Glenbrook Economics Report

80 McLarin Road

11 April 2022 – Final

m.e
consulting

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Prepared for

Harrison Grierson

Contents

Figures

1 Introduction

Market Economics Ltd (M.E) has been commissioned by Harrison Grierson to provide information that will support a private plan change for an 8.197ha property at 80 McLarin Road, Glenbrook, Auckland. The key areas of focus of this market assessment are to provide an understanding of residential supply and demand within the current environment. In particular, this is translated into an assessment of the amount of supportable commercial land which is likely to be required at the adjacent neighbourhood centre, to identify whether any further commercial land would be required. In addition, an estimated profile of likely occupation of the development is used to assess any likely impact on local schools.

1.1 Background

A private developer has engaged Harrison Grierson to prepare a private plan change request for an 8.197ha property at 80 McLarin Road, Glenbrook, from Future Urban to an urban residential land use zoning. It has been identified that the site could yield between 55 and 100 dwellings, but only if a portion of the site is zoned Residential-Mixed Housing Suburban. The developer has asked whether a higher density residential use could be achieved on the site.

1.2 Objectives

The key objectives of this report are to provide market intelligence about:

- The likely residential demand by typology in Glenbrook, especially for higher density types.

- The impact that the increased residential density would have on public schooling in the area.

- The level and timing of commercial land demand in Glenbrook, and the amount of floorspace that will be required for retail and other activities by the future population.

2 The Proposed Development

2.1 Development Overview

The proposed development site ("the site") is located at 80 McLarin Road, Glenbrook (see Figure 2.1 below). The site is 8.197ha and is currently zoned Future Urban under the Auckland Unitary Plan (AUP). The site is relatively isolated from the rest of Franklin, but forms a natural extension to the Glenbrook Beach development. It is situated on the Glenbrook Beach peninsula between the Waiuku and Taihiki River, 15 minutes north of Waiuku and 25 minutes west of Pukekohe. In terms of site topography, the south-west corner of the site is steep while the rest is relatively flat. Wetlands are located in the south-west and north-west areas of the Site with a potential third wetland classification in the northern corner. No build zones within the site are generated by topography (steep and hilly) and the wetlands.

Figure 2.1: 80 McLarin Road, Glenbrook

Adjacent to the site is Kahawai Point, a Special Housing Area (SHA) encompassing 65ha of land. The masterplan for Kahawai Point yields around 800 dwellings ranging from one to two storey houses and villas with section sizes from 300m^2 to 2,200m^2.[1] Residential lots for the first two stages of the project have been sold with future stages underway and in planning. Sub-precinct A of the Glenbrook SHA, located in the

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[1] https://www.kahawaipoint.co.nz/

southwestern corner of the SHA, provides for a broader range of housing typologies with a focus on papakāinga housing[2], housing for the elderly and other forms of intensive group housing.[3]

East of the site at 80 McLarin Rd Road, sitting within the SHA, there is a small block (c. 0.4215ha) of commercial zoned land proposed for a neighbourhood centre. This is the only commercial space in the entire Glenbrook development area (the SHA, plus the existing residential bits), meaning that it will fulfill an important convenience goods role for the community that are already established here – and in future.

It is proposed that a Residential-Mixed Housing Suburban zone covering a portion of the site will allow for higher density typologies, increasing the yield total closer to 100 dwellings. Higher density potentially would be located on the north-western and north-eastern parts of the site (Figure 2.2 areas 2 and 3), but this is contingent on a wetland classification. It is anticipated that 2024 would be the earliest development commencement for the site, subject to any consenting delays.

Figure 2.2: Potential site density layout, slope analysis[4]

1. Area of mixed use potential.*
2. Potential for higher density.
3. Flexible lots - 30m back to back.
4. 600m² - 450m² lots stand alone.
5. 600m² lots
6. Steep slopes larger lots.
7. No development - wetland.
8. Large lot single house.
* Contingent on wetland classification.
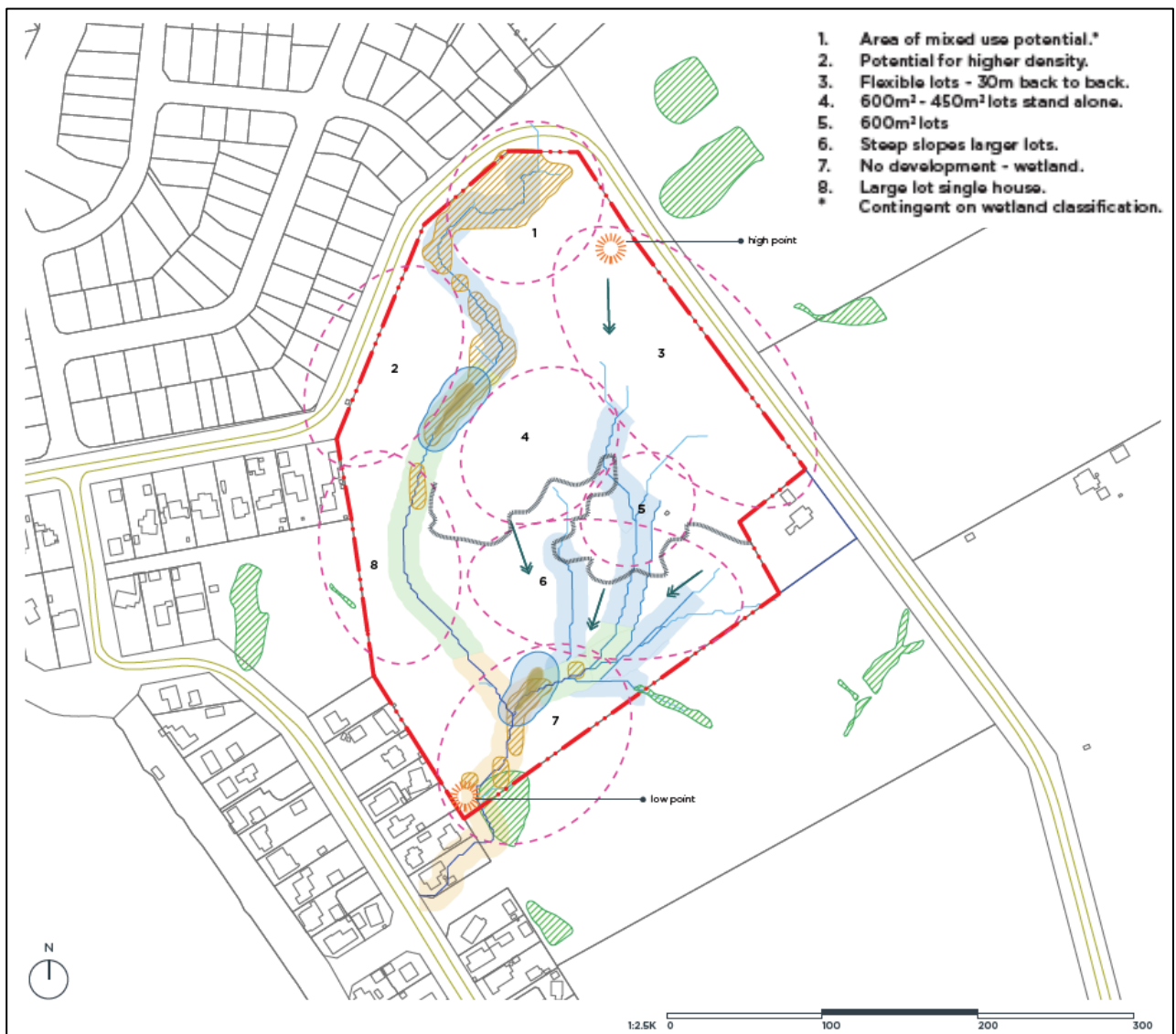
housing allows Maori to live on ancestral lands.
[3] Glenbrook 3. Chapter I Precincts - Special Housing Areas: Auckland Unitary Plan Operative in part.
[4] Harrison Grierson. (December 2020). Development Feasibility Concept Masterplan Options Study.

3 Residential Demand

This section examines the level of residential demand for different housing typologies (especially higher density types) in Glenbrook and surrounds, to determine whether there is sufficient demand for higher density housing, in particular. If viable higher density forms would potentially raise the yield closer to 100 dwellings, making the entire development more commercially feasible and helping sustain additional retail space at the neighbourhood centre.

3.1 Household Growth

There are currently approximately 172,140 households living in South Auckland (defined as the Howick, Manukau, Manurewa-Papakura and Franklin wards). This is a high growth area and it is anticipated that a further 77,250 households will choose to live in this area by 2043. This translates to annual growth of approximately 3,090 households per annum between 2018 to 2043. Much of the household growth is expected in the two most southern wards (Manurewa-Papakura and Franklin wards), as this is where the vast majority of the vacant capacity resides. Only 18% of growth is anticipated in Manukau ward which compares with its current share of households of 26.5% of the South Auckland total. Growth is expected to occur at a fairly even rate across the horizon assessed.

Figure 3.1: Household Growth by Auckland Ward, 2018-2043 (I11 Auckland Council Growth Projections)

Ward	2018	2021	2023	2028	2033	2038	2043	Growth n	%
Howick	47,360	49,420	50,800	54,240	56,410	58,580	61,690	14,330	30%
Manukau	42,900	45,080	46,530	50,160	52,300	54,440	56,690	13,790	32%
Manurewa-Papakura	43,800	46,510	48,320	52,850	55,590	58,340	60,410	16,610	38%
Franklin	27,740	31,130	33,390	39,040	46,820	54,610	60,260	32,520	117%
South Auckland Total	**161,800**	**172,140**	**179,040**	**196,290**	**211,120**	**225,970**	**239,050**	**77,250**	**48%**
Rodney	25,450	28,580	30,680	35,910	45,460	55,020	61,110	35,660	140%
Albany	61,330	67,320	71,320	81,300	88,080	94,850	101,820	40,490	66%
North Shore	53,710	55,830	57,230	60,750	62,810	64,860	67,700	13,990	26%
Waitakere	59,750	62,950	65,090	70,420	75,230	80,040	83,090	23,340	39%
Whau	28,350	29,970	31,060	33,760	35,480	37,200	39,130	10,780	38%
Waitemata and Gulf	42,810	46,440	48,850	54,900	59,020	63,150	67,140	24,330	57%
Albert-Eden-Roskill	55,110	58,110	60,110	65,110	68,210	71,300	74,250	19,140	35%
Orakei	36,840	38,730	39,990	43,130	45,150	47,180	49,150	12,310	33%
Maungakiekie-Tamaki	24,280	26,460	27,920	31,570	33,840	36,120	38,980	14,700	61%
Auckland Region	**549,430**	**586,530**	**611,290**	**673,140**	**724,400**	**775,690**	**821,420**	**271,990**	**50%**

An additional 1,300 households per annum to 2043 are anticipated in Franklin ward. By 2043 it is projected a total of 60,260 households will live in the area, receiving the largest share of growth for South Auckland (it accounts for 42% of all South Auckland growth) and the third largest share of growth for the whole of the Auckland region (Franklin accounts for 12% of total Auckland growth to 2043).

3.1.1   Household Types

Within the coastal north-western area of Franklin Ward (the coastal areas from Karaka to Waiuku), the main household types are couples with no kids (31%), two parent families with up to two children (28%), and single persons (18%).[5] This pattern differs slightly to the overall South Auckland and Auckland Region distribution with a higher proportion of couples in the coastal north-western area of Franklin Ward. This pattern is unlikely to change significantly in the coming years.

A location quotient analysis shows which household types are likely to be more concentrated (LQ > 1) in the coastal north-western area of Franklin Ward and which household types are more sparsely concentrated (LQ < 1) compared to the Auckland region. Couples with no kids are 1.21 times more likely to live in coastal north-western areas of Franklin Ward. These are likely to be retirees with relatively high wealth. In addition, 2 parents with 3 or more children (LQ = 1.20) are more heavily concentrated. As with the Couples and no children, these households are usually older families with more wealth than the norm and are choosing to locate in the high amenity areas on the Manukau Harbour coast. One-person households also have a slightly higher than average concentration (LQ = 1.08), but not as significantly as the other two categories described (Figure 3.2).

Household types less likely to live in these areas are multi-family households (LQ = 0.49) and non-family households (LQ = 0.46). Multi-family households are more heavily concentrated in lower value areas as there is a high correlation with lower household incomes and higher concentration of Pacifica and Maori ethnicities (due to culturally based differences in living arrangements).

Non-family households are usually younger flatting arrangements and will be heavily co-located with urban centres, Universities and other tertiary institutes – not rural coastal settings.

Figure 3.2: Location Quotient for Household types in Coastal North-Western Areas of Franklin Ward compared to Auckland Region

Household Type	LQ
One-Person Household	1.08
Couple Only	1.21
2 Parents with 1 to 2 Chn	0.99
2 Parents with 3+ Chn	1.20
One Parent Families	0.96
Multi-Family Households	0.49
Non-Family Households	0.46

3.2   Residential Pipeline (10-15km radius)

We have assessed the pipeline for residential development within 10-15km of the site (mainly Glenbrook, Waiuku and Patumahoe), using data from Pacifecon Building Intelligence. That data shows that there are 336 residential projects, that are either completed, under construction or in planning (Figure 3.3). The

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[5] Customised dataset taken from the 2013 Census to define household types to 47 different types based on household composition, age and income.

majority (98%) of projects are standalone dwellings, 2% are residential developments or subdivisions and one terraced housing project (Figure 3.4). It is likely that the majority of the commenced projects will become capacity within a year to 18 months.

Figure 3.3: Project Progress of Residential Pipeline

	Completed	Commencing	In Planning	Early Planning
Glenbrook	1	82	1	1
Waiuku	0	183	4	3
Patumahoe	0	58	2	1
Total	**1**	**323**	**7**	**5**

Figure 3.4: Typologies of Residential Pipeline

	Houses	Terraced Houses	Residential Development /Sub-division
Glenbrook	83	0	2
Waiuku	186	1	3
Patumahoe	60	0	1
Total	**329**	**1**	**6**

Some consents may not reach construction stage, but it is clear from the Pacifecon data that the main housing typology currently being developed or planned in a 10-15km radius of the site are standalone houses. This is to be expected given the location is peri-urban to rural in setting, with higher density housing more suited to urban type environments.

3.3   Demand for Higher Density Dwellings

Based on the current typology supply in the area and the residential pipeline, there is likely to be little demand for higher density terraced housing typologies in Glenbrook and the surrounding Franklin locality. These higher density typology types are not in keeping with the current residential typology makeup or the construction pipeline for the area.

However, given the Glenbrook Beach setting is becoming more town like in terms of its settlement pattern, there may be a willingness to trade private space for the opportunity to live in close proximity to the coast. We suggest there is some demand for standalone dwellings on smaller lots (<400m^2) and duplexes. These forms of housing would most likely appeal to couples with no children and single persons. The structure of future demand in the coastal areas from Karaka to Waiuku is very similar to the current household structure. The main household types are couples with no kids (31%), two parent families with up to two children (28%), and single persons (18%). Just under half of the market (couples with no kids and single persons) could be attracted to standalone dwellings on smaller lots and duplex typologies.

We understand the developer would like to investigate whether there is sufficient demand to support the establishment of a <u>retirement village</u> on the site. Currently there are no retirement villages in the wider Glenbrook Beach area and only one rest home (Glenbrook Rest Home). Within the immediate Glenbrook Beach area, only 15% of the resident population are 65 years and over. Older people want to retire in an area they know well, close to household amenities such as health care facilities, a supermarket, cafes, a pharmacy and community facilities. Given that the area is sparsely populated and relatively isolated from good community and health care facilities, we suggest there is minimal demand from older residents to live there.

It will be important to ensure that any high density residential that is developed has high levels of amenity in order to overcome the demand preference for standalone dwellings in this location.

4   Education Demand

This section will determine where the existing schools around Glenbrook are located and the number of children enrolled at them. Future demand for schools for all ages will be analysed and whether additional capacity in schools in needed given dwelling typologies and population projections, with a focus on demand arising from the proposed development.

4.1   Existing School Supply

Between Karaka and Waiuku within Franklin Ward, there is a total of 24 schools for all ages (Figure 4.1). The closest school to the site is Glenbrook Primary School, located 8km south of the site, and the only school in the wider Glenbrook beach settlement area.

Figure 4.1: Existing schools around Glenbrook, Karaka to Waiuku
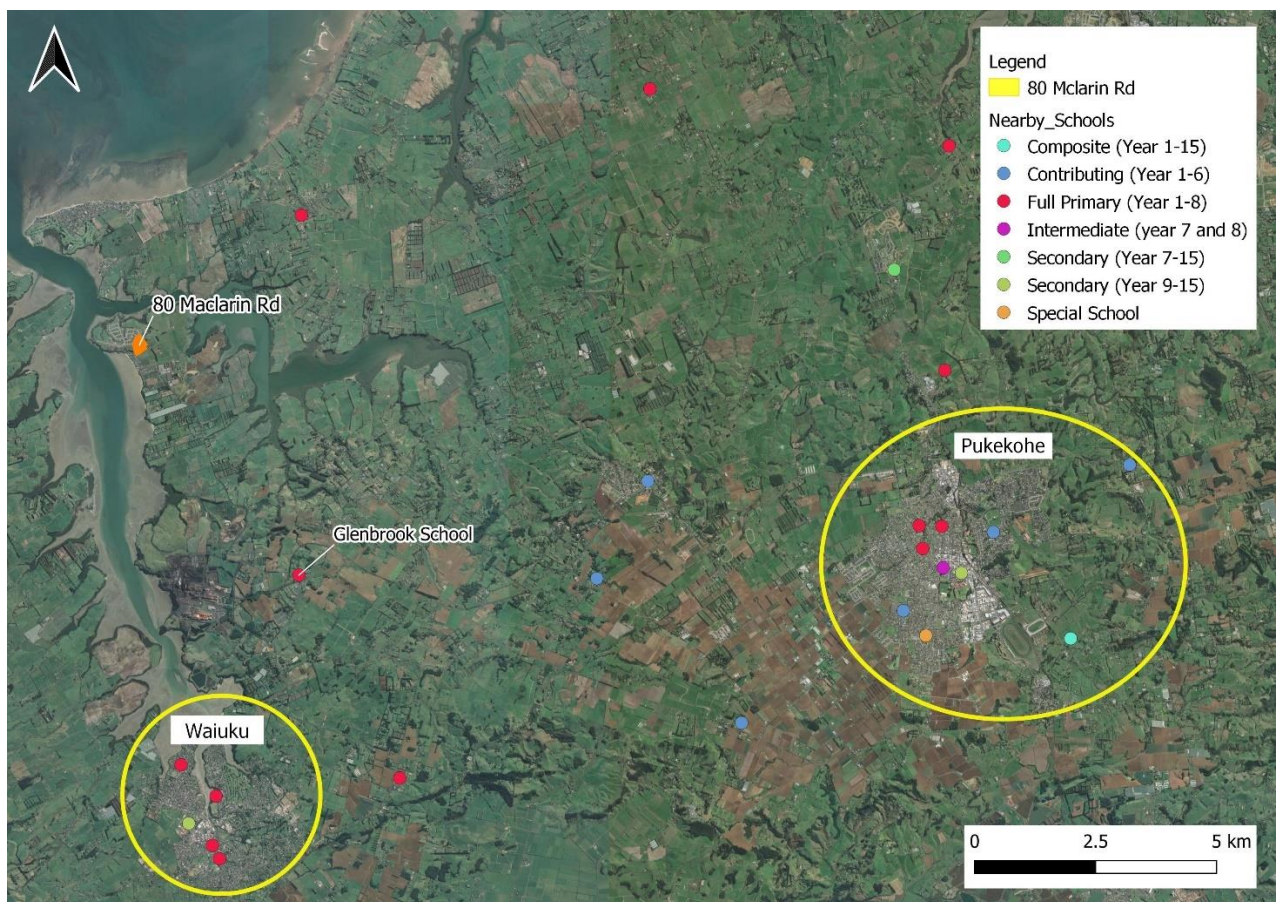
The balance of schools are spread between; Pukekohe (9), Waiuku (4) and other rural locations (9). In total there are eleven full primary schools (years 1-8), six contributing[6] schools, four secondary schools and one each of intermediate, composite[7] and special schools (Figure 4.2). The majority (65%) of schools in the area are between decile 4-7, three schools (13%) are below decile 4 and five schools (22%) have a decile rating greater than 4.

Figure 4.2: Existing Schools around Glenbrook by Type[8]

School Type	Count	Total Roll
Full Primary	10	5,042
Contributing	6	1,260
Intermediate	1	678
Secondary	5	2,250
Composite	1	290
Special School	1	465
Total	24	9,985

Total school roll for all schools around Glenbrook is 9,985 students. There is a greater number of students enrolled in primary schools[9] (6,302) compared to secondary and composite schools (2,540).

Between 2010 and 2020, the total roll for all existing schools in the area increased by 18% (1,517 students) (Figure 4.3). Kingsgate and Mauku School have experienced the largest percentage increases in student roll over the last 10 years, an increase of 221% or +73 students and +94% or +72 students respectively. Pukekohe Hill School (+125), Pukekohe Christian School (+107 or +55%), Glenbrook School (+87 or +43%), Pukekohe Intermediate (+194 or 34%) and Puni School (+57 or +31%) have also seen moderate to high increases in their roll over the last 10 years.

Some schools have experienced a declining roll, these are Pukeoware, Sandspit Road, St Joseph's and Te Hihi. Te Kura Kaupapa Māori (TKKM) o Waiuku has presumable closed its doors, with their roll declining from 10 students in 2010 to 2 students in 2019 and 0 students in 2020.

Overall, there has been growth of 18% (or 1,517 students) in total school rolls for existing schools around Glenbrook (the area from Karaka to Waiuku, including Pukekohe and bounded by Franklin Ward in the South) over the past 10 years. Glenbrook school has shown one of the highest levels of change over the past decade with over 43% growth, the fourth highest growth of all schools covered and second highest once the state integrated religious/private schools are removed.

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[6] Years 1-6

[7] A composite school is one that combines different year levels and often those that cross the 'levels' of education.

[8] Education Counts 2021

[9] Full primary and contributing

Name	2010	2020	2010-2020	
			n	%
Glenbrook School	203	290	87	43%
Karaka School	234	257	23	10%
KingsGate School	33	106	73	221%
Mauku School	77	149	72	94%
Parkside School	119	143	24	20%
Patumahoe Primary School	260	304	44	17%
Pukekohe Christian School	194	301	107	55%
Pukekohe East School	163	169	6	4%
Pukekohe High School	1589	1785	196	12%
Pukekohe Hill School	614	739	125	20%
Pukekohe Intermediate	579	773	194	34%
Pukekohe North School	274	305	31	11%
Pukeoware School	177	152	-25	-14%
Puni School	183	240	57	31%
Sandspit Road School	372	336	-36	-10%
St Joseph's School (Pukekohe)	364	345	-19	-5%
Te Hihi School	220	198	-22	-10%
TKKM o Waiuku	10	0	-10	-100%
Tuakau College	667	678	11	2%
Valley School	428	516	88	21%
View Road School	158	165	7	4%
Waiau Pa School	330	369	39	12%
Waiuku College	825	829	4	0%
Waiuku Primary School	395	465	70	18%
Wesley College	302	371	69	23%
Total	**8,468**	**9,985**	**1,517**	**18%**

4.2   Future Demand for Schools

Future demand for school space generated by the proposed development is based on the type and nature of dwellings being provided in the development and the type and nature of growth in the surrounding area. From the initial concept masterplan options for 80 Mclarin Road[4], four development options have been identified yielding a range of between 55-100 dwellings, based on a combination of standalone and higher density typologies. To reach the upper range of the dwelling yield, a greater proportion of the site will need to be zoned for higher density (Residential-Mixed Housing Suburban) along with smaller lot sizes and two-storey housing typologies.

To provide an estimate of how this translates into additional school student numbers we have;

- Translated the development area into dwelling numbers based on provided yields and assumed a density split for the various options based on initial concept plans for the site.

- Assumed that the standalone dwellings will be populated by the same household types as the balance of the Glenbrook Beach area.

- Applied an assumed age profile to the higher density dwellings based on similar areas in the Auckland Region. We have identified a few areas on the urban fringe of Auckland which have been developed with terraced housing. These areas include parts of Albany Heights, Pine Harbour and Millwater.

Based on age profiles calculated for the existing Glenbrook beach settlement area and similar higher density developments elsewhere on Auckland's urban fringe, the number of children (aged 0-19 years) per dwellings is higher (1.6) for standalone dwellings compared to higher density dwellings (1.3).

4.2.1   Conservative Dwelling Yield Scenario

Based on a more conservative dwelling yield scenario, the proposed Glenbrook development would likely generate around 66-86 children in standalone dwellings and 17-45 children in higher density dwellings (Figure 4.4). This is equivalent to an additional 83 and 132 children in the Glenbrook Beach settlement.

Figure 4.4: Conservative Dwelling Yield and Estimates of Children for the Site

	Option 1	Option 1B	Option 2	Option 2B
Dwellings				
Standalone	41	53	45	54
Higher Density	14	23	30	36
Total	55	75	75	90
No. of Children				
Standalone	66	84	72	86
Higher Density	17	28	38	45
Total	83	112	110	132

4.2.2   High Dwellings Yield Scenario

Based on a high dwelling yield scenario, the proposed development would likely generate around 72-96 children in standalone dwellings and 19-50 children in higher density dwellings (Figure 4.5). This is equivalent to an additional 91 and 146 children in the Glenbrook Beach area.

Figure 4.5: High Dwelling Yield and Estimates of Children for the Site

	Option 1	Option 1B	Option 2	Option 2B
Dwellings				
Standalone	45	56	48	60
Higher Density	15	24	32	40
Total	60	80	80	100
No. of Children				
Standalone	72	90	77	96
Higher Density	19	30	40	50
Total	91	120	117	146

4.2.3   Future School Age Children Profile for the Area

At the 2018 Census there were approximately 75 children ages 0-19 years within the Glenbrook beach area[10]. With the proposed new development, commencing 2024 subject to any consenting delays, there could be an additional 83-146 children living in the area, depending on the typology makeup of the development (the various development options). This is based on the characterises of the existing Glenbrook Beach settlement (standalone dwellings) and similar area age profiles and average children per dwellings for higher density dwellings.

Given the current Glenbrook beach settlement and similar higher density area age profiles, under a conservative dwelling yield scenario, we estimate between 63-98 primary school age children (0-12 years) and between 20-34 secondary school age children (13-19 years). For the high scenario, we estimate between 69-109 primary school age children and between 22-38 secondary school age children.

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[10] SA1 7010297

5   Retail Demand

This section helps to understand the level of retail demand in Glenbrook and which centres households are likely to direct their spend to. The quantity of demand arising from both the proposed development and Kahawai Point (SHA area) as well as the wider Glenbrook area will be estimated along with the amount of floorspace that will be required for retail and other activities by the future population.

5.1   Retail Demand Context

We have defined a catchment for Glenbrook, taking into account the existing centres hierarchy and known future supply nodes. Figure 5.1 below shows the extent of the catchment which encompasses the area from Karaka to Waiuku, extending east almost to State Highway 1 and bounded by the Franklin Ward limit in the south.

Figure 5.1: Retail Catchment and Main Centres
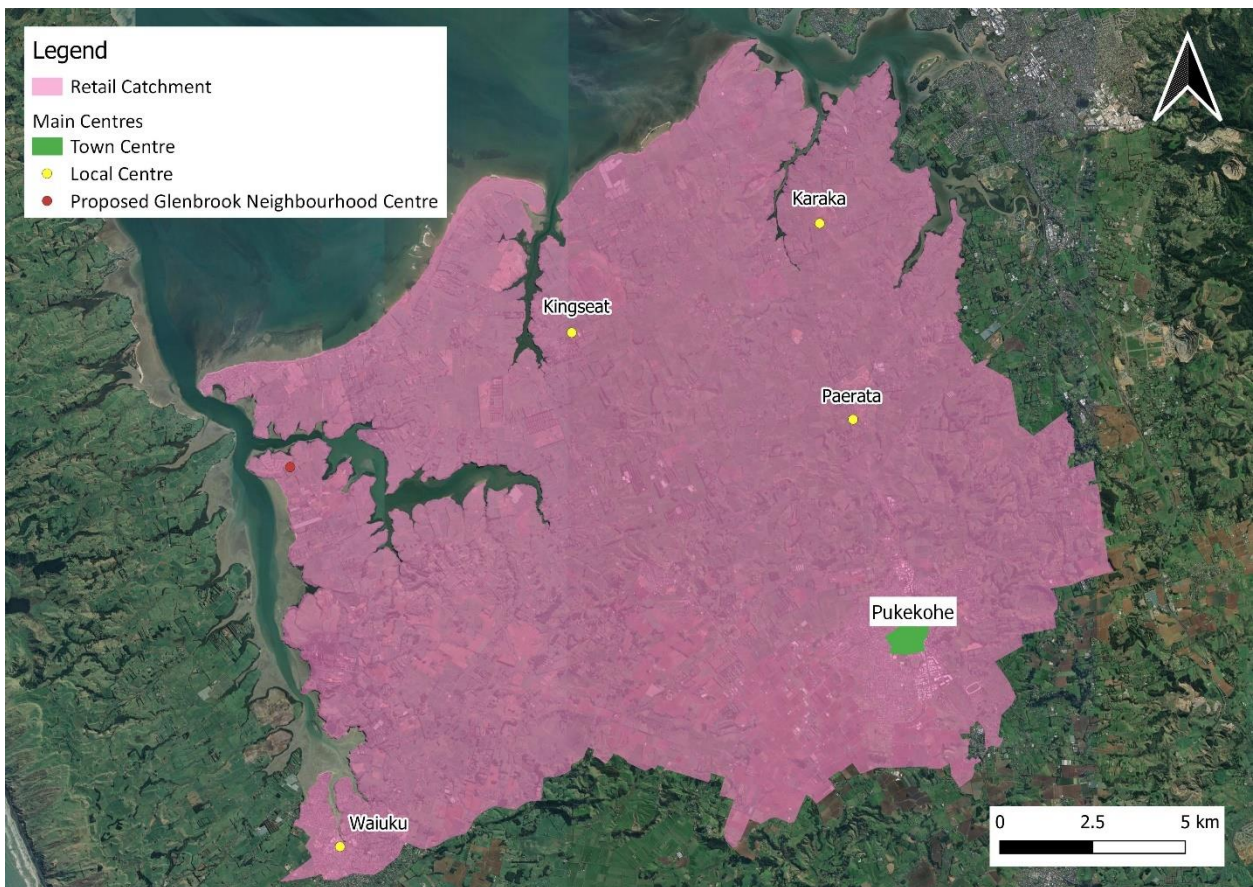
Current households in the catchment are around 17,160 and this this is projected to increase to 32,140 by 2043 (Figure 5.2). In total, the catchment increases by 14,980 households or 87%, an average annual household growth rate of 2.9%.
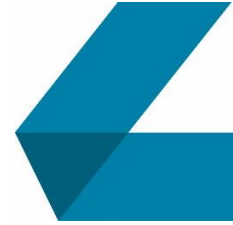
| | 2021 | 2023 | 2028 | 2033 | 2038 | 2043 | Growth 2021-43 | |
							n	%
Households (I11 projections)	17,160	18,170	23,330	26,450	30,460	32,140	14,980	87%

We have used M.E's proprietary Spatial Economy Model 2020 ("SEM") to understand the current size, structure and roles of the centres within the catchment. The main centres in the catchment include Pukekohe town centre and local centres Waiuku, Kingseat, Paerata and Karaka (Figure 5.1). In addition to the proposed Glenbrook neighbourhood centre there are 16 other neighbourhood centres dispersed around the catchment (not shown in Figure 5.1).

The closest local centre is Waiuku, some 14km (15-minute drive) south of the site. Waiuku local centre is anchored by New World Waiuku and large format retail store Mitre 10. In total around 990 people are employed within the centre, 37% of those employed work in some type of supermarket or grocery stores. Other shops in the local centre include cafes, takeaways, restaurants, a pharmacy, Work and Income, NZ Post, ASB bank and various household wares.

Approximately 25km (25-minute drive) east of the site is Pukekohe town centre. Pukekohe town centre is located in the heart of Pukekohe and supports around 3,670 jobs, approximately three to four times more employment than Waiuku local centre. Within Pukekohe town centre there is Pukekohe Plaza shopping centre anchored by Farmers department store, a Countdown, Reduced to Clear, BP, Franklins plumbing supply store and McDonalds. Other smaller stores include cafes, takeaways, restaurants, a pharmacy, Work and Income, NZ Post, bank branches, Labtests, professional offices and various other stores.

In addition, there are sub centres and specialist large format retail centres within Pukekohe township for large bulky purchases that happen irregularly. Pukekohe is effectively the sub-regional centre for the southern most part of Auckland and fulfils many of the metropolitan centre functions of the larger centres within Urban Auckland.

We would expect a sizable proportion of total catchment retail spend by households would be directed to Waiuku and Pukekohe.

In terms of future development, on the eastern edge of the retail catchment is the Drury Future Land. This is earmarked for a new Metropolitan Centre and a new local Centre on the western side of SH1 along with a number of neighbourhood centres. The Drury Metropolitan Centre hearings are currently underway and while Auckland Council are appearing in opposition to the current proposal, most experts agree on both sides that a Metropolitan centre is required on the site immediately east of the Drury SH1 interchange.

Drury Metropolitan Centre will capture a portion of demand that arises out of Glenbrook as it comes on line (possibly from 2028 – 2043) as it is likely to offer a wider and deeper range of retail experiences than Pukekohe does.

5.2   Total Retail Demand

Current retail demand from the 17,160 households and other consumers[11] living in the defined retail catchment is estimated to be around $527m, or $30,700 per household. That $527m is projected to increase to nearly $1,164m by 2043, influenced by the additional capacity of new public and private residential developments, equivalent to growth of $637m (121%) from 2021 (Figure 5.3).

Figure 5.3: Total Retail Spending by catchment households

	2021	2023	2028	2033	2038	2043	Growth 2021-43	
							n	%
Supermarkets and groceries	$ 179.3	$ 192.0	$ 256.2	$ 302.7	$ 362.9	$ 400.0	$ 220.7	123%
Other food retail	$ 30.6	$ 32.8	$ 43.6	$ 51.4	$ 61.6	$ 68.0	$ 37.4	122%
Department stores, furniture, electrical	$ 104.6	$ 112.1	$ 149.7	$ 177.0	$ 212.4	$ 234.7	$ 130.1	124%
Apparel and recreation	$ 121.3	$ 129.8	$ 172.8	$ 203.7	$ 244.0	$ 269.0	$ 147.7	122%
Hospitality	$ 90.9	$ 96.6	$ 127.0	$ 148.1	$ 175.7	$ 192.2	$ 101.3	111%
Total	$ 526.7	$ 563.3	$ 749.3	$ 883.0	$1,056.7	$1,163.9	$ 637.2	121%

Although retail and hospitality demand is significant for the catchment, a large proportion of that will not flow to Glenbrook and instead will be directed to existing large higher order centres.

That retail demand requires retail floorspace to support businesses which make sales to consumers. At average retail productivities, the catchment demand supports around 84,400m^2 of retail floorspace in Auckland, with the largest amounts in supermarkets, department stores and hospitality businesses. That quantum of space is projected to increase to nearly 185,900m^2 by 2043, an increase of 101,500m^2 (Figure 5.4).

Figure 5.4: Retail and Hospitality GFA Supported in all Locations by Catchment Consumers

	2021	2023	2028	2033	2038	2043	Growth 2021-43	
							n	%
Supermarkets and groceries	17,400	18,600	24,800	29,300	35,200	38,800	21,400	123%
Other food retail	4,000	4,300	5,700	6,800	8,100	8,900	4,900	123%
Department stores, furniture, electrical	23,000	24,700	32,900	38,900	46,700	51,600	28,600	124%
Apparel and recreation	18,200	19,500	26,000	30,700	36,700	40,500	22,300	123%
Hospitality	21,800	23,200	30,400	35,500	42,100	46,100	24,300	111%
Total	84,400	90,300	119,900	141,200	168,800	185,900	101,500	120%

5.3   Glenbrook Retail Demand

While Glenbrook is part of the wider retail catchment (described above), we have assumed that none of the surrounding demand will flow to Glenbrook, given its status as a small neighbourhood centre. In reality there will be occasions when people from the surrounding area will travel to Glenbrook and spend in the retail centre, however that does not form a base for this assessment. The proposed neighbourhood centre will capture immediate demand from the proposed new development, Kahawai Point (SHA area) and the wider Glenbrook Beach settlement. Glenbrook neighbourhood centre will serve the daily convince needs

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[11] All demand data in this section includes demand from households, businesses, workers and tourists based in the area

of residents while existing larger higher order centres, at Waiuku and Pukekohe, will meet the majority of households retail and service needs.

5.3.1   Centre Floorspace for Proposed Glenbrook Neighbourhood Centre

Using regional averages of sustainable floorspace (GFA per household) by retail type for neighbourhood centres, the wider Glenbrook Beach settlement (in total) would currently sustain around 370m^2 of core retail and hospitality space in the proposed Glenbrook neighbourhood centre (Figure 5.5). That space would increase to 547m^2 by 2033 and 656m^2 by 2043, an increase of 287m^2 (+78%) over the 22-year period. Current zoned commercial land is approximately 4,215m^2 (0.4215ha).

As well as core retail and hospitality space in the proposed Glenbrook neighbourhood centre, there is demand for other retail, including Household Services (hairdresser, laundromat), Professional Services (real estate), Automotive and Out of Centre. Currently this demand is around 209m^2 of GFA, increasing to 309m^2 by 2033 and 371m^2 by 2043.

Figure 5.5: Retail Demand GFA sqm from Wider Glenbrook Beach Settlement

	2021	2023	2028	2033	2038	2043	Growth 2021-43	
							n	%
Food & Liquor	145	157	191	214	240	257	112	78%
Comparison Retail	96	104	127	143	160	171	75	78%
Hospitality	129	139	170	190	213	228	100	78%
Core Retail and Hospitality	370	400	488	547	612	656	287	78%

Of the demand from the wider Glenbrook Beach settlement, the immediate households near the neighbourhood centre (the proposed development, Kahawai Point SHA area and the existing Glenbrook beach residential area) will largely support the retail offerings within the neighbourhood centre. Based on average GFA by retail type per household, the proposed development (55-100 Dwellings) would demand 13-23m^2 of total core retail and hospitality space in the proposed Glenbrook neighbourhood centre while Kahawai Point development (c. 800 dwellings) will demand around 184m^2 (Figure 5.6).

Other retail demand GFA supported by these immediate households in the proposed neighbourhood centre is around 7-13m^2 from the proposed development and 104m^2 by Kahawai Point.

Figure 5.6: Retail Demand GFA sqm from Development Site and SHA within the Wider Glenbrook Beach Settlement

	Food & Liquor	Comparison Retail	Hospitality	Core Retail and Hospitality
Proposed Development 55 Dwellings (low)	5.0	3.3	4.4	12.7
100 Dwellings (high)	9.0	6.0	8.0	23.0
Kahawai Point (SHA area) 800 Dwellings	72.0	48.0	64.0	184.0

For this particular site we would recommend a staging approach to the development of commercial land. Expansion of the centre should occur overtime relative to household growth which will ensure retail offerings are supported by local spending.

5.3.2   Timing of floorspace

Given that 2024 is the earliest development commencement timing for the site and a good portion of Kahawai Point development stage one homes are still under construction, the timing and staging of commercial floorspace in Glenbrook should grow in line with the development. It is important to ensure that sufficient land is zoned for the Neighbourhood Centre at its full 2048 size, today. It then becomes a commercial decision as to when that land is developed. The developer will make decisions based on the resident population at the time – and potential future growth needed to support retail at the proposed centre.

6   Conclusion

Auckland Council I11 growth projections indicate an additional 1,300 households per annum to 2043 in Franklin ward. It is projected by 2043 a total of 60,260 households will live in the area, receiving the largest share of growth for South Auckland and the third largest share of growth for the whole of the Auckland region.

Demand for Higher Density Typologies

This report has examined the market for higher density housing formats within the western areas of Franklin Ward (Karaka to Waiuku). Our assessment has shown that there is very minimal demand for attached dwellings in the area, with few high density builds recently constructed as well as few in the residential pipeline. There are a range of factors that will make Glenbrook a desirable residential location, but development should be in keeping with the current scale and typologies in the area as well as the residential pipeline. It will be important to ensure that any high density residential that is developed has high levels of amenity in order to overcome the demand preference for standalone dwellings in this location.

Glenbrook has good access to local employment areas (Waiuku and Pukekohe), and a range of schools for all ages in the vicinity. The area will likely attract couples, two parent families with up to two children and single persons. Glenbrook is sufficiently removed from Auckland City with a coastal aspect which will appeal to some buyers over other locations in the South Auckland market.

Demand for Schools

Glenbrook primary school is the only school within the wider Glenbrook Beach settlement. Over the last 20 years, the school roll has increased by 43%, the fourth highest growth of all schools covered and second highest once the state integrated religious/private schools are removed. Looking at the future population projections for the area and that Glenbrook is becoming more town like in terms of its settlement pattern, Glenbrook primary school is likely to need to accommodate up to 109 additional students. Depending on the space per student ratios that currently exist in the school, it may be necessary to ensure additional space is provided.

Glenbrook Neighbourhood Centre's Future Retail and Services Role.

Additional housing in Glenbrook, including the proposed development that is subject to this Private Plan Change, means the future resident population will need a small commercial area to service their daily convenience retail and commercial service needs. Neighbourhood centres provide residents and passers-by with daily convenience retail and commercial service needs. Neighbourhood centres can apply to a single corner store or small block of shops located in residential neighbourhoods, typically consisting of a mixture of dairies, takeaways, hairdresser, laundromats and bottle shops.

Given the future resident population in Glenbrook, around 370m^2 of core retail and hospitality GFA will currently (2021) be supported in the proposed Glenbrook neighbourhood centre and this will increase as the more households move into the area. A proposed Glenbrook neighbourhood centre should plan to accommodate approximately 656sqm GFA of core retail and hospitality stores. This might consist of:

- A dairy or general store.

- Either a café and/or takeaway store.

- In addition, around 10% of the centre's commercial floorspace could be devoted to household service activities such as a hair and beauty salon, laundromat, or real estate agency.

These should be staged according to household growth in the area.