BEFORE THE INDEPENDENT PANEL
OF KAPITI COAST DISTRICT COUNCIL

IN THE MATTER	of the Resource Management Act 1991 ("**RMA**")
AND	
IN THE MATTER	of Private Plan Change 4 ("**PC4**") to the Kāpiti Coast District Plan ("**Plan**") - 65 and 73 Ratanui Road, Otaihanga

---

STATEMENT OF EVIDENCE OF AARON DAVID SMAIL ON BEHALF OF WELHOLM DEVELOPMENTS LIMITED

(CORPORATE)

16 JANUARY 2025

Russell McVeagh

D J Minhinnick / E M E Boister
P +64 9 367 8000
F +64 9 367 8163
PO Box 8
DX CX10085
Auckland

1. INTRODUCTION

1.1 My full name is Aaron David Smail. I am the Chief Development Officer NZ at Summerset Group Holdings Limited and a director of Welhom Developments Limited, a subsidiary of Summerset Group Holdings Limited that acquires and holds new sites for future development (together known as "**Summerset**"). I form part of the Executive Leadership Team at Summerset.

Qualifications and experience

1.2 I hold a Bachelor of Engineering (Civil) from Canterbury University and a Bachelor of Business (Management) from Massey University.

1.3 I have 35 years' experience in residential and commercial development including 10 years leading the development of retirement villages with aged care.

1.4 I have overall responsibility for the Development and Design teams at Summerset and manage development of Summerset's New Zealand villages from acquisition through to the construction documentation stage. This includes oversight of site selection and the acquisition process through Welholm Developments Limited, including for the 12.65ha of land at 65 and 73 Ratanui Road in Otaihanga north of the Paraparaumu town centre ("**Site**") that is the subject of this plan change request, and consenting through to the commencement of construction.

2. SUMMARY OF EVIDENCE

2.1 Next year marks Summerset’s thirtieth anniversary as a reputable retirement village operator that is committed to providing the best quality living environments and standards of care for elderly residents. There is growing demand for housing to support New Zealand's aging population. The Kāpiti Coast District and the wider Greater Wellington region are no exception to this demand trend and there is a significant deficiency of aged care housing.

2.2 Summerset has been searching for an appropriate site that can provide for a comprehensive care retirement village in the Paraparaumu area for five years. Other potential land in the area was carefully considered, but the Ratanui Rd Site was identified as the most appropriate for a range of factors, including its size, close proximity to an existing urban area, and its infrastructure

serviceability. It has also been identified in the Kāpiti Coast District Council's ("**Council**") Growth Strategy – Te Tupu Pai as a "Medium-priority greenfield growth area". This Site will allow Summerset to make a considerable contribution to the housing stock in the Kāpiti Coast.

2.3 The Plan Change seeks to rezone the land from Rural Lifestyle Zone to General Residential Zone under the combined Kāpiti Coast District Plan ("**Plan Change**"). The Plan Change will not only assist in providing much needed residential land but also zone the Site to allow for retirement housing that is purpose-built to provide for the needs of older residents. Creating retirement village housing stock will allow retirees to shift into a future retirement village, freeing up other, often larger housing stock in the Paraparaumu area for others such as young families. Summerset's comprehensive care retirement village will allow residents to 'age in place' and remain connected to their community.

2.4 More generally, the Plan Change will play an important role in achieving positive social and economic outcomes for the wider community, including an investment in excess of $169 million into the region through the construction of a retirement village on the site, with employment provision of approximately 786 FTE over the development period.

2.5 Any future development of the Site enabled by the Plan Change will help to support the long-term growth of Paraparaumu and the Kāpiti Coast District and will be a valuable community asset. Elderly members of the Kāpiti Coast community will have the choice to remain connected to the community that they have spent their lives contributing to. It will also provide further retirement living options for residents from the broader Greater Wellington Region.

3. SCOPE OF EVIDENCE

3.1 This statement of evidence will cover the following:

(a) Summerset's background, including the growing demand for aged care services and the service Summerset provides;

(b) the particular need to support growth in the Kāpiti Coast and specifically Paraparaumu;

(c) an overview of the key aspects of the proposal;

(d) Summerset's consultation on the proposal;

(e) Summerset’s response to the submissions received; and

(f) Summerset's response to the Council Officer's Section 42A Report.

4. BACKGROUND

Reputation and history of Summerset

4.1 Summerset was founded in the Kapiti Coast in 1997 and has been operating across New Zealand for nearly 30 years, and more recently in Australia. Summerset is one of the largest comprehensive care retirement village operator in New Zealand, and one of the largest home builders in New Zealand with a long-established track record of delivering high quality villages into residential communities.

4.2 Summerset has 43 retirement villages in various development stages (either under development or completed) in New Zealand, providing homes for over 9,100 elderly residents, and another eight proposed villages in New Zealand. The expertise that Summerset has developed in caring for elderly residents has resulted in the company being a multiple award winner in the Reader's Digest Trusted Brand Awards in the Aged Care and Retirement Villages category.

4.3 Summerset was founded on a principle of deep respect for its residents, putting them at the heart of everything it does. Summerset is committed to bringing the best of quality living environments and standards of care to the residents that make our villages their home. A high quality, purpose-built village is a core principle of Summerset's philosophy. We are not a developer, rather we are a resident-focused builder, owner and operator of comprehensive care retirement villages. Summerset is recognised as being a leader in the industry.

4.4 Summerset's retirement villages are purpose-built to meet the changing needs of our residents as they age or lose mobility. Application of the principles of Universal Design has resulted in Summerset being the first retirement village operator to have its entire portfolio independently certified as meeting the Lifemark™ for Retirement Villages Design Standards. Lifemark™ is a not-for-profit organisation established to advocate design standards that improve accessibility in housing for the aged or disabled.

4.5 Summerset is New Zealand's first and only net carbonzero retirement village operator, being Toitū net carbonzero certified having measured its greenhouse gas emissions in accordance with ISO 14064-1:2018. In particular, Summerset has offset all unavoidable emissions, and its 2018 target was to reduce operational emissions intensity by 5% by 2022. This target was

exceeded and a 17% reduction over that period was achieved. Through our membership of New Zealand's Climate Leaders' Coalition we set an ambitious science-aligned target late in 2020 to achieve a 62% reduction in emissions intensity by 2032. We developed a carbon reduction roadmap that identifies the key initiatives required over the next 10 years to achieve our science-aligned target.

4.6 We were also New Zealand's first retirement village operator to link sustainability to our funding agreements, incorporating a Sustainability Linked Lending arrangement as part of our bank financing. This sustainability linked lending will support our growth over the next five years and underpins our commitment to achieving our sustainability objectives.

4.7 Summerset is one of a small number of companies in New Zealand that has set public waste diversion targets for construction waste and implements onsite or offsite separation of waste material that has enabled the diversion of 25-75% of waste to landfill across construction sites. This contributes to both reduction of emissions from landfill and costs associated with landfill disposal. Summerset also collaborates with waste contractors regarding waste and recycling removal and has a supplier code of conduct for sustainable procurement.

4.8 The provision of quality, purpose-built retirement villages resulted in Summerset winning a number of awards including winning the Corporate ESG category at the Institute of Financial Professionals New Zealand (INFINZ) 2025 Awards, Summerset St Johns received an Excellence award at the New Zealand Property Council awards in the Retirement Living and Aged Care category and we were named a Customer Champion by the Australian Financial Review. For the seventh consecutive year, we were again named Highly Commended by Reader’s Digest as a Trusted Brand in the Retirement Village category. We also received the New Zealand Aged Care Association's best built environment award for our first memory care centre – an innovative model of care offering apartment style living for people with dementia.

4.9 A series of photos of Summerset villages are attached as **Appendix 1** to provide a sense of what our villages look and feel like.

Demand for aged care services

4.10 The current, unprecedented demand for retirement and aged care living options in New Zealand is a consequence of both an ageing population, and the increase in absolute numbers of elderly people due to the 'wave' of baby-

boomers now reaching their seventies. The total population in the Kāpiti Coast is forecast to rise from 58,000 to between 64,300 and 71,000 in 2048. Stats NZ has projected that by the mid-2030s, it is expected that 30 to 32 percent of Kāpiti Coast will be aged 65 or older compared to 28% in 2024. Further, the amount of people aged 85 years and over is expected to increase the most, significantly contributing to further retirement village and aged care demand.

4.11 Demand is being exacerbated by a reduction in supply through the closure of some smaller, poor quality, aged care homes. Those aged care homes are often conversions of old houses that are simply not fit-for-purpose. Many do not have ensuite amenities, requiring elderly and often vulnerable residents to share bathroom facilities, and they can have a very poor living environment, with inadequate insulation and amenities. These closures have accelerated post the Covid-19 pandemic, particularly due to shortage of nurses and carers and government funding of aged care falling behind rising costs. Over 200 care beds have been lost in Greater Wellington since the pandemic. Impending changes to the Retirement Villages Act 2003 in respect of mandatory buybacks will force even more financial pressure on the smaller, independent operators leading to a decrease in supply of aged care.

4.12 Our elderly deserve a high quality, safe and warm environment, meeting or exceeding modern day Building Code requirements, where they are able to go about their day-to-day lives comfortably and safely. These are things Summerset prides itself on.

4.13 There is a continuing preference towards aged care housing options that provide a fit for purpose continuum of care approach to retirement living that allow residents to live comfortably and independently in one location for longer, with additional support at hand when it is needed. These types of villages are widely considered to be the modern standard when it comes to aged care living and this is where we are seeing significant demand.

Summerset's solution to support growth in the Kāpiti Coast District

4.14 Creating enough villages to meet demand is challenging, first and foremost due to a lack of suitably large, residentially-zoned sites. Where those rare residential sites cannot be found, we must look for non-residentially-zoned land in strategic locations and make formal applications to rezone it for residential purposes.

4.15 'Retirement village' is an umbrella term given to all types of communal retirement living. There are, however, two different types of retirement

villages: comprehensive care villages; and lifestyle villages. Each village type attracts a different resident demographic:

(a) Comprehensive care retirement villages provide a full range of living options to residents, from independent living, serviced or assisted living, through to a full range of rest-home and hospital-level care including dementia.

(b) Lifestyle retirement villages provide predominantly independent living units with, in some cases, a small amount of aged care which might be sourced from outside the village. If a resident becomes frail or in need of specific care, usually they would be forced to move from their lifestyle village to an aged-care facility or comprehensive care village. Relocating into a new and unfamiliar environment at this time can be very stressful to a resident, especially if leaving a spouse or partner behind.

4.16 At Summerset we only build comprehensive care retirement villages. The average entry age of residents is 80, with an average age of mid-80s once a village is fully occupied (the age profile of residents in a typical Summerset village is 80 to 83 years old in independent living units, and mid-to-late 80s in serviced and aged care). Our residents often choose to live in their own homes for as long as they can manage. Lifestyle villages, however, cater for a younger cohort with an average resident age being approximately late 60s.

4.17 Our ability to provide a continuum of care from an independent lifestyle through to 24-hour nursing care in a secure environment, all within the same site, is very important. A site offering a full range of living and care options means that residents can 'age in place' without moving from neighbourhood to neighbourhood, which is particularly disruptive at the age and physical state of our typical resident. It also allows couples to remain close to each other despite any differences in the level of care that they require individually. For example, a wife might remain in an independent apartment when a husband's health demands that he move into the adjacent rest-home.

4.18 Many of our elderly residents have chronic medical conditions when they move into the village. They are often beginning to experience reduced mobility and age-related memory impairment. Many will be widows or widowers. Companionship, safety, security and ease of access to village amenities are crucial factors in their decision to move in. The layout and environment of Summerset's villages are primarily designed to meet the specific physical and social needs of the elderly people that will reside there.

4.19 Summerset villages provide extensive onsite amenities – including a pool, café, bar, gymnasium, theatre, library, communal sitting areas, activities area, and substantial landscaped gardens and outdoor amenity spaces such as a bowling green and BBQ areas. These features lead to significant positive benefits for residents in both the enjoyment of their twilight years and their mental and physical wellness. The inclusion of these amenities is also a contributor to the required density and form of the modern-day retirement village. The effect of providing these amenities on site is a lesser need for residents to travel beyond the village to enjoy such activities or recreation.

4.20 Summerset takes care to ensure that its villages are blended or integrated into the surrounding residential communities and the local environment, and we aim for each village to be a valued contributor to the health and diversity of the community it sits within. This is vitally important so that the residents continue to function as an integral part of their community. By locating villages within the residential areas they know and enjoy, the residents are able to access local services and amenities that are already familiar to them.

4.21 Summerset's retirement villages typically include around 200-250 dwellings spread over a site area of 8-10 hectares. The sale of our new residents' existing dwellings releases approximately 250+ homes back onto the market to be more efficiently utilised again by those requiring larger dwellings. This equates to approximately 20 to 30 hectares of residential homes in the area.

4.22 Summerset's comprehensive care retirement villages do not place the same level of demand on various elements of public infrastructure when compared to an equivalent number of residential household units. This is in part due to the lower household occupancy rates of retirement villages (the average independent unit occupancy rate in a Summerset retirement village is approximately 1.3 persons per unit), the largely passive lifestyle of the village residents and the extensive amenities provided on site. A key example of this difference is in transport. Many residents either drive infrequently at off-peak times, or not at all. Summerset villages provide shuttle bus services for residents and provide connections to public transport and pedestrian and cycling facilities. Mr Georgeson addresses transport effects from development of the Site in further detail in his evidence.

4.23 Summerset understands that making the decision to move into a retirement village is one of the biggest decisions that a person can make in their lifetime. We therefore aim to ensure that our residents are highly satisfied with the services and amenities offered by Summerset's villages. Regular resident satisfaction surveys are undertaken to gauge residents' satisfaction on the

level of services and amenities provided in our villages. The results of these surveys are extremely important to Summerset.

4.24 The results of the latest survey returned a satisfaction score of 97%, indicating satisfied or very satisfied residents.

5. SUPPORTING GROWTH IN PARAPARAUMU, KĀPITI AND GREATER WELLINGTON

5.1 Kāpiti Coast District has underlying demand for approximately 2,750 new retirement units over the next 30 years. At present there are approximately 1,380 retirement units with the potential for that to increase to 1,730 units in the medium to long term as know village developments are completed. There is demand for an additional 200 in the short term and a long-term shortfall of 1,000 to 1,200.[1]

5.2 Paraparaumu is the largest town in the Kāpiti District and is forecast to grow significantly over the coming decades. This village's catchment will draw predominately from Paraparaumu given the proximity to the metropolitan centre. It will also likely be attractive to the wider Kāpiti Coast population.

6. SITE SELECTION

6.1 Suitable sites for comprehensive care retirement villages are rare, for the reasons explained below, and Summerset has been looking for an appropriate site in the Paraparaumu area for more than five years.

Criteria for site selection

6.2 Given the unique needs of elderly residents and the services outlined above that a comprehensive care retirement village provides, there are specific criteria for selecting sites that must be met before we can contemplate development. These criteria include:

(a) flat land area of at least 8-10ha with an aspect ratio that caters for the unique spatial requirements of the village, including the large main building and various amenities.

[1] Evidence of Mr Heath (Economic) on behalf of the Applicant dated 16 January 2026 at 4.10.

(b) close proximity to retail and services. Easy access to a town like Paraparaumu allows residents to use supermarkets, pharmacies, medical services, banking, libraries and more.

(c) good proximity to other residential neighbourhoods and easy connection with required infrastructure such as roading, utilities and service connections.

(d) close proximity to community amenities and activities. Although the majority of Summerset's residents are not high frequency users of them, this proximity is important for visiting families to utilise, for example walking tracks, parks and playgrounds.

(e) opportunity for high quality amenity and views that will enhance the residents' day to day quality of life.

6.3 Based on our extensive experience in developing and operating high quality comprehensive care retirement villages, if a site does not meet these core criteria, it is not deemed suitable or viable for a Summerset retirement village. We have developed denser, taller villages in highly populated metropolitan areas such as Auckland. However, for this Site we would utilise our regional, low-rise village designs which better reflect the character and lifestyle expected by residents in the Kāpiti Coast.

Alternative sites considered in the Kāpiti Coast District

6.4 We have investigated a number of alternative sites across the Greater Wellington Region. Due to confidentiality and commercial sensitivity reasons, we are not able to provide specific details about the locations of the sites assessed, but generally those were not pursued due to one or more of the following reasons:

(a) Site sizes were insufficient for the sustainability of a modern Summerset village which include economies of scale, operational sustainability through integrated care models, staffing efficiencies and greater amenities & services;

(b) Sites were not adequately serviced or serviceable for three waters infrastructure;

(c) Sites were located too far away from local amenities;

(d) Sites had challenging topographies, making safe walking and driving gradients for the elderly unachievable;

(e) Sites had unsuitable geotechnical conditions making development unfeasible;

(f) Sites had poor local roading transport connections;

(g) Sites were too far from core population base, making development risk to high due to reduced demand potential; and

(h) Sites were not zoned residential, or considered suitable for rezoning to residential

Appropriateness of the Site for a comprehensive care retirement village

6.5 After considering a range of sites, the Site was considered appropriate for a retirement village because it best fit the criteria above, and it:

(a) is proximate to the Kāpiti Coastline; and

(b) is adjoining residential and proximate to the Paraparaumu Metropolitan area, meaning the Site is not isolated from existing residential land use and existing roads and services will be available.

6.6 The Site is also an opportunity for Summerset to make a substantial positive contribution towards meeting the growing needs of elderly people in the Kāpiti Coast District and the wider Greater Wellington region.

7. PLAN CHANGE

7.1 Bringing the best of life to residents is at the heart of everything that we do. If this Plan Change application is successful, we propose to use the majority of the Site for a Summerset comprehensive care retirement village.

7.2 Our future village will provide a wide range of much needed living options for elderly members of the Kāpiti Coast community. The future village will provide a continuum of care from independent living units, assisted living suites, rest home and hospital care.

7.3 Any future development of the Site containing a retirement village will be specifically designed and will require future resource consent applications, which will be subject to detailed and considered assessments. Key features and benefits of the future village that the community could expect from my perspective are:

(a) The provision of a much needed high-quality community amenity for the elderly residents of the Kāpiti District. The district needs more retirement housing supply.

(b) A significant contribution to the supply of residential land for Kāpiti and the surrounding area. This can be achieved with minimal impact upon the public infrastructure network.

(c) Investment in excess of $160m into the local economy and the generation of 481 FTE jobs .

(d) Effortless integration of the village with the Otaihanga community.

7.4 Based on these factors, the obvious plan of action was to apply for the Plan Change to amend the zoning to allow for the proposed development in an area that is already identified as a "medium-priority greenfield growth area" in the Kāpiti Coast Growth Strategy. Should the Panel be minded to approve the Plan Change, Summerset plans to seek resource consent for a comprehensive care retirement village as soon as possible.

8. CONSULTATION

8.1 Summerset has significant experience in establishing and operating retirement villages throughout New Zealand, we have worked alongside many communities to address concerns they may hold regarding our proposed villages.

8.2 We directly manage the construction of our own villages, so our Summerset site supervisors have a vested interest in ensuring all environmental, health and safety, consent compliance and other matters are managed in a best practice manner.

8.3 Over time, we have been able to use stakeholder feedback to continually improve successive village designs, for example optimally locating or orienting buildings to minimise shading or adverse effects on privacy. However, each area and site is different, and specific local input is important to us. It gives us a better understanding of our neighbours and other stakeholder concerns.

8.4 Our proactive approach to consultation helps us to establish excellent relationships with our neighbours across the country. Another factor is our considerate approach to construction and consequential village operations. In my experience it is extremely rare for any of the negative perceptions of having

a retirement village as a neighbour to come to fruition. We want to work with, and integrate into, the community that we operate within. We are long term neighbours, not a developer in the business of making short term profits without ongoing obligations to community.

8.5 There were five key stakeholders identified in our consultation process:

(a) Kāpiti Coast District Council.

(b) Greater Wellington Regional Council.

(c) Ātiawa Ki Whakarongotai.

(d) Ngā Hapū o Ōtaki.

(e) Ngāti Toa Rangatira.

8.6 Wider community consultation was also undertaken following lodgement of the application, which consisted of a letter drop to adjacent neighbours and a drop in evening advertised in local public notices.

Kāpiti Coast District Council

8.7 Summerset has been proactively engaging with Council since 2024, firstly during our acquisition due diligence and lately in connection with this Private Plan Change Request. The consultation informed the master planning for the project, including the features set out in the proposed structure plan relating to roading, stormwater and landscaping.

Greater Wellington Regional Council

8.8 Summerset has been proactively engaging with Council since 2024 as part of due-diligence and then as part of this Private Plan Change Request. This consultation has informed the design of the Project, in particular to ensure that any works that will be proposed in wetlands be undertaken in a manner that addresses environmental effects through the application of the effects management hierarchy.

Ātiawa Ki Whakarongotai

8.9 Summerset engaged with Ātiawa in October 2024 with regard to the Private Plan Change Request for the Site. Ātiawa subsequently provided a letter of support for the Private Plan Change Request. Ātiawa outlined the history of their association to the area, including an historical pa in the wider Otaihanga area. Ātiawa indicated that they would be interested in the ecological, water

and archaeological aspects of the Project. This consultation has informed the design of the Project, including taking a careful approach to managing environmental effects and ensuring indigenous species are planted as part of the wetlands restoration.

Ngā Hapū o Ōtaki

8.10 Summerset held a hui with Ngā Hapū in November 2024 with regard to the Private Plan Change Request for the Site. Ngā Hapū confirmed their interest in the Request, but stated they would defer to Ātiawa on the technical detail.

Ngāti Toa Rangatira

8.11 Summerset held a hui with Ngā Hapū in November 2024 with regard to the Private Plan Change Request. Ngāti Toa Rangatira subsequently provided a letter of support for the Private Plan Change Request.

9. RESPONSE TO SUBMISSIONS

9.1 The application was publicly notified on 30 May 2025. Eighteen submissions were received, with two further submissions received.

9.2 I appreciate the time and effort taken by those who have made submissions. I am confident that all matters raised in the submission process can be adequately addressed and I want to provide comfort to submitters that a future village and / or residential development will integrate seamlessly into the existing environment without adverse effects.

9.3 Whilst the proposed retirement village can not replicate the neighbouring rural environment, Summerset has a proven track record of delivering attractive, award-winning villages that are specifically designed to blend into and be complimentary to their surrounds by harnessing local flora and fauna themes and implementing these into bespoke landscaped environments.

9.4 Summerset is the long-term owner of its villages, so careful consideration and execution of design and construction is of upmost importance to ensure the village not only functions well, but equally has visual appeal for our residents and neighbours for the entire life of the village.

9.5 There are many elderly in the Greater Wellington region who desperately want to move into a village where there is support, care and company. Our existing Paraparaumu & Waikanae Villages have 291 & 573 active prospects

respectively. Our future village will have specifically designed accommodation and amenities that will enable them to best enjoy their later years of life.

10. CONCLUSION

10.1 Summerset is a long-standing, reputable and awarded retirement village operator that is committed to providing the best quality living environments and standards of care for its residents.

10.2 Retirement villages are an important component of housing growth options with unique demand factors, which should be planned and provided for by statutory authorities.

10.3 The need for housing, particularly retirement villages will continue to increase in Kapiti. The Plan Change will not only assist in providing much needed residential land but also zone the Site to allow for housing that is purpose-built to provide for the needs of older residents.

10.4 Suitable land for retirement living development is rare but the Site meets all specific criteria aside from not being residentially zoned. It is, however, identified by Council as a 'medium-priority greenfield growth area'.

10.5 The Plan Change will play an important role in achieving positive social and economic outcomes for the wider community. Any future development of the Site enabled by the Plan Change will be a valuable community asset and will ensure that the elderly members of the wider community have the choice to remain living in the community they have spent their lives contributing to.

Aaron Smail

16 February 2026

APPENDIX 1

Photos of Summerset Village






Property
Requests




147
Summerset
on Cavendish




























183










DiViNE
CAFE



