

ROTORUA
FUTURE DEVELOPMENT STRATEGY
Technical Advisory Group

24 NOVEMBER 2022



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FOR TOMORROW



AGENDA

1. Further refined scenarios & capacity
2. MCA of business sites
3. Underutilised urban land analysis
4. TAG feedback received
5. Questions and next steps



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SPATIAL SCENARIOS

BASE SCENARIOS

- Ngongataha Growth Node
- Multi-Nodal Intensification
- SH36 Growth Corridor
- Eastside Growth Focus

REFINED SCENARIOS

- Base Case A (Plan Change 9 only)
- Base Case B (Plan Change 9 & 2018 Spatial Plan Greenfield)
- Multi-Nodal Intensification A (with Ngongotaha Greenfield)
- Multi-Notal Intensification B (Rationalised intensification)



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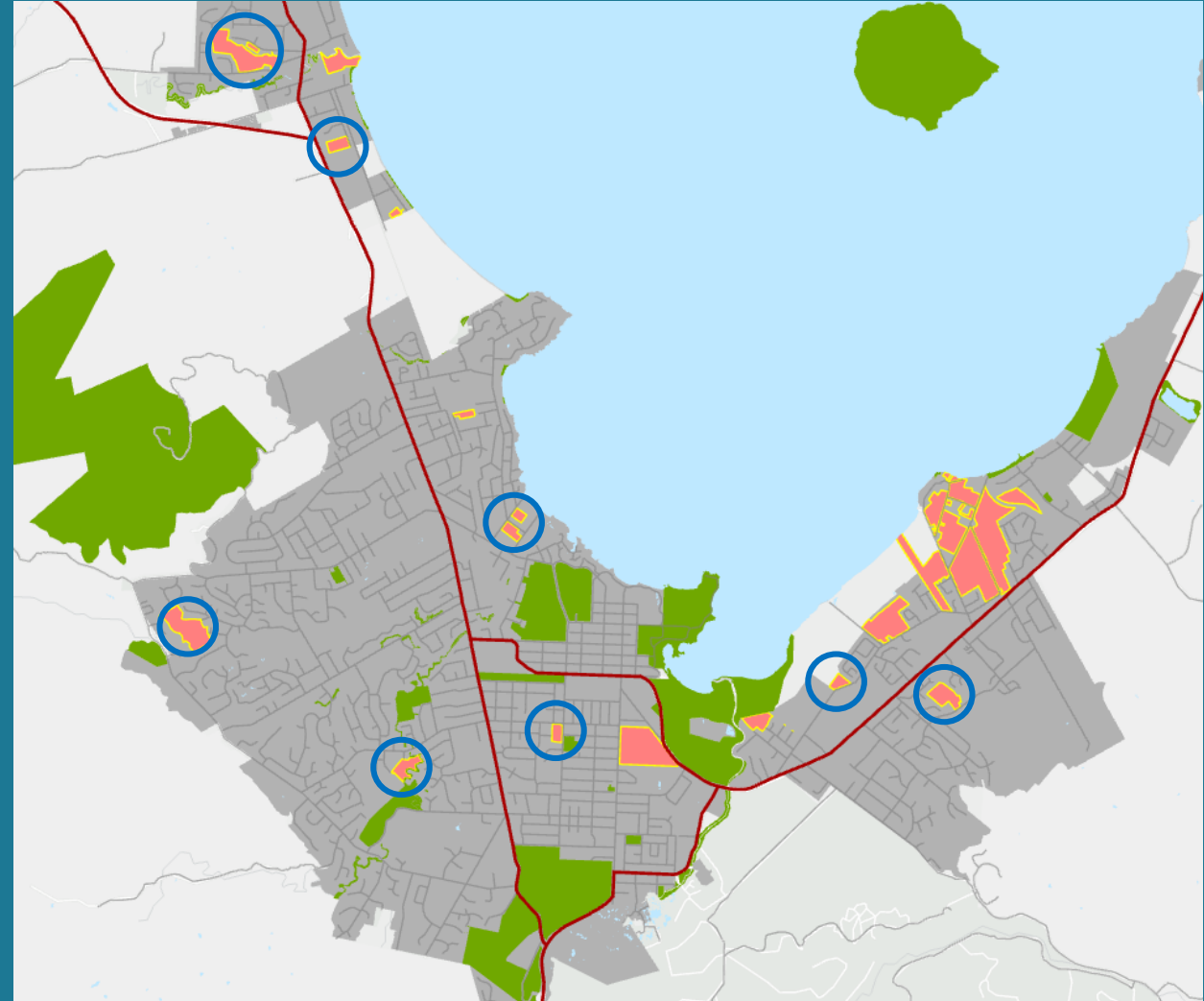
ASSUMPTIONS

- Greenfield capacity numbers are based on an average density of 300m² per dwelling of the net development area (70% of site). Assumes Greenfield will incorporate a combination of attached and detached typologies enabled via PC9 Res 1 provisions.
- Uptake of commercially feasible intensification opportunities is uniform across Rotorua (i.e. uptake in Western Heights is the same as Glenholme North).
- Uptake of commercially feasible intensification reduces with increased greenfield capacity provided within scenarios. This varies between 10-25%.
- Alternative capacity scenario from HBA for Maori Freehold Land applied.
- Assumed infrastructure required to enable greenfield growth is feasible.



LAND ANALYSIS

- Large parcels of land within the urban area.
- Accounted for in the capacity analysis (ca. 1,900 potential dwellings).
- Further analysis undertaken following TAG feedback to test feasibility on the ground.
- Considered land ownership and site constraints.
- Several sites (blue circle) currently being progressed for development (potential for ca. 900 dwellings - half of which are in Ngongotaha).



1. BASE CASE A (PC9)

- No new greenfield. Intensification as per proposed PC9 provisions.
- Long-term capacity of 9,700 dwellings. In line HBA projections.
- Key assumptions:
 - Pukehangi and Wharenuī built out based on current masterplans (750 & 1000 dwellings)
 - Development on Māori owned land (not otherwise planned) occurs over longer timeframe
 - 25% of commercially feasible brownfield sites are redeveloped over the next 30-years (ca. 6,900 dwellings).
- Relies on levels of intensification above projected demand (5,600 dwellings)
- Notable growth areas:
 - Ngongotaha (500); City Centre (1,100); Glenholme (360); Owhata/ Lynmore (700); Springfield (500); Mangakakahi (500).



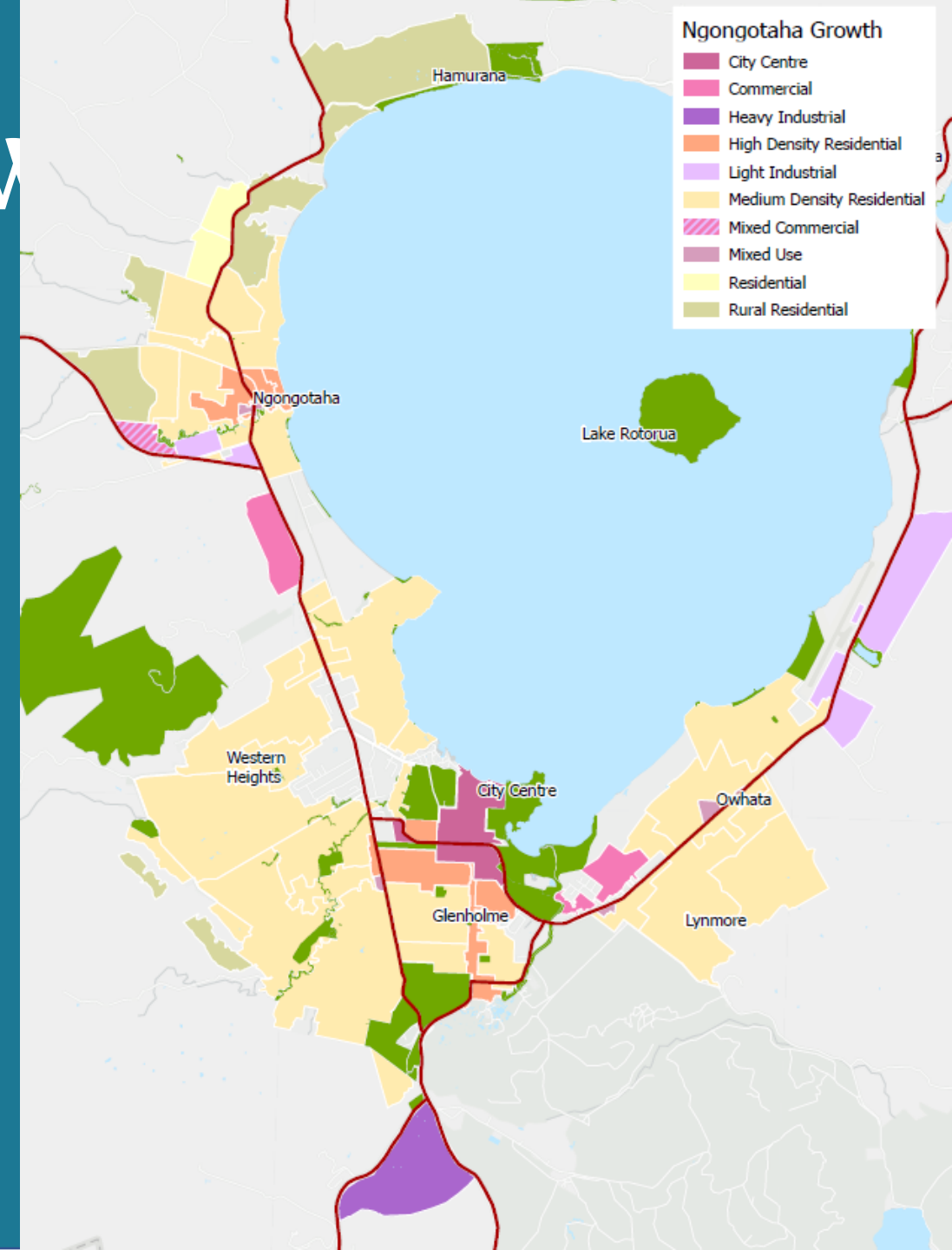
2. BASE CASE B (PC9+S)

- Intensification as per proposed PC9 provisions. Greenfield in line with 2018 Spatial Plan.
- Long-term capacity of 12,500 dwellings. 2,800 above HBA projections.
- Key assumptions:
 - Potential for 6,500 greenfield dwellings (assumes no infrastructure constraints).
 - Development on Māori owned land occurs over longer timeframe.
 - 17.5% of commercially feasible brownfield sites are redeveloped over the next 30-years.
- Levels of intensification in line with projected demand (5,000 vs 5,600)
- Notable greenfield growth areas:
 - Ngongotaha (2,800); Owhata Lakefront (1,500).



3. NGONGOTAHA GROWTH

- Intensification as per proposed PC9 provisions. Greenfield/ higher densities around Ngongotaha.
- Long-term capacity of 12,400 dwellings. 2,700 above HBA projections.
- Key assumptions:
 - Potential for 6,200 greenfield dwellings (assumes no infrastructure constraints).
 - Development on Māori owned land occurs over longer timeframe.
 - 17.5% of commercially feasible brownfield sites are redeveloped over the next 30-years.
- Levels of intensification in line with projected demand (5,300 vs 5,600).
- Notable growth areas:
 - Ngongotaha greenfield (4,000); Ngongotaha intensification (810)



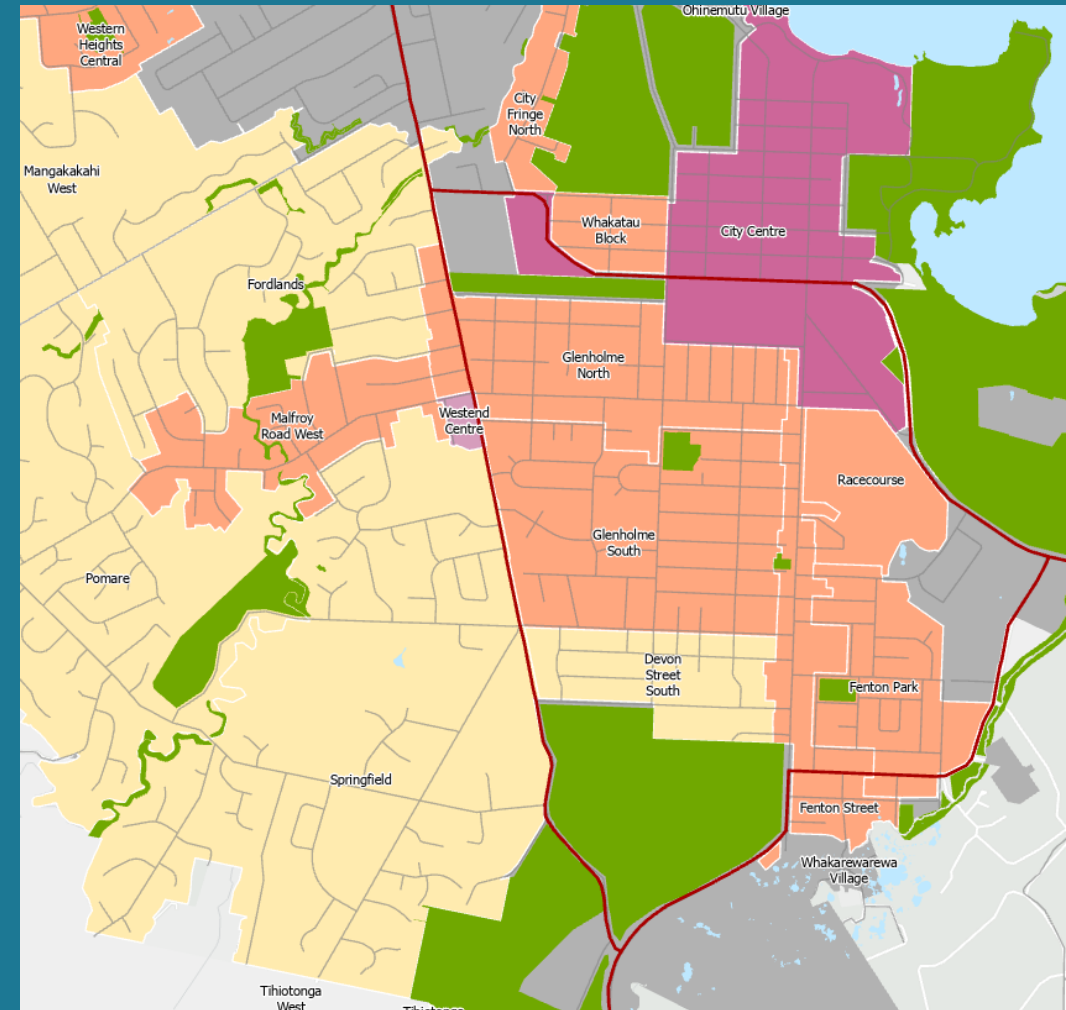
4. MULTI-NODAL

- No new greenfield. Increased densities above PC9 around key nodes.
- Long-term capacity of 10,800 dwellings. 1,100 above HBA projections.
- Key assumptions:
 - Pukehangi and Wharenuī built out based on current masterplans (750 & 1000 dwellings)
 - Development on Māori owned land occurs over longer timeframe.
 - 25% of commercially feasible brownfield sites are redeveloped over the next 30-years.
- Levels of intensification 40% above projected demand (7,800 vs 5,600)
- Notable growth areas:
 - City Centre (1,100); Glenholme (900); Western Heights (800), Lynmore (550); Westend (200); Owhata (600)



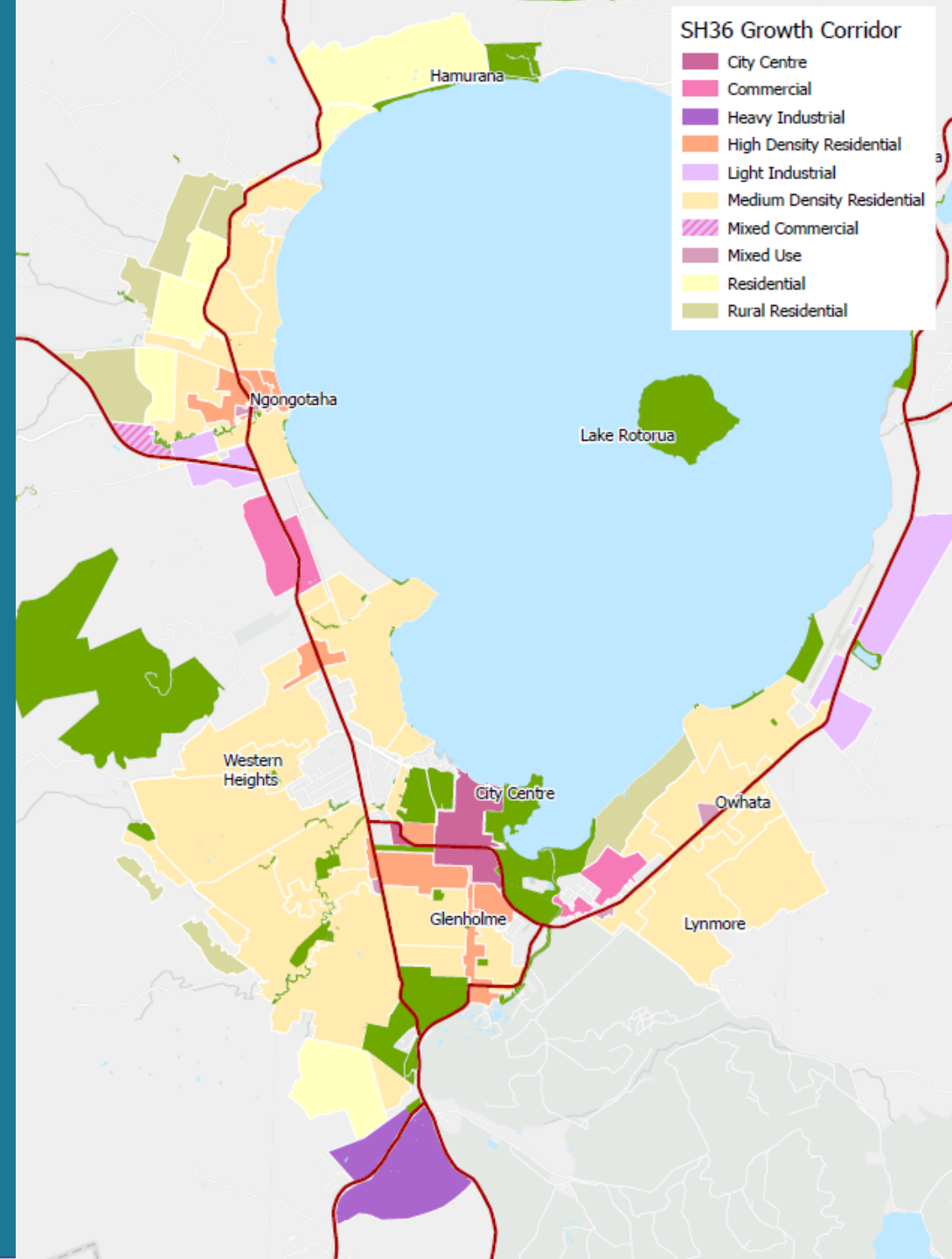
MULTI-NODAL (KO PC9 SUB)

- Multi-nodal scenario tests capacity for an expanded High Density Residential around the City Centre.
- Key difference with KO submission is:
 - No HDRZ in Devon St South Area
 - HDRZ applied to Fenton Park & Malfroy Road West areas.
- Good proxy for capacity potential of KO submission.
- Capacity estimates (assuming 25% uptake/realisation of commercially feasible dwellings):
 - PC9 – 740 dwellings
 - Multi-nodal – 920 dwellings



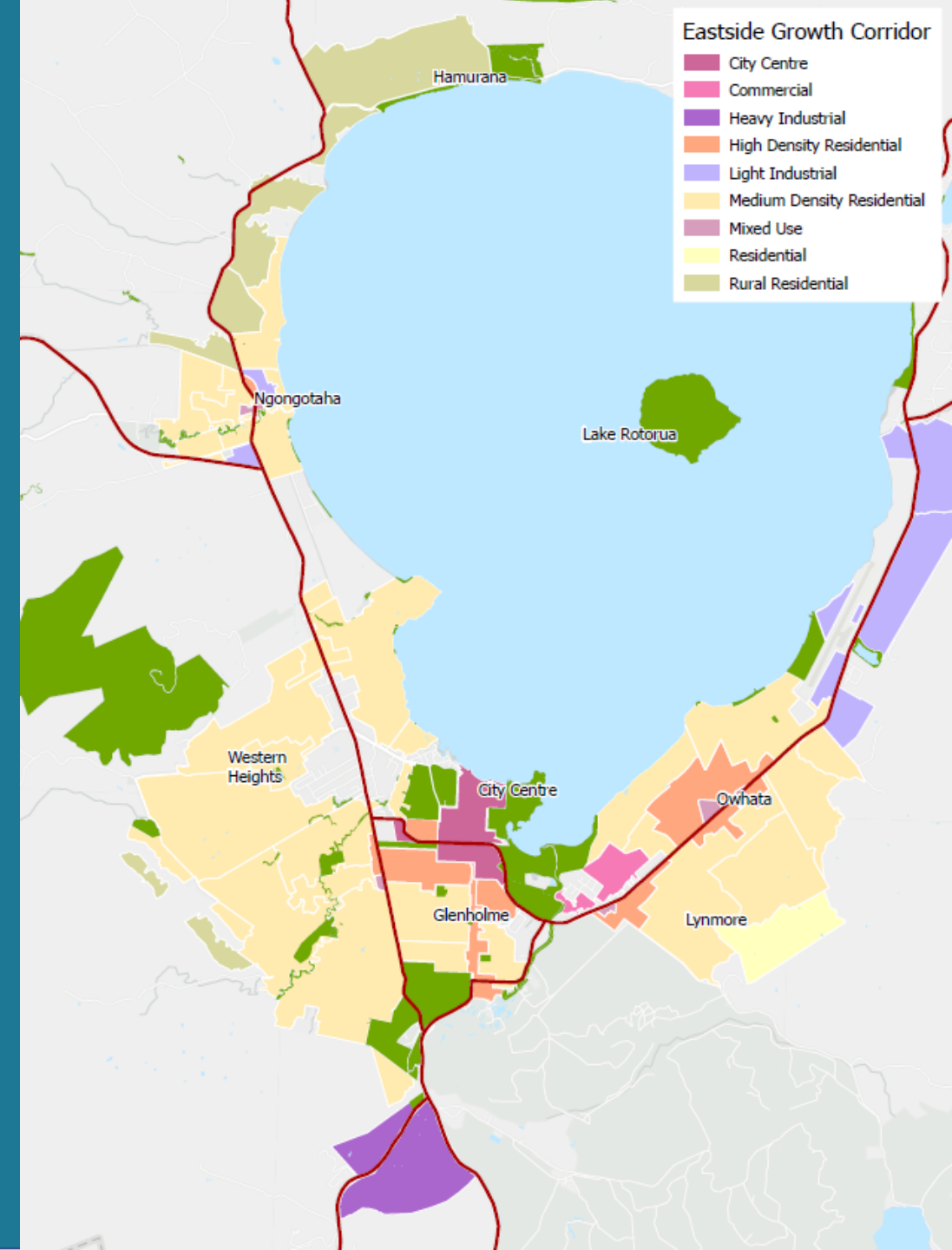
5. SH36

- Intensification as per proposed PC9 provisions. Greenfield/ higher densities between Ngongotaha & Hamurana.
- Long-term capacity of 14,500 dwellings. 4,800 above HBA projections.
- Key assumptions:
 - Potential for 10,500 greenfield dwellings (assumes no infrastructure constraints)
 - 10% of commercially feasible brownfield sites are redeveloped over the next 30-years.
- Levels of intensification 45% below projected demand (3,000 vs 5,600)
- Notable growth areas:
 - Hamurana (5,000); Aquarius Drive (660).



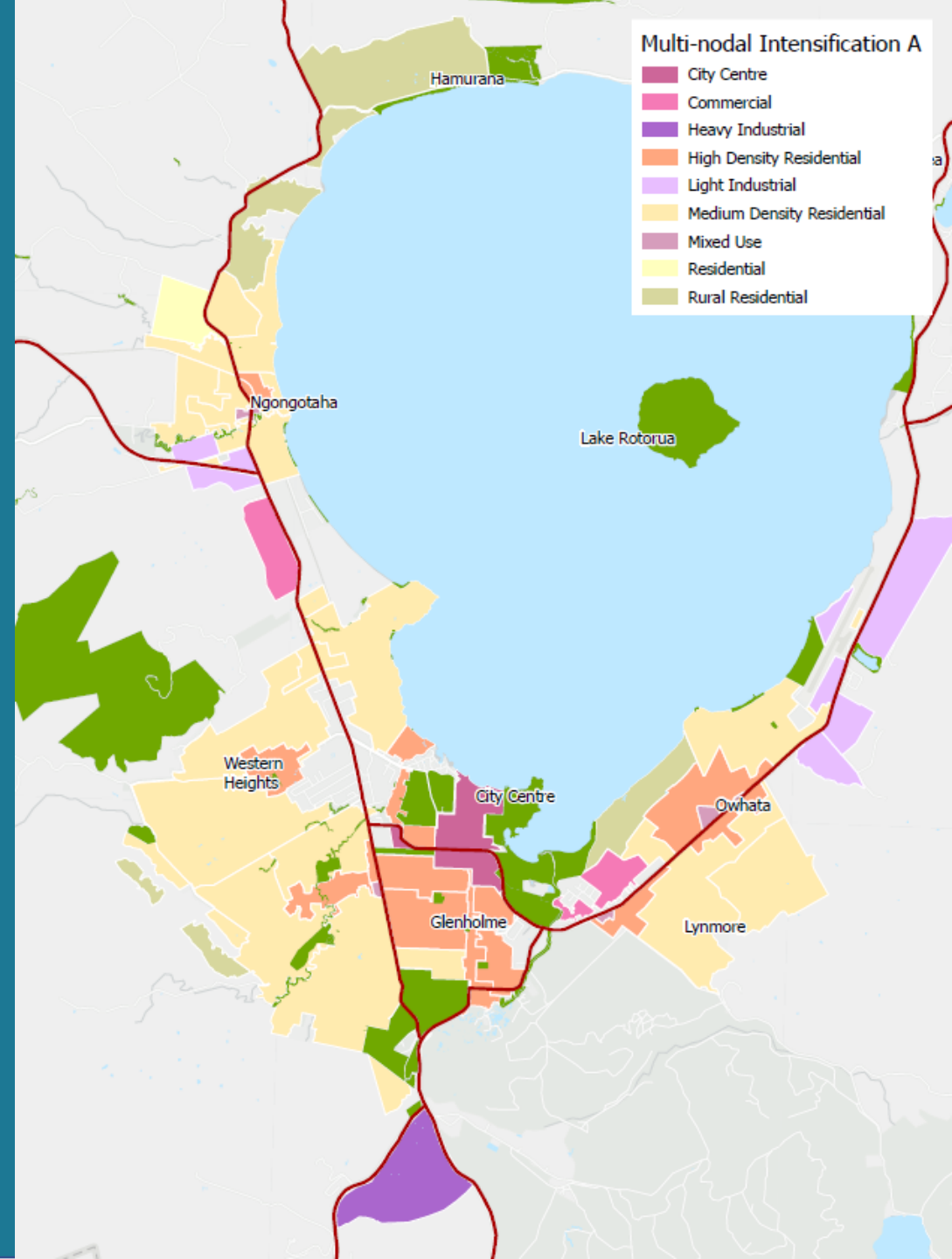
6. EASTSIDE

- Intensification as per proposed PC9 provisions. Greenfield/ higher densities across Eastside focused around Owhata.
- Long-term capacity of 9,350 dwellings. 350 below HBA projections.
- Key assumptions:
 - Potential for 3,900 greenfield dwellings (assumes no infrastructure constraints)
 - 15% of commercially feasible brownfield sites are redeveloped over the next 30-years.
- Levels of intensification 25% below projected demand (4,200 vs 5,600)
- Limited commercially feasible greenfield opportunities due to extent of Māori Freehold Land.



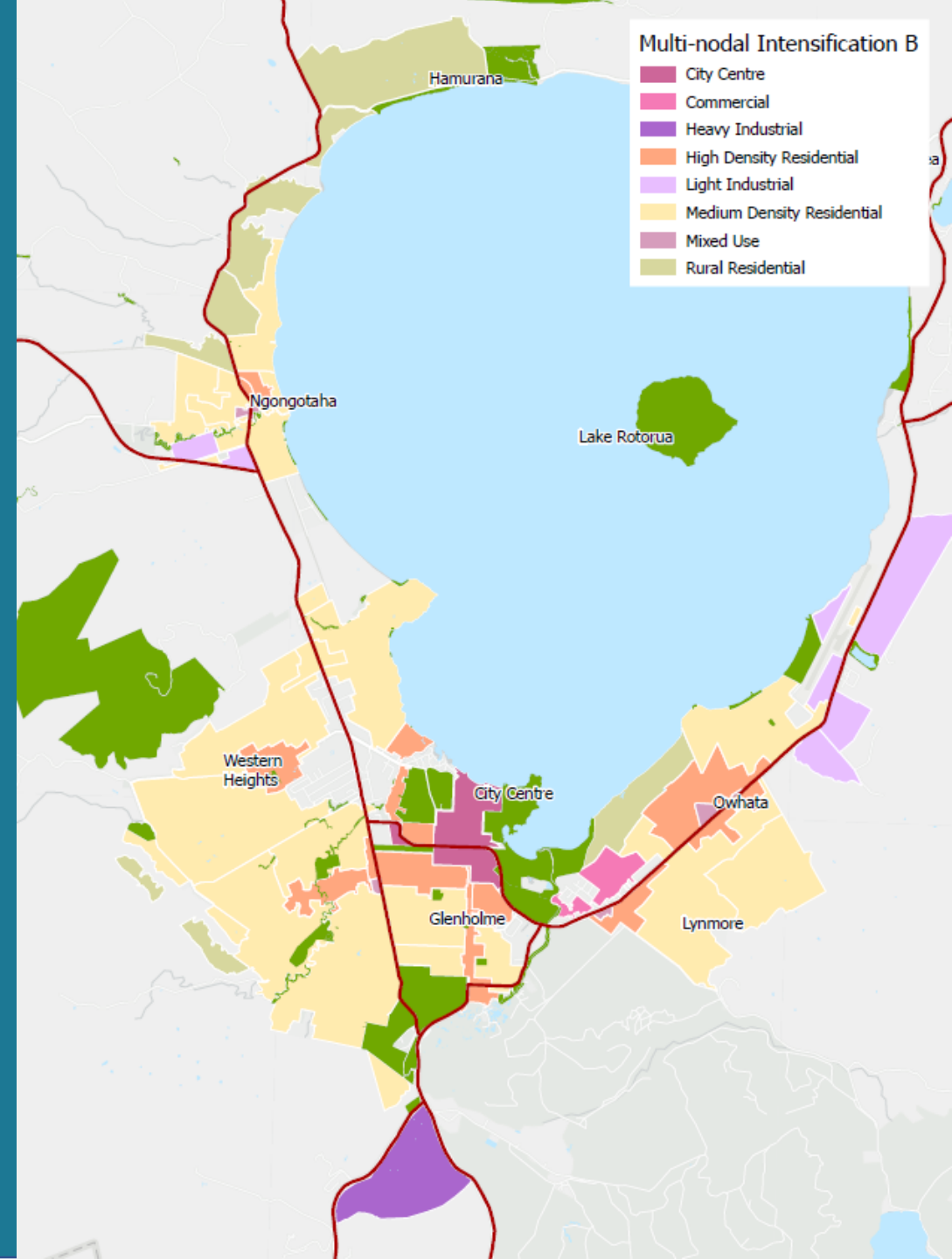
7. MULTI-NODAL A

- Increased densities above PC9 around key nodes. Reduced densities in Ngongotaha and Fairy Springs from original scenario.
- Long-term capacity of 11,400 dwellings. 1,700 above HBA projections.
- Key assumptions:
 - Pukehangi and Wharenuī built out based on current masterplans (750 & 1,000 dwellings)
 - Additional greenfield (2,000 dwellings) enabled around Ngongotaha to increase competition.
 - 20% of commercially feasible brownfield sites are redeveloped over the next 30-years.
- Levels of intensification 11% above projected demand (6,200 vs 5,600).
- Locational choice for both HDRZ and greenfield enabled.



7. MULTI-NODAL B

- No new greenfield. Increased densities above PC9 around key nodes. Reduced densities in Glenholme, Ngongotaha and Fairy Springs from S2.
- Long-term capacity of 11,200 dwellings. 1,500 above HBA projections.
- Key assumptions:
 - Pukehangi and Wharenui built out based on current masterplans (750 & 1,000 dwellings)
 - Additional greenfield (1,000 dwellings) enabled north of Koutu to provide some competition.
 - 25% of commercially feasible brownfield sites are redeveloped over the next 30-years.
- Levels of intensification 34% above projected demand (7,500 vs 5,600)
- Locational choice for both HDRZ and greenfield still enabled.



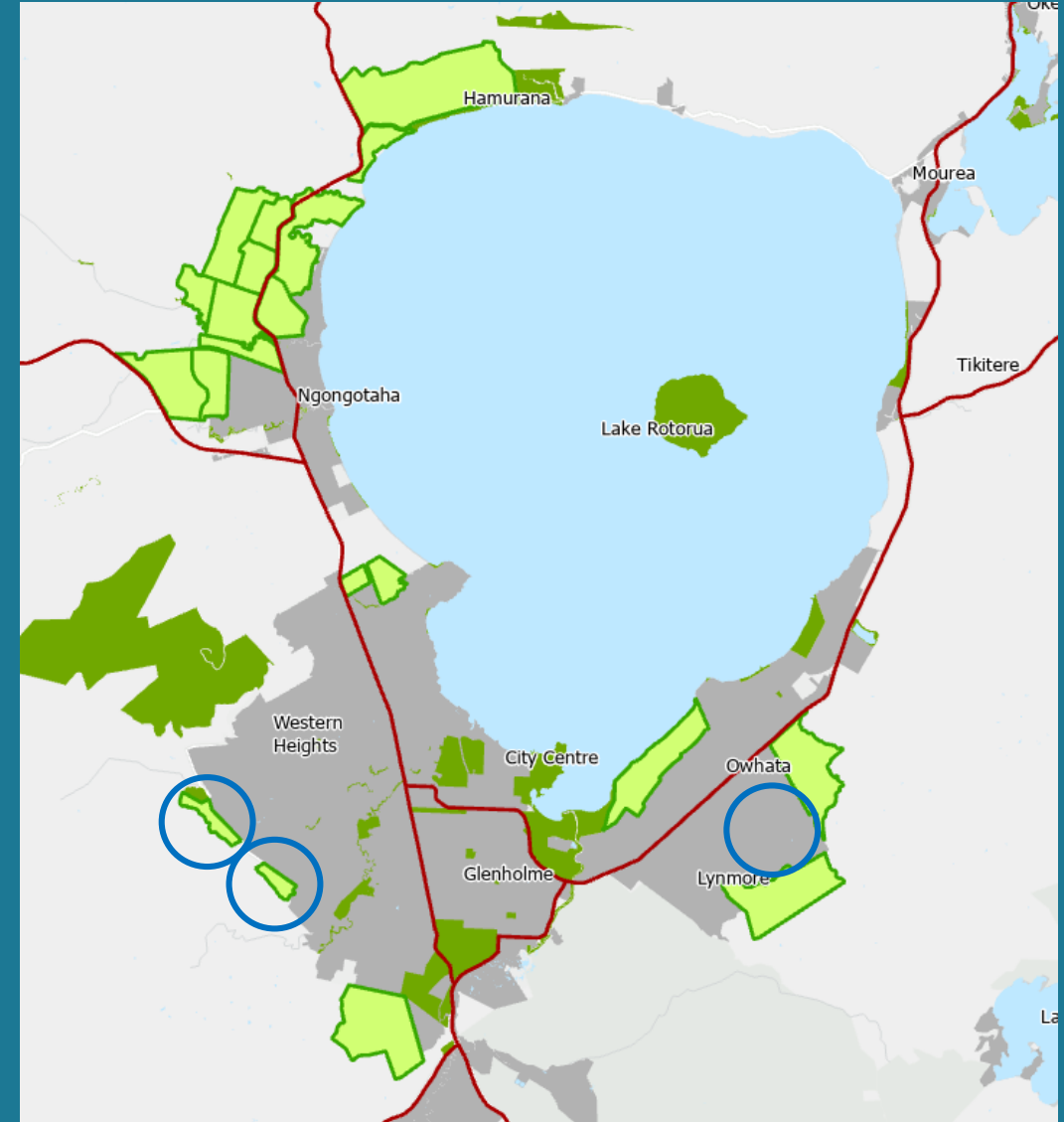
SUMMARY

	Basecase A	Basecase B	Ngongotaha Growth	Multi-nodal Intensification	SH36 Growth Corridor	Eastside Growth	Multi-nodal Intensification A	Multi-nodal Intensification B
Feasible Intensification	28,817	28,886	30,320	31,066	30,320	29,970	31,066	30,320
Intensification realised	6,974	5,055	5,306	7,767	3,032	4,496	6,213	7,580
Underutilised Urban Land	979	979	979	979	979	979	979	979
Existing Greenfield*	1,785	1,785	1,785	1,785	1,785	1,785	1,785	1,785
New Greenfield	0	4,703	4,403	270	8,790	2,094	2,475	936
Total Capacity	9,738	12,522	12,473	10,801	14,586	9,354	11,452	11,280

* Based on current masterplans for Pukehangi/ Wharenui

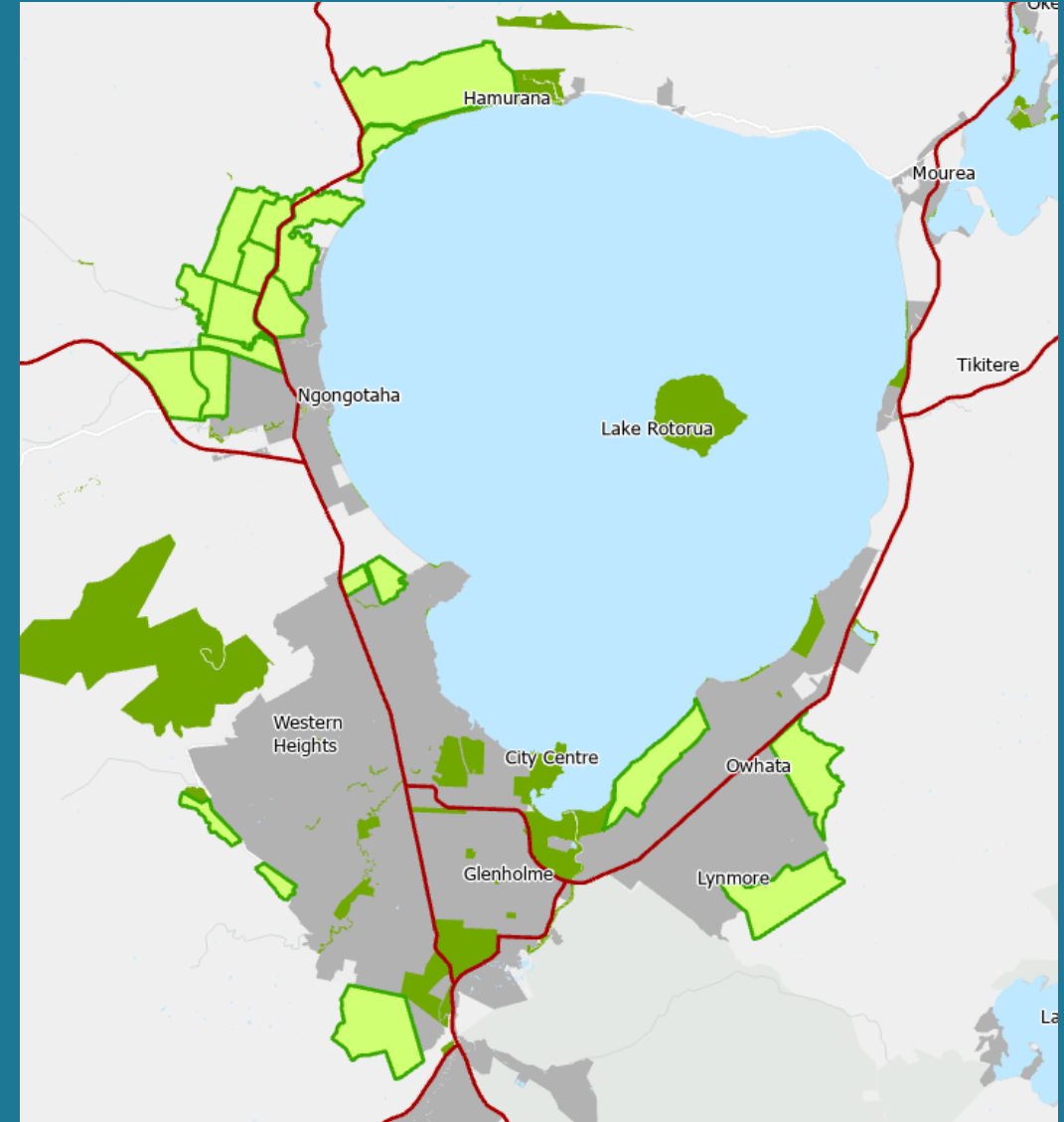
ANALYSIS

- Two existing “greenfield” areas in Rotorua – Pukehangi and Wharenui.
- Masterplanned for 1,700 dwellings (potential capacity with PC9 for 3,400).
- 4 landowners total (3 @ Pukehangi, 1 @ Wharenui).



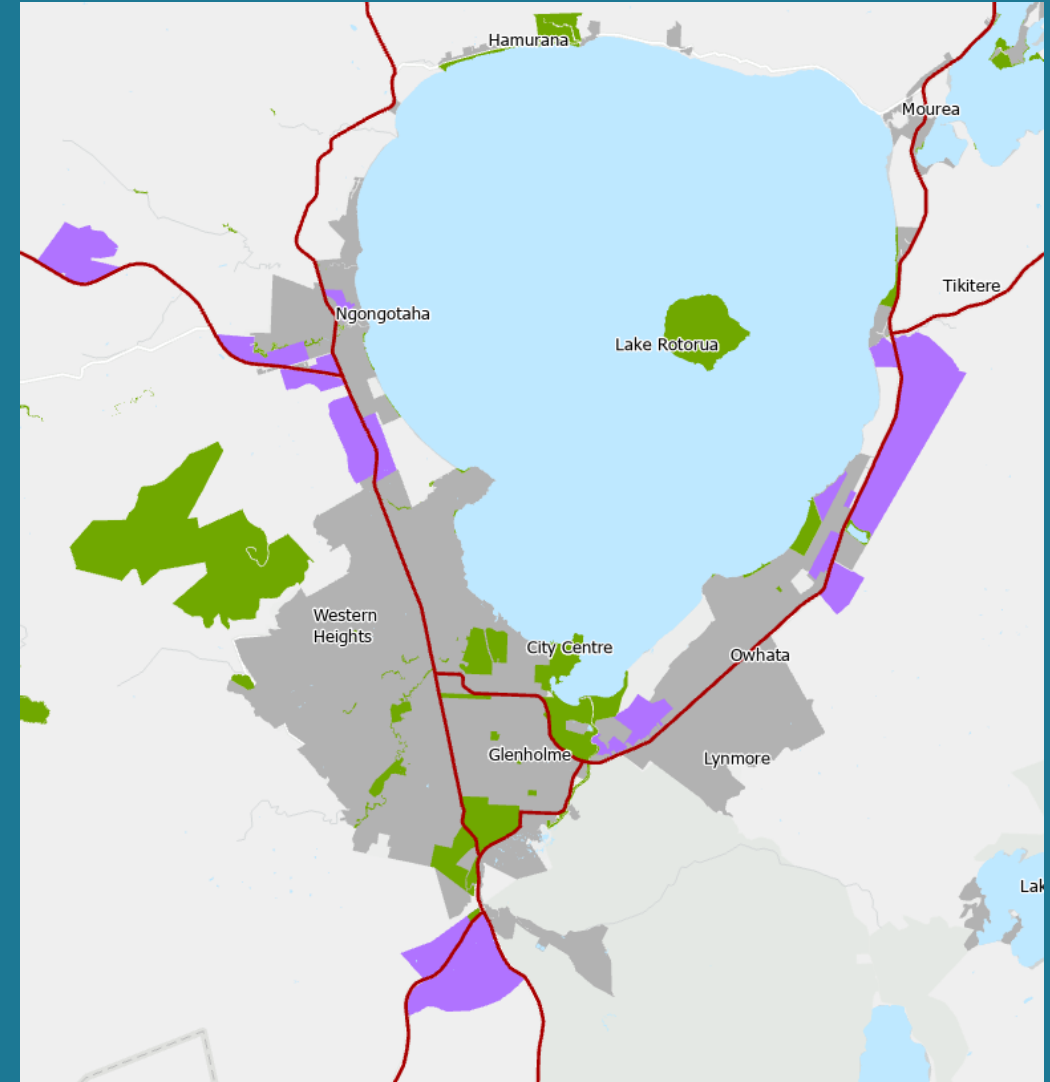
ANALYSIS

- 17 additional Greenfield areas considered under different scenarios.
- 10 are largely unfragmented (single owner or a handful of owners with large separate parcels).
- Ngatiwhakaue Tribal Lands a major/sole landowner in four of the 10 unfragmented sites.
- Maori freehold land may impact timeframes to realise development.

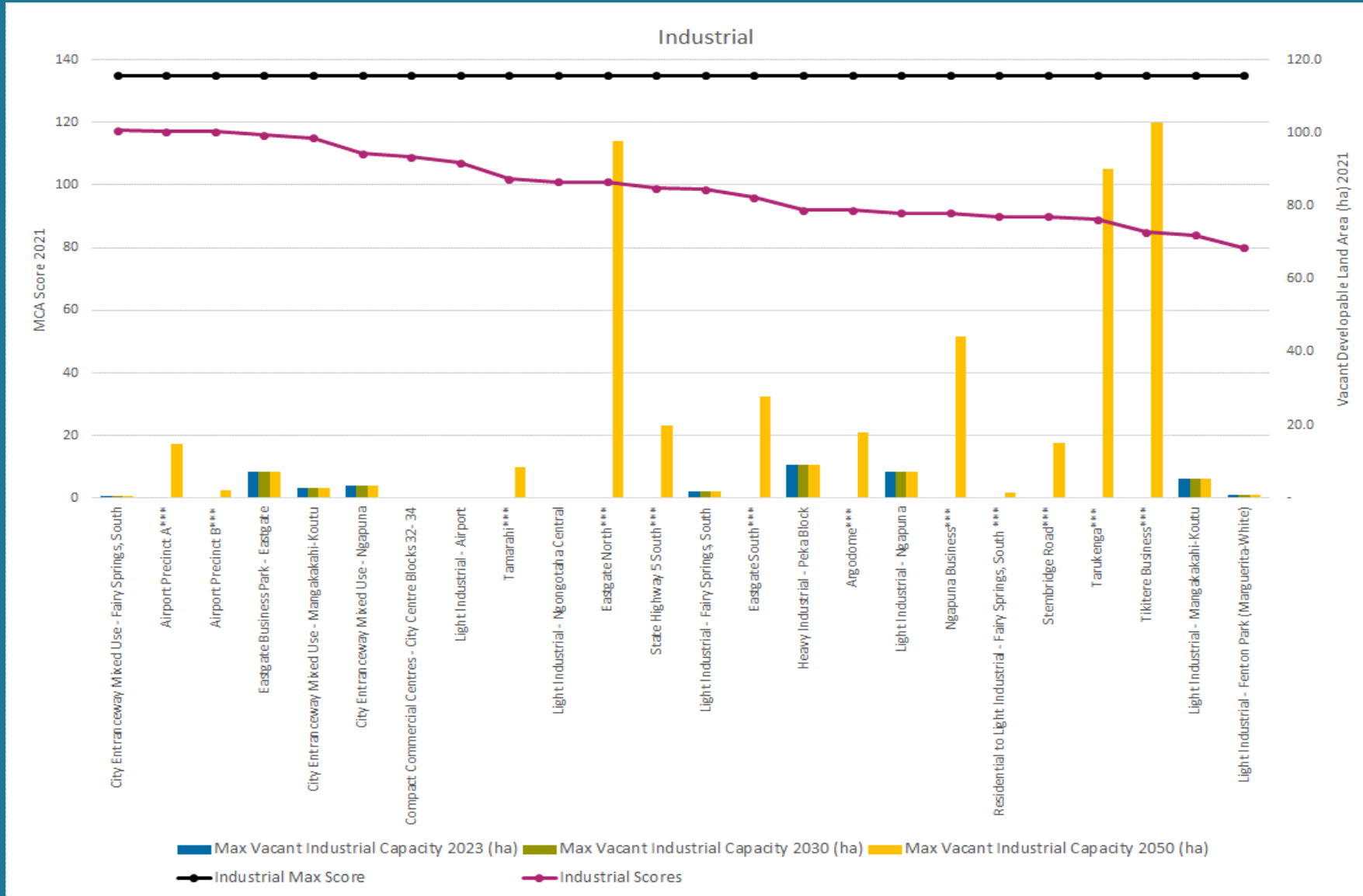


SITES

- Business sites identified in each scenario
- M.E. undertook MCA of business sites according to the methodology in the HBA
- Criteria applied and weighted to reflect type of business use:
 - Ability to provide buffer / manage reverse sensitivity
 - Size/flexibility/suitability
 - Ability to use geothermal energy
 - Transport access & distance to port & airport
 - Co-location
 - Exposure / profile
 - Natural hazards & infrastructure
 - Ownership structure
 - Proximity to labour and market
- Will use scoring to inform overall evaluation of the scenario



SITES



RECEIVED

- BoPRC, Kainga Ora and MoE
- Generally agree with comments and will address in refined versions of the constraints mapping report, outcomes & the FDS itself
- Evaluation framework feedback
 - Use of scoring and weighting in the evaluation
 - Capacity criterion
 - Recognising opportunities
 - Separating types of other infrastructure
- Any other feedback before we progress with the evaluation?



NEXT STEPS

- Your feedback on the refined scenarios – anything further to refine?
- Evaluation of scenarios – progressive updates to TAG using this forum
- Refined capacity numbers to inform:
 - Infrastructure evaluation
 - VKT analysis
 - MoE analysis of school requirements (high level)
 - Open space network planning (being progressed in parallel)
- FDS drafting and development on-going
- Further mana whenua engagement and political reporting early 2023



Questions & discussion



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