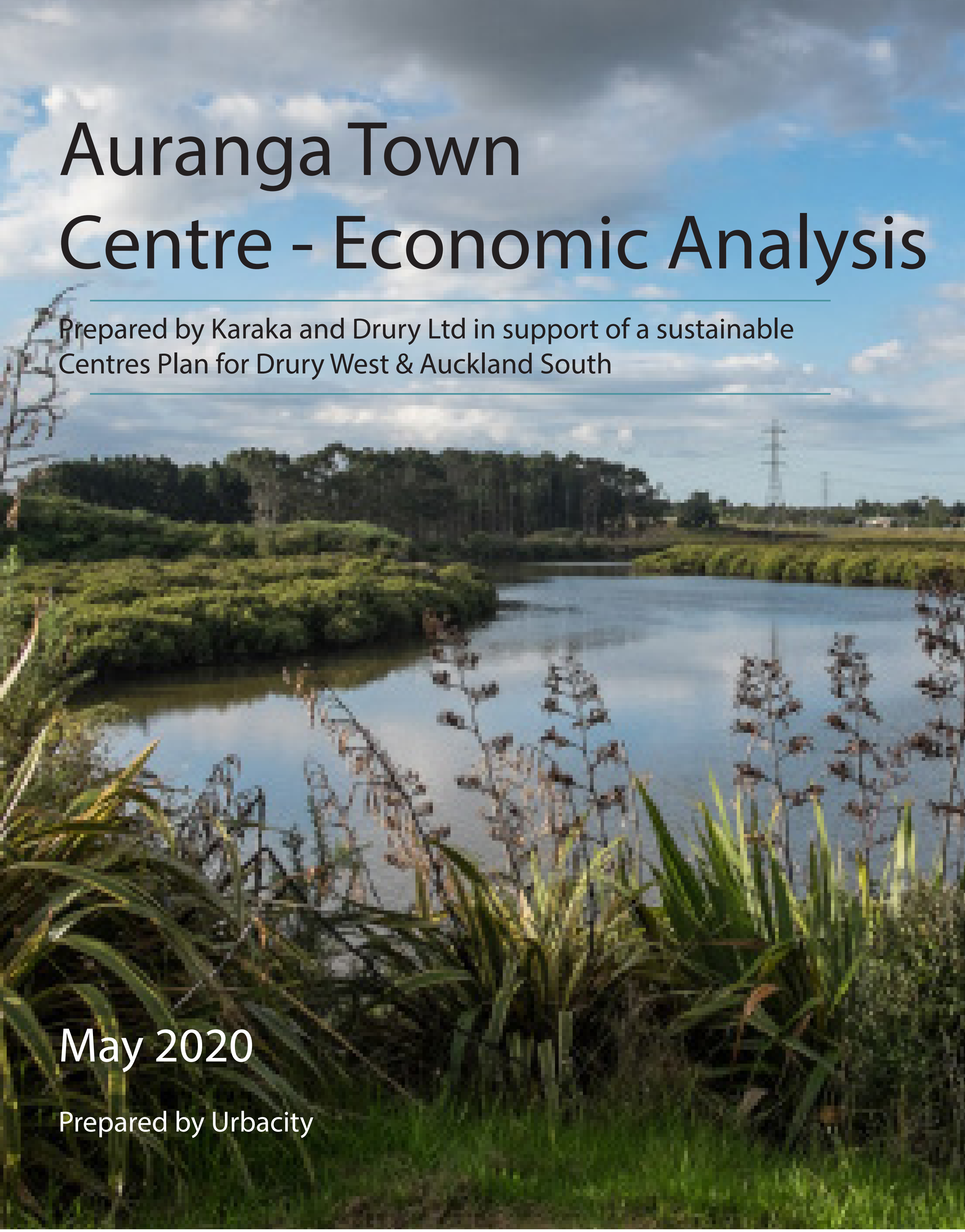

Auranga Town Centre - Economic Analysis

Prepared by Karaka and Drury Ltd in support of a sustainable Centres Plan for Drury West & Auckland South

May 2020

Prepared by Urbacity

AURANGA

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Executive Summary

This report is in support of a Plan Change (Auranga B2 Private Plan Change).
The report focuses on the role of the Proposed Auranga Town Centre as a provider of retail goods and services for the growing Drury West catchment, and ultimately as an inspiration for a broader employment strategy in Drury West that will deliver a more sustainable Auckland south.

The proposed centre is urban, as it will be built around streets - not as a mall. The basis of the urban strategy is to allow for the wider range and diversity of jobs and dwelling densities that naturally accrue to urban centres. The ability to provide these wider economic benefits has been independently tested by Space Syntax (London).

Context
The comprehensively planned Auranga Town Centre seeks to improve economic performance within Auckland's south and to grow levels of self-containment, thereby reducing pressure on the Motorways.

The suitability of the location of the centre has been verified in extensive community consultation and by Space Syntax. The centre is in the most effective place.

There are two centre opportunities for the Drury West and Drury Opaheke (Drury East) area.

- A centre serving the east side catchment.
- A centre serving the west side catchment.

The operating geography of the Drury area results in split catchments created by the State Highway (motorway) barrier and the Drury Interchange.

The proposed Drury West (Auranga) centre sits between Burberry Road and Jesmond Road and in a timed sequence, eventually extends across State Highway 22 and the rail line to encompass proposed business zoned land to the south. This land is poorly suited to residential, being compromised by floodways. The KDL work over the past 4 years has highlighted the need for jobs in the south. The urban town centre's retail component is an early facilitator of jobs.

At present, however, KDL seeks a zone for its land off Burberry Road and State Highway 22, to develop a supermarket, specialty shops and other personal and professional services facilities. The centre will begin its early life as a convenience centre for the growing Drury West catchment but is ultimately to become an integrated, mixed-use town centre with an extensive range of high-value jobs.

Centre Catchment Drury West
Drury West FUZ is estimated to yield around 12,000 dwellings, but there are an additional 700 dwellings outside the FUZ that would find the Auranga Town Centre convenient. Currently being developed in Auranga A & B, there are around 2,650 dwelling sites. In and around Drury, there were an estimated 2,115 households in

2018. With continuing growth, this is a threshold to start this centre with a single supermarket and associated shops and activities.

Centre Status & Catchments
The motorway forms an effective barrier to movement between the east and the west in Drury and assists to define the catchments for centres. Beyond 2028, residential development will occur in Drury East. As this growth continues, it is expected that a centre will develop in Drury East.

Papakura to the north of the area and on the east side of the motorway is a Metropolitan Centre. Its catchment reach will extend to Drury and beyond. The Proposed Auranga Town Centre would be subservient to Papakura.

Drury Rail Station & Employment
The urban nature of the Auranga Town Centre and structure design of the Auranga masterplan offers an extension of the employment lands across the rail line to the south, focused on the rail station. KDL sees this area as an urban extension of the Auranga Town Centre. The network allows for simplification of access from the Town Centre (the zone subject to this Plan Change request) across the rail line using existing crossing points. Space Syntax modelling highlights the value and performance of these links in creating employment.

Effects
The Plan Change request provides for the daily and weekly needs of an existing and growing catchment. In the short term, it will also reduce travel for these services from residents in Drury East and West.

Existing centres in the area are at Pukekohe (approx. 13 kms south of the proposed site), Papakura (approx 7kms north of the proposed site) and Drury local centre (approx 2 kms from the proposed site). Papakura will benefit from growth in Drury West, which will favour resources provided in Papakura at the Metropolitan level. The proposed Auranga Town Centre is at a different level in the hierarchy and is seeking to service growth, not existing catchments of existing centres. There are unlikely to be any negative effects on Pukekohe, but over time the Drury local centre may need to modify its offer.

The Auckland Unitary Plan (AUP) Chapter B2 Urban Growth and form promotes a compact urban form, that enables higher productivity and economic growth. Proposed plans (such as this Proposed Plan Change request) should seek to expand the economic capacity and productivity of growth areas to enable communities to be as self-sufficient as possible. An urban town, rather than a shopping centre is a fundamental basis for improved economic performance. The Proposed Plan Change represents the start of this capability in Drury West.

Table of Contents

EXECUTIVE SUMMARY 4

1 Background 8
1.1 Auranga Town Centre 8
1.2 Auranga Town Centre Site Location Influences 9
1.3 Other Potential Town Centre Sites 10
1.4 The Rail Station & Employment 12

2 Catchments & Centres 15
2.1 Housing Yields 15
2.2 Urban Centre Evolution 15
2.3 East & West Catchments 16
2.4 Growth, Jobs & Access 18
25

3 Commercial Demand & Land Use 24
3.1 Retail Demand 24
3.2 Retail Supply 25
3.3 Jobs & Commercial Land Requirements 26
3.4 Land Use Mix on Site 26

4 Assessment of Effects 29
4.1 Demand for Business Land & the AUP 29
4.2 Impacts on Other Centres 30
4.3 Urban Retail & Jobs 31
4.4 Impacts on Other Businesses 33
4.5 Impacts on Residents in the Area 33

5 Conclusions 34
5.1 Growth 34
5.2 Local Context 34
5.3 Regional Structure 34
5.4 Anchor Stores/Concepts 34
5.5 Effects 34

List of Tables & Figures

Figure 1: Auranga Town Centre Proposed Zone 8
Figure 2: Simplifying the Network and Connecting the Rail Station 10
Figure 3: Proposed Town Plan showing Link to Station and Jobs 10
Figure 4: Space Syntax & Drury West Centres Analysis 11
Figure 5: Auranga Centre Assumed Early Catchment 15
Figure 6: Space Syntax Testing Town Centre Connections to Rail - Burberry to Great South Rd Link 19
Figure 7: Hierarchy. Spatial Pattern of Current Metropolitan Centres - South 20
Figure 8: Drury West Area 21
Figure 9: Auranga Town Centre Comprising a Retail Core (Red) and Adjoining Business Land (Blue) 22
Figure10: Auranga Town Centre Proposed Layout 27
Figure 11: Auranga Town Centre Comprising a Retail Core (Yellow Circle) and Adjoining Business Land (Black Circle) 32

Table 1 - Auranga Analysis of TOD & Station Ped Shed Populations 13
Table 2 - FULSS Projections 16
Table 3 - FULSS & KDL Analysis by Development Stage Drury West & East (within the FUZ) 16
Table 4 - Current Catchment Populations & Catchment Growth & Sequence Estimates 17
Table 5 - Auranga Town Centre - Projected Retail-Core Evolution 22
Table 6 - Market Economics Assessment of Jobs in Drury West 23
Table 7 - Average New Zealand Retail Spend Profiles 24
Table 8 - Total Drury West Retail Spend 25
Table 9 - Estimate of Extent of Land Use Areas 27

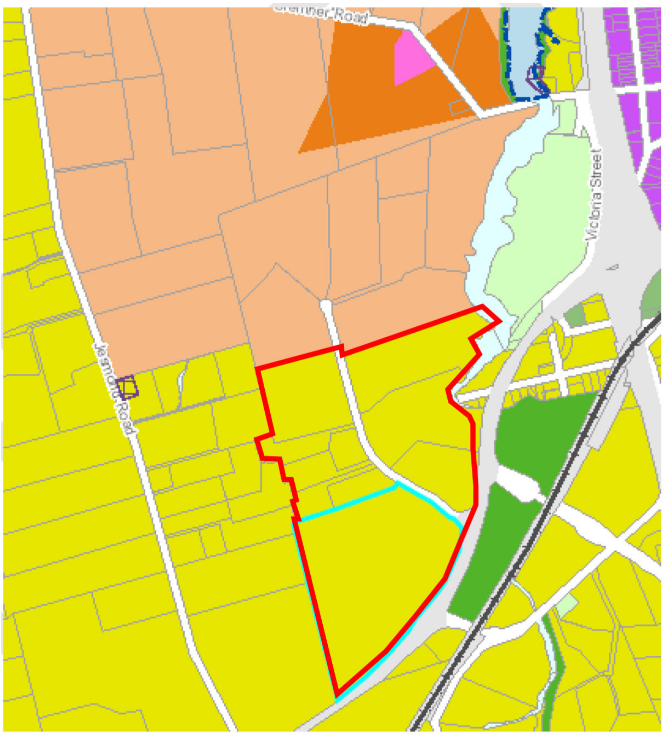
1 Background

The purpose of this document is to outline the rationale for an urban town centre in Drury West (Auranga Town Centre). This section outlines previous work on development yields, employment and assumptions about centre locations and hierarchies.

The proposed Drury West (Auranga) centre sits between Burberry Road and Jesmond Road and in a timed sequence, eventually extends across State Highway 22 and rail line to encompass proposed business zoned land. Karaka & Drury Ltd (KDL) work over the past four years has highlighted the need for jobs in the south. An urban (street-based) town centre's retail component is a facilitator of employment. The eventual Auranga Town Centre is urban (street-based) crosses the rail line and is over 100 ha in size, with a diverse mix of high-density housing and employment.

KDL seeks a zone for its land adjacent to Burberry Road and State Highway 22, to develop a supermarket, specialty shops and other personal and professional services facilities. The site comprises approximately 33.65 hectares of land (see Figure 1).

Figure 1: Auranga Town Centre - Proposed Zone



1.1 Auranga - Town Centre

The centre will begin life as a convenience centre for the growing Drury West catchment. Ultimately, the proposed centre will become an urban (street-based) facilitator of an integrated, mixed-use town centre with an extensive range of high-value jobs. The development approach by KDL is that the centre is urban - not inward-facing as research shows that urban centres deliver more jobs than shopping centres and at higher wage levels.

Research by Urbacity shows that urban (street-based) centres generate five times the non-retail employment (higher value employment) of shopping centres and overall much larger employment totals than shopping centres. In other words, street-based towns are employment-heavy and pay higher wages than shopping centres. When built, Auranga will be the first urban town in NZ for over 100 years.

The Auranga Town Centre and its potential to attract employment provides the following benefits:

- To take the pressure off Auckland's motorway system
- To increase levels of self-containment (goods and services and jobs) in the south of the city
- To complement the city's major airport
- To reduce trips, travel distances and travel times in the south
- To meaningfully increase the economic value and capacity of the south of the City
- To improve the performance of rail by creating a multi-directional station tied to employment density as a centrepoint of the Auranga Town Centre
- To increase public transport use by making the Auranga Town Centre a Transit Oriented Development (TOD)
- To bring a sense of civic to the south through an urban, mixed-use town in a variety of complementary and culturally appropriate styles.

The Auranga Town Centre rail station location was fixed during a process in April 2019 by Penny Pirrit after consultation with landowners and others (Drury Opaheke Structure Plan - Draft 2019). That Plan puts the station at a nexus with the Auranga Town Centre - as indicated in Figure 3.

1.2 Auranga Town Centre Site - Location Influences

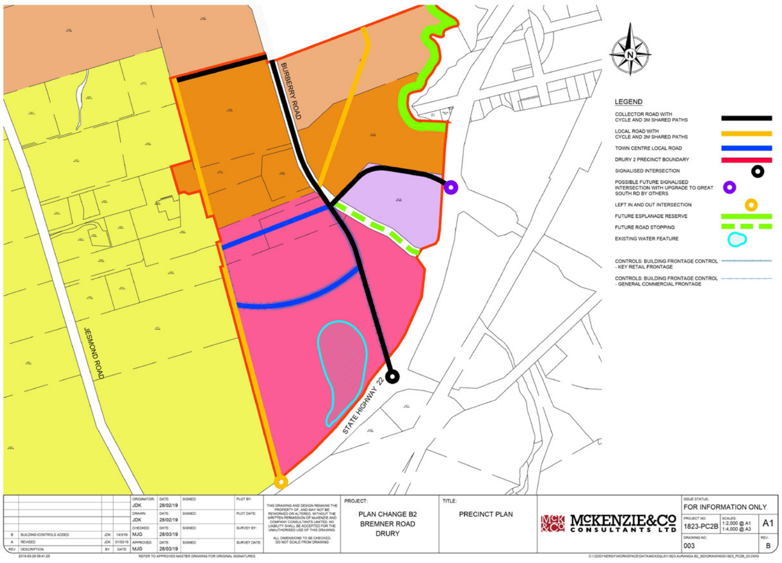
The proposed Auranga Town Centre sits within the Drury West growth area. This area is functionally well defined to its east, due to the barrier of the Motorway, the congested Drury Interchange and access difficulties within the Drury local centre. The proposed Auranga Town Centre catchment is ultimately and predominantly contained within this Drury West area.

Urban design and desired economic outcomes drove the choice of location of the proposed centre:

- The site is toward the eastern edge of Drury West so is best positioned to pull traffic heading north from the arterial. Centre catchments work best with a "home domain" pattern of flow. Home domain is the direction in which most traffic is heading for employment and the purchasing of goods and services;
- The town seeks to ultimately transition across the State Highway to unlock the economic capacity of the land to the south in and around the proposed rail station;
- The site, with slight local network modifications, uses existing infrastructure to connect both sides of the rail and doesn't need additional and expensive infrastructure investment to tie both sides of the rail line together (see Figures 2&3);
- The site is of sufficient size to accommodate growth and deliver additional social and economic benefits to that of a shopping centre;
- The site has the requisite regional and local road hierarchy capable of supporting an

urban town centre.

Figure 2: Simplifying the Network and Connecting the Rail Station



The realignment of Burberry Road to connect directly to McPherson Rd (as shown adjacent) removes the current unsafe offset arrangement between the two intersections at McPhersons and Great South Road.

Independent assessment of site and context performance was undertaken by Space Syntax (London). Their modelling and conclusions are available if requested, but show in diagram form in Figure 4. A benefit of Burberry Road (over Jesmond Road) is that it can be modified to connect directly to the south side of the rail line at no cost to the public. This link will improve the potential for the town centre to grow to the south, to envelope the town's proposed rail station (see Figure 3).

Consultation took place with the community via a series of open days and via the internet in 2017. The community were offered were several location options for the town. The preferred location for the town centre from the consultation was on the subject site (see the possibilities tested with the community as Attachment 14 in Ian Munro's Urban Design Assessment).

Figure 3: Proposed Town Plan showing Link to Station and Jobs

1.3 Other Potential Town Centre Sites

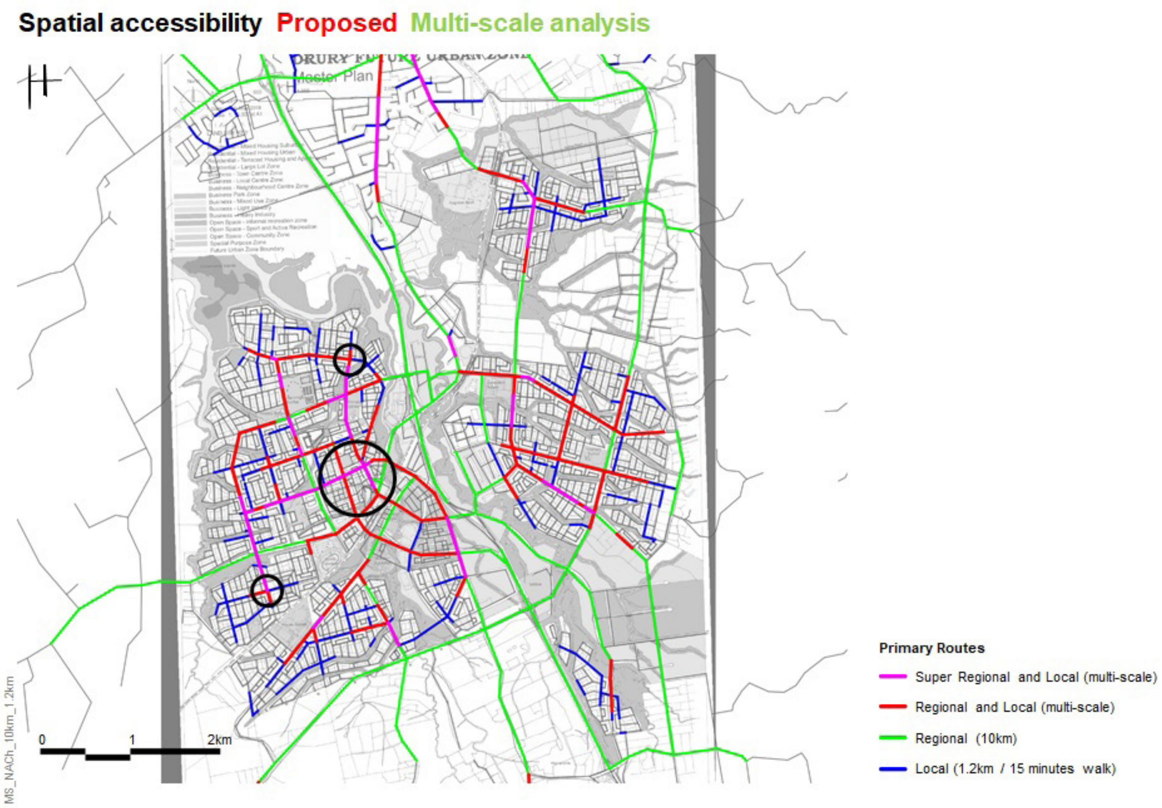
A high level, cross-Auckland study was undertaken looking at growth and transport. The Transport for Urban Growth (TFUG) study proposed a town centre at the south-western extremity of the FUZ in Drury West away from the major north-south and east-west networks. This proposition appeared to determine station separation as the motivator of centre location. Centre location is never driven by rail station dynamics. Indeed rail stations often prove anathema to retail performance. Rail station patronage is also unsupportive of retail demand, and so co-location of stations and centres are for reasons other than for retail. Rail station location in outer Metro locations is usually either housing-focused, with rail passengers leaving in the am peak and returning in the pm peak, or jobs focused with workers arriving in the am peak and departing in the pm peak. The TFUG station had no employment capacity outside of retail.

Space Syntax modelled the broader network to assist KDL to understand the dynamics affecting centre location and performance. The Space Syntax model showed how poorly the Oira centre would perform. The centre is located some distance off the major network and appears located to coincide with station separation distances.

The Space Syntax diagram below shows that an Oira centre would have the same minor accessibility benefits as Auranga's small Bremner Road Centre.

The key in the bottom right-hand corner of the diagram is important. Both the Bremner Road centre (small circle) and the Oira centre are identical in terms of the influence of movement on each centre's role. Oira could only be a local centre (small circle), whereas the Auranga centre is structurally integrated at multi-scale for its role as a town centre (large circle).

Figure 4: Space Syntax & Drury West Centres Analysis



The Auranga Town Centre location ultimately seeks to use the urban qualities of the zone to encourage an urban transition across SH22 and the rail line, capturing the rail station and engaging the land south of the rail line for employment-dominant activities. This land was assumed in TFUG to have a poor housing yield due to flooding (which may have encouraged the movement of the station) however the land is suited to employment uses, which is more accepting of these land constraints. As employment is the most critical sustainability objective for fringe-urban growth (not housing or retail), the town centre zone provides the basis for a longer-term, employment-heavy, town centre definition. The transition, though, will be at least one maybe two decades in the making.

1.4 The Rail Station and Employment

The basis of Peter Calthorpe's Transit Oriented Development (TOD) principles has not always been understood by planners who often see it as a means of increasing public transport use. Calthorpe and sustainable transport planners like Robert Cervero (UC Berkeley) propose TODs as a means of reducing trips, not of growing trips out of an area by public transport. Together, the Auranga Town Centre and its rail station can form a TOD.

The core principle of a TOD is to facilitate employment so that people do not have to leave the area.

A residential development strategy around the station would make it an outbound station (for residents). As likely travel distances are long, this would remove passenger capacity for residents closer to the city, who would be taking shorter trips. As an inbound station (workers coming to the Auranga Town Centre) the likely trip distances will be shorter - making both the TOD and the network more sustainable.

Efficient TOD stations work as origins and destinations for rail trips. That two-way flow proposition is only possible at the Auranga Town Centre station. Trains full in one direction and empty in the other are a reflection of poor land use and transport planning, where the jobs are at one station and the houses at another.

A quality urban environment forms the basis of the character for the Auranga Town Centre. The quality of the urban environment to deliver a TOD is essential for two main reasons:

Universal walkability is important for TOD stations as well as urban centre performance, and therefore the quality of the journey to the station is an influence of TOD catchment size; Attractive buildings and spatial intimacy catering to human-scale environments increase the demand for mixed-use, which also improves walkability to stations.

Research shows that people will walk twice as far to rail stations when there are shops on the journey. Space Syntax has shown where these shops can occur within the town centre (and on both sides of the rail line).

In terms of public transport performance, Newman and Kenworthy showed that with per ha population densities under 30 there is an exponential increase in private motor vehicle use. Newman and Kenworthy have estimated that 35 persons per ha is a reasonable basis for rail[1].

TOD performance is a function of the level to which pedestrian flows are likely (and designed for) within the wider TOD area. TODs are pedestrian-focused. Retail-dominant centres are car-focused.

The population yield describes pedestrian accessibility (Ped Sheds) for rail stations within a 1-kilometre radius of the station. Based on Newman and Kenworthy's research, a Ped Shed-typical 300 ha area should yield a minimum of 35 persons per ha. Estimates of the land use yields of the potential TOD and Station Ped Sheds are in Table 1 below.

Table 1 - Auranga Analysis of TOD & Station Ped Shed Populations

Auranga TOD	**Auranga TOD Population (est)**
Core Retail Area	1,500
Employment Area	6,000
Apartments and Other Housing	2,000
Est Total TOD Population	**9,500**
Land Area Ha(Gross)	180
TOD Persons per ha	**53**
Station Ped Shed Area (Ha)	300
Net Additional Population est	5,000
Station Ped Shed Persons per ha	**48**

The yield analysis shows the potential of the Auranga Town Centre to be rail-supportive.

The core retail component of the Auranga Town Centre sits between Burberry Road and Jesmond Road and in a timed sequence, the land use orientation will transition to employment to extend across State Highway 22 and the rail line to encompass the land to the south (as shown in Figure 3).

The Town Centre proposition reflects the need for towns to evolve. Non-retail employment lags retail employment, and so recognising the sequence is necessary for the centre's planning and economic strategy. The influence of the sequence is growth, urban form, built form, growing the extent of public realm quality and vibrancy.

Auranga technical work over the past 4 years has highlighted the need for jobs in the south, which is reinforced by technical submissions by organisations such as Infrastructure NZ.

Space Syntax modelling also highlights the commercial value of the Burberry Road connection to McPherson Road and the continuing potential to Great South Road (see Figures 4 & 7).

1 Newman and Kenworthy. Cities and Automobile Dependence (1989); An International Sourcebook of Automobile Dependence (1999); and the Millennium Database for Sustainable Transport (2001).

There are infrastructure cost savings through the use of existing connections via a realigned Burberry Road and Great South Road connection to facilitate town centre to grow south, as shown in Figures 3 & 4. All other potential Drury station locations east or west of the motorway require additional government funds to connect both sides of the rail line.

Using the existing connections of McPherson Road and Great South Road will save in the order of $15 million in government construction costs for a cross-rail overbridge somewhere else (where the bridge cannot deliver an employment or density benefit).

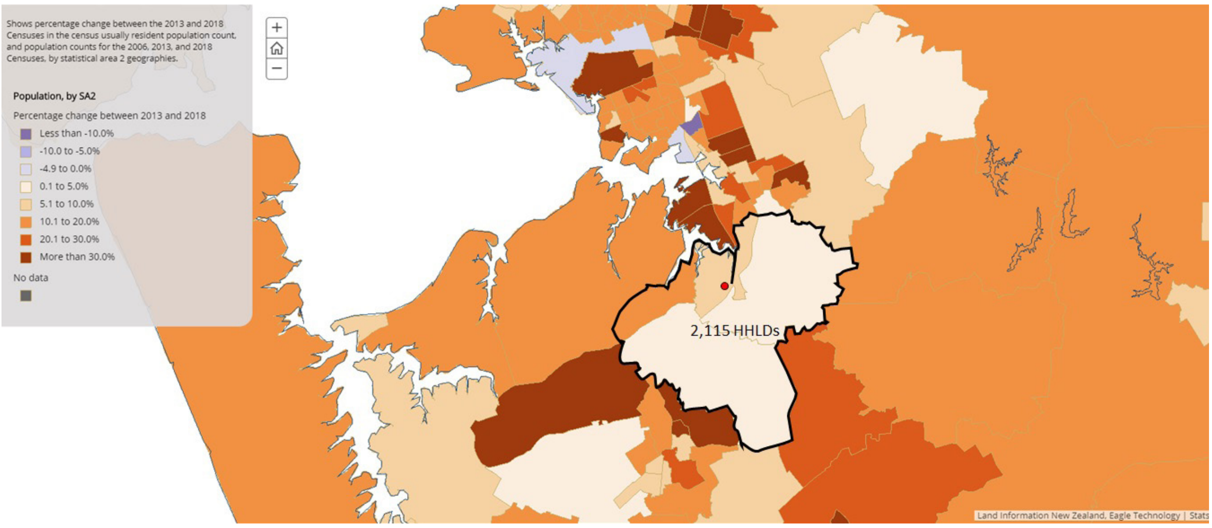
2 Catchments & Centres

The purpose of this section is describe the dynamics that affect the role, size, status and likely evolution of the Auranga Town Centre.

2.1 Housing Yields

The likely yield for Auranga's currently approved two growth cells (Auranga A and B) will be around 2,650+ dwellings. At this dwelling yield, plus existing homes in the area shown in Figure 5 (approximately 2,115 households), a full-service supermarket and associated specialty shops and offices is possible.

Figure 5: Auranga Centre Assumed Early Catchment



At the current level of dwelling productivity on the west-side, the likely residential yield of Drury west will be around 12,000 dwellings. As the threshold dwelling yield for full-service supermarkets begin at approximately 4,000 dwellings, the Drury West area and rural area to the west could eventually accommodate up to 3 supermarkets. As growth continues in Drury West, the size of this centre will increase within the zone proposed.

2.2 Urban Centre Evolution

The form of the centre's retail, commercial and community component is likely to start as single storey buildings with the occasional signature two-storey building holding the key corners. This approach allows the town to "bank" not only service areas (in the form of at grade car parks) but also lower-scale buildings are easier to demolish and replace with higher intensity buildings as the demand grows for more commercial space.

Development of commercial/retail buildings will take approximately 50% of the net retail land area, with parking taking the other 50%. At the early stage, the town centre will be serving predominantly retail and local commercial service demand within a small catchment, as discussed above. Therefore, the form of early development will be relatively inefficient in land utilisation. Also, early, low-scale development does not have the financial capability to deliver decked or underground parking.

A growing catchment will inspire the town's development evolution, and more intensive use of land becomes feasible with single and two-storey buildings replaced by taller and more dense development. Car parking areas can be built within structures, and their former sites redeveloped for more productive activities.'

2.3 East & West Centre Catchments

State Highway 1/Motorway is a constraint to east-west movement. Most of the growth of housing and population will occur to the west of the Motorway. Below are figures produced in Council's Future Urban Land Supply Strategy (FULSS) studies. These figures largely formed the basis of Council's services requirements, which influenced sequencing. KDL was able to design and then negotiate service agreements that allowed Drury West to come forward in the Council's sequencing program. The amended FULSS was adopted by Council and all of Drury West within the FUZ was recognised as being available for development by 2022.

Table 2 - FULSS Projections

	Initial FULLS	FULSS Refresh	Initial FULLS	FULSS Refresh
	Opaheke Drury E	Opaheke Drury E	Drury West	Drury West
Area ha	1,200	1,149	950	1,031
Dwellings	8,000-9,500	8,200	6,100 - 10,800	11,200
Jobs	5,500	unknown	1,000-3,450	unknown

The two FULSS documents vary slightly in dwelling numbers. Generally, the East yield has reduced in the two analysis periods, and the West has increased. As stated earlier, KDL believes that total dwelling yield in Drury West will increase from 11,200 as indicated in the FULSS refresh, to around 12,000. KDL is also well through the civil and site analysis that gives greater certainty over yield per ha. That analysis, when applied to the land in Drury East with the same density as being achieved in Drury West suggests that dwelling yields in Drury East will be substantially lower than the 8,200 assumed in the FULSS (see Table 3 - KDL figure in red).

Table 3 - FULSS & KDL Analysis by Development Stage Drury West & East (within the FUZ)

	FULSS Refresh	KDL
Drury West Stage 1 (North of SH17)	5,550	7,500
Drury West Stage 2 (South of SH17)	5,650	4,500
Total Drury West	**11,200**	**12,000**
Opaheke/Drury (south)	8,200	4,400
Opaheke/Drury (north)	-	1,300
Total Opaheke/Drury	**8,200**	**5,700**
Opaheke/Drury as % of Drury West	**73%**	**43%**

As shown, KDL expects dwelling yields in Drury East to be around 5,700, less than half the yield of Drury West.

The estimated 2018 Census population for Drury East and West is around 3,500 people. The assumed catchment for the Auranga centre allows for trade east of the motorway as a centre in the east is some time away. With the development of a centre to the east, the eastern portion of the assumed catchment will then focus on that centre.

Conversely, the catchment definition assumes a supermarket at Paerata and nor does it account for an assumed 900 households in Drury South.

Before the completion of an eastern centre, substantial development and housing formation will occur in Drury West and also in Paerata and Drury South. The Auranga centre will cater to that growing residential market. Figure 3.shows the assumed catchment.

Development of the centre will initially be retail-focused or retail dominant to serve the growing catchment, as retail demand precedes commercial demand and demand for housing density. Typically, centres in growth areas start slightly ahead of optimum catchment size. The market will determine the timing of the centre, but the first stage can happen now.

The ultimate catchment for this centre will be around 12,700 households or 33,000 people (based on the unlikely assumption that the FUZ never moves westward). The catchment comprises all of the Drury West Future Urban Zone (FUZ), plus existing households outside the FUZ to the west and south as indicated above. The east side catchment ultimately will be catered to by a centre in the east. Therefore, populations in the east that initially use the Auranga Centre will transfer to the eastern centre.

In summary, the proposed Auranga centre's catchment is likely to have a dedicated population of around 33,000. Table 3 shows a likely catchment sequence for the Auranga centre.

Table 4 - Current Catchment Populations & Catchment Growth & Sequence Estimates

Location	Population 2018	Households 2018	Population 2035	Households 2035	Population Post 2035	Households Post 2035
Wider Catchment						
Ramarama	1,917	669	-	-		
Drury	1,197	363	-	-		
Drury Rural	2,763	936	-	-		
Kingseat/Karaka (part)	433	147	-	-		
Total Population & Households	**6,310**	**2,115**	**-**	**-**		
Growth Areas						
Paerata (est)	-	-	7,800	3,000		
Drury South (est)	-	-	2,340	900		
Drury West (est)	-	-	15,600	6,000	33,000	12,700
Drury East (est)	-	-	2,600	1,000		
Auranga Local Centre TA est	**-**	**-**	**28,340**	**10,900**	**33,000**	**12,700**

Source: Statistics NZ Census 2018, Urbacity, Auckland Council

The table shows how a sequence of growth and the development of new centres in both Drury East and Paerata will affect catchment for the Auranga Centre pre and post a nominal 2035. The choice of 2035 as the transition year is arbitrary. It could be earlier or later, and growth could be more or less in this period. The table is not supposed to be an accurate indication of the amount, location and sequence of growth but rather an indication of how the sequencing of growth and the development of centres in Drury East and Paerata might affect the catchment for the Auranga centre over time.

The proposed Auranga Town Centre is to begin life with a supermarket and specialty shops, food and beverage services and personal and professional services and possibly a CoWork Hub. Ultimately, this centre should grow to include offices and high-density residential.

2.4 Growth, Jobs & Access

In Drury West and Opaheke-Drury, the centres that provide the most influence over centre roles in the new growth areas (FUZ) are Papakura and Pukekohe. Papakura is a Metropolitan centre and Pukekohe a Town centre in the Auckland Unitary Plan AUP. Papakura is around 5.4 kilometres from Drury (and is influential for Drury West and East in terms of centre role), and Pukekohe is approximately 13.2 kilometres from Drury and is less influential.

The Unitary Plan defines Metropolitan centres as “second only to the city centre in overall scale and intensity...” It is appropriate that growth should support the role of Papakura, and that competition in Drury should be complementary to its function.

The role of Drury centres have been evaluated based on the following criteria:

1. Locations of future residential populations

On the west side of the motorway, there is an estimated capacity for around 12,000 dwellings in the Future Urban Zone plus an existing 700 dwellings outside of that zone making a total of 12,700. In addition to this figure, there are a proposed 6,000 new jobs in the widely defined Auranga Town Centre. Depending on the rate of development at Paerata, there may be additional households at Paerata that will be catchment for the Drury West centre. Paerata should be able to generate a supermarket-based centre when it completes between 3,500 and 4,000 dwellings. Consequently, around 3,000 dwellings are available to the catchment for the earlier centre at Drury west (Auranga centre) before the completion of the Paerata centre and supermarket.

There is the capacity for around 7,900 dwellings (using our estimates and including Drury South) in the Future Urban Zone, which a Drury East centre can serve. However, some 1,300 (estimated) dwellings are adjacent to Papakura. So that actual dwelling yield using the above numbers is 6,600.

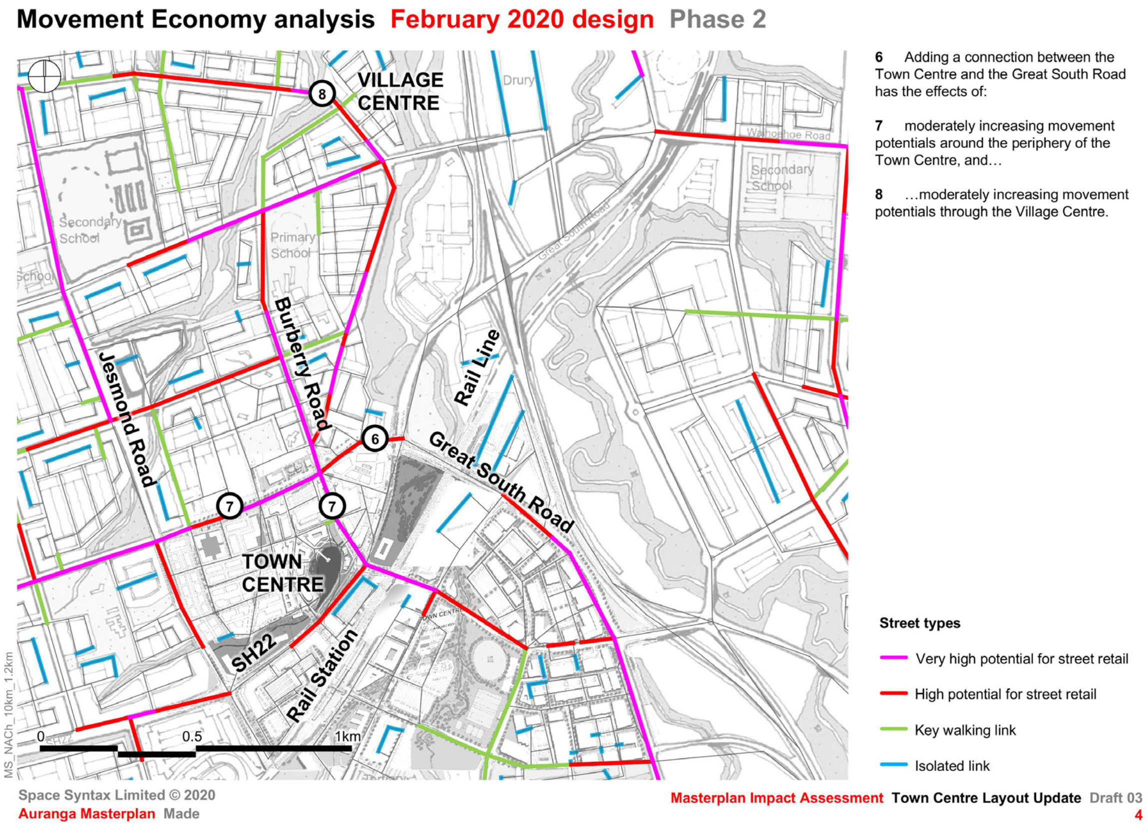
2. Regional Accessibility & Jobs

There is only one primary road link between the east and west sides of the Southern Motorway in the Drury area – State Highway 22. It has significant congestion and limited potential exists to take additional vehicle traffic through the Drury Interchange. Given that the majority of the Opaheke Drury catchment and traffic movement is west of this interchange it is appropriate to confine centre catchments to each side of this interchange to reduce stress on the interchange. The Auranga centre will remove traffic from SH 22 before the interchange. Ultimately, the Auranga centre will reduce traffic flows out of the

Franklin area. Studies by Richard Paling Consulting in 2014 shows average commuter travel out of Franklin is over 21 kilometres (compared to the Auckland average of 11.8 kms) with more than 95% of these trips by private motor vehicle.

Space Syntax analysis shows that the proposed Auranga Town Centre site in Drury West has excellent regional and local accessibility, reducing the need for longer travel distances. *“The greatest potentials for street-based retail in the Town Centre are on the north south alignment of Burberry Road. This is because Burberry Road connects more continuously and frequently into the wider movement network than any other alignment, gathering shorter- and longer-distance movement and channelling it along its length.”* Space Syntax.

Figure 6: Space Syntax Testing Town Centre Connections to Rail - Burberry to Great South Rd Link

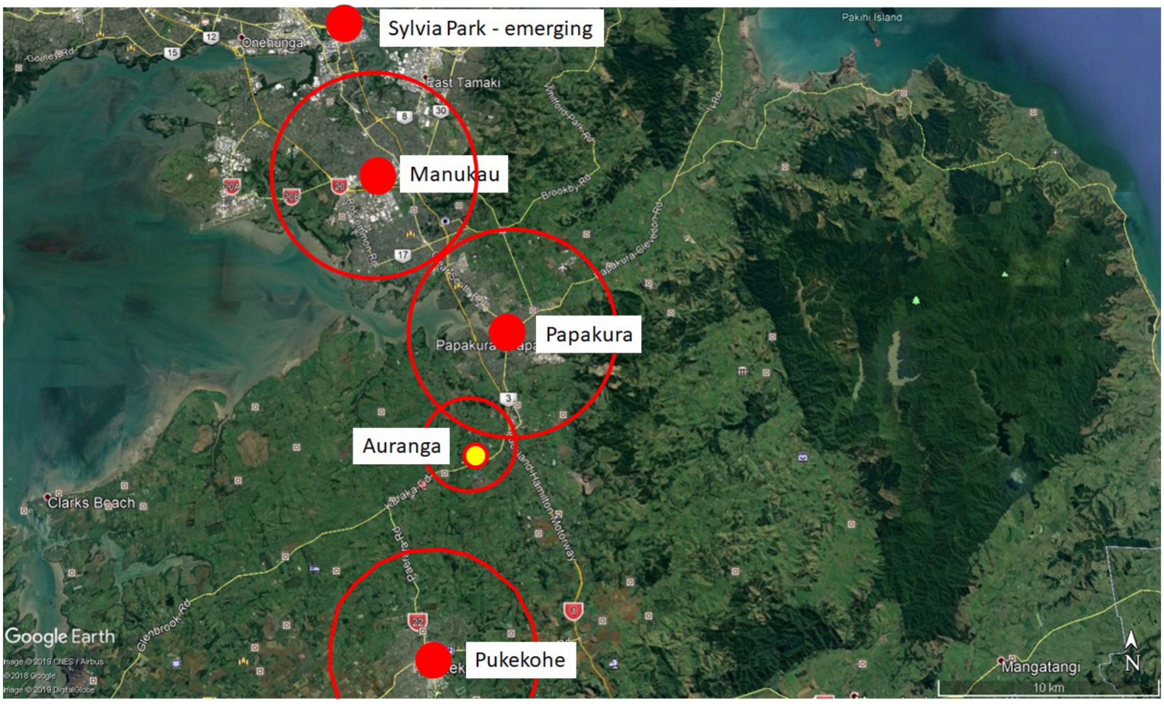


3. Locations of Other Centres

The size of the market that will be served by each potential centre will be determined significantly by the positions of existing and planned centres in the surrounding area. Centres in Drury are subservient to Papakura and Pukekohe.

In the longer term, the market proposed to be served by the Auranga centre in Drury West is the future population of this local area. This approach leaves the Council’s centre hierarchy intact.

Figure 7: Hierarchy. Spatial Pattern of Current Metropolitan Centres - South



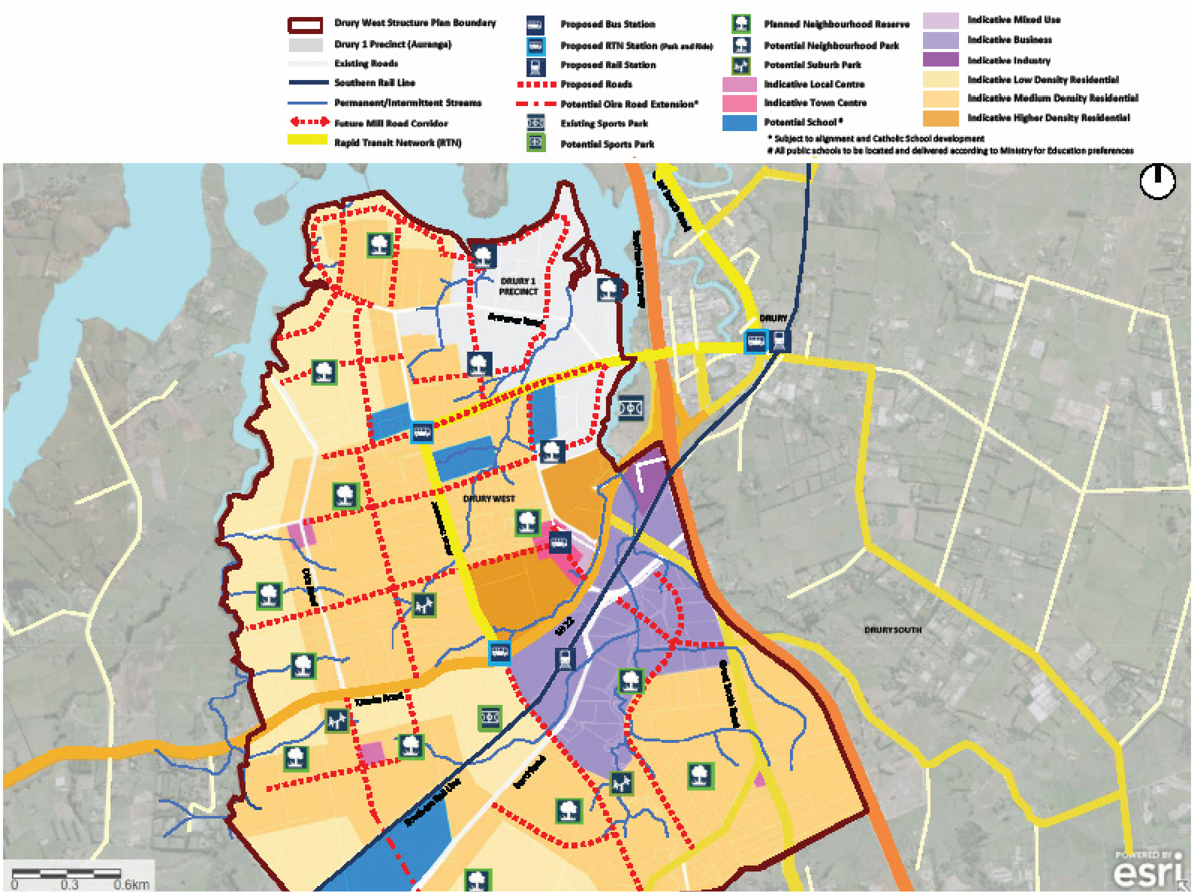
4. Market Size for Auranga Town Centre (Drury West)

The proposal is to develop a centre with at least one supermarket and associated shops at Auranga between 2021-2023. The centre's forecast main trade area will be the area for which it is the most convenient centre. Planned local centres will limit the town centre's trade area at Hingaia to the north, and by the Paerata urban area to the south-west.

Post-2028, the FULSS shows the development of Opaheke Drury East. When this area delivers the requisite quantum of housing, the development of a centre can take place. Until a centre opens in the east, the Auranga local centre will be the most convenient local centre for residents of Drury East despite the constraints presented by SH 22 and the motorway. Consequently, until a centre at Drury East is trading, the Auranga centre will cater to existing residents of Drury East. After the Drury East centre opens, the trade area of the first stage of the Auranga Town Centre will be limited to the west side of the Southern Motorway.

Alongside Auranga A & B, the current populations in Drury west, Drury east and Drury south, enable the development of the Auranga centre. Post-2028, when Drury east is beginning to develop, the Drury east and Drury south catchment components will divert to a centre in Drury east. Drury west catchment households will continue to grow to 2048 totalling around 12,700 dwellings (including households outside the FUZ) at build-out, with an estimated 12,000 dwellings of this catchment will be within the Drury West growth area, as shown in Figure 8.

Figure 8: Drury West



For employment-heavy town centres, there is limited capacity to accommodate a large number of what retail consultants call “large format retail,” selling comparison (not everyday) goods such as furniture, white good and electronics etc. Large format retail centres have become an integral part of the retail scene. For town centres, other than such items in department stores, large format retail tends to deplete the intensity of urban activity and diminish the quality of the urban environment.

The Auranga centre would struggle to accommodate many of the tenants of a large format centre (such as Harvey Norman, Noel Leeming, Briscoes, Rebel Sport, Freedom Furniture, The Warehouse, etc). Similarly, hardware stores would be inappropriate in an urban town centre. Larger format stores of the type mentioned above can be accommodated elsewhere in Drury.

The Auranga centre could easily accommodate at least two supermarkets, a department store (such as Farmers), and one other larger format store selling fashion or similar goods, suited to an urban (street-based) environment.

The Auranga Town Centre Development Sequence (excluding infrastructure)

1. Develop the retail and services component of the town centre around the street network and the town lake to a level of high amenity;
2. Develop high density housing around the town centre to reinforce the wider walkable condition to and around the town centre and start developing a night-time economy;
3. Develop the second stage of the retail and service component of the town centre to

increase vibrancy;
4. Develop incremental office/Co-Work etc around the town centre to widen employment opportunities and reduce jobs leakage;
5. Develop office sites within and adjacent to the town centre as the catchment grows so as to take advantage of the proximity of the rail station;.
6. Facilitate a transition of employment to and around the rail station and on land more suited to office and commercial development south of the rail station/rail line.

This proposal is for a specific site area of 15 ha, west of Burberry Road and The following table outlines a possible sequence of retail development in the Auranga Town Centre.

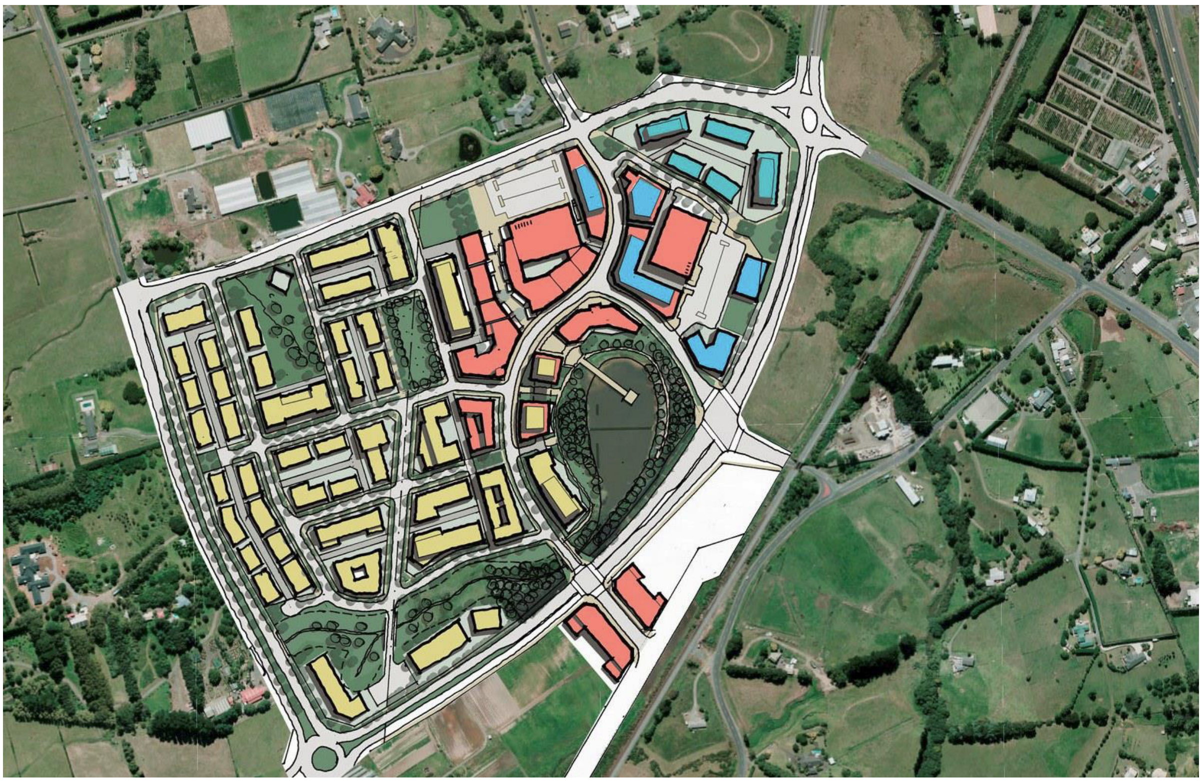
Table 5 - Auranga Town Centre - Projected Retail-Core Evolution

	2021-2022	2035	2048
Auranga Town Centre Space Estimates	Est GLA	Est GLA	Est GLA
Est'd Town Centre Floorspace Sequence	7,000-10,000	10,000-15,000	25,000-30,000
- 1 supermarket plus specialties and services	3,500+/-		
- 1 more supermarket plus specialties and services		3,500+/-	
- 1 or more department stores plus specialties and services			6,000+/-

The town centre will develop around the existing lake on the site, as shown in the plan below.

The retail core of the town centre would encompass the lake with the complete town centre transitioning across State Highway 22 (Karaka Road) to commercial (office) and residential accommodation in and around the proposed rail station, with the town extended on land further to the south of the station (Figure 9).

Figure 9: Auranga Town Centre Comprising a Retail Core (Red) and Adjoining Business Land (Blue)



Auranga's urban town centre is of the same family as other major urban centres in New Zealand and is similar in its characteristics (but not necessarily status) to Newmarket, Auckland CBD, Takapuna, Pukekohe, Hamilton etc. It is not similar to St Lukes, Sylvia Park, Westfield Albany or any other retail-dominant shopping centre in New Zealand.

The Auranga Town Centre is proposed to be employment-heavy, not retail-dominant and its streets and walkable spaces are to be public, not private.

In addition to its analysis and benchmarking, KDL appointed Market Economics (ME) to undertake an assessment of jobs based on an earlier Masterplan for the Auranga Town Centre with a slightly smaller business area/zone. Their assessment estimated 9,400 jobs, with 7,000 of those jobs in the broader Auranga Town Centre (Table 6).

Table 6 - Market Economics Assessment of Jobs in Drury West

Employment Yield in FUZ Land	**Auranga + Business Park**
Auranga Business Land	**Jobs**
Town Centre	928
Local Centre A	53
Local Centre B	53
Business Park	6,000
Total Auranga Business Land	**7,033**
Non-business land	
Residential (home office etc)	1,585
Schools	
Preschool	131
Primary	293
Secondary	303
Recreational	33
Religious	28
Total Non-Business land	**2,373**
Total Employment - Auranga Environs	**9,406**

Note: The term "Business Park" is used by ME. This area is a part of the Auranga Town Centre and is proposed as urban, unlike a typical business park.

ME separated the land area into Retail (town) and Business Park (town). ME assessed the size of the Business Park at 60 ha net, which is around 30 ha less than the proposed area south of SH 22.

3 Commercial Demand & Land Use

The purpose of this section is review growth and the demand for retail, commercial and community services.

3.1 Retail Demand

The first commercial stage of the town centre is its retail component. Demand for this activity aligns with growth and population threshold requirements of the supermarket operators. The commercial component could, however, begin life as a comprehensive and well-designed, high amenity, dining destination. Nevertheless, traditional lenders are less likely to favour such a development response. This report assumes that the town centre will begin life as a primarily retail destination and grow its mixed-use and residential density as the values flow from urban vibrancy as the centre matures and expands.

There are unlikely to be any material influences over the spending power or behaviour patterns of these residents that would affect or skew the retail or centre development strategy given the size of the Drury West area is large (over 1,000ha).

For this retail floorspace assessment, we have assumed that these residents will generate demand for around 2 square metres per person. Therefore, new residents in Drury West will require 66,000 square metres of retail - somewhere. This projection is conservative as in many New Zealand municipalities, the floorspace ratio per person is higher.

Around 30% of all New Zealand annual retail spend per capita is consumed in supermarkets and grocery stores (excluding motor vehicles, parts and fuel).

Table 7 - Average New Zealand Retail Spend Profiles[2]

Expenditure Category	**Annual $ per capita $2020**
Supermarket & Grocery	4,284
Food & Beverage Services	2,415
Building Supplies, Furniture & Housewares	2,266
Department Stores, Clothing, Footwear & Accessories	1,856
Chemist & commission based retailing	1,543
Electrical goods, electronics & recreational goods	1,245
Specialised food and liquor	698
Total	**14,307**

The projected Drury West catchment population is 33,000. Table 8 shows spend projections

2 Dynamic Retail - An Overview of the New Zealand Retail Market, RetailNZ 2018

for Drury West residents at full build-out.

Table 8 - Total Drury West Retail Spend

Expenditure Category	Annual $m $2020
Supermarket & Grocery	141.3
Food & Beverage Services	79.7
Building Supplies, Furniture & Housewares	74.8
Department Stores, Clothing, Footwear & Accessories	61.2
Chemist & commission based retailing	50.9
Electrical goods, electronics & recreational goods	41.1
Specialised food and liquor	23.0
Total	**472**

Source: RetailNZ. Urbacity, Auckland Council

Discussions with supermarket operators show that average economic throughput rates for grocery stores is around $8,200 per square metre Gross Leasable Area (GLA). On that basis the Auranga Town Centre catchment would generate demand for 17,000 square metres of supermarket floorspace. However, metropolitan markets are complex and so a major portion, but not all supermarket expenditure, would be retained within Drury West.

There are smaller local centres within Drury West, with one already provided for on Bremner Road. Likely the supermarket and grocery supply outside of the proposed Auranga Town Centre would be between 4,000 and 5,000 square metres. Two or three supermarkets in the Auranga Town Centre would total between 7,000 and 11,000 square metres, with only one of these likely within the next 5-8 years. The timing of a second supermarket would depend on the rate of growth in Drury West.

3.2 Retail Supply

As discussed earlier, the proposed town centre is to be urban or street-based, not a single purpose shopping centre. The centre will grow and intensify over time.

As the urban qualities of the centre are fundamental to its long term evolution, it is inappropriate to include large format retailers such as furniture stores and hardware stores in the centre as they compromise the intensity and vibrancy of urban centres. These retailers will need to locate elsewhere in the area.

The likely first stage of the retail component of the town centre will comprise a single supermarket, associated specialty shops and services, around 7,000 - 10,000 square metres GLA. The centre will grow to match catchment growth to around 25,000-30,000 square metres GLA.

With the high likelihood of future growth beyond the FUZ, there is a further growth phase possible beyond the FULSS timeline.

3.3 Jobs and Commercial Land Requirements

The ability to provide jobs in the south is fundamental to sustainability, as well as improved physical and mental health.

Jobs provision should seek to reduce travel by providing the broadest possible range of jobs close to or within Drury West. There are projected to be 13,800 new jobs with the addition of the Drury South employment, for the projected 12,900 dwellings in Drury West and Drury South. This total is around 89% jobs self-sufficiency for the new residents.

The West Franklin and Drury Future Business Land Assessment (June 2018), has assessed that growth in the wider defined Drury catchment would facilitate a **total** requirement of around 92 ha of commercially zoned land by 2048.

This report states that there is 20ha of vacant land in the “Karaka/Hingaia” node. This area is not within the catchment for the proposed Auranga Town Centre and nor does it have a primary relationship with Drury West. Karaka/Hingaia is more directly linked to Papakura. This area has limited growth potential, and we see little association between the areas of Drury growth and Hingaia.

The report’s catchment definitions might have appropriately referenced movement network showing strong associations between Karaka Hingaia, the southern edge of Manukau Harbour and Papakura - not Drury. We see little point in removing the 20ha of vacant land from the Drury area as there is limited growth projected for Karaka/Hingaia and poor access between the Drury growth areas and Karaka/Hingaia. However, after removing the Hingaia land, the report concludes that the Drury catchment is still deficient by 72 ha in the provision of commercial land by 2048. The report identifies the need for additional business land in and around Drury. This land is required not only to service growth, which would only deliver around one-third of the total employment requirement but also to generate a major employment destination in the south to offset the dominant journey-to-work flows out of the area to the north. As discussed earlier, an urban centre, with its start point as the zone that is the subject of this Proposed Plan Change is influential in facilitating this outcome.

The report confirms previous KDL findings that the Drury East and West areas require substantial commercial floorspace to reduce reliance on commercial and industrial locations to the north.

3.3 Land Use Mix on Site

The proposed zone area for the town centre is 15.5ha. The Plan shows the general area layout.

Figure10: Auranga Town Centre Proposed Layout

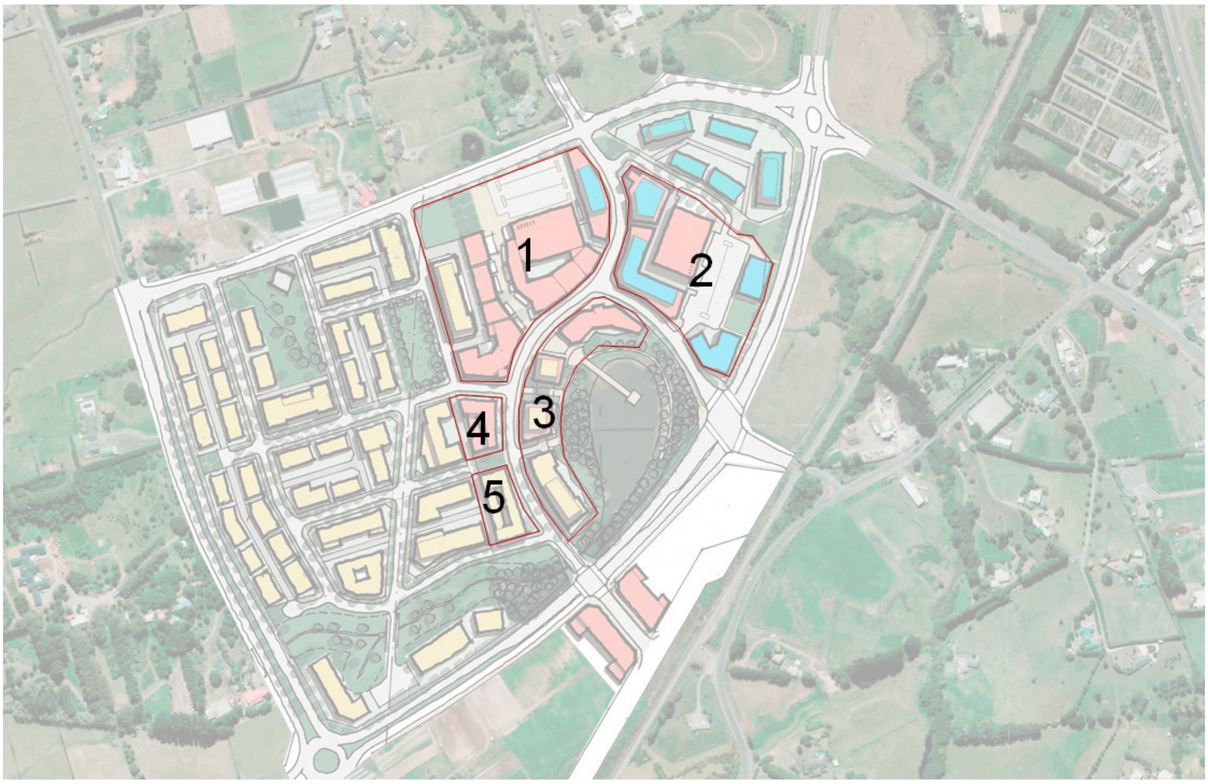


Table 9 provides estimates of land use areas at build-out within the proposed zone.

Table 9 - Estimate of Extent of Land Use Areas

Land Use Element	Area Est ha
The Lake	2.0
Streets	4.0
Core Retail	3.0
Parking	3.0
Commercial	1.0
Housing	1.0
Community/Emergency Services*	0.5
Urban Square/Lake edges	1.0
Total	**15.5**

Note: The Core Retail area provides for around 25,000 square metres GLA, but includes site and service areas not counted in the GLA. "Community" is child care, possible Council service centre and/or library etc. This "Community" figure is a provision so could be larger or smaller.

We have assessed the following categories of potential effects of the Proposed Town Centre:

1. The potential loss or gain of trade for nearby centres;

2. Levels of employment and goods and services self-sufficiency in and around Drury West;

3. Direct impacts on other businesses and centres;
   - Whether businesses in the area are advantaged or disadvantaged by future activities on the Site.

4. Direct impacts on existing and proposed future residential settlements in the area and whether the Town Centre has a positive or negative influence on existing or proposed residential areas in and around Drury;

5. Positive effects of the Proposed Town Centre and whether the Town Centre contributes to the economy of the south and Auckland more generally.

4 Assessment of Effects

The purpose of this section is evaluate the effects of the Auranga Town Centre on economic activity within the region.

4.1 Demand for Business Land & AUP

Urban towns outperform shopping centres in terms of economic output and in terms of numbers of jobs and diversity of jobs. Research by Urbacity shows that urban (street-based) centres such as Auranga generate on average five times the non-retail employment of shopping centres as well as considerably higher total employment. This research also shows that street-based towns pay substantially higher average wages than shopping centres (studies on over 100 centres across Australia and New Zealand).

The Auckland Unitary Plan (AUP) Chapter B2 Urban Growth and form promotes a compact urban form, that enables higher productivity and economic growth. This means that proposed plans (such as this Proposed Plan Change) should seek to expand the economic capacity and productivity of growth areas to enable communities to be as self-sufficient as possible. An urban town, rather than a shopping centre is a crucial basis for improved economic performance. The Proposed Plan Change represents the start of this capability in Drury West.

By connecting the proposed Auranga Town Centre to rail, the significant economic opportunity exists for the south side of the rail line to be rezoned to accommodate business activity. A business zone here will offer improved performance for rail - with inbound passengers in the am peak.

The alternative to this approach is a lack of proximate centres and associated business land, resulting in departure of residents to other places in the city for goods and services and employment. This pattern of development is known as sprawl.

The Proposed Plan Change is supportive of the AUP chapter on Urban Growth and form. The AUP's Business – Town Centre Zone H10.2. Objectives for all centres states:

1. *A strong network of centres that are attractive environments and attract ongoing investment, promote commercial activity, and provide employment, housing and goods and services, all at a variety of scales.*
2. *Development is of a form, scale and design quality so that centres are reinforced as focal points for the community.*
3. *Development positively contributes towards planned future form and quality, creating a sense of place.*
4. *Business activity is distributed in locations, and is of a scale and form, that:*
   (a) provides for the community's social and economic needs;
   (b) improves community access to goods, services, community facilities and opportunities for social interaction; and
   (c) manages adverse effects on the environment, including effects on infrastructure and residential amenity.

5. A network of centres that provides:
(a) a framework and context to the functioning of the urban area and its transport network, recognising:
(i) the regional role and function of the city centre, metropolitan centres and town centres as commercial, cultural and social focal points for the region, sub-regions and local areas; and
(ii) local centres and neighbourhood centres in their role to provide for a range of convenience activities to support and serve as focal points for their local communities.
(b) a clear framework within which public and private investment can be prioritised and made; and
(c) a basis for regeneration and intensification initiatives.

Business Town Centre Zone objectives

6. *Town centres are the focus of commercial, community and civic activities for the surrounding area and which provide for residential intensification.*
7. *The scale and intensity of development in town centres is increased while ensuring development is in keeping with the planning and design outcomes identified in this Plan for the relevant centre.*
8. *Town centres are an attractive place to live, work and visit with vibrant and vital commercial, entertainment and retail areas.*
9. *Key Retail Frontage streets are a focus for pedestrian activity, with General Commercial Frontage streets supporting this role.*

Any regulatory instrument has not achieved the development of an urban centre in Auckland within the past 100 years.

The Proposed Plan Change is most supportive of the AUP Chapter H10 Business - Town Centre Zone.

4.2 Impacts on Other Centres

There are three centres within the influence of the growth area, except for the pending Bremner Road centre that sits within the Drury West (Auranga) development area. The centres are:

- Papakura (Metropolitan centre)
- Pukekohe (Town Centre)
- Drury (Local Centre)

The Proposed Plan Change is for a centre at the Town Centre scale. It will provide additional resources for the current Drury community as well as growth within Drury West (and initially south and east) as outlined in Table 4.

4.2.1 Papakura

The Papakura centre is at a higher level in the centre hierarchy within the AUP and so its higher-order retail, commercial and community facilities will benefit from growth in Drury. The Auranga Town Centre will not provide these higher-order facilities. Growth in

Drury West provides a growing market for these higher-order facilities within a town that at present is struggling. The Auranga Town Centre is complementary to Papakura. The only threat to the Papakura Metropolitan centre would be a major retail centre in Drury that catered to a market that would be greater than that which is attributable to growth. The retail component of the Auranga Town Centre is designed to serve the growth in Drury West and will provide less than 50% of the demand for retail attributable to the Drury West population. The balance of that demand will go elsewhere, including to Papakura.

4.2.2 Pukekohe

Pukekohe is some 13 kilometres from the proposed centre. The centre is of the same status as the proposed Auranga Town Centre. Pukekohe would have a slightly larger core retail catchment than the proposed Auranga Town Centre. We assess this catchment at around 40,000. Pukekohe is a more mature centre with a significant component of department store-type merchandise. The extent and diversity of mix in Pukekohe will largely insulate it from any competition from the more convenience-based or supermarket-focused mix that is the subject of the Proposed Plan Change. Also, the proposed Auranga centre will be catering to growth - not seeking to provide for existing catchments of other centres.

4.2.3 Drury

Three separate sites define Drury Local Centre, none of which are adjoining. The small centre is focused on the immediate convenience needs of local residents and workers. The mix of the centre includes a grocery store, pharmacy, café, butcher, fruit shop, hairdressers and takeaways.

This centre will benefit to an extent from additional and substantial population growth in Drury West, particularly from increased passing trade. Growth in Drury West and East may require modification of the mix of the centre in future.

4.3 Urban Retail and Jobs

The Auranga Town Centre is the urban inspiration for a range of benefits only some of which are economic. The New Zealand focus on “centre hierarchies”, which are in fact not centre hierarchies but retail hierarchies has skewed the “economic” basis for centre planning. Typically, economic analysis around these “centres” has been specific in its detail to retail - not the ability of retail in an urban form to attract jobs.

The Urbacity studies mentioned earlier have found a nexus between urban streets activated by shops facing streets and much higher levels of employment. However, the economic benefits do not stop with employment. Urban centres are also attractive to higher-density housing, whereas car parks and blank walls of supermarkets or shopping centres are not.

Urban centres directly comply with and achieve the principles and objectives of the centre-based provisions in the AUP. Shopping malls and centres do not. The Urbacity research shows that for every two retail jobs in a shopping centre there is only one non-retail job. In urban centres the non-retail jobs rise to five per two for retail. This is important for economic productivity as retail and food and beverage services are the lowest paying jobs in the economy (so why stop with just retail analysis). Planners and economists have consistently failed to connect urban form to economic output.

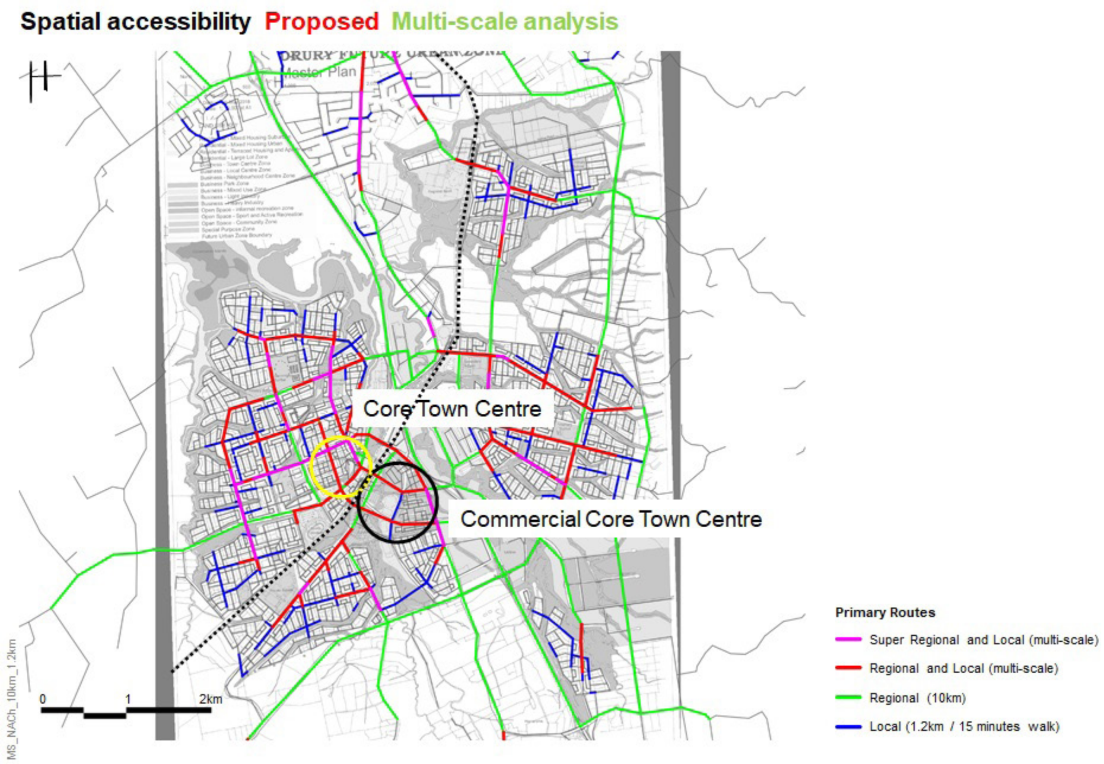
It is in the interests of communities to develop urban centres to broaden and increase jobs numbers and thereby increase economic output with more and higher paying jobs.

Urban centres are “inefficient” in terms of pedestrian movement, as they require customers to walk further to undertake the same tasks. As urban centres are open, not closed systems, urban centre retail “fails” as distance increases from a central point or core. It is impossible therefore, to “overbuild” the retail in urban centres if buildings address the street and do not turn inward. Centre hierarchies are a product of mid to late 20th-century planning. Previously, on the basis of volumes and coincidences of vehicular and pedestrian traffic (together), centres evolved naturally in scale. Shopping centres removed pedestrians from the equation, catering solely to cars. That allowed these facilities to overcome the urban dynamics of movement networks through the building of large, single-use, destination developments called shopping centres.

The proposed centre is urban and, in its urban condition, will naturally find its retail capacity limit - unlike a mall.

The point of this topic is that by design, the network and the built form generate the settings for a more comprehensive employment story that is more in line with various AUP objectives and policies. This aligns with the Council’s assessment of the requirement for business land in the area. The benefit of the design of the contributing street network in and around Drury West is that it allows for urban growth and movement energy to switch on employment capacity across the rail line, as shown in Space Syntax modelling of the network in Figure 9.

Figure 11: Auranga Town Centre Comprising a Retail Core (Yellow Circle) and Adjoining Business Land (Black Circle)



Space Syntax modelling shows that the network established by the Auranga Town Centre with direct connections under and over the rail line turn the network red. A red network in Space Syntax modelling at Multi-Scale offers the potential of street-based retail. The effects are positive in terms of the economy of the south and of Auckland generally.

4.4 Impacts on Other Businesses

The Proposed Auranga Town Centre will provide the urban settings for a wide range of businesses in the south. This provides opportunities for existing businesses that would prefer an urban setting to move. As the centre is catering to growth, there will likely be increased demand for services for existing businesses. Other than potential retail-only effects, we are likely to see the slow evolution of non-retail employment growth (positive business growth). The main point is that the centre is to serve growth - not cater to existing markets. This growth also offers an expanded range of opportunities for existing businesses.

4.5 Impacts on Residents within the Area

The proposed centre will provide improved access to a broader range of goods and services for existing residents of the area in a more convenient location. While the rural context of the site will change, the new urban character, parks and foreshore walks etc. will provide a more accessible water's edge and different open space settings than merely that of a rural outlook.

4.6 Positive Impacts from the Proposed Town Centre

There is a range of positive economic effects consequent to the establishment of the proposed centre.

- It will shorten existing trip distances in the area for goods and services;
- The proposed centre will be a catalyst to density and diversity of housing;
- The proposed centre will be a catalyst to density and diversity of jobs;
- Subject to appropriate architecture, the proposed centre could be a future cultural icon of New Zealand;
- The urban nature of the proposed centre will provide a greater incentive for people to walk to it (generating environmental and health benefits).

5 Conclusions

5.1 Growth

The proposed centre in the town centre zone is required to cater to growth in Drury West.

5.2 Local Context

The proposed centre is capable of facilitating a broader employment yield over an area that is wider than that contained within the Proposed Plan Change. The urban and network design of an urban town linked to a rail station as the basis for a significant employment zone is a proposition unseen in Auckland over at least the past 100 years.

5.3 Regional Structure

The site is irrigated by movement along SH22, which requires it to be positioned toward the eastern edge of the Drury West growth area (FUZ). Ultimately, there are likely to be significant changes in movement flows in the wider region as growth will continue to the west (beyond the FUZ). One of these changes is the Mill Road extension, which will reduce traffic on SH22 and improve the opportunity for integration across it. However, that condition is some time away and is not pertinent to this application.

The proposed centre will remove traffic from SH22 before it hits the problematic Drury interchange.

5.4 Anchor Stores/Concepts

The proposed centre will attract a supermarket as its likely first anchor. The developer is considering other anchor concepts such as an eat street, co-work hub and hotel as early contributors to town centre diversity. None of the non-retail concepts proposed have any material effects on other centres.

5.5 Effects

The proposed centre is responding to growth and has been anticipated in various Council and agency documents.

Increased travel distances and greater levels of congestion on the motorway and Great South Road and greater wait times through the Drury interchange will be amongst the effects of not having the Auranga Town Centre.

The first development phase of the proposed centre will provide daily and weekly resources for the defined catchment.

AURANGA

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