

## **Agenda for Meeting No. SG17/12**

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# **SmartGrowth Leadership Group**

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**The SmartGrowth Leadership Group will meet in the  
Western Bay of Plenty District Council Chambers**

**1484 Cameron Road, Greerton, Tauranga**

**on**

**Wednesday 13 December 2017**

**at 9.00am**

G Poole  
**Chief Executive**  
**Tauranga City Council – Administering Authority**

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**Committee Members**

**Independent Chairperson:**

**Bill Wasley**

Bay of Plenty Regional Council:

Chair Cr Doug Leeder  
Cr Jane Nees  
Cr Paula Thompson  
Cr Stuart Crosby  
Cr Andrew von Dadelszen (Alternate)

Tauranga City Council:

Mayor Greg Brownless  
Cr Larry Baldock  
Cr Leanne Brown  
Cr Terry Molloy  
Deputy Mayor Kelvin Clout (Alternate)

Western Bay of Plenty District Council:

Mayor Garry Webber  
Cr Mike Williams  
Cr Don Thwaites  
Cr John Scrimgeour  
Cr Margaret Murray-Benge (Alternate)

Tangata Whenua Representatives:

Maru Tapsell  
Irene Walker  
Buddy Mikaere  
Puhirake Ihaka  
Verna Ohia-Gate (Alternate)

NZ Transport Agency

Parekawhia McLean

Bay of Plenty District Health Board

Ron Scott

Quorum:

9

Meeting Frequency:

At least bi-monthly

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**Role**

Pursuant to Clause 30 Schedule 7 of Government Act 2002, a joint Committee of Tauranga City Council, Western Bay of Plenty District Council and Bay of Plenty Regional Council shall be retained to implement the SmartGrowth Strategy and Implementation Plan.

## **Membership**

- That representation be comprised of four elected member representatives as appointed by the contributing authorities, including the Mayors and Regional Council Chairperson, and four representatives be nominated by tangata whenua.
- That an Independent Chairperson, to be appointed by the Committee, chairs the Committee; and the appointment of a Deputy Chair from the committee membership.
- That the standing membership is limited to seventeen members, but with the power to co-opt up to a maximum of three additional non-voting members, where required, to ensure the effective implementation of any part, or parts, of the Strategy.
- That NZTA be represented through its Regional Director as an observer with speaking rights but in a non-voting capacity.

## **Purpose**

That the joint SmartGrowth Leadership Group be the delegated authority to implement the SmartGrowth Strategy and Implementation Plan in accordance with the following functions:

### **Implementation**

- Overseeing the implementation of the 2013 SmartGrowth Strategy updates, in particular the strategic actions.
- Ensuring organisation systems and resources support the strategy implementation.
- Taking responsibility for progress of those actions specifically allocated to the “SmartGrowth Leadership Group” in the strategy, and making sure the implementation does occur.
- Monitoring and reporting progress against milestones and budget.
- Overseeing the management of the risks identified in implementation.
- Approving an annual implementation plan with a 3 year horizon.

### **Ongoing Tasks**

- Champion integration and implementation through partner strategies, programmes, plans and policy instruments (including the Regional Policy Statement, Regional and District Plans, Long Term Plans (LTP's), Annual Plans, transport plans and triennial agreements), and through partnerships with other sectors such as health, education and business.
- Approving submissions to Local Authorities, Central Government, and other agencies on SmartGrowth related matters.
- Reviewing and recommending adjustments to the strategy if circumstances change.
- Identifying and resolving any consultation inconsistencies between the SmartGrowth strategies and subsequent public consultation processes of the partner councils.

### **Consultation / Partner Forums**

- Facilitating consultation with the community.
- Establishing and maintaining the SmartGrowth Partner Forums.
- Agreeing any memorandum of agreements between SLG and any forums.

### **Committee Operations**

- Selecting and appointing an Independent Chairperson and a Deputy Chairperson.
- Implementing a Memorandum of Agreement, as adopted by the Committee for each triennial period, to provide and maintain partnerships and provide for the resolution of any conflict.
- Establish protocols to ensure that implementation, where necessary, is consistent, collaborative, and / or coordinated to achieve optimal outcome.

## **Agenda for Meeting No. SG17/12**

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### **SmartGrowth Leadership Group**

Wednesday 13 December 2017

9.00am

### **Western Bay of Plenty District Council Chambers**

**1484 Cameron Road, Greerton, Tauranga**

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**Apologies**

**Conflicts of Interest**

**Public Forum** (if required):

**Forum Chair Presentations** (if required):

**Confirmation of Minutes:**

**Confirmation of the Minutes of the SmartGrowth Leadership Group  
(SG17/11) dated 15 November 2017**

A copy of the minutes is attached. **(Paper A)**

**Recommendation:**

*That the minutes of the SmartGrowth Leadership Group (SG17/11) held on 15 November 2017 be confirmed as a true and correct record.*



## **Business**

### **1. SmartGrowth Housing Needs Assessment – research report**

Chris Glaudel of Community Housing Solutions and Ian Mitchell of Livingston and Associates will outline the findings of the SmartGrowth Housing Needs Assessment research report. The full report will be tabled and distributed following their presentation.

### **2. Next Steps – responding to the Housing Needs Assessment and other advocacy priorities**

SmartGrowth Implementation Manager Bernie Walsh will outline next steps in advocacy including responding to the Housing Needs Assessment research report. **(Paper B)**

### **3. Update on Housing and Business Land Assessment: SmartGrowth Development Trends report**

Strategic Advisor Ken Tremaine will update the Leadership Group on progress on the Housing and Business Land Assessment; the completion of the SmartGrowth Development Trends report and 2018 steps towards a new Future Development Strategy. **(Paper C)**

**Minutes of Meeting No. SG17/11 of the SmartGrowth Leadership Group held on  
15 November 2017 in the Bay of Plenty Regional Council, 93 First Avenue,  
Tauranga commencing at 9.00am.**

**Present**

**Independent Chairperson**

W Wasley

**Bay of Plenty Regional Council**

Chairman: D Leeder

Councillors: J Nees, S Crosby, A von Dadelszen (alternate)

**Tauranga City Council**

Mayor: G Brownless

Councillors: L Baldock, L Brown, T Molloy

**Western Bay of Plenty District Council**

Mayor: G Webber

Councillors: M Williams, D Thwaites, J Scrimgeour

**Tangata Whenua Representatives**

M Tapsell, B Mikaere, P Ihaka, V Ohia-Gate (alternate)

**NZ Transport Agency**

P McLean

**In Attendance**

**SmartGrowth**

B Walsh, SmartGrowth Manager

K Tremaine – Implementation Advisor

V Jones – SmartGrowth Administrator

S Rolleston - Tu Pakari Advisor

B Fraser – Strategic Communications Consultant

**Bay of Plenty Regional Council**

M McLeod – Chief Executive

F McTavish – General Manager – Strategy

A Fort – Senior Planner

**Tauranga City Council**

M Tucker – Advisor – Urban Strategy and Growth

**Western Bay of Plenty District Council**

M Taris – Chief Executive Officer

R Davey - Group Manager Policy, Planning & Regulatory Services

**Apologies**

I Walker, P Thompson, R Scott

**THESE MINUTES ARE YET TO BE CONFIRMED**

*To be confirmed by the SmartGrowth Leadership Group on 13 December 2017*

**SG17/11.01 APOLOGIES**

Moved Cr Jane Nees / Seconded Cr Larry Baldock

**That it be Resolved**

***That the apologies be received for I Walker, P Thompson,  
R Scott***

**CARRIED**

**SG17/11.02 DECLARATION OF CONFLICTS OF INTEREST**

No declarations of conflicts of interest were received.

**SG17/11.03 CONFIRMATION OF MINUTES – SMARTGROWTH LEADERSHIP GROUP (SG17/10) – DATED 18 OCTOBER 2017**

The Committee considered the minutes of the SmartGrowth Leadership Group (SG17/10) dated 18 October 2017 as circulated with the agenda.

Moved Cr Mike Williams / Seconded Cr Andrew von Dadelzen

**That it be Resolved**

***That the minutes of the SmartGrowth Leadership Group (SG17/10) dated 18 October 2017 be confirmed as a true and correct record.***

**CARRIED**

**SG17/11.04 SETTLEMENT PATTERN REVIEW (SPR) & NATIONAL POLICY STATEMENT-URBAN DEVELOPMENT CAPACITY PROJECTS UPDATE**

**Presentations:** PowerPoints emailed out on request:

- **Rangiuru Business Park - Scott Hamilton**, Chief Executive, Quayside Holdings
- **Overview and Settlement Pattern Review - Ken Tremaine**, SmartGrowth Strategic Advisor
- **Tauranga Compact City/Urban Strategy - Michael Tucker**, Advisor Urban Strategy and Growth, Tauranga City Council
- **Te Tumu and Tauriko for Tomorrow structure plans – Campbell Larking**, Project Leader, Tauranga City Council.
- **Western Bay structure planning - Phillip Martelli**, Resource Management Manager, Western Bay of Plenty District Council

**THESE MINUTES ARE YET TO BE CONFIRMED**

*To be confirmed by the SmartGrowth Leadership Group on 13 December 2017*

**Moved Mayor Garry Webber / Seconded Verna Ohia-Gate****That it be Resolved****That the SmartGrowth Leadership Group:**

1. **Note** the progress made to date on the SPR and NPS-UDC projects.
2. **Confirm** an approach which outlines development capacity for the first 10 years in detail and then more broadly for the following 20 years, noting that careful monitoring will be undertaken.
3. **Note** that work will continue on development capacity during 2018.
4. **Receive** the presentations Te Tumu and Tauriko for tomorrow structure plans, Tauranga Compact City/Urban Strategy, Western Bay structure planning.

10:30am The meeting **adjourned** for morning tea.

10:45am The meeting **reconvened**.

**SG17/11.05 THE PLANNING, POLICY AND FUNDING ENVIRONMENT**

Time for a reset with a new government. Facilitated discussion.  
A Think Piece (**Paper C**) provided and presented by Bernie Walsh.

Bernie spoke to the new government and ministers - New government, new priorities.

Bill noted policy reset: What could a policy re-set look like?  
A common theme is funding.

Strategic conversations, greater partnerships and achieving that greater scale for infrastructure.

Floor opened for discussion: Key Matters

- Facilitate engagement and set up meetings with new ministers – SmartGrowth & Mayors, Chair to take lead. SG has high level of credibility.
- Funding and infrastructure key areas of need – serious need for new tools in this area – grants, short term solutions. We need more long-term new funding generating opportunities.
- Collective approach going forward and provide presentation to members of parliament, Bill noted the bus tour would be a good opportunity for engagement on the key challenges.
- Port of Tauranga is key for NZ Inc.

Committee expressed key areas of need listed in the presentation:

- Smart Housing Urban design/form
- Smart Infrastructure
- Smart Transport

Chair clarified that funding falls into all of the above areas too – across all three priority issues.

**THESE MINUTES ARE YET TO BE CONFIRMED**

*To be confirmed by the SmartGrowth Leadership Group on 13 December 2017*

Transport – let's not miss rail opportunity considering a billion dollars set aside for regional infrastructure. Tauranga port only has one rail line to Auckland, Need comprehensive report to government –e.g. connecting Te Puke to Rotorua. Alternative link to Auckland for resilience.

- Existing funding proposals to be agreed.
- Land transport - what is the GPS going to tell us?
- Cllr Molloy suggested discussion on: national road pricing right across the country. Could make huge improvement to our transport issues.

**Moved Mayor Garry Webber / Seconded Mayor Grey Brownless**

**That it be Resolved**

**That** the SmartGrowth Leadership Group:

1. **Receive** the report.
2. **Confirm** the next steps as outlined in the agenda report.
3. **Note** that there will be a report back to the Leadership Group in the first half of 2018 once the Government's policy and service delivery roadmap is clear.

**CARRIED**

SG17/11.06

**SMARTGROWTH PARTNERSHIP BI-MONTHLY REPORTS**

**Moved Cr Larry Baldock / Seconded Cr Leanne Brown**

**That it be Resolved**

**That** the SmartGrowth Leadership Group:

1. **Receive** the SmartGrowth Partnership Bi-Monthly Report for November.
2. **Refer** the report to the SmartGrowth Forum Chairs for their information.

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The meeting concluded at 11.56 a.m.

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Confirmed as a true and correct record

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W Wasley  
**Independent Chairperson**

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Date

**THESE MINUTES ARE YET TO BE CONFIRMED**

*To be confirmed by the SmartGrowth Leadership Group on 13 December 2017*



<b>Committee Name</b>	<b>SmartGrowth Leadership Group</b>
<b>Meeting Date</b>	13 December 2017
<b>Author (s)</b>	<b>Bernie Walsh, SmartGrowth Implementation Manager</b>
<b>Purpose</b>	<b>To outline next steps in response to the Housing Needs Assessment and other SmartGrowth advocacy priorities</b>

# Next steps – responding to the Housing Needs Assessment and other advocacy priorities

## Introduction

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Chris Glaudel from Community Housing Solutions, along with Ian Mitchell from Livingston and Associates, will present their Housing Needs Assessment independent report to the SmartGrowth Leadership Group on 13 December. The consultants will be available at the meeting to answer questions, discuss the needs analysis and outline a range of recommended responses. The full report will be tabled at the meeting.

SmartGrowth, in partnership with Tauranga City Council, Western Bay of Plenty District Council and BayTrust have funded the analysis. A SmartGrowth Housing Reference Group, with membership from a range of housing providers, funders and community interest groups has also been engaged in the work as part of completing the final report.

## Next steps

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We have mapped out a series of next steps to guide our SmartGrowth response to the Housing Needs Assessment. These are set out in the table on the following page. These steps should enable a comprehensive response that is both immediate and long-term in nature.

National Policy Statement for Urban Development Capacity work will be integrated and aligned with responses to the Housing Needs Assessment report. Discussions have begun on a more proactive approach and what actions may be needed to respond to the complex nature of housing need. The wider needs of housing our community now and into the future are being set in a broad context, not a narrow market supply and demand approach. A diagram in Appendix 1 illustrates a ‘two-pillar’ approach to sub-regional work that will guide a ‘Smart Housing’ response across the spectrum of our community’s needs.

## Key Timeframes and Next Steps

These are the recommended next steps for responding to the Housing Needs Assessment.

	Next step	Timeframe
<b>SLG</b>	<p>Publish the Housing Needs report on the SG website and issue media release</p> <p>Forward the report link to all SmartGrowth Partners, Forums and key interest groups including central government agencies, Ministers and ministries incl.</p> <ul style="list-style-type: none"> <li>- Chief Executives Advisory Group</li> <li>- SmartGrowth Strategic (Managers) Group</li> <li>- Technical Implementation Group (NPS-UDC) for incorporation into the capacity assessment, the Future Development Strategy and the development of housing targets required in 2018</li> </ul>	<b>13 December 2017</b>
<b>SmartGrowth Partners + others</b>	<p>Allow councils and partners to formally and informally discuss the report seeking</p> <ul style="list-style-type: none"> <li>- Advice and details of any individual council actions in response incl. LTP funding for work</li> <li>- Any partner advice, actions and response to the report</li> <li>- Discussions with any central govt. agencies/Ministers and possible funding partners and wider actions</li> </ul> <p>Independent Chair convenes the Housing Reference Group and Social Infrastructure Providers Group to discuss report. 'Smart Talk' event in February.</p>	<b>13 December 2017 to 5 March 2018</b>
<b>SLG</b>	<p>SmartGrowth Office reports back to SLG with a draft <i>Smart Housing Action Framework</i> from work above</p> <p>Key objective: Co-ordinating actions for maximum impact and effectiveness at a sub-regional level. Strategic partnering.</p>	<p><b>21 March 2018</b></p> <p><b>SmartGrowth Leadership Group (SLG) meeting</b></p>

## Housing and other advocacy activities

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At the 15 November meeting of the SmartGrowth Leadership Group (SLG), members endorsed three key priority issues for the group's advocacy work.

These were

- smart housing and urban form,
- smart infrastructure and
- smart transport.

The Leadership Group discussed the need for a range of new funding tools and agreed next steps for setting a planning and funding policy re-set agenda for advocating to the new Government. We have summarised this advocacy platform as below and included it on page 2 of the Briefing to Government in Appendix 2.

### ***Building a strategic partnership with Government***

*SmartGrowth would like to discuss building a strategic partnership with Government to address the issues that matter to communities.*

*We would like to talk with the Government about how we can work together on the following key challenges and opportunities for better delivery of actions and results.*

- ***Funding of infrastructure (recognising that current funding approaches to growth from a local government perspective are no longer fit for purpose) and the ongoing Government commitments to key projects that underpin the success of our SmartGrowth Strategy***
  - ***Supporting a long-term, integrated and responsive sub-regional approach to urban planning and growth management***
  - ***Expansion, integration and use of rail – sub-regional, regional and inter-regional***
  - ***Partnering in the provision of housing for our community across the spectrum of need*** *SmartGrowth has just completed a detailed and robust Housing Needs Assessment evidence-base with its partners.*
  - ***Planning and funding of sub-regional and regional public and active transport***
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## Minister's letter

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Since the SLG meeting, the Minister for Housing and Urban Development and for Transport, the Hon. Phil Twyford has written to Regional Transport Committees (RTCs) outlining policy priorities. A new Government Policy Statement (GPS) on Transport will be issued by the end of December 2017. RTCs are expected to consider this as an engagement draft in early 2018 as part of the development of Regional Transport Plans.

The Minister said he had asked officials to revise the GPS to take account of a range of matters including

- Giving public transport greater priority in cities and expanding the public transport system to support new housing and inter-regional commuting
- Increasing the use of rail to enable efficient passenger and freight use
- Supporting regional development
- Increasing support for active modes – walking and cycling
- Mode neutrality in freight transport planning

He explained that some priorities may require more fundamental changes to the scope of the GPS, and also result in changes to local, regional and national planning processes. Exploring how rail investment is incorporated within the GPS and the National Land Transport Fund will be the focus of ongoing work. These fundamental changes are still to be determined and will not form part of the final GPS 2018. He talked about working with regions to “implement an integrated, multi-modal transport system”.

## Transport projects – are any at risk?

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As a new Government steps up with new priorities – both nationally and regionally – in theory any transport project that is not in its construction phase could be under review. Government funding commitments are effectively not set in stone until construction contracts are in operation.

It will be important that SmartGrowth clearly communicates, and more importantly demonstrates to the NZ Transport Agency's board and to Ministers how transport projects in the current national and regional funding priority list underpin our current and future settlement strategy for growth management and that they are integrated and multi-modal.

This includes State Highway projects, most notably the Northern Link and the Katikati Bypass. Government fully funds and prioritises these projects. While these projects have a high priority listing in the Regional Transport Plan (RTP), Government will focus on national prioritisation while taking into account regional priorities.

SmartGrowth transport projects are currently high on the priority list of the draft Regional Transport Plan with the Tauriko West Network Connections (1), Eastern Corridor Growth Projects (2), Western Corridor Growth Management – Tauriko West connections (3), the Cycle Action Plan (4) and SH29 Kaimai Summit to Tauriko (5).

This draft Priority List is expected to change once the GPS is finalised. The Regional Action Group (RAG), where every council is represented, will work through a revised prioritisation list and plan for a future Regional Transport Committee meeting early in 2018.

Regions now need to have their adopted RTPs to the Transport Agency by 30 June 2018 instead of 30 April. The Bay of Plenty Regional Transport Committee has agreed to hold a special meeting early next year to consider adopting a draft RTP for public consultation.

Telling a strong and succinct regional, and an aligned sub-regional, story to our community, and to the Government, will be important. This needs to clearly explain how this transport investment, particularly at a State Highway level, and the associated council prioritised projects and business cases, are vital to delivering and supporting new housing and sustainable regional and transport development including freight and population growth.

Council transport plans are aligned to a multi-modal approach across roads, walking, cycling and public transport – and Long-Term Plans (LTP) have investment programmes that reflect that focus. There will be a joined-up transport story across the three councils' LTP public consultation processes that clearly communicates and demonstrates this approach to the community and our partners early in 2018.

Minister Twyford also has a five point agenda as Minister of Housing and Urban Development, detailed at the Infrastructure NZ AGM. The five points are:

- Infrastructure funding and financing
  - A pro-growth planning system
  - Road pricing
  - Spatial planning by central and local government
  - Legislative reform of the Resource Management Act, Local Government Act and Land Transport Management Act.

These five points would seem to align well with SmartGrowth's advocacy priorities.

## Advocacy actions

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### 1. Minister meetings or visits – early 2018

Independent Chair to co-ordinate SmartGrowth Partnership Leaders (Mayors & Regional Chair) to meet with/write to key Ministers early in the New Year to discuss western Bay of Plenty's SmartGrowth approach and seek a strategic partnership across funding, housing need, transport investment to support a sustainable growth strategy, infrastructure challenges and opportunities including rail. We would invite key Ministers to visit western Bay of Plenty as part of a Bay of Plenty trip and undertake a 'SmartGrowth tour'. Engagement with local Government MPs and senior advisers in Ministerial offices is an initial action focus.

An updated interim short SmartGrowth Briefing to Government is attached as Appendix 2 for immediate use. This will be supplemented with summarised fact sheets from the latest SmartGrowth Development Trends report (included in this agenda) and the new Housing Needs Assessment data (released today).

**Action lead:** SmartGrowth Independent Chair with Mayors/Regional Council chair and SmartGrowth Implementation Manager

2. **Policy and funding re-set agenda, sub-regional transport story integrated with Future Development Strategy - 21 March 2018 - SmartGrowth Leadership Group**

The Regional Investment Oversight Group (a transport-focused group of Council General Managers and NZTA senior staff) will report on 21 March on the collaborative approach to transport across the sub-region. This is a follow-up action to the SLG October Strategic Transport workshop. Its report will also discuss how to strengthen land use and transport planning integration.

The SmartGrowth Independent Chair will also report back at the 21 March meeting on the planning, policy and funding environment including the work he is leading on the SmartGrowth policy re-set advocacy agenda (follow up action from November 15 SLG meeting).

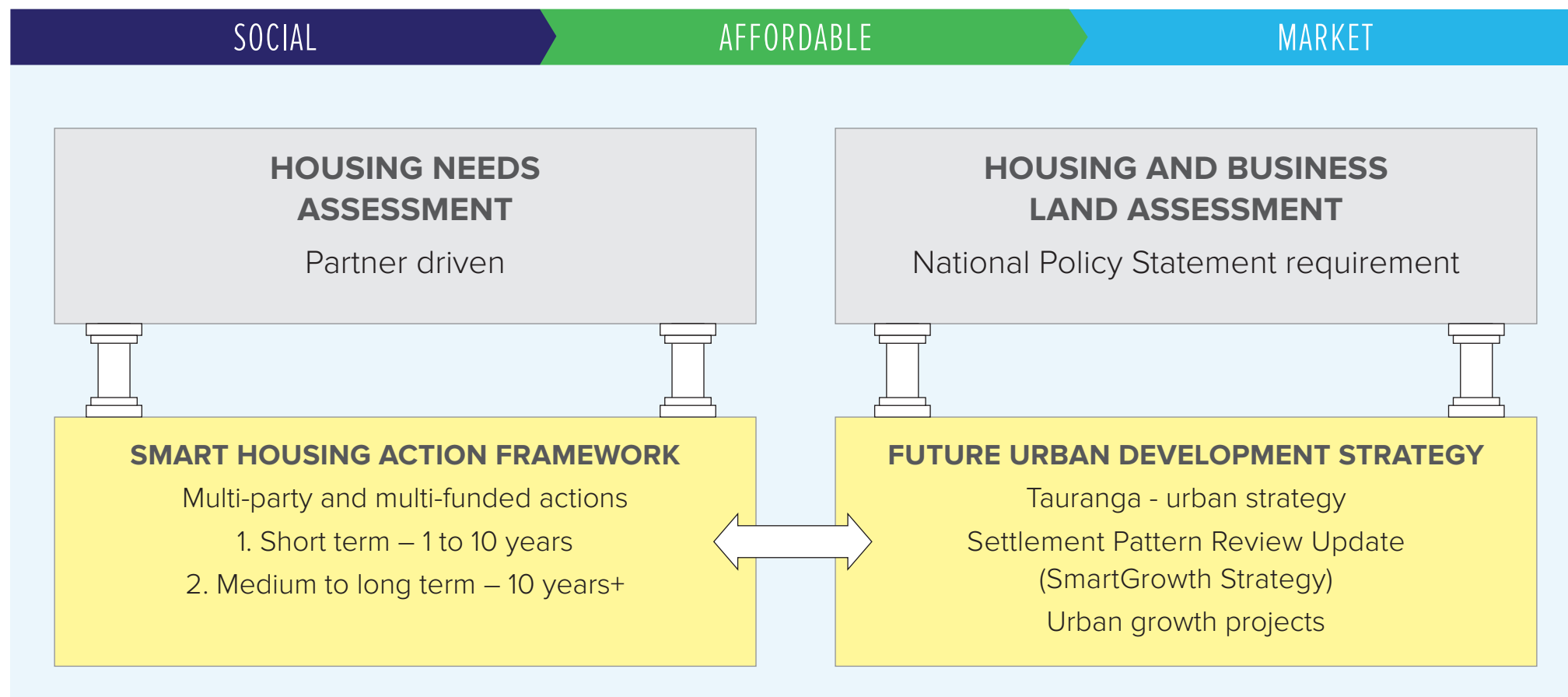
**Action lead:** SmartGrowth Independent Chair, SmartGrowth Implementation Manager, Strategic Advisor, Regional Investment Oversight Group

## Recommendations

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- 1 **Agree** the next steps as set out in the table on page two of this report as a pathway for responding to the Housing Needs Assessment report tabled at today's meeting.
- 2 **Agree** the SmartGrowth Independent Chair should proceed with arranging advocacy actions including early 2018 Ministerial meetings/visits.
- 3 **Note** that the March 21 meeting of the SmartGrowth Leadership Group will focus on agreeing a more detailed policy advocacy agenda and actions. The Transport Regional Investment Oversight Group will also report on collaborative work at this meeting.

# Smart housing spectrum





# BUILDING OUR FUTURES TOGETHER

## BRIEFING TO THE GOVERNMENT

Leading the way as a smart  
partnership focused on strategic  
and spatial future planning for  
the western Bay of Plenty







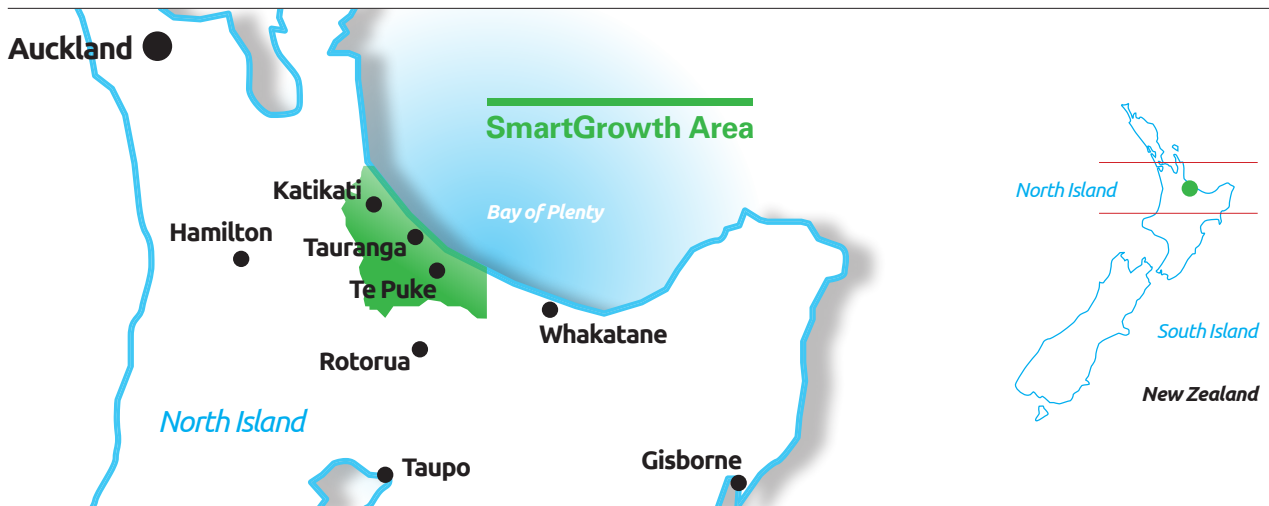
# Executive Summary

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The SmartGrowth journey began in 2000 and has evolved from a growth management strategy into a comprehensive spatial plan for the western Bay of Plenty sub-region. SmartGrowth sets the strategic vision and direction for the growth and development of the western Bay on key issues across the spectrum of social, environmental, economic and cultural objectives.

SmartGrowth is more than the spatial plan document – it is a collaboration that has been working successfully for the past 16 years, leading the way nationally in integrated sub-regional planning and strategic thinking.

[www.smartgrowthbop.org.nz](http://www.smartgrowthbop.org.nz)



Key strategic sub-regional issues that the Partnership will need to take smart leadership on include:



### Smart housing and urban design/form

How do we get the housing our sub-region needs including quality, quantity, density done well, urban design, and a range of housing types across the sub-region? Placemaking and placeshaping and the role of different towns, urban and suburban centres.



### Smart infrastructure

Supporting the SmartGrowth blueprint for future development (settlement pattern) of the sub-region with the right infrastructure. Ensuring we are seen as a credible co-investor able to partner with central government to deliver results on the ground. United advocacy to central government.



### Smart transport

Future-proofing our transport system and addressing growing traffic congestion, given the current single occupant car travel preferences across the sub-region. Providing for more active and safe transport choices including increasing use of public transport, walking and cycling. Smart transport also includes air connectivity and airport services for a growing sub-region.

## Building a strategic partnership with Government

SmartGrowth would like to discuss building a strategic partnership with Government to address the issues that matter to communities.

We would like to talk with the Government about how we can work together on the following key challenges and opportunities for better delivery of actions and results.

- Funding of infrastructure (recognising that current funding approaches to growth from a local government perspective are no longer fit for purpose) and the ongoing Government commitments to key projects that underpin the success of our SmartGrowth Strategy ([see page 6](#))
- Supporting a long-term, integrated and responsive sub-regional approach to urban planning and growth management ([see page 8](#)) ([9](#)) ([11](#)) ([12](#))
- Expansion, integration and use of rail – sub-regional, regional and inter-regional ([see page 7](#)) ([10](#))
- Partnering in the provision of housing for our community across the spectrum of need ([see page 4](#)) ([9](#))

**SmartGrowth has just completed a detailed and robust Housing Needs Assessment evidence-base with its partners.**

- Planning and funding of sub-regional and regional public and active transport ([see page 6](#))



The SmartGrowth Leadership Group (SLG) has an important role to play in driving strategic thinking.

### 1. Sub-regional spatial planning including urban form/settlement, transport and National Policy Statement (NPS) compliance

- Providing sub-regional leadership on spatial planning, growth, infrastructure planning and development, focusing on key issues relating to the four well-beings (the recently approved four integrated urban area/capacity projects to deliver housing and business land development; and previous tertiary education provision advocacy and support opportunities across the sub-region, are good examples of SmartGrowth's sub-regional leadership).
- High-level spatial planning and achieving SmartGrowth outcomes.
- NPS for Urban Development Capacity compliance/ Settlement Pattern – strategic sub-regional agreement/guidance on the SmartGrowth settlement pattern.
- Infrastructure / Facilities – where this affects more than one SmartGrowth partner and transcends boundaries (especially transport).
- Setting and monitoring strategy progress and sub-regional policy, actions and approaches relevant to the SmartGrowth Strategy.

### 2. Advocacy – united voice for western Bay of Plenty

- United voice – where an issue requires joint advocacy and one strong, united voice – mayors, chair and partners together provide a powerful platform for engaging with central government on co-investment issues e.g. central government service provision for housing, health, economy, tertiary education, transport, emergency services, any other gaps.
- Intra and inter-regional matters – there are impacts beyond the sub-region (eg intra and inter regional) that need addressing across the SmartGrowth partners.
- Matters of Upper North Island or national importance that impact on the sub-region (eg freight movement, maintaining range of transport options).

### 3. Future thinking – leading community conversations/events across the western Bay of Plenty

- Facilitating community understanding and discussions/conversations on long term spatial planning issues with a view to looking beyond 10 years to 20, 30 years and 50 years ahead.



## Building our Futures Together

*The SmartGrowth Leadership Group's (SLG) role and functions are changing and growing.*

The SmartGrowth Leadership Group (SLG) is a joint committee of Tauranga City Council, Western Bay of Plenty District Council, Bay of Plenty Regional Council and Tāngata Whenua.

The New Zealand Transport Agency and the Bay of Plenty District Health Board are implementation partners.

The following overviews and factsheets outline the work that the SmartGrowth Partnership is leading, driving forward and co-ordinating across the western Bay of Plenty.

# An overview of housing in western Bay of Plenty

The current housing continuum and work across the spectrum



## RESEARCH – COMPLETE OR UNDERWAY

- National Policy Statement for Urban Development Capacity (NPSUDC) – Housing Assessment – Due December 2017
- Hidden Homeless – Hatch Report 2016 (Tauranga City Council, Bay of Plenty District Health Board and Our Community Project group)
- Sustainable Housing in the Bay of Plenty 2016 (Centre for Social Impact)
- Submission to cross party homelessness enquiry – Tauranga 2016 (TCHT, Tauranga Men's Night Shelter, Te Tuinga Whanau, SocialLink)
- Older Persons Renting (Population Ageing Technical Advisory Group/SmartGrowth)
- Co-Housing for Older Persons
- Western Bay of Plenty District Council Seasonal Worker Accommodation Research
- Housing Our Community Needs – comprehensive housing needs analysis for sub-region due October 2017

## STRATEGIES – COMPLETE OR UNDERWAY

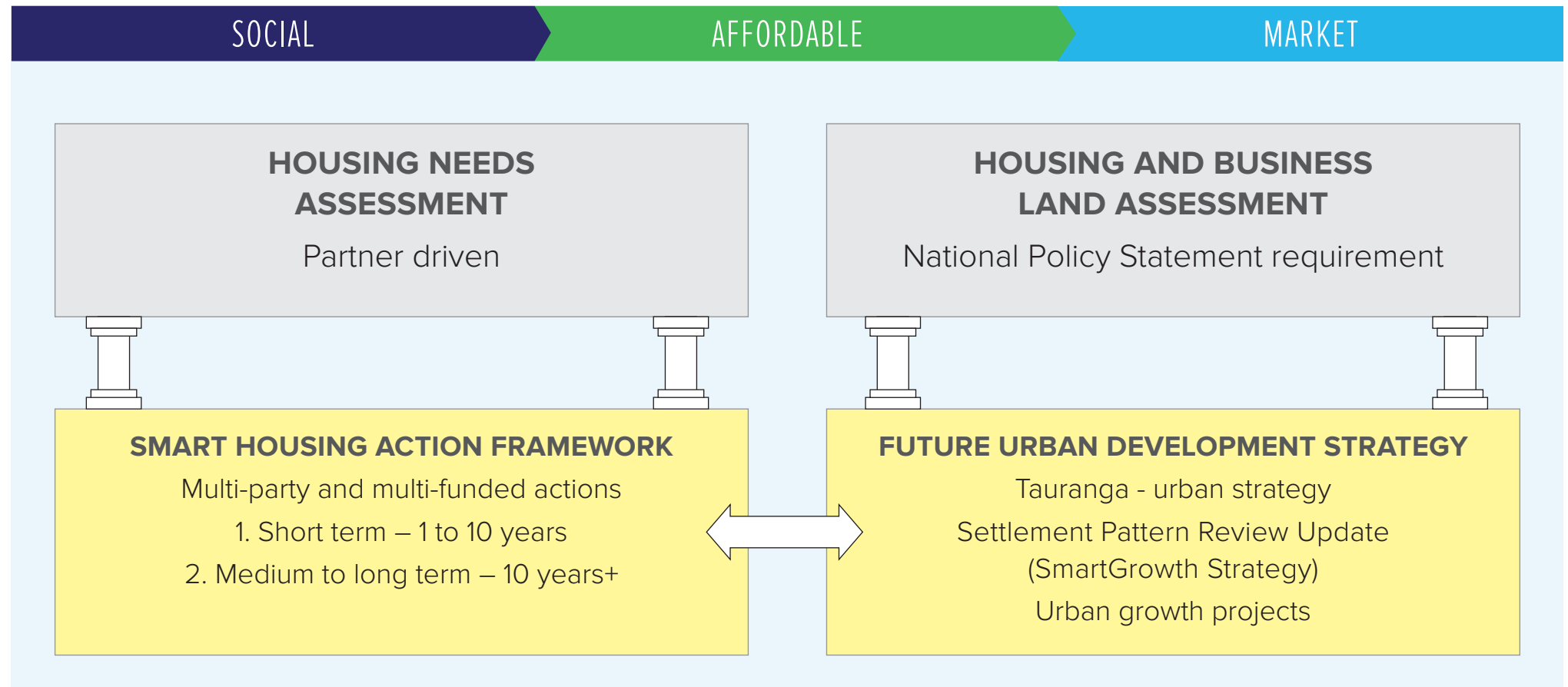
- SmartGrowth Strategy 2013
- SmartGrowth Settlement Pattern
- NPSUDC – Housing Assessment – Due December 2017
- Tauranga Urban Strategy – December 2017
- Joint Agency Group (JAG) facilitate Papakainga housing and development on Settlement land
- Our Community Project – proposed Housing First hub for homeless people

## PROGRAMMES

- Healthy Homes (COBOP, District Health Board)
- Universal Design (LifeMark)
- A Healthy Whare Project
- Project Wai Ora
- Ministry of Social Development new build social housing

← QUALITY OF HOUSING →

# Smart housing spectrum



# An overview of transport in western Bay of Plenty

## WHAT'S BEING PLANNED

**LEAD AGENCY**  
(in collaboration with transport partners)

### TAURANGA TRANSPORT PLAN

Long term transport plan (includes travel demand management and support for compact city and urban strategy). [More information](#)

Tauranga City Council

### TAURANGA CYCLE PLAN [More information](#)

Tauranga City Council

### TAURANGA PARKING STRATEGY

Tauranga City Council

### REGIONAL PUBLIC TRANSPORT PLAN + NEW WESTERN BAY BUS NETWORK PLAN FOR TAURANGA/TE PUKE

And new public transport ticketing system (from mid 2018). [More information](#)

Bay of Plenty  
Regional Council

### WESTERN BAY DISTRICT TRANSPORT STRATEGY

And the Western Bay District Cycle Strategy including Omokoroa to City cycleway

Western Bay of Plenty  
District Council

### REGIONAL LAND TRANSPORT PLAN

30-year Bay of Plenty regional transport plan (draft being prepared for consultation in late 2017)  
All of the strategies and plans that are being planned and delivered, along with other transport related strategies/initiatives, will inform the development of the Regional Land Transport Plan. [More information](#)

Bay of Plenty  
Regional Council

## STATE HIGHWAYS

[More information](#)

### PIARERE TO TAURIKO (SH29)

– business case under way for investment

NZ Transport Agency

### WAIHI TO TAURANGA CORRIDOR (SH2)

– business case under way for investment  
– Katikati bypass

NZ Transport Agency

### MAINTAINING THE CURRENT NETWORK

The NZ Transport Agency and councils also plan and deliver the maintenance of the current transport network. This is a significant cost – more than half the transport investment in our sub-region goes just on maintaining and operating our current transport system.

## WHAT'S BEING DELIVERED

**LEAD AGENCY**  
(in collaboration with transport partners)

### TAURANGA TRANSPORT IMPROVEMENTS

Set of corridor and safety improvements, road upgrades, cycling and pedestrian links

Tauranga City Council

### PUBLIC TRANSPORT SERVICE

– across western Bay of Plenty

[More information](#)

Bay of Plenty  
Regional Council

### OMOKOROA SH2 IMPROVEMENTS

NZ Transport Agency,  
Western Bay of Plenty  
District Council

### NEW COMMUNITIES – FROM 2021

#### Te Tumu – future transport

(Eastern Corridor – see overleaf)

[More information](#)

#### Tauriko for tomorrow

(Western Corridor – see overleaf)

[More information](#)

All agencies:  
NZ Transport Agency,  
Tauranga City Council,  
Western Bay of Plenty  
District Council, Bay  
of Plenty Regional  
Council, SmartGrowth



### BAYFAIR TO BAYPARK LINK

NZ Transport Agency

### MAUNGATAPU UNDERPASS

NZ Transport Agency

### POIKE ROAD OVER BRIDGE

NZ Transport Agency

### TAURANGA NORTHERN LINK

NZ Transport Agency

### TE PUNA / MINDEN ROUNDABOUT (SH2)

NZ Transport Agency

## WHO DOES WHAT

### Integrating transport and future community planning.



#### NZ TRANSPORT AGENCY:

- Works in partnership, primarily with councils, to maintain and deliver a nationally integrated land transport system (funding/planning/delivery)
- Responsible for allocating investment of the National Land Transport Fund (gathered from road user charges; fuel excise duty)
- Responsible for State Highways



#### TAURANGA CITY COUNCIL

- City-wide transport planning and delivery
- Infrastructure (footpaths, cycleways, bus stops, bus lanes etc) for city roads, public transport, walking, cycling
- Owns Tauranga Airport. Operated under Airport Authority Act, governed by Airport Advisory Group. The airport is a standalone 'business unit' of the council and requires no ratepayer funding. Delivering Tauranga Airport Master Plan



#### WESTERN BAY OF PLENTY DISTRICT COUNCIL

- District-wide transport planning and delivery
- Infrastructure (footpaths, cycleways, bus stops, bus lanes etc) for district roads, public transport, walking, cycling



#### BAY OF PLENTY REGIONAL COUNCIL

- Region-wide public transport service, planning and delivery (Regional Public Transport Plan)
- Region-wide transport planning including prioritising significant projects seeking NZ Transport Agency investment (Regional Land Transport Plan)



#### KIWI RAIL

- Responsible for maintaining rail corridors
- Rail freight service provider



#### BAY OF PLENTY DISTRICT HEALTH BOARD/ TOI TE ORA

- Assessing health and wellbeing impacts of transport and promoting transport as a key community health determinant

#### UPPER NORTH ISLAND STRATEGIC ALLIANCE

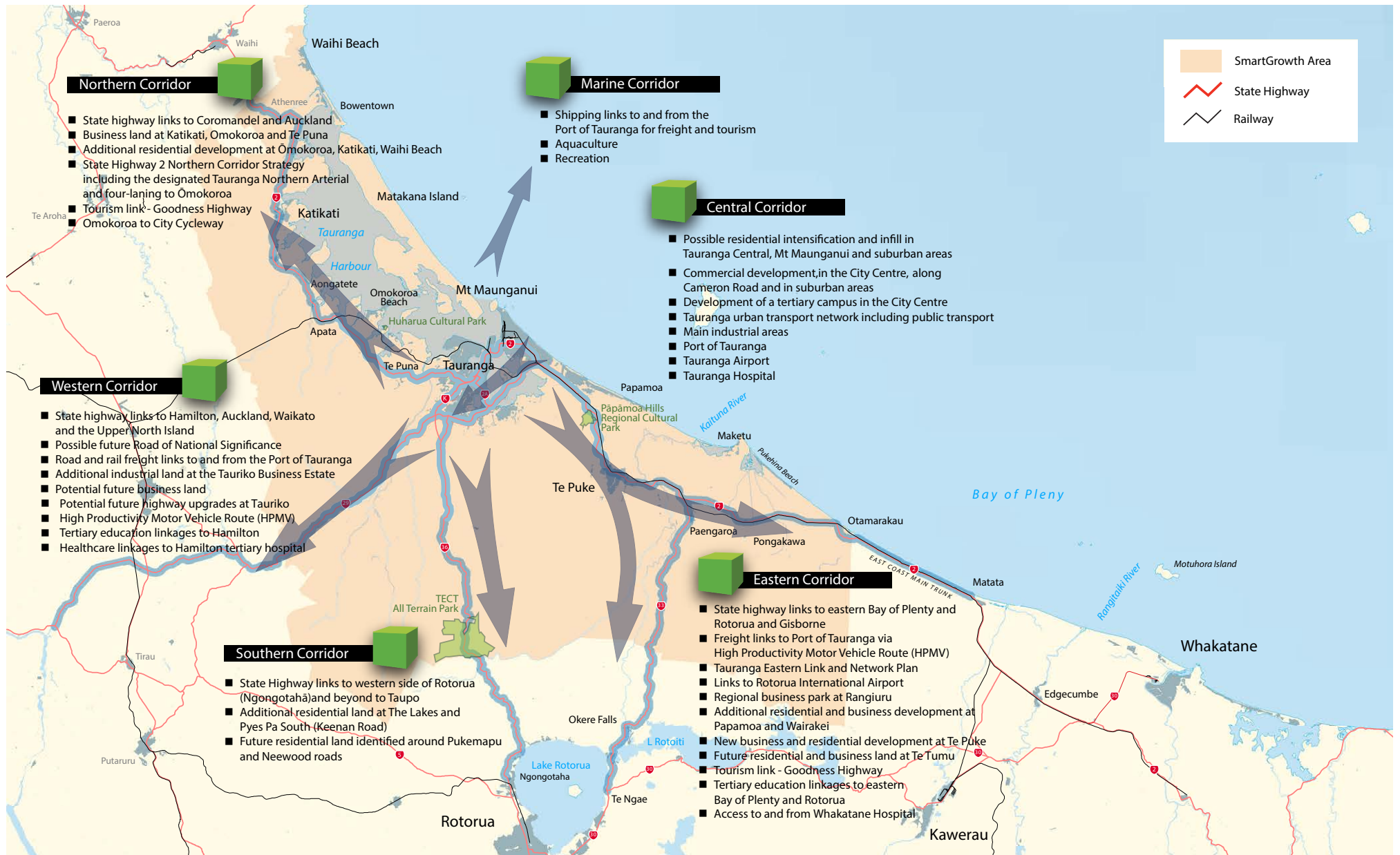
(Auckland/Northland/Bay of Plenty/Waikato)

- Cross-council alliance – has completed inter-regional studies including freight story and ports

#### BAY OF CONNECTIONS

- Economic development focus with Freight Logistics Action Group – Freight Logistics Strategy [More information](#)

# Regional context and SmartGrowth corridors



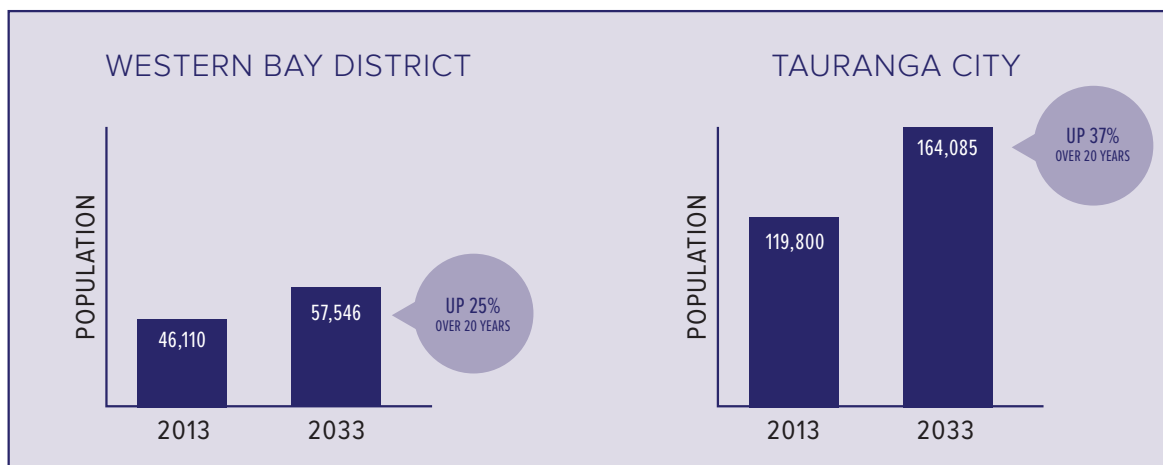


# Our Future Population

THINKING SMARTLY ABOUT...

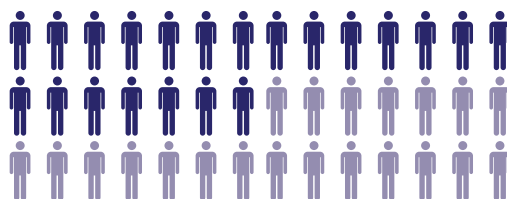
## OUR FUTURE POPULATION

in the western Bay of Plenty



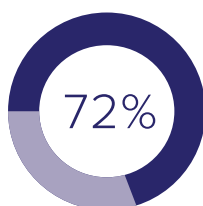
### IN 2033 ...

TAURANGA CITY  
WILL BE HOME TO  
ABOUT HALF OF THE  
REGION'S POPULATION

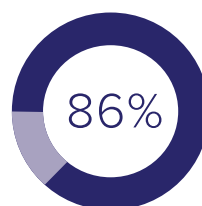


### THERE IS A SILVER LINING TO OUR GROWTH PROJECTIONS...

Most of the population growth to 2033 is expected to be in the 65+ years age group...



72%  
of the population  
growth in  
Tauranga City



86%  
of the population  
growth in  
Western Bay of Plenty

### BY 2063 ...

The population of  
Tauranga City is  
projected to be nearly

**200,000**  
(198,372)

Tauranga City will need  
to accommodate around

**45,000**  
NEW HOUSEHOLDS



### BY 2033 ...

over 1/3 of Tauranga and Western Bay of  
Plenty District's population will be aged 65+

TOTAL POPULATION 2033

UNDER 65

65+

Source: 2014 Review of Demographic and Labour Force Projections for the Bay of Plenty Region 2013-2063, National Institute of Demographic and Economic Analysis, University of Waikato; Statistics NZ, Estimated Resident Population (ERP)



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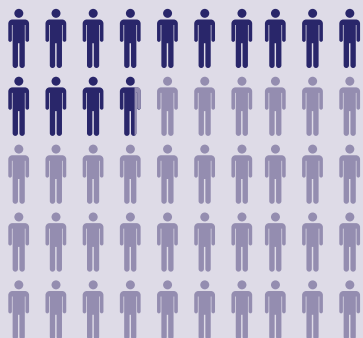
# Our Future Māori Population

in the western Bay of Plenty

THINKING SMARTLY ABOUT...

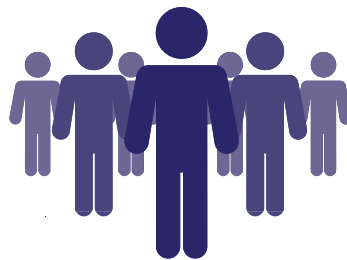
## OUR FUTURE MĀORI POPULATION

in the western Bay of Plenty



**27.5%**

of people in western  
Bay of Plenty are of  
Māori descent  
(43,857 people)



Ngāi Te Rangi  
Ngāti Ranginui  
Ngā Puhi

ARE THE MOST POPULOUS IWI

Māori have  
a youthful  
population

A lot are aged  
19 years old  
or under



**33%**

OF MĀORI OWN THEIR  
OWN HOME



*Kia Tu Pakari Ai Tatou*

Source: 2013 Census data. SmartGrowth Māori and Tāngata Whenua Iwi Demographics 2015



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# Our Place

in the Upper North Island

THINKING SMARTLY ABOUT...

## OUR PLACE

in the Upper North Island

The three regions of Auckland, Waikato and Bay of Plenty are expected to grow at a greater rate than the rest of the country.

### BY 2031

it is expected that together they may account for

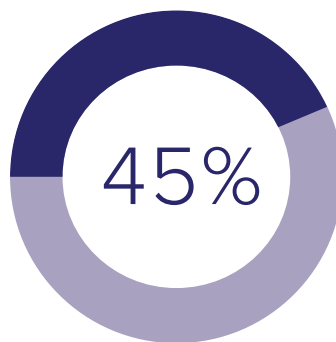
**53%** of New Zealand's population.

AUCKLAND

HAMILTON

TAURANGA

Auckland, Waikato and Bay of Plenty currently generate over 45% of the nation's gross domestic product.



THE THREE REGIONS ARE RESPONSIBLE FOR

**OVER HALF**

OF ALL ROAD AND RAIL FREIGHT



THE REGIONS ARE PROJECTED TO ACCOUNT FOR HALF OF NEW ZEALAND'S TOTAL ECONOMIC ACTIVITY BY 2025.

Source: SmartGrowth Strategy 2013

[www.smartgrowthbop.org.nz](http://www.smartgrowthbop.org.nz)





# Our Future Employment

THINKING SMARTLY ABOUT...

## OUR FUTURE EMPLOYMENT

in the western Bay of Plenty

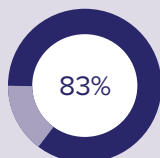
The SmartGrowth Partnership has done some analysis and thinking\* about what our future employment demand and supply trends might look like. These are not predictions, but rather forward looking projections that help us do long-term planning. We will update the work regularly.



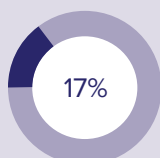
**Total employment is expected to grow by nearly 40,000 JOBS BY 2063.**

Most of this growth is expected to occur by 2048-2050.

### WHERE WILL THE NEW JOBS BE LOCATED?



of the employment growth to 2063 is expected to be located in Tauranga.



of the employment growth to 2063 is expected to be located in Western Bay District.

A large share of the job growth is expected in out of zone\*\* locations. Services expected to account for 70% of the 'out of zone' growth – projected to contribute 15,315 jobs over the next 50 years.

More than half of the western Bay's sub-regional job growth is expected from services.



### BY 2050 EMPLOYMENT IN...

**Tauranga**  
up 46%

**30,610**  
new jobs

**Western Bay District**  
up 33%

**6,230**  
new jobs

### IN THE FUTURE, WE EXPECT...

#### MORE PEOPLE WILL BE WORKING LONGER...



we are expecting an increase in the number of employees aged 65-69 and 70-74. This will lift the size of the labour force available to businesses and our economy.

#### AN INCREASE IN PEOPLE COMMUTING...



the number of workers commuting into the western Bay of Plenty from other areas such as Waihi, Paeroa, Rotorua, Hamilton and Whakatane is expected to go up, currently at 1.7%.

(Census 2013).

JOBS IN A RANGE OF SECTORS ARE EXPECTED TO GROW ACROSS THE WESTERN BAY OF PLENTY.



Agriculture



Industry



Retail



Services



Education

\*Source: SmartGrowth Employment Projections, Methodology and Key Findings, April 2017. The assessment report covers a long timeframe, with considerable uncertainty. New technologies and other trends such as population and export growth influence how businesses grow, use labour and interact with each other and change traffic demand and patterns. The exact nature of these changes are impossible to predict with complete accuracy. This work is modelled using a range of information including industry interviews but should be viewed as forward looking projections, not futuristic predictions. For the full report, visit [www.smartgrowthbop.org.nz](http://www.smartgrowthbop.org.nz)

\*\*Out of zone refers to areas not specifically zoned in statutory council plans for business or commercial activities



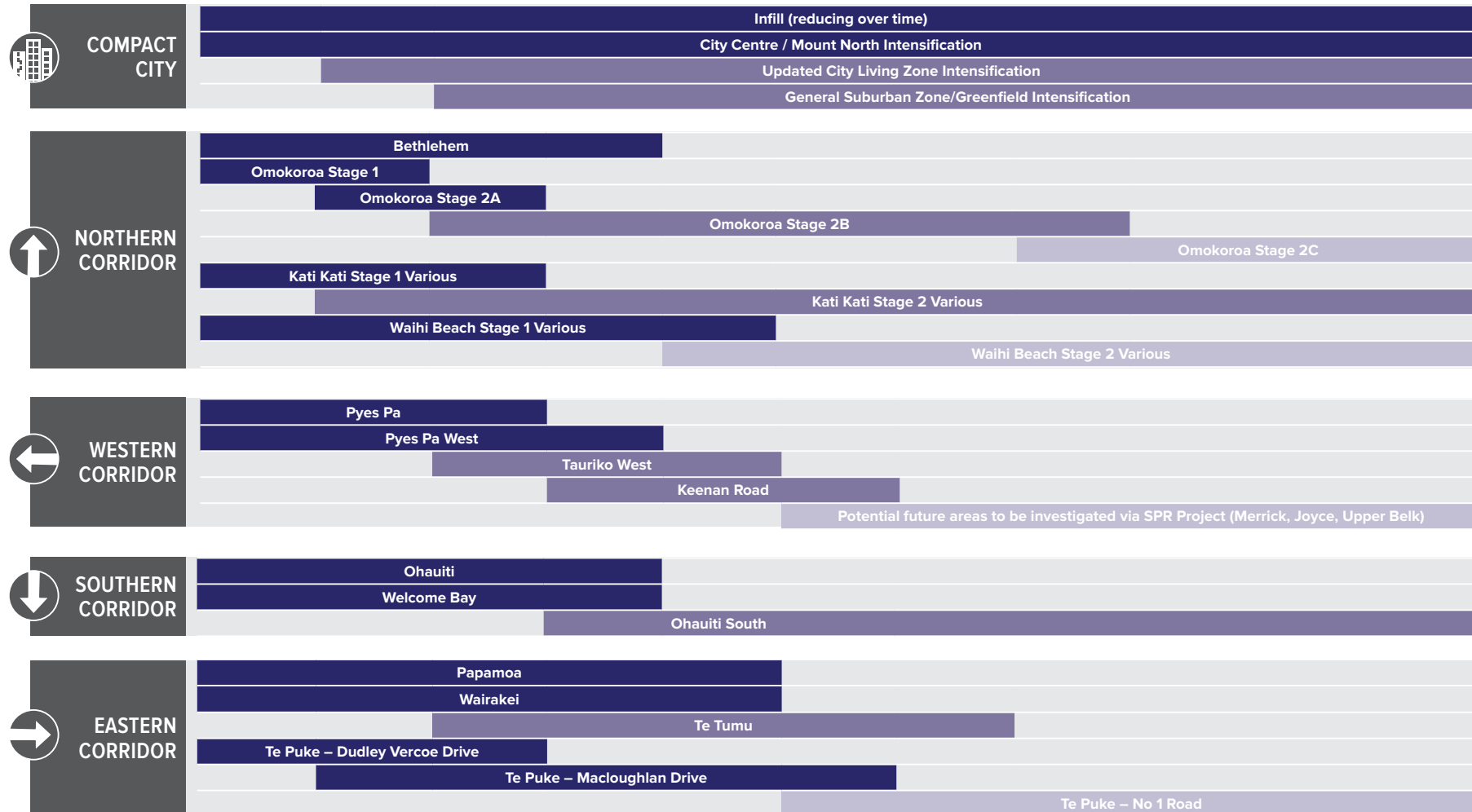
**SmartGrowth**  
Building our futures together

[www.smartgrowthbop.org.nz](http://www.smartgrowthbop.org.nz)




# SMARTGROWTH SEQUENCING TIMETABLE

## Western Bay of Plenty Sub Region Indicative Growth Sequencing

2013  2063



**KEY:**

-  OPERATIVE (Residentially zoned and under development)
-  HIGHER LEVEL OF CERTAINTY
-  LOWER LEVEL OF CERTAINTY



[www.smartgrowthbop.org.nz](http://www.smartgrowthbop.org.nz)

January 2018





<b>Committee Name</b>	<b>SmartGrowth Strategic Leadership Group</b>
<b>Committee Meeting Date</b>	<b>13 December 2017</b>
<b>Author (s)</b>	<b>Ken Tremaine, Strategic Advisor on behalf of the SG Partners</b>
<b>Purpose</b>	<b>To provide the SLG with the draft Development Trends report, an update on the Housing and Business Development Capacity assessment and an outline of next steps for SPR and NPS work next year, particularly the Future Development Strategy</b>

## SPR and NPS-UDC Projects

### Introduction

---

The purpose of this report is to provide the SLG with the draft Development Trends report which has been expanded to include the National Policy Statement on Urban Development Capacity (NPS-UDC) monitoring requirements. This report also provides an update on the Housing and Business Development Capacity Assessment and an outline of next steps for the Settlement Pattern Review (SPR) and NPS-UDC work next year, particularly the Future Development Strategy.

### Development Trends Report

---

Each year SmartGrowth produces a Development Trends report to monitor residential and business development trends in the sub-region. The report is unique nationally and over the years has turned into a seriously competent piece of work. The draft 2017 SmartGrowth Development Trends report has been expanded to incorporate NPS-UDC monitoring requirements. The report is still in draft as it will need to be updated once the Housing and Business Development Capacity Report is completed. The Development Trends report will then be able to include information on how much development capacity we have remaining at various timeframes.

The full draft report is contained in **Appendix 1**.

The NPS-UDC (through Policy PB6) requires that Council's monitor a range of indicators on a quarterly basis including:

- prices and rents for housing, residential land and business land, by location and type; and the changes in these prices and rents over time;

- the number of resource consents and building consents granted for urban development relative to the growth in population; and
- indicators of housing affordability.

### **Key Findings**

The key findings of the 2017 Development Trends report are as follows:

- Building consents issued for new dwellings increased by 14% in the sub-region for 2016/17 compared to the previous year.
- Subdivision development in the sub-region increased by 84% from 2015/2016 results.
- For Tauranga City the number of dwelling consents issues for 2016/17 increased in the Papamoa, Wairakei and Pyes Pa West Urban Growth Areas.
- The greenfield urban growth areas remain the main dwelling activity area accommodating 87% of new dwellings for Tauranga City – urban infill areas accommodated 12%.
- For Western Bay of Plenty District, dwelling consents issues in greenfield Urban Growth Areas increased by 25% during 2016/17 and the rural areas decreased by 2%.
- Of the total estimated yield for the Greenfield UGA's in the sub-region, 28% capacity remained as at 30 June 2017.
- Median sale prices have increased by 18.9% for Tauranga City and 24.6% for Western Bay of Plenty District in the 2016/17 year.
- A higher proportion of dwelling consents were issued in 2016/17 for “townhouses, flats, units and other dwellings”, “apartments” and “retirement village units” and less standalone “houses” in 2016/17 than the last 5 year average for the sub-region.
- There is vacant industrial and commercial zoned land in the sub-region.
- Building consents for both commercial and industrial buildings increased in 2016/17 from 2015/16 results.

This monitoring work provides important information for the Development Capacity Assessment, setting minimum housing targets and the Future Development Strategy. All of this background information, while challenging to collect and analyse, will better inform our decision making on how the property market is working and where it is falling short on meeting needs.

The NPS-UDC monitoring is required quarterly but we will continue to link it closely to the Development Trends report in order that all of the data is well integrated and fit for purpose in that it addresses local needs as well as the NPS-UDC requirements.

## **Development Capacity Assessment**

---

The SmartGrowth Technical Implementation Group (TIG) has been meeting every month to progress this project.

The Housing and Business Development Capacity Assessment report due at the end of 2017 is underway. As indicated in the report presented to the November Leadership Group meeting, a draft Capacity Assessment report will be produced early next year and presented to the

Leadership Group. We will have a first draft finished by the 31 December 2017 timeframe but we are unlikely to have this completed until next year. We are not the only high growth area in this situation. The requirements for the Development Capacity Assessment are quite onerous, including the need to identify the demand for different types of dwellings, locations and price points, the demand for different types and locations of business land and floor area for businesses, and assessing interactions between housing and business activities, and their impacts on each other. We also need time to analyse the Housing Needs Assessment work and incorporate its findings into the capacity assessment.

M.E Consulting has been engaged to undertake the business land analysis component of the NPS-UDC work for the sub-region. The TIG is progressing the housing capacity analysis. This includes working on the calculations/mapping of development capacity for housing and business into the short/medium/long terms.

The 'Housing we Need' analysis is currently underway. This work covers the current housing stock and any challenges / issues, a future view of what is needed to meet the community's housing needs and identifying any gaps between what is currently being supplied and what is needed in the future. The SmartGrowth Housing Needs Assessment report is being finalised and will be presented/tabled at SmartGrowth Leadership Group on 13 December. This material will also be key to the development of the Future Development Strategy through the potential policy responses/interventions that may be pursued by the partners.

## Future Development Strategy

---

The NPS-UDC requires a Future Development Strategy (FDS) to be in place by 31 December 2018. The FDS will become part of the SmartGrowth Strategy through the Settlement Pattern Review. The FDS is, in effect, the spatial response to the Development Capacity Assessment work.

### Tasks and Timeframes

There are several strands to the NPS-UDC work that will need to come together as part the SmartGrowth Settlement Pattern Review (SPR). These include, inputs from the development capacity assessment; setting minimum targets; preparing the FDS, enabling sufficient development capacity through the RPS and DPs as well as other tools.

The following table sets out the key tasks for completing the FDS along with other NPS-UDC work, and provides an indication of likely timeframes.

Task	Timeframe
Ongoing NPS-UDC monitoring for each quarter. Note that this is a cornerstone tool moving forward.	Ongoing – each quarter
Complete draft development capacity assessment using the existing evidence base.	31 December 2017
SLG workshop the implications of the residential and business development capacity assessment.	February 2018
Begin work on setting minimum targets for sufficient, feasible development capacity for housing which establishes the relationship between greenfields and intensification development.	February / March 2018

Identify key settlement pattern amendments as a result of findings of the residential and business development capacity assessment.	March / April 2018
<p>Complete Future Development Strategy<sup>1</sup> work:</p> <ul style="list-style-type: none"> <li>▪ identify the broad location, timing and sequencing of future development capacity over the long term in future urban environments and intensification opportunities within existing urban environments;</li> <li>▪ balance the certainty regarding the provision of future urban development with the need to be responsive to demand for such development; and</li> <li>▪ be informed by the relevant Long Term Plans and Infrastructure Strategies required under the Local Government Act 2002, and any other relevant strategies, plans and documents.</li> <li>▪ Establish links between the FDS and the LTP's beyond the first 10 years when innovative intensification initiatives need to be investigated and funded</li> </ul>	February – May 2018
Work on a modified RPS and DP objective, policy, method / rule framework to support the Future Development Strategy	February – May 2018
Complete drafting of the FDS (the review of Part C- Settlement Pattern of the 2013 SmartGrowth Strategy)	June - July 2018
Public notification of the FDS for input. Hear submissions and refer FDS to partners for adoption	August – October 2018
Amend RPS and DP documents to incorporate targets and possible notification of any RPS or DP changes as a result of the NPS-UDC work to enable development capacity and to provide flexibility (note these steps are dependent on the existing NPS-UDC not being amended by the current Government)	Nov - Dec 2018

## Recommendations

---

That the SmartGrowth Leadership Group:

1. **Receive** the draft Development Trends Report for 2016/17 attached as Appendix 1 which incorporates the NPS-UDC monitoring requirements.
2. **Note** the progress made to date on the Housing and Business Development Capacity Assessment.
3. **Note** the proposed tasks and timeframes for completing the rest of the NPS-UDC tasks, in particular the Future Development Strategy.

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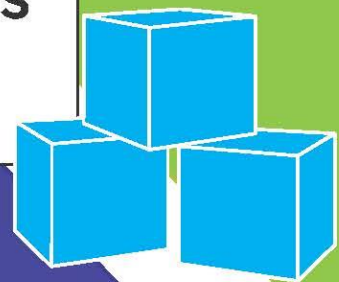
<sup>1</sup> How does the Future Development Strategy differ from the current SmartGrowth Strategy? It differs mainly in the need to identify intensification opportunities and to be informed by the housing and business development capacity assessments as well as ongoing monitoring.





**Draft**

# SmartGrowth: Development Trends Technical Report 2017





# **Draft SmartGrowth: Development Trends Technical Report 2017**

Including Housing and Business Market Indicators to meet the quarterly monitoring requirements of the National Policy Statement on Urban Development Capacity (PB6)

**Western Bay of Plenty District  
Tauranga City**

**2016 – 2017**

**Prepared by:**

Resource Management Team  
Policy Planning and Regulatory Group  
**Western Bay of Plenty District Council**

City and Infrastructure Planning  
Growth and Infrastructure Group  
**Tauranga City Council**

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# 1. Executive Summary

## 1.1 Residential Building Activity

### Sub-region

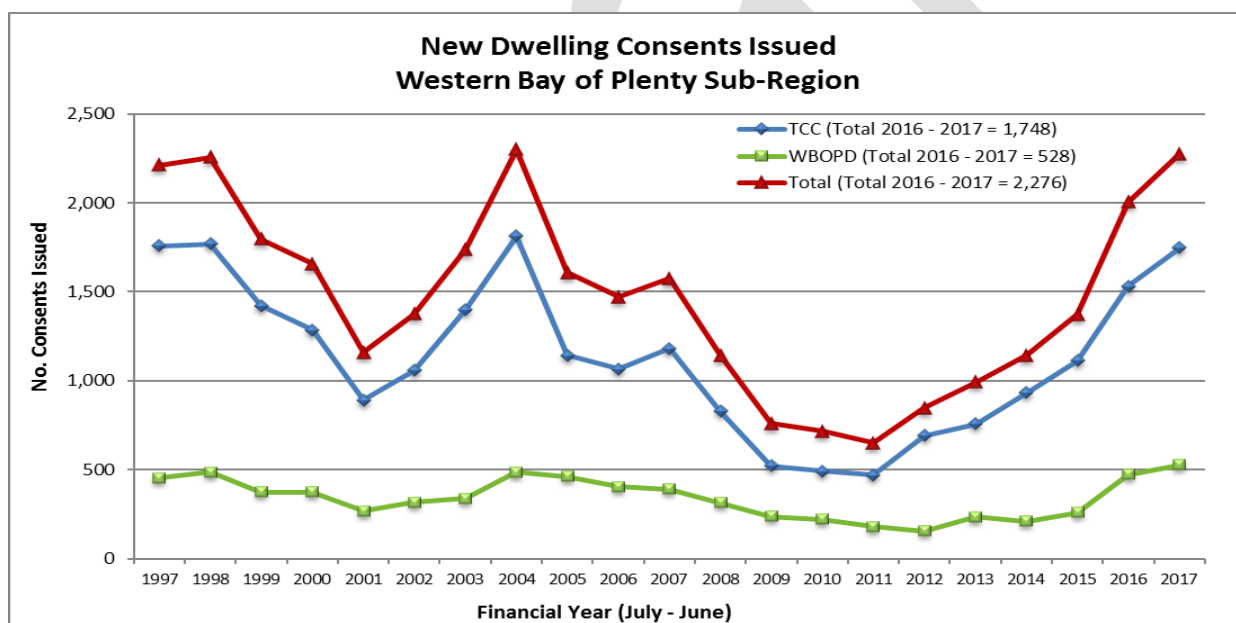
- In 2016/2017, building consents issued for new dwellings increased by 14% in the Western Bay of Plenty sub-region (the sub-region) compared to the previous year (refer Chart 1).

### Tauranga City

- Dwelling consents issued for the 2016/2017 year increased in Papamoa, Wairakei and Pyes Pa West Greenfield Urban Growth Area's (Greenfield UGA's) while decreased in Bethlehem, Pyes Pa, Ohauiti and Welcome Bay Greenfield UGA's from 2015/2016 results (refer Table 1).
- The Greenfield UGA's remain the main dwelling activity areas accommodating 87% of new dwelling consents issued for Tauranga City in 2016/2017 (existing urban (Infill) areas accommodated 12% and rural areas 1%).

### Western Bay of Plenty District - WBOPD

- Dwelling consents issued in Greenfield UGA's increased by 25% during 2016/2017 and the rural areas decreased by 2%. Most of the dwelling consents were issued in Omokoroa UGA with an increase of 29% during 2016/2017.
- The overall increase in dwelling consents issued for Western Bay of Plenty District was 11%.



**Chart 1 Observation:**

The total number of dwelling consents issued in the sub-region has increased by 14% from 2015/2016 to 2016/2017 (from 2,005 to 2,276 dwelling consents). For Tauranga City there were 217 (or 14%) more dwelling consents issued during the July 2016 to June 2017 period compared to 2015/2016 results, while for Western Bay of Plenty District there was an increase of 54 (or 11%) dwelling consents issued.

## 1.2 Residential Subdivision Activity

### Sub-region

- Subdivision development in the sub-region increased by 84% from 2015/2016 results.

### Tauranga City

- The number of additional lots created increased by 89% in 2016/2017 compared to 2015/2016 and was 91% up on the last 5 year average.
- In Tauranga City 83% of additional lots were created in Greenfield UGA's in 2016/2017.

### Western Bay of Plenty District

- The number of additional lots created at 224 stage has increased significantly in Omokoroa while it slowed down in Katikati due to less availability of land. Additional lots created increased by 46% from 2015/2016 to 2016/2017 for the District.
- The Greenfield UGA's showed an increase of 63%, with most of the additional lots created in Omokoroa and Te Puke, while the rural areas showed a slower increase of 44% in subdivision development.

**Table 1. Trends Summary – Tauranga City – 2016/2017 Compared to 2015/2016**

Area		Dwellings Consented	New Lots Created
<i>Urban Growth Area</i>	Bethlehem	↓	↑
	Pyes Pa	↓	↑
	Pyes Pa West	↑	↑
	Ohauiti	↓	↑
	Welcome Bay	↓	↑
	Papamoa	↑	↑
	Wairakei	↑	↑
Existing Urban Areas (infill/ Intensification)		↑	↓
Rural Areas		↓	↑

**Table 2. Trends Summary - WBOPD – 2016/2017 Compared to 2015/2016**

Area		Dwellings Consented	New Lots Created
<i>Urban Growth Area</i>	Waihi Beach	↑	↓
	Katikati	↑	↓
	Omokoroa	↑	↑
	Te Puke	↑	↑
	(Other than above)	↓	↓
Rural Areas	Waihi Beach & Katikati	↑	↓
	Te Puna / Minden	↓	↑
	Kaimai / Ohauiti-Ngapeke	↓	↑
	Maketu & Te Puke wards	↓	↑

## 1.3 Residential Development Capacity

### Sub-region

- A comparison of SmartGrowth projections with actual growth at the sub-regional level indicates that the number of dwelling consents issued is 5% below the projection as at 30 June 2017.
- Of the total estimated yield for the Greenfield UGA's in the sub-region, 28% capacity remained as at 30 June 2017.

### Tauranga City

- Tauranga City was 6% below the SmartGrowth dwelling projection as at 30 June 2017.
- Remaining Greenfield UGA capacity was 32% as at 30 June 2017.
- Wairakei (Papamoa East) Greenfield UGA has the highest percentage of capacity remaining (76%), while Pyes Pa UGA the least (15%).

### Western Bay of Plenty District

- Western Bay District was 1% above the SmartGrowth dwelling projection as at 30 June 2017.
- Remaining Greenfield UGA capacity was 18% as at 30 June 2017.
- Waihi Beach UGA has the lowest theoretical remaining capacity available with 9% or 280 dwellings, while Omokoroa UGA has the largest capacity remaining in Western Bay of Plenty District with 41% or 1,080 dwellings (refer to Table 5).

## 1.4 Residential Sales and Rents

### Tauranga City

- Median sale price has increased by 18.9% to \$605,750 in last 12 months to 30 June 2017.
- Mean rent has increased by 6.9% to \$418 in last 12 months to 30 June 2017.

### Western Bay of Plenty District

- Median sale price has increased by 24.6% to 584,509 in last 12 months to 30 June 2017.
- Mean rent has increased by 6.8% to \$355 in last 12 months to 30 June 2017.

## 1.5 Dwelling Typology

### Tauranga City

- Mean floor size of residential building consents increased from 171m<sup>2</sup> in 2015/2016 to 181m<sup>2</sup> in 2016/2017.
- A higher proportion of dwelling consents were issued in 2016/2017 for "retirement village units" and "apartments" and less for standalone "houses" than the last 5 year average.

### Western Bay of Plenty District

- Mean floor size of residential building consents has decreased from 191m<sup>2</sup> in 2015/16 to 187m<sup>2</sup> in 2016/2017
- A higher proportion of dwelling consents were issued in 2016/2017 for "townhouses, flats, units and other dwellings", and less for standalone "houses" than the last 5 year average.

## **1.6 Business Land and Activity**

### Sub-region

- Vacant industrial zoned land is currently available at Oropi, Te Maunga, Owens Place, Mount Maunganui, Tauriko, Sulphur Point, Greerton, Wairakei (Papamoa East), Katikati, Omokoroa, Te Puke, Rangiuru and Paengaroa.
- Vacant commercial land in Greenfield UGA's is available at Pyes Pa West/Tauriko, Bethlehem, Papamoa and Wairakei in Tauranga City and Omokoroa in Western Bay of Plenty.

### Tauranga City

- The number of building consents issued increased for both new industrial buildings and new commercial buildings compared to 2015/2016.

### Western Bay of Plenty District

- New industrial and commercial building consents issued increased from 2015/2016 for Western Bay of Plenty District. In 2016/2017, six new industrial building consents and five new commercial building consents were issued, of which most of the industrial and commercial consents were in Te Puke.

## 2 Introduction

Monitoring development trends in the Western Bay of Plenty District and Tauranga City assists both Councils in understanding the changing patterns of development in the sub-region. These statistics are collected as part of Councils Section 35 of the Resource Management Act 1991 obligations being a “duty to gather information, monitor and keep records”.

This is the seventeenth year that development trends have been monitored for the Western Bay of Plenty sub-region. From 2007, the report has been expanded to incorporate measures related to development as required by the Bay of Plenty Regional Policy Statement (RPS), and the SmartGrowth Strategy.

The RPS requires annual reviews to be undertaken to monitor, assess and report on population distribution, dwelling yields, zoned business land, and the proportion of potential residential allotments approved. SmartGrowth requires uptake rates and land availability for both residential and business land, permanent versus holiday residences, and rural subdivision to be monitored. Also a comparison of actual growth against projected SmartGrowth dwelling growth is reported on.

The National Policy Statement on Urban Development Capacity (NPS-UDC), came into effect on 1 December 2016. Tauranga Urban Area (which relates to both Tauranga City and Western Bay of Plenty District<sup>1</sup>) is classified as a high growth urban area under the NPS-UDC. NPS-UDC Policy PB6 requires Council’s to monitor a range of indicators on a quarterly basis including:

- a) prices and rents for housing, residential land and business land, by location and type; and the changes in these prices and rents over time;
- b) the number of resource consents and building consents granted for urban development relative to the growth in population; and
- c) indicators of housing affordability.

The 2017 SmartGrowth Development Trends Report has been expanded to incorporate a number of relevant indicators to meet NPS-UDC monitoring requirements (refer table 3), while continuing the development trends data time series. This report will be produced annually for the period 1 July to 30 June. For interim NPS-UDC quarterly monitoring a simpler reporting framework will be introduced.

### 2.1 National Policy Statement on Urban Development Capacity Monitoring

A Technical Implementation Group (TIG) has been established by SmartGrowth, comprised of staff from the three Councils (Tauranga City Council, Western Bay of Plenty District Council, Bay of Plenty Regional Council) and other partners, to respond to requirements of the NPS-UDC.

The deliverables required by the NPS-UDC include (in sequence):

- establishing a monitoring regime (Policies PB6 and PB7);
- undertaking housing and business land assessments;
- setting development capacity targets for housing in statutory (Resource Management Act) planning documents – i.e. the Bay of Plenty Regional Policy Statement, Tauranga City Plan and Western Bay of Plenty District Plan; and
- developing (and consulting on) a Future Development Strategy to show how the identified targets will be met into the long term.

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<sup>1</sup> Western Bay of Plenty District (WBOPD) indicators are displayed for total WBOPD (urban and rural) or only the urban growth areas which include Waihi Beach, Katikati, Omokoroa and Te Puke.



As indicated above, in addition to PB6 requirements, NPS-UDC PB7 requires local authorities to use indicators of price efficiency in their land and development market, to understand how well the market is functioning and how planning may affect this, and when additional capacity might be needed. MBIE is currently developing a number of price efficiency indicators which will be incorporated into future NPS-UDC monitoring reports once available.

Housing and business land assessments are currently being undertaken and are to be completed by 31 December 2017 as required by the NPS-UDC. The assessments will include information about the range of business uses and dwelling types, and provide evidence based estimates of demand and feasible capacity. The key outputs of these assessments, including estimates of remaining capacity and projected uptake rates, will be incorporated and monitored in future NPS-UDC monitoring reports once available.

The Ministry for the Environment (MfE) and Ministry of Business Innovation and Employment (MBIE) have released a guide to support the implementation of the NPS-UDC<sup>2</sup>, and an online dashboard that provides charts, maps and underlying data on local housing markets. This was consulted in the preparation of this report, and the dashboard used to produce a number of graphs.

The indicators particularly relevant to the NPS-UDC PB6 monitoring requirement are outlined in Table 3. The majority of indicators have a residential focus due to the availability of residential data through the MBIE/ MfE dashboard, and Council records. SmartGrowth will work with its partners to source appropriate business indicators for future PB6 quarterly monitoring reports.

**Table 3: NPS-UDC PB6 Indicators to be Monitored**

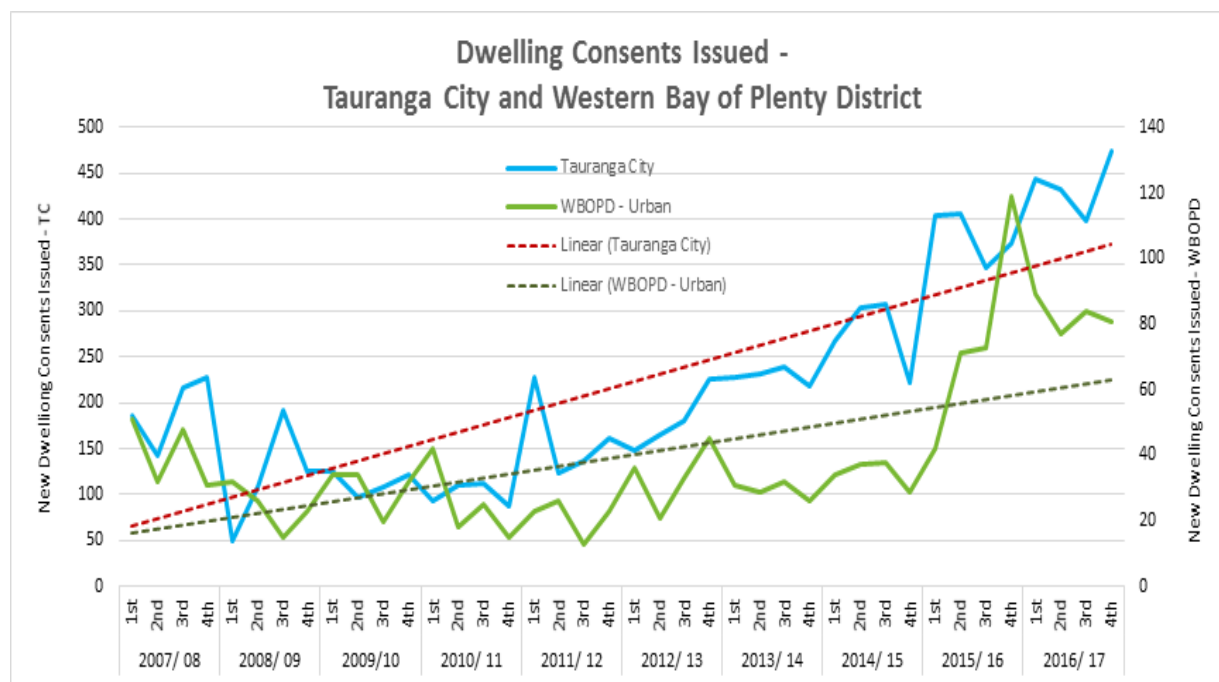
SGDT Ref	NPS-UDC Ref	Type	Topic	Indicator
3.1	PB6 b)	Residential	Dwelling Consents	New Dwelling Consents
3.1	PB6 b)	Residential	Location	Building Consents by Location
3.2	PB6 b)	Residential	New Lots	New Lots Created
3.2	PB6 b)	Residential	Location	New Lots Created
3.3	PB6 b)	Residential	Household Growth	Dwelling Consents Compared to Dwellings Projected
4.1	PB6 a)	Residential	Prices	Dwelling Sales Price
4.2	PB6 a)	Residential	Rents	Nominal Rents for Dwelling
4.3	PB6 a)	Residential	Prices	Dwellings Sold
4.4	PB6 a)	Residential	Prices/ Rents	Ratio of Dwelling Sales Prices to Rent
4.6	PB6 c)	Residential	Prices	Housing Affordability Measure (HAM) – Buy
4.6	PB6 c)	Residential	Rents	Housing Affordability Measure (HAM) – Rents
5.1	PB6 a)	Residential	Type	Floor Size per Residential Building
5.2	PB6 a)	Residential	Prices	Construction Value per Residential Building Dwelling Consent
5.3	PB6 a)	Residential	Type	Building Consents by Type
6.4	PB6 a)	Business	Type	Non-Residential Building Consents by Type
6.5	PB6 a)	Business	Prices	Building Consents by Construction Value

An explanation of indicators provided via the MBIE/MfE guidance or dashboard is provided in Appendix 1, and referenced under the relevant indicator through the report.

<sup>2</sup> National Policy Statement on Urban Development Capacity: Guide on Evidence and Monitoring, Ministry of Business, Innovation and Employment and the Ministry for the Environment, June 2017.

## 3 Supply and Demand

### 3.1 New Dwelling Consents Issued

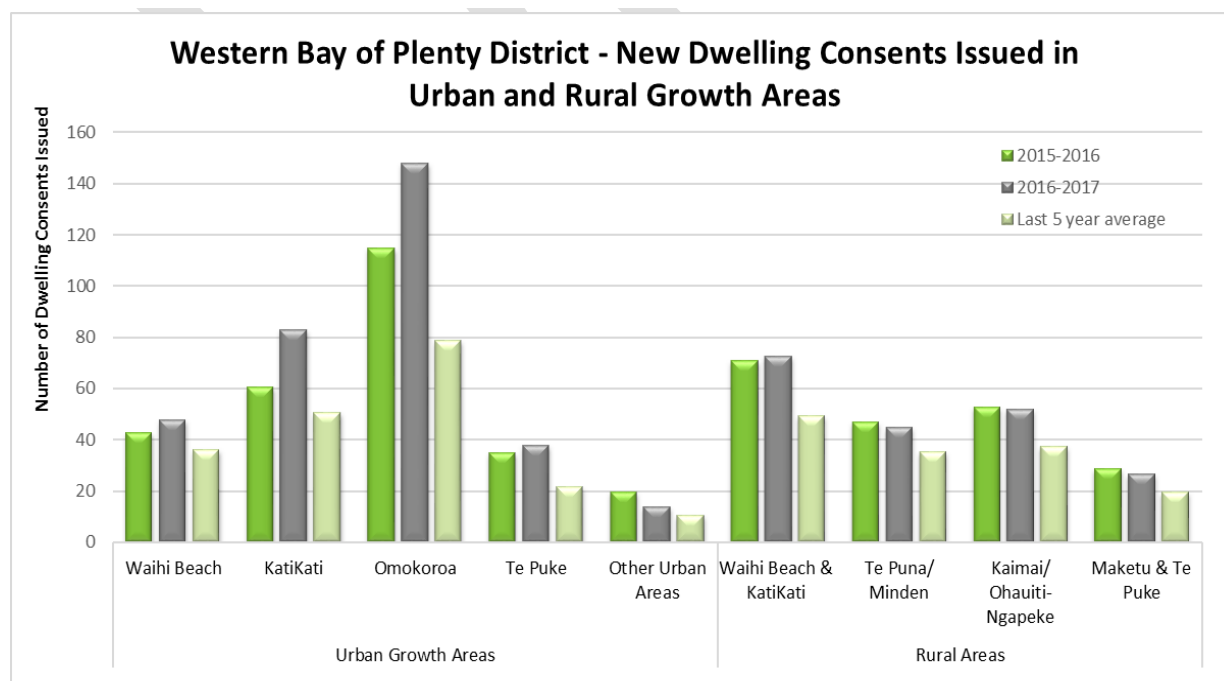


Note: A "Linear" trend line has been included in Charts 2 and 5 to show the general trend over time. "Linear" trend line – a relationship of direct proportionality that, when plotted on a graph, traces a straight line.

#### Chart 2 Observation:

In Western Bay of Plenty District (WBOPD) there has been variation in dwelling consents issued in the Greenfield Urban Growth Areas (UGA's) over the last 10 years. Dwelling Consents Issued in the urban areas increased significantly in the last 2 years (305 in 2015/16 and 331 in 2016/2017). In 2007/2008 the monthly average for dwelling consents issued were 14, compared to the monthly average of 28 for 2016/2017.

In Tauranga City building consents issued for new dwellings increased by 14% (or 217 consents) from 2015/2016 (1,531 dwelling consents issued) to 2016/2017 (1,748 dwelling consents issued). The last 5 year average was 1,216 dwelling consents. In 2007/2008 the monthly average for dwelling consents was 69, compared to a monthly average of 145 for 2016/2017.

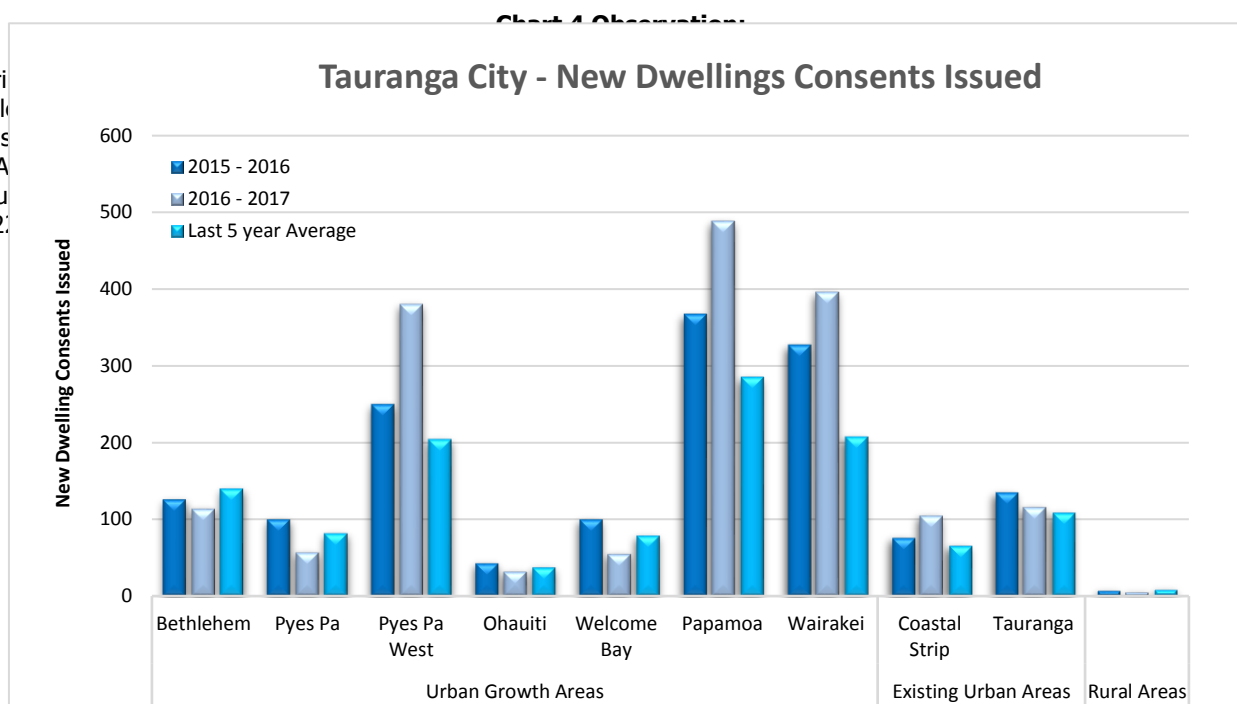


#### Chart 3 Observation:

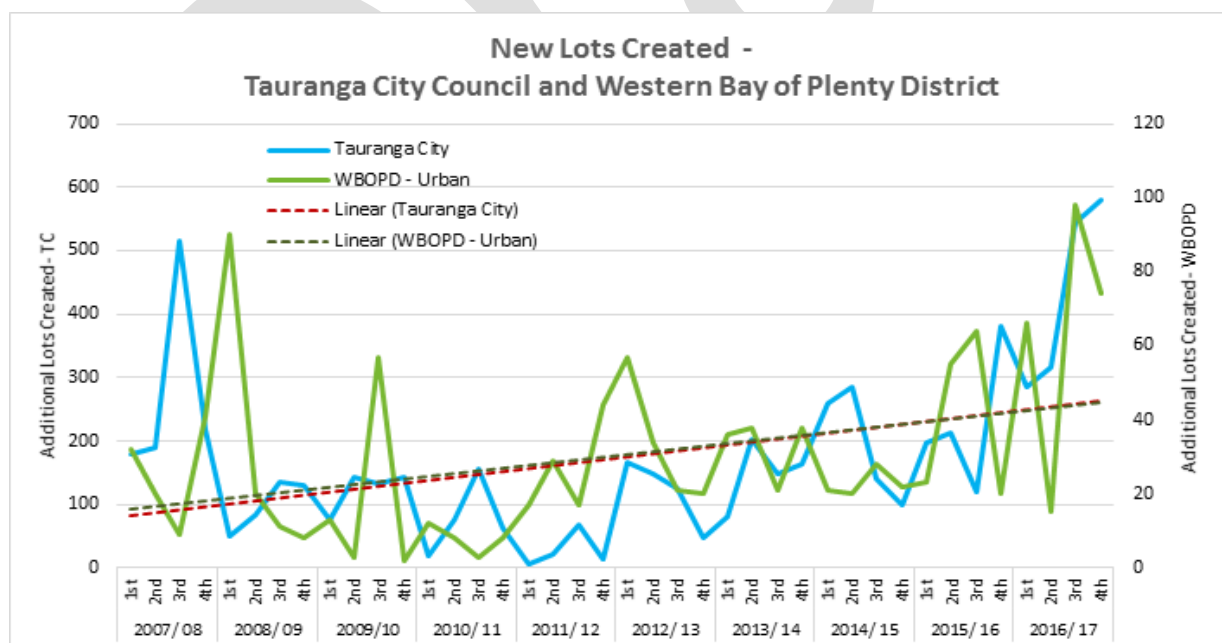
Dwelling consents issued increased in all of the main Greenfield UGA's and only in the Waihi Beach/ Katikati rural areas. In the Greenfield UGA's there were an increase in new dwelling consents issued of 25% and in the rural areas there were a decrease of 2% from 2015/2016 to 2016/2017. In 2016/2017, dwelling consents issued in Omokoroa UGA increased by 29% compared to the previous year.

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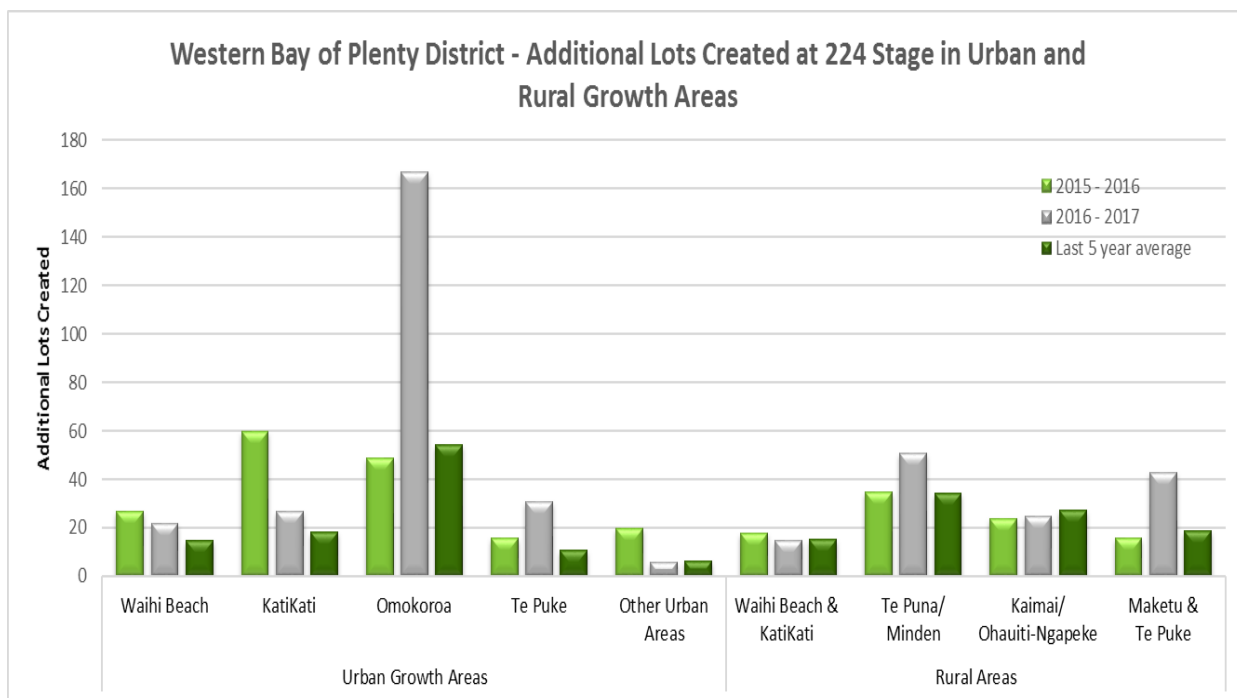
## 3.2 New Lots Created



**Chart 5 Observation:**

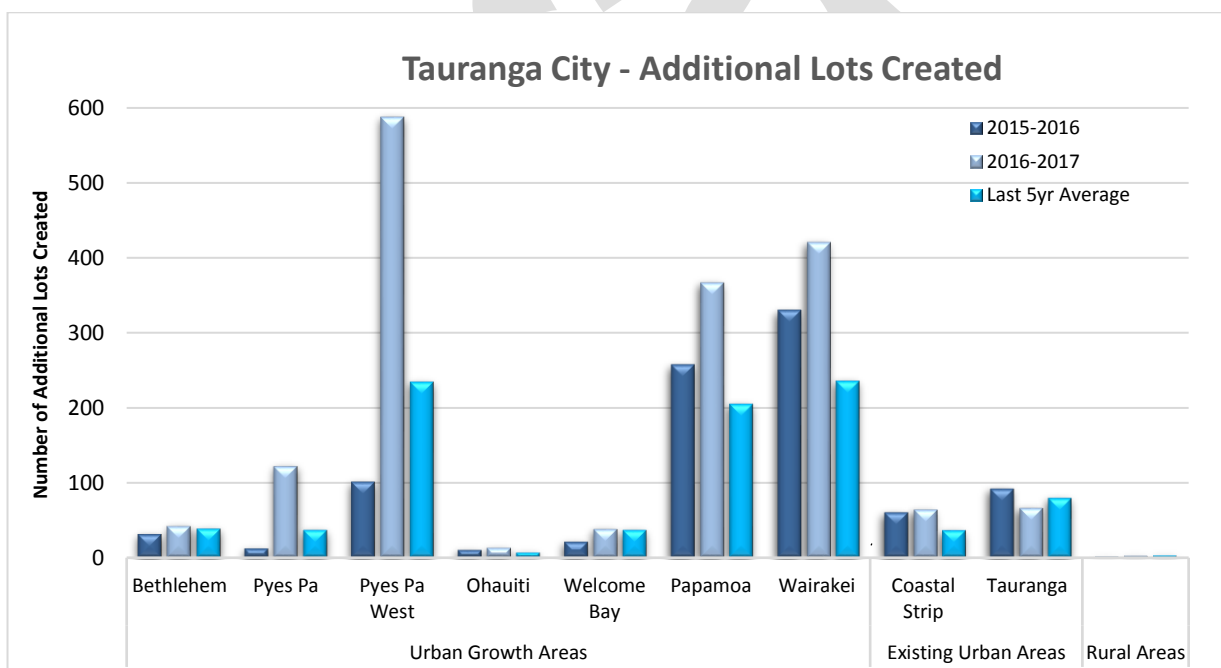
In WBOPD new lots created in the UGA's were the lowest in 2010/2011 with an average of 8 new lots created per quarter, compared the 63 new lots created in 2016/2017. The number of new lots created in urban areas increased from 162 in 2015/2016 to 253 in 2016/2017.

For Tauranga City new lots created in 2016/2017 (1,723 new lots created) increased significantly by 809 lots (+89%) from 2015/2016 (914 new lots created). 2016/2017 results were 91% higher than the last 5 year average of 903 new lots created. Over the last ten years, new lots created were the lowest in 2011/2012 with an average of 9 new lots created, compared to 143 new lots created in 2016/2017 in Tauranga City.



**Chart 6 Observation:**

In the Greenfield UGA's the number of additional lots created at 224 stage increased by 63% from 2015/2016 to 2016/2017 and the rural areas increased by 44% for the same period. Subdivision is lower in Waihi Beach and Katikati while in Omokoroa and Te Puke subdivision increased significantly for the 2016/2017 year. Additional lots created increased in most of the rural areas from 2015/2016 to 2016/2017 except for Waihi Beach/ Katikati rural areas where additional lots decreased by 17%.

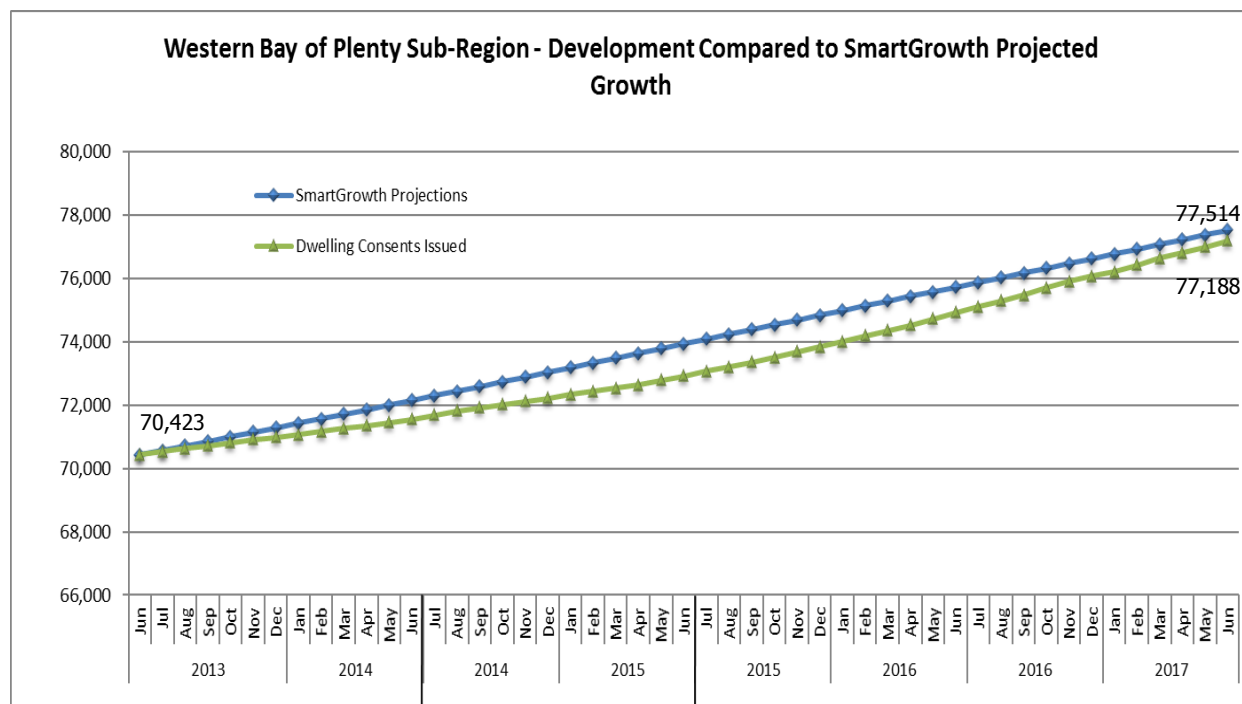


**Chart 7 Observation:**

The largest number of additional lots created during the 2016/2017 financial year were within Greenfield UGA's (1,591 lots or 92%), while 130 lots were created in existing urban areas. Subdivision development within all Greenfield UGA's increased in 2016/2017 in comparison with 2015/2016 results. In the existing urban areas Tauranga area decreased while Coastal Strip recorded an increase from 2015/2016 results in 2016/2017. During 2016/2017 most additional lots in Tauranga City were created within the Suburban and Wairakei residential zones (1,586 lots or 92%),

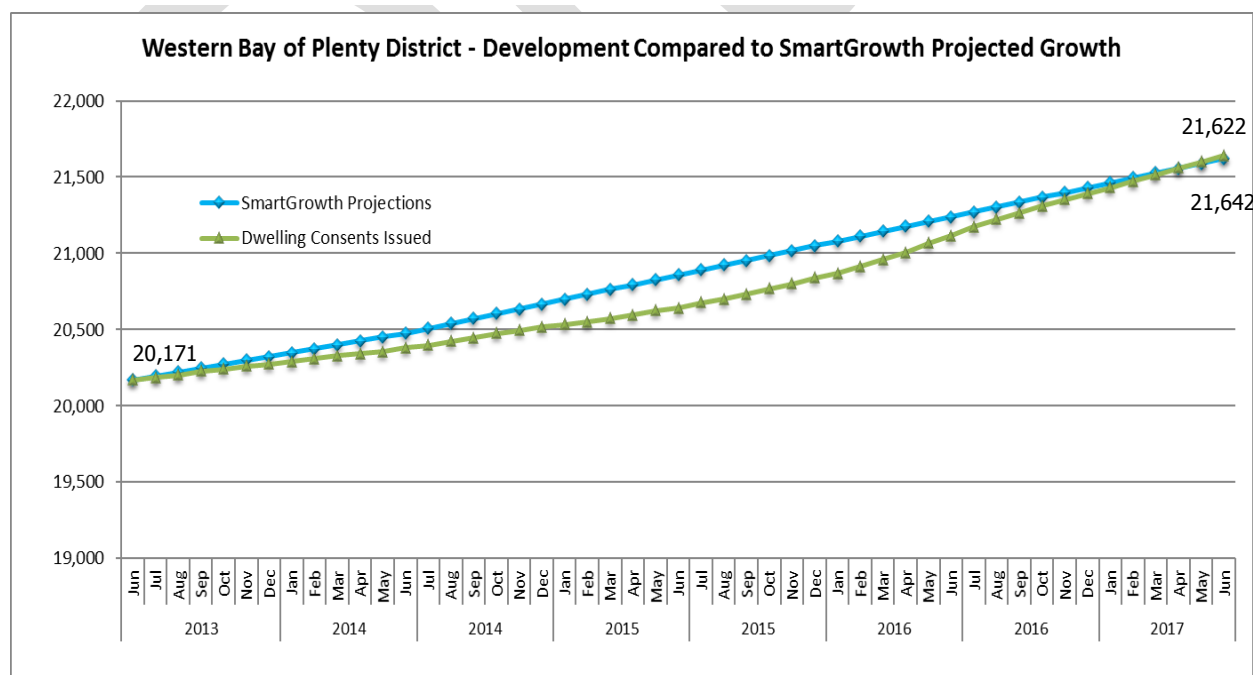
### 3.3 Comparison with SmartGrowth Projections

Detailed population and household projections have been produced for the SmartGrowth region by the National Institute of Demographic and Economic Analysis (NIDEA), University of Waikato<sup>3</sup>. NIDEA predict that population in the Western Bay of Plenty sub-region will increase from 165,910 people at 30 June 2013 to 261,248 people by 2063, while dwellings will increase from 70,423 to 129,997 over that period.



**Chart 8 Observation:**

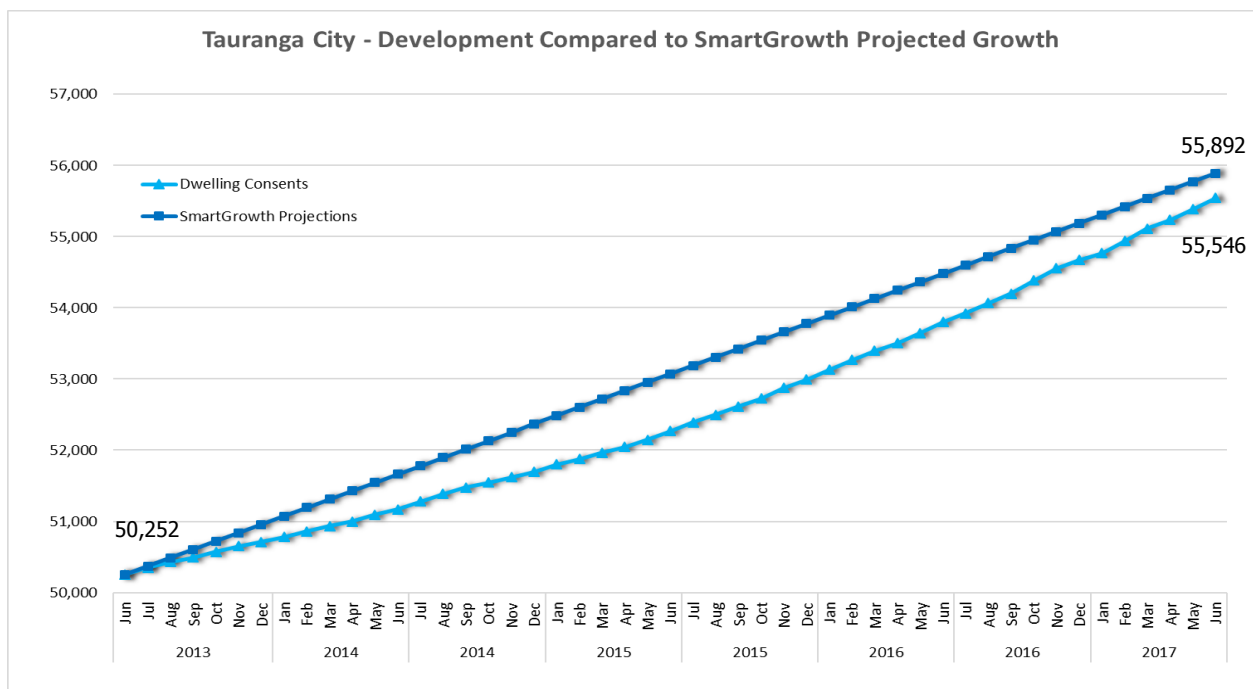
Dwelling Consents Issued for the Sub-region is very close to the dwellings projected. Between 1 July 2013 and 30 June 2017, 4.6% less new dwellings consents were issued, than projected.



**Chart 9 Observation:**

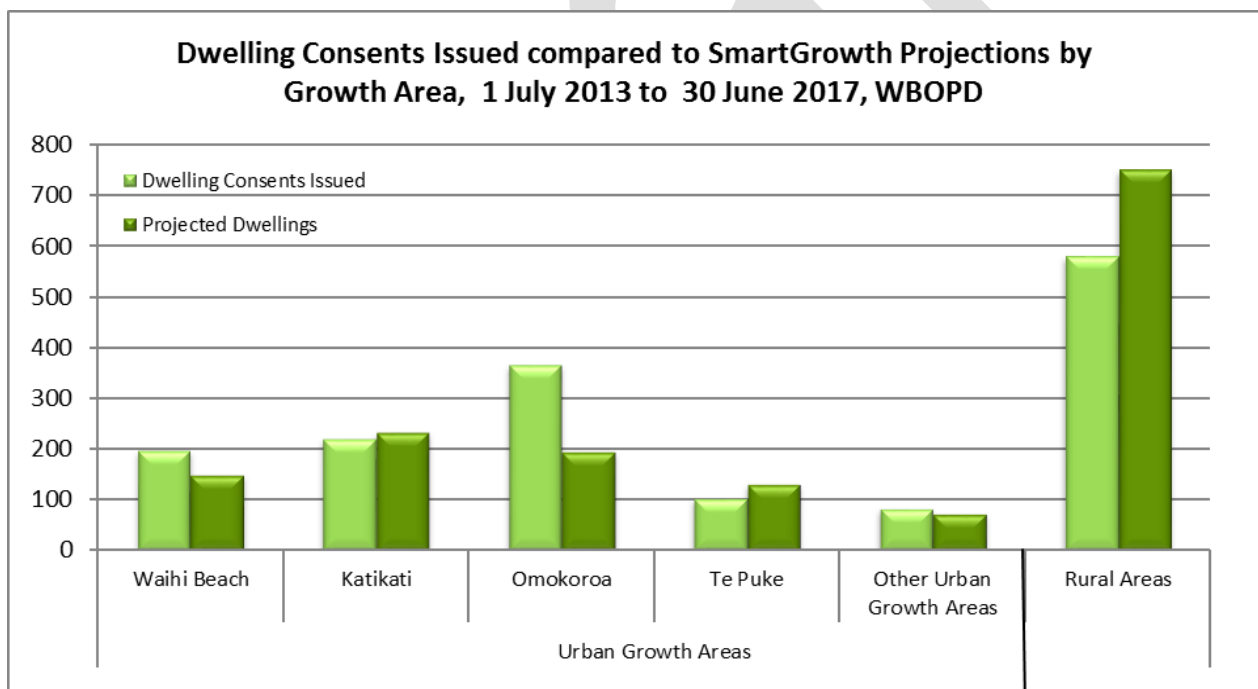
Dwelling consents issued between 1 July 2013 and 30 June 2017, were 20 more than the 1,451 dwellings projected for this period under the current SmartGrowth Projection.

<sup>3</sup> The revised projections were adopted by the SmartGrowth Committee on 28 May 2014 and updated by both Councils in July 2017.



**Chart 10 Observation:**

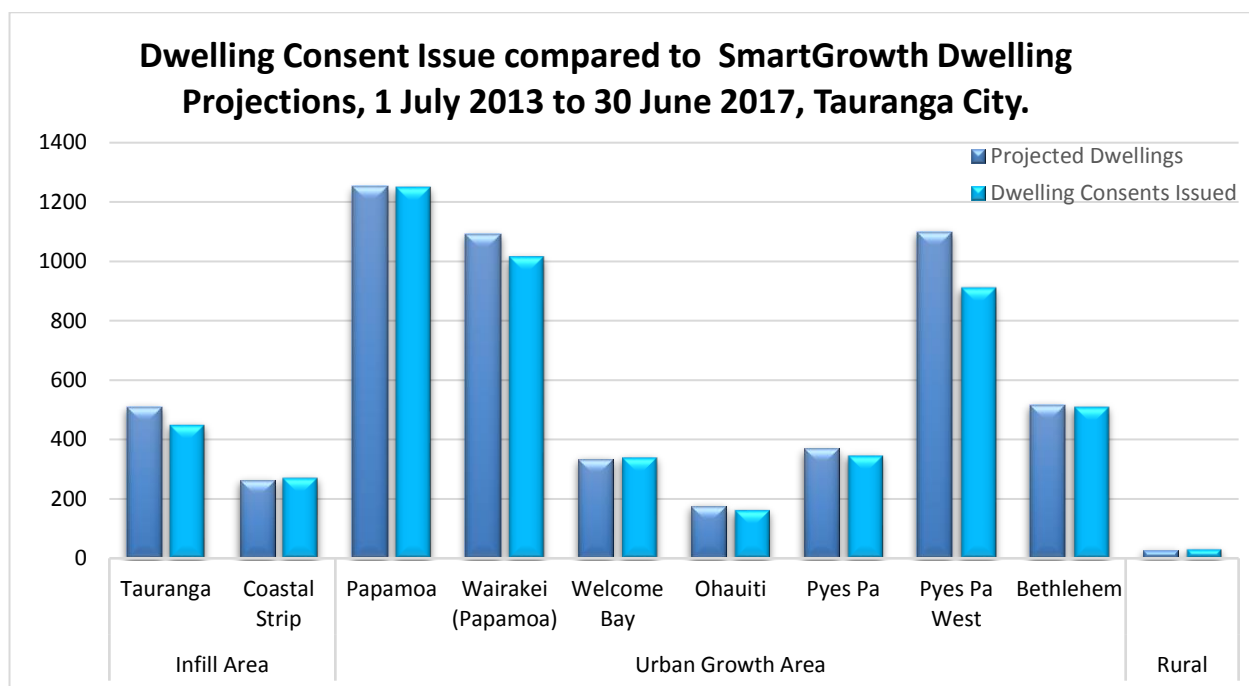
Between 1 July 2013 and 30 June 2017 346 (or 6%) less dwellings consents were issued than the 5,640 dwellings projected. It is expected that by the end of the 5 year projection period at 30 June 2018 that dwelling consent issue will be very close to dwellings projected based on recent trends.



**Chart 11 Observation:**

In Western Bay of Plenty District, Katikati UGA has more dwellings projected (232) than new dwelling consents issued (220) from July 2013 to June 2017 and in Te Puke UGA there were 27 more dwellings projected than dwelling consents issued (103) for the same period. The projections (753 dwellings) for the rural areas are much higher than the actual dwelling consents issued of 581 dwellings. The rural area units with more dwellings projected than built were in the Kaimai, Minden, Ohauiti-Ngapeke and Rangiuru area units.





**Chart 12 Observation:**

In comparison to the current SmartGrowth Projection allocation between 1 July 2013 and 30 June 2017 more dwelling consents were issued than projected in Welcome Bay UGA, while all other UGA's recorded less consents issued than projected. Overall dwelling consents issued in UGA's were 299 (or 4%) below the 4,839 dwellings projected. Dwelling consents issued in Intensification\ Infill area, and Rural areas were 47 below (or 6% less) the 801 projected.

It is noted that the projection is for a 5 year period with growth rates anticipated to increase particularly in Pyes Pa West and Wairakei UGA's in the latter part of the 5 year projection period. Accordingly greater alignment is expected between projected growth and actual dwelling consent counts by 30 June 2018.

### 3.4 Growth Rates – Land Availability

SmartGrowth requires that uptake rates and land availability for residential development be monitored. This is based on zoned residential land across the sub-region.

#### Tauranga City

Of the operative Greenfield UGA's, Pyes Pa UGA has the lowest percentage of remaining dwelling capacity (15%), while Welcome Bay has the lowest remaining dwelling capacity (343 dwellings), refer to Table 4.

Papamoa UGA which has the largest expected yield, has estimated potential for a further 2,065 dwellings. The majority of these are expected to be constructed in the Maranui Street area which includes the Mangatawa Block, and at the eastern end of Doncaster Drive in the Parton Road area.

Wairakei UGA in Papamoa East was made operative in May 2011, providing further capacity for an estimated 4,220 dwellings. At 30 June 2017 it had the largest remaining dwelling capacity (3,196 dwellings) and highest percentage of capacity remaining (76%).

Other Greenfield areas have been identified for future urban development and their suitability is currently being considered through the SmartGrowth Settlement Pattern Review Project. Te Tumu in Papamoa East and Tauriko West future Greenfield UGA areas are currently being progressed through structure planning.

**Table 4. Growth Rate of Urban Growth Areas in Tauranga City**

Urban Growth Area	Estimated Yield - Total Dwellings <sup>1</sup>	June 2013 Total Dwellings	Dwelling Consents Issued July 2013 -June 2017	Remaining Capacity	% Capacity Remaining
Bethlehem	4,890	2905	511	1,474	30%
Pyes Pa	2,780	2013	348	419	15%
Pyes Pa West	3,060	327	912	1,821	60%
Ohauti	1,800	1173	163	464	26%
Welcome Bay	2,150	1466	341	343	16%
Papamoa	12,040	8725	1,250	2,065	17%
Wairakei	4,220	9	1,015	3,196	76%
<b>Total</b>	<b>30,940</b>	<b>16,620</b>	<b>4,540</b>	<b>9,780</b>	<b>32%</b>

<sup>1</sup> Estimated Yields are currently being reviewed as part of the NPS-UDC capacity assessments which may result in adjustments. Approved Special Housing Areas in Bethlehem, Papamoa, Wairakei and Ohauti UGA's combined with greater density being achieved particularly through Retirement Village developments is generally increasing UGA yields.

## Western Bay of Plenty District

Te Puke UGA has the largest design capacity in the District followed by Waihi Beach UGA of just over 3,000 dwellings. Although Waihi Beach has a large design capacity, it has the lowest remaining capacity available of 9%. Omokoroa Stage 1&2 UGA has the largest dwelling capacity remaining in the District (1,080 dwellings), followed by Te Puke UGA with 510 dwellings. Katikati UGA does not include the Park Road dairy farm and Tetley Road orchard, and that leaves Katikati with only 300 dwellings remaining (refer to Table 5).

**Table 5. Growth Rate of Urban Growth Areas in the Western Bay of Plenty District**

<sup>1</sup> Exclude Park Road Dairy and Tetley Road Orchard.

Urban Growth Area	Total Capacity - Dwellings	June 2013 Total Dwellings	Dwelling Consents Issued July 2013 -June 2017	Remaining Capacity	% Capacity Remaining
Omokoroa – Stages 1 & 2	2663	1,228	355	1,080	41%
Katikati <sup>1</sup>	2380	1,886	194	300	13%
Waihi Beach	3230	2,766	184	280	9%
Te Puke	3550	2,940	100	510	14%
<b>Total</b>	<b>11,823</b>	<b>8,820</b>	<b>833</b>	<b>2,170</b>	<b>18%</b>

## 3.5 Occupied/Unoccupied Dwelling Ratio

SmartGrowth requires that “permanent” vs. “holiday residences” be monitored. A comparison of Census night occupied dwelling with unoccupied dwelling counts provides one indication of this. A table outlining occupied and unoccupied dwelling ratios is provided in Appendix 4 and a Census area unit map is provided in Appendix 5.

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## Western Bay of Plenty District

In the Western Bay of Plenty District the coastal settlements of Island View-Pios Beach and Waihi Beach show the highest ratios of unoccupied dwellings with 61% and 49% respectively signifying a high number of holiday homes in these areas, refer to Appendix 4.

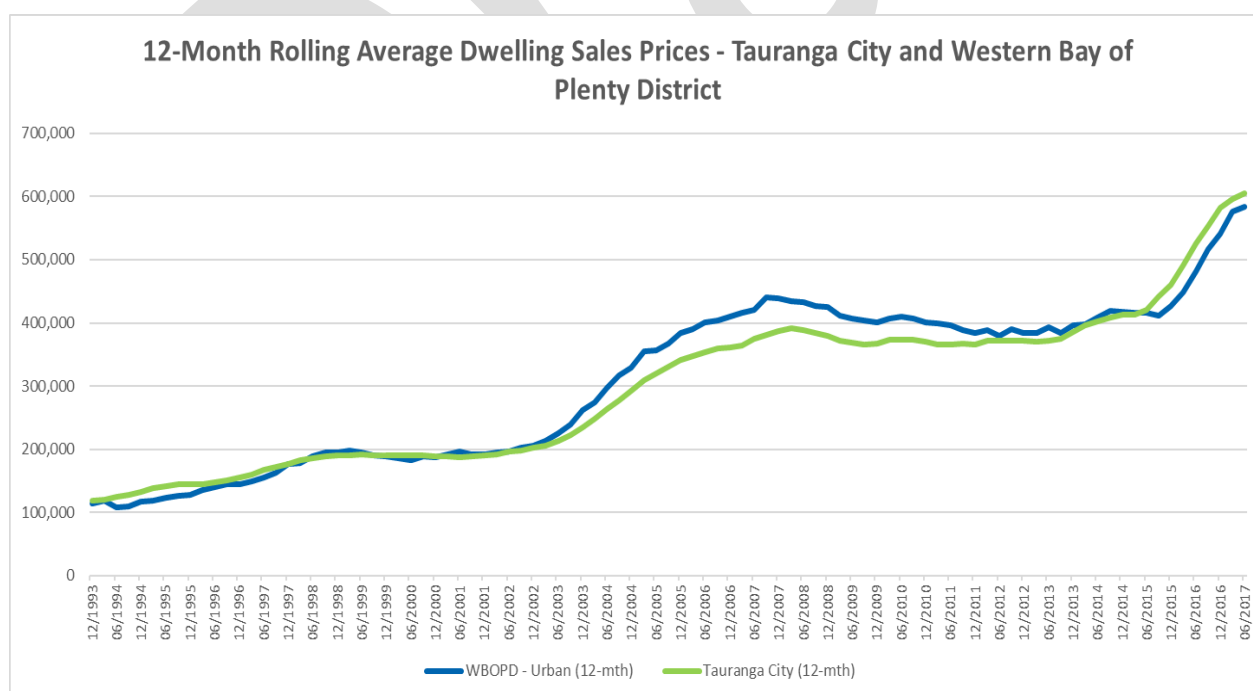
Athenree and Matakana Island also indicate a relatively high proportion of non-permanent residences, each with more than 25% of homes unoccupied at Census time. Pongakawa despite being a rural area displays a reasonably high proportion of unoccupied dwellings (31%) largely due to the inclusion of the coastal settlement of Pukehina within the area unit. Maketu Community (26%), another settlement located on the Western Bay of Plenty District's coast has a similar ratio of unoccupied dwellings to Pongakawa (31%), while Katikati and Omokoroa has a smaller proportion of non-permanent residences than other coastal settlements, with 9% and 12% respectively.

## Tauranga City

For Tauranga City the coastal strip Census area units of Mount Maunganui North, Omanu, Te Maunga, Papamoa Beach East, Palm Beach, and Palm Springs all registered an unoccupied dwellings proportion of 10% or greater on Census night suggesting a higher rate of holiday residence in these areas, refer to Appendix 4. These results correspond with the traditional holiday nature of the coastal strip. Outside the coastal strip only Tauranga Central, and Sulphur Point CAU's exceeded 10% unoccupied dwellings.

## 4 Dwelling Sale Price and Rent Trends

### 4.1 Dwelling Sales Price



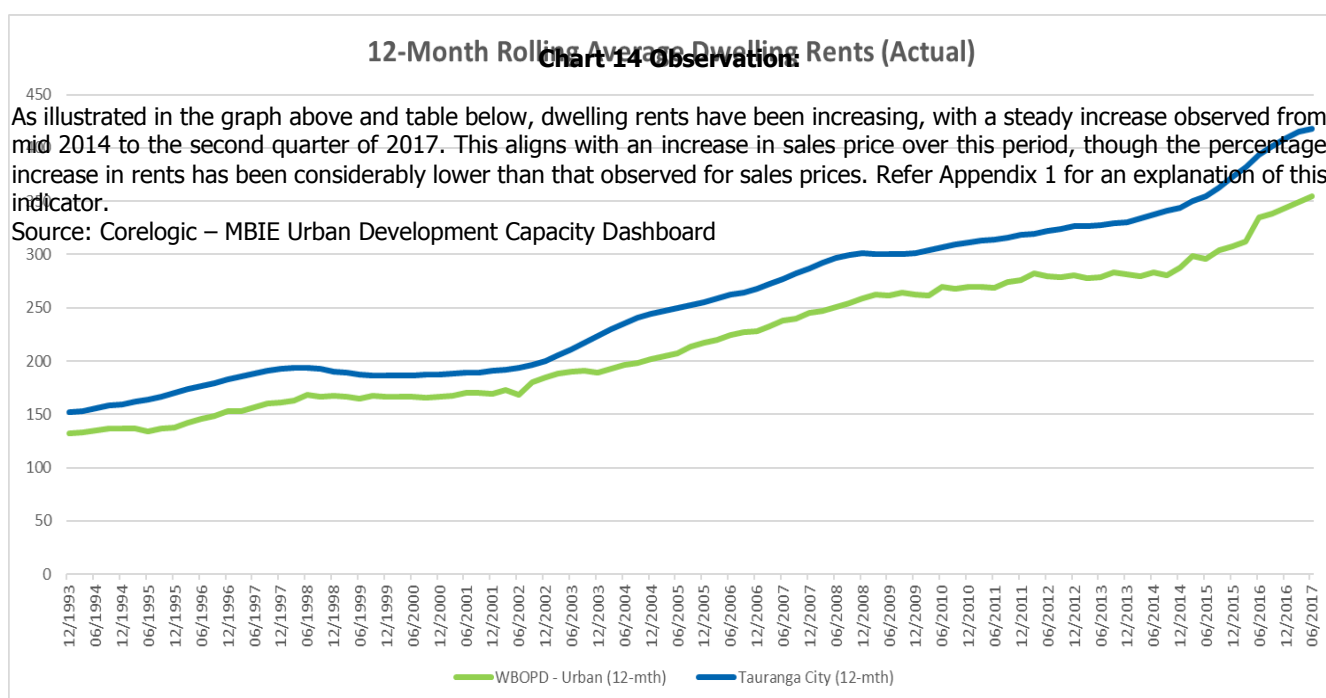
**Chart 13 Observation:**

As shown in the graph above and the table below both Tauranga City and Western Bay of Plenty District have experienced a significant increase in average median sales price in the 2016/2017 year. Refer Appendix 1 for an explanation of this indicator. Source: Corelogic – MBIE Urban Development Capacity Dashboard.

**Table 6. Dwelling Sales Prices**

	Median sale price (at 30/06/2017)	Last Quarter		Last 12 months		Last 5 Years		Last 10 Years	
		Change	% Change	Change	% Change	Change	% Change	Change	% Change
Tauranga City	\$605,750	\$9,875	1.7%	\$79,375	18.9%	\$233,313	62.6%	\$231,375	61.8%
Western BOP	\$584,509	\$8,339	1.4%	\$102,188	24.6%	\$205,111	54.1%	\$163,848	39.0%

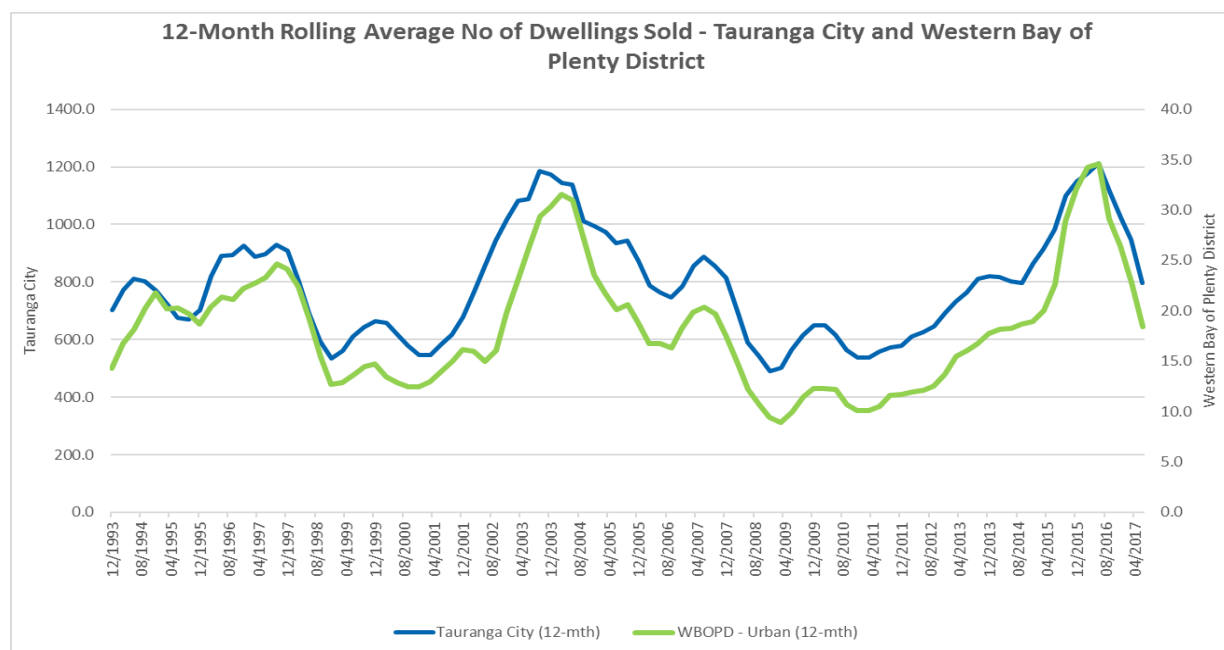
## 4.2 Dwelling Rents

**Table 7. Dwelling Rents**

	Mean Rent (at 30/06/2017)	Last Quarter		Last 12 months		Last 5 Years		Last 10 Years	
		Change	% Change	Change	% Change	Change	% Change	Change	% Change
Tauranga City	\$418	\$3	0.7%	\$25	6.9%	\$96	29.8%	\$142	51.3%
Western BOP	\$355	\$5	1.5%	\$20	6.8%	\$75	26.9%	\$117	49.0%



### 4.3 Dwellings Sold

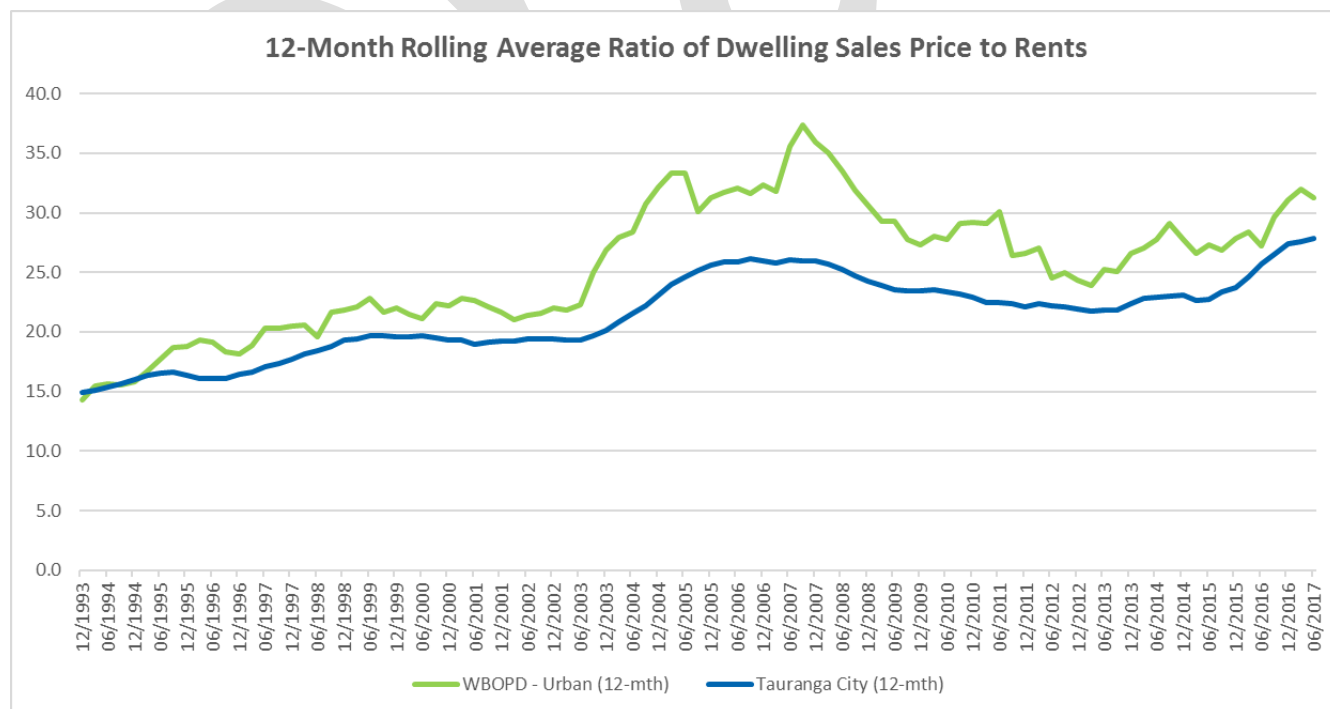


#### Chart 15 Observation:

As shown in the graph above Tauranga City and Western Bay of Plenty District have experienced significant fluctuations in the number of dwellings sold. While there is less variation observed it is noted that the number of sales has doubled in both areas in certain quarters from lowest to highest number of sales (eg: when 2004 and 2016 (high sales) are compared with 2001 and 2009 (low sales)). Tauranga City and WBOP District follow similar trends in respect to periods of higher and lower sales. Refer Appendix 1 for an explanation of this indicator.

Source: Corelogic – MBIE Urban Development Capacity Dashboard.

### 4.4 Ratio of Dwelling Sales Prices to Rent



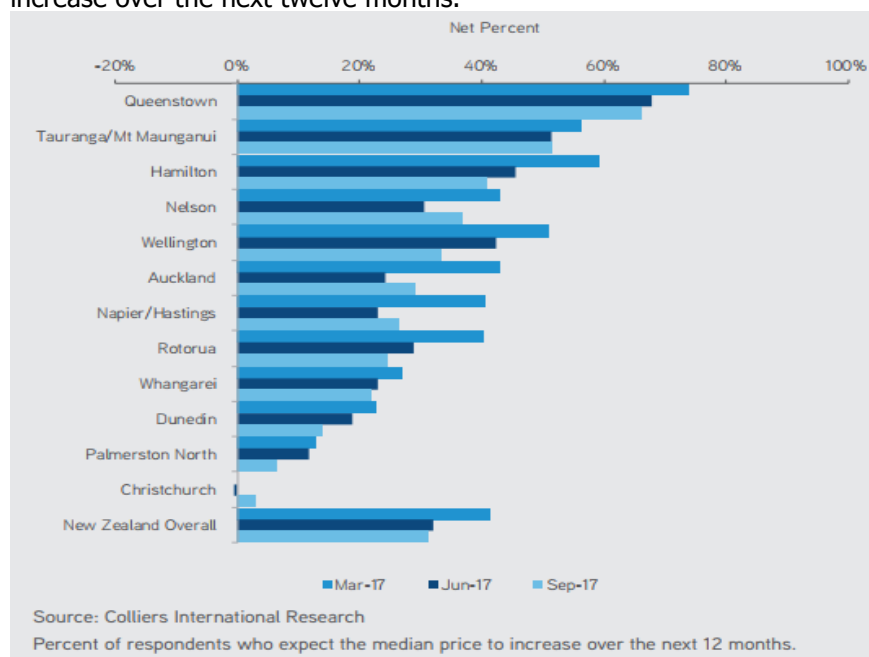
#### Chart 16 Observation:

As illustrated in the above graph, the ratios between house prices and rents increased in the urban areas of both local authorities between 2003 and 2008 and in the last few years (but fell noticeably for a few years following the global financial crisis). According to the MBIE/MfE Guide, this is because, while both house prices and rents have increased over the last 20 years, rent increases have been flatter and have lagged house price increases, and especially so at the peaks of the cycle. Refer Appendix 1 for an explanation of this indicator.

Source: Corelogic – MBIE Urban Development Capacity Dashboard

## 4.5 Residential Market Outlook

Colliers International runs a quarterly survey on Residential Market Outlook in a number of centres in New Zealand. In their June and September 2017 surveys, more than 50% of the respondents (net percent of optimists minus pessimists) in Tauranga and Mt Maunganui expect the median residential price to increase over the next twelve months.

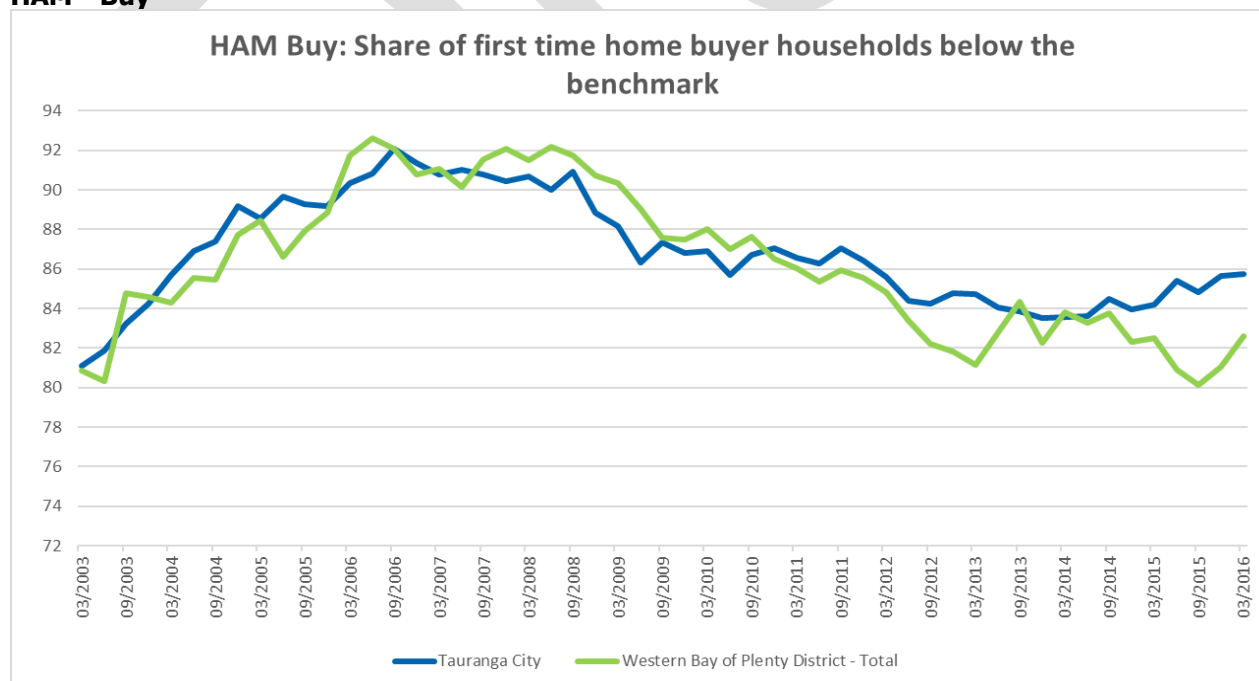


**Chart 17 Observation:**

As illustrated in the graph Tauranga/ Mt Maunganui was second only to Queenstown of the centres surveyed expecting residential prices to increase as at June 2017. This expectation increased in the last quarter to September 2017.

## 4.6 HAM – Housing Affordability Measure

### HAM - Buy



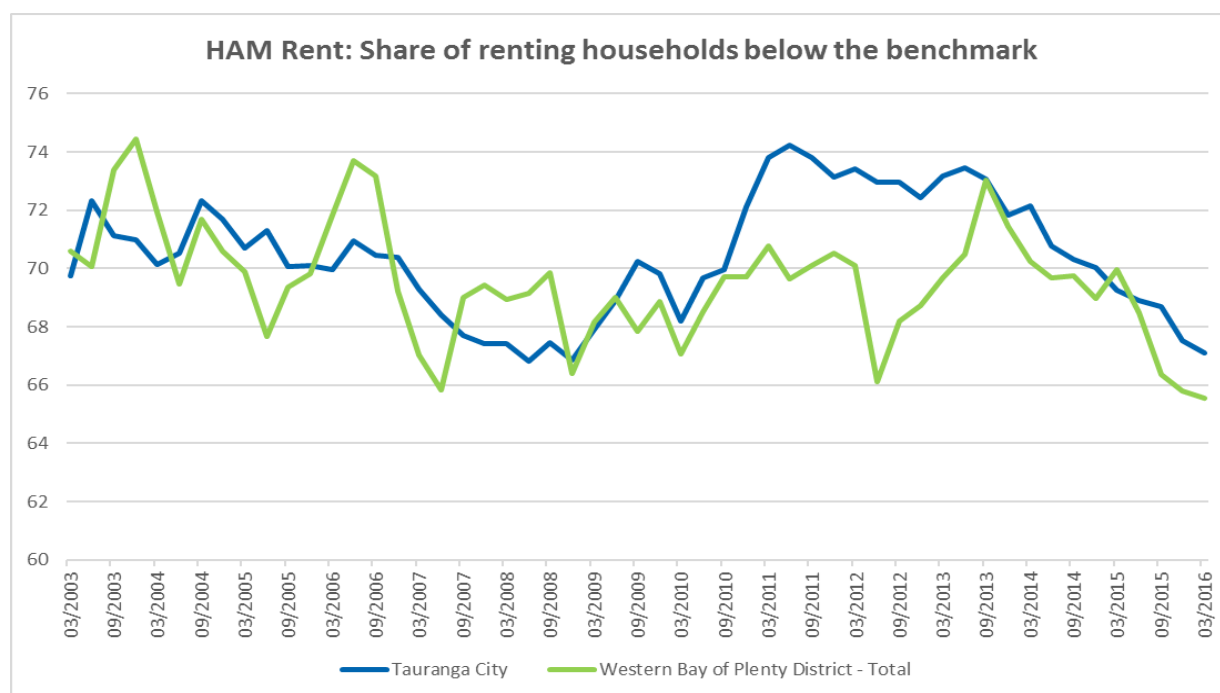
**Chart 18 Observation:**

As illustrated in the graph above and table below, over the quarter and twelve months to 31 March 2016 affordability had improved in Western Bay of Plenty District, while slightly worsened in Tauranga City. However because of the age of this data the measure is not currently picking up the rapid house price inflation that has occurred in the last 1.5 years. As such it may not be an accurate representation of current affordability levels. Refer Appendix 1 for an explanation of this indicator.

Source: Corelogic – MBIE Urban Development Capacity Dashboard.

**Table 8. HAM Buy**

	HAM Buy at 31/3/16	Last Quarter		Last 12 months		Last 5 Years		Last 10 Years	
		Change	% Change	Change	% Change	Change	% Change	Change	% Change
Tauranga City	85.7	0.1	0.1%	1.6	1.9%	0.1	0.2%	-4.6	-5.1%
Western BOP	82.6	1.5	1.9%	0.1	0.1%	-2.2	-2.6%	-9.2	-10.0%

**HAM - Rent****Chart 19 Observation:**

As illustrated in the graph above and table below, the HAM Rent has improved in both local authority areas in the last 12 months, while worsened slightly in Tauranga City in the last quarter, to 31 March 2016. The HAM Rent was lower than HAM Buy at 31 March 2016 in both Tauranga City and WBOP District, suggesting that it was more affordable to rent than buy. Refer Appendix 1 for an explanation of this indicator.

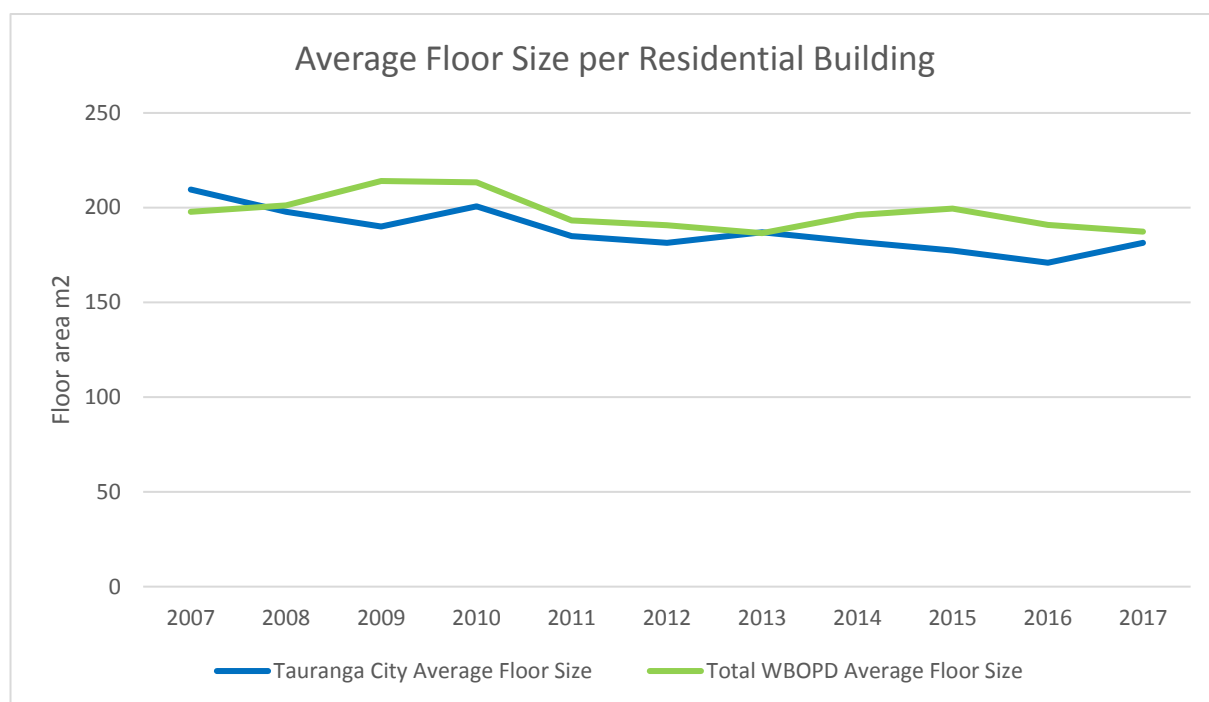
Source: Corelogic – MBIE Urban Development Capacity Dashboard.

**Table 9. HAM Rent**

	HAM Rent at 31/3/16	Last Quarter		Last 12 months		Last 5 Years		Last 10 Years	
		Change	% Change	Change	% Change	Change	% Change	Change	% Change
Tauranga City	67.1	-0.4	-0.6%	-2.1	-3.1%	-6.3	-8.6%	-2.8	-4.1%
Western BOP	65.5	-0.3	-0.4%	-4.4	-6.3%	-4.6	-6.5%	-6.3	-8.8%

## 5 Dwelling Typology

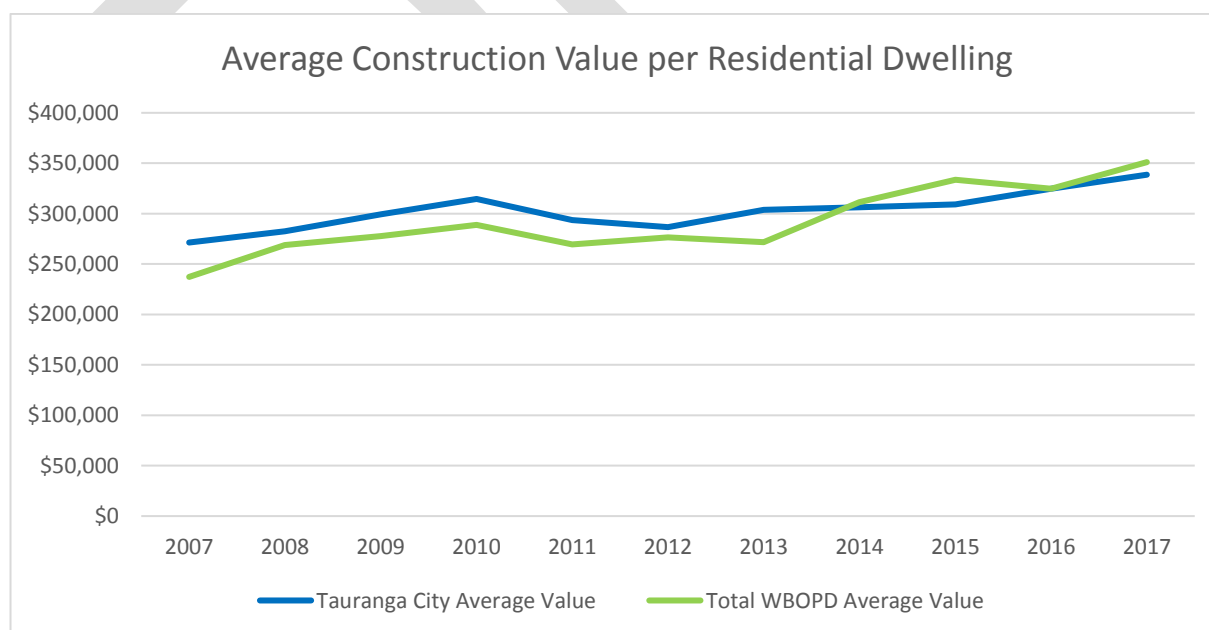
### 5.1 Floor Size per Residential Building



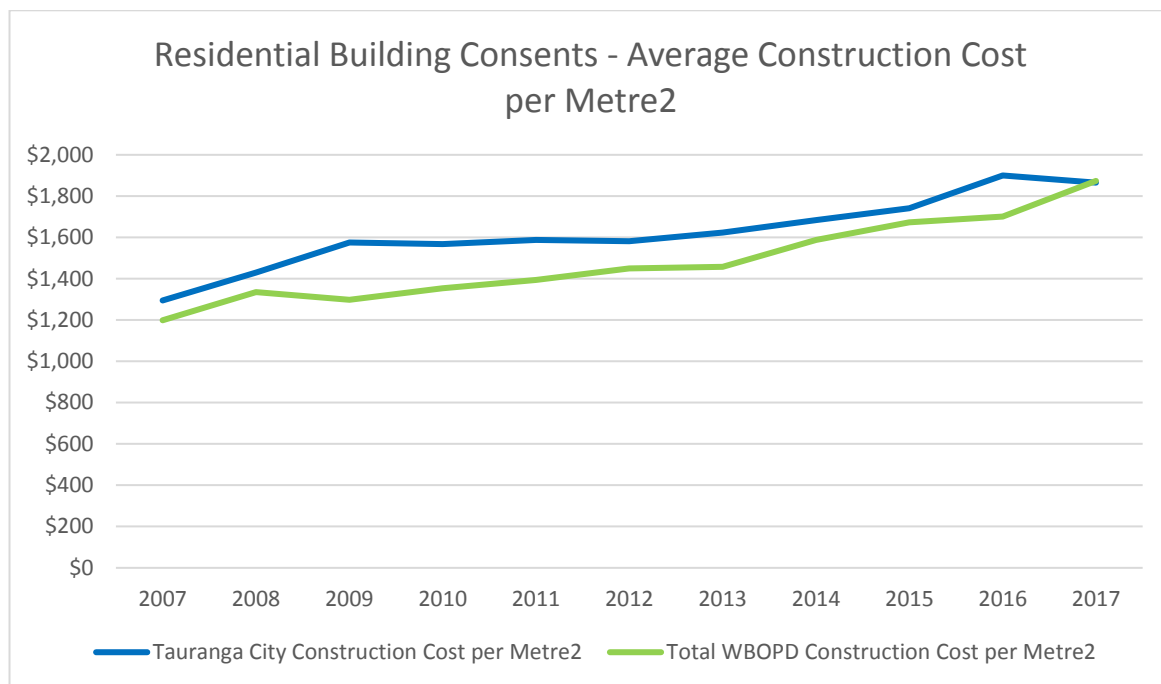
#### Chart 20 Observation:

Average floor area has declined from 2007 to 30 June 2017 for both local authority areas with variation over this period as illustrated in the above graph. In the last 12 months to June 2017 average floor area for residential dwelling consents has increased in Tauranga City from 171m² to 181m², while the WBOPD average floor area decreased from 191m² to 187m². Source: Stats NZ Infoshare

### 5.2 Construction Value per Residential Dwelling



Source: Stats NZ Infoshare

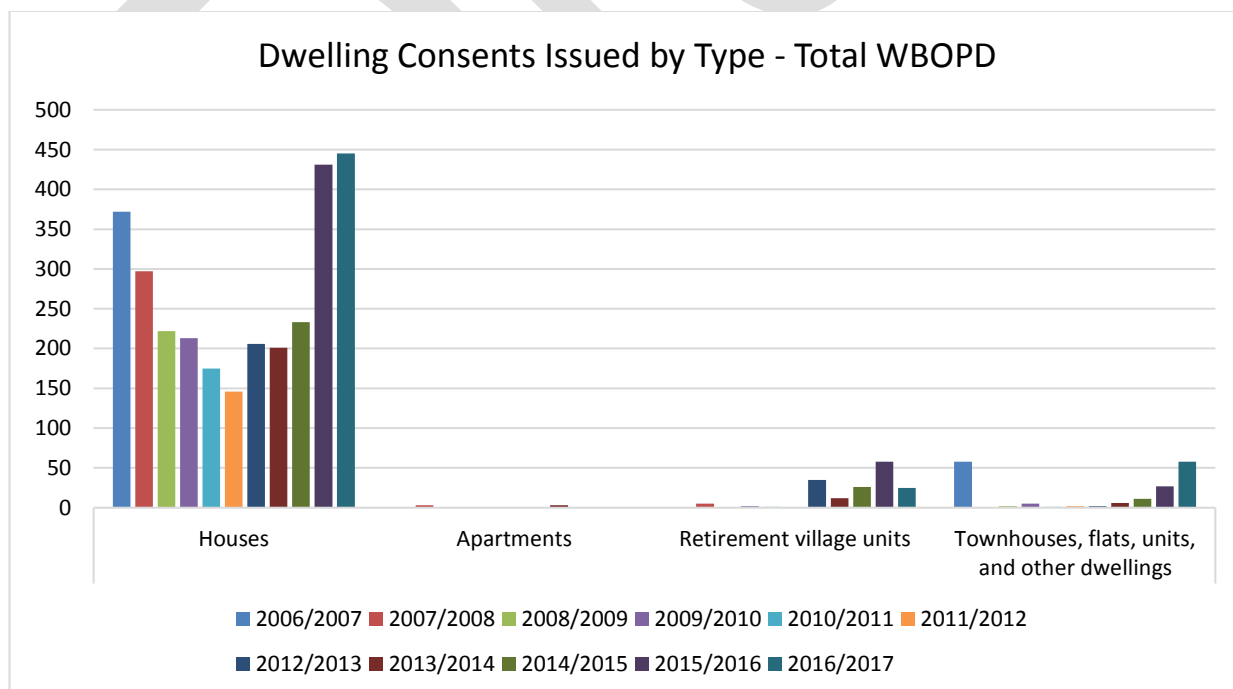


#### Charts 21 Observation:

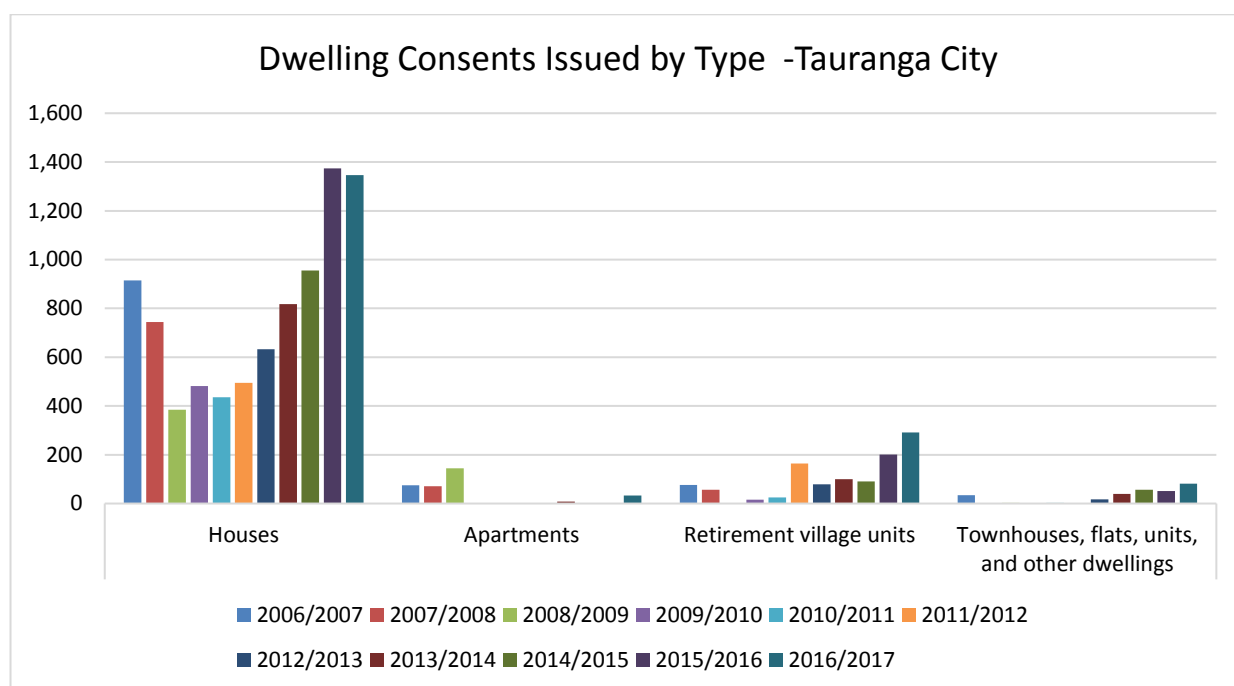
Average value per residential dwelling has increased in both local authority areas from 2007 to June 2017. There have been fluctuations experienced over this 10 year period as illustrated in the above graphs. This value excludes land costs associated with new houses.

Source: Statistics NZ Info Share

### 5.3 Dwelling Consents Issued by Type







#### Charts 22 Observation:

As illustrated in the graph above and table below the proportion of standalone houses has decreased in both Tauranga City and WBOPD in the last 12 months, compared to the last 5 year results though remain the main form of dwelling provision. Retirement village units were the next largest type of dwellings consented in Tauranga City in the last 12 months, while it was the townhouses, flats, units and other dwellings type in the WBOPD.

Source: Statistics NZ Info Share

**Table 10. DwellingType**

		Houses	Apartments	Retirement village units	Townhouses, flats, units, and other dwellings
Last 12 months	Tauranga City	76.9%	1.9%	16.6%	4.6%
	WBOPD	84.3%	0.0%	4.7%	11.0%
Last 5 Years	Tauranga City	83.0%	0.7%	12.3%	4.0%
	WBOPD	85.2%	0.2%	8.8%	5.8%

Source: Statistics NZ Info Share

## 6 Business Land Trends

### 6.1 Zoned Business Land

SmartGrowth and the Regional Policy Statement (operative and proposed RPS) require that business land area, uptake rates and land availability be monitored in the sub-region. This is done by using zoned land as the basis for the assessment.

#### 6.1.1 Commercial Zoned Land

##### Tauranga City

As at January 2017, there was 278.4 hectares of Commercial zoned land in Tauranga City. The two Parton Road commercial areas in Papamoa combined provide the largest area of 'Commercial' zoning at 39.3 ha, 2.6 ha greater in area than the Central Business District (CBD) in Tauranga Central, refer to Table 11. Smaller neighbourhood centres include Cherrywood, Bureta, and Welcome Bay. Supermarket based neighbourhood shopping centres include Bayfair, Bethlehem, Brookfield and Gate Pa. A new large shopping centre has opened at Tauriko near the State Highway 29/36 intersection (Tauranga Crossing).

Future rezoning of land for commercial business activity is planned in Te Tumu in Papamoa East. Te Tumu is proposed to be released for both business and residential development in the latter part of the 2018-2023 planning period. A map of Commercial zoned areas is provided in Appendix 7.

**Table 11. Operative and Future Commercial Zoned Land in Tauranga City**

Location	Commercial Land (Ha)	
	Operative	Future
Bay Central	8.7	
CBD	36.7	
Eleventh Avenue	16.2	
Greerton	6.2	
Gate Pa	4.7	
Fraser Cove	21.7	
Bel	<sup>1</sup> The Te Tumu figure is preliminary. It is anticipated that the 60.3 ha of future Te Tumu employment land classified in Table 14 as Industrial will also provide for some commercial activity. <sup>2</sup> Includes smaller parcels of Commercial zoned land which generally accommodate convenience type activities (dairies, takeaways etc) such as those areas located on Cambridge and Ohauiti roads.	
Br		
Pal		
Fa		
Mo		
Ba		
On		
Central Parade	1.3	
Cherrywood	0.7	
Historic Village	6.2	
Welcome Bay	1.1	
Tauriko	13.5	
Bureta	0.5	
15 <sup>th</sup> Avenue	3.6	
Parton Road (2 areas)	39.3	
Judea	2.7	
Wairakei Town Centre	27.0	
Wairakei Neighbourhood Centres	6.6	
Te Tumu <sup>1</sup>		1.4
Other <sup>2</sup>	31.2	
<b>Total</b>	<b>278.4</b>	<b>1.4</b>

Of Tauranga City's Greenfield UGA's, vacant land was identified within the Bethlehem, Pyes Pa West/ Tauriko, Papamoa (Palm Beach and Parton Road) and Papamoa East (Wairakei) commercial zoned areas, refer to Table 12.

**Table 12. Uptake of Commercial Zoned Land in Tauranga City**

Urban Growth Area Commercial Centres <sup>1</sup>	Area Zoned Commercial (ha)	Vacant Commercial Zoned Land (ha)	Percentage (%) Vacant
Bethlehem	9.36	0.39	4
Papamoa - Palm Beach	8.55	1.73	20
Papamoa - Parton Road <sup>2</sup>	39.28	10.07	26
Pyes Pa West - Tauriko	13.51	6.28	47
Papamoa East - Wairakei	33.6	33.6	100
<b>Total</b>	<b>104.3</b>	<b>52.1</b>	<b>50</b>

<sup>1</sup>As at January 2017. Only Commercial zoned areas with remaining vacant land in Greenfield UGAs are included in this survey.

<sup>2</sup> The occupied area at Parton Road commercial area includes a retirement home (7.4 ha), a stormwater pond (2.8 ha), and a camp ground (1.2 ha). A number of housing developments have recently been approved and are currently under construction in this area.

## Western Bay Of Plenty

Omokoroa has the largest commercial zoned land in Western Bay of Plenty District. The second largest areas of zoned commercial land are located in the urban areas of Te Puke and Katikati with 14.8 ha and 12.7 ha respectively, refer to Table 13. In Waihi Beach the 7.39 ha of commercial land, largely consists of the Wilson Road shopping centre and an additional 1.53 ha is zoned for future commercial purposes.

Smaller neighborhood centres are located in Te Puna and Paengaroa. Other settlements in the District such as Athenree, Island View/Pios Beach, Minden, Pukehina and Maketu are serviced by comparatively small commercial areas up to 3 ha in size.

**Table 13. Operative and Future Commercial Zoned Land in the Western Bay of Plenty District**

Location	Commercial Land (ha)	
	Operative	Future <sup>1</sup>
Waihi Beach	7.39	1.53
Athenree	0.40	
Island View-Pios Beach	0.12	
Katikati	12.74	1.46
Omokoroa	16.99	
Minden	2.21	
Te Puna	3.10	
Te Puke	14.76	
Pukehina	0.43	
Maketu	0.87	
Paengaroa	2.15	
<b>Total</b>	<b>61.16</b>	<b>14.53</b>

<sup>1</sup> Future Commercial zoned land is located in Waihi Beach and Katikati.

## 6.1.2 Availability and Uptake of Industrial Zoned Land

### Tauranga City

For Tauranga City, the largest area of industrial zoning is at Mount Maunganui, while the smallest area is at Sulphur Point, refer to Table 14 and Appendix 4. In May 2011 rezoning of 101.1 hectares of land for industrial purposes (Papamoa East Employment zone) was made operative at Wairakei in Papamoa East. It is currently proposed that a large proportion of employment land at Wairakei be rezoned for residential activity following approval of a number of Special Housing Area's under the Housing Accord and Special Housing Area legislation in this locality. This will reduce the employment land by 58.6 hectares to 48.5 hectares. It is expected that loss of employment land at Wairakei will largely be provided for in the future Te Tumu urban growth area.

**Table 14. Operative and Future Industrial Zoned Land in Tauranga City**

Location	Industrial Land (Ha)	
	Operative	Future
Judea	23.7	
Mt Maunganui	268.0	
Greerton	12.3	
Oropi (Maleme St)	49.5	
Owens Place	6.1	
Sulphur Point	3.0	
Port Industrial	190.7	
Te Maunga	174.6	
Tauriko	256.1	
Wairakei	42.5	
Te Tumu <sup>1</sup>		60.3
<b>Total</b>	<b>1026.6</b>	<b>60.3</b>

<sup>1</sup>The Te Tumu figure is preliminary. It is anticipated that the 60.3 ha of future Te Tumu employment land classified in Table 14 as Industrial will also provide for some commercial activity.

**Table 15. Uptake of Industrial Zoned Land in Tauranga City (as at January 2017)**

Area	Vacant (ha) <sup>1</sup>	Partially Vacant (ha)	Total Vacant	Vacant but Not Available (ha)	Partially Vacant but Not Available	Occupied (ha)	Total Occupied (ha)	Total Area (ha) <sup>3</sup>
<b>General Industrial Zoned Land<sup>2</sup></b>								
Judea	0.00	0.00	0.00	0.00	3.26	20.46	23.72	23.72
Mt Maunganui	12.50	9.61	22.11	0.82	0.00	245.04	245.86	267.96
Oropi	0.06	0.00	0.06	0.59	6.16	42.65	49.40	49.46
Greerton	0.33	0.53	0.86	0.00	0.00	11.43	11.43	12.28
Sulphur Point	0.18	0.00	0.18	0.06	0.00	2.79	2.85	3.03
Te Maunga	54.05	0.00	54.05	9.02	25.33	86.15	120.50	174.55
Owens Place	0.37	0.00	0.37	0.00	0.00	5.76	5.76	6.13
Tauriko	203.50	8.59	212.09	0.71	0.00	43.50	44.21	256.29
Wairakei <sup>4</sup>	42.48	0	42.48	0	0	0	0	42.48
<b>Total</b>	<b>313.47</b>	<b>18.72</b>	<b>332.19</b>	<b>11.2</b>	<b>34.75</b>	<b>457.77</b>	<b>562.30</b>	<b>835.90</b>
<b>Port Industry Zone<sup>3</sup></b>								
Within Port Security Fence	0.58	0.00	0.58	0.00	0.00	156.56	156.56	157.14
Outside Port Security Fence	0.95	5.81	6.76	0.00	0.00	26.82	26.82	33.57
<b>Total</b>	<b>1.53</b>	<b>5.81</b>	<b>7.34</b>	<b>0.00</b>	<b>0.00</b>	<b>183.38</b>	<b>183.38</b>	<b>190.71</b>

<sup>1</sup> "Vacant" no structures and are largely clear of plant and material. "Partially Vacant" - up to and including 50% of the land contains structures, plant or material. "Not available" - land that is unsuitable or not available for development, due to being on unusable terrain, or designated for reserves, stormwater or future wastewater treatment use. "Occupied" - over 50% of the land contains structures, plant or material.

<sup>2</sup> General Industrial zoned land includes land zoned Tauriko Industry, Industry, and Papamoa East Employment. The next industrial land survey is programmed for January 2018. <sup>3</sup> Port Industry Zone land is surveyed separately as the majority of this zone applies to the Port of Tauranga which is not accessible for survey, and its function varies from the general industrial areas.

<sup>4</sup> 58.58 ha of Wairakei Employment land was rezoned to Wairakei Residential zone via Tauranga City Plan Change 25 (deemed operative September 2017 – formal resolution to Council December 2017).

In Tauranga City's general industrial zoned areas vacant land was identified at all industrial areas except Judea - refer to Table 15. Overall 40% (or 332.2 hectares) of the 835.9 hectares of zoned industrial land in Tauranga City was vacant as at January 2017, with 64% (or 212.1 hectares) of this vacant land located at Tauriko industrial area.

In the Port Industry zone 4% (or 7.3 hectares) of the 190.7 hectares of Port Industry zoned land was vacant as at January 2017.

It is noted that while 332.9 hectares is identified as vacant and theoretically “available” for industrial activity the development of certain industrial land is reliant on the provision of key infrastructure and/or works. The release of future stages at Tauriko requires completion of stormwater ponds and a number of roading projects. Development of industrial land at Wairakei requires construction of Te Okuroa Drive, and the completion of other key infrastructure projects. Te Maunga is subject to flood hazard in certain areas which may require substantial earthworks to raise building platforms depending on the industrial use proposed. A significant amount of zoned industrial land in Greenfield industrial areas will also be lost to road reserves as these areas are developed in the future (approximately 25% of undeveloped land is usually taken up by roads/local services).

### Western Bay of Plenty District

The town in the Western Bay of Plenty District with the largest amount of Industrial land is Te Puke with 270 ha zoned, refer to Table 16. In Te Puke West an additional 72 ha of Industrial land is zoned to meet future needs in the town and is expected to yield an additional 45 ha. Katikati also contains a significant area of Industrial land with 66.05 ha zoned at present. Omokoroa has been identified as an area that will require Industrial land and 28.34 ha has been identified in Stage 2 of the Omokoroa Structure Plan which is now operative.

In the western end of the District the Te Puna Rural Business Zone contains 30.58 ha while Rangioru in the eastern end contains 270.39 ha of Industrial land zoned in preparation for the Rangioru Business Park.

**Table 16. Operative and Future Industrial Zoned Land in the Western Bay of Plenty District**

Location	Industrial Land (ha)	
	Operative	Future
Katikati	66.05	
Waihi Beach	25.58	
Omokoroa	28.34	
Te Puna	30.58	
Te Puke	270.39	
Maketu	0.11	
Paengaroa	9.57	
Rangioru	270.39	
<b>Total</b>	<b>701.01</b>	<b>0.00</b>

Industrial land in Te Puke includes 72 Hectares from Plan Change 70 which is dependent on roading and infrastructure upgrades.

In the Western Bay of Plenty District, vacant areas of available (able to be built on now) industrial land exist in Katikati, Omokoroa, Te Puke, and Paengaroa. Of the 555.77 ha of industrial land in Western Bay of Plenty District, 26.6% is vacant of which the largest proportion is in Rangioru (81.9 ha) and a smaller proportion in Te Puke (29.3 ha).

**Table 17. Uptake of Industrial Zoned Land in the Western Bay of Plenty District**

Industrial Zone - 2017						
Area	Vacant (ha)	Partially Vacant (ha)	Total Vacant (ha)	Vacant - Not Available (ha)	Total Occupied (ha)	Total Area (ha)
Waihi Beach	0	0	0	25.56	0	25.56
Katikati	21	3.73	24.73	14.82	23.57	63.12
Te Puna	0	0	0	30.58	0	30.58
Omokoroa	20.26	6.64	26.9	0	2.7	29.6
Te Puke	23.51	5.8	29.31	63.56	61.08	153.95
Rangioru	81.92	0	81.92	157.87	29.04	268.83
Paengaroa	1.09	3.21	4.3	0	5.27	9.57
Maketu	0.11	0	0.11	0	0	0.11
<b>TOTAL</b>	<b>147.91</b>	<b>19.37</b>	<b>167.28</b>	<b>266.84</b>	<b>121.65</b>	<b>555.77</b>
<b>%</b>	<b>26.61%</b>	<b>3.49%</b>	<b>30.10%</b>	<b>48.01%</b>	<b>21.89%</b>	<b>100.00%</b>

## 6.2 Business Land/Population Ratio

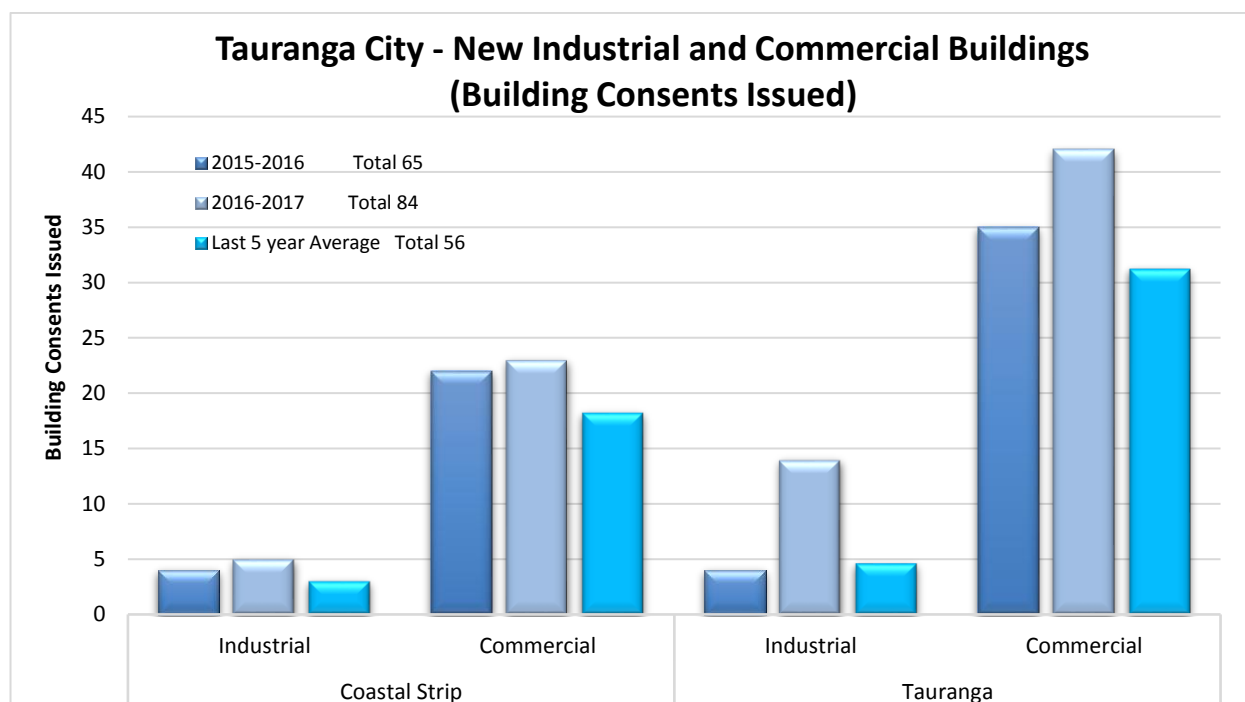
SmartGrowth requires that the business land/ population ratio be monitored, refer to Table 18. The 'business land' ratio has been split into "Industrial" and "Commercial" zoned land for 2006 and 2013. For the sub-region land zoned industrial is considerably higher in total to that zoned commercial resulting in more industrial land per resident reflecting the more expansive nature of this type of business activity.

**Table 18. Ratio of Industrial and Commercial Zoned Land per Person in the Western Bay of Plenty Sub region**

Year	Territorial Authority	Usually Resident Population Census	Industrial Land (ha)	Area (ha) Industrial Land per resident	Commercial Land (ha)	Area (ha) Commercial Land per resident
2006	Tauranga City	103,635	1028.08	0.0099	243.78	0.0024
	Western Bay of Plenty District	42,075	399.88	0.0095	52.84	0.0013
<b>2006 Total</b>		<b>145,710</b>	<b>1,427.96</b>	<b>0.0098</b>	<b>296.62</b>	<b>0.0020</b>
2013	Tauranga City	114,789	1026.61	0.0089	278.4	0.0025
	Western Bay of Plenty District	43,695	555.77	0.0127	61.16	0.0014
<b>2013 Total</b>		<b>158,484</b>	<b>1,582.38</b>	<b>0.0100</b>	<b>339.56</b>	<b>0.0021</b>



### 6.3 Industrial and Commercial Building Consents Issued



**Chart 23 Observation:**

Numbers of building consents issued for new industrial buildings and new commercial buildings increased in 2016/2017 in comparison with 2015/2016 results. New buildings consented for industrial activities in the Coastal Strip was 1 above 2016/2017 results while 2 above the 5 year average. The results for the Tauranga area were 10 above and 9 above respectively. New buildings consented for commercial activities in both the Coastal Strip and Tauranga area were higher than the previous year's result, and higher than the 5 year average.

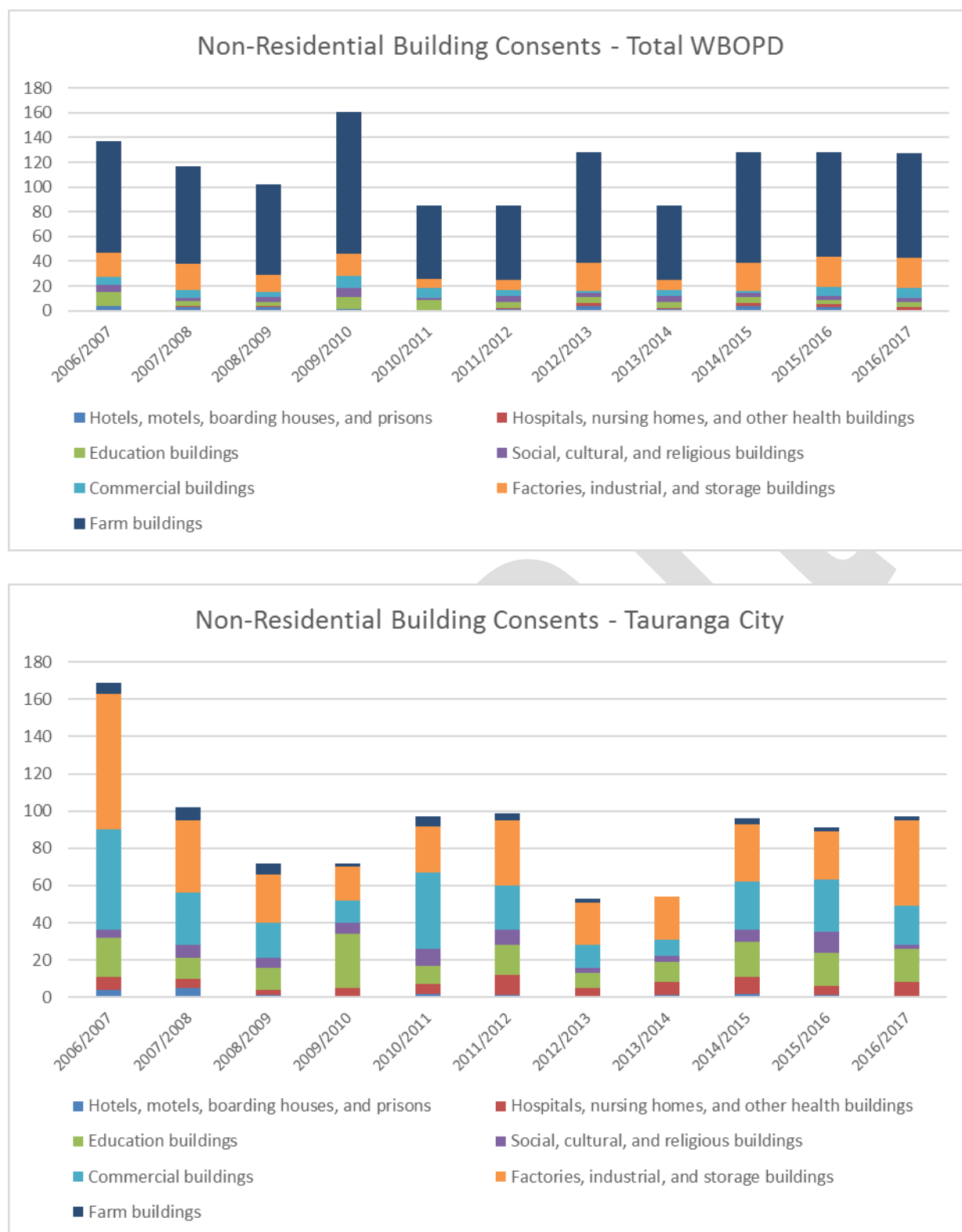
### Western Bay of Plenty District

Six new building consents were issued for industrial buildings and five for commercial buildings within the Western Bay of Plenty District over the 2016/2017 period.

**Table 19. Consents for Industrial and Commercial Buildings in the Western Bay of Plenty District**

Year	Industrial Building Consents	Commercial Building Consents
01/7/2006 - 30/6/2007	10	6
01/7/2007 - 30/6/2008	13	8
01/7/2008 - 30/6/2009	3	2
01/7/2009 - 30/6/2010	5	4
01/7/2010 - 30/6/2011	9	2
01/7/2011 - 30/6/2012	2	0
01/7/2012 - 30/6/2013	0	0
01/7/2013 - 30/6/2014	0	0
01/7/2014 - 30/6/2015	0	0
01/7/2015 - 30/6/2016	4	2
01/7/2016 - 30/6/2017	6	5
<b>5 Year Average</b>	<b>2.0</b>	<b>1.4</b>

## 6.4 Non-Residential Building Consents Issued by Type



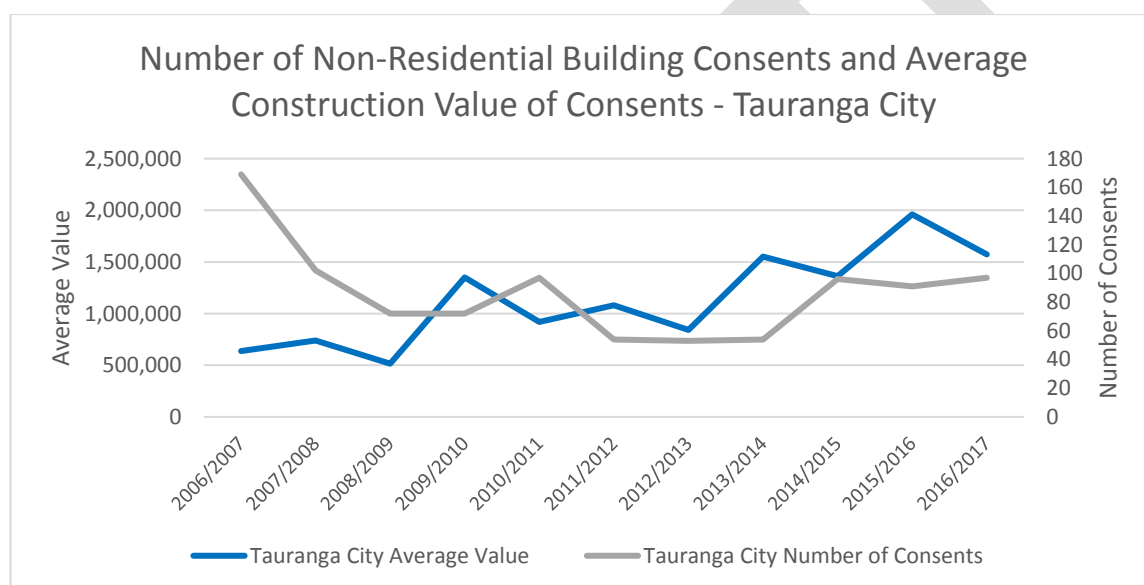
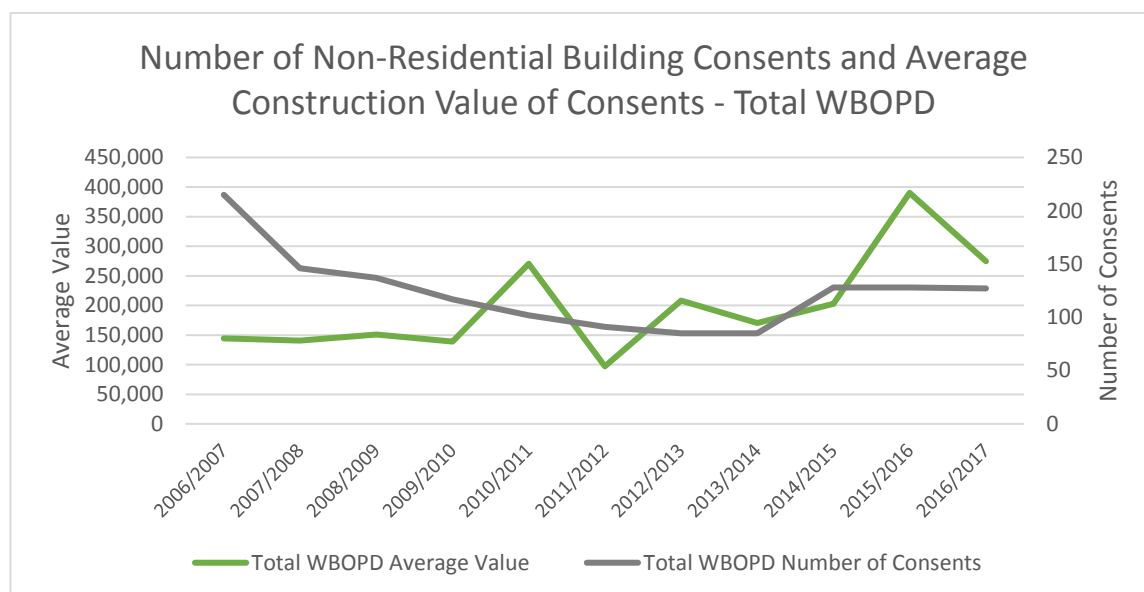
**Chart 24 Observation:**

As illustrated in the graphs above there is considerable variation between non-residential building consents issued in each local authority area. Building consents for Farm buildings are much higher in the WBOPD due to the more rural nature of activities in this area. In Tauranga City buildings associated with health, education, social/ cultural/ religious, business activities are most significant.

In both areas the number of building consents issued has been relatively high from July 2014 to June 2017.

Source: Statistics NZ Info

## 6.5 Non-Residential Building Consents by Construction Value



**Chart 25 Observation:**

As illustrated in the graphs above the change over time in total construction value and number of consents follows a similar trend line for both Tauranga City and WBOPD. A number of high value non-residential building consents has increased the total value above the number of consents from July 2014 to June 2017.

## 6.6 Industrial and CBD office market outlook

### 6.7.1 Tauranga Industrial Market

According to Collier's International the Tauranga industrial market currently has a record low vacancy, with the city's high population growth over the past few years. As such business confidence has become strong and the property market situation allowed investors to positively gear properties.

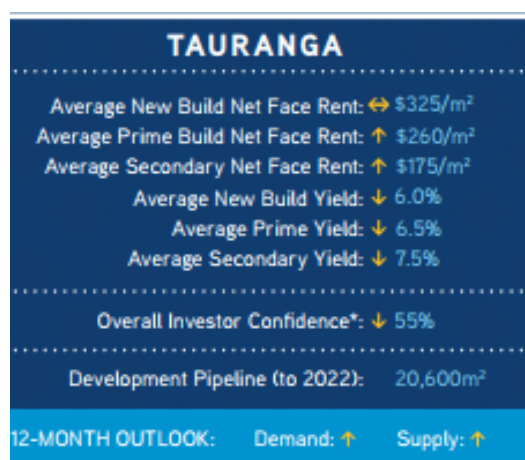
Further, construction on several industrial sites is set to commence at the Tauriko Business Estate. This is expected to provide more options for businesses who find it challenging to expand in the current tight conditions. The industrial stock insufficiency will likely push the rental growth on new builds and prime

grade premises upward over the next 12 months. On the other hand, rents on secondary grade premises are expected to get slightly lower as tenants and owners move into new premises.

After experiencing record low yields in the second half of 2016, yields have begun to soften by 25 to 50 basis points over the past 12 months. However, investor demand remains strong, in particular for prime properties, and yields are expected to remain steady over the next 12 months.

### 6.7.2 Tauranga CBD office market

In the September 2017 New Zealand CBD Office Report, Colliers International forecasts an improved demand and supply outlook for the Tauranga CBD office market for the next 12 months. Although the lack of available office stock continues to be a major constraint in the Tauranga CBD, the current development pipeline may lessen some of the demand pressures.



Source: Colliers International

Average net office rents in the CBD have risen to \$293 per sqm for new build/prime grade and \$175 per sqm for secondary grade on June 2017. Average new build/prime grade net office rents have increased by around \$20 per sqm and \$25 per sqm for secondary office space over the last year.

Over the last year, average new build/prime and secondary grade yields have firmed over 100 basis points. This is a reflection of Tauranga's strong investment demand driven by purchasers inside and outside the Tauranga market.

## 7 Future Monitoring Reports

As indicated in Section 2 of this report it is proposed that the SmartGrowth Development Trends report continue to report on key SmartGrowth, RPS and NPS-UDS indicators on an annual basis. For interim NPS-UDC quarterly monitoring a simpler reporting framework will be introduced.

The NPS-UDC under Policy PB7 requires indicators of price efficiency to be included in quarterly monitoring. Price efficiency indicators are currently being developed by MfE and MBIE and will be incorporated into future quarterly and annual reporting when available.

The quarterly monitoring report is a new tool for SmartGrowth to use to improve its understanding of housing and business markets. SmartGrowth is committed to improving these monitoring documents over time.

# Appendix 1

## Explanation of MBIE/ MfE Indicators for the National Policy Statement on Urban Development Capacity<sup>4</sup>.

### Dwelling sales prices (actual) – (SGDT Ref: Section 4.1)

#### Technical notes

Prices are presented in nominal terms; that is, they have not been adjusted for general inflation. Median prices are heavily influenced by the sale of existing stock, as new builds comprise a small proportion of total sales in any given period. They are also affected by the composition of sales, including the size and quality of dwellings, as well as type (houses, apartments etc.), which may vary by area and over time. This median price series is not adjusted for size and quality of dwellings.

Data source: CoreLogic, MBIE

#### Interpretation

This indicator shows the median prices of residential dwellings sold in each quarter. It provides a broad and recognisable picture of absolute price levels and is therefore a useful starting point for analysing price trends. Significant dwelling price growth can increase the feasibility of new developments (eg suburban apartments). On the other hand, rapid price increases can fuel land banking, where landowners expect continued future increases.

In general, if dwelling prices are rising, we would expect to see dwelling building consent numbers rise in response. If prices are rising without evidence of growth in consents, it may indicate a constraint on supply and should motivate further investigation.

Variations in prices between different areas may reflect a range of factors, including differences in demand for housing due to different wage levels or different levels of consumer and natural amenities; or imbalances between demand and supply due to constraints on housing development. Where price differences persist over long periods of time and coincide with similar rates of housing supply, they are more likely to reflect differences in demand.

Price trends reflect many different forces acting in the market, including but not limited to the effect of urban planning policies. Developing a narrative about which factors are driving price trends is challenging but can provide useful insights for a local authority's planning response to these trends.

### Nominal dwelling rents – (SGDT Ref: Section 4.2)

#### Technical notes

This indicator reflects nominal mean rents as reported in bonds lodged with MBIE, in dollars.

The data is for private bonds (private landlords) and hence excludes social housing.

The mean used is the geometric mean. The reason for using this mean is that rents cluster around round numbers, and tend to plateau for months at a time (spiking up by say \$10 or \$20 at a time). This makes analysis of time series difficult and using the geometric mean is a way of removing this clustering effect.

There are a number of caveats on these data series:

- Property type is self-reported so can be inconsistent, particularly the distinction between apartment and flat as there is no clear separation between these categories.
- It captures bonds at the time of lodging (typically at the start of a tenancy), so doesn't reflect subsequent changes in these rents. It will therefore tend to understate the rent over the term of a tenancy.

Data source: CoreLogic, MBIE

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<sup>4</sup> National Policy Statement on Urban Development Capacity: Guide on Evidence and Monitoring, Ministry of Business, Innovation and Employment and the Ministry for the Environment, June 2017

## Interpretation

Like the median dwelling sale price indicator shown in Figure 13, this measure provides a broad and recognisable picture of absolute rent levels, and should therefore be the starting point for analysing trends in rents. In general, strong and persistent growth in rents indicates, even more strongly than house price increases, that housing supply is insufficient to meet demand.

This is because rents tend to be more sensitive to income levels than dwelling prices, and on average, renters also have lower incomes than home owners. For this reason, rent increases tend to follow incomes more closely than house prices and are less volatile.

Estimates of mean rents at a local level may be affected by the composition of rental stock (ie the size and type of rental dwellings). This does not vary markedly between territorial authority areas. However, there may be significant differences between suburbs that may make a 'like for like' comparison difficult. For instance, the Auckland city centre has a high proportion of one bedroom apartments while other suburbs are dominated by three-bedroom stand-alone houses. More disaggregated data on rent trends for different types of rental accommodation is available on the MBIE website.

The rental stock is typically of lower quality and less well maintained than owner-occupied dwellings. This means that comparing average prices with average rents may be misleading as the characteristics of the average rental property are likely to be different than the characteristics of the average dwelling sale.

The chart above presents geometric median rents for five high-growth urban areas. It shows that:

- The cost of renting is highest in Auckland and lowest in Hamilton, which is consistent with differences in median sale prices between cities
- Rents in Christchurch rose rapidly after the 2011 Canterbury Earthquake, due to the shortage of housing resulting from earthquake damage, but they have fallen since the start of 2016.

To assist in interpreting data on rents, information on the share of households living in rented accommodation versus owner-occupied housing, and the characteristics of those households, is available on Statistics New Zealand's website<sup>45</sup>.

## Ratio of dwelling sales prices to rents – (SGDT Ref: Section 4.4)

### Technical notes

This indicator shows the ratio of nominal median dwelling prices to nominal (geometric) mean rents. The geometric mean is used to help smooth the data by removing the "clustering effect" (where rents cluster at round number amounts).

House prices relate to the whole housing stock in the selected area, not just the rented stock. As owner-occupied housing tends to be of better quality and of higher value than rented stock–this ratio tends to over-state house prices (relative to the median price for rented housing only).

This relationship between rents and house prices is often expressed as a rental yield to investors using the same data, which is calculated by mean rents divided by the median house price.

Data source: CoreLogic, MBIE

### Interpretation

This indicator reflects the relationship between median house prices and mean rents in the same geographical area.

The higher the house price/rent ratio:

- *The greater the gap between renting and buying.* A ratio of 30 indicates that the price of a median house is 30 times the mean annual rent paid. High ratios will tend to reduce home ownership rates due to it being more attractive or affordable for many to rent than to buy a dwelling.

- *The lower the average yield to an investor from renting out a dwelling.* Investors vary in their motivations for purchasing rental properties, and in the types of properties they are interested in owning. Income-focused investors will seek to maximise rental yields while others may be more motivated by the expectation of capital gains over the longer term. When increases in rents don't keep pace with house prices, investors increasingly rely on capital growth as a source of returns rather than rental yield.

Further analysis of trends in home buyers may assist the interpretation of this measure. CoreLogic has a "buyer classification" that disaggregates sales according to whether the purchasers are first home buyers, existing owner 'movers', or investors. This data also records where investors are based or movers are from, so is a useful indicator of the impacts of one local area on another.'

## **Housing affordability indicators** – (SGDT Ref: Section 4.6)

### **Technical notes**

HAM Buy and Rent measures have been released as an 'experimental' series that will eventually be turned into official statistics on housing affordability.

These measures use data on household incomes and rents from Statistics New Zealand's Integrated Data Infrastructure, Corelogic sales price information, and mortgage interest rates.

For potential home-owning households, HAM Buy calculates what their residual income would be after housing costs if they were to buy a modest (ie lower quartile) first home in the area in which they currently live. For renting households, HAM Rent calculates what their residual income would be after paying the rent.

Households are then classified as being either above or below a 2013 National Affordability Benchmark. This is set as the median affordability for all homeowners and renters, nation-wide, in June 2013.

HAM measures are available for territorial authorities, and also for Auckland wards. At the time this guidance was released, they were only available through the first quarter of 2016, ie with a one-year lag. This indicator will be updated to be more timely in future releases. For further information, refer to MBIE's website.

Data Source: MBIE

### **Interpretation**

The HAM indicators provide a picture of national and regional housing affordability trends, bringing together the impact of changes in house prices or rents, mortgage interest rates and incomes.

The indicators calculate how much money households have left over after paying for their housing costs. For renting households, HAM Rent reflects how much money is left over after paying rent for an appropriately sized dwelling in the area in which they currently live. For the population of potential first home buyers, HAM Buy reflects how much money they would have left over if they were to transition from renting to home ownership by purchasing a modest home in the area in which they currently live.

These residuals are then compared with a 2013 National Affordability Benchmark, which is the national average for all renting and home-owning households. Because renting households typically have lower incomes relative to housing costs than home owners, more than half of them fall below the 2013 National Affordability Benchmark.

A higher number on the charts indicates a lower level of affordability, as it indicates that more households fall below the affordability benchmarks, and vice versa.

It is most appropriate to use HAM Buy and HAM Rent to understand trends in housing affordability in a particular area. If the share of households that do not meet the affordability benchmark is rising, it indicates that housing is becoming less affordable in an area. Comparisons between cities may be less meaningful.

Differences in the level of HAM indicators between cities could reflect a combination of factors. For instance, Auckland and Wellington have lower HAM Rent indicators than other cities (indicating better



rental affordability) in spite of the fact that rents in these cities are generally higher. This reflects the fact that renting households in these cities also have higher incomes.

Given evidence that dwelling sale prices in several cities have risen significantly from 2016, it seems likely that home buyer affordability will have deteriorated. This should be picked up as the indicator is updated.

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## Appendix 2

### Explanation of Development Terms

**"Urban"** refers to subdivisions or dwelling consents in:

*Western Bay of Plenty District* - Residential, Future Urban, Commercial, Industrial, or Multi zones.

*Tauranga City* – Suburban Residential, High Density Residential, City Living, Wairakei Residential, Papamoa East Employment, Town Centre Core (Wairakei), Town Centre Fringe (Wairakei) Marae Community (Urban), Rural-residential, Commercial and Industry zones.

**"Rural"** refers to subdivisions or dwelling consents in:

*Western Bay of Plenty District* - Rural, Rural-residential or Lifestyle zones.

*Tauranga City* – Rural, Rural Marae Community), and Te Tumu Future Urban zones.

**Other terms used:**

*Western Bay of Plenty District* – "Other urban areas" refers to minor urban areas such as Maketu, Pukehina, Paengaroa, Tanners Point, Kauri Point etc.

*Tauranga City* – "Coastal Strip" refers to Mt Maunganui-Papamoa, specifically the area units of Mt Maunganui North, Omanu, Matapihi, Arataki, Te Maunga, Pacific View, Palm Beach, Gravatt, Papamoa Beach East, Palm Springs, and Doncaster. "Tauranga" refers to all other area units in Tauranga City.

*Greenfield UGA* – Greenfield Urban Growth Area.

*SP* – Structure Plan.

### Subdivision Process

Subdivisions go through a staged approval process that can last up to eight years.

**Stage 1 Subdivision Plan**

Subdivision is approved by the Council under section 104 of the Resource Management Act 1991 (RMA). This approval has a legal life of up to 5 years.

**Stage 2 Survey Plan**

This is approved under section 223 RMA. This approval has a legal life of up to 3 years.

**Stage 3 Final Approval**

Occurs under section 224 RMA. This is confirmation that all conditions of the subdivision consent have been complied with. After the Council issues a Section 224 Certificate individual property titles can be issued, once the subdivision proceeds to title issue under the Land Transfer Act. It is assumed for monitoring purposes that all Section 224 Certificates proceed to title issue.

A distinction is made between subdivisions approved and additional lots created at the Section 224 Certificate stage. The number of subdivisions approved does not necessarily indicate the likely future number of new lots created in the District, and hence the demand for services.

A more accurate indicator of growth is additional lots created at Section 224 approval stage. For monitoring purposes, this figure is used to interpret land uptake rates (along with dwelling consent data) and vacant land supply. In the Western Bay of Plenty District the ratio of urban land uptake in Greenfield UGA's to rural subdivision is expected to increase as infrastructure is improved at Waihi Beach, Katikati, Omokoroa and Te Puke.

In Tauranga City, the uptake of urban land in Greenfield UGA's is calculated from Section 224/new title information to indicate the proportion of planned capacity that has been "urbanised". The predictive value of this measure is reduced in the infill area primarily in areas where unit title developments are more common (such as Mount Maunganui and Tauranga Central) as these are issued at the time of, or after, the building consent has been approved.

Before a subdivision reaches final approval stage, variations to the original application can be submitted to the Council. Either a variation or the original application may go through to final approval stage. For this reason variations are not included in the total subdivisions approved, so as not to count them twice.

Subdivisions are only indicative of development where additional lots to the original title or titles are created. For this reason all subdivisions reported on do not include resource consent approvals for boundary adjustments or access ways etc. that do not result in additional lots being created.

## **Building Consent Issue for Dwellings**

### **Western Bay of Plenty District**

In the Western Bay of Plenty District, building consents issued for new dwellings provide a good indicator of growth rates in different areas. It should be noted that where dwelling consents are referred to in this report, the figures include consents for new and resited dwellings, but not for additions or alterations to existing dwellings.

### **Tauranga City**

Building consents issued for new dwellings make up about 45% of all building consents issued. New dwellings are recorded in a similar manner to the Western Bay of Plenty District, including new dwellings, relocated dwellings and conversions of existing buildings to dwellings; it does not include additions or alterations to existing dwellings. Where dwellings are demolished or removed from a site, or changed in use to a non-residential activity, they are deducted from the "new dwelling" count to produce an "additional dwelling" count for comparison with the SmartGrowth dwelling projections in Section 3.3 of this report.

## Residential Growth Areas

### Western Bay of Plenty District

These areas are the settlements of Waihi Beach (including Island View, Pios Beach, and Athenree), Katikati, Omokoroa and Te Puke. These areas have been identified as the urban growth centres for the District in the Western Bay of Plenty District Council.

All residential growth areas in the District; Te Puke, Katikati, Waihi Beach and Omokoroa, are now serviced by comprehensive sewerage schemes while the communities of Maketu/Little Waihi and Pukehina are currently served by septic tanks. Plans for a wastewater collection, treatment and disposal system or transfer pipeline for these areas are currently progressing.

The Western Bay of Plenty District Plan contains different subdivision standards in recognition of the ability of areas to accommodate future growth. This is dependent upon infrastructure availability, particularly wastewater disposal.

- For unsewered urban areas, a minimum net lot size of 1600m<sup>2</sup> is required to subdivide, as the minimum net lot size is 800m<sup>2</sup>. To allow for access ways, 1800m<sup>2</sup> is used for monitoring purposes for subdivision potential.
- For sewered urban areas, a minimum net lot size of 700m<sup>2</sup> is required to subdivide, as the minimum net lot size is 350m<sup>2</sup>. To allow for access ways, 800m<sup>2</sup> is used for monitoring purposes for subdivision potential except in Omokoroa where a minimum lot size of 400m<sup>2</sup> is permitted in Stage 1 and a minimum of 600m<sup>2</sup> is allowed in the existing village.

For monitoring purposes, the future growth potential of areas is limited largely by the sewerage systems available.

### Tauranga City

The Greenfield UGA's are the developing suburbs of Bethlehem, Pyes Pa, Pyes Pa West (the Lakes), Ohauti, Welcome Bay, Wairakei (Papamoa East) and Papamoa. The Greenfield UGA's are part of a comprehensive infrastructure planning approach to "greenfield" urban development. Areas outside the identified Greenfield UGA's do not have services supplied to them. In this way the Council manages the uptake of land for development.

The other significant areas of urban development is infill development in established residential areas, and residential intensification (currently limited to the Mount Maunganui High Density Residential zoned area northwest of Banks and Salisbury avenues, and the City Living zoned areas surrounding the Tauranga CBD) within established residential areas of Tauranga.

### Vacant Land

Vacant residential land is generally identified in the sub-region as either **infill** or **greenfield**. Monitoring infill subdivisions tells us the rate of land uptake within established residential areas. Infill subdivisions

are expected to continue to accommodate a substantial proportion of projected growth, especially close to main commercial areas.

In Western Bay of Plenty District, a subdivision yield of 11 sections per hectare is used for determining the development potential of residential greenfield areas. This figure is reflective of current development patterns. In Tauranga City, the yield varies from 9 to 15 sections per hectare in response to physical constraints (e.g. topography) and to the strategic intent for each Greenfield UGA structure plan.

## Western Bay of Plenty District

Vacant residential land is identified in the Western Bay of Plenty District as either *infill* or *greenfield* determined by the size of the land parcel. This is reported on for the residential growth areas in the District.

*Residential infill* existing urban areas of Western Bay District where a land parcel is 800m<sup>2</sup> or with the potential to enable subdivision to a minimum lot size of 350m<sup>2</sup>. Except in Omokoroa where a minimum lot size of 400m<sup>2</sup> is permitted in Stage 1 and a minimum of 600m<sup>2</sup> is allowed in the existing village.

*Residential greenfield* any land parcel which is subdivided within Greenfield UGAs (constituting “traditional” rezoning of rural land to residential, and subdivision and development for residential purposes).

In the Western Bay of Plenty District a practical figure of potential infill development is calculated by taking the number of developed lots over 800m<sup>2</sup> (sewered) and 1800m<sup>2</sup> (unsewered) in a residential zone and multiplying this figure by 56%<sup>1</sup>.

## Tauranga City

Vacant residential land is classified in Tauranga City as either Infill, Rural Infill or Greenfield UGA. Within the infill areas some residential intensification is expected within identified Residential Intensification Areas and within general residential infill/ intensification areas where appropriate.

*Residential Intensification Areas* currently this classification is applied to development within the High Density Residential zoned area in Mount Maunganui North, and City Living and City Centre zoned areas where greater density is permitted.

*Residential infill/ Intensification* existing urban areas of Tauranga zoned Suburban Residential where a land parcel is 650 m<sup>2</sup> or with the potential to enable subdivision to a minimum lot size of 325 m<sup>2</sup>. Includes residential

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<sup>1</sup> Theoretical calculations assume that every developed lot has only one dwelling, and that it is positioned in such a way that there is enough spare land to locate an additional dwelling. This of course is incorrect and a theoretical figure is produced when all of these properties are calculated. To obtain a more realistic figure of properties that could be further developed, the theoretical figure is multiplied by 56% to give a practical figure. This percentage was obtained through a desktop analysis of aerial photographs of Waihi Beach in late 1998. A sample area was examined to obtain a realistic number of developed properties that had potential for further development, without shifting the existing dwelling, and a comparison made back to the theoretical figure calculated for that exercise.

growth in other zones within the infill area such as in Commercial Business zoned areas.

*Rural Infill*

Areas of Tauranga City with Rural zoning outside the Greenfield UGA's

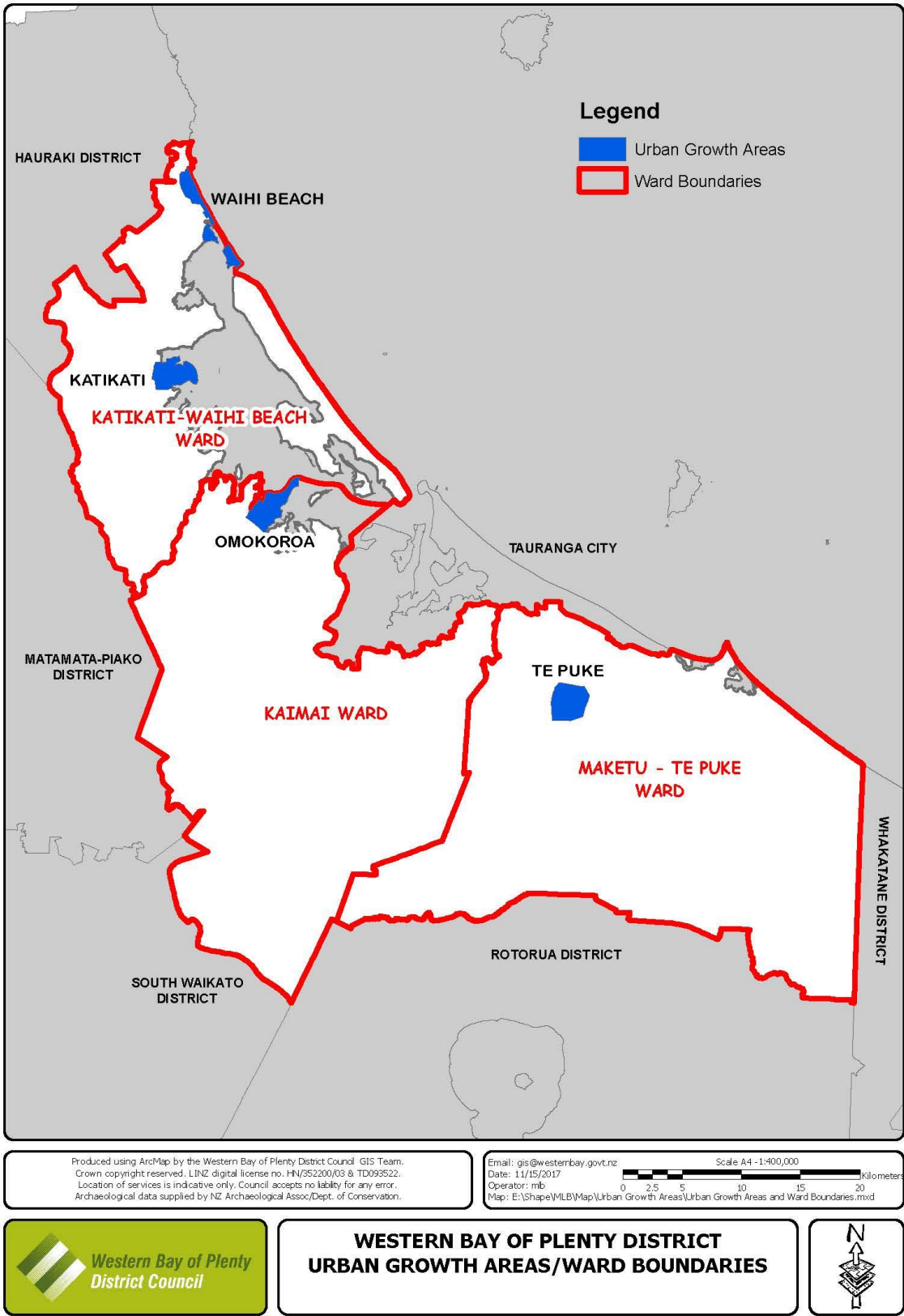
*Residential Greenfield UGA's*

any land parcel which is subdivided within Greenfield UGA's (constituting "traditional" rezoning of rural land to residential, and subdivision and development for residential purposes).

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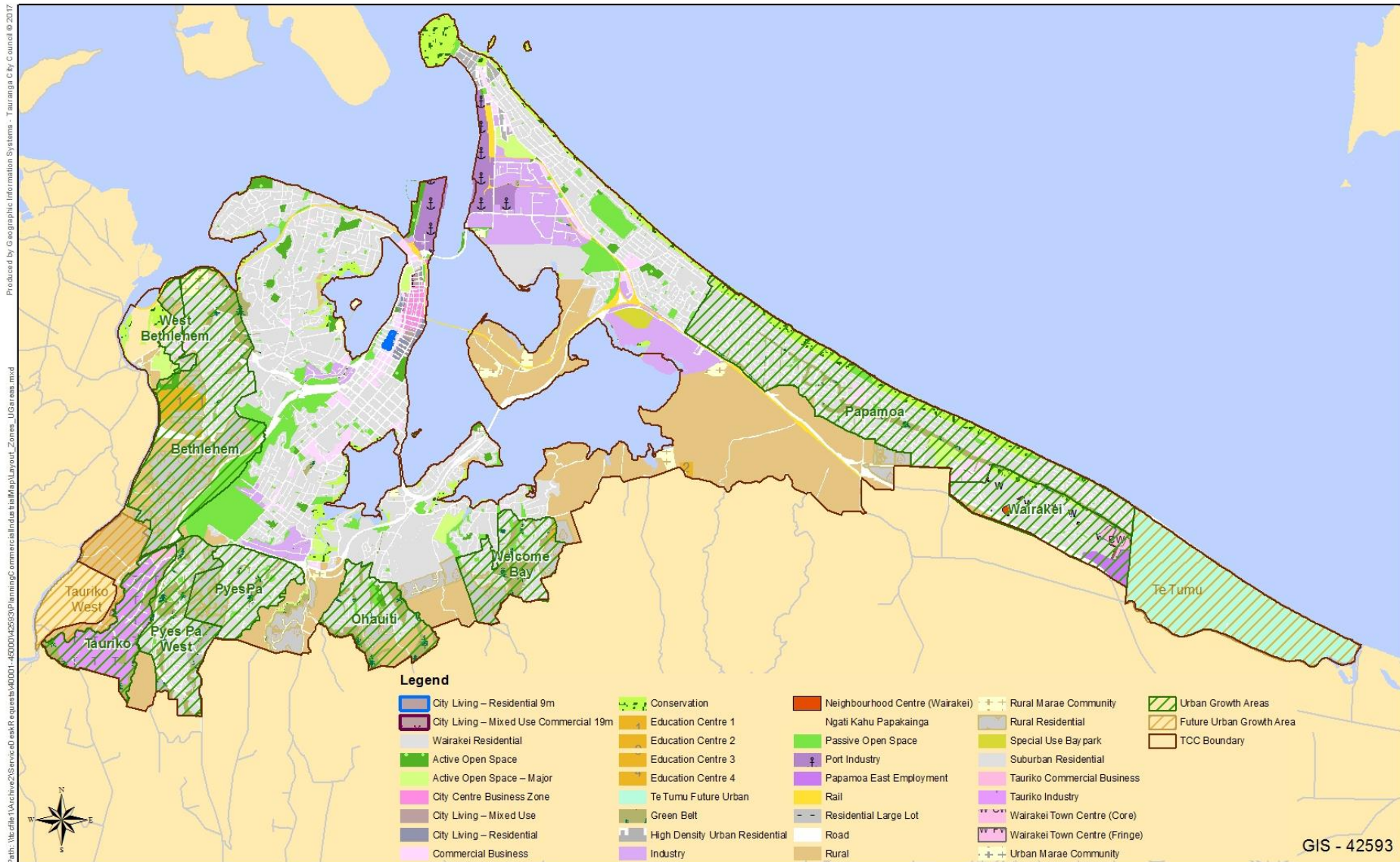
# Appendix 3

## Western Bay of Plenty District Development Map



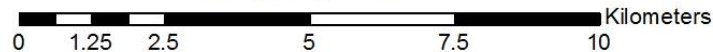


# Tauranga City Development Map



## PLANNING ZONES AND URBAN GROWTH AREAS

- Tauranga City Council -



Information shown on this plan is indicative only. The Council accepts no liability for its accuracy and it is your responsibility to ensure that the data contained herein is appropriate and applicable to the end use intended.

## Appendix 4

### Dwelling Occupancy By Census Area Unit – Western Bay of Plenty District and Tauranga City.

#### Western Bay of Plenty District (2013 Census)

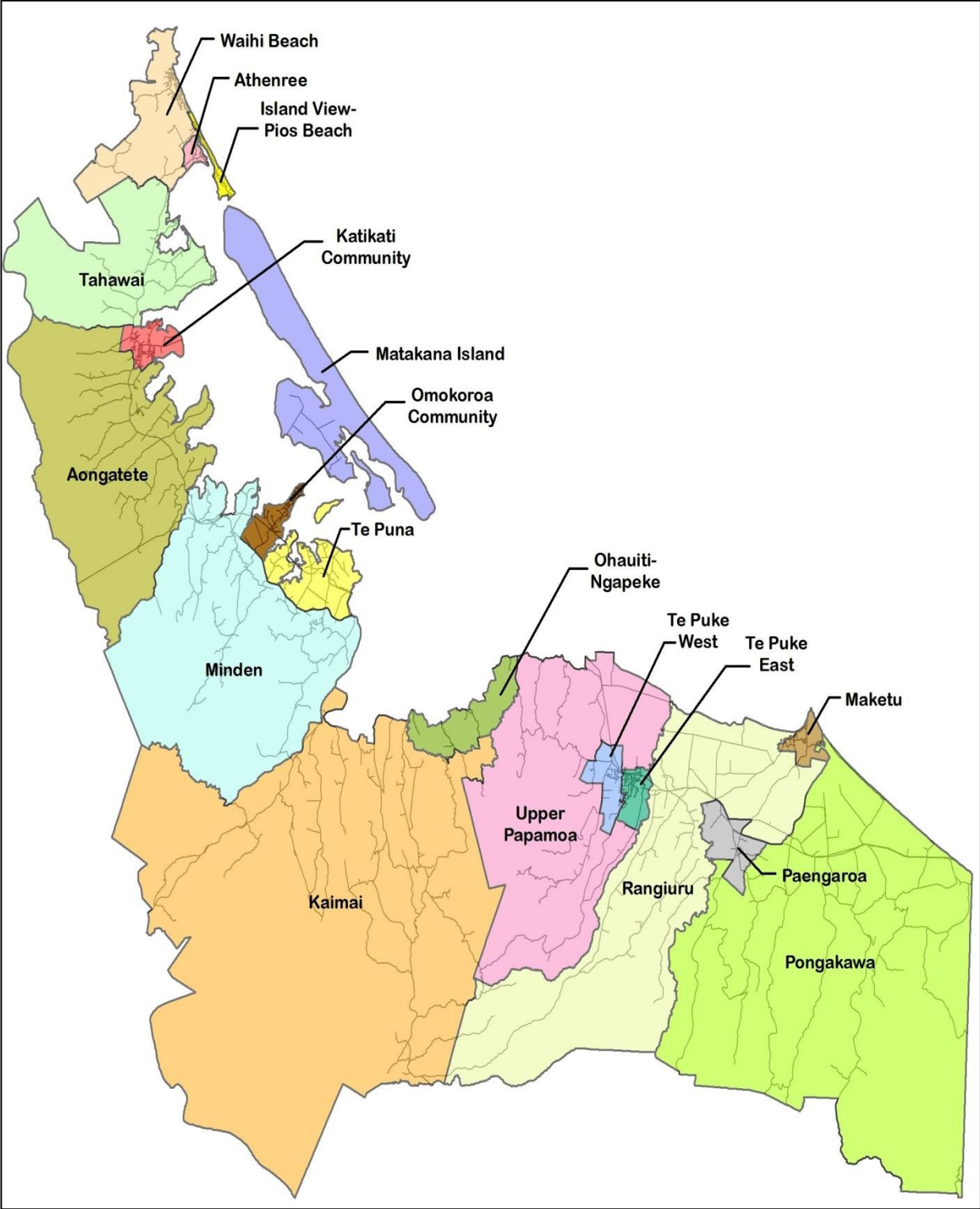
Census Area Unit	Population	2013 Occupied Dwelling Count	2013 Unoccupied Dwelling Count	2013 Total Dwelling Count	Unoccupied/ Total Ratio (%)
Waihi Beach	1,935	888	858	1,746	49
Athenree	672	267	105	372	28
Island View-Pios Beach	543	249	387	636	61
Matakana Island	255	87	45	132	34
Katikati	4,059	1,686	174	1,860	9
Tahawai	1,707	708	87	795	11
Aongatete	2,832	1,113	117	1,230	10
Omokoroa	2,547	1,071	147	1,218	12
Te Puna	2,439	918	54	972	6
Minden	4,401	1,662	111	1,773	6
Kaimai	5,286	1,956	123	2,079	6
Ohauiti-Ngapeke	711	279	18	297	6
Upper Papamoa	2,166	813	57	870	7
Maketu	1,047	405	144	549	26
Paengaroa	906	339	21	360	6
Rangioru	2,097	747	78	825	9
Pongakawa	2,595	1,002	441	1,443	31
Te Puke	7,494	2,748	189	2,937	6
<b>TOTAL</b>	<b>43,692</b>	<b>16,938</b>	<b>3,156</b>	<b>20,094</b>	<b>16</b>

## Tauranga City (2013 Census)

Census Area Unit	2013 Occupied Dwellings	2013 Unoccupied Dwellings	2013 Total Dwellings	Unoccupied/ Total Ratio (%)
Papamoa Beach East	1,269	147	1,416	10
Palm Springs	1,563	294	1,857	16
Doncaster	927	66	993	7
Matapihi	222	12	234	5
Inlet-Tauranga Harbour	9	-	0	0
Waikareao Estuary	-	-	0	0
Motuopae Island	-	-	0	0
Kairua	147	6	153	4
Bethlehem East	1,332	60	1,392	4
Bethlehem	1,353	102	1,455	7
Pacific View	1,125	117	1,242	9
Palm Beach	1,410	180	1,590	11
Gravatt	1,224	87	1,311	7
Mt Maunganui North	1,992	921	2,913	32
Omanu	2,133	357	2,490	14
Tauranga City-Marinas	51	3	54	6
Arataki	2,085	216	2,301	9
Te Maunga	2,199	234	2,433	10
Matua	2,067	111	2,178	5
Bellevue	1,248	51	1,299	4
Otumoetai North	1,767	147	1,914	8
Otumoetai South	1,413	78	1,491	5
Brookfield	1,920	108	2,028	5
Te Reti	594	39	633	6
Judea	975	78	1,053	7
Gate Pa	1,128	63	1,191	5
Greerton	1,830	105	1,935	5
Pyes Pa	2,145	141	2,286	6
Yatton Park	840	75	915	8
Poike	267	6	273	2
Hairini	2,280	123	2,403	5
Maungatapu	1,092	75	1,167	6
Tauranga Hospital	777	51	828	6
Tauranga South	1,926	135	2,061	7
Tauranga Central	1,041	123	1,164	11
Sulphur Point	15	3	18	17
Kaitemako	495	27	522	5
Welcome Bay West	1,221	51	1,272	4
Welcome Bay East	1,278	87	1,365	6
<b>Total</b>	<b>45,366</b>	<b>4473</b>	<b>49,839</b>	<b>9</b>

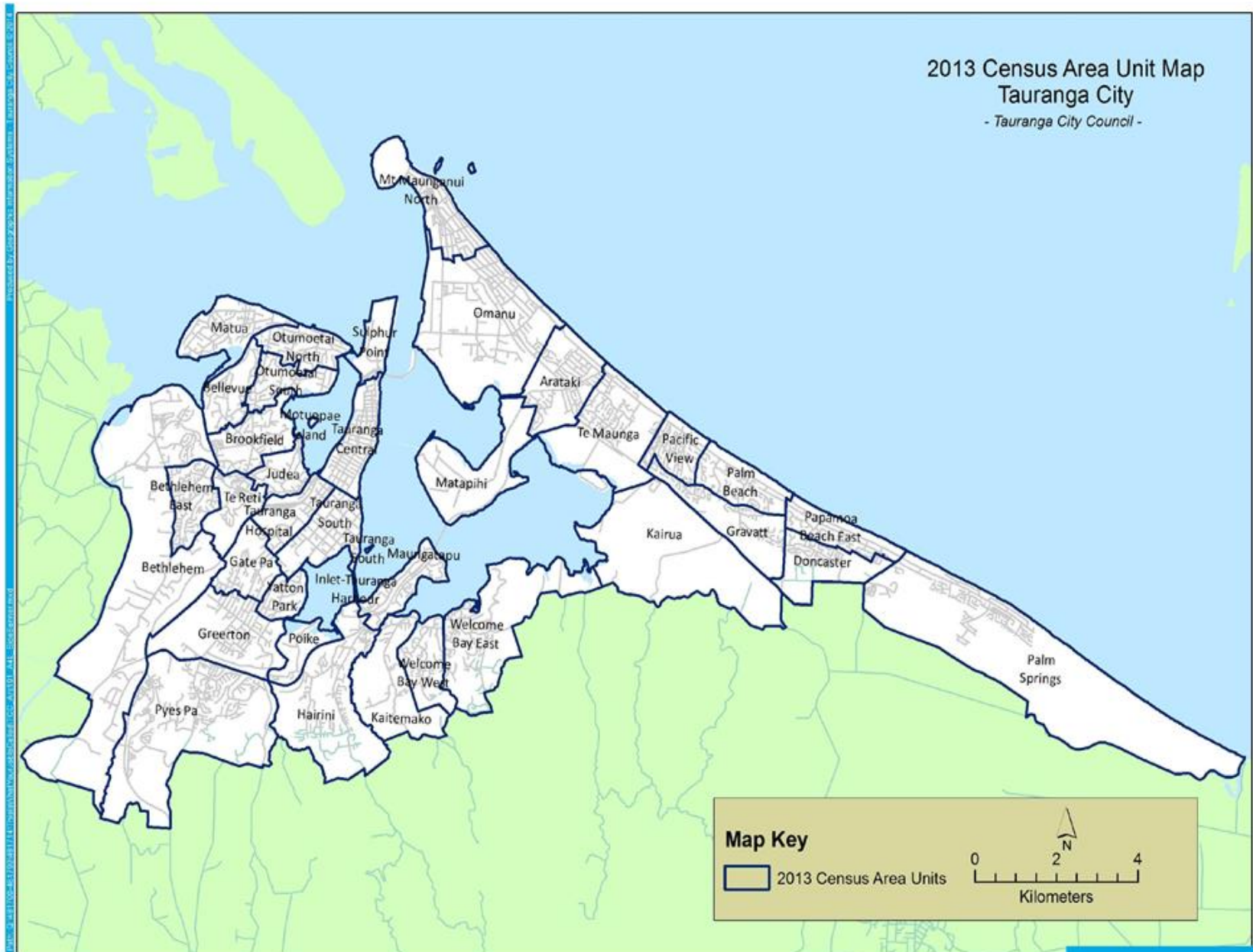
# Appendix 5

Western Bay of Plenty District Census Area Unit Map



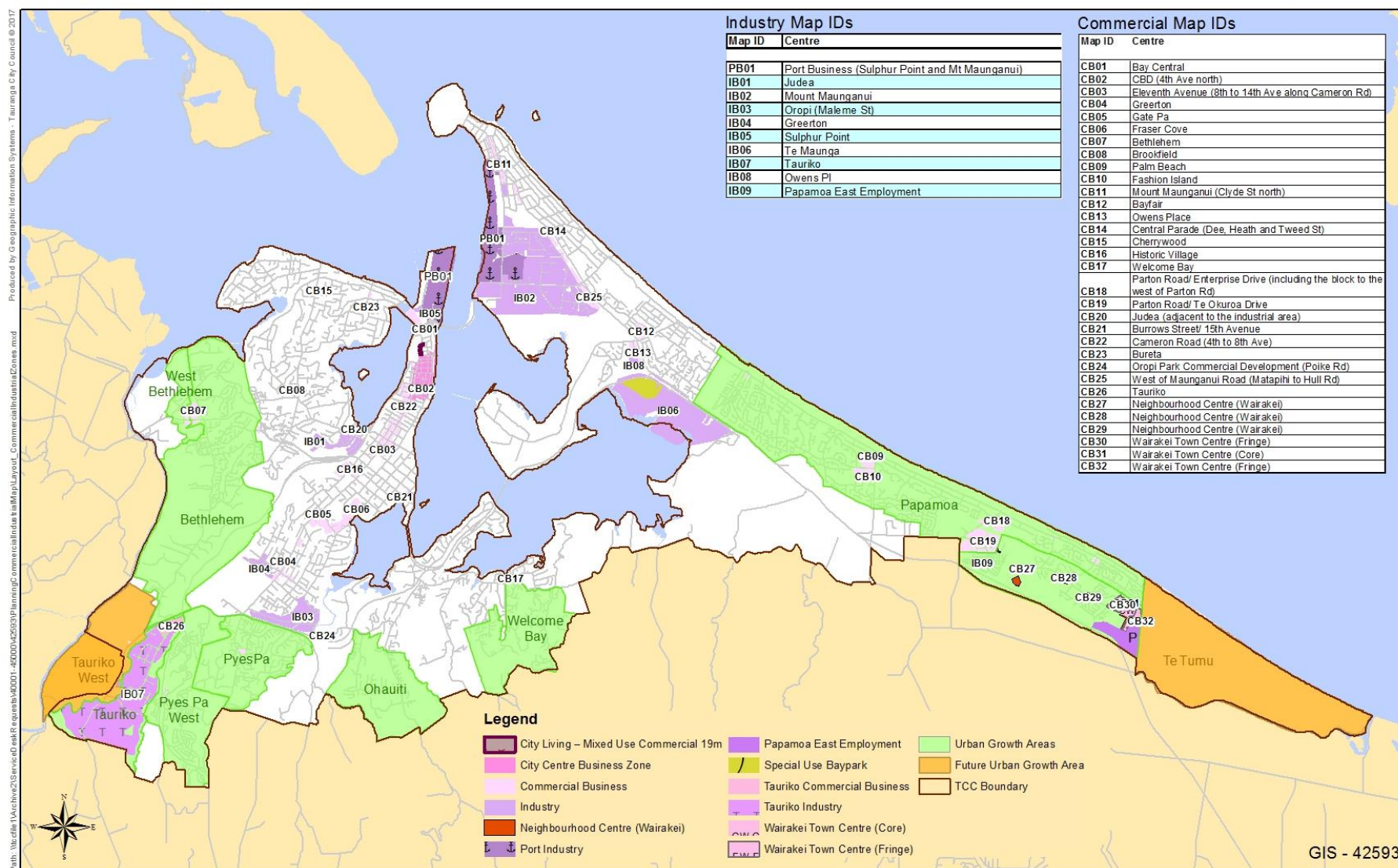


# Tauranga City Census Area Unit Map (2013 Census)



# Appendix 6

## Tauranga City Commercial and Industry Zoned Areas

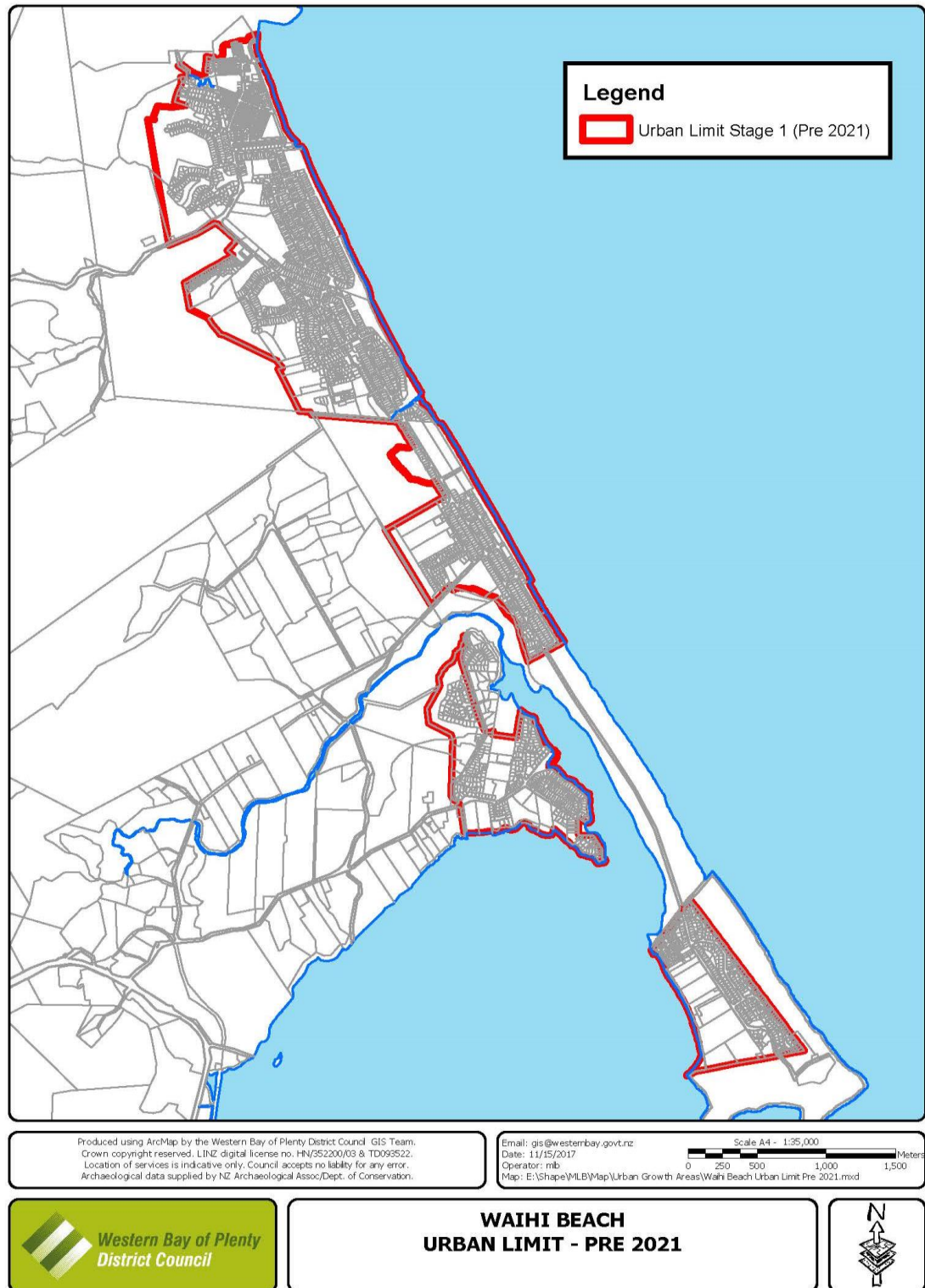




## Appendix 7

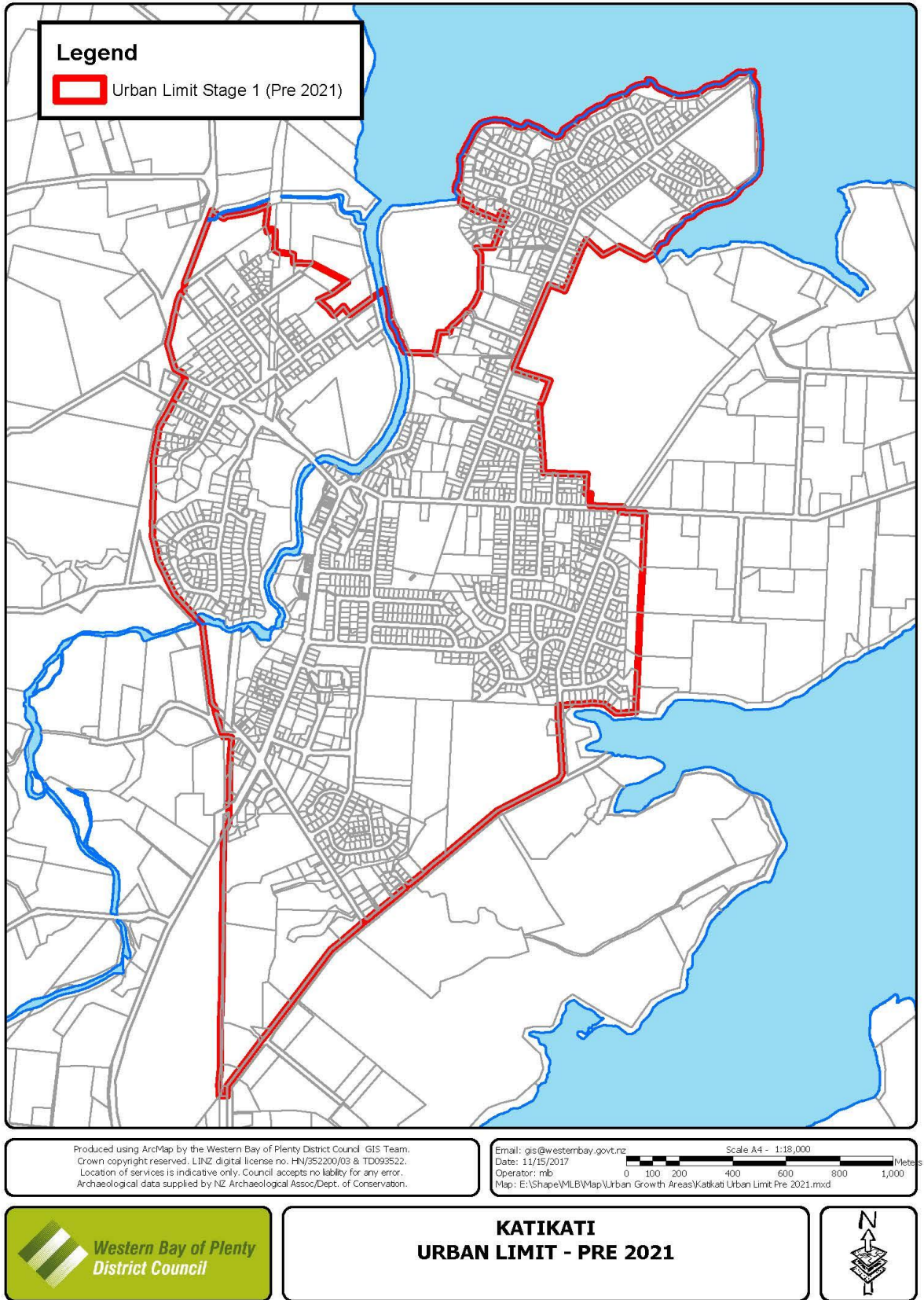
### Western Bay of Plenty District Stage 1 Areas For Urban Growth Area Sequencing

#### Waihi Beach

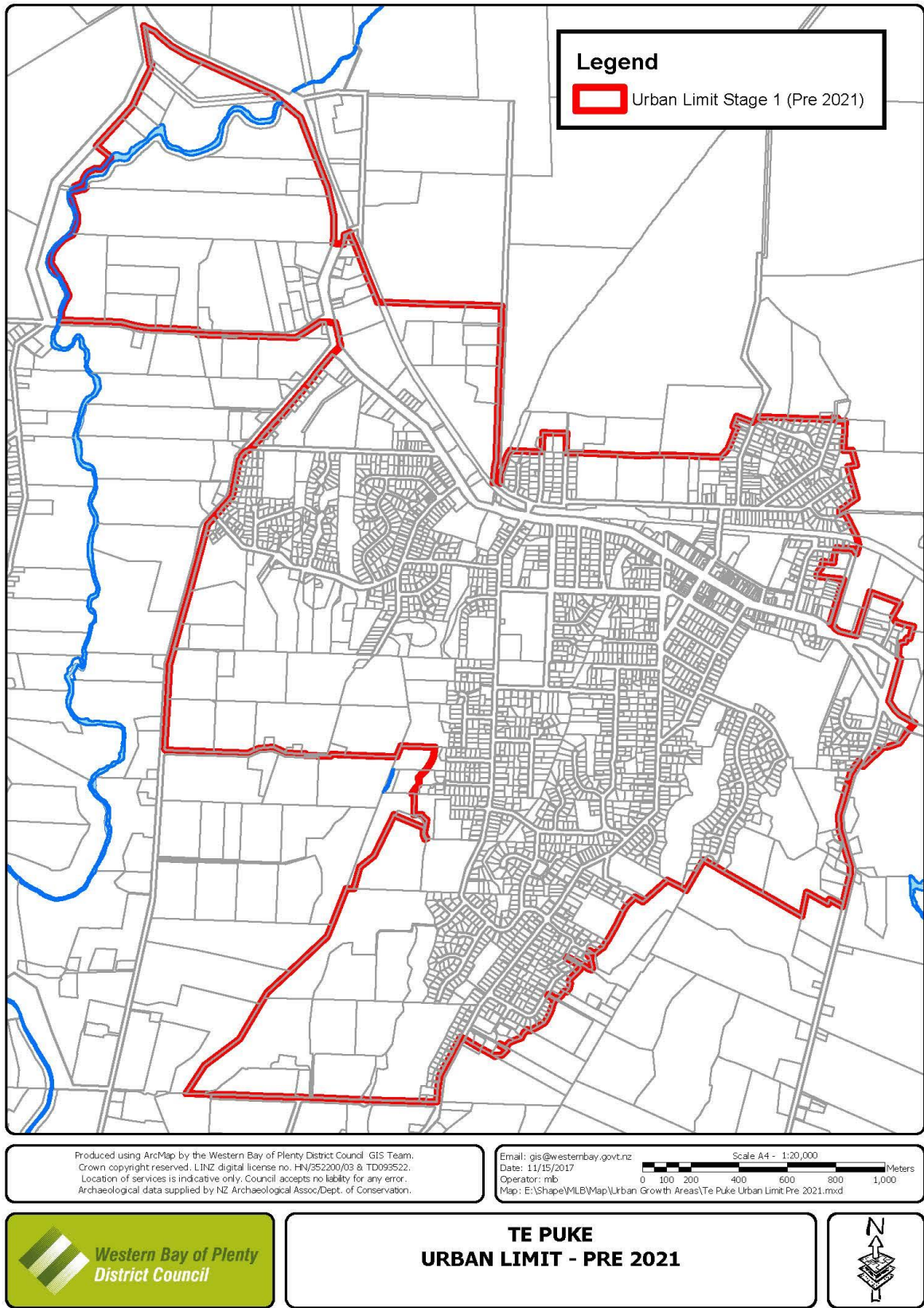




**Katikati**



**Te Puke**





**Omokoroa**

