



# Greater Christchurch Spatial Plan Annual Report 2025



**Greater Christchurch  
Partnership**

**Te Tira Tū Tahi**  
One Group, Standing Together

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## Introduction

Monitoring is a critical component in ensuring the Greater Christchurch Partnership (GCP) is achieving the opportunities, directions and key moves set out in the [Greater Christchurch Spatial Plan \(GCSP\)](#), and for reporting progress on implementation of the joint work programme.

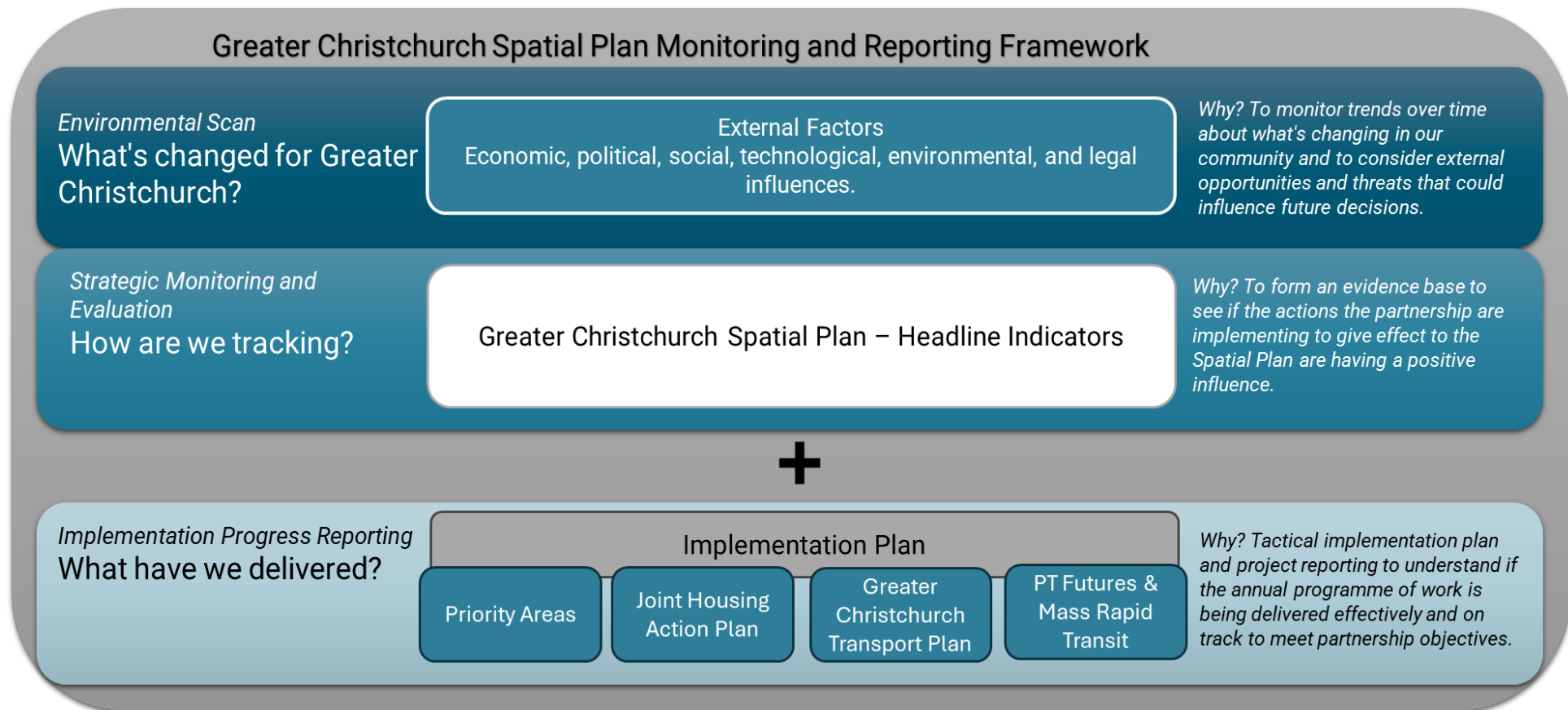
As the Greater Christchurch Spatial Plan has a 30-year horizon, progress will take time and the external environment the partnership operates within will change. Monitoring key indicators over time will show whether trends are heading in the right direction and help the partnership to assess the effectiveness of its implementation actions. The framework will enable future decision-makers to track progress against the intent of the plan, enabling them to identify where progress is consistent with the partnership's aspirations, or where it is off track, and a different approach may be required.

This is the first annual report for the partnership. It's just over a year since the Greater Christchurch Spatial Plan was adopted by all partner Councils as their Future Development Strategy in March 2024. It aims to provide an overview of the approach to monitoring and reporting, and where the data is available and sets a baseline for future reporting. It should be noted that the Spatial Plan is still in the early stages of implementation for many projects and initiatives.

## The Greater Christchurch Spatial Plan Monitoring and Reporting Framework

The proposed framework needs to reflect the external environment as well as specific Spatial Plan headline indicators and implementation action progress. Figure 1 provides an overview of the layered approach that include an environmental scan, strategic monitoring and evaluation and operational progress reporting.

Figure 1: Framework for Greater Christchurch Spatial Plan Monitoring and Reporting



## Greater Christchurch Partnership Reporting Overview

The cycle for partnership reporting is proposed to align with Councils financial year (1 July – 30 June) and align to the quarterly governance meetings throughout the year which are usually held in August, November, March, May.

Regular reporting to the Greater Christchurch Partnership Committee is summarised as a high level in the Table 1:

Table 1: Summary of Greater Christchurch Partnership reporting

Level of reporting	Timeframe (Quarterly reporting commences with each financial year)	Reporting focus
Annual Report	Annually – Q1 (August annually)	<ul style="list-style-type: none"><li>• Environmental Scan – What’s changed in Greater Christchurch?</li><li>• GCSP Headline indicators – How are we tracking? Monitoring trends and indicators</li><li>• Financial Summary</li></ul>
Implementation Plan	Six monthly – Q1 (August) /Q3 (March)	<ul style="list-style-type: none"><li>• Implementation Plan reviewed and updated (annually Q1)</li><li>• Implementation Plan progress reporting (Q3)</li></ul>
Priority Areas programme	Six monthly –Q1 (August) /Q3 (March)	<ul style="list-style-type: none"><li>• Priority Area Tracker for reporting progress on the Priority Areas (PAs) programme.</li></ul>

## Greater Christchurch Spatial Plan review requirements

The partnership must undertake monitoring as required by the National Policy Statement on Urban Development which will inform future development capacity assessments. The Spatial Plan will be reviewed every five years, incorporating the latest release of census information from Stats NZ. This will ensure that future iterations of the plan can respond to changing demographic, social, economic and cultural factors. In accordance with the National Policy Statement Urban-Development 2020, the Future Development Strategy component of the plan will be reviewed every three years following the preparation of the latest Housing and Business Development Capacity Assessment.

The joint work programme should be reviewed and updated at least every three years to coincide with council’s long term planning processes to ensure the partnership prioritises and adequately resources the delivery of the Spatial Plan (and its future iterations).

## Data sets and sources

The approach to identifying data to inform this report has been to utilise existing data sources, focus on fewer, meaningful key indicators, and streamline reporting. Where available information showing trends over the past 10 years has been provided. The Spatial Plan is focused on the Greater Christchurch urban extent which includes parts of three territorial authorities: Christchurch City, Selwyn District and Waimakariri District.

Data is reported for the entirety of the three Greater Christchurch territorial authorities unless otherwise specified. This will be outlined further within relevant sections of the annual report.

### Residential Development and Housing Dashboard

The National Policy Statement on Urban Development further requires that Councils monitor housing and business capacity on a quarterly basis and report annually. A GCP Urban Residential Development Dashboard has been developed to support the legislative requirements of the Greater Christchurch Spatial Plan and should be available on the GCP website later this year. It is anticipated that this will provide reporting to support the legislative requirements.

This dashboard provides an overview of the key indicators for residential development in the Greater Christchurch Partnership area and includes:

- Total new housing since 2013
- Proportions of intensification versus greenfield development
- Size of dwellings (using number of bedrooms)
- Change in feasible capacity
- Mortgage and rental affordability
- Demand for public housing
- Supply for public housing

As this information will be publicly available on the GCP website, it will not be included in this annual report.

# Greater Christchurch Spatial Plan Monitoring and Reporting Plan – Current 2024/25 Work Programme

Overarching directions Opportunities

What success looks like

Headline indicators

2024/25 Work Programme

GCP Reporting  
(July-June Financial Years)

Enable the prosperous development of kāinga nohoanga on Māori Land and within urban areas

Focus growth through targeted intensification in urban and town centres and along public transport corridors



1: Protect, restore and enhance historic heritage and sites and areas of significance to Māori, and provide for people's physical and spiritual connection to these places

Areas of importance to Māori and non-Māori are protected

- Monitor wahi tapu, wahi taonga, nga wai
- Number of Protected Historic Heritage sites



2: Reduce and manage risks so that people and communities are resilient to the impact of natural hazards and climate change

Building is occurring in appropriate areas with relevant mitigations  
We understand and are preparing for the ongoing impacts of climate change

- Building consents for residential new builds issued in across Greater Christchurch
- Percentage of the population that understands the natural hazard and climate change risks they live with



3: Protect, restore and enhance the natural environment, with particular focus on te ao Māori, the enhancement of biodiversity, the connectivity between natural areas and accessibility for people

Quality of surface water improves, protecting ecosystem health and providing for contact recreation, food gathering, mahinga kai and cultural values. Our urban forest thrives with healthy, diverse and resilient trees

- Safe Swimming Sites
- Freshwater quality
- Land Cover



4: Enable diverse, quality and affordable housing in locations that support thriving neighbourhoods that provide for people's day-to-day needs

Housing is being delivered across the continuum from emergency and social through to affordable rentals, progressive home ownership and on to the full market offering.

- Emergency, public, transitional housing
- Housing affordability
- Housing typologies
- Ratio of average house value to average annual earnings
- The Kāinga Nohoanga Strategy is completed.
- Progress is made towards Ngāi Tahu establishing regulatory and fiscal authority and practices that align with tikanga

Joint Housing Action Plan  
Kāinga Nohoanga Strategy  
Priority Areas



5: Provide space for businesses and the economy to prosper in a low carbon future

The economy expands alongside the growth of the population in appropriate physical areas and industry sectors

- Building consents non-residential
- Gross domestic product growth
- Industry greenhouse gas emission intensity

Monitor and assess economic development opportunities  
Priority Areas



6: Prioritise sustainable and accessible transport choices to move people and goods in a way that significantly reduces greenhouse gas emissions and enables access to social, cultural and economic opportunities

People can easily move between home, work, school and amenities without relying on a private car, leading to reduced traffic congestion and lower emissions

- Road transport emissions in Canterbury - vehicle type
- Public transport patronage in Greater Christchurch
- Active travel (walk and cycle) mode share in Canterbury

Greater Christchurch Transport Plan  
Public Transport Improvement Programme – PT Futures & Mass Rapid Transit project development  
Priority Areas

**Annual Report**  
**Annually – Q1**  
Environmental Scan  
GCSP Headline indicators

**Implementation Plan**  
**Six monthly – Q1/Q3**  
Implementation plan review and update (Q1) and progress reporting (Q3).

**Priority Areas Programme**  
**Six monthly – Q1/Q3**  
Priority Areas (PAs)  
Tracker for reporting progress on the PAs programme.

**Other stakeholder reporting**  
**Quarterly – Q1/Q2/Q3/Q4**  
Stakeholder newsletter  
Online dashboard reporting

**Operational reporting**  
**Monthly project reporting to the Senior Officials Group**

# Executive Summary

## *What's changed in Greater Christchurch?*

- The economy performed well in 2024 over the previous year.
- Previous 10-year trends show most economic indicators remain positive and are on par with the rest of New Zealand.
- Population growth is strong.
- Growth is contributing to housing pressure - Housing prices are increasing faster than other parts of New Zealand.
- Households have lower average incomes than the New Zealand average - This gap in household incomes is likely to grow further if the trend over last 5 year continues. Housing affordability continues to worsen for both homeowners and renters - As a measure of housing affordability, there is considerable housing stress across Greater Christchurch. Consistent with the above average rises in house prices and declining affordability, there is an increase in rents as more people cannot afford to buy a home. This has the potential to feed greater rental stress across households into the future.

## *What has been achieved?*

During 2024 the Greater Christchurch Partnership achieved the following key milestones:

- ✓ The Greater Christchurch Spatial Plan was unanimously endorsed by the Greater Christchurch Partnership Committee (GCPC) and adopted and all partner Councils
- ✓ The Mass Rapid Transit Indicative Business Case. Handover of the project to Christchurch City Council completed.
- ✓ The Joint Housing Action Plan was endorsed by the GCPC and adopted and all partner Councils, Phase one investigations completed and presented to the committee.
- ✓ The Greater Christchurch Transport Plan developed.
- ✓ PT Future continuous programme funding through Waka Kotahi's National Land Transport Programme e.g. route 7 (1 out of only four in NZ)

***The 2024 Infometrics Greater Christchurch Regional Economic Profile (Attachment B) has been used to form the basis for our environmental scan. The report summarises the current key metrics for the Greater Christchurch area, which includes the council geographical boundary outside of the Greater Christchurch Urban extent.***

***The profile provides a summary of key metrics in March 2024 when the GCSP was adopted by Councils so provides an appropriate baseline.***



## Relevant highlights from the Infometrics Regional Economic Profile

- The Greater Christchurch economy was more diverse than the New Zealand average.
- Economic growth averaged 3.1% per annum over the 10 years to 2024 compared with an average of 3.0% in New Zealand. Similarly, employment was up 3.2% from a year earlier. Over 10 years employment growth has averaged 2.2%, on par with the rest of New Zealand.
- The total population for Greater Christchurch was 570,300 in 2024, up 1.6% from a year earlier. Population growth averaged 1.9% over the 5 years to 2024 compared with 1.4% in New Zealand.
- In the following wellbeing domains, Greater Christchurch outperformed New Zealand in the following domains: *civic engagement and governance, environment, housing, jobs and earnings, knowledge and skills, safety and social connections*.
- It underperformed New Zealand in the following wellbeing domains: *health and income and consumption*.
- Looking at average household income, the average was \$117,506 in 2024, significantly lower than the New Zealand average of \$132,873, with annual average increases over the past 5 years being 3.3% in Greater Christchurch and 4.6% across New Zealand.
- Per capita income is a widely used measure of living standard as it accounts for all sources of household income as well as household size. Per capita income growth was 6.8% for the year to March 2024 compared to growth of 5.9% in New Zealand.
- House value growth increased by 4.7% for the year to March 2024 compared to growth of 2.6% in New Zealand.
- 45.8% of the average household income would be needed to service a 20-year mortgage on the average house value, with a 20% deposit at average 2-year fixed interest rates in 2024.
- Growth in average weekly rent was 9.5% for the year March 2024. Growth was greater than in New Zealand at 6.9%.
- The average weekly rent accounted for 22.4% of the average household income in 2024. Rent was less affordable than in New Zealand at 21.9%.

## What does this mean for the Greater Christchurch Spatial Plan?

***Focus growth through targeted intensification in urban and town centres and along public transport corridors***

***Enable the prosperous development of kāinga nohoanga on Māori Land and within urban areas***

The overarching directions above are the key, long term outcomes sought by the Greater Christchurch Spatial Plan over the next 30 years. As it has only been a year since the plan was adopted, it is too soon to tell if the external environment or actions taken by the partnership have had a measurable impact.

Government policy to increase land supply in effect enables development in most areas of Greater Christchurch. This is potentially helpful for increasing overall housing supply however could reduce the demand for intensification as envisaged by the plan. Planning tools are increasingly limited in their ability to influence the outcomes sought in the plan. The partnership will need to look for opportunities to invest, lead, co-ordinate and to influence others to achieve change.

It is difficult to anticipate the likely impact of the Coalition Government's fast-track approvals projects on the implementation of the Spatial Plan. Should all such proposals be approved, the scale of housing and commercial development proposed has the potential to compromise the urban form and transport outcomes in the Spatial Plan, and result in additional infrastructure and servicing costs to local authorities.

The importance of progressing the investment in the journey to Mass Rapid Transit (MRT) as a 'city shaping' initiative is fundamental to achieving many of the outcomes of the Spatial Plan. It is hoped that MRT will be included in the next Waka Kotahi NZ Transport Agency National Land Transport Programme 2027-30. Partners collective commitment to progressing public transport investment will be critical to unlocking the future of MRT.

The trends over the past 12 months have been mostly consistent with assumptions used when developing the plan. Therefore, the plan remains relevant and fit for purpose. Of concern over this period however is worsening housing affordability per capita. The indicators provide further evidence to support the Partnerships continued focus on progressing the Joint Housing Action Plan.

# Greater Christchurch Spatial Plan – How are we tracking?

**Opportunity One - Protect, restore and enhance historic heritage and sites and areas of significance to Māori, and provide for people’s physical and spiritual connection to these places.**

Outcome sought: Areas of importance to Māori and non-Māori are protected.

### What are the indicators telling us?

Mana whenua is best placed to lead the approach to measuring the protection, restoration and enhancement of sites and areas of significance to Māori with support from the Greater Christchurch Partnership. This could potentially involve:

- Baseline state,
- What has been done, and how has this worked,
- Are there new or ongoing issues/risks,
- Has the state changed and
- are the mechanisms in place to achieve this working?

Heritage Zealand have recently undertaken a triennium survey of Councils and have agreed to work with us to provide a stronger narrative and assessment for the next annual report.

### External factors

- Climate change is impacting on our cultural heritage with changes in the environment.
- Development pressures, including urban growth and the need for housing, can put pressure on heritage areas.
- Demolition by neglect, where heritage buildings are allowed to deteriorate and no regulatory controls are available to enforce or incentivise a standard of maintenance and care.
- The insurance industry is facing increasing risks due to climate change, potentially leading to higher premiums or difficulties obtaining insurance for heritage properties, especially those in coastal areas.
- The RM reforms emphasises private property rights and a shift towards a more permissive approach to development. This change could impact heritage designations, as the new legislation aims to simplify processes and enable development, potentially leading to fewer restrictions on heritage properties.

### Future considerations

How can we support mana whenua to protect sites of significance to Maori and track progress?

What different incentives for the conservation of Heritage Places could the partnership consider that they don’t already have in place?

What successful examples of education and initiatives have been used to encourage heritage retention, preservation and re-use in Aotearoa New Zealand that could be considered in Greater Christchurch?

### Monitor Wahi Tapu, Wahi Taonga, Nga Wai

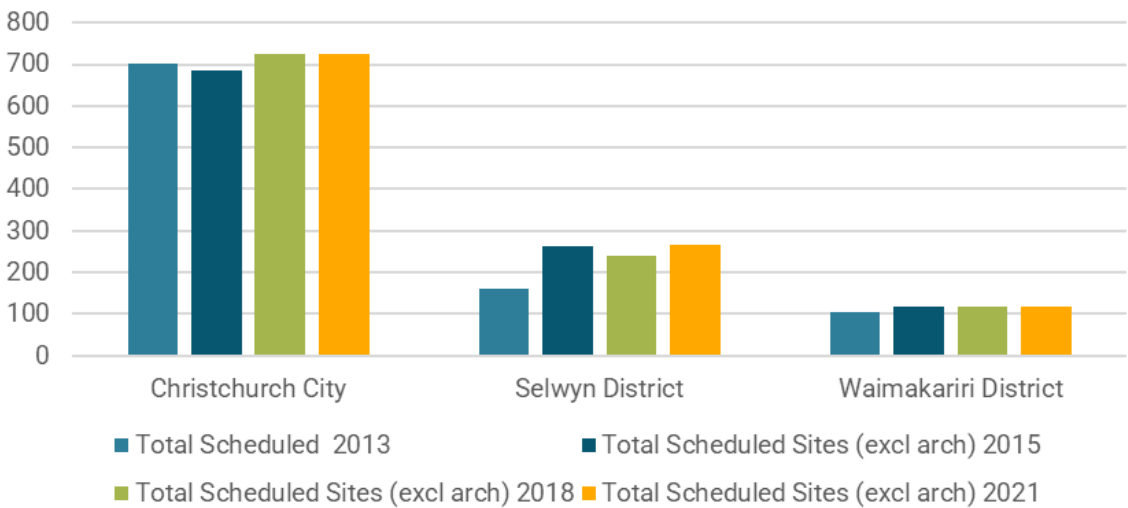
*Why is this important?* The Greater Christchurch area encompasses a number of sites and areas of significance to Māori. This includes those recognised as Wāhi Tapu, Wāhi Taonga, Ngā Tūranga Tūpuna and Ngā Wai. The protection of sites and areas of significance to Māori for the benefit of current and future generations is essential to the cultural identity of Greater Christchurch, acknowledging that their protection is a matter for engagement with mana whenua.

### Number of Protected Historic Heritage sites

*Why is this important?* New Zealand’s historic heritage encompasses a diversity of significant places – historic buildings and structures, archaeological sites, historic sites, coastal sites, historic areas and Māori heritage. The protection of historic heritage from inappropriate subdivision, use and development is a matter of cultural importance. Protecting our historic heritage is important for our identity and for our economic, social, and cultural wellbeing as well as future generations. Protecting our historic heritage can be challenging and may require active stewardship often in the face of limited resources.

Monitor Wahi Tapu, Wahi Taonga, Nga Wai  
Still in development and will be reported in the 2026 Annual Report.

Heritage Sites Listed in District Plan Schedules  
2013-2021 (excluding archeological sites)



## Opportunity Two - Reduce and manage risks so that people and communities are resilient to the impact of natural hazards and climate change

Outcomes sought: To ensure that growth occurs in the right places, it is important to identify and map areas that require protection, and areas which need to be avoided or mitigated. Urban development is directed away from areas that are at significant risk vulnerable to hazards and climate change and where that risk cannot be reduced to acceptable levels. Our communities understand and are preparing for the ongoing impacts of climate change.

### What are the indicators telling us?

These indicators are still being developed with partner staff.

Partner staff have a workable solution for the mapping development in areas vulnerable to high hazards.

The Canterbury Civil Defence Emergency Management have developed a new annual community survey that asks the community about their understanding of natural hazards and climate risk. Data will be available to us at a Greater Christchurch. This survey was conducted in March 2025.

Both of these data sets were not available by the time of finalising this report and will be reported in the 2026 Annual Report.

### External factors

- Increased extreme weather events, and a higher frequency of natural disasters like floods, wildfires, and droughts may pose risks to biodiversity and the reliability of water supplies.
- Break down in social cohesion may impact on neighbourhood and communities preparedness, response and recovery.
- The insurance industries response to future insurance of natural hazards. The nature and extent of any Government response to that will be an important factor in how much impact it has on the general population and investment in at-risk property.

### Future considerations

How can we align with and support the Canterbury Climate Partnership Plan (CCPP) in the short term?

How should we consider natural hazard risk, particularly in the Priority Areas?

How can we encourage or incentivise development in appropriate areas that are not subject to natural hazards?

### Overall consents issued in areas noted as high hazard in Greater Christchurch

*Why is this important?* It is essential that urban development is directed away from areas that are at significant risk from natural hazards where that risk cannot be reduced to acceptable levels, to ensure the safety and wellbeing of people, and the protection of buildings, infrastructure and assets. By understanding and preparing for climate change impacts, communities can create safer, more resilient, and sustainable environments for people and ecosystems. In the spatial plan areas to avoid or mitigate are areas vulnerable to a high risk of flooding, vulnerable to a medium or high risk of coastal inundation, coastal erosion and tsunami inundation or areas at risk from rockfall, cliff collapse, mass movement and fault lines.

**Overall consents issued (code of compliance completion) in areas noted as high hazard in Map 7 in the Greater Christchurch Spatial plan.**

*Still in development and will be reported in the 2026 Annual Report.*

### Percentage of the Greater Christchurch population that understands the natural hazard and climate change risks they live with

*Why is this important?* Knowing how many people understand these risks helps authorities and emergency services assess the region's readiness for events like earthquakes, floods, and rising sea levels. The more people understand the risks, the more they can prepare their homes, businesses, and infrastructure to withstand hazards, reducing potential damage and loss. When people are aware of the risks, they are more likely to take proactive measures, like securing homes against earthquakes or preparing emergency kits.

**Percentage of the Greater Christchurch population that understands the natural hazard and climate change risks they live with.**

*Still in development and will be reported in the 2026 Annual Report.*

Opportunity Three - *Protect, restore and enhance the natural environment, with particular focus on te ao Māori, the enhancement of biodiversity, the connectivity between natural areas and accessibility for people*

Outcome sought: Quality of surface water improves, protecting ecosystem health and providing for contact recreation, food gathering, mahinga kai and cultural values. Our urban forest thrives with healthy, diverse and resilient trees

What are the indicators telling us?

Data on safe swimming sites in Greater Christchurch shows a generally stable trend over the past several years, with the proportion of monitored sites rated as safe remaining relatively consistent and largely aligned with national patterns. While the data suggests some year-to-year variation, the overall trend indicates that the safety of monitored swimming sites has not significantly declined over the reporting period.

Freshwater quality trends show a mixed picture across monitored sites. A number of sites appear to be improving, which is an encouraging sign. At the same time, there are still sites showing signs of degradation, which remains a concern and will require continued focus. A proportion of sites have trends that are indeterminate, indicating a need for improved long-term data to better understand the state of freshwater environments and support effective management.

Land cover in Greater Christchurch has changed notably over the past two decades, with an increase in the built environment reflecting population growth and development. Changes in land cover provide a useful context for understanding land use patterns and highlights the importance of managing future growth in a way that protects highly productive land and supports environmental outcomes.

External factors

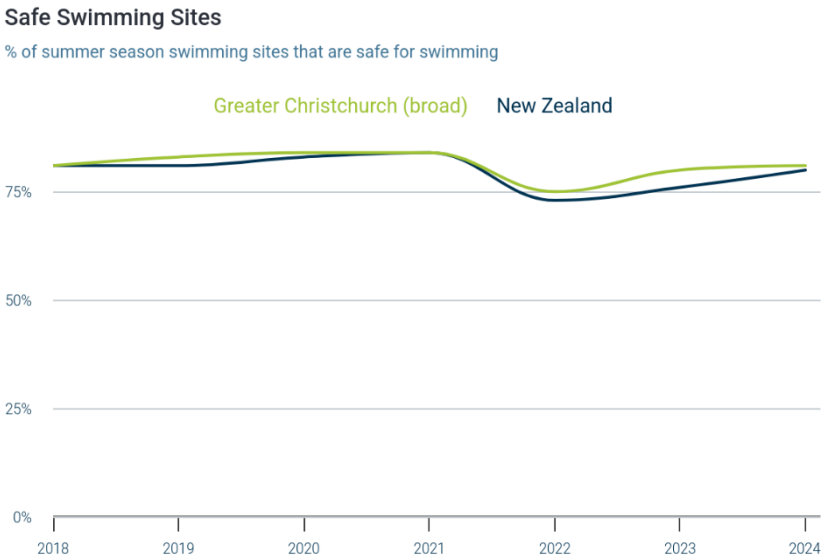
- Changes to national direction instruments and wider resource management reform may constrain available options.
- Climate change and weather patterns such as El Niño affect the health of waterbodies.
- Population growth influences changes in land use cover and places pressure on the natural environment.

Future considerations

- What impact is the Government’s legislative and policy reform programmes anticipated to have on vegetation cover, highly productive land and non-permeable land cover?
- What insights can we draw from the delivery of the Canterbury Climate Partnership Plan to inform our future GCSP actions e.g. Blue-Green Strategy in the medium-term?
- How can private development contribute to enhanced biodiversity and environmental performance with a focus on te ao Māori?
- What innovative mechanism/ incentives are there to preserve highly productive land for future generation, in the context of development enablement?

Safe Swimming Sites

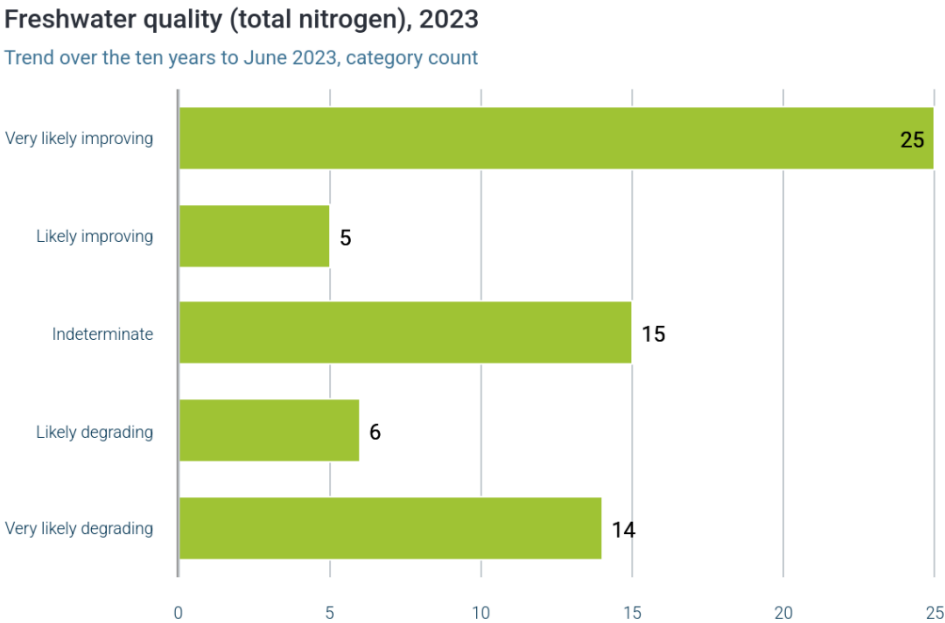
*Why is this important?* Monitoring safe swimming sites is crucial to protect public health by identifying and mitigating risks from waterborne illnesses, such as those caused by faecal contamination or toxic algae and ensuring safe recreational activities.



Source: Infometrics

Freshwater quality

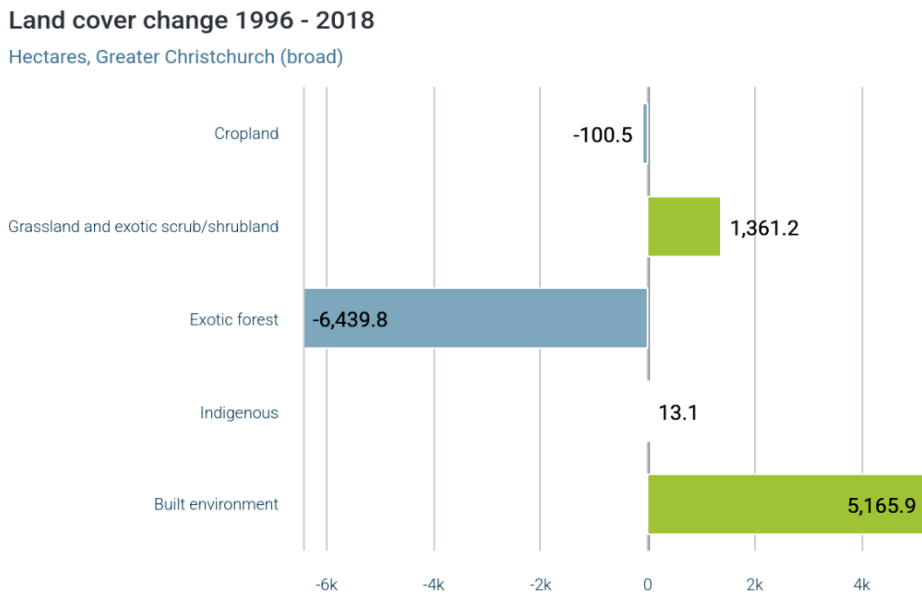
*Why is this important?* Monitoring freshwater quality is crucial for protecting human health, maintaining healthy ecosystems, and ensuring the sustainable use of water resources for drinking, agriculture, recreation, and industry. Monitoring the health of freshwater is important to evaluate long-term trends in ecosystem health and identify freshwater quality issues early.



Source: Infometrics

Land cover

*Why is this important?* Land cover describes the types of vegetation and built or natural features that cover the land’s surface. Land cover can be natural in origin (e.g. a remote indigenous forest or a lake), artificial – occurring as a direct result of human activities (e.g. a built-up area or roads), or somewhere in between (e.g. exotic grassland or exotic forest). Understanding changes in land cover is important because the type and location of vegetation cover can influence land stability and the movement of water through the landscape.



Source: Infometrics showing change between 1996 and 2018



## Opportunity Four - Enable diverse, quality and affordable housing in locations that support thriving neighbourhoods that provide for people's day-to-day needs.

Outcome sought: Housing is being delivered across the spectrum from emergency and social through to affordable rentals, progressive home ownership and on to the full market offering.

### What are the indicators telling us?

There are a large number of detailed housing indicators included within the GCP Residential Development and Housing Dashboard.

Delivering enough affordable housing continues to be a significant challenge. Mortgage affordability has declined by -27% since 2013. Although rental affordability has increased by between 14% and 21% depending on the TA over the same period.

The total new housing supply across Greater Christchurch has increased by 48,900 dwellings since 2013. This indicates GCP are on track to meet our projected growth targets for 2032.

Demand for public housing has declined by 516 people since 2022, while the transfer register (people needing different public housing) is at the same level as 2022.

### External factors

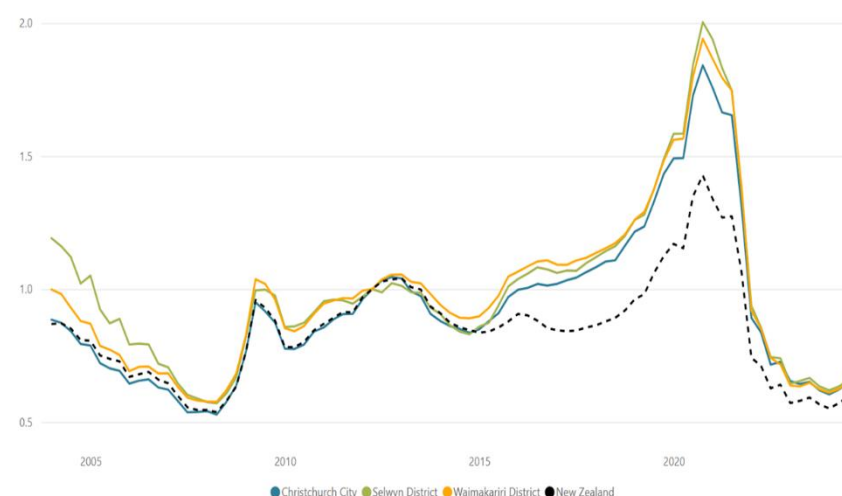
- Housing is complex with many contributing factors, many of which lie outside the remit of local government and will require working with our central government partners and community housing providers to influence and advocate for change.
- Interest rate cuts, aiming to stimulate borrowing and investment. While reductions can make mortgages more affordable, the overall impact on the housing market depends on broader economic conditions and buyer confidence. High interest rates, cost-of-living crisis and recessionary pressures and job uncertainty, have led to a noticeable cooling in buyer interest.
- The Government's Going for Housing Growth programme (GfHG) Pillar 1 changes could be implemented through the new resource management system will commence in mid-2025. Further work is currently underway on detailed design of Pillar 2 improvements to infrastructure funding and financing tools. The legislation to implement these changes expected to be introduced in September 2025 and enacted in mid-2026.
- Over 7,000 of the nearly 8,400 additional homes indicatively provided for across the listed of the fast-track projects in Greater Christchurch, would be developed in greenfield locations outside the future growth areas in the Spatial Plan. The scale of development proposed has the potential to undermine the urban form and transport outcomes in the Spatial Plan, and result in additional infrastructure and servicing costs to local authorities.

### Future considerations

- Development of a targeted implementation plan to support the development of kāinga nohoanga on Māori Land and within urban areas will be progressed once the Kāinga Nohoanga strategy is completed.
- How can mana whenua be supported in accessing finance and navigating the system to deliver housing on Māori owned land across Greater Christchurch?
- How will the Community Housing sector be supercharged by the Government to provide greater numbers of social and affording homes?
- What influence will the Government's three stage RMA reform programme have on the deliverability of the GCSP?
- What does a consistent, sustainable and ongoing funding mechanism for social and affordable housing look like for Greater Christchurch?
- How can affordable housing – assisted rentals and assisted ownership – be best delivered in Priority Areas, aligned to the GCSP?
- How do we grow demand for apartment style living in Greater Christchurch, and what are the qualities it needs to offer to overcome possible trade-offs?
- What incentives need to be implemented to realise medium to high density developments – residential with a range of bedrooms, commercial, mixed use – in well serviced location in Greater Christchurch?

### Home Ownership Affordability Index by TA and NZ

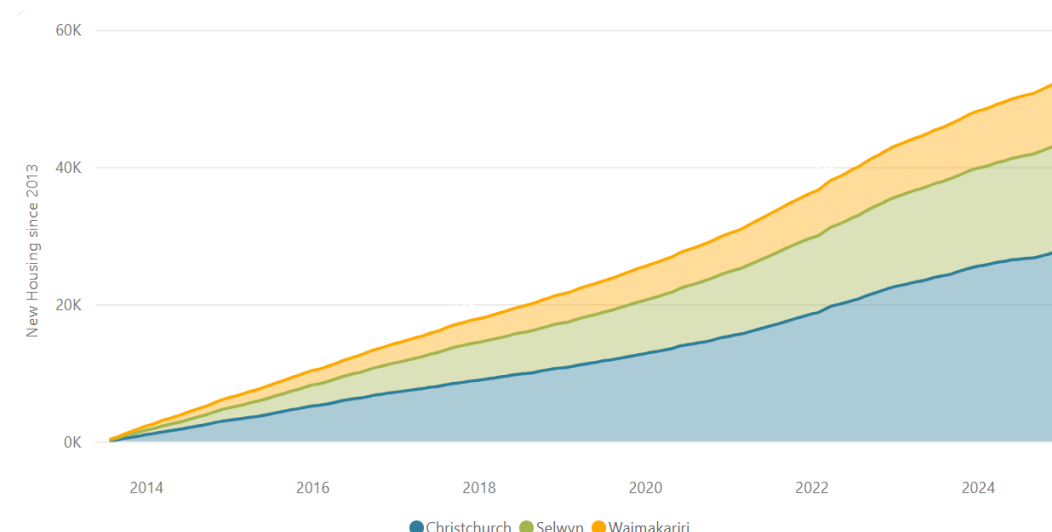
*Why is this important?* The change in mortgage serviceability indicator compares changes in the purchasing power of mortgage interest payments for home loans with the growth in median household disposable (after tax) income. Housing Affordability Indicators show how affordability of renting a home, saving for a deposit, and servicing a mortgage for people entering the market has changed over time.



Source: HUD Urban Development Dashboard – Sept 2024

### Cumulative new housing supply consented (issued) since 2013

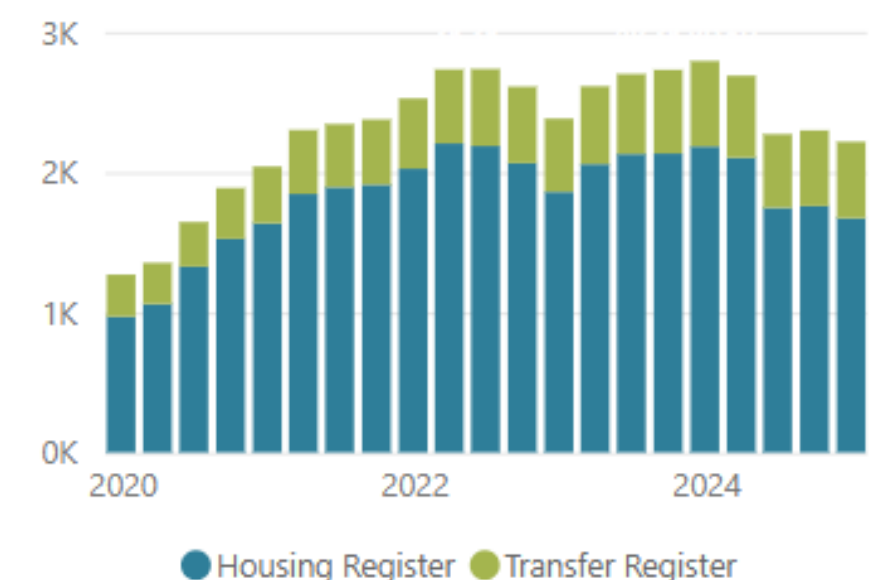
*Why is this important?* Monitoring housing supply is important for understanding and addressing housing affordability and accessibility. It helps decision makers make informed decisions about planning, development, and resource allocation. Tracking housing supply also ensures that enough different typologies are available to meet a range of housing needs, particularly in high-growth areas such as Greater Christchurch.



Source: CCC, SDC, WDC building consent records January 2025

### Demand for Public Housing in Christchurch, Selwyn and Waimakariri

*Why is this important?* It helps show how many people need warm, safe, and sustainable housing, and the movement of people through the public housing system.



Source: HUD Urban Development Dashboard – Sept 2024

## Opportunity Five - Provide space for businesses and the economy to prosper in a low carbon future

Outcome sought: The economy expands alongside the growth of the population in appropriate physical areas and industry sectors

### What are the indicators telling us?

In 2023, the intensity of industry greenhouse gas emissions in Christchurch City was lower than in New Zealand (181), Waimakariri District (272) and Selwyn District (571). Largely due to the agriculture, forestry and fishing industries.

GDP in Greater Christchurch measured \$42,366.5m in the year to March 2024, up 1.6% from a year earlier. Growth was greater than in New Zealand (1.4%).

GDP per capita in Greater Christchurch was \$74,288 in 2024, which was lower than the New Zealand average of \$78,453. GDP per capita change in Greater Christchurch was 0.0% for the year to March 2024. Growth was negative in New Zealand (-0.4%).

Non-residential building consents to the value of \$1,404.1 million were issued in Greater Christchurch during the year to December 2024. This compares with the ten year annual average of \$1,273.3 million. The value of consents in Greater Christchurch increased by 11.3% over the year to December 2024, compared to a year earlier. In comparison, the value of consents decreased by 0.9% in New Zealand over the same period.

### External factors

International trade and policy changes such as proposed tariffs from major trading partners could lead to increased inflation volatility and affect export demand.

Elevated inflation and interest rates are affecting consumer confidence and demand. These economic conditions influence household spending and business investment decisions within Greater Christchurch.

Climate change and changes in temperature and precipitation patterns can affect crop yields and livestock poses risks to various sectors, particularly agriculture.

Christchurch Airport saw a 26% increase in international arrivals over the year to September, bringing visitation numbers to 75% of pre-COVID levels.

### Future considerations

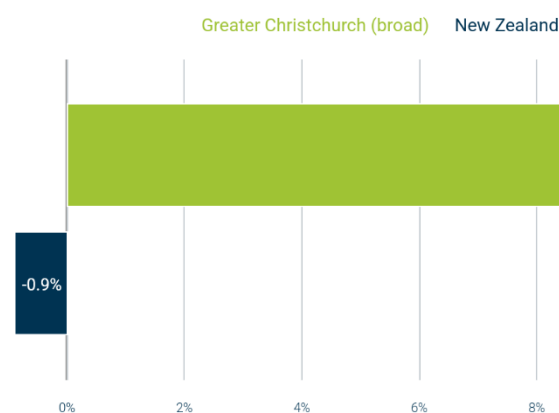
- How do we ensure the business community is involved in the development of Priority Areas to support appropriate development opportunities?
- What types of businesses and industrial sectors do we wish to see grow in Greater Christchurch?
- How do we generate agglomeration benefits for the Greater Christchurch economy in coordinated working across our regions key employment centres (Grow the pie not compete for the same slice)?
- What incentives could be pursued in order to retain, attract and grow the businesses and sectors we want to see based in Greater Christchurch?

### Building consent (non-residential)

*Why is this important?* Monitoring non-residential building consents can provide valuable insights into the overall economic health. A rise in non-residential consents, can suggests confidence in economic growth and investment. A decline in consents may indicate a declining economic environment.

Growth in value of consents

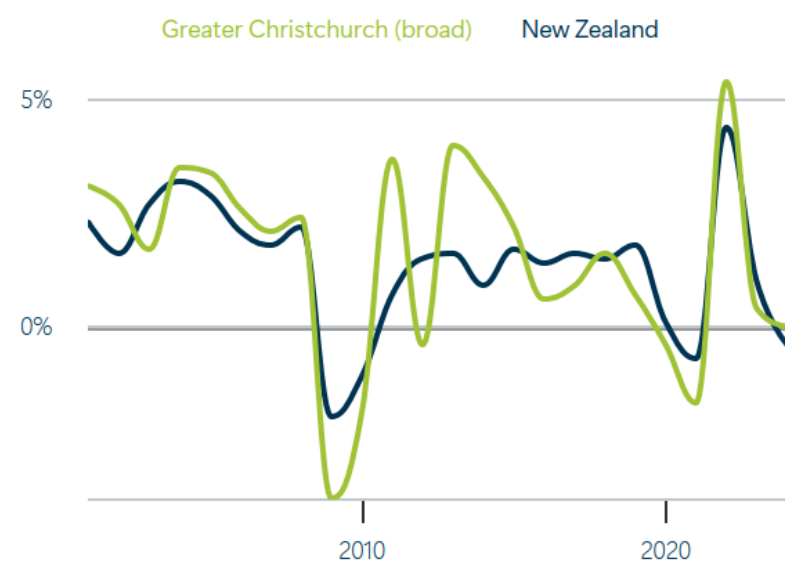
Annual average % change December 2023 - December 2024



### Gross domestic product growth

*Why is this important?* GDP is important because it gives information about the size of the economy and how an economy is performing. The growth rate of real GDP is often used as an indicator of the general health of the economy. In broad terms, an increase in real GDP is interpreted as a sign that the economy is doing well.

#### Annual % change, March years



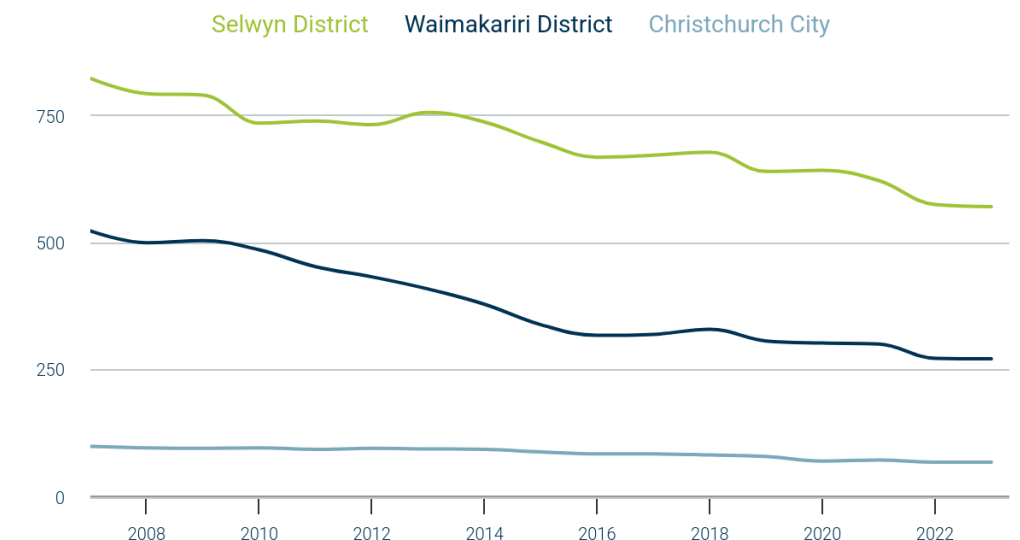
Source: Infometrics Quarterly Economic Monitor

Source: Infometrics Regional Economic profile

### Industry greenhouse gas emission intensity

*Why is this important?* Measuring industry greenhouse gas emission intensity is important because it allows for a standardised comparison of how much greenhouse gas emissions are produced per unit of economic activity within different industries. This enables policymakers and businesses to identify sectors with the highest emissions and prioritize efforts to reduce them, ultimately contributing to achieving climate change goals and supporting a move towards a lower carbon economy.

Tonnes CO<sub>2</sub>-e per \$1m GDP, December years



Source: Infometrics Regional Economic profile

## Opportunity Six - Prioritise sustainable and accessible transport choices to move people and goods in a way that significantly reduces greenhouse gas emissions and enables access to social, cultural and economic opportunities

Outcome sought: People can easily move between home, work, school and amenities without relying on a private car, leading to reduced traffic congestion and lower emissions

### What are the indicators telling us?

Greenhouse gas emissions from road transport in Canterbury are regularly monitored to track progress toward achieving a 30 percent reduction in land transport greenhouse gas (GHG) emissions by 2030. Total road transport emissions dipped during the Covid 19 pandemic and since then have remained relatively stable. Despite population growth, emissions from light vehicles haven't increased significantly. Overall road transport emissions have generally been increasing but decreased in 2019 and 2020. The changing profile of the vehicle fleet in Greater Christchurch and increased vehicle fuel efficiency is likely to have been a contributing factor.

Metro's Greater Christchurch network has superseded a former post-earthquake patronage record – with nearly 14.5 million passenger trips taken in the 2023-24 financial year. That's 2.8 per cent above the previous post-earthquake record of almost 14.1 million passenger trips in the 2013-14 financial year.

### External factors

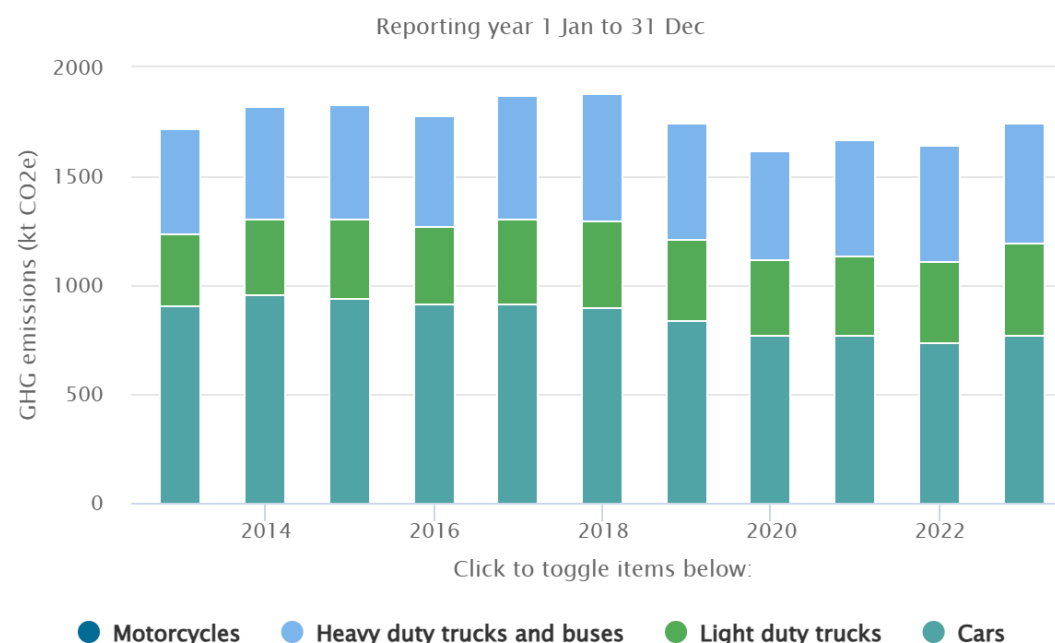
- Population growth continues to increase demand for travel and freight movement, placing additional pressure on the transport system and emissions reduction efforts.
- Fluctuating fuel prices, inflation, and interest rates influence household and business transport decisions, potentially delaying uptake of low-emission transport options.
- Shifts in central government priorities, including a stronger focus on Roads of National and Regional Significance, may limit investment in public and active transport infrastructure.

### Future considerations

- The importance of progressing the investment in the journey to Mass Rapid Transit (MRT) as a 'city shaping' initiative is fundamental to achieving many of the outcomes of the Spatial Plan. Hopefully the next Government Position Statement – Land Transport, supports MRT. Partners' collective commitment to progressing public transport investment will be critical to unlocking the future of MRT.
- The community continues to seek and advocate for improved public transport across Greater Christchurch.
- How is Greater Christchurch best positioned to influence funding allocations in the next NLTP?
- How will long-term funding be secured to deliver the Greater Christchurch shaping public transport initiatives?
- What new funding and financing mechanisms will the Government make available to Partners to fund the regionally significant infrastructure required to service the growing population?

### Road transport emissions in Canterbury - vehicle type.

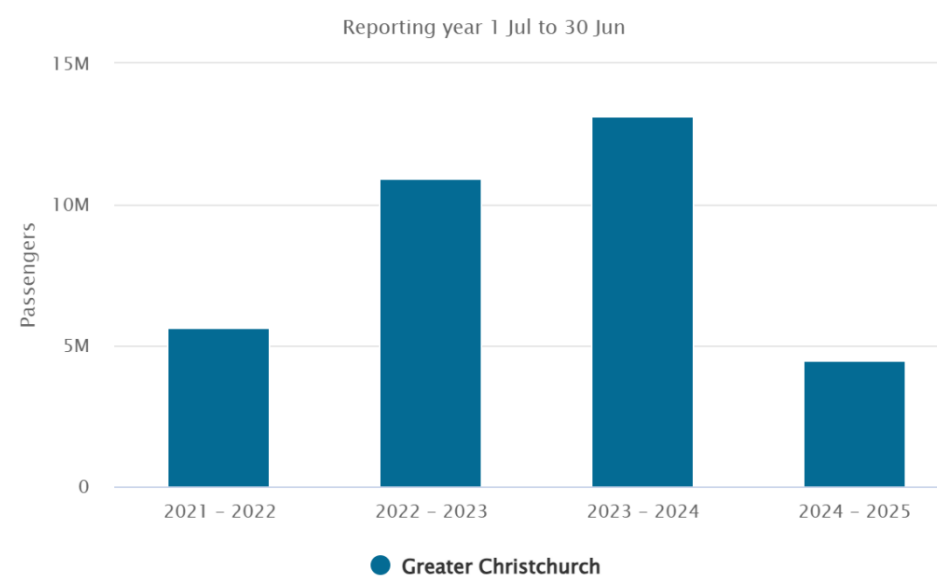
*Why is this important?* Monitoring road transport emissions in Canterbury is important because it enables us to track progress towards reducing greenhouse gas emissions, which is crucial for addressing climate change, and improving air quality in the region, especially considering that road transport is a major contributor to emissions in New Zealand. It can help to identify emission hotspots and implement targeted strategies to reduce emissions and build a more sustainable transport system.



Source: Environment Canterbury

### Public transport patronage in Greater Christchurch

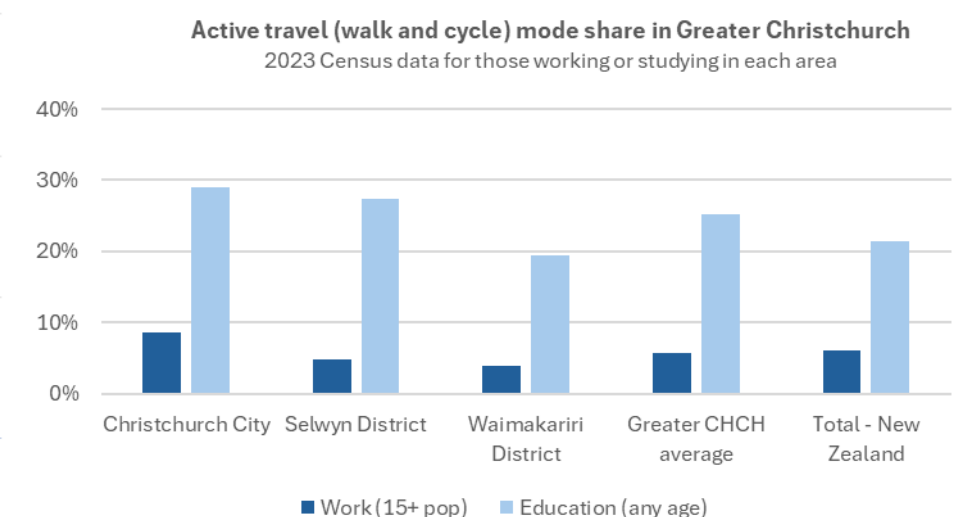
*Why is this important?* Monitoring patronage helps to understand how well public transport is meeting the needs of the community. It also helps to identify when more or different public transport is needed to reduce traffic congestion and provide more travel choice. The increase in public transport patronage is considered a key foundation to realising the future MRT system.



Source: Environment Canterbury

### Active travel (walk and cycle) mode share in Canterbury

*Why is this important?* A key component of the focus on targeted intensification is the creation of an urban form that supports and encourages as many trips as possible being made by active travel – walking, cycling and other modes of micro mobility (such as scooters). By monitoring active travel, we can see how effective our actions are being.



Source: Environment Canterbury



## Strategic Risk Management

There is risk and uncertainty inherent in any long-term strategy. The Strategic Risks and Managing Uncertainty section of the Implementation Plan details each of the ten identified strategic risks and the Partnership's actions to mitigate each of these.

Monitoring and review are important to ensure that implementation of the GCSP as a long-term development strategy adapts to new and emerging influences and changes that occur over time. Of the ten strategic risks, those of highest importance for partners to mitigate are outlined below, along with the Partnership's approach to mitigating these risks:

- Funding availability and Finance (Critical risk level): GCP Partners are working closely to identify alternative funding sources to enable implementation, pursue use of new funding mechanisms enabled by the Government and seek to optimise timing of project development to maximise alignment to Government policy and funding cycles.
- Priorities and Alignment (High risk level): The GCP leadership model is intended to manage this risk by providing a mechanism for regular review and alignment discussions. The Partnership Review to be completed in mid-2025 will seek to identify areas for improvement and enhancing the Partnerships performance. A future Regional Deal may assist with achieving even stronger alignment across Partner organisations.
- Changes in Government policy (High risk level): This is being actively tracked by the Partnership through the Operating Environment Statement, with those of significance escalated to the GCP Committee for coordinated response.
- Achievability of intensification (High risk level): Greater Christchurch Partnership will continue to monitor this evolving situation and consider any actions required to achieve the desired settlement pattern.
- Infrastructure Cost and Delivery (High risk level): Greater Christchurch Partnership will actively monitor this risk and support Partners work on delivery constraints.

## Financial Summary

At year end to 30 June 2024 the operating budget for the secretariat had a modest surplus of \$82K as shown in Table 1.

Table 1 – Secretariat Operating Budget Year End Financial Results

Expense	Approved Budget FY 2023/24	Actuals FY2023/24	Approved Budget FY2024/25	Revised Budget FY2025/26
Operating Costs				
-Staff costs & independent chair	610,000	507,000	610,000	500,000
-Mana whenua Advisory	100,000	100,000	100,000	70,000
-Administration ( <i>printing, catering, adhoc</i> )	10,000	8,000	10,000	10,000
-Advice & Communications	70,000	45,000	70,000	60,000
-CCC Overhead ( <i>accommodation, IT, support</i> )	50,000	65,000	50,000	114,900
Total	840,000	725,000	840,000	754,900
Surplus		115,000		
Less Joint Housing Action Plan funding carry forward		-33,000		
Surplus		82,000		

The secretariat operating budget for the 2024/25 year remained the same as the 2023/24 year at \$840,000.

Project balances as of 30 June 2024 and project budgets for the 2024/25 year are listed in Table 2.

CEAG approved the consolidation of the project leadership balances into a single Programme Delivery budget item. Expenditure from these funds can only be committed with approval from the Senior Officials Group.

Table 2 – Project Funding Balances

Project Balances as at 30/6/24	Programme Delivery	485,956
	Kāinga Nohoanga Strategy	6,522
	Joint Housing Action Plan Development	33,000
Project Budget contribution for 24/25 year	Programme Delivery	150,000
	Engagement & Consultation	80,000

## Outlook for 2025/26 Financial Year

Once project plans for the Phase 2 of the Joint Housing Action Plan and the Priority Areas are drafted alongside other projects i.e. monitoring and reporting, a programme budget will be developed aligned to available funding.

The secretariat operational costs are under budget year to date. The annual Programme Delivery budget of \$150k and Engagement & Consultation budget of \$80K have not to date been invoiced to Councils and won't be unless approved project plans are in place that require this funding to be called upon. The 2025/26 operational budget has been reviewed and further savings of \$85,100 identified through reductions in consultants, salaries and other operational costs which represents a 10% reduction on the approved Long Term Plan budget.