13. RETAILING IN CHRISTCHURCH

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The purpose of this report is to update the Committee on retailing in Christchurch, presenting recent retail floorspace findings and shop frontage results. The report has been resubmitted to include some projections of retail floorspace for the city.

RETAIL FLOORSPACE 2000

A retailing study was conducted during 2000 investigating the amount of retail floorspace in the city by City Plan zones. Retail floorspace is an indicator of the distribution of retail activity throughout Christchurch. The definition of retail for this study covered retail shops, supermarkets, petrol stations and cafes and restaurants.

Table 1. Retail Floorspace in Christchurch City, 2000

City Plan Zone	Retail Floorspace (sqm)	Floorspace %
Central City Zone (CC)	329,278	34.4
District Centres (B2 with adjoining B1)	342,527	35.7
Local Centres (other B1)	82,521	8.6
Suburban Industrial zone (B4 only - not B4T & P)	75,205	7.8
Retail in all other zones	128,776	13.4
Christchurch City	**958,307**	100.0

Source: Quotable Value NZ

Some of the key findings were:

- Christchurch City has a total retail floorspace of 958,307 sqm (Table 1). This is a ratio of approximately 2.9 sqm per person[1].

- Christchurch's Central City zone is the largest shopping precinct in the city with a total retail floorspace of 329,278 sqm. This is equivalent to 34% of the city's total retail floorspace (Figure 1).

- Combined, the 28 District Centres identified in the City Plan have a similar proportion of retail floorspace to the central city. Over 35 per cent of all retail floorspace in the city is distributed across malls and their adjoining shops ranging in size from Papanui/Northlands (the largest at 47,000 sqm), down to small centres (like Fendalton and Redcliffs) of around 1000 sqm. The five largest centres by retail floorspace are identified in the table below (Table 2).

Table 2. Five Largest District Centres by Retail Floorspace

District Centre	Floorspace (sqm)
Northlands Mall and Papanui shops	46,951
Westfield ShoppingTown Mall and Riccarton shops	37,863
Bush Inn Centre and Church Corner shops	35,290
Eastgate Shopping Centre and Linwood shops	27,137
New Brighton Mall	25,870

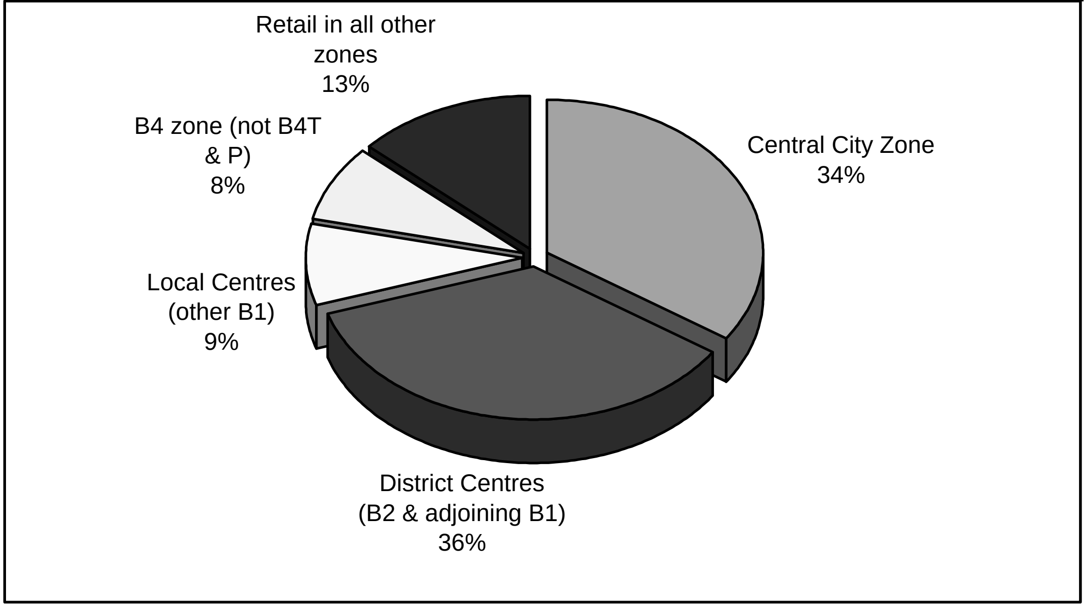
Source: Retail Floorspace Study 2000

- Stand-alone local centres throughout the city (eg Bealey Ave/Papanui Rd corner shops) together comprise 8.6 per cent of the total retail floorspace (Figure 1).

- The suburban industrial zone (B4 only) has a similar proportion of retail to local centres, comprising 7.8 per cent of the city's total floorspace (Figure 1).

[1] By comparison Auckland City had 2.36 sqm per person, Manukau had 1.56 and Waitakere and North Shore had 1.30 and 0.97 respectively (*source: Retail Consulting Group, 2000*).

Figure 1. Distrbution of Retailing by Zone in Christchurch City



Source: Retail Floorspace Study 2000

A number of proposed new developments will see the amount of retail floorspace in the city increase further in the next few years. Most development is intended for the existing suburban centres (B2) and the suburban industrial (B4) zone (Table 3).

Table 3. Projected Retail Floorspace in Christchurch City, 2000

City Plan Zone	Proposed Increase[2]	Retail Floorspace (sqm)	Floorspace %
Central City Zone (CC)		329,278	30.2
District Centres (B2 with adjoining B1)	37,760	382,396	35.0
Local Centres (other B1)		82,521	7.6
Suburban Industrial zone (B4 only - not B4T & P)	78,825	169,043	15.5
Retail in all other zones		128,776	11.8
Christchurch City	**116,585**	**1,092,014**	100.0

Some of the proposed developments are in existing malls: Hornby, Eastgate (Linwood), Northlands, Westfield ShoppingTown (Riccarton) and The Palms (Shirley). If all these developments go ahead, there will be nearly 40,000 sqm of additional retail floorspace in suburban centres (B2 zone). As such, the suburban centres will maintain their existing share of retail floorspace (35%) in the city.

The majority of other proposed retail developments is in suburban industrial (B4) zones. The proportion of retail floorspace in this zone is projected to increase substantially in the near future with resource consents granted or lodged for nearly 80,000 sqm. This will increase the share of retailing in B4 by 7.7% to 15.5% of total retail floorspace in Christchurch. As a result, the proportions of retail in other zones will decline – Central City down 4.4% to 30.2%, local centres (B1) down 1% to 7.6%.

If all resource consents were granted and built within the next five years, there would be a ratio of 3.2 sqm of retail floorspace per person in Christchurch by 2006[3]. This is an increase of 0.3 sqm per person from the current ratio.

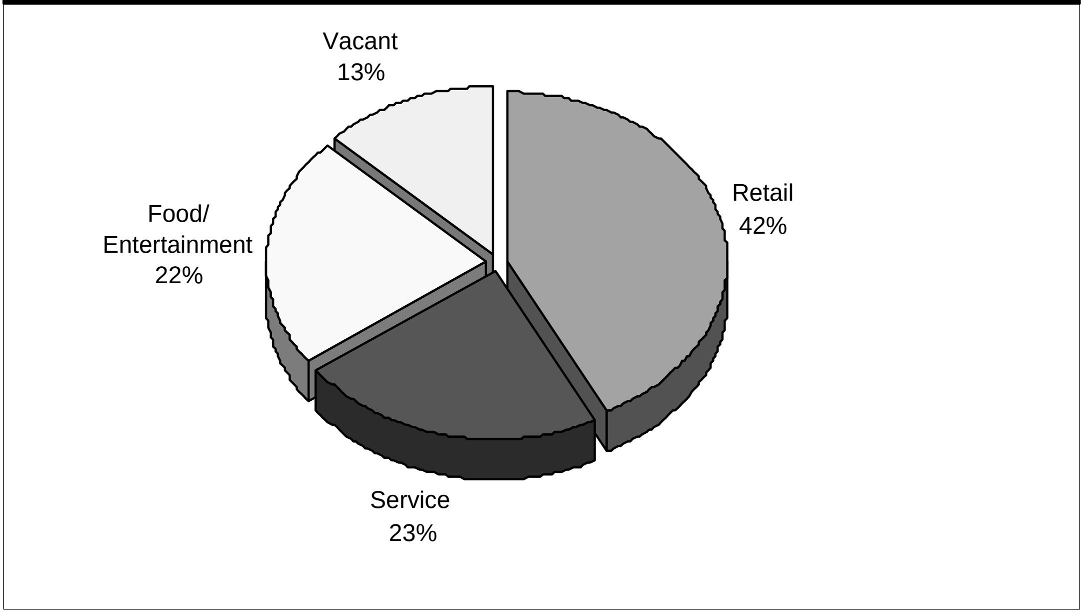
CENTRAL CITY GROUND FLOOR LAND USE SURVEY 2001

The survey of Ground Floor Land Use is conducted annually and collects information on the type and amount of building frontage within the Central City Zone.

[2] All developments included in this analysis have resource consents either currently lodged or already granted. Retail developments proposed for zones other than B2 and B4 have not been examined in this analysis. Most are small-scale developments.
[3] This assumes a medium population projection of 339,000 in 2006 (based on current Statistics New Zealand population projections).

The 2001 survey results revealed that the Central City Zone contains approximately 30 kilometres of building frontage. Of the 17.4 kilometres of shop frontage, *retailing* accounted for nearly half, with 42.4 per cent (Figure 2). *Service* and *food/entertainment* accounted for 22.7 per cent and 22.1 per cent respectively. Nearly 13 per cent of shop frontage was identified as *vacant*. These figures are very similar to last year's survey, indicating that although there is some change in business demography (business births, deaths and moves), the overall proportions of shop frontage have remained stable within the central city.

Figure 2. Shop Frontage in the Central City Zone by Land Use



Source: Ground Floor Land Use Survey 2001

Chairman's Recommendation: That the information be received.