Overall costs however would be unknown at this stage. | • Not able to be estimated | N/A | • Likely to be one of the least viable option as splitting development funds across projects requiring users to move between facilities. |
| **Option 9:**<br>**ER&S Plus Hot Salt Pools and Day Spa on Coastal Location Site** | Option includes:<br>ER&S facility located on a coastal site.<br>• 25m lap pool<br>• 33m Learn to swim pool.<br>• 33m Moveable floor pool<br>• Leisure facility spa, aqua play and hydro slides.<br>• Multi purpose Group fitness room.<br>• Indoor sports courts (3).<br>• Boutique salt water hot pools<br>• Day Spa and Wellness Centre | • ER& S building area between 6,500m² and 7,500m²<br>• Hot saltwater pools 1,200m² and day spa and wellness centre 1,000m² so total development 2,200m²<br>• Car park and outdoor areas and landscape buffer say 14,000m²<br>• Total development area say 22,000m² to 23,000m² | • Estimated ER&S capital cost allowance $37.000M subject to final site development and acquisition costs.<br>• Hot saltwater pools $4.5M and Day Spa/Wellness Centre say $3.5M so total cost $8M.<br>• Combined development site costs say $45M | • Likely primary catchment (0kms to 5kms) population is 77,431 people.<br>• Likely centre visitations range 650,000 to 720,000 based on 8.3 to 9.3/visits (CCC primary catchment average).<br>• Salt water pools visits 180,000 to 200,000.<br>• Day spa/wellness visits say 10,000/year<br>• Total annual visits 970,000 to 1.110M visits/year. | • Provides the northeast area with replacement facility for a range of former QE11 aquatic facility users.<br>• Complements the new Metro Sports Centre that becomes the City Wide major Aquatic and Leisure Facility | • SGL proposed option if aim is to develop a coastal aquatic leisure centre that will also attract visitors to the area |

### 5.3.1 Future Development Options Summary

The following table summarises the key assessment reviews for each of the 9 facility options.

**Table 5.3**
**Potential Development Options Review Summary**

| Option Name | Estimated Area Take up | Capital Cost Range | Likely Catchment/ Visitations | Impact on Proposed Aquatic Network |
|---|---|---|---|---|
| **Option 1: No Waterpark, ER&S Facility located elsewhere in the East** | • Total development area say 20,000m² | • Estimated capital cost allowance $37.000M subject to final site development and acquisition costs | • Total annual visits 790,000 to 900,000 | • Provides the northeast area with replacement facility for a range of former QE11 aquatic facility users.<br>• Complements the new Metro Sports Centre that becomes the City Wide major Aquatic and Leisure Facility |
| **Option 2: Waterpark combined with ER&S Facility, in New Brighton** | • Total development area say 25,000m² to 30,000m² | • Estimated capital cost was $34.7M but SGL estimate based on full development costs likely to be $47M to $50M subject to final site development and acquisition costs | • Likely waterpark and ER&S visitations range from 800,000 to 1,190,000 visits/yr. | • Provides the northeast area with replacement facility for a range of former QE11 aquatic facility users.<br>• Waterpark will be a direct competitor facility for the leisure components planned for the new Metro Sports Centre. |
| **Option 3: Waterpark only in New Brighton, and ER&S Facility located elsewhere** | • Total waterpark area, 20,000m² to 25,000m² .<br>• Total ER&S area say 16,000m²<br>• Combined 2 facility area 36,000m² to 41,000m² . | • Estimated capital cost of waterpark say $22M to $25M.<br>• Estimated cost for the ER&S Facility is $30.5M.<br>• Combined two facility cost around $53M to $56M | • Likely waterpark visitations from 410,000 to 550,000 visits.<br>• ER&S Facility visits say 460,000 to 500,000.<br>• Combined 2 facility visits 870,000 visits to 1,050,000 visits. | • Provides the northeast area with replacement facility for a range of former QE11 aquatic facility users.<br>• Waterpark draws large secondary catchment area + tourists so direct competitor facility for Metro Sports Centre. |
| **Option 4: Council ER&S Facility only, in New Brighton** | • Total development area say 20,000m² | • Estimated capital cost allowance $37.000M subject to final site development and acquisition costs | • Total annual visits 780,000 to 900,000. | • Provides the northeast area with replacement facility for a range of former QE11 aquatic facility users.<br>• Complements the new Metro Sports Centre that becomes the City Wide major Aquatic and Leisure Facility |
| **Option 5: Full 'Village in a Waterpark'** | • No able to be assessed. | • No details provided and not able to estimate cost until development scope is confirmed. | • No details provided to allow an assessment. | • Split facilities goes against current industry trends of clustering and connecting community aquatic and leisure facilities |
| **Option 6: Boutique salt water pool in New Brighton, ER&S Facility elsewhere** | • Development plus car parking and access of say 3,000m² to 4,000m² | • Estimated capital cost say $4.5M to $5M including site development costs | • Specialist facility for locals and visitors to the area.<br>• Attract say 180,000 to 200,000 visits year | • Minimal impact on ER&S facility and Metro Sports Centre as specialist facility |
| **Option 7: All aquatic entertainment elements in New Brighton, and a reduced scale/fitness oriented ER&S Facility elsewhere** | • Say 19,000m² to 20,000m² for total development.<br>• ER&S Facility say 3,500m² plus car parking 10,000m² = 13,500m²<br>• Total combined area = 33,500m² + | • Estimated capital cost of waterpark say $22M to $25M<br>• Estimated cost ER&S Facility $17.5M.<br>• Estimated cost of salt water pools $4.5M<br>• Combined facilities development cost around $44M to $48M | • Combined 2 facility visits estimated at 870,000 visits to 1,050,000 visits. | • Likely North East area residents have to travel to Metro Sports Centre for swimming activities.<br>• Waterpark would be direct competitor the Metro Sport Centre leisure and water play facilities. |

| Option Name | Estimated Area Take up | Capital Cost Range | Likely Catchment/ Visitations | Impact on Proposed Aquatic Network |
|---|---|---|---|---|
| **Option 8: Scaled down 'Village' Option** | • Same as option 5 | • Not able to be determined as final options need to be confirmed | • Not able to be estimated | • Not recommended as splits users |
| **Option 9: ER&S Plus Hot Salt Pools and Day Spa on Coastal Location Site** | • Total development area say 22,000m² to 23,000m² | • Combined development site costs say $45M | • Total annual visits 970,000 to 1.110M visits/year. | • Provides the northeast area with replacement facility for a range of former QE11 aquatic facility users.<br>• Complements the new Metro Sports Centre that becomes the City Wide major Aquatic and Leisure Facility |

### 5.3.2 Future Development Options Overview

The project brief required a range of questions and issues to be investigated and reported on. It needs to be clearly noted that the proposals that have been investigated are very limited in scope and detail and do not have any feasibility, design, adequate site/development requirements, accurate capital costs or any business plans and financial modelling that can be assessed by our normal business review standards.

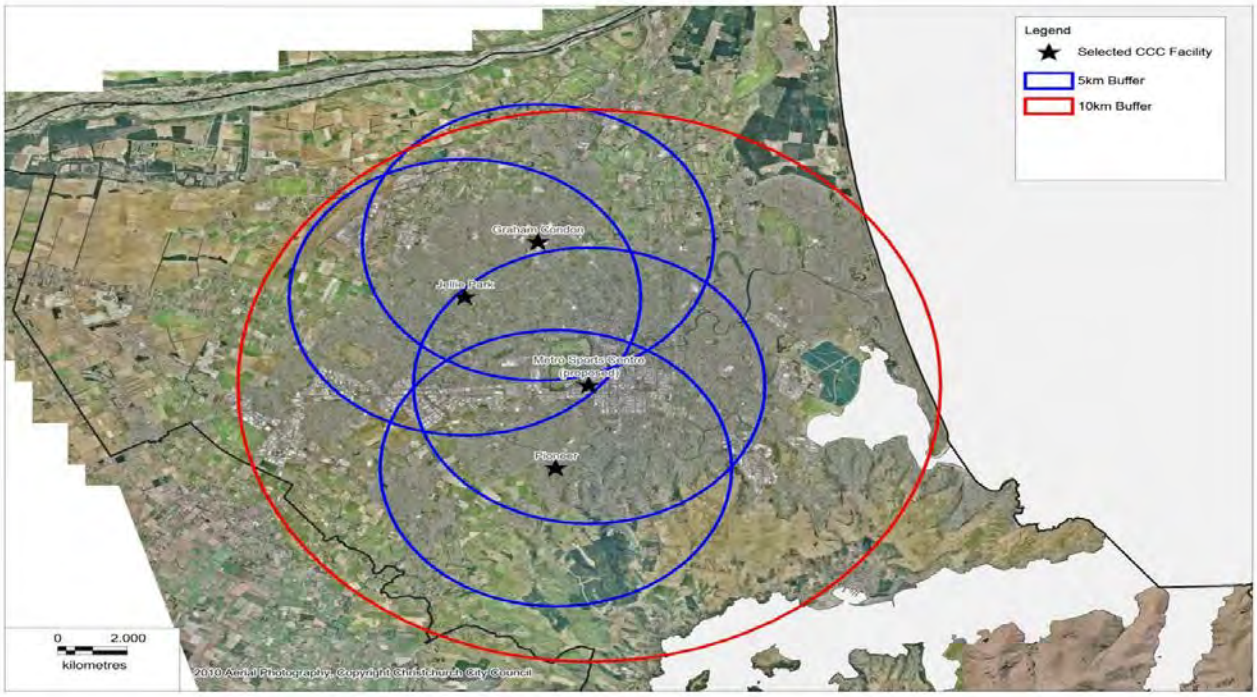
We note that the review is being conducted to try and identify the best future facility development options but the lack of detail has made it difficult to clearly separate the options that were required to be analysed.

To help us with some relevant benchmarks and industry trends that were used in the facility option assessment listed in table 5.2 we have:

- Reviewed previous CCC Aquatic facilities usage, user catchment analysis, revenue trends and operating performance (see sections 2.2 to 2.4).
- Reviewed the earthquake impacts on previous aquatic leisure facility provision and also the demographic catchments post the earthquake (see sections 1.4 and 2.3).
- Reviewed CCC future aquatic facility provision plans to familiarise ourselves with the proposed Metro Sport Centre and the Eastern Recreation and Sport Centre (ER & S Centre) – (see section 2.4.5).
- Reviewed a range of World Water Parks Association North American, Asian and Oceania Regional Water Park Trends (see section 4.2).
- Reviewed major New Zealand and Australian Aquatic facilities that have developed significant water play and waterslide development at traditional aquatic facilities (see section 4.2.10)

***This studies research finding has lead to confirming that with the operation of current open Council aquatic leisure facilities combined with development of the planned Metro Sport Centre will still be a gap in aquatic facility provision in the northeast of the city.*** These suburban areas (see table 2.6) are estimated to house approximately 80,000 residents and confirm there is capacity clearly for also the planned northeast district centre (The planned ER&S facility) plus the Metro Sport Centre.

The catchment analysis map (listed on the following page) highlights that the northeast area through to the east coast area of New Brighton etc. falls within the secondary catchment (red circle) of the planned Metro Sport Centre and no other current Christchurch City Council Aquatic Centre primary catchment covers these suburban areas.




These findings have allowed us to confirm the proposed development strategy of the new Metro Sport Centre in association with the ER&S Facility will provide the best option replacement facilities for the closed down QE11 and Centennial Pool) to enable the pre-quake high aquatic facility attendances of 4.7M recorded across the CCC Aquatic facility network to be reinstated.

The inclusion of significant water play, waterslides and leisure water features at both of the planned centres is strongly recommended as industry trends clearly indicate the largest market of aquatic users visit centres for recreation/fun/leisure/entertainment and socialisation. Locating such facilities at the one site with fitness and competition, learn to swim and warm water program pools plus health and fitness and indoor sport facilities provides opportunities to maximise attraction to all main user markets.

Placing such facilities at different locations throughout the area reduces the centres usage and viability and doubles up on management and operation costs.

The idea proposed of a waterpark in the New Brighton area certainly has merit but the low population base of the Christchurch area (in relation to the high populations needed to make waterparks viable) plus low average monthly temperatures (compared to the most used waterparks) would indicate this is a concept that the commercial investment world would not support. Development of the Metro Sport Centre and a major waterpark also in the Christchurch City area is not supported as both facilities will complete directly against each other as they require large population catchment zones.

The study's findings indicate that the addition of $6.5m for water play and waterslides at the ER&S Facility will provide a significant budget for leading edge indoor water slide/ride and water play features and that the many outcomes proposed by the waterpark project proponents will be able to be achieved at the ER&S facility.

The aquatic facility catchment analysis indicates such a development could be located near the coast and this could help theme the centre plus also consider the addition of high revenue earning and significant visitor/tourist facilities such as hot salt water pools, day spas and wellness facilities.

The difficult issue is finding an adequate development site of between 20,000m² and 25,000m² to house such a major facility development.

Based on the study's findings SGL recommends the following strategy directions:

- That Council develop a combined facility that includes the components of the ER&S Facility, major leisure/water features/attractor and also a coastal location salt water pools and wellness centre (subject to site attractiveness and capacity).

- The facility should aim to attract approximately 970,000 to 1.100M+ visits (local and regional/interisland and international) per annum and final components should complement the proposed facilities, services and programs at the new Metro Sport Centre whilst also creating a coastal visit centre point of difference.

- A notional area of 20,000m² to 25,000m² should be allowed for the proposed development of the facility and associated car parking, landscape buffer zones and future extension zones with a clear priority to locate if possible within close proximity to an easily accessible main roads, retail and commercial areas.

- If Council wishes to use this development to also revitalise a coastal retail zone this should be part of the site selection criteria.

- That Council complete detailed feasibility and develop a final component brief to determine the size and priority facility components as a means of assessing potential capital and operating costs of such a development.

- As part of this feasibility site visits should be made to industry leading New Zealand and Australian aquatic leisure facilities with major waterslide and water play areas as highlighted in table 4.6 of this report) to ensure the lessons learnt from their design, best high user attractor components and operational issues be identified.

- That Council undertake detailed site assessments of the available site options to identify a preferred site or sites for more detailed assessment.

- That the New Brighton Water Park proponents be congratulated and thanked for their work on raising community awareness on this issue and they be kept informed and consulted on the facility development as it progress through these planning and development phases.

# APPENDIX ONE WATERPARK INDUSTRY REFERENCES

The following key documents have been used in relation to reviews of waterpark trends:

- 2011 Theme Index – Global Attractions Attendance Report – TEA/AECOM Economics copyright 2012.
- Worldwide Waterpark Association – Waterpark Industry General Facts 2012 – copied from website – www.waterparks.org
- Waterpark Resorts Supply and Demand 2013 Update – David J Sengree - Hotel and Leisure Advisors LLC – Paper presented 14th January 2013.
- Range of waterpark websites as acknowledged table 4.5.

ATTACHMENT 2. SGS ECONOMICS & PLANNING REPORT
EVALUATING REVITALISATION POTENTIAL

# New Brighton Master Plan / Waterpark

## Economic advice – FINAL REPORT

Christchurch City Council
August 2013

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# INTRODUCTION

Independent insight.

# 1 INTRODUCTION

**Overview**

This section explains the purpose of this report. It recaps the history of the New Brighton Master Plan and Waterpark initiatives before outlining the brief of work given to SGS

## 1.1 The changing fortunes of New Brighton

New Brighton is one of nine Key Activity Centres (KACs) distributed across Christchurch City. While most of these centres service a region wide or sub-regional trade area, New Brighton currently performs a neighbourhood focussed role.

This was not always so. New Brighton was one of the first centres in New Zealand freed to trade on weekends. For many years it drew domestic trade from across the region as well as from out of town tourists. New Brighton carved out a role as a shopping 'destination' and the centre's retail offer and floorspace grew commensurately.

With the general freeing up of shop trading hours, shifts in retail business models ('category killers' and the like) and changing shopping behaviours flowing from labour market deregulation, the trading fortunes of New Brighton took a sharp downward turn. Today the centre is demonstrably over-sized for its trade area. Around $8 in every $10 of retail spending generated within the New Brighton district flows out to other centres in the metropolitan region.[1] There is clear evidence of under-trading in the high vacancy rates, poor shop upkeep and presentation and general lack of vitality and footfall in the mall.

Significant investments in community infrastructure, including the construction of a new library and new promenade pier on the foreshore, have failed to arrest this decline in the trading performance of New Brighton.

New Brighton's trading issues have been exacerbated by the earthquakes. Significant parts of the centre's core catchment have been red zoned. The Central Brighton School, which generates some traffic into the Centre, is slated to close as part of a merger strategy. Meanwhile, revitalisation and re-invention of the retail offer of the Central City will inevitably pose strong competition for all regional centres, including New Brighton, as the central city is *intended to* regain a primary role in the centre hierarchy (Christchurch Council Plan 2013).

Against this background, commercial land owners and the general community in New Brighton have seized the opportunity offered by the post quake reconstruction effort to press for a major repositioning of the centre with a view to securing an expanded and robust trading base. A key community initiative has been promulgation of the Waterpark concept. This envisages a major water sports and leisure facility embedded within a re-framed New Brighton shopping centre. The Waterpark aims to reinstate New Brighton as a pre-eminent leisure destination for Canterburians and tourists alike, bringing new spending to the area and providing the impetus and confidence for current traders to re-energise their own businesses.

[1] Property Economics Report (2012).

In a variation on this theme, the New Brighton Business & Landowners Association is promoting the concept of a 'village in the waterpark' (referred to in this report as the 'Village option'). This envisages a range of distributed attractions and urban design measures designed to make the most of New Brighton's seaside location, as distinct from promoting a single 'blockbuster' facility to draw more customers to the centre.

Some of the proposed attractions are potentially transitional in nature (specifically the concept of salt water lap pool and leisure pools between the surf club and the whale pool) and able to be moved to another location in time, if desired.

Running alongside these community and investor driven campaigns have been the Christchurch City Council's own planning processes. These include land use rationalisation, infrastructure upgrades and urban design measures as documented in the Draft New Brighton Centre Master Plan and the preparation of investment strategies for aquatic facilities across the City as a whole. These investment strategies include construction of a regional level aquatic sports and leisure asset in central Christchurch and the provision of a community level aquatic centre to service the eastern metro region (known as the Eastern Recreation and Sports (ER&S) Facility).

The aspirations of the New Brighton community and landowners need to be reflected in the Master Plan in a way that is practical, logical in the context of the bigger regional picture and effective in terms of genuinely boosting the trading prospects of the centre.

Against this background, SGS's brief identifies a range of development options for New Brighton, with reference to the Waterpark concept and variations on this theme:

- A Waterpark in New Brighton that incorporates a Council ER&S Facility (noting that an ER&S Facility would include other non-aquatic facilities such as fitness centre, basketball courts, etcetera);
- A New Brighton Waterpark, additional to a Council ER&S Facility located elsewhere in the East of the City;
- A Council ER&S Facility only (i.e. no New Brighton Waterpark), located either:
    - In New Brighton; or
    - Elsewhere in the East of the City
- A blend of locations and facilities – for example:
    - A boutique salt water pool in New Brighton to complement an ER&S Facility elsewhere;
    - All aquatic entertainment elements in New Brighton, and a reduced scale / fitness oriented ER&S Facility elsewhere.

During the course of the study, and aside from the seven different options mentioned in the brief (including the 'Village in the Waterpark' option discussed above), two other options were considered by Christchurch City Council and the SGL Consulting Group (who were engaged separately by Council to evaluate the economic feasibility of the options). These options were:

- An 'ER&S Facility plus' (i.e. adding coastal salt water pools and wellness centre within the proposed ER&S facility at one coastal location).
- A scaled back 'Village' option which involves the ER&S Facility 'landing' wherever is most logical to serve the needs of the East and redirecting some of the $6.5 million Earthquake Appeal Fund towards supporting smaller scale aquatic attractions in New Brighton. This is a smaller scale version of full 'Village option'.

That is, in total, nine options were put forward on the table for consideration.

## 1.2 SGS's brief

SGS was commissioned by the Christchurch City Council to prepare report which:

1. *Identifies the current and longer term function and role of New Brighton Centre in the context of a post earthquake Christchurch, the city's wider planning environment and community aims for a revitalised centre and suburb.*

2. *Discusses the potential for an aquatic facility of varying scales (i.e. assessing the list of development options above) to provide a catalyst for revitalisation of the New Brighton commercial centre and its likely subsequent implications for its long term role and function.*

3. *Discusses the impact/effect of the New Brighton Waterpark and other development options (above) on the planned Metropolitan Sports Centre and central city revitalisation.*

4. *Discusses the potential for an aquatic facility of varying scales (i.e. assessing the list of development options above) to meet the Council's Community Outcomes.*

5. *Identifies the 'right size' of any private or publicly funded aquatic facility within New Brighton and the potential or otherwise for multiplier effects to revitalise the centre commensurate to its long term function, in light of demand levels and origin, employment and other relevant information. In particular this should address the proposed water theme park and its potential benefits, as well as any alternative aquatic developments including but not restricted to those development options identified above.*

6. *Identifies the key interventions for New Brighton that will support its sustainable contribution, as a key suburban centre, to the eastern communities of Christchurch, focussing on but not necessarily limited to, provision of aquatic facilities.*

# CURRENT ROLE OF NEW BRIGHTON

Independent insight.

# 2 THE CURRENT ROLE OF NEW BRIGHTON

**Overview**

This section reviews the trade area and retail performance of the New Brighton centre. Based on desk top research it identifies the centre's principal strengths and weaknesses.

## 2.1 The Property Economics report

Presently, the New Brighton centre primarily performs a convenience and supermarket type function (with some recreational / tourism retailing given its unique beachside location), along with some core commercial and community services.

New Brighton's historical position as the first centre in New Zealand to trade on Saturdays / Sundays resulted in the centre being developed for a market well beyond its current trade catchment. Over a fifth of stores in New Brighton (22 stores or around 21% of GFA) are currently vacant with the quality of the stores compounding the 'vacancy' problem. This lack of retail quality is a major factor contributing to the high level of retail escape expenditure from the centre amounting to 81 per cent.

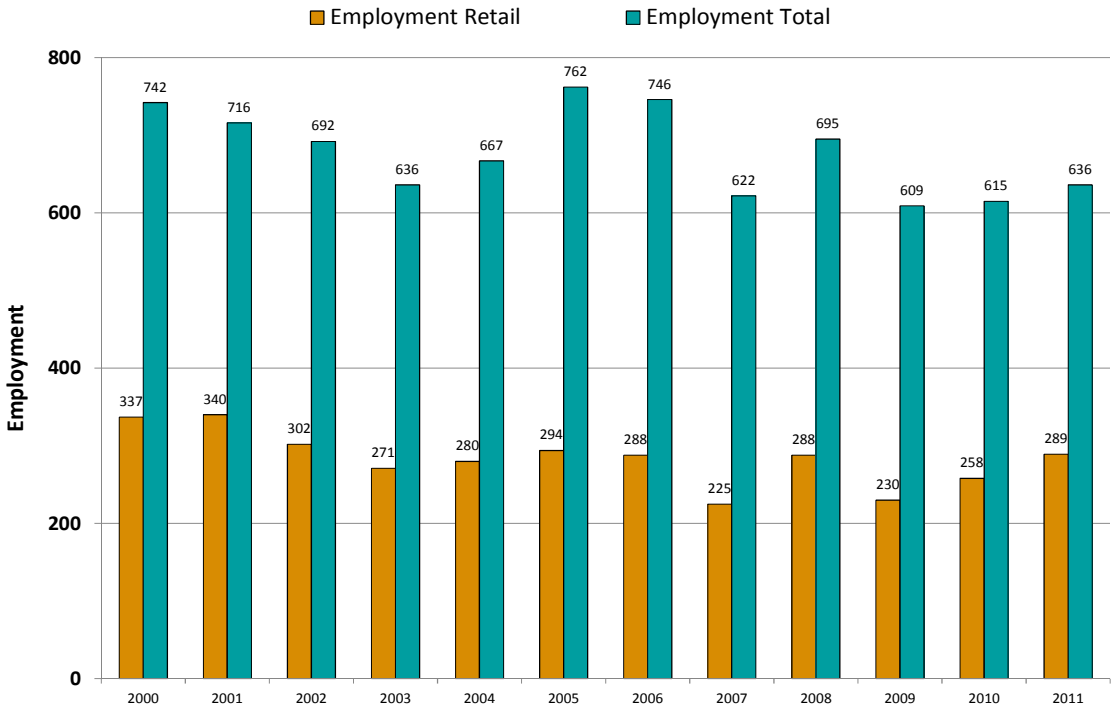
Unsurprisingly, retail employment in the New Brighton centre continued on a downward trend since the turn of the century up until 2011, falling from ~340 to ~290[2]. This fall in retail employment was also accompanied by a marginal fall in commercial-related employment in the centre over the same timeframe.

Whilst retail trends in the New Brighton centre itself reflect the trends of the host region (retail employment in the catchment of New Brighton Centre also fell over this timeframe), retail employment in Christchurch as a whole grew quite rapidly over this timeframe.

There was a turnaround evident though in retail related employment just before the earthquakes (refer Figure 1).

[2] Property Economics, New Brighton Economic Assessment, 2012

**FIGURE 1.** EMPLOYMENT IN NEW BRIGHTON




Source: SGS Economics & Planning analysis based on Property Economics, New Brighton Economic Assessment, 2012

M.E Spatial prepared the 'Urban Growth Analysis for Land Use Recovery Plan' for the Christchurch Earthquake Recovery authority in February 2013. The report presents an assessment of possible growth outcomes for greater Christchurch. The report notes that growth in activity (business units and employment) was evident across the centres network and business areas generally over the 2000 to 2010 period. Only 3 centres showed a decline (including Hornby as a consequence of the loss of major transport sector activity, and New Brighton in the face of strong competition).

The New Brighton Draft Masterplan[3] also identifies the current weaknesses of New Brighton which are affecting its functioning and overall economic performance. These include:

–A lack of identity or 'point of difference';

–Long, monotonous blocks of building;

–The poor relationship and connections between buildings and public spaces / car parking areas;

–A lack of an integrated transport interchange;

–Weak connectivity between the centre and the river, sea and parks; and

–Concerns regarding safety and vandalism.

Future prospects for the centre (if it continues to function in its current capacity) remain bleak too as evidenced by the following yardsticks:

–The centre's current retail catchment represents around 4% of all households in Christchurch City. Expectation is that this catchment is expected to grow at a rate less than a third of that anticipated for the wider Christchurch market over the 2012 to 2031 period, thereby resulting in a shrinking market share for the New Brighton trade area over time[4].

[3] Christchurch City Council, Draft New Brighton Centre Master Plan, 2012
[4] Property Economics, New Brighton Economic Assessment, 2012

–The Property Economics Economic Assessment of the New Brighton area considers anything 'higher order' to be commercially unrealistic and aspirational rather than practical given the retail offer in the surrounding centres.

Property Economics estimated projected retail turnover in the indicative core catchment for the New Brighton Centre. These turnover values (shown in the table below) represent the sales that stores within the catchment could **potentially** achieve given what the market can **potentially** sustain. Of particular relevance to proposed aquatic facilities in the centre is estimated spending on recreational goods and food in this core catchment.

**TABLE 1 NEW BRIGHTON CATCHMENT RETAIL EXPENDITURE FORECASTS ($M PA)**

| | 2012 | 2016 | 2021 | 2026 | 2031 | CAGR % 2012 – 31 p.a. |
|---|---|---|---|---|---|---|
| Food retailing | $68 | $71 | $74 | $77 | $81 | 0.9% |
| Recreational goods retailing | $7 | $7 | $7 | $8 | $8 | 0.7% |
| *Aggregated food & recreational good retailing* | *$75* | *$78* | *$81* | *$85* | *$89* | *0.9%* |
| TOTAL RETAILING | **$155** | **$162** | **$168** | **$178** | **$188** | **1.0%** |
| Total retailing LESS aggregated food & recreational retailing | $80 | $84 | $87 | $93 | $99 | **n/a** |

Source: Property Economics, New Brighton Economic Assessment, 2012
Notes: CAGR stands for compounded annual growth rate

Whilst the estimated food retailing and recreational goods retailing turnover is expected to grow modestly, it is evident that expectations are for these two elements to grow below par compared to total retailing turnover. The difference between the anticipated total retailing turnover and the consolidated food and recreational goods retailing turnover increases over time.

Indeed, the analysis indicates that the commercial centre of New Brighton is too large and should be significantly reduced in size.

## 2.2 Competitive positioning of New Brighton

Against these weaknesses, the Property Economics report identifies two points of strength for New Brighton's retail trade sector, these being:

–the potential for 'upside' and improved store productivity ($/sqm) within New Brighton centres is considerable.

–the recreational goods retailing sector had the highest level of retail retention at 45% despite New Brighton only having a few local surf shops classified in this sector.

The report recommended that any additional facilities / activities should be located in or around the New Brighton centre to maximise synergy between the land uses and New Brighton centre's relatively central location.

Additionally, the presence of other non-commercial activity located within the catchment of the centre, including the New Brighton Catholic School, Golf Course and Library, should be acknowledged in repositioning the centre.

The New Brighton Draft Master Plan[5] identifies a number of 'points of differences' which could be focused upon to give New Brighton a competitive position in the wider catchment. These included:

[5] Christchurch City Council, Draft New Brighton Centre Master Plan, 2012

–The beach and pier;

–Good quality cafes;

–Good services in the form of a post shop and banks;

–The natural environment, sea, sand dunes and river;

–Street furniture – the 'surf board seating'; and

–A strong, passionate and enthused local community.

The Master Plan introduces the 'big picture' themes that lead through to the specific actions. These themes address the main issues of the centre and include:

–Consolidation of the Centre through rezoning of land;

–Enhancing the flow of pedestrian and cycle routes to, through and around the centre;

–Development of precincts, entertainment, retail / commerce and residential while encouraging mixed use activities; and

–Reinforcing the river to sea link through the centre and connections to recreation spaces.

The plan notes that given its coastal positioning and relatively flat natural environment New Brighton is reliant on the built form to provide a sense of enclosure, and to define and shape the centre. It proposes to consolidate the centre toward the sea front and to rezone commercial land to the west of the centre for higher density residential activity, potentially including traveller's accommodation, which might help expand the current catchment of the centre.

The Draft Master Plan also includes a plan for residential development which aims to:

–Help offset the loss of residential catchment to the 'red zone';

–Provide vibrant residential accommodation close to the heart of the centre;

–Provide a range of accommodation types, including affordable accommodation, elderly housing, travellers accommodation and higher density housing; and

–Cater for existing residents, but also attract new people to New Brighton.

## 2.3 Longer term function and role for New Brighton

On the basis of its desktop review of the evidence, SGS concludes that New Brighton's future lies in a scaled back, community focussed retail role, coupled with a regional tourism oriented function. The former is a natural outworking of the centre's constrained catchment and the development of the district retailing network over the past two decades.

'Rolling back the clock' to New Brighton's hey-day as a regional shopping destination is in our view, impractical.

Having said that, New Brighton has a degree of cache, as a seaside destination, which with care and insight, can be leveraged to provide the centre with an expanded role and trading base.

The key intervention required in New Brighton is to reposition its 'brand' as a seaside village offering an array of entertainment, hospitality and retail leisure opportunities to complement its local service functions.

As explained in this report, this is likely to involve a number of distributed investments in New Brighton to:

–Improve the compactness and appeal of its retail core

–Introduce some new leisure attractions including but not limited to small scale aqua play facilities, fair grounds and enhanced promenades

–Improve the perceived safety of the centre's public domain through better street lighting , passive surveillance and the like

–Foster the development of an 'eat street or precinct' with strong pedestrian or visual connections to the sea.

To support these investments, a fresh marketing campaign for New Brighton is required. This should include a 'place making' program aimed at enlivening the centre during weekends and evenings in particular.

Our recommended strategy for New Brighton, focussed on repositioning the centre as a seaside leisure and hospitality attraction primarily for a regional clientele, would largely complement the tourism development strategy for central Christchurch. In this sense, the proposed investments in New Brighton should support economic development in the commercial core of New Brighton, and scale back the commercial area where considered feasible by existing retail and commercial strategies. Once the commercial core is revitalised, the benefits will automatically flow on to the periphery of the town centre. In other words, it is important that any aquatic facilities are located in, or, in close proximity to the commercial core of New Brighton. If the facilities are located away from the core, the spillover benefits may not be optimised.

# ECONOMIC IMPACTS OF AQUATIC LEISURE

# 3 ECONOMIC IMPACTS OF AQUATIC LEISURE

**Overview**

This section sets out a typology of water based leisure facilities ranging from local pools to major tourist attractions. Each category of facility is profiled in terms of catchment, visitor numbers, patron spend and known spillover effects within the facility or on the host neighbourhood.

## 3.1 Types of aquatic leisure facilities

After examining the available literature, we note that there is a hierarchy in the type of aquatic facilities from smaller ones that may only contain a single 25 metre outdoor pool through to larger facilities that include a variety of specialised pools used for different purposes, other water and non-water recreation activities as well as a range of retail facilities.

The aquatic facilities at the smaller end of the spectrum may serve a local community, such as a grouping of suburbs. In contrast, the larger and more specialised facilities can cater to the needs of a large metropolitan area right through to national and international tourists.

Using a range of sources from Australia and New Zealand, SGS has categorised the various types of aquatic leisure facilities into the following hierarchy:

–Local or community aquatic centres;

–District/ sub-regional aquatic centres;

–Regional / metropolitan aquatic centres; and

–Tourism-oriented aquatic facilities.

Aside from these, there are rural aquatic centres too which have a catchment population of under 15,000. However, these are not analysed for the purposes of this report considering the high magnitude of visitation to existing and now closed aquatic facilities in Christchurch.

Larger facilities with a greater catchment population are able to support a greater range of amenities, components and programming options.

These aquatic facility types are part of a continuum; consequently, there may not necessarily be a clear-cut distinction between, for example, a large community aquatic centre and a smaller district aquatic centre (or a large sub-regional aquatic centre and a smaller regional aquatic centre). Similarly, larger metropolitan facilities may also contain features typically found in tourist-oriented facilities.

It is also worth noting perhaps that tourism-oriented facilities can be a single 'blockbuster' entity, such as a 'Wet & Wild' park, or indeed an array of aquatic and seaside themed attractions distributed through such facilities.

The table below outlines the distinguishing characteristics of each of these facility types, followed by a brief description of the different categories.

**TABLE 2.** AQUATIC FACILITY HIERARCHY

| | **Local community aquatic centre** | **District/ sub-regional aquatic centre** | **Regional / metropolitan aquatic centre** | **Tourism-oriented aquatic facilities** |
|---|---|---|---|---|
| Catchment (population)* | 20,000-50,000 | 50,000-100,000 | 300,000-500,000 | 500,000 and above |
| Catchment (area) | Multi-suburb (5km) | District to metropolitan wide (20km) | Metropolitan and statewide | State to national |
| Example facilities | • 25m indoor or outdoor heated pool of 6-8 lanes<br>Some larger facilities will ALSO have:<br>• Small fitness gym<br>• Warm water program pool<br>• Small water play area<br>• 1 – 2 consulting suites<br>• Meeting rooms<br>• Café and social area | • 25m and/or 50m indoor pool of 8-10 lanes<br>• 25m or 50m outdoor lap pool<br>• Warm water program pool 25m<br>• Spa pools<br>• Sauna<br>• Outdoor lawn, shade and picnic areas<br>• Indoor and outdoor water play areas<br>• Fitness gym 500sqm+<br>• 2-3 meeting, club, activity rooms<br>• Café<br>• Retail area(s), professional suites, partner facilities | • Same as District/sub-regional level PLUS:<br>• Two 50m competition level pools<br>• Diving facilities<br>• Club/association rooms/offices<br>• Specialist coaching<br>• Fine dining, café, social areas<br>• Unique elements i.e. wave pool/standing wave | • Elite sports- national and international standards<br>• Distinct leisure focus on relaxation or rides<br>• State and National tourist markets |
| Site requirements | Built footprint<br>5,000-7,000 sqm<br>Site area<br>1-2 Ha | Built footprint<br>7,000-12,000 sqm<br>Site area<br>1.5-3 Ha | Built footprint<br>12,000-15,000 sqm<br>Site area<br>2-5 Ha | Larger stand-alone facilities may require a built footprint of between 25,000 and 30,000 sqm |

***catchment population suggested here are in the context of New Zealand facilities. In Australia, the catchment population of facilities and visitation tend to be smaller. Rural aquatic facilities with a catchment population of under 15,000 are not shown here. It is also worth noting that tourism-oriented facilities can be a single 'blockbuster' entity, such as a 'Wet & Wild' park, or indeed an array of aquatic and seaside themed attractions distributed through such facilities.**

***Local community aquatic centre***

This type of aquatic facility can just be based on a single 25 metre lap pool for smaller regional communities or a small collection of metropolitan suburbs. These facilities typically service the immediate surrounding locality and cater to local swimming needs.

*(The larger end of the community pool spectrum, which service larger regional towns and centres within metropolitan regions, may include a number of pools as well as limited ancillary facilities.)*

Examples of such facilities in New Zealand include those in Fielding, Kaiapoi, Tokoroa and Dannevirke.

***District / sub-regional aquatic centre***
District or sub-regional aquatic centres are typically the flagship offering of municipalities. They offer a range of aquatic and non-aquatic facilities, such as specialised recreational water facilities including spas, saunas, steam rooms, water playgrounds, as well as gyms and retail facilities.

They draw from a larger catchment than a local community level facility.

Additionally, the greater range of facilities on offer also draws a more diverse range of user groups, such as specialised sporting groups. Major facilities are also typically of a higher standard.

Examples of district / sub-regional facilities in Christchurch would include Jellie Park, Centennial, Pioneer and Graham Condon.

***Regional / metropolitan venues for aquatic sports and leisure***
These centres cater to a larger catchment and greater variety of users than district or sub-regional aquatic centres. They cater to large metropolitan populations and events as well as larger, hallmark events such as national swimming and diving competitions.

The purpose of community through to metropolitan aquatic centres is to function as exercise and recreation facilities that cater to local through to regional needs.

The now closed QE II in Christchurch (and the proposed Metro Sports Centre) and Mt Albert in Auckland are examples of regional / metropolitan aquatic centres.

***Tourism-oriented aquatic facilities***
Tourist-oriented facilities serve a different and much broader catchment than other types of aquatic facilities examined above.

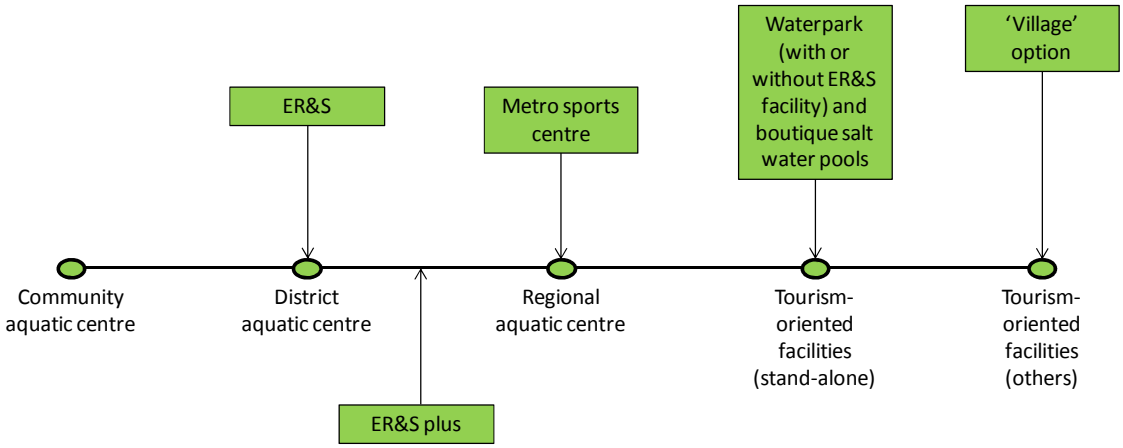
In contrast to community and metropolitan aquatic centres, tourist-oriented facilities are marketed to serve leisure and recreation needs that are more explicitly related to relaxation and/or thrill-seeking. They can attract tourists nationally and even internationally.

Clear examples of such facilities are the ‘Sea World’, ‘Wet and Wild’ and ‘Dream World’ on the Gold Coast in Australia.

In Australia, tourist-oriented aquatic facilities are generally focussed on thrill-seeking and are characterised by waterparks for juvenile audiences. In New Zealand by contrast, the focus is more on relaxation typified by facilities with hot pools / spas catering to an adult market. Of course both types of facilities exist in New Zealand and Australia and there are tourist facilities that cater to both relaxation and thrill-seeking market elements.

## 3.2 Locating the New Brighton options on the continuum

SGS’s interpretation of the Waterpark and other options for aquatic facilities in New Brighton is illustrated in the following diagram.




The 'Village in a Waterpark" concept is driven by the quality of the urban experience in New Brighton rather than aquatic facilities per se. thus it lies largely outside this continuum. Nevertheless, it has greatest alignment with the 'tourism oriented' end of the spectrum.

## 3.3 Performance and impacts

Aquatic centres promote visitation to the host area and consequently provide direct economic benefits to the local communities due to the secondary or associated spend of these visitors in the host area. A review of the literature has been completed, canvassing the economic spillover effects of aquatic facilities on local activity centres.

The extent of economic spillover benefits of an aquatic centre depends on not just the number of visitors, but importantly, the variety of tourist attractions on offer on- and off-site, i.e. cafes, restaurants, shops and the like. The catchment of the centre in turn is determined by the size and available facilities on offer at the centre.

This section profiles the catchment of different types of aquatic facilities in the hierarchy examined in this report. It subsequently discusses their economic spillover effects.

The performance and spillover of aquatic centres is examined using examples from New Zealand, Australia as well as other international case studies.

### Performance

Before examining evidence on performance from these case studies, two caveats are in order:

–It is important to note that there are many factors that influence the patronage of a facility. These include the demographic composition of the catchment, size of the community (smaller areas have higher swims per head), competitor facilities and activities, promotion, entry charges, overall quality of provision, accessibility, features provided and even staff attitudes. [6]

–It is also important to point out that there is some variation with the benchmarks used by various studies from different jurisdictions. The benchmarks used in the Australian studies are based on a catchment of five kilometres, while some New Zealand case studies use a catchment radius of 15 kilometres and others use district population to be the catchment. This, perhaps, explains the difference in benchmarks between Australian and New Zealand case studies examined below.

[6] Regional Aquatic and Recreation Centre Facility: Business Plan Review, Prepared for the City of Cockburn (WA), Davis Langdon, April 2013

***Examples from New Zealand***

The data for key centres in Christchurch (some of which have been closed since the 2011 earthquakes) compared with other examined facilities from New Zealand is indicated in Table 3.

These data indicate a strong variation in the catchment multiple of different types of facilities. The catchment multiple measures the total visits per year compared to the local catchment population of the facility. The Centennial Leisure Centre for instance, catered to a local catchment (multiple of 2.1), compared to the Queen Elizabeth II Park, which catered to a much wider market and clearly attracted visitors from the greater region and beyond (multiple of 24.1).

The diversity in catchment multiple of different facilities is also on display from other examples.

An aquatic facilities study undertaken for Hastings District Council indicates that the average pool usage per head of resident population in New Zealand is around six to eight per annum for modern indoor aquatic facilities.[7] Although the current usage in the Hastings District is somewhat lower, at an average swims per resident of 2.83 reflecting the lack of indoor pool capacity.

Similarly, a feasibility study for a proposed aquatic centre at Paraparaumu in the Kapiti Coast region indicates that the proposed facility[8] would attract at least 6 swims per head[9].

Notwithstanding the range of benchmarks mentioned, the Kapiti feasibility study suggests that, based on a large body of evidence from around the world and in NZ, patrons will not travel to facilities on a regular basis if that entails a trip of more than 15 minutes.[10]

***Examples from Australia***

The usage per capita in Australia resembles those indicated for New Zealand.

Research on visits per capita at facilities throughout regional Victoria found the range to be 6.8 and 10.3 visits per capita.[11] Research also estimated that a new indoor aquatic facility in Torquay would achieve an average of 9 visits per capita per annum.[12]

In contrast, the average per capita usage for centres in WA was 5 visits per annum. Although, there is strong variation with the average visits per head of population within WA, ranging from between 4.36 in Metropolitan Perth to 9.84 in regional areas.[13]

The most comprehensive data on performance standards for Australia is available from the University of South Australia Centre for Tourism and Leisure Management, which publishes annual performance indicator benchmarks of various Australian Public Sport, Leisure & Aquatic Centres, referred to as the CERM Performance Indicators Project. Data is collected from Council owned Aquatic and Leisure Centres across Australia. The CERM publication provides working indicators on participation, revenue, expenditure and labour costs.

CERM has a number of Performance Indicator (PI) groupings, from one to seven. Groups five to seven are related to various types and sizes of aquatic centres, as follows:

–Group 5

[7] Aquatic Facilities Strategy: Consultation Draft, Hastings District Council, November 2010

[8] First stage to include 25m lap pool, learners pool, toddlers pool, café, spa pool and sauna, hydroslide. Stage 2 to include Olympic pool, second hydroslide, 500 seats

[9] Kapiti Coast Aquatic Centre – Updated Feasibility, LHT Design, February 2010

[10] Kapiti Coast Aquatic Centre – Updated Feasibility, LHT Design, February 2010

[11] Surf Coast Shire: Indoor Aquatic Centre Feasibility Study, Sport and Leisure Solutions, November 2009

[12] Facilities proposed include indoor 25 metre pool with 8 lanes, leisure / beginner pool, 500 sqm gym, 200 sqm fitness room, health consulting suite, café, crèche

[13] Regional Aquatic and Recreation Centre Facility: Business Plan Review, Prepared for the City of Cockburn (WA), Davis Langdon, April 2013

  - Outdoor wet centre (i.e. outdoor pool/s only)
  - Dry centre with outdoor pool/s
- Group 6
  - Indoor wet centre with outdoor pool/s
  - Indoor wet & dry centre with outdoor pools
- Group 7
  - Indoor wet centre (i.e. indoor pool/s only)
  - Indoor wet and dry centre (i.e. indoor pool/s, plus hall/gym)

The 2011/2012 benchmarks include data from 344 centres across Australia. The visitation data is presented in terms of 'visits per square metre'. The catchment is based on an estimation of the population living within a five kilometre radius of the centre.

Table 4 indicates the key headline data for each of the different aquatic centre types. In terms of visitation, the larger centres with more facility offerings attracted the highest visitation numbers overall. Similarly, per square metre visitation was higher for the larger facilities. The Group 7 benchmark (89) was higher than Group 6 (72), which was in turn considerably higher than the Group 5 benchmark (32).[14]

The catchment multiple indicates that the larger facilities draw from a wider catchment.

[14] 2012 CERM PI: Operational Management Benchmarks for Australian Public Sport, Leisure & Aquatic Centres, Centre for Tourism and Leisure Management, UniSA, Vol. 21 No. 1, 2012

**TABLE 3.** PERFORMANCE OF AQUATIC CENTRES IN NEW ZEALAND

| Facility | Typology | Description | Catchment | Annual visits | Catchment multiple | Admission |
|---|---|---|---|---|---|---|
| Waipukurau & Waipawa | Community aquatic centre | indoor 25m + LTP | 5,800 | 60,000 | 10.3 | n.a. |
| Dannevirke | Community aquatic centre | indoor 25m + LTP | 5,400 | 4,800 | 8.9 | Christchurch: Based on CERM: $3.70 |
| Timaru | District/ sub-regional aquatic centre | indoor 25m + LTP + hydroslide + gym | 26,800 | 96,000 | 5 | $5.00 |
| **Christchurch** | | | Within 15km | | | various |
| Ashburton | Community aquatic centre | indoor 25m + LTP | 15,600 | 84,500 | 5.4 | $5.00 |
| AC Baths, Taupo | Tourist-oriented aquatic centre | 25m outdoor + 25m indoor + large indoor/outdoor leisure pool + LTP + 9 private mineral pools + sauna + steam + 2 hydroslides | 22,557 | 240,000 | 10.7 | $6.50 |
| Centennial Leisure Centre, Alexandra | District/ sub-regional aquatic centre | 25m 6 lane + learners and toddlers pool + spas + hydrotherapy + outdoor 25 pool | 4,400 | 72,000 | 10.6 | $4.50 |
| [illegible] | District/ sub-regional | [illegible] | 160,393 | 340,402 | 2.1 | [illegible] |
| GORE | Community aquatic centre | indoor 25m + LTP + spa + attached indoor ice rink | 10,000 | 66,000 | 6.7 | $4.50 |
| Graham Condon (2011) | District/ sub-regional aquatic centre | 25m indoor pool + gym + spa + sport hall + toddlers pool + learn to swim classes + fitness centre + aqua classes + learners' pool + indoor sports hall + free public wi-fi access + sports hall with basketball, netball and volleyball courts. | 134,949 | 522,330 | 3.9 | $2.43 |
| Invercargill Splash Palace | Tourist-oriented aquatic centre | indoor 50m pool + LTP pool + large leisure pool + spa pool + hydroslide | 50,000 | 311,000 | 6.2 | $5.20 |
| Te Awamutu | District/ sub-regional aquatic centre | indoor 25m pool + LTP + hydrotherapy + spa pool + hydroslide + attached sports hall/gym | 12,000 | 85,000 | 7.1 | $4.00 |
| [illegible] | [illegible] aquatic centre | outdoor family picnic area + free public wi-fi access + recreation programmes | [illegible] | [illegible] | [illegible] | [illegible] |
| Rotorua | District/ sub-regional aquatic centre | 50m outdoor pool + LTP pool + 25m indoor swimming pool + 4 spa pools + Lazy River + Splash pad + Gym and fitness classes + aquatic programmes + learn to swim and swim squads. | 54,594 | 330,000 | | $2.33 |
| New Plymouth Aquatic Centre | District/ sub-regional aquatic centre | 25m indoor pool + gym + spa pool + sauna and steam room + café +l earners pool + dive pool programmes and fitness classes + aquatic programmes. | 45,000 | | | $4.50 |
| Waterworld, Hamilton | District/ sub-regional aquatic centre | 25 m pool + 15 m learners pool + toddlers splash pool + gym/clubroom facilities | Catchment) n.a. | 62,329 | | $6.00 |
| **Other New Zealand** | | | | | | |
| Mt Albert Aquatic Centre, Auckland | District/ sub-regional aquatic centre | Heated Indoor 25m Competition Pool + Wave Pool + Lazy River + Spa + Sauna + Steam Room | n.a. | n.a. | n.a. | $8.10 |
| Kaiapoi | Community aquatic centre | indoor 25m + LTP pool + hydrotherapy | 14,000 | 116,000 | 8.3 | $5.10 |
| Tokoroa | Community aquatic centre | indoor 25m + LTP + spas | 14,400 | 105,000 | 7.3 | n.a. |

Source: LHT Design, 2010; Various websites, 2013; Christchurch City Council
Note: *entry prices at Christchurch facilities are averaged across all fees (i.e. standard price of entry for an adult is $5 per head). LTP = Learners and Toddlers Pool

**TABLE 4.** PERFORMANCE AND ECONOMIC SPILLOVER EFFECTS OF AQUATIC CENTRES IN AUSTRALIA: CERM BENCHMARK INDICATOR DATA

| | Group 5 | | | | Group 6 | | | | Group 7 | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Outdoor pools | | | | Indoor & outdoor pools | | | | Indoor pools | | | |
| | < 1,500 m | 1,500-2,499 m | 2,500 m | Average | < 3,000 m | 3,000-5,999 m | 6,000 m | Average | < 3,000 m | 3,000-5,999 m | 6,000 m | Average |
| Total visits per year | 24,783 | 60,964 | 142,550 | 60,964 | 109,446 | 312,160 | 577,401 | 312,160 | 186,866 | 441,522 | 628,188 | 401,839 |
| Catchment population (within 5km radius) | 10,054 | 57,097 | 40,000 | 25,600 | 18,450 | 45,000 | 105,000 | 46,888 | 31,500 | 67,100 | 61,380 | 60,000 |
| Catchment multiple | 1.8 | 0.7 | 4.3 | 2.1 | 4.6 | 6.8 | 6.9 | 5.7 | 3.9 | 8.2 | 11.5 | 7.2 |
| Fees per visit | $4.38 | $2.59 | $5.05 | $4.24 | $5.59 | $5.50 | $6.50 | $5.80 | $6.79 | $5.55 | $4.70 | $5.56 |
| Secondary spend per visit | $1.02 | $0.63 | $0.71 | $0.83 | $0.64 | $0.62 | $0.29 | $0.59 | $0.37 | $0.44 | $0.35 | $0.40 |

Source: CERM, 2012.

## Economic benefits

For the most part, the literature documents the economic spillover effects of larger metropolitan / regional aquatic centres.

***Examples from Australia***

Data on secondary spend within the facility and on the host neighbourhood is compiled using a variety of sources, including, the CERM Performance Benchmark data, as well as proxy spending data accessed from Tourism Research Australia (TRA).

The need to use TRA data arises because the CERM database provides information on secondary spend only within the facility and not off-site, and that too, only for mid-range and large aquatic centres. There is little evidence of the economic spillover effects of different types of facilities on the host neighbourhood, or indeed the secondary spend of those visiting the relatively small and large tourist-oriented facilities.

The TRA data in turn provides data on spending activity of those undertaking several different types of activities, some of them are good proxy indicators for the type of aquatic facilities examined in this report.

Using CERM Performance Benchmark data, and referring to the three groupings of facilities mentioned above (i.e. Group 5 through to Group 7), it can be shown that receipts per metre increase with the size of the facility and increased facility offerings. However, the fee per visit is not highest for the largest facility, but instead, for Group 6 types of facilities examined by CERM (refer Table 4 above).

Interestingly, the secondary spend per visit (the amount spent in-facility on food or equipment for example) was lower for the larger facilities. This may suggest that visitors have budget constraints when visiting aquatic centres and that due to the higher fees of the larger centres, are left with little residual money to spend elsewhere. Indeed, the fees per visit was found to be higher for the larger facilities, but receipts per visit was found to be quite uniform across the different types of facilities.

As pointed out above though, there is limited information on economic spillover effects or secondary spend for relatively small facilities or tourist-oriented facilities. Importantly, this lack of available expenditure information can be partially overcome by identifying comparable and substitutable experiences as proxy data. In this case, data from similar experiences has been obtained from the TRA database.

This database provides information on expenditure, by activity, region, year and trip purpose, and was made available by the TRA on request by SGS for the Sydney region and the rest of NSW for the year ending March 2013.[15] The expenditure items identified are those that will have the most relevance to secondary spending in New Brighton centre, i.e. 'Takeaway and restaurant meals' and 'Shopping, gifts and souvenirs.' A range of proxy activities have been used for the different types of aquatic facilities examined in this report. These are displayed in Table 5.

[15] The Sydney and NSW regions were identified as good proxy location as they are seaside locations and receive a high number of tourists, including international tourists. In this sense they are comparable to New Brighton.

**TABLE 5.** AQUATIC FACILITY PROXIES USED TO APPROXIMATE SECONDARY SPEND

| Examined facility type | Activity of visitors used as a proxy for examined facility type |
|---|---|
| **Local community pool** | Exercise gym or swimming at a local pool river or creek |
| **District/ sub-regional aquatic centre** | Exercise gym or swimming at a local pool river or creek |
| **Regional / metropolitan aquatic centre** | Go to the beach (including swimming) |
| **Tourism-oriented aquatic facilities (single entity)** | Visit a health spa AND Visit amusement or theme parks |
| **Tourism-oriented aquatic facilities (distributed facilities)** | Go to the beach (including swimming) |

Source: SGS, 2013.

The proxy activity chosen for the community pool and district aquatic centre ('Exercise gym or swimming at a local pool river or creek') appeared to have a suitable fit with the types of activities at a community pool and district aquatic centres.

Choosing a proxy for the metropolitan facility was difficult, because its usage is related to all types of experiences from casual recreational use through to major events. The 'go to the beach' proxy was chosen as it was the type of casual activity that is higher order than going to a gym or local pool and the expenditure was higher reflecting the higher receipts at larger aquatic centres.

Lastly, three different proxies were chosen for different types of tourist-oriented facilities. Both of the proxies chosen for a single entity tourism oriented facility reflect the two distinct types of aquatic centre tourism, i.e. the thrill-seeking market (which might be more relevant for the 'Waterpark' concept being promulgated) and rest and relaxation market. In turn, the 'go to the beach' proxy was chosen to represent spending at tourism oriented centres with facilities distributed through it, as their usage is related to all types of experiences from casual recreational use through to major events.

Table 6 displays the proxy daily spend data on food and shopping for each type of facility.

The expenditure data has been converted to New Zealand dollars.

**TABLE 6.** PROXY ECONOMIC SPILLOVER EXPENDITURE IN SYDNEY AND NSW

| | | **Total spending per day per visit (converted in NZ Dollars)** | |
|---|---|---|---|
| **Examined facility type** | **Chosen proxy activity** | **Sydney** | **Other NSW** |
| Community pool and District/ sub-regional aquatic centre | Exercise gym or swimming at a local pool river or creek | $49 | $48 |
| Regional / metropolitan aquatic centre and tourism-oriented centre (distributed facilities) | Go to the beach (including swimming) | $71 | $57 |
| Tourism-oriented aquatic facilities (single entity) | Visit amusements or theme parks | $96 | $79 |
| Tourism-oriented aquatic facilities (single entity) | Visit a health spa (2003 onwards) | n.a. | $114 |

Source: Tourism Research Australia, 2013
Note: Converted into $NZ. Australian average health spa spend data has been applied for Sydney due to data unavailability.

For stand-alone tourist facilities, it is difficult to determine exactly how much of this secondary spend would be captured off-site, given that many of these facilities can be located on large sites away from activity centres and are typically self-contained in terms of retail offering.
It is also worth pointing out that spending patterns in the host neighbourhood of suggested facilities will emulate those reflected in the proxy measures shown here, only when the host neighbourhood indeed provides appropriate spending opportunities for patrons visiting such facilities.

***Examples from New Zealand***
When compared with Australian leisure facilities, those in New Zealand charge a much lower fee per visit.

The comparatively lower entry fee does not, however, lead to comparatively higher secondary spending by visitors (within facility) in New Zealand. The secondary spend per visitor is, interestingly, relatively low compared to the Australian CERM benchmarks. Whilst Australian visitors spent between 7% and 20% of total entry fee on secondary purchases, New Zealand visitors spent merely 0.3% (and only in one instance 17%) of total entry fee on secondary spending at corresponding facilities.

Collectively the economic spillover expenditure from Australia and New Zealand seem to suggest these findings:

–The available possibilities of spending at facilities on-site or off-site dictate spending behaviour by patrons. Those facilities where opportunities to spend on other items are limited do not have high secondary spend associated with them.

–Visitors act within a budget constraint; if the entry fee is increased, then they will spend relatively less on other purchases constituting the secondary spend.

–Whilst remaining within a budget constraint, visitors are also perhaps mindful of the relative expenditures on primary and secondary spending activities at the destination. Spending on secondary purchases is kept at a minimum in relation to the cost of the primary activity, which is swimming/recreation.

**TABLE 7.** CERM BENCHMARK DATA: CHRISTCHURCH FACILITIES

| | Queen Elizabeth II Park (2010) *(now closed)* | Centennial Leisure Centre (2010) *(now closed)* | Graham Condon (2011) | Jellie Park (2011) | Pioneer Recreation and Sports Centre (2011) |
|---|---|---|---|---|---|
| Visits per square metre | 218 | 163 | 132 | 175 | 179 |
| Total visits per year | 1,806,948 | 340,403 | 522,330 | 907,678 | 1,120,770 |
| Catchment population (within 5km radius) | 74,886 | 160,393 | 134,949 | 136,048 | 99,914 |
| Catchment multiple | 24 | 2 | 4 | 7 | 11 |
| Fees per visit | $1.9 | n.a. | $2.4 | $3.6 | $2.7 |
| Secondary spend per visit | $0.33 | $0.15 | | $0.01 | $0.01 |
| Receipts per metre | $487 | $583 | | | |

Source: CERM, 2012.

***Examples from non-Australasian jurisdictions***

The following three international aquatic centre case studies have been examined for economic spillover effects:

–National Aquatic Centre, Dublin

–Weyerhaeuser King County Aquatic Centre, USA

–Family Water Park & Aquatic Centre (Splash), Georgia, USA

These studies provide perhaps the best estimate of economic spillover on the host neighbourhood.

*National Aquatic Centre, Dublin*

The National Aquatic Centre in Dublin includes an international standard 50 metre swimming pool (the only publicly available 50m pool in Ireland) and diving pool, a fitness centre, café and seating for up to 2,500 spectators. The centre has hosted a range of local, national and international events.

A recent study by URS calculated the per capita economic spillover (spending off-site) for day trip visitors to the facility[16]. The expenditure does not include spending from people in the immediate locality, as this is not considered net additional spend. The results indicate that those using the aquatic centre spent between 25 and 30 Euros in the host locality (with the exception of members, whose spend was low by comparison):

–Participants and spectators of local and regional events – 25 euros ($NZ 39)

–Aquazone visitors – 29 euros ($NZ 45)

–Public usage – 25 euros ($NZ 39[17])

In terms of multipliers, the URS study indicated that, given the above evidence and the location of suppliers, multipliers are 1.2 at a local level, 1.6 regionally and 1.8 nationally. In other words, spending at the centre supports further spending and supplies in the local area by a factor of 1.2.

*Weyerhaeuser King County Aquatic Centre, USA*[18]

The Weyerhaeuser King County Aquatic Centre (WKCAC) is a 2,500 seat facility with an international standard 50 metre swimming pool, diving pool and recreation pool. Evidence was collected on the amount of expenditure arising from events. The research found that the average secondary spend per visitor for an event (back in 2002) was as shown in the table overleaf.

Indexed to 2013 dollars, the spend equates to around $NZ 17 for local visitors, $NZ 40 for intrastate visitors and $NZ 65 for interstate visitors.

[16] Economic Impact of the National Aquatic Centre & Morton Stadium, URS, May 2012

[17] NZ equivalent expenditure has been derived by comparing average incomes.

[18] An Economic Impact Study of the Weyerhaeuser King County Aquatic Centre, University of Washington, June 2002

**TABLE 8.** AVERAGE SPEND PER VISITOR DURING EVENT HOSTED AT WEYERHAEUSER KING COUNTY AQUATIC CENTRE (WKCAC)

| Items purchased | Local visitors | Intrastate visitors | Interstate visitors |
|---|---|---|---|
| Food and beverages before or after visit | $9.5 | $21.8 | $37.0 |
| Recreation or entertainment before or after visit | $1.2 | $4.4 | $4.0 |
| Other souvenirs and gifts | $1.3 | $2.1 | $4.8 |
| Total | $11.9 | $28.3 | $45.8 |

Source: University of Washington, 2002.
Note: NZ equivalent expenditure has been derived by comparing average incomes.

*Splash in the Boro Water Park & Aquatic Centre (Splash), USA*[19]

Splash in the Boro is an aquatic centre located in Georgia, USA. The park has a number of water features including a 25 metre lane pool, hydrotherapy pool, leisure pools and a Lazy River pool. The average visitor spending per day was calculated to be $US 50 ($NZ 62); although this includes travel and other costs so the actual secondary spend is likely to be lower.

An average multiplier of 1.4 was estimated to apply to the local economy from an initial spending generated at the facility.

## 3.4 Implications for potential aquatic centre at New Brighton

In terms of visitation, the larger centres with more facility offerings attract the highest visitation numbers overall. Similarly, per square metre visitation was higher for the larger facilities.

In terms of economic spillover spending, the literature demonstrates the following:

- **Local community aquatic centre and district/ sub-regional aquatic centre**: Research suggests that day visitors indulging in similar activities as those provided by local aquatic centres could spend up to approximately $NZ 50 per day on food and shopping off-site (refer Table 6 above).
- **Regional/metropolitan aquatic centre:** According to research, day visitors indulging in similar activities as those provided by metropolitan aquatic centres could spend between $NZ 57 and $NZ 71 per day on food and shopping (refer Table 6 above).

  Visitors at similar aquatic centres at international locations have been known to spend between $NZ 12 (local users) and $NZ 45 (interstate users) (refer Table 8 above).

  The amount of spend captured by a nearby centre would depend on the extent of the retail offering at the aquatic facility compared to the nearby activity centre, the overall amount and type of food and retail available at the activity centre, as well as proximity and ease of accessibility to that centre.
- **Tourism-oriented aquatic facilities:** Should proxy data be relied upon, day visitors are likely to spend between $NZ 57 and $NZ 114 per day on food and shopping when visiting these type of aquatic facilities (refer Table 6 above).

  For stand-alone tourist facilities, it is difficult to determine exactly how much of this secondary spend would be captured off-site, given that many of these facilities can be located on large sites away from activity centres and are typically self-contained in terms of retail offering.

[19] Splash in the Boro Family Water Park & Aquatic Centre, An Economic Impact Study, Bureau of Business Research and Economic Development, 2009

Where such tourist oriented facilities are distributed in a 'village', the opportunity for secondary spend to be captured in the centre hosting the 'village' is rather high.

Therefore, it is clear from the literature that the economic spillover effects from larger facilities and tourist-oriented facilities is higher than the lower order aquatic centres. These effects are likely to be replicated in New Brighton, depending on the type of facility that is chosen for the area.

# REGIONAL STRATEGY FOR AQUATIC FACILITIES

Independent insight.

# 4 REGIONAL STRATEGY FOR AQUATIC FACILITIES

**Overview**

This section summarises Christchurch City Council's overarching strategy for the distribution of new and refurbished aquatic facilities across the metropolitan region. It also addresses the Council's broader tourism development plan and the part which aquatic facilities might play in this.

## 4.1 Proposed Council investment in aquatic facilities

Several major aquatic facilities were damaged by the earthquakes and were consequently closed; the larger ones of these included the Queen Elizabeth II Park and the Centennial Leisure Centre. Some smaller facilities which have also closed include Waltham and Lyttelton outdoor summer pools. The distribution of current major facilities is shown in Table 3 above. It is evident that only district/sub-regional centres are presently available in Christchurch.

### Plans for re-investment

Christchurch City Council remains highly supportive of sports events in the City and region through direct sponsorship and support of sports events as well as through the provision, management and maintenance of many event facilities.

Indeed, Christchurch City Council's Community Outcomes 2006 to 2012 Strategy enlists nine outcomes of importance for the well-being of the city, and which form the people's vision for the city. These include:

–A safe city

–A city of people who value and protect the natural environment

–A well governed city

–A prosperous city

–A healthy city

–*A city for recreation, fun and creativity*

–A city for lifelong learning

–An attractive and well-designed city

Of relevance among these for the provision of new aquatic facilities in the city is the one italicised in the list above, i.e. *'a city for recreation, fun and creativity'.*

Council's level of support in this area is also documented in the Three Year Plan (2013-16). Specifically it states that the Council has agreed to rebuild or repair several sporting facilities. It plans to build new facilities including the Central City Metropolitan Sports Facility and the Eastern Aquatic Facility (ER&S).

**TABLE 9.** PLANS FOR RE-INVESTMENT IN AQUATIC FACILITIES

| Proposed facility | Facility type | Proposed facilities | Justification | Constraints |
|---|---|---|---|---|
| Central City Metropolitan Sports facility | Metropolitan aquatic centre | –Netball, basketball, volleyball and capability for badminton, table tennis and gymnastics<br>–A separate indoor aquatic centre with 50m 10 lane pool for swimming, water polo, canoe polo and other aquatic sports<br>–Leisure attractions such as water slides, aqua play and leisure pools | –No such facility presently exists<br>–Will be able to accommodate multiple sports events and user purposes (from recreational to elite)<br>–Will promote tourism visitation to Christchurch | None identified |
| Eastern Aquatic Facility | Sub-regional aquatic centre | Will include aquatics and indoor activities | Will provide for loss of provision in the eastern area that was previously QE II and also for the expected growth in the north east of of the City | None identified |

The Metro Sports Centre has been identified in the Central City Plan as a key anchor project to support revitalisation of the Central City. It will be important than any aquatic leisure facilities established elsewhere in the city support an integrated network and distribution that reflects customer catchments and does not result in direct competition between similar facilities. The current anticipated leisure attractions at the Metro Sports Centre incorporate a mix of leisure pools and features, including: themed spa pools; rapid river, wave or themed pool; sauna, steam and therapy rooms/pools; 'Terrifying slides' and a major aquatic themed attraction integrated into the facility design; and children's interactive aquaplay.

As pointed out by the National Facilities Strategy for Aquatic Sports (May 2013), the City of Christchurch does not presently have aquatic facilities to host national or international events. The table below lists the future potential of the city to host national aquatic sports events, assuming new facilities are built. It identifies that the possibility to attract such sports to Christchurch remains relatively high. It needs to be acknowledged though that some of these events are not held frequently. Consequently, the rationale to build these facilities should extend beyond attracting national events.

The Strategy listed the potential for any new investments in aquatic sports facilities to attract international events as being low.

**TABLE 10.** COUNCIL'S IDENTIFIED ABILITY TO ATTRACT NATIONAL EVENTS IN AQUATIC SPORTS

| Main national event | Ability to attract national event | Considerations |
|---|---|---|
| NZ Swimming National Championships | Medium | Likely to attract this event once every 4-5 years |
| NZ Diving National Championships | Medium | Likely to attract this event but low number of events per year |
| NZ Synchro National Championships | Medium | Likely to attract this event but low number of events per year |
| NZ Waterpolo National Championships – National League Finals | High | Likely to attract this event but low number of events per year |
| Paralympics NZ – Swimming PNZ Nationals | High | Likely to attract this event once every 4-5 years |

Source: National Facilities Strategy for Aquatic Sports (May 2013)

Importantly, The Strategy makes the following observations and recommendations in regard to the provision of aquatic facilities in Christchurch:

–Observations

- Presently there are 18 more standard sized pools in New Zealand than required. There are generally enough pools in New Zealand for the scale of the population but they are distributed poorly, relative to the needs of their communities.
- 19% of the total pool area in the Canterbury region is over 45 years of age, with over 2% of all pool facilities reported to be in poor condition.
- The establishment of the Christchurch Central City Metro Sports Facility will provide suitable facilities for international competitions in New Zealand. The publicly available information indicates that the Metro Sports Facility will be a world-class venue and centre of excellence, accessible to people of all ages, abilities and sporting skills. It will provide aquatic and indoor sports facilities and cater to the day-to-day needs of the recreational and leisure, educational and high-performance sporting communities, and host national and international events.
- The new Christchurch Metro Sports Hub will be critical in meeting the needs of the Upper South Island. However, this facility's contribution at a regional and national level is more important than its contribution as an international facility.
- The older (50+) age groups in the demographic profile are the major growth area and they have different expectations for aquatic facilities, being temperature, access, covered and water depth. Consequently, there is a need to adapt and refurbish existing facilities to meet the needs of an aging population which can also include the provision of more tailored programmes within existing facilities. This is to ensure higher utilisations potentially in non-peak times now and into the future.

–Recommendations

- Canterbury requires one additional standard (Local Suburban) pool facility by 2031 in addition to those proposed, i.e. Metro Sports Facility and ER&S facility.
- Ensure that the proposed Christchurch Central City Metro Sports Facility has sufficient capacity to operate as a regional and national-level facility for the mid and upper South Island.

- Ensure that the proposed Christchurch Metro Sports Hub has sufficient capacity to operate as a regional and national-level facility for the mid and upper South Island.

## 4.2 Inter-regional and international tourism development

International visitation to the Canterbury region has reduced considerably; down from over 800,000 visitors in 2004 to less than 650,000 in 2013. It is unsurprising that attracting both domestic and international visitors to the region remains a high priority.

Council's visitor strategy (2007-17) which was prepared before the earthquakes, sets the vision for Christchurch to be *"a leading destination for both domestic and international visitors in New Zealand……."* where *"visitors are drawn"* because of its *"world-class facilities"* amongst other things. Its key strategic goals supporting this vision are:

- Developing Christchurch into a priority destination for all visitors, by providing unforgettable experiences through ongoing product development across a range of attractions, activities, festivals and events.
- Building a prosperous and enduring visitor industry, by providing amongst other things, an adequate visitor infrastructure.
- Ensuring visitors continue to benefit the local communities, and that visitation increases in accord with the needs and wishes of the local communities it affects.

The strategy also acknowledges the perception of Christchurch as being *"dull, boring and conservative"*. It suggests that domestic visitors viewed Christchurch as a *"shopping centre, international connection point and a destination for visiting friends and family".* This perception may partially offset the 'wet n wild' image of the Waterpark.

The New Brighton Draft Master Plan identifies the vision for New Brighton to be a *"fun, creative and lively"* destination *"…….whilst also being functional in meeting the needs of the local community and attracting visitors and tourist to a 'unique destination'"*. This draft plan captures the views of the community who perceive aquatic areas as ideal venues for young people to become actively involved in the community.

Importantly, research has shown that aquatic facilities promote community well-being and mental health of individuals, which is known to have a direct impact on reducing crime and vandalism in the community.[20]

The visitor strategy acknowledges that tourists to Christchurch engage primarily in sightseeing activities, walking, shopping and spending time at beaches, museums and travelling to Mount Cook. Such activities were high on the agenda of domestic and international tourists to Canterbury before the quake (refer Table 11 below). Interestingly, some water related activities such as kayaking, sailing, fishing, diving and surfing are popular activities at Banks Peninsula.

Indeed research from the Ministry of Business, Innovation and Employment also shows that of all domestic visitor trips in New Zealand made in 2013, 1% of all visitors participated in Canoeing, Kayaking and Rafting; 4% participated in swimming; 1% in fishing; 2% participated in other water activities and 1% visited in Theme and Leisure Parks. It appears that a modest number of visitors seek thrill-oriented aquatic sports and activities.

[20] Sport NZ Research and SGS (2009). Impact of Sport and Recreational Facilities in Victoria. A Report for Sport & Recreation Victoria.

**TABLE 11** SELECTED ACTIVITIES OF DOMESTIC & INTERNATIONAL TOURISTS TO CANTERBURY (AUGUST 2007)

| Activities/ Attractions | August 2007 |
|---|---|
| Eating out/ restaurants | 32% |
| Shopping | 32% |
| Walk in the City | 80% |
| Beaches | 22% |
| Bar/ nightclub | 16% |
| Sightseeing tour | 30% |
| Scenic drive | 30% |
| Swimming | 11% |
| Museums and Galleries | ~23% |
| Gardens | 12% |
| Heritage Attractions | 19% |

Source: Christchurch Visitor Strategy 2007.

## 4.3 Concluding remarks

Broadly speaking, SGS's desktop review suggests that the Christchurch region will be well serviced with aquatic facilities once current re-investment plans are fully implemented.

Proposals for additional or supplementary aquatic facilities at New Brighton will need to be justified on grounds other than community service requirements. That is, they will need to demonstrate significant tourist drawing power related to the novelty of the concepts on offer within the context of the wider tourism experience in Christchurch.

# OPTIONS AND IMPACTS ON NEW BRIGHTON

Independent insight.

# 5 OPTIONS AND ECONOMIC IMPACTS ON NEW BRIGHTON

**Overview**

This section identifies and evaluates the options for investment in aquatic, or other, facilities to support the revitalisation of the New Brighton centre.

## 5.1 Options

As pointed out in introductory section, a total of nine options are being evaluated at this stage. These options are described in the table below, ranging from the more ambitious 'Village option' to the more conservative scenario where no aquatic facilities are provided in New Brighton.

**TABLE 12.** DESCRIPTIONS OF OPTIONS OF PROVISION OF AQUATIC FACILITIES

| No. | Name | Description |
|---|---|---|
| 1 | No Waterpark and ER&S facility located elsewhere in the East | No aquatic facilities are provided in New Brighton, whilst the ER&S facility is located somewhere else in the city's east.<br>The ER&S facility, in part, will replace the facilities previously available at QEII, and will include elements as described below in Option 4. |
| 2 | Waterpark combined with the ER&S facility in New Brighton | A variation to the theme identified in Option 3 below is that a Waterpark 'blockbuster' facility is provided as suggested along the lines below, but this facility also incorporates an ER&S facility. That is, apart from aquatic rides and sports, this facility provides other dry sport and recreation options.<br>Key elements of this facility are likely to constitute: 25m x 25m laned pool; learn to swim pool (25 metre x 12.5 metre); fitness gymnasium; foyer/reception; café; and change rooms. The facility will also include both a fitness centre (group exercise studio) and indoor sport (for example, several basketball courts). Additional facilities likely to be included are: static wave, river, lagoon, beach, aquaplay and outdoor spas.<br>The vision for this option is not to be an aquatic centre with just a few water toys on the side, but rather, a waterpark with elements of aquatic centre attached. |
| 3 | Waterpark only in New Brighton and ER&S facility located elsewhere | A Waterpark 'blockbuster' facility which will have 25 metre salt water pools under cover for 365 day recreational enjoyment and sport as well as wave-pools, hydro-slides and gymnasium. This envisages a major water sports and leisure facility embedded within a re-framed New Brighton shopping centre. The Waterpark, as the current proposals stand, would extend across Marine Parade and on to the foreshore. |
| 4 | ER&S facility only in New Brighton | Only a major aquatic facility such as the ER&S facility is provided in New Brighton with no Waterpark. The ER&S Facility will include: a 25 metre and a 33 metre lap |

| | | |
|---|---|---|
| | | pool; Learn to Swim pool; leisure: spa, aquaplay, hydro slide/s; fitness centre – group exercise studio; and 3 basketball courts. |
| 5 | 'Village' in a Waterpark | The 'Village in a Waterpark' envisages a number of smaller scale aquatic facilities distributed around the edge of the centre and complementing the existing sea and river attractions. It includes boardwalks / coastal promenade; outdoor pools, specifically a salt water hot pool; mixed use buildings and beach front interaction; and shopping and markets.<br><br>Under this option, the proposed salt water hot pools would be located on the foreshore adjacent to the surf club and using a small portion of the current Council car park. The three pools would be 'nested' into the dunes and provide a good visual outlook and new experience for residents and visitors.<br><br>In this option, the whole of New Brighton is expected to be transformed into a 'village', and this village would have distributed through it a range of aquatic and seaside themed attractions. In addition to the existing sea/surf and river opportunities, the 'Village' option might involve a foreshore, transitional saltwater pool development; an attraction by the river – potentially a small whitewater course or river rides; and other non-aquatic options, such as a coastal promenade, mixed use buildings and markets.<br><br>New Brighton would be cultivated as a seaside tourist attraction along the lines of St Kilda, Fremantle, Glenelg or, indeed, Brighton in the UK. In this scenario, it might have a 'Luna Park', boardwalk, eat street, sideshow alley, specialised retailing, a water play facility, a swim centre, a surfing museum etc.<br><br>*(This idea is conceptualised more in the section below).* |
| 6 | Boutique salt water pool in New Brighton to complement ER&S facility elsewhere | The ER&S Facility will not be located in New Brighton and aquatic elements within New Brighton will be limited to a boutique salt water hot pool, as described above in Option 5. |
| 7 | All aquatic entertainment elements in New Brighton and a reduced scale fitness oriented ER&S facility elsewhere | This is a combination of Option 3 (Waterpark only) and Option 6 (salt water pool only) described above, with the difference being that the ER&S Facility elsewhere in the East would provide 'dry' elements only. |
| 8 | Scaled down 'Village' option | In a variation to option 5, this option involves using a portion of the Earthquake Appeal funding ($4.5 million) to pursue a smaller, targeted 'Village' option. The intent would be to support a small range of additional attractions around the commercial core of New Brighton to reinforce a seaside village theme. This would be developed over time and would incentivise time and investment from the local community so that responsibility for success is shared. The new attractions would complement previous investments in New Brighton (library, pier), provide the opportunity and incentive for visitors to wander through the shopping area and encourage business and land owners to continue to invest in the centre.<br><br>This option would include a small, transitional hot water pool complex, potentially associated with a surf club redevelopment, on the foreshore of New Brighton, funded partly by the Earthquake Appeal funding.<br><br>This would enable the ER&S Facility to be located at its optimal location somewhere in the East of the City, without being so large as to compete with the Metro Sport Centre. |
| 9 | ER&S facility 'plus' | This entails a full-sized ER&S Facility, with significant leisure features, day spa and salt water pools on a coastal location. |

## Attributes for a Successful Waterfront Village

So as to understand the attributes which contribute to the success of a 'waterfront village' atmosphere SGS has surveyed three well known Australian examples profiled below:

–**Glenelg,** a popular beach-side suburb in Adelaide, South Australia has become a popular tourist destination due to its beach, large number of high rise hotels and fine dining restaurants.

–**St Kilda,** an inner southern suburb of Melbourne, located along the beach of Port Phillip, has developed into a trendy cosmopolitan destination due to its music, café and bar scene. St Kilda is also known for its 'sea baths' which is a complex housing an indoor saltwater pool, spa and gymnasium located just along the beach edge.

Both Glenelg and St Kilda have small densely fitted out amusement parks which are regularly visited by locals and visitors alike.

–**Fremantle,** located at the mouth of the Swan River in Perth, Western Australia boasts a vibrant live music scene with many local performers and venues.

The table below shows the attributes which make these areas popular to live and visit.

**TABLE 13** ATTRIBUTES OF WATERFRONT VILLAGES

| Activities | Glenelg | St Kilda | Fremantle |
|---|---|---|---|
| Wildlife Tours and Other Scenic Tours (i.e. swimming with dolphins) | ✓ | ✓ | ✓ |
| Restaurants and Cafes | ✓ | ✓ | ✓ |
| Iconic Landmark (i.e. Pier or Lighthouse) | ✓ | ✓ | |
| Late-night music venues such as bars and nightclubs | ✓ | ✓ | ✓ |
| Hotels | ✓ | | |
| Cycle, Rollar Blade and Skating along the Promenade | ✓ | ✓ | |
| Amusement Park | ✓ | ✓ | |
| Sail, Windsurf, Surf, Kitesurf | ✓ | ✓ | ✓ |
| Fine Dining | ✓ | ✓ | ✓ |
| Small boutique stores (i.e. records, fashion, surf) | | ✓ | |
| Tourist stores (i.e. professional photographs of the local area and history) | | | |
| Caravan Park | | | |
| Community market | ✓ | ✓ | ✓ |
| Community facilities (i.e. libraries, golf course, ovals) | ✓ | ✓ | ✓ |
| Point of Difference | Large Number of High Rise Hotels and Restaurants | Edgy Music, Cafe and Bar Scene | Known for its regular Music, Artistic and Indigenous Festivals |

## 5.2 Option evaluation

### Estimated spillover potential

is the maximum potential annual spending (aggregated for both on-site and off-site spending) that New Brighton might achieve under each of the evaluated options. The assumptions underpinning these estimations are mentioned in the table within parenthesis.

For this assessment, likely visitation statistics to aquatic facilities under different options have been sourced from the SGL study which was running in parallel with this study.

It must be stated here that these estimates are produced assuming that whichever aquatic option is finalised and built, will be financially viable. This report was not required to test the viability of the proposed aquatic option itself.

### Evaluation criteria

The potential of these development options on the revitalisation of the New Brighton commercial centre and the central city as well as their effects on the planned metropolitan sports centre are assessed against the following option evaluation criteria:

–Harmonisation with wider City of Christchurch aquatic facility investment and tourism strategies, i.e. appropriateness for central city revitalisation;

–Fit with community aspirations of aquatic facilities in the New Brighton area, and its long term role and function;

–Likely economic impact (spill-over effects on the trading performance of New Brighton); and

–Practicality of delivery, i.e. likely use of the facility given surrounding land uses in New Brighton/ elsewhere, and the suggested need for additional aquatic facilities in New Brighton.

The results are shown in Table 16 below.

**TABLE 14** PROSPECTS OF MAXIMUM OFFSITE EXPENDITURE IN NEW BRIGHTON UNDER EACH EVALUATED OPTION

| Options | Additional annual visits to New Brighton *(sourced from SGL Report)* | Maximum spend per visit on and off-site | Maximum potential spend per year in New Brighton | Maximum spend as a percentage of current total retail turnover in New Brighton catchment (i.e. $155 million) |
|---|---|---|---|---|
| Option 1: No Waterpark and ER&S facility located elsewhere in the East | No additional visitors to New Brighton | None | None | Not applicable |
| Option 2: Waterpark combined with the ER&S facility in New Brighton | Between 800,000 and 1.19 million visits from primary and secondary catchment and up to 50,000 regional and tourist visits | Visitors from primary and secondary catchment spend up to NZ$ 12 off-site (*i.e. observed per visit spend off-site by local users visiting similar aquatic centres in international locations – refer* Table 8)<br>Regional and international tourists spend between NZ$ 27 and NZ$ 57 off-site *(i.e. half of the likely off-site spend by tourists visiting tourist-oriented facilities – refer* Table 6. *The other half of total observed spending likely to be spent on-site and contained within the Waterpark rather than diffused through New Brighton centre).* | Between NZ$ 10.9 and NZ$ 17 million | Between 7% and 11% |
| Option 3: Waterpark only in New Brighton and ER&S facility located elsewhere | Between 410,000 and 550,000 visits from primary and secondary catchment and up to 50,000 regional and tourist visits | Visitors from primary and secondary catchment spend between NZ Visitors from primary and secondary catchment spend up to NZ$ 12 off-site (*i.e. observed per visit spend off-site by local users visiting similar aquatic centres in international locations - refer* Table 8)<br>Regional and international tourists spend between NZ$ 27 and NZ$ 57 off-site *(i.e. half of the likely off-site spend by tourists visiting tourist-oriented facilities – refer* Table 6. *The other half of total observed spending likely to be spent on-site and contained within the Waterpark rather than diffused through New Brighton centre).* | Between NZ$ 6.3 and NZ$ 9 million | Between 4% and 6% |
| Option 4: ER&S facility only in New Brighton (with extra water features) | Between 780,000 and 900,000 visits from primary catchment | 15% of patrons visiting the facility spend up to $48 off-site (*i.e. the likely off-site spend by patrons visiting district facilities – refer* Table 6). | Between NZ$ 5.6 and NZ$ 9 million | 4% |
| Option 5: 'Village' in a Waterpark | Between 800,000 and 1.19 million visits from primary and secondary catchment and up to 100,000 regional and tourist visits (*estimated after taking the average of all inter-regional and international tourists who visit New* | Visitors from primary and secondary catchment spend up to NZ$ 12 off-site (*i.e. observed per visit spend off-site by local users visiting similar aquatic centres in international locations - refer* Table 8)<br>Regional and international tourists spend between NZ$ 57 and NZ$ 114 off-site *(i.e. half of the likely off-site spend by tourists visiting tourist-oriented facilities – refer* Table 6. *The other half of total observed spending likely to be spent on-site and contained within the Waterpark rather than diffused through New Brighton centre).* | Between NZ$ 15 and NZ$ 25 million | Between 10% and 17% |

| Options | Additional annual visits to New Brighton *(sourced from SGL Report)* | Maximum spend per visit on and off-site | Maximum potential spend per year in New Brighton | Maximum spend as a percentage of current total retail turnover in New Brighton catchment (i.e. $155 million) |
|---|---|---|---|---|
| | *Zealand for swimming and visiting marine parks and assuming that 27% of these visitors are bound for Christchurch and half of these visit New Brighton)* | | | |
| Option 6: Boutique salt water pool in New Brighton to complement ER&S facility elsewhere | Between 180,000 and 200,000 visits from catchment | 10% of patrons visiting the facility spend up to $48 off-site (*i.e. the likely off-site spend by patrons visiting district facilities – refer* Table 6). | Up to NZ$ 1 million | 1% |
| Option 7: All aquatic entertainment elements in New Brighton and a reduced scale fitness oriented ER&S facility elsewhere | Between 590,000 and 750,000 visits from primary and secondary catchment and up to 50,000 regional and tourist visits | Visitors from primary and secondary catchment spend up to NZ$ 12 off-site (*i.e. observed per visit spend off-site by local users visiting similar aquatic centres in international locations - refer* Table 8)<br><br>Regional and international tourists spend between NZ$ 27 and NZ$ 57 off-site *(i.e. half of the likely off-site spend by tourists visiting tourist-oriented facilities – refer* Table 6. *The other half of total observed spending likely to be spent on-site and contained within the Waterpark rather than diffused through New Brighton centre).* | Between NZ$ 8 and NZ$ 12 million | Between 5% and 8% |
| Option 8: Scaled down 'Village' option | Over time, as this option matures, it should emulate the results expected under Option 3, i.e. Waterpark only with ER&S facility provided elsewhere | | | |
| Option 9: ER&S facility 'plus' | Between 970,000 and 1.1 million visits from primary catchment | 15% of patrons visiting the facility spend up to $48 off-site (*i.e. the likely off-site spend by patrons visiting district facilities – refer* Table 6). | Between NZ$ 7 and NZ$ 8 million | 5% |

**TABLE 15.** RANKING OF OPTIONS AGAINST EVALUATION CRITERIA

| Options | Additional annual visits to New Brighton* | Maximum spend per visit on and off-site | Maximum potential spend per year in New Brighton | Maximum spend as a percentage of current total retail turnover in New Brighton catchment (i.e. $155 million) |
|---|---|---|---|---|
| Option 1: No Waterpark and ER&S facility located elsewhere in the East | No additional visitors to New Brighton | None | None | Not applicable |
| Option 2: Waterpark combined with the ER&S facility in New Brighton | Between 800,000 and 1.19 million visits from primary and secondary catchment and up to 50,000 regional and tourist visits | Visitors from primary and secondary catchment spend up to NZ$ 12 off-site (*i.e. observed per visit spend off-site by local users visiting similar aquatic centres in international locations – refer* Table 8)<br><br>Regional and international tourists spend between NZ$ 27 and NZ$ 57 off-site *(i.e. half of the likely off-site spend by tourists visiting tourist-oriented facilities – refer* Table 6. *The other half of total observed spending likely to be spent on-site and contained within the Waterpark rather than diffused through New Brighton centre).* | Between NZ$ 10.9 and NZ$ 17 million | Between 7% and 11% |
| Option 3: Waterpark only in New Brighton and ER&S facility located elsewhere | Between 410,000 and 550,000 visits from primary and secondary catchment and up to 50,000 regional and tourist visits | Visitors from primary and secondary catchment spend between NZ Visitors from primary and secondary catchment spend up to NZ$ 12 off-site (*i.e. observed per visit spend off-site by local users visiting similar aquatic centres in international locations - refer* Table 8)<br><br>Regional and international tourists spend between NZ$ 27 and NZ$ 57 off-site *(i.e. half of the likely off-site spend by tourists visiting tourist-oriented facilities – refer* Table 6. *The other half of total observed spending likely to be spent on-site and contained within the Waterpark rather than diffused through New Brighton centre).* | Between NZ$ 6.3 and NZ$ 9 million | Between 4% and 6% |
| Option 4: ER&S facility only in New Brighton (with extra water features) | Between 780,000 and 900,000 visits from primary catchment | 15% of patrons visiting the facility spend up to $48 off-site (*i.e. the likely off-site spend by patrons visiting district facilities – refer* Table 6). | Between NZ$ 5.6 and NZ$ 9 million | 4% |
| Option 5: 'Village' in a Waterpark | Between 800,000 and 1.19 million visits from primary and secondary catchment and up to 100,000 regional and tourist visits (*estimated after taking the average of all inter-* | Visitors from primary and secondary catchment spend up to NZ$ 12 off-site (*i.e. observed per visit spend off-site by local users visiting similar aquatic centres in international locations - refer* Table 8)<br><br>Regional and international tourists spend between NZ$ 57 and NZ$ 114 off-site *(i.e. half of the likely off-site spend by tourists visiting tourist-oriented facilities – refer* Table 6. *The other half of total observed spending likely to be spent on-site and contained within the* | Between NZ$ 15 and NZ$ 25 million | Between 10% and 17% |

| Options | Additional annual visits to New Brighton* | Maximum spend per visit on and off-site | Maximum potential spend per year in New Brighton | Maximum spend as a percentage of current total retail turnover in New Brighton catchment (i.e. $155 million) |
|---|---|---|---|---|
| | *regional and international tourists who visit New Zealand for swimming and visiting marine parks and assuming that 27% of these visitors are bound for Christchurch and half of these visit New Brighton)* | *Waterpark rather than diffused through New Brighton centre).* | | |
| Option 6: Boutique salt water pool in New Brighton to complement ER&S facility elsewhere | Between 180,000 and 200,000 visits from catchment | 10% of patrons visiting the facility spend up to $48 off-site (*i.e. the likely off-site spend by patrons visiting district facilities – refer* Table 6). | Up to NZ$ 1 million | 1% |
| Option 7: All aquatic entertainment elements in New Brighton and a reduced scale fitness oriented ER&S facility elsewhere | Between 590,000 and 750,000 visits from primary and secondary catchment and up to 50,000 regional and tourist visits | Visitors from primary and secondary catchment spend up to NZ$ 12 off-site (*i.e. observed per visit spend off-site by local users visiting similar aquatic centres in international locations - refer* Table 8)<br><br>Regional and international tourists spend between NZ$ 27 and NZ$ 57 off-site *(i.e. half of the likely off-site spend by tourists visiting tourist-oriented facilities – refer* Table 6. *The other half of total observed spending likely to be spent on-site and contained within the Waterpark rather than diffused through New Brighton centre).* | Between NZ$ 8 and NZ$ 12 million | Between 5% and 8% |
| Option 8: Scaled down 'Village' option | Over time, as this option matures, it should emulate the results expected under Option 3, i.e. Waterpark only with ER&S facility provided elsewhere | | | |
| Option 9: ER&S facility 'plus' | Between 970,000 and 1.1 million visits from primary catchment | 15% of patrons visiting the facility spend up to $48 off-site (*i.e. the likely off-site spend by patrons visiting district facilities – refer* Table 6). | Between NZ$ 7 and NZ$ 8 million | 5% |

**Source: Christchurch Visitor Strategy 2007.**
**Notes: *data sourced from SGL consulting report for Christchurch City Council.**

**TABLE 16.** RANKING OF OPTIONS AGAINST EVALUATION CRITERIA

| Options | Harmonisation with City of Christchurch aquatic facility investment and tourism strategies | Fit with community aspirations of aquatic facilities in New Brighton and New Brighton's perceived long-term role and function | Likely economic impacts on New Brighton | Practicality of delivery |
|---|---|---|---|---|
| Option 1: No Waterpark and ER&S facility located elsewhere in the East | Only has limited potential to attract additional interstate/international visitors to Christchurch, a clear objective of Council | Will not contribute to the seaside attractions in New Brighton, or help in enabling the centre achieve its role as a regional seaside attraction.<br>This option will not meet community perceptions and retail and other land use prospects for New Brighton are likely to continue dwindling | No spillover effects in New Brighton, and consequently, no prospects for its revitalisation | Will do nothing to revive retail spending in New Brighton |
| Option 2: Waterpark combined with the ER&S facility in New Brighton | Has the potential to attract additional interstate/international visitors to Christchurch, a clear objective of Council.<br>However, may undermine visitation to, and consequently, viability of, the planned metropolitan sports centre. | The aquatic facilities in themselves will meet community aspirations and will enable New Brighton's revitalisation.<br>There is some potential for spinoff private funding and reduction of crime and vandalism in New Brighton. Visitors will still be concentrated in one facility rather than being spread around in New Brighton.<br>Has the potential to increase visitation choice for visitors likely to reside at the planned tourist accommodation in the centre. | Large spillover effects in New Brighton of up to 11% of existing total retail turnover in catchment | Same comments as for Option 5 |
| Option 3: Waterpark only in New Brighton and ER&S facility located elsewhere | Has the potential to attract additional interstate/international visitors to Christchurch, a clear objective of Council.<br>However, may undermine visitation to, and consequently, viability of, the planned metropolitan sports centre and ER&S. | The aquatic facilities in themselves will meet community aspirations but potential for spinoff private funding and reduction of crime and vandalism is relatively low. Visitors will be concentrated in one facility rather than being spread around in New Brighton.<br>Has the potential to increase visitation choice for visitors likely to reside at the planned tourist accommodation in | Modest spillover effects in New Brighton of up to 6% of existing total retail turnover in catchment | Same comments as for Option 5 |

| Options | Harmonisation with City of Christchurch aquatic facility investment and tourism strategies | Fit with community aspirations of aquatic facilities in New Brighton and New Brighton's perceived long-term role and function | Likely economic impacts on New Brighton | Practicality of delivery |
|---|---|---|---|---|
| | | the centre. | | |
| Option 4: ER&S facility only in New Brighton (with extra water features) | Has some potential to attract additional interstate/international visitors to Christchurch, a clear objective of Council. | The aquatic facilities may meet community aspirations, and there is some potential for spinoff private funding and reduction of crime and vandalism in this option | Limited spillover effects in New Brighton of up to 4% of existing total retail turnover in catchment | From the perspective of the surrounding retail offer and community need perspective, this option appears one of the most superior amongst all |
| Option 5: 'Village' in a Waterpark | Has the potential to attract substantial numbers of additional interstate/international visitors to Christchurch, a clear objective of Council.<br><br>However, may undermine visitation to, and consequently, viability of, the planned metropolitan sports centre and ER&S. | Rejuvenating 'New Brighton' using its inherent strengths and positioning it as a seaside hub has the maximum potential to turn its fortune. Importantly, this option presents the best potential to leverage additional private sector funding and positive spillover effects on other land uses, especially residential development in the centre and help in reducing vandalism and crime due to an improvement in the overall urban fabric and amenity.<br><br>Has the potential to increase visitation choice for visitors likely to reside at the planned tourist accommodation in the centre. | Maximum spillover effects in New Brighton (up to 17% of existing total retail turnover in catchment) | Investor interest in funding this option may be limited given the surrounding retail offer and the scaled back, community focused role that New Brighton is expected to serve in the short term. Over this timeframe, this option appears impractical.<br><br>It must also be borne in mind though that existing research also points out that the Canterbury region needs only one additional facility by 2031 with a standard pool. Any more will perhaps constitute over-supply.<br><br>Over time though, and if decided by Council, dedicated efforts can be made to turn New Brighton's prospects by investing in facilities and services, which may render this option viable. |
| Option 6: Boutique salt water pool in New Brighton to complement ER&S facility elsewhere | Has the potential to attract some visitors to Christchurch, if facilities located close to the shore. If not, this option does not appear to have the potential to attract new visitors to New Brighton, let alone Christchurch.<br><br>Only has limited potential to promote | Has very limited potential to turn the fortunes of New Brighton or provide choice for visitors choosing to reside at the planned tourist accommodation in the centre.<br><br>Also has limited potential to reduce vandalism and improve amenity of | Very limited spillover effects in New Brighton of up to 1% of existing total retail turnover in catchment | Such a niche facility may not complement New Brighton's existing centre offering and retail offer |

| Options | Harmonisation with City of Christchurch aquatic facility investment and tourism strategies | Fit with community aspirations of aquatic facilities in New Brighton and New Brighton's perceived long-term role and function | Likely economic impacts on New Brighton | Practicality of delivery |
|---|---|---|---|---|
| | Christchurch as a 'prosperous' city | New Brighton centre. If provided on the shore, has limited potential for visitors to pass through the New Brighton centre | | |
| Option 7: All aquatic entertainment elements in New Brighton and a reduced scale fitness oriented ER&S facility elsewhere | Similar to Option 3 | Similar to Option 3 | Similar to Option 3 | Similar to Option 3 |
| Option 8: Scaled down 'Village' option | Over time, will emulate Option 5. | The potential for revitalising New Brighton may not be as high. Though, it provides the necessary lead time for an interventionist strategy to be implemented in New Brighton by Council which turns the fortunes of the centre.<br><br>Importantly, the gathering of community support to uphold the delivery of this option over time will enable ownership amongst local residents.<br><br>Over time, will emulate Option 5 | As the village concept cultivates over time, and involves the community, potential to provide modest spillover effects in New Brighton of up to 6% of existing total retail turnover in catchment | From the perspective of the surrounding retail offer and community need perspective, this option appears one of the most superior amongst all |
| Option 9: ER&S facility 'plus' | Similar to option 4 | Similar to option 4 | Spillover effects in New Brighton of up to 5% of existing total retail turnover in catchment | Similar to Option 4 |

# CONCLUSIONS AND RECOMMENDATIONS

Independent insight.

# 6 CONCLUSIONS AND RECOMMENDATIONS

Based on the discussion, the following observations are put forward:

–The seaside Village idea as outlined above is likely to generate the greatest spillover effect for New Brighton and indeed Christchurch, simply because there would be more spend opportunities in the area, and additionally, these tourists might spend extra time in Christchurch. Additionally, from the perspective of New Brighton, tourists would be distributed in the centre rather than funnelled into a particular attraction thereby promoting exposure to a wide variety of retail and services in the centre.

–This option also meets the vision of the New Brighton community to the utmost, and importantly, provides opportunities for positive spinoff effects on other land uses in the region as it may boost investment activity in neighbouring residential and commercial precincts once the urban form and amenity of the centre improves. Importantly, improvements in the urban form and amenity of the centre will be very beneficial for reducing anti-social behaviour in the region.

–In a variation to this theme, the scaled back 'village' option also presents some potential for turning the fortunes of New Brighton. Indeed, it appears a better alternative to the more ambitious full-scale option, as investments in facilities will be staged, allowing sufficient lead time for Council to implement an interventionist strategy if need be and garner community support to partner in the delivery of this option. Importantly, this option will not compromise visitation to the planned metro sports centre.

–Other options such as a 'blockbuster' Waterpark and/or a Waterpark incorporating an ER&S facility might also generate significant visitation to the area and consequently spillover effects in New Brighton, but they will not be as large in magnitude compared with the seaside Village idea. This is because, in each of these options, visitation will be funnelled to a particular facility, rather than distributed through the centre.

–Though these more ambitious options (Options 2, 3 and 5) hold promise for rejuvenating New Brighton's trading prospects and consequently the centre's viability and social-economic fabric, they may undermine visitation to, and consequently, the viability of the planned and committed metropolitan sports facility. Some visitors may be diverted to these 'blockbuster' options or the seaside village rather than to the metropolitan sports facility. The number of events and championships held at the metropolitan sports facility will however be a determining factor.

It is recommended that:

–Christchurch city Council pursues the revitalisation of New Brighton through staging the "Village in a Waterpark" concept, focusing on leveraging the centre's seaside location through a variety of attractions as distinct from a single 'blockbuster' attraction.

–The ER&S facility be located to optimise access and use from the sub-region, rather than subordinating these parameters to revitalisation objectives in New Brighton.

–In the event that a decision is made to build the 'Waterpark' concept in New Brighton, Council should try and provide the committed ER&S facility within the 'Waterpark'. This will maximise returns to committed investment.

–In the event that a decision is made to build the 'Waterpark' or indeed the 'village' concept in New Brighton, marketing efforts should be coordinated across agencies to leverage maximum visitation and returns.

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Water

# ATTACHMENT 3 - EXTRACTS FROM WATERPARK TEHNICAL INFORMATION

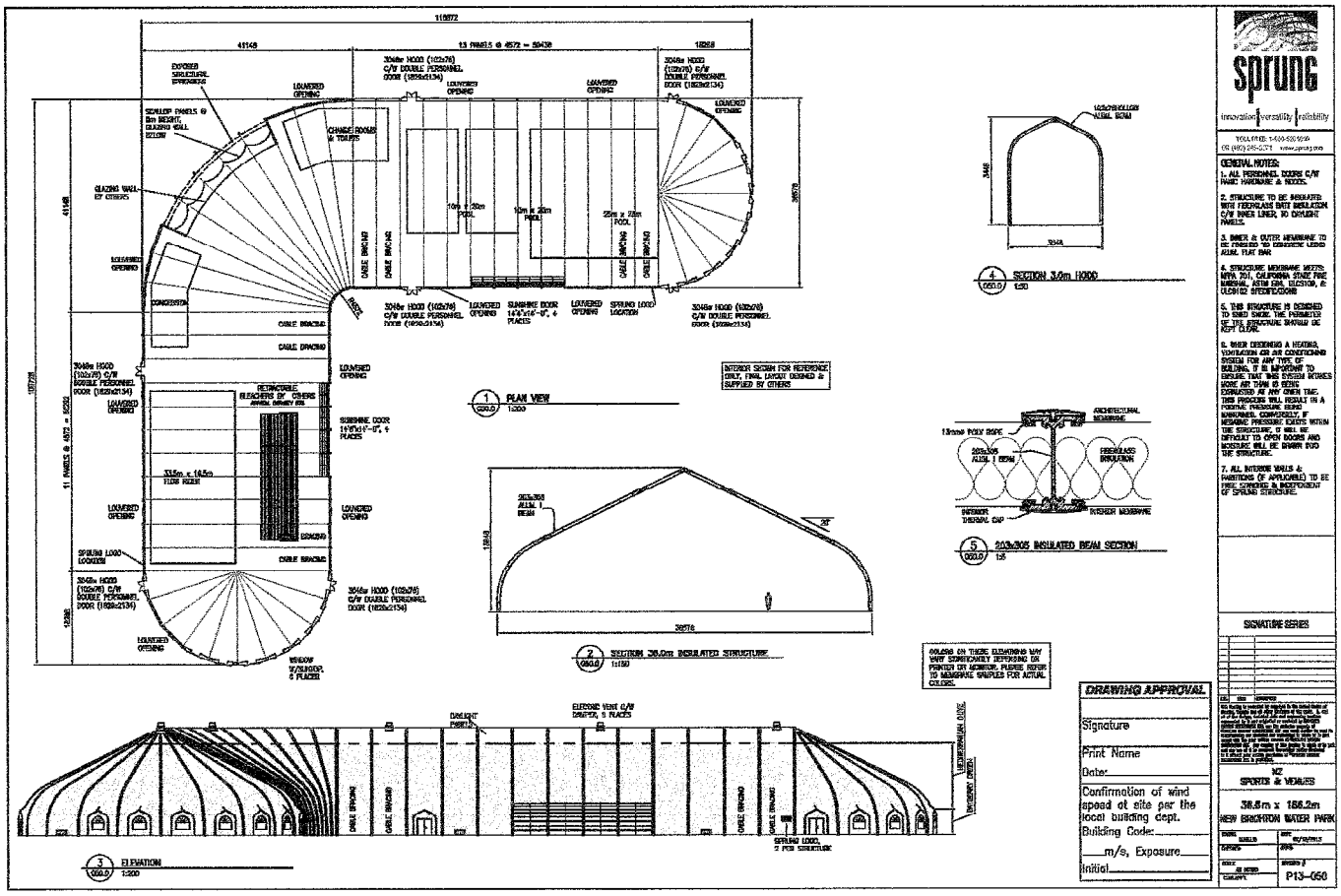
East and Sintes were not convinced that a typical Council-type leisure centre was what was required in this instance. They were looking for an aquatic centre/waterpark that was capable of revitalizing the commercial centre of New Brighton, long a concern of the city as a struggling area. Then, with earthquakes, a concern of the NZ Government, given the level of treatment nature had dealt out to the eastern suburbs.

Sintes and East challenged Direen with conceptualizing an aquatic/waterpark proposal that could be built for $35m.

He made contact with Sprung, OpenAire and Whitewater NZ. Their respective advice would be key to providing a waterpark/aquatic centre at a price the project could afford. The affordable capex would then lead into a opex that would make the facility sustainable in a manner which Council Leisure Centres could not match given the level of fees they are seemingly locked into.

## Sprung Instant Structures

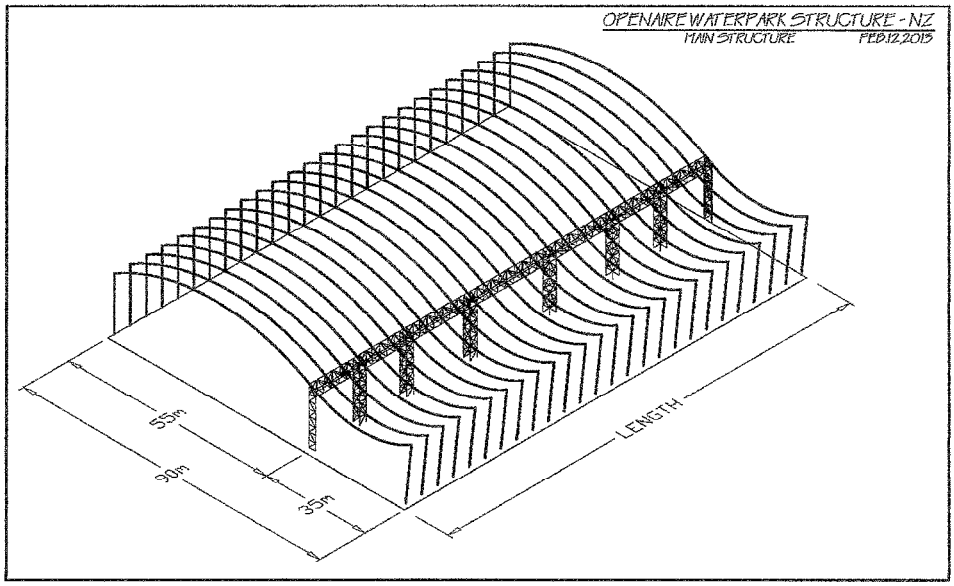
In consultation with Direen, Sprung contributed the following conceptual design:




This building is 196metres long. It spans 36.6m.
It is capable of covering a 25m x 25m laned pool, 2 x learn to swim pools, fitness gym, foyer, café, change rooms and can house a double Flowrider with spectator facilities. It can be built for $6m.
The fairground look is exactly what New Brighton needs. Destination tourism par excellence!

**OpenAire Inc**

Direen's next challenge was to deal with the prevailing easterly wind.
Discussions with OpenAire at Orlando grew into OpenAire providing a design for a retractable roof constructed from polycarbonate material and a glass retractable front wall facing the Pacific Ocean.




The initial design, shown here, measuring approximately 120m x 90m at a height of 18m was intended to cover the waterpark section of the facility plus the aquatic the cost would be circa $10.0m.
Utilising the Sprung structure in conjunction with the higher part of the OpenAire structure, thus removing the lower aquatic centre portion, would save approximately $4.0m.
The decision was made to keep the larger figure in the capex budget. The size and location of the eventual waterpark project was still far away from being determined.

OpenAire's retractable roofing system will, in it's own way, prove to be as much an attraction to the waterpark as the waterpark equipment itself.

**Whitewater West**

The world's leading waterpark equipment designer and supplier.
Direen consulted with Whitewater NZ in determining the cost of equipment chosen to guarantee the success of the waterpark as a destination and for the revitalization of New Zealand.

He shortlisted a Super Bowl variant, a Rattler and a Boomerango to go with a Ross Maguire designed river, lagoon and beach.

In acknowledging that the waterpark must also have at least a double Flowrider static wave but realizing that the capex budget would struggle to accommodate such an option, Direen determined that this, along with the café and entertainment opportunity, should be part of a third party provision joint venture.

## Capex

**Build target $35.0m**

**Budget Scenario**

| | | | |
|---|---|---|---|
| Sprung | | | |
| 25m x 25m x 2m pool (10-lane + sport) | | | |
| 25 x 12.5 Learn to Swim pool | | | |
| 25m x 12.5m Activity pool (rise & fall floor | | | $10.0m |
| Gym, change, entry 900m2 @ $2000 | | | $ 1.8m |
| Waterpark | | | |
| River/lagoon | $3.0m | | |
| Beach | $1.0m | | |
| Aquaplay 1750 | | | |
| Includes 3 x slides | | | |
| 109 total features | | | |
| 618m2 required | $1.5m | | |
| Rattler & Boomerango | | | |
| same access tower | $2.0m | | |
| Bowl | $0.9m | | $ 8.4m |
| OpenAire retractable roof, sea wall | | | |
| Panel walls 2-sides | | | $10.0m |
| Outdoor spas | | capped at | $ 3.0m |
| Landscaping | | | $ 1.5m |
| Total | | | $34.7m |

3rd party:
Flowhouse
Double Flowrider circa $3.0m
Café, entertainment area to be determined

Notes:
Some fees would be covered, others to be determined
Gym could be excluded
Design work needs to begin with waterpark design (Whitewaterwest)
OpenAire and Sprung could be handled as design-build pre-engineered
Structures, which would include mechanical air-handling.

Architect and water mechanical engineering needs to be allowed for.
Architect required to add value to Whitewaterwest, Sprung and OpenAire.
Recommend RMBH Architects.

## Opex

Preliminary operational budget

| | | | | | |
|---|---|---|---|---|---|
| Charges | waterpark | $10 | | | |
| | conventional pools | $ 5 | | | |
| Givens | conventional pools | 6am to 9pm | | | |
| | | 2 shifts | | | |
| | | 2 staff per shift | | | 6.0 fte |
| | waterpark | 6am to 9pm | | | |
| | spas | 2 shifts | | | |
| | | 1 staff per shift | | 3 fte | |
| | lagoon | 2 shifts | | | |
| | | 1 staff per shift | | 3 fte | |
| | rides | 4pm to 8pm M-F | | | |
| | | 4 x 5 x 40 wks x 3 | 2400 | | |
| | | 10am to 8pm W/E, Hols | | | |
| | | 10 x 104 x 3 | 3120 | | |
| | | 10 x 60 x 3 | 1800 | | |
| | stats | 6 x 10 x 3 | 180 | | |
| | | | 7500 | | |
| | | | /2080 | 3.6 fte | 9.6 fte |
| | supervisors | | | | 2.0 fte |
| | | | | | 17.6 fte |
| | customer service | | | | |
| | M-F 6am to 9pm | 3 per day | | 3.0 fte | |
| | W/E 6am to 9pm | 3 x 2 days | | 1.3 fte | |
| | Office | | | 1.0 fte | 5.2 fte |
| | Management | | | | |
| | Manager | | | 1.0 fte | |
| | Assistant Managers | | | 2.0 fte | 3.0 fte |
| | Holidays | | | | 1.6 fte |
| | Staffing | | | | 27.4 fte |

Financial

| | | | | |
|---|---|---|---|---|
| Income | | | | |
| | 600,000 customers | $10 | $6.0m | |
| | 300,000 customers | $ 4 | $1.2m | |
| | Rent | | $200k | $7.4m |
| Expenditure | | | | |
| | Staffing | 28.0 fte @ $50k | $1.4m | |
| | Energy | 500k | | |
| | Rates | nil | | |
| | Water Treatment | 200k | | |
| | Cleaning | 100k | | |
| | Maintenance | 100k | | |
| | General | 1 million | $1.9m | $3.3m |
| Excess income over expenditure | | | | $4.2m |

**Location and Geotech**

The location has yet to be determined.
It follows that land costs or geotechnical surveys have not been included here.
Accordingly the size of the waterpark has yet to be determined.

However, the cornerstones of the concept have been established.
Costs for OpenAire, Sprung, Whitewater and RMBH can be fixed with reasonable surety.
The design work, size and material choice can be varied in order to build to the budget.

Income might well be a great deal more than has been budgeted. Same applies for costs.
The real challenge opex-wise will be to maximize the income and minimize the expenditure.

**In Conclusion**

The New Brighton Waterpark Proposal as conceptualized here is certainly not intended to be an aquatic centre with just a few water toys on the side. This is a waterpark with elements of aquatic centre attached which is fundamental to what we are looking for and to what we believe Christchurch and New Brighton needs.



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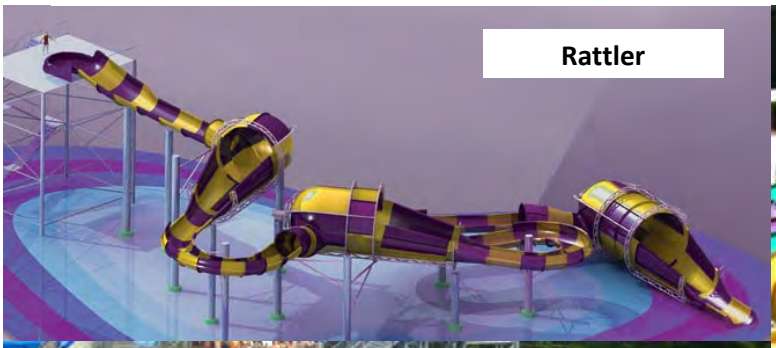
**Examples of slides referred to above (additional information, not shown in the proposal)**






# ATTACHMENT 4 - 'VILLAGE IN A WATERPARK' Information from proponents

**Images and concepts are indicative only**





**Concept:**

A variety of aquatic or seaside themed attractions surrounding a central commercial core, encouraging movement through the shopping area.

Builds upon existing water attractions and reflects the size / nature of New Brighton suburb.

Concepts are very preliminary. The proposal to construct salt water hot pools is the most advanced - see overleaf.

# ATTACHMENT 4 continued - VILLAGE IN A WATERPARK - Information from proponents



## Salt Water Hot Pools:

The original concept sketch (top) has been further developed and the idea now comprises three outdoor salt-water pools set on the edge of the beach.

The pools, plant rooms and buildings are constructed offsite. Because these are modular pools they can be relocated later if required, while satisfying potential immediate demand in the short to medium term.

Potential synergies with the local, adjacent surf club facility could be investigated to provide a shared changing, reception and staffing areas, thus reducing land use and development costs. A separate proposal has been developed for a 25m modular pool for this facility.

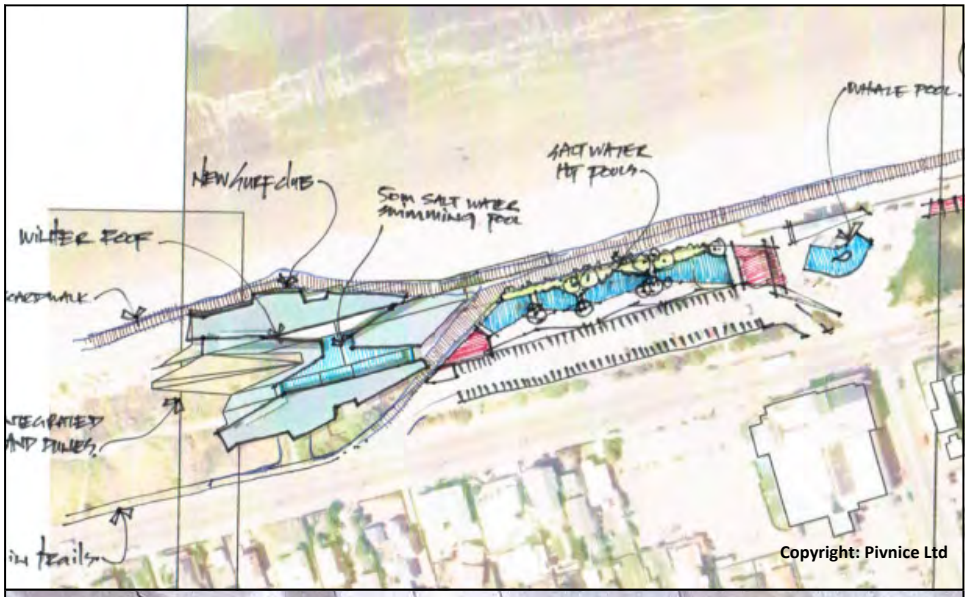
The proposal is a preliminary concept. It includes three to four pools with a temperature range of 38—40 degrees alongside modular ancillary main pool buildings (reception, changing facilities, staff and administration areas).

Pools range in size from 36sqm to 58sqm.

Bather capacity is 75 - 100 people.

The surrounding areas would be landscaped to incorporate the local profile and flora and would be intersected with access walkways (potentially modular).

New Brighton is closer to the larger market than other developments such as Hanmer Springs (75% of patrons are from Canterbury region).





Requires lease from CCC of a portion of the existing car park. Seeking a 'soft start' lease over the initial term to allow the operator to spend more on business promotion.

To encourage initial investigatory investment, an early statement of city council position in principle would be preferable and would allow for development of a brief and completion of feasibility studies.

The feasibility study would determine actual size and scale.

**Initial estimated cost:**

- Standalone development (not part of surf club redevelopment): $3,829,000 + GST (not including café)

- Surf club synergy: $2,990,600 + GST.

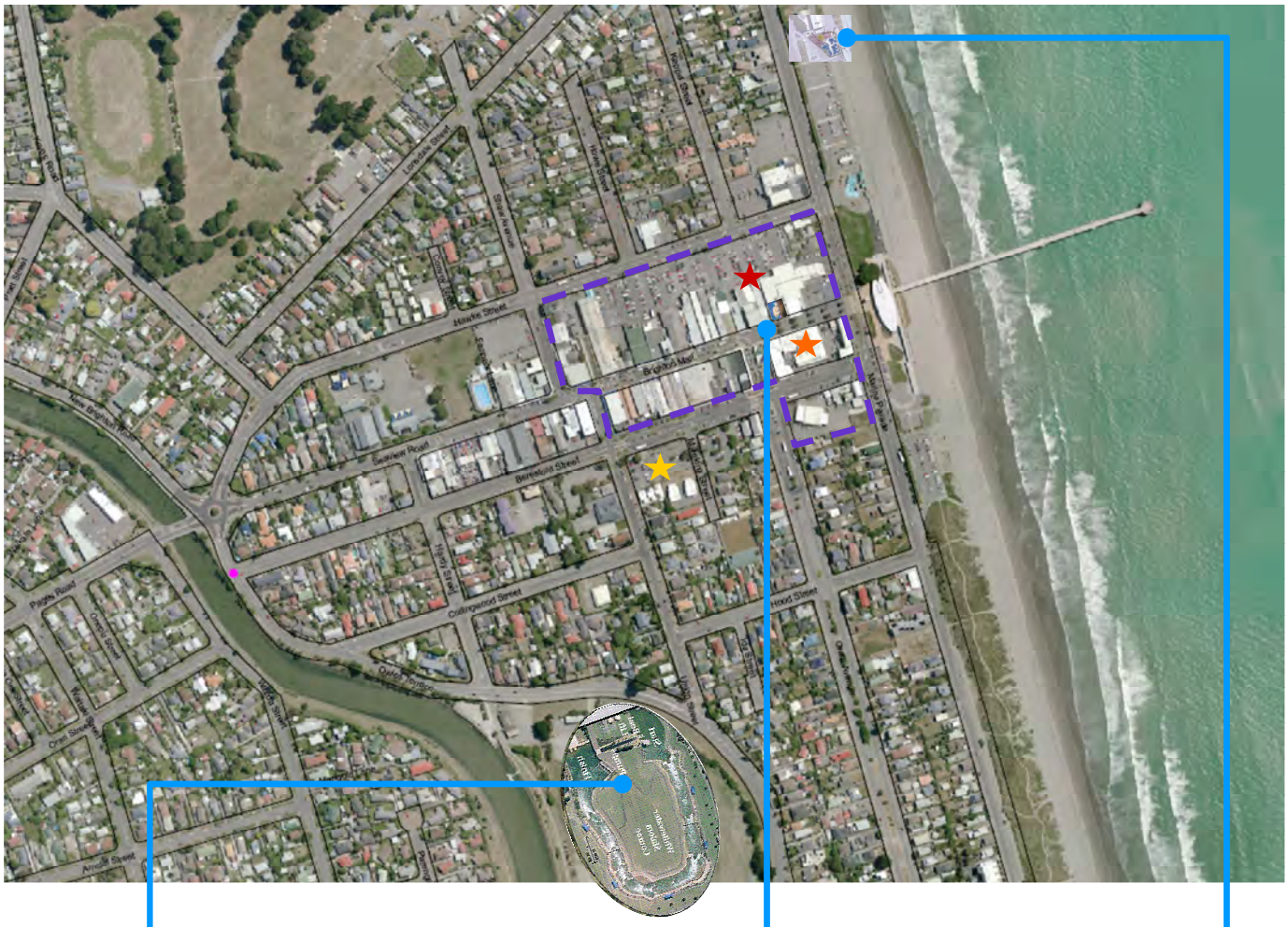
A **feasibility study** would Include: market research to confirm critical components, target market, scale of commercial opportunity); the design and cost estimate; financial analysis (return on investment), and energy study. There may be potential to add on as the business grows. Initial investment to determine feasibility would be $37,200 +gst with a further second stage study if viable after stage one of $25,760 +gst. Total: $62,960 + GST

# ATTACHMENT 5 - INDICATIVE OPTION 8 AS ASSESSED BY CONSULTANTS

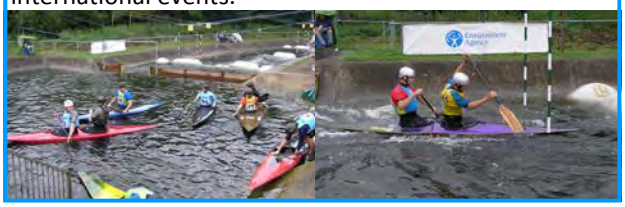
This outline shows a possible distribution of funds to support boutique/unique aquatic leisure attractions in New Brighton. The concept encourages pedestrian flow into and through the centre.

**The ideas are indicative only**. The possible new attractions for New Brighton are a salt water hot pool development; a redevelopment of Brighton Mall - in this example including a bold and innovative splash pad; and a privately funded attraction on the river edge (the example of a white water course is shown below).

Other non-aquatic proposals are shown as stars.




Artificial white water course, suitable for national and international events.



Aquaplay with a difference –as part of redevelopment of Brighton Mall. Eg day/night; discovery stream to reinforce river to sea connection.

Hot salt water pools

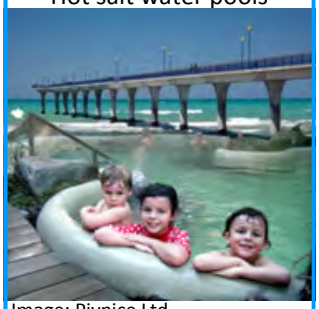


Image: Pivnice Ltd

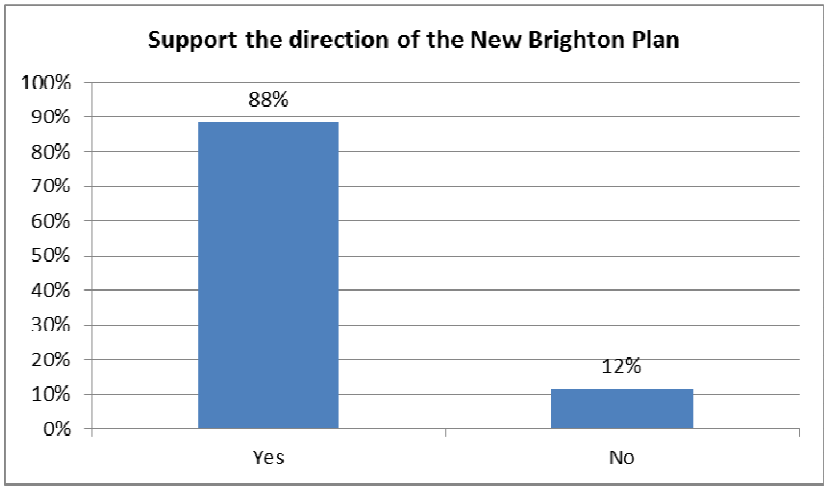
★ Proposed market (NBBLA)

★ Oram Ave extension - budget approved for land purchase. When developed, will enable sheltered café /pedestrian space

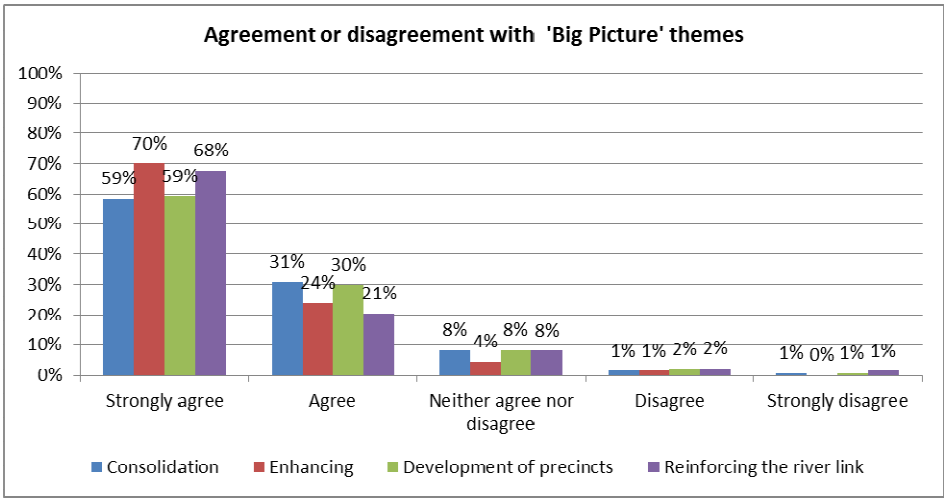
★ Proposed bus interchange

**ATTACHMENT 6 – EXTRACT FROM SUMMARY OF SUBMISSIONS, DRAFT NEW BRIGHTON CENTRE MASTER PLAN**

## *Big Picture*




There was strong support for the direction of the plan. Eighty eight percent of people stated yes when asked if they overall support the direction of the plan.




Respondents were asked how much they agreed or disagreed with the Big Picture Themes. At least 89% of people or more agreed or strongly agreed with each of the Big Picture Themes.

## Consolidation of the centre through rezoning of land

Agree: 90%; Ambivalent: 8%; Disagree: 2%

**Best aspects**

*Comments 49*

Respondents generally supported the consolidation of the centre. Some also provided reasons for their support. Supporting reasons included that it will contribute to a better community feel in the area by making it more efficient, viable, people friendly and interactive.

*The reduction and consolidation of the retail area into a more village like (sic) which will enhance contact amongst community.*

Respondents suggested the number of shops should decrease to ensure the premises are better looked after and that there is a good fit of shops that the residents can support.

*… reducing the number of commercial properties is essential. Rundown/empty shops destroy the momentum.*

Commercial centre consolidation was also supported, because it would create more space for other land uses such as residential.

**Improvement suggestions**

*Comments 10*

Improvement suggestions for centre consolidation included the process that will be taken in the rezoning, the scale of the consolidation and future development considerations. Three respondents suggested that the Council should take over control of the land to ensure that a uniformed approach is taken to the rebuild. Others also expressed concern about the amount of time that might be involved in the plan change process.

*That, after rezoning land in accordance with the plan, the Council facilitate redevelopment by establishing a revolving land purchase fund to buy property to amalgamate titles or extinguish existing use rights, the land to be on-sold (or leased) for development under the new zoning.*

Others think that even though consolidation is needed, the scale involved in the plan is too excessive. Respondents stated that there will need to be consideration as to how future development will be allowed for, that if more people are attracted to New Brighton due to the Draft Plan's success then consolidation may be short sighted.

## Development of precincts: entertainment, retail/commerce and residential while encouraging mixed-use activities

Agree: 89%; Ambivalent: 8%; Disagree: 3%

**Best aspects**

*Comments 20*

Development of precincts: entertainment, retail/commerce and residential was generally supported by respondents. Some stated that it would bring more cohesion between different parts of the area.

*The creation of precincts will give the area more cohesion and will hopefully bring new development into the business area.*

Some respondents supported the concept of mixed-use activities, particularly a mix involving retail/office and residential.

*Development of precincts, entertainment, retail/commercial and residential (with mixed-use activities) is also supported…*

**Improvement suggestions**

*Comments 4*

There were limited comments from respondents about how this theme could be improved. Statements were made about having mixed-use throughout the area, meaning that residents could play a role in monitoring the area, the need to incorporate more green/open space and make better use of the foreshore by including it in the plan as an entertainment precinct.

*Would like to see a mixed use of residential and commercial all throughout the area e.g. like Sydenham, apartments above. Check out other seaside towns around the world. Not put into separate areas.*

*…Our suggestion is to allow a mixed retail/office and residential zone on Seaview Road's south side between Union Street and Oram Avenue.*

One respondent raised the concern that this theme was entirely dependent on landowners to put into action.

> *Theme #3 depends entirely on landowners as to all but the last of these "development stars", so the role of the Council in devising actual business cases is minimal.*

## B5 New residential development

Agree: 79%; Ambivalent: 15%; Disagree: 5%

**Best aspects**

*Comments 28*

There was general support for new residential development. Respondents that commented on this action supported the transfer of unused commercial areas to residential.

> *The plan to rezone part of the commercial area for residential purposes is to be commended. The economic assessment makes it abundantly clear that New Brighton has far more commercial space than it requires, and the surplus of commercial premises used for low-grade commercial activity detracts from the viability of the centre as a whole. Replacement of non-viable commercial buildings by housing would be positive socially and commercially.*

**Improvement suggestions**

*Comments 20*

There were a number of respondents who commented on the need to incorporate housing with the commercial area to improve the use of the area and provide a higher level of surveillance for security, especially at night time.

> *New Residential development is an improvement but we feel the area along the south side of Seaview Road from Union Street to Oram Avenue should also include residential living to reduce the crime issues currently exacerbated by the lack of activity in this area, leaving dead spots and darks spots. Apartments above the retail shops would reduce this concern.*

Respondents also expressed concern about the types of housing development in the Draft Plan. Some suggested that mid-level priced housing would be more appropriate, while a few stated the need for improved affordable housing.

> *Why have low cost housing? we are not all poor over here for many it is a lifestyle choice. Mid-level housing would add appeal and uplift the area. Low cost housing reeks of potential slum type living. Low rise quality apartments for professional couples and smaller quality homes that will attract back older people who have been forced from their homes but wish to stay in the area*

One respondent suggested the Council should take on the role of a proactive investor, or be involved in joint ventures to encourage development in the area.