

**Long-Term Plan Workshop**  
**ATTACHMENTS - UNDER SEPARATE COVER**

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**Date:** Thursday 19 March 2026  
**Time:** 9.30 am  
**Venue:** Camellia Chambers, Civic Offices,  
53 Hereford Street, Christchurch

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# LTP 2027 – 2037 Environmental Scan

19 March 2025

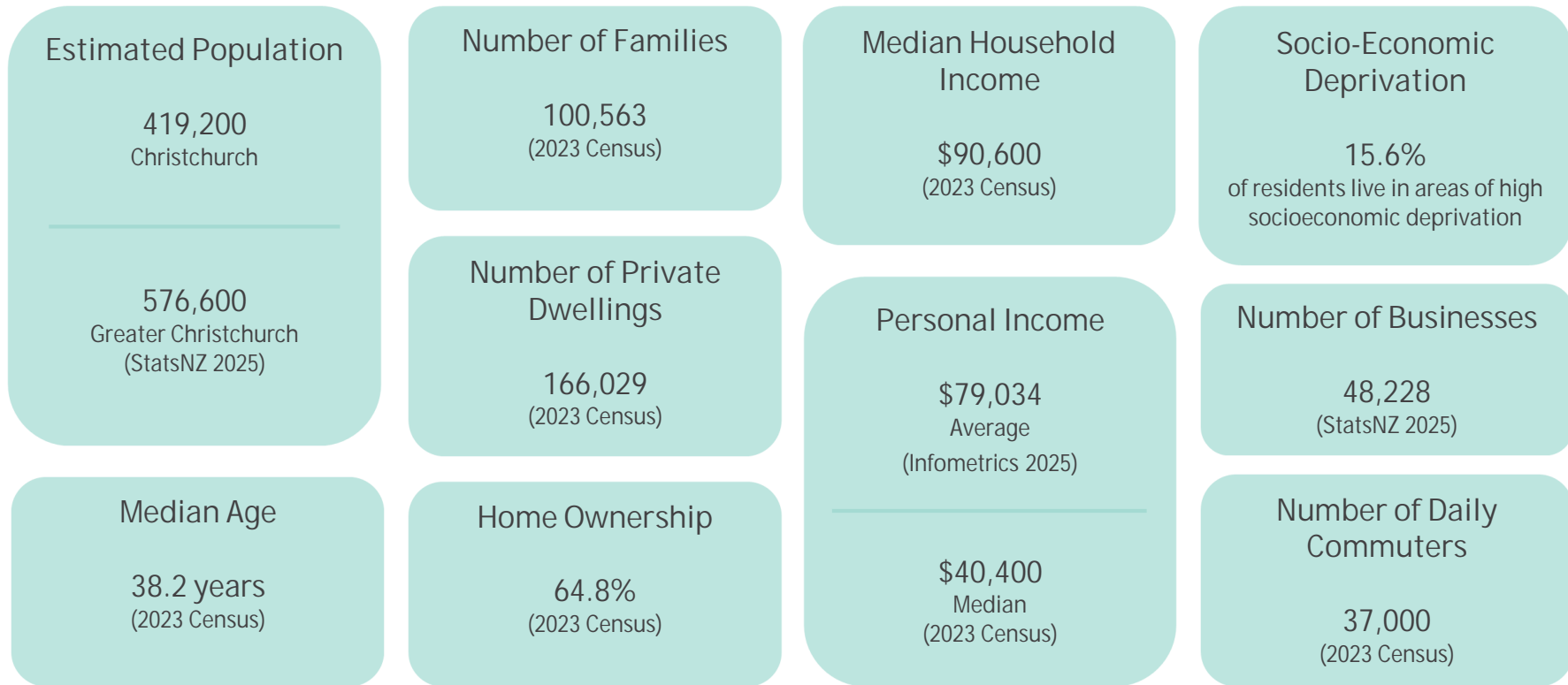
## A little context...

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- The purpose of this scan is to help set the context for Elected Members and staff as we begin developing the 2027–2037 Long Term Plan.
- Our operating environment is evolving rapidly. Changes are happening quickly, and being adaptable will help us respond effectively.

# Setting the Scene

## Christchurch at a Glance



18 March 2026

## We're becoming more diverse...

Nearly a third  
of Christchurch residents  
were born overseas.

17.5 years  
Average time overseas-born  
residents have lived in  
New Zealand

#2  
Asian is now our second  
largest ethnic group

Areas with the highest proportion of  
overseas-born residents:

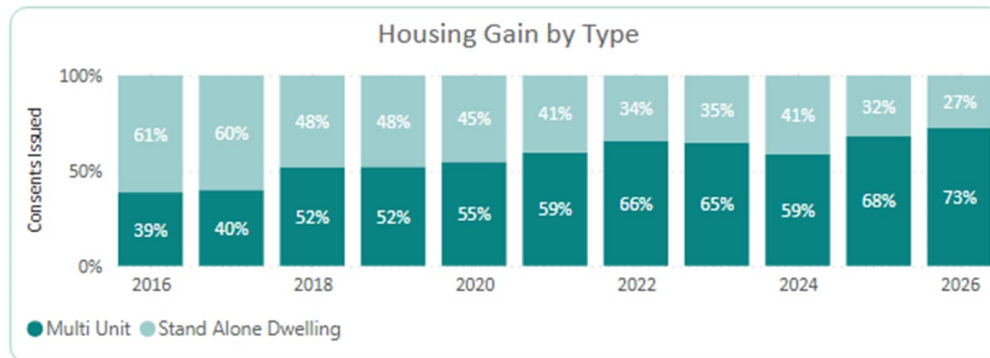
Wigram  
Riccarton  
Central City  
Upper Riccarton  
Sockburn

67% of population growth in 2025  
was driven by people choosing Christchurch,  
either moving here from overseas or  
elsewhere in New Zealand



## Recent Growth

- Over the last 10 years, on average 2,600 new homes have been consented annually, with a total of 26,568 additional homes consented over this period.
- On average 55% of new homes built in the past 10 years have been multi-unit dwellings.
- Stats NZ estimates our population has grown by around 44,000 people over the past 10 years, while Selwyn and Waimakariri together have grown by roughly 42,000 over the same period.



### What does this mean for Christchurch & the Council?

Christchurch's ongoing population growth is reinforcing the need for long-term planning around housing, transport, infrastructure, and services to accommodate sustained, long-term growth.

Growing multi-unit housing will likely increase demand for higher-density services and may change how we recover rates and fund infrastructure.

Commuter pressure is intensifying. A large and growing number of residents from Selwyn and Waimakariri commute into Christchurch for work, now around 40% of each district's working population.

As Christchurch grows more diverse, the Council may need to ensure our planning meets varied needs and understand where those needs may compete.

# Community Outcomes Progress

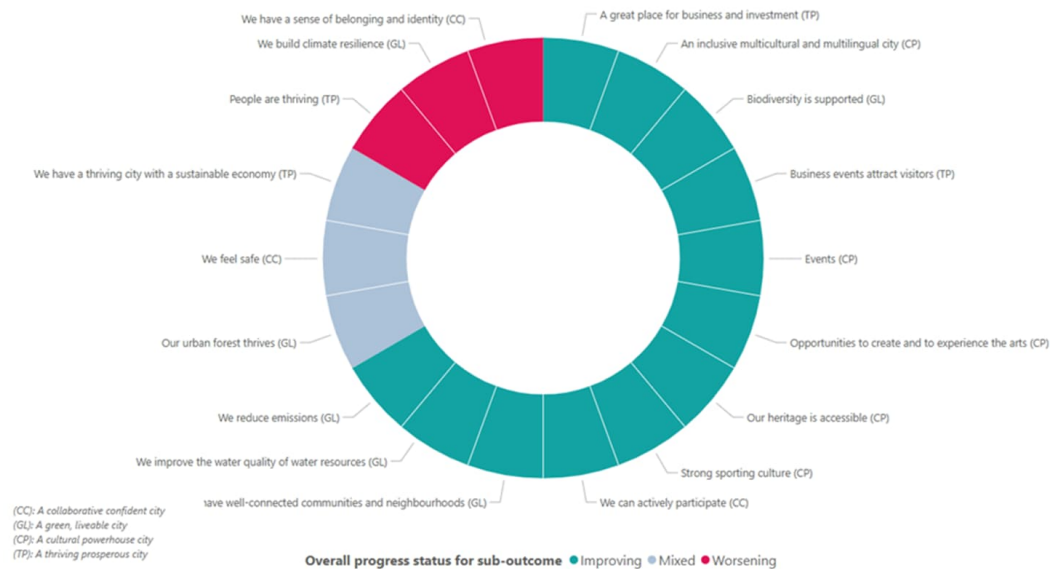
We have four Community Outcomes

- A collaborative confident city
- A green, liveable city
- A cultural powerhouse city
- A thriving prosperous city

*The outcomes are further broken down to 18 sub-outcome components which outline what success looks like.*

The sub-outcomes are monitored via key indicators, which measure progress towards our community outcomes.

- 12 sub-outcomes are improving or progressing in a positive direction
- 3 sub-outcomes have mixed results
- 3 sub-outcomes are worsening or heading in the wrong direction



## Community Outcomes Progress

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Levels of service delivering to community outcomes:

Levels of Service (LOS) as adopted through the LTP process are each linked to community outcomes.

Based on year-end 2024/2025 performance reporting, each outcome had at least 85% of its aligned Level of Service measures meeting target.

- Collaborative & Confident City: 89% of LOS aligned to this outcome met target
- Cultural Powerhouse City: 96% of LOS aligned to this outcome met target
- Green Liveable City: 85% of LOS aligned to this outcome met target
- Thriving and Prosperous City: 90% of LOS aligned to this outcome met target

# Community Feedback and Expectations

Feedback on the 2023 and 2025 annual plans, and the 2024 Long Term Plan, have highlighted several consistent themes.

**Balancing services and affordability**  
Balancing service levels with affordable rates remains challenging, with differing views on rate increases and ongoing concern about intergenerational equity.

**Efficiency and prioritisation**  
Submitters often call for greater efficiency and a focus on “the basics” but struggle to identify specific areas where spending could be reduced.

**Divergent views on core services**  
There's no consensus on what constitutes “core” services, with submitters divided on which services and investments are essential and which ones are expendable.

**Strong support for investment in core infrastructure**  
Investment in water, parks, and community facilities is consistently supported, with many emphasising the social and cultural value of libraries, parks, and community centres.

**Transport investment debates**  
Transport spending is contentious. While many support improvements for safety and mode shift, others oppose them due to costs, low usage, and disruption.

**Climate action expectations**  
There's a growing expectation for Council action on climate change, though some remain sceptical about the urgency or governance of climate spending, viewing it as less pressing than immediate financial pressures.

**Calls for transparency and engagement**  
Submitters regularly seek greater transparency, clearer communication about finances and priorities, and more meaningful community engagement, particularly on contentious issues and major projects.

What does this mean for the Council?

Residents hold diverse and often competing views on rates, services, efficiency, and long-term investment, leading to tension between affordability, service.

Balancing today's needs with future generations' interests remains a core challenge, with intergenerational equity consistently raised in community feedback.

Council may need to consider how best to balance these perspectives in a way that reflects shared priorities and respects the often-varied views of residents.

# Looking Ahead

## Global Geopolitical Environment and Influences

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*“A world ordered for decades by globalisation and geoeconomics has quickly become a world grounded in geopolitical risk.”  
(S&P Global)*

Five critical trends that New Zealand businesses should consider:

- Tectonic shifts in power, economic centres and trade
- A complex, fragmented regulatory and tax environment
- A fast-moving and politicised technology landscape
- Multiple threats to supply chains, assets and infrastructure
- Demographic, technological and cultural pressures on workforces

['Top Geopolitical Risks 2025' \(KPMG\)](#)

## Global Economic Outlook

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*Despite ongoing shocks throughout 2020 – 2025, the global economy remained resilient – but the outlook is fragile.*

### Global GDP Growth Projections

2026: 2.7% - 3.3%  
2027: 2.9% - 3.2%

- Global economic growth projections reflect ongoing challenges including weak investment, low productivity, and high debt. (UN DESA; IMF; World Bank)
- Broadly agreed that economic growth will decrease slightly in 2026, driven by sustained trade tensions and geopolitical risk and uncertainty.
- Globally, inflation is expected to ease in 2026 and 2027; geopolitical tension flare-ups remain a risk to global economic stability.

## National Economic Outlook

CPI: 3.1% (year to Dec 2025)

OCR: 2.25% (Feb 2026)

Unemployment Rate: 5.4% (Dec 2025)

- Inflation is currently sitting at 3.1%, just above the Reserve Bank's 1–3% target range.
- Forecasts had suggested inflation would ease back toward the 2% midpoint by mid-2026, supported by earlier indications of declining price pressures.
- However, emerging geopolitical developments are expected to place renewed upward pressure on inflation in the short to medium term.

How is geopolitics likely to shape the national economy?

*"In our view, there are a few key economic effects for New Zealand. In order of relative importance, they are as follows." (Infometrics, 2026)*

Energy Costs: Oil prices remain the main concern globally and for New Zealand.

Trade: New Zealand's export-driven economy depends on stable global markets. Exports to the Gulf Cooperation Council totalled \$3.25 billion in the year to September 2025, mostly dairy and meat.

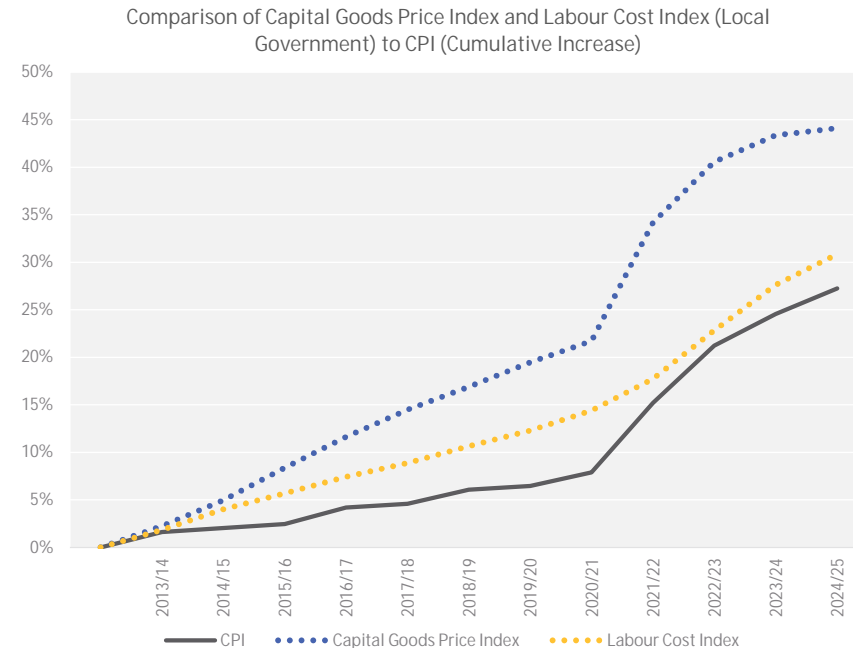
Investment: Conflict generally dampens business confidence, though market reaction has been limited so far; the S&P 500 has fallen 0.9% since late last week.

Travel: Major airports have been heavily disrupted by airspace closures and missile/drone risks, affecting over a million passengers.

# Cost of Doing Business

*Local government is facing growing public expectations, tight budgets, and growing demands for transparency.*

- Infometrics estimates that local government operating costs rose by a cumulative 19% between 2021 and 2023, with increases peaking above the rate of household inflation (CPI).
- Council interest costs reached \$1.3 billion in the year to Sept 2023 (up 64% since before the pandemic) and now account for nearly 9% of operating spending.
- Labour costs for local government in the year to 2023 accounted for approximately one fifth of annual operating expenses.
- There is rising demand from the community for services, funding, and infrastructure amid pressure to keep rates affordable.

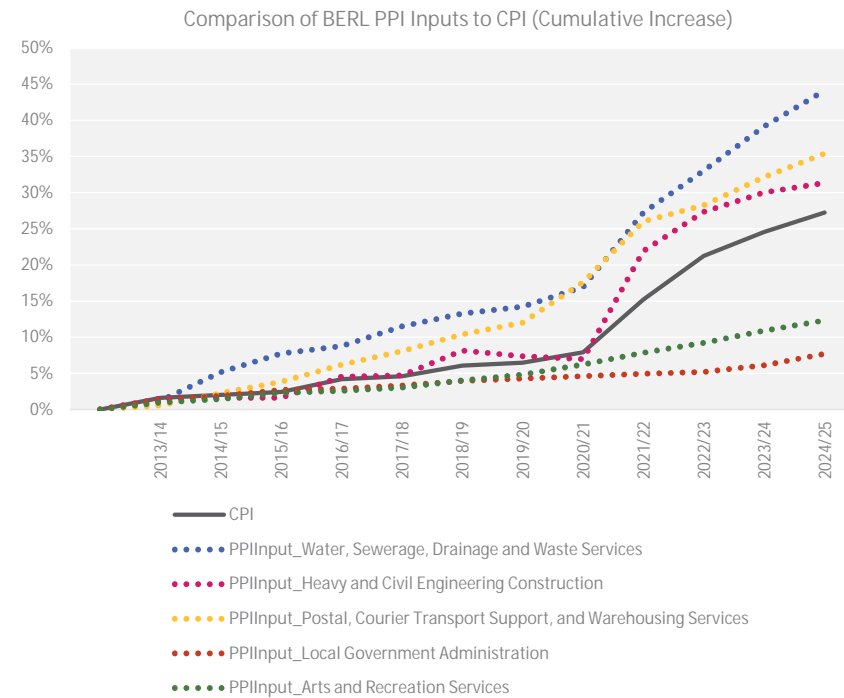


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# Cost of Doing Business | Capital

- National infrastructure demand remains high, with over \$125 billion in the Te Waihanga pipeline and strong competition for contractors, materials, and skills.
- Construction market pressures continue. Nationally, job losses in construction are notable, with filled roles down 5.1% in the past year.
- Council faces increasing financial and deliverability pressures, including higher-than-planned inflation, added operating costs from new assets, and a growing capital programme.

With compounding inflation, higher capital goods prices, and external market pressures, Council may need to find a balance between maintaining service levels, delivering major projects, and managing rates impacts.



# Affordability

Median Household Income  
\$90,600  
(2023 Census)

Average Household Income  
\$116,923  
(Infometrics 2025)

Household Income Growth  
0.2% year to March 2025  
(Infometrics 2025)

Long Term Affordability  
28%  
think housing affordability will impact their ability to  
continue to live in Christchurch in the long term  
(Life in Christchurch, 2025)

- The average house value in Christchurch is 6.4 times its average household income; the average weekly rent accounts for 22.9% of the average household income.(Infometrics, 2025)
- At 30 June 2025, the balance of unpaid rates invoices in Christchurch was \$34.5 million.
- Christchurch City Council granted about 11,120 rates rebates in 2024/25 and \$6.2 million in rates remissions.
- Christchurch's ageing population is projected to grow significantly, with those aged 65 years and over increasing from 16% in 2023 to 26% by 2073.

## What does this mean for the Council?

With household incomes lagging behind living costs, more residents are under financial strain, increasing scrutiny of rates and expectations for value for money.

Rising arrears indicate that more households are struggling to pay rates on time. More households experiencing hardship could increase demand for rates remissions, postponements, or other support.

As the proportion of older residents grows, there may be increased pressure to keep rates low and maintain accessible services. Council will need to balance affordability concerns with investment in infrastructure and services that meet changing demographic needs.

## Trust and Confidence

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*Key measures of trust and social wellbeing are declining throughout New Zealand*

- Just over a third (37%) of residents feel that the public have at least some influence on the decisions that the Council makes. (QoL 2024)
- 38% agree that the Council makes decisions in the best interest of the city. (QoL 2024)
- Trust in institutions (e.g. the health system, parliament and media) are at their lowest in New Zealand since 2014. (StatsNZ, 2023)
- People were also asked to rate their trust in most people in New Zealand. This also decreased, from 6.7 out of 10 in 2021 to 6.5 in 2023. (StatsNZ, 2023)
- Compared with Australia, New Zealand scores lower on four of the five dimensions of social cohesion. In 2024, 49% of New Zealanders agreed with positive statements indicating social cohesion, compared with 56% in Australia (Helen Clark Foundation, 2025).

What does this mean for the Council?

Public confidence is becoming harder to gain and to maintain in an environment of declining institutional trust. Social cohesion and trust in institutions are under increasing pressure globally, nationally, and online. Christchurch is unlikely to remain immune.

While it has been improving, trust and confidence in decision making remains low. Council decisions can have long-term effects on communities; it is important that they have trust and confidence in the decision-making process.

The Council may wish to reflect on the valuable role elected members can play in building public trust and confidence in governance and decision-making. Particularly through fostering open, respectful, and constructive dialogue, both in Council meetings, on social media, and in their engagement with the wider community.

It's worth noting how strong community connections and social cohesion have supported Christchurch through the challenges of the past 15 years. If fewer people feel that these connections matter, it may signal weakening social ties that underpin collective resilience and wellbeing during times of pressure or crisis.

## People, Capacity & Capability

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- Christchurch is not currently facing a skills shortage, thanks to its relative attractiveness compared to other New Zealand cities.
- This creates a valuable opportunity to actively promote the city as a destination for skilled workers and strengthen its future workforce.
- Between 2018 and 2023, the share of New Zealanders in professional roles rose from 23% to 27%, employment in labouring (11% to 9%), sales (9.2% to 7.8%), and community and personal services (9.5% to 9.0%) declined. (Stats NZ, 2023)
- As of 1 March 2024, total union membership in New Zealand was 425,761, representing 14.5% of employees in the labour force. This marks a 10% increase compared to the previous year. (MBIE)
- Skills shortages, long procurement lead-times, and limited tender responses are constraining capital project delivery. Construction jobs are down 5.1% nationally, and labour outflows to Australia risks worsening shortages if demand rebounds.

### What does this mean for the Council?

Councils are navigating a complex workforce landscape shaped by demographic shifts, public sector reforms, evolving employee expectations, and rapid technological change. An increase in turnover and competition for highly skilled roles pose risks to service delivery, while trends like flexible working and AI integration highlight the need to consider how we can best attract, support, and retain talent.

The growing shift toward professional occupations may negatively impact contractors who deliver our capital programme. In a smaller labour market, workforce competition could lead to delivery challenges and potential cost escalation.

Maintaining positive relationships with unions that represent a large part of our workforce helps create stability and supports positive employee engagement, both of which are critical for consistent service delivery.

A change of government in New Zealand next year could either lead to further public sector workforce reductions or expansion of government agencies, both of which would significantly affect labour market dynamics and competition for skilled workers.

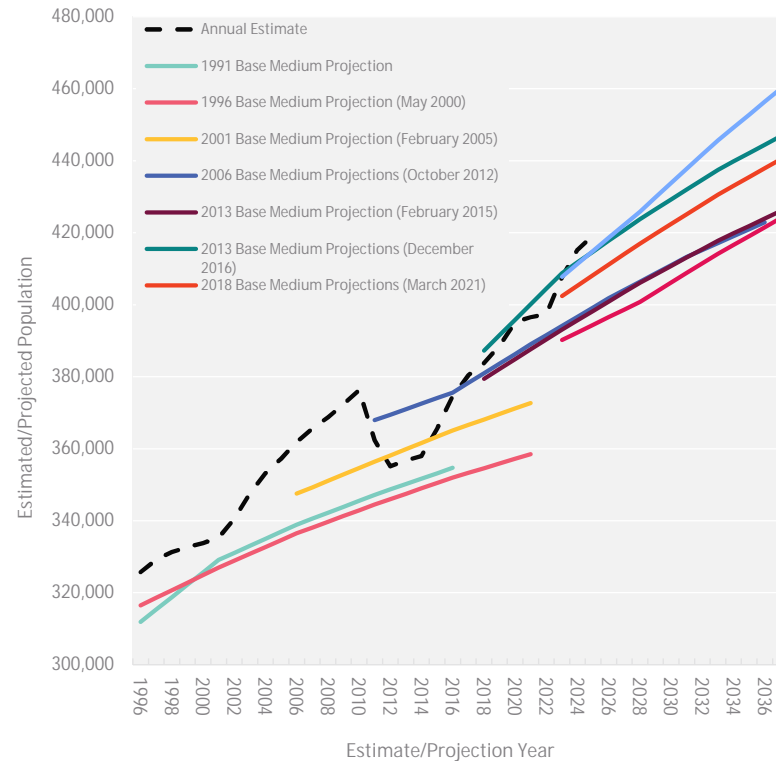
# Future Growth

# LTP Growth Assumptions

Which projections are we using?  
Stats NZ Subnational Population and Household Projections

Which scenario are we using?  
The medium growth scenario. Typically growth in Christchurch has tracked closely with the medium projection, and it remains a reliable indicator of future growth.

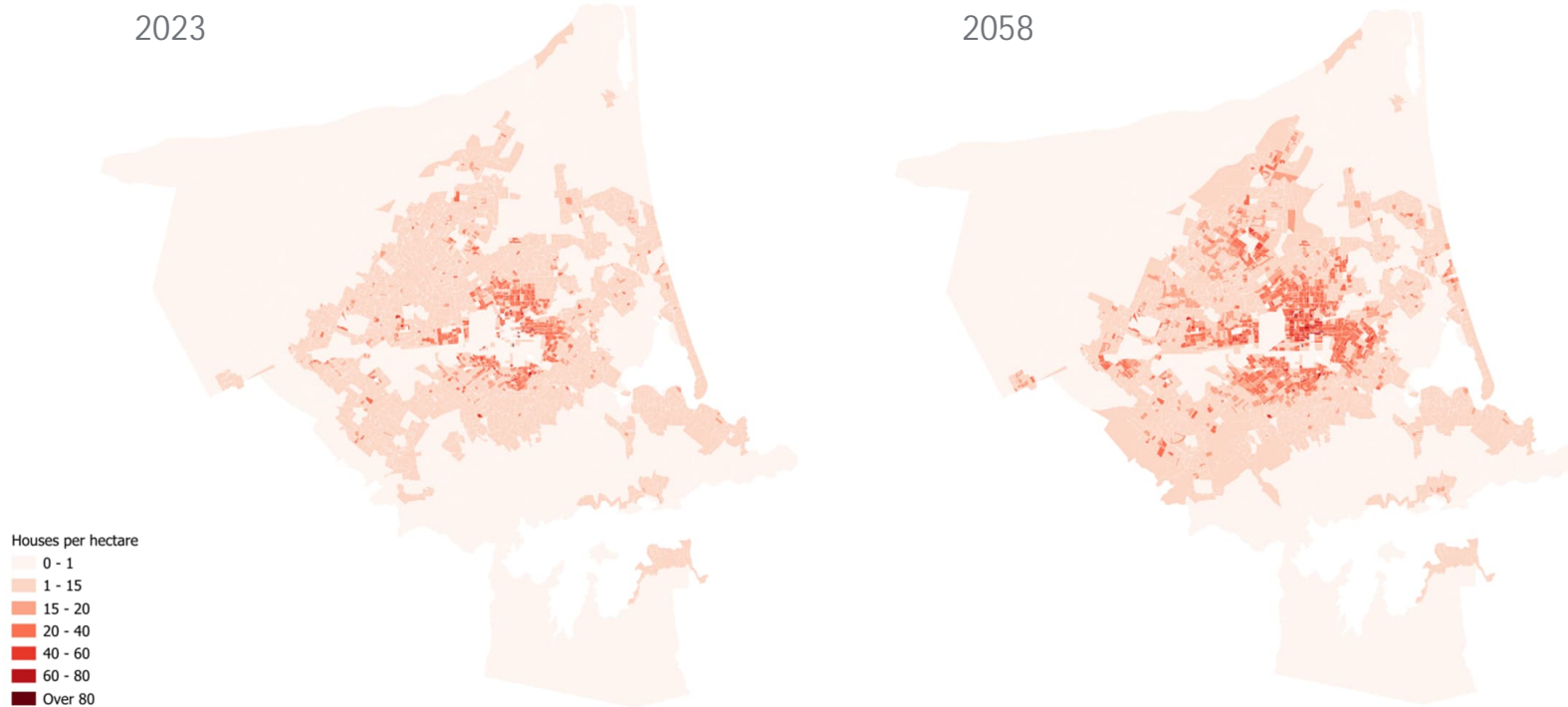
Why the Stats NZ projections?  
Stats NZ are well placed to provide future growth projections in New Zealand. They have access to a range of official datasets that inform the development of the projections, and they revise their projections regularly to consider current trends and issues.



# LTP Growth Assumptions

Period	2023 - 2083
Projection	Medium Projection (StatsNZ, 2023 Base Population Projections)
Infill/Greenfield Split	Approximately 60% infill, 40% greenfield in short - medium term Transitioning to 70% - 80% infill, 20% - 30% greenfield in the long term
Greenfield Assumptions	Assumes current zoned greenfields taken up by 2053. Assumes a small amount of additional greenfield capacity across modelling period.
Infill Assumptions	Assumes the following shifts in the share of growth allocated to each sector between 2023 and 2083: Medium Density: 11.5% - 35% High Density: 9.5% - 21% Suburban: 15% - 10%

# Most Likely Scenario



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## LTP Growth Projections

Year	Population Projection	Average Household Size	Household Projection	Projected Household Growth	Competitiveness Margin	Household Growth + Competitiveness Margin
2027	422,260	2.6	162,408			
2037	459,940	2.6	176,900	+14,492 (2027 – 2037)	+20%	178,543
2057	519,960	2.5	207,984	+45,576 (2027 – 2057)	+15%	209,244

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Questions?

# Community Outcomes

## Our Community Outcomes



### **A collaborative, confident city**

Our residents have the opportunity to actively participate in community and city life, have a strong sense of belonging and identity, and feel safe.



### **A green, liveable city**

Our neighbourhoods and communities are accessible and well-connected, supporting our goals to reduce emissions, build climate resilience and protect and regenerate the environment.



### **A cultural powerhouse city**

Our diverse communities are supported to understand and protect their heritage, pursue their arts, cultural and sporting interests, and contribute to making our city a creative, cultural and events powerhouse.



### **A thriving, prosperous city**

Our city is a great place for people, business, and investment where we can all grow our potential, where enterprises are innovative and smart, and where together we raise productivity and reduce emissions.