# TIMARU CITYTOWN
# CURRENT STATE REPORT

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# CITYTOWN GEOGRAPHY AND DEMOGRAPHIC INFORMATION

For the purpose of the Current State report the Timaru City Centre/CityTown boundary is the same as the Timaru Central census area. It covers some 30 or so city blocks, approximately 0.8 sq.km of land, between Grey Road to the west and the Port to the east. It is 'bookended' by Browne Street to the south and Sefton Street/Port Loop Road (SH78) to the north. The area covered broadly reflects a 10 minute (800 metre) 'walkshed' from Strathallan Corner. The Bay Hill and Caroline Bay are not part of the Timaru Central area, but are however included in the CityTown study area.

The city centre includes approximately 140 shops[1] and is home to an estimated 430 residents (405 at the 2018 Census) which represents 1.5% of urban Timaru's population of 27,650 people (in 11,880 households), a proportion of the overall population size comparable to many New Zealand regional centres. Urban Timaru's population is forecast to grow modestly through the 2020's before slightly shrinking to 27,550 (12,200 households) by 2048. Timaru District has a resident population of 48,400 people, 5,511 businesses and 26,004 employees.

The median age of city centre residents is 37.4 years, lower than that for Timaru District which is 44.8 years. Overall, Timaru District's population is ageing, with almost one-fifth of people aged 65 or over with this ratio set to increase to 1:3 people by 2035. This has significant consequences in terms of future population growth (to remain broadly static being reliant on modest inward migration), household demands, employment growth and service provision.

At 5%, unemployment amongst city centre residents is higher than the District (2.5%) and nationally (4%). Data indicates that the city centre is more ethnically diverse than the wider Timaru District with a strong presence of first-generation Asian immigrants. Around 77% of city centre residents are of European descent (compared with 90% in all Timaru District), 13% identify as Māori (9% in all TD), 8% are Pacifica (2 in all TD), 10% are Asian (4% in all NP). Over 20% of city centre residents were born overseas compared with 13% of residents from in the District.

[1] Future data capture could include number of businesses and number of workers employed, along with updates to number of shops

# CURRENT STATE
# HOW TIMARU IS PERFORMING

The CityTown Tactical Masterplan is to be framed around a 'stock take' or assessment of how the city centre is currently performing against a series of attributes seen in successful regional city centres across New Zealand and around the world.

This assessment, alongside engagement feedback, has helped identify the key challenges and opportunities of the city centre and the goals that should be pursued for the Masterplan to achieve its vision as defined in the Timaru CityTown Strategic Framework. The content of this Current State Report has informed the Strategic Framework.

The assessment reviews the current performance of Timaru CityTown against seven attributes of forward thinking, inclusive cities that put people first. These attributes can be aligned with Timaru District's Community Wellbeing Outcomes as set out in the Long-Term Plan (2021-31) and added into brackets below:

1. Accessibility (Connected Citizens/Resilient Infrastructure/Enhanced Lifestyle)
2. Affordability (Enhanced Lifestyle/Diverse Economy)
3. Amenity (Enhanced Lifestyle/Resilient Infrastructure)
4. Community Attitude (Connected Citizens)
5. Cultural Distinctiveness (Connected Citizens)
6. Economic vitality (Diverse Economy)
7. Environmental responsibility (Sustainable Environment)

# ATTRIBUTE 1
# ACCESSIBILITY

**CITY CENTRES THAT ARE EASY TO GET AROUND AND HAVE GOOD STRATEGIC CONNECTIONS TO THE WIDER CONURBATION, REGION AND WORLD (OFFSETTING ANY LOCATIONAL DISADVANTAGES.**

## Intra and Inter-Regional Connectivity

Regional connectivity to Timaru can be considered mildly poor relative to other South Island regional centres.

The state highway network connects directly into the centre via SH1 to the Port with a drive time by car to Christchurch (and Christchurch Airport) of roughly 2hrs (2½ hours by inter-city coach) and 2½ hours to Dunedin. The Richard Pearse Airport (Timaru Airport) is located 12km north of Timaru or a 15-minute drive from the CityTown provide daily 1¼hour flights between Timaru and Wellington and onward destinations. The airport plays a key role in bringing leisure and business visitors into the district, with flights operating at high load factors and the terminal is frequently at capacity. There are active plans to invest in an extended runway and expanded terminal and there are also opportunities for additional freight and industrial uses across the airport site.

Connectivity to New Zealand's second and third largest cities is therefore reasonable for 'out of town' business and tourist trips although not as good as from other South Island regional hubs such as Dunedin, Queenstown, Blenheim and Nelson (typically 1 hour flight times or less, and connections to multiple domestic destinations).

Timaru no longer has a passenger rail service although the South Island Main Trunk line through the city centre is still used by freight trains serving the Port and the odd tourist train.

PrimePort is an important piece of infrastructure for the District, offering cargo and marine services, including facilities for cruise ships. Cargo services include those relating to the shipping and storage of bulk goods and bulk liquids, such as fertiliser, stock feeds, cement, fuel and chemicals, all of which are key inputs to the local economy.

Looking at telecommunications infrastructure, Census 2018 suggests that internet and telecommunications access is slightly lower than national averages, with 81.7 percent of Timaru District households having internet access compared to 86.1 percent across New Zealand.

## Getting Around the City

Timaru is generally easy to get around. Notwithstanding the fact that the city centre lies on the eastern flank of urban Timaru the drive time from all parts is 10 minutes or less, or within a comfortable 15-20 min cycle ride. As evidenced in the 2021 CityTown Residents Perception Survey the majority of respondents were happy with their ability to access the city centre quickly, easily and safely (87% by car).

Despite the relatively gentle topography of the city centre (except for the level change to the historic landing area) its walkability is severely hampered by the relatively impermeable block structure (urban blocks typically being more than 100m long/deep) particularly south of George Street and the presence of the car dominated barrier of SH1[2] on the western edge and SH78 'off ramp' to the north. Consequently, whilst the 5-minute (400m) 'walkshed' from Strathallan Corner is relatively comfortable the 10-minute (800m) walkshed to the city fringe residential hinterland to the west and south is more challenging (due to the SH's and relatively low grade and fragmented commercial areas to the south).

[2] Future data capture note- a useful reference would be number of vehicles / hr at peak time.

This compromised 10-minute walkshed has implications for the overall vitality of the city centre with a diminished critical mass of city centre fringe residents to support services. Furthermore, the SH78 Port Loop Road creates compromised level of connectivity to the city centres greatest natural asset, Caroline Bay. This is also reflected in the mode of movement around the city centre with the 2021 CityTown Perception Survey suggesting that 64% cross city centre trips were by car and only 34% walking, 1% bicycle and 1% public transport. Perhaps more encouragingly, a large proportion of respondents indicated that they would prefer to get around on foot.

According to Stats NZ in 2018 3,522 people travelled into Timaru Central for work of which 88% drove or where a passenger in a private vehicle, 7% walked, 3% cycled and 1% used the bus. Timaru Central's 237 resident workers mostly worked in the area (48%) with some 75 residents 'commuting' to other Timaru locations, primarily the Timaru East Port area (17%) and Washdyke employment area (17%).

58% of Central Timaru resident workers travel to work by a private vehicle, 24% walk, 3% cycle, 2% take the bus and 12% work from home.

The low levels of cycling to and within the city centre is likely to be due to a range of reasons including the ageing population, only partially complete infrastructure and perceived traffic safety issues, lack of end-of-trip facilities (ie showers, changing rooms, secure bike parking etc). On the flip side the climate and topography make Timaru relatively cycle friendly, even if perception of the gradients by locals could be different.

Pedestrian counts undertaken by Timaru District Council in early 2022 across multiple locations concentrated on Stafford Street, suggest that pedestrian volumes are highest at the north end of Stafford Street between Church Street and Canon Street. This appears to be consistent with anecdotal evidence that residents tend to park in the Farmers carpark or at the library and walk through the shops or along Church Street. High footfall at the Bay Hill area appears to be confined to hospitality and the piazza, and limited crossings of SH78 Port Loop Road. Pedestrian counts dwindle at the south end of Stafford Street. This data gathered via pole mounted counter readings, and observation count survey also suggests that the majority of pedestrians are adults and senior citizens (av. >75% combined), with negligible cyclists (average <1%).

## Car Parking

There are 1,071 public car parking spaces available in the Timaru town centre. 520 of those are located off-street and 551 located on-street.[3]

Sixty-five percent of the respondents in to the 2021 perception survey commented that there is an adequate supply of car parking, whereas 28% of respondents stated they would like to see more parking. Some respondents stated they expected to be able to park directly next to their destination. As the pedestrian survey showed that most respondents had driven to the town (69%), it is important that an adequate level of car parking is provided to accommodate this.

The Timaru Parking Study 2021 identifies 4,668 parking spaces within the study area of which 31% are on-street parking and 69% are off-street. Weekday occupancy rates for on-street public parking are 74-80% unrestricted, 23-63% restricted, off-street public parking 21-53%, and off-street private parking (38-49%) across the city centre generally pointing to an overprovision of spaces. Occupancy also varies by sector—being higher in the north and lower in the south, and across times of the day. Off-street public carparks are poorly utilised but show a high level of variation throughout the day. The highest peak occupancy rate is on-street retail parking at the north end of Stafford Street (83%)

Carparking in the city centre is a contested topic with retailers, shoppers and commuters. Gaining a balance between convenience, supporting business, and creating a people-oriented city centre is important. To revitalise the city centre, existing parking needs to be better managed, and consideration given to potential alternative uses of off-street and on-street carparks (whilst maintaining provision at above current occupancy levels).

## Bus Services

Timaru was served by the Timaru Link Bus which, starting and finishing at Station Street, running on a radial loop (clockwise and anticlockwise) connecting all key parts of the city with a typical frequency of every 20 minutes (alternate directions). The Link Bus service was fully decommissioned in 2020 and replaced with MyWay, the on-

[3] Future data capture note- it would be useful to know the number of private parking spaces and whether they cater to workers/ customers

demand bus service, the sole public transport option managed by Environment Canterbury. This on-demand service is growing in popularity and now transports between 500 and 600 passengers daily on weekdays, exceeding patronage of the previous traditional bus service. MyWay does not currently service Timaru airport, which is only accessible by private vehicle or taxi. However, the cost of a taxi is a deterrent for many people.

There is only one taxi service operating in Timaru (Timaru Taxis) with taxi stands located on each side of Church Street.

### Universal Design & Accessibility

The city centre needs to be accessible to all, which means ensuring that streets and buildings follow a universal design approach that recognises the diversity of needs at different life stages e.g. pregnancy, childhood, injury, disability and old age. In 2018, 7.8% of the Timaru population (9% in the city centre) were recorded as having one or more activity limitations, slightly above the national average. In real terms improved accessibility might include things like expanding the width of paths for people and strategically locating mobility parking, as well as ensuring all facilities and amenities are accessible for prams, wheelchairs and mobility scooters.

### Accessibility Summary

- Inter-regional connections are limited principally to SH1, regular flights from the airport to Wellington and rail links for port freight only. Timaru's connectivity to Christchurch and Wellington could be regarded as sufficient for occasional travel but beyond realistic daily commute times (in 2015 the average time spent commuting weekly in Canterbury was 4.2 hours).
- The level of public transport patronage has historically been relatively low with by far the predominant mode of accessing the city centre being private vehicles reflecting the ease of access and parking. The MyWay bus service provides flexibility and innovation in the public transport network and seems reasonably popular, although there is a question over how it might be upscaled if patronage were to increase beyond current capacity.
- There appears to be some inefficiencies with carparking in the city centre that could be addressed through better carparking management.
- Direct and safe pedestrian access into the city is hindered by the state highway network. Additionally, the city blocks are generally oversized, reducing pedestrian permeability which encourages cross city centre travel by car.
- Active modes of transport such as cycling and electric scooter feature poorly as a share of how people move through the city centre.

### Accessibility Case Study

Roeselare, Belgium is an example of town centre revitalisation, including smart parking to ensure more efficient use of parking spaces along key shopping streets.

https://www.propertyweek.com/features/the-belgian-city-showing-how-high-street-regeneration-should-be-done/5101748.article

# ATTRIBUTE 2
# AFFORDABILITY

**CITY CENTRE'S WHERE THE RELATIVE COST OF LIVING AND DOING BUSINESS IS BALANCED FAVOURABLY AGAINST INCOME LEVELS, ENABLING PEOPLE ACCESS TO HOUSING, INVESTMENT, ACTIVE PARTICIPATION, AND OPPORTUNITIES TO SUCCEED.**

The population of Timaru District is around 46,000 with urban Timaru having a population of 27,650. Population growth over the next decade is forecast to be relatively modest 6% (whereas households are forecast to grow by 10%) before levelling off and contracting to today's size through the 2030's.

The Timaru City Centre (Central) population has been static for the past two decades hovering at around 400 people with 200 dwellings recorded (roughly 1% of Timaru District's housing stock). These dwellings tend to be houses on the city centre fringe to the west and south with only a small number of apartments.[4] Just 33% are owner occupied, indicating a dominance in the rental investment sector. Family homes in Timaru typically rent for $350-$450 per week, whereas the average rent within Central Timaru sits at $200 per week—illustrating the smallest

### Household Income

In 2021 the average annual household income in Timaru was $100k p.a, lower than the national average of $114k. However, the per capita income is $43k compared with $41 nationally reflecting the smaller average household size (2.29 person per dwelling rather than 2.45 for Canterbury or 2.58 for NZ) and suggesting a good overall living standard in relative terms. Furthermore, on the housing affordability index Timaru district performs extremely well at 4.3 as opposed to 7.8 nationally or 5.4 excluding Auckland (being the ratio of the average current house value to average household income). Similarly, on the rental affordability index Timaru District sits at 17.5% as opposed to the national average of 21.4% (comparing average weekly rents with average weekly household income).

### Housing Supply and Affordability

The significant recent national house price increases (30% increase year-on-year across the Canterbury region in 2021 brining the average house price to $690k) are not reflected to anything like the same degree in Timaru with only modest impact on the affordability of living in Timaru. Towards the end of 2021 the median house price in urban Timaru was sitting at $450,000 (up 10% on the previous year) making it one of the most affordable urban locations in NZ. Anecdotally however, this positive result needs to be nuanced as housing stock is ageing and often presenting poor quality and/or poor conditions, and would require further investment to be extensively retrofitted.

Timaru's housing market is typically stable without the highs and lows other parts of the country experience. This steady picture can be seen as a positive in terms of safeguarding affordable living and potentially acting as a pull factor to incomers seeking a lifestyle change. On the negative, it does mean that there is less impetus for residential living options within the city centre which would be helpful in terms of increasing vitality, business viability and adaptive reuse of earthquake prone heritage buildings.

A recent study on residential capacity (based on the OPD and PDP provisions) across the district found that, under the OPD, some 2,974 dwellings of Timaru's almost 27,000 dwelling capacity would likely be realised under the ODP. This estimate increases by almost 29% under the PDP to 3,168.

In terms Timaru City Centre (Central) the study notes significant difference between theoretical capacity and realisable capacity, with only 3% realisable under both the OPD the PDP (assuming duplex, town houses and apartment typologies and taking account of the min 35sqm outdoor space requirements).

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[4] Future data capture note- it would be useful to know the number of apartments in the urban centre, and track increase over time.

| Timaru Central | Theoretical Capacity | Realisable Apartments | Realisable House | Realisable Terrace | Total Realisable Capacity | Realisation Rate |
|---|---|---|---|---|---|---|
| ODP | 9751 | - | 75 | 259 | 334 | 3% |
| PDP | 5374 | - | 135 | 2 | 137 | 3% |

Although permitted in the OPD Commercial Zones, residential activity in the town centre has been relatively limited. There may be many factors that contribute to the low level of city centre living, but the main reasons are thought to be:

- There is an older demographic of people in Timaru who are more inclined to live in the suburbs.
- Due to the relatively low cost of housing in Timaru, young people can afford to buy a house with land.
- The requirement for one car parking space per unit in the Commercial 1A Zone and two car parking spaces per unit in the other Commercial Zones may limit the amount of household units being accommodated in the existing buildings which tend to occupy the entire ground area.
- There are no design guidelines for apartments, townhouses or duplexes in the town centre, the absence of which do not encourage such uses.
- The city centre lacks the amenities to support residential, such as medical centres, metro market, play or recreational areas etc
- There is no active promotion or incentives city centre living or lifestyles.

It should be expected that the predominant housing type within the OPD Commercial Zone (PDP City Centre/Mixed Use Zones) should be apartments however they are currently considered to be only marginally viable. Although apartments may be built in Timaru in the future, on average, given the existing underlying land values and the costs of construction, they are struggling to generate the necessary profit margins to make them viable for developers.

An enabling planning policy is critical to supporting residential development in the city centre. To this end, some refinement of the PDP may be required as the current drafting has the following implications:

- Terraced typology options are removed from the City Centre zone in the PDP due to the ground floor retail requirement.
- In the PDP Mixed Use Zone new residential development is a Restricted Discretionary Activity, a status that can act as a disincentive to bringing forward proposals.

Making city centre living an attractive development proposition and lifestyle choice has to be a foundation stone for the CityTown Masterplan creating a critical mass of resident population to sustain services and occupy space released from the shrinking footprint of non-residential uses e.g. retail. This requires the public and private sector to deliver affordable housing options and tackle amenity and accessibility issues that may currently be impeding the realisation and acceptance of city centre living.

Anecdotal evidence from Venture Timaru (via recruitment agencies and employers) suggests that while employment opportunities are attracting workers, the lack of housing diversity is acting as a deterrent, i.e. anything other than old houses on large sections. In addition, anecdotal evidence via workshops suggests that retirees/ rural downsizers have signalled a desire to move to the city if accessible terrace housing or apartments were to become available. [5]

Public housing is proposed on the city centre periphery, with Kāinga Ora announcing in May 2022 the planned delivery of 40 houses on the Grey Rd site purchased for $3.95m – which includes the sportsfield adjacent to Ara in close proximity to SH1. While this is the largest public housing project confirmed in South Canterbury in the last 50 years, the latest figures suggest this is still not enough- with 117 applicants waiting for social housing as of March 2022.

[5] Future data capture note- determine how many workers could take up jobs if housing needs could be met via data from emplyers/ recruitment .

With these matters in mind, it is suggested that further consideration is given to how residential development can be encouraged in the town centre.

## Doing Business

Setting up and running a business in central Timaru is considered affordable, as illustrated by the many independent small businesses that exist. Retail rental values in Timaru currently sit at around $250 per sqm/per annum (mainstreet/ north of George Street), which is significantly lower than other New Zealand towns. This suggests good affordability for new retail enterprises. Price by negotiation and discounted rental rates are becoming more common to ensure a tenant, with rental values varying according to location on Stafford Street- north or south, sunny side or shady side.

Timaru's Growth Management Strategy 2045 places considerable emphasis on consolidating business activities with the city centre whilst also promoting business intensification in the Port and Washdyke Industrial

areas. There is currently considered to be a slight oversupply of commercial office space with availability on Beswick Street and in the old Post Office. There is considered to be lots of capacity in the upper floors of existing buildings[6] and few buildings are fully tenanted. Shared commercial space also has some vacancy- suggesting floor areas may be in excess of requirement for small businesses / professional services. A modest amount of new commercial office space development is occurring including, for example, the recently consented 1,000sqm two storey building at 24 Latter Street. There are several largeish offices but mostly occupied by professional service firms, and there is a new office share development recently opened on Church Street, just before the roundabout.

The 2015 retail vacancy rate was 12% or 17 stores (according to the Property Economics retail assessment) out of a total of 125 stores. By comparison, a count of vacant premises by the CityTown project team in early 2022 revealed in excess of 20 ground floor vacancies along the mainstreet (27 by address), suggesting a worsening vacancy rate of approximately 20%, and a high number of secondhand shops at the declining south end of the mainstreet. An additional 11 vacancies were counted on side streets between Stafford Street and the Port. Turnover is slow- anecdotal evidence from landlords suggests retail tenancies can sit on the market for up to 2 or 3 years. The future opening of the Showgrounds development will create additional competition with the city centre, presenting a risk to worsen the vacancy situation of not managed properly.

Some recorded vacancies such as the CML building, DC Turnbull, Theatre Royal and Majestic Theatre are reliant on seismic strengthening and consenting for anticipated development.

The first tranche of Earthquake Prone Building (EPB) notices served by Timaru District Council is in the order of 180 buildings on strategic routes within the CBD, with a low first contact response rate from building owners of under 40% as of early 2022. There is likely to be a direct correlation between low value recent sales on the mainstreet, and the perceived cost of seismic strengthening requirements with a likely trend toward more investor owners, rather than owner-occupier or local ownership. A lack of investment in maintenance is evident for some buildings, along with some absentee landlords. The demise of secondary finance providers (such as South Canterbury Finance) has also impacted on the financial viability of developments, with Bank loan alternatives requiring up to 60% deposit.

## Affordability Summary

Residential housing demand is subdued (relative to many parts of New Zealand) with low population growth/inward migration and consequently access to housing and overall affordability remains good, although lacking quality and diversity to respond to the diverse needs of the population (including ageing demographics). Additionally, a good supply of cheap business space creates favourable conditions for business start-ups although this may be undermining demand for new, higher-quality space required for businesses to move on into as they develop and to attract larger corporate office tenants. Striking a better balance of housing and commercial employment space in the city centre is critical to its future vibrancy and success.

Covid-19 has seen a rise in the popularity of living in smaller cities. Leveraging this additional demand, Timaru city centre must offer affordable, intergenerational and higher density housing options (apartments but perhaps more particularly town houses) to secure a diverse resident population of scale.

[6] Future data capture note- estimate the amount of sqm floor area available in the upper floors of existing buildings to determine capacity.

# ATTRIBUTE 3
# AMENITY

**CITY CENTRE'S THAT OFFER GOOD LOCAL SERVICES (SHOPS, COMMUNITY INFRASTRUCTURE, LEISURE ACTIVITIES ETC), HAVE A QUALITY PUBLIC REALM THAT SUPPORTS PUBLIC LIFE AND ARE CLOSE TO BEAUTIFUL NATURAL ENVIRONMENTS AND RECREATIONAL OPPORTUNITIES.**

### Natural Environment Advantages

The natural amenity that surrounds Timaru and its city centre is special with South Canterbury foothill range to the east and the diverse coastland to the west providing a backdrop to everyday life and creating countless recreational opportunities. Timaru's proximity to these natural assets and the notion of 'mountain to sea' is known to be one of things people like most about the region.

Within the city centre this association to the water is most evident at Caroline Bay which also provides the most significant area of green public open space within the city centre. Consequently, it has become a focus for the community as a place to gather, play and relax. It is also renowned for significant destination events, and is home to the annual Caroline Bay Carnival, run for 100 years by the Caroline Bay Association.

Away from Caroline Bay however, the relationship between sea and city is largely non-existent with the Port area largely off limits to the public beyond the Main South Train Line / SH78 (Port Loop Road). With increased Port reclamation and accretion of Caroline Bay, the result is an increase in recreational space that is largely underutilised, and undesirable walking distances to the water – leading to reliance on car parking along Marine Parade and within Caroline Bay. Port infrastructure such as wharves, jetties and ramps previously providing public access to the water for boating and recreational fishing have aged and become unsafe, with plans to remove them and replace with new infrastructure.

Recreational trails are plentiful along the coast and waterway, providing good access to natural environments, but these trails are not well connected to the city. A fairly recent migration of blue penguins has become an attraction along marine parade, with opportunities to both protect their habitat and improve accessibility to the beach and viewing areas.

### Public Realm, Open Space & Streets

The city centre's public realm, public spaces and streets are of variable quality. Stafford Street acts as the city centre spine and has considerable streetscape quality being lined by numerous heritage buildings.Pavement materials used along Stafford Street area, predominantly red engineer bricks now appear dated and have known slip issues, especially when wet.

As mentioned above, Caroline Bay is a considerable green asset to the city centre to be further enhanced as a leisure destination through the CPlay investment, and the renewal of the soundshell bleachers set to host significant events once Covid restrictions are lifted. However, Caroline Bay represents almost the full extent of green space present in the city centre and is severed from the core city centre by the Port Loop Road (SH78). In this context there can be considered to be a deficit of green open space available to workers, residents and visitors.

Formal civic space is also limited in the city centre with the most notable, highest valued space, being Strathallan Corner. This space is seen to offer a retreat in the city but lacks engagement with the street due to the unsightly toilet and the walled water feature – designed to protect users from the State Highway before it was moved to a by-pass. Heritage Place (adjacent to Te Ana Māori rock art centre) is utilised for the successful and expanding Artisan Farmers Market, made lively by activation and the Speights Ale House courtyard.

Other small green open spaces are disconnected and remnants of the street pattern - corners occupied by monuments and memorials but less convenient or attractive for people to access and inhabit, such as Seafarers corner. Collectively these green spaces do have visual amenity value with large trees framing the CBD, including the grounds of churches and civic buildings. The library garden is sometimes used for storytelling.

Most pockets of civic space are susceptible to strong easterly winds, including the Piazza at Bay Hill. While the Piazza offers outstanding views of Caroline Bay, it is inaccessible for many people with the lift frequently out of action. Courtyards and laneways offer significant potential for sheltered human-scale spaces but are underutilised and mostly private. The Royal Arcade has lost its former destination pull with the Post Office and outdoor dining activities under the covered structure are restricted due to fire regulation and warrants of compliance of the individual buildings composing the Arcade.

The TDC Parks Strategy 2012 to 2022 is due for a refresh, along with the Public Art and Play strategies. It identifies a comparatively low provision of park land for the wider district, but a comparatively high provision of Premier Parks (Caroline Bay and the Botanic Gardens) for the size of the city. It identifies that the best option for urban areas to enhance the natural environment are ecological linkages that provide for habitat values, walking and biking for which there is growing demand.

### Community & Leisure

The city centre performs well in basic terms as community hub for the district and beyond with a reasonably full retail and leisure offer (noting some areas of the deficiency and therefore leakage discussed under Economic Vitality). Community buildings and services are concentrated within the city centre with the library being the key destination offering a full programme of activities and outreach services to the community. However, there is a distinct lack of bookable or 'drop-in' community gathering or creative space beyond the library, the Caroline Bay community hall and Community House.

Significant Investment is locked in through the Long-Term Plan 2021- 2031 for the Aigantighe Art Gallery Redevelopment ($9.9m 2023/24), the Aorangi Park and Stadium development in ($23.4m 2024-26). The $23m refurbishment of the Theatre Royal and Heritage Hub at the south end of Stafford Street is well underway and expected to open in early 2024. It will absorb the museum and become an art and culture destination for locals and visitors. This is likely to attract and leverage other commercial investment- potentially a Food Heritage Hub. It is understood the existing museum site will become redundant.

As mentioned above there is current investment in the Caroline Bay Soundshell bleachers ($1.8m approx.) and CPlay ($2.2m approx.). Previous significant investment in community and leisure includes the Caroline Bay Trust Aoraki Centre (Aquatic Complex) that opened in 2012, and the Redevelopment Plan for Caroline Bay completed in 2010 including the beach promenade, dune boardwalk and WW1 memorial.

The Caroline Bay Management Plan 2014 is due for a refresh, which includes a review of commercial activity. TDC has historically called for expressions of Interest (EOI) for a cafe to be sited near the carpark adjacent to Marine Parade, with the possibility of Bike and Kayak hire and plans to renew this call-to-action in. Recent power supply upgrades have enabled this, but the significant impact of COVID on the hospitality industry has slowed the process. Other commercial ventures have also been proposed to boost tourism and visitation, leveraging the destination appeal of Caroline Bay voted as one of the top 10 beaches in the country. However, there is a vast array of ad-hoc recreational activity and underutilised infrastructure in Caroline Bay that requires some rationalisation, consolidation and repurposing. There is a risk that the addition of more dispersed infrastructure without careful masterplanning will detract from its appeal.

### Amenity Summary

The natural environment and associated recreation opportunities of Caroline Bay is both a drawcard and source of satisfaction and pride for residents. However, improvements are required to the public realm/open space offer it is to become an attractive destination for those visiting and considering investing in the place. The city centre must evolve as a community and service hub catering for the needs of its residents (with the city centre and wider District) and businesses. Strong amenity and connected green space will enable growth and residential density, along with community gathering space.

### Amenity Case Study

Melbourne, Australia – Melbourne is a city with a visionary, consistent and sustained approach to the design and investment in their city centre. Previously dubbed the 'Melbourne Donut' - a place with nothing in the middle, they first used a 1994 Public Life Survey obtain benchmark data that has enabled them to inform and measure progress over time.
https://gehlpeople.com/projects/melbourne-australia/

# ATTRIBUTE 4
# COMMUNITY ATTITUDE

**CITY CENTRE'S WITH A STRONG IDENTITY, WELCOMING COMMUNITIES DRIVEN BY A COMMON PURPOSE AND HIGH LEVELS OF ACTIVE PARTICIPATION. MEMORABLE AND DISTINCTIVE CITY CENTRES ARE OFTEN DEFINED BY THE SPIRIT AND ATTITUDE OF THEIR PEOPLE, PARTICULARLY A DESIRE TO CELEBRATE AND SHARE WHAT IS SPECIAL.**

## Local attitude and pride

Timaru is known for its understated, no-nonsense attitude shaped by its past role as an industrial centre processing products from South Canterbury farms. The 2021 Annual Economic profile indicates a continuing strength in Primary Industries and Goods Producing Industries which have a greater share of GDP than the rest of the country. Growing, extracting, harvesting, processing, and manufacturing are the backbone of the Timaru District- anchoring the identity of Timaru to land and sea through agriculture and fishing, food and textiles, represented in the CBD by the active Port. The trade and apprenticeship courses offered at ARA suggest a practical and proactive approach supported by ITO's.

Timaru is a community of makers and do-ers. The relative isolation leads to an industrious attitude, independence and self- reliance. Timaru has its own hospital and airport. It has strong employment rates and a high proportion of essential workers. There is an appetite for entrepreneurialism and self-employment. Venture Timaru promote stories about what people value through their campaign 'We Love Timaru'. People love the lifestyle and celebrate their successes.

People are generous and support each other, with a genuine desire to help people succeed in life and share prosperity. Community support services are united and collaborative. Church communities are strong, the hospitality industry works together, Community House houses 25 'not for profit' community organisations with shared facilities and offers a broad range of support services for all ages and disabilities. YMCA promote diversity and inclusion, AMPSS101 provide mental health peer support within the CBD, and there is a new Multicultural Hub in Sofia Street providing services to newcomers, migrants and refugees. This does not however annihilate issues with intolerant attitudes in the community (including racism, sexism, misogyny, homophobia etc.).

Timaru creative community is generally dispersed and isolated, however there are a number of artists, musicians and creatives living in the Timaru District. Drama, theatre and performing arts have particularly strong community participation, and this is representative of self-reliance in the form of locally generated entertainment. The refurbished Theatre Royal will likely be home to the South Canterbury Drama League and Junior Drama league, and Aiden Theatre are located in Beswick Street. Local musicians currently perform at Strathallan Corner for Saturday Night Live, coordinated by the CBD group with TDC Covid-recovery funding. An artists collective of approximately 10 artists occupy an upper storey of the Tekapo Building on Stafford Street.

The community actively plan and participate in annual events such as the Carnival, Rock n Hop, Matariki, Masters games along with a wide range of fairs, markets, festivals, and sporting events all actively and widely promoted by Venture Timaru and the CBD Group. However, there is a low rate of participation in everyday urban life- particularly after hours and on weekends.

Broadly speaking, Timaru people are active and love the outdoors. Sport South Canterbury's Active Recreation is in a growing and expanding space and encourages participation in club sport and/ or social and recreational sport for all ages. Clubs are typically family affairs, and spectator participation is high. The region has produced a number of elite champions over the years who are openly celebrated. However there are ongoing challenges, particularly drop off in youth participation and significant issues around accessing volunteers for coaching and administration (the same as elsewhere in the country). The Spaces and Places Plan notes significant issues with over supply for – for example – golf and tennis clubs that don't have sufficient numbers to maintain their facilities but are resistant to rationalisation. All of the sports clubs are also feeling the pinch from COVID with major funders/sponsors less able to contribute and Trust Aoraki – which gets its monetary contributions from gaming machines – having taken a massive loss in revenue and therefore ability to fund. In general there is a perception that in Timaru, people value what they have but still desire improvement or at least a return to the vibrancy recalled from the 'hey-day' of the city centre when the streets were heaving with people. There is an inherent tension between the desire for change, and resistance to change that could be disruptive to everyday activity and entrenched behaviours, or disadvantage an ageing community with mobility challenges

Te Rūnanga o Arowhenua as mana whenua do not have a visible participation and presence in the city centre. This is distinctly lacking, but reliant on relationship building and partnering to achieve ambitious city shaping and regeneration goals for the future. There is some hesitation from parts of the community who are lacking the confidence, knowledge or desire to engage with te ao māori perspectives.

### Coming Home

Returning Timaruvians can play an important role in energising the community. These returners are looking for particular qualities, such as lifestyle, affordability and support for raising a family, and possibly starting a new business enterprise. Gaining experience outside of Timaru is a 'rite of passage' valued by young people between the ages of approx. 18 to 35. This age group tend to travel, work and study in the country's larger cities or abroad. Those who have returned bring new ideas, skills and expertise with them. Venture Timaru have used some of these stories in their 'We Love Timaru' campaign.[7]

### Stakeholder Capitalism

City centre businesses have expressed the desire to be better heard in conversations around improving business prospects within the city centre. Suggestions have included collective efforts to market, advertise, share ideas and manage communications within the city centre (for retailers, events, council projects etc). Stronger bonds and networks within the city centre would benefit business, particularly smaller, local businesses who may take a longer-term view of their role in the city, as opposed to absentee investors of larger retail multiples.

### Community Attitude Summary

A strong sense of identity and self-belief that is seen favourably by outsiders gives Timaru an edge when it comes to business, services and goods.

### Community Attitude Case Study

Porto, Portugal – Number one on Monocle's best small cities of 2021, the city has an industrious craft, artisan and manufacturing history. Its citizens are known for their hard-working, matter-of-fact attitude. The city is the country's business heart. The spirit of its citizens, along with good leadership, good regional access/connections and strong sense of community sets the city of Porto apart from others.

https://visitporto.travel/en-GB/porto-is-monocles-choice-for-living#/

https://monocle.com/magazine/the-forecast/2021/bright-lights-small-city/

[7] Future data capture note- determine numbers of returning Timaruvians in this age bracket, particularly in the urban centre (survey).

# ATTRIBUTE 5
# CULTURAL DISTINCTIVENESS

**THE CITY CENTRE HAS A STRONG SENSE OF IDENTITY CLOSELY ASSOCIATED WITH ITS NATURAL SETTING AND ATTITUDE OF ITS PEOPLE. THESE ARE CELEBRATED ASPECTS THAT PROVIDE A DEPTH AND RICHNESS OF EXPERIENCE, ACTING AS A DRAW FOR VISITORS AND INVESTMENT.**

## Landscape Identity

As Timaru city centre changes, it needs to retain its distinctiveness to avoid becoming an 'anywhere' place offering standard, mainstream businesses, buildings, retail and cultural identity. A link to productive agricultural landscapes and fishing is desired through a food heritage experience for locals and visitors that connects land and sea. However, to be viable it would need to evolve into a 'value over volume' offering drawing producers and consumers into a closer relationship with each other, along with authentic storytelling and reinterpretation of mahinga kai through businesses supported by mana whenua.

While primary industries are celebrated as a source of abundance, they are also by nature extractive. This South Canterbury landscape of braided rivers was once a giant wetland, a rich and abundant habitat for wildlife. Rivers emptied into coastal lagoons. The geology of Timaru contributes to its name meaning 'a place of shelter'- referencing ti-kouka (cabbage trees) as well as the natural 'hooked' reef and safe harbour interrupting the long smooth coastline. The reef was formed by the Mt Horrible lava flow, which gives the city centre its unique topography, street pattern, and bluestone cut for buildings in the city. The stream gullies formed low points providing access from the sea- where Strathallan Street and George Street are now located.

The city centre is inextricably linked to its wider landscape with the coastline, heavily reshaped by Port reclamation, to the east and the prominent South Canterbury foothill range to the west. Its identity and culture are further defined by the history of its indigenous people, Kāi Tahu iwi and te Rūnanga o Arowhenua, and its growth in the late 19th century as an industrial port town.

The defining natural feature of the city centre is Caroline Bay, to its northern most extent, which owes its current state to the construction of the artificial harbour. Overtime currents created a sandy beach under the cliffs which spurred in the early 20th century a period in which Timaru was promoted as a European- style beach resort complete with tea rooms, a hot water swimming pool and band rotunda and later a piazza from the top of Bay Hill.

## Cultural Identity

The overarching narrative of mahinga kai speaks to the 'unfulfilled potential, and potential to be regained' for Papatipu Rūnanga. From the earliest times Timaru was known as a place of shelter and a port of call for Māori canoes moving up and down the coast from Otakou to Banks Peninsula. Kaika and seasonal migration are captured in the temporary rock art of the region- displayed at Te Ana in the CBD. Significant changes to the coastline starting with construction of the breakwater, changed the areas of kaimoana and reduced the lagoons- degrading natural ecosystems, water quality and biodiversity supporting mahinga kai.

The foundations of the city centre in terms of its relationship with Māori over centuries have been largely obscured by more recent changes brought about by Pākehā settlement (first as a whaling station) and subsequent urbanisation. The original city centre shoreline, and associations as a resting place for waka, is now almost indistinguishable (other than the level change) but through interpretation does offer the opportunity for heightening the cultural and landscape identity of the place.

Timaru has a thriving arts scene. Just outside the city centre is the Aigantighe Art Gallery, established in 1956 and occupying an Edwardian mansion on Wai-iti Road, is home to an extensive permanent collection of New Zealand and international art. Within the city centre there are a number of art galleries including the not-for-profit Gallery 329 set up by a creative arts collective as a one-stop creative hub for local artists and crafters to sell their work. This strong arts community may well present an opportunity for city centre diversification.

There are a number of public art sculptures across the city centre and specifically Caroline Bay, eight pieces thanks to the Heartland Sculpture Challenge 2010, with a recognised and publicised arts trail. In addition, Timaru has a street (wall) art project guided by Timaru Civic Trust and Alive Vibrant Timaru which is further animating street scenes. However, it could also be said that there is currently in this public art limited expression of the city centre's indigenous cultural heritage.

The city centre has a number of cultural attractions including the South Canterbury Museum and Te Ana Maori Rock Art Centre. These facilities showcase the culture of the city through art and other exhibits, perhaps more significant in the long-term is the Theatre Royal redevelopment which, including a new exhibition area, atrium museum alongside performance space, has the potential to significantly elevate arts, culture and heritage within the city centre. If executed correctly could act as the catalyst for new creative enterprises and revitalisation of the south end of Stafford Street.

Opportunities to express Māori values, place names and story-telling to reconcile the impact of colonisation on the landscape and secure a greater living presence of Tangata Whenua are paramount to the city centre's cultural future.

### Built Heritage

Relatively modest urban change since the 1950s has ensured that Timaru city centre has a well-preserved early 20th century main street (Stafford Street) and other notable historic buildings. There is a visual richness in the city centre's built environment with many fine buildings from the Victorian/Edwardian period. After the 'great fire' in 1868 which destroyed 39 wooden buildings on Stafford Street, only brick and stone could be used to rebuild- resulting in the unique and consistent architecture and materiality seen today.

Within the Timaru Commercial 1 Zones there are thirty heritage buildings identified by the District Plan and with four featuring on New Zealand Heritage's Category 1 list of places of special or outstanding historical significance (St Mary's Anglican Church, Gladstone Board of Works Building, Custom House and Landing Services Building).

Although not all of the buildings along Stafford Street are listed heritage buildings, many buildings still exhibit some Victorian and Edwardian character and combined with the listed heritage buildings, provide (with some exceptions) a continuity of heritage facades. This gives Stafford Street a strong historic character. These buildings tell a story of the towns past and make a significant contribution to the character and amenity of the city centre.

However, a number of significant buildings have been demolished or substantially modified over the years. There is an increased threat to the remaining heritage buildings brought on by the cost of earthquake prone building strengthening requirements together with the at the time prohibitive cost of incorporating the additional modifications for health and safety (ie fire safety) and universal access now required under the Building Act 2004.

The heritage buildings of the city centre are a significant asset which contribute to the unique identity of Timaru. If capitalised upon, they could create economic benefits. For instance, the Landing Services Building, saved from demolition in the 1980's, has been restored and is currently operating as a successful bar, restaurant and function centre, and also houses the iSite and the Te Ana Māori Rock Art Centre. This has been a productive reuse of a previously underutilised building.

### Cultural Distinctiveness Summary

- Greater recognition of cultural heritage prior to Pakeha settlement, along with contemporary Māori culture would add richness to the built and social environment of the city centre. There is opportunity in the marketing of the city to better include Mana Whenua culture and visibility.
- The bourgeoning arts community has the potential to become a significant drawcard with the prospective of growing creative enterprise in the city centre.
- Potential of the Theatre Royal redevelopment to act as a catalyst for creative activities in the city centre.
- Retaining, enhancing, and celebrating Timaru's historic built heritage is an opportunity to provide economic stimulus to the city centre but has significant funding and viability implications.
- The diversity of the local community including Pasifica, Asian, Rainbow etc. is not currently visible or celebrated in the city

## Cultural Distinctiveness Case Study

Itoshima, Japan – A city of about 100,000 people with spectacular access to both nature and urban life that offers excellent quality of life. Itoshima has a strong agricultural, seafood and produce economy, with many young farmers and small businesses thriving. There is a strong sense of community and citizens are open to outsiders, helping to attract creative minds and new businesses. City investment in promoting Itoshima's craft lures people to visit and relocate.

https://monocle.com/magazine/the-forecast/2021/bright-lights-small-city/

# ATTRIBUTE 6
# ECONOMIC VITALITY

**CITY CENTRE'S THAT ARE FOCUSED ON SUSTAINABLE ECONOMIC GROWTH, PROVIDE FOR DIVERSE EMPLOYMENT OPPORTUNITIES, SUPPORT INNOVATION AND ENTREPRENEURIALISM, AND ULTIMATELY ENABLE A GREAT WORK/LIFE BALANCE.**

## The Role of the City Centre

The critical mass of workers in the city centre (as comparative to the wider District) contributes significantly to its economic vitality and public life[8].

The city centre needs to further encourage new activities that broaden its economic base and create a more successful and resilient location. Its retail, commercial office and tourism sectors are all facing 'headwinds' and cannot be relied upon to fully underpin the city's success into the future.

## City Centre Retail

Including the Heaton Street LFR stores (15 stores) the city centre has some 140 or so retail shops (totalling 38,000 sqm GFA city centre/ 15,409 sqm GFA Heaton Street). This represents over 70% of all urban Timaru's stores (170 stores totalling 74,000 sqm GFA) and nearly 50% of the wider Timaru District's retail provision (277 stores, 100,000 sqm GFA). As such, it captures a significant proportion of the near $500m of retail spend generated per annum in Timaru district.

76% of Timaru District resident spend is in Timaru with Christchurch being the main point of out flow or leakage at 8% suggesting 'shopping trips' to the closest large city (possibly its suburban malls) are popular. Some 20% of spend in Clothing, Footwear and Personal Accessories and Furniture Retailing by Timaru residents is spent in Christchurch indicating residents are not satisfied with the Timaru offer. The current level of leakage from Timaru district is 24% or $112m.

Conversely and coincidentally, a noteworthy 24% of retail spend in Timaru District comes from outside the district i.e. $1 in every $4 spent. 65% of the external expenditure comes from the Canterbury region indicating Timaru attracts a small local visitor market. As a consequence, the retail spend leaving this district is offset by that coming into the District representing a net neutral retail expenditure flow position although certain sectors such as clothing are not offset (20% - mainly in the fashion sector - 'leaks' out of the region specifically to Christchurch).

At present, a substantial number (about 90%) of the city centre's (excluding Heaton Street) retail stores are smaller, speciality retail (below 500sqm) that are crucial to the city centre's future. The city centre including Heaton Street also includes a significant proportion of Timaru's large format retail (LFR) such as supermarkets, comparison goods shops and department stores. Out of town options like Washkdyke or the future Showgrounds development on Evans Road however dilute that offer and present direct competition with the centre.

In terms of existing retail supply versus current and forecasted GFA demand the picture differs between specialty retail and LFR. There is currently an oversupply of LFR retail space relative to demand which was forecasted to close over the next decade however the Showgrounds development will likely retain this oversupply although if this is in the furniture sector it will help stem retail leakage.

There is nominally an approximate equilibrium in small store supply to demand currently albeit the quality is seemingly not meeting expectations leading to over half of all fashion spending being made outside the district. By the start of the next decade, it is forecasted that there will be a shortfall in speciality retail supply by up to 10,000 sqm GFA. Improving the quality of this form of provision, potentially by redeveloping/refurbishing 'other stores' will help

[8] Future data capture note: Determine how mant businesses are in the city centre and how many people they employ , providing the % of all Timaru's workers that are based in the city centre.

retain locally generated spend and act as an attractant to in flow spend. The enable this shift the PDP and CityTown Masterplan needs to provide investment certainty that fuel reinvestment confidence in the existing built stock alongside initiatives to support the growth in independent retail business sector.

In 2015 vacancy rates in the City Centre (excluding Heaton Street) sat at 17 stores (12%) or 2,704 sqm GFA all along Stafford Street (mainly the south end). A recent observational count revealed that 38 buildings appeared vacant. This vacancy rate is high relative to many similar sized city centres and is likely to come under further pressure as a result of challenges on the horizon including:

- Potential reductions in household discretionary retail and leisure expenditure linked to increased housing costs and general inflation;
- Dissipation in retail activity within Timaru with movement into the Showgrounds area compounded by the re-emergence of Christchurch as a retail destination of choice;
- Changing retail consumer expectations, including a desire for experience-based retail leisure activities;
- The growth in online retail, which accounts for 10% of NZ's retail spend and is estimated to grow to 20%;
- Catering to the specific retail requirements of the resident population (e.g. fresh food outlets) and responding to the Covid induced preference to shop local.

There is a need to 'look after' existing retail in the city centre area, resisting out of centre LFR development and continually evolving more interesting, diverse and multifunctional offerings.

### City Centre Commercial

The city centre's commercial (office) sector is relatively modest and is not forecast to grow.[9]

A new institutional anchor in the city centre would make a substantial direct and indirect (via its supply chain) contribution driving office space demand as well as general footfall.

As well as responding to Timaru specific trends in the commercial sector, the CityTown masterplan needs to be cognisant of general trends, such as the rise of remote/home-based working and a preference for communal open-plan office and co-working spaces. The Covid pandemic accelerated these trends, with the overall effect likely to be a decrease in the footprint of the commercial sector, further highlighting the need to channel other types of activity into the city centre.

### Tourism and Hospitality

Though relatively small when compared to the Timaru District's overall economy, the tourism sector, and the visitor economy more broadly, plays an important role across the district, providing amenity, leisure activities and experiences to visitors and residents alike.

Across the district, the tourism sector directly employs over 1,500 people and indirectly supports employment and expenditure in many other sectors. The sector directly accounts for 6 percent of all filled jobs in the Timaru District.

In 2018, over 1.8 million people visited the district of which 91% were domestic in origin and 77% were day visitors (one of the highest proportions of day visitation in the entire South Island). According to MBIE's monthly regional tourism estimates for the year ending October 2019, visitors to the Timaru District spent $226 million. Beyond this, as stated in the Timaru District Management Plan (Venture Timaru, 2021), tourism matters to the Timaru District for several other reasons:

- tourism often provides an entry point to the labour market for many workers, particularly young people, and teaches valuable soft skills such as customer care.
- visitor spending underwrites the amenity of the district, supporting local bars, restaurants and cafés and can support investment in new infrastructure which also brings benefits to residents.
- a vibrant visitor economy helps to create a positive perception of the district and can support wider objectives such as population growth and talent attraction.

[9] Future data capture note- more information on commercial sector – i.e. number of people employed in the city centre's core commercial sector

While most visitors to the district are day visitors, overnight visitors still provide an important contribution to the local economy. In 2019, there were a total of 305,341 commercial accommodation nights in the Timaru District. A key area where the Timaru District compares unfavourably to surrounding areas, or national averages, is length of stay. In 2019, the average length of stay for visitors to the district was 1.7 days compared to 1.99 days nationally.

As highlighted in the South Island Destination Management Plan, compared to other South Island destinations, the Timaru District has a lower number of visitor attractions than most other locations. The audit of tourism attractions and services contained in the South Island Destination Management Plan identified just 25 attractions within the district - one of the lowest levels of visitor attractions in the South Island. In addition, most attractions in the district also tend to be free activities (52 percent of all attractions), with a heavy emphasis on outdoor, nature-based activities that are non-commissionable/ do not attract visitor expenditure.

### Broadening the Economic Base

The City Centre Strategy must support activities that drive enterprise, entrepreneurialism, and innovation. This will require new and improved networks, modern spaces to encourage knowledge transfer and collaboration, and a radical change in the perception of Timaru as place to set up in business.

The service sector (particularly food and hospitality) will play a fundamental role in Timaru's future success and should not be overlooked. It is vitally important to develop the skills and capacity needed to support the economy and enhance local job opportunities.

The Port of Timaru has recently been selected as the building site for the new Scott Base Antarctica research base. According to RNZ this is expected to generate more than 700 jobs over the next six years (170 at peak construction) with the intention to primarily rely on the local workforce. This represents a significant economic injection into the Timaru economy that might draw some additional residents to the district and potentially the city centre e.g. construction specialists, at least in the short term. Opportunities to leverage the project as a point of interest for visitors should be explored.

The presence of a strong tertiary education provider is an important foundation stone to supporting economic diversification and growth in the city centre. In this context, the Ara Institute of Canterbury with its Timaru campus just outside the city centre is an important player. There is an opportunity for focused enterprise support and training in some of Ara's key specialisms such business, art and design, and food, hospitality, and tourism.

### Economic Vitality Summary

Timaru retail demand remains positive[10] although, as reflected in shop vacancy levels, the city centre is likely to transition with a reduction in the overall retail footprint. It can be expected that some larger footprint national stores will leave/relocate with emphasis needing to shift to finer grain independent business. At the same time, commercial office space demand is low and the hospitality offer is constrained by a skills/labour shortage, inability to prolong visitor stays and the relatively modest spend of an aging resident population. In this context, the overall vitality of the city centre is under threat with the risk of significant underutilisation and underinvestment in the existing building stock which in turn risks business confidence.

The city centre needs to function as the main employment and community hub, providing a diverse range of work opportunities to satisfy the district's existing population and attract new talent, specifically footloose workers seeking a lifestyle shift. Business establishment and growth (specifically independent businesses) must be underpinned by the availability of a full range of adaptable retail, maker and office spaces, as well as enterprise support and training. Backfilling of some vacated city centre space with residential uses would seem to be critical to the overall strategy.

### Economic Vitality Case Study

[10] Future data capture note- update 2015 numbers for retail demand.

Newcastle, NSW, Australia – The second largest metropolitan area in NSW, Newcastle, which has its roots in coal mining experienced economic decline in the 1990s following the closure some key steelworks. Current revitalisation is focused on the economy, with investment of over $650 million proposed to transform the city centre. Plans include strengthening connections between the city and waterfront, creating job opportunities, providing new housing, and delivering attractive public spaces connected to better public transport.

https://www.hccdc.nsw.gov.au/revitalising-newcastle

# ATTRIBUTE 7
# ENVIRONMENTAL RESPONSIBILITY

**A CITY CENTRE THAT DEMONSTRATES ENVIRONMENTAL RESPONSIBILITY AND STEWARDSHIP, TAKING ACTION AGAINST GLOBAL CLIMATE CHANGE, BUILDING RESILIENCE TO NATURAL HAZARDS, IMPROVING LOCAL AIR AND WATER QUALITY, AND RESTORING ITS BIODIVERSITY AND ECOLOGICAL SYSTEMS (MAURI TU).**

Canterbury's (and Timaru District) prosperity has been built on the primary industries most notably its agricultural heritage however this has led to the region being a relatively high contributor to national greenhouse gas emissions (11% of the total).

A momentum shift appears to be taking place in terms of local action on environmental matters with, for example, Timaru District Council committing to developing a Climate Change Strategy and the establishment of the Sustainable South Canterbury Trust based in Timaru. At present however there is little evidence of this growing awareness leading to structural changes towards a low emissions economy or consideration of how the city centre might contribute.

The city centre is well positioned to adopt sustainable measures in terms of promoting the environmental performance of refurbished/new buildings, enabling active transport options, nurturing eco conscious local businesses and enhancement of green infrastructure centred on Caroline Bay. Additionally, the Scott Base construction could potentially spin off opportunities related to modular construction given the local knowledge attained, the investment in tooling and the supply chain established.

### Resilient & Adaptable

A sustainable city centre is resilient and adaptable to future climate conditions and natural hazards – safeguarding assets and 'de-risking' investment.

Earthquake prone buildings are a recognised challenge for the city centre, affecting 187 buildings on priority routes, reflecting its rich built heritage even though Timaru lies in the lowest earthquake risk zone (Zone 1). Current modest financial assistance is available through Timaru District Council's Heritage Protection Fund to support maintenance of the exterior of the heritage buildings and minor structural works, but full seismic upgrades remain out of reach for many building owners. A comprehensive strategy is required that, for example, promotes a shift towards new city centre uses, that generate higher values needed to support viability e.g. residential conversions potentially with gap financing.

Another focus for the city centre is its response to sea level rise and coastal erosion. It is known, for example, the Caroline Bay beach will grow (130m over the next 50 years) due to accumulation of sediment in essence moving the opportunity to engage with the water further away from the city centre. Conversely, The Port and the whole reclaimed area below the original shoreline (including Caroline Bay) is at risk of inundation on storm tides. This will have clear direct economic impacts and needs to be factored into current thinking including water sensitive design of the public realm and the design of new buildings in areas of risk.

### Environmental Responsibility Summary

The city centre needs to reflect a wider environmental commitment and spearhead the transition to a low emission economy. Its built environment must transition in a way that reduces greenhouse gas emissions, improves levels of energy efficiency and sustainable energy generation so that it becomes far greener and biodiversity-rich whilst offering greater protection against natural hazardous.

### Environmental Responsibility Case Study

Lahti, Finland - Lahti has industrial city roots. It previously had a somewhat gritty reputation but is now seeing its city centre being revamped. The city stopped using coal to power the city 2019 and is instead using recycled fuel and locally certified wood to heat the city. As a result, the city has reduced its carbon emissions by 600,000 tonnes/year. Lahti seeks to achieve carbon neutrality by 2025. They have already cut down their own greenhouse gas emissions by 70% compared to 1990 levels.

https://greenlahti.fi/en/facts

# CURRENT OPPORTUNITIES AND CHALLENGES

**THE CITY CENTRE IS A PLACE OF SIGNIFICANT OPPORTUNITY. THERE ARE ALSO SOME CHALLENGES THAT NEED TO BE ADDRESSED BEFORE IT CAN FULFIL ITS ROLE AS THE CITYTOWN FOR TIMARU DISTRICT.**

**THE OPPORTUNITIES AND CHALLENGES THAT UNDERPIN THE CITY CENTRE STRATEGY, SHAPED BY THE CURRENT STATE REVIEW, ARE SUMMARISED AS FOLLOWS.**

## OPPORTUNITIES

### Natural setting

Blessed by its natural setting between mountains and sea. Timaru has an opportunity to enhance its appeal as a leisure destination through the CPlay investment in Caroline Bay.

### Māori identity and emerging economy

Māori culture and identity are being increasingly celebrated in Timaru with iwi and hapū empowered in their customary kaitiaki role. Māori values must be integrated with centre planning and decision-making to unlock the social and commercial potential of iwi and hapū.

### Accessibility to immediate catchment and beyond

The centre is a comfortable 10-15 minute bike ride and bus or car journey from urban Timaru, with minimal congestion. The relatively gentle topography of the centre makes it a cycle friendly location.

### Sense of place

The character-laden built environment of the centre comprising many fine Victorian and Edwardian commercial, civic and industrial heritage buildings imbue a sense of place and quality which in turn has economic value. The relationship to the historic landing area remains evident as is the continued importance of Stafford Street and the commercial spine of the centre.

### Relative isolation

Timaru's relative geographic isolation can be considered a strength with limited retail 'leakage'. It holds a lifestyle appeal for those looking to leave the 'rat race'.

### Affordability

Timaru is a relatively affordable place to live and to establish business, both of which are positive for centre development. Independent shops and businesses are prevalent and have the potential to form the backbone of the centre's economy.

### A thriving arts and culture scene

Timaru punches above its weight when it comes to events which in turn drives a vibrant creative scene, an attractive attribute for those seeking a more artisan lifestyle.  It also has some appealing visitor attractions such as the Te Ana Maori Rock Art Centre which will be further bolstered by the Food Heritage Centre and refurbished Heritage Hub and Theatre Royal.

### New economic investment

Timaru has recently been selected as the building site for a new Scott Base Antarctica research base. Generating an estimated 700 jobs, this may draw additional residents and spend into the local economy.  Venture Timaru is well placed to leverage this and other inward investment.

## CHALLENGES

### An over-extended centre

The centre is 'over-extended'. The spread of activities and people over a relatively large area dilutes the centre's vitality.

### Walkability of the centre

State Highways 1 and 78 are key routes for suburban communities to access Caroline Bay and the centre by private vehicles, reducing walkability.

### Limitations in the public green space offer

Availability of green public open spaces is limited to Caroline Bay and a handful of small green spaces at intersections. The lack of public quality spaces, results in less vibrancy and makes the centre a less appealing place to live work and play.

### Retail under threat as a cornerstone centre activity

Online shopping, out of town developments and the resurgence of Christchurch as a retail destination may result in a dwindling retail offering in Timaru and more vacant shops.

### Absence of anchor institutions or drawcard destination

There are no significant institutions, economic hubs (other than the introverted Port) or attractions of scale (except C-Bay) that offer a year-round sense of activity to support future inner city living.

### Fragmented destination offering

The activity hubs and destinations are limited and scattered across the centre with poor quality connections between them. Visitor accommodation in the centre is also deemed poor.

### Static population growth and few people living in the centre

The population of urban Timaru is forecast to plateau in the next 25 years which will curb the economic growth prospects of the centre. 450 centre residents is insufficient to sustain services.

### Unproven centre residential market

The market for centre living, apartment/terrace housing is largely unproven and unlikely with values not supporting development viability on many sites.

### Earthquake prone buildings

A significant number of earthquake prone buildings within the centre are difficult to rent or costly to remediate to meet strengthening requirements. This impacts the viability of restoration.

### Over reliance on cars to access and move around

The convenience of car access, dispersed activity hubs and poor general walkability of the centre have led to an over reliance on private vehicles and low uptake of public transport and active modes of travel.

### Limited talent pool

An ageing population with younger people leaving to study and work elsewhere creates issues for local employers especially in hospitality, manufacturing and production.

# APPENDIX
# SWOT FROM KEY DOCUMENTS

| | STRENGTH | WEAKNESSES | OPPORTUNITIES | THREATS |
|---|---|---|---|---|
| **PLANNING AND GROWTH POLICY- 30 YEAR** | | | | |
| Timaru District 2045 - Growth Management Strategy | Defined urban limit are in place - limited urban expansion potential with preference (705 of new dwellings) for urban consolidation in strategic locations - greater density with higher amenity provided. | Historically little strategic direction on settlement form and density. | Household projections to 2048 identify that an additional 640 new households will be required across Timaru Districts urban areas | Districts elderly population (over 65 years of age) will increase from a ratio of 1:5 people in 2013 to 1:3 people by 2033. This impacts on rates and infrastructure funding. |
| | Timaru District contribution to the national economy - above average GDP growth over the past ten years | Housing affordability index of 5.37 equates to 'severely unaffordable when compared internationally (albeit favourable when looking at the national picture) | Consolidation approach - recognises Timaru City's functions and role as the primary business, retail, recreational, civic, and entertainment hub for the District | New residential dwellings tend to be at low density - of the 710 dwellings built in Timaru between 2005-15 only 5% where on sites of less than 300m2 (33 dpha NET) and 14% between 300 and 400m2. |
| | Sufficient commercial retail floorspace in Timaru city centre to meet demands until at least 2028 | Current oversupply of commercial (retail) space | | Threats to the vitality and viability of centres - modest projected population growth; increases in e-tailing; the extent of commercial land supply (including consented but not yet built developments); low productivities of existing retail floorspace; and meeting the associated costs of earthquake strengthening of commercial buildings. |
| | | | Commitment to work with tangata whenua at a governance, operational and economic dev level. | |

| | STRENGTH | WEAKNESSES | OPPORTUNITIES | THREATS |
|---|---|---|---|---|
| District Town Centres Study | unique quality of Timaru's built heritage (although the reluctance to invest in these properties is noted) | high shop vacancy rates - specifically on Stafford Street south of George Street which has limited footfall. Considered to be separated from main prime retail area to the north. Suggestion that relaxing zoning may assist. | encouraging the use of vacant buildings including the potential of pop-up temporary uses. | earthquake prone buildings |
| | Relatively recent influx of national retailers into the city centre and presence of anchor department store (although recognised that this could impact rental rates for independent retailers) | aging building stock with heritage building being 'demolished by neglect' and presence of lower quality stores | establishing a Town Centre Management Group (similar to the BID model) | out of centre retail development |
| | Ease of access and general compactness of the town centre e.g. main shopping area located between Canon Street and George Street (the core) | lack of activity in some areas and dispersed nature of activity hubs e.g. food and entertainment (night time activity) hubs at Bay Hill and around Stafford Street/George Street intersection or the fact that Countdown supermarket and Warehouse is disconnected from the town centre. | capturing the leakage in retail expenditure - specifically fashion | Town centre too spread out - Inability of the size of population in Timaru and district to support retail and service activities e.g. The DP Commercial 1A Zone runs for 1.3km north to south. |
| | | As at 2015 - lack of coordination and cooperation amongst town centre businesses and Council and lack of enabling funds. | General reconsideration of DP zoning -consolidating retail activities to a core area and clustering activities - shrinking of Commercial 1A Zone to exclude Stafford Street south which could be rezoned to promote retail supporting alternative uses e.g. residential. | Retail pull factor of a recovering Christchurch presenting new retail opportunities. |
| | | Perception of traffic congestion (attributed to poor pedestrian amenity) and lack of parking | Increasing overall street amenity and residential living potential including visitor accommodation (Bay Hill seen as area of particular opportunity) which will in turn lift vitality | Online shopping |

| | STRENGTH | WEAKNESSES | OPPORTUNITIES | THREATS |
|---|---|---|---|---|
| | | Lack of directional signage/ wayfinding | Using the PDP to enable sustainable development - e.g. min building heights, rezoning, design guidance for new development .... | Continued success of PrimePort will generate additional freight traffic potentially further severing the Bay Hill/piazza area and reducing any residential redevelopment appeal in the area |
| | | Shop opening hours e.g. typically 2pm on a Saturday and after hours activities limited with few people present. | Alternative access to the port which neither takes it through a prime strategic Timaru location nor reinforces the alienation of The Bay Hill precinct from the town's principal retail core | |
| | | | Initiatives to support investment/reuse of heritage buildings including increasing the existing Built Heritage Protection Fund or other grants | |
| | | | Potential of new people attracting activities e.g. Heritage Food Hub | |
| Timaru Retail Market Assessment | City Centre the largest and primary retail destination in the District - nearly 50% of overall provision | Relatively low income levels impacting spending power. | Substantial number (70%) of small specialty and boutique stores (<500 sqm) that represent future of city centre retail | Unactioned out of town retail consents (as at 2015) notably Evans Street/Showgrounds |
| | Older demographic with relatively strong spending power | Store vacancy levels across the District relatively high at 13% | Stemming current level of retail leakage (24%) worth $112m - recapture retail spending by providing retail stores, environment and amenity desired by residents within the Timaru market. | Leakage of general merchandising retail spend, particularly clothing and furniture, to Christchurch ($1 of every $5) |
| | Relative isolation/rural setting of Timaru ensures majority of retail spend is local ($500m pa) | High proportion of 'other stores' which tend to be low value damaging overall retail offer and rental values - bell weather of a declining centre. | As a 2015 there was an approximate equilibrium in supply/demand of specialty retail with the prospect of future demand outstripping supply (differential 10,000 sqm GFA by 2033)* | *Note. study's assumptions over future discretionary spend, online share, tourism spend etc. now questionable. |

| | STRENGTH | WEAKNESSES | OPPORTUNITIES | THREATS |
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| | As a 2015 there was an approximate equilibrium in supply/demand of specialty retail with the prospect of growth | As a 2015 there was a potential oversupply in LFR store types and the quality of the clothing (specialty retail) wasn't enough to stem leakage of spend. | Refurbishment/redevelopment of 'other stores' into more productive/efficient specialty retail - necessitating investment certainty via the PDP and City Hub Masterplan | Whilst LFR supply/demand is forecast to reach an equilibrium in the next decade this was prior to the Showground proposal. The risk is that oversupply leads to typically smaller store format retailed occupying larger foot print out of town tenancies. |
| | | Retail sales can't rely on population growth so there is a need to improve market share by offering quality of the experience. | | Ongoing Christchurch recovery process will create addition retail competition - Timaru needs to up its game accordingly. |
| CBD Summit Outcomes Report | | | CBD group for better collaboration | |
| | | | Collective Marketing and Promotion of the CBD as a destination etc.. | |
| | | | Poor wayfinding/signage – low awareness of what’s on offer | |
| | | | Creative solutions to traffic flow /underutilised car parks/heavy good vehicle movement | |
| | | | Active events programmme including occasional pedestrianisation and street markets | |
| | | | Retail strategy with council including street markets and initiatives to attract independent businesses | |
| | | | Review heritage strategy – shift beyond preservation | |
| | | | More inner city living | |
| | | | Improving retail mix | |
| **DESTINATION AND ECONOMIC- STRATEGY** | | | | |

| | STRENGTH | WEAKNESSES | OPPORTUNITIES | THREATS |
|---|---|---|---|---|
| **Timaru District Destination Management Plan** | Timaru visitor economy has fared better than many other locations across the South Island in the context of the Covid-19 pandemic - the districts visitor profile is more heavily weighted towards domestic visitors (80% compared with 59% nationally) | Length of visitor stay in the District is lower than the national average i.e.. 1.7 days compared to 1.99 days although urban Timaru is faring well with 5% increase 2019-21 | LTP 2021-31 projects and investments will heighten the visitor offer e.g. the Aigantighe Art Gallery redevelopment, Aorangi Park and Stadium development, Timaru City Hub (including public realm and event investments) and the CPlay project in Caroline Bay, | Lack of operator capabilities and ability to hire and retain skilled staff. |
| | The bias towards domestic visitors means that seasonality is less acute than other parts of the country. | Compared to other South Island destinations Timaru District has a lower number of visitor attractions (25 attractions or 1.9% share of South Island attractions) and they tend to be free nature based attractions. No real hero experiences | Potential hero projects including Te Ana Māori Rock Art and the Centre established by Ngai Tahu in the Landing Services Building; Caroline Bay; the city centres rich built heritage; and leveraging off the success of Geraldine as an international visitor destination. | |
| | Potential to grow overnight visitor stays (305,341 commercial visitor nights in 2019) | Most visitor accommodation is along SH1 and not in the city centre resulting it being bypassed - no high quality (4 star +) accommodation in the city centre. | Venture Timaru now operates as an integrated Economic Development Agency (EDA) and Regional Tourism Organisation (RTO) for the district. | |
| | | The heritage value of the city centre's building stock isn't exploited due to general underinvestment. | Attractive natural setting and rich culture heritage and primary industry experiences - on farm/food bowl etc....'slow tourism' | |
| | | Signage and wayfinding in the city centre is generally poor and there isn't much use of tangata whenua place names. | Capitalise upon the existing events programme and make sure the district is ‘event ready’ | |
| **Timaru District Economic Development Strategy** | Timaru District has a strong and diverse economy, benefiting from South Canterbury’s strong agricultural base | Slow population growth with declining natural growth - aging population with brain drain. | Economic potential of the Māori economy partnering with Te Rūnanga o Arowhenua | Perceived lack of choice and opportunities for workers leading to a challenge in retaining and attracting residents, particularly young people. |

| | STRENGTH | WEAKNESSES | OPPORTUNITIES | THREATS |
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| | GDP per capita higher than national average (when Auckland is excluded) | Employment and GDP growth is lower than the national average | The presence of Venture Timaru including its business support activities - business start-up and attraction - potential for tailored city centre response | Access to skilled workers and talent - population of the district continues to age and more people leave the district to study or work - impacts on hospitality sector which erodes offer/amenity |
| | Overall, the district's economy is fairly diversified and proven to be robust against the impacts of Covid | The Timaru District has lower qualification attainment rates at secondary and tertiary levels than seen nationally - and is falling. | Creating more highly skilled jobs across the district and encouraging existing businesses to invest more in research and development and innovation, to create higher value activities | Establishment of Te Pūkenga, the National Institute of Skills and Technology, and the implications of this for the Timaru campus of Ara Institute of Canterbury |
| | Housing is affordable (sale and rent) | Low skilled jobs make up the greatest proportion of jobs in the district (42 percent in 2020), | Leverage the district's quality of life offering and relative housing affordability as key assets to attract inward investment/migration - more reasons for young people and families to stay/return or locate | Vitality of Timaru Town centre under threat - not fulfilling its full potential. |
| | | External perceptions of the Timaru District - positives (lifestyle, housing affordability, Māori identity, natural environment etc.) not sufficiently promoted. | Creating a new narrative for Timaru | Note. seemingly limited understanding of employment space (commercial office and industry) requirements. |
| | | | LTP investment - specifically in Timaru City Centre - creating new business, employment and training opps. and unlocking private investment. Shift perceptions, create amenity and drive vibrancy - Theatre Royal, Heritage Hub and Food Heritage Centre. | |
| LONG TERM PLAN- 10 YEAR INVESTMENT | | | | |

| | STRENGTH | WEAKNESSES | OPPORTUNITIES | THREATS |
|---|---|---|---|---|
| Timaru Long Term Plan 2021-31 | | | Timaru City Hub - Option 2: Enable Change the look and feel of inner-city public spaces to improve inner city lifestyles, assisting with the creation of focal points and public gathering places around the George Street / Bay Hill area and at Strathallan Corner, and supporting the scaling up of existing events such as the Caroline Bay Carnival and Food Festivals to regional level events. The costs associated with the enabling option include $31.9 million debt funding over the period 2021-31 to undertake capital work programmes, additional operating costs of $15.2 million (in total) from 2022/23 (Year 2) to 2030/31 (Year 10), and a further $10 million of work undertaken in the period 2031-41. | |
| | | | Business Improvement District (BID) Policy | |
| | | | CPlay - A total $1 million Council contribution to the CPlay in Year One - 2021/22. | |
| | | | Event Funding - Venture Timaru allocation of a further $180,000 per annum from 2021/22 (total: $230,000). | |
| | | | Theatre Royal and Heritage Facility ($24.5m) / Aigantighe Art Gallergy ($2.7m) | |
| **Transport Strategy and research** | | | | |
| Timaru District Active Transport Strategy | Partial pedestrian and cycle network developed in Timaru | Relatively small amount of Council funding available for walking and cycling initiatives. | Tourism trail may lead to visitor demand/usage of active transport infrastructure | Ageing population resulting in more people with impaired mobility |
| | Strong advocacy and support groups and agencies | Poor driver behaviour including passing | Environmentally conscious community | |

| | STRENGTH | WEAKNESSES | OPPORTUNITIES | THREATS |
|---|---|---|---|---|
| | | cyclists too closely, driving too fast etc | | |
| | Generally wide road reserves allowing allocation of road space for walking and cycling. | Concern of safety and security by pedestrians in particular areas | Changing lifestyles – more flexible work hours, increased working from home... | |
| | Strong governance structure within Council | Gaps in existing walking and cycling infrastructure currently exist | People relocating into the district for the lifestyle who are likely to support active modes. | |
| | Climate and topography ideally suited to walking, cycling | | | |
| **RESEARCH/ CONTEXT STUDIES** | | | | |
| Timaru DC City Hub Residents' Perception Survey | character and identity: location of Timaru and Caroline's Bay beachside highly valued by residents | recreational and entertainment options mostly located in Caroline's Bay, detracting people from the TC. | Residents see the social function of the TC more important than commercial or cultural functions, opportunity to focus the MP on this aspect, | 52% respondents would like to see more parking provided by council |
| | 46% of respondents want to preserve historical buildings and facades as top priority for thing to preserve in the CC | | amenities and facilities catering for different age groups (teens?) and at different times of the day/week. Residents want to see more variety in shops/food and bev etc, | |
| | | | Streetscape improvements: better lighting to encourage people after dark and replace slippery pavements | |
| | | | 1/3 of respondents would support a car-free centre. Stafford st most mentioned area for pedestrianisation | |
| | | | more greenery: places to socialise and avoid the sun | |
| | | | public toilets better adapted for families and people with disabilities | |

| | STRENGTH | WEAKNESSES | OPPORTUNITIES | THREATS |
|---|---|---|---|---|
| | | | Great opportunities for mode shift - residents signalling a preferrence to access the city centre by PT, walking and cycling. Driving currently 87% could drop to 70% with appropriate infrastructure. Walk/jog could go from 5% to 35%. Same for movement within the CC, walking could double. Opportunities for micro mobility (escooter sharing scheme). Opp for free/cheap shuttle to get around the CC | |
| | | | Entertainment: play spaces in the CC highly ranked in what residents would like to see in the CC, as well as weekend farmers' market, large scale concerts and activities for adults without kids. Most comments focused on music, fun for all ages and bringing the Theatre Royal back to life. Entertainment / recreation offering evaluated as extremely poo / somewhat poor by majority of respondents (worst score of all aspects) | |
| | | | indoor sports facilities and shopping malls could attract more people in the CC | |
| | | | Opportunities for improvement in order of preference: Environment, Amenities, Social/gathering places, Safety/hazards, Culture | |
| | | | gardens and green spaces, landmark's information and signage, shelter from sun, wind and rain, covered sitting | |

| | STRENGTH | WEAKNESSES | OPPORTUNITIES | THREATS |
|---|---|---|---|---|
| City Hub perception Survey | Timaru's location (mountain to the ocean) and Caroline Bay's beachside environment are highly valued by residents and visitors. | The most lacking amenities in the city centre are toilets. | 1/3 of residents would support a pedestrian-only city centre recognising that it would likely attract more people to visit, support business and greener environment. | Feeling of being unsafe prevents residents from visiting the city centre. |
| | General atmosphere and friendliness of people was seen as a real strength of Timaru. | The limited food, shopping and entertainment options makes residents quickly feel bored - the spread out nature was noted as was the tired nature of Lower Stafford Street area. | Timaru city centre is considered the region's commercial centre by 73% of residents but more than 89% consider its function as a social centre has priority (86% commercial as a priority). | Only 10% of residents would be strongly interested in living in the city centre (21% possibly interested) - those having the most interest being in the pre-retirement age group (50-64 years) |
| | Ease of access (roads and parking) | There is a need for increase amenities, facilities and entertainment options (more diverse cuisine, boutique shops, events and leisure options for younger people) - across times of the day and seasons. | More green areas was seen as important to attracting people, providing a setting for families to socialise and provide shelter from the sun. | |
| | Unique architecture and 'historic' look | Safety issues around slippery tiles, emptiness of streets at night and undesirable behaviour and traffic. | Providing improved public toilet facilities would be strongly supported. | |
| | | An increase is parking is considered important to attracting people into the city centre and increasing 30mins free parking to 60 mins | 87% of residents get to the city centre by car however give the option of alternative forms of transport this proportion would reduce to 70%. | |
| | | Only 47% consider the city centre the cultural centre of the district and only 21% see it as the recreational centre. | Priorities from city hub investment was in order - more shops/cafes, pedestrian only , good parking facilities, more greenery, restored heritage building and centre in general, more seating. | |
| | | Sense that entertainment and recreation offer in the city centre is not particularly good (only 27% consider it fairly good or excellent) nor is the overall look and feel | Significant numbers of residents would like to walk and use public transport to access the city centre than currently do. | |

| | STRENGTH | WEAKNESSES | OPPORTUNITIES | THREATS |
|---|---|---|---|---|
| | | (41% considering it fairly good or excellent) | | |
| | | | Almost 50% of residents would like council to focus entertainment, recreation and events on music, fun for all ages and the Theatre Royal. | |