



Notice is hereby given that an Ordinary Meeting of Southland District Council will be held on:

Date: **Wednesday, 22 July 2020**
Time: **9am**
Meeting Room: **Council Chamber**
Venue: **15 Forth Street**
Invercargill

Council Agenda

OPEN

MEMBERSHIP

Mayor	Mayor Gary Tong
Deputy Mayor	Ebel Kremer
Councillors	Don Byars
	John Douglas
	Paul Duffy
	Bruce Ford
	Darren Frazer
	George Harpur
	Julie Keast
	Christine Menzies
	Karyn Owen
	Margie Ruddenklau
	Rob Scott

IN ATTENDANCE

Chief Executive	Steve Ruru
Committee Advisor	Fiona Dunlop

Contact Telephone: 0800 732 732
Postal Address: PO Box 903, Invercargill 9840
Email: emailsdc@southlanddc.govt.nz
Website: www.southlanddc.govt.nz

Full agendas are available on Council's Website
www.southlanddc.govt.nz

Note: The reports contained within this agenda are for consideration and should not be construed as Council policy unless and until adopted. Should Members require further information relating to any reports, please contact the relevant manager, Chairperson or Deputy Chairperson.

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1 Apologies

At the close of the agenda no apologies had been received.

2 Leave of absence

At the close of the agenda no requests for leave of absence had been received.

3 Conflict of Interest

Councillors are reminded of the need to be vigilant to stand aside from decision-making when a conflict arises between their role as a councillor and any private or other external interest they might have.

4 Public Forum

Notification to speak is required by 5pm at least two days before the meeting. Further information is available on www.southlanddc.govt.nz or phoning 0800 732 732.

5 Extraordinary/Urgent Items

To consider, and if thought fit, to pass a resolution to permit the Council to consider any further items which do not appear on the Agenda of this meeting and/or the meeting to be held with the public excluded.

Such resolution is required to be made pursuant to Section 46A(7) of the Local Government Official Information and Meetings Act 1987, and the Chairperson must advise:

- (i) The reason why the item was not on the Agenda, and
- (ii) The reason why the discussion of this item cannot be delayed until a subsequent meeting.

Section 46A(7A) of the Local Government Official Information and Meetings Act 1987 (as amended) states:

"Where an item is not on the agenda for a meeting,-

- (a) that item may be discussed at that meeting if-
 - (i) that item is a minor matter relating to the general business of the local authority; and
 - (ii) the presiding member explains at the beginning of the meeting, at a time when it is open to the public, that the item will be discussed at the meeting; but
- (b) no resolution, decision or recommendation may be made in respect of that item except to refer that item to a subsequent meeting of the local authority for further discussion."

6 Confirmation of Council Minutes

6.1 Meeting minutes of Council, 23 June 2020

6.2 Meeting minutes of Extraordinary Council, 08 July 2020

Southland District Rates Affordability Assessment

Record No: R/20/7/27277
Author: Nicole Taylor, Finance Development Co-ordinator
Approved by: Anne Robson, Chief Financial Officer

☐ Decision ☒ Recommendation ☐ Information

Purpose

- 1 This report outlines the work that has been done on developing information to provide a baseline picture of rates affordability for households and industry/business across Southland District in 2019/2020.
- 2 A copy of the full rates affordability report is included in Attachment A.
- 3 This analysis can be used by Council when reviewing the impact of its funding and rating decisions as part of the Revenue and Financing Policy and also in the review of the Rates Remission and Postponement Policy and development of the 2021 Long Term Plan.
- 4 The report also provides a high level overview of the methods which Council could use to address any aggregate and distributional rates affordability issues.
- 5 Staff are seeking guidance from Council about the findings of the report and what action, if any, is needed ahead of the review of related policies and plans.

Executive Summary

- 6 Affordability of Council services (and subsequently rates) has been identified as a key challenge for Council. With the cost of replacing ageing infrastructure and meeting higher environmental standards, the ability of the District's relatively small and geographically dispersed population to pay for rates is an important consideration.
- 7 While the Local Government Act 2002 does not explicitly require that Council measure rates affordability, the financial management obligations within the act provide the framework for considering affordability in relation to financial prudence, financial sustainability and balancing financial needs with financial capacity (sections 100 - 102).
- 8 As one of the key sources of Council's revenue (making up 66% of revenue overall), rates are currently a significant determinant of Council's financial capacity. A community must be able to be afford rates now and in the future in order to sustain the services being provided and ultimately contribute to the wellbeing of the community.
- 9 As such, considering rates affordability is central to monitoring the community's ability to pay and hence assessing the financial capacity of Council to meet its financial needs and operate in a financially prudent and sustainable manner.
- 10 A separate assessment of rates affordability (Attachment A) has been prepared which uses a range of data to indicate the circumstances under which the ability to pay rates is more likely to be an issue and where these issues are more likely to exist in the district.
- 11 This information can assist elected members in determining whether the approach to funding/rating in Southland District is appropriate as part of the requirements of section 101(3)(b) of the Local Government Act. This section requires Council to consider the impact

that any proposed allocation of revenue liability has on the current and future community wellbeing when deciding how to fund activities as part of the Revenue and Financing Policy.

- 12 The attached assessment builds on the initial analysis included in the 2018-2028 Financial Strategy which looked at the level of Southland District Council (SDC) rates compared to household income for residential properties in townships. It identified two townships where rates were greater than 5% of household income (Ohai/ Nightcaps) and several other townships with rates nearing 5% of household income. The strategy noted that there was a need to expand on the analysis to include regional council rates and non-residential rates.
- 13 As a result, regional council rates for Environment Southland (ES) have been included in the analysis and combined with rates for SDC to determine total rates paid by properties in Southland District and provide a fuller picture of the rates burden across the district.
- 14 The analysis has been expanded to include all property landuse types and examine affordability at the household, community and industry/business level. It also introduces additional social/economic wellbeing indicators.
- 15 A number of data sources and assumptions have been used in preparing the data and this is discussed in more detail later in this report as well as in the data source/methodology section of Attachment A. The analysis can be updated as inputs change including new income data and updated activity budgets or rate revenue forecasts. This enables Council to review the assessment as rating related policies and plans are developed.
- 16 The assessment of rates affordability has been considered at two levels:
 - aggregate affordability - at council level where the focus is on the level of rating overall resulting from council's budgeting and funding decisions. The assessment looks at the overall level of rating in Southland for properties that have dwellings (including residential, lifestyle and farming properties) and also compares how total rates sit in relation to regional Gross Domestic Product (GDP); and
 - distributional affordability – at the ratepayer or groups of ratepayer level where the focus is on the level of rates for individuals or groups in the community resulting from council's decisions about how rates will be shared out. The assessment looks at household rating between different areas of Southland, different landuse types as well as looking at industry/business rating in relation to industry GDP.
- 17 The key findings from the assessment (Attachment A) show that household rates are below the 5% threshold set by Council at the aggregate affordability level, however at the distributional level, there are rates affordability issues for different groups of ratepayers.
- 18 At an aggregate affordability level (council overall):
 - households overall - median household rates (ES and SDC) are 3.95% of median household income (below the 5% benchmark set by Council)
 - community overall - total rates paid by all properties (ES and SDC \$66.6 million including GST) are around 3% of Southland District GDP (\$2 billion including GST on production and other taxes)
 - industry/businesses overall - total rates paid by industry/businesses (ES and SDC \$40.1 million including GST) are around 2% of Southland District GDP.

- 19 At a distributional affordability level (individuals or groups of ratepayers), rate affordability issues are more apparent in pockets of Southland where median household rates are above 5% of median household income:
- at the household level, the issues are most evident in urban areas with low income levels and a high proportion of fixed rates (in particular service rates like water, sewerage, rubbish and recycling).
- Areas of Ohai, Nightcaps, Riverton, Otautau, Tuatapere, Wyndham, Lumsden all have median rates more than 5% of median household income and trigger multiple other affordability indicators (refer Table 1).
- The analysis shows some rural areas (Wairio, Kaweku and Fairfax) where median rates are more than 5% of median household income. Further investigation shows that this is the result of higher property values (and value based rates) associated with farms, particularly with few of the other social/economic wellbeing affordability indicators triggered. In addition incomes that are paid to farm workers in these areas may also be impacting the level of income reported, particularly where farm owners are absentee or because of how farm “household” income might be reported as distinct from the legal farm “entity” income.
- at the industry/business level, rates for the agriculture sector are at 5% of GDP mainly due to the high capital values (and value based rates) associated with the large land areas involved with agricultural properties like sheep, beef, dairy and cropping farms.
- In addition rates for the public administration and safety sector (which is predominantly publicly funded services like fire/police stations, schools, halls, reserves) make up just over 5% of GDP, again mainly as a result of having higher capital/land values and comparably lower GDP.
- 20 Making judgements about affordability is a matter for the subjective policy judgement of elected members. The rates affordability assessment provides information to assist elected members with this, particularly in deciding on how to fund its activities as part of the Revenue and Financing Policy. This requires Council to consider the impact that proposals for revenue have on current and future community wellbeing (Local Government Act 101(3)(b)) which involves looking at whether the community has the financial capacity to meet Council’s financial needs from both rates and other sources of funding.
- 21 As part of the process, Council must consider whether it wishes to revise any of its funding policies as a result of the analysis and what adjustments, if any, it would like to make to address any affordability issues.
- 22 With staff currently working on the review of related funding policies, staff are seeking guidance from Council about whether there are existing affordability issues linked to current funding methods which need to be considered during the policy reviews.
- 23 The report also provides a high level overview of the methods that Council could use to address affordability issues and suggests that further investigation be carried out into the option of reviewing the rate remission and postponement policy to develop specific remission/postponement provisions that are targeted to assist low income households.

Recommendation

That the Council:

- a) **Receives the report titled “Southland District Rates Affordability Assessment” dated 16 July 2020.**
- b) **Determines that this matter or decision be recognised as not significant in terms of Section 76 of the Local Government Act 2002.**
- c) **Determines that it has complied with the decision-making provisions of the Local Government Act 2002 to the extent necessary in relation to this decision; and in accordance with Section 79 of the act determines that it does not require further information, further assessment of options or further analysis of costs and benefits or advantages and disadvantages prior to making a decision on this matter.**
- d) **Receives the baseline assessment of rates affordability in Southland District (Attachment A) including the assumptions.**
- e) **Notes that overall 2019/2020 rates are affordable at the community (aggregate) level.**
- f) **Notes that distributional rate affordability issues are more apparent for low income households and request staff to investigate whether there is a need to provide specific assistance in the form of rates remission or postponement for low income (owner occupied residential) households considering the assistance already available for low income households via the government accommodation supplement and rates rebate scheme.**
- g) **Agrees to revisit the rates affordability assessment as part of the review of Council’s Revenue and Financing Policy and associated Activity Funding Needs Analysis (Local Government Act 2002 s 101(3)(b)).**

Background

Why measure rates affordability and where this fits?

- 24 While the Local Government Act 2002 does not explicitly require that Council measure rates affordability, the financial management obligations within the act provide the framework for considering affordability as part of provisions around financial prudence and sustainability in balancing financial needs with financial capacity.
- 25 The act places local authorities under the following obligations when managing their financial dealings. These are:
 - managing all financial dealings prudently and in the current and future interests of the community including ensuring that adequate provision is made to meet expenditure needs (section 101)
 - making all funding decisions following a two-step funding process that involves consideration of a set of funding principles to determine appropriate funding sources for activities and then

considering the impact that the resulting allocation of revenue liability has on current and future community wellbeing (section 101(3))

- preparing a financial strategy (section 101A) that facilitates prudent financial management by guiding funding and expenditure proposals and making transparent the overall effects of those proposals on the services, rates, debt, and investments
- providing predictability and certainty about funding through the adoption of a set of funding and financial policies (section 102)
- running a balanced budget where operating revenues are sufficient to meet operating expenses (section 100).

- 26 The core concepts are established in section 101 and 101A which inform the financial policies in section 102 and are reinforced by the balanced budget test in section 100.
- 27 The key aspects are around Council managing its financial dealings in a prudent and sustainable manner and involves ensuring that the community has the financial capacity to meet Council's financial needs.
- 28 Financial capacity is driven by the ability to generate revenue from funding sources described under Council's Revenue and Financing Policy (s103). The majority of Council's revenue comes from rates (66%), with other sources of funding making up the balance including user fees/charges, grants/subsidies, interest and borrowing.
- 29 As such, a key component of financial capacity is the community's ability to pay/afford rates.
- 30 While this paper considers rating affordability, rates are only one of the tools that Council can use to fund Council activities. The Revenue and Financing Policy (s103) specifies the mix of tools that Council can use to fund activities and the level of funding to be applied from the various sources. This requires a two stage process be followed when making decisions about how activities will be funded (s101(3)).
- 31 Stage 1 is to determine the funding tools to be used for each activity having regard to the five factors in section 101(3)(a) including:
- Council's objectives or community outcomes and how funding supports them (or not)
 - who benefits (community as a whole, parts of the community, individuals)
 - when benefits occur
 - who creates the need for expenditure
 - costs and benefits of funding separately
- 32 Stage 2 is to consider the impact of the overall allocation of revenue liability developed through stage 1 on community well-being (section 101(3)(b)). It is for this second stage where the assessment of rates affordability becomes relevant.
- 33 Given the proportion of funding that comes from rates overall, the community must be able to be afford rates now and in the future in order to sustain the services being provided and contribute to the wellbeing of the community.
- 34 As such, considering rates affordability is central to monitoring the community's ability to pay and hence assessing the financial capacity of Council to meet its financial needs and operate in a financially prudent and sustainable manner.
- 35 The Productivity Commission's 2019 report on Local Government Funding and Financing found that the current main funding tools of local government in New Zealand measure up well against the principles of a good revenue-raising system, including simplicity, efficiency and revenue

stability and the current framework provides councils with considerable flexibility in how they raise revenue.

36 The report identified that at an “aggregate level, average rates revenue per person has grown in line with incomes since the early 1990s suggesting that the rates “burden” has been about flat overall. However the report noted that some smaller, rural, and lower-income councils are under additional strain because, to raise enough revenue, they have needed to increase rates to a high level as a percentage of income.”

37 So how can Council assess whether rates are sustainable and affordable in Southland?

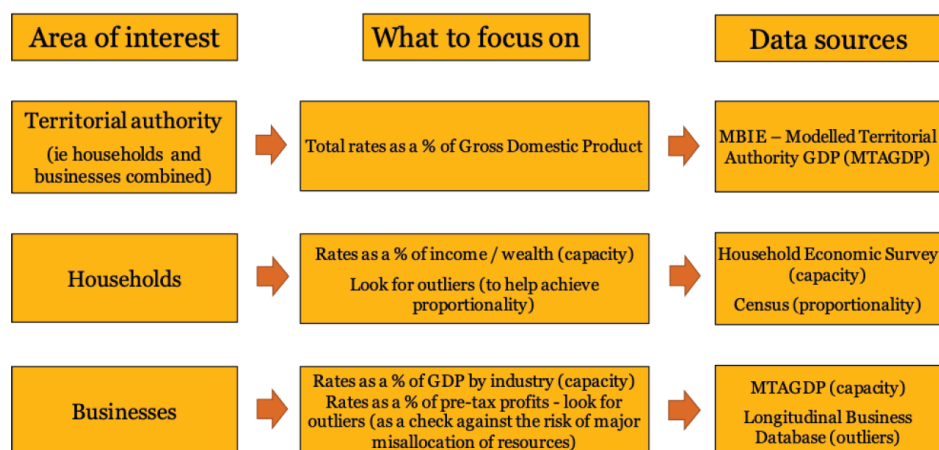
What to measure – aggregate and distributional affordability considerations

38 Attempting to measure the affordability of rates is about considering the social and economic well-being of the community. This assessment is done at the community level rather than at the individual level as Council is not charged with addressing individual rate affordability issues.

39 Central government has the primary responsibility for addressing individual affordability issues through initiatives like the rate rebate scheme and, more generally for housing costs, with the accommodation supplement and other income/housing related assistance.

40 In deciding what to look at, staff have referenced the guidance produced by Society of Local Government Managers (SOLGM)¹ to assist councils with defining and measuring affordability. This guidance suggests several data sources as a good starting point for analysing capacity to pay at three levels (Households, Businesses, Territorial Authority/Community) shown in Figure 1. All three levels have been used in the attached analysis to some extent. The approach taken to the household analysis also reflects the work carried out by Kapiti Coast District Council in 2017/2018.

Figure 1: Measuring affordability (SOLGM 2019)



41 2019/2020 rates affordability has been assessed at two levels:

- aggregate affordability – at council level where the focus is on the level of rating overall resulting from council’s budgeting and funding decisions; and
- distributional affordability – at the ratepayer or groups of ratepayer level where the focus is on the level of rates for individuals or groups in the community resulting from council’s decisions about how rates will be shared out.

¹ Society of Local Government Managers, PwC (2019) Affordability of rates and charges

- 42 At an aggregate level, the completed analysis looks at the overall level of rating in Southland for properties that have dwellings (including residential, lifestyle and farming properties). The aggregate analysis also compares how total rates sit in relation to regional Gross Domestic Product (GDP). Affordability of rates at this level is influenced by the expenditure decisions of Council as well as by its revenue base.
- 43 At a distributional level, the analysis looks at household rating between different areas of Southland, different landuse types as well as looking at industry/business rating in relation to industry GDP. At this level, ability to pay tends to be influenced by household income and business turnover/profit. How rates are distributed between different groups within the community (distributional affordability) also has an impact.
- 44 Shand in the 2007 Rate Inquiry² noted that when total housing costs, including rates, exceed 30% of gross household income, they are likely to create an affordability problem for lower income groups and suggested a very approximate threshold of rates affordability is where rates exceed 5% of gross household income.
- 45 Council also used the 5% threshold for assessing household rates affordability in its 2018-2028 Financial Strategy when it looked at average SDC rates paid by residential households in urban areas in comparison to household income.
- 46 Using the 5% threshold again as a basis, the updated assessment (Attachment A) builds on the 2018 Financial Strategy and introduces additional indicators around socioeconomic deprivation and housing cost pressure to provide further context around the drivers of distributional affordability concerns in Southland district.
- 47 The assessment also brings in an analysis of rates affordability for businesses and the community overall using GDP. At this stage, no threshold has been set by Council for the level at which community/business rates become less affordable in relation to GDP.

Overview of methodology and assumptions

- 48 In order to complete the analysis a number of data sources have been used and assumptions have been made (outlined in detail in the methodology section of the attachment).
- 49 Rates data relates to the total of Southland District Council and Environment Southland rates for the year ended 30 June 2020 (\$66.6 million including GST). This consists of \$54.4 million (including GST) of Southland District Council rates and \$12.2 million (including GST) of Environment Southland rates. Most figures in the report use total combined Council rates. However where an analysis of rate type is included in the report (e.g. mix/basis of rates) the rate figures only use Southland District Council data as a detailed breakdown by rate type and rate basis for Environment Southland rates was not provided.
- 50 Different selections of data have been used to assess rates affordability for households versus the community generally and the industry/business sector (detailed below).

Data about households

- 51 The household assessment summarises a range of household rates affordability measures for the various area units within Southland District. These geographical groupings have been used because of the way census income information is provided.
- 52 To help understand household affordability issues across the district, the report:

²Shand, Horsley, Cheyne (2007) Funding Local Government (Local Government Rates Inquiry)

- compares median rates bills (ES + SDC) with median household income across different areas and land use types in the district highlighting where rates exceed 5% household income
- looks for trends in areas that might impact rates affordability, including where there is a higher proportion of low income households, rates above the median/average and property values lower than the median
- identifies areas with a greater share of properties receiving a rate rebate to help identify areas with home owners on a low income
- identifies areas with an over representation of properties with rate arrears as an indication of difficulty paying rates
- identifies areas with a disproportionate number of people receiving the government's accommodation supplement as an indicator of housing cost pressure
- looks at the NZ Deprivation Index which measures socioeconomic deprivation to identify areas with a greater likelihood of experiencing social, economic and health disparities

53 A selection of rating units have been used in the household analysis to try to fit with the census household income "households" (places of permanent residence). This selection is based on the following criteria:

- exclusion of vacant properties
- exclusion of non-residential properties (commercial, industrial, forestry, other)
- inclusion of properties where the landuse category is likely to contain a "household". This has resulted in the inclusion of residential, lifestyle, farming and dairy farming properties that contain a residence of some type (e.g. dwelling, flat, unit, cottage, townhouse etc) noting that:
 - rates on holiday homes cannot be differentiated from rates paid on places of permanent residence and, as such it is likely that the number of rating units may be higher than the number of households reported from the census. The impact of this is slightly offset by the use of median rates versus average rates in the analysis.
 - because farming and dairy farm rates cannot be separated between the place of residence and productive portions of the property, median rates in rural areas are likely to be higher. This is because rates are assessed against the total farm area and the larger areas have large property values which means that rural properties typically pay higher capital/land value based rates. In addition, incomes that are paid to farm workers in these areas may also be impacting the level of income reported, particularly where farm owners are absentee or because of how farm "household" income might be reported as distinct from the legal farm "entity" income.
- exclusion of properties that have had rates written off or are non-rateable
- exclusion of properties that could not be matched to a meshblock

Using this criteria 12,498 rating units with total rates of \$54.4 million have been used for the household analysis which is a subset of the total number of rating units of 20,328 with total rates of \$66.6 million.

54 Population, households and income data is sourced from the 2013 census, with these figures being the latest available for area unit and meshblock geographic reporting levels. These levels have been selected because they provide the greatest level of detail and spread of income information to show the variations between different parts of the district.

55 Median household incomes for 2019 have been estimated from 2013 census information using the labour cost index salary and wage rates (June 2019 quarter) which equates to an inflation rate of 10.6% between March 2013 and March 2019. Estimates have been used due to the delay in the release of census 2018 household income information and the inability to obtain alternative area unit and meshblock income data.

Data about community and industry/business

- 56 The community and industry/business assessment looks at rates in comparison to Gross Domestic Product (GDP) (total and by industry type) as a way to indicate the overall capacity of the community and industry/business to pay rates.
- 57 The analysis uses modelled territorial authority GDP data produced by Ministry for Business, Innovation and Employment (MBIE) which estimates the gross domestic product (value of goods and services) produced within each territorial authority area.
- 58 While SOLGM suggested using GDP as a measure of the capacity of businesses (and the community more generally) to pay rates, it is important to note that GDP is a measure of turnover rather than revenue or 'net profit' and as such is not directly comparable to income measures. While this difference is not ideal, there are significant limitations accessing income/profit information for Southland industry/businesses which makes other approaches impractical at this time.
- 59 Southland District's total GDP in 2018 was \$2.025 billion. Given that the breakdown of GDP by industry type is not currently available, each industry's share of 2018 GDP has been estimated using that industry's average share of total GDP between 2015-2017.
- 60 A selection of rating units have been used in the industry/business analysis to try to fit with the GDP industry classifications. This selection is based on the following criteria:
- inclusion of properties where the main landuse is likely to relate to GDP classifications (commercial, industrial, forestry, mining, farming, dairy farming, other)
 - exclusion of residential and lifestyle properties

Using this criteria 7,569 rating units with total rates of \$40.1 million have been used for the industry/business analysis which is a subset of the total number of rating units of 20,328 with total rates of \$66.6 million.

Overview of fundings

- 61 The full analysis of rates affordability is included in Attachment A. A summary of the findings for each component (households, community and industry/business) is detailed below.

Aggregate affordability

- 62 For households overall, at an aggregate level, median household rates make up 3.95% of median household income in the district (Table 1) suggesting that at an aggregate level, household rates are affordable (being below 5%).
- 63 For the community overall, at an aggregate level, total rates paid by all properties within Southland District (\$66.6 million ES and SDC) are around 3.3% of Southland District GDP (\$2.025 billion) with SDC rates (\$54.5 million) making up around 2.7% of GDP. While Council has not set a rates/GDP threshold, the ratio is similar to (or less than) other territorial authorities whose rates range between 2-5% of GDP (noting that the rates for these authorities do not include the regional council rates for properties within the territorial authority area which have been included in the Southland data). These include Invercargill City (2%), Gore District (3%), Clutha (3%), Waitaki District (3%), Waimate District (4%), Timaru District (2%), Manawatu District (4%), Horowhenua District (4%), South Taranaki District (2%), Masterton District (4%) and Whanganui District (4%).

- 64 For industry/business overall, at an aggregate level, total rates paid by industry/business properties (commercial, industrial, farming, dairy farming, forestry, mining, other) make up 2.1% of GDP (Table 2).
- 65 This suggests rates are generally affordable at an overall aggregate level.
- 66 If Council's overall level of rating is affordable, the way rates are distributed out amongst the community could still create affordability issues (e.g. low income communities).

Distributional affordability

Household rates affordability

- 67 The assessment (Attachment A) identified that household rate affordability issues (where median rates exceed 5% of median household income) exist in pockets throughout Southland and are most evident in urban areas with low income levels and a high proportion of fixed rates.
- 68 Table 1 summarises the household rate affordability assessments across this range of indicators (which are described in more detail in the attachment). A larger version of this table can be viewed in Attachment B).

Table 1: Southland Residential Household Rates Affordability Summary by Area Unit (see attachment B for full size version)

Area Unit	Rates % Household Income	Median Household Income	Rates 2019 (SDC + ES)			Usually Resident Population (2013)	Number of Households (2013)	Number of Rating Units (selected)	Median Property Value (selected)		2018 NZ Deprivation Index ¹ (least)-10 (most)	Low Income Households (HH)		Rate Arrears		Rate Rebates		Accommodation Supplement	
			Median	Average	Total (\$m)				Capital Value	Land Value		% HH over AU share	% AU HH income under \$33k	% rating units over AU share	% AU rating units in arrears	% rating units over AU share	% AU rating units with rebate	% pop. over AU share	% AU pop. with supplement
Wairio ^(R)	10.19%	\$71,364	\$7,275	\$9,480	\$2.3	942	354	243	\$3.52m	\$2.88m	6		10-20%		5-10%		<5%		<3%
Ohai ^(U)	8.31%	\$30,427	\$2,527	\$2,533	\$0.4	303	126	151	\$57k	\$15k	9	1-2%	30+	2-3%	15%+	3-6%	10-15%	2-3%	7%+
Kaweku ^(R)	7.11%	\$88,072	\$6,262	\$8,364	\$1.4	567	204	166	\$2.92m	\$2.39m	5		<10%		<5%		<5%		
Riverton East ^(U)	7.01%	\$38,946	\$2,731	\$2,765	\$0.6	435	192	204	\$213k	\$57k	8	2-3%	30+	0<1%	5-10%	<3%	5-10%	2-3%	5-7%
Nightcaps ^(U)	6.81%	\$36,844	\$2,509	\$2,525	\$0.4	294	135	153	\$80k	\$22k	10	1-2%	30+	1-2%	10-15%	3-6%	10-15%	2-3%	7%+
Riverton West ^(U)	5.74%	\$51,559	\$2,959	\$3,015	\$2.5	999	459	823	\$360k	\$173k	6	2-3%	20-30%	1-2%	5-10%	3-6%	5-10%	2-3%	3-5%
Tuatapere ^(U)	5.65%	\$46,470	\$2,624	\$2,655	\$0.7	558	246	261	\$141k	\$32k	8	1-2%	20-30%	2-3%	15%+	6-10%	10-15%	2-3%	5-7%
Manapouri ^(M)	5.40%	\$55,764	\$3,010	\$3,206	\$0.8	228	105	244	\$315k	\$121k	4	<1%	20-30%		5-10%	<5%	<1%	3-5%	
Wyndham ^(U)	5.35%	\$58,087	\$3,108	\$2,984	\$0.7	534	222	232	\$120k	\$17k	8	1-2%	20-30%	3%+	15%+	3-6%	5-10%	3-4%	7%+
Fairfax ^(R)	5.30%	\$84,863	\$4,499	\$7,340	\$3.7	1,908	693	510	\$1.97m	\$1.58m	5		10-20%		<5%	<5%		<3%	
Otautau ^(U)	5.09%	\$52,887	\$2,694	\$2,707	\$0.9	669	291	320	\$185k	\$20k	8	1-2%	20-30%	2-3%	10-15%	3-6%	5-10%	5-6%	7%+
Lumsden ^(U)	5.06%	\$53,108	\$2,686	\$2,703	\$0.6	405	177	220	\$180k	\$29k	8	1-2%	20-30%	2-3%	10-15%	<3%	<5%	1-2%	5-7%
Te Anau ^(U)	4.96%	\$62,513	\$3,100	\$3,195	\$4.7	1,911	813	1,469	\$390k	\$155k	4	1-2%	10-20%		<5%	<5%		<3%	
Winton ^(U)	4.66%	\$58,530	\$2,729	\$2,784	\$3.0	2,211	957	1,074	\$260k	\$99k	6	4%+	20-30%		5-10%	10%+	5-10%	6-7%	3-5%
Balfour ^(U)	4.51%	\$55,985	\$2,526	\$2,453	\$0.2	126	54	64	\$158k	\$20k	2	<1%	20-30%		5-10%	<3%	<5%		
Mararoa River ^(R)	4.08%	\$83,314	\$3,397	\$6,981	\$3.9	1,587	594	552	\$965k	\$390k	3		<10%		<5%	<5%		<3%	
Stewart Island ^(U)	3.95%	\$59,526	\$2,353	\$2,479	\$0.8	381	171	334	\$310k	\$126k	5	1-2%	20-30%		<5%	<5%		<3%	
Milford ^(U)	3.91%	\$52,555	\$2,054	\$2,283	\$0.05	117	30	20	\$673k	\$570k	3				<5%				
Toetoes ^(R)	3.86%	\$71,033	\$2,742	\$4,551	\$2.8	1,647	582	624	\$945k	\$640k	5		10-20%		5-10%	<5%		<3%	
Mossburn ^(M)	3.84%	\$58,973	\$2,262	\$2,755	\$0.3	210	87	97	\$165k	\$20k	5		10-20%	<1%	5-10%	<3%	<5%	<1%	<3%
Edendale ^(U)	3.63%	\$74,241	\$2,697	\$2,884	\$0.7	555	231	253	\$220k	\$67k	5	<1%	10-20%		5-10%	<3%	<5%	<1%	3-5%
Riversdale ^(U)	3.40%	\$63,619	\$2,165	\$2,175	\$0.4	372	159	185	\$200k	\$29k	5		10-20%	<1%	5-10%	<5%		<3%	
Waituna ^(U)	3.29%	\$85,416	\$2,808	\$6,595	\$3.1	1,683	612	466	\$1.05m	\$785k	4		<10%		5-10%	<5%		<3%	
Waikaia ^(R)	3.15%	\$74,352	\$2,340	\$6,823	\$4.5	1,656	642	663	\$560k	\$220k	5		10-20%		5-10%	<5%		<3%	
Te Waewae ^(R)	3.13%	\$65,168	\$2,043	\$4,396	\$2.7	1,380	534	604	\$465k	\$185k	6	1-2%	20-30%	<1%	5-10%	<5%		<3%	
Hokonui ^(U)	2.98%	\$87,850	\$2,615	\$5,665	\$5.3	3,087	1,089	939	\$840k	\$275k	4		<10%		5-10%	<5%		<3%	
Wallacetown ^(U)	2.89%	\$78,999	\$2,281	\$2,353	\$0.6	663	243	263	\$255k	\$56k	4		10-20%	1-2%	10-15%	<3%	<5%	<3%	
Dacre ^(U)	2.53%	\$93,161	\$2,356	\$5,309	\$2.7	1,617	579	504	\$933k	\$535k	4		<10%		5-10%	<5%		<3%	
Woodlands ^(U)	2.46%	\$71,918	\$1,769	\$2,789	\$0.3	264	111	111	\$340k	\$80k	4		10-20%		5-10%	<3%	<5%	<3%	
Waianiwa ^(R)	2.29%	\$85,748	\$1,966	\$4,617	\$2.9	1,968	711	620	\$603k	\$228k	4		<10%		5-10%	<5%		<3%	
Makarewa North ^(R)	1.74%	\$90,727	\$1,579	\$1,780	\$0.2	327	120	129	\$475k	\$170k	2		10-20%		<5%	<5%			
Southland	3.95%	\$70,590	\$2,789	\$4,317	\$54.0	29,613	11,523	12,498	\$365k	\$143k									

1 – These figures have been obtained by calculating the weighted average deprivation score for Statistical Area 1 areas contained within the specified area unit. Note – the NZDep2018 figures are from the December 2019 Interim Research Report. (U) denotes a mainly urban area; (R) denotes a mainly rural area; (M) denotes a mix of urban and rural areas

- 69 This shows that some parts of the District, in particular the urban areas of Ohai, Nightcaps, Riverton, Otautau, Tuatapere, Wyndham and Lumsden not only had rates more than 5% of household income, but also triggered several other affordability indicators including an over- representation in the proportion of households with low incomes, properties with rate arrears or receiving a rate rebate and population receiving an accommodation supplement as well as higher deprivation. This is shown by the shading for each indicator across areas units in Table 1 - the darker shading across more columns suggests a greater likelihood of affordability issues. This is usually because of lower income levels rather than higher rates (although the higher proportion of fixed rates in these areas plays a contributing role).
- 70 In addition, the initial rates affordability analysis shows some rural areas (Wairio, Kaweku and Fairfax) where median rates are more than 5% of median household income. However this is largely a result of higher property values resulting in higher rates, with few other affordability indicators showing.
- 71 Based on this analysis it is estimated that between 600 to 1,800 households may be experiencing rate affordability issues based on the number of low income households (earning less than \$33,000) overall and in areas where median rates exceed 5% of median household income (before any government rebates have been applied). Just over 600 properties accessed a rates rebate in 2018/2019.
- 72 The area unit map (Figure 2) shows how rates as a percentage of median household income varies across the district in area unit groupings. The meshblock map (Figure 3) provides a picture of the same information for smaller geographical meshblock areas which are explored in more detail in the area unit summaries from page 27 onwards in Attachment A.

Figure 2: Southland District Area Unit Heatmap: rates as % of median income

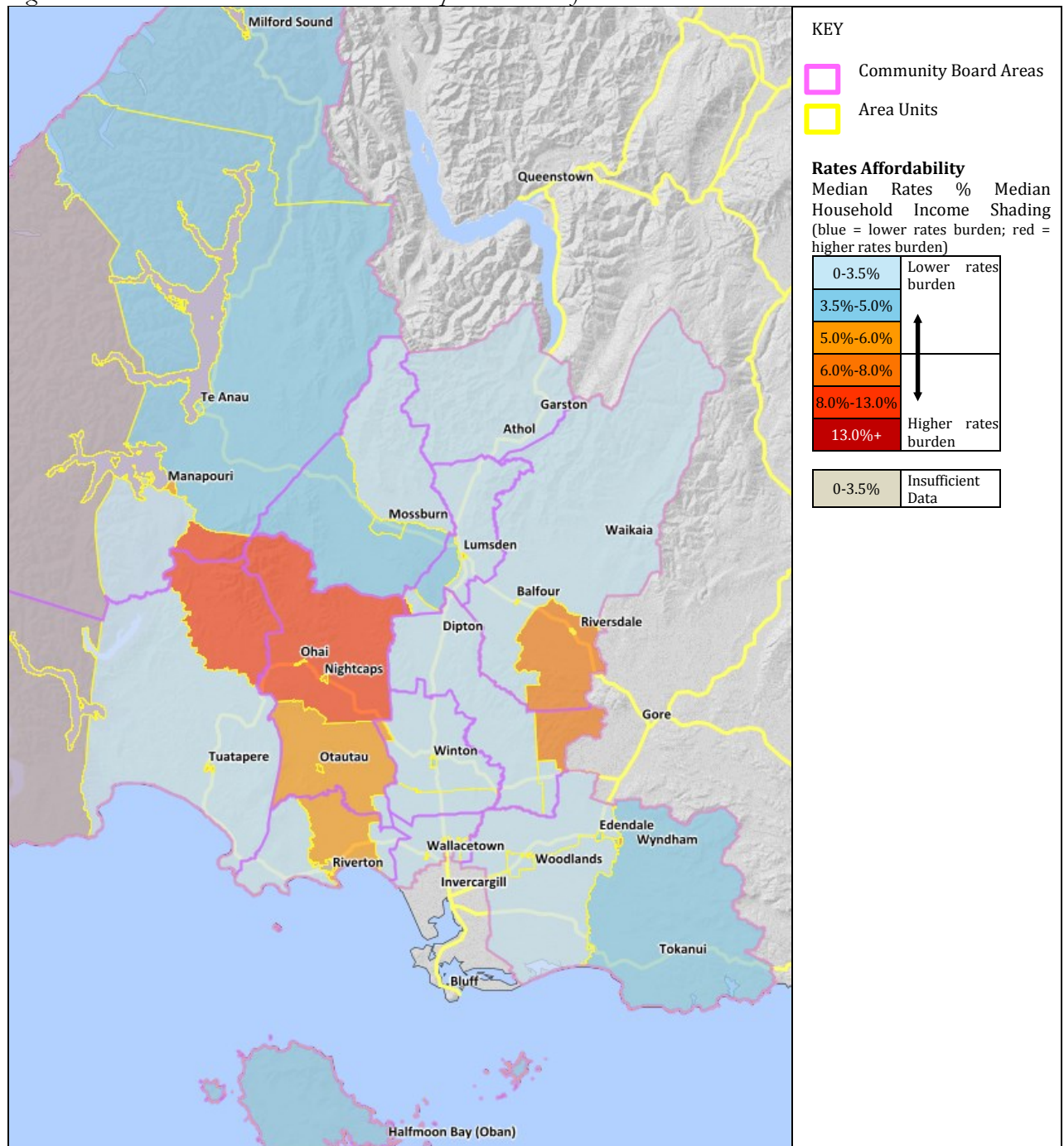
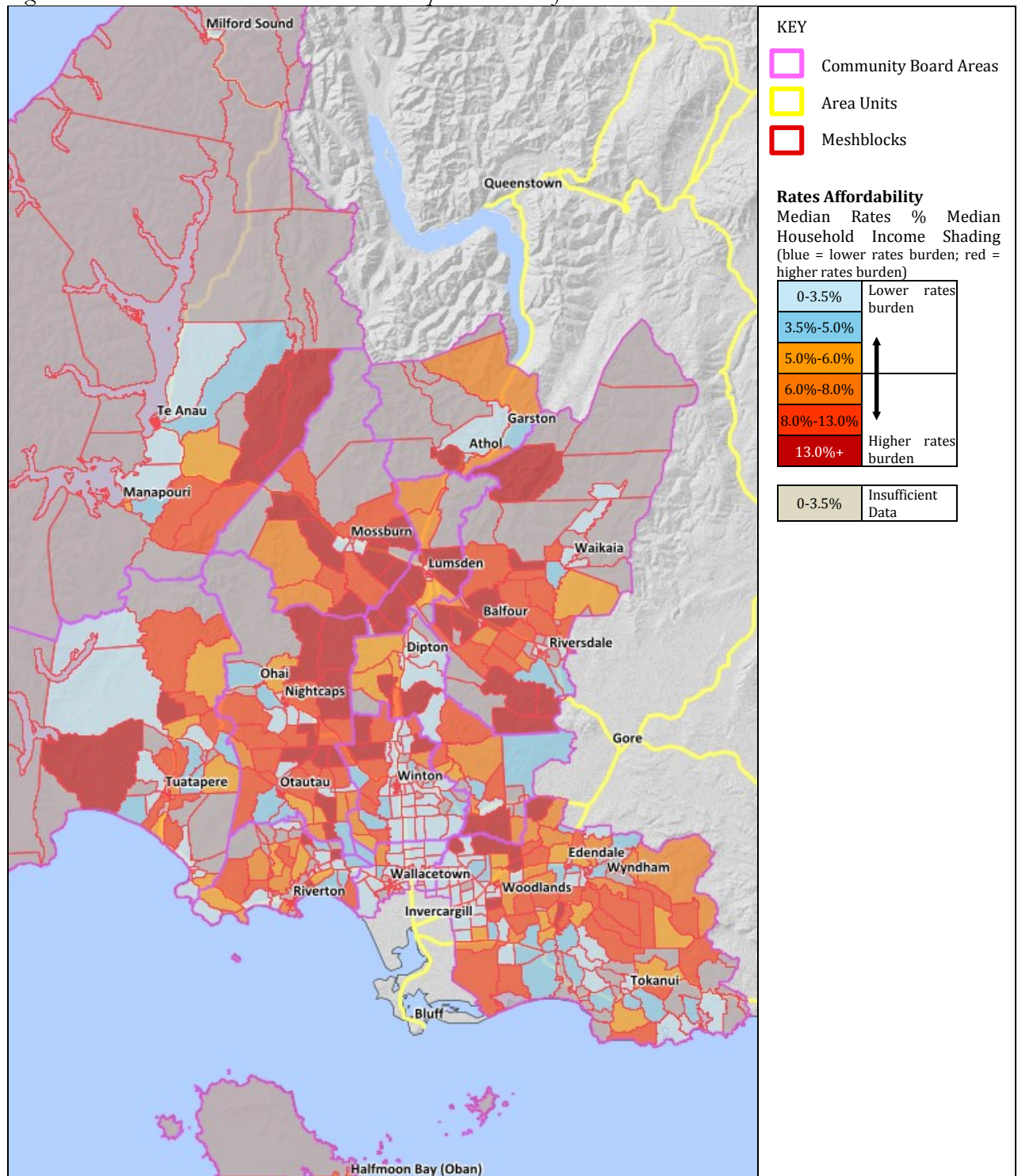


Figure 3 - Southland District Meshblock Heatmap: rates as % of median income



Industry/Business rates affordability

- 73 The capacity of industry/business to pay rates has also been considered using modelled territorial authority GDP data where rates for each industry type is considered against the GDP (value of goods and services produced) for each industry sector.
- 74 The assessment identifies that industry/business rates affordability issues are most likely to occur within the agriculture sector where rates are 5% of GDP, primarily caused by high capital values that result from the large land areas involved with agricultural properties like sheep, beef, dairy and cropping farms.
- 75 Table 2 shows data for rates relative to GDP for different industries within Southland from the analysis.

Table 2: Southland Industry/Business Rates Affordability Summary

Industry Grouping ³	2018 GDP ('000) (assessed)	Total Rates ('000) (ES and SDC)	Rates % GDP
Agriculture	\$672,626	\$33,434	5.0%
Commercial – Trade and Transport	\$227,538	\$954	0.4%
Commercial – Other	\$259,497	\$415	0.2%
Commercial - Accommodation	\$31,466	\$1,108	3.5%
Education and Training	\$40,181	\$185	0.5%
Forestry, Fishing Mining, Utilities	\$229,379	\$1,830	0.8%
Health and Social Assistance	\$18,997	\$170	0.9%
Manufacturing	\$384,472	\$1,497	0.4%
Public Administration and Safety	\$9,948	\$507	5.1%
Total (excluding GST on Production, Import Duties and Other Taxes)⁴	\$1,874,104⁴	\$40,098	2.1%

- 76 Total rates for the agriculture industry sits at 5% of GDP having both the highest GDP (\$673m) and rates (\$33m) of all industry sectors with 53% of the rates for this industry associated with pastoral fattening and 41% with dairy farming. Given the large land areas involved, agriculture typically has higher land/capital values which means this sector pays a larger portion of value-based rates resulting in the higher rates as a percentage of GDP.
- 77 Total rates for public administration and safety (which includes local government administration and central government administration, defence and public safety) sits at 5.1% of GDP. By nature these activities are likely to have relatively low GDP figures. However this sector is likely to have comparably high levels of rates because the properties included in the analysis have high capital values (fire/police/ambulance stations/public halls) or have larger land areas (sports/golf/bowling/racing clubs) and therefore pay more in value-based rates. In addition, a large proportion of these properties (between 32-40%) pay fixed service rates (for wastewater, water and rubbish/recycling collection) which also contributes to the rating level of this industry group.
- 78 While Council has not set a threshold for rates in relation to GDP for industry/business, the data suggests that the agriculture sector and public administration and safety sector are more likely to experience distributional affordability issues.

³ Details of the approach taken to assigning rates to GDP groupings based on GDP classifications is explained in the Assumptions section of the attachment (page 24).

⁴ GST on Production, Import Duties and Other Taxes (\$151 million in 2018) has not been in the industry analysis as it cannot be allocated specific industry groups. This accounts for variation between table total and total Southland District GDP (\$2.025 billion).

- 79 Overall the analysis indicates that distributional affordability issues do exist for groups of properties in the District. However, before Council considers any rating changes as a result, it useful to examine the underlying causes for these differences.

Drivers of distributional affordability issues

- 80 Distributional rate affordability issues are primarily driven by two factors:
- a) how Council decides to share rates out amongst the community and the resulting amount of rates that individuals or groups in the community pay (level of rating); and
 - b) the ability or capacity of these individuals or groups to pay the rates (level of income). This is typically determined by the level of income/wealth/profit/turnover but may also be influenced level of disposable income (income after tax) or discretionary income (income after tax and other mandatory housing costs like rates, mortgage payments, insurance and essential costs like food, heating and clothing).

A) Sharing out rates – concepts of user pays and taxation

- 81 The 2007 Rate Inquiry⁵ noted that *“taxes on real estate property (like land) have a very long history, because land has long been seen as a visible indicator of wealth and ability to pay and, land is immobile, which makes it easy both to assess liability and to collect taxes on.”*
- 82 At their base, rates are a hybrid of a charge for services and a tax on real estate property.
- 83 Rates are typically used as a service charge where it is either not practical or efficient to charge users directly. Rates as a tax are typically used to fund local public goods where everyone is expected to make a contribution regardless of the level of use.
- 84 Decisions on how to distribute rates out amongst the community are made by elected members.
- 85 As mentioned above, generally there are two aspects to this – allocation based on a principle of user pays or allocation based on a principle of taxation. The two principles are not mutually exclusive, they can both be used in one rating system and tend to be used differently depending on the nature of the activities being funded.
- 86 Where the activities being funded have benefits that are targeted more to individuals or groups within the community, Council’s typically opt for user pays rates (like targeted water and wastewater rates).
- 87 Where the activities being funded don’t fit with more targeted “user pays” thinking and benefit the whole community or public generally, Council’s typically opt for taxation type rates (like the general rate or other district-wide targeted rates).
- 88 For some activities, councils also a use a mix of both approaches. For example, Council’s roading rate applies a “user pays” differential based on tonnage to reflect road use/damage and a “public benefit/taxation” fixed charge to reflect the fact that everyone can access the roading network as well as goods/services being transported on the network.
- 89 Southland District Council uses a range of these approaches within its rating system which includes a general rate, uniform annual general charge and various targeted rates which use a mix of fixed charges and value based rates (largely based on capital value) to fund activities.

⁵Shand, Horsley, Cheyne (2007) Funding Local Government (Local Government Rates Inquiry)

- 90 This means that the level of rates, even for a residential property, can vary significantly depending on what rates they are paying for and how these are charged. This can complicate the assessment of rates affordability because not all properties are paying all rates.
- 91 For example some residential properties are connected to reticulated water and wastewater services and receive a rubbish and recycling bin collection. These services add over \$1,200 to rates for a typical residential property in “served” urban areas. However households without these services do not pay these same costs in their rates, instead providing and paying for their own water tank and septic tank individually or disposing of their own waste on their property or at transfer stations.
- 92 Council’s rating system has a number of these which means rates paid by properties in different parts of the district vary. These variable rates include local rates for services such as halls, pools, community board and community development areas and service rates for services like water, sewerage, rubbish, recycling as well as water/sewerage capital loan repayments (which depending on the scheme and repayment term may add between \$143 to \$1000 onto the property’s annual rate amount).
- 93 Because the rates affordability assessment does not adjust for these differences (other than using median values to reduce the impact of extremes), the parts of the district where properties pay these rates are more likely to show up as having median rates above 5% of household income, noting that households outside of these areas also incur service costs (like water and sewerage) separately from their rates.
- 94 It is important that Council is aware of these differences when comparing rates and looking at the affordability analysis, particularly when considering any changes to shift the incidence of rating to address affordability concerns.

B) Capacity to pay rates – does property value relate to income?

- 95 Under the Rating Act, councils can levy rates based on property land values and/or capital values or as a fixed charge. This makes rates a tax on property, where the system uses property value as the measure of ability to pay rather than income levels.
- 96 However the rates affordability assessment uses household income as a measure of rates affordability rather than property value which does create a conflict between household income as the measure and property value as the basis for setting the tax.
- 97 This raises the question as to whether rates based on property values bear any relation to ability to pay?
- 98 The Society for Local Government Managers (SOLGM)⁶ noted that Coleman and Grimes⁷ found a positive relationship between property values and household incomes at both area unit and territorial authority levels. They found that a tax based on land or capital values tends to be progressive in relation to income and wealth (meaning the tax increases with higher value), with some exceptions including:
- “asset rich but cash poor” homeowners like retirees who are on a small fixed income (eg superannuation and little or no other income) but who own their own home
 - homeowners who are heavily mortgaged versus those who are mortgage-free.

⁶ Society for Local Government Managers. (2019) Affordability of rates and charges

⁷ Coleman, A. and Grimes, A. (2009) Fiscal, Distributional and Efficiency Impacts of Land and Property Taxes, Motu Working Paper

- 99 A slightly earlier study performed by Covec⁸ for the 2007 Rates Inquiry also found a clear positive relationship between income and capital value noting the relationship was weaker for land value. However this study also found that there were instances where property value is disproportionately high, or low, relative to income.
- 100 Hence it can be concluded that while there is a relationship between rating value and income (or wealth) at a high level, there are instances where the relationship diverges significantly from the average.
- 101 The affordability analysis does make an attempt to consider these differences by looking at the variation of income within area units and highlighting areas where there is an over-representation of households either with low income or accessing rates rebates as well as an over-representation of people receiving the accommodation supplement to assist with their housing costs. The assessment also includes data on median property capital values in each area unit and by different landuse types for further context. These additional indicators help to identify the circumstances under which a ratepayer's ability to pay rates is more likely to be an issue and where these issues are more likely to exist in the district.
- 102 However given the inability to obtain detailed individual household or business income/profit data, it is likely that some households or businesses will also experience issues in addition to those areas identified in the report.
- 103 Reports from both the 2007 Rate Inquiry and 2019 Productivity Commission identify the types of circumstances which are most likely to cause rates affordability issues.
- 104 The 2007 Rate Inquiry⁹ report noted that while there are *"pockets of affordability problems in all types of household size, composition, and principal income source, it is low-income groups, one-person households, single-parent households, and those whose principal income is New Zealand Superannuation that are most likely to illustrate particular rates affordability concerns"*.
- 105 The Productivity Commission¹⁰ noted that *"while concerns about the affordability of rates typically focus on low-income (particularly elderly) households who own their own homes, usually without a mortgage (asset rich/income poor), generally these households have much lower housing costs than other low-income New Zealand households who rent or who have a mortgage."*
- 106 Instead the commission found that the issues for this asset rich/income poor group (exacerbated by their ownership of 'high value' properties which attract higher levels of value-base rates) can be quite different to the "low asset/low income" ratepayer.
- 107 *"Most of the discussion of the affordability of rates for particular households focuses on ratepayers (owners of residential property). Yet the economically most vulnerable households are largely renting households (Perry, 2018a)...while landlords have choices about whether to continue to own and rent their properties, renters on average are less able to make choices that find them paying no rent."*¹⁰
- 108 The report noted that the households facing material hardship are mostly young, renting and on low incomes. Perry (2018b) looked at various measures of material hardship and found that the relationship between experiencing material hardship and living in low-income households is inexact.

⁸ COVEC, (2007) Trends in the Use of Rating Tools Nationally to Fund Services Report prepared for the Local Government Rates Inquiry

⁹Shand, Horsley, Cheyne (2007) Funding Local Government (Local Government Rates Inquiry)

¹⁰ Productivity Commission (2019) Local Government Funding and Financing

- 109 *“Owning a home without a mortgage makes a significant difference. While 35% of those aged over 65 have before-housing-cost incomes in the lowest income quintile, this falls to 13% after accounting for housing costs, and only 7% on an index of material wellbeing. One reason is that (in 2015) 72% of those over 65 lived in their own house without a mortgage.”¹⁰*
- 110 As such, while a lot of focus has been on the challenges faced by the “asset rich/income poor” group, after taking into account both the government rate rebate scheme and the ability to use rate postponement policies (which work like reverse mortgages to access funds for rates payment), it is possible that affordability issues for this group may already largely dealt with.
- 111 Instead affordability issues may still need to be addressed for young, renting and other low income households.

Ways of addressing rates affordability issues

Council’s role in considering ability to pay

- 112 Making judgements about affordability is a matter for the subjective judgement of elected members in developing their policies.
- 113 In their 2019 affordability guidance, SOLGM noted that it is not uncommon for ratepayers (and others) to complain about the fairness of local government rates and charges both in terms of affordability but also because of differences in the perceived benefits provided by council activities and the allocation of funding across different council services.
- 114 The rates affordability assessment uses published data to provide information to assist Council to make a subjective assessment of the affordability of rates and the ability of the community to pay rates separately from opinions about willingness to pay.
- 115 Overall, while the assessment is not a perfect model of what ratepayers can or cannot afford based on their individual circumstances, it does provide data and a framework within which the affordability of rates and the distribution of rates can be discussed in more detail.
- 116 This can assist Council to consider whether the current approach to funding and rating for its activities is appropriate taking into account affordability and the impact on community wellbeing (under Local Government Act s101(3)) and when looking at any changes to its approach to funding and rating as part of upcoming polity reviews.
- 117 As outlined earlier in the report, when deciding on how to fund its activities, section 101(3) (b) of the Local Government Act 2002 requires Council to consider the impact of its proposals for revenue on current and future community wellbeing.
- 118 This is a very high level subjective policy judgement about whether there is a need to revise funding policies given the impact on the four wellbeing’s.
- 119 Part of this involves considering whether the community has the financial capacity to meet Council’s financial needs both from rates and other sources of funding.
- 120 Implicit in that test are the questions about whether Council has an “aggregate affordability” issue (ie is the total level of rating Council is aiming to collect too high?) or whether Council has a “distributional affordability” issue (ie is the proposed allocation of rating costs between different groups – geographical areas, types of properties, service users - too high?).
- 121 The rates affordability assessment (Attachment A) provides information to assist elected members when making such judgements.

- 122 The assessment suggests that the main areas of tension currently are at a distributional level rather than aggregate level:
- household affordability indicators show tension mainly in low income areas of the district which have a high proportion of rates set as a fixed charge for services like water, sewerage and rubbish. Published research also suggests that young renting households are more likely to experience rates affordability pressure.
 - industry/business indicators show the agricultural and public safety/administration sectors with the highest level of rates as a proportion of GDP.
- 123 Council can use this information to consider whether it wishes to revise any of its current funding policies and also when thinking about the appropriateness of its funding choices during the reviews of its Revenue and Financing Policy, Rate Remission and Postponement Policy, rating system or budgeting process.
- 124 In their 2019 report, while the Productivity Commission¹¹ pointed out the requirement for councils to consider both the benefits principle and ability to pay in making its decisions about how it funds its activities under section 101(3) of the Local Government Act, in their view tackling “ability to pay” needed to complement relevant central government policies given that the primary role for income redistribution sits with central government.
- 125 The main forms of central government assistance for housing costs are the accommodation supplement and rate rebates scheme:
- the rate rebate scheme is targeted to low-income home owning households (earning less than \$44,000 per annum), providing up to \$640 a year (a little over \$12 a week) towards rates and is not available to renting households in otherwise similar circumstances.
 - the accommodation supplement is the government’s principal form of assistance for accommodation costs to low-income households living in private residences. Most recipients of the rate rebate scheme would not qualify for the supplement because their housing costs are too low (as they usually own their own homes without a mortgage).
- 126 The government also helps families in social housing through a large income-related rents subsidy programme (Ministry of Social Development, 2019) with additional assistance for some households to meet their essential housing costs coming via the temporary additional support payment.
- 127 The commission suggested that central government is best placed to tackle pressures on low-income households facing high housing costs. This is because central government holds detailed information on individual/household circumstances which is needed to determine equitable assistance and is also responsible for the taxation system which is used to fund any income support programmes.
- 128 Given this, Council must also consider whether it has a role to play in addressing ability to pay for low income/young/renting households (and possibly the agricultural sector) over and above the approaches taken by central government.
- 129 The completed affordability assessment tells us that there are potentially current rate affordability issues in low income areas and also with the level of rates paid by the agriculture sector. As such, staff are seeking guidance from Council about whether there is an existing issue that needs to be

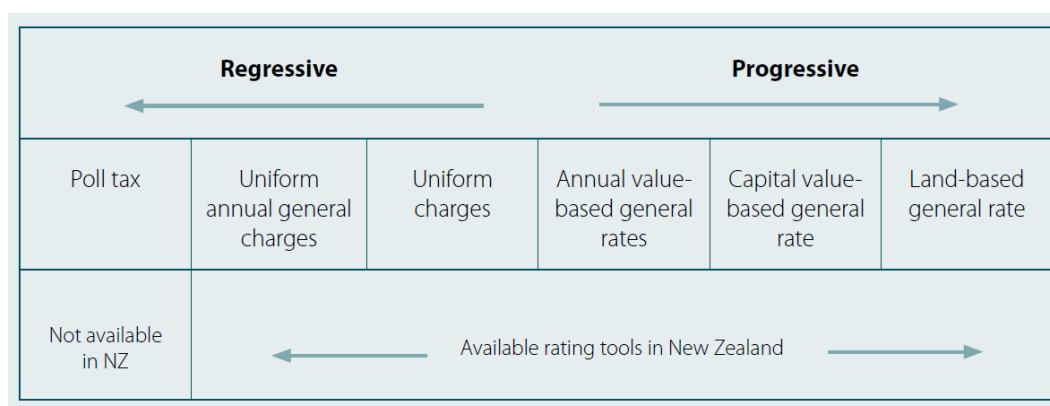
¹¹ Productivity Commission (2019) Local Government Funding and Financing

addressed during the upcoming policy reviews and, if so, the nature of the issue that Council is seeking to address.

Allocation of rates – aspects to consider

- 130 Determining how to allocate rates is an issue for Council to decide. Setting rates is a form of taxation and like any taxation system there is no perfect approach. What is affordable or equitable to one person might be unaffordable or inequitable to another.
- 131 Sector guidance suggests that elected members should focus on whether the rates are appropriate and aim to strike a balance in this regard.
- 132 While there are numbers principles to consider when allocating rates, a key taxation concept related to affordability is the concept of vertical equity - where residents with greater ability to pay should pay more tax than those with less ability to pay.
- 133 As stated earlier, within the rating system, ability to pay in this context is measured by property value (rather than income), with capital value believed to be a better reflection of ability to pay compared to land value (Shand¹²).
- 134 Research in the 2007 Rate Inquiry¹² report indicated that there is a strong link between property values, in particular capital value, and household incomes. On this basis, for the purposes of this discussion, it is assumed that higher property capital values indicate a greater ability to pay.
- 135 The degree to which someone with a higher property value pays proportionately more rates is termed the “progressivity” of the tax system. The 2007 Rate Inquiry¹² included a table summarising local government funding tools in terms of their regressive and progressive effects on household affordability (Figure 4 below).

Figure 4: Continuum of regressive-progressive rating tools



- 136 Funding tools that have a proportionally greater impact on ratepayer income as income decreases are regressive. Progressive funding tools impose costs that increase as a proportion of total income. Of the rating tools commonly used in New Zealand, uniform annual general charges (UAGCs) and fixed charges by way of targeted rates are more regressive than general rates. The statutory 30% cap on UAGCs and fixed charges other than for water and sewerage is designed to limit these regressive impacts.
- 137 Different rating tools have different proportionality. Fixed charges are often favoured because they are seen as fairer - everyone pays the same for the same service acting like a club/access charge. However, from an affordability perspective, fixed charges are classed as more regressive

¹² Shand, Horsley, Cheyne (2007) Funding Local Government (Local Government Rates Inquiry)

as they have no proportionality with income (or property value as a proxy for income). In comparison, values based rates like capital value and land value are considered to be more progressive.

- 138 In their affordability guidance SOLGM state that *“the design of a funding system (rates in particular) is affordable if the distribution of the rates burden is such that everyone experiences the same amount of pain (sacrifice) for the last dollar of rates paid. Generally, for a given level of rates, those who are well off don’t feel as much pain as those who are less fortunate. It follows that those who have more capacity to pay rates should be asked to contribute more.”*
- 139 This suggests that those with higher capital or land value should pay more in rates.
- 140 The 2007 rates inquiry¹³ observed that rating systems in general become more regressive in relation to incomes when there are more fixed charges. As such, the level of fixed charges is a key area for Council to consider when looking at rates affordability, particularly in relation to low income households.
- 141 The Local Government (Rating) Act 2002 currently limits the proportion of revenue from fixed charges (excluding service rates like water and wastewater) to 30% of rates revenue.
- 142 Excluding these service charges, Council currently collects 27% of revenue from fixed charges. However when service rates for water, wastewater, rubbish and recycling are included, the proportion of fixed charges is over 50% (Table 5 in paragraph 152).
- 143 In addition, when looking at the median fixed rates that different landuse sectors pay (Table 4 paragraph 150) total fixed charges (including service fixed charges) can make up over 90% of the rates for a residential rating unit overall and over 40% when service fixed charges are excluded.
- 144 Taking this into account, Council’s rating system may be considered to be too regressive with an over reliance on fixed charges. This means that people who own (or rent) properties of lower value will likely be contributing a greater percentage of their property’s value in rates than people with higher value properties.
- 145 Given this, the level of fixed charges is one area that Council may wish to look at if it wishes to make adjustments in relation to rates affordability.
- 146 The discussion below summarises the three high level approaches available to Council to tackle ability to pay issues. A detailed assessment of these options has not been completed but will be developed if Council wishes to consider these further.

Methods for responding to ability to pay concerns

A. Changing the way rates are shared out amongst ratepayers (distributional affordability)

- 147 This does not change the total amount of rates collected, just how they are distributed amongst ratepayers. The main options include:
- a) collecting more rates based on property value (capital/land value) instead of fixed charges which increases rates for higher-value properties and reduces rates for lower-value properties or vice versa.
 - b) making greater use of targeted rates and/or differentials and charging certain groups of ratepayers more/less for specific activities which would increase rates for those properties

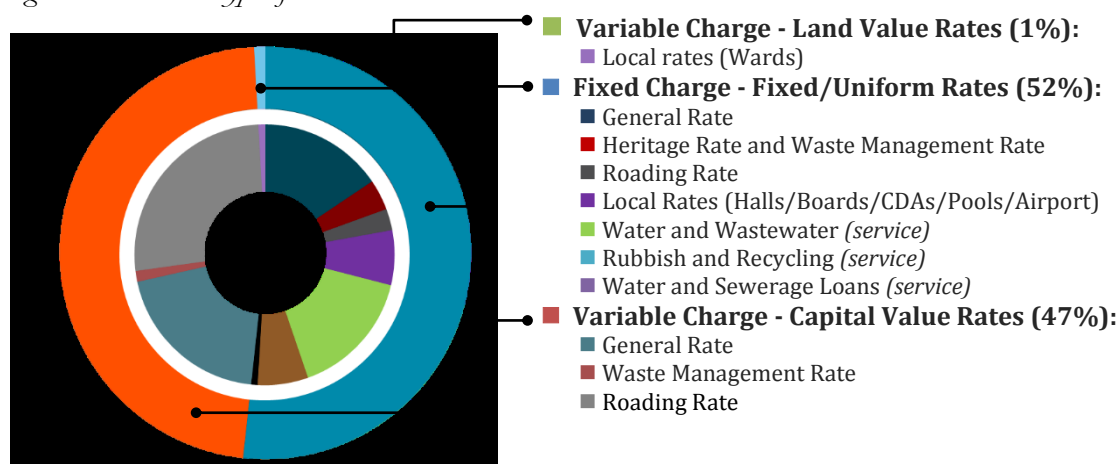
¹³ Shand, Horsley, Cheyne (2007) Funding Local Government (Local Government Rates Inquiry)

being targeted and reduce rates for those properties not targeted. An example of this would be moving portions of the general rate to a targeted rate against specific properties or introducing differentials for commercial or rural properties;

- c) changing who pays current targeted rates and the catchments in which rates are charged which would either reduce rates by sharing costs out over a greater number of properties or increase rates for properties those in areas with very low costs. An example of this is the clubbing together of water and wastewater rates for those connected rather than each community paying their own scheme costs or replacing current local community board and CDA rates with a single community board rate that covers the whole board area (rather than only township area).

- 148 Council's rating system is currently made up of 151 individual rates; some are fixed while others vary according to a property's land or capital value. Council also has some usage-based charges (e.g. volumetric water charging).
- 149 Fixed charges make up 52% of all rates collected by Council with 48% based on property value (47% capital value; 1% land value). Figure 5 shows the breakdown of Council's 2019/2020 rates. The outer circle shows the proportion of rates collected on the basis of fixed charges, capital value and land value. The inner circles shows the type of rates within these rating methods.

Figure 5: Basis and type of rates



- 150 Table 4 shows the median fixed charge, median service fixed charge and median variable value based charges paid by each landuse sector. The variations in fixed charges between sectors relate to differences in the services provided in different areas as well as the number of units charged. Variations in the value-based charges is generally related to the property's value.

Table 4: Median Rates by Rate Basis and Landuse

	(A) Median Fixed Charges (excluding service charges) (incl GST)¹		(B) Median Service Fixed Charges (incl GST)		(C) Median Variable Charges (incl GST)¹		(D) Total (incl GST)
Residential	\$1,077	43%	\$1,224	48%	\$232	9%	\$2,533
Farming	\$856	25%	\$322	10%	\$2,194	65%	\$3,372
Dairy Farming	\$966	9%	\$645	6%	\$9,527	85%	\$11,138

	(A) Median Fixed Charges (excluding service charges) (incl GST) ¹		(B) Median Service Fixed Charges (incl GST)		(C) Median Variable Charges (incl GST) ¹		(D) Total (incl GST)
Lifestyle	\$947	57%	\$322	20%	\$375	23%	\$1,644
Commercial	\$1,087	38%	\$1,224	43%	\$550	19%	\$2,861
Industrial	\$1,038	46%	\$902	40%	\$301	14%	\$2,241
Forestry	\$771	22%	\$353	10%	\$2,398	68%	\$3,522
Other	\$904	49%	\$902	49%	\$37	2%	\$1,843
Mining	\$790	20%	\$2,145	56%	\$927	24%	\$3,862
Total	\$1,025	40%	\$1,224	47%	\$333	13%	\$2,582

1 – Column A includes fixed charges for the Te Anau and Tuatapere Community Board differentials. Please note that in Table 5 below, because these rates are set on a differential basis, they are not included in the calculation of the 30% cap and as such are reported in column C in Table 5 rather than column A.

151 The type of rates include those for:

- district activities like roading, heritage and waste management and general rates that all properties pay. The median fixed charge for these rates totals \$759. The median capital value portion for these rates is \$329 with the range of individual rates varying from \$2 to \$312,000 depending on property value and the majority of these value based rates sitting between \$2-\$650.
- local activities like halls, community board/CDA rates, pools and wards that some properties pay depending on the area the property is in and the activities provided in this area. The median local fixed charge is \$266 however these fixed charges range between \$4 to \$986 per property depending on the activities in the area and the number of units charged. The median land value portion for the ward rate is \$4 with the range of individual rates varying from \$1 to \$3,400 and the majority of these value based rates sitting below \$6.
- services like water, sewerage and rubbish/recycling that some properties pay depending on the service they receive and their level of usage. While the median service fixed charge is \$1,224, these charges range between \$44 to \$70,000 depending on the number of units charged and/or usage and whether any water/sewerage loan repayments are included.

152 Table 5 shows the total rates collected for each landuse sector as either a fixed charge excluding service charges (column A), service fixed charges for water, wastewater, and wheelie bin collections (column B) or variable charges based on property value or for certain differentials (column C).

Table 5: Total Rates by Rate Basis and Landuse

	(A) Total Fixed Charges (excluding service charges) (millions, incl GST) ¹		(B) Total Service Fixed Charges (millions, incl GST)		(C) Total Variable Charges (millions, incl GST) ¹		(D) Total (millions, incl GST)
Residential	\$8.25 m	42%	\$8.42 m	43%	\$3.06 m	16%	\$19.73 m
Farming	\$2.47 m	18%	\$0.83 m	6%	\$10.64 m	76%	\$13.95 m

	(A) Total Fixed Charges (excluding service charges) (millions, incl GST)¹		(B) Total Service Fixed Charges (millions, incl GST)		(C) Total Variable Charges (millions, incl GST)¹		(D) Total (millions, incl GST)
Dairy Farming	\$0.81 m	8%	\$0.35 m	3%	\$9.11 m	89%	\$10.27 m
Lifestyle	\$2.29 m	53%	\$0.67 m	15%	\$1.40 m	32%	\$4.36 m
Commercial	\$0.46 m	18%	\$1.29 m	52%	\$0.72 m	29%	\$2.46 m
Industrial	\$0.32 m	24%	\$0.33 m	24%	\$0.70 m	52%	\$1.35 m
Forestry	\$0.12 m	11%	\$0.00 m	0%	\$0.98 m	89%	\$1.11 m
Other	\$0.27 m	30%	\$0.49 m	53%	\$0.16 m	17%	\$0.92 m
Mining	\$0.01 m	5%	\$0.00 m	1%	\$0.28 m	94%	\$0.30 m
Total	\$15.01 m	27.6%	\$12.38 m	22.7%	\$27.05 m	49.7%	\$54.44 m

1 – Column A excludes fixed charges for the Te Anau and Tuatapere Community Board differentials with these included in column C because these rates are set on a differential basis and are not included in the calculation of the 30% cap.

- 153 Under Section 21 of the Local Government (Rating) Act Council is restricted to collecting a maximum of 30% of rates revenue from uniform charges. This includes the uniform annual general charge as well as uniform targeted rates that apply across the district (noting that this excludes certain uniform targeted rates such service rates like water, wastewater and wheelie bin collections).
- 154 The cap limits the potential impact that fixed charges have on the overall rating burden for low-income households and was intended to prevent the rating system being too regressive.
- 155 Column A in Table 5 represents the rates that are used to calculate the 30% cap. While overall Council is below the 30% cap, residential and lifestyle landuse sectors pay more than 30% of total rates (excluding service charges) on a uniform basis (42% and 53% respectively). In addition, when fixed service rates are included, the proportion of rates collected on a uniform basis are closer to 90% for residential properties.
- 156 This suggests that the distribution of rates could be considered to be too regressive for these sectors with low income households in these areas more likely to be experience rates affordability pressure as a result. Taking this into account, there may be an argument for Council making a greater use of value-based rates rather than uniform/fixed charges in the residential/lifestyle area and/or overall.
- 157 In saying this, it is also important to note that some members of the community believe that it is “fairer” for households to pay the same amount for Council’s services – irrespective of their property value. For example, during recent workshops with Council’s Community Boards, members of the boards have generally expressed a preference for setting local rates on a fixed basis versus using property value noting that they see this as “fair”.
- 158 With around half of Council’s rates being set on a fixed basis and half on a property value basis – there may also be an argument that the current mix of rates is appropriate.

B. Targeting rates assistance for low income households (distributional affordability)

- 159 Some councils provide specific rate remissions aimed at assisting low income households or households facing financial hardship. These tend to be focussed on providing support for

residential ratepayers with low incomes and extend the support already provided by the government rate rebate scheme. This approach enables any support to be targeted to those in need based on their individual financial circumstances.

- 160 Some councils also provide rate postponement and/or reverse equity schemes to assist people with short-term income affordability issues or to assist “asset rich/income poor” households like retirees. These work by reducing rates now with rate payments deferred to a future date – often linked to the sale of the property, death of the ratepayer, ratepayer no longer residing at the property or at a date agreed with Council.
- 161 These forms of assistance increase the amount of rates needed overall and/or shift the rating burden to other ratepayers.
- 162 Both Kapiti Coast District Council and Hamilton City Council offer remissions specifically for low income households.
- 163 With Kapiti Coast, an annual amount is included in Council’s overall budget for rates assistance (fixed at around \$200,000) to support low income ratepayers (including on behalf of tenants) facing challenges paying their rates. Here Council contributes up to \$300 in support for ratepayers where rates are more than 5% of net household income (theirs, their tenants or licensee) after any government rate rebate (up to \$640). The income threshold (\$34,000) means that remissions are available to people who don’t qualify for a central government rebate, but still have rates greater than 5% of income.
- 164 This assistance is also available to ratepayers who own rental properties with tenants facing financial difficulties or to ratepayers who jointly own licenses to occupy (e.g. retirement villages whose licensees face financial difficulties).
- 165 Their aim is to reduce rates much closer to, or even below, 5% of household income.
- 166 Figure 6 shows the combined impact the government’s rebate and the Kapiti Coast’s additional rate assistance on low income areas in Kapiti Coast in 2017/2018.

Figure 6: Kapiti Coast District Council low income rebate/remission example

	Median income	Median rates	Rates % of income	Gov’t rebate	Council remission	Rates after reb/rem	New rates % of income
Ōtaki	27,500	2,208	8.0%	\$620	\$175	\$1,413	5.1%
Waikanae West	22,500	2,555	11.4%	\$620	\$250	\$1,685	7.5%
Paraparaumu Central	23,800	2,230	9.4%	\$620	\$175	1,435	6.0%
Waikanae West	37,500	2,621	7.0%	\$100	\$175	2,346	6.3%

- 167 Hamilton City Council provide a council rates rebate (alongside government rates rebate) for owner occupied residential properties where the ratepayer is facing financial difficulties. They provide a maximum remission of \$529 with a basic allowable income factor set at \$24,882.
- 168 In Southland, once the government rates rebate is taken into account (and assuming all low-income properties are entitled to the rebate), rates in low income areas are generally much closer to, or even below, 5% of household income (Table 6 column G). The gap would reduce even further if Council provided additional assistance to low income households in the form of additional

rebates/remissions. For example, if Council provided \$300 in rates assistance to low income households, only one area unit would have household rates slightly above 5% of household income (column J).

Table 6: Southland District low income remission example

(A)	(B)	(C)	(D)	(E)	(F)	(G)	(H)	(I)	(J)
Area Unit	Median Household Income (HHI)	Median Rates 2019	Rates % HHI	less Govt Rate Rebate	Rates (after rebate)	Rates % HHI (after rebate)	less Low Income Remission (example)	Rates (after remission)	Revised Rates % HHI
Ohai ^(U)	\$30,427	\$2,527	8.31%	\$640	\$1,887	6.20%	\$300	\$1,587	5.22%
Riverton East ^(U)	\$38,946	\$2,731	7.01%	\$640	\$2,091	5.37%	\$300	\$1,791	4.60%
Nightcaps ^(U)	\$36,844	\$2,509	6.81%	\$640	\$1,869	5.07%	\$300	\$1,569	4.26%
Tuatapere ^(U)	\$46,470	\$2,624	5.65%	\$640	\$1,984	4.27%	\$300	\$1,684	3.62%

- 169 If Council wanted to consider this option, more detailed investigations would need to be carried out into the level of remission and impact that the remission would have on other ratepayers.

C. Reducing the amount of rates needed (aggregate affordability)

- 170 This would involve reducing the amount of rates funding needed by either:
- reassessing the activities/levels of service that Council provides to reduce expenditure and therefore the level of rates needed as part of the 2021 Long Term Plan; and or
 - increasing the amount of income from non-rates revenue (such as fees and charges or alternative income streams such as investments) to reduce the level of rates needed.
- 171 The impact that this would have on rates would depend on which activities are adjusted and which ratepayers pay rates for these activities. For example, if changes were made roading, as a district-wide rate all ratepayers would be impacted, compared to a local rate like a hall rate – only those ratepayers paying for that hall would see the benefit.

Factors to Consider

Legal and Statutory Requirements

- 172 The Local Government Act 2002 places a number of obligations on local authorities when managing their financial dealings. These are:
- managing all financial dealings prudently and in the current and future interests of the community including ensuring that adequate provision is made to meet expenditure needs (section 101)
 - making all funding decisions following a two-step funding process that involves consideration of a set of funding principles to determine appropriate funding sources for activities and then considering the impact that the resulting allocation of revenue liability has on current and future community wellbeing (section 101(3))
 - preparing a financial strategy (section 101A) that facilitates prudent financial management by guiding funding and expenditure proposals and making transparent the overall effects of those proposals on the services, rates, debt, and investments
 - providing predictability and certainty about funding through the adoption of a set of funding and financial policies (section 102)
 - running a balanced budget where operating revenues are sufficient to meet operating expenses (section 100).

- 173 The core concepts are established in section 101 and 101A which inform the financial policies in section 102 and are reinforced by the balanced budget test in section 100.
- 174 The key aspects are around Council managing its financial dealings in a prudent and sustainable manner and involves ensuring that the community has the financial capacity to meet Council's financial needs.
- 175 One of the key policies that Council uses to enact its financial management obligations is the Revenue and Financing Policy (section 103). The policy must outline Council's approach to funding its operating and capital expenses from a range of sources including:
- general rates, including choice of valuation system and differential rating; and uniform annual general charges (s103(1)(2)(a))
 - other sources including targeted rates, lump sum contributions, fees and charges, interest and dividends from investments, borrowing, proceeds from asset sales, development contributions, financial contributions, grants and subsidies, any other source (s103(1)(2)(b-j))
- 176 Council must also show how it has, in relation to the sources of funding identified in the policy, complied with section 101(3) in determining what the appropriate way to fund activities including through rates. The section requires that Council consider –
- (a) *in relation to each activity to be funded,—*
- (i) *the community outcomes to which the activity primarily contributes; and*
 - (ii) *the distribution of benefits between the community as a whole, any identifiable part of the community, and individuals; and*
 - (iii) *the period in or over which those benefits are expected to occur; and*
 - (iv) *the extent to which the actions or inaction of particular individuals or a group contribute to the need to undertake the activity; and*
 - (v) *the costs and benefits, including consequences for transparency and accountability, of funding the activity distinctly from other activities; and*
- (b) *the overall impact of any allocation of liability for revenue needs on the current and future social, economic, environmental, and cultural well-being of the community*
- 177 Council's Revenue and Financing Policy, Rates Remission and Postponement Policies and methods of rating all give effect to these considerations in some way.
- 178 Sections 101(3)(a)(ii)(iv)(v) and 101 (3)(b) have useful considerations for Council to take into account when making rating decisions including determining what rates might be needed and who should pay them as well as what adjustment, if any, might be needed to ensure that rates are affordable or support community wellbeing aims.

Community Views

- 179 At this stage community views have not been sought about the assessment of rates affordability.
- 180 The community generally expects Council to operate in a financially prudent manner which includes ensuring that services are delivered and rated for in a financially sustainable and affordable way.
- 181 Council regularly hears concerns about the affordability of rates. Some people on low and fixed incomes struggle to pay their rates and some people with high rates (typically caused by high

capital values, differentials or multiple charges) think what they pay bears no relation to their use of the services or the benefit they receive.

- 182 Community feedback about the appropriateness and fairness of rating tends to be dominated by people's assessment of their individual rate bills rather than an assessment community-wide.
- 183 There is no perfect rating system and councils throughout the country all take different approaches to rating.
- 184 Council must make its own judgements around what is appropriate, sustainable and affordable and there is an opportunity for the community views to be heard about this during consultation over related plans and policies including Revenue and Financing Policy, Rate Remission and Postponement Policy, Annual/Long Term Plan budgets and Rating Policies.
- 185 While the community will have the opportunity to have an input into these policy decisions, the final responsibility for the decisions on how Council funds its activities (and sets its rates and level of rates) sits with Council.

Costs and Funding

- 186 The cost of the analysis is included in the 2019/20 budget and work programme.
- 187 At this stage, guidance is being sought from Council about whether it wants to respond to the assessment of rates affordability in any way.
- 188 If so, the costs and financial implications of any changes to the way activities are funded and rated for will be further quantified as part of the review of the Revenue and Financing Policy, Rate Remission and Postponement Policy and/or rating policy.

Policy Implications

- 189 At this stage, guidance is being sought from Council about whether it wants to respond to the assessment of rates affordability in any way. If so the relevant policy implications will be worked through as part of review of Revenue and Financing Policy, Rate Remission and Postponement Policy and/or rating policy.

Analysis

Options Considered

- 190 The options are for Council to receive the rates affordability assessment and take no further action or receive the rates affordability assessment and identify the nature of any rate affordability issues that need to be specifically considered during the upcoming review of the relevant policies and plans (including Revenue and Financing Policy, Rates Remission and Postponement Policy, Rating Policies and Long Term Plan).
- 191 If changes are sought, it is important that members clarify and agree the outcomes that they are seeking for the community or parts of the community so that staff can look at options for changes that are in line with elected members thinking as part of these reviews.

Analysis of Options

Option 1 – Receive the rates affordability assessment and take no further action

<i>Advantages</i>	<i>Disadvantages</i>
-------------------	----------------------

<ul style="list-style-type: none"> signals that council is generally comfortable with the affordability of its current approach to rating/funding avoids shifts in rating burden which may have an impact on the community enables policy review work to progress on the basis of achieving similar outcomes to what is currently in place. However this notes that there are separate issues which have already been identified (such as Stewart Island sustainability review) which may result in some changes to current rating as policy review progresses 	<ul style="list-style-type: none"> rates affordability will likely remain unchanged with affordability issues in some pockets of the community and a potential deepening of these given the regressive nature of the current rating approach
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Option 2 – Receive the rates affordability assessment and request further investigation be carried out into the feasibility of development a rate remission/postponement for low income households as part of the review of the Rate Remission and Postponement Policy.

<i>Advantages</i>	<i>Disadvantages</i>
<ul style="list-style-type: none"> signals that council's main concern about rates affordability is related to low income households enables options for targeted assistance to be considered with clear outcomes avoids creating new rating issues that may result from broader changes to the Council's rating policies and structure ensures that any assistance provided will be based on actual information about the individuals circumstances rather than grouped data and assumptions could supplement the existing rate rebates scheme and provide support for renting households which are currently not covered 	<ul style="list-style-type: none"> depending on how funding for the assistance will be collected - could result in shifts in the rating burden which will affect parts of the community where their shares of rates is increased could be create additional administration time/cost for processing and assessing applications application process may create barriers for low income householders accessing support given typically low housing costs in Southland compared to other regions

Option 3 – Receive the rates affordability assessment and identify other methods that Council would like to investigate to address any rate affordability issues that need to be specifically considered during the upcoming review of relevant policies and plans.

<i>Advantages</i>	<i>Disadvantages</i>
<ul style="list-style-type: none"> signals that council has concerns about rates affordability and provides more context around what the specific concerns are and what outcomes they want to see for 	<ul style="list-style-type: none"> the work will need to be progressed in a timely way to inform the policy reviews and

the community which be incorporated into the forward work programme to look at options for addressing these	be in place for the 2021 LTP rating processes <ul style="list-style-type: none">• will likely result in shifts in the rating burden which will affect parts of the community where their shares of rates is increased• limitations on the information available, particularly around accessing accurate household and business income/wealth/cost data means that there is a risk that the assessment has information gaps or makes assumptions which don't reflect the actual circumstances
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Assessment of Significance

- 192 In this report Council is being asked to receive the rate affordability assessment and provide guidance to staff on whether it wants to responds to the assessment findings in any way.
- 193 While there is potential for any further work to lead to what might be seen as significant changes in rating for parts of the community, the decision to receive the report and determine the next steps is not itself a significant decision. The significance will follow as part of the policy reviews and options for making changes.

Recommended Option

It is recommended that is option 2 - Receive the rates affordability assessment and request further investigation be carried out into the feasibility of development a rate remission/postponement for low income households as part of the review of the Rate Remission and Postponement Policy

Next Steps

- 194 Council staff will incorporate the feedback into the review work being progressed on the Revenue and Financing Policy, Rate Remission and Postponement Policy and/or rating policy as required.

Attachments

- A 2019/2020 Southland District Rates Affordability Assessment (Attachment A) [↓](#)
- B Table 1 - 2019/2020 Southland District Household Rates Affordability (Attachment B) [↓](#)



Assessing Southland rates affordability

Supporting information

June 2020

Southland District Council
Te Rohe Pōtae o Murihiku

PO Box 903
15 Forth Street
Invercargill 9840

0800 732 732
@ sdc@southlanddc.govt.nz
🏠 southlanddc.govt.nz

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Introduction

Affordability of Council services (and subsequently rates) has been identified as a key challenge for Council. With the cost of replacing ageing infrastructure and meeting higher environmental standards, the ability of the District's relatively small and geographically dispersed population to pay for rates is an important consideration.

To provide some context around the affordability of rates, Council has put together an information model which provides a baseline picture of rates affordability for households and industry/business across the District in 2019/2020. This information has been developed from the information that is available for the Southland community in 2019 in addition to rating information from Southland District Council and Environment Southland for the 2019/2020 year.

This information is intended to provide background and contextual information over time rather than a precise measure of individual rates affordability given the limitations of the information available. In preparing this information Council also notes that the circumstances of individual households can also have a significant impact on their ability to pay rates including:

- the level of disposable household income (gross income less tax)
- housing costs (eg rent, mortgage payments, insurance and rates)
- household size and composition (eg number/age of dependents)
- essential living costs (eg electricity, food, clothing, transport, heating)
- household wealth (property, financial assets and other non-financial assets)
- nature of Council services that the property receives/pays for and how rates for these are charged

However, because this information is not readily available for Southland District and its constituent board areas and/or townships (typically more for the South Island or Southland Region), Council has presented the information it currently has available keeping in mind that the model can be adapted and expanded when more detailed data becomes available for individual communities.

Despite these limitations, Council does recognise that there are pockets of the community, particularly those with low/fixed household incomes, where affordability is likely to be an issue.

Summary of findings

Households

The '2007 Independent Inquiry into Local Government Rates (known as the Shand report) suggested a measure of rates affordability where rates make up no more than 5% of household income. Council has used this benchmark along with a range of other indicators in this review to identify areas where rates affordability may be an issue.

To help understand affordability issues across Southland District:

- compared median rates bills (Environment Southland and Southland District Council) with median household income to see how the ability to pay rates varies across different areas and properties in the district
- looked for trends in areas that might impact rates affordability, including where there is a higher proportion of low income households, rates above the median/average and property values lower than the median
- identified areas with a greater share of properties receiving a rate rebate to help identify areas with home owners on a low income
- identified areas with an over representation of properties with rate arrears as an indication of difficulty paying rates
- identified areas with a disproportionate number of people receiving the government's accommodation supplement as an indicator of housing cost pressure
- looked at the NZ Deprivation Index which measures socioeconomic deprivation to identify areas with a greater likelihood of experiencing social, economic and health disparities
- compared total rates with gross domestic product (GDP) as an indicator of overall capacity to pay

Table 1 on page 5 provides an overview of the findings on an area unit basis for households (explained in more detail on page 12). An overview of the Southland District is also included from page 10, however greater context variation can be seen in the 34 area unit summaries which are included from page 16 under each community board area.

The analysis showed that some parts of the District, in particular the urban areas of Ohai, Nightcaps, Riverton, Otautau, Wyndham, Lumsden not only had rates more than 5% of household income, but also triggered several other affordability indicators. This is shown by the shading for each indicator across areas units in Table 1 - the darker shading across more columns suggests a greater likelihood of affordability issues. This is usually because of lower income levels rather than higher rates (although the higher proportion of fixed rates in these areas plays a contributing role).

In addition, the initial rates affordability analysis shows some rural areas (Wairio, Kaweku and Fairfax) where median rates are more than 5% of median household income. However this is largely a result of higher property values resulting in higher rates, with few other affordability indicators showing.

Based on this analysis it is estimated that between 800 to 1,900¹ households may be experiencing rate affordability issues. This is before any rebates have been applied.

To see how rates as a percentage of median household income varies across the district, the area unit map (on page 11) shows the median income compared with median rates data for 2019/2020. In addition, each area unit is made up of a number of meshblocks and rates affordability data has also been prepared for these meshblocks to show the spread of rates affordability within each area unit. The meshblock map (on page 11) provides an overview of this with more detail provided in the data tables within each area unit summary.

¹ This estimate is based on the number of rating units in meshblocks with household income less than \$33,000 and rates over \$1,650 (5% of the \$33,000)

Assessing Southland rates affordability

Table 1: Southland Residential Household Rates Affordability Summary by Area Unit

Area Unit	Rates % household Income	Median household Income	Rates 2019 (SDC and ES)			Usually resident population (2013)	Number of HOUSEHOLDS (2013)	Number of rating units (selected)	Median property value (selected)		2018 NZ deprivation index 1 (least)-10 (most)	Low income households (HH)		Rate arrears		Rate rebates		Accommodation supplement	
			Median	Average	Total (\$m)				Capital Value	Land Value		% HH over AU share	% AU HH income under \$33k	% rating units over AU share	% AU rating units in arrears	% rating units over AU share	% AU rating units with rebate	% pop. over AU share	% AU pop. with supplement
Wairio ^(R)	10.19%	\$71,364	\$7,275	\$9,480	\$2.3	942	354	243	\$3.52m	\$2.88m	6		10-20%		5-10%		<5%		<3%
Ohai ^(U)	8.31%	\$30,427	\$2,527	\$2,533	\$0.4	303	126	151	\$57k	\$15k	9	1-2%	30+	2-3%	15%+	3-6%	10-15%	2-3%	7%+
Kaweku ^(R)	7.11%	\$88,072	\$6,262	\$8,364	\$1.4	567	204	166	\$2.92m	\$2.39m	5		<10%		<5%		<5%		
Riverton East ^(U)	7.01%	\$38,946	\$2,731	\$2,765	\$0.6	435	192	204	\$213k	\$57k	8	2-3%	30+	0<1%	5-10%	<3%	5-10%	2-3%	5-7%
Nightcaps ^(U)	6.81%	\$36,844	\$2,509	\$2,525	\$0.4	294	135	153	\$80k	\$22k	10	1-2%	30+	1-2%	10-15%	3-6%	10-15%	2-3%	7%+
Riverton West ^(U)	5.74%	\$51,559	\$2,959	\$3,015	\$2.5	999	459	823	\$360k	\$173k	6	2-3%	20-30%	1-2%	5-10%	3-6%	5-10%	2-3%	3-5%
Tuatapere ^(U)	5.65%	\$46,470	\$2,624	\$2,655	\$0.7	558	246	261	\$141k	\$32k	8	1-2%	20-30%	2-3%	15%+	6-10%	10-15%	2-3%	5-7%
Manapouri ^(M)	5.40%	\$55,764	\$3,010	\$3,206	\$0.8	228	105	244	\$315k	\$121k	4	<1%	20-30%		5-10%		<5%	<1%	3-5%
Wyndham ^(U)	5.35%	\$58,087	\$3,108	\$2,984	\$0.7	534	222	232	\$120k	\$17k	8	1-2%	20-30%	3%+	15%+	3-6%	5-10%	3-4%	7%+
Fairfax ^(R)	5.30%	\$84,863	\$4,499	\$7,340	\$3.7	1,908	693	510	\$1.97m	\$1.58m	5		10-20%		<5%		<5%		<3%
Otautau ^(U)	5.09%	\$52,887	\$2,694	\$2,707	\$0.9	669	291	320	\$185k	\$20k	8	1-2%	20-30%	2-3%	10-15%	3-6%	5-10%	5-6%	7%+
Lumsden ^(U)	5.06%	\$53,108	\$2,686	\$2,703	\$0.6	405	177	220	\$180k	\$29k	8	1-2%	20-30%	2-3%	10-15%	<3%	<5%	1-2%	5-7%
Te Anau ^(U)	4.96%	\$62,513	\$3,100	\$3,195	\$4.7	1,911	813	1,469	\$390k	\$155k	4	1-2%	10-20%		<5%		<5%		<3%
Winton ^(U)	4.66%	\$58,530	\$2,729	\$2,784	\$3.0	2,211	957	1,074	\$260k	\$99k	6	4%+	20-30%		5-10%	10%+	5-10%	6-7%	3-5%
Balfour ^(U)	4.51%	\$55,985	\$2,526	\$2,453	\$0.2	126	54	64	\$158k	\$20k	2	<1%	20-30%		5-10%	<3%	<5%		
Mararoa River ^(R)	4.08%	\$83,314	\$3,397	\$6,981	\$3.9	1,587	594	552	\$965k	\$390k	3		<10%		<5%		<5%		<3%
Stewart Island ^(U)	3.95%	\$59,526	\$2,353	\$2,479	\$0.8	381	171	334	\$310k	\$126k	5	1-2%	20-30%		<5%		<5%		<3%
Milford ^(U)	3.91%	\$52,555	\$2,054	\$2,283	\$0.05	117	30	20	\$673k	\$570k	3				<5%				
Toetoes ^(R)	3.86%	\$71,033	\$2,742	\$4,551	\$2.8	1,647	582	624	\$945k	\$640k	5		10-20%		5-10%		<5%		<3%
Mossburn ^(M)	3.84%	\$58,973	\$2,262	\$2,755	\$0.3	210	87	97	\$165k	\$20k	5		10-20%	<1%	5-10%	<3%	<5%	<1%	<3%
Edendale ^(U)	3.63%	\$74,241	\$2,697	\$2,884	\$0.7	555	231	253	\$220k	\$67k	5	<1%	10-20%		5-10%	<3%	<5%	<1%	3-5%
Riversdale ^(U)	3.40%	\$63,619	\$2,165	\$2,175	\$0.4	372	159	185	\$200k	\$29k	5		10-20%	<1%	5-10%		<5%		<3%
Waituna ^(R)	3.29%	\$85,416	\$2,808	\$6,595	\$3.1	1,683	612	466	\$1.05m	\$785k	4		<10%		5-10%		<5%		<3%
Waikaia ^(R)	3.15%	\$74,352	\$2,340	\$6,823	\$4.5	1,656	642	663	\$560k	\$220k	5		10-20%		5-10%		<5%		<3%
Te Waewae ^(R)	3.13%	\$65,168	\$2,043	\$4,396	\$2.7	1,380	534	604	\$465k	\$185k	6	1-2%	20-30%	<1%	5-10%		<5%		<3%
Hokonui ^(R)	2.98%	\$87,850	\$2,615	\$5,665	\$5.3	3,087	1,089	939	\$840k	\$275k	4		<10%		5-10%		<5%		<3%
Wallacetown ^(U)	2.89%	\$78,999	\$2,281	\$2,353	\$0.6	663	243	263	\$255k	\$56k	4		10-20%	1-2%	10-15%	<3%	<5%		<3%
Dacre ^(R)	2.53%	\$93,161	\$2,356	\$5,309	\$2.7	1,617	579	504	\$933k	\$535k	4		<10%		5-10%		<5%		<3%
Woodlands ^(U)	2.46%	\$71,918	\$1,769	\$2,789	\$0.3	264	111	111	\$340k	\$80k	4		10-20%		5-10%	<3%	<5%		<3%
Waianiwa ^(R)	2.29%	\$85,748	\$1,966	\$4,617	\$2.9	1,968	711	620	\$603k	\$228k	4		<10%		5-10%		<5%		<3%
Makarewa North ^(R)	1.74%	\$90,727	\$1,579	\$1,780	\$0.2	327	120	129	\$475k	\$170k	2		10-20%		<5% ^o		<5%		
Southland	3.95%	\$70,590	\$2,789	\$4,317	\$54.0	29,613	11,523	12,498	\$365k	\$143k									

1 – These figures have been obtained by calculating the weighted average deprivation score for Statistical Area 1 areas contained within the specified area unit. Note – the NZDep2018 figures are from the December 2019 Interim Research Report.

(U) denotes a mainly urban area; (R) denotes a mainly rural area; (M) denotes a mix of urban and rural areas

Community

At an overall level, rates as a % of Gross Domestic Product (GDP) also provides an indication of the overall community capacity to pay rates. The Ministry for Business, Innovation and Employment has developed Modelled Territorial Authority GDP data which estimates of the gross domestic product (GDP - the value of goods and services) produced within each territorial authority area. Using the modelled GDP data for Southland in 2018, rates (ES and SDC) for all land use types are around 3%² of Southland GDP. An analysis of other district council's shows rates as a % of GDP ranging from 2%-5%.³

Industry/business

Industry/business capacity to pay rates can be considered using modelled territorial authority GDP data where rates for each industry type can be considered against the GDP (value of goods and services produced) for each industry sector. This provides a loose substitute for being able to measure rates as a % of median profit/income levels for Southland businesses given the restrictions currently in place for accessing this information from the Statistics NZ's longitudinal business database.

Table 2 below shows data for rates (ES and SDC) as a percentage of GDP for different industries within Southland. The analysis indicates that in Southland District, overall industry rates make up 2.1% of GDP with individual industry classifications either at or well below 5%.

Table 2: Southland industry/business rates affordability summary

Industry grouping ⁴	2018 GDP ⁵ ('000)	Rates ('000) (ES + SDC)	Rates % GDP
Agriculture	\$672,626	\$33,434	5.0%
Manufacturing	\$384,472	\$1,497	0.4%
Forestry, Fishing Mining, Utilities	\$229,379	\$1,830	0.8%
Commercial – Trade and Transport	\$227,538	\$954	0.4%
Commercial – Other	\$259,497	\$415	0.2%
Accommodation	\$31,466	\$1,108	3.5%
Education and Training	\$40,181	\$185	0.5%
Health and Social Assistance	\$18,997	\$170	0.9%
Public Administration and Safety	\$9,948	\$507	5.1%
Total (excluding GST on Production, Import Duties and Other Taxes)	\$1,874,104⁶	\$40,098	2.1%

The agriculture industry sits at 5% having both the highest GDP (\$673m) and rates (\$33m) of all industry sectors with 53% of the rates for this industry associated with pastoral fattening and 41% with dairy farming. Given the large land areas involved, agriculture typically has higher land/capital values which means this sector pays a larger portion of value-based rates resulting in the higher rates as a percentage of GDP.

Public administration and safety (which includes local government administration and central government administration, defence and public safety) is the only industry with rates as a % of GDP over 5%. By nature these activities are likely to have relatively low GDP figures, however this sector is likely to have comparably high levels of rates because the properties included in the analysis have high capital values or have larger land areas and therefore pay more in value-based rates. In addition, a large proportion of these properties (between 32-40%) pay fixed service rates (for wastewater, water and rubbish/recycling collection) which also contributes to the rating level of this industry group.

² 2018 MBIE Modelled GDP Southland District: \$2.025 billion; 2019 Total Rates: \$66.6 million (includes all landuse sectors)

³ Invercargill City (2%), Gore District (3%), Clutha (3%), Waitaki District (3%), Waimate District (4%), Timaru District (2%), Manawatu District (4%), Horowhenua District (4%), South Taranaki District (2%), Masterton District (4%), Whanganui District (4%)

⁴ Details of the approach taken to assigning rates to GDP groupings based on GDP classifications is explained on page 23.

⁵ At the time of writing 2018 Modelled GDP data was only available for Southland District at a total level (not by industry classification). For the purposes of this modelling, industry shares have been estimated using the average of published figures for each industry classification between 2015-2017.

⁶ GST on Production, Import Duties and Other Taxes (\$151 million in 2018) has not been in the industry analysis as it cannot be allocated specific industry groups. This accounts for variation between table total and total Southland District GDP (\$2.025 billion).

Rates affordability analysis

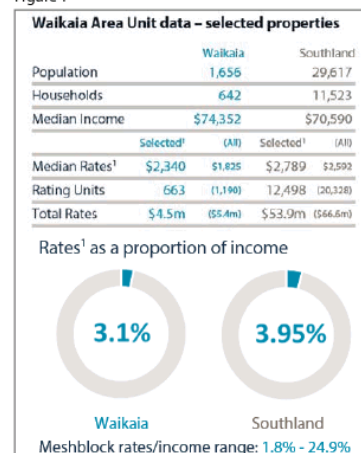
Households - overview of information provided

An analysis of household rates affordability has been undertaken at area unit⁷ level and set out for each of the nine community board areas. The following pages provide an explanation of the information for both Southland District (page 10) and for each community board area (page 16 to 152).

1) Median rates as a percentage of median household incomes

Summary information for each area unit (Figure 1) shows median rates (ES and SDC), median household income, population and number of households compared to Southland district. The data also shows number of rating units and total rates for both selected properties (those chosen for the household analysis as per the methodology explanation on page 22) and all properties in the area. The *2007 Independent Inquiry into Local Government Rates* introduced an approximate threshold of rates affordability as being where rates exceed 5% of gross household income. The analysis in this document shows the range of rates affordability, with 5% set as the level at which rates start to become less affordable. While median figures have been used for income, the range of rates and income has also been included to give more context. The pie charts show median rates as a percentage of median household incomes for selected properties in the area unit compared to Southland District. The variations between meshblocks in the area unit are shown by the rate/income ranges below the charts. More detailed information about the range of rates affordability values has been included for each of the meshblocks in the area unit - see 8) *Meshblock data* on page 9 for details.

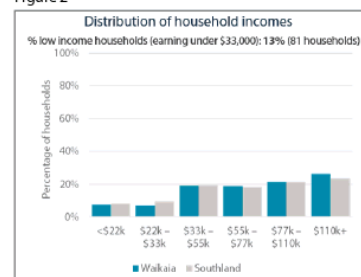
Figure 1



2) Distribution of household income

The distribution of household incomes in Figure 2 shows the proportion and number of households in various income brackets. This provides a picture of the range of incomes in the area unit and gives an idea of the type of incomes above and below the median. The analysis for each area unit (blue column) compares to Southland (grey column).

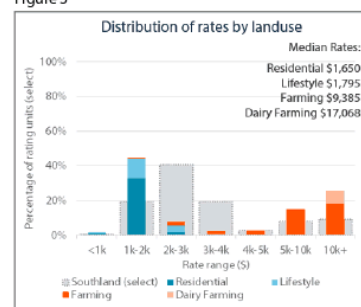
Figure 2



3) Distribution of rates by land use

The distribution of rates (ES and SDC) by land use in Figure 3 shows the proportion of properties that pay different ranges of rates. The colour on the columns shows mix of land use in each of these rate ranges. This gives an idea of the spread of rates paid compared to the median and also variations in rates paid by the different land use types and compared to Southland District (grey columns). Median rate amounts for each land use groups within the area unit have also been noted.

Figure 3



4) Distribution of property values by land use

The distribution of capital value in Figure 4 (following page) shows the proportion of rating units in different capital value ranges for selected properties. Capital value has been looked at because it is the main tool used by Council for setting value-based rates. This data also shows the mix of land use in each value group the median capital value for each group.

The capital value of the property is one determinant of the amount of rates paid, particularly for rural properties. The area unit analysis compares to Southland District (grey columns).

⁷ As at 1 January 2018, the area unit classification has been replaced by the statistical area 2 (SA2) classification. However given that 2018 Census data for income was not available at the time of writing, area unit income data from the 2013 Census has been used in this analysis. It is intended that future analysis be prepared at SA2 once household income data for this is available.

5) Rates paid and number of rating units

The breakdown of total rates (ES and SDC) paid (left chart) and number of rating units (right chart) in Figure 5 has been shown for the selected properties (used to calculate the median rates) as well as all properties in the area unit. This data also shows the mix of land use type. This information shows the difference between the analysis for the selected properties compared to all properties. It also shows what the mix of properties are within the area unit and the total rates each sector pays.

6) The mix of rate types (SDC rates only)

Figure 6 gives an indication of how the SDC rates are used on services according to Council's rate types. Typically urban properties will have a higher proportion of local and service rates than rural properties. "District" rates are those rates charged to all properties in the District irrespective of their location or the services supplied. This includes roading, regional heritage and the general rates. "Local" rates are those rates charged to properties that are dependent on the rating unit's location in respect of rating boundaries. This includes hall rates, pool rates and community board rates. "Service" rates are those rates charged to properties based on the services that they do or can receive. This includes water supply, sewerage and wheelie bin rates.

The right pie chart shows how SDC rates are assessed within the area unit. Fixed refers to the portion of rates that are set as a fixed amount per rating unit irrespective of property value. This type of rate tends to increase rates for lower value properties. Value based rates (capital and land value) show the portion of rates that are set according the capital value of the property (value of the land plus improvements) or land value. These tend to increase rates for higher valued properties.

7) Share of rate arrears, rebates and accommodation supplements

An over representation of properties in rate arrears, receiving a rate rebate or population receiving an accommodation supplement (Figure 7) may indicate rates/housing affordability tension.

Rate arrears occur when rates are not paid by the due date. There are a number of reasons why rates may be unpaid including households having difficulty with housing costs. The orange column in Figure 7 shows the proportion of properties with SDC arrears compared to the proportion of all properties within the area unit (shown by the black line). Arrears (orange column) that are above the line indicate the area unit has a greater portion of properties with arrears. At June 2019, 1,345 (7%) of properties had rate arrears (median arrears: \$500).

Rate rebates are available from the government for low income home owners to assist them to pay their rates. Rebates generally apply where rates make up more than 4 % of household income with eligibility dependent on the rates payable (over \$1,200), number of dependents and level of household income (must be less than \$44,000). The blue column in Figure 7 shows the percentage of properties that receive a rate rebate within the area unit compared to the overall percentage of properties within the area unit (shown by the black line). Rate rebates that are above the line indicate the area unit has a greater portion of properties with rebates. 632 properties received rebate in 2018/2019. These properties had a median pre-rebate rate of \$2,478 (\$1,869 post rebate). The median rebate paid was \$630 which indicates the median income of recipient households is between \$32,000-\$33,000. The median capital value of these properties was \$195,000 compared to residential median of \$255,000.

Assessing Southland rates affordability

Figure 4

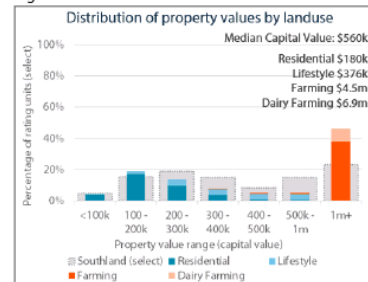


Figure 5

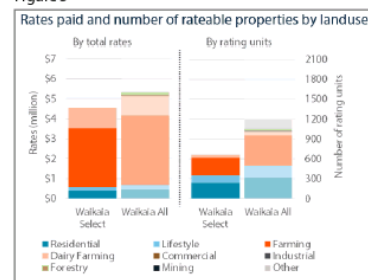


Figure 6

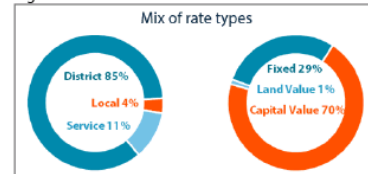
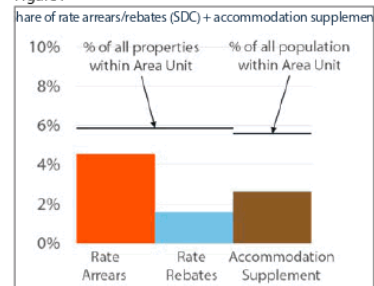


Figure 7

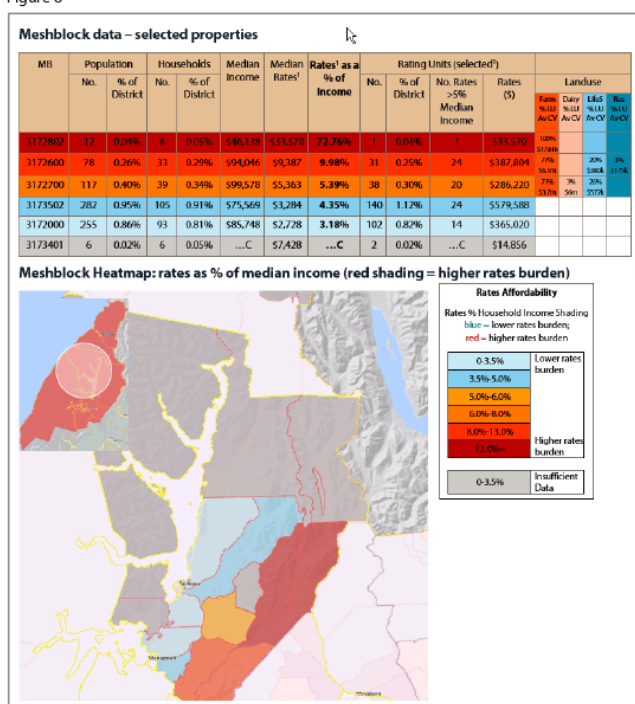


The **accommodation supplement** is a weekly payment which helps people with their rent, board or the cost home ownership. The amount of assistance provided is dependent on the individual's income and assets (with a maximum payment of \$80 per week in 2019). The Productivity Commission's Local Government Funding and Financing Report 2019 identified the accommodation supplement as the government's primary programme to help low-income individuals with housing costs. As such the proportion of the population receiving the accommodation supplement may also provide a gauge of people's ability to pay their housing related costs (including rates). The brown column in Figure 7 shows the percentage of population within the area unit that receive an accommodation supplement compared to the overall percentage of population within the area (shown by the black line). Supplements above the line is an indication that the area unit has a greater portion of the population receiving this type of assistance. At September 2019, 788 (3%) of people in Southland District were receiving an accommodation supplement.

8) Meshblock datatable and heat map

There can be considerable variability in household incomes/rates in each area unit. As such it is also useful to look at lower level meshblock data when looking at rates affordability. Each section in the report includes meshblock data tables and heatmaps (Figure 8) to show the results at a more granular level for each meshblock within the area unit. This data shows the same information which is included at the area unit level to provide more detail about the range of incomes/rates. In addition, for those meshblocks where rates (ES and SDC) are greater than 5% of median household income (orange-red shading), details of the land use and average capital of properties within the meshblock have also been included. This helps to show the driver for rates being over 5% of median household incomes, particularly for rural meshblocks which are made up of predominately farming and dairy farming properties, where high capital values contribute to higher rates and lower affordability assessments as a result. Despite this, when considering affordability of rates, it is also important to note the findings of previous studies⁸ which have found a strong correlation between incomes and capital values at the meshblock level. These have shown that a high property value (in particular capital value) generally correlates with higher level of household income.

Figure 8



⁸ 2007 Local Government Rates Inquiry – Funding Local Government

Southland at a glance

The data below summarises income and rates (SDC+ES) data for selected properties in Southland District's 38 area units and 757 meshblocks. Rates as a proportion of income in Southland sits at 3.95%. While this is lower than the 5% threshold, there are parts of the district where the threshold is exceeded. Table 3, Figure 9 and Figure 10 highlight these areas and more detail is included in the area unit and meshblock analysis for each community board area from page 26.

	Southland
Population	29,617
Households	11,523
Median Income	\$70,590
	Selected (All)
Median Rates	\$2,789 (\$2,592)
Average Rates	\$4,317 (\$3,626)
Rating Units	12,498 (20,328)
Total Rates	\$53.9m (\$66.6m)

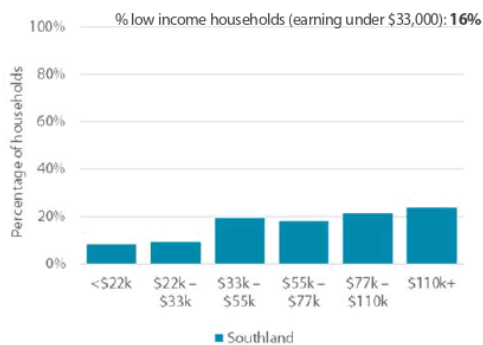
Rates as a proportion of income (affordability)



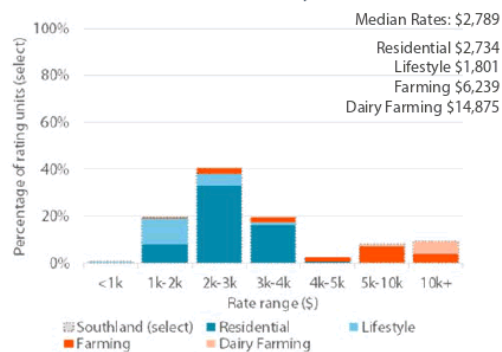
Southland

Area unit rate/income range: 1.7% - 10.2%
Meshblock rate/income range: 1.2% - 72.8%

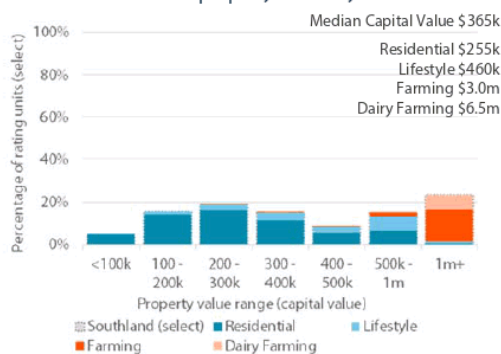
Distribution of household incomes



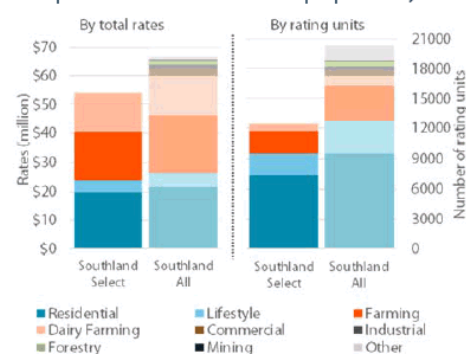
Distribution of rates by land use



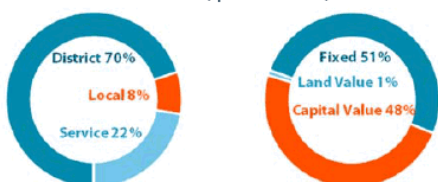
Distribution of property values by land use



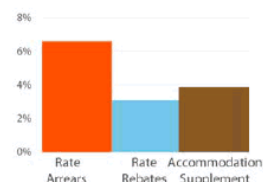
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^(SDC) + accommodation supplement



Assessing Southland rates affordability

Table 3: Southland Residential Household Rates Affordability Summary by Area Unit

Area Unit	Rates % Household Income	Median Household Income	Rates 2019 (ES and SDC)			Usually Resident Population (2013)	Number of Households (2013)	Number of Rating Units (selected)	Median Property Value (selected)		2018 NZ Deprivation Index ¹ 1 (least)-10 (most)	Low Income Households (HH)		Rate Arrears		Rate Rebates		Accommodation Supplement	
			Median	Average	Total (\$m)				Capital Value	Land Value		% HH over AU share	% AU HH income under \$33k	% rating units over AU share	% AU rating units in arrears	% rating units over AU share	% AU rating units with rebate	% pop. over AU share	% AU pop. with supplement
Wairoa ^(R)	10.19%	\$71,364	\$7,275	\$9,480	\$2.3	942	354	243	\$3.52m	\$2.88m	6		10-20%		5-10%		<5%		<3%
Ohai ^(U)	8.31%	\$30,427	\$2,527	\$2,533	\$0.4	303	126	151	\$57k	\$15k	9	1-2%	30+	2-3%	15%+	3-6%	10-15%	2-3%	7%+
Kaweku ^(R)	7.11%	\$88,072	\$6,262	\$8,364	\$1.4	567	204	166	\$2.92m	\$2.39m	5	<1%	<10%		<5%		<5%		
Riverton East ^(U)	7.01%	\$38,946	\$2,731	\$2,765	\$0.6	435	192	204	\$213k	\$57k	8	2-3%	30+	0<1%	5-10%	<3%	5-10%	2-3%	5-7%
Nightcaps ^(U)	6.81%	\$36,844	\$2,509	\$2,525	\$0.4	294	135	153	\$80k	\$22k	10	1-2%	30+	1-2%	10-15%	3-6%	10-15%	2-3%	7%+
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Tuatapere ^(U)	5.65%	\$46,470	\$2,624	\$2,655	\$0.7	558	246	261	\$141k	\$32k	8	1-2%	20-30%	2-3%	15%+	6-10%	10-15%	2-3%	5-7%
Manapouri ^(M)	5.40%	\$55,764	\$3,010	\$3,206	\$0.8	228	105	244	\$315k	\$121k	4	<1%	20-30%		5-10%		<5%	<1%	3-5%
Wyndham ^(U)	5.35%	\$58,087	\$3,108	\$2,984	\$0.7	534	222	232	\$120k	\$17k	8	1-2%	20-30%	3%+	15%+	3-6%	5-10%	3-4%	7%+
Fairfax ^(R)	5.30%	\$84,863	\$4,499	\$7,340	\$3.7	1,908	693	510	\$1.97m	\$1.58m	5		10-20%		<5%		<5%		<3%
Otautau ^(U)	5.09%	\$52,887	\$2,694	\$2,707	\$0.9	669	291	320	\$185k	\$20k	8	1-2%	20-30%	2-3%	10-15%	3-6%	5-10%	5-6%	7%+
Lumsden ^(U)	5.06%	\$53,108	\$2,686	\$2,703	\$0.6	405	177	220	\$180k	\$29k	8	1-2%	20-30%	2-3%	10-15%	<3%	<5%	1-2%	5-7%
Te Anau ^(U)	4.96%	\$62,513	\$3,100	\$3,195	\$4.7	1,911	813	1,469	\$390k	\$155k	4	1-2%	10-20%		<5%		<5%		<3%
Winton ^(U)	4.66%	\$58,530	\$2,729	\$2,784	\$3.0	2,211	957	1,074	\$260k	\$99k	6	4%+	20-30%		5-10%	10%+	5-10%	6-7%	3-5%
Balfour ^(U)	4.51%	\$55,985	\$2,526	\$2,453	\$0.2	126	54	64	\$158k	\$20k	2	<1%	20-30%		5-10%	<3%	<5%		
Mararoa River ^(R)	4.08%	\$83,314	\$3,397	\$6,981	\$3.9	1,587	594	552	\$965k	\$390k	3		<10%		<5%		<5%		<3%
Stewart Island ^(U)	3.95%	\$59,526	\$2,353	\$2,479	\$0.8	381	171	334	\$310k	\$126k	5	1-2%	20-30%		<5%		<5%		<3%
Milford ^(U)	3.91%	\$52,555	\$2,054	\$2,283	\$0.05	117	30	20	\$673k	\$570k	3				<5%				
Toetoes ^(R)	3.86%	\$71,033	\$2,742	\$4,551	\$2.8	1,647	582	624	\$945k	\$640k	5		10-20%		5-10%		<5%		<3%
Mossburn ^(M)	3.84%	\$58,973	\$2,262	\$2,755	\$0.3	210	87	97	\$165k	\$20k	5		10-20%	<1%	5-10%	<3%	<5%	<1%	<3%
Edendale ^(U)	3.63%	\$74,241	\$2,697	\$2,884	\$0.7	555	231	253	\$220k	\$67k	5	<1%	10-20%		5-10%	<3%	<5%	<1%	3-5%
Riversdale ^(U)	3.40%	\$63,619	\$2,165	\$2,175	\$0.4	372	159	185	\$200k	\$29k	5		10-20%	<1%	5-10%		<5%		<3%
Waituna ^(R)	3.29%	\$85,416	\$2,808	\$6,595	\$3.1	1,683	612	466	\$1.05m	\$785k	4		<10%		5-10%		<5%		<3%
Waikaia ^(R)	3.15%	\$74,352	\$2,340	\$6,823	\$4.5	1,656	642	663	\$560k	\$220k	5		10-20%		5-10%		<5%		<3%
Te Waewae ^(R)	3.13%	\$65,168	\$2,043	\$4,396	\$2.7	1,380	534	604	\$465k	\$185k	6	1-2%	20-30%	<1%	5-10%		<5%		<3%
Hokonui ^(R)	2.98%	\$87,850	\$2,615	\$5,665	\$5.3	3,087	1,089	939	\$840k	\$275k	4		<10%		5-10%		<5%		<3%
Wallacetown ^(U)	2.89%	\$78,999	\$2,281	\$2,353	\$0.6	663	243	263	\$255k	\$56k	4		10-20%	1-2%	10-15%	<3%	<5%		<3%
Dacre ^(R)	2.53%	\$93,161	\$2,356	\$5,309	\$2.7	1,617	579	504	\$933k	\$535k	4		<10%		5-10%		<5%		<3%
Woodlands ^(U)	2.46%	\$71,918	\$1,769	\$2,789	\$0.3	264	111	111	\$340k	\$80k	4		10-20%		5-10%	<3%	<5%		<3%
Waianiwa ^(R)	2.29%	\$85,748	\$1,966	\$4,617	\$2.9	1,968	711	620	\$603k	\$228k	4		<10%		5-10%		<5%		<3%
Makarewa North ^(R)	1.74%	\$90,727	\$1,579	\$1,780	\$0.2	327	120	129	\$475k	\$170k	2		10-20%		<5%		<5%		
Southland	3.95%	\$70,590	\$2,789	\$4,317	\$54.0	29,613	11,523	12,498	\$365k	\$143k									

1 – These figures have been obtained by calculating the weighted average deprivation score for Statistical Area 1 areas contained within the specified area unit. Note – the NZDep2018 figures are from the December 2019 Interim Research Report.

(U) – Denotes a mainly urban area; (R) denotes a mainly rural area; (M) denotes a mix of urban and rural areas

Table 3 (above) summarises the analysis of household rates affordability by each area unit across a range of indicators (shown in columns). Shading for each indicator across areas units in the table has been used to signpost risks to affordability. The darker the shading and the more columns shaded, the greater likelihood there is of affordability issues. An explanation of the indicators in the table is summarised below. Detailed information for each of the area units (and associated meshblocks) are included from page 26 under each community board section.

The analysis showed that some parts of the District, in particular the urban areas of Ohai, Nightcaps, Riverton, Otautau, Wyndham, Lumsden not only had rates more than 5% of household income, but also triggered several other affordability indicators. This is usually because of lower income levels rather than higher rates (although the higher proportion of fixed/uniform rates in these areas plays a contributing role).

In addition, the initial rates affordability analysis shows some rural areas (Wairio, Kaweku and Fairfax) where median rates are more than 5% of median household income. However this is largely a result of higher property values resulting in higher rates, with few other affordability indicators showing.

About the indicators

Area Unit	1 Rates % Household Income	2 Median Household Income	3 Median	4 Average	5 Total (\$m)	6 Usually Resident Population (2013)	7 Number of Households (2013)	8 Number of Rating Units (selected)	9 Median Property Value (selected)	10 Capital Land Value	11 2018 NZ Deprivation Index ¹	12 Low Income Households (HH)	13 Rate Arrears	14 Rate Rebates	15 Accommodation Supplement	16 Rate Rebates	17 Rate Rebates	18 Rate Rebates	19 Rate Rebates
Wairio ¹⁰	10.19%	\$71,364	\$7,275	\$9,480	\$2.3	942	354	243	\$3.52m	\$2.88m	6	1-2%	30+	2-3%	15%+	3-6%	10-15%	2-3%	7%+
Ohai ¹⁰	8.31%	\$30,427	\$2,527	\$2,533	\$0.4	303	126	151	\$57k	\$15k	9	1-2%	30+	2-3%	15%+	3-6%	10-15%	2-3%	7%+

- (1) Rates % Household Income – key affordability measure that identifies the median rates (ES and SDC) as a proportion of median household income for selected properties. The shading colour reflects the level of rates burden. Warm red colours equate to a higher rates burden (higher likelihood of rates affordability issues) and cooler blue colours equate to a lower rates burden (lower likelihood of rates affordability issues).
- (2) Median Household Income – the midpoint household income in the area unit. The shading shows areas where household income is lower the district median and darker shading represents the degree of variation.
- (3) Median Rates – the midpoint rate (ES and SDC) for selected properties in the area unit. The shading shows areas where rates are higher than the district median and darker shading represents the degree of variation.
- (4) Average Rates – total 2019/2020 rate (ES and SDC) for selected properties in the area unit divided by the number of rating units. The shading shows areas where rates are higher than the district average and darker shading represents the degree of variation.
- (5) Total Rates – the total amount of rates (ES and SDC) collected from selected properties in the area unit.
- (6) Usually Resident Population – number of people who usually live in the area unit.
- (7) Number of households – number of households in the area unit. The household is either one person who usually resides alone, or two or more people who usually reside together and share facilities in a private dwelling.
- (8) Number of rating units (selected) – number of rateable properties in the area unit selected for analysis (refer to the Methodology section on page 22 for further details).
- (9) Median Property Capital Value - the middle value (value of the land plus improvements) for selected properties in the area unit. The shading shows areas where capital value is lower than the district median and darker shading represents the degree of variation.

- (10) Median Property Land Value - the middle value (value of land only) for selected properties in the area unit. The shading shows areas where land value is lower than the district median and darker shading represents the degree of variation.
- (11) 2018 NZ Deprivation Index – measures the deprivation level in the area unit using a scale from 1 (least-deprived areas) to 10 (most deprived areas). The darker shading represents greater degree of deprivation.
- (12) Low Income Households (% over area unit share) – gauges the proportion of households with low income within the area unit compared to the proportion of all properties within the area unit to identify any over-representation (stated as a percentage range). For example, the Ohai area unit has 1.1% of the total households in the district but it also has 2.7% of all low income households in the district. This means that the Ohai area unit is over-represented with low income households by 1.6% (shown as 1-2% in the table). The darker shading represents a greater proportion of households with low income than would be expected.
- (13) Low Income Households (% area unit with household income under \$33,000) – looks at proportion of households in the area unit with low income (less than \$33,000). The darker shading represents a greater proportion of households with low income.
- (14) Rate Arrears (% over area unit share) – as with (12) above, this measures the proportion of households in rate arrears (those with unpaid rates at 30 June 2019) within the area unit compared to the proportion of all properties within the area unit to identify any over-representation (stated as a percentage range). The darker shading represents a greater proportion of properties with rates arrears than would be expected.
- (15) Rate Arrears (% area unit with rates in arrears) – as with (13) above, this looks at proportion of households in the area unit with rates owing at 30 June 2019. The darker shading represents a greater proportion of properties with rates arrears.
- (16) Rate Rebate (% over area unit share) – as with (12) above, this measures the proportion of households that receive a rate rebate within the area unit compared to the proportion of all properties within the area unit to identify any over-representation (stated as a percentage range). The darker shading represents a greater proportion of properties receiving a rate rebate than would be expected.
- (17) Rate Rebate (% area unit receiving a rate rebate) – as with (13) above, this looks at proportion of households in the area unit receiving a rate rebate in 2018/2019. The darker shading represents a greater proportion of properties receiving a rate rebate.
- (18) Accommodation Supplement (% population over area unit share) – as with (12) above, this measures the proportion of the population that were receiving the accommodation supplement in the area unit compared to the proportion of the population within the area unit to identify any over-representation (stated as a percentage range). The darker shading represents a greater proportion of the population receiving the accommodation supplement.
- (19) Accommodation Supplement (% population with supplement) – as with (13) above, this looks at proportion of the population in the area unit that receive an accommodation supplement. The accommodation supplement is a weekly payment from government which helps people with their rent, board or the cost home ownership. It may provide a gauge of people's ability to pay their housing related costs (including rates). The darker shading represents a greater proportion of the population receiving the accommodation supplement than would be expected.

Figure 9 - Southland District Area Unit Heatmap: rates as % of median income

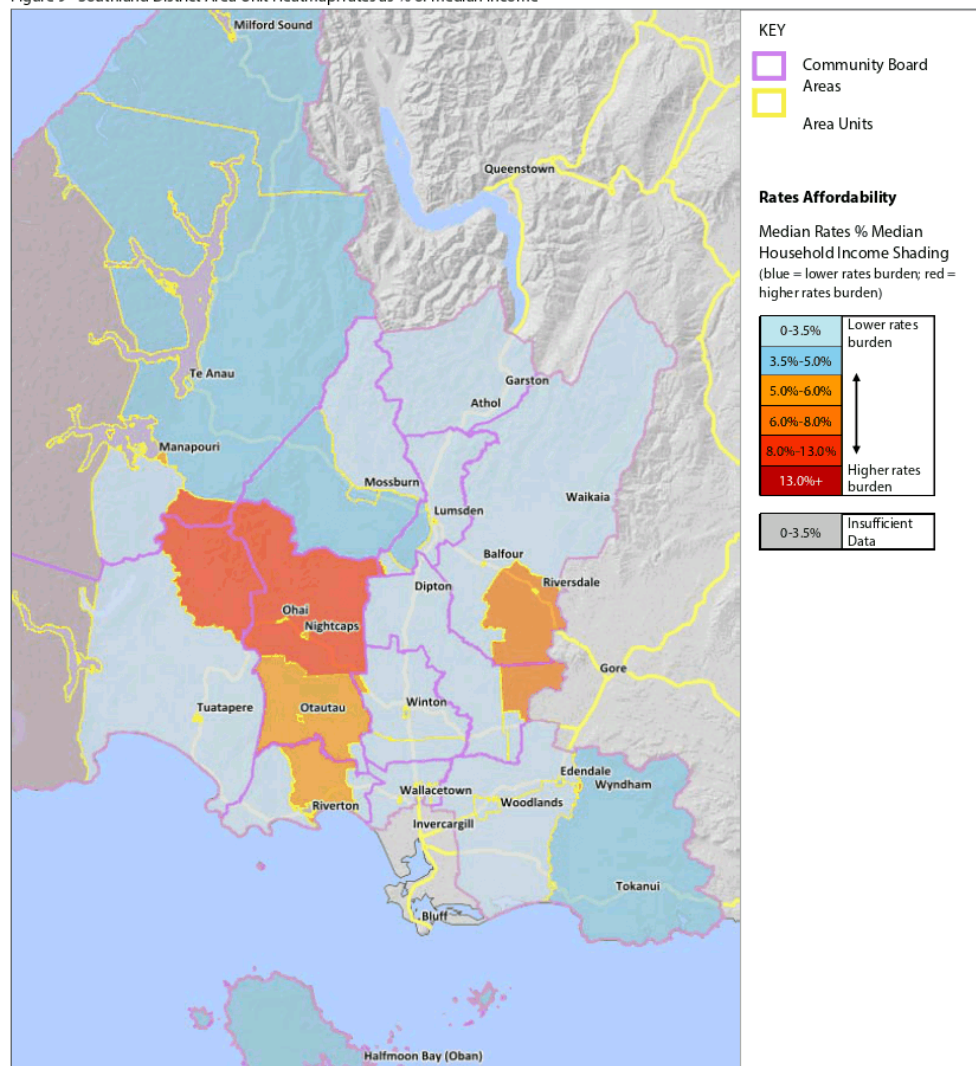
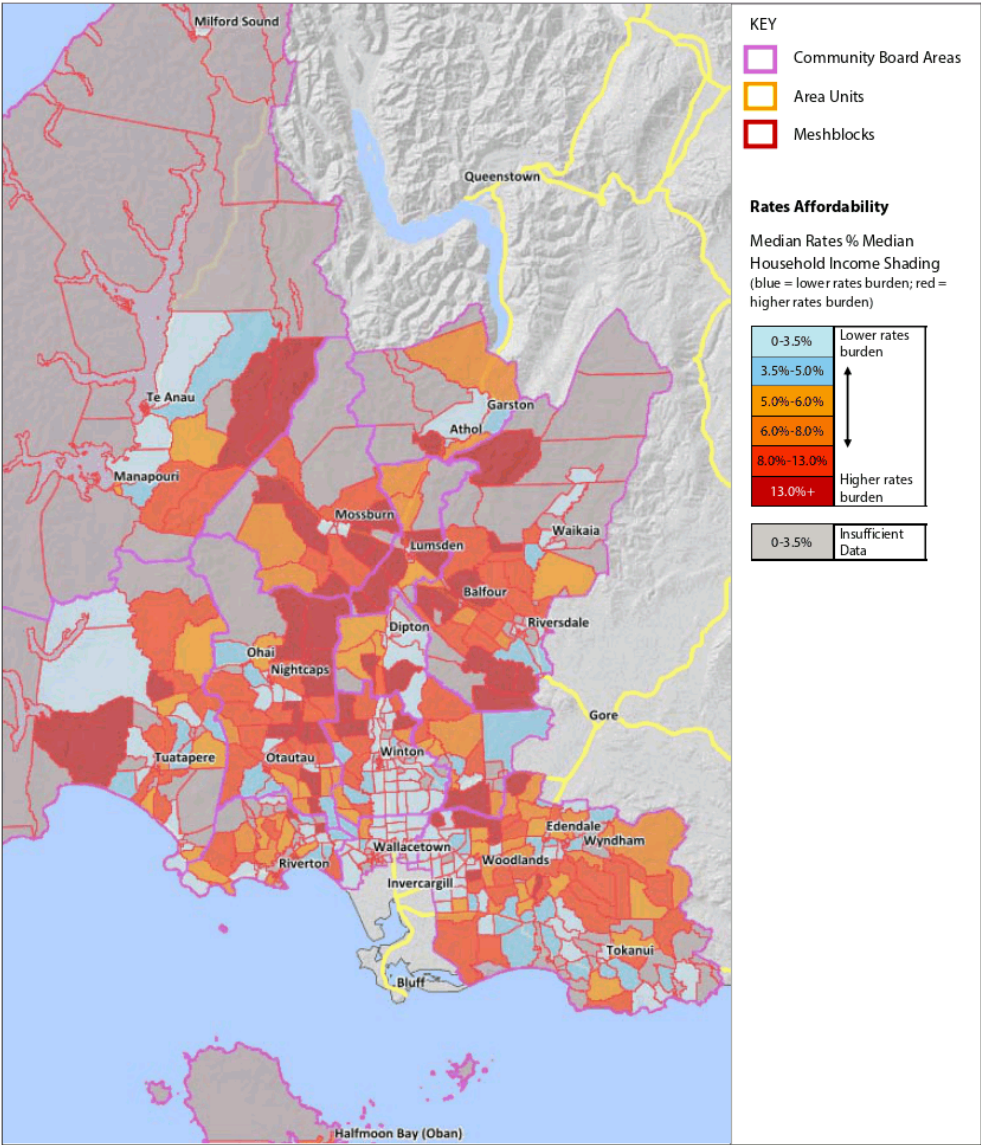


Figure 10 - Southland District Meshblock Heatmap: rates as % of median income



Industry/business rate affordability

Industry/business capacity to pay rates can be considered using modelled territorial authority GDP data where rates for each industry type can be considered against the GDP (value of goods and services produced) for each industry sector. This provides a loose substitute for being able to measure rates as a % of median profit/income levels for Southland businesses given the constraints currently in place for accessing this information from the Statistics NZ's longitudinal business database. Table 4 shows rates (ES and SDC) as a percentage of GDP for industry classifications in Southland with total industry/business rates making up just over 2% of GDP.

Table 4: Industry/Business Rates as a % GDP

Industry Grouping ¹	2018 ² GDP ('000) (assessed)	Rates ('000) (ES+SDC)	Rates % GDP
Agriculture	\$672,626	\$33,434	5.0%
Commercial – Trade and Transport	\$227,538	\$954	0.4%
Commercial – Other	\$259,497	\$415	0.2%
Commercial – Accommodation	\$31,466	\$1,108	3.5%
Education and Training	\$40,181	\$185	0.5%
Forestry, Fishing Mining, Utilities	\$229,379	\$1,830	0.8%
Health and Social Assistance	\$18,997	\$170	0.9%
Manufacturing	\$384,472	\$1,497	0.4%
Public Administration and Safety	\$9,948	\$507	5.1%
Total (excluding GST)³	\$1,874,104³	\$40,098	2.1%

¹ Details of the approach taken to assigning rates to GDP groupings based on GDP classifications is explained on page 23.

² At the time of writing 2018 Modelled GDP data was only available for Southland District at a total level (not by industry classification). For the purposes of this modelling, industry shares have been estimated using the average of published figures for each industry classification between 2015 - 2017.

³ GST on Production, Import Duties and Other Taxes (\$151 million in 2018) has not been included the industry analysis as it cannot be allocated specific industry groups.

The agriculture industry has both the highest GDP (\$673m) and rates (\$33m) of all industry sectors with rates making up 5% of GDP. When looking at the rates breakdown, over 53% of the rates for this industry comes from pastoral fattening and 41% from dairy farming. The remainder comes from specialist deer farms (2.8%), pastoral grazing (2.1%) followed by a range of other arable, horticultural and livestock farming activities. With large land areas, the agriculture sector typically has higher land/capital values which means this sector pays a larger portion of value-based rates resulting in the higher rates as a percentage of GDP.

Public administration and safety rates make up 5.1% of GDP. This GDP industry category is defined as local government administration and central government administration, defence and public safety. By nature these activities are likely to have relatively low GDP figures. However in terms of rating, this sector is likely to have a relatively high level of rates because the properties included in the analysis have high capital values (fire/police/ambulance stations/public halls) or have larger land areas (sports/golf/bowling/racing clubs) and therefore pay more in value-based rates. In addition around half of these properties also pay fixed service rates for water, sewerage and waste collection which also contributes to the rating level of this industry group. It is also useful to note that that Council currently provides rate remissions of between 50%-100% (excluding service rates) for community facilities which provide a benefit to the community as a whole (such as museums, art galleries/societies, public halls, certain sports clubs and agricultural societies).

Manufacturing includes the physical or chemical transformation of materials, substances or components into new products (excluding agriculture and construction). This includes the manufacture of food and beverages (meat, seafood, dairy products, oil), textiles/clothing, wood, paper, fertiliser, fuels, metals, printing, furniture and machinery. For the purposes of the analysis, rates for all industrial land use properties have been included in this classification with the major sectors being industrial light/industrial services (making up 50% - such as engineering/automotive workshops, concrete/fertiliser production, transport operators and contractors), heavy manufacturing (making up 29% - such as dairy factories and timber processors) and industrial freezing (making up 11% - such as freezing works and coolstores).

While this data provides some context around how rates sit in comparison to the value of goods and services produced by industry sectors, information about the level of rating within business sectors is also useful.

Assessing Southland rates affordability

Figure 7 shows the land use sector's share of total rates (inner circle) and number of rating units (outer circle).

Non-residential properties are surrounded by the -- line with farming and dairy farming properties making up the largest portion of the non-residential sector and residential properties making up the largest share overall.

Table 5 summarises the overall rating information for each land use type across Southland District with this discussed in more detail for each land use type below.

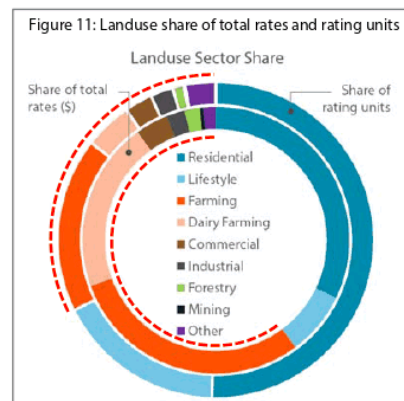
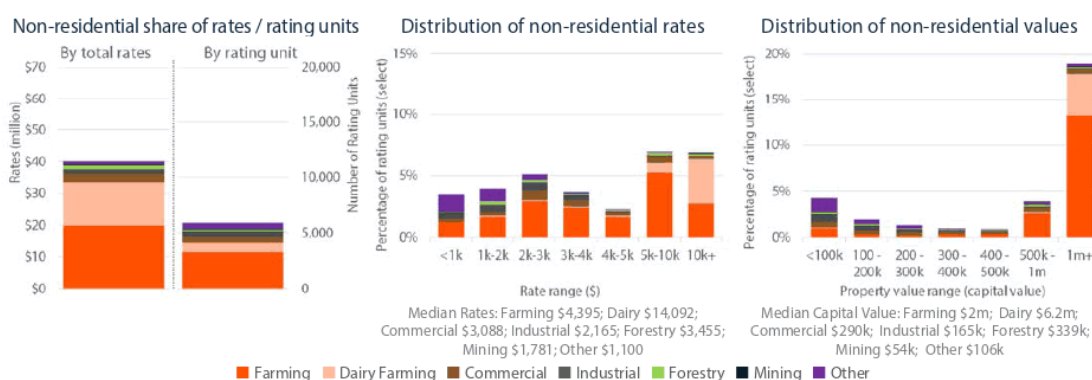


Table 5: Rating data across land use sectors (all properties)

Land use	Total Rates 2019 (ES and SDC)		Rate		Rating units		Capital Value		Land Value	SDC only Rates 2019
	\$	%	Median	Average	Number	%	Median	Average	Median	\$
Non-Residential Rating										
Farming	\$19.7m	29.6%	\$4,395	\$6,009	3,280	17.9%	\$2.0m	\$2.8m	\$1.7m	\$13.9m
Dairy Farming	\$13.7m	20.6%	\$14,092	\$15,326	896	4.9%	\$6.2m	\$6.6m	\$4.8m	\$10.3m
Commercial	\$2.6m	3.9%	\$3,088	\$5,001	524	2.9%	\$290k	\$668k	\$84k	\$2.5m
Industrial	\$1.5m	2.2%	\$2,165	\$3,513	426	2.3%	\$165k	\$830k	\$64k	\$1.3m
Forestry	\$1.2m	1.8%	\$3,455	\$5,873	208	1.1%	\$339k	\$664k	\$315k	\$1.1m
Mining	\$0.3m	0.5%	\$1,781	\$14,611	21	0.1%	\$54k	\$663k	\$45k	\$0.3m
Other	\$1.0m	1.5%	\$1,100	\$1,735	582	3.2%	\$106k	\$557k	\$41k	\$0.9m
Residential Rating										
Residential	\$21.4m	32.1%	\$2,626	\$2,311	9,261	50.4%	\$220k	\$252k	\$71k	\$19.7m
Lifestyle	\$5.2m	7.7%	\$1,610	\$1,617	3,177	17.3%	\$355k	\$408k	\$155k	\$4.4m
ALL LAND USE	\$66.6m		\$2,592	\$3,626	18,375		\$305k	\$1.1m	\$135k	\$54.4m

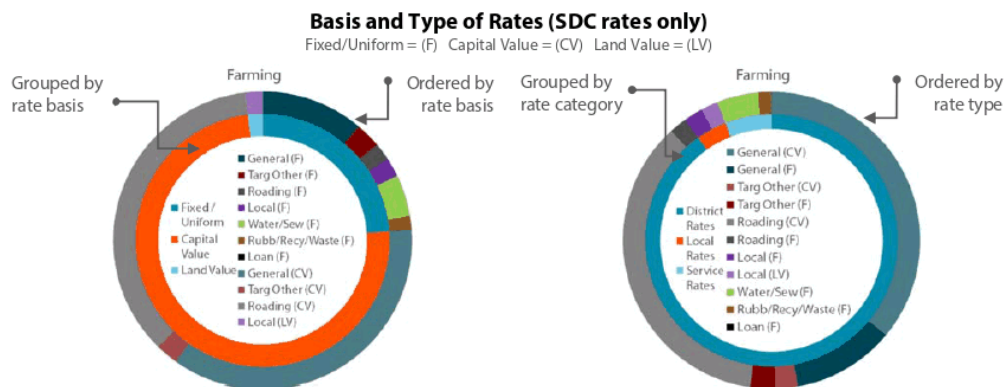
Non-residential rating (all properties)

The graphs (below) provide a snapshot of non-residential rating (those excluding residential and lifestyle) and provides additional context to the GDP data for the industry/business analysis. Non-residential properties pay 60.1% of total rates (\$40.1m ES and SDC) and make up 32.4% (5,937) of all rating units. The median non-residential rate (ES and SDC) is \$3,977 and the property median capital value is \$1.4m. Farming properties contribute the greatest share of non-residential rates, followed by dairy farming, commercial, industrial, forestry and other (includes schools, churches, halls, sports clubs, reserves etc). Each land use sector is examined in more detail below in order to understand what determines each sector's share of rates and why some sectors pay more in rates than others. 14% of non-residential properties pay rates over \$5,000 (primarily farming/dairy farming properties) and 5% pay between \$2,000 to \$3,000.



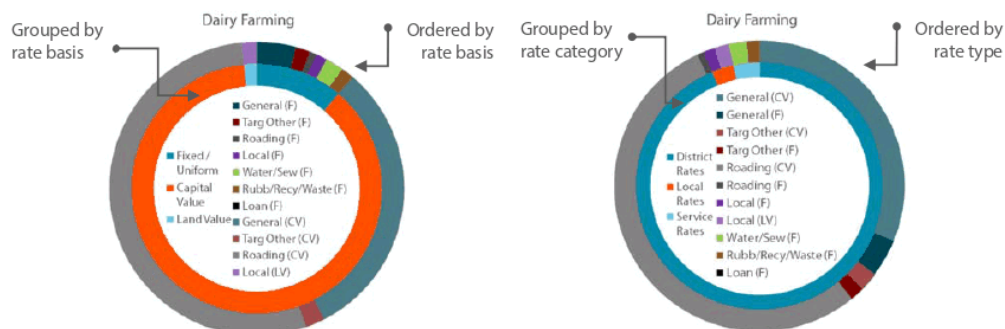
Farming sector rating

The farming sector's 30% share of rates (\$19.7m) is driven by the number of rating units and the capital value of properties with a median rate for farming of \$4,395 and median capital value of \$2.0m. In terms of Southland District Council rates, 74% of the farming sector's share of rates are collected on the basis of property capital value (left pie chart below) with the capital value portion of the general rate and roading rate both making up 32% respectively. By comparison, the farming sector pays a small proportion of overall local and service rates (right pie chart below) which are generally set as a fixed charge irrespective of property value. It is also useful to look Beef + Lamb New Zealand's farm profit forecasts in relation to median rates. Their 2019/2020 outlook forecast average profit for an Otago/Southland sheep/beef farm of \$252,700⁹. A farm of this size and type pays around \$15,000 in rates equating to around 5.9% of operating profit.



Dairy farming sector rating

The dairy farming sector's 21% share of rates (\$13.7m) is driven primarily by the capital value of properties as dairy farms make up just 5% of the total number of rating units. The median rate for dairy farming is \$14,092 and median capital value is \$6.2m. In terms of Southland District Council rates, 87% of the farming sector's share of rates are collected on the basis of property capital value (left pie chart) with the capital value portion of the roading rate making up 54% of this and general rate making up 31%. As with farming, dairy farms pay a small proportion of overall local and service rates (right pie chart). It is also useful to look at data produced by DairyNZ to get an idea of rates in comparison to farm profitability. DairyNZ DairyBase 2018/2019 benchmarking identifies the average operating profit for an Otago/Southland dairy farm of \$589,519¹⁰. A farm of this size and type pays around \$18,000 in rates equating to around 3.1% of operating profit.

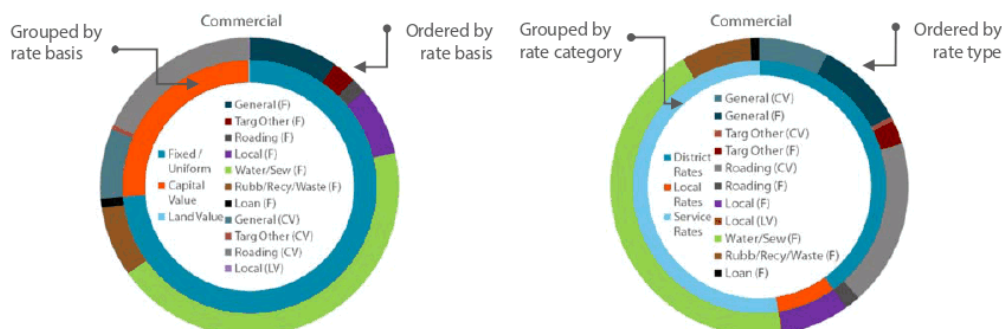


⁹ New Season Outlook 2019/2020 forecasts are based on average farm size (effective area 820 hectares) and stock units (4,400) with EBITRm (earnings before interest, tax, rent and managers wages) of \$308/hectare www.beeflambnz.com/data-tools

¹⁰ Dairy farm 2018/2019 profit (before tax/interest) based on DairyNZ data - Southland farm size (effective area 227 hectare) sourced from www.dairynz.co.nz/media/5792471/nz-dairy-statistics-2018-19-web-v2.pdf and average Otago/Southland operating profit/hectare (\$2,597) sourced from www.dairynz.co.nz/business/dairybase/benchmarking/latest-dairybase-benchmarks/

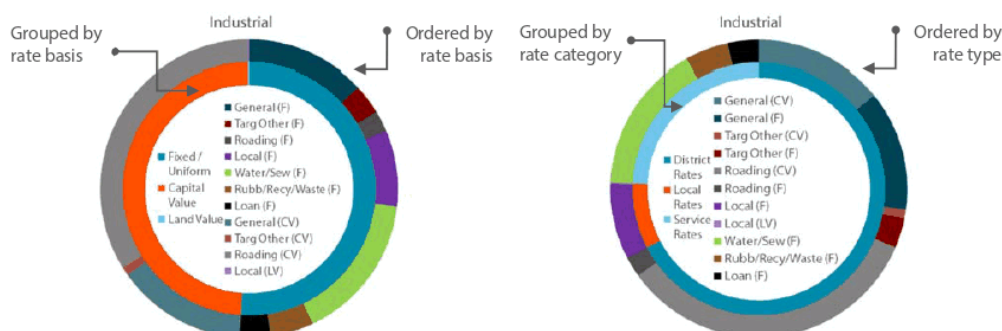
Commercial sector rating

The commercial sector's 4% share of rates (\$2.5m) is driven primarily by the number of rating units given that these properties make up 3% of the total number of rating units. The median rate for commercial properties is \$3,088 and a median capital value of \$290,000. In terms of Southland District Council rates, 74% of the commercial sector's share of rates are collected on a fixed/uniform basis (left pie chart) with service rates making up 52% of these fixed charges including wastewater at 36%, water at 8% and rubbish/recycling (7%). Other district fixed charges including the general rate and roading fixed charge make up another 14% of this sector's rates with the remainder coming from local rates. The roading rate makes up the largest portion of the sector's capital value based rates at 18%.



Industrial sector rating

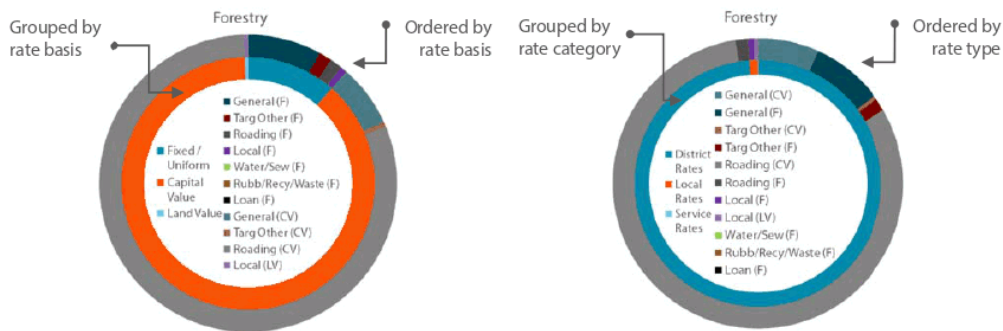
The industrial sector's 2% share of rates (\$1.5m) is driven primarily by the number of rating units which make up 2% of the total number of rating units. The median rate for an industrial property is \$2,165 and median capital value is \$165,000. In terms of Southland District Council rates, the industrial sector's share of rates is relatively evenly split between rates based on capital value and on a fixed/uniform basis (left pie chart). The majority of capital value based rates are for roading (34%) and the general rate (14%) with the fixed service rates making up 24% of fixed charges including wastewater at 9%, water at 7% and rubbish/recycling at 5%.



Forestry sector rating

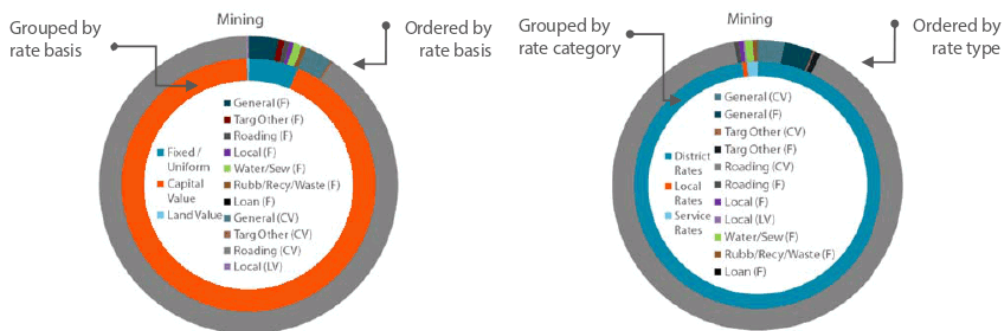
The forestry sector's 2% share of rates (\$1.2m) is driven primarily by the land/capital value of these properties given that forestry makes up just 1% of the total number of rating units. The median rate for a forestry property is \$3,455 and the median capital value of a forestry property is \$339,000. In terms of Southland District Council rates, the forestry sector's share of rates is largely based on capital value with 88% of rates collected on this basis (left pie chart). The majority of capital value based rates are for the roading rate (81%) with the remainder mostly related to the general rate (7%) and a small amount related to the local ward rates. The largest portion of fixed rates for this sector is for the general rate (8%).

Assessing Southland rates affordability



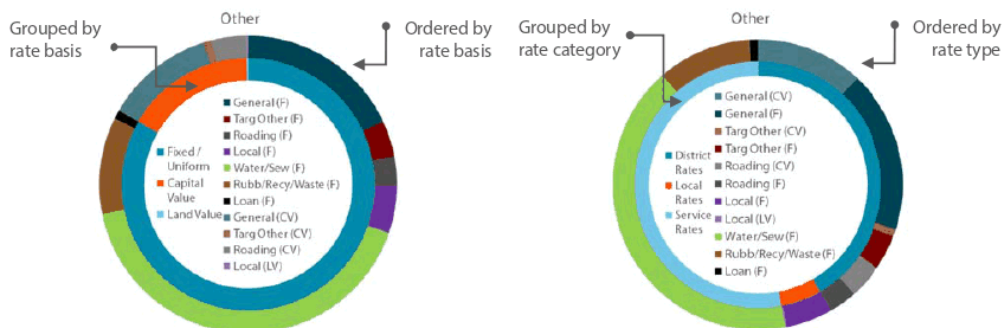
Mining sector rating

The mining sector's 0.5% share of rates (\$0.3m) is driven primarily by the capital value of these properties with mining making up just 0.1% of the total number of rating units. The median rate for a mining property is \$1,781 and the median capital value is \$54,000. In terms of Southland District Council rates, 93% of the mining sector's share of rates is based on capital value (left pie chart). The majority of capital value based rates are for the roading rate (90%) with the remainder mostly related to the general rate (3%). The largest portion of fixed rates for this sector is for the general rate (3%).



Other sector rating

The other land use sector's 1.5% share of rates (\$1.0m) is driven primarily by the number of properties at 582 (3.2% of the total rating units). The median rate for this sector is \$1,100 and the properties have a median capital value of \$106,000. In terms of Southland District Council rates, 83% of the other sector's share of rates are collected on a fixed/uniform basis (left pie chart) with service rates making up 53% of these including wastewater at 29%, water at 12% and rubbish/recycling at 10%. Other fixed charges include those for the general rate, roading and other district targeted rates contributing 25% of this sector's rates with the remainder coming from local rates (5%). The general rate is the main value-based rate, making 12% of the sector's rates.

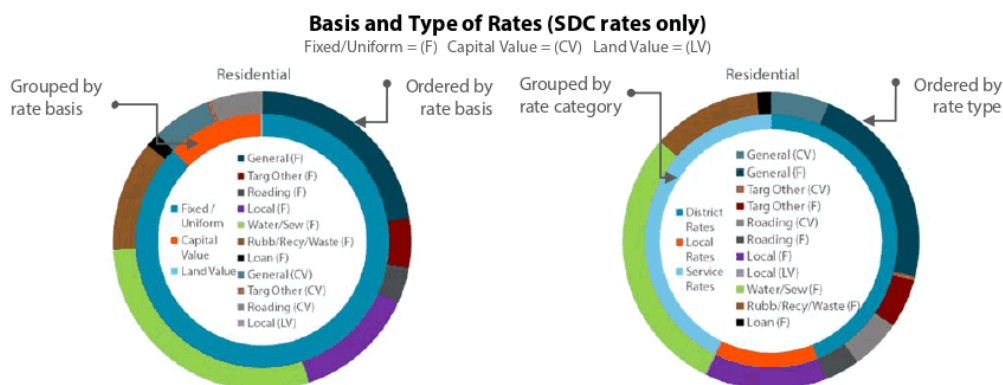


Residential rating (all properties)

The earlier household analysis included on page 7 focuses on selected residential properties to match census household income data. The following information contains data for all residential properties (including vacant land) in order to provide comparable data to the non-residential rating information.

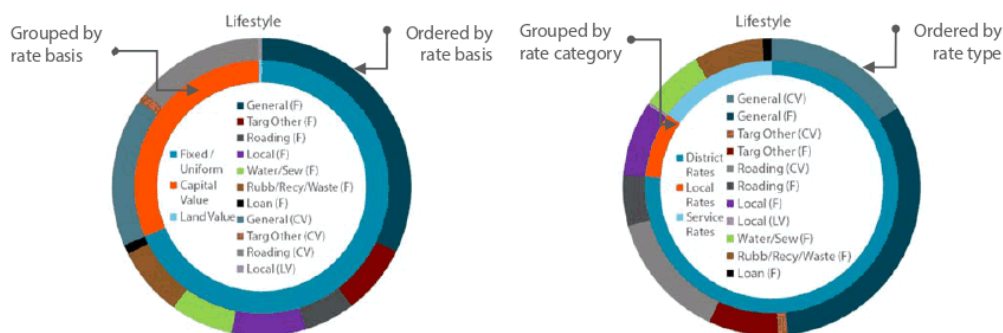
Residential

The residential sector's 32% share of rates (\$21.4m) is driven primarily by the number of properties given that they make up 50.4% of the total number of rating units. The median rate for all residential properties is \$2,626 and the median capital value is \$220,000. In terms of Southland District Council rates, 88% of the residential sector's share of rates are collected on a fixed/uniform basis (left pie chart) with service rates making up 43% of these fixed charges including wastewater at 16%, water at 13% and rubbish/recycling at 11%. Other district fixed charges including the general rate (22%), roading fixed charge (4%) and other district wide targeted rates (5%). Most of the remainder of the fixed charges are from local rates (13%). In terms of rates set on capital value, 12% of rates are set in this way split relatively evenly between the general rate and roading rate.



Lifestyle

The lifestyle sector's 8% share of rates (\$5.5m) is driven primarily by the number of properties which make up 17% of the total number of rating units. The median rate for all lifestyle properties is \$1,610 and the median capital value is \$355,000. In terms of Southland District Council rates, 69% of the lifestyle sector's share of rates are collected on a fixed/uniform basis (left pie chart) with the general rate fixed charge making up the majority (32%) and other district fixed rates making up 13% and fixed charges for services making up 14% (wastewater 3%; water 4%; rubbish/recycling 7%). Local fixed rates account for the majority of the remaining fixed charges. In terms of rates set on capital value, 31% of lifestyle rates are set in this way, with the general rate accounting for 16% and roading rate 14%.



Methodology

Rates affordability has been assessed by looking at the level of rates in relation to household incomes for the residential sector and in relation to GDP for industry/business.

The 2007 Independent Inquiry into Local Government Rates (known as the Shand report) suggested that a rough benchmark for when rates affordability problems arise is where rates exceed 5% of gross household income. The analysis in this document shows the range of rates affordability, with 5% set as the level at which rates start to become less affordable in relation to incomes.

This document accompanies a GIS layer, which provides summary statistics by area unit and meshblock on incomes, rates and rates affordability within Southland District. Maps of this information have been included.

Data sources

Rates data by meshblock was produced by Southland District Council by matching rating units (by valuation/VG number) to primary meshblocks which are also assigned to area units. Rates data relates to the rates strike information used for the year ended 30 June 2020. Valuation data was extracted from Council's rating information database.

A meshblock is the smallest geographic unit for which data is reported by Statistics New Zealand. An area unit is the next reporting level up from meshblock, with each area unit containing multiple meshblocks.

Population, households and median income data by meshblock and area unit is sourced from the 2013 Census, with these figures being the latest available for these geographic reporting levels. 2013 Census income data has been inflated to estimate 2019 levels.

Information about rate arrears and rebates was sourced from Council's rating system (Pathways) as at 30 June 2019.

Accommodation supplement information was sourced from Ministry of Social Development as at 30 September 2019. Data for three area units (Balfour, Kaweku and Makarewa North) was suppressed to protect privacy.

Deprivation data has been sourced from the New Zealand Index of Deprivation 2018 (NZDep2018) which was released in December 2019 by University of Otago, Department of Public Health. The index uses a scale from 1 (least-deprived areas) to 10 (most deprived areas). The index measures eight dimensions about people/homes including people receiving a benefit, people on a low income, people not living in their own home, people unemployed, people with no qualifications, single parent families, overcrowding, people living in damp/mouldy dwellings and access to the internet at home.

Gross domestic product (GDP) data for Southland District was sourced from 2018 Ministry for Business, Innovation and Employment Modelled Territorial Authority GDP data.

Sheep and beef farm profit data was sourced from forecasts for Otago-Southland in Beef and Lamb New Zealand's New Season Outlook 2019-20. Dairy farm profit data was sourced from DairyNZ's New Zealand Dairy Statistics (2018-2019) for Southland and DairyBase financial benchmarks for Otago-Southland.

Assumptions

Households

The assumptions made in estimating the affordability of household rates for residential type properties in the Southland District are outlined below.

1. The rates analysis is based on \$66.6 million total rates (including GST) for the 2019/2020 year for properties within the Southland District area. This consists of \$54.4 million of Southland District Council rates and \$12.2 million of Environment Southland rates. Most figures in the report use total combined Council rates. However where an analysis of rate type is included in the report (e.g. mix/basis of rates) the rate figures only use Southland District Council data as a detailed breakdown by rate type and rate basis for Environment Southland rates was not provided.
2. A selection of rating units have been used in the household analysis to try to fit with the census household income “households” (places of permanent residence). This selection is based on the following criteria:
 - exclusion of vacant properties
 - exclusion of non-residential properties (commercial, industrial, forestry, other)
 - inclusion of properties where the land use category is likely to contain a “household”. The specific land use categories included are shown in Table 6 on page 25 and this has resulted in the inclusion of residential, lifestyle, farming and dairy farming properties that contain a residence of some type (e.g. dwelling, flat, unit, cottage, townhouse etc) noting that:
 - rates on holiday homes cannot be differentiated from rates paid on places of permanent residence and, as such it is likely that the number of rating units may be higher than the number of households reported from the census. The impact of this is slightly offset by the use of median rates versus average rates in the analysis.
 - because farming and dairy farm rates cannot be separated between the place of residence and productive portions of the property, median rates in rural areas are likely to be higher. This is because rates are assessed against the total farm area and the larger areas have large property values which means that rural properties typically pay higher capital/land value based rates. In addition, incomes that are paid to farm workers in these areas may also be impacting the level of income reported, particularly where farm owners are absentee or because of how farm “household” income might be reported as distinct from the legal farm “entity” income.
 - exclusion of properties that have had rates written off or are non-rateable.
 - exclusion of properties that could not be matched to a meshblock.

Using this criteria 12,498 rating units with total rates of \$54.4 million have been used for the household analysis which is a subset of the total number of rating units of 20,328 with total rates of \$66.6 million.

3. Meshblocks where income data has been suppressed (due to the small number of households) are excluded.
4. Median household incomes are estimated from 2013 census information using the labour cost index salary and wage rates (June 2019 quarter) which equates to an inflation rate of 10.6% between March 2013 and March 2019¹¹. Estimates have been used due to the delay in the release of Census 2018 household income information and the inability to obtain alternative area unit and meshblock income data. This results in an estimated 2019 median household income of \$70,562. Comparison with the latest income estimates suggest Southland District median household income is \$77,200¹². While this is higher than \$70,562 used in the analysis, census-based figures tend to be lower than published estimates in the

¹¹ Southland District Median Household Income - 2013: \$63,800; 2019: \$70,562 (estimate using 10.6% inflation over 2013)

¹² Comparisons have been made with published estimates for the Southland Region in the Statistics NZ Household income and housing-cost statistics which uses the Household Economic Survey (2018/2019) as its base. For the year ended June 2019, household income in the Southland Region was \$69,524. On the basis that district median household income equates to around 110% of region income, the resulting median household income for Southland District would be \$77,200 in June 2019.

intervening period. In addition, 2018 Census personal income data (released April 2020) shows that median personal income increased 7.1% across the district between 2013-2018 (1.42% per annum from \$33,900 to \$36,300). Using this, median household income in the district can be estimated to be \$69,200 in 2019 (8.5% above \$63,800 in 2013). As the income figure used in the analysis (\$70,562) falls between the two alternative estimates of \$69,200 and \$77,200, it is considered to be an appropriate estimation of median household income for the purposes of the analysis.

5. Median figures have been used in the analysis because median household income from the census is readily available. Median figures show the frequency midpoint – with half above and half below.
6. Deprivation scores for area units (which have been replaced by Statistical Area 2 geographies) have been calculated using the weighted average of NZDep2018_score values for Statistical Area 1 geographies (SA1), using the usually resident population URPpnSA1_2018.

Table 6: Details of rating units selected for household analysis

Land use category	Properties Selected for Household Analysis			All Properties		
	Rating Units	Total Rates (\$)	Property Value (capital) (\$)	Rating Units	Total Rates (\$)	Property Value (capital) (\$0)
Residential	7,362	19.6M	2.2B	9,513	21.4M	2.4B
Dwelling	7,075	18.7M	2.1B	7,096	18.7M	2.1B
Own Your Own Flats	197	524.4K	40.1M	261	524.4K	40.1M
Rental Flats	71	289.1K	21.8M	79	289.1K	23.0M
Home/Income	12	40.6K	5.4M	12	40.6K	5.4M
Multiple Dwelling	6	37.3K	5.6M	6	37.3K	5.6M
Converted Flats	1	3.9K	245.0K	1	3.9K	245.0K
Vacant Section				2,040	1.7M	175.5M
Vacant Block				17	52.7K	14.0M
Vacant Multi Unit				1	3.0K	345.0K
Lifestyle	2,151	4.2M	1.1B	3,246	5.1M	1.3B
Farmland Improved	2,151	4.2M	1.1B	2,189	4.3M	1.1B
Farmland Vacant				1,057	860.7K	192.0M
Dairy Farming	818	13.5M	5.8B	931	13.7M	6.1B
Farming	2,167	16.6M	8.0B	3,564	19.7M	10.1B
Pastoral Fattening	1,950	15.0M	7.2B	3,161	17.7M	9.1B
Specialist Deer	132	776.3K	342.9M	191	949.3K	456.7M
Pastoral Grazing	37	569.6K	309.8M	142	697.3K	441.6M
Specialist Horses	28	94.3K	36.4M	31	100.5K	37.1M
Arable Non-Irrigated	9	71.2K	35.4M	12	78.6K	38.8M
Pastoral Run	1	26.8K	15.4M	7	81.0K	46.8M
Horticulture Other	5	17.1K	7.3M	6	18.6K	8.2M
Specialist Poultry	2	6.4K	2.1M	3	8.9K	3.0M
Horticulture Flower	2	6.2K	2.8M	3	11.1K	5.1M
Specialist Pigs	1	7.9K	2.5M	1	7.9K	2.5M
Horticulture Glasshouse				3	2.7K	471.0K
Horticulture Market Garden				2	3.9K	1.5M
Specialist Aquaculture				1	3.2K	375.0K
Horticulture Berry				1	0.0K	2.8M
Forestry				552	1.2M	386.3M
Indigenous				209	95.1K	65.8M
Exotics				189	1.1M	135.4M
Protected				151	16.1K	183.7M
Vacant				3	12.4K	1.3M
Mining				24	306.8K	14.0M
Rock/Shingle				14	14.5K	422.7K
Limestone Quarry				4	157.1K	6.4M
Coal				4	133.6K	7.1M
Other				2	1.6K	38.5K

Land use category	Properties Selected for Household Analysis			All Properties		
	Rating Units	Total Rates (\$)	Property Value (capital) (\$)	Rating Units	Total Rates (\$)	Property Value (capital) (\$0)
Commercial				538	2.6M	359.7M
Retailing				186	643.4K	78.4M
Accommodation				107	1.1M	156.6M
Other Multiple Uses				60	224.4K	35.3M
Offices				36	117.0K	15.7M
Liquor				32	188.6K	17.7M
Vacant Provincial				14	32.5K	2.7M
Service Station				12	42.4K	5.5M
Tourism				11	62.2K	20.2M
Motor Vehicle				6	12.4K	1.8M
Elderly				5	109.1K	15.2M
Educational Uses				4	31.9K	5.1M
Parking				2	4.6K	565.0K
Health Operations				1	3.7K	800.0K
Vacant				62	40.6K	4.0M
Industrial				432	1.5M	354.4M
Light				187	457.4K	55.3M
Services				135	290.3K	28.3M
Other/Multiple Uses				29	46.1K	5.5M
Warehouse				14	51.4K	8.1M
Freezing				7	160.0K	68.3M
Heavy Manufacture				4	428.0K	175.9M
Noxious/Dangerous				1	19.2K	8.6M
Vacant				55	44.1K	4.4M
Other				1,528	1.0M	2.4B
Passive Reserve				624	52.3K	2.0B
Multiple				180	179.2K	42.3M
Utilities				138	263.0K	187.6M
Assembly Halls etc				113	99.3K	19.3M
Sporting				92	135.0K	44.4M
Educational				89	152.6K	98.2M
Religious				68	40.9K	18.6M
Health/Medical				13	16.5K	4.4M
Maori Sites				7	0.6K	844.3K
Specialist Other				6	35.5K	17.7M
Vacant				198	40.5K	3.4M
Total	12,498	54.0M	17.1B	20,328	66.6M	23.5B

Community and industry/business

The assumptions made in estimating the affordability of rates for industry/business properties in the Southland District are outlined below.

7. 7,569 industry/business rating units with total rates of \$40.1 million have been used for the industry/business analysis.
8. The breakdown of 2018 Southland District Gross Domestic Product (GDP) by industry classification was not available at the time of writing. MBIE's 2018 total GDP figure has been broken into industry types using the average percentage of industry GDP figures for 2015, 2016, 2017. Rates for Residential and Lifestyle land uses have been excluded from the GDP analysis. GDP estimates for GST on Production, Import Duties and Other Taxes have been excluded on the basis that the related land use cannot be determined.
9. Rates for the GDP industry classifications have been assigned on the basis of the land use descriptions in Council's rating information database to best match the industry classifications. Some GDP classifications have been combined because a selection of properties (and related land use type) were able to fit more than one GDP industry classification.
10. Table 7 outlines the groupings that have been used.

Table 7: Details of Industry Categories used for GDP analysis and allocation of rates based on land use types

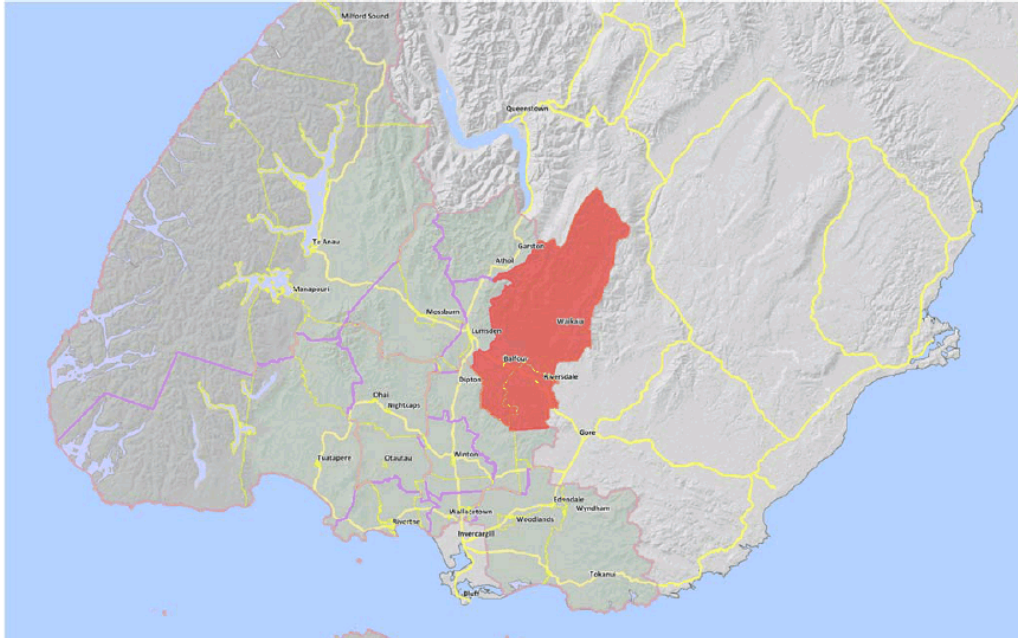
Grouped Industry Description	GDP Industry Classification	Property Land use Type	
Accommodation	Accommodation	Commercial Accommodation	
Agriculture	Agriculture	Dairy Farming Other - Specialist Other	Farming - excl Specialist Aquaculture
Forestry, Fishing, Mining, Utility Services	Forestry, Fishing, Mining, Electricity, Gas, Water and Waste Services Information Media, Telecommunications and Other Services	Forestry Exotics Forestry Indigenous Forestry Protected Forestry Vacant Other Utilities	Farming - Specialist Aquaculture Mining Coal Mining Limestone Quarry Mining Other Mining Rock/Shingle
Manufacturing	Manufacturing	Industrial Freezing Industrial Heavy Manufacture Industrial Light Industrial Services	Industrial Noxious/Dangerous Industrial Other/Multiple Uses Industrial Vacant Industrial Warehouse
Commercial - Trade and Transport	Food and beverage services Retail Trade Transport, Postal and Warehousing Wholesale Trade	Commercial Liquor Commercial Retailing Commercial Tourism Commercial Parking	Commercial Motor Vehicle Commercial Service Station
Commercial - Other	Administrative and Support Services Construction Financial and Insurance Services Owner-Occupied Property Operation Professional, Scientific and Technical Services Rental, Hiring and Real Estate Services	Commercial Vacant Commercial Vacant Provincial	Commercial Offices Commercial Other Multiple Uses
Education and Training	Education and Training	Other Educational	Commercial Education Uses
Health and Social Assistance	Health Care and Social Assistance	Commercial Elderly Commercial Health Operations	Other - Health/Medical Other - Religious
Other - Public Administration	Public Administration and Safety	Other Assembly Halls Other Maori Sites Other Multiple Other Sporting	Other Passive Reserve Other Religious Other Vacant
GST	GST on Production, Import Duties and Other Taxes	N/A	

Detailed household analysis (area unit and meshblock by community board)

The detailed rates affordability data for each area unit is included separately under each community board section in the document. The purple boundaries in maps show these community board areas - Ardlussa, Fiordland, Oraka Apanima, Wallace Takitimu, Tuatapere Te Waewae, Stewart Island/Rakiura, Waihopai Toetoe and Northern and Oreti (both of which include three subdivisions).

In addition, each area unit is made up of a number of meshblocks and rates affordability data has also been prepared for these meshblocks to provide show the spread of rates affordability within each area unit.

Ardlussa Community Board



The Ardlussa Community Board area contains four area units and 62 meshblocks. The area units that are either wholly or partly within community board area include:

- Balfour (whole) – the township urban area
- Riversdale (whole) – most of the township urban area
- Waikaiti (part) – the majority of the rural area in the board area, including the township of Waikaiti
- Kaweku (part) – the rural area at the south eastern part of the board area

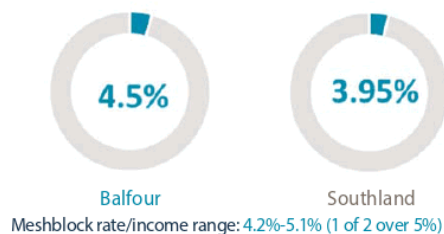
Balfour at a glance (urban area)

The Balfour area unit is fully contained within the Ardlussa Community Board.

Balfour Area Unit data – selected properties

	Balfour		Southland	
Population	126		29,617	
Households	54		11,523	
Median Income	\$55,985		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,526	\$2,317	\$2,789	\$2,592
Rating Units	64	(106)	12,498	(20,328)
Total Rates	\$0.16m	(\$0.2m)	\$53.9m	(\$66.6m)

Rates as a proportion of income

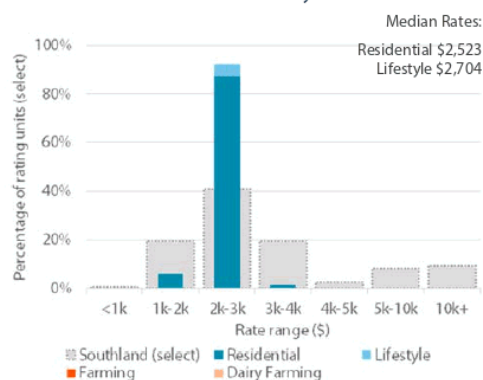


Distribution of household incomes

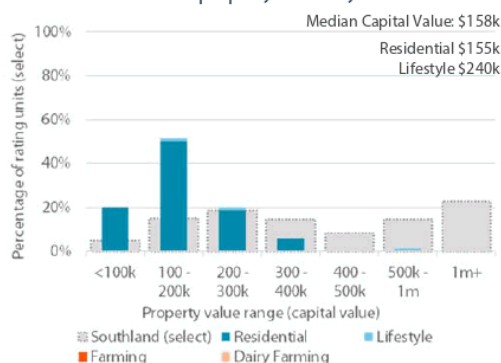
% low income households (earning under \$33,000): **28%** (15 households)



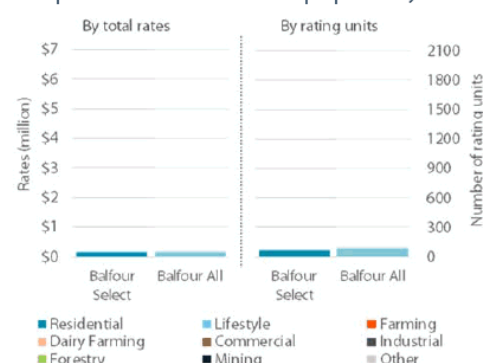
Distribution of rates by land use



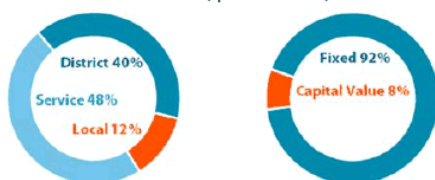
Distribution of property values by land use



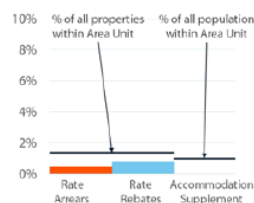
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



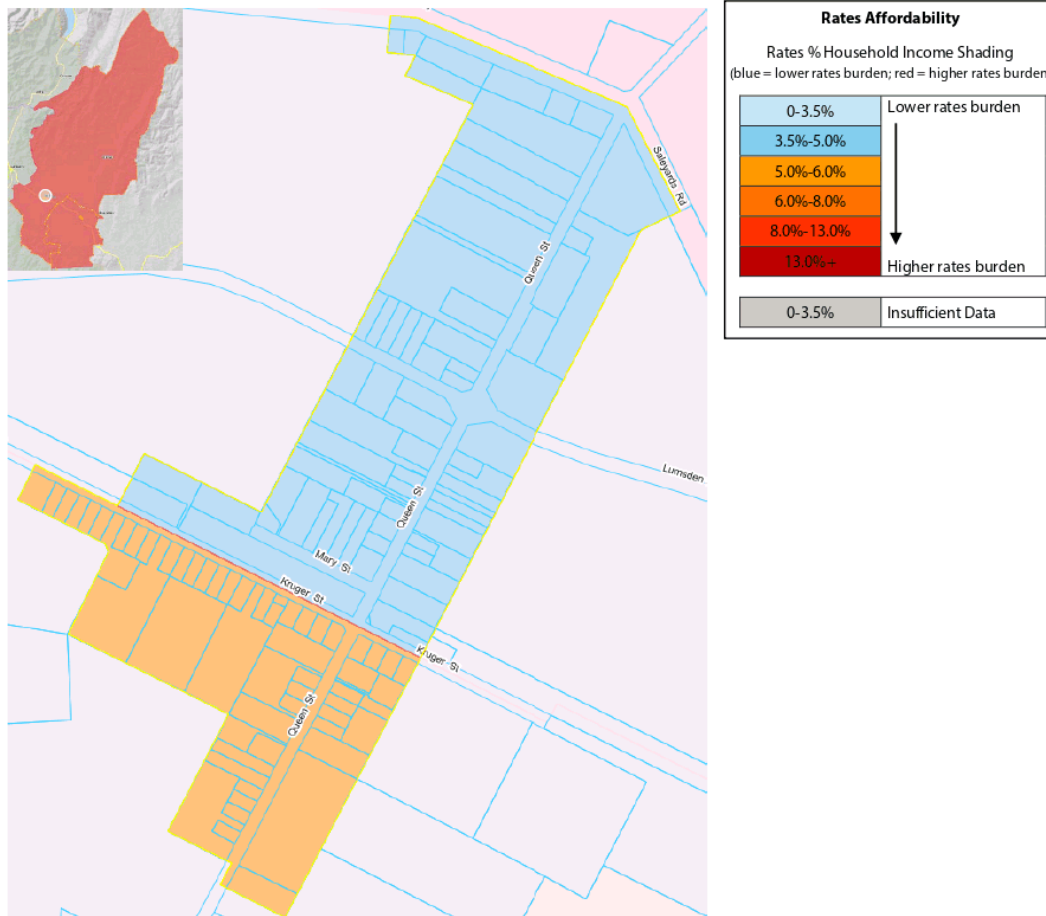
Share of rate arrears/rebates^{60Q} + accommodation supplement



Meshblock data – selected properties

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
3045700	63	0.21%	27	0.23%	\$49,789	\$2,516	5.05%	34	0.27%	17	\$81,944			3%	97%
3045800	63	0.21%	24	0.21%	\$60,853	\$2,526	4.15%	30	0.24%	1	\$75,061			\$240k	\$150k

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



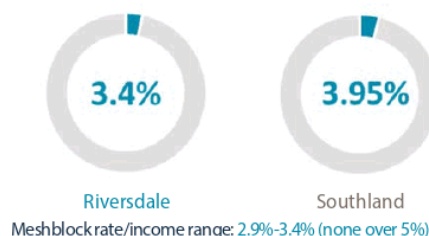
Riversdale at a glance (urban area)

The Riversdale area unit is fully contained within the Ardlussa Community Board.

Riversdale Area Unit data – selected properties

	Riversdale		Southland	
Population	372		29,617	
Households	159		11,523	
Median Income	\$63,619		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,165	\$2,129	\$2,789	\$2,592
Rating Units	185	(288)	12,498	(20,328)
Total Rates	\$0.4m	(\$0.5m)	\$53.9m	(\$66.6m)

Rates as a proportion of income

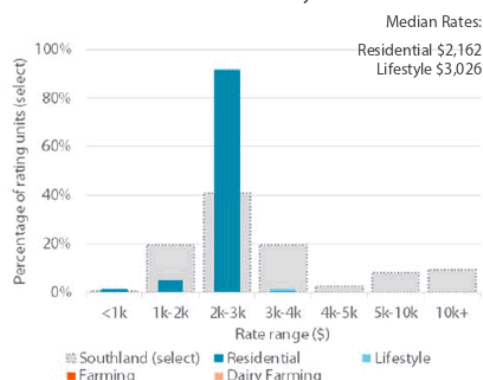


Distribution of household incomes

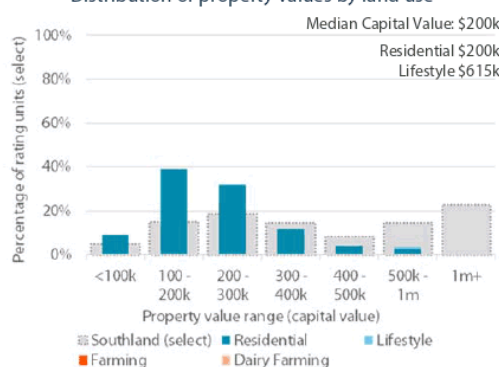
% low income households (earning under \$33,000): **13%** (21 households)



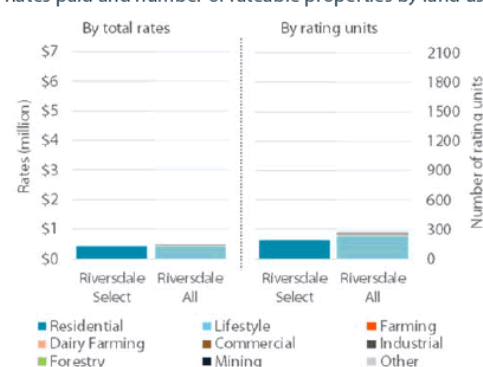
Distribution of rates by land use



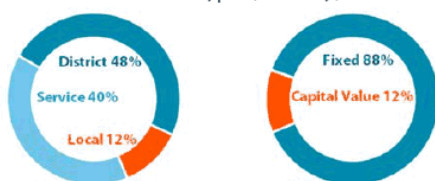
Distribution of property values by land use



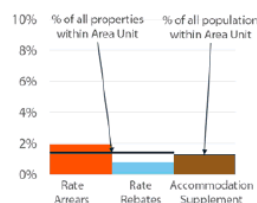
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



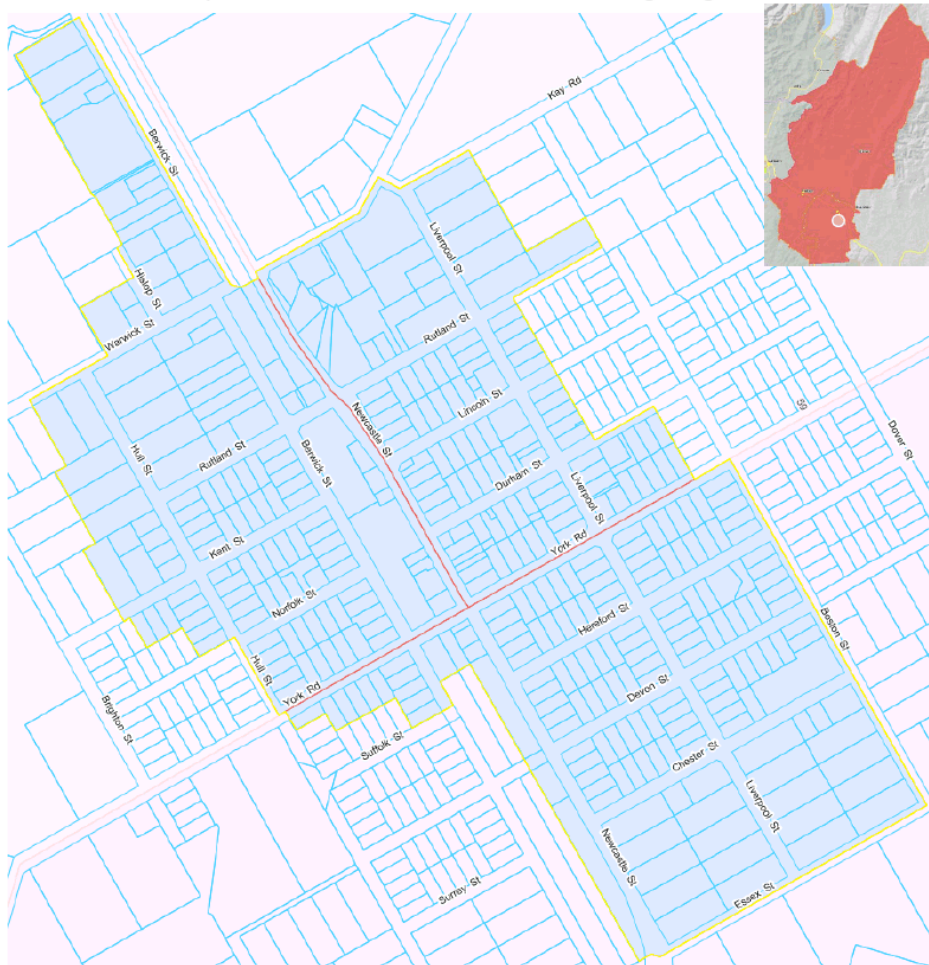
Share of rate arrears/rebates^{SDC} + accommodation supplement



Meshblock data – selected properties

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
3049900	138	0.47%	57	0.50%	\$63,619	\$2,177	3.42%	65	0.52%	3	\$141,133				
3050100	138	0.47%	63	0.55%	\$71,918	\$2,147	2.98%	74	0.59%	1	\$164,288				
3050000	99	0.33%	39	0.34%	\$74,684	\$2,147	2.87%	46	0.37%	1	\$96,919				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



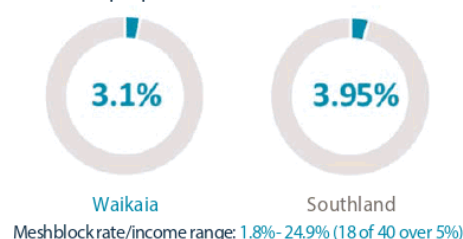
Waikaia at a glance (rural area split over multiple Community Boards)

The Waikaia area unit covers more than one community board (Ardlussa and Northern) with the majority of the area unit contained within Ardlussa. The area unit data below is for the entire area unit as 2013 Census income data is not currently available for each community board area. The meshblock data and map that follows shows only the meshblocks within area unit that fit within relevant board area.

Waikaia Area Unit data – selected properties

	Waikaia		Southland	
Population	1,656		29,617	
Households	642		11,523	
Median Income	\$74,352		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,340	\$1,825	\$2,789	\$2,592
Rating Units	663	(1,190)	12,498	(20,328)
Total Rates	\$4.5m	(\$5.4m)	\$53.9m	(\$66.6m)

Rates as a proportion of income

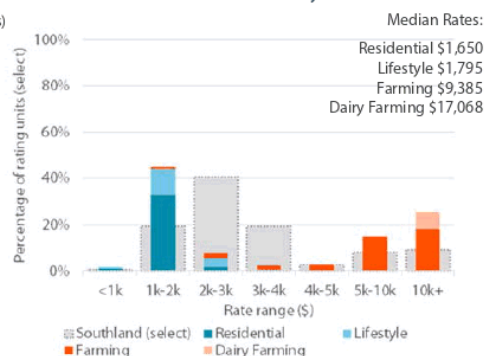


Distribution of household incomes

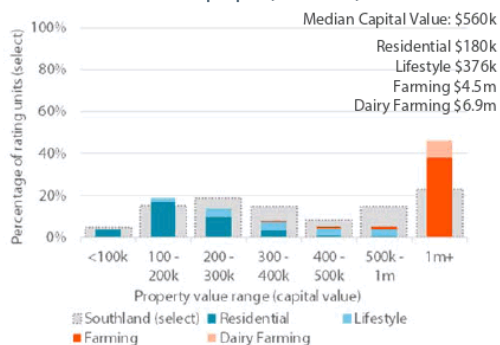
% low income households (earning under \$33,000): **13%** (81 households)



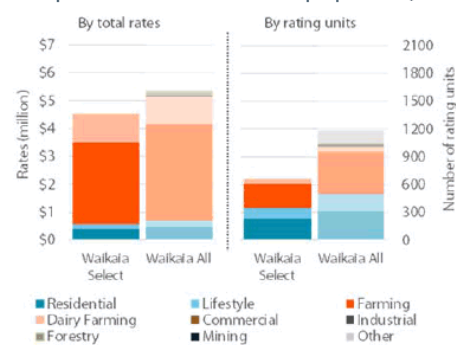
Distribution of rates by land use



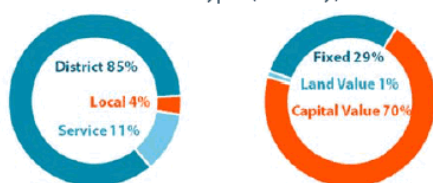
Distribution of property values by land use



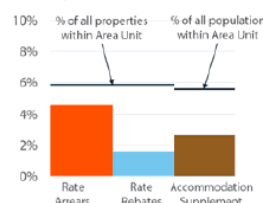
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^{SDC} + accommodation supplement



Meshblock data – selected properties

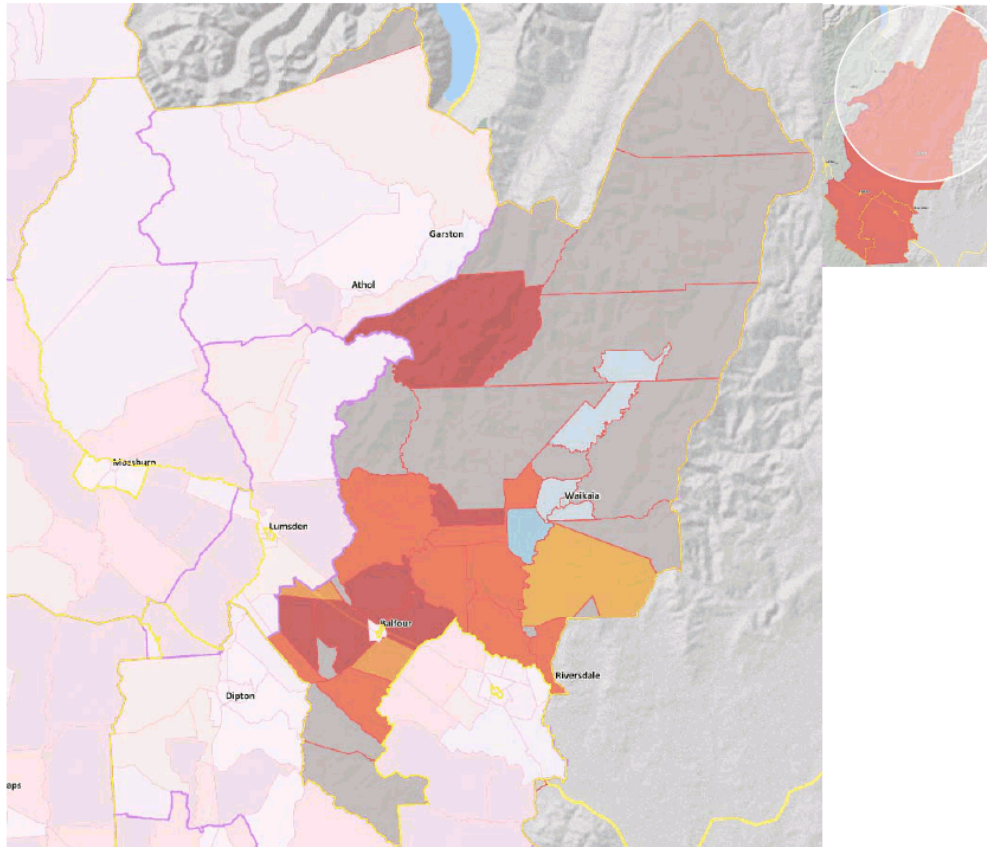
The meshblock data table and the map below shows the information for the meshblocks contained within Waikāia area unit within Ardlussa Community Board area. To view the meshblock and map data for this area unit within Northern Community Board area refer to page 63.

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
Within Ardlussa Community Board area															
3045002	36	0.12%	12	0.10%	\$71,918	\$17,934	24.94%	8	0.06%	8	\$140,907	62% \$6.6m	38% \$11.4m		
3042000	15	0.05%	6	0.05%	\$83,867	\$18,221	21.73%	3	0.02%	3	\$59,643	100% \$11.6m			
3045100	54	0.18%	21	0.18%	\$57,202	\$9,181	16.05%	14	0.11%	12	\$160,742	71% \$4.6m	15% \$10.7m	7% \$590k	7% \$150k
3046901	33	0.11%	12	0.10%	\$77,450	\$12,401	16.01%	5	0.04%	4	\$53,690	20% \$2.3m	60% \$7.1m	20% \$425k	
3045200	42	0.14%	21	0.18%	\$57,202	\$8,696	15.20%	16	0.13%	13	\$131,477	69% \$4.3m	13% \$3.2m	18% \$380k	
3044900	57	0.19%	21	0.18%	\$77,450	\$10,734	13.86%	18	0.14%	13	\$198,742	61% \$4.5m	17% \$7.2m	17% \$320k	6% \$165k
3047300	45	0.15%	18	0.16%	\$94,046	\$11,640	12.38%	16	0.13%	10	\$181,849	50% \$4.6m	31% \$8.1m	13% \$365k	6% \$275k
3044700	42	0.14%	18	0.16%	\$85,748	\$10,165	11.85%	15	0.12%	12	\$159,887	87% \$6m		13% \$340k	
3047200	48	0.16%	21	0.18%	\$71,918	\$8,338	11.59%	15	0.12%	10	\$139,310	60% \$4.4m	20% \$8.4m	13% \$460k	7% \$205k
3043100	21	0.07%	9	0.08%	\$94,046	\$10,594	11.26%	5	0.04%	5	\$53,379	100% \$5.8m			
3046100	72	0.24%	21	0.18%	\$85,748	\$9,626	11.23%	15	0.12%	13	\$158,119	80% \$5.4m	20% \$5.8m		
3047100	33	0.11%	15	0.13%	\$124,473	\$13,936	11.20%	11	0.09%	9	\$150,705	82% \$7.8m	9% \$4.8m	9% \$285k	
3046902	51	0.17%	18	0.16%	\$85,748	\$8,438	9.84%	11	0.09%	10	\$109,383	91% \$5.9m		9% \$185k	
3046002	21	0.07%	6	0.05%	\$77,450	\$7,509	9.70%	5	0.04%	3	\$32,885	80% \$4.3m		20% \$385k	
3047500	24	0.08%	9	0.08%	\$74,684	\$6,650	8.90%	9	0.07%	8	\$94,093	44% \$2.8m	44% \$7.3m	11% \$440k	
3045600	33	0.11%	12	0.10%	\$138,303	\$10,600	7.66%	8	0.06%	7	\$89,817	88% \$4.2m	12% \$6.8m		
3044802	21	0.07%	9	0.08%	\$119,826	\$7,467	6.23%	5	0.04%	3	\$43,585	60% \$3.8m	20% \$5.5m	20% \$170k	
3047401	36	0.12%	15	0.13%	\$94,046	\$5,413	5.76%	13	0.10%	10	\$84,203	76 \$3.6m	8% \$4.7m	8% \$170k	8% \$160k
3047000	27	0.09%	12	0.10%	\$60,853	\$2,273	3.74%	14	0.11%	5	\$75,280				
3043200	99	0.33%	51	0.44%	\$49,789	\$1,650	3.31%	133	1.06%	0	\$219,401				
3043300	33	0.11%	12	0.10%	\$71,918	\$1,714	2.38%	16	0.13%	0	\$28,475				
3042800	24	0.08%	9	0.08%	\$94,046	\$1,916	2.04%	8	0.06%	2	\$31,270				
3042600	30	0.10%	9	0.08%	\$55,321	\$1,117	2.02%	7	0.06%	1	\$69,341				
3043000	12	0.04%	6	0.05%	\$71,918	\$1,264	1.76%	8	0.06%	1	\$19,310				
3043500	12	0.04%	6	0.05%	...C	\$13,148	...C	4	0.03%	...C	\$93,060				
3043400	18	0.06%	3	0.03%	...C	\$25,573	...C	3	0.02%	...C	\$68,393				
3042700	3	0.01%	3	0.03%	...C	\$10,589	...C	3	0.02%	...C	\$31,986				
3042900	6	0.02%	3	0.03%	...C	\$12,779	...C	2	0.02%	...C	\$25,557				
3046800	18	0.06%	3	0.03%	...C	\$12,250	...C	2	0.02%	...C	\$24,499				
3041902	0	0.00%	0	0.00%	...C	\$19,604	...C	1	0.01%	...C	\$19,604				
3047403	3	0.01%	0	0.00%	...C	\$13,728	...C	1	0.01%	...C	\$13,728				
3047402	3	0.01%	0	0.00%	...C	\$6,544	...C	2	0.02%	...C	\$13,088				
3042500	3	0.01%	3	0.03%	...C	\$1,061	...C	12	0.10%	...C	\$12,730				
3044602	0	0.00%	0	0.00%	...C	\$11,981	...C	1	0.01%	...C	\$11,981				
3046200	0	0.00%	0	0.00%	...C	\$7,290	...C	1	0.01%	...C	\$7,290				

Assessing Southland rates affordability

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
3045500	9	0.03%	3	0.03%	...C	\$2,092	...C	3	0.02%	...C	\$5,886				
3071600	3	0.01%	0	0.00%	...C	\$5,804	...C	1	0.01%	...C	\$5,804				
3042400	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				
3045300	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				
3045400	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



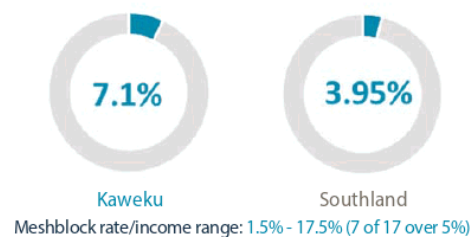
Kaweku at a glance (rural area split over multiple Community Boards)

The Kaweku area unit covers more than one community board (Ardlussa and Oreti) with the majority of the area unit contained within Ardlussa. The area unit data below is for the entire area unit as 2013 Census income data is not currently available for each community board area. The meshblock data and map that follows shows only the meshblocks within area unit that fit within relevant board area.

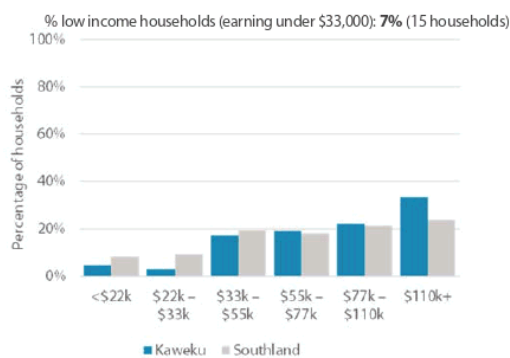
Kaweku Area Unit data – selected properties

	Kaweku		Southland	
Population	567		29,617	
Households	204		11,523	
Median Income	\$88,072		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$6,262	\$3,397	\$2,789	\$2,592
Rating Units	166	(306)	12,498	(20,328)
Total Rates	\$1.4m	(\$1.6m)	\$53.9m	(\$66.6m)

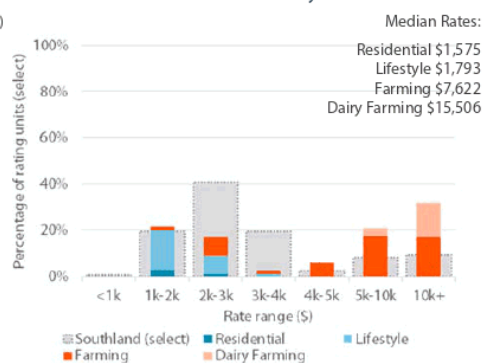
Rates as a proportion of income



Distribution of household incomes



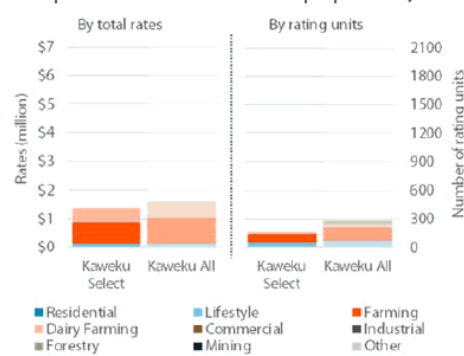
Distribution of rates by land use



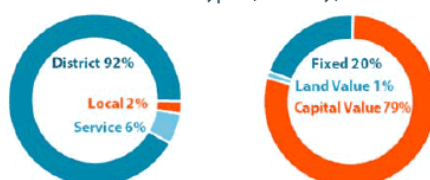
Distribution of property values by land use



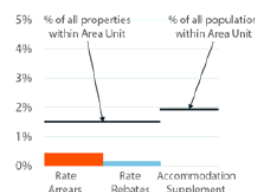
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^(SDC) + accommodation supplement

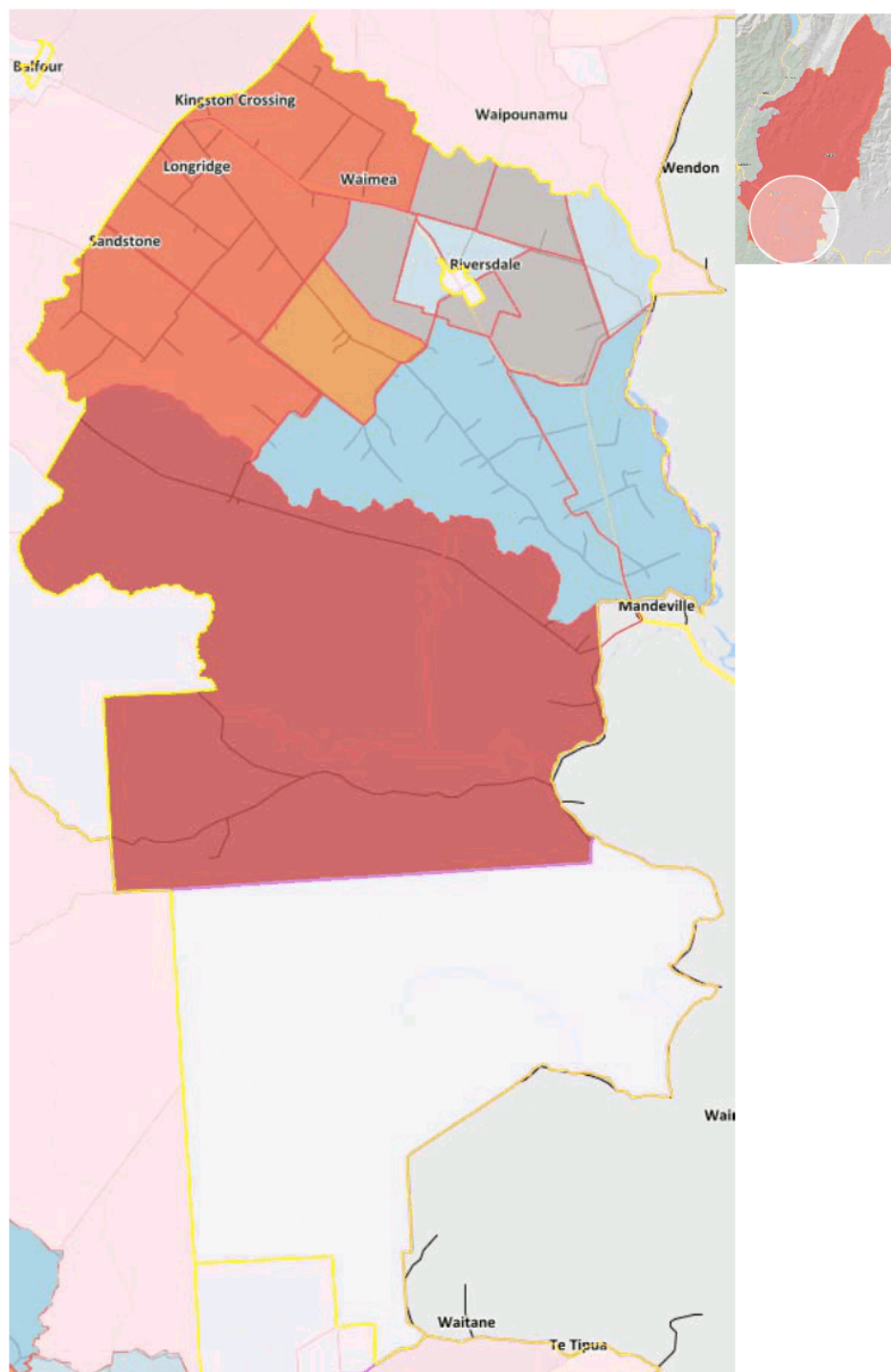


Meshblock data – selected properties

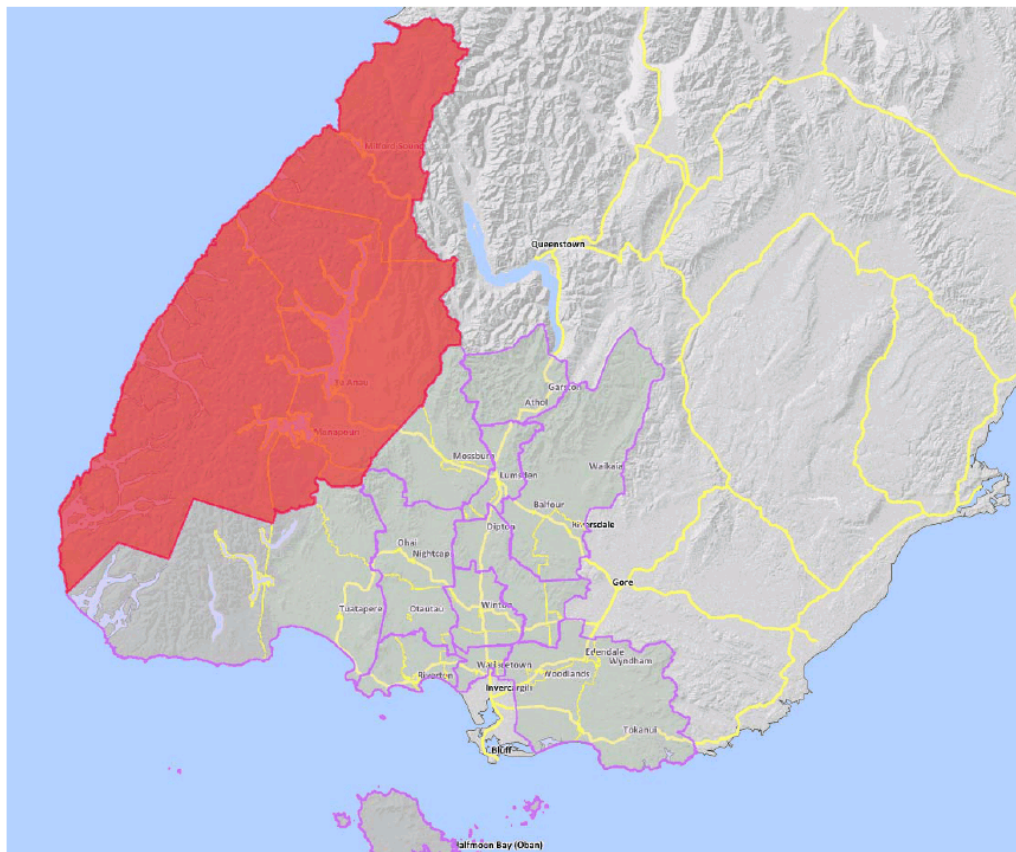
The meshblock data table and the map below shows the information for the meshblocks contained within Kaweku area unit within Ardlussa Community Board area. To view the meshblock and map data for this area unit within Oreti Community Board area refer to page 96.

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
Within Ardlussa Community Board area															
3049701	24	0.08%	9	0.08%	\$71,918	\$12,589	17.51%	4	0.03%	4	\$48,265	100% \$6.7m			
3049800	45	0.15%	21	0.18%	\$94,046	\$15,368	16.34%	10	0.08%	10	\$170,076	50% \$10.9m	50% \$7m		
3051900	21	0.07%	6	0.05%	\$71,918	\$11,244	15.63%	6	0.05%	6	\$80,406	100% \$7.6m			
3048300	57	0.19%	15	0.13%	\$94,046	\$10,143	10.79%	13	0.10%	8	\$131,442	46% \$4.8m	31% \$5.9m	23% \$620k	
3048700	51	0.17%	18	0.16%	\$82,982	\$7,653	9.22%	12	0.10%	8	\$147,909	42% \$2.6m	42% \$7.5m	16% \$380k	
3049400	36	0.12%	12	0.10%	\$116,175	\$10,319	8.88%	9	0.07%	7	\$102,942	78% \$4.6m	22% \$10.3m	17% \$380k	
3049300	21	0.07%	9	0.08%	\$105,110	\$7,748	7.37%	6	0.05%	4	\$42,646	33% \$2.9m	50% \$6.8m	17% \$260k	
3049500	72	0.24%	27	0.23%	\$102,344	\$4,356	4.26%	26	0.21%	12	\$147,343				
3049600	66	0.22%	21	0.18%	\$119,826	\$4,444	3.71%	14	0.11%	6	\$114,171				
3048900	33	0.11%	12	0.10%	\$71,918	\$2,312	3.21%	13	0.10%	2	\$38,625				
3048600	18	0.06%	9	0.08%	\$94,046	\$2,552	2.71%	5	0.04%	2	\$44,538				
3049000	33	0.11%	12	0.10%	\$138,303	\$2,121	1.53%	14	0.11%	1	\$38,825				
3048800	12	0.04%	3	0.03%	...C	\$11,167	...C	4	0.03%	...C	\$42,396				
3049200	9	0.03%	3	0.03%	...C	\$11,348	...C	3	0.02%	...C	\$41,532				
3048400	12	0.04%	3	0.03%	...C	\$31,075	...C	1	0.01%	...C	\$31,075				
3049100	15	0.05%	6	0.05%	...C	\$2,363	...C	6	0.05%	...C	\$29,963				
3048500	6	0.02%	3	0.03%	...C	\$13,885	...C	2	0.02%	...C	\$27,770				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



Fiordland Community Board



The Fiordland Community Board area contains seven area units and 64 meshblocks. The area units that are either wholly or partly within community board area include:

- Te Anau (whole) – the township urban area
- Manapouri (whole) – the township urban area with surrounding rural area
- Milford (whole) – the northern part of the board area, including Milford Sound
- Mararoa River (part) – the rural area running diagonally through the middle of the board area
- Te Waewae (part) – a small part of the rural area in the south east part of the board area
- Wairio (part) – a small part of the rural area in the south east part of the board area
- Fiordland (part) – the large conservation area in the south western part of the board area (contains no income data)

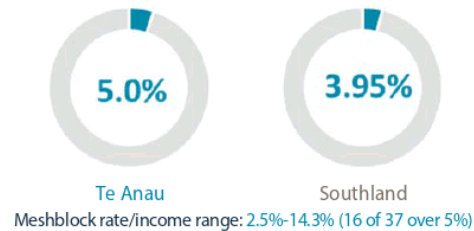
Te Anau at a glance (urban area)

The Te Anau area unit is fully contained within the Fiordland Community Board.

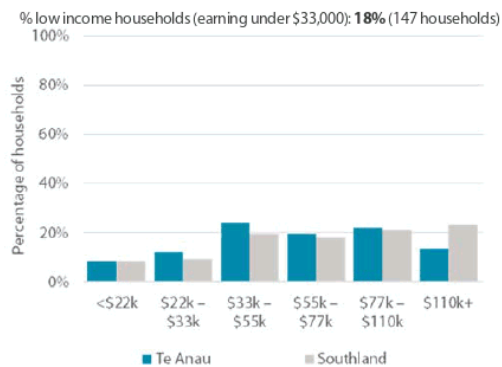
Te Anau Area Unit data – selected properties

	Te Anau		Southland	
Population	1,911		29,617	
Households	813		11,523	
Median Income	\$62,513		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$3,100	\$3,075	\$2,789	\$2,592
Rating Units	1,469	(2,079)	12,498	(20,328)
Total Rates	\$4.7m	(\$6.8m)	\$53.9m	(\$66.6m)

Rates as a proportion of income



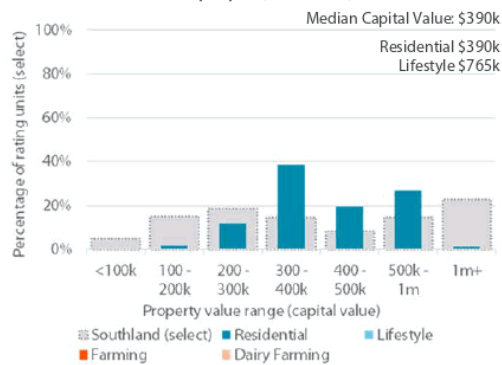
Distribution of household incomes



Distribution of rates by land use



Distribution of property values by land use



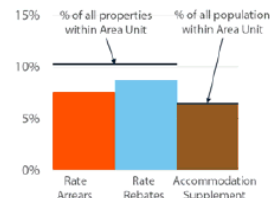
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



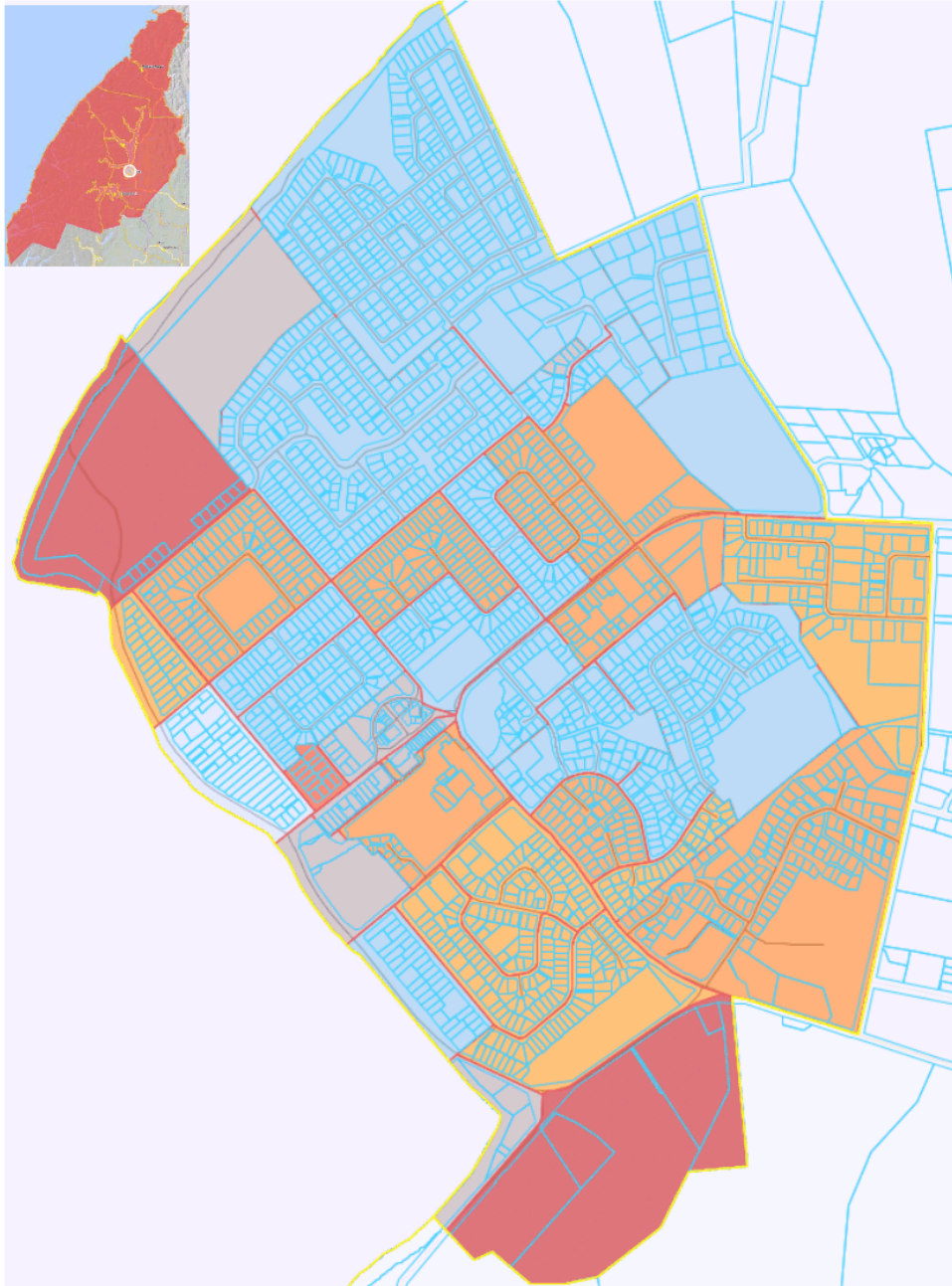
Share of rate arrears/rebates^(SDC) + accommodation supplement



Meshblock data – selected properties

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	Life5 % LU Av CV	Res % LU Av CV
3169600	21	0.07%	9	0.08%	\$30,427	\$4,363	14.34%	1	0.01%	1	\$4,363			100% \$910k	
3166800	12	0.04%	6	0.05%	\$24,895	\$3,304	13.27%	14	0.11%	14	\$50,332				100% \$533k
3167400	21	0.07%	6	0.05%	\$40,606	\$3,284	8.09%	4	0.03%	4	\$15,443				100% \$466k
3168500	9	0.03%	6	0.05%	\$41,491	\$3,150	7.59%	9	0.07%	9	\$27,949				100% \$458k
3167800	129	0.44%	54	0.47%	\$42,929	\$3,054	7.11%	84	0.67%	84	\$256,902				100% \$342k
3169000	42	0.14%	24	0.21%	\$49,789	\$3,238	6.50%	72	0.58%	68	\$227,663			1% \$620k	99% \$470k
3168100	102	0.34%	54	0.47%	\$47,023	\$3,042	6.47%	89	0.71%	87	\$269,707				100% \$350k
3168700	48	0.16%	12	0.10%	\$49,789	\$3,098	6.22%	20	0.16%	18	\$67,198				100% \$496k
3167000	90	0.30%	36	0.31%	\$49,789	\$3,082	6.19%	95	0.76%	95	\$295,920				100% \$379k
3168904	96	0.32%	36	0.31%	\$49,789	\$3,059	6.14%	55	0.44%	55	\$168,924				100% \$371k
3168905	54	0.18%	27	0.23%	\$52,555	\$3,064	5.83%	36	0.29%	36	\$111,808				100% \$391k
3168800	18	0.06%	9	0.08%	\$62,734	\$3,653	5.82%	3	0.02%	3	\$11,458				100% \$637k
3166900	27	0.09%	12	0.10%	\$60,853	\$3,352	5.51%	27	0.22%	25	\$97,401				100% \$695k
3169200	99	0.33%	51	0.44%	\$58,087	\$3,047	5.25%	62	0.50%	55	\$189,049				100% \$340k
3169100	111	0.38%	48	0.42%	\$60,853	\$3,061	5.03%	67	0.54%	46	\$207,569				100% \$388k
3169400	84	0.28%	36	0.31%	\$60,853	\$3,061	5.03%	46	0.37%	25	\$147,719				100% \$365k
3167900	48	0.16%	18	0.16%	\$60,853	\$3,037	4.99%	35	0.28%	16	\$109,978				
3168000	63	0.21%	30	0.26%	\$60,853	\$3,030	4.98%	51	0.41%	24	\$154,373				
3169300	33	0.11%	9	0.08%	\$60,853	\$3,002	4.93%	16	0.13%	7	\$52,437				
3167300	81	0.27%	39	0.34%	\$62,734	\$3,055	4.87%	74	0.59%	19	\$237,754				
3167601	72	0.24%	27	0.23%	\$68,266	\$3,284	4.81%	112	0.90%	29	\$367,122				
3168901	156	0.53%	57	0.50%	\$70,037	\$3,208	4.58%	112	0.90%	7	\$357,255				
3167700	216	0.73%	84	0.73%	\$71,918	\$3,243	4.51%	183	1.46%	13	\$600,040				
3167604	21	0.07%	9	0.08%	\$77,450	\$3,404	4.40%	10	0.08%	2	\$35,563				
3168902	66	0.22%	30	0.26%	\$71,918	\$3,156	4.39%	52	0.42%	1	\$177,137				
3173504	33	0.11%	12	0.10%	\$85,748	\$3,627	4.23%	20	0.16%	0	\$71,371				
3167200	21	0.07%	12	0.10%	\$71,918	\$3,028	4.21%	38	0.30%	0	\$116,424				
3168903	54	0.18%	21	0.18%	\$80,216	\$3,117	3.89%	37	0.30%	0	\$115,410				
3168600	39	0.13%	15	0.13%	\$80,216	\$3,053	3.81%	25	0.20%	2	\$79,566				
3167100	24	0.08%	9	0.08%	\$138,303	\$3,412	2.47%	14	0.11%	0	\$51,325				
3167500	3	0.01%	0	0.00%	...C	\$3,075	...C	2	0.02%	...C	\$6,149				
3167602	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				
3167603	6	0.02%	3	0.03%	...C	\$3,069	...C	4	0.03%	...C	\$12,451				
3168200	15	0.05%	6	0.05%	...C	#DIV/0!	...C	0	0.00%	...C	\$0				
3168300	6	0.02%	3	0.03%	...C	#DIV/0!	...C	0	0.00%	...C	\$0				
3168400	0	0.00%	0	0.00%	...C	#DIV/0!	...C	0	0.00%	...C	\$0				
3169500	0	0.00%	0	0.00%	...C	#DIV/0!	...C	0	0.00%	...C	\$0				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



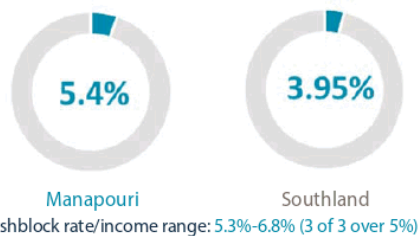
Manapouri at a glance (urban and rural area)

The Manapouri area unit is fully contained within the Fiordland Community Board.

Manapouri Area Unit data – selected properties

	Manapouri		Southland	
Population	228		29,617	
Households	105		11,523	
Median Income	\$55,764		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$3,010	\$2,990	\$2,789	\$2,592
Rating Units	244	(339)	12,498	(20,328)
Total Rates	\$0.8m	(\$1.0m)	\$53.9m	(\$66.6m)

Rates as a proportion of income

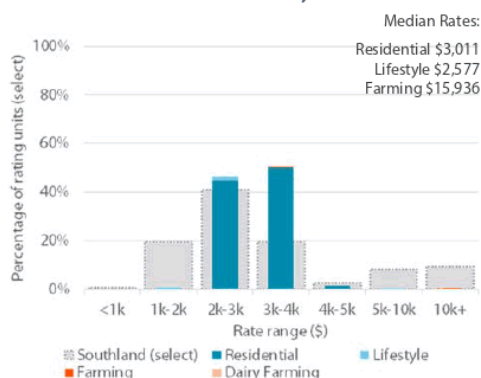


Distribution of household incomes

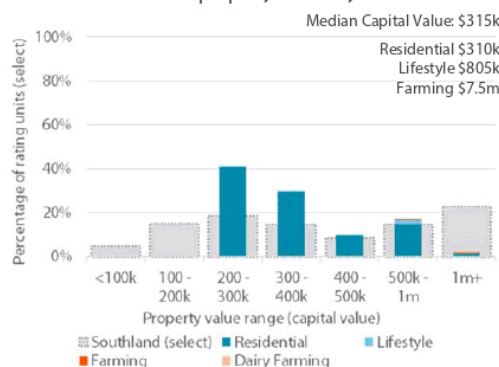
% low income households (earning under \$33,000): **20%** (21 households)



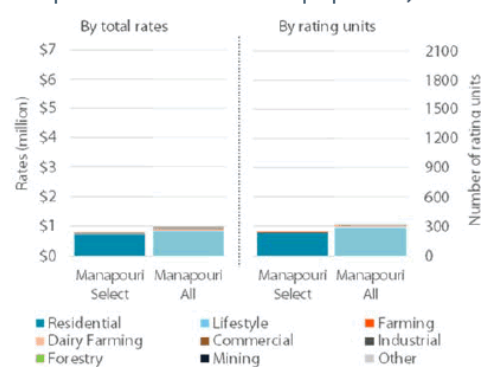
Distribution of rates by land use



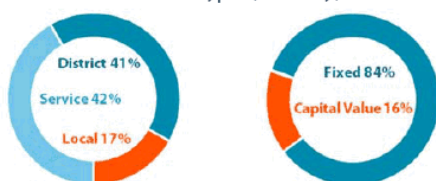
Distribution of property values by land use



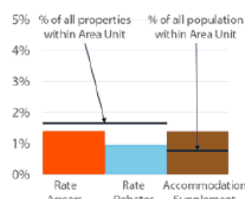
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



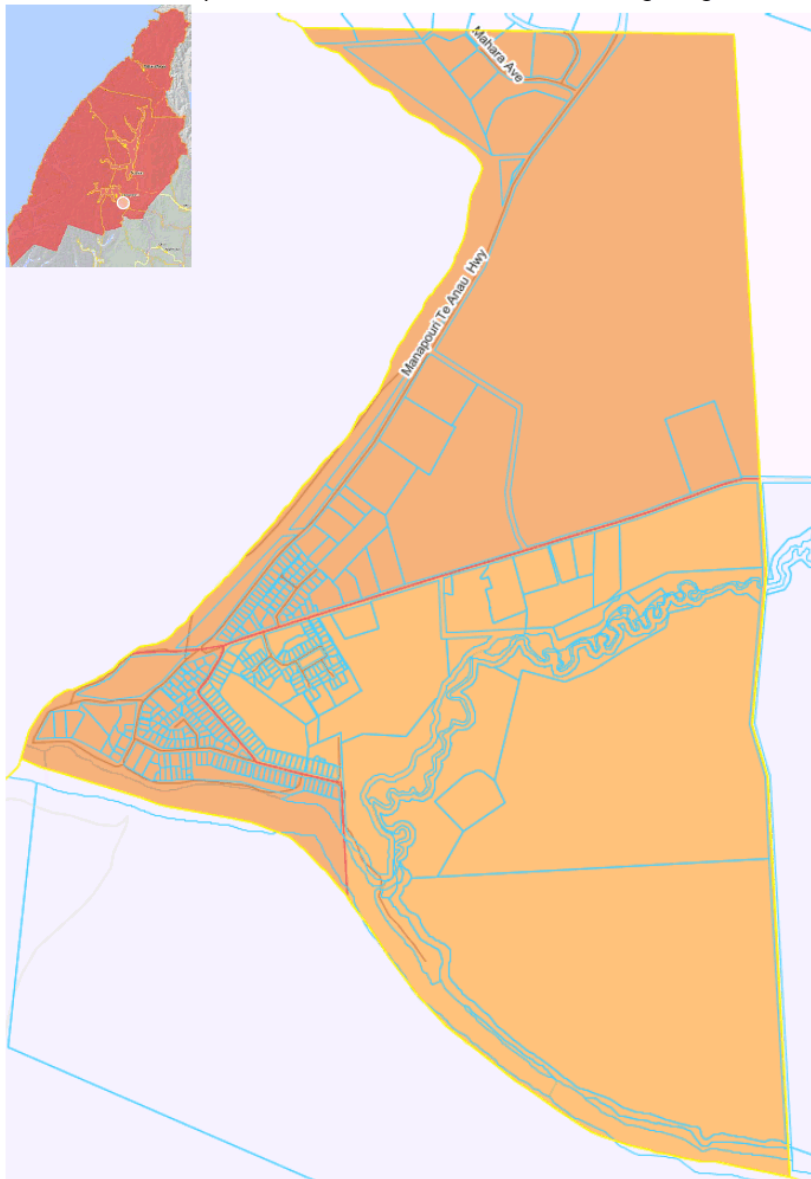
Share of rate arrears/rebates^{SDC} + accommodation supplement



Meshblock data – selected properties

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
3172200	54	0.18%	18	0.16%	\$49,789	\$3,367	6.76%	41	0.33%	41	\$163,728	2% \$14.2m		2%	96%
3172400	66	0.22%	30	0.26%	\$48,904	\$3,032	6.20%	97	0.78%	97	\$297,795				100%
3172300	108	0.37%	54	0.47%	\$56,206	\$2,986	5.31%	106	0.85%	101	\$320,633			6%	94%

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



Mararoa River at a glance (rural area split over multiple Community Boards)

The Mararoa River area unit covers more than one community board (Fiordland and Northern) with the majority of the area unit contained within Fiordland. The area unit data below is for the entire area unit as 2013 Census income data is not currently available for each community board area. The meshblock data and map that follows shows only the meshblocks within area unit that fit within relevant board area.

Mararoa River Area Unit data – selected properties

	Mararoa River		Southland	
Population	1,587		29,617	
Households	594		11,523	
Median Income	\$83,314		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$3,397	\$3,132	\$2,789	\$2,592
Rating Units	552	(987)	12,498	(20,328)
Total Rates	\$3.8m	(\$4.7m)	\$53.9m	(\$66.6m)

Rates as a proportion of income



Mararoa River



Southland

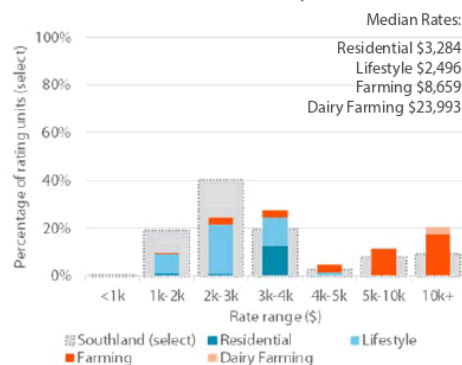
Meshblock rate/income range: 2.8%-72.8% (5 of 14 over 5%)

Distribution of household incomes

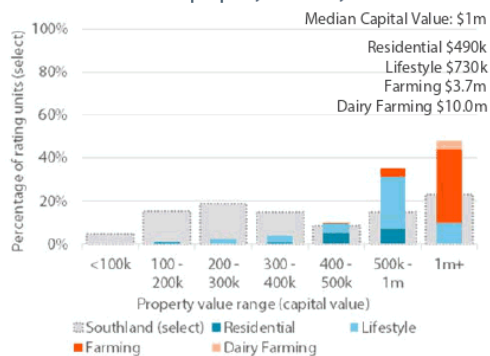
% low income households (earning under \$33,000): 8% (48 households)



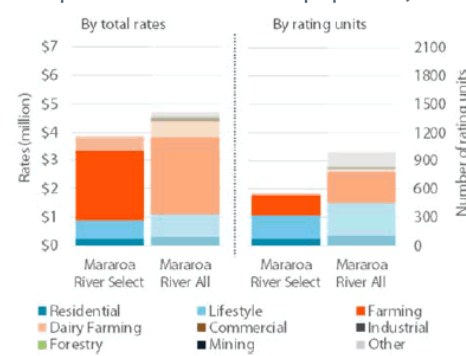
Distribution of rates by land use



Distribution of property values by land use



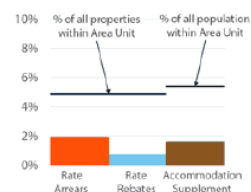
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^{SDC} + accommodation supplement

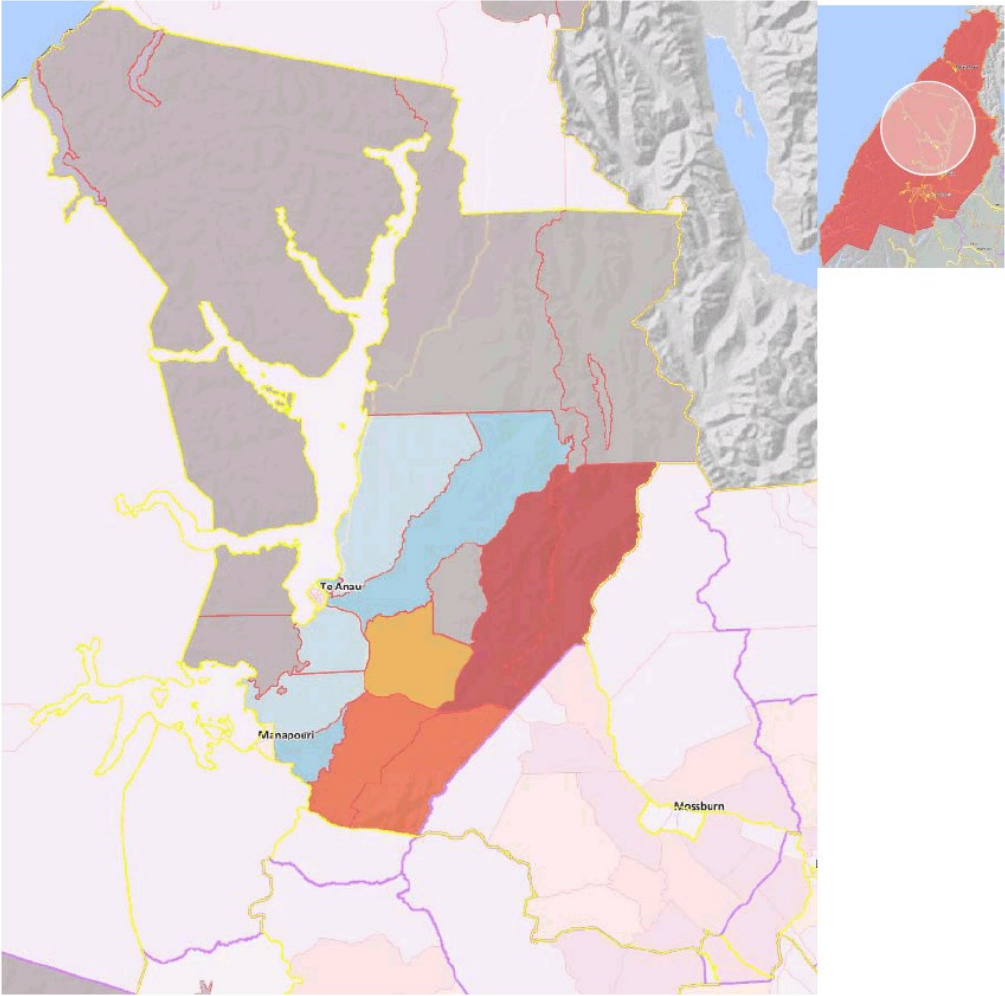


Meshblock data – selected properties

The meshblock data table and map below shows the information for the meshblocks contained within Mararoa River area unit within Fiordland Community Board area. To view the meshblock and map data for this area unit within Northern Community Board area refer to page 60.

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
Within Fiordland Community Board area															
3172802	12	0.04%	6	0.05%	\$46,138	\$33,570	72.76%	1	0.01%	1	\$33,570	100% \$17.6m			
3172804	36	0.12%	15	0.13%	\$60,853	\$11,946	19.63%	12	0.10%	8	\$159,793	58% \$10.6m	8% \$6.8m	8% \$375k	26% \$151k
3172900	24	0.08%	9	0.08%	\$138,303	\$14,743	10.66%	6	0.05%	5	\$92,693	83% \$9.6m		17% \$340k	
3172600	78	0.26%	33	0.29%	\$94,046	\$9,387	9.98%	31	0.25%	24	\$387,804	77% \$6.1m		20% \$380k	3% \$175k
3172700	117	0.40%	39	0.34%	\$99,578	\$5,363	5.39%	38	0.30%	20	\$286,220	71% \$3.7m	3% \$6m	26% \$572k	
3173502	282	0.95%	105	0.91%	\$75,569	\$3,284	4.35%	140	1.12%	24	\$579,588				
3172500	66	0.22%	24	0.21%	\$94,046	\$3,396	3.61%	16	0.13%	6	\$92,148				
3173503	63	0.21%	27	0.23%	\$102,344	\$3,617	3.53%	36	0.29%	1	\$133,395				
3173501	108	0.37%	42	0.37%	\$79,331	\$2,666	3.36%	45	0.36%	5	\$158,430				
3172000	255	0.86%	93	0.81%	\$85,748	\$2,728	3.18%	102	0.82%	14	\$365,020				
3172100	48	0.16%	18	0.16%	\$94,046	\$2,593	2.76%	24	0.19%	6	\$227,474				
3172803	6	0.02%	0	0.00%	...C	\$21,009	...C	1	0.01%	...C	\$21,009				
3173401	6	0.02%	6	0.05%	...C	\$7,428	...C	2	0.02%	...C	\$14,856				
3173403	6	0.02%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



Milford at a glance (rural area)

The Milford area unit is fully contained within the Fiordland Community Board.

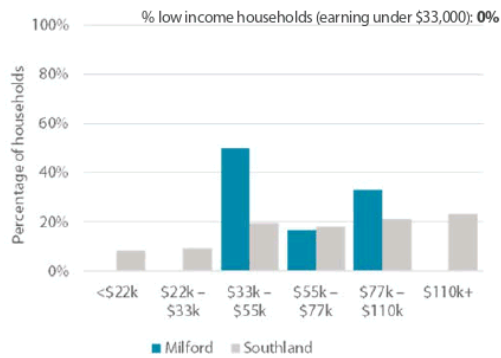
Milford Area Unit data – selected properties

	Milford		Southland	
Population	117		29,617	
Households	30		11,523	
Median Income	\$52,555		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,054	\$2,050	\$2,789	\$2,592
Rating Units	20	(75)	12,498	(20,328)
Total Rates	\$45k	(\$98k)	\$53.9m	(\$66.6m)

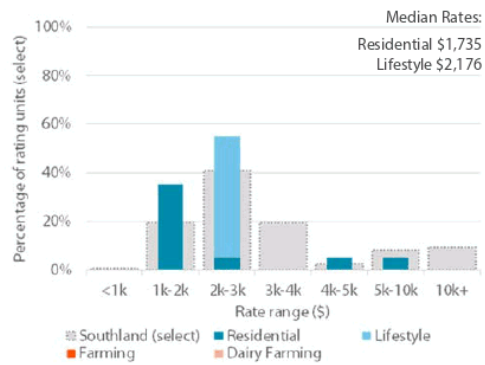
Rates as a proportion of income



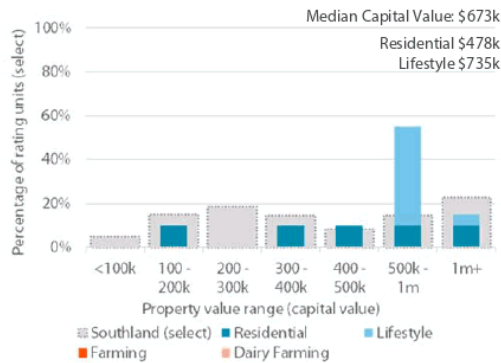
Distribution of household incomes



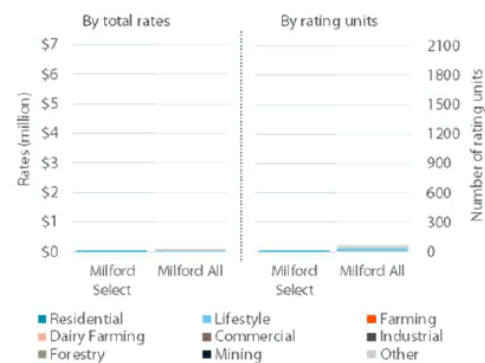
Distribution of rates by land use



Distribution of property values by land use



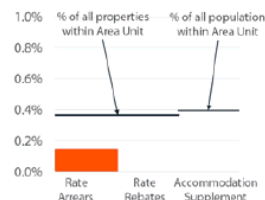
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



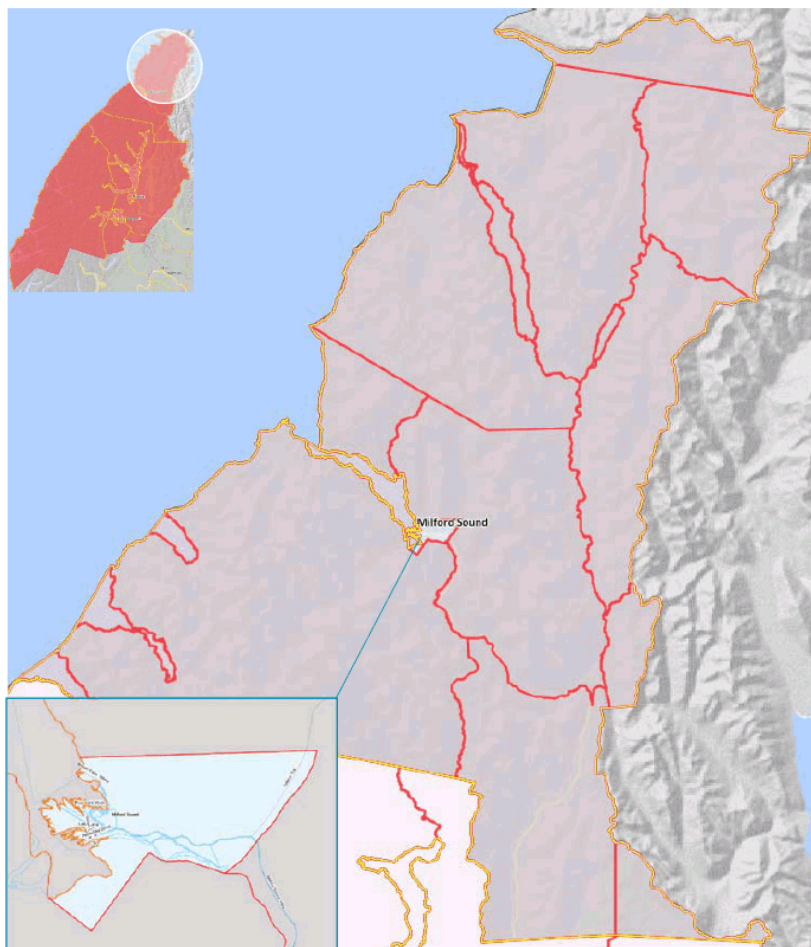
Share of rate arrears/rebates^{SDC} + accommodation supplement



Meshblock data – selected properties

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	Life5 % LU Av CV	Res. % LU Av CV
3174900	96	0.32%	24	0.21%	\$69,152	\$1,705	2.47%	7	0.06%	2	\$18,489				
3175900	0	0.00%	0	0.00%	...C	\$2,058	...C	7	0.06%	...C	\$15,326				
3175801	0	0.00%	0	0.00%	...C	\$2,145	...C	5	0.04%	...C	\$10,542				
3175100	3	0.01%	0	0.00%	...C	\$1,302	...C	1	0.01%	...C	\$1,302				
3174400	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				
3174700	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				
3174800	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



Te Waewae at a glance (rural area split over multiple Community Boards)

The Te Waewae area unit covers more than one community board (Tuatapere Te Waewae, Oraka Aparima and Fiordland) with the majority of the area unit contained within Tuatapere Te Waewae. The area unit data below is for the entire area unit as 2013 Census income data is not currently available for each community board area. The meshblock data and map that follows shows only the meshblocks within area unit that fit within relevant board area.

Te Waewae Area Unit data – selected properties

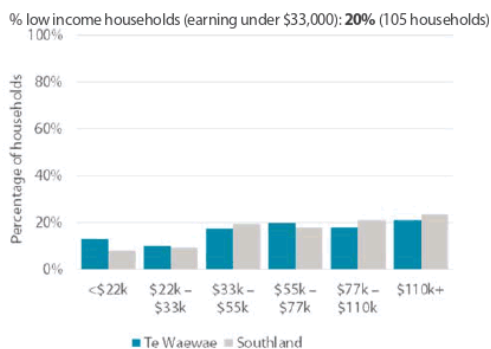
	Te Waewae		Southland	
Population	1,380		29,617	
Households	534		11,523	
Median Income	\$65,168		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,043	\$1,608	\$2,789	\$2,592
Rating Units	604	(1,419)	12,498	(20,328)
Total Rates	\$2.6m	(\$3.5m)	\$53.9m	(\$66.6m)

Rates as a proportion of income

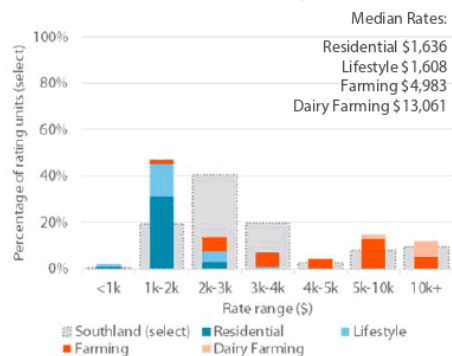


Meshblock rate/income range: No data

Distribution of household incomes



Distribution of rates by land use



Distribution of property values by land use



Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^(SDC) + accommodation supplement

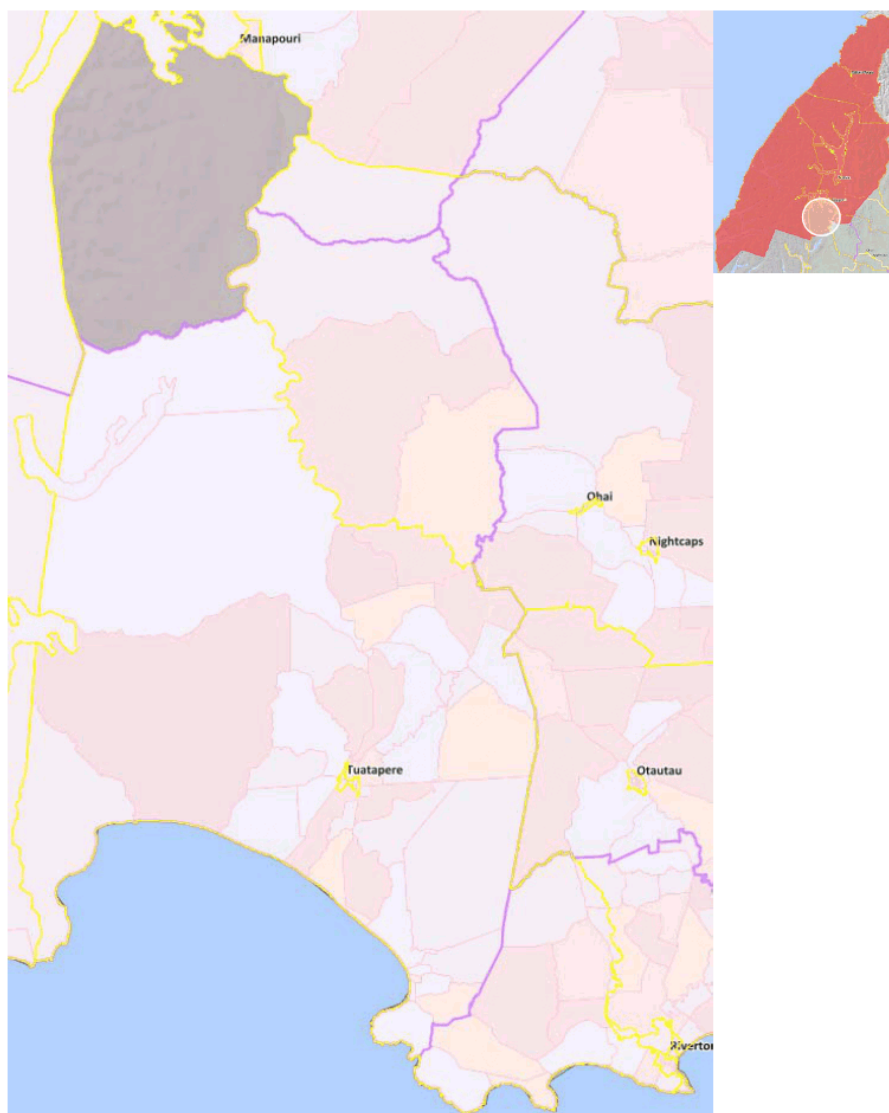


Meshblock data – selected properties

The meshblock data table and map below shows the information for the meshblocks contained within Te Waewae area unit within Fiordland Community Board area. To view the meshblock and map data for this area unit within other board areas refer to the relevant community board section (Tuatapere Te Waewae on page 113 and Oraka Aparima on page 77).

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
Within Fiordland Community Board area															
3191600	3	0.01%	3	0.03%	...C	...C	N/A	0	0.00%	...C	\$0				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



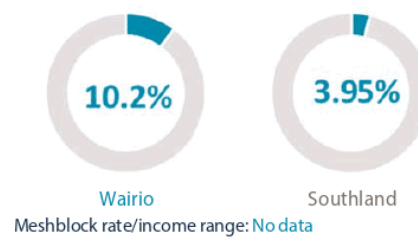
Wairio at a glance (rural area split over multiple Community Boards)

The Wairio area unit covers more than one community board (Wallace Takitimu, Tuatapere Te Waewae, Fiordland and Northern) with the majority of the area unit contained within Wallace Takitimu. The area unit data below is for the entire area unit as 2013 Census income data is not currently available for each community board area. The meshblock data and map that follows shows only the meshblocks within area unit that fit within relevant board area.

Wairio Area Unit data – selected properties

	Wairio		Southland	
Population	942		29,617	
Households	354		11,523	
Median Income	\$71,364		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$7,275	\$3,186	\$2,789	\$2,592
Rating Units	243	(460)	12,498	(20,328)
Total Rates	\$2.3m	(\$2.8m)	\$53.9m	(\$66.6m)

Rates as a proportion of income

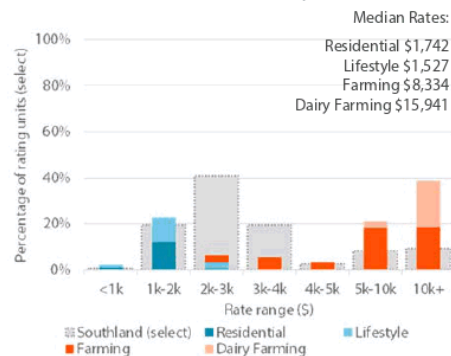


Distribution of household incomes

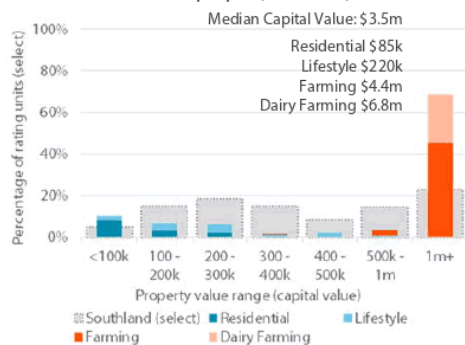
% low income households (earning under \$33,000): 10% (36 households)



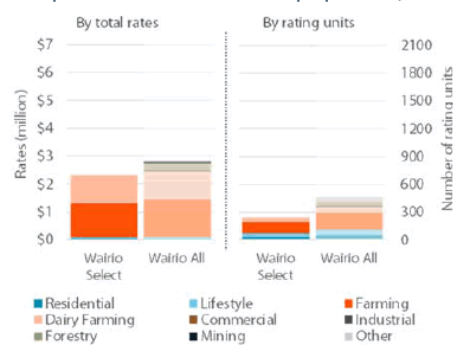
Distribution of rates by land use



Distribution of property values by land use



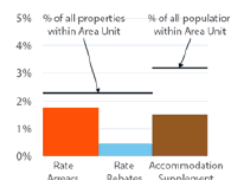
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^(SDQ) + accommodation supplement

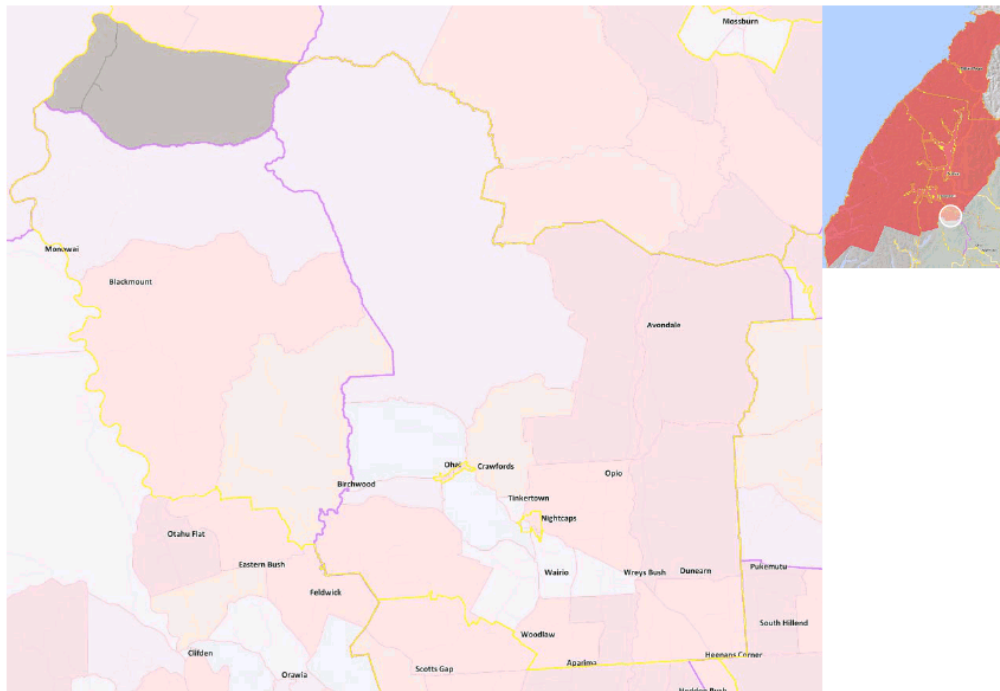


Meshblock data – selected properties

The meshblock data table and map below shows the information for the meshblocks contained within Wairio area unit within Fiordland Community Board area. To view the meshblock and map data for this area unit within other board areas refer to the relevant community board section (Wallace Takitimu on page 148, Tuatapere Te Waewae on page 116 and Northern on page 66).

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
Within Fiordland Community Board area															
3181700	6	0.02%	3	0.03%	...C	\$30,743	...C	1	0.01%	...C	\$30,743				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



Fiordland (no income data)

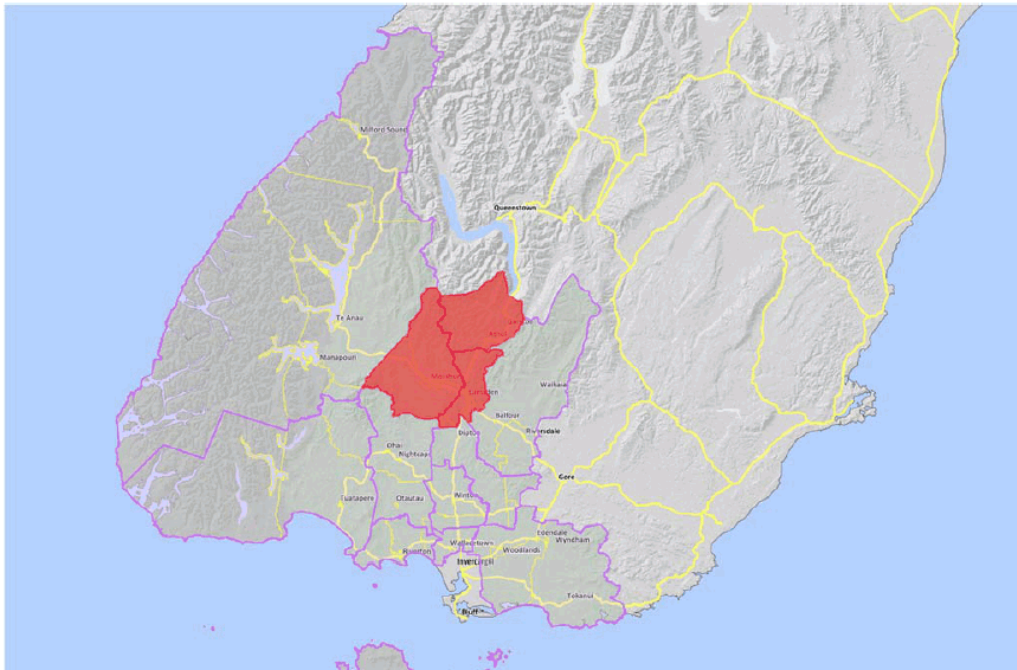
The Fiordland area unit covers more than one community board (Tuatapere Te Waewae and Fiordland) with the majority of the area unit contained within Fiordland.

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)

As there is no income data for this area unit, the rates affordability analysis cannot be completed.



Northern Community Board



The Northern Community Board area contains six area units and 51 meshblocks. The area units that are either wholly or partly within community board area include:

- Lumsden (whole) – the township urban area
- Mossburn (whole) – the township urban area with surrounding rural area
- Mararoa River (part) – the rural area in the southern part of the board area
- Waikaia (part) – the rural area in the north part of the board area including Athol and Garston townships
- Wairio (part) – a very small section of the rural area in the southern part of the board area
- Hokonui (part) – a small section of the rural area in the southern part of the board area

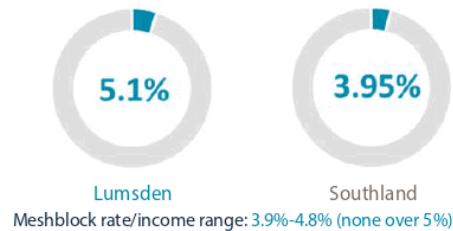
Lumsden at a glance (urban area)

The Lumsden area unit is fully contained within the Northern Community Board.

Lumsden Area Unit data – selected properties

	Lumsden		Southland	
Population	405		29,617	
Households	177		11,523	
Median Income	\$53,108		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,686	\$2,653	\$2,789	\$2,592
Rating Units	220	(385)	12,498	(20,328)
Total Rates	\$0.6m	(\$0.8m)	\$53.9m	(\$66.6m)

Rates as a proportion of income



Distribution of household incomes

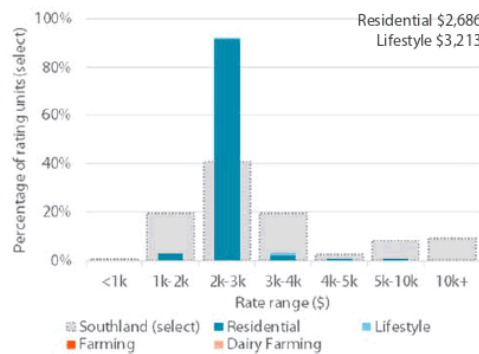
% low income households (earning under \$33,000): 29% (51 households)



Distribution of rates by land use

Median Rates:

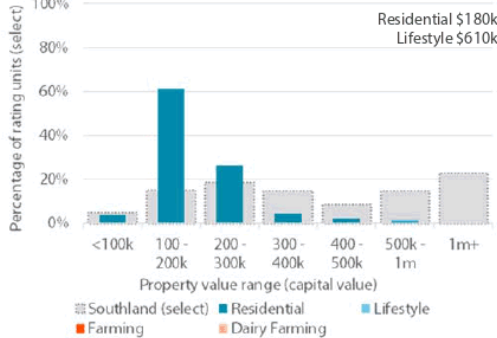
Residential \$2,686
Lifestyle \$3,213



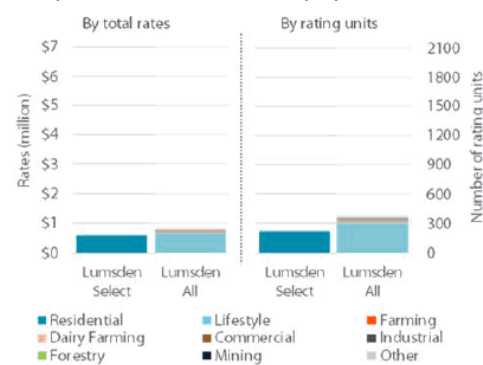
Distribution of property values by land use

Median Capital Value: \$180k

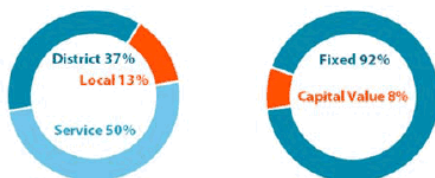
Residential \$180k
Lifestyle \$610k



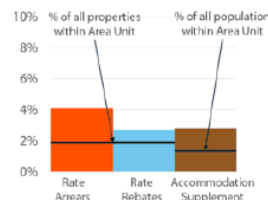
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



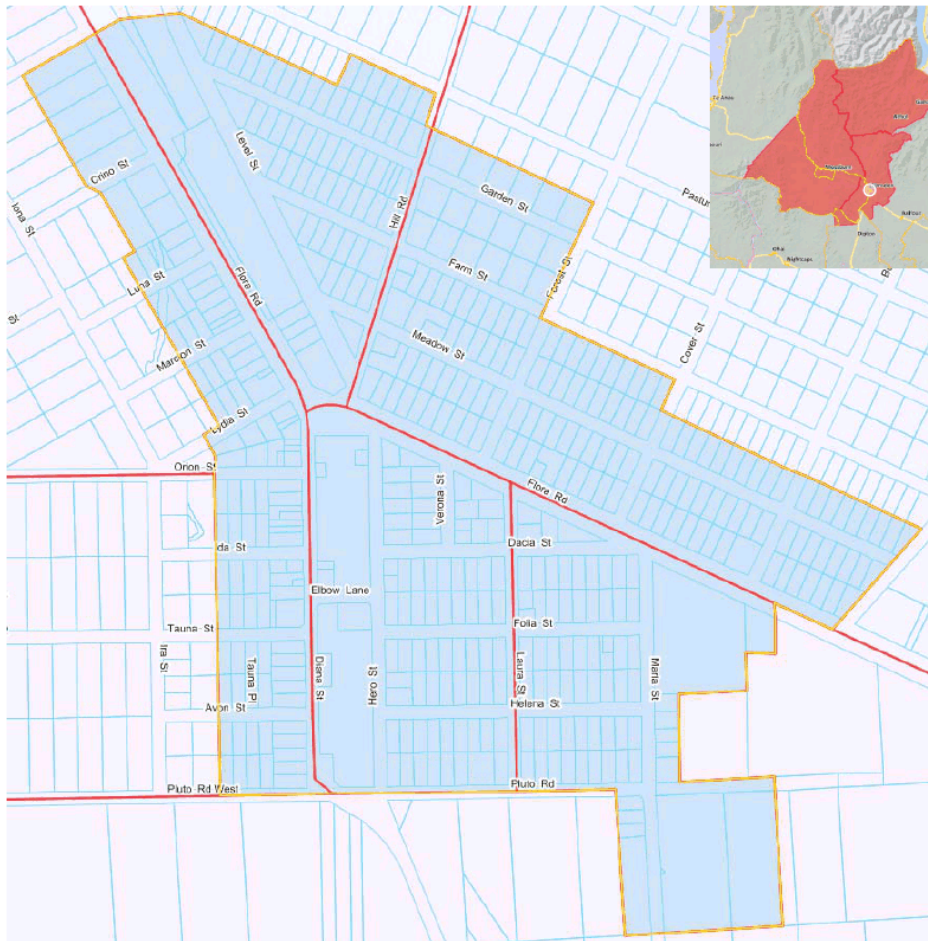
Share of rate arrears/rebates^{SDC} + accommodation supplement



Meshblock data – selected properties

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	Life5 % LU Av CV	Res % LU Av CV
3044300	117	0.40%	57	0.50%	\$55,764	\$2,700	4.84%	61	0.49%	8	\$170,215				
3044200	51	0.17%	27	0.23%	\$57,202	\$2,692	4.71%	28	0.22%	4	\$76,848				
3044400	63	0.21%	27	0.23%	\$60,853	\$2,667	4.38%	44	0.35%	2	\$118,054				
3044100	84	0.28%	33	0.29%	\$68,266	\$2,720	3.99%	44	0.35%	0	\$119,115				
3044500	90	0.30%	33	0.29%	\$68,266	\$2,667	3.91%	43	0.34%	0	\$110,483				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



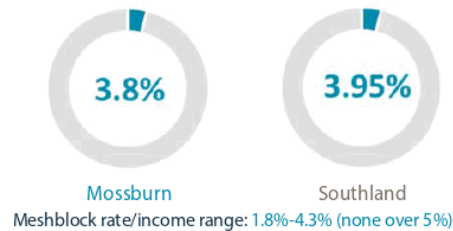
Mossburn at a glance (urban and rural area)

The Mossburn area unit is fully contained within the Northern Community Board.

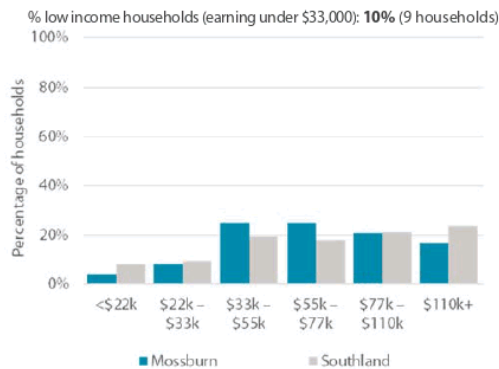
Mossburn Area Unit data – selected properties

	Mossburn		Southland	
Population	210		29,617	
Households	87		11,523	
Median Income	\$58,973		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,262	\$2,244	\$2,789	\$2,592
Rating Units	97	(172)	12,498	(20,328)
Total Rates	\$0.3m	(\$0.4m)	\$53.9m	(\$66.6m)

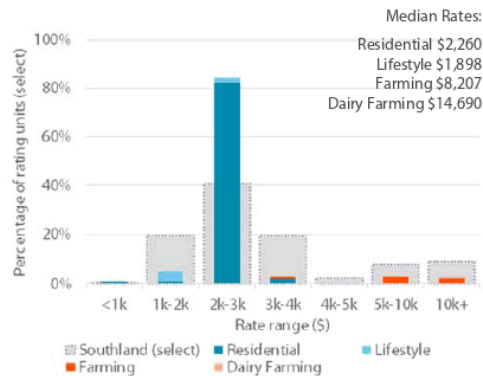
Rates as a proportion of income



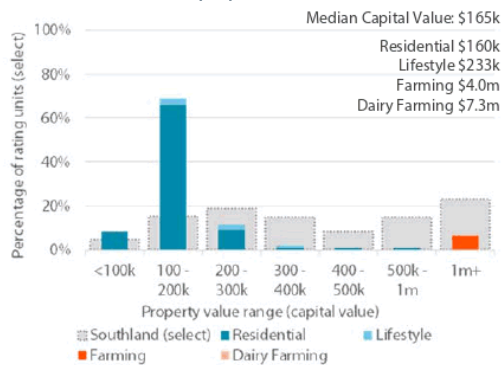
Distribution of household incomes



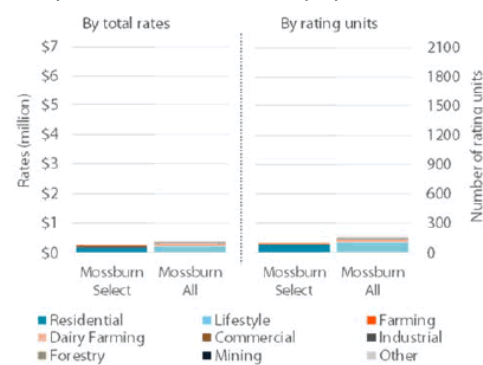
Distribution of rates by land use



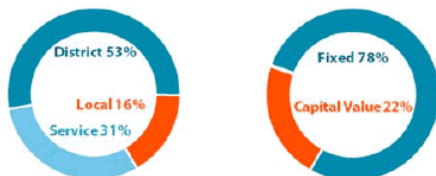
Distribution of property values by land use



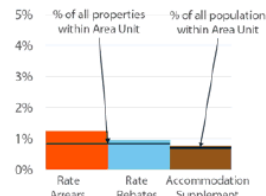
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



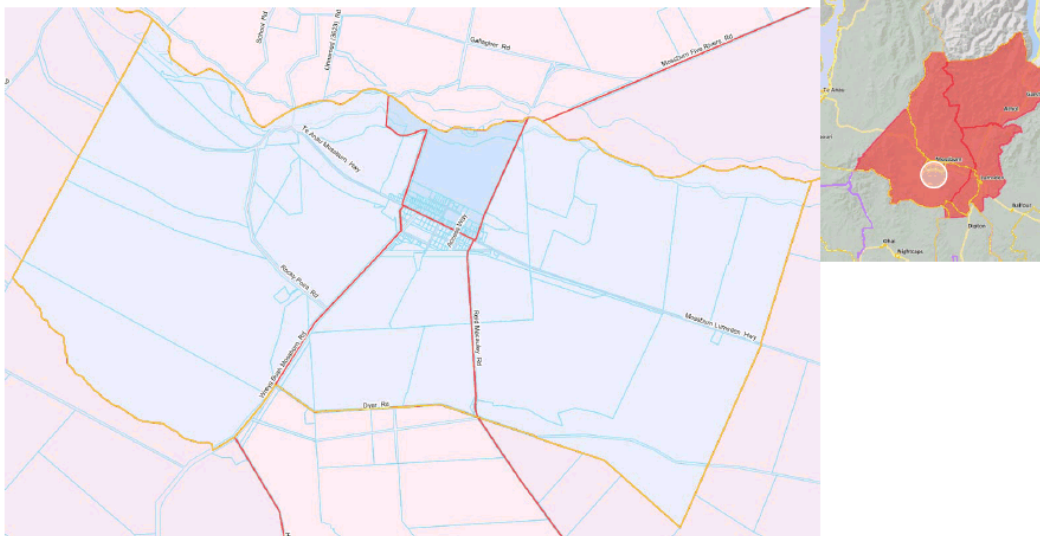
Share of rate arrears/rebates^{SDC} + accommodation supplement



Meshblock data – selected properties

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res. % LU Av CV
3170800	99	0.33%	42	0.37%	\$52,555	\$2,259	4.30%	53	0.42%	4	\$120,689				
3170900	72	0.24%	27	0.23%	\$67,271	\$2,262	3.36%	30	0.24%	1	\$69,218				
3170700	15	0.05%	9	0.08%	\$165,964	\$4,213	2.54%	8	0.06%	3	\$49,009				
3171000	15	0.05%	9	0.08%	\$119,826	\$2,123	1.77%	6	0.05%	2	\$28,296				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



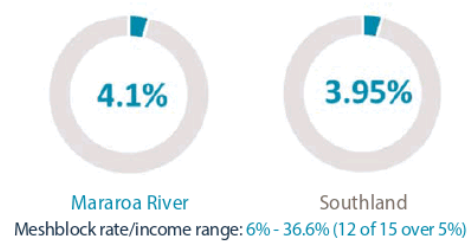
Mararoa River at a glance (rural area split over multiple Community Boards)

The Mararoa River area unit covers more than one community board (Fiordland and Northern) with the majority of the area unit contained within Fiordland. The area unit data below is for the entire area unit as 2013 Census income data is not currently available for each community board area. The meshblock data and map that follows shows only the meshblocks within area unit that fit within relevant board area.

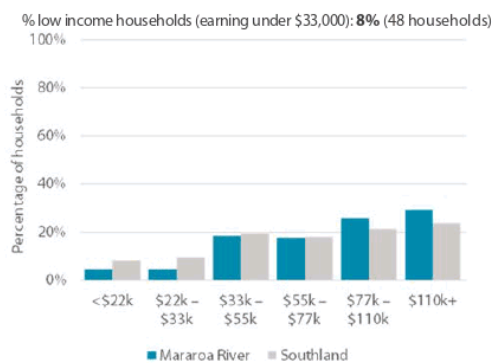
Mararoa River Area Unit data – selected properties

	Mararoa River		Southland	
Population	1,587		29,617	
Households	594		11,523	
Median Income	\$83,314		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$3,397	\$3,132	\$2,789	\$2,592
Rating Units	552	(987)	12,498	(20,328)
Total Rates	\$3.8m	(\$4.7m)	\$53.9m	(\$66.6m)

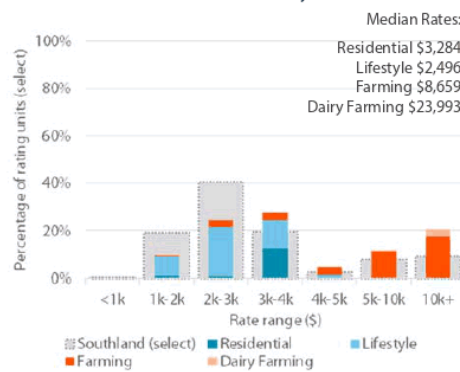
Rates as a proportion of income



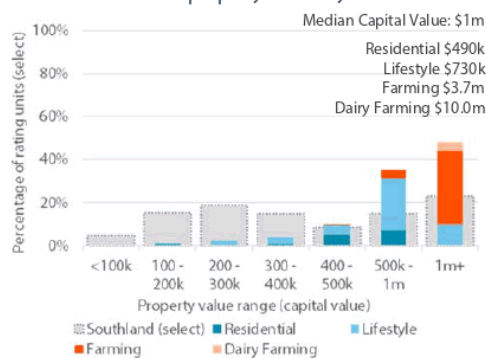
Distribution of household incomes



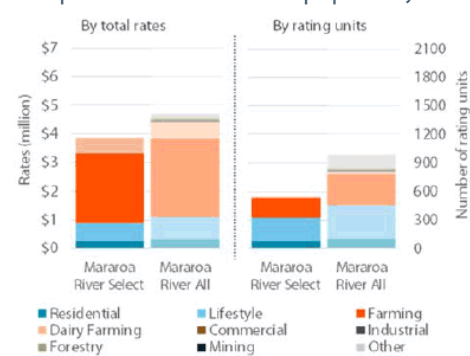
Distribution of rates by land use



Distribution of property values by land use



Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^{SDC} + accommodation supplement

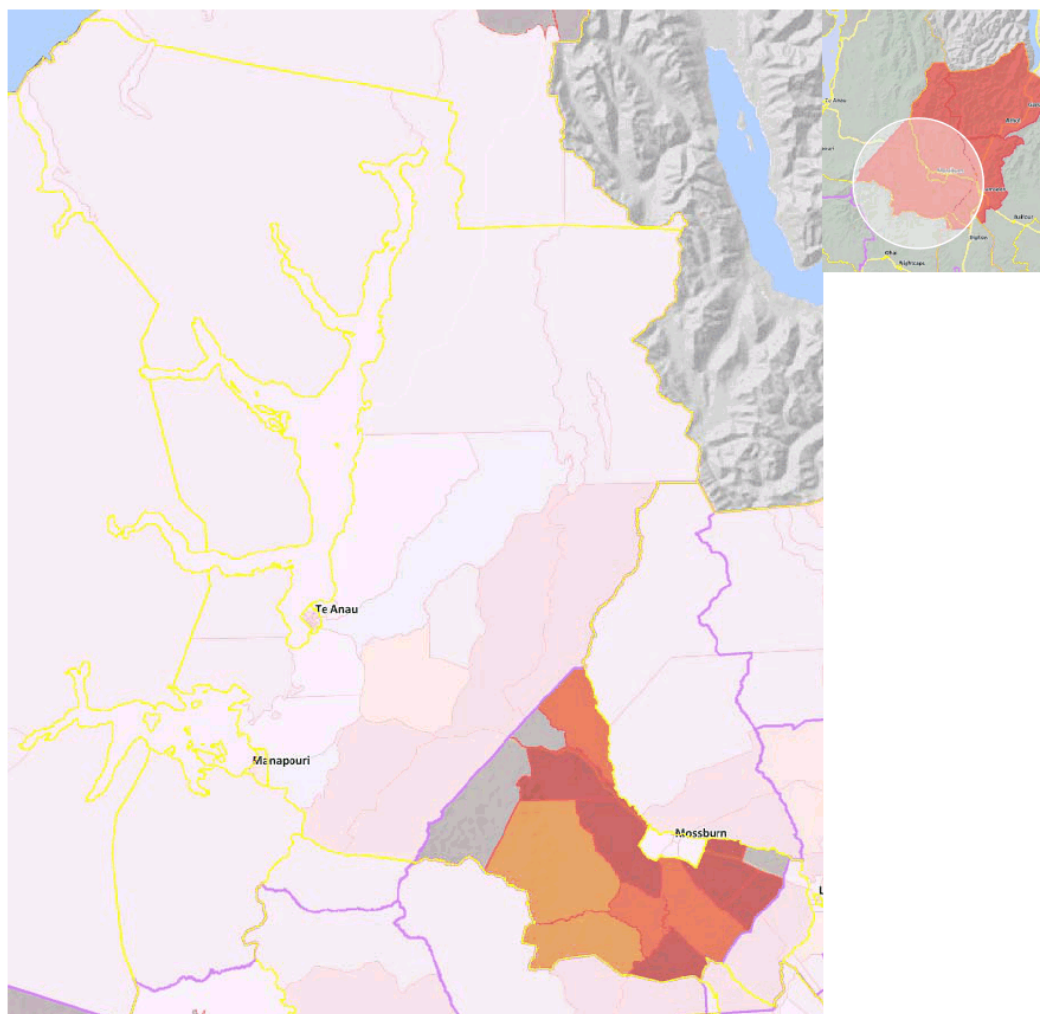


Meshblock data – selected properties

The meshblock data table and map below shows the information for the meshblocks contained within Mararoa River area unit within Northern Community Board area. To view the meshblock and map data for this area unit within Fiordland Community Board area refer to page 45.

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Re % LU Av CV
Within Northern Community Board area															
3171700	36	0.12%	12	0.10%	\$110,643	\$40,436	36.55%	2	0.02%	2	\$80,871	50% \$7.4m	50% \$31.9m		
3171500	27	0.09%	9	0.08%	\$94,046	\$24,928	26.51%	5	0.04%	5	\$105,094	60% \$7.8m	40% \$12.1m		
3170202	24	0.08%	9	0.08%	\$40,606	\$8,247	20.31%	6	0.05%	5	\$57,249	83% \$6.1m		17% \$275k	
3171600	48	0.16%	18	0.16%	\$63,619	\$12,873	20.23%	8	0.06%	8	\$127,107	75% \$4.6m	25% \$13.2m		
3171100	45	0.15%	15	0.13%	\$82,982	\$15,297	18.43%	8	0.06%	7	\$117,343	63% \$4.2m	37% \$10.4m		
3171203	21	0.07%	9	0.08%	\$60,853	\$10,984	18.05%	5	0.04%	5	\$56,273	100% \$5.4m			
3170400	54	0.18%	21	0.18%	\$57,202	\$9,158	16.01%	14	0.11%	12	\$170,398	64% \$4.6m	29% \$10.7m	7% \$285k	
3170101	18	0.06%	6	0.05%	\$94,046	\$11,079	11.78%	3	0.02%	3	\$58,865	100% \$11.3m			
3170500	60	0.20%	21	0.18%	\$94,046	\$11,067	11.77%	12	0.10%	9	\$160,557	66% \$5.9m	17% \$10.5m	17% \$388k	
3171201	51	0.17%	21	0.18%	\$80,216	\$7,894	9.84%	9	0.07%	8	\$103,060	78% \$5.8m	11% \$12.6m	11% \$550k	
3170600	39	0.13%	15	0.13%	\$80,216	\$5,138	6.41%	7	0.06%	4	\$70,849	72% \$2.7m	14% \$21.6m	14% \$230k	
3170300	30	0.10%	12	0.10%	\$115,290	\$6,921	6.00%	13	0.10%	9	\$110,009	77% \$5.4m	8% \$3.1m	15% \$325k	
3171300	9	0.03%	6	0.05%	...C	\$26,073	...C	2	0.02%	...C	\$52,146				
3171400	15	0.05%	3	0.03%	...C	\$4,395	...C	4	0.03%	...C	\$31,438				
3170102	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



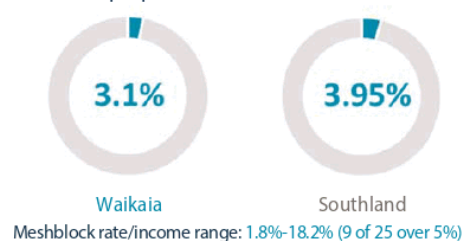
Waikaia at a glance (rural area split over multiple Community Boards)

The Waikaia area unit covers more than one community board (Ardlussa and Northern) with the majority of the area unit contained within Ardlussa. The area unit data below is for the entire area unit as 2013 Census income data is not currently available for each community board area. The meshblock data and map that follows shows only the meshblocks within area unit that fit within relevant board area.

Waikaia Area Unit data – selected properties

	Waikaia		Southland	
Population	1,656		29,617	
Households	642		11,523	
Median Income	\$74,352		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,340	\$1,825	\$2,789	\$2,592
Rating Units	663	(1,190)	12,498	(20,328)
Total Rates	\$4.5m	(\$5.4m)	\$53.9m	(\$66.6m)

Rates as a proportion of income

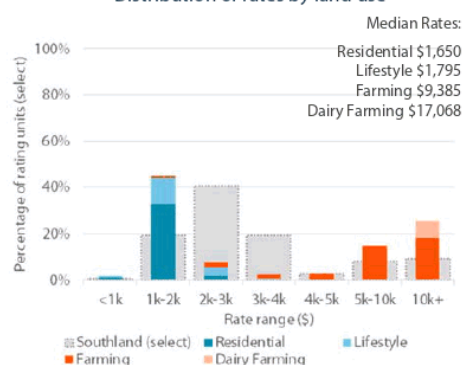


Distribution of household incomes

% low income households (earning under \$33,000): 13% (81 households)



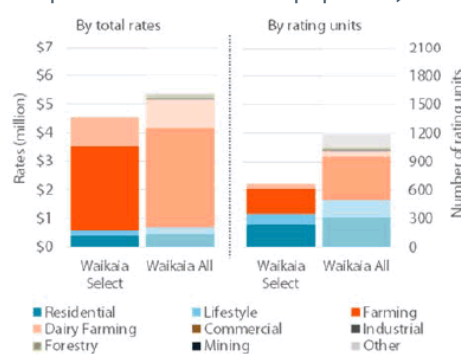
Distribution of rates by land use



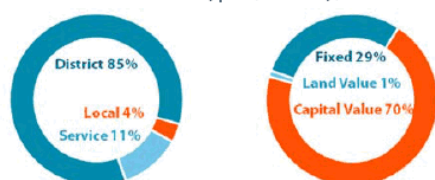
Distribution of property values by land use



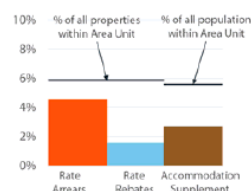
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^{SDC} + accommodation supplement



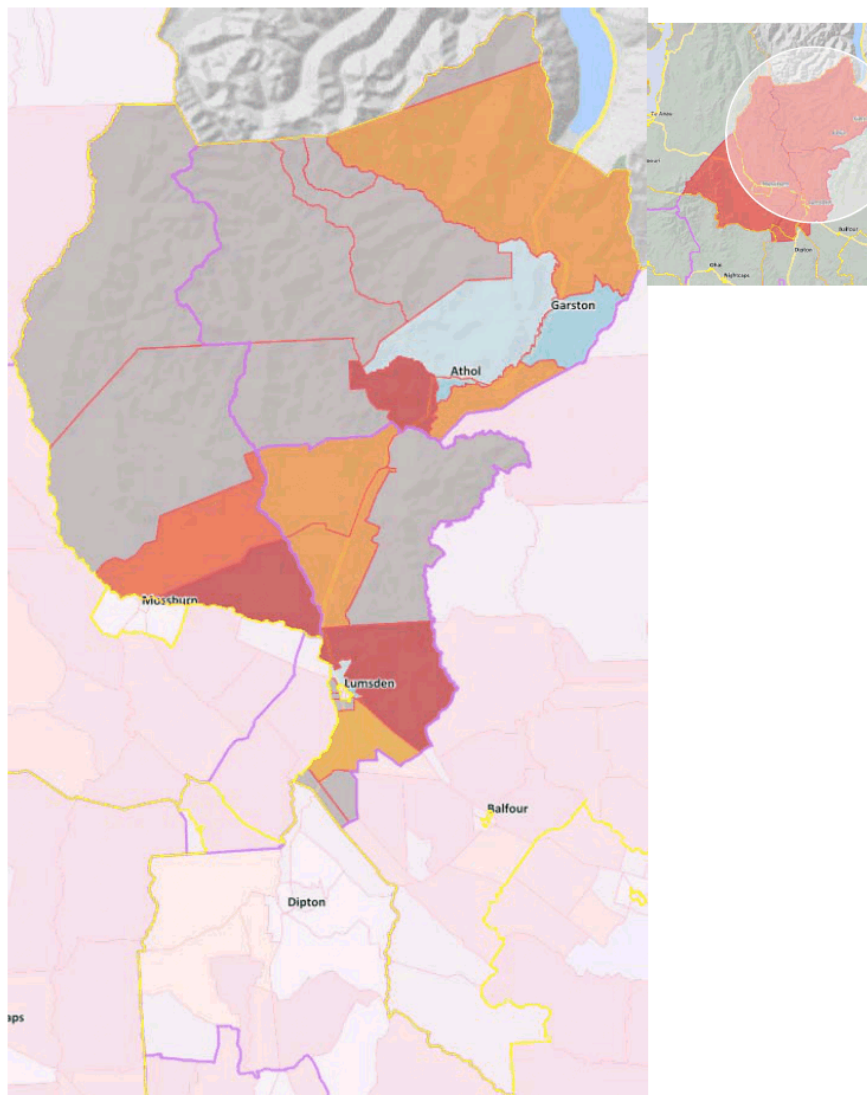
Meshblock data – selected properties

The meshblock data table and map below shows the information for the meshblocks contained within Waikaia area unit within Northern Community Board area. To view the meshblock and map data for this area unit within Ardlussa Community Board area refer to page 33.

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
Within Northern Community Board area															
3041700	48	0.16%	18	0.16%	\$63,619	\$11,548	18.15%	13	0.10%	9	\$159,592	54% \$6.9m	15% \$12.3m	31% \$432k	
3044601	54	0.18%	18	0.16%	\$77,450	\$12,519	16.16%	13	0.10%	11	\$177,502	76% \$5.1m	8% \$9.9m	8% \$650k	8% \$120k
3041400	15	0.05%	6	0.05%	\$60,853	\$9,121	14.99%	7	0.06%	5	\$75,110	71% \$5.1m		29% \$288k	
3041600	81	0.27%	30	0.26%	\$85,748	\$8,120	9.47%	20	0.16%	14	\$186,069	60% \$5.8m	20% \$5.8m	15% \$408k	5% \$230k
3041800	54	0.18%	24	0.21%	\$124,473	\$9,207	7.40%	16	0.13%	11	\$165,311	63% \$7m	6% \$12.5m	31% \$260k	
3041500	51	0.17%	21	0.18%	\$119,826	\$8,850	7.39%	17	0.14%	12	\$173,403	58% \$5.6m	18% \$19.3m	24% \$606k	
3040900	24	0.08%	6	0.05%	\$77,450	\$5,164	6.67%	7	0.06%	4	\$45,222	57% \$5.3m		43% \$350k	
3040602	36	0.12%	15	0.13%	\$94,046	\$5,781	6.15%	10	0.08%	5	\$87,214	80% \$5.5m		20% \$480k	
3044801	57	0.19%	21	0.18%	\$85,748	\$4,962	5.79%	16	0.13%	9	\$144,954	44% \$2.4m	31% \$5.5m	25% \$500k	
3040800	51	0.17%	18	0.16%	\$43,372	\$1,881	4.34%	26	0.21%	9	\$90,373				
3041300	51	0.17%	21	0.18%	\$41,491	\$1,733	4.18%	52	0.42%	4	\$96,960				
3044000	42	0.14%	15	0.13%	\$70,037	\$2,452	3.50%	16	0.13%	0	\$40,009				
3043600	21	0.07%	6	0.05%	\$119,826	\$2,461	2.05%	4	0.03%	1	\$15,231				
3041200	36	0.12%	15	0.13%	\$94,046	\$1,731	1.84%	13	0.10%	5	\$98,822				
3041101	12	0.04%	3	0.03%	...C	\$12,955	...C	4	0.03%	...C	\$52,279				
3045001	12	0.04%	3	0.03%	...C	\$21,198	...C	2	0.02%	...C	\$42,397				
3043900	9	0.03%	3	0.03%	...C	\$2,456	...C	6	0.05%	...C	\$19,461				
3041003	3	0.01%	3	0.03%	...C	\$16,526	...C	1	0.01%	...C	\$16,526				
3046001	6	0.02%	3	0.03%	...C	\$4,828	...C	2	0.02%	...C	\$9,657				
3043700	6	0.02%	0	0.00%	...C	\$2,274	...C	2	0.02%	...C	\$4,547				
3043800	0	0.00%	0	0.00%	...C	\$1,996	...C	1	0.01%	...C	\$1,996				
3041901	3	0.01%	0	0.00%	...C	\$1,953	...C	1	0.01%	...C	\$1,953				
3040402	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				
3041002	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				
3041102	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				

Assessing Southland rates affordability

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



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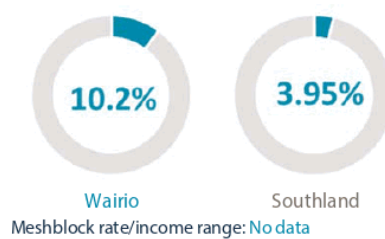
Wairio at a glance (rural area split over multiple Community Boards)

The Wairio area unit covers more than one community board (Wallace Takitimu, Tuatapere Te Waewae, Fiordland and Northern) with the majority of the area unit contained within Wallace Takitimu. The area unit data below is for the entire area unit as 2013 Census income data is not currently available for each community board area. The meshblock data and map that follows shows only the meshblocks within area unit that fit within relevant board area.

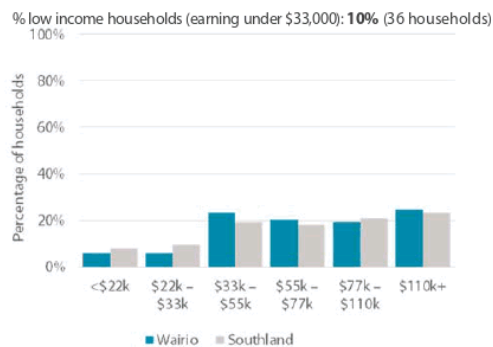
Wairio Area Unit data – selected properties

	Wairio		Southland	
Population	942		29,617	
Households	354		11,523	
Median Income	\$71,364		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$7,275	\$3,186	\$2,789	\$2,592
Rating Units	243	(460)	12,498	(20,328)
Total Rates	\$2.3m	(\$2.8m)	\$53.9m	(\$66.6m)

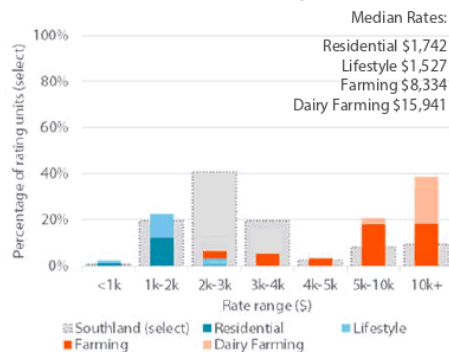
Rates as a proportion of income



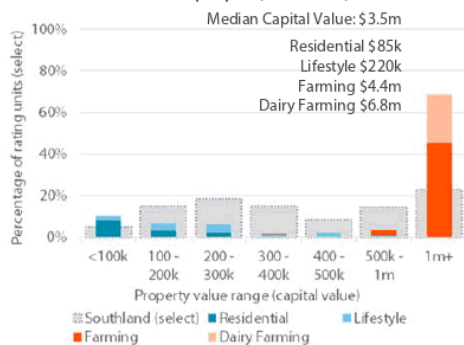
Distribution of household incomes



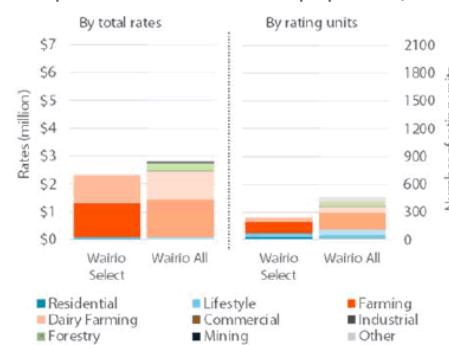
Distribution of rates by land use



Distribution of property values by land use



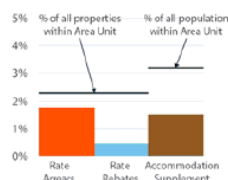
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^(SDC) + accommodation supplement

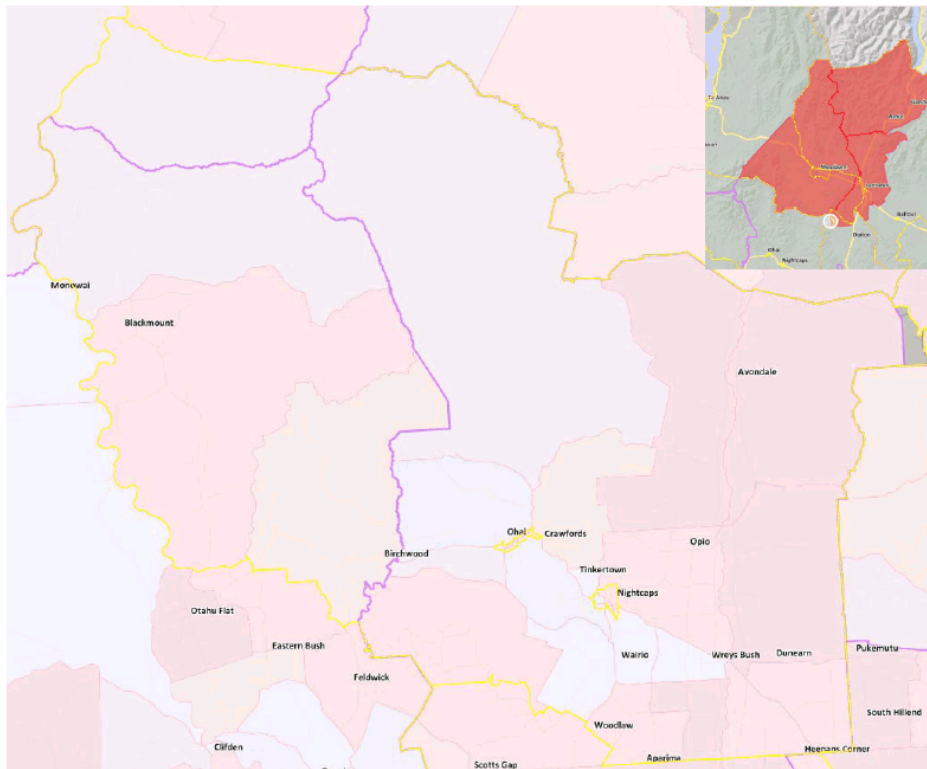


Meshblock data – selected properties

The meshblock data table and the map below shows the information for the meshblocks contained within Waio area unit within Northern Community Board area. To view the meshblock and map data for this area unit within other board areas refer to the relevant community board section (Wallace Takitimu on page 148, Tuatapere Te Waewae on page 116 and Fiordland on page 52).

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
Within Northern Community Board area															
3171205	6	0.02%	3	0.03%	...C	\$14,305	...C	1	0.01%	...C	\$14,305				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



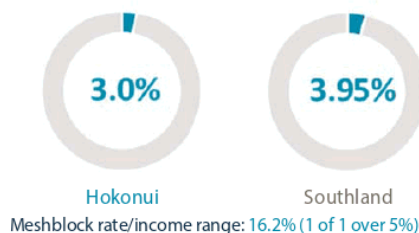
Hokonui at a glance (rural area split over multiple Community Boards)

The Hokonui area unit covers more than one community board (Oreti and Northern) with the majority of the area unit contained within Oreti. The area unit data below is for the entire area unit as 2013 Census income data is not currently available for each community board area. The meshblock data and map that follows shows only the meshblocks within area unit that fit within relevant board area.

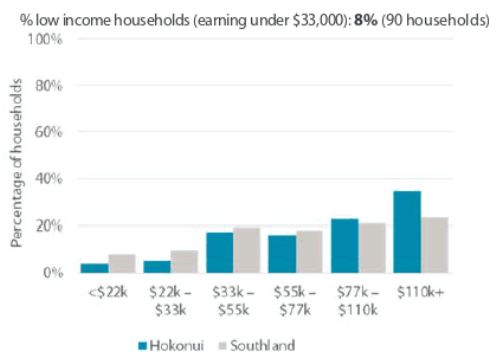
Hokonui Unit data – selected properties

	Hokonui		Southland	
Population	3,087		29,617	
Households	1,089		11,523	
Median Income	\$87,850		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,615	\$2,147	\$2,789	\$2,592
Rating Units	939	(1,651)	12,498	(20,328)
Total Rates	\$5.3m	(\$6.5m)	\$53.9m	(\$66.6m)

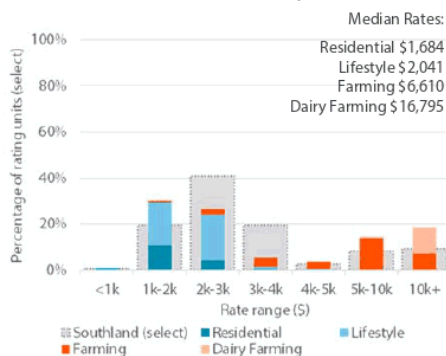
Rates as a proportion of income



Distribution of household incomes



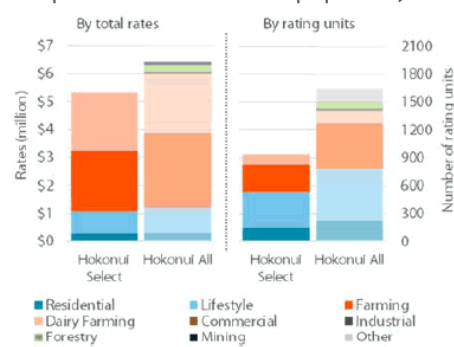
Distribution of rates by land use



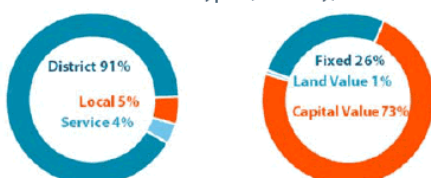
Distribution of property values by land use



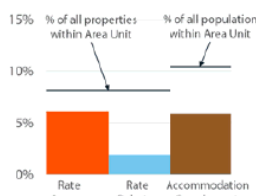
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^{SDQ} + accommodation supplement

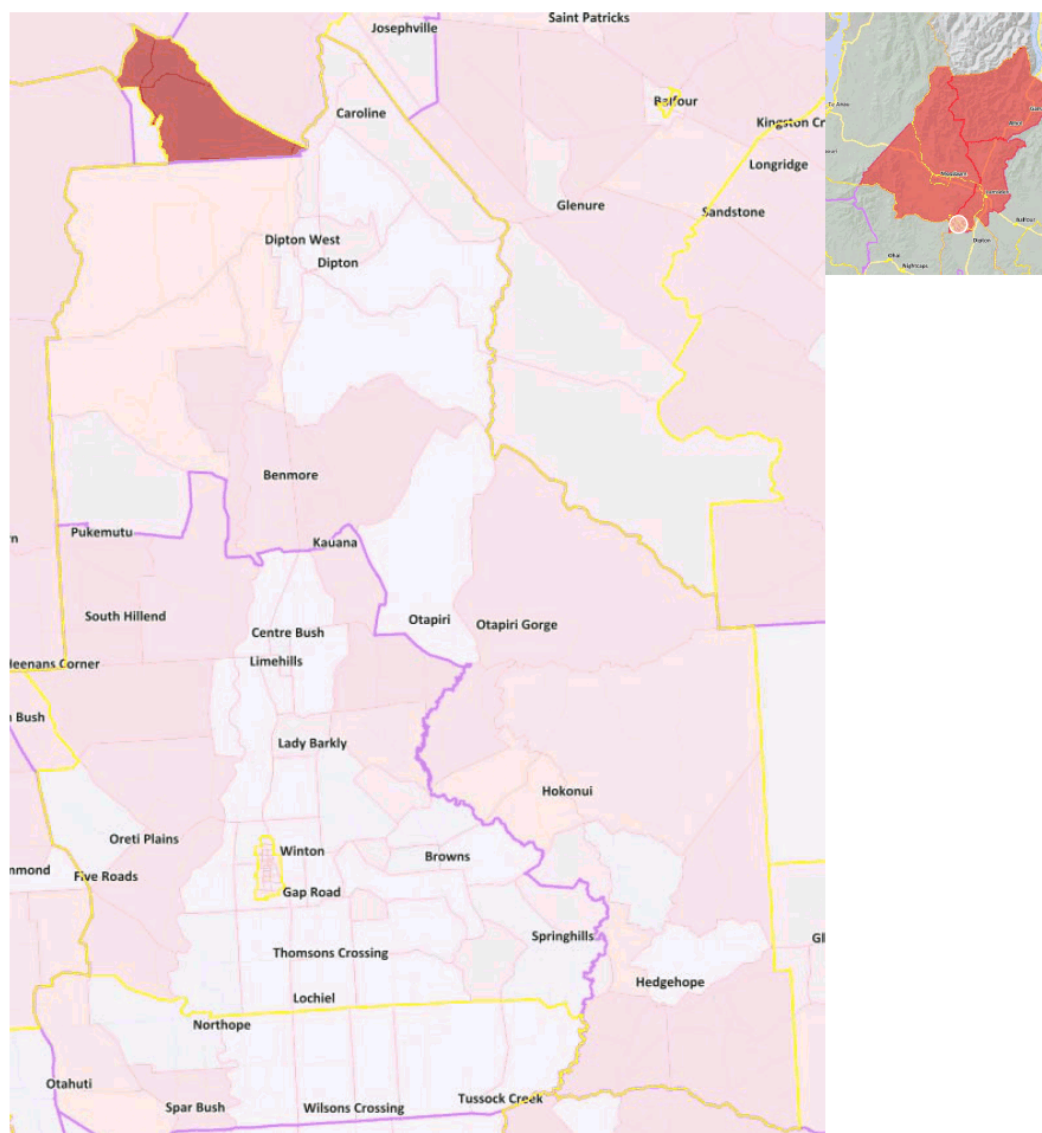


Meshblock data – selected properties

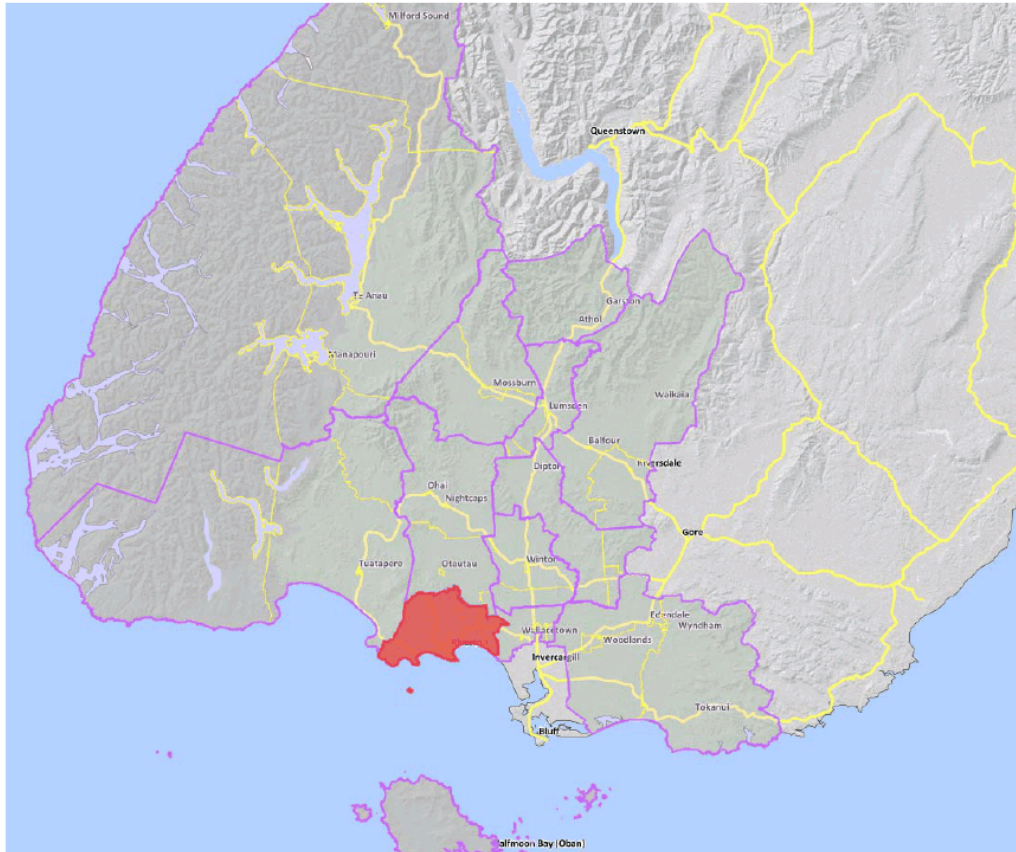
The meshblock data table and the map below shows the information for the meshblocks contained within Hokonui area unit within Northern Community Board area. To view the meshblock and map data for this area unit within Oreti Community Board area refer to page 92.

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)							
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	Life % LU Av CV	Res % LU Av CV
Within Northern Community Board area															
3171204	30	0.10%	9	0.08%	\$77,450	\$12,513	16.16%	7	0.06%	5	\$72,624	57% \$7.6m	14% \$6.4m	29% \$313k	

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



Oraka Aparima Community Board



The Oraka Aparima Community Board area contains seven area units and 52 meshblocks. The area units that are either wholly or partly within community board area include:

- Riverton East (whole) – the township urban area
- Riverton West (whole) – the township urban area
- Te Waewae (part) – the rural area in the western part of the board area including Colac Bay township
- Fairfax (part) – the rural area in the centre part of the board area including the Thornbury township
- Waianiwa (part) – a small part of the rural area in the eastern part of the board area
- Centre Island – the island off the coast (contains no income data)
- Inlet-Jacobs River Estuary – the estuary area in Riverton (contains no income data)

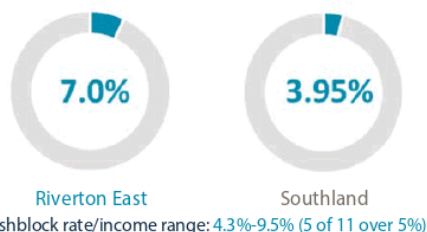
Riverton East at a glance (urban area)

The Riverton East area unit is fully contained within the Oraka Apanima Community Board.

Riverton East Area Unit data – selected properties

	Riverton East		Southland	
Population	435		29,617	
Households	192		11,523	
Median Income	\$38,946		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,731	\$2,655	\$2,789	\$2,592
Rating Units	204	(423)	12,498	(20,328)
Total Rates	(\$0.6m)	(\$0.9m)	\$53.9m	(\$66.6m)

Rates as a proportion of income

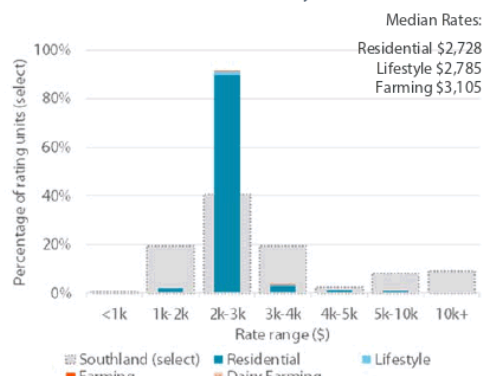


Distribution of household incomes

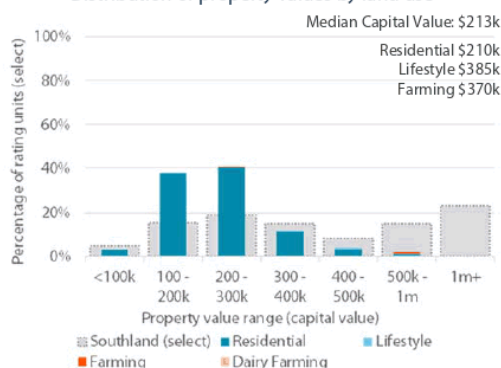
% low income households (earning under \$33,000): 34% (66 households)



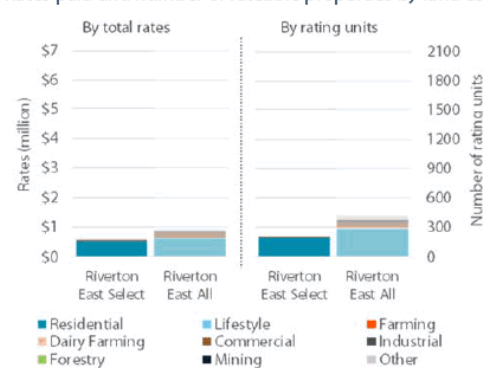
Distribution of rates by land use



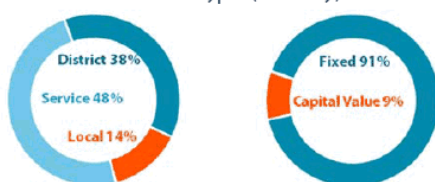
Distribution of property values by land use



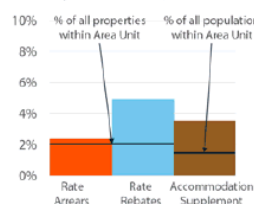
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



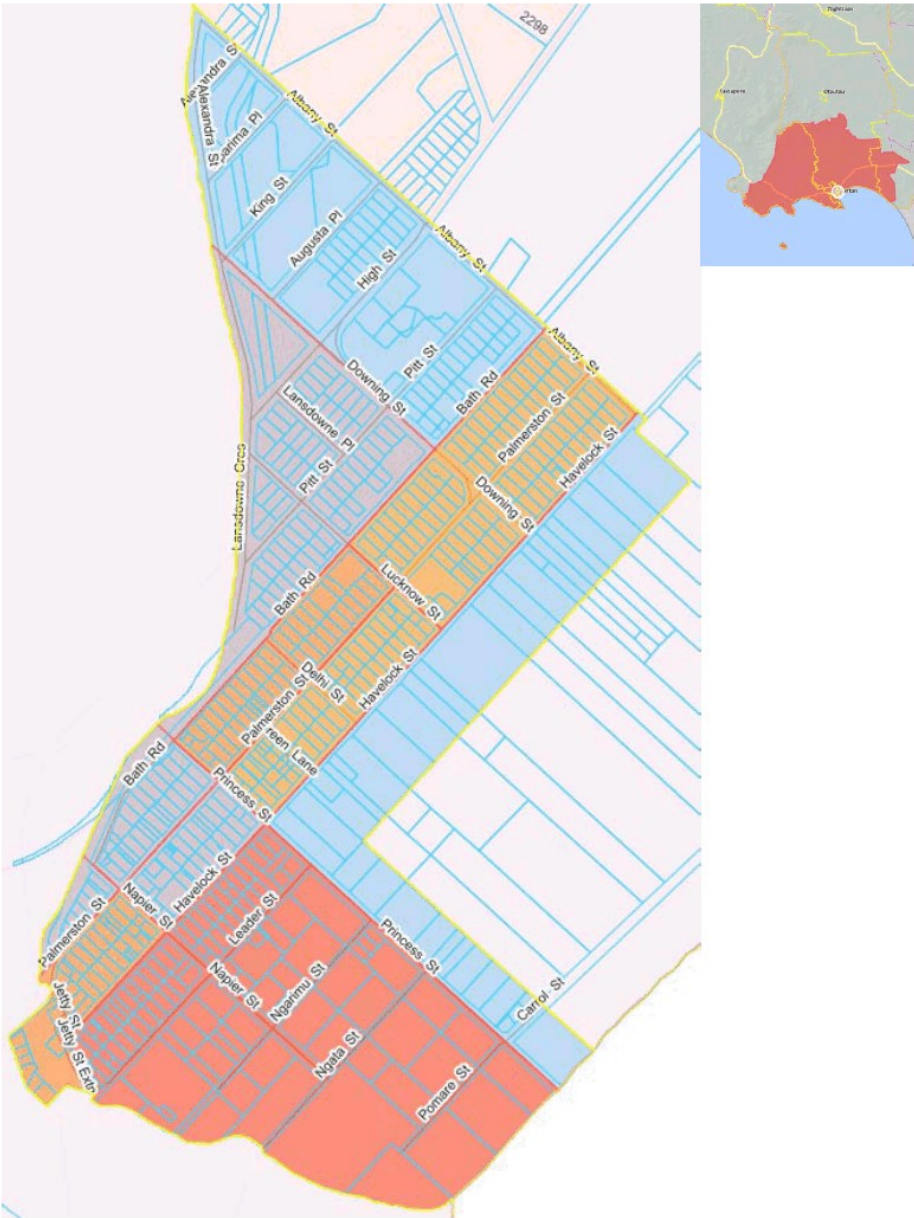
Share of rate arrears/rebates^{SDC} + accommodation supplement



Meshblock data – selected properties

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
3191300	138		72		\$28,546	\$2,717	9.52%	66	0.53%	63	\$185,409	2% \$530k		3% \$339k	95% \$208k
3191100	15		6		\$36,844	\$2,764	7.50%	9	0.07%	9	\$25,039				100% \$249k
3190600	15		9		\$35,959	\$2,669	7.42%	16	0.13%	16	\$43,463				100% \$198k
3190700	66		36		\$49,789	\$2,764	5.55%	39	0.31%	39	\$109,691				100% \$246k
3190500	72		36		\$49,789	\$2,728	5.48%	38	0.30%	38	\$104,045	3% \$210k	% \$m	% \$k	97% \$311k
3190300	75		6		\$60,853	\$2,776	4.56%	9	0.07%	2	\$25,566				
3191200	12		9		\$54,436	\$2,316	4.25%	11	0.09%	5	\$28,882				
3190900	12		6		...C	\$2,697	...C	10	0.08%	...C	\$26,967				
3190400	12		3		...C	\$2,706	...C	4	0.03%	...C	\$10,703				
3190800	15		3		...C	\$2,143	...C	2	0.02%	...C	\$4,287				
3191000	3		0		...C	N/A	...C	0	0.00%	N/A	\$0				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



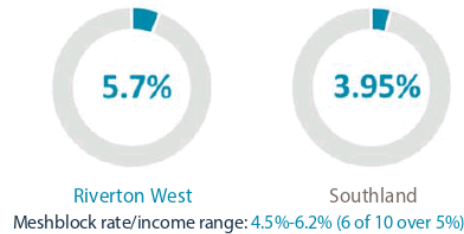
Riverton West at a glance (urban area)

The Riverton West area unit is fully contained within the Oraka Aparima Community Board.

Riverton West Area Unit data – selected properties

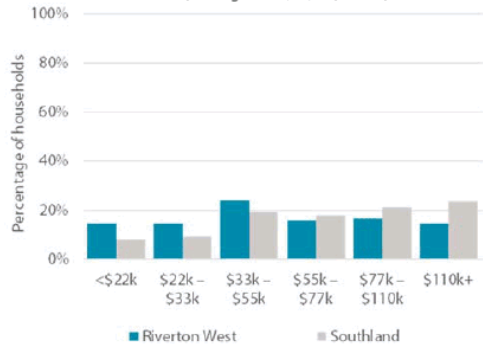
	Riverton West		Southland	
Population	999		29,617	
Households	459		11,523	
Median Income	\$51,559		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,959	\$2,907	\$2,789	\$2,592
Rating Units	823	(1026)	12,498	(20,328)
Total Rates	\$2.5m	(\$2.7m)	\$53.9m	(\$66.6m)

Rates as a proportion of income



Distribution of household incomes

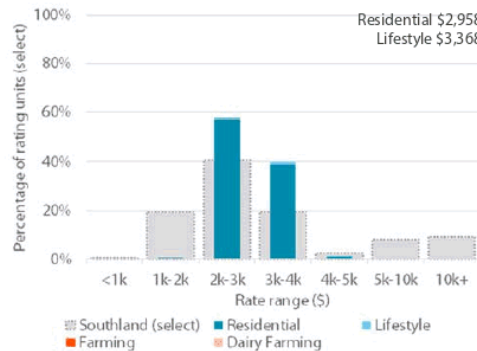
% low income households (earning under \$33,000): **26%** (120 households)



Distribution of rates by land use

Median Rates:

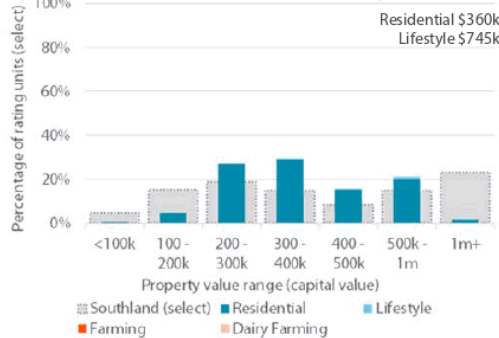
Residential \$2,958
Lifestyle \$3,368



Distribution of property values by land use

Median Capital Value: \$360k

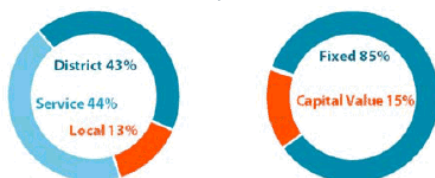
Residential \$360k
Lifestyle \$745k



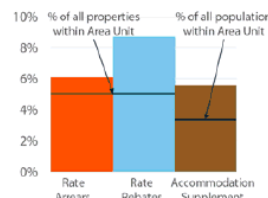
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



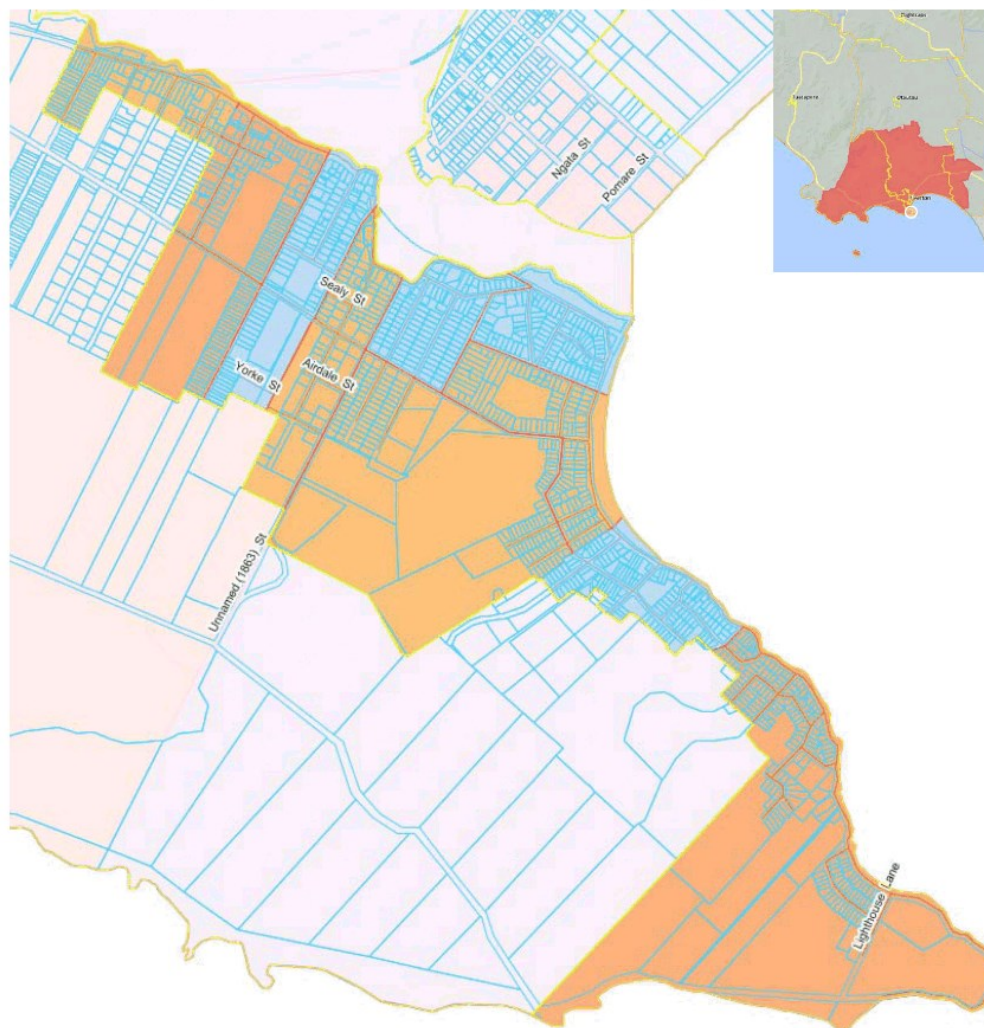
Share of rate arrears/rebates^{SDC} + accommodation supplement



Meshblock data – selected properties

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
3189700	111	0.38%	45	0.39%	\$47,023	\$2,911	6.19%	54	0.43%	53	\$154,879			7% \$745k	93% \$339k
3187904	99	0.33%	54	0.47%	\$49,789	\$3,020	6.07%	172	1.38%	169	\$534,932			2% 8605k	98% \$456k
3189900	78	0.26%	27	0.23%	\$49,789	\$2,940	5.90%	37	0.30%	36	\$109,506			5% \$595k	95% \$371k
3187802	81	0.27%	36	0.31%	\$49,789	\$2,914	5.85%	42	0.34%	41	\$122,777				100% \$346k
3190202	96	0.32%	48	0.42%	\$49,789	\$2,888	5.80%	106	0.85%	103	\$309,331				100% \$337k
3190201	78	0.26%	39	0.34%	\$57,202	\$2,867	5.01%	69	0.55%	36	\$198,499			6% \$843k	94% \$290k
3189800	114	0.39%	51	0.44%	\$60,853	\$2,981	4.90%	61	0.49%	24	\$181,548				
3190000	156	0.53%	66	0.57%	\$60,853	\$2,888	4.75%	87	0.70%	29	\$257,678				
3187903	81	0.27%	39	0.34%	\$68,266	\$3,073	4.50%	115	0.92%	19	\$364,621				
3190100	105	0.35%	54	0.47%	\$67,271	\$3,020	4.49%	80	0.64%	9	\$247,452				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



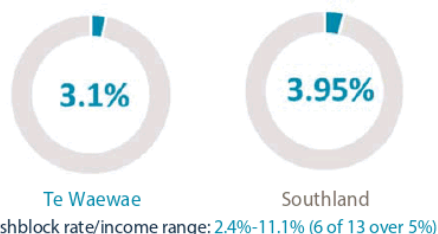
Te Waewae at a glance (rural area split over multiple Community Boards)

The Te Waewae area unit covers more than one community board (Tuatapere Te Waewae, Oraka Aparima and Fiordland) with the majority of the area unit contained within Tuatapere Te Waewae. The area unit data below is for the entire area unit as 2013 Census income data is not currently available for each community board area. The meshblock data and map that follows shows only the meshblocks within area unit that fit within relevant board area.

Te Waewae Area Unit data – selected properties

	Te Waewae		Southland	
Population	1,380		29,617	
Households	534		11,523	
Median Income	\$65,168		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,043	\$1,608	\$2,789	\$2,592
Rating Units	604	(1,419)	12,498	(20,328)
Total Rates	\$2.6m	(\$3.5m)	\$53.9m	(\$66.6m)

Rates as a proportion of income

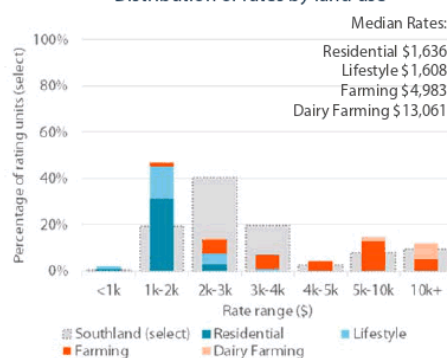


Distribution of household incomes

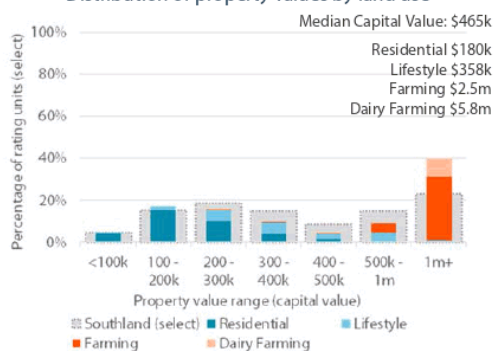
% low income households (earning under \$33,000): **20%** (105 households)



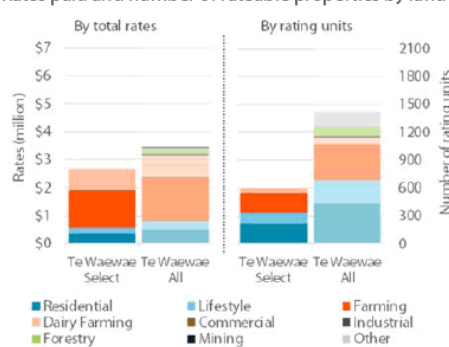
Distribution of rates by land use



Distribution of property values by land use



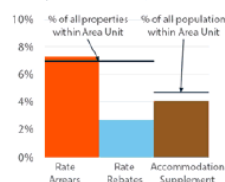
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^(SDC) + accommodation supplement

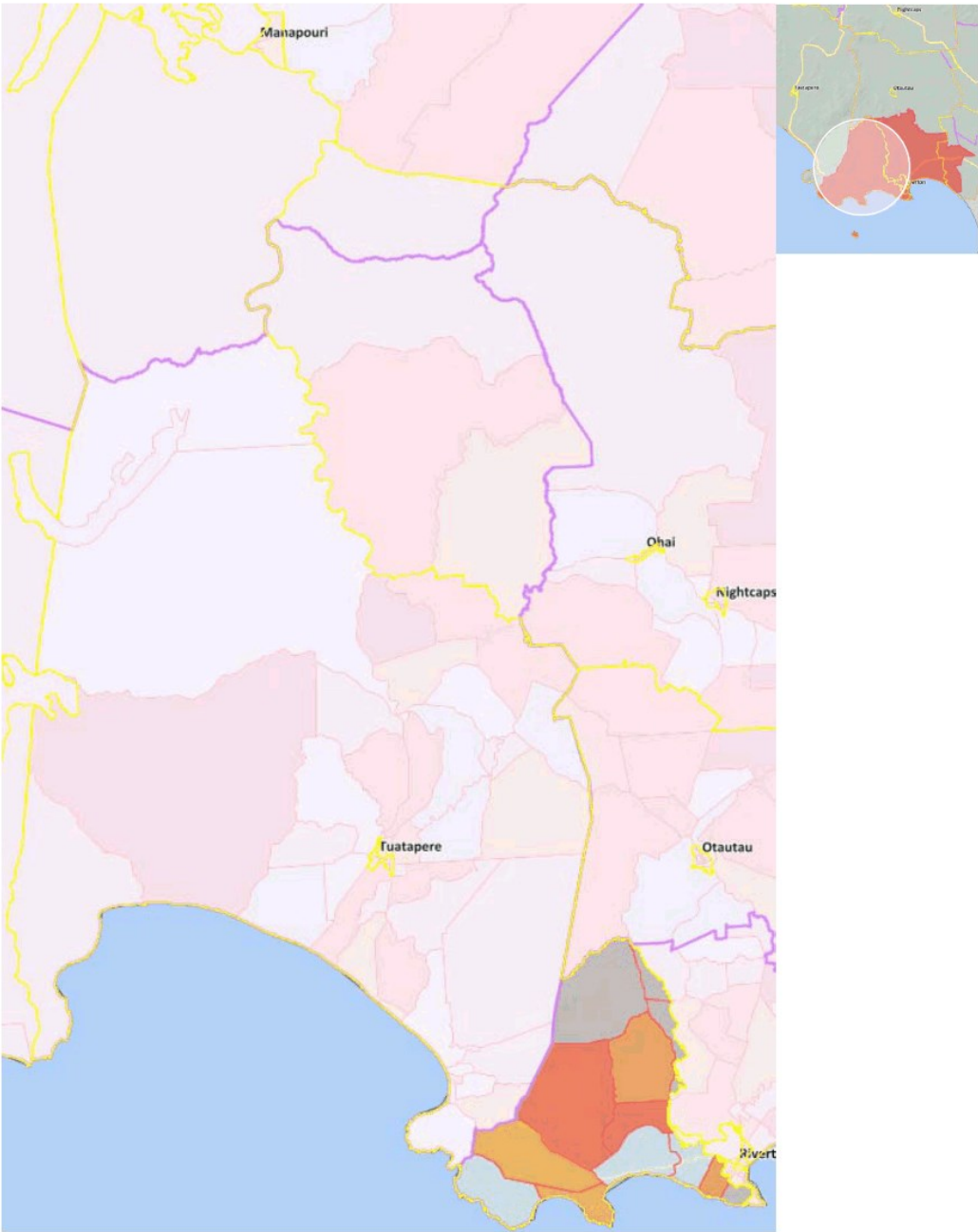


Meshblock data – selected properties

The meshblock data table and map below shows the information for the meshblocks contained within Te Waewae area unit within Oraka Aparima Community Board area. To view the meshblock and map data for this area unit within other board areas refer to the relevant community board section (Tuatapere Te Waewae on page 77 and Fiordland on page 50).

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
Within Oraka Aparima Community Board area															
3187300	30	0.10%	12	0.10%	\$19,362	\$2,153	11.12%	12	0.10%	12	\$28,710	67% \$1.1m		33% \$344k	
3187500	18	0.06%	6	0.05%	\$94,046	\$10,201	10.85%	3	0.02%	3	\$31,292	33% \$2.7m	67% \$6m		
3187801	24	0.08%	12	0.10%	\$39,610	\$2,564	6.47%	14	0.11%	13	\$45,333	7% \$1.6m	7% \$4.5m	64% \$515k	22% \$208k
3187400	27	0.09%	9	0.08%	\$71,918	\$4,324	6.01%	6	0.05%	4	\$29,108	100% \$2.5m			
3188000	60	0.20%	33	0.29%	\$30,427	\$1,698	5.58%	73	0.58%	68	\$134,677	3% \$3.2m		8% \$503k	89% \$267k
3188100	48	0.16%	18	0.16%	\$68,266	\$3,452	5.06%	19	0.15%	10	\$87,092	63% \$2.5m	11% \$4.6m	15% \$257k	11% \$215k
3188200	24	0.08%	9	0.08%	\$62,734	\$2,082	3.32%	13	0.10%	5	\$58,539				
3187700	36	0.12%	15	0.13%	\$60,853	\$1,697	2.79%	21	0.17%	2	\$40,224				
3187600	78	0.26%	27	0.23%	\$71,918	\$1,740	2.42%	45	0.36%	7	\$129,114				
3187200	3	0.01%	3	0.03%	...C	\$6,599	...C	3	0.02%	...C	\$29,282				
3187902	12	0.04%	3	0.03%	...C	\$3,486	...C	7	0.06%	...C	\$24,235				
3187000	15	0.05%	6	0.05%	...C	\$7,470	...C	3	0.02%	...C	\$24,201				
3187100	6	0.02%	3	0.03%	...C	\$4,972	...C	1	0.01%	...C	\$4,972				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



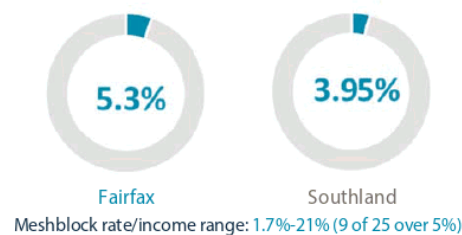
Fairfax at a glance (rural area split over multiple Community Boards)

The Fairfax area unit covers more than one community board (Wallace Takitimu, Oraka Aparima and Oreti) with the majority of the area unit contained within Wallace Takitimu. The area unit data below is for the entire area unit as 2013 Census income data is not currently available for each community board area. The meshblock data and map that follows shows only the meshblocks within area unit that fit within relevant board area.

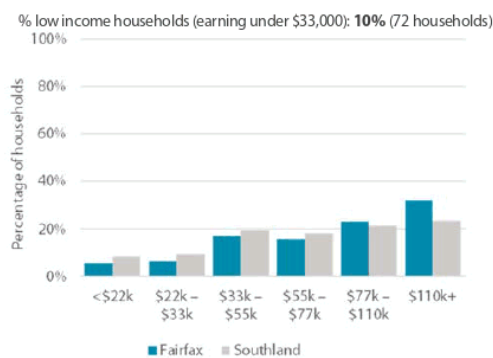
Fairfax Area Unit data – selected properties

	Fairfax		Southland	
Population	1,908		29,617	
Households	693		11,523	
Median Income	\$84,863		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$4,499	\$2,455	\$2,789	\$2,592
Rating Units	510	(834)	12,498	(20,328)
Total Rates	\$3.8m	(\$4.1m)	\$53.9m	(\$66.6m)

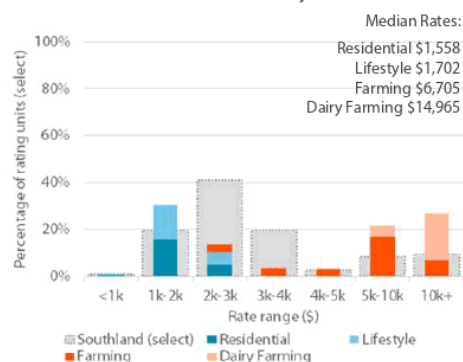
Rates as a proportion of income



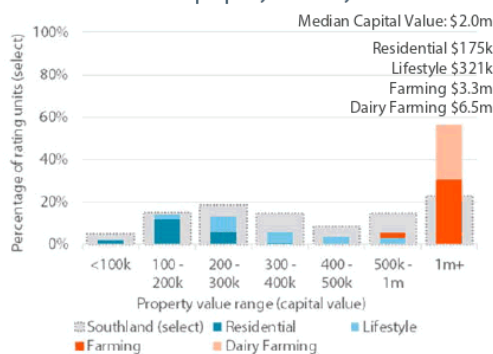
Distribution of household incomes



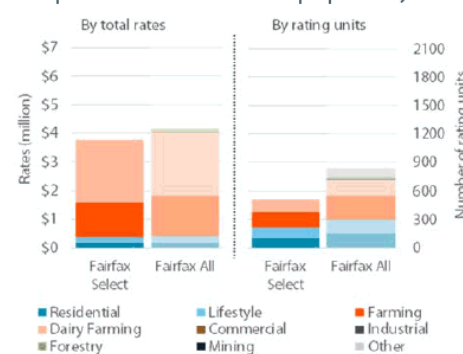
Distribution of rates by land use



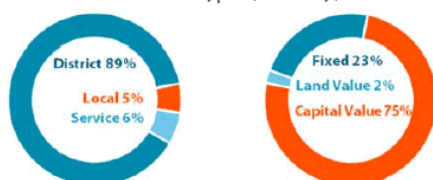
Distribution of property values by land use



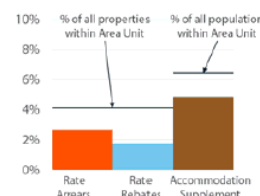
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^(SDC) + accommodation supplement

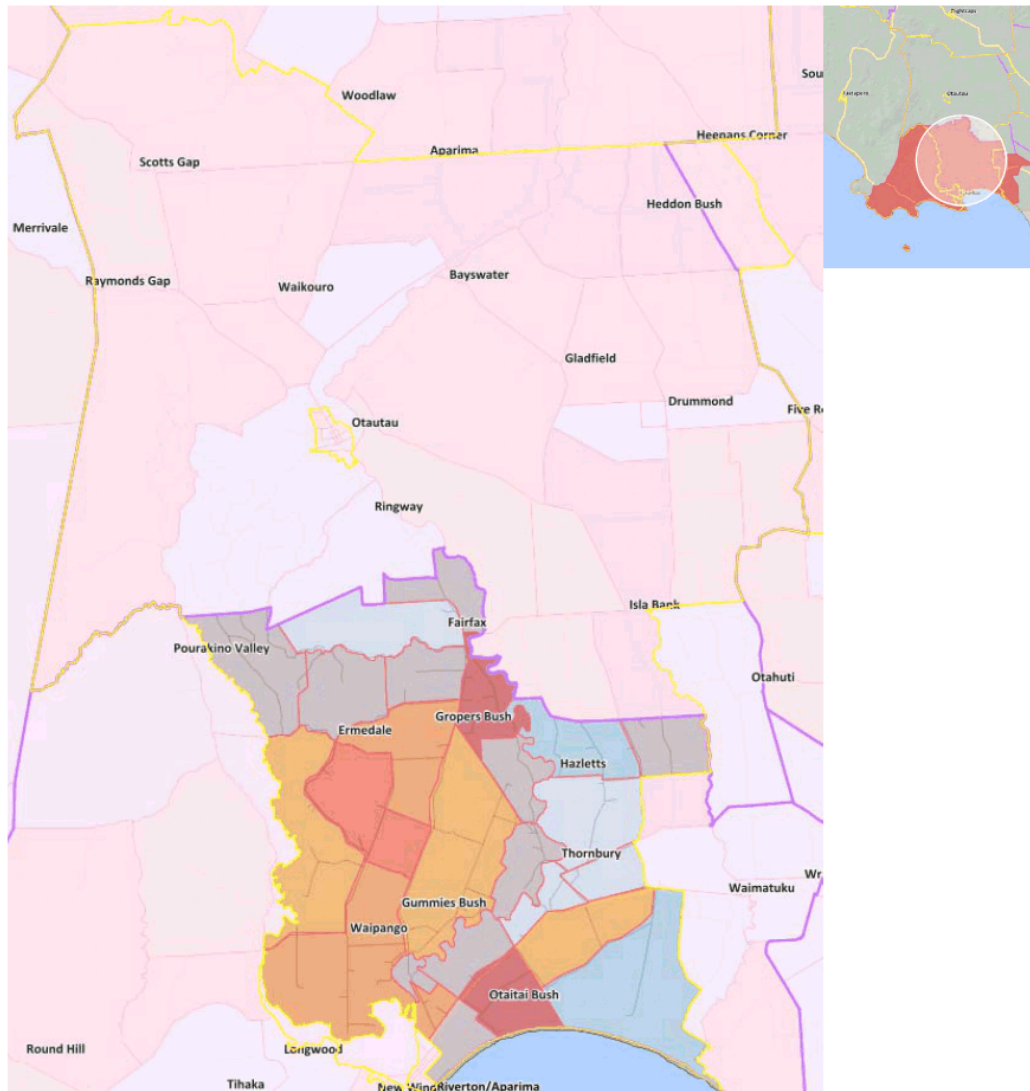


Meshblock data – selected properties

The meshblock data table and map below shows the information for the meshblocks contained within Fairfax area unit within Oraka Aparima Community Board area. To view the meshblock and map data for this area unit within other board areas refer to the relevant community board section (Wallace Takitimu on page 145 and Oreti on page 101).

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
Within Oraka Aparima Community Board area															
3186301	15	0.05%	6	0.05%	\$35,959	\$7,534	20.95%	5	0.04%	3	\$51,129	20% \$4.3m	40% \$8.6m	40% \$252k	
3185800	24	0.08%	9	0.08%	\$60,853	\$8,559	14.07%	6	0.05%	4	\$50,540	17% \$4.8m	50% \$5.5m	33% \$300k	
3186500	45	0.15%	12	0.10%	\$77,450	\$9,215	11.90%	9	0.07%	7	\$95,758	44% \$4.5m	44% \$6.9m		12% \$335k
3186400	24	0.08%	12	0.10%	\$94,046	\$6,300	6.70%	6	0.05%	4	\$36,381	50% \$3.3m	17% \$6.5m		33% \$228k
3186701	75	0.25%	30	0.26%	\$79,331	\$4,836	6.10%	16	0.13%	8	\$131,121	31% \$2.9m	31% \$9m	13%	25% \$157k
3185703	36	0.12%	18	0.16%	\$35,959	\$2,160	6.01%	9	0.07%	9	\$21,446	11% \$680k	11% \$1m	56%	22% \$395k
3186800	75	0.25%	27	0.23%	\$94,046	\$5,612	5.97%	13	0.10%	7	\$137,379	15% \$4.6m	46% \$8.2m	31%	8% \$200k
3185400	27	0.09%	6	0.05%	\$94,046	\$5,083	5.40%	7	0.06%	4	\$57,026	57% \$3.4m	14% \$11.4m		29% \$198k
3186600	36	0.12%	12	0.10%	\$124,473	\$6,374	5.12%	8	0.06%	4	\$65,186	63% \$3.9m	25% \$6.8m	13%	20% \$312k
3185500	24	0.08%	9	0.08%	\$138,303	\$6,445	4.66%	11	0.09%	5	\$77,354				
3184602	21	0.07%	6	0.05%	\$46,138	\$1,851	4.01%	7	0.06%	3	\$26,535				
3185100	75	0.25%	27	0.23%	\$46,138	\$1,606	3.48%	25	0.20%	0	\$40,614				
3186100	18	0.06%	6	0.05%	\$51,670	\$1,345	2.60%	8	0.06%	3	\$28,949				
3185300	18	0.06%	6	0.05%	\$71,918	\$1,627	2.26%	4	0.03%	1	\$16,368				
3184900	33	0.11%	15	0.13%	\$94,046	\$1,640	1.74%	14	0.11%	5	\$51,772				
3185702	15	0.05%	6	0.05%	...C	\$12,662	...C	3	0.02%	...C	\$39,356				
3184800	12	0.04%	3	0.03%	...C	\$18,783	...C	2	0.02%	...C	\$37,567				
3178500	12	0.04%	6	0.05%	...C	\$8,672	...C	3	0.02%	...C	\$35,979				
3186202	12	0.04%	6	0.05%	...C	\$7,284	...C	3	0.02%	...C	\$25,263				
3186900	9	0.03%	3	0.03%	...C	\$4,977	...C	4	0.03%	...C	\$25,022				
3186302	9	0.03%	3	0.03%	...C	\$9,832	...C	2	0.02%	...C	\$19,665				
3185900	12	0.04%	3	0.03%	...C	\$2,243	...C	6	0.05%	...C	\$14,158				
3186201	9	0.03%	3	0.03%	...C	\$6,245	...C	2	0.02%	...C	\$12,490				
3185701	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				
3186000	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



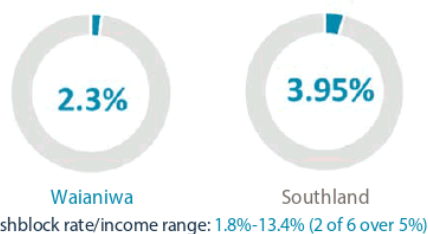
Waianiwa at a glance (rural area/split over multiple Community Boards)

The Waianiwa area unit covers more than one community board (Oreti, Oraka Apanima and Wallace Takitimu) with the majority of the area unit contained within Oreti. The area unit data below is for the entire area unit as 2013 Census income data is not currently available for each community board area. The meshblock data and map that follows shows only the meshblocks within area unit that fit within relevant board area.

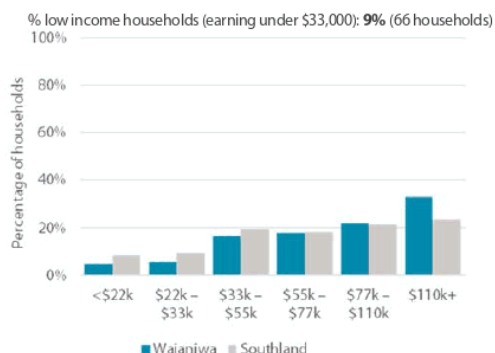
Waianiwa Area Unit data – selected properties

	Waianiwa		Southland	
Population	1,968		29,617	
Households	711		11,523	
Median Income	\$85,748		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$1,966	1,804	\$2,789	\$2,592
Rating Units	620	(943)	12,498	(20,328)
Total Rates	\$2.9m	(\$3.4m)	\$53.9m	(\$66.6m)

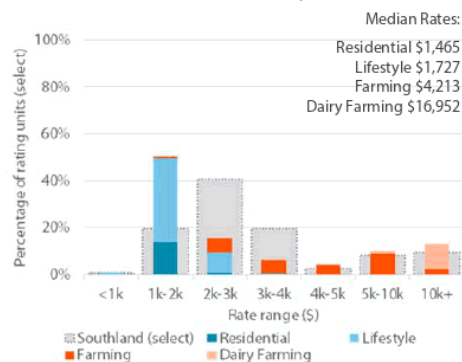
Rates as a proportion of income



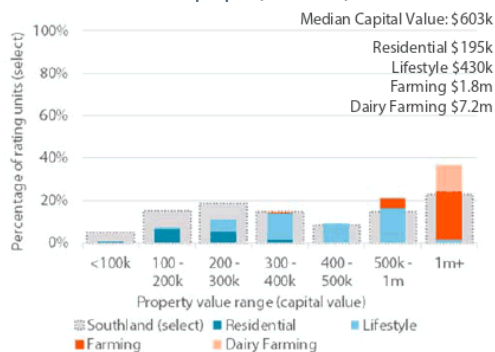
Distribution of household incomes



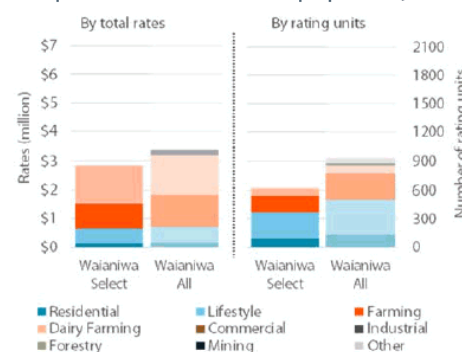
Distribution of rates by land use



Distribution of property values by land use



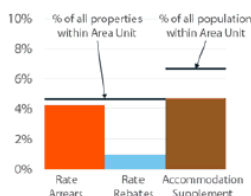
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^(SDC) + accommodation supplement

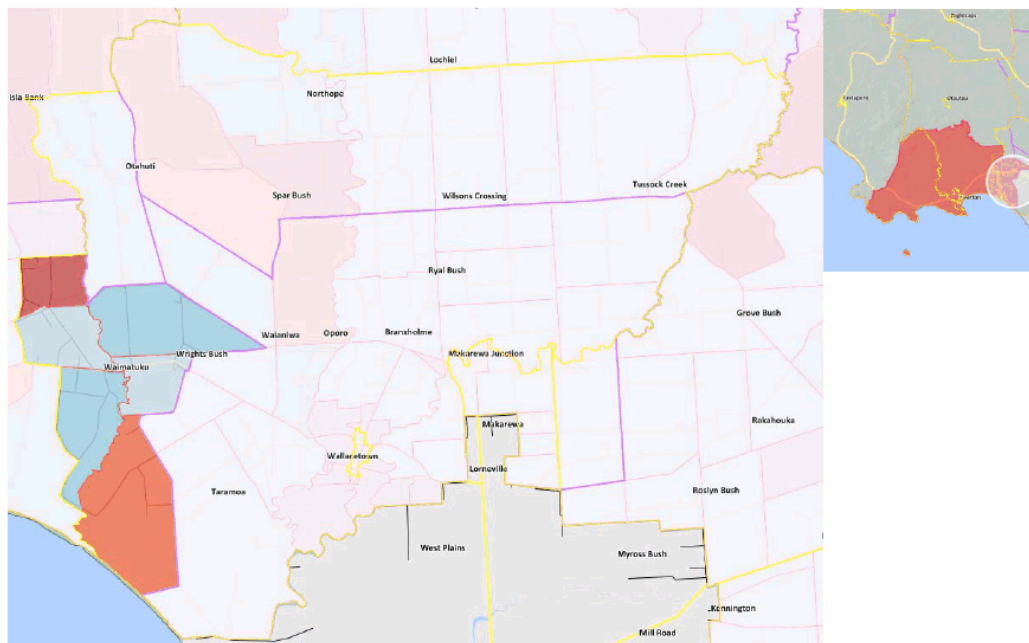


Meshblock data – selected properties

The meshblock data table and map below shows the information for the meshblocks contained within Waianiwā area unit within Oraka Aparima Community Board area. To view the meshblock and map data for this area unit within other board areas refer to the relevant community board section (Wallace Takitimu on page 151 and Oreti on page 98).

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)							
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Land use			
												Fam % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
Within Oraka Aparima Community Board area															
3185000	15	0.05%	6	0.05%	\$94,046	\$12,637	13.44%	4	0.03%	3	\$47,000	25% \$6.8m	50% \$7.6m	25% \$250k	
3079100	33	0.11%	15	0.13%	\$49,789	\$5,262	10.57%	11	0.09%	9	\$81,572	64% \$2.1m	27% \$7.2m	9% \$365k	
3078500	51	0.17%	21	0.18%	\$80,216	\$3,270	4.08%	15	0.12%	6	\$100,162				
3185600	51	0.17%	21	0.18%	\$82,982	\$3,239	3.90%	14	0.11%	5	\$72,574				
3078700	36	0.12%	15	0.13%	\$60,853	\$1,523	2.50%	16	0.13%	3	\$45,179				
3185200	51	0.17%	18	0.16%	\$82,982	\$1,478	1.78%	16	0.13%	2	\$42,984				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)

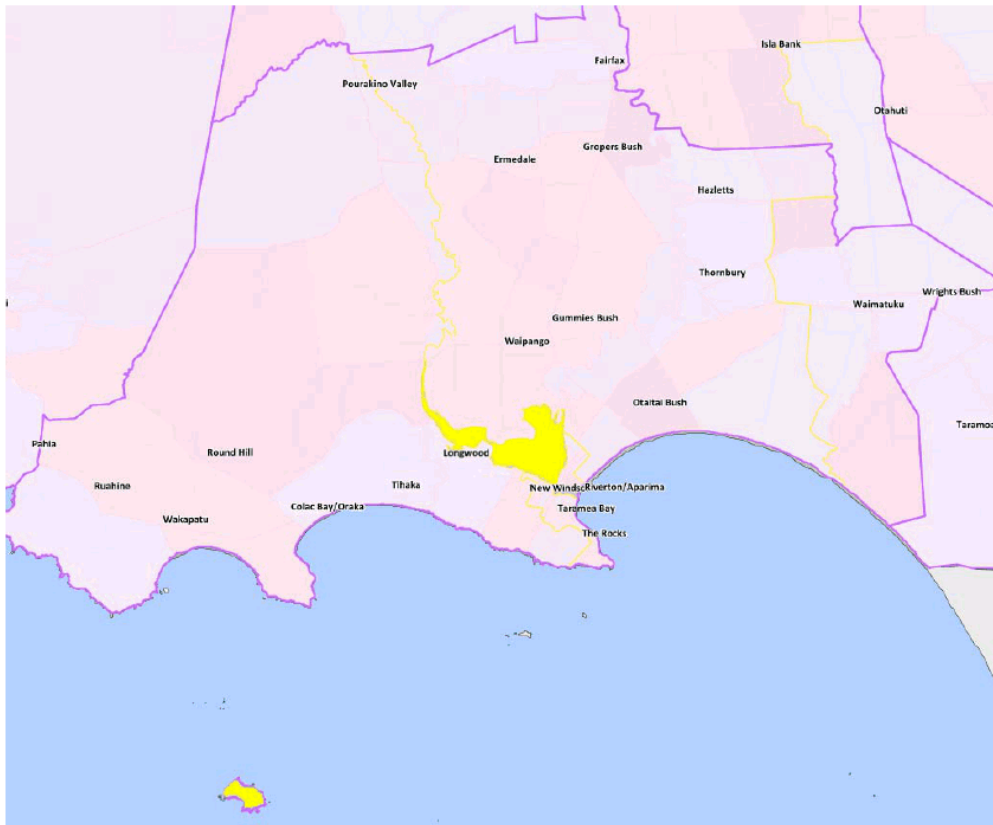


Centre Island And Inlet-Jacobs River Estuary (No income data)

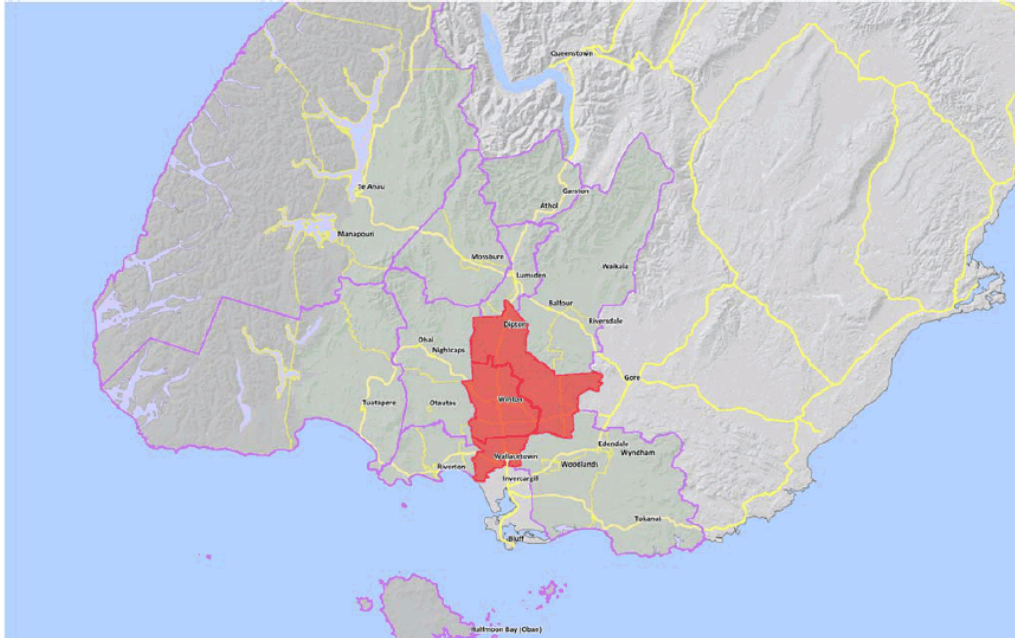
The Centre Island and Inlet-Jacobs River Estuary area units are fully contained within Oraka Aparima Community Board area.

Centre Island and Inlet-Jacobs River Estuary Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)

As there is no income data for this area unit, the rates affordability analysis cannot be completed.



Oreti Community Board



The Oreti Community Board area contains eight area units and 157 meshblocks. The area units that are either wholly or partly within community board area include:

- Wallacetown (whole) – the township urban area
- Winton (whole) – the township urban area
- Hokonui (part) – a large part of the rural area in the centre and north of the board area including the townships of Browns, Dipton and Centre Bush
- Waianiwa (part) – a large part of the rural area in the south part of the board area
- Makarewa North (whole) – the small rural lifestyle area in the south part of the board area
- Dacre (part) – a small part of the rural area in the south west part of the board area
- Fairfax (part) – a very small part of the rural area in the east centre section of the board area
- Kaweku (part) – a small part of the rural area in the south eastern part of the board area

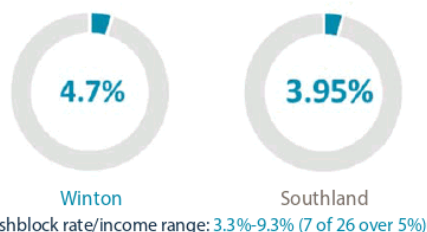
Winton at a glance (urban area)

The Winton area unit is fully contained within the Oreti Community Board.

Winton Area Unit data – selected properties

	Winton		Southland	
Population	2,211		29,617	
Households	957		11,523	
Median Income	\$58,530		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,729	\$2,723	\$2,789	\$2,592
Rating Units	1,074	(1,345)	12,498	(20,328)
Total Rates	\$2.9m	(\$3.5m)	\$53.9m	(\$66.6m)

Rates as a proportion of income

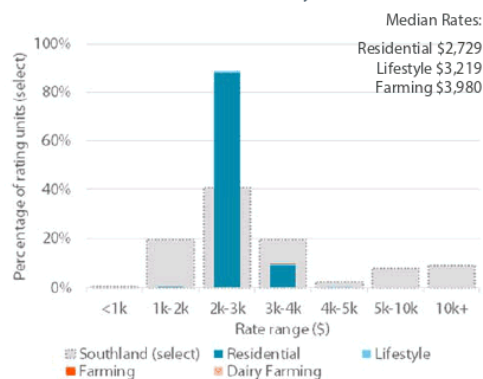


Distribution of household incomes

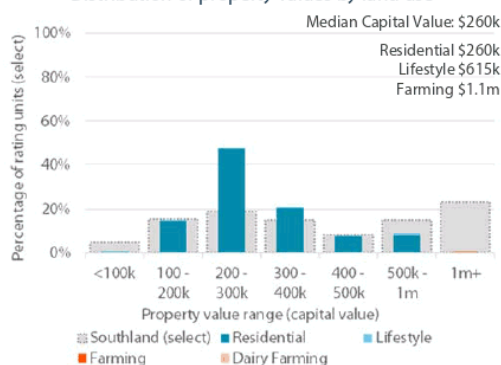
% low income households (earning under \$33,000): **24%** (231 households)



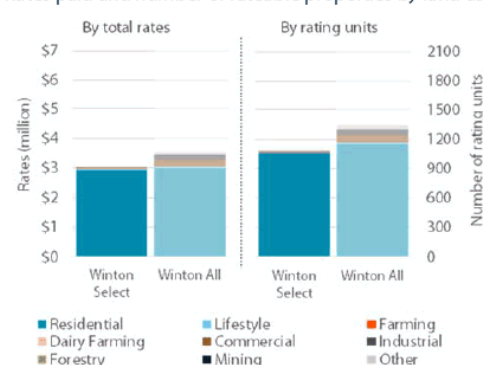
Distribution of rates by land use



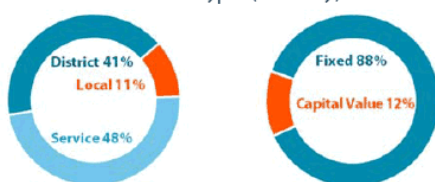
Distribution of property values by land use



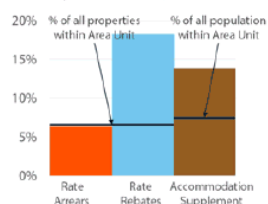
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



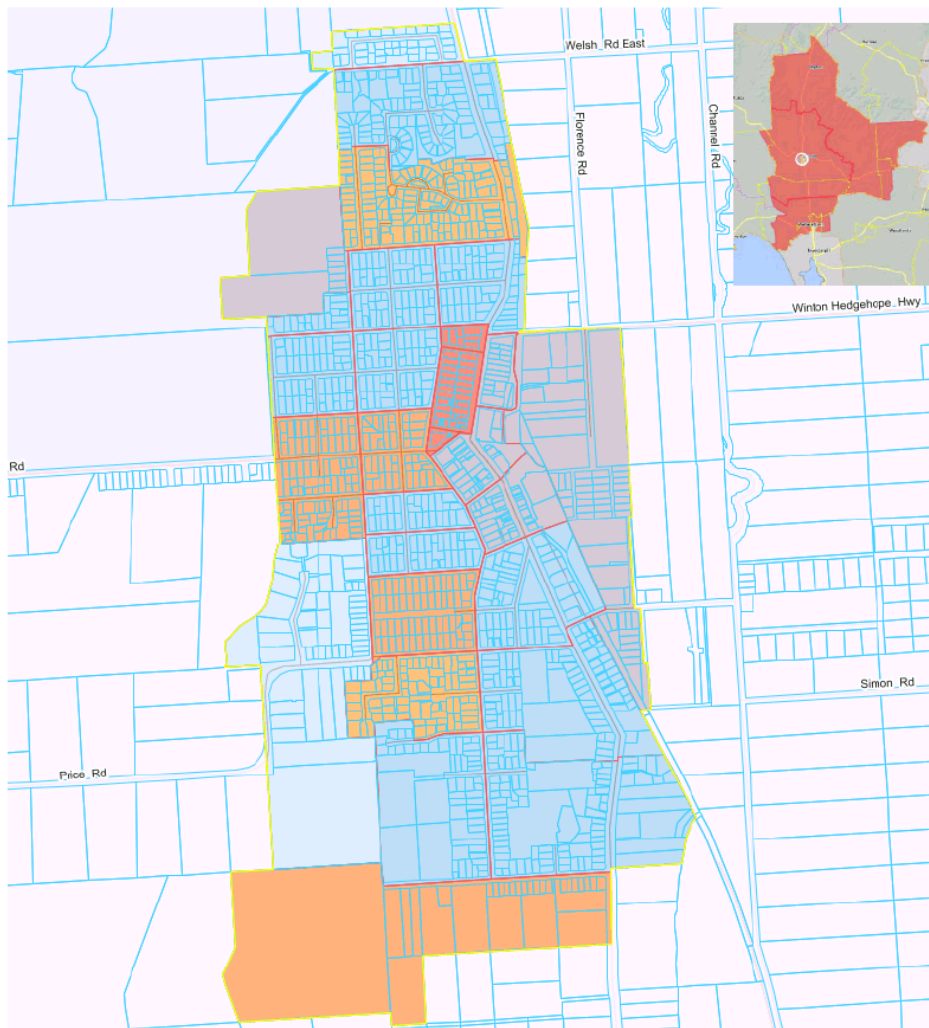
Share of rate arrears/rebates^{SDC} + accommodation supplement



Meshblock data – selected properties

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Ries % LU Av CV
3086700	30	1.36%	15	1.57%	\$28,546	\$2,660	9.32%	16	1.49%	16	\$43,071				100% \$237k
3074802	45	2.04%	18	1.88%	\$35,959	\$2,693	7.49%	18	1.68%	18	\$48,709	6% \$1.1m		16% \$438k	78% \$265k
3087000	111	5.03%	57	5.96%	\$40,163	\$2,661	6.63%	54	5.03%	53	\$149,896				100% \$236k
3084800	165	7.47%	84	8.78%	\$45,695	\$2,762	6.05%	93	8.66%	92	\$257,800				100% \$290k
3085200	24	1.09%	15	1.57%	\$43,372	\$2,619	6.04%	15	1.40%	14	\$40,305				100% \$169k
3085700	123	5.57%	57	5.96%	\$49,789	\$2,871	5.77%	74	6.89%	73	\$213,886				100% \$402k
3086100	255	11.55%	117	12.23%	\$53,108	\$2,748	5.18%	126	11.73%	112	\$345,209				100% \$278k
3086800	111	5.03%	42	4.39%	\$60,853	\$2,735	4.49%	47	4.38%	4	\$130,990				
3085600	147	6.66%	63	6.58%	\$60,853	\$2,713	4.46%	62	5.77%	2	\$170,042				
3085800	105	4.76%	45	4.70%	\$60,853	\$2,715	4.46%	45	4.19%	10	\$129,260				
3086400	102	4.62%	45	4.70%	\$60,853	\$2,703	4.44%	51	4.75%	1	\$139,175				
3085500	48	2.17%	21	2.19%	\$60,853	\$2,679	4.40%	39	3.63%	4	\$107,414				
3086000	216	9.78%	87	9.09%	\$64,505	\$2,805	4.35%	92	8.57%	3	\$258,038				
3086300	33	1.49%	12	1.25%	\$68,266	\$2,723	3.99%	15	1.40%	0	\$41,284				
3085900	147	6.66%	66	6.90%	\$68,266	\$2,696	3.95%	79	7.36%	0	\$215,940				
3085100	84	3.80%	33	3.45%	\$68,266	\$2,668	3.91%	39	3.63%	0	\$103,897				
3086500	117	5.30%	39	4.08%	\$71,918	\$2,714	3.77%	42	3.91%	0	\$114,461				
3086900	90	4.08%	42	4.39%	\$73,356	\$2,728	3.72%	46	4.28%	0	\$126,322				
3085000	84	3.80%	27	2.82%	\$74,684	\$2,704	3.62%	27	2.51%	0	\$72,760				
3084900	87	3.94%	42	4.39%	\$80,216	\$2,791	3.48%	56	5.21%	0	\$163,576				
3074702	45	2.04%	18	1.88%	\$94,046	\$3,099	3.30%	29	2.70%	0	\$88,957				
3085300	15	0.68%	3	0.31%	...C	\$2,578	...C	2	0.19%	...C	\$5,155				
3085400	3	0.14%	0	0.00%	...C	\$2,760	...C	2	0.19%	...C	\$5,520				
3086200	9	0.41%	6	0.63%	...C	\$2,822	...C	4	0.37%	...C	\$15,187				
3086600	6	0.27%	3	0.31%	...C	\$2,634	...C	1	0.09%	...C	\$2,634				
3087100	6	0.27%	0	0.00%	...C	...C	...C	0	0.00%	...C	\$0				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



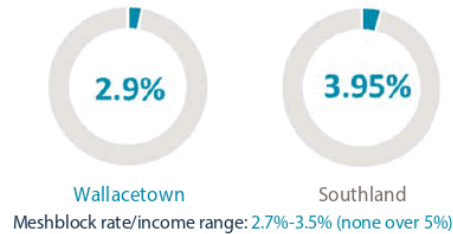
Wallacetown at a glance (urban area)

The Wallacetown area unit is fully contained within the Oreti Community Board area.

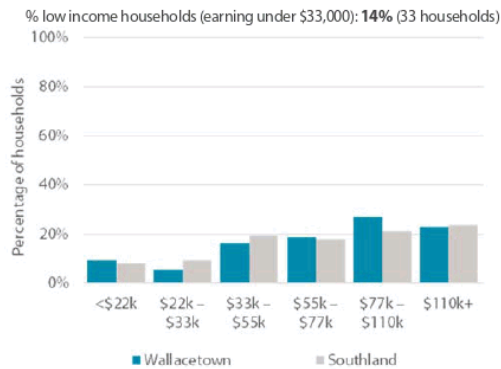
Wallacetown Area Unit data – selected properties

	Wallacetown		Southland	
Population	663		29,617	
Households	243		11,523	
Median Income	\$78,999		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,281	\$2,232	\$2,789	\$2,592
Rating Units	263	(314)	12,498	(20,328)
Total Rates	\$0.6m	(\$0.7m)	\$53.9m	(\$66.6m)

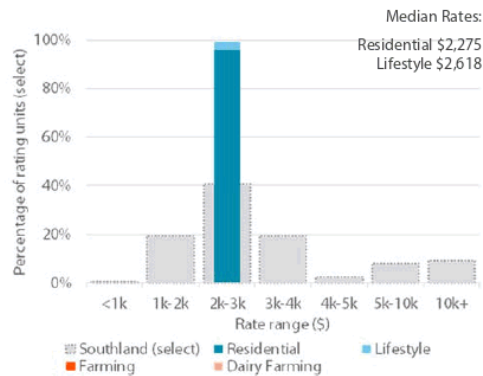
Rates as a proportion of income



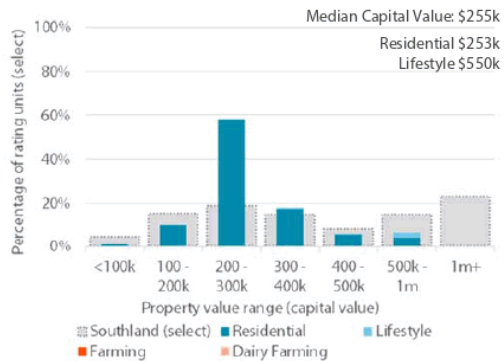
Distribution of household incomes



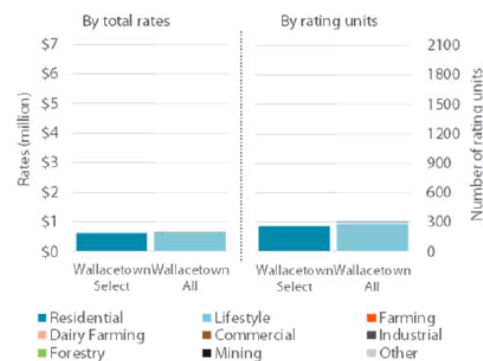
Distribution of rates by land use



Distribution of property values by land use



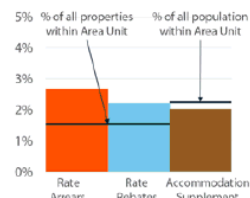
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^{SDC} + accommodation supplement



Meshblock data – selected properties

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	Life % LU Av CV	Res % LU Av CV
3079602	36	0.12%	15	0.13%	\$68,266	\$2,389	3.50%	16	0.13%	0	\$38,330				
3080002	180	0.61%	60	0.52%	\$74,684	\$2,336	3.13%	66	0.53%	0	\$156,684				
3080200	141	0.48%	57	0.50%	\$74,684	\$2,207	2.96%	60	0.48%	0	\$138,514				
3080104	201	0.68%	72	0.63%	\$79,773	\$2,306	2.89%	79	0.63%	0	\$186,897				
3080102	87	0.29%	36	0.31%	\$82,982	\$2,231	2.69%	37	0.30%	0	\$84,924				
3079902	3	0.01%	3	0.03%	...C	\$2,587	...C	1	0.01%	...C	\$2,587				
3080402	15	0.05%	3	0.03%	...C	\$2,783	...C	4	0.03%	...C	\$10,975				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



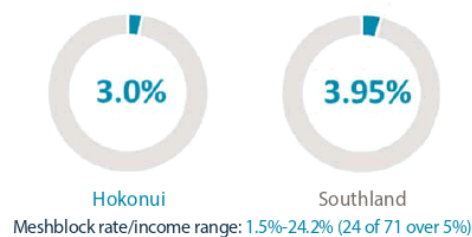
Hokonui at a glance (rural area split over multiple Community Boards)

The Hokonui area unit covers more than one community board (Oreti and Northern) with the majority of the area unit contained within Oreti. The area unit data below is for the entire area unit as 2013 Census income data is not currently available for each community board area. The meshblock data and map that follows shows only the meshblocks within area unit that fit within relevant board area.

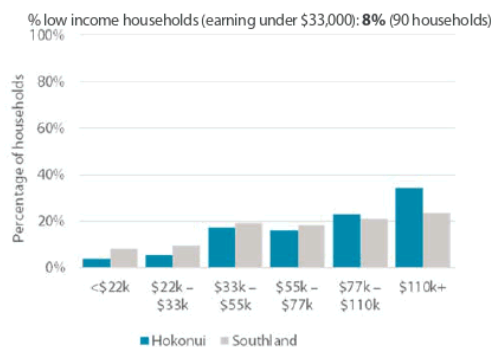
Hokonui Unit data – selected properties

	Hokonui		Southland	
Population	3,087		29,617	
Households	1,089		11,523	
Median Income	\$87,850		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,615	\$2,147	\$2,789	\$2,592
Rating Units	939	(1,651)	12,498	(20,328)
Total Rates	\$5.3m	(\$6.5m)	\$53.9m	(\$66.6m)

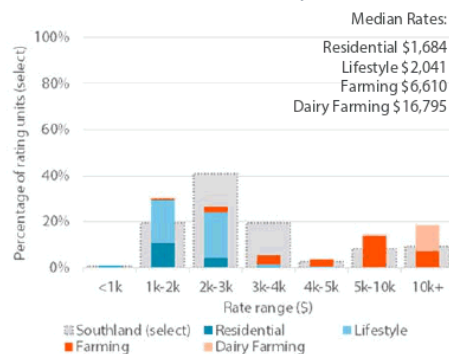
Rates as a proportion of income



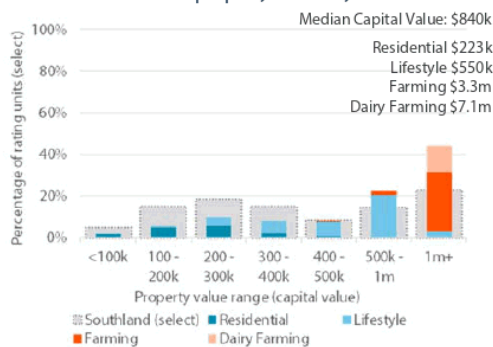
Distribution of household incomes



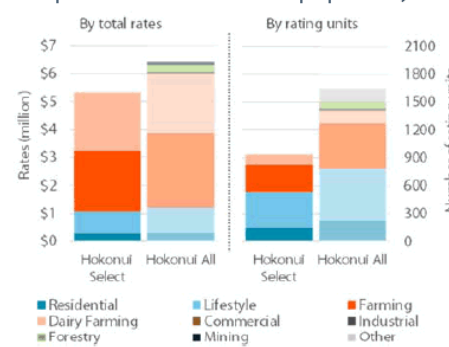
Distribution of rates by land use



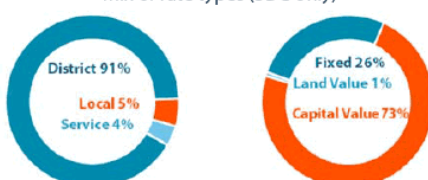
Distribution of property values by land use



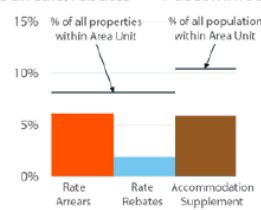
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^{SDC} + accommodation supplement



Meshblock data – selected properties

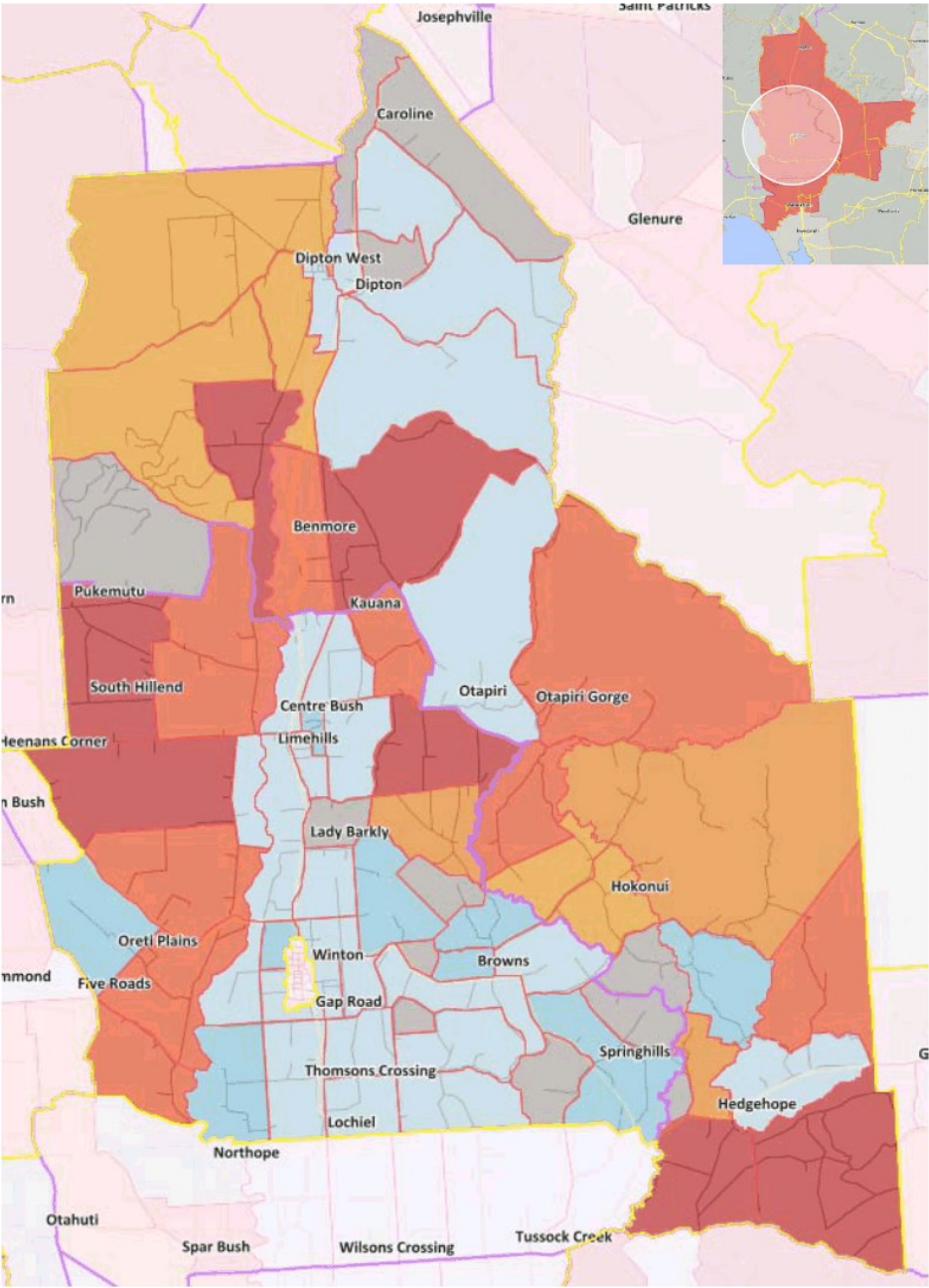
The meshblock data table and the map below shows the information for the meshblocks contained within Hokonui area unit within Oreti Community Board area. To view the meshblock and map data for this area unit within Northern Community Board area refer to page 68.

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
Within Oreti Community Board area															
3072500	48	0.16%	18	0.16%	\$77,450	\$18,736	24.19%	7	0.06%	6	\$108,391		86% \$8.2m	14%	
3088700	48	0.16%	18	0.16%	\$68,266	\$13,294	19.47%	11	0.09%	9	\$180,086	9% \$2.7m	73% \$9m	18%	\$713k
3071300	105	0.35%	36	0.31%	\$71,918	\$13,020	18.10%	16	0.13%	15	\$201,065	38% \$3.6m	56% \$8.1m	6%	\$320k
3071700	57	0.19%	18	0.16%	\$77,450	\$11,929	15.40%	8	0.06%	5	\$90,050	24% \$6.8m	38% \$8m	38%	\$337k
3088800	39	0.13%	15	0.13%	\$68,266	\$10,361	15.18%	6	0.05%	5	\$75,616	33% \$3.7m	50% \$9m	17%	\$520k
3074100	84	0.28%	30	0.26%	\$89,952	\$13,289	14.77%	14	0.11%	11	\$182,856	43% \$5m	43% \$8.9m	14%	\$405k
3071000	33	0.11%	9	0.08%	\$94,046	\$13,783	14.66%	7	0.06%	7	\$113,598	57% \$5.7m	43% \$8.6m		
3071800	33	0.11%	9	0.08%	\$71,918	\$8,632	12.00%	8	0.06%	5	\$89,437	24% \$4.7m	38% \$10.6m	38%	
3071200	51	0.17%	21	0.18%	\$88,514	\$10,418	11.77%	13	0.10%	7	\$125,535	31% \$5.2m	23% \$7.5m	46%	\$558k
3077701	39	0.13%	15	0.13%	\$71,918	\$8,312	11.56%	7	0.06%	5	\$81,722	29% \$3.3m	42% \$9.5m	29%	\$450k
3088400	18	0.06%	6	0.05%	\$49,789	\$5,148	10.34%	7	0.06%	5	\$37,958	57% \$3.1m	14% \$5.4m	29%	
3077800	60	0.20%	18	0.16%	\$94,046	\$9,426	10.02%	12	0.10%	8	\$120,648	17% \$4m	49% \$7m	17%	\$90k
3071100	84	0.28%	27	0.23%	\$94,046	\$9,039	9.61%	19	0.15%	12	\$163,432	58% \$4.3m	21% \$6.5m	16%	\$5%
3073400	45	0.15%	12	0.10%	\$138,303	\$13,124	9.49%	7	0.06%	6	\$86,178	43% \$4.7m	57% \$6.9m		
3074300	63	0.21%	21	0.18%	\$94,046	\$8,281	8.81%	18	0.14%	12	\$164,246	61% \$4.4m	17% \$7.8m	22%	\$479k
3072000	42	0.14%	12	0.10%	\$82,982	\$6,712	8.09%	13	0.10%	11	\$111,523	85% \$5.5m		15%	\$343k
3072700	30	0.10%	12	0.10%	\$77,450	\$5,994	7.74%	10	0.08%	6	\$83,028	60% \$3.6m	20% \$8.6m	20%	
3073600	72	0.24%	24	0.21%	\$71,918	\$5,456	7.59%	20	0.16%	13	\$121,574	80% \$3.2m	5% \$9.5m	15%	\$342k
3076200	18	0.06%	9	0.08%	\$68,266	\$4,987	7.31%	3	0.02%	2	\$13,818	33% \$4.1m	33% \$2.1m	33%	
3070600	93	0.31%	30	0.26%	\$88,514	\$5,167	5.84%	26	0.21%	15	\$211,328	46% \$3.6m	27% \$7.6m	23%	\$440k
3070800	24	0.08%	9	0.08%	\$97,697	\$5,693	5.83%	8	0.06%	7	\$60,060	74% \$3.4m	13% \$7.1m	13%	\$455k
3070901	42	0.14%	15	0.13%	\$116,175	\$6,732	5.79%	12	0.10%	7	\$102,541	75% \$4.7m	8% \$7.6m	17%	\$313k
3073500	12	0.04%	6	0.05%	\$138,303	\$7,889	5.70%	7	0.06%	5	\$53,787	72% \$4.1m	14% \$6m	14%	\$270k
3073700	45	0.15%	12	0.10%	\$119,826	\$6,240	5.21%	8	0.06%	4	\$60,029	50% \$3.3m	25% \$7.3m	25%	\$458k
3073200	18	0.06%	9	0.08%	\$94,046	\$4,471	4.75%	10	0.08%	4	\$40,443				
3076000	33	0.11%	12	0.10%	\$102,344	\$4,692	4.58%	14	0.11%	6	\$77,485				
3072200	27	0.09%	12	0.10%	\$40,606	\$1,844	4.54%	13	0.10%	5	\$25,097				
3072800	30	0.10%	15	0.13%	\$60,853	\$2,714	4.46%	11	0.09%	5	\$32,902				
3074400	66	0.22%	21	0.18%	\$152,134	\$6,445	4.24%	13	0.10%	4	\$111,176				
3073300	45	0.15%	18	0.16%	\$49,789	\$1,999	4.02%	23	0.18%	3	\$55,786				
3074000	21	0.07%	6	0.05%	\$165,964	\$6,441	3.88%	4	0.03%	1	\$39,119				
3074704	33	0.11%	12	0.10%	\$81,101	\$3,116	3.84%	13	0.10%	3	\$47,895				
3074900	45	0.15%	18	0.16%	\$138,303	\$5,055	3.66%	12	0.10%	6	\$110,011				
3074200	21	0.07%	6	0.05%	\$138,303	\$4,834	3.50%	6	0.05%	3	\$35,648				

Assessing Southland rates affordability

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
3046700	30	0.10%	9	0.08%	\$43,372	\$1,517	3.50%	14	0.11%	1	\$34,360				
3073000	63	0.21%	21	0.18%	\$60,853	\$2,077	3.41%	21	0.17%	4	\$65,453				
3074703	48	0.16%	15	0.13%	\$85,748	\$2,659	3.10%	17	0.14%	2	\$70,760				
3046500	30	0.10%	6	0.05%	\$60,853	\$1,770	2.91%	7	0.06%	3	\$25,296				
3075000	102	0.34%	33	0.29%	\$82,982	\$2,399	2.89%	32	0.26%	5	\$131,130				
3071500	45	0.15%	18	0.16%	\$85,748	\$2,466	2.88%	16	0.13%	7	\$105,029				
3071400	51	0.17%	21	0.18%	\$60,853	\$1,751	2.88%	19	0.15%	3	\$64,207				
3072400	36	0.12%	12	0.10%	\$98,693	\$2,779	2.82%	8	0.06%	3	\$61,049				
3046300	30	0.10%	12	0.10%	\$57,202	\$1,600	2.80%	14	0.11%	6	\$64,501				
3074801	135	0.46%	54	0.47%	\$102,344	\$2,782	2.72%	56	0.45%	0	\$154,218				
3075800	57	0.19%	21	0.18%	\$94,046	\$2,421	2.57%	24	0.19%	4	\$87,666				
3075200	45	0.15%	15	0.13%	\$94,046	\$2,396	2.55%	12	0.10%	1	\$52,202				
3072300	87	0.29%	30	0.26%	\$71,918	\$1,822	2.53%	29	0.23%	1	\$69,621				
3074600	102	0.34%	39	0.34%	\$94,046	\$2,322	2.47%	35	0.28%	5	\$135,430				
3073800	33	0.11%	12	0.10%	\$85,748	\$2,037	2.38%	11	0.09%	3	\$47,144				
3075100	93	0.31%	36	0.31%	\$94,046	\$2,124	2.26%	38	0.30%	0	\$84,404				
3073100	51	0.17%	21	0.18%	\$94,046	\$2,126	2.26%	25	0.20%	0	\$57,042				
3072100	33	0.11%	12	0.10%	\$103,230	\$2,292	2.22%	12	0.10%	3	\$58,742				
3075400	36	0.12%	15	0.13%	\$124,473	\$2,289	1.84%	15	0.12%	3	\$61,627				
3075700	39	0.13%	12	0.10%	\$138,303	\$2,449	1.77%	12	0.10%	3	\$45,876				
3071900	51	0.17%	15	0.13%	\$119,826	\$2,012	1.68%	12	0.10%	5	\$64,550				
3075300	93	0.31%	30	0.26%	\$138,303	\$2,282	1.65%	31	0.25%	2	\$90,070				
3070700	33	0.11%	12	0.10%	\$94,046	\$1,529	1.63%	11	0.09%	1	\$23,065				
3088600	51	0.17%	18	0.16%	\$138,303	\$2,237	1.62%	14	0.11%	4	\$83,302				
3075500	63	0.21%	21	0.18%	\$119,826	\$1,801	1.50%	20	0.16%	3	\$70,976				
3072600	12	0.04%	3	0.03%	...C	\$3,400	...C	8	0.06%	...C	\$49,950				
3076100	9	0.03%	3	0.03%	...C	\$7,843	...C	3	0.02%	...C	\$27,595				
3075900	12	0.04%	6	0.05%	...C	\$3,521	...C	5	0.04%	...C	\$26,962				
3073900	9	0.03%	3	0.03%	...C	\$8,324	...C	3	0.02%	...C	\$25,477				
3045900	0	0.00%	0	0.00%	...C	\$11,802	...C	2	0.02%	...C	\$23,603				
3070902	6	0.02%	0	0.00%	...C	\$8,811	...C	2	0.02%	...C	\$17,622				
3046400	12	0.04%	3	0.03%	...C	\$6,358	...C	2	0.02%	...C	\$12,716				
3075600	12	0.04%	6	0.05%	...C	\$1,917	...C	4	0.03%	...C	\$12,664				
3072902	6	0.02%	3	0.03%	...C	\$3,093	...C	4	0.03%	...C	\$12,085				
3046600	15	0.05%	6	0.05%	...C	\$1,625	...C	5	0.04%	...C	\$8,372				
3072901	6	0.02%	0	0.00%	...C	\$3,256	...C	2	0.02%	...C	\$6,512				
3076300	3	0.01%	3	0.03%	...C	\$1,492	...C	1	0.01%	...C	\$1,492				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



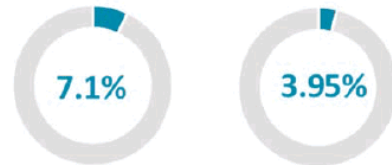
Kaweku at a glance (rural area split over multiple Community Boards)

The Kaweku area unit covers more than one Community Board (Ardlussa and Oreti) with the majority of the area unit contained within Ardlussa. The area unit data below is for the entire area unit as 2013 Census income data is not currently available for each community board area. The meshblock data and map that follows shows only the meshblocks within area unit that fit within relevant board area.

Kaweku Area Unit data – selected properties

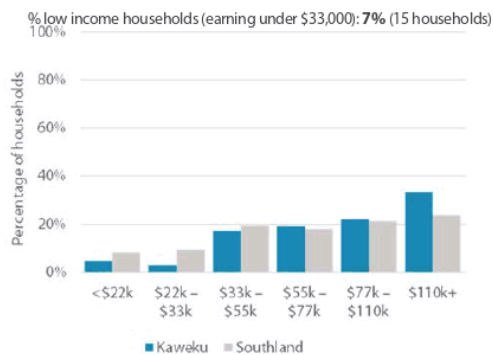
	Kaweku		Southland	
Population	567		29,617	
Households	204		11,523	
Median Income	\$88,072		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$6,262	\$3,397	\$2,789	\$2,592
Rating Units	166	(306)	12,498	(20,328)
Total Rates	\$1.4m	(\$1.6m)	\$53.9m	(\$66.6m)

Rates as a proportion of income

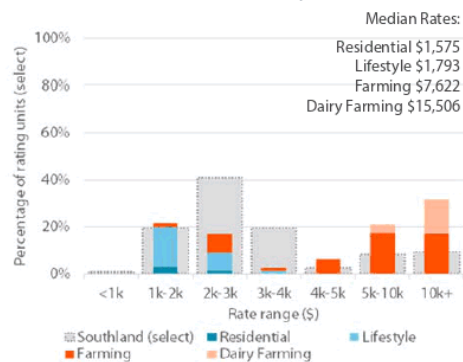


Meshblock rate/income range: 3.8% (none over 5%)

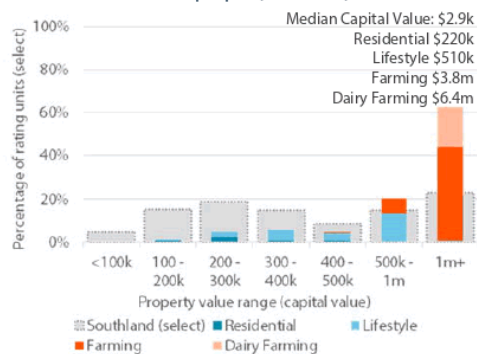
Distribution of household incomes



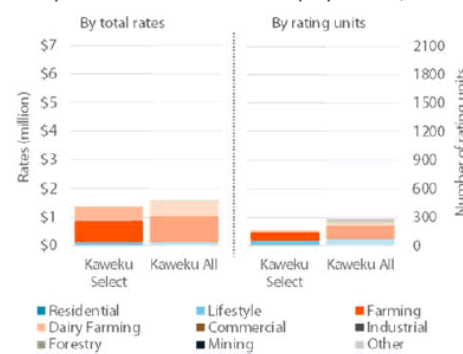
Distribution of rates by land use



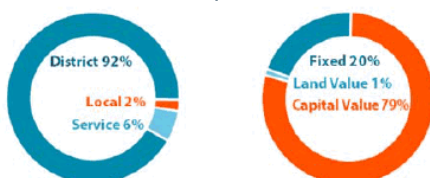
Distribution of property values by land use



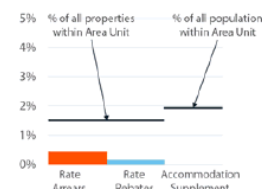
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^(SDC) + accommodation supplement

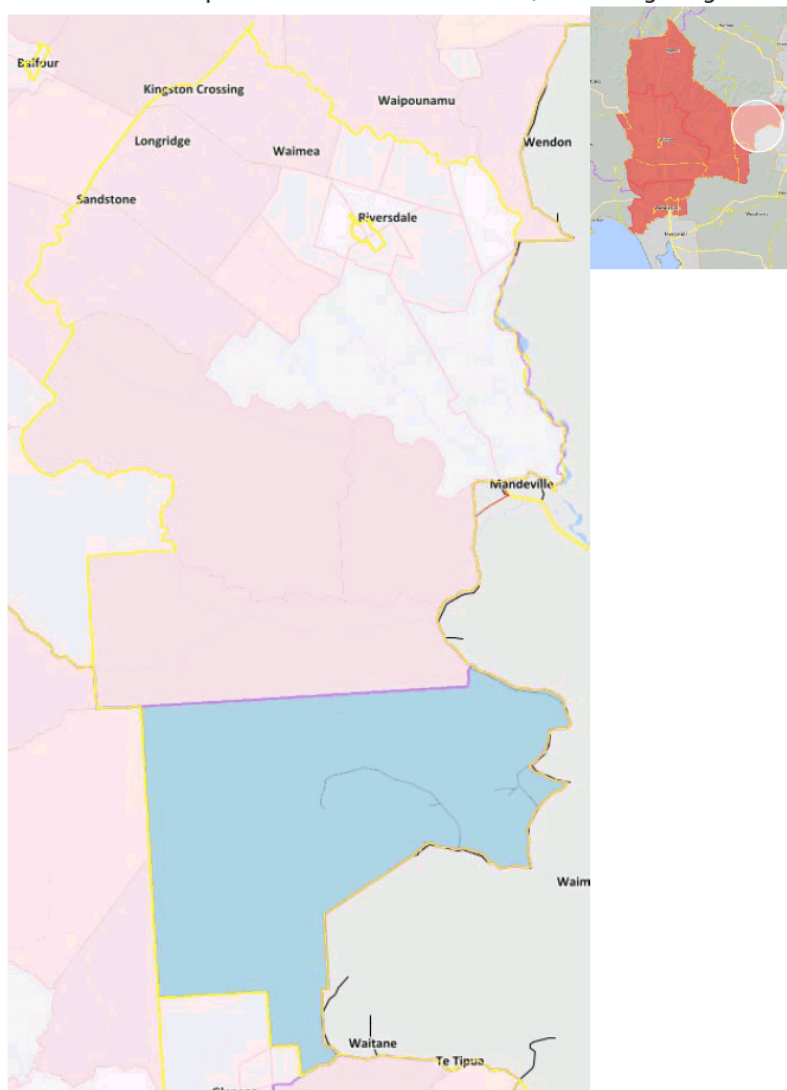


Meshblock data – selected properties

The meshblock data table and the map below shows the information for the meshblocks contained within Kaweku area unit within Oreti Community Board area. To view the meshblock and map data for this area unit within Ardlussa Community Board area refer to page 36.

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
Within Oreti Community Board area															
3052600	36	0.12%	15	0.13%	\$82,982	\$3,176	3.83%	18	0.14%	8	\$108,518				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



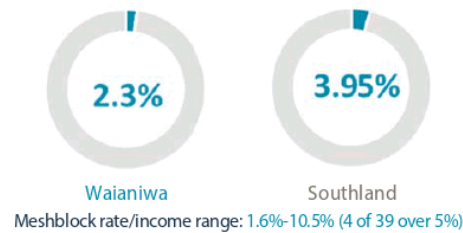
Waianiwa at a glance (rural area/split over multiple Community Boards)

The Waianiwa area unit covers more than one community board (Oreti, Oraka Aparima and Wallace Takitimu) with the majority of the area unit contained within Oreti. The area unit data below is for the entire area unit as 2013 Census income data is not currently available for each community board area. The meshblock data and map that follows shows only the meshblocks within area unit that fit within relevant board area.

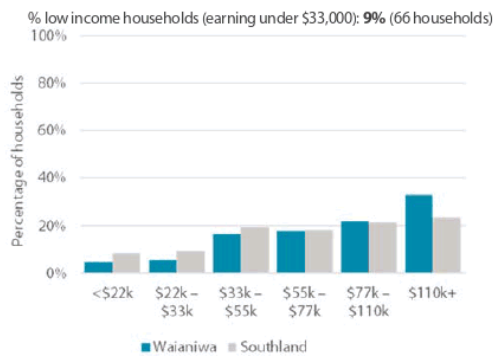
Waianiwa Area Unit data – selected properties

	Waianiwa		Southland	
Population	1,968		29,617	
Households	711		11,523	
Median Income	\$85,748		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$1,966	1,804	\$2,789	\$2,592
Rating Units	620	(943)	12,498	(20,328)
Total Rates	\$2.9m	(\$3.4m)	\$53.9m	(\$66.6m)

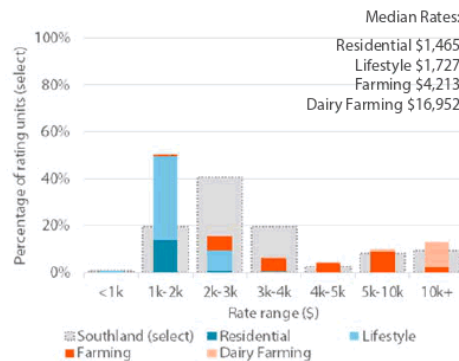
Rates as a proportion of income



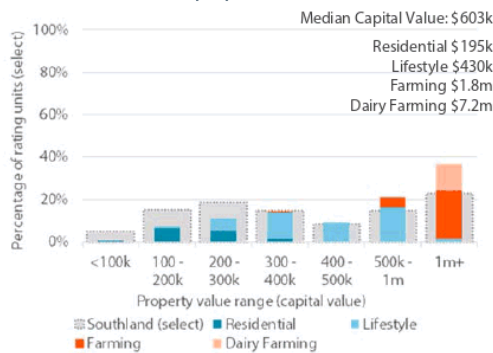
Distribution of household incomes



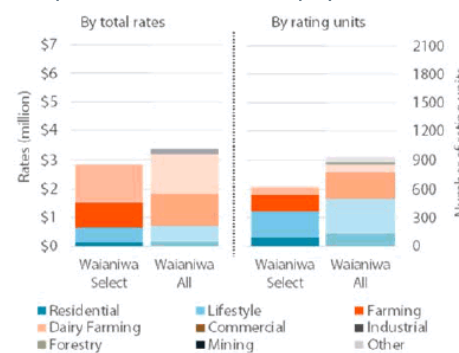
Distribution of rates by land use



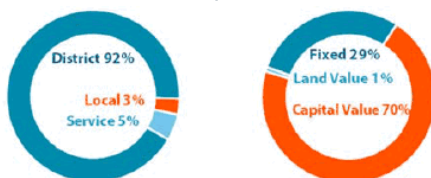
Distribution of property values by land use



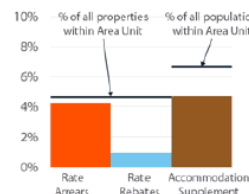
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^(SDC) + accommodation supplement



Meshblock data – selected properties

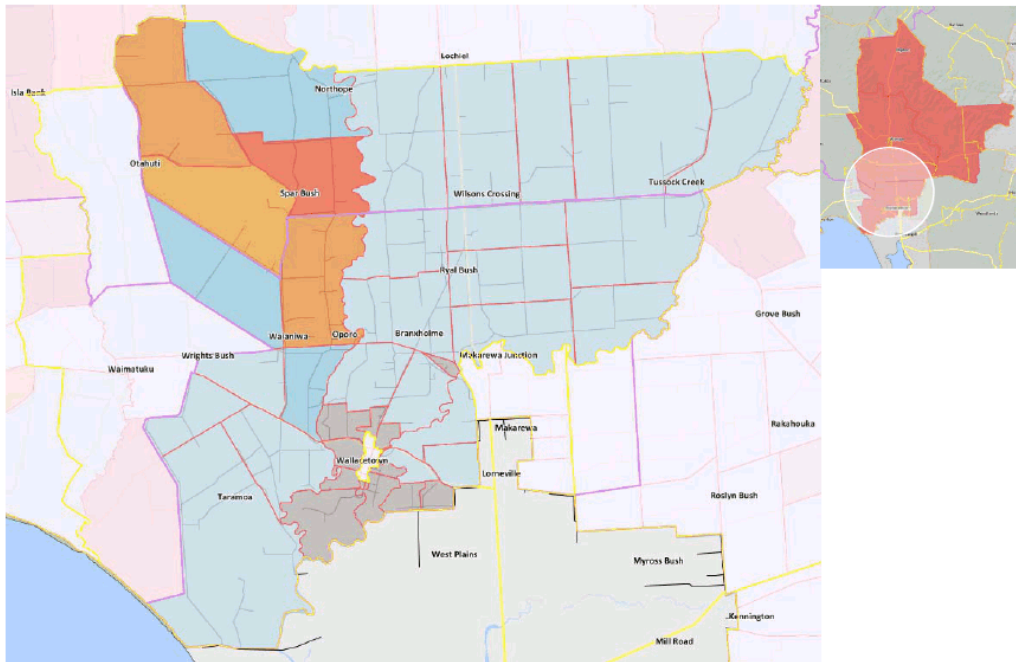
The meshblock data table and map below shows the information for the meshblocks contained within Waianiwa area unit within Oreti Community Board area. To view the meshblock and map data for this area unit within other board areas refer to the relevant community board section (Wallace Takitimu on page 151 and Oraka Aparima on page 83).

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
Within Oreti Community Board area															
3078300	33	0.11%	9	0.08%	\$94,046	\$9,844	10.47%	7	0.06%	4	\$72,032	29% \$7.7m	29% \$6.5m	42% \$445k	
3077900	63	0.21%	24	0.21%	\$62,734	\$4,201	6.70%	15	0.12%	8	\$133,312	33% \$2.6m	40% \$7.9m	27% \$232k	
3078600	36	0.12%	15	0.13%	\$138,303	\$8,323	6.02%	9	0.07%	8	\$95,391	56% \$2.8m	44% \$5.7m		
3078200	51	0.17%	21	0.18%	\$71,918	\$4,053	5.64%	13	0.10%	7	\$94,173	46% \$3.7m	15% \$9.7m	31% \$503k	8% \$155k
3079000	33	0.11%	12	0.10%	\$49,789	\$2,143	4.31%	9	0.07%	4	\$44,583				
3078000	60	0.20%	18	0.16%	\$103,230	\$4,168	4.04%	12	0.10%	5	\$86,583				
3078400	63	0.21%	24	0.21%	\$71,918	\$2,634	3.66%	20	0.16%	9	\$104,088				
3080500	33	0.11%	12	0.10%	\$58,087	\$2,028	3.49%	12	0.10%	3	\$40,287				
3079300	33	0.11%	12	0.10%	\$103,230	\$3,217	3.12%	10	0.08%	3	\$65,424				
3076700	99	0.33%	36	0.31%	\$71,918	\$2,203	3.06%	32	0.26%	11	\$160,461				
3076900	75	0.25%	24	0.21%	\$82,982	\$2,487	3.00%	25	0.20%	9	\$118,694				
3077000	33	0.11%	9	0.08%	\$110,643	\$2,932	2.65%	11	0.09%	2	\$35,801				
3079200	45	0.15%	15	0.13%	\$99,578	\$2,595	2.61%	16	0.13%	2	\$59,223				
3079800	21	0.07%	9	0.08%	\$83,867	\$2,026	2.42%	12	0.10%	1	\$50,347				
3076800	54	0.18%	18	0.16%	\$115,290	\$2,756	2.39%	12	0.10%	4	\$75,782				
3077400	69	0.23%	24	0.21%	\$74,684	\$1,623	2.17%	23	0.18%	4	\$89,941				
3077300	63	0.21%	24	0.21%	\$82,982	\$1,767	2.13%	19	0.15%	4	\$50,331				
3076500	81	0.27%	30	0.26%	\$99,578	\$2,113	2.12%	26	0.21%	4	\$119,298				
3077500	72	0.24%	30	0.26%	\$94,046	\$1,903	2.02%	28	0.22%	4	\$83,198				
3080600	30	0.10%	9	0.08%	\$94,046	\$1,888	2.01%	10	0.08%	0	\$19,657				
3076600	57	0.19%	21	0.18%	\$85,748	\$1,714	2.00%	13	0.10%	4	\$86,999				
3078800	90	0.30%	30	0.26%	\$79,331	\$1,574	1.98%	33	0.26%	2	\$68,931				
3077200	129	0.44%	48	0.42%	\$89,952	\$1,757	1.95%	44	0.35%	2	\$121,464				
3078900	27	0.09%	9	0.08%	\$94,046	\$1,813	1.93%	8	0.06%	1	\$21,738				
3080800	63	0.21%	21	0.18%	\$85,748	\$1,622	1.89%	19	0.15%	1	\$39,591				
3076400	90	0.30%	33	0.29%	\$115,290	\$2,049	1.78%	30	0.24%	6	\$147,529				
3079500	51	0.17%	18	0.16%	\$124,473	\$2,102	1.69%	19	0.15%	2	\$54,731				
3077100	24	0.08%	12	0.10%	\$119,826	\$1,876	1.57%	13	0.10%	2	\$56,230				
3080404	15	0.05%	3	0.03%	...C	\$2,551	...C	4	0.03%	...C	\$48,650				
3080103	9	0.03%	3	0.03%	...C	\$2,324	...C	3	0.02%	...C	\$35,438				
3079604	15	0.05%	6	0.05%	...C	\$2,798	...C	5	0.04%	...C	\$12,889				
3080106	3	0.01%	3	0.03%	...C	\$2,236	...C	3	0.02%	...C	\$9,478				
3079603	12	0.04%	6	0.05%	...C	\$2,520	...C	2	0.02%	...C	\$5,039				
3079901	3	0.01%	0	0.00%	...C	\$3,940	...C	1	0.01%	...C	\$3,940				
3080403	0	0.00%	0	0.00%	...C	\$2,818	...C	1	0.01%	...C	\$2,818				

Assessing Southland rates affordability

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
3080001	3	0.01%	0	0.00%	...C	\$1,919	...C	1	0.01%	...C	\$1,919				
3080700	12	0.04%	3	0.03%	...C	\$1,712	...C	1	0.01%	...C	\$1,712				
3079700	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				
3080105	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



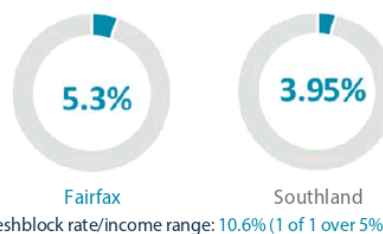
Fairfax at a glance (rural area split over multiple Community Boards)

The Fairfax area unit covers more than one community board (Wallace Takitimu, Oraka Apanima and Oreti) with the majority of the area unit contained within Wallace Takitimu. The area unit data below is for the entire area unit as 2013 Census income data is not currently available for each community board area. The meshblock data and map that follows shows only the meshblocks within area unit that fit within relevant board area.

Fairfax Area Unit data – selected properties

	Fairfax		Southland	
Population	1,908		29,617	
Households	693		11,523	
Median Income	\$84,863		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$4,499	\$2,455	\$2,789	\$2,592
Rating Units	510	(834)	12,498	(20,328)
Total Rates	\$3.8m	(\$4.1m)	\$53.9m	(\$66.6m)

Rates as a proportion of income



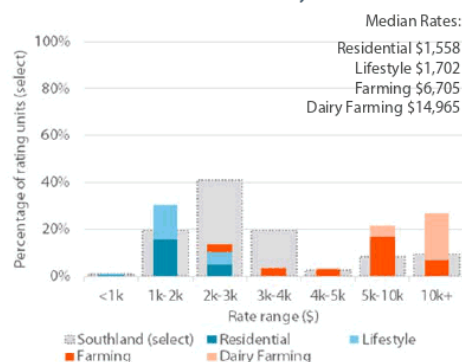
Meshblock rate/income range: 10.6% (1 of 1 over 5%)

Distribution of household incomes

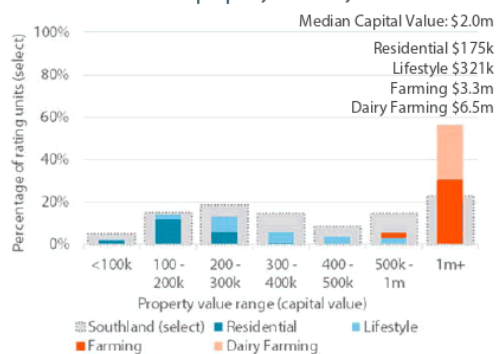
% low income households (earning under \$33,000): **10%** (72 households)



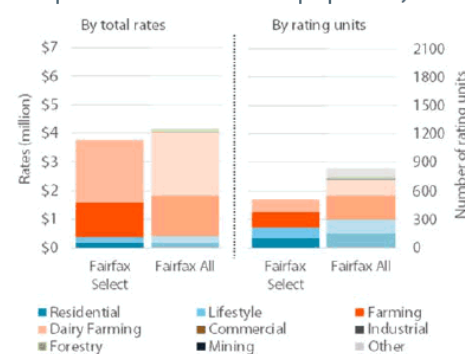
Distribution of rates by land use



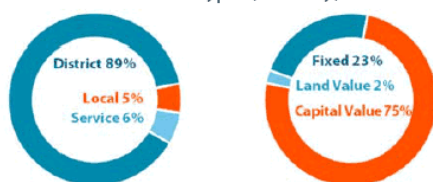
Distribution of property values by land use



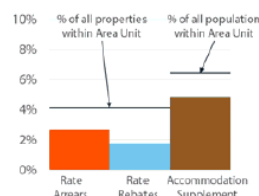
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^(SDC) + accommodation supplement

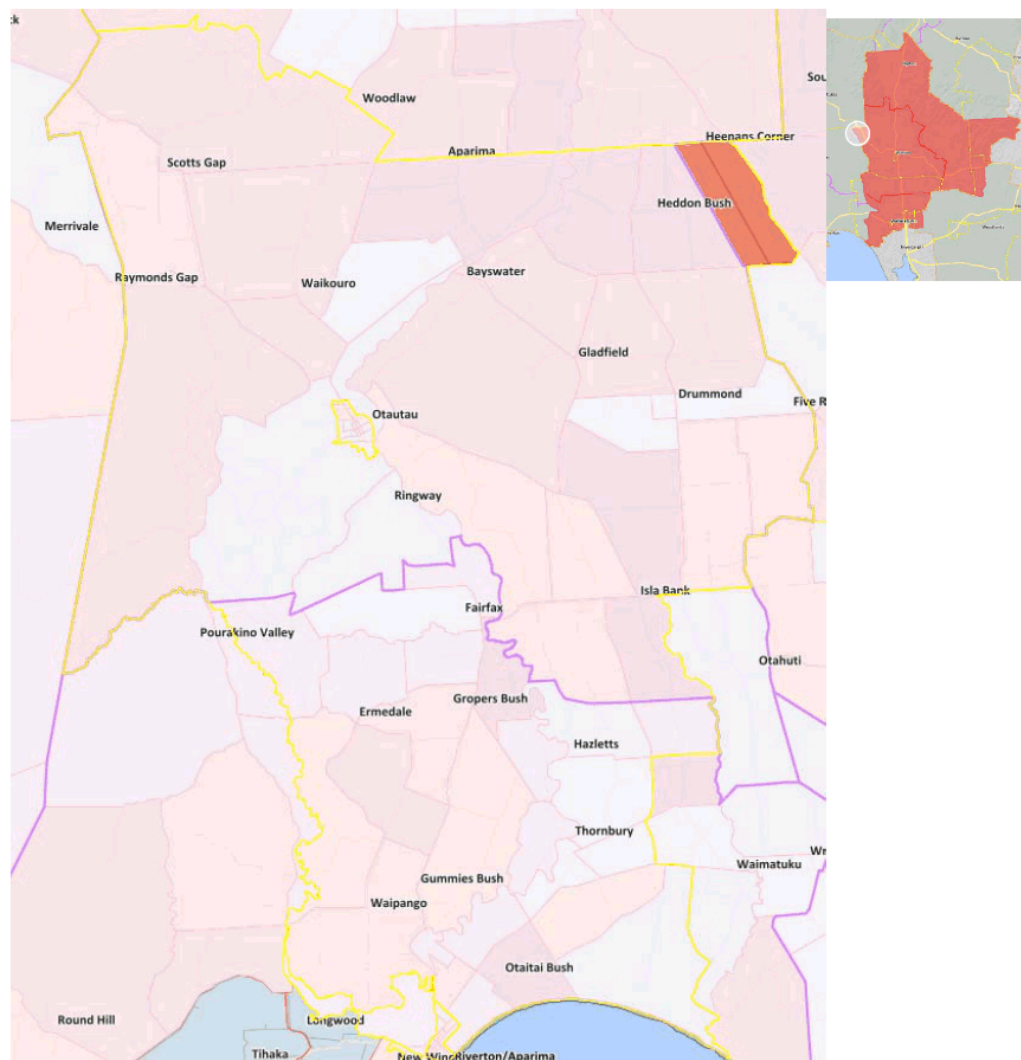


Meshblock data – selected properties

The meshblock data table and map below shows the information for the meshblocks contained within Fairfax area unit within Oreti Community Board area. To view the meshblock and map data for this area unit within other board areas refer to the relevant community board section (Wallace Takitimu on page 145 and Oraka Aparima on page 80).

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)							
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	Life % LU Av CV	Res % LU Av CV
Within Oreti Community Board area															
3183001	33	0.11%	15	0.13%	\$60,853	\$6,468	10.63%	8	0.06%	5	\$86,306	25% \$5.9m	50% \$6.8m	13% \$225k	13% \$275k

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



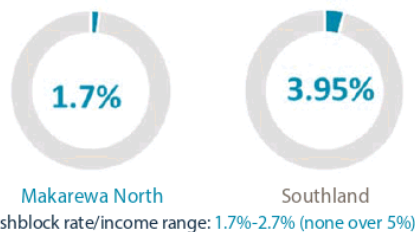
Makarewa North at a glance (rural area)

The Makarewa North area unit is fully contained within the Oreti Community Board area.

Makarewa North Area Unit data – selected properties

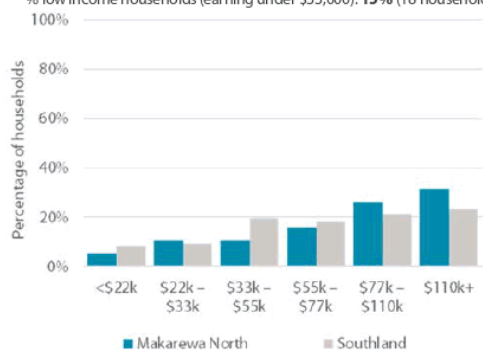
	Makarewa North		Southland	
Population	327		29,617	
Households	120		11,523	
Median Income	\$90,727		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$1,579	\$1,517	\$2,789	\$2,592
Rating Units	129	(160)	12,498	(20,328)
Total Rates	\$230k	(\$260k)	\$53.9m	(\$66.6m)

Rates as a proportion of income

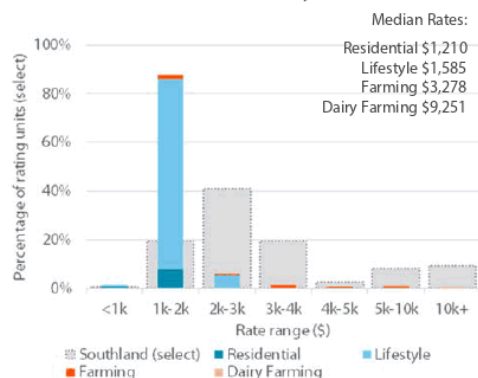


Distribution of household incomes

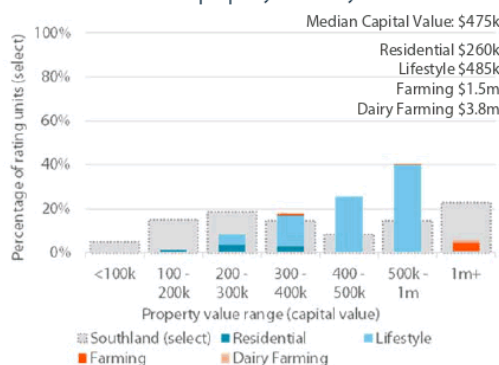
% low income households (earning under \$33,000): 15% (18 households)



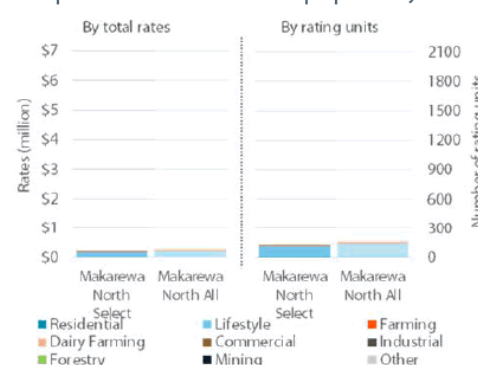
Distribution of rates by land use



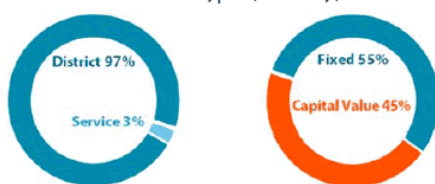
Distribution of property values by land use



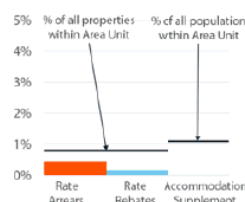
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



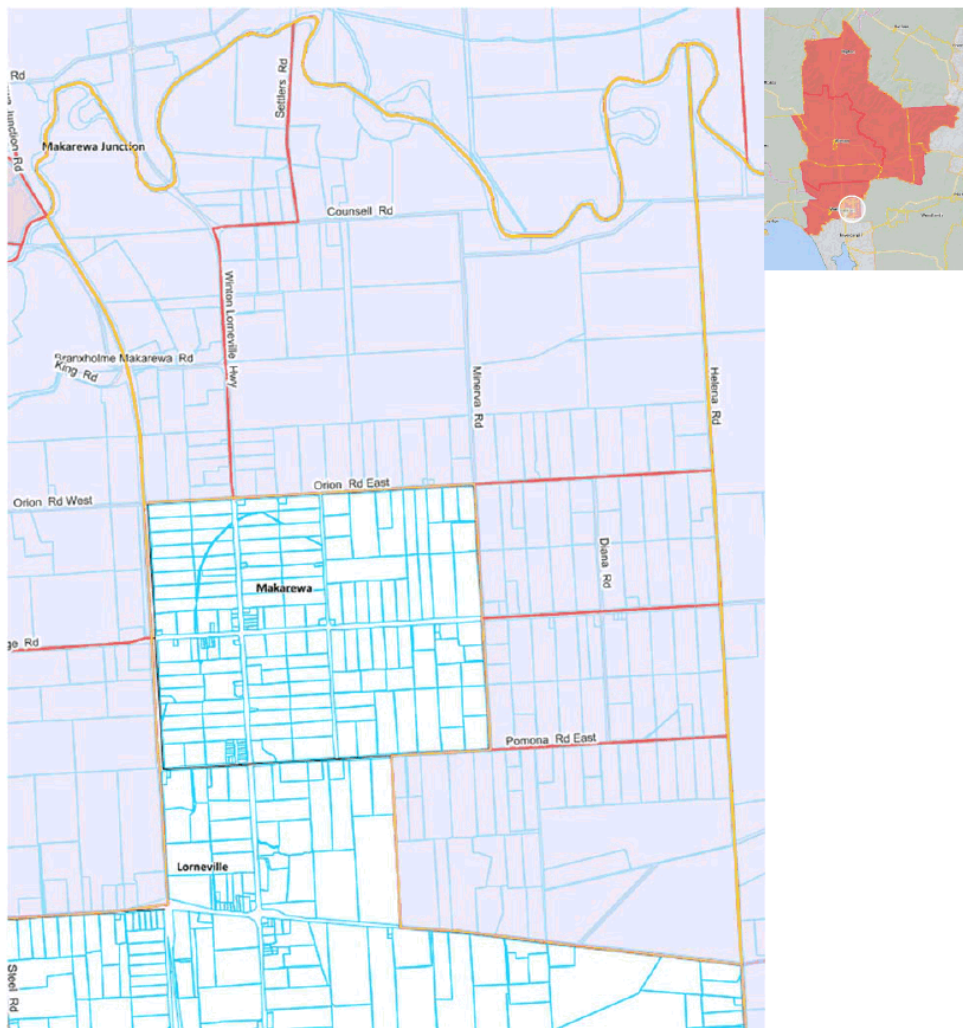
Share of rate arrears/rebates^{SDQ} + accommodation supplement



Meshblock data – selected properties

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
3081000	60	0.20%	21	0.18%	\$58,087	\$1,590	2.74%	22	0.18%	1	\$38,628				
3090300	81	0.27%	30	0.26%	\$88,514	\$1,707	1.93%	35	0.28%	2	\$76,524				
3090800	66	0.22%	27	0.23%	\$80,216	\$1,457	1.82%	25	0.20%	0	\$37,026				
3091000	60	0.20%	24	0.21%	\$94,046	\$1,614	1.72%	22	0.18%	0	\$38,820				
3090600	57	0.19%	21	0.18%	\$94,046	\$1,566	1.67%	25	0.20%	0	\$38,592				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



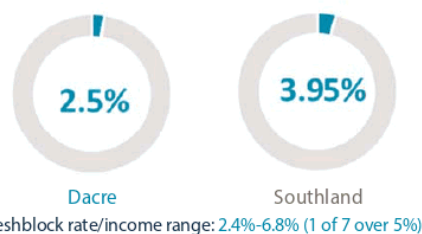
Dacre at a glance (rural area split over multiple Community Boards)

The Dacre area unit covers more than one community board (Waihopa Toetoe and Oreti) with the majority of the area unit contained within Waihopa Toetoe. The area unit data below is for the entire area unit as 2013 Census income data is not currently available for each community board area. The meshblock data and map that follows shows only the meshblocks within area unit that fit within relevant board area.

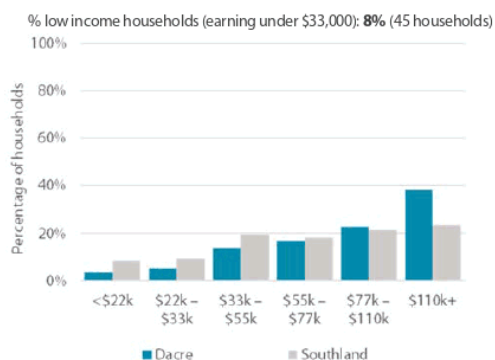
Dacre Area Unit data – selected properties

	Dacre		Southland	
Population	1,617		29,617	
Households	579		11,523	
Median Income	\$93,161		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,356	\$2,101	\$2,789	\$2,592
Rating Units	504	(680)	12,498	(20,328)
Total Rates	\$2.7m	(\$3.0m)	\$53.9m	(\$66.6m)

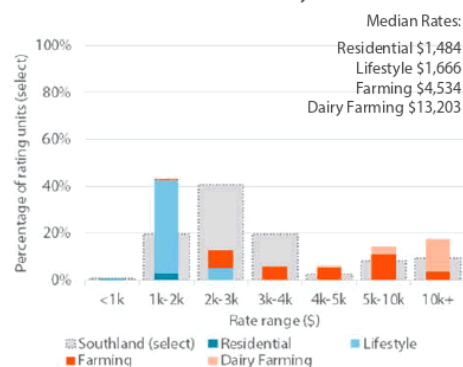
Rates as a proportion of income



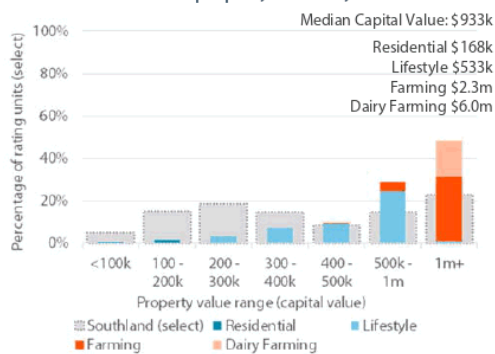
Distribution of household incomes



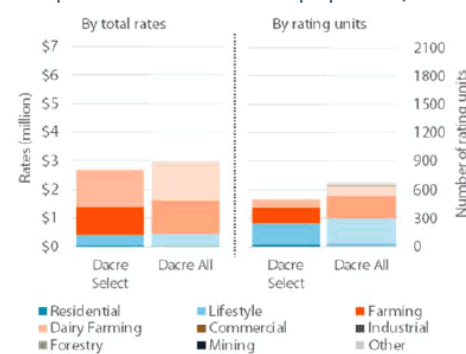
Distribution of rates by land use



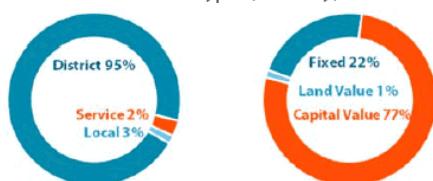
Distribution of property values by land use



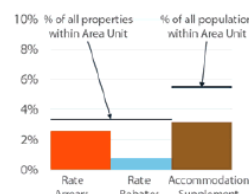
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^(SDC) + accommodation supplement

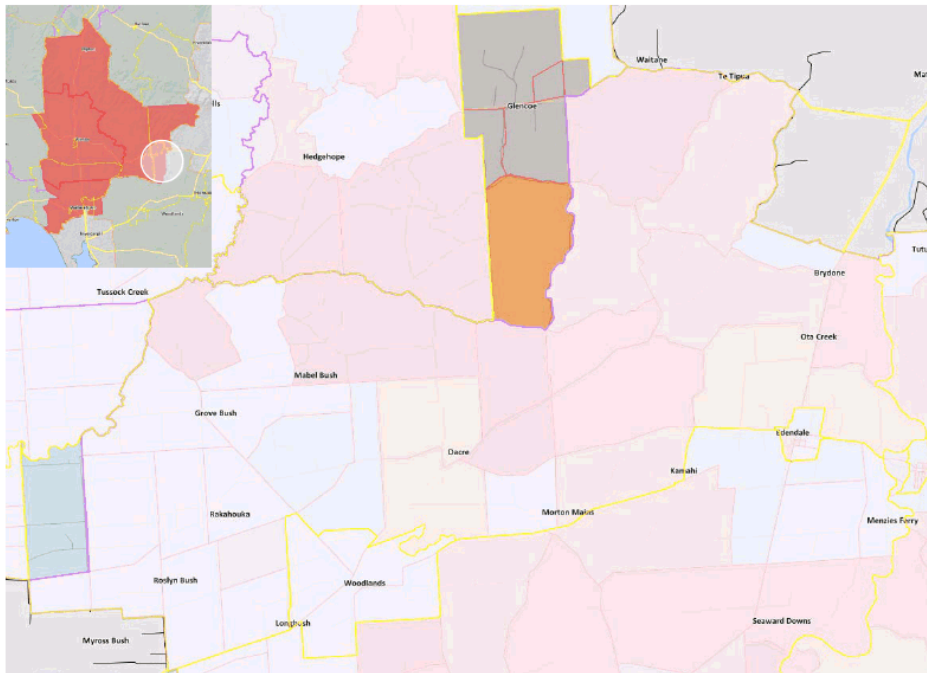


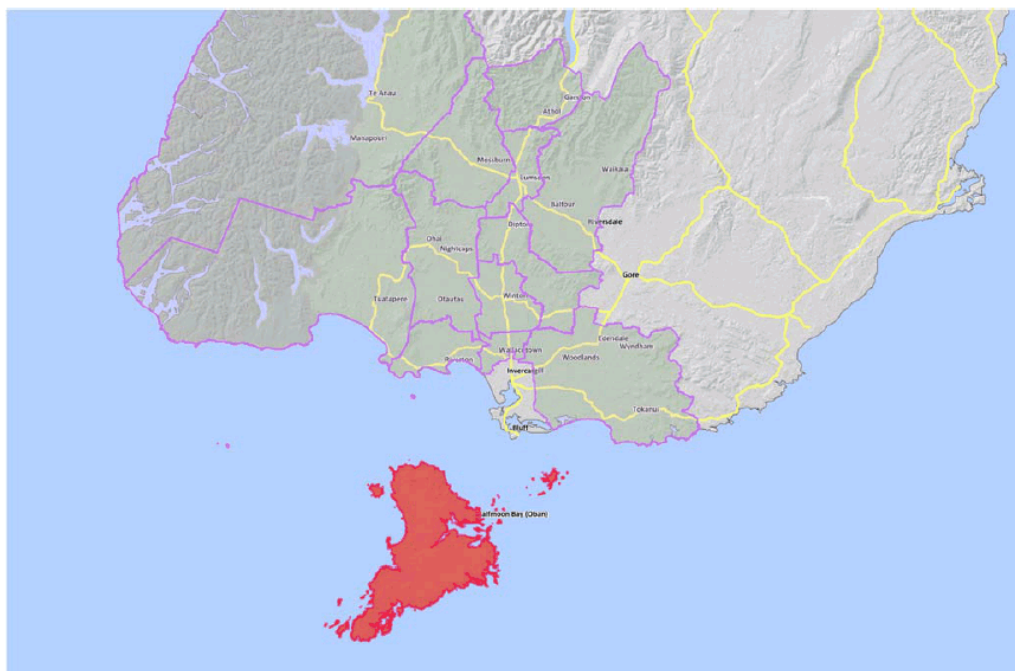
Meshblock data – selected properties

The meshblock data table and the map below shows the information for the meshblocks contained within Dacre area unit within Oreti Community Board area. To view the meshblock and map data for this area unit within Waihopa Toetoe Community Board area refer to page 128.

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)							
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
Within Oreti Community Board area															
3088900	21	0.07%	6	0.05%	\$138,303	\$9,397	6.79%	7	0.06%	4	\$56,407	86% \$4.2m	14% \$4.9m		
3090400	129	0.44%	48	0.42%	\$71,918	\$1,695	2.36%	53	0.42%	4	\$129,256				
3087202	15	0.05%	3	0.03%	...C	\$8,199	...C	5	0.04%	...C	\$37,380				
3088501	9	0.03%	3	0.03%	...C	\$2,621	...C	7	0.06%	...C	\$20,753				
3088502	12	0.04%	6	0.05%	...C	\$1,622	...C	4	0.03%	...C	\$6,823				
3087201	3	0.01%	3	0.03%	...C	\$3,292	...C	1	0.01%	...C	\$3,292				
3087301	0	0.00%	0	0.00%	...C	\$2,981	...C	1	0.01%	...C	\$2,981				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



Stewart Island/Rakiura Community Board

The Stewart Island/Rakiura Community Board area contains one area unit (Stewart Island) and 13 meshblocks. The area unit includes the township of Oban.

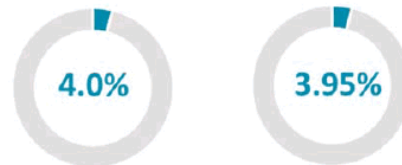
Stewart Island at a glance (urban and conservation)

The Stewart Island area unit is fully contained within the Stewart Island / Rakiura Community Board.

Stewart Island Area Unit data – selected properties

	Stewart Island		Southland	
Population	381		29,617	
Households	171		11,523	
Median Income	\$59,526		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,353	\$2,222	\$2,789	\$2,592
Rating Units	334	(762)	12,498	(20,328)
Total Rates	\$0.83m	(\$1.2m)	\$53.9m	(\$66.6m)

Rates as a proportion of income



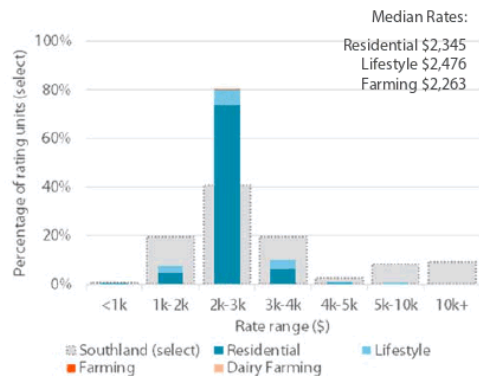
Meshblock rate/income range: 2.4%-6.8% (3 of 13 over 5%)

Distribution of household incomes

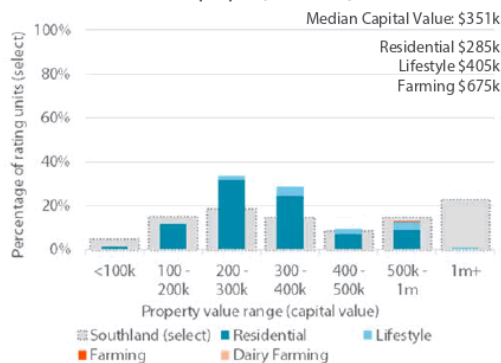
% low income households (earning under \$33,000): **26%** (45 households)



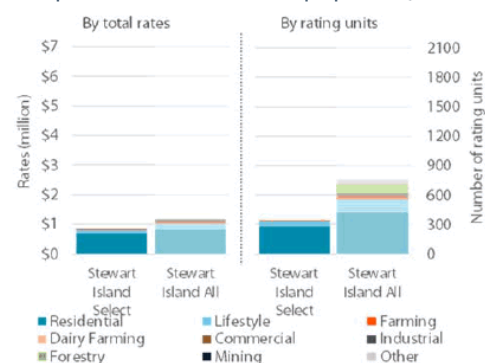
Distribution of rates by land use



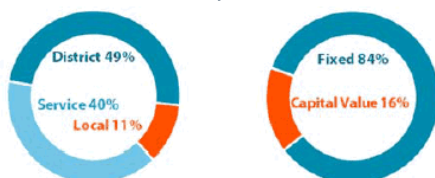
Distribution of property values by land use



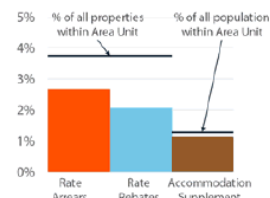
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



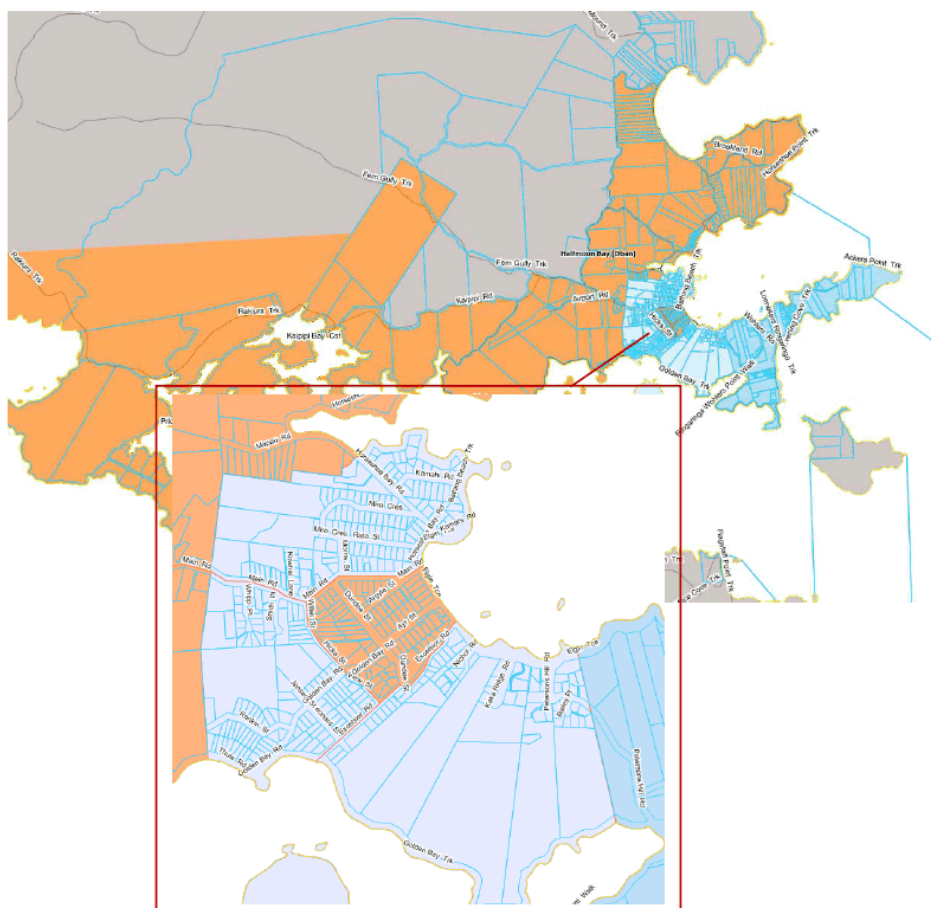
Share of rate arrears/rebates^{SDC} + accommodation supplement



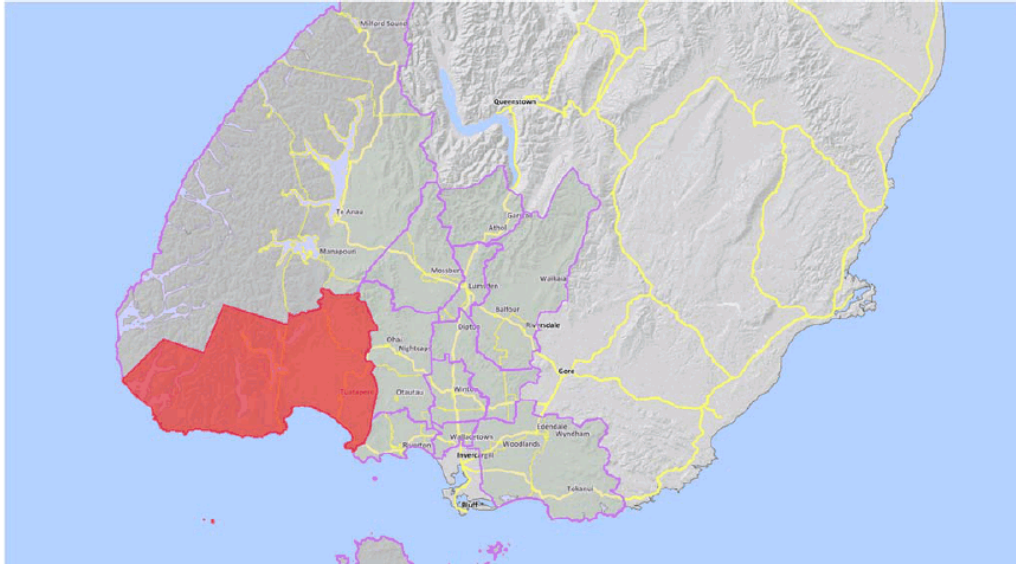
Meshblock data – selected properties

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
3154400	84	0.28%	36	0.31%	\$35,959	\$2,439	6.78%	59	0.47%	54	\$149,493			44%	56%
3154700	42	0.14%	18	0.16%	\$35,959	\$2,360	6.56%	37	0.30%	36	\$87,929			\$454k	\$321k
3154300	9	0.03%	9	0.08%	\$30,427	\$1,939	6.37%	11	0.09%	11	\$24,538	9%	\$675k	27%	64%
3154901	51	0.17%	27	0.23%	\$51,670	\$2,350	4.55%	43	0.34%	14	\$110,646				
3154800	24	0.08%	9	0.08%	\$71,918	\$2,514	3.50%	33	0.26%	1	\$84,650				
3154600	84	0.28%	33	0.29%	\$68,266	\$2,288	3.35%	69	0.55%	3	\$167,043				
3154500	75	0.25%	36	0.31%	\$81,654	\$2,280	2.79%	70	0.56%	0	\$163,254				
3154201	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				
3154202	9	0.03%	6	0.05%	...C	\$3,080	...C	11	0.09%	...C	\$39,033				
3154205	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				
3154902	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				
3155004	3	0.01%	0	0.00%	...C	\$1,302	...C	1	0.01%	...C	\$1,302				
3155005	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



Tuatapere Te Waewae Community Board



The Tuatapere Te Waewae Community Board area contains four area units and 54 meshblocks. The area units that are either wholly or partly within community board area include:

- Tuatapere (whole) – the township urban area
- Te Waewae (whole) – the rural area in the central part of the board area including the Orepuke township
- Wairio (part) – a small section of the rural area in the north western part of the board area
- Fiordland (part) – the large conservation area in the southern part of the board area (contains no income data)

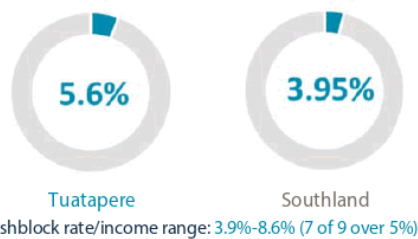
Tuatapere at a glance (urban area)

The Tuatapere area unit is fully contained within the Tuatapere Te Waewae Community Board.

Tuatapere Area Unit data – selected properties

	Tuatapere		Southland	
Population	558		29,617	
Households	246		11,523	
Median Income	\$46,470		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,624	\$2,589	\$2,789	\$2,592
Rating Units	261	(384)	12,498	(20,328)
Total Rates	\$0.7m	(\$0.85m)	\$53.9m	(\$66.6m)

Rates as a proportion of income

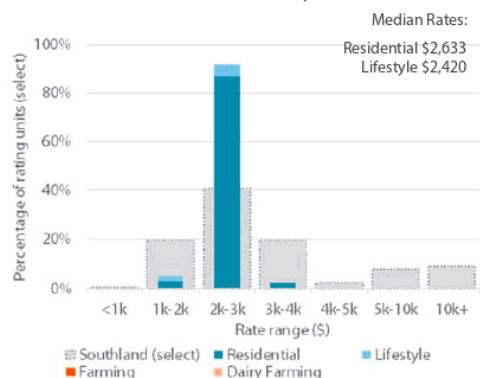


Distribution of household incomes

% low income households (earning under \$33,000): **24%** (60 households)



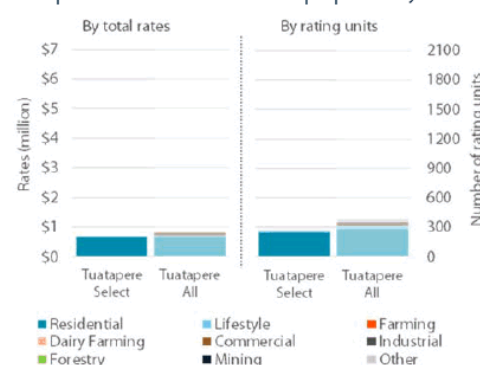
Distribution of rates by land use



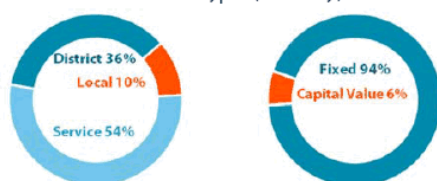
Distribution of property values by land use



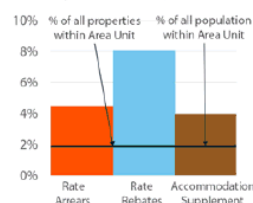
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



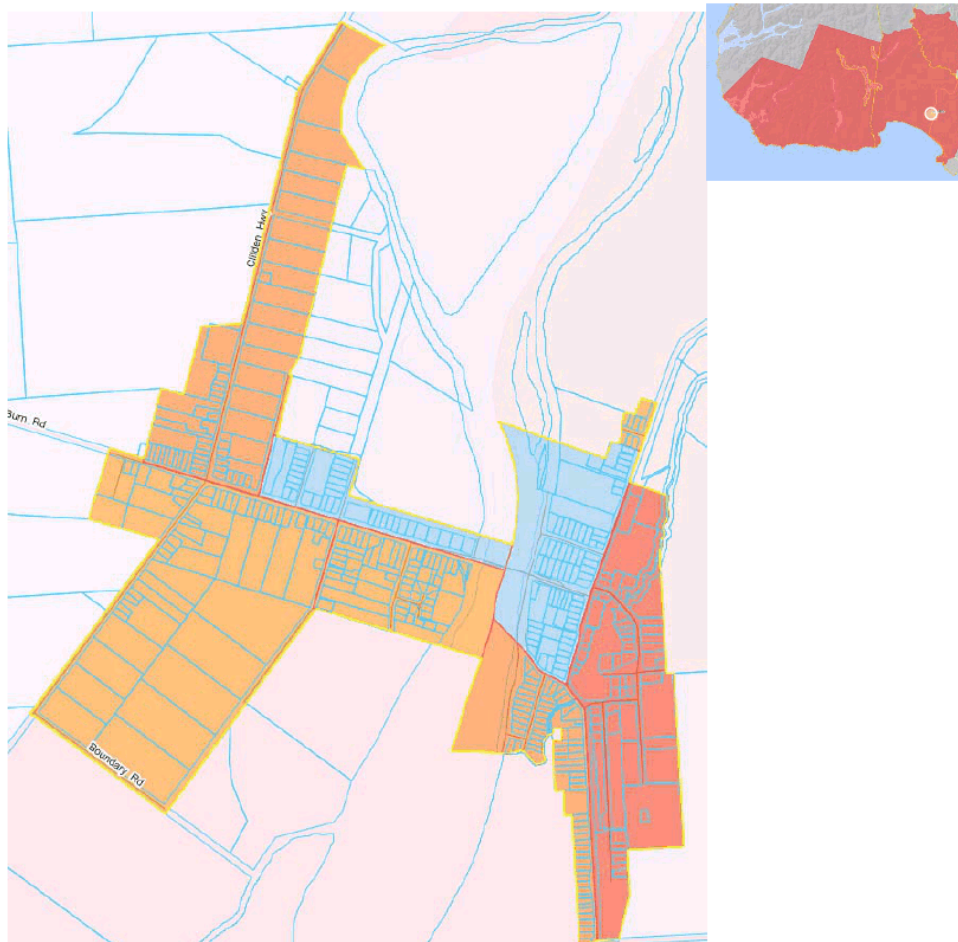
Share of rate arrears/rebates^{SDC} + accommodation supplement



Meshblock data – selected properties

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
3194800	51	0.17%	27	0.23%	\$30,427	\$2,608	8.57%	24	0.19%	23	\$66,648			8%	925% \$178k
3194900	51	0.17%	21	0.18%	\$35,959	\$2,871	7.98%	18	0.14%	18	\$50,883				100% \$117k
3194700	48	0.16%	18	0.16%	\$41,491	\$2,746	6.62%	20	0.16%	20	\$54,600				100% \$131k
3194200	78	0.26%	33	0.29%	\$42,929	\$2,672	6.22%	34	0.27%	27	\$86,501			24%	76% \$138k
3194400	84	0.28%	36	0.31%	\$45,142	\$2,620	5.80%	39	0.31%	36	\$103,011			23%	77% \$152k
3194500	84	0.28%	36	0.31%	\$49,789	\$2,614	5.25%	44	0.35%	38	\$112,230				100% \$154k
3194102	24	0.08%	9	0.08%	\$49,789	\$2,574	5.17%	8	0.06%	8	\$21,189				100% \$139k
3194600	78	0.26%	36	0.31%	\$67,271	\$2,618	3.89%	42	0.34%	0	\$112,166				
3194300	63	0.21%	33	0.29%	\$67,271	\$2,611	3.88%	32	0.26%	0	\$85,695				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



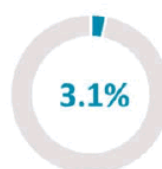
Te Waewae at a glance (rural area split over multiple Community Boards)

The Te Waewae area unit covers more than one community board (Tuatapere Te Waewae, Oraka Aparima and Fiordland) with the majority of the area unit contained within Tuatapere Te Waewae. The area unit data below is for the entire area unit as 2013 Census income data is not currently available for each community board area. The meshblock data and map that follows shows only the meshblocks within area unit that fit within relevant board area.

Te Waewae Area Unit data – selected properties

	Te Waewae		Southland	
Population	1,380		29,617	
Households	534		11,523	
Median Income	\$65,168		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,043	\$1,608	\$2,789	\$2,592
Rating Units	604	(1,419)	12,498	(20,328)
Total Rates	\$2.6m	(\$3.5m)	\$53.9m	(\$66.6m)

Rates as a proportion of income



Te Waewae



Southland

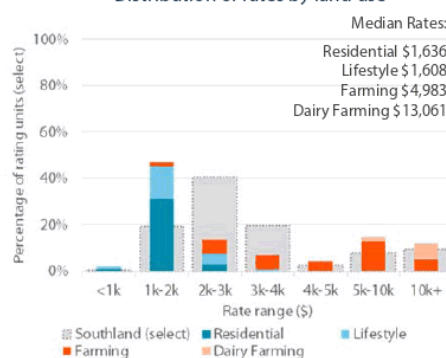
Meshblock rate/income range: 1.7%-20.6% (15 of 39 over 5%)

Distribution of household incomes

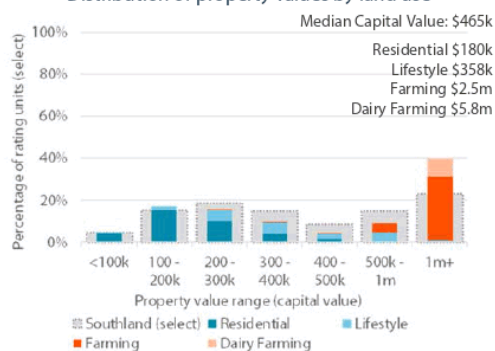
% low income households (earning under \$33,000): **20%** (105 households)



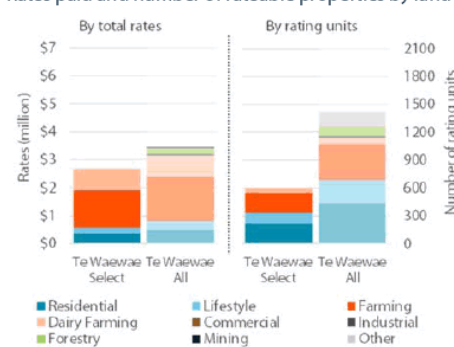
Distribution of rates by land use



Distribution of property values by land use



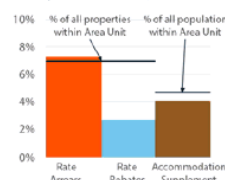
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^{SDC} + accommodation supplement



Meshblock data – selected properties

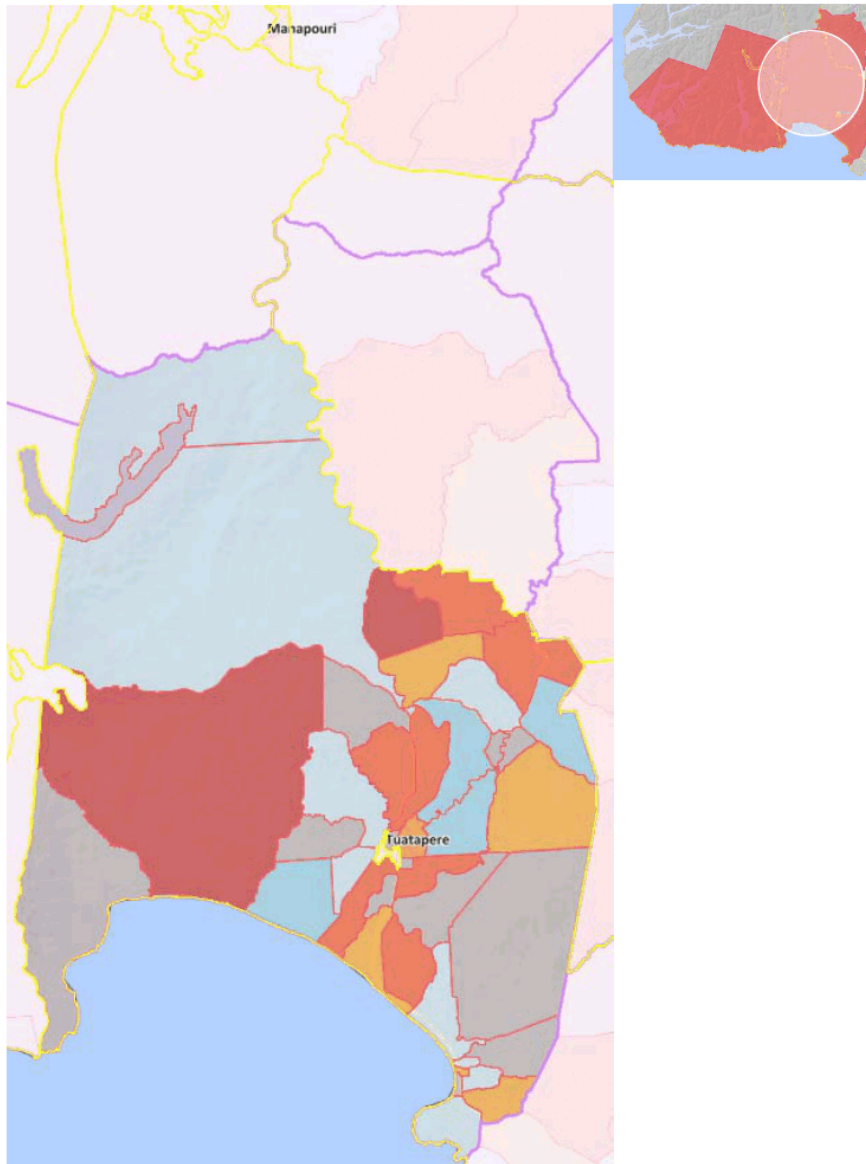
The meshblock data table and map below shows the information for the meshblocks contained within Te Waewae area unit within Tuatapere Te Waewae Community Board area. To view the meshblock and map data for this area unit within other board areas refer to the relevant community board section (Fiordland on page 50 and Oraka Aparima on page 77).

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Fam % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
Within Tuatapere Te Waewae Community Board area															
3191800	42	0.14%	12	0.10%	\$46,138	\$9,523	20.64%	10	0.08%	10	\$118,774	70% \$3.9m	30% \$6.7m		
3192400	24	0.08%	12	0.10%	\$30,427	\$4,316	14.19%	7	0.06%	6	\$46,691	72% \$4.9m	14% \$640k		14% \$117k
3192100	36	0.12%	12	0.10%	\$77,450	\$7,712	9.96%	9	0.07%	7	\$88,099	67% \$3.4m	22% \$9.3m		11% \$245k
3193200	30	0.10%	12	0.10%	\$28,546	\$2,762	9.68%	14	0.11%	11	\$53,826	43% \$2.9m	7% \$4.9m	14% \$198k	36% \$100k
3191900	30	0.10%	9	0.08%	\$103,230	\$9,851	9.54%	9	0.07%	7	\$96,146	89% \$4.7m		11% \$360k	
3192600	39	0.13%	15	0.13%	\$77,450	\$7,324	9.46%	10	0.08%	8	\$87,917	60% \$3.5m	30% \$6.8m	10% \$215k	% \$k
3188800	21	0.07%	6	0.05%	\$58,087	\$5,210	8.97%	4	0.03%	4	\$27,088	75% \$2.6m	25% \$5.7m	% \$k	% \$k
3192700	33	0.11%	12	0.10%	\$94,046	\$8,166	8.68%	10	0.08%	7	\$82,565	60% \$5.1m	10% \$5.2m	10% \$170k	20% \$220k
3188300	18	0.06%	6	0.05%	\$94,046	\$7,913	8.41%	4	0.03%	2	\$47,907	75% \$3.3m	25% \$13.6m		
3194101	18	0.06%	6	0.05%	\$57,202	\$3,915	6.84%	3	0.02%	2	\$10,685	33% \$1.9m		67% \$275k	
3192000	39	0.13%	12	0.10%	\$119,826	\$7,097	5.92%	12	0.10%	7	\$106,017	50% \$4.8m	17% \$8m	26% \$248k	17% \$104k
3188700	51	0.17%	18	0.16%	\$60,853	\$3,571	5.87%	12	0.10%	6	\$96,378	33% \$2.7m	25% \$109m	42% \$296k	
3189500	18	0.06%	6	0.05%	\$94,046	\$5,210	5.54%	4	0.03%	2	\$29,437	25% \$1.8m	50% \$5.6m	25% \$255k	
3189100	30	0.10%	15	0.13%	\$30,427	\$1,579	5.19%	32	0.26%	24	\$63,882		3% \$6.8m	3% \$255k	94% \$144k
3193900	39	0.13%	18	0.16%	\$94,046	\$4,775	5.08%	14	0.11%	7	\$80,373	71% \$3.4m	7% \$4.1m	22% \$413k	
3194000	36	0.12%	12	0.10%	\$35,959	\$1,784	4.96%	9	0.07%	4	\$27,449				
3193800	24	0.08%	12	0.10%	\$91,280	\$4,176	4.58%	10	0.08%	4	\$56,785				
3193300	39	0.13%	15	0.13%	\$30,427	\$1,326	4.36%	34	0.27%	10	\$72,095				
3193500	33	0.11%	9	0.08%	\$82,982	\$3,550	4.28%	18	0.14%	7	\$80,289				
3192300	60	0.20%	21	0.18%	\$85,748	\$2,950	3.44%	16	0.13%	7	\$130,367				
3189600	30	0.10%	15	0.13%	\$55,321	\$1,824	3.30%	18	0.14%	4	\$54,733				
3189200	18	0.06%	6	0.05%	\$82,982	\$2,741	3.30%	4	0.03%	1	\$11,378				
3192800	21	0.07%	9	0.08%	\$71,918	\$2,356	3.28%	12	0.10%	4	\$41,842				
3192200	51	0.17%	24	0.21%	\$94,046	\$3,022	3.21%	22	0.18%	9	\$129,430				
3188900	24	0.08%	9	0.08%	\$71,918	\$2,306	3.21%	6	0.05%	2	\$24,533				
3189000	24	0.08%	12	0.10%	\$60,853	\$1,607	2.64%	16	0.13%	0	\$27,038				
3191701	27	0.09%	12	0.10%	\$94,046	\$1,813	1.93%	18	0.14%	3	\$71,517				
3193100	18	0.06%	9	0.08%	\$119,826	\$2,075	1.73%	9	0.07%	1	\$34,243				
3188400	27	0.09%	9	0.08%	...C	\$4,637	...C	11	0.09%	...C	\$44,090				
3188600	12	0.04%	6	0.05%	...C	\$2,519	...C	6	0.05%	...C	\$37,841				
3193000	24	0.08%	6	0.05%	...C	\$7,155	...C	4	0.03%	...C	\$30,228				
3193600	15	0.05%	6	0.05%	...C	\$2,075	...C	5	0.04%	...C	\$28,644				
3192500	3	0.01%	3	0.03%	...C	\$8,095	...C	2	0.02%	...C	\$16,191				
3193700	12	0.04%	3	0.03%	...C	\$1,758	...C	3	0.02%	...C	\$13,259				

Assessing Southland rates affordability

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
3189400	6	0.02%	3	0.03%	...C	\$2,798	...C	3	0.02%	...C	\$11,959				
3188500	6	0.02%	3	0.03%	...C	\$2,931	...C	3	0.02%	...C	\$7,215				
3189300	6	0.02%	0	0.00%	...C	\$1,628	...C	1	0.01%	...C	\$1,628				
3192900	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				
3193400	3	0.01%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



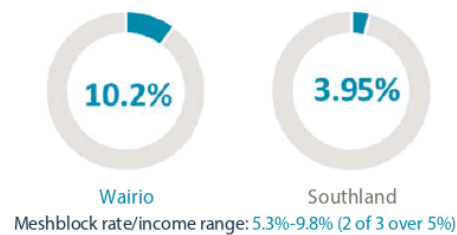
Wairio at a glance (rural area split over multiple Community Boards)

The Wairio area unit covers more than one community board (Wallace Takitimu, Tuatapere Te Waewae, Fiordland and Northern) with the majority of the area unit contained within Wallace Takitimu. The area unit data below is for the entire area unit as 2013 Census income data is not currently available for each community board area. The meshblock data and map that follows shows only the meshblocks within area unit that fit within relevant board area.

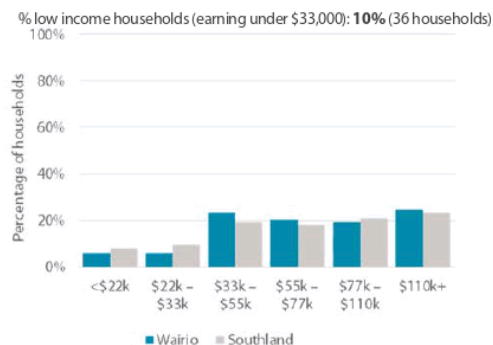
Wairio Area Unit data – selected properties

	Wairio		Southland	
Population	942		29,617	
Households	354		11,523	
Median Income	\$71,364		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$7,275	\$3,186	\$2,789	\$2,592
Rating Units	243	(460)	12,498	(20,328)
Total Rates	\$2.3m	(\$2.8m)	\$53.9m	(\$66.6m)

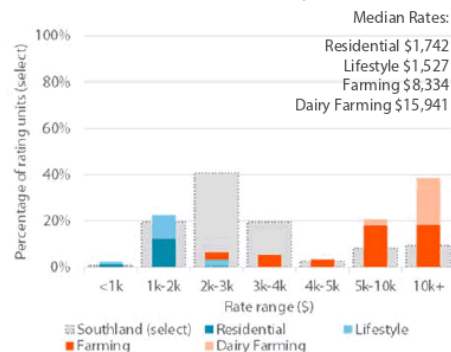
Rates as a proportion of income



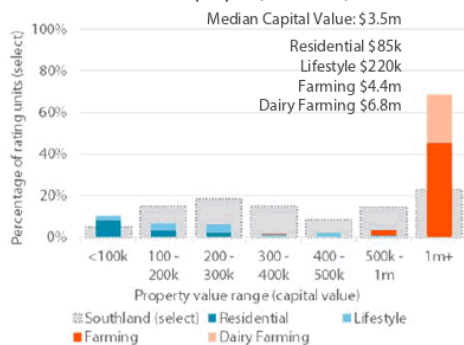
Distribution of household incomes



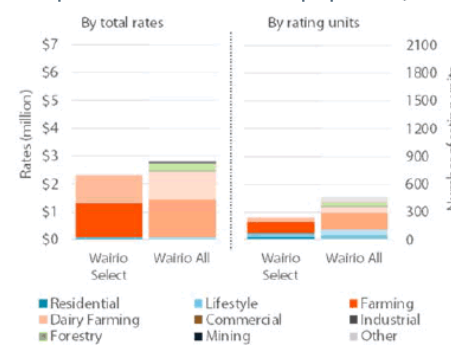
Distribution of rates by land use



Distribution of property values by land use



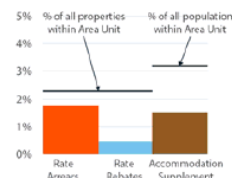
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^(SDQ) + accommodation supplement

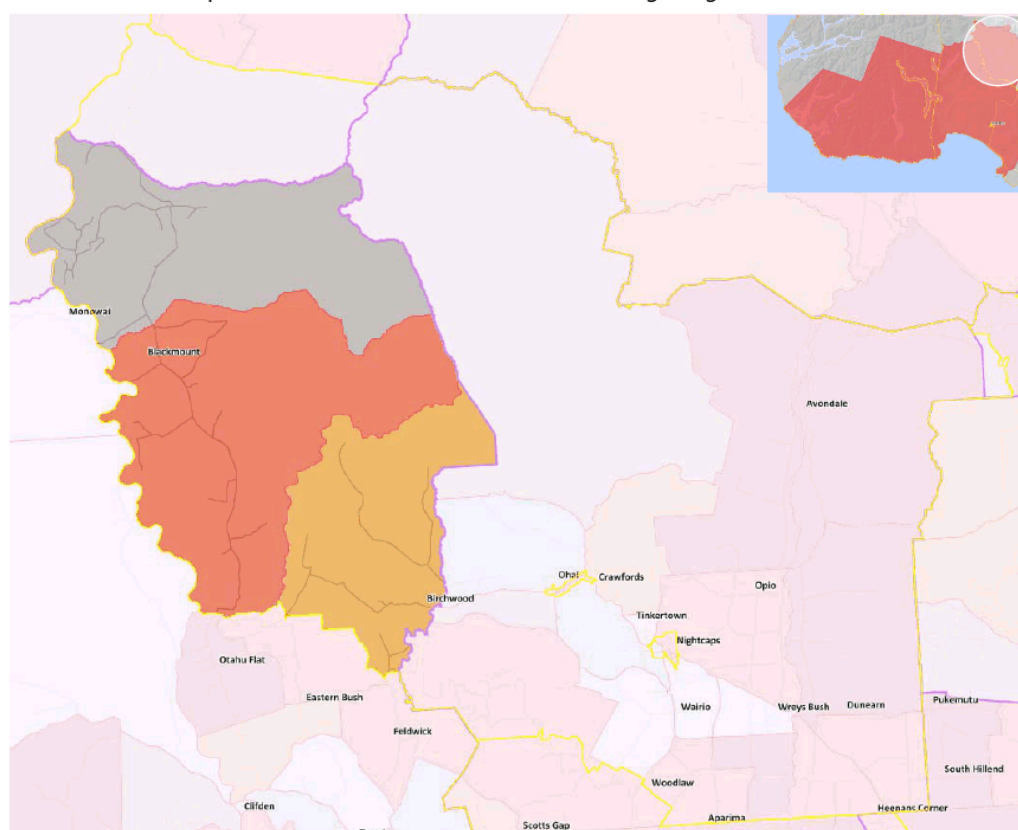


Meshblock data – selected properties

The meshblock data table and map below shows the information for the meshblocks contained within Wairoa area unit within Tuatapere Te Waewae Community Board area. To view the meshblock and map data for this area unit within other board areas refer to the relevant community board section (Wallace Takitimu on page 148, Northern on page 66 and Fiordland on page 52).

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
Within Tuatapere Te Waewae Community Board area															
3182000	60	0.20%	24	0.21%	\$85,748	\$8,384	9.78%	15	0.12%	10	\$116,236	80% \$4.9m		13% \$171k	7% \$145k
3182100	27	0.09%	9	0.08%	\$116,175	\$6,186	5.32%	5	0.04%	3	\$54,303	100% \$5.8m			
3181900	9	0.03%	6	0.05%	...C	\$9,721	...C	4	0.03%	...C	\$38,375				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)

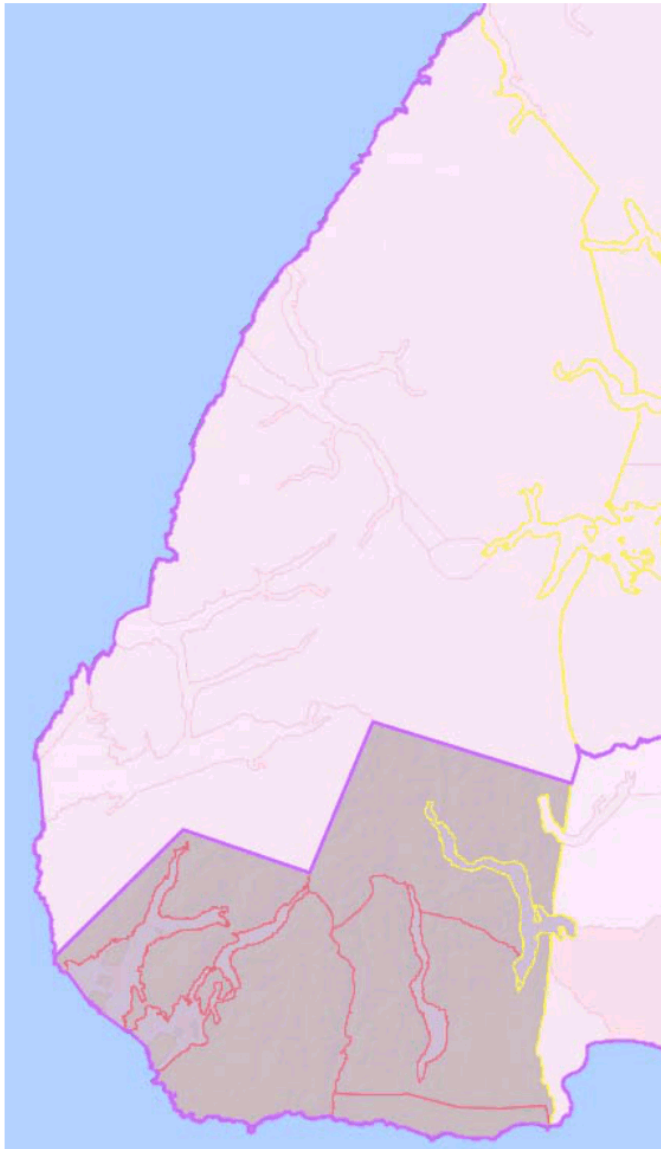


Fiordland (no income data)

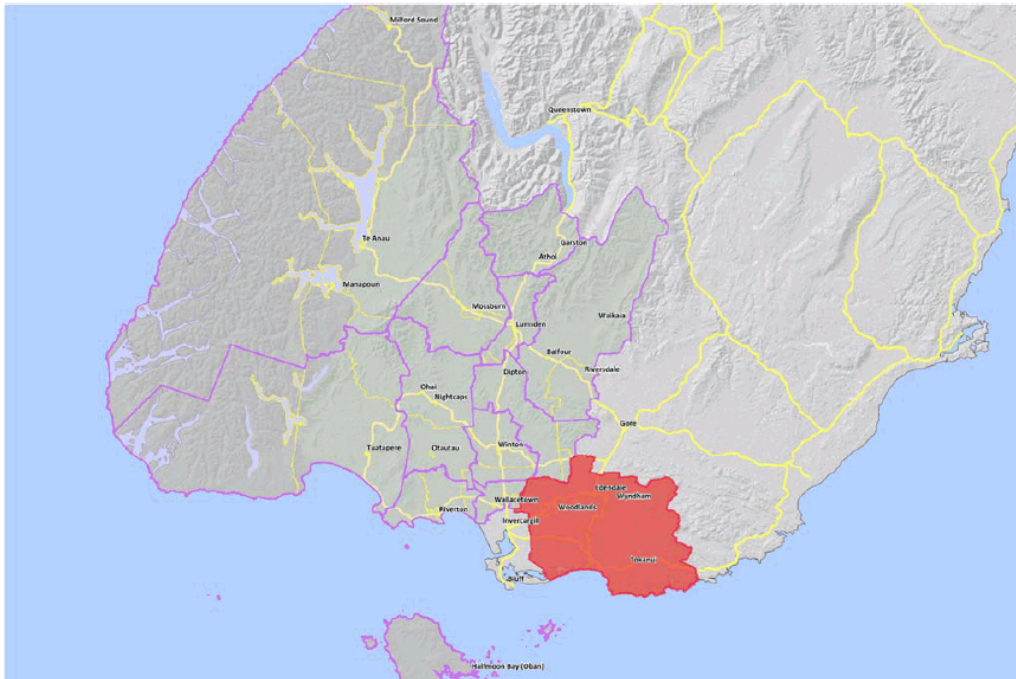
The Fiordland area unit covers more than one community board (Tuatapere Te Waewae and Fiordland) with the majority of the area unit contained within the Fiordland Community Board area.

Fiordland Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)

As there is no income data for this area unit, the rates affordability analysis cannot be completed.



Waihopa Toetoe Community Board



The Waihopa Toetoe Community Board area contains six area units and 153 meshblocks. The area units that are either wholly or partly within community board area include:

- Edendale (whole) – the township urban area
- Wyndham (whole) – the township urban area
- Woodlands (whole) – the small area in the west of the board area containing the Woodlands township urban area and surrounding the rural area
- Waituna (whole) – the rural area in the south western part of the board area and including the township urban area of Gorge Road
- Toetoes (whole) – the rural area in the eastern part of the board area and including the townships of Tokanui, Fortrose, Curio Bay and Waikawa
- Dacre (part) – the rural area in the north western part of the board area

Edendale at a glance (urban area)

The Edendale area unit is fully contained within the Waihopai Toetoe Community Board.

Edendale Area Unit data – selected properties

	Edendale		Southland	
Population	555		29,617	
Households	231		11,523	
Median Income	\$74,241		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,697	\$2,630	\$2,789	\$2,592
Rating Units	253	(341)	12,498	(20,328)
Total Rates	\$0.7m	(\$1.3m)	\$53.9m	(\$66.6m)

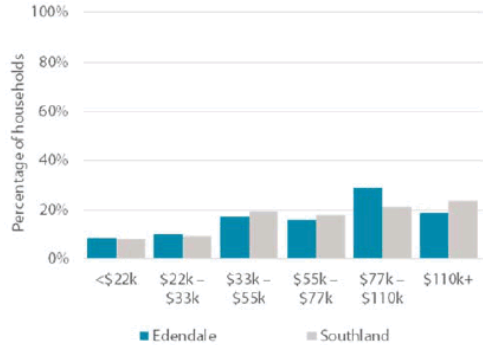
Rates as a proportion of income



Meshblock rate/income range: 2.8%-7.4% (2 of 10 over 5%)

Distribution of household incomes

% low income households (earning under \$33,000): 17% (39 households)



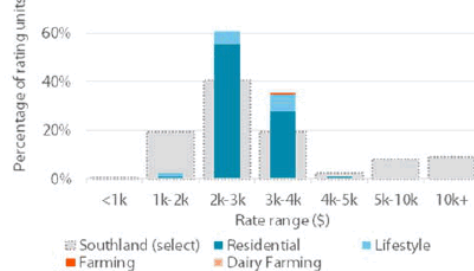
Distribution of rates by land use

Median Rates:

Residential \$2,656

Lifestyle \$3,000

Farming \$3,084



Distribution of property values by land use

Median Capital Value: \$220k

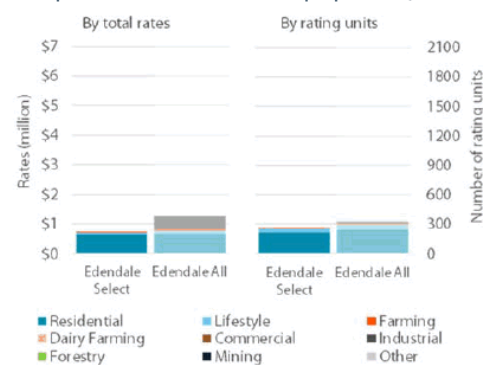
Residential \$205k

Lifestyle \$428k

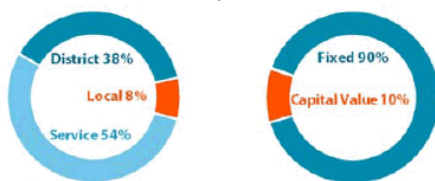
Farming \$550k



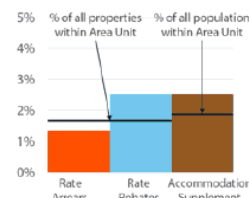
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



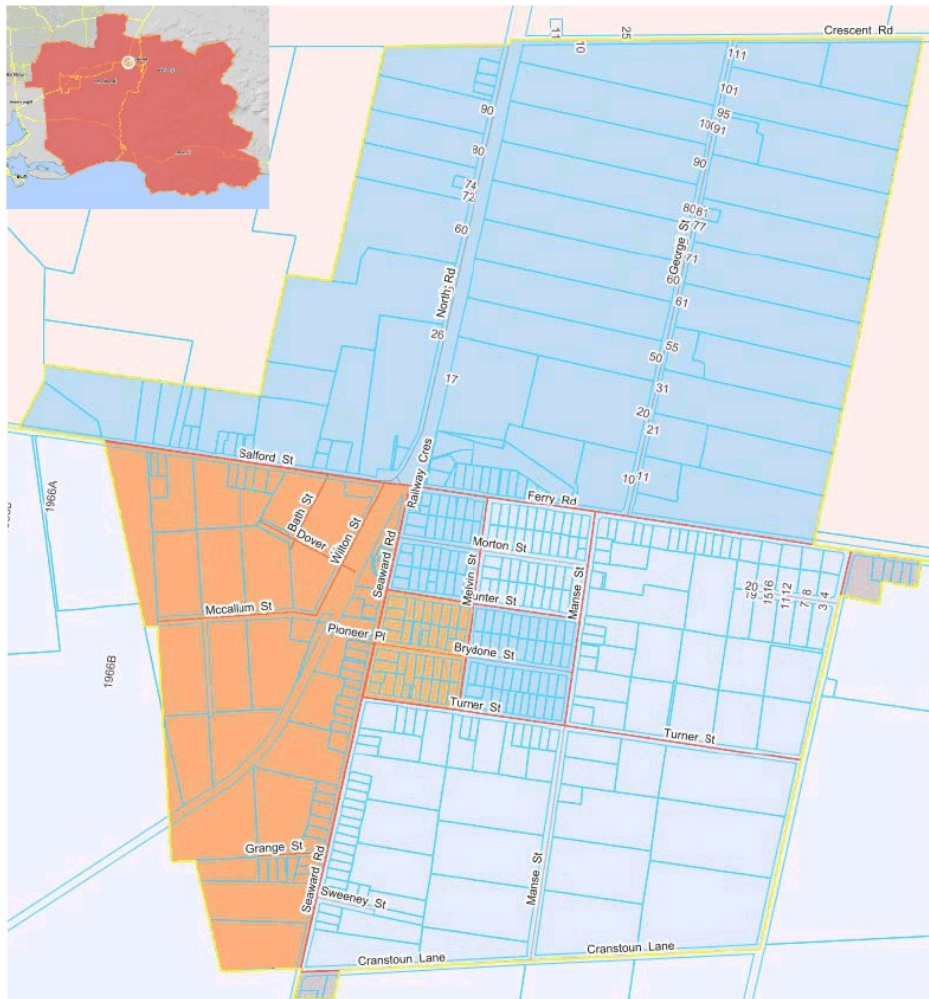
Share of rate arrears/rebates^{SDC} + accommodation supplement



Meshblock data – selected properties

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res. % LU Av CV
3165700	81	0.27%	36	0.31%	\$40,163	\$2,987	7.44%	33	0.26%	32	\$102,075			12% \$444k	88% \$218k
3166000	45	0.15%	21	0.18%	\$57,202	\$3,026	5.29%	24	0.19%	13	\$70,780				100% \$197k
3165800	57	0.19%	18	0.16%	\$63,619	\$2,693	4.23%	21	0.17%	7	\$59,925				
3166100	72	0.24%	36	0.31%	\$68,266	\$2,605	3.82%	43	0.34%	1	\$116,999				
3165600	75	0.25%	30	0.26%	\$74,684	\$2,642	3.54%	30	0.24%	1	\$83,904				
3166200	72	0.24%	27	0.23%	\$88,514	\$3,007	3.40%	36	0.29%	0	\$109,146				
3165900	60	0.20%	24	0.21%	\$94,046	\$2,753	2.93%	23	0.18%	0	\$68,480				
3166300	78	0.26%	36	0.31%	\$94,046	\$2,656	2.82%	37	0.30%	0	\$103,865				
3164801	12	0.04%	3	0.03%	...C	\$2,653	...C	4	0.03%	...C	\$11,088				
3164802	6	0.02%	3	0.03%	...C	\$1,653	...C	2	0.02%	...C	\$3,306				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



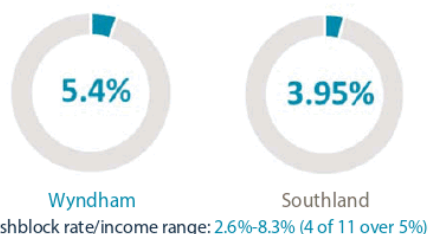
Wyndham at a glance (urban area)

The Wyndham area unit is fully contained within the Waihopai Toetoe Community Board.

Wyndham Area Unit data – selected properties

	Wyndham		Southland	
Population	534		29,617	
Households	222		11,523	
Median Income	\$58,087		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$3,108	\$2,565	\$2,789	\$2,592
Rating Units	232	(369)	12,498	(20,328)
Total Rates	\$0.7m	(\$0.9m)	\$53.9m	(\$66.6m)

Rates as a proportion of income

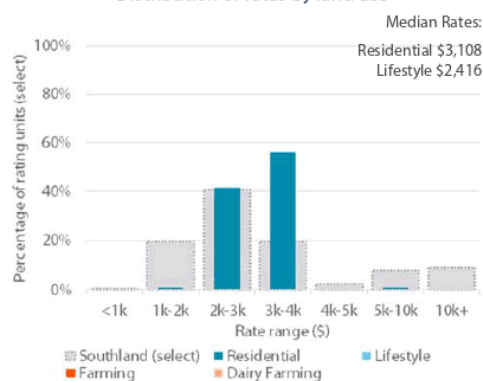


Distribution of household incomes

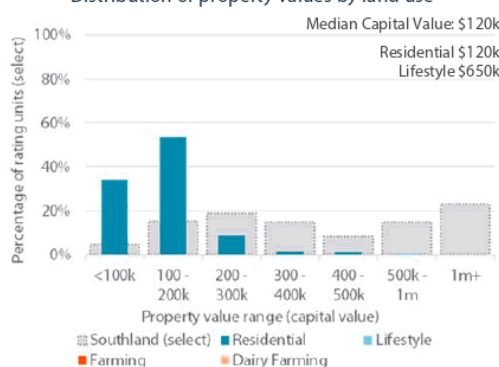
% low income households (earning under \$33,000): **28%** (63 households)



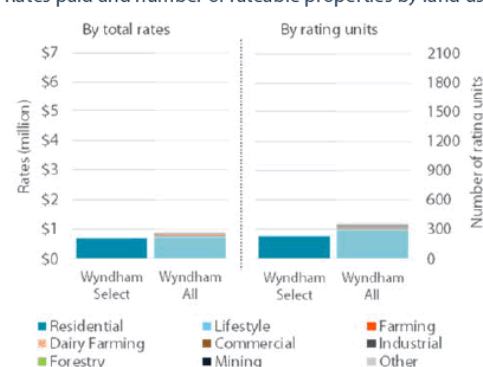
Distribution of rates by land use



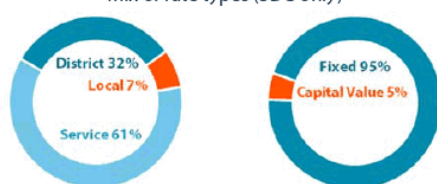
Distribution of property values by land use



Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



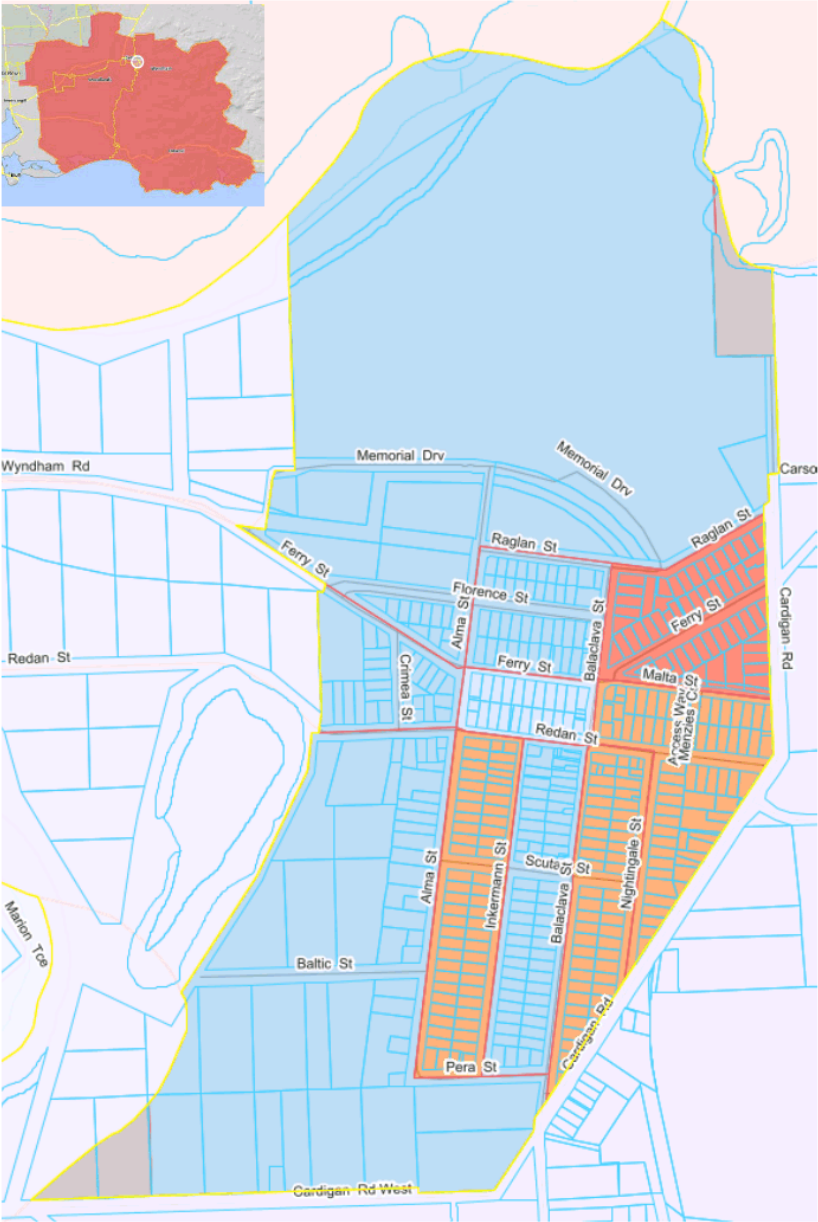
Share of rate arrears/rebates^{SDC} + accommodation supplement



Meshblock data – selected properties

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
3098500	75	0.25%	33	0.29%	\$37,397	\$3,103	8.30%	36	0.29%	36	\$107,713				100% \$149k
3098700	57	0.19%	21	0.18%	\$35,959	\$2,818	7.84%	22	0.18%	22	\$62,973				100% \$107k
3098400	96	0.32%	27	0.23%	\$43,372	\$3,121	7.20%	32	0.26%	32	\$94,413				100% \$137k
3098600	54	0.18%	27	0.23%	\$46,138	\$3,131	6.79%	24	0.19%	23	\$78,421				100% \$129k
3098800	66	0.22%	24	0.21%	\$69,152	\$3,187	4.61%	30	0.24%	2	\$90,219				
3098200	60	0.20%	33	0.29%	\$60,853	\$2,552	4.19%	37	0.30%	17	\$106,530				
3098103	36	0.12%	18	0.16%	\$82,982	\$3,239	3.90%	18	0.14%	1	\$60,598				
3098001	27	0.09%	9	0.08%	\$68,266	\$2,560	3.75%	14	0.11%	1	\$36,915				
3097901	27	0.09%	12	0.10%	\$71,918	\$2,565	3.57%	9	0.07%	0	\$23,865				
3098300	30	0.10%	9	0.08%	\$119,826	\$3,145	2.62%	10	0.08%	0	\$30,606				
3054602	0	0.00%	0	0.00%	...C	...C	...C	0	0.00%	...C	\$0				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



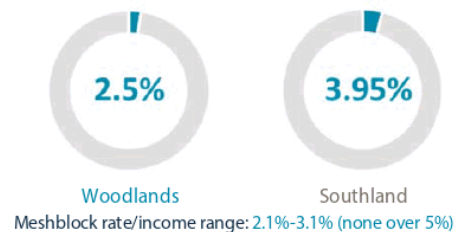
Woodlands at a glance (urban and rural area)

The Woodlands area unit is fully contained within the Waihopai Toetoe Community Board.

Woodlands Area Unit data – selected properties

	Woodlands		Southland	
Population	264		29,617	
Households	111		11,523	
Median Income	\$71,918		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$1,769	\$1,712	\$2,789	\$2,592
Rating Units	111	(168)	12,498	(20,328)
Total Rates	\$310k	(\$372k)	\$53.9m	(\$66.6m)

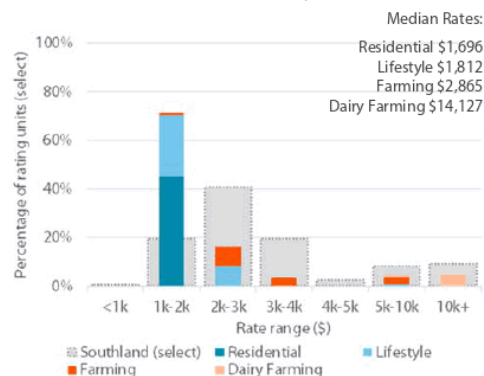
Rates as a proportion of income



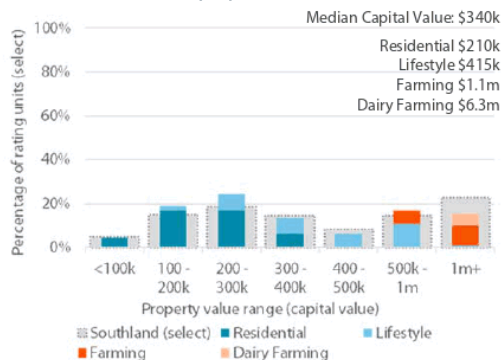
Distribution of household incomes



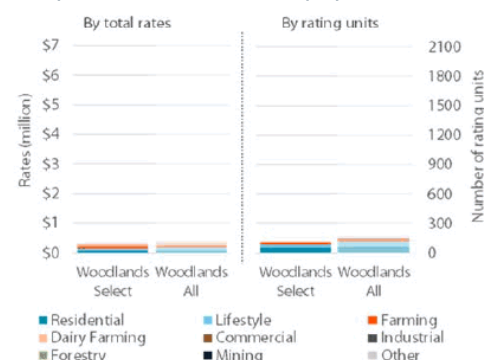
Distribution of rates by land use



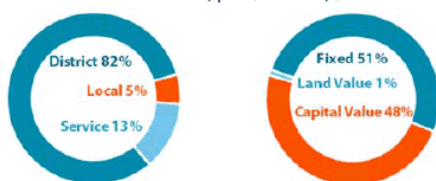
Distribution of property values by land use



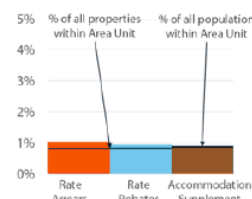
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



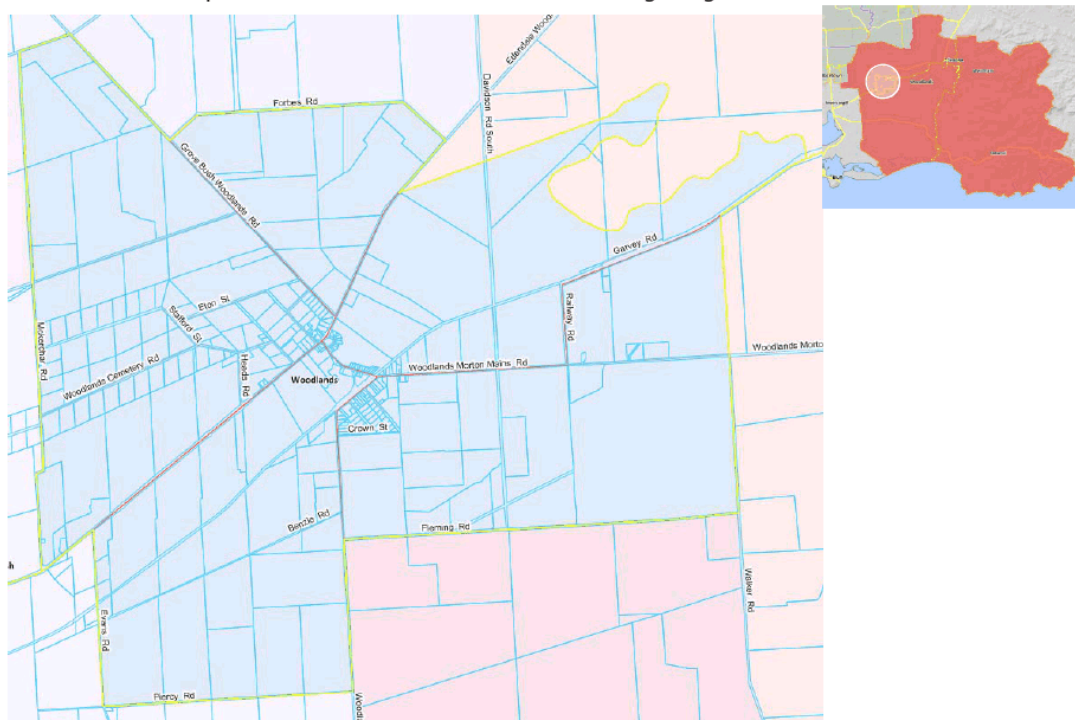
Share of rate arrears/rebates^(SDC) + accommodation supplement



Meshblock data – selected properties

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
3089900	18	0.06%	6	0.05%	\$110,643	\$3,462	3.13%	5	0.04%	2	\$28,839				
3092700	78	0.26%	33	0.29%	\$60,853	\$1,788	2.94%	35	0.28%	3	\$77,618				
3090000	63	0.21%	27	0.23%	\$60,853	\$1,746	2.87%	26	0.21%	2	\$79,100				
3163900	69	0.23%	27	0.23%	\$82,982	\$1,778	2.14%	27	0.22%	3	\$65,854				
3162800	36	0.12%	15	0.13%	\$82,982	\$1,754	2.11%	18	0.14%	2	\$58,215				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



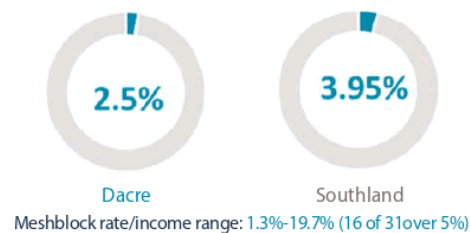
Dacre at a glance (rural area split over multiple Community Boards)

The Dacre area unit covers more than one community board (Waihopa Toetoe and Oreti) with the majority of the area unit contained within Waihopa Toetoe. The area unit data below is for the entire area unit as 2013 Census income data is not currently available for each community board area. The meshblock data and map that follows shows only the meshblocks within area unit that fit within relevant board area.

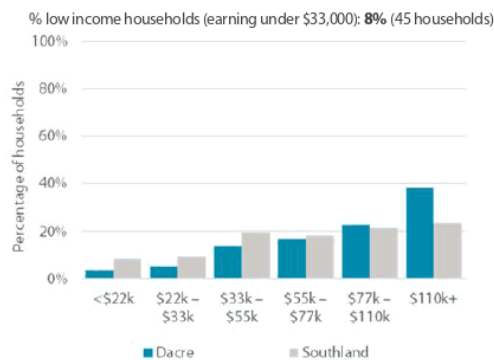
Dacre Area Unit data – selected properties

	Dacre		Southland	
Population	1,617		29,617	
Households	579		11,523	
Median Income	\$93,161		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,356	\$2,101	\$2,789	\$2,592
Rating Units	504	(680)	12,498	(20,328)
Total Rates	\$2.7m	(\$3.0m)	\$53.9m	(\$66.6m)

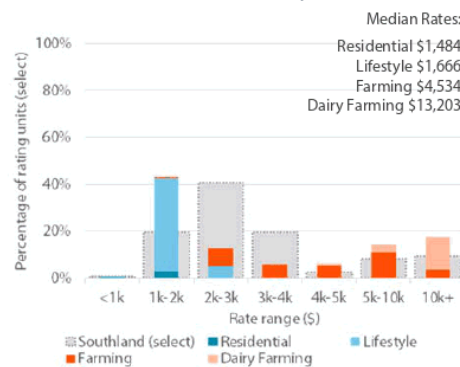
Rates as a proportion of income



Distribution of household incomes



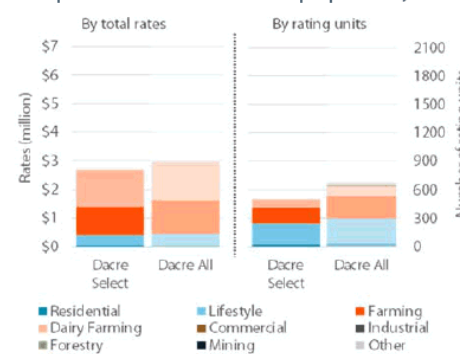
Distribution of rates by land use



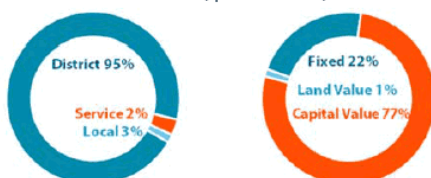
Distribution of property values by land use



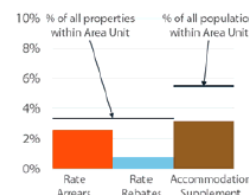
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^(SDC) + accommodation supplement

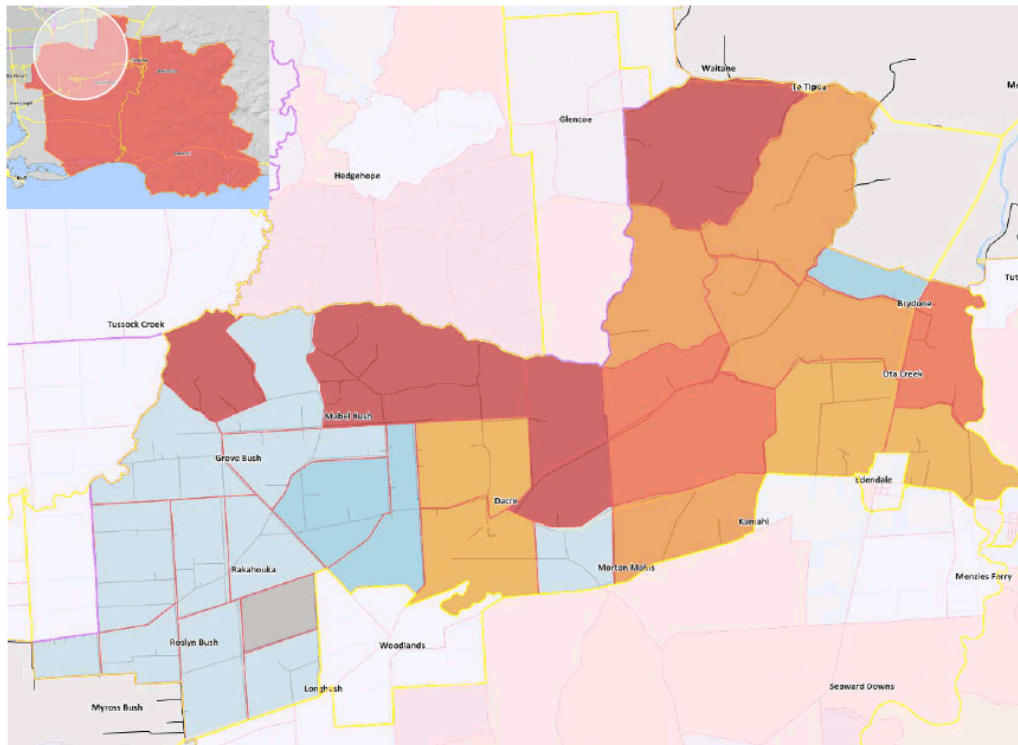


Meshblock data – selected properties

The meshblock data table and the map below shows the information for the meshblocks contained within Dacre area unit within Waihopai Toetoe Community Board area. To view the meshblock and map data for this area unit within Oreti Community Board area refer to page 105.

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
Within Waihopai Toetoe Community Board area															
3089200	54	0.18%	18	0.16%	\$57,202	\$11,267	19.70%	15	0.12%	13	\$176,940	60% \$3.9m	33% \$9.8m	7% \$580k	
3089000	21	0.07%	6	0.05%	\$71,918	\$12,979	18.05%	5	0.04%	4	\$59,498	20% \$1.2m	80% \$6.4m		
3087302	33	0.11%	12	0.10%	\$49,789	\$8,033	16.13%	13	0.10%	13	\$116,187	92% \$4.4m	8% \$8.9m		
3089700	21	0.07%	9	0.08%	\$94,046	\$14,699	15.63%	6	0.05%	5	\$79,132	50% \$3.9m	50% \$9.1m		
3089800	24	0.08%	6	0.05%	\$49,789	\$6,944	13.95%	4	0.03%	3	\$29,936		75% \$4m	25% \$473k	
3087900	27	0.09%	6	0.05%	\$119,826	\$11,671	9.74%	5	0.04%	4	\$58,977	40% \$6.4m	40% \$8m		20% \$360k
3087804	30	0.10%	15	0.13%	\$97,697	\$9,079	9.29%	11	0.09%	6	\$93,263	36% \$3m	36% \$6.2m	28% \$562k	
3088000	45	0.15%	15	0.13%	\$138,303	\$11,931	8.63%	11	0.09%	7	\$114,346	55% \$6.4m	27% \$6.1mk	18% \$463k	
3087400	42	0.14%	15	0.13%	\$102,344	\$7,783	7.61%	7	0.06%	6	\$69,263	71% \$3.6m	29% \$9m		
3088300	30	0.10%	12	0.10%	\$138,303	\$8,642	6.25%	10	0.08%	7	\$83,263	40% \$4.2m	40% \$5.2m	20% \$466k	
3087700	93	0.31%	33	0.29%	\$63,619	\$3,951	6.21%	24	0.19%	13	\$180,769	29% \$1.5m	29% \$7.5m	17% \$4605k	25% \$117k
3087600	24	0.08%	9	0.08%	\$94,046	\$5,812	6.18%	7	0.06%	4	\$41,995	86% \$3.55m		14% \$495k	
3089600	39	0.13%	15	0.13%	\$60,853	\$3,524	5.79%	9	0.07%	6	\$63,121	11% \$1.7m	56% \$5.2m	33% \$338k	
3090100	60	0.20%	18	0.16%	\$119,826	\$6,857	5.72%	10	0.08%	6	\$97,487	30% \$3.1m	50% \$6.9m	20% \$415k	
3088100	72	0.24%	24	0.21%	\$71,918	\$3,820	5.31%	18	0.14%	10	\$144,792	17% \$2.3m	39% \$7m	39% \$606k	5% \$175k
3088200	30	0.10%	9	0.08%	\$119,826	\$6,167	5.15%	11	0.09%	6	\$62,194	46% \$3.1m	27% \$3.1m	27% \$450k	
3087504	24	0.08%	9	0.08%	\$94,046	\$4,358	4.63%	8	0.06%	3	\$38,410				
3089400	51	0.17%	18	0.16%	\$94,046	\$4,091	4.35%	15	0.12%	5	\$94,798				
3089500	36	0.12%	12	0.10%	\$119,826	\$4,483	3.74%	10	0.08%	4	\$67,739				
3092000	60	0.20%	21	0.18%	\$63,619	\$2,215	3.48%	19	0.15%	5	\$97,557				
3092100	66	0.22%	27	0.23%	\$94,046	\$2,241	2.38%	22	0.18%	3	\$80,141				
3092300	36	0.12%	12	0.10%	\$94,046	\$2,073	2.20%	11	0.09%	2	\$44,759				
3092200	45	0.15%	15	0.13%	\$94,046	\$2,018	2.15%	17	0.14%	3	\$62,444				
3092800	36	0.12%	12	0.10%	\$94,046	\$1,910	2.03%	15	0.12%	4	\$65,709				
3091201	102	0.34%	42	0.37%	\$85,748	\$1,629	1.90%	36	0.29%	1	\$69,451				
3089100	48	0.16%	18	0.16%	\$105,110	\$1,940	1.85%	15	0.12%	3	\$59,062				
3089300	36	0.12%	15	0.13%	\$152,134	\$2,489	1.64%	10	0.08%	1	\$44,570				
3090200	42	0.14%	12	0.10%	\$77,450	\$1,217	1.57%	9	0.07%	2	\$24,783				
3092401	90	0.30%	30	0.26%	\$113,741	\$1,726	1.52%	36	0.29%	2	\$80,170				
3092500	99	0.33%	33	0.29%	\$129,120	\$1,701	1.32%	33	0.26%	3	\$91,514				
3092600	9	0.03%	3	0.03%	...C	\$6,825	...C	4	0.03%	...C	\$26,374				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



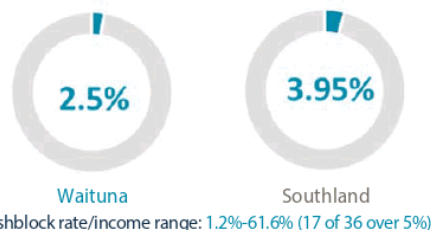
Waituna at a glance (rural area)

The Waituna area unit is fully contained within the Waihopai Toetoe Community Board.

Waituna Area Unit data – selected properties

	Waituna		Southland	
Population	1,683		29,617	
Households	612		11,523	
Median Income	\$85,416		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,808		\$2,789	\$2,592
Rating Units	466	(761)	12,498	(20,328)
Total Rates	\$3m	(\$3.5m)	\$53.9m	(\$66.6m)

Rates as a proportion of income

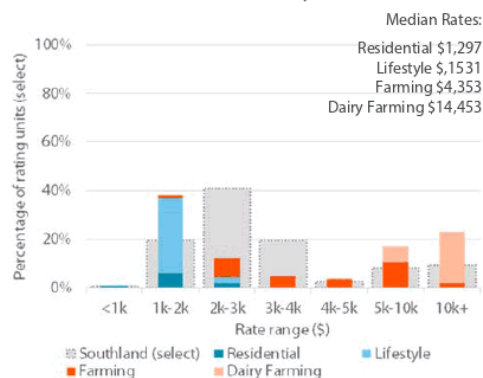


Distribution of household incomes

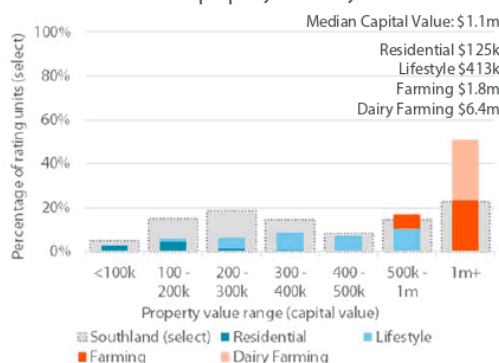
% low income households (earning under \$33,000): **7%** (42 households)



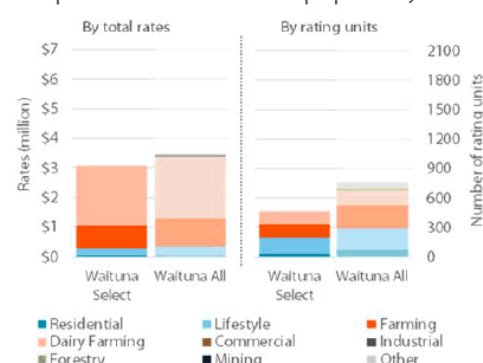
Distribution of rates by land use



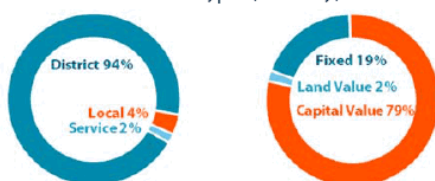
Distribution of property values by land use



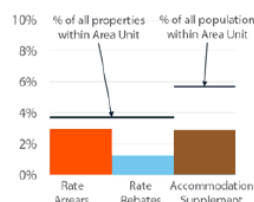
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



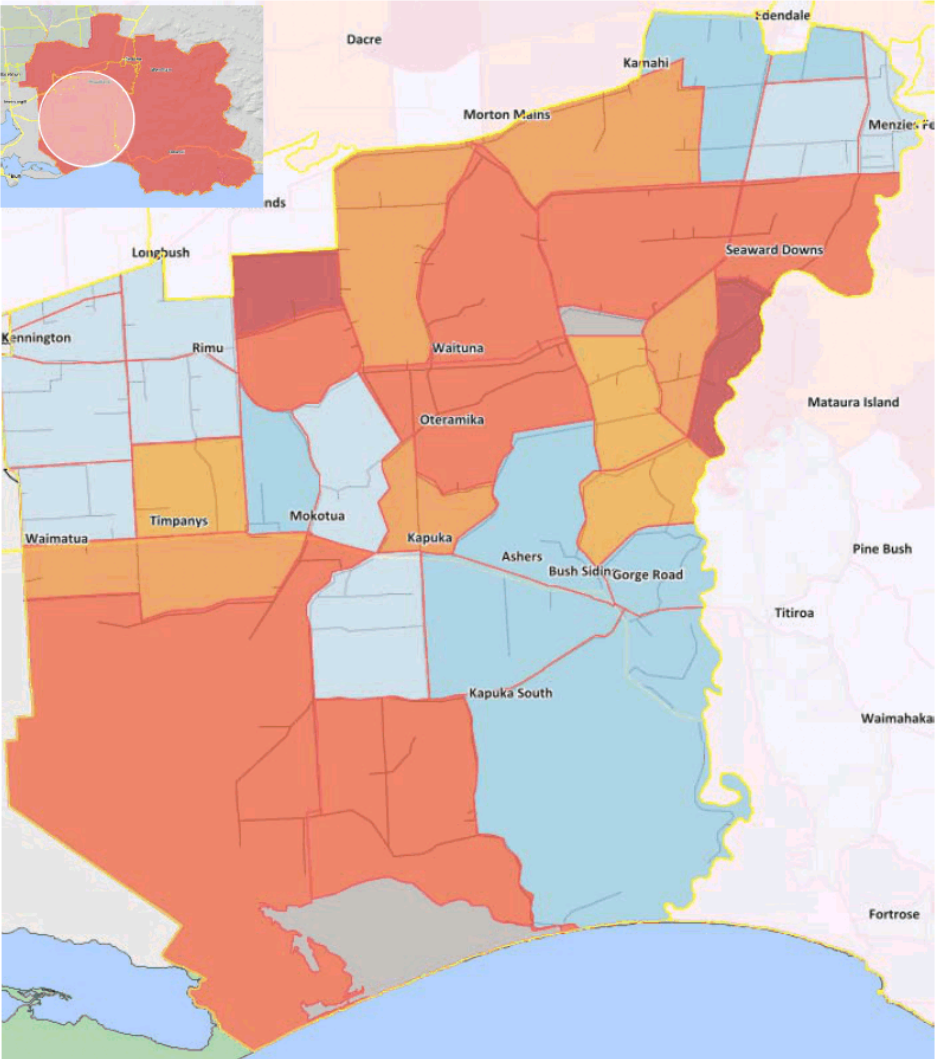
Share of rate arrears/rebates^{SDC} + accommodation supplement



Meshblock data – selected properties

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
3164000	33	0.11%	12	0.10%	\$30,427	\$18,735	61.57%	4	0.03%	4	\$66,399	75% \$10.1m	25% \$530k		
3165300	18	0.06%	6	0.05%	\$57,202	\$15,774	27.58%	5	0.04%	5	\$72,761	20% \$2.7m	80% \$7.1m		
3164100	27	0.09%	12	0.10%	\$77,450	\$9,155	11.82%	7	0.06%	6	\$64,700	29% \$4.5m	57% \$5.6m	14% \$485k	
3164600	78	0.26%	27	0.23%	\$88,514	\$8,837	9.98%	16	0.13%	9	\$153,388	19% \$6.6m	38% \$7.7m	38% \$452k	5% \$135k
3164300	69	0.23%	27	0.23%	\$85,748	\$8,555	9.98%	13	0.10%	8	\$131,245	15% \$4.8m	46% \$8.5m	31% \$379k	8% \$150k
3162601	36	0.12%	15	0.13%	\$138,303	\$13,566	9.81%	4	0.03%	3	\$49,177	75% \$7.6m	25% \$435k		
3162301	102	0.34%	36	0.31%	\$88,514	\$7,866	8.89%	26	0.21%	15	\$215,794	27% \$3.4m	38% \$6.7m	35% \$313k	
3165100	54	0.18%	21	0.18%	\$82,982	\$7,319	8.82%	17	0.14%	10	\$153,567	24% \$2.9m	41% \$6.5m	29% \$438k	6% \$145k
3163400	66	0.22%	21	0.18%	\$94,046	\$7,602	8.08%	14	0.11%	9	\$147,247	29% \$3.5m	42% \$8.4m	29% \$374k	
3164200	54	0.18%	21	0.18%	\$82,982	\$6,537	7.88%	18	0.14%	10	\$143,278	33% \$2.6m	39% \$7.2m	17% \$335k	11% \$180k
3165400	24	0.08%	9	0.08%	\$138,303	\$10,097	7.30%	4	0.03%	3	\$40,782	100% \$4.3m			
3162200	57	0.19%	21	0.18%	\$80,216	\$5,767	7.19%	13	0.10%	9	\$121,274	31% \$2.8m	46% \$6.4m	15% \$226k	8% \$103k
3164500	72	0.24%	21	0.18%	\$124,473	\$7,554	6.07%	16	0.13%	9	\$146,655	38% \$5.2m	31% \$7.1m	19% \$265k	13% \$149k
3163500	24	0.08%	12	0.10%	\$85,748	\$5,156	6.01%	6	0.05%	3	\$34,620	50% \$2.2m	33% \$4.3m	17% \$295k	
3165500	30	0.10%	12	0.10%	\$116,175	\$6,968	6.00%	6	0.05%	5	\$53,733	17% \$3.1m	67% \$5.2m	17% \$75k	
3163100	30	0.10%	12	0.10%	\$119,826	\$6,988	5.83%	10	0.08%	7	\$89,301	40% \$2.2m	50% \$5.5m	10% \$615k	
3163700	30	0.10%	9	0.08%	\$62,734	\$3,635	5.79%	7	0.06%	4	\$48,082	43% \$1.9m	29% \$7.1m	29% \$360k	
3162700	84	0.28%	24	0.21%	\$94,046	\$4,658	4.95%	20	0.16%	10	\$125,666				
3164803	24	0.08%	9	0.08%	\$71,918	\$3,366	4.68%	5	0.04%	2	\$32,544				
3162500	60	0.20%	21	0.18%	\$80,216	\$3,581	4.46%	13	0.10%	6	\$119,666				
3163800	45	0.15%	15	0.13%	\$60,853	\$2,284	3.75%	15	0.12%	4	\$63,515				
3164400	45	0.15%	18	0.16%	\$85,748	\$3,186	3.71%	19	0.15%	8	\$138,372				
3163200	30	0.10%	9	0.08%	\$138,303	\$4,951	3.58%	9	0.07%	4	\$61,263				
3163600	57	0.19%	24	0.21%	\$79,331	\$2,795	3.52%	21	0.17%	8	\$138,534				
3163300	54	0.18%	18	0.16%	\$57,202	\$1,713	2.99%	11	0.09%	5	\$66,147				
3162400	48	0.16%	15	0.13%	\$102,344	\$3,032	2.96%	12	0.10%	4	\$80,144				
3161901	39	0.13%	15	0.13%	\$58,087	\$1,612	2.77%	16	0.13%	3	\$40,639				
3162100	54	0.18%	21	0.18%	\$82,982	\$2,150	2.59%	22	0.18%	3	\$55,607				
3162900	60	0.20%	24	0.21%	\$71,918	\$1,571	2.18%	23	0.18%	3	\$58,329				
3164900	39	0.13%	18	0.16%	\$94,046	\$2,042	2.17%	11	0.09%	2	\$54,909				
3161802	30	0.10%	12	0.10%	\$94,046	\$1,708	1.82%	12	0.10%	0	\$20,481				
3162000	117	0.40%	42	0.37%	\$105,110	\$1,702	1.62%	37	0.30%	7	\$138,017				
3165000	33	0.11%	12	0.10%	\$121,707	\$1,616	1.33%	15	0.12%	1	\$56,813				
3163000	57	0.19%	18	0.16%	\$138,303	\$1,719	1.24%	17	0.14%	4	\$78,645				
3164700	6	0.02%	3	0.03%	...C	\$5,983	...C	2	0.02%	...C	\$11,965				
3162602	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



Toetoes at a glance (rural area)

The Toetoes area unit is fully contained within the Waihopai Toetoe Community Board.

Toetoes Area Unit data – selected properties

	Toetoes		Southland	
Population	1,647		29,617	
Households	582		11,523	
Median Income	\$71,033		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,742	\$1,874	\$2,789	\$2,592
Rating Units	624	(1,263)	12,498	(20,328)
Total Rates	\$2.8m	(\$3.6m)	\$53.9m	(\$66.6m)

Rates as a proportion of income



Meshblock rate/income range: 1.4%-12.6% (19 of 60 over 5%)

Distribution of household incomes

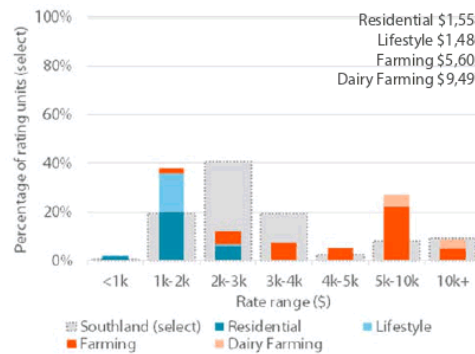
% low income households (earning under \$33,000): 13% (75 households)



Distribution of rates by land use

Median Rates:

Residential \$1,558
Lifestyle \$1,486
Farming \$5,602
Dairy Farming \$9,497



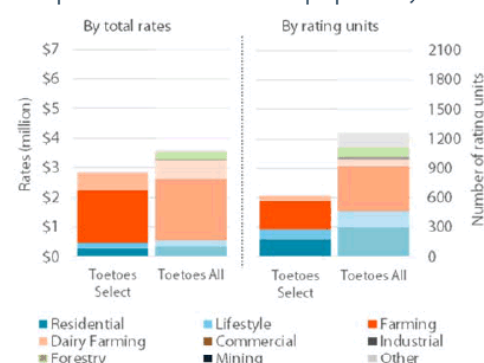
Distribution of property values by land use

Median Capital Value: \$945k

Residential \$160k
Lifestyle \$245k
Farming \$2.5m
Dairy Farming \$3.8m



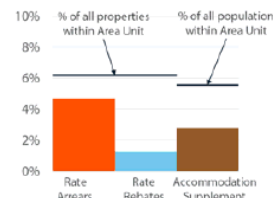
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^(SDC) + accommodation supplement



Meshblock data – selected properties

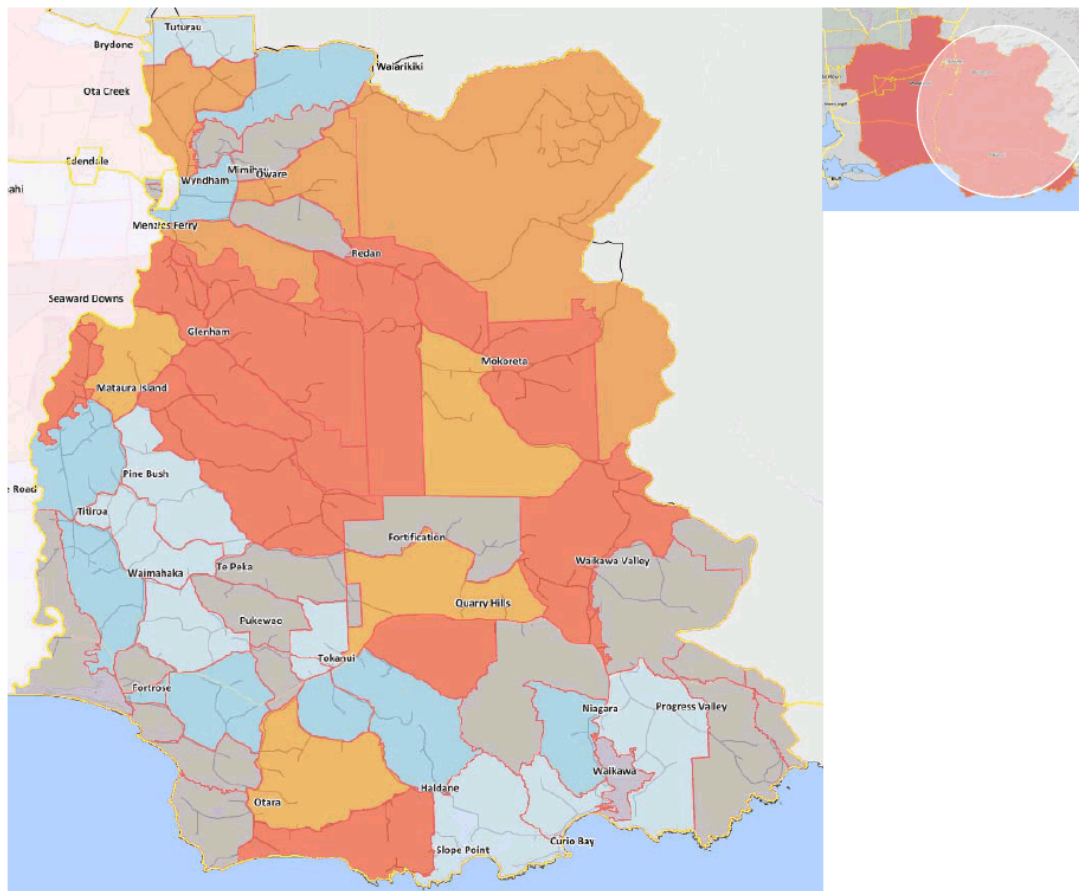
MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
3093800	24	0.08%	12	0.10%	\$57,202	\$7,188	12.57%	12	0.10%	9	\$71,452	67% \$3.5m	8% \$3.3m	% \$k	% \$k
3094300	33	0.11%	12	0.10%	\$34,078	\$3,720	10.92%	13	0.10%	9	\$55,759	69% \$2.3m		% \$k	% \$k
3165200	36	0.12%	9	0.08%	\$94,046	\$9,299	9.89%	6	0.05%	5	\$71,983	17% \$3.4m	67% \$5.9m	% \$k	% \$k
3094100	21	0.07%	9	0.08%	\$94,046	\$9,198	9.78%	5	0.04%	4	\$38,674	80% \$4.5m		% \$k	% \$k
3094400	66	0.22%	18	0.16%	\$74,684	\$6,852	9.17%	13	0.10%	10	\$113,315	69% \$4.9m	15% \$2.5m	% \$k	% \$k
3094000	21	0.07%	9	0.08%	\$94,046	\$8,361	8.89%	8	0.06%	7	\$84,687	88% \$3.7m	13% \$13m	% \$k	% \$k
3096800	24	0.08%	6	0.05%	\$60,853	\$5,366	8.82%	6	0.05%	5	\$31,288	100% \$2.4m		% \$k	% \$k
3096600	36	0.12%	12	0.10%	\$94,046	\$8,185	8.70%	6	0.05%	5	\$60,447	83% \$5.4m		% \$k	% \$k
3094700	45	0.15%	18	0.16%	\$49,789	\$4,323	8.68%	17	0.14%	14	\$82,813	82% \$2.1m	12% \$3m	% \$k	% \$k
3097200	36	0.12%	12	0.10%	\$52,555	\$4,415	8.40%	15	0.12%	10	\$72,982	80% \$2.7m		% \$k	% \$k
3094600	30	0.10%	12	0.10%	\$49,789	\$4,095	8.23%	15	0.12%	11	\$87,578	60% \$3.5m	13% \$3m	% \$k	% \$k
3094200	24	0.08%	9	0.08%	\$138,303	\$10,601	7.67%	5	0.04%	3	\$63,726	80% \$6.6m		% \$k	% \$k
3093600	42	0.14%	15	0.13%	\$119,826	\$9,096	7.59%	10	0.08%	7	\$81,369	60% \$3.6m	30% \$4.9m	% \$k	% \$k
3093400	33	0.11%	12	0.10%	\$83,867	\$6,125	7.30%	12	0.10%	9	\$72,942	75% \$3.2m	8% \$2.1m	% \$k	% \$k
3054601	72	0.24%	27	0.23%	\$80,216	\$5,617	7.00%	21	0.17%	12	\$149,238	43% \$2.3m	29% \$6.7m	% \$k	% \$k
3096701	78	0.26%	21	0.18%	\$119,826	\$7,152	5.97%	16	0.13%	9	\$112,285	88% \$3.2m	6% \$5.3m	% \$k	% \$k
3097100	42	0.14%	15	0.13%	\$85,748	\$5,117	5.97%	12	0.10%	7	\$75,186	75% \$2.5m	17% \$6.2m	% \$k	% \$k
3093900	48	0.16%	21	0.18%	\$85,748	\$5,030	5.87%	13	0.10%	8	\$83,615	62% \$2.2m	23% \$6m	% \$k	% \$k
3094500	48	0.16%	18	0.16%	\$82,982	\$4,201	5.06%	15	0.12%	8	\$69,277	27% \$2.4m	33% \$2.8m	% \$k	% \$k
3095500	45	0.15%	21	0.18%	\$30,427	\$1,468	4.82%	32	0.26%	12	\$52,875				
3054700	42	0.14%	15	0.13%	\$62,734	\$3,016	4.81%	10	0.08%	3	\$31,482				
3095200	54	0.18%	21	0.18%	\$62,734	\$2,930	4.67%	13	0.10%	6	\$60,063				
3094800	54	0.18%	18	0.16%	\$138,303	\$6,153	4.45%	15	0.12%	6	\$89,020				
3093300	66	0.22%	27	0.23%	\$68,266	\$2,689	3.94%	25	0.20%	9	\$85,967				
3097500	30	0.10%	12	0.10%	\$37,840	\$1,466	3.87%	23	0.18%	1	\$35,171				
3096900	48	0.16%	18	0.16%	\$58,087	\$2,067	3.56%	23	0.18%	4	\$55,414				
3095900	30	0.10%	12	0.10%	\$119,826	\$4,241	3.54%	9	0.07%	3	\$48,834				
3097000	27	0.09%	12	0.10%	\$58,087	\$2,049	3.53%	9	0.07%	3	\$27,862				
3096200	66	0.22%	21	0.18%	\$60,853	\$2,098	3.45%	22	0.18%	2	\$57,610				
3094900	39	0.13%	15	0.13%	\$165,964	\$5,482	3.30%	13	0.10%	2	\$82,872				
3095000	21	0.07%	9	0.08%	\$94,046	\$3,029	3.22%	15	0.12%	4	\$53,521				
3097703	30	0.10%	12	0.10%	\$49,789	\$1,593	3.20%	13	0.10%	6	\$55,929				
3097600	27	0.09%	12	0.10%	\$49,789	\$1,558	3.13%	42	0.34%	1	\$76,422				
3095300	30	0.10%	12	0.10%	\$94,046	\$2,830	3.01%	18	0.14%	5	\$69,845				
3054402	63	0.21%	15	0.13%	\$60,853	\$1,648	2.71%	17	0.14%	5	\$59,560				
3096100	9	0.03%	6	0.05%	\$60,853	\$1,630	2.68%	8	0.06%	0	\$13,418				
3097300	33	0.11%	12	0.10%	\$138,303	\$1,865	1.35%	36	0.29%	3	\$93,499				
3095700	18	0.06%	6	0.05%	...C	\$5,133	...C	6	0.05%	...C	\$37,337				

Assessing Southland rates affordability

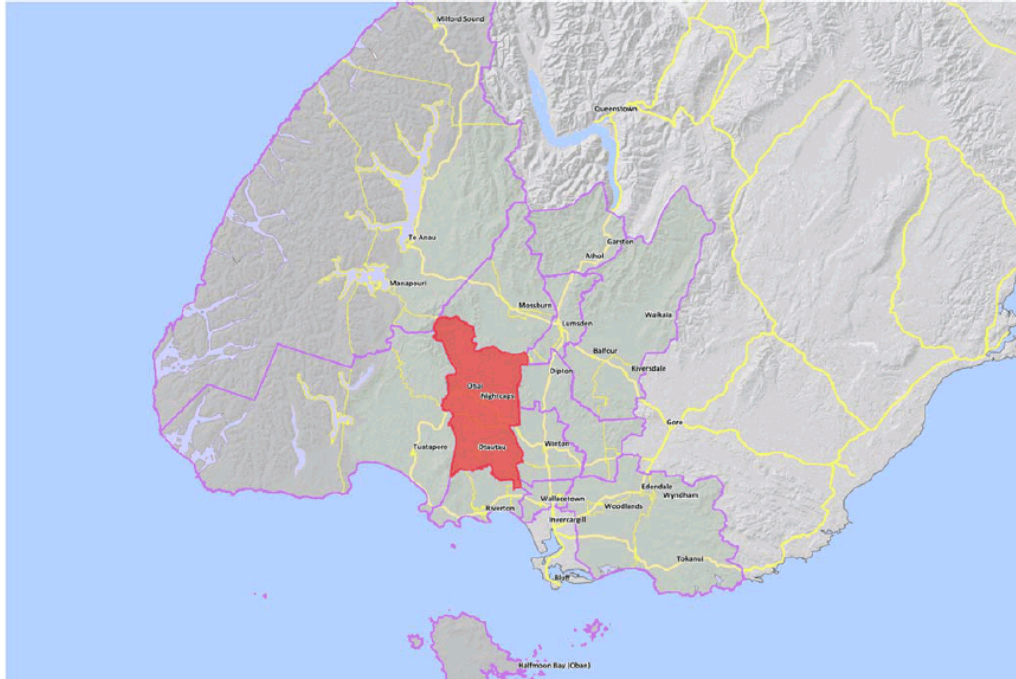
MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
3093700	15	0.05%	6	0.05%	...C	\$9,106	...C	4	0.03%	...C	\$35,748				
3095600	3	0.01%	0	0.00%	...C	\$1,531	...C	8	0.06%	...C	\$35,091				
3096400	12	0.04%	3	0.03%	...C	\$6,368	...C	5	0.04%	...C	\$34,216				
3095800	18	0.06%	6	0.05%	...C	\$4,409	...C	6	0.05%	...C	\$28,385				
3093500	15	0.05%	3	0.03%	...C	\$6,791	...C	4	0.03%	...C	\$25,818				
3096500	15	0.05%	6	0.05%	...C	\$6,983	...C	4	0.03%	...C	\$25,057				
3095400	15	0.05%	6	0.05%	...C	\$2,117	...C	7	0.06%	...C	\$22,865				
3097801	15	0.05%	3	0.03%	...C	\$4,361	...C	4	0.03%	...C	\$18,522				
3096300	9	0.03%	6	0.05%	...C	\$5,251	...C	4	0.03%	...C	\$17,222				
3093200	18	0.06%	3	0.03%	...C	\$2,549	...C	4	0.03%	...C	\$11,644				
3096000	3	0.01%	3	0.03%	...C	\$4,005	...C	2	0.02%	...C	\$8,010				
3097400	12	0.04%	3	0.03%	...C	\$3,011	...C	2	0.02%	...C	\$6,023				
3097902	3	0.01%	0	0.00%	...C	\$5,714	...C	1	0.01%	...C	\$5,714				
2999702	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				
2999802	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				
2999901	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				
3095100	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				
3096702	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				
3097702	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				
3097804	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				
3098002	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				
3098102	0	0.00%	0	0.00%	...C	N/A	...C	0	0.00%	...C	\$0				

Assessing Southland rates affordability

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



Wallace Takitimu Community Board



The Wallace Takitimu Community Board area contains six area units and 79 meshblocks. The area units that are either wholly or partly within community board area include:

- Otautau (whole) – the township urban area
- Ohai (whole) – the township urban area and a small rural area surrounding
- Nightcaps (whole) – the township urban area
- Fairfax (part) – the rural area in the southern part of the board area and including the township urban area of Drummond
- Wairoa (part) – the rural area in the northern part of the board area
- Waianiwa (part) – a small section of rural area in the south eastern corner of the board area

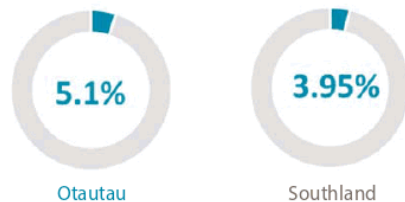
Otautau at a glance (urban area)

The Otautau area unit is fully contained within the Wallace Takitimu Community Board.

Otautau Area Unit data – selected properties

	Otautau		Southland	
Population	669		29,617	
Households	291		11,523	
Median Income	\$52,887		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,694	\$2,670	\$2,789	\$2,592
Rating Units	320	(478)	12,498	(20,328)
Total Rates	\$0.9m	(\$1.1m)	\$53.9m	(\$66.6m)

Rates as a proportion of income



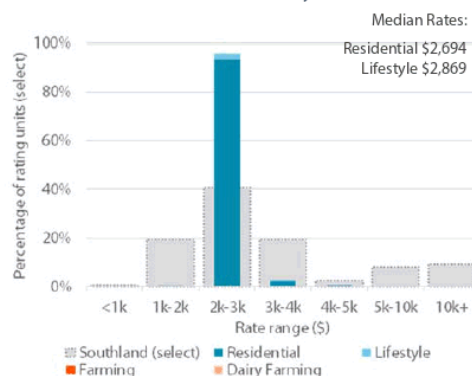
Meshblock rate/income range: 2.9%-7.4% (6 of 14 over 5%)

Distribution of household incomes

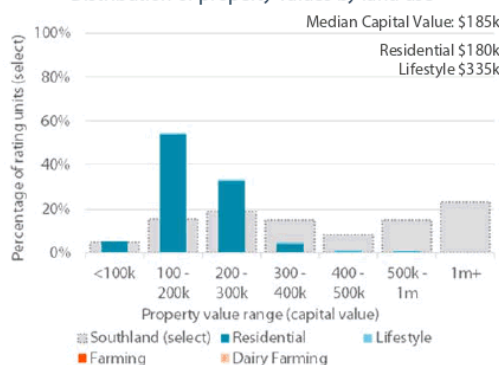
% low income households (earning under \$33,000): 26% (75 households)



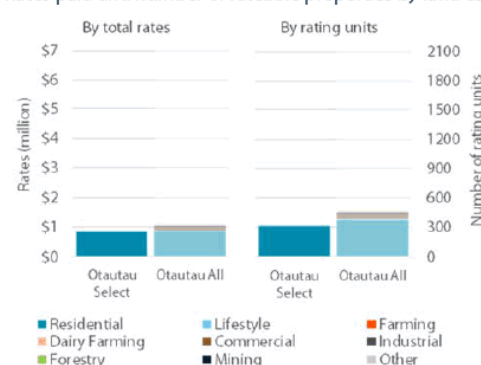
Distribution of rates by land use



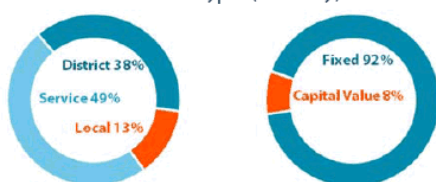
Distribution of property values by land use



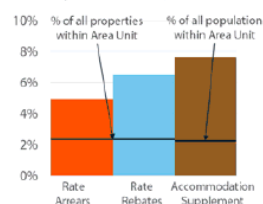
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



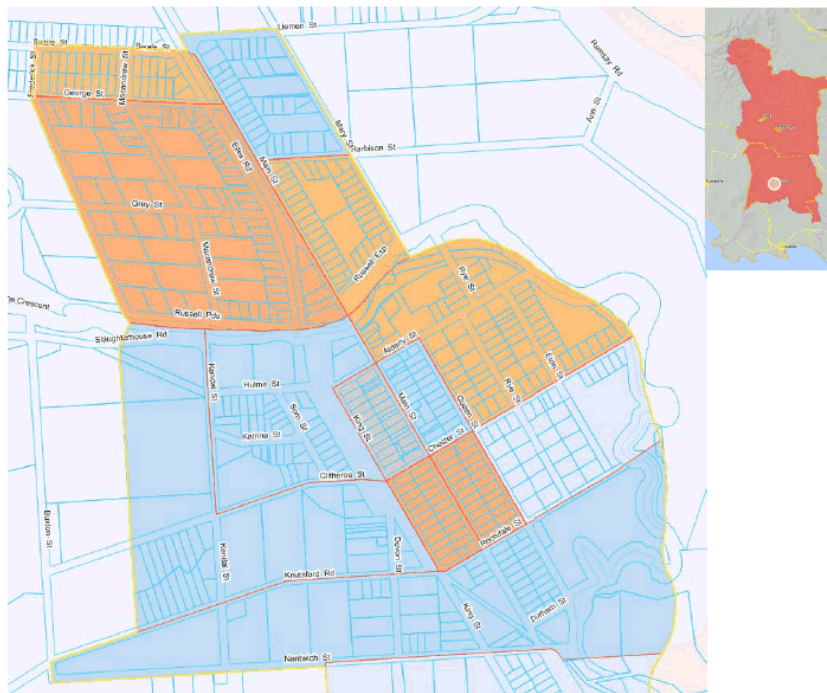
Share of rate arrears/rebates^{SDC} + accommodation supplement



Meshblock data – selected properties

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
3177200	39	0.13%	21	0.18%	\$35,959	\$2,670	7.42%	18	0.14%	18	\$49,375				100% \$162k
3177300	15	0.05%	12	0.10%	\$35,959	\$2,670	7.42%	11	0.09%	11	\$29,218				100% \$160k
3176400	51	0.17%	24	0.21%	\$39,610	\$2,695	6.80%	25	0.20%	25	\$67,335			4%	96% \$172k
3176200	48	0.16%	21	0.18%	\$46,138	\$2,694	5.84%	23	0.18%	23	\$62,014				100% \$172k
3176800	99	0.33%	48	0.42%	\$46,138	\$2,682	5.81%	54	0.43%	54	\$145,002				100% \$173k
3176500	66	0.22%	27	0.23%	\$52,555	\$2,702	5.14%	28	0.22%	24	\$76,760				100% \$177k
3177100	78	0.26%	36	0.31%	\$56,206	\$2,682	4.77%	36	0.29%	6	\$96,311				
3176600	30	0.10%	12	0.10%	\$60,853	\$2,684	4.41%	12	0.10%	1	\$31,969				
3177000	18	0.06%	9	0.08%	\$60,853	\$2,676	4.40%	9	0.07%	0	\$24,054				
3176300	66	0.22%	24	0.21%	\$71,918	\$2,769	3.85%	27	0.22%	0	\$74,453				
3176700	48	0.16%	21	0.18%	\$71,918	\$2,652	3.69%	29	0.23%	1	\$78,451				
3177500	81	0.27%	30	0.26%	\$80,216	\$2,755	3.43%	34	0.27%	0	\$93,956				
3177400	27	0.09%	9	0.08%	\$94,046	\$2,701	2.87%	13	0.10%	0	\$34,582				
3176900	6	0.02%	3	0.03%	...C	\$2,726	...C	1	0.01%	...C	\$2,726				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



Ohai at a glance (urban area)

The Ohai area unit is fully contained within the Wallace Takitimu Community Board.

Ohai Area Unit data – selected properties

	Ohai	Southland
Population	303	29,617
Households	126	11,523
Median Income	\$30,427	\$70,590
	Selected	(All)
Median Rates	\$2,527	\$2,497
Rating Units	151	(297)
Total Rates	\$0.4m	(\$0.5m)
	Selected	(All)
Median Rates	\$2,527	\$2,789
Rating Units	151	(20,328)
Total Rates	\$53.9m	(\$66.6m)

Rates as a proportion of income



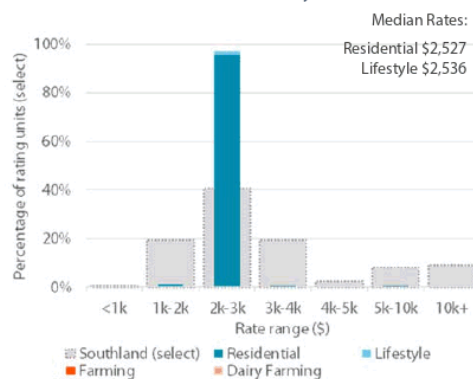
Meshblock rate/income range: 5.2%-18.3% (7 of 10 over 5%)

Distribution of household incomes

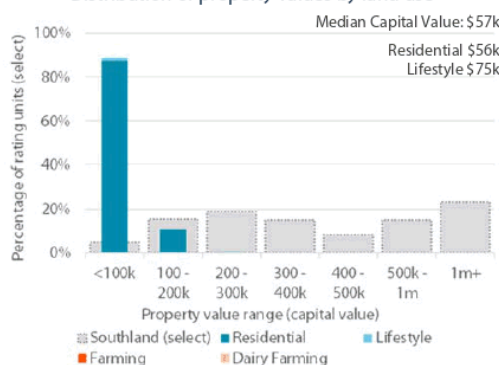
% low income households (earning under \$33,000): 38% (48 households)



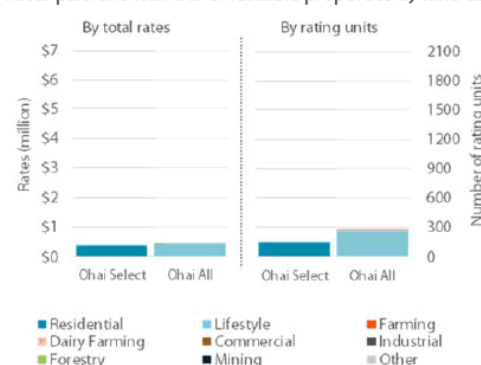
Distribution of rates by land use



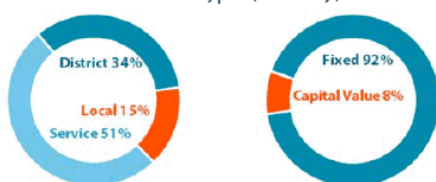
Distribution of property values by land use



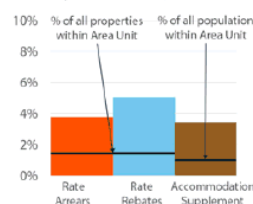
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



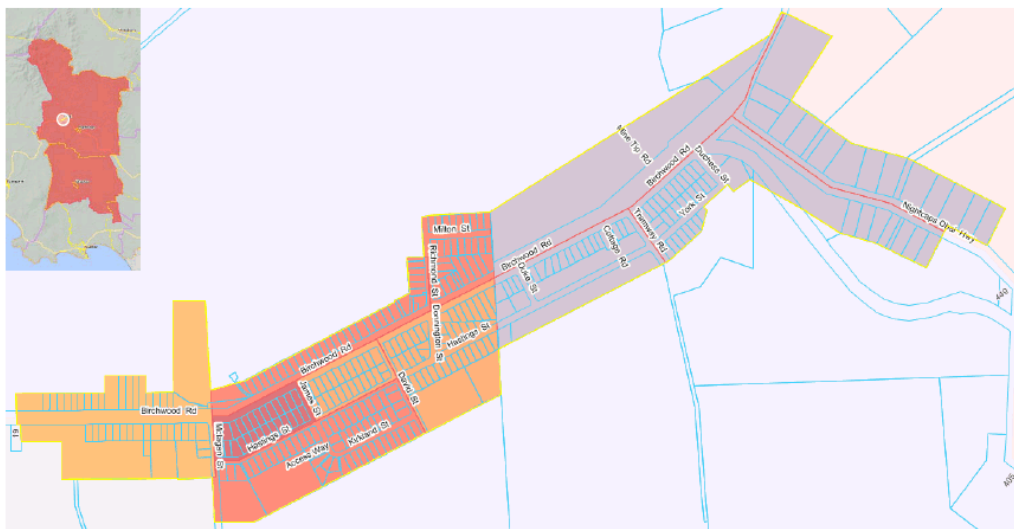
Share of rate arrears/rebates^{SDC} + accommodation supplement



Meshblock data – selected properties

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
3180800	27	0.09%	12	0.10%	\$13,830	\$2,528	18.28%	18	0.14%	18	\$45,359				100% \$65%
3181300	27	0.09%	15	0.13%	\$20,248	\$2,506	12.38%	15	0.12%	15	\$37,627				100% \$41%
3181000	45	0.15%	18	0.16%	\$28,546	\$2,532	8.87%	25	0.20%	25	\$63,552				100% \$70%
3180700	33	0.11%	15	0.13%	\$31,312	\$2,537	8.10%	17	0.14%	17	\$45,980				100% \$62%
3180900	60	0.20%	24	0.21%	\$36,844	\$2,529	6.86%	18	0.14%	18	\$45,617				100% \$62%
3181200	42	0.14%	21	0.18%	\$37,840	\$2,517	6.65%	27	0.22%	26	\$67,572				100% \$65%
3180600	36	0.12%	12	0.10%	\$48,904	\$2,557	5.23%	15	0.12%	15	\$38,511			7% \$240k	93% \$76%
3181100	12	0.04%	9	0.08%	...C	\$2,531	...C	5	0.04%	...C	\$12,633				
3181500	15	0.05%	3	0.03%	...C	\$2,509	...C	8	0.06%	...C	\$18,411				
3181600	6	0.02%	0	0.00%	...C	\$2,536	...C	3	0.02%	...C	\$7,220				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



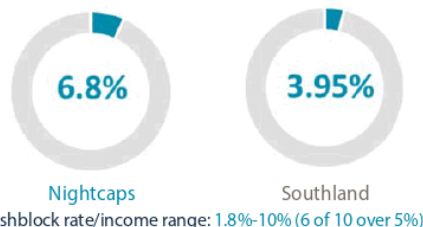
Nightcaps at a glance (urban area)

The Nightcaps area unit is fully contained within the Wallace Takitimu Community Board.

Nightcaps Area Unit data – selected properties

	Nightcaps		Southland	
Population	294		29,617	
Households	135		11,523	
Median Income	\$36,844		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$2,509	\$2,472	\$2,789	\$2,592
Rating Units	153	(276)	12,498	(20,328)
Total Rates	\$0.4m	(\$0.5m)	\$53.9m	(\$66.6m)

Rates as a proportion of income



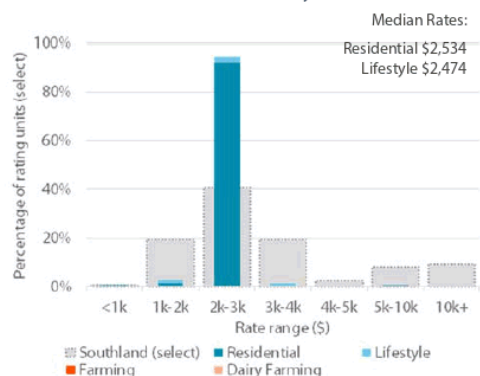
Meshblock rate/income range: 1.8%-10% (6 of 10 over 5%)

Distribution of household incomes

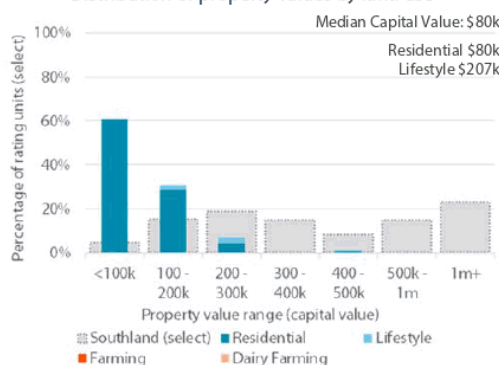
% low income households (earning under \$33,000): 38% (51 households)



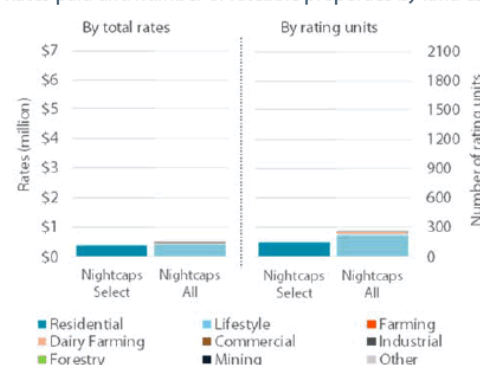
Distribution of rates by land use



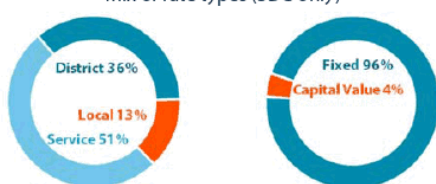
Distribution of property values by land use



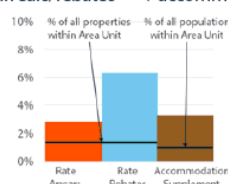
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



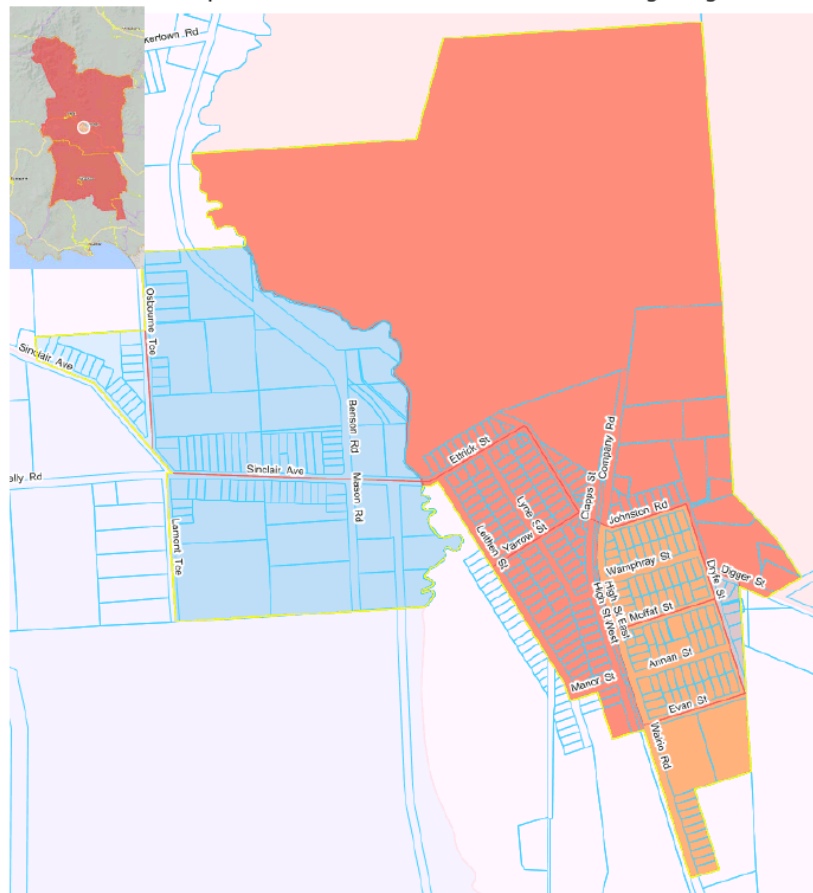
Share of rate arrears/rebates^{SDC} + accommodation supplement



Meshblock data – selected properties

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
3180000	24	0.08%	15	0.13%	\$24,895	\$2,483	9.97%	18	0.14%	18	\$44,344				100% \$75k
3179900	42	0.14%	15	0.13%	\$30,427	\$2,557	8.40%	19	0.15%	19	\$50,063			11% \$238k	89% \$121k
3180100	21	0.07%	9	0.08%	\$30,427	\$2,514	8.26%	13	0.10%	13	\$32,776				100% \$90k
3180200	30	0.10%	18	0.16%	\$31,312	\$2,499	7.98%	24	0.19%	23	\$58,615				100% \$90k
3180300	66	0.22%	33	0.29%	\$34,631	\$2,506	7.24%	31	0.25%	30	\$80,338				100% \$95k
3180500	15	0.05%	6	0.05%	\$40,606	\$2,517	6.20%	6	0.05%	6	\$14,758				100% \$86k
3179700	27	0.09%	12	0.10%	\$62,734	\$2,551	4.07%	16	0.13%	0	\$40,116				
3179800	36	0.12%	12	0.10%	\$68,266	\$2,509	3.67%	15	0.12%	0	\$37,434				
3179600	18	0.06%	6	0.05%	\$138,303	\$2,493	1.80%	6	0.05%	0	\$15,474				
3180400	12	0.04%	3	0.03%	...C	\$2,472	...C	5	0.04%	...C	\$12,418				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



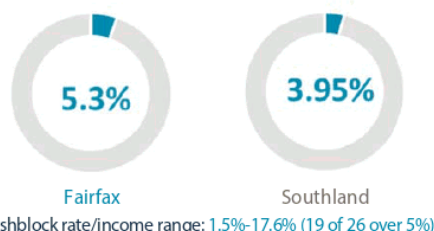
Fairfax at a glance (rural area split over multiple Community Boards)

The Fairfax area unit covers more than one community board (Wallace Takitimu, Oraka Apaipima and Oreti) with the majority of the area unit contained within Wallace Takitimu. The area unit data below is for the entire area unit as 2013 Census income data is not currently available for each community board area. The meshblock data and map that follows shows only the meshblocks within area unit that fit within relevant board area.

Fairfax Area Unit data – selected properties

	Fairfax		Southland	
Population	1,908		29,617	
Households	693		11,523	
Median Income	\$84,863		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$4,499	\$2,455	\$2,789	\$2,592
Rating Units	510	(834)	12,498	(20,328)
Total Rates	\$3.8m	(\$4.1m)	\$53.9m	(\$66.6m)

Rates as a proportion of income

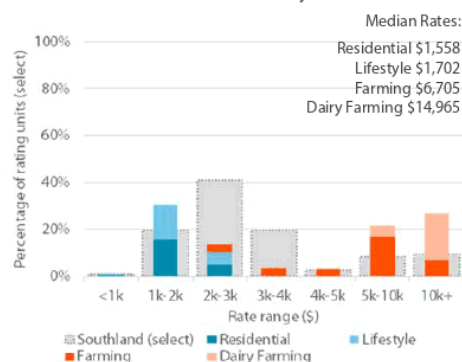


Distribution of household incomes

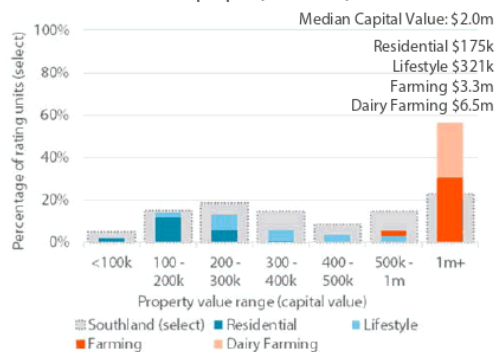
% low income households (earning under \$33,000): **10%** (72 households)



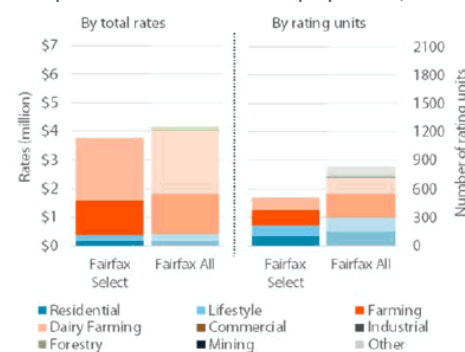
Distribution of rates by land use



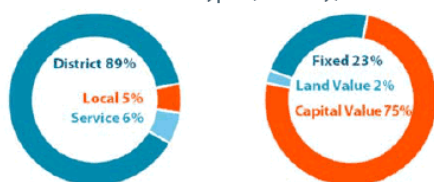
Distribution of property values by land use



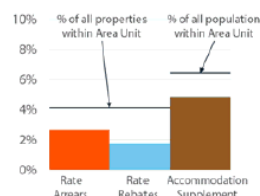
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^(SDC) + accommodation supplement

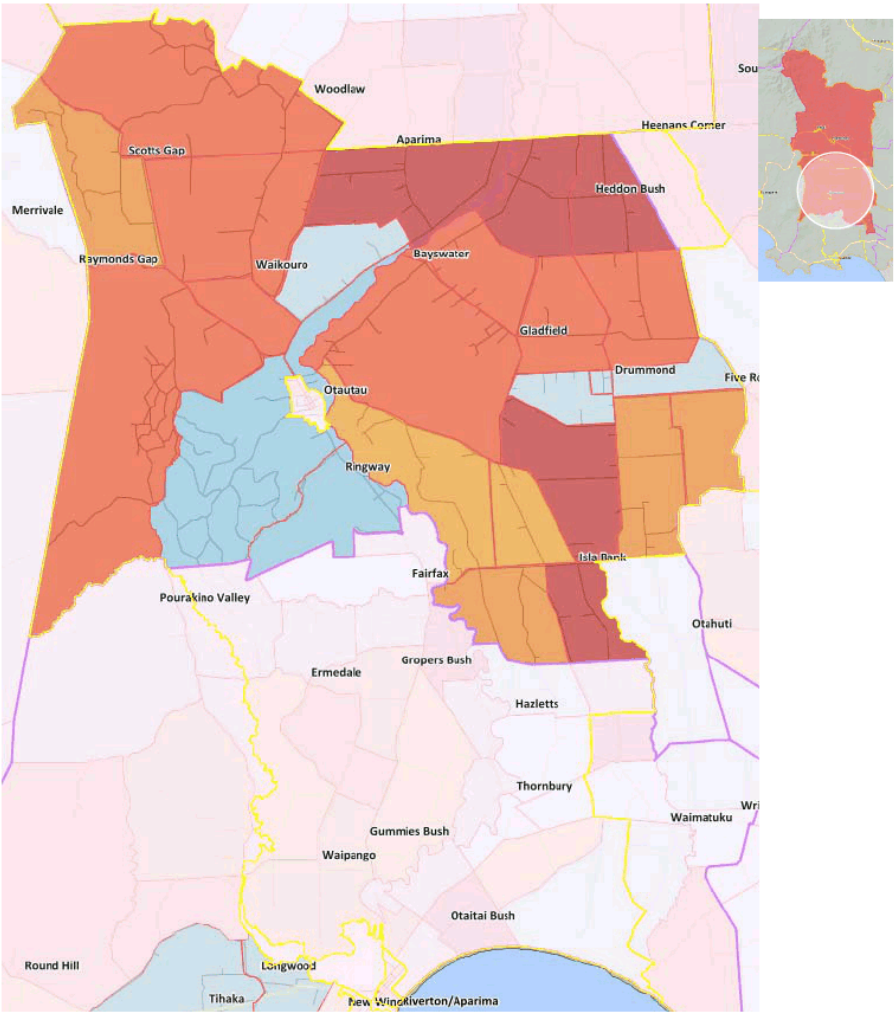


Meshblock data – selected properties

The meshblock data table and map below shows the information for the meshblocks contained within Fairfax area unit within Wallace Takitimu Community Board area. To view the meshblock and map data for this area unit within other board areas refer to the relevant community board section (Oraka Aparima on page 80, and Oreti on page 101).

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
Within Wallace Takitimu Community Board area															
3182901	33	0.11%	12	0.10%	\$60,853	\$10,557	17.35%	6	0.05%	4	\$80,888	33% \$4.5m	33% \$11.6m	17% \$270k	17% \$185k
3184700	39	0.13%	12	0.10%	\$71,918	\$11,637	16.18%	6	0.05%	4	\$55,692	17% \$5.6m	50% \$6.5m	33% \$310k	
3178100	78	0.26%	18	0.16%	\$102,344	\$15,797	15.44%	13	0.10%	11	\$194,847	23% \$6.5m	69% \$7.1m		8% \$50k
3183800	69	0.23%	27	0.23%	\$71,918	\$10,124	14.08%	15	0.12%	8	\$153,753	13% \$4.5m	40% \$9.1m	40% \$410k	7% \$165k
3183002	42	0.14%	18	0.16%	\$58,087	\$7,741	13.33%	12	0.10%	8	\$100,011	42% \$5.6m	25% \$6.9m	25% \$310k	8% \$100k
3182902	30	0.10%	12	0.10%	\$94,046	\$11,977	12.74%	8	0.06%	8	\$104,745	63% \$3.5m	37% \$8.3m		
3177700	75	0.25%	30	0.26%	\$80,216	\$10,204	12.72%	16	0.13%	11	\$190,681	19% \$4.7m	50% \$8.5m	31% \$336k	
3177601	69	0.23%	24	0.21%	\$94,046	\$11,624	12.36%	13	0.10%	13	\$163,930	31% \$4.7m	69% \$6.4m		
3183300	96	0.32%	27	0.23%	\$80,216	\$8,484	10.58%	20	0.16%	14	\$221,852	35% \$2.4m	45% \$7.6m	20% \$480k	
3177800	42	0.14%	9	0.08%	\$138,303	\$13,872	10.03%	4	0.03%	4	\$56,873		100% \$5.5m		
3183200	51	0.17%	21	0.18%	\$71,918	\$7,167	9.97%	12	0.10%	8	\$94,630	50% \$4.7m	25% \$6m	17% \$383k	8% \$200k
3177900	27	0.09%	9	0.08%	\$91,280	\$8,342	9.14%	7	0.06%	6	\$53,864	72% \$3.9m	14% \$5.5m	14% \$400k	
3183100	33	0.11%	12	0.10%	\$94,046	\$7,642	8.13%	12	0.10%	9	\$98,457	75% \$3.9m	25% \$4.5m	k	
3184601	57	0.19%	18	0.16%	\$77,450	\$5,768	7.45%	13	0.10%	9	\$111,576	47% \$3m	38% \$6.2m	15% \$488k	
3077702	24	0.08%	9	0.08%	\$94,046	\$6,982	7.42%	5	0.04%	4	\$47,536	40% \$2.6m	40% \$7.8m	20% \$383k	
3077600	60	0.20%	21	0.18%	\$74,684	\$5,062	6.78%	12	0.10%	7	\$105,549	33% \$4.1m	25% \$10.4m	9% \$530k	33% \$255k
3177602	18	0.06%	6	0.05%	\$119,826	\$7,738	6.46%	7	0.06%	5	\$59,537	86% \$3.2m	14% \$19.8m		
3183600	75	0.25%	27	0.23%	\$113,741	\$6,595	5.80%	16	0.13%	10	\$140,632	50% \$4m	25% \$7.5m	25% \$518k	
3183700	30	0.10%	12	0.10%	\$71,918	\$3,646	5.07%	11	0.09%	6	\$70,469	18% \$2.7m	36% \$5.7m	18% \$408k	28% \$182k
3178400	24	0.08%	9	0.08%	\$138,303	\$6,514	4.71%	9	0.07%	4	\$51,772				
3178300	45	0.15%	18	0.16%	\$57,202	\$2,686	4.70%	19	0.15%	5	\$71,158				
3178000	81	0.27%	30	0.26%	\$66,386	\$2,695	4.06%	32	0.26%	8	\$121,051				
3178200	27	0.09%	9	0.08%	\$165,964	\$5,570	3.36%	10	0.08%	2	\$61,834				
3183500	66	0.22%	27	0.23%	\$49,789	\$1,565	3.14%	30	0.24%	0	\$46,448				
3074500	33	0.11%	12	0.10%	\$68,266	\$1,598	2.34%	12	0.10%	4	\$60,125				
3183400	27	0.09%	9	0.08%	\$119,826	\$1,781	1.49%	9	0.07%	1	\$42,035				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



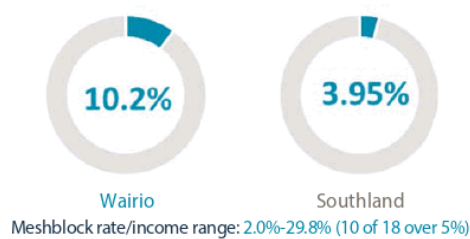
Wairio at a glance (rural area split over multiple Community Boards)

The Wairio area unit covers more than one community board (Wallace Takitimu, Tuatapere Te Waewae, Fiordland and Northern) with the majority of the area unit contained within Wallace Takitimu. The area unit data below is for the entire area unit as 2013 Census income data is not currently available for each community board area. The meshblock data and map that follows shows only the meshblocks within area unit that fit within relevant board area.

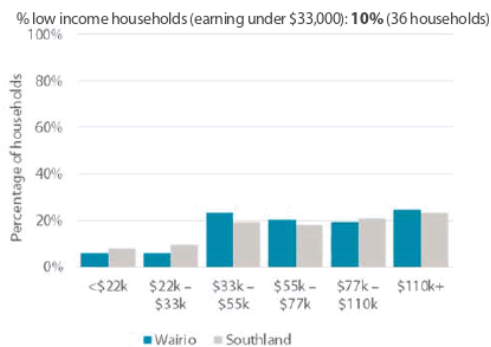
Wairio Area Unit data – selected properties

	Wairio		Southland	
Population	942		29,617	
Households	354		11,523	
Median Income	\$71,364		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$7,275	\$3,186	\$2,789	\$2,592
Rating Units	243	(460)	12,498	(20,328)
Total Rates	\$2.3m	(\$2.8m)	\$53.9m	(\$66.6m)

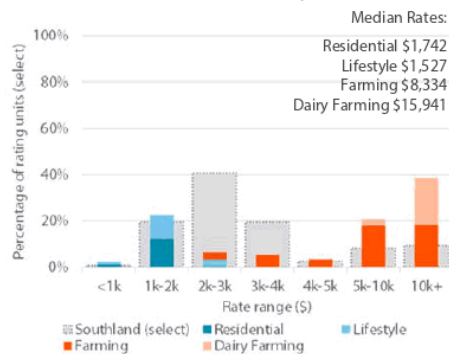
Rates as a proportion of income



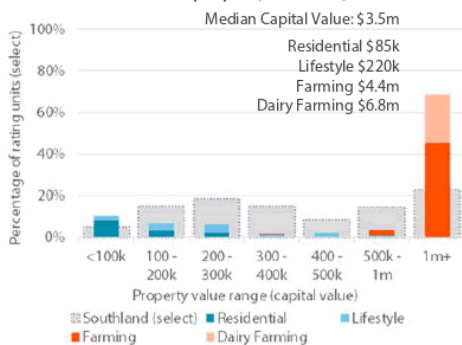
Distribution of household incomes



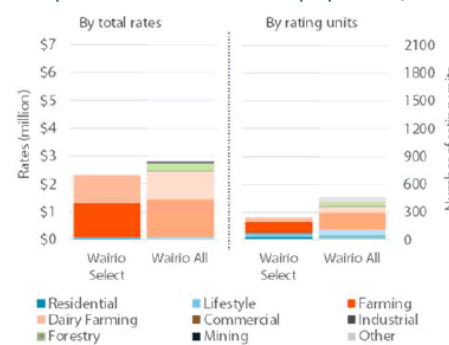
Distribution of rates by land use



Distribution of property values by land use



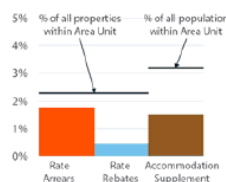
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^(SDQ) + accommodation supplement

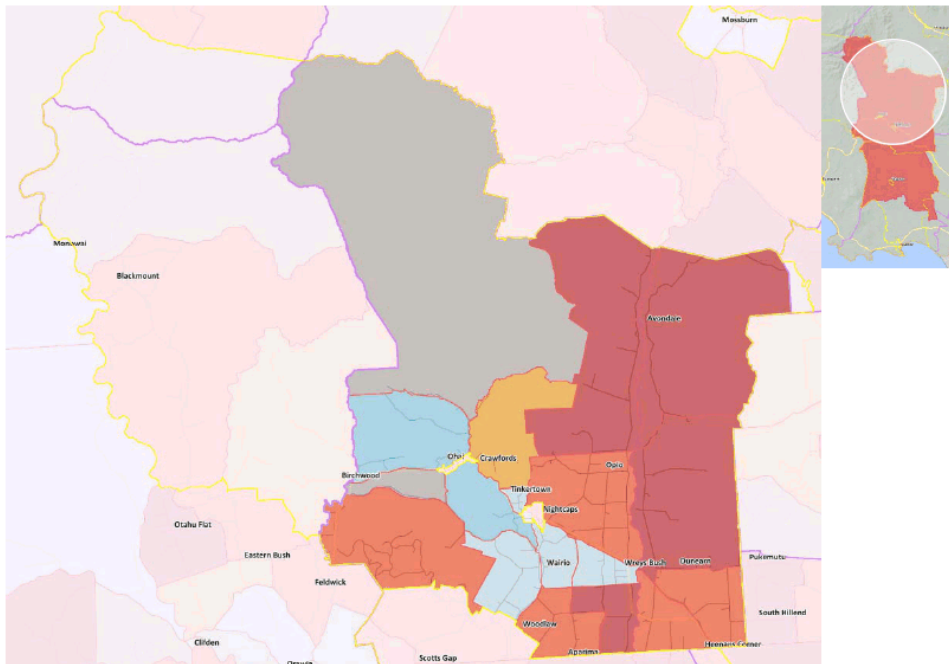


Meshblock data – selected properties

The meshblock data table and map below shows the information for the meshblocks contained within Wairio area unit within Wallace Takitimu Community Board area. To view the meshblock and map data for this area unit within other board areas refer to the relevant community board section (Tuatapere Te Waewae on page 116, Fiordland on page 50 and Northern on page 66).

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)				Land use			
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	LifeS % LU Av CV	Res % LU Av CV
Within Wallace Takitimu Community Board area															
3179200	48	0.16%	15	0.13%	\$49,789	\$14,817	29.76%	8	0.06%	7	\$124,363	74% \$7.8m	13% \$17.3m	13%	
3179300	87	0.29%	30	0.26%	\$57,202	\$13,388	23.40%	20	0.16%	18	\$285,715	50% \$5m	45% \$9.2m	5%	
3178600	84	0.28%	30	0.26%	\$80,216	\$13,332	16.62%	14	0.11%	13	\$215,089	50% \$4.5m	50%		
3179100	39	0.13%	15	0.13%	\$71,918	\$11,942	16.61%	11	0.09%	8	\$109,013	36% \$5.8m	36% \$6.6m	18%	10%
3179500	51	0.17%	18	0.16%	\$61,739	\$8,015	12.98%	15	0.12%	12	\$138,482	33% \$4.8m	47% \$4.8m	13%	7%
3179400	48	0.16%	18	0.16%	\$71,918	\$9,282	12.91%	12	0.10%	12	\$134,247	67% \$4.5m	33% \$7.3m		
3178700	96	0.32%	33	0.29%	\$94,046	\$11,208	11.92%	19	0.15%	19	\$229,081	53% \$5.1m	47% \$6.5m		
3179000	66	0.22%	24	0.21%	\$71,918	\$7,275	10.12%	19	0.15%	15	\$147,958	47% \$3.1m	37% \$5.5m	16%	
3182700	48	0.16%	15	0.13%	\$82,982	\$6,967	8.40%	8	0.06%	8	\$74,077	75% \$3.8m	25% \$7.6m		
3182300	18	0.06%	12	0.10%	\$68,266	\$3,465	5.08%	6	0.05%	3	\$31,877	67% \$3.6m		33%	
3182500	21	0.07%	9	0.08%	\$46,138	\$2,135	4.63%	12	0.10%	5	\$47,815				
3182200	48	0.16%	18	0.16%	\$71,918	\$2,668	3.71%	10	0.08%	3	\$160,788				
3182800	69	0.23%	27	0.23%	\$60,853	\$1,835	3.02%	25	0.20%	7	\$121,481				
3178800	39	0.13%	15	0.13%	\$85,748	\$2,362	2.76%	11	0.09%	3	\$54,997				
3178900	57	0.19%	18	0.16%	\$71,918	\$1,484	2.06%	12	0.10%	2	\$86,432				
3182600	15	0.05%	6	0.05%	\$91,280	\$1,826	2.00%	7	0.06%	0	\$13,757				
3182400	3	0.01%	0	0.00%	...C	\$4,994	...C	4	0.03%	...C	\$38,768				
3181800	0	0.00%	0	0.00%	...C	\$8,256	...C	4	0.03%	...C	\$35,667				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)



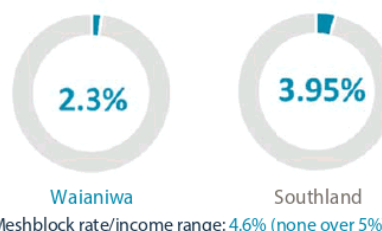
Waianiwa at a glance (rural area split over multiple Community Boards)

The Waianiwa area unit covers more than one community board (Oreti, Oraka Apanima and Wallace Takitimu) with the majority of the area unit contained within Oreti. The area unit data below is for the entire area unit as 2013 Census income data is not currently available for each community board area. The meshblock data and map that follows shows only the meshblocks within area unit that fit within relevant board area.

Waianiwa Area Unit data – selected properties

	Waianiwa		Southland	
Population	1,968		29,617	
Households	711		11,523	
Median Income	\$85,748		\$70,590	
	Selected	(All)	Selected	(All)
Median Rates	\$1,966	1,804	\$2,789	\$2,592
Rating Units	620	(943)	12,498	(20,328)
Total Rates	\$2.9m	(\$3.4m)	\$53.9m	(\$66.6m)

Rates as a proportion of income

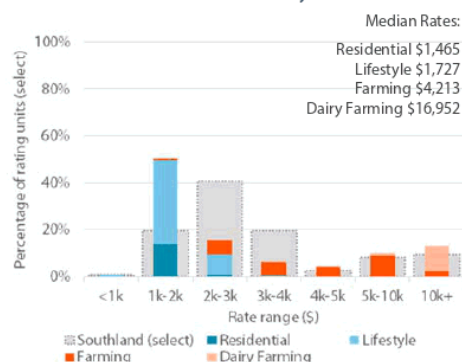


Distribution of household incomes

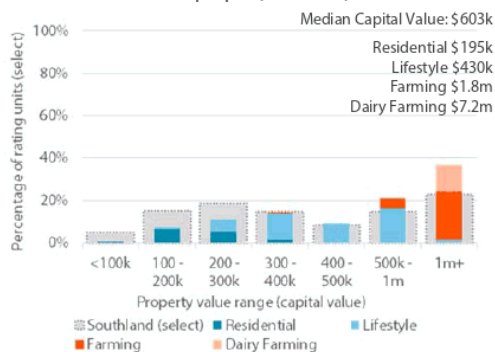
% low income households (earning under \$33,000): 9% (66 households)



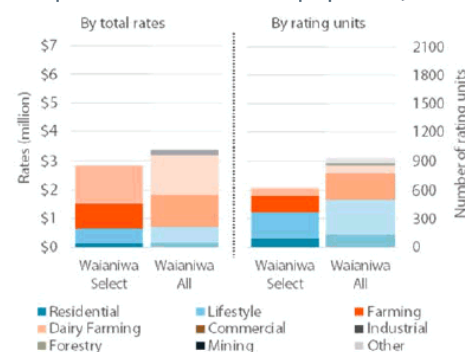
Distribution of rates by land use



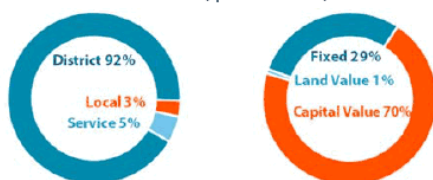
Distribution of property values by land use



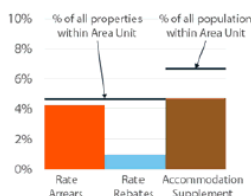
Rates paid and number of rateable properties by land use



Mix of rate types (SDC only)



Share of rate arrears/rebates^(SDC) + accommodation supplement



Meshblock data – selected properties

The meshblock data table and map below shows the information for the meshblocks contained within Waianiwa area unit within Oreti Community Board area. To view the meshblock and map data for this area unit within other board areas refer to the relevant community board section (Oreti on page 98 and Oraka Aparima on page 83).

MB	Population		Households		Median Income	Median Rates	Rates as a % of income	Rating Units (selected)							
	No.	% of District	No.	% of District				No.	% of District	No. Rates >5% Median Income	Rates (\$)	Farm % LU Av CV	Dairy % LU Av CV	Life5 % LU Av CV	Res % LU Av CV
Within Wallace Takitimu Community Board area															
3078100	75	0.25%	27	0.23%	\$85,748	\$3,937	4.59%	23	0.18%	11	\$155,115				

Meshblock Heatmap: rates as % of median income (red shading = higher rates burden)

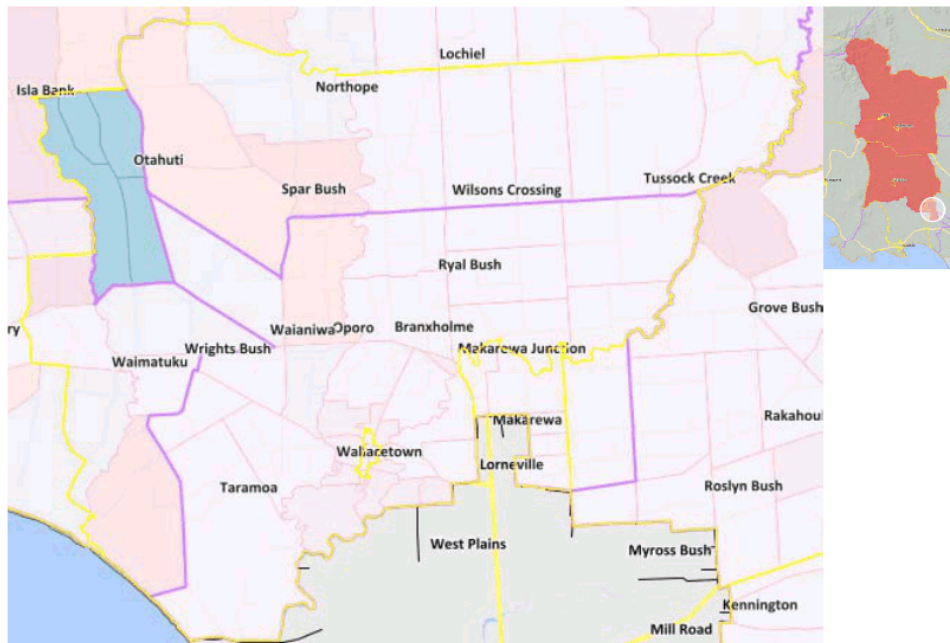


Table 1: Southland Residential Household Rates Affordability Summary by Area Unit

Area Unit	Rates % Household Income	Median Household Income	Rates 2019 (SDC + ES)			Usually Resident Population (2013)	Number of Households (2013)	Number of Rating Units (selected)	Median Property Value (selected)		2018 NZ Deprivation Index ¹ 1 (least)-10 (most)	Low Income Households (HH)		Rate Arrears		Rate Rebates		Accommodation Supplement	
			Median	Average	Total (\$m)				Capital Value	Land Value		% HH over AU share	% AU HH income under \$33k	% rating units over AU share	% AU rating units in arrears	% rating units over AU share	% AU rating units with rebate	% pop. over AU share	% AU pop. with supplement
Wairio ^(R)	10.19%	\$71,364	\$7,275	\$9,480	\$2.3	942	354	243	\$3.52m	\$2.88m	6		10-20%		5-10%		<5%		<3%
Ohai ^(U)	8.31%	\$30,427	\$2,527	\$2,533	\$0.4	303	126	151	\$57k	\$15k	9	1-2%	30+	2-3%	15%+	3-6%	10-15%	2-3%	7%+
Kaweku ^(R)	7.11%	\$88,072	\$6,262	\$8,364	\$1.4	567	204	166	\$2.92m	\$2.39m	5		<10%		<5%		<5%		
Riverton East ^(U)	7.01%	\$38,946	\$2,731	\$2,765	\$0.6	435	192	204	\$213k	\$57k	8	2-3%	30+	0<1%	5-10%	<3%	5-10%	2-3%	5-7%
Nightcaps ^(U)	6.81%	\$36,844	\$2,509	\$2,525	\$0.4	294	135	153	\$80k	\$22k	10	1-2%	30+	1-2%	10-15%	3-6%	10-15%	2-3%	7%+
Riverton West ^(U)	5.74%	\$51,559	\$2,959	\$3,015	\$2.5	999	459	823	\$360k	\$173k	6	2-3%	20-30%	1-2%	5-10%	3-6%	5-10%	2-3%	3-5%
Tuatapere ^(U)	5.65%	\$46,470	\$2,624	\$2,655	\$0.7	558	246	261	\$141k	\$32k	8	1-2%	20-30%	2-3%	15%+	6-10%	10-15%	2-3%	5-7%
Manapouri ^(M)	5.40%	\$55,764	\$3,010	\$3,206	\$0.8	228	105	244	\$315k	\$121k	4	<1%	20-30%		5-10%		<5%	<1%	3-5%
Wyndham ^(U)	5.35%	\$58,087	\$3,108	\$2,984	\$0.7	534	222	232	\$120k	\$17k	8	1-2%	20-30%	3%+	15%+	3-6%	5-10%	3-4%	7%+
Fairfax ^(R)	5.30%	\$84,863	\$4,499	\$7,340	\$3.7	1,908	693	510	\$1.97m	\$1.58m	5		10-20%		<5%		<5%		<3%
Otautau ^(U)	5.09%	\$52,887	\$2,694	\$2,707	\$0.9	669	291	320	\$185k	\$20k	8	1-2%	20-30%	2-3%	10-15%	3-6%	5-10%	5-6%	7%+
Lumsden ^(U)	5.06%	\$53,108	\$2,686	\$2,703	\$0.6	405	177	220	\$180k	\$29k	8	1-2%	20-30%	2-3%	10-15%	<3%	<5%	1-2%	5-7%
Te Anau ^(U)	4.96%	\$62,513	\$3,100	\$3,195	\$4.7	1,911	813	1,469	\$390k	\$155k	4	1-2%	10-20%		<5%		<5%		<3%
Winton ^(U)	4.66%	\$58,530	\$2,729	\$2,784	\$3.0	2,211	957	1,074	\$260k	\$99k	6	4%+	20-30%		5-10%	10%+	5-10%	6-7%	3-5%
Balfour ^(U)	4.51%	\$55,985	\$2,526	\$2,453	\$0.2	126	54	64	\$158k	\$20k	2	<1%	20-30%		5-10%	<3%	<5%		
Mararoa River ^(R)	4.08%	\$83,314	\$3,397	\$6,981	\$3.9	1,587	594	552	\$965k	\$390k	3		<10%		<5%		<5%		<3%
Stewart Island ^(U)	3.95%	\$59,526	\$2,353	\$2,479	\$0.8	381	171	334	\$310k	\$126k	5	1-2%	20-30%		<5%		<5%		<3%
Milford ^(U)	3.91%	\$52,555	\$2,054	\$2,283	\$0.05	117	30	20	\$673k	\$570k	3				<5%				
Toetoes ^(R)	3.86%	\$71,033	\$2,742	\$4,551	\$2.8	1,647	582	624	\$945k	\$640k	5		10-20%		5-10%		<5%		<3%
Mossburn ^(M)	3.84%	\$58,973	\$2,262	\$2,755	\$0.3	210	87	97	\$165k	\$20k	5		10-20%	<1%	5-10%	<3%	<5%	<1%	<3%
Edendale ^(U)	3.63%	\$74,241	\$2,697	\$2,884	\$0.7	555	231	253	\$220k	\$67k	5	<1%	10-20%		5-10%	<3%	<5%	<1%	3-5%
Riversdale ^(U)	3.40%	\$63,619	\$2,165	\$2,175	\$0.4	372	159	185	\$200k	\$29k	5		10-20%	<1%	5-10%		<5%		<3%
Waituna ^(R)	3.29%	\$85,416	\$2,808	\$6,595	\$3.1	1,683	612	466	\$1.05m	\$785k	4		<10%		5-10%		<5%		<3%
Waikaia ^(R)	3.15%	\$74,352	\$2,340	\$6,823	\$4.5	1,656	642	663	\$560k	\$220k	5		10-20%		5-10%		<5%		<3%
Te Waewae ^(R)	3.13%	\$65,168	\$2,043	\$4,396	\$2.7	1,380	534	604	\$465k	\$185k	6	1-2%	20-30%	<1%	5-10%		<5%		<3%
Hokonui ^(R)	2.98%	\$87,850	\$2,615	\$5,665	\$5.3	3,087	1,089	939	\$840k	\$275k	4		<10%		5-10%		<5%		<3%
Wallacetown ^(U)	2.89%	\$78,999	\$2,281	\$2,353	\$0.6	663	243	263	\$255k	\$56k	4		10-20%	1-2%	10-15%	<3%	<5%		<3%
Dacre ^(R)	2.53%	\$93,161	\$2,356	\$5,309	\$2.7	1,617	579	504	\$933k	\$535k	4		<10%		5-10%		<5%		<3%
Woodlands ^(U)	2.46%	\$71,918	\$1,769	\$2,789	\$0.3	264	111	111	\$340k	\$80k	4		10-20%		5-10%	<3%	<5%		<3%
Waianiwa ^(R)	2.29%	\$85,748	\$1,966	\$4,617	\$2.9	1,968	711	620	\$603k	\$228k	4		<10%		5-10%		<5%		<3%
Makarewa North ^(R)	1.74%	\$90,727	\$1,579	\$1,780	\$0.2	327	120	129	\$475k	\$170k	2		10-20%		<5%		<5%		
Southland	3.95%	\$70,590	\$2,789	\$4,317	\$54.0	29,613	11,523	12,498	\$365k	\$143k									

1 – These figures have been obtained by calculating the weighted average deprivation score for Statistical Area 1 areas contained within the specified area unit. Note – the [NZDep2018](#) figures are from the December 2019 Interim Research Report.

(U) denotes a mainly urban area; (R) denotes a mainly rural area; (M) denotes a mix of urban and rural areas

Monthly Financial Report - May 2020

Record No: R/20/6/24369
Author: Dee Patel, Project Accountant
Approved by: Anne Robson, Chief Financial Officer

☐ Decision ☐ Recommendation ☒ Information

Summary

1. The purpose of this report is to provide Council with an overview of the financial results to date by the nine activity groups of Council, as well as the financial position, and the statement of cash flows.
2. This report summarises Council's financial results for the eleven months to 31 May 2020.

Recommendation

That the Council:

- a) **Receives the report titled "Monthly Financial Report - May 2020" dated 16 July 2020.**

Attachments

- A Monthly financial report - May 2020 [📄](#)



Monthly Financial Report

May 2020

Southland District Council
Te Rohe Pōtae o Murihiku

PO Box 903
15 Forth Street
Invercargill 9840

☎ 0800 732 732
@ sdc@southlanddc.govt.nz
🏠 southlanddc.govt.nz

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Executive summary

1. This monthly financial report summarises Council's financial results for the eleven months to 31 May 2020.
2. The monthly financial report summary consolidates the business units within each of Council's groups of activities.
3. The monthly financial report includes:
 - year to date (YTD) actuals, which are the actual costs incurred
 - year to date (YTD) projection, which is based on the full year projection and is a combination of the Annual Plan and carry forwards, and forecasting from October and February
 - year to date (YTD) budget, which is based on the full year Annual Plan budget with adjustments for phasing of budgets
 - full year (FY) budget, which is the Annual Plan budget figures
 - full year (FY) projection, which is the Annual Plan budget figures plus the carry forward, and forecast adjustments.
4. Phasing of budgets occurs in the first two months of the financial year, at forecasting and when one-off costs have actually occurred. This should reduce the number of variance explanations due to timing.
5. Where phasing of budgets has not occurred, one twelfth of annual budgeted cost is used to calculate the monthly budget.
6. Southland District Council summary reports use a materiality threshold to measure, monitor and report on financial performance and position of Council. The materiality threshold adopted by Council, together with the annual budget for 2019/2020 is variances more or less than 10% of the original adopted budget and greater than \$10,000 in value.
7. Report contents:
 - A. Council monthly summary
 - B. Council summary report - income and expenditure and commentary
 - C. statement of comprehensive income
 - D. statement of financial position and movement commentary
 - E. statement of cash flows.

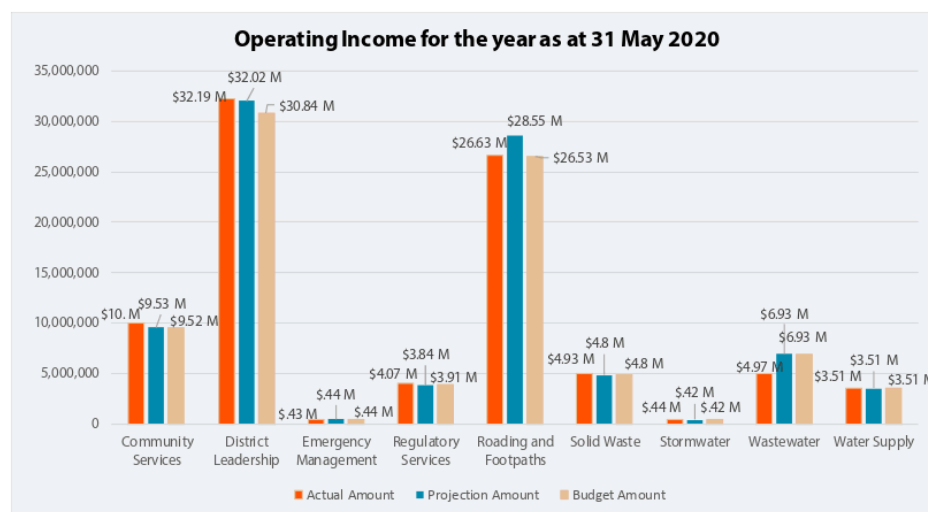
Abbreviation Explanation

Abbreviation	Description
AP	Annual Plan
CAPEX	Capital Expenditure
ELT	Executive Leadership Team
FYB	Full Year Budget
GDC	Gore District Council
GIS	Geographic Information System
GMSE	GeoMedia Smart Client
GST	Goods and Services Tax
ICC	Invercargill City Council
LED	Light Emitting Diode
LTP	Long Term Plan
ME	Month End
NZTA	New Zealand Transport Authority
SDC	Southland District Council
SIESA	Stewart Island Electricity Supply Authority
YE	Year End
YTD	Year To Date
YTD Variance	Comparison of actual results compared to YTD budget
\$M	Millions of dollars

Council monthly summary

Income

Operating income is \$2.9M (3%) under projection YTD (\$87.1M actual vs \$90M projected).

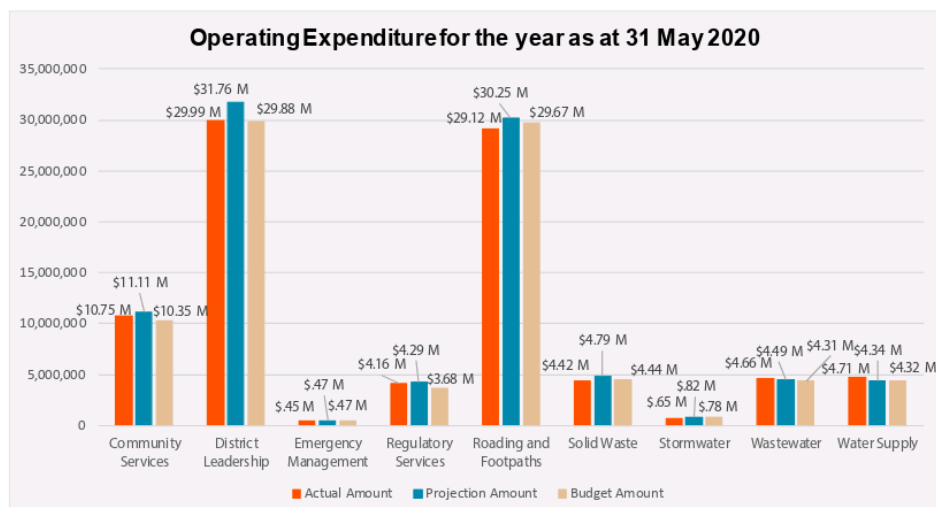


Operating income is under projection due to two main activities being roading and footpaths and wastewater. Roading and footpaths are \$1,912,043 (7%) under projection, due to the timing of works, particularly bridge renewal and emergency works. Transit recoveries is also under projection by \$135K partially due to the timing of invoices generated for work completed.

Wastewater is \$1,961,196 (28%) under projection. This is due to not receiving the second instalment of TIF funding in support of the Te Anau wastewater upgrade which was budgeted for during April, we are now expecting to receive this in June. We are entitled to lodge a claim once we have completed the pipeline.

Expenditure

Operating expenditure is \$3.4M (4%) under projection for the YTD (\$88.9M actual vs \$92.3M projection).

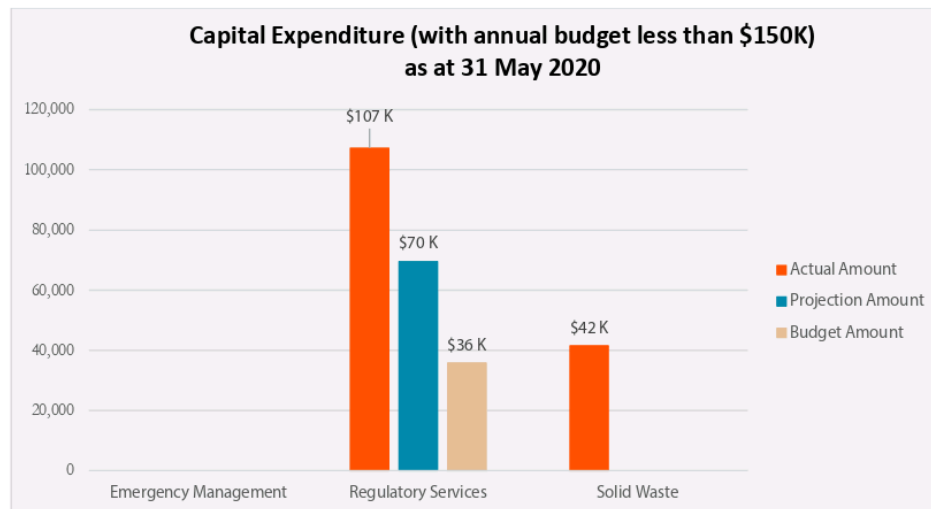


- **Community services** is \$366,546 (3%) under projected spend.
 - **Cemeteries** are \$87,551 (27%) under projection, while most budgets are under spent the largest item is interment costs at \$21,226, due to less internments occurring than budgeted. Also included in this underspend are \$11,500 of new beams which are budgeted under operational expenditure but have been incurred under capital expenditure. Operational maintenance budgets are also underspent and expect to remain so by year end.
 - **Library services** are \$177,221 (11%) under projection. Staff costs are \$64K under due to vacant positions throughout the year and a project to install radio frequency tags onto library books that has been delayed into next year.
 - **Te Anau Airports** \$81,575 (19%) under projection. This is mainly due to non-critical activities associated with CAA compliance being deferred in view of business operations post Covid-19.
- **District leadership** is \$1,772,835 (6%) under projection spend due to the following:
 - **Communications and engagement** is \$118,107 (12%) under projection due to Covid-19 restrictions and projects being postponed. Staff were also unable to go to three conferences and First Edition was not published due to the lockdown. Expenditure for the Southern Field-days is over budget, but this due to some shared costs with Environment Southland that will be recovered. Radio advertising costs are likely to be over budget at year end because of extra radio spending for closures around Covid-19.
 - **Customer service** is \$117,605 (11%) under projection. This relates mainly to staff vacancies and less spent on postage, communication, general projects and travel.
 - **Information management** is \$275,924 (10%) under projection mainly due to positions being vacant during the year, along with lower networking and printing costs.

- **Finance** is \$74K under projection. This is due to staff vacancies and savings on training with staff being unable to attend courses due to covid.
- **People and capability** is \$74,695 (9%) under projection. Full year result is likely to be closer to projection due to additional health and safety and staff costs over the Covid-19 period and recruitment costs and legal costs which are expected.
- **Great South** is \$159,318 (53%) under projection. This projection was estimated back in October and Great South has purchased less services than expected. This was raised through the February forecasting round through a reduction in income for information management.
- **Council and councillors** is \$95,561 (10%) under projection with only 10% of our contribution to the ouvea premix removal being requested so far. Gore District Council is invoicing our share on an as needed basis. Training, strategic retreat costs and donations are all below budget as well.
- **Council elections** is \$40,096 (19%) under projection as the predicted cost of the elections and the four by-elections was lower than anticipated.
- **Forestry** is \$224,842 (11%) under projection due to silviculture activities being deferred due to Covid-19. Some of this underspend will be recovered in the remaining month of the financial year.
- **Roading and footpaths** are \$1,132,379 (4%) under projection spend due to the following:
 - Roothing – district wide administration, is currently \$436K under the projected spend. The majority of this relates to a higher level of staff time that has been recovered from NZTA and is included as a negative expense. \$99K relates to the timing of invoices for our share of costs relating to the Pyramid Bridge renewal, these will be included before the end of the year.
 - Roothing – district wide
 - general maintenance is under projected spend largely due to reduced activity largely due to sealed road maintenance of \$120K
 - emergency reinstatement is \$406,500 under projected spend. This is only used for significant events which is greater than a 1 in 10 year event. The event at the start of February is estimated to cost around \$3 million which will be spent over this year and next year. We have projected to spend \$1.8 million of this in the current year although it is unlikely to be completely spent due to lost time during the Covid-19 pandemic.
 - network and asset management is \$300K under project spend mainly related to the structures professional services and timing of posted bridge inspection, however is likely to be slightly under budget at the end of the year.
 - environmental maintenance continues to remain ahead of budget (\$148K). This covers activities such as ice gritting and snow clearing which can be hard to predict.

Capital expenditure (CAPEX)

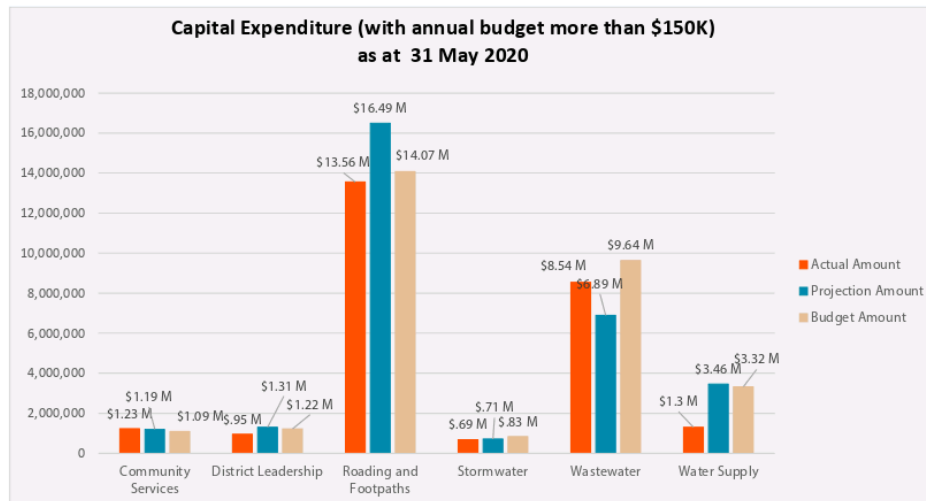
Capital expenditure is \$3.7M (12%) under projection year to date (\$26.4M actual vs \$30.1M projection).



Solid waste is \$41,515 (100%) over projection due to the additional wheelie bins that have been supplied this year.

Regulatory Services is \$37,000 over projection due to the GoGet project being phased to June with costs incurred in May. The project will be completed within budget.

Monthly Financial Report – May 2020



Roading and footpaths are \$2,930,240 (18%) under YTD projection.

- **roading - district wide** is \$2,318,999 (15%) under projection with sealed road levels of service \$210K under projection due to the timing of finalising land legislation of the Alternative Coast Route Project. Council is still waiting on a number of invoices from landowners to finalise this process which is expected to continue into 2020/2021. Sealed road resurfacing is \$588K under projected spend due to a reduced programme as a result of Covid19. Some asphalt resurfacing work is planned for late June which that may utilise some of the budget. Traffic services renewal is \$336K under projected spend, this is largely due to pavement marking which has been impacted by the February floods and again by Covid-19. Provided weather conditions are suitable all attempts will be made to make up for lost time before year end. Minor improvements is \$821K under projected spend due to delays with the seal widening project along Fortrose Otara. This has now been approved with a revised scope and will progress but the bulk of the cost is now likely to be incurred during 2020/2021. The bridge renewal program is \$965K behind forecast mainly due to initial design delays and then Covid19, good progress is now being made on these, but will remain under budget at the end of the year.
- **streetworks** is \$456,743 (53%) under projection which is predominantly made up of three footpath projects that have been delayed with Covid 19. With the move to level 2 contracts have now been awarded for these works.

Water supply is \$2,156,014 (62%) under projection. Investigation was required into service pipes at the same depth as the intended water project and has caused a delay to the expected completion date for Otautau (\$330K under budget) now expected to be 18 July. No work has commenced on the Te Anau Watermain project (\$909K) which will mean a full carry forward to the 2020/2021 financial year. The business case for the multi-year upgrade for additional UV disinfection at Riverton is being worked through, with no physical work being undertaken this year \$250K will be carried forward to 2020/2021. The request for proposal is being drafted for the upgrade to the Manapouri water treatment plant with turbidity being monitored, there will be \$300K carried forward to 2020/2021. The Lumsden watermain project is still on hold and due to commence again in July.

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Council summary report

Southland District Council Financial Summary
for the period ending 31 May 2020

Operating Income									
	YTD					FYB			
	Actual Amount	Projection Amount	Budget Amount	Variance	Var %	Projection Amount	Budget Amount	Variance	Var %
Community Services	9,996,592	9,529,112	9,520,269	467,480	5%	11,328,074	11,649,509	321,435	3%
District Leadership	32,192,586	32,018,047	30,841,613	174,538	1%	34,659,374	33,357,610	(1,301,764)	(4%)
Emergency Management	428,727	441,677	441,677	(12,949)	(3%)	481,829	481,829	0	0%
Regulatory Services	4,073,718	3,835,387	3,906,365	238,332	6%	4,354,889	4,252,521	(102,568)	(2%)
Roading and Footpaths	26,633,410	28,545,454	26,529,980	(1,912,043)	(7%)	31,266,155	29,143,773	(2,122,382)	(7%)
Solid Waste	4,933,770	4,804,085	4,804,085	129,685	3%	5,242,541	5,242,541	0	0%
Stormwater	437,939	415,377	415,377	22,562	5%	508,193	508,192	(1)	(0%)
Wastewater	4,972,701	6,933,896	6,933,896	(1,961,196)	(28%)	7,642,920	7,642,920	0	0%
Water Supply	3,508,031	3,511,750	3,507,167	(3,719)	(0%)	3,888,463	3,888,463	(5,000)	(0%)
Total	\$87,177,474	\$90,034,784	\$86,900,428	(2,857,310)	3%	\$99,372,438	\$96,162,158	(3,210,279)	(3%)
Operating Expenditure									
	YTD					FYB			
	Actual Amount	Projection Amount	Budget Amount	Variance	Var %	Projection Amount	Budget Amount	Variance	Var %
Community Services	10,750,939	11,117,485	10,354,045	(366,546)	(3%)	12,357,580	12,060,483	(297,097)	(2%)
District Leadership	29,988,126	31,760,961	29,877,247	(1,772,835)	(6%)	36,792,832	35,029,140	(1,763,692)	(5%)
Emergency Management	454,335	468,153	468,153	(13,818)	(3%)	481,829	481,829	0	0%
Regulatory Services	4,161,565	4,291,240	3,681,725	(129,676)	(3%)	5,604,795	4,365,134	(1,239,661)	(22%)
Roading and Footpaths	29,118,098	30,250,478	29,671,677	(1,132,379)	(4%)	33,046,410	32,474,106	(572,304)	(2%)
Solid Waste	4,423,005	4,787,357	4,438,156	(364,352)	(8%)	5,222,015	4,841,070	(380,945)	(7%)
Stormwater	653,863	817,855	781,188	(163,992)	(20%)	889,920	849,921	(39,999)	(4%)
Wastewater	4,660,620	4,491,930	4,313,967	168,690	4%	4,890,358	4,696,217	(194,141)	(4%)
Water Supply	4,711,477	4,336,355	4,324,878	375,122	9%	4,730,280	4,717,760	(12,520)	(0%)
Total	\$88,922,028	\$92,321,814	\$87,911,036	(3,399,786)	(4%)	\$104,016,019	\$99,515,660	(4,500,359)	(4%)
Net Surplus/Deficit	(\$1,744,554)	(\$2,287,029)	(\$1,010,608)	542,476	7%	(\$4,643,581)	(\$3,353,501)	1,290,080	1%
Capital Expenditure									
	YTD					FYB			
	Actual Amount	Projection Amount	Budget Amount	Variance	Var %	Projection Amount	Budget Amount	Variance	Var %
Community Services	1,229,450	1,189,798	1,091,069	39,653	3%	1,654,914	2,396,220	741,306	45%
District Leadership	953,204	1,305,639	1,215,717	(352,434)	(27%)	154,189	49,693	(104,496)	(68%)
Emergency Management	-	-	-	0	0%	-	-	0	0%
Regulatory Services	107,214	69,521	35,771	37,693	0%	337,861	132,861	(205,000)	(61%)
Roading and Footpaths	13,558,928	16,489,169	14,073,552	(2,930,241)	(18%)	17,576,293	14,945,146	(2,631,147)	(15%)
Solid Waste	41,515	-	-	41,515	-	-	-	0	-
Stormwater	686,805	706,930	830,604	(20,125)	(3%)	708,833	832,507	123,674	17%
Wastewater	8,539,933	6,893,388	9,636,618	1,646,545	24%	10,739,452	14,560,046	3,820,594	36%
Water Supply	1,299,459	3,455,472	3,322,912	(2,156,014)	(62%)	3,659,132	3,204,787	(454,345)	(12%)
Total	\$26,416,509	\$30,109,917	\$30,206,244	(3,693,408)	(12%)	\$34,830,674	\$36,121,260	1,290,586	4%

The capital expenditure full year budget and projection for district leadership is smaller than the year to date budget and projection due to a budgeted devaluation for forestry assets that is phased to June.

Activities reporting under Groups listed:

COMMUNITY SERVICES	DISTRICT LEADERSHIP	REGULATORY SERVICES
Community Assistance	Representation and Advocacy	Building Control
Parks and Reserves	Community Development	Resource Management
Cemeteries	District Support	Animal Control
Community Facilities	Corporate Support	Environmental Health
Community Groups	Forestry	
Library Services		
Public Toilets		
Airports		
Electricity Supply		

Statement of comprehensive income

Statement of Comprehensive Revenue and Expenses for the period ending 31 May 2020					
	YTD			FYB	
	Actual Amount	Projection Amount	Budget Amount	Projection Amount	Budget Amount
Revenue					
Rates Revenue	44,324,025	44,271,988	44,254,427	48,411,466	48,411,466
Other Revenue	8,499,350	8,248,725	7,926,587	8,716,742	8,372,470
Interest and Dividends	284,528	62,489	62,489	68,170	68,170
NZ Transport Agency Funding	12,469,364	14,356,206	12,340,732	15,270,788	13,129,323
Grants and Subsidies	2,753,293	4,176,244	3,351,244	4,761,011	4,170,975
Other gains/losses	237,908	72,275	42,375	(1,407,317)	(1,447,317)
Development and financial contributions	200,002	14,432	0	363,899	368,155
	68,768,469	71,202,360	67,977,855	76,204,759	73,073,242
Expenditure					
Employee Benefit Expense	12,778,338	13,634,573	12,947,787	13,949,788	13,387,725
Depreciation and Amortisation	21,259,664	21,251,297	21,251,297	23,183,233	23,183,233
Finance Costs	21,000	20,167	20,167	22,000	22,000
Other Council Expenditure	36,454,021	38,583,352	34,769,212	43,693,319	39,833,786
Balance Sheet	0	0	0	0	0
Internal Reconciliations	0	0	0	0	0
	70,513,023	73,489,390	68,988,463	80,848,340	76,426,743
Total Comprehensive Income	(1,744,554)	(2,287,029)	(1,010,608)	(4,643,581)	(3,353,501)

Note:

The revenue and expenditure in the comprehensive income statement does not reconcile to the total income and total expenditure reported in Council summary report on page 10 due to the elimination of the internal transactions. However, the net surplus/deficit (as per Council summary report) matches the total comprehensive income (as per the statement of comprehensive income).

The presentation of the statement of comprehensive income aligns with Council's annual report. The annual report is based on national approved accounting standards. These standards require us to eliminate internal transactions. Council is also required to report by activities. A number of Council functions relate to a number of activities, eg finance. To share these costs, an internal transaction is generated between the finance business unit and the activity business units. Within the annual report, Council also prepare activity funding impact statements. These statements are prepared under the Financial Reporting and Prudence Regulations 2014. This regulation requires internal charges and overheads recovered be disclosed separately. Council summary report is a summary of what these activity funding impact statements will disclose for income and expenditure at year end.

Statement of financial position

Council's financial position as at 31 May 2020 is detailed below. The balance sheet below only includes Southland District Council and SIESA financials. This means that the balance sheet for 30 June 2019 differs from the published annual report which includes Venture Southland financials.

SOUTHLAND DISTRICT COUNCIL STATEMENT OF FINANCIAL POSITION as at 31 May 2020

	Actual 30-May-20	Actual 30-Jun-19
Equity		
Retained Earnings	716,902,900	718,647,453
Asset Revaluation Reserves	822,120,037	822,120,037
Other Reserves	42,546,133	42,546,133
Share Revaluation	2,666,473	2,666,473
	<u>1,584,235,546</u>	<u>1,585,980,097</u>
Represented by:		
Current Assets		
Cash and Cash Equivalents	10,726,661	14,911,330
Trade and Other Receivables	6,828,173	11,123,195
Inventories	129,402	129,402
Other Financial Assets	1,321,489	1,508,271
Property, Plant and Equipment	-	-
	<u>19,005,725</u>	<u>27,672,199</u>
Non-Current Assets		
Property, Plant and Equipment	1,562,771,743	1,556,700,350
Intangible Assets	2,346,142	2,565,313
Forestry Assets	11,900,000	11,900,000
Internal Loans	29,792,691	31,315,988
Work in Progress	76,678	772,054
Investment in Associates	970,321	314,495
Other Financial Assets	302,114	302,608
	<u>1,608,159,689</u>	<u>1,603,870,809</u>
TOTAL ASSETS	<u>1,627,165,414</u>	<u>1,631,543,007</u>
Current Liabilities		
Trade and Other Payables	9,127,270	8,358,955
Contract Retentions and Deposits	559,922	451,905
Employee Benefit Liabilities	1,279,611	1,583,186
Development and Financial Contributions	2,130,212	2,112,712
Borrowings	-	1,700,000
Provisions	14,000	14,000
	<u>13,111,015</u>	<u>14,220,759</u>
Non-Current Liabilities		
Employment Benefit Liabilities	18,010	18,010
Provisions	8,152	8,152
Internal Loans - Liability	29,792,691	31,315,988
	<u>29,818,854</u>	<u>31,342,151</u>
TOTAL LIABILITIES	<u>42,929,868</u>	<u>45,562,909</u>
NET ASSETS	<u>1,584,235,546</u>	<u>1,585,980,097</u>

Statement of cash flows

Statement of Cashflows for the period ended May 2020

	2019/2020 YTD Actual
Cash Flows from Operating Activities	
Receipts from rates	45,130,358
Receipts from other revenue (including NZTA)	26,141,808
Cash receipts from Interest and Dividends	284,528
Payment to Suppliers	(35,059,364)
Payment to Employees	(13,081,913)
Interest Paid	(21,000)
GST General Ledger (net)	768,064
Net Cash Inflow (Outflow) from Operating Activities	24,162,481
Cash Flows from Investing Activities	
Receipts from sale of PPE	237,908
(Increase)/Decrease Other Financial Assets	(468,549)
Purchase of property, plant and equipment	(26,635,681)
Purchase of Forestry Assets	-
Purchase of Intangible Assets	219,172
Net Cash Inflow (Outflow) from Investing Activities	(26,647,150)
Cash Flows from Financing Activities	
Increase/(Decrease) Term Loans	(1,700,000)
Increase/(Decrease) Finance Leases	-
Net Cash Inflow (Outflow) from Financing Activities	(1,700,000)
Net Increase/(Decrease) in Cash and Cash Equivalents	(4,184,669)
Cash and Cash Equivalents at the beginning of the year	14,911,330
Cash and Cash Equivalents at the end of May	10,726,661

Cash and cash equivalents and other financial assets

1. At 31 May 2020, Council had \$5M invested in two term deposits with maturities as shown in the table below. Note: Council is received a lower interest rate of 1.22% for the term deposit invested in May.

SDC Investments - Term Deposits				
Bank	Amount	Interest Rate	Date Invested	Maturity Date
WPC	\$ 3,000,000	1.22%	19-May-20	17-Jul-20
Total	\$ 3,000,000			

2. At 31 May 2020, SIESA had \$1.57M invested in five term deposits as follows:

SIESA Investments - Term Deposits				
Bank	Amount	Interest Rate	Date Invested	Maturity Date
BNZ	\$ 370,000	2.66%	2-Mar-20	3-Aug-20
BNZ	\$ 200,000	2.58%	2-Dec-19	4-May-20
BNZ	\$ 350,000	2.81%	23-Jan-20	23-Jul-20
BNZ	\$ 350,000	3.31%	23-Apr-19	23-Apr-20
BNZ	\$ 300,000	3.23%	6-May-19	6-Jul-20
Total	\$ 1,570,000			

3. Funds on call at 31 May 2020:

Funds on Call				
	Amount	Bank	Account	Interest Rate
SDC	\$ 4,396,614	BNZ	Funds on Call	0.10%
	\$ 10,000	BNZ	Operating Bank Acc	1.00%
	\$ 532,558	BNZ	Restricted Funds Acc	2.90%
SIESA	\$ 181,066	BNZ	Funds on Call	2.90%

Council's Investment and Liability Policy states that Council can invest no more than \$10M with one bank. Investments and funds on call, comply with the SDC Investment Policy.

Management Report

Record No: R/20/6/24370
Author: Steve Ruru, Chief Executive
Approved by: Steve Ruru, Chief Executive

☐ Decision ☐ Recommendation ☒ Information

Chief Executive

Three Waters

1. In late June 2020, the Department of Internal Affairs, advised councils that central government was undertaking a major programme of water service provision reform. In short, government is looking to establish a small number of publicly owned multi-regional entities to take over the delivery of the water services currently delivered by local government.
2. This was not surprising given the number of discussions across the sector that have focussed on rising wastewater standards, ageing infrastructure, the financial challenges on communities due to the Covid-19 crisis, and the CIP shovel-ready infrastructure project process.
3. The government engaged with LGNZ's National Council on this reform programme early on in the lockdown to canvas the sector's likely reaction to the proposal.
4. National Council proposed that LGNZ and SOLGM partner with the government (via a co-design process) to progress development of the policy framework within which the reforms will occur. This will ensure that the voice of communities, alongside the interests and expertise of councils, is reflected in the reform work.
5. That offer was accepted by the Prime Minister at the Central Local Government Forum, and the work has since commenced, the first results of this work being the announcement of the Three Waters Steering Committee.
6. The Steering Committee comprises:
 - **Independent Chair:** Brian Hanna
 - **Local Government:** Rachel Reese, Alex Walker, Bayden Barber, Stuart Crosby, Vaughan Payne, Monique Davidson, Pat Dougherty, Hamish Riach, Steve Ruru, Miriam Taris, Heather Shotter, Alastair Cameron, Craig McIlroy
 - **SOLGM:** Karen Thomas, Kevin Lavery
 - **LGNZ:** Jason Krupp
 - **DIA and advisors:** Paul James (Secretary for Local Government), Allan Prangnell, Richard Ward, Michael Chatterley, Nick Davis, Natalie McClew
 - **Taumata Arowai:** Bill Bayfield
 - **Treasury:** Morgan Dryburgh
7. A critical condition for LGNZ National Council was that choice is retained in the system. Put simply, whatever the outcome from the policy development process, each council must be free to

choose how it meets the new drinking and wastewater standards – i.e. ‘opt in’ to the model offered, or by other means. That has been incorporated into the reform programme with local authorities being given the opportunity to ‘opt-in’ over the next three years. At the opt-in point local authorities will be able to access a level of stimulus funding to assist with renewal and other capital works required to upgrade water, wastewater or stormwater systems.

8. A series of national workshops are being held in late July with one being held in Invercargill on the 30th July, to explain the reform programme and the requirements for local authorities to be able to access the first round of stimulus funding. This includes the execution of a non-binding Memorandum of Understanding between the Crown and the relevant local authority.
9. The policy work required to design the new entities and create the framework within which they would operate has commenced and will be progressed over the next three years. A series of joint government and local government working groups will be established to assist with this work.
10. The Ministry for the Environment is also continuing its work with the development of a proposed new National Environmental Standard for wastewater discharges and overflows, as signalled in the Action for Healthy Waterways discussion document last year.
11. To support this work Boffa Miskell, GHD and BECA have been employed to develop a report documenting current and emerging issues facing the wastewater sector in New Zealand, covering issues such as trade waste practices, climate change considerations, iwi/Māori values and land-based disposal.

Covid-19

12. At the beginning of July central Government announced how the \$3 billion infrastructure fund in the Covid Response and Recovery Fund will be allocated across regions. The Southland region is to receive \$90 million with the first \$10 million being allocated to the Invercargill CBD project. Decisions on other projects that are to be supported across the Southland region will be made in coming weeks.
13. At a national level the package announced about \$210 million for climate resilience and flood protection projects, \$155 million for transformative energy projects, about \$180 million for large-scale construction projects and \$50 million for enhanced regional digital connectivity. Further detail on the projects that have been approved in this initiate stage are available on the beehive website (<https://www.beehive.govt.nz/release/infrastructure-investment-create-jobs-kick-start-covid-rebuild>).
14. The Covid-19 Recovery (Fast-track Consenting) Bill has been introduced to parliament and referred to select committee with a short ‘turn around’ for public submissions. The bill will provide the Government with new, temporary (two years) powers to fast-track resource consenting and designation processes for specified development and infrastructure projects.
15. The Bill enables two categories of projects, being the 17 specific projects listed in schedule 2 of the Bill or projects that are referred via an order in Council/Ministerial approval process, to have access to the fast-track consenting and designation. The Environmental Protection Agency will have responsibility for coordinating the processing of these resource consents.

16. As previously reported the Ministry of Social Development is reporting weekly updates on changes in job seeker support benefit numbers. As at 26 June the Southland region was at 5.1% of the working age population, which has increased from 4% at the start of January 2020. This equates to an increase of 652 individuals. These numbers exclude migrant workers who are not eligible for jobseeker support.
17. A Local Government Recovery Reference Group has been established to provide advice and input to Government on the shaping of the central government recovery programme and ensure that it can link in with local initiatives. One of the challenges has been the fact that central Government has been moving at speed given the pending national election cycle.
18. Due to the additional pressures created as a result of Covid-19 a decision has been made, subject to the passing of legislation by parliament, to extend the normal four month statutory timeframes for adoption of local authority annual reports by a further two months. This means that all local authorities will now need to have their annual report completed by 31 December, rather than the end of October.
19. Traditionally, Council has aimed to have its report adopted by the end of September. It has become clear, however, that the auditors are not able to support this timetable this year due to the impacts of Covid-19 on workforce supply. Staff will keep Council updated on the expected reporting timeline once further information becomes available from Audit NZ.

Conflicts of Interest

20. The Office of the Auditor General (OAG) has recently released a report, **Managing conflicts of interest: A guide for the public sector**, which provides updated guidance on the management of conflicts of interest. A copy of the report is available on the OAG website (<https://oag.parliament.nz/2020/conflicts/docs/conflicts-of-interest.pdf>).
21. In parallel with the general public sector conflicts guide the OAG has also recently released an updated guide on the management of conflicts within a local government context and in particular the Local Authorities Members (Interests) Act 1968. The guide titled Local Authorities (Members' Interests) Act 1968: A guide for members of local authorities on managing financial conflicts of interest is also available on the OAG website (<https://oag.parliament.nz/2020/lamia>).
22. I would encourage elected members to read both guides as they provide useful guidance on how to manage conflicts and in particular the approach that is being adopted by the OAG that has specific legislative powers to enforce the required standards in this area.

People and Capability

23. Health, Safety and wellness continues to be a focus within Council. The draft Health and Safety Plan for 2020/2021 was approved by the Finance and Assurance meeting in June and will be presented to Council in July 2020. Key areas of focus for 2020 and 2021 include complete implementation of the health, safety and wellbeing training, finalisation of the serious mental harm critical risk control plan, continued work on critical risks and develop an action plan following the external gap analysis undertaken in June.

Environmental Services

Group Managers Update

24. Council received the following thank you from Rakiura Heritage Trust regarding our museum activities. The value of the museum programme being clearly illustrated by the below comments.

“The Rakiura Heritage Trustees wish to express their gratitude and appreciation for the professional services provided by Roving Museums Officer as we confront the complicated process of shifting our Collection from the old museum to the new one. We are also grateful to the Southland District Council for funding the services which Roving Museums Officer provides. The meticulous planning, preparation and communication to us of the issues involved have made this huge task much less daunting for us. The Roving Museums Officer has spent long hours sorting, packing and labelling many of the most fragile items in the Collection. Her comprehensive knowledge of our Collection and of issues relating to local history are contributing in a most valuable way to the interpretation and presentation of topics in the new exhibition. We are conscious that this work involves regular, long periods away from her own home and her own life and we appreciate the sacrifices she makes on our behalf. On a personal note, I am most grateful for the support and advice provided to me as I work my way through a Museums study course. As a rank amateur, I have had much to learn and the Roving Museums Officer has made the process effective and enjoyable. Sincerely. (Raylene Waddell, Minutes Secretary, Rakiura Heritage Trust)”

Environmental Health and Animal Control

25. June is the busiest time of year for dog control, with dogs needing to be re-registered by 1 July. Along with a strong focus on encouraging dog owners to register online, another focus this year is ensuring that new dogs are classed correctly first time; for example ensuring working dogs meet the legal definition of working dogs.
26. The environmental health officers are focussing on the implementation of the new Datacom software that will enable food business verifications to be completed on a tablet. The new software can sync with Council’s processing systems, and also can upload verification data to the Ministry for Primary Industries.

Resource Management

27. Covid-19 has not noticeably affected incoming workloads. Incoming resource consent applications remain consistent with the same period in 2019 and if anything the volume of incoming building consents and customer enquiries have increased during and after lockdown. There has also been a vacancy within the team which has impacted on getting consents issued within timeframes.
28. Dark Skies Plan Change for Rakiura – The decision on the Council initiated plan change has been finalised by the committee and the decision will be released in the next few weeks. The decision is subject to appeal, if no appeals are received the plan change will be made operative by Council and the rules will have legal effect.
29. Up until the alert level 4 restrictions coming into force, ongoing policy focused work was occurring on the regional work streams for Climate Change, Biodiversity, Landscapes and Natural Character. It is unclear in a national space what impact the Covid-19 pandemic will have on anticipated national direction as government was signalling significant changes were going to

be gazetted prior to the election. It is expected that the national policy statements on urban development and highly productive land will progress before the election. The majority of Council's policy work in this space still needs to progress due to it already being a legislative requirement but the timeframe to deliver may vary.

30. Council has endorsed a report to bring forward the review of the landscapes section of the District Plan. Work is now underway to understand the unique nature of Southland's landscapes, cultural values and local areas of significance. There are a number of pieces of work that will inform a review and also a number of conversations with communities and land owners. It is anticipated that a plan change will be notified in the middle of 2021.
31. Council was part of the territorial authority reference group providing feedback to the Ministry of the Environment on the proposed National Policy Statement on Indigenous Biodiversity and the proposed New Zealand Biodiversity Strategy.
32. Consultation on the NPS for Indigenous Biodiversity closed in March 2020. Council submitted stating that in Council's opinion, achieving the requirements of the statement will require a significant body of work identifying potentially Significant Natural Areas, mapping them and revising rules within the District Plan to protect and enhance them. It is anticipated that there will be a significant cost associated with this work. There is estimated to be 1.7 million hectares of potentially significant biodiversity which equates to 57% of our district. Approximately, 94,000ha of this area is indicated to be on private land. Council has provided input into the LGNZ submission and SDC is one of the case study councils forming part of that submission. It was anticipated that the National Policy Statement will likely be gazetted prior to the general election in September but this has been delayed until approximately February 2021.
33. Resource consent data for previous few months:
 - April - 27 applications received, 15 decisions issued.
 - May – 28 applications received, 16 decisions issued.
 - June – 22 applications received, 26 decisions issued.

Community and Futures

Strategy and Policy

34. The Speed Limits Bylaw was adopted by Council at its 23 June 2020 meeting. Implementation of the bylaw will occur in August 2020. Council also discussed and adopted the top 10 strategic risks for Council, effective 1 July 2020.
35. Council have finished formal consultation on the draft Keeping of Animals, Poultry and Bees Bylaw. Submissions will be presented to Council on 27 August 2020.
36. Council are still reviewing the charging method for commercial jetty usage on Stewart Island/Rakiura. Options on how commercial users could be charged, are likely to be presented to the Services and Assets Committee in September. Staff are working on the asset management, risk management and community assistance policies.

- 37. The Annual Plan 2020/2021 was adopted by Council at their meeting on 23 June 2020. The online version is now available on the website with the printed version to follow shortly.
- 38. The Annual Report period is now underway and due to be completed by 21 October 2020.
- 39. The Long Term Plan is entering the final year of the process. First drafts of the activity management plans are due for completion at the end of June and key documents, the draft infrastructure and financial strategies are currently being developed and intended to have initial discussions with Council in August 2020. The long term plan process will continue to ramp up over the next six months as all the pieces come together to produce the draft Long Term Plan and consultation document in time for public consultation in March 2021.

Community Leadership

Community Partnership Fund

- 40. The Community Partnership Fund for each of Council's nine community boards opened on 1 July 2020. All boards have set their own criteria and closing dates with some opting to have multiple funding rounds and others choosing just one.
- 41. At the time of preparing this update, the application forms were in the process of being finalised and will be available online under the community board pages on Council's website with hard copy forms being available from Council offices. Staff are also in the process of finalising the launch of this fund on Council's website, Facebook page and our community board Facebook pages.
- 42. Several of our boards have held (or are in the process of holding) meetings with their community to launch the fund locally. These meetings have been met with a positive response from our communities and have been well attended.

District Initiatives Fund

- 43. As part of the funding review process where it was decided to disestablish the Community Initiatives Fund and create the Community Partnership Fund (which is to be administered by Council's nine community boards), a separate fund is also being retained for District wide initiatives to be allocated by the Community and Strategy Committee. The committee recently approved the criteria for this fund, the purpose of which is to support the development and implementation of initiatives within the Southland District area that are at a scale that provides benefit to the District as a whole or are of benefit to at least two community board areas. The first round closes on 30 September 2020 and the second on 31 March 2021. The total amount available for distribution over two funding rounds is \$38,080 per annum.

Stewart Island Future Opportunities

- 44. Covid-19 has significantly changed things for the project and the Future Rakiura Group. As a community-led project they have reoriented their plans to rethink its kaupapa and respond to the new challenges and opportunities facing the island.
- 45. They have conducted a community survey, receiving 91 responses about how the community fared during Alert Level 4, and ideas for the future of Stewart Island/Rakiura. The results will be used to bring stakeholders and the wider community together to develop a Restart Rakiura Plan.

46. Future Rakiura plans to:
- develop a summary of survey results and report them back to the Stewart Island community via various mediums
 - present the survey results to the community board, Stewart Island Promotion Association, and other interested groups to seek commitment to work jointly on the development of a collaborative Restart Rakiura Plan
 - co-host a community workshop to engage the wider community in a planning conversation about priorities and actions for the Restart Rakiura Plan
 - develop a job description and seek funding to employ a Restart Rakiura Co-ordinator based on the Island
 - become an Incorporated Society – Future Rakiura is currently working on writing their constitution.

Services and Assets

Group Managers Update

47. The Group has been very busy managing the development of Activity Management Plans and LTP 2021 budgets and works programme in amongst business as usual activities. The importance of this work is critical in setting the direction for the Group and wider organisation as we work towards the development of a robust Long Term Plan and associated consultation process.
48. As part of the activity management plan and works programme development process, activity managers will be reconnecting with each of the nine community boards to discuss their locally funded activities and priorities. These discussions will be occurring in September as a follow up to the activity workshops run in May and June. These sessions also provide another opportunity for Community Boards to raise any additional priorities / projects for integration into the 10-year works programme.
49. The 30-year Infrastructure Strategy is nearing completion and is planned to be presented to Council for review and approval in the coming months alongside the Activity Management Plans and LTP budgets. There has been a focus on ensuring strong and clear connectivity between these work streams.
50. Another area of focus is closing out and finalising the capital works programme for the previous financial year and confirming the works programme for the new financial year. The team is confident in their ability to deliver the scope and scale of this programme.

Stewart Island Electrical Supply Authority (SIESA)

51. Replacement alternator for generator unit five has been received on Stewart Island and installed.
52. In late May, the radiator for generator unit one suffered a fault. It is not considered economic to repair or replace the radiator for this unit. However, the generator itself remains serviceable as a backup to the more efficient generator units and PowerNet recommends transferring the radiator

from unit two to unit one to enable continuation of this backup capacity. This work has been authorised to proceed under the existing PowerNet management and service agreement.

53. A proposal for replacement of generator three has been requested from PowerNet. In practice, this would be installed in the location of unit two so that each main unit is housed in a separate room. Together with existing units four and five, this would complete consolidation of generator assets to three units, in line with the activity management strategy. Unit one would operate as a surplus back-up for as long as it remains economically serviceable.
54. Two negotiation meetings have been held with PowerNet with two more planned to produce a renewed SIESA management and operations contract.
55. Roaring 40s has been engaged for pre-delivery scope of the Stewart Island Wind Power project and a kick-off workshop was held in June. Initial work on establishing land access has commenced.

Forestry (IFS)

56. Forestry services are not considered an essential service. As such, the maintenance of Council's forestry portfolio was put on hold through the Covid-19 lockdown period. Under alert level 3 and 2, onsite operations have resumed. The bulk of pruning and thinning operations in Gowan Hills that were deferred due to Covid-19 were completed before the end of June. Planned planting operations in Waikaia were also completed before the end of the financial year.
57. Harvesting operations in Waikaia are planned for the month of July and have a forecasted return of \$932k.

Around the Mountains Cycle Trail

58. Two applications have been approved by MBIE which cover funding of repairs relating to the February flood event (\$379,793) and funding of the cycle trail manager position (\$45,000).
59. The contract for repairs to the trail, associated with the February flood event, is currently being tendered. A specialist cycle trail engineering consultant is engaged for delivery of this construction scope and planned completion is October 2020 to coincide with the new cycle trail season.

Te Anau Manapouri Airport

60. Following the impact of Covid-19, regularly scheduled flights, including larger tourist flights, remain interrupted.
61. A consultant has prepared a 10 year maintenance works programme which indicates \$1.3 million of pavement rehabilitation capital spending need over financial years 21/22 and 22/23.
62. Maintenance spending need of \$192,000 is indicated for the 20/21 year and includes items such as patch repairs and crack sealing.

Property

63. Operating back to normal with staff primarily working from the office.
64. Ongoing and constant workload of numerous actions in regards to tenancies/leases as well as queries and advice from ratepayers elected representatives and other staff.
65. Property disposals of the Ohai bowling club building and the Hokonui hall properties are underway as well as an agreement for the disposal of the former Stewart Island museum imminent. Finalising the updated landowner consents for the coastal route boundary adjustments and payment of compensations is also almost complete. Once this is done the legalisation Gazette Notice can be issued.

Strategic Water and Waste

Te Anau Wastewater Discharge Project

66. Following Council resolutions from 23 October 2018 meeting, when it was resolved to proceed with a sub-surface drip irrigation as disposal route, staff have been progressing work on a number of fronts including development of resource consents for the sub-surface drip irrigation field, as well as advancing towards a detailed design.
67. The contract for the pipeline element has now been awarded to Fulton Hogan with physical work under way in late August/early September to date over 4km of pipe has been laid.
68. Work is also continuing on detailed design of MF plant and SDI field following Council approval to award contracts to Downer and Fulton Hogan respectively. These designs will undergo further value engineering to further optimise scope.

Land and Water Plan Implementation

69. Environment Southland released their proposed Land and Water Plan in 2017.
70. In total 25 appeals were received by Environment Southland of which Council has identified 10, which it will join as a Section 274 party. Council has also lodged an appeal to the decision. The basis of Council's appeal, is largely around the 'non-complying' activity status on wastewater discharges to water. The latest direction issued from the Environment Court outlines a proposed path, where appeals to objectives will be heard ahead of mediation, by grouped topic on policies and rules. Evidence in support of the appeals have been filed with the Environment Court.
71. Interim decisions were released by the Environment Court in late December with a recommendation that further expert conferencing be undertaken in early 2019. A pre-conferencing hearing was held in Invercargill on 10 February after which further detail and information will be released by the Court.
72. A further hearing was held in mid-June 2020 where evidence was presented on additional information that the courts required Environment Southland to provide based on their interpretation of a number of key principals underpinning the plan. Decisions following the hearing are expected mid-July.

Project Delivery Team

- 73. Planning is well underway for the new 20/21 works programme and plans and forecasting being prepared.
- 74. Te Anau Wastewater (TAWW) project is nearly ready for contract award with the final contract conditions being worked through on both packages – aim is for award letters to go out 8 July.
- 75. The bridge works programme is progressing very well.
- 76. The next wave of projects is also due to start with regional footpaths, pond fencing and Te Anau watermain renewals all starting in July.
- 77. Final claims are being worked through with the Covid-19 shutdown and are on track to be resolved, other than the Downer roading contract which is being worked through.
- 78. Internal core improvement project still progressing but a big push in August.

Community Facilities

- 79. The community facilities team are now focused on the end of financial year wrap up and at the same time transitioning into the new year's operations and project delivery.
- 80. The team and the contract's delivery team have reached a milestone in signing a new contract for the delivery of the cleaning services across Council's offices and libraries. The tenders for the moving in the three western Southland community board areas have been let and direct negotiations have started with incumbent contractors.
- 81. This is the culmination of a big piece of work under the guise of the Section 17A review for community facilities which also includes the mowing and gardening contracts.
- 82. Activity management planning is progressing with the draft plans due to be completed by the end of June. Financial planning is well under way with the data needing to be entered into the budget application so it can be included in the AMP's.

Strategic Transport

National Land Transport Plan

- 83. A key focus area for the transport team has been the ongoing development and refinement of Activity Management Plans which includes engagement with NZ Transport Agency on future funding requirements. This has also included reviewing and agreeing Council's road hierarchy alignment with NZ Transport Agency once network road classification.
- 84. The team is still waiting on the release of the final Government Policy Statement on land transport 2021 (GPS) to ensure activity plans and funding requests align with the GPS strategic direction.

District Wide Roding Programme

- 85. The road design for the District wide pavement rehabilitation programme for 2020/21 season is currently being completed with the first tender on track for being released to market in July.

- 86. The resurfacing contract for the next three rehabilitation projects is out to market and closes in early July with the aim of having evaluation completed by the end of July.
- 87. The work involved in the contracts includes; texturising of pre seal patching, supply and spraying of bitumen, supplying, placement and rolling of sealing chips and pavement marking.
- 88. The team have also been carrying out the necessary preparation work for the implementation of the new speed limits across the district following the adoption of the speed limit bylaw by Council in June.

Customer Delivery

Group Manager's Update

- 89. The change to Alert Level 1 sees a significant return to the usual level of business for many of our activities. We welcomed Sandra McLean, customer support manager, to the team and launched a new online lodgement tool for request for service via our website and mobile phones. Without any marketing, we have seen the community adopt the tool and over 10% of requests came via mobile phones. This complements the other support alternatives we have available to customers.

Customer Support

- 90. The past month has been particularly busy in the customer support team due to annual dog registration commencing in the middle of June.
- 91. To date 7,558 dogs have been registered with 4,302 still to go. The impact is spread across reception and the phones. The busiest day was 22 June with 286 calls, however there has been a significant reduction in the number of calls over the past few days. We are expecting another rush around 20 July and the end of the month, prior to the penalty being added. Pleasingly over 70% of renewal registrations have been completed online, however there continues to be a lot of work around maintenance of existing dogs and new dog online registrations.

Libraries

- 92. Alert level 1 has seen a return to business as usual within our library service. We have returned to our regular scheduled programming and services and have also continued to incorporate a home delivery and call and collect option from some of our branches to help provide additional service to those in our community that needs it. School holidays are in full swing and our holiday programme has already been popular. Staff have been very busy with this year's dog registration process, the online applications being welcomed by some customers, and a source of frustration for others who have experienced issues.

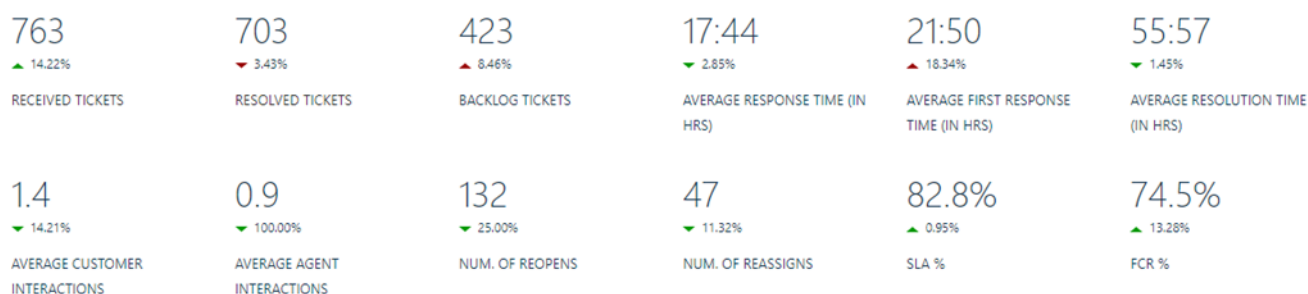
Knowledge Management

- 93. Over the month of June the team lodged 25 LIM applications and issued 17. LIM numbers continue to be lower than the previous financial year (40 lodged and 37 issued in June 2019). Property file requests continue to be high with 162 requests processed in June. The team is busy

with a number of projects including completing the classification review across council and Pathway/RM8 integration.

Business Solutions

94. June was another high month for help desk tickets as the team continuing to support staff in a new mixed working environment. June overdue tickets remained below 100 for the second month.



95. The team continues working on several projects to prepare us for moving to a more modern working environment and providing more online services for our customers. Some of the current projects are:
96. The GoGet project has successfully been completed and moved to business as usual. There are still a few minor changes that we need to make to get the most from the software.
97. Deployment of new laptops continues in June with the team assigning three days a week to set up each device with the new user's previous data and profile information and deploy. This has been slower than anticipated due to staff resource the issue.
98. The team have successfully migrated the Pathway server from ICC to SDC with minimal downtime. Due to significant amount of planning and testing that the project team undertook, there was no impact on staff when they started using the new server. The next step for this team is to upgrade our Pathways software to the latest version, and then implement the new UX interface.
99. The pathway server move now allows us to deploy the RM8 – Pathway integrations that we built earlier in the year. This work is planned for July.
100. The team is also determining what new technology is needed at the new Don Street sites and how we can easily migrate staff to these sites. We have also started planning for how we can easily support a multi-site operation.

Recommendation

That the Council:

- a) **Receives the report titled "Management Report" dated 16 July 2020.**

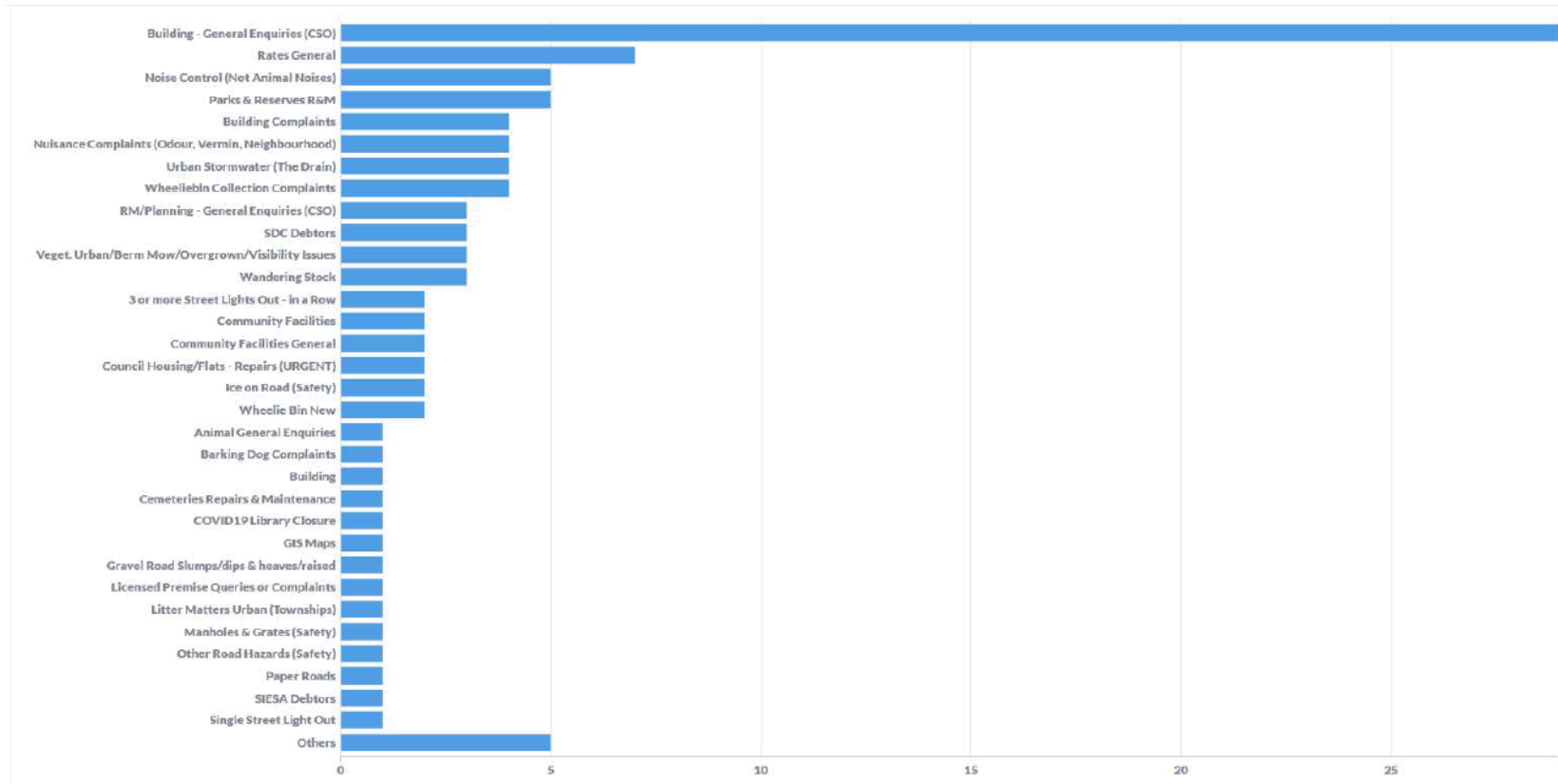
Attachments

- A Graph showing outstanding RFS to end of June 2020 [📄](#)



Outstanding Requests for Service by Activity

To end of June 2020



Earthquake Prone Building Consultation

Record No: R/20/7/27262
Author: Julie Conradi, Manager Building Solutions
Approved by: Fran Mikulicic, Group Manager Environmental Services

☒ Decision

☐ Recommendation

☐ Information

Purpose

- 1 The purpose of this report is to seek consensus from Council to undertake public consultation on earthquake-prone buildings that may pose high risk to life and safety.
- 2 Request that the attached draft example Statement of Proposal be accepted in principle and be approved prior to consultation commencing. (Refer Attachment A).
- 3 Agrees that the consultation commences 10 August 2020 and closes on 30 October 2020.

Executive Summary

- 4 The system for identifying and managing earthquake-prone buildings changed on 1 July 2017. The new system prioritises identification and remediation of earthquake-prone buildings that either pose a high risk to life, safety or are critical to recovery in an emergency.
- 5 Certain hospital, emergency, and education buildings that are earthquake prone will be 'priority buildings'. Other earthquake-prone buildings may be priority buildings due to their location and the potential impact of their failure in an earthquake on people.
- 6 These buildings must be identified with community input and in accordance with section 133AF(2)(a) of the Building Act 2004, which requires Southland District Council to use the special consultative procedure in section 83 of the Local Government Act 2002. Council must identify potentially earthquake-prone buildings by 01 July 2022 in medium seismic risk areas. (Refer Attachment B and C)
- 7 To help determine which buildings may be priority buildings, Southland District Council have identified possible earthquake prone buildings and thoroughfares in five areas that may have sufficient vehicular or pedestrian traffic to warrant prioritisation if parts of unreinforced masonry (URM) buildings were to fall onto them in an earthquake.¹⁴
- 8 The five consultation areas are; Otautau, Riverton, Tuatapere, Wyndham and Winton.
- 9 Priority buildings must be identified and remediated in half the usual time, (12.5 years) to reduce the risks to life safety more promptly. Earthquake-prone buildings in medium seismic risk areas that are not priority buildings have 25 years to carry out these works.

¹⁴ An unreinforced masonry (URM) building has masonry walls that do not contain steel, timber or fibre reinforcement. URM buildings are older buildings that often have parapets, as well as verandas, balconies, decorative ornaments, chimneys and signs attached to their facades (front walls that face onto a street or open space).

Recommendation

That the Council:

- a) **Receives the report titled “Earthquake Prone Building Consultation” dated 17 July 2020.**
- b) **Determines that this matter or decision be recognised as not significant in terms of Section 76 of the Local Government Act 2002.**
- c) **Determines that it has complied with the decision-making provisions of the Local Government Act 2002 to the extent necessary in relation to this decision; and in accordance with Section 79 of the act determines that it does not require further information, further assessment of options or further analysis of costs and benefits or advantages and disadvantages prior to making a decision on this matter.**
- d) **Agrees to the draft statement of proposal in principle and recommends the consultation on Earthquake-Prone Buildings commences 10 August 2020 and Closes on 30 October 2020.**

Background

- 10 The system for identifying and managing earthquake-prone buildings changed on 1 July 2017 and the deadline for Council to identify Priority buildings in the medium seismic risk area is 01 July 2022.
- 11 The statement of Proposal has been presented to the Executive Leadership Team in March 2020, and the Regulatory and Consents Committee on 11 June 2020 along with a verbal presentation and an opportunity to ask questions. They accepted the draft statement of proposal in principle and recommended to Council the consultation on Earthquake Prone Building’s occurs and that transport routes of strategic importance are not required as alternative routes are available.
- 12 The Regulatory and Consents Committee have requested a letter to building owners is sent prior to the consultation taking place.
- 13 The communication team have drafted a communications engagement plan for EPB consultation 2020. (Attachment D).

Issues

- 14 Council needs to consider whether it is comfortable with the proposed earthquake-prone building consultation occurring as outlined in the attachments and that this occurs so close after the Covid-19 lockdown period. There is a legal requirement to carry out consultation and this must occur with sufficient time to allow the identification of priority buildings before July 2022. An engineering assessment needs to be carried out within this timeframe and it is a requirement of the legislation that property owners be given 12 months to obtain the report and provide this to Council. Council must have sufficient time to evaluate the report and make a final decision on the category of building prior to the July 2022 deadline. Any identified priority earthquake-prone buildings in the medium seismic area must be published and available for our community by July 2022.

- 15 Therefore, although the timeframe appears to be a long way off, there are many stages required to establish which buildings will be classed as priority buildings under the Ministry of Business Innovation and Employment criteria, so the sooner we get on and start this process the better.

Factors to Consider

Legal and Statutory Requirements

- 16 Council is legally required to undertake this consultation in accordance with section 133AF(2)(a) of the Building Act 2004, and section 83 of the Local Government Act 2002.

Community Views

- 17 This consultation is intended to obtain community views on earthquake-prone buildings and thoroughfares.

Costs and Funding

- 18 The Building Solutions team will absorb the administrative cost of this consultation process. This includes minor costs associated with publicising the consultation.

Policy Implications

- 19 There are no anticipated policy implications

Analysis

Options Considered

The options for consideration are when the consultation will take place. Failing to meet section 133AF(2)(a) of the Building Act 2004 is not a viable option.

Analysis of Options

Option 1 – No Consultation

<i>Advantages</i>	<i>Disadvantages</i>
<ul style="list-style-type: none">• None	<ul style="list-style-type: none">• Southland District Council would not fulfil its obligation to administer section 133AF(2)(a) of the Building Act 2004.

Option 2 – Continue the consultation commencing 10 August 2020

<i>Advantages</i>	<i>Disadvantages</i>
<ul style="list-style-type: none">• Building owners will have all the information about their buildings sooner and can make informed decisions.• Reasonable time for Council to meet their July 2022 deadline.	<ul style="list-style-type: none">• People may be financially stressed already due to the fallout from Covid-19 and the outcomes from this consultation may add to that stress.

Option 3 – Push back the Consultation until Early 2021

<i>Advantages</i>	<i>Disadvantages</i>
<ul style="list-style-type: none">• Further out from the initial Covid -19 Impact which may result in an upturn in the economy and. less pressure on building owners	<ul style="list-style-type: none">• Owners have to deal with the uncertainty around their possible earthquake-prone buildings for longer• Meeting the deadline of July 2022 would be marginal given the 1 year timeframe for owners to provide Engineers Reports.

Assessment of Significance

- 20 Under Councils Significance and Engagement Policy, this is not considered to be significant.

Recommended Option

- 21 Option 2 - Continue the consultation commencing 10 August 2020.

Next Steps

- 22 Once agreement is reached the engagement plan, documents, online questioner etc. will be finalised.
- 23 As requested by Regulatory on 11 June 2020 all known affected property owners will be advised in writing the consultation is going to be undertaken.
- 24 The consultation will then commence as per the communications and engagement plan for the EPB consultation 2020.

Attachments

- A Attachment A Draft Statement of Proposal for Council Meeting 22 July 2020 [↓](#)
- B Attachment B Seismic Risk areas for Council Meeting 22 July 2020 [↓](#)
- C Attachment C Seismic Risk Areas Southland District for Council Meeting 22 July 2020 [↓](#)
- D Attachment D Draft Engagement Plan - Earthquake-prone buildings 22 07 2020 [↓](#)

Earthquake Prone Buildings 2020 - Statement of Proposal

Consultation on vehicular and pedestrian thoroughfares with sufficient traffic to warrant prioritisation – **EXAMPLE Otautau**

1. Introduction

The system for identifying and managing earthquake-prone buildings changed on 1 July 2017, when the Building (Earthquake-Prone Buildings) Amendment Act 2016 came into force to create Subpart 6A of Part 2 of the Building Act 2004. The new system ensures the way our buildings are managed for future earthquakes is consistent across the country, and provides more information for people using buildings. There are new requirements, powers and timeframes to address earthquake-prone buildings.

The new system prioritises identification and remediation of earthquake-prone buildings that either pose a high risk to life safety or are critical to recovery in an emergency. Certain hospital, emergency, and education buildings that are earthquake prone will be classified as 'priority buildings.' Other earthquake-prone buildings may be priority buildings because of their location and the potential impact on people if they failed in an earthquake. These buildings must be identified with community input. Priority buildings must be identified and remediated in half the usual time to reduce the risks to life safety more promptly.

Southland District Council seeks your feedback on proposals for roads, footpaths and other thoroughfares that should be prioritised. Council also seeks your views on whether there are any other thoroughfares that should be included.

2. New system for managing earthquake-prone buildings

The Building (Earthquake-Prone Buildings) Amendment Act 2016 came into force on 1 July 2017. It changes the current system for identifying and remediating earthquake-prone buildings.

The new system ensures the way our buildings are managed for future earthquakes is consistent across the country and provides more information for people using buildings, such as notices on earthquake-prone buildings, and a public register. Owners of earthquake-prone buildings will be required to take action within certain timeframes depending on the seismic risk area their building is located in. Affected owners will be contacted by Southland District Council.

The seismic hazard factor (or 'z' factor) has located **Otautau** within a medium seismic risk area. This means Southland District Council must identify potentially earthquake-prone buildings in this area within 10 years, and building owners must strengthen or demolish earthquake-prone buildings within 25 years¹ unless categorised as a 'priority building'.

More information about the new system can be found at: <https://www.building.govt.nz/managing-buildings/managing-earthquake-prone-buildings/>.

'Priority buildings' pose a high risk to life safety, or are critical to recovery in an emergency

The new system prioritises identification and remediation to earthquake-prone buildings that either pose a high risk to life safety, or are critical to recovery in an emergency. These buildings are called

¹ From the date the earthquake-prone building notice is issued.



'priority buildings'. Priority buildings must be identified and remediated in half the timeframe allowed for other earthquake-prone buildings to reduce the risks to life safety more promptly.

This means Southland District Council must identify potentially earthquake-prone 'priority' buildings in Otautau within five years, and building owners must strengthen or demolish earthquake-prone buildings within 12.5 years².

Certain hospital, emergency, and education buildings that are earthquake-prone are likely to be priority buildings. Some other buildings may also be priority buildings due to their location and the potential impact of their failure in an earthquake on people.

Further guidance on priority buildings is available at:

<https://www.building.govt.nz/managingbuildings/managing-earthquake-prone-buildings/resources>.

3. Reason for the proposal

To determine which other buildings may be priority buildings, Southland District Council must identify thoroughfares that have unreinforced masonry (URM) buildings and sufficient vehicular or pedestrian traffic to warrant prioritisation if parts of URM buildings were to fall onto them in an earthquake³.

Your views on the acceptable level of risk for these buildings when considering their uses will inform Council's decision on which thoroughfares (if any) to prioritise.

This consultation is in accordance with section 133AF(2)(a) of the Building Act 2004, which requires Council to use the special consultative procedure in section 83 of the Local Government Act 2002 to identify these priority buildings.

4. How to have your say

Southland District Council encourages any person, group or business that has an interest and would like to make a submission on proposed thoroughfares for prioritisation to provide feedback.

Submissions are invited and must be received by Council no later than 5.00pm on Friday 30 October 2020

Submissions should clearly show the submitter's name, address, contact phone number and whether the submitter wishes to be heard by Council in support of their submission.

Those persons who have indicated they wish to speak to their submission will be contacted with dates and times within one month after the submission closing date.

A submission form is attached to this document, or you can obtain one from all Council offices and libraries, as well as the Council's website www.southlanddc.govt.nz/.....

² From the date the earthquake-prone building notice is issued.

³ An unreinforced masonry (URM) building has masonry walls that do not contain steel, timber or fibre reinforcement. URM buildings are older buildings that often have parapets, as well as verandas, balconies, decorative ornaments, chimneys and signs attached to their facades (front walls that face onto a street or open space).



Your completed submission can be:

- Delivered to: Submission EPB
Southland District Council,
15 Forth Street,
INVERCARGILL

Submission EPB
Otautau Area Office,
176 Main Street
OTAUTAU (dependant on area)
- Posted to: Submission EPB
Southland District Council
PO Box 903,
INVERCARGILL 9840
- Emailed to: building-cs@southlanddc.govt.nz.
- On line: www.southlanddc.govt.nz/prioritybuilding.

This statement of proposal can also be viewed at <https://www.southlanddc.govt.nz/my-council-/haveyour-say/> or in hard copy at any of Southland District Council's offices.

All submissions must state the submitter's name and their contact details. If you require any support with your submission please contact Council on 0800 732 732.

5. Criteria used to support proposal

5.1 Vehicular and pedestrian thoroughfares with sufficient traffic to warrant prioritisation.

Southland District Council has applied the following criteria to identify roads, footpaths or other thoroughfares that may be priorities:

High pedestrian areas (people not in vehicles)

Description of use	Description of area	Example of application to small town or rural area
Areas relating to social or utility activities	Areas where shops, or other services are located	Areas such as the shopping area on the main street, the local pub, community centres
Areas relating to work	Areas where concentrations of people work or move around	Areas around businesses in small towns and rural areas where there is a concentration of workers in numbers larger than small shops or cafes
Areas relating to transport	Areas where concentrations of people access transport	Areas around bus stops, train stations, tourist centres.

EPB Consultation on vehicular and pedestrian thoroughfares with sufficient traffic to warrant prioritisation [\(enter Publish Date\)](#)

3

Key walking routes	Key walking routes that link areas where people are concentrated	Routes from bus stops or other areas relating to transport to areas where shops, other services or areas people work are located
--------------------	--	--

and/or

Areas with high vehicular traffic (people in motor vehicles/on bikes)

Description of use	Description of area	Example of application to small town or rural area
Key traffic routes	Key traffic routes regularly used by vehicles including public transport	Well trafficked main streets or sections of state highways, arterial routes
Areas with concentrations of vehicles	Areas where high concentrations of vehicles build up	Busy intersections

and

Potential for part of an unreinforced masonry building to fall onto the identified thoroughfare⁴. Roads, footpaths or other thoroughfares identified with the prerequisites for priority buildings described in the act i.e. busy thoroughfares combined with URM building.

6. Proposal

Southland District Council seek your views on whether the roads, footpaths and other thoroughfares identified below have sufficient traffic to warrant prioritisation. It also seeks your views on whether there are any other thoroughfares that should be included.

Southland District Council proposes the following thoroughfares be prioritised; **Otautau Main Thoroughfares: 126-176 Main Street from the Alderly Street intersection to the Chester Street intersection.**



⁴ An unreinforced masonry (URM) building has masonry walls that do not contain steel, timber or fibre reinforcement. URM buildings are older buildings that often have parapets, as well as verandas, balconies, decorative ornaments, chimneys and signs attached to their facades (front walls that face onto a street or open space). ⁵

The EPB methodology is a regulatory tool that sets out the types of buildings that Council must identify as potentially earthquake prone.

EPB Consultation on vehicular and pedestrian thoroughfares with sufficient traffic to warrant prioritisation [Enter Public Data](#)

Questions

1. Do you agree with the thoroughfares identified for prioritisation?
2. If not, which thoroughfares do you disagree with and why?
3. Are there any other thoroughfares that meet the criteria but are not listed?

7. What happens next?

Once priority thoroughfares have been finalised, Southland District Council will look at buildings on those thoroughfares to determine whether they are potentially earthquake prone in accordance with the EPB methodology⁵.

Affected building owners will be notified. Owners of potentially earthquake-prone buildings, whether priority or not, have 12 months to provide an engineering assessment. Southland District Council will then determine whether the building is earthquake prone and notify the building owner of remediation requirements.

8. Further information

Further information on the new system for managing earthquake-prone buildings can be found at <https://www.building.govt.nz/managing-buildings/managing-earthquake-prone-buildings/>

Should you require any further information about the process or have any questions Council on 0800 732 732.

9. Tips for making an effective submission

- make it clear what you are supporting or opposing and give reasons why
- bullet points help you form ideas clearly and are easy for us to read
- dark-coloured pens make it easier to read and copy your submission
- use additional pages if required.

If you have a different option for any of the issues that you think Council should consider, please tell us.

Please note: Submissions received on the Earthquake Prone Building Legislation will be made available to the public as required by the Local Government Act 2002 and subject to the Local Government Official Information and Meetings Act 1987. This will include the name and address of submitters.

⁵ The EPB methodology is a regulatory tool that sets out the types of buildings that [Council] must identify as potentially earthquake prone.

Submission

Consultation on vehicular and pedestrian thoroughfares with sufficient traffic to warrant prioritisation

Written submissions close on Friday 30 October 2020. Those persons who have indicated they wish to speak to their submission will be contacted with dates and times within one month after the submission closing date.

If you are making a submission on more than one town please complete 1 submission per town.

Submission can be made online at: www.southlanddc.govt.nz/prioritybuilding.

Area of Consultation:	<input type="text" value="OTAUTAU"/>		
First Name:	<input type="text"/>	Surname:	<input type="text"/>
Organisation: (If appropriate)	<input type="text"/>	Postal Address:	<input type="text"/>
Phone Number:	<input type="text"/>		<input type="text"/>
Email:	<input type="text"/>	Postcode:	<input type="text"/>
If you wish to speak to your submission at Council please tick the box. <input type="checkbox"/>			

Do you agree with the thoroughfares identified for prioritisation?

YES ☐ NO ☐

If no, which thoroughfares do you disagree with and why?

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>



Are there any other thoroughfares that meet the criteria but are not listed? YES

NO

☐☐

If yes, please describe thoroughfare location and why you believe it should be identified.

Any other information on thoroughfares and / or earthquake-prone buildings you wish Council to consider.

Tips for making an effective submission

- make it clear what you are supporting or opposing and give reasons why
- bullet points help you form ideas clearly and are easy for us to read
- dark-coloured pens make it easier to read and copy your submission
- use additional pages if required.

If you have a different option for any of the issues that you think Council should consider, please tell us.

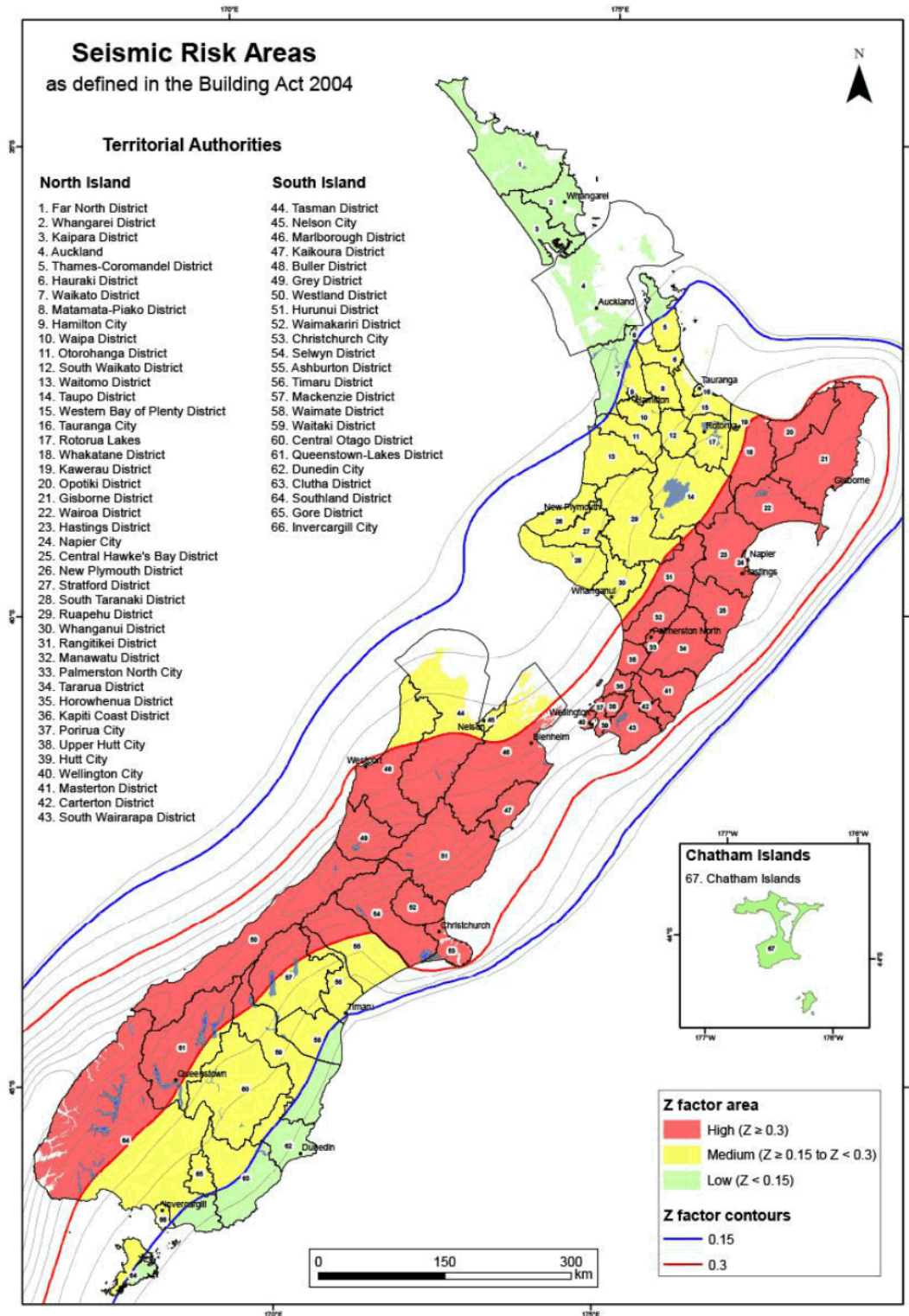
Please note: Submissions received on the Earthquake Prone Building Legislation will be made available to the public as required by the Local Government Act 2002 and subject to the Local Government Official Information and Meetings Act 1987. This will include the name and address of submitters.

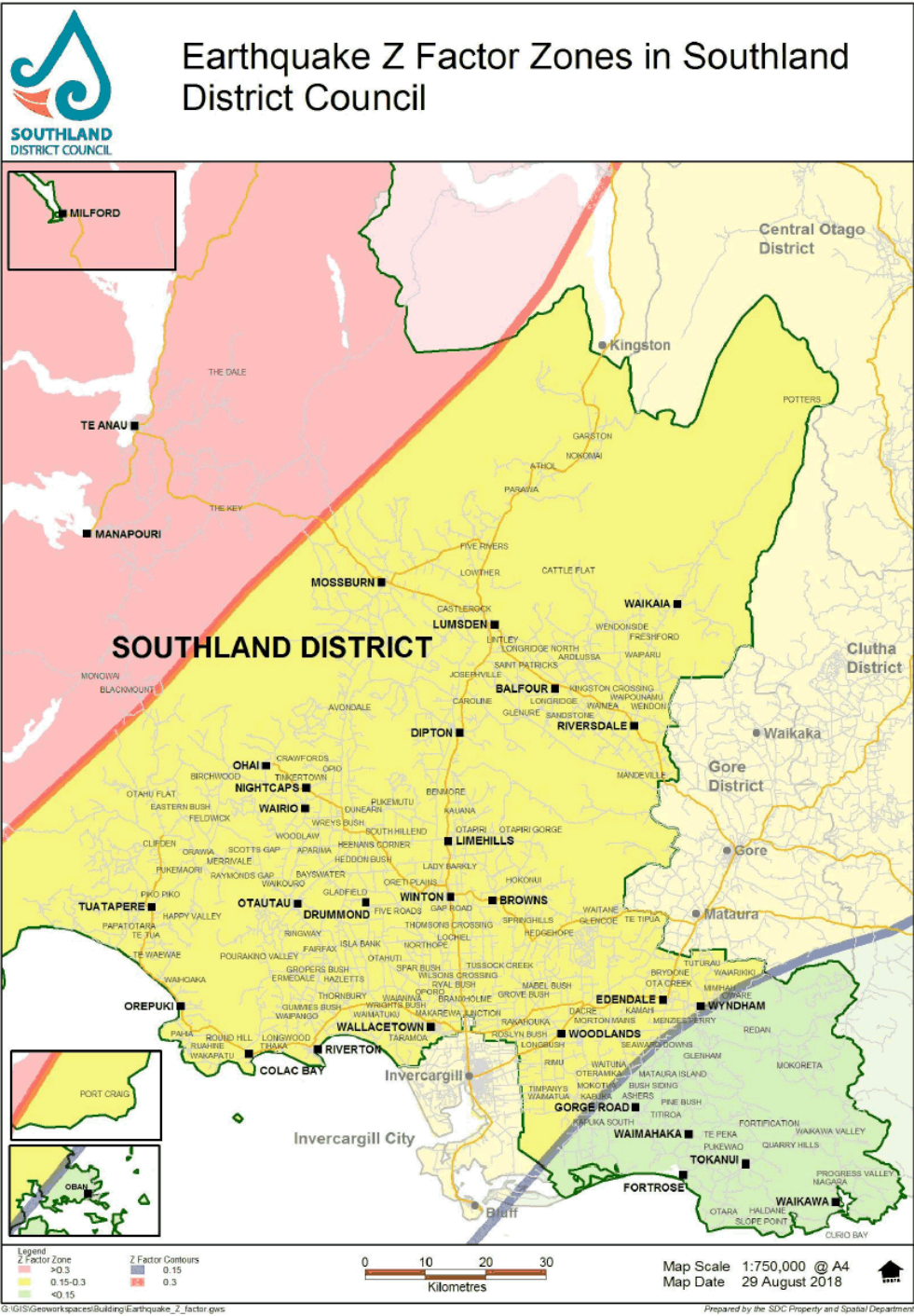
Please return your submission as set out on page 3 of the Statement of Proposal EPB.

Thank you for your time to support your community and council

EPB Consultation on vehicular and pedestrian thoroughfares with sufficient traffic to warrant prioritisation (enter Publish Date)

7





Communications and engagement plan for EPB consultation 2020

Background

A new national system for identifying and managing earthquake-prone buildings came into effect on 1 July 2017. The new system prioritises identifying and remediating earthquake-prone buildings that either pose a high risk to life and safety or are critical to recovery in an emergency.

Certain hospital, emergency and education buildings that are earthquake prone will be classified as 'priority buildings'. Other earthquake-prone buildings may be 'priority buildings' because of their location and the potential impact on people of their failure in an earthquake.

Southland District Council needs the public's help to identify roads, footpaths and other thoroughfares that may warrant prioritisation.

To start the process Southland District Council has identified possible thoroughfares in Otautau, Winton, Riverton, Tuatapere and Wyndham that have unreinforced masonry (URM) buildings and may have sufficient vehicle or pedestrian traffic to warrant prioritisation.

An unreinforced masonry (URM) building has masonry walls that do not contain steel, timber or fibre reinforcement. URM buildings are older buildings that often have parapets, as well as verandas, balconies, decorative ornaments, chimneys and signs attached to their facades (front walls that face onto a street or open space). These would be potentially life-threatening hazards if they fell into a widely used thoroughfare during an earthquake.

Aim of this engagement

The aim of this strategy and implementation plan is to ensure all our stakeholders understand the situation, and can take part in the conversations about what the next steps are and how we mitigate the problems we face.

It is about ensuring we are all in one waka doing our best together for Southland.

Phases and Audiences

Priority building owners and residents of Otautau, Winton, Riverton, Tuatapere and Wyndham are the primary stakeholders in this consultation. Their local knowledge of the level of vehicle and pedestrian use of thoroughfares in their own townships is pivotal to Council getting the best information with which to identify priority buildings.

The wider public of Southland District and the wider Southland region are the secondary stakeholders, offering a less personalised but equally valuable perspective on buildings that might be considered to be 'priority' buildings.

PHASES	AUDIENCES	MESSAGES
Phase 1 – 25 July 2020: Mailout to known possible earthquake prone building owners in affected townships	Potential priority building owners in affected townships	We have a responsibility to identify thoroughfares that contain possible priority earthquake-prone buildings and we need your help to do this for the benefit and safety of everyone.
Phase 2 – 3 August 2020: Mailout to residents in affected townships.	Residents in affected townships	We have a responsibility to identify thoroughfares that contain possible priority earthquake-prone buildings and we need your help to do this for the benefit and safety of everyone.
Phase 2 – 10 August-30 October 2020: Formal consultation period. Consultation open with supporting information and publicity campaign outlining the issue we are facing, the purpose of the consultation and what we want to achieve as a result of it.	All stakeholders	We have a responsibility to identify thoroughfares that contain possible priority earthquake-prone buildings and we need to work together for the benefit and safety of the public.
Phase 3 – Hearings and deliberations. November-December 2020	Southland District Council, stakeholders who would like to speak their submissions to Council	
Phase 4 – 1 July 2022. Council must identify possible earthquake-prone buildings in medium-risk areas	All stakeholders, public	

Key messages

- A new system prioritises identification and remediation of earthquake-prone buildings that pose a high risk to life and safety. These earthquake-prone buildings will be classified as possible priority buildings.
- We need community input to help to identify the roads, footpaths and other thoroughfares that should be included to help identify possible priority earthquake-prone buildings.
- Let's work together to do this – we all have a part to play in making Southland better.

Tactics to be used

TYPE OF COMMUNICATION/ENGAGEMENT CHANNEL	COMMENT
First contact with primary stakeholders	Personalised letter mailout to potential priority building owners and residents in affected townships
Social media-Facebook, Instagram	Repeated messages outlining the background to the issue, what we are doing about it and why we need the community's help to identify priority earthquake-prone buildings. These posts to link to online resource material and consultation documents on Council's engagement platform www.makeitstick.nz
Multi-media advertising	Print media – advertising and press release. Leading the Way page in Express, Ensign. Southland App. Radio advertising.
Consultation document and submissions	Legal requirement to seek stakeholder feedback on key issues and plans

Communication issues/risks

ISSUE/RISK	POSSIBLE MITIGATION
A degree of protectionism is evident in communities involved – why is Council picking on our town?	Re-emphasise requirement of Council to carry out this consultation for public good. Re-emphasise timeframes for building owners to remediate priority buildings. Views of non-residents also sought to provide balancing perspectives.

Disposal of Land Adjoining 29 Springford Street, Winton

Record No: R/20/6/23672
Author: Theresa Cavanagh, Property Advisor
Approved by: Matt Russell, Group Manager Services and Assets

☒ Decision

☐ Recommendation

☐ Information

Purpose

- 1 To declare that part of 245 Great North Road, Winton is surplus to requirements. This would enable an accessway (including a bridge) to be subdivided off and sold to the owners of the neighbouring property, being 29 Springford Street.

Executive Summary

- 2 The owners of 29 Springford Street, Winton, access their property via a bridge which is located on land owned by Council. This bridge is in a state of disrepair and Council had intended to stop the use of the bridge in the near future for health and safety reasons.
- 3 29 Springford Street recently sold and the new owner has agreed to pay for subdivision and legal costs to subdivide the area where the bridge is located. This is on the basis that the ownership of the land containing the bridge would be transferred and amalgamated with the title for 29 Springford Street for a nominal fee.
- 4 This eliminates any future liability to Council for either upgrading the bridge or the risks associated with having an unsafe bridge located on their property.
- 5 The Winton Community Board, at its meeting on 15 June 2020, resolved to *recommend to Council that part of Lot 5 DP 515488 (being the area where the bridge is located which provides physical access to 29 Springford Street) be subdivided and amalgamated with Record of Title SL12A/582 and agrees that the land be transferred for \$1 subject to the owner of 29 Springford Street paying all survey and legal costs.*

Recommendation

That the Council:

- a) **Receives the report titled “Disposal of Land Adjoining 29 Springford Street, Winton” dated 16 July 2020.**
- b) **Determines that this matter or decision be recognised as not significant in terms of Section 76 of the Local Government Act 2002.**
- c) **Determines that it has complied with the decision-making provisions of the Local Government Act 2002 to the extent necessary in relation to this decision; and in accordance with Section 79 of the act determines that it does not require further information, further assessment of options or further analysis of costs and benefits or advantages and disadvantages prior to making a decision on this matter.**
- d) **Resolves that part of Lot 5 DP 515488 (being the area where the bridge is located which provides physical access to 29 Springford Street) is surplus to requirements.**
- e) **Agrees that said land be transferred for \$1 to the owner of 29 Springford Street subject to the land being amalgamated with Record of Title SL12A/582 and to the owner of 29 Springford Street paying all related survey and legal costs.**
- f) **Delegates to the Chief Executive the authority to executive any necessary documents related to this transfer.**

Background

- 6 The owners of 29 Springford Street, Winton, access their property via a bridge which is located on land owned by the Council, as per the attached map. This bridge is in a state of disrepair and Council had intended to stop the use of the bridge in the near future for health and safety reasons.
- 7 29 Springford Street recently sold and the new owner was aware of the intended closure of the bridge and approached Council for a solution. Council proposed that the part of 245 Great North Road where the bridge is located is subdivided off and the ownership transferred to the owners of 29 Springford Street. This eliminates any future liability to Council for either upgrading the bridge or the risks associated with having an unsafe bridge located on their property.
- 8 29 Springford Street has legal access off Florence Road and the new owner would either establish access at this location and retain the bridge for pedestrian access only, or upgrade the bridge for vehicular access. Any future use or works on the bridge would be the responsibility of the new owner.

Issues

- 9 The bridge provides access to 29 Springford Street only so there are no other users to consider.
- 10 Stormwater infrastructure runs through the area of land proposed to be subdivided off, all of which are protected by an easement in gross to SDC. It consists of an open drain which runs underneath the bridge as well as 9m of mains pipe which runs into the open drain. Council's Water & Waste Department have confirmed that they have no concerns about the proposed

transfer of ownership as the rights for Council to locate and maintain the stormwater asset is protected via the easement.

Factors to Consider

Legal and Statutory Requirements

- 11 This land is freehold and therefore a normal subdivision and transfer would be undertaken.

Community Views

- 12 The resolution from the Community Board is considered to represent the community's view.

Costs and Funding

- 13 The new owner of 29 Springford Street has agreed to pay all subdivision and legal costs on the basis that Council transfer ownership of the subdivided land to them for a nominal fee.

Policy Implications

- 14 None identified at this stage.

Analysis

Options Considered

- 15 Declare the land surplus to enable the transfer of the bridge to the adjacent landowner, or not.

Analysis of Options

Option 1 – Declare the land surplus to enable transfer of the bridge to the adjacent landowner

<i>Advantages</i>	<i>Disadvantages</i>
<ul style="list-style-type: none">• Eliminates liability on Council for the bridge.• Enables the new owner of 29 Springford Street to secure ownership of a bridge associated with their property.	<ul style="list-style-type: none">• None identified.

Option 2 – Status Quo

<i>Advantages</i>	<i>Disadvantages</i>
<ul style="list-style-type: none">• None identified.	<ul style="list-style-type: none">• Council continues to be exposed to liability for the presence of the bridge.• Prevents the new owner of 29 Springford Street from owning a bridge associated with their property.

Assessment of Significance

- 16 Not considered Significant.

Recommended Option

- 17 Option 1 - Declare the land surplus to enable transfer of the bridge to the adjacent landowner.

Next Steps

- 18 Confirm with the owner of 29 Springford Street, that they may proceed with the subdivision and amalgamation process.

Attachments

- A Springford Street Maps [↓](#)

29 Springford Street (orange boundary)

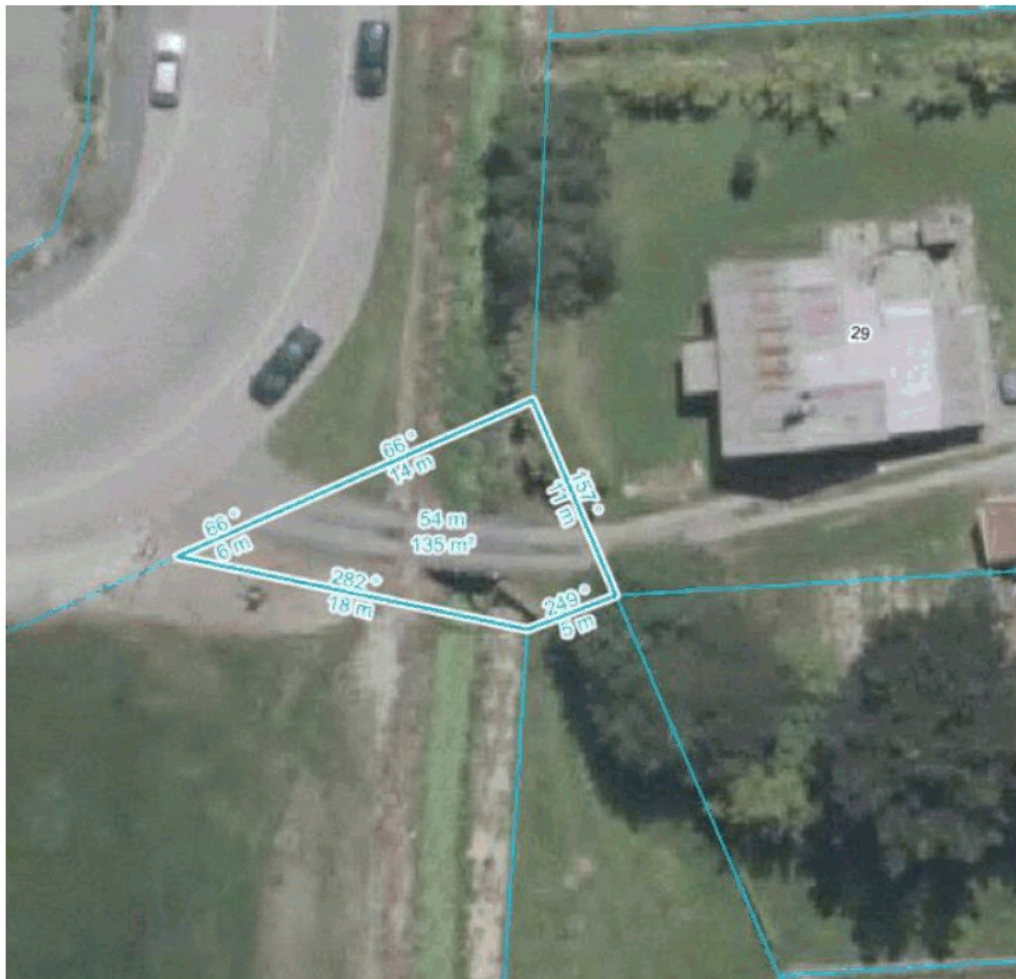
and

Council Property to the West

Please ignore blue line



An indication of the proposed lot to be created



Health and Safety Update

Record No: R/20/6/23260
Author: Janet Ellis, People and Capability Manager
Approved by: Steve Ruru, Chief Executive

☐ Decision ☐ Recommendation ☒ Information

Purpose

- 1 To provide an update on health and safety related incidents and activity over the last six months.

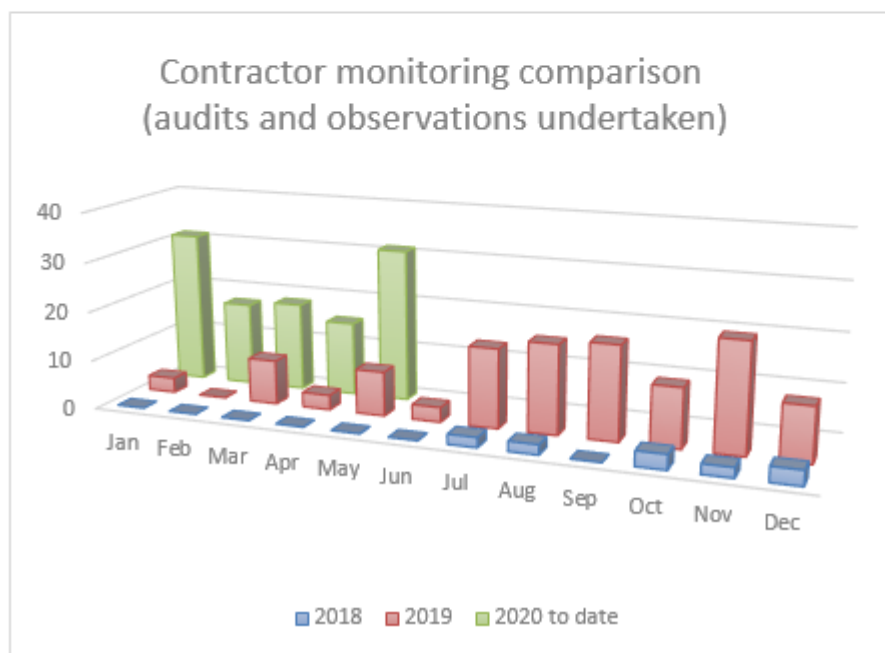
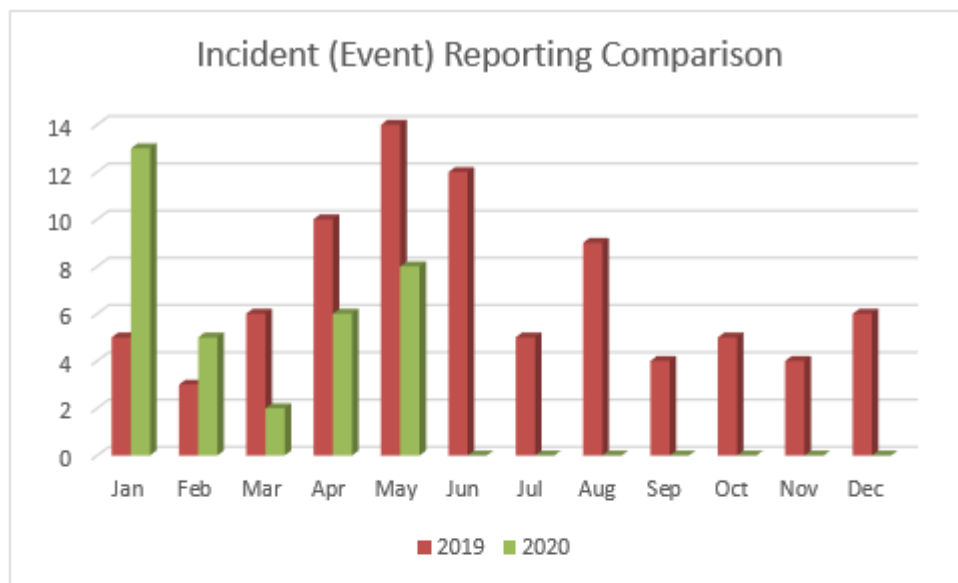
Content

Incidents/Near Misses – Southland District Council

- 2 As part of the Health and Safety Plan for 2019/2020 and the draft Health and Safety Plan for 2020/2021 we are ensuring that we have consistency of reporting on both lead and lag indicators.
- 3 Lagging indicators are typically “output” oriented, easy to measure but hard to improve or influence while leading indicators are typically input oriented, hard to measure and easy to influence.
- 4 Lead indicators include Near Misses, Audits and Inspections and progress against the Health and Safety Plan. Lag indicators include Medical Treatment Interventions (MTI), Incidents, Lost time due to injury, Worksafe notifications and Number of Incident Investigations completed.
- 5 A summary of these indicators for the year from 1 January 2020 to 30 June 2020 is below. In January there were two MTIs. These were a twisted knee that occurred on 24 December 2019 that was not reported until January 2020 and a cat bite that caused infection. In February there was one MTI, this involved an employee getting lacerations to her fingers that required stitches.
- 6 In addition please find below a summary of contractor monitoring comparison and the incident (event) reporting comparisons. Please note that the incident event peaking in April, May and June 2019 relates to the increases in near miss events that relate back to traffic incidents on Clyde Street during the Kmart construction project. It is pleasing to note an eighty two percent increase in contractor monitoring and recording since 2017.

Summary of Indicators – 1 January 2020 to 30 June 2020

Date	Total Reported Events	EDI - Early Discomfort Event	NMI - Near Miss Event	MNI - Minor No Treatment Event	FAI - First Aid Event	MTI - Medical Treatment Injury Event	LTI - Lost Time Event	PDI - Property Damage Event	RSK - Risk Reports	Other (ie Medical Event/NWR)	Number of events investigated	Number of Corrective Actions set	Number of Corrective Actions achieved	LTI Free Days	Days Lost Time	ACC Claims	Safety/Site Observations received	Contractors Audited	Contractors requiring follow up
Jan-20	13	2	2	0	2	2	0	0	5	0	13	13	11	84	0	1	15	16	0
Feb-20	5	0	1	0	0	1	0	1	2	0	5	5	3	113	0	0	9	8	0
Mar-20	2	1	0	0	0	0	0	0	1	0	2	3	3	144	0	1	12	6	0
Apr-20	6	3	0	0	0	0	0	0	3	0	6	1	0	174	0	0	10	5	0
May-20	8	2	1	2	0	0	0	1	2	0	8	3	4	205	0	0	27	4	0
Jun-20	3	0	1	0	0	0	0	0	2	0	2	2	1	235	0	0	6	5	0
Jul-20																			
Aug-20																			
Sep-20																			
Oct-20																			
Nov-20																			
Dec-20																			
Total	37	8	5	2	2	3	0	2	15	0	36	27	22		0	2	79	44	0



Other Health and Safety Related initiatives

- 7 There are many ways to keep current on health and safety matters, subscribing to the Worksafe updates is an easy way to remain up to date. The link is:
<https://worksafe.govt.nz/home/subscriptions>
- 8 Health and safety training continues with staff completing the health and safety e-learning modules based on the health and safety procedures. All new staff are required to complete all the modules.
- 9 Safety observations and inspections have continued to increase with the new health and safety software providing a tailored app which is being piloted by the project delivery team. As detailed above there has been a significant increase in contractor monitoring and reporting since 2017.

- 10 With the increase of monitoring there has been an increased number of corrective actions required.
- 11 Health and safety governance training is being scheduled for late 2020. All community boards have had a health and safety presentation/induction.
- 12 GPS (ERoad) installation has begun in vehicles and will happen in stages with groups of 10 at a time.
- 13 Panic alarm upgrades have begun with Invercargill and Winton completed to date.
- 14 The new health and safety system has been implemented and released to all areas of the business.
- 15 Council has continued to manage its response to the Covid-19 pandemic. From an organisational operations perspective all staff have continued to work from home where practical for the period of the alert level 4 and 3 lockdown. With the move to alert level 2 and then alert level 1 the majority of staff are now working back in the office and field.
- 16 The executive leadership team continues to keep a very close watch on the impact to Southland District Council. The latest key information from the Ministry of Health (MOH) is distilled continually.
- 17 The new system was utilised during Covid-19 alert levels 4, 3 and 2 to support contractor and project management in regards to the risk of transmission and infection of Covid-19. All contractor Covid-19 risk management plans were processed through the permit to work module of the H&S system (the SHED) so as to easily identify and monitor the works being undertaken with this added risk factor during this time. 120 permits to work have been approved for project or contract continuation and restarts during alert levels 4, 3 and 2.
- 18 Our H&S system also continued to support employee self-check safety observations and pre-site visit checks during this time. The flexibility of the H&S application on smart phones and the online platform enabled transitions through the alert levels and SDC's health safety wellbeing response to be supported by the system. A system that has now been put through its paces and is delivering as expected, with all employees able to use this tool via app, platform or portal as required.
- 19 In late June 2020, Southland District Council used an external consultant to undertake a high level assessment and review of Council's approach to the management of health and safety. This included a review of Council's governance framework, strategic plan and performance measures and targets. The review also included a thin slice review of the health and safety management system targeting risk management, incident management, worker engagement, contractor management and injury management. Any opportunities identified as part of this gap analysis will be incorporated into the 2020/21 implementation plan.

Recommendation

That the Council:

- a) **Receives the report titled "Health and Safety Update" dated 16 July 2020.**

Attachments

There are no attachments for this report.

Draft Health and Safety Plan for 2020/21

Record No: R/20/6/22888
Author: Janet Ellis, People and Capability Manager
Approved by: Steve Ruru, Chief Executive

☒ Decision

☐ Recommendation

☐ Information

Purpose

- 1 To seek formal approval on the draft Health and Safety Plan 2020/2021.

Executive Summary

- 2 Southland District Council has an obligation to manage the health and safety of its staff, contractors and volunteers. To be able to do this Council needs to continue on its journey with improving the focus on health and safety in the coming year.
- 3 A draft Health and Safety Plan for 2020/21 has been drafted which contains the proposed objectives for the year ahead. The plan was presented to the Finance and Assurance Committee on 22 June 2020 and they have provided their endorsement of the plan for Council's consideration and approval.

Recommendation

That the Council:

- a) **Receives the report titled "Draft Health and Safety Plan for 2020/21" dated 16 July 2020.**
- b) **Determines that this matter or decision be recognised not significant in terms of Section 76 of the Local Government Act 2002.**
- c) **Determines that it has complied with the decision-making provisions of the Local Government Act 2002 to the extent necessary in relation to this decision; and in accordance with Section 79 of the Act determines that it does not require further information, further assessment of options or further analysis of costs and benefits or advantages and disadvantages prior to making a decision on this matter.**
- d) **Approves the Health and Safety Plan for 2020/2021.**

Background

- 4 In 2019/20 ongoing progress was made on health, safety and wellness within Council including the implementation of a health and safety system, improved contractor approval process, ongoing development of health and safety training, continued work on critical risk control plans, implementation of the drug and alcohol policy and the start of the implementation of GPS in fleet vehicles.
- 5 An update on the Health and Safety Plan as of 31 May 2020 is attached (Attachment A) for Council's information. The critical control plan work is proposed to continue into 2020/21 along with the training on the procedures.

- 6 In 2017 our progress was benchmarked and reviewed by Simpson Grierson. In late June 2020 a new gap analysis will be undertaken. It is envisaged that in the 2020/21 year the focus will be to implement any opportunities identified in the gap analysis as well as what is identified in the draft plan.
- 7 A Health and Safety Plan for 2020/2021 has been drafted and is attached (Attachment B) for Council approval.
- 8 The plan contains a review of previous performance and objectives and spells out proposed improvement measures and targets. It identifies key elements to deliver improvement and allocates sponsors to ensure momentum is maintained.

Factors to Consider

Legal and Statutory Requirements

- 9 Council has a legislative obligation to manage the health and safety of workers.
- 10 The Health and Safety Plan continues the focus on a risk based approach to managing health and safety based within its undertakings.

Costs and Funding

- 11 There will be ongoing health and safety costs with the implementation of this plan. Current known costs have been budgeted in the Long Term Plan. Both the Finance and Audit Committee and Council in March 2018 endorsed the continued spending on health and safety to ensure our staff get home safe every day.

Policy Implications

- 12 The current Health and Safety Policy will need to be amended following finalisation of the Plan.

Analysis

Options Considered

- 13 The options considered are to approve the Health and Safety Plan as presented (Option 1), recommend the plan subject to some minor amendments (Option 2) or Do Nothing (Option 3).

Analysis of Options

Option 1 – Agree to the Draft Health and Safety Plan 2020/2021

<i>Advantages</i>	<i>Disadvantages</i>
<ul style="list-style-type: none"> improvement of health and safety culture illustration that Council and ELT are committed to caring for the wellbeing and safety of our people decline in the number of injuries meet legislative requirements. 	<ul style="list-style-type: none"> possible additional financial implications.

Option 2 – Modifies the Draft Health and Safety Plan 2020/2021

<i>Advantages</i>	<i>Disadvantages</i>
<ul style="list-style-type: none">• save some initial costs in the short term.	<ul style="list-style-type: none">• no clear guidelines• health, safety and wellbeing of our people in jeopardy• may not be consistent with legislative obligations.

Option 3 – Do Nothing

<i>Advantages</i>	<i>Disadvantages</i>
<ul style="list-style-type: none">• avoids short term cost implications.	<ul style="list-style-type: none">• inconsistency in procedures• no clear guidelines• health, safety and wellbeing of our people in jeopardy• not consistent with legislative obligations.

Assessment of Significance

- 14 The matter being considered is an administrative matter and hence is not considered to be significant in terms of section 76 of the Local Government Act 2002.

Recommended Option

- 15 Agrees to approve the Health and Safety Plan for 2020/21.

Next Steps

- 16 Continue working on the execution of the plan and update the health, safety and wellbeing policy.

Attachments

- A Update on Health Safety and Wellbeing Action Plan [↗](#)
B Draft Health and Safety Plan 2020/21 [↗](#)

Update on Health Safety Wellbeing Action Plan

31st May 2020

In July 2019, Council agreed to the Health and Safety Plan 2019/20. Below is an update as of 31st May 2020.

KEY FOCUS AREAS FOR H&S	STEPS TO COMPLETE	SPONSOR	COMPLETE BY	UPDATE
Complete implementation of H&S Training The development of health, safety and wellbeing e-learning modules and ensuring people are trained in what they are doing was a key focus for 2018/19. Reviewing and updating e-learning modules and supporting new employees in their health, safety and wellbeing training is the focus for 2019/20	Continue to develop education on our key H&S processes and ensure our people are trained in what we are doing.	Bruce Halligan	Dec 2019	Ongoing
	All staff trained in the e-learning modules		Dec 2019	Complete, new employees supported as they join organisation
Critical Risk Educate and train our people on risk and hazard management. Prioritise Critical Risks and allocate resources based on the priorities. Complete the development of control plans, and assessment of effectiveness of the controls for the risks. On-going monitoring and management of critical risks seen as part of the audit and assurance process.	Finalisation of the serious mental harm critical risk control plan (bowties) and approval from ELT sponsor.	Trudie Hurst	June 2019	Ongoing work – will continue in 2020/2021
	Assess the effectiveness of the controls for the control plan and create corrective actions for any deemed not effective.		June 2019	
	Monitor closing out of corrective actions in Monthly reporting.		Dec 2020	
Implementation of a H&S system Implement a web based Health and Safety system in line with budget and industry practice	Implementation plan complete	Anne Robson	June 2019	Complete
	Implementation of new H&S System		By Sept 2019	Complete
Wellbeing	Continue the work with becoming a Healthy Thinking Organisation	Janet Ellis	ongoing	Ongoing The last healthy thinking

KEY FOCUS AREAS FOR H&S	STEPS TO COMPLETE	SPONSOR	COMPLETE BY	UPDATE
Continue to create a proactive and structured approach to dealing with staff wellbeing.				workshops and KYND app promotion Feb 2020
Contractor management Requalify and review approved contractors	Requalify and review approved contractors ready for H&S system implementation	Matt Russell	June 2019	Complete
	Determine routine audit and safety inspection schedules for all contractors and council engaging supervisors		June 2019	Ongoing
Gap Analysis Undertake a gap analysis to assess our improvements and detail any areas for improvement.	Undertake an H&S gap analysis	Steve Ruru	Feb 2020	Booked in for June 2020
	Implement improvement opportunities in the gap analysis		From Mar 2020	Moved to 20/21 plan

Health Safety & Wellbeing Plan 2020/2021

	June 2020
Date Approved:	
Approved By:	

Our H&S Commitment – Approved by Council

We care for the wellbeing and safety of our people and those who interact with us. Our goal is to deliver safe and effective services to our community and ensure everyone gets safe home every day.

Current State

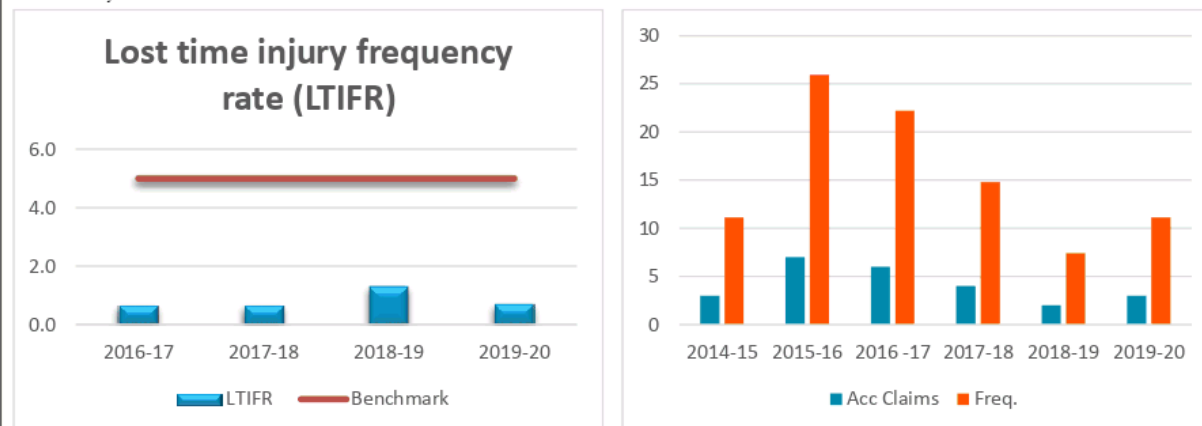
With the new health and safety system implemented and now being utilised across the organisation, tracking of health and safety monitoring, events and corrective actions is more transparent. This supports health safety and wellbeing accountability for all staff, contractors and visitors to achieve our goal of safe home every day.

Our health and safety was benchmarked and reviewed by an external organisation in 2017, and our health and safety management has focused on key gaps identified in this analysis. Leading into the 2020/21 plan, a health and safety external gap analysis undertaken in June 2020 will ensure we continue on the correct path to continually improve health safety and wellbeing.



As an Executive Leadership Team we have discussed our current culture in H&S against the Hearts and Minds culture ladder developed by Hudson. The adjacent diagram indicates where we believe our current organisational culture to be. It is positive to see the move up this ladder from a reactive and calculative culture progressing towards a proactive culture. We need to have a plan that will continue to deliver a focus on health, safety and wellbeing to achieve the goal of proactive towards generative. We have developed this plan, as a way to ensure we measure and progress our health, safety and wellbeing journey. We acknowledged that health, safety and wellbeing continues to be one of our top priorities as an Executive Leadership team.

The graph below shows our **current** lost time injury frequency rates (LTIFR) since 2016. This is based on the average hours worked by our 153 FTE workforce. This frequency rate is the number of lost time injuries per 200,000 hours worked. While the majority of the injuries recorded are minor in nature, it is a reminder that a serious injury can occur at any time. Contemporary organisations use a <5 total injury frequency rate (LTIFR) as a benchmark target. A graph of ACC claim trends below also indicates that with the continued focus on H&S, injuries requiring an ACC claim remaining low, being 3 for the 2019/20 year.



Action Plan

As part of our commitment as a Leadership Team we will co-sponsor a key activity within the health, safety and wellbeing plan, this sponsorship commitment is to supporting the roll-out of the initiative or objective and keep each other and our teams on track in undertaking the objectives within SDC.

Key Focus Areas for H&S	Steps to complete	Sponsor	Complete by date
Review of H&S Training and addition of final framework modules Reviewing and updating e-learning modules and supporting new employees in their health, safety and wellbeing training was the focus for 2019/20. The review and refining of these modules remains the focus for 2020/21 with the addition of the last four framework topics. Refresher will be a key part of H&S training for 2020/21 along with supporting new employees undertaking this.	Continue to develop education on our key H&S processes and ensure our people are trained in what we are doing.	Janet Ellis	Dec 2020
	Review current modules and refine. Update to add the new H&S management system procedures		Mar 2021
	All staff refreshed in the e-learning modules		June 2021
Critical Risk Continue to educate and train our people on risk management. Prioritise Critical Risks and allocate resources based on the priorities. Complete assessment of effectiveness of the controls for the risks. On-going monitoring and management of critical risks seen as part of the audit and assurance process.	Finalisation of the serious mental harm critical risk control plan (bowties) and approval from ELT sponsor. Assess effectiveness of controls and develop corrective actions	Trudie Hurst	Dec 2020
	Review critical risk bowties in line with gap analysis recommendations		August 2020
	Focus on lone working risk management		Dec 2020
Wellbeing Continue to create a proactive and structured approach to dealing with staff wellbeing and extending this to our community	Continue the work with becoming a Healthy Thinking Organisation	Janet Ellis	ongoing
	Extend our healthy thinking opportunities to our community		
Contractor management Contractor monitoring and communication	Steadily increase contractor monitoring and recording via H&S system (SHED app and platform)	Matt Russell	Dec 2020
	Improve communication and engagement with contractors by encouraging constructive feedback and creating more opportunities to work together to ensure everyone gets safe home every day		May 2021
Gap Analysis Assess our improvements and detail any areas for improvement.	Review current actions against gap analysis recommendations and align health safety wellbeing implementation plan	Steve Ruru	July 2020
	Implement improvement opportunities in the gap analysis		From Aug 2020

Appointments to the Milford Community Trust

Record No: R/20/7/26170
Author: Simon Moran, Community Partnership Leader
Approved by: Rex Capil, Group Manager Community and Futures

☒ Decision ☐ Recommendation ☐ Information

Purpose

- 1 To seek approval from Council to appoint Stephen Norris and Tony Woodham as trustees of the Milford Community Trust.

Executive Summary

- 2 The report provides some background to the trust, a summary of the appointments process and recommends appointing Stephen Norris and Tony Woodham as trustees.

Recommendation

That Council:

- a) **Receives the report titled “Appointments to the Milford Community Trust” dated 16 July 2020.**
- b) **Determines that this matter or decision be recognised as not significant in terms of Section 76 of the Local Government Act 2002.**
- c) **Determines that it has complied with the decision-making provisions of the Local Government Act 2002 to the extent necessary in relation to this decision; and in accordance with Section 79 of the Act determines that it does not require further information, further assessment of options or further analysis of costs and benefits or advantages and disadvantages prior to making a decision on this matter.**
- d) **Appoints Stephen Norris and Tony Woodham as Trustees of the Milford Community Trust.**

Background

- 3 The Milford Community Trust was established in 2007 by Southland District Council and the Department of Conservation with the assistance of Environment Southland for the purposes of providing leadership and governance for the Milford community.
- 4 The objectives of the trust are:
 - (a) To manage and carry out services and undertake leadership, planning and advocacy for the general benefit of the Milford community so as to ensure as far as possible that the infrastructure of the community and its sense of identity, viability and wellbeing are maintained and enhanced.

- (b) To liaise with and communicate with all individuals, organisations, groups and other parties with interests in the Milford community for all purposes which are beneficial to the community.
- (c) To represent the interests of the Milford community to ensure that the natural environments and outstanding values of the Milford Sound area are safeguarded and protected for all residents and visitors to the area.
- (d) To monitor and maintain an overview of all activities and services provided within the Milford community.
- (e) To consider and report on all matters either referred to and/or delegated to it from time to time by the Department of Conservation and Southland District Council and on any matter of interest or concern to the Milford community.
- (f) To access, use or invest funds and enter into arrangements, contracts and other agreements upon such securities or in such manner and upon such terms and conditions that the trustees deem suitable for the purpose of furthering the objects and purposes of the trust.
- (g) To carry out such other lawful activities which are incidental or conducive to attaining the objects and purposes of the trust.

Issues

- 5 Since June 2018 two trustee positions have been vacant due to the trust wanting to consider its future, particularly with regard to whether the recreation centre was going to proceed. Although the project has been deferred for 12 months due to the effects of Covid-19 on tourism it is important to now fill these trustee roles.

Factors to Consider

Legal and Statutory Requirements

- 6 The Trust Deed sets out the trustee positions, who may qualify for appointment to the trust, and the process for their appointment.
- 7 As part of that process there is a Trustee Appointments Recommendation Panel made up of the chief executives of Southland District Council and Environment Southland, the Department of Conservation's Southland Conservator (now the director of operations under the new structure) and the Milford Community Representative Trustee. In this instance there were two applications received for two vacant positions and both applicants work in tourism operations associated with Milford. Therefore the recommendations panel was not required to interview and select applicants to recommend to Council.

Community Views

- 8 As stated above the Trust Deed sets out the process and it does not require community input.

Costs and Funding

- 9 The appointment of the trustees will not alter existing costs and funding for the trust or Council.

Policy Implications

- 10 There are no policy implications.

Analysis

Options Considered

- 11 At a basic level the options are straight forward – they are that Council either makes the appointments or it does not.

Analysis of Options

Option 1 – Appoint the Trustees

<i>Advantages</i>	<i>Disadvantages</i>
<ul style="list-style-type: none">the trust has continuity	<ul style="list-style-type: none">none

Option 2 – Do not appoint the Trustees

<i>Advantages</i>	<i>Disadvantages</i>
<ul style="list-style-type: none">none	<ul style="list-style-type: none">any significant decisions made by the trust should be made by as many trustees as possible

Assessment of Significance

- 12 The decision sought from Council does not trigger any of the significance criteria.

Recommended Option

- 13 Option 1 is recommended.

Next Steps

- 14 Advise Stephen Norris and Tony Woodham that they have been appointed by Council to their respective roles.

Attachments

There are no attachments for this report.

Exclusion of the Public: Local Government Official Information and Meetings Act 1987

Recommendation

That the public be excluded from the following part(s) of the proceedings of this meeting.

C10.1 Disposal of Land - Winton Wools Limited

C10.2 Unbudgeted Expenditure - 2020/2021 Insurance Renewal

The general subject of each matter to be considered while the public is excluded, the reason for passing this resolution in relation to each matter, and the specific grounds under section 48(1) of the Local Government Official Information and Meetings Act 1987 for the passing of this resolution are as follows:

General subject of each matter to be considered	Reason for passing this resolution in relation to each matter	Ground(s) under section 48(1) for the passing of this resolution
Disposal of Land - Winton Wools Limited	<p>s7(2)(b)(ii) - The withholding of the information is necessary to protect information where the making available of the information would be likely unreasonably to prejudice the commercial position of the person who supplied or who is the subject of the information.</p> <p>s7(2)(i) - The withholding of the information is necessary to enable the local authority to carry on, without prejudice or disadvantage, negotiations (including commercial and industrial negotiations).</p>	That the public conduct of the whole or the relevant part of the proceedings of the meeting would be likely to result in the disclosure of information for which good reason for withholding exists.
Unbudgeted Expenditure - 2020/2021 Insurance Renewal	<p>s7(2)(b)(ii) - The withholding of the information is necessary to protect information where the making available of the information would be likely unreasonably to prejudice the commercial position of the person who supplied or who is the subject of the information.</p>	That the public conduct of the whole or the relevant part of the proceedings of the meeting would be likely to result in the disclosure of information for which good reason for withholding exists.