

Laura Bowman

From: official information
Sent: Wednesday, 3 November 2021 11:55 am
To: [REDACTED]
Cc: official information
Subject: Final Response: LGOIMA 21313 - [REDACTED] - Market Preference Survey / Housing / Beca 2001
Attachments: Market Preference Survey Results - background data for Growth Scenario Project - August 2001.PDF

Kia Ora,

I refer to your **information request below**, Hamilton City Council is able to provide the following response.

Please see attached, the report which you have requested below.

Note – this report was prepared in 2001 and as such, was based on the market at the time.

You have the right to seek an investigation and review by the Ombudsman of this decision. Information about how to make a complaint is available at www.ombudsman.parliament.nz or freephone 0800 802 602.

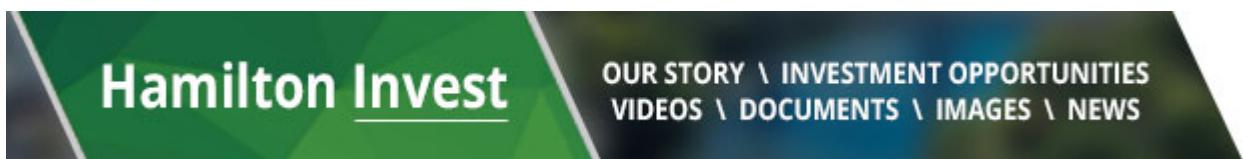
Kind Regards,

Tatiyana | Official Information & Legal Support Advisor
Legal Services & Risk | People and Organisational Performance
Email: officialinformation@hcc.govt.nz



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From: official information <officialinformation@hcc.govt.nz>
Sent: Tuesday, 26 October 2021 11:51 am
To: [REDACTED]
Cc: official information <officialinformation@hcc.govt.nz>
Subject: LGOIMA 21313 - [REDACTED] - Market Preference Survey / Housing / Beca 2001

Kia Ora,

I write to acknowledge your information request of Tuesday 26 October 2021 as below.

Please be advised that your request has been passed on to the relevant team within Council and you will be informed of the outcome.

The Local Government Official Information and Meetings Act 1987 requires that we advise you of our decision on whether the Council will provide the requested information as soon as reasonably practicable, and no later than 20 working days after the day we received your request. We will respond to you no later than Tuesday 23 November 2021.

In light of the recent announcement regarding COVID-19 and New Zealand's Alert level 3, the safety of our employees is paramount. We've made necessary changes to our working environment and operations that may result in limited availability of some of our staff members. We appreciate your patience during this time. Please allow some extra time for a response to your request as we are all doing our best to accommodate the new circumstances.

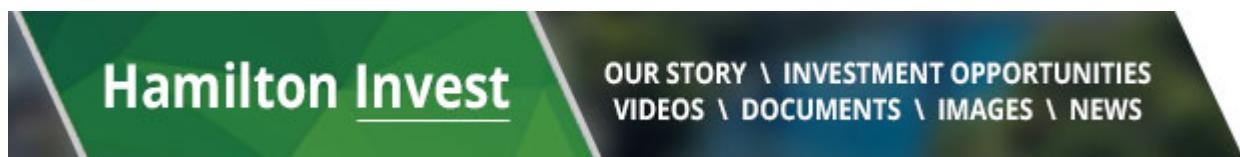
Kind Regards,

Tatiyana | Official Information & Legal Support Advisor
Legal Services & Risk | People and Organisational Performance
Email: officialinformation@hcc.govt.nz



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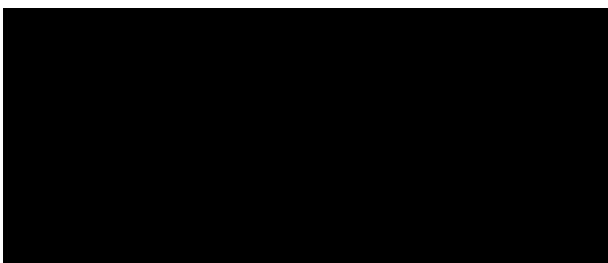


From: [REDACTED]
Sent: Tuesday, 26 October 2021 10:30 am
To: official information <officialinformation@hcc.govt.nz>
Subject: Market Preference Survey/Housing/ Beca 2001

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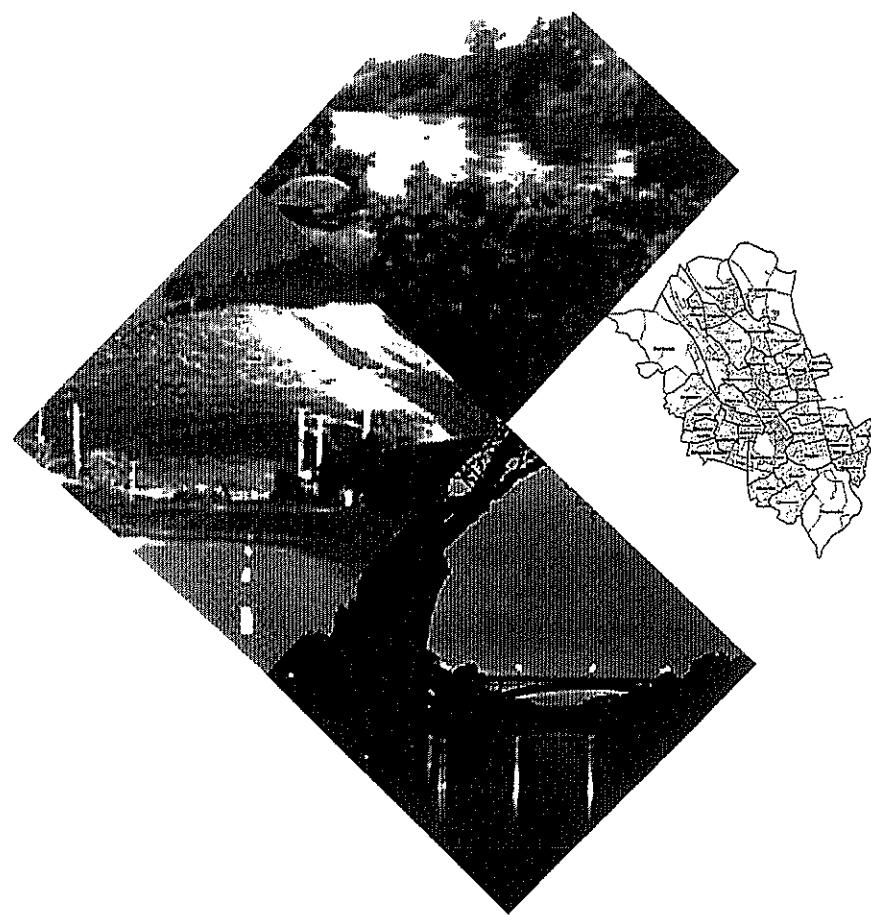
This report was referred to in a 2007 report titled Intensification Study/ Infill Housing assessment 2007 by HCC. Please provide a copy of the Beca report of 2001. Thanks

Kind Regards



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Market Preference Survey Results



Prepared for Hamilton City Council



Market Preference Survey Results

Report

Prepared for

Hamilton City Council

Report

Market Preference Survey Results

Prepared for

Hamilton City Council

By

Beca Carter Hollings & Ferner Ltd

August 2001

Hamilton City Council
Private Bag
HAMILTON

10 August 2001
Our Ref. 2120001/200
L1:50376-Ajl16r01.doc

Attention: Mike Theelen/ Mark Brougham

Dear Sirs

Market Preference Survey Results

Attached please find the draft 'Market Preference Survey Report' which forms part of the background data for the Hamilton City Council Growth Scenario Project.

Please note that we are currently trying to arrange final interviews with the Airport, Transit, TransRail and Tainui. Outcomes of these will be incorporated into the final report and Growth Scenario analysis. We would also like to meet with you both to discuss the findings of this and the other reports and obtain your comments on these prior to finalising them and preparing the executive summary report for the project.

Please do not hesitate to contact either Don Lyon or myself should you have any queries or wish to discuss any of the reports' content.

Yours faithfully
Beca Carter Hollings & Ferner Ltd

John Duffy

Senior Planner

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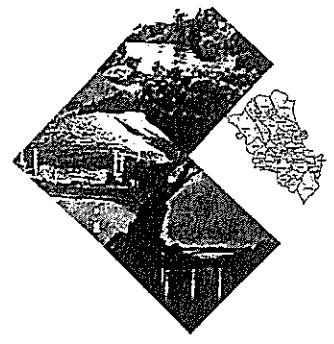
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- Appendix A *Residential Questionnaire Form***
- Appendix B *Residential Market Confidence***
- Appendix C *Industrial/ Commercial Questionnaire Form***
- Appendix D *Market Confidence By Industry***



Introduction

1 *Introduction*

Beca Carter Hollings & Ferner Ltd has been commissioned by Hamilton City Council to undertake a review of available demographic and market information and provide technical data to assist the Council in confirming a growth scenario, for the purpose of developing Part 2 of their Strategic Plan.

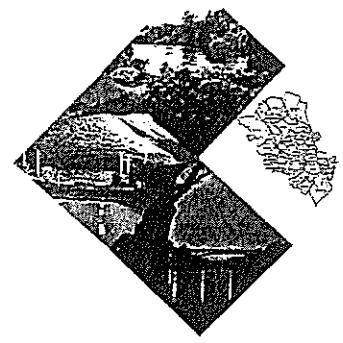
This report which is one of four technical data reports currently being prepared, provides a summary of input and commentary received from key sector groups and development interests on the current market trends and development in Hamilton City. Outcomes of the analysis undertaken and responses received to prepare this report, and the other background reports being prepared will be drawn together in a final "executive summary" report. Two key sources of input are documented in the report:

- Results from two surveys:
 - Residential Market Perceptions Survey; and
 - Commercial / Industrial Market Perceptions Survey.
- Qualitative feedback from consultation meetings with representatives of key stakeholders.

The remainder of this report is set out as follows:

Section 2	Residential Market Trends - provides a summary of key results from the residential market perceptions survey and identifies important market trends identified in survey responses.
Section 3	Industrial / Commercial Trends - provides a summary of the key results from the industrial/commercial perceptions survey and identifies important industry and development trends.
Section 4	Consultation Results - provides a summary of the consultation feedback from interviews with representatives of key sector stakeholders.
Section 5	Summary - provides key results from the market perceptions analysis and highlights aspects of these results relevant for the growth scenario projects for Hamilton City.

It is intended that the data and findings presented in this report will assist in the development of overall 'growth scenarios' for Hamilton City. Developing such scenarios is critical for managing short to long term effects of urban growth on social, economic, environmental and accessibility issues. Better long term strategic planning ultimately enables Hamilton to grow into a form of choice, not chance. This report supports this goal.



Residential Market Trends

2 *Residential Market Trends*

In total, 38 sets of questionnaires were sent to key sector groups involved in the Hamilton property market. The residential and industrial/commercial questionnaires were sent to all parties irrespective of where their primary interest lies. In total, 7 respondents completed the residential market perceptions survey (approximately 15% of the total sample population). A copy of the survey is provided in Appendix A of this report.

While the total number of surveys received is low, it is noted that the sample population was small and that this response rate is consistent with expected response rates for a postal questionnaire. It is also noted that a number of recipients to the questionnaires responded to one or the other of the questionnaires (indicating that they had limited interest in the alternative sector).

The questionnaire was divided into four sections:

- Part 1: General;
- Part 2: Market Demand;
- Part 3: Geographic Demand; and
- Part 4: Market Trends.

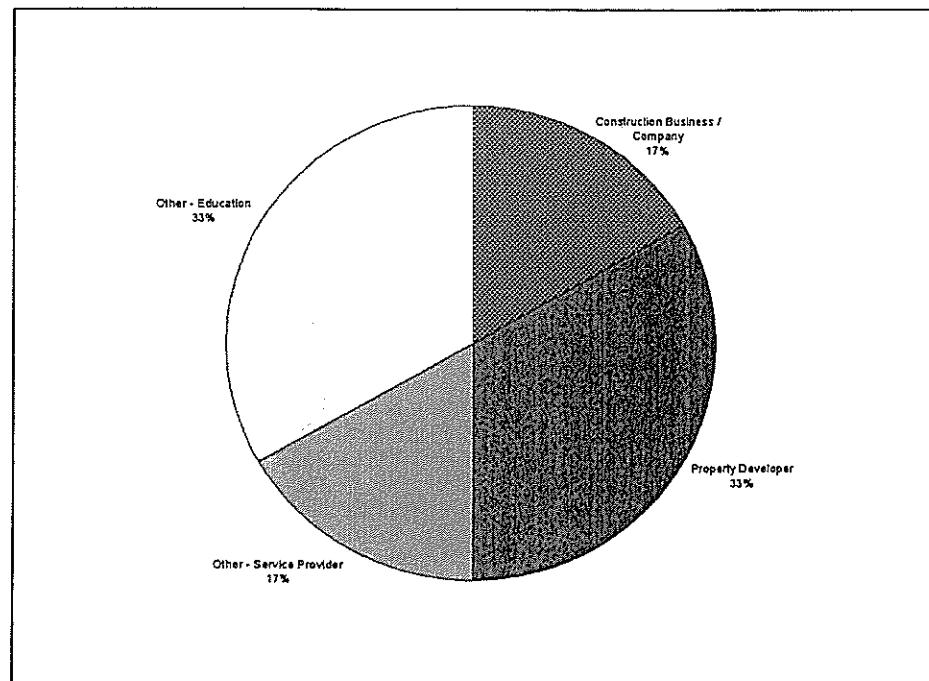
The remainder of this section summarises the results from each of these sections of the questionnaire.

2.1 General

2.1.1 *Respondents Business*

Figure 2.1 below provides a summary of the areas of business interest from respondents. It is noted that no responses were received from real estate agents, property managers or valuers/surveyors. Comments from representatives of these sectors were however gathered during the interview process and these are detailed in section 4 of this report.

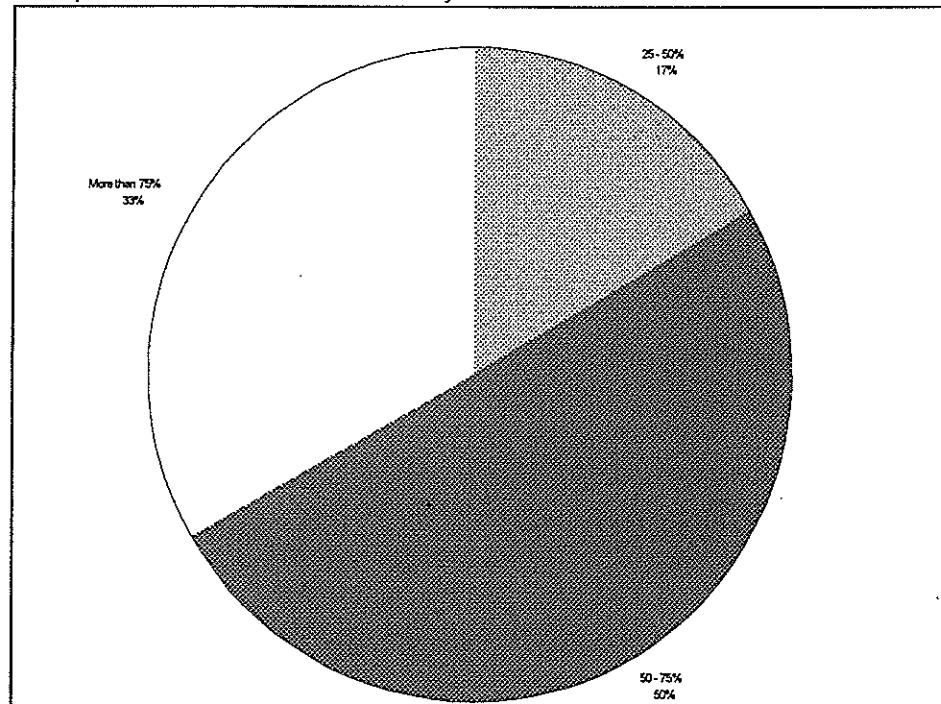
Figure 2.1 Respondents Business



2.1.2 Proportion of Business in Hamilton City

Figure 2.2 below indicates that the majority of respondents had 50% or more of their business in Hamilton City.

Figure 2.2 Proportion of Business in Hamilton City



2.1.3 Proportion of Business in Market Segments

In total, 4 respondents indicated that less than 25% of their business was in the sale or development of residential property. For the remaining two respondents, their business involved the sale/development of the following:

- Residential (over 50% for both respondents);
- Rural lifestyle (rural – residential) (25-50% for 1 respondent); and
- Mixed business and residential business (50-75% for 1 respondent).

2.2 Market Demand

This section of the questionnaire sought information on the current residential housing market in Hamilton City. It is noted that only 4 of the 6 respondents answered this section of the questionnaire.

2.2.1 Demand for Residential Property Types

The survey indicated slight to moderate demand for the range of residential property opportunities, which can be grouped into::

- Newly Constructed Dwellings;
- Existing Dwellings; and
- Vacant Sites.

2.2.2 Demand for Housing Types

The scatter diagram below provides a guide to the perceived demand for the following housing types in Hamilton City.

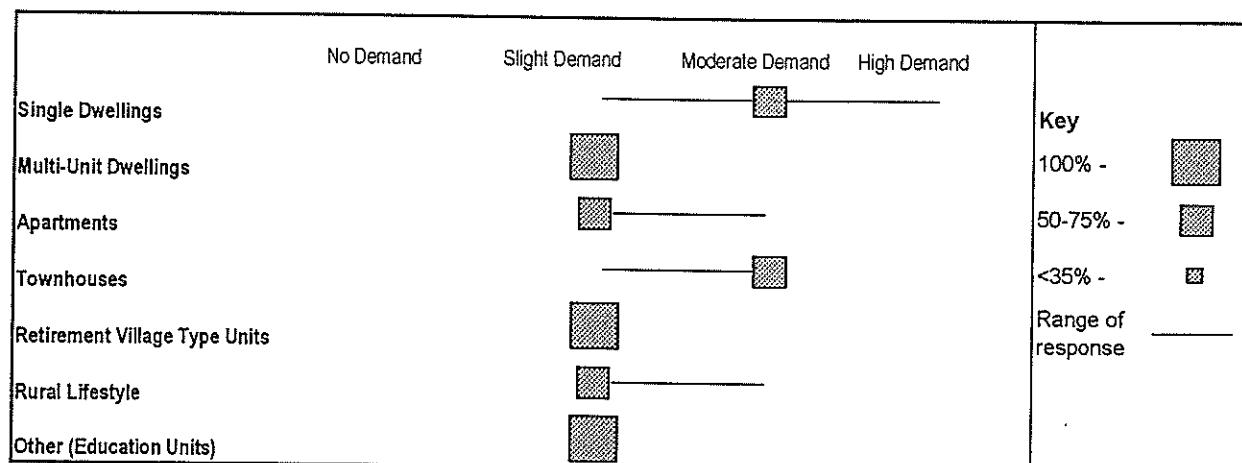


Figure 2.3 Current Market Demand for Housing Types

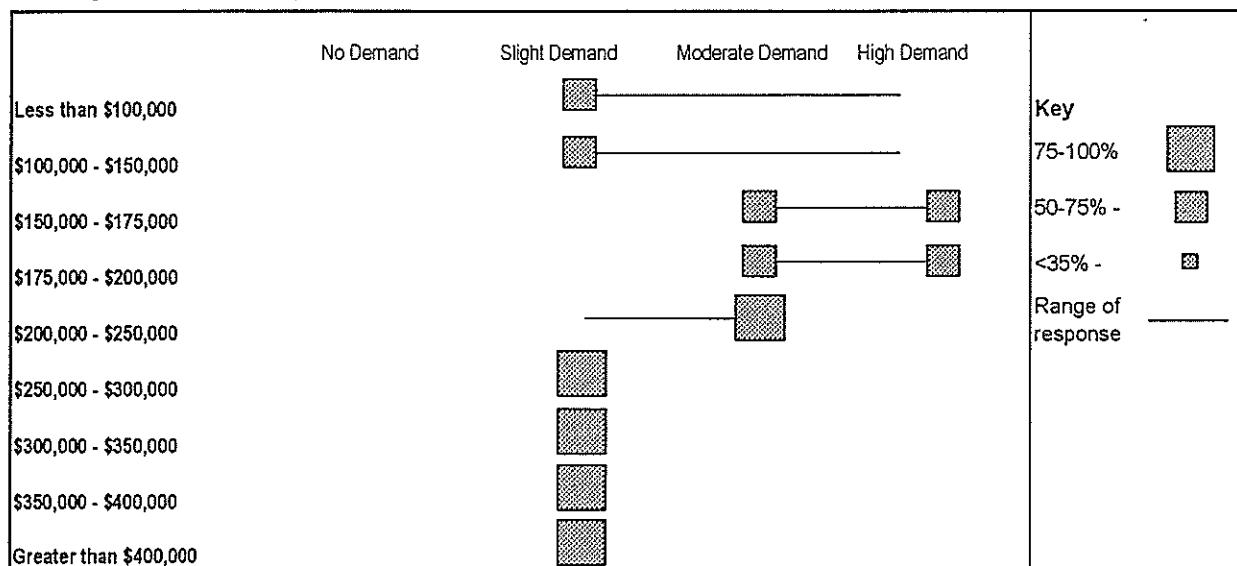
Overall, the demand for housing types was considered slightly positive. The highest demand (and the greatest range of perceptions of demand) was for single dwelling houses,

although townhouses were also identified with moderate demand. This is consistent with the responses received on geographic demand trends (see section 2.3 below). There was also a slight demand for rural lifestyle blocks, although much of the demand for this type of development is actually created and taken up in areas adjoining the city (eg. Waikato District).

2.2.3 Demand by Price Brackets

The scatter diagram below provides a summary of respondents perceived market demand for different market price brackets. This identified a wide range of responses, although a greater number in the \$250,000 plus price bracket.

Figure 2.4 Demand by Market Price Bracket



2.3 Geographic Demand

Respondents were asked to identify areas where they considered residential property demand was high and where the market was 'stagnant or depressed' or where there was a current oversupply of residential properties. Only four respondents identified areas where there was current high residential property demand and only two respondents identified areas where the market was currently depressed or where there was an oversupply.

2.3.1 Areas of High Residential Property Demand

Figure 2.5 below highlights those areas that were indicated as currently having high residential property demand.

The following table provides a summary of the feedback and commentary provided for each of these areas. It is noted that, consistent with section 2.2 above, demand in these areas was characterised by single dwelling and town house housing types.

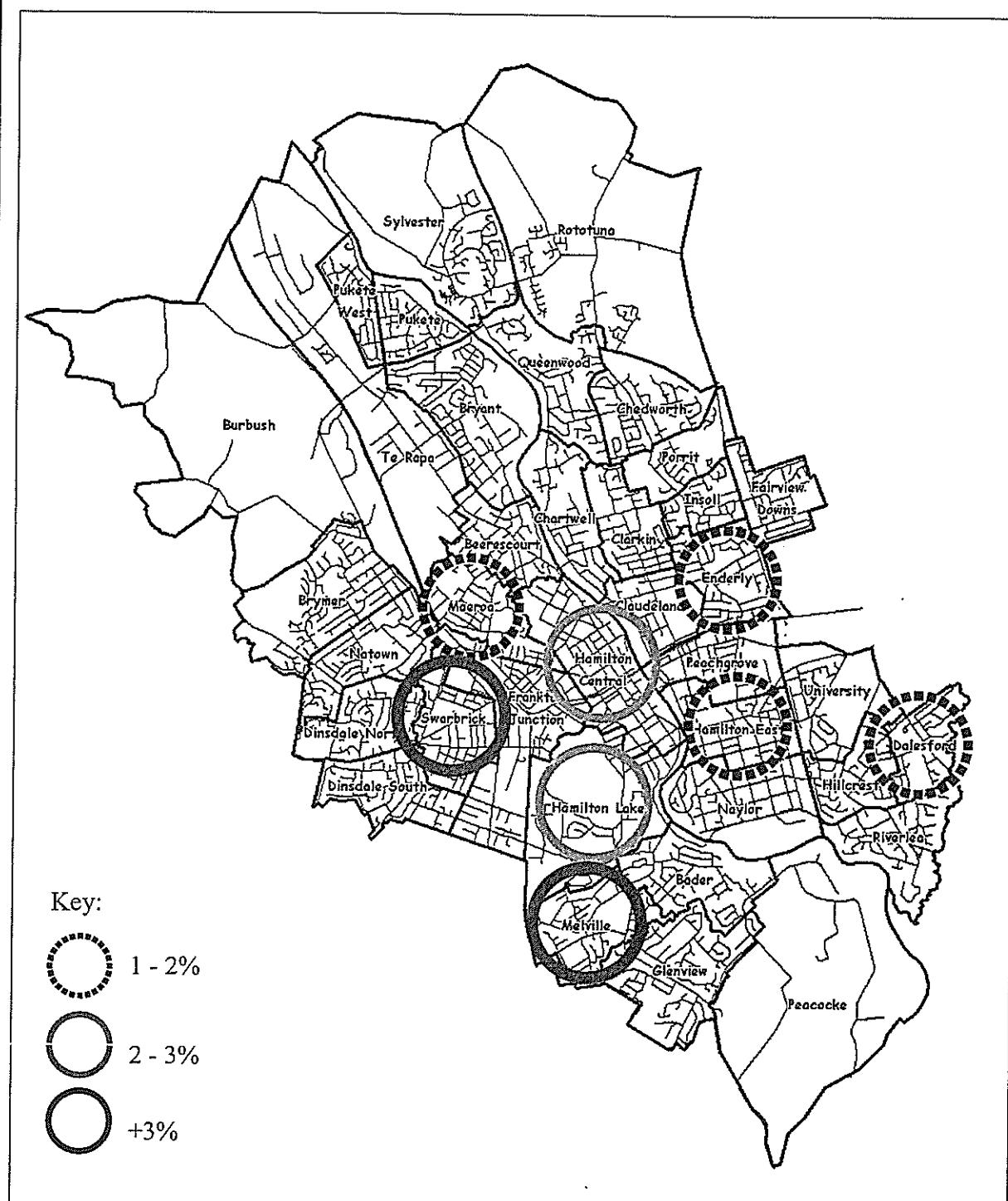


Table 2.1:
Areas of High Residential Market Demand

Area ¹	Housing Types	Demand Segment
Rototuna (4/5)	Residential (2) New Single Dwellings	Families (3), elderly (2)
Sylvester (3/5)	Residential New Single Dwellings	Families (2), elderly
University (2/5)	Single Dwellings Existing multi-unit & Single	Families Students / Students & Families
Hamilton Central (1/5)	Apartments / Infill	Younger People
Frankton J (1/5)	Infill	Young Couples, Families
Brymer (1/5)	New Single	Families
Glenview (1/5)	New Single	Family
Dinsdale (1/5)	Existing Single	Family
Pukete (1/5)	Existing Single	Family
Hillcrest (1/5)	Existing Dwellings	Family
Riverlea (1/5)	Existing Dwellings	Family
Hamilton Lake (1/5)	Existing Dwellings	Family

¹ – Indicates the number of respondents (from the total who responded to this section) who identified this area as an area of high market demand

2.3.2 Areas Where the Market is currently Depressed or Stagnant

As noted above, there were only two responses to this question in the questionnaire. Neither respondent identified the same areas. Areas identified, and features which were considered to contribute to this, are summarised below:

- Sylvester & Rototuna – “Too many sections being developed”; 
- Nawton & Dinsdale – “Too much infill housing, poor quality, worst always drop out the bottom”; 
- Brymer & Dinsdale – “The area has been developed to a price that targeted the lower income group. Houses prices in a very narrow price band, not an attractive area to building to get capital gain. Houses in the area tend to take a lot longer to sell. “Spec” builders are reluctant to commit unless there is an end purchaser”; 
- Melville & Glenview (2 respondents) – “Many houses now desolate and will be over capitalised for their location if upgraded”, and “House prices in a very narrow price band. Not an attractive area to get capital gain”; 
- University, Hillcrest & Hamilton East – “There is an oversupply of family homes for rental. Market very price sensitive and larger houses remain vacant for quite long periods.” 

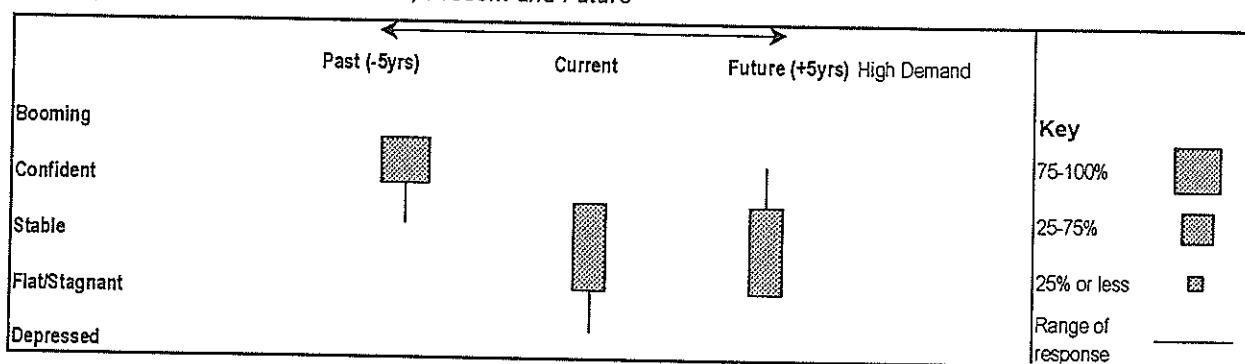
2.4 Market Trends

Part 4 of the questionnaire sought information from respondents on the likely changes and trends in the Hamilton housing market.

2.4.1 Trends in the Residential Housing Market

Respondents were asked to identify (on a 5 point scale) which best described the current, past and future residential property market. Overall, the current market was considered 'flat/stagnant' to 'stable', while five years ago the market was generally considered confident. Respondents indicated a slight optimism for the future residential housing market (with a shift towards a more stable market). These results are shown in summary in Figure 2.6 below. Appendix B provides detailed Figures for questions 4.01, 4.02 and 4.03 relating to residential market confidence.

Figure 2.6 Market Trends - Past, Present and Future



2.4.2 Market Trends by Market Types

Respondents were also asked to identify anticipated trends in market demand for market types. The range of options were: greenfield, infill etc. Overall, the highest proportion of increased demand was identified for greenfield dwellings, with 100% of respondents to this section identifying an anticipated increase in demand.

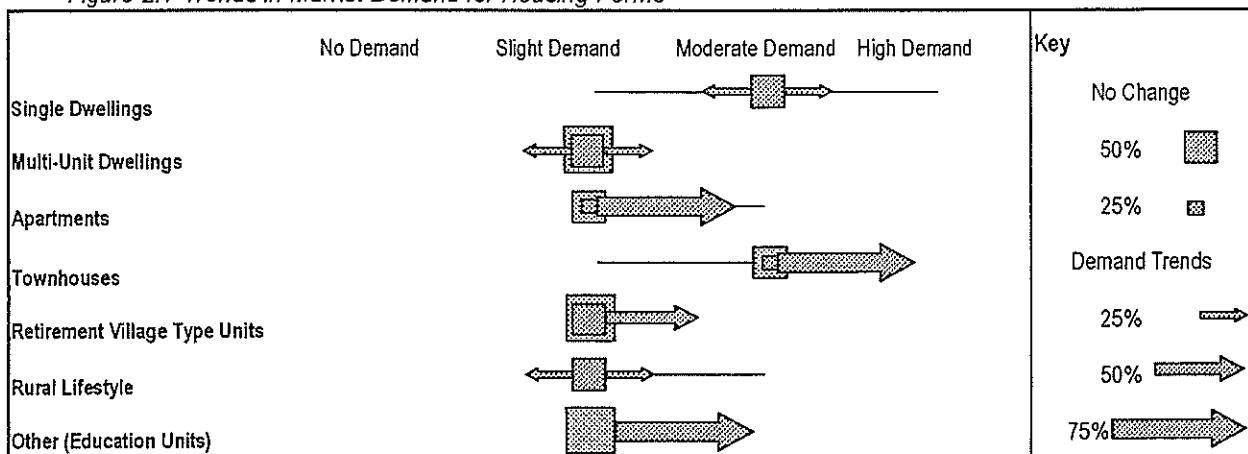
There was a mixed response identified for new 'infill dwellings' with half the respondents indicating an increase in demand with the other respondents indicating either no change or a decline in demand.

Overall, it was anticipated that there would be no change in demand for bare sites/vacant sites (with only two respondents identifying an increase in demand).

2.4.3 Market Trends by Housing Form

Figure 2.7 below summarises the trends in future demand for the different market forms identified in the questionnaire. From these results, respondents indicate an increase in demand for Inner City Apartments and Townhouses with some increase in demand for Retirement Village Type Units. Overall, consistent with the general perception of market trends, there is little increased demand for other market forms.

Figure 2.7 Trends in Market Demand for Housing Forms

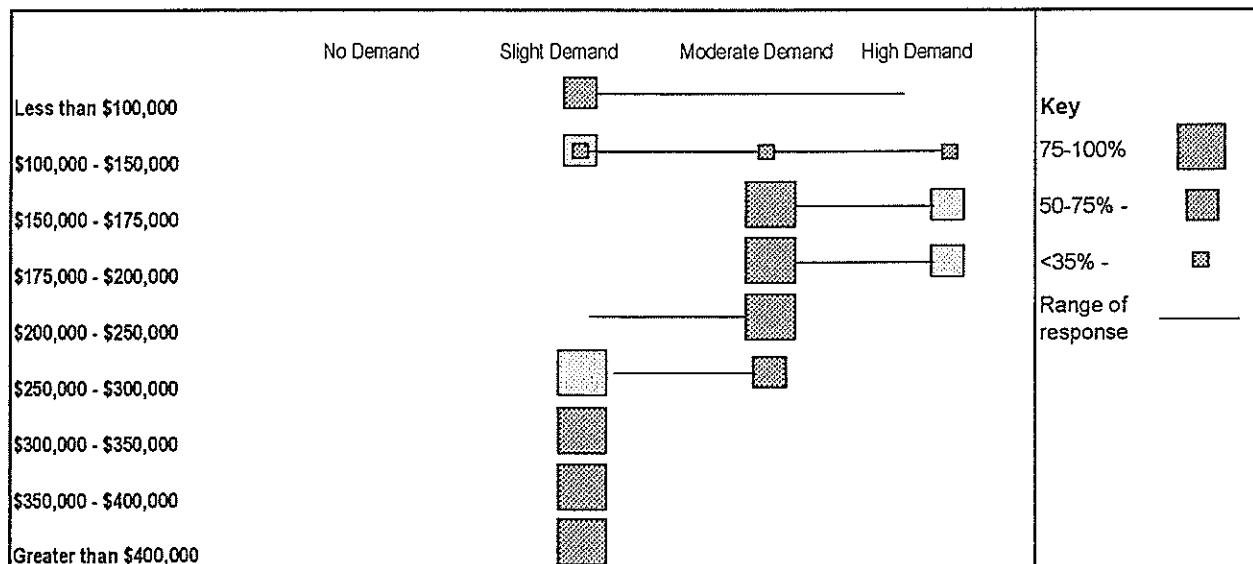


2.4.4 Future Residential Demand by Price Bracket

Respondents were also asked to indicate the likely future residential demand by price bracket. A summary of results to this question is provided in Figure 2.8. For reference, the current market demand for residential properties by price bracket (identified earlier in Figure 2.4) is provided in shadow to this figure.

Overall, the responses indicate little change in market demand by house price, with a slight drop in demand for houses in the price brackets between \$150,000 and \$200,000 and a slight increase in demand for houses in the price brackets \$200,000 to \$300,000.

Figure 2.8 Future Market Demand by Price Bracket



2.4.5 Residential Development Plans

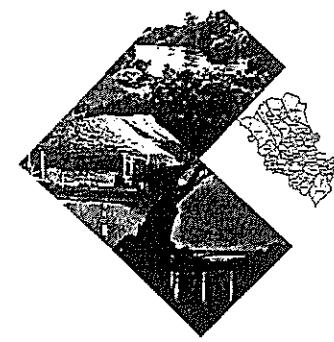
Respondents were asked to identify whether they had any significant residential development plans that could have potential impacts on existing Council infrastructure. Three respondents indicated that they did not.

Two respondents indicated that they had significant development plans for the Rototuna Area (one the River Road North area and the other Flagstaff/Rototuna) and another indicated that they had plans to the north of the city on the western side of the Waikato River. The later respondent indicated that these plans were likely to result in development of this area in the next 2 - 3 years. One late respondent also identified development plans for the Gordonton Road and the Ruakura areas. Given that a structure plan is in place for the development of Rototuna (incorporating the Gordonton Road area), it is unlikely that these developments would have a significant effect on infrastructure. The Ruakura area identified is currently outside the City boundary.

2.5 General Comments

Respondents were also provided an opportunity to make general comments on the Hamilton residential property market. The following provides a summary of responses:

- That there is an oversupply of general student 'flats' and other rental accommodation.
- That there is a niche market demand for single unit/room accommodation for new Asian arrivals.
- That present residential growth is catered for in our land use planning and financial processes.



**Industrial
Perceptions
Survey**

3 *Industrial Perceptions Survey*

In total 11 responses were received to the Industrial Market Perceptions questionnaire. One of these responses was received after the date for the closure of response and while their responses have been recorded in the qualitative assessment, the quantitative evaluation of results has not included this response.

The questionnaire was divided into three sections:

- Part 1: General;
- Part 2: Industry Trends; and
- Part 3: Current Commercial and Industrial Property Trends.

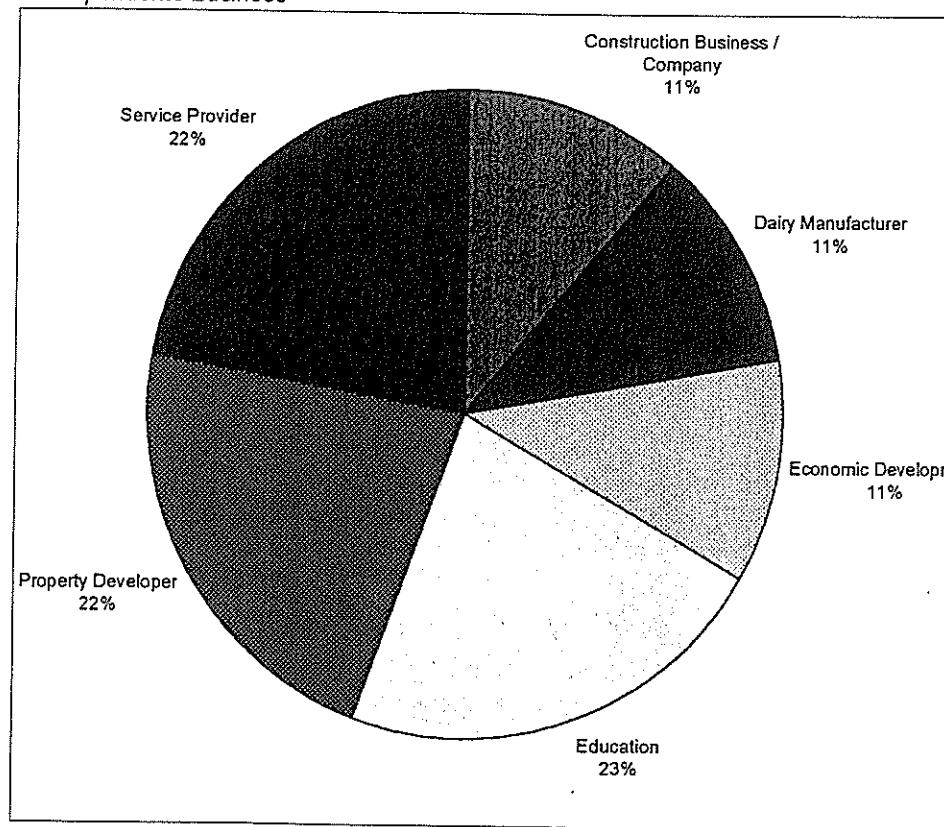
A copy of the questionnaire is attached as Appendix C. The remainder of this section summarises the results from each of these sections of the questionnaire.

3.1 General

3.1.1 Respondents Business

Figure 3.1 below provides a summary of the areas of business interest from respondents. This illustrates a range of interests from across the city have been included in this assessment which is positive as the city does have a broad industrial and commercial base.

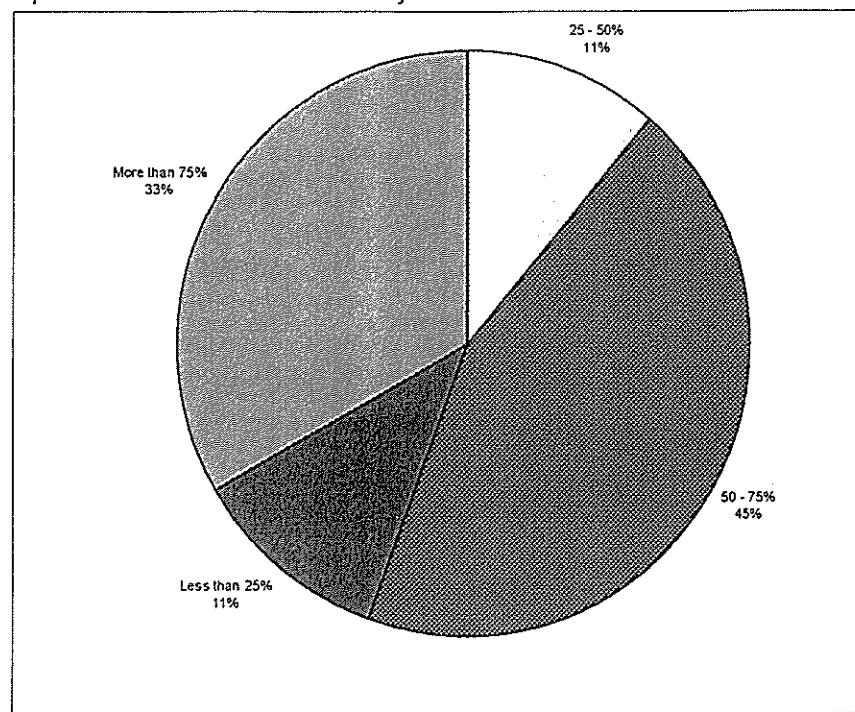
Figure 3.1 Respondents Business



3.1.2 *Proportion of business in Hamilton City*

Figure 2.2 below indicates the proportion of business from each respondent in Hamilton City. The results indicate that the majority of respondents had 50% or more of their business in Hamilton City. It is noted that businesses participating in the survey were selected because of their involvement in the local market. It is likely that other businesses involved in the local market not surveyed will have interests and opinions not represented by these results.

Figure 3.2 Proportion of Business in Hamilton City



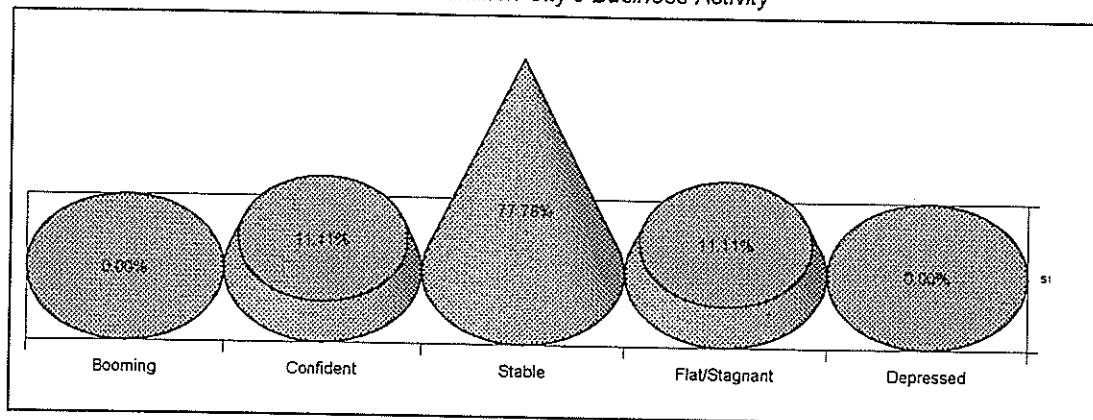
3.2 Industry Trends

Part 2 of the questionnaire sought feedback from respondents on business and commercial trends in Hamilton City. Respondents were asked to provide feedback on their perceptions of current and future market trends.

3.2.1 *Current Business Activity in Hamilton City*

Respondents were asked to describe current overall business in Hamilton City. The majority of respondents (some 80%) identified the market as 'stable'. This contrasts with the residential perceptions survey, where a higher proportion of respondents provided a negative feedback to current market perceptions. Figure 3.3 below summarises existing market confidence in business activity in Hamilton City.

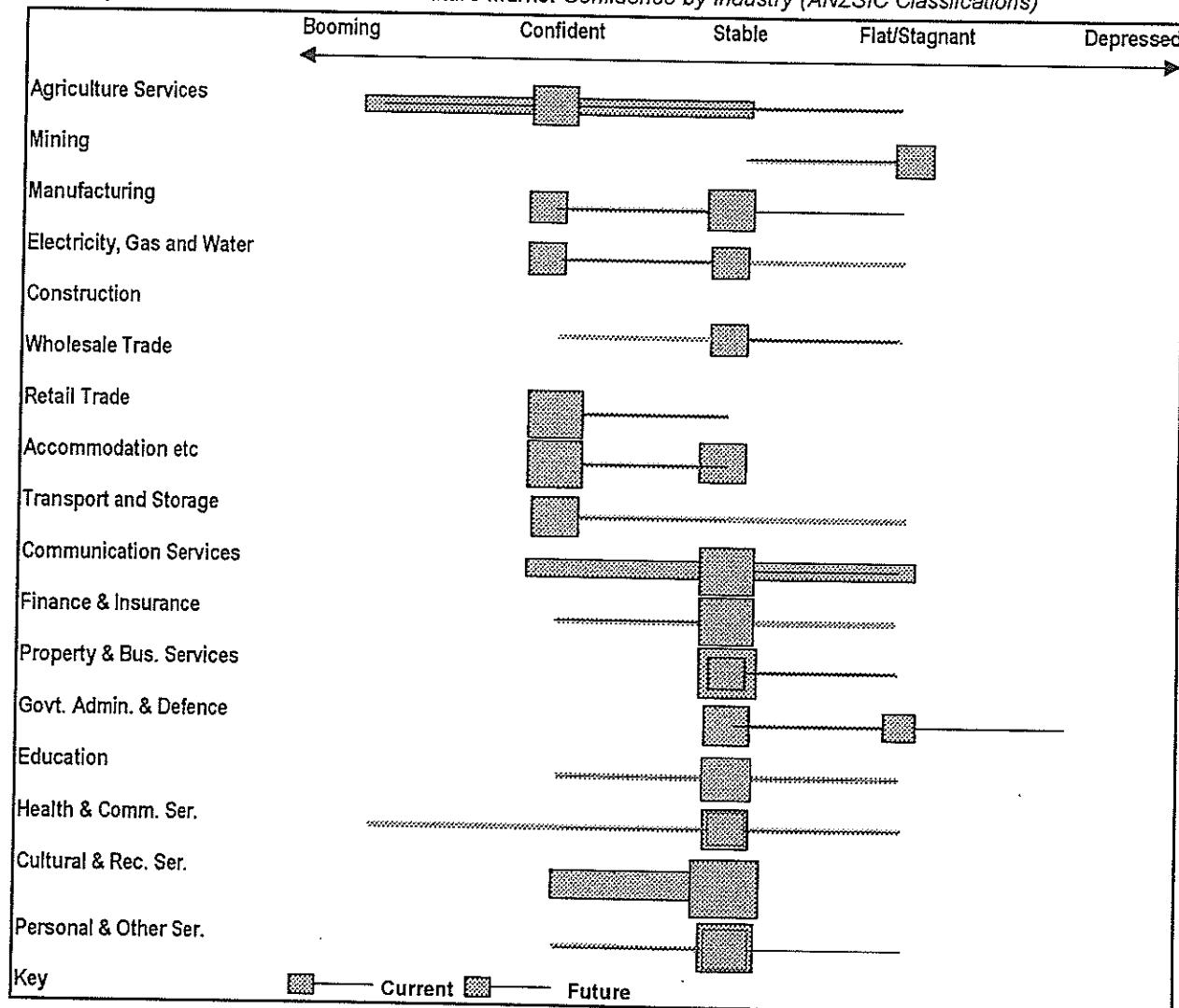
Figure 3.3 Current Market Confidence in Hamilton City's Business Activity



3.2.2 Industry Business Confidence

The questionnaire also sought respondents' feedback on the current and future market confidence for the 12 industry classifications identified. A summary of responses received is provided in Figure 3.4 below. Appendix D provides a table summary of results.

Figure 3.4 Perceived Current and Future Market Confidence by Industry (ANZSIC Classifications)



Overall, as shown in Figure 3.4, there is general confidence in future market trends for industry, particularly for the following industries:

- Agriculture Services; and
- Wholesale Trade

There a notable increase in market confidence for the future of the following industries:

- Construction;
- Manufacturing; and
- Government administration and defence industries.

In contrast respondents indicated a decline in market confidence for the following industries:

- Communication Services;
- Retail Trade; and
- Accommodation, Café and Restaurants.

3.2.3 *Business Attractants in Hamilton City*

Respondents were asked to identify some of the key factors that attract business to Hamilton City.

Hamilton's **central location** in terms of access to markets, ports and services was one attractant identified by the majority of respondents (some 70%). Other common factors identified as attractants included:

- Skilled workforce (50%);
- Lifestyle, quality environment for workforce (30%);
- Major centre for population (20%);
- Agriculture centre (20%);
- Proximity to many transport modes (port, rail and road) (30%); and
- Reasonable rentals (20%).

Other responses received by individual respondents include:

- Local market presence;
- Stable local government;
- Cost of living is lower;
- Improving infrastructure; and
- Reduced operation costs.

3.2.4 Business Detractants in Hamilton City

Respondents were also asked to identify features of the current Hamilton City environment which push businesses to leave the City. Key detractant features identified include:

- Moving closer to markets (eg. Auckland), or reducing travel costs to access markets (50%); and
- Centralisation and rationalisation of business activities (40%).

Other responses received by individual respondents include:

- Technology;
- Restrictive District Plan;
- Poor Infrastructure;
- Smaller economies of scale;
- 'Cow Town' Mentality; and
- One respondent also indicated that there was a 'trickle down' effect from centralisation which meant that there was a responding shift for service industries etc out of the area.

3.2.5 Factors to Retain Businesses

Many responses to this question were similar to those given for the question regarding business attractants. Key factors identified that ensure business remains in Hamilton City included:

- Lower costs, better rentals (40%);
- Central location (30%);
- Workforce (education, good supply of human resources) (30%);
- Loyal as they are locals, local ownership (20%)
- General prosperity, infrastructure, network of supporting services (20%).

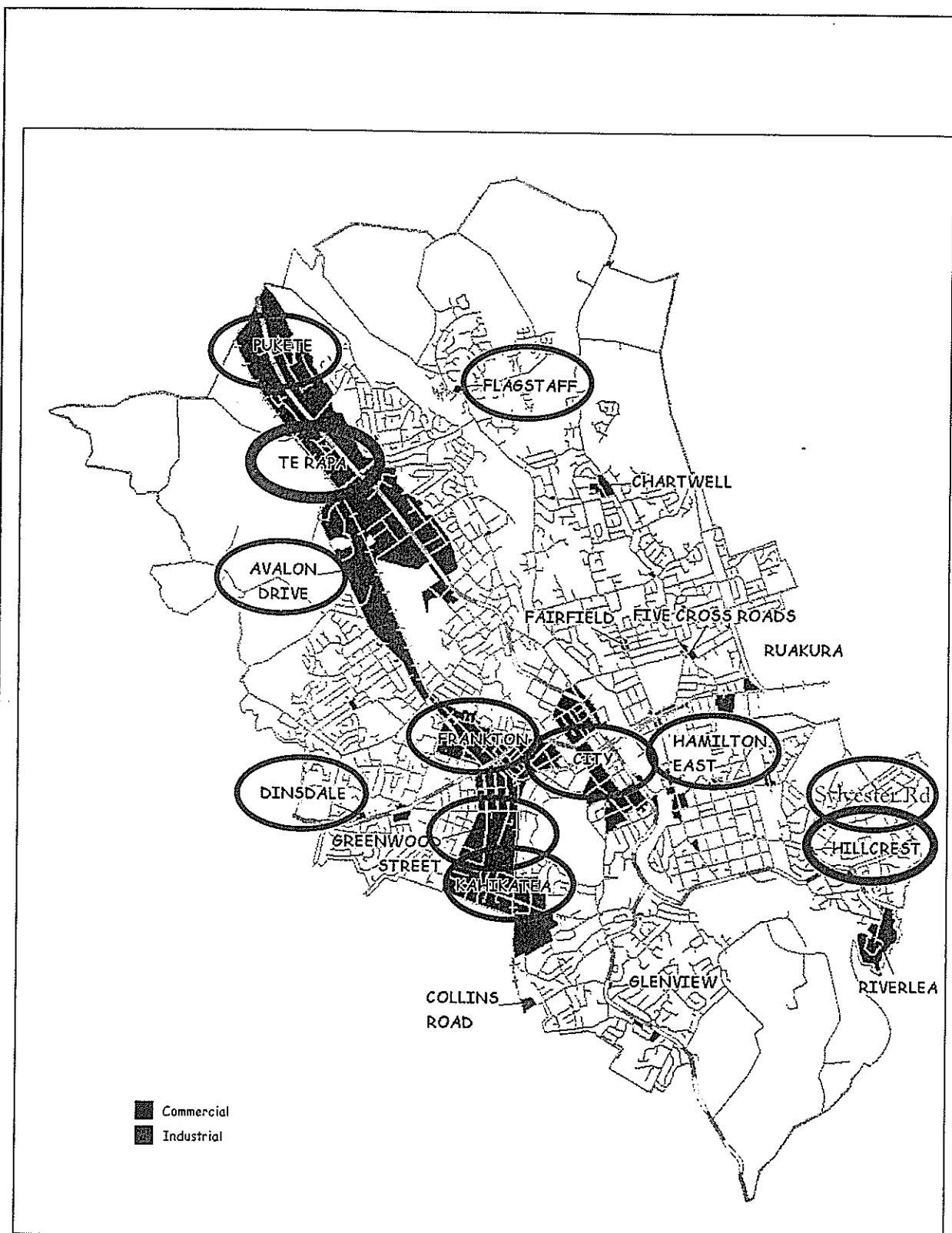
Other individual responses include:

- Available land for development;
- Education good;
- Competition;
- Infrastructure;
- University/ Ag Research;
- Stable Waikato Economy;
- Stable local government with a transparent District Plan process.

Clearly some of these responses are contradictory (eg. in relation to impact of District Plan).

3.3 Commercial and Industrial Property Trends

Approximately half the respondents indicated that at least 50% or more of their business was involved in industrial and commercial property.



3.3.1 Commercial and Industrial Development Trends

Figure 3.5 provides a summary of areas identified where there is current and future demand for commercial and industrial property development. Respondents were asked to differentiate between current and future demand, however only some respondents provided this distinction.

The following provides a summary of key comments made regarding industrial and commercial development demand in Hamilton City, where these areas were identified by two or more respondents:

(a) Te Rapa

- Approximately 60% of respondents identified Te Rapa as a commercial centre with both existing and future development and property demand.
- Type of Demand: Principally industrial. Other industry types identified include retail and bulk retail, manufacturing, and commercial activities.
- Attractant Features: Exposure (e.g. access to SH1 and rail, accessibility and visibility); cheap land; flat land suitable for building with good building sites and appropriate zoning; growing population and site of the new "Supa Centa".

(b) Hillcrest / Silverdale Road

- Approximately 30% of respondents identified Hillcrest and/or Silverdale Road. Both areas were identified both for current and future demand.
- Type of Demand: University, High tech, Life Science, "Innovation Park".
- Attractant Features: Proximity to education facilities.

(c) Pukete

- Two respondents identified Pukete as an area of future and current industrial/commercial property development.
- Type of Demand: Factories; Industrial and Commercial activities.
- Attractant Features: Exposure to SH1 and road/rail access; Available land sites; and close to proposed Supa Centa (1 respondent).

(d) Frankton

- Two respondents identified Frankton as an area of industrial/commercial property demand.
- Type of Demand: Industrial; Bulk retail; Service industry; and Wholesale.
- Attractant Features: Central, Appropriate zoning.

(e) Avalon

- Avalon was also identified as an area of both current and future property demand.

- Type of Demand: Industrial; with future demand in Education.
- Attractant Features: Transport and access, flow on development from Te Rapa.

(f) City Centre

- Two respondents also identified the City Centre as an area of high current commercial property demand.
- Type of Demand: Office, Retail, Hotel, Apartment, Entertainment, Carparking.
- Attractant Features: Central (CBD) and zoning.

3.3.2 *Areas of Industrial/Commercial Oversupply*

Respondents were asked to identify those areas of the City where there was currently an over supply of industrial/commercial developments and to explain what features or attributes they considered made these areas undesirable in the current market. This section was only answered by 3 respondents. Areas identified included:

- Frankton - Older buildings with smaller sites (identified by two respondents);
- Te Rapa - Identified by two respondents. Key features which were identified as making this area undesirable include older buildings with smaller sites (1 respondent) and zoning issues (1 respondent);
- City Centre - (1 respondent) Features identified which make this area undesirable include vacant premises, buildings that require expensive redevelopment, and high costs;
- Riverlea - (1 respondent) Access to this area not as good and people are moving to higher profile sites; and
- Dinsdale - (1 respondent) Filling more slowly than anticipated, slow economy slowing development.

3.3.3 *Property Factors which Attract Business Development*

Respondents were asked to identify the key property factors which attract and retain business property development to the City. Responses to this question were similar to those regarding industrial/commercial activity generally (Part 2 of the questionnaire).

In particular, the following key features were identified:

- Cost, favourable lease and rental conditions (60%);
- Infrastructure and support services, including good access (40%)
- Attractive working and living environment, e.g. proximity to University, public facilities (30%);
- Central location (20%); and
- Available land, large flat sections (20%).

3.3.4 *Property Factors which Push Business Development*

Respondents were asked to identify the key property factors which push business property development from the City. Responses to this question were similar to those regarding industrial/commercial activity generally (Part 2 of the questionnaire).

In particular, the following key features were identified:

- Centralising of businesses (30%); and
- Need to move closer to markets, areas of higher population growth, reduce transport costs (30%).

Restrictive planning provisions and rates and base service costs were identified as two other push factors (by one respondent each).

3.3.5 *Areas for new commercial / industrial development*

Respondents were asked to identify land areas for possible new commercial and industrial development within or beyond the City boundary if demand for commercial and industrial land was to increase significantly over the next 10 – 20 years.

30% of respondents identified the north of Te Rapa as an appropriate area and the following areas were also identified by individual respondents:

- North-east of the City (SH1 bypass);
- Silverdale Road (Innovation Park);
- Pukete North;
- Te Rapa (old Air Force base); and
- Areas with good road and rail access.

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One respondent also indicated agreement with the questionnaire, which identified a new industrial area at the Airport as a possibility, by supporting development of a new industrial area near the Airport.

3.3.6 *Development Plans*

Respondents were asked to identify any commercial / industrial development plans (both within the City and its periphery) which would have potential impacts on Council's infrastructure. In total eight respondents provided answers to this question.¹

1. Development plans in the CBD where parking needs to be addressed;
2. At Hillcrest / Innovation Park (2 respondents);
3. Major development of Te Rapa Dairy Factory site (already undertaken);

¹ However one response indicated 'yes' and the other 'no' with no further commentary.

4. Redevelopment in City (CBD) and new development proposed in the Avalon area. However, all services and infrastructure exist, no increase in demand; and
5. Continuation of Pukete Estate.
6. Te Rapa.
7. University/ Ag Research
8. Airport.

3.3.7 *Other Comments*

The following provides a summary of other comments made with regard to the questionnaire:

1. *"The proposed Plan is a step backwards as value been wiped from properties with zoning regulations (coverage and carpark requirements)"*;
2. Hamilton is generally defensive about its City. There is a need to promote attributes: proximity to population, recreation, warm place to live and good café society;
3. *"The Council are having a big influence on some developments (e.g. Supa Centa) which should proceed without Council intervention."*;
4. That a quick resolution of the District Plan is required as operating under two plans is having a negative impact on industrial growth; and
5. That business development requires support from Council and the associated services to encourage rather than hinder development.



Consultation Record

4 Consultation Record

A total of 11 interviews (including one joint interview with representatives of 2 professional institutes) were undertaken with representatives of key sector development groups operating in Hamilton City. Groups represented included tertiary education, government Ministries, property developers, real estate agents, property managers and valuers.

Fifteen questions were asked during the interviews to obtain further information about the condition of the various sectors of the property and development market. Some participants noted that they could not provide answers to some questions due to lack of involvement in parts of the market. The questions, and responses to them, are outlined below in no particular order.

Question 1 How would you describe the current residential/ commercial/ industrial markets in Hamilton City? Are they constrained by site specific factors or are they experiencing under or over supply?

Market Generally

- *The market is generally static and volatile, subject to retraction due to greater economic whims.*
- *Markets are slow to static. Commercial and industrial markets have been brought back, rates pegged back, rental rates low and has resulted in low property returns. Result is few seeking to invest.*

Residential Market

- *The market has slowed.*
- *There is a shortage of good inner city infill properties. There have been some bad examples developed. There should be more encouragement to 'demolish' older houses, particularly on the fringe of the CBD.*
- *City apartment development is likely to struggle. It has been driven by poorly performing commercial properties.*
- *A lot of recent development has been due to University and Polytech growth and this has now slowed.*
- *There is a surplus of residential rental properties in the market. They are very price sensitive and the majority of tenants are short term only.*
- *Four bedrooms and an ensuite is the current trend for new residential property developments and is a trend that is likely to continue (parents room, two children rooms and 1 for visitors).*
- *There is a residential lifestyle push within the City.*
- *Can't see the carte blanche development of apartments in the City.*
- *The market is flat as there is a lack of population growth and an oversupply of sites/ properties.*

- The market is reasonable and increasing. Possibly there is an oversupply in residential properties. However, City population is increasing, wider economy doing well and these have resulting benefits for the City. Inflation and interest rates low and stable, hence growth will likely be steady rather than quick.

Commercial Market

- There is an oversupply of commercial properties in undesirable locations (lack of public exposure, poor access etc).
- Smaller suburban centre type developments (similar to Flagstaff) are those likely to be popular. The Chartwell Square type of development will not be popular.
- Traditional CBD commercial office uses are moving to fringe area. Rental rates lower and parking requirements of proposed District Plan some of the reasons. Provision should be made for office development in these fringe areas.
- Demand is beginning to occur for commercial properties due to a lack of high quality commercial floorspace.
- Oversupply of office accommodation reducing, (office space) will gradually return to a premium.
- No vacant land in the city centre available for development
- The market is at the bottom however the supply of better properties is drying up, this will eventually drag the rest of the market back up. Will likely find refits of existing spaces will be predominant.
- While there are plenty of buyers that are comfortable with investing in the Hamilton market it is hard to get good stock.

Industrial Market

- There is currently an oversupply of land although the City is well placed for the future.
- There is an oversupply. Large infrastructure projects (expressway etc.) will likely help to improve the market, due to improved access.
- There is a bigger swing towards industrial (rather than commercial). One of the main reasons for this has been due to the fact there has been no recent commercial building developments.
- There is pressure on the northern industrial areas. They are constrained by existing infrastructure and this needs to develop with them to address current problems.

Question 2 Do you think the city's zonings, land area, and infrastructure will be able to address demand for land?

- There is plenty of residential land. On the industrial side the zonings are not the problem. The restrictions within the zones create problems (site coverage, carparking etc) and make the redevelopment of existing properties prohibitive.
- The City should address the issue of transport before addressing the question of zonings as this has an impact on urban form. Zonings should then be developed around desired transport routes.

- There is a need to look at the provision of industrial land, particularly the advantages of looking at land on the City side of the eastern bypass. Land likely to be easily serviceable and a lot of infrastructure is already in place. Only 2-3 landowners to deal with also.
- Council has been behind in infrastructure in the past. Roads should be completed prior or at the same time as developments, particularly when development occurring off uncompleted roads creates problems (and raises costs) to installing services.
- There is enough industrial land to last for the considerable future. While current demand is centred around the north east it is hard to know whether land demand will push as far north to Ngaruawahia. Demand will be heavily impacted on by Waikato D.C policies, potential for 30,000 additional lots to be created (based on 2 lots with 12ha residual). This will have a significant impact on the form and rate of the City's development.
- It is hard to know whether demand will push development north towards Ngaruawahia.
- Short of some types of land, not short of land in general. Hopefully the zonings will become less stringent to encourage growth rather than stifling it. Industrial General land should be allowed to provide for large retail (or rezoned as such).
- Infrastructure is already under pressure in specific locations (e.g. northern end of City)

Question 3 What parts of the City (i.e. residential, commercial, industrial) are experiencing growth and what types of activities within these broad classifications can lead growth?

- Bulk retail activities could lead growth. Driving force is retailers wanting to move out of the centre due to reduced rentals for greater areas.
- The success of the dairy industry will help to raise industrial and commercial expectations. The presence of industry exporters and the innovation technology park could lead growth. The innovation park in particular is potentially brilliant for the area focussing on existing institutions. There is a need to develop this as soon as possible otherwise the City could lose it.
- The casino and stadium developments will have direct impacts and could lead growth by creating jobs in the service industry area. The Claudelands Showgrounds development will also help to facilitate growth.
- Casino will create a move towards redevelopment of the 'older buildings' adjacent to the river, rejuvenating areas that currently appear to be slightly depressed. This may see the demolition of some of these buildings for commercial uses – do not envisage apartments being developed 'carte blanche' in the inner City.
- Promotion of Hamilton as a distribution centre could lead growth.
- Commercial and industrial development needs to lead growth. New industry creates growth. Industry like the innovation park is imperative. The impetus created by the growth of the educational institutions has now settled down.
- North east of the city is experiencing residential growth as the current zoning allows it. Nil growth in the north west as there is no infrastructure and people currently do not have the

option of going to this area. If the supa-centre development goes ahead this will likely create more demand in the northern area resulting in a move out of the CBD which will become more of an entertainment area. Offices won't generally move out of the centre. The supa-centre will create its own suburb.

Question 4 Conversely what parts of the market are languishing and why?

- Industrial growth, due to the lack of promotion of the City as an attractive area for industry.
- Commercial/ retail development as a result of the demand for malls.
- Inner city retailing in difficulty as a result of nationalisation of major chains and their desire to move out of CBD to lower costs. Inner City/ Frankton industrial market is also languishing as existing development patterns are too intense for the current market and are seen as being undesirable. There is also a shortage of players in the general market to achieve rental growth.
- Residential, due to the over supply of properties. Commercial also due to technology advances and associated centralisation of businesses, only just recovering.
- Commercial and industrial development possibly because of infrastructure.
- Possibly residential due to oversupply.
- Growth in the north west due to lack of services. Land values and associated rates one of the biggest restrictions to growth.

Question 5 What could the Council be doing in terms of services, and zoning that could facilitate or stimulate development?

- Inner City commercial development needs to be encouraged. Council should not rezone peripheral areas when the existing CBD etc. remain vacant. Proposed District Plan site coverage, parking and environmental protection overlay place constraints on site development. Promoting Hamilton more is a good initiative. Need to get Hamilton identified/ becoming a destination. Promote its location, lifestyle, land and rent costs etc.
- Finalise the District Plan. The present situation creates uncertainty and a speculative environment. Cost of services is the issue (in terms of certainty).
- Sort out the parking issues with the inner city. The matter is not something that can be undertaken in an ad-hoc manner with individual developments.
- Spend developer contributions on the development of infrastructure they have been taken for.
- Install services in north west and south locations.
- Council is correct in that it is now looking long term issues for and provision of services.
- Public transport has a reasonable impact on development. If the City had an efficient network this could impact on urban form.
- Ensure that services are installed sooner. Provide for forms of sewerage disposal other than reticulation to be considered, accepting that there are servicing options other than reticulation in the traditional manner. Provide flexibility for uses in reserves, recognising their potential to

include commercial developments that could enhance their use (e.g. along the City river walkway, promenade etc.)

- Provide for more commercial land in the eastern areas of the City, possibly additional suburban commercial area.
- Provide more for the trend of big retail outlets on the CBD fringes. Allow for residential developments more in the central areas also.

Question 6 How should the Council intervene, or should the market be allowed to develop "naturally"?

- Develop naturally.
- The level of Council 'intervention' in the City has been very good. BNZ centre has had spin offs for the town centre. Novotel is very good, is successful and also has spin offs. Should continue to selectively intervene.
- Council should provide infrastructure. After that the market should be allowed to undertake development. Council should provide for flexibility. In terms of greenfield sites Council should get structure plans approved and let the market choose between the 3 locations. Obviously infrastructure costs would then be factors the market takes into consideration. Council should promote the City and its attributes – this being the main intervention to attract markets.
- Council has to intervene, particularly in the area of parking which should be provided clear of heavily trafficked routes. Council is somewhat 'hamstrung' by the no subsidy approach of central government, competing against Australia and other countries who provide these for new industry. Hamilton could become more of a transport node than it is currently and this wouldn't take much enticement to develop.
- Has to intervene to an extent in order to look after the community's investment in infrastructure and other services.
- The market should dictate, working within the guidelines of the RMA.
- Council needs to participate. The Hamilton properties type scenario was worthwhile. A significant issue towards attracting businesses to the City is to provide buildings etc for them. Hamilton Properties Ltd was effectively a new business agency for the City and attracted new business.
- Council needs to ensure that it has involvement in many markets as it has an influence greater than many of the smaller participants.
- Council has to exercise some measure of control over market conditions, otherwise the City will end up with imbalances.

Question 7 What actions do you think Council could take to assist businesses to meet their expectations and plans?

- Develop planning provisions with flexibility, carparking requirements etc. It would be good if organisations could come to agreement/partnership with Council.
- It should encourage/promote Hamilton as a centre in which to do business and then regulate as necessary, essentially market the City to businesses. The District Plan should also encourage

development of buildings which face onto the river as this is a natural asset. Council should also look to time the construction of infrastructure ahead of the development. Council therefore needs to develop a good idea of what is planned.

- Establish a division of Council to market the City as marketing is a long-term continuous commitment. Overseas local development agencies help to provide/ identify incentives for investment (suggested reference be made to agency web sites overseas).
- The City is taking a number of steps to support University development. The City is a good place to learn and needs to be recognised as a learning centre. Educational facilities make up a large component of local investment with associated economic returns for the City. Suggested Palmerston North was a good example of self promotion, with welcome to signs identifying it as the 'knowledge city'.
- Within the CBD approaches like rates abatement, inducements and relaxation of some of the controls (parking requirements, levies etc) would help.
- Promote the City globally through sister city arrangements, life science parks like that proposed etc.
- The proposed District Plan is a problem. Needs to have a better focus on the industrial and commercial side. Need some control on residential development, controls should be focussed on protecting/ promoting amenity.
- Such actions are nothing to do with Council. Is up to businesses to make appropriate business decisions.

Question 8 What industries are being attracted to Hamilton. Are there any new industries that could be targeted to develop in the area?

- City should build on existing boat, aluminium and distribution industries. The railway should also be better utilised. Possibly look towards making road transport less attractive to promote rail.
- Life science parks and associated development should be encouraged. Hamilton is a hub. Should also possibly focus on warehousing, distribution centres associated with internet shopping etc.
- Innovation Park, Research & Development specialisation based on proximity to NIWA, Landcare, Ruakura etc. Also software and related electronics fields should also be encouraged (although noted cases where international offers are becoming more attractive).
- High tech industry should be attracted. City is on the right track with the science park, the problem there is with the landholding, would be ideal if the property was Council owned.
- The knowledge economy/ technology, education sectors are definitely growing. The expressway will likely result in Hamilton being perceived closer to Auckland (and this will be an attractant to industry). The agricultural sector in New Zealand is being led by the Waikato – has spin off for Hamilton.
- City has good existing industries. Should encourage the development of the knowledge economy, it is critical to get a good mix of industry. There is room for manufacturing and

distribution as well as for development at the airport, particularly in relation to use as a distribution facility.

- *Entertainment has taken off and has been great for the City. Mystery Creek/ Rugby Stadium are also good examples. Should look for things that will set Hamilton apart, initiatives to foster cultural festivals. Balloon festival is great, possibly look towards Hamilton as a 'leisure centre', 'education centre'*
- *Manufacturing and warehousing should be encouraged. Hamilton is a good distribution area, an inland port has also been mentioned. Aluminium and boats. Industrial land must also be attractive to Auckland businesses due to cheaper land, rates etc. If incentives were provided more industrial land may need to be provided. A survey about 18 months ago identified that there was about 40ha of subdivided industrial land, equivalent to about 10yrs growth.*
- *The City has a good mix. Heavy industry is not really present but it is not really wanted. Industry generally doing pretty well, an inland port could be a good idea.*

Question 9 What are the opportunities and 'competition risks are posed to Hamilton by South Auckland and Tauranga etc?

- *Auckland is competition due to its sheer size. Tauranga could be complementary due to the port and the supporting infrastructure. Hamilton needs to focus on what it is good at. It should look to see how it could complement both cities.*
- *Manukau CC is business friendly and goes out of its way to attract business. It holds seminars to look at ways of encouraging growth and development in the area. In terms of models, it is a good one to look at. Hamilton is by no means the worst, but it could do more. Tauranga is a lifestyle choice but it is not accessible, its infrastructure is not as good, its industrial base is not as well developed, and there are no significant learning institutions. The problem is if Hamilton does not take the leap, opportunities will go elsewhere.*
- *Neither are really competition to Hamilton. The attractant for Tauranga is the beach. Hamilton looks better in terms of its manufacturing and commercial base. South Auckland is growing significantly and is somewhere that the Polytech will look to grow into. Have opened an office in Newmarket with CIT. The Polytech owns the Avalon site and has plans for 40% of students to be based here in 20yrs time with remaining 60% continuing to be based in the City centre.*
- *Both are lower in cost, capital costs lower than in Hamilton. Auckland has a bigger labour market. Tauranga has competition for labour due to its lifestyle. There is a need to make the City more attractive to CEO's of companies. If they are attracted to Hamilton their companies (and labour) will follow.*
- *The University has to have a presence in Tauranga, otherwise someone else would fill the hole – notably Massey.*
- *South Auckland has established businesses etc and people have existing lifestyles. It is not easy to encourage people to relocate from an area which they likely have long affiliations with. The size of the area is also an attractant. Tauranga is competitive due to its climate/ semi-resort*

nature. The port is an advantage although general transport and distribution out of the City is difficult.

- *The sooner the Hamilton to Auckland motorway is constructed the better the position will be for the City to compete.*
- *None. Tauranga only has a small commercial base. Opportunities in Hamilton outweigh competition risks. Land is also cheaper in Hamilton than in both Tauranga and Auckland.*
- *The port of Tauranga and its proximity to Hamilton does not represent a threat, it is a good thing. South Auckland not a worry either.*
- *South Auckland has perceived social problems although it is in a position to do the same as Hamilton. Tauranga is isolated geographically, however its climate is attractive. Hamilton is generally more attractive than south Auckland as land prices, housing etc are more attractive.*

Question 10 Do you have any future plans which could impact on Councils' provision of infrastructure?

- *We have a number of clients wishing to develop in the Peacockes area. Acknowledge impacts on roading but would like to propose low impact sewerage designs rather than reticulation. Growth of City area would possibly have an impact on the existing treatment plan capacity. City should look towards considering possible alternatives.*
- *Innovation park, the university is a partner and signatory for the lease of the land which would then be sublet to the Park company.*
- *Hamilton Bypass, W2 extension, railway bypass in the north-west of the City, and the southern arterial study.*
- *Te Rapa area industrial and commercial subdivisions (already with Council).*
- *The Avalon campus growth has such potential. A plan has been designed to contain runoff within the site wherever possible. Retention ponds have been designed to cater for up to 5ha of hard standing area in 15-20yrs time. The system has been designed to cope with infrastructure to be developed to the north.*
- *Entertainment developments within the CBD where carparking is the main issue.*
- *A new school in the Flagstaff area, the report defining when and where is pending. In terms of education in general, advances in IT may change the face of education. The concept of a school today may be very different to that of a school in the future.*

Question 11 Looking long term does the City have enough area to meet future demand (and will it supply enough property variety to meet market demands)?

- *Yes. It is a matter of whether the City continues to go out or whether Council encourages infill. If the decision is to continue to go 'out', infrastructure networks need careful planning. Also need to determine whether council will encourage the development of satellite commercial areas at the expense of the inner city.*
- *Yes. Rotokauri in the north and needs some growth in the south.*

- The question does not consider the significant residential areas being developed beyond the City boundary. Rules which allow for 400m² sites are asking for social problems. More parking around houses also needed.
- In the shortish term the boundary should be extended on the eastern side. Would like to see the city being able to develop in 3 areas, north east, south and north west. Related activities being promoted by Waikato DC have the potential to impact on City development also.
- Yes, will never be a problem.
- Yes, at least for 50 years. Expect it will take 5-10 years to develop infrastructure at Rotokauri.
- Easily plenty of area for residential growth over the next 20 years. Western growth has been slower and has met the demand over the last 10yrs.

Question 12 Where do you see the ultimate threshold/ boundary of Hamilton's city limits as being?

- Industrial growth will likely extend to Ngaruawahia. Long term the city foot print will be big.
- The Airport will be the southern boundary. There will be no northern boundary. The condition of the land to the west is a physical boundary, and this can also be said (to a lesser extent) for land in the east.
- No ultimate boundary.
- Past Temple View in the south, no further west. Flagstaff is untapped, Rotokauri will be a satellite area with its own commercial centre.
- Horotiu to the north, Rukuhia to the south. East and west will be static.
- The points of access to the city will establish its boundaries e.g. the expressway to the east, north of the dairy factory etc.
- Peat areas may dictate.

Question 13 Is there a need to establish any new residential/industrial/commercial areas. Where could these be, and what factors would influence their location?

- Will be up to Council to determine based on growth patterns. It needs to decide whether the existing CBD commercial area needs to remain viable as satellite areas will reduce its quality. The idea of turning the City around to face the river was great but what has happened to implement it.
- There will likely be pressure to move north east over the next 20 years. Commercial areas are already developed. Industrial areas will be under pressure to develop with the supa centre development – and this will likely restrict any heavier industries from establishing. Growth of the Ruakura areas will also be good, possibly bringing the City form back towards the city centre rather than elongating it.
- Need to look at establishing industrial and commercial land on the east as there is existing demand for such sites. Riverlea Road and Collins Road remain as anomalies. Land east of Ruakura to the expressway will likely be in demand for industrial and commercial uses due to high visibility/ profile and ease of access.

- No.
- Look towards continuing existing types of industrial and commercial areas. Don't need heavy industrial, leave this to Auckland.
- It is inevitable there will be. No industrial areas in the University 1/4 of the City. Should be some provision for this if the City wants 'balanced' growth. Development south should be allowed, both within the City and by Waikato DC.
- Should have new residential areas at Peacockes and Rotokauri. Industrial areas required for Rotokauri and Te Rapa. Commercial areas are better served by having small shopping centre (Flagstaff the example).
- Eastern side should be left residential. Industrial and commercial areas are fragmented enough at the moment.
- Should have more commercial areas in the east. Commercial areas are governed by where the residential areas are. North west seems definitely industrial. Whilst there is growth towards the zoo, the Te Rapa 'strip' will result in a lack of residential or a 'lesser type' of residential area. Northern growth on the eastern side constrained by need for a bridge. Dairy company acts as barrier to northwards growth on the western side of the river.

Question 14 What facilities does the city need to upgrade/put in place/have to make Hamilton an attractive place to invest in, or move to, (e.g. this could be roads, parks, pools, better schools - anything)?

- Schooling has to be addressed in the north east at the moment and in Rotokauri in the future. If the desire is to improve industry on the west, roading needs to improve. Pressure is coming onto develop commercial and industrial on both sides of Avalon Drive.
- The completion of the stadium. Improved theatre, with better performing arts centre. City should look to upgrading 1 to an excellent standard, not deal with 3. Should look to get the Chartwell collection back to Hamilton and display at appropriate location as it is one of the best collections in the southern hemisphere and owned locally. Scotswood promotion at Claudelands ideal, mystery creek too far away and a lot more could be done to improve it even further also. City needs 1-2 major events annually (e.g Balloon Festival).
- Services and more schools to the north.
- Council needs to 'dress up' reserve areas e.g. Lake Rotoroa, as it generally does nothing with these. It should promote more activities (like Balloon Festival) and develop initiatives to promote tourism in the City.
- City development has been quite good over the last 10-15 years. Parks, University arts centre etc are great. However, it is important to ensure that we do not duplicate facilities. The City is generally well positioned.
- Performing arts centre, art museum, Waikato stadium, Claudelands, capitalise on the river bank - create a promenade, not just walks, create activity.
- The city has got a lot already. Stadium will help. perhaps the City does not utilise its existing facilities enough eg. proposed Claudelands development vs Mystery Creek. Could establish

commercial based entertainment facilities. What about a theme park. City should look to think outside the square basing ideas on existing attributes/features.

- *Fast track Claudelands development. The stadium is also good. University and the Polytech are good city facilities.*

Question 15 *What is the level of confidence in your industry? Is local confidence, expectations higher or lower than elsewhere in the country?*

- *High. Government places emphasis on education as it is the foundation of social success. (govt agency)*
- *Battered over the past 5 years. Confidence is hopeful but cautious. Locally more confident than nationally, largely driven by dairy success (developer)*
- *Medium to low, consistent with nation (developer).*
- *Moderate, although uncertain due to government policy. In 3 years there is an upswing in demographic projections. There are now thousands of alternative options for further education which may lead to careers (as opposed to traditional tertiary education).*
- *Confidence reasonably high, lot of potential, needs a push (property consultant).*
- *Confidence is improving.*
- *Confident, higher than elsewhere in the country (valuer).*
- *High, good place to be (real estate rep).*



Summary

5 Summary

5.1 Residential Market and Trends

- The market is generally considered to have stabilised and there is a measure of optimism that it is improving and 'on the way back up'.²
- Greater demand is for new residential properties in the greenfield areas of Rototuna and Sylvester. The demand for greenfield dwellings is expected to be strong in the future.
- There is likely to be an increase in demand for inner city apartments and townhouses and some increase in demand for retirement village type units. There is a general perception that there will be little increase in demand for other market forms.

5.2 Commercial and Industrial Market and Trends

- The market is generally considered to have stabilised and future growth is optimistic, particularly in the agricultural services and wholesale trade sectors.
- Smaller suburban centre types of development are likely to be popular.
- Traditional CBD commercial office uses are moving to CBD fringe areas. Lower costs and fewer restrictions (parking etc.) are considered the main reasons.
- There is plenty of potential investors, however there is a current shortage of top quality properties. Redevelopment of existing spaces will likely result.
- It is considered there is an oversupply of commercial properties in undesirable locations (lack of visibility, poor access etc).
- There is currently an oversupply of industrial land although improved access to the city will likely help to increase demand.

5.3 Attractants in the City for Business

- Central location in terms of access to markets, ports, services, roads and rail.
- Availability of large, flat sections.
- Skilled workforce.
- Lifestyle, attractive working and living environment (as opposed to Auckland)
- Lower rentals costs and operating costs (as opposed to both Auckland and Tauranga)
- Recognition as an agricultural centre.

² It is noted a greater number of respondents to the residential perceptions questionnaire provided negative feedback on the state of the market. This was generally contradicted by the comments made in individual interviews. The reasons for this are thought to be due to the lack of the number of responses made to the survey.

5.4 Detractants in the City for Business

- Current uncertainty about the planning provisions (transitional and proposed plans). Particular concerns were raised about the provisions of the Proposed District Plan in relation to commercial development costs (parking, site coverage provisions etc.).
- City is not currently attractive to CEO's of companies as a place to live.

5.5 Councils Role

- Strong overall support for Council to become more active in promoting Hamilton to businesses and industries. Manukau CC 'proactive' approach identified as a starting point for consideration.
- Acknowledgement that Council should regulate appropriately. Concern however that current planning uncertainty (and the Proposed Plan) acts as a discouraging influence on new development, particular concerns with parking rules.
- Should be encouraging inner city commercial development and developing tourism initiatives.

5.6 City Infrastructure Requirements

- Generally opinion that the City's infrastructure has been developed well over the last ten years, particularly the parks, recent stadium development, performing arts centre etc.
- Claudelands redevelopment and riverbank development were seen as being additional needs for the City.
- Also generally considered that services (roading, wastewater, water etc.) should be programmed to occur prior to or at the same time as development.

5.7 Future Development Plans

- A number of respondents/ interviewees identified plans for commercial developments within the CBD.
- A number of respondents/ interviewees identified commercial/ industrial development plans (existing and future) in the Te Rapa/ Pukete areas.
- A number of participants identified the innovation park at Hillcrest and a desire to develop (and have provided) more commercial properties in the east.
- The Ruakura and Airport areas were also indicated as being utilised for future development.
- A new school in the Flagstaff is currently being identified.
- A number of arterial roading alignments and a southern arterial roading study are planned which will have likely implications for the City's development.

- The Peacockes Road area was identified as an area where there is current desire for residential development to occur.

5.8 Long term City 'footprint'

- A number of factors were identified that could influence the physical size and location of the City. Long term there appears to be a consensus that City boundaries will be extended from their current locations, particularly northern and eastern boundaries.
- Comments were made suggesting that Council should consider the type of urban form it wishes to promote (consolidation or expansion).
- Maximisation of use of existing facilities/ infrastructure (CBD in particular) was suggested by some while a similar number of others suggested development of additional suburban nodes.
- Careful planning and design of infrastructure to cater for growth (particularly expansion) was highlighted.
- Comments also identified that the eventual form of the City (and rate of development) will also be influenced by the current subdivision policies of adjacent authorities, particularly Waikato DC.

MARKET INTENTIONS REPORT: HAMILTON STRATEGY
REVIEW

Report Prepared By: Amelia Linzey *Signed*

Report Prepared By: John Duffy *Signed*

Report Reviewed By: Greg Pollock *Signed*

Appendix A

Residential Questionnaire Form

HAMILTON CITY DEVELOPMENT STRATEGY STUDY RESIDENTIAL MARKET SURVEY

Hamilton City Council is currently undertaking a review of recent trends (2000/2001) in the City's residential market. This review is part of Council's work to ensure that the Hamilton Strategic Plan and Urban Growth Strategy remains up to date and responsive to the residential market demands of the City.

Your agency or business has been sent a copy of this questionnaire because of its involvement in the residential market. We would appreciate it if you could take the time to complete this questionnaire and return it in the pre-paid envelope provided by 21 May 2001.

**ALL RESPONSES WILL BE COMPLETELY CONFIDENTIAL - only aggregated
results will be used or published by Council**

PART 1: GENERAL

P1.01 Which of the following **best** describes your business:

a) Real Estate Agency	<input type="checkbox"/>	d) Property Manager	<input type="checkbox"/>
b) Property Developer	<input type="checkbox"/>	e) Valuer / Surveyor	<input type="checkbox"/>
c) Construction Business / Company	<input type="checkbox"/>	f) Other	<input type="checkbox"/>

P1.02 What proportion of your sales/development market would be within Hamilton City (e.g. compared to Cambridge or the wider region)?

a) Less than 25%	<input type="checkbox"/>	c) 51 - 75 %	<input type="checkbox"/>
b) 25 - 50 %	<input type="checkbox"/>	d) More than 75%	<input type="checkbox"/>

For the purpose of this questionnaire, we are interested in the portion of your business in Hamilton City. In this regard, please answer the remaining questions in terms of Hamilton City only

P1.03 What proportion of your business involves the development/sale of residential property (as opposed to commercial, industrial or rural properties)*

a) Less than 25%	<input type="checkbox"/>	c) 51 - 75 %	<input type="checkbox"/>
b) 25 - 50 %	<input type="checkbox"/>	d) More than 75%	<input type="checkbox"/>

* If more than 25% of your business is in commercial or industrial property we invite you to also complete our Commercial/Industrial Market Survey

P1.04 In terms of **your current** residential business, please tick the proportion involved in the following market sectors?

	a) Nil	b) Less than 25%	c) 25% to 50%	d) 50% to 75%	e) More than 75%
04.1 Residential	<input type="checkbox"/>				
04.2 Rural lifestyle (rural-residential)	<input type="checkbox"/>				
04.3 Mixed business & residential	<input type="checkbox"/>				
04.4 Other	<input type="checkbox"/>				

HAMILTON CITY DEVELOPMENT STRATEGY STUDY RESIDENTIAL MARKET SURVEY

PART 2: MARKET DEMAND

P2.01 On the table below, please indicate what you consider represents the current **demand** for each of the following residential property types in Hamilton City

	No Demand	Slight Demand	Moderate Demand	High Demand
01.1 Newly constructed dwellings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
01.2 Existing dwellings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
01.3 Vacant sites	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

P2.02 On the table below, please indicate what you consider represents the current **demand** for each of the following housing types in Hamilton City

	No Demand	Slight Demand	Moderate Demand	High Demand
02.1 Single dwellings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
02.2 Multi-Unit Dwellings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
02.3 Apartments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
02.4 Townhouses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
02.5 'Retirement village' type units	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
02.6 Rural Lifestyle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
02.7 Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

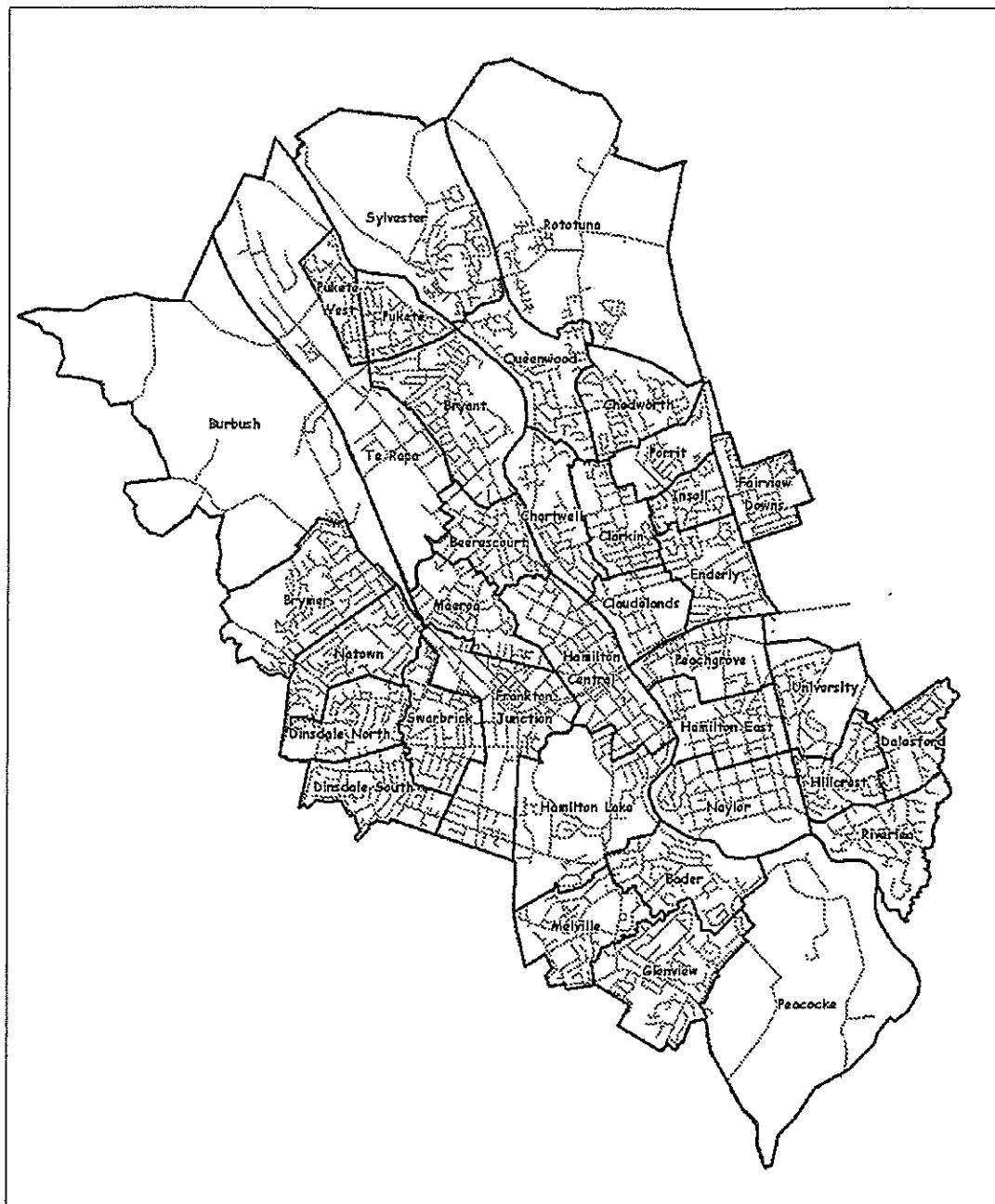
P2.03 In terms of the current market, please indicate below the **demand** for residential properties (excluding vacant land sites) in the following price brackets...

	No Demand	Slight Demand	Moderate Demand	High Demand
03.1 Less than \$100,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
03.2 \$100,000 - \$150,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
03.3 \$150,000 - \$175,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
03.4 \$175,000 - \$200,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
03.5 \$200,000 - \$250,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
03.6 \$250,000 - \$300,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
03.7 \$300,000 - \$350,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
03.8 \$350,000 - \$400,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
03.9 Greater than \$400,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

HAMILTON CITY DEVELOPMENT STRATEGY STUDY RESIDENTIAL MARKET SURVEY

PART 3: GEOGRAPHIC DEMAND

P3.01 On the map below, please circle those areas/suburbs where 'residential property demand' is currently high.



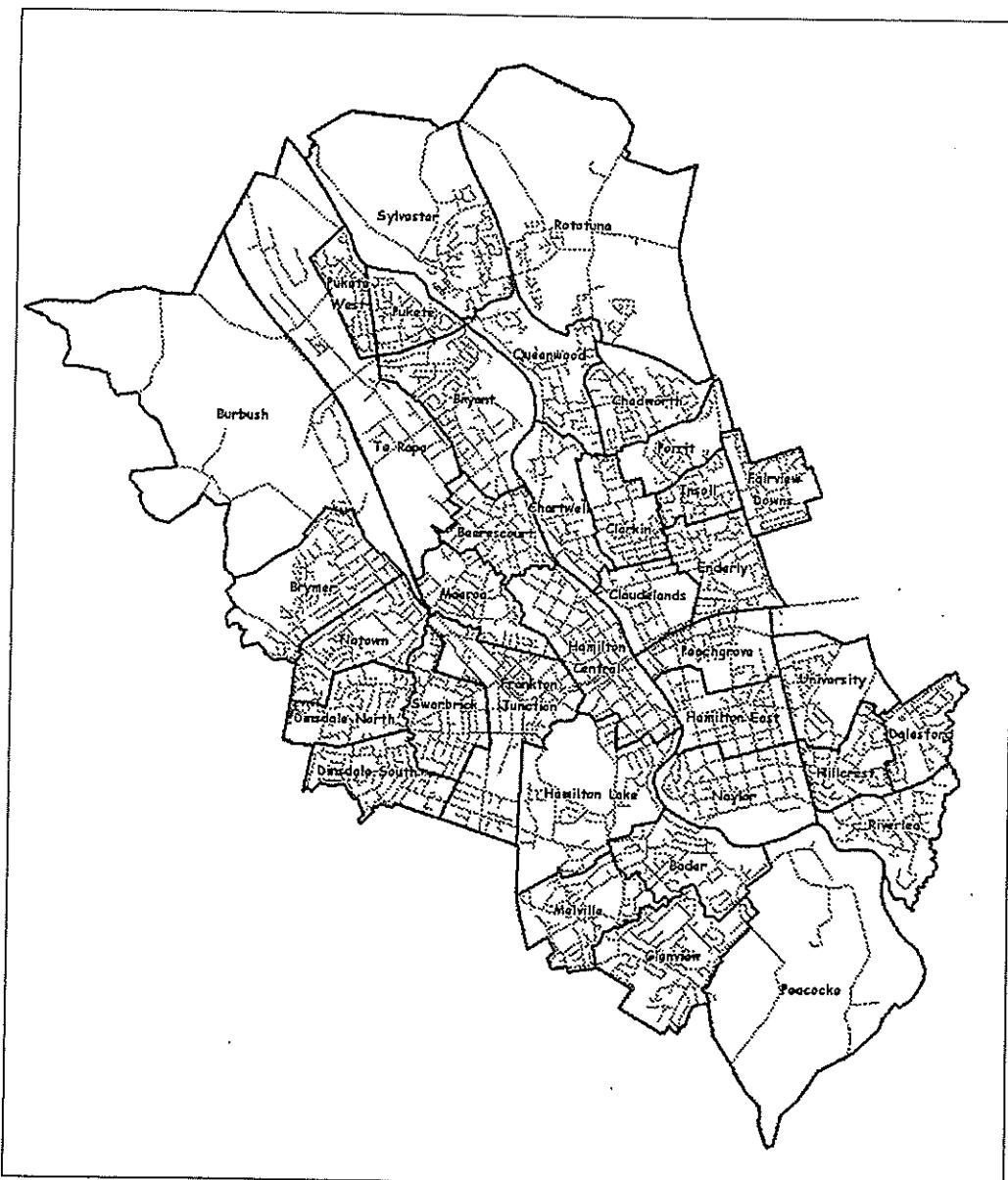
P3.02 For each area you have identified above, please indicate below the general characteristics of this residential demand (e.g. housing type: new or existing dwellings, multi-unit dwellings, apartments, retirement villages, and 'demand segment': e.g. families, couples, single occupants; elderly).

Area (name from map)	Housing Type	Demand Segment
<u>Rototuna</u>	<i>New single dwellings</i> <i>New Retirement Villages</i>	<i>Families</i> <i>Elderly</i>

HAMILTON CITY DEVELOPMENT STRATEGY STUDY RESIDENTIAL MARKET SURVEY

Area (name from map)	Housing Type	Demand Segment

P3.02 In your experience, are there any areas / suburbs where there is an oversupply of housing or where the market is currently stagnant or depressed? Please circle and label with an 'A' those areas/suburbs where there is an oversupply. For those area/suburbs that are currently stagnant/depressed, please circle and label with a 'B'.



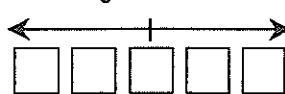
**HAMILTON CITY DEVELOPMENT STRATEGY STUDY
RESIDENTIAL MARKET SURVEY**

P3.03 Why do you think this is occurring?

Area (name from map)	Features/Aspects which contribute to a lack of demand in the current market

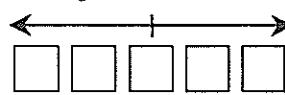
PART 4: MARKET TRENDS

P4.01 In your opinion, which of the following best describes the current (2000/01) residential property market in Hamilton City?



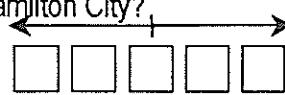
- a) Depressed
- b) Flat / Stagnant
- c) Stable
- d) Confident
- e) Booming

P4.02 In your opinion, which of the following best describes the residential property market five years ago in Hamilton City?



- a) Depressed
- b) Flat / Stagnant
- c) Stable
- d) Confident
- e) Booming

P4.03 In your opinion, which of the following best describes how the residential property market will be in the future (5 years time) in Hamilton City?



- a) Depressed
- b) Flat / Stagnant
- c) Stable
- d) Confident
- e) Booming

HAMILTON CITY DEVELOPMENT STRATEGY STUDY
RESIDENTIAL MARKET SURVEY

P4.04 Please indicate below where you expect to see changes to residential property demand over the next five years for the following 'market types'.

		Significant Decline	Decline	No Change	Increase	Significant Increase
04.1	New 'greenfield' dwellings	<input type="checkbox"/>				
04.2	New 'infill' dwellings	<input type="checkbox"/>				
04.3	Existing dwellings	<input type="checkbox"/>				
04.4	Bare sites / vacant sites	<input type="checkbox"/>				

P4.05 Please indicate below where you expect to see changes to residential property demand over the next five years for the following 'market forms'

		Significant Decline	Decline	No Change	Increase	Significant Increase
05.1	Single dwellings	<input type="checkbox"/>				
05.2	Multi-Unit Dwellings	<input type="checkbox"/>				
05.3	Inner City Apartments	<input type="checkbox"/>				
05.4	Townhouses	<input type="checkbox"/>				
05.5	'Retirement village' type units	<input type="checkbox"/>				
05.6	Rural Lifestyle	<input type="checkbox"/>				
05.7	Other (specify)	<input type="checkbox"/>				
.....						

P4.06 In terms of the future residential property market, please indicate below where you consider demand will be in the following price brackets (excluding vacant land property)

		No Demand	Slight Demand	Moderate Demand	High Demand
06.1	Less than \$100,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
06.2	\$100,000 - \$150,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
06.3	\$150,000 - \$175,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
06.4	\$175,000 - \$200,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
06.5	\$200,000 - \$250,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
06.6	\$250,000 - \$300,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
06.7	\$300,000 - \$350,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
06.8	\$350,000 - \$400,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

HAMILTON CITY DEVELOPMENT STRATEGY STUDY RESIDENTIAL MARKET SURVEY

06.9 Greater than \$400,000

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------	--------------------------

P4.07 Does your organisation have any significant residential development plans (both within the City and its periphery) that could have potential capacity impacts on existing Council infrastructure (e.g roads, water mains, sewerage pipelines etc)? If 'yes', where and when will these likely occur?

Note: The purpose of this question is to flag to Council any potentially significant developments to enable it to plan for and implement any necessary Council infrastructure expenditure. If you answer yes to this question we would like to meet with you to discuss these plans and note that all such discussions are totally confidential.

P4.08 Are there any other general comments you would like to make regarding the Hamilton residential property market (please feel free to add additional sheets)?

Thank you very much for taking the time to complete this questionnaire. We would appreciate your response by 21 May 2001.

If you would like any further information about this survey or the Hamilton Strategic Plan please contact either Mr Mark Brougham, Corporate Planner Hamilton City Council (ph 838 6597) or John Duffy, Beca Planning Hamilton (phone 838 3828/ e-mail jduffy@beca.co.nz).

We are also interested in undertaking face-to-face interviews to discuss in more detail the residential property market trends and constraints for development in Hamilton City. We will be contacting possible participants for interviews over the next few weeks. If you are interested in being involved in these confidential discussions please contact John Duffy (contact details above)

Appendix B

Residential Market Confidence

Appendix B

Figure 1: Current Confidence in Residential Market

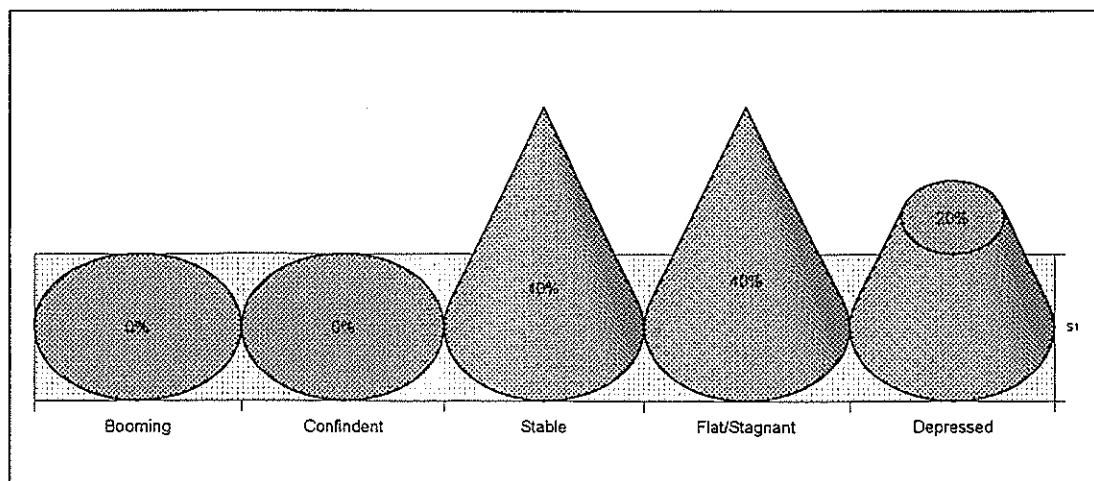


Figure 2: Confidence in Residential Market 5 Years Ago

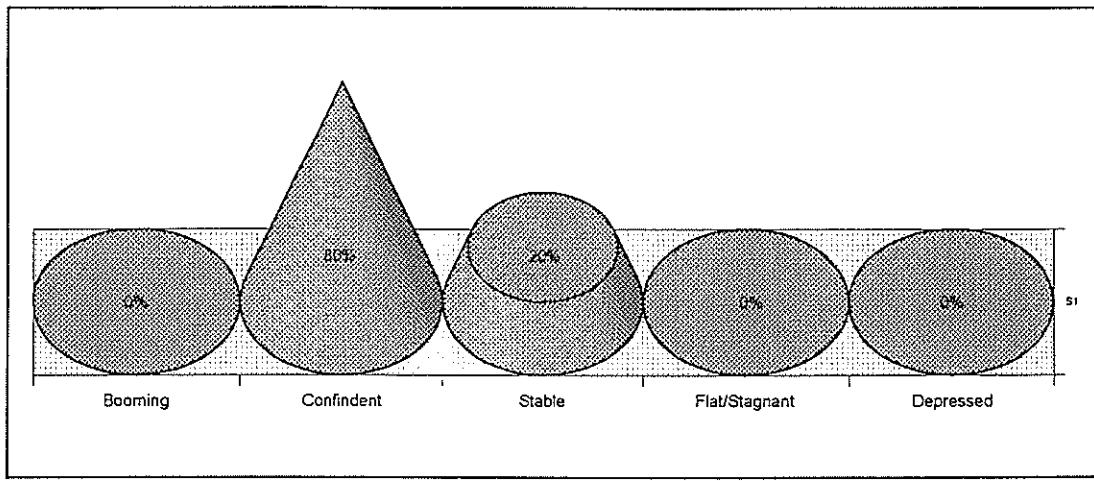
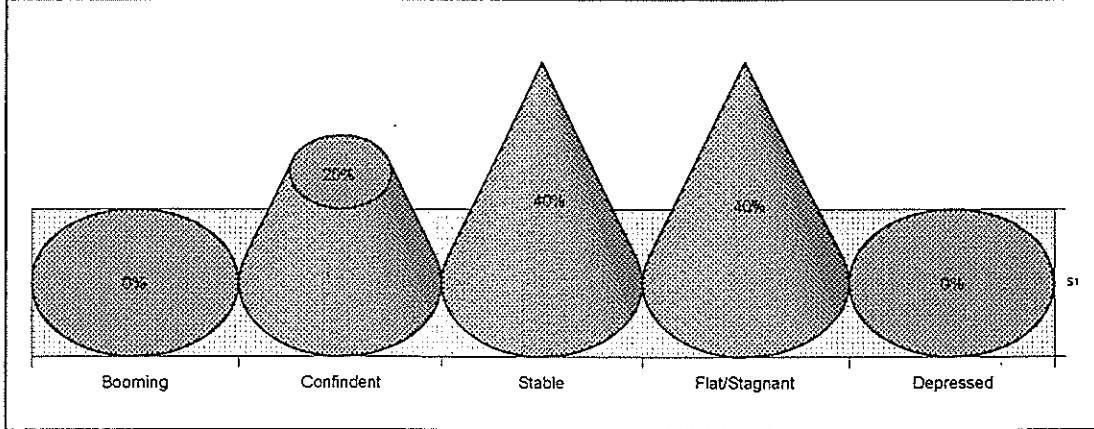


Figure 3: Anticipated confidence in Residential Market (future 5 years)



Appendix C

Industrial / Commercial Questionnaire Form

HAMILTON CITY DEVELOPMENT STRATEGY STUDY COMMERCIAL / INDUSTRIAL PERCEPTIONS SURVEY

Hamilton City Council is currently undertaking a review of recent trends (2000/2001) in the City's commercial and industrial market. This review is part of Council's work to ensure that the Hamilton Strategic Plan and Urban Growth Strategy remains up to date and responsive to business demands in the City. In particular, the purpose of this questionnaire is to gain a better understanding of current business trends in Hamilton City and how these trends may change in the future. We are also particularly interested in getting feedback on what Council can do enhance business opportunities.

Your agency or business has been sent a copy of this questionnaire because of its involvement in the commercial / industrial market. We would appreciate it if you could take the time (approximately 10 minutes) to complete this questionnaire and return it in the pre-paid envelope provided by **21 May 2001**.

*ALL RESPONSES WILL BE COMPLETELY CONFIDENTIAL - only aggregated
results will be used or published by Council*

PART 1: GENERAL

P1.01 Which of the following **best** describes your business:

a) Real Estate Agency	<input type="checkbox"/>	e) Service Provider (e.g. power)	<input type="checkbox"/>
b) Property Developer	<input type="checkbox"/>	f) Industry Manager	<input type="checkbox"/>
c) Construction Business / Company	<input type="checkbox"/>	g) Industry Representative (specify)	<input type="checkbox"/>
d) Property Manager	<input type="checkbox"/>	h) Other (specify)	<input type="checkbox"/>

P1.02 What proportion of your business operation would be **within Hamilton City** (e.g. compared to Cambridge or the wider region)?

a) Less than 25%	<input type="checkbox"/>	c) 51 - 75 %	<input type="checkbox"/>
b) 25 - 50 %	<input type="checkbox"/>	d) More than 75%	<input type="checkbox"/>

For the purpose of this questionnaire, we are interested in the portion of your business in Hamilton City. In this regard, please answer the remaining questions in terms of Hamilton City only.

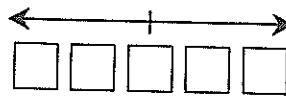
The remainder of the questionnaire has been divided into particular segments relating to commercial/industrial business activity and more specifically to property. We recognise that different businesses will have specialised areas of interest and may only wish to complete some sections of the questionnaire.

PART 2: INDUSTRY TRENDS

Business is essential to the social and economic well-being of the Hamilton City community, both in terms of employment and in terms of providing goods and services. In 2000, Statistics New Zealand estimated that around 14% of the working population were employed in Manufacturing, with a similar proportion in Retail Trade. Other major industries for employment in Hamilton City include Property and Business Services, Health and Community Services and Construction. These industries also dominate in terms of the number of businesses operating in Hamilton City (all in excess of 500 businesses).

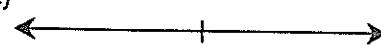
HAMILTON CITY DEVELOPMENT STRATEGY STUDY COMMERCIAL / INDUSTRIAL PERCEPTIONS SURVEY

P2.01 There are currently around 9,200 business in Hamilton City (2.9% of all New Zealand Business). In your opinion, which of the following best describes **current** (2000/01) overall business activity in Hamilton City?



- a) Depressed
- b) Flat / Stagnant
- c) Stable
- d) Confident
- e) Booming

P2.02 In terms of business activity for industry sectors, please indicate which of the following best describes **current business activity** in Hamilton City



P2.02... Current Industry Sector Growth

02.A Agriculture Services, Forestry and Fishing	<input type="checkbox"/>				
02.B Mining	<input type="checkbox"/>				
02.C Manufacturing	<input type="checkbox"/>				
02.D Electricity, Gas and Water Supply	<input type="checkbox"/>				
02.E Construction	<input type="checkbox"/>				
02.F Wholesale Trade	<input type="checkbox"/>				
02.G Retail Trade	<input type="checkbox"/>				
02.H Accommodation, Café, Restaurants	<input type="checkbox"/>				
02.I Transport and Storage	<input type="checkbox"/>				
02.J Communication Services	<input type="checkbox"/>				
02.K Finance and Insurance	<input type="checkbox"/>				
02.L Property and Business Services	<input type="checkbox"/>				
02.M Government Administration and Defence	<input type="checkbox"/>				
02.N Education	<input type="checkbox"/>				
02.O Health and Community Services	<input type="checkbox"/>				
02.P Cultural and Recreation Services	<input type="checkbox"/>				
02.Q Personal and Other Services	<input type="checkbox"/>				

**HAMILTON CITY DEVELOPMENT STRATEGY STUDY
COMMERCIAL / INDUSTRIAL PERCEPTIONS SURVEY**

P2.02 In terms of business activity for industry sectors, please indicate which of the following best describes **demand for growth in the following industry sectors over the next five years** in Hamilton City

P2.02... Future Industry Sector Growth

02.A Agriculture Services, Forestry and Fishing
 02.B Mining
 02.C Manufacturing
 02.D Electricity, Gas and Water Supply
 02.E Construction
 02.F Wholesale Trade
 02.G Retail Trade
 02.H Accommodation, Café, Restaurants
 02.I Transport and Storage
 02.J Communication Services
 02.K Finance and Insurance
 02.L Property and Business Services
 02.M Government Administration and Defence
 02.N Education
 02.O Health and Community Services
 02.P Cultural and Recreation Services
 02.Q Personal and Other Services

→				
a) Significant Decline	b) Decline	c) No Change	d) Increase	e) Significant Increase
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
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<input type="checkbox"/>				

P2.03 On average, each year approximately 1,250 new businesses are established in Hamilton City. While the majority of these are new businesses, around 55 businesses move into the City from elsewhere in New Zealand. In your opinion, what are some of the key factors which **attract businesses** to the City?

HAMILTON CITY DEVELOPMENT STRATEGY STUDY COMMERCIAL / INDUSTRIAL PERCEPTIONS SURVEY

P2.04 While there are around 55 businesses moving into the City from elsewhere in New Zealand each year, around 60 businesses move out. In your opinion, what are some of the key factors which **push businesses to leave the City**?

P2.05 In your opinion, are what are some of the key factors which **keep businesses in the City**?

PART 3: CURRENT COMMERCIAL AND INDUSTRIAL PROPERTY TRENDS

P3.01 What proportion of your business relates to sales, development or property management for industrial or commercial property (as opposed to residential or rural properties)*

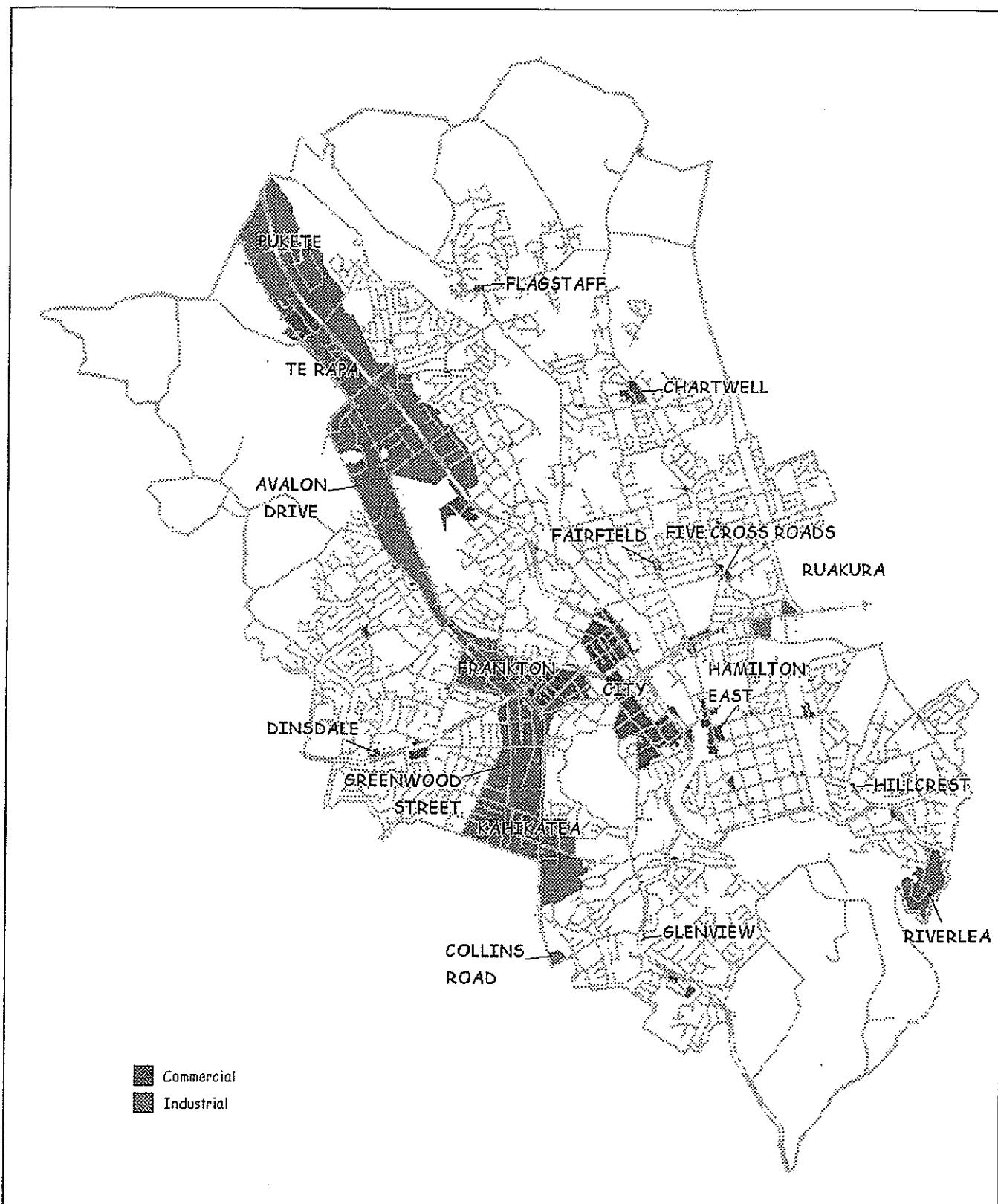
a) Less than 25%	<input type="checkbox"/>	c) 51 - 75%	<input type="checkbox"/>
b) 25 - 50%	<input type="checkbox"/>	d) More than 75%	<input type="checkbox"/>

* If more than 25% of your business is in residential property we invite you to also complete our Residential Market Survey

Since 1996 there has been a significant increase in the value of building consents sought for non-residential buildings. For example, to the year ending December 2000 an estimated \$96 million of building consents had been sought for non-residential properties, compared to \$66 million to December 1996 (this is a 45% increase). We are interested in gaining from you some feedback on the location features for current market demand for **new commercial / industrial property** and what features may influence trends for new commercial/industrial property may be over the next 5 and 10 years.

HAMILTON CITY DEVELOPMENT STRATEGY STUDY
COMMERCIAL / INDUSTRIAL PERCEPTIONS SURVEY

P3.02 On the map below, please identify those areas where you consider there is current and future demand for new commercial / industrial developments. Please circle and label with an 'A' those areas where there is current demand. For those areas that there will likely be future demand for please circle and label with a 'B'.



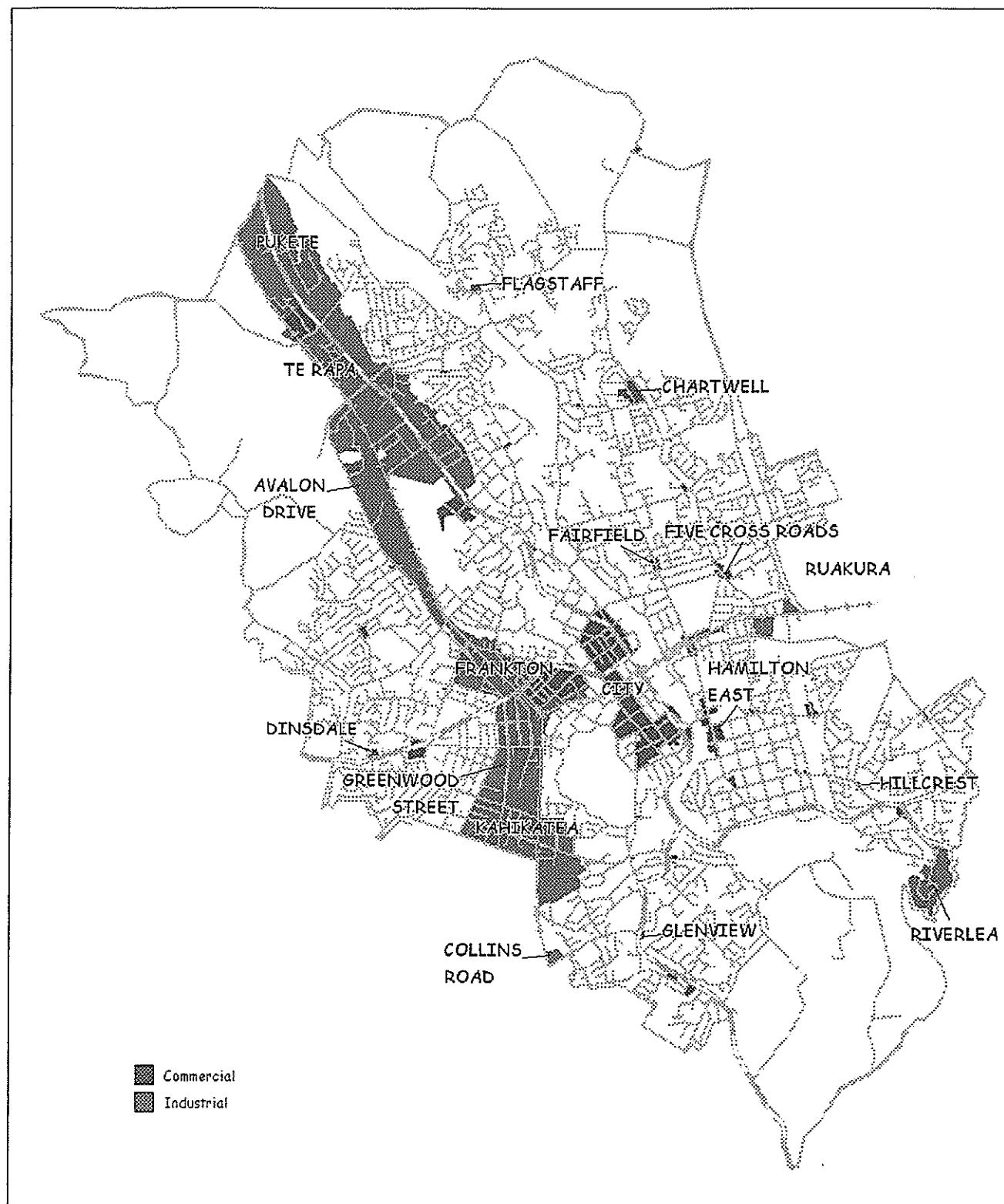
HAMILTON CITY DEVELOPMENT STRATEGY STUDY
COMMERCIAL / INDUSTRIAL PERCEPTIONS SURVEY

P3.02.01 For each area you have identified above, please indicate below the type of demand (e.g. hotels, shops, factories) and provide any comments on the features or characteristics that make this area attractive to the market (e.g. cost, lot sizes, adjacent land uses).

Area (name from map, e.g. Te Rapa)	Type of Demand	Features that make this area attractive to the market

HAMILTON CITY DEVELOPMENT STRATEGY STUDY
COMMERCIAL / INDUSTRIAL PERCEPTIONS SURVEY

P3.04 In your experience, are there any areas where there is an over supply of available industrial/commercial developments? Please circle those areas where this is currently the case



**HAMILTON CITY DEVELOPMENT STRATEGY STUDY
COMMERCIAL / INDUSTRIAL PERCEPTIONS SURVEY**

P3.04.01 Why do you think this is occurring?

Area - by name e.g. Dinsdale	Features/Aspects which make this area undesirable in the current market (e.g. cost, lot sizes, adjacent land uses)

P3.05 In terms of new business moving into the City, what do you consider are some of the key **property** factors which **attract and retain** businesses to the City (both now and in the future)?

P3.06 In terms of business moving out the City, what do you consider are some of the key **property** factors which **push** businesses from the City (both now and in the future)?

P3.07 If demand for commercial/ industrial land increases significantly over the next 10-20 years what areas within or beyond the present City boundary do you consider would be preferred for new development. Please list possible areas for such development on the table below.

Possible new Commercial Area e.g. north eastern corner of the City, in the vicinity of Gordonton and Thomas Roads.	Possible New Industrial Area e.g. area near the Airport

**HAMILTON CITY DEVELOPMENT STRATEGY STUDY
COMMERCIAL / INDUSTRIAL PERCEPTIONS SURVEY**

3.08 Does your organisation have any significant commercial / industrial development plans (both within the City and its periphery) that could have potential capacity impacts on existing Council infrastructure (e.g roads, water mains, sewerage pipelines etc)? If 'yes', where and when will these likely occur?

Note: The purpose of this question is to flag to Council any potentially significant developments to enable it to plan for and implement any necessary Council infrastructure expenditure. If you answer yes to this question we would like to meet with you to discuss these plans and note that all such discussions are totally confidential.

3.09 Are there any other general comments you would like to make regarding the commercial and industrial market in Hamilton and the constraints and opportunities for growth (please feel free to add additional sheets)?

Thank you very much for taking the time to complete this questionnaire. We would appreciate your response by 21 May 2001.

If you would like any further information about this survey or the Hamilton Strategic Plan please contact either Mr Mark Brougham, Corporate Planner, Hamilton City Council (ph 838 6597) or John Duffy, Beca Planning Hamilton (phone 838 3828/ e-mail jduffy@beca.co.nz.)

We are also interested in undertaking face-to-face interviews to discuss in more detail the market trends and constraints for development in Hamilton City. We will be contacting possible participants for interviews over the

HAMILTON CITY DEVELOPMENT STRATEGY STUDY COMMERCIAL / INDUSTRIAL PERCEPTIONS SURVEY

next few weeks. If you are interested in being involved in these confidential discussions please contact John Duffy (contact details above).

Appendix D

Market Confidence by Industry

Appendix D
Market Confidence by Industry

Industry Sector	Time Period	Booming	Confident	Stable	Flat/Stagnant	Depressed
Agriculture Services	Current	17%	67%	0%	17%	0%
	Future	29%	29%	29%	14%	0%
	Change	<i>Overall decline in market confidence (increased stable)</i>				
Mining	Current	0%	0%	40%	60%	0%
	Future	0%	0%	40%	60%	0%
	Change	<i>No Change</i>				
Manufacturing	Current	0%	14%	71%	14%	0%
	Future	0%	57%	43%	0%	0%
	Change	<i>Increased confidence</i>				
Electricity, Gas and Water	Current	0%	43%	57%	0%	0%
	Future	0%	57%	29%	14%	0%
	Change	<i>No Change</i>				
Construction	Current	0%	0%	57%	43%	0%
	Future	0%	29%	57%	14%	0%
	Change	<i>Increased confidence</i>				
Wholesale Trade	Current	0%	83%	17%	0%	0%
	Future	0%	83%	17%	0%	0%
	Change	<i>No Change</i>				
Retail Trade	Current	0%	83%	17%	0%	0%
	Future	0%	29%	71%	0%	0%
	Change	<i>Overall decline in market confidence (increased stable)</i>				
Accommodation, Café, Restaurants	Current	0%	71%	29%	0%	0%
	Future	0%	57%	29%	14%	0%
	Change	<i>Decline in market confidence</i>				
Transport and Storage	Current	0%	0%	83%	17%	0%
	Future	0%	33%	33%	33%	0%
	Change	<i>Slight increased confidence</i>				
Communication Services	Current	0%	85%	15%	0%	0%
	Future	0%	57%	29%	14%	0%
	Change	<i>Decline in market confidence</i>				
Finance & Insurance	Current	0%	17%	67%	17%	0%
	Future	0%	17%	83%	0%	0%
	Change	<i>Slight increased confidence</i>				
Property & Business Services	Current	0%	0%	57%	43%	0%
	Future	0%	0%	86%	14%	0%
	Change	<i>Slight increased confidence (higher proportion stable market)</i>				
Govt. Admin. & Defence	Current	0%	0%	33%	50%	17%
	Future	0%	0%	67%	17%	17%
	Change	<i>Anticipated increase in market conditions</i>				
Education	Current	0%	13%	75%	13%	0%
	Future	0%	13%	75%	13%	0%
	Change	<i>No Change</i>				

Industry Sector	Time Period	Booming	Confident	Stable	Flat/Stagnant	Depressed
Health & Community Services	Current	17%	0%	67%	17%	0%
	Future	10%	29%	57%	14%	0%
	Change	<i>Minor decrease in market confidence (little to no change)</i>				
Cultural & Recreation Services	Current	0%	0%	100%	0%	0%
	Future	0%	50%	50%	0%	0%
	Change	<i>Increased market confidence</i>				
Personal & Other Services	Current	0%	17%	67%	17%	0%
	Future	0%	17%	83%	0%	0%
	Change	<i>Slight increase in market confidence (increased stable)</i>				

