

# Host Communities: siting and effects of facilities

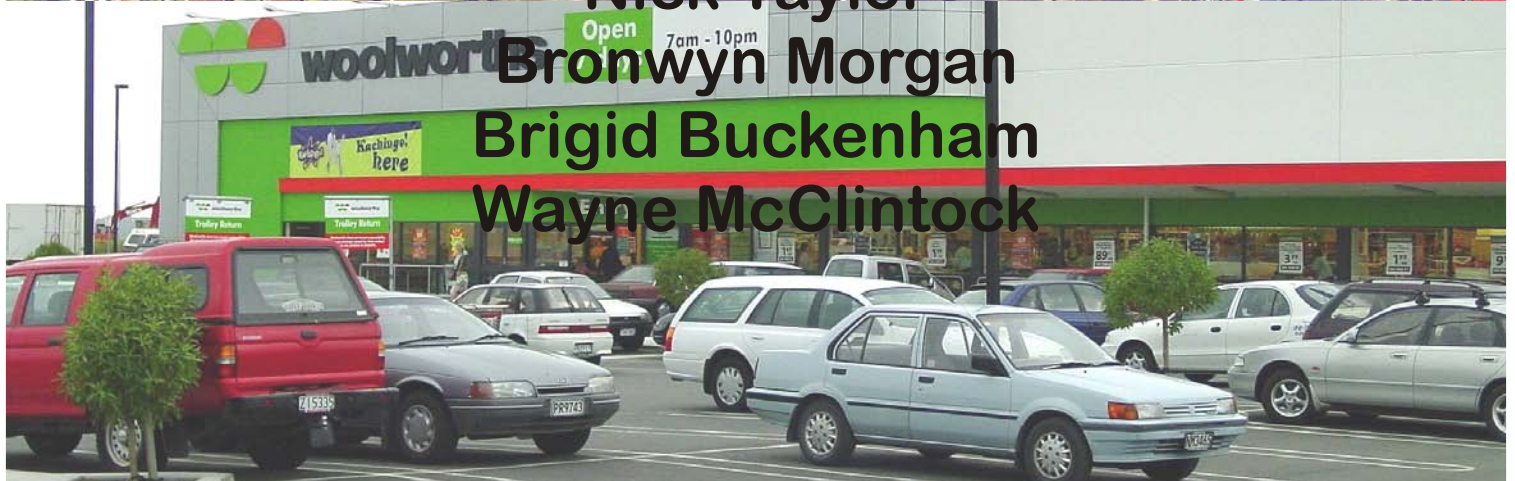


## Retail Facilities in New Zealand - A Comparative Analysis of Functional and Social Roles



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# 1 Introduction

## 1.1 Facility siting and effects research programme

This report contributes to social research being undertaken by Taylor Baines & Associates on the siting and effects of various types of facility on their host communities. This facility research has been contracted by the Foundation for Research Science and Technology, and is being funded out of the Public Good Science Fund.

The need for research into effects of facilities is highlighted by the varied but often negative responses from host communities to their siting. Examining siting issues and identifying the social impacts experienced by host communities will provide empirical information that is presently in short supply in New Zealand. This information can be used to:

- improve the assessments of effects, by providing a more comprehensive framework for analysis as well as contemporary assessment of actual host community experience;
- encourage better-informed community participation in the siting process;
- support better-informed planning decisions;
- encourage the development of effective relationships between facility operators and host communities; and
- improve ongoing management of facilities.

This information will in turn further develop the effects-based approach to resource management and planning embodied in the Resource Management Act 1991.

Previous work in this research programme focused on waste management facilities (such as landfills, transfer stations and waste water treatment plants), and prison facilities. The waste management facilities typically involved relatively few people permanently on site. Indeed, some waste water treatment plants are automated to the point where no personnel are present on site for significant periods of time.

The focus on prisons introduced a new dimension to the research by virtue of the fact that prisons are occupied by relatively large numbers of people (inmates and staff). People are an integral part of the facility; their presence and activities are closely linked to most of the effects that may be experienced off site by members of the host community. Thus, research on the off-site effects of prisons and the social impacts which prisons have on their host communities is, in practical terms, an assessment of the relationship between prisons and their host communities. Far more so than in the case of waste management facilities, this is a two-way relationship.

It is evident that the research on retail facilities adds further complexities, since retail facilities deliberately provide services to people at various levels of catchment. Research on their host communities seeks to examine the mix of desirable services from a local perspective, and any undesirable effects experienced locally.

## 1.2 Retail facility research

This report covers the second stage of a three-stage research programme which assesses the social impacts of New Zealand retail facilities on their host communities. This research is intended to assist host communities, territorial authorities, retail developers, and other professionals involved in the siting or re-development of large retail facilities in the future, as well as the management of these retail facilities.

The three stages involved in this retail facility research are:

### **Stage 1:     *Sector Review***

Discusses the forms, roles and functions of retail development;  
Discusses retail and shopping trends in New Zealand;  
Summarises the retail institutional setting (policies, plans, and trends);  
Reviews relevant national and international social impact literature.

### **Stage 2:     *Comparative Analysis***

Examines the nature of large retail facilities and retail sector development trends by describing a sample of retail facilities selected to contrast different scales/types of suburban centre and different stages in the cyclical pattern of retail centre development;  
Examines the functional and social roles of suburban centres;  
Discusses the development of amenity values in different scales and types of suburban centre.

### **Stage 3:     *Case Studies***

Examines the relationship between selected retail facilities and their host communities, and the actual experiences of social effects associated with the siting, presence and operation of these retail facilities.

## 1.3 Retail comparative analysis

The purpose of this report is to highlight the nature of large retail facilities (their functions and relationships) and to examine retail development over time, to provide a background for the case studies that will follow, and to assist with the development and planning of these case studies. This report should be read in conjunction with the Sector Review (McClintock et al., 2001) for a fuller exposition of the links between consumption behaviour and the creation of social amenity.

Explicit in this analysis is the notion that a large retail facility has the potential to generate additional functional amenity and also to underpin the development of social amenity around locations of retailing activity. This is because it often acts as a nucleus for further retail, commercial and community facilities and activities nearby. However, it must be remembered that the responsibilities for various aspects of such infrastructure and amenity development fall to different agencies. Local territorial authorities have long been responsible for land-use planning that has given rise to the

practice of land-use zoning, which often sees retail, commercial and community activities (all non-residential) clustered together. While it is private sector investors and developers who are generally responsible for retail and commercial infrastructure development, it is generally public and voluntary sector agencies who are responsible for the development of social, community or service delivery infrastructure. Such distinctions are not clear cut<sup>1</sup>. However, they serve to illustrate that a diversity of amenity values may be created over time in any location where significant retailing activity takes place, but that this is not necessarily the result of a coordinated or planned process.

This report contains a description of the research methodology in Section 2, a description and analysis of the composition and multi-amenity attributes of suburban centres in Section 3, a description of retail sector development trends in Section 4, and a discussion of the results of the research in Section 5.

## 1.4 Terminology and concepts utilised in this research

In this research on retail facilities and retail development, a number of terms are used with particular meaning.

### ***Effects and impacts***

The terms “social effects” or “social impacts” are interchangeable in the international impact assessment literature, although the term “effect” is generally used in New Zealand. As used and explored in Taylor Baines’ facility siting research, effects are not intended to refer only to negative effects. Rather, the authors use the concept in an unbiased way, acknowledging that both positive and negative effects on host communities may result from a facility siting and operations. This approach is consistent with the definition of ‘effect’<sup>2</sup> in the Resource Management Act 1991.

### ***Facilities and centres***

For the purposes of this research, which has a primary focus on particular retail facilities, the “main retail facility” refers to several categories of individual retail development including malls, freestanding supermarkets and other freestanding stores. Sometimes the use of the word “centre” in the facility

<sup>1</sup> There are several reasons for saying this. For example, some traditionally public sector responsibilities such as the provision of health and education services have become increasingly open to private sector provision (e.g. private child care facilities, private medical centres, etc.). Central and regional offices of government departments increasingly rent privately-developed office premises rather than building their own (e.g. Housing NZ, Work and Income NZ). Also, there are some ‘retailing’ activities such as restaurants and cafes which can have a social amenity value and which have become more prevalent in recent years.

<sup>2</sup> Resource Management Act 1991:  
3. Meaning of “effect”- In this Act, unless the context otherwise requires, the term “effect”... includes-  
(a) Any positive or adverse effect; and  
(b) Any temporary or permanent effect; and  
(c) Any past, present, or future effect; and  
(d) Any cumulative effect which arises over time or in combination with other effects- regardless of the scale, intensity, duration, or frequency of the effect, and also includes-  
(e) Any effect of high probability; and  
(f) Any potential effect of low probability which has a high potential impact.

name refers to a specific building as distinct from a whole shopping centre. Indeed, the term “centre” is often used in a marketing sense, even though other buildings housing retail activities are adjacent or close by.

In this research on retail facilities, the term “*centre*” refers to a collection or spatial concentration of commercial facilities and community facilities which may occur at various scales - regional centre, district centre, neighbourhood centre, and local centre. The so-called “*shopping centre*” is therefore a sub-set of these commercial and community facilities. In a contemporary world, the essence of a “*centre*” would incorporate ‘the distribution of public-orientated activities in or around a commercial nucleus. It would probably take walking distance into account.’ (Tansley, 2003a). In larger centres, a main retail facility can act as a nucleus for further development of both commercial and community facilities nearby. There is an implicit geographical boundary about each centre which can often correlate with the spatially explicit zoning provisions in district plans. However, as observed later (see Section 3.2), there is an increasing tendency for non-commercial facilities to locate outside the specified zones of smaller centres.

### ***Hierarchy of centres***

When considering an hierarchy of centres, it is helpful to remember that while they may use similar descriptors (e.g. regional, district), the shopping centre hierarchy based on retail function is not the same as the territorial hierarchy based on administrative areas. The hierarchy used in the analysis reported here is the shopping centre hierarchy.

Different levels of shopping centre have been described in various analyses of retail development patterns (for example, in Hames Sharley, 2001). As Tansley points out (2003b) such definitions should be based ‘on functional grounds’. Any hierarchy, incorporating local, neighbourhood, suburban, district, sub-regional and regional centres, although sounding discrete in nature, in practical terms represents a continuum across which commercial, community and administrative functions differ.

Reflecting this proposition, Tansley suggests the following -

A ‘*regional centre*’ refers to the Central Business District of the major metropolitan or urban area of a region. Thus Auckland, Hamilton, Wellington, Christchurch and Dunedin CBDs represent regional centres, while the main centres in the outer cities (e.g. Manukau City, North Shore City, Lower Hutt City, Ashburton, Timaru, etc.) generally represent ‘*sub-regional centres*’ in a functional sense.

A ‘*sub-regional centre*’ serves a totally urban or mixed urban/rural community that is more conveniently served locally in terms of its administration, social and community needs i.e. consumers come from such a wide area that encompasses residents of several local authorities.

A ‘*district centre*’ generally serves the needs of residents in a group of suburbs within a single urban area, and where near the urban fringe may also serve an adjacent rural hinterland.

A '*suburban centre*' normally serves up to two or three suburbs in localities not conveniently served by a district centre.

A '*neighbourhood centre*' generally has a catchment area that is limited to or within a suburb. Retail facilities in a neighbourhood centre mainly provide for convenience goods that serve the day-to-day needs of the surrounding neighbourhood, but may include a limited range of more frequently required comparison goods.

A '*local centre*' is a small group of stores that serve a convenience function, distinct from that of larger retail centres, to a very local catchment area - nearby streets. These centres are relatively insignificant in terms of overall retail expenditure.

The term '*town centre*' is more colloquial in nature and is not part of this retail functional hierarchy. For example, in a Canterbury context, Ashburton and Timaru town centres both fulfil sub-regional functions, whereas Leeston's town centre would be more akin to a neighbourhood centre or suburban centre, partly serving a rural community (Tansley, 2003b).

As noted above, the functional hierarchy is in fact a continuum. It is therefore sometimes difficult to apply a particular label definitively. For example, in the Christchurch context, Riccarton and Papanui could be towards the top end of large district centres, or the presence of distributed central government agency offices could make it appropriate to designate them as sub-regional centres. Tansley suggests that the two terms '*sub-regional*' and '*district*' can apply in both intensively settled (i.e. totally urban) settings or in mixed settings (i.e. township plus rural hinterland). Further down the hierarchy, the concept of '*neighbourhood centre*' probably has no non-urban equivalent, and there are some small rural towns which can fairly be described as having '*local centres*'.

Tansley observes that 'as one moves up the hierarchy, centres - at least those that have developed "organically" - become less easy to define by some arbitrary geographical means. Even zoning is not a consistent parameter. Sometimes, centres have overflowed; in other cases, the zoning is presumptive of foreseen expansion potential. Centres with an industrial zone interface have invariably 'leached' in some respects into such a zone. The largest examples of regional and sub-regional centre invariably have core and fringe zones, which begs the question of how far into the fringe does the 'centre' extend.

### ***Hierarchy and retail function***

Several phrases are typically used in retail analysis to describe different aspects of functional amenity. At the higher end of the hierarchy, shopping centres provide 'comparison shopping' and 'higher order goods', while at the lower end of the hierarchy, shopping centres provide for the day-to-day 'convenience shopping' requirements of the community.

'*Comparison shopping*' describes the shopping activity whereby several general merchandise stores are visited as a prelude to purchase, in order that price, quality, style and other qualities about the sought goods may be compared. Some comparison shopping occurs within the larger stores, due to the choice of merchandise on offer. This shopping activity often includes or extends to the purchase of meals or snacks and is increasingly associated with other leisure pursuits.

*‘Higher order goods’* are goods that are usually the subject of comparison shopping; purchased relatively infrequently and tending toward a higher unit value per good than convenience shopping products or goods.

*‘Convenience shopping’* describes shopping where product accessibility and minimising the time devoted to purchasing are the key shopper desires. The concept tends to focus on goods regularly purchased such as groceries, toiletries, magazines and videos for hire and extends to services regularly used, such as banks and hairdressers (Tansley, 2003b).

### ***Community facilities***

*“Community facilities”* refer to various categories of non-commercial activity which provide for a range of community functions or community-based services - schools and pre-school facilities; premises of voluntary organisations, churches and associated facilities; community centres, halls, meeting rooms, plunket rooms, etc; retirement/aged care complexes and institutional residential facilities for certain groups, recreation facilities such as pools, parks, playgrounds, libraries, etc; local government service centres; premises for de-centralised central government agency offices (eg: WINZ, Housing NZ, CYF, ACC, etc); police stations or community constable offices.

When discussing the composition of a centre with its combination of commercial facilities and community facilities, two points should be remembered. Firstly, *“commercial facilities”* is a more encompassing term than retail activities; it will include retailing activities and services as well as many offices, health facilities, motels and accommodation. Secondly, certain types of commercial activity embody more direct contributions to community focus than others - for example, the contributions from restaurants and café/bars (normally described as retail activities), and places of entertainment, as well as banks (normally described as retail services) and a range of health facilities (not normally described as retail services).

### ***Host community***

The *“host community”* refers to the residential area most likely to experience the direct off-site effects and impacts of retailing activity arising from commercial facilities, such as noise, litter, parking congestion, and so on. In practical terms for large shopping centres, and particularly for those which include major retail facilities, this is likely to incorporate a maximum of 2-3 blocks around the shopping centre. Therefore, as used here, the host community is likely to encompass a smaller area than the primary retail catchment.

## **1.5 The research provider - Taylor Baines & Associates**

Taylor Baines & Associates has been a private provider of research, consulting and training services since 1989. The firm specialises in social research and the application of social assessment methods to a wide variety of issues in community development. For more information on the services and work carried out by Taylor Baines & Associates refer to [www.tba.co.nz](http://www.tba.co.nz).

## 2 Approach and Methodology

### 2.1 Approach to this analysis

In order to explore the nature of large retail facilities, their roles, functions and host community relationships, and the patterns of development in New Zealand's shopping centres, a short scoping exercise was carried out, with the collaboration of a specialist retail consultant<sup>3</sup>, who was familiar with retail developments nationwide. The purpose of the scoping exercise was to provide a selection of major facilities from which a sample could be made for detailed analysis, as reported in this Working Paper.

Initial criteria for selection were three-fold. Firstly, some geographical spread was necessary to underpin the wider applicability of this research. Allied to the previous experience of members of the research team on several retail cases under the RMA, which would assist in adding knowledge to the analysis, three metropolitan areas were included - Christchurch City, Auckland City and North Shore City. Secondly, a variety of types of large retail facility was necessary encompassing malls, bulk retail outlets and large stand-alone supermarkets. Thirdly, to gain an understanding of the development dynamics of shopping centres, it was necessary to include in the sample some greenfields or 'out-of-centre' retail developments along with the long-established shopping centres.

This scoping exercise resulted in the identification of 25 large retail facilities in the three metropolitan areas. They are listed in Table 1. From this selection, a sample of 12 facilities was chosen for more detailed analysis<sup>4</sup>. This selection encompassed dominant malls, bulk retail outlets and large stand-alone supermarkets. Base data from Tansley's surveys is presented in Appendix I.

Finally, to enable the sample of large facilities (and their associated centres) to be considered in the broader context of patterns of shopping centre development, discussions were held with the City Planning Unit of Christchurch City Council to identify some smaller centres for analysis and comparison. The full set of facilities and related shopping centres for which investigations were carried out is shown in Tables 2 and 3.

<sup>3</sup> Mark Tansley & Associates of MarketPlace New Zealand Ltd.

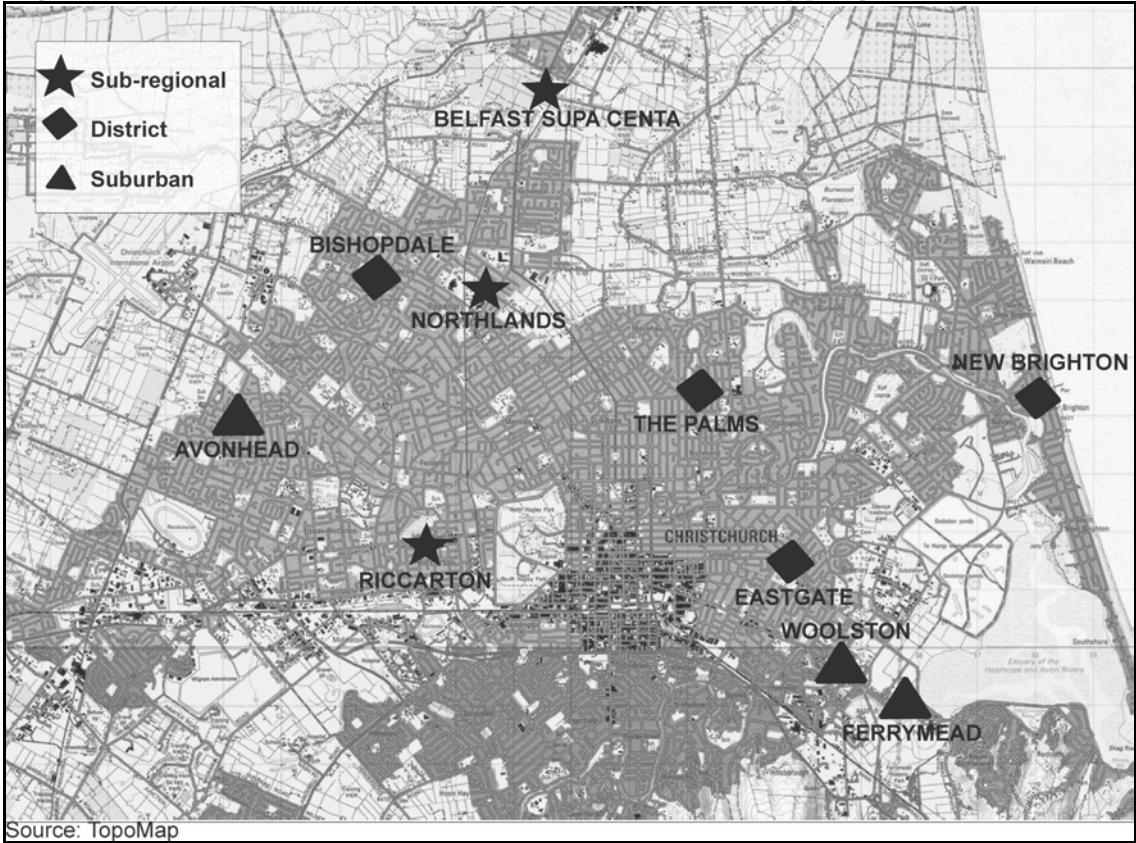
<sup>4</sup> The overall research involved various types of analysis (refer to Section 2.2) to address different research questions. Not all the facilities in this sample were involved in ALL aspects of analysis.

**Table 1: Selected large retail facilities**

Type of large retail facility	Metropolitan area	Facility name
Dominant mall	North Shore City	Glenfield Mall Milford Mall Highpoint Mall, Birkenhead
	Auckland City	St Lukes Dres\$mart Mall, Onehunga
	Christchurch City	Riccarton Mall Northlands Mall, Papanui The Palms, Shirley Eastgate Mall, Linwood Bush Inn Mall, Upper Riccarton
Non-dominant mall	North Shore City	Shore City Galleria
	Auckland City	277 Centre
	Christchurch City	Dres\$mart/Hornby Mall
Bulk retail outlet	North Shore City	Albany Mega Centre Link Drive, Wairau Valley
	Auckland City	Harvey Norman Centre, Panmure
	Christchurch City	Belfast Supa Centa Moorhouse Avenue
Large supermarket	North Shore City	Albany Pak’N Save Foodtown, Barrys Point
	Auckland City	Owairaka Pak’N Save New World, College Hill Foodtown, Green Lane
	Christchurch City	Moorhouse Pak’N Save Woolworths, Ferryroad

The Christchurch centres selected for further study are mapped in Figure 1 and listed in Table 2.

**Figure 1:    Location of selected Christchurch shopping centres**



**Table 2: Characteristics of selected Christchurch retail facilities<sup>5</sup> and shopping centres**

Facility name	Shopping centre	Type of shopping centre within retail hierarchy	Type of facility	Main facility first opened	Retail outlets	
					<u>within main retail facility</u>	<u>within the shopping centre<sup>6</sup></u>
Northlands Mall	Papanui	sub-regional (growing)	Enclosed mall	1967	70	131
Westfield Shoppingtown	Riccarton	sub-regional (growing)	Enclosed mall	1965	82	142
Eastgate Mall	Linwood	district (growing)	Enclosed mall & freestanding The Warehouse	1986	35	40
The Palms	Shirley	district (growing)	Enclosed mall	1996 <sup>7</sup>	62	21
(No single dominant retail facility)	New Brighton	district (declining)	Open mall	N/A	N/A	133
(No single dominant retail facility)	Bishopdale	district <sup>8</sup> (declining)	Open mall	N/A	N/A	57
Avonhead Mall	Avonhead	suburban (static)	Enclosed mall	1993	18	3
(No single dominant retail facility)	Woolston	suburban <sup>8</sup> (declining)	Strip shopping	N/A	N/A	44
Woolworths	Ferrymead	suburban (growing)	Stand alone supermarket	2000	1	66
Belfast Supa Centa	Sth Belfast	sub-regional (growing)	Bulk retail centre	2001	3	2

This sample of main retail facilities and centres around Christchurch City includes four dominant malls, all of the enclosed variety (2 sub-regional, 2 district), one neighbourhood mall (enclosed), three mid-range shopping centres (district/suburban/neighbourhood) based around open malls or strip shops, and two recent, major ‘out of centre’ retail developments.

<sup>5</sup> Numbers of retail outlets in main facilities and in related suburban centres can change at any time. The field work for this research was carried out in the period February to April 2002 and care has been taken to report accurately the numbers in existence at that time.

<sup>6</sup> But not including retail outlets within the main retail facility.

<sup>7</sup> Prior to the opening of The Palms, Shirley was a district centre of some twenty years’ standing, featuring a supermarket, department store and a range of retailers and other activities in - essentially - two main complexes. Prior to that, it was a neighbourhood centre. The Palms’ developers demolished or over-built what was there, to create the 1996 complex, since expanded (Tansley, 2003b).

<sup>8</sup> Tansley’s retail analysis (Tansley, 2003b) suggests that the Bishopdale centre may now even have the function of a suburban centre whereas twenty years ago it was similar in function to Papanui, which has since progressed to function as a sub-regional centre. Similarly, Woolston may now even have declined in function to that of a neighbourhood centre.

The difference in scale between sub-regional, district and neighbourhood centres is evident from Table 2, by summing the numbers of retail outlets for each centre. However, the overall numbers of retail outlets have to be interpreted with care, along with the history of any centre. For example:

- New Brighton is a long-established centre (the first in the city to open its doors for weekend shopping) but has never had an enclosed mall and has struggled to compete for more than a decade with the newer, larger sub-regional or district centres so that it is now debatable whether it serves a district or a suburban function, even though there remain a relatively high number of retail outlets;
- Avonhead and Woolston exemplify the new and the old style of neighbourhood or suburban centre - the new (Avonhead) with an enclosed mall and virtually no strip shops and the old (Woolston) based around traditional strip shopping with no single dominant retail facility;
- Ferrymead has seen the accumulation of retail activity over the past decade on land zoned Business 4 (suburban industrial), but without a main retail facility until the new supermarket was opened in 2000, resulting in an acceleration of the growth of retail outlet numbers;
- South Belfast (Northwood) is newly converted to Business 4 zoning, and was initiated in late 2001 with several stores of a scale that could ultimately serve a sub-regional function on the northern fringe of Christchurch.

In summary, some centres are growing, some are in decline, and some are experiencing a shift of retail activity into the main retail facility, with other commercial or retail activity taking its place in the adjacent shopping centre. Shopping centres are dynamic within themselves and between each other, while some grow at the expense of others.

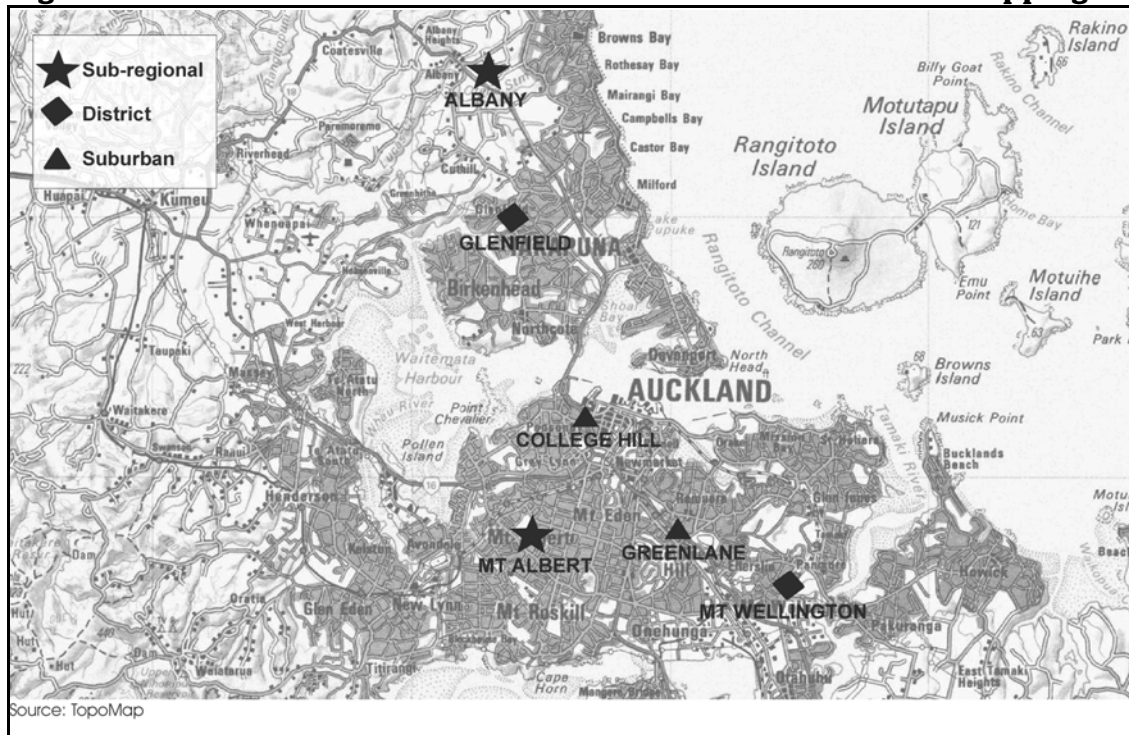
Finally, this is not to say that amenity value (both functional and social amenity) is dependent simply on the scale of retailing activity. The diversity of retail activities and the extent to which community and social services actually evolve in a centre - either from the opportunities created by retail and commercial concentration, or as a result of land-use planning initiatives in district plans - are likely to be important factors as well. Another factor might be the spatial decentralisation of government's administrative and service functions (e.g. central government agencies such as Housing NZ, Work and Income NZ; local government services such as service centres and libraries - see Table 3). Nevertheless, the scale of retail activity may be taken as one indicator of the numbers of people who visit a centre to satisfy their consumption needs. Assessing the extent to which their other social and community needs are met will require other indicators and other research.

**Table 3: Locations of decentralised government services corresponding to the Christchurch sample of shopping centres**

Facility name	Shopping centre	Type of shopping centre within retail hierarchy	Existence of government services				
			Housing NZ	WINZ <sup>9</sup>	CYF <sup>10</sup>	CCC service centre	CCC library
Northlands Mall	Papanui	sub-regional	✓	✓	✓	✓	✓
Westfield Shoppingtown	Riccarton	sub-regional	✓	✓		✓	✓
Eastgate Mall	Linwood	district	✓	✓		✓	✓
The Palms	Shirley	district		✓		✓	✓
(No single dominant retail facility)	New Brighton	district		✓			✓
(No single dominant retail facility)	Bishopdale	district					✓
Avonhead Mall	Avonhead	suburban					
(No single dominant retail facility)	Woolston	suburban					
Woolworths	Out of centre, Ferrymead	suburban					
Belfast Supa Centa	Out of centre, Sth Belfast	sub-regional					

The Auckland and North Shore shopping centres selected for further study are mapped in Figure 2 and listed in Table 4.

<sup>9</sup> Work and Income NZ service centre  
<sup>10</sup> Child Youth and Family office

**Figure 2: Location of selected Auckland and North Shore shopping centres****Table 4: Characteristics of selected Auckland and North Shore retail facilities**

Facility name	Shopping centre	Type of shopping centre within retail hierarchy	Type of facility	Main facility first opened	Retail outlets	
					within main retail facility	within the shopping centre <sup>11</sup>
St Lukes	Mt Albert	sub-regional	Stand alone enclosed mall	1971	114	0
Harvey Norman Centre	Mt Wellington	district	Bulk retail centre	2001	12	9
New World Supermarket	College Hill	suburban	Stand alone supermarket	1999	4	0
Foodtown Supermarket	Greenlane	suburban	Stand alone supermarket	1982	5	0
Glenfield Mall	Glenfield	district	Enclosed mall	1971	117	34
Mega Centre	Albany	sub-regional	Bulk retail centre	1997	28	32

11

But not including retail outlets within the main retail facility.

## 2.2 Research methods

A number of different research methods were employed to address various aspects of the research. These include:

### *Direct description*

- of commercial and community facilities in 10 Christchurch shopping centres (Papanui, Riccarton, Linwood, Shirley, New Brighton, Bishopdale, Avonhead, Woolston, Ferrymead, and the Belfast Supa Centa); and six Auckland shopping centres (St Lukes, Harvey Norman Centre-Mt Wellington, New World Supermarket-College Hill, Foodtown Supermarket-Greenlane, Glenfield Mall, and the Albany Mega Centre). This observation procedure applied a categorisation of retail and non-retail services and facilities (see Appendix II), and resulted in the production of maps<sup>12</sup> and table counts.

### *Structured surveys*

- with representatives (people in senior or managerial/administrative positions, or personnel familiar with the organisation's clients) from 44 commercial and community facilities within three Christchurch shopping centres (Riccarton, Papanui, and Shirley). A structured questionnaire was used with both open and closed questions, which explored the advantages and disadvantages of present locations in or near shopping centres, and the incidence of particular linkages with other community facilities and businesses nearby. The results indicate the importance of co-location in achieving multi-amenity value in shopping centres.

### *Semi-structured or unstructured key informant interviews*

- with five facility managers in Christchurch (Shirley, Linwood, Riccarton) and Auckland (Glenfield Mall, New World Supermarket-College Hill);
- with representatives of the Christchurch City Council Planning Department regarding urban commercial development strategy;
- with an Environment Canterbury representative regarding Christchurch's public transport network, and its relationship with the hierarchy of shopping centres;

### *Secondary data analysis*

- a retail survey commissioned by the Christchurch City Council in 1991
- specialist retail analysis provided by Mark Tansley & Associates.

### *Access to participants*

Taylor Baines' researchers accessed representatives of commercial and community facilities in three Christchurch shopping centres (Riccarton, Papanui, Shirley) by telephone or door to door calling. While the majority of structured questionnaires were filled out by the researchers, due to the nature of the facilities' and consequential time constraints, several representatives were left questionnaires to fill out in their own time. Facility managers were accessed by telephone or in face-to-face interviews.

<sup>12</sup>

Maps were prepared for the ten Christchurch suburban centres only, using the GIS system of the Christchurch City Council.

### **2.3 Time frame**

The direct observation of commercial and community facilities within shopping centres in Christchurch and Auckland took place in December 2001 and mid-February to mid-April 2002.

Structured surveys with representatives of commercial and community facilities in Christchurch shopping centres were carried out in April 2002.

Semi-structured interviews with mall managers were conducted in January 2001 and February 2002.

### 3 Composition and multi-amenity attributes of shopping centres

#### 3.1 Function and scale in retail activity

The hierarchy of centres presented in Section 1.4 differentiates centres of various size with different retail functions and with customer catchments of varying geographical extent. Supermarkets provide basic grocery and food shopping in shopping centres. Because these are essential and frequent shopping needs, and because larger supermarkets therefore attract substantial numbers of customers on a regular basis, it is not uncommon that other retail outlets choose - if the land-use planning regime permits - to locate in close proximity to supermarkets in order to tap into the customer stream. The number of retail outlets in any location may therefore grow over time. Such agglomeration of retailing activity around nodes of frequent customer activity is a familiar phenomenon.

In larger shopping centres, supermarkets are often found incorporated within malls. They commonly perform the role of 'anchor store'<sup>13</sup>, which carries the same connotation described above.

This research programme examines aspects of the relationship between major retail facilities and the residents and businesses who live and operate nearby in the host community. As was noted in the Sector Review (McClintock et al., 2001, p.31), carried out as Stage 1 of this research programme, "It appears that the development of retail infrastructure in New Zealand has followed similar trends to those observed internationally. While the mix of functional and social roles is well established in the commentary to be found in international literature on retail development, this mix of roles is only gradually being acknowledged within the formal (legal) planning processes in New Zealand." Even though the host community is only a small part of the customer catchment for any large retail facility, for the purposes of examining the relationship with its host community, it is important to recognise and acknowledge the positive amenity functions - both retail and social amenities - from which host community members also benefit. A balanced view of the experience which nearby residents and businesses have of being in proximity to a large retail facility comprises both the on-site amenity effects as well as the potential off-site environmental effects<sup>14</sup>.

The scale of retail activity in any location increases as a result of the agglomerating or nucleating effect of certain types of retailing, particularly supermarkets which provide for essential and frequent needs. Within the limited scope of this analysis<sup>15</sup>, this stage of the research programme aimed to identify whether or not there is New Zealand empirical evidence to underpin the concept of overlapping functional and social roles in retail development. Thus increasing scale is not so much of interest in itself. The analysis investigates whether increasing scale is also associated with increasing diversity of retail composition in shopping centres. Through increasing diversity of

<sup>13</sup> It should be noted that other stores can also perform this function within shopping centres. This may be by virtue of their established reputation, high profile or marketing capacity, as in the case of prominent department stores. Alternatively it may be by virtue of the fact that they provide for what are seen to be frequent or essential needs (e.g. banks, pharmacies).

<sup>14</sup> Potential off-site effects such as noise, traffic congestion, light-spill, parking overflow, litter, etc. as described in McClintock et al. (2001, pp24-30).

<sup>15</sup> Limited by the level of funding allocated to this research task. As with Stage 1 of the research programme, Stage 2 was conceived as preparatory to carrying out the case studies in Stage 3, which are the primary focus of the research objective.

retailing activity, and particularly through the presence of certain types of retailing activity, shopping centres have the potential to provide increasing functional amenity. Through the agglomerating or nucleating process described above, centres also have the potential to add to this functional amenity by providing opportunities for social and community services (e.g. council service centres and libraries, primary medical services). The diversity of the functional amenity adds to the potential social amenity provided. Social amenity values include a sense of community identity<sup>16</sup>, a focus for service delivery to local residents, and a focus for social and recreational activities (e.g. cafés, bars and restaurants, social service clubs).

The analysis reported here is of two kinds. Firstly, we have compiled and analysed observational data on the composition of shopping centres, which is reported in Section 3.2. Secondly we investigated the benefits of co-location through a survey of those involved in commercial and community activities in the vicinity of three shopping centres in Christchurch (reported in Section 3.3).

Nearby residents' experience of amenity values will be investigated in more detail in the case studies which comprise Stage 3 of this research programme on large retail facilities.

### **3.2 Scale, composition and diversity - the multiple amenity of shopping centres**

#### *Categories of retail activity*

The retail composition of sixteen shopping centres in the three cities of North Shore, Auckland and Christchurch has been analysed and compared. In order to do this, eight categories of retail activity were distinguished, as follows (full details are provided in Appendix II) -

- Anchor stores
- Retail goods
- General retail services
- Commercial and financial services
- Health-related services
- Eating and drinking venues
- Entertainment and recreation venues
- Commercial accommodation

After direct field observations, maps and table counts of retail activity were prepared for each of the sixteen shopping centres. It should be remembered that numbers and types of retail activity are constantly in flux. New openings and closures can result in changing numbers as well as changing composition of retail outlets in any shopping centre. Some shopping centres are expanding, while others may be relatively static or in decline. The comparative analysis presented here is based on a snapshot of observations made between February and April 2002.

<sup>16</sup>

A facility such as St Lukes, which is almost on its own from a retail perspective, still provides community identity.

### *Scale and diversity*

The comparative analysis (Table 5) demonstrates, not surprisingly, that some diversity of retailing exists at all scales of shopping centre. However, it is apparent from the sample of centres analysed that the greatest diversity undoubtedly is associated with the larger centres - those having the larger numbers of retail outlets.

The sixteen shopping centres analysed in this comparative analysis distinguish themselves into three groups.

#### Larger and longer-established centres with malls

The eight centres in this group included large enclosed malls (6) and two open malls. In all but one case, the malls were associated with substantial numbers of strip shops in the adjacent streets. Generally they serve a sub-regional or large district catchment. With one exception, the malls had been in existence for more than fifteen years. The average number of retail outlets in this group was 142. This group included -

- Glenfield (including the Glenfield Mall)
- Mt Albert (including the St Lukes Mall)
- Papanui (including the Northlands Mall)
- Riccarton (including the Westfield Riccarton Mall)
- Linwood (including the Eastgate Mall)
- Shirley (including The Palms mall)
- New Brighton (open mall)
- Bishopdale (including the Bishopdale open mall)

#### Smaller centres and those formed around bulk retail stores and stand-alone supermarkets

The six centres in this group included two formed around bulk retailing centres, two formed around stand-alone supermarkets, an enclosed suburban mall, and a suburban centre with no mall or bulk retail facilities at all. While the bulk retail centres serve sub-regional or district catchments, the other shopping centres serve smaller district and suburban catchments. The two bulk retail centres were relatively recent developments (1997-2001), but all the other shopping centres had anchor stores which had been established for at least ten years and in most cases more than twenty years. The average number of retail outlets in this group was 43. This group included -

- Albany (including the Mega Centre bulk retail)
- Mt Wellington (including the Harvey Norman Centre bulk retail)
- College Hill (including the new World Supermarket)
- Greenlane (including the Foodtown Supermarket)
- Avonhead (including the Avonhead Mall)
- Woolston (only strip shops)

#### Recent 'out of centre' developments

Two recent 'out of centre' retail developments in Christchurch provide some contrast. The 'stand-alone' Woolworths Supermarket at Ferrymead was established in 2000 in a business zone which had seen light industrial, commercial and a mix of small retail outlets accumulating over the previous decade. The Canterbury Supa Centa was established in 2001 with three large anchor stores in a completely 'greenfields' location near substantial new residential areas north of Christchurch City.

The eight larger and long-established shopping centres (in terms of numbers of retail outlets) all contained activities in 6 to 8 of the categories identified above, while the six smaller and newer centres all contained activities in 5 to 6 categories. These data have been summarised graphically in Appendix III.

Comparative analysis between the eight larger and six smaller centres<sup>17</sup> reveals some consistent differences, which are evident in Table 5 below.

**Table 5: Comparison of scale, composition and diversity (2002)**

Attribute of comparison	Larger shopping centres	Smaller shopping centres
No. of retail categories present	6-8	5-6
Ave No. of anchor stores	4	2
Ave No. of separate retail outlets	142	43
Ave No. of general retail goods outlets	82	21
Ave No. of eating/drinking venues <sup>18</sup>	16	4
Ave No. of entertainment/recreation venues	1	0
Ave No. of medical/health-related practices	9	1

The results in Table 5 provide strong empirical evidence for the nucleating influence of shopping malls and supermarkets within shopping centres, and the role of anchor stores within this process.

The two 'out of centre' examples provide contrasting cases, which nevertheless are not inconsistent with the pattern described above. The new Woolworths Supermarket has become the main anchor store for the emerging shopping centre at Ferrymead on the eastern fringe of Christchurch. While there were already a substantial number of retail outlets present in Ferrymead before the Woolworths Supermarket opened in 2000, the rate of agglomeration of other retail activities in the vicinity of the site appears to have increased markedly since consents were granted (see Section 4.2). Of particular note, in the context of diversity and levels of functional amenity, is the fact that a major bank has re-located from nearby Woolston to Ferrymead, and ten restaurants/cafes are now located in the vicinity. As a result, Ferrymead already displays signs of becoming a suburban shopping centre. For South Belfast, in contrast, by the beginning of 2002, there were four bulk stores and a supermarket newly opened on land that had not long previously been in rural use. The scale and footprint of these retail outlets is such that they are expected in due course to service a sub-regional catchment, even though at the present time there is little retail diversity. New residential sub-divisions are being developed rapidly in the immediate vicinity of the retail outlets, but the retail centre cannot claim to provide any significant social amenity due to the absence of the necessary attributes. While it is possible, even likely, that a new shopping centre will evolve in due course, the existing retail activity represents the very earliest stage of the development cycle.

<sup>17</sup> The distinction between 'larger' and 'smaller' shopping centres is made on the basis of the number of separate retail outlets operating at one point in time. This does not imply that small shopping centres will not in future grow to become large shopping centres. The distinction is drawn between 'larger' and 'smaller' in order to investigate aspects of composition, diversity and amenity function at a given point in time; in this case, in the first quarter of 2002.

<sup>18</sup> This category does not include fast-food or take-away food outlets. It includes only venues where people can purchase food or drink and consume this on site.

*Multiple amenity: functional & social amenity*

The Retail Sector Review (McClintock et al., 2002) highlighted the social and functional roles of shopping centres. Shopping centres provide a space for the sale of goods and services, but in doing so they may also create the opportunities for community space or focal point which allows for socialising, recreation, and leisure. This combination of community focal point and 'consumption space' can be one means of constructing social identity within urban communities. Thus, while social amenity is implied by more diverse retail functions, the association is not automatic; social amenity still needs suitable places to express itself in community behaviours.

In terms of contributing to a community focus, certain commercial activities appear to have important roles. For example, banks facilitate other activities to the extent that people rely on cash transactions and some, particularly people in older age brackets, maintain a preference for face-to-face banking. Restaurants, bars and cafes, and places of entertainment such as cinemas or gymnasias provide places for people to spend time together, recreate and socialise. Ready access to a range of personal health or medical services is also important to people's sense of well-being. Even though these can all be described as retail activities, they provide an element of social amenity as well.

The possibility of inter-linked functional and social amenity or 'multiple amenity' of shopping centres is supported by the results presented in Table 5. While there is evidence of multiple amenity in both larger and smaller shopping centres, it is much more strongly in evidence in the larger shopping centres, as denoted by the greater diversity of places to socialise within the retail composition of the shopping centre. Larger centres also accommodate a greater range of medical and primary health-related services. It is worth noting, however, that in the case of medical and health-related services, more than 50% of them were physically located in the host community surrounding the shopping centre rather than embedded within the shopping centre itself. This is one manifestation of the physical process of nucleation, whereby retailing activity provides a spatial and functional framework for other activities to occur.

The analysis of scale and diversity in functional amenity was taken further for the ten shopping centres in Christchurch. The effects of nucleating behaviour on retail/commercial outlets and community facilities was explored in a similar fashion. Results are presented in Table 6.

**Table 6: Relative numbers of retail/commercial outlets and community facilities, Christchurch, 2002**

Location	# Retail/Commercial outlets			# Community facilities		
	within the shopping centre	in the neighbouring 'host community'	Total	within the shopping centre	in the neighbouring 'host community'	Total
<u>sub-regional:</u>						
Papanui	201	10	211	18	14	32
Riccarton	224	26	250	9	20	29
<u>district:</u>						
Linwood	75	6	81	5	10	15
Shirley	83	4	87	0	15	15
New Brighton	133	10	143	4	17	21
Bishopdale	57	5	62	4	16	20
<u>suburban:</u>						
Avonhead	21	3	24	0	5	5
Woolston	44	3	47	6	7	13
<u>Large, out of centre retail:</u>						
Ferrymead	67	0	67	1	2	3
Belfast Supa Centa	5	0	5	0	5	5

It is evident that larger centres tend to have associated with them more community facilities than smaller centres. Two of the centres that are currently in decline in terms of retail function (Bishopdale and New Brighton), still retain relatively high levels of community infrastructure<sup>19</sup>. The longer established and larger the scale of the shopping centre, the more diverse the community use of that centre. It is also apparent that in the sub-regional centres, the community facilities tend to be more interspersed with the commercial activities (i.e. 44% are within the shopping centre zone itself) in comparison with smaller district or suburban centres where community facilities are clustered nearby in the host community (i.e. only 21% are within the shopping centre zone itself). While this is at one level a reflection of the constraints of space, it also reflects a difference in the degree of inter-relatedness between functional amenities in that combined space. The two newest and rapidly growing centres in terms of their retail function (Ferrymead and South Belfast) have so far developed relatively low levels of community infrastructure. This suggests that such development tends to lag behind the purely commercial development. However, there are signs in the case of Ferrymead that social amenity is imminent (refer to Table 7).

Table 7 compares the relative incidence of retail activities which contribute additional functional amenity and social amenity for the ten shopping centres in Christchurch.

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Research has not been carried out to determine whether the level of use of the community infrastructure has declined in the same way as the level of retail activity has declined.

**Table 7: Relative numbers of commercial activities which contribute additional functional amenity and social amenity, Christchurch, 2002**

Location	Banks	Restaurants etc	Health/medical
<u>sub-regional:</u>			
Papanui	6	29	12
Riccarton	7	31	9
<u>district:</u>			
Linwood	1	8	9
Shirley	4	9	7
New Brighton	3	15	9
Bishopdale	1	7	4
<u>suburban:</u>			
Avonhead	1	3	3
Woolston	1	3	2
<u>Large, out of centre retail:</u>			
Ferrymead	1	10	3
Belfast Supa Centa	0	0	0

The data in Table 7 demonstrate that additional functional amenity is delivered in conjunction with retail activity at all the levels of shopping centre. Choice and diversity are greater at higher levels, with the sub-regional centres standing out as providing places to socialise.

It is also noteworthy that while most of the health and medical service facilities featured in this sample (32 out of 58) are located within the space of the shopping centres concerned, a significant proportion (the remaining 45%) have been located within nearby residential zones, reflecting both a perceived compatibility of such commercial activities with their residential environments, and arguably the sense of social amenity associated with them.

Thus, it appears that the nucleating effect of regular and frequent consumption activities associated with food and grocery shopping may apply both to functional and social amenity. Whether co-location increases multiple amenity value from the perspective of commercial and community organisations was further investigated and is reported in Section 3.3.

#### *Factors affecting amenity: public transport and parking*

There appear to be a number of factors which can affect the multiple amenity of shopping centres. For example, amenity can be reduced or enhanced by the level and quality of public transport options, and by the parking facilities offered.

Different community members access their chosen destinations in different ways. Most of the main retail facilities and larger shopping centres provide dedicated off-street parking which caters to those with private transport, although it is clear that there are times when the capacity of such parking facilities is insufficient to cater for volumes of private vehicles. Less mobile people, such as the elderly, sometimes address the need for access by moving to live in residential facilities which are located close to shopping centres, so that they can walk.

The link between the hierarchy of shopping centres and the system of public transport was investigated for Christchurch. The mode of accessing shopping centres will be explored in more detail during the case studies in Stage 3 of this research programme.

The use of public transport is becoming an increasingly important option in Christchurch - for those who do not have the option of a private vehicle, or who make a conscious choice to use this alternative mode. Services are structured into core and community services, with core services providing the most frequent connections. According to Environment Canterbury, the most popular bus service in Christchurch is the Orbiter. Its circular route connects nine shopping centres altogether, six of which include large malls as their main retail facility. The Orbiter also provides access to numerous schools along its route, and to a number of other community facilities such as Princess Margaret Hospital, Pioneer Leisure Centre, Jellie Park Aqualand, cinemas in Northlands Mall, and the University of Canterbury. The next busiest core service - New Brighton to Hornby - connects four shopping centres including three with malls.

Public transport is most relevant to sub-regional and district level centres in the hierarchy, as shown in Table 8. Local shopping centres are more likely to be accessed by a variety of private means - car, bicycle or on foot.

**Table 8: Numbers of bus routes connecting with shopping centres<sup>20</sup>**  
 (Centres highlighted in bold type are those involved in the previous analysis)

	<b>Orbiter</b>	<b>Other core</b>	<b>Other services</b>	<b>Total</b>
<u>sub-regional:</u>				
<b>Papanui</b>	<b>1</b>		<b>4</b>	<b>5</b>
<b>Riccarton</b>	<b>1</b>	<b>1</b>	<b>6</b>	<b>8</b>
<u>district:</u>				
<b>Shirley</b>	<b>1</b>	<b>2</b>	<b>2</b>	<b>5</b>
<b>Linwood</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>6</b>
Hornby		1	5	6
<b>New Brighton</b>		<b>3</b>	<b>3</b>	<b>6</b>
Church Corner	1		4	5
Barrington	1		1	2
Sydenham			6	6
Merivale			4	4
<b>Bishopdale</b>			<b>3</b>	<b>3</b>
<u>suburban:</u>				
<b>Avonhead</b>			<b>2</b>	<b>2</b>
<b>Woolston</b>			<b>3</b>	<b>3</b>
Richmond		2		2
Addington	1		1	2
Parklands			2	2
Halswell			1	1
Edgeware			2	2
Wairakei/Greers	1		2	3
Aranui		2	1	3
Ilam			1	1
St Martins	1		1	2
<b>Redcliffs*</b>			<b>2</b>	<b>2</b>
<b>Sumner*</b>			<b>2</b>	<b>2</b>
Hillmorton			1	1
Fendalton			3	3
<b>Belfast</b>			<b>1</b>	<b>1</b>

(\*) Redcliffs and Sumner are associated with the Ferrymead location.

The data in Table 8 illustrates the point that the larger (and generally older) shopping centres are better served by public transport than the smaller centres.

### 3.3 Perspectives on multiple amenity and co-location

The multiple amenity of shopping centres was also investigated using a survey to produce a mix of quantitative and qualitative results. Personnel in a sample of 44 community activities and health services located in the vicinity of Papanui (14), Riccarton (11) and Shirley (19) shopping centres were interviewed. The breakdown of these categories is presented in Table 9.

**Table 9: Categories of community facilities surveyed**

Non-retail category	Papanui	Riccarton	Shirley	Whole sample
Central Govt agency	3	3	1	7
CCC agency	1	2	2	5
Schools, creches, etc	2	1	3	6
Aged residential care	2	2	3	7
Health services	4	2	6	12
Sport/recreation	1	1	1	3
Church/voluntary	1	-	3	4
All groups	14	11	19	44

When asked about the advantages of location for these non-retail activities, 82% responded explicitly that “closeness” or ‘proximity’ to the mall or shopping centre was a major advantage. This is linked, again explicitly, to aspects of ease of access and proximity to main public transport routes, and to convenient off-street parking facilities. Some also made reference to the increased ‘visibility’ afforded their activities, and to being close to the focus of community activity and people traffic.

Proximity to other organisations or facilities was also mentioned variously by a number of those interviewed - closeness to banks, to schools, to medical centres and pharmacies, to churches, to libraries, and so on. Two-thirds of the community organisations had particular links with other social services or community organisations nearby (29/44), and also particular links with businesses nearby (28/44). These links can perhaps be most usefully described in terms of clusters, from the perspective of particular categories of activity, as follows:

Providers of medical and health services: such organisations have strong links with other health providers nearby, as well as central government agencies such as nearby WINZ, CYF, ACC offices. Relationships with other nearby businesses are common for both general and specific supplies.

Central Government agencies: (eg: WINZ, Housing NZ, Police, CYF, etc.), the strongest links for these agencies are both with other agencies or community/service organisations located close by. Proximity to a bank is important for some government agencies because of their roles in providing financial assistance. For several central government agencies, their co-location in shopping centres is as a direct result of government policy directives requiring them to be out in the communities they serve, rather than located in the City’s central business district as they used to be.

Operators of residential facilities for the elderly: these organisations display a high degree of dependence on both community organisations and businesses nearby, reflecting a strong community association coupled with physical ease of access - sometimes on foot. There are strong links with specific voluntary community groups (eg: RSA, Clubs, etc) and with nearby businesses including

malls, banks and pharmacies. In this instance, the link with malls and centres generally serves both functional and social needs.

Schools, kindergartens and creches: schools and pre-schools develop associations with a wide range of organisations in their local communities, including retail businesses - to provide learning opportunities, to access or exchange resources, and for financial support.

Churches and voluntary organisations: for this group the strongest links are with community and service organisations - providing services to particular client groups (e.g. youth programmes, holiday programmes, visiting programmes for elderly, etc), and sharing resources (e.g. use of buildings).

Two-thirds of the organisations also reported experiencing negative effects as a result of their location in relation to the shopping centre. Half (22/44) referred to problems associated with private motor vehicles, with one-quarter (11/44) specifying parking issues and one-third (15/44) traffic speed and traffic congestion issues. The latter were described as being of particular concern for the elderly, parents with young children, and cyclists. These issues emphasise the growing importance of traffic control and pedestrian safety in these places if both functional and social amenity values are to be maintained or enhanced.

Several respondents (5/44) commented that certain locations within centres are more advantageous than others. For example, one recreational organisation noted that while being close to the main thoroughfare, their location is not actually directly visible from it. Several schools commented on the fact that their pupils are very much in the spotlight and their behaviour subject to critical scrutiny because of their close proximity to the shopping centre. Two health services noted the constraints on their expansion due to zoning restrictions

## 4 Retail sector development trends

### 4.1 Retail development patterns

An examination of the key dates of development and expansion in seven major retail facilities highlights what appears to be a development cycle that occurs within the retail sector (see Table 10).

**Table 10: Expansion dates**

Location	Expansion dates	Years between expansions
<b>Expansion dates of selected Christchurch major retail facilities</b>		
Riccarton	Opened 1965	-
	1974	9
	1979	5
	1995	16
	2003*	8
Papanui	Opened 1967	-
	1995/1996	28
	2002*	6
Linwood	Opened 1986	-
	1988/1989	2
	1996	8
	2001	5
	2002	1
Shirley	stand-alone supermarket ~1976	-
	The Palms 1996	20
	2002	6
<b>Expansion dates of selected Auckland and North Shore major retail facilities</b>		
St Lukes	Opened 1971	-
	1990/1991	19
Greenlane	Opened 1982	-
	2000	18
Glenfield	Opened 1971	-
	1986	15
	1991	5
	1999/2000	8

(\*) planned but not completed as yet

This preliminary investigation, carried out on a limited selection of major facilities points to a cycle of re-development that occurs in the retail sector for major retail facilities. This cycle of re-development involves the renovation, upgrading, and extension of shopping centres.

Although the investigations are at an early stage, it appears that for the earlier/older malls, a longer period lapsed before any re-development took place. The late 1980s to early 2000s, however, have seen frequent expansions in most of the selected centres, with shorter periods apparent in between expansions. Tansley (2003b) attributes this trend to “an exceptional expansion in public spending power (a combination of household growth and greater disposable household incomes) in the last decade. The major players have invested to capture their share (or an increased share) of the market.”

If it is accepted that there is a link between the evolution of retail functional amenity and social amenity and community role, then this cyclic pattern in retail development has implications for the latter. It raises questions such as -

- how does the progressive development of retail infrastructure impact on the delivery of social and community services and the ability of service providers who operate in the shopping centre to deliver services?
- to what extent and in what ways are territorial local authorities consciously planning for the enhancement of social amenity in their shopping centres?
- in urban settings such as shopping centres, to what range of purposes are developers' financial reserve contributions put? What attention is given to the provision of multi-purpose public open space in any centres below regional centres?

#### **4.2 Changes to the scale and composition of suburban shopping centres over time**

Changes to the scale of suburban shopping centres over time were analysed by comparing data collected during this research with data available from a 1991 Christchurch City Council survey (see Table 11).

**Table 11: Relative numbers of retail/commercial facilities and changes over time for selected shopping centres (1991-2002)**

Location	2002 survey # retail/commercial facilities				1991 survey
	within the 'main retail facility'	within the 'retail centre' <sup>21</sup>	in the neighbouring 2-3 blocks	Total	Total
<u>sub-regional:</u>					
Papanui	70	131	10	211	180
Riccarton	82	142	26	250	234
<u>district:</u>					
Linwood	35	40	6	81 <sup>22</sup>	94
Shirley	62	21	5	88 <sup>23</sup>	39
New Brighton	n/a	133	10	143	no data
Bishopdale	n/a	57	5	62	52
<u>suburban:</u>					
Avonhead	19	2	3	24	11
Woolston	n/a	40	3	43	44
<u>Large, out-of-centre retail:</u>					
Ferryhead	1	66	0	67	15 <sup>24</sup>
South Belfast	3	2	0	5	0

For six of the eight centres, for which data were available, there has been an increase in the number of retail/commercial facilities over the last 10 years. The data for Ferryhead indicate the significance of the role of a main retail facility (in this case a stand-alone supermarket) in acting as a nucleus for further retail development. A year-by-year analysis of business start ups in the Ferryhead location shows that in the three years since the new Woolworths store was granted its resource consents, 28 businesses opened, compared with 30 businesses opening in the six years which preceded the granting of these consents.

It is also evident from this analysis that there has been a marked increase in the numbers of places to socialise (restaurants, etc) in all centres for which we have comparative data. In other words, the strength of this element of social amenity has been increasing significantly in recent times. Between 1991 and 2002, the numbers of places to socialise in the larger centres increased by over 200% while in smaller centres the increase was still substantial, at 160%

While there has been an increase in places to socialise, there has been marked decrease in the number of banks located in shopping centres - down by 40% for the eight shopping centres in the sample which existed ten years ago. However, this trend is not uniform across the sample. The

<sup>21</sup> The numbers in this column do not include the numbers in the previous column; i.e. they are in addition to the numbers of retail activities within the main retail facility.

<sup>22</sup> The Eastgate Mall in Linwood is currently undergoing a significant expansion. The number given relates to the pre-expansion situation.

<sup>23</sup> The Palms Mall in Shirley is currently undergoing a significant expansion. The number given relates to the pre-expansion situation.

<sup>24</sup> This estimate comes from data on dates of opening of existing businesses, not from the 1991 survey.

decline for the two sub-regional centres averaged 32% while this decline for the suburban centres averaged 67%. While it must be acknowledged that banking has undergone a significant technological transformation over this period, the point to note here is that its contribution to place-related functional and social amenity has changed, and it has changed more for smaller shopping centres than for larger shopping centres.

## 5 Discussion

### 5.1 Recent Environment Court decisions

In Section 3, attention was drawn to the mix of functional and social roles in retail development, a fact which is well established in the international literature (see McClintock et al., 2001). It was noted that this mix of roles is only gradually being acknowledged within the formal (legal) planning processes in New Zealand. Indeed, it was stated in a recent Environment Court decision<sup>25</sup> that “... adverse effects on trade competition may have consequential effects on the viability of existing retail centres, and indirectly on the ability of communities they serve to provide for their economic and social well being. If that is shown, then it can be appropriate to consider those consequential and indirect effects, although trade competition is excluded from consideration.” In another recent case<sup>26</sup>, Judge Treadwell found that a new retail facility should not be built at the expense of an existing centre with the multiple amenity values the community has built up over time.

### 5.2 Links between consumption behaviour and the creation of social amenity

The research reported here is intended to be a contribution to the debate and empirical knowledge on the multiple amenity values generated by retail developments. It has looked particularly at how retail developments may accumulate over time, with signs of diversification and durability, and thereby create the infra-structural environment in which retail functions are complemented by social and community services to generate social amenity.

Even though it is limited in scope<sup>27</sup>, the New Zealand empirical evidence presented here supports the proposition that frequent and regular consumption activity (i.e. the purchase of food and groceries) creates patterns of social behaviour and interaction which foster opportunities for enhanced functional amenity and also for enhanced social amenity, if the conditions are favourable. Centres for retailing - shopping centres - become more than merely centres of consumption activity. Co-location creates opportunities for synergies between competing or complementary retail activities, for synergies between consumption activities and recreational and leisure activities, and for synergies between consumption activities and the delivery of non-commercial social services (health, education, welfare and public security).

The empirical evidence analysed here also points to there being some inertia or lag between the commercial dynamic and the associated social and community dynamic. It takes time for social and community infrastructure and patterns to build around emerging retail centres. Ferrymead and South Belfast are examples of this. However, the status of retail centres within the overall retail hierarchy is not something that is fixed in time. Some retail centres may stagnate and decline in comparison to others, resulting in a functional change. When this happens, after a sustained period of development, they may find themselves associated with a more substantial and diverse community

<sup>25</sup> A decision by Judge Sheppard to decline consents for an ‘out of centre’ retail development at Wairau Park in North Shore City (Decision No. A182/2002).

<sup>26</sup> Variation No 1 to the Upper Hutt City Plan and an application for Resource Consent by Valley Plaza Ltd to the Upper Hutt City Council.

<sup>27</sup> Since Stage 2 of this research programme was intended to help the research team prepare for the community case studies (Stage 3) which are the primary focus of the research programme.

infrastructure than would otherwise be expected. New Brighton, Bishopdale and Woolston are examples of these.

### **5.3 Implications for policy planning**

Acknowledgement of this dynamic has implications for many aspects of urban planning as well as private and community investment decision making.

At present, the notion of a hierarchy of centres has been expressed most commonly in the context of the distribution of retail activity. In this analysis, an attempt has been made to adopt a functional basis for the hierarchy of centres. It may be that this concept could provide the foundations on which to build a more comprehensive and integrated notion of centres within the urban setting for the purposes of district policy and planning. If this is accepted, then the concept of 'centre' will have to be expanded to incorporate the other dimensions of urban activity and pattern - settlement, social services, social amenity, mobility/transportation, public administration, community identity, recreation and leisure, and so on. In doing so, it would be important to maintain a functional basis for developing such an integrated notion.

At another level in the formal planning process, which in New Zealand involves the assessment of effects in the Resource Management Act regime, the research reported here helps to construct a more comprehensive framework for assessment. As noted in Section 3.1, a balanced view of the experience which nearby residents and businesses have of being in proximity to a large retail facility comprises both the on-site amenity effects as well as the potential off-site environmental effects.

## References

Hames Sharley, 2001: B4 Zone Retail Impact Assessment. Prepared for Christchurch City Council.

Tansley, M.G. 2003a: Pers.Comm.23 June 2003

Tansley, M.G. 2003b: Pers.Comm.17 June 2003

McClintock et al., 2002: Large Retail Developments - Sector Review. Working Paper FS23. Taylor Baines & Associates, Christchurch.

# Appendices

- Appendix I    Schedule of base data for the Taylor Baines study, provided by MarketPlace New Zealand Ltd
- Appendix II   Categories and codes used in the Christchurch analysis of retail and non-retail premises - ten suburban centres
- Appendix III   Compositional analysis of 12 shopping centres (Auckland, North Shore, Christchurch)

# Appendix I: Schedule of base data for the Taylor Baines study, provided by MarketPlace New Zealand Ltd

Facility	Key Dates	Code	Context	Activity Units	Function	Catchment*	Comment
<b>CHRISTCHURCH</b>							
Riccarton Mall 129 Riccarton Rd (Westfield)	Opened 1965 Extended 1995	Enclosed Mall 26,440m <sup>2</sup> gla	Dominant part of Riccarton Centre	79 Units:- Farmers, Kmart, Pak'n Save Foodcourt (7 units/seats 400) plus specialty shops & services	Comparison with personal goods orientation	Sub-regional- primarily Western Suburbs but trades to other City suburbs and Central Canterbury area	Further expansion of this Mall is proposed, lifting it to about 33,000m <sup>2</sup>
Northlands Mall 55 Main Rd Papanui (Kwi Property Trust)	Opened 1967 Extended 1995/96	Enclosed Mall 20,750m <sup>2</sup> gla	Dominant part of Papanui Centre	61 Units:- Pak'n Save, Farmers, Hoyts Cinema (6- screen) Foodcourt (7 units/seats 340) plus specialty shops & services	Comparison/leisure with personal goods orientation	District- primarily Northern City Suburbs and Mairaki District	The Centre is to be expanded by a planned 15,000m <sup>2</sup> to incorporate the nearby Countdown and add more shops and services. This will expand its catchment influence
The Palms cnr Marshland & New Brighton Rds (Sabina Ltd)	Opened 1996	Mostly enclosed Mall 21,970m <sup>2</sup> gla	Provides bulk of Shirley Centre	51 Units:- Kmart, Big Fresh Foodcourt (6 units/seats 365) plus specialty shops & services	Comparison with personal goods emphasis	District- primarily North-east and Eastern Suburbs	Centre expanding modestly to accommodate Farmers Dept Store in 2002
Eastgate Shopping Centre cnr Linwood & Buckleys Rd (National Property Trust)	Opened 1986 Extended 1996	Enclosed Mall 10,225m <sup>2</sup> gla plus freestanding The Warehouse 9,000m <sup>2</sup> gla	Dominant part of Linwood Centre	35 Units:- Countdown Foodcourt (5 units/seats 250) plus specialty shops & services plus adjacent The Warehouse	Convenience/limited personal goods comparison	District- Primarily Eastern Suburbs and Inner South-east	Expansion of over 11,000m <sup>2</sup> will be complete in 2003, incorporating The Warehouse, lifting the Mall to 30,500m <sup>2</sup> and changing its function to primarily comparison
Canterbury Supa Centa (former Properties)	Opened in part 2001. Balance over 2 years	Bulk retail centre 11,150m <sup>2</sup> gla expanding to 31,000m <sup>2</sup>	Discrete centre - medium-large floorplate outlets	Being developed to about 20 units including The Warehouse, Smiths City and Woolworths (under construction)	Emphasis mainly on household goods	District, but potentially Sub- regional:- Northern City Suburbs, plus North Canterbury	Open plan layout and category store approach - major specialist outlets, no small retailers
Woolworths Supermarket Fernmead (P D Sloan)	Opened 2000	Supermarket 3,700m <sup>2</sup> gla	Stand alone outlet	Mixed use environs with some 20,000m <sup>2</sup> gla of adjacent retailing space under way in same area	Grocery/food shopping	Suburban:- South-eastern Christchurch	Supermarket likely to end as one anchor of a smaller "Belfast-type" precinct

\* in context of wider centre if appropriate

Facility	Key Dates	Code	Context	Activity Units	Function	Catchment*	Comment
<b>AUCKLAND</b>							
St Lukes Centre 80 St Lukes Rd Mt Albert (Westfield)	Opened 1971 Extended 1990/91	Enclosed Mall 33,310m <sup>2</sup> gla on two levels	Stand alone shopping centre. Other retail outlets have established nearby	122 Units:- Kmart, Farmers, Foodtown, Foodcourt (7 units/seats 425) plus specialty shops & services	Comparison with personal goods orientation, potentially enhanced by redevelopment	Sub-regional:- primarily serves most of the Western Isthmus	Expansion to 65,000m <sup>2</sup> is being sought, but a much lesser extension, including specialty shops and an 8-screen Multiplex Cinema is under way, on and above the former Big Fresh site, opening in 2003
Harvey Norman Centre 20-58 Mt Wellington Highway (Body Corporate)	Opened 2001	Bulk retail centre 21,200m <sup>2</sup> gla	Discrete centre, close to other mixed use retail activities, medium- large outlets	11 Units, including Harvey Norman, The Warehouse, Rebel Sports, Biscos	Large store, mainly household goods emphasis	Sub-regional for Harvey Norman, otherwise district-style (Eastern Isthmus)	Open plan layout, but not large enough to dominate
NewWorld Smtk College Hill (Nat Trading Co)	Opened 1999	Supermarket about 3,600m <sup>2</sup> gla	Stand alone outlet, near Inner City markets	Not part of any other centre, now or potentially	Grocery/food shopping	Suburban/inner City, inner Western Suburbs, intercepting some North Shore trade	Very high volume store, benefiting from Inner-City apartment boom
Foodtown Smtk Greenlane (Progressive Enterprises)	Opened circa 1982 Expanded 2000	Supermarket about 4,200m <sup>2</sup> gla	Stand alone outlet	Not part of any other centre	Grocery/food shopping	Suburban- primarily Newmarket, Remuera, Greenlane, One Tree Hill, Mt Eden	Very high volume outlet, benefits from supply vacuum to the west
<b>NORTH SHORE</b>							
Glenfield Mall crr Glenfield Rd & Downing St (Westfield)	Opened 1971 Extended 1986 Redeveloped 2000	Enclosed Mall 29,795m <sup>2</sup> gla on three levels	Dominant part of Glenfield Centre. Balance of centre mainly service- orientated	117 Units:- The Warehouse, Woolworths, Farmers, Foodtown Foodcourt (11 units/seats 600) plus specialty shops & services	Comparison with personal goods orientation	District:- primarily draws custom from Western North Shore suburbs	Experiencing relatively difficult trading conditions due to competition levels and layout
Albany Mega Centre Don McKinnon Drive (Alb Power Centre The Warehouse & Placemakers)	Opened 1997	Bulk retail centre 35,880m <sup>2</sup> gla	Medium-large floorplate retail- first stage of planned complex incorporating Mall and other shops on nearby sites	22 Units:- The Warehouse, Placemakers, Farmershome, Biscos, Rebel Sports and large specialty shops	Comparison shopping pure and simple, with a range of major destination stores	Sub-regional:- primarily North Shore and Rodney District	Originally intended as as household goods retail fringe but has pre- empted the planned Centre Core and become a major comparison destination. Huge Pak'n Save nearby in separate precinct

\* in context of wider centre if appropriate

## Appendix II: Categories and codes used in the Christchurch analysis of retail and non-retail premises - ten suburban centres

<b>RETAIL</b>		<b>Code R</b>
1.	Anchor stores	R1
	a: supermarket	
	b: department store	
	c: other major stand alone store	
2.	Retail goods	R2
	a: food (e.g. butchers, bakeries, delicatessens, etc.)	
	b: fashion/clothing/footwear/accessories	
	c: sport/leisure/outdoor	
	d: appliances/electrical goods/specialist equipment/computers	
	e: furniture/homeware	
	f: gifts/toys/hobbies	
	g: books/magazines/stationery/music	
	h: pharmacy	
	i: liquor	
	j: miscellaneous	
	k: car sale yards	
	l: dairy	
	m: not for profit retail (e.g. church selling recycled goods)	
	n: takeaways (unless if eating on the premises)	
	p: petrol stations	
3.	General retail services	R3
	a: hairdressers, beauty salons, ...	
	b: tuition services, including dance tuition, private education tuition	
	c: automotive repair, automotive engineering (if separate from petrol stations)	
	d: electrical goods/computer servicing	
	e: veterinary clinics	
	f: miscellaneous	
4.	Commercial/financial services	R4
	a: banks	
	b: post offices, post shops, postal agencies	
	c: other professional/business services - insurance, real estate, accountancy, law, etc.	
5.	Health-related services	R5
	a: doctors	
	b: dentists, optometrists, physios, psychologists/counsellors, ...	
6.	Eating places	R6
	a: restaurants, cafes, bars (eating on the premises)	
	b: hotels without accommodation	

7.	Entertainment & recreation	R7
a:	cinemas, time-outs,	
b:	gyms	
c:	Ticketek	
d:	video hire	
e:	TAB outlet	

8.	Empty retail shop	R8
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9.	Accommodation i.e. motel, B&B, etc.	R9
a:	motels, hotels with accommodation	
b:	B&B	

Other possible premises could include -

Manufacturing - factory	I1
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- factory with shop outlet	I2
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Warehouse	I3
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## **NON-RETAIL SERVICES AND FACILITIES** **N**

- schools - kindergartens (commercial creches), primary, secondary	N1
- churches	N2
- retirement/aged care complexes/other residential facilities for certain groups	N3
- community centres/halls/meeting rooms/Plunket	N4
- recreation facilities (pools, parks, playgrounds, libraries, ...)	N5
- local government service centres	N6
- central government agency premises (WINZ, HNZ, CYPS, MP's offices, ..)	N7
- voluntary organisations premises (e.g. church based social services)	N8
- Police/Community constable office	N9

## **AMENITIES** **A**

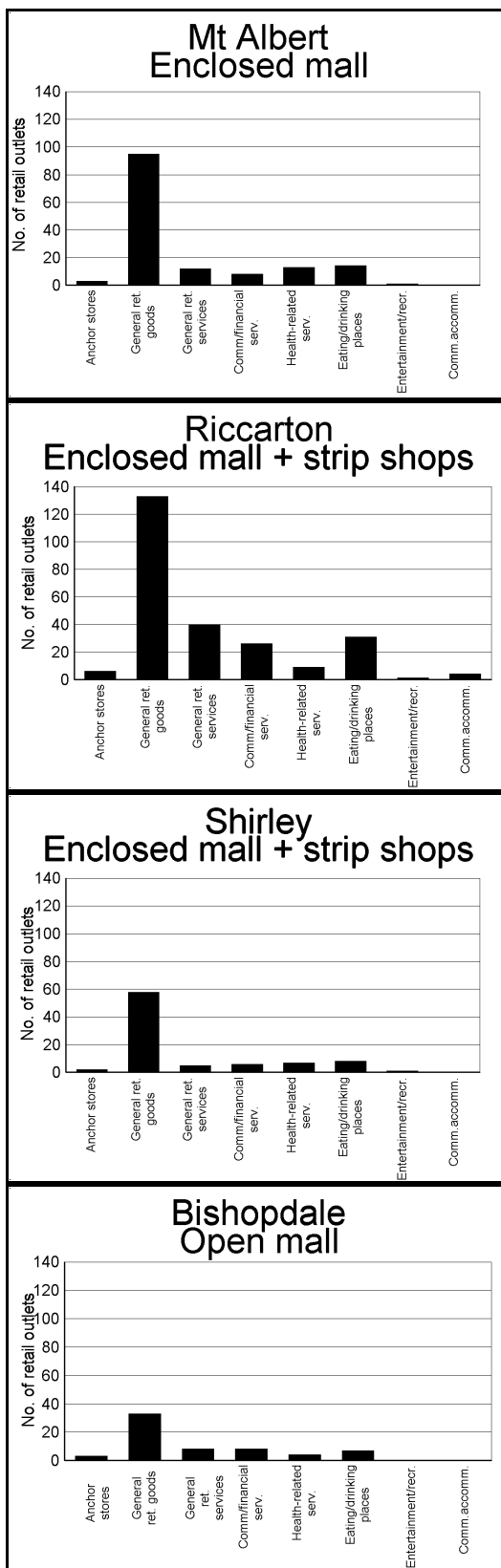
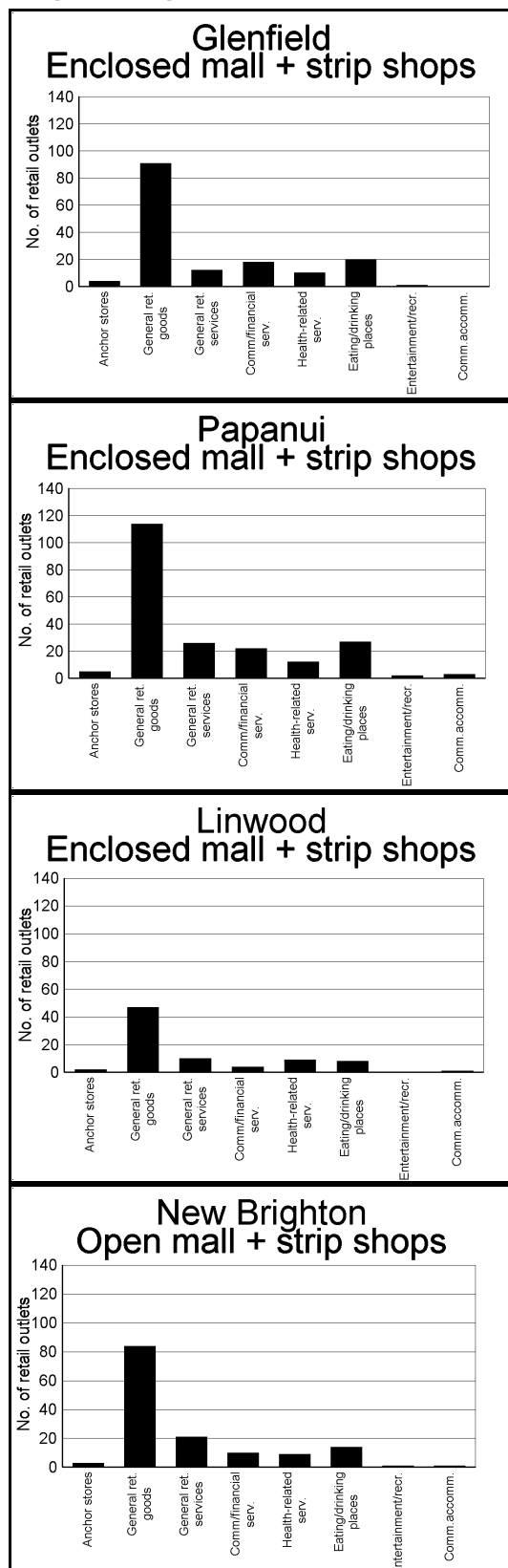
Public toilets	A1
Seating	A2
Rubbish bins	A3
Changing rooms	A4
Public telephones	A5
Public/community notice boards, information centres, CIB	A6
Used clothing collection bins	A7
ATMs where there is no bank	A8
Letterboxes	A9

## **TRANSPORT/TRAFFIC INFRASTRUCTURE** **T**

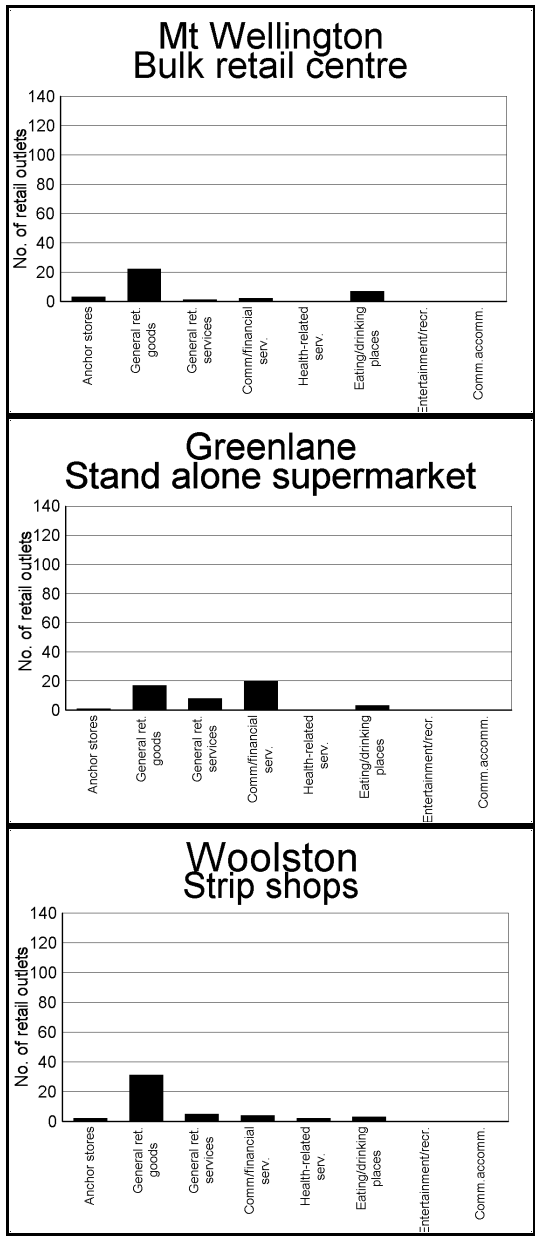
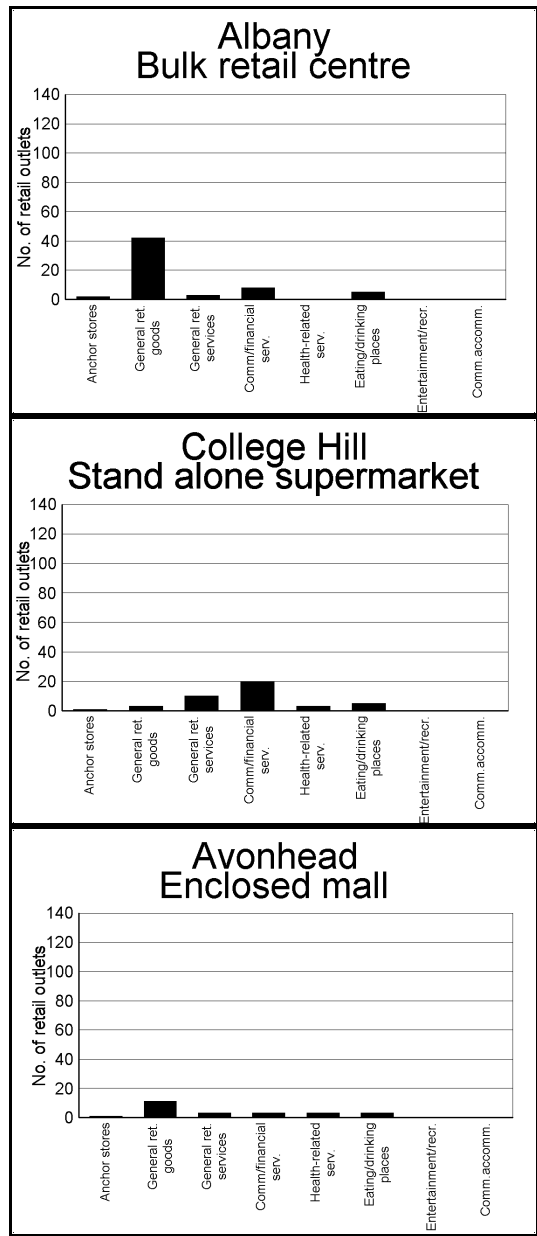
Bus stops	T1
Taxi ranks	T2
Traffic lights	T3
Pedestrian crossings	T4
Car parking - off-road car parking (public or private)	T5
Areas of kerb-side restricted parking (P5, P30, P60, P120, ...)	T6

## Appendix III      Compositional analysis of 12 shopping centres (Auckland, North Shore, Christchurch)

### Larger, longer established centres



Smaller centres and bulk retail



Recent ‘out-of-centre’ developments

