

Greater Christchurch Housing Needs Assessment – Targeted Update

Greater Christchurch Partnership

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1 Introduction

Housing need and affordability are core concerns across most urban areas in New Zealand. While Christchurch remains relatively affordable compared to other major centres, these issues are significant and worsening within the urban area.

The Greater Christchurch Partnership's ('GCP') has undertaken research and developed a Joint Housing Action Plan ('JHAP'). The JHAP provides a framework for identifying where and why market intervention is justified to support the health and wellbeing of individuals and communities across Greater Christchurch¹.

The Partnership is now reaching a point where decisions need to be made on which interventions to pursue as part of implementing the JHAP. To inform this decision-making, the GCP requires an updated assessment of housing need and affordability across Greater Christchurch.

1.1 Scope

The scope of this report is to provide a targeted update on housing need and affordability across Greater Christchurch.² In particular, the GCP requires the report to focus on the findings of the analysis rather than providing a detailed description of the methodology.

1.2 Structure

This report is structured into four sections, as follows:

- ❖ Section 2 briefly discusses key baseline input data and the method adopted.
- ❖ Section 3 outlines the key results for housing need by dwelling tenure and dwelling type, as well as rental stress, and provides an estimate of the housing continuum for Greater Christchurch.
- ❖ Section 4 presents the overall findings of the report.

¹ For the purposes of this report it is the three Territorial Areas of Christchurch City, Selwyn District and Waimakariri District taken as a whole.

² The target assessment in this report does not include modelling outcomes by sub-area (previous study was conducted using 22 sub-areas defined by SA2), family composition (previous study included types of families, age of reference person, or ethnicity of reference person), or utilisation (previous study provided data on crowding and underutilisation of housing stock).

2 Baseline Greater Christchurch

The following section provides a brief summary of the data and methods adopted to estimate current and future housing needs and affordability outcomes. The key datasets used in the modelling include customised Census data³, growth projections for each territorial authority⁴, and economic data. These datasets are combined using a method similar to the 2021 Housing Needs Assessment ('HNA 2021')⁵, which is briefly outlined in this section.

2.1 Census

Briefly, as this is a targeted update, only some of the key outcomes from the Census data are presented in Figure 2-1. The data show that the proportion of renter households across all territorial authorities in the Greater Christchurch area declined between censuses, falling from 33% to 31%. This runs counter to earlier trends observed in Greater Christchurch, which had indicated rising renter shares and declining home-ownership rates, as well as trends in other urban areas across New Zealand where owner-occupation has stabilised or continued to fall and the share of renters has increased. The HNA 2021 had projected that the share of owner-occupied dwellings would decline, and the number of renter households would increase.⁶

Figure 2-1: Summary of Census Households Housing Data 2018 and 2023

Summary Census	Waimakariri District	Christchurch City	Selwyn District	Greater Christchurch
Tenure (Renters)				
2018	20%	36%	20%	33%
2023	18%	35%	20%	31%
Household Type (Single)				
2018	20%	25%	13%	23%
2023	22%	26%	14%	24%
Dwelling Type (Attached)				
2018	7%	19%	4%	16%
2023	9%	26%	5%	21%
Dwelling Size (1 or 2 Bedroom)				
2018	18%	30%	10%	26%
2023	20%	31%	10%	27%

³ Sourced from Statistics New Zealand.

⁴ Sourced from each of the Councils.

⁵ Livingston and Associates (2021) Housing Demand and Need in Greater Christchurch.

⁶ For 2023 the Waimakariri renters was previously projected to be just over 20%, Selwyn renters were projected to be 21%, and Christchurch was projected to be 38%.

Other aspects of the data are broadly consistent with the HNA 2021, albeit with higher rates of change than projected for some variables. In particular:

- ❖ The share of one-person households has increased to 24%, which is consistent with the HNA 2021.
- ❖ The proportion of households living in attached dwellings has increased faster than anticipated. The HNA 2021 suggested only 17% would be attached, whereas the 2023 Census shows this has risen to 21%.
- ❖ The share of dwellings with one to two bedrooms has increased, broadly in line with the HNA 2021 projection of 27% by 2023. This outcome is largely driven by an increase in the number of attached one-and two bedroom dwellings being built.

No forecast or projection will ever be perfect, however the projections in the HNA 2021 proved broadly reasonable over the inter-census period. That said, there has been a positive shift toward owner-occupation and a greater preference for attached dwellings that was not anticipated. Both factors are important, as they will influence not only the scale of housing need but also its nature, which in turn affects the policy settings required to address that need.

Also, recently housing affordability has improved for owner-occupiers and, to a lesser extent, middle-income households who rent. Housing stress for these groups has eased, as average household incomes have increased faster than average rents, while slower house price growth have also contributed to improved affordability for home ownership (see Appendix C).

2.2 Growth Projections

The growth projections applied in this assessment have been sourced from each council.⁷ For the entire Greater Christchurch area the population is projected to increase from 557,700 people in 2023 to 772,400 by 2053, which is a growth rate of 1.1% per annum. This rate of growth is broadly comparable to what occurred over the last 30 year⁸, however with a slightly lower share of growth being accommodated in Waimakariri in the projections.

The projections applied suggest that:

- ❖ Christchurch grows from 407,700 to 509,000 people in the 30 year period, which is 47% of growth in the Greater Christchurch area.
- ❖ Selwyn grows from 82,000 to 162,800 people in the 30 year period, which is 38% of growth in the Greater Christchurch area.

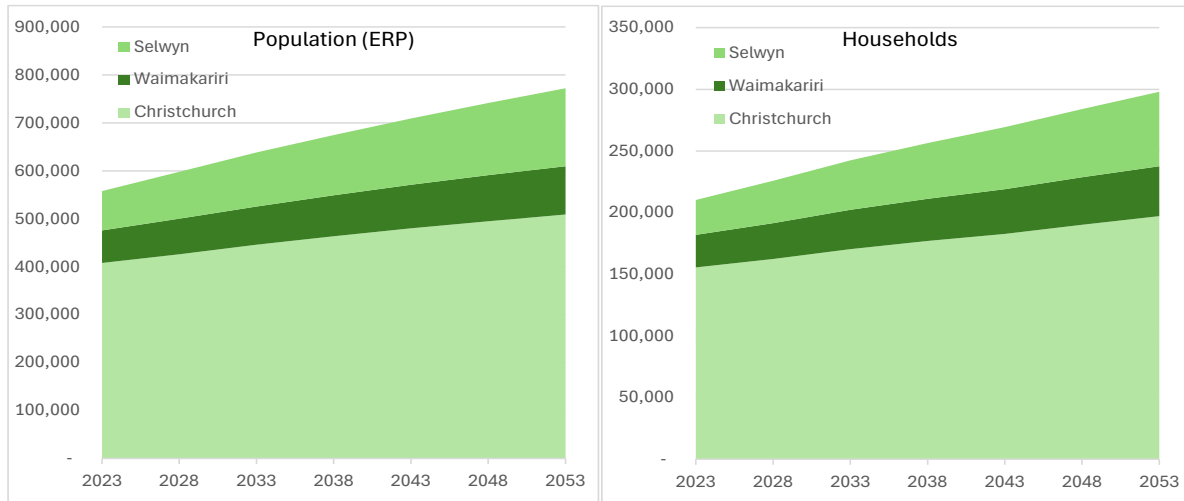
⁷ Statistics New Zealand (2025) Projected population subnational 2023 base - Christchurch (Medium) Formative (2025) Inform Waimakariri – (High).
Formative (2025) Inform Selwyn – (Medium).

⁸ Statistics New Zealand (2025) Estimated Residential Population 1996-2023.

- ❖ Waimakariri grows from 68,000 to 100,600 people in the 30 year period, which is 15% of growth in the Greater Christchurch area.

We note that the future is inherently uncertain, and the projection for each territorial area has been selected by each of the councils because this scenario is the one that is most likely to occur or is the expected outcome. Although not yet formally adopted by Council resolution, these projections are in our opinion, the most likely basis for future planning (see Appendix D for details).

Figure 2-2: Greater Christchurch Growth Projections – Population and Households, 2023-2053



The details of the demographics are not discussed in this targeted update, however there is expected to be a shift towards smaller households, with population aging and fertility dropping. This outcome has implications in terms of household formation and types of dwellings required, which are incorporated within the estimation of households in this assessment.⁹

For the entire Greater Christchurch area, the number of households is projected to increase from 210,300 in 2023 to 298,100 by 2053, and is a growth rate of 1.2% per annum. Relative to the population, the quantum of growth in Christchurch is higher because the trend towards smaller households is expected to be greatest in this part of the Greater Christchurch area.

The projections applied suggest that:

- ❖ Christchurch grows from 155,600 to 197,100 households in the 30 year period, which is 47% of growth in the Greater Christchurch area.
- ❖ Selwyn grows from 28,300 to 60,500 households in the 30 year period, which is 37% of growth in the Greater Christchurch area.
- ❖ Waimakariri grows from 26,400 to 40,500 households in the 30 year period, which is 16% of growth in the Greater Christchurch area.

⁹ Note that this assessment does not simply apply a conversion of people to households using an average household size. It applies the demographics within the population and living arrangement and family formation rates sourced from Statistic New Zealand.

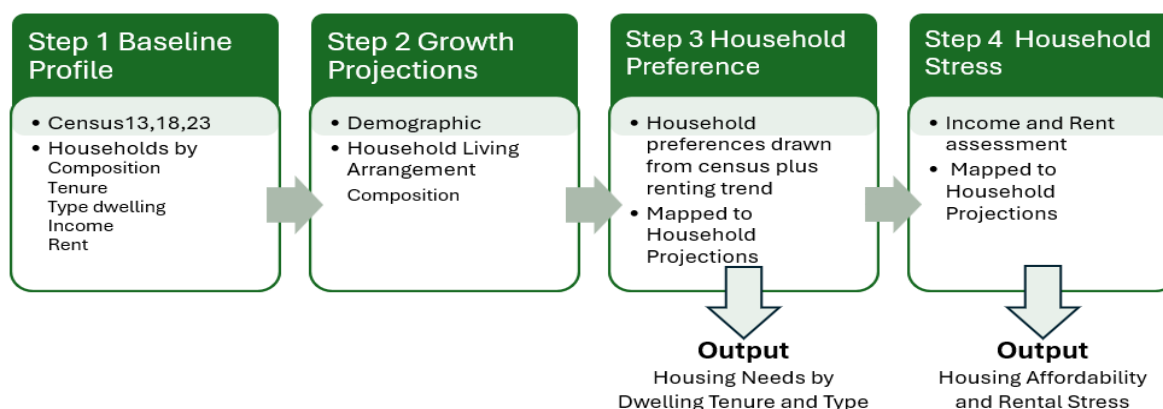
2.3 Overview of Method

In summary, the adopted method uses a framework to project future housing demand, affordability, and need. It starts with census-based profiles of current households to establish the baseline profile within the Greater Christchurch area (Step 1). Demographic projections are then drawn in to establish the number of households and their composition, which is estimated for the future out to 2053 (Step 2).

Next, future household preference is established, which is undertaken by combining the matrix of census preferences, household projections, and with tenure changes modelled using historical trends observed in the previous census¹⁰ (Step 3). The output of this step is an estimate of different dwelling types through tenure matrices.

The final step combines growth projections with income and housing cost data to assess affordability and housing stress. The output of Step 4 are estimates of current and future housing need including financially stressed households, social and emergency housing occupants.

Figure 2-3: Housing Need and Affordability Framework



The following key assumptions are applied in the modelling:

- ❖ Household formation applies Living Arrangement Types Rates (Variant B), the standard methodology used by Statistics New Zealand in its household projections.
- ❖ There are no significant changes to national policy settings relating to social and public housing provision over the projection period.
- ❖ Housing costs and household incomes continue to grow broadly in line with recent economic trends.

Together, these assumptions influence both the number and composition of households, and their preference for and capacity to afford housing.

¹⁰ The change observed in each of the territorial areas between 2006 and 2023 censuses has been adopted.

3 Housing Needs and Affordability

Housing need and affordability have been projected by dwelling tenure and dwelling type, as well as in terms of rental stress. Broadly, this segmentation of the housing market enables policymakers to better understand the types of housing that should be provided across the market and the scale of need reflected in the rental sector. The report also provides an estimate of the housing continuum, spanning owner-occupiers, private renters, and households supported through other forms of housing, including social and emergency accommodation.

3.1 Housing Needs by Dwelling Tenure and Type

The following table shows the households within Greater Christchurch by the types of dwellings and tenure. The modelling assumes a shift towards renting, based on trends observed across the previous four Censuses, with the proportion of renter households in the Greater Christchurch area projected to reach 32% by 2053. In summary the results show:

- ❖ **Renters:** increase by approximately 31,600 between 2023 and 2053. Most of them located in Christchurch (73%). A large share being 2 or fewer bedrooms (41%) and a growing number live within multi unit dwellings (35%).
- ❖ **Owner-occupied:** increases by approximately 56,300 between 2023 and 2053. Growth is mostly located in Selwyn and Waimakariri (67%), and large share in 3 bedrooms or more dwellings (88%).

Figure 3-1: Greater Christchurch Growth Projections – Households, by Tenure and type 2023-2053

		Owner occupiers				Renters			
		Standalone		Multi unit		Standalone		Multi unit	
		2- bdrm	3+ bdrm	2- bdrm	3+ bdrm	2- bdrm	3+ bdrm	2- bdrm	3+ bdrm
Waimakariri	2023	1,950	18,010	1,480	390	750	2,770	890	140
	2033	2,260	21,240	1,690	460	1,000	3,760	1,180	190
	2043	2,600	24,400	1,960	530	1,110	4,150	1,310	210
	2053	2,970	27,270	2,270	600	1,230	4,460	1,470	220
	23 to 53	1,020	9,260	790	210	480	1,690	580	80
Chch City	2023	10,540	75,100	11,590	4,880	6,590	22,770	19,460	4,670
	2033	10,960	81,810	11,720	5,190	7,450	26,270	21,690	5,390
	2043	11,350	85,950	12,020	5,410	8,310	29,680	23,970	6,080
	2053	11,990	90,040	12,780	5,700	9,370	33,260	27,170	6,820
	23 to 53	1,450	14,940	1,190	820	2,780	10,490	7,710	2,150
Selwyn	2023	1,200	20,900	500	310	680	4,170	400	160
	2033	1,640	29,380	680	430	1,040	6,190	610	240
	2043	2,110	37,530	870	560	1,260	7,390	740	290
	2053	2,630	45,100	1,120	670	1,490	8,320	890	320
	23 to 53	1,430	24,200	620	360	810	4,150	490	160

3.2 Housing Affordability and Rental Stress

Housing need is defined as the total number of renter households within a community that require some form of assistance to meet their housing requirements. Total housing need comprises several distinct groups, including:

- ❖ Households that pay more than 30% of their gross income as rent (i.e. stressed).
- ❖ Households that live in public housing, Kianga Ora or community housing providers.
- ❖ Households that are homeless or requiring housing.

The results suggest that housing need has increased in Greater Christchurch. The number of households with housing need was estimated to be 35,000 in 2018 which has increased to 36,300 in 2023. Housing need is projected to increase by 16,400 households between 2023 and 2053, reaching a total of 52,600. This can be compared with the HNA 2021, which projected an increase of 16,310 households over the 30-year period from 2018 to 2048, reaching 51,670 households.

In nominal terms, most of the increase in housing need is projected to be in Christchurch (76%). However, there is also projected to be large proportional increase in Selwyn, with need more than doubling in this area. Waimakariri is also projected to see a proportionally large increase, with housing need rising by more than three quarters over the next 30 years.

Figure 3-2: Greater Christchurch Housing Need Projections 2023-2053

		Housing Need	Need as % of	
			All Renters	All Households
Waimakariri	2023	2,830	62%	11%
	2033	3,710	61%	12%
	2043	4,130	61%	11%
	2053	4,560	62%	11%
	23 to 53	1,730		
Chch City	2023	31,250	58%	20%
	2033	34,950	57%	21%
	2043	38,640	57%	21%
	2053	43,530	57%	22%
	23 to 53	12,280		
Selwyn	2023	2,170	40%	8%
	2033	3,230	40%	8%
	2043	3,900	40%	8%
	2053	4,520	41%	7%
	23 to 53	2,350		

Furthermore, changes in rents and incomes have not been evenly distributed across households, with those already experiencing housing stress seeing larger pressures. For example, between 2018 and 2023 the average rent paid by stressed households in Greater Christchurch increased by around \$60

per week, while their gross income rose by around \$80 per week. Before accounting for tax, this implies that more than 76% of the increase in gross income would be required to meet higher rental costs. Additionally, inflation over the period is likely to have reduced the real purchasing power of stressed households, leaving them materially worse off compared with 2018.

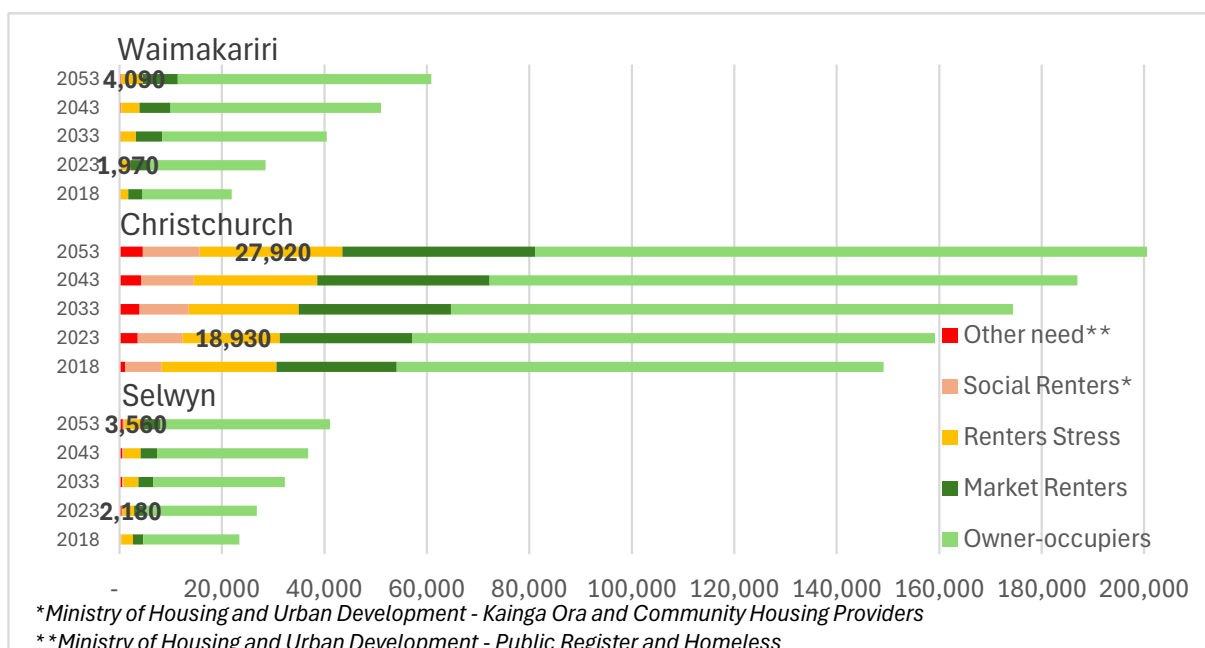
3.3 Housing Continuum

The following figure provides a breakdown of the housing continuum projected to 2053. First, we note that the modelling assumes that government support (social renters and other need) continues to be targeted at Christchurch. This is why these aspects of the housing continuum do not show up in the figure below for Selwyn and Waimakariri. As the population grows in these surrounding areas, the increasing need for support could potentially result in government providing more support in Selwyn and Waimakariri.

Second, we consider that while housing is becoming relatively more affordable in Greater Christchurch for many households that can afford to own or rent (i.e. green in Figure 3-3). There is still a growing number in absolute terms that need support, either renters that are stressed or other needs. The number of stressed renter households is projected to grow by approximately 12,500 over the 30-year period:

- ❖ Christchurch is projected grow by approximately 9,000 over the 30-year period.
- ❖ Selwyn is projected grow by approximately 2,100 over the 30-year period.
- ❖ Waimakariri is projected grow by approximately 1,400 over the 30-year period.

Figure 3-3: Housing Continuum Greater Christchurch Area, 2023 and 2053



4 Conclusion

This targeted housing need assessment shows that Greater Christchurch will experience substantial growth in both renter and owner-occupied households to 2053, with a growing shift toward renting (particularly in Christchurch City). In contrast, growth in owner-occupied households will be more concentrated in Selwyn and Waimakariri. Future housing demand will vary by dwelling type, with growing demand for smaller dwellings and multi-unit housing increasingly important for renters, while larger homes will continue to dominate owner-occupied growth.

Housing need and rental stress are projected to rise across the region over the next 30 years. Although Christchurch will continue to account for most households requiring assistance, Selwyn and Waimakariri are expected to experience the fastest proportional increases in housing need. The housing continuum analysis indicates that, while most households will remain able to meet their housing costs, the absolute number requiring support (stressed renting, social housing, or emergency accommodation) is expected to grow over the next 30 years.

Overall, the findings highlight the need for a diversified housing supply and proactive policy responses. Targeted affordability measures will be required to help disadvantage groups in the community and potential expansion of support services beyond Christchurch, to manage rising rental demand and increasing housing stress across the wider region.

To address the growing housing need, rising rental stress, and the shift toward smaller households and attached dwellings in Greater Christchurch, urban planning and development should encourage the delivery of smaller, attached housing types (such as townhouses, duplexes, and apartments). These dwellings can provide more choice and better meet the needs of renters and smaller households, provide more affordable options. The JHAP is investigating interventions to encourage affordable housing development, ensuring the housing supply matches projected demand along the housing continuum.

We consider that the recent changes in planning frameworks¹¹ in Greater Christchurch area will provide ample opportunity for the market to develop housing for owner-occupiers and renters in the private market that can afford market rents. That is the supply of larger/detached dwellings should and will continue to be provided in Christchurch, Selwyn and Waimakariri. However, we agree that the focus of the JHAP should be on the provision of housing for the most vulnerable in the community, as has been the case in the earlier phases of research.

¹¹ Selwyn, Waimakariri, and Christchurch have each adopted Intensification Planning Instruments that expand the range of areas for development across Greater Christchurch. In addition, Selwyn and Waimakariri have largely operative new District Plans, which further broaden development opportunities within those districts.

Appendix A: Growth Projections

Population Projections	2023	2033	2043	2053
Waimakariri	68,000	79,942	91,060	100,582
Christchurch	407,700	445,700	479,900	509,000
Selwyn	82,000	112,696	137,998	162,814

Household Projections	2023	2033	2043	2053
Waimakariri	26,370	31,773	36,275	40,480
Christchurch	155,590	170,480	182,769	197,133
Selwyn	28,328	40,070	50,308	60,477

Appendix B: Housing Continuum

		Market		Housing Need			Housing Need % all HH	
		Owner-occupiers	Market Renters	Renters Stress	Social Renters*	Other need**		Total
Waimakariri	2023	21,830	2,130	2,180	240	410	2,830	11%
	2033	25,650	2,910	2,930	290	490	3,710	12%
	2043	29,490	3,210	3,240	330	560	4,130	11%
	2053	33,110	3,450	3,560	370	630	4,560	11%
	23 to 53	11,280	1,320	1,380	130	220	1,730	
Chch City	2023	102,110	25,810	18,930	8,750	3,570	31,250	20%
	2033	109,680	29,760	21,450	9,590	3,910	34,950	21%
	2043	114,730	33,590	24,170	10,280	4,190	38,640	21%
	2053	120,510	37,610	27,920	11,090	4,520	43,530	22%
	23 to 53	18,400	11,800	8,990	2,340	950	12,280	
Selwyn	2023	22,910	3,400	1,970	40	160	2,170	8%
	2033	32,130	5,080	2,940	60	230	3,230	8%
	2043	41,070	6,070	3,540	70	290	3,900	8%
	2053	49,520	6,840	4,090	90	340	4,520	7%
	23 to 53	26,610	3,440	2,120	50	180	2,350	

*Ministry of Housing and Urban Development - Kainga Ora and Community Housing Providers

**Ministry of Housing and Urban Development - Public Register and Homeless

Appendix C: Housing Affordability

For this appendix, we have adopted the same methodology used in the HNA 2021. Median rental values have been sourced from MBIE, lower-quartile house prices from Quotable Value, and household income data from the Census.¹² Household incomes for 2025 have been estimated by extrapolating forward using the rate of income growth observed between the 2018 and 2023 Census periods.

The data applied in this assessment are presented below. Overall, median household incomes have increased faster than median rents and Lower-quartile house prices in Christchurch and Selwyn. In Waimakariri, the opposite has occurred, with rents and Lower-quartile house prices rising more quickly than median incomes.

	Waimakariri District			Christchurch City			Selwyn District		
	Median Rent*	Lower Quartile HP**	Median Household Income***	Median Rent*	Lower Quartile HP**	Median Household Income***	Median Rent*	Lower Quartile HP**	Median Household Income***
2013	\$ 388	\$ 325,000	\$ 68,800	\$ 357	\$ 336,000	\$ 65,300	\$ 408	\$ 399,500	\$ 85,100
2018	\$ 389	\$ 380,000	\$ 79,000	\$ 361	\$ 344,500	\$ 73,900	\$ 430	\$ 481,500	\$ 103,100
2023	\$ 527	\$ 504,800	\$ 91,200	\$ 487	\$ 459,600	\$ 90,600	\$ 566	\$ 586,800	\$ 122,100
2025	\$ 556	\$ 516,700	\$ 97,900	\$ 512	\$ 487,500	\$ 99,800	\$ 586	\$ 615,800	\$ 132,600

*MBIE Median Rent year end November.

**Quotable Value Housing Price Index, lower quartile house price in March.

***Census household income, and 2025 assumes growth income continues at the rate observed between 2018 and 2023 census.

As noted above, there are slight differences between the data used in the HNA 2021 and the table presented in this appendix. In particular, median rents and median household incomes differ for 2013 and 2018, which in turn means that the affordability metrics set out below vary slightly from those reported in the HNA 2021.

First, the rental affordability metric is calculated by converting annual household income into a weekly figure and comparing this to the median rent. The results indicate that rental affordability has potentially improved slightly for the average household across Christchurch and Selwyn. As noted above, household incomes have increased by more than rents, meaning that renting has become more

¹² The HNA 2021 relied on the same underlying data sets, however differences arise because some inputs relate to different time periods or have subsequently been revised. MBIE rental data are published on an annual year-end basis. We believe that the HNA 2021 applied year-end June figures, whereas our assessment uses latest year-end November data. This timing difference results in rents being on average approximately 1% higher in our analysis. In addition, the 2018 Census was affected by a low response rate and was later substantially revised using administrative data sources. We consider it likely that the HNA 2021 was based on the original (unrevised) Census dataset. The subsequent revisions means that household income levels now differ from those presented in the HNA 2021, with the earlier figures around 2% lower on average.

affordable for most households. In Waimakariri, rental affordability has deteriorated between 2013 and 2023, however estimated to have slightly improved since 2023.

Second, the home ownership affordability metric is calculated using lower-quartile house prices, a 10% deposit, the Reserve Bank of New Zealand variable mortgage interest rate, monthly repayments, and a 25-year table mortgage. Recently all of the districts have become relatively more (i.e. 2023 to 2025). However, all areas have become less affordable over the period 2013 to 2023.

	Waimakariri District		Christchurch City		Selwyn District	
	% of MHI to pay median rent	% of MHI to service mortgage*	% of MHI to pay median rent	% of MHI to service mortgage*	% of MHI to pay median rent	% of MHI to service mortgage*
2013	29%	32%	29%	35%	25%	32%
2018	26%	33%	25%	32%	22%	32%
2023	30%	46%	28%	42%	24%	40%
2025	30%	41%	27%	38%	23%	36%

*applies RBNZ interest rate (variable), 10% deposit, monthly payments, and 25 year term.

Finally, we note that most households are not exposed to variable interest rates and instead use fixed-term mortgages to manage financing costs. If fixed interest rates were applied, affordability outcomes would be more positive than those shown in the table.¹³ If 1-year fixed rate was applied then mortgage servicing affordability of housing in Waimakariri would be 36%, Christchurch would be 34%, and Selwyn 32%, which would be fairly similar to the level in 2013 and hence a greater improvement relative to the peak in unaffordability in 2023.

¹³ The variable rate has increased from 5.8% in 2013 to 7.24% in 2025, while the most popular fixed term rate of 1year only increased from 5.4% in 2013 to 5.9% in 2025. The difference in the spread is significant when assessing servicing requirement.

Appendix D: Growth Projections

The future is inherently uncertain, and growth projections commonly include multiple scenarios to illustrate the potential range of outcomes. However, the focus of this targeted research was to update the previous housing needs assessment, which applied the most likely growth scenario and did not assess a range of alternative scenarios. There are also higher and lower growth scenarios that could be adopted, which would result in different levels of housing need and demand, assessing this full range of potential outcomes was beyond the scope of this targeted housing needs assessment.

The projection adopted in this assessment for each territorial area has been selected by the relevant council on the basis that it represents the most likely or expected growth outcome. The formal adoption of these projections by Council resolution, may not occur until after this report is finalised. We understand that Waimakariri District Council and Christchurch City Council have begun to incorporate these projections into planning, and that Selwyn District Council is currently in the process of doing so.

Furthermore, this assessment has been undertaken at the territorial authority level, with no analysis below this spatial extent. While other council workstreams (such as infrastructure planning, transport modelling, and NPS-UD assessments) may require finer spatial resolution, these will remain consistent with this report. This is because these other assessments apply a top-down approach, whereby total growth at the territorial level is fixed, regardless of how that growth is distributed across smaller geographies within those assessments.

The following text briefly outlines why each council has selected the growth projection scenario for their planning purposes. It was beyond the scope of this report to review this selection.

Christchurch City Council: for the development of the 2027 Long Term Plan, CCC will be using the Stats NZ Medium population growth scenario which is based on 2023 Census and released in 2025. Typically, CCC have used Stats NZ population projections for planning across the organisation.

In summary, CCC consider that actual growth in Christchurch has historically tracked very closely to the Medium growth as projected by Stats NZ. Therefore, CCC consider that the Medium projections have been a reliable indicator as to the level of growth that the city can expect and have provided a sound basis for their planning. Also, that Stats NZ are best 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.

Waimakariri District Council: for the development of the 2027 Long Term Plan, WMK is planning to use the Stats NZ High population growth scenario which is based on 2023 Census and released in 2025.

Historically, WMK have used High Stats NZ population projections or a variant (medium-high), which is higher than the medium.

In summary, this projection was recommended by Formative, because of the observed strong level of new dwelling building consents, which have continuously been above the medium projection. Also, development activity may increase over the coming years as the economic outlook improves, major transport infrastructure is developed, and as a result of the substantial development capacity enabled through the partially operative District Plan. Additionally, Formative's independent projection is closer to the new Stats NZ 2025 High projection than the Stats NZ 2025 Medium projection. Therefore, the High projections have been a more reliable indicator as to the level of growth that the district can expect and have provided a sound basis for their planning.

Selwyn District Council: historically, SDC have used High Stats NZ population projections or a variant (medium-high) for planning across the organisation. The growth in the district has consistently outperformed the Medium Stats NZ population projections, primarily driven by larger net internal migration than assumed by Stats NZ. SDC is planning to use the Formative Medium projection which sits between the High and Medium Stats NZ Projection.

In summary, this projection was recommended by Formative due to the sustained strong net migration to Selwyn and the demographic profile of this population, which our modelling indicates is likely to persist. This results in both higher natural increase and net migration relative to the Stats NZ Medium projection. This conclusion is further supported by the high level of new dwelling consents in the district, which have consistently exceeded the Medium projection. Moreover, development activity may strengthen further as the economic outlook improves, major transport infrastructure projects are delivered, and the substantial development capacity enabled through the partially operative District Plan is progressively taken up. Therefore, we consider that the Formative Medium is likely to provide a more reliable projection than the Medium Stats NZ projection.