

Sumner

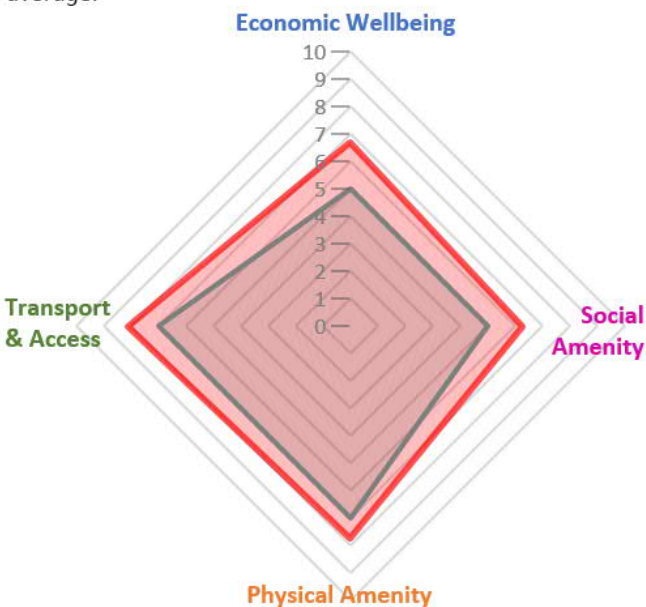


CENTRE STATISTICS	Sumner				Neighbourhood Centres Average
	2004	2010	2016	+/- (2010-16)	2016
<i>m² unless otherwise stated</i>					
Zoned Land Area	20,555	14,528	20,386	+5,858	32,948
Built Area	6,108	8,711	8,857	+148	11,414
Average Plot Ratio	-	0.60	0.43	-0.17	0.35
Retail Space	2,670	4,646	4,170	-476	8,998
Ground Floor Units	-	39	46	+7	32
Operative Businesses	-	-	43	-	31
Vacant Land	-	-	2,034	-	2,583
Vacant Floorspace	-	0	0	-	787
Vacant Units (No.)	0	0	4	+4	3
<i>Street Frontage (m)</i>					
Active	-	-	415	-	532
Vacant	-	-	24	-	47
<i>Land use monitoring data, CCC</i>					
Business Count	102	105	69	-36	90
Employee Count	318	312	194	-118	570
<i>Longitudinal Business Frame data, StatsNZ</i>					

COMPARISON WITH OTHER CENTRES

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

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



Sumner has its own modest local catchment but is also a notable coastal destination. Reflecting this, there is a diverse range of hospitality venues, and niche retailing however the retail function is viewed as small for its size.

Natural coastal amenity does not flow into centre, with Burgess and Marriner Streets having a quiet residential feel instead of the vibrancy and bustle expected of these beach connections. As set out in the Sumner Village Masterplan, improving pedestrian connectivity within the centre is an objective. Streetscapes are serviceable but showing signs of age and there was a notable decline in vegetation cover since the earthquakes.

The new community centre/library looks good but highlights the tired state of some of the existing buildings. New homes and apartments underline the competition for land which is also reflected in above average rents. The decision to develop a skate-park at Nayland Street has the potential to add vibrancy and activity on this edge of the centre.

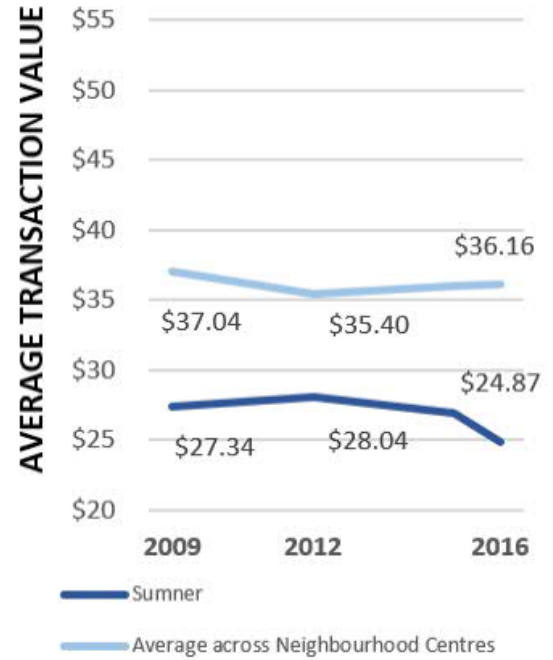
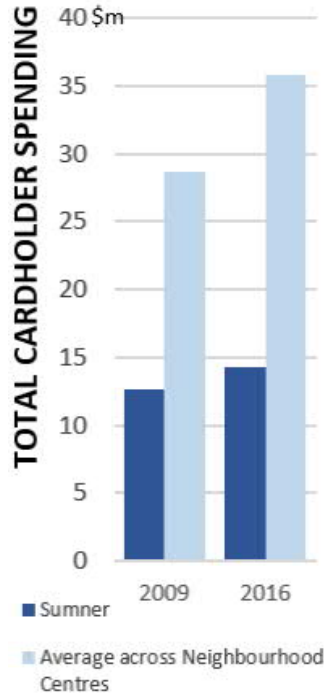
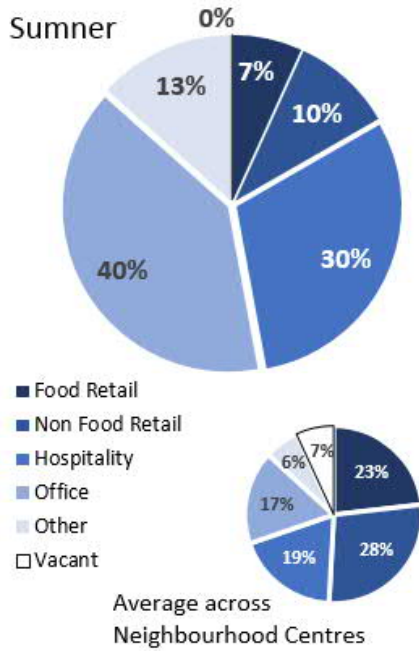
With good public transport and coastal path cycle connections, Sumner is highly accessible although, in common with most resort centres, parking can become a seasonal issue. The reopening of Evans Pass will be an important milestone for Sumner and Lyttelton although existing road safety risks on Sumner's Wakefield Ave approach need to be recognised.

In summary, Sumner remains an understated coastal centre with a lot of appeal as a place for people to visit. However, leakage of spending to other centres and a need to modernise existing retail provision remain as key challenges together with improvements to pedestrian connectivity.

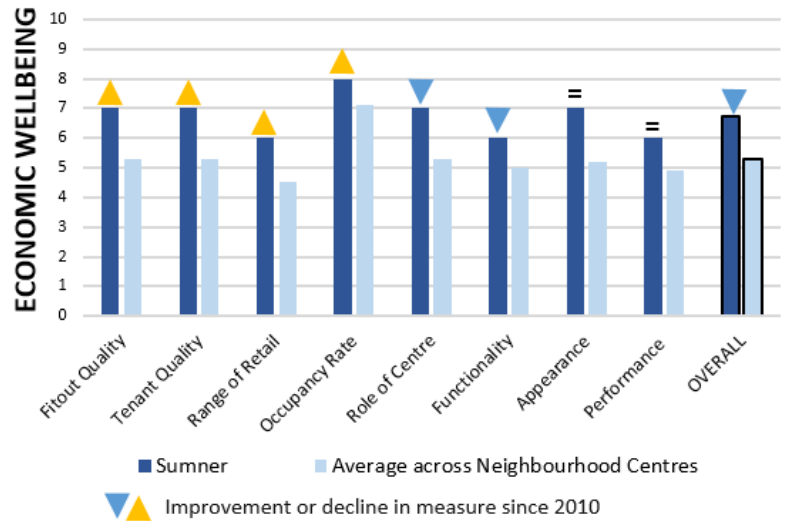
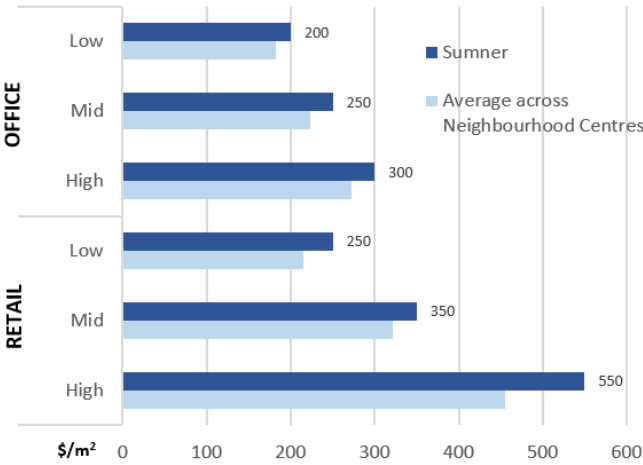
<p>STRENGTHS</p> <ul style="list-style-type: none"> • Coastal resort appeal and an affluent catchment. • New Community Centre and Library • Substantial hospitality sector 	<p>WEAKNESSES</p> <ul style="list-style-type: none"> • Underdeveloped retail offering for the centre's size. • Very complex pattern of land ownership • Existing building stock is aging and low rise. (+opportunity)
<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> • Under-exploitation of the natural coastal amenity • Planned Investment through Suburban Centres programme 	<p>THREATS</p> <ul style="list-style-type: none"> • Natural Hazards • Competition from other centres along its transport corridor

ECONOMIC WELLBEING

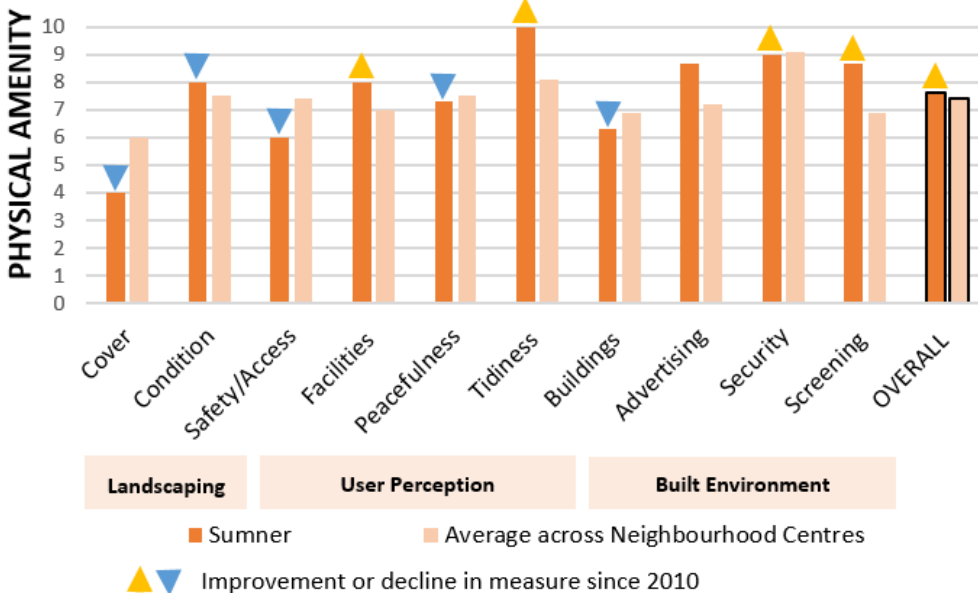
FLOORSPACE COMPOSITION



GROSS RENTS



PHYSICAL AMENITY



SOCIAL WELLBEING

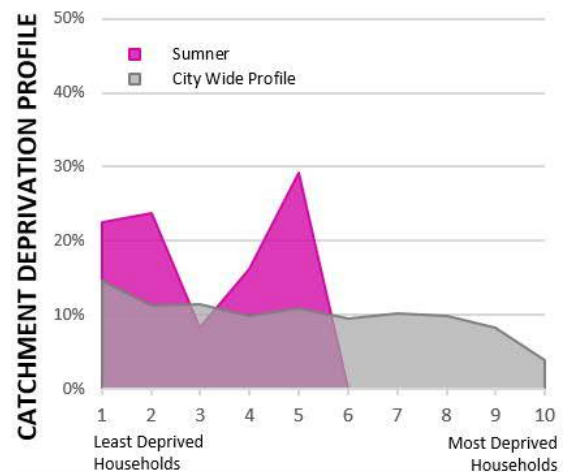
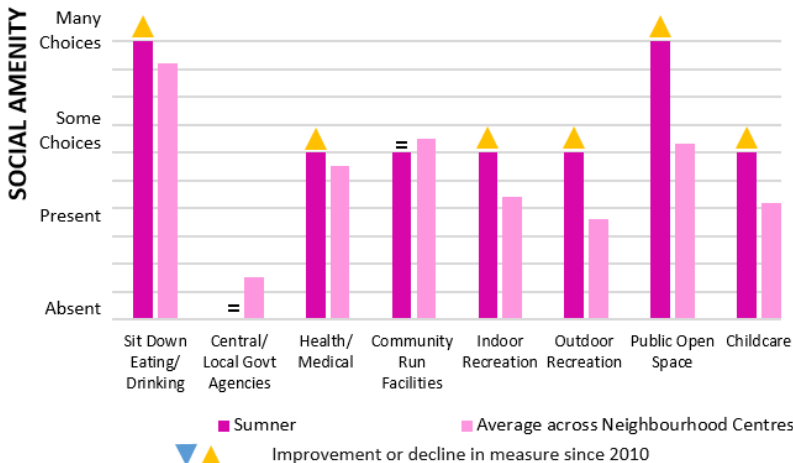
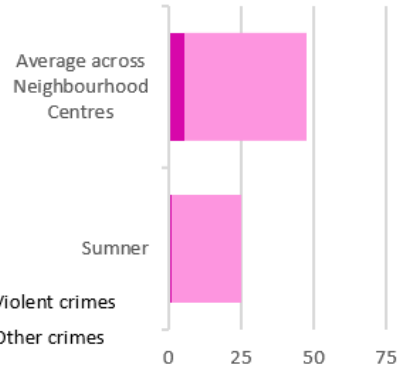


CATCHMENT STATISTICS

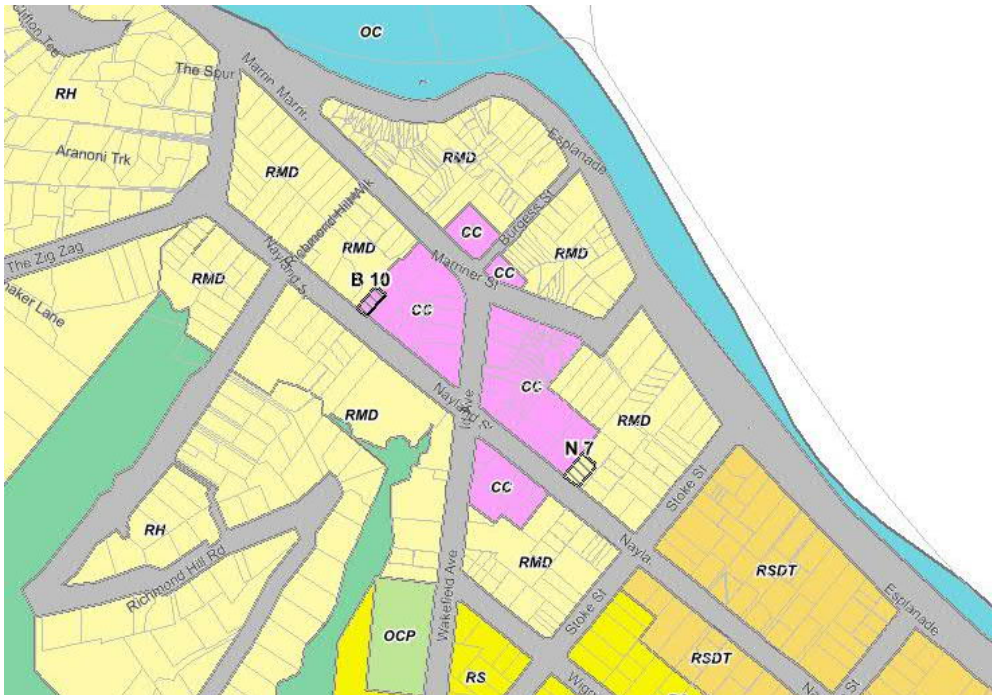
(Census, StatsNZ)

	Sumner			Neighbourhood Centres Average
	2006	2013	+/-	2013
Households within 400m of centre	465	360	-105	607
Household Density (houses/hectare)	7.7	5.9	-0.173	9
Residents within 400m of Centre	999	819	-180	1,468
Residents under 15yrs	18%	19.8%	+1.8%	16%
Residents over 65yrs	12.9%	13.9%	+1.0%	16%
Average Car ownership per household	0.973	0.96	-0.01	1
Average Households with no car	6%	4%	-1.6%	9%
Average Household Income	\$68,340	\$81,670	+\$13,330	\$62,325
Residents on Social Welfare	6.0%	4.4%	-1.6%	10%

CRIME



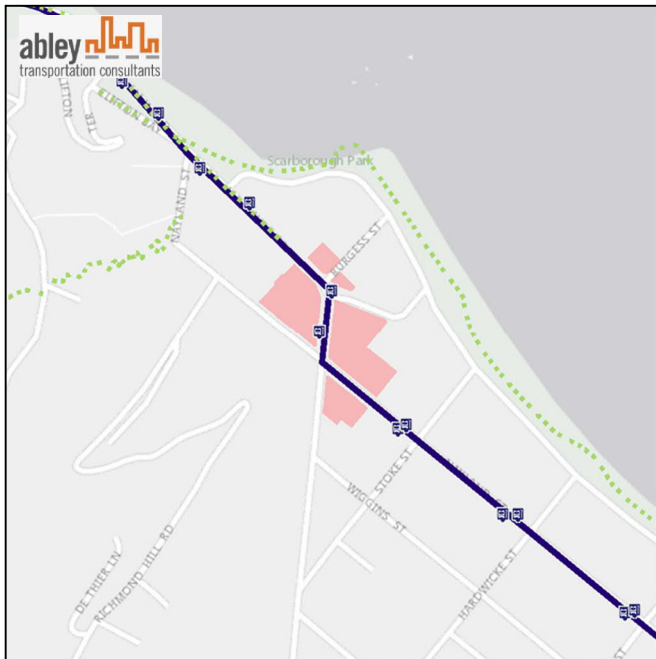
LAND USE ZONING



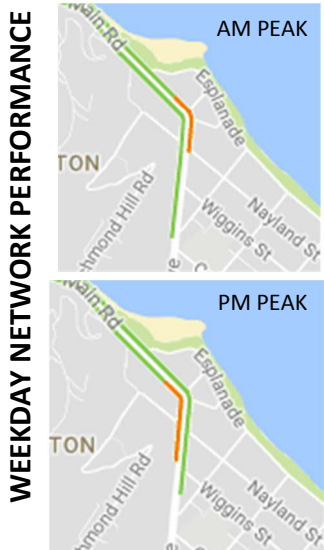
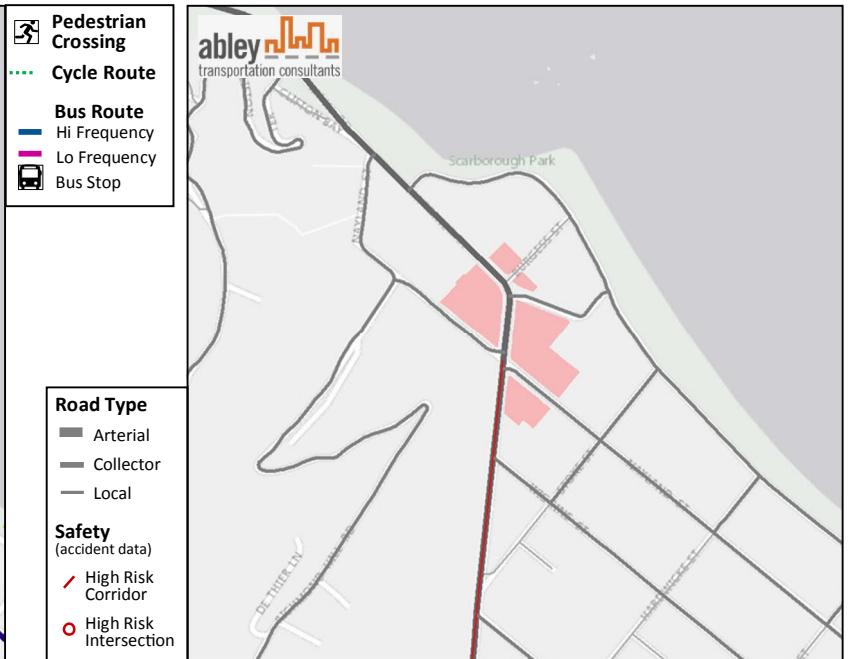
- Zone**
- CC Commercial Core Zone
 - OC Open Space Coastal Zone
 - OCP Open Space Community Parks Zone
 - ON Open Space Natural Zone
 - OWM Open Space Water and Margins Zone
 - RH Residential Hills Zone
 - RMD Residential Medium Density Zone
 - RS Residential Suburban Zone
 - RSDT Residential Suburban Density Transition Zone
 - RuPH Rural Port Hills Zone
 - SPS Specific Purpose School Zone
 - Transport Zone

TRANSPORT AND ACCESS

NETWORK ACCESSIBILITY



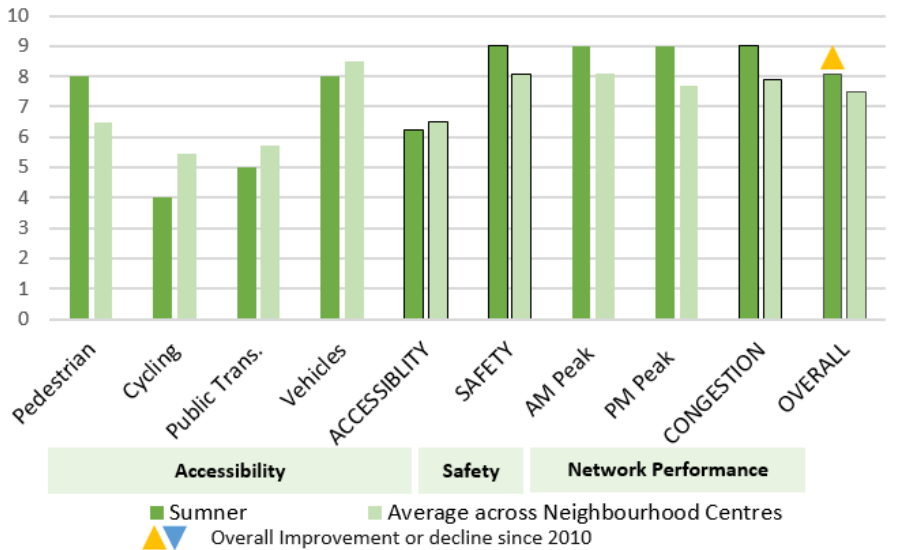
NETWORK SAFETY



CONGESTION

- None
- Light
- Medium
- Heavy
- Very Heavy

TRANSPORT OVERVIEW



COMMERCIAL CENTRE FACTSHEETS: Information Guide**OVERVIEW**

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

The centres considered in this review exercise — as mapped and listed on the back page — are grouped reflecting the roles and functions that are envisioned in the District Plan¹ as set out below.

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

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

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

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

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

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

FACTSHEET FORMAT AND COMPONENT INFORMATION

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

1 Centre Name and Type

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

2 Aerial Photo

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

3 Comparison Diagram

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

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

4 Commentary text

Centre description drawing on interpretation of information presented in the factsheet, site visit observations and comments from specialist consultants. Summary table draws out strengths, weaknesses, opportunities and threats relevant to the centre.

5 Centre Statistics

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



ECONOMIC WELLBEING

6 Floorspace Composition

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

7 Total Cardholder Spending

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

8 Average Transaction Value

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

9 Gross Rents

Average, upper and lower quartile rents for office and retail space in the centre in \$ per m² compared to averages of the centre type. *CBRE, Retail and Office Rental report (for CCC, June 2017).*

10 Economic Wellbeing

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

PHYSICAL AMENITY

11 Physical Amenity

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

12 Centre Photos (Amenity focused)

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

SOCIAL WELLBEING

13 Social Wellbeing Map

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

14 Catchment Statistics

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

15 Crime

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

16 Social Amenity

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

17 Catchment Deprivation Profile

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

18 Land Use Zoning

Extract from current Christchurch District Plan.

TRANSPORT & ACCESS

19 Network Accessibility

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

20 Network Safety

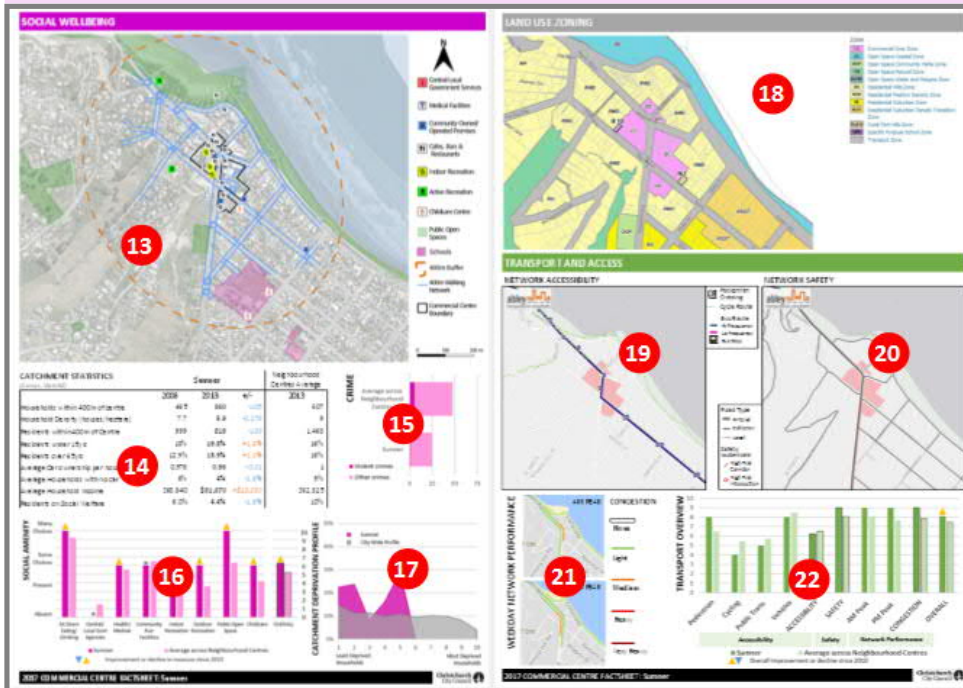
Mapping of Road types overlaid with high risk corridors and intersections defined in the KiwiRAP (Road Assessment Programme). *Abley Consultants - Commercial Centre Transportation Assessment Report (for CCC, 2017) using KiwiRAP data (AA/NZTA/ACC/NZ Police/MoT)*

21 Network Performance

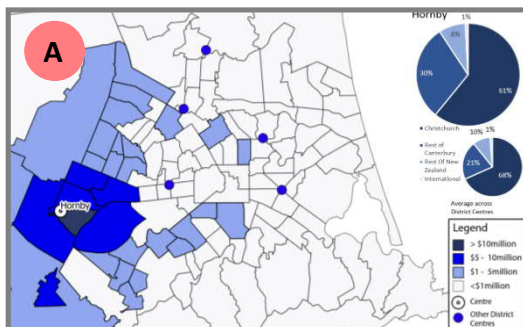
Mapping of peak time congestion at morning (0830) and evening peak (1700) times. District Centres include a Saturday lunchtime peak (1230-1430) map. *Abley Consultants - Commercial Centre Transportation Assessment Report (for CCC, 2017) using Google Maps traffic counts mapping.*

22 Transport Overview

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



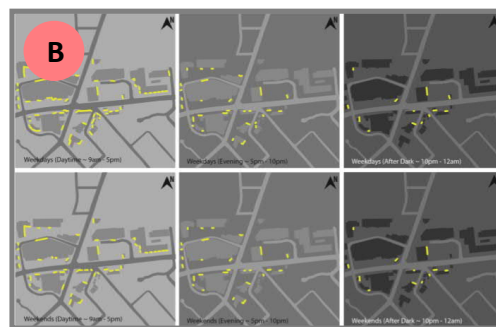
ADDITIONAL DISTRICT CENTRE FACTSHEET INFORMATION



A Sources of Spending

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

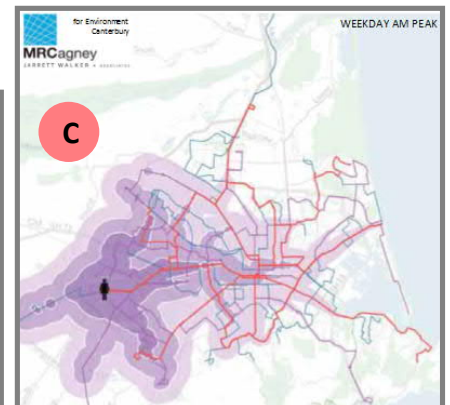
Marketview, Retail Centre Spending (for CCC, April 2017)



B Active Street Frontages

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

CCC Monitoring and Research, Ground Floor Activity Study (2017)



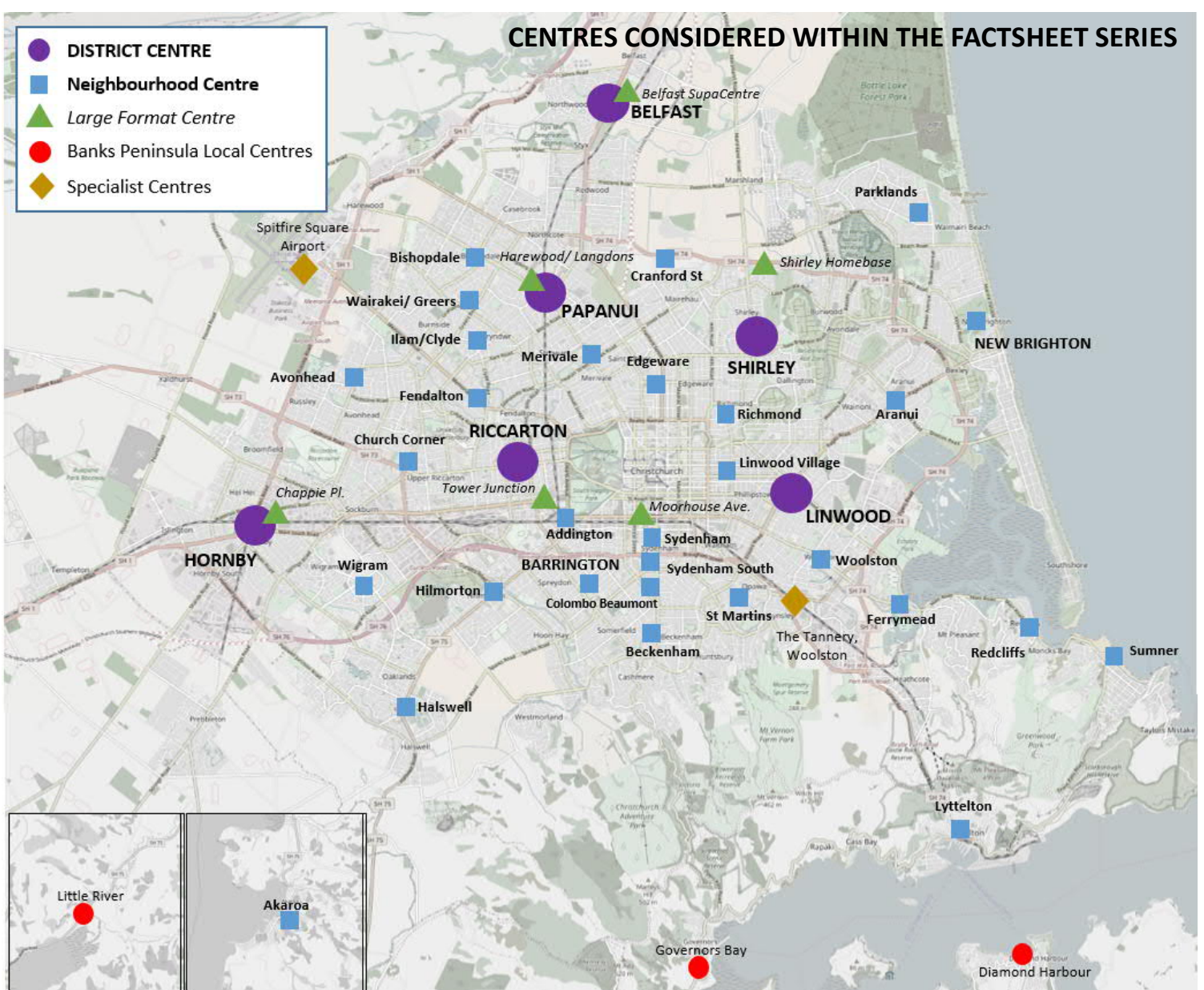
C Public Transport Reach

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

MRCagney Consultants - Transit Alternative Report (for ECAN, Nov 2015)

CENTRES CONSIDERED WITHIN THE FACTSHEET SERIES

- DISTRICT CENTRE
- Neighbourhood Centre
- ▲ Large Format Centre
- Banks Peninsula Local Centres
- ◆ Specialist Centres



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

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

- Large Format Retail Centres**
(part of District Centres where indicated)
- Chappie Place, **HORNBY**
- Moorhouse Avenue
- Harewood & Langdons Road, **PAPANUI**
- Shirley Homebase
- Tower Junction
- Other Centres**
- Specialist**
- The Tannery, Woolston
- Spitfire Square, Airport
- Banks Peninsula**
- Church Bay/Diamond Harbour
- Governors Bay
- Little River

KEY ACTIVITY CENTRES

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

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

KACs are shown in **CAPITALS**.

DISCLAIMER - While every effort has been made to ensure the information presented is accurate, the Christchurch City Council gives no guarantee that the information in any Commercial Centre Factsheet contains no errors. The Council shall not be liable for any loss or damage suffered consequent upon the use directly, or indirectly, of the information supplied in this publication.

REPRODUCTION OF MATERIAL - Any table or other material published in the Commercial Centre Factsheets may be reproduced provided acknowledgment is made to this source and the original data source where appropriate.