RETAIL STRATEGY FOR NAPIER

Adopted by Council 29 October 2003

RETAIL STRATEGY FOR NAPIER

29 October 2003

Connell Wagner

DELTA Consulting

URBAN Initiatives

1 Purpose of Study

To develop a strategy for managing the future development of retailing in Napier to enable the people and the community of Napier to provide for their social, economic and cultural well-being by:

- Sustaining the potential of the existing physical resources of the City to meet the needs of future generations.
- Enabling an efficient, competitive and innovative retail sector through effective land use planning and local governance.
- Ensuring that the location of retail activities leads to efficient use and development of the infrastructure resources of the City.
- Maintaining and enhancing the high levels of amenity enjoyed by the residents and visitors to Napier.
- Recognising and protecting the Art Deco heritage values of the City by ensuring that future retail activities complement and maintain these values.

2 Evolving Retail Patterns: The Place of BBR

- The question has been asked as to whether the debate should be about "why or why not" more Big Box Retail (BBR) should be allowed into Napier, as opposed to the debate about "where and how much" BBR to allow.

- This statement implies that BBR is a new phenomenon for Napier. This is factually incorrect as there are already major BBR players in the Central City and elsewhere in urban Napier: Farmers, The Warehouse, Briscoes, Lighting Direct, Retravision, The Warehouse Stationery, Noel Leeming, Bond and Bond, Mitre 10, to name a few. There are also some BBR players in the Taradale Rd retail precinct, eg. Placemakers.

- These retailers have been present for some time, without any obviously negative effects for the Napier community. The evidence is that customers have supported these facilities, and many of these retailers are now looking for larger premises.

- By and large the specialty retailers, especially in the Central City have already adapted to their bigger neighbours, and are still in business. Customers have voted with their wallets and their feet.

- Much has been said about the supposed international experience of BBR which has largely been reported as negative. This has created an incorrect impression, as a review of the evidence shows the impacts are mixed, and there is no real clear pattern. There are also examples of where BBR has worked well for a community as well as examples of where it has apparently not. In the latter context, many examples refer to the USA retailer Wal-Mart.

- While Wal-Mart is undoubtedly a powerful retailing force, and the world's largest retailer, and has had an arguably negative impact on some very small towns, this does not mean the situation is directly comparable to the NZ situation, and will inevitably happen here.

- No local retailer has the same degree of competitive dominance that Wal-Mart has in many small towns – The Warehouse is a strong player to be sure, but in many categories it has very tough competition from players like Briscoes, Farmers and Noel Leeming.

- The demise of Deka is an example of what happens to retail "icons" when they no longer meet consumer needs.

- Many of the so-called objections to BBR appear to emanate from those implicitly seeking some form of protection from trade competition. This is especially true of some smaller retailers.

- It is necessary to ask ourselves whether we can realistically expect to exist in a time capsule. Who would do without the convenience of the supermarket format today ? Who would be prepared to put up with the high prices, shoddy service and poor surroundings of shopping for food and groceries at the local dairy/corner superette - as happened in the past prior to the advent of supermarkets, and is often still true today ? (this is admittedly a generalisation).

- The key point is that the development of retail formats move in cycles, and the BBR format is no different. The ultimate sustainability of BBR will be determined by whether customers vote for them with their feet and wallets.

- Of course, smaller retailers do not need to sit idly by, like "possums in the headlights". They have the advantage of being nimbler, and being able, if well organised, to offer their customers a superior level of service, often difficult to get in BBR. This often requires investment in key areas of the business: IT systems, marketing, staff training and so on. The choice is theirs as to whether they choose to respond.

- Consumers benefit from competition, provided it is neither dysfunctional nor destructive. The evidence from elsewhere in NZ is that consumers want BBR as part of their choice. Retail sales in BBR formats now account for almost 20% of retail sales, up significantly over the last 5 years.

- BBR can contribute positively to communities. BBR-related development activities are likely to affect land prices positively, freeing up money for the local economy, and promoting the more efficient use of infrastructure and resources.

- They can stimulate net job creation in the retail and service sector, and from those firms supplying the BBR: transport operators, couriers, security services, communications, cleaning, catering services, accountancy, personnel services and so on.

- It is also significant that retail is often an industry which attracts young people – the further development of the retail industry in Napier can play a role in helping to retain younger people in Napier.

- This is not to suggest that BBR will only have positive effects, rather to make the point that there are potential positive effects to be considered along with the potential negative effects which are often claimed.

- Finally, it is unlikely a local authority can prevent BBR development under district plan provisions. In addition, any amendments to the district plan which are perceived to be draconian, and hence challenged by developers or BBRs, are likely to prove to be very difficult to defend, without a robust policy framework based on sound logic.

- The purpose here is to construct that policy framework (not necessarily "draconian") as part of the retail strategy (which includes both management and incentive elements), so as to shape the way in which BBRs can establish in Napier, to maximise the positive opportunities, minimize the potential negative effects, and to ensure that the community benefits in a balanced way.

- A policy framework based on the District Plan forms only one, but vital component of the retail strategy we have been asked to develop for Napier. There are other methods available as well.

- It is also important to consider the strategy should address the issue of specialty retailing as well. It would be a significant, mostly adverse, event, if a regional (specialty) shopping mall was established in Napier, or between Hastings and Napier, as this would undoubtedly impact negatively on the Central City. Our approach should be holistic, in trying to encourage both BBR and specialty retailers to locate as close as possible to the Inner City.

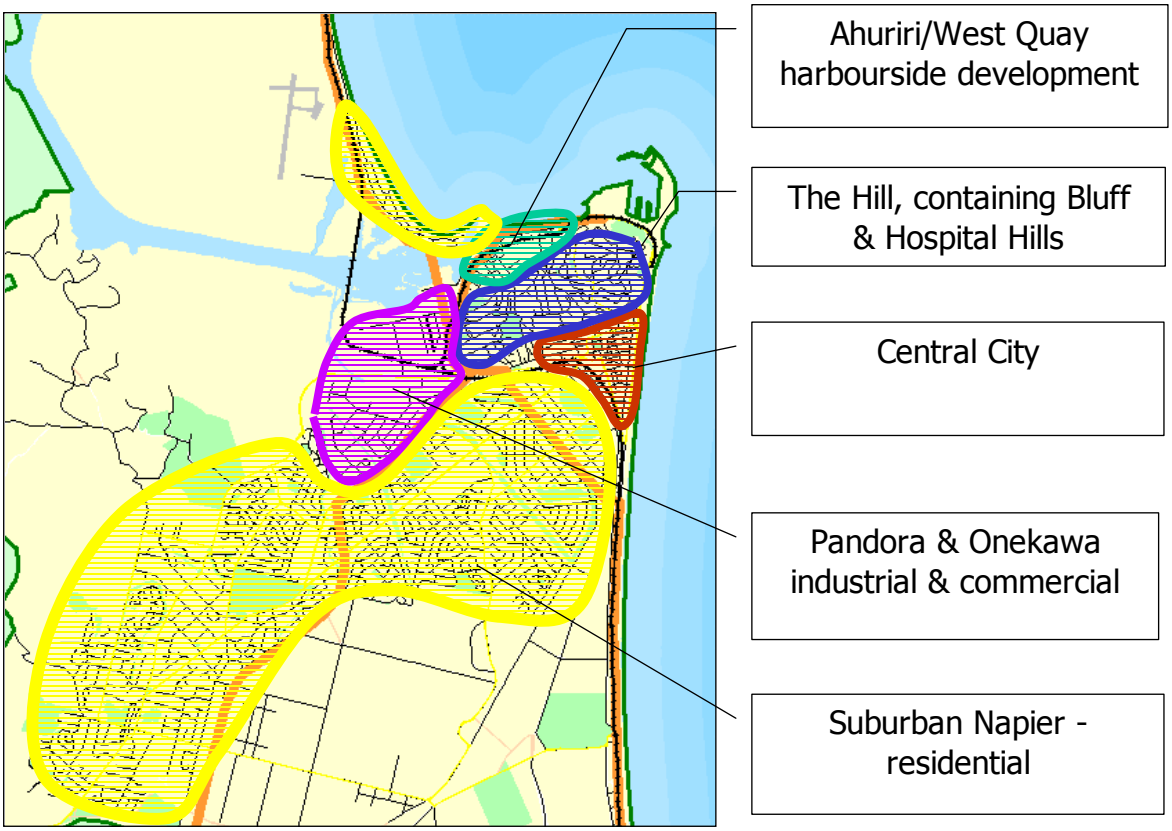
- The strategy should be managing and enabling, rather than controlling in its approach.

3 City and Regional Patterns

Napier is one of the two key cities of the Hawkes Bay and has a prominent role in the economy of the region. Some key features are:

- Napier now has 37% of Hawkes Bay's population and 45% of its retail spend
- The Inner City has developed into a robust centre of specialist retailing and leisure activity
- The growth of tourism has and will continue to contribute to the City's economy
- BBR outlets are an existing feature of retailing in Napier and there are a number currently scattered throughout the urban area of Napier
- Inner City retailing has survived and grown with the advent of BBR in Napier
- BBR retailing located on the fringe of the Inner City is contributing to its attraction for shopping and recreation

Defining Precincts



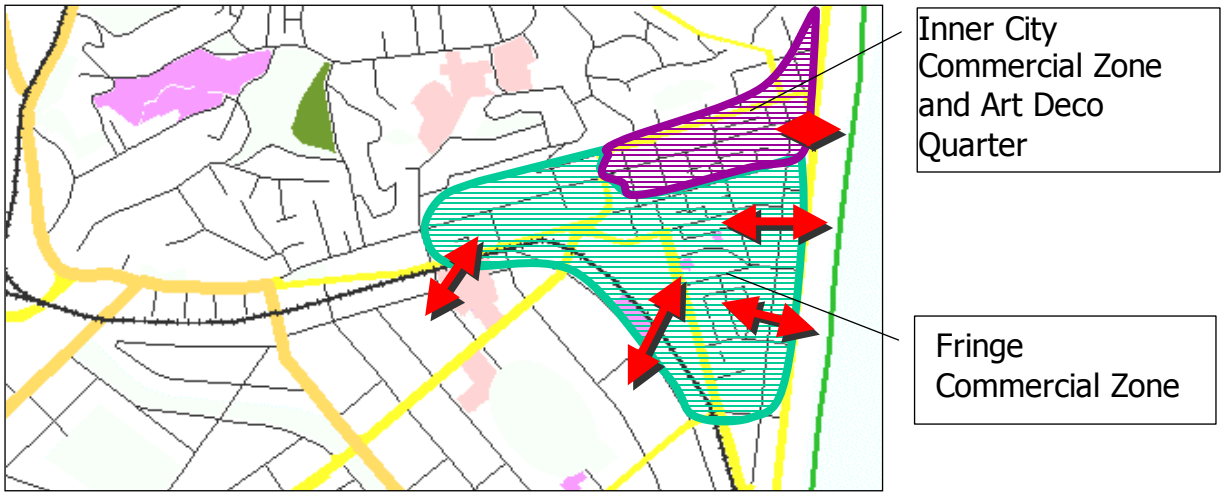
The City's precincts also play a vital role in support of business and as such are key elements of future retail in the City.

The characteristics of these areas are therefore also important in the analysis of the urban area. To get a perspective of their role their 'sense of place' is provided below.

Analysing layers of characteristics
Outlining the sense of place of the precincts and highlighting key elements, including:

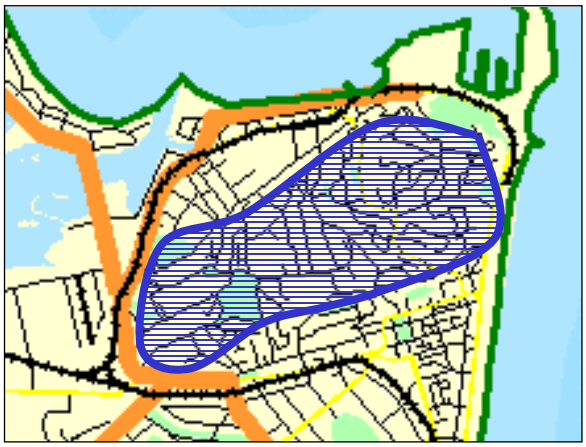
- Living
- Leisure
- Tourism
- Access and circulation

Central City



- **Living**: only of subordinate nature, area dominated by retail and offices. Declining residential component.
- **Leisure**: Beach front activities, restaurants and pubs contribute to a lively environment, but dispersed offering (eg. Cinemas) diluting the potential.
- **Tourism**: Strong generator in the area: Art Deco of national importance. Not supported by other potential elements essential to create balanced urban environment
- **Access and circulation**: Access across railway physically limited and hill which limits interconnection with the surrounding residential area. Current Activities in the Fringe Commercial Zone are not conducive to easy flow from residential to Inner City area. There is also a lack of connection between Central City and beach front.

The Hill

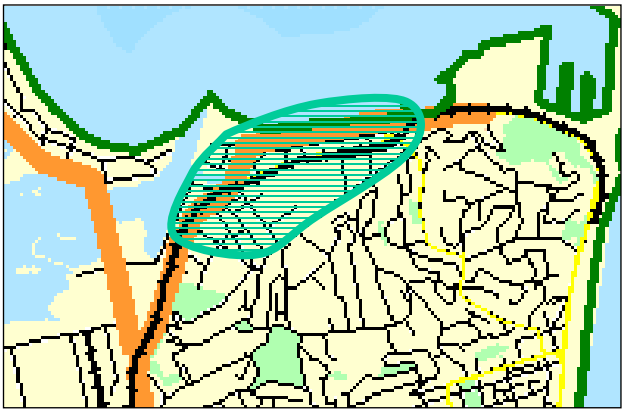


The Hill containing Bluff & Hospital Hills forms a distinct precinct

- **Living**: A select and evolving location for living, good infrastructure, schools
- **Leisure**: Parks and Botanical Gardens, stunning views
- **Tourism**: only has subordinate relevance (eg. Botanic Gardens)
- **Access and circulation**: limited but good access and interconnection with the Central City. Visually isolated position in the hills but within walking distance of the action.

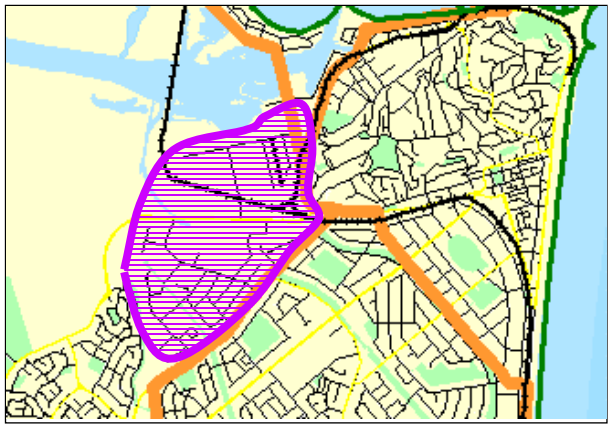
Ahuriri

The distinctive harbourside development which was a historic Maori site and later became an industrial site close to the port



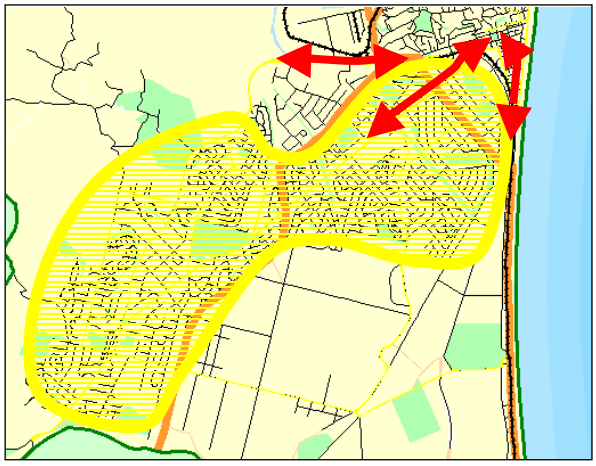
- **Living:** Fast developing but still limited residential, with mixed use activities
- **Leisure:** Popular boating, cafes, bars and recreational activities in what was once an industrial area
- **Tourism:** Popular destination for boating, fishing, dining and partying
- **Access and circulation:** De-facto highway running through the area, heavy vehicle circulation. Limited connections to Central City.

Pandora and Onekawa Industrial



- **Living**: No residential activity
- **Leisure**: Not a current destination, undervalued Inner Harbour
- **Tourism**: No activities
- **Access and circulation**: Good access to arterial roads, no direct connections to waterfront and Inner Harbour
- **Employment:** Highly diverse and valuable employment areas serving a regional catchment

Suburban Napier



- **Living**: Residential areas of Napier, low density, sprawl with considerable revitalisation taking place. Characterised by magnificent tree-lined boulevards
- **Leisure**: Numerous facilities (pool, reserves, parks) but no identifiable comprehensive design concept
- **Tourism**: Not significant relevance apart from scattered accommodation and key leisure and accommodation focus at Kennedy Park and pool activities
- **Access and circulation**: Well served with arterial roads. Many cul-de-sacs limit circulation within residential areas. New expressway opens up wider regional connections. Central City access essentially limited to east and west ends
- **Retail:** Focused on suburban requirements with new developments keeping it relevant

Recommendations

Apart from pure retail outcomes there are numerous aspects of the living environment which can assist to achieve positive outcomes for the Central City and suburban centres. These include:

- Promote clustering of activities (leisure, etc) in key locations as opposed to dispersal

- Improve the streetscape of the Fringe Commercial Zone to make it attractive to higher density residential and hotels/motels
- Promote a strong office core in the Central City
- Improve connections between the Fringe Commercial Zone and the surrounding residential areas
- Improve the access routes to the Central Area (quality and legibility, signage and identity)
- Create a stronger connection between the Central City and the Bay and clustering activities to proximity of those access points
- Promote other attributes of Napier City as well as Art Deco

4 Issues for Napier City

The study addressed the following key issues with regard to future location and development of retail facilities:

- Potential for deterioration of the Art Deco heritage of the City.
- Adverse effects on local amenity created by large-scale retail activities.
- Adverse effects on the sustainability of the existing physical resource of the City resulting from major "greenfield" retailing development.
- Heavy demands on the roading network of the City caused by inappropriate location of large scale retail activities.
- How to accommodate growth in demand for retail space.
- How to sustain the vibrancy of the Inner City and extend it to the whole of the Central City.
- Reverse sensitivity effects of retail activity in inappropriate locations.

5 Trends & Scenarios

The Scenario Planning technique has been used to assess the possible futures for Napier Retail. These scenarios assume that no changes are made to current policies.

Scenario Analysis

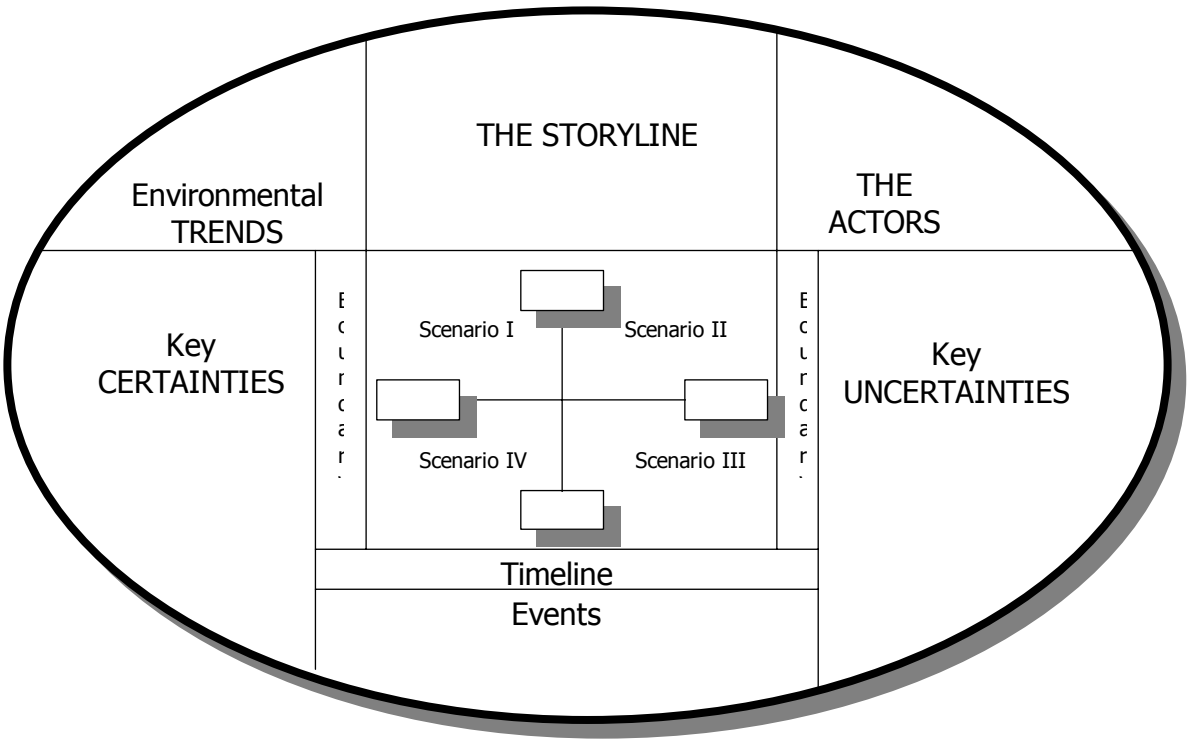
The analysis addresses the key questions which keep decision makers awake at night:

- What will be the economic and social impact of more BBR on the existing retail scene?
- What other tourist attractions can be created to support growth in tourism?
- Should Napier be competing or co-operating with Hastings? Other regional players?
- How do we balance economic growth while maintaining and enhancing Napier's quality of life?
- What strategy should be created in response to BBR that is both viable and defensible?
- Our focus is the medium to long-term, at least the next 5-10 years.

This is the storyline which the scenarios set out to answer.

Framework

The scenario framework is shown below:



Key Certainties

The following key trends have been identified as determinants of the future shape of Napier's retail environment:

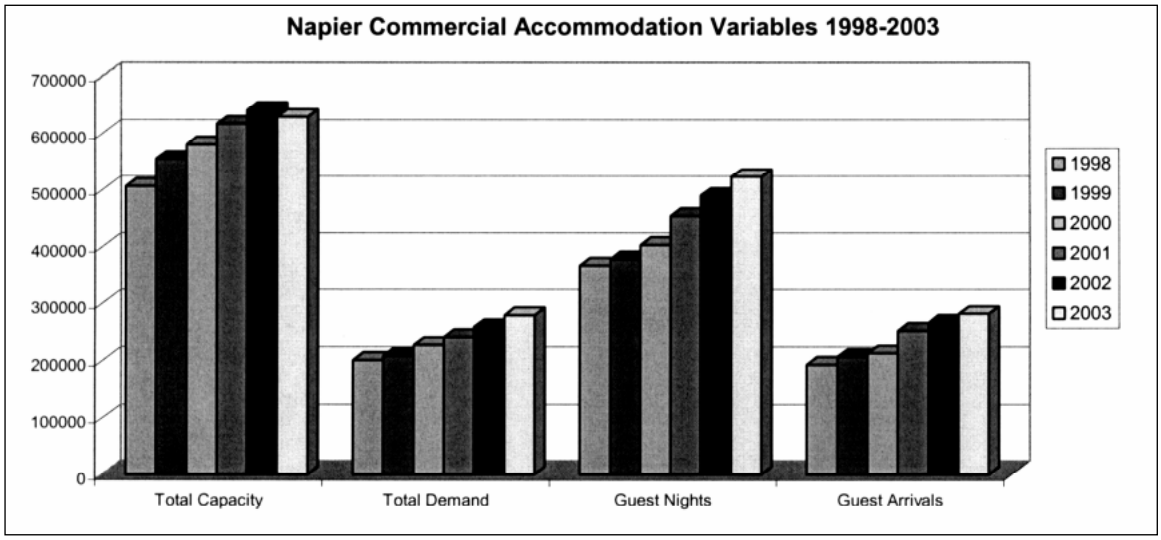
- Population:
  - Size (current): 55,000 (est.) [1]
  - Growth Rate (NZ): 0.5% p.a. (1.1%) for next 5-10 years

- Demographic Composition (NZ averages)[2]: current
  - Median age: 37.2 years (34.8)
  - Aged 65+: 15.2% (12.1)
  - Aged 15-: 22.3% (22.7)
  - Median income: $16,900 ($18,500)

Sources:

[1] Economic Solutions, April 2003

[2] 2001 Census



Visitor Growth

- Visitor growth will continue for the foreseeable future.

- Growth in January 2003 on last year: +6% to +7% [1]

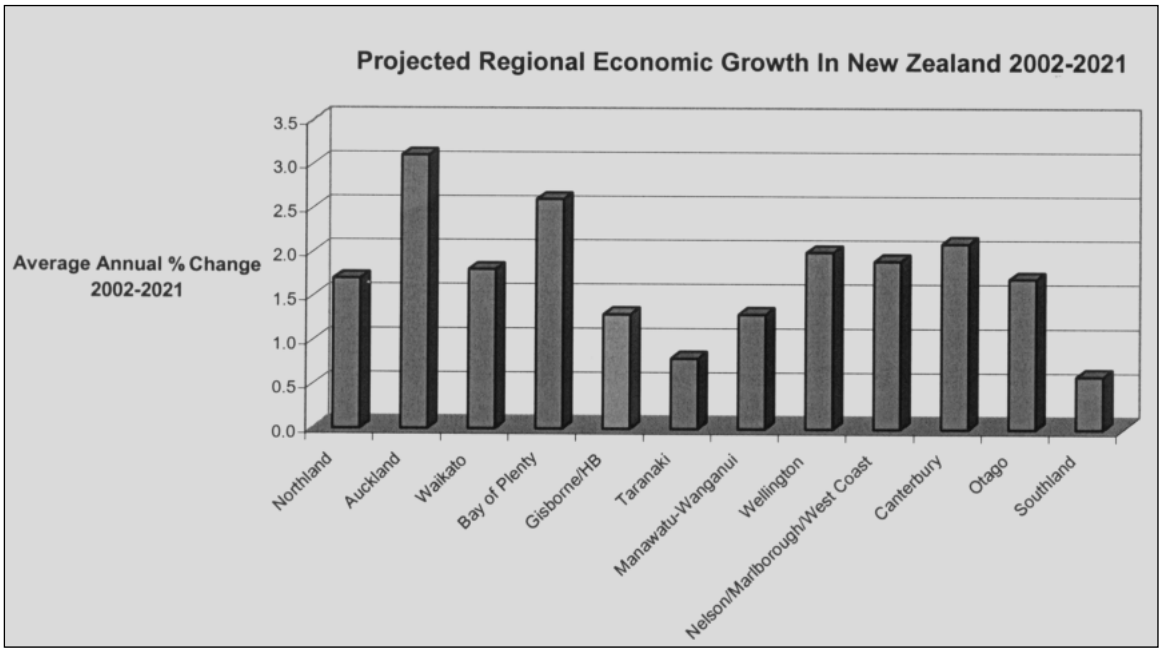
- Central City shoppers who were visitors [2]
  - 15% (2002)
  - 10% (1999)

Sources:

[1] Economic Solutions, April 2003, excludes those staying with family

[2] Central City Marketing

Economic Growth



Sources: NZIER.

Economic growth will continue at a rate in line with historical averages. The NZIER predicts growth of between 1 to 1.5% for the period 2002 – 2021.

Retail Market Growth:

We have assumed that growth in retail spend over the next 5-10 years will average 2% to 4% p.a.. This growth is likely to come from some population growth and migration, some visitor growth, and some increased retail spend per capita, as a result of increased economic activity.

Other Key Certainties identified in the Study:

- Ageing population and stable growth
- Growing visitor numbers
- Art Deco resource will be retained
- Physical constraints to growth and developments of the City
- Demand for larger format retailing options
- Market responds to price discounting
- Motor vehicles will remain the primary means of transport
- Nature of product will determine distance people are willing to travel for it
- Napier cannot control the pattern and form of retailing in Hastings
- Increased use of technology over time
- Continued regional dependence on agribusiness/commodities

Key Uncertainties

Key uncertainties are those key factors which are inherently uncertain and which will determine the nature of Napier retail in a significant way:

Most critical to future outcomes:

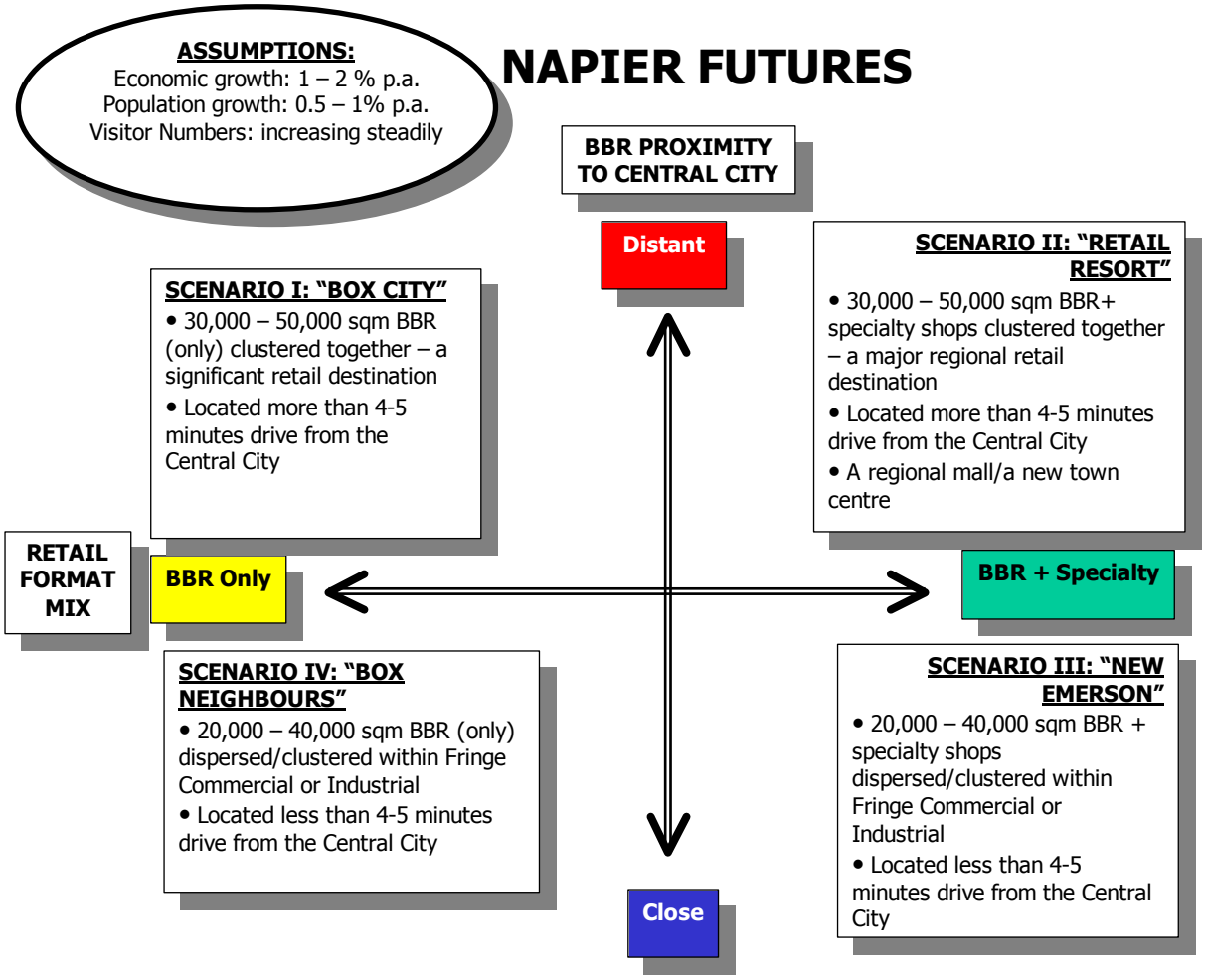
- [1] Impact of (BBR) on Inner City
- [2] Whether large retailers will remain in the Central City
- [3] Extent of demand for BBR
- [4] Location of BBR
- [5] Whether Hawkes Bay can sustain a large greenfield option.

Less critical to future outcomes:

- Impact of technology on retailing (eg. internet)
- Use/activities in Central City in future
- Level and composition of migration to region
- Health of nation's economy
- Composition of local government
- Impact of Napier-Hastings expressway
- Perceived level of safety in Central City

Scenario descriptions

Four scenarios for the future have been constructed. All scenarios are equally likely if there are no policy changes as a result of this study. The scenarios all have a 5-10 year time horizon. The scenario assumptions are shown below:



NOTE: The 4-5 minutes definition is a construct for analytic purposes only and refers to the approximate drive time from the intersection of Emerson and Dalton Streets.

So how do we use them?

- ❑ There is no preferred scenario
- ❑ The scenarios will in any event have significantly different effects
- ❑ The scenarios are not strategic options

The Scenario analysis process considers the potential elements which could be affected:

- Retail Structure:
  - Central City
  - Foot Traffic
  - Specialty
  - Existing BBR
  - Suburban shopping Centres
  - Fringe Commercial
  - Shopping Patterns
  - Product categories
- Central City
  - Vitality
  - City living: population
  - Leisure and recreation
  - Investment
  - Rating Value
  - Social Infrastructure
- Urban Fabric
  - Streetscape
  - Heritage
  - Scale
  - Ease of movement
  - Open Space qualities
  - Safety
- Land use/dislocation
- Traffic
  - Traffic arrivals
  - Traffic volumes
  - Traffic connectivity
  - Traffic Access and infrastructure
  - Car parking
- Population/location
  - Suburban living
  - City living
- Tourism/visitors
- Employment
  - City
  - Suburban
- Regulatory instruments

The charts which follow summarise the likely effects on Napier under each of the four possible scenarios. These effects assume no policy changes, and are meant to guide thinking on the recommended policy options.

SCENARIO I:

"Box City"

Retail Structure
- Moderate effects on foot traffic
- Some retailers will relocate and move out of the inner city
- Forces people into their cars
- Frees up sites on fringes

Inner City
- No impact on leisure/recreation
- Potential decline in vitality
- Negative-drawing some investment elsewhere
- No impact on city living

Tourism
- Unlikely to have effects
- Could pull regional visitors

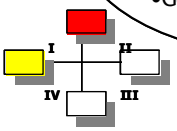
Social Infrastructure Investment
- Little impact

Population/Employment
- Little effect, but curtailing future Inner city growth

Urban Fabric
- No effect on Art Deco Quarter
- Often out of scale buildings
- No contribution to safe environment
- Car prioritized streetscape
- No public open spaces

Traffic
- Customers vehicle orientated
- Rising traffic volumes 18k vpd
- Needs major intersection provisions
- Significant land for car parks 3.3ha
- Good regional connections
- Poor distribution

Land Use/Dislocation
Potential migration of existing retail from fringe



SCENARIO II: "Retail Resort"

Retail Structure
- Significant effects on foot traffic
- Relocation of retail specialty
- Significant effects on product categories
- Forces people into their cars

Tourism
- Dilute inner city visitors
- Could pull regional visitors

Inner City
- Potential decline in vitality
- Negative impact on leisure/recreation
- No impact on city living
- Negative-drawing investment away
- Decline in rating value

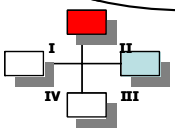
Population/Employment
- Major negative impact on small and medium size retailers in city/ Suburbs
- Attract population away from central city

Social Infrastructure Investment
- Major impact on attractiveness of inner city

Traffic
- Customers vehicle orientated
- Rising traffic volumes 22k vpd
- Needs major intersection provisions
- Significant land areas for car parks 5.5ha
- Good connection to regional roading network

Urban Fabric
- Positive scale of buildings
- Commercial public open spaces
- More vacant inner city buildings (Art Deco)
- Car prioritized streetscape

Land Use/Dislocation
Potential migration of existing retail



SCENARIO III:

" New Emerson"

Retail Structure
•Significant effects on foot traffic
•Relocation of specialty retail
•Significant effects on shopping patterns
•Foot and vehicle traffic

Inner City
• Short term decline in vitality
• Negative impact on leisure/recreation
• Negative impact on city living
• Very negative - drawing investment away

Tourism
•Depending on location: could compete with inner city

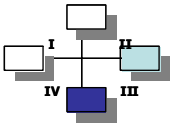
Population/Employment
•Major negative impact on inner city and suburbs

Infrastructure Investment Social
• Little impact

Traffic
•Increased foot traffic
•Rising traffic volumes 20k vpd
•Inner city intersection need upgrading
•Significant land areas for car parks 4.2ha
•Disconnected from regional roading network

Urban fabric
•More vacant inner city buildings (Art Deco)
•Commercial public open spaces
•Pedestrian prioritized streetscape
• Positive scale of buildings

Land Use/Dislocation
•Shift in land use
•Negative change of land values
•Weak regulatory framework



SCENARIO IV: "Box Neighbours"

Retail Structure
•Little effect on foot traffic
•Relocation of retail limited
•Strengthening inner city shopping pattern
•Moderate effect on product categories
•Foot and vehicle traffic

Tourism
•No impact

Inner City
• Little effect on vitality
• Little impact on leisure/recreation
• Positive investment

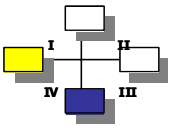
Population/Employment
•Employment growth in inner city
•Little effect in suburbs

Infrastructure Investment Social
•Strengthening of inner city

Traffic
•Increased foot traffic
•Rising traffic volumes 15k vpd
•Inner city intersections need upgrading
•Significant land areas for car parks 3ha
•Disconnected from regional roading network

Urban fabric
•Significant impact on scale and bulk of buildings in the inner city
•Little effect on Art Deco Quarter
•No open public spaces
•No contribution to safe environment
•Car prioritized streetscape

Land Use/Dislocation
•Little effect
•Weak regulatory framework



6 Options

This study does not attempt to choose a scenario. It is also important to be aware that, in the absence of new strategies, all scenarios are equally possible.

Accordingly a strategic approach needs to be able to cope with all of the possible scenarios.

Three broad strategic options in response to the possible scenarios for the future are:

- **Option 1**: "do nothing" or laissez faire – the status quo.
- **Option 2**: enable the development of a substantial retail node away from the Central City.
- **Option 3**: enable large scale retail development to locate as close as possible to the Inner City.

In the context of the Options and the Recommended Strategy, "close" refers to the outer limit of the Fringe Commercial zone as per the Proposed District Plan.

The "do nothing" option is not a realistic option because of the potentially significant adverse effects on the Inner City if development were to occur in an unmanaged manner. It is important that any new retail development contribute to the vitality of the Inner City.

The next option of "location away from the Central City" is also not a desirable option because this too would undermine the vitality of the Inner City. Fundamentally this option opens up the possibility of a competing retail "destination"(s) of a substantial scale, whether it is BBR or specialty dominated, or both. This development option should be discouraged until all possible options closer to the Inner City have been exhausted.

The recommended strategic direction is to encourage integrated development close to the Inner City, so as to maximize the opportunities for cross-shopping and strengthen the vibrancy of the Central City.

TABLE – Benefits and Cost Analysis of Options

Development Option	Benefit	Cost
Option 1: Do nothing or laissez faire	❑ Will allow flexibility for larger format retail ❑ Won't put pressure on Fringe Commercial Zone	❑ Puts Inner City vibrancy at risk ❑ Provides no clear direction ❑ Disperses new investment away from Central City ❑ Will disperse employment away from city centre ❑ May require investment in additional traffic measures while capacity in Central City will be under utilized
Option 2: Enable substantial retail node development away from Central City	❑ May allow utilisation of under-utilised resources and won't put pressure on Fringe Commercial Zone ❑ Could create a regional destination ❑ Less pressure on parking in Central City	❑ Lose Central City vibrancy ❑ Adverse effects on Central City investment and employment ❑ Will require investment in additional traffic measures, with significant investment in certain areas ❑ Competes with Hastings retail investment ❑ May use scarce industrial land resource ❑ May lead to reverse sensitivity issues
Option 3: Enable BBR to locate as close as possible to Central City	❑ Consolidates retail focus on Central City ❑ Utilisation of under-utilised space through aggregation of sites ❑ Reinforces the Central City as the premium destination by enabling cross-shopping	❑ Sound traffic measure investment required ❑ Risk of land not being made available ❑ Risk of developer frustration

The recommended option is to develop a suite of methods, both district plan – related and other methods, to facilitate achievement of the strategic direction, specifically encouraging development of retail close to the Inner City.

7 Strategic Direction

We recommend adoption of the following strategic intent:

- Enable the establishment of activities which contribute to a vibrant and economically viable City
- Provide a suite of non-regulatory methods to achieve a robust and vibrant Central City.
- Provide positive incentives for retailing activity which sustains the Art Deco resource of the Central City
- Provide planning measures to manage the future pattern of retail development so that it enables the sustainable use and development of the physical and cultural resources of Napier.
- Ensure that appropriate land resources are available for the full range of land uses requirements of the city, including residential and industrial activities.
- Ensure that the roading network of the City is not compromised by poorly located large-scale retail developments
- Ensure that BBR meets the full infrastructure costs of locating on the periphery of the City.

The key principles of the strategic direction are:

- It is concluded that it is neither feasible nor desirable to attempt to prevent the expansion of BBR in Napier.
- Enabling large format retail to locate as close as possible to the Central City.
- Ensuring maximum connectivity and possible integration between new retail development and the Central City.
- The enhancement of the Central City shopping and retail experience.
- Encouraging more people to live in the Central City.
- Minimising the potential adverse traffic and parking effects associated with future development in the Central City.

Factors that would encourage BBR to locate near the Inner City:

General factors:

- Clustering a variety of retail, leisure and services in close proximity to the Inner City – being and remaining the major retail destination and attraction in the region
- Cross-shopping – i.e. ease of pedestrian movement from larger format retail to and from the Inner City
- Making it viable for larger format retail to accumulate large enough properties to satisfy their needs
- Making parking provision simpler for the operators but effective for the user
- Ease of access and circulation for cars and other modes of transport – opening up the key routes
- Breaking down the barriers to the Central City - providing easily legible routes connecting to the surrounding suburbs
- Make legible 'entry' points to the Central City
- Making it less attractive to go elsewhere in the city
- Dispersed approach and departure routes that enable customers to arrive and depart from a number of directions
- Potential for multi-trip visits by people who are already visiting the Central City
- Shorter travel times for most customers
- Shared use of the substantial area of carparking could facilitate further or improved development in the Central City

Retail-specific factors:

All retailers:

- Availability of parking
- Proximity to like-minded retailers, including competition: increases comparative shopping – physical and perceptual connections
- Availability of right size ("envelope" or "footprint") sites
- Affordable rentals, security of tenure
- Reasonable lease provisions
- Close to customers, or attractive destination for customers
- Precinct image that is consistent with their image
- Evidence of market growth
- Balance of local authority controls:
    - flexibility with regard to:
        - opening hours
        - sidewalk trading at promo periods
        - signage
        - external appearance
        - traffic controls
        - health controls
    - control of street traders

Specialty retailers:

- Availability of smaller footprint sites (typically less than 500 sqm)
- Good footcount/traffic, similar to mall or good high street
- Moderate level of competition, facilitates comparative shopping
- Locating in an existing "destination"
- Non-national retailers: training and marketing support

Larger format (BBR) retailers:

- Larger footprint sites (typically greater than 500 sqm)
- Easy access for vehicle traffic
- Moderate level of competition
- Lower rentals (per sqm) than in high street/mall environments
- Mixed use with specialty retailers – creating a "destination"

Key Categories of Methods

We have identified the following sets of methods to achieve the strategic direction. These include a range of management techniques, urban design elements and incentives.

- Retail-specific incentives
- Mixed use incentives
- Co-location incentives
- Aggregation incentives
- Traffic and parking management
- Land use management
- Central City support/rejuvenation incentives
- Urban Design Elements

These methods can be selectively applied to different parts of the City to achieve the strategic direction.

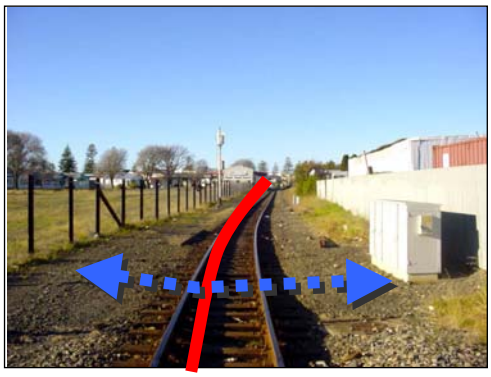
The range and combination of methods used will differ from one part of the city to the other. These are targeted at two broad objectives:

- Ensuring a strong and vibrant Central City that sustains its potential as the commercial heart of Napier.
- Avoiding the potential adverse effects of large scale retail development outside of the Central City.

Within the Central City

- Attract development of 'living' into the Central City through a combination of planning and design actions.
  - Reduced financial contributions for residential development
  - Reduce parking requirements for apartments/accommodation
  - Require minimum building setbacks
  - Relaxation of height requirements outside the Art Deco Quarter
  - Require acoustic control (noise insulation)between buildings
  - Locate bars (liquor licenses) where they will not heavily impact on living quarters
  - Improve lighting, footpaths and planting
  - Provide small playlots combined with seating for mothers/fathers
  - Provide small streetside squares

- Make access and circulation on foot and cycles as easy as possible
  - Make the pedestrian network highly legible



Railway: A physical and psychological barrier

- Ensure a well-connected network, guiding pedestrians and cyclists where they want to go and where they need to go.
- On key routes provide 'anchor' items to guide pedestrians and cyclists (banners, trees, paving patterns, etc).
- Provide pedestrian and biking signage to key destinations.
- Improve lighting – especially through alleys and parks.
- Provide seating at key places.
- Provide safe and amenable street and rail crossing points for pedestrians.
- Improve the quality of the footpath surface and provide clear cycling lanes.
- Provide key focus areas or plazas and meeting places.
- Make Emerson Street the most accessible and attractive hub – a great attraction.
- Improve urban design elements – eg. street furniture – revamp.
- Check Dickens Street design treatment.
- Run link bus down Dickens Street.
- Parking on Dickens St – Council.

- Promote clustering of activities to grow potential synergies and visual experience, including:
  - Recreation and leisure
  - Restaurants and café's
  - Larger format retail
  - Offices
  - Encourage residential mixed use with BBR retail and/or office use.

Entrance to CBD not visible from the beach

- Provide incentives for BBR to locate in Fringe Commercial Zone.
  - Set a minimum permitted floor area for new retail tenancies in the Fringe Commercial zone at 500 m^2, with some provision for existing businesses.
  - Allow development bonuses where BBR provides or contributes to public amenities, such as:
    - Public parking.
    - 24 hour security/lighting.
    - Public art/open space.

- Encourage aggregation of titles for BBR in Fringe Commercial Zone by:
  - Financial incentives (eg rating relief) when developer/retail aggregates titles within Fringe Commercial.
  - Waive consent processing fees for retail proposals in Fringe Commercial which aggregate titles.

- Provide development support for Inner City retailers, such as:
  - Improving stability and continued presence of key anchor retailers by catering to their specific needs
  - Training/Customer Service package for firms employing < 10 – perhaps a special rate.
  - Back-to-back investment commitments, eg. Quality systems, mystery shopper programmes – on a quid pro quo basis with small retailers.

- Integrate parking, public transport and traffic measures in Central City.
  - Provide incentives for shared use of parking by different activities (eg. BBR, accommodation etc)
  - Provide free minibus circuit via public parking areas, Inner City and BBR
  - Allow reduction in parking requirements for BBR in Fringe Commercial Zone.

- Develop other Inner City attractions as well as Art Deco

Clear street legibility of Kennedy Rd through avenue of palm trees

- ❑ Link Central City visually to key surrounding precincts – promote distinctive gateways
  - by car and
  - on foot

Outside Central City

- ☐ Provide good visual connections from adjacent precincts to Central Area.
- ☐ Ensure effective foot and car connections within Precincts.
- ☐ Make Precincts as attractive possible for their current activities and users.
- ☐ Consolidate retail and business areas in clearly defined and easily accessible areas outside of Industrial Zone.
- ☐ Build defining character themes into the public domain to assist in making the neighbourhoods more sustainable.
- ☐ Link Central City visually and tacitly to
  - Sea and beach
  - The hill
  - Promote distinctive gateways (take different modes of transport into account)
  - The surrounding precincts
  - Allow for significant uses and activities to support the network
  - Create feature parks at key junctures

Central City isolated by strong barriers and limited connections

- ☐ Manage BBR locating outside the Central City to avoid adverse effects. In the Industrial Zone:
  - Retail developments shall be provided for where:
    - Individual tenancies have a minimum floor area of 500m^2
    - And at least 75% of tenancies have a floor area of equal to or greater than 1,000m^2.
    - Café and /or lunch bar ancillary to, on the basis of a maximum of one such facility per 10,000m^2 of floor area.
  - Encourage BBR to locate on arterial roads with appropriate access arrangements.
  - Provide for appropriate parking.

9 Anticipated Outcomes

The anticipated outcomes from implementation of the strategy include:

- Consolidation of the Central City as the "commercial heart" of Napier.
- Through urban design measures ensure the continued and increased attractiveness of the Central City as a place to visit, live and work in.
- Building Art Deco into all future plans as an essential element of the character of the Inner City.
- Setting opportunities and controls to ensure that new development will not place unsustainable demands on the City's infrastructure.
- Ensuring that a wide range of activities continue to, and increasingly in the future find a home in the Central City.
- Integrate parking and public transport in the Inner City to ensure efficient use of available land.
- Ensure that there is sufficient land resource in the Industrial Zone for foreseeable future industrial needs.
- Ensure that reverse sensitivity issues do not discourage growth and development in the Industrial Zone.

Art Deco Quarter This zone identifies the concentration of art deco buildings that makes Napier unique. It includes all of Emerson Street and the significant building in the south end of Hastings Street.

Big Box Retail ("BBR") Large footprint retail shops usually on one level with associated parking. Generally part of a national chain with a strong brand image, focussing on a limited product range, price, advertising with heavy discounting. Often promoted as destination shopping.

Central City The commercial core of Napier including the Inner City Commercial Zone, the Art Deco Quarter and the Fringe Commercial Zone as defined in the City of Napier Proposed District Plan.

Inner City Includes the Inner City Commercial Zone and the Art Deco Quarter as defined in the City of Napier Proposed District Plan.

Inner City Commercial Zone The Inner City Commercial Zone surrounds the Art Deco Quarter. It extends as far as Station Street to the south and Browning Street to the north. It is the retail area of the inner city but does not include the concentration of the art deco building based around Emerson and Tennyson Streets.

Fringe Commercial Zone The Fringe Commercial Zone surrounds the inner city retailing core. It extends as far as Faraday Street to the west, Sale Street to the south and includes the former railway yards. It is characterised by larger scale commercial activities such as supermarkets and furniture showrooms. This area is easier to access by heavy vehicles than the core retail area.

Specialty Retailing Often small and medium-sized shops, but can include larger Department Stores such as Farmers. Usually characterised by high levels of personal service, and wider product ranges for a wide range of products, eg. clothing, personal items and household accessories. Typically smaller than 500 sqm in size.

Square Metres This term refers to retail space measured as per the Gross Floor Area (GFA) definition of the Property Owners Council.

Suburban Commercial Zone The Suburban Commercial Zone covers all of the shopping centres outside of the Inner City area such as Taradale, Marewa, Tamatea etc.