Christchurch City Council

# Environmental Scan 2026

Christchurch City Council

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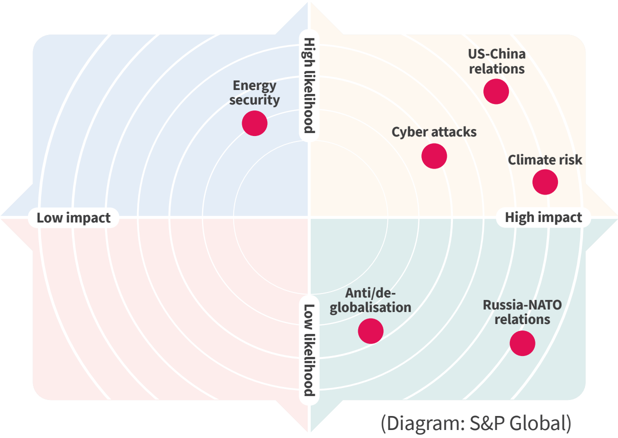
# Geopolitical environment and influences

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

**Likelihood and impact of top 2025 geopolitical risks:**




(Diagram: S&P Global)

Rising tariffs and trade uncertainty are straining supply chains, raising costs, and delaying investment across sectors globally.

The World Economic Forum notes that geopolitical tensions are diverting focus and funding from climate goals, delaying cooperation and increasing emissions.

The International Energy Agency (IEA) warns that reliance on a few suppliers for critical minerals makes supply chains vulnerable, urging diversification to avoid economic and technological risks.

In January 2025, the United States signalled its withdrawal from the Paris Agreement, sparking concerns about the potential impact on global participation in climate change negotiations and implementation, particularly among other nations and local governments.

S&P Global reports that long-term inflation will be shaped by geopolitical factors, economic capacity, wage growth, corporate pricing, and public expectations.

In their report Top geopolitical risks 2025, KPMG identified five critical trends that New Zealand businesses should consider:

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

While local government in New Zealand may be less exposed to some of these risks than other sectors, it is unlikely to be immune. Several of these trends could still affect our operational resilience and increase the cost and/or complexity of providing infrastructureand services..

# Global economy

**The global economy faced a series of shocks from 2020 to 2024, with ongoing trade policy uncertainty continuing to disrupt markets in 2025.**

Despite ongoing shocks, the global economy is recognised as resilient in 2025 following a period of significant disruption from 2020 to 2024. However, the outlook remains fragile. Positive sentiment driven by the potential for strong AI-related investment is tempered by ongoing trade barriers and continued uncertainty. (OECD, December 2025)

**Global GDP growth is projected at 2.7%–3.3% in 2026 and 2.9%–3.2% in 2027, reflecting ongoing challenges such as weak investment, low productivity, and high debt.** (UN DESA; IMF; World Bank)

Experts broadly agree that global economic growth in 2026 will drop slightly from 2025, and although the global market has shown resilience, there remains fragilities in sustained trade tensions and geopolitical risks and uncertainty, although somewhat balanced by strong investment outlooks for tech and AI.

Global inflation remains expected to ease in 2026 and 2027. Trade tensions have eased although geopolitical tension flare-ups remain a risk to global economic stability. Strong AI related investment provides promise in boosting productivity gains and improving business dynamism. (International Monetary Fund, 2026)

**As measured by the Consumer Price Index, year-on-year inflation in the OECD fell to 3.9% in November 2025.** (OECD)

Uncertainty in global policy is not only causing tangible disruptions but also shifting business leaders' perceptions, with trade policy (especially tariffs) now seen as a greater threat to global growth than geopolitical instability. (McKinsey Global Survey, 2025)

# Geopolitical landscape

New Zealand's geopolitical and economic landscape is being shaped by a mix of global disruptions and domestic reforms.

Since WWII, New Zealand has operated within a rules-based international system that fosters stability and global cooperation. (MFAT)

While China remains a key partner, New Zealand is strengthening relationships with India, ASEAN, and Canada to reduce reliance. (MFAT)

**The New Zealand economy continues to recover, after economic growth slowed mid-2025, with predictions that the CPI level will continue to trend towards the mid-point of the target band by mid-2026.** (RBNZ, December 2025)

The government has committed to doubling New Zealand's spending on defence to 2% of GDP by 2032, amid ongoing global geopolitical tension. (Government Press Release, April 2025)

As one of the world's most open economies, New Zealand benefits from regional and global stability and broad market access. Total exports from New Zealand were $95.0 billion in 2024, an increase of 4.0% compared to the previous year. (Infometrics, 2025)

**In the September 2025 quarter New Zealand exported $25.0 billion of total goods and services to the rest of the world and imported $30.7 billion, representing a trade balance of -$5.7 billion and a total trade value of $55.7 billion.** (StatsNZ, September 2025)

One in four jobs in New Zealand can be linked to producing goods and services for export. (MBIE)

**The Government has a target to double the value of New Zealand's exports in 10 years (by 2034) and is committed to attracting greater high-quality investment to raise productivity and drive economic growth in New Zealand.**
(Going for Growth, February 2025)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# Economic outlook

Economic pressures persist despite easing inflation, with households facing rising costs and slowing growth.

Annual CPI inflation rose to 3.1% in the period to December 2025. This now breaches the top of the Reserve Bank's 1–3% target band, however, based on the November 2025 Monetary Policy Statement, generally economists continue to project that inflation will ease to the 2% midpoint by mid-2026.

The Reserve Bank has steadily reduced the Official Cash Rate (OCR) since July 2024, with the latest 25bp cut bringing it to 2.25% in November 2025 (and unchanged in February 2026). The OCR is projected to remain steady, and at its current level is considered stimulatory to contribute to economic recovery while also allowing CPI to converge to the mid-point of the target band.

**Inflation is expected to ease through 2026, reflecting the Reserve Bank's ongoing commitment to its 1–3% target band. However, this outlook remains sensitive to shifts in broader economic conditions.**

Lower interest rates are anticipated to support a rebound in growth post-2026. GDP is forecast to average 3% over three years before tapering off due to weak labour productivity.

Consumer confidence has lifted strongly to the highest level since August 2021, with increases to both the forward-looking and current condition indices. (ANZ, January 2026)

**Household financial pressure continues to build, driven by rising unemployment (5.4% in December), slower wage growth, falling house prices, depleted savings, and persistent inflation.**

The unemployment rate has risen to 5.4% in the December 2025 quarter, with the underutilisation rate remaining at 13% and the employment rate rising to 66.7%, meaning there has been a minor increase in the overall job market within New Zealand. (StatsNZ, February 2026)

Food price increases are particularly felt, with annual growth between 5.0% and 4.0% from August to December 2025 compared to the same months in 2024. (StatsNZ, January 2026)

New Zealand's ageing population is a major driver of fiscal pressure in New Zealand, with the ratio of working-age people to retirees projected to fall from 7:1 in 1965 to just 2:1 by 2065. (Treasury Long Term Fiscal Statement, 2025)

**The tourism sector contributed $17 billion towards GDP in New Zealand in 2024. This amounted to 3.9% of New Zealand's economic output in 2024 as compared to 4.9% in 2000.**

Climate change adaptation, defence spending, and infrastructure investment are expected to compound national fiscal challenges in the long term. The cost of government responses to shocks has averaged 10% of GDP per decade. (Treasury Long Term Fiscal Statement, 2025)

# Population (current and future)

Christchurch's population is growing steadily, with rapid expansion in some suburbs driven by strong greenfield and infill growth.

**As at June 2025, the estimated population of Christchurch city was**

**419,200**

Some areas of Christchurch are growing faster than others. In the last 5 years, the areas of significant growth include: Yaldhurst – up 47%, Marshland – up 43%, Halswell – up 32%, Broomfield – up 25%, City Centre – up 24%.
(StatsNZ, Subnational Population Estimates)

Christchurch's population is projected to increase by over 150,000 people by 2075, growing by around 18,800 people in the next 5 years, 37,800 people in the next 10 years, and 152,900 people in the next 50 years.

**The total population is projected to reach around 567,800 in 2075.**

(StatsNZ, Subnational Population Projections)

Christchurch is part of a broader urban area that includes parts of the Selwyn and Waimakariri districts. Together, these areas are expected to grow significantly, **potentially reaching 700,000 people by 2050, and possibly up to 1 million in the longer term.**

(StatsNZ, Subnational Population Estimates)

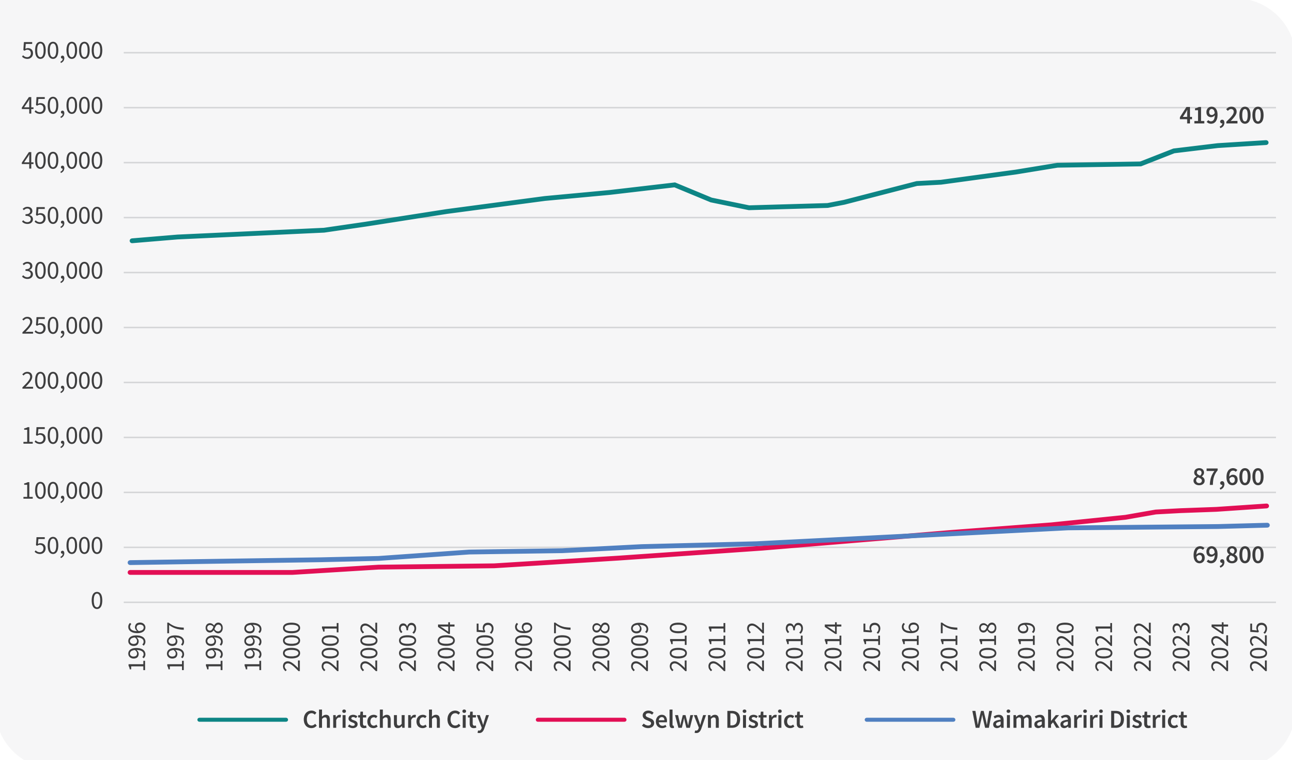
Neighbouring districts Selwyn and Waimakariri had a combined population of 157,400 (Selwyn: 87,600 / Waimakariri: 69,800).

**In 2023, around 37,000 people commuted to Christchurch city for work.**

Almost 34,000, or 92%, of these commuters were from Selwyn and Waimakariri districts (up from 21,000 in 2018), which is around 40% of each of these district's working population. (StatsNZ, 2023)

The Greater Christchurch settlement area had an estimated population of 539,000.

## Greater Christchurch population




### What does this mean for 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.
- As Christchurch grows and becomes more diverse, it's worth considering whether the Council's current planning will meet the needs of a diverse population with varied needs and priorities, or whether we need to better understand where those needs might compete.
- 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. This places increasing demand on Christchurch's infrastructure and services, despite these commuters residing outside the city's rating base.
- The Council may want to consider whether joined-up planning for shared services and networks with our neighbouring districts could help ease some of the pressures the city is facing from non-residents.

# Age

Christchurch's population is ageing, with slower growth in the numbers of young people and a rising share of older residents.

## Median age

**Christchurch: 37.6 years**
**Selwyn: 37.9 years**
**Waimakariri: 45.1 years**

(StatsNZ 2025 estimates)

**Christchurch's median age is similar to that of New Zealand (38.2 years) and neighbouring Selwyn District, but is relatively higher than the other major cities of Hamilton, Wellington and Auckland (37 years or less).**

The proportion of working-age residents (67%) is consistent with other major centres except for Wellington (74%), and is higher than the national average of 65%.

Since 2000, the city's population has increased by 26% but different age cohorts have seen varying levels of growth. The population aged under 15 years has increased by 6% over this period, while the population aged 65 years and over has increased by 54%.

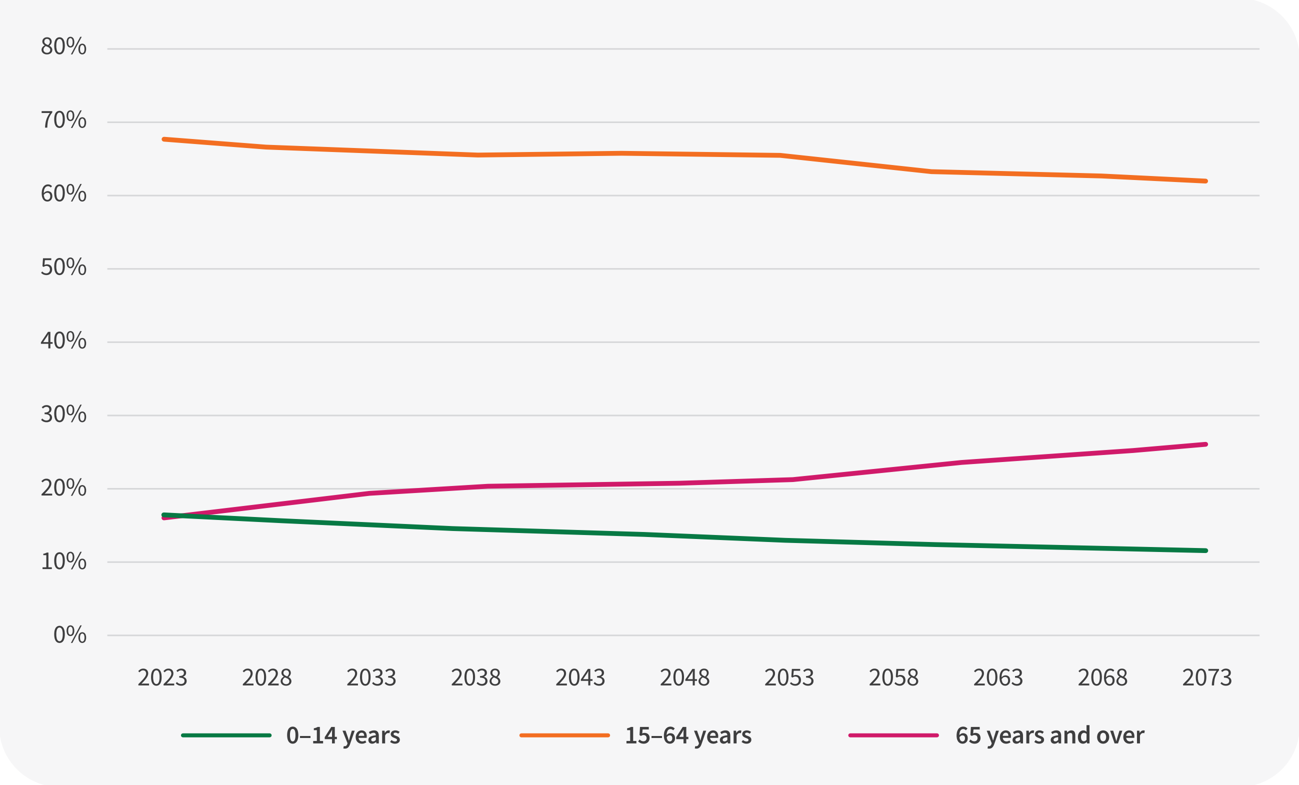
**Christchurch's population is ageing, with a growing proportion of the population aged over 65 years and slower growth among the younger cohorts of residents. As a share of the population, those aged under 15 years have fallen from 19.4% to 16.3%, while those aged 65 years and over have increased from 13.5% to 16.5%.**

Our population is expected to continue to age. Our working age population is set to fall from 67% of the population to 62% by 2073, while those aged 65 years and over are projected to increase from 16% to 26% of the city's population.

**The ratio of working-age people to retirees in New Zealand is projected to fall from 7:1 in 1965 to just 2:1 by 2065.**

(Treasury Long Term Fiscal Statement, 2025)

## Proportion of population by age




### What does this mean for the Council?

- Balancing the needs of older residents with those of younger and working-age populations may become more complex over time.
- A diverse range of housing will be needed to support an ageing population.
- With a goal of 20,000 central city residents and an ageing population, the Council may want to explore how to encourage accessible housing and amenities in the central city to make central city living work for people of all ages. (Central City Action Plan)
- An ageing population may increase demand for age-friendly infrastructure and accessible transport options.
- An ageing workforce could mean labour shortages in some industries if we fail to attract new residents to the city to fill these gaps.
- With an ageing population, the number of households living on limited, fixed incomes is likely to increase significantly in the short – medium term.

# Cultural diversity

Christchurch is becoming increasingly diverse. Nearly one-third of residents were born overseas, with strong growth in Asian communities, making Asian the second-largest ethnic group in the city.

Between June 2024 and June 2025, net international migration contributed 980 residents to the city's population growth, compared with 1,300 through natural increase.

Between 2001 and 2023, the proportion of the population identifying as European fell from 90% to 76%. (StatsNZ, 2023)

All other major ethnic groups proportionally increased over the same period, with the Asian ethnic group having the largest increase (from 6% to 17% of the population) to overtake Māori as the second largest ethnic group in the city.

**In 2025, just over two thirds (67%) of the annual population growth was from people moving to the city, from either overseas or elsewhere in New Zealand. 33% was from natural increase (i.e. births).**

The areas of the city with the highest proportion of overseas-born migrants include Wigram (almost half of residents, at 48%), Riccarton, Central City, Upper Riccarton and Sockburn.

On average, residents born overseas have lived in New Zealand for 17.5 years.

One third of overseas-born residents originated from SE or NE Asia, and one quarter were born in NW Europe.

Since 2013, those who can speak conversational Te Reo Māori has increased from 1.8% to 2.4% (5,900 to 9,600 people).

**Around 6% of the city's population identifies as LGBTIQ+.**

61% of Christchurch respondents to the 2024 Quality of Life Survey consider racism / discrimination towards particular groups of people to have been an issue in the city in the last year. This was the highest of all cities surveyed.

## What does this mean for the Council?

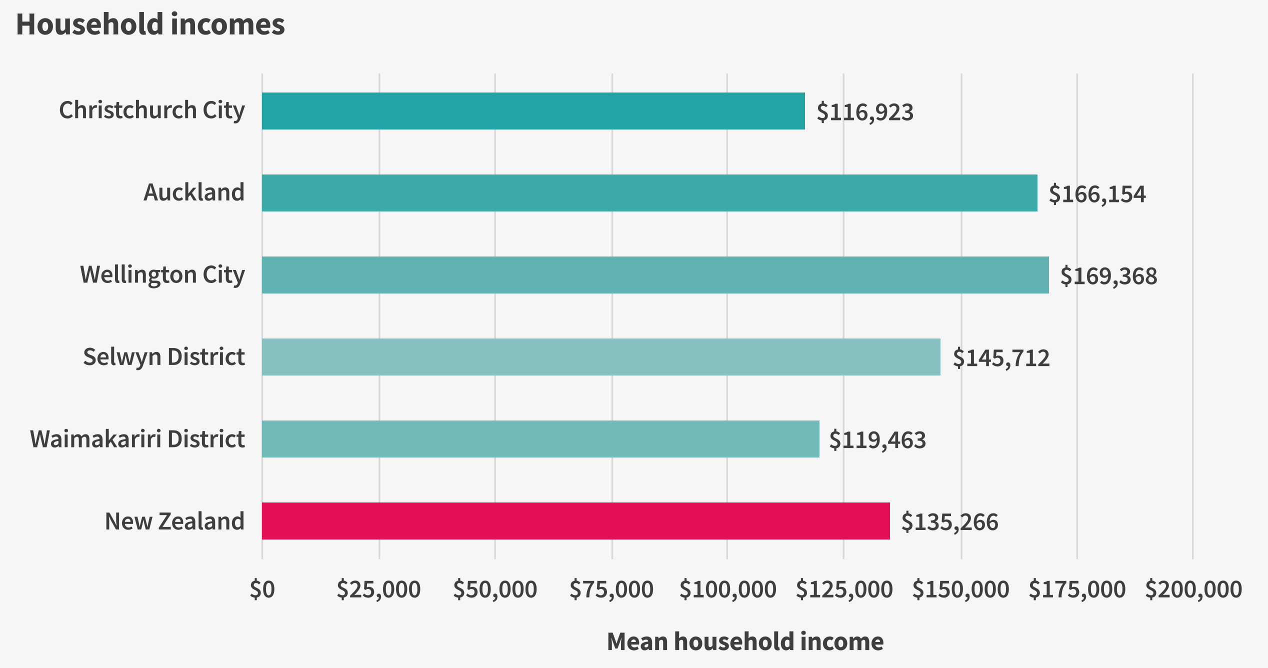
- Council might consider what elements are essential for ensuring Christchurch remains attractive and inclusive for current and future residents.
- The Council may also wish to consider how to support new residents in settling, accessing council services and support, and participating in civic life.
- An ageing population is likely to mean that there is additional reliance on migration to support our workforce in the future, particularly in response to continued investment in the city.
- Council has long faced challenges engaging some harder-to-reach communities, particularly migrant groups like Asian and Pacific peoples. The Council could consider exploring new ways to boost engagement with these harder-to-reach communities, and ensure their voices are reflected in shaping Christchurch's future.
- In the 2024–2034 Long Term Plan, the Council committed to strengthening engagement with Māori.

# Income and deprivation

Christchurch's average household income remains below the national average, with slow growth and more people living in areas of high socio-economic deprivation.

In 2025, the average household income in Christchurch was $116,923, well below the national average of $135,266.

Auckland and Wellington households earn significantly more, at $166,154 and $169,368 respectively.



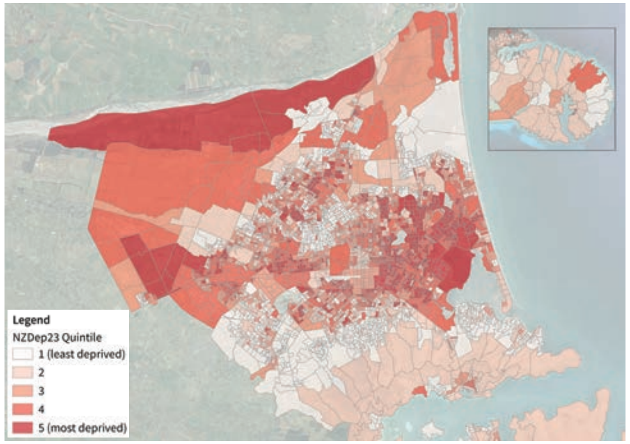
Mean household income is lower in Christchurch than in Selwyn ($145,712) and Waimakariri ($119,463).

15% of households in Christchurch earn $30,000 or less; 45% of households earn $100,000 or more. (Census 2023)

The city's average household income increased by 0.2% between March 2024 and March 2025, compared with a 1.8% household income growth rate for all of New Zealand.

**The proportion of Christchurch respondents who said they have 'enough' or 'more than enough' money to meet their everyday needs fell from 46% to 35% between the 2022 and 2024 Quality of Life surveys.**

15.6% of residents now live in areas of high socio-economic deprivation (deciles 9-10), up from 14.6% in the 2018 Census. These areas are mainly on the eastern side of Christchurch.




## What does this mean for the Council?

- Growing inequality can lead to social tension, reduced social mobility, and increased demand for support services.
- Reduced Council spending may have flow-on effects for the local economy, business activity, and the wellbeing of Christchurch residents, highlighting the importance of considering the broader economic and subsequent social impacts of the Council's budgeting decisions.
- Nearby districts such as Selwyn and Waimakariri have higher average household incomes than Christchurch, yet many of their residents gain significant benefit from Christchurch's infrastructure and services, largely funded by rates paid by households in the city.
- The Council may wish to consider advocating for more regionally coordinated funding models or cost-sharing mechanisms to ensure Christchurch ratepayers are not disproportionately subsidising infrastructure and services used by residents of higher-income neighbouring districts.
- High housing costs are placing significant financial pressure on residents, especially lower-income households, leading to increased rates arrears and declining perceptions of affordability.
- Historically, equity-release products have been used for one-off expenses, but future demand may shift toward supporting ongoing income needs.

# Demographics by ward

Detailed ward and community board profiles can be found on the Council website:
ccc.govt.nz/culture-and-community/statistics-and-facts/community-profiles

| Ward | Population* | Age | | | Ethnicity** | | | | Overseas born | Median household income |
|---|---|---|---|---|---|---|---|---|---|---|
| | | Median age | Under 15 years | 65 years and over | European | Māori | Pacific Peoples | Asian | | |
| **Christchurch City** | **391,383** | **37.5** | **17%** | **16%** | **75.9%** | **11.2%** | **4.3%** | **17.1%** | **28%** | **$90,600** |
| Banks Peninsula Ward | 9,195 | 50.9 | 14% | 23% | 93.1% | 9.5% | 1.5% | 3.0% | 27% | $89,400 |
| Burwood Ward | 25,245 | 38 | 19% | 16% | 81.0% | 17.0% | 7.0% | 8.4% | 18% | $89,000 |
| Cashmere Ward | 26,373 | 42.8 | 18% | 18% | 90.1% | 7.5% | 1.8% | 6.6% | 24% | $112,600 |
| Central Ward | 24,192 | 33.3 | 12% | 10% | 66.7% | 13.7% | 5.3% | 23.0% | 36% | $75,000 |
| Coastal Ward | 25,857 | 40 | 19% | 16% | 89.5% | 15.5% | 4.3% | 4.1% | 18% | $86,500 |
| Fendalton Ward | 25,122 | 40.9 | 17% | 19% | 78.3% | 7.7% | 2.6% | 17.1% | 28% | $114,000 |
| Halswell Ward | 28,590 | 37.2 | 19% | 16% | 67.1% | 6.3% | 2.2% | 29.5% | 34% | $117,000 |
| Harewood Ward | 25,470 | 42.4 | 16% | 21% | 80.6% | 9.3% | 3.1% | 14.2% | 23% | $94,500 |
| Heathcote Ward | 25,749 | 41.9 | 15% | 20% | 85.4% | 9.0% | 2.7% | 9.5% | 28% | $93,300 |
| Hornby Ward | 26,478 | 35.8 | 17% | 14% | 61.7% | 13.2% | 6.3% | 28.1% | 32% | $92,900 |
| Innes Ward | 25,035 | 35.3 | 15% | 15% | 78.0% | 11.7% | 4.0% | 15.1% | 27% | $84,800 |
| Linwood Ward | 23,577 | 36.7 | 18% | 14% | 74.7% | 20.4% | 9.7% | 10.9% | 21% | $69,300 |
| Papanui Ward | 25,137 | 38.6 | 18% | 18% | 78.9% | 11.3% | 3.7% | 15.0% | 24% | $88,000 |
| Riccarton Ward | 25,593 | 27 | 11% | 12% | 59.2% | 8.6% | 4.2% | 33.8% | 42% | $78,300 |
| Spreydon Ward | 25,773 | 35.4 | 17% | 14% | 74.4% | 12.6% | 5.6% | 16.8% | 28% | $85,400 |
| Waimairi Ward | 23,997 | 37.8 | 17% | 19% | 66.2% | 6.9% | 3.4% | 29.1% | 36% | $93,600 |

*Census usually resident population at March 2023. Any annual population estimates published since the census have been adjusted for population change and include residents not counted in the census
**Multiple response variable

# Annual and Long Term Plan feedback

Feedback on the 2023 and 2025 Annual Plans, and the 2024 Long Term Plan, have highlighted several consistent themes:

**Balancing services and affordability:** There's ongoing tension between maintaining service levels and keeping rates affordable. Some support higher rates to protect services and invest in infrastructure, while others prioritise lower rate increases due to cost-of-living pressures. Intergenerational equity is a recurring consideration.

**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. Public transport investment is broadly supported, especially in underserved areas.

**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?

- Our residents have competing priorities, opinions and values.
- Community views on rates and services vary, with some supporting higher rates and others concerned about affordability.
- Intergenerational equity is a recurring lens among feedback from residents.
- Some residents feel the Council could improve efficiency and reduce perceived unnecessary spending; specific examples are rare.
- 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.
- The Council likely faces a challenge in balancing the needs and preferences of today's residents with investment in infrastructure and services that will support future generations.

# Residents Survey

The 2024/2025 General Services Satisfaction Survey showed improving perceptions of the Council's service delivery across a broad range of services.

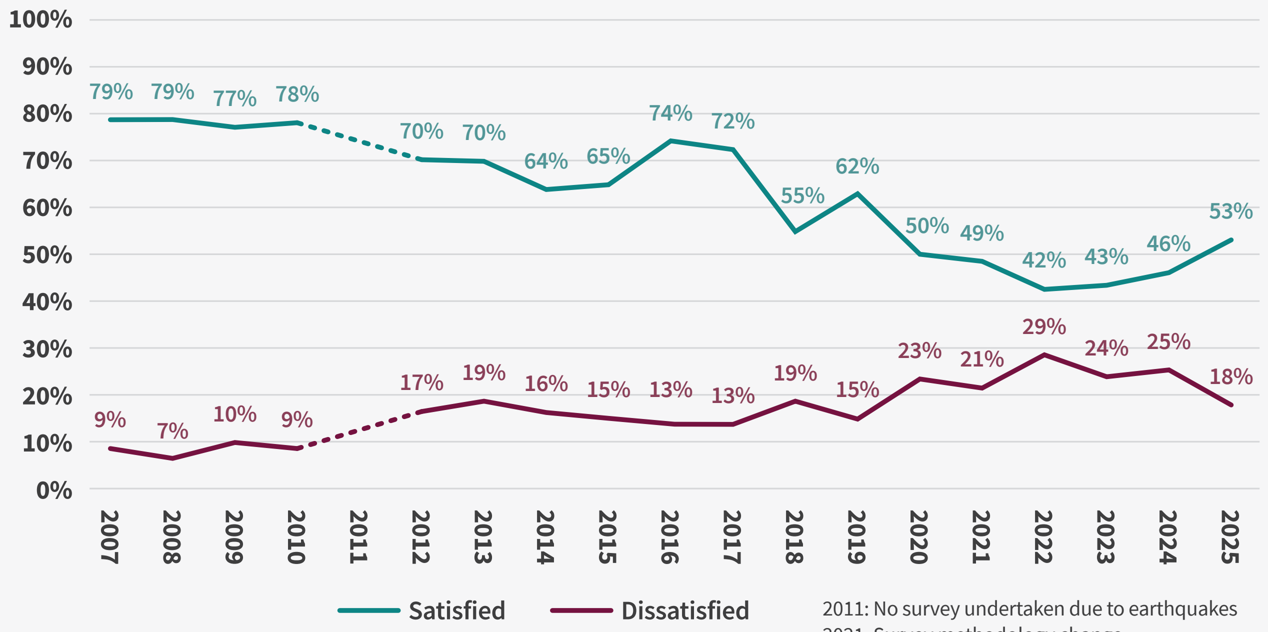
Services involving direct interaction with Council staff, such as libraries, education programmes, events, recreation and sport, and cemeteries, are our highest performing services, consistently achieving over 90% satisfaction. Hagley Park, the Botanic Gardens, and Mona Vale regularly receive near-perfect satisfaction scores.

As in previous years, waste management, parks and reserves, and libraries remain among the highest-rated services.

Overall satisfaction with the Council's performance (53%) has continued to increase from a low of 42% in 2022. Dissatisfaction (as opposed to a neutral response) with the Council's performance has decreased to 18%, the lowest since 2019.

Satisfaction with Council performance is driven by perceptions of overall competence, quality services, and well-maintained public amenities. Dissatisfaction stems mainly from concerns about road maintenance, spending decisions, and rate increases. These trends are consistent across a number of years.

### Satisfaction with Council performance




2011: No survey undertaken due to earthquakes
2021: Survey methodology change


## What does this mean for the Council?

- Roading and Council decision-making, including financial management, remain key concerns for Christchurch residents. Other frequently mentioned transport-related issues, such as parking, footpaths, and cycleways, round out the top five areas for improvement. These are also areas where residents typically have limited direct contact with Council staff, reinforcing the role that positive interactions with staff play in shaping a positive perception of Council services.
- Resident satisfaction does not always align with reported experiences. For instance, despite ongoing dissatisfaction with road conditions, generally residents still report that getting around Christchurch is easy.
- Younger residents generally report higher satisfaction with Council services, suggesting generational differences in expectations regarding both the scope and quality of service delivery.
- Positive results are often closely linked to the high level of resident interaction with Council staff, suggesting that positive staff engagement plays a key role in shaping positive perceptions of Council services.
- Resident dissatisfaction is highest for services that require the most capital to address – horizontal infrastructure (roads, footpaths, etc.).
- The Council may wish to consider options around how best to navigate the challenge of balancing community expectations with the need to deliver core services in a financially sustainable way.
- While resident satisfaction is improving, maintaining this may be difficult as central government reforms shift focus on essential services and away from some of the services residents value the most.

# Life in Christchurch 2024 and 2025

The Life in Christchurch Survey series are web-based surveys, undertaken regularly by the Council. These surveys typically receive around 3,500 responses per survey.

## Central city

Positive sentiment is increasing, with 59% expressing pride in the central city, with many describing it as vibrant or progressing (compared to 47% in 2022).

**Nearly two-thirds (65%) agree that the central city offers a variety of activities for all people, along with spaces where communities can gather, socialise, celebrate, and hold events.**

However, when it comes to living in the central city, more respondents disagree than agree that it provides a range of well-designed and/or affordable housing options.

We recently asked residents to identify their top five priorities for improving the central city over the next 10–15 years.

They told us they want Council to focus on:

- Ensuring there is easy and affordable access to the central city, regardless of travel mode
- Rebuilding, repairing, and revitalising damaged or vacant areas
- Making the central city safer and cleaner
- Preserving, enhancing, and increasing green spaces
- Creating a more vibrant central city environment.

## Transport

Cars remain the main mode of transport in Christchurch but 19% report using cars less often now compared to 12 months ago.

Travel by walking and public transport has seen an increase since 2022.

While the proportion of respondents travelling by bicycle has remained consistent over the past 3 years, 31% report they bike more often now compared to 12 months ago.

Satisfaction with the journeys taken when travelling by public transport, biking or walking has improved since 2022, sitting at 71%, 72% and 78% respectively. However, satisfaction with the journey when travelling by car remains lower at 51%.

## Housing and neighbourhoods

The vast majority (79%) believe that a safe neighbourhood is the most important feature when considering where to live. This is followed by a quiet neighbourhood (63%) and the character (59%).

Dangerous driving, theft and burglary, and traffic congestion are the top 3 challenges neighbourhoods feel they are facing.

The most preferred housing types (in the context of a growing population) are stand-alone detached houses (two- or three-story) or single-storey duplexes.

Less than a third of the respondents would consider living in two-or three-storey terraced houses or low-rise apartment buildings. To be more likely to consider this, privacy between neighbours, private outdoor living spaces, and/or internal garages/secured covered parking would be required.

## Climate adaptation

Concerns about climate change and its potential impact on individuals, neighbourhoods, and communities vary significantly across Christchurch's wards. City-wide, the main concerns are wind, river and rainfall flooding, and extreme conditions such as heat, drought, and wildfire.

Residents in coastal or near-coastal wards, such as Coastal, Heathcote, Banks Peninsula, and Burwood/Linwood, are more likely to believe their neighbourhoods are at greater risk from climate-related events.

The top personal concerns include the rising cost of insurance (61%), the ability to remain in their home during or after a severe weather event (41%), and potential damage to local infrastructure (41%).

Coastal and near-coastal residents feel more vulnerable to climate impacts, which may require more targeted support and adaptation strategies for these areas.

## What does this mean for the Council?

### Central city

- Maintaining the current sense of pride and building on recent momentum offers an opportunity to support the ongoing recovery and development of the central city.
- The priorities identified by survey respondents offer the Council a clear picture of the changes and improvements residents hope to see in the central city over the next 10–15 years.

### Transport

- The feedback suggests a growing openness to using alternative transport modes more regularly, indicating Council efforts to support transport choice are proving effective.
- Growing openness to alternative transport options suggests the Council is well-positioned to further promote and support transport choice.
- As our city and neighbouring districts continue to grow, increasing pressure will be placed on the city's transport network. This will likely influence public sentiment among both residents and commuters.
- To enable greater transport choice, the Council may wish to consider working collaboratively with other providers to explore new options within the city and consider when and where interventions may be appropriate to manage the impacts of commuters from neighbouring districts.

### Housing and neighbourhoods

- The Council may wish to consider whether there are mechanisms it can use to encourage the development of new homes and neighbourhoods that align with what residents want and need to support their lifestyles.
- Detached homes and duplexes are favoured, with low uptake for higher-density options likely unless key features (privacy, outdoor space, secure parking) are addressed and prioritised.
- Safe, quiet neighbourhoods with character are top priorities for our residents, while dangerous driving, theft, and congestion in our neighbourhoods are key concerns.
- Development decisions are having both intended and unintended impacts on communities, highlighting the need for the Council to balance enabling housing growth and infrastructure provision with the long-term wellbeing of current and future residents and communities.

### Climate adaptation

- As the city adapts, the Council could consider its role in helping residents future-proof their properties, helping to reduce risk and build resilience to future events.
- The Council may need to consider how best to balance the need to adhere to guidelines and regulations (such as including hazard information on LIMs), with the need to inform communities about risk, while remaining mindful of potential impacts, including those related to property, insurance, and public confidence.
- There may be a community expectation that central and/or local government will provide financial assistance and support when private property is affected.

# Quality of life

## Living in Christchurch

80% of Christchurch residents rate their overall quality of life as good, very good, or extremely good. This is in line with the 8-city total.

77% agree the city is a great place to live and 59% agree that Christchurch city has a positive look and feel. Both of these are on the high end compared to the other cities surveyed.

Compared to the other cities surveyed, significantly more Christchurch residents feel their city has improved in the past 12 months (30% say it has become better). The most commonly mentioned reasons include: the vibrancy of our new CBD, a variety of recreational facilities/lots of things to do, building developments/renovations, and the area looks clean, tidy, and well kept.

Christchurch's high quality of life ratings (80%) reflects the success of the work the Council has done over the past 15 years, particularly in providing great public amenities, urban spaces, and community services. This is positioning Christchurch as a leader in liveability.

## City issues

Compared to the other 7 cities surveyed, a significantly higher proportion of Christchurch residents perceive the following city issues to be a problem in Christchurch:

- People begging in public places in the city to be an issue (77%)
- People sleeping rough in public places / vehicles to be an issue in their city (73%)
- Theft and burglary (72%)
- Alcohol / drug problems, or antisocial behaviours caused by alcohol / drugs, to be an issue (71%)
- Vandalism (67%).

In contrast, the following are issues that significantly fewer Christchurch residents believe to be issues in Christchurch.

- Safety in the central city during the day (10% feel unsafe)
- Limited parking in their local area to be a problem (38%)
- Noise pollution (32% say it is a problem during the day, 33% say it is a problem at night).

## Housing affordability

37% agree that housing costs are affordable in Christchurch. This is significantly higher than the 8-city total and is on par with Dunedin. This is a competitive advantage that the Council could leverage for attracting new residents and businesses to the city.

## What does this mean for the Council?

- Sustaining the momentum of being a great city to live in will require ongoing attention to the things that make Christchurch attractive and liveable.
- Managing the challenges that come with being New Zealand's second-largest city may call for thoughtful planning and collaboration with partner agencies and districts.
- Christchurch currently has some strong points of difference, but, as we continue to grow, it is likely we will experience more 'big city' hassles and challenges.
- As Christchurch continues to grow, the Council may need to consider how best to support the needs of a growing population while preserving the quality of life that residents currently value and enjoy.
- Christchurch residents are most concerned about social challenges, which are often complex issues that may benefit from strengthened partnerships between the Council and other partner agencies.

# Community outcomes monitoring

## About community outcomes:

We have four community outcomes underpinning the Long Term Plan 2024–2034 which capture what we aim to achieve for our community.

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

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

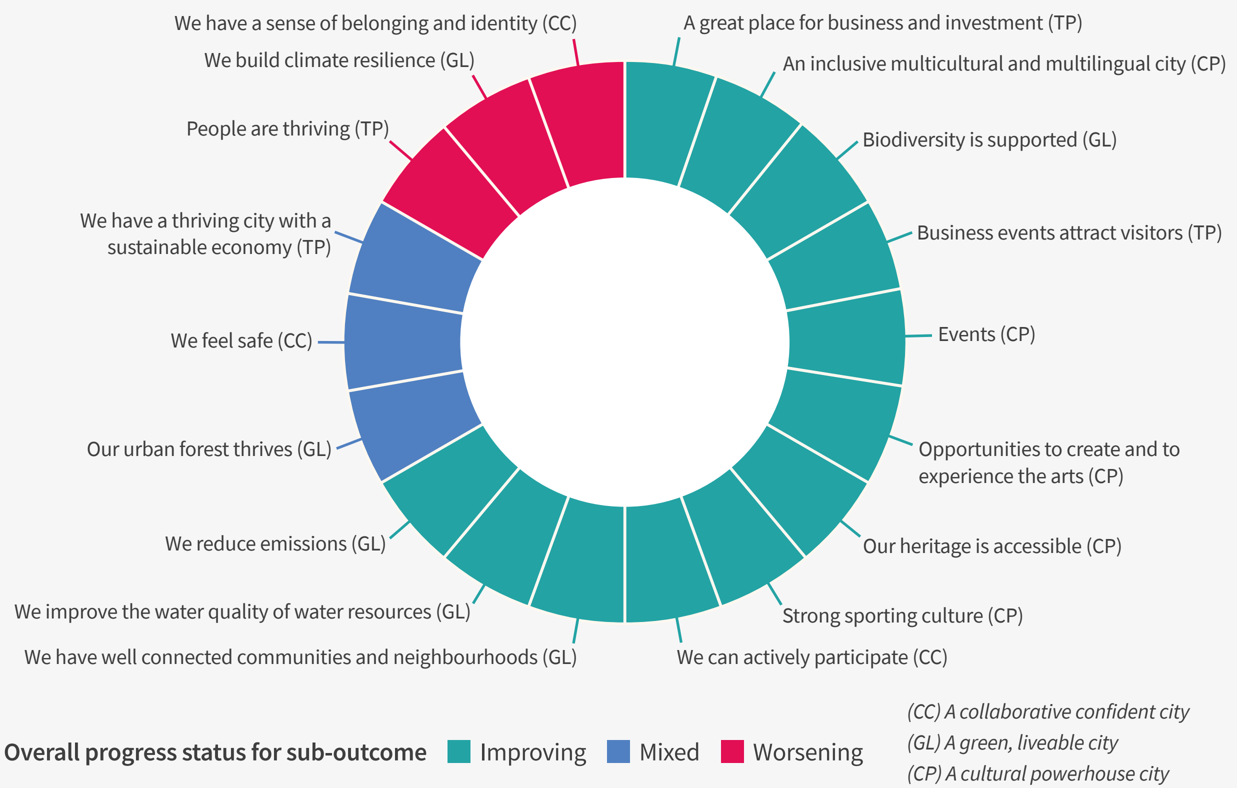
## Key indicator monitoring:

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.

Three out of the four outcomes had at least one sub-outcome in each category (improving, mixed, worsening). Cultural powerhouse was the only outcome that did not have a sub-outcome classed as worsening.

## How we are progressing towards achieving our community outcomes?




*(CC) A collaborative confident city*
*(GL) A green, liveable city*
*(CP) A cultural powerhouse city*
*(TP) A thriving prosperous city*

## 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 performance reporting at year end 24/2025, overall Level of Service delivery was over 85%.

For each outcome, at least 85% of LOS aligned to the delivery of the outcome met target

- A collaborative and confident city: 89% of LOS aligned to this outcome met target
- A green, liveable city: 85% of LOS aligned to this outcome met target
- A cultural powerhouse city: 96% of LOS aligned to this outcome met target
- A thriving prosperous city: 90% of LOS aligned to this outcome met target.

## What does this mean for the Council?

### Setting and reviewing community outcomes

- The Local Government Act (LGA) requires councils to set community outcomes that define what they aim to achieve for their communities.
- These need to be reviewed at least every six years, and are commonly reviewed with the Long Term Plan. It is suggested by Taituarā that when setting community outcomes councils reflect on whether the proposed community outcomes are council-centric or community centric.
- A key challenge moving forward will be ensuring that community outcomes continue to align with central government priorities and Council's strategic direction, while still reflecting what matters most to Christchurch residents.
- In 2023, through the 'What Matters Most' engagement, the community told us that the services they value most are:
  - Drinking water (83% of participants with an average score of 14 points)
  - Parks and gardens (78% of participants with an average score of 11.1 points)
  - Roads and footpaths (71% of participants with an average score of 12.8 points)
  - Responding to climate change (67% of participants with an average score of 16.2 points)
  - Travel choice (58% of participants with an average score of 11.7 points).

### Delivering towards community outcomes

Under the Local Government (Systems Improvement) Amendment Bill, the Council would be required to prioritise essential core services, such as infrastructure, transport, waste management, emergency preparedness, and economic development, which could potentially result in needing to scale back 'non-essential' projects and services that the community have told us are important to them.

- The Council will likely face an ongoing challenge in balancing the delivery of core services with the community's evolving wants and needs, particularly where these do not align with core services.
- Although achieving these outcomes often involves collaboration with communities and other organisations, the Council plays a central role through its service delivery. Any changes to services may affect progress towards one or more of the outcomes.

# Economic environment

Christchurch City's GDP per capita was $87,322 in March 2025, above the national average of $81,071.
(Infometrics)

The city's economy is diversified across health care, manufacturing, agriculture, construction, and tech. This has helped buffer global shocks like COVID-19 and geopolitical tensions.

The largest GDP growth contribution for 2025 was from rental, hiring, and real estate services, with continued strong growth contributions from the healthcare and social assistance, and education and training industries. These growth contributions continue to signal a resilient and diversified economy.

Rental, hiring and real estate services grew by 7.6% between 2024 and 2025.
(Infometrics)

Tourism added $1.53 billion to Christchurch's GDP in 2024, up 14.1%.
(Infometrics)

In August 2025, 64% of Canterbury businesses expected economic improvement within a year; 79% felt resilient to disruption.
(Business Canterbury)

The NEET (youth not in employment, education or training) rate dropped slightly to 11.8% in the year to March 2025, down from 11.9% in the prior twelve-month period.
(Infometrics)

Retail spending in Christchurch's central city (within the Four Avenues) declined by 1.5% in Q4 2025 compared to Q4 2024, with transaction volumes down 2.2%.
(Marketview)

## What does this mean for the Council?

- The Council may like to consider how Christchurch's current strengths (such as affordability, lifestyle, and infrastructure) could be strategically leveraged to retain and attract skilled workers and new businesses.
- Reduced Council spending may have broader economic implications for Christchurch, potentially affecting both local businesses and residents.
- While business confidence is high, consumer confidence remains sluggish, indicating ongoing financial pressure on households. This pressure is likely to shape community perceptions of Council decisions and contribute to tension between groups with differing views and aspirations.
- Policies that support household financial wellbeing could help stimulate broader economic activity.

# Social environment

89% of Life in Christchurch respondents say they have at least occasional positive interactions with others in their neighbourhood. (Life in Christchurch, 2024)

73% of residents belong to or participate in some sort of social network or group, on par with the 8-city total. (QoL 2024)

53% of Christchurch residents agree that a sense of community with the people in their neighbourhood is important to them and 40% say they experience it. This has decreased over time, from 70% and 50% respectively in 2020. (QoL 2024)

**64% of Christchurch residents are satisfied with their work-life balance.** (QoL 2024)

45% say they rarely/never felt lonely or isolated in the past 12 months, while 41% said sometimes, and 14% said most of or all the time. The proportion of respondents feeling lonely at least sometimes has been trending upwards since the first survey in 2002. (QoL 2024)

**27% have personally experienced discrimination/prejudice/intolerance in the last three months.** (QoL 2024)

The number of people doing unpaid work helping an organisation, group or marae has remained relatively stable at around 35,000, but as a proportion of the population has decreased from 14% in 2013 to 12% in 2023. (Census, 2023)

## What does this mean for the Council?

- A declining emphasis on neighbourhood level community connection among Christchurch residents suggests shifting social values. This trend may be influenced by factors such as housing intensification, greater population mobility, or broader social fragmentation. For Council, this highlights the need to consider how urban planning, community programmes, and city-shaping decisions can better support social connection and foster community cohesion as Christchurch continues to grow and change.
- It is worth the Council considering the important role that strong community connections have played in helping Christchurch navigate challenging times over the past 15 years. If fewer people feel that being connected to those around them matters, it may signal a weakening of the social ties that support collective resilience and wellbeing when pressures or crises arise.
- The Council may wish to explore ways to support and nurture active community connections across Christchurch's diverse neighbourhoods and communities.
- The Council supports a range of community-focused organisations and social enterprises, providing around $9 million annually through the Strengthening Communities Fund to help improve Christchurch's economic, social, and cultural wellbeing. The organisations who receive this funding bring specialised expertise and strong local connections, which enables them to deliver targeted services, events, and activities that enhance residents' quality of life, often more cost-effectively than if the Council delivered them directly.

# Cultural environment

Christchurch is changing. We're becoming more diverse, more creative, and more connected to the cultures and communities that make Christchurch unique and special.

**Our Māori population is increasing. Currently, 12.7% of our population is of Māori descent, compared with 11.5% in 2018, and 10.6% in 2013.**

**41% of residents surveyed agree that the Council honours the principles of the Treaty of Waitangi, up from 37% in 2023.**

There are six local Pāpatipū Rūnanga (marae-based communities that are part of the wider Ngāi Tahu Iwi) within the Christchurch City Council Area:

- Te Rūnanga o Wairewa
- Te Ngāti Tūāhuriri Rūnanga
- Te Rūnanga o Koukourārata
- Te Taumutu Rūnanga
- Te Hapū o Ngāti Wheke
- Ōnuku Rūnanga.

In 2024, just over three quarters (77%) of the annual population growth was from people moving to the city, from either overseas or elsewhere in New Zealand. The areas of the city with the highest proportion of overseas-born migrants include Wigram (almost half of residents, at 48%), Riccarton, Central City, Upper Riccarton and Sockburn.

One third of overseas-born residents originated from SE or NE Asia, and one quarter were born in NW Europe.

**80% of respondents believe cultural diversity makes our city a better place to live.** (LiC, 2021)

**Over two thirds of respondents felt that people in Christchurch accepted and valued them and others of their identity, while 7% disagreed.**
(QoL, 2024)

75% of respondents agree that they can participate in, perform, or attend activities / groups that align with their culture. (QoL, 2024)

**Arts and creativity are important reasons why respondents enjoy living in Christchurch. 76% of respondents believe the arts make Christchurch a liveable city.** (LiC, 2021)

Christchurch City is the 8th most creative territorial authority based upon 4.06% of the workforce being employed in the creative sector in 2024. (Infometrics, 2025)

**Hagley Park (93%), the Botanic Gardens (95%), and our heritage gardens and parks (79%) contribute greatly to our 'garden city' image** (LiC, 2025) **and are amenities that residents are consistently highly satisfied with.** (Residents Survey, 2024-2025)

**Migration and demographic shifts are reshaping the city's identity and needs.**

More of our residents and communities are feeling included and valued in Christchurch and feel that they are able to express their culture.

## What does this mean for the Council?

- Maintaining strong relationships with Ngāi Tahu and other iwi, especially in areas like environmental stewardship, cultural understanding, and long-term resilience, plays an important role in continuing to honour and engage with Te Tiriti o Waitangi in our work.
- As Christchurch becomes more culturally diverse, the Council may wish to look for opportunities to ensure all communities feel heard, understood, and supported in planning and decision-making.

# Natural environment

Council has a target to have net zero greenhouse gas emissions by 2045, with at least a 50% reduction in methane emissions by 2045.

Our average temperature is expected to increase by 0.8°C – 1.4°C by 2050.

We currently experience on average 20 hot days over 25°C each year, this could double by 2050, with drier summers and autumns.

In the year to March 2023, the annual average air quality ($PM_{10}$) in Christchurch City was worse than in New Zealand (13.8). (Infometrics)

We expect to continue to get a lot of windy days, wind speeds could increase up to 2% by 2050 and we could see more hot, dry winds from the northwest.

**91% of our swimming sites are safe for swimming, while 70% of our local rivers and lakes have seen improved water quality over the last 10 years.** (Infometrics, 2024)

**Sea-level rise is projected to increase by 14 to 23cm between 2020 and 2050.**

We're expecting more intense and heavier rain, with an increase of 15-40% more rain during the winter months.

Vertical Land Movement is expected to disproportionately impact different parts of our coast. Brighton spit is expected to sink at a rate of -7.5mm/year, whereas Waimairi Beach and Lyttelton Harbour are expected to sink at –4mm/year.

18% of respondents agree we are doing enough to prepare for the local impacts of climate change.

- 68% of respondents feel a sense of responsibility for climate change, this feeling is particularly prominent among both women and younger respondents. (LiC 2024)

Compared to the 8-city total excluding Christchurch, residents in Christchurch are more likely to perceive the following natural environment concerns to have been a problem in the city the past 12 months (QoL 2024):

- Water pollution (73%)
- Increased heat and fire risk (69%)
- Air pollution (56%)
- Not enough water (42%).

Life in Christchurch feedback shows residents are most concerned about rising insurance costs (61%), staying in their homes during/after extreme weather (41%), and potential infrastructure damage (41%).

In 2019 the Council declared a Climate and Ecological Emergency and in 2021, adopted the Ōtautahi Christchurch Climate Resilience Strategy, a blueprint for collective action, outlining four core goals and committing to setting up a programme of work to achieve these:

- Net Zero Emissions Christchurch
- Understanding and preparing for the ongoing impacts of climate change
- A just transition to an innovative low-emission economy
- Acting as guardians of our natural environment and taonga

## What does this mean for the Council?

- Council has a key role to play in strengthening our city's resilience to the impacts of climate change. This includes proactive management of and reducing the long-term costs and impacts of extreme weather events. It also means supporting the places, relationships, and networks that enable communities to adapt, recover, and thrive.
- Over the next 30 years, 28% of Council's roads costing $1.2 billion, 54% of Council's three waters pump stations costing $346 million, and 26% of residential buildings in the district costing $11.4 billion are projected to be exposed to hazards caused by too much water (coastal, fluvial and groundwater flooding). In many cases the risk is already present, and we could see significant damage in a large event.
- Impacts to infrastructure may include damage and temporary loss of access or function to homes, infrastructure, and public spaces. In particular, some coastal and low-lying areas are facing chronic flooding, infrastructure degradation, risks to water security and community wellbeing.
- Canterbury's natural landscapes are vital to the region's tourism economy. Protecting these environments supports both long-term ecological health and the sustainability of the tourism sector. This calls for balanced, responsible management that considers both environmental and economic outcomes.

# Business and economy

Christchurch's central city has rebounded strongly post-earthquake, with GDP growth outpacing the wider city, employment nearly fully recovered, and land use becoming more efficient, indicating both resilience and ongoing transformation.

**Central City GDP measured $7.9238 billion in the year to March 2024, up 7.1% from a year earlier which compares with the wider Christchurch City GDP growth figure of 1.7%.**

In real terms, GDP recovered to pre-earthquake levels after 2022. As a share of total Christchurch City GDP, the central city contributed 22.5% in 2024. That compares with a level of about 30% observed prior to 2011. (Infometrics)

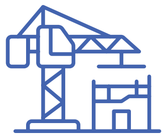
Business and employee counts show the sharp economic contraction in the central city after the earthquakes, with the number of businesses dropping from 6,138 in 2009 to 3,729 in 2012, and employee numbers falling from 51,700 to 28,800. Since then, recovery has been steady, with 2024 figures showing 5,145 businesses operating in the central city and 50,390 employees.

While employment has almost recovered to pre-quake levels, the number of businesses – while increasing – is around 86% of pre-quake levels. In 2009, each central city business had an average of 8.4 employees. This ratio has continued to grow post-quake, reaching 9.8 employees per business in 2024.

The Professional Services and Health Care sectors are the largest, making up 40% of all central city employment and increasing by over 1,000 in the year to February 2024.

**15% of central city workers commute from neighbouring Selwyn or Waimakariri districts.**

The central city holds an 18% share of Christchurch's total spending – in line with the Council's long-term ambition set in 2019. This has fallen slightly from 19-20% in the previous year.



**Following the 2010–2011 earthquakes, 826 commercial buildings were demolished in the central city. Since then, 222 new commercial buildings have been consented, adding over 544,000 m² of new commercial floorspace in the central city.**

Post-earthquake redevelopment in Christchurch's central city has led to significantly more intensive and efficient use of land. Across several examples, developments now have on average 117% more floorspace, highlighting both the more efficient use of land and the untapped potential of remaining vacant sites, along with the infrastructure demand that further growth may generate.

Since 2006, the Council has supported the Central City Business Association (CCBA) as a collective voice for the business community. Since 2020, it's been funded through a targeted rate ($500 per property in 2025). At a regional level, Business Canterbury also contributes insights on the central city's role in the wider city and regional economy.

**Strong public investment in key facilities (Te Pae Christchurch Convention Centre, Parakiore Recreation and Sport Centre, and One New Zealand Stadium at Te Kaha) are boosting economic growth in the central city and providing new opportunities for community events and connection.**

Pre-election-Report-2025.pdf

**Revitalising the central city has been a focus for the Council since the late 1990s. Post earthquake renewal has delivered places and spaces that add new vitality and has transformed the central city's appeal.**

## What does this mean for the Council?

- Renewed direction, supported by a coordinated programme of investment, could send a strong signal to private investors and businesses. A continued focus on the central city would likely help boost economic and social activity, leverage the upgraded transport network, create jobs, unlock growth and innovation, and enhance the city as a place to live. (Tracking the progress of our Central City : Christchurch City Council)
- Building on this, the next phase of regeneration might focus on enabling the private sector to fully leverage recent infrastructure investments, such as major facilities, by encouraging increased visitation, supporting new business activity, and fostering employment opportunities.
- A range of entities have played a part in the economic recovery of the central city since 2011. Stakeholder feedback and reviews have pointed to confusion around roles and direction. Ensuring that there is alignment and clarity of economic development functions, including the core direction of Christchurch's economic development priorities, could help to improve business and investor confidence in both the central city and the city more broadly.

# Residents and visitors

In 2024, the central city population was estimated at 9,160, recovering to its pre-quake population level in 2023.

**The central city now accounts for 2.2% of Christchurch's total population, matching its pre-quake share.**

As of June 2025, 260 new homes were delivered in the past year, bringing the total to 5,305 dwellings in the central city. An additional 400 dwellings were under construction and 166 homes had been consented.

Since 2018, housing delivery has accelerated, though developer hesitancy driven by rising infrastructure costs, market volatility, and regulatory complexity, has slowed expected progress towards meeting this target.

**Home ownership in the central city is low at 29%, among the lowest rates in Christchurch.**

On census night, nearly 600 dwellings (11%) were unoccupied, many likely used for short-term visitor accommodation.

Nearly 60% of central city residents are aged 15–39 years, compared to 37% citywide.

Christchurch remains a key hub for South Island travel, with strong visitor demand. Overseas visitor arrivals at Christchurch Airport rose 13% in the year to June 2025, peaking in Dec/Jan 2025.

**Visitor spending accounts for 25% of central city electronic card spending, totalling approximately $310 million in the year to June 2025. Visitor spending is seasonally skewed, peaking between September and March, especially among international visitors.** (Marketview)

In 2025, 82% of Life in Christchurch respondents had visited the central city for non-work/education purposes in the past month.

Pride in the central city rose to 59% in 2025, up from 47% in 2022. Top contributors to pride include:

- Christchurch Botanic Gardens (94%)
- Margaret Mahy Playground (78%)
- Parks and natural environment (78%)
- Tūranga Library (78%)
- Other attractions (e.g., Art Gallery, Museum, Arts Centre) (74%).

65% agree the central city offers diverse activities and community spaces.

82% feel safe in the central city during the daytime. 49% feel unsafe after dark, a steady increase from 32% in 2020.

The CCBA Safety Team responded to 2,532 incidents over two years ending June 2025, with 2024/25 incidents down 43.8% from the previous year.

Between August 2024 and July 2025, 210 victimisations occurred within the Four Avenues during Saturday 10pm–Sunday 4am. In Cathedral Square, 60% of violent/sexual assaults occurred between 6pm–6am, with two-thirds on Friday and Saturday nights.

## What does this mean for the Council?

- Council's long-term planning recognised early on that growing the central city's resident population would boost vibrancy. A permanent population brings life to streets, supports venues and facilities, and creates a local customer base. In 2018, Council set a goal to reach 20,000 residents by 2028, launching a housing growth programme to support it.
- The central city's residential pipeline is strong, supported by operative planning changes enabling taller, denser development, and growing confidence among developers and buyers driven by easing interest rates, steady migration, and visible progress on One New Zealand Stadium at Te Kaha and Parakiore Recreation and Sport Centre.
- Key housing challenges in the central city include a need to diversify housing to match lifestyle needs and preferences, managing the rise in short-term visitor accommodation, and ensuring affordability and community connection, especially for young people we want to attract and retain.
- In the coming years, overseas visitation is likely to be shaped by fewer cruise ship arrivals, growing seasonal airline capacity, and the potential of major venues to attract year-round events, each influencing how and when visitors engage with the central city.

# Built environment

**The central city's infrastructure and streetscape projects continue to progress, and remaining anchor projects are nearing completion.**

Across all modes of transport, 55% of residents find it easy to travel to the central city, and 40% find it easy to travel within the central city.

- 81% of pedestrians find it easy to get about in the central city
- 48% of drivers find it easy to get into the central city, although when within the central city only 27% agree it is easy to get around.
- 77% of those traveling to the central city by bicycle find it easy, and 75% find it easy once there.
- Public transport users find it easy to travel to the city (81%) but less so within the city (59%). (LIC Central City 2025)

In the first six months of 2025, average footfall was 6% higher than the same period last year, with a counter near the Bridge of Remembrance tracking ~500,000 pedestrians in January 2025 (avg. 16,000 a day).

**An average of 1,200 cyclists a day passed through the Cambridge Terrace Bridge cycle counter.**

The Council operates 82 bus stops within the central city, including the main bus interchange for the city.

Perceptions of the central city's physical regeneration are positive according to the February 2025 Life in Christchurch surveys.

- 64% were satisfied with the look and feel of the streetscape and public artworks in the central city.
- 62% were satisfied with the look and feel of new buildings in the central city.
- 61% were satisfied with the look and feel of the landscaping and tree planting in the central city.
- 62% also agree that the central city has attractive and inviting open and green spaces.

Derelict buildings and vacant land have been a key focus in efforts to improve perceptions of the central city. Since 2016, over 50 sites have been resolved through repair, conversion, or demolition (including several heritage properties supported by Council grants).

**Twelve properties remain on the Barrier Sites list, with three lacking clear plans.**

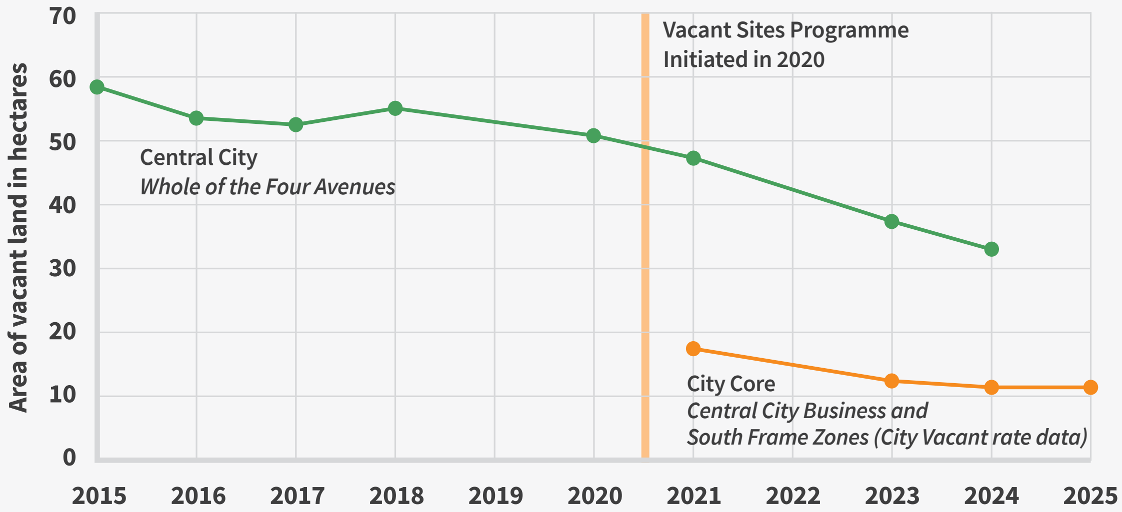
Vacant land in the central city has halved since 2015, but around 15 hectares remain available for future growth. Since 2022, Council has incentivised owners to maintain sites in good condition, with nearly 75% meeting this standard by June 2025, qualifying for a City Vacant rate exemption or remission.

The latest Ground Floor Activity Survey shows around 1 in 5 shop frontages in key commercial areas remain vacant, with most active frontages concentrated around Cashel Mall.

Vacancy of commercial premises in the central city has been trending lower since 2018 with data in 2023/24 showing vacancy below 4%. The reintroduction of 14,000sqm of space in the former IRD building on Cashel St. (adj. Te Kaha) into the market last year added to supply and other buildings are under development. (CBRE, 2025)

A current challenge in the central city is that most commercial space (around 90%) is high-value Grade A and B due to the newness of the building stock. While refurbished properties like 159 Hereford Street offer some lower-grade options, there are perceptions that affordable workspace is limited within the CBD. This may impact efforts to attract a diverse range of businesses and services to the central city.

**Change in the area of vacant central city land** (2015–2025)

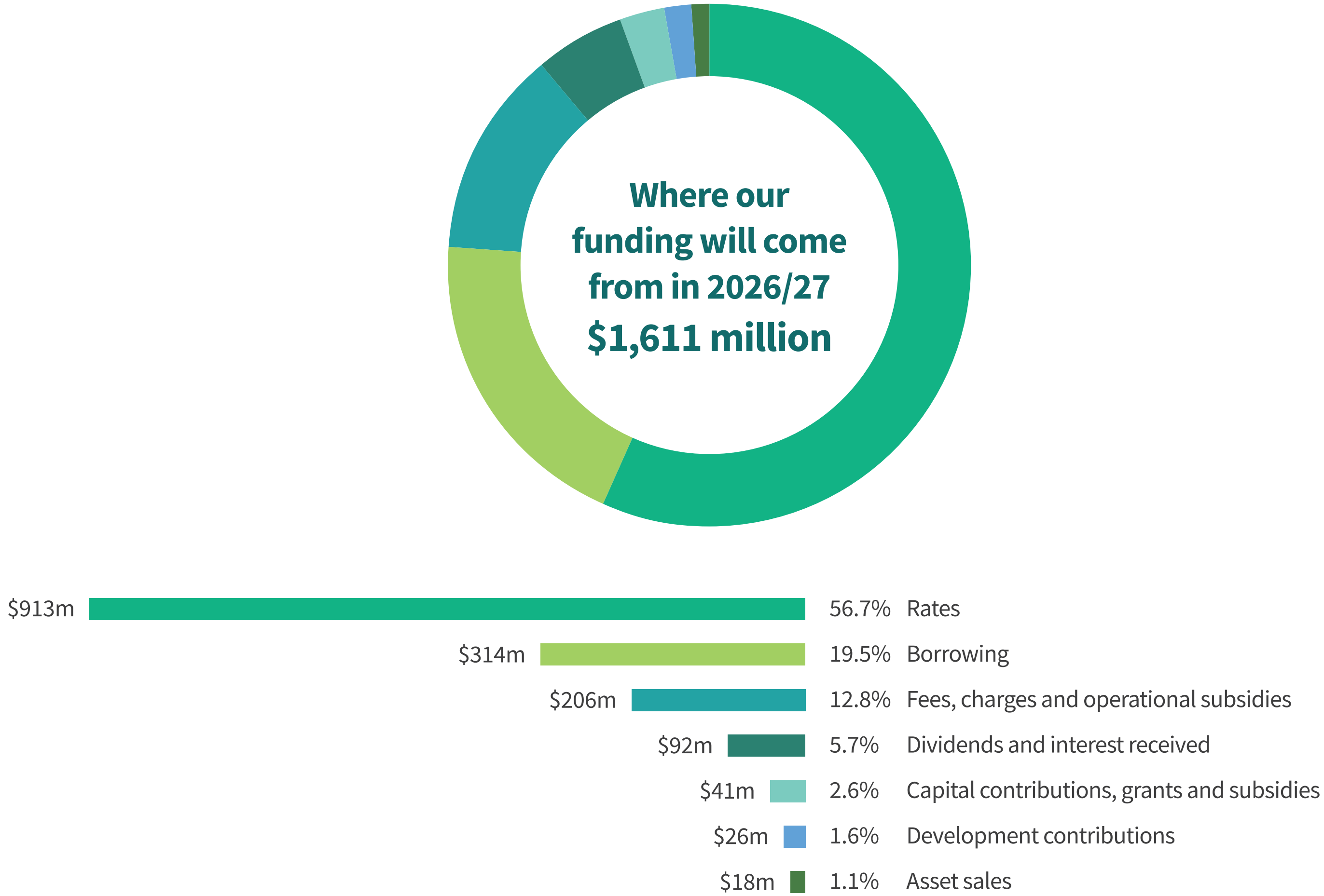



## What does this mean for the Council?

- While perceptions of the built environment are generally positive, ongoing attention to derelict buildings, vacant sites, and under-activated shop frontages will remain important for maintaining confidence in the city's regeneration.
- Council's innovative City Vacant rate has successfully incentivised better upkeep of vacant land in the central city, improving the appearance of many prominent central city sites. These enhancements complement public and private investment and is reflected in the positive feedback provided about the central city in recent surveys.
- Derelict buildings continue to cause localised issues across the city, and current legislation offers limited tools unless buildings are deemed dangerous or insanitary. It may be useful for the Council to reflect on whether there are additional tools or advocacy avenues that could help address derelict buildings, especially given current legislative constraints.
- The commercial property market is dominated by high-value spaces, which may limit diversity. The Council may wish to consider how it could encourage a more balanced commercial property mix, which could attract innovation, entrepreneurship, and a broader range of business activity in the central city.
- Movement within the central city remains challenging for some modes, especially drivers and bus users, suggesting a need to look at how street design, circulation, and wayfinding can best support ease of movement in the central city.

# Sources of funding

Our main source of revenue is property-based rates, supplemented with funding from fees and charges, Government subsidies, development contributions, interest and dividends from subsidiaries.



The current LTP projects annual rates levied to increase to $1.216 billion by 2033/34. As a proportion of funding, this equates to approximately 66%, compared to the current 49% (LTP 2024–2034).

We also own shares of major local companies through our wholly owned subsidiary Christchurch City Holdings Limited (CCHL) which return dividends to the Council:

- Christchurch International Airport
- Citycare
- Lyttelton Port Company
- Orion
- Eco Central
- Enable Services.

Funding for our capital programme comes from:

- Crown recoveries
- Subsidies and grants for capital expenditure
- Development contributions
- The proceeds of asset sales
- Debt.

## What does this mean for the Council?

- Council faces growing expectations from both Central Government and local communities, with limited resources to respond.
- Current funding pressures are compounded by inflation, rising costs, skills shortages, supply-chain constraints, and longer-term climate impacts, all of which reduce Council's capacity to meet increasing expectations from communities and Central Government.
- Amid proposed rates caps and mounting infrastructure deficits, Local Government New Zealand and financial analysts are also urging councils to explore alternative funding mechanisms, as the current reliance on property rates is proving inadequate to meet rising service demands and unfunded mandates from Central Government.

# Cost of doing business

Local government is facing growing public expectations, tight budgets, and growing demands for transparency. We must not only account for every ratepayer dollar but also demonstrate that spending delivers value for money.

**Councils primarily fund services through property rates, but there is growing discussion about whether this model remains sufficient. Calls are growing for alternative funding mechanisms, such as GST sharing, infrastructure funds, and regional deals.**

The Council assumes a long-term neutral official cash rate of ~3.0% (about 1% above expected CPI).

Our borrowing costs aren't directly tied to the official cash rate. We hedge interest rate risk, similar to fixing portions of a mortgage over 1, 3, or 5 years.

Including credit margins and hedging costs, Council's borrowing rate is expected to average 4.9–5.0% over the LTP period.

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)

Interest payments by councils in New Zealand topped $1.3 billion in the September 2023 year, up 64% on pre-pandemic payments. That means that interest payments make up almost 9% of local government's operating expenditure. (Infometrics, 2024)

Labour costs for local government in the year to 2023 accounted for approximately one fifth of annual operating expenses. (Infometrics, 2024)

The average wage in the Public Service has grown by an average of 3.7% per annum since records began in 2000. (Public Service Commission)

**There is rising demand from the community for services, funding, and infrastructure amid pressure to keep rates affordable.**

## What does this mean for the Council?

- The Council is facing the challenge of balancing rising service and infrastructure demands with constrained revenue streams, especially as scrutiny of property rates intensifies.
- The sort of things that Councils need to spend money on (especially infrastructure and staff costs) are likely to continue growing faster than CPI inflation over the LTP period.
- Our main investment income comes from dividends, primarily through Christchurch City Holdings Ltd. As a net borrower, we only hold cash investments (like term deposits) short-term to manage liquidity.
- Credit margins (the premium investors require over government rates) also affect our costs. While still relatively low, they've risen in recent years and are likely to stay elevated due to global risk perceptions.

# Local Government cost indicators

Local government cost pressures are easing from the rapid growth of 2021–2023 but remain above pre-COVID levels. While inflation may stabilise, councils should remain vigilant for potential cost shocks and ongoing volatility.

The latest Local Government Cost Index (LGCI) projects annual cost increases of around 3% through to 2035, amounting to a cumulative rise of nearly 30% over ten years.

BERL (Business and Economic Research Limited) advises councils to prepare for volatility and sudden cost spikes, particularly those driven by global events.

Key inflation drivers include global supply chain disruptions, geopolitical tensions, domestic fiscal and monetary policy, construction sector pressures, and rising insurance costs.

### About the Local Government cost indicators:

- The Local Government Cost Index (LGCI) helps councils forecast cost increases over the next decade. It's a tailored inflation measure showing how much more expensive it will be to deliver services and infrastructure.
- The LGCI is built by tracking prices of goods and services councils regularly purchase, weighted according to actual council spending. It uses economic data and forecasting models to project cost changes over ten years.
- Unlike the Consumer Price Index (CPI), which tracks household expenses like groceries and rent, the LGCI focuses on council-relevant costs, such as staff wages, construction materials, and infrastructure maintenance.
- In 2025, the index was reweighted to reflect updated spending patterns, replacing the previous 2015 weights.

## What does this mean for the Council?

- Given ongoing global economic uncertainty (see Global Economy), the Council may wish to consider how best to prepare for and mitigate the risks of continued cost volatility and reduced predictability in local government cost inflation.
- While inflation has normalised for producer, capital and labour costs, the cost increases since 2021 have not been reversed, therefore Councils face permanent increases in producer, capital and labour costs.
- We are operating in a dynamic environment where conditions can shift rapidly. While these indicators are updated annually and provide valuable long-term insights, they may not always capture more recent developments.
- BERL recommends that Councils should remain vigilant and prepared for unexpected cost pressures that may arise over the course of the Long Term Plan. Unexpected pressures could have a material impact on council finances.

# Capital programme challenges

In recent years, the cost of delivering capital goods has risen significantly, with increases compounding over time. Although the rate of growth has slowed, prices continue to rise, and earlier increases have not been reversed. As a result, even if Council is investing the same dollar value in capital works as in previous years, rising costs mean we're likely delivering less total work overall.

As of June 2025, the Te Waihanga Pipeline tracked over 9,200 infrastructure initiatives worth $125.1 billion across New Zealand, with $15.2 billion expected to be in procurement by mid-2026, intensifying competition for contractors, materials, and skills. (Te Waihanga Pipeline Snapshot, June 2025)

**Over 2,500 infrastructure initiatives worth $52.8 billion are currently under construction nationwide, with $10.2 billion in spending forecast across the second half of 2025 and into 2026.** (Te Waihanga Pipeline Snapshot, June 2025)

The cost of civil construction rose by 1.2% in the year to March 2025, while non-residential building construction increased by 1.8%. Overall, capital goods prices across all asset groups rose by 1.6% over the same period, reflecting continuing modest growth in construction and infrastructure costs. (StatsNZ, Capital Goods Price Index)

The Annual Plan 2025/26 highlights $6.5 million in inflationary pressures beyond Long Term Plan forecasts and an additional $4.1 million in operating costs from new capital projects.

Council's capital delivery in 2024/25 was $480 million (86.7% of budget) excluding One New Zealand Stadium at Te Kaha, with the value of future programmes increasing significantly; Council may like to consider a rephased plan to improve deliverability and assess options for realising procurement savings.

Structural issues like skills shortages, long procurement lead-times, and limited tender responses further constrain project initiation and execution. Nationally, job losses in construction are notable, with filled roles down 5.1% in the past year. Labour outflow to Australia could exacerbate skill shortages if demand in the construction sector rebounds.

## What does this mean for the Council?

- 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.
- Rising construction costs, strong national demand, and climate-related adaptation requirements mean the same level of funding will buy less work over time. Council may wish to consider the pacing, prioritisation, and scope of its capital programme.
- Hazards such as sea-level rise, groundwater rise, and more frequent extreme weather will likely drive higher renewals and resilience costs.

# Council service delivery

The Long Term Plan sets the direction for all the activities and services the Council provides, and what level of service will be provided.

### Council activities

The Council delivers both asset-based services (e.g. water, wastewater, stormwater, roads, parks, and facilities like libraries and museums) and programme-based services (e.g. events, community support, and regulatory functions).

### Levels of service and performance targets

Each activity has defined levels of service with performance measures and targets, set through the Long Term Plan (LTP) to align with Council's strategic outcomes.

### Balancing expectations and feasibility

Setting service targets involves balancing community expectations with what is realistically achievable within budget and operational constraints.

### Purpose of levels of service

These levels help assess service delivery across dimensions like quantity, quality, efficiency, and customer satisfaction.

### Impact on costs and contracts

Changes to service levels don't always affect rates directly but may have financial implications if they require renegotiating long-term contracts.

### Regulatory functions

Many regulatory services are governed by central government timeframes and are funded through fees and charges rather than rates.

## What does this mean for the Council?

- The Council may need to consider how to best balance community expectations with what is realistically sustainable. Different groups value services differently, meaning that decisions on funding, prioritisation, or reductions will require clear justification and communication.
- Residents often have differing views about which services are "core" and which are optional. The Council will need to consider how to clearly define and communicate which services are essential, what is required by legislation, and where there is flexibility to adjust levels of service.
- With cost pressures increasing for both households and the organisation, reviewing levels of service often becomes a key tool for managing affordability. Decisions may require trade-offs between service performance, community expectations, and available funding. Recent experience shows that proposals to reduce service levels, especially in visible or well-used areas, can trigger strong community opposition.
- With upcoming local government reforms, the Council may wish to reflect on its services, considering what is core, what is legislatively required, and what residents genuinely value and expect. Some services are driven by central government timeframes or mandates. The Council must continue to meet these obligations regardless of budget pressures and ensure any changes are consistent with the Local Government Act and other legislation.
- Changes to service levels can have financial or operational impacts, particularly where contractors are involved or long-term agreements are in place. Adjustments may require renegotiation or incur transition costs.
- Any significant proposed change to levels of service requires meaningful consultation. This ensures decisions reflect community input and meet statutory engagement requirements.

# Affordability

In 2025, the average house value in Christchurch City was 6.4 times the average household income, making housing in Christchurch slightly more affordable than the national average of 6.5.

(Infometrics, 2025)

The average household income in Christchurch City is $116,923. (Infometrics, 2025)

**Household income growth for the city was 0.2% in the year to March 2025, lower than national growth of 1.8%.** (Infometrics, 2025)

In Christchurch City the average house value is 6.4 times its average household income, and the average weekly rent accounts for 22.9% of the average household income in 2025 (Infometrics, 2025). This means many residents, especially those on fixed or low incomes, are facing mounting financial pressure. This is reflected in falling perceptions of affordability and an increasing number of ratepayers in rates arrears.

In Christchurch City there were 31,863 people on beneficiary support in 2025.

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.

In 2024, 37% of Quality of Life survey respondents agreed that their housing costs are affordable. While this is higher than the 8-city total average (32%), it is down from 46% in 2022.

28% of Life in Christchurch respondents told us that they think housing affordability will impact their ability to continue to live in Christchurch in the long term; 40% did not think that it would have an impact. (Life in Christchurch 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.**

In recent years, an average of 64% of newly consented homes have been multi-unit dwellings.

## What does this mean for the Council?

- With household incomes growing slowly relative to living costs, more residents (particularly those on low or fixed incomes) are experiencing financial strain. This may mean that the Council will face stronger scrutiny over rates increases, fees, and charges, and heightened expectations to demonstrate value for money.
- Rising arrears indicate that more households are struggling to pay rates on time. The Council may need to consider how it manages debt recovery, supports vulnerable ratepayers, and ensures revenue stability without exacerbating hardship. More households experiencing hardship could increase demand for rates remissions, postponements, or other support.
- Renters and lower income households are more exposed to cost of living pressures. Any changes to rates, fees, or service levels may disproportionately affect these groups, making equity an important consideration in financial and strategic decisions.
- 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.
- With a growing share of new homes being multi-unit dwellings, demand will shift toward services supporting higher-density living, such as local parks, transport, waste management solutions, and neighbourhood amenities. This may also change the pattern of rates revenue recovery and capital funding needs.
- A move away from standalone housing toward smaller units may impact future development contributions, infrastructure funding, and asset planning. Council will likely need to adjust strategic planning to reflect these evolving development patterns.

# People, capacity and capability

Between 2018 and 2023, the share of New Zealanders employed in professional occupations rose from 23% to 27%, while proportions declined in labouring (11% to 9%), sales (9.2% to 7.8%), and community and personal service roles (9.5% to 9.0%), reflecting a broader shift toward higher-skilled employment amid pandemic-driven demand and structural workforce changes. (StatsNZ, 2023)

The average age in the Public Service has remained relatively stable since 2020, hovering around the 44.0 year mark, with the 2025 result of 44.6 years. (Age profile - Te Kawa Mataaho Public Service Commission)

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)

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.

**Central government in New Zealand has made a clear commitment to reducing spending on consultants and contractors and building more in-house capacity.**

Privatising and consolidating council functions like building consenting marks a shift from the traditional model, reducing regulatory risk for councils but heightening competition for skilled workers in a tight area of the labour market.

A global EY survey of 15,000 people across 15 countries, including New Zealand, found that 82% had used AI in the previous six months. Despite this, scepticism remains; New Zealand scored just 52 on the EY AI Sentiment Index, placing it in the ‘neutral’ category. (Transform human potential in an AI world | EY - New Zealand)

Public sentiment toward AI in professional services is marked by curiosity, but hesitancy. Meaningful cost reductions and productivity gains from AI are likely to require significant investment, not just in technology, but also in capability, trust, and change management.

Moving to digital services can help organisations work more efficiently and deliver better results. But to get the most out of it, the focus should be on creating value and building useful skills, not just cutting costs. Deloitte notes that while digital tools can drive growth and efficiency, this requires a coherent strategy and strategic investment.

**In response to rapid technological advances and unpredictable global events, flexible ways of working are a strong trend in the global labour market, as workplace models slowly become ‘boundaryless’. Research suggests that in response, organisations can focus on human sustainability to build better human and business outcomes, “a mutually reinforcing cycle”.** (Deloitte 2024 Global Human Capital Trends)

## 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 rise in professional roles nationally suggests a growing pool of skilled workers. Christchurch's relative attractiveness positions the Council well to actively recruit talent, especially as other cities face shortages.
- Recent restructures and reforms across the public sector have led to a growing pool of skilled professionals competing for a limited number of roles, intensifying competition and reshaping the public service job market.
- However, 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.
- Central government's commitment to reducing consultant and contractor spending may lead to similar expectations for councils, while also limiting access to private sector expertise needed for specialist support.
- A change of government in New Zealand this 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.
- Rising union membership increases the risk of industrial action, making proactive staff engagement and contingency planning essential to ensure service continuity and manage reputational risk.
- 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. When these relationships are strong, councils are better positioned to negotiate with unions, navigate change, implement reforms smoothly, and maintain service continuity. Proactive engagement, transparency, and mutual respect play an important role in fostering trust and collaboration, ultimately benefiting both employees and the communities they serve.
- AI is increasingly used across business and personal contexts in New Zealand and globally. When seen as a tool to amplify human potential, AI can transform how we work, though education and trust are key to successful adoption. AI is a generational opportunity for productivity and innovation, but it also presents risks due to its complexity and lack of transparency. (Transform human potential in an AI world | EY - New Zealand)
- AI and digital technologies offer the Council an opportunity to enhance productivity and service delivery. But success will depend on strategic investment in skills, trust, and change management, not just technology.

# Insurance

Council has $2.4 billion of cover over 2,000 above ground assets and $580 million of cover over underground infrastructure assets.

Council, in partnership with its broker, developed a five-year insurance strategy to guide risk-based decision-making. The strategy aims to:

- improve confidence in risk profiling and transfer
- ensure adequate understanding of policy coverage
- review professional indemnity risk and required insurance profile
- better understand the options we have to manage the premium v coverage equation
- understand medium to long-term climate change, sustainability, and Environmental, Social, and Governance (ESG) impacts on sourcing insurance capacity

Improved understanding of Council's asset risks has helped attract cover in a tight market, particularly for underground assets, where better data has led to increased underwriting. It has differentiated us from others seeking capacity in a constrained market.

Looking ahead, Council may complement traditional insurance with alternative risk transfer options such as parametric cover and captive insurance.

## What does this mean for the Council?

- Global insurance capacity is under strain, with potential shrinkage or consolidation, particularly for catastrophe cover. Additional natural disasters could further limit available capacity.
- Climate change is disrupting traditional risk models, especially for weather-related events, prompting insurers to rebuild pricing assumptions. Insurers are increasingly assessing risks at the individual property level, factoring in more hazards. This is likely to lead to tighter policy conditions and higher premiums in some areas.
- Insurers now expect higher self-retention levels for catastrophe risks, shifting more financial burden onto policyholders.
- Inflation continues to push up asset reinstatement costs, contributing to rising premiums.
- Government reforms are expected, but details remain unclear, adding uncertainty to future risk management strategies.
- All Council assets are concentrated in an earthquake-prone region, heightening exposure to natural catastrophe risk. Council's growing capital programme is expected to drive further increases in asset values, raising insurance costs and straining market capacity.
- Liability and professional indemnity risks for councils are worsening nationwide, with rising potential for class actions. Councils often bear disproportionate costs under joint and several liability, increasing financial exposure.

# Trust in governance and decision making

**On average, 32% of Christchurch residents agree that the Council has a good reputation and can be trusted.** (GSS, 2025)

35% of residents are satisfied with the leadership of the Mayor and Councillors. (GSS, 2025)

**35% of residents agree that the Council acts with integrity and honesty.** (GSS, 2025)

38% of residents agree that Council makes decisions in the best interest of the city which is higher than the 8-city total and an improvement when compared to 2022 and 2020 when 29% agreed. (QoL, 2024)

37% feel the public have at least some influence on the decisions the Council makes, in line with the 8-city total, but an increase compared to 2022 when 32% agreed and 2020 when 28% agreed. (QoL, 2024)

24% of residents think that the Council communicates clearly about how their views have informed Council decisions. (GSS, 2025)

Voter turnout for local elections in Christchurch decreased to 37% in 2025. This follows a slight increase in 2022 to 44%, up from 42% in 2019 and 38% in 2016.

In 2024/2025, 97% (229 out of 237) of eligible meetings were streamed/available online.

**The OECD's Framework of Drivers of Trust in Public Institutions lists the following five competencies and values as main drivers that can strengthen public trust: responsiveness, reliability, openness, integrity and fairness.**

Within New Zealand specifically, the Auditor-General suggests more focus on competency, reliability and honesty is required by the public sector.

## What does this mean for the Council?

- 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.
- Distinguishing clearly between the process (how decisions are made) and the outcome (what is decided) may help residents feel heard and respected, even if they disagree with the outcome.
- The Council could explore ways to strengthen public confidence and foster greater trust and engagement in decision-making. This could include clarifying what the Council can and cannot influence or building on partnerships with Community Boards and local groups to ensure residents feel heard.
- When decisions don't reflect the views of all residents, it is important to be open and transparent about how and why those decisions were made, while also acknowledging community feedback and explaining how it was considered.
- 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 and in their engagement with the wider community.

# Social cohesion

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

Compared to Australia, New Zealand is scoring lower on four out of five dimensions measuring social cohesion. In 2024, 49% of New Zealanders agreed with positive statements that indicate social cohesion while in Australia 56% agreed. (Helen Clarke Foundation, 2025)

Trust in institutions, e.g. the health system, parliament and media, were at their lowest in New Zealand since 2014 as noted in the 2023 General Social Survey. (StatsNZ, 2023)

Along with trust in institutions, people were asked to rate their trust in most people in New Zealand. This decreased, from 6.7 out of 10 in 2021 to 6.5 in 2023. (StatsNZ, 2023)

People also reported a lower sense of belonging to New Zealand in 2023, at 8.2 out of 10, down from 8.6 in 2021. (StatsNZ, 2023)

In Canterbury, 21% reported they had experienced discrimination in the past 12 months (2023) up from 19% in 2021. (StatsNZ, 2023)

**Social cohesion and trust are declining in New Zealand, with less people feeling connected to others or trusting governance and institutions compared to previous years.**

Sense of belonging and experiences of discrimination are getting worse, particularly in regions like Canterbury. This is indicative of growing social fragmentation.

## What does this mean for the Council?

- Social cohesion and trust in institutions are under increasing pressure globally, nationally, and online. Christchurch is unlikely to remain immune.
- Fewer Christchurch residents are saying that neighbourly connection matters to them, which could reflect changing social norms, increased urban intensification, or more transient living patterns.
- It is worth reflecting on the important role that strong community connections and a strong sense of social cohesion have played in helping Christchurch navigate challenging times over the past 15 years. If fewer people feel that being connected to those around them matters, it may signal a weakening of the social ties that support collective resilience and wellbeing when pressures or crises arise.
- Public confidence is becoming harder to gain and to maintain in an environment of declining institutional trust. The Council might like to consider how to effectively engage and build trust with discontented residents.

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Christchurch City Council