

Executive Summary:

- The nature of ownership within the centre is fragmented and predominantly that of private investors and family trusts. Many of these investors have adopted passive investment strategies and this has contributed to the current micro-economic environment, whereby an aversion to vacancy has rated above proper profiling of the asset and its suitability for particular tenant types.

This has resulted in a somewhat conservative approach to growth of the assets and a continuation of existing uses, despite their apparent poor performance

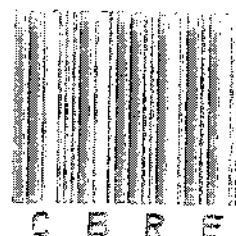
- Rentals throughout the mainstreet offer some of Waitakere City's most affordable retail and office accommodation options.

In general terms, rentals north of the Harbourview Road and Taikata Road intersection, generally fall within a range of between \$1,200 - \$1,500 per month. Towards the central mainstreet, higher rentals predominate, although the quality of accommodation is somewhat mixed affecting the variance of the rental range.

Our discussions with local occupiers has revealed that many acknowledge the role that Te Atatu Peninsula plays is of a secondary centre and therefore quality and rental price are not major considerations.

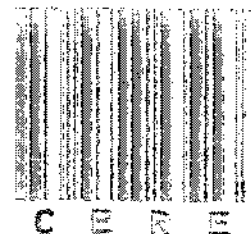
- There is a disproportionate concentration of convenience and takeaway food outlets coupled with discount variety stores. The establishment of these uses would tend to indicate an economic environment driven by rental affordability, rather than strategic location within the centre.

The centre's requirement for change is therefore prompted by the necessity to accommodate the local population's needs, re-identify the centre's role and economic function and provide a sustainable basis for growth and intensification.



- We believe there are a range of activities that are not represented or would be suitable within the town centre, however specific identification of these activities is a somewhat irrelevant exercise as market forces will dictate their occupation. We believe that the centre's role is firmly that of providing convenience services and retail opportunities.

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- Boutique retailing, such as fashion, electronics and furniture would appear to offer limited appeal to the catchment, as more extensive ranges are readily available within the nearby regional centres of Henderson and Westgate.

Rather, it is our opinion that specialised food retailing (fresh meat, fish and poultry retailing) and pharmaceutical and other store-based retailing (stationary, used goods and flower retailing) provides a more suitable base, coupled with a range of health and professional services.

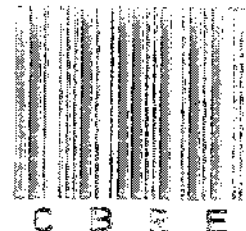
- Our investigations, in conjunction with Waitakere City Council's consultation with local stakeholders, confirms that a number of proprietors are intending to undertake redevelopment of their properties, typically by way of low to medium rise apartment complexes, with ground floor commercial frontages.

As these owners have not participated in active management of their assets, this has resulted in a somewhat circular scenario, whereby rental returns are not sufficient to feasibly develop new stock, without developing higher yielding residential units in conjunction with commercial components.

- Te Atatu Peninsula is currently experiencing a change in demographic, with two age ranges in particular experiencing a significant uplift during the period between 2001 and 2006. Specifically, those residents aged 35 – 49 years and over 65 years of age have grown in representation.

Waitakere City Council have questioned whether the changing demographic will affect local spend and development 'on the ground'.

Our brief investigation of markets affected by aging populations reveals that historically, developments have had limited regard to the particular age characteristics of the surrounding population. More so the rationale for new development is based upon attracting tenants seeking quality accommodation, able to pay premium



rentals over and above required rates of return. These include high turnover or high margin business and those which have a national presence.

- There would appear to be limited demand for office accommodation within Te Atatu Peninsula, largely as a result of locational barriers (transportation, labour supply pool) in addition to such requirements being satisfied elsewhere.

Given the nature of the location upon a Peninsula and the lack of uses that would attract co-location of office activities, we would envisage continued soft levels of office attraction, other than professional, bank and real estate services.

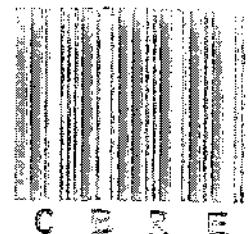
- We have completed a trigger point analysis whereby retail and office redevelopment could proceed on a feasible basis.

Whilst we acknowledge that there are a number of subjective factors which would affect required rental rates, we are able to confirm that in general, ground floor retail rates would need to breach \$300 psm and office accommodation achieve rental rates of at least \$230 psm, excluding GST and outgoings.

These rates exceed those found elsewhere within Waitakere City and therefore, modern redevelopment is unlikely to proceed in the short term unless it is underpinned by higher yielding development. Although rental rates in excess of this threshold have been achieved within the Bella Vista development, we do not believe there is sufficient depth within the market at present to attract these rental rates and occupier types.

Recommended interventions and measures that we believe warrant further investigation include:

- The existing tenant composition of the centre is weighted towards convenience foods and discount variety stores, attracted to the centre by low to moderate rental levels. This has resulted in a tempering of rental growth by comparison to other established town centres throughout

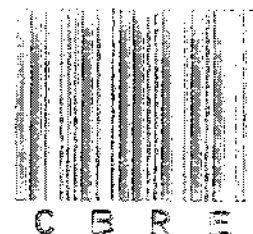


Waitakere City and accordingly the centre has attracted a secondary profile.

We believe that a contraction, rather than expansion, of the retail core may be required in order to provide equilibrium to the nature of uses and rentals able to be paid. With increased scarcity of space, there is a greater likelihood of 'higher and better' being attracted.

Although the addition of new bulk to the centre, may equally provide accommodation suitable for more highly regarded, nationally branded tenants, we believe that this may result in further piecemeal style development and as a consequence, exacerbating those areas which continue to perform poorly.

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- The style of recent (and proposed) development within the centre has been somewhat opportunistic, being clustered around sites which were previously vacant or presented few complexities with regard to their relationship with adjoining residential development.

In order to optimise the layout and configuration of the existing centre's roading and pedestrian network, we would advocate clustering of uses and promotion of development types within various quadrants.

For example, we have identified that commercial office facilities should be fostered within the north-western quadrant of Te Atatu Peninsula, where low-moderate retail rental rates predominate and development effects can be more effectively mitigated.

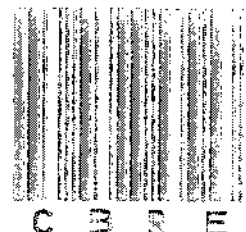
In addition, Council should actively support residential focussed development upon 'landmark' and 'gateway' corner sites within the centre, which benefit from uninterrupted views towards the Upper Waitemata Harbour and/or benefit from a close association with public amenities (Community Centre, Village Green, Jack Pringle Park).

These initiatives will potentially enhance the function of the town centre, by consolidating retail focus towards the core and creating an 'amphitheatre' of development around larger parcels such as the Community Centre and Woolworths sites.

- Other than general market movements in apartment values and retail rentals, car parking requirements would appear to impose the greatest barrier to redevelopment within the centre.

It is our recommendation that Council develop a clear and definitive policy with regard to onsite car parking within Te Atatu Peninsula and investigate other interventions relating to car parking as noted below.

- It has previously been identified that the centre is well served by public car parking, comprising a mix of public kerbside car parks, those located within council owned facilities and larger lots of a private nature.

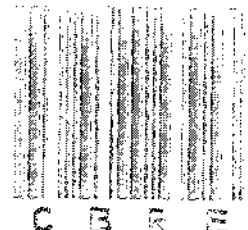


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We have an opinion to the contrary, as kerbside car parking along the mainstreet has contributed to congestion as the Peninsula's population has grown; council facilities are segregated from the retail core and private car park lots offer no secure future car parking benefits.

Rather we believe that a comprehensive public car parking / transportation area should be provided, to promote extended customer stays within the centre and a reinforced focus towards the western mainstreet frontage. Furthermore, such a designated area would provide for future retail expansion opportunities to its periphery and promote the potential for dual / split retail frontages upon the existing mainstreet properties given their extended lot depth.

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Te Atatu Town Centre Concept

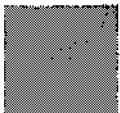
Design Concept Report

Prepared for Waitakere City Council

2 June 2008

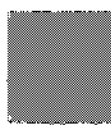


Chow-Hill



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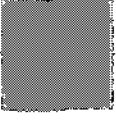
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part 1: background



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background

In the 1990's, Waitakere City's investment in the town centre upgrade & joint development of Harbour View was a catalyst for further private investment.

However, council & the community have recognised that Te Atatu Peninsula needs to plan for the future. A series of community workshops in 2007, followed by technical work, has laid the basis for preliminary concept planning for the peninsula, focussed around the core town centre.

With a current (2006) population of 11,688 people, the Peninsula is expected to absorb a further 2,500 people by 2021. Waitakere's Growth Strategy also anticipates a corresponding increase in commercial activity, with a further 1,000 jobs on the Peninsula (a 200% increase from present).

To accommodate this growth in people & jobs, development on the Peninsula will need to intensify. Over the last 5 years, the majority of population growth has occurred in the new developments on the eastern side of the town centre, in particular Harbour View.

Much of the recent new development has been high quality medium or higher density, demonstrating the market interest in such product. Community acceptance of new forms of living has been encouraged by the high standard of design, both internal amenity & public spaces, delivered by comprehensive development. The town centre has benefited from more residents living within walking distance.

Harbour View was an early demonstration of comprehensive development taking into account sustainable urban design principles. Higher density living was concentrated closer to the town centre or overlooking

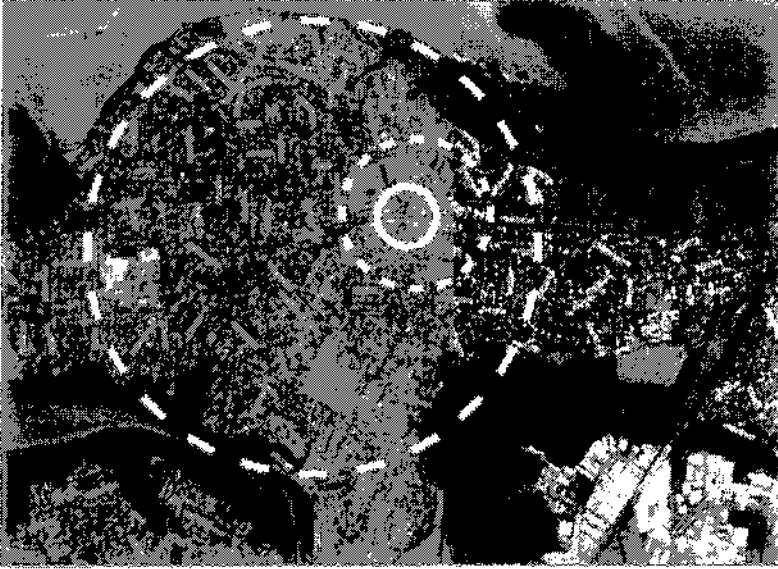
the high amenity of parks or coastal edge. A connected network of open spaces, & streets designed to calm vehicle traffic, provided direct & safe walking routes to town & local facilities. Design standards for new housing ensured that streets were overlooked by balconies & windows, & streets were not dominated by high walls or garage doors.

Later development of apartments & mixed use retail & residential complexes at the edge of Harbour View have continued to demonstrate these principles. Concept plans for the remainder of the town centre must encourage pedestrian-friendly streets & continue to provide opportunity for viable commercial development.

Within the town centre itself, there are two major sites ready for investment, the council's library & community centre, & the Waitakere Licensing Trust's facilities. Both sites are in critical locations to contribute to the town centre, providing an opportunity to rationalise circulation around the east of the centre, & provide a strong edge to Jack Pringle Park, linking the town centre to the harbour's edge.

Planning for the Peninsula must also demonstrate areas appropriate for future redevelopment as market demands grow & pressures to redevelop existing areas increase. As demonstrated at Harbour View, higher intensity housing works best when it is around higher amenity (such as parks or views) or within walking distance of the urban amenities of town.

te atatu peninsula design brief



In response to the expected growth in Te Atatu South, this document acts as a guidance tool for the proper design & development of the following areas;

peninsula structure plan

- managing growth + change
- future opportunities

town centre development concept

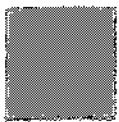
- managing growth + change
- commercial & retail locations
- opportunities for residential intensification
- connections
- public spaces

town centre core

- upgraded library + community centre
- redevelopment of licensing trust land
- linking green networks
- pedestrian safety + amenity

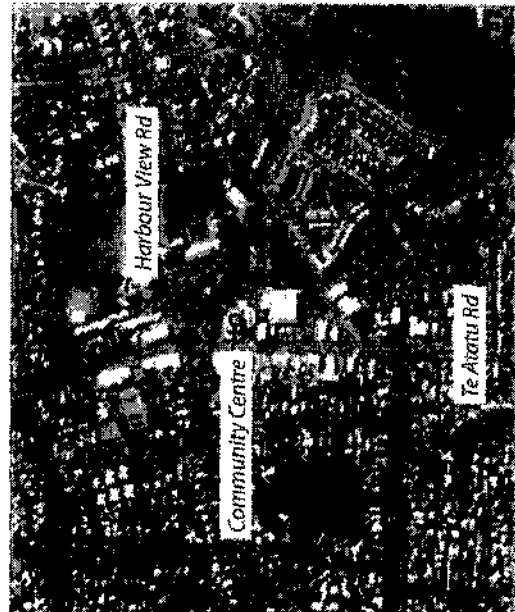
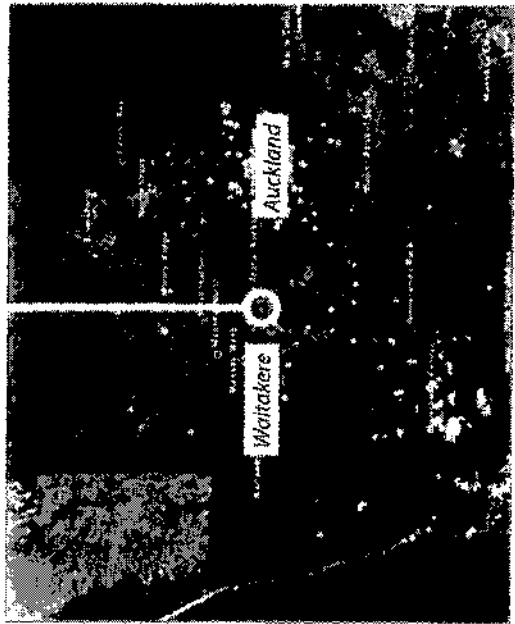
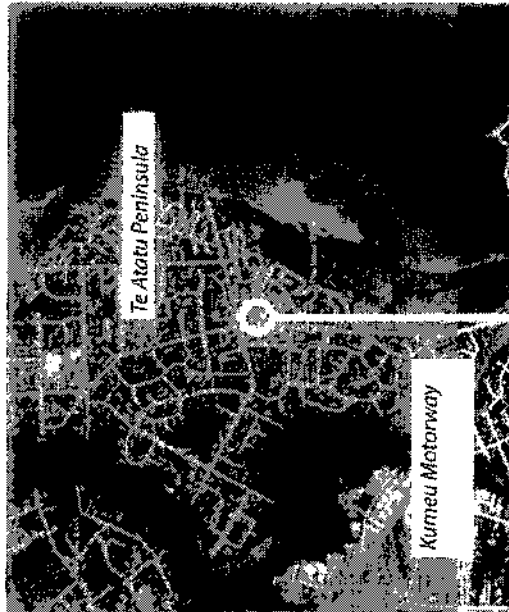
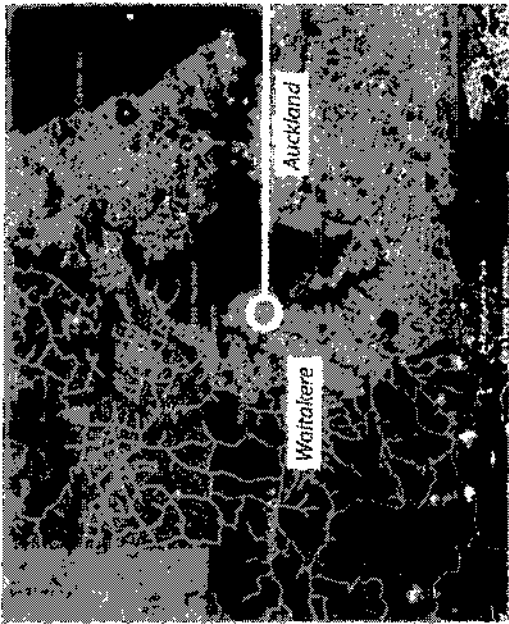
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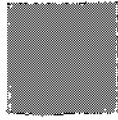
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location

background **A13**





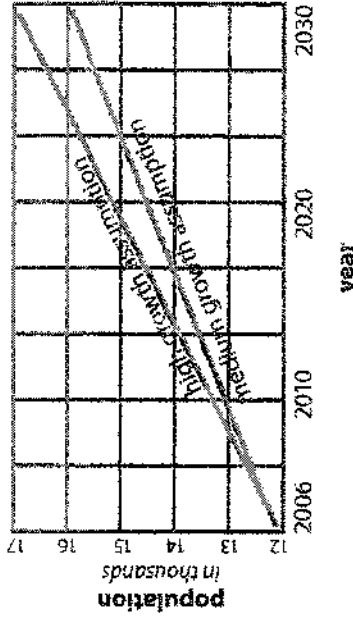
growth

background

The Waitakere City Growth Strategy aims to place growth along commercial, retail & transportation nodal points, such as the Te Atatu town centre. Living within a walking distance to retail, services & places of employment means residents are less reliant on cars, therefore more sustainable. Passenger transport also relies on people being able to walk safely, so concentrating living and working close to bus or rail routes also reduces the need to drive.

Te Atatu South is growing in population. In the five years prior to the 2006 census report, Te Atatu's population grew by 14%. The population is expected to increase in size of nearly 16,000 residents by 2030. Assuming the current average household size will remain constant, an additional 1,500 homes will be required over the next two decades.

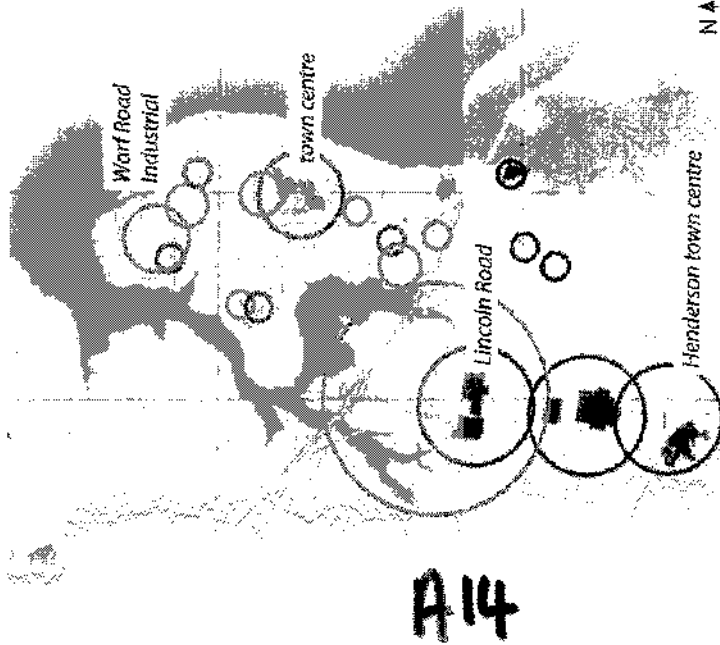
Currently the Peninsula provides jobs for 1,380 people, amounting to a less than 12 jobs per 100 persons. Although the total employment in the centre has grown 19% since 1997, predominantly in the retail sector, it will need to grow much more if Te Atatu hopes to become a sustainable city.



Te Atatu Peninsula Projected Resident Population 2006-2031
 Durham Green, Te Atatu Central & Matipo Census Area Units
 (Source: Waitakere City Council: 2001 Statistics NZ CAU projections
 rebased to 2006 Statistics NZ Territorial Authority projections)

2006	Te Atatu Central	Durham Green	Matipo	Total
dwellings	1578	1413	1044	4053
residents	4461	4404	2823	11688
Average household size	2.83	3.12	2.70	2.88

Te Atatu Resident Population 2006
 (Source: New Zealand Census, Population, 2006)



commercial & working centres

part II: issues + current state



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mix + intensity	14-17
movement + circulation	18-21
public space	22-23
community	24-25

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issues + current state



the town centre

issues + current state **A16**



the town centre

issues + current state

town centre points of intervention

- managing growth + change
- commercial & retail locations
- opportunities for residential intensification
- connections
- public spaces

issues to address

- mix + intensity of uses
- movement + circulation
- community + public space

the town centre

- neighbourhoods within 5-minutes (400 metres) walk from central business district
- community "heart" - Te Atatu Rd mainstreet + community facilities
- green network links
- central roundabout
- 'gateway' into the town centre



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mix + intensity of uses

issues + current state

A18



existing shops on the western side of the community centre



existing medium rise apartments



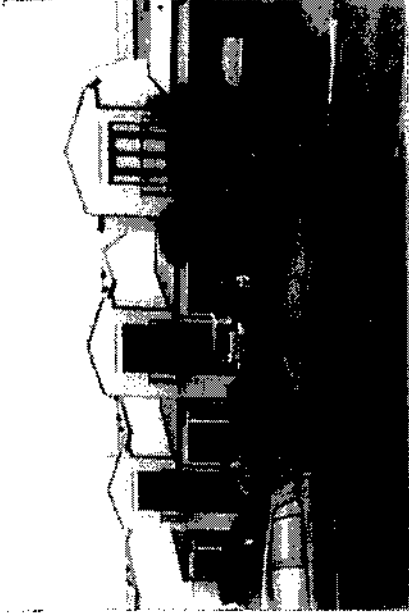
existing mainstreet corridor



existing single level shops



existing low density residential



existing Harbour View medium to low density



mix + intensity of uses

issues + current state

Existing conditions:

- low scale development, mostly single-storey independent retail & commercial buildings with small foot prints
- surface parking for most retail areas
- older residential areas are of low density,
- Harbour View more intensive with a mix of housing types

- Bella Vista apartments sets example of higher density near town centre
- Gunner Drive attracting newer, car-based retail
- business uses extending into residential area north of town centre
- small clusters of convenience shops & cafes outside of the town centre
- rear of shops have poor security & lack of overlooking / supervision
- surplus of takeaways & bakeries
- no clear definition of the start or end of the town centre

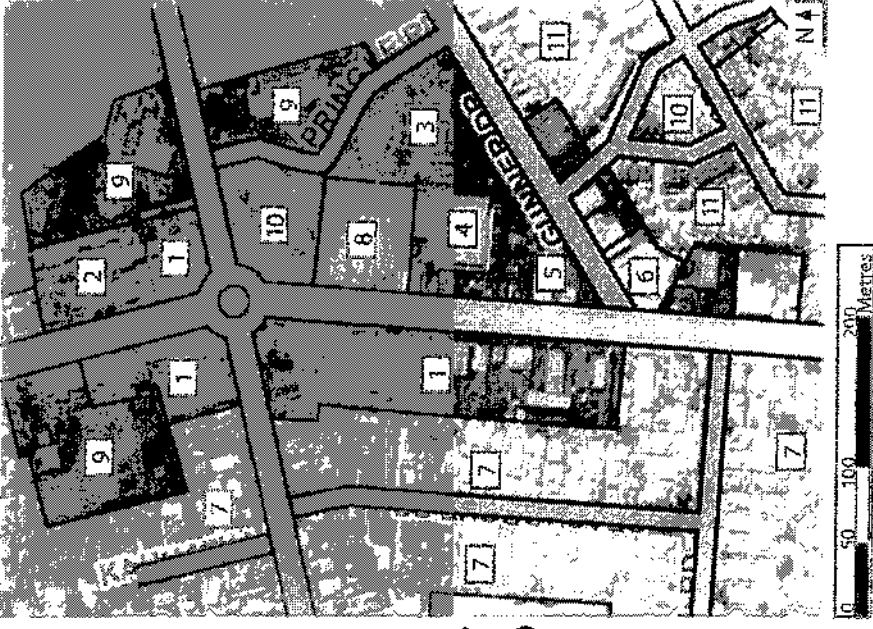
Constraints:

- single level retail is sufficient for current retail needs
- supermarket important retail anchor - future use driven by owner's regional strategy
- on site parking is required by district plan
- water supply is limited in design to serve existing low levels of intensity
- limited access to west side shops restricts development opportunity
- Te Atatu Rd is a heavy haul route to service Warf Road industrial area.

- 1 single storey retail
- 2 commercial uses extending into residential
- 3 tavern/bottle shop
- 4 stand-alone supermarket
- 5 petrol station
- 6 service retail ground floor, apartments above
- 7 low density residential
- 8 community centre
- 9 community use
- 10 open space
- 11 Harbour View residential

design brief

- realise potential for redevelopment on existing commercial sites
- identify opportunities for more intensive residential in immediate area to achieve density within a pedestrian catchment of town centre
- identify opportunities for residential above retail where single storey retail currently exists
- consider potential uses north of Harbour View Rd






existing uses

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Intensity of uses

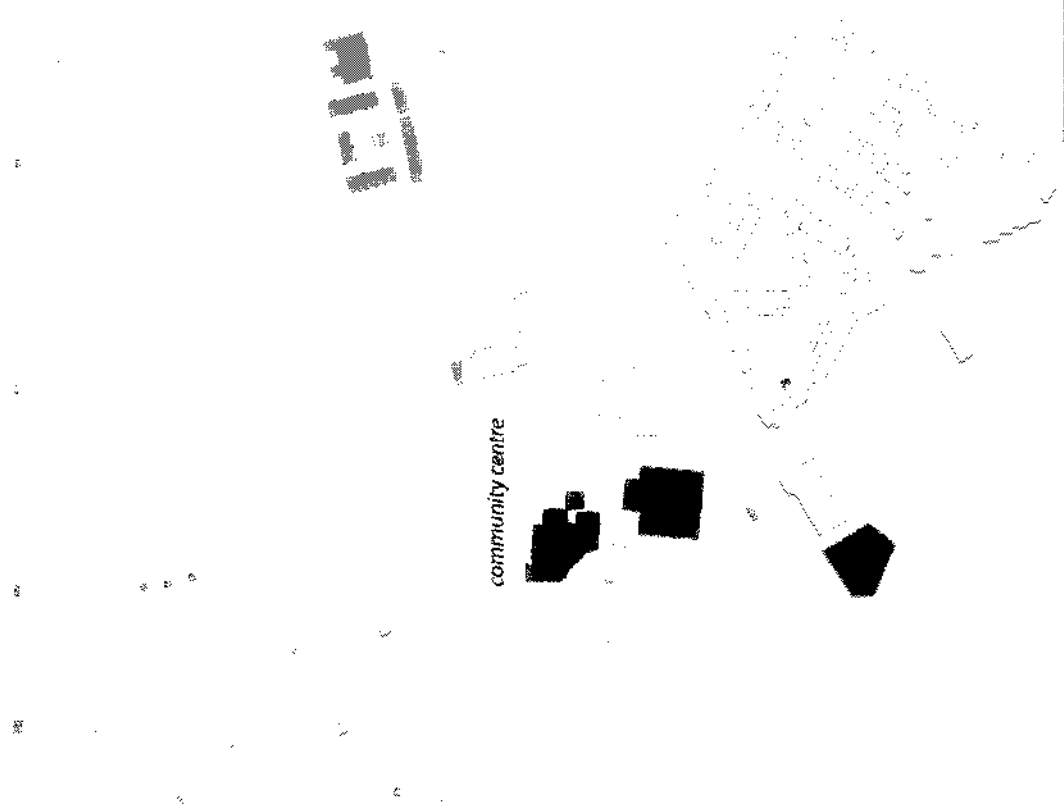
built form

-  1 level structure
-  1-2 levels
-  2 or more levels

The diagram to the right demonstrates the foot prints of existing building, together with their height. As the Waitakere Growth Strategy aims to achieve, the built form is to be the most intense inside the town centre.

existing conditions

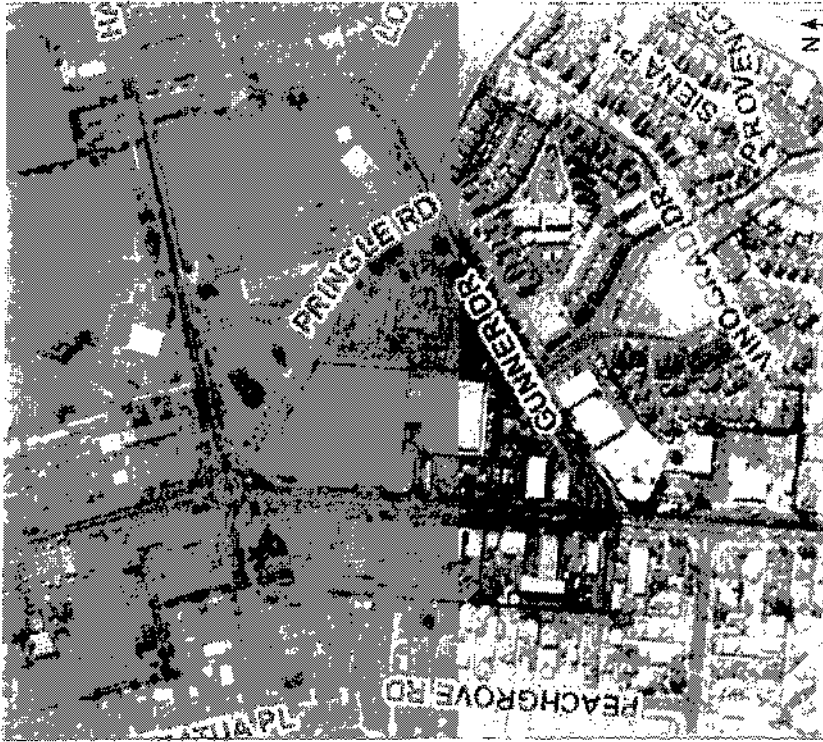
- low scale
- large open areas
- shared + public spaces that are not well-defined & feel uncomfortable to the people using them



issues + current state

A20

mix of uses - current district plan



- community environments
- Harbour View special
- living environments
- reserve

issues + current state

community environment

- "town centre" zone
- allows retail, commercial & residential uses
- no maximum height, but development is limited by adjacent residential height to boundary controls
- design criteria control outcomes, especially relating to interface with street
- development is required to meet prescribed parking requirements

living environment

- residential zone now included in Plan Change 16 - medium density housing around growth nodes (subject to appeal)
- no plans currently for affordable housing on the Peninsula
- allows more intensive housing, such as apartments, terraces or town homes, subject to careful urban design, amenity & other design criteria

Harbour View zones

- Harbour View North special zone - higher density apartments with noise attenuation requirements to reduce sensitivity to surrounding uses
- Harbour View living - medium density housing

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District Plan Provisions in Te Atatu Peninsula Town Centre










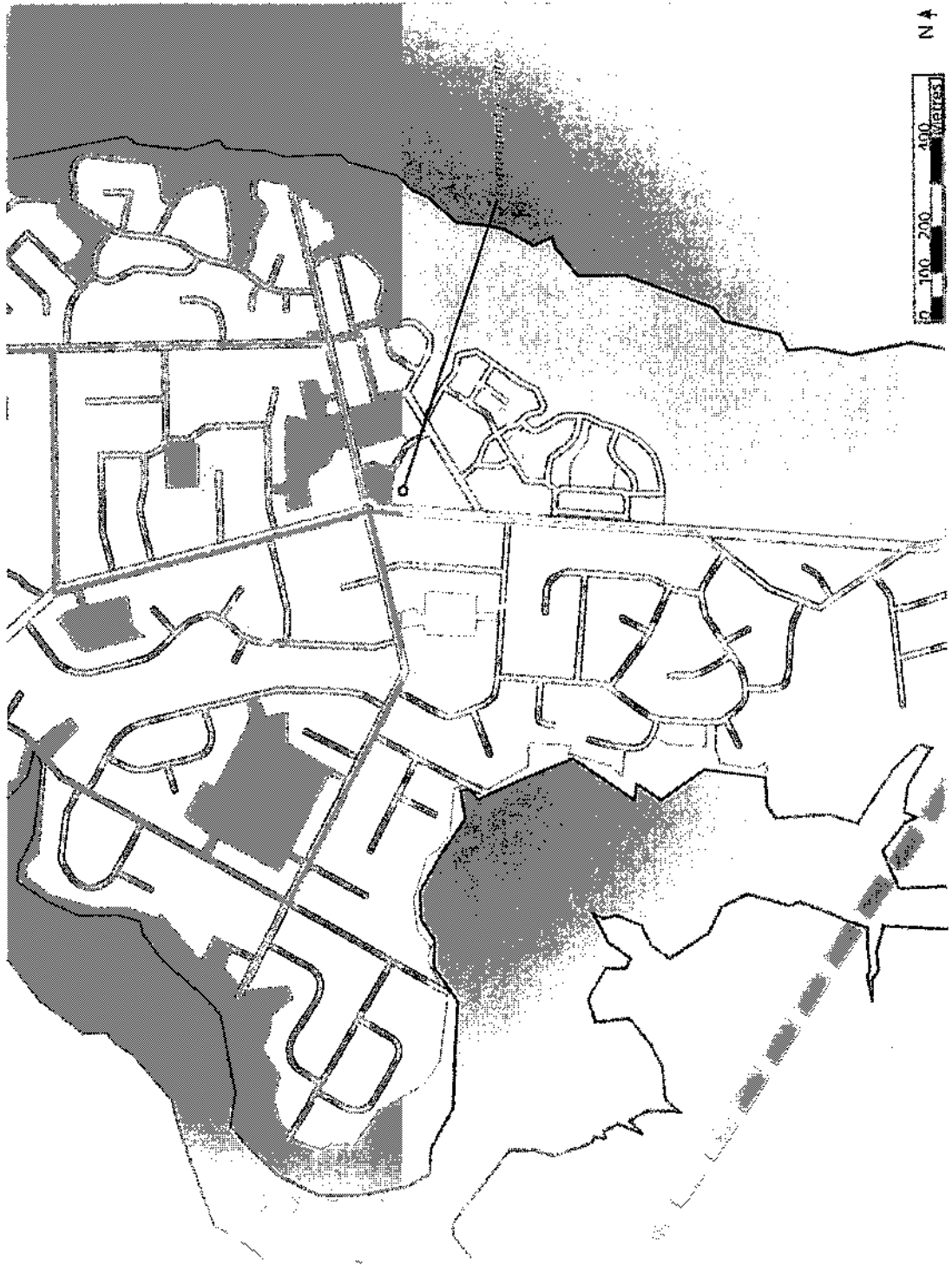
movement + circulation

issues + current state

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circulation & open space

-  street
-  district road
-  motorway
-  heavy haul route
-  400 metre ped shed
-  Maxx bus route 049
-  reserve

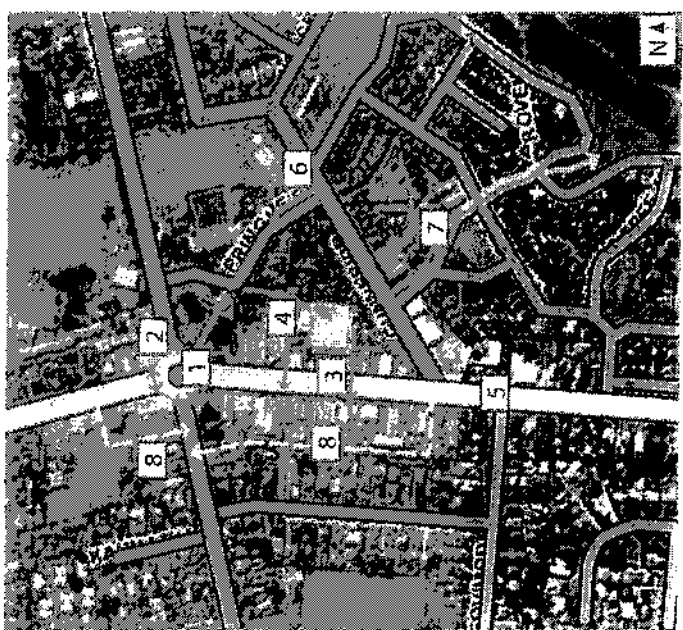


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movement + circulation

issues + current state



- 1 roundabout
- 2 pedestrian crossing inhibited at roundabout
- 3 Te Atatu Rd pedestrian crossing
- 4 mid block pedestrian links
- 5 gateway / Gunner Dr
- 6 pedestrian link to gun emplacements
- 7 pedestrian link to green network
- 8 incomplete servicing circulation

Existing conditions:

- Te Atatu Road still perceived as barrier for pedestrians
- informal desire lines used as crossing points
- proposed Plan Change 18 suggests allowing medium density housing within a 500 metre circle of the Harbour View Rd & Te Atatu Rd intersection.
- roundabout is a major barrier, separating northern retail from main part of town centre
- footpath conditions need improvement, footpaths often blocked with signage
- informal pedestrian links well used but low amenity & safety (supermarket carpark & library walkway)
- Traffic calming not in budget, recorded crash rates are not high
- City bound bus stop obscures library entrance
- surface parking more than currently required under District Plan
- incomplete servicing & circulation in rear of shops along Te Atatu Rd

Constraints:

- no formal bike lanes on Te Atatu Road
- bus lane on Te Atatu Road

design brief:

- improve connections between north & south shops
- improve pedestrian links across mainstreet & to green network
- reduce block sizes to create more connected network east & west of mainstreet

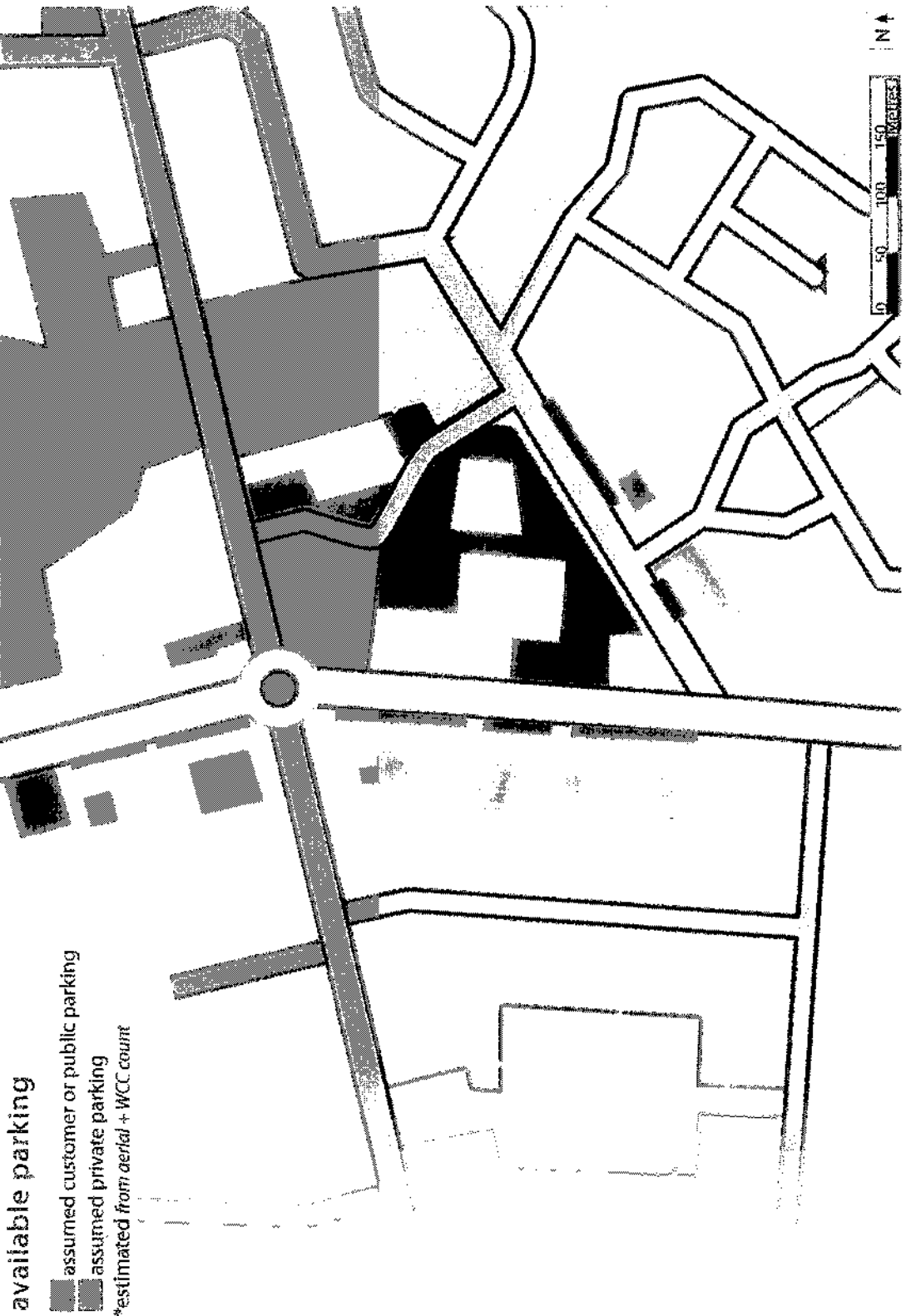
A23



movement + circulation

issues + current state

A24



movement + circulation



angled on street parking



existing car park



existing car park



non paved parking

issues + current state

parking

Existing conditions:

- ample parking is available in the Te Atatu Town Centre at an estimated 550 parking spaces
- the oversupply of parking is inhibiting intensification
- the community would like parking to have better security & supervision

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